Golden Gate | Sotheby's INTERNATIONAL REALTY

Market Report

February 2025

SAN FRANCISCO BAY AREA

Cover Home:
465 Belvedere Ave, Belvedere
$29,900,000

The San Francisco Bay Area Housing Market

Welcome to our February Market Report for the San Francisco Bay Area, presented in partnership with the Rosen Consulting Group (RCG). For our statistical report of the regional housing market, we take a close look at the ten counties associated with the SF Bay Area. This report focuses primarily on detached single family homes, with added coverage of the significant condominium market in San Francisco. We also examine the regional luxury market. All data is sourced from local Multiple Listing Service (MLS) organizations.

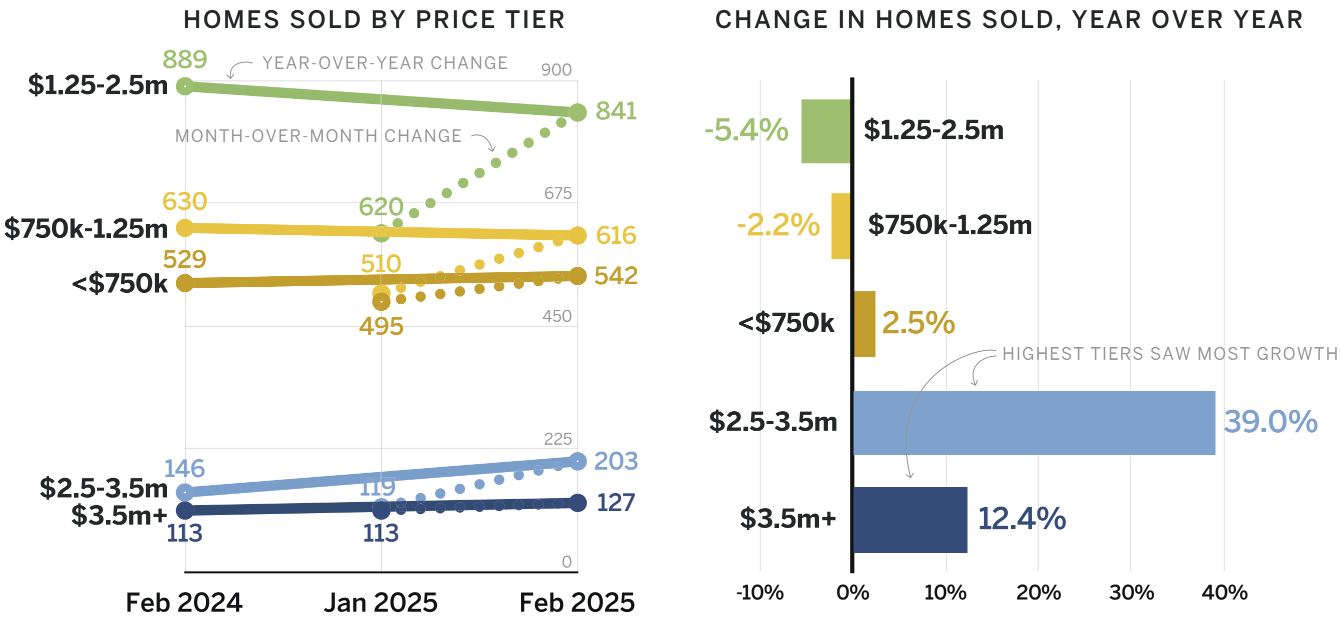
FORWARD MOMENTUM

The housing market in the Bay Area continued to gain momentum leading up to the spring buying season. Sales and pricing increased even as more homes came onto the market. The regional economy continued to support a strong base of housing demand, with thousands of new jobs and a tight labor market supporting strong income growth. On the other hand, mortgage rates remained elevated, which kept some buyers on the sidelines. However, some signs of improvement for rates and availability of mortgage loans could bring some of these buyers into the market in the coming months.

Active listings continued to increase in February with nearly 5,600 homes on the market. This was 1,000 more homes than the previous month and 1,700 more than last year. Potential buyers gained more options in nearly every part of the

High and Low Price Tiers See Increase in Activity, Year over Year

NUMBER OF SALES BY PRICE TIER · FEB 2024 VS. JAN 2025 VS. FEB 2025



Includes sales of Single Family Homes in 10 Bay Area counties. Data Source: MLS

Bay Area in February, but inventory increased the most in Alameda, Contra Costa, Sonoma and Napa counties, each growing by more than 50% year-over-year. Meanwhile, San Francisco was the only county with fewer homes on the market than last year.

Sales activity also increased and surpassed last year's levels. More than 2,300 homes sold in the Bay Area in February after increasing 25% year-over-year. However, the situation was bifurcated at the county level. There was an uptick in sales in relatively affordable parts of the Bay Area, including Sonoma and Solano counties. Conversely, fewer homes sold in San Francisco, San Mateo and Santa Clara counties; although, this was in part because sales activity was so strong last year.

UPPER PRICE TIER LEADS THE WAY

Higher priced home sales volume remained strong, while sales of relatively more affordable homes also improved. The number of homes sold for more than $2.5 million increased by 25% year-over-year to 300 sales, which accounted for nearly 15% of the regional total. Much of this increase was because of strong buyer activity in prime neighborhoods on the Peninsula. On the other end of the pricing spectrum, the number of homes sold for less than $1.25 million surged in more affordable parts of the Bay Area. Sales activity in Marin highlighted this bifurcation. In Marin County, nearly 100 homes sold in February, 16% more than last year. Most of the increase stemmed from a rise in sales in relatively affordable Novato even as sales in the higher priced cities of Mill Valley and Tiburon moved higher. Sales in Santa Cruz County decreased both month-over-month and year-over-year, the only county where this was the case.

COMPETITION CONTINUES IN SPITE OF HIGHER INVENTORY

Despite the growing number of homes for buyers to choose from, many sellers received multiple offers and homes sold quickly, especially in the Inner Bay Area. Nearly 60% of homes sold for more than the list price in the Bay Area. This share was more than three-fourths in San Francisco and Santa Clara counties and more than two-thirds in Alameda and San Mateo counties. Further highlighting the competition among buyers, homes that sold for more than the list price received 11% more on average. Notably, the average was much higher in San Francisco at 20%.

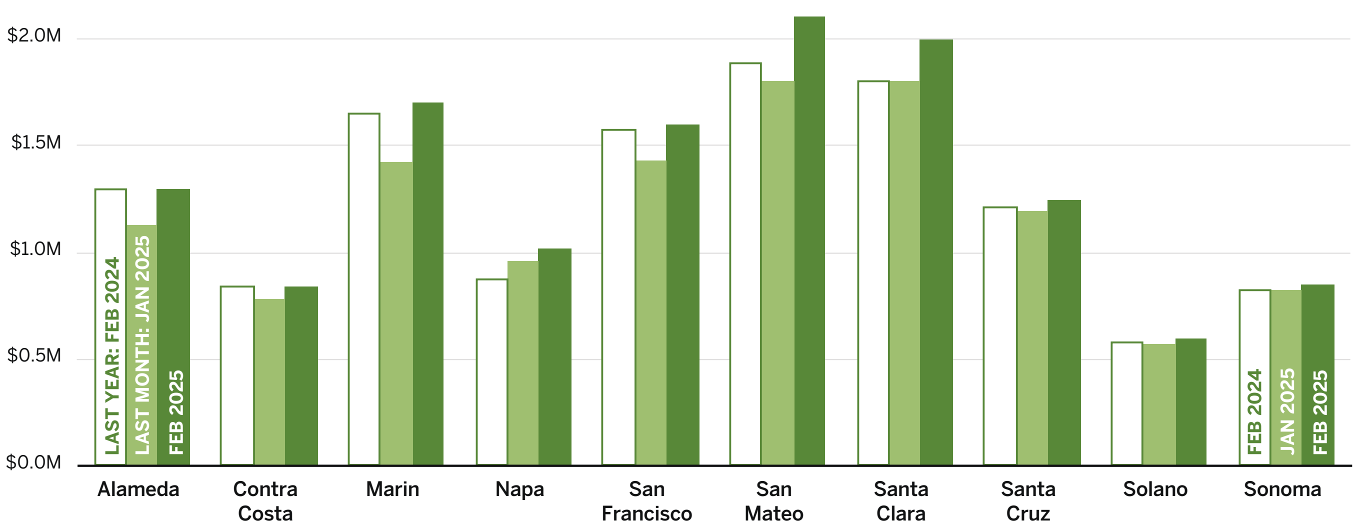
In addition to a majority of homes selling for more than the list price, homes spent approximately one month on the market, less time than in January. The average days on market remained less than three weeks in Alameda, San Mateo and Santa Clara counties. Highlighting demand in the luxury segment, homes priced at more than $2.5 million sold in 24 days on average, nearly a week less than last year.

LOOKING AHEAD

Overall, the market is poised for a strong spring, with potential for near-record median prices and more homes coming onto the market. Furthermore, improvement in buyer activity is broad-based across neighborhoods and price points. Accelerating hiring and decreasing mortgage rates would also support additional demand for single family homes. However, there is growing uncertainty of international migration to the Bay Area, a significant component of housing demand. While monitoring these developments remains important, recent trends highlight the resilient demand and growing optimism in the Bay Area housing market.

Price Growth Accelerates into Spring

MEDIAN PRICE BY COUNTY · FEB 2024 VS. JAN 2025 VS. FEB 2025



Includes Single Family Homes on Multiple Listing Services in 10 Bay Area counties. Data Source: MLS, RCG.

SALES BY COUNTY · SINGLE FAMILY HOMES

	Median Price			Avg. Price per Sq. Foot			Number of Sales		
County	Feb 2024	Feb 2025	Change	Feb 2024	Feb 2025	Change	Feb 2024	Feb 2025	Change
Alameda	$1,300,000	$1,300,000	0.0%	$770	$795	3.3%	440	450	2.3%
Contra Costa	$839,000	$839,500	0.1%	$548	$543	-1.0%	460	448	-2.6%
Marin	$1,650,000	$1,703,125	3.2%	$879	$926	5.4%	81	94	16.0%
Napa	$875,000	$1,018,500	16.4%	$649	$656	1.0%	53	48	-9.4%
San Francisco	$1,575,000	$1,600,860	1.6%	$970	$983	1.4%	141	138	-2.1%
San Mateo	$1,884,444	$2,107,500	11.8%	$1,126	$1,197	6.3%	210	198	-5.7%
Santa Clara	$1,800,000	$1,999,998	11.1%	$1,122	$1,223	9.1%	451	447	-0.9%
Santa Cruz	$1,215,000	$1,245,000	2.5%	$768	$853	11.1%	67	58	-13.4%
Solano	$580,500	$597,500	2.9%	$359	$365	1.9%	214	236	10.3%
Sonoma	$825,000	$850,000	3.0%	$542	$540	-0.5%	190	212	11.6%
SF Bay Area	**$1,250,000**	**$1,270,000**	**1.6%**	**$783**	**$811**	**3.6%**	**2307**	**2329**	**1.0%**

PRICES RISE ACROSS THE BAY AREA

Buyer demand and the strength of the luxury segment supported price appreciation across the region. The median sales price increased by nearly 10% in February to $1.27 million. While prices increased in all Bay Area counties, Napa led the region as the median sales price grew by 15% year-over-year to more than $1.0 million. Price growth also exceeded 10% in San Mateo and Santa Clara counties. Notably the median sales price in Santa Clara County was only 2% less than the record high, a sign that a new record is in sight during a time of year when prices are typically lower before building to spring and summer peaks.

SAN FRANCISCO BAY AREA COUNTIES

The Golden Gate Sotheby's International Realty statistical report of the regional housing market takes a close look at the ten counties associated with the SF Bay Area (we include Santa Cruz County, as it houses many SF Bay Area workers and is part of the area served by our agents). This report focuses primarily on detached single family homes, with added coverage of the significant condominium market in San Francisco. Data is sourced from local Multiple Listing Service (MLS) organizations. Written analysis is from the Rosen Consulting Group.

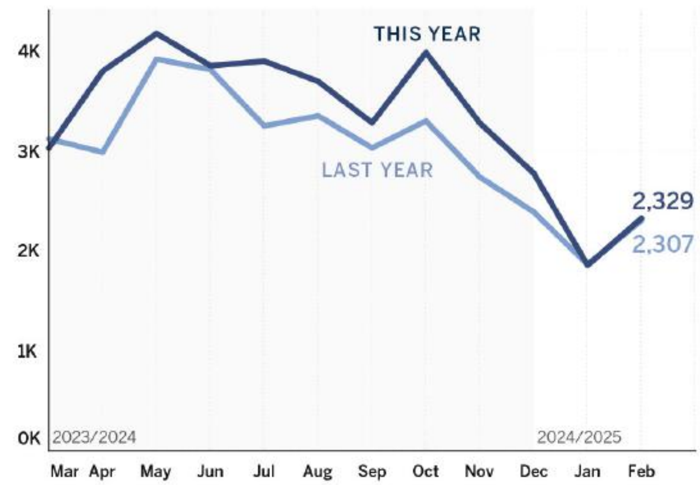
SAN FRANCISCO BAY AREA MARKET TRENDS

Graphs show trends in market activity for all single family homes sold in the 10 counties in the greater SF Bay Area, comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison.

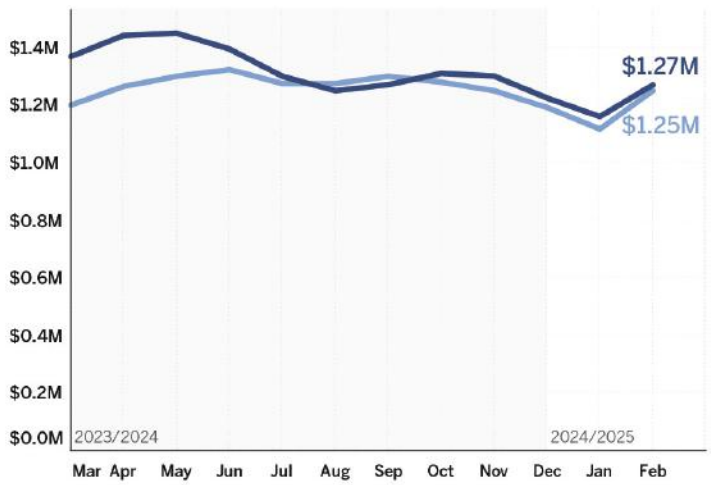
SAN FRANCISCO BAY AREA SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

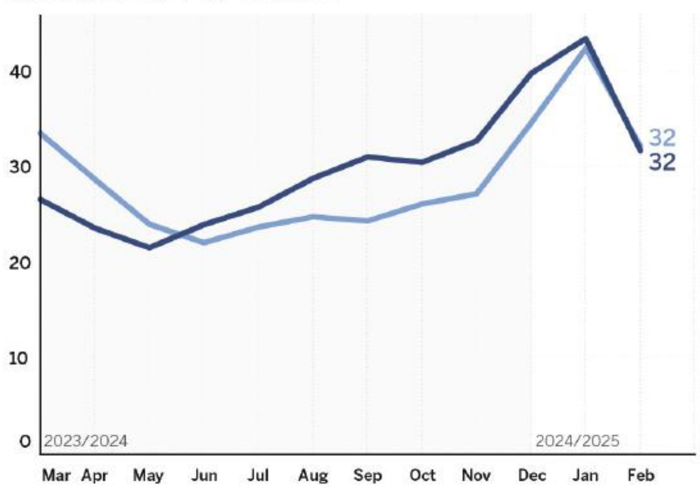
Homes Sold



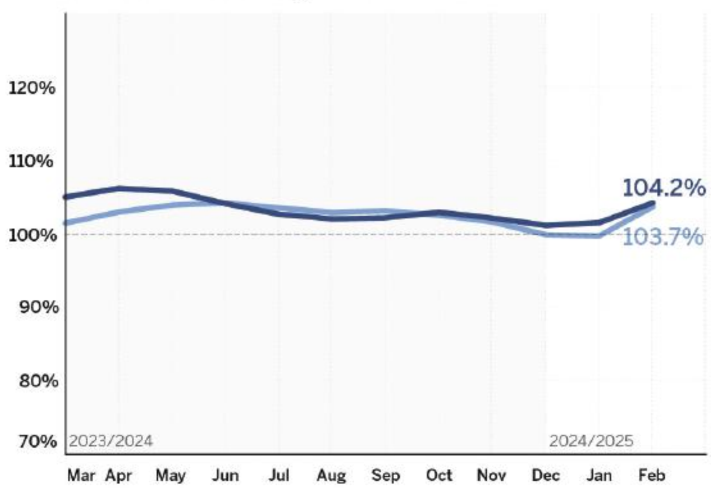
Median Price



Average Days on Market



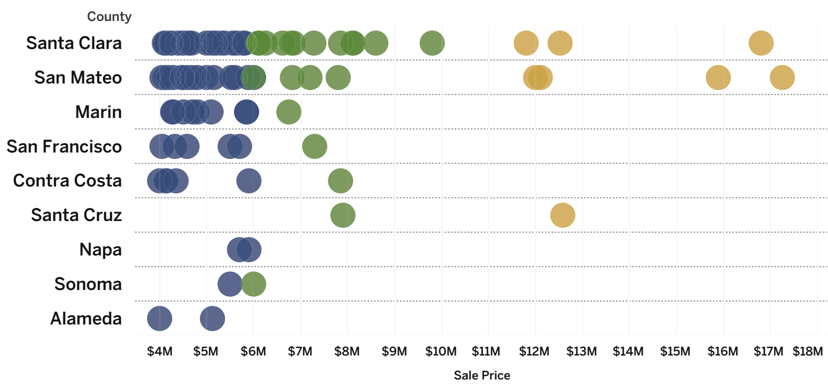
Sold Price as % of Original List Price



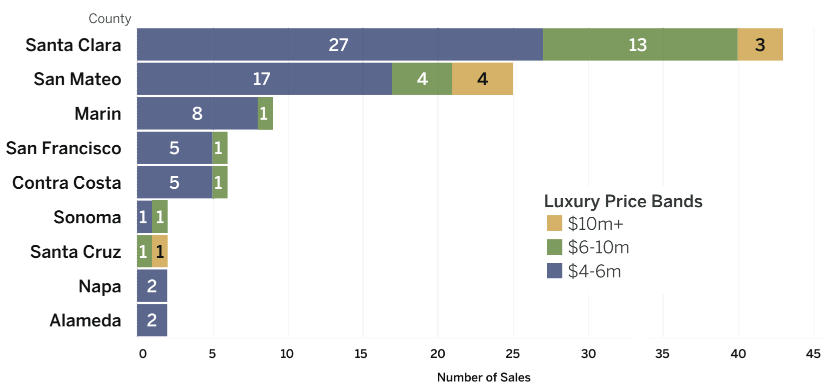
SAN FRANCISCO BAY AREA LUXURY MARKET - $4 MILLION AND ABOVE

Golden Gate Sotheby's International Realty serves the SF Bay Area luxury home market with exclusive access to the largest international "Luxury MLS" — the Sotheby's International Realty listing syndication platform, which includes sothebysrealty.com and partners that include *Mansion Global, The Wall Street Journal, James Edition*, PropGoLuxury.com, and Juwai.com, just to name a few. The platform allows buyers from around the world to locate luxury homes in the SF Bay Area and beyond.

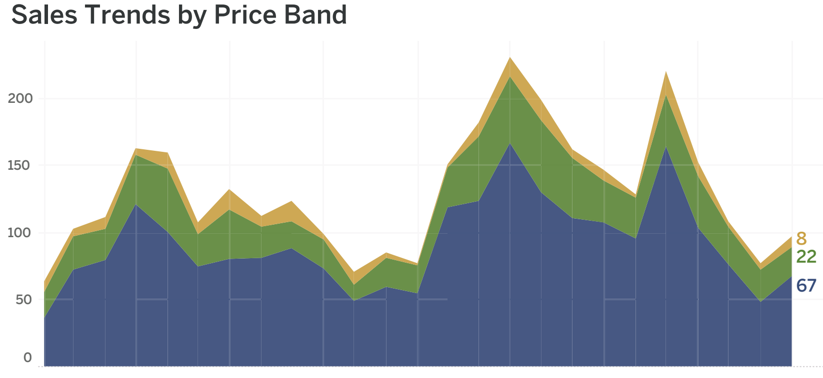
February 2025 Luxury Sales by County and Sale Price



February 2025 Luxury Sales by Price Band



Sales Trends by Price Band



FEATURED SALES

REPRESENTED BY GOLDEN GATE SOTHEBY'S INTERNATIONAL REALTY

$17,250,000
Raymundo Drive, Woodside

$12,100,000
Cresta Vista Lane, Portola Valley

$6,800,000
Dana Avenue, Palo Alto

$5,900,000
Vichy Avenue, Napa

$5,700,000
Chapparal Circle, Napa

$4,700,000
Paradise Drive, Tiburon

$4,250,000
Aztec Ridge Drive, Los Gatos

San Francisco
SINGLE FAMILY

SALES BY DISTRICT · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
District 1	$2,322,990	$2,088,888	112.4%	$4,050,000	$984	11	9
District 2	$1,775,596	$1,645,000	121.9%	$2,895,000	$1,097	28	15
District 3	$1,235,287	$1,217,500	106.7%	$1,630,000	$747	6	44
District 4	$2,094,223	$1,875,000	114.3%	$5,700,000	$1,015	21	17
District 5	$2,361,343	$2,017,000	109.9%	$5,500,000	$1,128	17	21
District 6	$2,927,500	$2,900,000	109.0%	$4,582,500	$1,107	3	6
District 7	$5,337,500	$5,337,500	98.4%	$7,300,000	$1,265	2	10
District 8	-	-	-	-	-	0	-
District 9	$1,846,622	$1,715,000	113.5%	$3,345,000	$991	18	23
District 10	$1,099,505	$1,055,000	110.5%	$1,805,000	$797	32	38
San Francisco	**$1,845,534**	**$1,600,860**	**113.5%**	**$7,300,000**	**$983**	**138**	**23**

DISTRICT 1
Central Richmond, Inner Richmond, Outer Richmond, Jordan Park/ Laurel Heights, Presidio, Lake Street, Sea Cliff, Lone Mountain

DISTRICT 2
Golden Gate Heights, Outer Parkside, Outer Sunset, Parkside, Central Sunset, Inner Sunset, Inner Parkside

DISTRICT 3
Lake Shore, Merced Heights, Pine Lake Park, Stonestown, Lakeside, Merced Manor, Ingleside, Ingleside Heights, Oceanview

DISTRICT 4
Balboa Terrace, Diamond Heights, Forest Hill, Forest Knolls, Ingleside Terrace, Midtown Terrace, Saint Francis Wood, Miraloma Park, Forest Hill Extension, Sherwood Forest, Mount Davidson Manor, Westwood Highlands, Westwood Park, Sunnyside, West Portal, Monterey Heights

DISTRICT 5
Glen Park, Haight Ashbury, Noe Valley, Twin Peaks, Cole Valley/Parnassus Heights, Buena Vista/Ashbury Heights, Castro, Corona Heights, Clarendon Heights, Duboce Triangle, Eureka Valley/Dolores Heights, Mission Dolores

DISTRICT 6
Anza Vista, Hayes Valley, Lower Pacific Heights, Western Addition, Alamo Square, North Panhandle

DISTRICT 7
Marina, Pacific Heights, Presidio Heights, Cow Hollow

DISTRICT 8
Downtown, Financial District/Barbary Coast, Nob Hill, North Beach, Russian Hill, Van Ness/Civic Center, Telegraph Hill, North Waterfront, Tenderloin

DISTRICT 9
Bernal Heights, Inner Mission, Mission Bay, Potrero Hill, South of Market, Yerba Buena, South Beach, Central Waterfront/ Dogpatch

DISTRICT 10
Bayview, Crocker Amazon, Excelsior, Outer Mission, Visitacion Valley, Portola, Silver Terrace, Mission Terrace, Hunter's Point, Bayview Heights, Candlestick, Little Hollywood

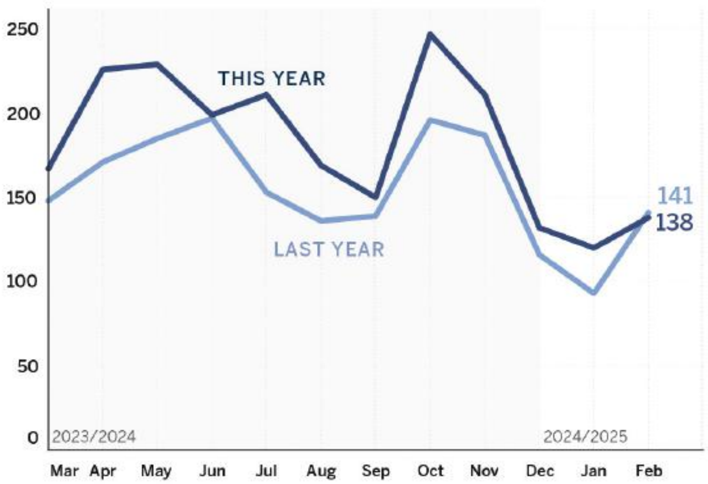
SAN FRANCISCO COUNTY SINGLE FAMILY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

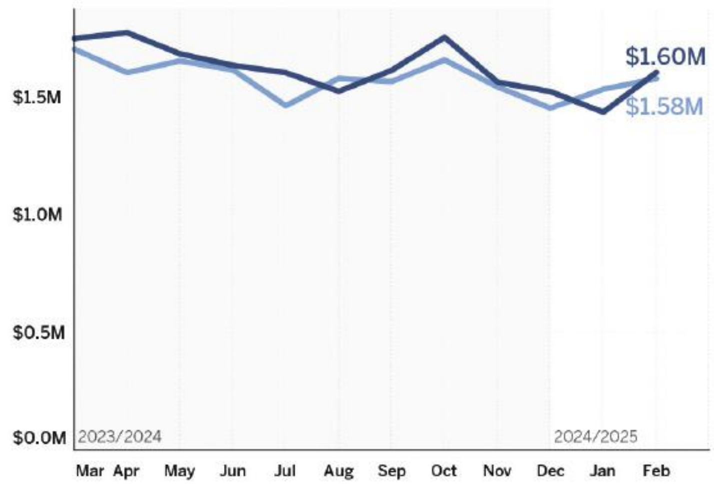
SAN FRANCISCO COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

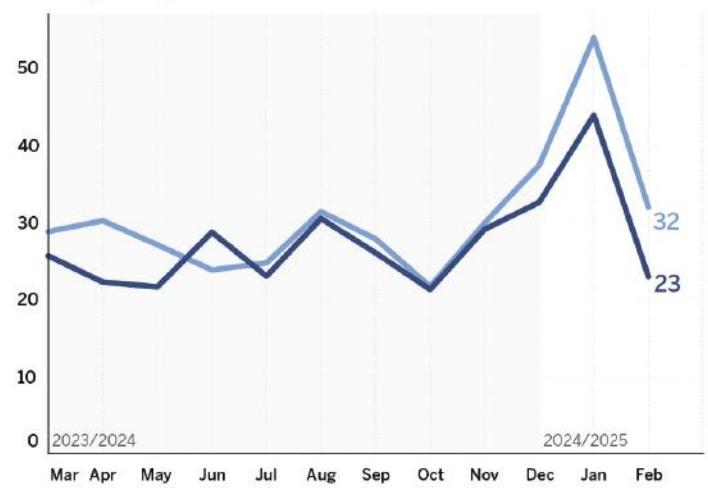
Homes Sold



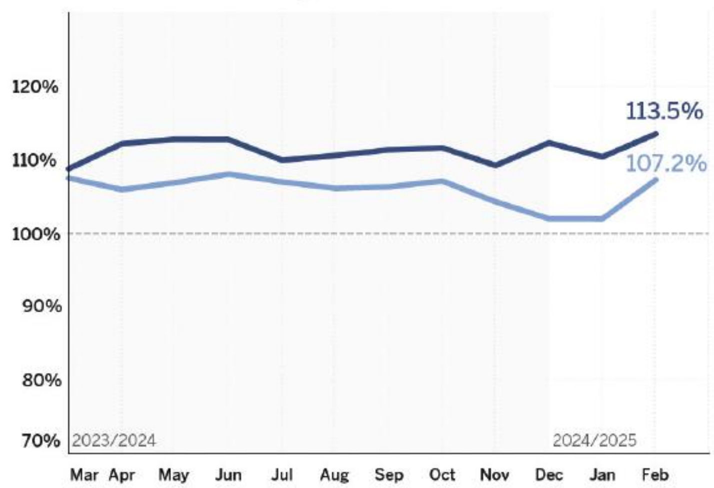
Median Price



Average Days on Market



Sold Price as % of Original List Price



San Francisco
CONDOS

SALES BY DISTRICT · CONDOS · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
District 1	$1,561,571	$1,588,000	103.9%	$2,815,000	$857	7	62
District 2	$910,000	$910,000	92.1%	$1,155,000	$815	2	100
District 3	-	-	-	-	-	0	-
District 4	$942,500	$942,500	98.3%	$1,215,000	$743	2	20
District 5	$1,655,132	$1,400,000	107.3%	$3,300,000	$901	19	24
District 6	$1,042,955	$1,086,000	105.3%	$1,715,000	$849	16	39
District 7	$2,124,223	$1,768,125	100.8%	$4,900,000	$959	23	32
District 8	$1,108,914	$970,000	99.9%	$2,995,000	$898	35	40
District 9	$1,214,620	$895,000	95.3%	$7,100,000	$906	68	68
District 10	$601,976	$595,000	98.1%	$720,000	$644	5	63
San Francisco	**$1,333,582**	**$1,100,000**	**99.6%**	**$7,100,000**	**$893**	**177**	**50**

DISTRICT 1
Central Richmond, Inner Richmond, Outer Richmond, Jordan Park/Laurel Heights, Presidio, Lake Street, Sea Cliff, Lone Mountain

DISTRICT 2
Golden Gate Heights, Outer Parkside, Outer Sunset, Parkside, Central Sunset, Inner Sunset, Inner Parkside

DISTRICT 3
Lake Shore, Merced Heights, Pine Lake Park, Stonestown, Lakeside, Merced Manor, Ingleside, Ingleside Heights, Oceanview

DISTRICT 4
Balboa Terrace, Diamond Heights, Forest Hill, Forest Knolls, Ingleside Terrace, Midtown Terrace, Saint Francis Wood, Miraloma Park, Forest Hill Extension, Sherwood Forest, Mount Davidson Manor, Westwood Highlands, Westwood Park, Sunnyside, West Portal, Monterey Heights

DISTRICT 5
Glen Park, Haight Ashbury, Noe Valley, Twin Peaks, Cole Valley/Parnassus Heights, Buena Vista/Ashbury Heights, Castro, Corona Heights, Clarendon Heights, Duboce Triangle, Eureka Valley/Dolores Heights, Mission Dolores

DISTRICT 6
Anza Vista, Hayes Valley, Lower Pacific Heights, Western Addition, Alamo Square, North Panhandle

DISTRICT 7
Marina, Pacific Heights, Presidio Heights, Cow Hollow

DISTRICT 8
Downtown, Financial District/Barbary Coast, Nob Hill, North Beach, Russian Hill, Van Ness/Civic Center, Telegraph Hill, North Waterfront, Tenderloin

DISTRICT 9
Bernal Heights, Inner Mission, Mission Bay, Potrero Hill, South of Market, Yerba Buena, South Beach, Central Waterfront/Dogpatch

DISTRICT 10
Bayview, Crocker Amazon, Excelsior, Outer Mission, Visitacion Valley, Portola, Silver Terrace, Mission Terrace, Hunter's Point, Bayview Heights, Candlestick, Little Hollywood

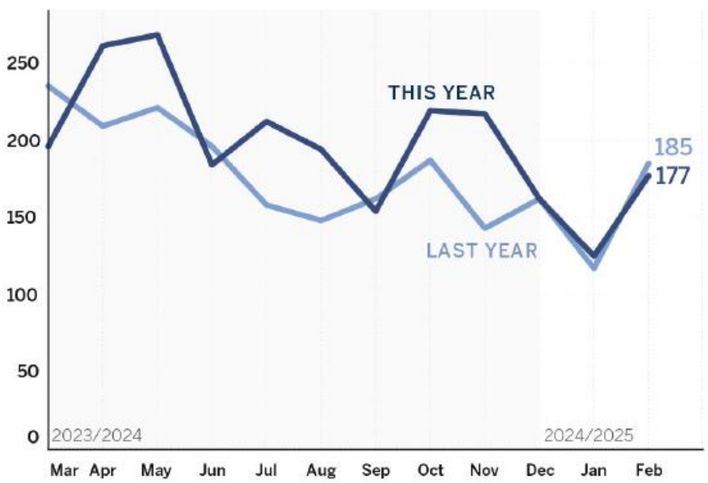
SAN FRANCISCO COUNTY CONDO MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for condo, townhouse, stock cooperative, and tenant-in-common properties only.

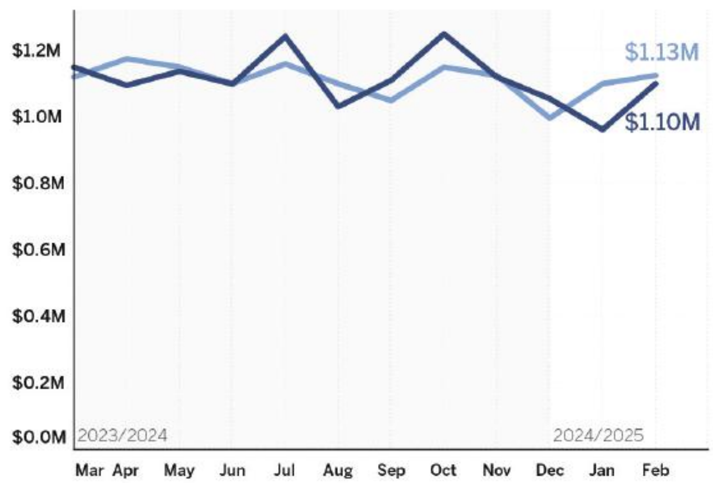
SAN FRANCISCO COUNTY CONDOS: FEBRUARY 2025

Distribution of Sales

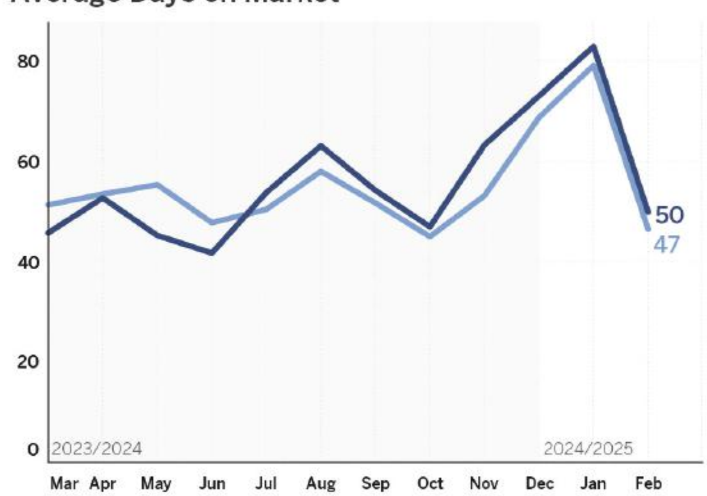
Homes Sold



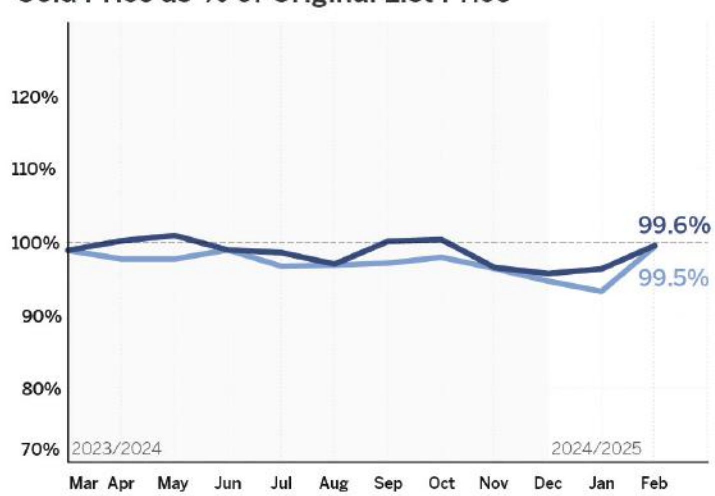
Median Price



Average Days on Market



Sold Price as % of Original List Price



Alameda
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

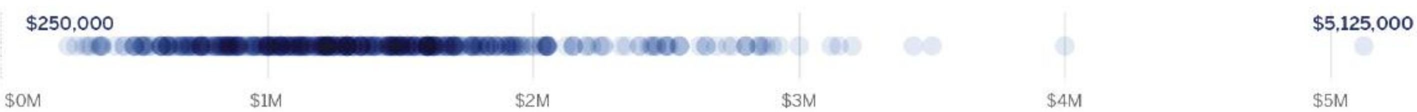
City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alameda	$1,325,912	$1,405,000	119.4%	$1,825,000	$867	18	10
Albany	$1,612,500	$1,643,500	135.6%	$1,863,000	$1,112	4	10
Berkeley	$1,662,636	$1,632,500	124.8%	$3,500,000	$950	22	18
Castro Valley	$1,294,523	$1,250,000	103.6%	$1,608,888	$728	17	24
Dublin	$1,544,891	$1,517,500	102.6%	$2,055,888	$862	26	7
Emeryville	$659,000	$659,000	89.3%	$675,000	$594	2	61
Fremont	$1,853,543	$1,722,000	105.6%	$3,121,000	$1,147	51	9
Hayward	$1,078,701	$986,500	104.6%	$2,500,000	$695	34	28
Livermore	$1,473,716	$1,300,000	104.7%	$2,800,000	$766	50	12
Newark	$1,393,105	$1,360,000	103.7%	$2,050,000	$943	19	21
Oakland	$1,063,075	$975,000	108.1%	$2,800,000	$614	114	36
Piedmont	$2,528,125	$2,737,500	111.4%	$3,430,000	$900	8	23
Pleasanton	$2,028,893	$1,657,500	100.3%	$5,125,000	$875	28	23
San Leandro	$896,211	$864,950	104.6%	$1,300,000	$655	28	22
San Lorenzo	$911,323	$872,500	108.8%	$1,151,880	$660	12	7
Sunol	-	-	-	-	-	0	-
Union City	$1,700,568	$1,601,000	114.1%	$2,730,000	$867	17	16
Alameda County	**$1,388,693**	**$1,300,000**	**107.5%**	**$5,125,000**	**$795**	**450**	**21**

ALAMEDA COUNTY MARKET TRENDS

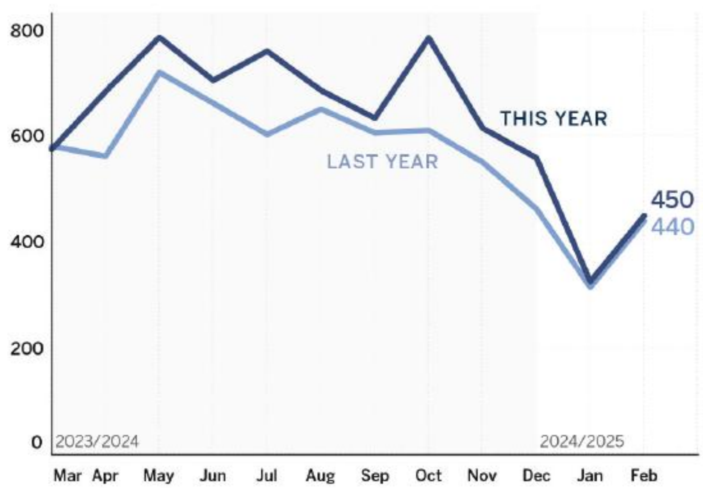
Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

ALAMEDA COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

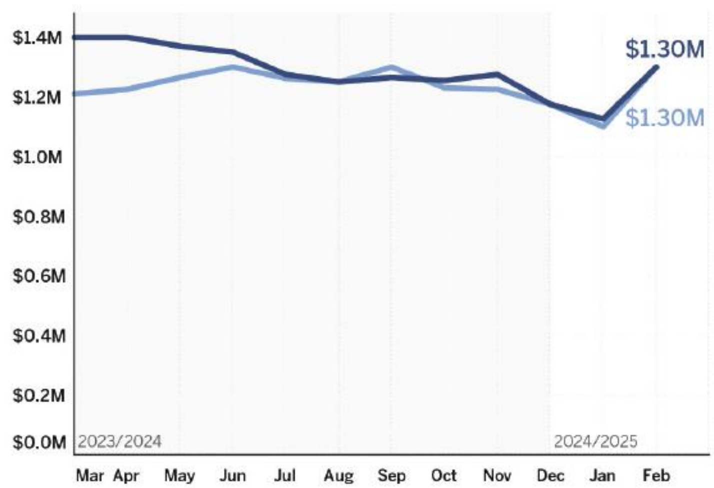
Distribution of Sales



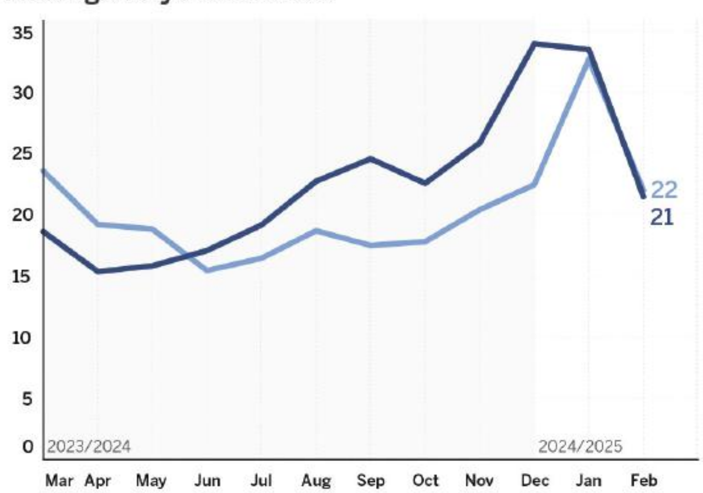
Homes Sold



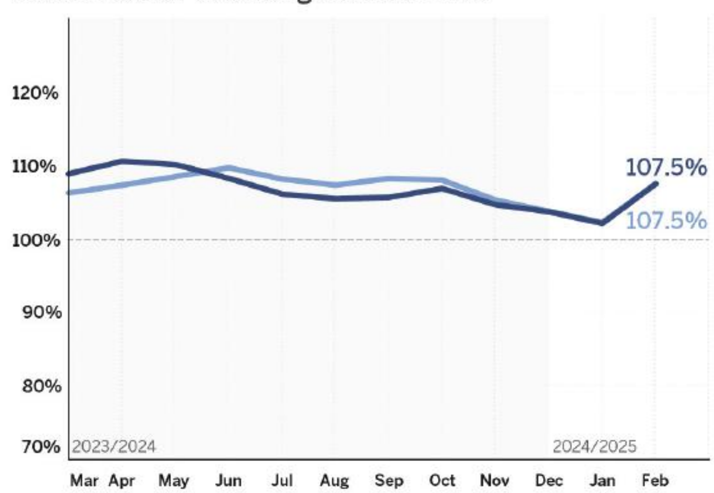
Median Price



Average Days on Market



Sold Price as % of Original List Price



Data Source: MLS. Data is for single family homes only.

Contra Costa
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alamo	$3,027,778	$2,563,888	95.4%	$5,900,000	$801	5	56
Antioch	$617,292	$597,500	100.9%	$1,095,000	$361	54	29
Bay Point	$550,800	$469,000	93.6%	$830,000	$299	5	25
Bethel Island	$915,000	$915,000	100.0%	$915,000	$587	1	0
Brentwood	$902,032	$837,000	98.9%	$1,700,000	$393	32	29
Byron	-	-	-	-	-	0	-
Canyon	-	-	-	-	-	0	-
Clayton	$1,146,500	$1,135,000	104.0%	$1,299,000	$579	6	14
Concord	$953,726	$876,000	102.3%	$1,910,000	$552	53	22
Crockett	-	-	-	-	-	0	-
Danville	$2,307,061	$2,184,000	101.5%	$4,150,000	$827	32	19
Diablo	$3,816,667	$4,000,000	98.9%	$4,350,000	$723	3	93
Discovery Bay	$910,488	$772,500	97.8%	$1,700,000	$379	18	37
El Cerrito	$1,249,494	$1,187,500	118.2%	$2,000,000	$681	12	29
El Sobrante	$708,200	$677,500	98.9%	$989,000	$513	10	41
Hercules	$877,000	$880,000	102.2%	$1,005,000	$426	9	27
Kensington	$1,313,000	$1,225,000	114.2%	$1,785,000	$726	5	14
Knightsen	-	-	-	-	-	0	-
Lafayette	$2,627,800	$1,900,000	101.7%	$7,850,000	$912	10	24
Martinez	$830,833	$757,500	100.0%	$2,080,000	$535	18	28
Moraga	$1,911,000	$2,185,000	100.0%	$2,350,000	$766	5	8
Oakley	$690,402	$667,500	99.8%	$1,175,000	$360	26	33
Orinda	$2,486,900	$2,415,000	105.6%	$4,125,000	$853	10	12
Pinole	$787,000	$850,000	103.9%	$975,000	$494	11	38
Pittsburg	$645,458	$600,000	100.5%	$991,000	$386	27	44
Pleasant Hill	$1,190,111	$1,245,000	99.5%	$1,410,000	$702	9	35
Port Costa	$840,000	$840,000	88.4%	$840,000	$295	1	180
Richmond	$739,063	$704,000	106.8%	$1,625,000	$523	44	21
Rodeo	$705,000	$705,000	99.3%	$725,000	$457	2	10
San Pablo	$627,583	$655,000	102.0%	$790,000	$549	12	29
San Ramon	$1,825,217	$1,820,000	100.1%	$2,500,000	$849	11	8
Walnut Creek	$1,604,187	$1,650,000	102.6%	$2,640,000	$778	17	12
Contra Costa County	**$1,108,667**	**$839,500**	**102.0%**	**$7,850,000**	**$543**	**448**	**27**

Golden Gate | Sotheby's INTERNATIONAL REALTY

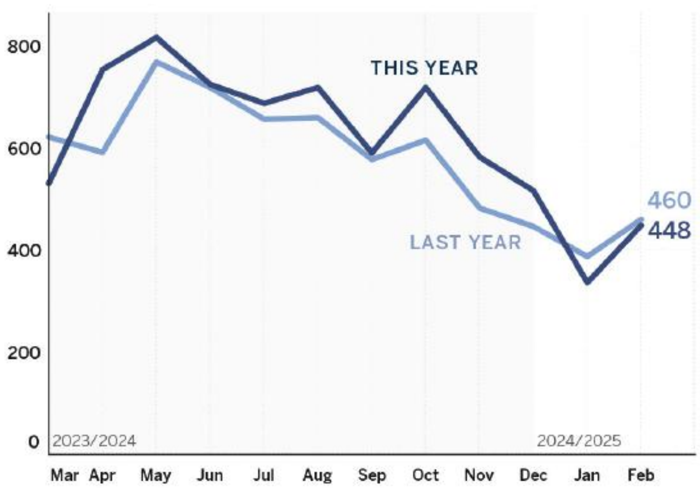
CONTRA COSTA COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

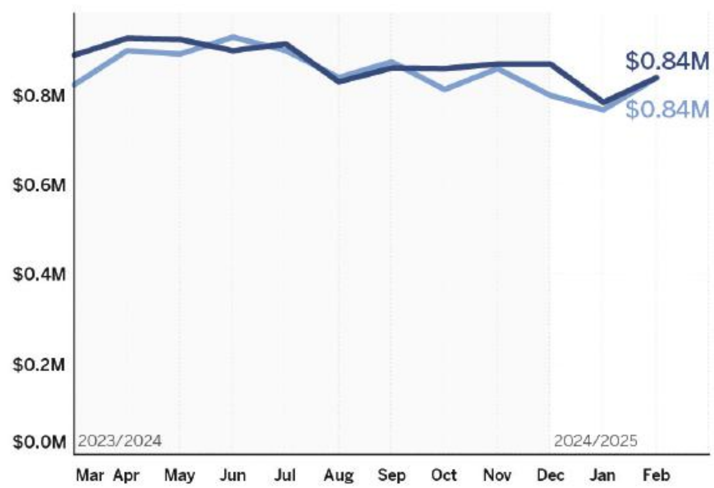
CONTRA COSTA COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

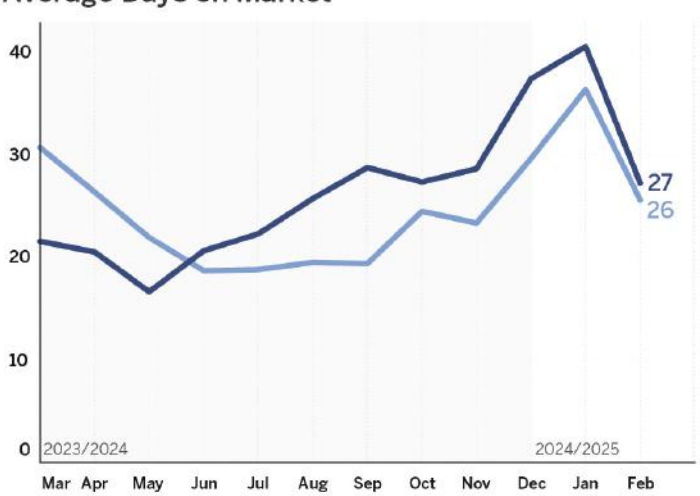
Homes Sold



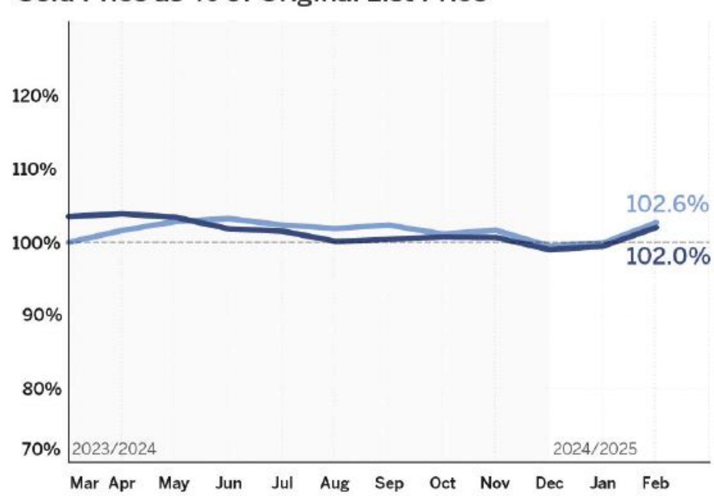
Median Price



Average Days on Market



Sold Price as % of Original List Price



Marin
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Belvedere	$5,095,000	$5,095,000	98.1%	$5,095,000	$2,339	1	24
Bolinas	-	-	-	-	-	0	-
Corte Madera	$2,475,000	$2,475,000	98.5%	$3,200,000	$1,192	2	25
Dillon Beach	$795,000	$795,000	100.8%	$795,000	$1,656	1	21
Fairfax	$1,472,500	$1,472,500	107.1%	$2,025,000	$826	2	17
Fallon	-	-	-	-	-	0	-
Forest Knolls	$450,000	$450,000	90.2%	$450,000	$904	1	56
Greenbrae	$3,444,000	$3,444,000	105.8%	$4,288,000	$1,093	2	9
Inverness	$2,300,000	$2,300,000	88.5%	$2,700,000	$973	2	179
Kentfield	$4,275,000	$4,275,000	95.0%	$4,275,000	$1,217	1	0
Lagunitas	-	-	-	-	-	0	-
Larkspur	$2,156,250	$2,150,000	123.2%	$2,625,000	$1,681	4	6
Marshall	-	-	-	-	-	0	-
Mill Valley	$2,408,000	$2,305,000	97.8%	$4,805,000	$923	13	44
Muir Beach	$2,250,000	$2,250,000	102.5%	$2,250,000	$1,131	1	63
Nicasio	$845,000	$845,000	56.5%	$845,000	$587	1	603
Novato	$1,398,655	$1,300,000	99.3%	$2,465,000	$600	29	39
Olema	-	-	-	-	-	0	-
Pt. Reyes Station	-	-	-	-	-	0	-
Ross	$2,250,000	$2,250,000	112.8%	$2,250,000	$1,810	1	12
San Anselmo	$1,748,333	$1,550,000	94.0%	$2,765,000	$832	6	88
San Geronimo	-	-	-	-	-	0	-
San Rafael	$1,445,667	$1,420,000	105.1%	$2,495,000	$865	15	32
Sausalito	$2,100,000	$2,100,000	96.0%	$2,200,000	$993	2	13
Stinson Beach	$5,850,000	$5,850,000	84.2%	$5,850,000	$2,156	1	265
Tiburon	$3,919,889	$3,667,000	98.4%	$6,750,000	$1,227	9	24
Tomales	-	-	-	-	-	0	-
Woodacre	-	-	-	-	-	0	-
Marin County	**$2,056,777**	**$1,703,125**	**100.0%**	**$6,750,000**	**$926**	**94**	**48**

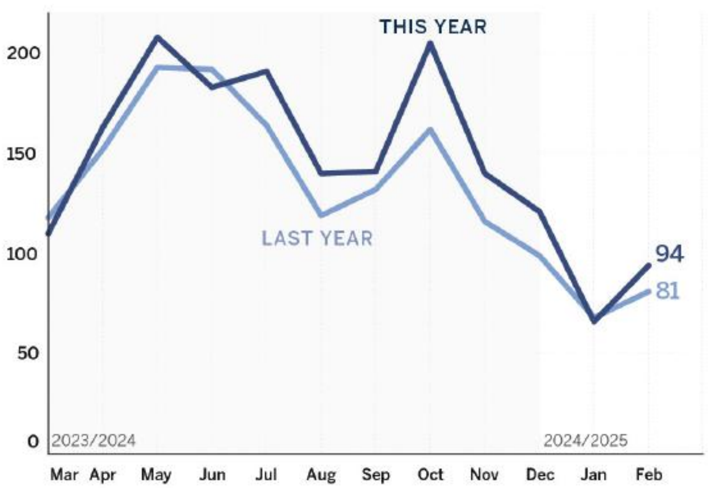
MARIN COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

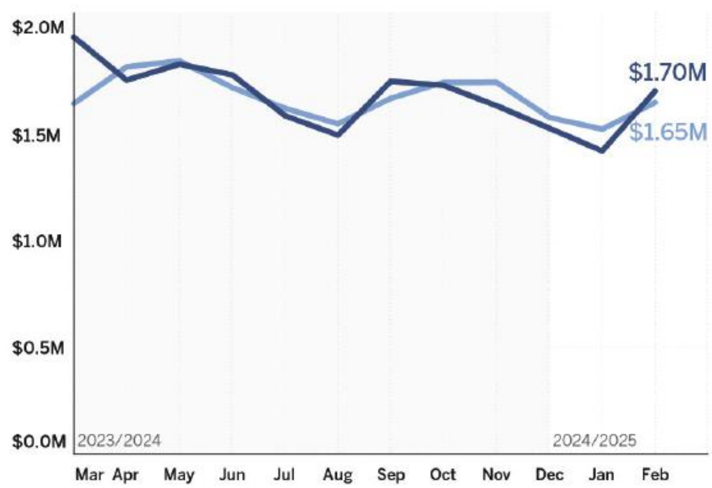
MARIN COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

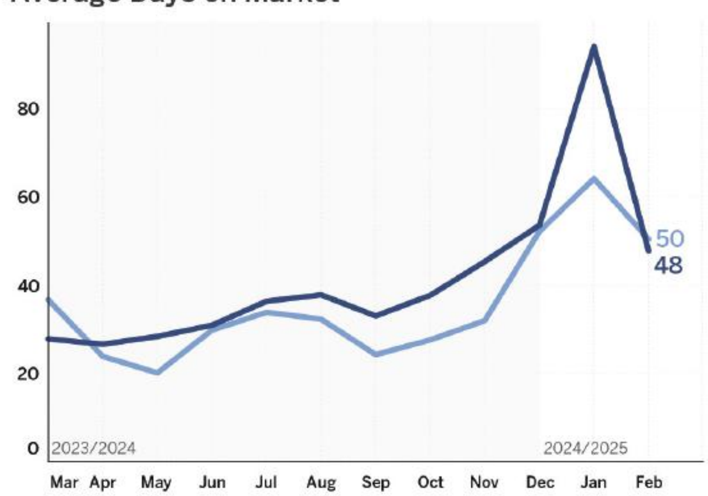
Homes Sold



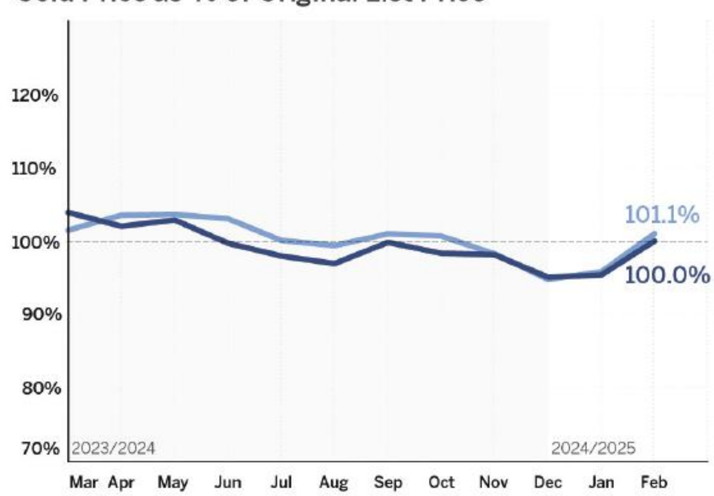
Median Price



Average Days on Market



Sold Price as % of Original List Price



Napa
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
American Canyon	$662,309	$700,868	99.4%	$790,000	$386	4	13
Angwin	$1,100,000	$1,100,000	66.7%	$1,100,000	$643	1	301
Calistoga	$1,725,000	$1,725,000	69.0%	$1,725,000	$597	1	278
Deer Park	-	-	-	-	-	0	-
Napa	$1,355,275	$943,250	92.9%	$5,900,000	$644	36	100
Oakville	-	-	-	-	-	0	-
Pope Valley	-	-	-	-	-	0	-
Rutherford	-	-	-	-	-	0	-
St. Helena	$2,226,250	$1,938,500	88.3%	$3,400,000	$867	4	117
Yountville	$1,772,500	$1,772,500	95.1%	$2,250,000	$1,034	2	68
Napa County	**$1,389,878**	**$1,018,500**	**92.1%**	**$5,900,000**	**$656**	**48**	**101**

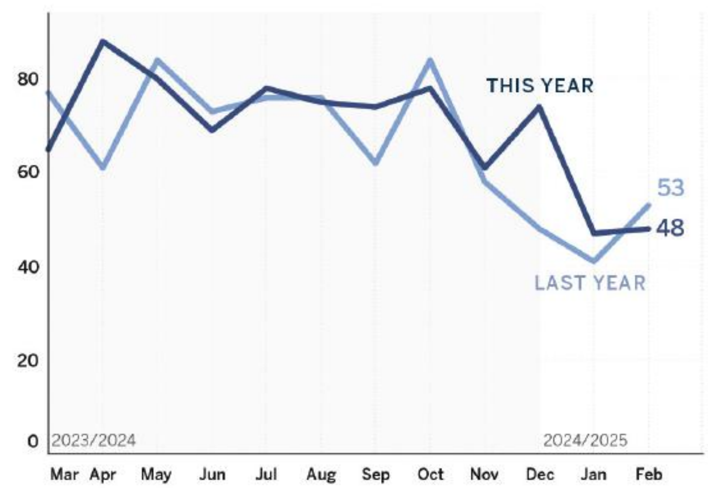
NAPA COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

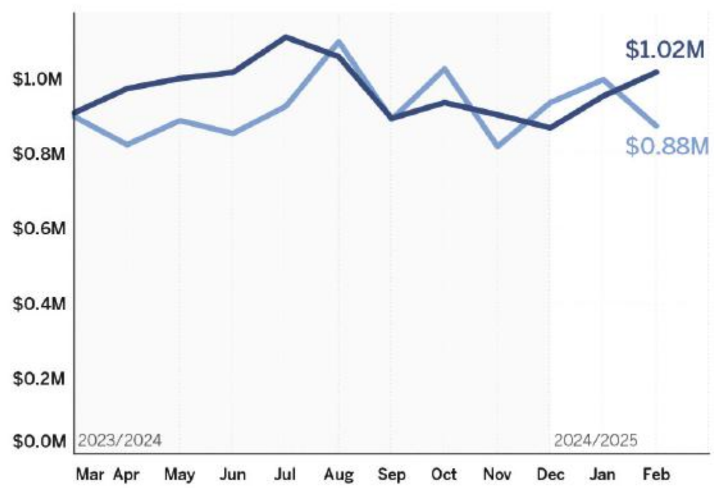
NAPA COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

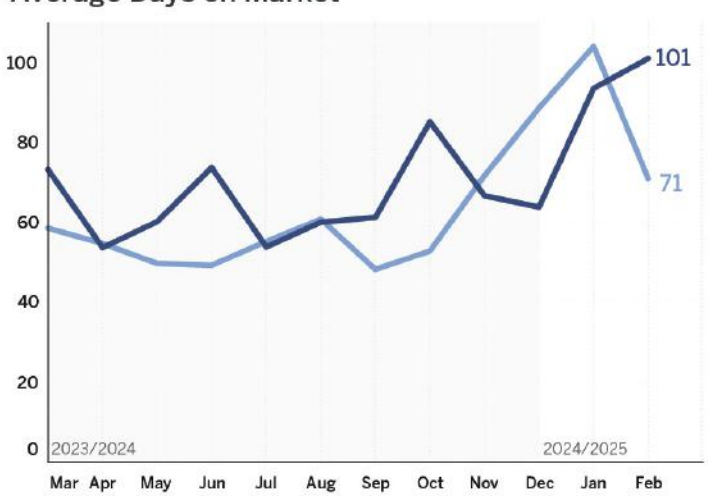
Homes Sold



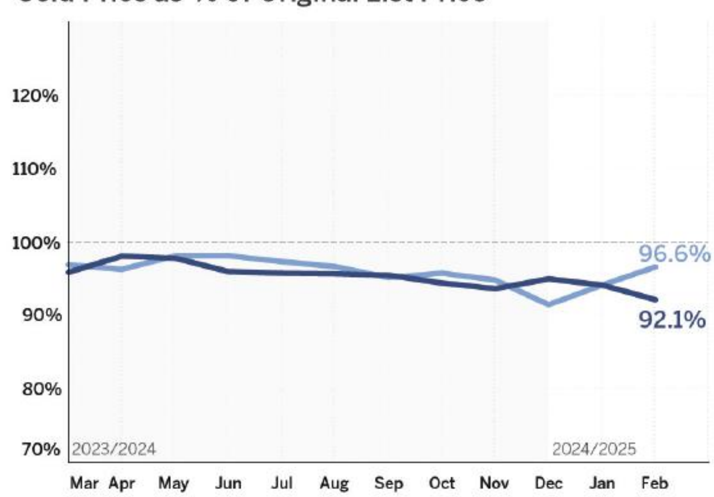
Median Price



Average Days on Market



Sold Price as % of Original List Price



San Mateo
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Atherton	$11,896,000	$12,000,000	105.0%	$15,888,000	$2,489	3	9
Belmont	$2,881,607	$2,750,000	112.3%	$4,688,888	$1,337	13	6
Brisbane	$2,380,000	$2,380,000	119.0%	$2,380,000	$725	1	12
Burlingame	$3,409,893	$3,412,000	103.8%	$4,485,000	$1,474	7	37
Colma	-	-	-	-	-	0	-
Daly City	$1,210,725	$1,223,000	110.1%	$1,453,800	$794	16	14
East Palo Alto	$1,122,500	$1,120,000	92.9%	$1,400,000	$701	6	44
El Granada	$1,803,333	$1,760,000	101.0%	$2,050,000	$903	3	12
Foster City	$2,249,578	$2,220,888	100.6%	$2,717,000	$1,089	5	13
Half Moon Bay	$2,661,250	$2,960,000	90.0%	$3,200,000	$914	4	120
Hillsborough	$5,522,571	$5,528,000	102.3%	$7,200,000	$1,434	7	28
La Honda	$344,000	$344,000	96.9%	$344,000	$509	1	11
Loma Mar	-	-	-	-	-	0	-
Menlo Park	$3,806,657	$3,715,000	105.5%	$6,825,000	$1,654	12	14
Millbrae	$2,430,633	$2,360,000	107.9%	$3,288,000	$1,132	4	14
Montara	$1,900,000	$1,900,000	100.0%	$1,900,000	$823	1	8
Moss Beach	-	-	-	-	-	0	-
Pacifica	$1,349,083	$1,311,000	112.3%	$1,850,000	$966	12	14
Pescadero	-	-	-	-	-	0	-
Portola Valley	$7,300,000	$7,300,000	95.6%	$12,100,000	$1,872	2	73
Redwood City	$2,570,701	$2,450,000	105.5%	$4,800,000	$1,253	27	22
Redwood Shores	$2,968,000	$2,968,000	110.4%	$2,968,000	$1,393	1	7
San Bruno	$1,415,667	$1,400,000	108.9%	$1,910,000	$961	12	20
San Carlos	$3,197,385	$3,050,000	107.7%	$4,100,000	$1,453	13	8
San Gregorio	-	-	-	-	-	0	-
San Mateo	$2,126,667	$2,015,000	108.0%	$3,670,000	$1,177	30	18
South San Francisco	$1,543,067	$1,492,000	110.5%	$2,200,000	$974	15	17
Woodside	$9,243,000	$5,999,000	97.1%	$17,250,000	$1,937	3	37
San Mateo County	**$2,654,076**	**$2,107,500**	**106.6%**	**$17,250,000**	**$1,197**	**198**	**20**

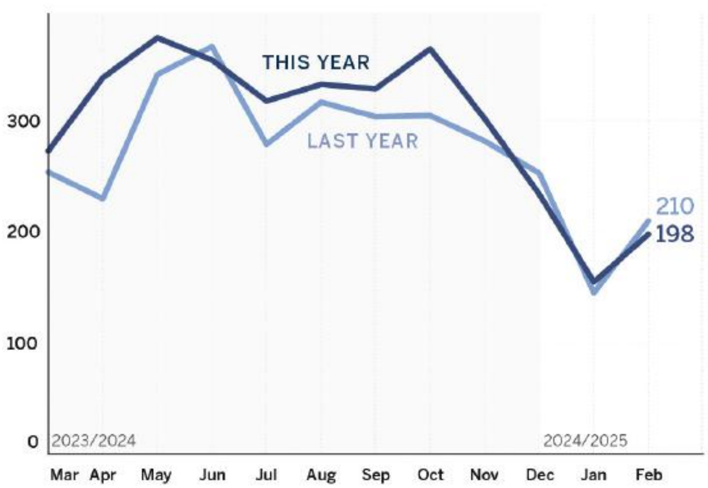
SAN MATEO COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

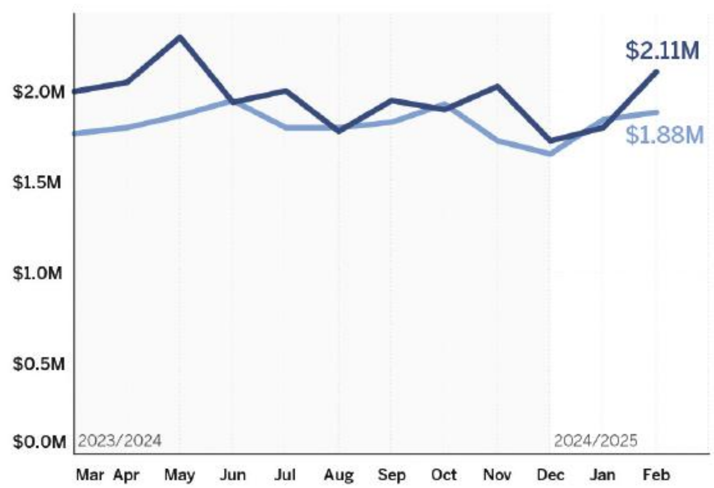
SAN MATEO COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

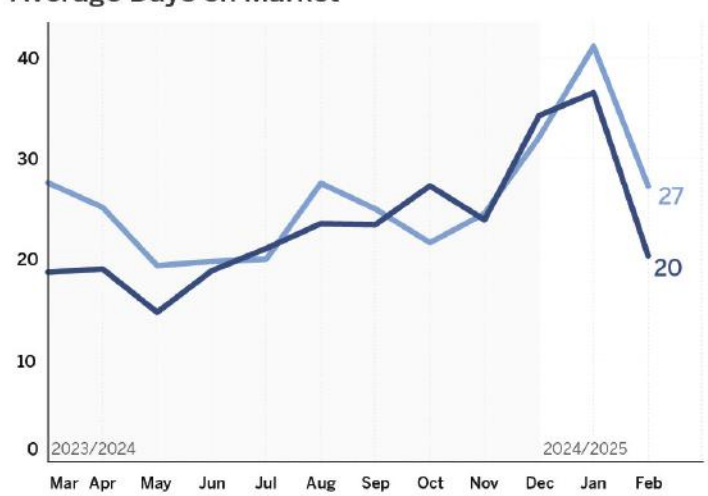
Homes Sold



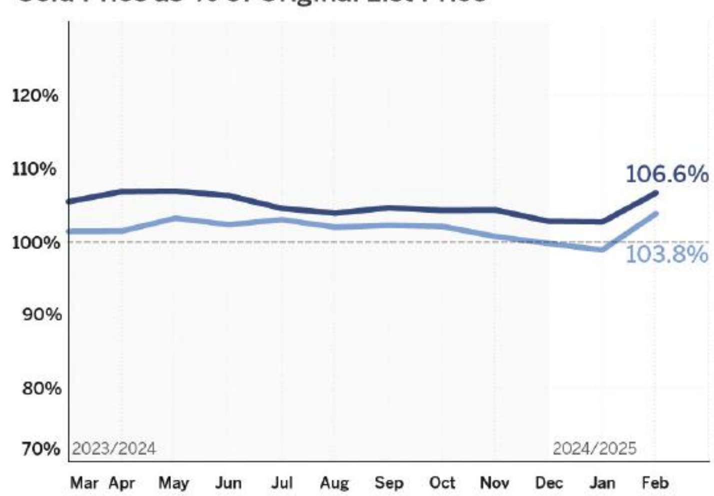
Median Price



Average Days on Market



Sold Price as % of Original List Price



Santa Clara
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Campbell	$2,369,350	$2,210,000	112.1%	$3,230,000	$1,326	8	23
Cupertino	$4,003,375	$3,800,000	121.9%	$5,300,000	$1,908	8	8
Gilroy	$1,317,494	$1,250,000	100.7%	$3,000,000	$552	18	32
Los Altos	$6,062,500	$5,955,000	118.3%	$8,600,000	$1,919	8	5
Los Altos Hills	$6,020,984	$5,677,500	108.6%	$8,100,000	$1,453	8	7
Los Gatos	$3,695,372	$2,885,000	104.0%	$12,521,464	$1,351	12	29
Milpitas	$1,677,545	$1,580,000	108.2%	$2,161,000	$1,096	13	15
Monte Sereno	$5,811,500	$5,123,000	109.1%	$9,800,000	$1,781	4	5
Morgan Hill	$1,704,080	$1,600,000	102.3%	$3,250,000	$778	25	25
Mountain View	$2,707,399	$2,758,888	113.0%	$4,225,000	$1,889	11	7
Palo Alto	$5,028,354	$3,826,250	108.0%	$16,800,000	$2,035	24	19
San Jose	$1,856,160	$1,745,000	108.7%	$4,100,000	$1,069	250	16
San Martin	$927,000	$927,000	105.9%	$927,000	$743	1	7
Santa Clara	$2,144,353	$2,200,000	116.2%	$2,760,000	$1,407	26	7
Saratoga	$4,161,944	$4,125,000	106.6%	$6,850,000	$1,604	9	23
Stanford	-	-	-	-	-	0	-
Sunnyvale	$2,559,532	$2,494,000	119.7%	$3,630,000	$1,742	22	8
Santa Clara County	**$2,389,965**	**$1,999,998**	**109.3%**	**$16,800,000**	**$1,223**	**447**	**16**

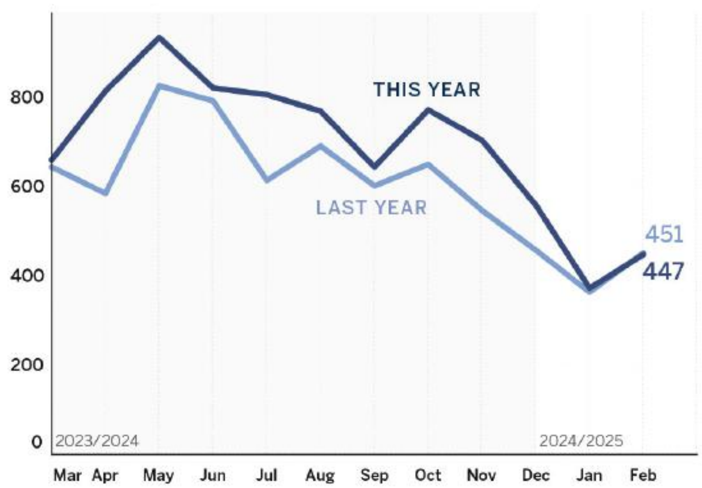
SANTA CLARA COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

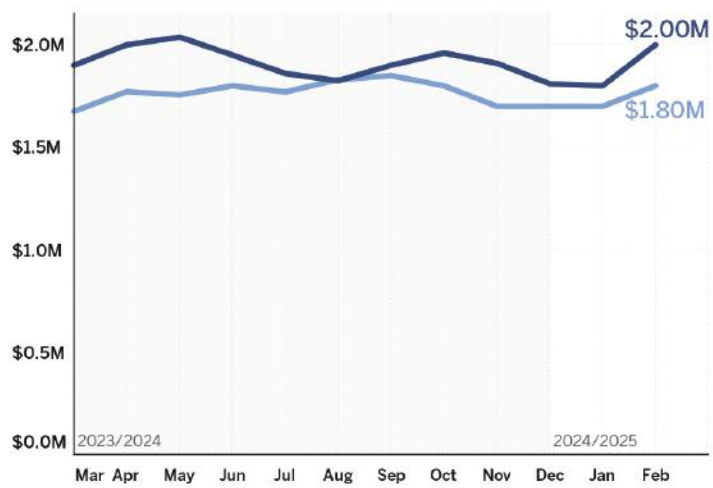
SANTA CLARA COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

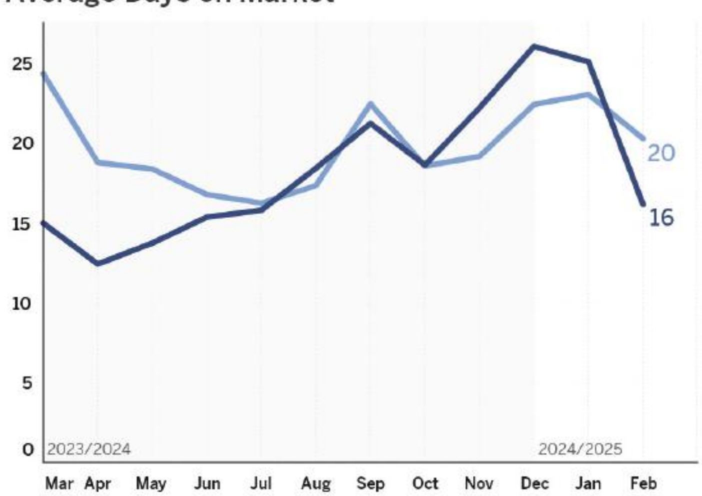
Homes Sold



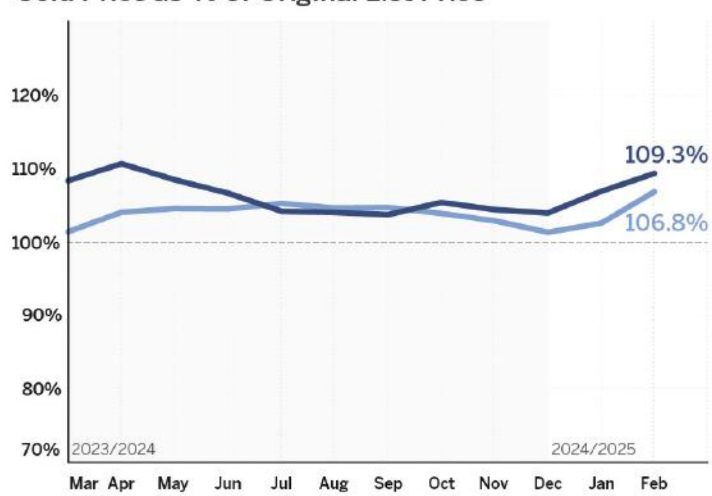
Median Price



Average Days on Market



Sold Price as % of Original List Price



Santa Cruz
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Aptos	$1,898,375	$1,586,500	97.1%	$3,454,000	$872	8	31
Ben Lomond	$1,057,000	$1,057,000	103.9%	$1,199,000	$577	2	9
Boulder Creek	$620,000	$642,500	87.8%	$840,000	$436	6	67
Brookdale	-	-	-	-	-	0	-
Capitola	-	-	-	-	-	0	-
Corralitos	-	-	-	-	-	0	-
Davenport	-	-	-	-	-	0	-
Felton	$934,100	$812,000	93.0%	$1,685,000	$633	5	56
Freedom	$750,000	$750,000	107.3%	$750,000	$701	1	4
La Selva Beach	-	-	-	-	-	0	-
Los Gatos	$1,146,000	$1,146,000	100.1%	$1,375,000	$565	2	9
Mount Hermon	$310,000	$310,000	77.7%	$310,000	$359	1	177
Santa Cruz	$2,336,737	$1,482,500	95.9%	$12,578,750	$1,215	20	42
Scotts Valley	$1,329,500	$1,315,000	94.4%	$1,498,000	$667	4	36
Soquel	$1,565,000	$1,565,000	97.8%	$1,565,000	$735	1	56
Watsonville	$887,863	$820,000	95.0%	$1,369,000	$710	8	61
Santa Cruz County	**$1,547,658**	**$1,245,000**	**95.1%**	**$12,578,750**	**$853**	**58**	**46**

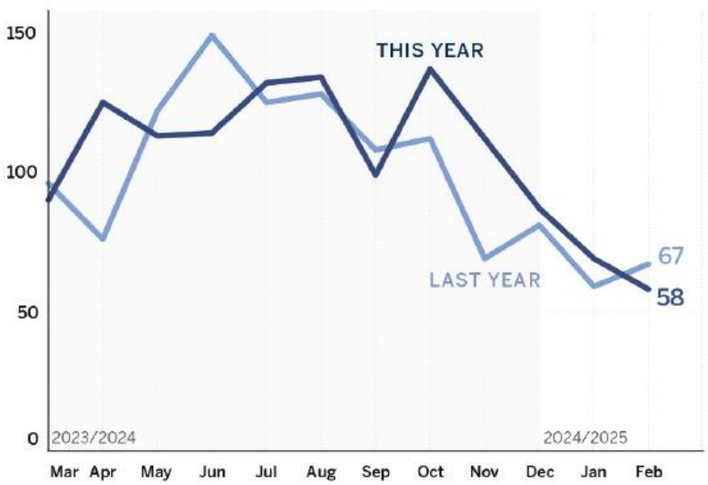
SANTA CRUZ COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

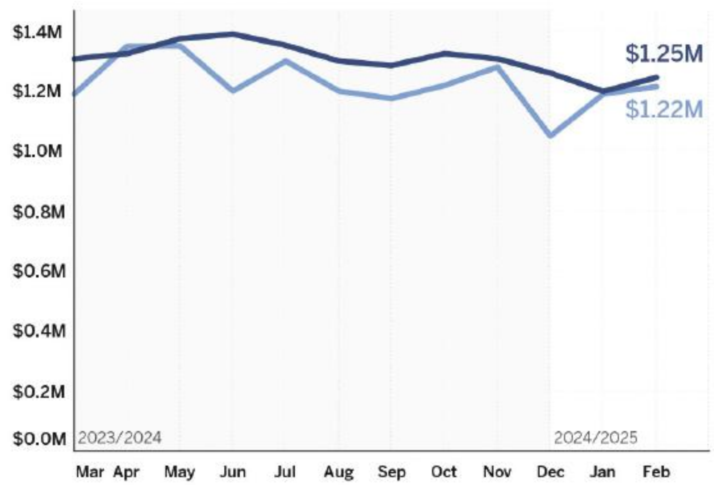
SANTA CRUZ COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

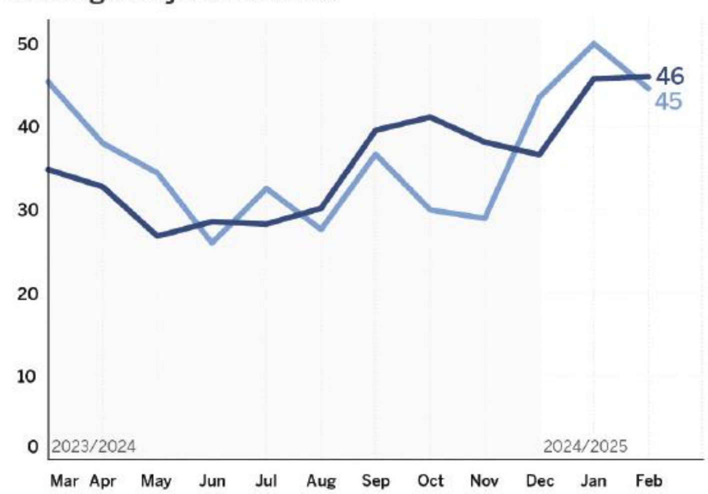
Homes Sold



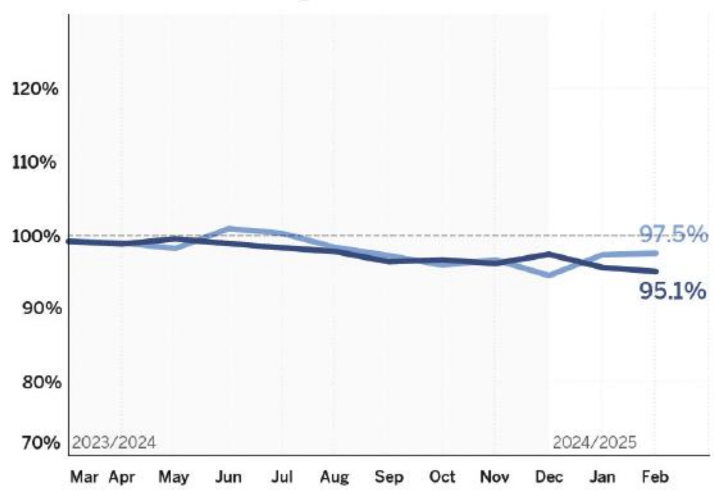
Median Price



Average Days on Market



Sold Price as % of Original List Price



Solano
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

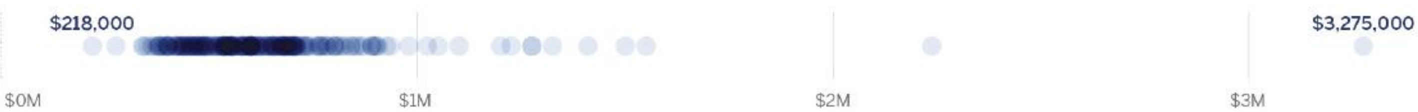
City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Benicia	$868,900	$865,000	103.3%	$1,024,000	$527	10	10
Birds Landing	-	-	-	-	-	0	-
Dixon	$837,357	$617,500	104.1%	$3,275,000	$457	20	65
Elmira	-	-	-	-	-	0	-
Fairfield	$644,147	$650,000	96.9%	$1,410,000	$343	57	57
Rio Vista	$467,951	$450,000	96.2%	$599,000	$272	19	78
Suisun City	$568,116	$585,000	91.4%	$725,000	$335	15	59
Vacaville	$682,918	$650,000	97.5%	$1,550,000	$378	61	47
Vallejo	$551,899	$555,000	99.0%	$900,000	$352	53	44
Winters	$1,100,000	$1,100,000	98.2%	$1,100,000	$388	1	34
Solano County	**$642,263**	**$597,500**	**98.0%**	**$3,275,000**	**$365**	**236**	**52**

SOLANO COUNTY MARKET TRENDS

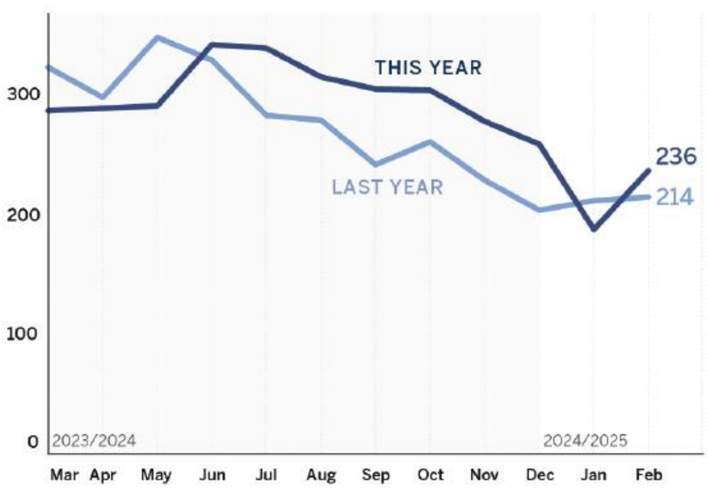
Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

SOLANO COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

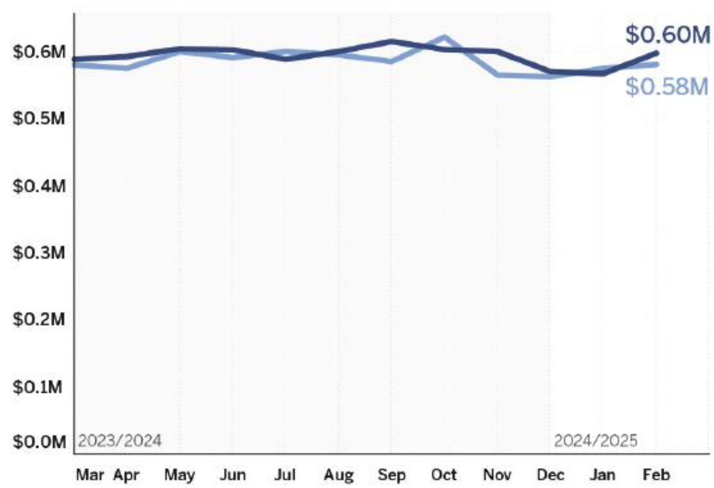
Distribution of Sales



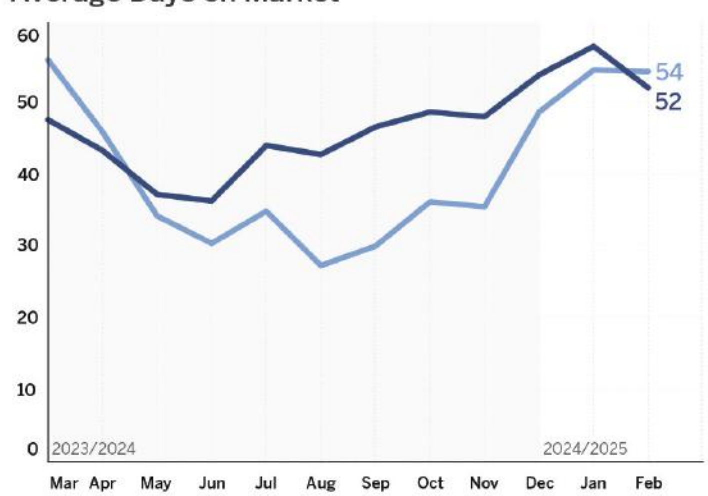
Homes Sold



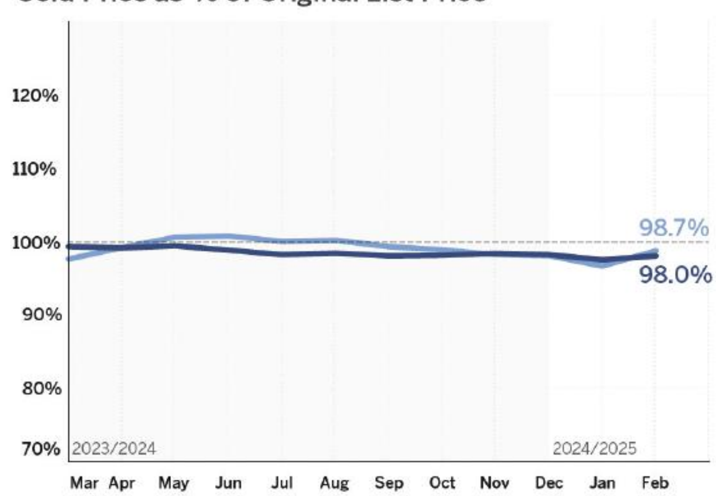
Median Price



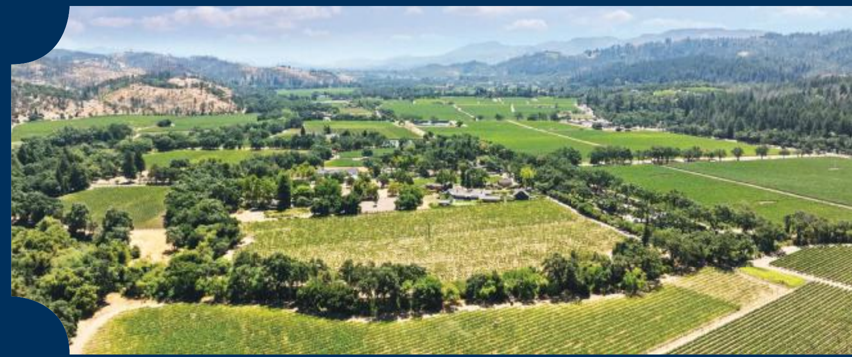
Average Days on Market



Sold Price as % of Original List Price



Sonoma
COUNTY



SALES BY CITY · SINGLE FAMILY HOMES · FEBRUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Annapolis	makes	-	-	-	-	0	-
Bodega	-	-	-	-	-	0	-
Bodega Bay	$1,497,500	$1,500,000	98.2%	$1,527,500	$693	3	62
Camp Meeker	$366,250	$366,250	91.8%	$366,250	$574	1	265
Cazadero	$200,000	$200,000	34.5%	$200,000	$118	1	146
Cloverdale	$707,250	$712,000	95.9%	$775,000	$418	4	83
Cotati	$578,750	$570,000	103.2%	$750,000	$520	4	17
Duncan Mills	-	-	-	-	-	0	-
Forestville	-	-	-	-	-	0	-
Freestone	-	-	-	-	-	0	-
Fulton	-	-	-	-	-	0	-
Geyserville	$2,562,500	$2,562,500	90.7%	$3,500,000	$825	2	137
Glen Ellen	-	-	-	-	-	0	-
Graton	-	-	-	-	-	0	-
Guerneville	$492,833	$522,500	89.5%	$855,000	$393	6	96
Healdsburg	$1,476,750	$900,000	96.1%	$5,500,000	$633	11	76
Jenner	-	-	-	-	-	0	-
Kenwood	-	-	-	-	-	0	-
Monte Rio	-	-	-	-	-	0	-
Occidental	$1,275,000	$1,275,000	95.9%	$1,275,000	$643	1	66
Penngrove	$1,525,000	$1,525,000	96.6%	$1,750,000	$518	2	73
Petaluma	$1,222,906	$1,063,500	101.1%	$2,800,000	$605	34	33
Rio Nido	-	-	-	-	-	0	-
Rohnert Park	$828,922	$829,000	98.1%	$1,000,000	$402	19	77
Santa Rosa	$900,572	$744,500	97.6%	$2,650,000	$504	76	61
Sebastopol	$1,389,711	$1,095,000	99.3%	$2,840,000	$595	10	47
Sonoma	$1,482,233	$897,000	92.9%	$6,000,000	$629	15	65
The Sea Ranch	$1,752,500	$1,475,000	92.3%	$3,650,000	$749	7	134
Timber Cove	-	-	-	-	-	0	-
Valley Ford	-	-	-	-	-	0	-
Windsor	$802,457	$760,000	98.6%	$1,240,000	$507	16	53
Sonoma County	**$1,065,393**	**$850,000**	**97.2%**	**$6,000,000**	**$540**	**212**	**63**

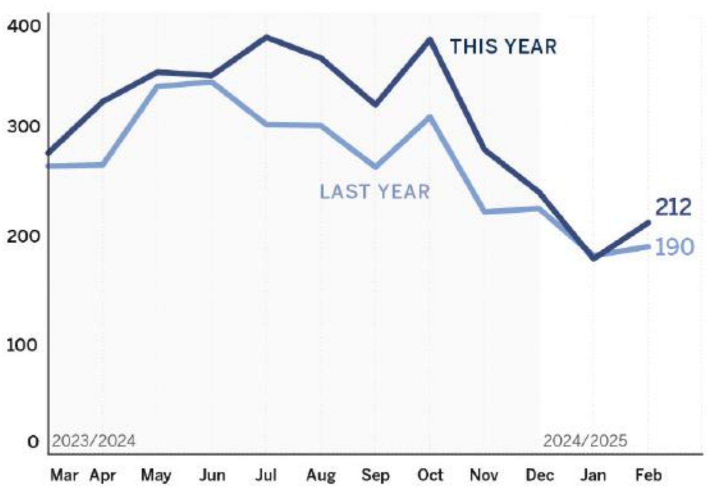
SONOMA COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

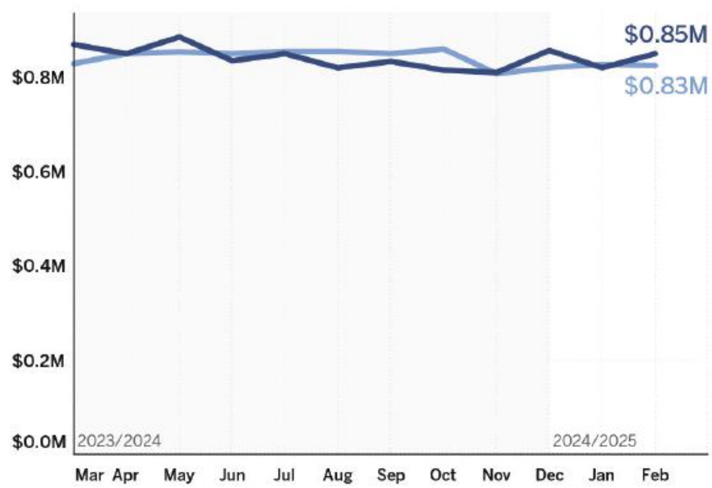
SONOMA COUNTY SINGLE FAMILY HOMES: FEBRUARY 2025

Distribution of Sales

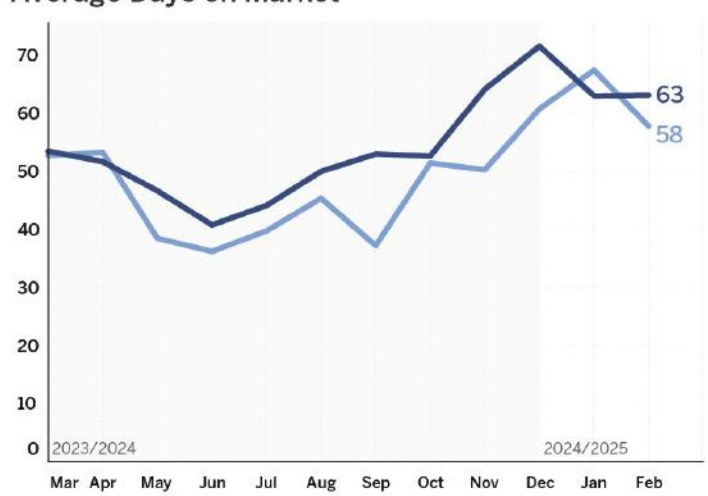
Homes Sold



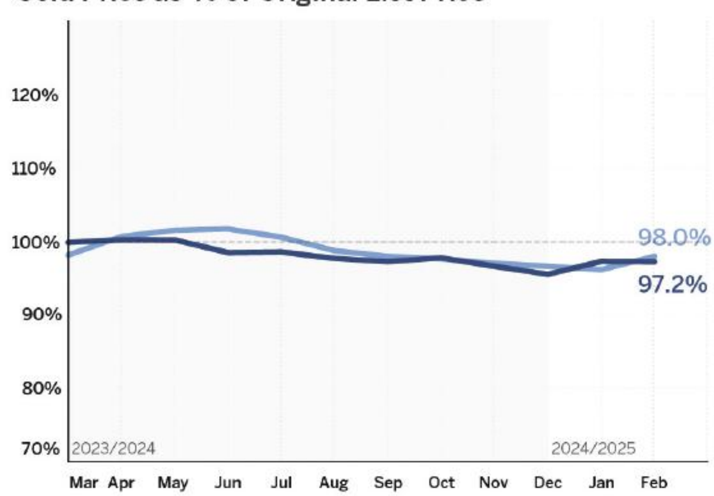
Median Price



Average Days on Market



Sold Price as % of Original List Price



Golden Gate | Sotheby's INTERNATIONAL REALTY

EAST BAY OFFICES

Berkeley Office **510.542.2600**	Oakland-Piedmont-Montclair **510.339.4000**	Danville Office **925.838.9700**
North Berkeley Office **510.883.7000**	Lafayette Office **925.283.7866**	Elmwood Office **510.883.7000**

MARIN OFFICES

Belvedere - Tiburon Office **415.435.0700**	Ross Valley Office **415.461.7200**	Sausalito Office **415.331.9000**
Drakes Landing Office **415.464.9300**	San Rafael Office **415.456.1200**	Southern Marin Office **415.381.7300**
	Stinson Beach Office **415.868.9200**	

PENINSULA / SILICON VALLEY OFFICES

Burlingame **650.865.3000**	Los Altos Office **650.941.4300**	Los Gatos **408.358.2800**
Menlo Park Office **650.847.1141**	Woodside Office **650.851.6600**	San Carlos **650.597.1800**

WINE COUNTRY OFFICES

Napa Downtown **707.690.9500**	Napa **707.255.0845**

GOLDENGATESIR.COM