



## Marin County: Quarterly Real Estate Market Dynamics

Market indicators are often seasonal in nature, with Q2 typically being the period of highest demand, and the mid-winter holiday period being the period of lowest activity. The pandemic gravely affected Q2 2020 market activity, but the quarterly statistics disguise the steep decline followed by the dramatic rebound that occurred over the course of the 3 months. A few monthly charts have been added to illustrate this dynamic.

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Data from sources deemed reliable, but may contain errors and subject to revision. All numbers to be considered approximate.

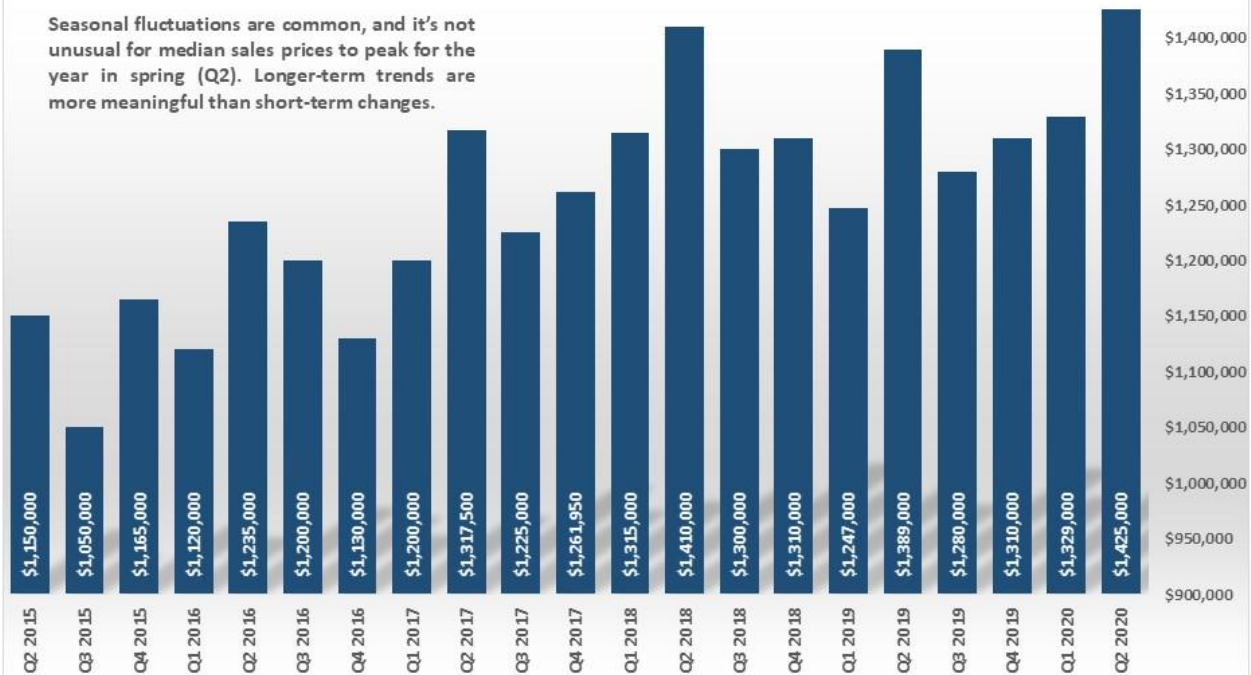
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## Marin County House Price Appreciation

### Median House Sales Prices, 2015 – Present, by Quarter

As reported to MLS,  
per Broker Metrics

Seasonal fluctuations are common, and it's not unusual for median sales prices to peak for the year in spring (Q2). Longer-term trends are more meaningful than short-term changes.

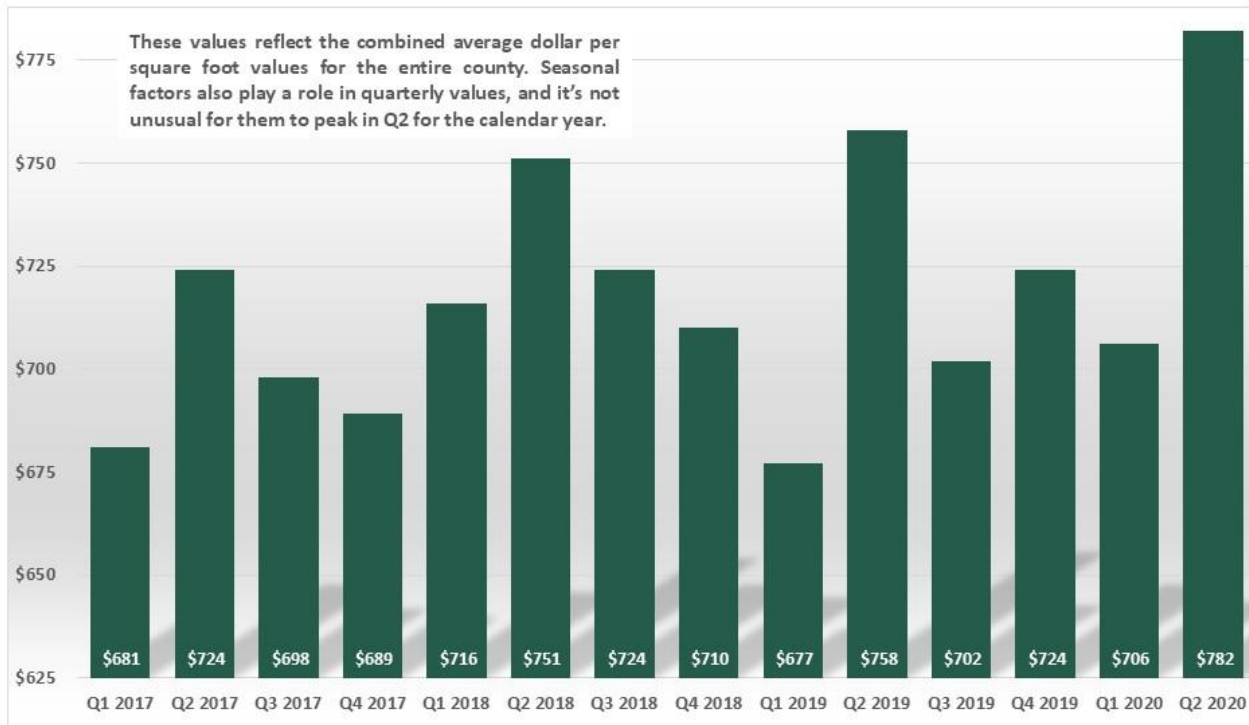


Median sales price is that price at which half the sales occurred for more and half for less. It is a very general statistic that can be affected by other factors besides changes in fair market value. All numbers are approximate and subject to revision.

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## Marin County House Values

Average Dollar per Square Foot Values, by Quarter



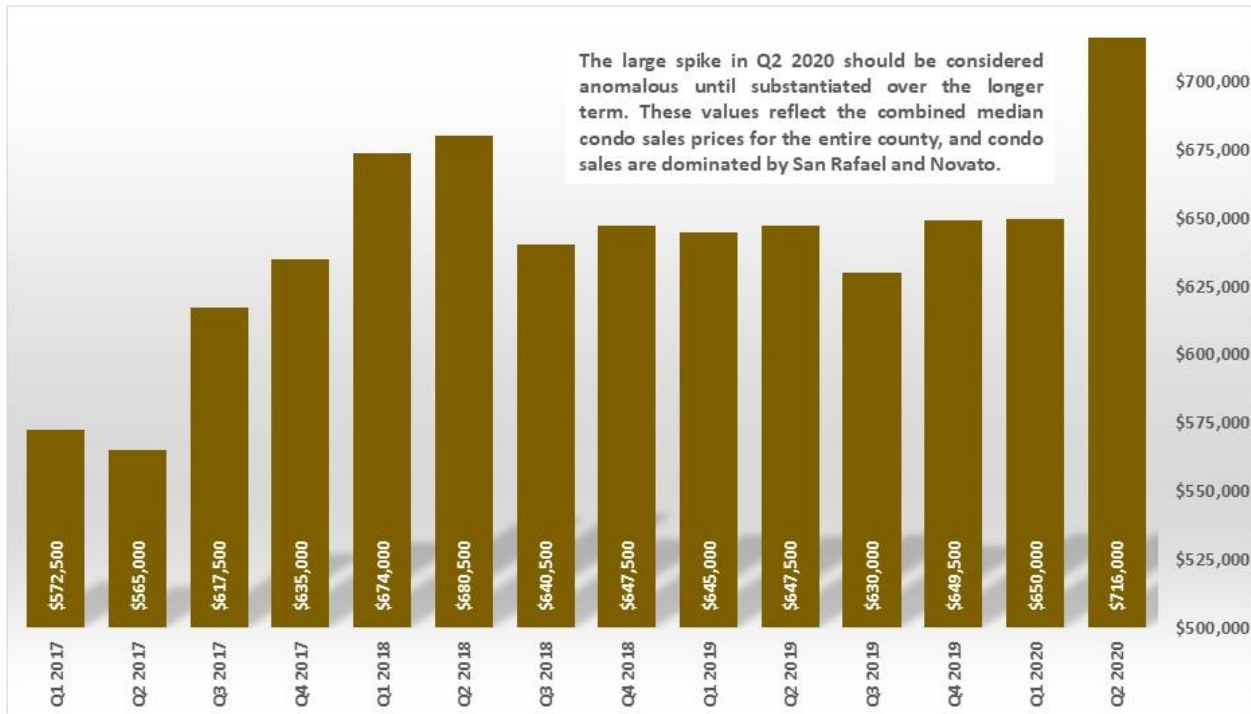
MLS house sales data per Broker Metrics: deemed reliable but may contain errors and is subject to revision. All numbers approximate.

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## Marin County Condo Prices by Quarter

### Median Condo Sales Prices, 2017 – Present

As reported to MLS,  
per Broker Metrics

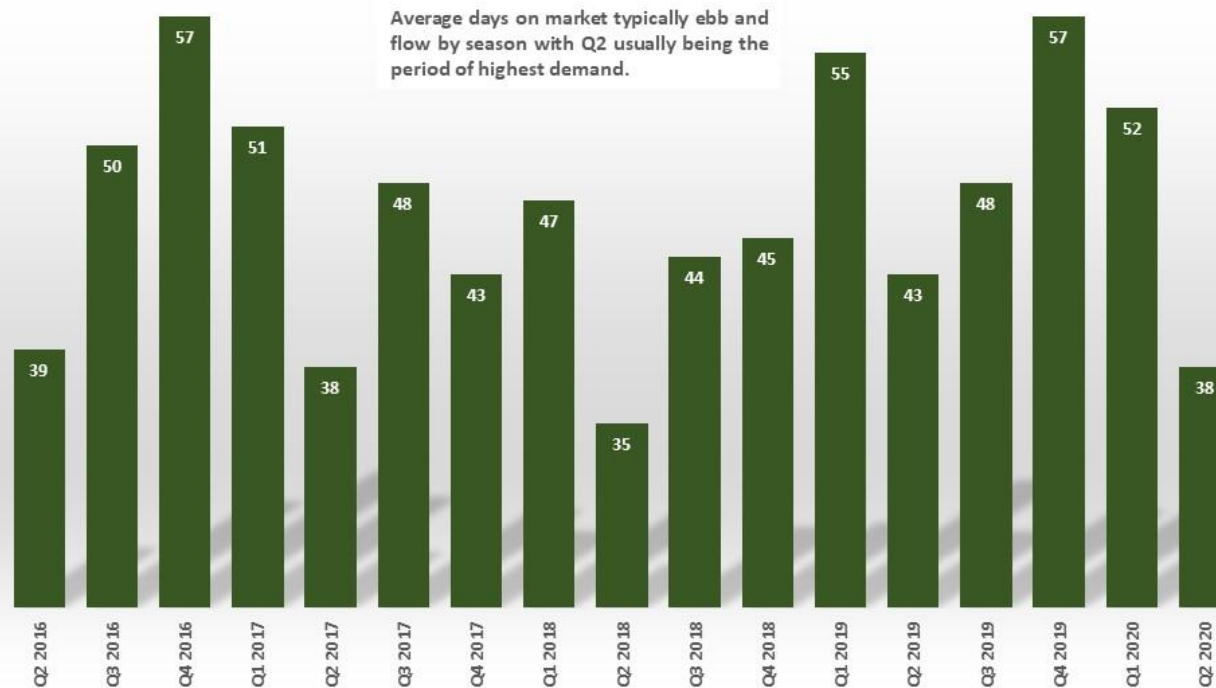


Median sales price is that price at which half the sales occurred for more and half for less. It is a very general statistic that can be affected by other factors besides changes in fair market value. All numbers are approximate and subject to revision.

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## Average Days on Market by Quarter Marin County Market Dynamics, 2016 to Present

House and condo sales up to \$3 million, as reported to MLS



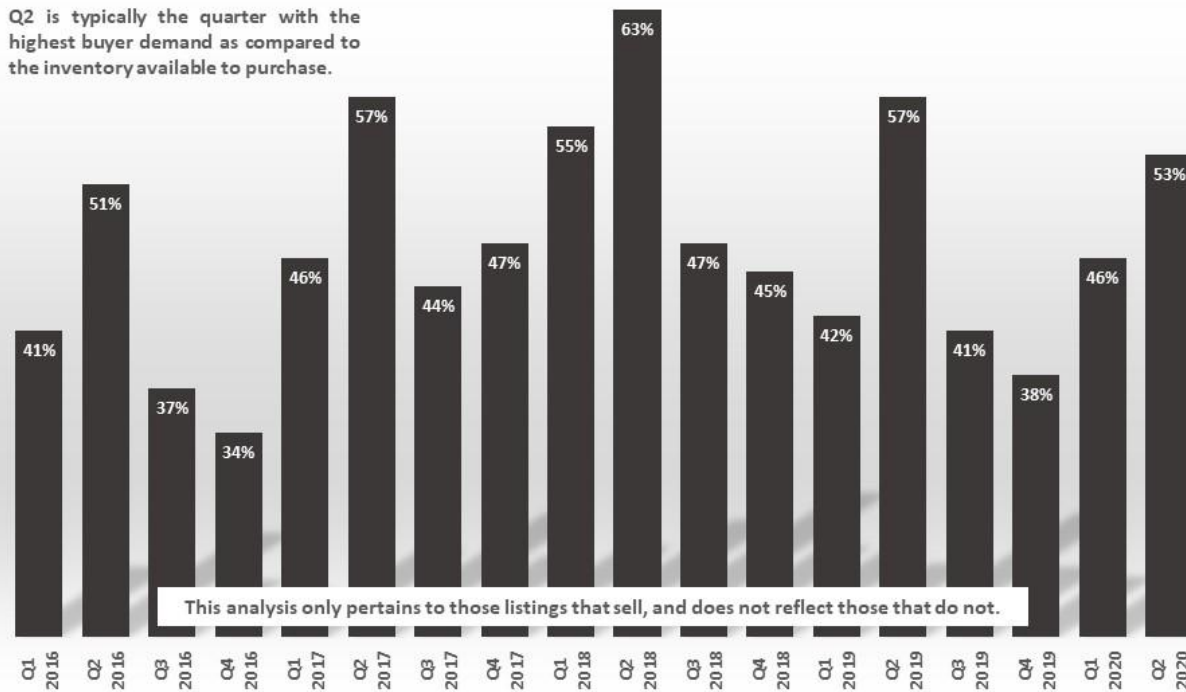
Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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## Percentage of Home Sales Selling Within 30 Days Marin County Quarterly Market Trends since 2016

House and condo sales  
reported to MLS

Q2 is typically the quarter with the highest buyer demand as compared to the inventory available to purchase.

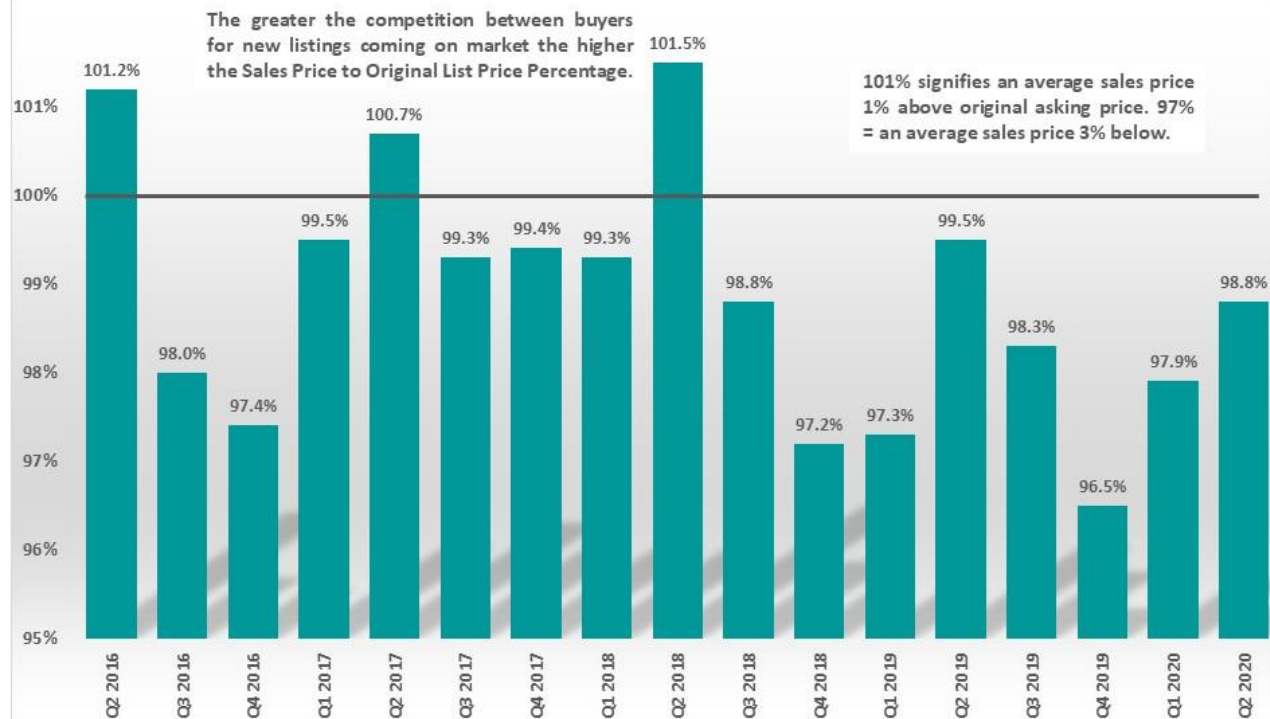


Data from sources deemed reliable but may contain errors  
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## Sales Price to Original List Price % by Quarter Marin County Market Dynamics, 2016 to Present

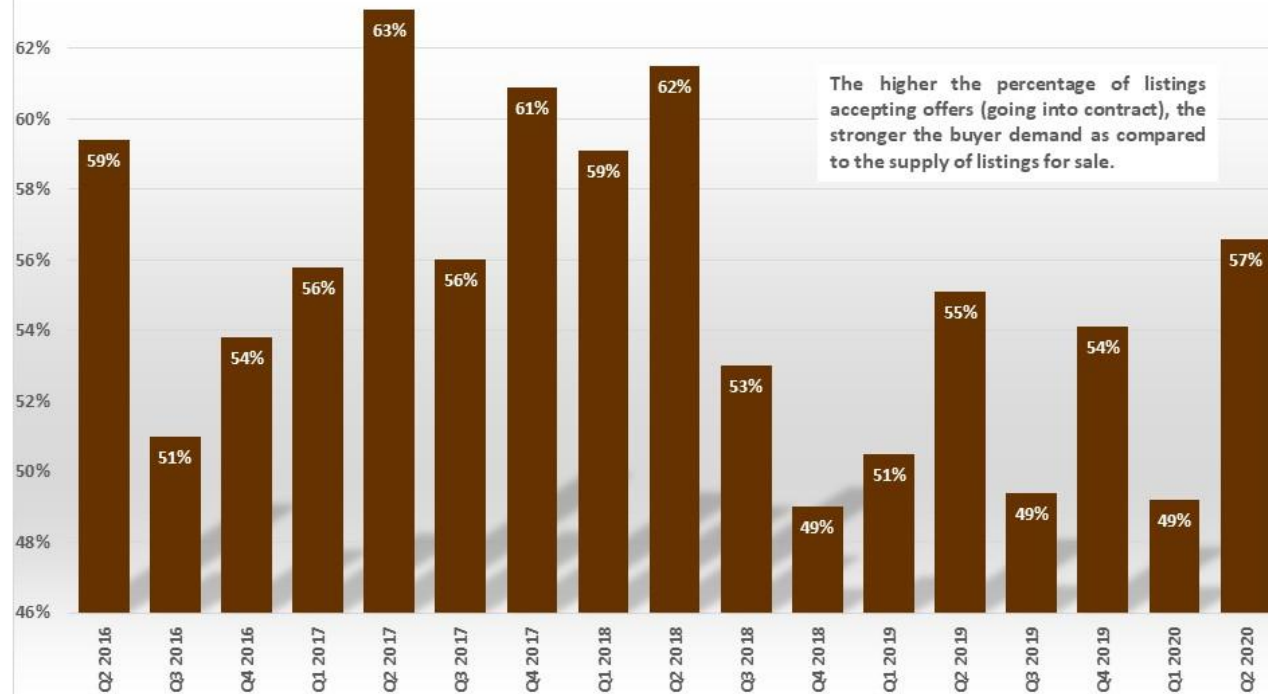
House and condo sales up to \$3 million, as reported to MLS



Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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### Percentage of Listings Accepting Offers by Quarter Marin County Market Dynamics, 2016 to Present



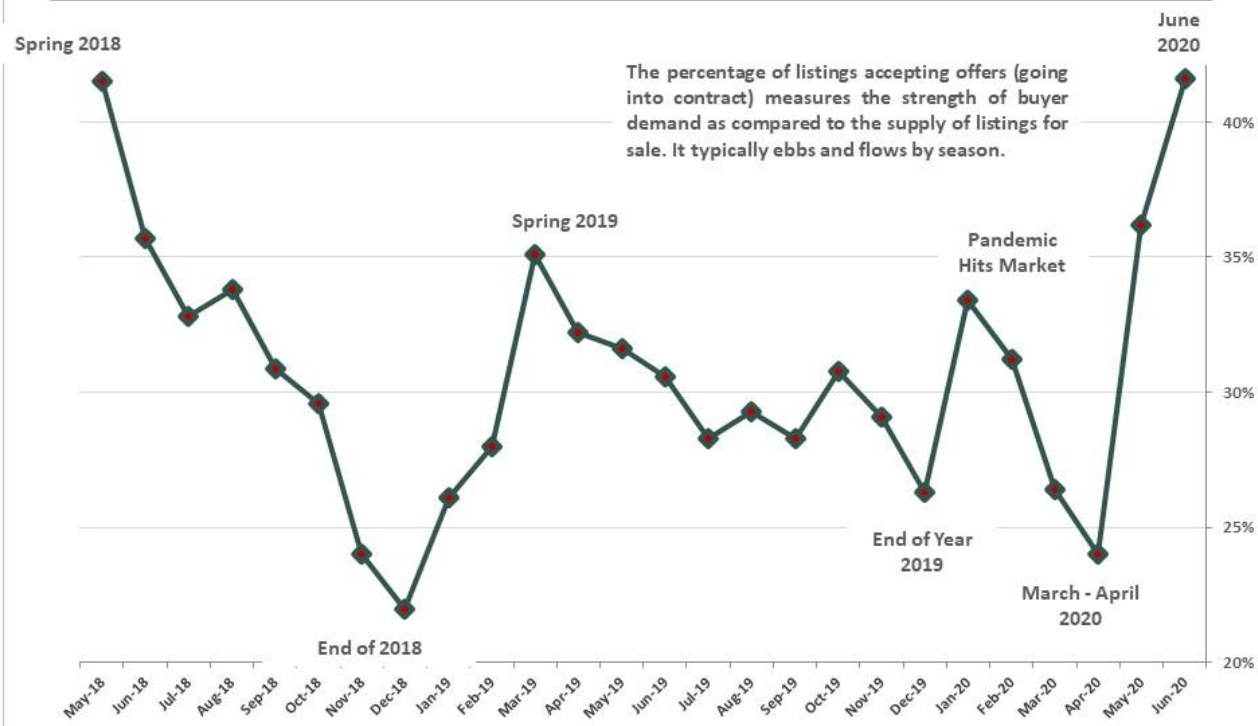
Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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## Percentage of Listings Accepting Offers by Month

Marin County: % of Listings Going into Contract

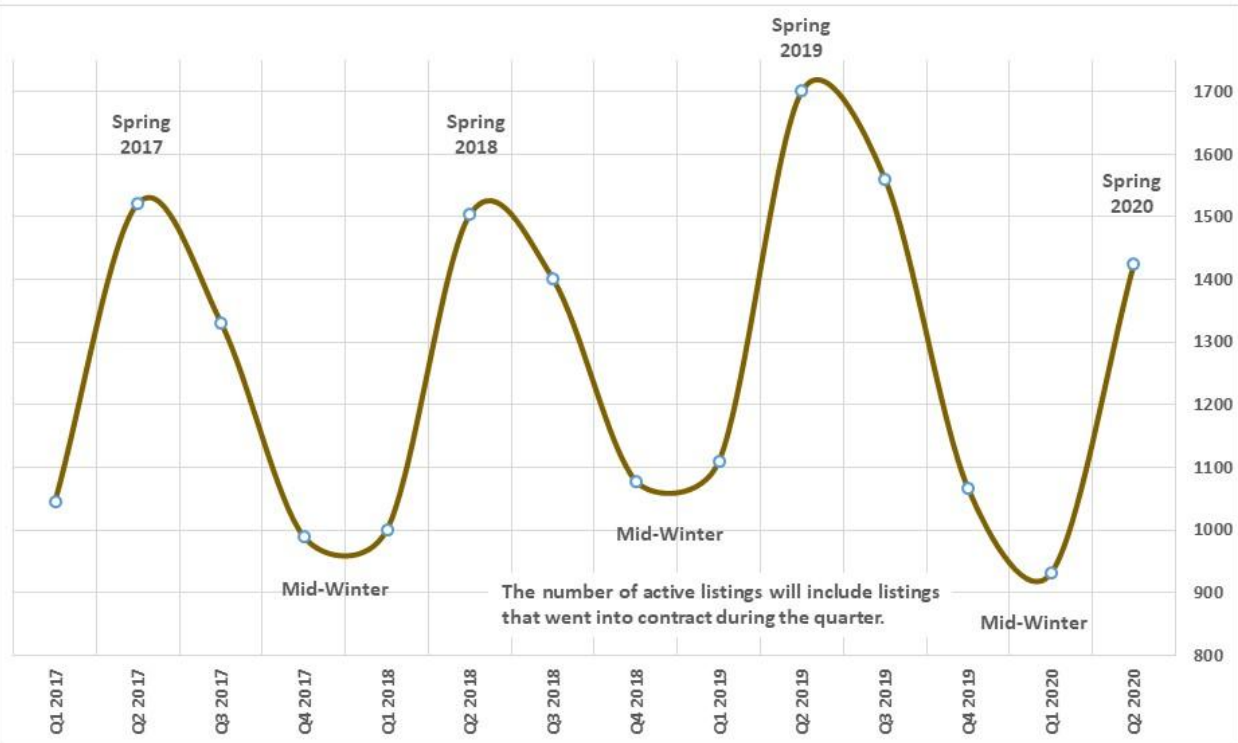


\* MLS reported data, per Broker Metrics. Last month's data is estimated and may change with late reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate.

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## Active Listings on Market in Quarter

### Marin County Market Dynamics & Seasonality



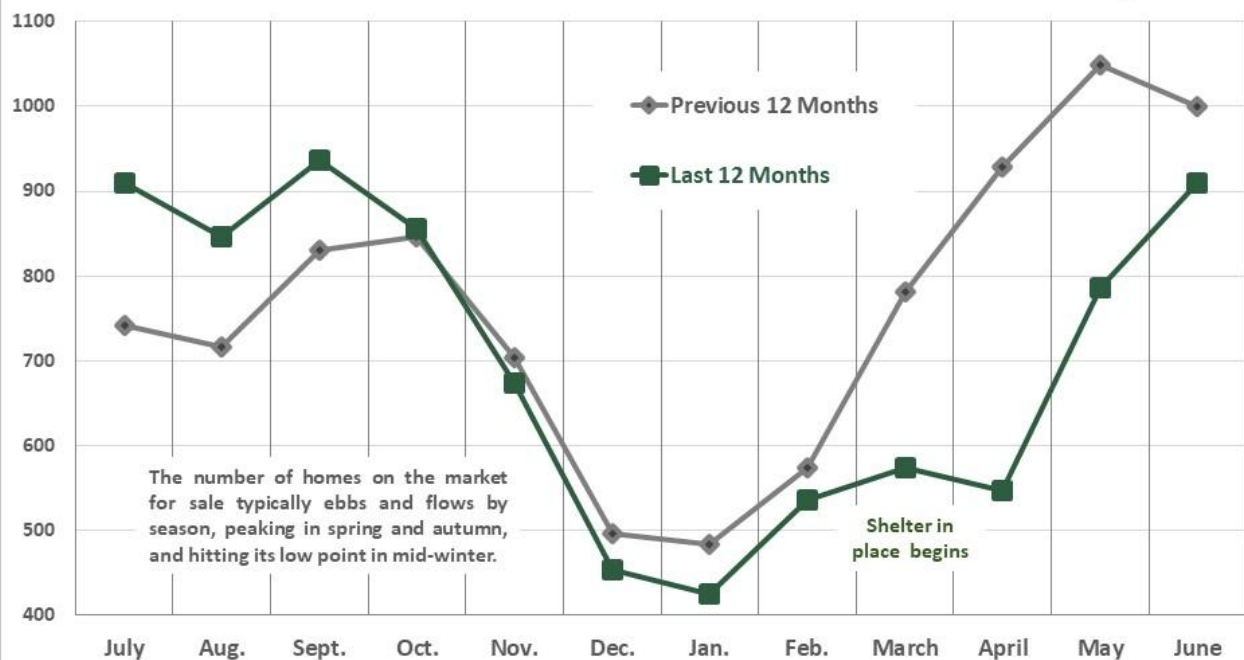
Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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## Active Listings For Sale in Month

### Marin County, 12 Month Year-over-Year Comparison

All numbers and percentages  
to be considered approximate



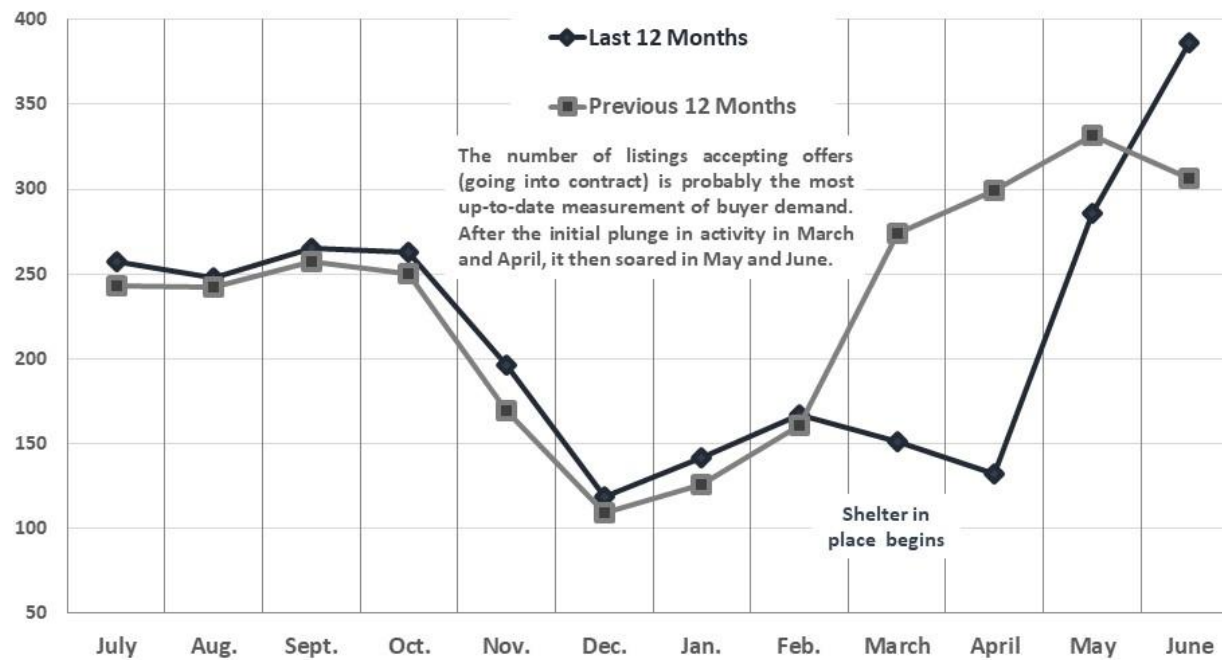
Residential activity reported to MLS, per Broker Metrics. Last month's data estimated based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

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## Listings Accepting Offers (Going into Contract) by Month

Marin County, 12 Month Year-over-Year Comparison

All numbers and percentages  
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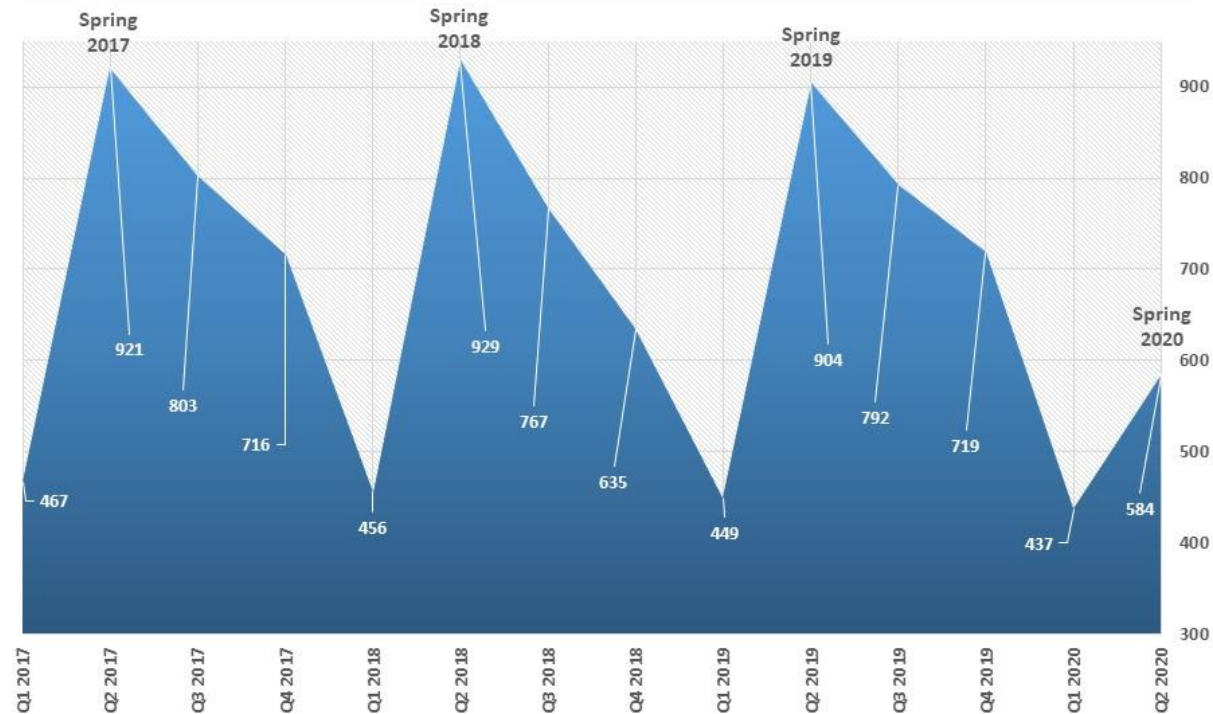
Residential activity reported to MLS, per Broker Metrics. Last month's data estimated based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

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## Sales Volume by Quarter since 2017

### Marin County Market Dynamics & Seasonality

Sales are a lagging indicator, generally reflecting offers accepted 3-6 weeks earlier.



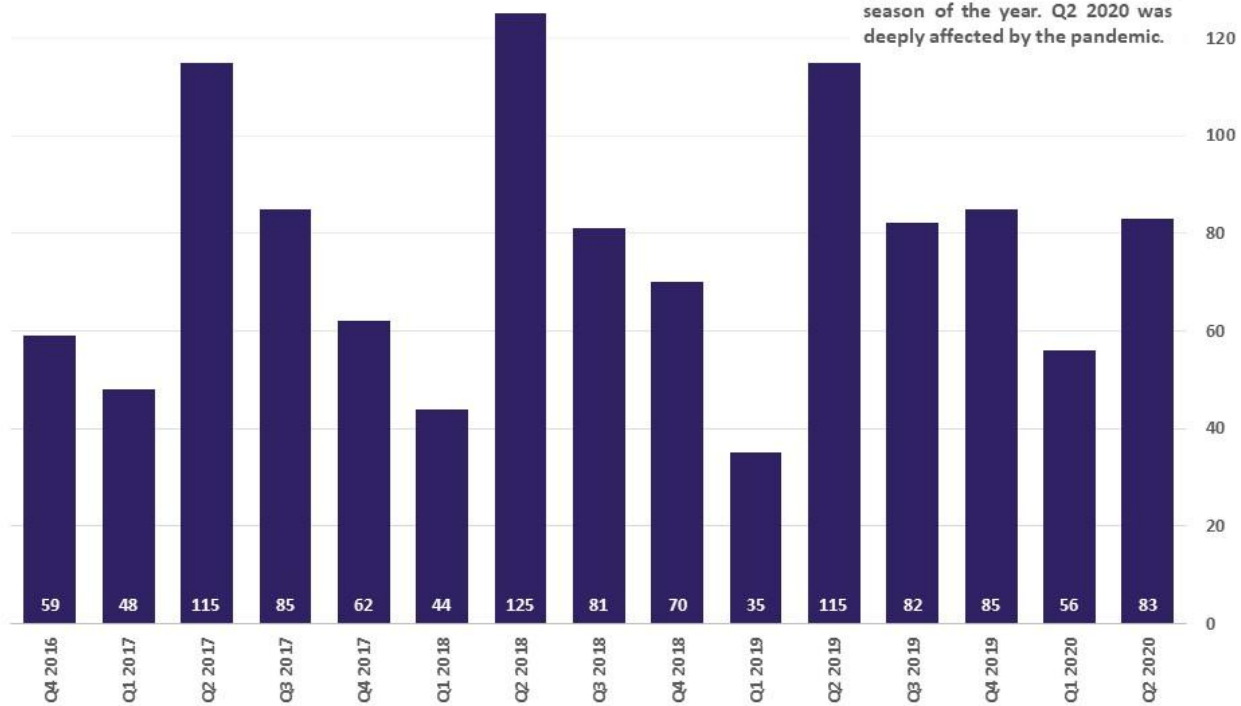
Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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## Marin County Luxury Home Sales

Sales Prices of \$2,500,000 & Above, by Quarter

The market for luxury homes fluctuates by season, with spring (Q2) typically the dominant selling season of the year. Q2 2020 was deeply affected by the pandemic.



Sales reported to MLS, per Broker Metrics. Data from sources deemed reliable, but subject to error and revision. All numbers are approximate.

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## Higher-Price Home Listings Going into Contract by Month

### Marin County Year-over-Year Market Dynamics

After the initial shelter-in-place plunge, Marin County sees huge rebound in the sale of higher-price homes. Comparing market activity in the last 12 months with the 12 months prior.

#### # Listings Accepting Offers

##### Homes Priced \$2 Million – \$2.99 Million



#### # Listings Accepting Offers

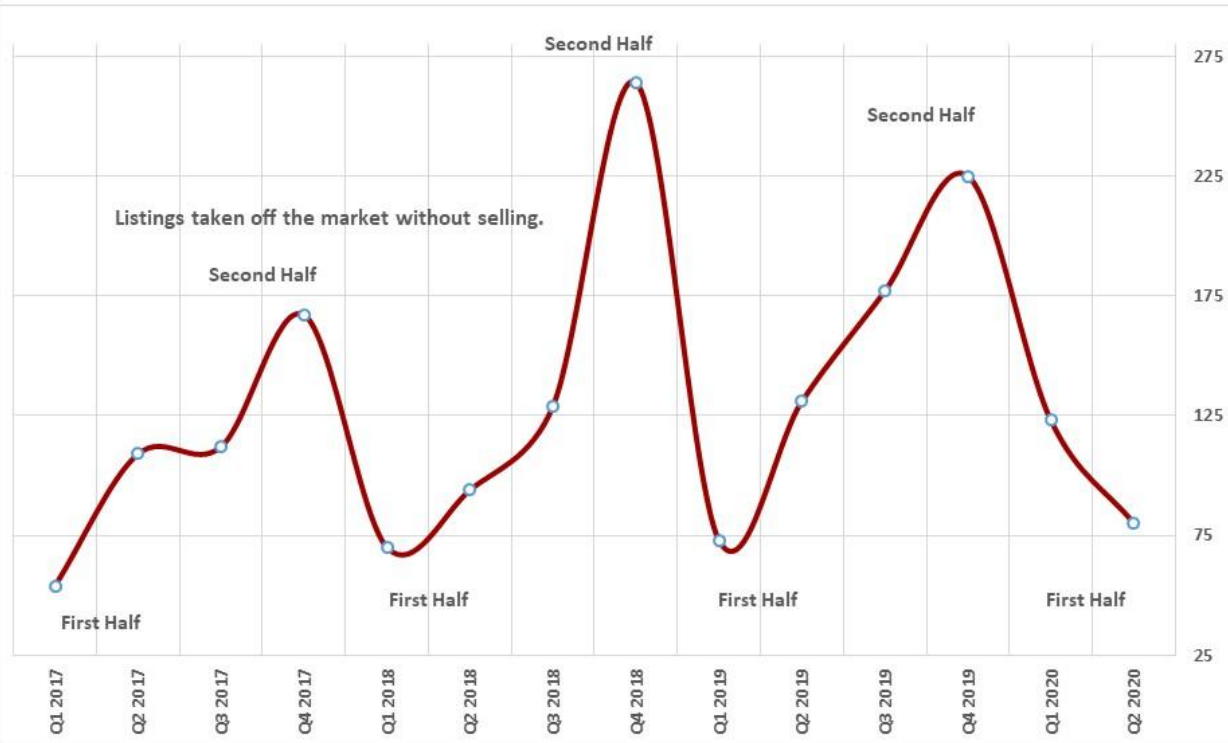
##### Luxury Homes, \$3 Million+



Residential activity reported to MLS, per Broker Metrics. Last month's data estimated based on available numbers, but may change with late-reported activity. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

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## Listings Expired/Withdrawn in Quarter Marin County Market Dynamics & Seasonality



Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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Compass San Francisco Bay Area Reports: <https://www.bayareamarketreports.com/>

**It is impossible to know how median and average value statistics apply to any particular home without a specific comparative market analysis. Many factors affect sales prices besides neighborhood/ bedroom count: quality of location *within* the neighborhood, condition, size, architecture, views, amenities, parking, outdoor space, etc.**

These analyses were made in good faith with data from sources deemed reliable, but may contain errors and are subject to revision. It is not our intent to convince you of a particular position, but to attempt to provide straightforward data and analysis, so you can make your own informed decisions. Median and average statistics are enormous generalities: There are hundreds of different markets in the county and the Bay Area, each with its own unique dynamics. Median prices and average dollar per square foot values can be and often are affected by other factors besides changes in fair market value. Longer term trends are much more meaningful than short-term.

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