The H.O.M.E. Report

Housing Observation & Market Evaluation — Market Intelligence for Buyers and Sellers

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Central Oregon, October 2026

Bend · Redmond · Sisters · La Pine · Crook County · Jefferson County

Data scope: Homes (including manufactured homes on land), townhomes, and condos only. Land, farms, manufactured homes in rented-lot parks, multifamily, and commercial properties are excluded, so totals may differ from the official MLS Market Summary. The same criteria apply across all six markets.

LAST UPDATED NOVEMBER 5TH, 2026

CENTRAL OREGON IN 60 SECONDS

The regional picture before you turn to your market.

October split Central Oregon into two broad groups. Buyer activity slowed in Bend, Redmond, La Pine, Crook County, and Jefferson County, while Sisters saw a sharp rebound in pending contracts. Inventory generally did not surge alongside the slowdown, so the bigger story was weaker buyer follow-through rather than a flood of new supply. Conditions still varied widely by price range.

MARKET	OCTOBER READING	PAGE
Bend	Buyer activity cooled sharply while inventory stayed close to its seasonal path, keeping the overall market Balanced.	02
Redmond	Buyer follow-through weakened as new listings and active inventory ran above normal, creating more competition for sellers.	06
Sisters	Pending activity rebounded sharply, but more than eight months of supply kept the overall market buyer-favored.	10
La Pine	Buyer activity slowed well below normal while inventory stayed near its seasonal path, reinforcing buyer leverage.	12
Crook County	Buyer activity softened while new listings ran above normal, leaving the market firmly buyer-favored.	14
Jefferson County	Pending activity slowed while inventory also pulled back, leaving buyers with leverage but somewhat less choice.	16

FOR BUYERS

Buyer competition generally eased in October, but not because inventory surged everywhere. In several markets, fewer buyers were moving to contract while supply stayed near normal. The best opportunities still depend heavily on price range, with some lower-priced tiers remaining much more competitive than the market overall.

FOR SELLERS

October made price-tier differences even more important. Several markets still had seller-favored pockets, but buyer activity weakened across much of the region. Sellers need to price against current competition and demand in their specific range, not the overall market label.

Report Guide: definitions, sample-size notes and full data scope are on page 18. Figures follow the same criteria across all six markets.

SCAN TO SUBSCRIBE

Bend

Market direction

Buyer activity cooled sharply in October. Pending contracts fell well below their normal pace while inventory stayed close to its seasonal path, leaving Bend Balanced overall.

October 2026

Where buyers and sellers have leverage right now

MEDIAN SOLD PRICE

$755,000

+4.9% from September · +0.7% year over year

MEDIAN DAYS ON MARKET

49 days 48 days in September

ABSORPTION RATE

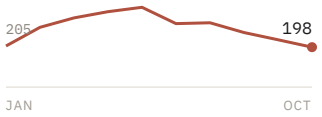
4.1 months 4.3 months in September

NEW LISTINGS

−19.5%

Expected −12.1%

−7.4% vs norm



198 this Oct · −3.9% vs 2025
−21.1% vs 2024

PENDING

−21.0%

Expected −1.3%

−19.7% vs norm

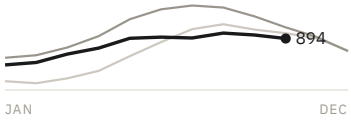
162 this Oct · −20.2% vs 2025
−24.3% vs 2024

ACTIVE

−4.4%

Expected −5.3%

+0.9% vs norm



894 this Oct · −10.5% vs 2025
−5.3% vs 2024

SPARKLINES: MONTHLY VOLUME · NEW AND PENDING 2026; ACTIVE 2024–2026

FOR BUYERS

Pending activity ran nearly 20 points below normal while inventory stayed close to its seasonal path. Buyers were facing less competition, but not because more homes flooded the market — fewer buyers were moving forward.

FOR SELLERS

Inventory did not build unusually in October, but buyer activity fell much faster than new supply. Sellers still faced a competitive market even without another surge in homes for sale, making price and positioning especially important.

"Expected" adjusts for normal seasonal change, so the report highlights what actually ran differently this month.

Where the Market Is Strongest and Weakest

This is not one market. Conditions change materially by price tier.

PRICE TIER	NEW VS EXPECTED	PENDING VS EXPECTED	MONTHS SUPPLY	LEVERAGE
<$499k	+3.6%	**+34.8%**	4.8	BALANCED
$500–599k	0.0%	**+22.2%**	3.6	SELLER
$600–699k	**+19.2%**	**−20.8%**	3.3	SELLER
$700–799k	**+20.8%**	**−33.3%**	3.2	SELLER
$800–899k	0.0%	**−35.7%**	2.9	SELLER
$900–999k	−7.1%	**+20.0%**	3.4	SELLER
$1–2M	−7.0%	**+19.4%**	4.6	BALANCED
$2–3M	**−20.0%**	**−37.5%**	5.8	BALANCED
$3M+	−100.0%	0.0%	9.3	BUYER

*Cleared this month's tier-level notability bar (±10pp and at least 5 actual transactions).

TIER TO WATCH

$700k–$799k

PENDING	NEW LISTINGS	MONTHS SUPPLY
−33.3%	+20.8%	3.2
below normal	above normal	seller

The $700k–$799k tier still favors sellers at just 3.2 months of supply, but new listings ran 20.8% above normal while pending activity fell 33.3% below normal. Watch whether that gap starts loosening conditions in November.

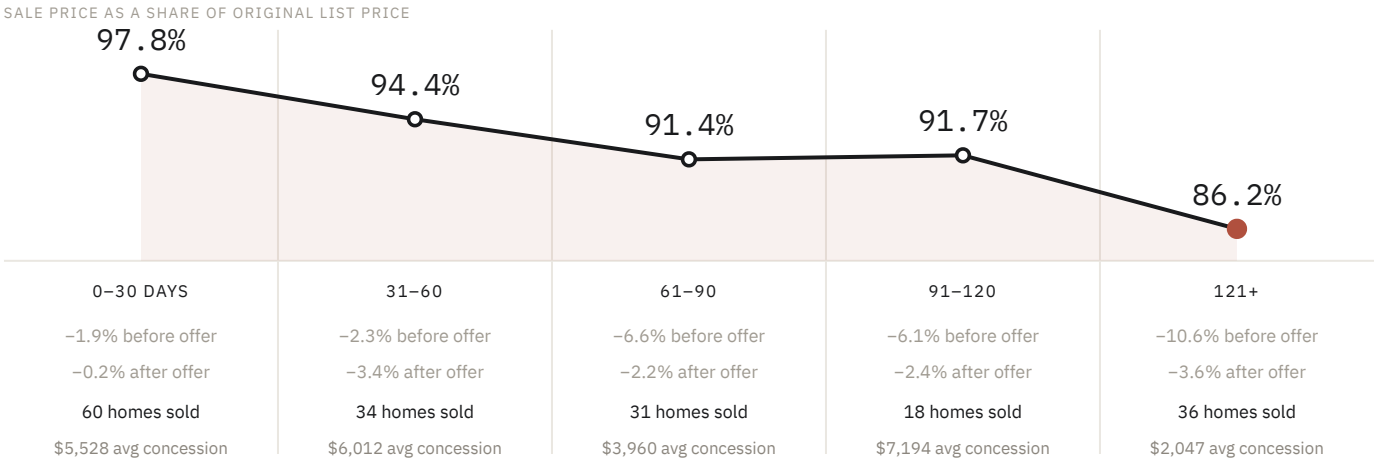
FOR BUYERS

Buyer activity was strongest below $600k, where pending contracts ran well above normal. From $600k–$899k, buyer activity weakened even though supply still favored sellers — giving buyers more breathing room than the leverage labels alone suggest.

FOR SELLERS

Seller leverage stretched from $500k to just under $1M, but demand was split. Pending activity stayed strong in $500k–$599k and $900k–$999k, while it fell well below normal from $600k–$899k. Sellers need to price to their specific tier, not the Bend market overall.

What Market Time Does to Pricing



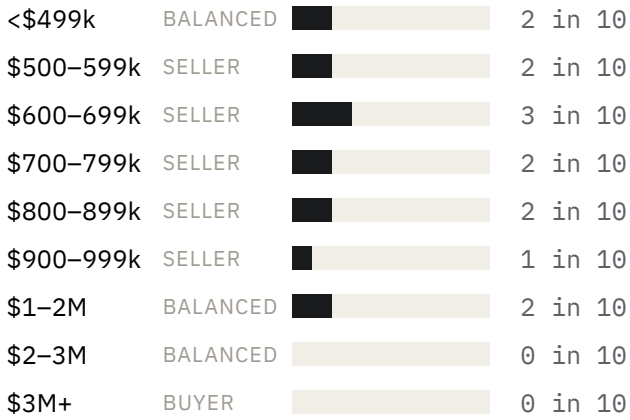
Pricing gaps widened with market time. Homes finding a buyer within 30 days had been reduced 1.9% before an offer, compared with 10.6% for homes taking 121+ days.

Even "fast" sales separate early

	0–7 DAYS	8–15	16–30
Sales	29	9	22
SP/OP	97.4%	99.9%	97.6%

Smaller samples can create short-term noise; the broader DOM buckets show the clearer trend.

Speed to contract by tier



Listings pending within 14 days, out of every 10, in ascending price order.

Seller leverage did not guarantee a fast sale. Among Bend's Seller-market tiers, roughly 3 in 10 $600k–$699k listings went pending within two weeks, compared with only 1 in 10 at $900k–$999k.

FOR BUYERS

Longer market time was associated with substantially more buyer leverage. Homes taking 121+ days had already been reduced 10.6% before an offer and ultimately closed at just 86.2% of original list price.

FOR SELLERS

Early positioning continued to matter. Homes finding a buyer within 30 days closed at 97.8% of original list price, while the 121+ day group closed at 86.2% after much larger price reductions.

What to Watch Next

MEDIAN DIRECTION

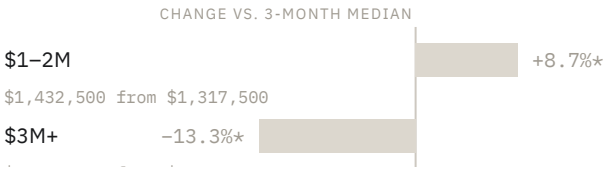
At the edge

PENDING MEDIAN POSITION

Pending's median price is currently around **$689,000**, 89.5% of the way through the $600–699k tier — within striking distance of the $700–799k line.

At roughly $689,000, Bend's Pending median is near the top of the $600k–$699k tier. A relatively small move higher in November would push it into $700k–$799k.

PRICE MOVEMENT WORTH WATCHING



*Both are low-volume tiers — a single unusual sale can move these medians more than a real shift in pricing.

SIGNALS INTO NOVEMBER

01 Whether October's Pending slowdown — 19.7 points below normal — continues into November.

02 Whether weaker buyer activity from $600k–$899k begins to loosen the Seller leverage currently showing in those tiers.

03 Whether stronger demand below $600k continues, where Pending activity finished October well above normal.

NEW CONSTRUCTION COMPETITION

TRAILING 3 MONTHS · AUG–OCT 2026

NEW-BUILD MEDIAN
$672,500

RESALE MEDIAN
$735,250

NEW-BUILD DISCOUNT
−8.5%
narrowest gap this year

HEAVIEST NEW-BUILD SHARE
$3M+ · 33%
<$499k · 31%

FOR BUYERS

New construction sold at an 8.5% lower median than resale over the last three months — the narrowest gap this year. Buyers should compare builder incentives and total monthly cost alongside price, rather than assume new construction is automatically the cheaper option.

FOR SELLERS

The new-build price gap narrowed, but builders still accounted for 31% of sales under $499k. Resale sellers at the entry level continue to compete directly with new construction on price, condition, and incentives.

Redmond

Market direction

October 2026

Where buyers and sellers have leverage right now

Buyer activity slowed sharply in October while new listings ran above normal. Active inventory also stayed above its seasonal path, keeping Redmond Balanced but giving buyers more choice.

MEDIAN SOLD PRICE

$505,000

+1.2% from September · −4.7% year over year

MEDIAN DAYS ON MARKET

55 days 39 days in September

ABSORPTION RATE

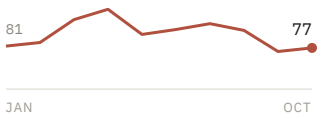
4.8 months 4.7 months in September

NEW LISTINGS

+10.0%

Expected −4.9%

+14.9% vs norm



77 this Oct · −14.4% vs 2025
−9.4% vs 2024

PENDING

−34.8%

Expected −8.7%

−26.1% vs norm

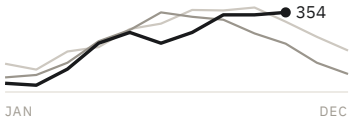
45 this Oct · −32.8% vs 2025
−48.3% vs 2024

ACTIVE

+0.6%

Expected −3.8%

+4.4% vs norm



354 this Oct · +22.1% vs 2025
+5.7% vs 2024

SPARKLINES: MONTHLY VOLUME · NEW AND PENDING 2026; ACTIVE 2024–2026

FOR BUYERS

Pending activity fell 26 points below normal while new listings ran above trend. Buyers had fewer competitors moving to contract at the same time more fresh inventory was arriving — a better setup for patience and comparison.

FOR SELLERS

New listings ran above normal while buyer follow-through weakened sharply. With active inventory also above trend, sellers faced more competition at the same time fewer buyers were moving forward. Price and presentation matter more in that setup.

"Expected" adjusts for normal seasonal change, so the report highlights what actually ran differently this month.

Where the Market Is Strongest and Weakest

This is not one market. Conditions change materially by price tier.

PRICE TIER	NEW VS EXPECTED	PENDING VS EXPECTED	MONTHS SUPPLY	LEVERAGE
<$399,999	**+61.5%**	**+44.4%**	5.8	BALANCED
$400–499k	−8.3%	−6.7%	3.3	SELLER
$500–599k	**−36.8%**	**−25.0%**	4.9	BALANCED
$600–699k	**+11.1%**	**+20.0%**	3.8	SELLER
$700–799k	−40.0%	+33.3%	5.8	BALANCED
$800–899k	0.0%	−100.0%	6.2	BUYER
$900–999k	0.0%	+100.0%	5.7	BALANCED
$1–2M	**−16.7%**	−100.0%	7.8	BUYER
$2M+	—	—	—	NO SALES

TIER TO WATCH

Under $399,999

PENDING	NEW LISTINGS	MONTHS SUPPLY
+44.4%	+61.5%	5.8
above normal	above normal	balanced

Both new listings and pending activity ran well above normal under $399k. Buyer demand is clearly active, but with 5.8 months of supply the tier remains Balanced rather than tight.

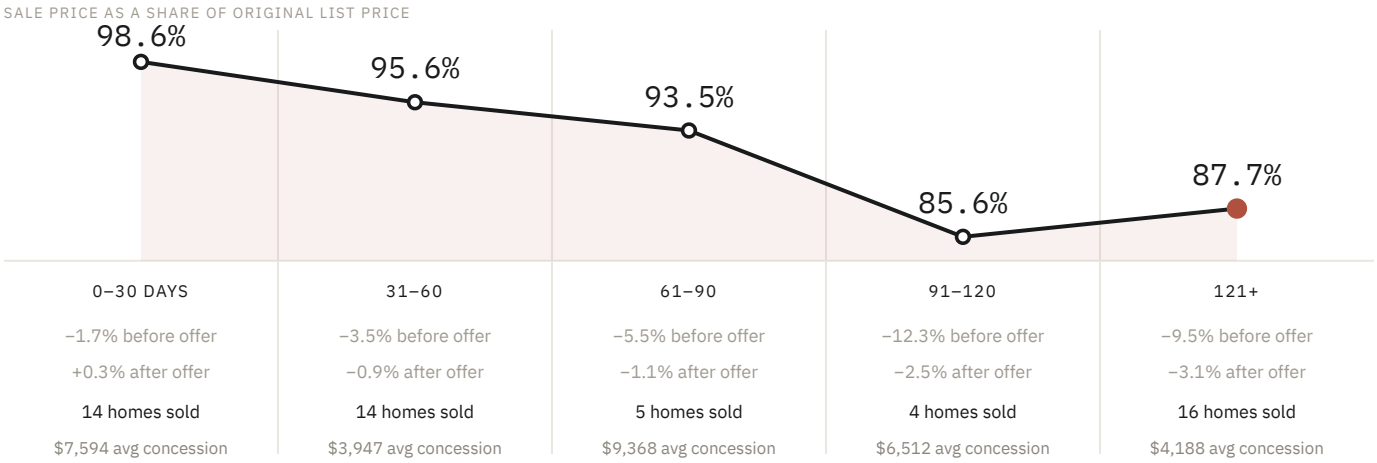
FOR BUYERS

The $500k–$599k tier softened, with both new listings and pending activity below normal. Above $800k, supply moved into Buyer territory, giving buyers more leverage than the overall Redmond market suggests.

FOR SELLERS

The $600k–$699k tier stood out with Seller leverage at 3.8 months of supply and pending activity 20% above normal. Under $399k also saw strong activity, but its 5.8 months of supply keeps conditions Balanced.

What Market Time Does to Pricing



Pricing gaps widened as market time increased. Homes finding a buyer within 30 days had been reduced just 1.7% before an offer, while the longest-sitting groups showed much deeper cuts — though the 91–120 day bucket is based on only four sales.

Even "fast" sales separate early

	0–7 DAYS	8–15	16–30
Sales	4	1	9
SP/OP	99.0%	100.0%	98.2%

Smaller samples can create short-term noise — 8–15 days is a single sale this month. The broader DOM buckets show the clearer trend.

Speed to contract by tier

<$399,999	BALANCED	3 in 10
$400–499k	SELLER	2 in 10
$500–599k	BALANCED	0 in 10
$600–699k	SELLER	3 in 10
$700–799k	BALANCED	3 in 10
$800–899k	BUYER	—
$900–999k	BALANCED	0 in 10
$1–2M	BUYER	—
$2M+	—	—

Listings pending within 14 days, out of every 10, in ascending price order. — means no pending sales to measure.

Leverage and speed were not the same thing. About 3 in 10 listings went pending within two weeks under $399k, in $600k–$699k and in $700k–$799k, even though two of those tiers were Balanced and one favored sellers.

FOR BUYERS

Homes finding a buyer within 30 days had been reduced just 1.7% before an offer. The 121+ day group had already been cut 9.5%, giving buyers more room on listings that had been sitting.

FOR SELLERS

Early positioning protected more of the original price. Homes finding a buyer within 30 days closed at 98.6% of original list price, compared with 87.7% for the 121+ day group.

What to Watch Next

MEDIAN DIRECTION

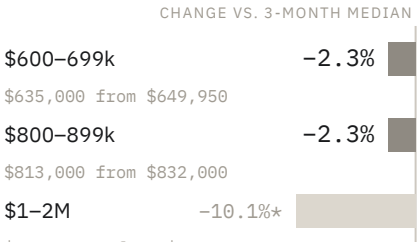
Mid-tier

PENDING MEDIAN POSITION

Pending's median price is currently around **$467,900** — about 68% of the way through the $400–499k range.

Redmond's median sits comfortably inside the $400k–$499k tier, not near an edge — no tier-crossing concern this month.

PRICE MOVEMENT WORTH WATCHING



*Redmond's overall sales volume is lower than Bend's this month, so several of these moves — $1–2M especially, which sold on only a handful of homes — should be read with more caution than the same-size move would warrant in a higher-volume tier.

SIGNALS INTO NOVEMBER

01 Whether October's Pending slowdown — 26.1 points below normal — continues into November.

02 Whether strong activity under $399k continues, where both new listings and pending contracts finished well above normal.

03 Whether the $600k–$699k tier stays tight, with Seller leverage at 3.8 months and pending activity running above trend.

NEW CONSTRUCTION COMPETITION

TRAILING 3 MONTHS · AUG–OCT 2026

NEW-BUILD MEDIAN
$433,275

RESALE MEDIAN
$500,000

NEW-BUILD DISCOUNT
−13.3%
in line with recent months

HEAVIEST NEW-BUILD SHARE
<$399,999 · 27%
$400–499k · 25%

FOR BUYERS

New construction sold at a 13.3% lower median than resale over the last three months. With builders making up roughly a quarter of sales below $500k, buyers in Redmond's core price ranges should compare new and resale directly.

FOR SELLERS

Resale sellers below $500k face the most direct competition from builders. New construction made up 27% of sales under $399k and 25% in $400k–$499k, while carrying a lower median price overall.

Sisters

Market direction

October 2026

Where buyers and sellers have leverage right now

Buyer activity rebounded sharply in October. Pending contracts ran nearly 60 points above normal while new listings also increased, but with 8.1 months of supply the market still favored buyers overall.

MEDIAN SOLD PRICE

$736,000

−20.2% year over year

MEDIAN DAYS ON MARKET

32 days 69 days in September

ABSORPTION RATE

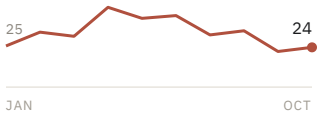
8.1 months 8.4 months in September

NEW LISTINGS

+14.3%

Expected −19.1%

+33.4% vs norm



24 this Oct · +9.1% vs 2025

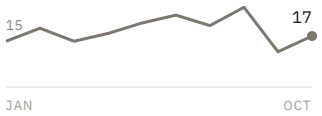
+84.6% vs 2024

PENDING

+54.5%

Expected −5.2%

+59.7% vs norm



17 this Oct · +183.3% vs 2025

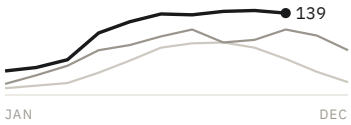
−10.5% vs 2024

ACTIVE

−2.8%

Expected −4.4%

+1.6% vs norm



139 this Oct · +15.8% vs 2025

+61.6% vs 2024

SPARKLINES: MONTHLY VOLUME · NEW AND PENDING 2026; ACTIVE 2024–2026

FOR BUYERS

Buyer activity improved sharply, but Sisters still carried more than eight months of supply. Buyers had more competition than in September, yet the market remained loose enough to stay selective.

FOR SELLERS

Pending activity ran well above normal, a clear improvement in buyer follow-through. But new listings also increased and overall supply stayed high, so sellers should view October as a stronger month — not yet a full shift in leverage.

"Expected" adjusts for normal seasonal change, so the report highlights what actually ran differently this month.

Price Points to Watch

TOP MOVERS

TIER	SOLD MED. PRICE CURRENT	3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
1–2 million	$1,550,000	$1,362,500	+13.8%	8.9	BUYER
$600,000–$699,999	$635,000	$641,000	−0.9%	3.8	SELLER
$700,000–$799,999	$747,000	$767,500	−2.7%	10.3	BUYER

BOTTOM MOVERS

TIER	SOLD MED. PRICE CURRENT	3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
$500,000–$599,999	$524,900	$544,950	−3.7%	5.2	BALANCED
<$499,999	$431,812	$474,000	−8.9%	8.9	BUYER
$800,000–$899,999	$780,000	$875,000	−10.9%	11.4	BUYER

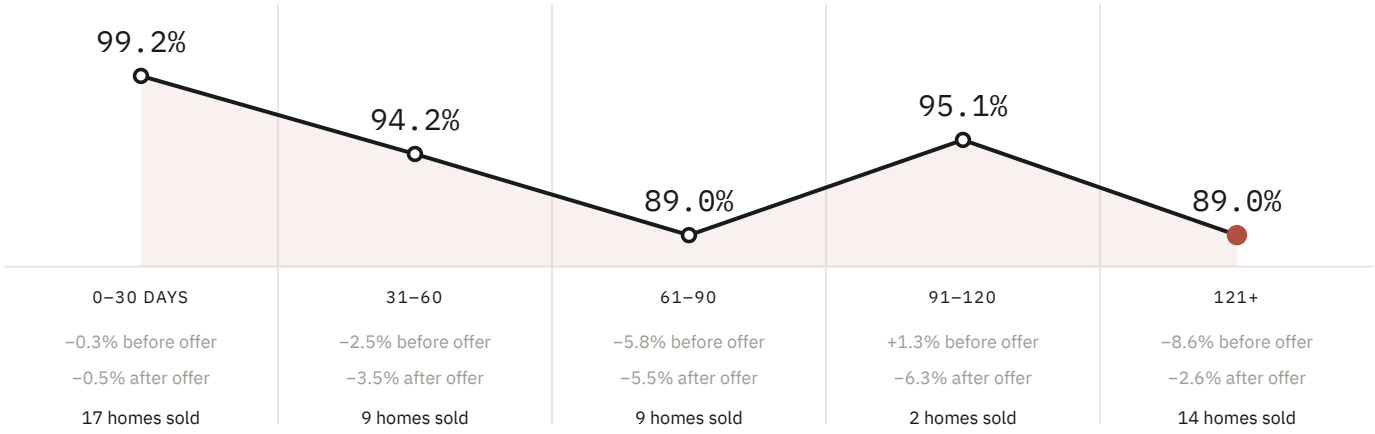
Sisters remains highly uneven by price. The $600k–$699k tier is the only Seller-leverage range this month, while most higher and lower tiers still carry Buyer-level supply.

Tiers with no sale this month aren't shown above. Small sample sizes can move tier medians sharply.

What Market Time Does to Pricing

TRAILING 3 MONTHS · AUG–OCT 2026 · N=51

SALE PRICE AS A SHARE OF ORIGINAL LIST PRICE



Homes finding a buyer within 30 days closed at 99.2% of original list price, compared with 89.0% for the 121+ day group. The 91–120 day bucket is only two sales, so treat that rebound cautiously.

FOR BUYERS

Buyer leverage is strongest in the higher-supply tiers. $800k–$899k carries 11.4 months of supply and also posted the largest price pullback this month, giving buyers meaningful room to negotiate.

FOR SELLERS

The $600k–$699k tier is Sisters' strongest seller position at 3.8 months of supply. Most other price ranges remain buyer-favored, so sellers should not assume October's stronger pending activity applies evenly across the market.

La Pine

Market direction

October 2026

Where buyers and sellers have leverage right now

Buyer activity slowed sharply in October while inventory stayed close to its seasonal path. With 8.2 months of supply, La Pine remained firmly buyer-favored.

MEDIAN SOLD PRICE

$385,000

−1.3% year over year

MEDIAN DAYS ON MARKET

80 days 53 days in September

ABSORPTION RATE

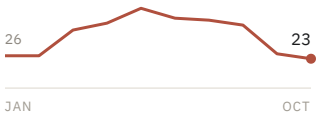
8.2 months 8.9 months in September

NEW LISTINGS

−20.7%

Expected −16.5%

−4.2% vs norm



23 this Oct · −47.7% vs 2025

−20.7% vs 2024

PENDING

−32.1%

Expected −8.7%

−23.5% vs norm

19 this Oct · −29.6% vs 2025

−20.8% vs 2024

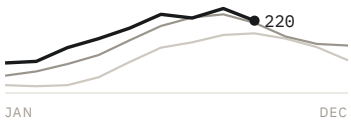
ACTIVE

2024 2025 2026

−7.2%

Expected −6.3%

−0.9% vs norm



220 this Oct · +15.8% vs 2025

+18.3% vs 2024

SPARKLINES: MONTHLY VOLUME · NEW AND PENDING 2026; ACTIVE 2024–2026

FOR BUYERS

Pending activity ran 23.5 points below normal while inventory stayed near its seasonal path. Buyers had less competition without losing much choice, reinforcing the leverage already shown by 8.2 months of supply.

FOR SELLERS

The bigger concern for sellers was weaker buyer follow-through, not rising inventory. Pending activity fell well below normal while supply remained elevated, so pricing to current competition matters more than waiting for demand to improve.

"Expected" adjusts for normal seasonal change, so the report highlights what actually ran differently this month.

Price Points to Watch

TOP MOVERS

TIER	SOLD MED. PRICE CURRENT	SOLD MED. PRICE 3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
$600,000–$699,999	$660,500	$605,000	+9.2%	16.0	BUYER
$400,000–$499,999	$444,000	$430,000	+3.3%	11.4	BUYER
< $299,999	$245,000	$245,000	0.0%	4.4	BALANCED

BOTTOM MOVERS

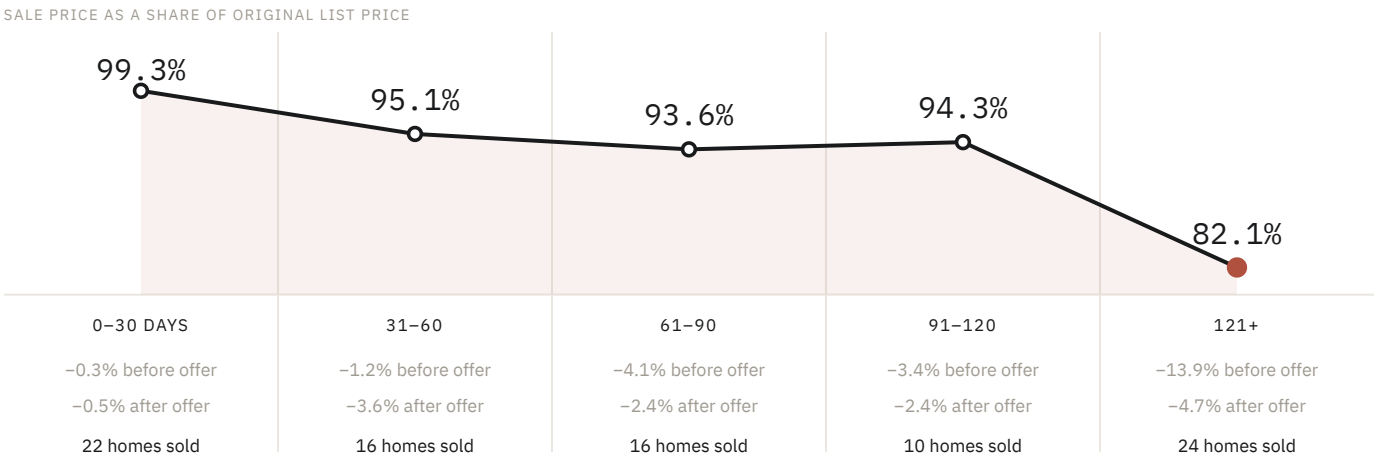
TIER	SOLD MED. PRICE CURRENT	SOLD MED. PRICE 3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
$300,000–$399,999	$350,000	$352,450	−0.7%	4.2	BALANCED
$500,000–$599,999	$520,000	$529,000	−1.7%	10.9	BUYER

La Pine's leverage changes sharply around $400k. The two lowest price ranges remain Balanced, while every tier from $400k–$699k carries more than 10 months of supply and clearly favors buyers.

Tiers with no sale this month aren't shown above.

What Market Time Does to Pricing

TRAILING 3 MONTHS · AUG–OCT 2026 · N=88



The pricing gap widened sharply for La Pine's longest-sitting listings. Homes taking 121+ days had already been reduced 13.9% before an offer and ultimately closed at 82.1% of original list price.

FOR BUYERS

Above $400k, buyers have substantial room. The $600k–$699k tier carries 16 months of supply, so its 9.2% median increase is better read as a thin-sample move than a loss of buyer leverage.

FOR SELLERS

The $300k–$399k tier is La Pine's tightest price range at 4.2 months of supply. Above $400k, conditions loosen sharply, so sellers need to price much more carefully as they move up the market.

Crook County

Market direction

October 2026

Where buyers and sellers have leverage right now

Buyer activity softened in October while new listings ran well above normal. Inventory also stayed above trend, leaving Crook County firmly buyer-favored at 8.5 months of supply.

MEDIAN SOLD PRICE

$414,900

−15.7% year over year

MEDIAN DAYS ON MARKET

72 days 84 days in September

ABSORPTION RATE

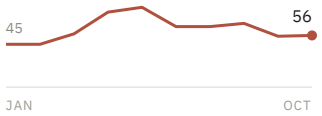
8.5 months 8.4 months in September

NEW LISTINGS

−1.8%

Expected −18.6%

+16.8% vs norm



56 this Oct · +33.3% vs 2025

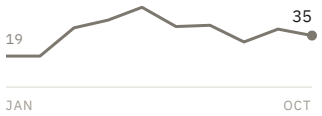
+30.2% vs 2024

PENDING

−12.5%

Expected +4.4%

−16.9% vs norm



35 this Oct · −12.5% vs 2025

+2.9% vs 2024

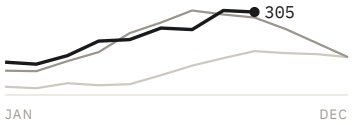
ACTIVE

2024 2025 2026

−1.3%

Expected −3.6%

+2.3% vs norm



305 this Oct · +12.5% vs 2025

+36.8% vs 2024

SPARKLINES: MONTHLY VOLUME · NEW AND PENDING 2026; ACTIVE 2024–2026

FOR BUYERS

Pending activity fell below normal while new listings ran well above trend. More homes were coming to market without a matching pickup in contracts, giving buyers more choice and less competition.

FOR SELLERS

The challenge for sellers was weaker buyer follow-through at the same time more new listings were arriving. With 8.5 months of supply, sellers still needed to compete hard on price and presentation.

"Expected" adjusts for normal seasonal change, so the report highlights what actually ran differently this month.

Price Points to Watch

TOP MOVERS

TIER	SOLD MED. PRICE CURRENT	3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
< $299,999	$212,000	$200,000	+6.0%	4.9	BALANCED
$600,000–$699,999	$659,950	$635,000	+3.9%	6.4	BUYER
$900,000–$999,999	$937,000	$950,000	−1.4%	12.0	BUYER

BOTTOM MOVERS

TIER	SOLD MED. PRICE CURRENT	3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
$400,000–$499,999	$417,500	$447,000	−6.6%	6.8	BUYER
$500,000–$599,999	$514,900	$559,000	**−7.9%**	7.0	BUYER
$800,000–$899,999	$750,000	$853,000	**−12.1%**	11.3	BUYER

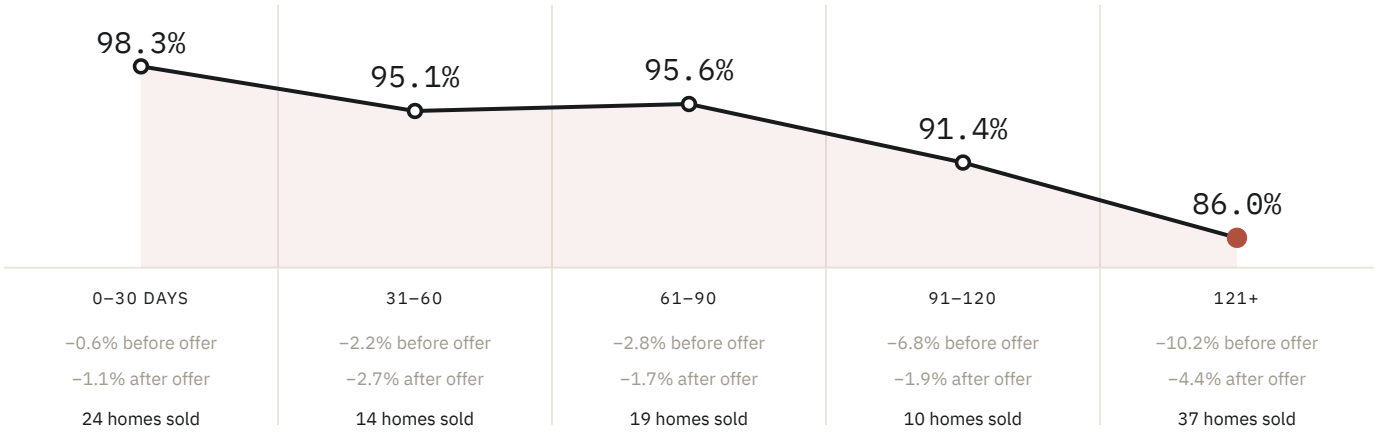
Most Crook County price ranges still favor buyers. The under-$300k tier is the exception at 4.9 months of supply, while several mid- and upper-price tiers carry seven to twelve months of inventory.

Tiers with no sale this month aren't shown above.

What Market Time Does to Pricing

TRAILING 3 MONTHS · AUG–OCT 2026 · N=104

SALE PRICE AS A SHARE OF ORIGINAL LIST PRICE



Pricing gaps widened with market time. More than a third of trailing sales took 121+ days to find a buyer, and that group had already reduced 10.2% before an offer.

FOR BUYERS

The $500k–$599k and $800k–$899k tiers both softened while carrying seven or more months of supply, giving buyers meaningful room to negotiate.

FOR SELLERS

The under-$300k tier remains Crook County's tightest price range at 4.9 months of supply. Above that, most tiers remain buyer-favored, so sellers should not read isolated price gains as broader market strength.

Jefferson County

Market direction

October 2026

Where buyers and sellers have leverage right now

Buyer activity slowed in October while new listings and active inventory also pulled back. Despite fewer homes on the market, Jefferson County still leaned toward buyers at 6.5 months of supply.

MEDIAN SOLD PRICE

$399,000

+6.4% year over year

MEDIAN DAYS ON MARKET

78 days 60 days in September

ABSORPTION RATE

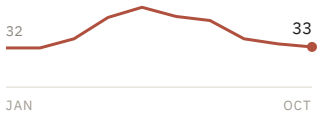
6.5 months 7.0 months in September

NEW LISTINGS

−13.2%

Expected −1.2%

−12.0% vs norm



33 this Oct · −25.0% vs 2025

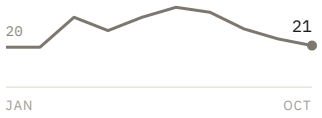
−5.7% vs 2024

PENDING

−12.5%

Expected +8.5%

−21.0% vs norm



21 this Oct · −27.6% vs 2025

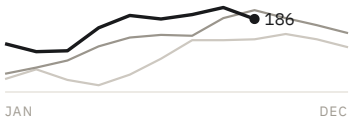
−22.2% vs 2024

ACTIVE

−7.5%

Expected −1.6%

−5.9% vs norm



186 this Oct · −0.5% vs 2025

+10.1% vs 2024

SPARKLINES: MONTHLY VOLUME · NEW AND PENDING 2026; ACTIVE 2024–2026

FOR BUYERS

Pending activity fell 21 points below normal while active inventory also declined faster than usual. Buyers faced less competition, but also somewhat less choice — a slower market rather than a surge in leverage from rising supply.

FOR SELLERS

Closed sales ran well above normal, but that likely reflects contracts written earlier rather than stronger current demand. With pending activity now below trend, sellers should watch the November pipeline more closely than October closings.

"Expected" adjusts for normal seasonal change, so the report highlights what actually ran differently this month.

Price Points to Watch

TOP MOVERS

TIER	SOLD MED. PRICE CURRENT	SOLD MED. PRICE 3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
$300,000–$399,999	$372,950	$346,450	+7.6%	3.3	SELLER
< $299,999	$250,000	$254,900	−1.9%	4.4	BALANCED
$600,000–$699,999	$663,500	$684,995	−3.1%	10.2	BUYER

BOTTOM MOVERS

TIER	SOLD MED. PRICE CURRENT	SOLD MED. PRICE 3-MON MED.	CHANGE	MO. SUPPLY	LEVERAGE
$500,000–$599,999	$500,000	$517,500	−3.4%	9.1	BUYER
$400,000–$499,999	$425,000	$439,900	−3.4%	7.4	BUYER

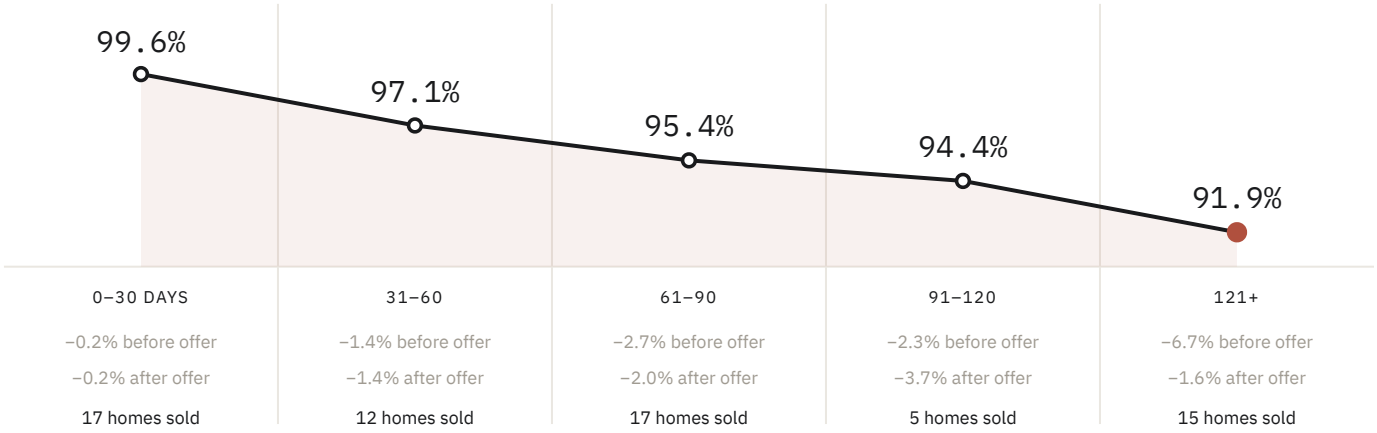
Jefferson County changes sharply by price. The $300k–$399k tier still favors sellers at just 3.3 months of supply, while every tier from $400k–$699k carries Buyer-level inventory.

Tiers with no sale this month aren't shown above.

What Market Time Does to Pricing

TRAILING 3 MONTHS · AUG–OCT 2026 · N=66

SALE PRICE AS A SHARE OF ORIGINAL LIST PRICE



Jefferson County showed the shallowest pricing gaps of the six markets. Even homes taking 121+ days had been reduced only 6.7% before an offer, leaving less negotiating room from market time alone.

FOR BUYERS

The $400k–$599k range offered the clearest buyer room. Both tiers softened about 3.4% against their trailing medians and carried more than seven months of supply.

FOR SELLERS

The $300k–$399k tier remains Jefferson County's strongest seller position, with 3.3 months of supply and the largest positive price move this month. Above $400k, conditions loosen quickly.

Reading This Report

Four definitions behind every figure in this brief, and the limits worth knowing before acting on them.

ACTUAL VS EXPECTED

Compares current monthly movement with the normal seasonal change for that month, so a figure reads as unusual rather than merely up or down. A few tiers in a given market rarely see any activity at all — for those, the table shows the raw count instead of a percentage, since there's no typical baseline to measure against.

LEVERAGE

Under 4 months	Seller
4 – 6 months	Balanced
Over 6 months	Buyer

SP/OP

Final sale price ÷ original list price — the total difference between original list price and final sale price, incorporating both pre-offer price reductions and post-offer negotiation.

WORTH WATCHING

Only movements large enough to cross the report's significance threshold, and backed by enough real sales to trust the number, are surfaced — so the page shows what changed rather than everything measured, or noise from a handful of sales.

DATA SCOPE

Homes (including manufactured homes on land), townhomes, and condos only. Land, farms, manufactured homes in rented-lot parks, multifamily, and commercial properties are excluded, so totals may differ from the official MLS Market Summary. The same criteria apply to every market in this report.

ON SAMPLE SIZE

Tiers above $2M close only a handful of homes in a month, so their medians and speed figures can swing sharply on a single sale. Read them as direction rather than measurement, and expect month-to-month volatility that does not indicate a trend. The same caution applies to any sub-bucket in this report with fewer than roughly 25 sales.

WHY THIS MATTERS

The goal is not to report every number. It is to identify where conditions are changing enough to affect buyer or seller decisions.

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