

APRIL MARKET REPORT

SAN FRANCISCO BAY AREA
2023



Golden Gate

Sotheby's
INTERNATIONAL REALTY



Our cover home: 7785 Laguna Heights Court, Sunol
\$6,888,000

The San Francisco Bay Area Housing Market

Welcome to our April Market Report for the San Francisco Bay Area, presented in partnership with the Rosen Consulting Group (RCG). For our statistical report of the regional housing market, we take a close look at the ten counties associated with the SF Bay Area. This report focuses primarily on detached single family homes, with added coverage of the significant condominium market in San Francisco. We also examine the regional luxury market. All data is sourced from local Multiple Listing Service (MLS) organizations.

SIGNS OF GROWTH

As spring emerged and the weather warmed, green shoots emerged in segments of the SF Bay Area housing market. The stabilization of mortgage rates during the past few months have led to increased buyer activity and provided a boost to home prices in many neighborhoods. The SF Bay Area economy continued to perform well despite new negative factors hitting the region in the last two months. The recent bank failures will curtail venture capital and other key segments of the economy while layoffs will impact workers across a range of industries. Yet, the regional

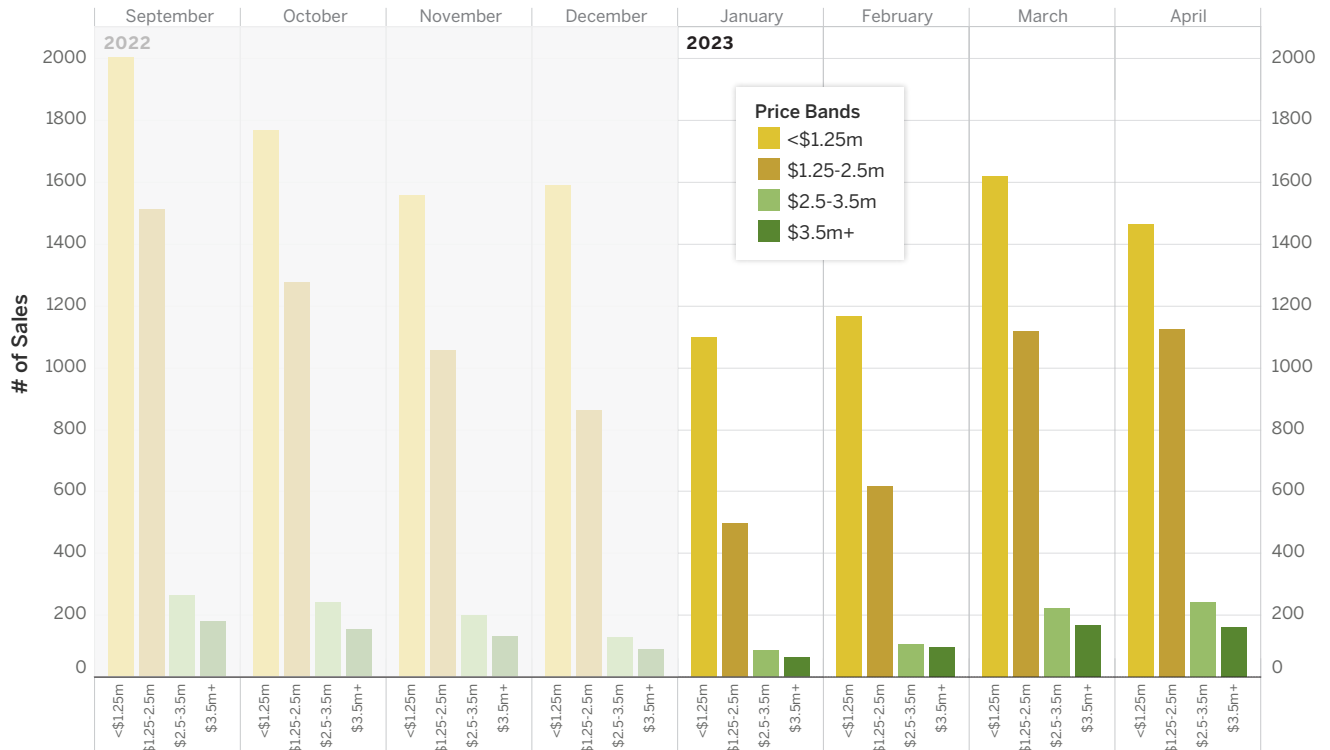
unemployment rate is near the 3% mark and the labor shortage continues. While the regional economy faces challenges, the underlying strength of major employers may keep hiring trends in the positive for the remainder of the year.

STABILIZING RATES MITIGATE SLOWER MARKET

Sales volume slowed slightly in April as stress in the financial sector rippled through potential buyers. However, the modest decrease in mortgage rates from the peak earlier in the year helped to pull some buyers off of the sidelines,

Sales Activity Varies by Price Point

OF SINGLE FAMILY HOMES SOLD BY PRICE POINT · SEP 2022-APR 2023



Includes sales of Single Family Homes in 10 Bay Area counties. Data Source: MLS

mitigating a deeper slowdown. Roughly 3,000 homes sold across the SF Bay Area compared with 3,100 the previous month. Sales decreased in most counties, though to a lesser degree in the inner SF Bay Area, with a few notable exceptions. In Marin County, closed sales increased by 29% in April, further signs of a stronger rebound in the county that slowed the most in January and February. Transaction volume also increased in San Francisco, where sales increased by 16% compared with March.

UPPER PRICE RANGE OUTPERFORMS

Buyer activity in the upper price tiers continued to hold up better than entry-level homes. For homes priced less than \$1 million, April sales volume decreased by nearly 10%. However, April produced the third-consecutive monthly increase

and the most sales greater than \$2.5 million since September. Among homes priced greater than \$2.5 million, sales increased by 4%. Sales in this price range increased by more than 80% in Contra Costa County and 40% in San Francisco.

MEDIAN VALUES INCREASE WITH MORE BUYER COMPETITION

The median sales price of a single family home increased in April to \$1.265 million, a bump of more than 5% compared with March. Since the end of 2022, the median price has risen close to 19% SF Bay Area-wide.

The increase in pricing and sales activity underscores that buyer competition is on the rise. The number of sellers receiving multiple offers increased in many neighborhoods across the region. In April, more than 56% of homes were

sold at greater than the list price. This was the highest share since mid-2022. While the number of homes sold at a premium did not increase in every county, the strongest gains were in the North Bay and Contra Costa County.

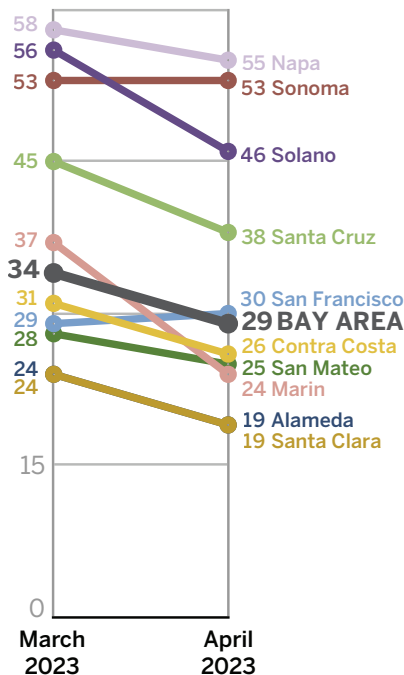
PACE OF SALES PICKS UP

Similarly, homes are selling more quickly. The average home sold in April spent 29 days on the market, a decrease of 14% from March and the first time the average fell below the 30 day threshold in 2023. The pace quickened in mid-priced homes, with homes priced between \$1.25 million and \$2.5 million averaging just 21 days on the market. Stronger demand for homes priced between \$2.5 million and \$3.5 million also led to quicker sales, with the average home spending 24 days on the market. Homes sold the fastest in Alameda and Santa Clara counties, both with an average of approximately 19 days. Coinciding with the rapid rise in sales in Marin County, the average time on market dropped the most in April.

Homes Moving Faster

AVERAGE DOM FOR SINGLE FAMILY HOMES
MAR 2023 VS. APR 2023

Average Days on Market



Data Source: MLS

INCREASING INVENTORY

With home values on the rise in many neighborhoods and potential buyers adjusting to higher mortgage rates, more homes were listed for sale. In April, the number of homes for sale increased to 4,200, the fourth-consecutive monthly increase.

Despite this increase in available homes, supply remains much lower than mid-2022 and the constrained supply continues to limit sales activity. A wider range of available homes would help boost sales volume. The increase in homes for sale in Marin County during the past few months was a factor in the surge in closed sales by April.

LOOKING AHEAD

The spring buying season has generated some early signs of improvement in the SF Bay Area. Buyers are adjusting to higher mortgage rates and the drop in home prices in the last year have helped improve affordability. In fact, the drop in pricing means that the monthly mortgage payment at current rates for a median-priced home is less than the payment for the median-priced home one year ago. The greater affordability will help sales in lower pricing tiers as well as spur additional trade-up purchases at the higher end. Overall, the growing buyer demand will also prompt additional competition, leading to more homes likely selling above the list price. Sales volume may fluctuate throughout the year, but overall buyer demand should improve.

SALES BY COUNTY · SINGLE FAMILY HOMES

County	Median Price			Avg. Price per Sq. Foot			Number of Sales		
	Apr 2022	Apr 2023	Change	Apr 2022	Apr 2023	Change	Apr 2022	Apr 2023	Change
Alameda	\$1,495,000	\$1,225,000	-18.1%	\$891	\$733	-17.7%	939	562	-40.1%
Contra Costa	\$1,000,000	\$900,000	-10.0%	\$642	\$560	-12.7%	984	591	-39.9%
Marin	\$2,200,000	\$1,817,500	-17.4%	\$1,108	\$964	-13.0%	231	152	-34.2%
Napa	\$975,000	\$825,000	-15.4%	\$678	\$609	-10.0%	131	61	-53.4%
San Francisco	\$2,050,000	\$1,600,000	-22.0%	\$1,078	\$976	-9.4%	252	171	-32.1%
San Mateo	\$2,250,000	\$1,800,000	-20.0%	\$1,321	\$1,163	-12.0%	445	230	-48.3%
Santa Clara	\$1,950,000	\$1,771,500	-9.2%	\$1,200	\$1,100	-8.3%	1050	584	-44.4%
Santa Cruz	\$1,410,000	\$1,349,500	-4.3%	\$940	\$799	-15.0%	179	76	-57.5%
Solano	\$638,000	\$574,960	-9.9%	\$388	\$352	-9.1%	435	297	-31.7%
Sonoma	\$865,000	\$850,000	-1.7%	\$589	\$582	-1.2%	455	265	-41.8%
SF Bay Area	\$1,480,000	\$1,265,000	-14.5%	\$889	\$777	-12.6%	5101	2989	-41.4%

PRICING TRENDS

Home values continued to recover from the dip at the beginning of the year. The median price of a sold home increased to \$1.265 million in April, an increase of more than 5%. Since the end of 2022, the median price has recovered by approximately 19%. The strongest price increases in April occurred in Santa Cruz County at 13%, Marin County at 10% and Contra Costa County with a 9% gain.

About Golden Gate Sotheby’s International Realty

Golden Gate Sotheby’s International Realty has over 465 agents in 21 offices throughout the San Francisco Bay Area serving the counties of Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma, and San Francisco.

About Rosen Consulting Group

Rosen Consulting Group was founded in 1990 by Dr. Kenneth T. Rosen to provide objective real estate market and economic advisory services. Today, Dr. Rosen and Randall Sakamoto are the partners and active managers of the firm consisting of 18 advisory professionals. In addition to serving as Chairman of RCG, Dr. Rosen is Chairman of the Fisher Center for Real Estate and Urban Economics and Professor Emeritus at the Haas School of Business at the University of California, Berkeley.



SAN FRANCISCO BAY AREA COUNTIES



The Golden Gate Sotheby's International Realty statistical report of the regional housing market takes a close look at the ten counties associated with the SF Bay Area (we include Santa Cruz County, as it houses many SF Bay Area workers and is part of the area served by our agents). This report focuses primarily on detached single family homes, with added coverage of the significant condominium market in San Francisco. Data is sourced from local Multiple Listing Service (MLS) organizations. Written analysis is from the Rosen Consulting Group.

SAN FRANCISCO BAY AREA MARKET TRENDS

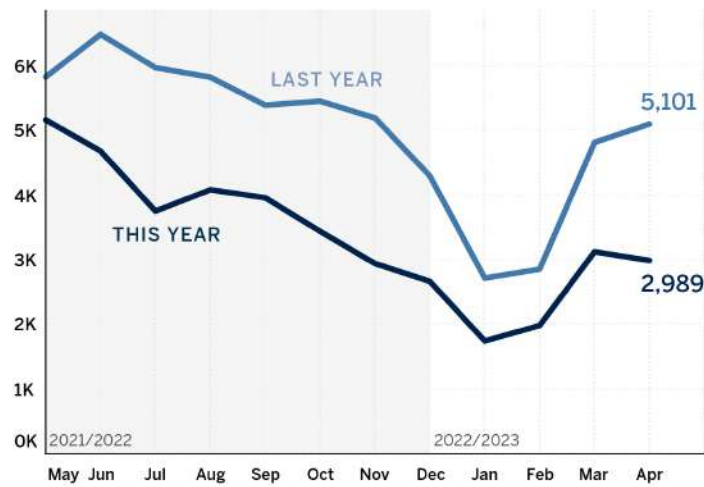
Graphs show trends in market activity for all single family homes sold in the 10 counties in the greater SF Bay Area, comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison.

SAN FRANCISCO BAY AREA SINGLE FAMILY HOMES: APRIL 2023

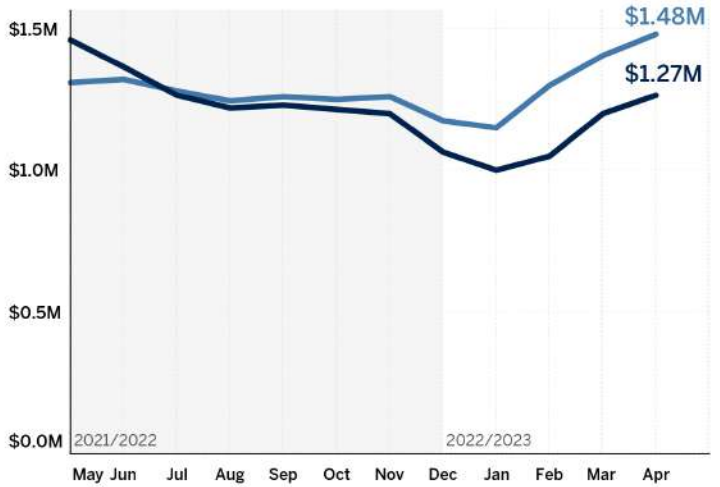
Distribution of Sales



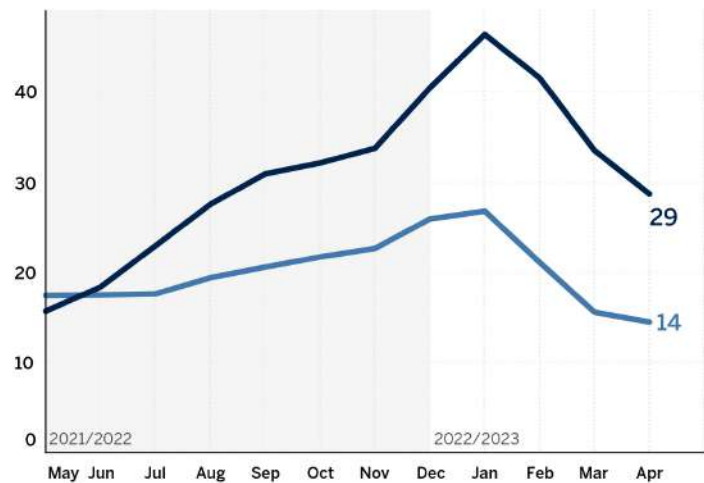
Homes Sold All



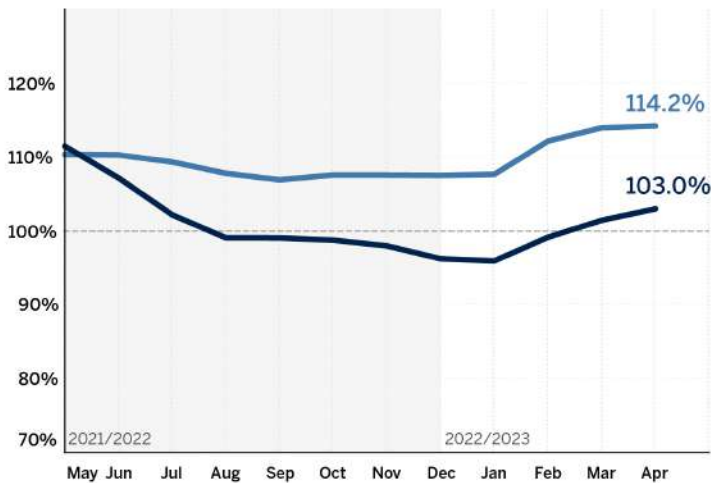
Median Price All



Average Days on Market



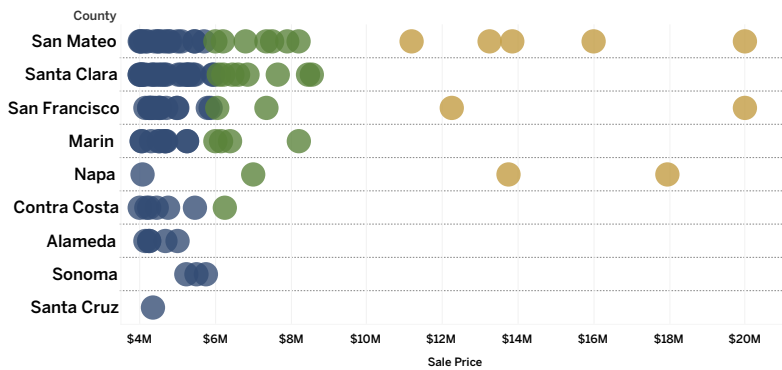
Sold Price as % of Original List Price



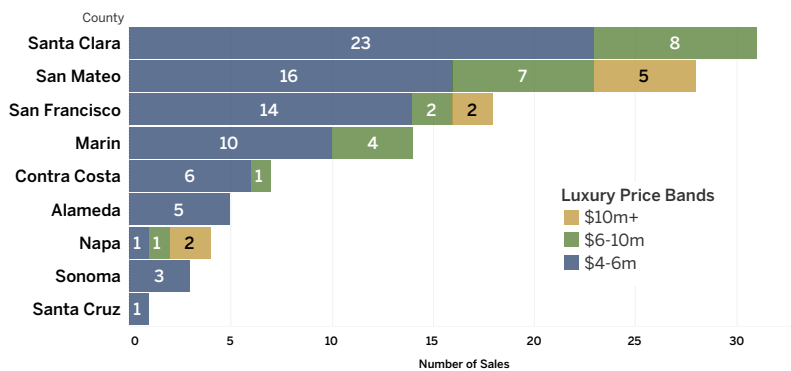
SAN FRANCISCO BAY AREA LUXURY MARKET - \$4 MILLION AND ABOVE

Golden Gate Sotheby's International Realty serves the SF Bay Area luxury home market with exclusive access to the largest international "Luxury MLS" — the Sotheby's International Realty listing syndication platform, which includes sothebysrealty.com and partners that include *Mansion Global*, *The Wall Street Journal*, *James Edition*, *PropGoLuxury.com*, and *Juwai.com*, just to name a few. The platform allows buyers from around the world to locate luxury homes in the SF Bay Area and beyond.

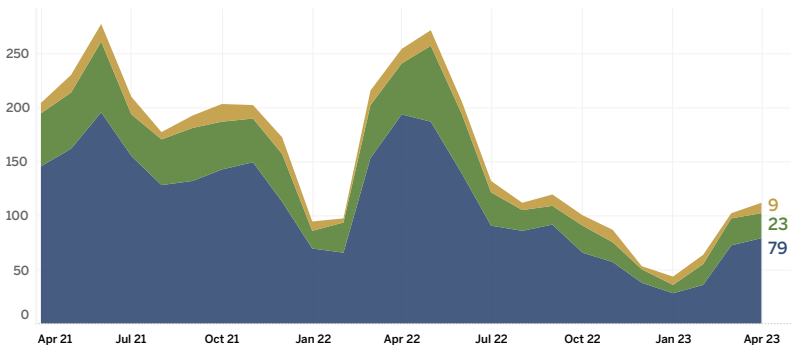
April 2023 Luxury Sales by County and Sale Price



April 2023 Luxury Sales by Price Band



Sales Trends by Price Band



FEATURED SALES

REPRESENTED BY GOLDEN GATE SOTHEBY'S INTERNATIONAL REALTY

\$22,180,000
Stockbridge Avenue, Atherton

\$13,850,000
Coghlan Lane, Atherton

\$12,350,000
Edgewood Drive, Palo Alto

\$6,150,000
Altamont Avenue, Mill Valley

\$6,000,000
Bernal Avenue, Burlingame

\$5,875,000
Union Street, San Francisco

\$4,750,000
Cervantes Road, Redwood City

\$4,700,000
Laurel Grove, Greenbrae

\$4,660,000
Acela Drive, Tiburon

\$4,650,000
Parker Ranch Road, Saratoga

\$4,400,000
Wika Ranch Court, Redwood City

\$4,300,000
Lark Court, Larkspur



SAN FRANCISCO SINGLE FAMILY

SALES BY DISTRICT · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
District 1	\$4,052,778	\$2,525,000	103.3%	\$20,000,000	\$1,228	18	49
District 2	\$1,598,625	\$1,500,000	112.1%	\$3,405,000	\$1,001	32	16
District 3	\$1,348,917	\$1,315,000	106.6%	\$1,950,000	\$912	12	13
District 4	\$2,097,852	\$1,826,000	109.8%	\$4,250,000	\$958	27	24
District 5	\$2,863,750	\$2,600,000	105.8%	\$5,800,000	\$1,202	20	18
District 6	\$3,553,750	\$3,507,500	95.1%	\$4,250,000	\$764	4	109
District 7	\$4,596,429	\$4,540,000	94.6%	\$6,050,000	\$1,025	7	38
District 8	\$3,862,500	\$3,862,500	104.2%	\$4,325,000	\$1,132	2	23
District 9	\$1,838,296	\$1,603,000	102.2%	\$4,300,000	\$872	14	44
District 10	\$1,113,023	\$1,030,000	103.3%	\$2,155,000	\$779	35	36
San Francisco	\$2,181,386	\$1,600,000	105.9%	\$20,000,000	\$976	171	30

DISTRICT 1

Central Richmond, Inner Richmond, Outer Richmond, Jordan Park/Laurel Heights, Presidio, Lake Street, Sea Cliff, Lone Mountain

DISTRICT 2

Golden Gate Heights, Outer Parkside, Outer Sunset, Parkside, Central Sunset, Inner Sunset, Inner Parkside

DISTRICT 3

Lake Shore, Merced Heights, Pine Lake Park, Stonestown, Lakeside, Merced Manor, Ingleside, Ingleside Heights, Oceanview

DISTRICT 4

Balboa Terrace, Diamond Heights, Forest Hill, Forest Knolls, Ingleside Terrace, Midtown Terrace, Saint Francis Wood, Miraloma Park, Forest Hill Extension, Sherwood Forest, Mount Davidson Manor, Westwood Highlands, Westwood Park, Sunnyside, West Portal, Monterey Heights

DISTRICT 5

Glen Park, Haight Ashbury, Noe Valley, Twin Peaks, Cole Valley/Parnassus Heights, Buena Vista/Ashbury Heights, Castro, Corona Heights, Clarendon Heights, Duboce Triangle, Eureka Valley/Dolores Heights, Mission Dolores

DISTRICT 6

Anza Vista, Hayes Valley, Lower Pacific Heights, Western Addition, Alamo Square, North Panhandle

DISTRICT 7

Marina, Pacific Heights, Presidio Heights, Cow Hollow

DISTRICT 8

Downtown, Financial District/Barbary Coast, Nob Hill, North Beach, Russian Hill, Van Ness/Civic Center, Telegraph Hill, North Waterfront, Tenderloin

DISTRICT 9

Bernal Heights, Inner Mission, Mission Bay, Potrero Hill, South of Market, Yerba Buena, South Beach, Central Waterfront/Dogpatch

DISTRICT 10

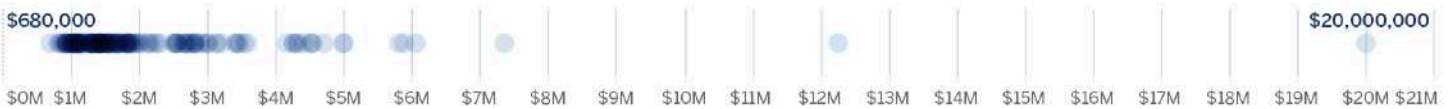
Bayview, Crocker Amazon, Excelsior, Outer Mission, Visitacion Valley, Portola, Silver Terrace, Mission Terrace, Hunter's Point, Bayview Heights, Candlestick, Little Hollywood

SAN FRANCISCO COUNTY SINGLE FAMILY MARKET TRENDS

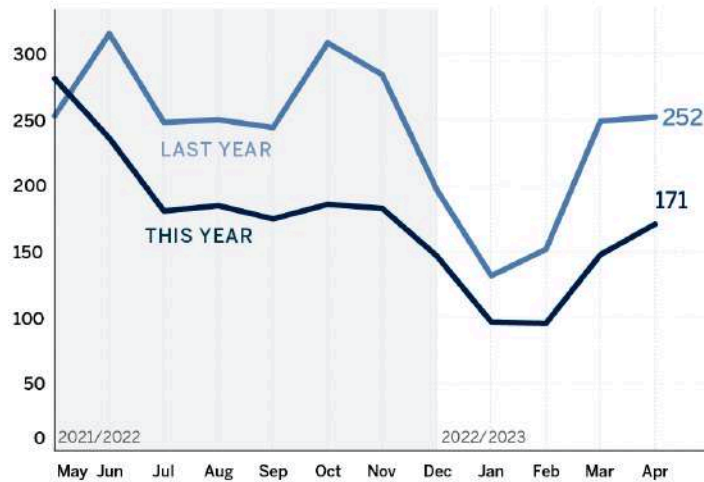
Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

SAN FRANCISCO COUNTY SINGLE FAMILY HOMES: APRIL 2023

Distribution of Sales



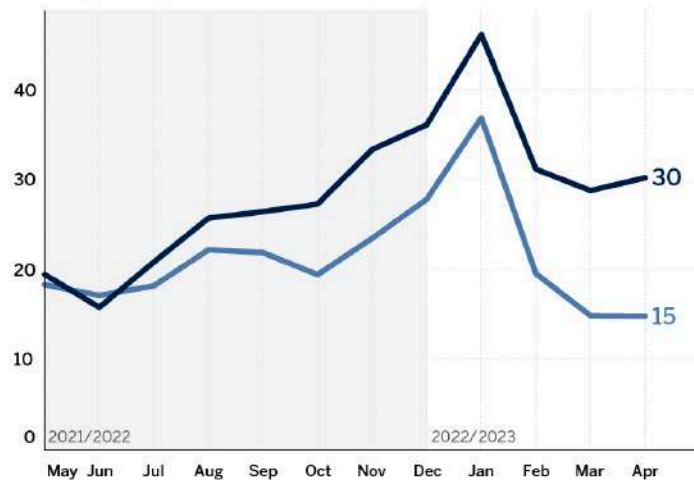
Homes Sold San Francisco



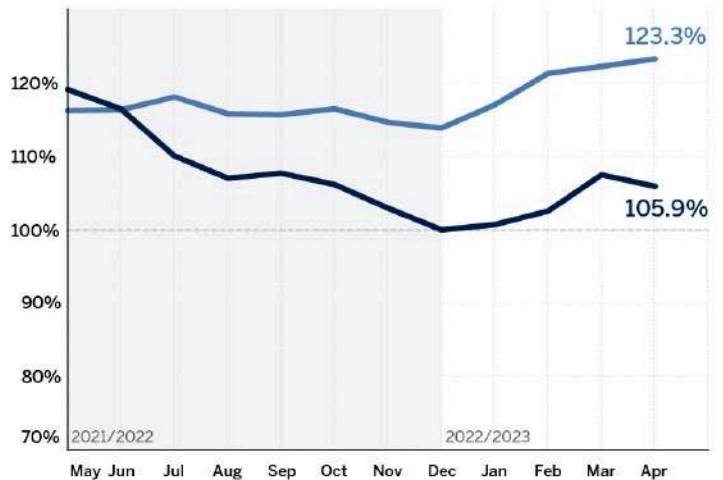
Median Price San Francisco



Average Days on Market



Sold Price as % of Original List Price



SAN FRANCISCO CONDOS

SALES BY DISTRICT · CONDOS · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
District 1	\$1,221,556	\$1,282,000	99.7%	\$1,850,000	\$596	9	37
District 2	\$1,168,125	\$1,225,000	99.8%	\$1,600,000	\$697	8	33
District 3	\$839,000	\$839,000	100.8%	\$948,000	\$596	2	21
District 4	\$570,148	\$420,420	99.7%	\$967,000	\$602	3	112
District 5	\$1,406,294	\$1,241,500	97.3%	\$3,950,000	\$1,009	43	59
District 6	\$1,237,938	\$1,317,500	102.7%	\$1,825,000	\$981	16	40
District 7	\$2,076,666	\$1,695,000	100.4%	\$11,000,000	\$1,183	29	28
District 8	\$1,316,273	\$850,000	93.6%	\$4,950,000	\$882	32	76
District 9	\$1,198,368	\$988,500	97.1%	\$6,100,000	\$963	66	57
District 10	\$895,000	\$895,000	89.9%	\$895,000	\$591	1	48
San Francisco	\$1,370,031	\$1,175,000	97.8%	\$11,000,000	\$955	209	54

DISTRICT 1

Central Richmond, Inner Richmond, Outer Richmond, Jordan Park/Laurel Heights, Presidio, Lake Street, Sea Cliff, Lone Mountain

DISTRICT 2

Golden Gate Heights, Outer Parkside, Outer Sunset, Parkside, Central Sunset, Inner Sunset, Inner Parkside

DISTRICT 3

Lake Shore, Merced Heights, Pine Lake Park, Stonestown, Lakeside, Merced Manor, Ingleside, Ingleside Heights, Oceanview

DISTRICT 4

Balboa Terrace, Diamond Heights, Forest Hill, Forest Knolls, Ingleside Terrace, Midtown Terrace, Saint Francis Wood, Miraloma Park, Forest Hill Extension, Sherwood Forest, Mount Davidson Manor, Westwood Highlands, Westwood Park, Sunnyside, West Portal, Monterey Heights

DISTRICT 5

Glen Park, Haight Ashbury, Noe Valley, Twin Peaks, Cole Valley/Parnassus Heights, Buena Vista/Ashbury Heights, Castro, Corona Heights, Clarendon Heights, Duboce Triangle, Eureka Valley/Dolores Heights, Mission Dolores

DISTRICT 6

Anza Vista, Hayes Valley, Lower Pacific Heights, Western Addition, Alamo Square, North Panhandle

DISTRICT 7

Marina, Pacific Heights, Presidio Heights, Cow Hollow

DISTRICT 8

Downtown, Financial District/Barbary Coast, Nob Hill, North Beach, Russian Hill, Van Ness/Civic Center, Telegraph Hill, North Waterfront, Tenderloin

DISTRICT 9

Bernal Heights, Inner Mission, Mission Bay, Potrero Hill, South of Market, Yerba Buena, South Beach, Central Waterfront/Dogpatch

DISTRICT 10

Bayview, Crocker Amazon, Excelsior, Outer Mission, Visitacion Valley, Portola, Silver Terrace, Mission Terrace, Hunter's Point, Bayview Heights, Candlestick, Little Hollywood

SAN FRANCISCO COUNTY CONDO MARKET TRENDS

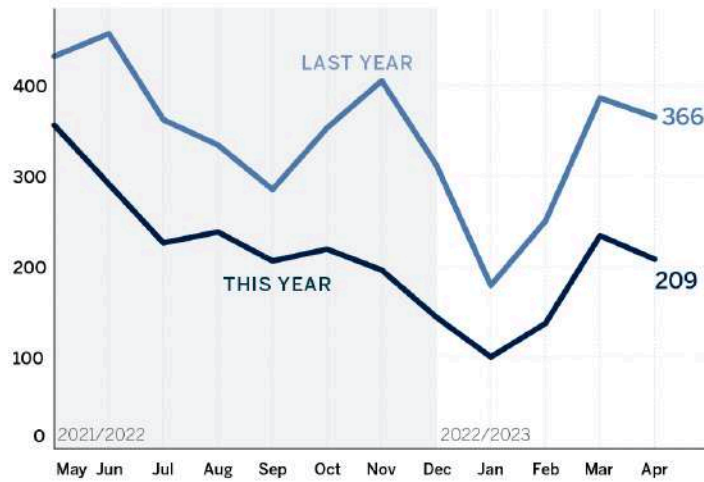
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SAN FRANCISCO COUNTY CONDOS: APRIL 2023

Distribution of Sales



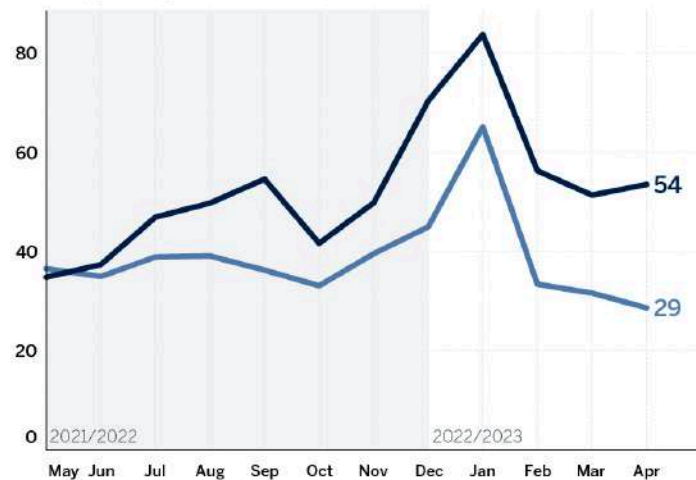
Homes Sold



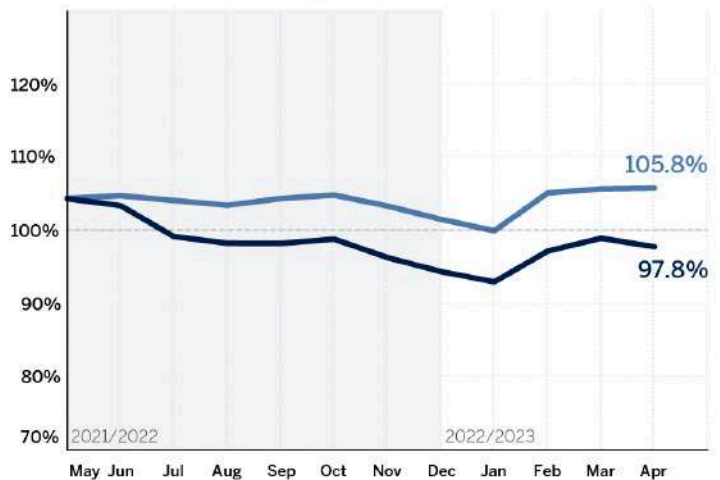
Median Price



Average Days on Market



Sold Price as % of Original List Price





SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alameda	\$1,312,536	\$1,350,000	109.3%	\$1,950,000	\$776	28	18
Albany	\$1,478,875	\$1,325,000	123.4%	\$2,425,000	\$1,048	8	21
Berkeley	\$1,808,250	\$1,687,500	118.7%	\$3,550,000	\$972	28	16
Castro Valley	\$1,293,607	\$1,290,000	104.8%	\$1,900,000	\$654	29	23
Dublin	\$1,678,930	\$1,555,000	102.6%	\$3,100,000	\$743	30	15
Emeryville	-	-	-	-	-	0	-
Fremont	\$1,583,576	\$1,495,000	106.2%	\$3,500,000	\$951	49	13
Hayward	\$951,745	\$837,500	103.4%	\$2,300,000	\$650	60	17
Livermore	\$1,269,655	\$1,229,500	103.5%	\$2,400,000	\$647	60	16
Newark	\$1,227,821	\$1,205,000	105.3%	\$1,599,888	\$786	23	12
Oakland	\$1,155,086	\$970,000	110.7%	\$5,000,000	\$655	157	29
Piedmont	\$2,966,667	\$3,250,000	114.9%	\$3,450,000	\$1,231	3	14
Pleasanton	\$1,965,333	\$1,778,500	103.8%	\$4,680,000	\$862	30	8
San Leandro	\$885,996	\$834,000	103.7%	\$1,625,000	\$616	28	18
San Lorenzo	\$892,625	\$847,500	105.4%	\$1,100,000	\$599	8	13
Sunol	\$1,125,000	\$1,125,000	112.6%	\$1,125,000	\$696	1	7
Union City	\$1,298,949	\$1,288,000	105.0%	\$1,970,000	\$793	20	8
Alameda County	\$1,306,897	\$1,225,000	107.3%	\$5,000,000	\$733	562	19

ALAMEDA COUNTY MARKET TRENDS

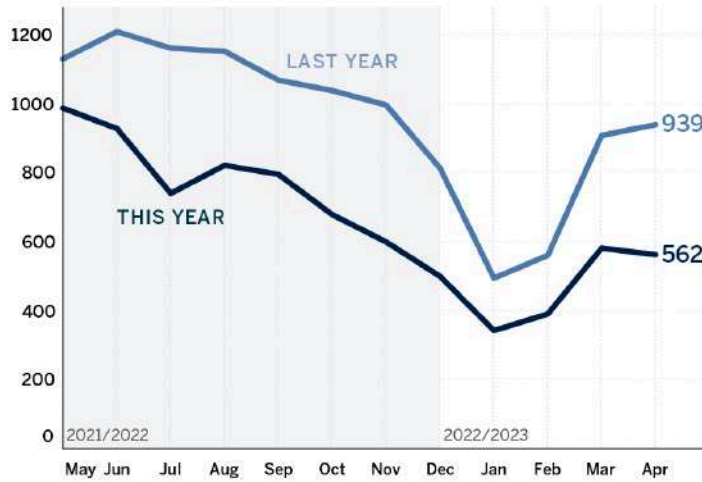
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ALAMEDA COUNTY SINGLE FAMILY HOMES: APRIL 2023

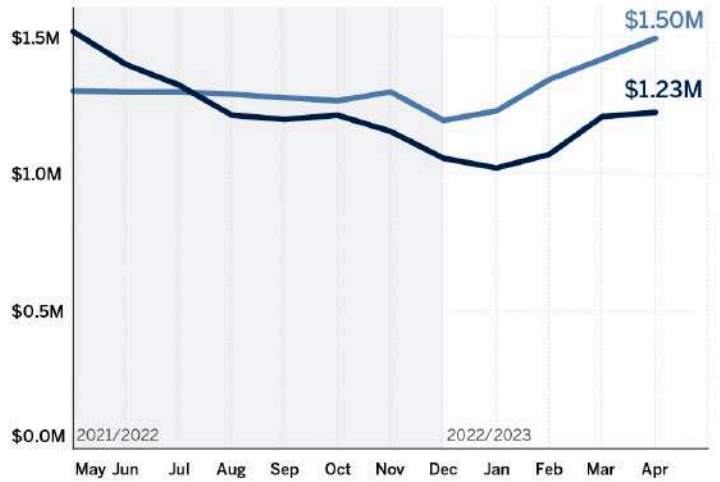
Distribution of Sales



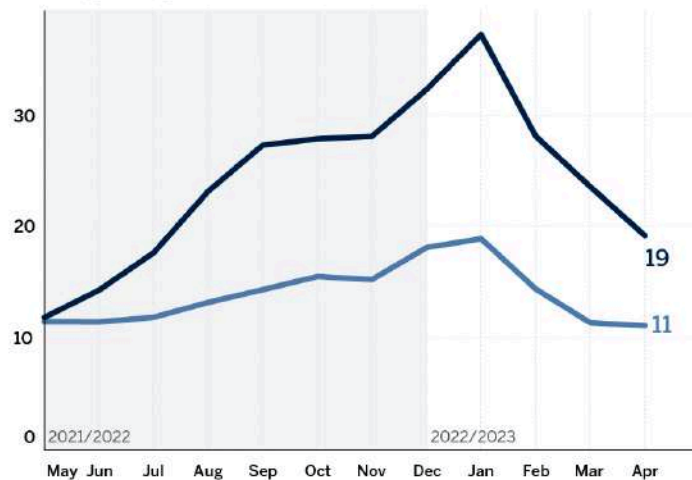
Homes Sold Alameda



Median Price Alameda



Average Days on Market



Sold Price as % of Original List Price



— THIS YEAR
— LAST YEAR

Data Source: MLS. Data is for single family homes only.

CONTRA COSTA COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alamo	\$3,052,699	\$3,069,000	96.6%	\$4,450,000	\$789	17	29
Antioch	\$630,796	\$660,000	99.6%	\$1,150,000	\$322	59	33
Bay Point	\$562,800	\$572,500	101.8%	\$710,000	\$404	10	39
Bethel Island	\$1,082,500	\$1,082,500	91.3%	\$1,100,000	\$486	2	23
Blackhawk	-	-	-	-	-	0	-
Brentwood	\$946,324	\$887,500	97.0%	\$2,800,000	\$364	48	49
Byron	-	-	-	-	-	0	-
Clayton	\$1,209,741	\$1,215,000	111.5%	\$1,611,000	\$588	7	18
Concord	\$844,329	\$775,000	103.2%	\$1,565,000	\$548	57	14
Crockett	\$625,000	\$625,000	100.4%	\$700,000	\$530	2	5
Danville	\$2,097,200	\$1,950,000	100.1%	\$3,598,000	\$775	37	14
Diablo	\$4,986,607	\$5,459,822	93.5%	\$6,250,000	\$844	3	94
Discovery Bay	\$898,064	\$849,000	97.3%	\$1,500,000	\$357	21	29
El Cerrito	\$1,113,500	\$1,100,000	114.4%	\$1,400,000	\$843	10	22
El Sobrante	\$701,833	\$717,500	104.5%	\$901,000	\$448	6	40
Hercules	\$939,157	\$950,000	101.5%	\$1,002,500	\$402	6	45
Kensington	\$1,487,500	\$1,374,500	112.0%	\$2,450,000	\$864	8	18
Lafayette	\$2,699,882	\$2,500,000	105.7%	\$4,750,000	\$896	17	7
Martinez	\$899,043	\$900,000	100.0%	\$1,800,000	\$509	23	22
Moraga	\$2,247,513	\$2,005,000	104.2%	\$4,000,000	\$860	13	9
Oakley	\$678,254	\$682,294	99.4%	\$980,000	\$329	39	35
Orinda	\$2,052,955	\$1,990,000	102.3%	\$3,000,000	\$803	22	24
Pacheco	-	-	-	-	-	0	-
Pinole	\$751,340	\$745,000	100.9%	\$860,000	\$526	10	37
Pittsburg	\$627,295	\$615,000	101.9%	\$995,000	\$377	33	29
Pleasant Hill	\$1,214,247	\$1,140,000	105.9%	\$1,700,000	\$706	17	11
Port Costa	\$450,000	\$450,000	82.6%	\$450,000	\$474	1	56
Richmond	\$762,392	\$687,500	101.9%	\$1,605,000	\$494	38	32
Rodeo	\$1,165,000	\$1,165,000	93.3%	\$1,165,000	\$389	1	48
San Pablo	\$660,500	\$697,500	105.6%	\$850,000	\$513	12	20
San Ramon	\$1,849,500	\$1,735,000	104.3%	\$3,350,000	\$778	46	20
Walnut Creek	\$1,521,846	\$1,415,000	100.2%	\$2,400,000	\$797	26	18
Contra Costa County	\$1,224,864	\$900,000	101.6%	\$6,250,000	\$560	591	26

CONTRA COSTA COUNTY MARKET TRENDS

Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

CONTRA COSTA COUNTY SINGLE FAMILY HOMES: APRIL 2023

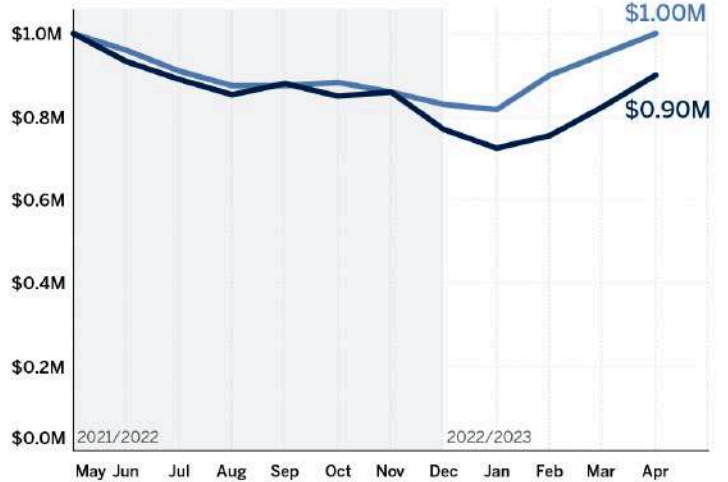
Distribution of Sales



Homes Sold Contra Costa



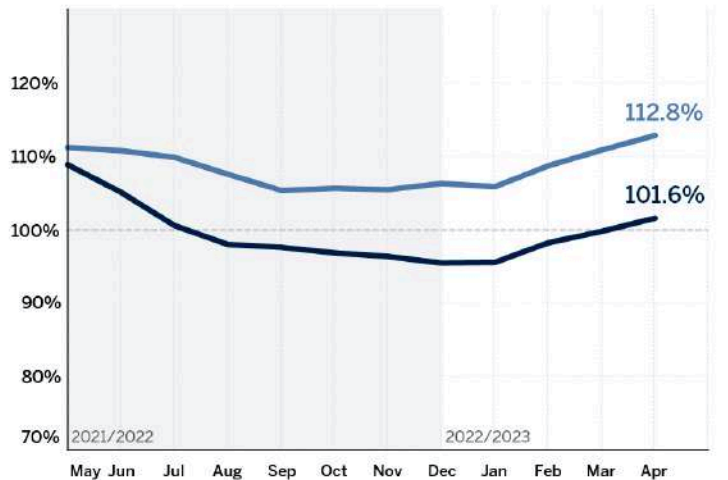
Median Price Contra Costa



Average Days on Market



Sold Price as % of Original List Price





SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Belvedere	\$3,813,500	\$3,813,500	106.8%	\$4,050,000	\$1,334	2	21
Bolinas	-	-	-	-	-	0	-
Corte Madera	\$1,804,286	\$1,825,000	104.5%	\$2,400,000	\$1,011	7	14
Dillon Beach	\$1,490,000	\$1,490,000	99.3%	\$1,490,000	\$664	1	27
Fairfax	\$1,356,500	\$1,271,000	107.3%	\$2,100,000	\$833	8	16
Fallon	-	-	-	-	-	0	-
Forest Knolls	-	-	-	-	-	0	-
Greenbrae	\$2,196,000	\$2,196,000	95.5%	\$2,196,000	\$754	1	47
Inverness	-	-	-	-	-	0	-
Kentfield	\$3,218,600	\$2,188,000	102.9%	\$5,250,000	\$1,203	5	23
Lagunitas	-	-	-	-	-	0	-
Larkspur	\$3,394,176	\$3,362,500	102.6%	\$5,251,703	\$1,331	4	9
Marshall	-	-	-	-	-	0	-
Mill Valley	\$2,981,362	\$2,435,000	102.7%	\$8,207,000	\$1,100	29	31
Muir Beach	-	-	-	-	-	0	-
Nicasio	\$2,810,000	\$2,810,000	100.5%	\$2,810,000	\$698	1	8
Novato	\$1,262,000	\$1,175,000	106.1%	\$3,010,000	\$680	27	21
Olema	-	-	-	-	-	0	-
Pt. Reyes Station	-	-	-	-	-	0	-
Ross	-	-	-	-	-	0	-
San Anselmo	\$2,160,100	\$1,910,500	103.1%	\$6,000,000	\$1,041	10	26
San Geronimo	-	-	-	-	-	0	-
San Rafael	\$1,854,647	\$1,677,500	103.2%	\$3,650,000	\$851	36	27
Sausalito	\$2,240,000	\$1,910,000	102.2%	\$3,550,000	\$945	6	13
Stinson Beach	\$1,675,000	\$1,675,000	104.7%	\$1,675,000	\$1,683	1	18
Tiburon	\$3,083,517	\$2,900,000	101.0%	\$6,388,000	\$1,398	12	25
Tomales	-	-	-	-	-	0	-
Woodacre	\$1,072,500	\$1,072,500	101.1%	\$1,250,000	\$588	2	9
Marin County	\$2,173,939	\$1,817,500	103.6%	\$8,207,000	\$964	152	24

MARIN COUNTY MARKET TRENDS

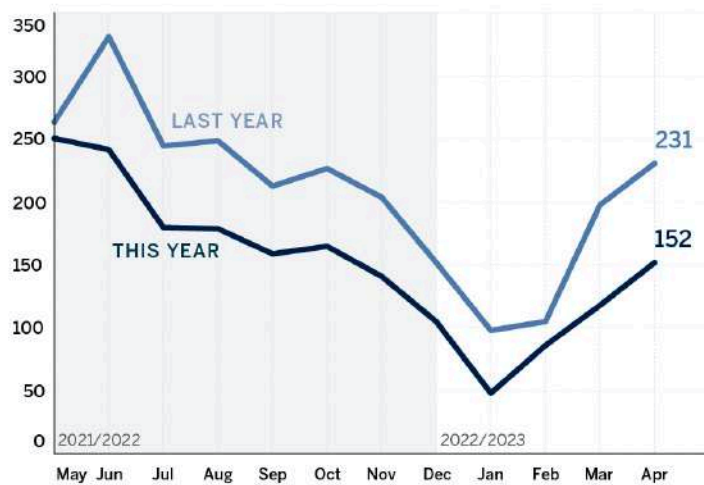
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MARIN COUNTY SINGLE FAMILY HOMES: APRIL 2023

Distribution of Sales



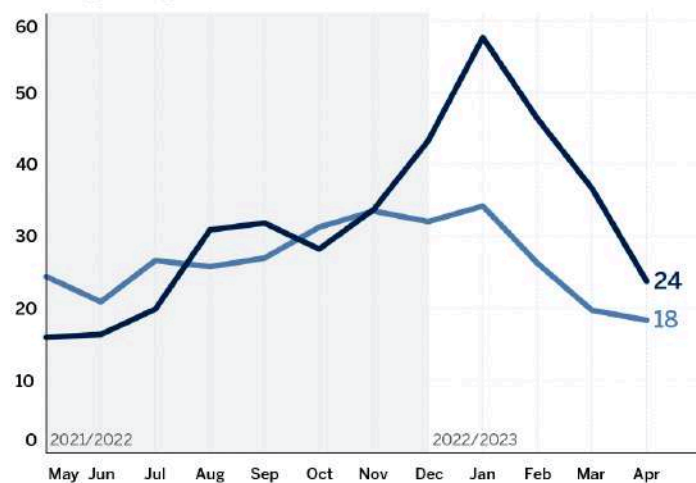
Homes Sold Marin



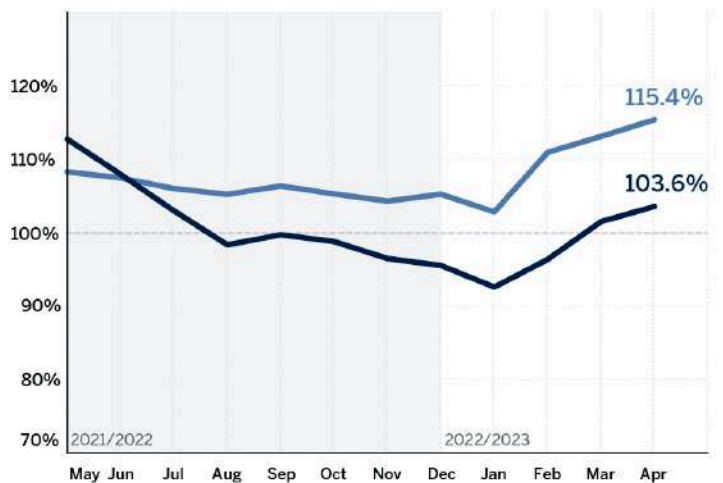
Median Price Marin



Average Days on Market



Sold Price as % of Original List Price





NAPA COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
American Canyon	\$660,769	\$675,000	98.3%	\$865,000	\$361	13	48
Angwin	\$566,000	\$566,000	90.0%	\$566,000	\$367	1	208
Calistoga	\$950,000	\$950,000	104.4%	\$950,000	\$657	1	7
Deer Park	-	-	-	-	-	0	-
Napa	\$1,306,792	\$890,000	96.6%	\$13,750,000	\$587	37	46
Oakville	-	-	-	-	-	0	-
Pope Valley	\$265,000	\$265,000	91.4%	\$265,000	-	1	64
Rutherford	-	-	-	-	-	0	-
St. Helena	\$5,087,143	\$2,200,000	91.7%	\$17,950,000	\$1,205	7	76
Yountville	\$2,800,000	\$2,800,000	94.9%	\$2,800,000	\$1,317	1	200
Napa County	\$1,592,333	\$825,000	96.3%	\$17,950,000	\$609	61	55

NAPA COUNTY MARKET TRENDS

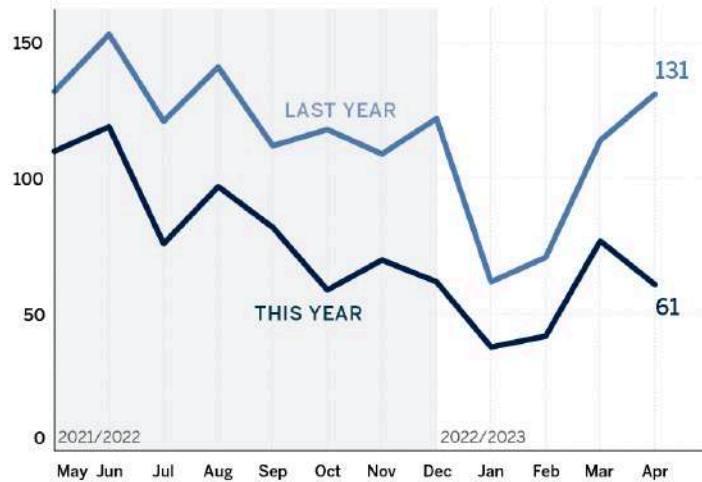
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NAPA COUNTY SINGLE FAMILY HOMES: APRIL 2023

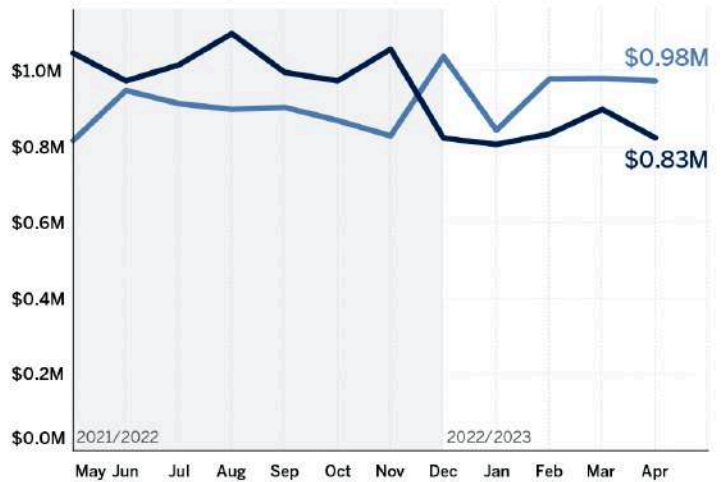
Distribution of Sales



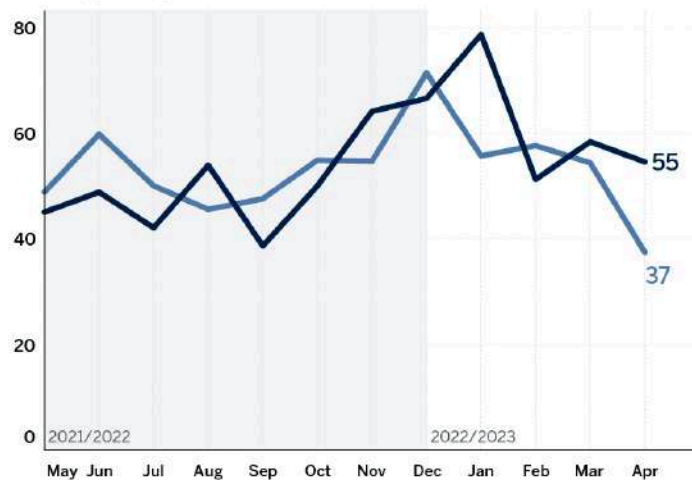
Homes Sold Napa



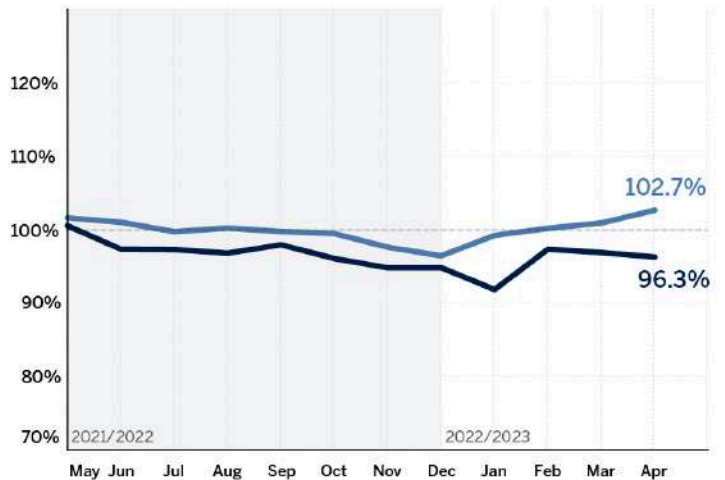
Median Price Napa



Average Days on Market



Sold Price as % of Original List Price



SAN MATEO COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Atherton	\$12,509,500	\$12,519,000	91.4%	\$20,000,000	\$1,715	4	37
Belmont	\$2,395,000	\$2,400,000	100.3%	\$3,100,000	\$1,140	12	24
Brisbane	\$1,653,333	\$1,410,000	106.0%	\$2,300,000	\$934	3	23
Burlingame	\$3,450,821	\$2,908,444	97.1%	\$6,000,000	\$1,442	10	32
Colma	\$750,000	\$750,000	100.1%	\$750,000	-	1	17
Daly City	\$1,124,850	\$1,100,000	105.7%	\$1,555,000	\$813	20	21
East Palo Alto	\$900,750	\$876,500	107.2%	\$1,145,000	\$831	8	9
El Granada	\$1,450,000	\$1,450,000	91.0%	\$1,575,000	\$629	2	36
Foster City	\$2,347,500	\$2,405,000	103.5%	\$3,150,000	\$1,058	4	9
Half Moon Bay	\$1,652,563	\$1,665,000	95.7%	\$1,800,000	\$720	8	53
Hillsborough	\$6,371,875	\$5,275,000	98.2%	\$13,250,000	\$1,530	8	11
La Honda	-	-	-	-	-	0	-
Loma Mar	-	-	-	-	-	0	-
Menlo Park	\$3,443,000	\$3,450,000	97.3%	\$8,200,000	\$1,474	17	28
Millbrae	\$1,814,585	\$1,975,000	102.6%	\$2,448,000	\$1,009	7	30
Montara	\$1,555,000	\$1,555,000	111.2%	\$1,555,000	\$818	1	4
Moss Beach	-	-	-	-	-	0	-
Pacifica	\$1,358,818	\$1,300,000	106.2%	\$1,870,000	\$903	11	18
Pescadero	-	-	-	-	-	0	-
Portola Valley	\$2,900,000	\$2,900,000	91.1%	\$3,800,000	\$1,244	2	36
Redwood City	\$2,034,912	\$1,957,500	100.2%	\$4,750,000	\$1,178	34	20
Redwood Shores	\$2,360,000	\$2,360,000	102.0%	\$2,760,000	\$1,150	2	14
San Bruno	\$1,307,432	\$1,281,888	111.7%	\$1,600,000	\$1,127	9	12
San Carlos	\$2,341,714	\$2,200,000	103.4%	\$4,025,000	\$1,238	21	17
San Gregorio	-	-	-	-	-	0	-
San Mateo	\$1,987,112	\$1,945,000	99.2%	\$4,500,000	\$1,075	28	42
South San Francisco	\$1,226,077	\$1,300,000	107.1%	\$1,550,000	\$867	13	11
Woodside	\$6,661,000	\$6,800,000	92.9%	\$16,000,000	\$3,319	5	82
San Mateo County	\$2,428,056	\$1,800,000	101.4%	\$20,000,000	\$1,163	230	25

SAN MATEO COUNTY MARKET TRENDS

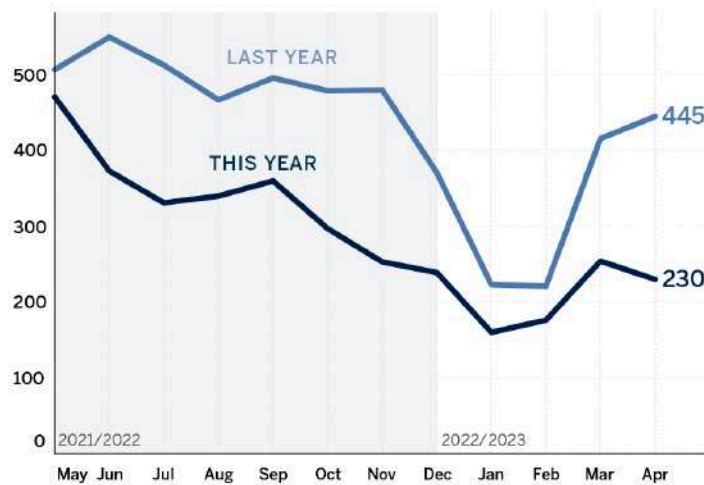
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SAN MATEO COUNTY SINGLE FAMILY HOMES: APRIL 2023

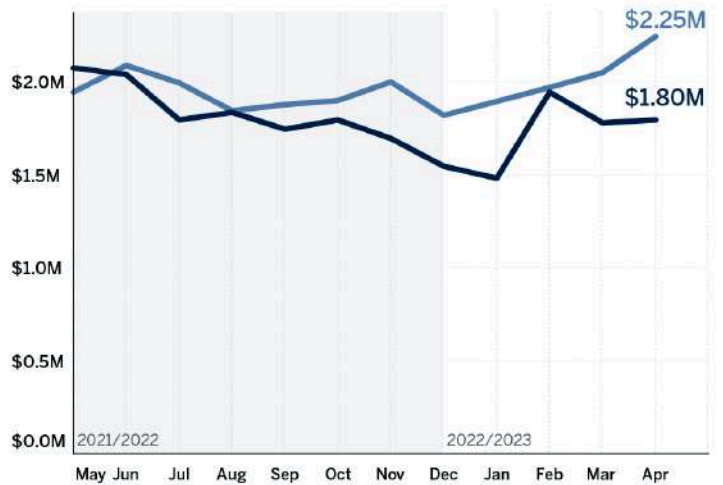
Distribution of Sales



Homes Sold San Mateo



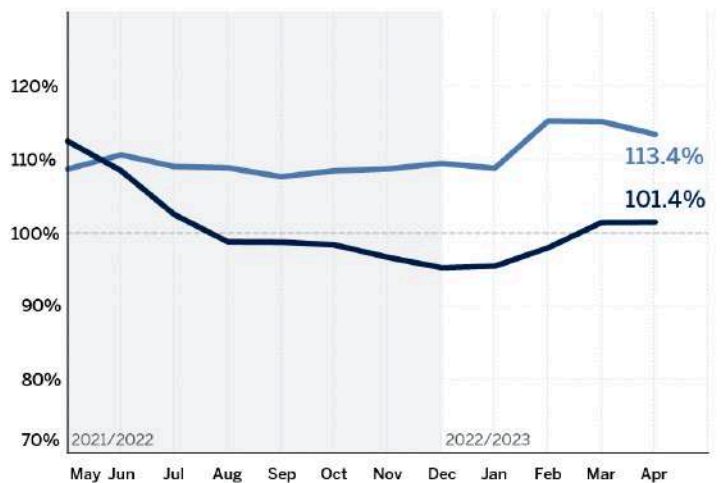
Median Price San Mateo



Average Days on Market



Sold Price as % of Original List Price



SANTA CLARA COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Alviso	-	-	-	-	-	0	-
Campbell	\$1,931,429	\$1,787,500	104.7%	\$3,050,000	\$1,163	14	7
Cupertino	\$3,136,808	\$2,830,000	107.2%	\$5,297,500	\$1,521	13	11
Gilroy	\$1,305,431	\$1,153,944	98.7%	\$2,800,000	\$543	24	28
Los Altos	\$4,481,021	\$4,000,200	103.2%	\$8,550,000	\$1,681	14	10
Los Altos Hills	\$6,075,000	\$6,075,000	111.2%	\$6,850,000	\$2,075	2	7
Los Gatos	\$2,675,630	\$2,612,500	100.3%	\$5,400,000	\$1,234	30	19
Milpitas	\$1,495,876	\$1,422,500	102.6%	\$2,515,000	\$891	20	20
Monte Sereno	\$3,505,000	\$2,905,000	98.6%	\$6,210,000	\$1,256	6	24
Morgan Hill	\$1,513,047	\$1,510,200	103.1%	\$2,050,000	\$619	15	17
Mountain View	\$2,761,385	\$2,810,000	105.6%	\$3,700,000	\$1,677	13	8
Palo Alto	\$3,542,694	\$3,100,000	101.9%	\$7,650,000	\$1,836	27	23
San Jose	\$1,657,783	\$1,510,000	104.4%	\$4,700,000	\$942	306	19
San Martin	-	-	-	-	-	0	-
Santa Clara	\$1,765,257	\$1,736,500	110.2%	\$2,600,000	\$1,231	28	13
Saratoga	\$3,958,287	\$3,780,000	97.8%	\$8,450,000	\$1,462	24	44
Stanford	\$2,628,000	\$2,628,000	99.2%	\$2,628,000	\$913	1	13
Sunnyvale	\$2,221,610	\$2,250,000	107.6%	\$3,290,000	\$1,353	47	13
Santa Clara County	\$2,086,040	\$1,771,500	104.0%	\$8,550,000	\$1,100	584	19

SANTA CLARA COUNTY MARKET TRENDS

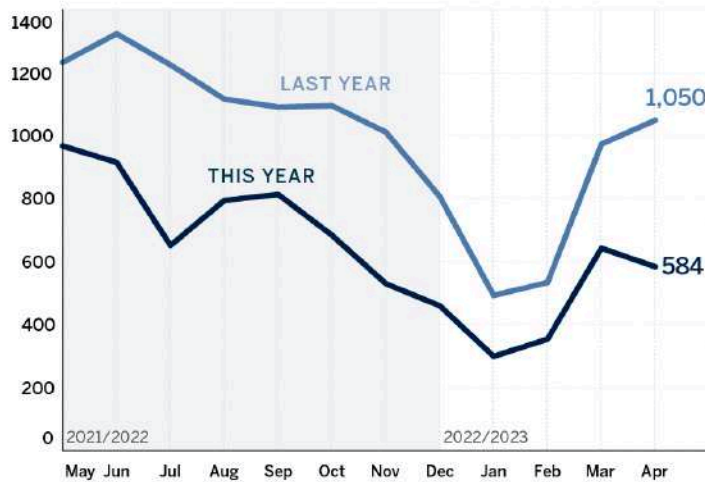
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SANTA CLARA COUNTY SINGLE FAMILY HOMES: APRIL 2023

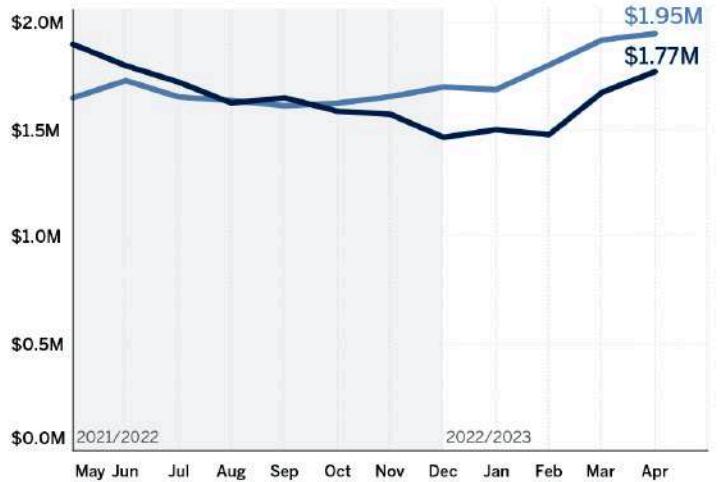
Distribution of Sales



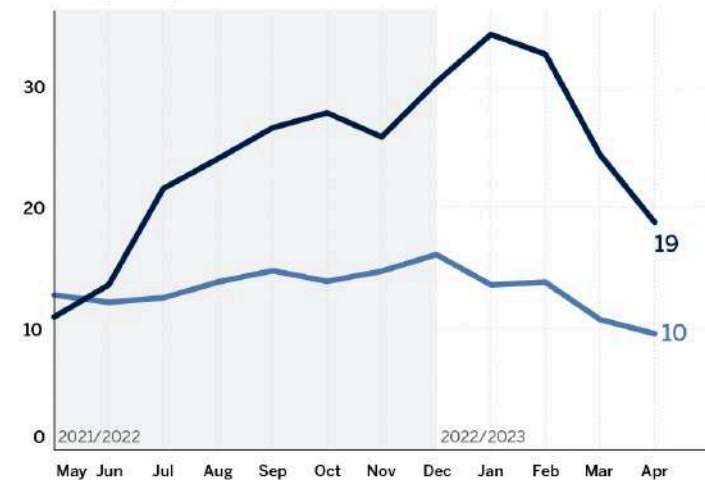
Homes Sold Santa Clara



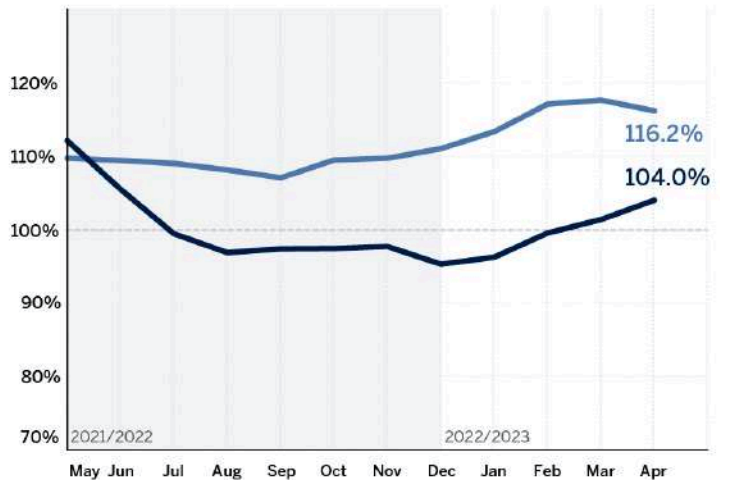
Median Price Santa Clara



Average Days on Market



Sold Price as % of Original List Price





SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Aptos	\$1,752,400	\$1,625,000	101.9%	\$3,000,000	\$995	15	20
Ben Lomond	\$1,250,000	\$1,250,000	96.2%	\$1,250,000	\$527	1	15
Boulder Creek	\$898,370	\$809,350	100.4%	\$1,800,000	\$564	10	42
Brookdale	-	-	-	-	-	0	-
Capitola	\$1,966,667	\$2,250,000	99.8%	\$2,600,000	\$1,422	3	7
Corralitos	-	-	-	-	-	0	-
Davenport	-	-	-	-	-	0	-
Felton	\$1,045,000	\$1,000,000	99.5%	\$1,575,000	\$859	4	19
Freedom	-	-	-	-	-	0	-
La Selva Beach	-	-	-	-	-	0	-
Los Gatos	\$1,418,250	\$1,506,500	93.0%	\$1,750,000	\$580	4	140
Mount Hermon	\$550,000	\$550,000	88.0%	\$550,000	\$862	1	69
Santa Cruz	\$1,698,819	\$1,607,500	99.8%	\$3,150,000	\$884	18	34
Scotts Valley	\$1,384,583	\$1,272,500	101.0%	\$1,862,500	\$696	6	15
Seacliff	-	-	-	-	-	0	-
Soquel	\$1,490,000	\$1,490,000	97.8%	\$1,730,000	\$643	2	26
Watsonville	\$1,050,625	\$707,500	94.5%	\$4,350,000	\$615	12	55
Santa Cruz County	\$1,411,795	\$1,349,500	98.9%	\$4,350,000	\$799	76	38

SANTA CRUZ COUNTY MARKET TRENDS

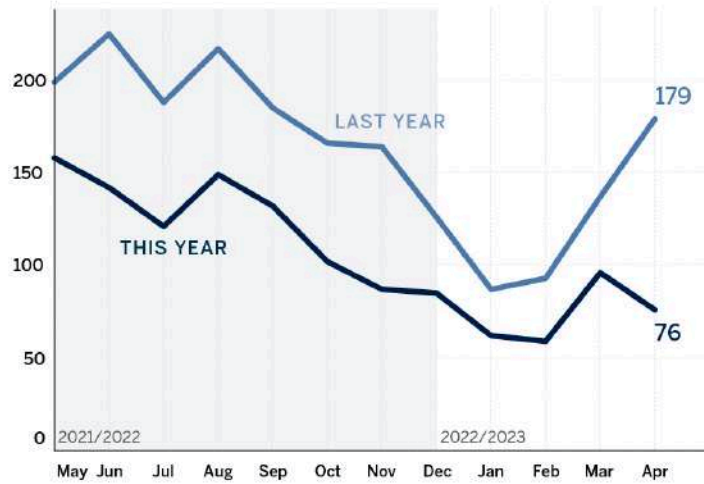
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SANTA CRUZ COUNTY SINGLE FAMILY HOMES: APRIL 2023

Distribution of Sales



Homes Sold Santa Cruz



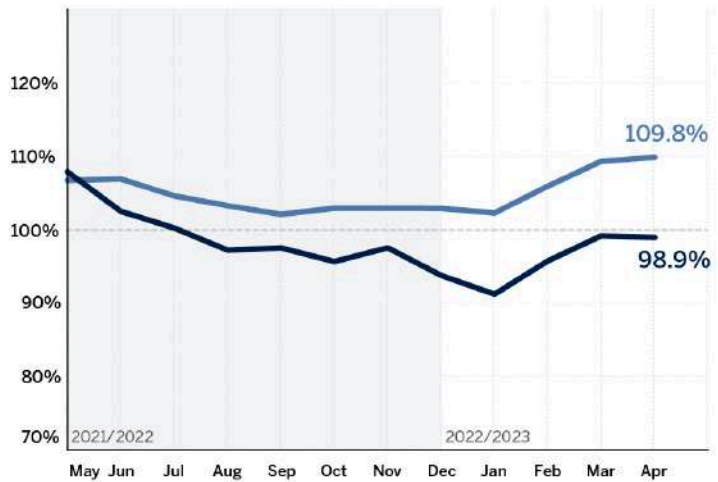
Median Price Santa Cruz



Average Days on Market



Sold Price as % of Original List Price





SOLANO COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Benicia	\$883,867	\$899,000	99.9%	\$1,275,000	\$444	15	44
Birds Landing	-	-	-	-	-	0	-
Dixon	\$661,295	\$650,000	102.0%	\$829,990	\$288	13	52
Elmira	-	-	-	-	-	0	-
Fairfield	\$651,928	\$637,500	100.5%	\$1,388,000	\$351	72	34
Rio Vista	\$485,420	\$458,900	97.6%	\$1,175,000	\$281	31	60
Suisun City	\$535,498	\$531,000	99.7%	\$625,970	\$337	13	32
Vacaville	\$623,958	\$565,000	98.4%	\$2,215,000	\$359	86	46
Vallejo	\$560,547	\$540,000	98.5%	\$1,000,000	\$374	67	55
Winters	-	-	-	-	-	0	-
Solano County	\$612,862	\$574,960	99.2%	\$2,215,000	\$352	297	46

SOLANO COUNTY MARKET TRENDS

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SOLANO COUNTY SINGLE FAMILY HOMES: APRIL 2023

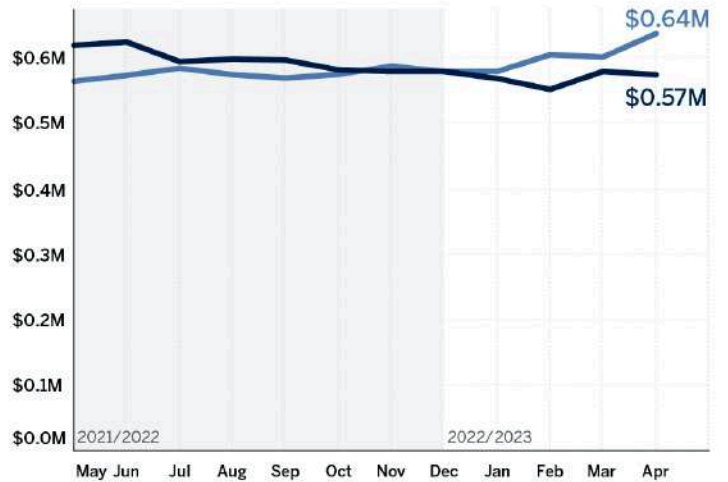
Distribution of Sales



Homes Sold Solano



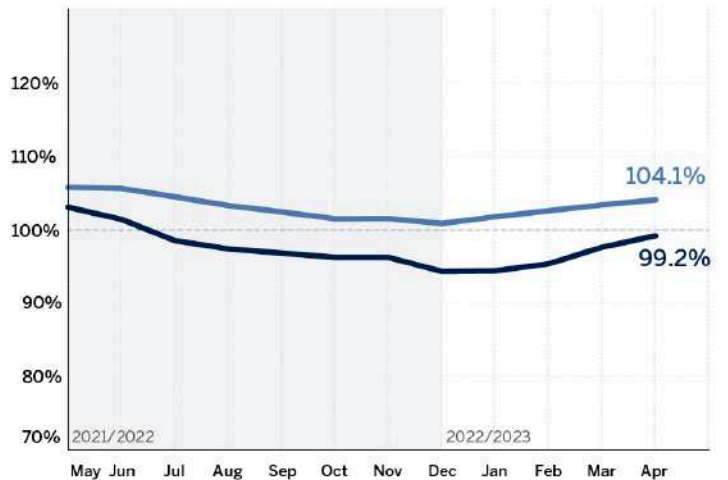
Median Price Solano



Average Days on Market



Sold Price as % of Original List Price



SONOMA COUNTY

SALES BY CITY · SINGLE FAMILY HOMES · APRIL 2023

City	Average	Median	Sale/List Price	High Sale	Price/SF	# of Sales	DOM
Annapolis	-	-	-	-	-	0	-
Bodega	\$1,400,000	\$1,400,000	87.8%	\$1,400,000	\$693	1	209
Bodega Bay	\$1,100,000	\$1,075,000	88.5%	\$1,325,000	\$744	3	164
Boyes Hot Springs	-	-	-	-	-	0	-
Camp Meeker	\$538,000	\$538,000	109.3%	\$645,000	\$688	2	27
Cazadero	\$284,050	\$284,050	95.0%	\$284,050	\$338	1	153
Cloverdale	\$731,250	\$689,250	100.7%	\$850,000	\$351	6	47
Cotati	\$658,400	\$660,000	102.1%	\$814,000	\$508	5	25
Duncans Mills	-	-	-	-	-	0	-
Forestville	\$767,500	\$767,500	104.0%	\$950,000	\$651	2	24
Duncans Mills	\$1,150,000	\$1,150,000	76.7%	\$1,150,000	\$366	1	339
Fulton	\$1,675,000	\$1,675,000	111.7%	\$1,675,000	\$619	1	6
Geyserville	\$1,100,000	\$1,100,000	102.3%	\$1,100,000	\$733	1	26
Glen Ellen	\$2,795,000	\$2,795,000	100.0%	\$2,795,000	\$1,177	1	16
Graton	\$1,125,000	\$1,125,000	100.0%	\$1,125,000	-	1	35
Guerneville	\$639,667	\$630,000	94.4%	\$1,332,500	\$616	9	33
Healdsburg	\$2,200,429	\$1,362,500	100.3%	\$5,750,000	\$985	14	80
Jenner	-	-	-	-	-	0	-
Kenwood	\$1,700,000	\$1,700,000	94.7%	\$1,700,000	-	1	177
Monte Rio	-	-	-	-	-	0	-
Occidental	-	-	-	-	-	0	-
Penngrrove	-	-	-	-	-	0	-
Petaluma	\$1,189,838	\$1,002,500	99.6%	\$3,000,000	\$580	30	49
Rio Nido	\$499,000	\$499,000	100.0%	\$499,000	\$832	1	78
Rohnert Park	\$776,962	\$800,000	99.6%	\$885,000	\$429	19	36
Santa Rosa	\$997,695	\$810,000	99.8%	\$3,675,000	\$500	105	53
Sebastopol	\$1,512,444	\$1,262,500	107.7%	\$3,250,000	\$750	18	46
Sonoma	\$1,214,913	\$950,000	99.9%	\$3,825,000	\$761	23	49
The Sea Ranch	\$1,651,863	\$1,372,000	99.4%	\$2,283,590	\$1,087	3	16
Timber Cove	-	-	-	-	-	0	-
Valley Ford	-	-	-	-	-	0	-
Windsor	\$880,471	\$759,000	109.1%	\$2,310,000	\$489	17	59
Sonoma County	\$1,102,595	\$850,000	100.6%	\$5,750,000	\$582	265	53

SONOMA COUNTY MARKET TRENDS

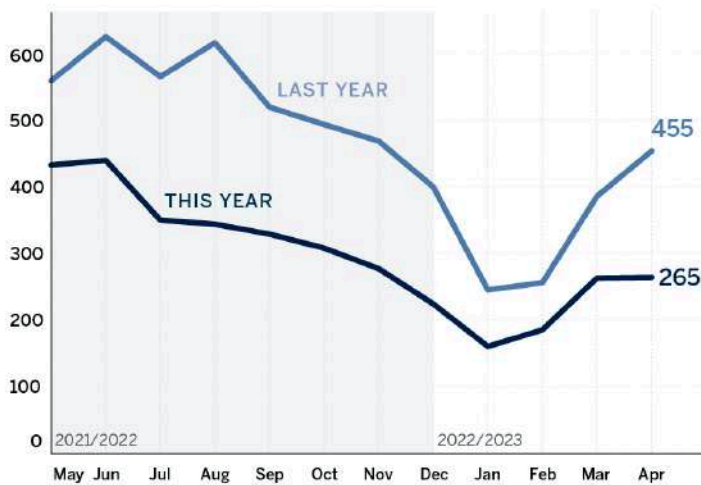
Graphs show trends in market activity for the county comparing this year (dark lines) with last year (light lines) for the same period. Data is gathered from Multiple Listing Service (MLS) sources, reviewed for accuracy, and charted for easy comparison. Data shown is for single family homes only.

SONOMA COUNTY SINGLE FAMILY HOMES: APRIL 2023

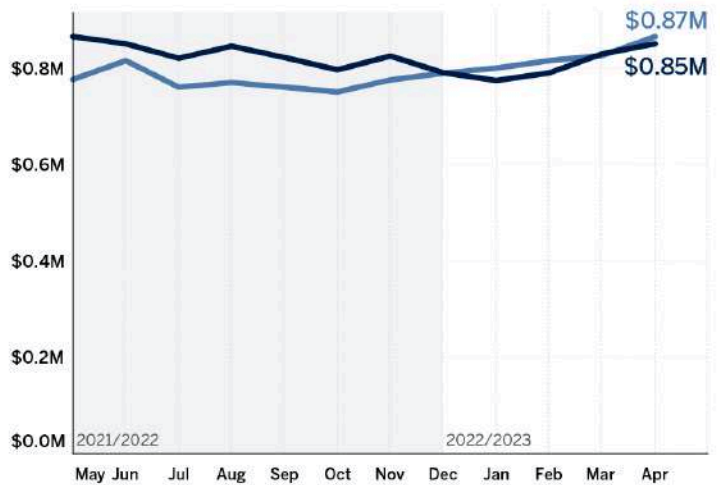
Distribution of Sales



Homes Sold Sonoma



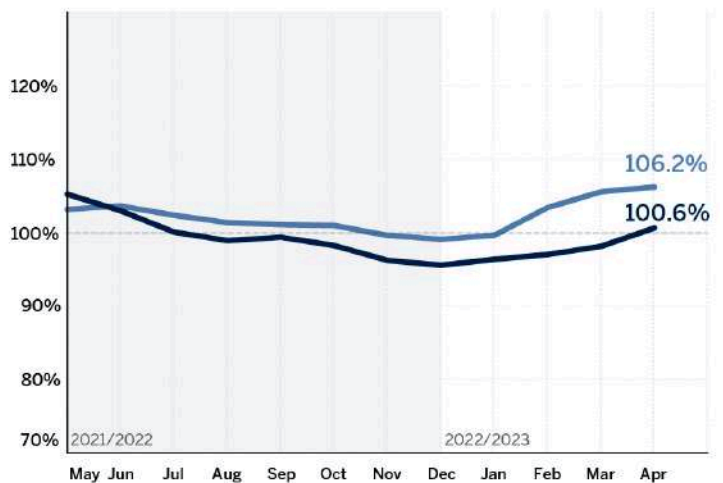
Median Price Sonoma



Average Days on Market



Sold Price as % of Original List Price



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Berkeley Office 510.542.2600	Oakland-Piedmont-Montclair 510.339.4000	Danville Office 925.838.9700
North Berkeley Office 510.883.7000	Lafayette Office 925.283.7866	Elmwood Office 510.883.7000

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Drakes Landing Office 415.464.9300	Ross Valley Office 415.461.7200	Sausalito Office 415.331.9000
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Redwood City 650.577.3700	Woodside Office 650.851.6600	San Carlos 650.597.1800
Burlingame 650.865.3000	Los Gatos 408.358.2800	

WINE COUNTRY OFFICES

Napa Downtown 707.690.9500	Napa 707.255.0845
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