



SONOMA COUNTY MARKET UPDATE

Q1 2026





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | Q1 2026

Q1 2026 data shows Sonoma County gaining momentum, with buyer demand picking up even as inventory remains constrained and pricing holds steady.

The most compelling trend this quarter is the continued imbalance between demand and supply. The number of homes going into contract increased 4.0% and closed sales rose 2.2%, while inventory declined 5.8%. This signals that buyers are re-engaging in a meaningful way and competing for a shrinking pool of available homes.

At the same time, the market is settling into a more measured and sustainable pace. Homes are taking longer to sell, with median days on market increasing by 7 days to 40, and the percentage of homes selling over asking price declined to 30.1%. While bidding wars have cooled compared to last year, sellers are still achieving strong outcomes, receiving 99.1% of their list price on average.

Pricing continues to show notable resilience. The median sales price dipped just 0.6% to \$835,000 and price per square foot decreased by the same margin to \$502. These are modest shifts that point to stability rather than softness, especially alongside improving sales activity.

Overall, Q1 paints a clear picture of a market strengthening beneath the surface. Demand is building, supply remains limited, and pricing continues to hold firm. The market has normalized from the extremes of prior years, but the core fundamentals remain strong, creating a more balanced yet still competitive environment moving into the spring season.



SINGLE FAMILY HOMES

Q1 2026

Median Sales Price	\$835,000 ↓
Days on market	40 ↑
\$/SQ. FT.	\$502 ↓
# For Sale On Last Day Of Quarter	662 ↓
Went Into Contract	758 ↑
Properties Sold	664 ↑

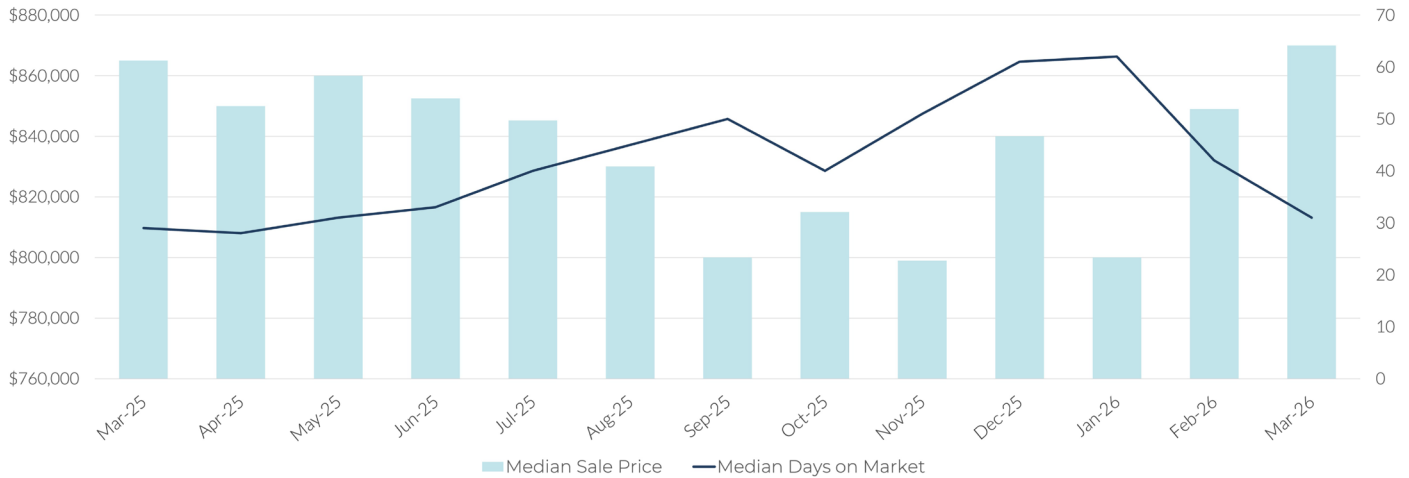


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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: +2.5%

DAYS ON MARKET: -11 days

YEAR-OVER-YEAR COMPARISON

“The number of homes going into contract increased 4.0% and closed sales rose 2.2%, while inventory declined 5.8%. This signals that buyers are re-engaging in a meaningful way and competing for a shrinking pool of available homes.”

	Q1-2026	Q1-2025	%Δ
Median Sales Price	\$835,000	\$840,000	-0.6%
Median Days On Market	40	33	+21.2%
Median \$ / SQ. FT.	\$502	\$505	-0.6%

	Q1-2026	Q1-2025	%Δ
Total Went Into Contract	758	755	+4.0%
Total Properties Sold	664	650	+2.2%
Total # For Sale Last Day of Quarter	662	703	-5.8%
Total % Of Properties Sold Over List	30.1%	35.7%	-15.7%
Total % Of List Price Received (Average)	99.1%	99.6%	-0.5%

Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2026 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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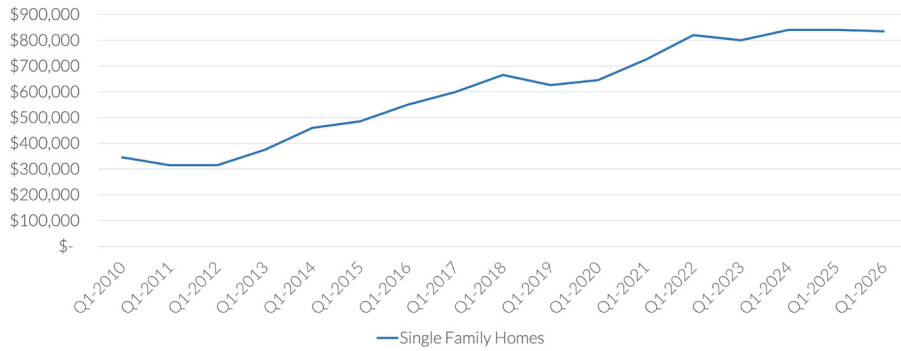
YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q1 2026	Q1 2025	%Δ	Q1 2026	Q1 2025	%Δ	Q1 2026	Q1 2025	%Δ
Bodega Bay	7*	9*	▼ 22%	275	29	▲ 848%	\$2,432,500	\$1,527,500	▲ 59%
Cazadero	7*	1*	▲ 600%	62	146	▼ 58%	\$555,000	\$200,000	▲ 178%
Cloverdale	16*	23*	▼ 30%	47	44	▲ 7%	\$656,500	\$635,000	▲ 3%
Cotati	12*	8*	▲ 50%	26	16	▲ 63%	\$923,250	\$660,000	▲ 40%
Forestville	5*	7*	▼ 29%	24	42	▼ 43%	\$1,350,000	\$603,340	▲ 124%
Geyserville	3*	4*	▼ 25%	245	69	▲ 255%	\$1,310,000	\$2,262,500	▼ 42%
Glen Ellen	8*	5*	▲ 60%	61	27	▲ 126%	\$887,500	\$1,310,000	▼ 32%
Guerneville	17*	12*	▲ 42%	109	28	▲ 289%	\$450,000	\$530,500	▼ 15%
Healdsburg	32*	33*	▼ 3%	83	37	▲ 124%	\$979,975	\$1,247,000	▼ 21%
Jenner	0	1*	▼ 100%	-	24	-	-	\$650,000	-
Kenwood	4*	2*	▲ 100%	17	141	▲ 88%	\$791,000	\$1,275,000	▼ 38%
Monte Rio	3*	3*	0%	61	141	▲ 57%	\$576,770	\$700,000	▼ 18%
Occidental	4*	2*	▲ 100%	52	75	▲ 31%	\$1,165,000	\$1,262,500	▼ 8%
Penngrrove	4*	6*	▼ 33%	122	48	▲ 154%	\$2,115,000	\$1,282,500	▲ 65%
Petaluma	75	95*	▼ 21%	25	27	▼ 7%	\$1,050,000	\$1,030,000	▲ 2%
Rohnert Park	50	54*	▼ 7%	29	35	▼ 17%	\$767,000	\$795,000	▼ 4%
Santa Rosa	273	239	▲ 14%	44	34	▲ 29%	\$750,000	\$775,000	▼ 3%
Sebastopol	36*	27*	▲ 33%	27	32	▼ 16%	\$1,200,000	\$1,100,000	▲ 9%
Sonoma	60	47*	▲ 28%	39	27	▲ 44%	\$1,000,000	\$930,000	▲ 8%
Windsor	27*	54	▼ 50%	23	35	▼ 34%	\$869,000	\$816,785	▲ 6%
SONOMA COUNTY	664	650	▲ 2%	40	33	▲ 21%	\$835,000	\$840,000	▼ 1%

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

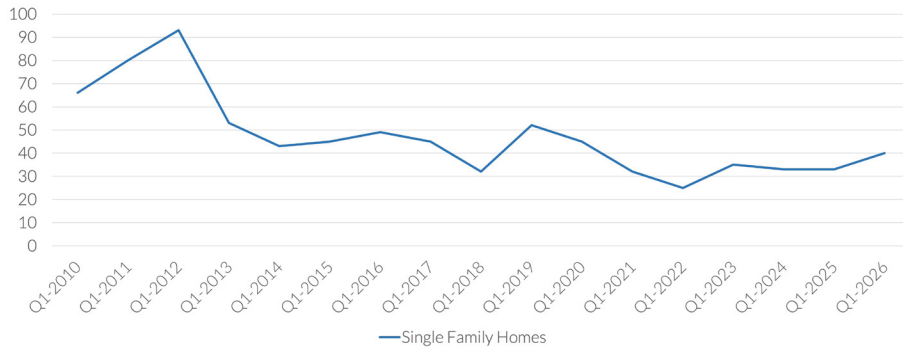


Single Family Residences

\$835,000

-0.6% change year-over-year

MEDIAN MARKET TIME

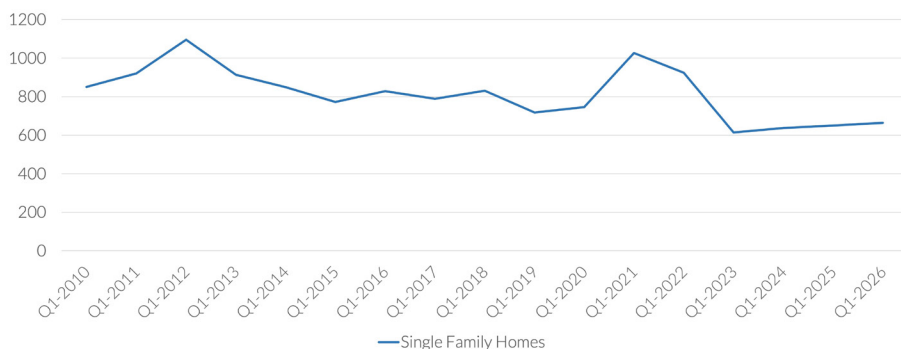


Single Family Residences

40 days

+7 day change year-over-year

NUMBER OF SALES



Single Family Residences

664

+2.2% change year-over-year