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Lake Nona Area 13 Month Market Review from 1st July 2025 through 31st July 2026

Lake Nona Area · Orlando, FL

Report period: July 1, 2025 – July 31, 2026

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CENTRAL CONCLUSION

The Lake Nona Area is not a single uniform market. Buyer depth, time on market, negotiating leverage, and the probability of sale change materially as price increases.

Across the reporting period, 645 single-family homes closed. The August 26, 2026 snapshot shows 229 active listings and 70 pending. The overall sale-to-list ratio was 97.0%, but that average conceals a clear divide: homes below $1 million generally experienced stronger absorption and tighter sale-to-list ratios, while the market above $2 million became progressively thinner and more price-sensitive.

COMMUNITY SNAPSHOT

645 Real Buyers	**229** Current listings	**70** Pending listings
5.0 Approx. months of supply overall	**89.0** Weighted average days on market	**96.9%** Sale price / list price

Executive Summary

This review covers single-family homes in the Lake Nona Area from July 1, 2025 through July 31, 2026, with active and pending inventory measured as of August 26, 2026.

During the reporting period, 645 homes sold at an average price of $954,041 and a median price of $755,000. The average sold price per square foot was $302, the average days on market was 88.6 days, and closed properties achieved an average of 97.0% of list price.

Most completed transactions occurred below $2 million. Of the 645 closed sales, 474 were below $1 million, and another 138 were between $1 million and $1,999,999. Only 33 sales occurred at $2 million or above.

That distribution matters. Lake Nona supports transactions across a very wide range of values, including eight-figure inventory, but the number of actual buyers declines sharply at the upper end. Higher-priced homes therefore require more disciplined positioning, greater differentiation, and a marketing strategy built around the specific buyer rather than broad exposure alone.

Market Signal in Plain English

The market is active, but buyer leverage increases with price.

Below $500,000, the data shows 2.2 months of supply and a 45.8% absorption rate. Between $500,000 and $999,999, supply increases to 4.5–4.9 months, but transaction volume remains substantial.

The $1 million to $1,999,999 bracket moves to 5.5 months of supply. That is still a functioning market, with 138 closed sales and 21 properties pending, but buyers have more room to compare alternatives and negotiate.

Above $2 million, the structure changes. Supply reaches 10.2 months between $2 million and $3,999,999 and 11.6 months between $4 million and $5,999,999. From $6 million to $7,999,999, only one sale closed during the period, producing 41.9 months of calculated supply.

The signal is not that upper-end homes cannot sell. They do. The signal is that the margin for weak positioning shrinks as the buyer pool narrows.

Market Snapshot by Price Band

$0–$499,999: This was the most liquid bracket by supply. There were 64 closed sales, 10 active listings, and 4 pending properties. Months of supply were 2.2, with a 45.8% absorption rate. Closed homes averaged 96.4% of list price.

$500,000–$749,999: This was the largest transaction segment, with 247 closed sales. There were 79 active and 28 pending listings. Supply was 4.5 months, and closed properties averaged 97.8% of list price.

$750,000–$999,999: There were 163 sales, 57 active listings, and 11 pending properties. Supply was 4.9 months. Sold homes averaged 94.0 days on market and achieved 97.6% of list price.

$1,000,000–$1,999,999: Activity remained meaningful, with 138 sales and 21 pending properties, but competition increased. There were 54 active listings, supply measured 5.5 months, and the average sale-to-list ratio declined to 95.3%.

$2,000,000–$3,999,999: Buyer depth narrowed considerably. There were 26 sales against 19 active listings and 3 pending properties. Months of supply reached 10.2, absorption was 9.8%, and closed homes averaged 93.9% of list price.

$4,000,000–$5,999,999: Six homes sold during the period, with 5 active and 1 pending at the snapshot date. Supply measured 11.6 months. The small number of transactions means individual property differences strongly affect the statistics.

$6,000,000–$7,999,999: Only one sale closed, at $6.6 million. Three properties were active and one was pending. The calculated 41.9 months of supply reflects an exceptionally thin transaction pool and should not be interpreted like a conventional lower-price market.

$8,000,000–$9,999,999: One property was active and there were no pending or closed sales in the reporting data. Insufficient transaction evidence exists to establish reliable broader pricing behavior for this bracket.

$10,000,000+: One property was active, and one was pending as of August 26, with no closed sales during the reporting period. The pending list price is not a closed sale and should not be treated as evidence of final market value.

Pricing Behavior and Buyer Resistance

The clearest pricing signal is the widening gap between seller expectations and completed transactions as values rise.

From $500,000 through $999,999, closed homes averaged approximately 97.6%–97.8% of list price. Between $1 million and $1,999,999, that declined to 95.3%. From $2 million to $3,999,999, it fell to 93.9%, while the $4 million to $5,999,999 bracket averaged 94.6%.

The $6 million to $7,999,999 bracket recorded an 88.0% sale-to-list ratio, although that result is based on only one closed transaction and should not be generalized.

Days on market reinforce the same issue. Active inventory averaged 120.8 days from $750,000 to $999,999, 153.1 days from $1 million to $1,999,999, and 175.5 days from $2 million to $3,999,999. In the $6 million to $7,999,999 bracket, active inventory averaged 269.3 days.

Price is not simply a number assigned to a property. It determines competitive position. When buyers have alternatives, an asking price that gets too far ahead of the available evidence often results in additional market time before the seller ultimately negotiates back toward where demand exists.

Advice by Price Bracket

Below $500,000, current supply indicates comparatively strong liquidity. That does not justify aggressive overpricing. Stronger demand is most useful when the property enters the market in a position buyers can immediately support.

From $500,000 to $999,999, transaction volume is substantial, but so is competing inventory. Presentation, condition, community, lot, upgrades and price all affect which homes buyers select. Pricing should be established against the alternatives buyers can purchase now, not simply prior sales.

From $1 million to $1,999,999, the market becomes more selective. With 5.5 months of supply and a 95.3% average sale-to-list ratio, sellers should expect buyers to compare carefully and negotiate when the value proposition is not clear.

From $2 million to $3,999,999, 10.2 months of supply changes the strategy. A home needs a defensible price, a clear reason for the target buyer to prefer it, and marketing built around that buyer. Simply increasing exposure does not solve weak positioning.

From $4 million to $5,999,999, transaction evidence becomes limited. Six sales during the reporting period mean broad averages should give way to detailed property-by-property analysis.

At $6 million and above, the market is too thin for simple statistical pricing. Individual property attributes, direct alternatives, buyer motivation and recent transaction evidence become more important than area-wide averages. The $8 million and higher brackets have insufficient closed-sale evidence in this reporting period to support broad conclusions.

What Homeowners Should Know Before Listing

The first question is not, “What is the average Lake Nona home selling for?” The useful question is, “What will buyers compare this particular home against?”

Lake Nona encompasses materially different communities, property types within the single-family category, levels of finish, lot characteristics, and price points. A $700,000 home and a $5 million home may share the same broader geographic label while operating in completely different competitive markets.

Before listing, the property should therefore be evaluated against its direct alternatives: recent relevant sales, current competing inventory, pending activity where useful, condition, presentation, and the attributes that create or reduce buyer preference.

Identify the likely buyer before building the marketing. That means understanding the property's use case, financial threshold, likely geographic source markets, search behavior, and the features most likely to create preference. The objective is not more marketing. It is qualified demand and stronger negotiating leverage.

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Recommended Listing Approach

A disciplined Lake Nona listing strategy should begin narrowly and expand outward.

First, establish the property's true competitive market rather than relying on the broader Lake Nona Area average. Identify the relevant community, price bracket, recent comparable sales, and the active properties a buyer will see as alternatives.

Second, determine the property's position within that set. Price, presentation, and messaging should make the reason to choose the home immediately understandable.

Third, define the most probable buyer profile and build the marketing around that audience. MLS and major property portals provide distribution. They are not the complete strategy. Listing assets, paid targeting, direct outreach, agent activation, and follow-up should all support the same positioning.

Finally, treat early market response as evidence. Review showing activity, buyer objections, competitive changes, and offer behavior objectively. If the market is rejecting the position, accumulating additional days on market rarely improves leverage. Adjust the strategy while the listing can still command attention.

MARKET FIGURES

Figure 1. Real buyer activity and inventory by price band

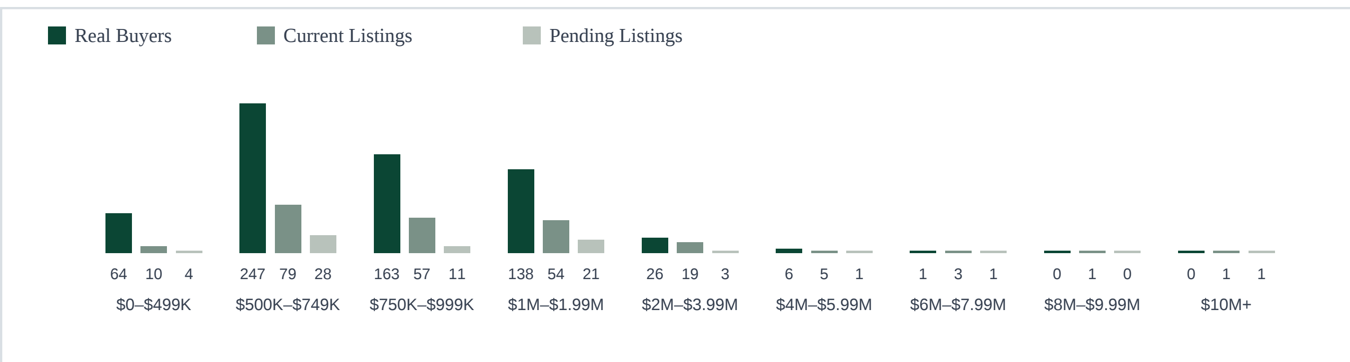


Figure 2. Market-time signals by price band

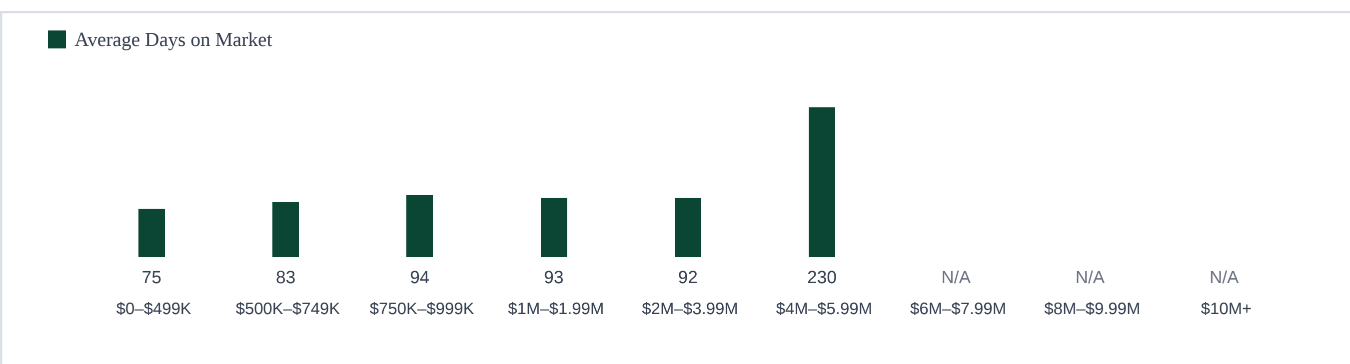


Figure 3. Pricing performance by price band

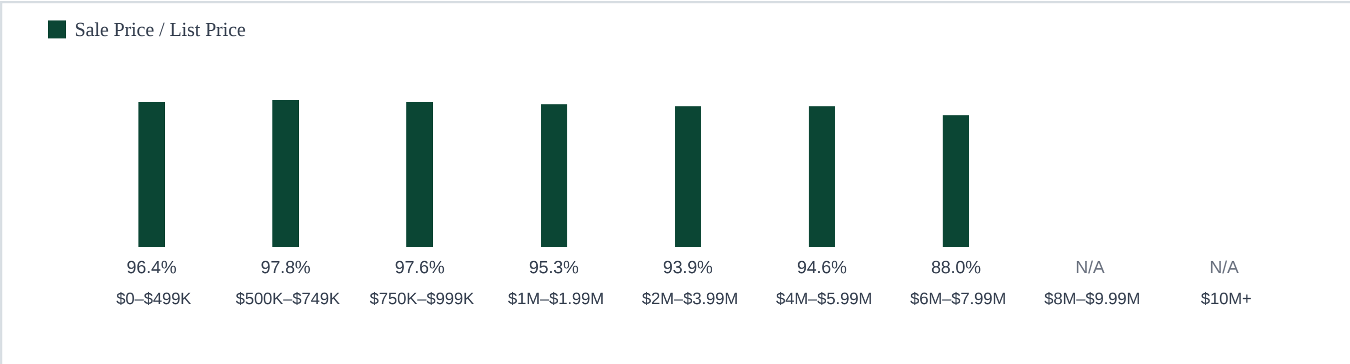
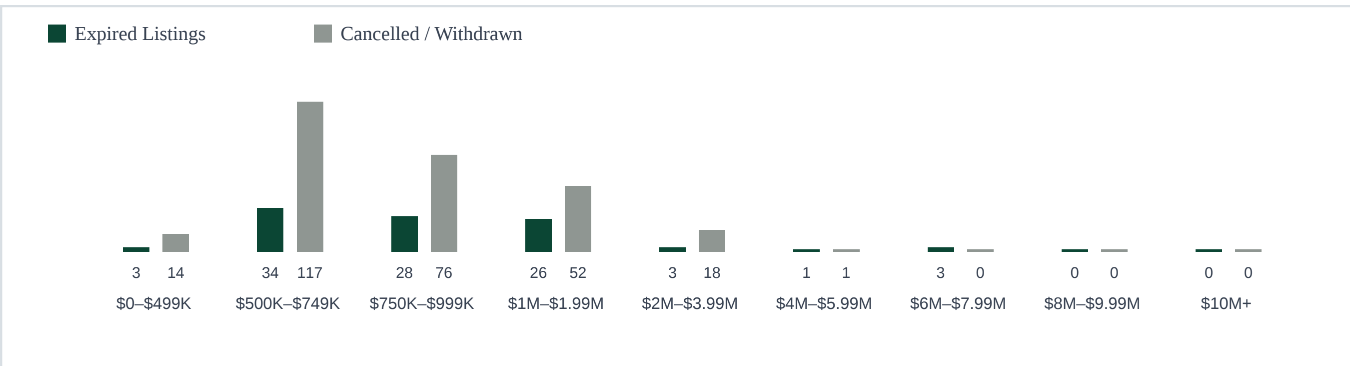


Figure 4. Listing risk signals by price band



PRICE BAND TABLE

BAND	CLOSED	ACTIVE	PENDING	AVG DOM	AVG SALE
$0 - $499,999	64	10	4	75	$454,063
$500,000 - $749,999	247	79	28	83	$632,912
$750,000 - $999,999	163	57	11	94	$858,581
$1,000,000 - $1,999,999	138	54	21	93	$1,347,699
$2,000,000 - $3,999,999	26	19	3	92	$2,699,994
$4,000,000 - $5,999,999	6	5	1	230	$4,539,340
$6,000,000 - $7,999,999	1	3	1	—	$6,600,000
$8,000,000 - $9,999,999	0	1	0	—	—
$10,000,000+	0	1	1	—	—

Data Notes and Limitations

This report covers single-family homes in the Lake Nona Area from July 1, 2025 through July 31, 2026, using StellarMLS market data. Active and pending counts are a point-in-time snapshot as of August 26, 2026; they are not counts of every property that was active or pending throughout the 13-month period.

The MLS market data includes 1,320 usable single-family residence records, including 645 closed sales. The report reflects one reporting period. No comparison period or separate historical Market Stats series was included, so the data should not be presented as evidence of a period-over-period trend.

The data spans multiple communities and market segments, and those submarkets can behave differently. At the highest price levels, transaction counts are also very small, so individual sales can materially affect averages and calculated supply.

This is a market report, not an appraisal. The section structure follows the standard nine-section neighborhood homeowner report format used in the saved report framework.

This report is a market update, not an appraisal. It should be used as a strategic planning document. A formal listing recommendation for an individual property requires a property-specific review, current condition assessment, competing inventory check, and buyer-profile strategy.

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