

TW 4 2019

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TRILLIUMWEST

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TRILLIUMWEST
QUARTERLY DATA REPORT

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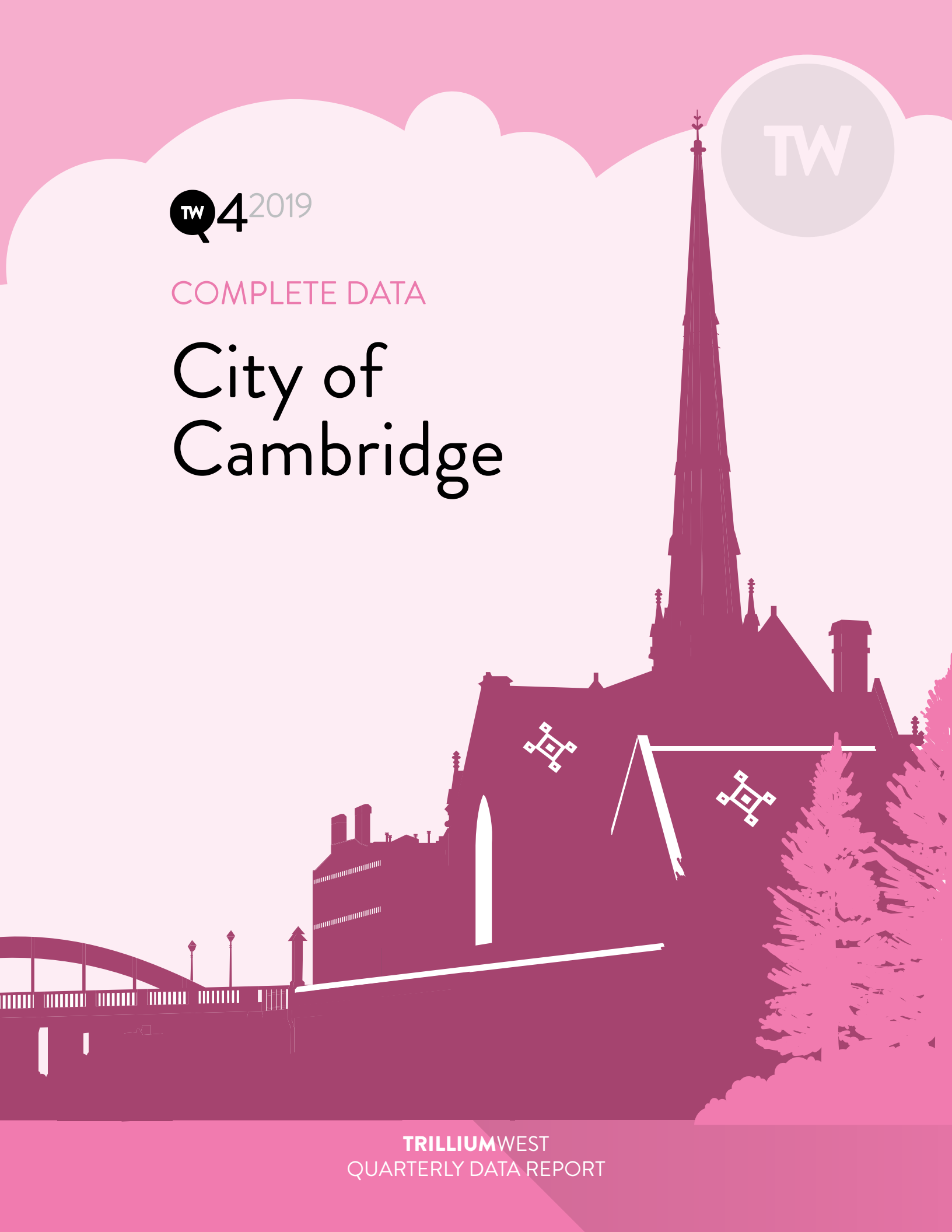
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4 2019

COMPLETE DATA

City of Cambridge



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

City of Cambridge

Q4 | SALES TO

new listing ratio

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

0.92

INSIDE THE NUMBERS

How does this story end?

Epic, crazy, uncontrollable, unsustainable - all adjectives that you could use to describe the end to a memorable year in Cambridge. For many, you could probably also add the word 'un-affordable' in there now as well. As Buyers enjoyed a year-long binge on anything and everything Cambridge real estate, we are now left to analyze the numerical pieces and properly plan for the future.

This is not going to be easy.

Hespeler has become one of the most expensive areas across the entire Region. Will it continue to be more expensive than anywhere in the entire city of Guelph? History says 'no', but the limited supply pipeline says 'why not'.

Hold on tight, this story is about to get real interesting in Q1.

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

	Q4 2019	% Chg (Y)	Q4 2018	% Chg (Q)	Q3 2019
MEDIAN DET. SALE PRICE	\$537,000	11.9% ▲	\$480,000	2% ▲	\$526,250
NUMBER OF NEW SALES	424	3.4% ▲	410	25.9% ▼	572
MEDIAN DAYS ON MARKET	15	3 days ▼	18	1 day ▲	14
NEW INVENTORY	461	9.4% ▼	509	43.4% ▼	814

UP & DOWN quick review

▲19%

Y/Y increase in the Preston median sale price. Another set of epic data, but will it last?

▼1%

Q/Q decrease in the East Galt median sale price. Activity was there, but prices stumbled just a little.

▲45%

Y/Y spike in the Hespeler sales to new listing ratio. A value exceeding 1, that's some serious winter heat.

▼57%

Q/Q reduction in Hespeler new listings. That would likely explain the sky-rocketing sale prices.

▲12%

Y/Y increase in the Hespeler median sale price. Now one of the highest in the entire Region. Wow.

▼43%

Q/Q decrease in West Galt new inventory. You can't buy what isn't for sale & the ratio followed.

▲10%

Q/Q jump in the Preston sales volume. So hot it outperformed Q3 for the first time.

▼49%

Q/Q decrease in East Galt new inventory. Similar problem in the city's highest volume area.

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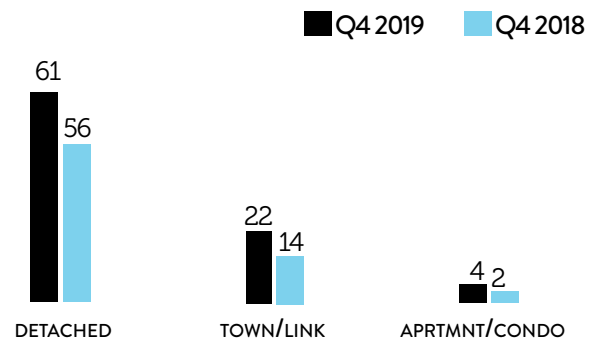
HESPELER CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$549,900	87	84	1.03	\$560,000
Q4 2018 TOTAL	\$489,695	72	77	0.94	\$497,500
% CHANGE (+/-)	12.3% ▲	20.8% ▲	9.1% ▲	9.6% ▲	12.6% ▲
Q3 2019 TOTAL	\$569,900	137	193	0.71	\$529,000
% CHANGE (+/-)	3.5% ▼	36.5% ▼	56.5% ▼	45.1% ▲	5.9% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	58	52	▲
TOWN/LINK HOMES	19	22	▼
APARTMENT/CONDO	7	3	▲
TOTAL	84	77	▲
SALES TO NEW RATIO	1.03	0.94	▲

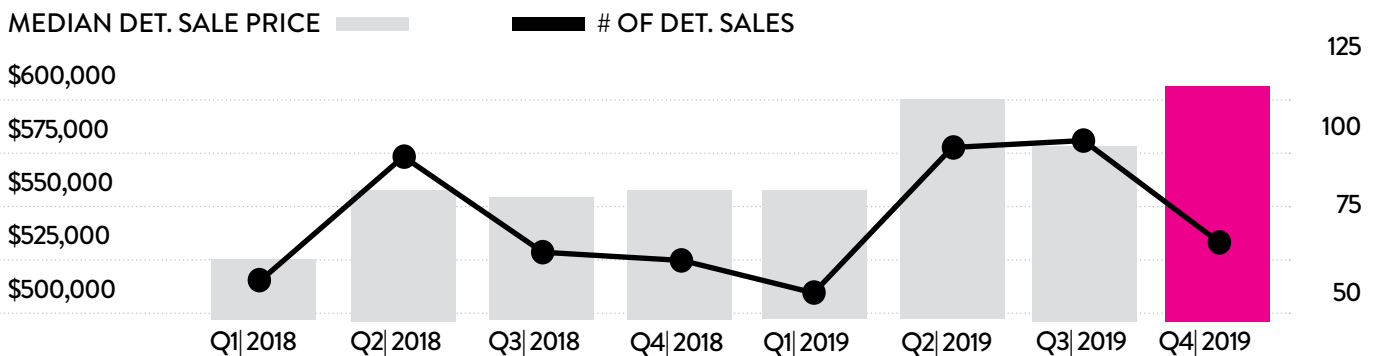
Q4 SALES BY INVENTORY TYPE



\$599,800
DETACHED MEDIAN SALE

\$416,495
TOWN/LINK MEDIAN SALE

\$318,250
APMNT/CONDO MEDIAN SALE



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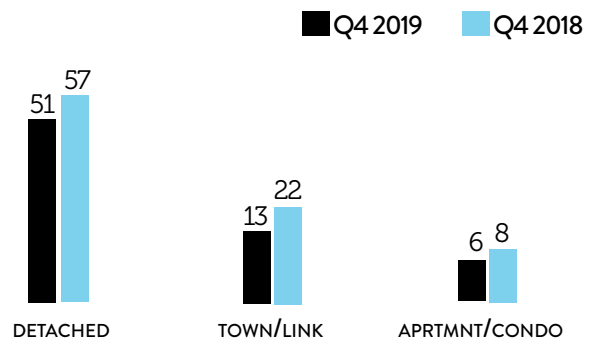
PRESTON CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$499,900	70	94	0.74	\$473,750
Q4 2018 TOTAL	\$449,900	89	112	0.79	\$399,000
% CHANGE (+/-)	11.1% ▲	21.3% ▼	16.1% ▼	6.3% ▼	18.7% ▲
Q3 2019 TOTAL	\$476,500	78	122	0.64	\$453,000
% CHANGE (+/-)	4.9% ▲	10.2% ▲	23% ▼	15.6% ▲	4.6% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	65	82	▼
TOWN/LINK HOMES	21	20	▲
APARTMENT/CONDO	8	10	▼
TOTAL	94	112	▼
SALES TO NEW RATIO	0.74	0.79	▼

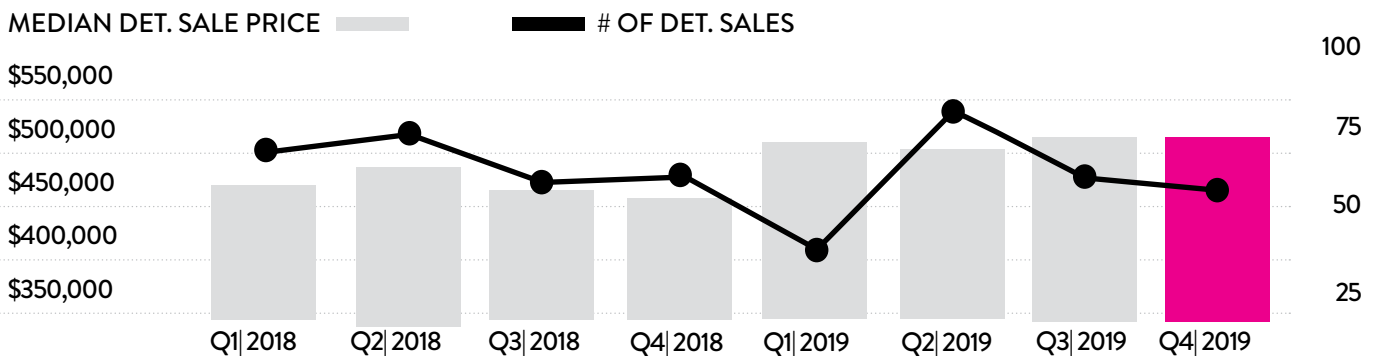
Q4 SALES BY INVENTORY TYPE



\$500,000
DETACHED MEDIAN SALE

\$425,100
TOWN/LINK MEDIAN SALE

\$308,500
APMNT/CONDO MEDIAN SALE



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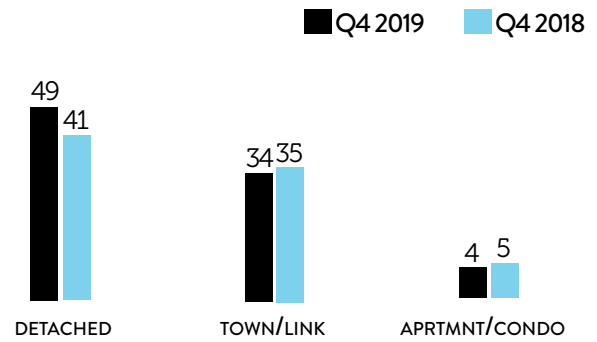
NORTH GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$477,450	87	90	0.96	\$480,100
Q4 2018 TOTAL	\$469,900	81	91	0.89	\$412,500
% CHANGE (+/-)	1.6% ▲	74% ▲	11% ▼	79% ▲	16.4% ▲
Q3 2019 TOTAL	\$499,900	108	139	0.78	\$471,250
% CHANGE (+/-)	4.5% ▼	19.4% ▼	35.2% ▼	23.1% ▲	1.9% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	53	52	▲
TOWN/LINK HOMES	34	34	=
APARTMENT/CONDO	3	5	▼
TOTAL	90	91	▼
SALES TO NEW RATIO	0.96	0.89	▲

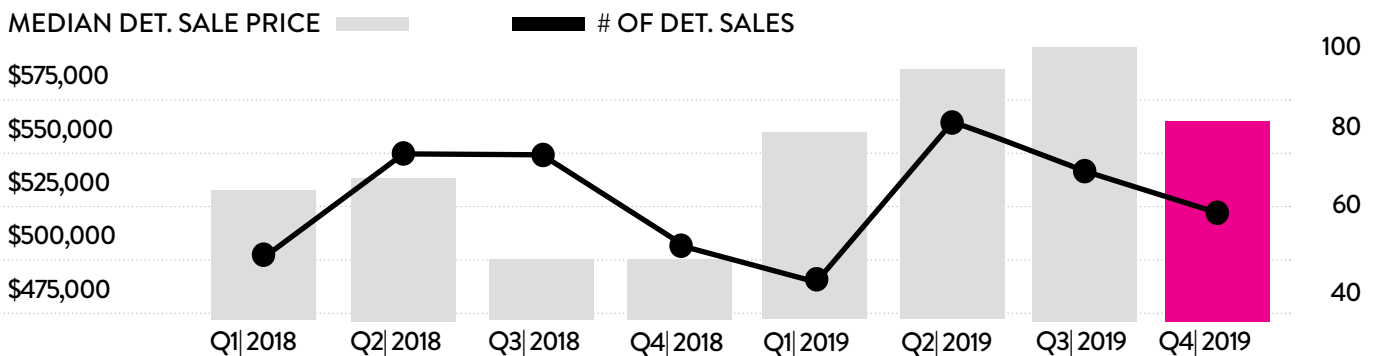
Q4 SALES BY INVENTORY TYPE



\$552,319
DETACHED MEDIAN SALE

\$424,500
TOWN/LINK MEDIAN SALE

\$278,700
APMNT/CONDO MEDIAN SALE



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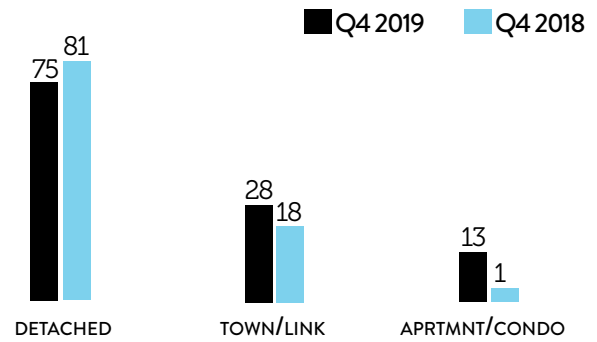
EAST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$419,900	116	119	0.97	\$444,000
Q4 2018 TOTAL	\$469,900	100	133	0.75	\$414,250
% CHANGE (+/-)	10.6% ▼	16% ▲	10.5% ▼	29.3% ▲	7.2% ▲
Q3 2019 TOTAL	\$459,900	165	231	0.71	\$447,500
% CHANGE (+/-)	8.7% ▼	29.7% ▼	48.4% ▼	36.6% ▲	0.8% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	74	109	▼
TOWN/LINK HOMES	22	23	▼
APARTMENT/CONDO	23	1	▲
TOTAL	119	133	▼
SALES TO NEW RATIO	0.97	0.75	▲

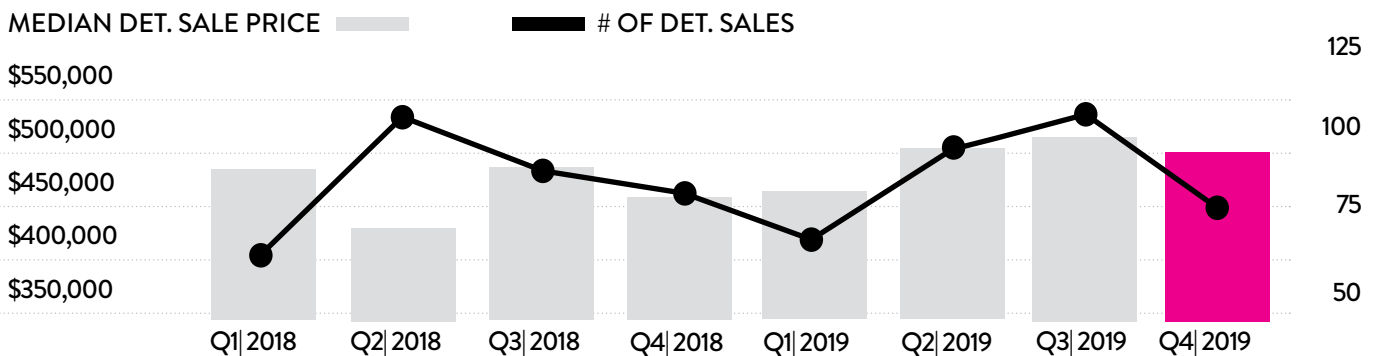
Q4 SALES BY INVENTORY TYPE



\$475,000
DETACHED MEDIAN SALE

\$391,307
TOWN/LINK MEDIAN SALE

\$315,000
APMNT/CONDO MEDIAN SALE



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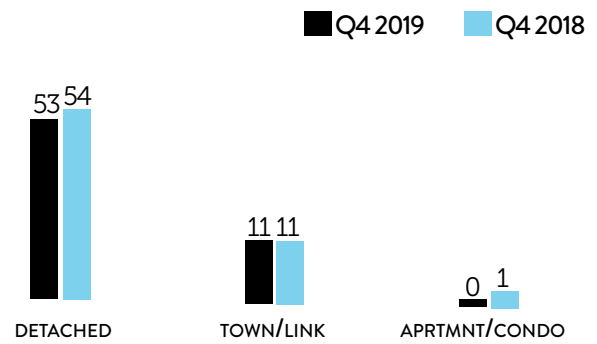
WEST GALT CAMBRIDGE

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$534,900	64	74	0.86	\$523,500
Q4 2018 TOTAL	\$494,900	66	89	0.74	\$471,500
% CHANGE (+/-)	8.1% ▲	3% ▼	16.8% ▼	16.2% ▲	11% ▲
Q3 2019 TOTAL	\$539,900	84	129	0.65	\$508,000
% CHANGE (+/-)	0.9% ▼	23.8% ▼	42.6% ▼	32.3% ▲	3% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	63	73	▼
TOWN/LINK HOMES	11	13	▼
APARTMENT/CONDO	0	3	▼
TOTAL	74	89	▼
SALES TO NEW RATIO	0.86	0.74	▲

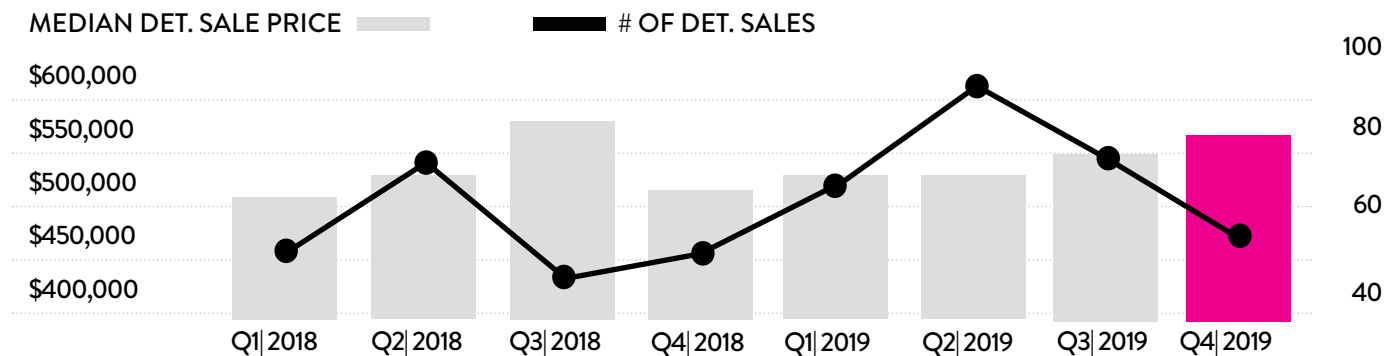
Q4 SALES BY INVENTORY TYPE



\$540,000
DETACHED MEDIAN SALE

\$380,000
TOWN/LINK MEDIAN SALE

N/A
APMNT/CONDO MEDIAN SALE



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COMPLETE DATA

City of Guelph



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City of Guelph

Q4 | SALES TO

new listing ratio

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

1.01

INSIDE THE NUMBERS

They came and they sure went.

Q4 was oddly an atypical finish to what was much more of a typical year in Guelph real estate. The first 3 quarters saw a return to a more consistent figures and pace of market activity. Q4 though kicked plenty of that consistency straight to the curb.

A huge bounce back Q for South Guelph prices really steered the market and the familiar old common enemy of Guelph real estate stepped to the forefront once again - lack of new home supply. A Q4 ratio in excess of 1 across the city signals an even tighter market ahead in a typical feverish Q1.

If we learned anything from the recent past, we see Q1 shaping up to resemble that of the infamous spring of 2017.

Better fasten those seat belts friends, it could be a fast & furious ride.

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

	Q4 2019	% Chg (Y)	Q4 2018	% Chg (Q)	Q3 2019
MEDIAN DET. SALE PRICE	\$582,500	3% ▲	\$565,250	1.3% ▼	\$590,000
NUMBER OF NEW SALES	465	14% ▲	408	23.8% ▼	610
MEDIAN DAYS ON MARKET	19	2 days ▼	21	2 days ▲	17
NEW INVENTORY	459	5.7% ▼	487	47.4% ▼	872

UP & DOWN quick review

▲97%

Q/Q increase in the North Guelph sales to new listing ratio. A full clearing of excess Q3 listings.

▼11%

Y/Y reduction in Downtown new inventory. The notoriously tight supply in the core got tighter.

▲22%

Q/Q increase in the South Guelph median sale price. A huge leap forward and back to expected figures.

▼1%

Q/Q decrease in the West Guelph median sale price. Capping of a year of very small change.

▲60%

Q/Q increase in the Midtown sales to new listing ratio. One of the hottest areas across the Region.

▼15%

Y/Y drop in Midtown new inventory. Subsequently, that ratio rose to an unprecedented new height.

▲33%

Y/Y increase in the East Guelph sales to new listing ratio. Absolutely el fuego on the East side.

▼11%

Y/Y reduction in East Guelph new inventory. Sales went up & so did the ratio. Big-time.

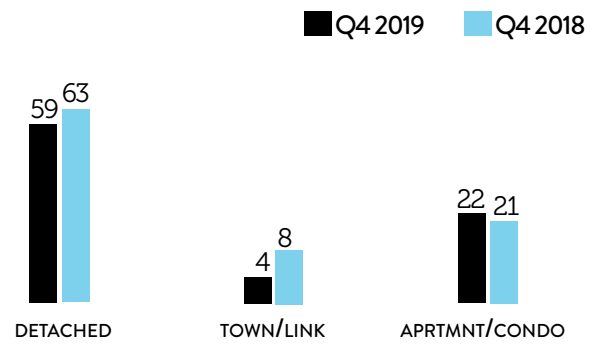
DOWNTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$524,900	85	90	0.94	\$495,000
Q4 2018 TOTAL	\$507,450	92	101	0.90	\$477,500
% CHANGE (+/-)	3.4% ▲	7.6% ▼	10.9% ▼	4.4% ▲	3.7% ▲
Q3 2019 TOTAL	\$519,900	110	158	0.69	\$503,375
% CHANGE (+/-)	1% ▲	22.7% ▼	43% ▼	36.2% ▲	1.7% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	61	69	▼
TOWN/LINK HOMES	10	14	▼
APARTMENT/CONDO	19	18	▲
TOTAL	90	101	▼
SALES TO NEW RATIO	0.94	0.90	▲

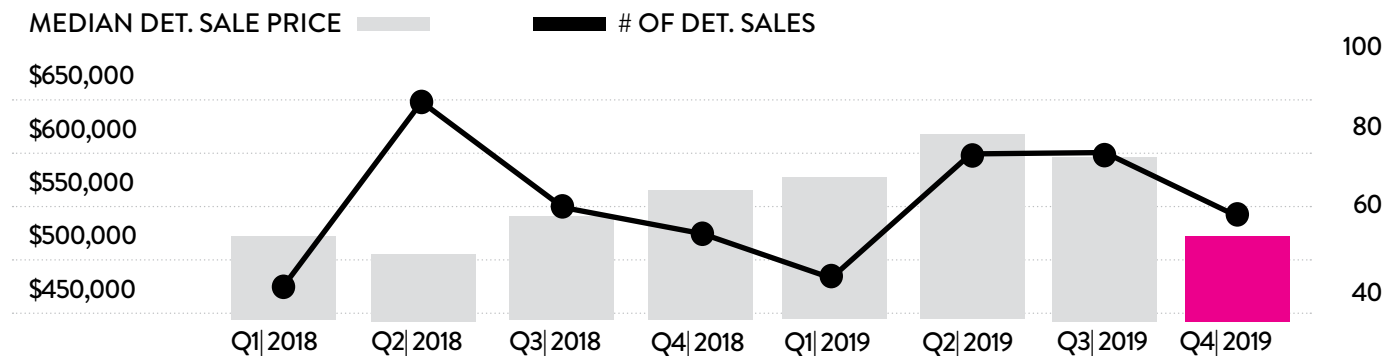
Q4 SALES BY INVENTORY TYPE



\$502,000
DETACHED MEDIAN SALE

\$611,250
TOWN/LINK MEDIAN SALE

\$440,000
APMNT/CONDO MEDIAN SALE



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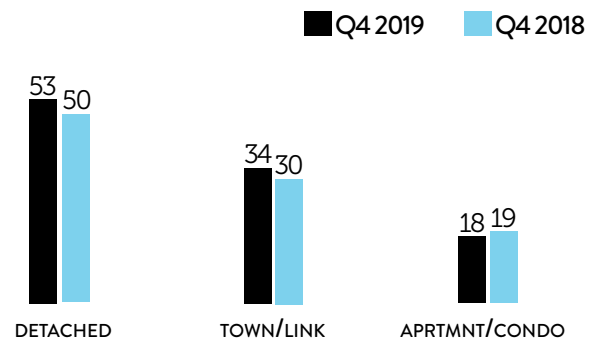
MIDTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$584,900	105	104	1.01	\$555,100
Q4 2018 TOTAL	\$579,900	99	123	0.80	\$507,500
% CHANGE (+/-)	0.9% ▲	6.1% ▲	15.4% ▼	26.2% ▲	9.4% ▲
Q3 2019 TOTAL	\$607,450	119	188	0.63	\$580,000
% CHANGE (+/-)	3.7% ▼	11.8% ▼	44.7% ▼	60.3% ▲	4.3% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	54	70	▼
TOWN/LINK HOMES	35	35	=
APARTMENT/CONDO	15	18	▼
TOTAL	104	123	▼
SALES TO NEW RATIO	1.01	0.80	▲

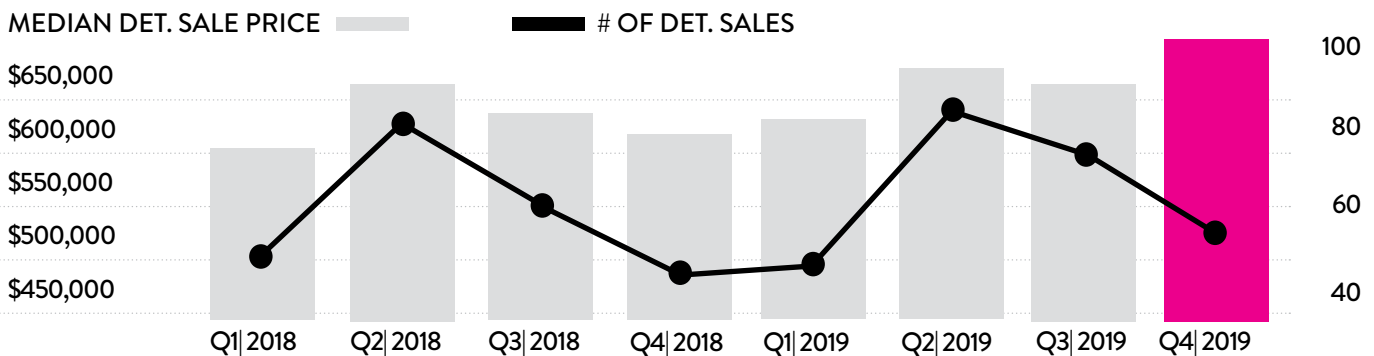
Q4 SALES BY INVENTORY TYPE



\$695,000
DETACHED MEDIAN SALE

\$472,000
TOWN/LINK MEDIAN SALE

\$330,000
APMNT/CONDO MEDIAN SALE



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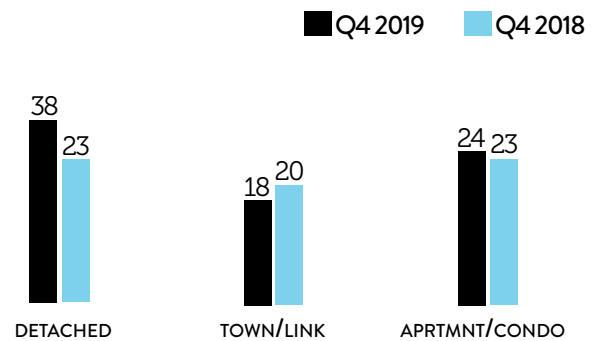
SOUTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$571,900	80	89	0.90	\$585,000
Q4 2018 TOTAL	\$500,000	66	79	0.84	\$471,500
% CHANGE (+/-)	14.4% ▲	21.2% ▲	12.6% ▲	7.1% ▲	24.1% ▲
Q3 2019 TOTAL	\$609,900	121	167	0.72	\$480,000
% CHANGE (+/-)	6.2% ▼	33.9% ▼	46.7% ▼	25% ▲	21.9% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	35	34	▲
TOWN/LINK HOMES	24	17	▼
APARTMENT/CONDO	30	28	▲
TOTAL	89	79	▲
SALES TO NEW RATIO	0.90	0.84	▲

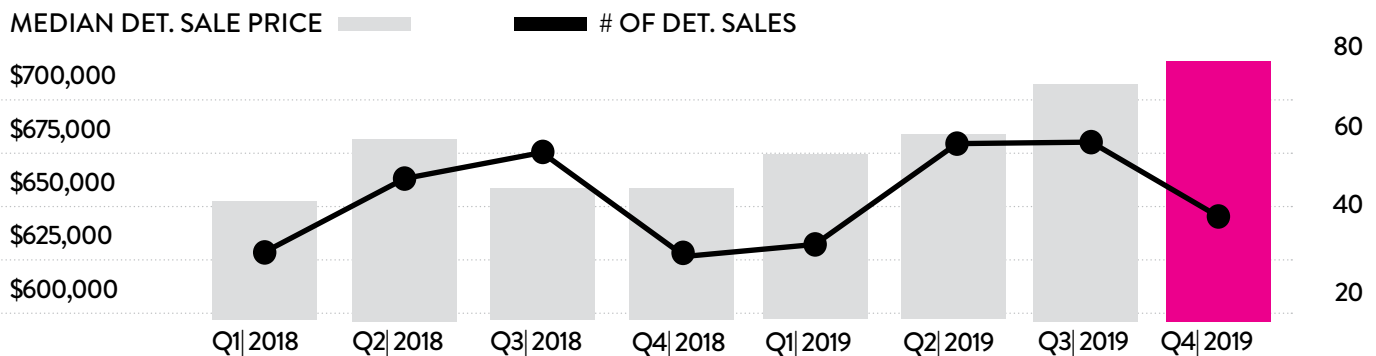
Q4 SALES BY INVENTORY TYPE



\$719,500
DETACHED MEDIAN SALE

\$513,750
TOWN/LINK MEDIAN SALE

\$364,400
APMNT/CONDO MEDIAN SALE



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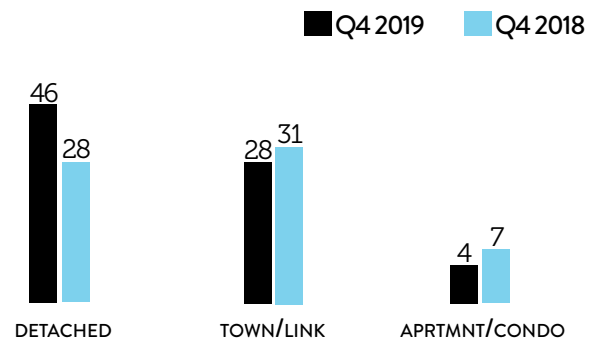
EAST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$524,000	78	72	1.08	\$520,000
Q4 2018 TOTAL	\$501,390	66	81	0.81	\$469,500
% CHANGE (+/-)	4.5% ▲	18.2% ▲	11.1% ▼	33.3% ▲	10.7% ▲
Q3 2019 TOTAL	\$542,400	108	144	0.75	\$513,000
% CHANGE (+/-)	3.4% ▼	27.8% ▼	50% ▼	44% ▲	1.4% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	43	39	▲
TOWN/LINK HOMES	23	33	▼
APARTMENT/CONDO	6	9	▼
TOTAL	72	81	▼
SALES TO NEW RATIO	1.08	0.81	▲

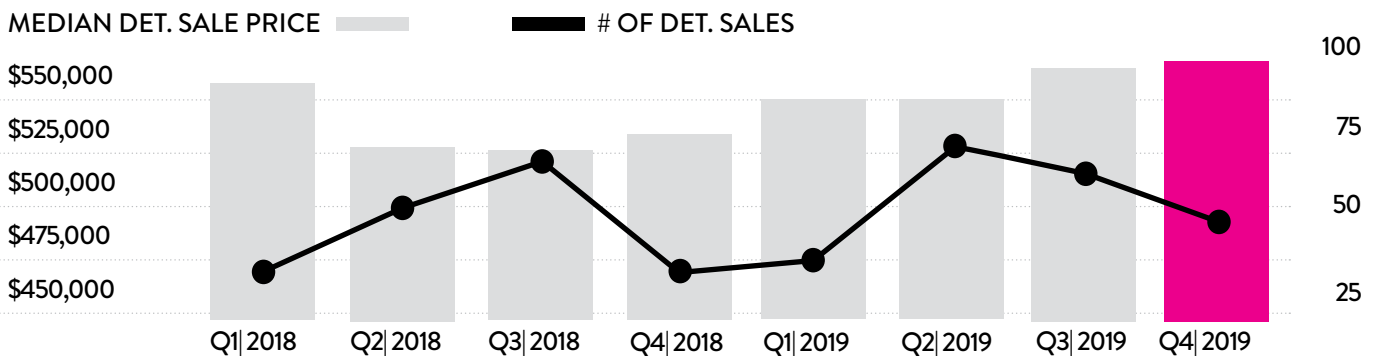
Q4 SALES BY INVENTORY TYPE



\$560,000
DETACHED MEDIAN SALE

\$481,950
TOWN/LINK MEDIAN SALE

\$326,500
APMNT/CONDO MEDIAN SALE



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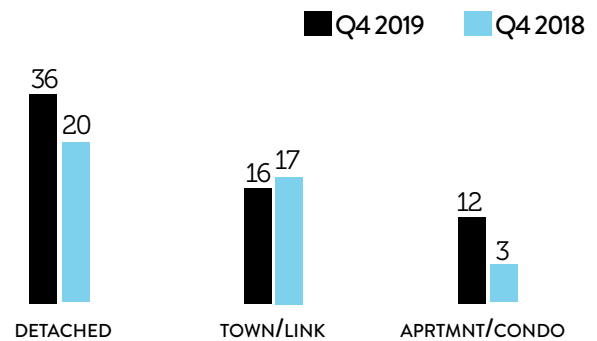
WEST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$499,900	64	58	1.10	\$495,500
Q4 2018 TOTAL	\$549,500	40	46	0.87	\$491,000
% CHANGE (+/-)	9% ▼	60% ▲	26.1% ▲	26.4% ▲	0.9% ▲
Q3 2019 TOTAL	\$509,900	89	111	0.80	\$500,000
% CHANGE (+/-)	2% ▼	28.1% ▼	47.7% ▼	37.5% ▲	0.9% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	31	29	▲
TOWN/LINK HOMES	15	14	▲
APARTMENT/CONDO	12	3	▲
TOTAL	58	46	▲
SALES TO NEW RATIO	1.10	0.87	▲

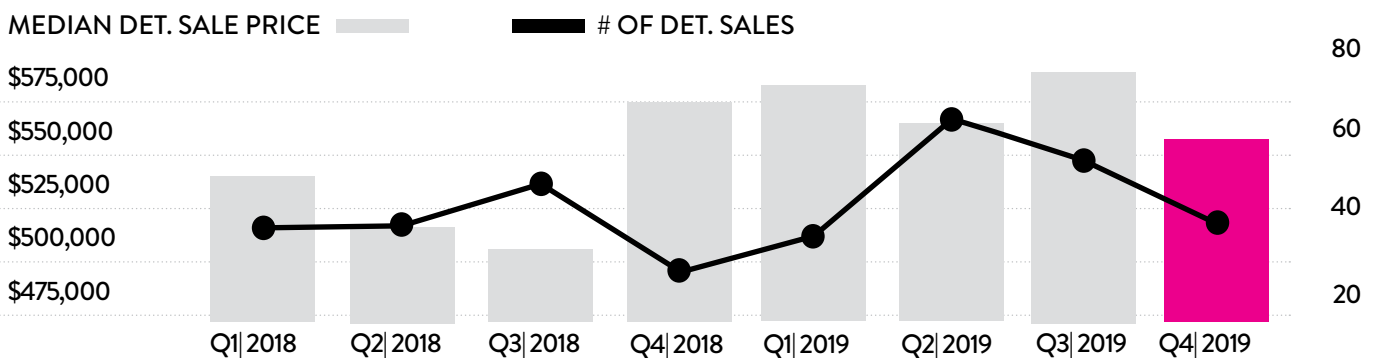
Q4 SALES BY INVENTORY TYPE



\$546,750
DETACHED MEDIAN SALE

\$412,500
TOWN/LINK MEDIAN SALE

\$286,500
APMNT/CONDO MEDIAN SALE



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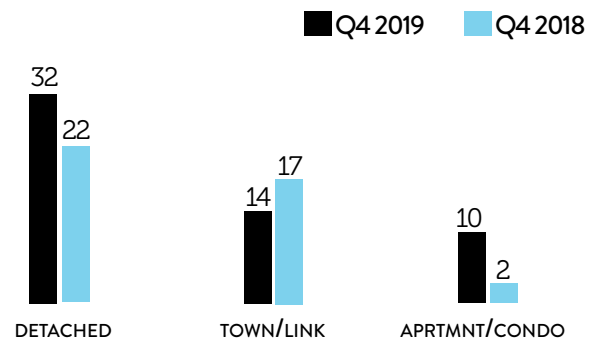
NORTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$504,950	56	46	1.22	\$508,000
Q4 2018 TOTAL	\$450,000	41	45	0.91	\$425,000
% CHANGE (+/-)	12.2% ▲	36.6% ▲	2.2% ▲	34.1% ▲	19.5% ▲
Q3 2019 TOTAL	\$509,900	63	102	0.62	\$505,000
% CHANGE (+/-)	0.97% ▼	11.1% ▼	54.9% ▼	96.8% ▲	0.6% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	26	25	▲
TOWN/LINK HOMES	12	13	▼
APARTMENT/CONDO	8	7	▲
TOTAL	46	45	▲
SALES TO NEW RATIO	1.22	0.91	▲

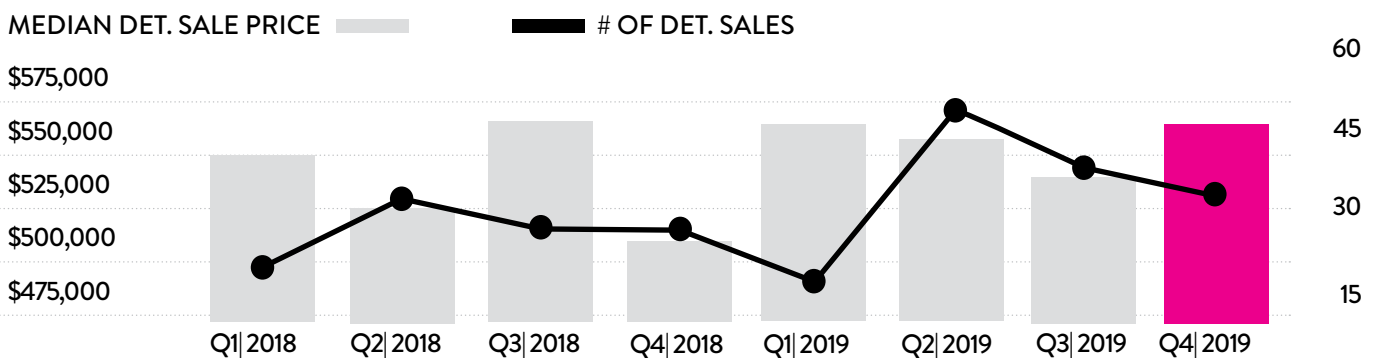
Q4 SALES BY INVENTORY TYPE



\$544,750
DETACHED MEDIAN SALE

\$442,500
TOWN/LINK MEDIAN SALE

\$352,500
APMNT/CONDO MEDIAN SALE



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4 2019

COMPLETE DATA

Cities of Kitchener + Waterloo



TRILLIUMWEST
QUARTERLY DATA REPORT

COMPLETE DATA

Cities of Kitchener + Waterloo

Q4 | SALES TO new listing ratio

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

0.96

INSIDE THE NUMBERS

Quite a quarter to complete quite a year.

The stories of 2019 real estate in KW will be told for years to come. The year was filled with the kind of stuff future Realtors, investors and home-owners will sit and listen to with awe. Lessons were learned, adjustments were made and in some areas even balance was found.

So what now? Does the market return to more predictable times or does the surge simply continue?

Well, while we see disparities across every area in the Region, Kitchener and Waterloo as a whole are witnessing substantial reductions in housing supply. With prices spiking significantly and less new homes brought to market, the supply of available listings dropped significantly down 23.4% from Q4 2019 and 21.8% from the same period in 2018.

Without a doubt, supply will tell the story in 2020.

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

	Q4 2019	% Chg (Y)	Q4 2018	% Chg (Q)	Q3 2019
MEDIAN DET. SALE PRICE	\$580,000	10.5% ▲	\$525,000	3.2% ▲	\$562,000
NUMBER OF NEW SALES	1081	6.1% ▼	1151	23.5% ▼	1413
MEDIAN DAYS ON MARKET	15	2 days ▼	17	1 day ▲	14
NEW INVENTORY	1124	23.4% ▼	1468	43.5% ▼	1991

UP & DOWN quick review

▲128%

Q/Q increase in the Downtown sales to new listing ratio. A super-spicy return in condo land.

▲18%

Y/Y increase in West Waterloo median sale price. Those famous price tags got even pricier in 2019.

▲6%

Q/Q increase in West Kitchener median sale price. That iconic 500k mark is surpassed. Big-time news.

▲7%

Q/Q increase in the Uptown median sale price. We don't see this number rolling back in Q1.

▼1%

Q/Q reduction in East Kitchener median sale price. That 500k threshold proved too scary to surpass.

▼38%

Y/Y reduction in East Waterloo new inventory. Facilitated by a reduction in detached listings. Again.

▼29%

Y/Y reduction in West Kitchener new inventory. Tighter supply, increased demand & a big price spike.

▼47%

Q/Q reduction in Downtown new inventory. Buyers got hungry & consumed all that was available.

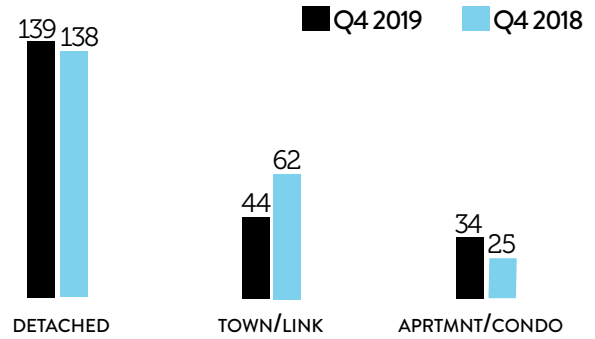
EAST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$499,900	217	267	0.81	\$488,000
Q4 2018 TOTAL	\$457,000	225	264	0.89	\$418,000
% CHANGE (+/-)	94% ▲	3.5% ▼	11% ▲	9% ▼	16.7% ▲
Q3 2019 TOTAL	\$500,000	265	357	0.74	\$495,000
% CHANGE (+/-)	0.02% ▼	18.1% ▼	25.2% ▼	9.4% ▲	1.4% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	166	174	▼
TOWN/LINK HOMES	51	66	▼
APARTMENT/CONDO	50	24	▲
TOTAL	267	264	▲
SALES TO NEW RATIO	0.81	0.89	▼

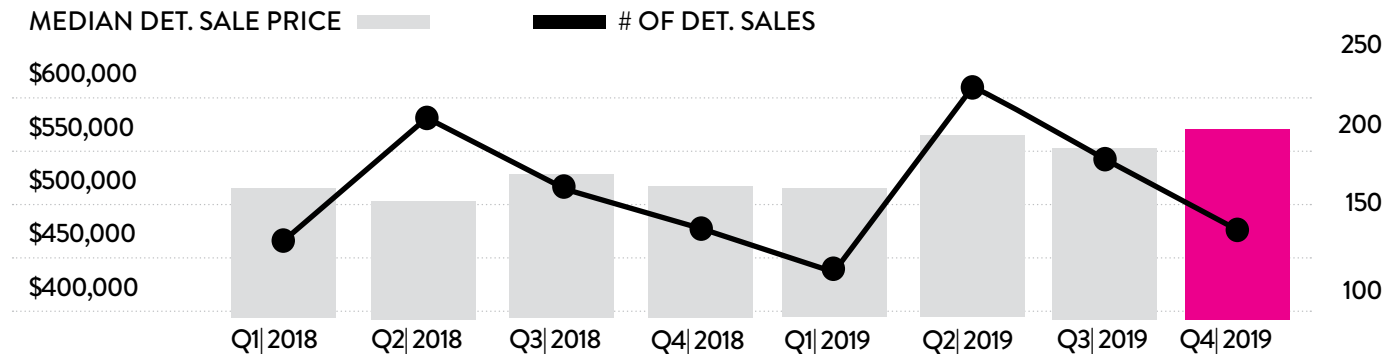
Q4 SALES BY INVENTORY TYPE



\$541,000
DETACHED MEDIAN SALE

\$424,950
TOWN/LINK MEDIAN SALE

\$291,500
APMNT/CONDO MEDIAN SALE



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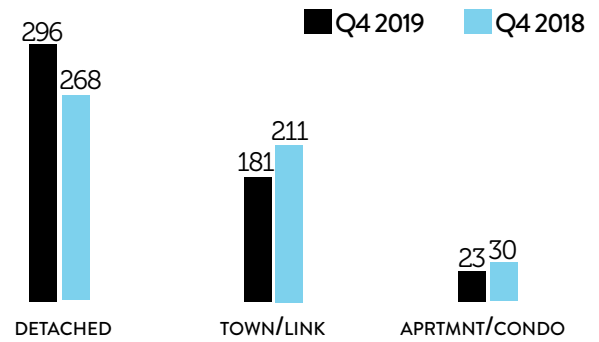
WEST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$499,900	500	464	1.08	\$504,550
Q4 2018 TOTAL	\$459,900	509	651	0.78	\$432,000
% CHANGE (+/-)	8.7% ▲	1.8% ▼	28.7% ▼	38.5% ▲	16.8% ▲
Q3 2019 TOTAL	\$499,900	681	958	0.71	\$475,000
% CHANGE (+/-)	=	26.6% ▼	51.6% ▼	52.1% ▲	6.2% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	292	369	▼
TOWN/LINK HOMES	138	240	▼
APARTMENT/CONDO	34	42	▼
TOTAL	464	651	▼
SALES TO NEW RATIO	1.08	0.78	▲

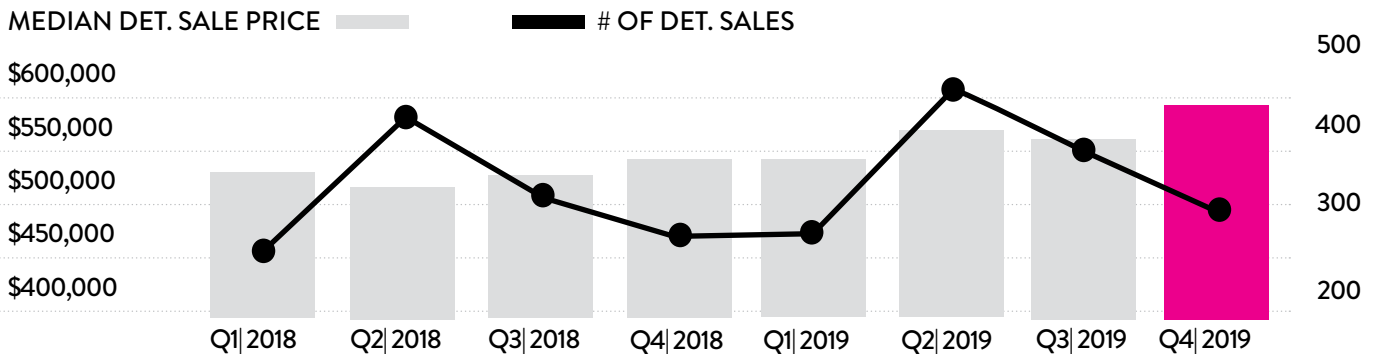
Q4 SALES BY INVENTORY TYPE



\$570,000
DETACHED MEDIAN SALE

\$435,000
TOWN/LINK MEDIAN SALE

\$342,500
APMNT/CONDO MEDIAN SALE



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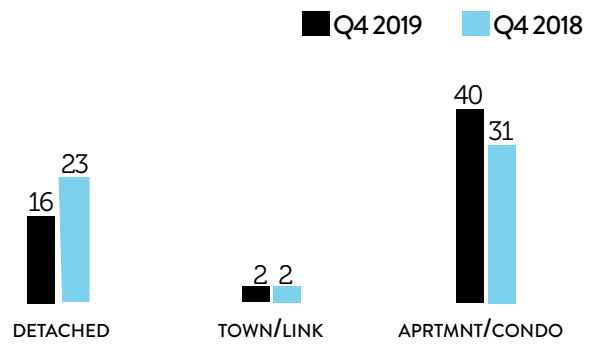
DOWNTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$399,000	58	47	1.23	\$377,500
Q4 2018 TOTAL	\$383,950	56	68	0.82	\$377,450
% CHANGE (+/-)	3.9% ▲	3.6% ▲	30.9% ▼	50% ▲	0.01% ▲
Q3 2019 TOTAL	\$380,000	48	88	0.54	\$352,750
% CHANGE (+/-)	5% ▲	20.8% ▲	46.6% ▼	127.8% ▲	7% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	17	29	▼
TOWN/LINK HOMES	1	4	▼
APARTMENT/CONDO	29	35	▼
TOTAL	47	68	▼
SALES TO NEW RATIO	1.23	0.82	▲

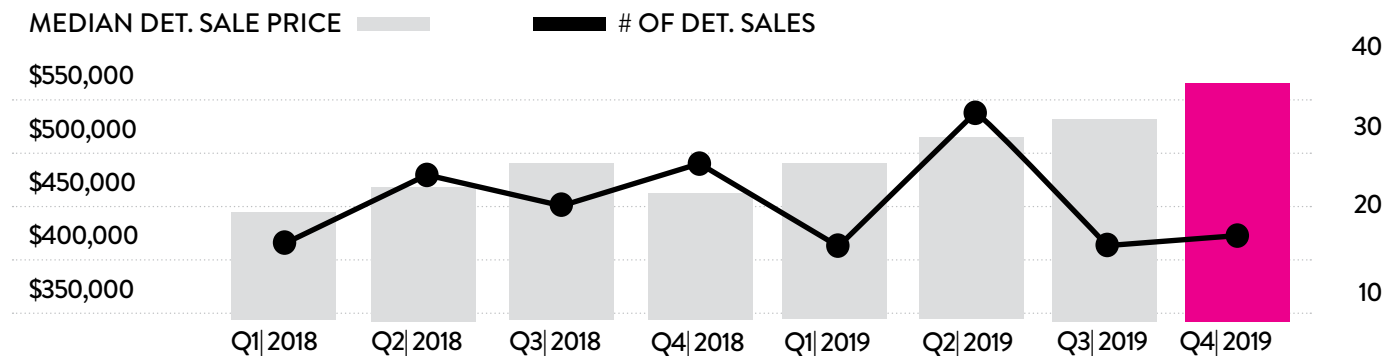
Q4 SALES BY INVENTORY TYPE



\$540,000
DETACHED MEDIAN SALE

\$507,968
TOWN/LINK MEDIAN SALE

\$355,000
APMNT/CONDO MEDIAN SALE



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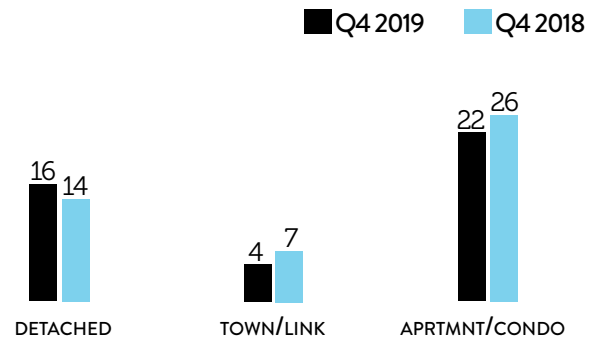
UPTOWN WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$489,900	42	62	0.68	\$486,250
Q4 2018 TOTAL	\$463,950	47	52	0.90	\$450,000
% CHANGE (+/-)	5.6% ▲	10.6% ▼	19.2% ▲	24.4% ▼	8% ▲
Q3 2019 TOTAL	\$524,900	55	62	0.89	\$453,000
% CHANGE (+/-)	6.7% ▼	23.6% ▼	=	23.6% ▼	7.3% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	19	18	▲
TOWN/LINK HOMES	11	7	▲
APARTMENT/CONDO	32	27	▲
TOTAL	62	52	▲
SALES TO NEW RATIO	0.68	0.90	▼

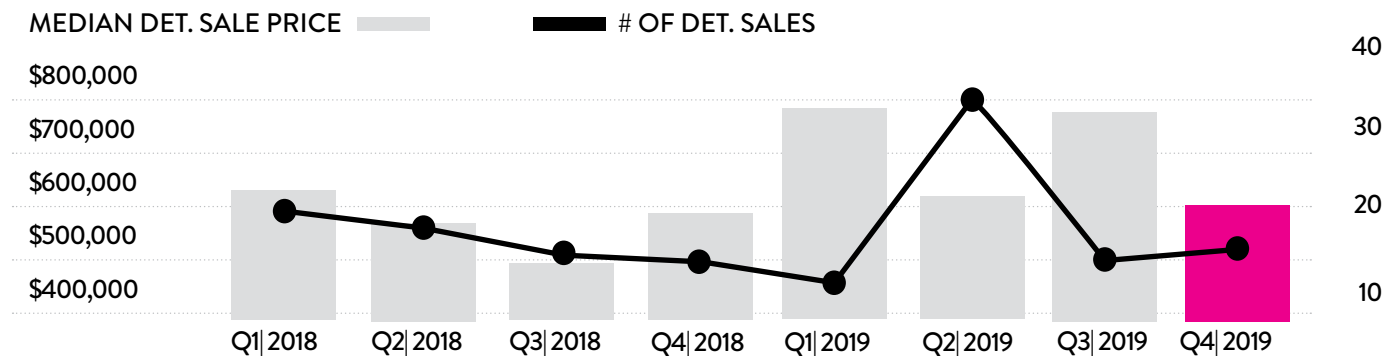
Q4 SALES BY INVENTORY TYPE



\$557,500
DETACHED MEDIAN SALE

\$453,700
TOWN/LINK MEDIAN SALE

\$417,500
APMNT/CONDO MEDIAN SALE



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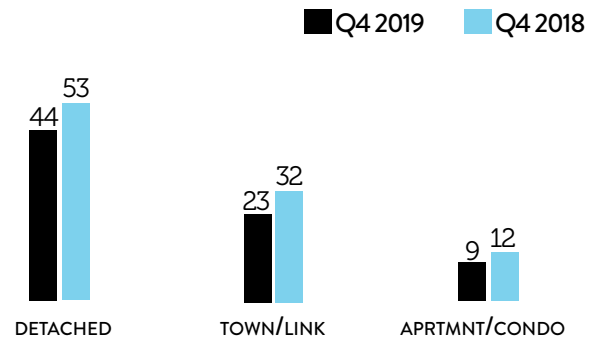
EAST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$500,000	76	79	0.96	\$525,500
Q4 2018 TOTAL	\$539,900	97	127	0.76	\$465,000
% CHANGE (+/-)	74% ▼	21.6% ▼	37.8% ▼	26.3% ▲	13% ▲
Q3 2019 TOTAL	\$599,900	107	162	0.66	\$530,000
% CHANGE (+/-)	16.6% ▼	29% ▼	51.2% ▼	45.4% ▲	0.85% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	46	76	▼
TOWN/LINK HOMES	23	30	▲
APARTMENT/CONDO	10	21	▼
TOTAL	79	127	▼
SALES TO NEW RATIO	0.96	0.76	▲

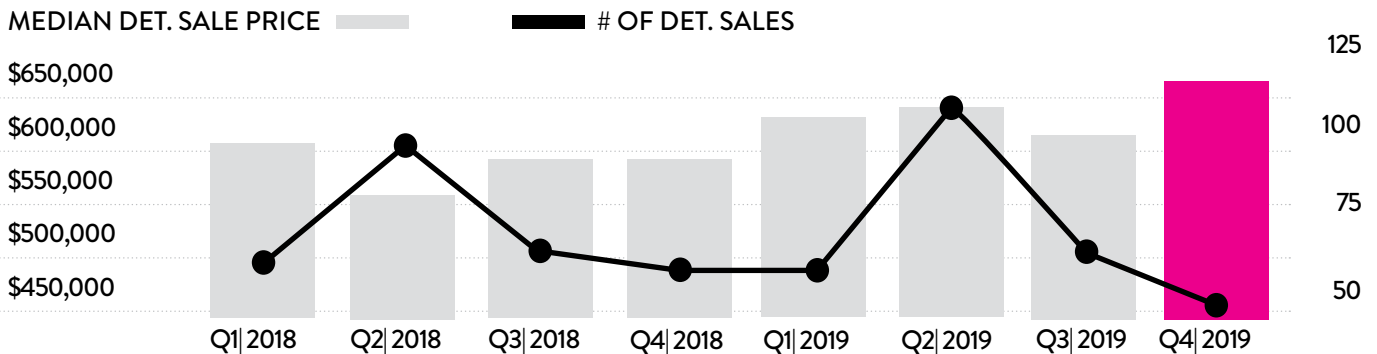
Q4 SALES BY INVENTORY TYPE



\$637,500
DETACHED MEDIAN SALE

\$399,900
TOWN/LINK MEDIAN SALE

\$325,000
APMNT/CONDO MEDIAN SALE



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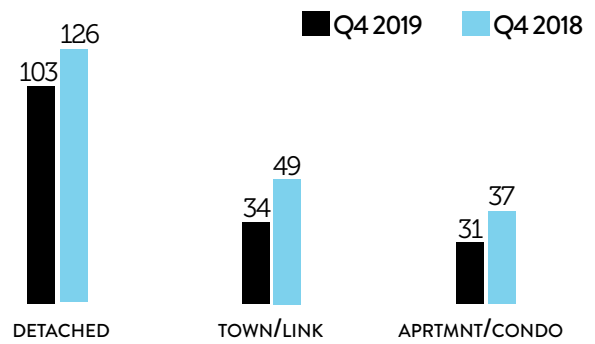
WEST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$506,000	168	186	0.90	\$575,000
Q4 2018 TOTAL	\$519,000	212	292	0.73	\$487,500
% CHANGE (+/-)	2.5% ▼	20.7% ▼	36.3% ▼	23.3% ▲	18% ▲
Q3 2019 TOTAL	\$599,900	251	354	0.71	\$560,000
% CHANGE (+/-)	15.6% ▼	33.1% ▼	47.4% ▼	26.8% ▲	2.7% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
DETACHED HOMES	97	175	▼
TOWN/LINK HOMES	31	56	▼
APARTMENT/CONDO	58	61	▼
TOTAL	186	292	▼
SALES TO NEW RATIO	0.90	0.73	▲

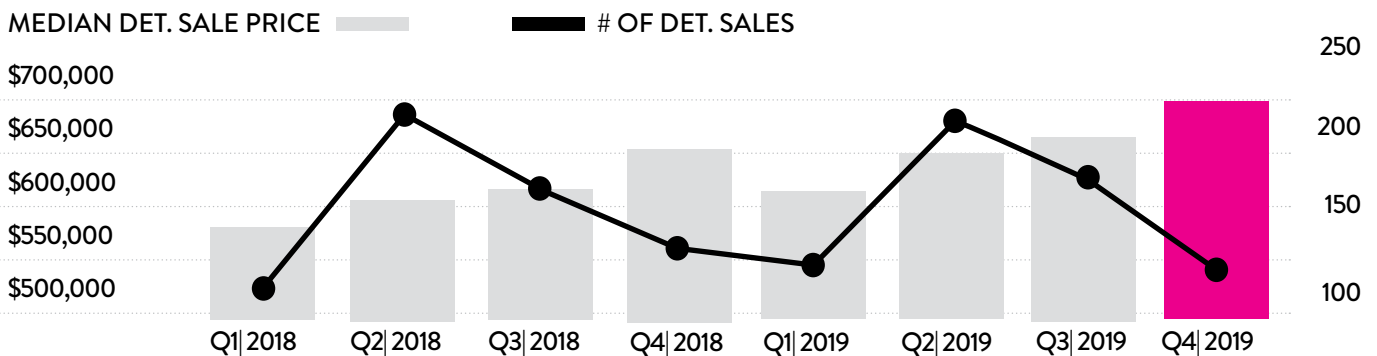
Q4 SALES BY INVENTORY TYPE



\$692,000
DETACHED MEDIAN SALE

\$495,000
TOWN/LINK MEDIAN SALE


\$332,000
APMNT/CONDO MEDIAN SALE



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TW



4 2019

COMPLETE DATA

The Townships



ELORA
MILL
INN

COMPLETE DATA

The Townships

INSIDE THE NUMBERS

You can leave the city, but you can't leave the busy markets behind.

Q4 put a pretty bow on an epic year in the surrounding Townships of the Region. The days of finding hidden country gems for a little more breathing room in your backyard and also inside your mortgage, appear to be numbered. The Townships were almost as busy as anywhere else across the region for all of 2019.

Several of the Townships have wisely begun to entice families of all ages away from the busier urban streets. Plenty of 'large lot' subdivisions and an array of intelligent housing options has been too tempting to ignore for a steady stream of purchasers. And we don't see this changing in 2020.

As supply streams tighten throughout the cities, new opportunities to build that idyllic family home are on;y increasing in the Townships. 2020 should see both the pace of development and Buyer intrigue continue, if not increase.

Q4 | SALES TO

new listing ratio

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

0.81

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

	Q4 2019	% Chg (Y)	Q4 2018	% Chg (Q)	Q3 2019
MEDIAN DET. SALE PRICE	\$652,000	10.5% ▲	\$590,000	0.43% ▼	\$654,800
NUMBER OF NEW SALES	321	22.5% ▲	262	24.5% ▼	425
MEDIAN DAYS ON MARKET	24	2 days ▼	26	1 day ▲	23
NEW INVENTORY	396	19.3% ▲	332	42.2% ▼	685

UP & DOWN quick review

▲ 31%

Y/Y increase in the Wilmot median sale price. Q4 wrapped a full year of hot, hot, hot in Wilmot.

▼ 54%

Q/Q decrease in Centre Wellington new inventory. The ratio jumped, but prices held firm. Interesting.

▲ 73%

Y/Y jump in the Guelph Eramosa sales to new listing ratio. Volume, supply & prices all saw big gains.

▼ 17%

Y/Y drop in the Puslinch median sale price. Small sample size, but Seller expectations did not adjust.

▲ 17%

Y/Y increase in the North Dumfries median list price. Seller confidence grew by almost 100k in one year.

▼ 8%

Q/Q decrease in the Guelph Eramosa median list price. Sellers adjusted & they got rewarded.

▲ 47%

Y/Y spike in Woolwich new inventory. Smartly taking advantage of supply shortages in the city.

▼ 8%

Q/Q reduction in the Wellesley median sale price. A noticeable adjustment to finish the year.

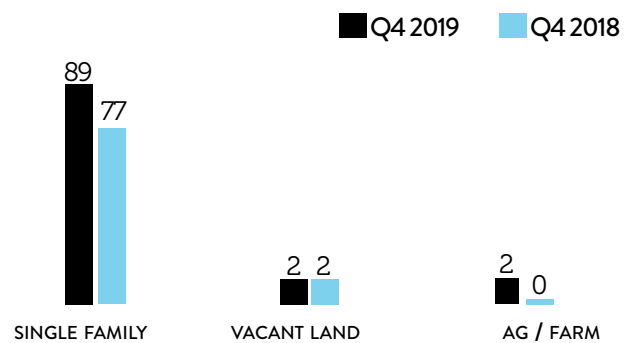
CENTRE WELLINGTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$649,900	93	92	1.01	\$555,000
Q4 2018 TOTAL	\$525,000	79	93	0.85	\$493,000
% CHANGE (+/-)	23.8% ▲	9.2% ▲	1.1% ▼	18.8% ▲	12.6% ▲
Q3 2019 TOTAL	\$599,000	131	198	0.66	\$555,000
% CHANGE (+/-)	8.5% ▲	29% ▼	53.5% ▼	53% ▲	=

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	89	85	▲
VACANT LAND	2	2	=
AG / FARM	1	6	▼
TOTAL	92	93	▼
SALES TO NEW RATIO	1.01	0.85	▲

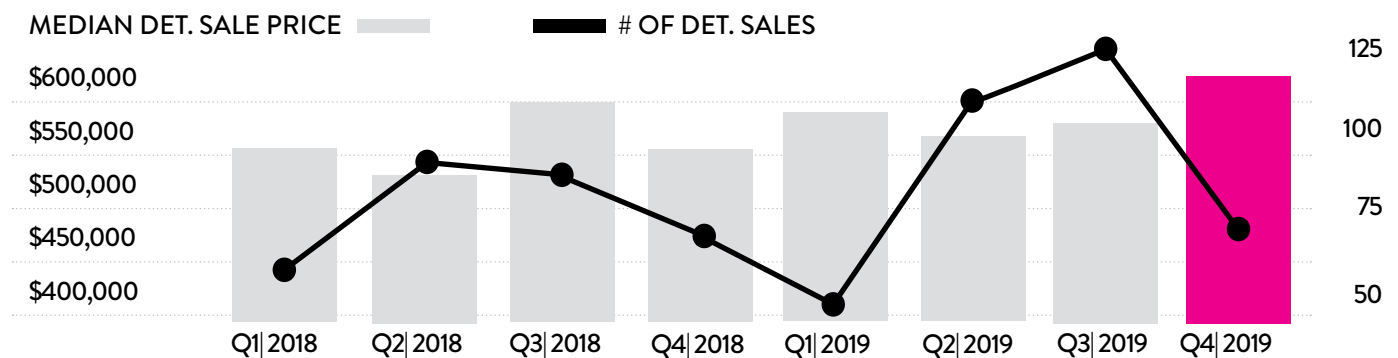
Q4 SALES BY INVENTORY TYPE



\$555,000
SINGLE FAMILY MEDIAN

\$292,400
VACANT LAND MEDIAN

\$1,099,500
AG / FARM MEDIAN



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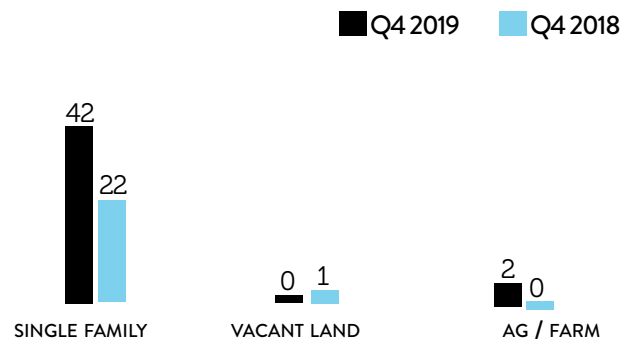
GUELPH ERAMOSA

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$744,900	44	50	0.88	\$780,000
Q4 2018 TOTAL	\$750,000	23	45	0.51	\$680,000
% CHANGE (+/-)	0.68% ▼	91.3% ▲	11.1% ▲	72.5% ▲	14.7% ▲
Q3 2019 TOTAL	\$809,950	48	90	0.53	\$738,950
% CHANGE (+/-)	8% ▼	8.3% ▼	44.4% ▼	66% ▲	5.5% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	43	34	▲
VACANT LAND	5	6	▼
AG / FARM	2	5	▼
TOTAL	50	45	▲
SALES TO NEW RATIO	0.88	0.51	▲

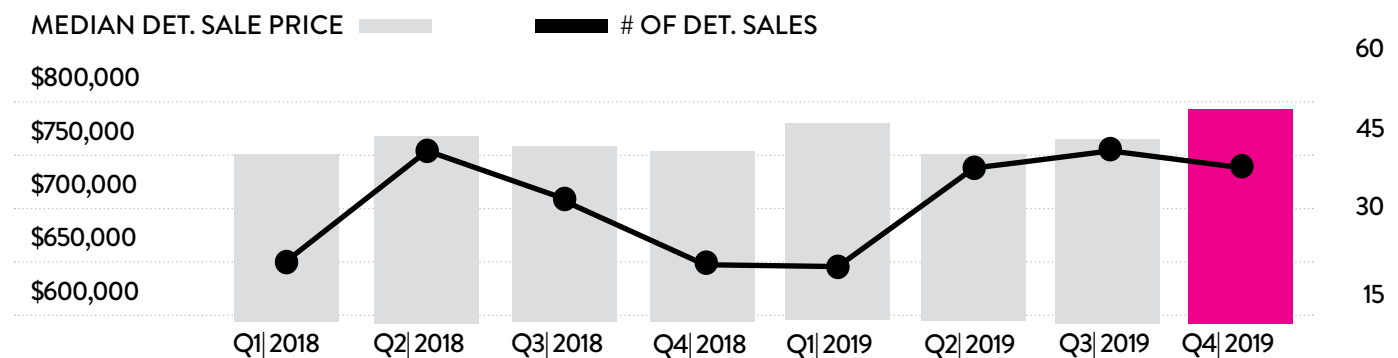
Q4 SALES BY INVENTORY TYPE



\$770,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$1,807,500
AG / FARM MEDIAN



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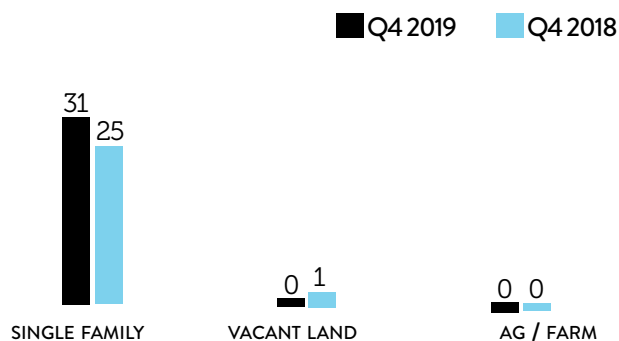
NORTH DUMFRIES

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$659,900	31	45	0.69	\$609,900
Q4 2018 TOTAL	\$564,900	26	37	0.70	\$575,000
% CHANGE (+/-)	16.8% ▲	19.2% ▲	21.6% ▲	14% ▼	6.1% ▲
Q3 2019 TOTAL	\$649,900	49	66	0.74	\$550,000
% CHANGE (+/-)	1.5% ▲	36.7% ▼	31.8% ▼	6.7% ▼	10.9% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	38	35	▲
VACANT LAND	6	2	▲
AG / FARM	1	0	▲
TOTAL	45	37	▲
SALES TO NEW RATIO	0.69	0.70	▼

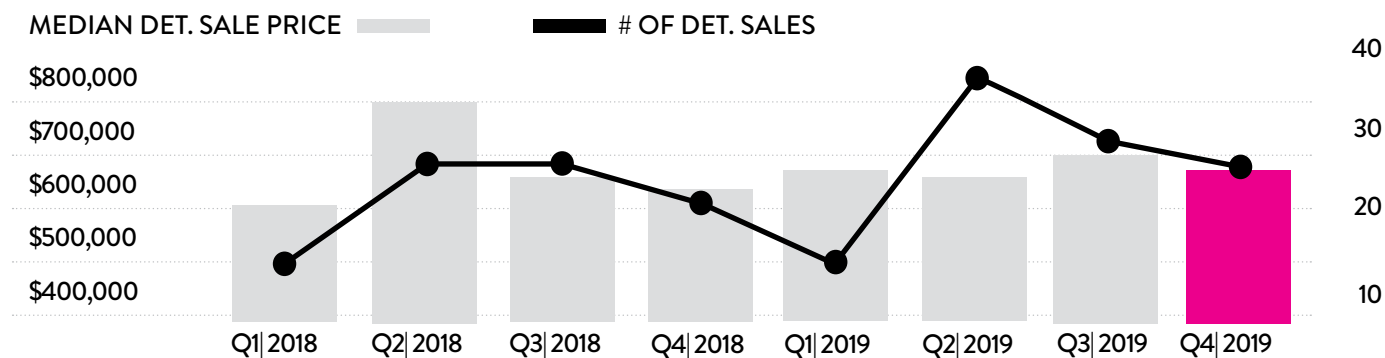
Q4 SALES BY INVENTORY TYPE



\$609,900
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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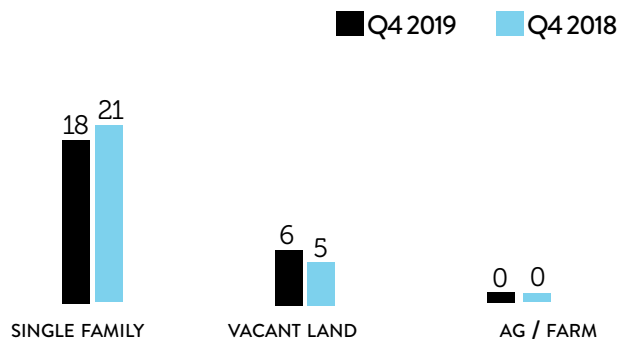
TOWNSHIP OF PUSLINCH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$1,350,000	24	49	0.49	\$755,000
Q4 2018 TOTAL	\$1,149,900	26	42	0.62	\$905,000
% CHANGE (+/-)	174% ▲	77% ▼	16.7% ▲	21% ▼	16.6% ▼
Q3 2019 TOTAL	\$1,174,950	30	72	0.42	\$950,000
% CHANGE (+/-)	14.9% ▲	20% ▼	31.9% ▼	16.7% ▲	20.5% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	39	30	▲
VACANT LAND	7	11	▼
AG / FARM	3	1	▲
TOTAL	49	42	▲
SALES TO NEW RATIO	0.49	0.62	▼

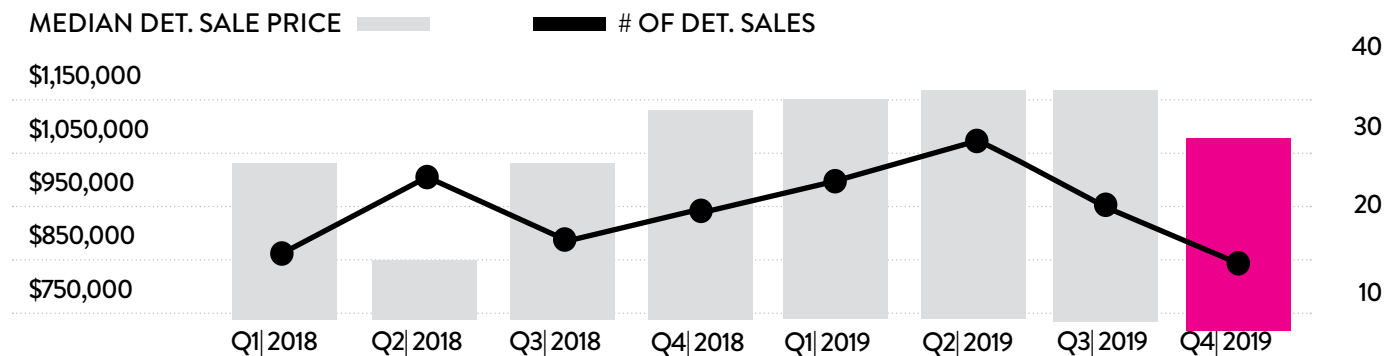
Q4 SALES BY INVENTORY TYPE



\$800,000
SINGLE FAMILY MEDIAN

\$523,500
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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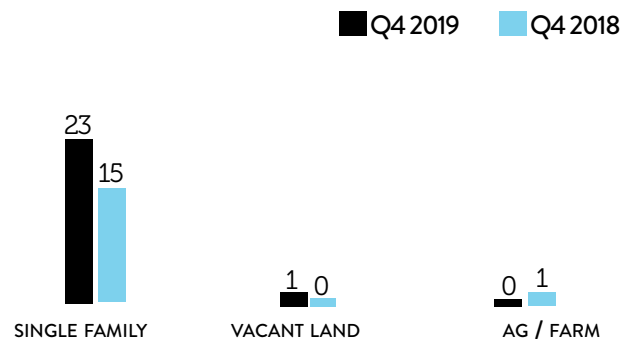
TOWNSHIP OF WELLESLEY

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$719,000	24	27	0.89	\$631,000
Q4 2018 TOTAL	\$725,000	16	25	0.64	\$600,000
% CHANGE (+/-)	0.83% ▼	50% ▲	8% ▲	39.1% ▲	5.2% ▲
Q3 2019 TOTAL	\$685,000	22	41	0.54	\$683,500
% CHANGE (+/-)	5% ▲	9.1% ▲	34.1% ▼	64.8% ▲	7.7% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	27	22	▲
VACANT LAND	0	2	▼
AG / FARM	0	1	▼
TOTAL	27	25	▲
SALES TO NEW RATIO	0.89	0.64	▲

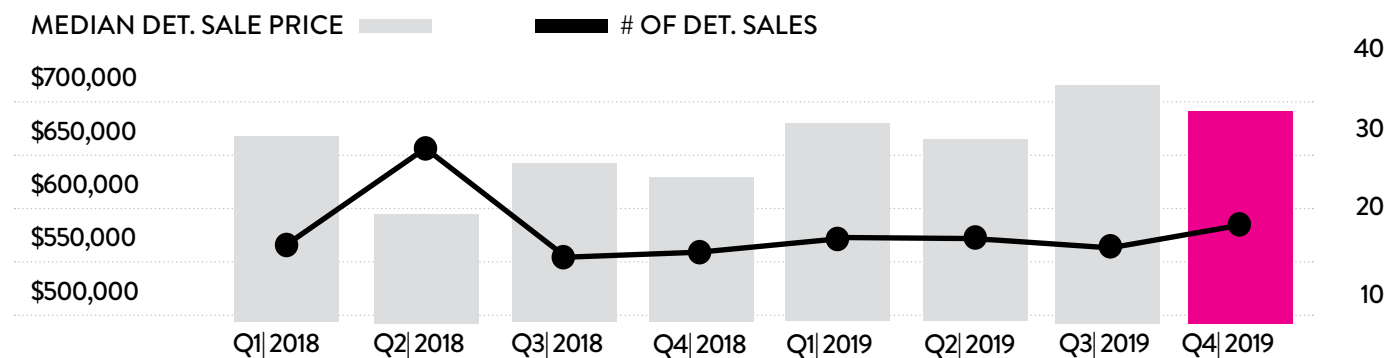
Q4 SALES BY INVENTORY TYPE



\$634,000
SINGLE FAMILY MEDIAN

\$179,900
VACANT LAND MEDIAN

N/A
AG / FARM MEDIAN



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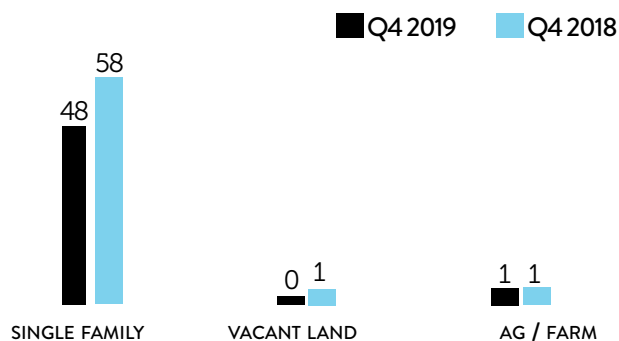
TOWNSHIP OF WILMOT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$649,900	49	52	0.94	\$597,500
Q4 2018 TOTAL	\$548,750	60	74	0.81	\$455,200
% CHANGE (+/-)	18.4% ▲	18.3% ▼	29.7% ▼	16% ▲	31.3% ▲
Q3 2019 TOTAL	\$648,250	77	110	0.70	\$598,000
% CHANGE (+/-)	0.25% ▲	36.4% ▼	52.7% ▼	34.3% ▲	0.08% ▼

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	48	72	▼
VACANT LAND	1	1	=
AG / FARM	3	1	▲
TOTAL	52	74	▼
SALES TO NEW RATIO	0.94	0.81	▲

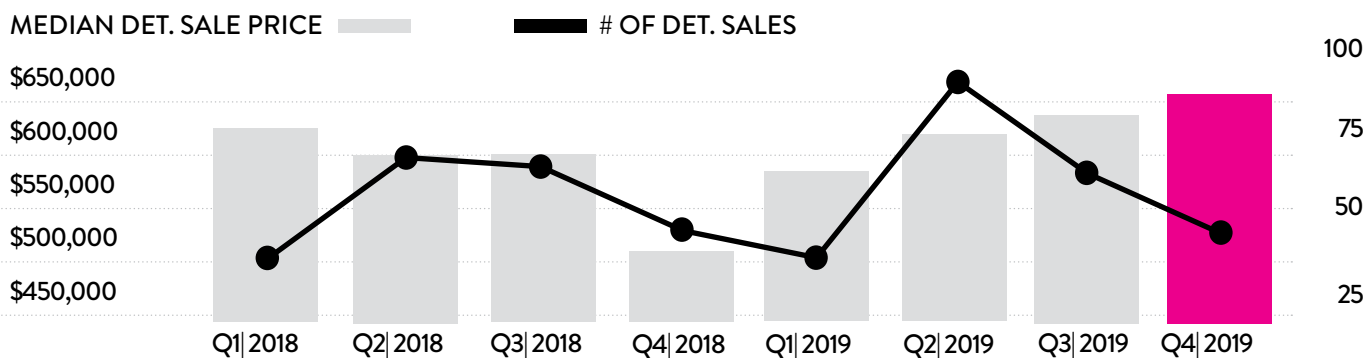
Q4 SALES BY INVENTORY TYPE



\$596,480
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$910,000
AG / FARM MEDIAN



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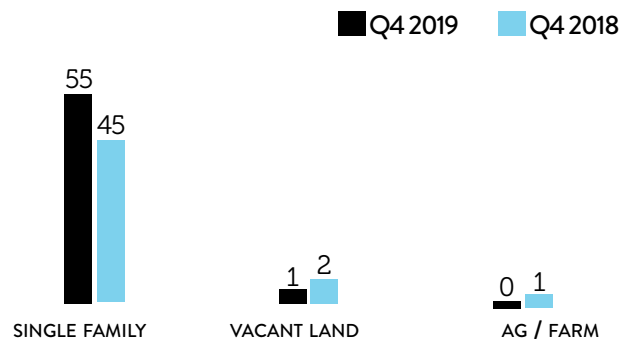
TOWNSHIP OF WOOLWICH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES/NEW RATIO	MEDIAN SALE PRICE
Q4 2019 TOTAL	\$679,900	56	81	0.69	\$575,000
Q4 2018 TOTAL	\$570,000	48	55	0.87	\$510,000
% CHANGE (+/-)	19.3% ▲	16.7% ▲	47.3% ▲	20.7% ▼	12.7% ▲
Q3 2019 TOTAL	\$699,000	68	108	0.63	\$525,000
% CHANGE (+/-)	2.7% ▼	17.6% ▼	25% ▼	9.5% ▲	9.5% ▲

Q4 NEW INVENTORY

	Q4 2019	Q4 2018	TREND
SINGLE FAMILY	73	54	▲
VACANT LAND	4	1	▲
AG / FARM	4	0	▲
TOTAL	81	55	▲
SALES TO NEW RATIO	0.69	0.87	▼

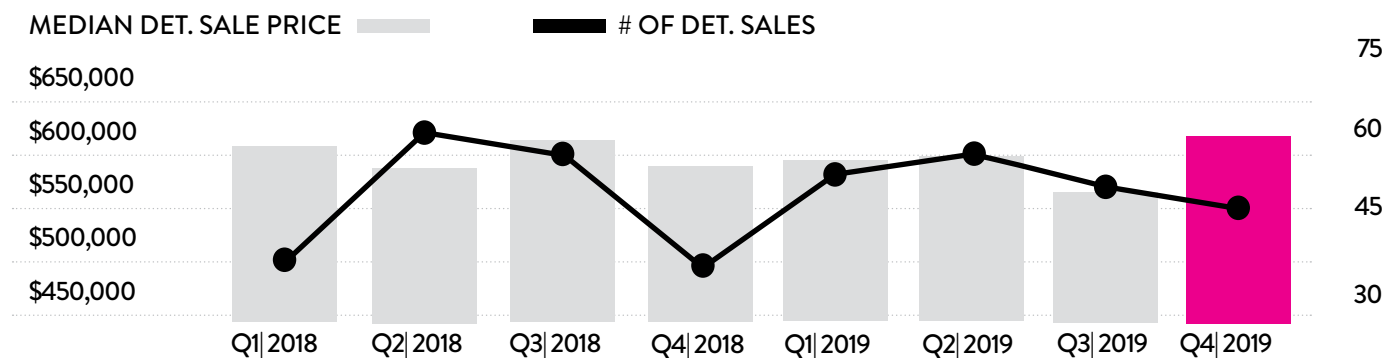
Q4 SALES BY INVENTORY TYPE



\$575,000
SINGLE FAMILY MEDIAN

\$820,000
VACANT LAND MEDIAN

N/A
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.

Leading REAL ESTATE
COMPANIES
OF THE WORLD™

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

