



SONOMA COUNTY MARKET UPDATE

SEPTEMBER 2025





VANGUARD PROPERTIES

MARKET UPDATE

SONOMA COUNTY | SEPTEMBER 2025

As summer wrapped up without major shifts beyond the usual seasonal ebb and flow, the focus now turns to the fall selling season. This stretch typically runs from early September through mid-November before activity tapers for the midwinter holidays, and the early read is positive.

In August, the median sales price edged up 0.6 percent year over year to \$830,000. Median days on market rose by 11 days to 45 and price per square foot eased 1.4 percent to 507. Demand held firm with new escrows up 4.8 percent to 373 and closed sales up 3.9 percent. Supply expanded, with end-of-month inventory up 23.5 percent to 1,004, and months supply registered 2.7. Sellers received 98.9 percent of list price on average, a modest 0.8 percent dip from last year, while 27.9 percent of homes still sold over asking, showing that well priced and well presented properties continue to draw strong attention.

More inventory is giving buyers choice, which naturally lengthens market time, yet the increased contract activity signals healthy engagement as fall begins.

Perhaps the most encouraging development is on the financing side. Freddie Mac reported the 30-year fixed-rate mortgage fell 15 basis points from last week, the largest weekly drop in the past year. This decline is creating new opportunities for buyers to re-enter the market or expand their purchasing power. The shift is already fueling stronger demand, helping to offset the slower pace that characterized the summer months and building momentum for the months ahead.



SINGLE FAMILY HOMES

AUGUST 2025

Median Sales Price	\$830,000 ↑
Days on market	45 ↑
\$ / SQ. FT.	\$507 ↓
# For Sale On Last Day Of Month	1,004 ↑
Went Into Contract	373 ↑
Properties Sold	373 ↑



SINGLE FAMILY RESIDENCES

MONTH-OVER-MONTH COMPARISON



CHANGE IN PAST MONTH:

SALES PRICE: -1.8%

DAYS ON MARKET: +5 days

YEAR-OVER-YEAR COMPARISON

“More inventory is giving buyers choice, which naturally lengthens market time, yet increased contract activity signals healthy engagement as fall begins.”

	MEDIAN		
	AUG-2025	AUG-2024	%Δ
Sales Price	\$830,000	\$825,000	+0.6%
Days On Market	45	34	+32.4%
\$ / SQ. FT.	\$507	\$514	-1.4%

	TOTAL		
	AUG-2025	AUG-2024	%Δ
Went Into Contract	373	356	+4.8%
Properties Sold	373	359	+3.9%
# For Sale Last Day of Month	1,004	813	+23.5%
% Of Properties Sold Over List	27.9%	33.4%	-16.5%
% Of List Price Received (Average)	98.9%	99.7%	-0.8%

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%

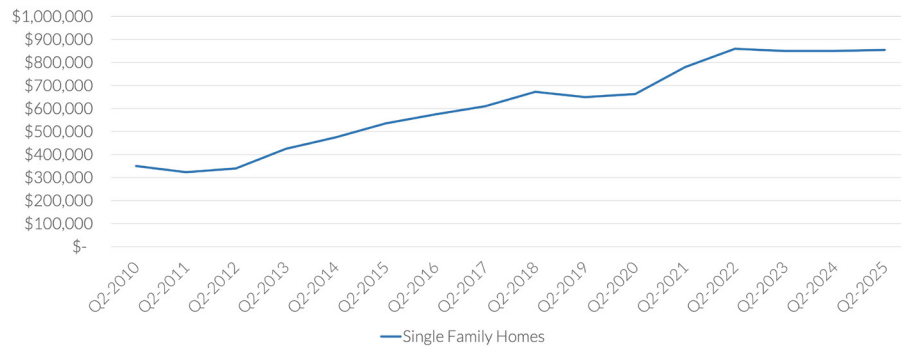
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YEAR-OVER-YEAR COMPARISONS

MEDIAN SALE PRICE

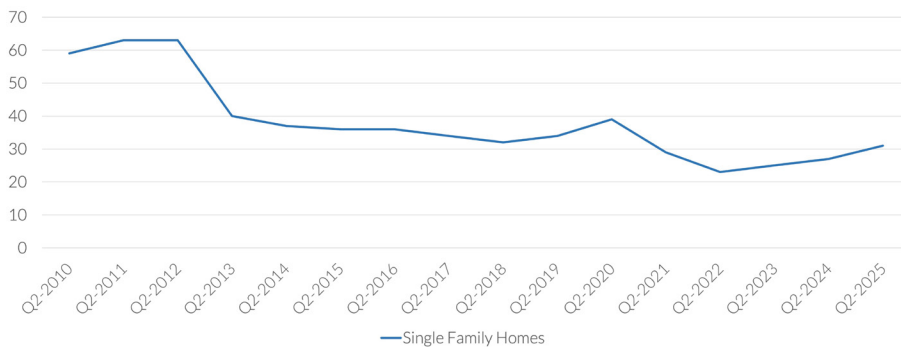


Single Family Residences

\$855,000

+0.6% change year-over-year

MEDIAN MARKET TIME

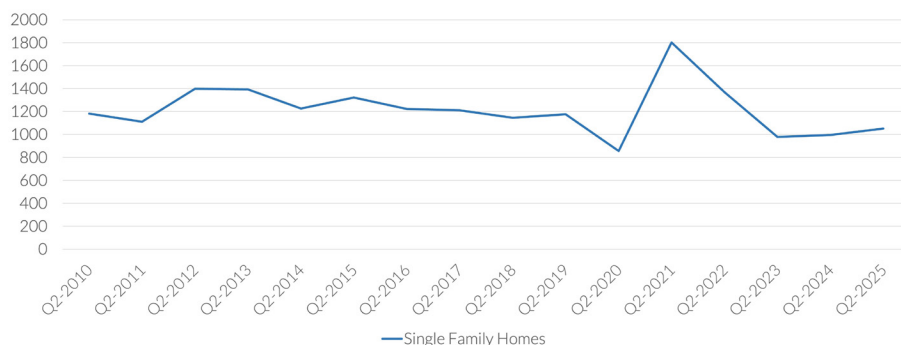


Single Family Residences

31 days

+4 day change year-over-year

NUMBER OF SALES



Single Family Residences

1,052

+5.5% change year-over-year