

TW 4 2018

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TRILLIUMWEST
QUARTERLY DATA REPORT

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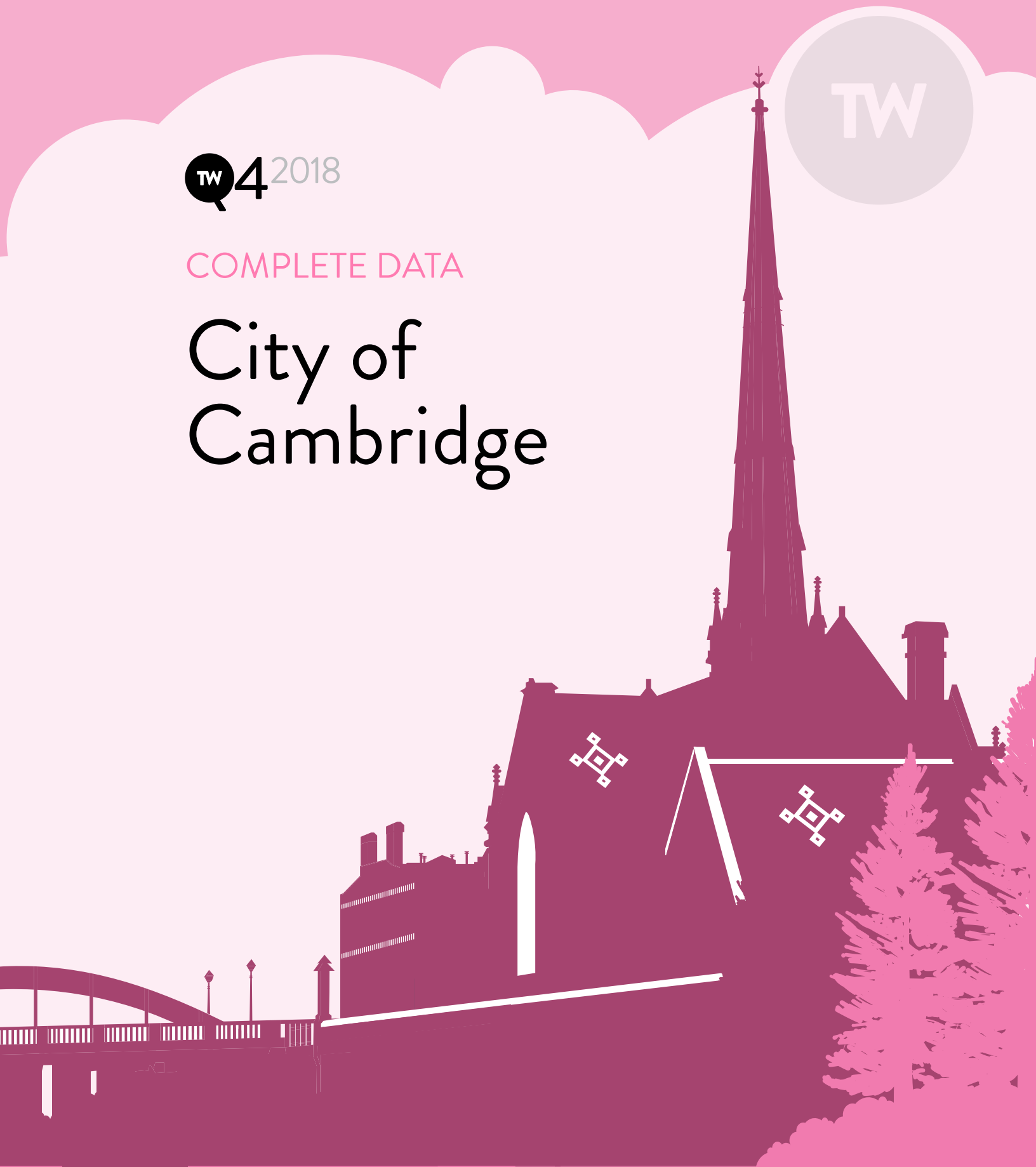
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COMPLETE DATA

City of Cambridge



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

City of Cambridge

Q4 | SALES TO

new listing ratio

A time of year typically short on inventory, this lead indicator rose back up again. Seller's were still in control.

0.81

INSIDE THE NUMBERS

Regional prices increase & the value gap in Cambridge still exists.

Everything is relative, and our Regional real estate market is no exception. Although Cambridge saw a fairly modest 5.9% Y/Y increase in median sale price, the numbers and the geography say there is still plenty of room for growth in 2019.

With a detached median sale price 8.6% less expensive than KW and that lovely proximity for many to the 401, we see things getting only hotter this year in Cambridge. Only 4% away from the milestone 500k median detached sale price, we see that happening prior to the end of Q2 2019.

A slow down in the Q1 new housing supply will only facilitate the rise upward in pricing. The already scorching 0.81 sales to new listing ratio should have no where to go but up.

* For a reference to calculations, visit <http://www.trilliumwest.com/knowledge/market-data/>

	Q4 2018	% Chg (Y)	Q4 2017	% Chg (Q)	Q3 2018
MEDIAN DET. SALE PRICE	\$480,000	5.9% ▲	\$453,425	1.1% ▲	\$475,000
NUMBER OF NEW SALES	410	8.1% ▼	446	7.2% ▼	442
MEDIAN DAYS ON MARKET	18	1 day ▲	17	1 day ▼	19
NEW INVENTORY	509	5.9% ▼	541	28.1% ▼	708

UP & DOWN quick review

▲14%

Y/Y increase in West Galt median sale price. No pause button for the hottest area in Cambridge.

▼11%

Q/Q decrease in North Galt median sale price. An anomaly? That 4.4% Y/Y reduction says no.

▲57%

Q/Q increase in the Hespeler sales/new listing ratio. The yuletide love flowed right until the very end of Q4.

▼5%

Y/Y decrease in the West Galt sales to new listing ratio. Still a sellers market, but the lowest in the city.

▲9%

Y/Y increase in the Preston median sale price. The most 'affordable' area in town got a little less so for some.

▼23%

Y/Y decrease in volume of sales in Hespeler. As the supply numbers drastically dwindle, so do sales.

▲6%

Y/Y increase in the Hespeler median sale price. That monumental 500k threshold is on the horizon.

▼1%

Q/Q in Preston median sale price. Tucked under 400k, this is still your Regional value play.

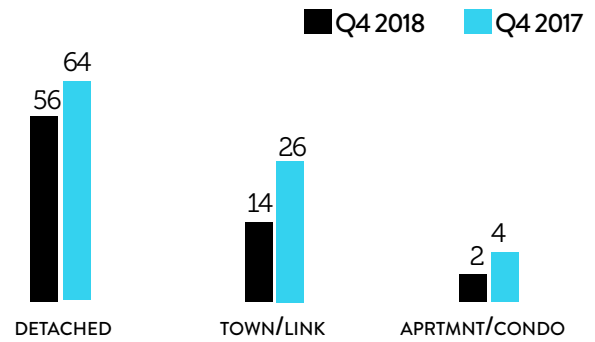
HESPELER CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$489,695	72	77	0.94	\$497,500
Q4 2017 TOTAL	\$494,394	94	106	0.89	\$469,750
% CHANGE (+/-)	1% ▼	23.4% ▼	27.3% ▼	5.6% ▲	6% ▲
Q3 2018 TOTAL	\$534,900	78	131	0.60	\$467,500
% CHANGE (+/-)	8.5% ▼	7.6% ▼	41.6% ▼	56.7% ▲	6.4% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	52	75	▼
TOWN/LINK HOMES	22	26	▼
APARTMENT/CONDO	3	5	▼
TOTAL	77	106	▼
SALES TO NEW RATIO	0.94	0.89	▲

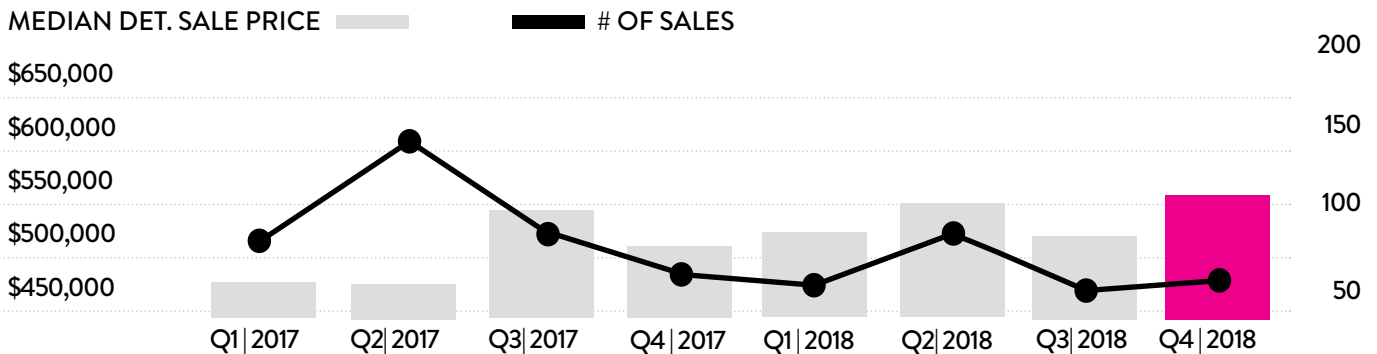
Q4 SALES BY INVENTORY TYPE



\$544,963
DETACHED MEDIAN SALE

\$393,750
TOWN/LINK MEDIAN SALE

\$262,950
APMNT/CONDO MEDIAN SALE



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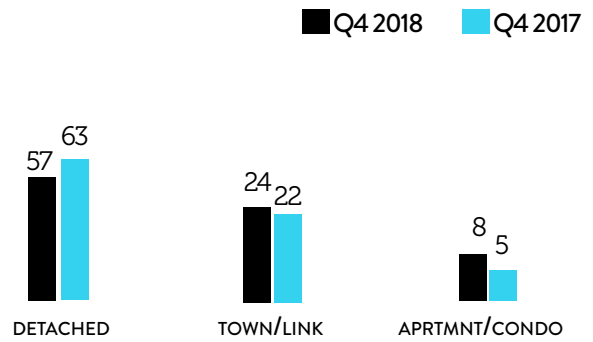
PRESTON CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$449,900	89	112	0.79	\$399,000
Q4 2017 TOTAL	\$389,900	90	95	0.95	\$365,000
% CHANGE (+/-)	15.4% ▲	1.1% ▼	17.9% ▲	16% ▼	9.3% ▲
Q3 2018 TOTAL	\$429,000	95	153	0.62	\$400,900
% CHANGE (+/-)	9.1% ▼	5.2% ▼	26.8% ▼	27.4% ▲	0.5% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	82	69	▲
TOWN/LINK HOMES	20	23	▼
APARTMENT/CONDO	10	3	▲
TOTAL	112	95	▲
SALES TO NEW RATIO	0.79	0.95	▼

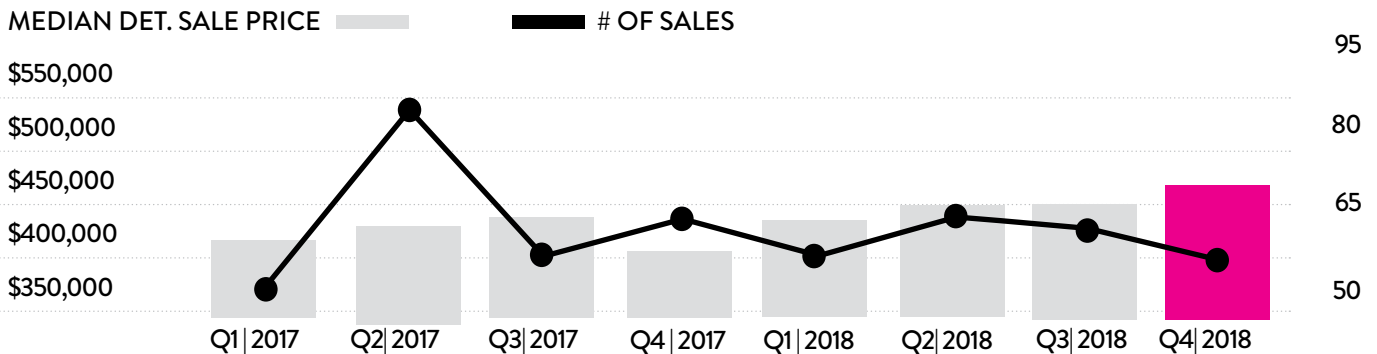
Q4 SALES BY INVENTORY TYPE



\$435,000
DETACHED MEDIAN SALE

\$366,750
TOWN/LINK MEDIAN SALE

\$352,450
APMNT/CONDO MEDIAN SALE



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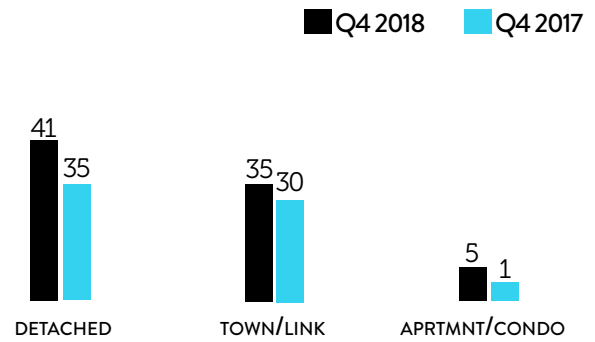
NORTH GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$469,900	81	91	0.89	\$412,500
Q4 2017 TOTAL	\$499,900	66	77	0.86	\$431,620
% CHANGE (+/-)	6% ▼	22.7% ▲	18.1% ▲	3.4% ▲	4.4% ▼
Q3 2018 TOTAL	\$499,900	92	134	0.69	\$465,000
% CHANGE (+/-)	6% ▼	12.9% ▼	32% ▼	28.9% ▲	11.3% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	52	41	▲
TOWN/LINK HOMES	34	35	▼
APARTMENT/CONDO	5	1	▲
TOTAL	91	77	▲
SALES TO NEW RATIO	0.89	0.86	▲

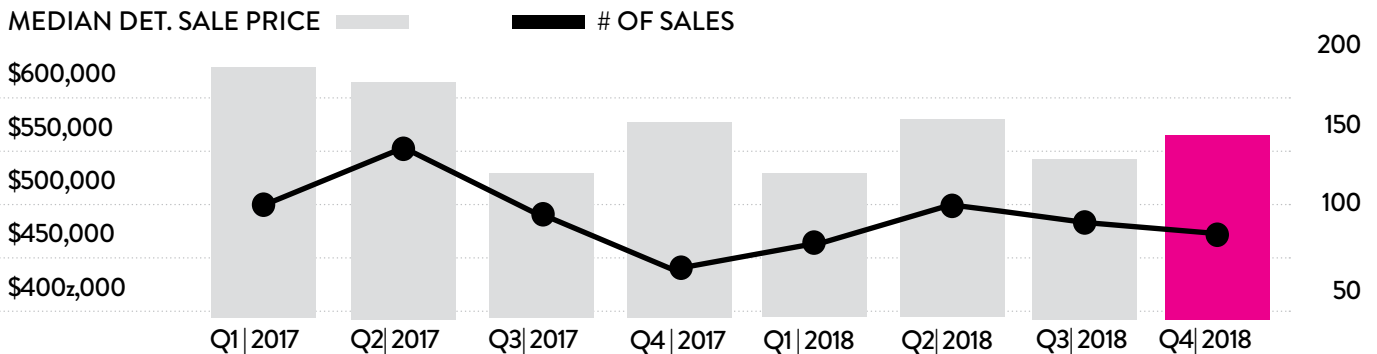
Q4 SALES BY INVENTORY TYPE



\$550,000
DETACHED MEDIAN SALE

\$350,000
TOWN/LINK MEDIAN SALE

\$379,900
APMNT/CONDO MEDIAN SALE



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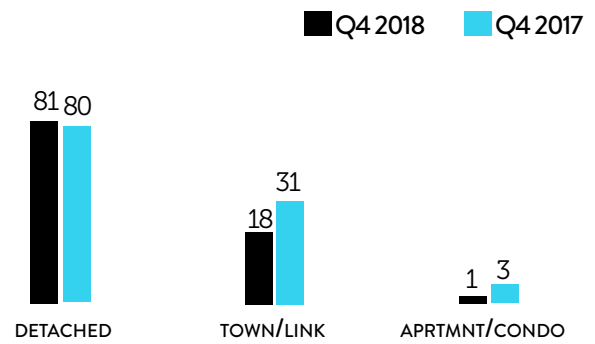
EAST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$469,900	100	133	0.75	\$414,250
Q4 2017 TOTAL	\$409,000	114	143	0.80	\$395,000
% CHANGE (+/-)	14.8% ▲	12.2% ▼	6.9% ▼	6.2% ▼	4.8% ▲
Q3 2018 TOTAL	\$429,900	123	184	0.67	\$415,000
% CHANGE (+/-)	9.3% ▲	18.6% ▼	27.7% ▼	11.9% ▲	0.1% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	109	101	▲
TOWN/LINK HOMES	23	35	▼
APARTMENT/CONDO	1	7	▼
TOTAL	133	143	▼
SALES TO NEW RATIO	0.75	0.80	▼

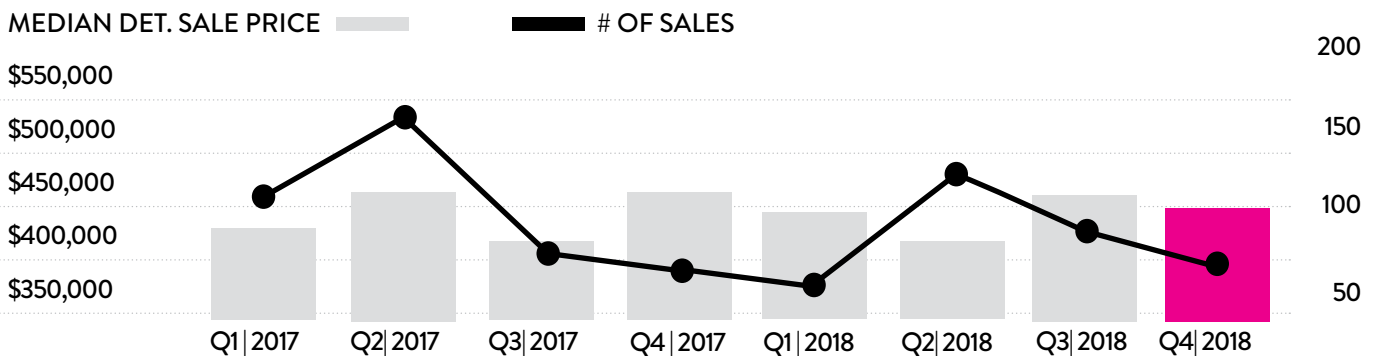
Q4 SALES BY INVENTORY TYPE



\$422,000
DETACHED MEDIAN SALE

\$390,000
TOWN/LINK MEDIAN SALE

\$370,000
APMNT/CONDO MEDIAN SALE



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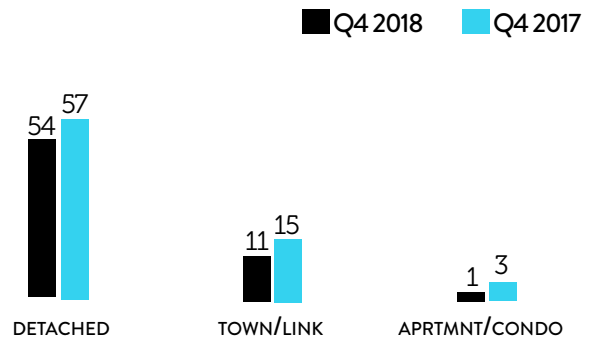
WEST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$494,900	66	89	0.74	\$471,500
Q4 2017 TOTAL	\$419,900	75	96	0.78	\$415,000
% CHANGE (+/-)	178% ▲	12% ▼	72% ▼	5.1% ▼	13.6% ▲
Q3 2018 TOTAL	\$577,400	55	106	0.52	\$475,000
% CHANGE (+/-)	14.2% ▼	20% ▲	16% ▼	11.4% ▲	0.7% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	73	67	▲
TOWN/LINK HOMES	13	15	▼
APARTMENT/CONDO	3	14	▼
TOTAL	89	96	▼
SALES TO NEW RATIO	0.74	0.78	▼

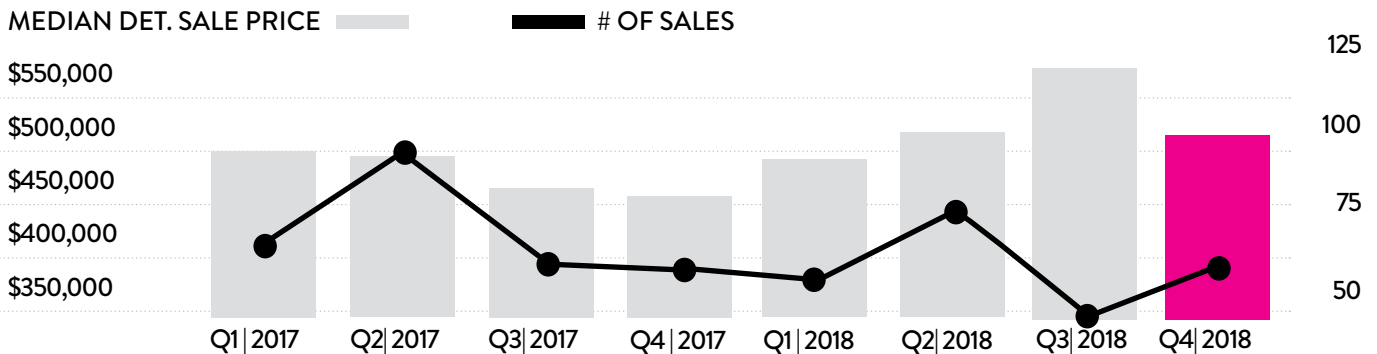
Q4 SALES BY INVENTORY TYPE



\$501,250
DETACHED MEDIAN SALE

\$416,000
TOWN/LINK MEDIAN SALE

\$256,500
APMNT/CONDO MEDIAN SALE



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COMPLETE DATA

City of Guelph



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Q4 | SALES TO

new listing ratio

A time of year typically short on inventory, this lead indicator rose back up again. Seller's were still in control.

0.84

INSIDE THE NUMBERS

The calm after the storm. It's a typical Guelph thing.

As we move a full year past the up and down and flurry and resulting famine of 2017, we finally have a complete picture of the new Guelph real estate landscape. And it is exactly what we predicted it would be - back to normal.

The heavily affected perimeter areas of the city have returned to a more balanced state as sellers aligned their respective pricing strategies with buyer expectations. While sale prices may still be off high water marks by as much as 6% in some areas, demand continues to outpace supply. The 0.84 sales to new listing ratio is still the highest in the entire region.

For those seeking a more calculated purchase, the uber-consistent Downtown Guelph market did what it usually does - it stayed a measured upward course.

* For a reference to calculations, visit <http://www.trilliumwest.com/knowledge/market-data/>

	Q4 2018	% Chg (Y)	Q4 2017	% Chg (Q)	Q3 2018
MEDIAN DET. SALE PRICE	\$565,250	4.6% ▲	\$540,000	0.9% ▲	\$560,000
NUMBER OF NEW SALES	408	8.3% ▼	445	28.4% ▼	550
MEDIAN DAYS ON MARKET	21	1 day ▲	20	4 days ▲	17
NEW INVENTORY	487	2.6% ▼	500	40.6% ▼	820

UP & DOWN quick review

▲11%

Y/Y increase in Downtown median sale price. The most reliable sub-market stayed on point.

▼6%

Y/Y decrease in South Guelph median sale price. Still a little work to do on the road back from '17.

▲25%

Q/Q increase in Midtown sales to new listing ratio. We see this holding through investment season in Q1.

▼33%

Q/Q reduction in West Guelph new inventory. Resulting in a 10.1% increase in median sale price.

▲10%

Q/Q increase in West Guelph median sale price. That big 500k threshold returns to the horizon for 2019.

▼12%

Y/Y reduction in Downtown new inventory. The always tight market in the core got even scrappier.

▲52%

Q/Q increase in North Guelph sales to new listing ratio. Buyers rediscover value at the top of the city.

▼42%

Q/Q drop in East Guelph sales volume. The Y/Y numbers fell as well, something to watch in Q1.

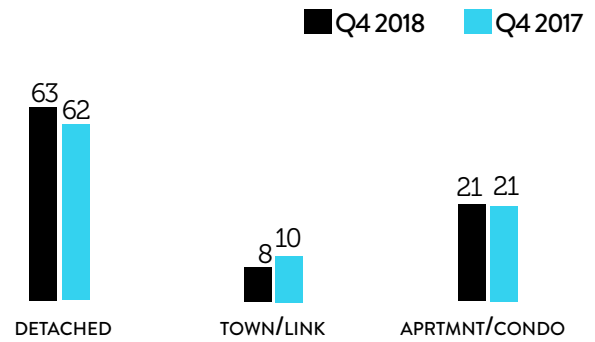
DOWNTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$507,450	92	101	0.90	\$477,500
Q4 2017 TOTAL	\$439,900	93	116	0.80	\$429,900
% CHANGE (+/-)	15.4% ▲	1.1% ▼	12.1% ▼	11.1% ▲	11.1% ▲
Q3 2018 TOTAL	\$489,900	111	163	0.68	\$465,000
% CHANGE (+/-)	3.6% ▲	17.1% ▼	37.4% ▼	32.4% ▲	2.7% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	69	81	▼
TOWN/LINK HOMES	14	12	▲
APARTMENT/CONDO	18	23	▼
TOTAL	101	116	▼
SALES TO NEW RATIO	0.90	0.80	▲

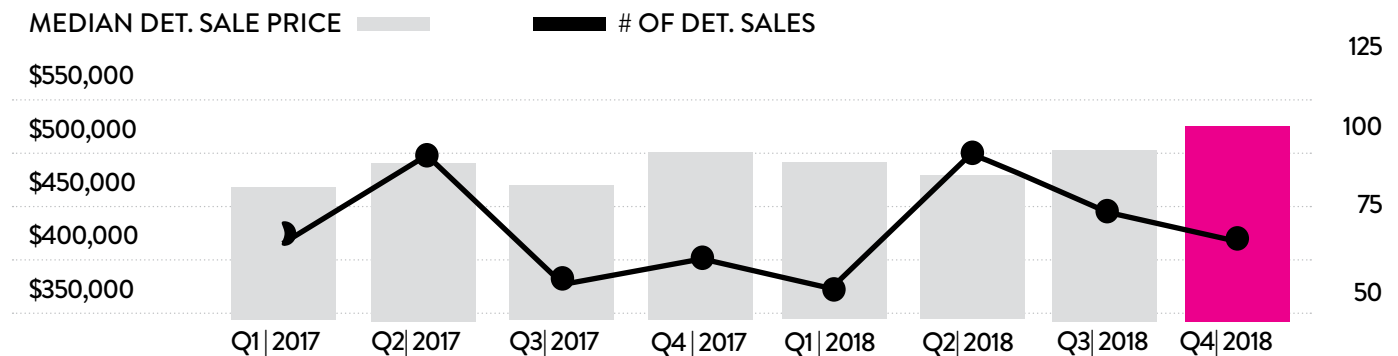
Q4 SALES BY INVENTORY TYPE



\$446,400
DETACHED MEDIAN SALE

\$408,000
TOWN/LINK MEDIAN SALE

\$285,000
APMNT/CONDO MEDIAN SALE



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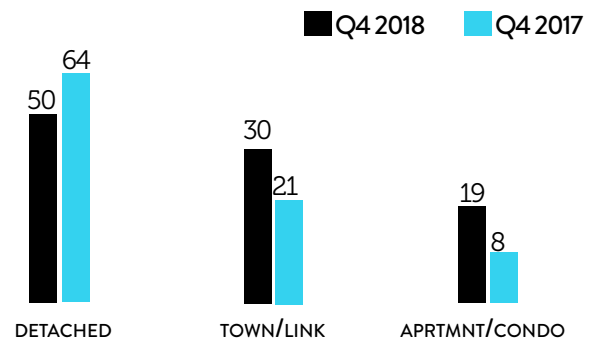
MIDTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$579,900	99	123	0.80	\$507,500
Q4 2017 TOTAL	\$506,500	93	108	0.86	\$525,000
% CHANGE (+/-)	14.5% ▲	6.5% ▲	13.9% ▲	7% ▼	3.3% ▼
Q3 2018 TOTAL	\$554,900	127	197	0.64	\$491,000
% CHANGE (+/-)	4.5% ▲	22% ▼	37.6% ▼	25% ▲	3.4% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	70	64	▲
TOWN/LINK HOMES	35	28	▲
APARTMENT/CONDO	18	16	▲
TOTAL	123	108	▲
SALES TO NEW RATIO	0.80	0.86	▼

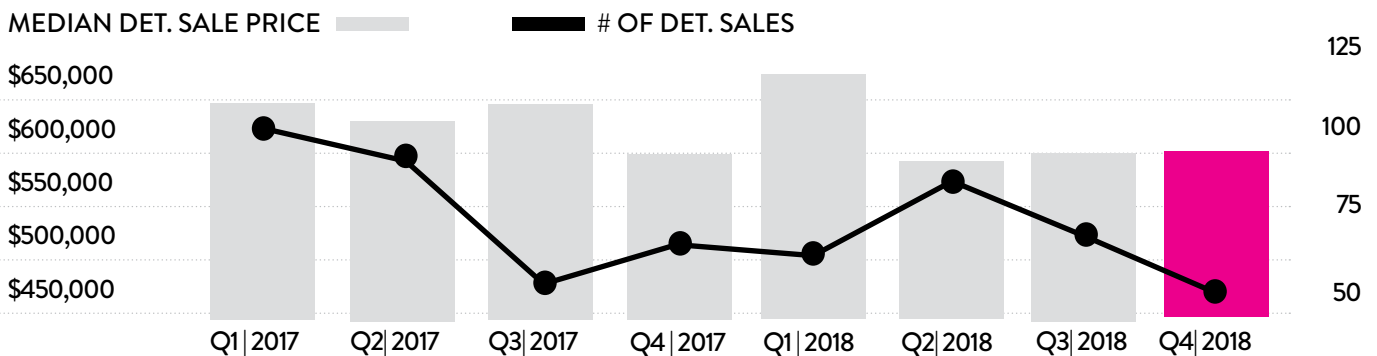
Q4 SALES BY INVENTORY TYPE



\$599,000
DETACHED MEDIAN SALE

\$465,000
TOWN/LINK MEDIAN SALE

\$302,000
APMNT/CONDO MEDIAN SALE



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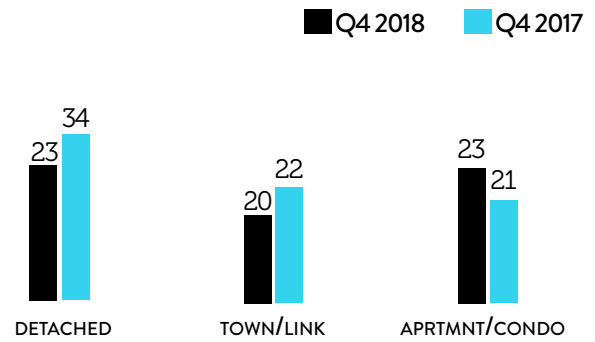
SOUTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$500,000	66	79	0.84	\$471,500
Q4 2017 TOTAL	\$505,200	77	86	0.90	\$500,500
% CHANGE (+/-)	1% ▼	14.3% ▼	8.1% ▼	6.7% ▼	5.8% ▼
Q3 2018 TOTAL	\$599,500	87	151	0.58	\$485,000
% CHANGE (+/-)	16.5% ▼	24.1% ▼	47.7% ▼	44.8% ▲	2.8% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	34	35	▼
TOWN/LINK HOMES	17	29	▼
APARTMENT/CONDO	28	22	▲
TOTAL	79	86	▼
SALES TO NEW RATIO	0.84	0.90	▼

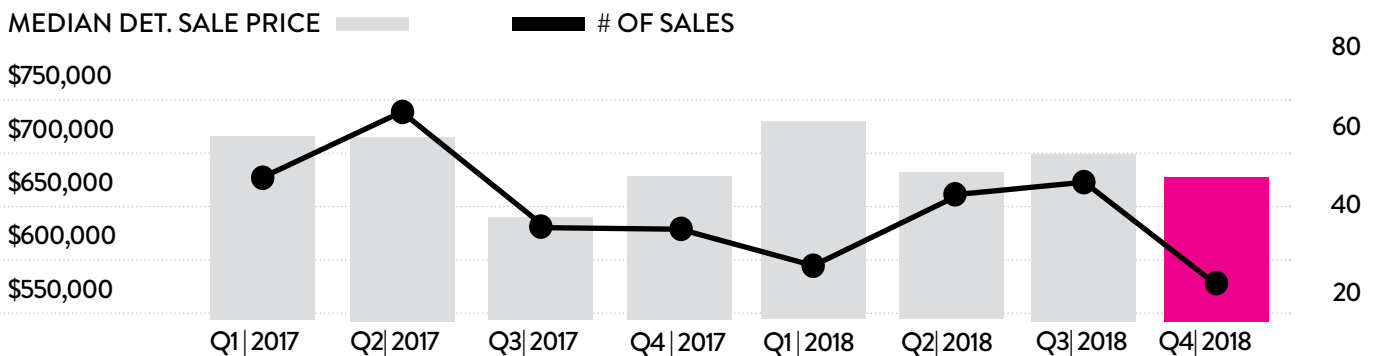
Q4 SALES BY INVENTORY TYPE



\$656,750
DETACHED MEDIAN SALE

\$471,500
TOWN/LINK MEDIAN SALE

\$330,000
APMNT/CONDO MEDIAN SALE



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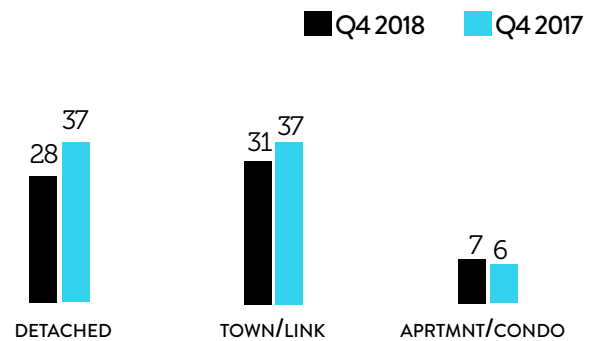
EAST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$501,390	66	81	0.81	\$469,500
Q4 2017 TOTAL	\$439,500	80	89	0.90	\$437,250
% CHANGE (+/-)	14.1% ▲	17.5% ▼	8.9% ▼	10% ▼	7.3% ▲
Q3 2018 TOTAL	\$489,900	113	129	0.88	\$482,000
% CHANGE (+/-)	2.3% ▲	41.5% ▼	37.2% ▼	7.9% ▼	2.5% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	39	39	=
TOWN/LINK HOMES	33	35	▼
APARTMENT/CONDO	9	15	▼
TOTAL	81	89	▼
SALES TO NEW RATIO	0.81	0.90	▼

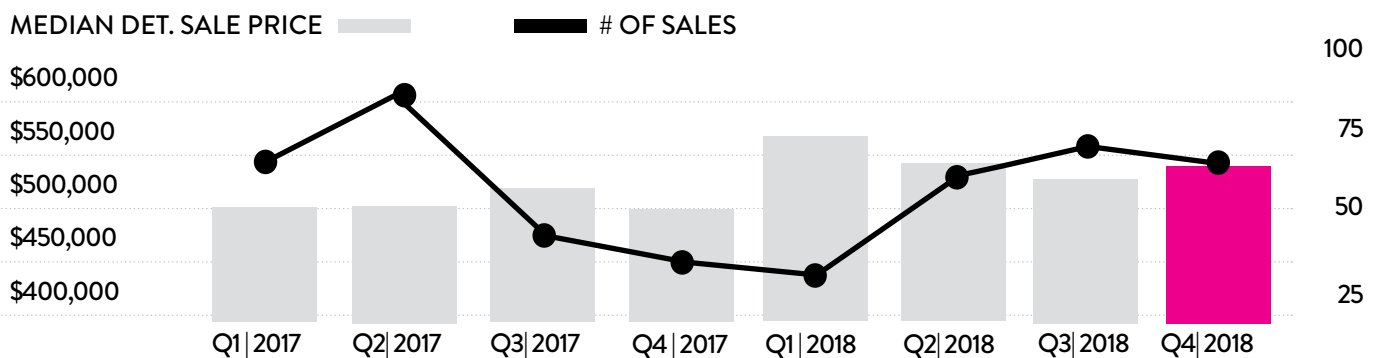
Q4 SALES BY INVENTORY TYPE



\$515,950
DETACHED MEDIAN SALE

\$460,000
TOWN/LINK MEDIAN SALE

\$334,900
APMNT/CONDO MEDIAN SALE



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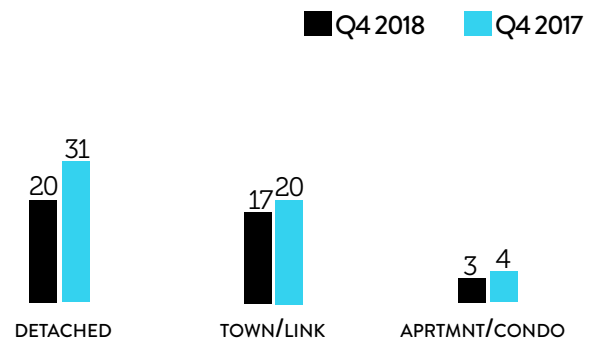
WEST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$549,500	40	46	0.87	\$491,000
Q4 2017 TOTAL	\$492,450	75	76	0.99	\$485,000
% CHANGE (+/-)	11.5% ▲	46.6% ▼	39.4% ▼	12.1% ▼	1.2% ▲
Q3 2018 TOTAL	\$487,250	60	94	0.64	\$445,750
% CHANGE (+/-)	12.7% ▲	33.3% ▼	51% ▼	35.9% ▲	10.1% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	29	48	▼
TOWN/LINK HOMES	14	19	▼
APARTMENT/CONDO	3	9	▼
TOTAL	46	76	▼
SALES TO NEW RATIO	0.87	0.99	▼

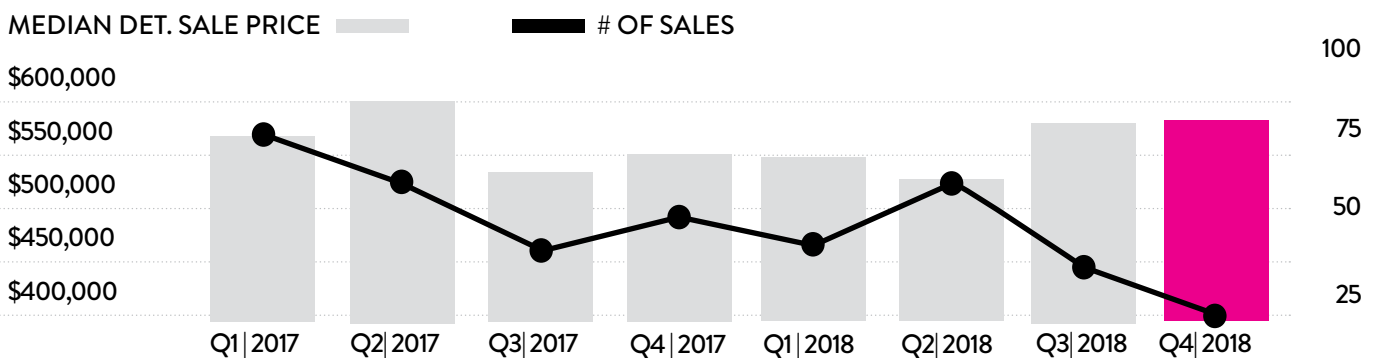
Q4 SALES BY INVENTORY TYPE



\$569,900
DETACHED MEDIAN SALE

\$414,400
TOWN/LINK MEDIAN SALE

\$241,300
APMNT/CONDO MEDIAN SALE



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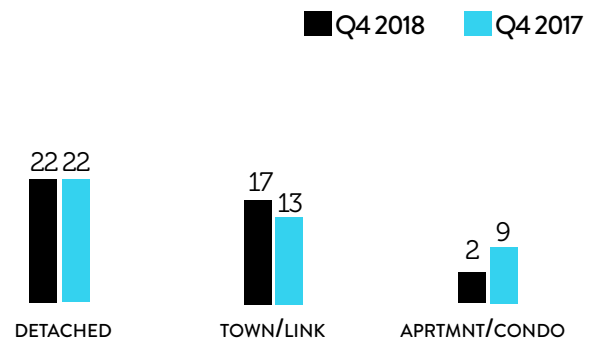
NORTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$450,000	41	45	0.91	\$425,000
Q4 2017 TOTAL	\$459,000	44	47	0.94	\$410,000
% CHANGE (+/-)	2% ▼	73% ▼	4.2% ▼	3.2% ▼	3.6% ▲
Q3 2018 TOTAL	\$464,950	52	86	0.60	\$463,750
% CHANGE (+/-)	3.2% ▼	21.1% ▼	47.7% ▼	51.6% ▲	8.3% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	25	22	▲
TOWN/LINK HOMES	13	13	=
APARTMENT/CONDO	7	9	▼
TOTAL	45	47	▼
SALES TO NEW RATIO	0.91	0.94	▼

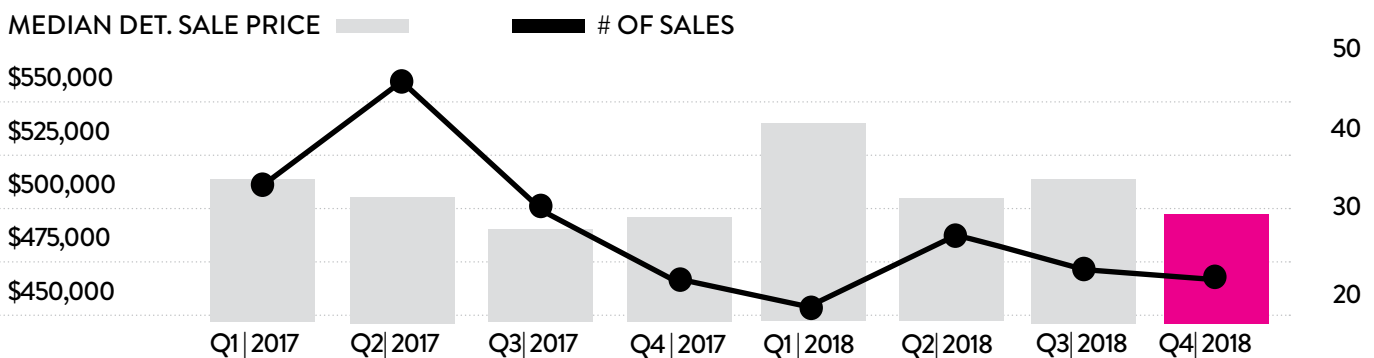
Q4 SALES BY INVENTORY TYPE



\$497,975
DETACHED MEDIAN SALE

\$372,500
TOWN/LINK MEDIAN SALE

\$397,500
APMNT/CONDO MEDIAN SALE



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4 2018

COMPLETE DATA

Cities of Kitchener + Waterloo



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

Cities of Kitchener + Waterloo

Q4 | SALES TO

new listing ratio

A time of year typically short on inventory, this lead indicator rose back up again. Seller's were still in control.

0.78

INSIDE THE NUMBERS

The move towards a more balanced market continues.

Big picture and the correct figures to focus on, keep that in mind as you sift through the yo-yo of numbers in KW real estate. From an outside perspective, the data is difficult to be too optimistic about headed into Q1, however; a little inside knowledge is needed here. 2017 was a year that saw fire and ice, depending on where you were and when. In the end, we are left with a market that weathered a most peculiar storm in pretty darn good shape.

The negative numbers produced some positive overall results. Y/Y and Q/Q reductions in sales volume saw commensurate drops in supply as well. The end result was a year-end market with an extremely healthy 0.73 sales to new listing ratio, Y/Y increases in median sale price across all sub-markets and overall median detached sale price increase of 10.5% Y/Y.

You did good KW, you did good.

* For a reference to calculations, visit <http://www.trilliumwest.com/knowledge/market-data/>

	Q4 2018	% Chg (Y)	Q4 2017	% Chg (Q)	Q3 2018
MEDIAN DET. SALE PRICE	\$525,000	10.5% ▲	\$475,000	=	\$525,000
NUMBER OF NEW SALES	1151	5.1% ▲	1095	12.1% ▼	1310
MEDIAN DAYS ON MARKET	17	2 days ▼	19	2 day ▲	15
NEW INVENTORY	1468	3.4% ▲	1420	26.1% ▼	1986

UP & DOWN quick review

▲11% Y/Y increase in West Kitchener median sale price. The biggest jump in the city and not slowing down.

▲61% Q/Q increase in the Downtown Kitchener sales to new listing ratio. A huge leap as new inventory subsides.

▲21% Q/Q increase in Uptown Waterloo sales volume. No holiday slow down for sellers seen here.

▲23% Y/Y increase in East Waterloo median list price. Market confidence took a big leap forward in 2018.

▼6% Q/Q decrease in West Waterloo median sale price. The volume was there, but sellers have adjusted their expectations.

▼13% Y/Y step back in Uptown Waterloo supply. Can't buy what isn't for sale and prices were forced up.

▼2% Q/Q reduction in East Waterloo median sale price. The big gains of previous Q's couldn't quite sustain.

▼33% Q/Q drop in Downtown Kitchener inventory. Ratios and prices went up as supply tightened in Q4.

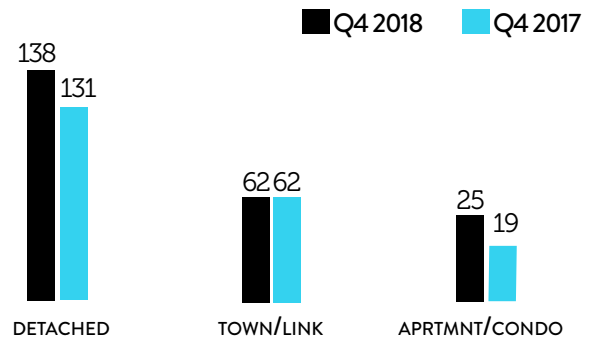
EAST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$457,000	225	264	0.85	\$438,000
Q4 2017 TOTAL	\$439,900	213	239	0.89	\$418,000
% CHANGE (+/-)	3.8% ▲	5.6% ▲	10.4% ▲	4.5% ▼	4.8% ▲
Q3 2018 TOTAL	\$459,900	267	395	0.68	\$447,900
% CHANGE (+/-)	0.6% ▼	15.7% ▼	33.1% ▼	25% ▲	2.2% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	174	160	▲
TOWN/LINK HOMES	66	61	▲
APARTMENT/CONDO	24	18	▲
TOTAL	264	239	▲
SALES TO NEW RATIO	0.85	0.89	▼

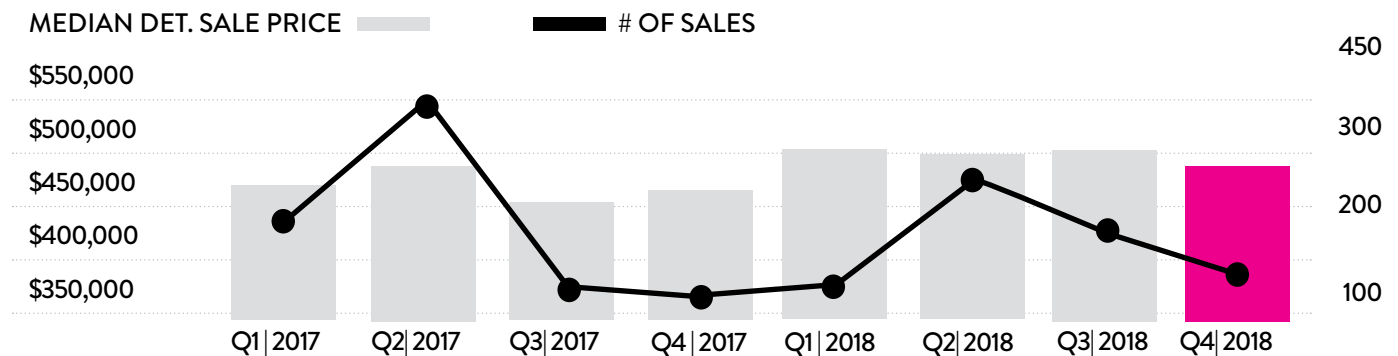
Q4 SALES BY INVENTORY TYPE



\$487,000
DETACHED MEDIAN SALE

\$368,750
TOWN/LINK MEDIAN SALE

\$240,000
APMNT/CONDO MEDIAN SALE



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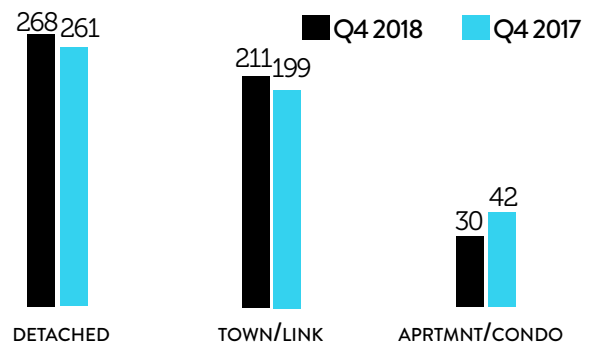
WEST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$459,900	509	653	0.78	\$432,000
Q4 2017 TOTAL	\$425,180	492	580	0.85	\$390,450
% CHANGE (+/-)	8.2% ▲	3.5% ▲	12.6% ▲	8.2% ▼	10.6% ▲
Q3 2018 TOTAL	\$469,900	563	835	0.67	\$430,000
% CHANGE (+/-)	2.1% ▼	9.6% ▼	21.8% ▼	16.4% ▲	0.5% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	370	342	▲
TOWN/LINK HOMES	240	203	▲
APARTMENT/CONDO	42	35	▲
TOTAL	653	580	▲
SALES TO NEW RATIO	0.78	0.85	▼

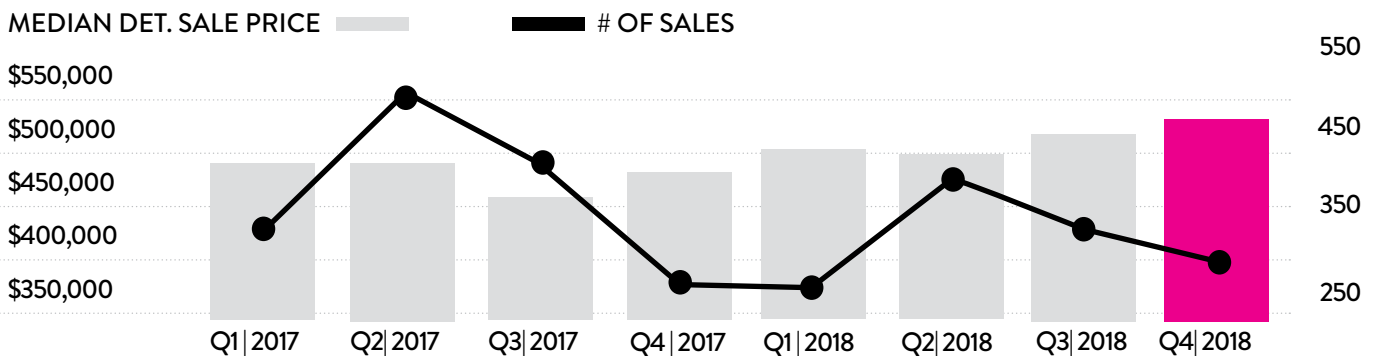
Q4 SALES BY INVENTORY TYPE



\$515,500
DETACHED MEDIAN SALE

\$369,000
TOWN/LINK MEDIAN SALE

\$258,500
APMNT/CONDO MEDIAN SALE



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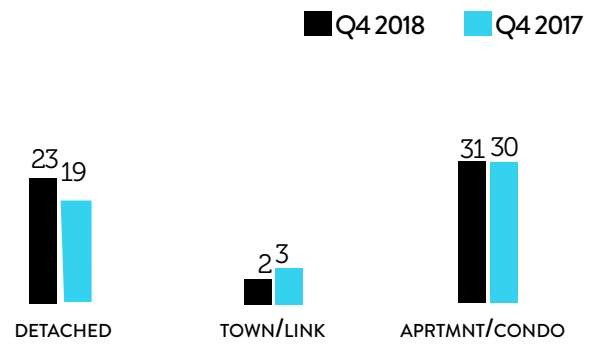
DOWNTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$383,950	56	68	0.82	\$377,450
Q4 2017 TOTAL	\$349,450	54	74	0.73	\$343,500
% CHANGE (+/-)	9.7% ▲	3.7% ▲	8.1% ▼	12.3% ▲	9.9% ▲
Q3 2018 TOTAL	\$400,000	52	101	0.51	\$369,000
% CHANGE (+/-)	4% ▼	7.7% ▲	32.7% ▼	60.8% ▲	2.3% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	29	25	▲
TOWN/LINK HOMES	4	2	▲
APARTMENT/CONDO	35	47	▼
TOTAL	68	74	▼
SALES TO NEW RATIO	0.82	0.73	▲

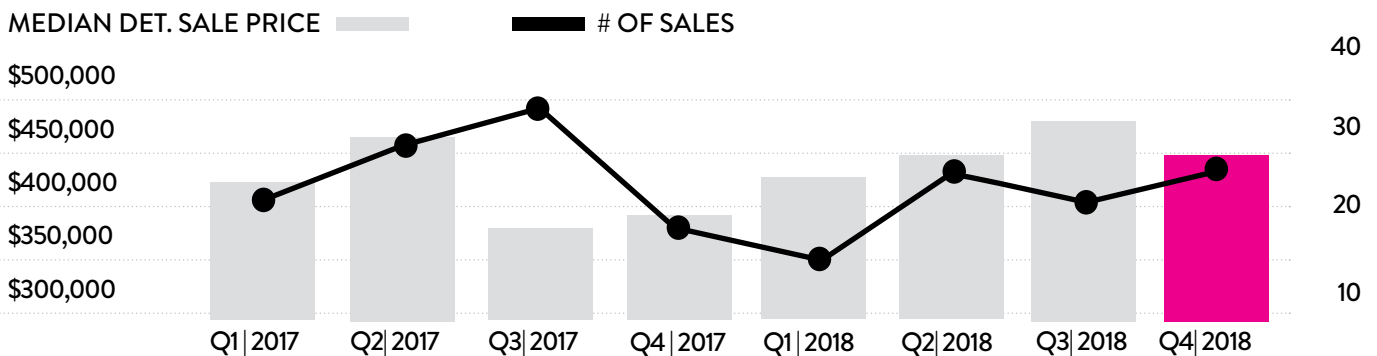
Q4 SALES BY INVENTORY TYPE



\$425,520
DETACHED MEDIAN SALE

\$298,950
TOWN/LINK MEDIAN SALE

\$275,000
APMNT/CONDO MEDIAN SALE



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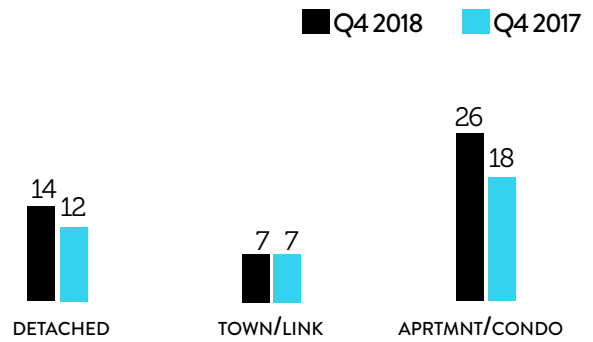
UPTOWN WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$463,950	47	52	0.90	\$450,000
Q4 2017 TOTAL	\$449,950	37	60	0.62	\$417,000
% CHANGE (+/-)	3.1% ▲	21.3% ▲	13.3% ▼	45.2% ▲	79% ▲
Q3 2018 TOTAL	\$464,900	47	81	0.58	\$430,000
% CHANGE (+/-)	0.2% ▼	=	35.8% ▼	55.2% ▲	4.6% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	18	24	▼
TOWN/LINK HOMES	7	8	▼
APARTMENT/CONDO	27	28	▼
TOTAL	52	60	▼
SALES TO NEW RATIO	0.90	0.62	▲

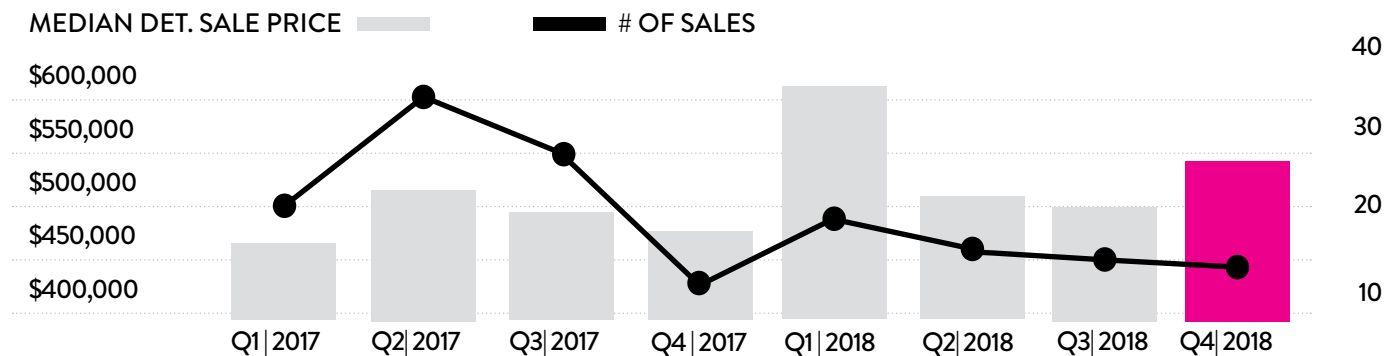
Q4 SALES BY INVENTORY TYPE



\$546,500
DETACHED MEDIAN SALE

\$379,000
TOWN/LINK MEDIAN SALE

\$427,500
APMNT/CONDO MEDIAN SALE



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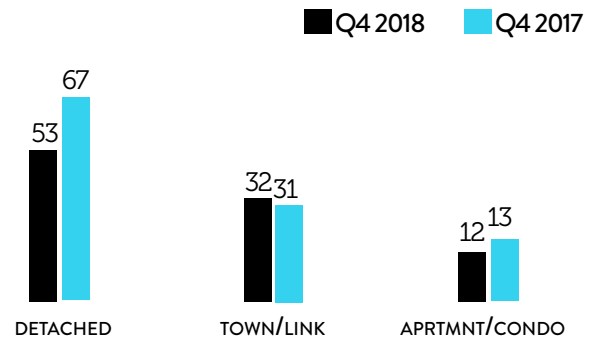
EAST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$539,900	97	127	0.76	\$465,000
Q4 2017 TOTAL	\$439,900	112	144	0.78	\$434,200
% CHANGE (+/-)	22.7% ▲	13.4% ▼	11.8% ▼	2.6% ▼	71% ▲
Q3 2018 TOTAL	\$487,000	107	149	0.72	\$476,000
% CHANGE (+/-)	10.9% ▲	9.3% ▼	14.8% ▼	5.5% ▲	2.3% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	76	75	▲
TOWN/LINK HOMES	32	44	▼
APARTMENT/CONDO	21	24	▼
TOTAL	127	144	▼
SALES TO NEW RATIO	0.76	0.78	▼

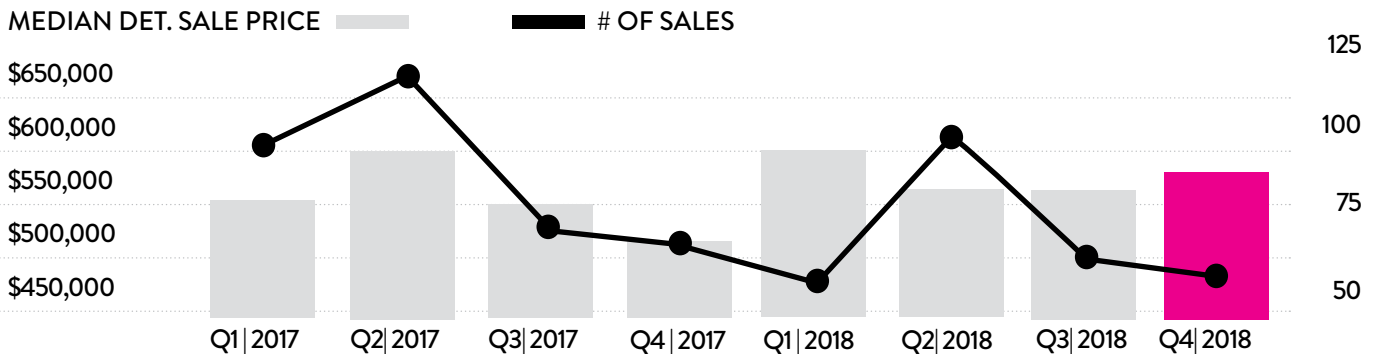
Q4 SALES BY INVENTORY TYPE



\$570,000
DETACHED MEDIAN SALE

\$403,750
TOWN/LINK MEDIAN SALE

\$235,250
APMNT/CONDO MEDIAN SALE



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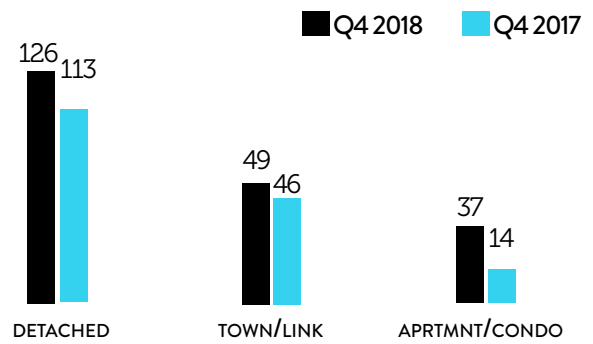
WEST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$519,000	214	293	0.73	\$487,500
Q4 2017 TOTAL	\$549,900	174	303	0.57	\$455,000
% CHANGE (+/-)	5.6% ▼	22.9% ▲	3.3% ▼	28% ▲	71% ▲
Q3 2018 TOTAL	\$559,900	248	383	0.65	\$511,500
% CHANGE (+/-)	7.3% ▼	13.7% ▼	25.4% ▼	12.3% ▲	6.4% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
DETACHED HOMES	175	209	▼
TOWN/LINK HOMES	56	54	▲
APARTMENT/CONDO	61	36	▲
TOTAL	293	303	▼
SALES TO NEW RATIO	0.73	0.57	▲

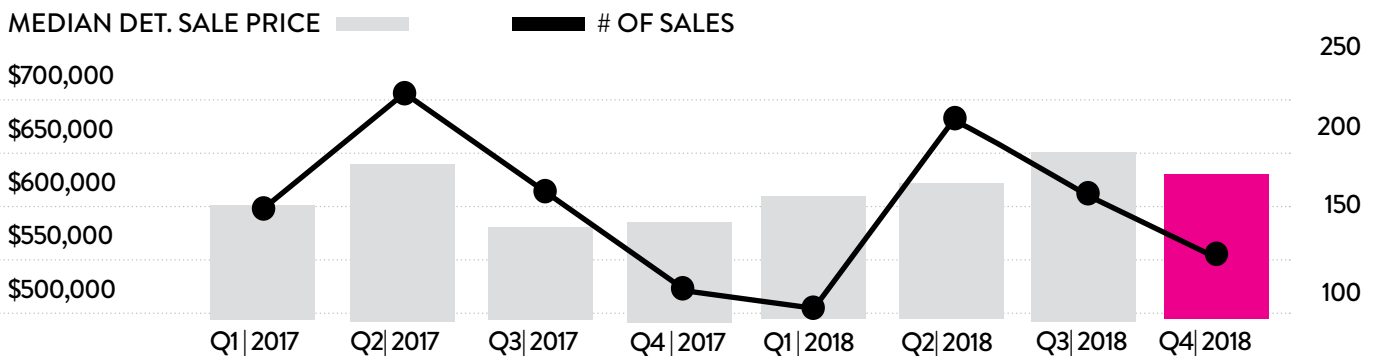
Q4 SALES BY INVENTORY TYPE



\$600,000
DETACHED MEDIAN SALE

\$372,500
TOWN/LINK MEDIAN SALE

\$324,800
APMNT/CONDO MEDIAN SALE



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TW



4 2018

COMPLETE DATA

The Townships



ELORA
MILL
INN

COMPLETE DATA

The Townships

INSIDE THE NUMBERS

A year to remember outside in the rural areas of the Region.

With limited sample sizes, the Township figures are always the most difficult to analyze, and especially from Q to Q. So let's keep our focus on the Y/Y numbers and you will discover they do paint a very pretty picture.

Overall, the Townships fared very well in Q4 and in 2018 as a whole. The more volatile markets in the GTA that receive credit for significant demand to the rural areas of our Region had a very tough year, yet the effects were largely avoided. The stability and economic diversity of our Townships grabbed the spotlight.

While interest in rural property typically slows in winter months, a healthy sales to new listing ratio and continued supply constraints should keep demand and subsequently prices high into Q1 2019.

Q4 | SALES TO

new listing ratio

A time of year typically short on inventory, this lead indicator rose back up again. Seller's were still in control.

0.79

34.6% ▲

▲16%

Y/Y increase in the North Dumfries median sale price. Added inventory didn't slow things down.

▲42%

Q/Q increase in Wellesley median list price. Through Q4 seller confidence continued to grow.

▲20%

Y/Y increase in the Puslinch median sale price. Huge upward growth despite a downturn in the GTA market.

▲47%

Q/Q increase in the Wilmot sales to new listing ratio. Inventory dropped and a return to scorching levels.

▼2%

Y/Y decrease in the Wilmot median sale price. Although slight, the only Township to witness decline.

▼3%

Q/Q decrease in the Centre Wellington median sale price. A torrid year tails off at the end.

▼39%

Y/Y decrease in the Guelph Eramosa sales to new listing ratio. Finally, a balanced market has arrived.

▼50%

Q/Q decrease in Woolwich new inventory. With half as many listings, prices continued to rise upwards.

* For a reference to calculations, visit <http://www.trilliumwest.com/knowledge/market-data/>

	Q4 2018	% Chg (Y)	Q4 2017	% Chg (Q)	Q3 2018
MEDIAN DET. SALE PRICE	\$590,000	73% ▲	\$550,000	3.3% ▼	\$610,000
NUMBER OF NEW SALES	262	5.7% ▼	278	29.5% ▼	372
MEDIAN DAYS ON MARKET	26	3 days ▲	23	6 days ▲	20
NEW INVENTORY	332	3.1% ▲	322	45.2% ▼	606

UP & DOWN quick review

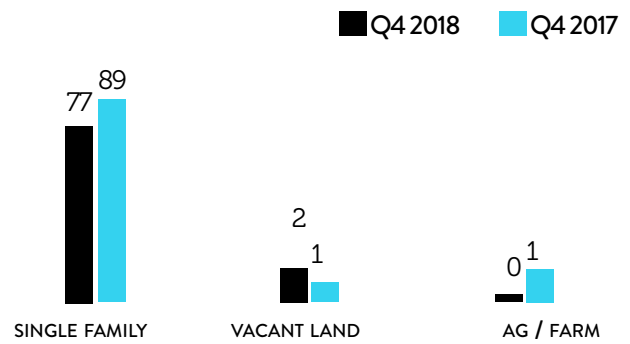
CENTRE WELLINGTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$525,000	79	93	0.85	\$493,000
Q4 2017 TOTAL	\$469,900	91	101	0.90	\$450,000
% CHANGE (+/-)	11.7% ▲	13.2% ▼	79% ▼	1% ▼	8.7% ▲
Q3 2018 TOTAL	\$549,900	120	172	0.70	\$510,000
% CHANGE (+/-)	4.5% ▼	34.2% ▼	45.9% ▼	30% ▲	3.3% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	85	97	▲
VACANT LAND	2	3	▼
AG / FARM	6	1	▲
TOTAL	93	101	▼
SALES TO NEW RATIO	0.85	0.90	▼

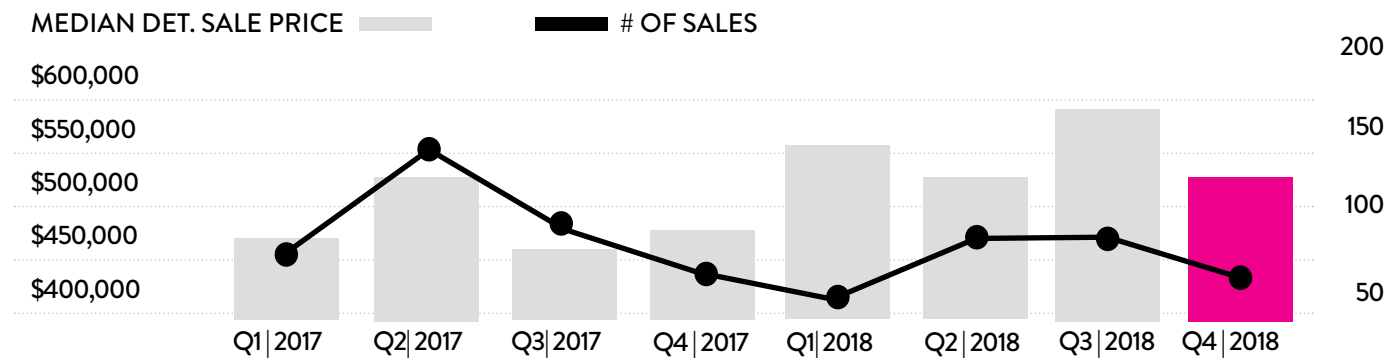
Q4 SALES BY INVENTORY TYPE



\$535,000
SINGLE FAMILY MEDIAN

\$218,500
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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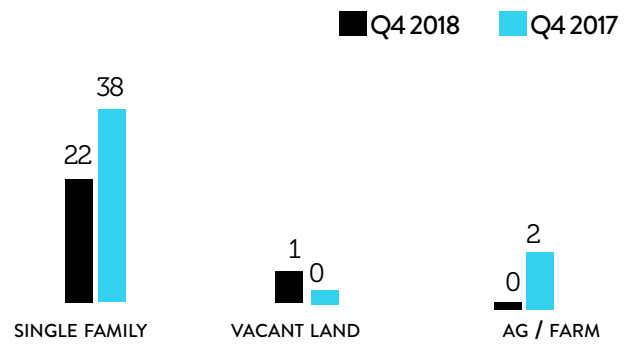
GUELPH ERAMOSA

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$750,000	23	45	0.51	\$680,000
Q4 2017 TOTAL	\$725,000	40	48	0.83	\$655,500
% CHANGE (+/-)	3.4% ▲	42.5% ▼	6.3% ▼	38.5% ▼	3.7% ▲
Q3 2018 TOTAL	\$779,000	39	67	0.58	\$668,000
% CHANGE (+/-)	3.7% ▼	41% ▼	32.8% ▼	12.1% ▼	1.8% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	34	45	▼
VACANT LAND	6	1	▼
AG / FARM	5	2	▲
TOTAL	45	48	▼
SALES TO NEW RATIO	0.51	0.83	▲

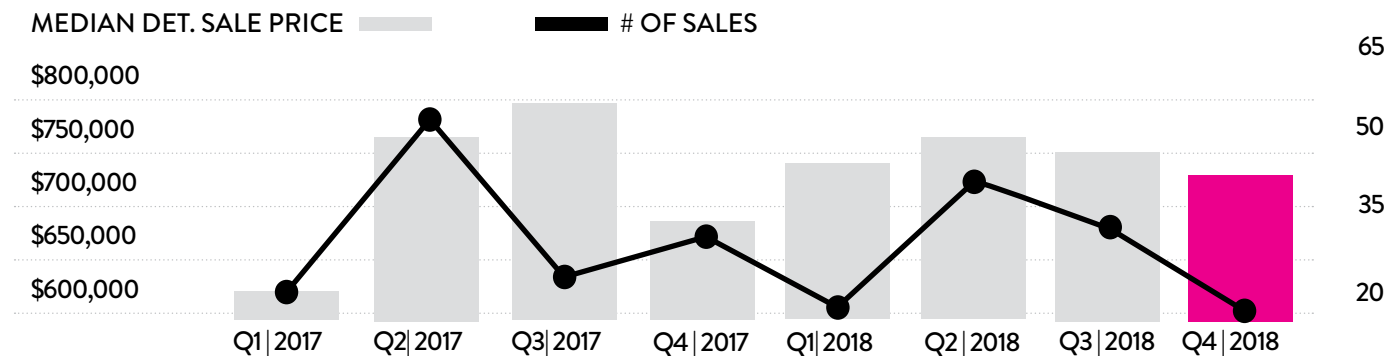
Q4 SALES BY INVENTORY TYPE



\$728,750
SINGLE FAMILY MEDIAN

\$600,000
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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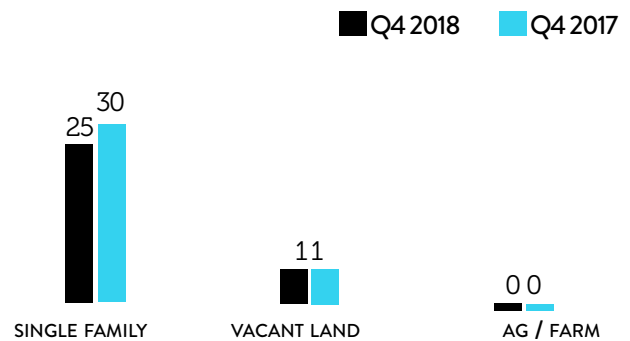
NORTH DUMFRIES

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$564,900	26	37	0.70	\$575,000
Q4 2017 TOTAL	\$539,800	31	35	0.89	\$495,000
% CHANGE (+/-)	4.6% ▲	16.6% ▼	5.7% ▲	26.8% ▼	16.2% ▲
Q3 2018 TOTAL	\$549,900	41	74	0.55	\$568,100
% CHANGE (+/-)	2.7% ▲	39% ▼	52.7% ▼	29% ▲	1.2% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	35	31	▲
VACANT LAND	2	1	▲
AG / FARM	0	3	▼
TOTAL	37	35	▲
SALES TO NEW RATIO	0.70	0.89	▼

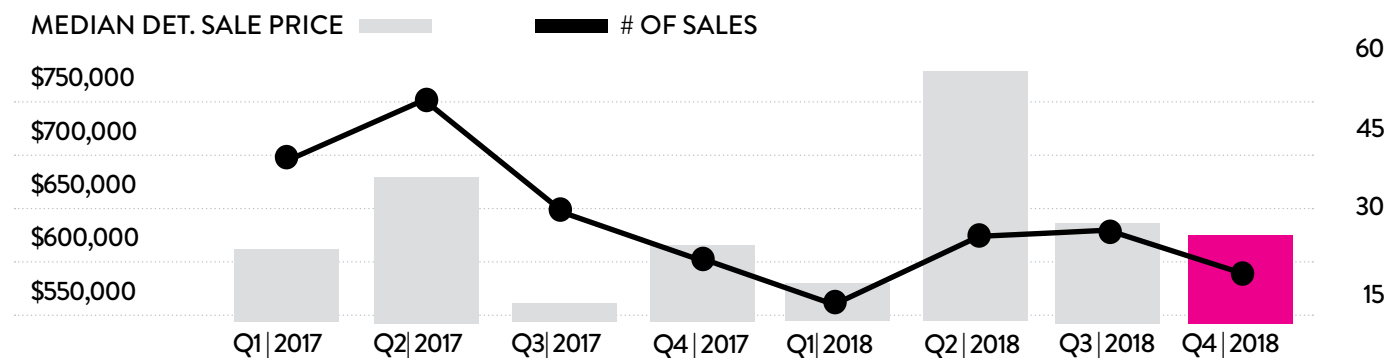
Q4 SALES BY INVENTORY TYPE



\$609,000
SINGLE FAMILY MEDIAN

\$450,000
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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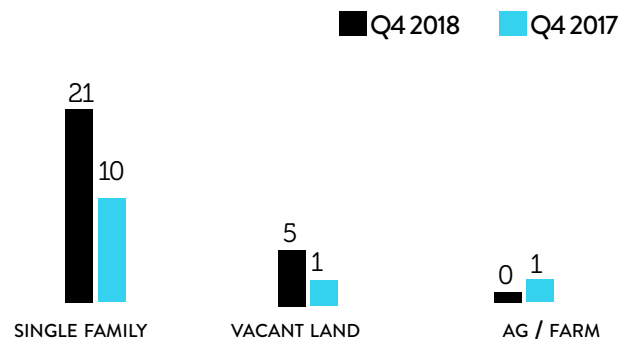
TOWNSHIP OF PUSLINCH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$1,149,900	26	42	0.62	\$905,000
Q4 2017 TOTAL	\$895,000	11	23	0.48	\$756,500
% CHANGE (+/-)	28.5% ▲	136% ▲	82.6% ▲	29.2% ▲	19.6% ▲
Q3 2018 TOTAL	\$1,385,000	31	66	0.47	\$790,000
% CHANGE (+/-)	17% ▼	19.2% ▼	36.4% ▼	31.9% ▲	14.5% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	30	20	▲
VACANT LAND	11	2	▼
AG / FARM	1	1	=
TOTAL	42	23	▲
SALES TO NEW RATIO	0.62	0.48	▲

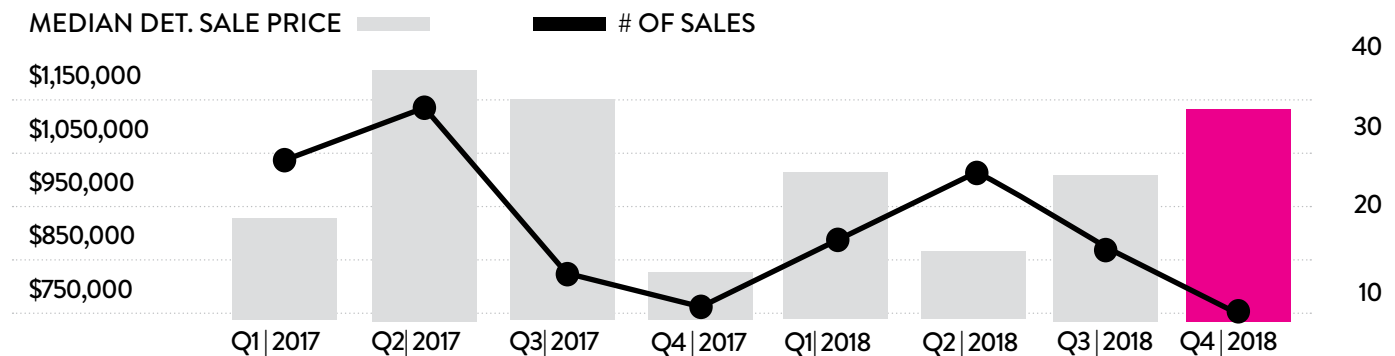
Q4 SALES BY INVENTORY TYPE



\$1,100,000
SINGLE FAMILY MEDIAN

\$450,000
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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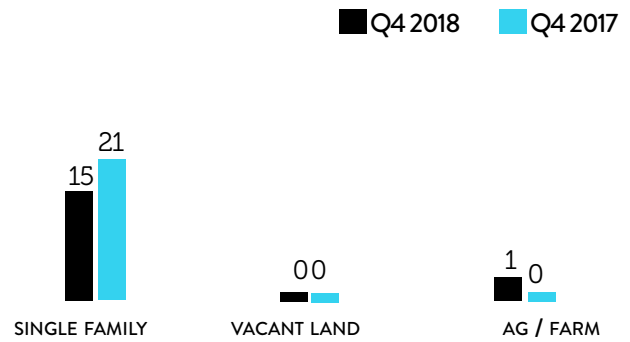
TOWNSHIP OF WELLESLEY

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$725,000	16	25	0.64	\$600,000
Q4 2017 TOTAL	\$578,750	21	20	1.05	\$566,000
% CHANGE (+/-)	42.2% ▲	23.8% ▼	25% ▲	39% ▼	6% ▲
Q3 2018 TOTAL	\$679,900	14	41	0.34	\$610,000
% CHANGE (+/-)	6.6% ▲	14.3% ▲	39% ▼	88.2% ▲	16% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	22	19	▲
VACANT LAND	2	1	▲
AG / FARM	1	0	▲
TOTAL	25	20	▲
SALES TO NEW RATIO	0.64	1.05	▼

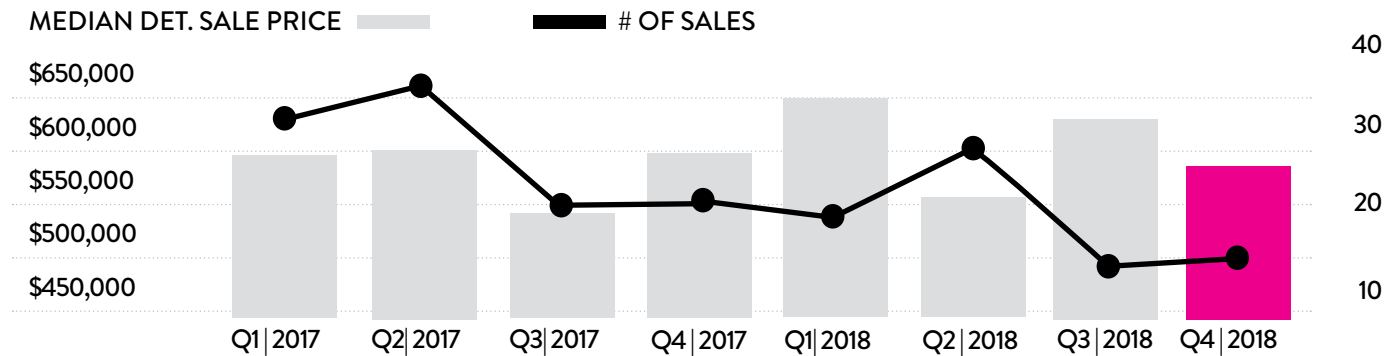
Q4 SALES BY INVENTORY TYPE



\$560,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

1,600,000
AG / FARM MEDIAN



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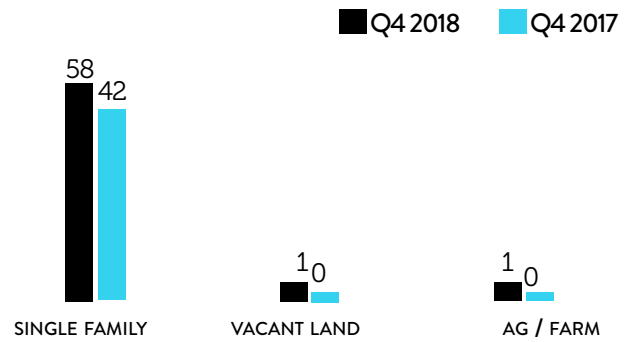
TOWNSHIP OF WILMOT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$548,750	60	74	0.81	\$455,200
Q4 2017 TOTAL	\$539,900	42	59	0.71	\$464,250
% CHANGE (+/-)	6.7% ▲	42.9% ▲	25.4% ▲	14% ▲	2% ▼
Q3 2018 TOTAL	\$629,900	71	128	0.55	\$540,000
% CHANGE (+/-)	7.2% ▼	15.5% ▼	42.2% ▼	47.3% ▲	15.7% ▼

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	72	53	▲
VACANT LAND	1	3	▼
AG / FARM	1	3	▼
TOTAL	74	59	▲
SALES TO NEW RATIO	0.81	0.71	▲

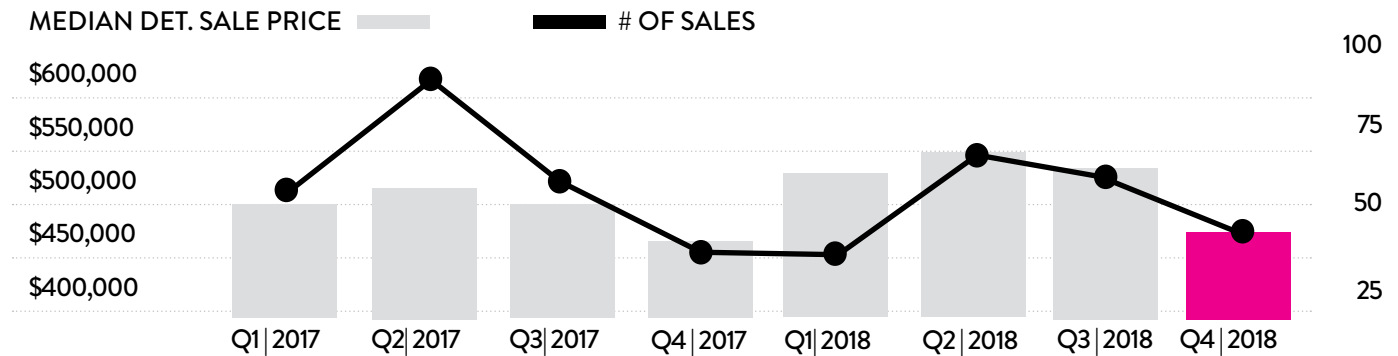
Q4 SALES BY INVENTORY TYPE



\$452,750
SINGLE FAMILY MEDIAN

\$1,400,000
VACANT LAND MEDIAN

2,170,000
AG / FARM MEDIAN



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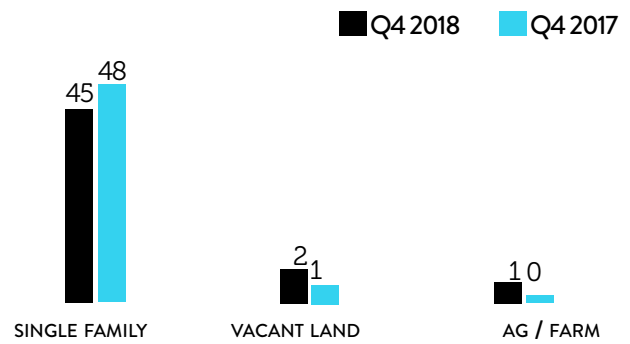
TOWNSHIP OF WOOLWICH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2018 TOTAL	\$570,000	48	55	0.87	\$510,000
Q4 2017 TOTAL	\$499,700	49	58	0.84	\$462,000
% CHANGE (+/-)	14.1% ▲	2% ▼	5.2% ▼	3.6% ▲	10.4% ▲
Q3 2018 TOTAL	\$554,900	80	109	0.73	\$505,000
% CHANGE (+/-)	2.7% ▲	40% ▼	49.5% ▼	16.1% ▲	1% ▲

Q4 NEW INVENTORY

	Q4 2018	Q4 2017	TREND
SINGLE FAMILY	54	57	▼
VACANT LAND	1	1	=
AG / FARM	0	0	=
TOTAL	55	58	▼
SALES TO NEW RATIO	0.87	0.84	▲

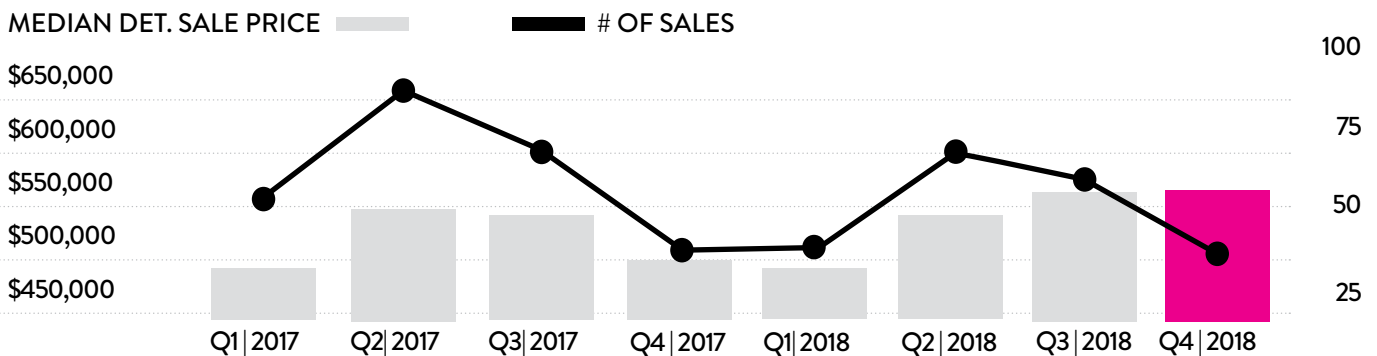
Q4 SALES BY INVENTORY TYPE



\$505,000
SINGLE FAMILY MEDIAN

\$499,900
VACANT LAND MEDIAN

\$1,600,000
AG / FARM MEDIAN



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A LITTLE ABOUT

TRILLIUMWEST

At TrilliumWest, we believe you should always eat, drink, shop and real estate local. Nobody knows the word on the street more than the locals and TW was born and bred right here in the Region. Un-franchise your real estate and live like a local.

We are a hard-working group of local marketing, investment, and sales professionals who love to look deeper into the data. We take pride in studying and truly understanding the numbers in the Regional real estate market so that we can appropriately advise, educate, and assist our clients in achieving their real estate goals.



Need even more detail in your data?

Visit trilliumwest.com/neighbourhoods for a micro view on individual neighbourhoods.

Any specific data requests can be sent to data@trilliumwest.com and we would be happy to help. Hit us up.

The Data Team at TW

