



# SONOMA COUNTY MARKET UPDATE

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Q2 2025







## VANGUARD PROPERTIES

# MARKET UPDATE

### SONOMA COUNTY | Q2 2025

The Sonoma County housing market stayed strong this spring, with steady price growth, increased buyer activity, and a noticeable boost in inventory. Momentum from earlier in the year carried through the quarter, keeping the market competitive and setting the stage for an active second half of 2025.

The median sales price for single-family homes ticked up 0.6% year over year to \$855,000, just below the all-time high from Q2 2022 (\$860,000). Homes are still moving at a solid pace, though the median days on market increased by 4 days to 31, suggesting buyers are taking a little more time as inventory grows. Price per square foot increased 1.2% to \$525, and activity levels improved across the board: 1,107 homes went into contract (up 5.9%), and 1,052 homes closed (up 5.5%) compared to Q2 2024.

There was also a noticeable rise in supply, with 39.4% more inventory on the market at the end of the quarter. While competition has cooled slightly, 36.9% of homes still sold over asking, and sellers received 100.0% of list price on average. The Months Supply of Inventory (MSI) reached 2.8, offering buyers a bit more breathing room while still reflecting a seller-favored market in many areas.

Freddie Mac reported last week that the average 30-year fixed-rate mortgage dropped to 6.67%, marking the fifth straight weekly decline and the largest since early March. Falling rates are encouraging more sellers to list, giving buyers more choice and momentum heading into the second half of the year.

Despite seasonally slower summer months ahead, Sonoma County's housing market remains active. With buyer activity still strong, steady price growth, and mortgage rates trending downward, this could be a great window for those ready to make a move before fall activity picks up.



## SINGLE FAMILY HOMES

### Q2 2025

Median Sales Price	\$855,000 ↑
Days on market	31 ↑
\$ / SQ. FT.	\$525 ↑
# For Sale On Last Day Of Quarter	1,100 ↑
Went Into Contract	1,107 ↑
Properties Sold	1,052 ↑

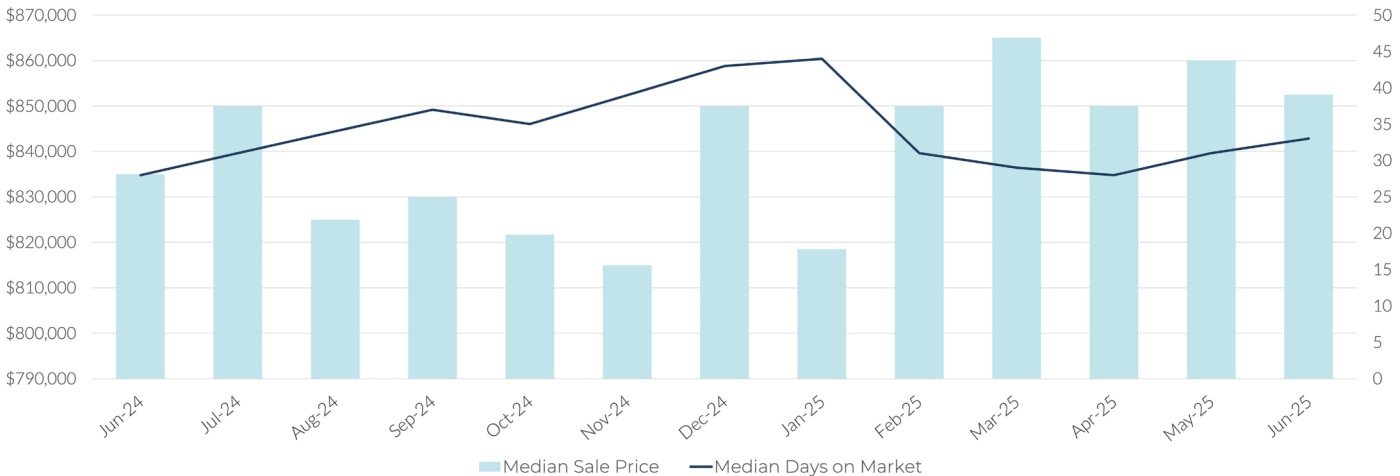


# SONOMA COUNTY MARKET UPDATE

Q2 2025

## SINGLE FAMILY RESIDENCES

### MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: -0.9%

DAYS ON MARKET: +2 days

### YEAR-OVER-YEAR COMPARISON

"The median sales price for single-family homes ticked up 0.6% year over year to \$855,000, just below the all-time high from Q2 2022 (\$860,000)."

	MEDIAN		
	Q2 2025	Q2 2024	%Δ
Sales Price	\$855,000	\$850,000	+0.6%
Days On Market	31	27	+14.8%
\$ / SQ. FT.	\$525	\$519	+1.2%

	TOTAL		
	Q2 2025	Q2 2024	%Δ
Went Into Contract	1,107	1,045	+5.9%
Properties Sold	1,052	997	+5.5%
# For Sale Last Day of Quarter	1,100	789	+39.4%
% Of Properties Sold Over List	36.9%	43.9%	-15.9%
% Of List Price Received (Average)	100.0%	101.1%	-1.1%

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. ©2025 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)		
	Q2 2025	Q2 2024	%Δ	Q2 2025	Q2 2024	%Δ	Q2 2025	Q2 2024	%Δ
Bodega Bay	13*	10*	▲ 30%	25	38	▼ 34%	\$1,325,000	\$1,298,000	▲ 2%
Cazadero	11*	4*	▲ 175%	29	29	0%	\$620,000	\$717,500	▼ 14%
Cloverdale	16*	32*	▼ 50%	32	31	▲ 3%	\$655,000	\$644,500	▲ 2%
Cotati	12*	14*	▼ 14%	38	29	▲ 31%	\$826,000	\$795,500	▲ 4%
Forestville	15*	16*	▼ 6%	43	31	▲ 39%	\$632,500	\$686,000	▼ 8%
Geyserville	3*	5*	▼ 40%	112	67	▲ 67%	\$1,500,000	\$947,000	▲ 58%
Glen Ellen	11*	11*	0%	44	42	▲ 5%	\$1,400,000	\$850,000	▲ 65%
Guerneville	30*	21*	▲ 43%	34	24	▲ 42%	\$595,000	\$570,000	▲ 4%
Healdsburg	47*	44*	▲ 7%	34	30	▲ 13%	\$1,225,000	\$1,285,000	▼ 5%
Jenner	3*	1*	▲ 200%	37	278	▼ 87%	\$985,000	\$1,075,000	▼ 8%
Kenwood	9*	7*	▲ 29%	60	42	▲ 43%	\$2,000,000	\$3,695,000	▼ 46%
Monte Rio	3*	9*	▼ 67%	12	33	▼ 64%	\$705,000	\$460,000	▲ 53%
Occidental	9*	4*	▲ 125%	35	21	▲ 67%	\$1,400,000	\$2,300,000	▼ 39%
Penngrove	5*	8*	▼ 38%	31	20	▲ 55%	\$1,650,924	\$1,248,750	▲ 32%
Petaluma	144	112	▲ 29%	25	22	▲ 14%	\$956,000	\$950,000	▲ 1%
Rohnert Park	91	70	▲ 30%	26	23	▲ 13%	\$752,000	\$768,500	▼ 2%
Santa Rosa	413	394	▲ 5%	33	28	▲ 18%	\$793,000	\$780,000	▲ 2%
Sebastopol	60	55	▲ 9%	17	19	▼ 11%	\$1,377,500	\$1,150,000	▲ 20%
Sonoma	79	87	▼ 9%	35	31	▲ 13%	\$1,200,000	\$1,050,000	▲ 14%
Windsor	63	59	▲ 7%	31	22	▲ 41%	\$840,000	\$860,650	▼ 2%
SONOMA COUNTY	1,052	997	▲ 6%	31	27	▲ 15%	\$855,000	\$850,000	▲ 1%

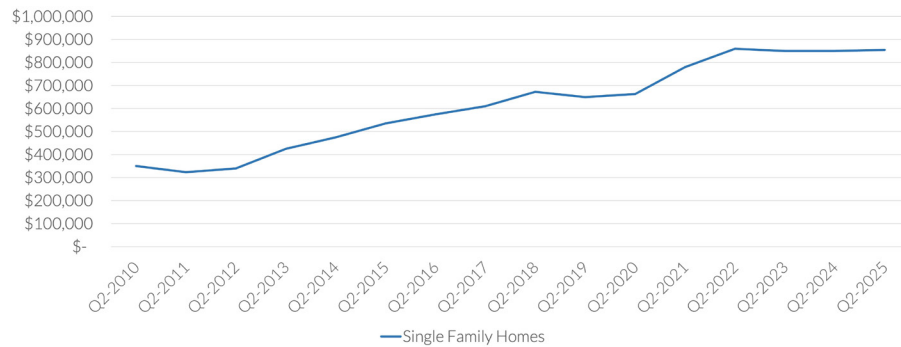
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## YEAR-OVER-YEAR COMPARISONS

### MEDIAN SALE PRICE

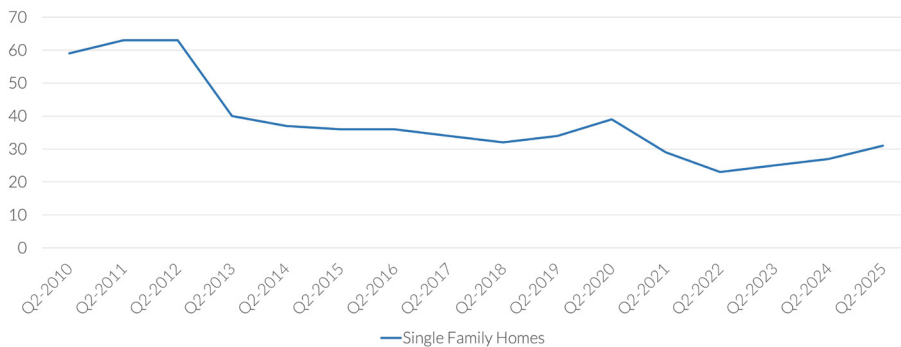


Single Family Residences

**\$855,000**

+0.6% change year-over-year

### MEDIAN MARKET TIME

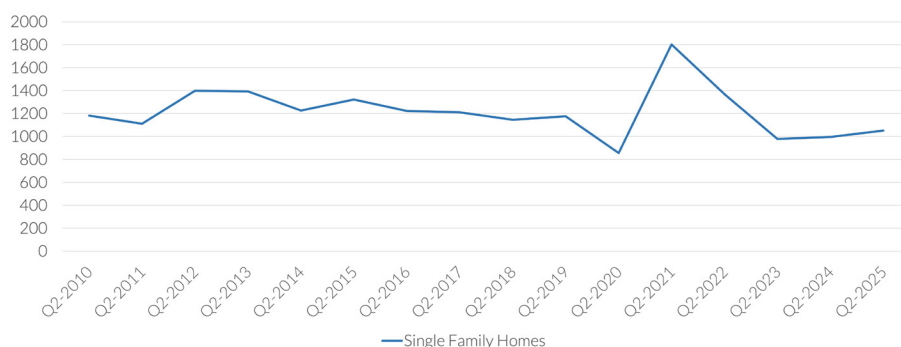


Single Family Residences

**31 days**

+4 day change year-over-year

### NUMBER OF SALES



Single Family Residences

**1,052**

+5.5% change year-over-year