



AGENT MOVEMENT INDEX

FOURTH QUARTER 2025

Relitix's Agent Movement Index™ Closes 2025 With Ongoing Weakness in Agent Mobility, Though Regional Divergence Emerges



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- M & A targeting

LAKE GENEVA, WI - JANUARY 19, 2025 — Relitix's latest release of the Agent Movement Index™ (AMI) through fourth quarter 2025 confirms that the subdued agent mobility environment persisted through year-end, although significant regional variations have emerged. While national metrics remained below historical norms, the Midwest continues to outperform other regions, while the South and West experienced more pronounced declines.

KEY OBSERVATIONS FROM 4Q 2025:

- **National Trailing 12-Month Score Continues Decline:** The national trailing 12-month AMI ended December at 96.0, extending the downward trend observed throughout 2024 and into 2025. This metric has now remained below the 100 baseline for over a year, signaling sustained weakness in agent movement.
- **Regional Divergence Becomes More Pronounced:** The Midwest continues to significantly outperform other regions with a trailing 12-month score of 110.3, indicating relatively robust agent movement activity. In contrast, the South has dropped to 98.1, the West to 87.9, and the Northeast to 99.1—all reflecting varied market conditions across the country.
- **December Shows Typical Year-End Softness:** The monthly AMI value for December registered at 65.4, consistent with the seasonal pattern of reduced activity during the holiday period. The seasonally adjusted figure of 95.6 suggests the underlying trend remains below historical norms.

Full Online Release:

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- **Active Agent Pool Continues Gradual Erosion:** The national active agent index—measuring agents closing at least one transaction in the past year—finished December at 92.0, down from the 2021-2022 peaks. All regions experienced declines, with the West and Northeast seeing the steepest drops to 87.2 and 86.5 respectively.

"The fourth quarter data brings 2025 to a close with agent mobility still running below pre-pandemic norms," said Relitix Founder Rob Keefe. "What's particularly notable is the regional divergence we're now seeing. The Midwest has demonstrated remarkable resilience, maintaining elevated movement levels throughout the year, while the South and West have experienced more significant cooling. Brokerages operating across multiple regions will need to calibrate their recruitment and retention strategies accordingly."

REGIONAL HIGHLIGHTS:

The fourth quarter data reveals significant geographic variation in agent dynamics:

Midwest – Leading all regions with a trailing 12-month score of 110.3, the Midwest has maintained elevated agent movement despite national headwinds. Active agent levels remain relatively stable at 95.4.

South – After dramatic declines through 2024, the South's trailing 12-month score has stabilized near 98.1. The active agent pool remains at 95.5, the highest among all regions.

Northeast – The Northeast posted a trailing 12-month score of 99.1, hovering near the baseline. However, active agent levels have dropped more significantly to 86.5.

West – The West recorded the lowest trailing 12-month score at 87.9, reflecting continued challenging conditions. Active agents have also declined substantially to 87.2.

LOOKING AHEAD TO 2026:

Brokerage leaders should anticipate:

- **Continued Regional Variation** – The divergence observed in 2025 is likely to persist, requiring market-specific strategies rather than one-size-fits-all approaches to recruitment.
- **Potential for Stabilization** – With the industry now more than a year past the NAR settlement implementation, there are tentative signs that the disruption to normal agent movement patterns may be easing in some markets.
- **Active Agent Pool Monitoring** – The gradual decline in active agents bears watching, as it affects both the available recruitment pool and competitive dynamics.

The December AMI reading—encompassing the monthly score, seasonally adjusted index, and the trailing 12-month figures—provides vital intelligence for brokerage decision-makers as they finalize strategic plans for 2026.



AGENT MOVEMENT INDEX METRICS

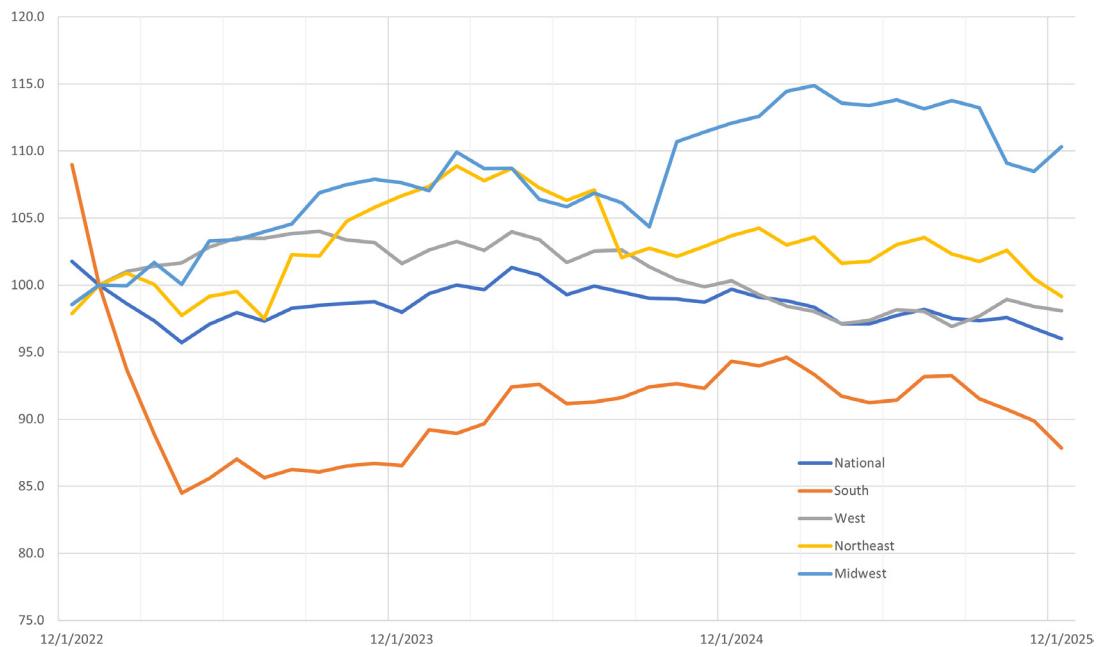
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TRAILING 12 MONTHS
FOURTH QUARTER 2025

 Relitix

Agent Movement Index - Trailing 12 Months



KEY OBSERVATIONS:

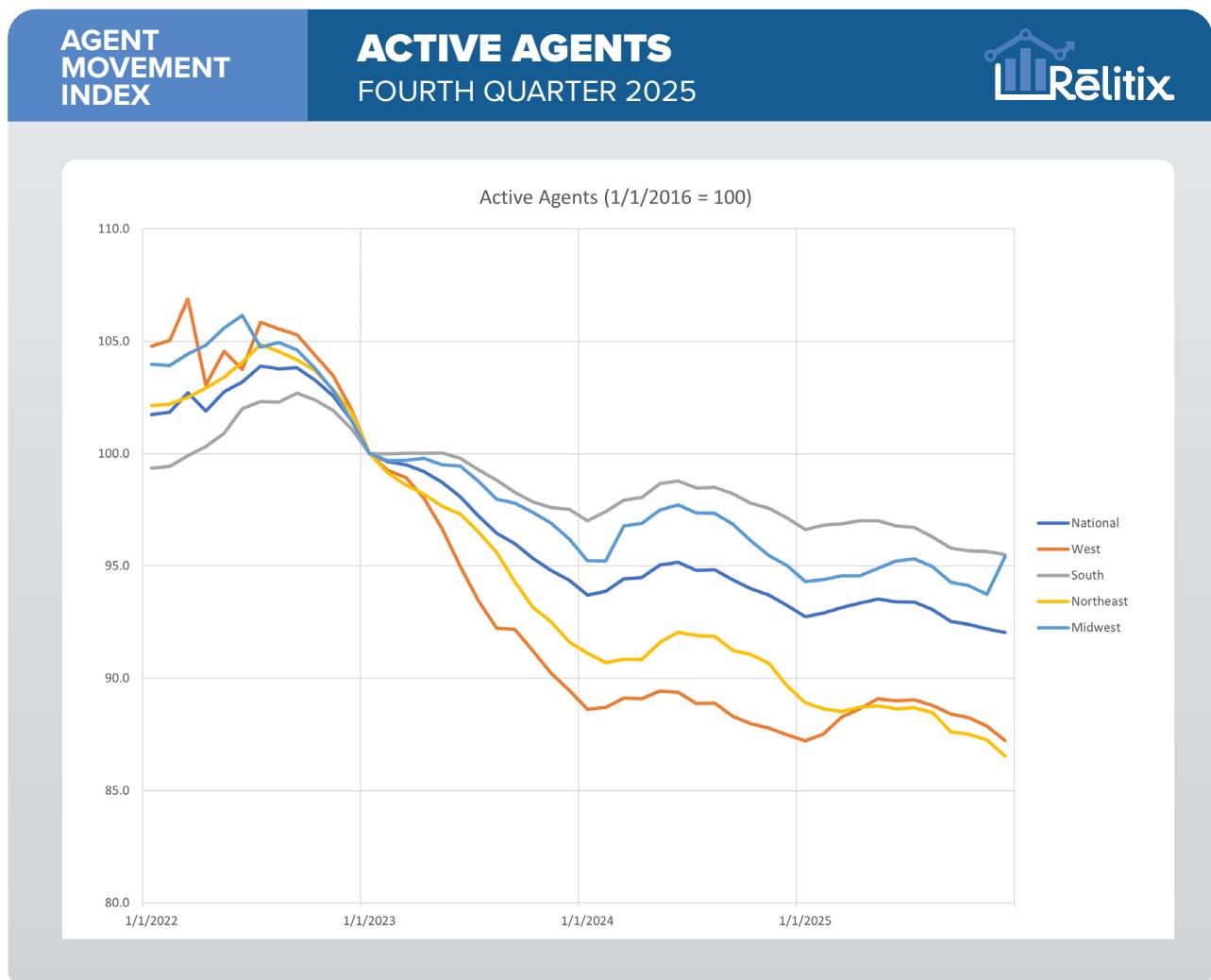


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WHAT IS THE AMI?

The AMI is a robust metric that tracks agent movement dynamics using extensive national data from major MLS systems. It is released monthly and includes both raw monthly figures and seasonally adjusted data to provide a transparent view of underlying trends.



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AGENT MOVEMENT INDEX

BACKGROUND



THE AGENT MOVEMENT INDEX™

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ABOUT OUR SCIENCE

The agent movement reflects the relative mobility of experienced agents between brokerages. The score is computed by estimating the number of agents who changed brokerages in a given month. To be counted the agent must be a member of one of the analyzed MLS's and change to a substantially different office name at a different address. M&A-driven activity and reflags are excluded as are new agents and agents who leave real estate. Efforts are made to exclude out of market agents and those which are MLS system artifacts. The number of agents changing offices is divided by the number of agents active in the past 12 months in the analyzed market areas. This percentage is normalized to reflect a value of 100 at the level of movement in January 2023 (0.7313%). The seasonally adjusted value divides the monthly result by the average of the same month in prior years.

Analyzed MLS's represent over 800,000 members from large and small MLS's throughout the United States. The data represents a significant sample in all NAR regions.

ABOUT RELITIX

Relitix provides data-driven decision support for brokerage leaders across the United States. A pioneer in applying AI and data science technology in brokerage management, Relitix profiles over 1.5 million agents in more than 130 markets nationwide to help brokers recruit, coach, and retain agents. Advanced data tools allow unprecedented visibility in agents, offices, and markets for strategic planning and M&A support.



RECRUIT | RETAIN | GROW