

TW 3 2019

Leading

REAL ESTATE
COMPANIES
OF THE WORLD™

TRILLIUMWEST

REAL ESTATE BROKERAGE

TRILLIUMWEST
QUARTERLY DATA REPORT

TABLE OF
contents

City of Cambridge	CAMBRIDGE OVERVIEW	4
	HESPELER CAMBRIDGE	5
	PRESTON CAMBRIDGE	6
	NORTH GALT CAMBRIDGE	7
	EAST GALT CAMBRIDGE	8
	WEST GALT CAMBRIDGE	9
City of Guelph	GUELPH OVERVIEW	11
	DOWNTOWN GUELPH	12
	MIDTOWN GUELPH	13
	SOUTH GUELPH	14
	EAST GUELPH	15
	WEST GUELPH	16
Cities of Kitchener + Waterloo	KW OVERVIEW	19
	EAST KITCHENER	20
	WEST KITCHENER	21
	DOWNTOWN KITCHENER	22
	UPTOWN WATERLOO	23
	EAST WATERLOO	24
The Townships	THE TOWNSHIPS OVERVIEW	27
	CENTRE WELLINGTON	28
	GUELPH ERAMOSIA	29
	NORTH DUMFRIES	30
	TOWNSHIP OF PUSLINCH	31
	TOWNSHIP OF WELLESLEY	32
About TrilliumWest	TOWNSHIP OF WILMOT	33
	TOWNSHIP OF WOOLWICH	34
	ABOUT TRILLIUMWEST	35

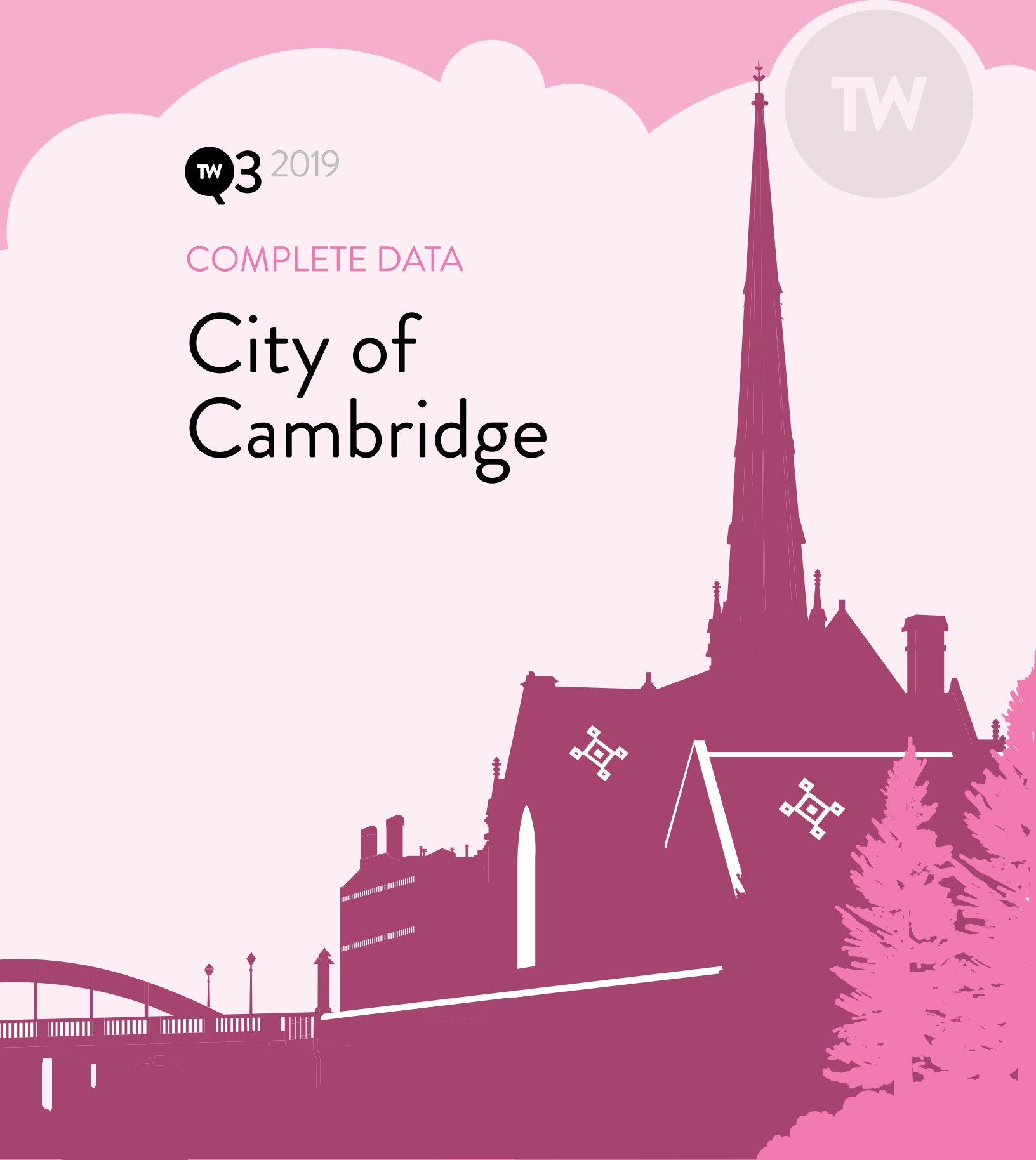


TW

TW 3 2019

COMPLETE DATA

City of Cambridge



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

City of Cambridge

Q3 | 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.

0.70

INSIDE THE NUMBERS

Blowing right by that big barrier.

Heading out of a precedent-setting Q2, the big question in Cambridge was - can this new world of life above a 500k median sale price threshold, hold? Well, Q3 answered that with a resounding 'you bet it can'.

How about this? In Q3, both West Galt and Hespeler saw median sale prices actually surpass consistent Regional leaders like Downtown and East Guelph. It's not just a close-to-the-401-GTA-buyer new home thing, it's officially a full-on Cambridge thing now.

Too big too quick or is there sustainability here that will last through a typically slower Q4? Strap in friends, it should be an interesting ride to finish a huge 2019.

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

	Q3 2019	% Chg (Y)	Q3 2018	% Chg (Q)	Q2 2019
MEDIAN DET. SALE PRICE	\$526,250	10.8% ▲	\$475,000	1.2% ▲	\$520,000
NUMBER OF NEW SALES	572	29.4% ▲	442	14% ▼	665
MEDIAN DAYS ON MARKET	14	5 days ▼	19	1 day ▲	13
NEW INVENTORY	814	15% ▲	708	16.2% ▼	972

UP & DOWN quick review

▲76% Y/Y increase in the number of sales in Hespeler. Still rolling in the fastest growing area in the Region.

▲8% Y/Y increase in the East Galt median sale price. The Region's value play is getting well played.

▲12% Y/Y increase in the North Galt sales to new listing ratio. No escaping the heat of a hot summer here.

▲11% Y/Y increase in the Preston median list price. The biggest growth in town. Again.

▼7% Y/Y decrease in the West Galt median list price. The roller coaster of one year ago is over.

▼0% Y/Y adjustment in the North Galt median list price. Flat-line figures as buyers reach their limits.

▼1% Q/Q decrease in East Galt new inventory. Sellers kept playing a winning hand all summer.

▼20% Y/Y decrease in Preston new inventory. Less to buy, and big price jumps had no choice but to follow.

All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

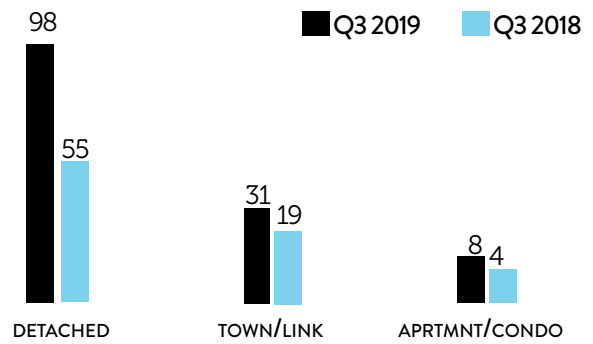
HESPELER CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$569,900	137	193	0.71	\$529,000
Q3 2018 TOTAL	\$534,900	78	131	0.60	\$479,950
% CHANGE (+/-)	6.5% ▲	75.6% ▲	47.3% ▲	18.3% ▲	10.2% ▲
Q2 2019 TOTAL	\$529,900	139	231	0.60	\$519,900
% CHANGE (+/-)	7.5% ▲	14% ▼	28.8% ▼	18.3% ▲	1.7% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	149	104	▲
TOWN/LINK HOMES	37	24	▲
APARTMENT/CONDO	7	3	▲
TOTAL	193	131	▲
SALES TO NEW RATIO	0.71	0.60	▲

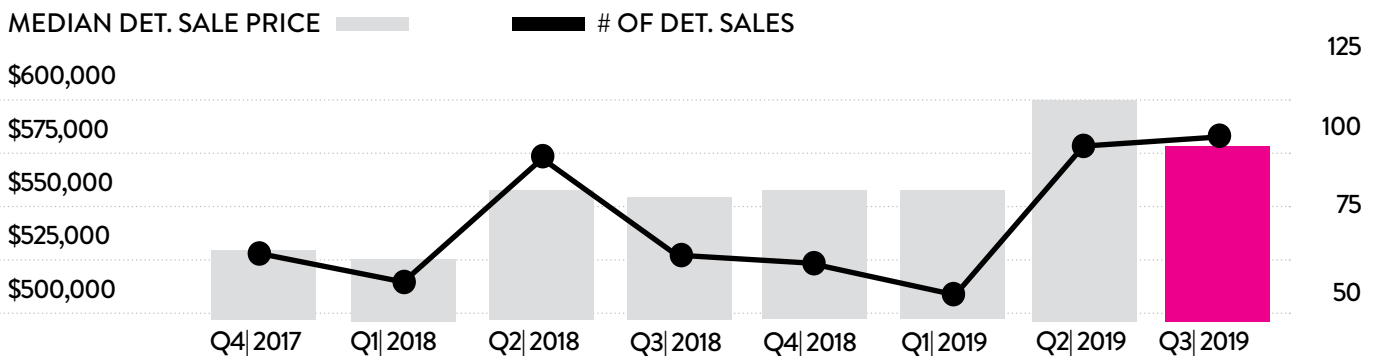
Q3 SALES BY INVENTORY TYPE



\$563,950
DETACHED MEDIAN SALE

\$425,000
TOWN/LINK MEDIAN SALE

\$320,625
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

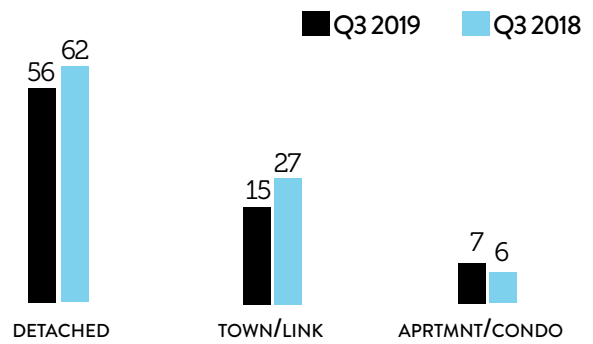
PRESTON CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$476,500	78	122	0.64	\$453,000
Q3 2018 TOTAL	\$429,900	95	153	0.62	\$400,900
% CHANGE (+/-)	10.8% ▲	17.9% ▼	20.2% ▼	3.2% ▲	13% ▲
Q2 2019 TOTAL	\$477,500	109	156	0.70	\$445,000
% CHANGE (+/-)	0.2% ▼	28.4% ▼	21.8% ▼	8.6% ▼	1.8% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	89	100	▼
TOWN/LINK HOMES	20	43	▼
APARTMENT/CONDO	13	10	▲
TOTAL	122	153	▼
SALES TO NEW RATIO	0.64	0.62	▲

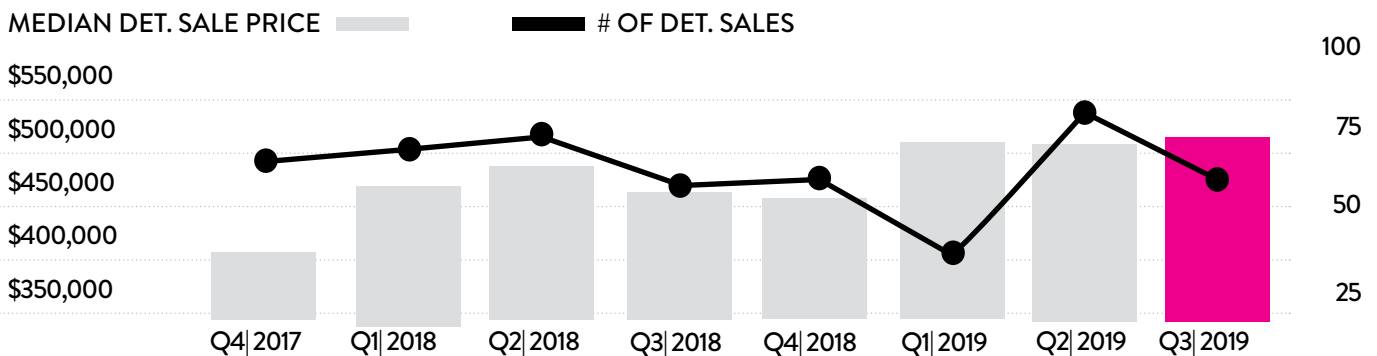
Q3 SALES BY INVENTORY TYPE



\$493,000
DETACHED MEDIAN SALE

\$410,000
TOWN/LINK MEDIAN SALE

\$299,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

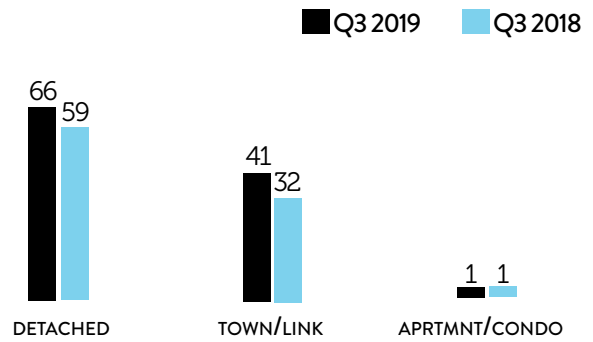
NORTH GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$499,900	108	139	0.78	\$471,250
Q3 2018 TOTAL	\$499,900	92	134	0.69	\$465,000
% CHANGE (+/-)	=	14.8% ▲	3.7% ▲	11.6% ▲	1.3% ▲
Q2 2019 TOTAL	\$479,900	152	197	0.77	\$465,500
% CHANGE (+/-)	4.2% ▲	29% ▼	29.4% ▼	1.3% ▲	1.2% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	89	84	▲
TOWN/LINK HOMES	48	48	=
APARTMENT/CONDO	2	2	=
TOTAL	139	134	▲
SALES TO NEW RATIO	0.78	0.69	▲

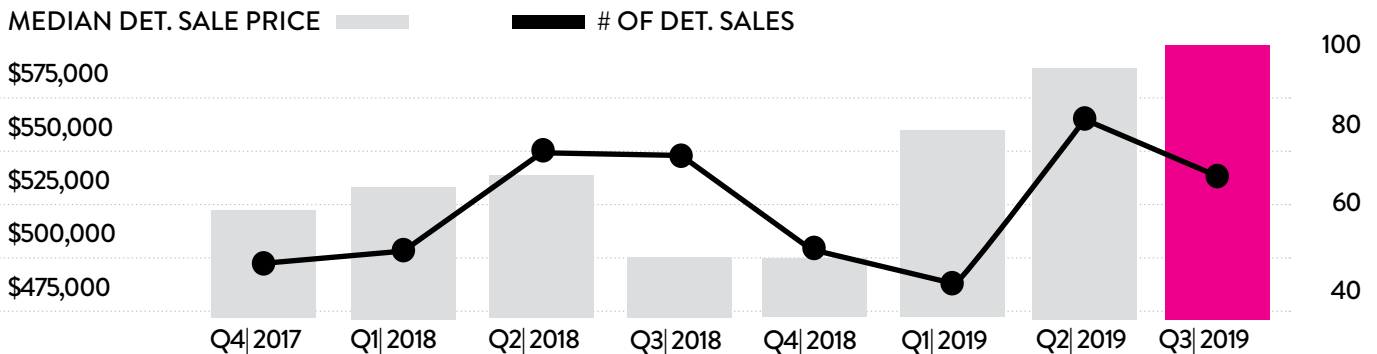
Q3 SALES BY INVENTORY TYPE



\$582,500
DETACHED MEDIAN SALE

\$401,000
TOWN/LINK MEDIAN SALE

\$405,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

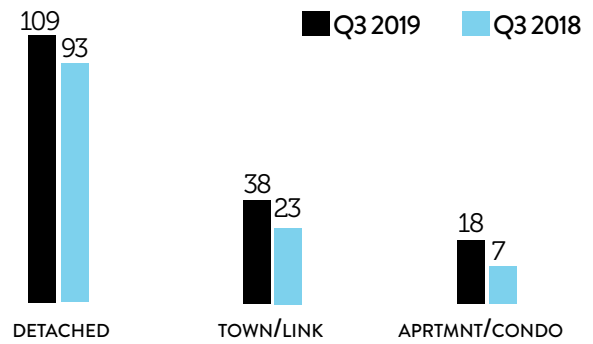
EAST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$459,900	165	231	0.71	\$447,500
Q3 2018 TOTAL	\$429,900	123	184	0.67	\$415,000
% CHANGE (+/-)	7% ▲	34.1% ▲	25.5% ▲	6% ▲	78% ▲
Q2 2019 TOTAL	\$449,900	154	233	0.66	\$432,500
% CHANGE (+/-)	2.2% ▲	7.1% ▲	0.9% ▼	76% ▲	3.5% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	164	141	▲
TOWN/LINK HOMES	42	36	▲
APARTMENT/CONDO	25	7	▲
TOTAL	231	184	▲
SALES TO NEW RATIO	0.71	0.67	▲

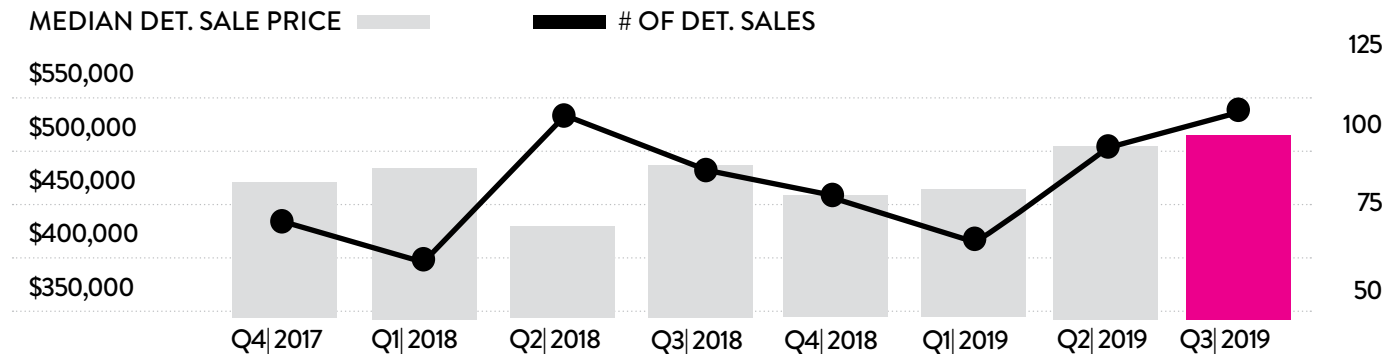
Q3 SALES BY INVENTORY TYPE



\$485,000
DETACHED MEDIAN SALE

\$412,500
TOWN/LINK MEDIAN SALE

\$338,500
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

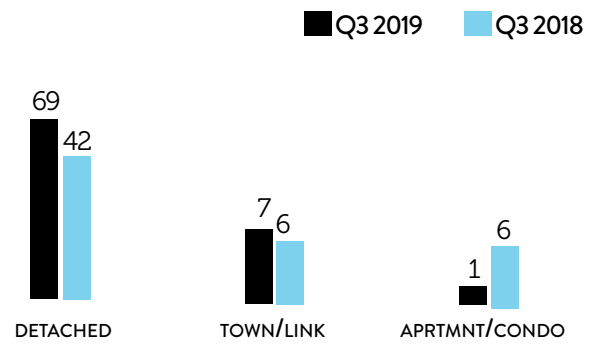
WEST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$539,900	84	129	0.65	\$508,000
Q3 2018 TOTAL	\$577,400	54	106	0.51	\$476,000
% CHANGE (+/-)	6.5% ▼	55.5% ▲	21.7% ▲	27.4% ▲	6.7% ▲
Q2 2019 TOTAL	\$524,900	111	155	0.72	\$480,000
% CHANGE (+/-)	2.8% ▲	24.3% ▼	16.8% ▼	9.7% ▼	5.8% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	111	82	▲
TOWN/LINK HOMES	17	17	=
APARTMENT/CONDO	1	7	▼
TOTAL	129	106	▲
SALES TO NEW RATIO	0.65	0.51	▲

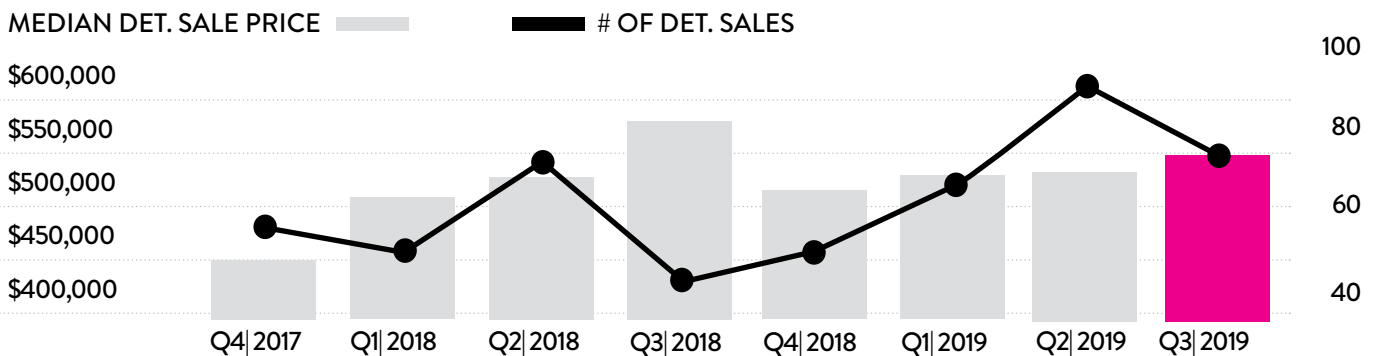
Q3 SALES BY INVENTORY TYPE



\$523,500
DETACHED MEDIAN SALE

\$415,000
TOWN/LINK MEDIAN SALE

\$300,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.



TW



TW 3 2019

COMPLETE DATA

City of Guelph



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

City of Guelph

Q3 | 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.

0.70

INSIDE THE NUMBERS

Consistent, but with a new twist.

As the turbulent peaks and valleys of previous Q's appear to be in the rearview mirror, all areas of Guelph are settling into their own individual new realities. And for the third Q in a row, Guelph did what it was supposed to do - grow, but with measured predictability.

One of the more interesting sub-markets in the city is really beginning to take shape, as the massive surge of South Guelph new-build condos is really being realized statistically. Now home to the lowest, yes you read the right, median sale price in town. For the first time in history the number of detached new listings equaled that of condo new listings for an entire Q.

Looking for the lowest prices in town - look to the South-side. When is the last time you could say that? The new norm or grab a 'deal' while you can?

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

	Q3 2019	% Chg (Y)	Q3 2018	% Chg (Q)	Q2 2019
MEDIAN DET. SALE PRICE	\$590,000	5.3% ▲	\$560,000	0.84% ▼	\$595,000
NUMBER OF NEW SALES	610	10.9% ▲	550	14.3% ▼	712
MEDIAN DAYS ON MARKET	17	=	17	2 days ▼	15
NEW INVENTORY	872	6.3% ▲	820	17.7% ▼	1060

UP & DOWN quick review

▲18%

Y/Y increase in the Midtown median sale price. Buyers are flocking back to the leafy streets.

▼18%

Y/Y reduction in the South Guelph median sale price. The condo to detached ratio is fully realized.

▲24%

Y/Y increase in the South Guelph sales to new listing ratio. Take notice as this lead indicator tells the story.

▼3%

Q/Q reduction in the Downtown median sale price. The core is settling into a comfort zone once again.

▲11%

Y/Y increase in the East Guelph median list price. Seller confidence sees a big bounce back in Q3.

▼2%

Q/Q drop in the West Guelph median sale price. The long identity journey appears to be over.

▲6%

Y/Y increase in the Downtown median sale price. The model of consistency does what it is expected.

▼23%

Q/Q reduction in the North Guelph sales to new listing ratio. Some sellers still search for answers.

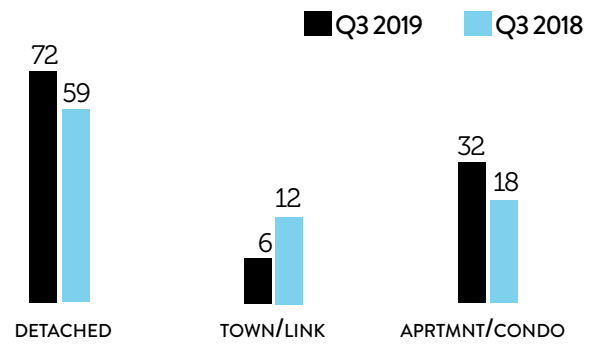
DOWNTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$519,900	110	158	0.69	\$503,375
Q3 2018 TOTAL	\$515,000	89	136	0.65	\$475,500
% CHANGE (+/-)	0.95% ▲	23.6% ▲	16.2% ▲	6.1% ▲	5.9% ▲
Q2 2019 TOTAL	\$549,900	119	185	0.64	\$520,000
% CHANGE (+/-)	5.4% ▼	7.6% ▼	14.6% ▼	7.8% ▲	3.2% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	92	98	▼
TOWN/LINK HOMES	15	13	▲
APARTMENT/CONDO	51	25	▲
TOTAL	158	136	▲
SALES TO NEW RATIO	0.69	0.65	▲

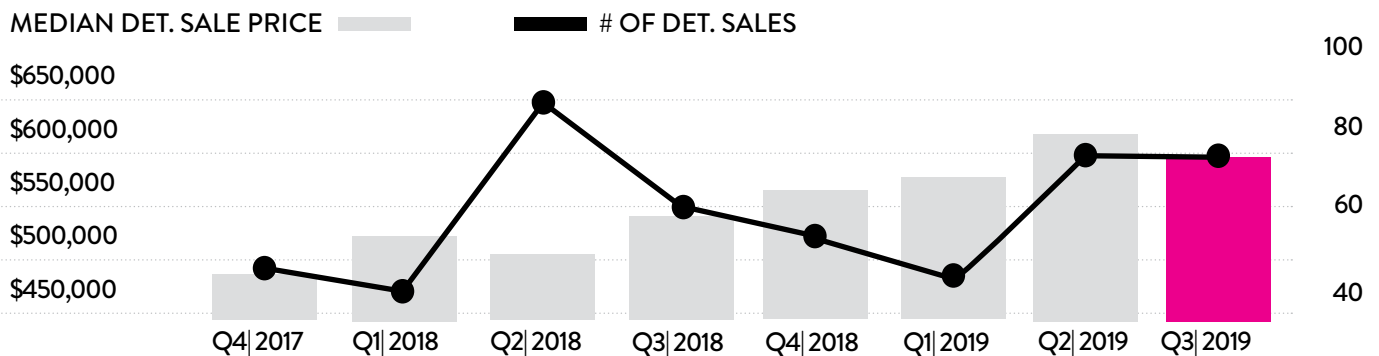
Q3 SALES BY INVENTORY TYPE



\$563,450
DETACHED MEDIAN SALE

\$464,750
TOWN/LINK MEDIAN SALE

\$388,900
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

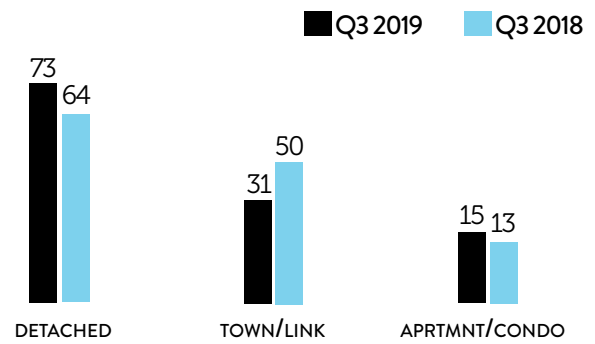
MIDTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$607,450	119	188	0.63	\$580,000
Q3 2018 TOTAL	\$554,900	127	197	0.64	\$491,000
% CHANGE (+/-)	9.5% ▲	6.3% ▼	4.6% ▼	1.6% ▼	18.1% ▲
Q2 2019 TOTAL	\$619,900	136	228	0.60	\$577,000
% CHANGE (+/-)	2% ▼	12.5% ▼	17.5% ▼	5% ▲	0.51% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	120	116	▲
TOWN/LINK HOMES	46	59	▼
APARTMENT/CONDO	22	21	▲
TOTAL	188	197	▼
SALES TO NEW RATIO	0.63	0.64	▼

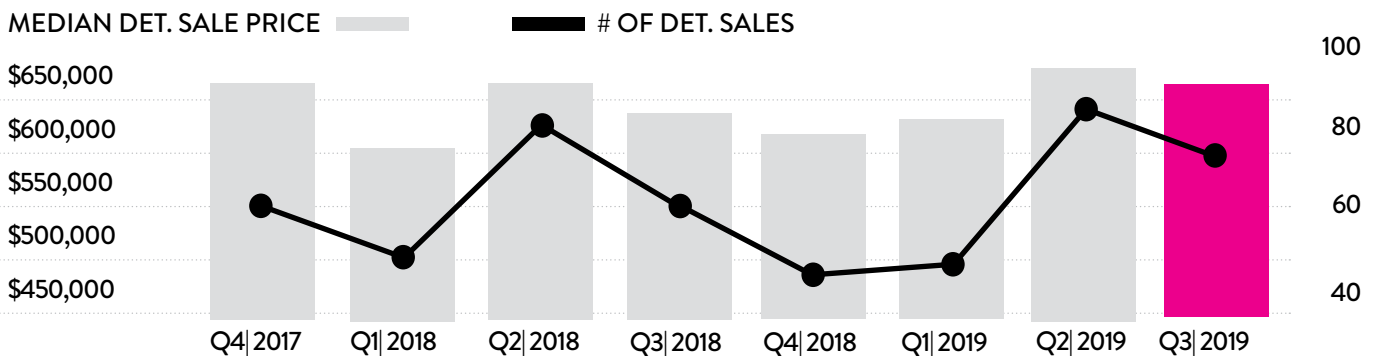
Q3 SALES BY INVENTORY TYPE



\$645,000
DETACHED MEDIAN SALE

\$430,000
TOWN/LINK MEDIAN SALE

\$295,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

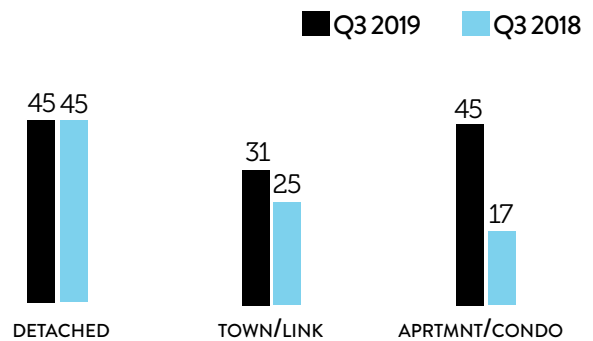
SOUTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$609,900	121	167	0.72	\$480,000
Q3 2018 TOTAL	\$599,500	87	151	0.58	\$585,100
% CHANGE (+/-)	17% ▲	39.1% ▲	10.6% ▲	24.1% ▲	18% ▼
Q2 2019 TOTAL	\$450,000	135	212	0.64	\$535,000
% CHANGE (+/-)	35.5% ▲	10.4% ▼	21.2% ▼	12.5% ▲	10.3% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	82	76	▲
TOWN/LINK HOMES	40	35	▲
APARTMENT/CONDO	45	40	▲
TOTAL	167	151	▲
SALES TO NEW RATIO	0.72	0.58	▲

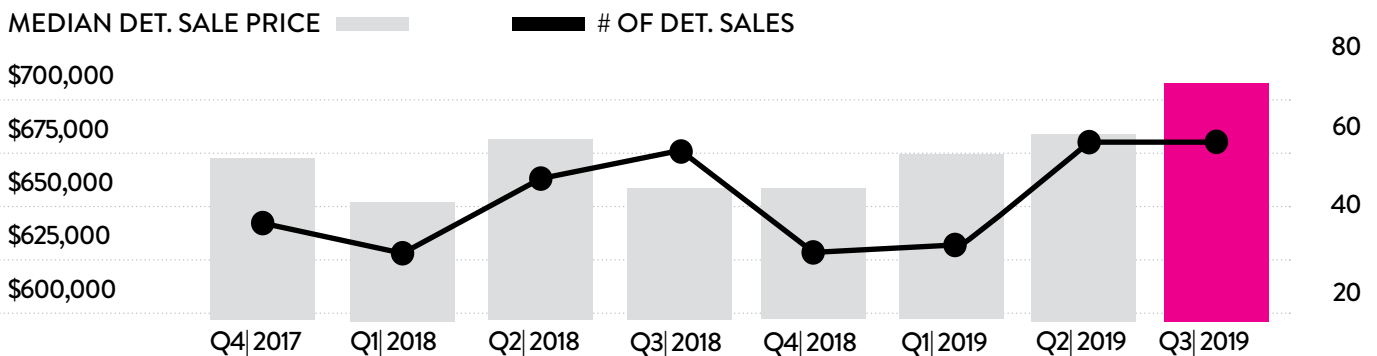
Q3 SALES BY INVENTORY TYPE



\$695,000
DETACHED MEDIAN SALE

470,000
TOWN/LINK MEDIAN SALE

\$347,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

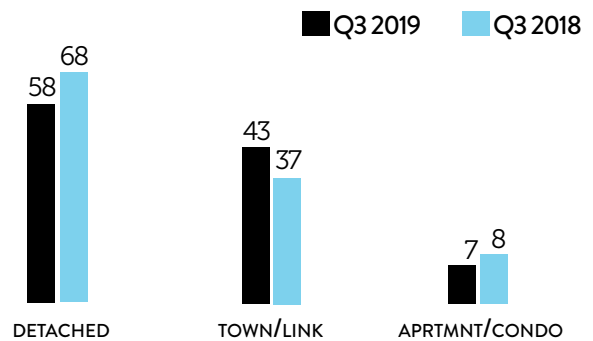
EAST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$542,400	108	144	0.75	\$513,000
Q3 2018 TOTAL	\$489,900	113	129	0.88	\$482,000
% CHANGE (+/-)	10.7% ▲	4.4% ▼	11.6% ▲	14.8% ▼	6.4% ▲
Q2 2019 TOTAL	\$525,000	137	189	0.72	\$500,000
% CHANGE (+/-)	3.3% ▲	21.2% ▼	23.8% ▼	4.2% ▲	2.6% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	87	75	▲
TOWN/LINK HOMES	52	43	▲
APARTMENT/CONDO	5	11	▼
TOTAL	144	129	▲
SALES TO NEW RATIO	0.75	0.88	▼

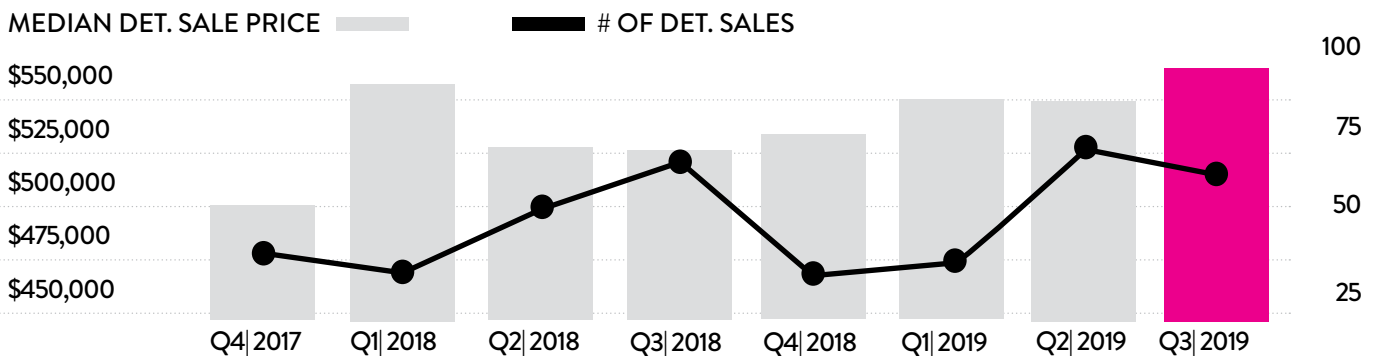
Q3 SALES BY INVENTORY TYPE



\$562,500
DETACHED MEDIAN SALE

\$495,500
TOWN/LINK MEDIAN SALE

\$300,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

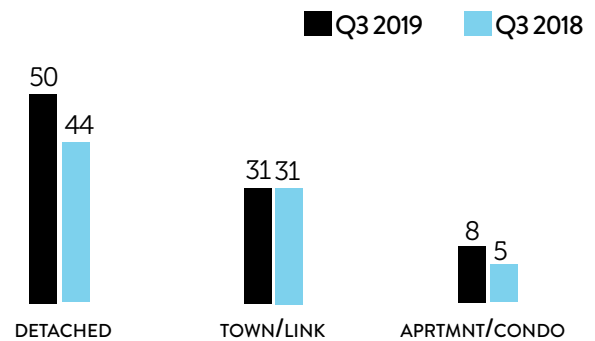
WEST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$509,900	89	111	0.80	\$500,000
Q3 2018 TOTAL	\$476,250	80	118	0.67	\$448,450
% CHANGE (+/-)	7.1% ▲	11.2% ▲	6% ▼	19.4% ▲	11.5% ▲
Q2 2019 TOTAL	\$525,000	103	145	0.71	\$510,000
% CHANGE (+/-)	2.9% ▼	13.6% ▼	23.4% ▼	12.7% ▲	2% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	68	68	=
TOWN/LINK HOMES	33	41	▼
APARTMENT/CONDO	10	9	▲
TOTAL	111	118	▼
SALES TO NEW RATIO	0.80	0.67	▲

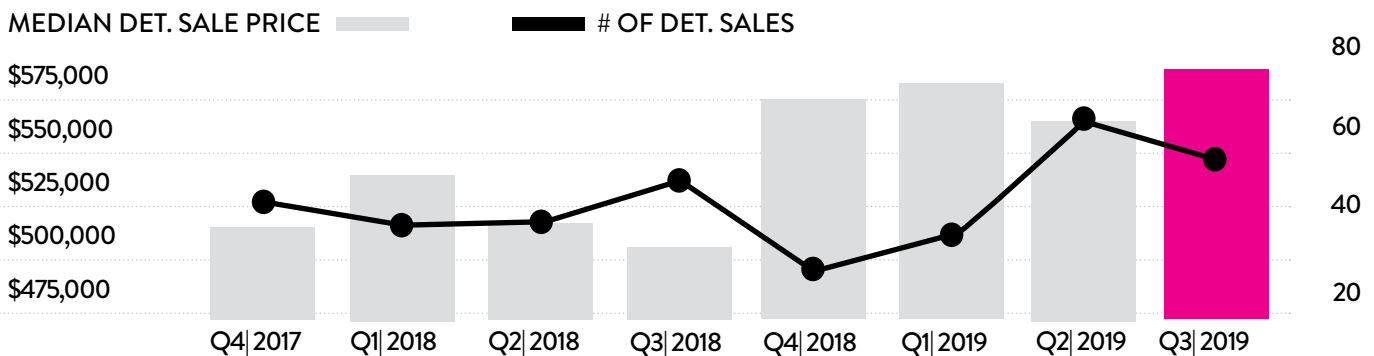
Q3 SALES BY INVENTORY TYPE



\$569,500
DETACHED MEDIAN SALE

\$390,000
TOWN/LINK MEDIAN SALE

\$251,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

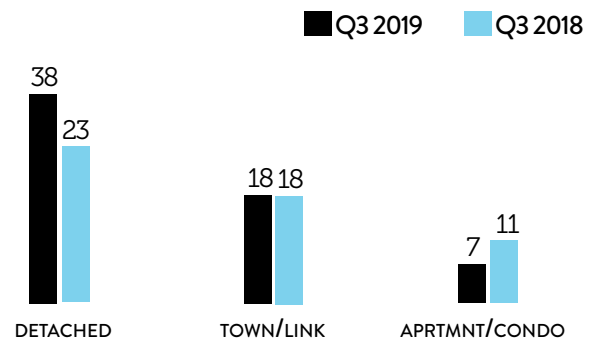
NORTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$509,900	63	102	0.62	\$505,000
Q3 2018 TOTAL	\$464,950	52	86	0.60	\$463,750
% CHANGE (+/-)	9.7% ▲	21.1% ▲	18.6% ▲	3.3% ▲	8.9% ▲
Q2 2019 TOTAL	\$532,450	86	106	0.81	\$514,450
% CHANGE (+/-)	4.2% ▼	26.7% ▼	3.8% ▼	23.4% ▼	1.8% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	62	37	▲
TOWN/LINK HOMES	25	35	▼
APARTMENT/CONDO	15	14	▲
TOTAL	102	86	▲
SALES TO NEW RATIO	0.81	0.60	▲

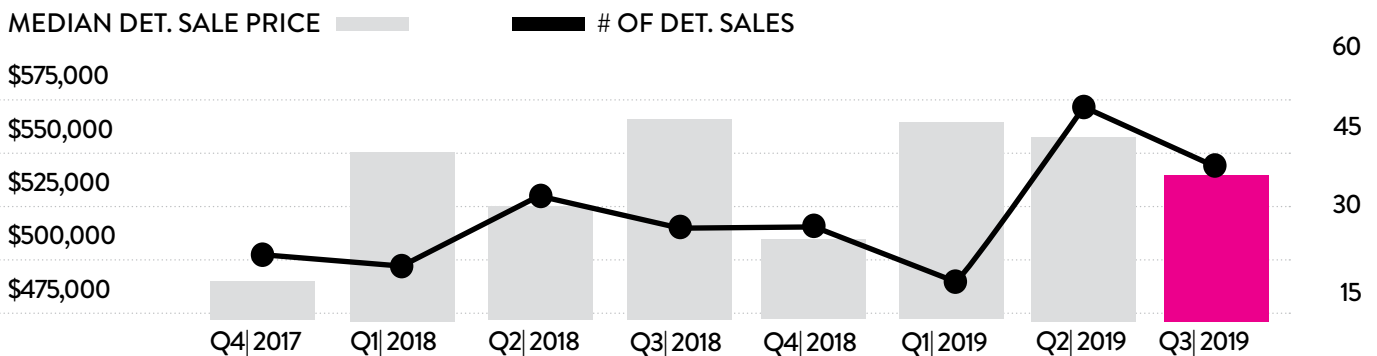
Q3 SALES BY INVENTORY TYPE



\$526,500
DETACHED MEDIAN SALE

\$469,000
TOWN/LINK MEDIAN SALE

\$348,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.



TW



TW 3 2019

COMPLETE DATA

Cities of Kitchener + Waterloo



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

Cities of Kitchener + Waterloo

Q3 | 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.

0.71

INSIDE THE NUMBERS

Look at you, all grown up now.

As predicted, the summer months continued to tell a similar story. The message of 2019 has been all about identifying your place in this new world of seemingly insatiable demand for homes. We use the word 'seemingly' because Buyers have commanded some control in many sub-markets across KW.

The condo market in Waterloo had some adjustments to make in recent Q's and Sellers, for the most part, listened to what their Realtor and the market was telling them. Now it is Downtown Kitchener's turn to do the same. The recent influx of new product into the urban marketplace has created a new world of supply that is still sorting itself out. Buyer demand is still strong, but Sellers must get their price right to play in the game.

With all lead indicators healthy, we see sales continuing with strength through a typically quieter Q4.

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

	Q3 2019	% Chg (Y)	Q3 2018	% Chg (Q)	Q2 2019
MEDIAN DET. SALE PRICE	\$562,000	7% ▲	\$525,000	2.3% ▼	\$575,000
NUMBER OF NEW SALES	1413	10% ▲	1284	20.1% ▼	1769
MEDIAN DAYS ON MARKET	14	1 day ▼	15	1 day ▲	13
NEW INVENTORY	1991	2.4% ▲	1945	23.4% ▼	2601

UP & DOWN quick review

▲53%

Y/Y increase in the Uptown sales to new listing ratio. As supply dropped, demand sure didn't.

▼4%

Y/Y reduction in the Downtown median sale price. Some room for concern in the urban condo market.

▲21%

Y/Y increase in the number of West Kitchener new inventory. The busiest 'hood in the Region stayed busy.

▼31%

Q/Q reduction in West Waterloo new inventory. The premium to be detached only increases.

▲11%

Y/Y increase in East Waterloo median sale price. More green arrows, and still the highest in town.

▼23%

Y/Y reduction in Uptown new inventory. You can't buy what isn't for sale, as the ratio spikes to record levels.

▲6%

Y/Y increase in the Downtown sales to new listing ratio. A slight spike, but still the lowest in town.

▼1%

Y/Y reduction in the number of East Kitchener new listings. Supply numbers continue to be static.

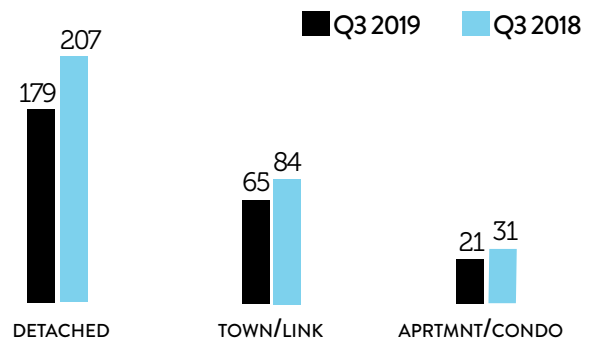
EAST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$500,000	265	357	0.74	\$495,000
Q3 2018 TOTAL	\$459,900	267	395	0.68	\$447,900
% CHANGE (+/-)	8.7% ▲	0.8% ▼	9.6% ▼	8.8% ▲	10.5% ▲
Q2 2019 TOTAL	\$499,450	334	470	0.71	\$477,722
% CHANGE (+/-)	0.11% ▲	20.6% ▼	24% ▼	4.2% ▲	3.6% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	259	251	▲
TOWN/LINK HOMES	61	86	▼
APARTMENT/CONDO	37	58	▼
TOTAL	357	395	▼
SALES TO NEW RATIO	0.74	0.68	▲

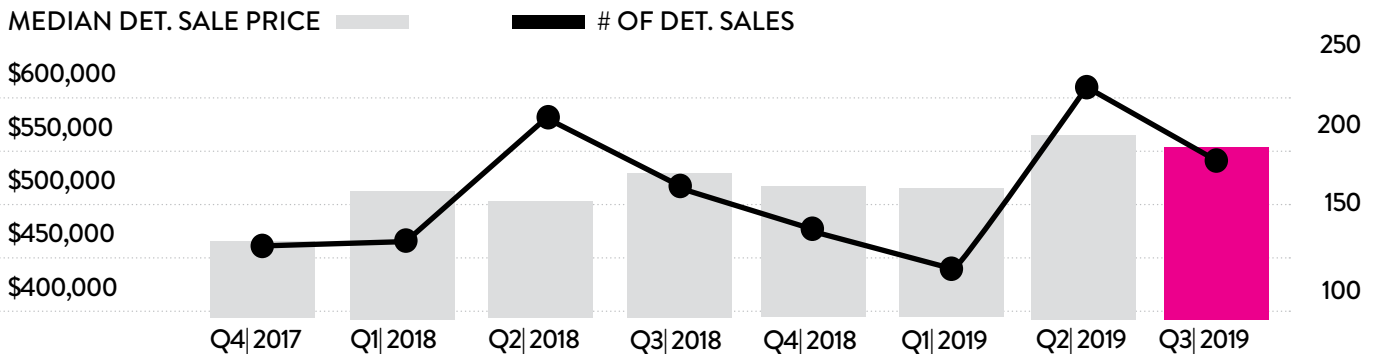
Q3 SALES BY INVENTORY TYPE



\$526,000
DETACHED MEDIAN SALE

\$449,590
TOWN/LINK MEDIAN SALE

\$260,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

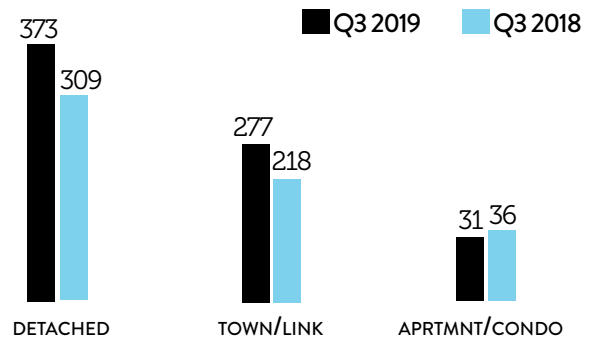
WEST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$499,900	681	958	0.71	\$475,000
Q3 2018 TOTAL	\$469,900	563	836	0.67	\$430,000
% CHANGE (+/-)	6.4% ▲	21% ▲	14.6% ▲	6% ▲	10.5% ▲
Q2 2019 TOTAL	\$499,900	798	1141	0.70	\$472,000
% CHANGE (+/-)	=	14.7% ▼	16% ▼	14% ▲	0.63% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	564	499	▲
TOWN/LINK HOMES	334	302	▲
APARTMENT/CONDO	60	35	▲
TOTAL	958	836	▲
SALES TO NEW RATIO	0.71	0.67	▲

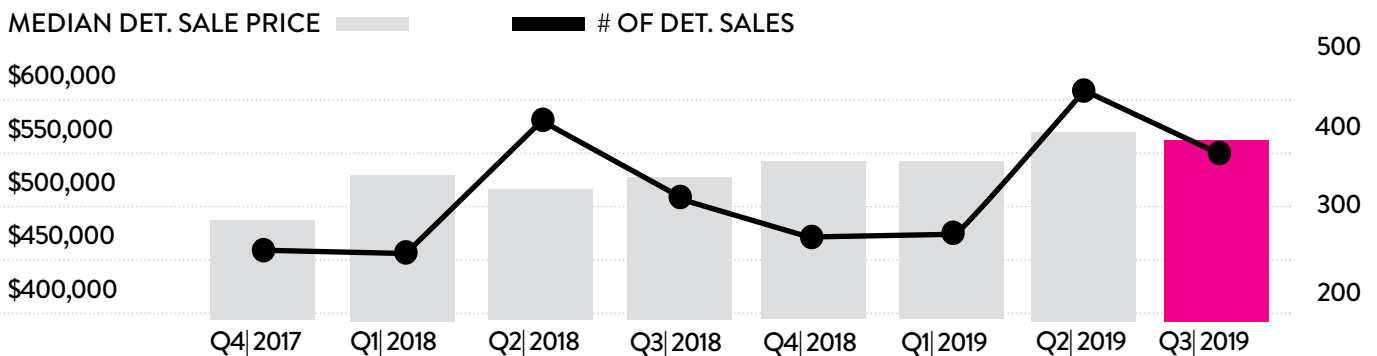
Q3 SALES BY INVENTORY TYPE



\$540,000
DETACHED MEDIAN SALE

\$420,000
TOWN/LINK MEDIAN SALE

\$295,500
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

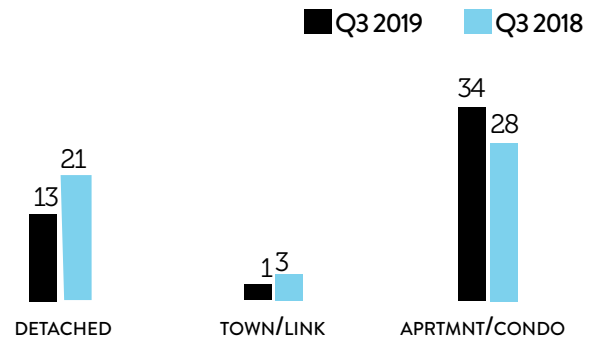
DOWNTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$380,000	48	88	0.54	\$352,750
Q3 2018 TOTAL	\$400,000	52	101	0.51	\$369,000
% CHANGE (+/-)	5% ▼	76% ▼	12.9% ▼	5.9% ▲	4.4% ▼
Q2 2019 TOTAL	\$399,900	61	111	0.55	\$408,000
% CHANGE (+/-)	4.9% ▼	21.3% ▼	21% ▼	1.8% ▼	13.5% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	21	41	▼
TOWN/LINK HOMES	3	9	▼
APARTMENT/CONDO	64	51	▲
TOTAL	88	101	▼
SALES TO NEW RATIO	0.54	0.51	▲

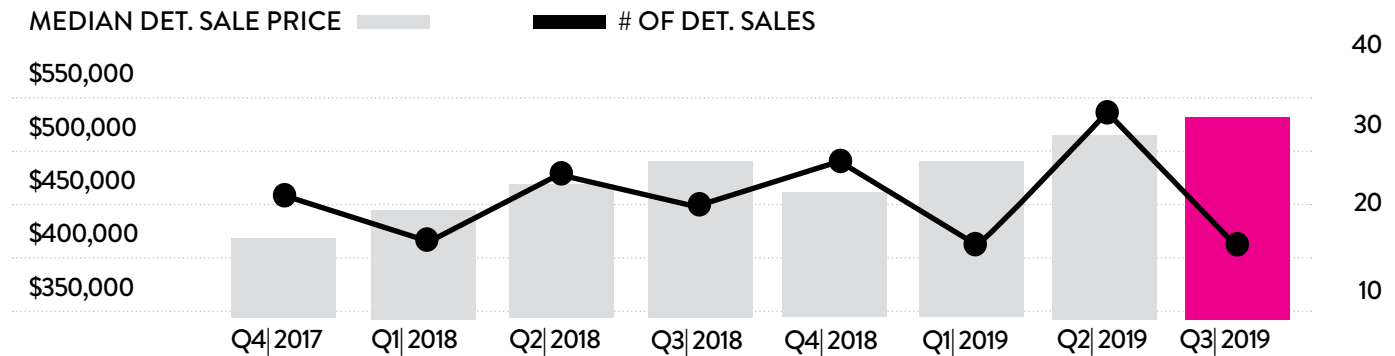
Q3 SALES BY INVENTORY TYPE



\$510,000
DETACHED MEDIAN SALE

\$852,025
TOWN/LINK MEDIAN SALE

\$346,750
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

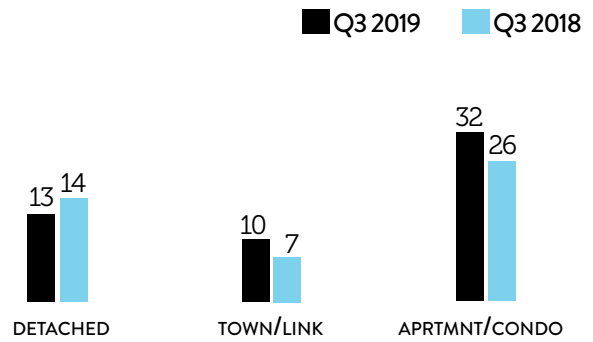
UPTOWN WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$524,900	55	62	0.89	\$453,000
Q3 2018 TOTAL	\$464,900	47	81	0.58	\$430,000
% CHANGE (+/-)	12.9% ▲	17% ▲	23.4% ▼	53.4% ▲	5.3% ▲
Q2 2019 TOTAL	\$480,000	67	107	0.63	\$470,000
% CHANGE (+/-)	9.3% ▲	17.9% ▼	42% ▼	41.3% ▲	3.6% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	23	28	▼
TOWN/LINK HOMES	11	12	▼
APARTMENT/CONDO	28	41	▼
TOTAL	62	81	▼
SALES TO NEW RATIO	0.89	0.58	▲

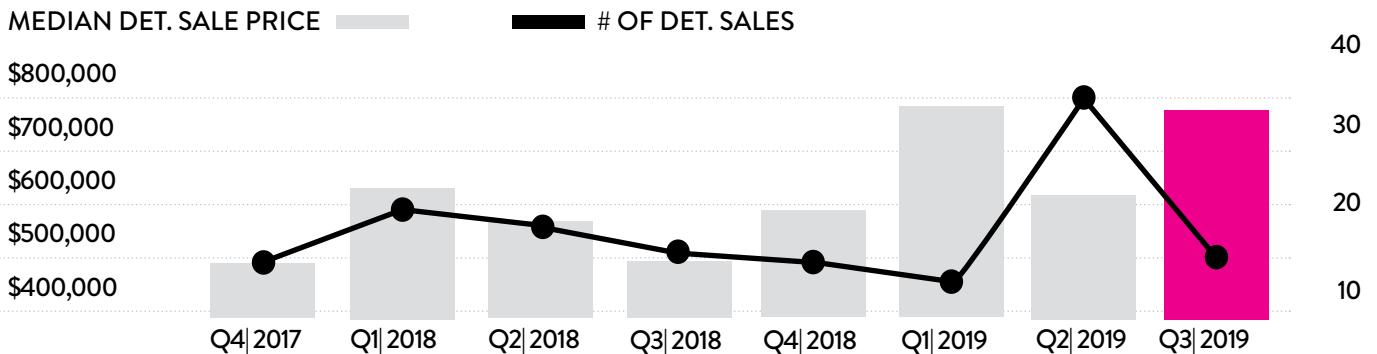
Q3 SALES BY INVENTORY TYPE



\$722,000
DETACHED MEDIAN SALE

\$423,250
TOWN/LINK MEDIAN SALE

\$423,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

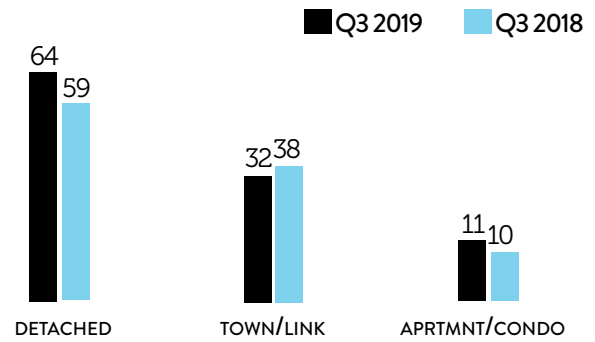
EAST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$599,900	107	161	0.66	\$530,000
Q3 2018 TOTAL	\$487,000	107	149	0.72	\$476,000
% CHANGE (+/-)	23.1% ▲	=	8% ▲	8.3% ▼	11.3% ▲
Q2 2019 TOTAL	\$524,888	172	239	0.72	\$550,150
% CHANGE (+/-)	14.3% ▲	37.8% ▼	32.6% ▼	8.3% ▼	3.7% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	111	89	▲
TOWN/LINK HOMES	35	46	▼
APARTMENT/CONDO	15	14	▲
TOTAL	161	149	▲
SALES TO NEW RATIO	0.66	0.72	▼

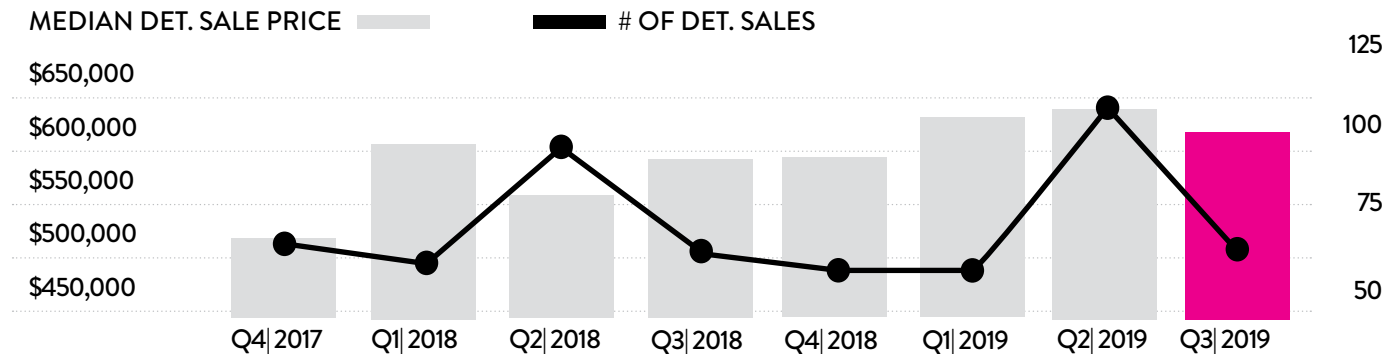
Q3 SALES BY INVENTORY TYPE



\$590,250
DETACHED MEDIAN SALE

\$457,250
TOWN/LINK MEDIAN SALE

\$350,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

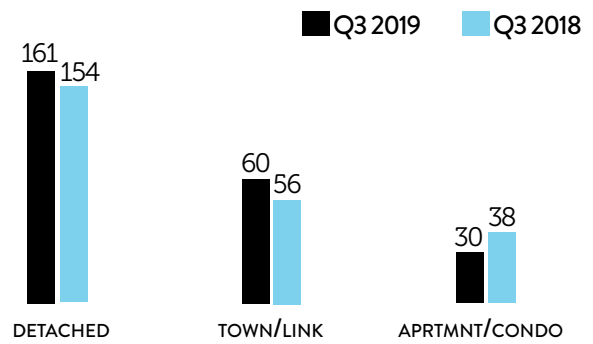
WEST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$599,900	251	354	0.71	\$560,000
Q3 2018 TOTAL	\$559,900	248	383	0.65	\$511,500
% CHANGE (+/-)	7.1% ▲	1.2% ▲	76% ▼	9.2% ▲	9.5% ▲
Q2 2019 TOTAL	\$575,000	321	510	0.63	\$568,000
% CHANGE (+/-)	4.3% ▲	21.8% ▼	30.6% ▼	12.7% ▲	1.4% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
DETACHED HOMES	230	259	▼
TOWN/LINK HOMES	70	75	▼
APARTMENT/CONDO	54	49	▲
TOTAL	354	383	▼
SALES TO NEW RATIO	0.71	0.65	▲

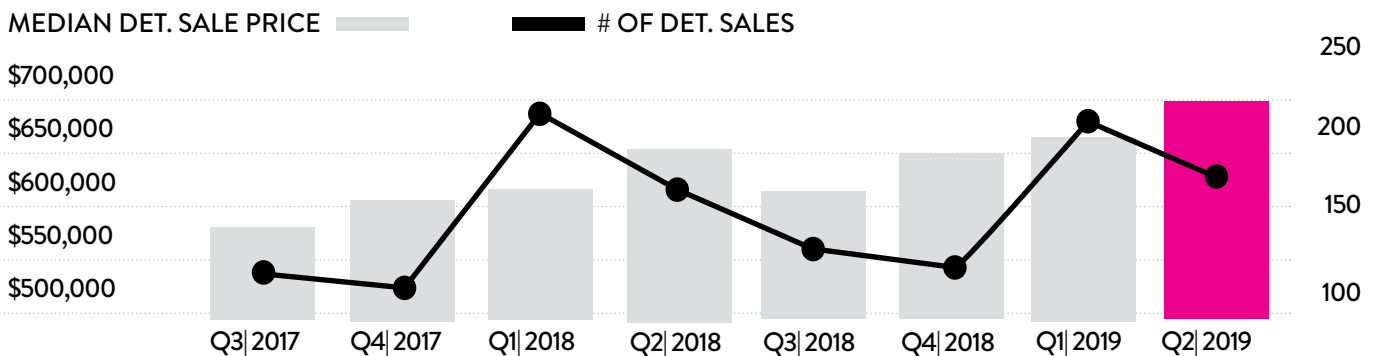
Q3 SALES BY INVENTORY TYPE



\$672,000
DETACHED MEDIAN SALE

\$443,000
TOWN/LINK MEDIAN SALE

\$300,000
APMNT/CONDO MEDIAN SALE



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.



TW

TW 3 2019

COMPLETE DATA

The Townships



ELORA
MILL
INN

TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

The Townships

INSIDE THE NUMBERS

Paying the price to leave the city.

While it is always difficult to paint each of the unique townships of the Region with the same brush, not so when it comes to the commonality of the massive price spikes across the entire canvas. Q3 saw new high-water marks for most of the Region's pastoral places as evidenced by a monstrous 17.7% Y/Y increase in median sale price.

While rolling country properties and quaint rural villages always show their very best in the dry summer months, the question remains - will prices continue to rise in the near future? With the upcoming availability of larger lots in a measured new home supply and ever-increasing demand to leave urban areas, we're going with a resounding 'yes'.

With a typically slower season on the horizon, this might be the time to pack up the wagon and head on out to the countryside.

Q3 | 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.

0.62

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

	Q3 2019	% Chg (Y)	Q3 2018	% Chg (Q)	Q2 2019
MEDIAN DET. SALE PRICE	\$654,800	17.7% ▲	\$556,500	5.6% ▲	\$620,000
NUMBER OF NEW SALES	425	7% ▲	397	17.6% ▼	516
MEDIAN DAYS ON MARKET	23	3 days ▲	20	8 days ▲	15
NEW INVENTORY	685	4.4% ▲	656	22.7% ▼	886

UP & DOWN quick review

- ▲ 20% Y/Y increase in the Puslinch median sale price. The highest in the Region reached even higher.
- ▲ 12% Y/Y jump in the the Wellesley median sale price. Is that gigantic 700k threshold on the horizon?
- ▲ 8% Q/Q increase in the Guelph Eramosa median list price. Seller confidence has been firmly rekindled.
- ▲ 27% Y/Y increase in the Wilmot sales to new listing ratio. Where always hot appears to be the new norm.
- ▼ 0% Q/Q adjustment in the Centre Wellington median list price. We may have found a ceiling for awhile.
- ▼ 7% Q/Q decrease in the North Dumfries median sale price. An anomaly we don't see sticking around.
- ▼ 14% Y/Y decrease in Wilmot new inventory. The number of sales grew, so you guessed it, prices did as well.
- ▼ 14% Y/Y decrease in the Woolwich sales to new listing ratio. Back to more familiar demand levels in Q3.

All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

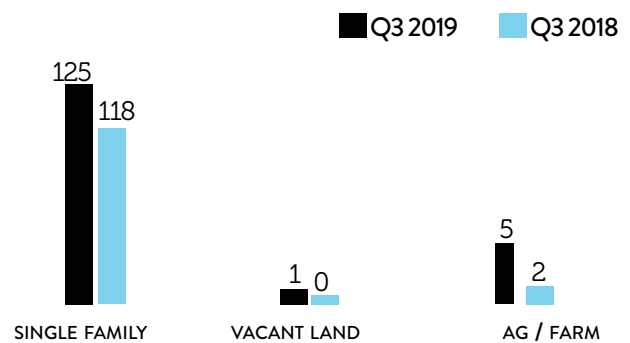
CENTRE WELLINGTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$599,000	131	198	0.66	\$555,000
Q3 2018 TOTAL	\$549,900	120	172	0.70	\$510,000
% CHANGE (+/-)	8.9% ▲	9.2% ▲	15.1% ▲	5.7% ▼	8.8% ▲
Q2 2019 TOTAL	\$599,000	151	216	0.70	\$535,000
% CHANGE (+/-)	=	13.2% ▼	8.3% ▼	5.7% ▼	3.7% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	187	170	▲
VACANT LAND	6	1	▲
AG / FARM	5	1	▲
TOTAL	198	172	▲
SALES TO NEW RATIO	0.66	0.70	▼

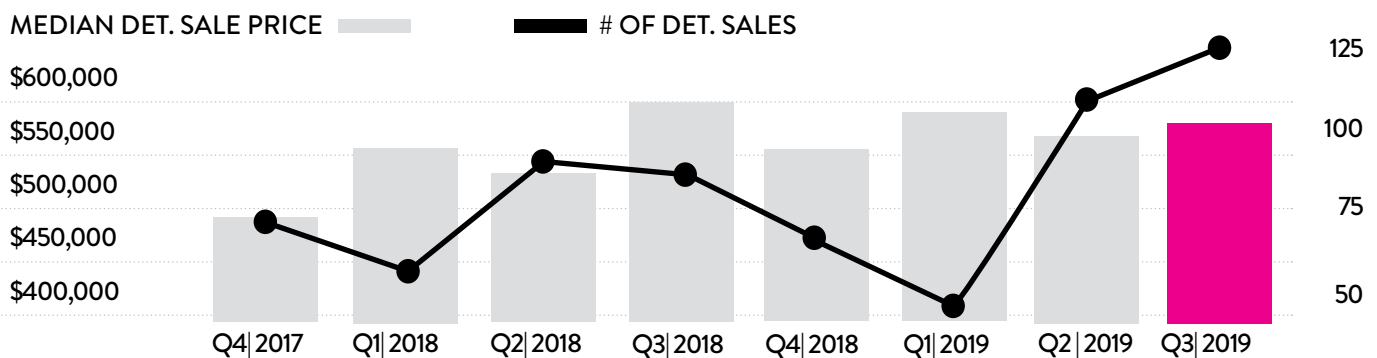
Q3 SALES BY INVENTORY TYPE



\$552,000
SINGLE FAMILY MEDIAN

\$430,000
VACANT LAND MEDIAN

\$1,200,000
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

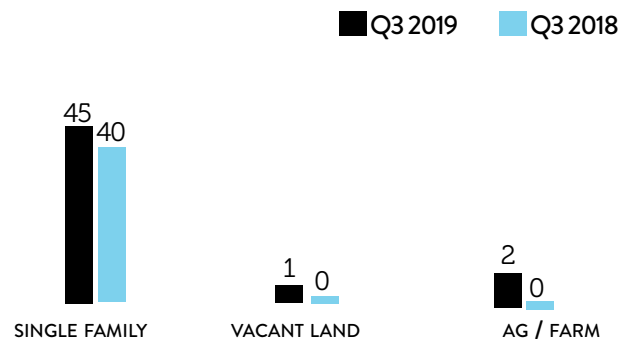
GUELPH ERAMOSA

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$809,950	48	90	0.53	\$738,950
Q3 2018 TOTAL	\$776,950	40	66	0.61	\$730,550
% CHANGE (+/-)	4.2% ▲	20% ▲	36.4% ▲	13.1% ▼	1.1% ▲
Q2 2019 TOTAL	\$749,900	52	108	0.48	\$715,000
% CHANGE (+/-)	8% ▲	7.7% ▼	16.7% ▼	10.4% ▲	3.3% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	83	57	▲
VACANT LAND	2	2	=
AG / FARM	5	7	▼
TOTAL	90	66	▲
SALES TO NEW RATIO	0.53	0.61	▼

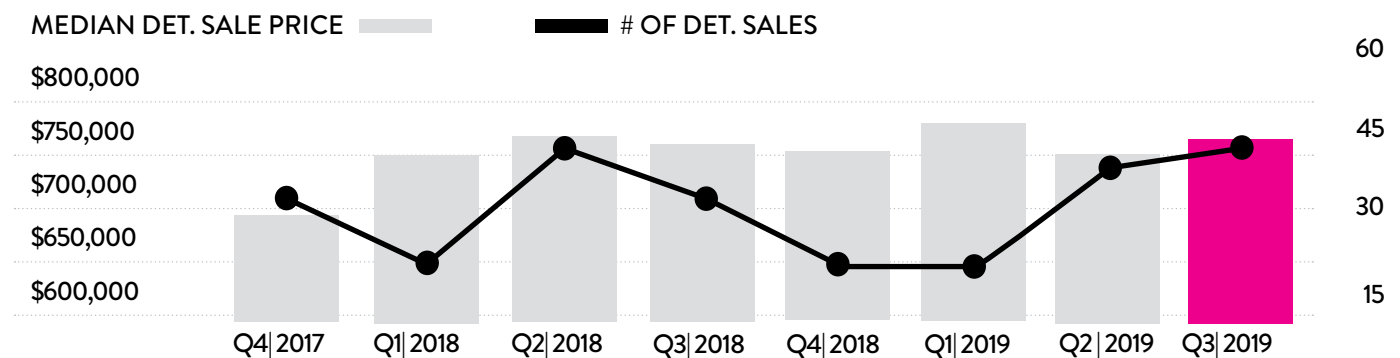
Q3 SALES BY INVENTORY TYPE



\$737,900
SINGLE FAMILY MEDIAN

\$450,000
VACANT LAND MEDIAN

\$987,500
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

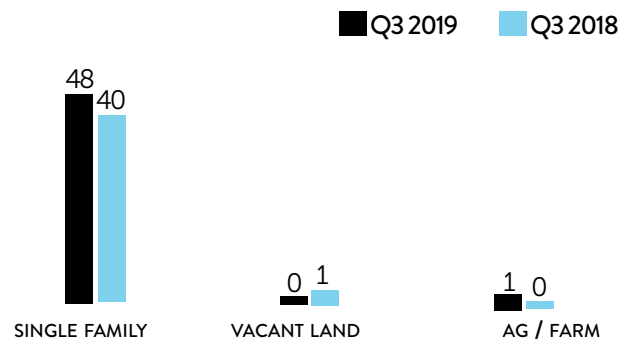
NORTH DUMFRIES

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$649,900	49	66	0.74	\$550,000
Q3 2018 TOTAL	\$549,900	41	74	0.55	\$568,100
% CHANGE (+/-)	18.2% ▲	19.5% ▲	10.8% ▼	34.5% ▲	3.2% ▼
Q2 2019 TOTAL	\$569,900	52	123	0.42	\$590,000
% CHANGE (+/-)	14% ▲	5.8% ▼	46.3% ▼	76.2% ▲	6.8% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	59	70	▼
VACANT LAND	5	3	▲
AG / FARM	2	1	▲
TOTAL	66	74	▼
SALES TO NEW RATIO	0.74	0.55	▲

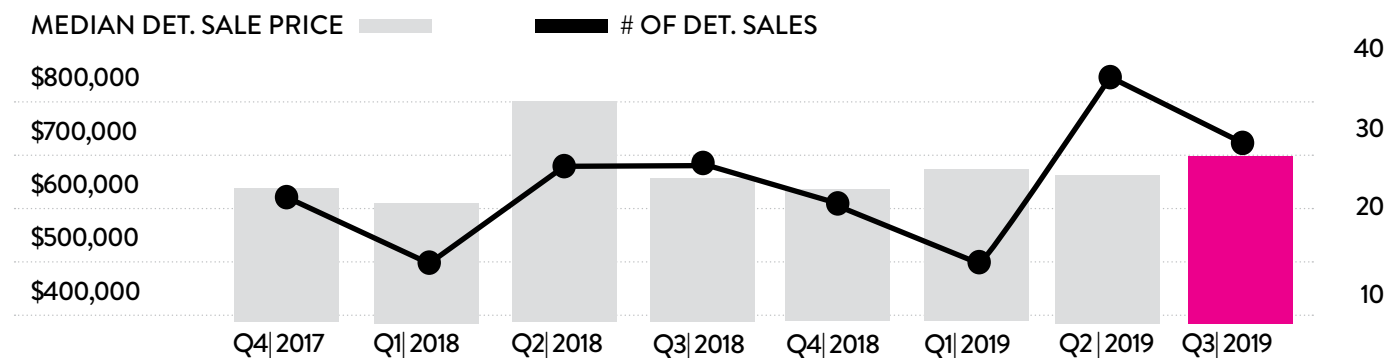
Q3 SALES BY INVENTORY TYPE



\$537,500
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$825,000
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

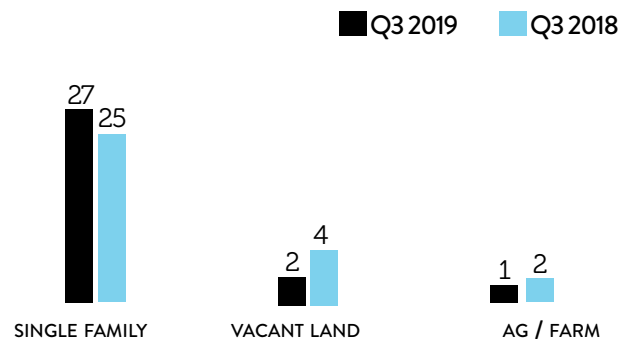
TOWNSHIP OF PUSLINCH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$1,174,950	30	72	0.42	\$950,000
Q3 2018 TOTAL	\$783,250	31	66	0.47	\$790,000
% CHANGE (+/-)	50% ▲	3.2% ▼	9.1% ▲	10.6% ▼	20.2% ▲
Q2 2019 TOTAL	\$1,124,500	38	94	0.40	\$920,000
% CHANGE (+/-)	4.5% ▲	21% ▼	23.4% ▼	5% ▲	3.3% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	63	52	▲
VACANT LAND	3	12	▼
AG / FARM	6	2	▲
TOTAL	72	66	▲
SALES TO NEW RATIO	0.42	0.47	▼

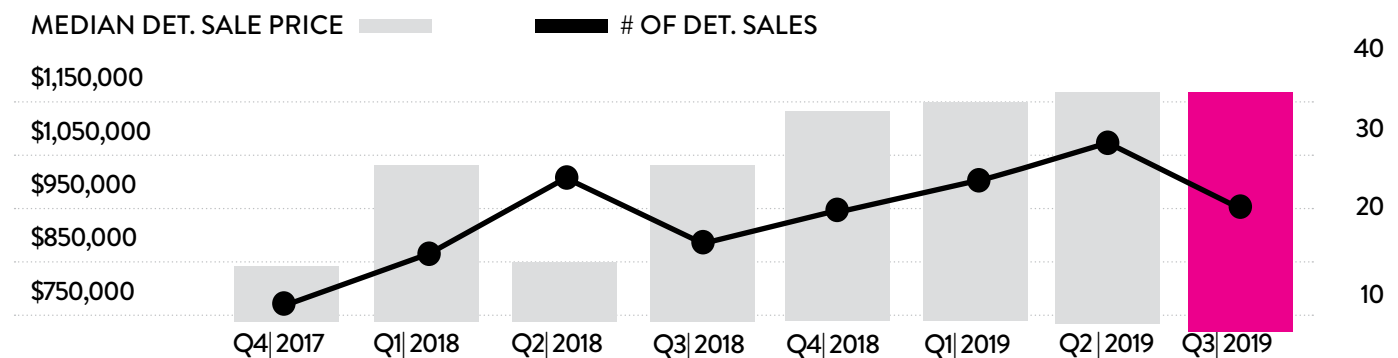
Q3 SALES BY INVENTORY TYPE



\$950,000
SINGLE FAMILY MEDIAN

\$590,500
VACANT LAND MEDIAN

\$1,430,000
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

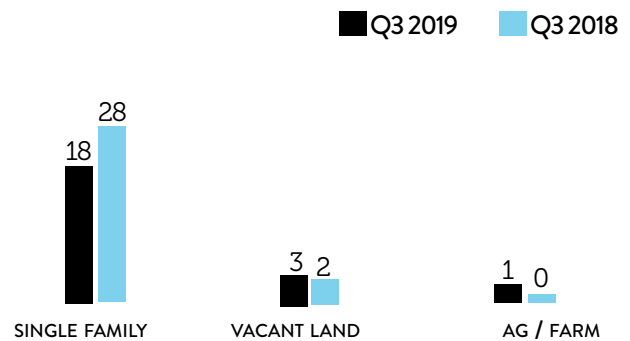
TOWNSHIP OF WELLESLEY

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$685,000	22	41	0.54	\$683,500
Q3 2018 TOTAL	\$679,900	14	41	0.34	\$610,000
% CHANGE (+/-)	0.75% ▲	57.1% ▲	=	58.8% ▲	12% ▲
Q2 2019 TOTAL	\$679,900	18	41	0.44	\$627,500
% CHANGE (+/-)	0.75% ▲	22.2% ▲	=	22.7% ▲	8.9% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	36	41	▼
VACANT LAND	5	0	▲
AG / FARM	0	0	=
TOTAL	41	41	=
SALES TO NEW RATIO	0.54	0.34	▲

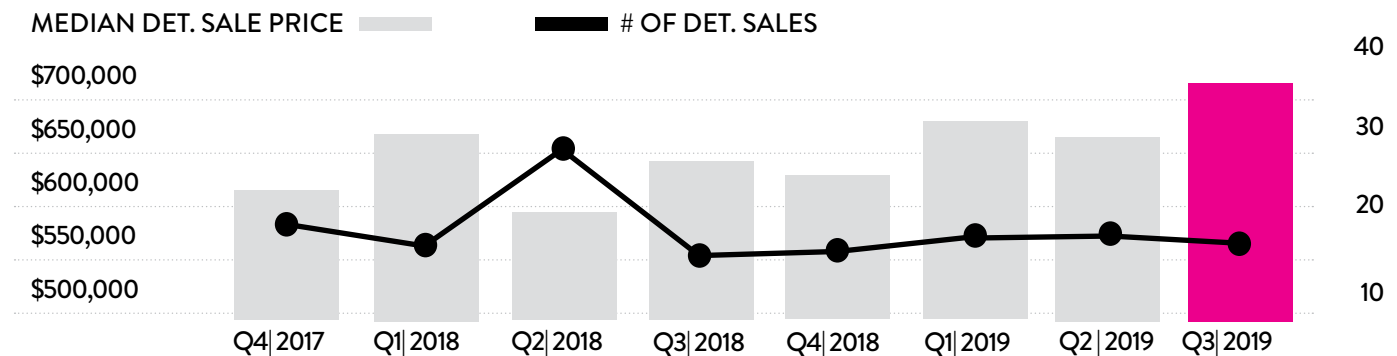
Q3 SALES BY INVENTORY TYPE



\$683,500
SINGLE FAMILY MEDIAN

\$261,500
VACANT LAND MEDIAN

\$1,600,000
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

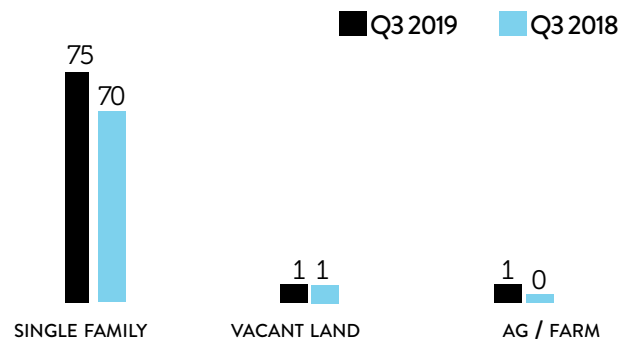
TOWNSHIP OF WILMOT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$648,250	77	110	0.70	\$598,000
Q3 2018 TOTAL	\$629,900	71	128	0.55	\$540,000
% CHANGE (+/-)	2.9% ▲	8.4% ▲	14.1% ▼	27.3% ▲	10.7% ▲
Q2 2019 TOTAL	\$599,900	128	181	0.71	\$546,000
% CHANGE (+/-)	8% ▲	40% ▼	39.2% ▼	14% ▼	9.5% ▲

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	101	121	▼
VACANT LAND	6	3	▲
AG / FARM	3	4	▼
TOTAL	110	128	▼
SALES TO NEW RATIO	0.70	0.55	▲

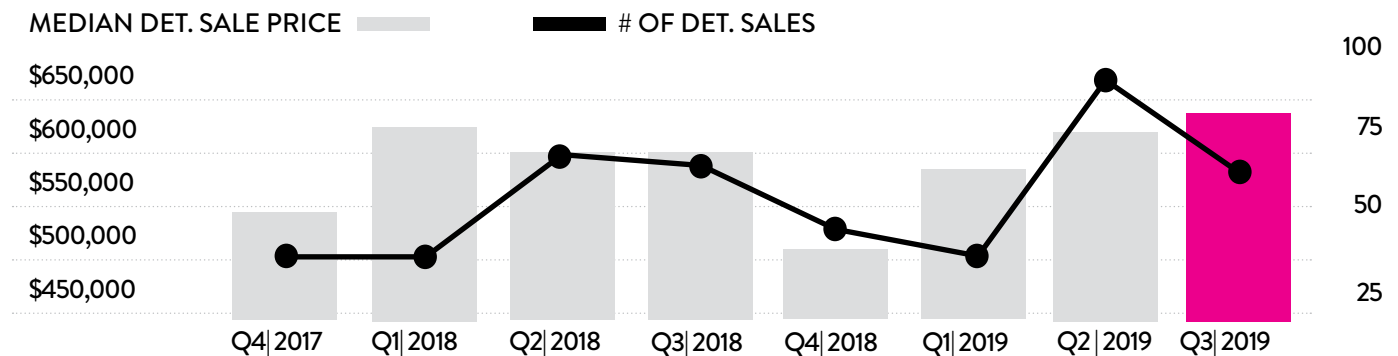
Q3 SALES BY INVENTORY TYPE



\$595,000
SINGLE FAMILY MEDIAN

\$1,100,000
VACANT LAND MEDIAN

\$1,230,000
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

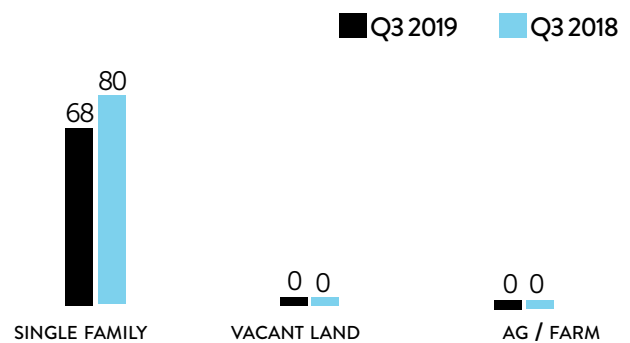
TOWNSHIP OF WOOLWICH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q3 2019 TOTAL	\$699,000	68	108	0.63	\$525,000
Q3 2018 TOTAL	\$554,900	80	109	0.73	\$505,000
% CHANGE (+/-)	26% ▲	15% ▼	0.9% ▼	13.7% ▼	3.9% ▲
Q2 2019 TOTAL	\$560,000	76	119	0.64	\$541,500
% CHANGE (+/-)	25% ▲	10.5% ▼	9.2% ▼	1.6% ▼	3% ▼

Q3 NEW INVENTORY

	Q3 2019	Q3 2018	TREND
SINGLE FAMILY	105	104	▲
VACANT LAND	0	5	▼
AG / FARM	3	0	▲
TOTAL	108	109	▼
SALES TO NEW RATIO	0.63	0.73	▼

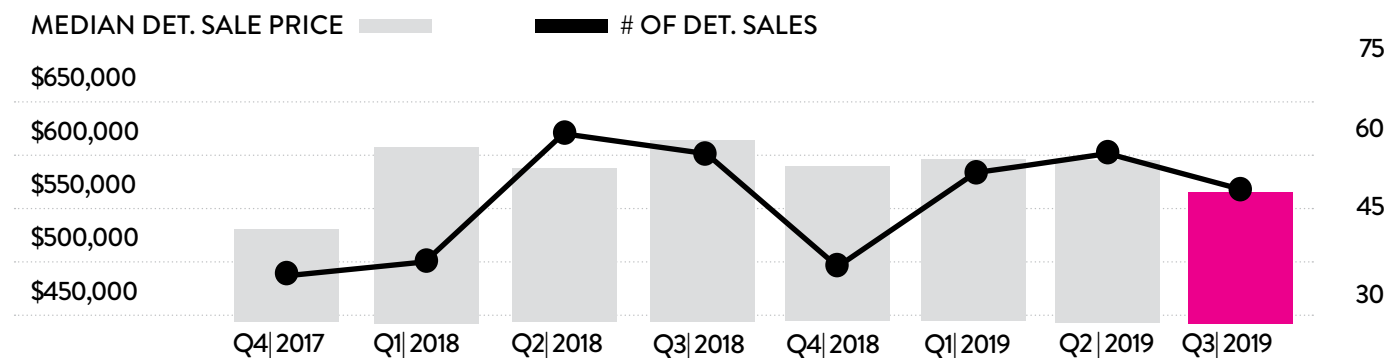
Q3 SALES BY INVENTORY TYPE



\$525,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



All material presented herein is intended for information purposes only. While this information is believed to be correct it is represented subject to errors, omissions, changes, or withdrawal without notice.

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

