



Q1 2019

Bay Area

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# Market Update



# Bay Area Market Update

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A MESSAGE FROM

## Jeffrey Gibson

*San Francisco Brokerage Manager*

In contrast to the exceptionally rapid start of the real estate season in 2018, according to the San Francisco Multiple Listing Service, the first quarter of 2019 opened at a relatively modest and more typical pace, with indicators across many San Francisco districts flat or mixed. Nonetheless, luxury sales remained strong, as a number of prominent listings fetched more than \$10 million both on- and off-market, including several eight-figure transactions handled by the San Francisco brokerage of Sotheby's International Realty.

Overall, in San Francisco county, median sale price declined slightly to \$1.53 million, down from \$1.61 million in Q1 2018. Continuing a longstanding pattern, the number of sales fell slightly, down 6% for single-family homes and a notable 18% for condominiums. Despite the continuing constrained supply, median prices declined in several key districts, especially for single-family homes: by 7% in District 1, 14% in District 4, and 15% in District 9. Days on market increased 24% overall, while the ratio of final sale price to last asking price remained relatively consistent year-over-year, with District 2 again leading the city at a robust 16%.

Bucking the general trend, District 1, including the Richmond, Lake and Sea Cliff areas, saw single-family home sales shoot up by 38%. Days on the market rose 22% in District 1, a trend also seen in Balboa Terrace and the other neighborhoods of District 4, where days on the market the rose 54%, and in District 7, encompassing Pacific Heights and Cow Hollow, which rose 44%. Cow Hollow also demonstrated strength with median sales prices reaching 26% above last asking price, the highest among key neighborhoods tracked in this report.

If you are in the market to buy or sell real estate anywhere from Sausalito to San Jose or beyond, the agents affiliated with our San Francisco brokerage can point you in the right direction. We firmly believe that they represent not just the best agents in the Bay Area, but the best agents in the entire United States. Our globally recognized brand keeps them in constant contact with elite clients around the world. They also enjoy the support of a tight-knit community of top performing agents in our San Francisco office, as well as our extended network of 990 offices in 72 countries and territories.

Sotheby's International Realty remains the widely-recognized luxury leader in Northern California and around the world, a position we've reached by providing the highest levels of professional guidance to our clients. We look forward to being of service to you.



SAN FRANCISCO BROKERAGE

*Jeffrey Gibson*

*Senior Vice President & Brokerage Manager*

117 Greenwich Street | San Francisco, CA 94111

[SOTHEBYSHOMES.COM/SANFRANCISCO](https://www.sotbeyshomes.com/sanfrancisco)

Source: San Francisco Multiple Listing Service (SFMLS)/InfoSparks; 2019 data refer to sales for the year(s) specified. Data within this document are drawn from the SFAR MLS, BAREIS, and/or MLS Listings. \*Web data 1/1 - 3/31/19. Sotheby's International Realty and the Sotheby's International Realty logo are registered (or unregistered) service marks used with permission. Operated by Sotheby's International Realty, Inc. If your property is listed with a real estate broker, please disregard. It is not our intention to solicit the offerings of other real estate brokers. We are happy to work with them and cooperate fully. Real estate agents affiliated with Sotheby's International Realty, Inc. are independent contractor sales associates and are not employees of Sotheby's International Realty, Inc. SIR DRE: 899496. Jeffrey Gibson DRE: 01407690. Photo credit: Rich Hay



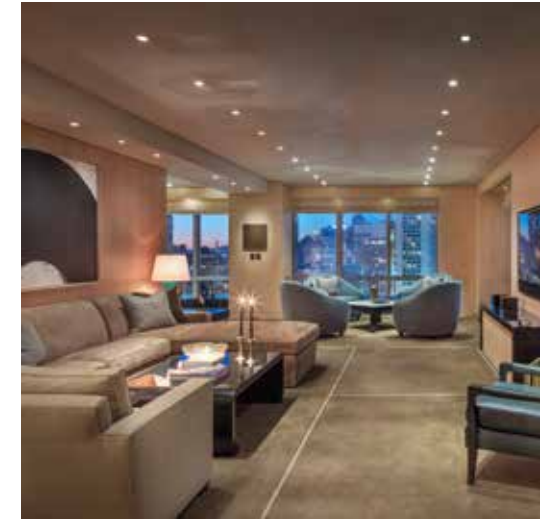
BAY AREA

# Featured Properties

We invite you to explore our exclusive offerings at [SOTHEBYSHOMES.COM/SANFRANCISCO](https://www.sotthebyshomes.com/sanfrancisco)



RUSSIAN HILL  
Dramatic Russian Hill Contemporary  
Offered at \$10,900,000  
[1089Chestnut.com](https://www.1089Chestnut.com)



FINANCIAL DISTRICT  
Price Upon Request  
[GreggLynn.com](https://www.GreggLynn.com)

PACIFIC HEIGHTS  
Offered at \$8,000,000  
[PacHtsMidCenturyModern.com](https://www.PacHtsMidCenturyModern.com)

FINANCIAL DISTRICT  
Offered at \$6,465,000  
[181Fremont60A.com](https://www.181Fremont60A.com)

PACIFIC HEIGHTS  
Offered at \$4,595,000  
[2973Pine.com](https://www.2973Pine.com)

\*IN ORDER FROM LEFT TO RIGHT, TOP TO BOTTOM

[SOTHEBYSHOMES.COM/SANFRANCISCO](https://www.sotthebyshomes.com/sanfrancisco)





# San Francisco

## FEATURED NEIGHBORHOODS

- DISTRICT 1 JORDAN PARK, LAKE, LAUREL HEIGHTS, RICHMOND, SEA CLIFF
- DISTRICT 4 BALBOA TERRACE, DIAMOND HEIGHTS, WEST PORTAL
- DISTRICT 5 CLARENDON HEIGHTS, DOLORES HEIGHTS, NOE VALLEY
- DISTRICT 6 ALAMO SQUARE, HAYES VALLEY, LOWER PAC HGTs, NOPA
- DISTRICT 7 MARINA, COW HOLLOW, PACIFIC HEIGHTS, PRESIDIO HEIGHTS
- DISTRICT 8 FINANCIAL DIST, RUSSIAN HILL, NOB HILL, TELEGRAPH HILL
- DISTRICT 9 BERNAL HEIGHTS, SOUTH BEACH, SOMA, YERBA BUENA



# San Francisco

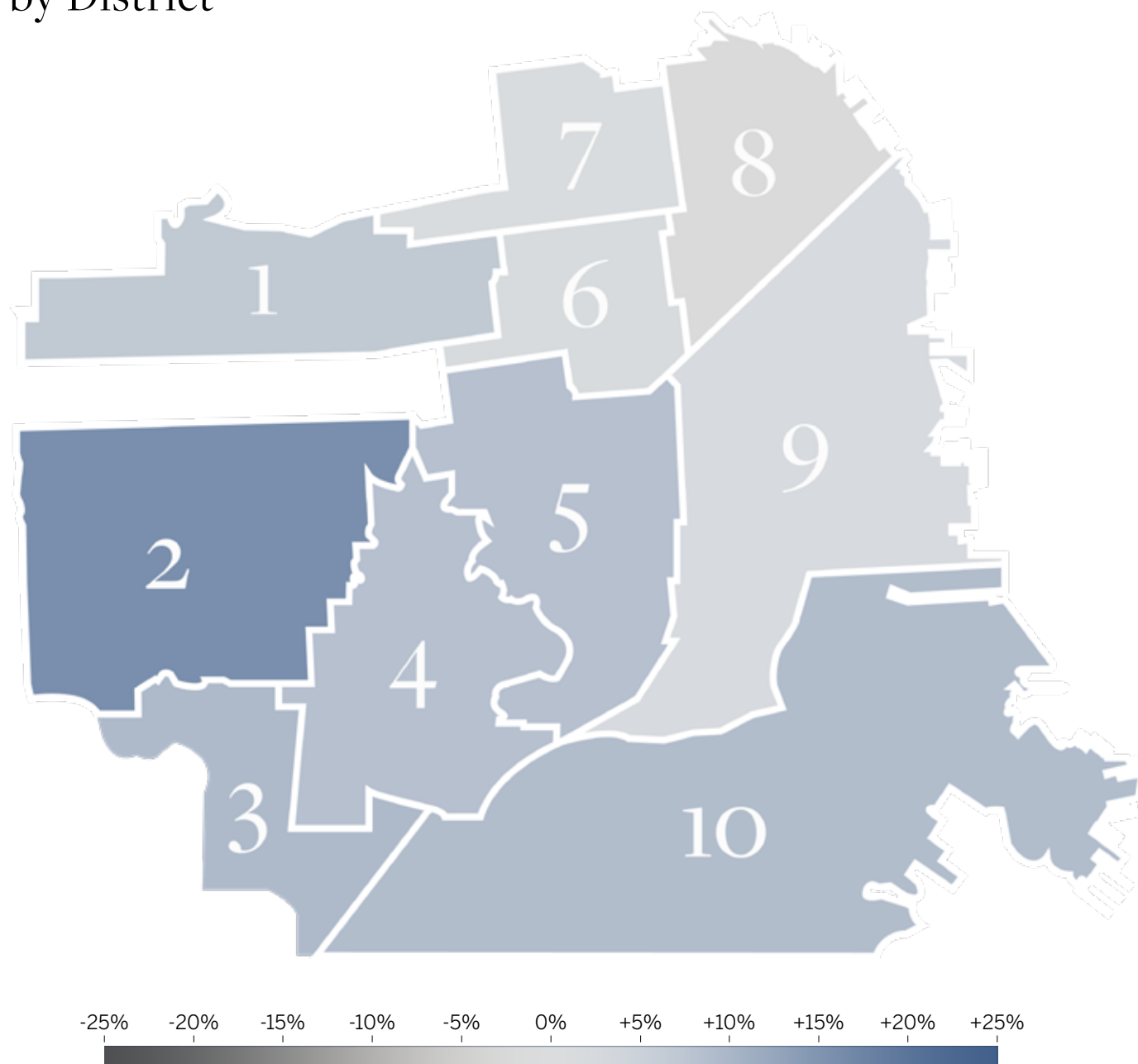
Market Snapshot | by District

# Q1 2019 Highlights

San Francisco

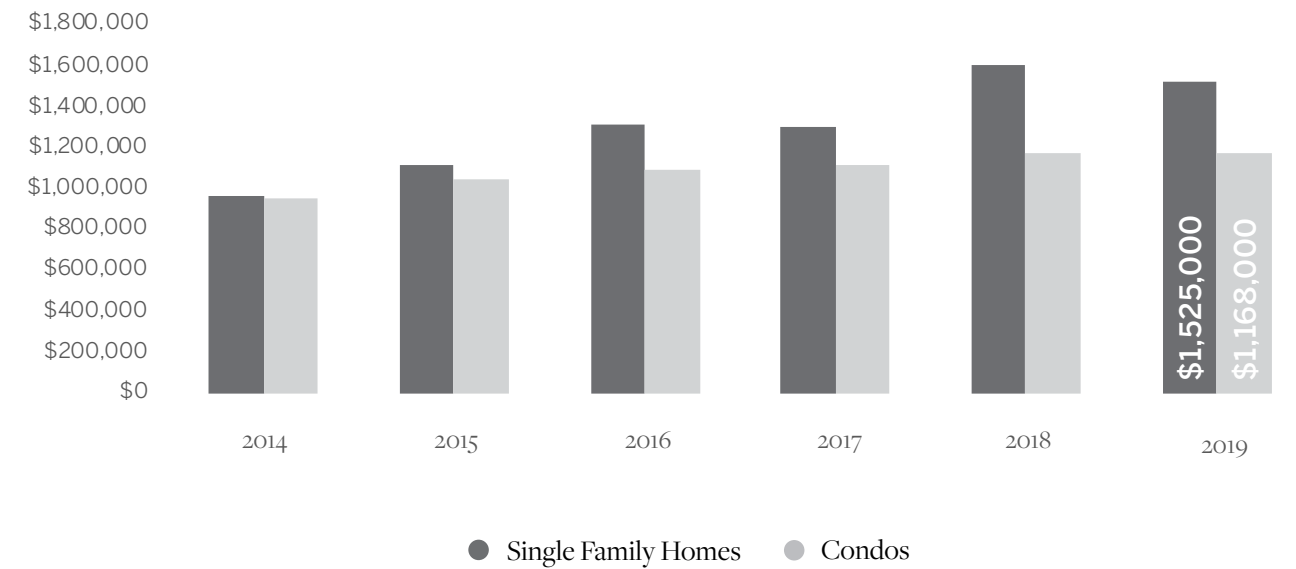
## Price Ratio by District

{Median Final Sale vs. Original List}



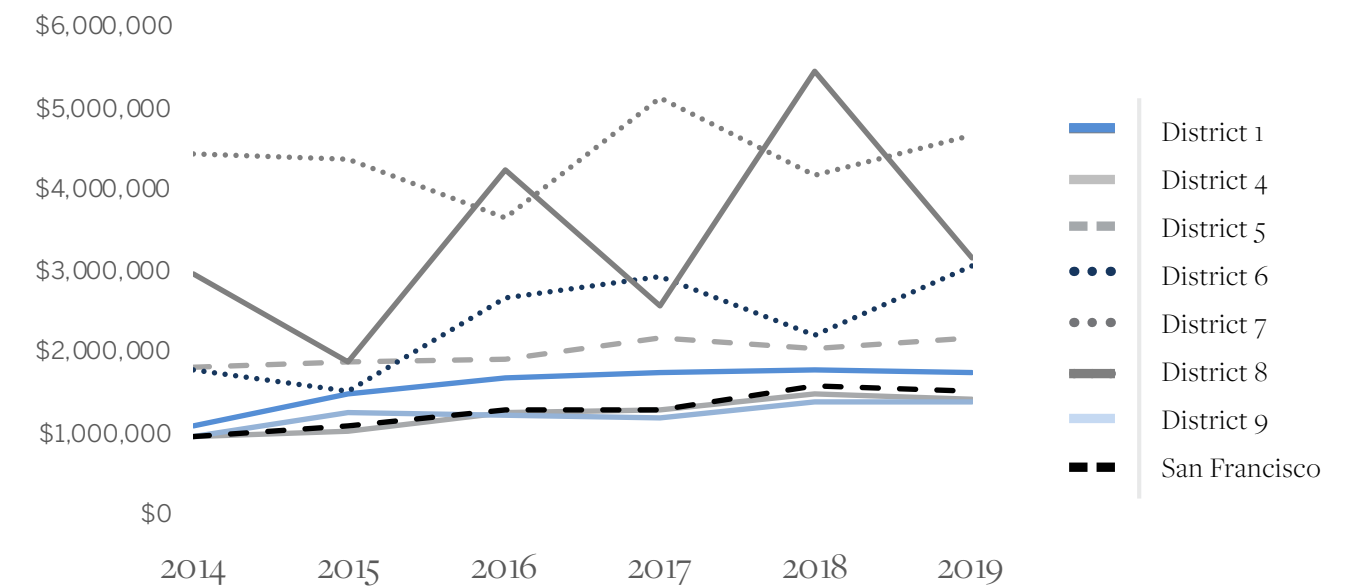
## San Francisco Median Sale Prices

{Single Family Homes vs. Condos}



## Districts Median Sale Prices

{Districts vs. San Francisco Overall}



{ Q1 2019 }

## at a glance

DISTRICT 1

- Jordan Park
- Lake
- Laurel Heights
- Lone Mountain
- Outer Richmond
- Central Richmond
- Inner Richmond
- Sea Cliff



# 63

Total Units Sold  
{ Single Family Homes and Condominiums }

# 0%

Change in Units Sold  
{ 2019 vs. 2018, Condominiums }

# \$1.7m

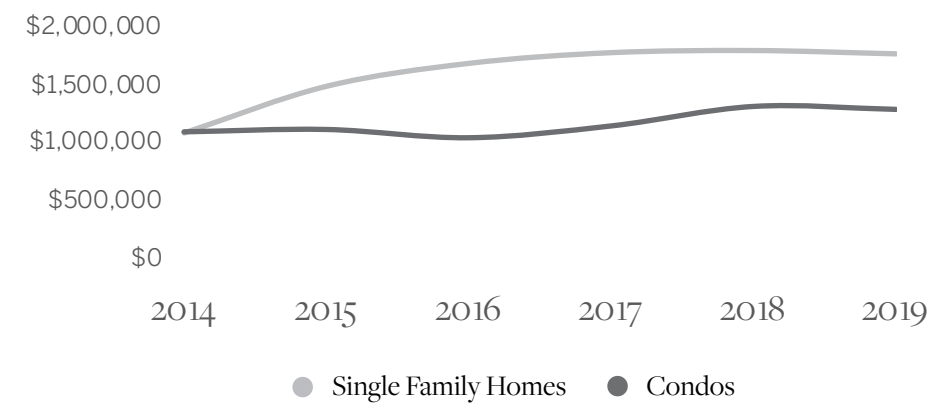
Median Sale Price  
{ Single Family Homes }

# 2%

Change in Median Sale Price  
{ 2019 vs. 2018, Condominiums }

<u>SINGLE FAMILY HOMES</u>	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	-7%	38%	6%	-	22%
2019	\$1,741,250	36	1,073	-2%	32
2018	\$1,867,500	26	1,010	4%	26
2017	\$1,865,750	30	890	5%	46
2016	\$1,900,000	29	858	13%	32
2015	\$1,722,500	34	830	15%	20

Median Sale Price | Single Family Homes vs. Condos

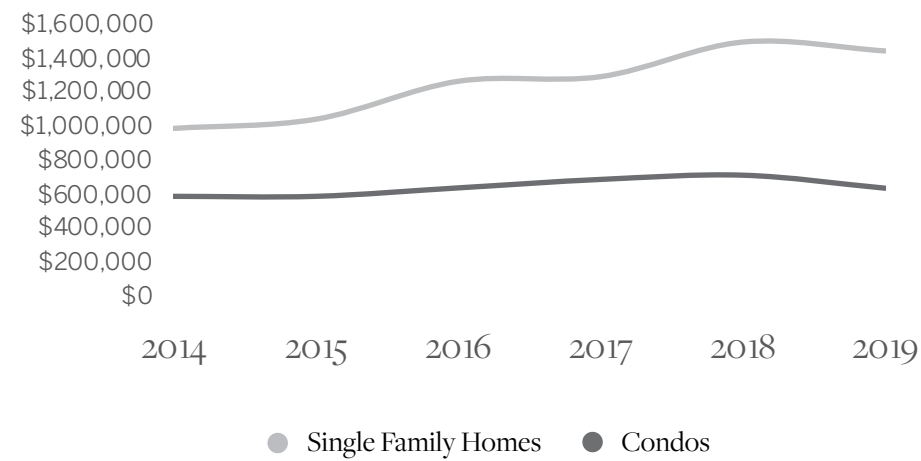


<u>CONDOMINIUMS</u>	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	2%	0%	12%	-	15%
2019	\$1,300,000	27	1,034	9%	26
2018	\$1,275,000	27	920	11%	23
2017	\$1,175,000	21	874	7%	26
2016	\$1,085,000	29	879	11%	25
2015	\$1,050,000	21	782	13%	36

# District 4

SINGLE FAMILY HOMES	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	-14%	2%	-9%	-	54%
2019	\$1,600,000	51	895	10%	30
2018	\$1,863,000	50	989	24%	19
2017	\$1,425,000	51	909	10%	27
2016	\$1,487,500	50	840	17%	24
2015	\$1,250,000	53	732	19%	33

Median Sale Price | Single Family Homes vs. Condos



CONDOMINIUMS	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	-26%	0%	14%	-	10%
2019	\$648,000	9	859	0%	70
2018	\$879,000	9	754	30%	63
2017	\$725,000	7	827	21%	24
2016	\$660,000	5	744	2%	56
2015	\$685,000	9	702	25%	24

## { Q1 2019 } at a glance

DISTRICT 4

- Balboa Terrace
- Diamond Heights
- Forest Hill
- Forest Hill Extension
- Forest Knolls
- Ingleside Terrace
- Midtown Terrace
- Miraloma Park
- Monterey Heights
- Mt Davidson Manor
- Sherwood Forest
- St. Francis Wood
- Sunnyside
- West Portal
- Westwood Highlands
- Westwood Park



# 60

Total Units Sold  
{ Single Family Homes and Condominiums }

# 0%

Change in Units Sold  
{ 2019 vs. 2018, Condominiums }

# \$1.6m

Median Sale Price  
{ Single Family Homes }

# -26%

Change in Median Sale Price  
{ 2019 vs. 2018, Condominiums }



{ Q1 2019 }

## at a glance

DISTRICT 5

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



# 119

Total Units Sold  
{ Single Family Homes and Condominiums }

# -26%

Change in Units Sold  
{ 2019 vs. 2018, Condominiums }

# \$2.4m

Median Sale Price  
{ Single Family Homes }

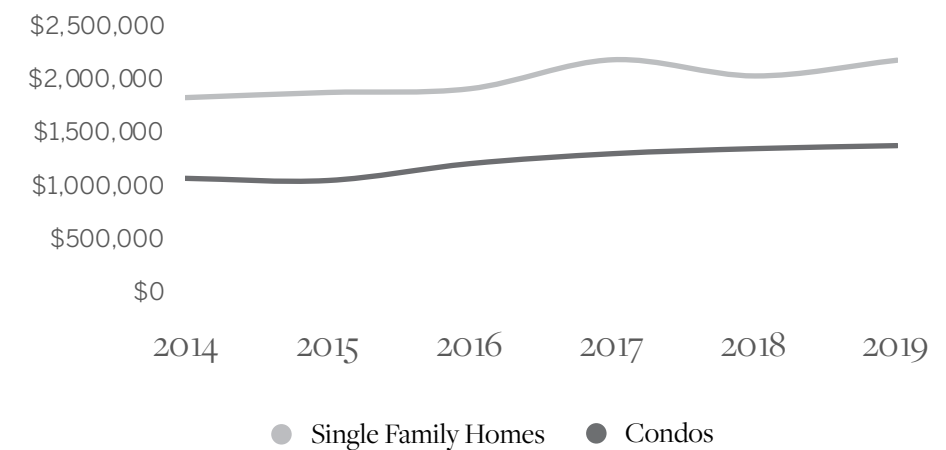
# 0%

Change in Median Sale Price  
{ 2019 vs. 2018, Condominiums }

### SINGLE FAMILY HOMES

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }					
Change	-4%	-11%	-4%	-	10%
2019	\$2,350,000	55	1,183	7%	29
2018	\$2,450,000	62	1,233	20%	26
2017	\$2,400,000	61	1,108	9%	22
2016	\$2,277,700	49	1,137	18%	27
2015	\$2,100,000	65	1,106	11%	21

Median Sale Price | Single Family Homes vs. Condos



### CONDOMINIUMS

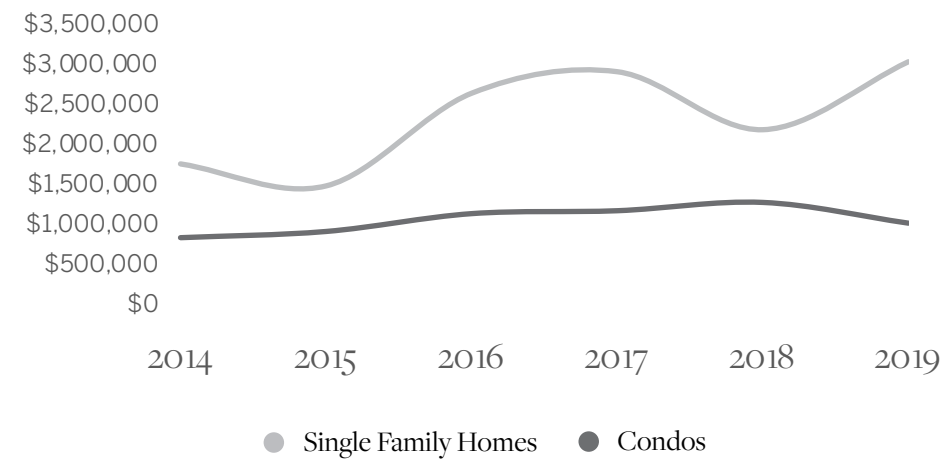
	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }					
Change	0%	-26%	2%	-	-5%
2019	\$1,400,000	64	1,152	12%	22
2018	\$1,404,000	86	1,130	9%	23
2017	\$1,331,250	82	1,002	11%	27
2016	\$1,253,500	66	1,004	14%	47
2015	\$1,225,000	97	1,035	36%	30



# District 6

SINGLE FAMILY HOMES	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	29%	-17%	14%	-	-43%
2019	\$3,137,500	10	1,157	2%	26
2018	\$2,430,000	12	1,018	9%	46
2017	\$3,162,500	8	1,074	7%	34
2016	\$2,830,000	3	1,184	6%	69
2015	\$1,507,500	4	1,318	-1%	11

Median Sale Price | Single Family Homes vs. Condos

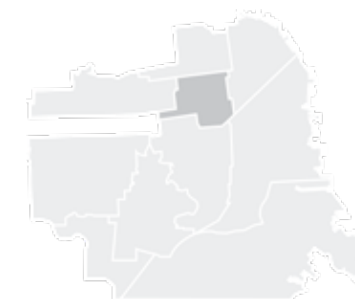


CONDOMINIUMS	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	-16%	-40%	-12%	-	18%
2019	\$1,050,000	45	984	-3%	47
2018	\$1,245,000	75	1,118	4%	40
2017	\$1,200,000	70	1,046	6%	37
2016	\$1,067,500	59	971	7%	39
2015	\$1,100,000	65	898	22%	30

## { Q1 2019 } at a glance

DISTRICT 6

- Alamo Square
- Hayes Valley
- Western Addition
- Lower Pacific Heights
- Anza Vista
- North Panhandle (NoPa)



# 55

Total Units Sold  
{ Single Family Homes and Condominiums }

# -17%

Change in Units Sold  
{ 2019 vs. 2018, Single Family Homes }

# \$3.1m

Median Sale Price  
{ Single Family Homes }

# 29%

Change in Median Sale Price  
{ 2019 vs. 2018, Single Family Homes }







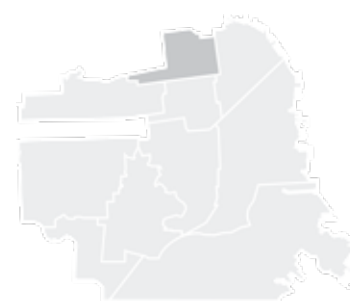
# District 7

{ Q1 2019 }

## at a glance

DISTRICT 7

- The Marina
- Cow Hollow
- Pacific Heights
- Presidio Heights



# 89

Total Units Sold  
{ Single Family Homes and Condominiums }

# -14%

Change in Units Sold  
{ 2019 vs. 2018, Single Family Homes }

# \$4.5m

Median Sale Price  
{ Single Family Homes }

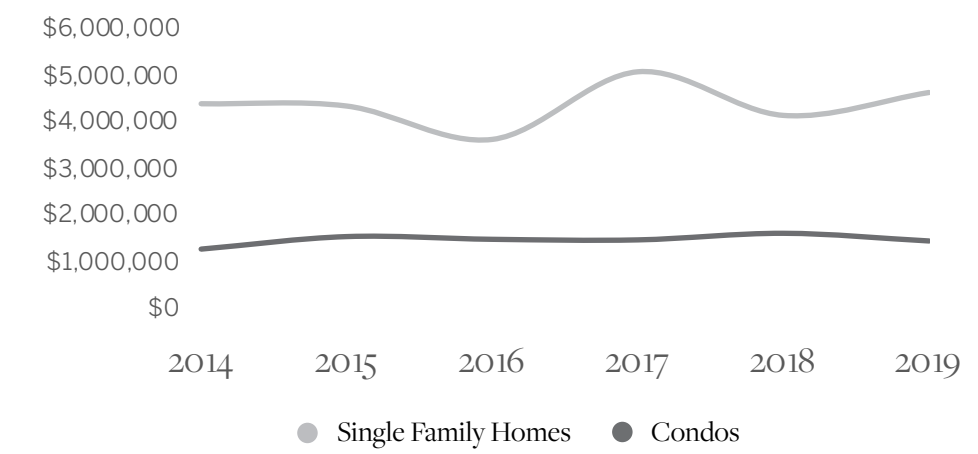
# 5%

Change in Median Sale Price  
{ 2019 vs. 2018, Single Family Homes }

### SINGLE FAMILY HOMES

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }					
Change	5%	-14%	-6%	-	44%
2019	\$4,450,000	19	1,261	-5%	47
2018	\$4,250,000	22	1,337	1%	33
2017	\$4,897,500	12	1,357	-5%	48
2016	\$3,625,000	18	1,588	-1%	29
2015	\$5,200,000	19	1,438	18%	18

### Median Sale Price | Single Family Homes vs. Condos



### CONDOMINIUMS

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }					
Change	-2%	8%	-6%	-	40%
2019	\$1,475,000	70	1,184	6%	37
2018	\$1,497,500	65	1,254	-4%	26
2017	\$1,575,000	69	1,125	9%	39
2016	\$1,458,500	44	1,210	-6%	28
2015	\$1,495,000	63	1,131	7%	25

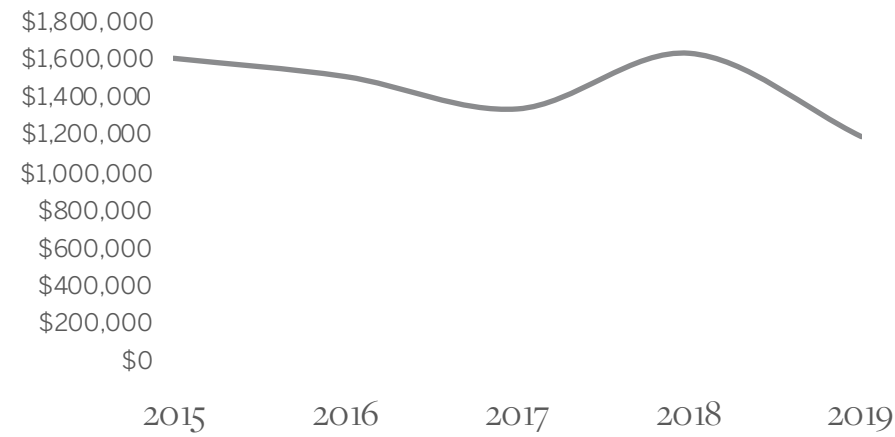




# Neighborhood Highlights

## Cow Hollow

{Median Sale Price | Condominiums over Five Years}



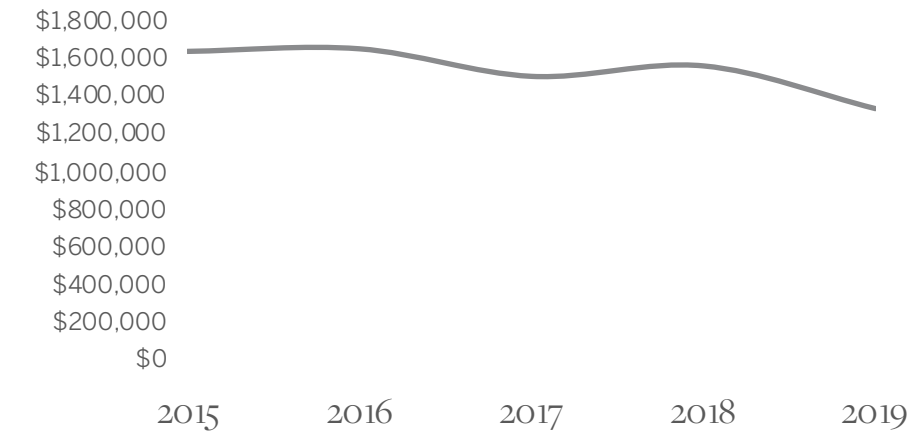
**26%**  
Median Sale vs. Original List

**34**  
Average DOM

**\$1,284**  
\$/Square Foot

## Pacific Heights

{Median Sale Price | Condominiums over Five Years}



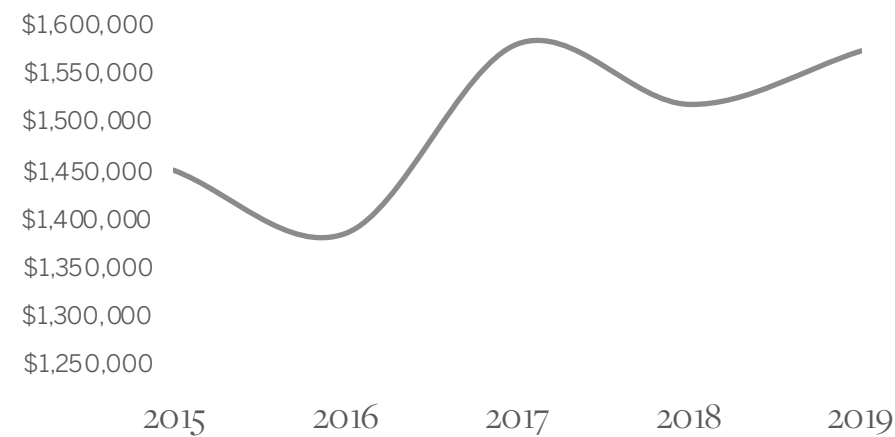
**-3%**  
Median Sale vs. Original List

**40**  
Average DOM

**\$1,135**  
\$/Square Foot

## Marina

{Median Sale Price | Condominiums over Five Years}



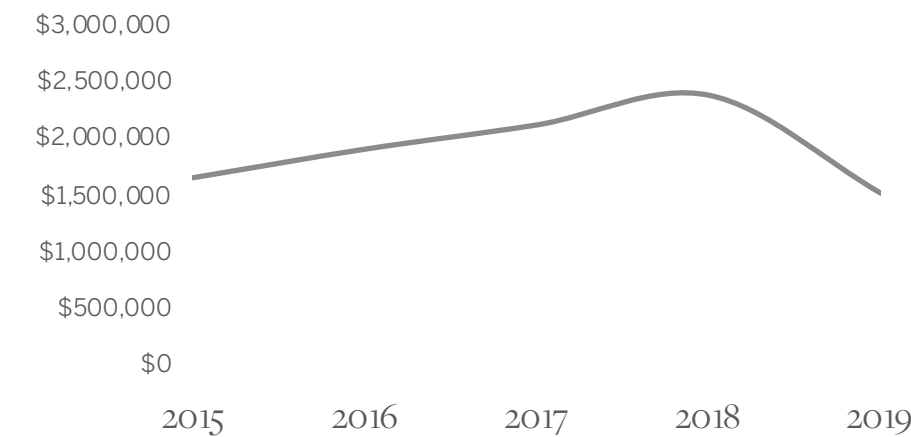
**5%**  
Median Sale vs. Original List

**39**  
Average DOM

**\$1,220**  
\$/Square Foot

## Presidio Heights

{Median Sale Price | Condominiums over Five Years}



**4%**  
Median Sale vs. Original List

**10**  
Average DOM

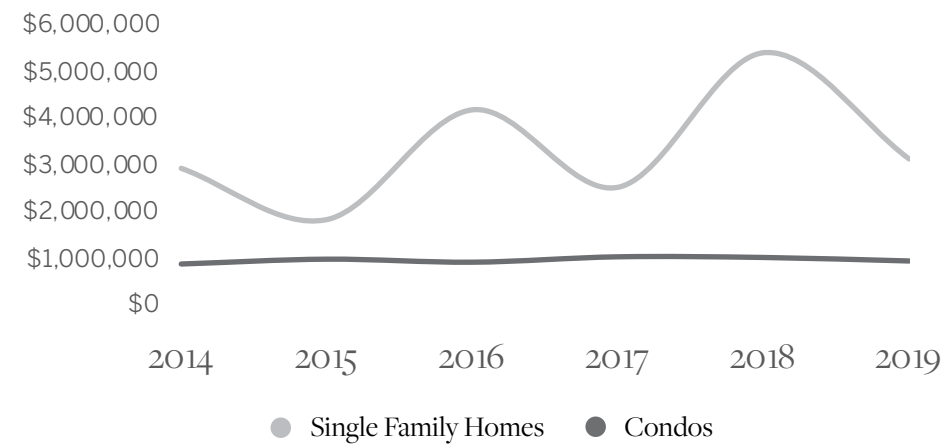
**\$1,134**  
\$/Square Foot



# District 8

SINGLE FAMILY HOMES	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	-39%	-33%	23%	-	187%
2019	\$3,125,000	4	1,461	-2%	74
2018	\$5,097,500	6	1,190	-7%	26
2017	\$2,635,000	5	1,141	2%	63
2016	\$4,000,000	1	1,127	-6%	18
2015	\$2,100,000	3	2,174	11%	27

Median Sale Price | Single Family Homes vs. Condos



CONDOMINIUMS	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	-9%	-9%	2%	-	22%
2019	\$985,000	89	1,186	4%	63
2018	\$1,085,000	98	1,168	4%	51
2017	\$1,100,000	96	1,166	4%	47
2016	\$998,000	83	1,106	11%	35
2015	\$1,050,000	81	1,038	11%	40

## { Q1 2019 } at a glance

- DISTRICT 8
- Civic Center
  - Downtown
  - Financial District
  - North Beach
  - Russian Hill
  - Nob Hill
  - Telegraph Hill
  - Tenderloin
  - North Waterfront



93  
Total Units Sold  
{ Single Family Homes and Condominiums }

-9%  
Change in Units Sold  
{ 2019 vs. 2018, Condominiums }

\$3.1m  
Median Sale Price  
{ Single Family Homes }

-39%  
Change in Median Sale Price  
{ 2019 vs. 2018, Single Family Homes }



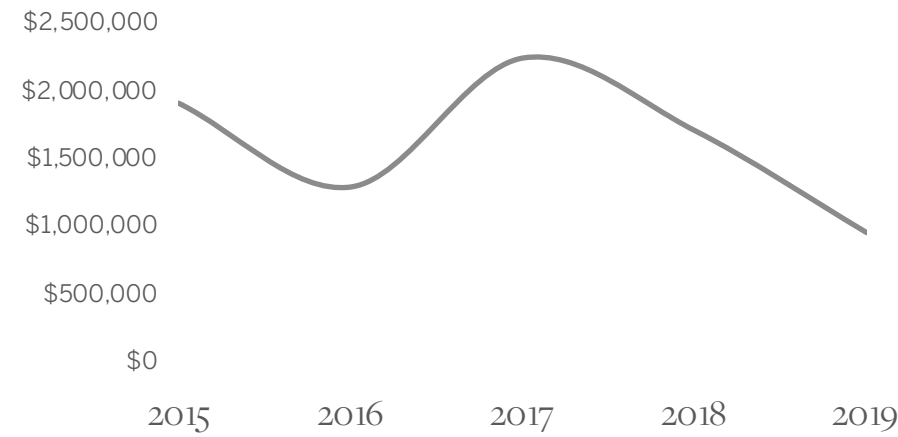


# Neighborhood Highlights



## Financial District

{Median Sale Price | Condominiums over Five Years}



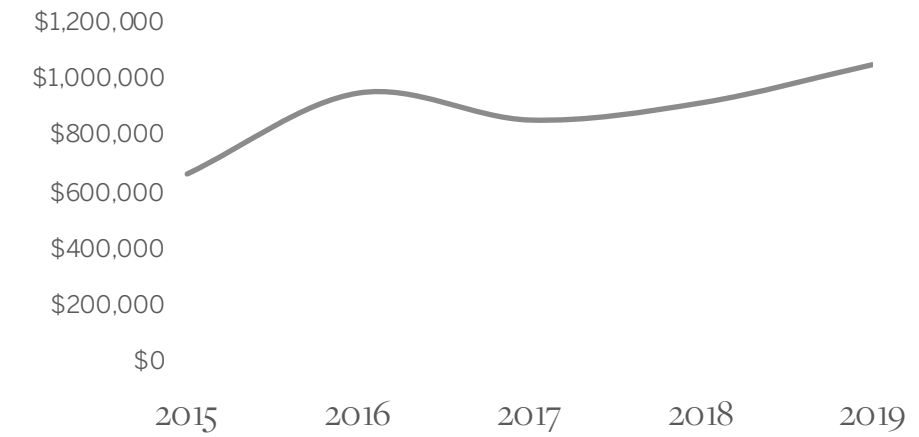
0%  
Median Sale vs. Original List

60  
Average DOM

\$1,247  
\$/Square Foot

## North Waterfront

{Median Sale Price | Condominiums over Five Years}



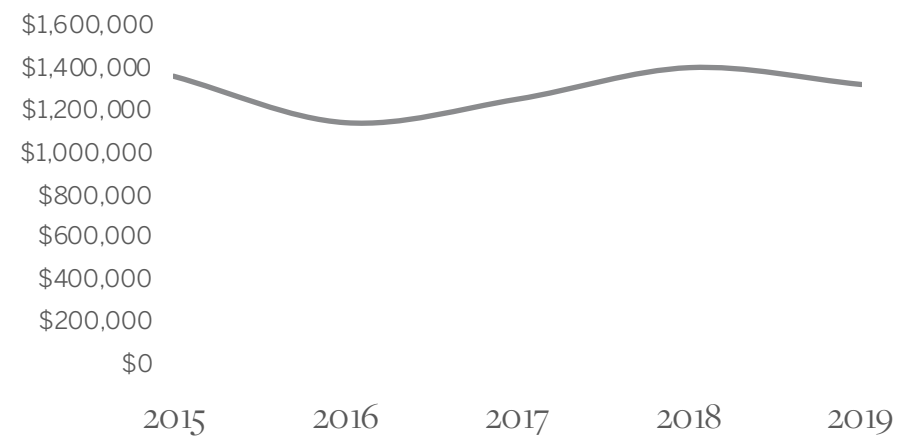
6%  
Median Sale vs. Original List

22  
Average DOM

\$909  
\$/Square Foot

## Nob Hill

{Median Sale Price | Condominiums over Five Years}



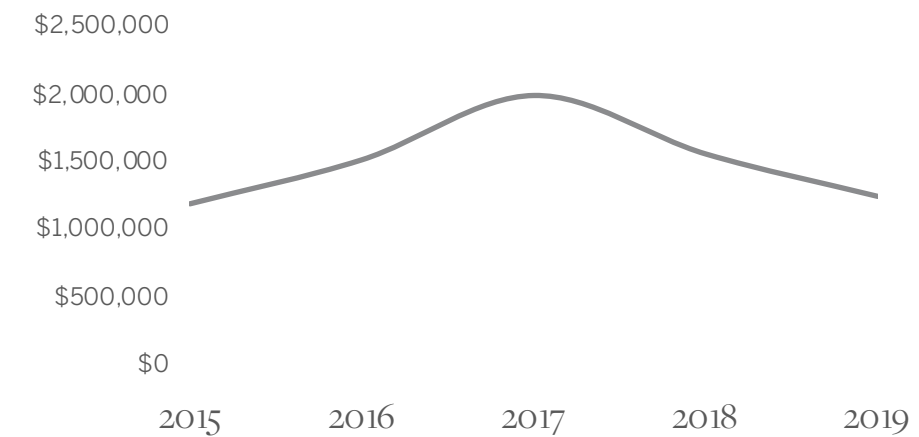
0%  
Median Sale vs. Original List

78  
Average DOM

\$1,140  
\$/Square Foot

## Russian Hill

{Median Sale Price | Condominiums over Five Years}



12%  
Median Sale vs. Original List

48  
Average DOM

\$1,350  
\$/Square Foot





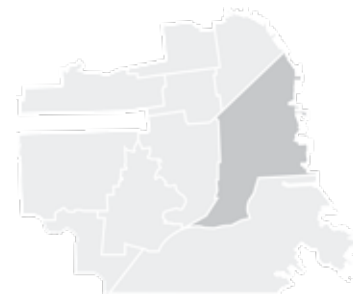
# District 9

{ Q1 2019 }

## at a glance

DISTRICT 9

- Bernal Heights
- Dogpatch
- Inner Mission
- Mission Bay
- Potrero Hill
- South Beach
- SoMa
- Yerba Buena



# 230

Total Units Sold  
{ Single Family Homes and Condominiums }

# -20%

Change in Units Sold  
{ 2019 vs. 2018, Single Family Homes }

# \$1.5m

Median Sale Price  
{ Single Family Homes }

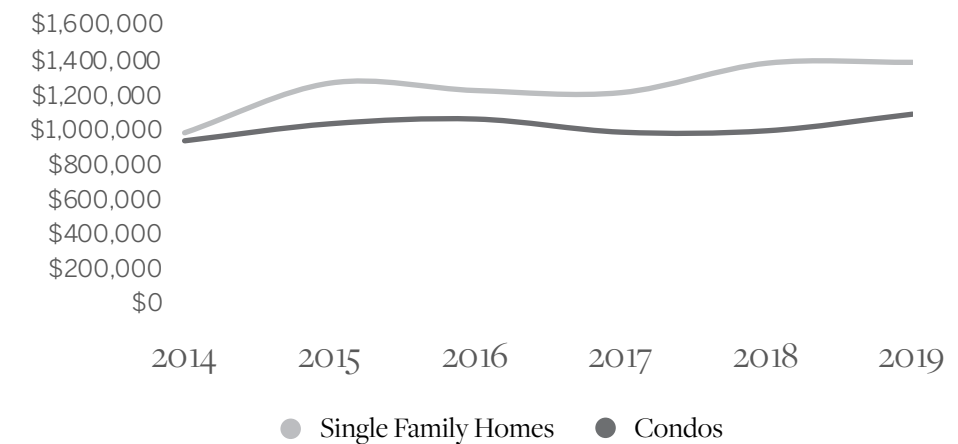
# -15%

Change in Median Sale Price  
{ 2019 vs. 2018, Single Family Homes }

### SINGLE FAMILY HOMES

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	-15%	-20%	-7%	-	27%
2019	\$1,460,000	37	999	4%	26
2018	\$1,715,001	46	1,075	23%	20
2017	\$1,375,000	46	987	12%	28
2016	\$1,415,000	38	981	15%	23
2015	\$1,400,000	59	912	9%	24

### Median Sale Price | Single Family Homes vs. Condos



### CONDOMINIUMS

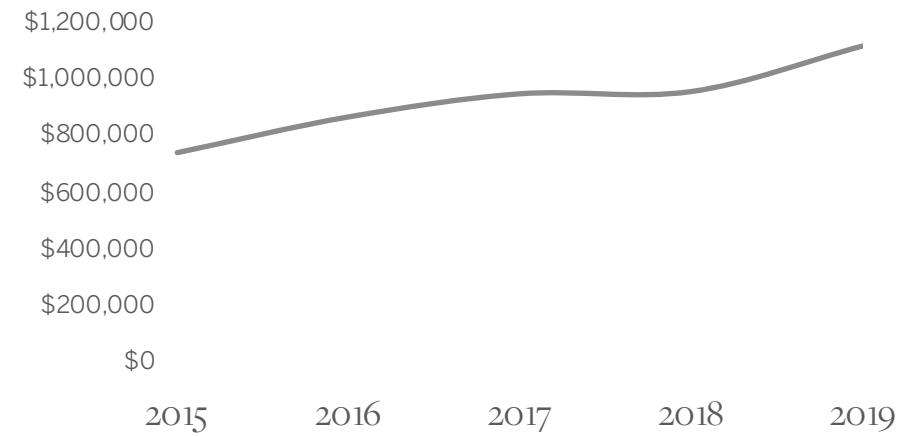
	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	-3%	-16%	-3%	-	0%
2019	\$1,100,000	193	1,107	0%	37
2018	\$1,131,000	229	1,143	14%	37
2017	\$1,070,000	208	1,014	12%	46
2016	\$1,027,500	241	1,086	3%	38
2015	\$1,059,650	220	1,042	7%	36

# Neighborhood Highlights



## Bernal Heights

{Median Sale Price | Single Family Homes over Five Years}



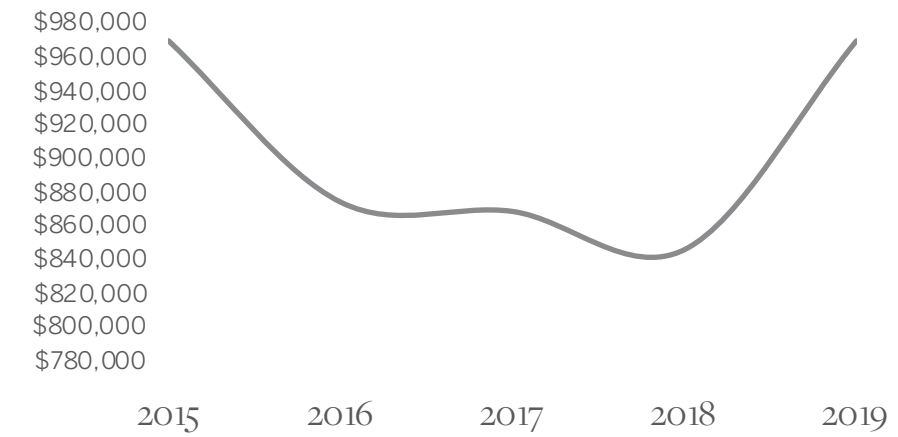
16%  
Median Sale vs. Original List

18  
Average DOM

\$870  
\$/Square Foot

## SoMa

{Median Sale Price | Condominiums over Five Years}



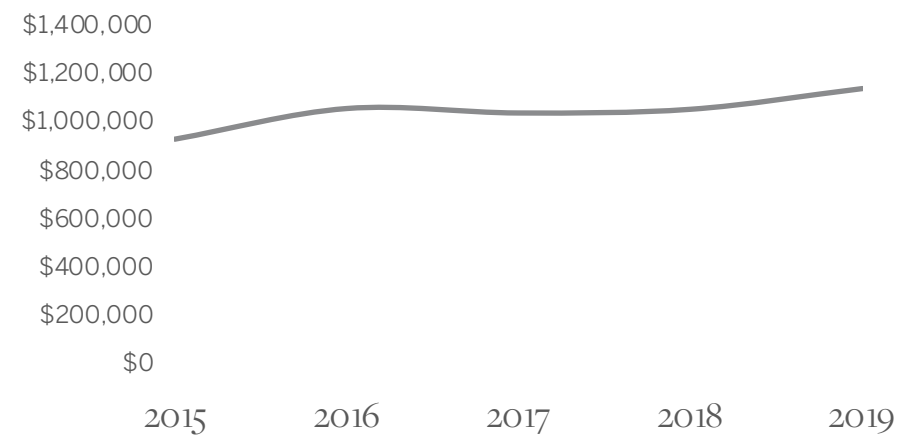
4%  
Median Sale vs. Original List

49  
Average DOM

\$1,032  
\$/Square Foot

## Inner Mission

{Median Sale Price | Condominiums over Five Years}



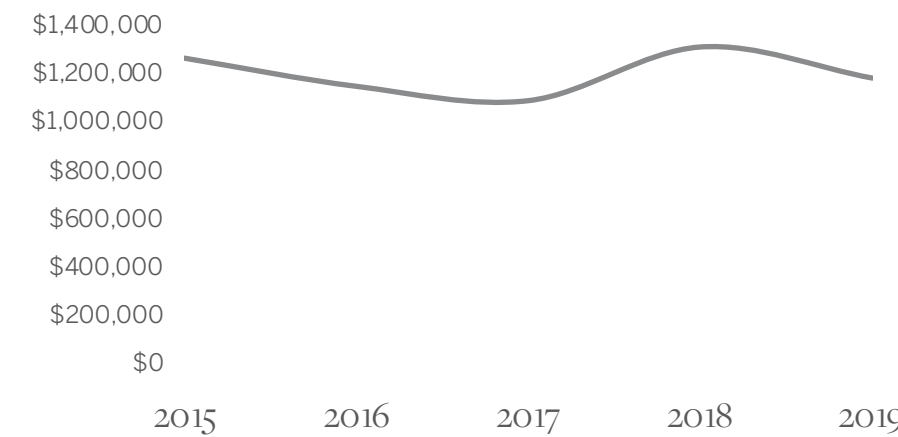
15%  
Median Sale vs. Original List

23  
Average DOM

\$1,068  
\$/Square Foot

## South Beach

{Median Sale Price | Condominiums over Five Years}



-1%  
Median Sale vs. Original List

41  
Average DOM

\$1,204  
\$/Square Foot



SAN FRANCISCO

# Extraordinary Results

*We celebrate the notable success of our associates and clients*



LAKE STREET DISTRICT  
North of Lake Treasure  
Last Asking \$4,800,000



NOE VALLEY  
Pacific Heights Garden Home  
Last Asking \$4,695,000

LAKE STREET DISTRICT  
Enchanting Lake District Victorian  
Last Asking \$3,950,000

PACIFIC HEIGHTS  
Prime Pacific Heights Condominium  
Last Asking \$3,695,000

RUSSIAN HILL  
Exquisite Residence, Stunning Views  
Last Asking \$3,500,000

\*IN ORDER FROM LEFT TO RIGHT, TOP TO BOTTOM

[SOTHEBYSHOMES.COM/SANFRANCISCO](https://www.sotthebyshomes.com/sanfrancisco)



# Marin County

MARKET SNAPSHOT

BELVEDERE

KENTFIELD

MILL VALLEY

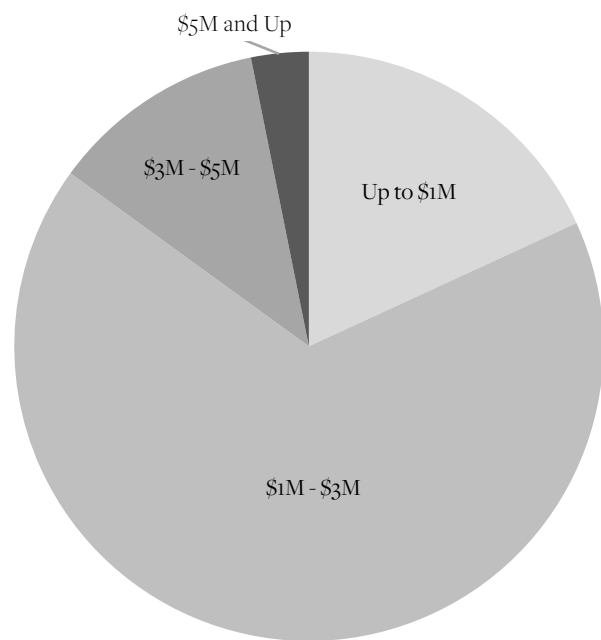
ROSS

SAN RAFAEL

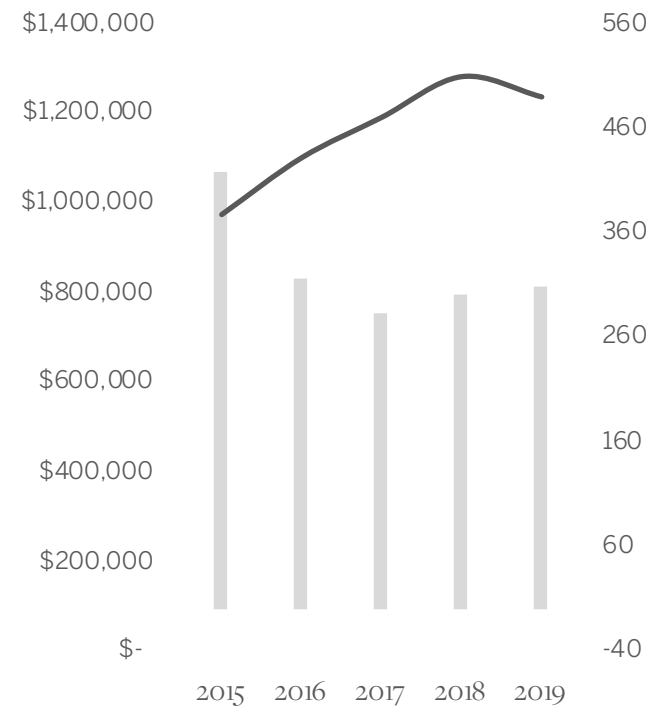
SAUSALITO

TIBURON

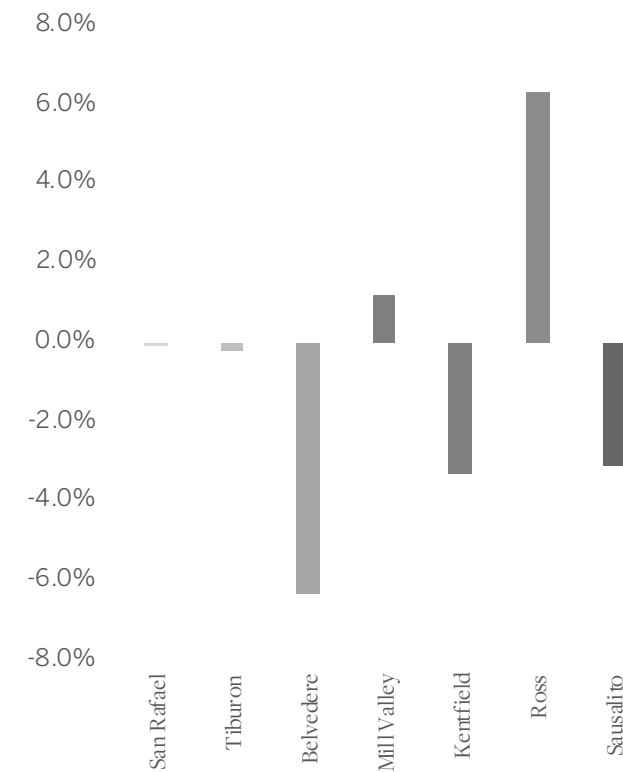




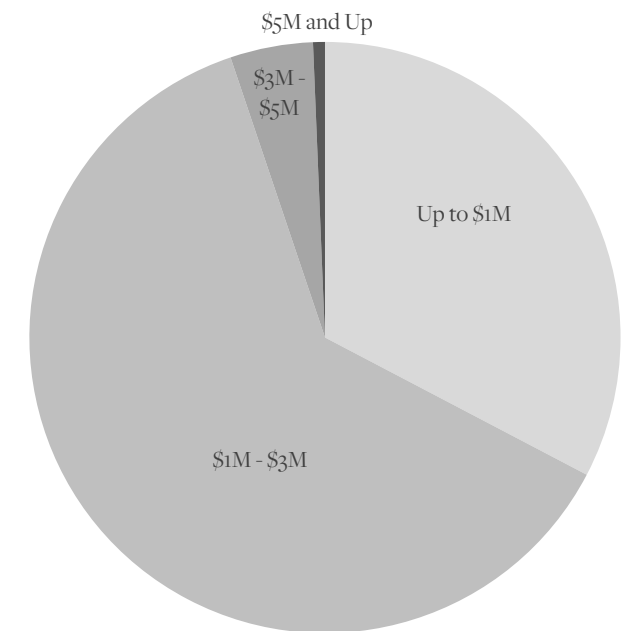
Sales Volume by Price Category



Median Sale Price vs. Total Units Sold



Final Sale vs. Original List



Total Units Sold by Price Category

- 33% Up to \$1 Million
- 62% \$1 Million to \$3 Million
- 5% \$3 Million to \$5 Million
- 1% \$5 Million and Up

- Median Sale Price
- Total Units Sold

- 0% San Rafael
- 0% Tiburon
- -6% Belvedere
- 1% Mill Valley
- -3% Kentfield
- 6% Ross
- -3% Sausalito

- 18% Up to \$1 Million
- 67% \$1 Million to \$3 Million
- 12% \$3 Million to \$5 Million
- 3% \$5 Million and Up



{ Q1 2019 }

# at a glance

BELVEDERE

# 6

Units Sold

# 50%

Change in Units Sold  
{ 2019 vs. 2018 }

# \$3.8m

Median Sale Price

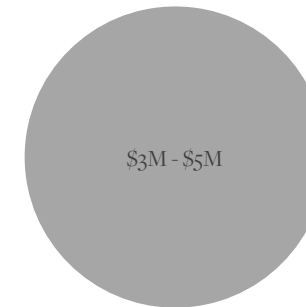
# 35%

Change in Median Sale Price  
{ 2019 vs. 2018 }

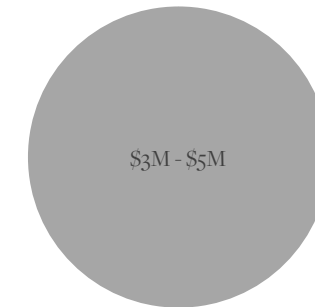
# Belvedere

Single Family Homes Sales

Sales Volume  
by Price Category

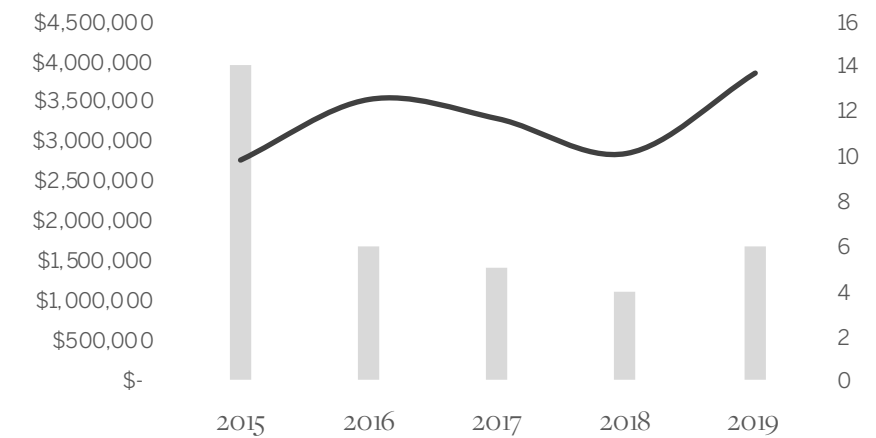


Total Units Sold  
by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	35%	50%	-8%	-	99%
2019	\$3,839,000	6	\$1,163	-6%	207
2018	\$2,842,500	4	\$1,264	-1%	104
2017	\$3,272,500	5	\$1,456	-52%	227
2016	\$3,512,500	6	\$1,193	-3%	238
2015	\$2,760,000	14	\$998	-5%	149

Median Sale Price | Total Units Sold



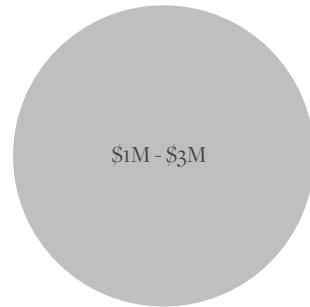
● Median Selling Price ● Total Units Sold



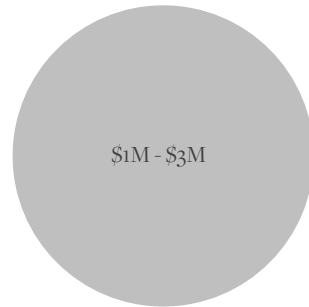
# Kentfield

Single Family Homes Sales

Sales Volume by Price Category



Total Units Sold by Price Category

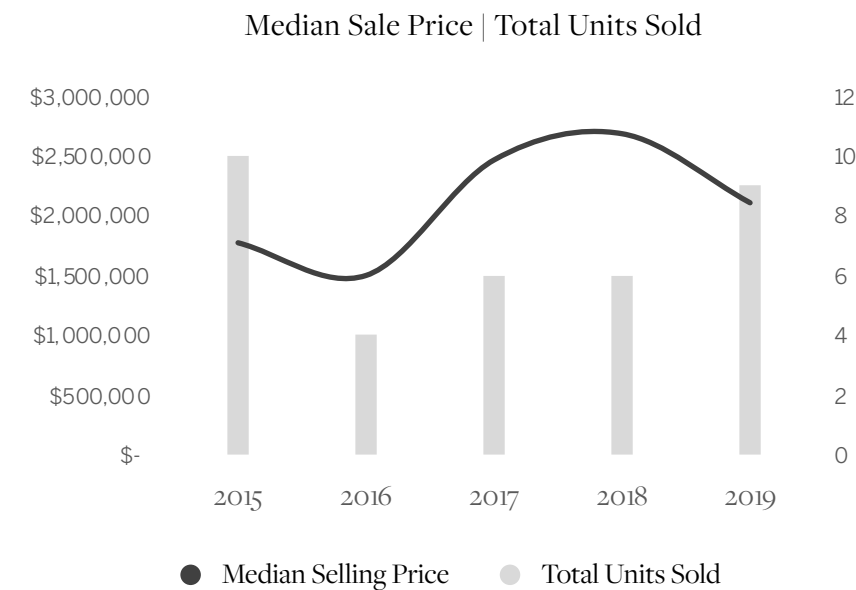


{ Q1 2019 }

## at a glance

KENTFIELD

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	-21%	50%	-11%	-	157%
2019	\$2,119,000	9	\$807	-3%	164
2018	\$2,695,000	6	\$904	1%	64
2017	\$2,476,250	6	\$842	2%	61
2016	\$1,512,500	4	\$979	0%	64
2015	\$1,785,000	10	\$794	3%	49



9

Units Sold

50%

Change in Units Sold  
{ 2019 vs. 2018 }

\$2.1m

Median Sale Price

-21%

Change in Median Sale Price  
{ 2019 vs. 2018 }

{ Q1 2019 }

## at a glance

MILL VALLEY

# 38

Units Sold

# -3%

Change in Units Sold  
{ 2019 vs. 2018 }

# \$1.5m

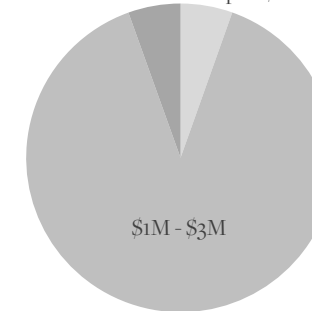
Median Sale Price

# 2%

Change in Median Sale Price  
{ 2019 vs. 2018 }

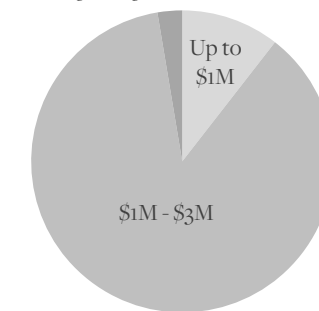
Sales Volume by Price Category

\$3M - \$5M    Up to \$1M



Total Units Sold by Price Category

\$3M - \$5M



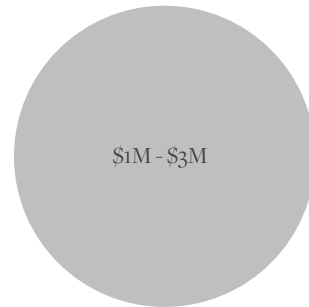
	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	2%	-3%	-13%	-	53%
2019	\$1,525,000	38	\$774	1%	123
2018	\$1,500,000	39	\$891	0%	80
2017	\$1,592,500	48	\$781	1%	120
2016	\$1,297,500	34	\$755	2%	100
2015	\$1,340,000	60	\$681	1%	90

Median Sale Price | Total Units Sold

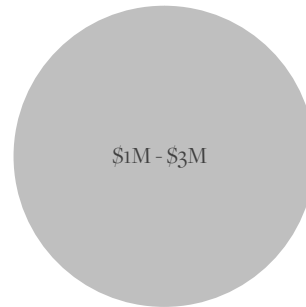




Sales Volume by Price Category



Total Units Sold by Price Category



{ Q1 2019 }

## at a glance

ROSS

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	-46%	400%	-27%	-	342%
2019	\$2,250,000	5	\$935	6%	115
2018	\$4,205,000	1	\$1,275	5%	26
2017	\$4,300,000	1	\$851	-4%	198
2016	\$2,735,000	5	\$830	-10%	120
2015	\$2,297,500	6	\$869	-1%	65

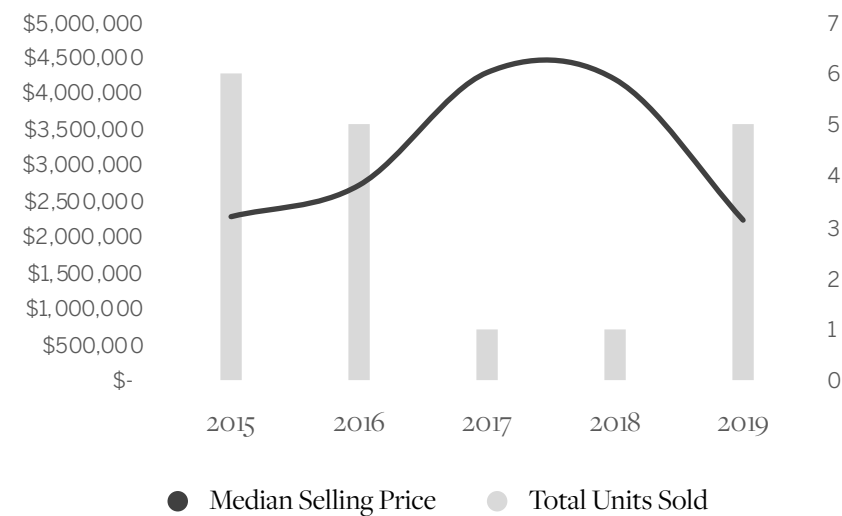
5  
Unit Sold

400%  
Change in Units Sold  
{ 2019 vs. 2018 }

\$2.3m  
Median Sale Price

-46%  
Change in Median Sale Price  
{ 2019 vs. 2018 }

Median Sale Price | Total Units Sold



{Q1 2019 }

## at a glance

SAN RAFAEL

# 72

Units Sold

# -6%

Change in Units Sold  
{ 2019 vs. 2018 }

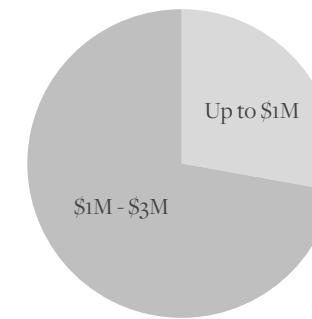
# \$1.1m

Median Sale Price

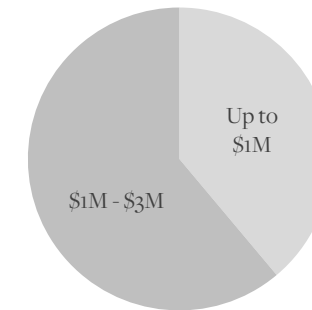
# 6%

Change in Median Sale Price  
{ 2019 vs. 2018 }

Sales Volume by Price Category

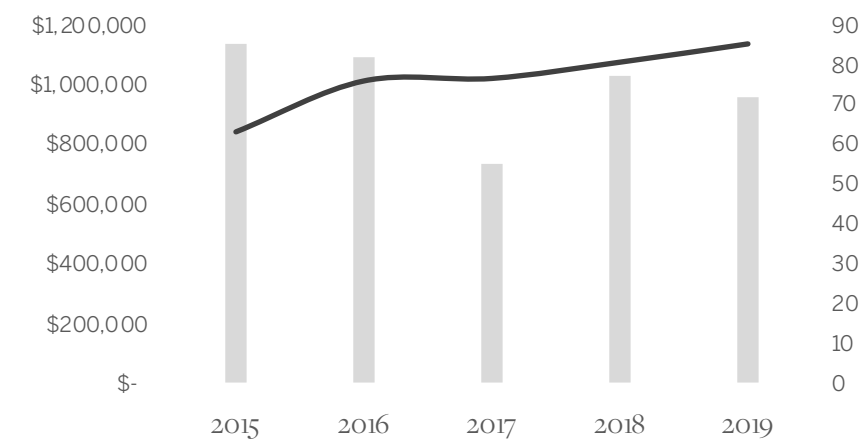


Total Units Sold by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	6%	-6%	-3%	-	0%
2019	\$1,137,000	72	\$604	0%	87
2018	\$1,075,000	77	\$625	2%	87
2017	\$1,020,000	55	\$566	3%	91
2016	\$1,011,500	82	\$530	1%	87
2015	\$839,000	85	\$475	4%	91

Median Sale Price | Total Units Sold



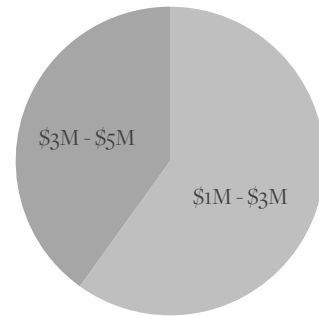
● Median Selling Price ● Total Units Sold



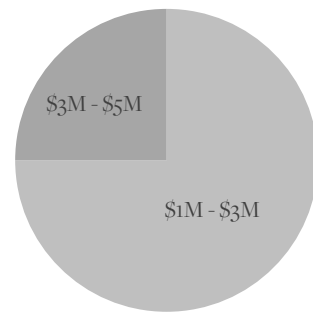
# Sausalito

Single Family Homes Sales

Sales Volume by Price Category



Total Units Sold by Price Category



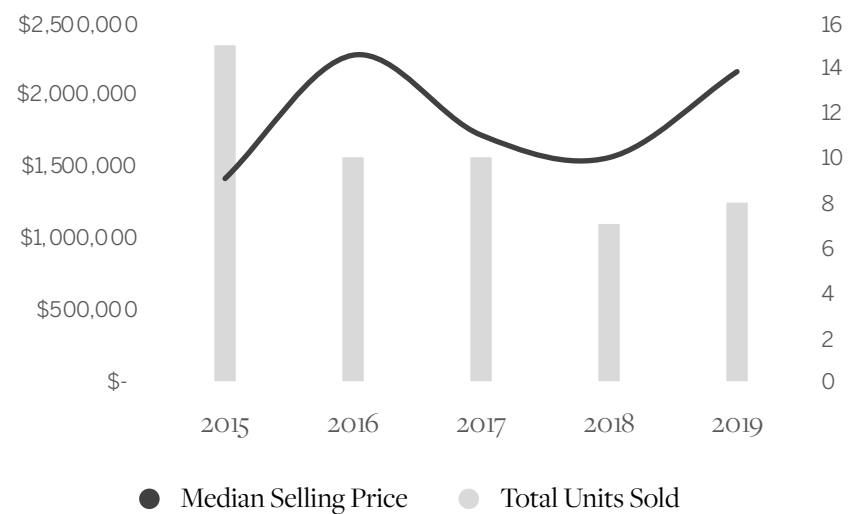
{Q1 | 2019 }

## at a glance

SAUSALITO

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	38%	14%	19%	-	-36%
2019	\$2,162,500	8	\$910	-3%	117
2018	\$1,570,000	7	\$765	-1%	184
2017	\$1,725,000	10	\$844	-3%	191
2016	\$2,276,000	10	\$804	-3%	92
2015	\$1,425,000	15	\$732	-2%	192

Median Sale Price | Total Units Sold



8

Units Sold

14%

Change in Units Sold {2019 vs. 2018 }

\$2.2m

Median Sale Price

38%

Change in Median Sale Price {2019 vs. 2018 }

{2019}

## at a glance

TIBURON

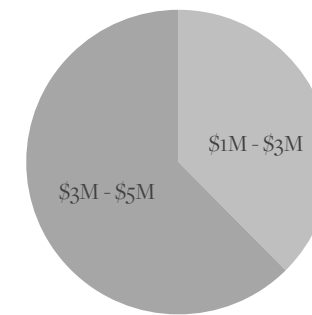
5  
Units Sold

-72%  
Change in Units Sold  
{ 2019 vs. 2018 }

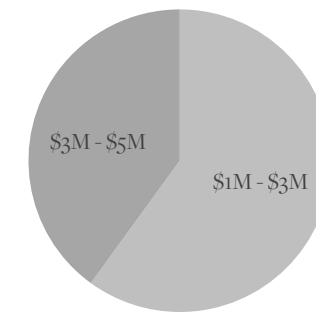
\$2.3m  
Median Sale Price

-14%  
Change in Median Sale Price  
{ 2019 vs. 2018 }

Sales Volume  
by Price Category



Total Units Sold  
by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }					
Change	-14%	-72%	6%	-	-8%
2019	\$2,260,000	5	\$1,048	0%	119
2018	\$2,630,000	18	\$992	-1%	130
2017	\$2,557,500	16	\$1,040	-4%	123
2016	\$1,975,000	15	\$903	-27%	113
2015	\$2,870,000	25	\$779	-4%	142

Median Sale Price | Total Units Sold





MARIN COUNTY

# Extraordinary Results

*We celebrate the notable success of our associates and clients*



TIBURON  
Modern Vision Tiburon  
Last Asking \$15,950,000



MILL VALLEY  
Mill Valley Masterpiece  
Last Asking \$4,999,000

ROSS  
112 Winding Way  
Last Asking \$3,650,000

TIBURON  
Sophisticated One-Story Contemporary  
Last Asking \$2,395,000

SAUSALITO  
Modern Design meets Rustic Luxury  
Last Asking \$1,898,000

\*IN ORDER FROM LEFT TO RIGHT, TOP TO BOTTOM

[SOTHEBYSHOMES.COM/SANFRANCISCO](https://www.sotthebyshomes.com/sanfrancisco)



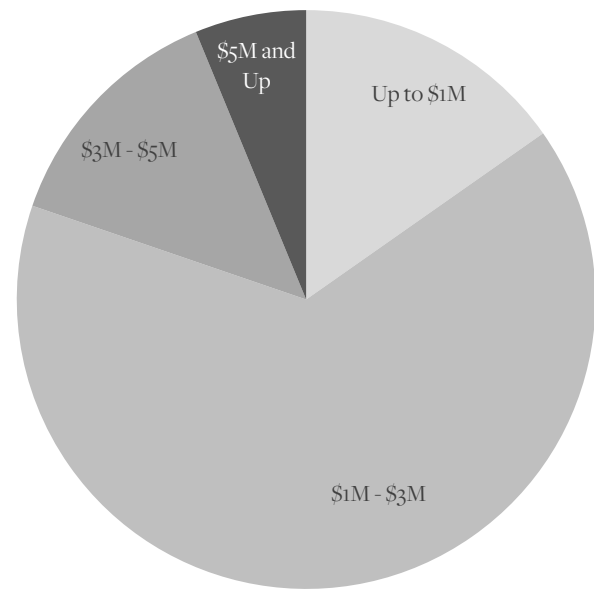
# The Peninsula

- MARKET SNAPSHOT
- ATHERTON
- BURLINGAME
- HILLSBOROUGH
- LOS ALTOS HILLS
- MENLO PARK
- WOODSIDE

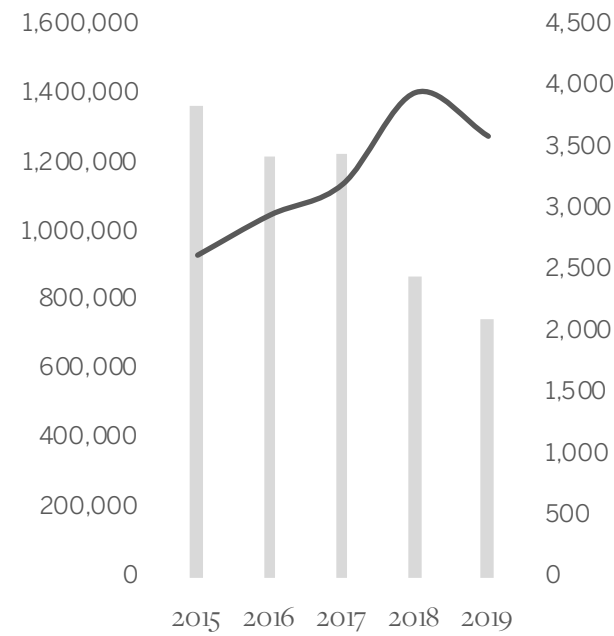


# The Peninsula

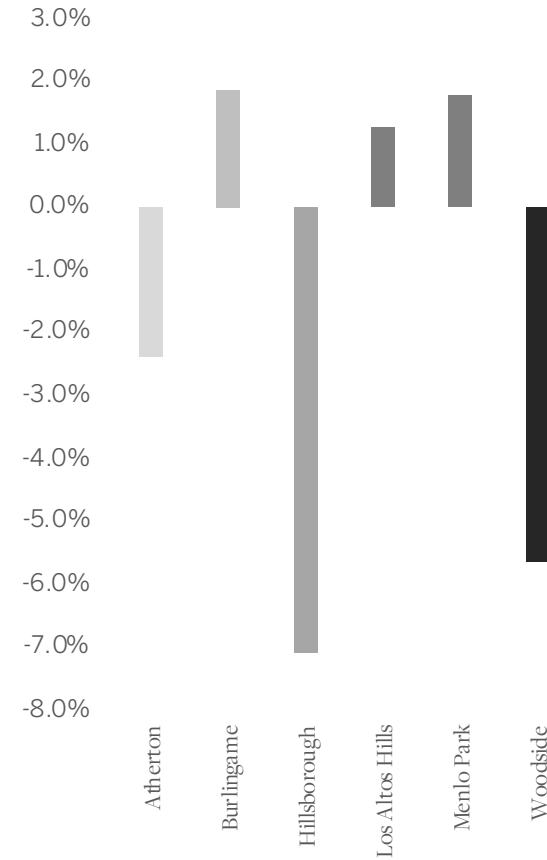
Market Snapshot



Sales Volume by Price Category



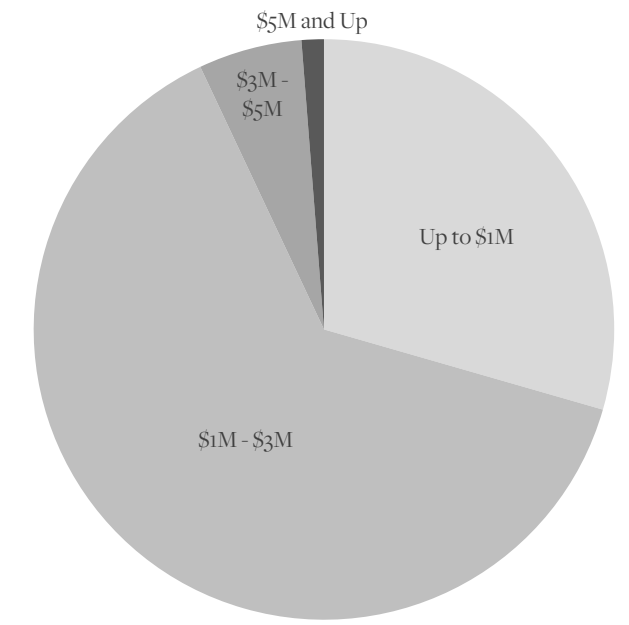
Median Sale Price vs. Total Units Sold



Final Sale vs. Original List

# Q1 2019 Highlights

The Peninsula



Total Units Sold by Price Category

- 15% Up to \$1 Million
- 65% \$1 Million to \$3 Million
- 14% \$3 Million to \$5 Million
- 6% \$5 Million and Up

- Median Sale Price
- Total Units Sold

- -2% Atherton
- 2% Burlingame
- -7% Hillsborough
- 1% Los Altos Hills
- 2% Menlo Park
- -6% Woodside

- 29% Up to \$1 Million
- 64% \$1 Million to \$3 Million
- 6% \$3 Million to \$5 Million
- 1% \$5 Million and Up

{2019}

## at a glance

ATHERTON

# 10

Units Sold

# 11%

Change in Units Sold  
{ 2019 vs. 2018 }

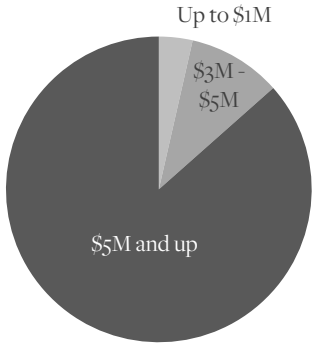
# \$5.8m

Median Sale Price

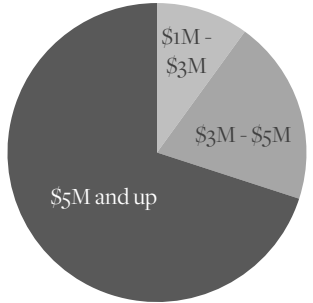
# -32%

Change in Median Sale Price  
{ 2019 vs. 2018 }

Sales Volume by Price Category

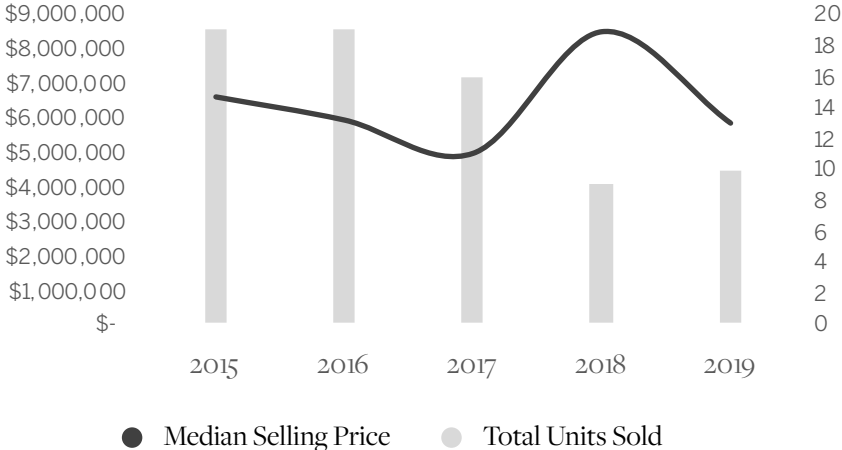


Total Units Sold by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }					
Change	-31%	11%	17%	-	46%
2019	\$5,837,000	10	\$1,676	-2%	36
2018	\$8,500,000	9	\$1,427	2%	25
2017	\$4,957,500	16	\$1,341	-4%	37
2016	\$5,925,000	19	\$1,455	-3%	49
2015	\$6,600,000	19	\$1,223	-2%	50

Median Sale Price | Total Units Sold

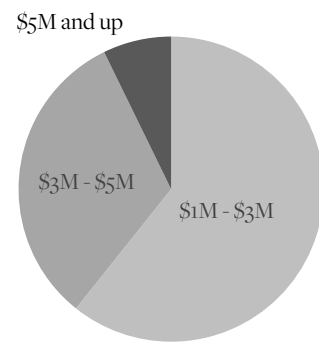




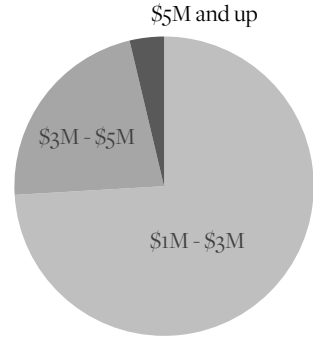
# Burlingame

Single Family Home Sales

Sales Volume by Price Category

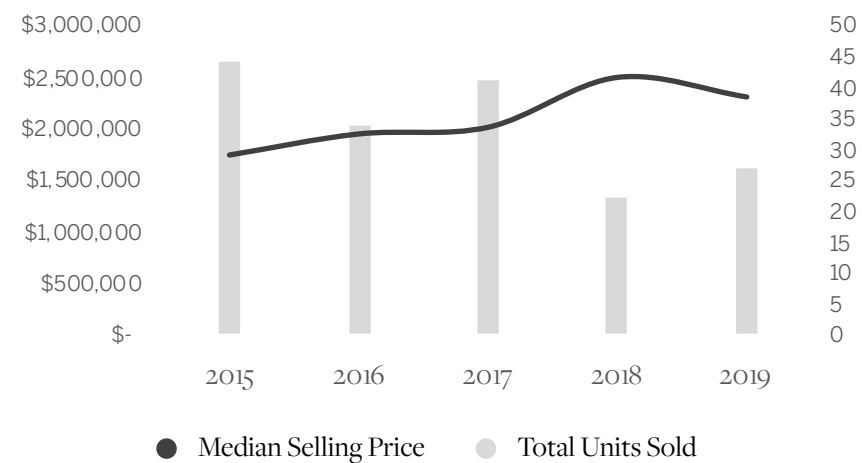


Total Units Sold by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	-8%	23%	-10%	-	-43%
2019	\$2,310,000	27	\$1,062	2%	11
2018	\$2,500,440	22	\$1,174	11%	19
2017	\$2,015,000	41	\$1,002	9%	23
2016	\$1,950,000	34	\$965	7%	19
2015	\$1,745,000	44	\$904	9%	27

Median Sale Price | Total Units Sold



{2019}

## at a glance

BURLINGAME

27

Units Sold

23%

Change in Units Sold {2019 vs. 2018}

\$2.3m

Median Sale Price

-8%

Change in Median Sale Price {2019 vs. 2018}



{2019}  
**at a  
 glance**  
 HILLSBOROUGH

**10**

Units Sold

**-41%**

Change in Units Sold  
 { 2019 vs. 2018 }

**\$4m**

Median Sale Price

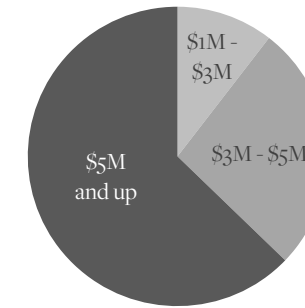
**-24%**

Change in Median Sale Price  
 { 2019 vs. 2018 }

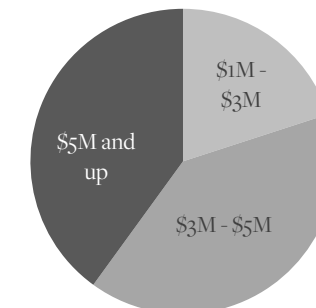
# Hillsborough

Single Family Homes Sales

Sales Volume  
 by Price Category

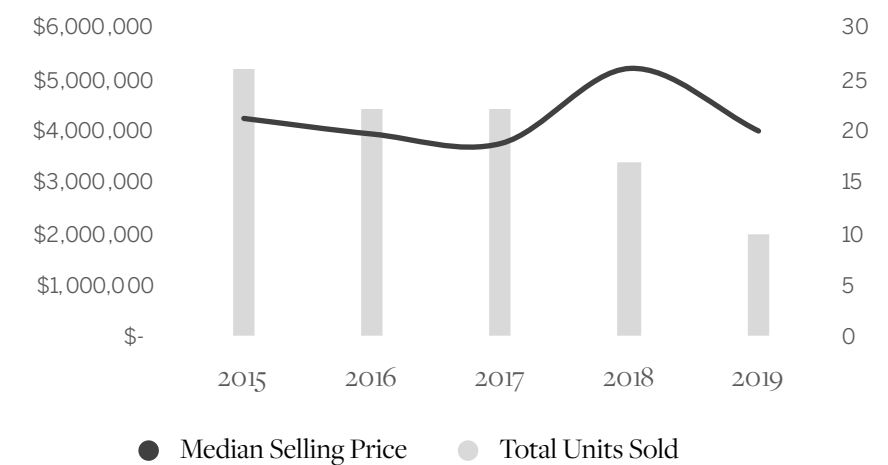


Total Units Sold  
 by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 } Change	-24%	-41%	-16%	-	113%
2019	\$3,995,000	10	\$1,164	-7%	42
2018	\$5,229,625	17	\$1,393	-1%	19
2017	\$3,750,000	22	\$1,049	0%	67
2016	\$3,934,000	22	\$1,071	0%	44
2015	\$4,242,500	26	\$1,051	0%	41

Median Sale Price | Total Units Sold

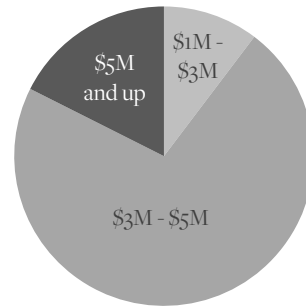




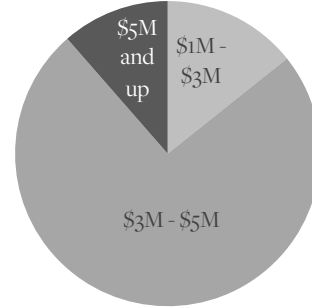
# Los Altos Hills

Single Family Home Sales

Sales Volume by Price Category



Total Units Sold by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018} Change	3%	-46%	-1%	-	40%
2019	\$3,725,000	35	\$1,358	1%	17
2018	\$3,630,000	65	\$1,368	11%	12
2017	\$3,100,000	96	\$1,190	3%	17
2016	\$2,962,500	74	\$1,115	5%	19
2015	\$3,146,000	98	\$1,123	9%	18

Median Sale Price | Total Units Sold



{2019}  
at a glance  
LOS ALTOS HILLS

35  
Units Sold

-46%  
Change in Units Sold  
{2019 vs. 2018}

\$3.7m  
Median Sale Price

3%  
Change in Median Sale Price  
{2019 vs. 2018}



# Menlo Park

Single Family Homes Sales

{2019 }

## at a glance

MENLO PARK

# 47

Units Sold

# 7%

Change in Units Sold  
{ 2019 vs. 2018 }

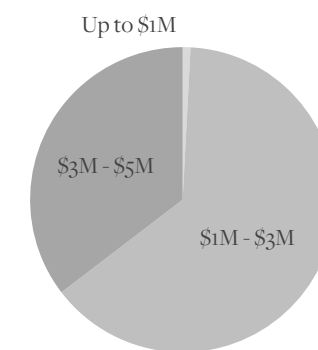
# \$2.5m

Median Sale Price

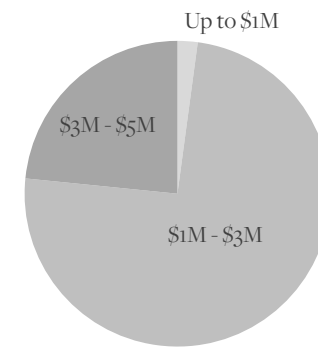
# -17%

Change in Median Sale Price  
{ 2019 vs. 2018 }

Sales Volume by Price Category

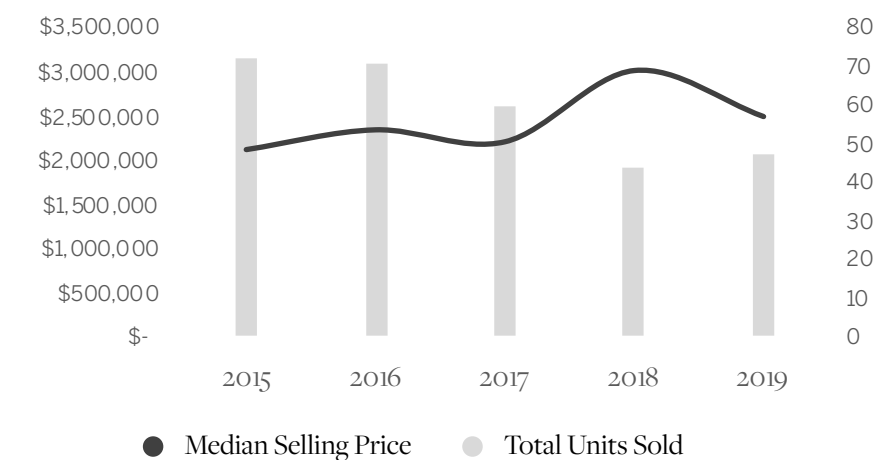


Total Units Sold by Price Category



	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{ 2019 vs. 2018 }	-17%	7%	-10%	-	68%
2019	\$2,500,000	47	\$1,274	2%	31
2018	\$3,020,000	44	\$1,415	10%	18
2017	\$2,215,000	60	\$1,188	3%	26
2016	\$2,350,000	71	\$1,156	5%	16
2015	\$2,126,500	72	\$1,105	9%	14

Median Sale Price | Total Units Sold

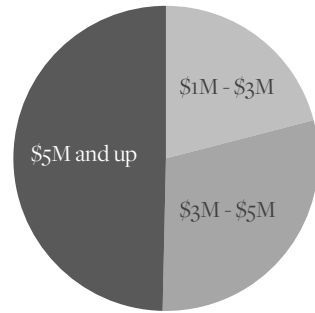




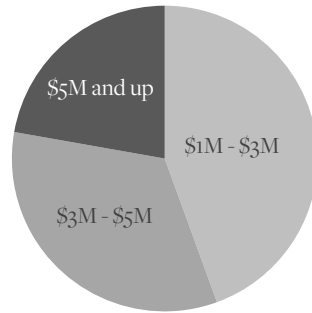
# Woodside

Single Family Home Sales

Sales Volume by Price Category



Total Units Sold by Price Category



{2019 }

## at a glance

WOODSIDE

	Median Sale Price	Total Units Sold	Average Price Per Sq. Ft.	Median Sale vs. Original List	Average Days on Market
{2019 vs. 2018 }	18%	0%	22%	-	-34%
2019	\$3,300,000	9	\$1,313	-6%	33
2018	\$2,800,000	9	\$1,079	1%	49
2017	\$1,674,000	5	\$691	-3%	74
2016	\$4,000,000	17	\$1,082	-4%	77
2015	\$2,500,000	15	\$878	-4%	88

9

Units Sold

0%

Change in Units Sold  
{2019 vs. 2018 }

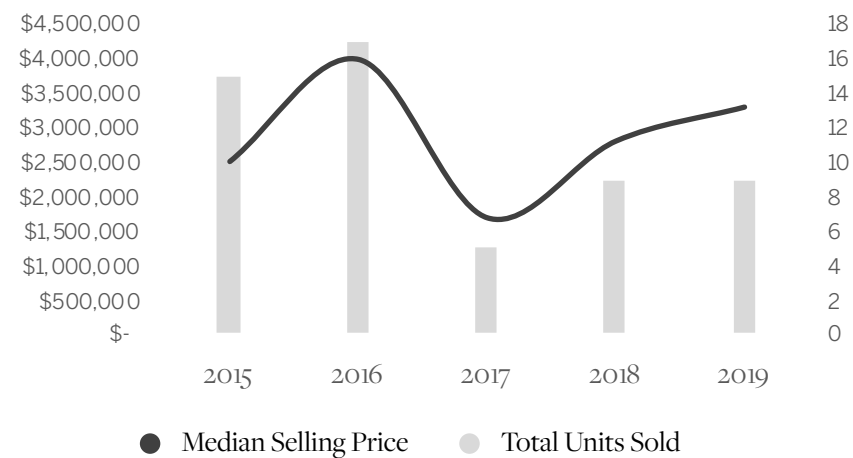
\$3.3m

Median Sale Price

18%

Change in Median Sale Price  
{2019 vs. 2018 }

Median Sale Price | Total Units Sold





THE PENINSULA

# Extraordinary Results

*We celebrate the notable success of our associates and clients*



HILLSBOROUGH  
Elegant Hillsborough Estate  
Last Asking \$9,988,000



LOS ALTOS HILLS  
Indoor/Outdoor Luxury Lifestyle  
Last Asking \$6,488,000

PALO ALTO  
Extraordinary Modern Craftsman  
Last Asking \$5,798,000

BELMONT  
Luxuriously Renovated Belmont Home  
Last Asking \$2,499,000

SAN CARLOS  
San Carlos Living With High End Upgrades  
Last Asking \$2,088,000

\*IN ORDER FROM LEFT TO RIGHT, TOP TO BOTTOM

[SOTHEBYSHOMES.COM/SANFRANCISCO](https://www.sotthebyshomes.com/sanfrancisco)



# UNRIVALED GLOBAL PERFORMANCE

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**\$112 BILLION**

ANOTHER RECORD YEAR IN  
ANNUAL GLOBAL SALES IN 2018

---

**990 22,500 72**

OFFICES

AGENTS

COUNTRIES

---

**1 OUT  
OF 3**

OFFICES IS OUTSIDE  
OF THE UNITED STATES

---

**31 MILLION**

VISITS TO [SOTHEBYSREALTY.COM](https://www.sothebysrealty.com)  
13% INCREASE YEAR OVER YEAR

---

**180,000**

YOUTUBE SUBSCRIBERS  
SILVER CREATOR AWARD WINNER

---

**Sotheby's**

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