

Monthly Indicators

Lincoln Area Region



October 2025

U.S. existing-home sales climbed 1.5% month-over-month and 4.1% year-over-year, reaching a seasonally adjusted annual rate of 4.06 million units, according to the National Association of REALTORS® (NAR). The increase was partly driven by falling mortgage rates, which recently hit their lowest level in more than a year. Regionally, monthly sales advanced in the Northeast, South, and West, while the Midwest experienced a slight decline.

New Listings increased 34.2 percent for New Construction and 14.4 percent for Existing Homes. Pending Sales decreased 20.5 percent for New Construction and 2.6 percent for Existing Homes. Inventory increased 23.3 percent for New Construction and 19.5 percent for Existing Homes.

Median Closed Price increased 16.5 percent for New Construction and 8.5 percent for Existing Homes. Days on Market decreased 6.0 percent for New Construction but increased 20.0 percent for Existing Homes. Months Supply of Inventory increased 33.9 percent for New Construction and 15.8 percent for Existing Homes.

Housing inventory edged up 1.3% from the previous month to 1.55 million units, 14.0% higher than the same period last year. This represents a 4.6-month supply at the current sales pace, according to NAR. The median existing-home price grew 2.1% year-over-year to \$415,200, continuing the trend of annual price gains. The Midwest saw the largest year-over-year increase in median sales price, followed by the Northeast and South, while prices remained mostly flat in the West.

Quick Facts

+ 5.9%	+ 7.1%	+ 20.7%
Change in Closed Sales All Properties	Change in Median Closed Price All Properties	Change in Homes for Sale All Properties

This report covers residential real estate activity in the Lincoln area, which includes all of Lancaster and Seward counties, as well as the following ZIP codes: 68003, 68304, 68347, 68349, 68366, 68407, 68418, 68454, 68461 and 68462. Percent changes are calculated using rounded figures.

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New Construction Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. New Construction properties only.



Lincoln Area Region

Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		117	157	+ 34.2%	1,124	1,270	+ 13.0%
Pending Sales		44	35	- 20.5%	509	467	- 8.3%
Closed Sales		40	44	+ 10.0%	461	488	+ 5.9%
Days on Market Until Sale		50	47	- 6.0%	48	41	- 14.6%
Median Closed Price		\$456,975	\$532,274	+ 16.5%	\$445,000	\$461,508	+ 3.7%
Average Closed Price		\$473,673	\$564,196	+ 19.1%	\$469,713	\$493,676	+ 5.1%
Percent of List Price Received		100.7%	100.5%	- 0.2%	100.2%	100.4%	+ 0.2%
Housing Affordability Index		78	69	- 11.5%	80	80	0.0%
Inventory of Homes for Sale		301	371	+ 23.3%	—	—	—
Months Supply of Inventory		6.2	8.3	+ 33.9%	—	—	—

Existing Homes Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Existing Homes properties only.



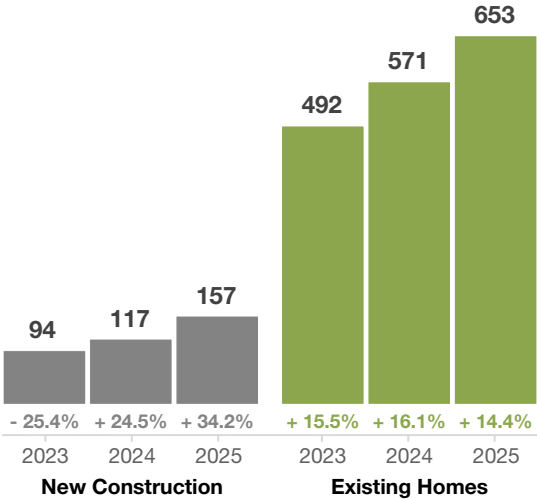
Lincoln Area Region

Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		571	653	+ 14.4%	5,316	6,042	+ 13.7%
Pending Sales		308	300	- 2.6%	3,349	3,560	+ 6.3%
Closed Sales		314	331	+ 5.4%	3,261	3,424	+ 5.0%
Days on Market Until Sale		15	18	+ 20.0%	16	18	+ 12.5%
Median Closed Price		\$281,100	\$304,900	+ 8.5%	\$280,000	\$290,000	+ 3.6%
Average Closed Price		\$326,585	\$351,762	+ 7.7%	\$327,268	\$340,537	+ 4.1%
Percent of List Price Received		99.0%	98.8%	- 0.2%	99.0%	98.7%	- 0.3%
Housing Affordability Index		127	121	- 4.7%	127	127	0.0%
Inventory of Homes for Sale		620	741	+ 19.5%	—	—	—
Months Supply of Inventory		1.9	2.2	+ 15.8%	—	—	—

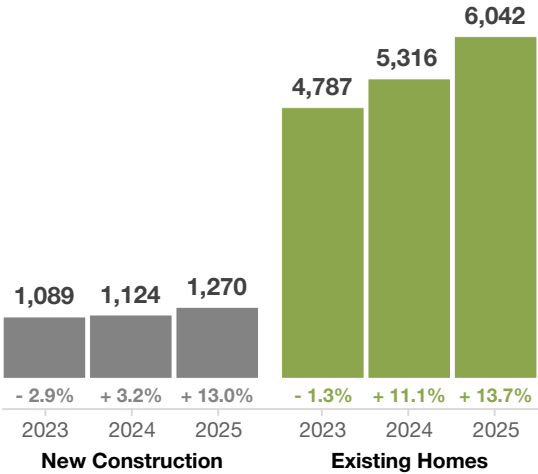
New Listings

A count of the properties that have been newly listed on the market in a given month.

October

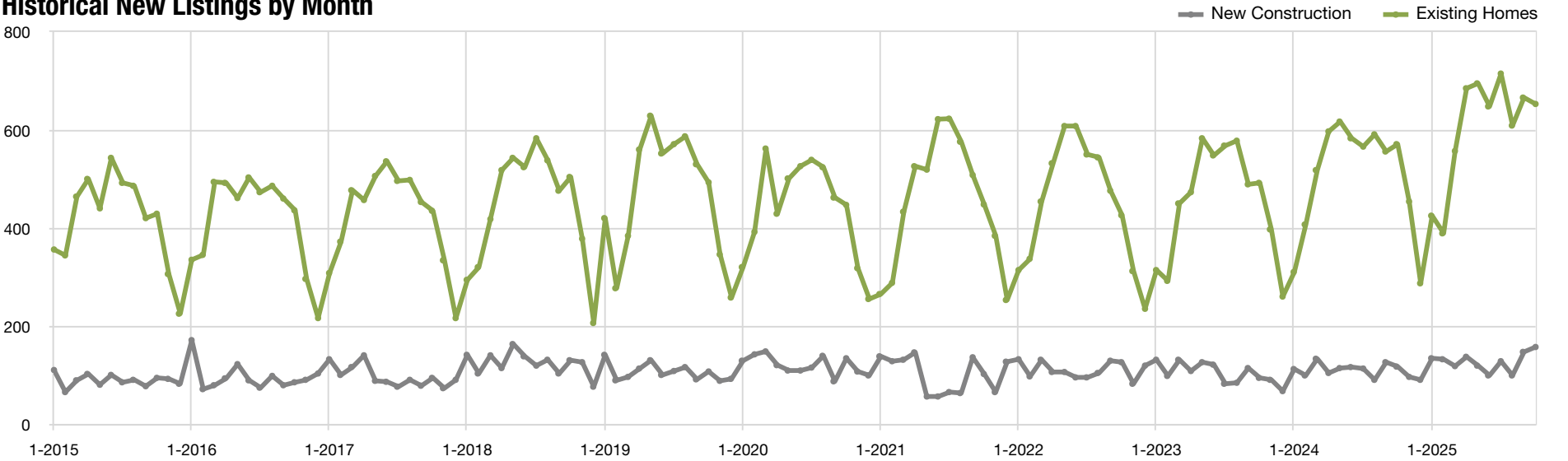


Year to Date



New Listings	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	96	+ 6.7%	454	+ 14.4%
Dec-2024	90	+ 34.3%	287	+ 10.4%
Jan-2025	134	+ 19.6%	425	+ 37.1%
Feb-2025	132	+ 33.3%	389	- 4.4%
Mar-2025	118	- 11.3%	557	+ 7.5%
Apr-2025	137	+ 31.7%	685	+ 14.7%
May-2025	119	+ 4.4%	695	+ 12.6%
Jun-2025	99	- 14.7%	648	+ 11.1%
Jul-2025	128	+ 13.3%	715	+ 26.3%
Aug-2025	99	+ 10.0%	609	+ 3.0%
Sep-2025	147	+ 16.7%	666	+ 19.8%
Oct-2025	157	+ 34.2%	653	+ 14.4%
12-Month Avg	121	+ 13.1%	565	+ 13.5%

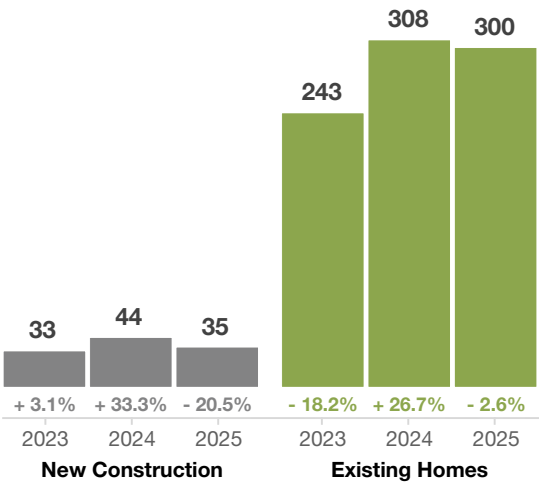
Historical New Listings by Month



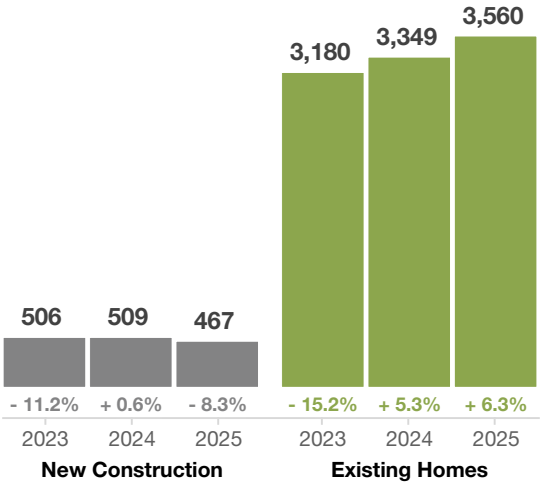
Pending Sales

A count of the properties on which offers have been accepted in a given month.

October

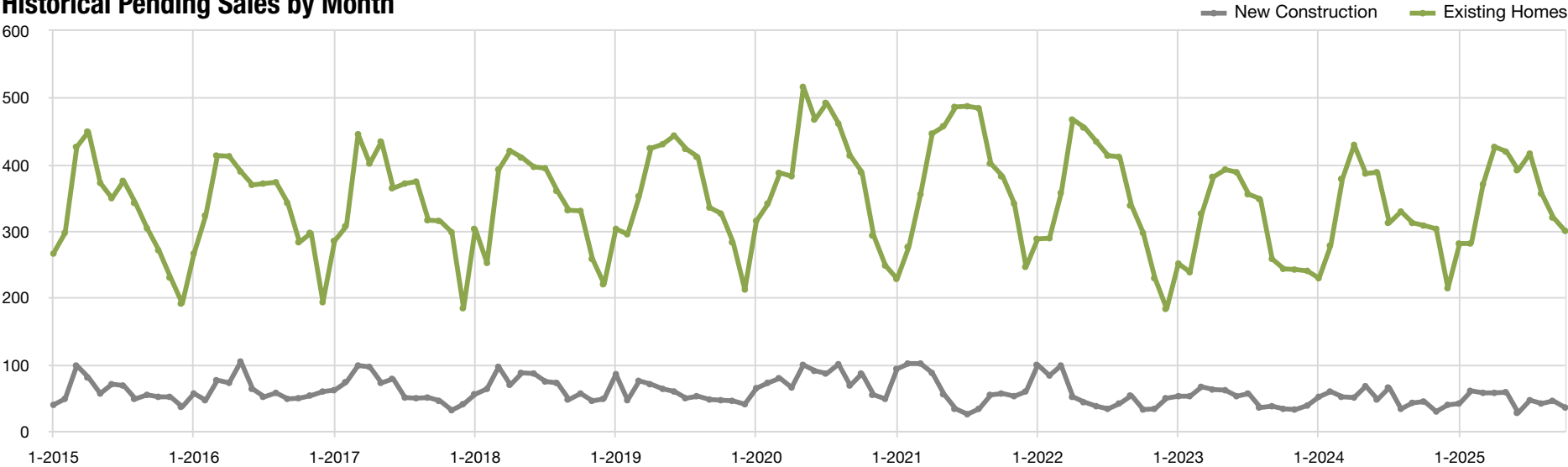


Year to Date



Pending Sales	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	29	- 9.4%	303	+ 25.2%
Dec-2024	39	+ 2.6%	214	- 10.8%
Jan-2025	41	- 19.6%	281	+ 22.7%
Feb-2025	60	+ 1.7%	281	+ 1.1%
Mar-2025	57	+ 11.8%	370	- 2.1%
Apr-2025	57	+ 14.0%	426	- 0.7%
May-2025	58	- 13.4%	419	+ 8.5%
Jun-2025	27	- 42.6%	391	+ 0.8%
Jul-2025	46	- 29.2%	416	+ 33.3%
Aug-2025	41	+ 24.2%	356	+ 8.2%
Sep-2025	45	+ 7.1%	320	+ 2.6%
Oct-2025	35	- 20.5%	300	- 2.6%
12-Month Avg	45	- 6.3%	340	+ 6.6%

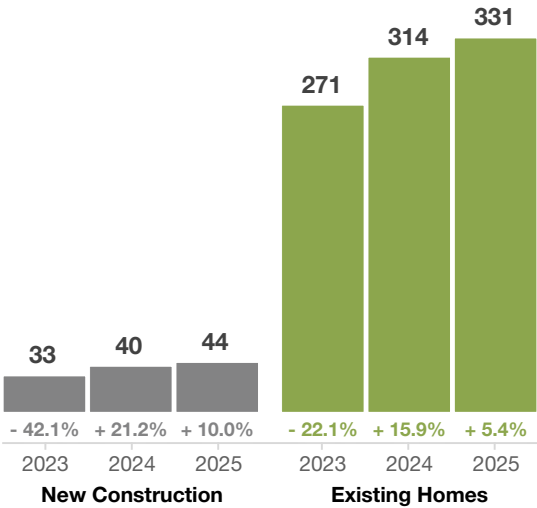
Historical Pending Sales by Month



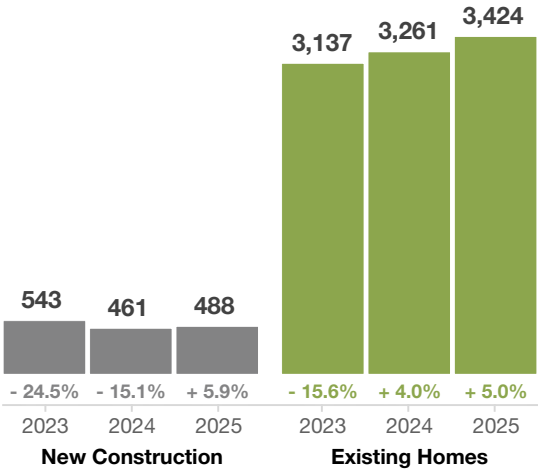
Closed Sales

A count of the actual sales that closed in a given month.

October

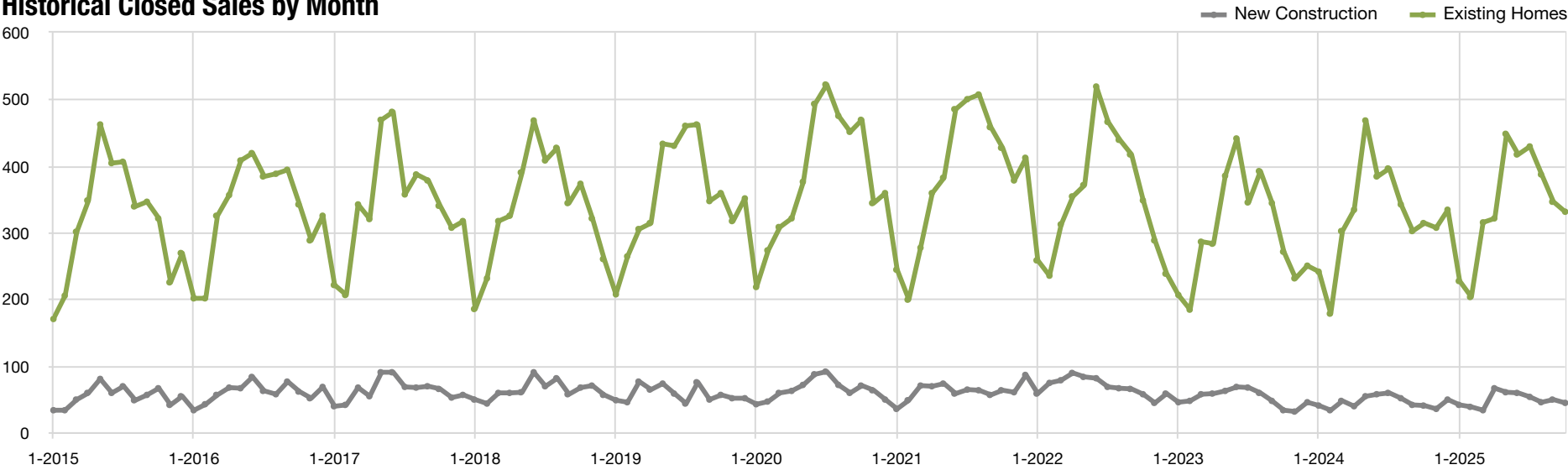


Year to Date



Closed Sales	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	35	+ 12.9%	307	+ 32.9%
Dec-2024	49	+ 8.9%	334	+ 33.6%
Jan-2025	41	+ 2.5%	227	- 5.8%
Feb-2025	38	+ 15.2%	203	+ 14.0%
Mar-2025	33	- 29.8%	315	+ 4.3%
Apr-2025	66	+ 69.2%	321	- 3.9%
May-2025	60	+ 11.1%	448	- 4.3%
Jun-2025	59	+ 3.5%	417	+ 8.6%
Jul-2025	53	- 10.2%	429	+ 8.3%
Aug-2025	45	- 11.8%	387	+ 13.2%
Sep-2025	49	+ 19.5%	346	+ 14.6%
Oct-2025	44	+ 10.0%	331	+ 5.4%
12-Month Avg	48	+ 6.7%	339	+ 8.7%

Historical Closed Sales by Month



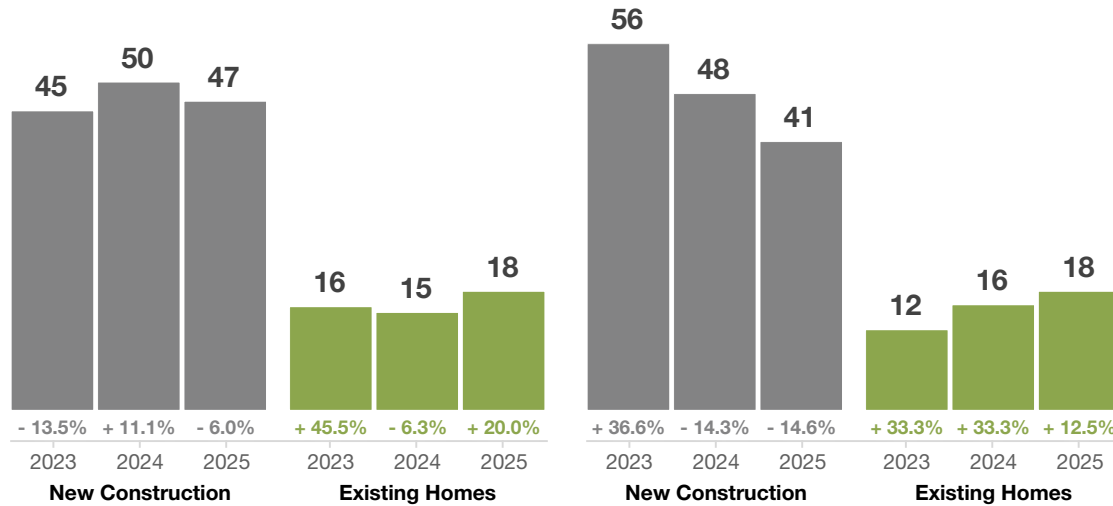
Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given month.

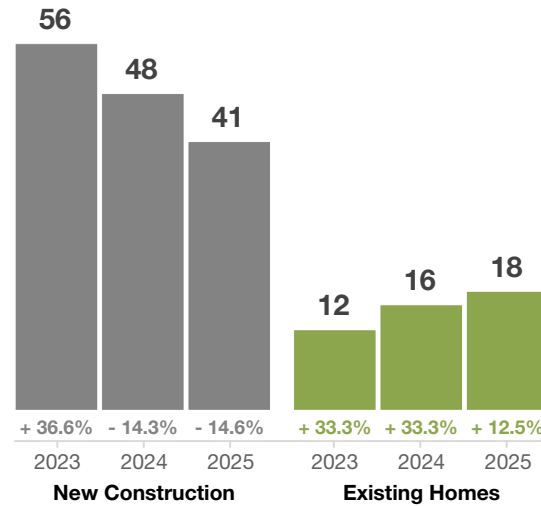


Lincoln Area Region

October



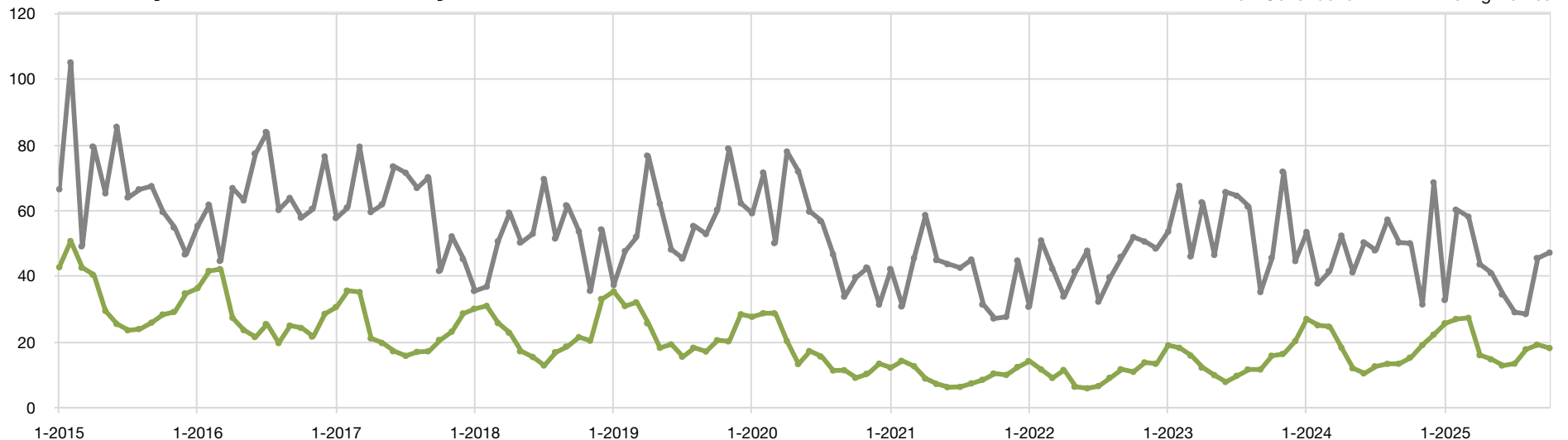
Year to Date



Days on Market	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	31	- 56.9%	19	+ 18.8%
Dec-2024	68	+ 54.5%	22	+ 10.0%
Jan-2025	33	- 37.7%	25	- 7.4%
Feb-2025	60	+ 57.9%	27	+ 8.0%
Mar-2025	58	+ 41.5%	27	+ 12.5%
Apr-2025	43	- 17.3%	16	- 11.1%
May-2025	41	0.0%	15	+ 25.0%
Jun-2025	34	- 32.0%	13	+ 30.0%
Jul-2025	29	- 39.6%	13	+ 8.3%
Aug-2025	28	- 50.9%	18	+ 38.5%
Sep-2025	45	- 10.0%	19	+ 46.2%
Oct-2025	47	- 6.0%	18	+ 20.0%
12-Month Avg*	43	- 13.3%	18	+ 13.5%

* Days on Market for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

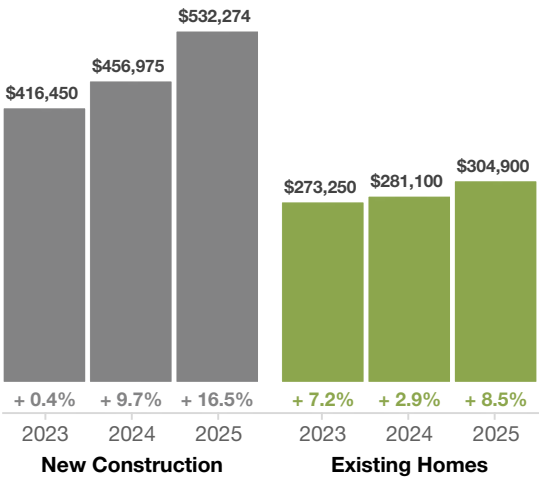
Historical Days on Market Until Sale by Month



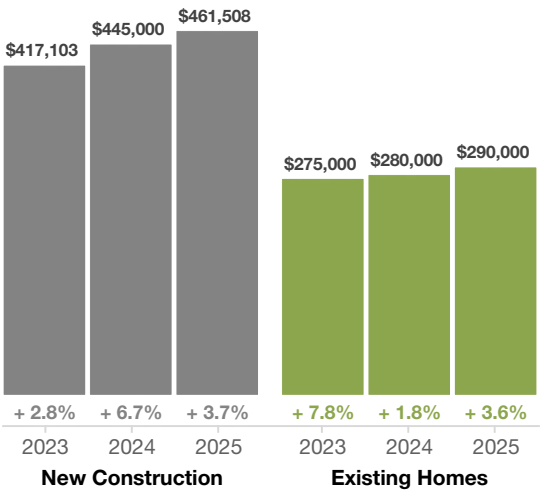
Median Closed Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

October



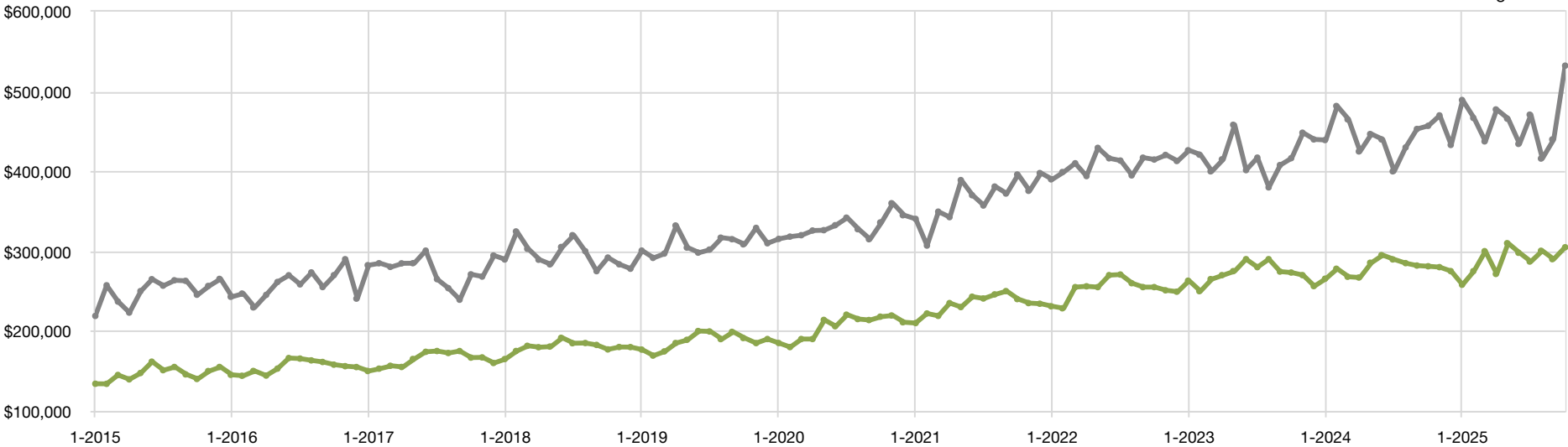
Year to Date



Median Closed Price	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	\$470,000	+ 4.8%	\$280,000	+ 3.7%
Dec-2024	\$433,018	- 1.6%	\$275,000	+ 7.3%
Jan-2025	\$489,241	+ 11.4%	\$258,000	- 2.8%
Feb-2025	\$466,833	- 3.1%	\$275,000	- 1.1%
Mar-2025	\$437,500	- 5.9%	\$300,000	+ 12.0%
Apr-2025	\$477,450	+ 12.4%	\$271,500	+ 1.7%
May-2025	\$465,955	+ 4.3%	\$310,000	+ 8.6%
Jun-2025	\$434,350	- 1.3%	\$298,000	+ 1.0%
Jul-2025	\$470,909	+ 17.7%	\$287,000	- 0.9%
Aug-2025	\$415,995	- 3.2%	\$300,500	+ 5.4%
Sep-2025	\$439,900	- 2.9%	\$290,000	+ 2.8%
Oct-2025	\$532,274	+ 16.5%	\$304,900	+ 8.5%
12-Month Avg*	\$459,950	+ 3.2%	\$290,000	+ 3.6%

* Median Closed Price for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

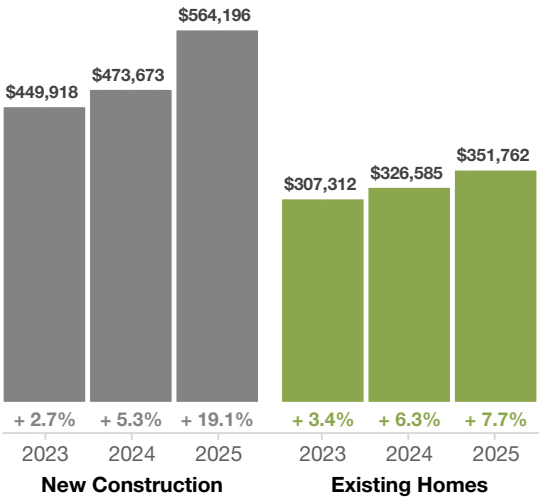
Historical Median Closed Price by Month



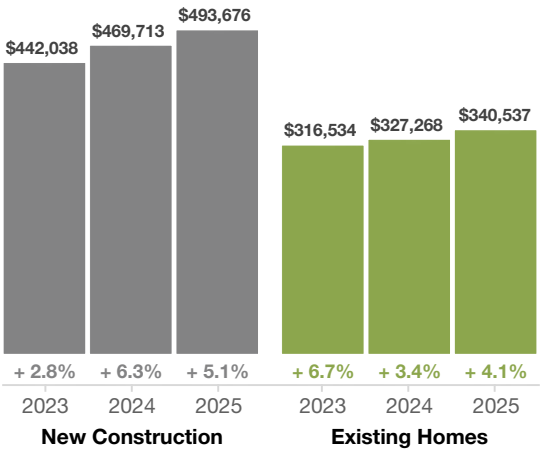
Average Closed Price

Average sales price for all closed sales, not accounting for seller concessions, in a given month.

October



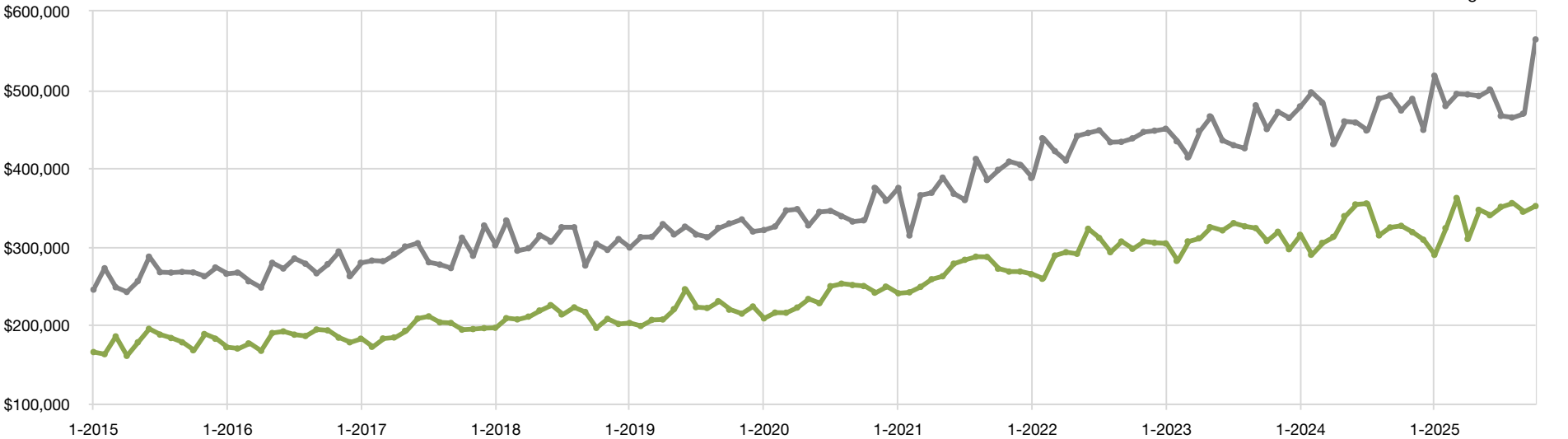
Year to Date



Average Closed Price	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	\$488,483	+ 3.5%	\$318,594	- 0.1%
Dec-2024	\$448,942	- 3.3%	\$308,899	+ 4.1%
Jan-2025	\$517,979	+ 8.2%	\$289,590	- 8.1%
Feb-2025	\$479,335	- 3.5%	\$323,643	+ 11.7%
Mar-2025	\$494,819	+ 2.3%	\$362,080	+ 18.8%
Apr-2025	\$494,043	+ 14.7%	\$309,838	- 0.9%
May-2025	\$492,153	+ 7.1%	\$346,945	+ 2.4%
Jun-2025	\$500,403	+ 9.2%	\$340,104	- 3.9%
Jul-2025	\$466,665	+ 4.1%	\$350,814	- 1.2%
Aug-2025	\$464,678	- 4.9%	\$355,545	+ 13.1%
Sep-2025	\$469,487	- 4.8%	\$344,555	+ 6.2%
Oct-2025	\$564,196	+ 19.1%	\$351,762	+ 7.7%
12-Month Avg*	\$489,526	+ 4.3%	\$336,280	+ 3.6%

* Average Closed Price for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

Historical Average Closed Price by Month



Percent of List Price Received

Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

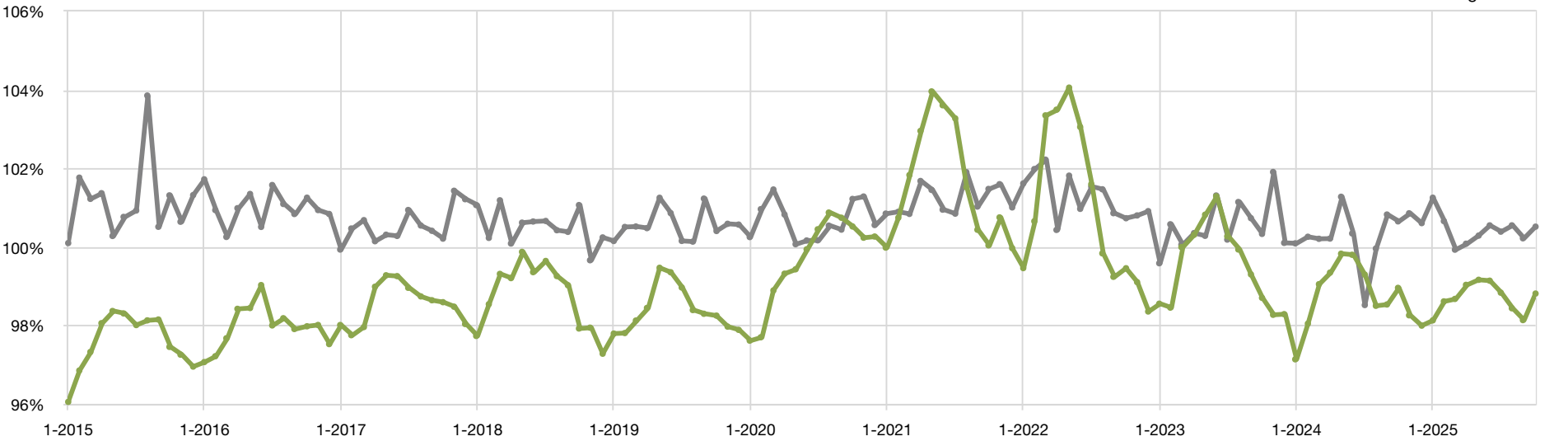
October



Pct. of List Price Received	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	100.9%	- 1.0%	98.3%	0.0%
Dec-2024	100.6%	+ 0.5%	98.0%	- 0.3%
Jan-2025	101.3%	+ 1.2%	98.1%	+ 1.0%
Feb-2025	100.7%	+ 0.4%	98.6%	+ 0.6%
Mar-2025	99.9%	- 0.3%	98.7%	- 0.3%
Apr-2025	100.1%	- 0.1%	99.0%	- 0.3%
May-2025	100.3%	- 1.0%	99.2%	- 0.6%
Jun-2025	100.5%	+ 0.2%	99.1%	- 0.7%
Jul-2025	100.4%	+ 1.9%	98.8%	- 0.5%
Aug-2025	100.5%	+ 0.5%	98.4%	- 0.1%
Sep-2025	100.2%	- 0.6%	98.1%	- 0.4%
Oct-2025	100.5%	- 0.2%	98.8%	- 0.2%
12-Month Avg*	100.5%	+ 0.2%	98.6%	- 0.3%

* Pct. of List Price Received for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

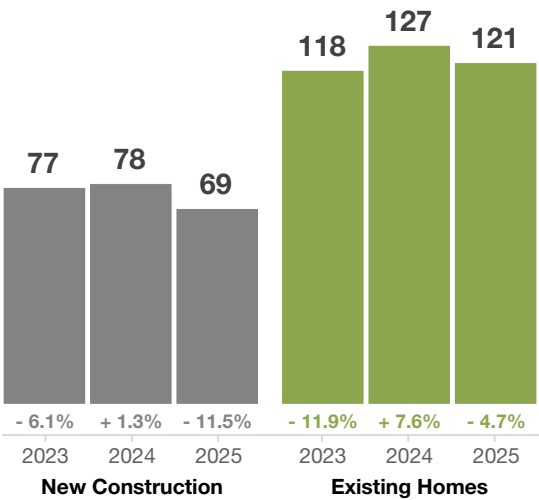
Historical Percent of List Price Received by Month



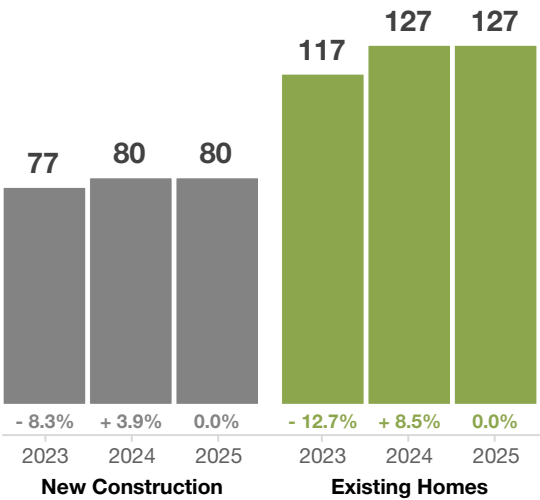
Housing Affordability Index

This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

October

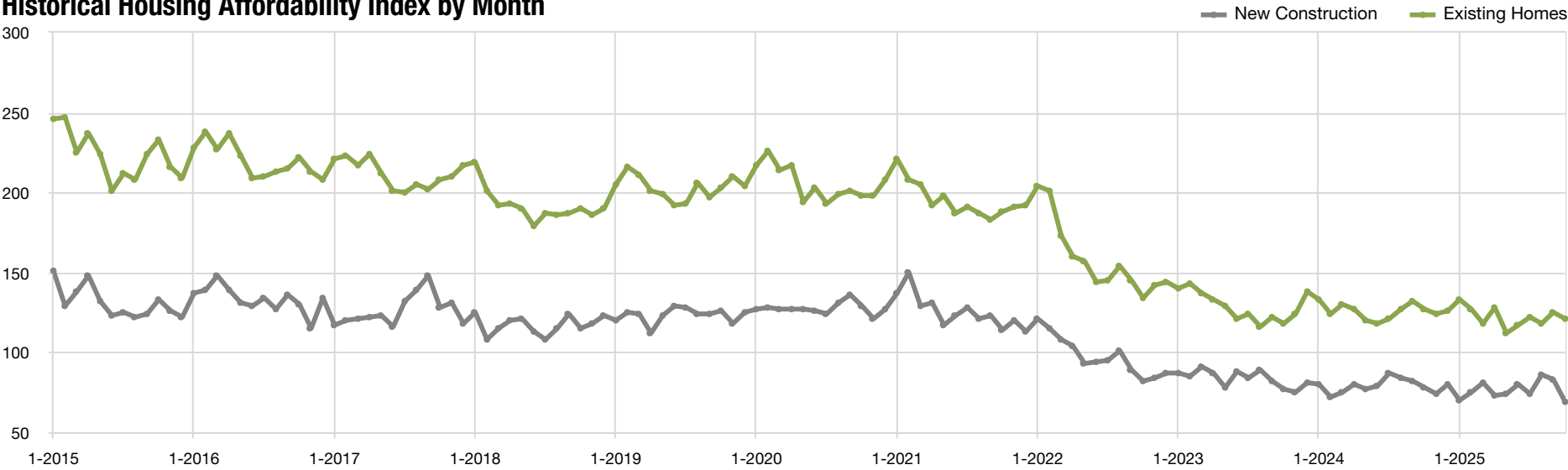


Year to Date



Affordability Index	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	74	- 1.3%	124	0.0%
Dec-2024	80	- 1.2%	126	- 8.7%
Jan-2025	70	- 12.5%	133	0.0%
Feb-2025	75	+ 4.2%	127	+ 2.4%
Mar-2025	81	+ 8.0%	118	- 9.2%
Apr-2025	73	- 8.8%	128	+ 0.8%
May-2025	74	- 3.9%	112	- 6.7%
Jun-2025	80	+ 1.3%	117	- 0.8%
Jul-2025	74	- 14.9%	122	+ 0.8%
Aug-2025	86	+ 2.4%	118	- 7.1%
Sep-2025	83	+ 1.2%	125	- 5.3%
Oct-2025	69	- 11.5%	121	- 4.7%
12-Month Avg	77	- 2.5%	123	- 3.1%

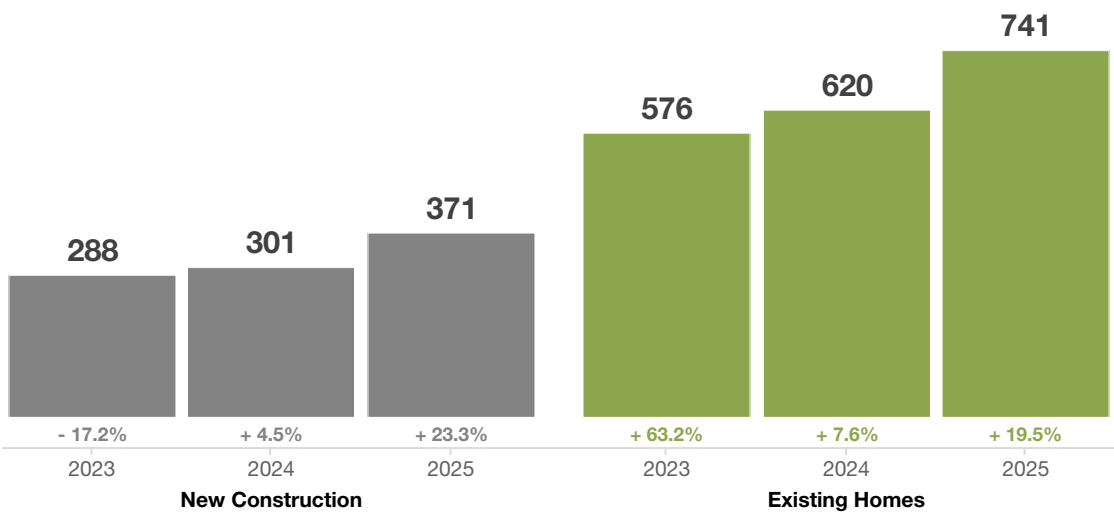
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

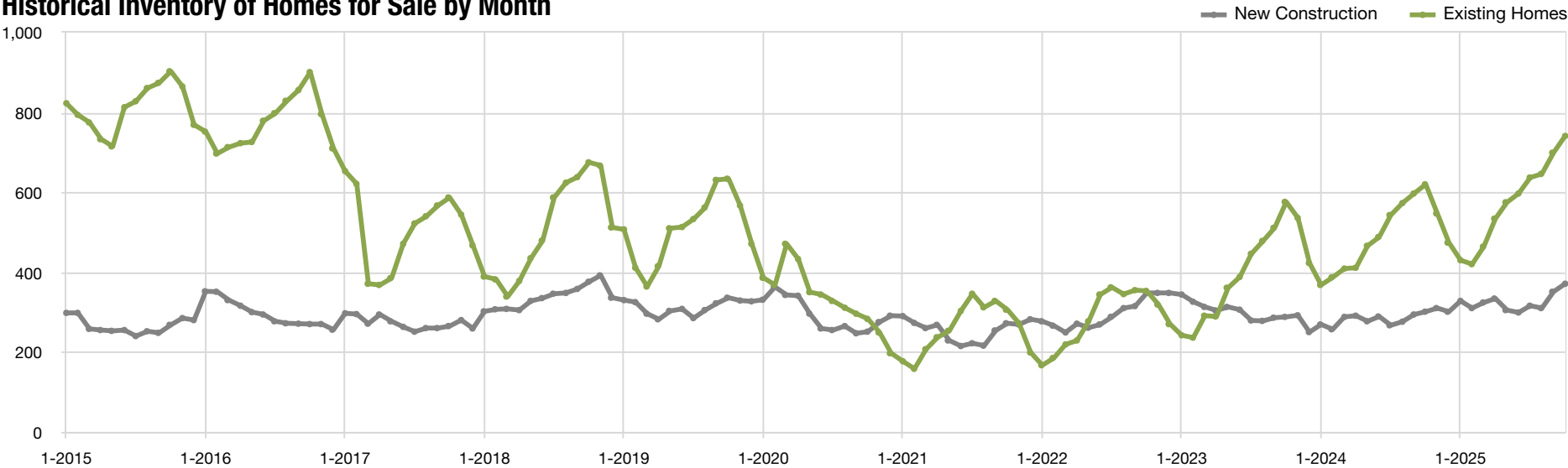
The number of properties available for sale in active status at the end of a given month.

October



Homes for Sale	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	310	+ 6.2%	547	+ 2.1%
Dec-2024	301	+ 20.4%	474	+ 12.1%
Jan-2025	328	+ 21.9%	430	+ 16.8%
Feb-2025	310	+ 20.6%	420	+ 8.5%
Mar-2025	324	+ 12.5%	464	+ 13.4%
Apr-2025	334	+ 14.8%	534	+ 29.9%
May-2025	305	+ 10.1%	575	+ 23.4%
Jun-2025	299	+ 3.5%	597	+ 22.3%
Jul-2025	316	+ 18.4%	637	+ 17.3%
Aug-2025	310	+ 12.3%	646	+ 12.7%
Sep-2025	351	+ 19.4%	699	+ 17.1%
Oct-2025	371	+ 23.3%	741	+ 19.5%
12-Month Avg	322	+ 15.4%	564	+ 16.3%

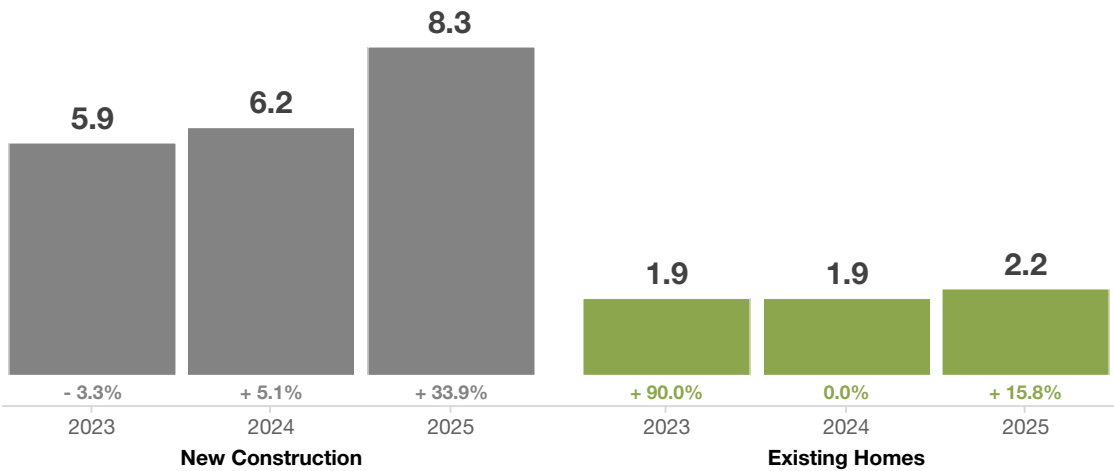
Historical Inventory of Homes for Sale by Month



Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

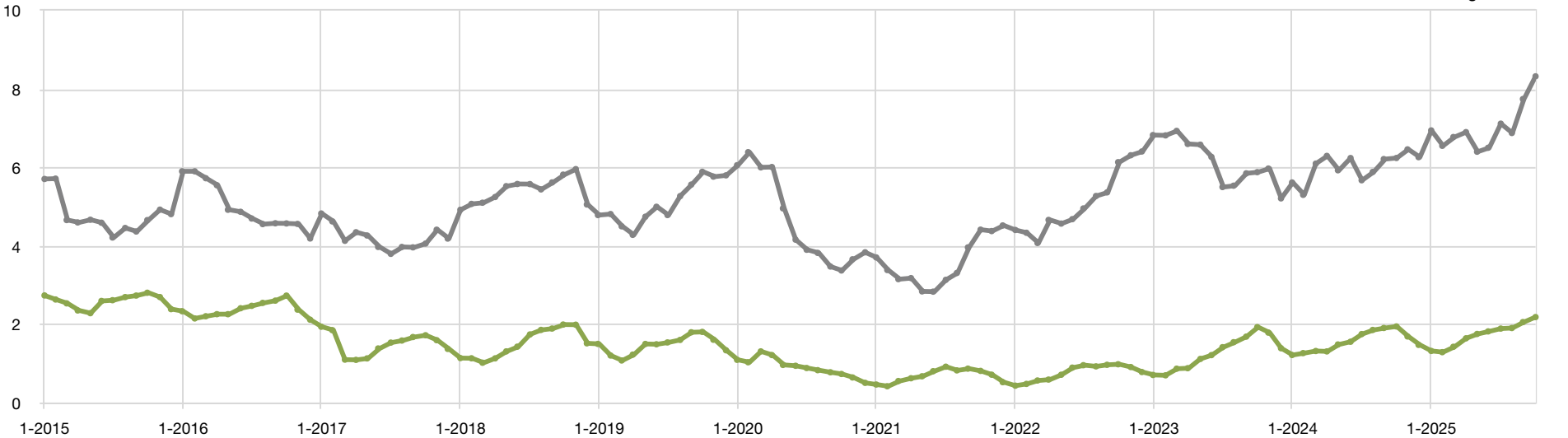
October



Months Supply	New Construction	Year-Over-Year Change	Existing Homes	Year-Over-Year Change
Nov-2024	6.5	+ 8.3%	1.7	- 5.6%
Dec-2024	6.3	+ 21.2%	1.5	+ 7.1%
Jan-2025	6.9	+ 23.2%	1.3	+ 8.3%
Feb-2025	6.5	+ 22.6%	1.3	0.0%
Mar-2025	6.8	+ 11.5%	1.4	+ 7.7%
Apr-2025	6.9	+ 9.5%	1.6	+ 23.1%
May-2025	6.4	+ 8.5%	1.7	+ 13.3%
Jun-2025	6.5	+ 4.8%	1.8	+ 12.5%
Jul-2025	7.1	+ 24.6%	1.9	+ 11.8%
Aug-2025	6.9	+ 16.9%	1.9	0.0%
Sep-2025	7.7	+ 24.2%	2.1	+ 10.5%
Oct-2025	8.3	+ 33.9%	2.2	+ 15.8%
12-Month Avg*	6.9	+ 17.3%	1.7	+ 8.9%

* Months Supply for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month



New and Existing Homes Combined

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.



Lincoln Area Region

Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		688	810	+ 17.7%	6,440	7,312	+ 13.5%
Pending Sales		352	335	- 4.8%	3,858	4,027	+ 4.4%
Closed Sales		354	375	+ 5.9%	3,722	3,912	+ 5.1%
Days on Market Until Sale		19	21	+ 10.5%	20	21	+ 5.0%
Median Closed Price		\$297,000	\$318,000	+ 7.1%	\$300,000	\$313,530	+ 4.5%
Average Closed Price		\$343,252	\$376,687	+ 9.7%	\$344,920	\$359,645	+ 4.3%
Percent of List Price Received		99.1%	99.0%	- 0.1%	99.1%	99.0%	- 0.1%
Housing Affordability Index		120	116	- 3.3%	119	117	- 1.7%
Inventory of Homes for Sale		921	1,112	+ 20.7%	—	—	—
Months Supply of Inventory		2.5	2.9	+ 16.0%	—	—	—