

TW Q2
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Leading REAL ESTATE COMPANIES OF THE WORLD™
TRILLIUMWEST
REAL ESTATE BROKERAGE

QUARTERLY
DATA REPORT

THE Q2 COVID-19 DISCLAIMER



What a time.

Our last report was released amid a time of completely uncharted territory. It had a much more calculated and even somber introduction. It felt right for the moment.

But not this time! Let's have some fun with this one.

The actual data is all here for you as always from across the Region, but we added some amusing little wrinkles in this time. We have hidden a few fun Easter eggs in this report. Each City and the Townships have a musical theme to them to that you need to identify in the writeup for each section. Once you have all 4 legendary bands/musicians identified, DM us your answers on [Instagram](#) and if you are correct you will be entered to win a series of big money gift cards from independent restaurants from across the Region.

Consume the entire report, get yourself the Region's REAL real estate information and win some good times at our favourite local eateries. #winning

A little fun felt right for the moment this time around, friends. So enjoy!

Stay safe, stay informed & stay in touch!

XOXO



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COMPLETE DATA

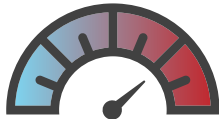
Cambridge

COMPLETE DATA

City of Cambridge

Q2 | SALES TO
new listing ratio

Between 0.4 and 0.6
is considered a balanced market



0.75

INSIDE THE NUMBERS

Hang it up and see what tomorrow brings.

Going into Q2, we had big concerns about how well the Cambridge market would survive a full COVID-quarter. Were the recent big gains in both activity and sale prices still too fresh to stand up against some market hardship? Surely prices will head South a little, right? Or, we pondered if there was enough strength in a now Regional market to help keep all of our collective heads above water?

The answer? Yes to it all, just depends what week we were looking at.

We saw hot minutes at the start of Q2 that witnessed staggering drops in inventory, sales and even price gaps opened up again. Then that cleared up. Then it came back. Then it cleared up again. It was a turbulent ride through Q2 in Cambridge, but things just kept truckin’.

Q2 in Cambridge, what a long strange trip it’s been ...

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

	Q2 2020	% Chg (Y)	Q2 2019	% Chg (Q)	Q1 2020
MEDIAN DET. SALE PRICE	\$593,000	14% ▲	\$520,000	0.5% ▲	\$590,000
NUMBER OF NEW SALES	530	20.3% ▼	665	23.2% ▲	430
MEDIAN DAYS ON MARKET	12	1 day ▼	13	3 days ▲	9
NEW INVENTORY	705	27.5% ▼	972	20.5% ▲	585

UP & DOWN
quick review

- ▲16% Y/Y increase in the East Galt median sale price. Throwing down the biggest gains in town.
- ▼6% Q/Q drop in North Galt median sale price. Expected volatility for the most expensive area in town.
- ▲58% Q/Q increase in Hespeler new inventory. A curious jump while most other areas saw big declines.
- ▼13% Y/Y reduction in Hespeler new inventory. Normally a big story, but this is the lowest figure in the city.
- ▲11% Y/Y jump in the Preston median list price. That elusive 500k mark has now been well surpassed.
- ▼52% Y/Y decrease in North Galt new inventory. Buyers just can’t buy what isn’t for sale.
- ▲11% Y/Y increase in the East Galt median list price. Still tucked under 500k, but for how much longer?
- ▼14% Gap between the West Galt median list & sale prices. Buyers aren’t following hopeful Sellers to the bank.

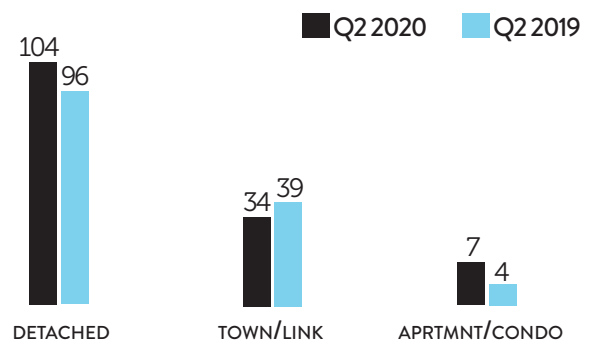
HESPELER CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$569,900	145	202	0.71	\$589,900
Q2 2019 TOTAL	\$529,950	139	231	0.60	\$519,900
% CHANGE (+/-)	75% ▲	4.3% ▲	12.5% ▼	18.3% ▲	13.5% ▲
Q1 2020 TOTAL	\$586,950	85	128	0.66	\$590,000
% CHANGE (+/-)	2.9% ▼	70.6% ▲	57.8% ▲	7.6% ▲	0.01% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	121	168	▼
TOWN/LINK HOMES	75	57	▲
APARTMENT/CONDO	6	6	=
TOTAL	202	231	▼
SALES TO NEW RATIO	0.71	0.60	▲

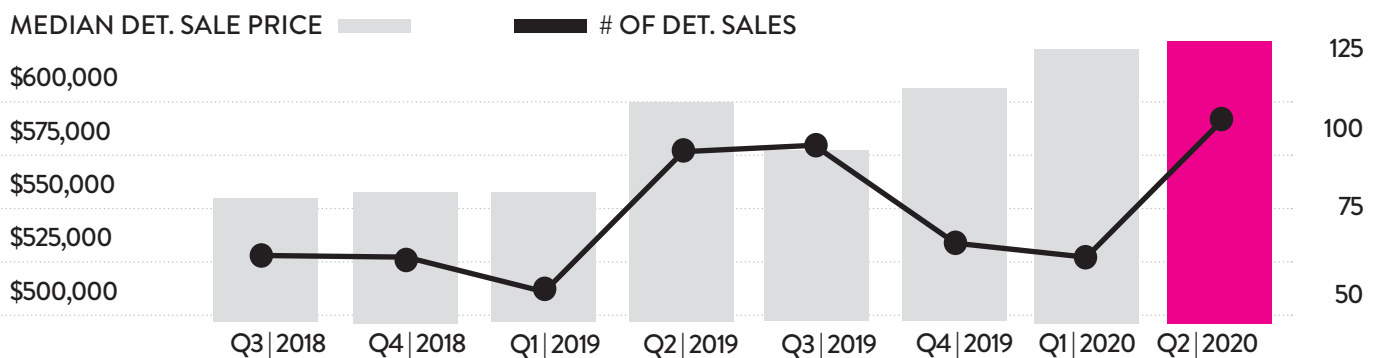
Q2 SALES BY INVENTORY TYPE



\$640,000
DETACHED MEDIAN SALE

\$515,000
TOWN/LINK MEDIAN SALE

\$322,500
APMNT/CONDO MEDIAN SALE



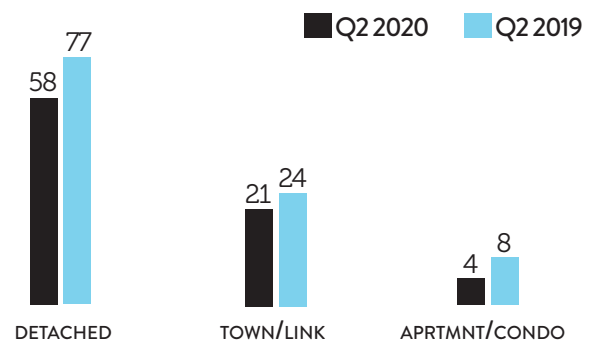
PRESTON CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$527,450	83	110	0.75	\$491,250
Q2 2019 TOTAL	\$477,500	109	156	0.70	\$445,000
% CHANGE (+/-)	10.5% ▲	23.8% ▼	29.5% ▼	5% ▲	10.4% ▲
Q1 2020 TOTAL	\$499,900	96	124	0.77	\$492,850
% CHANGE (+/-)	5.5% ▲	13.5% ▼	6.7% ▼	2% ▼	0.32% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	72	115	▼
TOWN/LINK HOMES	32	34	▼
APARTMENT/CONDO	6	7	▼
TOTAL	110	156	▼
SALES TO NEW RATIO	0.75	0.70	▲

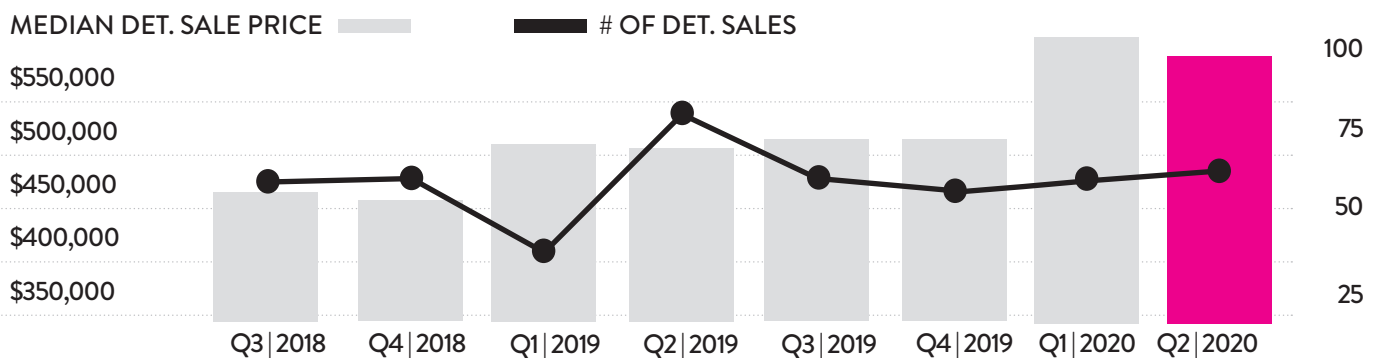
Q2 SALES BY INVENTORY TYPE



\$554,500
DETACHED MEDIAN SALE

\$449,900
TOWN/LINK MEDIAN SALE

\$305,555
APMNT/CONDO MEDIAN SALE



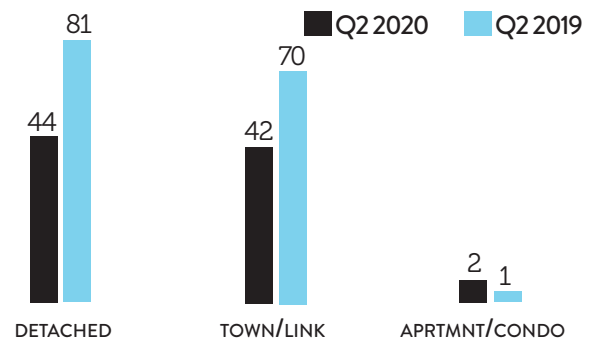
NORTH GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$539,900	88	94	0.94	\$519,000
Q2 2019 TOTAL	\$479,900	152	197	0.77	\$465,500
% CHANGE (+/-)	12.5% ▲	42.1% ▼	52.3% ▼	22.1% ▲	11.5% ▲
Q1 2020 TOTAL	\$549,900	69	104	0.66	\$550,500
% CHANGE (+/-)	1.8% ▼	27.5% ▲	9.6% ▼	42.4% ▲	5.7% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	48	125	▼
TOWN/LINK HOMES	45	71	▼
APARTMENT/CONDO	1	1	=
TOTAL	94	197	▼
SALES TO NEW RATIO	0.94	0.77	▲

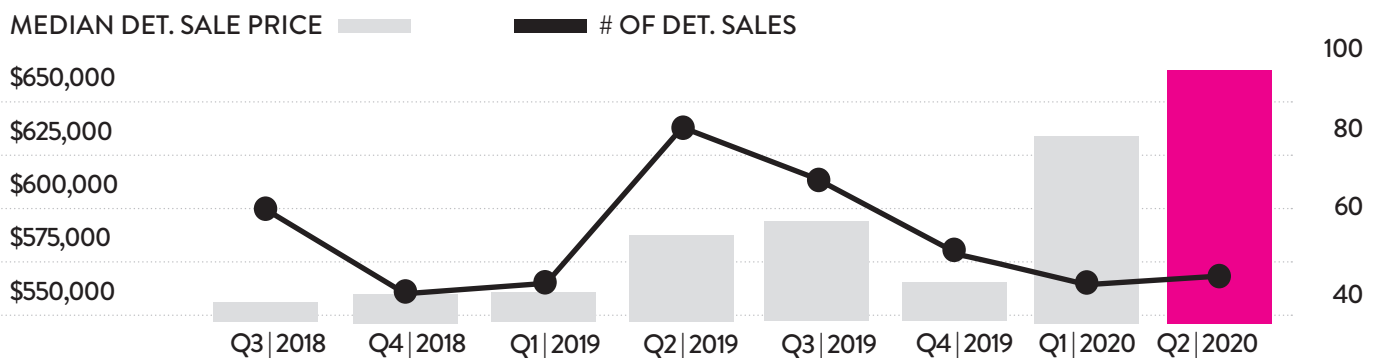
Q2 SALES BY INVENTORY TYPE



\$660,250
DETACHED MEDIAN SALE

\$430,000
TOWN/LINK MEDIAN SALE

\$386,750
APMNT/CONDO MEDIAN SALE



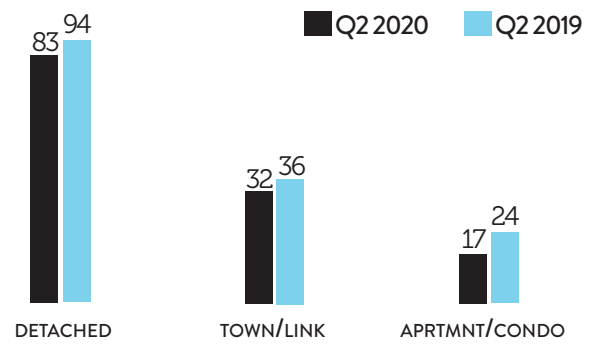
EAST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$499,900	132	161	0.82	\$499,950
Q2 2019 TOTAL	\$449,900	154	233	0.66	\$432,500
% CHANGE (+/-)	11.1% ▲	14.3% ▼	30.9% ▼	24.2% ▲	15.6% ▲
Q1 2020 TOTAL	\$472,450	114	142	0.79	\$492,500
% CHANGE (+/-)	5.8% ▲	15.8% ▲	13.4% ▲	3.8% ▲	1.5% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	106	166	▼
TOWN/LINK HOMES	38	44	▼
APARTMENT/CONDO	17	23	▼
TOTAL	161	233	▼
SALES TO NEW RATIO	0.82	0.66	▲

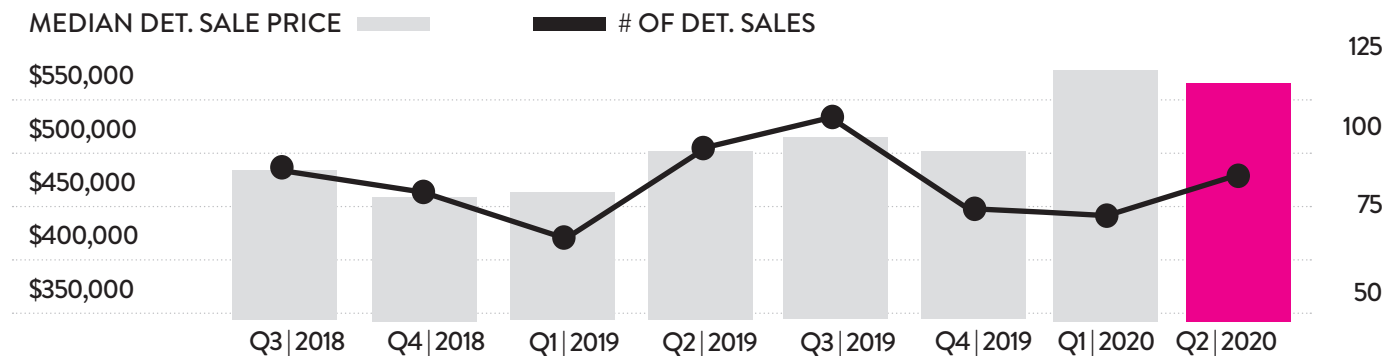
Q2 SALES BY INVENTORY TYPE



\$539,900
DETACHED MEDIAN SALE

\$468,500
TOWN/LINK MEDIAN SALE

\$335,000
APMNT/CONDO MEDIAN SALE



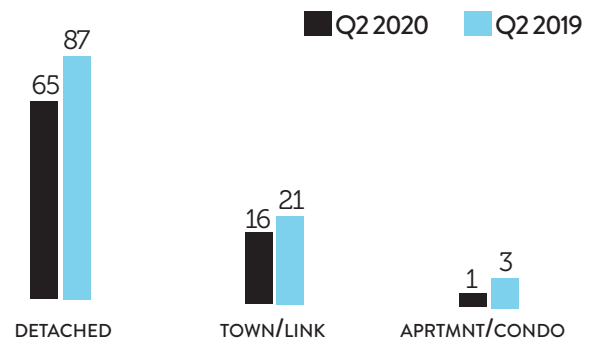
WEST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$599,900	82	111	0.74	\$525,000
Q2 2019 TOTAL	\$524,900	111	155	0.72	\$480,000
% CHANGE (+/-)	14.3% ▲	26.1% ▼	28.4% ▼	2.8% ▲	9.4% ▲
Q1 2020 TOTAL	\$500,000	66	87	0.76	\$534,900
% CHANGE (+/-)	14.3% ▲	24.2% ▲	27.6% ▲	2.6% ▼	1.8% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	82	128	▼
TOWN/LINK HOMES	27	23	▼
APARTMENT/CONDO	2	4	▼
TOTAL	111	155	▼
SALES TO NEW RATIO	0.74	0.72	▲

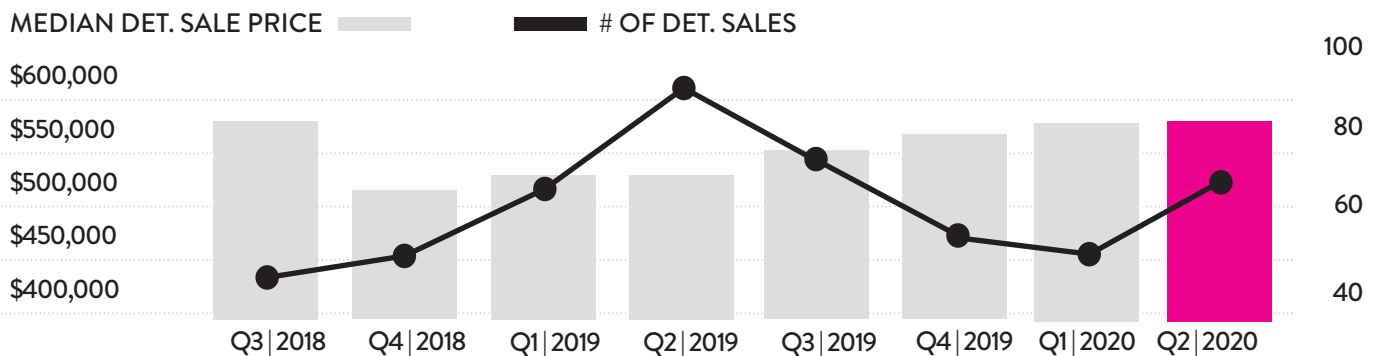
Q2 SALES BY INVENTORY TYPE



\$556,250
DETACHED MEDIAN SALE

\$442,800
TOWN/LINK MEDIAN SALE

\$361,000
APMNT/CONDO MEDIAN SALE



TW Q2

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COMPLETE DATA

Guelph

COMPLETE DATA

City of Guelph

INSIDE THE NUMBERS

If there's a bustle in your hedgerow, don't be alarmed now.

Guelph historically has a slow start to any year and Q2 is when the action really gets going. As we came out from the land of the ice and snow, there was real concern as to whether the market would remain frozen in time or if the real estate levee would once again break.

With week after week of improving data, the final Q2 results shouldn't really be surprising to those who have been following the Guelph market for many years. Supply continues to be the issue in the market, not demand. Even a global pandemic couldn't seem to change how everything that glitters in Guelph still turns to gold.

The steady stream of GTA buyers continued hard in Q2 and reached peak levels towards the end of the Q.

Guess there is still a feeling they get when they look to the West ...

Q2 | SALES TO new listing ratio

Between 0.4 and 0.6 is considered a balanced market



0.74

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

	Q2 2020	% Chg (Y)	Q2 2019	% Chg (Q)	Q1 2020
MEDIAN DET. SALE PRICE	\$645,000	84% ▲	\$595,000	1.1%	\$638,000
NUMBER OF NEW SALES	486	31.7% ▼	712	15.5% ▼	575
MEDIAN DAYS ON MARKET	13	2 days ▼	15	3 days ▲	10
NEW INVENTORY	660	37.7% ▼	1060	8.7% ▼	723

UP & DOWN quick review

- ▲23% Y/Y increase in North Guelph townhome median sale price. The biggest jump in the city. By far.
- ▲18% Q/Q increase in South Guelph median sale price. The demand to be detached is pushing prices higher.
- ▲12% Y/Y increase in Midtown detached median sale price. This figure is primed to continue that big rise.
- ▲7% Q/Q increase in West Guelph median sale price. The West-side story begins to re-write itself.
- ▼5% Q/Q reduction in Downtown median sale price. COVID-effect felt a little more in the core.
- ▼49% Y/Y reduction in Midtown new inventory. People staying put means prices have to do the moving.
- ▼4% Q/Q drop in East Guelph median sale price. A curious occurrence, or the the start of a new trend?
- ▼33% Y/Y reduction in Downtown sales volume. This downward trend is likely not to stick around long.

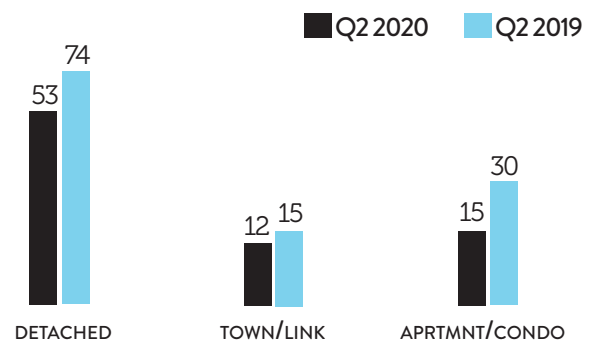
DOWNTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$584,900	80	120	0.67	\$541,075
Q2 2019 TOTAL	\$549,900	119	185	0.64	\$520,000
% CHANGE (+/-)	6.4% ▲	32.8% ▼	35.1% ▼	4.7% ▲	4% ▲
Q1 2020 TOTAL	\$557,450	87	120	0.72	\$571,000
% CHANGE (+/-)	4.9% ▲	8% ▼	=	6.9% ▼	5.2% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	68	127	▲
TOWN/LINK HOMES	20	19	▲
APARTMENT/CONDO	32	39	▼
TOTAL	120	185	▼
SALES TO NEW RATIO	0.74	0.64	▲

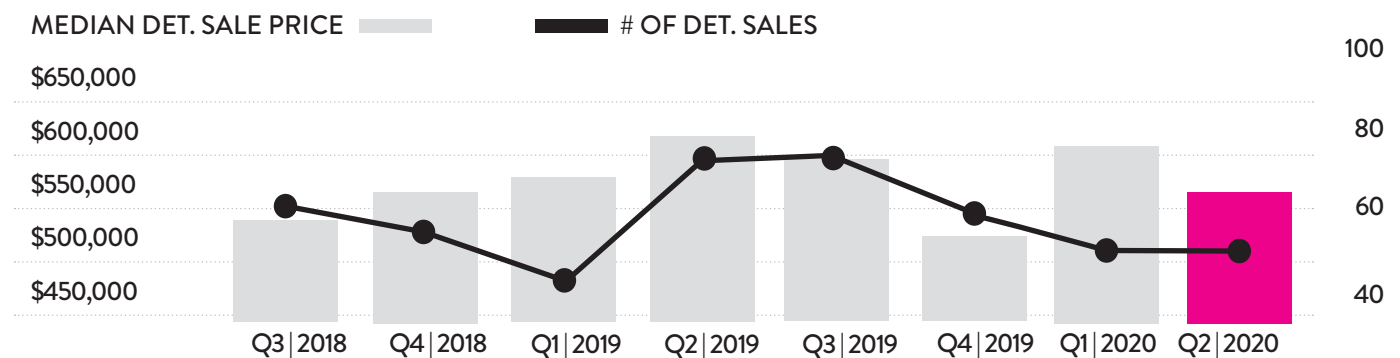
Q2 SALES BY INVENTORY TYPE



\$545,000
DETACHED MEDIAN SALE

\$534,950
TOWN/LINK MEDIAN SALE

\$415,000
APMNT/CONDO MEDIAN SALE



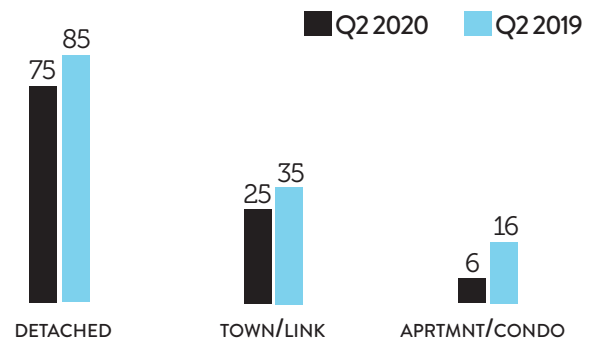
MIDTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$644,900	106	137	0.77	\$633,750
Q2 2019 TOTAL	\$619,900	136	228	0.60	\$577,000
% CHANGE (+/-)	4% ▲	22% ▼	40% ▼	28.3% ▲	9.8% ▲
Q1 2020 TOTAL	\$639,900	140	171	0.82	\$622,450
% CHANGE (+/-)	0.78% ▲	24.3% ▼	19.9% ▼	6.1% ▼	1.8% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	86	147	▼
TOWN/LINK HOMES	40	64	▼
APARTMENT/CONDO	11	17	▼
TOTAL	137	228	▼
SALES TO NEW RATIO	0.77	0.68	▲

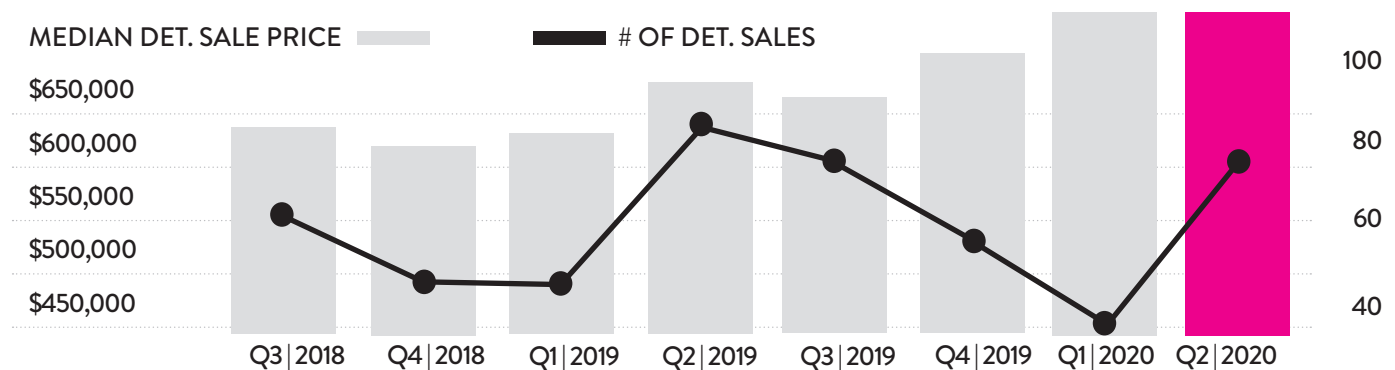
Q2 SALES BY INVENTORY TYPE



\$726,500
DETACHED MEDIAN SALE

\$485,000
TOWN/LINK MEDIAN SALE

\$410,000
APMNT/CONDO MEDIAN SALE



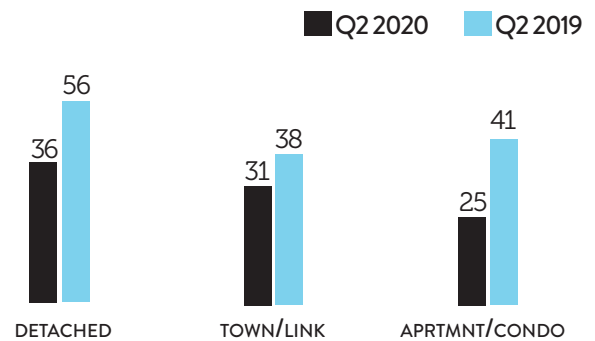
SOUTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$599,888	92	137	0.67	\$583,500
Q2 2019 TOTAL	\$550,000	135	212	0.64	\$535,000
% CHANGE (+/-)	9.1% ▲	31.8% ▼	35.4% ▼	4.7% ▲	9.1% ▲
Q1 2020 TOTAL	\$524,900	123	149	0.82	\$493,000
% CHANGE (+/-)	14.3% ▲	25.2% ▼	8% ▼	18.3% ▼	18.3% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	53	88	▼
TOWN/LINK HOMES	48	54	▼
APARTMENT/CONDO	36	70	▼
TOTAL	137	212	▼
SALES TO NEW RATIO	0.67	0.64	▲

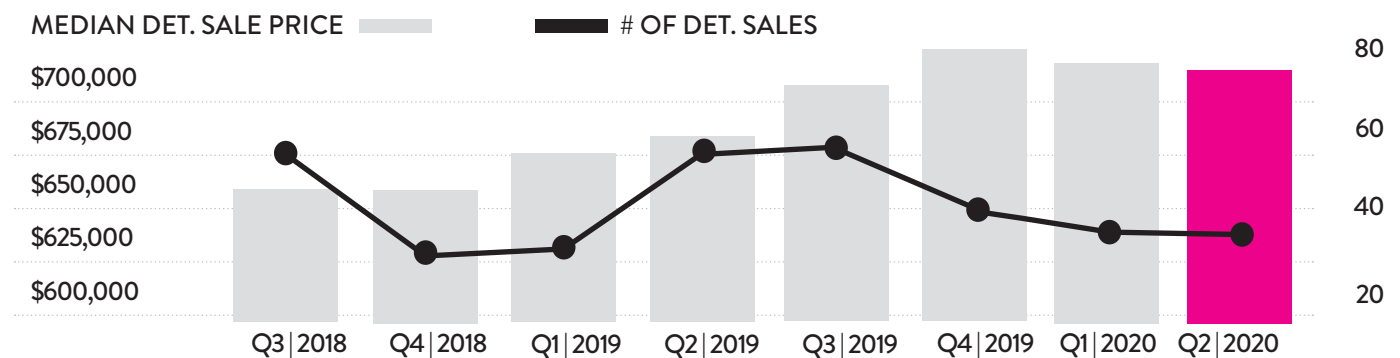
Q2 SALES BY INVENTORY TYPE



\$707,500
DETACHED MEDIAN SALE

\$525,000
TOWN/LINK MEDIAN SALE

\$375,000
APMNT/CONDO MEDIAN SALE



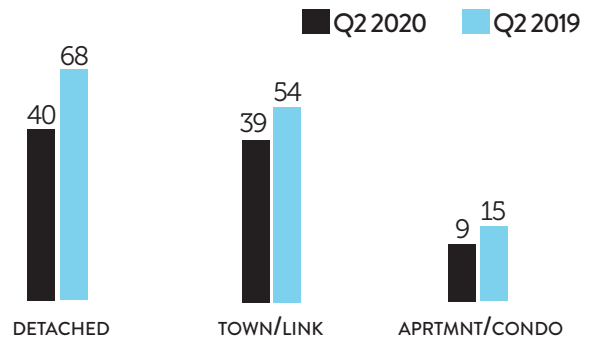
EAST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$552,500	88	112	0.78	\$545,000
Q2 2019 TOTAL	\$525,000	137	189	0.72	\$500,000
% CHANGE (+/-)	5.2% ▲	35.8% ▼	40.7% ▼	8.3% ▲	9% ▲
Q1 2020 TOTAL	\$553,000	101	111	0.91	\$565,000
% CHANGE (+/-)	0.10% ▼	12.9% ▼	0.90% ▲	14.3% ▼	3.5% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	54	117	▼
TOWN/LINK HOMES	47	56	▼
APARTMENT/CONDO	11	16	▼
TOTAL	112	189	▼
SALES TO NEW RATIO	0.78	0.72	▲

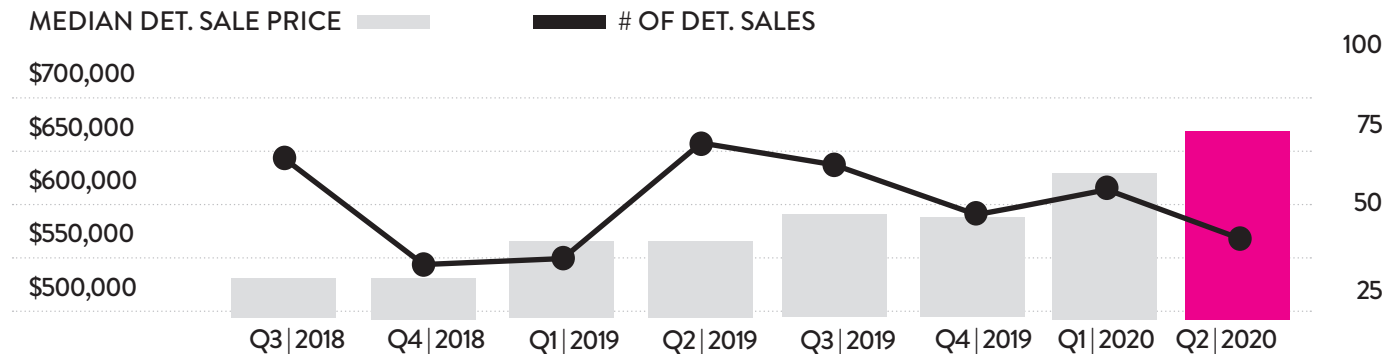
Q2 SALES BY INVENTORY TYPE



\$638,000
DETACHED MEDIAN SALE

\$535,000
TOWN/LINK MEDIAN SALE

\$389,900
APMNT/CONDO MEDIAN SALE



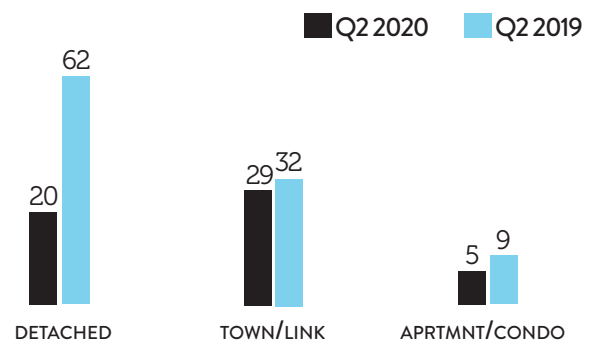
WEST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$519,900	74	94	0.79	\$540,000
Q2 2019 TOTAL	\$525,000	103	145	0.71	\$510,000
% CHANGE (+/-)	1% ▼	28.1% ▼	35.2% ▼	11.3% ▲	5.9% ▲
Q1 2020 TOTAL	\$537,000	73	99	0.73	\$503,000
% CHANGE (+/-)	3.2% ▼	1.4% ▲	5% ▼	8.2% ▲	7.4% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	45	87	▼
TOWN/LINK HOMES	39	52	▼
APARTMENT/CONDO	10	6	▲
TOTAL	94	145	▼
SALES TO NEW RATIO	0.79	0.71	▲

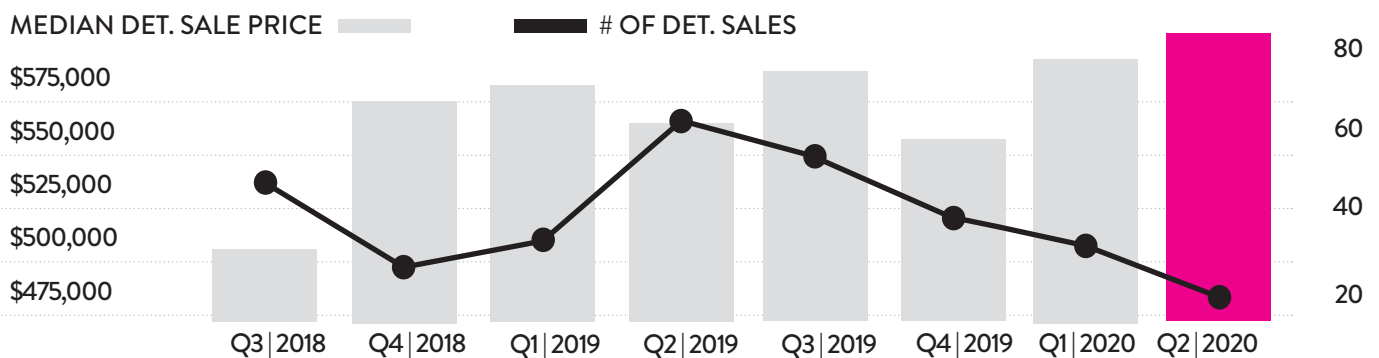
Q2 SALES BY INVENTORY TYPE



\$601,250
DETACHED MEDIAN SALE

\$427,500
TOWN/LINK MEDIAN SALE

\$310,000
APMNT/CONDO MEDIAN SALE



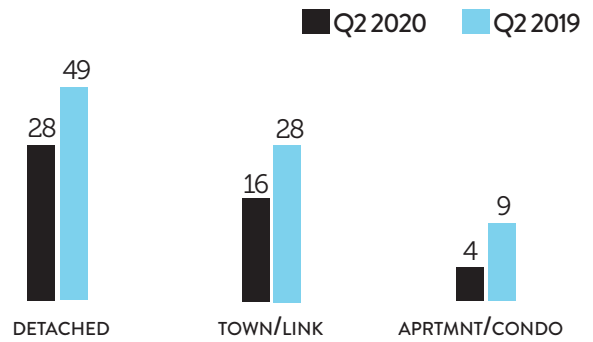
NORTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$529,500	48	60	0.80	\$587,000
Q2 2019 TOTAL	\$532,450	86	106	0.81	\$514,450
% CHANGE (+/-)	0.5% ▼	44.2% ▼	43.4% ▼	1.2% ▼	14.1% ▲
Q1 2020 TOTAL	\$549,900	51	74	0.69	\$555,000
% CHANGE (+/-)	3.6% ▼	5.9% ▼	18.9% ▼	15.9% ▲	5.8% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	29	64	▼
TOWN/LINK HOMES	18	33	▼
APARTMENT/CONDO	13	9	▲
TOTAL	60	106	▼
SALES TO NEW RATIO	0.80	0.81	▼

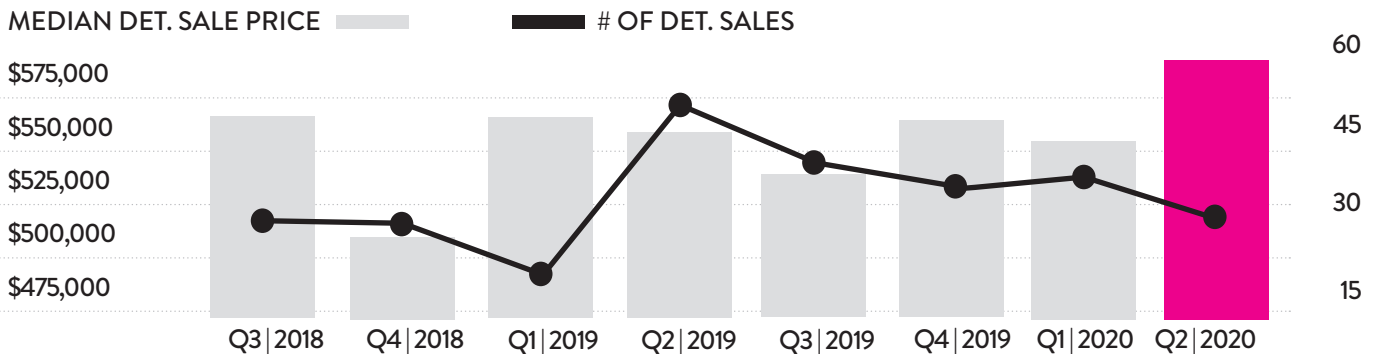
Q2 SALES BY INVENTORY TYPE



\$599,900
DETACHED MEDIAN SALE

\$575,000
TOWN/LINK MEDIAN SALE

\$427,067
APMNT/CONDO MEDIAN SALE



TW Q2

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COMPLETE DATA

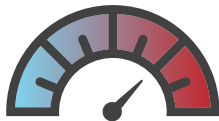
Kitchener
+ Waterloo

COMPLETE DATA

Cities of
Kitchener
+ Waterloo

Q2 | SALES TO
new listing ratio

Between 0.4 and 0.6
is considered a balanced market



0.74

INSIDE THE NUMBERS

If you want my future, forget my past.

Plenty of smart people were calling for a tough time through this COVID-era in KW real estate. While the proceeding months leading into Q2 were certainly 'spicy', that all came to a screeching halt with sales and new inventory volumes dipping down as low as 70% Y/Y during the first few weeks of the quarter. But then it all changed. Once again, the people of the world decided to spice up their life.

With a little shake to the left and shake to the right, volumes returned and stagnant sale prices began the climb back upwards again. Even through all of this turmoil, the demand for KW real estate has never been greater.

So, tell us what you want, what you really, really want in KW and we will certainly help you find it.

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

	Q2 2020	% Chg (Y)	Q2 2019	% Chg (Q)	Q1 2020
MEDIAN DET. SALE PRICE	\$630,000	9.6% ▲	\$575,000	0.8% ▲	\$625,000
NUMBER OF NEW SALES	1157	34.6% ▼	1769	2.2% ▼	1183
MEDIAN DAYS ON MARKET	11	2 days ▼	13	3 days ▲	8
NEW INVENTORY	1556	40.2% ▼	2601	4.2% ▼	1625

UP & DOWN
quick review

- ▲15% Y/Y increase in East Kitchener median sale price. A full year as a total beast in the East.
- ▼52% Y/Y reduction in West Waterloo new inventory. Some of the tightest inventory in the Region.
- ▲0% Y/Y increase in East Waterloo detached median sale price. Set to escalate in this new COVID-world.
- ▼4% Y/Y reduction in Downtown Kitchener median condo sale price. This trend is beginning to reverse and hard.
- ▲7% Y/Y increase in West Kitchener median list price. That 500k mark has been passed. And smashed.
- ▼44% Q/Q drop in Uptown Waterloo sales to new listing ratio. A blip or the start of a trip?
- ▲16% Y/Y increase in Uptown Waterloo detached median sale price. Even shorter supply fueling this fire.
- ▼38% Y/Y drop in West Kitchener inventory. A substantial rollback of over 400 total units.

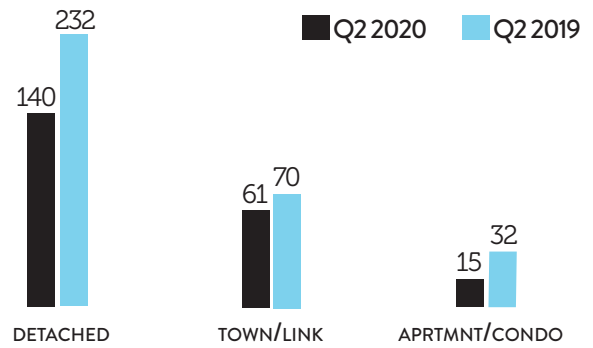
EAST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$554,500	216	296	0.73	\$550,000
Q2 2019 TOTAL	\$499,450	334	470	0.71	\$477,722
% CHANGE (+/-)	11% ▲	35.3% ▼	37% ▼	2.8% ▲	15.1% ▲
Q1 2020 TOTAL	\$500,000	258	330	0.78	\$537,500
% CHANGE (+/-)	10.9% ▲	16.3% ▼	10.3% ▼	6.4% ▼	2.3% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	189	328	▼
TOWN/LINK HOMES	73	102	▼
APARTMENT/CONDO	34	40	▼
TOTAL	296	470	▼
SALES TO NEW RATIO	0.73	0.71	▲

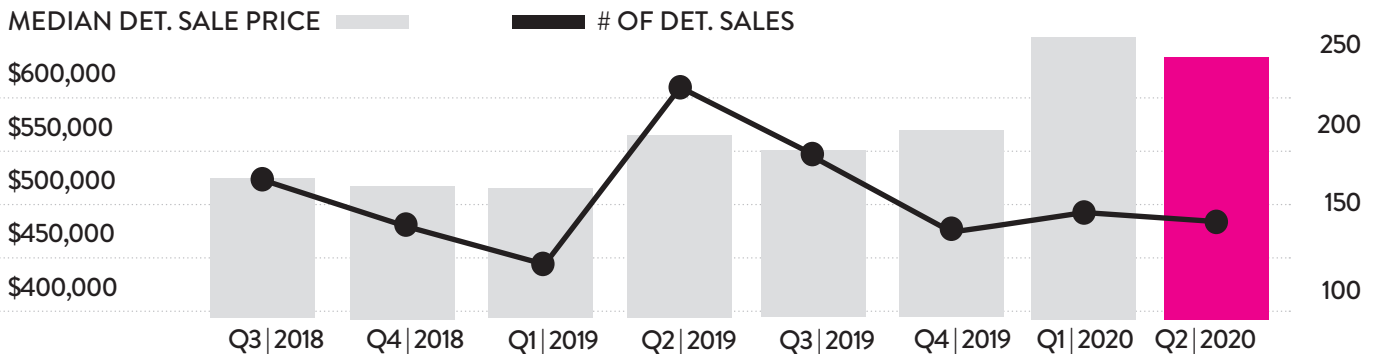
Q2 SALES BY INVENTORY TYPE



\$604,000
DETACHED MEDIAN SALE

\$448,500
TOWN/LINK MEDIAN SALE

\$306,000
APMNT/CONDO MEDIAN SALE



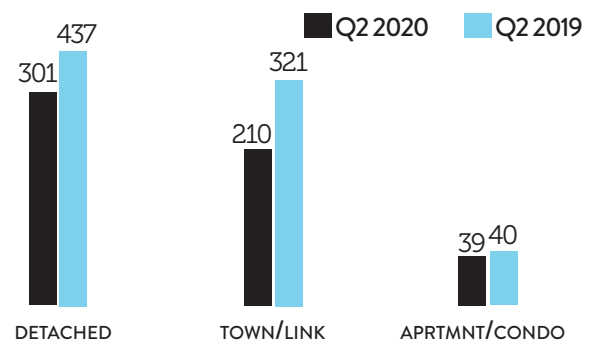
WEST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$534,900	550	713	0.77	\$528,750
Q2 2019 TOTAL	\$499,900	798	1141	0.70	\$472,000
% CHANGE (+/-)	7% ▲	31% ▼	37.5% ▼	10% ▲	12% ▲
Q1 2020 TOTAL	\$500,000	556	748	0.74	\$526,000
% CHANGE (+/-)	6.9% ▲	1% ▼	4.7% ▼	4% ▲	0.5% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	406	692	▼
TOWN/LINK HOMES	255	399	▼
APARTMENT/CONDO	52	50	▲
TOTAL	713	1141	▼
SALES TO NEW RATIO	0.77	0.70	▲

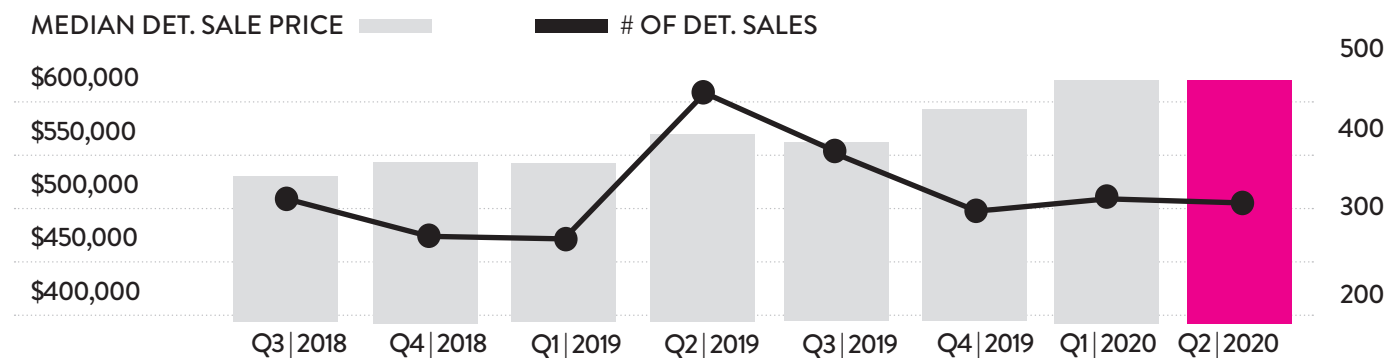
Q2 SALES BY INVENTORY TYPE



\$630,000
DETACHED MEDIAN SALE

\$446,500
TOWN/LINK MEDIAN SALE

\$310,000
APMNT/CONDO MEDIAN SALE



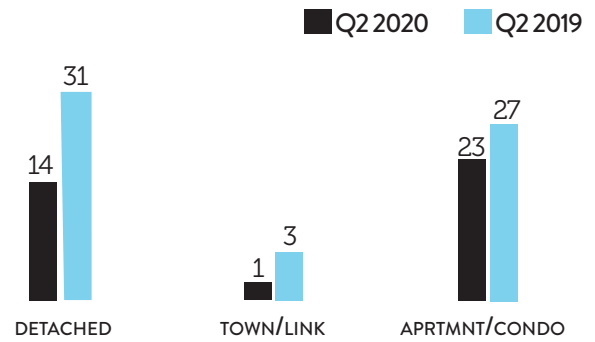
DOWNTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$439,900	38	68	0.56	\$433,500
Q2 2019 TOTAL	\$399,900	61	111	0.55	\$408,000
% CHANGE (+/-)	10% ▲	377% ▼	38.7% ▼	18% ▲	6.2% ▲
Q1 2020 TOTAL	\$440,000	46	91	0.50	\$442,750
% CHANGE (+/-)	0.02% ▼	174% ▼	25.3% ▼	12% ▲	2.1% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	21	44	▼
TOWN/LINK HOMES	4	8	▼
APARTMENT/CONDO	43	59	▼
TOTAL	68	111	▼
SALES TO NEW RATIO	0.56	0.55	▲

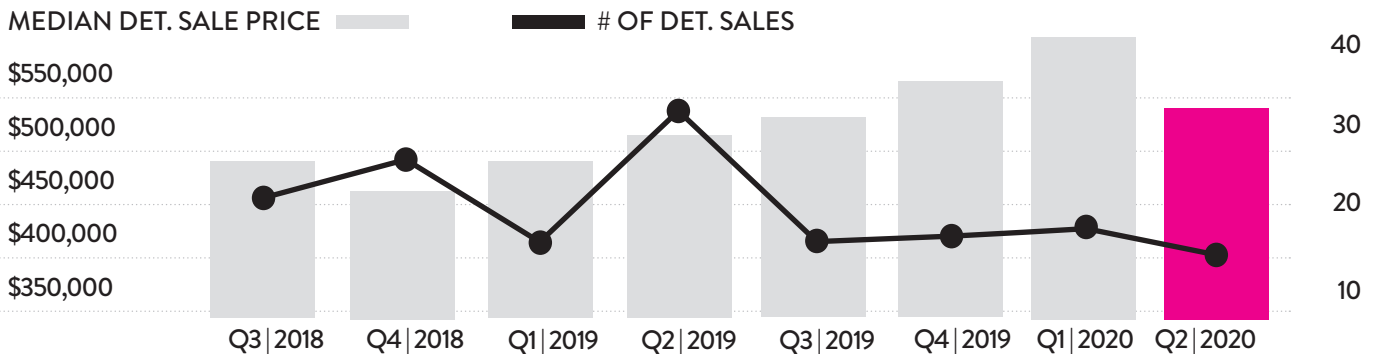
Q2 SALES BY INVENTORY TYPE



\$517,500
DETACHED MEDIAN SALE

\$462,000
TOWN/LINK MEDIAN SALE

\$355,000
APMNT/CONDO MEDIAN SALE



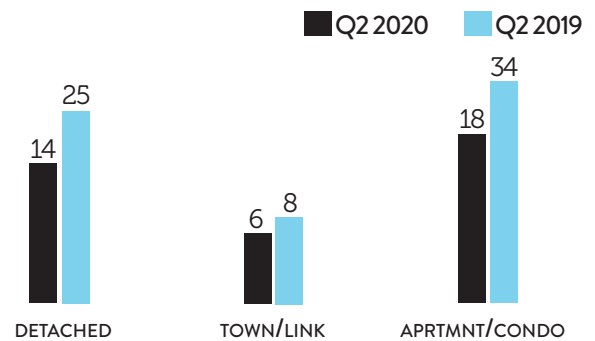
UPTOWN WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$500,000	38	85	0.45	\$530,000
Q2 2019 TOTAL	\$480,000	67	107	0.63	\$470,000
% CHANGE (+/-)	4.2% ▲	43.2% ▼	20.6% ▼	28.6% ▼	12.8% ▲
Q1 2020 TOTAL	\$512,450	48	60	0.80	\$542,500
% CHANGE (+/-)	2.4% ▼	20.8% ▼	41.7% ▲	43.7% ▼	2.3% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	25	34	▼
TOWN/LINK HOMES	14	19	▼
APARTMENT/CONDO	46	54	▼
TOTAL	85	107	▼
SALES TO NEW RATIO	0.45	0.63	▼

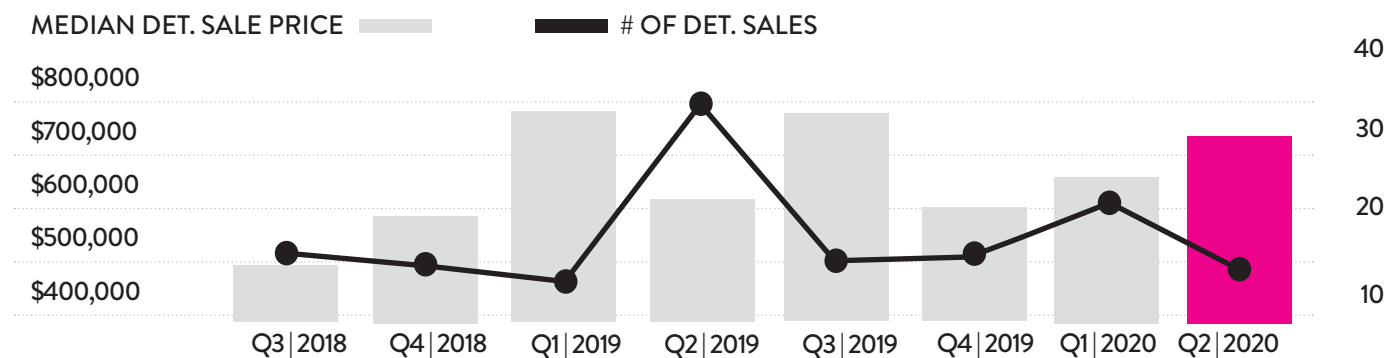
Q2 SALES BY INVENTORY TYPE



\$685,000
DETACHED MEDIAN SALE

\$496,500
TOWN/LINK MEDIAN SALE

\$433,950
APMNT/CONDO MEDIAN SALE



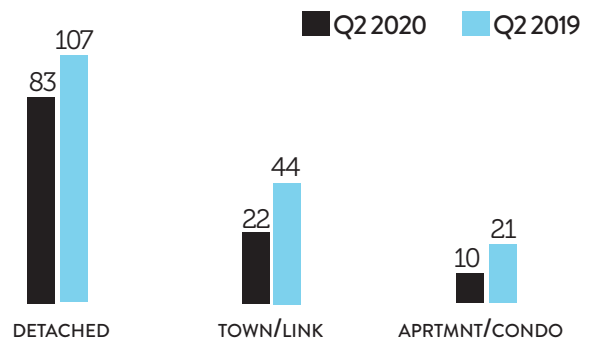
EAST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$569,900	115	147	0.78	\$594,000
Q2 2019 TOTAL	\$524,888	172	239	0.72	\$550,150
% CHANGE (+/-)	8.6% ▲	33.1% ▼	38.5% ▼	8.3% ▲	8% ▲
Q1 2020 TOTAL	\$550,000	81	119	0.68	\$591,500
% CHANGE (+/-)	3.6% ▲	42% ▲	23.5% ▲	14.7% ▲	0.42% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	93	152	▼
TOWN/LINK HOMES	28	55	▼
APARTMENT/CONDO	26	32	▼
TOTAL	147	239	▼
SALES TO NEW RATIO	0.78	0.72	▲

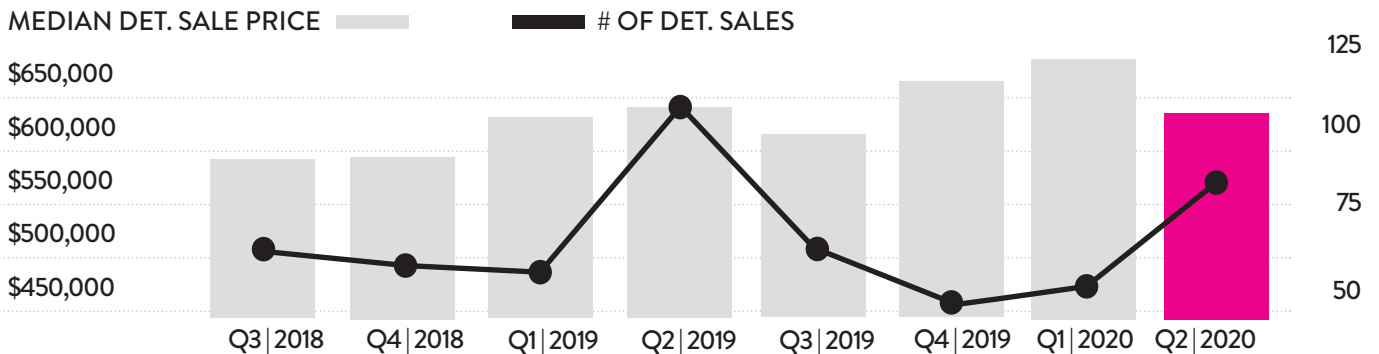
Q2 SALES BY INVENTORY TYPE



\$611,000
DETACHED MEDIAN SALE

\$435,500
TOWN/LINK MEDIAN SALE

\$357,500
APMNT/CONDO MEDIAN SALE



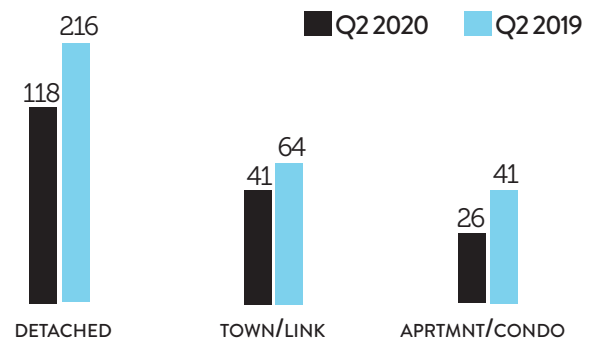
WEST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$599,900	185	247	0.75	\$592,000
Q2 2019 TOTAL	\$575,000	321	510	0.63	\$568,000
% CHANGE (+/-)	3% ▲	42.4% ▼	51.6% ▼	19% ▲	4.2% ▲
Q1 2020 TOTAL	\$592,450	194	286	0.68	\$600,000
% CHANGE (+/-)	12% ▲	4.6% ▼	13.6% ▼	10.3% ▲	1.3% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
DETACHED HOMES	154	337	▼
TOWN/LINK HOMES	46	93	▼
APARTMENT/CONDO	47	80	▼
TOTAL	247	510	▼
SALES TO NEW RATIO	0.75	0.63	▲

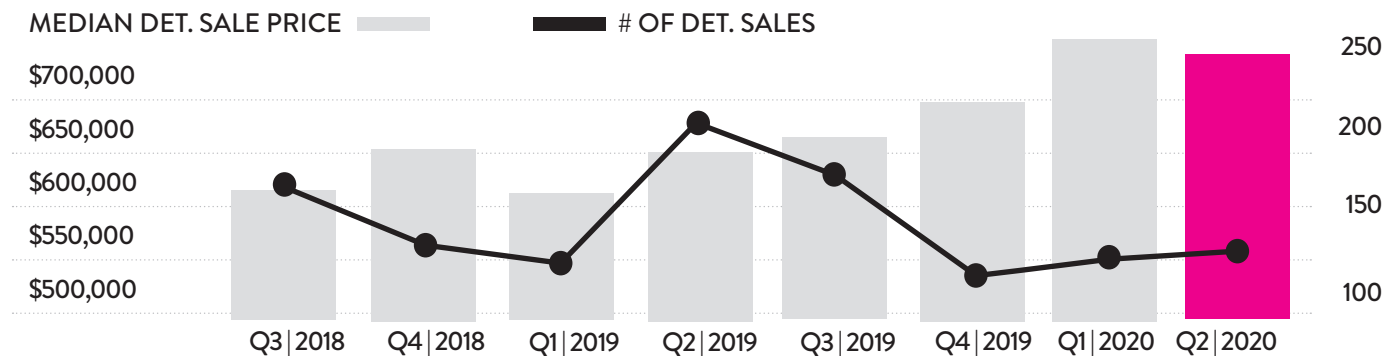
Q2 SALES BY INVENTORY TYPE



\$695,000
DETACHED MEDIAN SALE

\$460,000
TOWN/LINK MEDIAN SALE

\$332,500
APMNT/CONDO MEDIAN SALE



TW 2

20

20

Leading REAL ESTATE COMPANIES OF THE WORLD™
TRILLIUMWEST
REAL ESTATE BROKERAGE

COMPLETE DATA
Townships

COMPLETE DATA

The Townships

INSIDE THE NUMBERS

Miss the beat, you lose the rhythm.

Even through a pandemic, no beats were missed, not a single one. The COVID-effect has brought the thought to more and more people that this is the time that they 'might as well jump' to the country-side. The drive to leave urban centers and pursue a life with more spacious environs is real and has led to an explosion in demand for real estate in the Townships over the past few months. This movement isn't likely to stop any time soon, as a more than 5% increase in median detached sale price over the last quarter reveals.

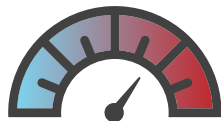
While the sample sizes are small, we feel that this trend of dwindling supply and heavily increasing demand will only lead to exponential price jumps in the following Q's.

Making that country dream a reality will take patience and great advice with help from your trusted Realtor®. Remember, only fools rush in and only time will tell if we stand the test of time.

Q2 | SALES TO

new listing ratio

Between 0.4 and 0.6 is considered a balanced market



0.71

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

	Q2 2020	% Chg (Y)	Q2 2019	% Chg (Q)	Q1 2020
MEDIAN DET. SALE PRICE	\$715,215	15.3% ▲	\$620,000	5.2% ▲	\$680,000
NUMBER OF NEW SALES	412	20.1% ▼	516	26.8% ▲	325
MEDIAN DAYS ON MARKET	14	1 day ▼	15	1 day ▲	13
NEW INVENTORY	582	34.3% ▼	886	7.4% ▲	542

UP & DOWN quick review

- ▲15% Y/Y increase in the median detached sale price across the Townships. The migration out is real.
- ▲30% Y/Y spike in Puslinch median sale price. The hottest place in the Region. Heck, maybe the planet.
- ▲20% Y/Y spike in North Dumfries median sale price. A new country challenger emerged and is here to stay.
- ▲15% Y/Y spike in the Centre Wellington median sale price. That threshold 600k mark has now been surpassed.

- ▼53% Y/Y decrease in Guelph Eramosa new inventory. Increased prices reflect the drastic lack of supply.
- ▼38% Y/Y drop in the Wilmot new inventory. No surprise the median sale price blasted straight upwards.
- ▼6% Q/Q decrease in Woolwich median sale price. An odd trend that is highly unlikely to stick around long.
- ▼32% Y/Y reduction in Puslinch new inventory. Adding fuel to an already raging market temperature.

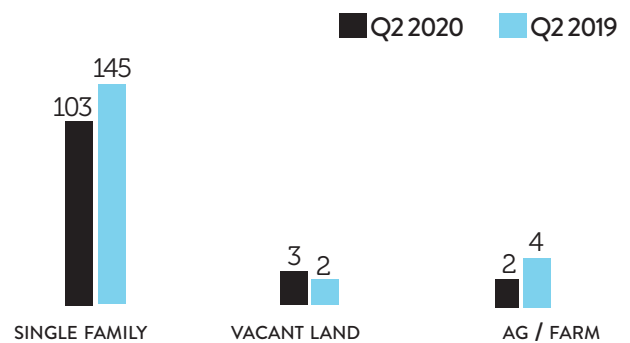
CENTRE WELLINGTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$635,000	108	139	0.78	\$615,000
Q2 2019 TOTAL	\$599,000	151	216	0.70	\$535,000
% CHANGE (+/-)	6% ▲	28.5% ▼	35.6% ▼	11.4% ▲	14.9% ▲
Q1 2020 TOTAL	\$626,500	89	150	0.59	\$575,000
% CHANGE (+/-)	13% ▲	21.3% ▲	73% ▼	32.2% ▲	6.9% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	135	202	▼
VACANT LAND	4	10	▼
AG / FARM	0	4	▼
TOTAL	139	216	▼
SALES TO NEW RATIO	0.78	0.70	▲

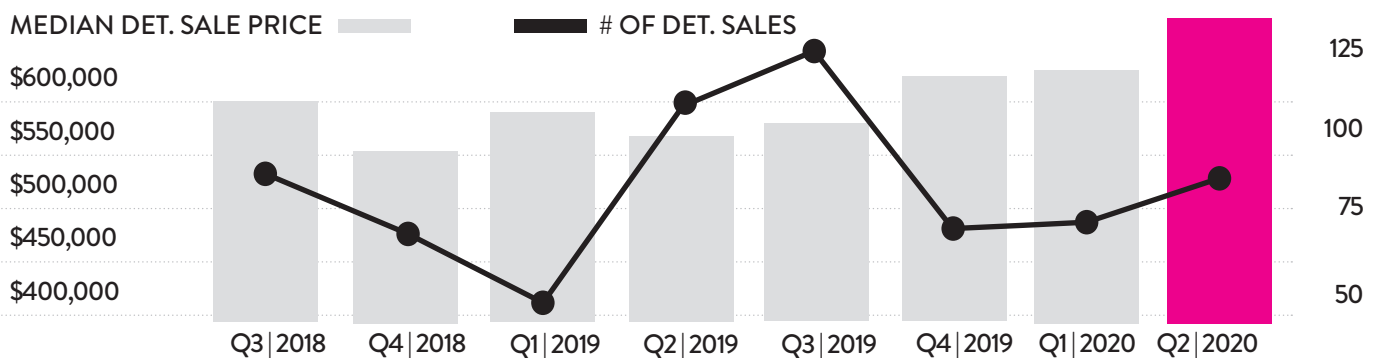
Q2 SALES BY INVENTORY TYPE



\$600,000
SINGLE FAMILY MEDIAN

\$730,000
VACANT LAND MEDIAN

\$1,593,750
AG / FARM MEDIAN



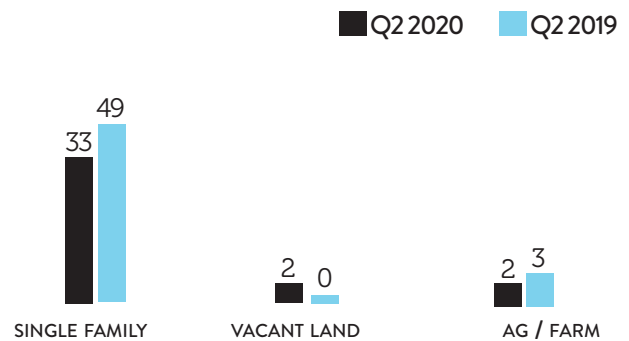
GUELPH ERAMOS

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$814,450	37	51	0.72	\$815,000
Q2 2019 TOTAL	\$749,900	52	108	0.48	\$715,000
% CHANGE (+/-)	8.6% ▲	28.8% ▼	52.8% ▼	50% ▲	14% ▲
Q1 2020 TOTAL	\$849,900	33	53	0.62	\$750,000
% CHANGE (+/-)	4.2% ▼	12.1% ▲	3.8% ▼	16.1% ▲	8.7% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	47	95	▼
VACANT LAND	1	5	▼
AG / FARM	3	8	▼
TOTAL	53	108	▼
SALES TO NEW RATIO	0.72	0.48	▲

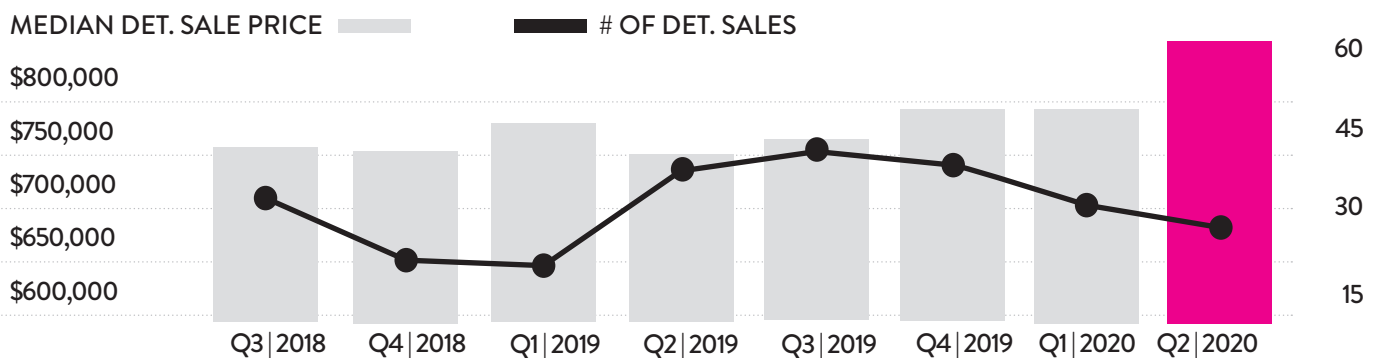
Q2 SALES BY INVENTORY TYPE



\$815,000
SINGLE FAMILY MEDIAN

\$457,000
VACANT LAND MEDIAN

\$1,368,900
AG / FARM MEDIAN



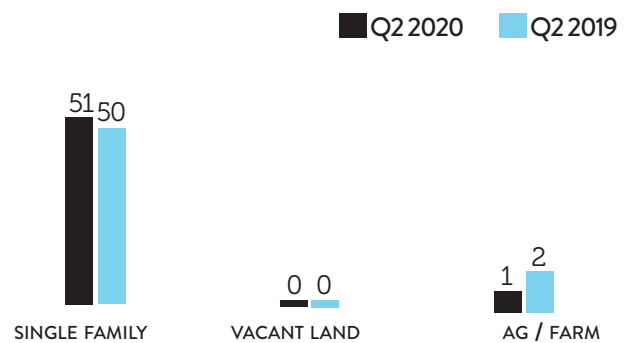
NORTH DUMFRIES

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$600,000	52	85	0.61	\$710,000
Q2 2019 TOTAL	\$569,900	52	123	0.42	\$590,000
% CHANGE (+/-)	5.3% ▲	=	30.9% ▼	45.2% ▲	20.3% ▲
Q1 2020 TOTAL	\$699,900	36	63	0.57	\$612,450
% CHANGE (+/-)	14.3% ▼	44.4% ▲	34.9% ▲	7% ▼	15.9% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	78	116	▼
VACANT LAND	4	3	▲
AG / FARM	3	4	▼
TOTAL	85	123	▼
SALES TO NEW RATIO	0.61	0.42	▲

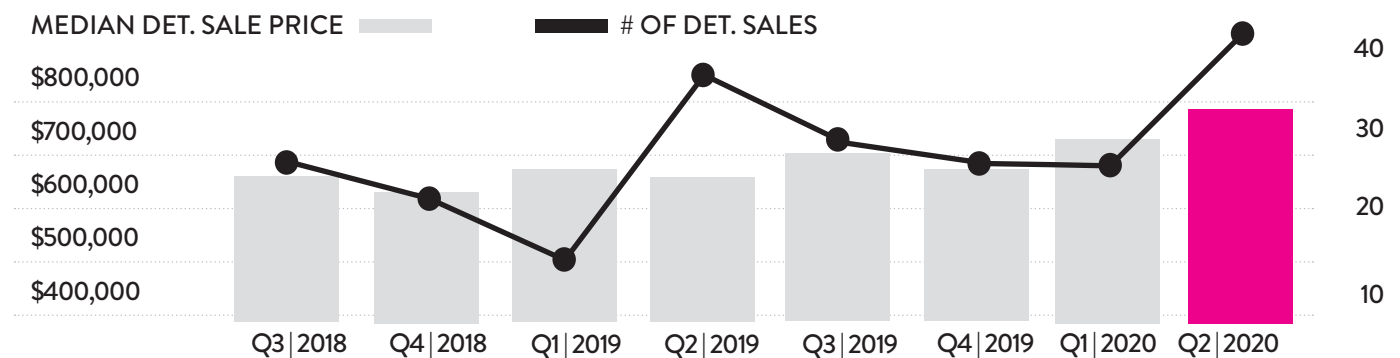
Q2 SALES BY INVENTORY TYPE



\$698,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$925,000
AG / FARM MEDIAN



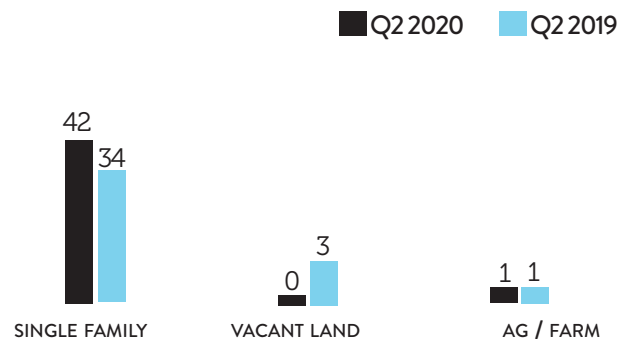
TOWNSHIP OF PUSLINCH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$1,279,000	42	64	0.66	\$1,195,000
Q2 2019 TOTAL	\$1,124,500	38	94	0.40	\$920,000
% CHANGE (+/-)	13.7% ▲	10.5% ▼	31.9% ▼	65% ▲	29.9% ▲
Q1 2020 TOTAL	\$1,232,500	22	58	0.38	\$825,000
% CHANGE (+/-)	3.8% ▲	91% ▲	10.3% ▲	73.7% ▲	44.8% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	57	81	▼
VACANT LAND	5	10	▼
AG / FARM	2	3	▼
TOTAL	64	94	▼
SALES TO NEW RATIO	0.66	0.40	▲

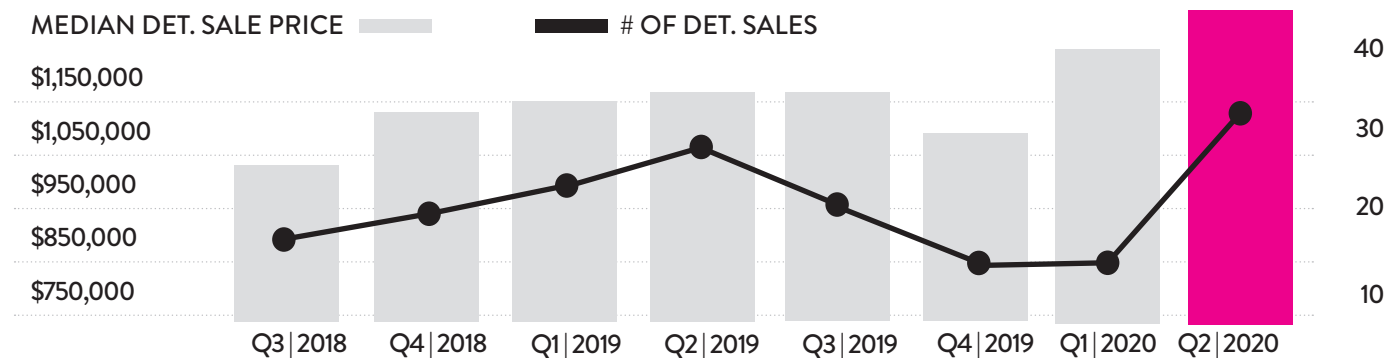
Q2 SALES BY INVENTORY TYPE



\$1,175,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$1,366,000
AG / FARM MEDIAN



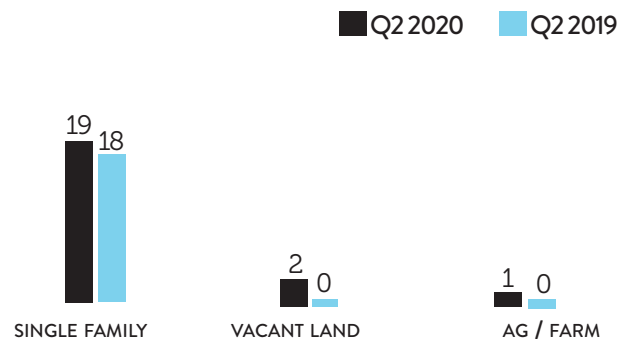
TOWNSHIP OF WELLESLEY

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$699,000	22	37	0.59	\$632,500
Q2 2019 TOTAL	\$679,900	18	41	0.44	\$627,500
% CHANGE (+/-)	2.8% ▲	22.2% ▲	9.7% ▼	34.1% ▲	0.80% ▲
Q1 2020 TOTAL	\$654,900	15	32	0.47	\$660,000
% CHANGE (+/-)	6.7% ▲	46.7% ▲	15.6% ▲	25.5% ▲	4.2% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	33	39	▼
VACANT LAND	2	1	▲
AG / FARM	2	1	▲
TOTAL	37	41	▼
SALES TO NEW RATIO	0.59	0.44	▲

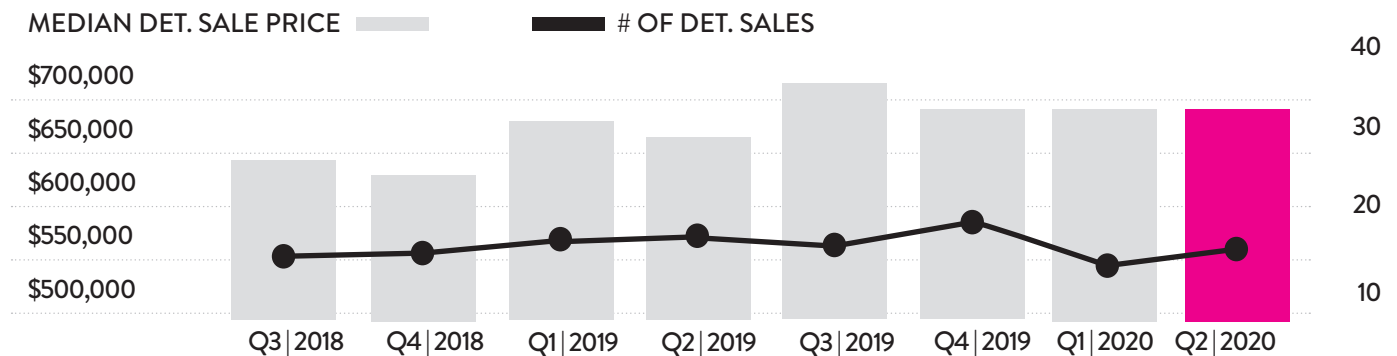
Q2 SALES BY INVENTORY TYPE



\$650,000
SINGLE FAMILY MEDIAN

\$528,250
VACANT LAND MEDIAN

\$2,200,000
AG / FARM MEDIAN



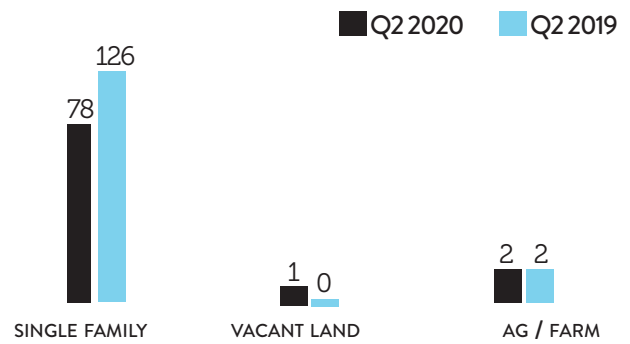
TOWNSHIP OF WILMOT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$677,400	81	113	0.72	\$650,000
Q2 2019 TOTAL	\$599,900	128	181	0.71	\$546,000
% CHANGE (+/-)	12.9% ▲	36.7% ▼	37.6% ▼	14% ▲	19% ▲
Q1 2020 TOTAL	\$649,900	77	109	0.71	\$583,500
% CHANGE (+/-)	4.2% ▲	5.2% ▲	3.7% ▲	14% ▼	11.4% ▲

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	108	173	▼
VACANT LAND	2	3	▼
AG / FARM	3	5	▼
TOTAL	113	181	▼
SALES TO NEW RATIO	0.72	0.71	▲

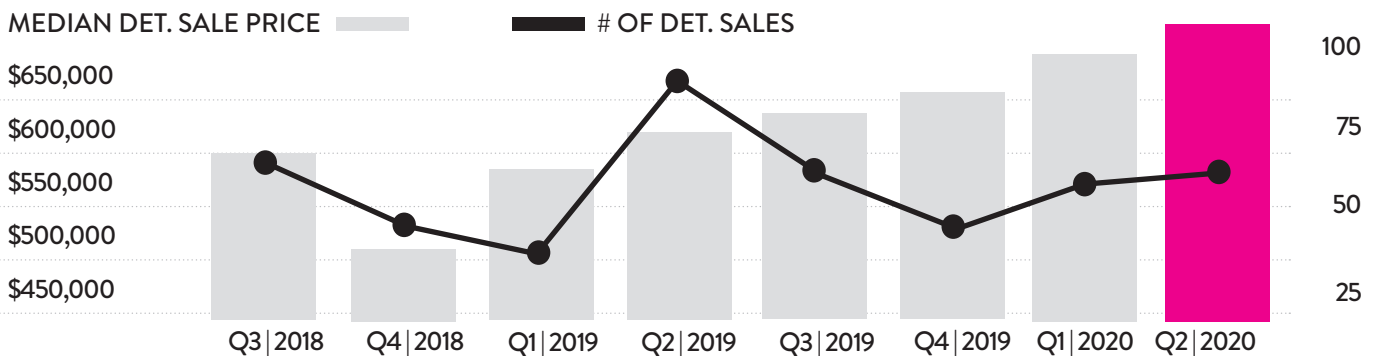
Q2 SALES BY INVENTORY TYPE



\$648,750
SINGLE FAMILY MEDIAN

\$380,000
VACANT LAND MEDIAN

\$1,900,000
AG / FARM MEDIAN



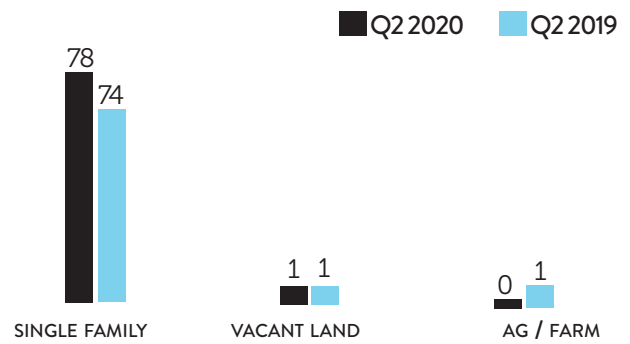
TOWNSHIP OF WOOLWICH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q2 2020 TOTAL	\$634,900	79	93	0.85	\$602,000
Q2 2019 TOTAL	\$560,000	76	119	0.64	\$541,500
% CHANGE (+/-)	13.4% ▲	3.9% ▲	21.8% ▼	32.8% ▲	11.1% ▲
Q1 2020 TOTAL	\$675,000	53	77	0.69	\$640,000
% CHANGE (+/-)	5.9% ▼	49% ▲	20.8% ▲	23.2% ▲	5.9% ▼

Q2 NEW INVENTORY

	Q2 2020	Q2 2019	TREND
SINGLE FAMILY	90	118	▼
VACANT LAND	3	1	▲
AG / FARM	0	0	▼
TOTAL	93	119	▼
SALES TO NEW RATIO	0.85	0.64	▲

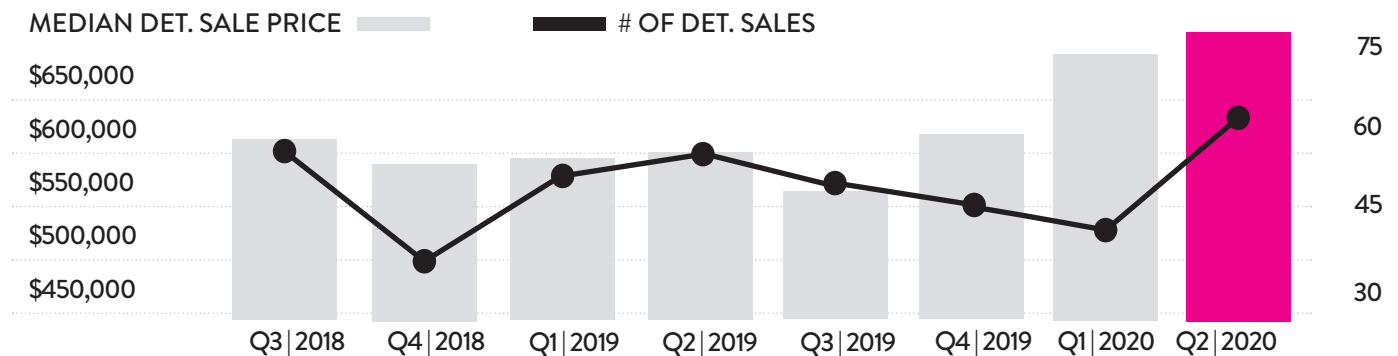
Q2 SALES BY INVENTORY TYPE



\$619,250
SINGLE FAMILY MEDIAN

\$370,000
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



A LITTLE ABOUT



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

