

SONOMA COUNTY MARKET UPDATE

Q1 2025





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | Q1 2025

Sonoma County's real estate market showed strong momentum in the first quarter of 2025, with buyer activity on the rise and sales outpacing last year. The number of single-family homes going into contract increased 10% year-over-year, signaling renewed confidence and engagement from buyers.

Inventory levels are up, offering buyers more choices. Active inventory for single-family homes is up 56% compared to Q1 2024, and the Months' Supply of Inventory (MSI) now stands at 2.9; still considered a seller's market, but with more balance.

On the financing side, mortgage rates dropped sharply following the announcement of new tariffs, giving buyers additional incentive to act; though volatility remains in play.

With strong demand and growing inventory, Sonoma County is well-positioned for an active and competitive spring season.



SINGLE FAMILY HOMES

Q1 2025

Median Sales Price	\$840,000
Days on market	33
\$ / SQ. FT.	\$505 ↓
# For Sale On Last Day Of Quarter	703 ↑
Went Into Contract	755 ↑
Properties Sold	650 ↑

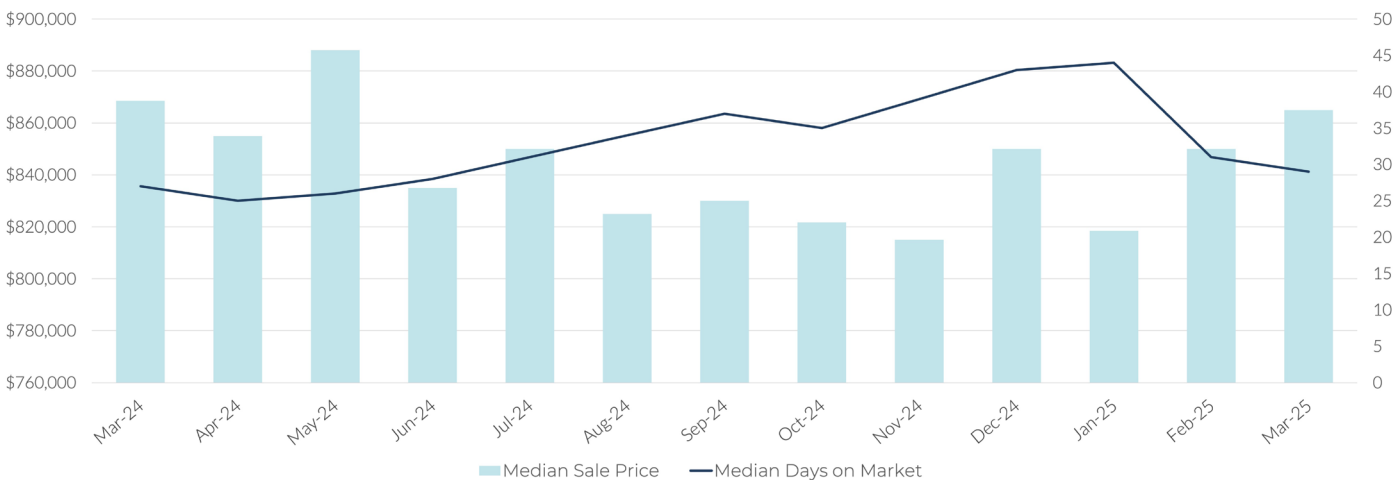


SONOMA COUNTY MARKET UPDATE

Q1 2025

SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: +1.8%

DAYS ON MARKET: -2 days

YEAR-OVER-YEAR COMPARISON

"Inventory levels are up, offering buyers more choices. Active inventory for single-family homes is up 56% compared to Q1 2024, and the Months' Supply of Inventory (MSI) now stands at 2.9; still considered a seller's market, but with more balance."

MEDIAN

	Q1-2025	Q1-2024	%Δ
Sales Price	\$840,000	\$840,000	0.0%
Days On Market	33	33	0.0%
\$ / SQ. FT.	\$505	\$506	-0.2%

TOTAL

	Q1-2025	Q1-2024	%Δ
Went Into Contract	755	682	+10.7%
Properties Sold	650	635	+2.4%
# For Sale Last Day of Quarter	703	449	+56.6%
% Of Properties Sold Over List	35.7%	36.4%	-1.9%
% Of List Price Received (Average)	99.6%	100.0%	-0.4%

SONOMA COUNTY MARKET UPDATE

Q1 2025

YEAR-OVER-YEAR REGION COMPARISON

REGION	HOMES SOLD (TOTAL)			DAYS ON MARKET (MEDIAN)			SALE PRICE (MEDIAN)		
	Q1 2025	Q1 2024	%Δ	Q1 2025	Q1 2024	%Δ	Q1 2025	Q1 2024	%Δ
Bodega Bay	9*	7*	▲ 29%	29	23	▲ 26%	\$1,527,500	\$1,130,000	▲ 35%
Cazadero	1*	5*	▼ 80%	146	161	▼ 9%	\$200,000	\$515,000	▼ 61%
Cloverdale	23*	18*	▲ 28%	44	48	▼ 8%	\$635,000	\$682,000	▼ 7%
Cotati	8*	8*	0%	16	29	▼ 45%	\$660,000	\$1,025,000	▼ 36%
Forestville	7*	7*	0%	42	33	▲ 27%	\$603,340	\$830,000	▼ 27%
Geyserville	4*	1*	▲ 300%	69	18	▲ 283%	\$2,262,500	\$575,000	▲ 293%
Glen Ellen	5*	8*	▼ 38%	27	151	▼ 82%	\$1,310,000	\$1,217,500	▲ 8%
Guerneville	12*	12*	0%	28	101	▼ 72%	\$530,500	\$539,500	▼ 2%
Healdsburg	33*	31*	▲ 6%	37	43	▼ 14%	\$1,247,000	\$960,000	▲ 30%
Jenner	1*	2*	▼ 50%	24	15	▲ 60%	\$650,000	\$665,000	▼ 2%
Kenwood	2*	3*	▼ 33%	141	34	▲ 315%	\$1,275,000	\$1,800,000	▼ 29%
Monte Rio	3*	6*	▼ 50%	141	17	▲ 729%	\$700,000	\$634,750	▲ 10%
Occidental	2*	1*	▲ 100%	75	12	▲ 525%	\$1,262,500	\$744,000	▲ 70%
Penngrove	6*	6*	0%	48	13	▲ 269%	\$1,282,500	\$1,320,000	▼ 3%
Petaluma	95	82	▲ 16%	27	26	▲ 4%	\$1,030,000	\$924,944	▲ 11%
Rohnert Park	54	45*	▲ 20%	35	24	▲ 46%	\$795,000	\$750,000	▲ 6%
Santa Rosa	239	241	▼ 1%	34	39	▼ 13%	\$775,000	\$775,000	0%
Sebastopol	27*	32*	▼ 16%	32	27	▲ 19%	\$1,100,000	\$940,000	▲ 17%
Sonoma	47*	62	▼ 24%	27	37	▼ 27%	\$930,000	\$949,500	▼ 2%
Windsor	54	38*	▲ 42%	35	29	▲ 21%	\$816,785	\$845,000	▼ 3%
SONOMA COUNTY	650	635	▲ 2%	33	33	0%	\$840,000	\$840,000	0%

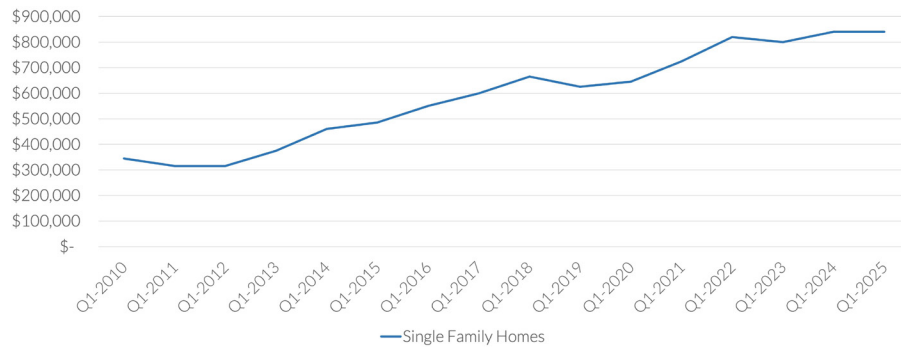
Sources: SFAR Super Regional MLS & BrokerMetrics. Property types covered: Single-family. Only property data posted on the MLS is covered. All information is deemed reliable, but not guaranteed for accuracy. All data is subject to errors, omissions, revisions, and is not warranted. ©2025 Vanguard Properties.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

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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

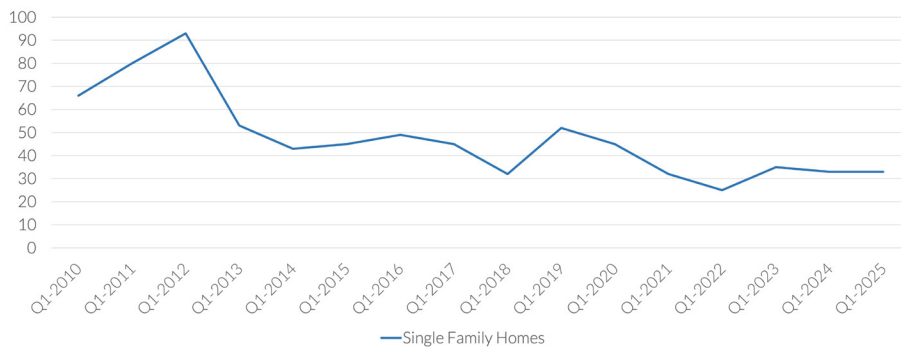


Single Family Residences

\$840,000

No change year-over-year

MEDIAN MARKET TIME

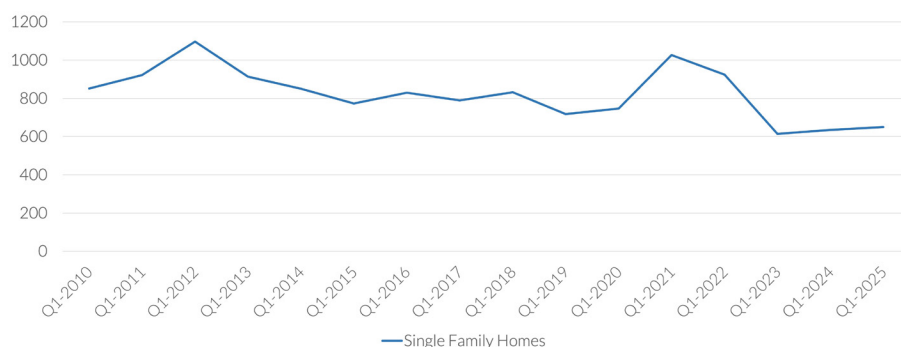


Single Family Residences

33 days

No change year-over-year

NUMBER OF SALES



Single Family Residences

650

+2.4% change year-over-year