Golden Gate | Sotheby's INTERNATIONAL REALTY

Market Report

January 2025

SAN FRANCISCO BAY AREA

Cover Home:
995 Matadero Avenue, Palo Alto
$15,500,000

The San Francisco Bay Area Housing Market

Welcome to our January 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.

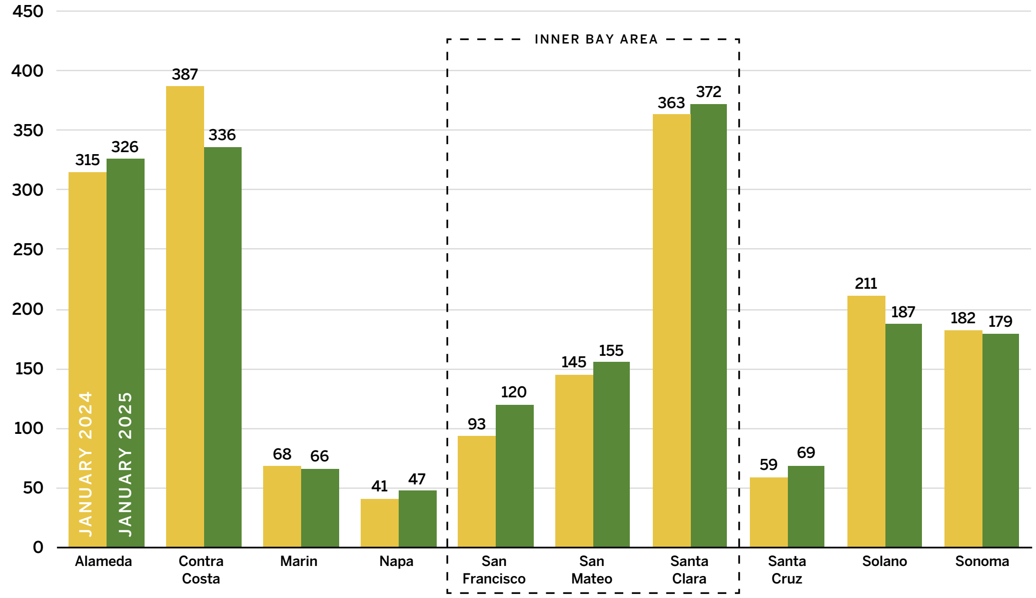
MORE INVENTORY AND JOB GROWTH POINT TO STRONG START

More homes came onto the market in the SF Bay Area in January, potentially paving the way for a strong spring buying season. One of the primary constraints on the housing market in the last year has been a low number of homes for sale. SF Bay Area workers continued to return to the office in greater numbers, which helped bolster demand for homes in the inner SF Bay Area. Across the region, SF Bay Area employers added nearly 12,000 jobs in 2024. The unemployment rate remained tight at 4.4%, which also supported wage growth of nearly 4%. The combination of stronger job growth in 2025 and more aggressive return-to-office requirements may support even stronger buyer demand in the coming months.

While sales were stable compared with one year ago, the inventory of homes for sale jumped in a

Sales Increase in Inner Bay Area Year-over-Year

SINGLE FAMILY HOMES SOLD BY COUNTY · JAN 2024 VS. JAN 2025



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

sign of potential optimism among sellers. Inventory typically builds into the spring buying season, but the January increase was particularly large relative to the last few years. More than 4,500 homes were available for sale in January across the SF Bay Area, which was 1,000 more homes than last month and nearly 1,700 more than last year. The East Bay accounted for the bulk of this increase, while inventory was more stable on the Peninsula. More broadly, the increase in inventory may also signal a shift towards greater equilibrium after the sellers' market of recent months.

SALES DRIVEN BY SEASONAL PATTERNS, INTEREST RATES, AND RETURN-TO-OFFICE TRENDS

As people returned from the holidays and winter weather set in, home sales slowed from December. However, with nearly 1,900 homes sold, sales were still on par with last January. Sales of higher priced homes bolstered overall sales totals, while higher mortgage rates and reduced affordability dampened sales in the lower price segments. More than 230 homes sold for $2.5 million or more in January, a 13% increase compared with last year. Meanwhile, sales of homes priced at less than $1.25 million declined by 6%. Sales in the middle price segment, from $1.25 to $2.5 million, increased by 5%. County sales figures reflected similar trends, though the stronger return-to-office trend spurred additional buyer activity in inner SF Bay Area neighborhoods. Sales in San Francisco County surged by 29% year-over-year. Buyer activity in Santa Cruz and Napa counties—where vacation homes typically account for a greater share of sales—was also much stronger than last year. Conversely, there were fewer sales in Contra Costa and Solano counties.

HIGHER INVENTORY YIELDS MORE BALANCED MARKET

While competition for homes was still relatively strong, especially in premier neighborhoods, buyers also had more options to choose from in January. As a result, the housing market moved closer to equilibrium, with homes spending slightly longer on the market and a larger share selling at the list price. Following the lull around the holidays, the average length of time homes spent on the market increased to 43 days in January. This was slightly longer than last year, but less than would be considered typical for January. The share of homes that sold for the asking price also increased to 9% in January, the largest share since late 2020. Meanwhile, the share of homes sold for more than the asking price decreased to 44%. This share was greater than last year, but much less than the long-term average of 56%.

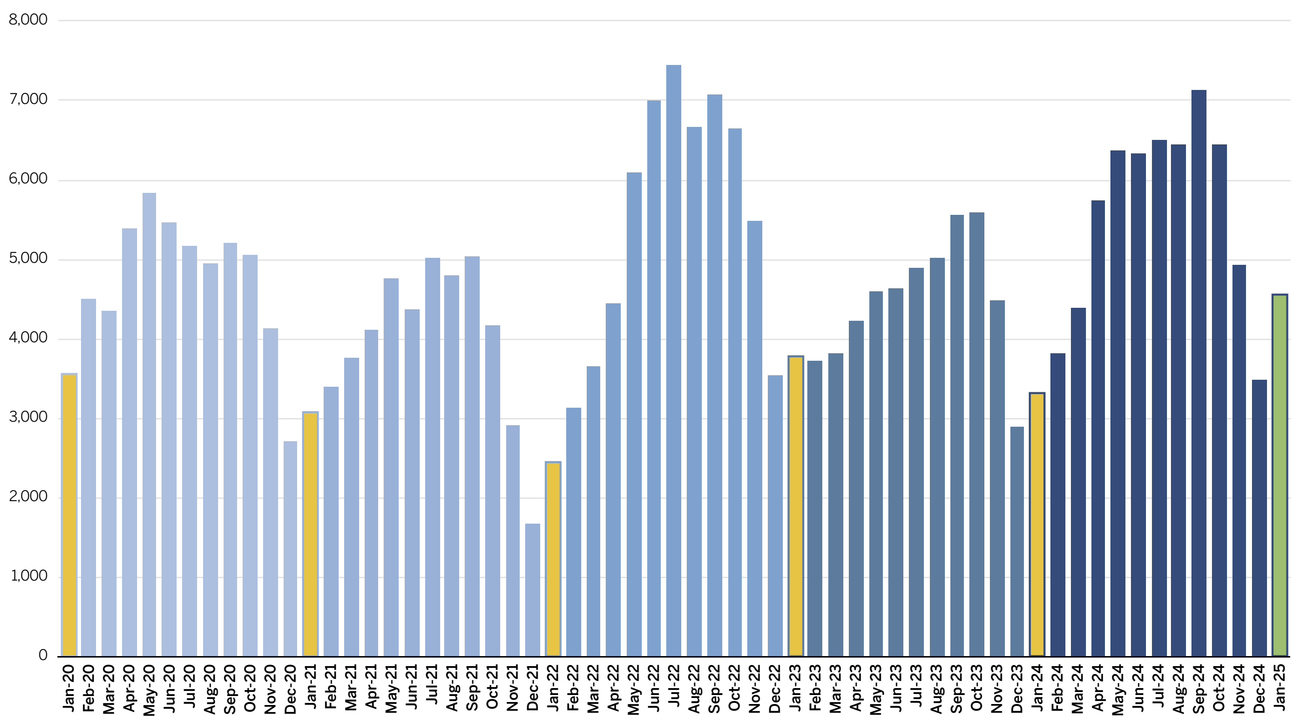
As seen with home sales data, the inner SF Bay Area outperformed for these metrics as competition accelerated. A larger share of inner SF Bay Area homes sold for more than the asking price compared with last year, while the average days spent on the market was stable or decreased.

LOOKING AHEAD

Overall, January highlighted the strong demand for homes close to job centers or schools and in prime neighborhoods, as well as the ongoing affordability challenges posed by higher mortgage rates. If mortgage rates remain stable, potential buyers may be more likely to accept this new reality and come off the sidelines. An increasing share of office workers should also return to the office in 2025, boosting demand for homes near transit and corporate clusters. These factors, along with greater job gains and positive stock market performance, would bolster the SF Bay Area housing market.

Listings Surge in January

TOTAL HOMES FOR SALE · SAN FRANCISCO BAY AREA · JAN 2020-JAN 2025



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

SALES BY COUNTY · SINGLE FAMILY HOMES

County	Median Price			Avg. Price per Sq. Foot			Number of Sales		
	Jan 2024	Jan 2025	Change	Jan 2024	Jan 2025	Change	Jan 2024	Jan 2025	Change
Alameda	$1,100,000	$1,126,500	2.4%	$711	$725	1.9%	315	326	3.5%
Contra Costa	$768,000	$784,500	2.1%	$499	$524	4.9%	387	336	-13.2%
Marin	$1,524,500	$1,422,500	-6.7%	$860	$817	-5.0%	68	66	-2.9%
Napa	$999,000	$955,000	-4.4%	$749	$612	-18.3%	41	47	14.6%
San Francisco	$1,530,000	$1,432,500	-6.4%	$957	$947	-1.0%	93	120	29.0%
San Mateo	$1,845,000	$1,800,000	-2.4%	$1,129	$1,135	0.6%	145	155	6.9%
Santa Clara	$1,700,000	$1,800,000	5.9%	$1,099	$1,152	4.8%	363	372	2.5%
Santa Cruz	$1,190,000	$1,199,000	0.8%	$744	$870	16.9%	59	69	16.9%
Solano	$575,000	$567,000	-1.4%	$344	$360	4.6%	211	187	-11.4%
Sonoma	$827,450	$820,000	-0.9%	$632	$535	-15.5%	182	179	-1.6%
SF Bay Area	**$1,116,820**	**$1,160,000**	**3.9%**	**$745**	**$773**	**3.8%**	**1864**	**1857**	**-0.4%**

PRICES MODERATE

While the median sales price moderated slightly in January, the price remained greater than last year. The SF Bay Area median sales price was $1.16 million as of January 2024, 4% greater than in 2024. At the county level, price growth was strongest in Santa Clara County at nearly 6% year-over-year, followed by Alameda and Contra Costa counties with price growth of slightly more than 2%. The median sales price was relatively stable in Santa Cruz and Sonoma counties, and declined in other counties in the region.

About Golden Gate Sotheby's International Realty

Golden Gate Sotheby's International Realty has over 425 agents in 21 offices throughout the San Francisco Bay Area serving the counties of Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma, and San Francisco.

About Rosen Consulting Group

Rosen Consulting Group was founded in 1990 by Dr. Kenneth T. Rosen to provide objective real estate market and economic advisory services. Today, Dr. Rosen and Randall Sakamoto are the partners and active managers of the firm consisting of 18 advisory professionals. In addition to serving as Chairman of RCG, Dr. Rosen is Chairman of the Fisher Center for Real Estate and Urban Economics and Professor Emeritus at the Haas School of Business at the University of California, Berkeley.

RCG

Golden Gate | Sotheby's INTERNATIONAL REALTY

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.

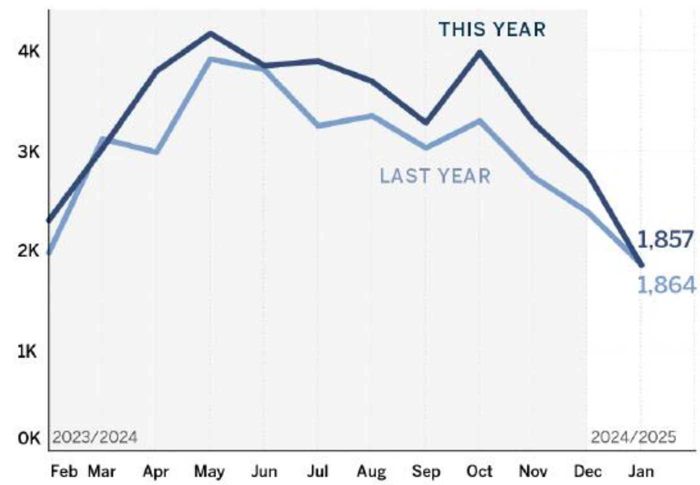
SAN FRANCISCO BAY AREA MARKET TRENDS

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.

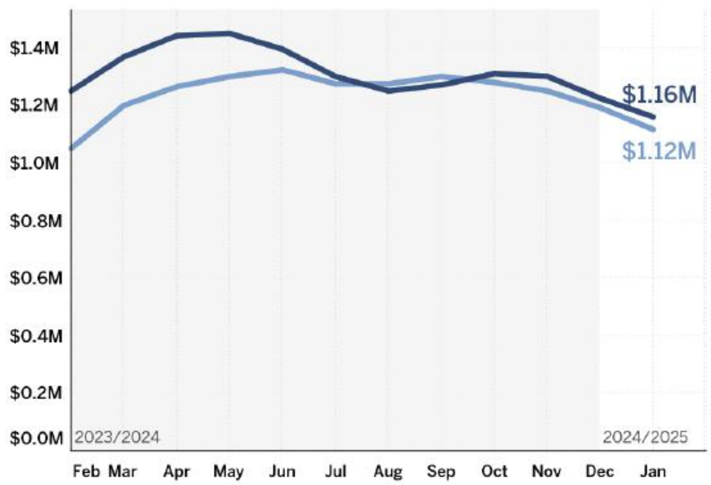
SAN FRANCISCO BAY AREA SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

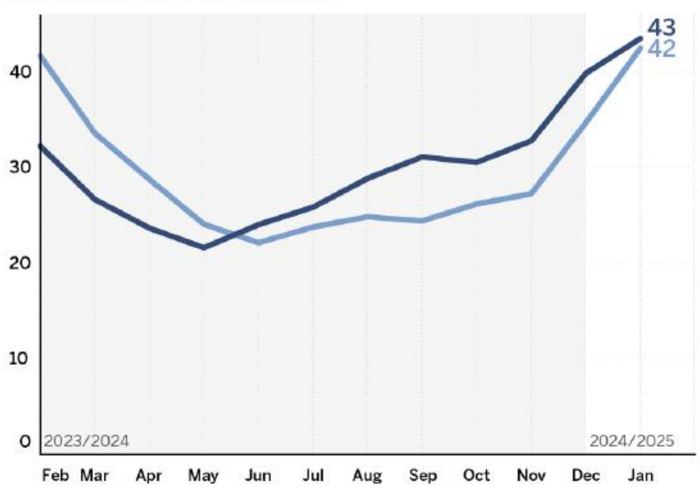
Homes Sold



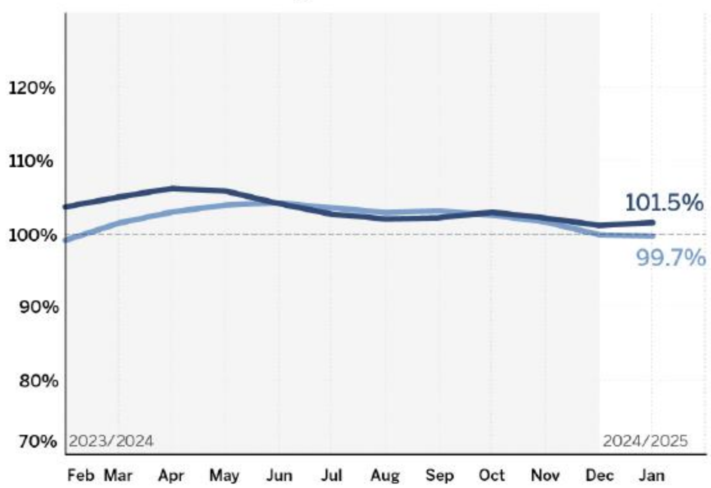
Median Price



Average Days on Market



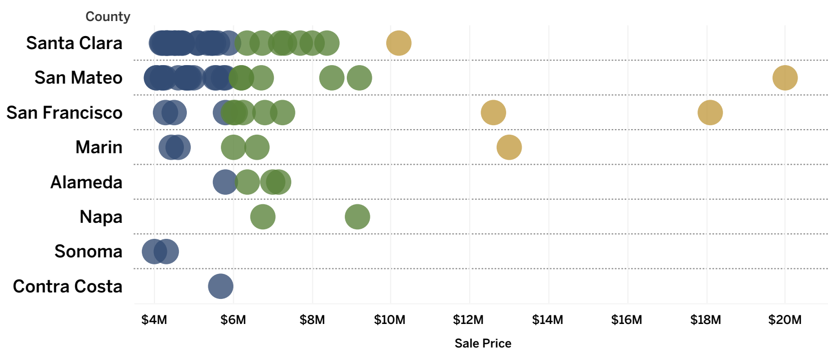
Sold Price as % of Original List Price



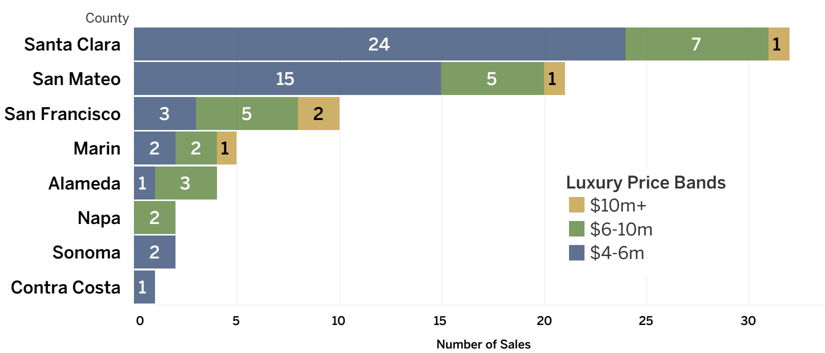
SAN FRANCISCO BAY AREA LUXURY MARKET - $4 MILLION AND ABOVE

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.

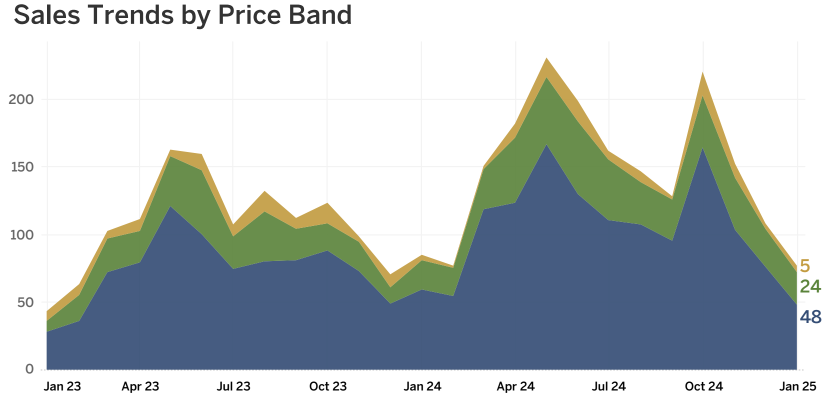
January 2025 Luxury Sales by County and Sale Price



January 2025 Luxury Sales by Price Band



Sales Trends by Price Band



FEATURED SALES

REPRESENTED BY GOLDEN GATE SOTHEBY'S INTERNATIONAL REALTY

$13,000,000
Eucalyptus Road, Belvedere

$7,000,000
Glen Alpine Road, Piedmont

$6,750,000
Spring Mountain Road, Saint Helena

$6,600,000
Cloud View Road, Sausalito

$5,750,000
Oakhurst Avenue, San Carlos

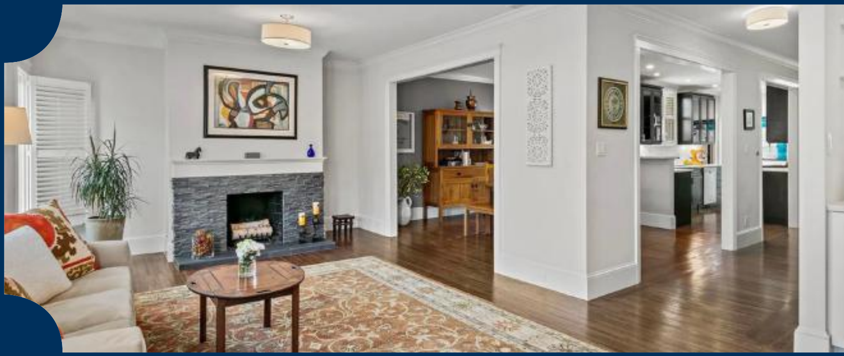
$5,600,000
Blanchard Drive, Monte Sereno

$4,350,000
La Vista Drive, Saratoga

$4,200,000
Grove Drive, Portola Valley

$4,050,000
Trinity Drive, Menlo Park

San Francisco
SINGLE FAMILY



SALES BY DISTRICT · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
District 1	$5,297,571	$2,440,000	102.9%	$18,100,000	$1,282	7	35
District 2	$1,694,948	$1,597,500	146.3%	$3,625,000	$1,014	20	28
District 3	$1,118,786	$1,150,000	118.1%	$1,344,500	$772	7	22
District 4	$2,293,182	$2,050,000	99.9%	$7,250,000	$988	11	45
District 5	$2,816,373	$2,576,000	101.0%	$6,250,000	$1,241	15	42
District 6	$2,539,194	$2,570,888	88.0%	$2,850,000	$952	4	51
District 7	$6,096,000	$4,500,000	90.5%	$12,600,000	$1,247	5	167
District 8	$3,000,000	$3,000,000	103.6%	$3,000,000	$1,480	1	6
District 9	$1,623,120	$1,506,250	103.2%	$3,289,500	$844	20	48
District 10	$1,020,072	$1,000,000	105.6%	$1,595,000	$703	30	40
San Francisco	**$2,108,211**	**$1,432,500**	**110.4%**	**$18,100,000**	**$947**	**120**	**44**

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

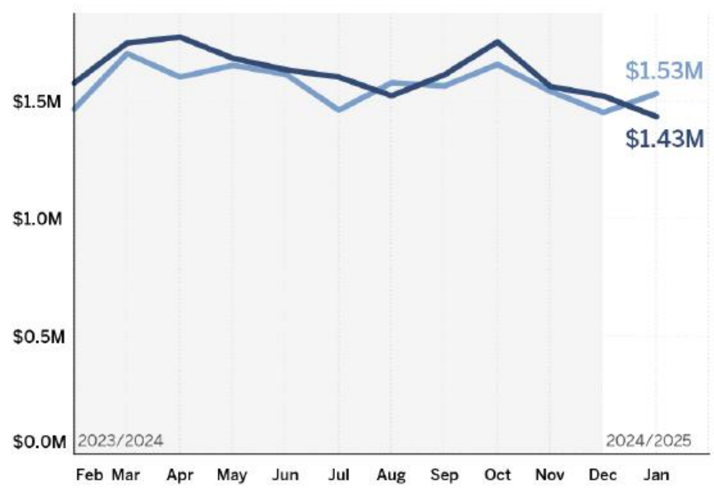
Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

SAN FRANCISCO COUNTY SINGLE FAMILY HOMES: JANUARY 2025

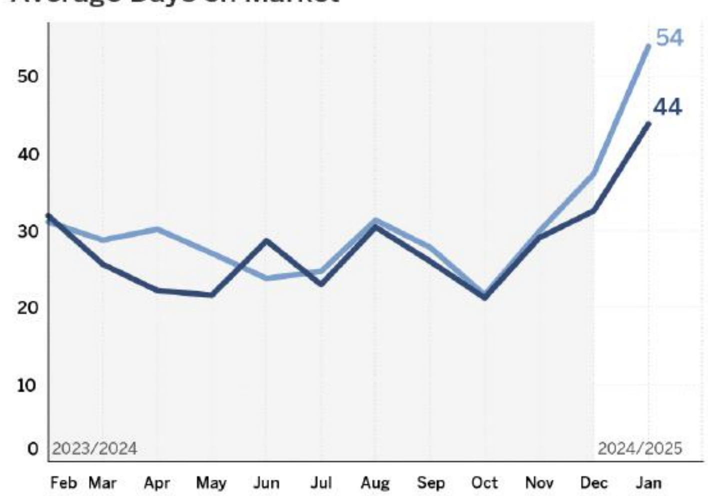
Distribution of Sales

Homes Sold

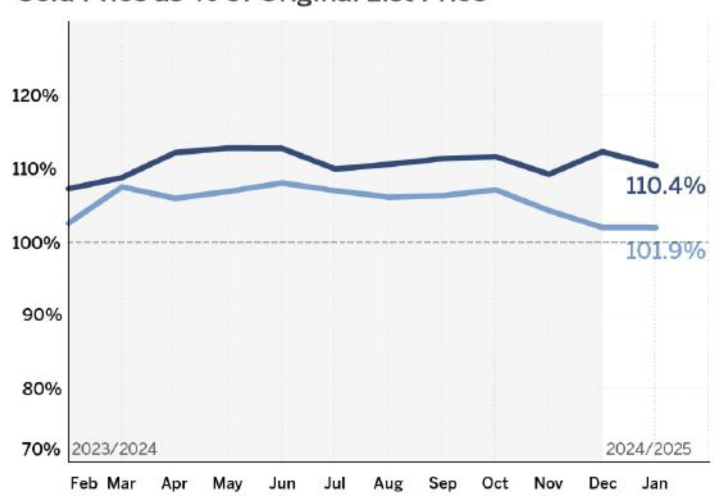
Median Price



Average Days on Market



Sold Price as % of Original List Price



San Francisco
CONDOS

SALES BY DISTRICT · CONDOS · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
District 1	$1,593,333	$1,695,000	106.7%	$2,300,000	$1,069	3	32
District 2	$1,060,000	$1,045,000	94.7%	$1,410,000	$649	3	78
District 3	$612,500	$612,500	101.1%	$675,000	$754	2	7
District 4	-	-	-	-	-	0	-
District 5	$1,190,066	$1,029,500	101.3%	$2,925,925	$1,021	14	56
District 6	$1,036,425	$922,500	96.2%	$1,860,000	$906	10	78
District 7	$2,017,083	$1,587,500	97.0%	$4,195,000	$1,183	12	45
District 8	$1,102,673	$917,500	95.3%	$3,450,000	$941	30	102
District 9	$1,269,489	$875,000	95.0%	$9,000,000	$949	47	97
District 10	$693,500	$702,000	94.3%	$840,000	$613	4	74
San Francisco	**$1,247,483**	**$962,000**	**96.4%**	**$9,000,000**	**$956**	**125**	**83**

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

Golden Gate | Sotheby's INTERNATIONAL REALTY

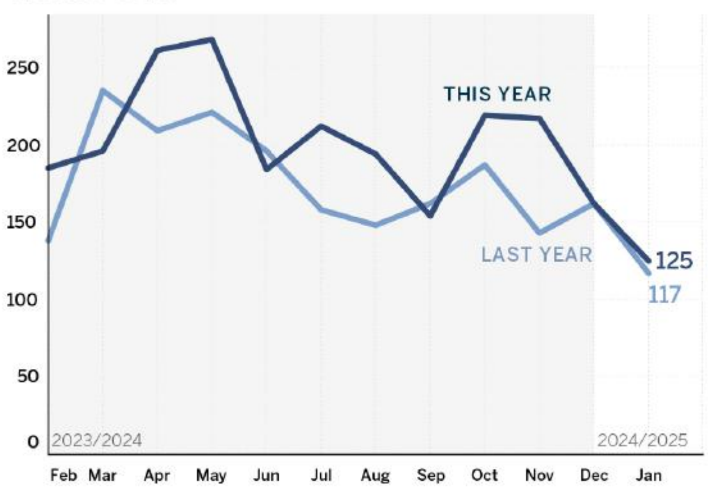
SAN FRANCISCO COUNTY CONDO MARKET TRENDS

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.

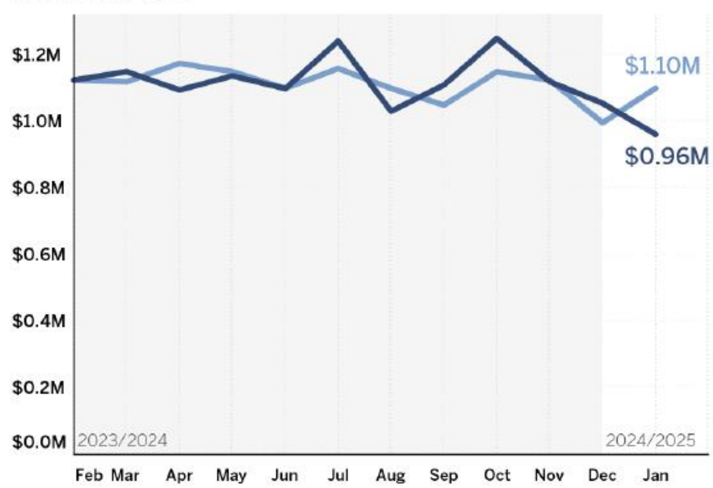
SAN FRANCISCO COUNTY CONDOS: JANUARY 2025

Distribution of Sales

Homes Sold

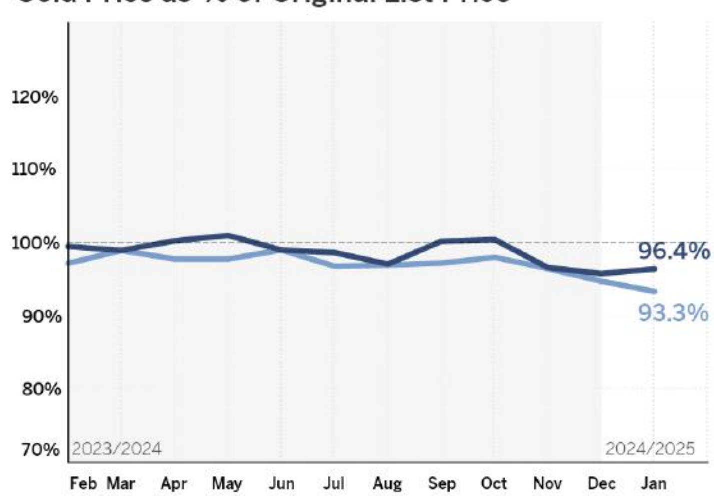


Median Price



Average Days on Market

Sold Price as % of Original List Price



Alameda

COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alameda	$1,306,475	$1,123,000	109.6%	$2,778,750	$769	10	17
Albany	$1,055,000	$1,055,000	113.7%	$1,210,000	$1,061	2	80
Berkeley	$1,507,915	$1,500,000	106.1%	$2,450,000	$827	17	34
Castro Valley	$1,248,688	$1,232,500	102.1%	$1,862,000	$754	16	28
Dublin	$1,919,375	$1,807,500	100.5%	$3,450,000	$811	10	19
Emeryville	$490,000	$490,000	108.9%	$490,000	$280	1	4
Fremont	$1,832,304	$1,745,000	107.6%	$3,258,000	$1,098	23	14
Hayward	$1,006,412	$950,000	102.1%	$1,905,000	$692	34	33
Livermore	$1,242,394	$1,165,000	101.2%	$2,350,000	$739	33	27
Newark	$1,476,386	$1,485,000	105.7%	$1,820,000	$955	11	15
Oakland	$950,709	$781,000	101.2%	$3,850,000	$566	102	48
Piedmont	$4,973,750	$5,247,500	89.1%	$7,150,000	$881	4	77
Pleasanton	$2,349,965	$1,840,000	98.7%	$6,355,500	$875	20	23
San Leandro	$824,450	$825,500	97.1%	$1,075,000	$616	20	36
San Lorenzo	$885,543	$855,000	103.4%	$1,100,000	$673	9	15
Sunol	-	-	-	-	-	0	-
Union City	$1,536,214	$1,461,000	103.5%	$2,500,000	$798	14	24
Alameda County	**$1,300,322**	**$1,126,500**	**102.1%**	**$7,150,000**	**$725**	**326**	**34**

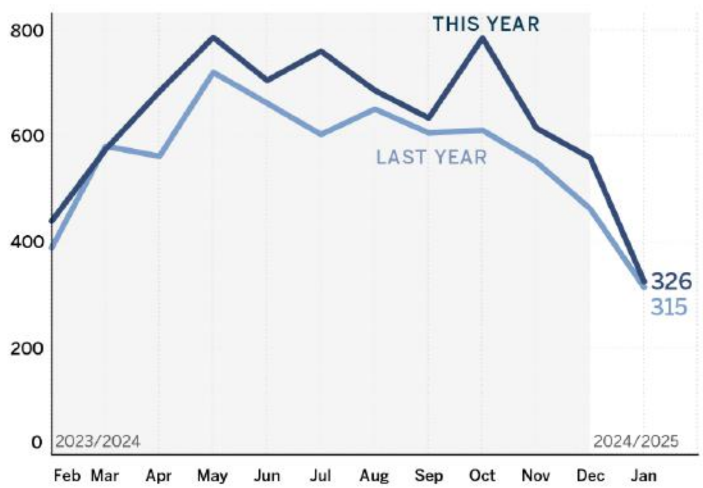
ALAMEDA COUNTY MARKET TRENDS

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.

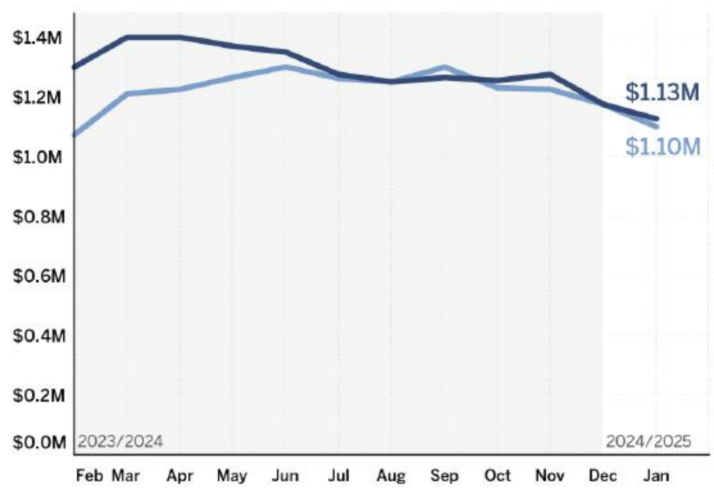
ALAMEDA COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

Homes Sold

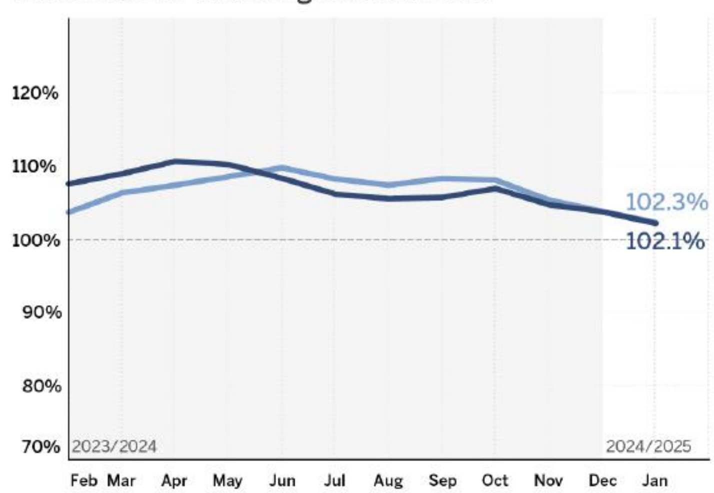


Median Price



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 · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alamo	$2,290,946	$2,200,000	106.4%	$3,275,000	$748	7	32
Antioch	$615,069	$592,500	99.0%	$980,000	$338	50	39
Bay Point	$526,250	$550,000	98.9%	$640,000	$340	4	33
Bethel Island	$652,500	$652,500	88.7%	$890,000	$625	2	108
Brentwood	$880,873	$840,000	96.1%	$1,525,000	$404	31	41
Byron	-	-	-	-	-	0	-
Canyon	-	-	-	-	-	0	-
Clayton	$893,000	$893,000	95.1%	$893,000	$514	1	71
Concord	$850,934	$844,500	100.3%	$1,600,000	$528	38	35
Crockett	-	-	-	-	-	0	-
Danville	$2,364,875	$1,985,000	95.4%	$5,680,000	$822	20	55
Diablo	-	-	-	-	-	0	-
Discovery Bay	$819,893	$739,000	96.1%	$1,350,000	$342	14	66
El Cerrito	$1,265,500	$1,301,000	142.9%	$1,770,000	$843	6	13
El Sobrante	$772,143	$740,000	93.7%	$1,150,000	$445	7	50
Hercules	$974,000	$974,000	99.2%	$998,000	$385	2	37
Kensington	$1,915,000	$2,000,000	113.8%	$2,550,000	$840	3	50
Knightsen	-	-	-	-	-	0	-
Lafayette	$2,154,000	$2,190,000	97.0%	$2,655,000	$913	5	58
Martinez	$815,353	$789,000	99.2%	$1,000,000	$501	17	30
Moraga	$1,713,000	$1,700,000	100.2%	$1,789,000	$788	3	62
Oakley	$735,342	$700,000	97.5%	$1,360,000	$334	19	61
Orinda	$1,946,250	$1,950,000	98.5%	$2,550,000	$783	4	29
Pacheco	-	-	-	-	-	0	-
Pinole	$899,000	$845,000	102.1%	$1,475,000	$539	5	48
Pittsburg	$540,098	$560,000	99.2%	$633,000	$391	21	36
Pleasant Hill	$1,143,750	$1,127,500	93.7%	$1,500,000	$589	8	42
Richmond	$641,442	$665,000	100.6%	$936,990	$532	23	33
Rodeo	$682,500	$715,000	96.4%	$835,000	$523	6	61
San Pablo	$611,800	$602,000	101.9%	$845,000	$536	10	21
San Ramon	$1,966,800	$1,800,000	98.8%	$3,856,000	$795	15	22
Walnut Creek	$1,654,193	$1,465,000	98.9%	$3,575,000	$811	15	31
Contra Costa County	**$1,029,754**	**$784,500**	**99.4%**	**$5,680,000**	**$524**	**336**	**40**

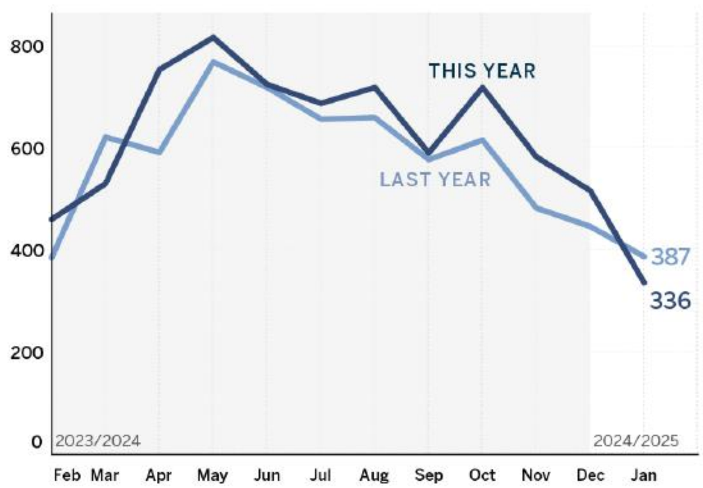
CONTRA COSTA COUNTY MARKET TRENDS

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.

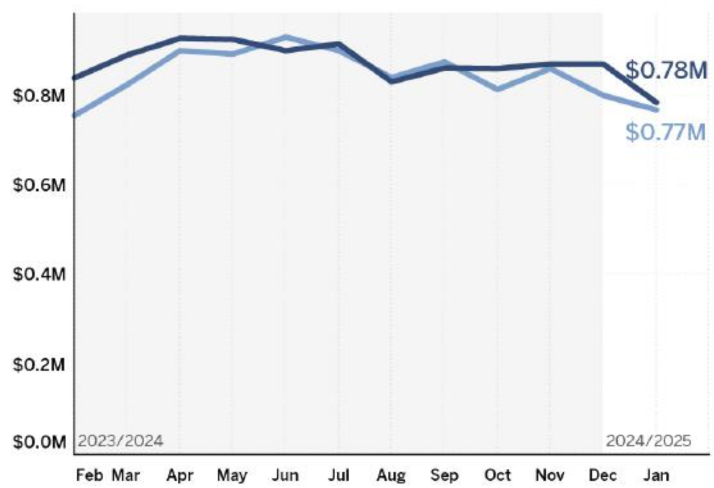
CONTRA COSTA COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

Homes Sold

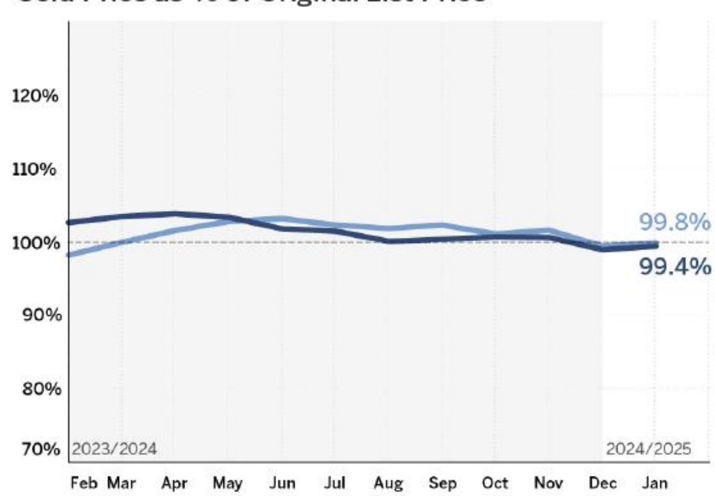


Median Price



Average Days on Market

Sold Price as % of Original List Price



Marin
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Belvedere	$9,503,500	$9,503,500	98.2%	$13,000,000	$2,221	2	160
Bolinas	$1,362,500	$1,362,500	100.2%	$1,850,000	$1,229	2	40
Corte Madera	$1,510,000	$1,510,000	102.3%	$1,820,000	$1,006	2	62
Dillon Beach	$2,050,000	$2,050,000	95.3%	$2,050,000	$782	1	217
Fairfax	$1,222,143	$1,225,000	94.8%	$1,450,000	$727	7	113
Fallon	-	-	-	-	-	0	-
Forest Knolls	-	-	-	-	-	0	-
Greenbrae	-	-	-	-	-	0	-
Inverness	-	-	-	-	-	0	-
Kentfield	-	-	-	-	-	0	-
Lagunitas	-	-	-	-	-	0	-
Larkspur	-	-	-	-	-	0	-
Marshall	-	-	-	-	-	0	-
Mill Valley	$1,535,286	$1,650,000	96.4%	$2,650,000	$842	7	283
Muir Beach	-	-	-	-	-	0	-
Nicasio	-	-	-	-	-	0	-
Novato	$1,242,345	$1,150,000	95.8%	$1,899,000	$563	11	49
Olema	-	-	-	-	-	0	-
Pt. Reyes Station	-	-	-	-	-	0	-
Ross	$3,800,000	$3,800,000	88.5%	$3,800,000	$888	1	54
San Anselmo	$1,996,333	$1,560,000	88.8%	$4,600,000	$846	6	90
San Geronimo	-	-	-	-	-	0	-
San Rafael	$1,774,876	$1,525,000	98.0%	$4,425,000	$735	21	52
Sausalito	$2,836,288	$1,702,575	92.6%	$6,600,000	$1,184	4	83
Stinson Beach	-	-	-	-	-	0	-
Tiburon	-	-	-	-	-	0	-
Tomales	-	-	-	-	-	0	-
Woodacre	$648,000	$648,000	78.5%	$932,000	$465	2	79
Marin County	**$1,900,929**	**$1,422,500**	**95.4%**	**$13,000,000**	**$817**	**66**	**94**

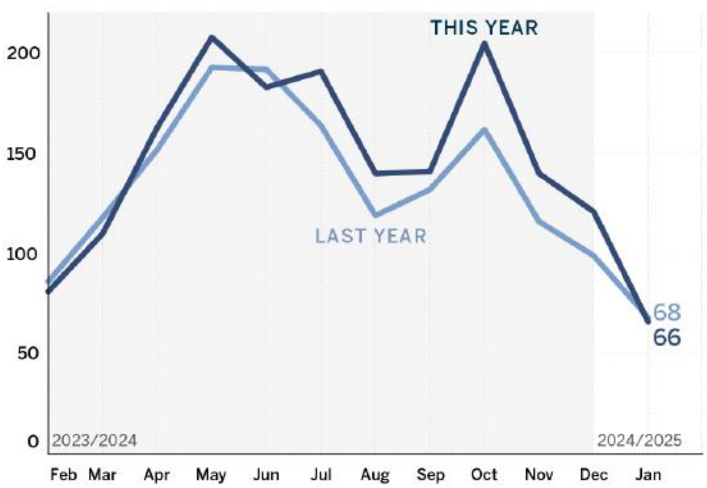
MARIN COUNTY MARKET TRENDS

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.

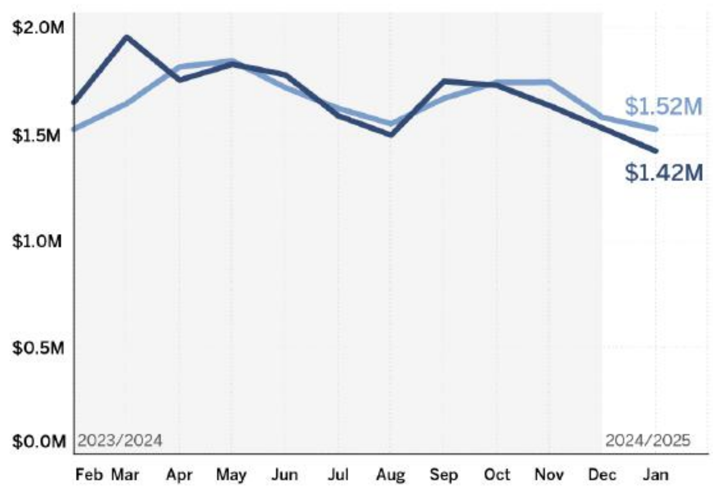
MARIN COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

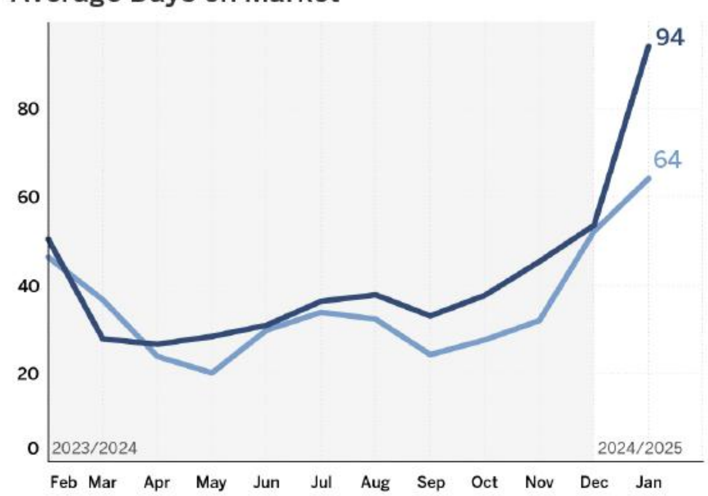
Homes Sold



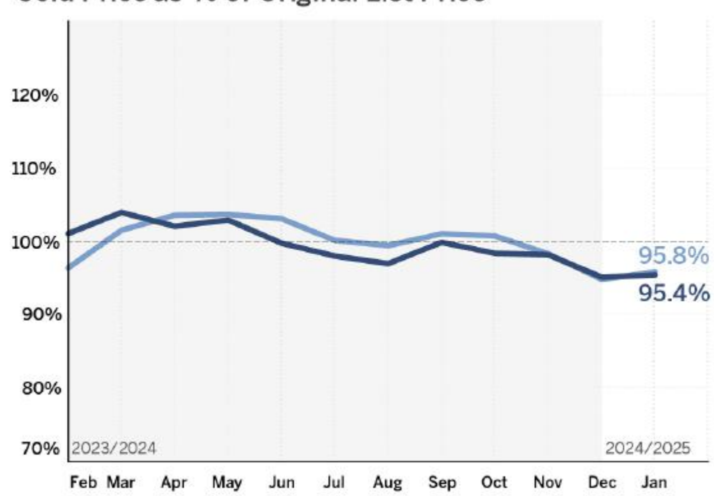
Median Price



Average Days on Market



Sold Price as % of Original List Price



Napa
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
American Canyon	$797,500	$817,500	96.8%	$980,000	$306	6	44
Angwin	-	-	-	-	-	0	-
Calistoga	$1,695,000	$1,695,000	87.0%	$1,695,000	$472	1	315
Deer Park	-	-	-	-	-	0	-
Napa	$1,354,529	$880,000	95.7%	$9,150,000	$653	35	84
Oakville	-	-	-	-	-	0	-
Pope Valley	-	-	-	-	-	0	-
Rutherford	-	-	-	-	-	0	-
St. Helena	$2,438,665	$1,445,000	81.5%	$6,750,000	$717	5	177
Yountville	-	-	-	-	-	0	-
Napa County	**$1,405,997**	**$955,000**	**94.1%**	**$9,150,000**	**$612**	**47**	**93**

NAPA COUNTY MARKET TRENDS

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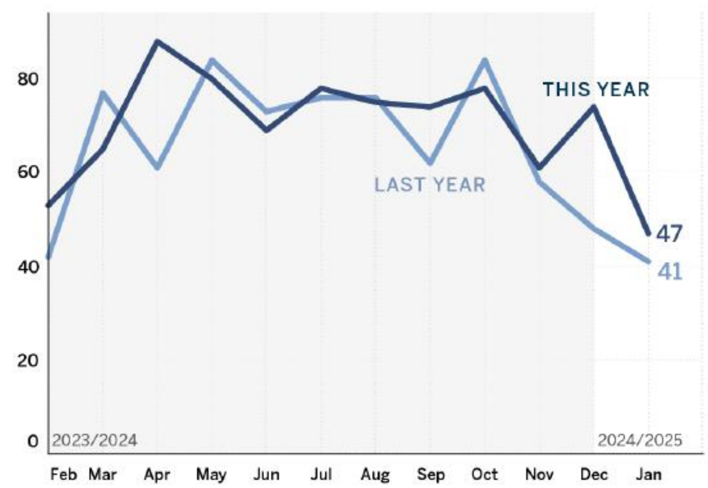
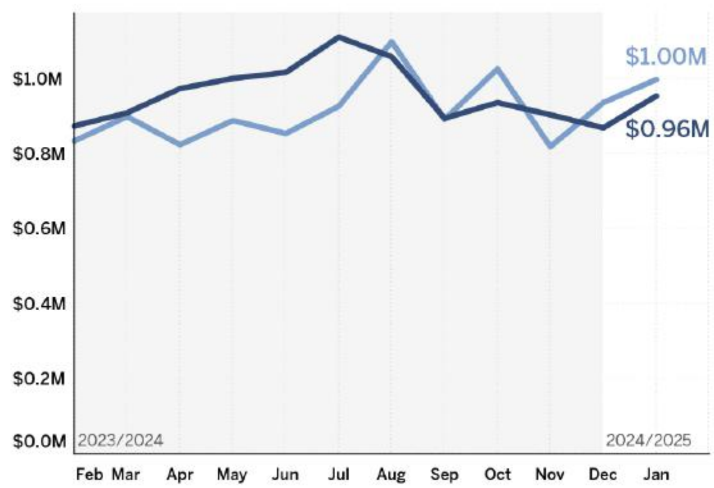
NAPA COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

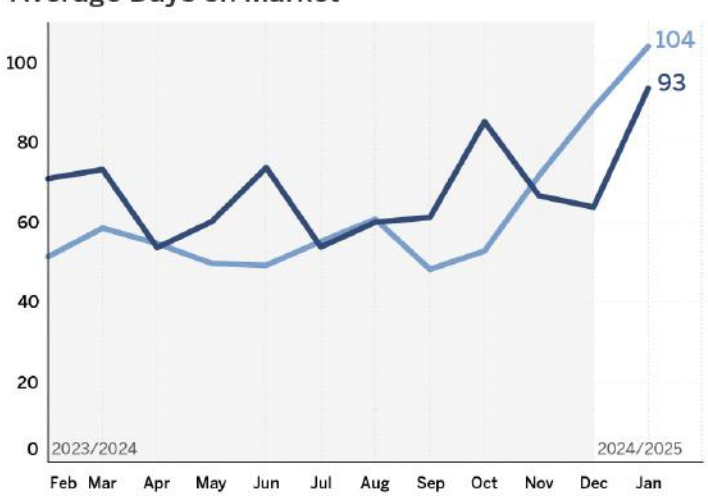
Homes Sold



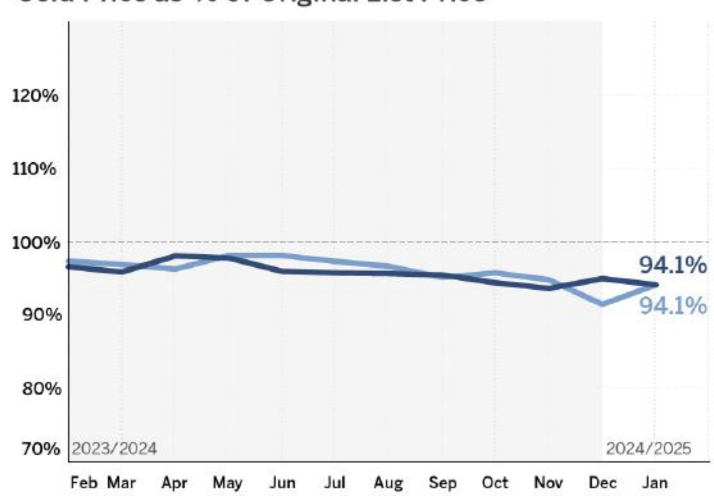
Median Price



Average Days on Market



Sold Price as % of Original List Price



San Mateo
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Atherton	$9,576,667	$5,530,000	92.3%	$20,000,000	$1,827	3	113
Belmont	$2,448,600	$2,625,000	101.1%	$2,700,000	$1,114	5	13
Brisbane	$1,350,000	$1,350,000	106.4%	$1,720,000	$1,030	2	49
Burlingame	$3,794,222	$4,200,000	100.2%	$4,995,000	$1,481	9	41
Colma	$1,550,000	$1,550,000	91.3%	$1,550,000	$728	1	115
Daly City	$1,203,667	$1,180,000	107.9%	$1,800,000	$816	12	24
East Palo Alto	$1,040,000	$1,040,000	106.4%	$1,280,000	$867	2	10
El Granada	$1,310,000	$1,310,000	90.3%	$1,370,000	$802	2	79
Foster City	$2,472,500	$2,552,500	107.6%	$2,900,000	$1,200	6	9
Half Moon Bay	$1,360,000	$1,360,000	92.2%	$1,360,000	$919	1	139
Hillsborough	$6,052,500	$6,005,000	94.7%	$8,500,000	$1,544	4	29
La Honda	$1,190,000	$1,190,000	99.2%	$1,190,000	$441	1	50
Loma Mar	$350,000	$350,000	100.0%	$350,000	$583	1	71
Menlo Park	$3,352,500	$3,250,000	97.9%	$4,800,000	$1,236	4	33
Millbrae	$2,223,315	$1,901,000	105.5%	$3,200,000	$1,099	6	46
Montara	$1,502,000	$1,502,000	85.1%	$1,502,000	$587	1	187
Moss Beach	$2,300,000	$2,300,000	80.7%	$2,300,000	$1,597	1	46
Pacifica	$1,456,154	$1,350,000	102.8%	$2,300,000	$957	13	51
Pescadero	-	-	-	-	-	0	-
Portola Valley	$4,722,500	$4,125,000	99.2%	$9,200,000	$1,603	6	43
Redwood City	$2,151,277	$2,050,000	104.6%	$4,050,000	$1,172	23	31
Redwood Shores	$2,080,000	$2,080,000	104.6%	$2,080,000	$1,809	1	18
San Bruno	$1,328,000	$1,280,000	99.2%	$1,700,000	$930	11	24
San Carlos	$2,937,557	$2,569,125	102.8%	$5,750,000	$1,307	11	25
San Gregorio	-	-	-	-	-	0	-
San Mateo	$2,066,277	$1,769,441	110.2%	$4,260,000	$1,199	14	15
South San Francisco	$1,226,311	$1,188,000	108.1%	$1,785,000	$898	9	30
Woodside	$3,673,000	$3,322,500	92.8%	$6,710,000	$1,056	6	78
San Mateo County	**$2,443,613**	**$1,800,000**	**102.7%**	**$20,000,000**	**$1,135**	**155**	**37**

SAN MATEO COUNTY MARKET TRENDS

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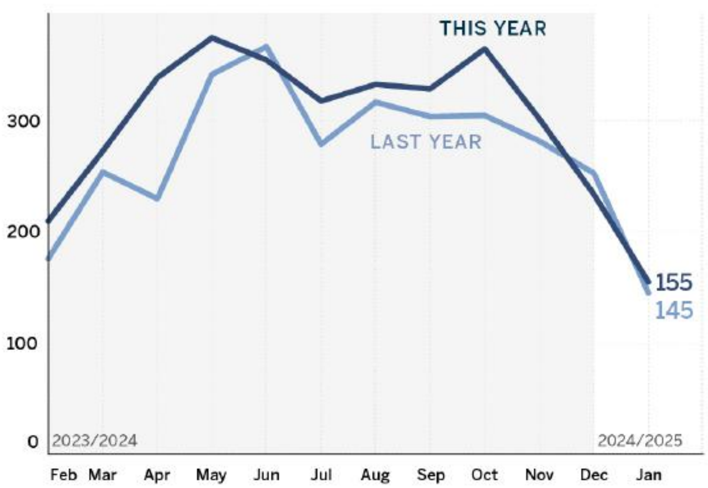
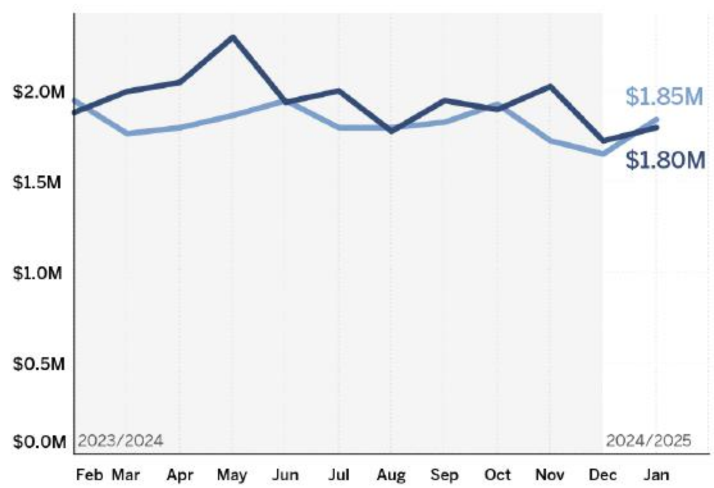
SAN MATEO COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

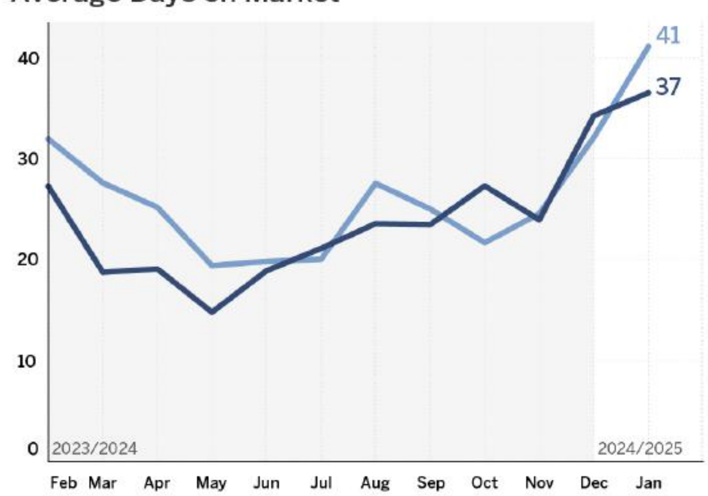
Homes Sold



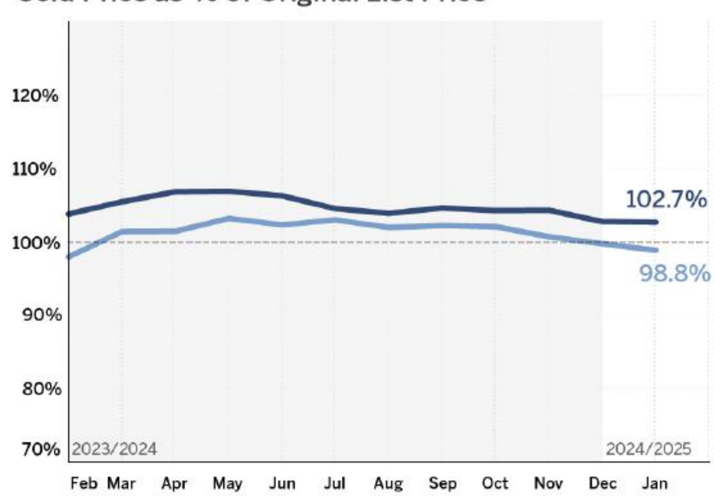
Median Price



Average Days on Market



Sold Price as % of Original List Price



Santa Clara
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Campbell	$2,026,429	$1,890,000	99.6%	$2,900,000	$1,284	7	19
Cupertino	$3,401,227	$3,200,000	108.1%	$5,350,000	$1,646	11	20
Gilroy	$1,179,857	$1,100,000	99.4%	$2,200,000	$568	25	41
Los Altos	$5,639,937	$5,490,000	99.1%	$8,375,000	$1,817	8	36
Los Altos Hills	$5,630,000	$5,450,000	91.3%	$7,700,000	$1,460	3	60
Los Gatos	$3,340,150	$2,761,500	99.2%	$10,200,000	$1,431	20	50
Milpitas	$1,875,833	$1,665,500	104.9%	$3,294,000	$1,131	6	11
Monte Sereno	$4,717,500	$4,717,500	94.8%	$5,600,000	$1,483	2	62
Morgan Hill	$1,776,257	$1,387,556	99.2%	$5,450,000	$768	22	38
Mountain View	$2,723,413	$2,825,000	108.7%	$3,550,000	$1,755	7	16
Palo Alto	$5,011,786	$4,200,000	100.3%	$8,000,000	$2,350	7	45
San Jose	$1,809,623	$1,620,000	110.5%	$5,500,000	$1,026	199	21
San Martin	$1,101,000	$1,101,000	80.6%	$1,200,000	$641	2	55
Santa Clara	$1,900,045	$1,752,500	106.7%	$3,420,000	$1,338	24	16
Saratoga	$3,908,222	$4,275,000	103.9%	$5,100,000	$1,605	18	16
Stanford	$3,175,000	$3,175,000	96.3%	$3,175,000	$1,214	1	72
Sunnyvale	$2,624,389	$2,754,444	117.6%	$3,700,000	$1,664	10	8
Santa Clara County	**$2,235,232**	**$1,800,000**	**106.9%**	**$10,200,000**	**$1,152**	**372**	**25**

SANTA CLARA COUNTY MARKET TRENDS

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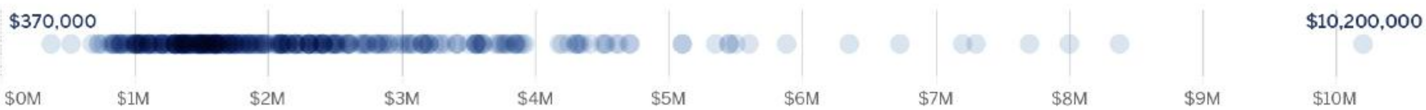
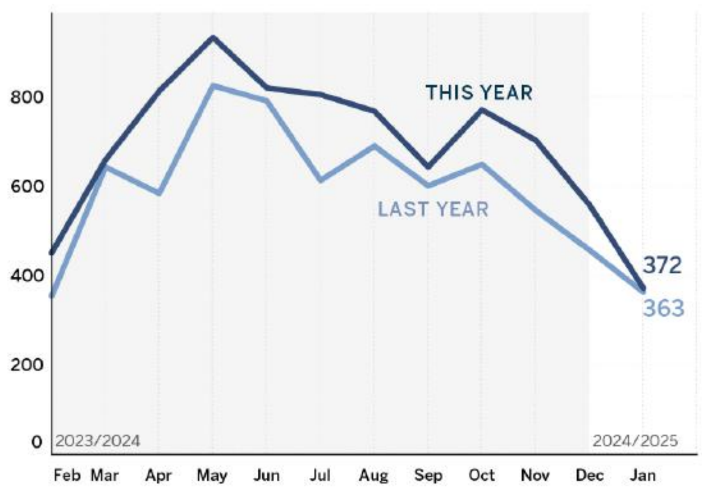
SANTA CLARA COUNTY SINGLE FAMILY HOMES: JANUARY 2025

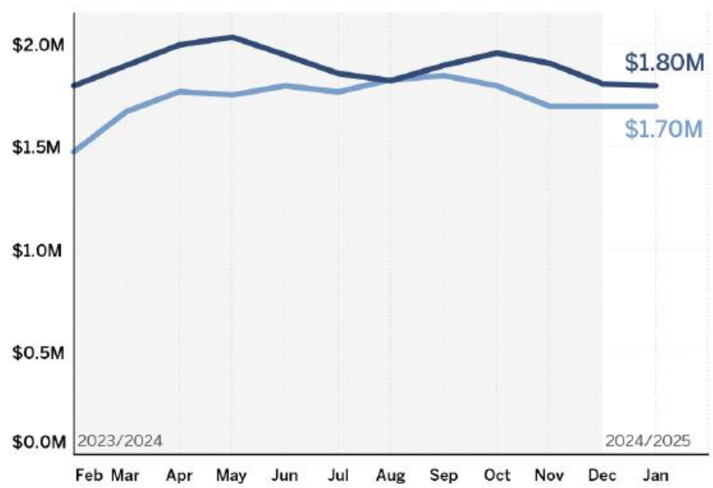
Distribution of Sales



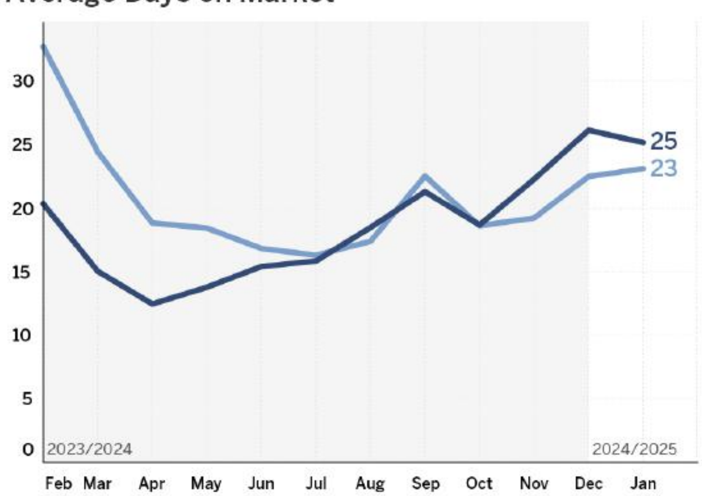
Homes Sold



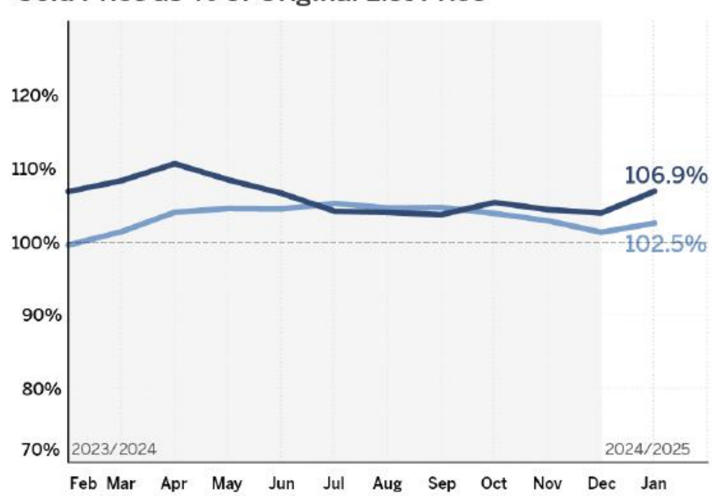
Median Price



Average Days on Market



Sold Price as % of Original List Price



Santa Cruz
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Aptos	$1,452,857	$1,330,000	100.2%	$2,575,000	$895	7	45
Ben Lomond	$1,013,000	$1,022,500	95.1%	$1,199,000	$693	4	53
Boulder Creek	$623,786	$675,000	95.0%	$825,000	$534	7	42
Brookdale	-	-	-	-	-	0	-
Capitola	$1,400,000	$1,400,000	76.3%	$1,400,000	$3,182	1	167
Corralitos	-	-	-	-	-	0	-
Davenport	-	-	-	-	-	0	-
Felton	$705,371	$713,243	95.3%	$975,000	$600	4	33
Freedom	-	-	-	-	-	0	-
La Selva Beach	$1,685,000	$1,685,000	91.1%	$1,685,000	$1,091	1	56
Los Gatos	$1,725,000	$1,500,000	95.8%	$3,250,000	$737	5	99
Mount Hermon	-	-	-	-	-	0	-
Santa Cruz	$1,707,230	$1,425,000	94.1%	$3,700,000	$1,102	25	42
Scotts Valley	$1,053,875	$1,110,000	95.2%	$1,600,000	$646	8	38
Soquel	$1,160,000	$1,160,000	105.6%	$1,160,000	$631	1	10
Watsonville	$1,026,000	$823,000	100.4%	$2,200,000	$591	6	19
Santa Cruz County	**$1,326,779**	**$1,199,000**	**95.6%**	**$3,700,000**	**$870**	**69**	**46**

SANTA CRUZ COUNTY MARKET TRENDS

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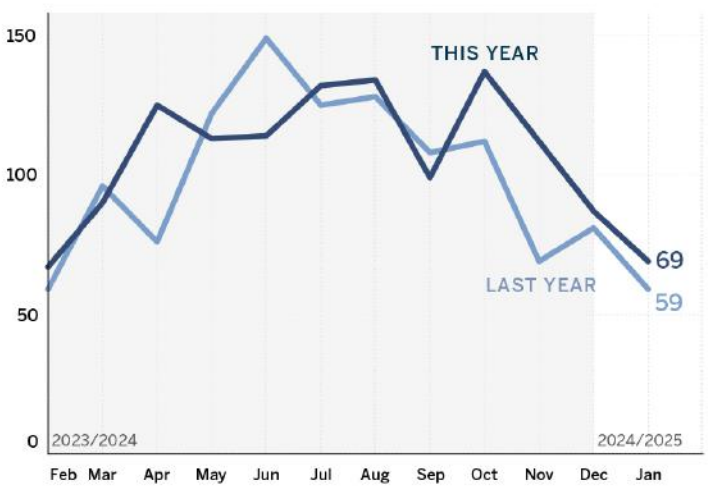
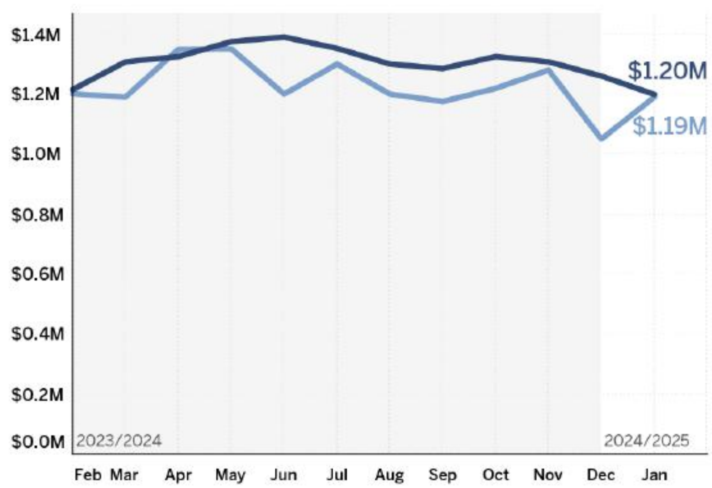
SANTA CRUZ COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

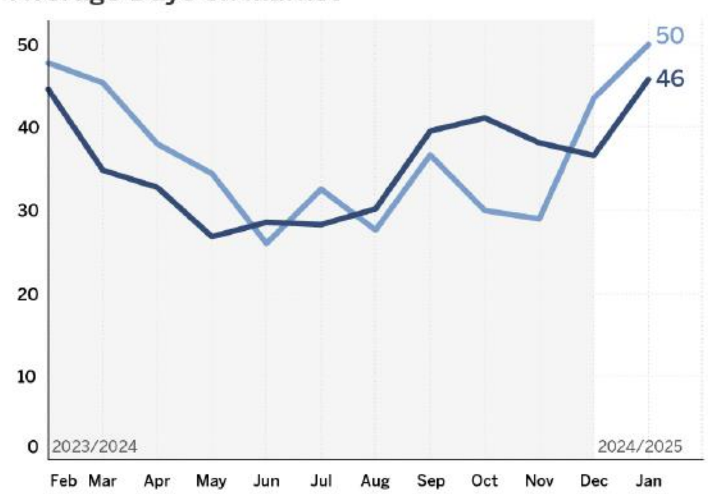
Homes Sold



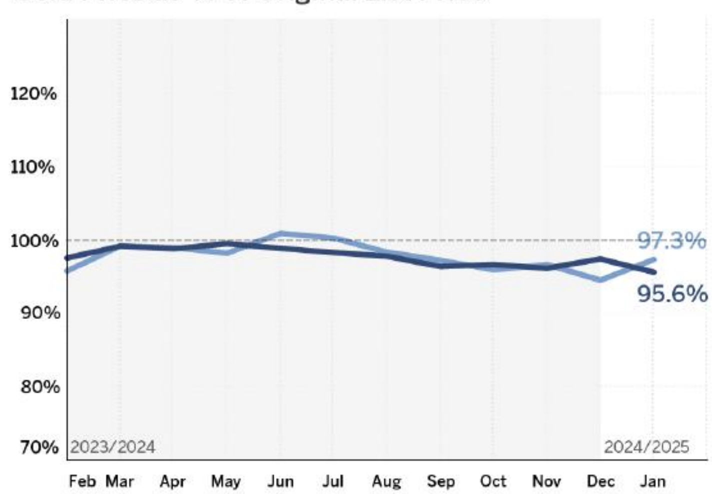
Median Price



Average Days on Market



Sold Price as % of Original List Price



Solano
COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Benicia	$952,971	$880,000	98.4%	$1,300,000	$474	7	45
Birds Landing	-	-	-	-	-	0	-
Dixon	$612,990	$599,000	94.9%	$740,000	$317	11	61
Elmira	-	-	-	-	-	0	-
Fairfield	$613,995	$585,000	97.5%	$1,000,000	$351	41	52
Rio Vista	$452,327	$431,500	95.4%	$660,000	$288	15	83
Suisun City	$549,538	$550,000	97.1%	$720,000	$348	13	52
Vacaville	$662,525	$642,955	98.3%	$1,516,000	$357	50	51
Vallejo	$525,364	$490,000	98.2%	$1,060,000	$382	49	64
Winters	$1,015,000	$1,015,000	82.9%	$1,015,000	$631	1	106
Solano County	**$601,072**	**$567,000**	**97.5%**	**$1,516,000**	**$360**	**187**	**58**

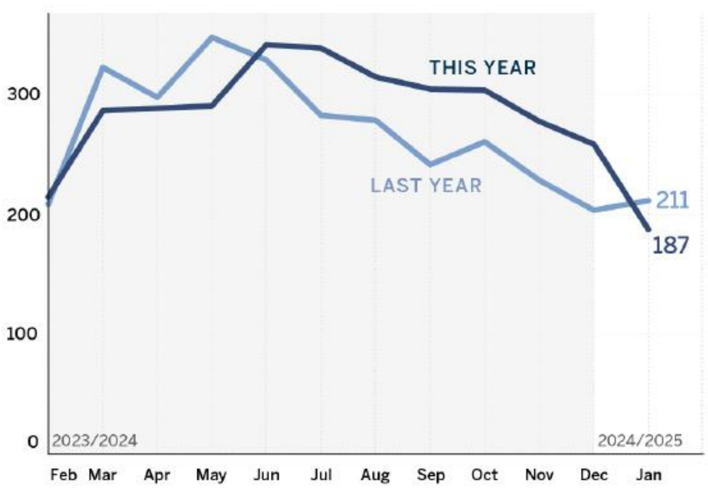
SOLANO COUNTY MARKET TRENDS

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.

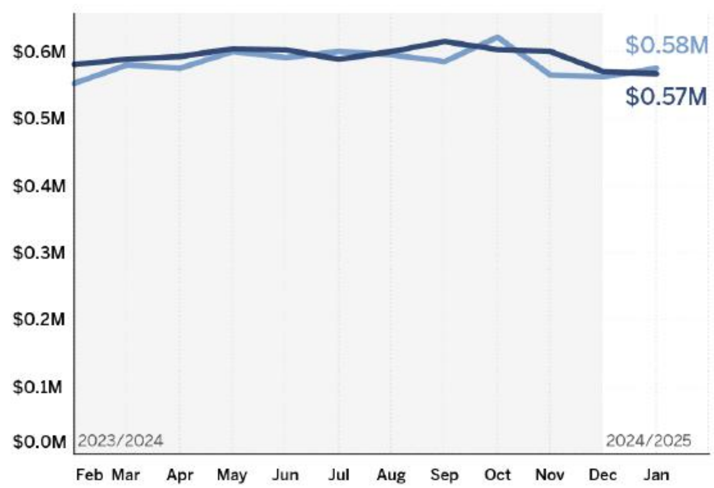
SOLANO COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

Homes Sold

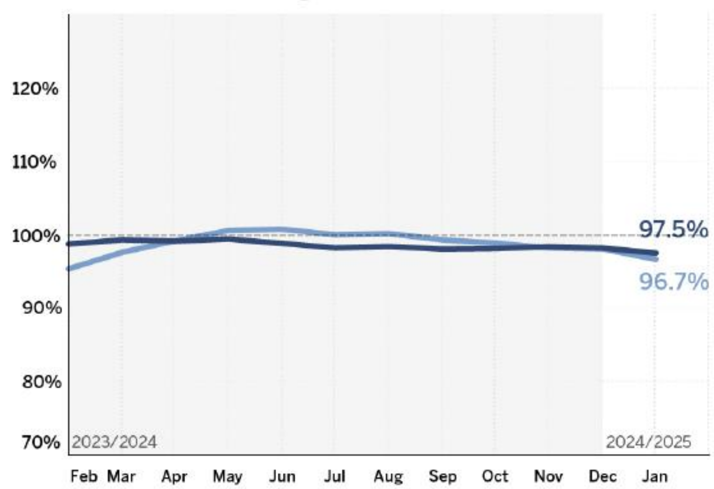


Median Price

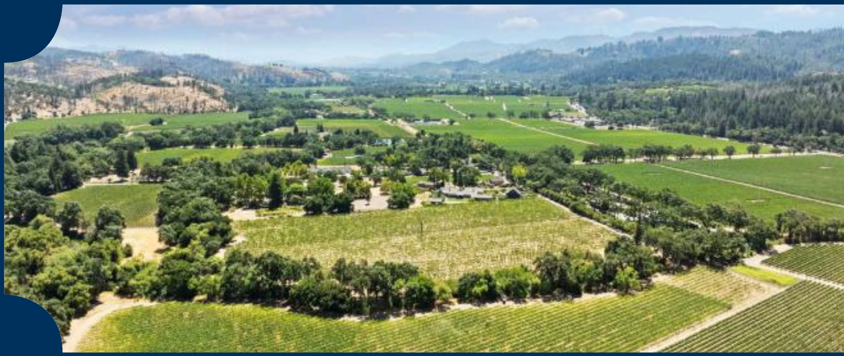


Average Days on Market

Sold Price as % of Original List Price



Sonoma
COUNTY



SALES BY CITY · SINGLE FAMILY HOMES · JANUARY 2025

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Annapolis	-	-	-	-	-	0	-
Bodega	-	-	-	-	-	0	-
Bodega Bay	$717,500	$717,500	87.0%	$920,000	$741	2	100
Camp Meeker	-	-	-	-	-	0	-
Cazadero	-	-	-	-	-	0	-
Cloverdale	$658,000	$675,000	96.3%	$740,000	$509	5	55
Cotati	$700,000	$700,000	100.7%	$770,000	$561	2	20
Duncan Mills	-	-	-	-	-	0	-
Forestville	$626,200	$680,000	98.6%	$960,000	$513	5	59
Freestone	-	-	-	-	-	0	-
Fulton	-	-	-	-	-	0	-
Geyserville	$400,000	$400,000	80.2%	$400,000	$277	1	101
Glen Ellen	$1,095,000	$1,095,000	91.6%	$1,700,000	$593	2	156
Graton	-	-	-	-	-	0	-
Guerneville	$530,500	$530,500	98.5%	$565,000	$359	2	70
Healdsburg	$1,604,222	$1,350,000	94.8%	$4,000,000	$765	9	42
Jenner	-	-	-	-	-	0	-
Kenwood	$1,750,000	$1,750,000	89.7%	$1,750,000	$565	1	112
Monte Rio	$763,333	$700,000	94.5%	$1,050,000	$649	3	143
Occidental	-	-	-	-	-	0	-
Penngrove	$990,000	$990,000	105.5%	$1,265,000	$864	2	48
Petaluma	$977,550	$877,500	100.4%	$1,850,000	$582	26	49
Rio Nido	-	-	-	-	-	0	-
Rohnert Park	$779,452	$771,575	100.5%	$935,000	$436	12	42
Santa Rosa	$945,682	$770,000	97.4%	$4,300,000	$497	65	70
Sebastopol	$1,195,000	$1,060,000	93.0%	$1,900,000	$660	11	72
Sonoma	$1,090,277	$900,000	95.0%	$1,550,000	$635	7	62
The Sea Ranch	$1,416,667	$1,395,000	100.3%	$1,795,000	$264	3	16
Timber Cove	-	-	-	-	-	0	-
Valley Ford	-	-	-	-	-	0	-
Windsor	$868,143	$829,000	96.7%	$1,475,000	$453	21	61
Sonoma County	**$965,710**	**$820,000**	**97.3%**	**$4,300,000**	**$535**	**179**	**63**

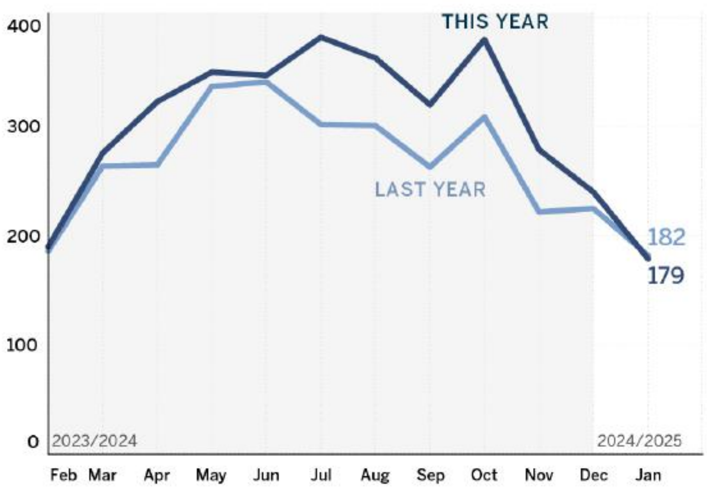
SONOMA COUNTY MARKET TRENDS

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.

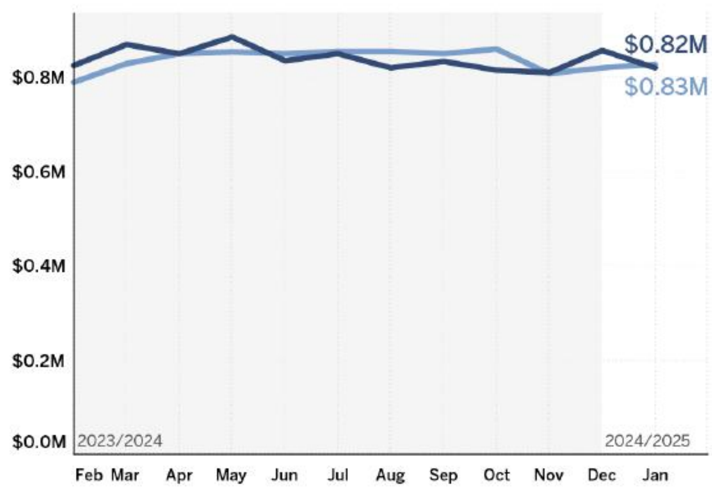
SONOMA COUNTY SINGLE FAMILY HOMES: JANUARY 2025

Distribution of Sales

Homes Sold

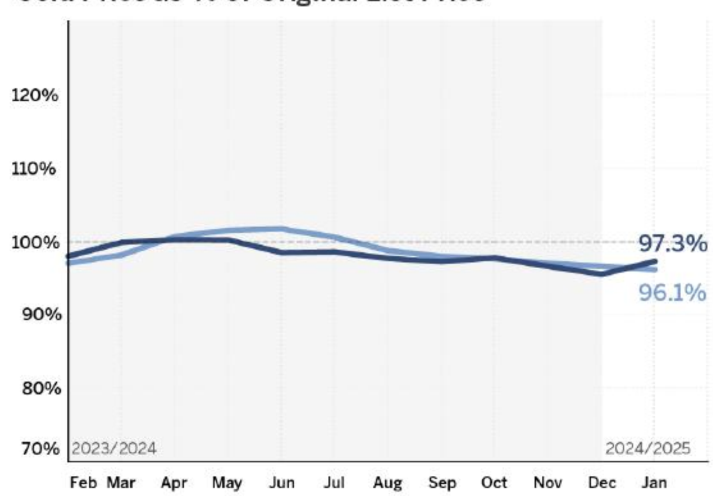


Median Price



Average Days on Market

Sold Price as % of Original List Price



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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
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Napa
707.255.0845

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