



## 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 early Q2 2020 market activity, but a dramatic rebound occurred in the months following.

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

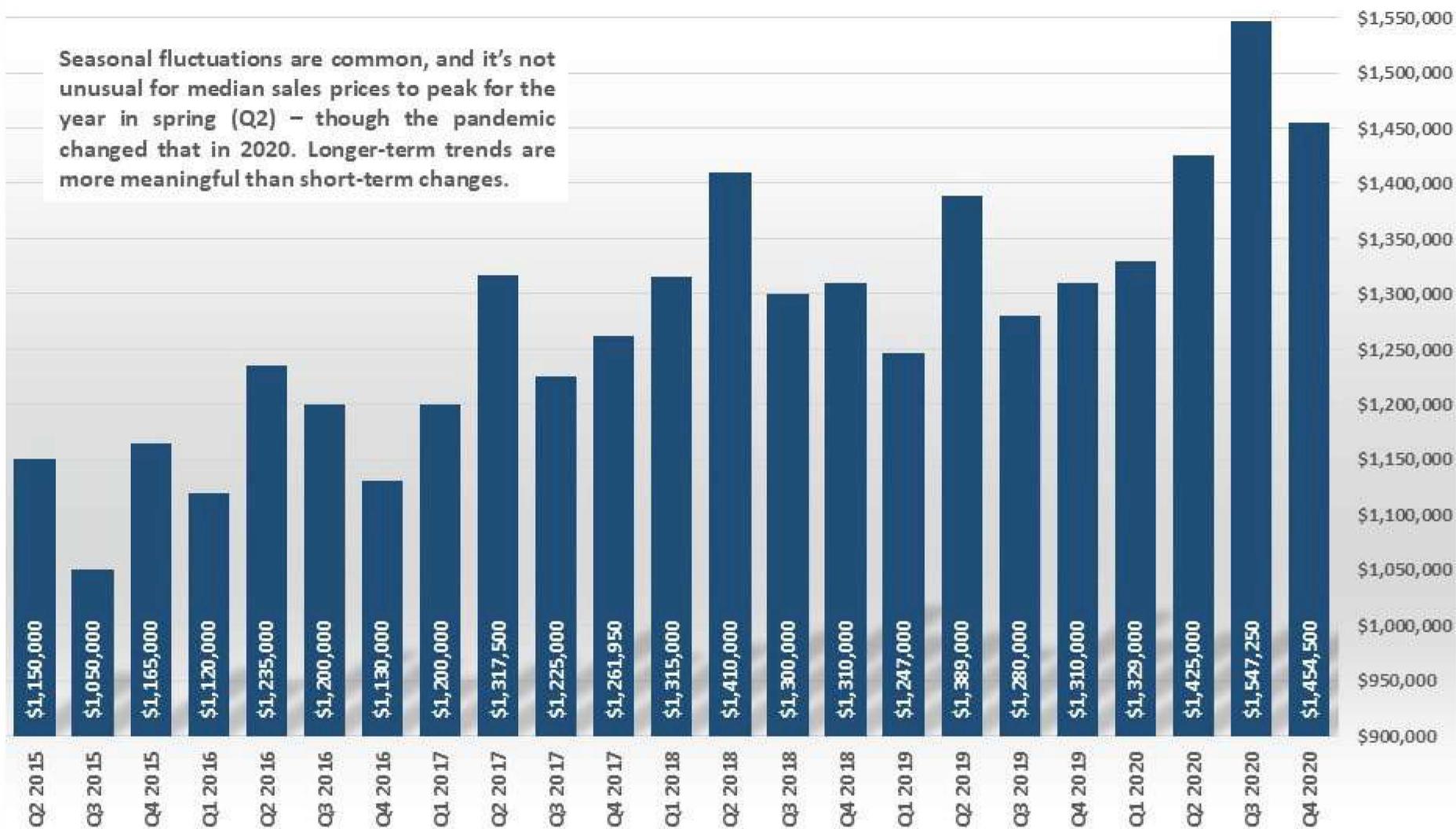
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# Marin County House Price Appreciation

## 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) – though the pandemic changed that in 2020. Longer-term trends are more meaningful than short-term changes.

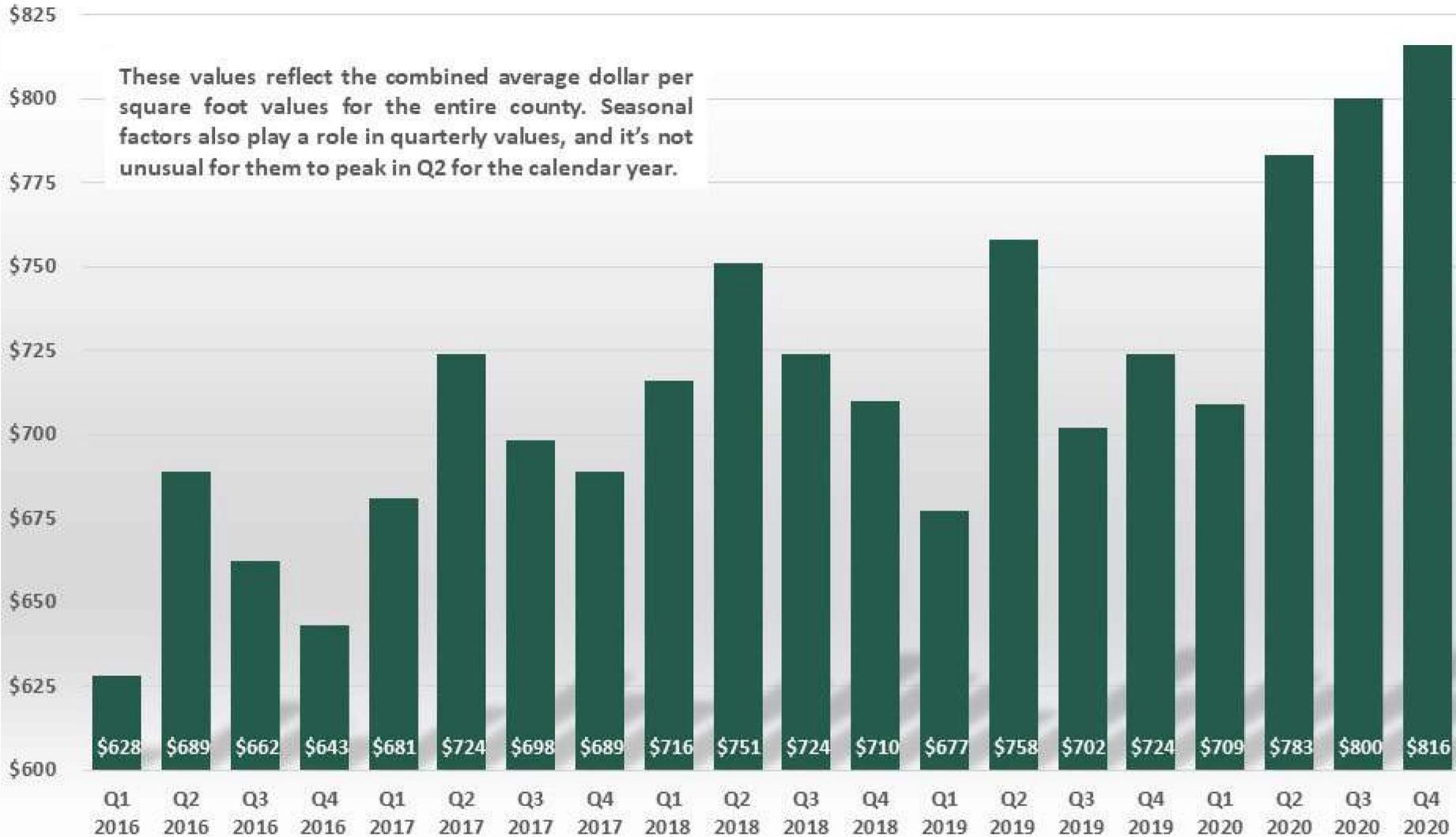


Median sales price is that price at which half the sales occurred for more and half for less. It is a very general statistic that can be affected by other factors besides changes in fair market value. All numbers are approximate and subject to revision.

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# Marin County House Values

## Average Dollar per Square Foot Values, by Quarter



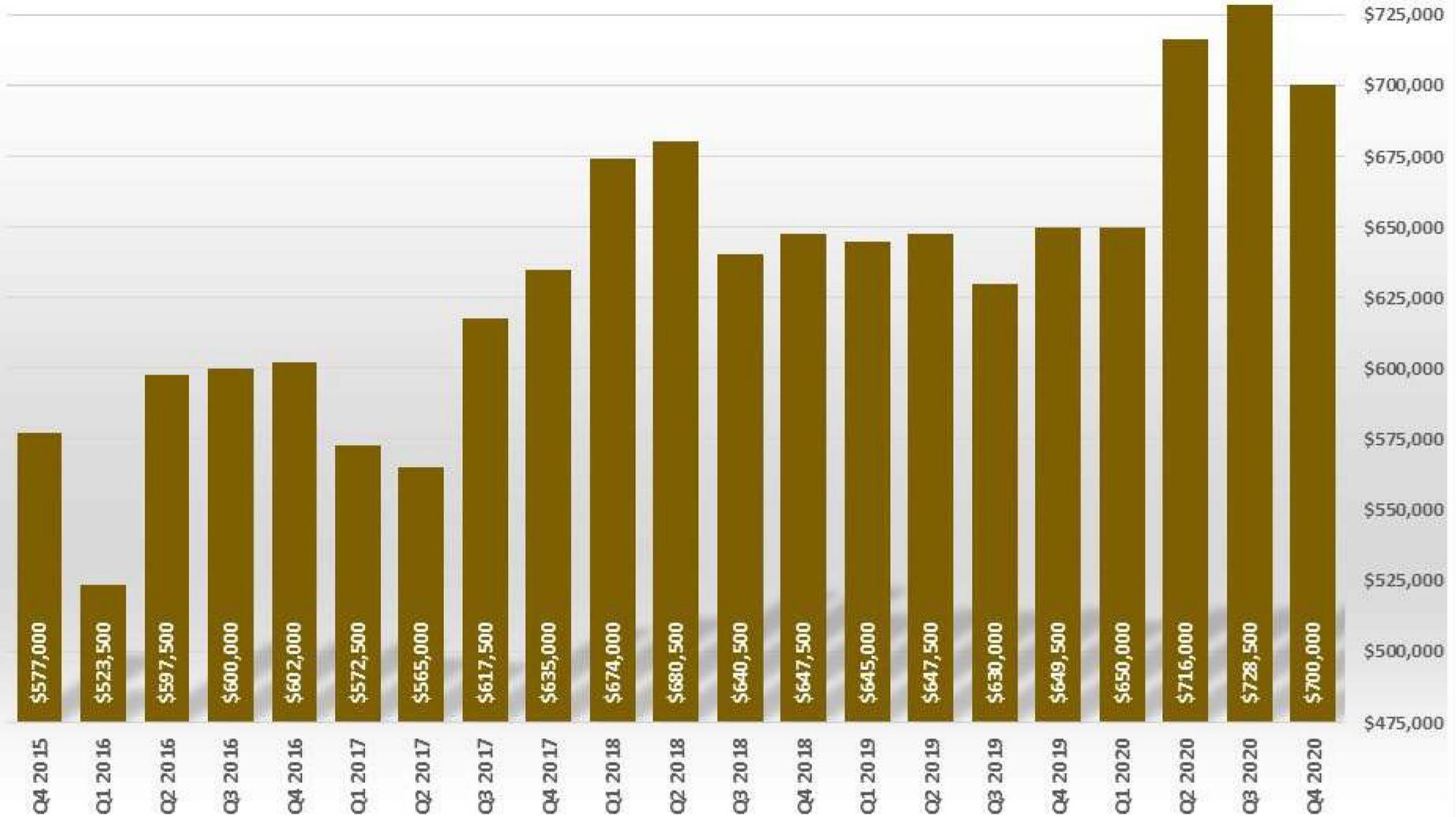
MLS house sales data per Broker Metrics: deemed reliable but may contain errors and is subject to revision. All numbers approximate.

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# Marin County Condo Prices by Quarter

## Median Condo Sales Prices

As reported to MLS,  
per Broker Metrics

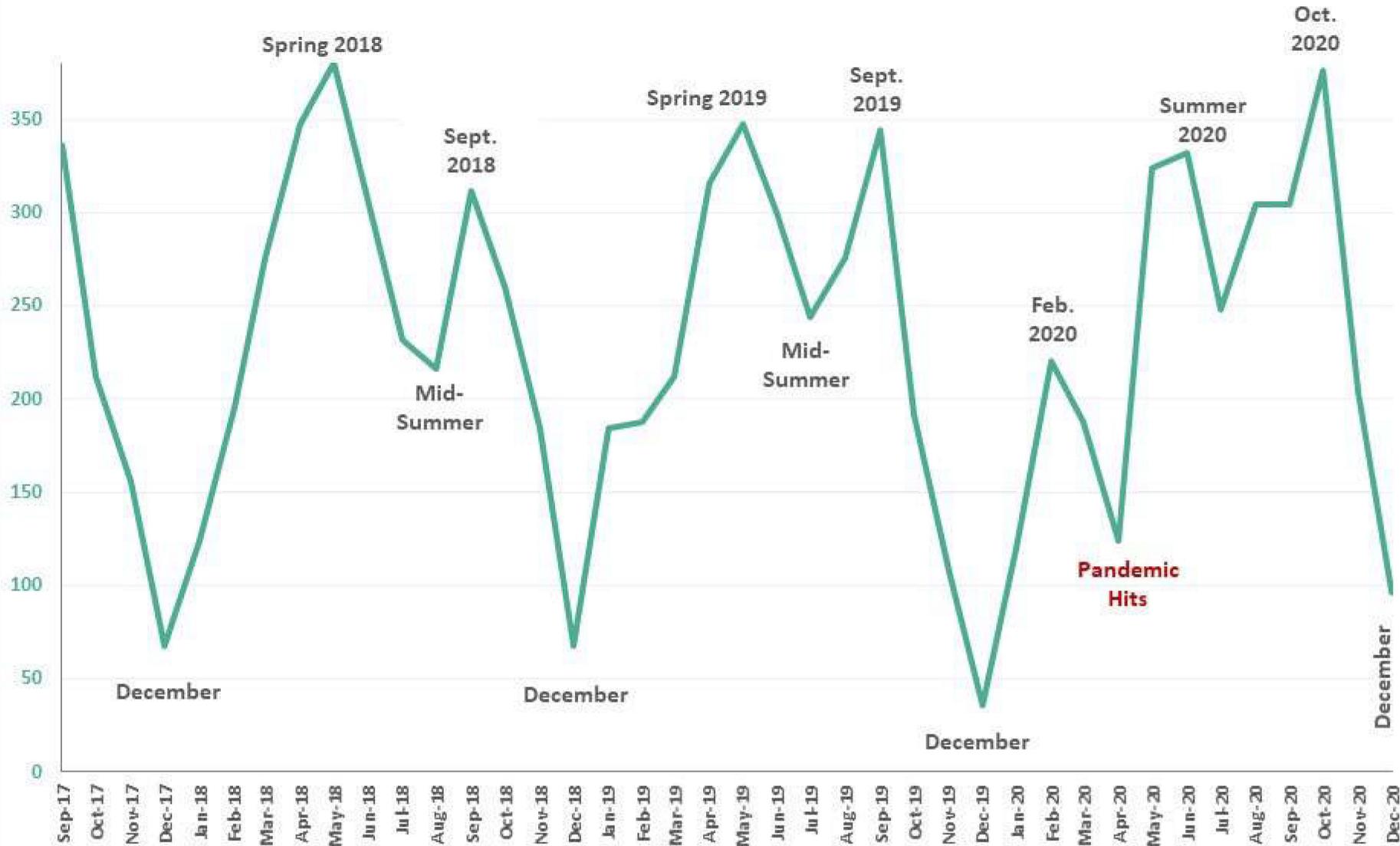


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# New Listings Coming on Market

## Marin County Market Dynamics & Seasonality by Month



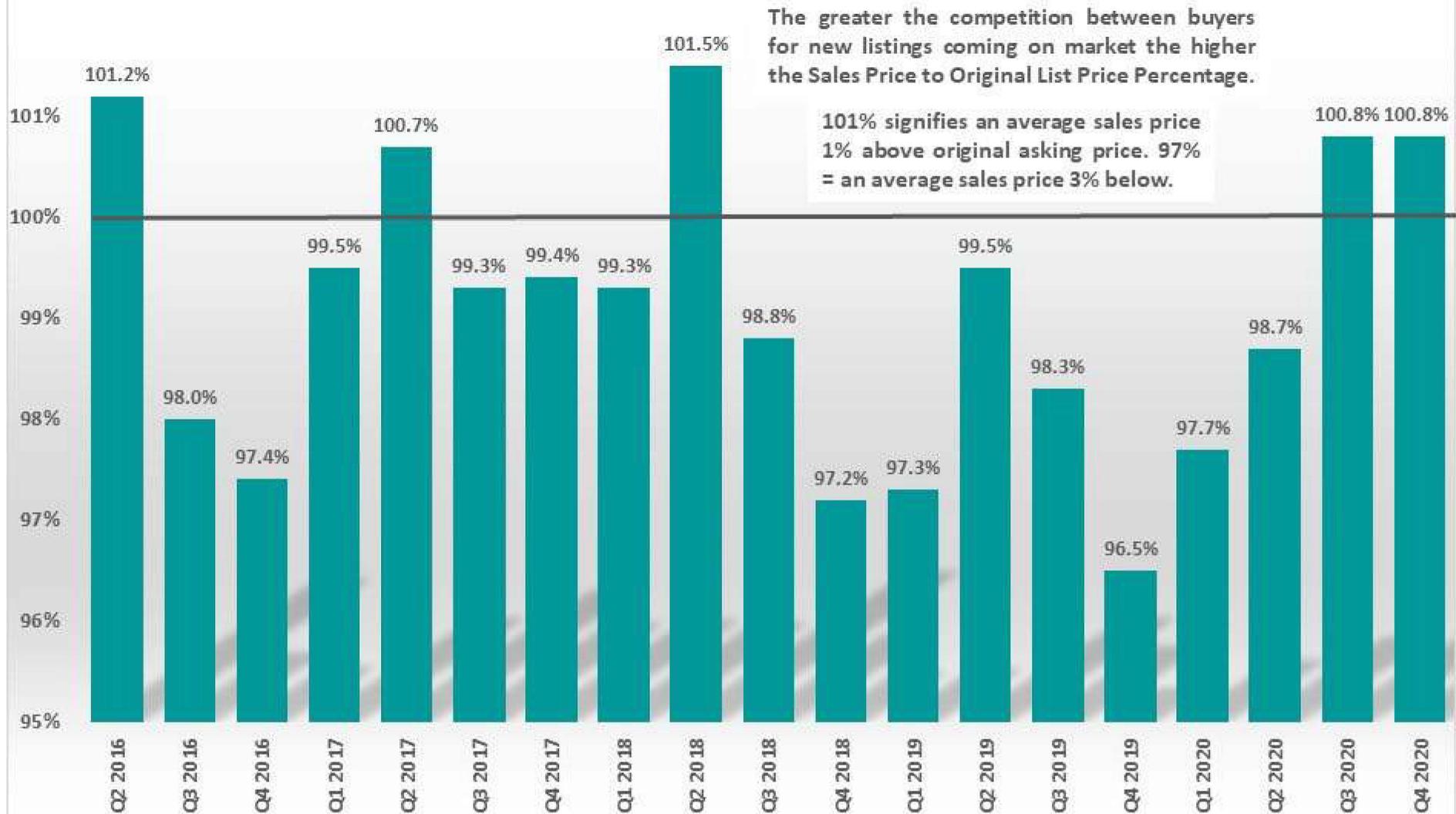
Per Realtor.com Research: <https://www.realtor.com/research/data/>, listings posted on site. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers should be considered approximate.

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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. Last reading may change with late-reported activity.

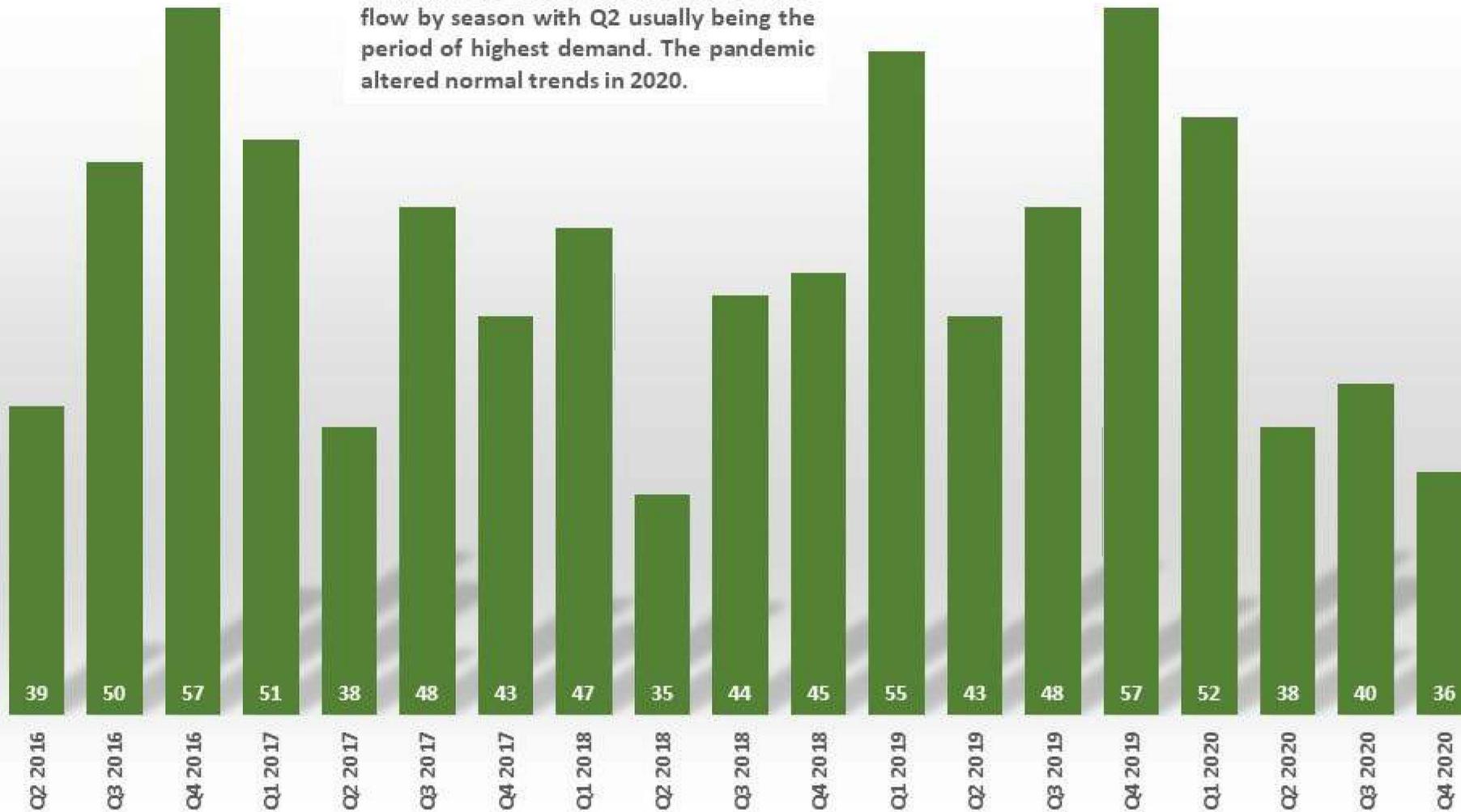
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## Average Days on Market by Quarter

### Marin County Market Dynamics, 2016 to Present

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

Average days on market typically ebb and flow by season with Q2 usually being the period of highest demand. The pandemic altered normal trends in 2020.

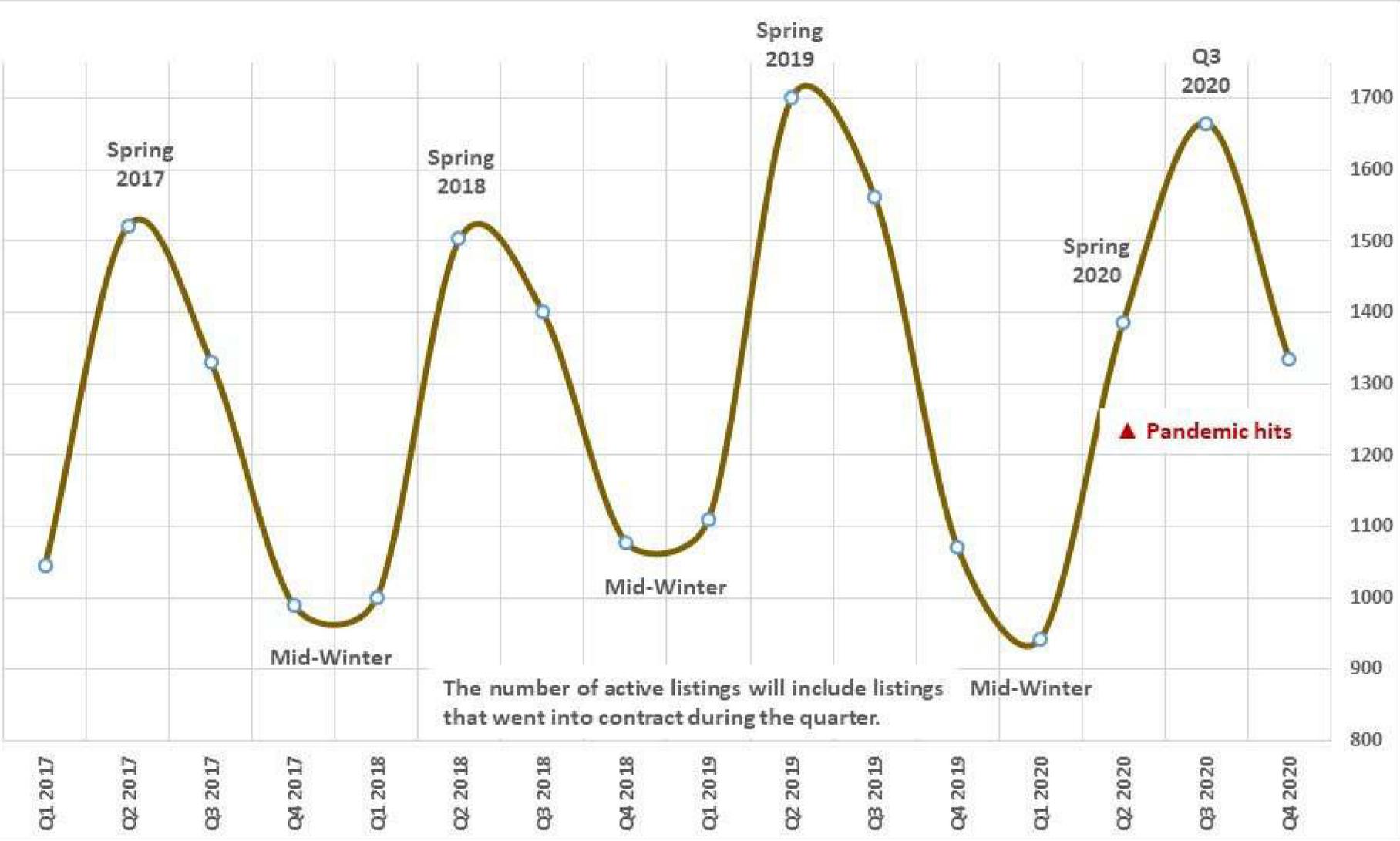


Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate. Last reading may change with late-reported activity.

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# Active Listings on Market in Quarter

## Marin County Market Dynamics & Seasonality



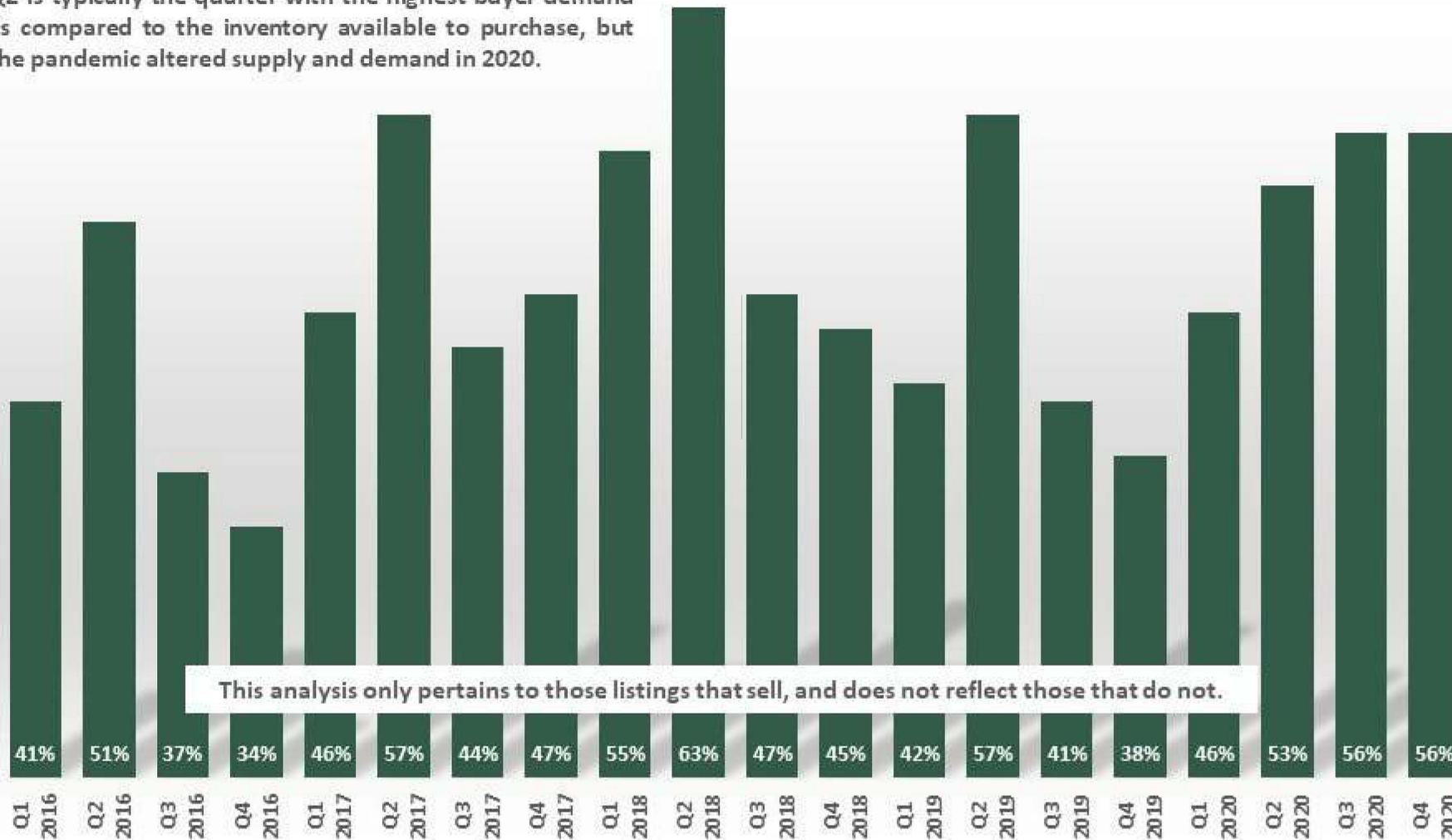
Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

# 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, but the pandemic altered supply and demand in 2020.



This analysis only pertains to those listings that sell, and does not reflect those that do not.

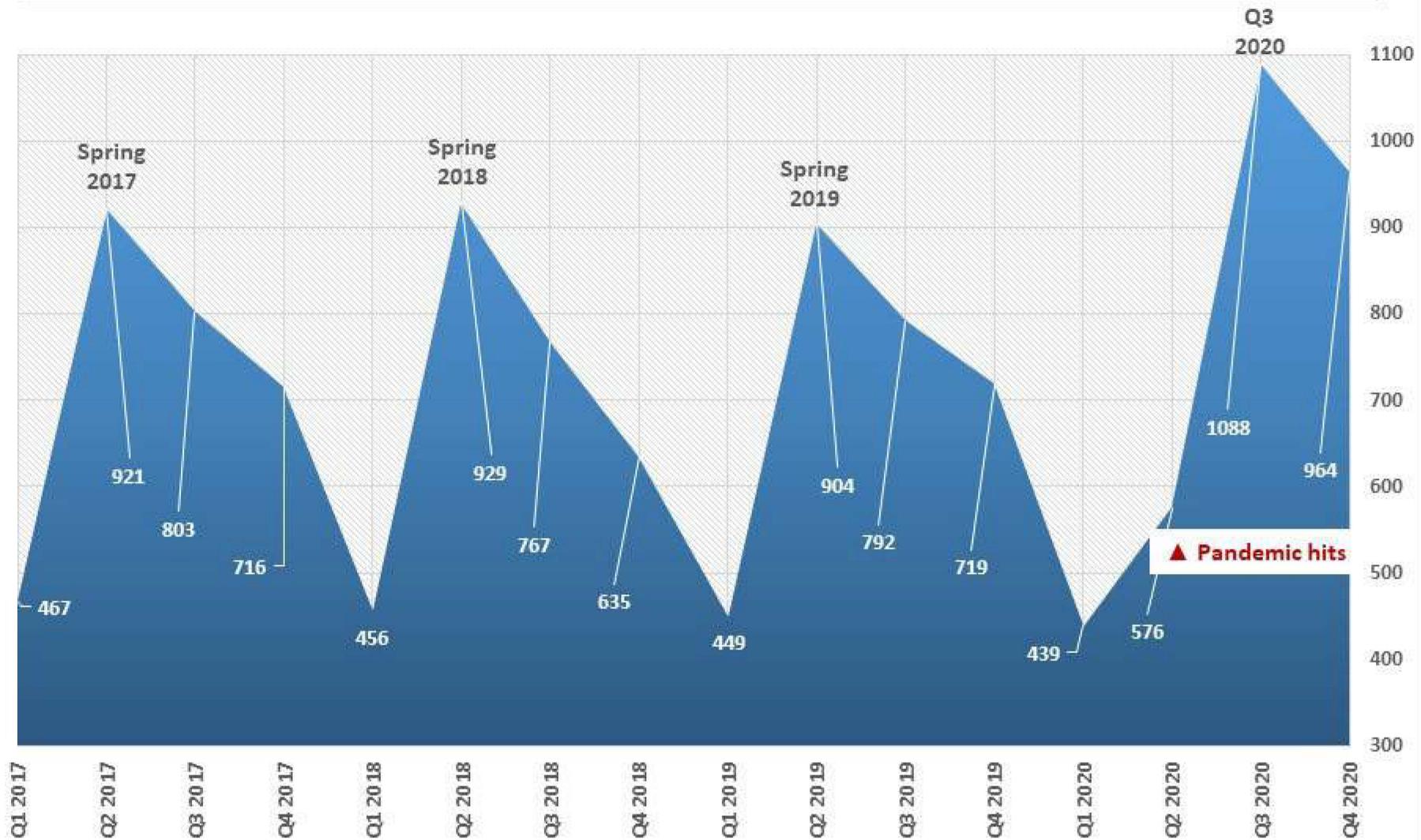
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# Sales Volume by Quarter since 2017

## Marin County Market Dynamics & Seasonality

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

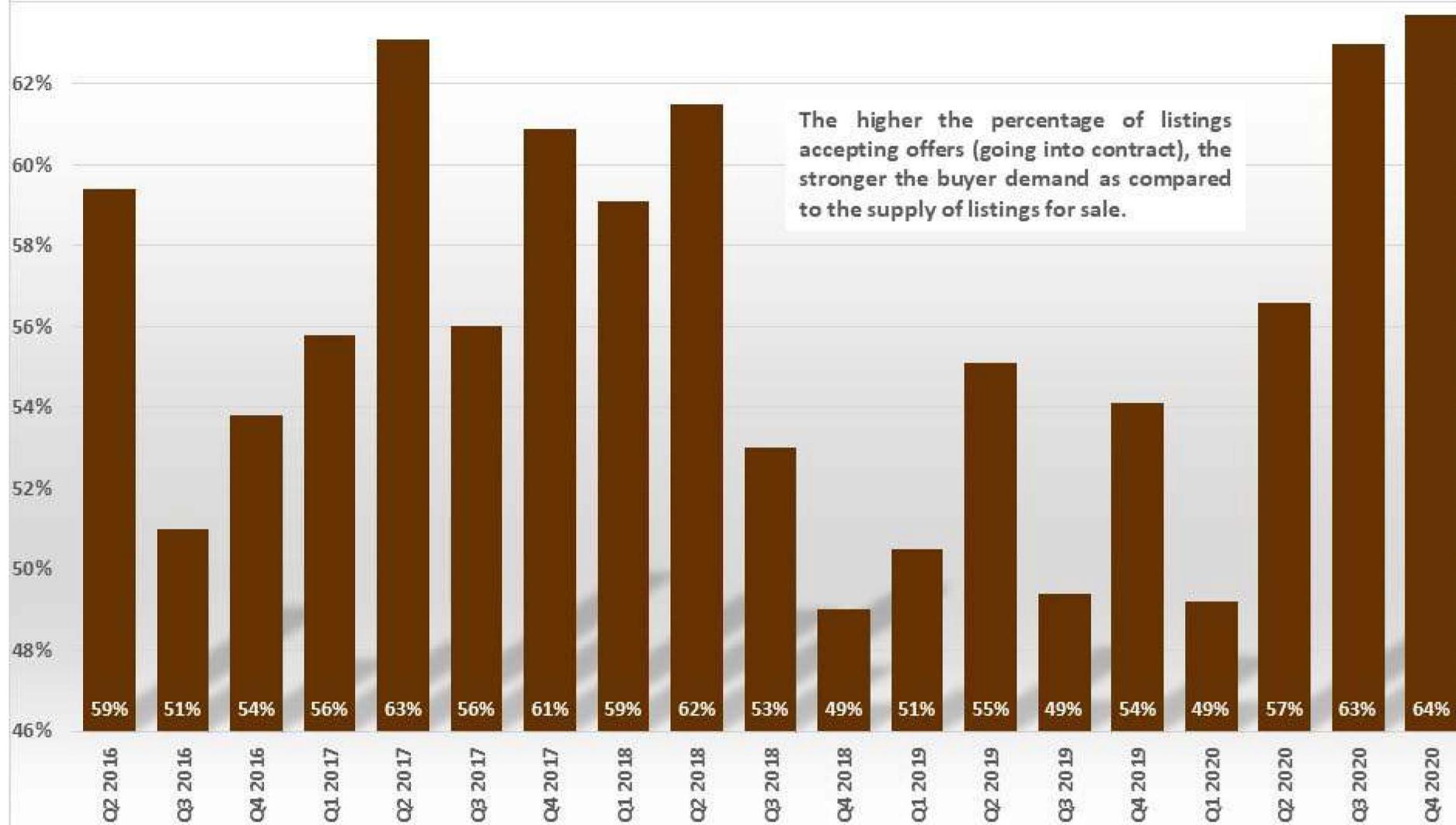


Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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## Percentage of Listings Accepting Offers by Quarter

### Marin County Market Dynamics, 2016 to Present



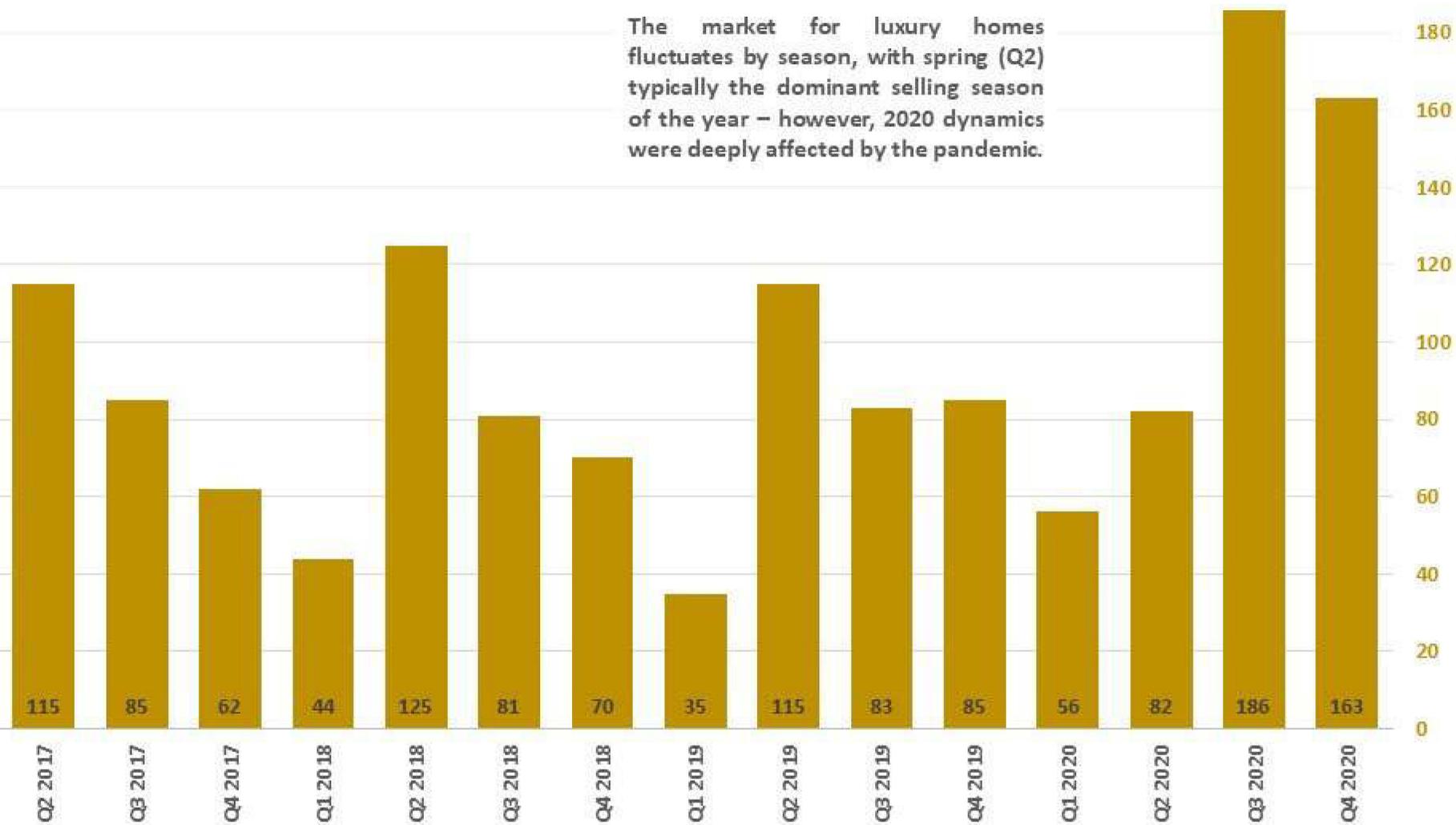
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## Marin County Luxury Home Sales

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 – however, 2020 dynamics were deeply affected by the pandemic.



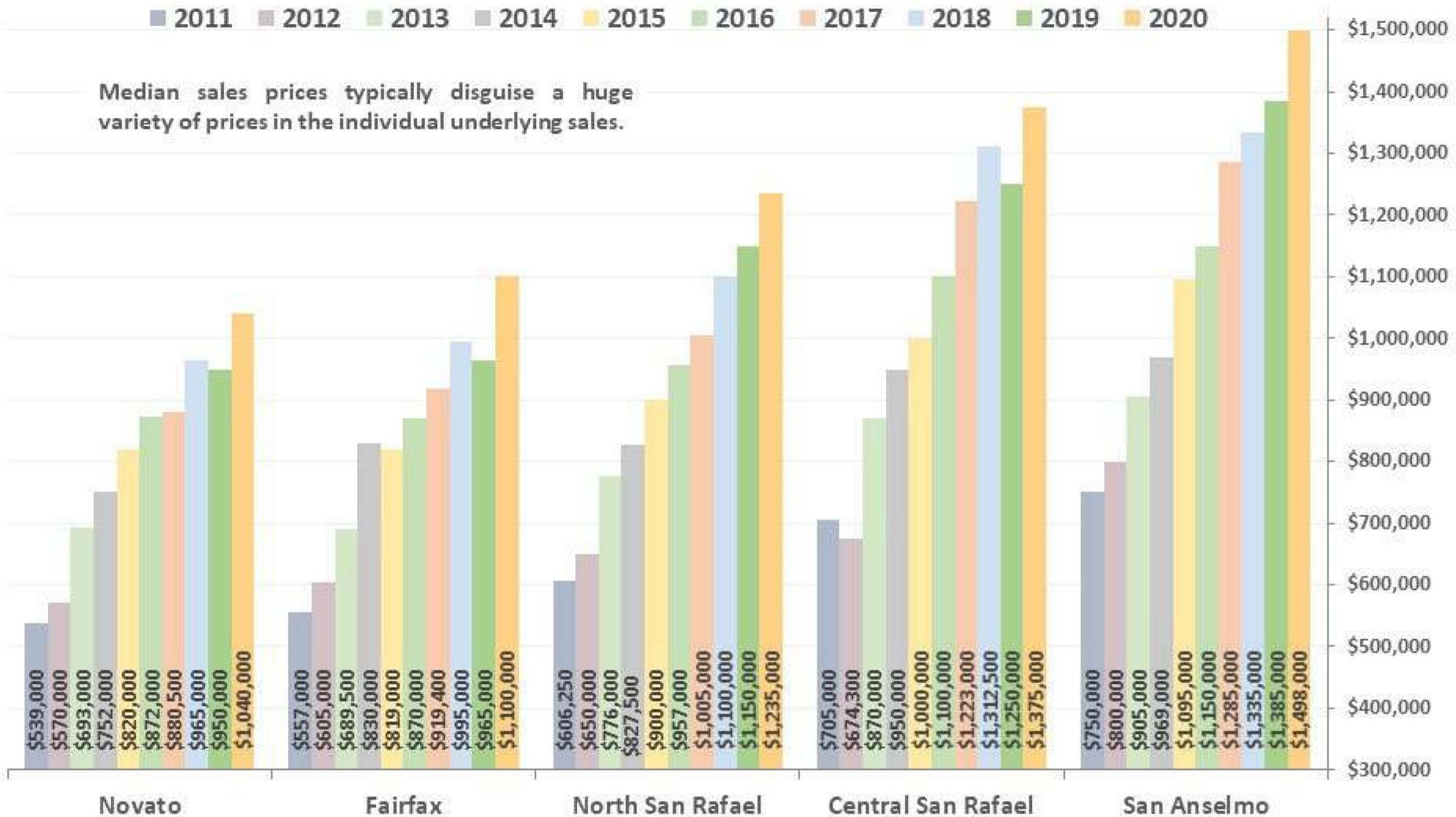
Sales reported to MLS, per Broker Metrics. Data from sources deemed reliable, but subject to error and revision. All numbers are approximate.

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# Marin County Home Price Trends – Selected Cities

## Median House Sales Price Trends since 2011

Sales reported to MLS

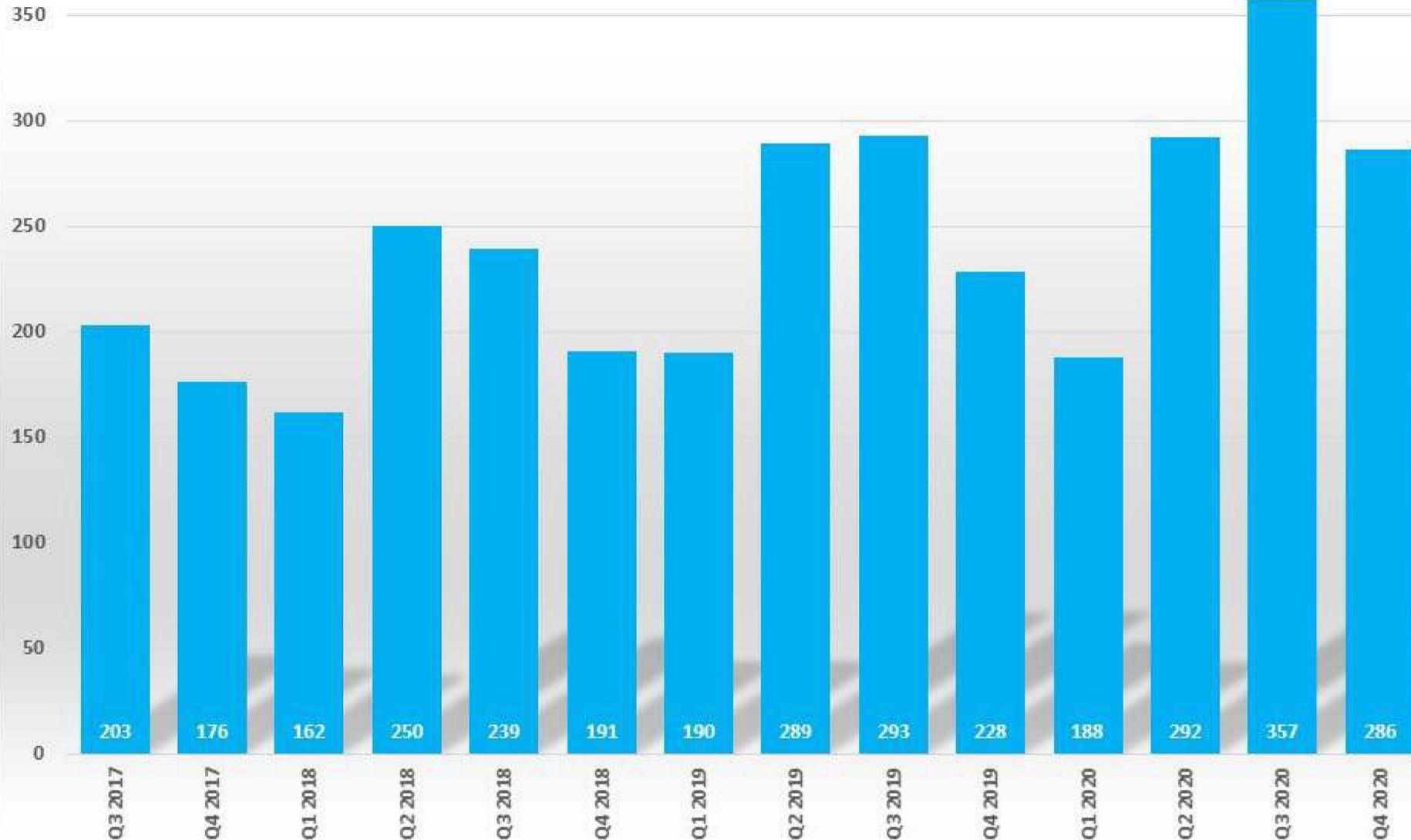


Median sales price is that price at which half the sales occurred for more and half for less. It is a very general statistic often affected by factors other than changes in fair market value. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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# Luxury Home Listings on Market

Marin County – Active Listings, \$2.5 Million +, by Quarter



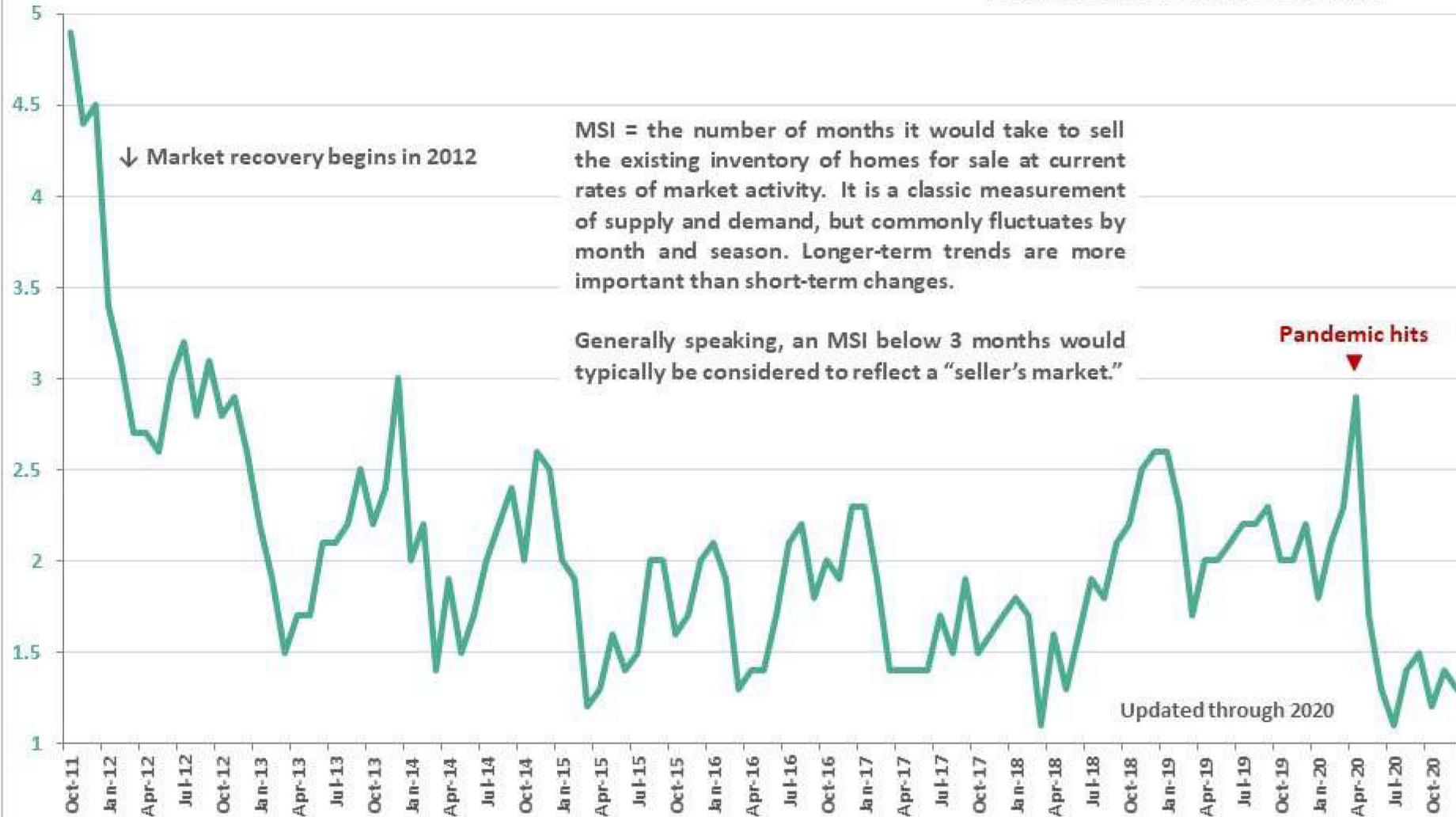
For sold listings reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.

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# Months Supply of Inventory (MSI)

## Marin County Real Estate Market since 2011

Based upon accepted offer activity for Marin houses and condos in MLS per Broker Metrics



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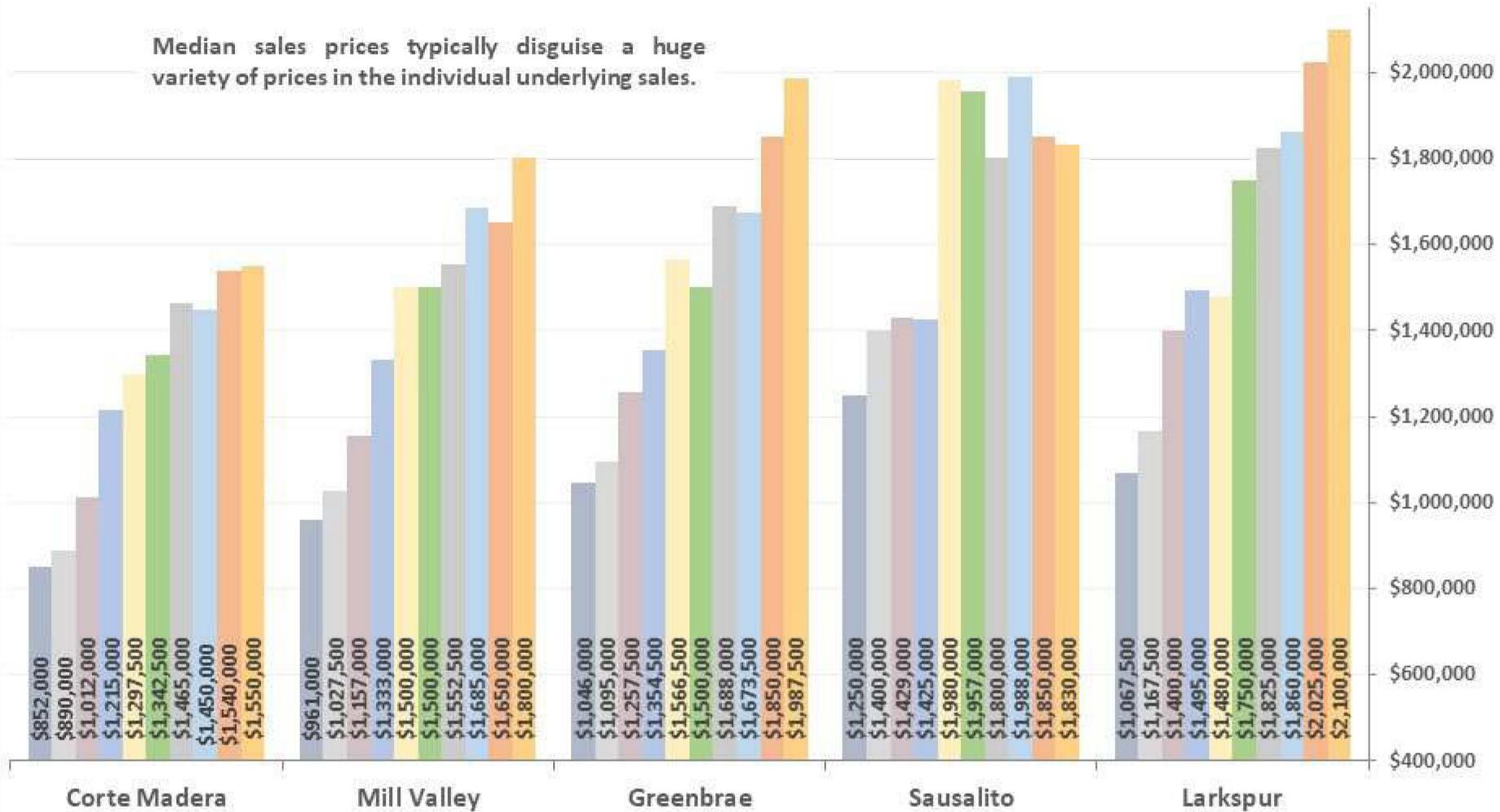
# Marin County Home Price Trends – Selected Cities

## Median House Sales Price Trends since 2011

Sales reported to MLS

■ 2011 ■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020

Median sales prices typically disguise a huge variety of prices in the individual underlying sales.

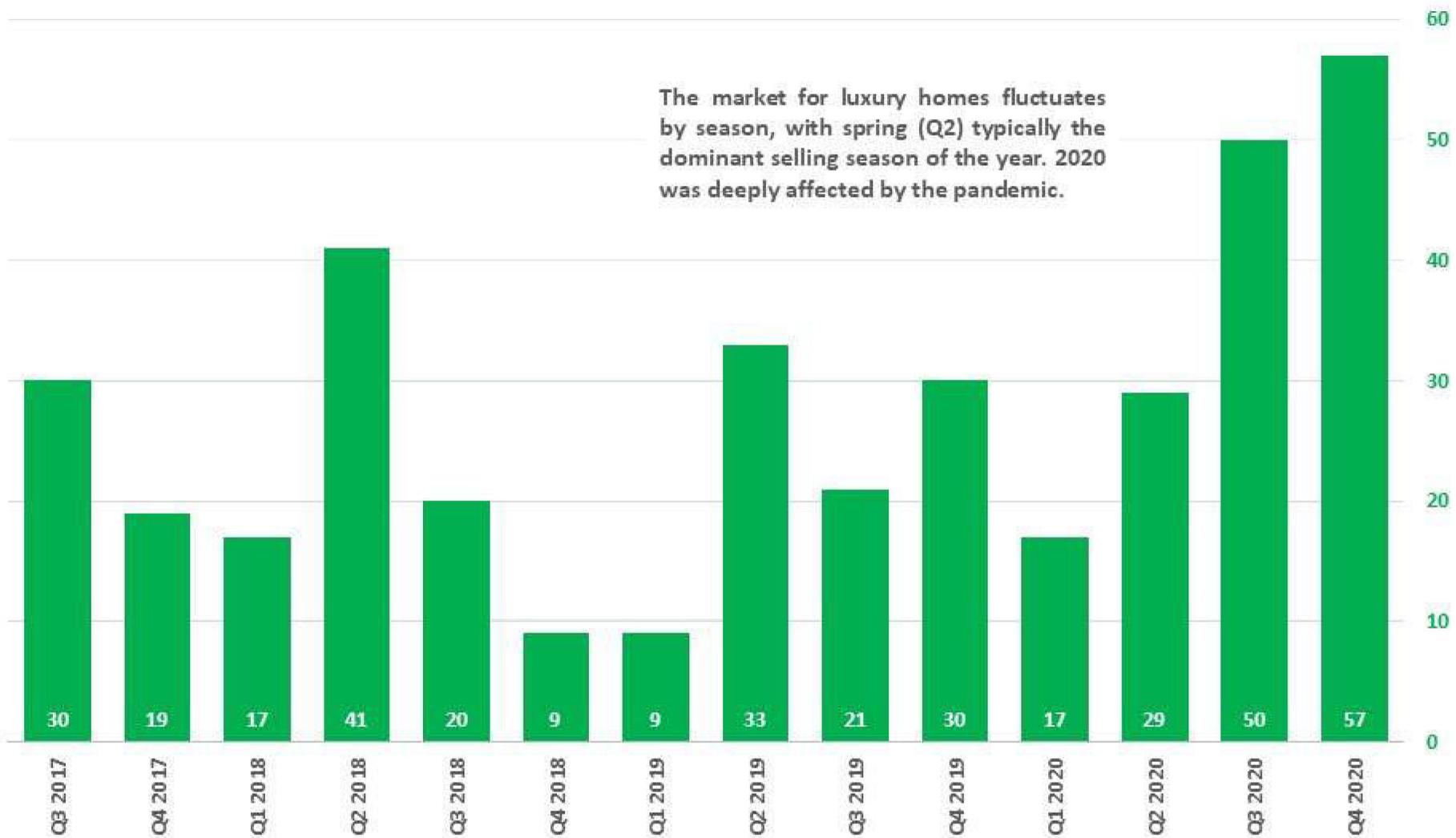


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## Marin County Luxury Home Sales

Sales Prices of \$4,000,000 & Above, by Quarter

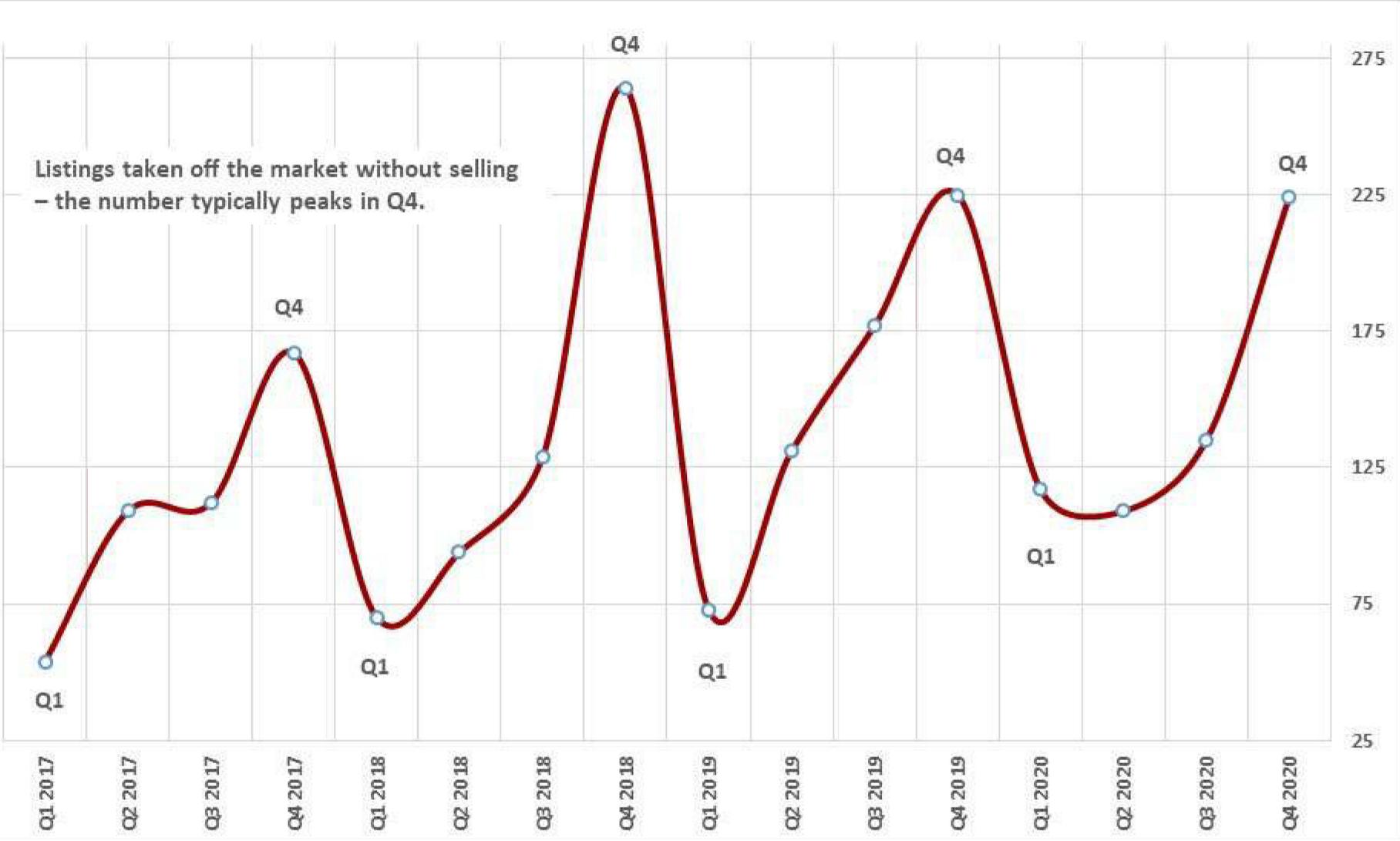


Sales reported to MLS, per Broker Metrics. Data from sources deemed reliable, but subject to error and revision. All numbers are approximate.

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# Listings Expired/Withdrawn in Quarter

## Marin County Market Dynamics & Seasonality



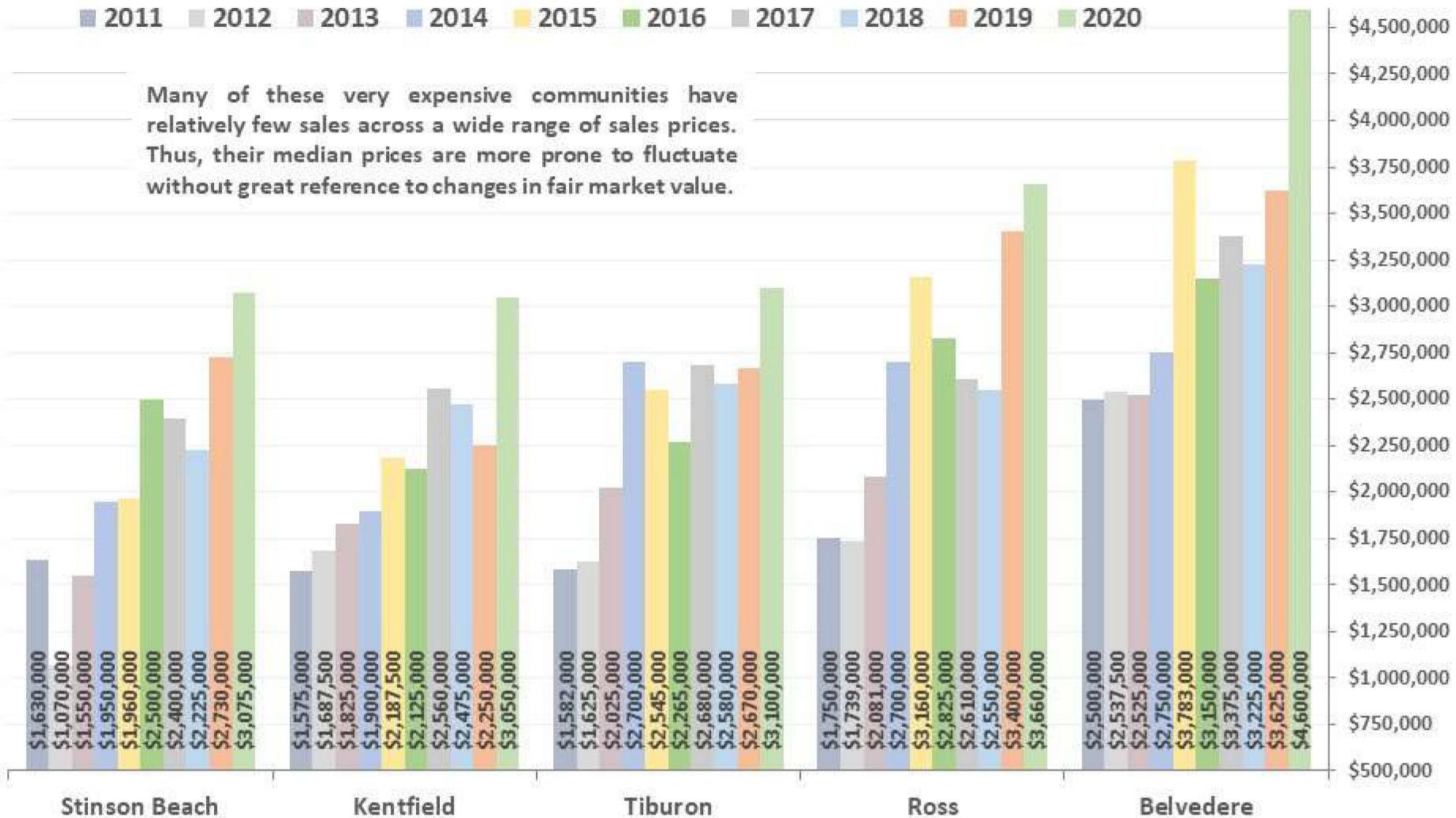
Residential market activity reported to MLS, per Broker Metrics. Data from sources deemed reliable, but may contain errors and subject to revision. All numbers are approximate.



# Marin County Home Price Trends – Selected Cities

## Median House Sales Price Trends since 2011

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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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# Marin HOUSE Market Snapshot

Statistics by City, Q4 2020

Over 100% =  
overbidding

Lower days =  
faster selling

Higher % =  
higher demand

More expensive markets often,  
but not always, have softer  
supply & demand dynamics.

| City or Region<br>in alphabetical order | Q4 Median<br>Sales Price | Sales Price to<br>Orig. List Price % | Average Days on<br>Market | % of Listings<br>Accepting Offers | Number of Sales<br>in Quarter | # Active Listings<br>in Quarter |
|---|--------------------------|--------------------------------------|---------------------------|-----------------------------------|-------------------------------|---------------------------------|
| Belvedere                               | \$5,757,000              | 95% of list price                    | 24 days                   | 36%                               | 15 sales                      | 31 active listings              |
| Corte Madera                            | \$1,600,000              | 102%                                 | 26                        | 83%                               | 37                            | 40                              |
| Fairfax                                 | \$1,164,000              | 105%                                 | 29                        | 78%                               | 28                            | 29                              |
| Greenbrae                               | \$2,125,000              | 101%                                 | 18                        | 71%                               | 12                            | 17                              |
| Kentfield                               | \$3,262,500              | 100%                                 | 22                        | 67%                               | 24                            | 24                              |
| Larkspur                                | \$1,910,000              | 98%                                  | 33                        | 67%                               | 29                            | 39                              |
| Mill Valley                             | \$1,800,000              | 99%                                  | 33                        | 66%                               | 116                           | 157                             |
| Novato                                  | \$1,050,000              | 100%                                 | 35                        | 76%                               | 169                           | 186                             |
| Ross                                    | \$5,250,000              | 97%                                  | 38                        | 50%                               | 10                            | 20                              |

The same listing can be active, go into contract and sell in *different* quarters. Pertaining to homes listed and/or sold, as reported to MLS in Q4 2020, per Broker Metrics. Data derived from sources deemed reliable, but may contain errors and subject to revision. All numbers to be considered approximate. Note that the percentage of listings *accepting offers* within the quarter is different from the percentage of listings *closing sale* in the quarter. Adjusted for outlier data when identified.

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| City or Region             | Q4 Median Sales Price | Sales Price to Orig. List Price % | Average Days on Market | % of Listings Accepting Offers   | Number of Sales in Quarter | # Active Listings in Quarter |
|----------------------------|-----------------------|-----------------------------------|------------------------|----------------------------------|----------------------------|------------------------------|
| San Anselmo                | \$1,550,000           | 102% of list price                | 22 days on market      | 80% of listings accepting offers | 67 sales                   | 76 active listings           |
| San Geronimo               | \$1,018,000           | 98%                               | 29                     | 73%                              | 17                         | 26                           |
| San Rafael – Central 94901 | \$1,390,000           | 101%                              | 28                     | 67%                              | 90                         | 115                          |
| San Rafael – North 94903   | \$1,267,500           | 103%                              | 30                     | 88%                              | 78                         | 75                           |
| Sausalito                  | \$2,025,000           | 90%                               | 70                     | 44%                              | 12                         | 39                           |
| Stinson Beach              | \$3,350,000           | 97%                               | 56                     | 88%                              | 9                          | 8                            |
| Tiburon                    | \$3,088,888           | 94%                               | 75                     | 43%                              | 45                         | 84                           |
|                            |                       |                                   |                        |                                  |                            |                              |
| Marin County CONDO         | \$699,500             | 99%                               | 49                     | 57%                              | 174                        | 298                          |

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