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

QUARTERLY
DATA REPORT

TABLE OF
contents

| | | |
|--------------------------------------|-------------------------------|-----------|
| City of Cambridge | CAMBRIDGE OVERVIEW | 5 |
| | HESPELER CAMBRIDGE | 6 |
| | PRESTON CAMBRIDGE | 7 |
| | NORTH GALT CAMBRIDGE | 8 |
| | EAST GALT CAMBRIDGE | 9 |
| | WEST GALT CAMBRIDGE | 10 |
| City of Guelph | GUELPH OVERVIEW | 12 |
| | DOWNTOWN GUELPH | 13 |
| | MIDTOWN GUELPH | 14 |
| | SOUTH GUELPH | 15 |
| | EAST GUELPH | 16 |
| | WEST GUELPH | 17 |
| Cities of Kitchener + Waterloo | KW OVERVIEW | 20 |
| | EAST KITCHENER | 21 |
| | WEST KITCHENER | 22 |
| | DOWNTOWN KITCHENER | 23 |
| | UPTOWN WATERLOO | 24 |
| | EAST WATERLOO | 25 |
| The Townships | WEST WATERLOO | 26 |
| | THE TOWNSHIPS OVERVIEW | 28 |
| | CENTRE WELLINGTON | 29 |
| | GUELPH ERAMOSA | 30 |
| | NORTH DUMFRIES | 31 |
| | TOWNSHIP OF PUSLINCH | 32 |
| About TrilliumWest | TOWNSHIP OF WELLESLEY | 33 |
| | TOWNSHIP OF WILMOT | 34 |
| | TOWNSHIP OF WOOLWICH | 35 |
| | ABOUT TRILLIUMWEST | 36 |

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COMPLETE DATA

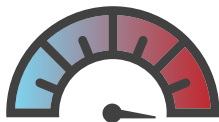
Cambridge

COMPLETE DATA

City of Cambridge

Q4 | SALES TO
new listing ratio

Between 0.4 and 0.6
is considered a balanced market



1.07

INSIDE THE NUMBERS

Just like the rest of the Region

Remember when families around the Region began to move en masse to Cambridge in order to find added value in a home? I think we confidently say that after a huge 2020, that gig is up.

With a median detached sale price that increased 16.6% in 2020, or in other words, the median Cambridge home appreciated almost 100k in just one year. Oh, and in the middle of a global pandemic. This now places the detached home market in Cambridge a mere 3% off of the historically much pricier Kitchener/Waterloo market.

This all makes complete sense, right? For most locals, it won't, but locals aren't driving this change. For GTA Buyers, Cambridge is closer to the big smoke and provides that easy access to the 401, so why would Cambridge possibly be less expensive? This regionalization of home pricing has been building for years and 2020 put the final touches on that.

Big year Cambridge, big year.

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

| | Q4 2020 | % Chg (Y) | Q4 2019 | % Chg (Q) | Q3 2020 |
|------------------------|-----------|-----------|-----------|-----------|-----------|
| MEDIAN DET. SALE PRICE | \$626,000 | 16.6% ▲ | \$537,000 | 16% ▲ | \$616,000 |
| NUMBER OF NEW SALES | 549 | 29.5% ▲ | 424 | 28.3% ▼ | 766 |
| MEDIAN DAYS ON MARKET | 7 | 8 days ▼ | 15 | 3 days ▼ | 10 |
| NEW INVENTORY | 511 | 10.8% ▲ | 461 | 32.7% ▼ | 759 |

UP & DOWN
quick review

- ▲24% Y/Y increase in the East Galt median sale price. That's 6 figure growth in just one year.
- ▲28% Y/Y bump in the West Galt sales to new listing ratio. From 10/10 hot to 11/10 kinda hot.
- ▲46% Y/Y spike in Hespeler new inventory. A big jump, but still not big enough. See below.
- ▲54% Y/Y growth in Hespeler sales volume. A complete purge of inventory to end a historic year.
- ▼9% Q/Q drop in the Preston median listing price. Price low, draw a big crowd - the soup du jour in Q4.
- ▼35% Q/Q decrease in North Galt new inventory. This helped push up to a 665k median detached sale price.
- ▼1% Q/Q reduction in both the East and West Galt median sale prices. Something to worry about?
- ▼1% Q/Q decrease in the Hespeler detached median sale price. A small step back, but maybe something to watch.

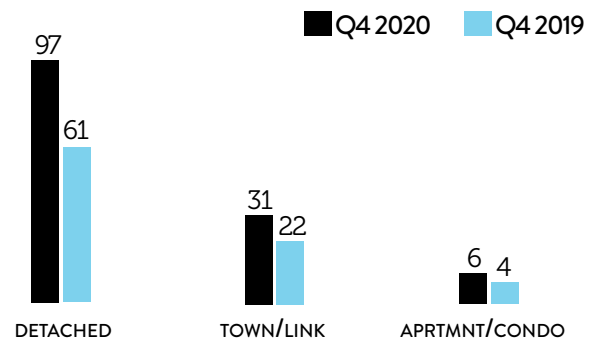
HESPELER CAMBRIDGE

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$595,000 | 134 | 123 | 1.09 | \$630,000 |
| Q4 2019 TOTAL | \$549,900 | 89 | 84 | 1.03 | \$560,000 |
| % CHANGE (+/-) | 8.2% ▲ | 54% ▲ | 46.4% ▲ | 5.8% ▲ | 12.5% ▲ |
| Q3 2020 TOTAL | \$589,900 | 206 | 173 | 1.20 | \$589,900 |
| % CHANGE (+/-) | 0.86% ▲ | 34.9% ▼ | 28.9% ▼ | 9.2% ▼ | 6.8% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 90 | 58 | ▲ |
| TOWN/LINK HOMES | 28 | 19 | ▲ |
| APARTMENT/CONDO | 5 | 7 | ▼ |
| TOTAL | 123 | 84 | ▲ |
| SALES TO NEW RATIO | 1.09 | 1.04 | ▲ |

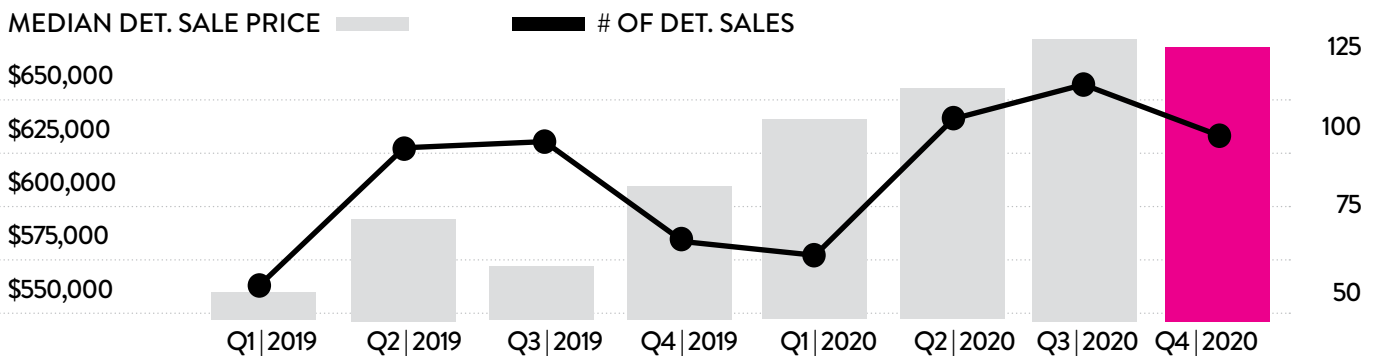
Q4 SALES BY INVENTORY TYPE



\$675,000
DETACHED MEDIAN SALE

\$552,000
TOWN/LINK MEDIAN SALE

\$367,125
APMNT/CONDO MEDIAN SALE



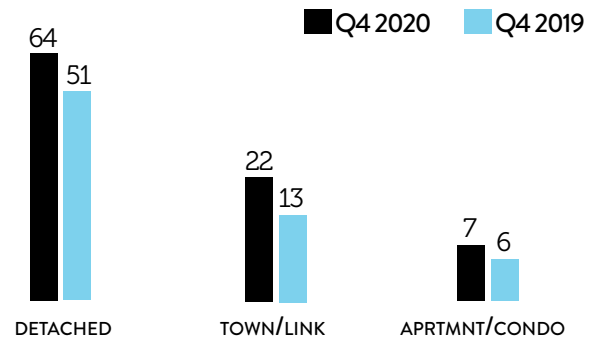
PRESTON CAMBRIDGE

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$500,000 | 93 | 100 | 0.93 | \$560,000 |
| Q4 2019 TOTAL | \$499,900 | 70 | 94 | 0.74 | \$473,750 |
| % CHANGE (+/-) | 0.02% ▲ | 32.9% ▲ | 6.4% ▲ | 25.7% ▲ | 18.2% ▲ |
| Q3 2020 TOTAL | \$550,500 | 129 | 130 | 0.99 | \$553,800 |
| % CHANGE (+/-) | 9.2% ▼ | 27.9% ▼ | 23.1% ▼ | 6.1% ▼ | 1.1% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 67 | 65 | ▲ |
| TOWN/LINK HOMES | 25 | 21 | ▲ |
| APARTMENT/CONDO | 8 | 8 | = |
| TOTAL | 100 | 94 | ▲ |
| SALES TO NEW RATIO | 0.93 | 0.74 | ▲ |

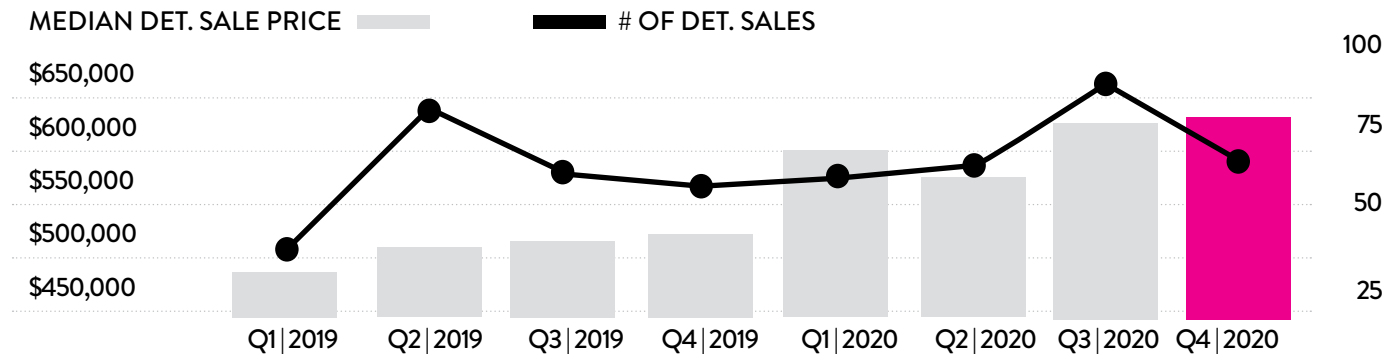
Q4 SALES BY INVENTORY TYPE



\$605,000
DETACHED MEDIAN SALE

\$513,000
TOWN/LINK MEDIAN SALE

\$360,000
APMNT/CONDO MEDIAN SALE



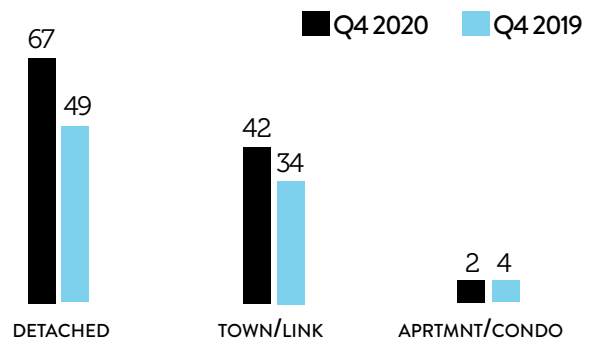
NORTH GALT CAMBRIDGE

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$534,900 | 111 | 102 | 1.09 | \$580,000 |
| Q4 2019 TOTAL | \$477,450 | 87 | 90 | 0.97 | \$480,100 |
| % CHANGE (+/-) | 12% ▲ | 276% ▲ | 133% ▲ | 12.4% ▲ | 20.8% ▲ |
| Q3 2020 TOTAL | \$560,000 | 153 | 156 | 0.98 | \$580,000 |
| % CHANGE (+/-) | 4.5% ▼ | 27.4% ▼ | 34.6% ▼ | 11.2% ▲ | = |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 60 | 53 | ▲ |
| TOWN/LINK HOMES | 37 | 34 | ▲ |
| APARTMENT/CONDO | 5 | 3 | ▲ |
| TOTAL | 102 | 90 | ▲ |
| SALES TO NEW RATIO | 1.09 | 0.97 | ▲ |

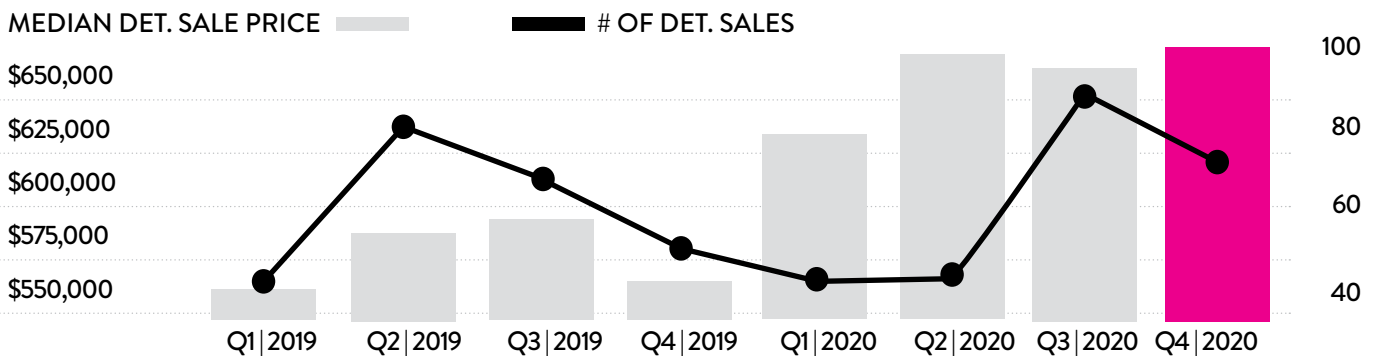
Q4 SALES BY INVENTORY TYPE



\$665,000
DETACHED MEDIAN SALE

\$493,500
TOWN/LINK MEDIAN SALE

\$434,900
APMNT/CONDO MEDIAN SALE



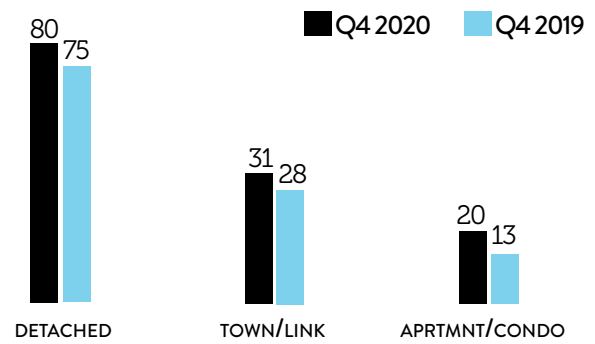
EAST GALT CAMBRIDGE

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$499,900 | 131 | 121 | 1.08 | \$550,000 |
| Q4 2019 TOTAL | \$419,900 | 116 | 119 | 0.97 | \$444,000 |
| % CHANGE (+/-) | 19% ▲ | 12.9% ▲ | 1.7% ▲ | 11.3% ▲ | 23.9% ▲ |
| Q3 2020 TOTAL | \$519,900 | 166 | 182 | 0.91 | \$554,500 |
| % CHANGE (+/-) | 3.8% ▼ | 21.1% ▼ | 33.5% ▼ | 18.7% ▲ | 0.81% ▼ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 77 | 74 | ▲ |
| TOWN/LINK HOMES | 27 | 22 | ▲ |
| APARTMENT/CONDO | 17 | 23 | ▼ |
| TOTAL | 121 | 119 | ▲ |
| SALES TO NEW RATIO | 1.08 | 0.97 | ▲ |

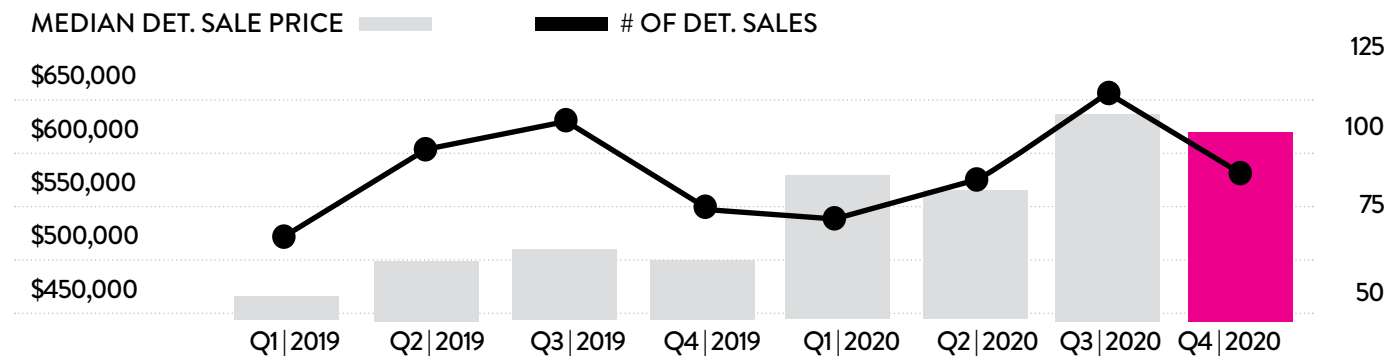
Q4 SALES BY INVENTORY TYPE



\$590,000
DETACHED MEDIAN SALE

\$511,000
TOWN/LINK MEDIAN SALE

\$372,450
APMNT/CONDO MEDIAN SALE



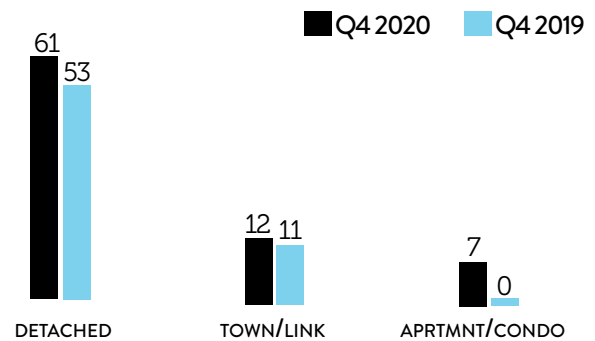
WEST GALT CAMBRIDGE

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$550,000 | 80 | 73 | 1.10 | \$573,400 |
| Q4 2019 TOTAL | \$534,900 | 64 | 74 | 0.86 | \$523,500 |
| % CHANGE (+/-) | 2.8% ▲ | 25% ▲ | 13% ▼ | 279% ▲ | 9.5% ▲ |
| Q3 2020 TOTAL | \$584,950 | 112 | 118 | 0.95 | \$581,350 |
| % CHANGE (+/-) | 6% ▼ | 28.6% ▼ | 38.1% ▼ | 15.8% ▲ | 1.4% ▼ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 54 | 63 | ▼ |
| TOWN/LINK HOMES | 14 | 11 | ▲ |
| APARTMENT/CONDO | 5 | 0 | ▲ |
| TOTAL | 73 | 74 | ▼ |
| SALES TO NEW RATIO | 1.10 | 0.86 | ▲ |

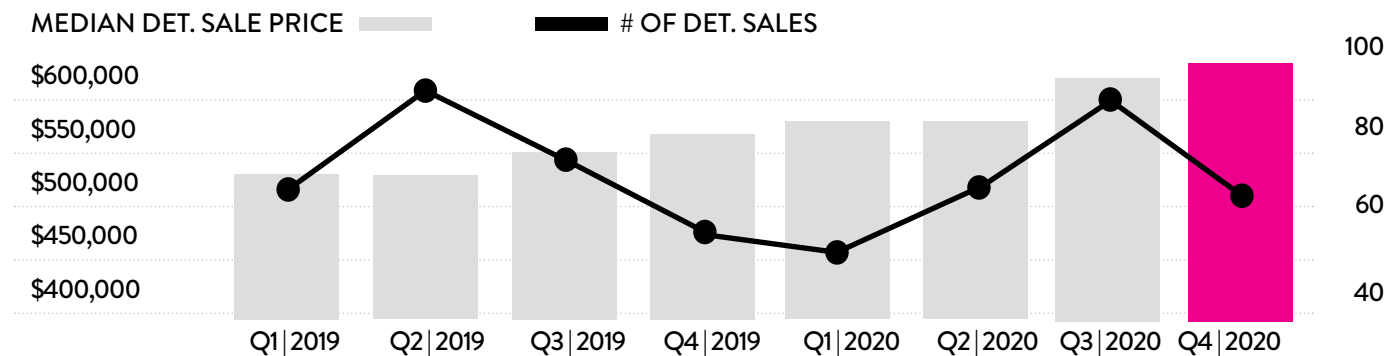
Q4 SALES BY INVENTORY TYPE



\$601,000
DETACHED MEDIAN SALE

\$478,000
TOWN/LINK MEDIAN SALE

\$497,000
APMNT/CONDO MEDIAN SALE





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COMPLETE DATA

Guelph

COMPLETE DATA

City of Guelph

INSIDE THE NUMBERS

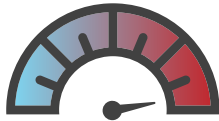
Time for the truth

Guelph, like it or not, has become a very elite place to live. That's not a political statement, it's a statistical statement. With a median detached sale price of \$715,000 and rising, fewer and fewer individuals and families are looking at Guelph as a viable option to live. 23% Y/Y increases are simply not healthy, nor sustainable. Not much room for debate there.

How did we get here? Quite simply, through a complete lack of supply and one that current city homeowners can not provide. Guelph is not building nearly enough detached homes to keep up with demand. The entire city built 85 detached homes last year, an all-time low and a very problematic number. Ontario cities a quarter the size of Guelph build twice that amount in half as much time. If changes to housing supply don't happen soon, we will see the median detached price of a home exceed 1 million in Guelph by the end of 2022. Let that sink in.

Q4 | SALES TO new listing ratio

Between 0.4 and 0.6 is considered a balanced market



1.20

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

| | Q4 2020 | % Chg (Y) | Q4 2019 | % Chg (Q) | Q3 2020 |
|------------------------|-----------|-----------|-----------|-----------|-----------|
| MEDIAN DET. SALE PRICE | \$715,000 | 22.7% ▲ | \$582,500 | 2.1% ▲ | \$700,000 |
| NUMBER OF NEW SALES | 587 | 26.2% ▲ | 465 | 19.7% ▼ | 731 |
| MEDIAN DAYS ON MARKET | 8 | 11 days ▼ | 19 | 2 days ▼ | 10 |
| NEW INVENTORY | 487 | 6.1% ▲ | 459 | 39.6% ▼ | 807 |

UP & DOWN quick review

- ▲15% Y/Y jump in the detached median sale price in South Guelph. Now at a sky-high \$830k.
- ▲28% Y/Y spike in the West Guelph median sale price. We said they were due for a jump, whoa.
- ▲25% Q/Q increase in the North Guelph sales to new listing ratio. Officially flying through hyper-space at ludicrous speed.
- ▲14% Y/Y increase in the East Guelph median condo sale price. In the midst of a GTA condo crisis, this is a significant figure.

- ▼17% Y/Y decrease in Midtown new inventory. Better look hard, homes are getting harder and harder to find.
- ▼24% Difference between East and West Guelph median condo sale prices. An opportunity not likely to last.
- ▼15% Difference between the Downtown and city-wide median detached sale prices. Will you find a score in the core?
- ▼5% Q/Q reduction in the Downtown median sale price. An open window here you can't miss, see above.

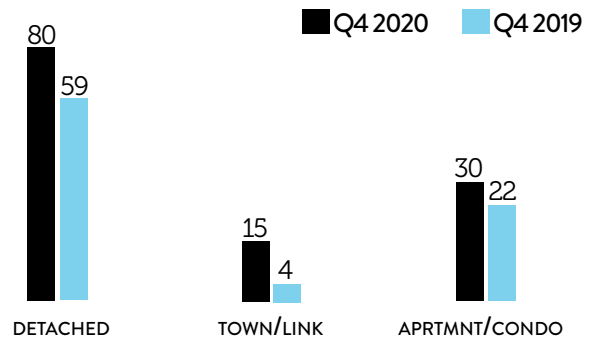
DOWNTOWN GUELPH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$599,000 | 125 | 107 | 1.17 | \$587,600 |
| Q4 2019 TOTAL | \$524,900 | 85 | 90 | 0.94 | \$495,000 |
| % CHANGE (+/-) | 14.1% ▲ | 47.1% ▲ | 18.9% ▲ | 24.5% ▲ | 18.7% ▲ |
| Q3 2020 TOTAL | \$589,900 | 80 | 104 | 0.77 | \$617,500 |
| % CHANGE (+/-) | 1.5% ▲ | 56.2% ▲ | 2.9% ▲ | 51.9% ▲ | 4.8% ▼ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 67 | 61 | ▲ |
| TOWN/LINK HOMES | 14 | 10 | ▲ |
| APARTMENT/CONDO | 26 | 19 | ▲ |
| TOTAL | 107 | 90 | ▲ |
| SALES TO NEW RATIO | 1.17 | 0.94 | ▲ |

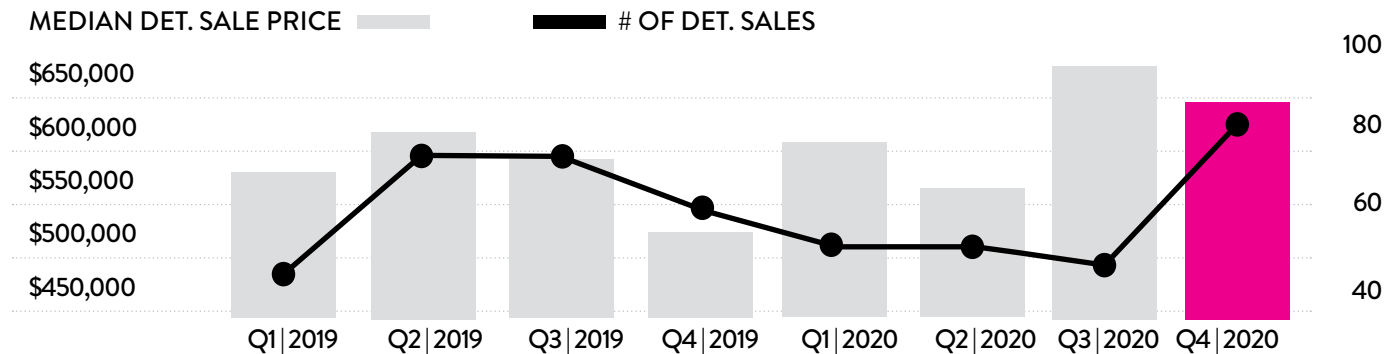
Q4 SALES BY INVENTORY TYPE



\$620,000
DETACHED MEDIAN SALE

\$547,000
TOWN/LINK MEDIAN SALE

\$430,000
APMNT/CONDO MEDIAN SALE



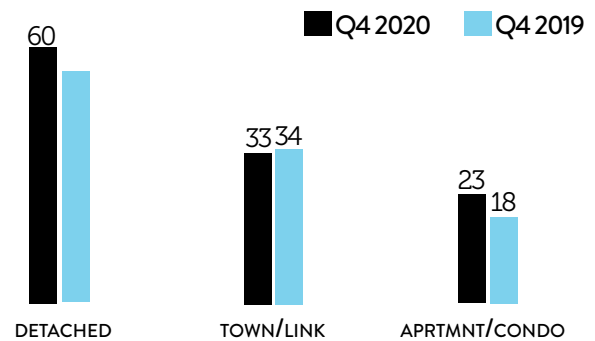
MIDTOWN GUELPH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$589,900 | 116 | 86 | 1.35 | \$630,000 |
| Q4 2019 TOTAL | \$584,900 | 105 | 104 | 1.01 | \$555,100 |
| % CHANGE (+/-) | 0.85% ▲ | 10.5% ▲ | 173% ▼ | 33.6% ▲ | 13.5% ▲ |
| Q3 2020 TOTAL | \$684,450 | 134 | 166 | 0.81 | \$612,500 |
| % CHANGE (+/-) | 13.8% ▼ | 13.4% ▼ | 48.2% ▼ | 66.7% ▲ | 2.9% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 41 | 54 | ▼ |
| TOWN/LINK HOMES | 26 | 35 | ▼ |
| APARTMENT/CONDO | 19 | 15 | ▲ |
| TOTAL | 86 | 104 | ▼ |
| SALES TO NEW RATIO | 1.35 | 1.01 | ▲ |

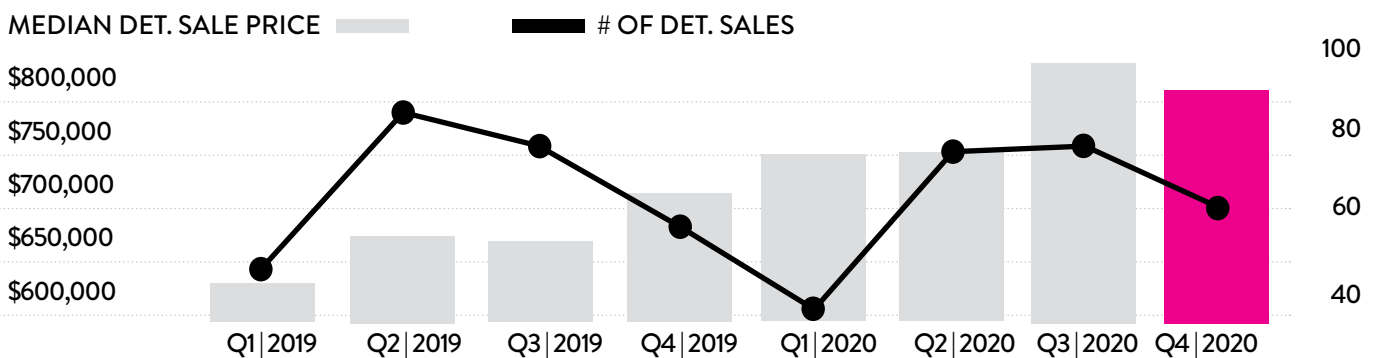
Q4 SALES BY INVENTORY TYPE



\$783,500
DETACHED MEDIAN SALE

\$499,900
TOWN/LINK MEDIAN SALE

\$395,000
APMNT/CONDO MEDIAN SALE



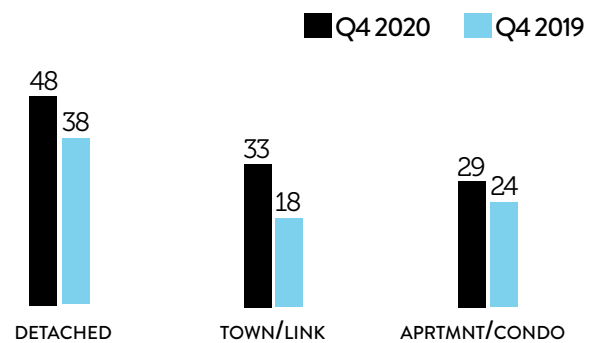
SOUTH GUELPH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$587,500 | 110 | 83 | 1.33 | \$620,500 |
| Q4 2019 TOTAL | \$571,900 | 80 | 89 | 0.90 | \$585,000 |
| % CHANGE (+/-) | 2.7% ▲ | 375% ▲ | 6.7% ▼ | 478% ▲ | 6.1% ▲ |
| Q3 2020 TOTAL | \$685,000 | 168 | 193 | 0.87 | \$665,000 |
| % CHANGE (+/-) | 14.2% ▼ | 34.5% ▼ | 57% ▼ | 52.9% ▲ | 6.7% ▼ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 33 | 35 | ▼ |
| TOWN/LINK HOMES | 26 | 24 | ▲ |
| APARTMENT/CONDO | 24 | 30 | ▼ |
| TOTAL | 83 | 89 | ▼ |
| SALES TO NEW RATIO | 1.33 | 0.90 | ▲ |

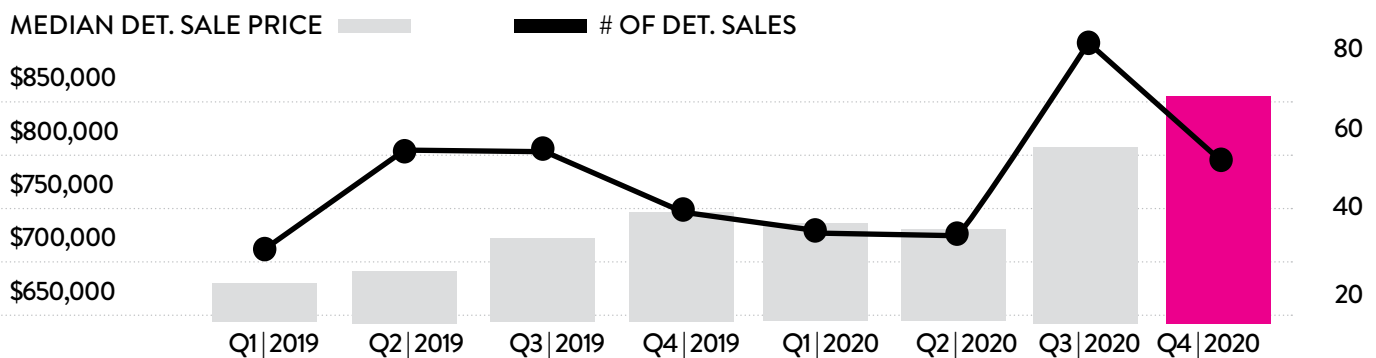
Q4 SALES BY INVENTORY TYPE



\$829,950
DETACHED MEDIAN SALE

\$570,000
TOWN/LINK MEDIAN SALE

\$419,900
APMNT/CONDO MEDIAN SALE



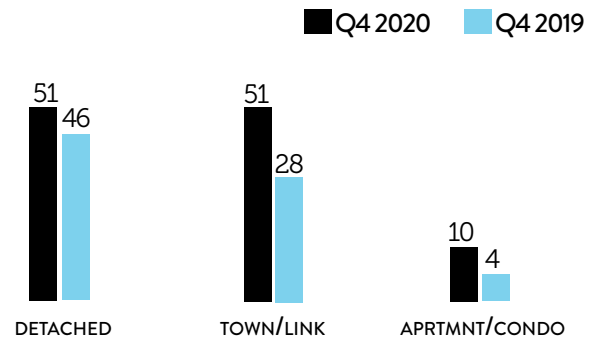
EAST GUELPH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$599,000 | 112 | 110 | 1.02 | \$630,000 |
| Q4 2019 TOTAL | \$542,000 | 78 | 72 | 1.08 | \$520,000 |
| % CHANGE (+/-) | 10.5% ▲ | 43.6% ▲ | 52.8% ▲ | 5.5% ▼ | 21.1% ▲ |
| Q3 2020 TOTAL | \$599,000 | 152 | 151 | 1.01 | \$605,000 |
| % CHANGE (+/-) | = | 26.3% ▼ | 27.1% ▼ | 0.99% ▲ | 4.1% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 54 | 43 | ▲ |
| TOWN/LINK HOMES | 46 | 23 | ▲ |
| APARTMENT/CONDO | 10 | 6 | ▲ |
| TOTAL | 110 | 72 | ▲ |
| SALES TO NEW RATIO | 1.02 | 1.08 | ▼ |

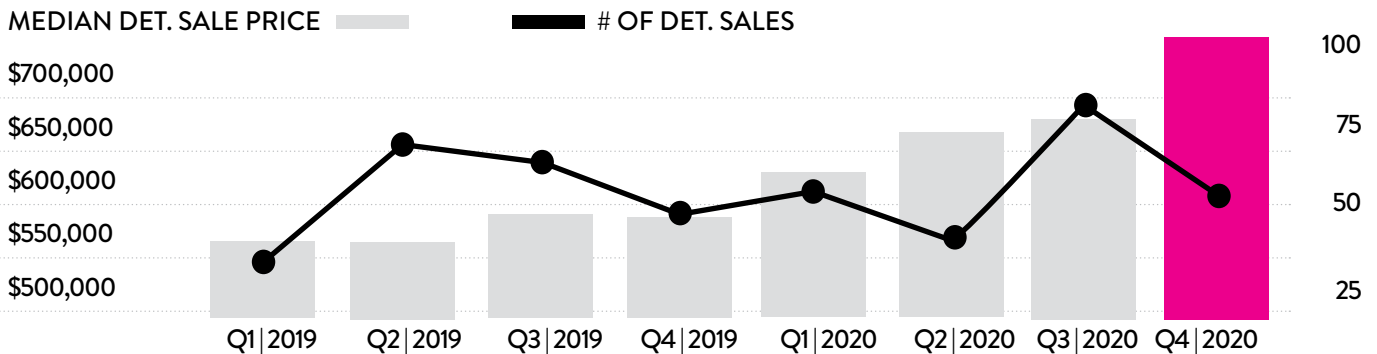
Q4 SALES BY INVENTORY TYPE



\$725,000
DETACHED MEDIAN SALE

\$620,000
TOWN/LINK MEDIAN SALE

\$371,500
APMNT/CONDO MEDIAN SALE



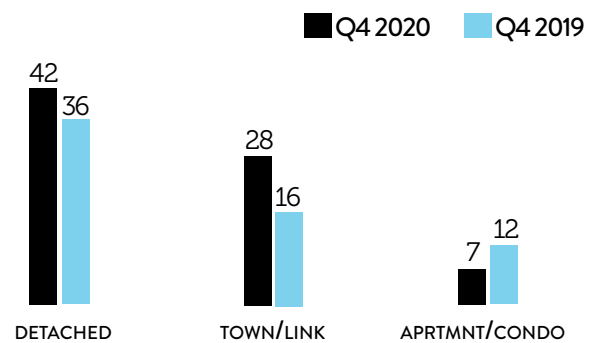
WEST GUELPH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$638,000 | 77 | 65 | 1.18 | \$636,000 |
| Q4 2019 TOTAL | \$499,900 | 64 | 58 | 1.10 | \$495,500 |
| % CHANGE (+/-) | 27.6% ▲ | 20.3% ▲ | 12.1% ▲ | 7.3% ▲ | 28.4% ▲ |
| Q3 2020 TOTAL | \$540,000 | 114 | 112 | 1.02 | \$562,550 |
| % CHANGE (+/-) | 18.1% ▲ | 32.5% ▼ | 42% ▼ | 15.7% ▲ | 13.1% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 35 | 31 | ▲ |
| TOWN/LINK HOMES | 25 | 15 | ▲ |
| APARTMENT/CONDO | 5 | 12 | ▼ |
| TOTAL | 65 | 58 | ▲ |
| SALES TO NEW RATIO | 1.18 | 1.10 | ▲ |

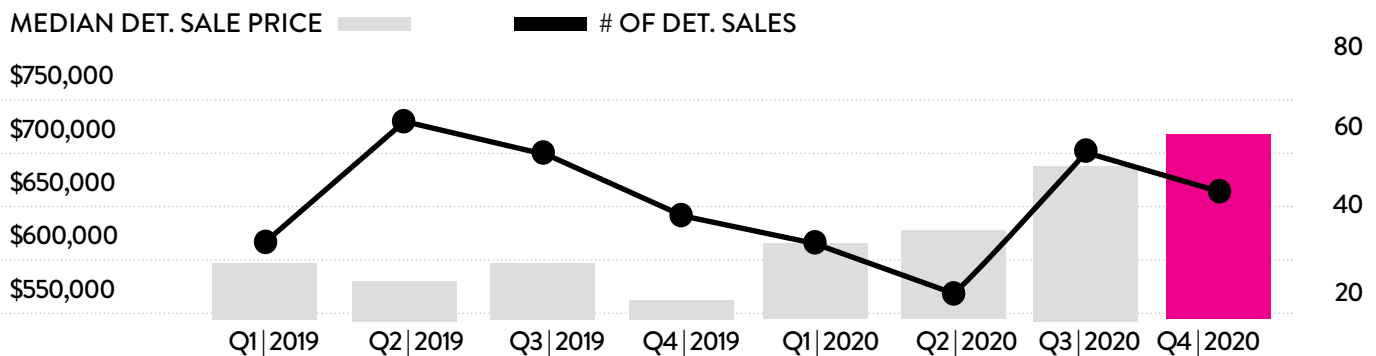
Q4 SALES BY INVENTORY TYPE



\$697,450
DETACHED MEDIAN SALE

\$445,000
TOWN/LINK MEDIAN SALE

\$300,000
APMNT/CONDO MEDIAN SALE



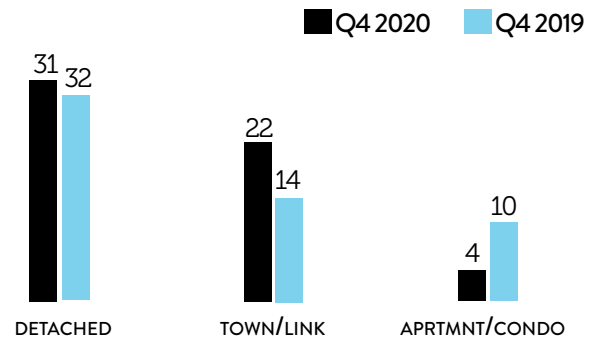
NORTH GUELPH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$629,500 | 57 | 45 | 1.27 | \$634,900 |
| Q4 2019 TOTAL | \$504,950 | 56 | 46 | 1.22 | \$508,000 |
| % CHANGE (+/-) | 24.7% ▲ | 1.8% ▲ | 2.2% ▼ | 4% ▲ | 25% ▲ |
| Q3 2020 TOTAL | \$619,900 | 83 | 81 | 1.02 | \$619,900 |
| % CHANGE (+/-) | 1.5% ▲ | 31.3% ▼ | 44.4% ▼ | 24.5% ▲ | 2.4% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 24 | 26 | ▼ |
| TOWN/LINK HOMES | 16 | 12 | ▲ |
| APARTMENT/CONDO | 5 | 8 | ▼ |
| TOTAL | 45 | 46 | ▼ |
| SALES TO NEW RATIO | 1.27 | 1.22 | ▲ |

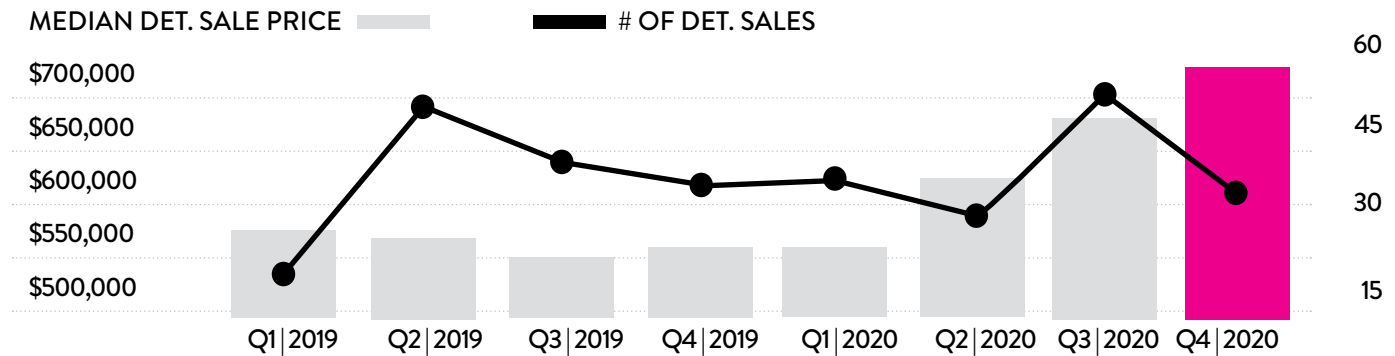
Q4 SALES BY INVENTORY TYPE



\$703,700
DETACHED MEDIAN SALE

\$619,900
TOWN/LINK MEDIAN SALE

\$410,000
APMNT/CONDO MEDIAN SALE



TW 4

20

20

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COMPLETE DATA

Kitchener
+ Waterloo

COMPLETE DATA

Cities of
Kitchener
+ Waterloo

Q4 | SALES TO
new listing ratio

Between 0.4 and 0.6
is considered a balanced market



1.07

- ▲25% Y/Y growth in the East Waterloo median sale price. 123k in one year, 10.25k a month, 337 bucks a day, your choice.
- ▲16% Y/Y jump in the West Kitchener median detached sale price. On a quick path to surpass that 700k mark in 2021.
- ▲3% Y/Y increase in the Downtown Kitchener median condo sale price. The COVID-effect felt in the core.
- ▲2% Y/Y increase in the Uptown Waterloo median condo sale price. See above.

- ▼39% Q/Q drop in West Kitchener new inventory. Increased competition as demand continued to surge.
- ▼4% Q/Q decline in the Downtown Kitchener median sale price. A slight turn down on an up year.
- ▼2% Q/Q decrease in the East Waterloo median list price. List low and draw a big crowd is the game being played.
- ▼1% Q/Q reduction in the West Waterloo median list price. See above.

INSIDE THE NUMBERS

Quite the year KDub. So now what?

Here is what we know - the median detached home sale price increased by 17.8% over this past year, ending the year at \$683,550. If COVID has taught us anything in the real estate market, it is that more and more people are looking for more and more space. There is a stronger desire than ever to be detached.

As the pandemic has worn on, motorcades of GTA-dwellers continue to venture down the 401 in search of more affordable detached housing. Add that to the already scorching marketplace and you have yourself a bit of a real estate firestorm. That's how we got here.

Will 2021 see anything change? Sorry prospective purchasers, we can't see anything in the data to suggest anything short of this continuation of double-digit growth. By the way, another 17.8% increase would place the median detached home over 800k by the end of 2021. Just an FYI.

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

| | Q4 2020 | % Chg (Y) | Q4 2019 | % Chg (Q) | Q3 2020 |
|------------------------|-----------|-----------|-----------|-----------|-----------|
| MEDIAN DET. SALE PRICE | \$683,550 | 178% ▲ | \$580,000 | 2% ▲ | \$670,000 |
| NUMBER OF NEW SALES | 1460 | 35.1% ▲ | 1081 | 24.6% ▼ | 1936 |
| MEDIAN DAYS ON MARKET | 8 | 7 days ▼ | 15 | = | 7 |
| NEW INVENTORY | 1369 | 21.8% ▲ | 1124 | 38.2% ▼ | 2214 |

UP & DOWN
quick review

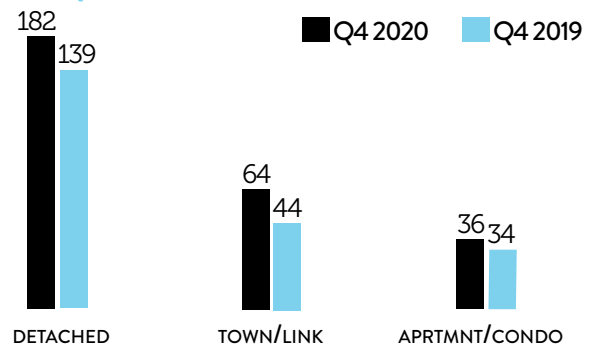
EAST KITCHENER

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$550,000 | 282 | 273 | 1.03 | \$588,642 |
| Q4 2019 TOTAL | \$499,900 | 217 | 267 | 0.81 | \$488,000 |
| % CHANGE (+/-) | 10% ▲ | 29.9% ▲ | 2.2% ▲ | 27.1% ▲ | 20.6% ▲ |
| Q3 2020 TOTAL | \$539,900 | 408 | 442 | 0.92 | \$575,000 |
| % CHANGE (+/-) | 1.9% ▲ | 30.9% ▼ | 38.2% ▼ | 11.9% ▲ | 2.4% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 182 | 166 | ▲ |
| TOWN/LINK HOMES | 56 | 51 | ▲ |
| APARTMENT/CONDO | 35 | 50 | ▼ |
| TOTAL | 273 | 267 | ▲ |
| SALES TO NEW RATIO | 1.03 | 0.81 | ▲ |

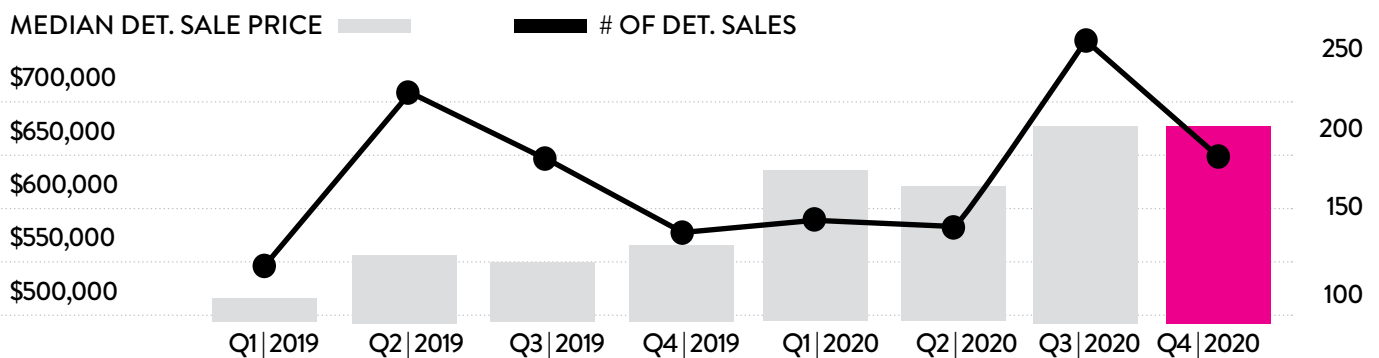
Q4 SALES BY INVENTORY TYPE



\$650,000
DETACHED MEDIAN SALE

\$520,500
TOWN/LINK MEDIAN SALE

\$324,200
APMNT/CONDO MEDIAN SALE



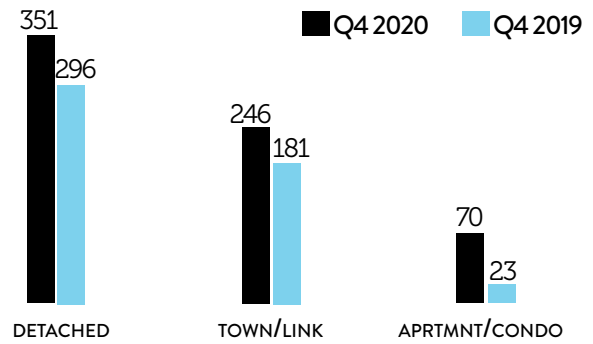
WEST KITCHENER

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$535,000 | 667 | 593 | 1.12 | \$585,300 |
| Q4 2019 TOTAL | \$499,900 | 500 | 464 | 1.08 | \$504,550 |
| % CHANGE (+/-) | 7% ▲ | 33.4% ▲ | 27.8% ▲ | 3.7% ▲ | 16% ▲ |
| Q3 2020 TOTAL | \$548,000 | 862 | 962 | 0.90 | \$575,418 |
| % CHANGE (+/-) | 2.4% ▼ | 22.6% ▼ | 38.4% ▼ | 24.4% ▲ | 1.7% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 318 | 292 | ▲ |
| TOWN/LINK HOMES | 217 | 138 | ▲ |
| APARTMENT/CONDO | 58 | 34 | ▲ |
| TOTAL | 593 | 464 | ▲ |
| SALES TO NEW RATIO | 1.12 | 1.08 | ▲ |

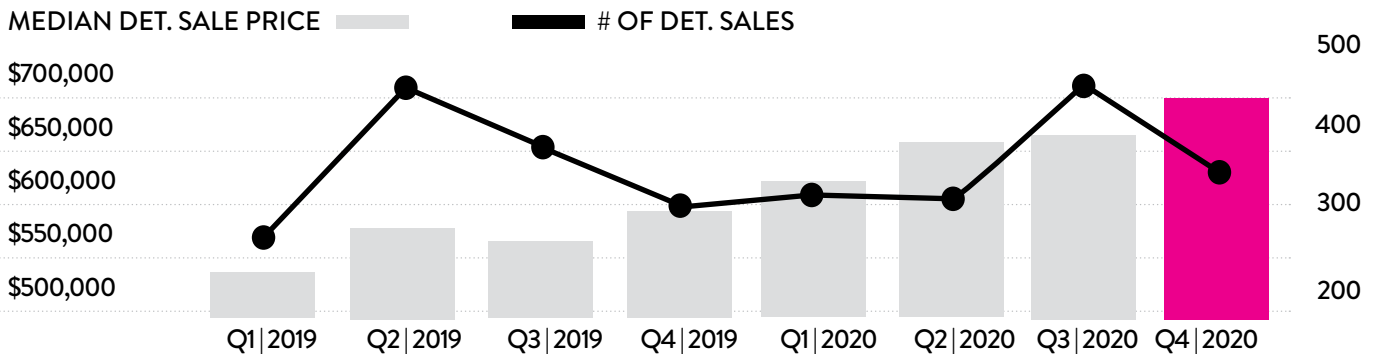
Q4 SALES BY INVENTORY TYPE



\$675,000
DETACHED MEDIAN SALE

\$505,000
TOWN/LINK MEDIAN SALE

\$350,250
APMNT/CONDO MEDIAN SALE



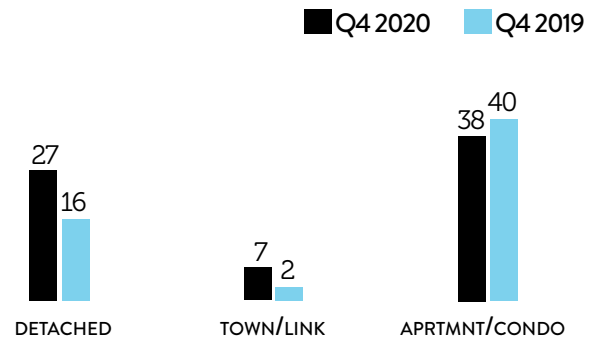
DOWNTOWN KITCHENER

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$370,500 | 72 | 66 | 1.09 | \$433,000 |
| Q4 2019 TOTAL | \$399,000 | 58 | 47 | 1.23 | \$377,500 |
| % CHANGE (+/-) | 7.1% ▼ | 24.2% ▲ | 40.4% ▲ | 11.4% ▼ | 14.7% ▲ |
| Q3 2020 TOTAL | \$429,900 | 83 | 125 | 0.66 | \$450,000 |
| % CHANGE (+/-) | 13.8% ▼ | 13.2% ▼ | 47.2% ▼ | 65.1% ▲ | 3.8% ▼ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 25 | 17 | ▲ |
| TOWN/LINK HOMES | 3 | 1 | ▲ |
| APARTMENT/CONDO | 38 | 29 | ▲ |
| TOTAL | 66 | 47 | ▲ |
| SALES TO NEW RATIO | 1.09 | 1.23 | ▼ |

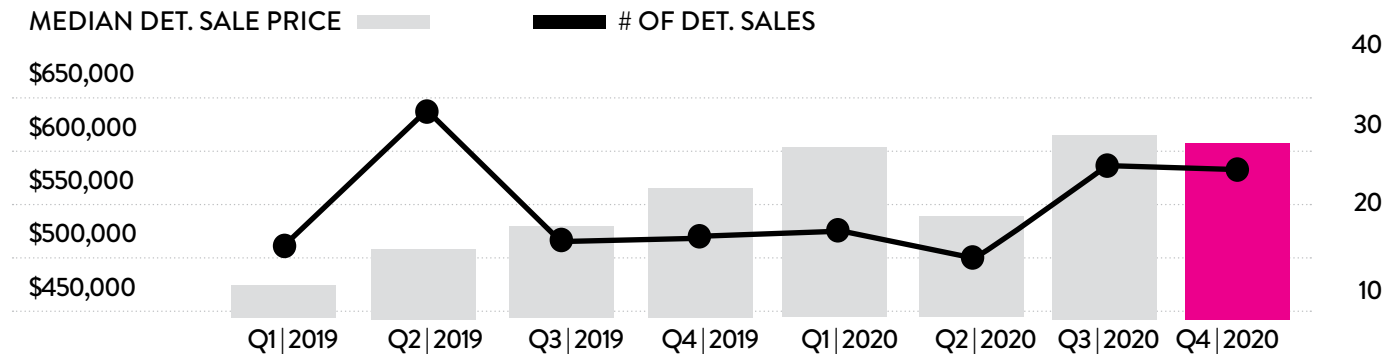
Q4 SALES BY INVENTORY TYPE



\$580,610
DETACHED MEDIAN SALE

\$439,000
TOWN/LINK MEDIAN SALE

\$369,000
APMNT/CONDO MEDIAN SALE



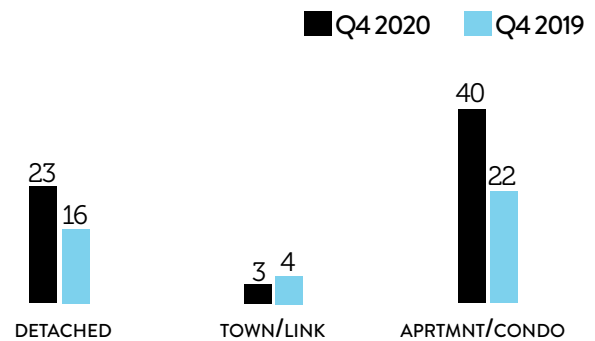
UPTOWN WATERLOO

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$524,000 | 66 | 67 | 0.99 | \$542,450 |
| Q4 2019 TOTAL | \$489,900 | 42 | 62 | 0.68 | \$486,250 |
| % CHANGE (+/-) | 7% ▲ | 57.1% ▲ | 8.1% ▲ | 45.6% ▲ | 11.6% ▲ |
| Q3 2020 TOTAL | \$539,000 | 75 | 99 | 0.76 | \$507,000 |
| % CHANGE (+/-) | 2.8% ▼ | 12% ▼ | 32.3% ▼ | 30.3% ▲ | 7% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 24 | 19 | ▲ |
| TOWN/LINK HOMES | 4 | 11 | ▼ |
| APARTMENT/CONDO | 39 | 32 | ▲ |
| TOTAL | 67 | 62 | ▲ |
| SALES TO NEW RATIO | 0.99 | 0.68 | ▲ |

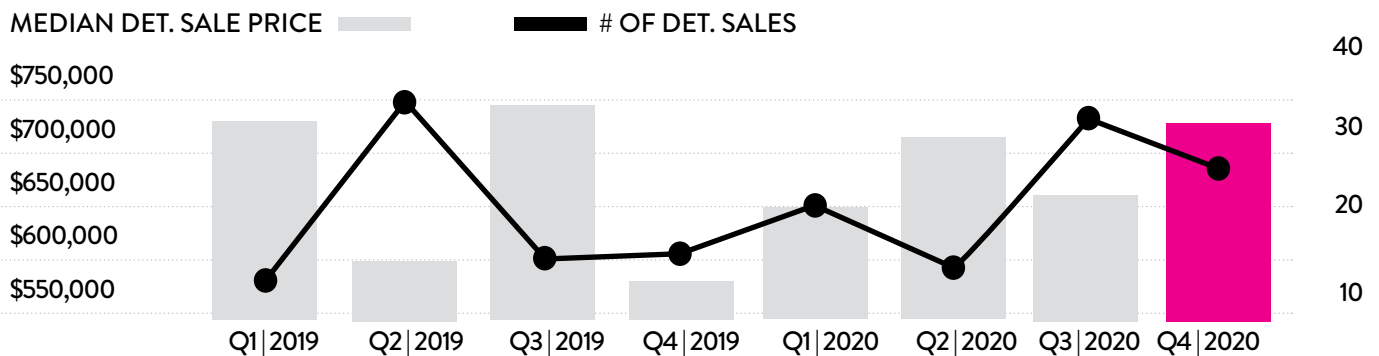
Q4 SALES BY INVENTORY TYPE



\$707,000
DETACHED MEDIAN SALE

\$500,000
TOWN/LINK MEDIAN SALE

\$426,000
APMNT/CONDO MEDIAN SALE



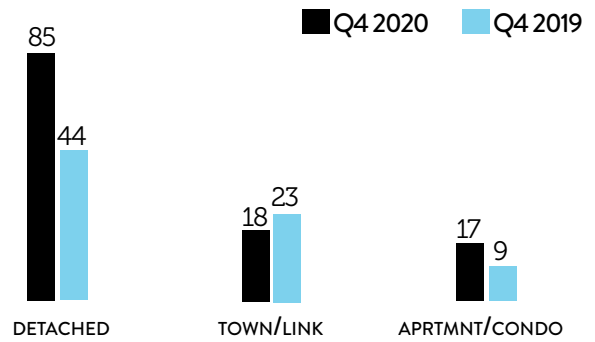
EAST WATERLOO

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$596,750 | 120 | 107 | 1.12 | \$658,900 |
| Q4 2019 TOTAL | \$500,000 | 76 | 79 | 0.96 | \$525,500 |
| % CHANGE (+/-) | 19.3% ▲ | 57.9% ▲ | 35.4% ▲ | 16.6% ▲ | 25.4% ▲ |
| Q3 2020 TOTAL | \$610,000 | 182 | 181 | 1.01 | \$632,000 |
| % CHANGE (+/-) | 2.2% ▼ | 34.1% ▼ | 40.9% ▼ | 10.9% ▲ | 4.3% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 73 | 46 | ▲ |
| TOWN/LINK HOMES | 17 | 23 | ▼ |
| APARTMENT/CONDO | 17 | 10 | ▲ |
| TOTAL | 107 | 79 | ▲ |
| SALES TO NEW RATIO | 1.12 | 0.96 | ▲ |

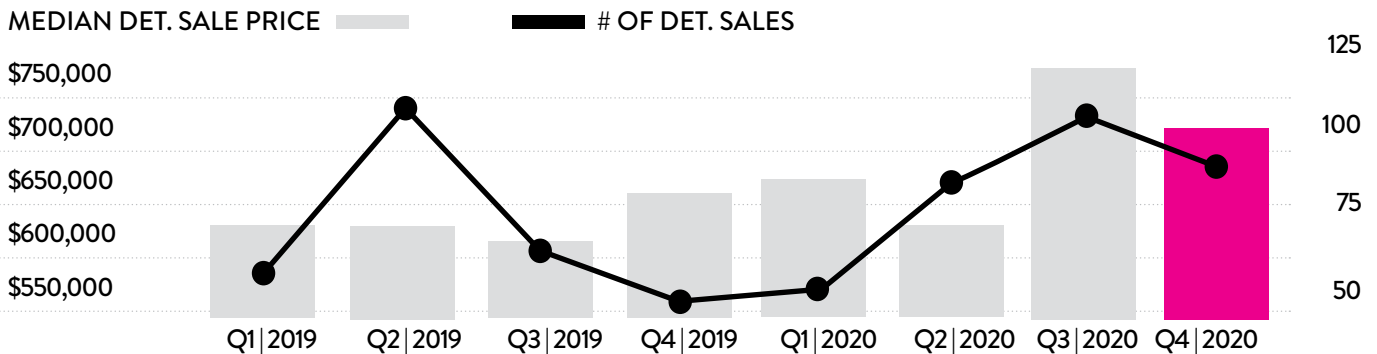
Q4 SALES BY INVENTORY TYPE



\$701,250
DETACHED MEDIAN SALE

\$510,000
TOWN/LINK MEDIAN SALE

\$346,000
APMNT/CONDO MEDIAN SALE



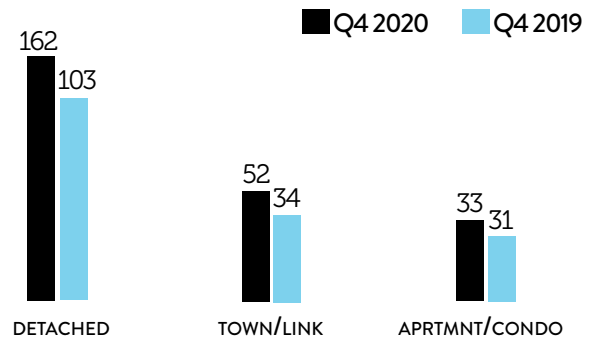
WEST WATERLOO

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$574,900 | 247 | 258 | 0.96 | \$660,000 |
| Q4 2019 TOTAL | \$506,000 | 168 | 186 | 0.90 | \$575,000 |
| % CHANGE (+/-) | 13.6% ▲ | 47% ▲ | 38.7% ▲ | 6.7% ▲ | 14.8% ▲ |
| Q3 2020 TOTAL | \$580,000 | 326 | 405 | 0.80 | \$640,500 |
| % CHANGE (+/-) | 0.88% ▼ | 24.2% ▼ | 36.3% ▼ | 20% ▲ | 3% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| DETACHED HOMES | 152 | 97 | ▲ |
| TOWN/LINK HOMES | 50 | 31 | ▲ |
| APARTMENT/CONDO | 56 | 58 | ▼ |
| TOTAL | 258 | 186 | ▲ |
| SALES TO NEW RATIO | 0.96 | 0.90 | ▲ |

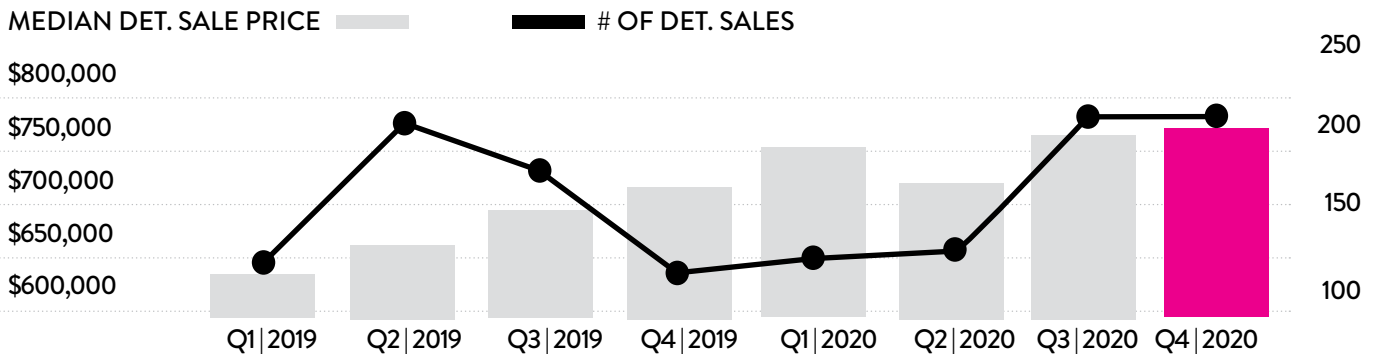
Q4 SALES BY INVENTORY TYPE



\$745,500
DETACHED MEDIAN SALE

\$500,000
TOWN/LINK MEDIAN SALE

\$340,000
APMNT/CONDO MEDIAN SALE



TW4

20

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COMPLETE DATA
Townships

COMPLETE DATA

The Townships

INSIDE THE NUMBERS

The start of the great migration?

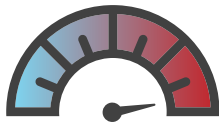
We all dream of it - that perfect quiet living in the ideal country setting. For most urban dwellers it is a later in life dream that we only hope to someday afford. In 2020, many folks moved up their timeline and made that dream a reality by taking maximum advantage of record-high home prices in the city.

We see this as only the beginning of a much bigger movement. The shortage of detached home supply, coupled with the very low new home production of detached homes in the urban areas of the Region is only going to fuel a surge of fresh purchasers to rural properties in every direction.

The COVID-era has helped ignite a flame that has been burning for quite some time and we don't see that fire being extinguished anytime soon.

Q4 | SALES TO
new listing ratio

Between 0.4 and 0.6
is considered a balanced market



0.99

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

| | Q4 2020 | % Chg (Y) | Q4 2019 | % Chg (Q) | Q3 2020 |
|------------------------|-----------|-----------|-----------|-----------|-----------|
| MEDIAN DET. SALE PRICE | \$784,500 | 20.3% ▲ | \$652,000 | 4.6% ▲ | \$750,000 |
| NUMBER OF NEW SALES | 392 | 22.1% ▲ | 321 | 34.5% ▼ | 599 |
| MEDIAN DAYS ON MARKET | 9 | 15 days ▼ | 24 | 2 days ▼ | 11 |
| NEW INVENTORY | 394 | 0.51% ▼ | 396 | 38.1% ▼ | 637 |

UP & DOWN
quick review

- ▲124% Y/Y increase in the Puslinch sales to new listing ratio. The premium placed on perfect country living.
- ▲20% Y/Y jump in Wellesley median detached sale price. One of the hottest products in the Region. Again.
- ▲31% Y/Y spike in the Guelph Eramosa sales to new listing ratio. This kind of fuel pushed median sale prices past the 900k mark.
- ▲21% Y/Y increase in the Centre Wellington median sale price. That 700k mark is right on the horizon.
- ▼15% Y/Y drop in Woolwich new inventory. With demand up, this led to some heavy competition.
- ▼42% Q/Q reduction in Puslinch new inventory. No surprise as short supply led to record high prices.
- ▼6% Q/Q slide in the North Dumfries median sale price. Some rare opportunities outside the city await?
- ▼267% Y/Y reduction in days on market across the Townships. Buyers are jumping quick to jump the city life.

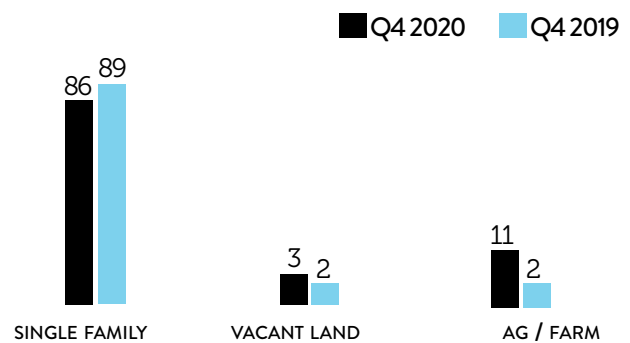
CENTRE WELLINGTON

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$699,900 | 109 | 107 | 1.02 | \$670,000 |
| Q4 2019 TOTAL | \$649,900 | 93 | 92 | 1.01 | \$555,000 |
| % CHANGE (+/-) | 7.7% ▲ | 17.2% ▲ | 16.3% ▲ | 0.99% ▲ | 20.7% ▲ |
| Q3 2020 TOTAL | \$639,000 | 167 | 198 | 0.84 | \$635,000 |
| % CHANGE (+/-) | 9.5% ▲ | 34.7% ▼ | 46% ▼ | 21.4% ▲ | 5.5% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 107 | 89 | ▲ |
| VACANT LAND | 3 | 2 | ▲ |
| AG / FARM | 3 | 1 | ▲ |
| TOTAL | 113 | 92 | ▲ |
| SALES TO NEW RATIO | 1.02 | 1.01 | ▲ |

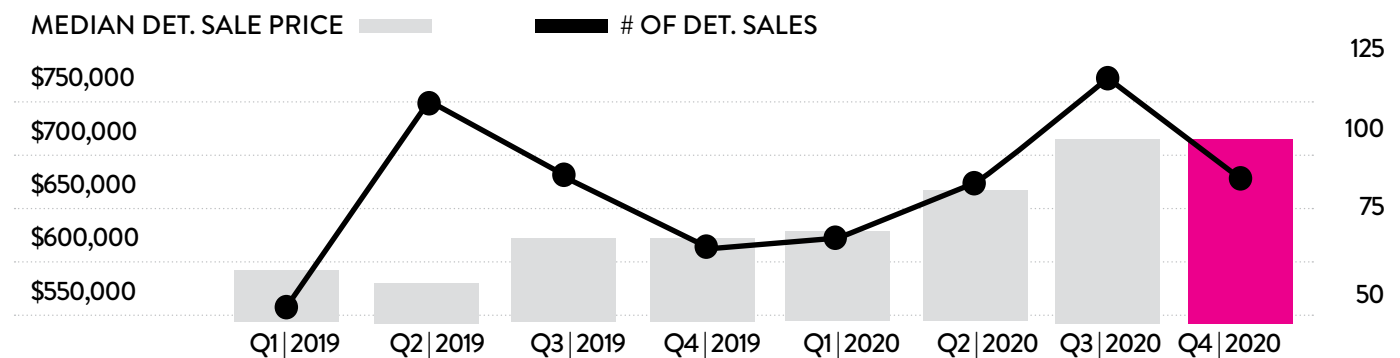
Q4 SALES BY INVENTORY TYPE



\$670,000
SINGLE FAMILY MEDIAN

\$299,900
VACANT LAND MEDIAN

\$2,050,000
AG / FARM MEDIAN



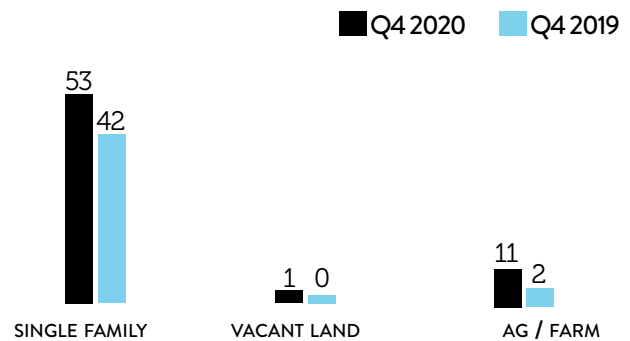
GUELPH ERAMOS

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$887,450 | 53 | 46 | 1.15 | \$915,000 |
| Q4 2019 TOTAL | \$744,900 | 44 | 50 | 0.88 | \$780,000 |
| % CHANGE (+/-) | 19.1% ▲ | 20.4% ▲ | 8% ▼ | 30.7% ▲ | 17.3% ▲ |
| Q3 2020 TOTAL | \$849,900 | 62 | 67 | 0.92 | \$808,500 |
| % CHANGE (+/-) | 4.4% ▲ | 14.5% ▼ | 31.3% ▼ | 25% ▲ | 13.2% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 43 | 43 | = |
| VACANT LAND | 1 | 5 | ▼ |
| AG / FARM | 2 | 2 | = |
| TOTAL | 46 | 50 | ▼ |
| SALES TO NEW RATIO | 1.15 | 0.88 | ▲ |

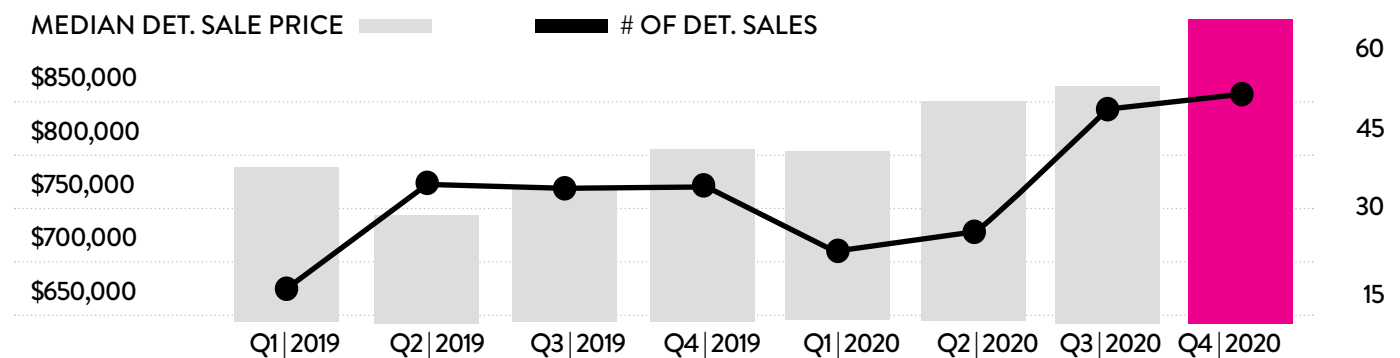
Q4 SALES BY INVENTORY TYPE



\$915,000
SINGLE FAMILY MEDIAN

\$460,000
VACANT LAND MEDIAN

\$2,250,000
AG / FARM MEDIAN



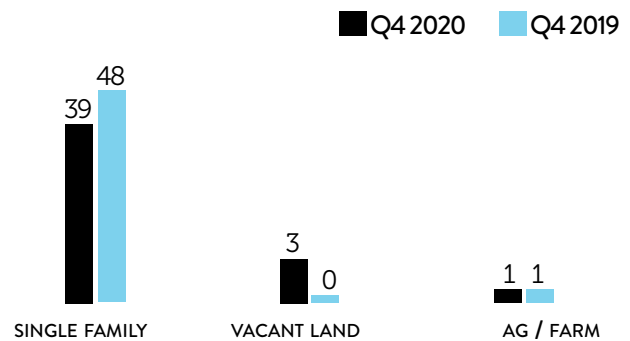
NORTH DUMFRIES

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$600,000 | 43 | 50 | 0.86 | \$624,950 |
| Q4 2019 TOTAL | \$659,900 | 31 | 45 | 0.69 | \$609,900 |
| % CHANGE (+/-) | 9.1% ▼ | 38.7% ▲ | 11.1% ▲ | 24.6% ▲ | 2.5% ▲ |
| Q3 2020 TOTAL | \$694,950 | 69 | 64 | 1.08 | \$662,500 |
| % CHANGE (+/-) | 13.7% ▼ | 37.7% ▼ | 21.9% ▼ | 20.4% ▼ | 5.7% ▼ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 47 | 38 | ▲ |
| VACANT LAND | 3 | 6 | ▼ |
| AG / FARM | 0 | 1 | ▼ |
| TOTAL | 50 | 45 | ▲ |
| SALES TO NEW RATIO | 0.94 | 0.69 | ▲ |

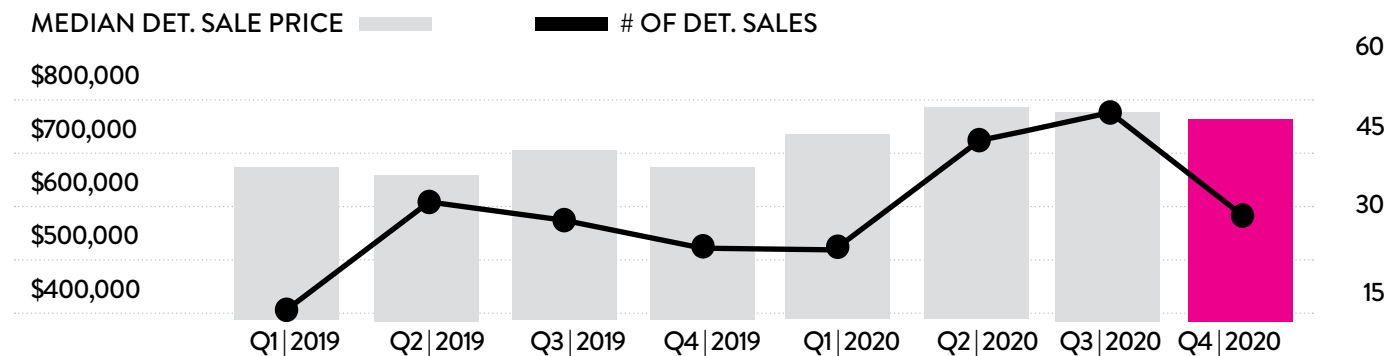
Q4 SALES BY INVENTORY TYPE



\$624,950
SINGLE FAMILY MEDIAN

\$458,000
VACANT LAND MEDIAN

\$1,900,000
AG / FARM MEDIAN



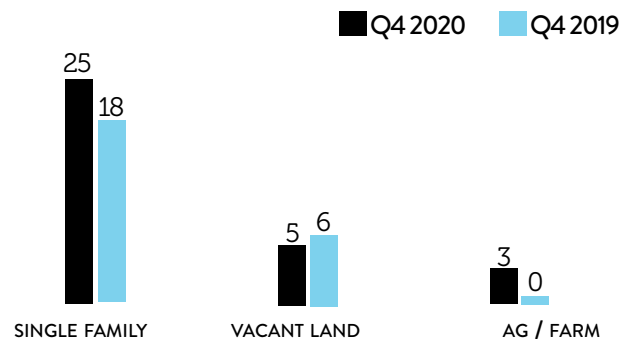
TOWNSHIP OF PUSLINCH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$1,650,000 | 33 | 30 | 1.10 | \$1,650,000 |
| Q4 2019 TOTAL | \$1,350,000 | 24 | 49 | 0.49 | \$755,000 |
| % CHANGE (+/-) | 22.2% ▲ | 37.5% ▲ | 38.8% ▼ | 124% ▲ | 118% ▲ |
| Q3 2020 TOTAL | \$1,415,165 | 49 | 52 | 0.94 | \$982,000 |
| % CHANGE (+/-) | 16.6% ▲ | 32.6% ▼ | 42.3% ▼ | 17% ▲ | 68% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 26 | 39 | ▼ |
| VACANT LAND | 3 | 7 | ▼ |
| AG / FARM | 1 | 3 | ▼ |
| TOTAL | 30 | 49 | ▼ |
| SALES TO NEW RATIO | 1.10 | 0.49 | ▲ |

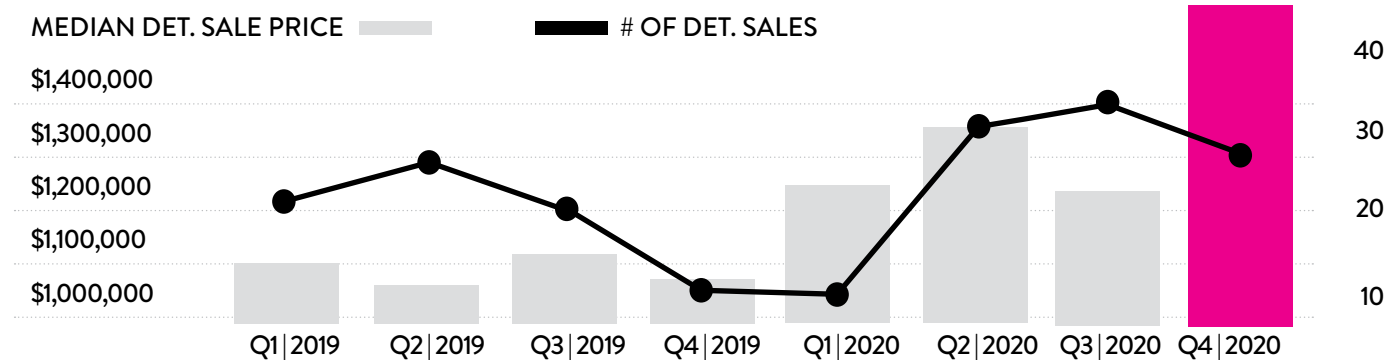
Q4 SALES BY INVENTORY TYPE



\$1,650,000
SINGLE FAMILY MEDIAN

\$452,000
VACANT LAND MEDIAN

\$2,250,000
AG / FARM MEDIAN



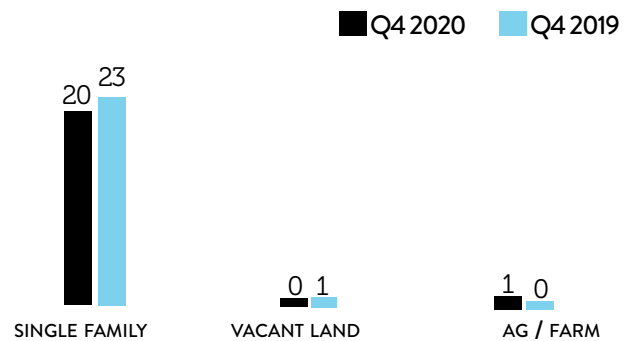
TOWNSHIP OF WELLESLEY

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$677,450 | 21 | 29 | 0.72 | \$759,000 |
| Q4 2019 TOTAL | \$719,000 | 24 | 27 | 0.89 | \$631,000 |
| % CHANGE (+/-) | 5.8% ▼ | 12.5% ▼ | 74% ▲ | 19.1 ▼ | 20.3% ▲ |
| Q3 2020 TOTAL | \$706,950 | 40 | 40 | 1.00 | \$697,000 |
| % CHANGE (+/-) | 4.2% ▼ | 47.5% ▼ | 27.5% ▼ | 28% ▼ | 8.9% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 29 | 27 | ▲ |
| VACANT LAND | 0 | 0 | = |
| AG / FARM | 0 | 0 | = |
| TOTAL | 29 | 27 | ▲ |
| SALES TO NEW RATIO | 0.72 | 0.89 | ▲ |

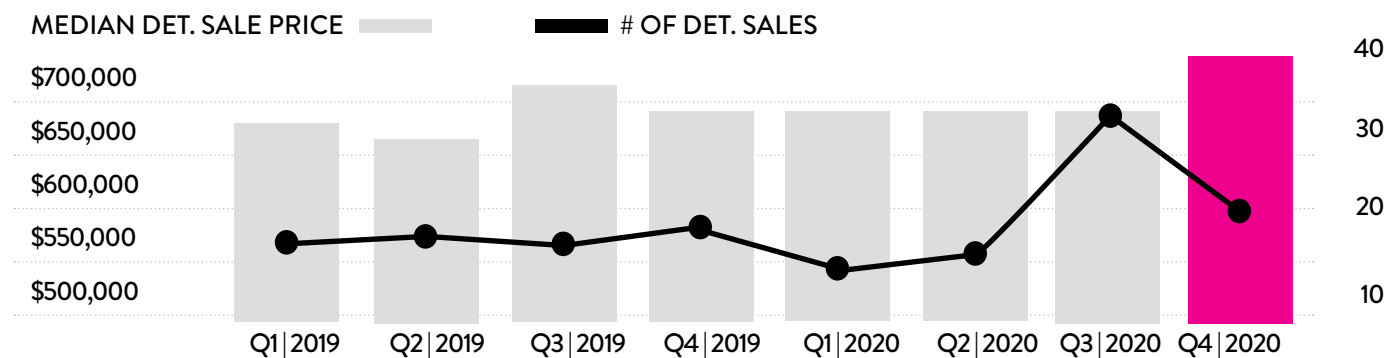
Q4 SALES BY INVENTORY TYPE



\$759,000
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$2,950,000
AG / FARM MEDIAN



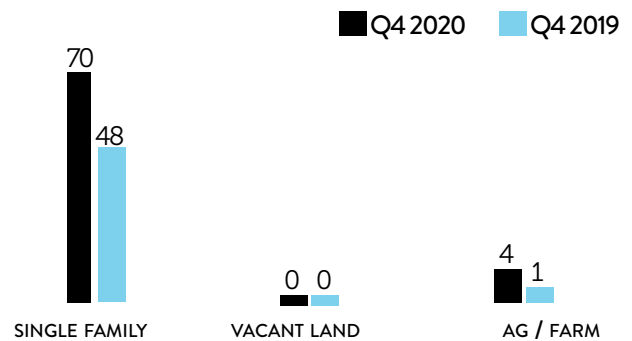
TOWNSHIP OF WILMOT

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$675,000 | 74 | 73 | 1.01 | \$712,500 |
| Q4 2019 TOTAL | \$649,900 | 49 | 52 | 0.94 | \$597,500 |
| % CHANGE (+/-) | 3.9% ▲ | 51% ▲ | 40.4% ▲ | 74% ▲ | 19.2% ▲ |
| Q3 2020 TOTAL | \$650,000 | 116 | 112 | 1.03 | \$672,000 |
| % CHANGE (+/-) | 3.8% ▲ | 36.2% ▼ | 34.8% ▼ | 1.9% ▼ | 6% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 72 | 48 | ▲ |
| VACANT LAND | 1 | 1 | = |
| AG / FARM | 0 | 3 | ▼ |
| TOTAL | 73 | 52 | ▲ |
| SALES TO NEW RATIO | 1.01 | 0.94 | ▲ |

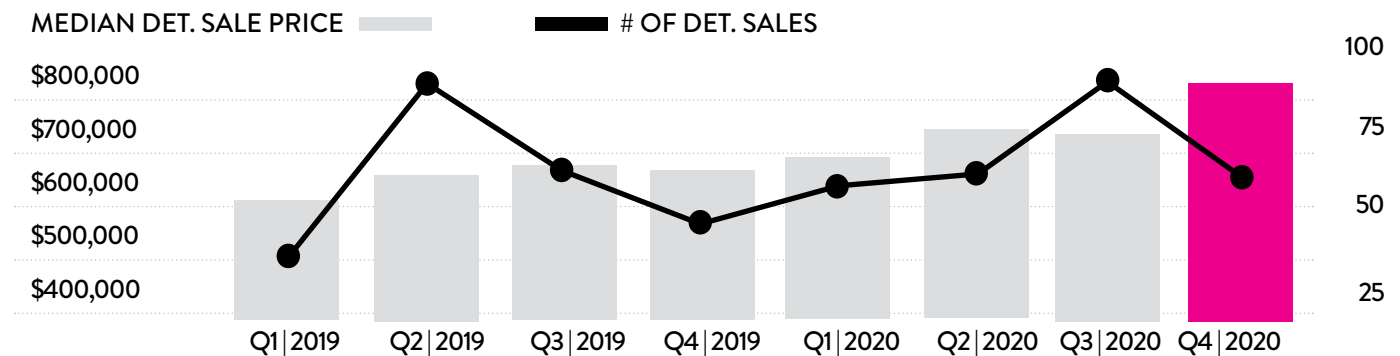
Q4 SALES BY INVENTORY TYPE



\$712,500
SINGLE FAMILY MEDIAN

N/A
VACANT LAND MEDIAN

\$2,075,000
AG / FARM MEDIAN



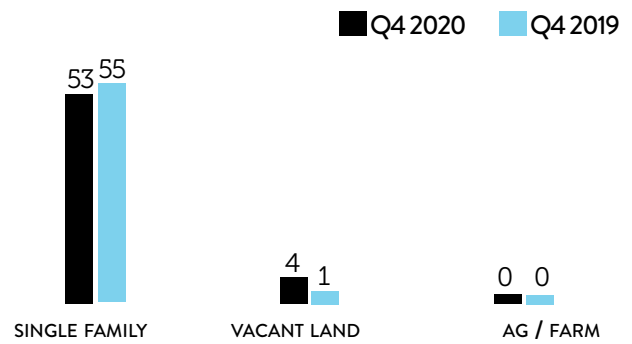
TOWNSHIP OF WOOLWICH

| | MEDIAN LIST PRICE | NUMBER OF SALES | NEW INVENTORY | SALES/NEW RATIO | MEDIAN SALE PRICE |
|-----------------|-------------------|-----------------|---------------|-----------------|-------------------|
| Q4 2020 TOTAL | \$699,900 | 57 | 69 | 0.82 | \$658,250 |
| Q4 2019 TOTAL | \$679,900 | 56 | 81 | 0.69 | \$575,000 |
| % CHANGE (+/-) | 2.9% ▲ | 1.8% ▲ | 14.8% ▼ | 18.8% ▲ | 14.5% ▲ |
| Q3 2020 TOTAL | \$654,950 | 96 | 104 | 0.92 | \$642,500 |
| % CHANGE (+/-) | 6.9% ▲ | 40.6% ▼ | 33.6% ▼ | 10.9% ▼ | 2.4% ▲ |

Q4 NEW INVENTORY

| | Q4 2020 | Q4 2019 | TREND |
|--------------------|---------|---------|-------|
| SINGLE FAMILY | 65 | 73 | ▼ |
| VACANT LAND | 4 | 4 | = |
| AG / FARM | 0 | 4 | ▼ |
| TOTAL | 69 | 81 | ▼ |
| SALES TO NEW RATIO | 0.82 | 0.69 | ▲ |

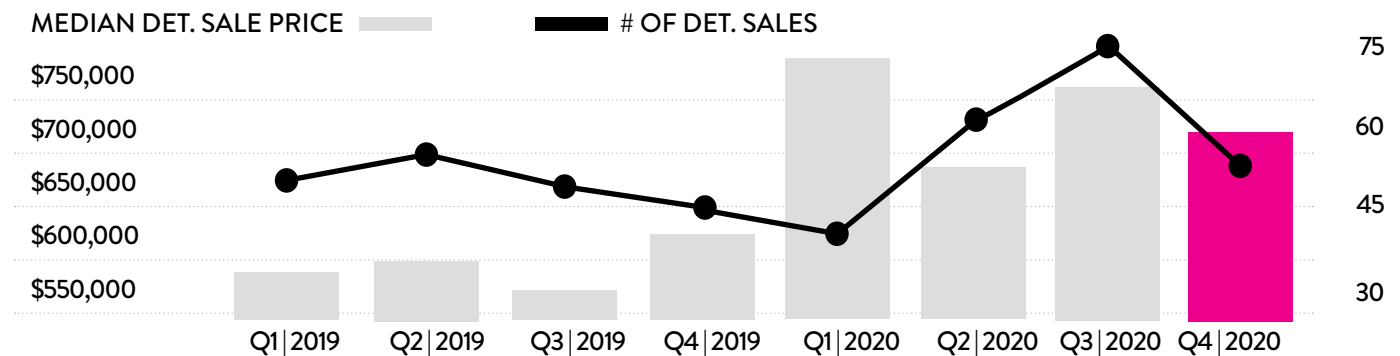
Q4 SALES BY INVENTORY TYPE



\$658,250
SINGLE FAMILY MEDIAN

\$1,115,000
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

