



SONOMA COUNTY MARKET UPDATE

MARCH 2025





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | MARCH 2025

Buyer activity is picking up in Sonoma County, with the number of sold listings up 16.0% compared to February of last year. This signals renewed confidence and fresh opportunities for homeowners, investors, and first-time buyers alike.

While inventory remains limited, it's higher than this time last year, giving buyers more options—though competition is still strong, especially for sought-after neighborhoods and premium properties.

A key measure of market balance, Months Supply of Inventory (MSI), is becoming more balanced. A seller's market typically occurs when MSI is below three months, and Sonoma County currently sits at 2.9 months of inventory for single-family homes. This means sellers still hold the advantage, though buyers are seeing more options than before.

Falling mortgage rates are also giving buyers a boost. Freddie Mac reported that the 30-year fixed-rate mortgage saw its largest weekly drop since September, which could motivate more buyers to enter the market. Lower rates are also driving refinancing activity, with refinance applications now making up nearly 44% of market activity—the highest level since December.

With increased inventory and strong demand, this spring is shaping up to be an active season for real estate in Sonoma County.



SINGLE FAMILY HOMES

FEBRUARY 2025

Median Sales Price	\$850,000 ↑
Days on market	31 ↓
\$ / SQ. FT.	\$498 ↓
# For Sale On Last Day Of Month	625 ↑
Went Into Contract	226 ↓
Properties Sold	217 ↑

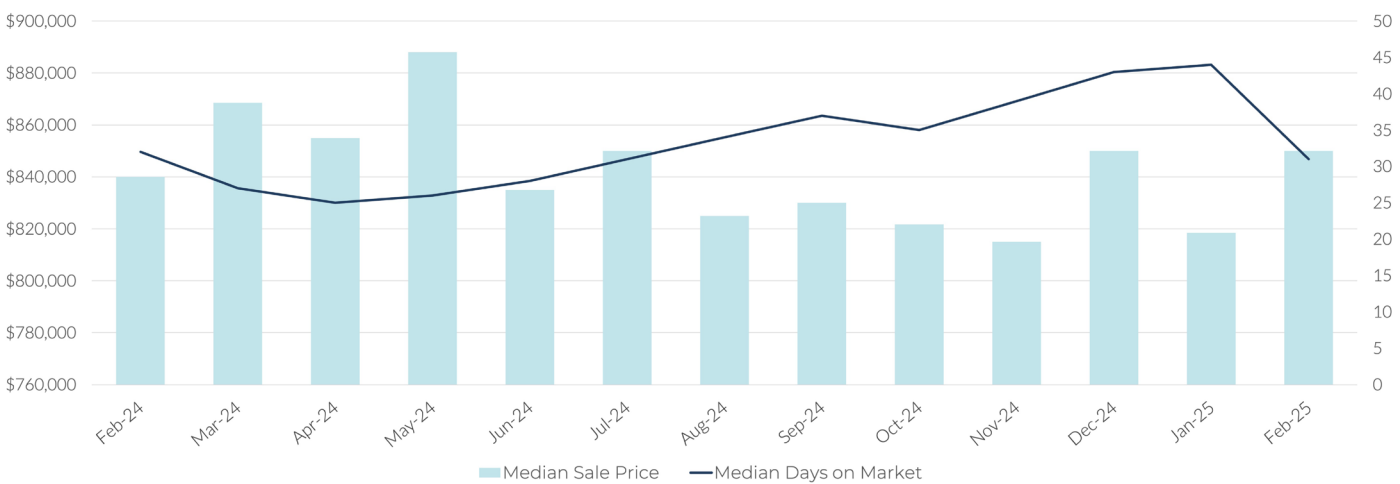


SONOMA COUNTY MARKET UPDATE

MARCH 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: +3.8%

DAYS ON MARKET: -13 day

YEAR-OVER-YEAR COMPARISON

“While inventory remains limited, it’s higher than this time last year, giving buyers more options—though competition is still strong, especially for sought-after neighborhoods and premium properties.”

MEDIAN

	FEB-2025	FEB-2024	%Δ
Sales Price	\$850,000	\$840,000	+1.2%
Days On Market	31	32	-3.1%
\$ / SQ. FT.	\$498	\$509	-2.2%

TOTAL

	FEB-2025	FEB-2024	%Δ
Went Into Contract	226	233	-3.0%
Properties Sold	217	187	+16.0%
# For Sale Last Day of Month	625	384	+62.8%
% Of Properties Sold Over List	35.5%	33.7%	+5.3%
% Of List Price Received (Average)	99.6%	99.5%	+0.1%

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YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	2024	2023	%Δ	2024	2023	%Δ	2024	2023	%Δ
Bodega Bay	43*	31*	▲ 39%	45	38	▲ 18%	\$1,350,000	\$1,457,000	▼ 7%
Cazadero	20*	21*	▼ 5%	36	44	▼ 18%	\$622,000	\$610,000	▲ 2%
Cloverdale	96	89	▲ 8%	43	40	▲ 8%	\$649,500	\$669,000	▼ 3%
Cotati	45*	44*	▲ 2%	31	26	▲ 19%	\$850,000	\$721,000	▲ 18%
Forestville	62	41*	▲ 51%	37	35	▲ 6%	\$625,000	\$741,000	▼ 16%
Geyserville	10*	8*	▲ 25%	63	53	▲ 19%	\$938,500	\$2,550,000	▼ 63%
Glen Ellen	40*	23*	▲ 74%	64	45	▲ 42%	\$1,250,000	\$1,425,000	▼ 12%
Guerneville	85	95	▼ 11%	44	31	▲ 42%	\$579,000	\$535,000	▲ 8%
Healdsburg	149	151	▼ 1%	47	39	▲ 21%	\$1,225,000	\$1,325,000	▼ 8%
Jenner	9*	7*	▲ 29%	34	33	▲ 3%	\$870,000	\$890,000	▼ 2%
Kenwood	18*	17*	▲ 6%	38	84	▼ 55%	\$1,575,000	\$1,895,000	▼ 17%
Monte Rio	39*	22*	▲ 77%	35	32	▲ 9%	\$500,000	\$528,500	▼ 5%
Occidental	12*	15*	▼ 20%	26	32	▼ 19%	\$1,322,500	\$960,000	▲ 38%
Penngrove	24*	22*	▲ 9%	20	31	▼ 35%	\$1,306,250	\$1,200,000	▲ 9%
Petaluma	448	399	▲ 12%	27	27	0%	\$944,950	\$950,000	▼ 1%
Rohnert Park	278	227	▲ 22%	27	28	▼ 4%	\$772,000	\$751,000	▲ 3%
Santa Rosa	1389	1303	▲ 7%	32	29	▲ 10%	\$775,000	\$770,000	▲ 1%
Sebastopol	192	161	▲ 19%	30	24	▲ 25%	\$1,107,500	\$1,170,000	▼ 5%
Sonoma	301	272	▲ 11%	38	30	▲ 27%	\$1,050,000	\$1,002,500	▲ 5%
Windsor	216	217	▼ 0%	27	26	▲ 4%	\$827,638	\$820,000	▲ 1%
SONOMA COUNTY	3,585	3,259	▲ 10%	32	29	▲ 10%	\$839,464	\$835,000	▲ 1%

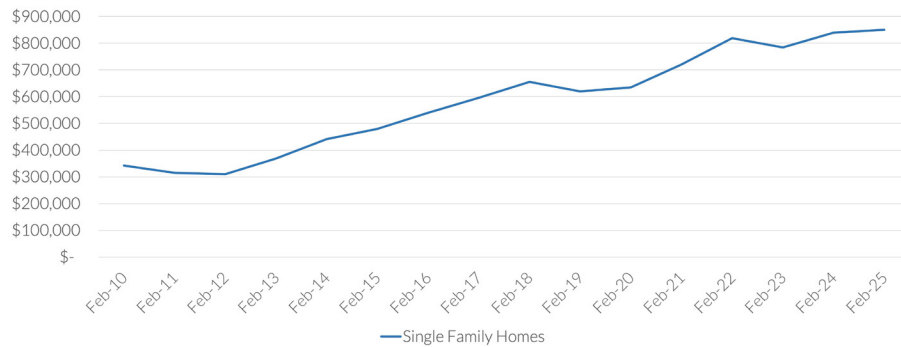
Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties. All rights reserved. Equal Housing Opportunity. DRE No. 01486075

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

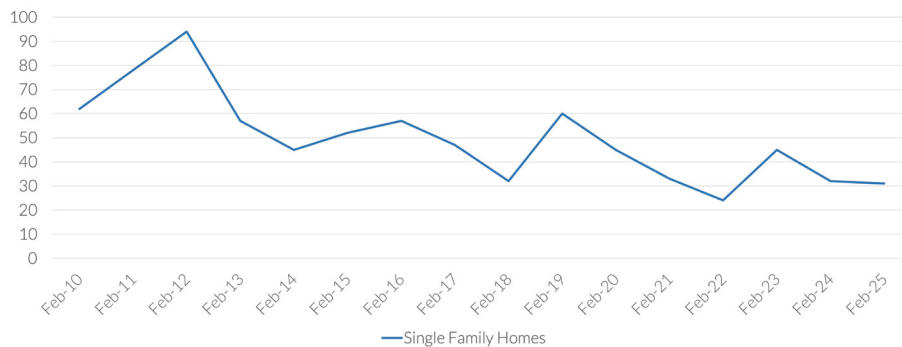


Single Family Residences

\$850,000

+1.2% change year-over-year

MEDIAN MARKET TIME

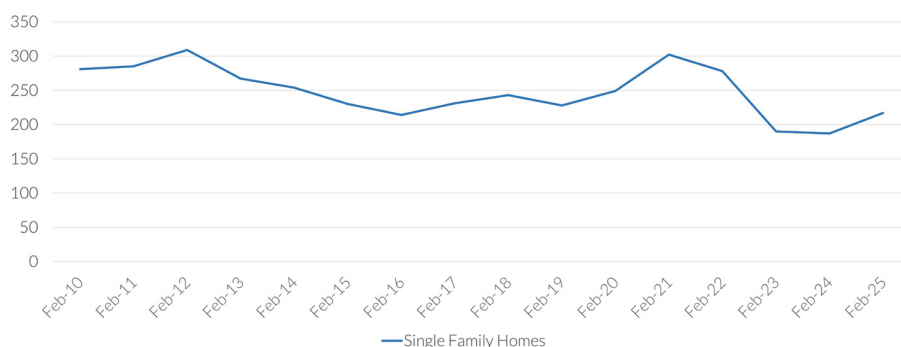


Single Family Residences

31 days

-1 day change year-over-year

NUMBER OF SALES



Single Family Residences

217

+16.0% change year-over-year