

SONOMA COUNTY MARKET UPDATE

2025 YEAR IN REVIEW





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | 2025 YEAR IN REVIEW

Sonoma County closed 2025 with improving momentum and clear signs of renewed activity. A key driver heading into year end has been the sharp drop in mortgage rates, with the average 30-year fixed rate recently falling to its lowest level in more than three years. This shift has already translated into increased purchase and refinance activity, reinforcing confidence that housing demand is strengthening and setting the stage for a solid spring selling season.

Transaction activity confirmed this trend. The number of single-family homes going into contract increased 5.8 percent in 2025, and closed sales rose 4.4 percent year over year, demonstrating steady buyer engagement as financing conditions improved. Pricing remained broadly stable. The median sales price edged down just 0.4 percent to \$836,000, while price per square foot held flat at \$508, suggesting normalization rather than meaningful softening.

Homes did take longer to sell, with median days on market increasing to 39 days, reflecting a more deliberate pace and greater buyer choice throughout much of the year. Inventory levels were higher for most of 2025, which helped moderate competition and pricing. Even so, nearly one-third of homes still sold over list price, and sellers received an average of 99.3 percent of asking, indicating continued demand for well-located, well-prepared properties.

Overall, Sonoma County exits 2025 with improving affordability, rising transaction volume, and a healthier balance between buyers and sellers. With mortgage rates now materially lower and buyer activity already responding, the market appears well positioned for a more active and constructive start to 2026, particularly as spring approaches.



SINGLE FAMILY HOMES

2025

Median Sales Price	\$836,000 ↓
Days on market	39 ↑
\$ / SQ. FT.	\$508
# For Sale On Last Day Of Year	486 ↓
Went Into Contract	3,778 ↑
Properties Sold	3,743 ↑

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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: +5.1%

DAYS ON MARKET: +10 days

YEAR-OVER-YEAR COMPARISON

"The number of single-family homes going into contract increased 5.8 percent in 2025, and closed sales rose 4.4 percent year over year, demonstrating steady buyer engagement as financing conditions improved."

	2025	2024	%Δ
Median Sales Price	\$836,000	\$839,464	-0.4%
Median Days On Market	39	32	+21.9%
Median \$ / SQ. FT.	\$508	\$508	0.0%

	2025	2024	%Δ
Total Went Into Contract	3,778	3,571	+5.8%
Total Properties Sold	3,743	3,585	+4.4%
Total # For Sale Last Day of Year	486	495	-1.8%
Total % Of Properties Sold Over List	31.7%	37.0%	-14.3%
Total % Of List Price Received (Average)	99.3%	100.2%	-0.9%

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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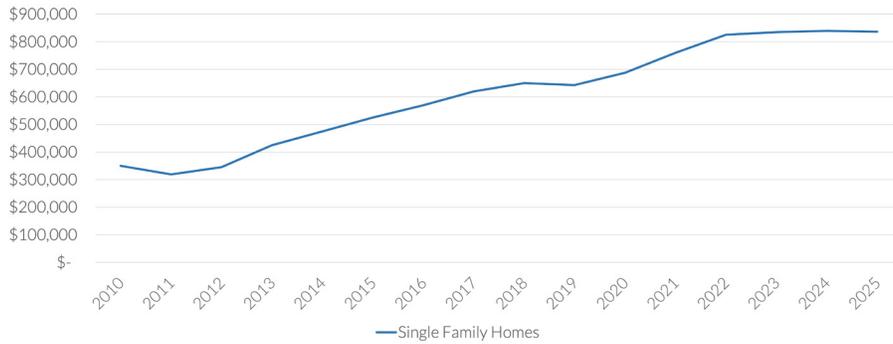
YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2025	2024	%Δ	2025	2024	%Δ	2025	2024	%Δ
Bodega Bay	43*	43*	0%	34	45	▼ 24%	\$1,405,000	\$1,350,000	▲ 4%
Cazadero	28*	20*	▲ 40%	43	36	▲ 19%	\$560,815	\$622,000	▼ 10%
Cloverdale	90	96	▼ 6%	52	43	▲ 21%	\$632,500	\$649,500	▼ 3%
Cotati	48*	45*	▲ 7%	21	31	▼ 32%	\$803,000	\$850,000	▼ 6%
Forestville	61	62	▼ 2%	61	37	▲ 65%	\$632,500	\$625,000	▲ 1%
Geyserville	12*	10*	▲ 20%	106	63	▲ 68%	\$1,520,000	\$938,500	▲ 62%
Glen Ellen	31*	40*	▼ 23%	45	64	▼ 30%	\$1,327,000	\$1,250,000	▲ 6%
Guerneville	104	85	▲ 22%	52	44	▲ 18%	\$546,000	\$579,000	▼ 6%
Healdsburg	177	149	▲ 19%	48	47	▲ 2%	\$1,175,000	\$1,225,000	▼ 4%
Jenner	10*	9*	▲ 11%	36	34	▲ 6%	\$857,500	\$870,000	▼ 1%
Kenwood	23*	18*	▲ 28%	72	38	▲ 89%	\$1,800,000	\$1,575,000	▲ 14%
Monte Rio	18*	39*	▼ 54%	44	35	▲ 26%	\$532,500	\$500,000	▲ 7%
Occidental	22*	12*	▲ 83%	47	26	▲ 81%	\$1,283,950	\$1,322,500	▼ 3%
Penngrove	38*	24*	▲ 58%	33	20	▲ 65%	\$1,345,000	\$1,306,250	▲ 3%
Petaluma	485	448	▲ 8%	28	27	▲ 4%	\$952,009	\$944,950	▲ 1%
Rohnert Park	300	278	▲ 8%	35	27	▲ 30%	\$758,000	\$772,000	▼ 2%
Santa Rosa	1,420	1,389	▲ 2%	40	32	▲ 25%	\$760,000	\$775,000	▼ 2%
Sebastopol	201	192	▲ 5%	36	30	▲ 20%	\$1,211,000	\$1,107,500	▲ 9%
Sonoma	319	301	▲ 6%	53	38	▲ 39%	\$1,100,000	\$1,050,000	▲ 5%
Windsor	226	216	▲ 5%	36	27	▲ 33%	\$825,000	\$827,638	▼ 0%
SONOMA COUNTY	3,743	3,585	▲ 4%	39	32	▲ 22%	\$836,000	\$839,464	▼ 0%

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE



Single Family Residences

\$836,000

-0.4% change year-over-year

MEDIAN MARKET TIME



Single Family Residences

39 days

+7 day change year-over-year

NUMBER OF SALES



Single Family Residences

3,743

+4.4% change year-over-year