

TW 2019

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TRILLIUMWEST

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TRILLIUMWEST
QUARTERLY DATA REPORT

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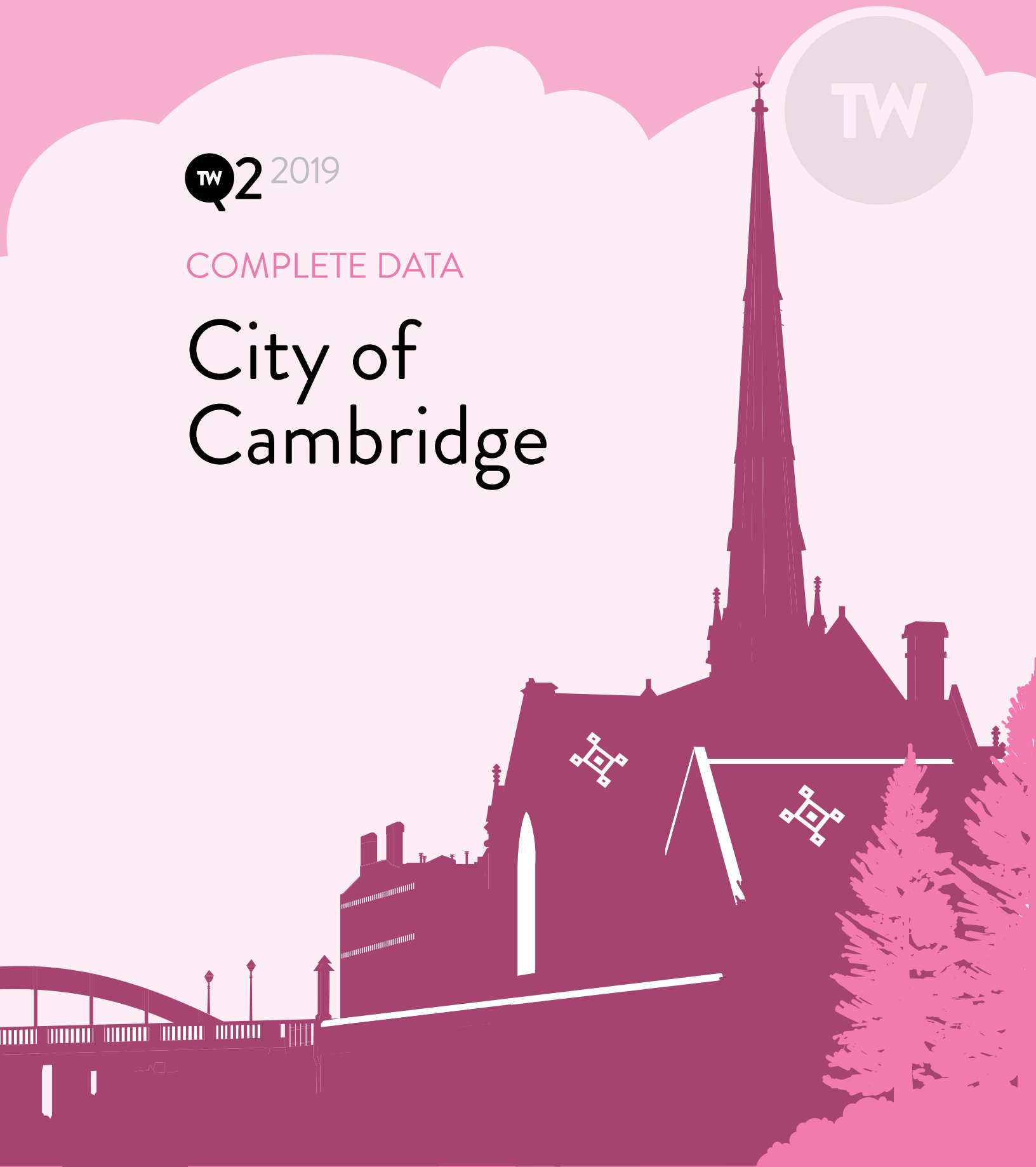


TW

TW Q2 2019

COMPLETE DATA

City of Cambridge



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

City of Cambridge

Q2 | 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.

0.68

INSIDE THE NUMBERS

The half million dollar club has a spiffy new member.

We have been talking about it for a few Q's now, and here we are. For the first time in Regional real estate history, Cambridge has joined the half million dollar club. The median detached sale price in the city didn't just surpass the landmark 500k mark in Q2, it smashed it. A 6.1% Q/Q and Y/Y increase simply can not be ignored.

With the other cities in the Region also having banner Q2's, remarkably there is still value to be found in Cambridge. The sub-regions of Preston and East Galt are still seeing detached home values of 20% or more when compared with surrounding neighbourhoods.

Trust your Realtor®, create a real strategy, search outside-the-box and find your hidden gem in Q3 - yes, they are still out there.

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

	Q2 2019	% Chg (Y)	Q2 2018	% Chg (Q)	Q1 2019
MEDIAN DET. SALE PRICE	\$520,000	6.1% ▲	\$490,000	6.1% ▲	\$490,000
NUMBER OF NEW SALES	665	11.8% ▲	595	76.4% ▲	377
MEDIAN DAYS ON MARKET	13	7 days ▼	20	1 days ▲	14
NEW INVENTORY	972	8.2% ▲	898	68.4% ▲	577

UP & DOWN quick review

▲95%

Q/Q increase in the number of sales in North Galt. A large leap forward in just one Q, but sustainable?

▼14%

Y/Y decrease in the North Galt median list price. Sellers made the right moves to get the right price.

▲12%

Y/Y increase in the Preston median list price. No slowing down for the biggest growth in town.

▼16%

Y/Y decrease in the Hespeler sales to new listing ratio. Dialing down the piquant sauce just a touch.

▲86%

Q/Q increase in the number of Hespeler new listings. A banner Q2 as sales also saw a big spike upwards.

▼2%

Q/Q decrease in the North Galt median sale price. A small drop, but the only Q/Q reduction in the city.

▲10%

Y/Y increase in the East Galt median sale price. That value secret definitely got out there.

▼4%

Y/Y decrease in the Preston sales to new listing ratio. At 0.7, this remains firmly a Seller's market

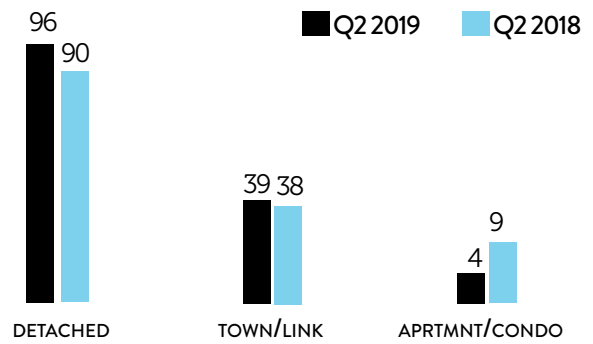
HESPELER CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$529,900	139	231	0.60	\$519,900
Q2 2018 TOTAL	\$514,000	137	194	0.71	\$489,900
% CHANGE (+/-)	3.1% ▲	14% ▲	19.1% ▲	15.5% ▼	6.1% ▲
Q1 2019 TOTAL	\$529,950	79	124	0.64	\$470,456
% CHANGE (+/-)	0.01% ▼	76% ▲	86.3% ▲	6.2% ▼	10.5% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	168	137	▲
TOWN/LINK HOMES	57	48	▲
APARTMENT/CONDO	6	9	▼
TOTAL	231	194	▲
SALES TO NEW RATIO	0.60	0.71	▼

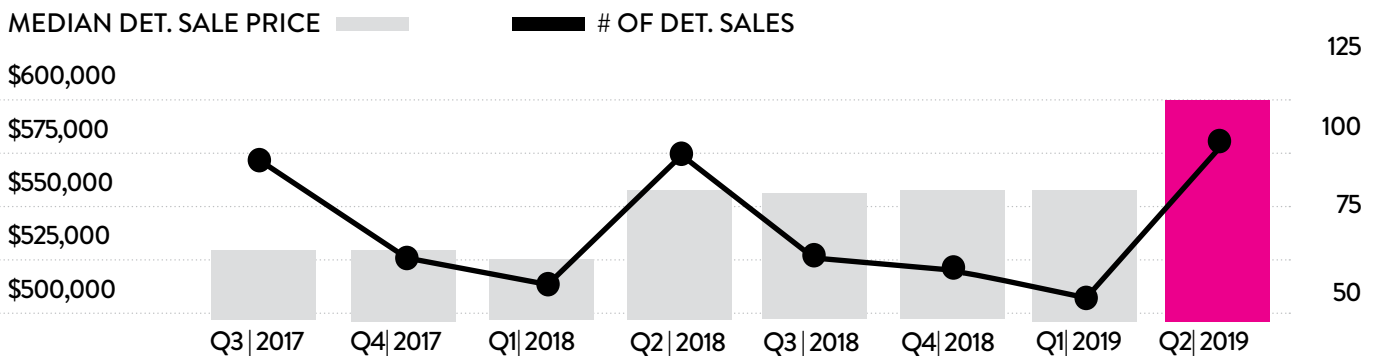
Q2 SALES BY INVENTORY TYPE



\$584,250
DETACHED MEDIAN SALE

\$410,000
TOWN/LINK MEDIAN SALE

\$309,750
APMNT/CONDO MEDIAN SALE



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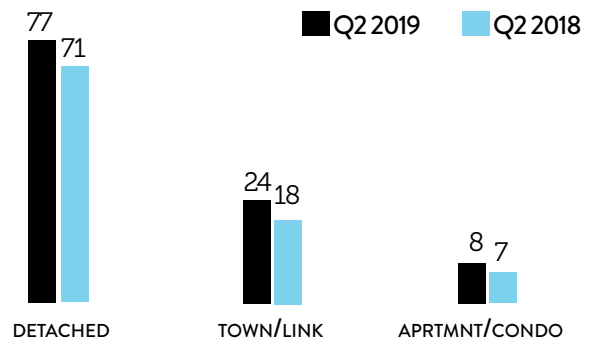
PRESTON CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$477,500	109	156	0.70	\$445,000
Q2 2018 TOTAL	\$424,950	96	132	0.73	\$415,000
% CHANGE (+/-)	12.4% ▲	13.5% ▲	18.2% ▲	4.1% ▼	7.2% ▲
Q1 2019 TOTAL	\$449,900	57	97	0.59	\$423,000
% CHANGE (+/-)	6.1% ▲	91.2% ▲	60.8% ▲	18.6% ▲	5.2% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	115	97	▲
TOWN/LINK HOMES	34	29	▲
APARTMENT/CONDO	7	6	▲
TOTAL	156	132	▲
SALES TO NEW RATIO	0.70	0.73	▼

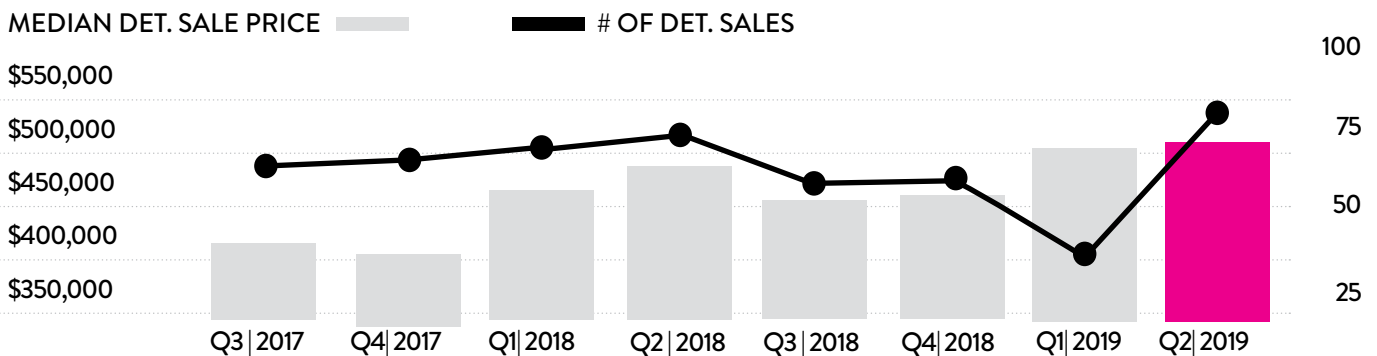
Q2 SALES BY INVENTORY TYPE



\$488,000
DETACHED MEDIAN SALE

\$375,000
TOWN/LINK MEDIAN SALE

\$304,750
APMNT/CONDO MEDIAN SALE



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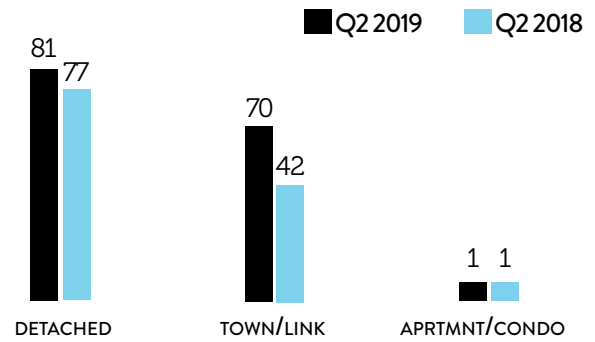
NORTH GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$479,900	152	197	0.77	\$465,500
Q2 2018 TOTAL	\$559,900	120	206	0.58	\$450,000
% CHANGE (+/-)	14.3% ▼	26.7% ▲	4.4% ▼	32.7% ▲	3.3% ▲
Q1 2019 TOTAL	\$489,900	78	106	0.73	\$475,000
% CHANGE (+/-)	2% ▼	94.9% ▲	85.8% ▲	5.5% ▲	2% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	125	153	▼
TOWN/LINK HOMES	71	52	▲
APARTMENT/CONDO	1	1	=
TOTAL	197	206	▼
SALES TO NEW RATIO	0.77	0.58	▲

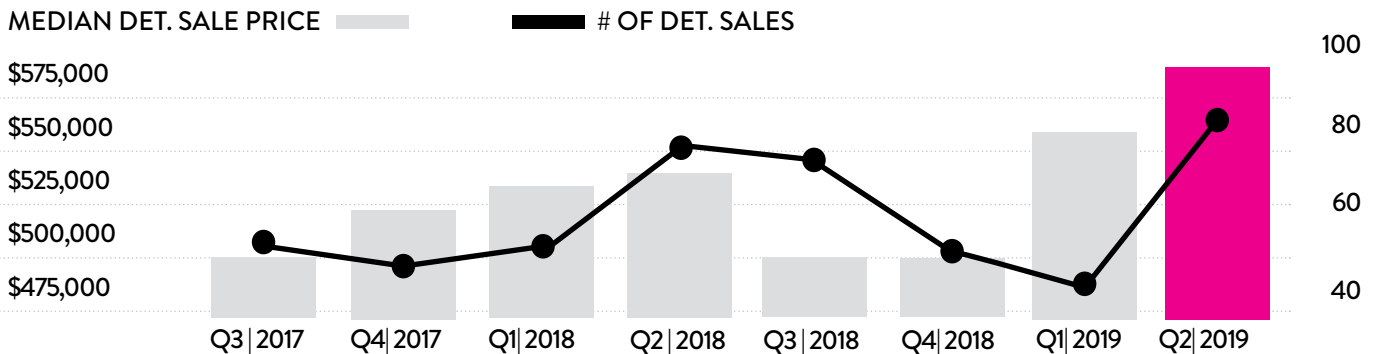
Q2 SALES BY INVENTORY TYPE



\$575,500
DETACHED MEDIAN SALE

\$390,000
TOWN/LINK MEDIAN SALE

\$269,900
APMNT/CONDO MEDIAN SALE



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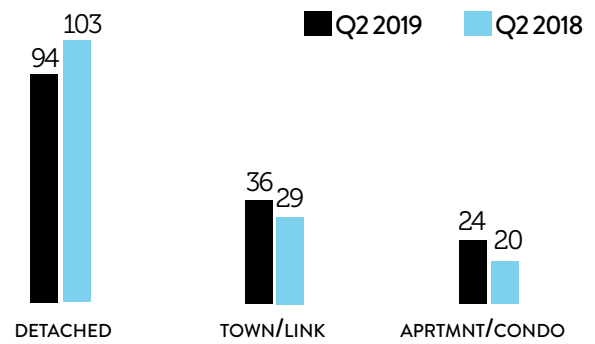
EAST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$449,900	154	233	0.66	\$432,500
Q2 2018 TOTAL	\$409,900	152	226	0.67	\$392,000
% CHANGE (+/-)	9.7% ▲	1.3% ▲	3.1% ▲	1.5% ▼	10.3% ▲
Q1 2019 TOTAL	\$439,800	88	139	0.63	\$422,500
% CHANGE (+/-)	2.3% ▲	75% ▲	3.1% ▲	4.8% ▲	2.4% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	166	171	▼
TOWN/LINK HOMES	44	27	▲
APARTMENT/CONDO	23	28	▼
TOTAL	233	226	▲
SALES TO NEW RATIO	0.66	0.67	▼

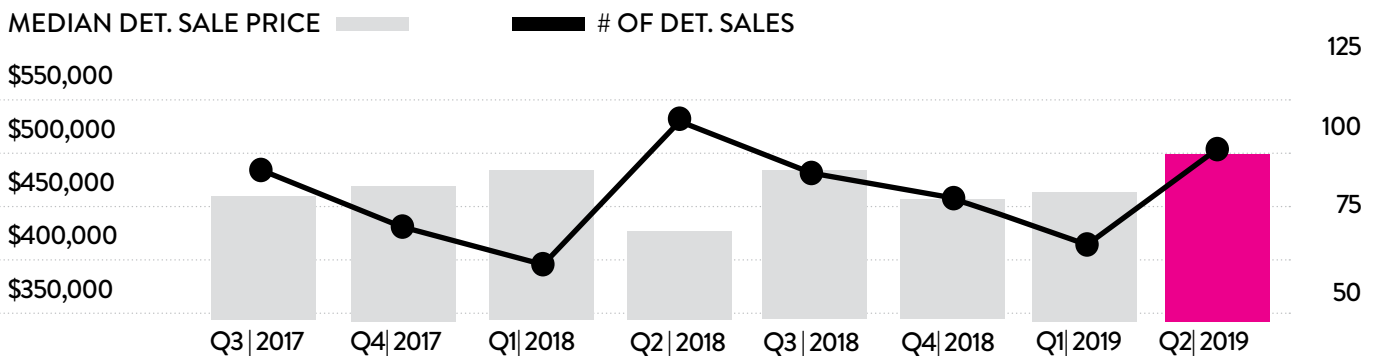
Q2 SALES BY INVENTORY TYPE



\$475,000
DETACHED MEDIAN SALE

\$388,750
TOWN/LINK MEDIAN SALE

\$296,000
APMNT/CONDO MEDIAN SALE



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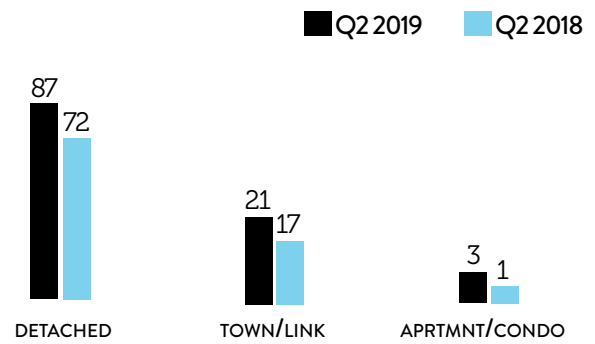
WEST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$524,900	111	155	0.72	\$480,000
Q2 2018 TOTAL	\$499,900	90	140	0.64	\$465,000
% CHANGE (+/-)	5% ▲	23.3% ▲	10.7% ▲	12.5% ▲	3.2% ▲
Q1 2019 TOTAL	\$499,900	75	111	0.68	\$490,020
% CHANGE (+/-)	5% ▲	48% ▲	39.6% ▲	5.9% ▲	2% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	128	117	▲
TOWN/LINK HOMES	23	18	▲
APARTMENT/CONDO	4	5	▼
TOTAL	155	140	▲
SALES TO NEW RATIO	0.72	0.64	▲

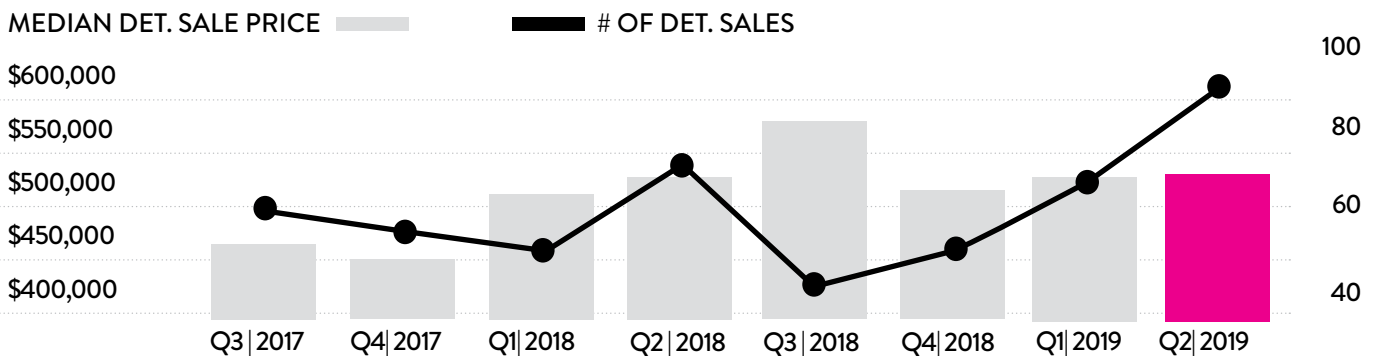
Q2 SALES BY INVENTORY TYPE



\$500,000
DETACHED MEDIAN SALE

\$377,400
TOWN/LINK MEDIAN SALE

\$410,000
APMNT/CONDO MEDIAN SALE



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2019

COMPLETE DATA

City of Guelph



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INSIDE THE NUMBERS

Sustainable in every way. It's a Guelph market kinda thing.

Back to familiar territory in every area of town, that's where we are. Despite some of the variations amongst different price points, the Guelph market can be summed up in one blanket statement - price it right and Seller's will find success. Miss your mark and the market simply will not respond.

While this may seem like an overtly simple statement, this hasn't necessarily been the case in the past few years. Pricing errors were previously more easily absorbed the past few years. We simply are not there anymore.

This is a return to a more familiar time for Guelph, where for 20+ years we saw a more proactive approach for both Buyers and Sellers prove to be the winning formula.

Q2 | 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.

0.67

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

	Q2 2019	% Chg (Y)	Q2 2018	% Chg (Q)	Q1 2019
MEDIAN DET. SALE PRICE	\$595,000	6.8% ▲	\$557,000	2.1% ▲	\$582,500
NUMBER OF NEW SALES	712	9.9% ▲	648	57.2% ▲	453
MEDIAN DAYS ON MARKET	15	=	15	=	15
NEW INVENTORY	1060	6.6% ▲	994	45.6% ▲	728

UP & DOWN quick review

▲80%

Q/Q increase in East Guelph sales volume. All green arrows in the East, but this one is the star.

▼10%

Y/Y reduction in South Guelph new inventory. Add in adjusted list prices and sale prices went up.

▲40%

Q/Q increase in the North Guelph sales to new listing ratio. A large leap back into scorching territory.

▼4%

Q/Q reduction in West Guelph median list price. Sellers made the adjustments and sales increased.

▲13%

Y/Y increase in Downtown median sale price. The game remains the same in the city centre.

▼6%

Y/Y drop in number of Downtown sales. No real cause for concern as the ratio remains hot, hot, hot.

▲8%

Y/Y increase in the West Guelph median list price. Significant as it now matches that of East Guelph.

▼12%

Y/Y drop in the Midtown sales to new listing ratio. Sellers are still winning heading out of a busy Q2.

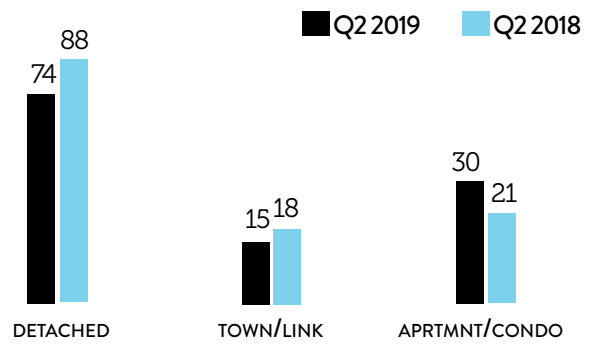
DOWNTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$549,900	119	185	0.64	\$520,000
Q2 2018 TOTAL	\$489,900	127	174	0.73	\$460,000
% CHANGE (+/-)	12.2% ▲	6.3% ▼	6.3 ▲	12.3% ▼	13% ▲
Q1 2019 TOTAL	\$539,000	76	109	0.70	\$513,500
% CHANGE (+/-)	2% ▲	56.6% ▲	69.7% ▲	8.6% ▼	1.3% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	127	127	=
TOWN/LINK HOMES	19	19	=
APARTMENT/CONDO	39	28	▲
TOTAL	185	174	▲
SALES TO NEW RATIO	0.64	0.73	▼

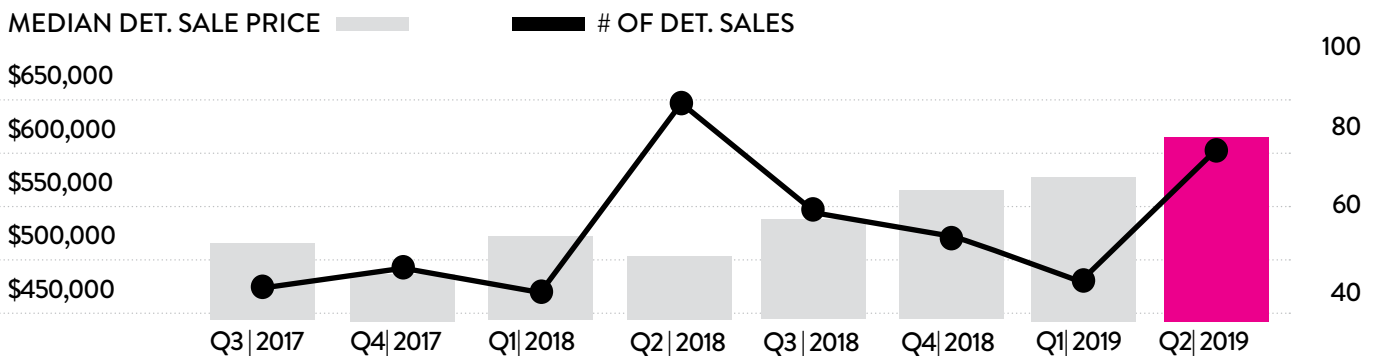
Q2 SALES BY INVENTORY TYPE



\$580,000
DETACHED MEDIAN SALE

\$475,000
TOWN/LINK MEDIAN SALE

\$395,500
APMNT/CONDO MEDIAN SALE



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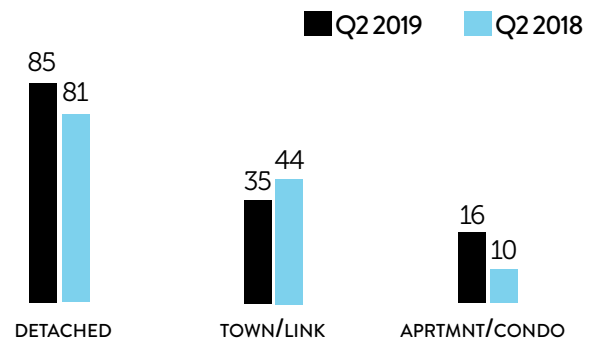
MIDTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$619,900	136	228	0.60	\$577,000
Q2 2018 TOTAL	\$589,900	135	199	0.68	\$540,000
% CHANGE (+/-)	5.1% ▲	0.7% ▲	14.6% ▲	11.8% ▼	6.8% ▲
Q1 2019 TOTAL	\$552,000	101	177	0.57	\$495,999
% CHANGE (+/-)	5.1% ▲	34.6% ▲	28.8% ▲	5.3% ▲	16.3% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	147	122	▲
TOWN/LINK HOMES	64	63	▲
APARTMENT/CONDO	17	14	▲
TOTAL	228	199	▲
SALES TO NEW RATIO	0.60	0.68	▼

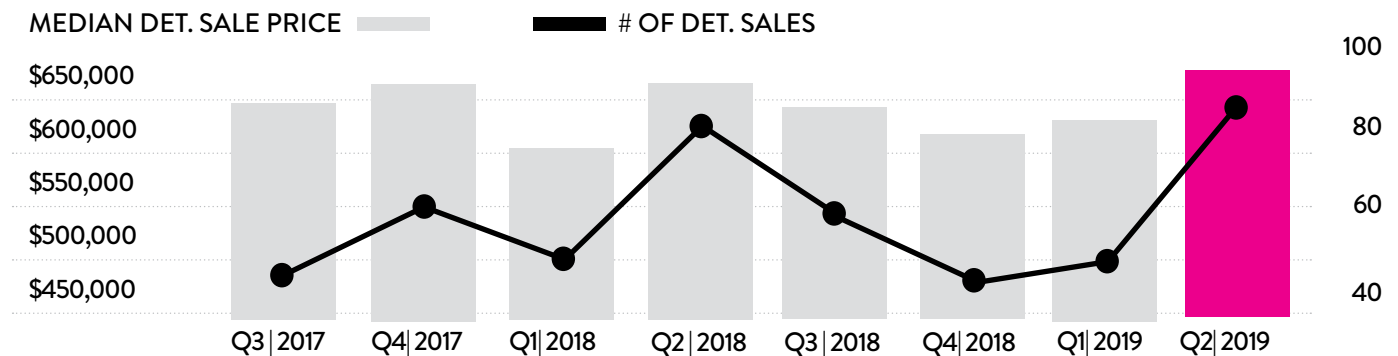
Q2 SALES BY INVENTORY TYPE



\$650,111
DETACHED MEDIAN SALE

\$478,000
TOWN/LINK MEDIAN SALE

\$294,350
APMNT/CONDO MEDIAN SALE



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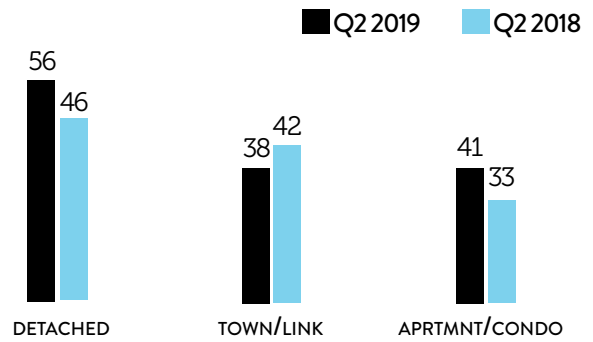
SOUTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$550,000	135	212	0.64	\$535,000
Q2 2018 TOTAL	\$599,900	121	236	0.51	\$495,000
% CHANGE (+/-)	8.3% ▼	11.6% ▲	10.2% ▼	25.5% ▲	8.8% ▲
Q1 2019 TOTAL	\$489,900	109	185	0.59	\$459,900
% CHANGE (+/-)	12.3% ▲	23.8% ▲	14.6% ▲	8.5% ▲	16.3% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	88	133	▼
TOWN/LINK HOMES	54	53	▲
APARTMENT/CONDO	70	50	▲
TOTAL	212	236	▼
SALES TO NEW RATIO	0.64	0.51	▲

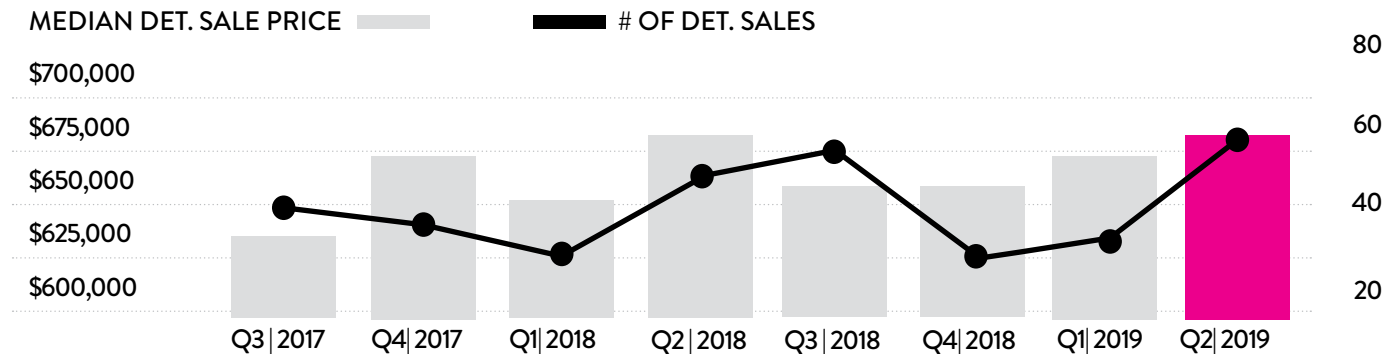
Q2 SALES BY INVENTORY TYPE



\$670,000
DETACHED MEDIAN SALE

475,4500
TOWN/LINK MEDIAN SALE

\$349,900
APMNT/CONDO MEDIAN SALE



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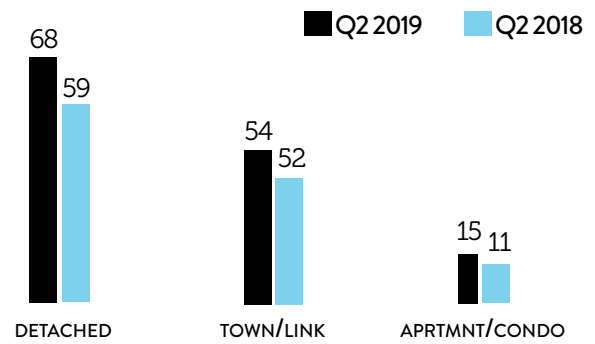
EAST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$525,000	137	189	0.72	\$500,00
Q2 2018 TOTAL	\$499,900	122	183	0.67	\$474,250
% CHANGE (+/-)	5% ▲	12.3% ▲	3.3% ▲	7.5% ▲	5.4% ▲
Q1 2019 TOTAL	\$519,900	76	107	0.71	\$487,500
% CHANGE (+/-)	1% ▲	80.2% ▲	76.6% ▲	1.4% ▲	2.6% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	117	99	▲
TOWN/LINK HOMES	56	63	▼
APARTMENT/CONDO	16	21	▼
TOTAL	189	183	▲
SALES TO NEW RATIO	0.72	0.67	▲

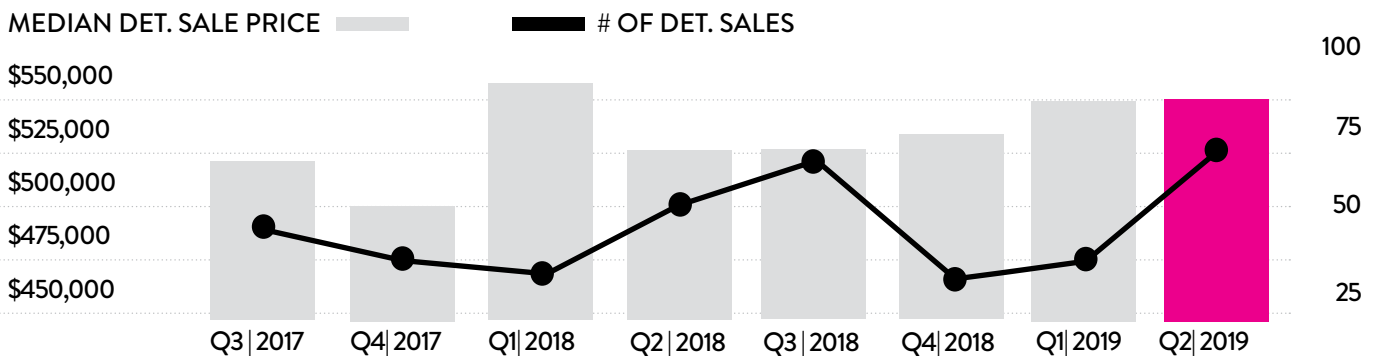
Q2 SALES BY INVENTORY TYPE



\$537,500
DETACHED MEDIAN SALE

\$489,250
TOWN/LINK MEDIAN SALE

\$292,200
APMNT/CONDO MEDIAN SALE



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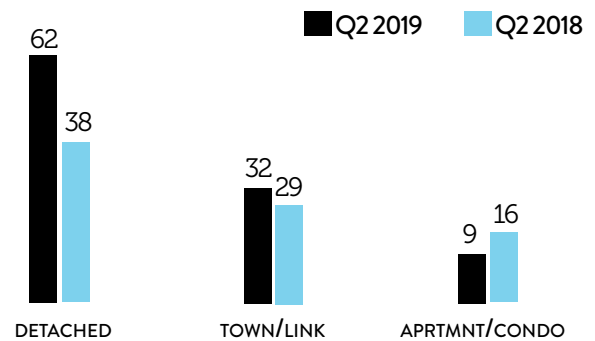
WEST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$525,000	103	145	0.71	\$510,000
Q2 2018 TOTAL	\$484,700	83	124	0.67	\$439,000
% CHANGE (+/-)	8.3% ▲	24.1% ▲	16.9% ▲	6% ▲	16.2% ▲
Q1 2019 TOTAL	\$544,500	62	95	0.65	\$495,750
% CHANGE (+/-)	3.6% ▼	66.1% ▲	52.6% ▲	9.2% ▲	2.9% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	87	69	▲
TOWN/LINK HOMES	52	41	▲
APARTMENT/CONDO	6	14	▼
TOTAL	145	124	▲
SALES TO NEW RATIO	0.71	0.67	▲

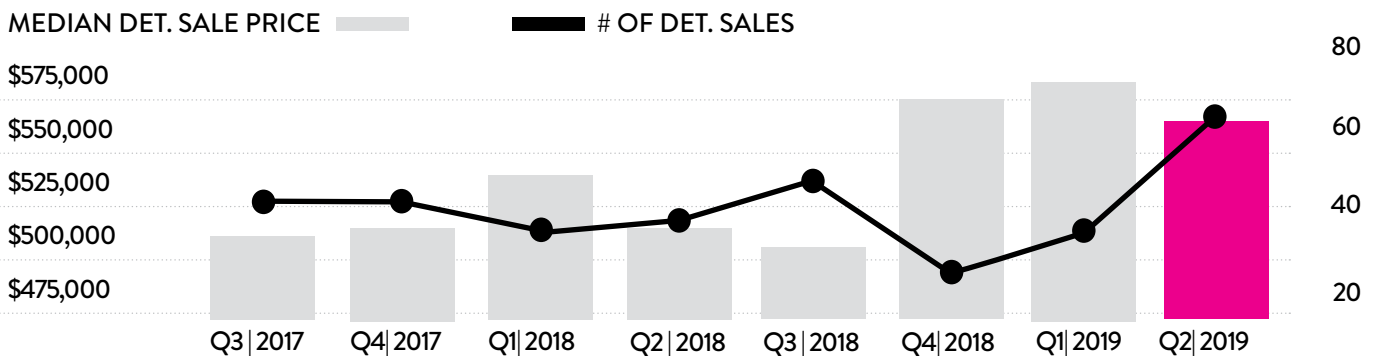
Q2 SALES BY INVENTORY TYPE



\$558,000
DETACHED MEDIAN SALE

\$382,450
TOWN/LINK MEDIAN SALE

\$235,000
APMNT/CONDO MEDIAN SALE



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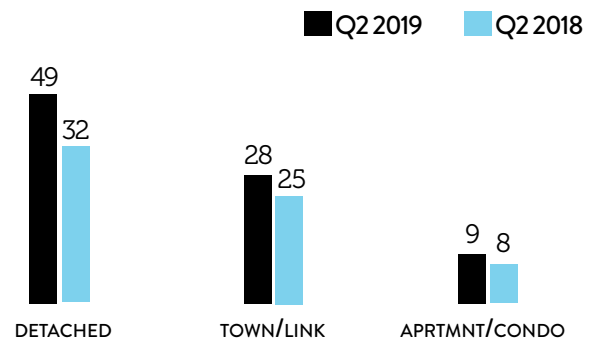
NORTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$532,450	86	106	0.81	\$514,450
Q2 2018 TOTAL	\$489,900	65	87	0.75	\$464,000
% CHANGE (+/-)	8.7% ▲	32.3% ▲	21.8% ▲	8% ▲	10.9% ▲
Q1 2019 TOTAL	\$492,000	35	60	0.58	\$490,000
% CHANGE (+/-)	8.2% ▲	145% ▲	76.7% ▲	39.6% ▲	5% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	64	51	▲
TOWN/LINK HOMES	33	25	▲
APARTMENT/CONDO	9	11	▼
TOTAL	106	87	▲
SALES TO NEW RATIO	0.81	0.75	▲

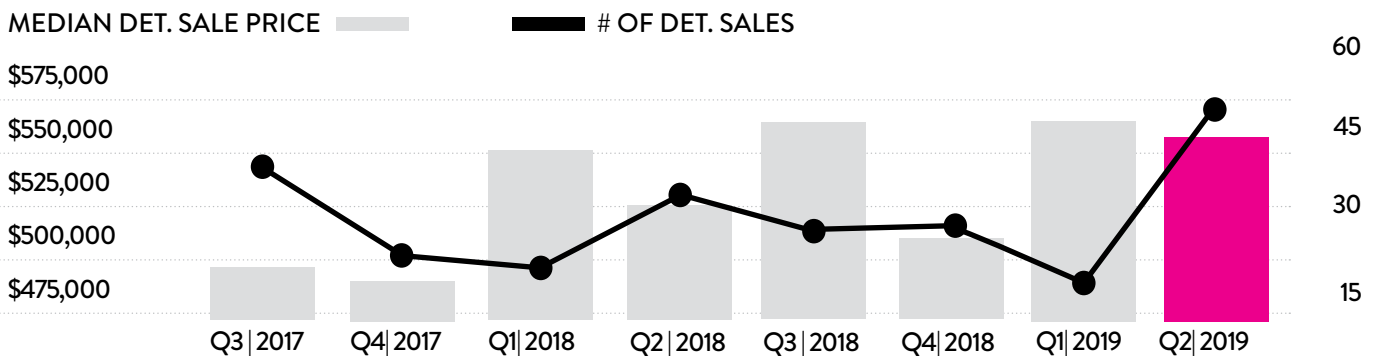
Q2 SALES BY INVENTORY TYPE



\$549,900
DETACHED MEDIAN SALE

\$467,500
TOWN/LINK MEDIAN SALE

\$360,000
APMNT/CONDO MEDIAN SALE



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COMPLETE DATA

Cities of Kitchener + Waterloo



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

Cities of Kitchener + Waterloo

Q2 | 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.

0.68

INSIDE THE NUMBERS

Yes, this feels a little more comfortable.

Q2 was to be a telling time for the Kitchener/Waterloo market, and what a story it did tell. After the hectic ride of 2018 was over, the market almost didn't know what to do to start the year. Would things tail off, or could a happy place in this new reality be found? Q2 went with happy place.

In this new reality, Seller's still have control, but there is a definite tipping point. Aggressive asking prices are simply not rewarded. This seems to hold especially true in the new home market, where purchasers are still willing to line-up overnight for the right product at the right price. But, it's 100% gotta be the right price.

The speed should slow slightly this summer, but Buyer interest doesn't appear to be on the decline headed into Q3.

You do you KW.

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

	Q2 2019	% Chg (Y)	Q2 2018	% Chg (Q)	Q1 2019
MEDIAN DET. SALE PRICE	\$575,000	12.7% ▲	\$510,000	8.5% ▲	\$530,000
NUMBER OF NEW SALES	1769	3.2% ▲	1714	68.5% ▲	1050
MEDIAN DAYS ON MARKET	13	1 day ▼	14	=	13
NEW INVENTORY	2601	0.8% ▲	2581	48.9% ▲	1747

UP & DOWN quick review

- ▲84% Q/Q increase in East Kitchener volume of sales. The East was a spring market selling beast.
- ▼23% Y/Y reduction in the Downtown sales to new listing ratio. A little breathing room for Buyers in the core.
- ▲8% Y/Y increase in the number of West Kitchener new inventory. The busiest 'hood in the Region got busier.
- ▼3% Q/Q reduction in Uptown median sale price. Buyers again called the shots in condo-centric land.
- ▲17% Y/Y increase in East Waterloo median sale price. The biggest jump in KW and no signs of slowing down.
- ▼13% Y/Y reduction in East Waterloo median list price. Sellers adjusted to get the right results in Q2.
- ▲14% Q/Q increase in West Waterloo median sale price. A big jump to crown the new highest market in KW.
- ▼14% Y/Y reduction in the number of West Waterloo new listings. Yeah, prices spiked 13% during the same period.

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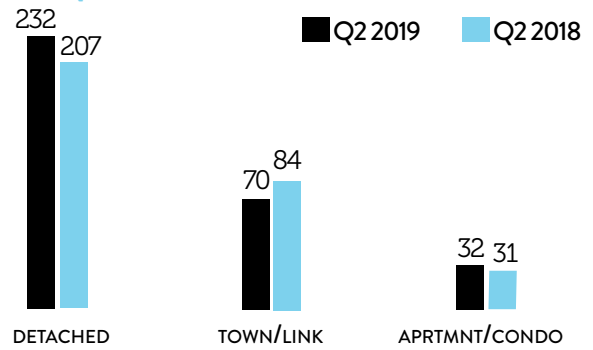
EAST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$499,450	334	470	0.71	\$477,722
Q2 2018 TOTAL	\$459,900	322	498	0.65	\$440,000
% CHANGE (+/-)	8.6% ▲	3.7% ▲	5.6% ▼	9.2% ▲	8.6% ▲
Q1 2019 TOTAL	\$482,450	182	274	0.66	\$455,300
% CHANGE (+/-)	3.5% ▲	83.5% ▲	71.5% ▲	76% ▲	4.9% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	328	354	▼
TOWN/LINK HOMES	102	95	▲
APARTMENT/CONDO	40	49	▼
TOTAL	470	498	▼
SALES TO NEW RATIO	0.71	0.65	▲

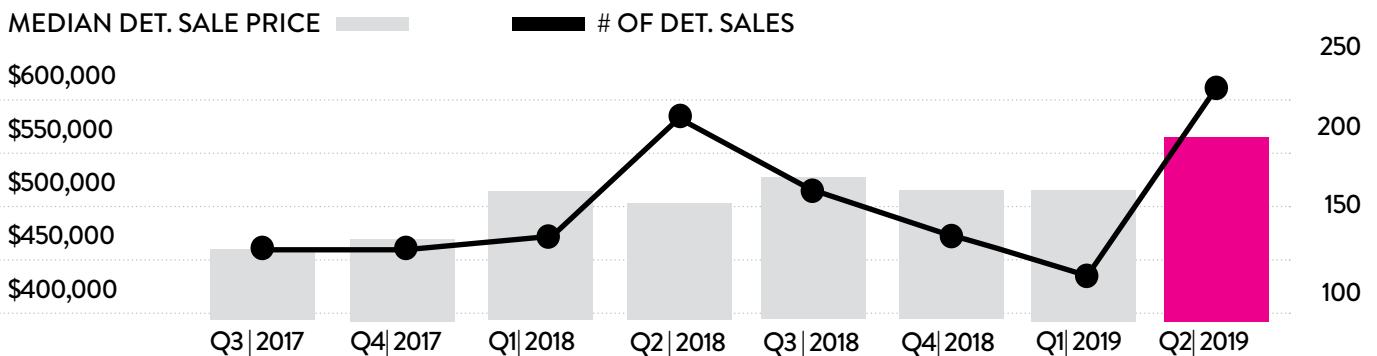
Q2 SALES BY INVENTORY TYPE



\$530,625
DETACHED MEDIAN SALE

\$414,900
TOWN/LINK MEDIAN SALE

\$277,050
APMNT/CONDO MEDIAN SALE



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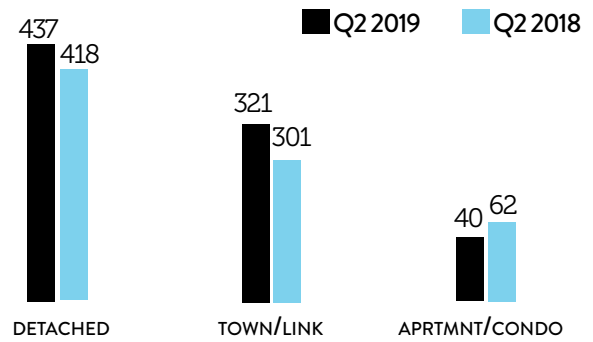
WEST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$499,900	798	1141	0.70	\$472,000
Q2 2018 TOTAL	\$450,000	781	1057	0.74	\$429,280
% CHANGE (+/-)	11.8% ▲	2.1% ▲	79% ▲	5.4% ▼	9.9% ▲
Q1 2019 TOTAL	\$489,900	512	794	0.64	\$454,000
% CHANGE (+/-)	2% ▲	55.8% ▲	43.7% ▲	9.4% ▲	4% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	692	653	▲
TOWN/LINK HOMES	399	333	▲
APARTMENT/CONDO	50	71	▼
TOTAL	1141	1057	▲
SALES TO NEW RATIO	0.70	0.74	▼

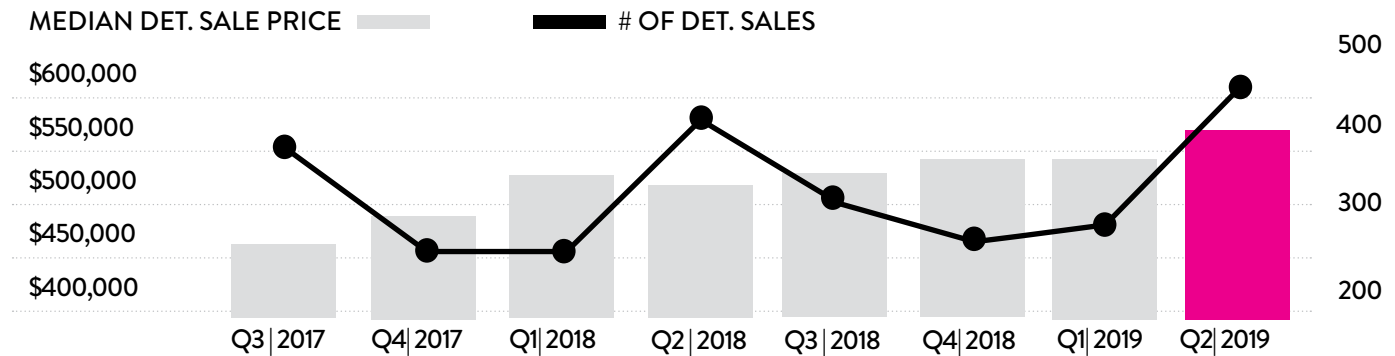
Q2 SALES BY INVENTORY TYPE



\$555,998
DETACHED MEDIAN SALE

\$405,000
TOWN/LINK MEDIAN SALE

\$275,450
APMNT/CONDO MEDIAN SALE



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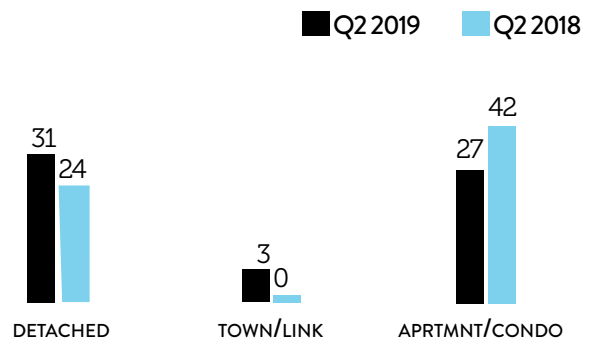
DOWNTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$399,900	61	111	0.55	\$408,000
Q2 2018 TOTAL	\$375,000	66	93	0.71	\$365,000
% CHANGE (+/-)	6.6% ▲	76% ▼	19.3% ▲	22.5% ▼	11.8% ▲
Q1 2019 TOTAL	\$399,900	38	84	0.45	\$380,000
% CHANGE (+/-)	=	60.5% ▲	32.1% ▲	22.2% ▲	74% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	44	31	▲
TOWN/LINK HOMES	8	2	▲
APARTMENT/CONDO	59	60	▼
TOTAL	111	93	▲
SALES TO NEW RATIO	0.55	0.71	▼

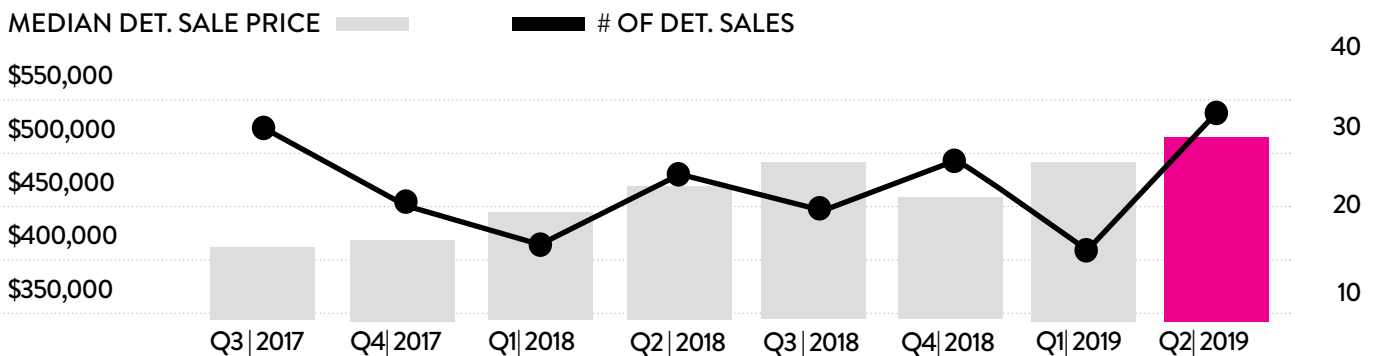
Q2 SALES BY INVENTORY TYPE



\$490,000
DETACHED MEDIAN SALE

\$399,990
TOWN/LINK MEDIAN SALE

\$369,900
APMNT/CONDO MEDIAN SALE



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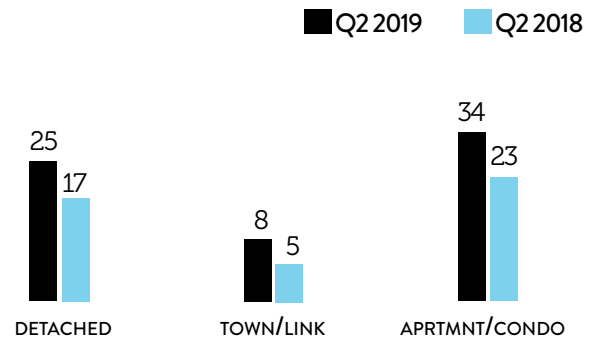
UPTOWN WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$480,000	67	107	0.63	\$470,000
Q2 2018 TOTAL	\$480,000	45	88	0.51	\$426,000
% CHANGE (+/-)	=	48.9% ▲	21.6% ▲	23.5% ▲	10.3% ▲
Q1 2019 TOTAL	\$495,000	32	69	0.46	\$486,450
% CHANGE (+/-)	3% ▼	109% ▲	55.1% ▲	36.9% ▲	3.4% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	34	31	▲
TOWN/LINK HOMES	19	8	▲
APARTMENT/CONDO	54	49	▲
TOTAL	107	88	▲
SALES TO NEW RATIO	0.63	0.51	▲

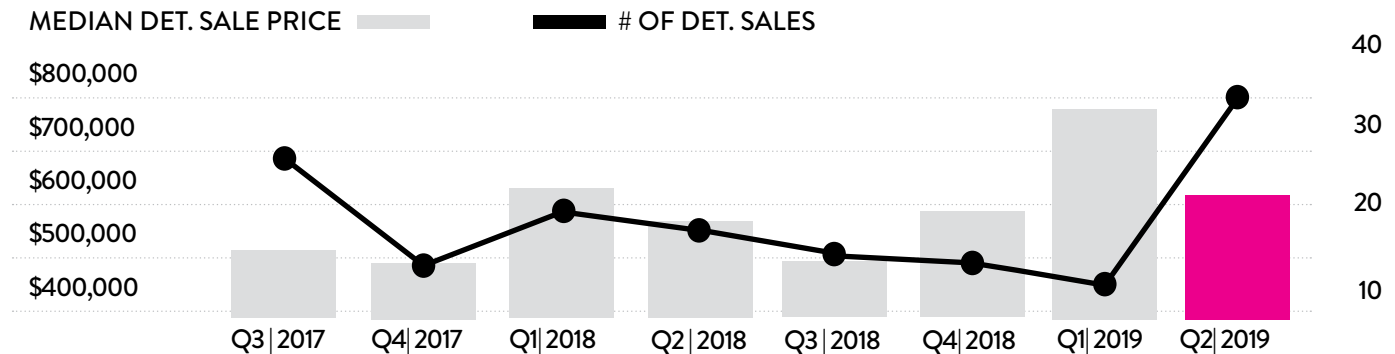
Q2 SALES BY INVENTORY TYPE



\$575,000
DETACHED MEDIAN SALE

\$424,450
TOWN/LINK MEDIAN SALE

\$420,000
APMNT/CONDO MEDIAN SALE



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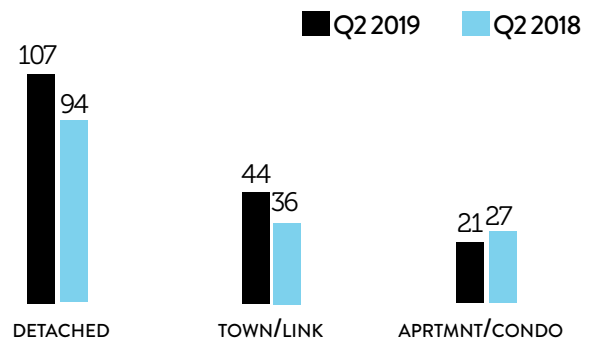
EAST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$524,888	172	239	0.72	\$550,150
Q2 2018 TOTAL	\$499,900	157	238	0.66	\$468,850
% CHANGE (+/-)	5% ▲	9.5% ▲	0.4% ▲	9.1% ▲	17.3% ▲
Q1 2019 TOTAL	\$600,000	83	153	0.54	\$520,000
% CHANGE (+/-)	12.5% ▼	107% ▲	56.2% ▲	33.3% ▲	5.8% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	152	147	▲
TOWN/LINK HOMES	55	56	▼
APARTMENT/CONDO	32	35	▼
TOTAL	239	238	▲
SALES TO NEW RATIO	0.72	0.66	▲

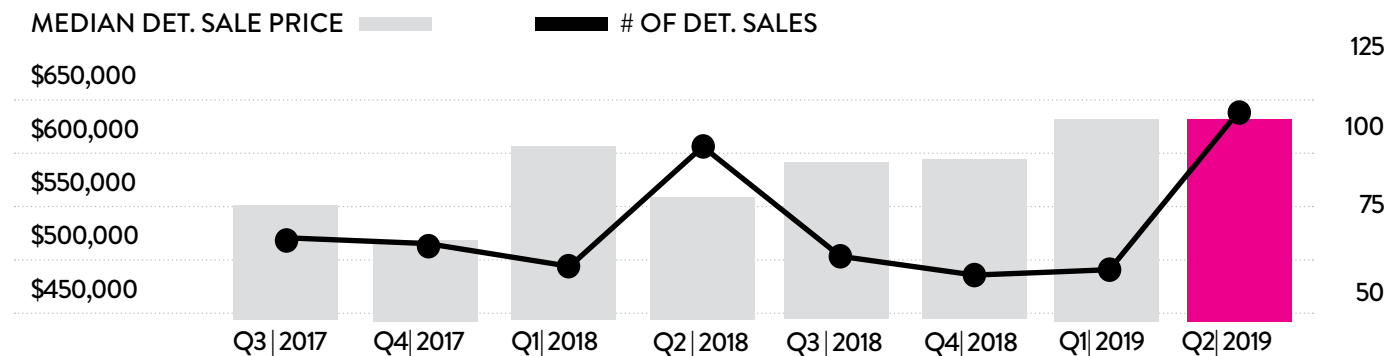
Q2 SALES BY INVENTORY TYPE



\$610,000
DETACHED MEDIAN SALE

\$450,500
TOWN/LINK MEDIAN SALE

\$338,000
APMNT/CONDO MEDIAN SALE



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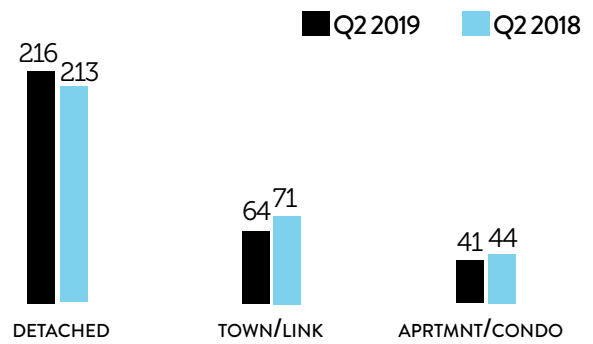
WEST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$575,000	321	510	0.63	\$568,000
Q2 2018 TOTAL	\$544,250	328	590	0.55	\$502,500
% CHANGE (+/-)	5.6% ▲	2.1% ▼	13.5% ▼	14.5% ▲	13% ▲
Q1 2019 TOTAL	\$562,450	192	364	0.53	\$500,000
% CHANGE (+/-)	2.2% ▲	67.2% ▲	40.1% ▲	18.9% ▲	13.6% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
DETACHED HOMES	337	381	▼
TOWN/LINK HOMES	93	99	▼
APARTMENT/CONDO	80	110	▼
TOTAL	510	590	▼
SALES TO NEW RATIO	0.63	0.55	▲

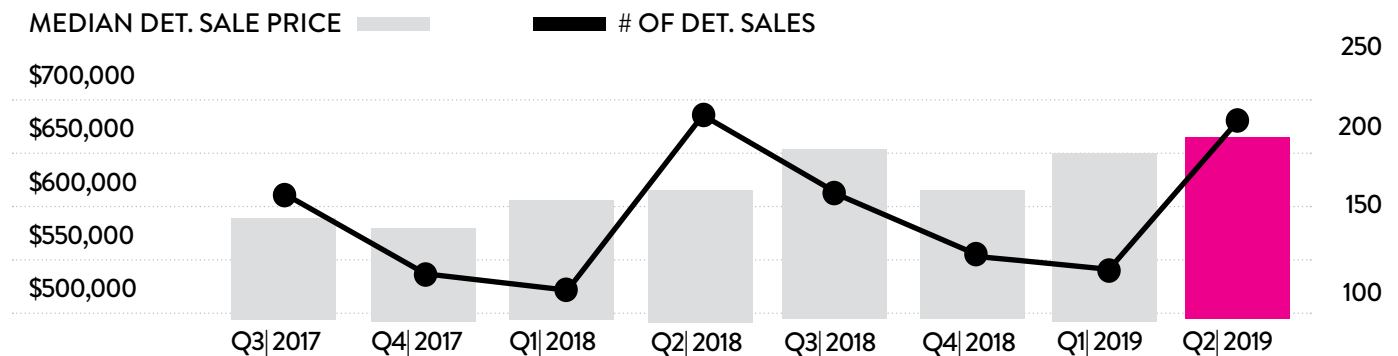
Q2 SALES BY INVENTORY TYPE



\$638,500
DETACHED MEDIAN SALE

\$443,400
TOWN/LINK MEDIAN SALE


\$309,000
APMNT/CONDO MEDIAN SALE



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TW



2019

COMPLETE DATA

The Townships



ELORA
MILL
INN

COMPLETE DATA

The Townships

INSIDE THE NUMBERS

Outside the big cities did it's thing in the spring.

Q2 is always the make or break Q in the Townships. Warmer weather melts the snow and simultaneously heats up the spring market. This was to be a telling time as these smaller markets adjust to the peripheral new normal in the city. Our grade for the Townships? Full marks for staying the course.

Tempered new construction options, coupled with adjusted expectations from Sellers set the tone for a solid spring season. The key is the 0.58 sales to new listing ratio across all of the Townships. A balanced market through spring should see continued activity through the busy summer months.

The busy markets are not just a city thing anymore, the individual Township markets have each found their strength as the Region's rural areas continue to grow.

Q2 | 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.

0.58

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

	Q2 2019	% Chg (Y)	Q2 2018	% Chg (Q)	Q1 2019
MEDIAN DET. SALE PRICE	\$620,000	15.9% ▲	\$535,000	0.5% ▼	\$623,250
NUMBER OF NEW SALES	516	20.6% ▲	428	105% ▲	252
MEDIAN DAYS ON MARKET	15	=	15	3 days ▼	18
NEW INVENTORY	886	25.8% ▲	704	81.9% ▲	487

UP & DOWN quick review

▲14%

Y/Y increase in Centre Wellington median sale price. This is solidly the new normal in the North.

▼22%

Y/Y decrease in the North Dumfries sales to new listing ratio. The slide into a Buyer's market continues.

▲45%

Y/Y jump in the number of Wilmot sales. As listings increase, sales jump even higher.

▼3%

Q/Q decrease in the Guelph Eramosa median sale price. Stayed in-line with adjusted asking prices.

▲9%

Y/Y increase in the Woolwich sales to new listing ratio. Did we find the comfort zone in a balanced market?

▼5%

Y/Y decrease in the Puslinch median list price. Sellers are coming back down to where the Buyers are.

▲100%

Q/Q increase in the number of Guelph Eramosa new inventory. Selling season after the snow was a success.

▼44%

Y/Y decrease in Wellesley sales to new listing ratio. The adjustment into a Buyer's market continued.

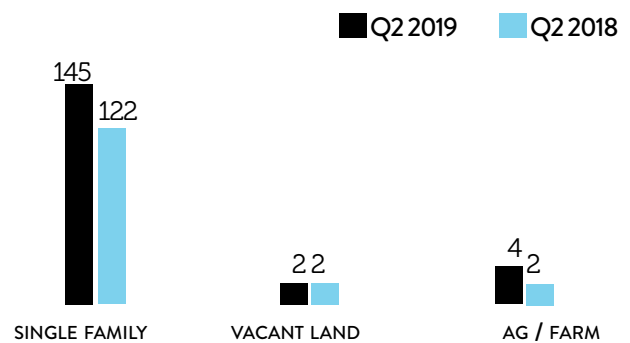
CENTRE WELLINGTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$599,000	151	216	0.70	\$535,000
Q2 2018 TOTAL	\$539,900	126	179	0.70	\$468,750
% CHANGE (+/-)	10.9% ▲	19.8% ▲	20.7% ▲	=	14.1% ▲
Q1 2019 TOTAL	\$579,900	71	138	0.51	\$499,000
% CHANGE (+/-)	3.3% ▲	113% ▲	56.5% ▲	372% ▲	7.2% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	202	168	▲
VACANT LAND	10	3	▲
AG / FARM	4	8	▼
TOTAL	216	179	▲
SALES TO NEW RATIO	0.70	0.70	=

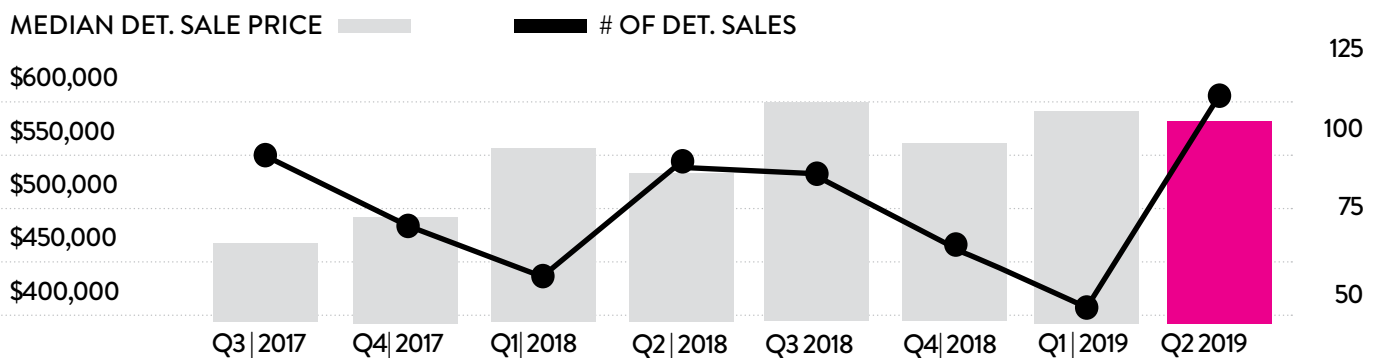
Q2 SALES BY INVENTORY TYPE



\$530,000
SINGLE FAMILY MEDIAN

\$915,000
VACANT LAND MEDIAN

\$1,258,000
AG / FARM MEDIAN



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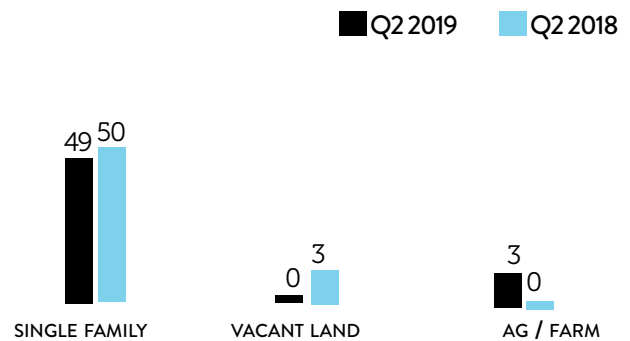
GUELPH ERAMOSA

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$749,900	52	108	0.48	\$715,000
Q2 2018 TOTAL	\$745,000	53	109	0.49	\$742,000
% CHANGE (+/-)	0.66% ▲	1.9% ▼	0.9% ▼	2% ▼	3.6% ▼
Q1 2019 TOTAL	\$765,000	26	61	0.43	\$733,500
% CHANGE (+/-)	2% ▼	100% ▲	77% ▲	11.6% ▲	2.5% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	95	104	▼
VACANT LAND	5	5	=
AG / FARM	8	1	▲
TOTAL	108	109	▼
SALES TO NEW RATIO	0.48	0.49	▼

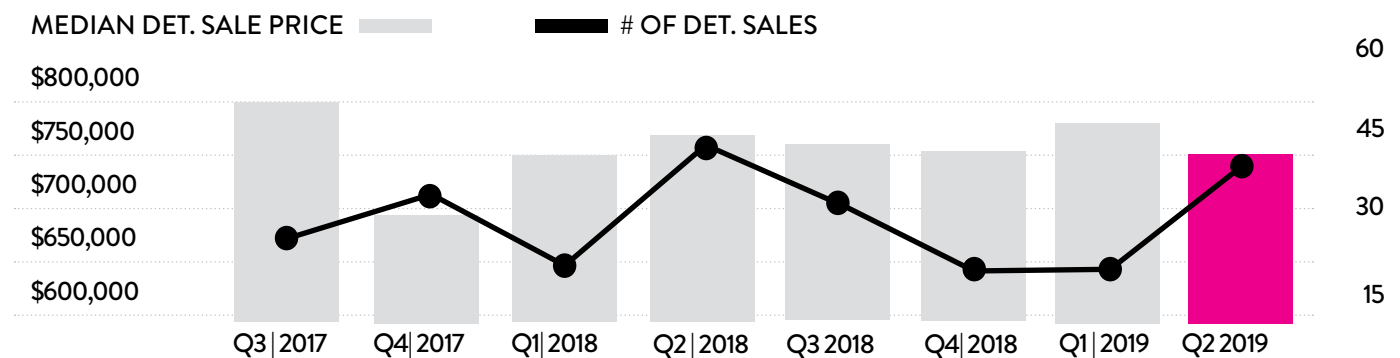
Q2 SALES BY INVENTORY TYPE



\$705,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$1,575,000
AG / FARM MEDIAN



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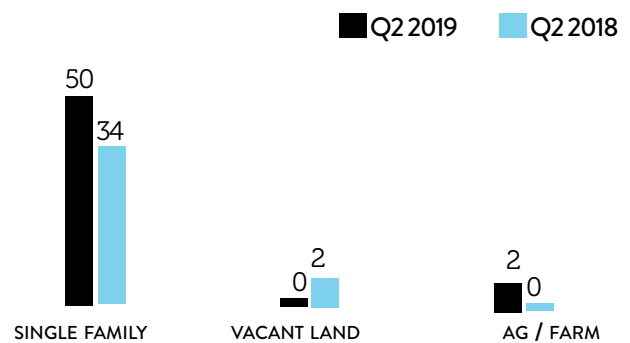
NORTH DUMFRIES

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$569,900	52	123	0.42	\$590,000
Q2 2018 TOTAL	\$619,900	36	66	0.54	\$602,250
% CHANGE (+/-)	8.1% ▼	44.4% ▲	86.4% ▲	22.2% ▼	2% ▼
Q1 2019 TOTAL	\$597,900	22	44	0.50	\$598,750
% CHANGE (+/-)	4.7% ▼	136% ▲	179% ▲	16% ▼	1.5% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	116	63	▲
VACANT LAND	3	3	=
AG / FARM	4	0	▲
TOTAL	123	66	▲
SALES TO NEW RATIO	0.42	0.54	▼

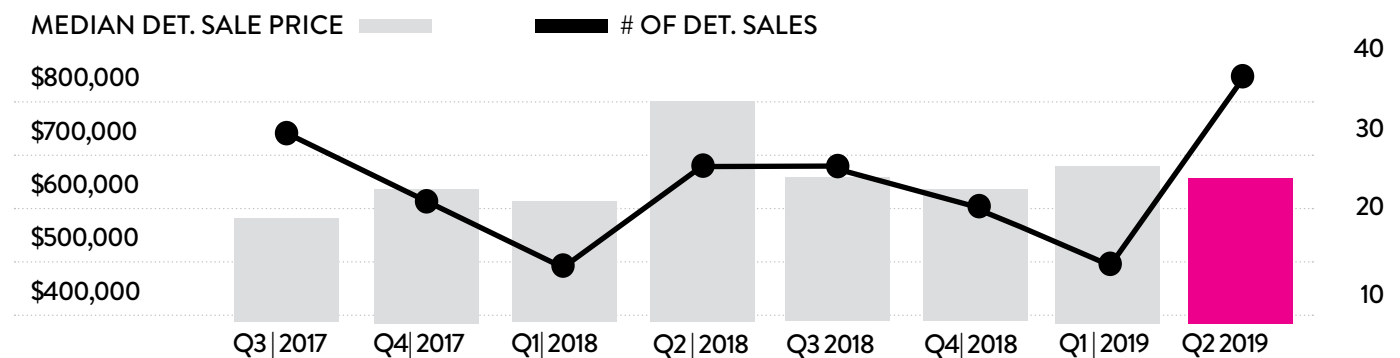
Q2 SALES BY INVENTORY TYPE



\$575,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$1,175,500
AG / FARM MEDIAN



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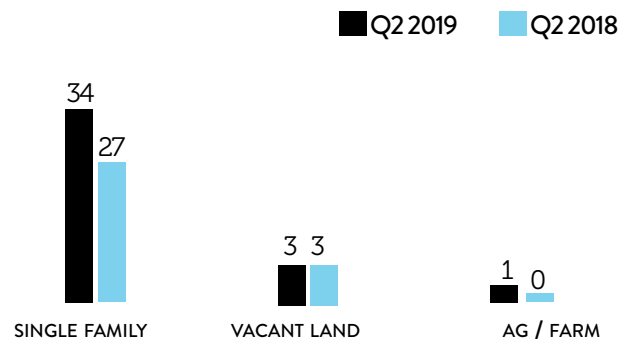
TOWNSHIP OF PUSLINCH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$1,124,500	38	94	0.40	\$920,000
Q2 2018 TOTAL	\$1,187,000	30	68	0.44	\$750,500
% CHANGE (+/-)	5.3% ▼	26.7% ▲	38.2% ▲	91% ▼	22.6% ▲
Q1 2019 TOTAL	\$829,900	31	75	0.41	\$944,000
% CHANGE (+/-)	35.5% ▲	22.6% ▲	25.3% ▲	2.4% ▼	2.5% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	81	52	▲
VACANT LAND	10	13	▼
AG / FARM	3	3	=
TOTAL	94	68	▲
SALES TO NEW RATIO	0.40	0.44	▼

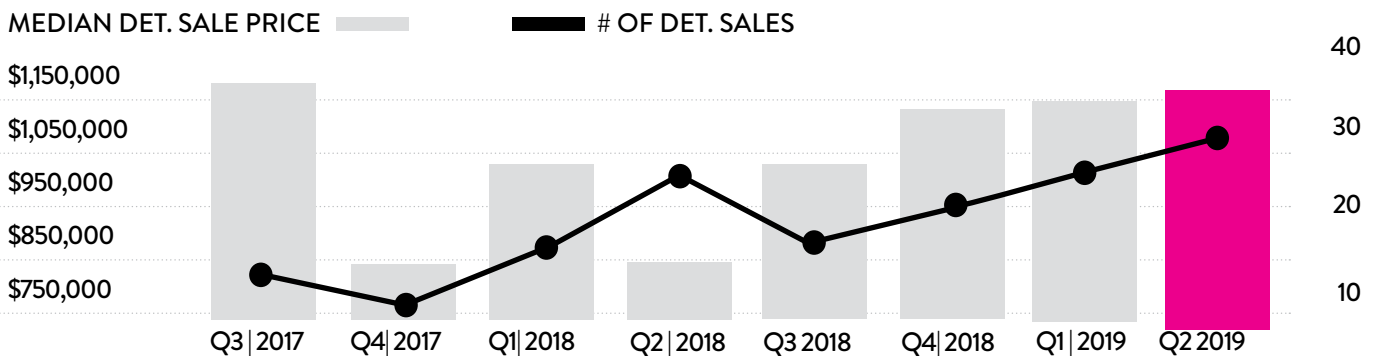
Q2 SALES BY INVENTORY TYPE



\$929,500
SINGLE FAMILY MEDIAN

\$495,000
VACANT LAND MEDIAN

\$1,105,000
AG / FARM MEDIAN



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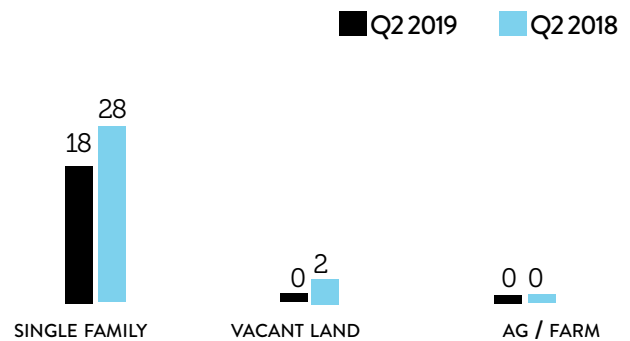
TOWNSHIP OF WELLESLEY

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$679,900	18	41	0.44	\$627,500
Q2 2018 TOTAL	\$639,700	30	38	0.79	\$515,500
% CHANGE (+/-)	6.3% ▲	40% ▼	79% ▲	44.3% ▼	21.7% ▲
Q1 2019 TOTAL	\$670,000	20	34	0.59	\$638,750
% CHANGE (+/-)	1.5% ▲	10% ▼	20.6% ▲	25.4% ▼	1.8% ▼

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	39	38	▲
VACANT LAND	1	0	▲
AG / FARM	1	0	▲
TOTAL	41	38	▲
SALES TO NEW RATIO	0.44	0.79	▼

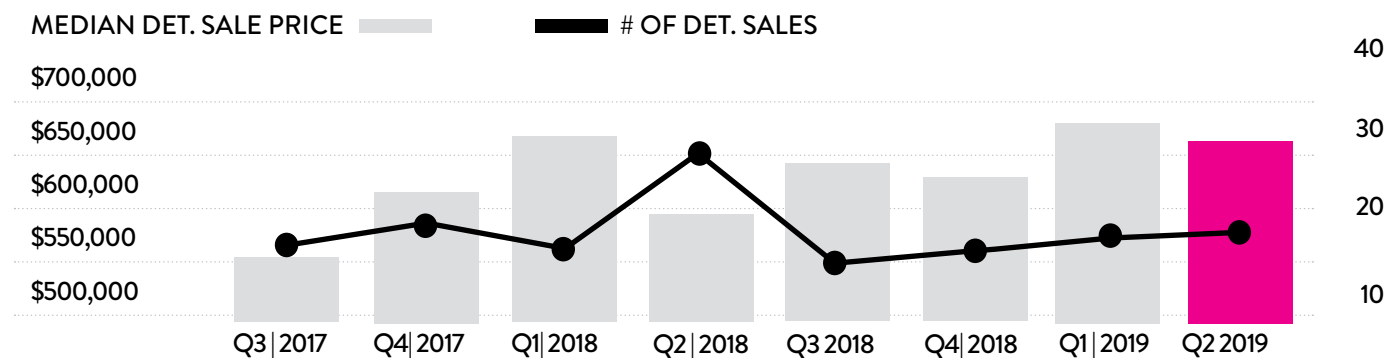
Q2 SALES BY INVENTORY TYPE



\$627,500
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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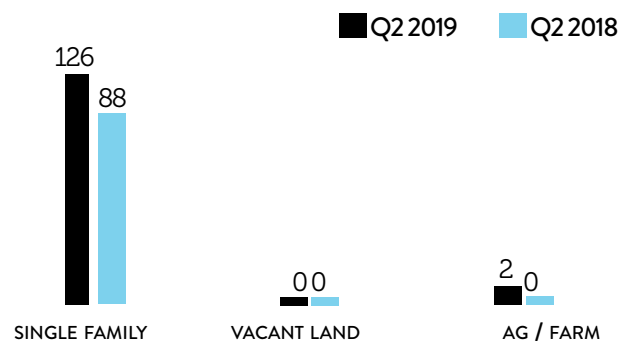
TOWNSHIP OF WILMOT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$599,900	128	181	0.71	\$546,000
Q2 2018 TOTAL	\$568,900	88	149	0.59	\$528,000
% CHANGE (+/-)	5.4% ▲	45.4% ▲	21.4% ▲	20.3% ▲	3.4% ▲
Q1 2019 TOTAL	\$639,900	42	95	0.44	\$478,950
% CHANGE (+/-)	6.2% ▼	20.4% ▲	90.5% ▲	61.4% ▲	14% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	173	145	▲
VACANT LAND	3	1	▲
AG / FARM	5	3	▲
TOTAL	181	149	▲
SALES TO NEW RATIO	0.71	0.59	▼

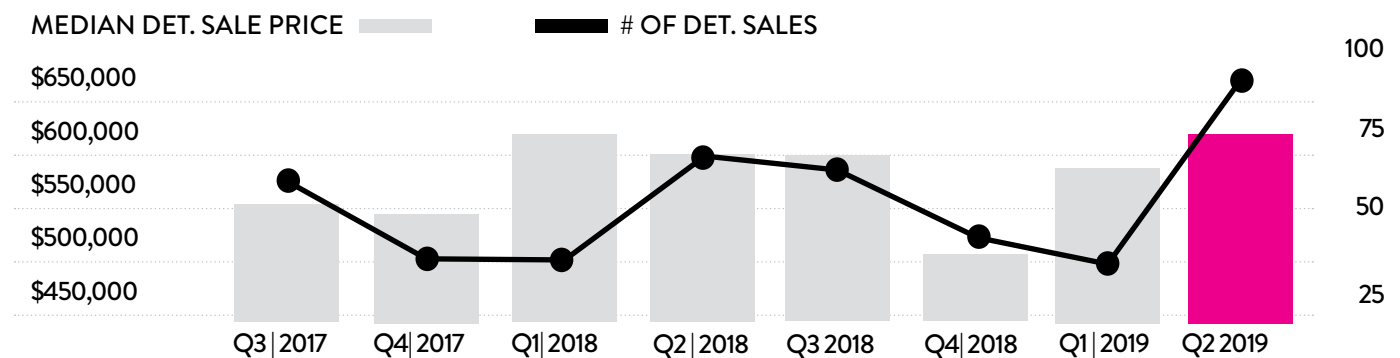
Q2 SALES BY INVENTORY TYPE



\$545,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$992,500
AG / FARM MEDIAN



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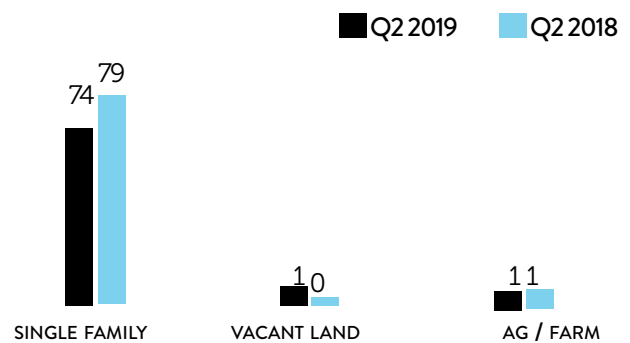
TOWNSHIP OF WOOLWICH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2019 TOTAL	\$560,000	76	119	0.64	\$541,500
Q2 2018 TOTAL	\$534,900	80	135	0.59	\$525,000
% CHANGE (+/-)	4.7% ▲	5% ▼	11.9% ▼	8.5% ▲	3.1% ▲
Q1 2019 TOTAL	\$575,900	53	83	0.64	\$540,400
% CHANGE (+/-)	2.8% ▼	43.4% ▲	43.4% ▲	=	0.2% ▲

Q2 NEW INVENTORY

	Q2 2019	Q2 2018	TREND
SINGLE FAMILY	118	134	▼
VACANT LAND	1	1	=
AG / FARM	0	0	=
TOTAL	119	135	▼
SALES TO NEW RATIO	0.64	0.59	▲

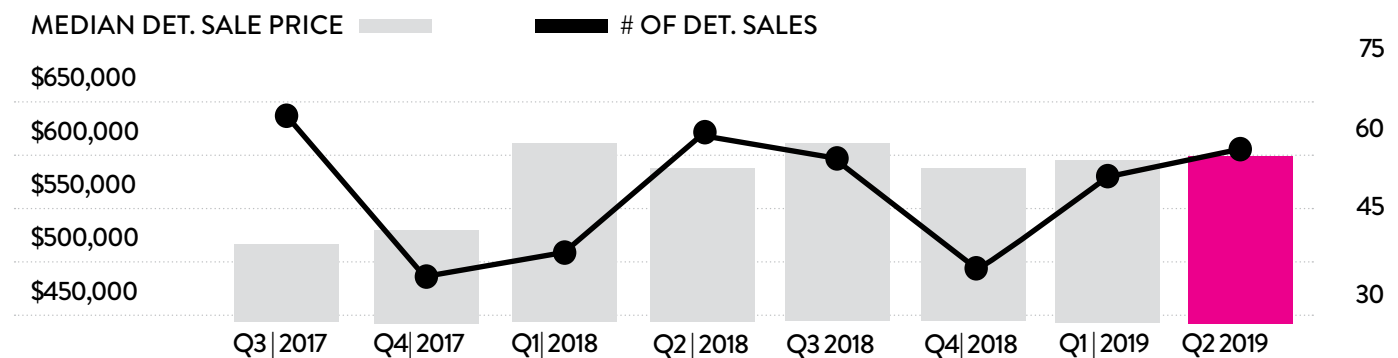
Q2 SALES BY INVENTORY TYPE



\$541,500
SINGLE FAMILY MEDIAN

\$460,000
VACANT LAND MEDIAN

\$1,700,000
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

