

ALL NEW RECORDS

COMPREHENSIVE GUELPH DATA & ANALYSIS
TRILLIUMWEST REAL ESTATE BROKERAGE



COMPLETE DATA | CITY OF GUELPH

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

Inside the Numbers

More listings & more sales

The 22.1% year over year (Y/Y) increase in inventory did little to slow down record-breaking sales figures. The 739 new sales in the quarter even surpassed the incredible Q2 of 2014 by 7.7%.

Nice knowing you

The median days on market was down modestly by 3 days (Y/Y) and on par (Q/Q). With seemingly endless multiple offer situations, this number was no surprise to those on the ground floor of Guelph real estate.

Turning up the heat

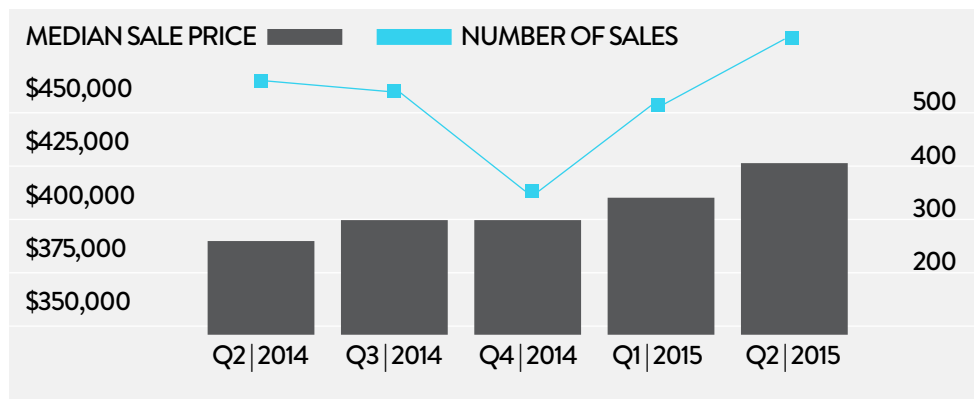
Although down from a huge 0.8 Sales to New Listing Ratio in Q2 of 2014, the 0.72 figure achieved in Q2 2015 is not to be discounted. The scorching markets in the North and the West ends have helped propel the overall ratio to well above red hot levels..

	Q2 2015	% Chg (Y)	Q2 2014	% Chg (Q)	Q1 2015
Median Det. Sale Price	\$413,000	10.4% ▲	\$374,000	7.3% ▲	\$385,000
Number of New Sales	739	7.7% ▲	686	46.9% ▲	503
Median Days on Market	15	3 days ▼	18	=	15
New Inventory	1034	22.1% ▲	847	32.7% ▲	779

0.72

Q2 | Sales to New Listing Ratio

This important indicator is up significantly Q/Q as the market stayed tilted towards sellers in Q2 2015.



Q2 | 2015 UP & DOWN QUICK REVIEW

- ▲24%** Q/Q increase in median sale price in Downtown Guelph. The competition continues to stay strong.
- ▲40%** YYY increase in inventory in South Guelph. As supply increases look for sales to match.
- ▲25%** Y/Y increase in sales volume in East Guelph. Any balance in the East doesn't appear to be on the horizon.
- ▲43%** Y/Y increase in sales volume in North Guelph. The hottest area in the city shows no signs of slowing down.

- ▼34%** Y/Y decrease in inventory in West Guelph. It has been over a year since supply was elevated in the West end.
- ▼43%** Q/Q decrease in inventory in West Guelph. As supply continued to decrease, demand went through the roof.
- ▼4.3%** Y/Y decrease in sales volume in South Guelph. A sign for concern South of the river?
- ▼31%** Y/Y decrease in the South Guelph sales/new listing ratio. It's beginning to balance out South of the river.



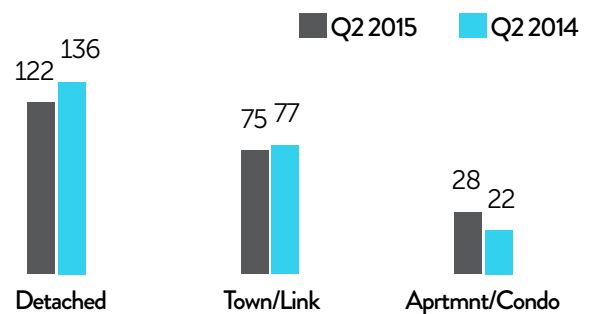
SOUTH GUELPH

	Median List Price	Number of Sales	New Inventory	Sales/New Ratio	Median Sale Price
Q2 2015 Total	\$399,900	225	394	0.57	\$395,000
Q2 2014 Total	\$424,950	235	282	0.83	\$380,000
% Change (+/-)	5.9% ▼	4.3% ▼	39.7% ▲	31.3% ▼	3.9% ▲
Q1 2015 Total	\$349,900	193	297	0.65	\$363,450
% Change (+/-)	14.3% ▲	16.6% ▲	32.7% ▲	12.3% ▼	8.7% ▲

Q2 | NEW INVENTORY

	Q2 2015	Q2 2014	TREND
Detached Homes	209	170	▲
Town/Link Homes	131	91	▲
Apartment/Condo	54	21	▲
Total	394	282	▲
Sales to New Ratio	0.57	0.65	▼

Q2 | SALES BY INVENTORY TYPE



\$465,000

DETACHED MEDIAN SALE

\$318,000

TOWN/LINK MEDIAN SALE

\$237,500

APRTMNT/CONDO MEDIAN SALE

SOUTH GUELPH REVIEW

Sale prices are up, but some shifting numbers of concern.

The South end of town finally seems to be settling into a more balanced market. The Sales to New Listing Ratio continued it's downward trend, this time settling below the 0.6 threshold for the first time in many quarters. In fact, the same ratio in the apartment/condo market is half of what it was only a year ago, creating some cause for concern with over supply. Overall, a healthy quarter for the south-side as Median Sale Prices continue to rise Y/Y (3.9%) and Q/Q (8.7%).

Neighbourhoods of South Guelph - Kortright Hills, The Village By The Arboretum, Campus Estates, Preservation Park, Rickson Ridge, Kortright Hills, Clairfields, Pine Ridge/Westminster Woods, Rolling Hills Estates, Priory Park, Old University, Municipal Park.

Visit TrilliumWest.com/neighbourhoods for a video vignette of South Guelph and individual neighbourhood profiles.

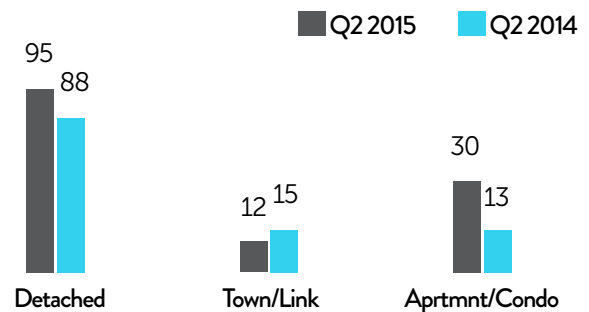
DOWNTOWN GUELPH

	Median List Price	Number of Sales	New Inventory	Sales/New Ratio	Median Sale Price
Q2 2015 Total	\$369,900	139	182	0.76	\$360,000
Q2 2014 Total	\$329,900	122	155	0.79	\$317,750
% Change (+/-)	12.1% ▲	13.9% ▲	17.4% ▲	3.8% ▼	13.3% ▲
Q1 2015 Total	\$309,900	92	136	0.68	\$289,950
% Change (+/-)	19.4% ▲	51.1% ▲	33.8% ▲	11.8% ▲	24.2% ▲

Q2 | NEW INVENTORY

	Q2 2015	Q2 2014	TREND
Detached Homes	128	118	▲
Town/Link Homes	17	16	▲
Apartment/Condo	37	21	▲
Total	182	155	▲
Sales to New Ratio	0.76	0.68	▲

Q2 | SALES BY INVENTORY TYPE



\$375,000

DETACHED MEDIAN SALE

\$297,500

TOWN/LINK MEDIAN SALE

\$297,000

APRTMNT/CONDO MEDIAN SALE

DOWNTOWN GUELPH REVIEW

A big rebound quarter in the city core.

The Median Sale Price corrected itself massively in Q2 when compared with both Y/Y (13.3%) and especially Q/Q (24.2%). Detached homes continued to be a very hot commodity and achieved a new record for Median Sale Price in the quarter. Attached listings fared equally as well, with both supply and consumption numbers attaining high levels. The impact of new downtown condo projects like [The Metalworks](#) is directly reflected in the 230% increase in apartment/condo sales.

The Sales to New Listing Ratio stays high with a positive outlook into Q3 for the downtown core.

Neighbourhoods of Downtown Guelph - The Ward, St. Georges Park, St. Patrick, Orchard Estates, Guelph General, Exhibition Park, Downtown Guelph, Howitt Creek.

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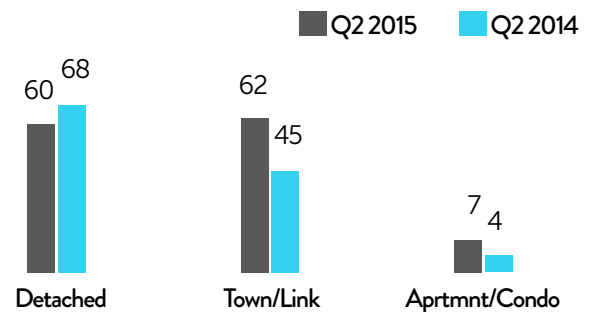
EAST GUELPH

	Median List Price	Number of Sales	New Inventory	Sales/New Ratio	Median Sale Price
Q2 2015 Total	\$334,900	130	155	0.84	\$329,900
Q2 2014 Total	\$323,714	118	144	0.82	\$309,900
% Change (+/-)	3.5% ▲	10.2% ▲	7.6% ▲	2.4% ▲	6.5% ▲
Q1 2015 Total	\$333,640	104	137	0.76	\$330,000
% Change	=	25% ▲	13.1% ▲	10.5% ▲	=

Q2 | NEW INVENTORY

	Q2 2015	Q2 2014	TREND
Detached Homes	82	92	▼
Town/Link Homes	66	47	▲
Apartment/Condo	6	5	▲
Total	155	144	▲
Sales to New Ratio	0.84	0.82	▲

Q2 | SALES BY INVENTORY TYPE



\$379,900

DETACHED MEDIAN SALE

\$320,500

TOWN/LINK MEDIAN SALE

\$208,500

APRTMNT/CONDO MEDIAN SALE

EAST GUELPH REVIEW

The insatiable consumption continues on the East-side.

The trend for many quarters in the East has been if you list it, it will sell. Q2 was certainly no exception to that rule, with the sales to new listing ratio escalating both Q/Q (10.5%) and Y/Y (2.4%). The drastic increases in supply (Y/Y 13.1% & Q/Q 7.6%), did little to effect both demand and Median Sale Prices, as it was green arrows across the board in East Guelph for the quarter.

Median Sale Prices on all housing types reached new heights as did the Y/Y combined median at \$329,900, an increase of 6.5% Y/Y. It would appear that the climb will continue, with no apparent cause for concern in the East Guelph data.

Neighbourhoods of East Guelph - Brant, Grange Hill, Holy Rosary, St. Patrick

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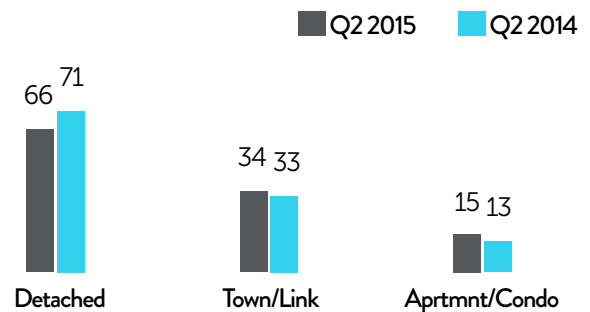
WESTGUELPH

	Median List Price	Number of Sales	New Inventory	Sales/New Ratio	Median Sale Price
Q2 2015 Total	\$325,000	116	91	1.27	\$330,000
Q2 2014 Total	\$329,900	117	137	0.85	\$327,850
% Change	1.5% ▼	0.1% ▼	33.6% ▼	49.4% ▲	1% ▲
Q1 2015 Total	\$334,900	88	159	0.55	\$283,000
% Change	3% ▼	31.8% ▲	42.8% ▼	230% ▲	16.6% ▲

Q2 | NEW INVENTORY

	Q2 2015	Q2 2014	TREND
Detached Homes	49	82	▼
Town/Link Homes	32	38	▼
Apartment/Condo	10	17	▼
Total	91	137	▼
Sales to New Ratio	1.27	0.85	▲

Q2 | SALES BY INVENTORY TYPE



\$380,250

DETACHED MEDIAN SALE

\$220,950

TOWN/LINK MEDIAN SALE

\$164,000

APRTMNT/CONDO MEDIAN SALE

WEST GUELPH REVIEW

There is only one big problem on the West side - Supply!

One of the strangest quarters in recent memory occurred in Q2 in West Guelph. Q1 2015 saw the Sales/New Ratio fall to an unusually balanced level at 0.55, however Q2 quickly dismissed that trend. An absolutely scorching Sale to New Listing Ratio of 1.27 emptied the market from any excess Q1 supply. A 31.8% increase in Sales Volume from Q1 did not go unnoticed, neither did a 16.6% increase in Median Sale Price.

Focusing on the Y/Y numbers is likely best when analyzing the West Guelph data for Q2. The big reduction in Y/Y supply is going to be a problem for future West Guelph home buyers if that number doesn't improve in upcoming quarters.

Neighbourhoods of West Guelph - Willow, Imperial South, Margaret Green, and West Guelph.

Visit TrilliumWest.com/neighbourhoods for a video vignette of West Guelph and individual neighbourhood profiles.

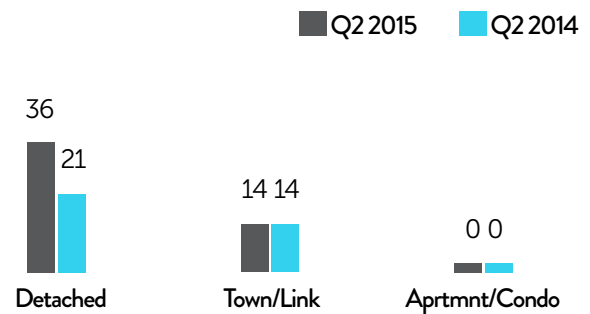
NORTH GUELPH

	Median List Price	Number of Sales	New Inventory	Sales/New Ratio	Median Sale Price
Q2 2015 Total	\$359,000	50	63	0.79	\$344,500
Q2 2014 Total	\$329,400	35	58	0.6	\$318,000
% Change	9% ▲	42.9% ▲	8.6% ▲	13.2% ▲	8.3% ▲
Q1 2015 Total	\$341,200	25	50	0.5	\$321,800
% Change	5.2% ▲	200% ▲	26% ▲	58% ▲	7.1% ▲

Q2 | NEW INVENTORY

	Q2 2015	Q2 2014	TREND
Detached Homes	45	42	▲
Town/Link Homes	18	16	▲
Apartment/Condo	0	0	=
Total	63	58	▲
Sales to New Ratio	0.79	0.5	▲

Q2 | SALES BY INVENTORY TYPE



\$367,500
DETACHED MEDIAN SALE

\$247,450
TOWN/LINK MEDIAN SALE

\$0
APRTMNT/CONDO MEDIAN SALE

NORTH GUELPH REVIEW

Nothing but green numbers across the board.

The continued success of the North Guelph market is showing no signs of relenting anytime soon. Q2 saw a much needed increase in supply (Y/Y 8.6% and Q/Q 26%), however it was again outpaced by heavy demand. The 0.79 Sales to New Listing Ratio is a direct reflection of a seriously strong seller's market.

New construction projects have recently provided some new choice for the consumer, but supply of available units is continuing to dwindle. This fact, coupled with the lack of new listings coming to market, indicates we are likely to see the Median Sale Price continuing to achieve new records for the foreseeable future in North Guelph.

Neighbourhoods of North Guelph - Waverley Park, Riverside Park, Country Club, June Avenue, Guelph Lake

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LOOKING AHEAD

Forecast for Q3 | 2015

The reversal of fortunes, will it significantly impact pricing?

For more than a decade the highest growing region of the city has been South Guelph. The influential factors of the University, 401 proximity and the vast majority of significant new construction projects has fueled this meteoric growth. This long ride at the top might not but over yet, but we are seeing some much needed parity now entering the marketplace. Although in different stages, the other areas of the city are all in major development mode. The word is out, as many new Guelphites are avoiding the higher South Guelph prices and seeking better value elsewhere in the city. As always, we will be following this new trend very closely.

The value compass still points North

For the past several quarters more and more families have been finding their perfect home in the North end of Guelph, this is a trend that isn't likely to change in Q3. More house for less money and a variety of newer options tells us North Guelph will continue to fetch strong competition in coming months.

To get the best of the West, you might have to be patient.

West Guelph was the place to be in Q2. The recent boom in manufacturing jobs, coupled with the family-friendly streets that define the area have led to an insatiable demand for housing west of the Hanlon. The numbers say that Q3 shouldn't provide anything different. Have patience and work with an industry professional who will make it happen for you, that's the very best advice we can give to anyone looking to join the party in West Guelph.

Have a specific question on the upcoming market?

We always welcome your opinions, questions and feedback on how we can make this report better. Feel free to touch base and make use of our market knowledge. You can also speak to an agent LIVE at trilliumwest.com and get your questions answered in real-time. Yes, very cool, we know.

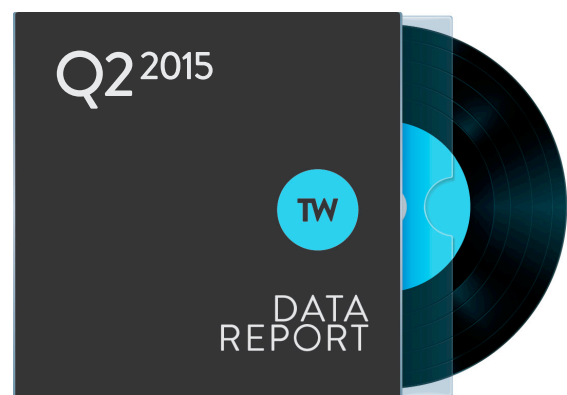
About TRILLIUMWEST

At TrilliumWest, we take pride in studying and understanding the numbers of the Guelph real estate market.

We are a hard-working group of marketing, investment and sales professionals who love to look deeper into the data so that we can advise, educate and assist our clients in achieving their real estate goals.

There is a difference. Visit us on-line and touch base to connect with a true local real estate professional.

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