

AUSTIN REAL ESTATE MARKET UPDATE

THE AUSTIN MSA HOUSING MARKET CONTINUES ITS MOVE TOWARDS
STABILIZATION AS INVENTORY GROWS TO ITS HIGHEST
LEVEL IN OVER A DECADE.

The Austin – Round Rock Housing Market:

New Home Sales – John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) decreased 9.0% year-over-year to 16,264 closings in March 2025.

New Home Sales Price – The median sales price for new homes in March 2025 was \$403,400, posting a 3.7% decrease.

Existing Single-Family Home Sales - [The Austin Board of Realtors \(ABOR\)](#) reports that existing single-family home sales decreased 13.8% year-over-year to 2,484 home sales across the Austin MSA in April 2025.

Existing Single-Family Home Price - In April 2025, the median sales price for existing single family homes decreased 3.2% year-over-year to \$450,000.

Clare Knapp, Ph.D., housing economist for Unlock MLS and the Austin Board of REALTORS®, weighed in on the April Market in ABOR's Central Texas Housing Report: "Central Texas's move toward more balanced market conditions mirrors housing market corrections nationwide, underscoring that what is happening in our market isn't an anomaly. What's unique to the Central Texas housing market is its supply of affordably priced inventory. Austin was one of the most affordability-constrained markets emerging from the pandemic.

Many parts of the country are still supply-constrained, but in April, the Austin area posted the highest inventory level affordable to the standard household since 2012."

The Austin MSA ended April 2025 with 5.6 months of housing inventory, up by 1.8 months year-over-year. This is still slightly below the 6-6.5 months of supply necessary for a truly balanced market.

The Texas Economy:

In April 2025, the unemployment rate in the Austin-Round Rock MSA was 3.1%, showing no change year-over-year.

According to the [Texas Workforce Commission](#), Austin's non-farm payroll job total as of April 2025 was 1,374,000, a 1.3% increase from April 2024.

In April 2025, the Private Education and Health Services sector led the way with a 4.0% increase year-over-year, followed by the Financial Activities sector with a 3.2% increase.

SAN ANTONIO REAL ESTATE MARKET UPDATE

NEW HOME SALES RISE IN THE SAN ANTONIO MSA AS THE SUMMER MARKET ARRIVES.

The San Antonio Housing Market:

New Home Sales - John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) saw an increase of 6.0% year-over-year to 18,555 sales in March 2025.

New Home Sales Price - The median sales price of new houses sold in March 2025 was \$307,900, decreasing by 1.3% year-over-year.

Existing Single-Family Home Sales - [The San Antonio Board of Realtors \(SABoR\)](#) reports that existing single-family home sales in the San Antonio MSA totaled 3,029 homes in April 2025, showing a decrease of 1.0%.

Existing Single-Family Home Price - The average price for existing single-family homes in the San Antonio MSA decreased 2.0% to be \$365,738 and the median price decreased 3.0% year-over-year to be \$304,000 in April 2025.

"We're continuing to see a market environment where inventory is growing and prices remain steady," said Reagan Williamson, SABOR's 2025 Chair of the Board. "Buyers have more homes to choose from, and sellers must remain strategic with pricing to stand out in a more competitive landscape."

[The San Antonio Board of Realtors \(SABoR\)](#)

reports that months of inventory came in at 5.3 months in April 2025.

The Texas Economy:

The unemployment rate in the San Antonio MSA posted an increase of 0.1% year-over-year to be 3.4% in April 2025.

According to the [Texas Workforce Commission \(TWC\)](#), San Antonio's non-farm payroll jobs totaled 1,200,900 in April 2025.

The Texas Workforce Commission reported that the Private Education and Health Services sector led the way with a 3.0% increase year-over-year in April 2025, followed by the Leisure and Hospitality and Government sectors with a 3.1% increase.

DALLAS - FORT WORTH REAL ESTATE MARKET UPDATE

THE DFW MSA SEES A RISE IN EXISTING HOME INVENTORY IN APRIL 2025.

The DFW-Arlington Housing Market:

New Home Sales - John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) showed a decrease of 1.0% year-over-year to be 41,990 sales in March 2025.

New Home Sales Price - The median sales price of new houses sold in March 2025 was \$412,100, an increase of 2.3% year-over-year.

Existing Single-Family Home Sales - [The Texas A&M Texas Real Estate Research Center](#) reports that existing single-family home sales volume decreased 3.8% year-over-year from 7,922 to 7,621 transactions in April 2025. Dollar volume dipped from \$4.1 billion to \$4.0 billion.

Existing Single-Family Home Price - The average price of an existing single-family home in the DFW MSA rose from \$512,267 to \$524,477 in April 2025. The average price per square foot declined from \$207.50 to \$207.40.

The median price for existing single-family homes decreased 2.4% year-over-year from \$410,000 to \$400,369 in April 2025. The median price per square foot also declined from \$198.60 to \$195.00.

Inventory of single-family homes rose year-over-year from 3.1 to 4.2 months of supply in April 2025, but it is still below a balanced market's inventory of 6-6.5 months.

The DFW-Arlington Economy:

According to the latest figures published by the [Texas Workforce Commission](#), the total number of non-farm jobs for the Dallas - Fort Worth - Arlington MSA was 4,296,500 in April 2025. This marks a 1.2% year-over-year increase.

The unemployment rate in the DFW MSA saw an increase of 0.1% to be 3.5% in April 2025.

The Mining, Logging and Construction sector led the way with a 3.2% increase year-over-year, and the Leisure and Hospitality sector saw the second highest year-over-year gain at 2.4% in April 2025.

	AUSTIN	SAN ANTONIO	DFW
NEW HOME TOTAL SALES (TTM: MARCH 2025)	16,264 (9.0% < 2024)	18,555 (6.0% > 2024)	41,990 (1.0% < 2024)
NEW HOME MEDIAN SALES PRICE (TTM: MARCH 2025)	\$403,400 (3.7% < 2024)	\$307,900 (1.3% < 2024)	\$412,100 (2.3% > 2024)
EXISTING HOME TOTAL SALES (APRIL 2025)	2,484 (13.8% < 2024)	3,029 (1.0% < 2024)	7,621 (3.8% < 2024)
EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE (APRIL 2025)	\$450,000 (3.2% < 2024)	\$304,000 (3.0% < 2024)	\$400,369 (2.4% < 2024)
EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY (APRIL 2025)	5.6 MONTHS	5.3 MONTHS	4.2 MONTHS