



SONOMA COUNTY MARKET UPDATE

NOVEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | NOVEMBER 2025

The fall market continued to show healthy activity through October, with increases in buyer engagement and a meaningful rise in available inventory. New contracts saw a 3.3 percent increase year over year, and the number of homes for sale climbed 19.3 percent to 939, giving buyers more options. Closed sales also edged up 0.5 percent to 368, demonstrating that demand remains steady even with more deliberate buyer pacing.

Pricing held firm overall. The median sales price ticked down just 0.8 percent to \$815,000, and the median price per square foot eased 1.8 percent to \$495. Homes spent 40 days on the market, five days longer than last year, a reflection of higher inventory and more thoughtful decision-making rather than a decline in interest. Sellers still performed well, receiving 99.1 percent of list price on average, while 30.2 percent of homes sold over asking.

With months' supply of inventory at 2.6, the market continues to move in the direction of balance while still favoring well-priced listings. More choices for buyers paired with steady demand are creating a healthier, more sustainable environment as the year winds down.

Overall, the single-family market feels stable, active, and positioned for a solid close to 2025, supported by resilient demand and improved inventory conditions.



SINGLE FAMILY HOMES

OCTOBER 2025

Median Sales Price	\$815,000 ↓
Days on market	40 ↑
\$ / SQ. FT.	\$495 ↓
# For Sale On Last Day Of Month	939 ↑
Went Into Contract	341 ↑
Properties Sold	368 ↑



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SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: +1.9%

DAYS ON MARKET: -10 days

YEAR-OVER-YEAR COMPARISON

“The fall market continued to show healthy activity through October, with increases in buyer engagement and a meaningful rise in available inventory.”

	MEDIAN		
	OCT-2025	OCT-2024	%Δ
Sales Price	\$815,000	\$821,690	-0.8%
Days On Market	40	35	+14.3%
\$ / SQ. FT.	\$495	\$504	-1.8%

	TOTAL		
	OCT-2025	OCT-2024	%Δ
Went Into Contract	341	330	+3.3%
Properties Sold	368	366	+0.5%
# For Sale Last Day of Month	939	787	+19.3%
% Of Properties Sold Over List	30.2%	33.3%	-9.3%
% Of List Price Received (Average)	99.1%	100.8%	-1.7%

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)		
	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ	Q3 2025	Q3 2024	%Δ
Bodega Bay	10*	11*	▼ 9%	74	43	▲ 72%	\$1,219,500	\$1,749,000	▼ 30%
Cazadero	9*	8*	▲ 13%	53	37	▲ 43%	\$478,000	\$607,500	▼ 21%
Cloverdale	27*	30*	▼ 10%	84	47	▲ 79%	\$595,000	\$620,500	▼ 4%
Cotati	16*	12*	▲ 33%	21	47	▼ 55%	\$766,500	\$850,000	▼ 10%
Forestville	26*	27*	▼ 4%	62	32	▲ 94%	\$722,500	\$555,555	▲ 30%
Geyserville	4*	2*	▲ 100%	121	248	▼ 51%	\$1,065,000	\$947,500	▲ 12%
Glen Ellen	6*	13*	▼ 54%	45	76	▼ 41%	\$1,197,500	\$1,299,000	▼ 8%
Guerneville	41*	33*	▲ 24%	57	50	▲ 14%	\$515,000	\$635,000	▼ 19%
Healdsburg	60	33*	▲ 82%	54	53	▲ 2%	\$1,005,000	\$1,240,000	▼ 19%
Jenner	3*	2*	▲ 50%	35	17	▲ 106%	\$910,000	\$1,235,000	▼ 26%
Kenwood	7*	3*	▲ 133%	64	28	▲ 129%	\$1,388,000	\$1,500,000	▼ 7%
Monte Rio	5*	20*	▼ 75%	88	41	▲ 115%	\$585,000	\$578,500	▲ 1%
Occidental	6*	2*	▲ 200%	28	34	▼ 18%	\$1,117,500	\$1,327,300	▼ 16%
Penngrove	17*	6*	▲ 183%	25	34	▼ 26%	\$1,351,000	\$1,261,500	▲ 7%
Petaluma	131	133	▼ 2%	31	27	▲ 15%	\$965,000	\$940,000	▲ 3%
Rohnert Park	83	85	▼ 2%	37	27	▲ 37%	\$749,000	\$767,500	▼ 2%
Santa Rosa	405	404	▲ 0%	46	32	▲ 44%	\$755,000	\$785,000	▼ 4%
Sebastopol	59	58	▲ 2%	35	31	▲ 13%	\$1,190,000	\$1,248,000	▼ 5%
Sonoma	97	83	▲ 17%	58	43	▲ 35%	\$1,130,000	\$1,125,000	▲ 0%
Windsor	64	55	▲ 16%	35	28	▲ 25%	\$817,500	\$815,130	▲ 0%
SONOMA COUNTY	1,096	896	▲ 22%	45	34	▲ 32%	\$828,280	\$839,232	▼ 1%

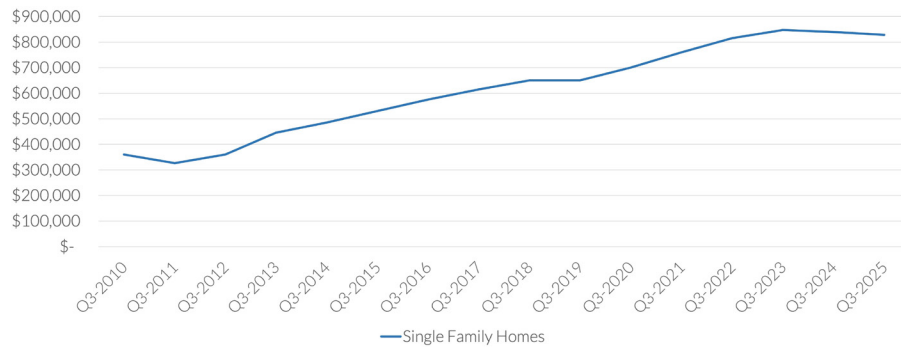
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

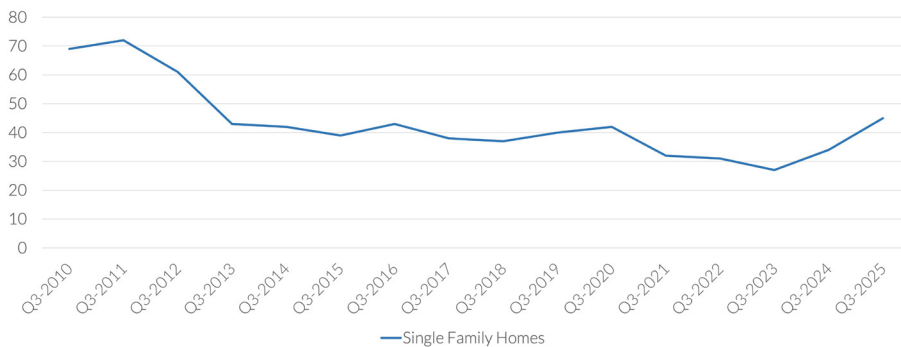


Single Family Residences

\$828,280

-1.3% change year-over-year

MEDIAN MARKET TIME

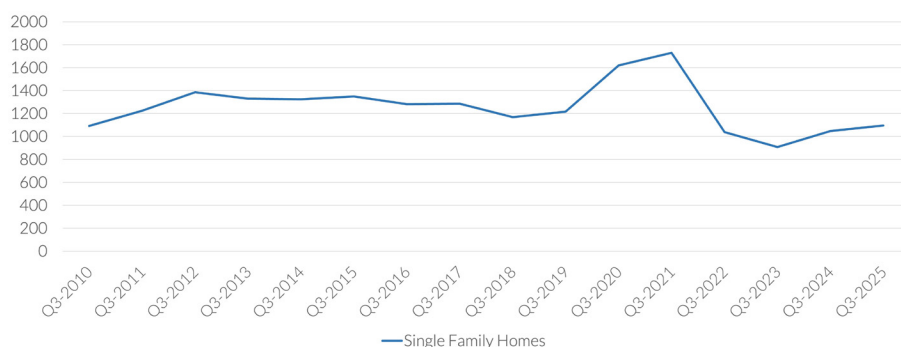


Single Family Residences

45 days

+11 day change year-over-year

NUMBER OF SALES



Single Family Residences

1,096

+4.6% change year-over-year