

COMPASS

September 2026 San Francisco House & Condo Market Outlook

Data through August 2026

Market
Research
COMPASS INTERNATIONAL HOLDINGS

San Francisco remained the region's strongest performer in August with 24% year-over-year price appreciation.

Elsewhere across the region, Marin and Napa posted 12% year-over-year appreciation, while Contra Costa and San Mateo rose 5%. Alameda remained unchanged, while Santa Clara, Santa Cruz, Sonoma, and Monterey recorded declines ranging from 2% to 11%.

YoY Price Depreciation  YoY Price Appreciation
-11% 0% 24%



September 2026

Housing Market Report

August marked a broad seasonal cooling across the Bay Area. Closings declined year over year in 13 of 14 counties and month over month in 12, while months of supply increased from July in 13 counties. The shift reflects the typical late-summer slowdown as the market transitions from the spring/summer peak toward the fall market peak.

Competition remained stronger than a year ago. The share of sales closing above list increased year over year in all 14 counties, while average days on market improved in 11. Price reductions increased in 10 counties, consistent with the seasonal rise in listing adjustments as the market moves toward fall and winter.

Single-family homes continued to show stronger market conditions than condos. Single-family closings fell year over year in nine counties but increased in five, and days on market declined in 13. The share of sales closing above list increased across every county. By contrast, condo price reductions increased in 12 counties, while condo days on market rose in six — signaling a more uneven recovery.

Condo momentum appears to be moderating after a strong summer. The condo median increased year over year in six counties and declined in eight, while the share of condos selling above list rose in only eight. August is the first month of data following new condo lending regulations, so it is too early to determine whether the slowdown reflects the regulations or the normal late-summer seasonal pattern.

San Francisco remains the regional standout. Condo sales increased 11% year over year to 214, the condo median rose 22% to \$1.23 million, and active condo listings fell 36%. San Francisco was the only county where condos showed both meaningful price and closed transaction growth.

September watch: The strongest appreciation outside San Francisco was concentrated north of the city, with Marin posting the region's second-highest year-over-year gain. Condo sales and pricing will be closely watched to determine whether August's slowdown is temporary or the beginning of a broader shift. The performance of smaller versus larger condo buildings will also be important, particularly as the impact of the new lending regulations becomes clearer. Atherton's nearly \$10 million increase in its median price, driven by a few high-value sales, will be another notable test of whether recent gains will be sustained.



San Francisco Market

Report created in good faith using public and proprietary data from sources deemed reliable but may contain errors and is subject to revision. Data is pulled at the end of the month, and last-period figures may still be preliminary due to late-reported activity. All numbers are approximate and may change, including Private Exclusive sales and other transactions not publicly reported at the time of publication.



How to Read This Report:

County and Submarket Guidance

Data quality. San Francisco closed 150 single-family sales and 218 condo sales in August—strong bases for both cohorts. Single-family data are reliable. Condo data (218 closings) are robust for county-level analysis. However, the report notes that no single San Francisco neighborhood cleared ten single-family closings in both August 2026 and August 2025; neighborhood-level detail is condo-only and should not be read as a complete neighborhood market picture.

Inventory collapse. San Francisco's active inventory fell 35% year-over-year (570 combined listings) and 36% for condos (411 vs 642). This is the sharpest inventory decline in the region and is directional and real—the market tightened dramatically. The decline is consistent with the city's tight housing, high prices, and constrained supply.

Price strength amid tightness. The condo median rose 22.3% (\$1.23M vs \$1.01M)—one of the largest YoY gains in the region. This suggests that despite lower inventory and slower sales (-23.5% MoM), prices held firm and climbed, a pattern consistent with sustained demand overwhelming tight supply. Do not interpret lower sales velocity as weak demand; interpret it as a thin market where fewer deals transact at higher prices.

Single-family scarcity. Single-family closed sales fell 35% YoY (150 vs 232), and the median rose 4% to \$1.755M. Days-on-market fell from 35 to 27 days—faster liquidity despite lower volume. This is consistent with a high-priced, low-volume market where scarcity and wealth concentrate demand.

Neighborhood complexity. San Francisco's 59 neighborhoods vary sharply in composition, price, and character. Aggregate metrics mask this dispersion. The condo-only neighborhood analysis is more reliable than county totals for understanding micro-markets.

Omissions. Single-family neighborhood analysis are avoided due to insufficient closings; only condo neighborhoods meet the 10 closing per month threshold. This reflects the city's composition: most single-family sales are custom/renovation properties, fewer in number but larger in price. Condo sales are higher-volume.

Guidance. San Francisco's tightening inventory and price strength are genuine. The sales-velocity decline does not indicate weakness—it reflects a constrained market. Use the condo neighborhood data for granular analysis; treat the county single-family figures as indices of a small, expensive market.



San Francisco Recap

Sales: 150 single-family homes closed, down 9% YoY and 16% MoM. Condo closings rose 11% YoY to 214 but fell 25% from July.

Prices: Single-family median increased 24% YoY to \$1.855M, while the condo median rose 22% to \$1.233M. Price per square foot increased 19% for both.

Competition: 85% of single-family sales closed above list, up 18 points YoY—the largest gain in the report. Condo overbidding rose 31 points to 54%.

Speed: Single-family days on market fell from 30 to 21 days, while condos improved from 60 to 44 days.

Inventory: Combined active listings plunged 35% YoY to 570 despite a 10% increase in new listings. Single-family actives fell 31% and condos 36%.

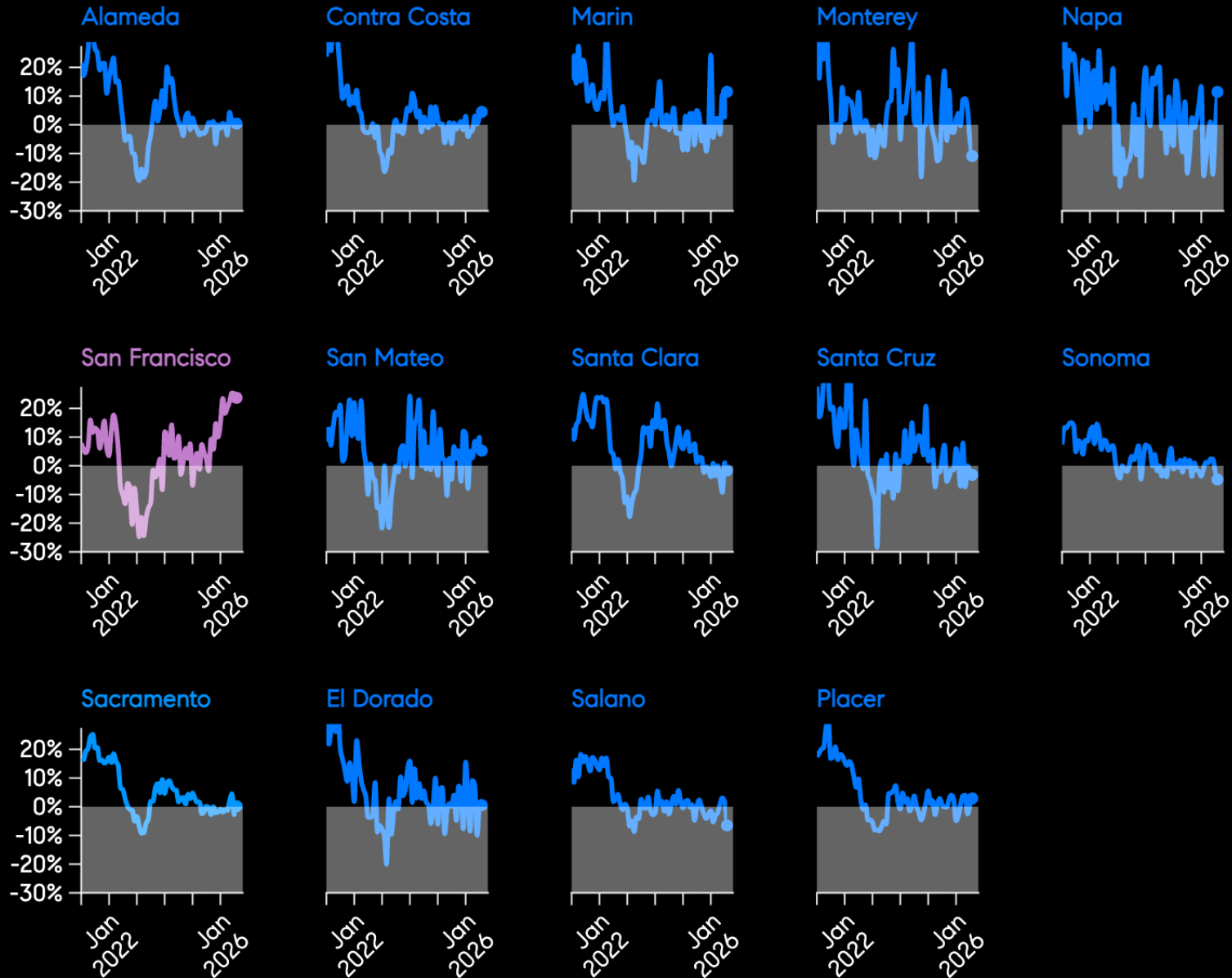
Single family: Listings in contract increased 6% to 169 versus only 157 active listings. Absorption reached 108%, while months of supply fell to just 1.0.

Condos: Absorption improved 21 points to 56%, and months of supply declined from 3.3 to 1.9. MoM: Total closings fell 21%, the largest decline among the counties, but new listings rose 7% and contracts increased 8%. Single-family absorption jumped 17 points.

Bottom line: San Francisco remains the most competitive market in the group. Extremely limited inventory is constraining single-family sales despite strong demand, while condos have also tightened substantially year over year.

Home Price Changes Over Time

Median sales prices in San Francisco County increased 23.67% compared with last August.



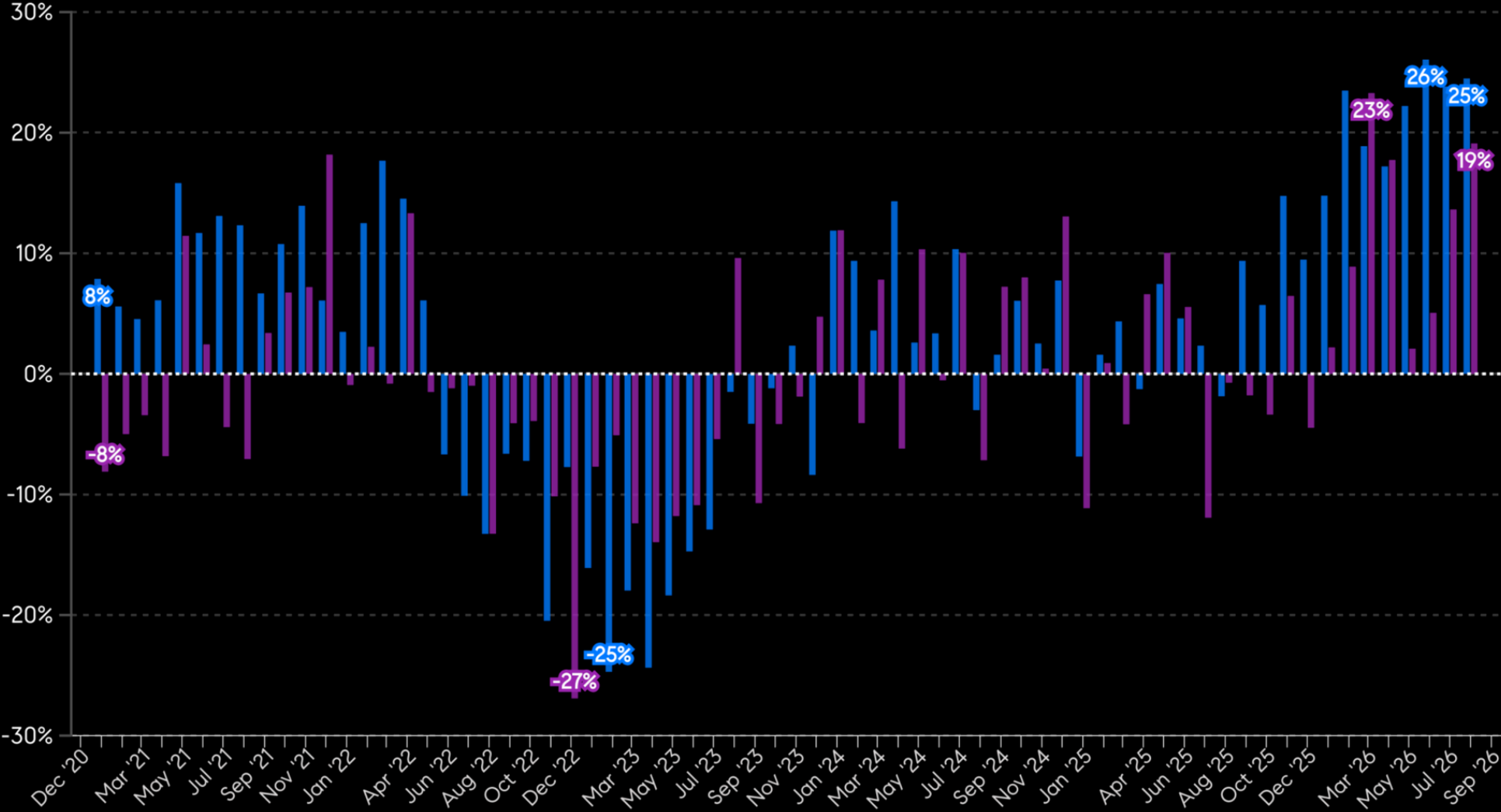
Source: Compass via MLS data • Median sales price for single family homes, change vs same month 1 year prior

COMPASS INTERNATIONAL HOLDINGS

Median Price Year Over Year Change

San Francisco County ▾

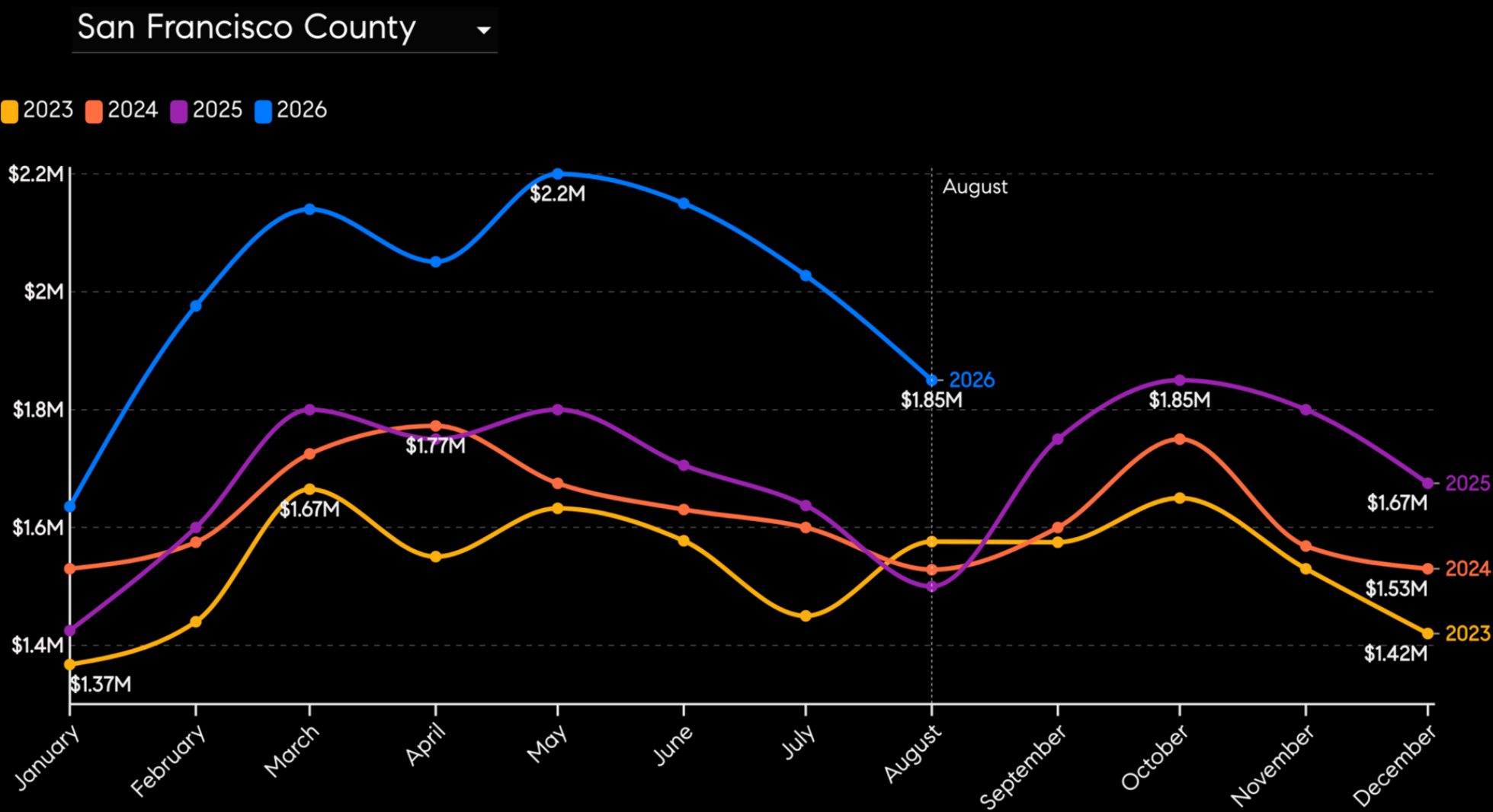
■ Median Sale Price YoY% - SF ■ Median Sale Price YoY% - Condo



Median Sale Price

Single Family Homes

Each line represents a different year, making it easy to compare seasonal trends.

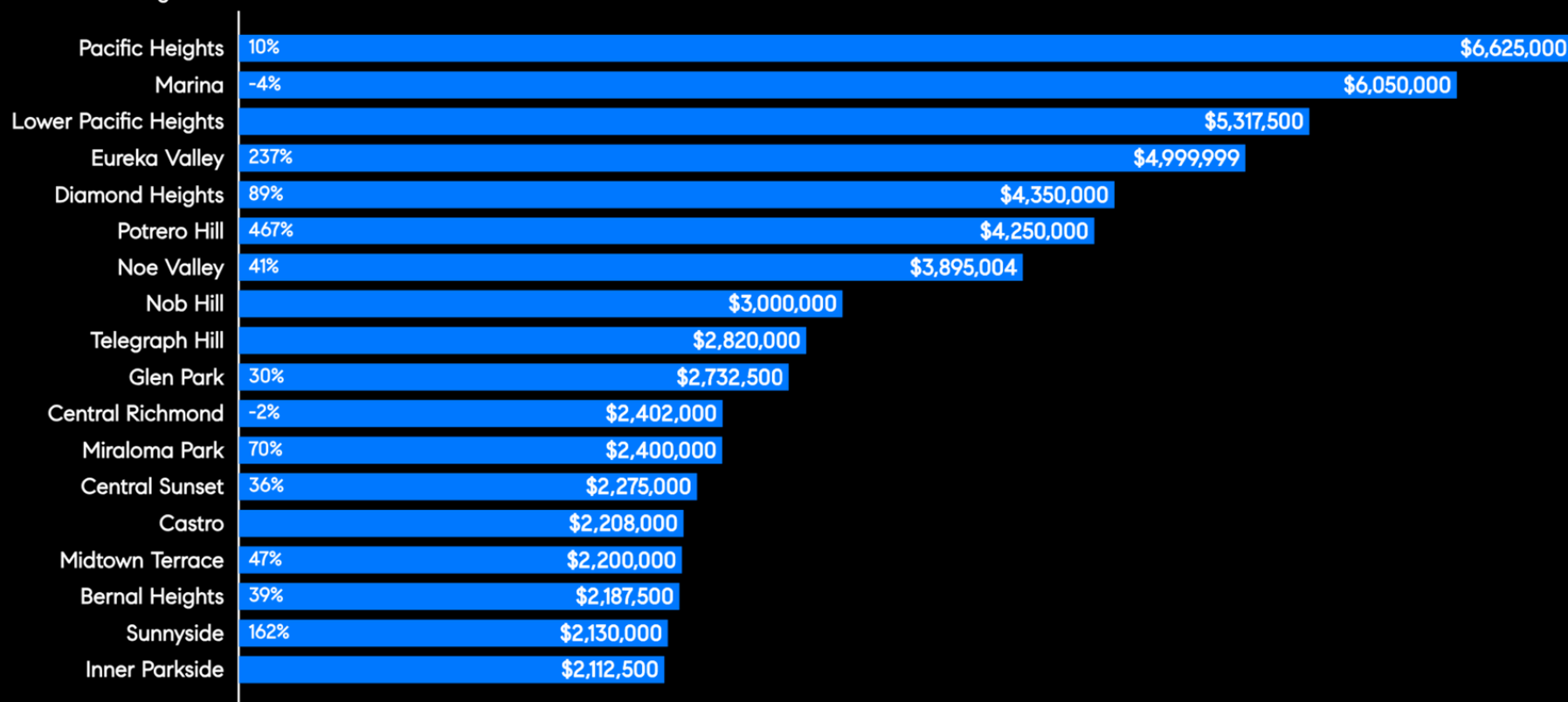


August Median Sale Price

Single Family Homes

San Francisco County ▾

Year over Year % Change



Source: Compass via MLS · Single Family Homes

Median Sale Price: The sale price at the 50th percentile of all closed transactions during the month, meaning half of homes sold for more and half sold for less. A low number of transactions can skew the median dramatically

COMPASS INTERNATIONAL HOLDINGS

August Median Sale Price

Single Family Homes

San Francisco County ▾

Year over Year % Change

Central Waterfront-Dogpatch		\$2,100,000
Outer Richmond	31%	\$1,960,000
Outer Parkside	11%	\$1,908,000
Golden Gate Heights	-19%	\$1,905,000
Outer Sunset	26%	\$1,882,500
Parkside	11%	\$1,860,000
Inner Mission	28%	\$1,712,000
Ingleside	36%	\$1,515,000
Portola	22%	\$1,402,500
Outer Mission	30%	\$1,300,000
Mission Terrace	5%	\$1,290,000
Ingleside Heights	-24%	\$1,220,000
Crocker Amazon	-5%	\$1,170,000
Silver Terrace	25%	\$1,125,000
Visitacion Valley	11%	\$1,070,000
Excelsior	-21%	\$990,000
Bayview	3%	\$974,444

Source: Compass via MLS · Single Family Homes

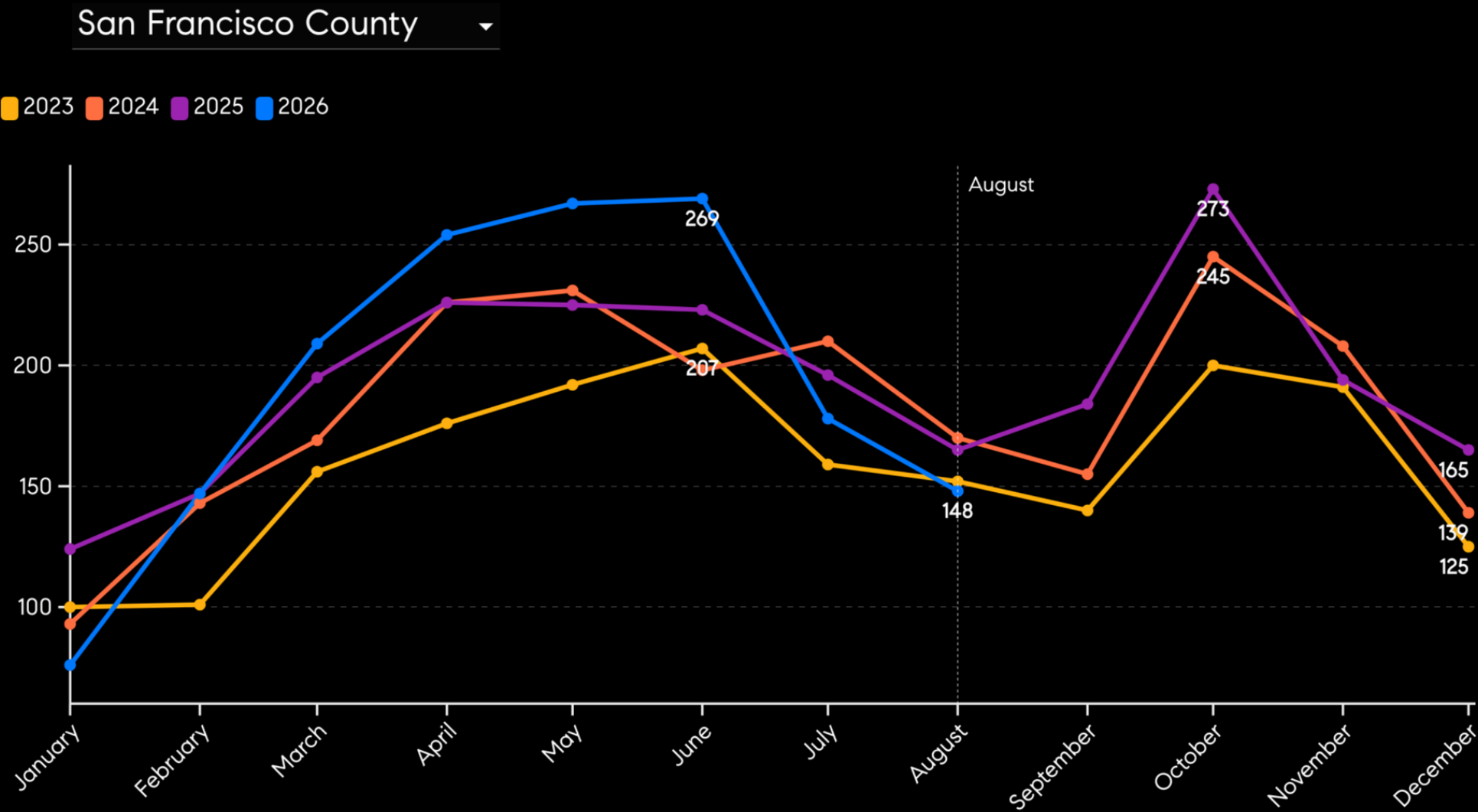
Median Sale Price: The sale price at the 50th percentile of all closed transactions during the month, meaning half of homes sold for more and half sold for less. A low number of transactions can skew the median dramatically

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Closed Sales per Month

Single Family Homes

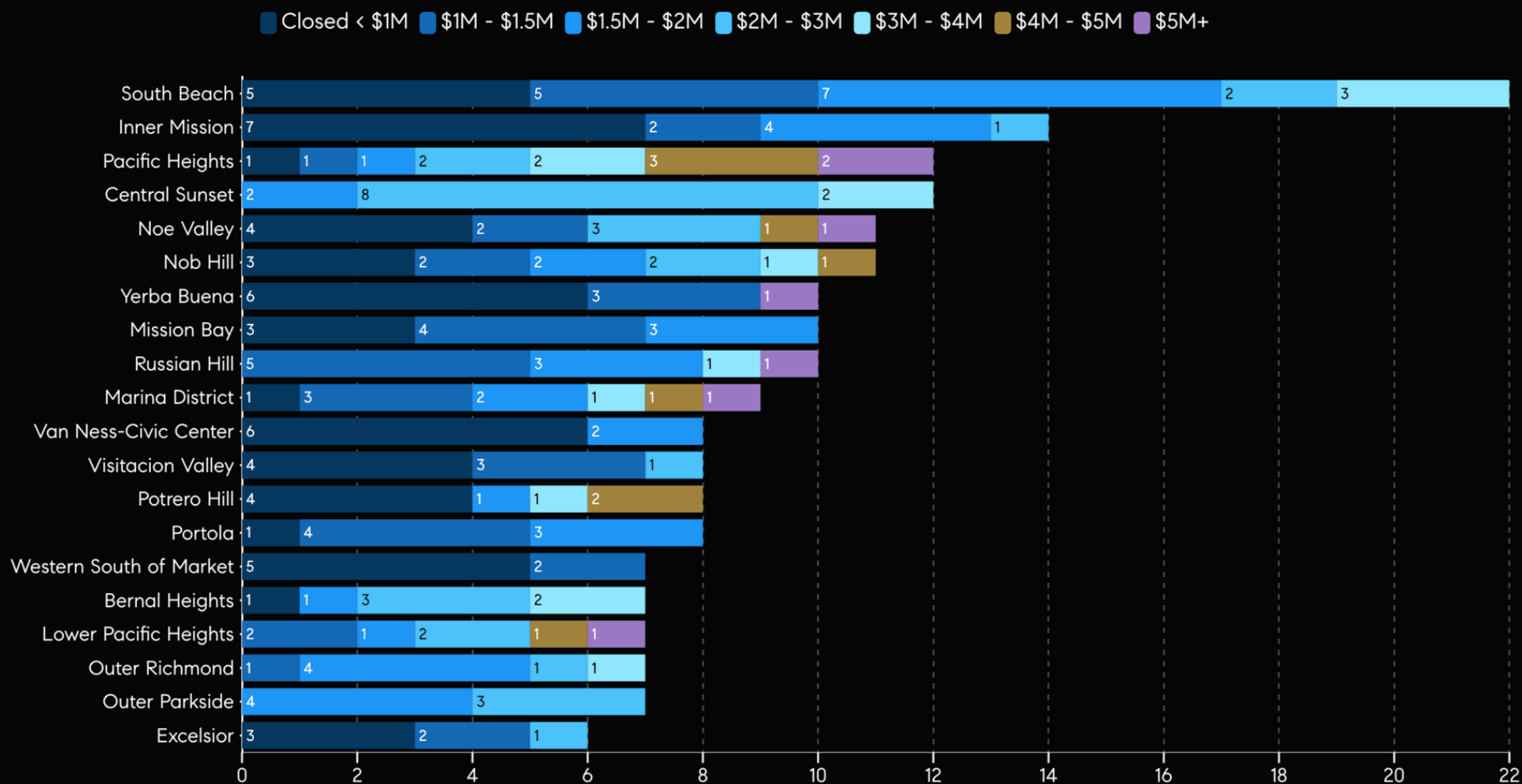
Each line is a different year, making it easy to compare seasonal trends



August Closed Sales by Price Segment

Single Family Homes and Condos

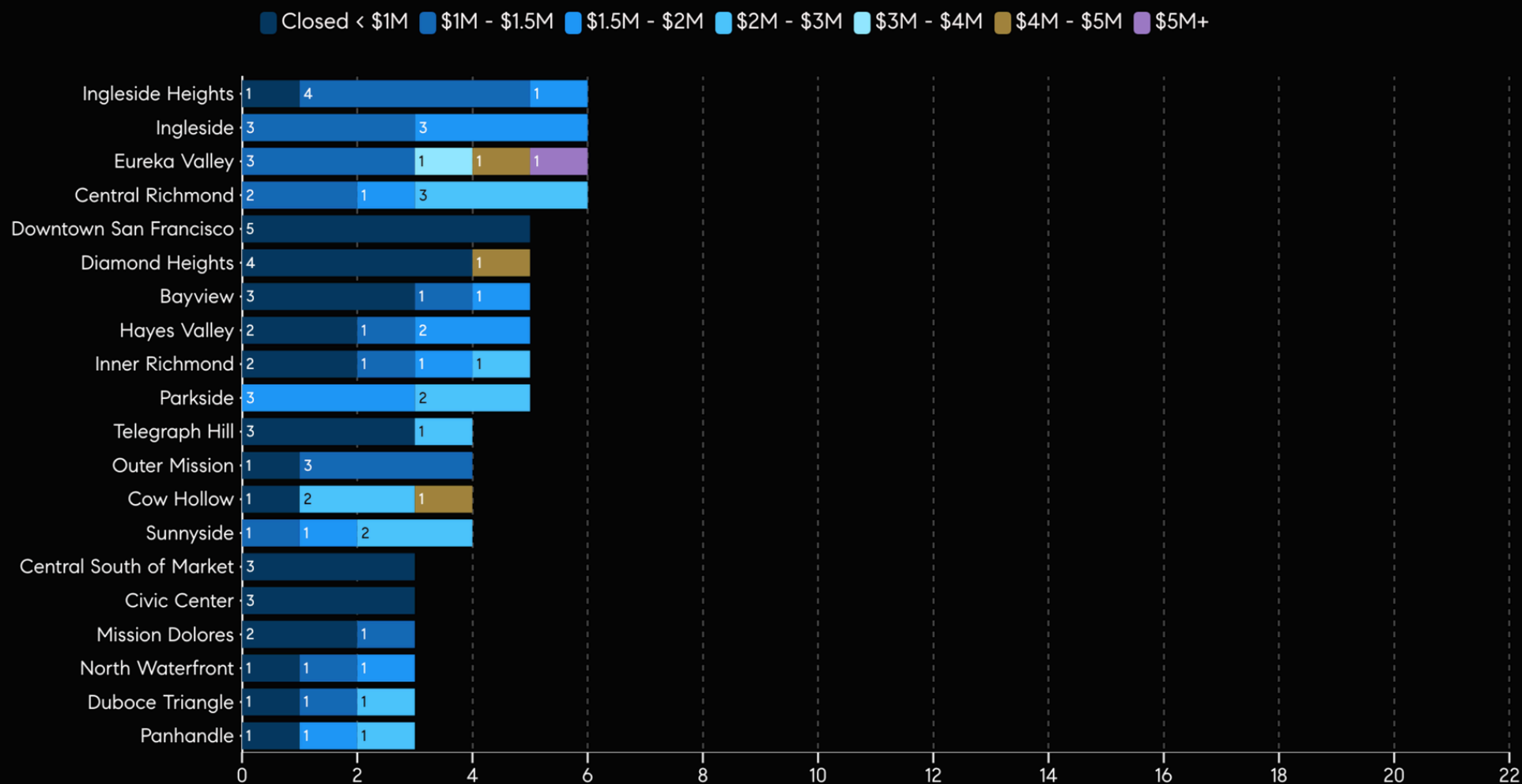
San Francisco County ▾



August Closed Sales by Price Segment

Single Family Homes and Condos

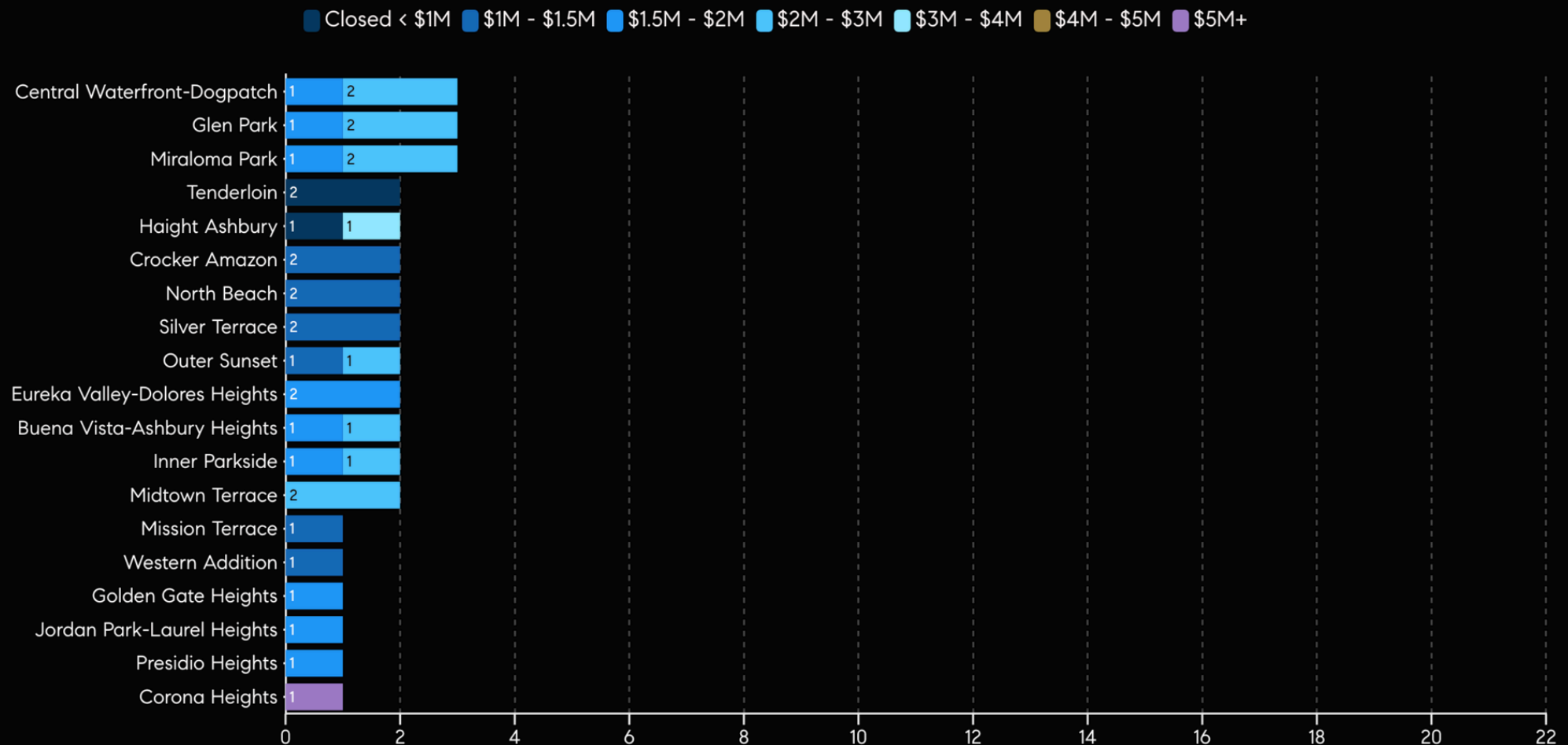
San Francisco County ▾



August Closed Sales by Price Segment

Single Family Homes and Condos

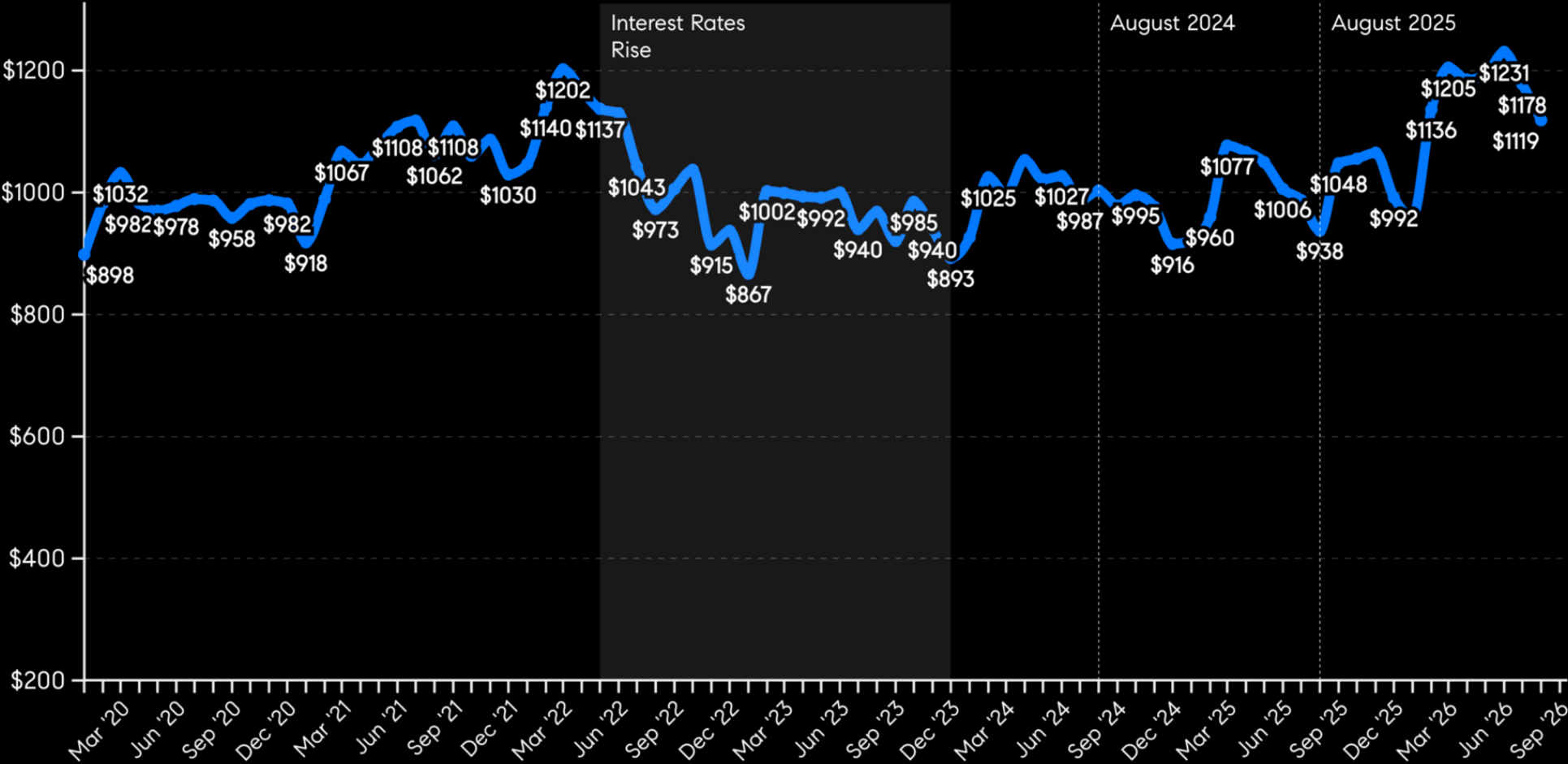
San Francisco County ▾



Median Price Per Square Foot by Month

Single Family Homes

San Francisco County ▾

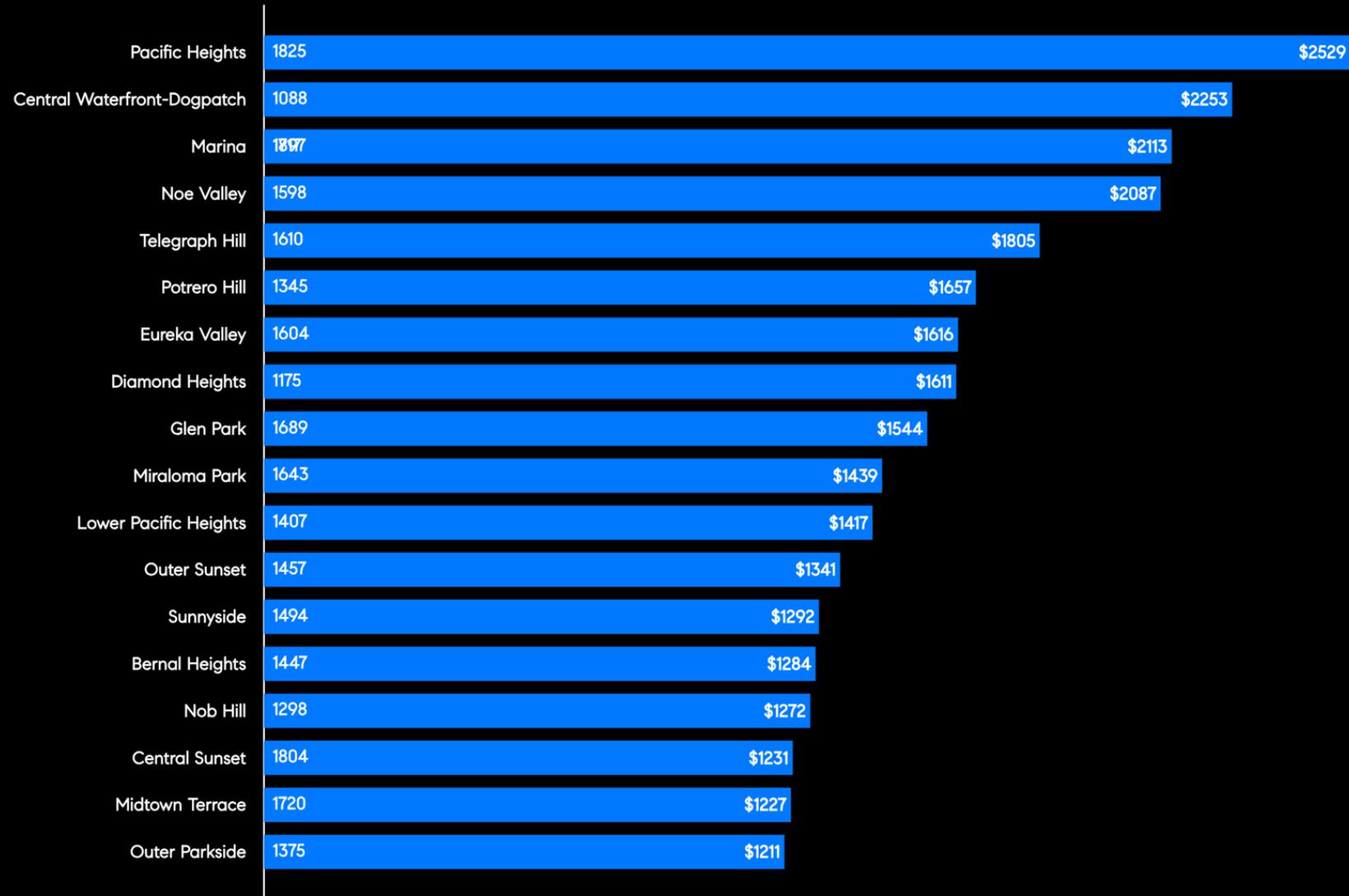


August Median Price Per Square Foot

Single Family Homes

San Francisco County ▾

Median Square Feet



Source: Compass via MLS • Single Family Homes
Median Price per Square Foot: The 50th percentile of sale price per square foot across all closed transactions during the month

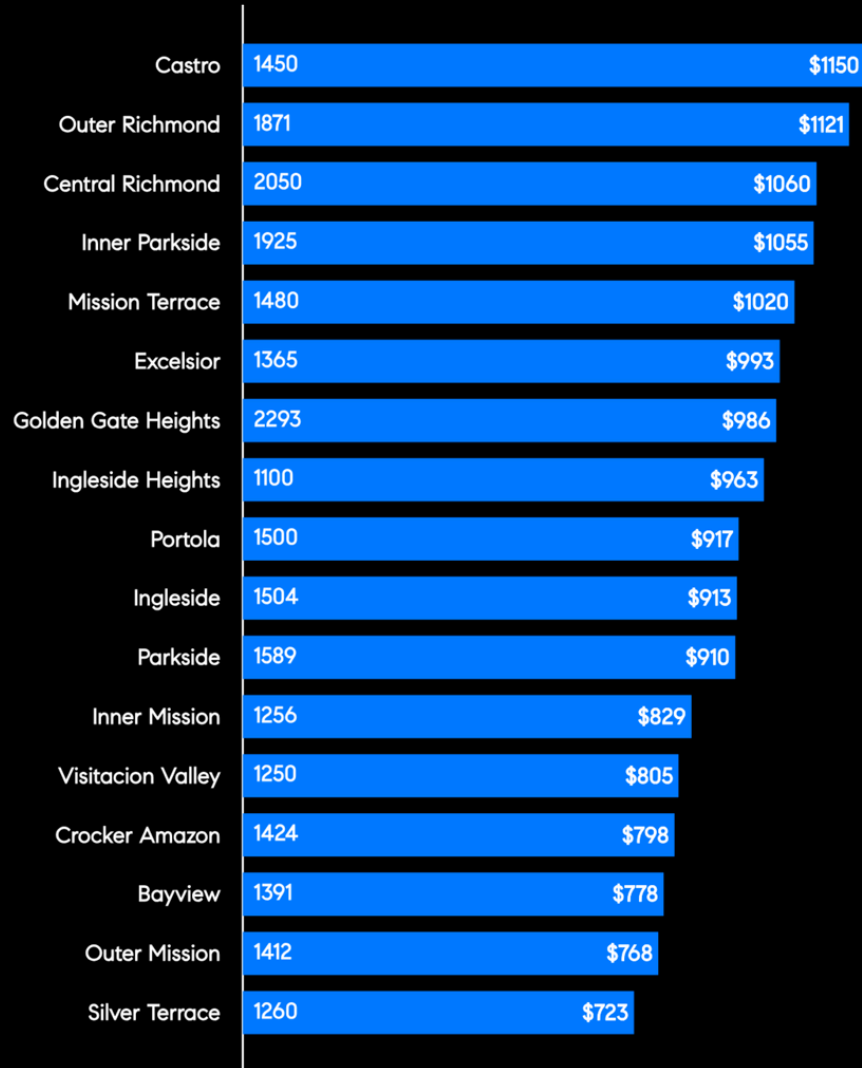
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August Median Price Per Square Foot

Single Family Homes

San Francisco County ▾

Median Square Feet



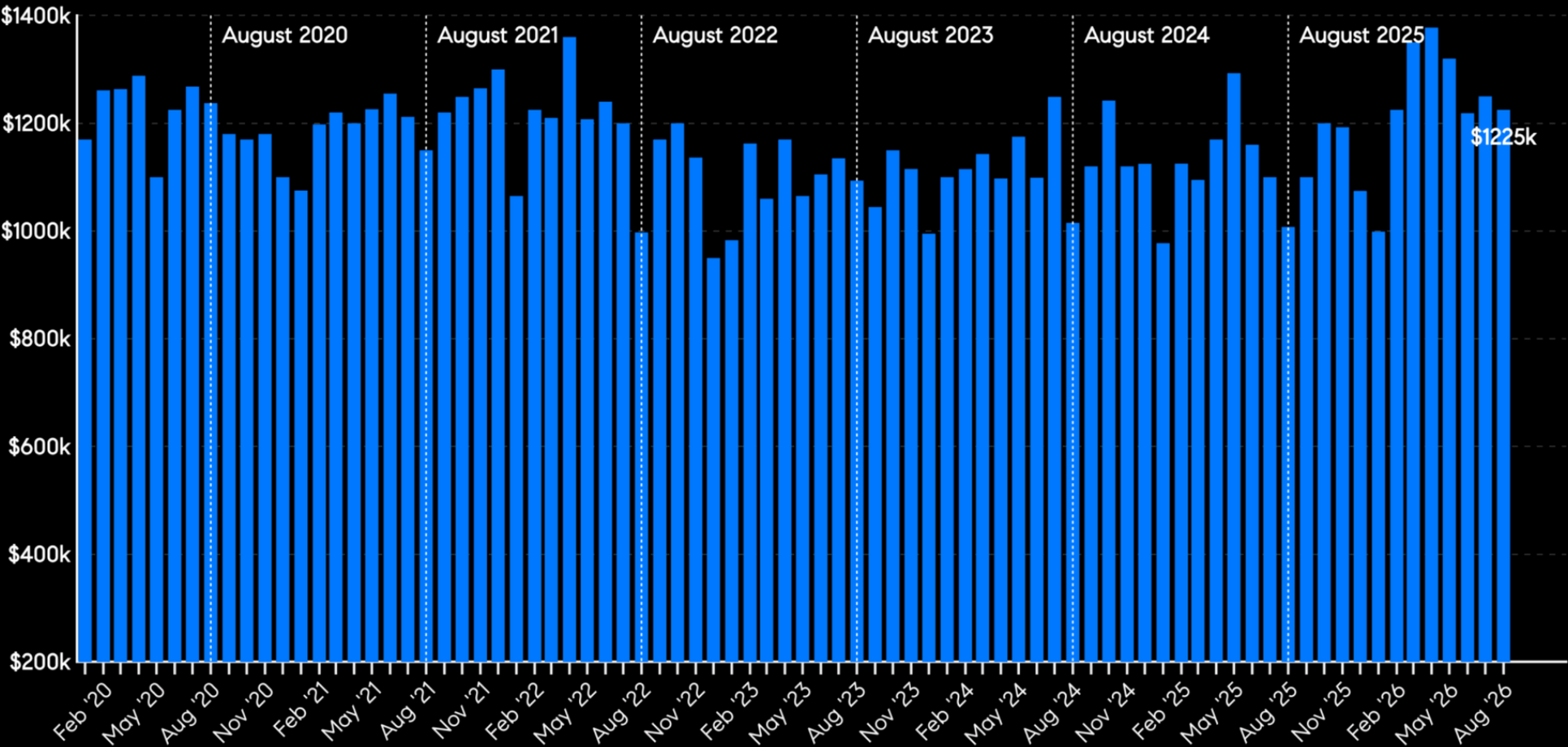
Source: Compass via MLS · Single Family Homes
Median Price per Square Foot: The 50th percentile of sale price per square foot across all closed transactions during the month

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Median Sale Price

Condos

Napa County ▾

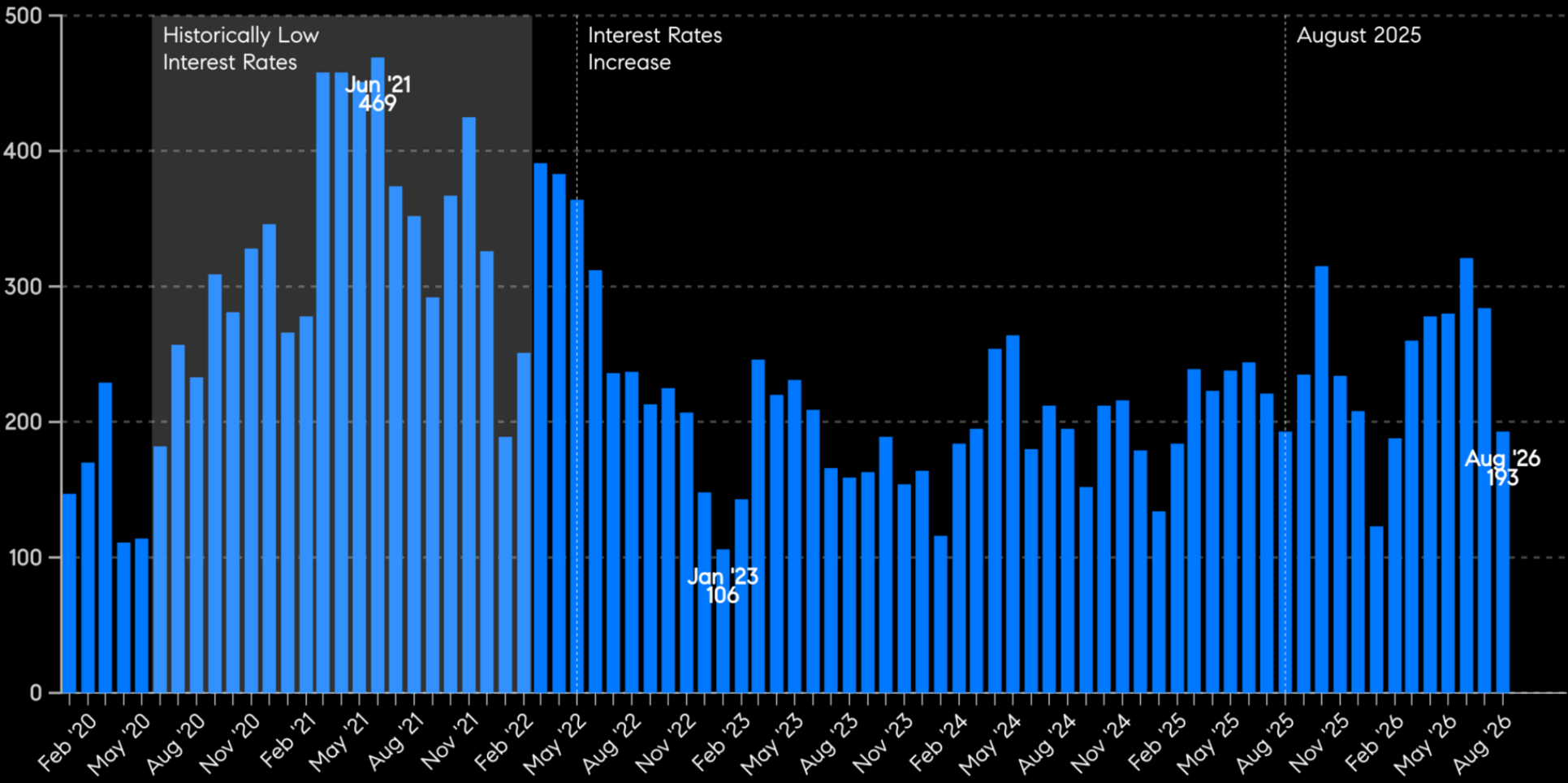


Source: Compass via MLS data · Condos
Median Sale Price: The sale price at the 50th percentile of all closed transactions during the month, meaning half of homes sold for more and half sold for less. A low number of transactions can skew the median dramatically

Closed Sales

Condos

San Francisco County ▾

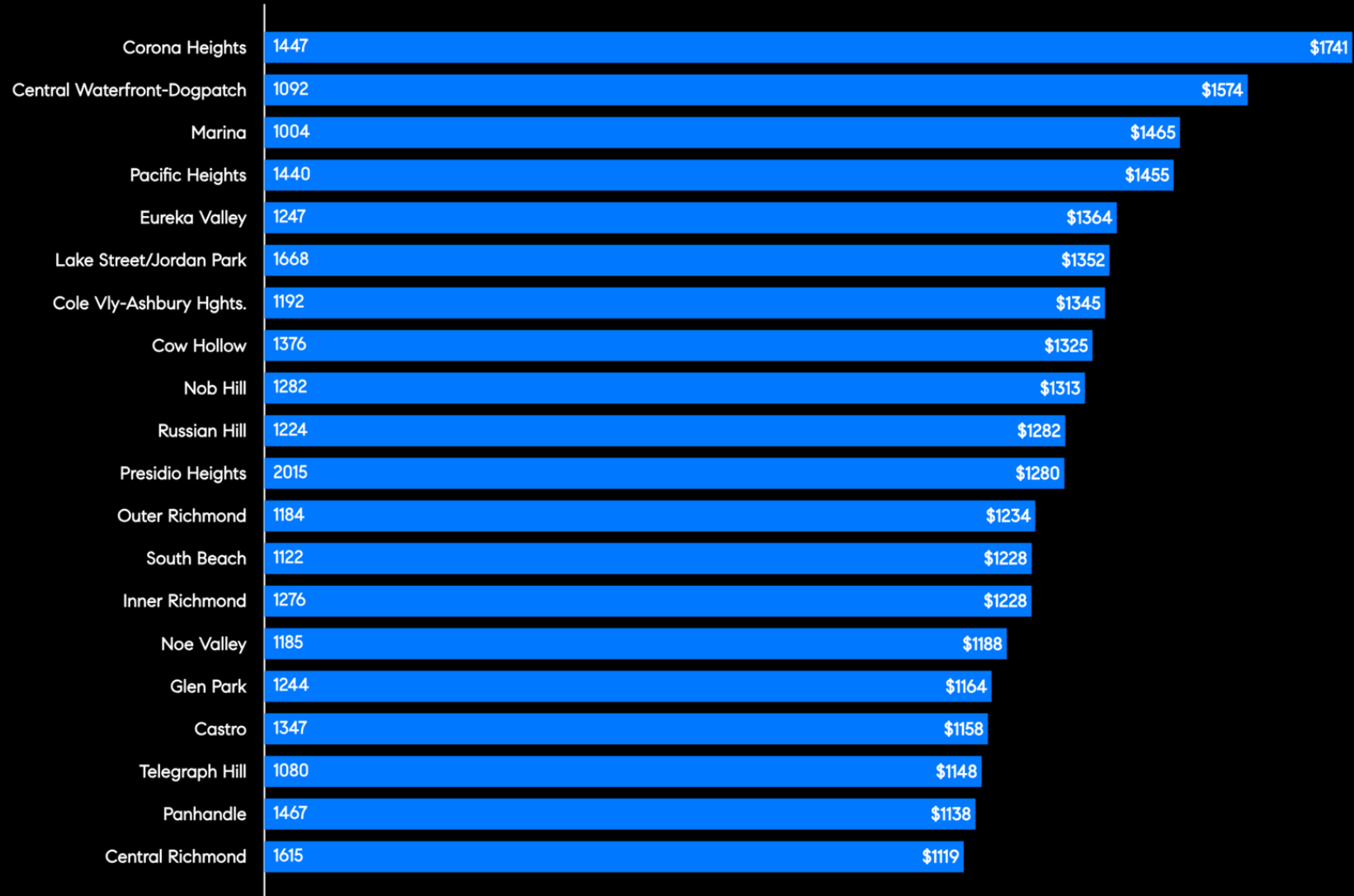


August Median Price Per Square Foot

Condos

San Francisco County ▾

Median Square Feet



Source: Compass via MLS · Condos
Median Price per Square Foot: The 50th percentile of sale price per square foot across all closed transactions during the month

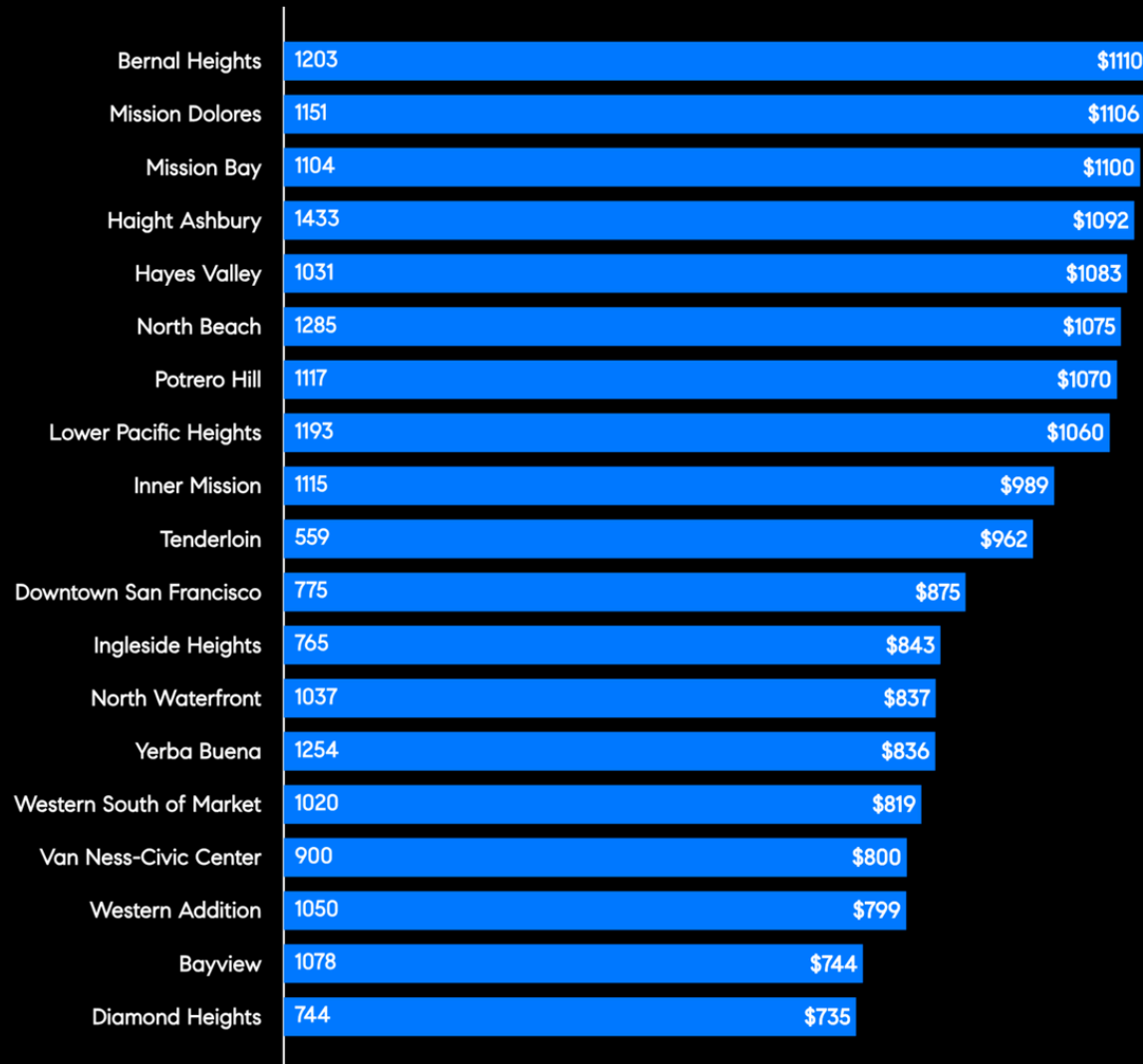
COMPASS INTERNATIONAL HOLDINGS

August Median Price Per Square Foot

Condos

San Francisco County ▾

Median Square Feet



Source: Compass via MLS - Condos
Median Price per Square Foot: The 50th percentile of sale price per square foot across all closed transactions during the month

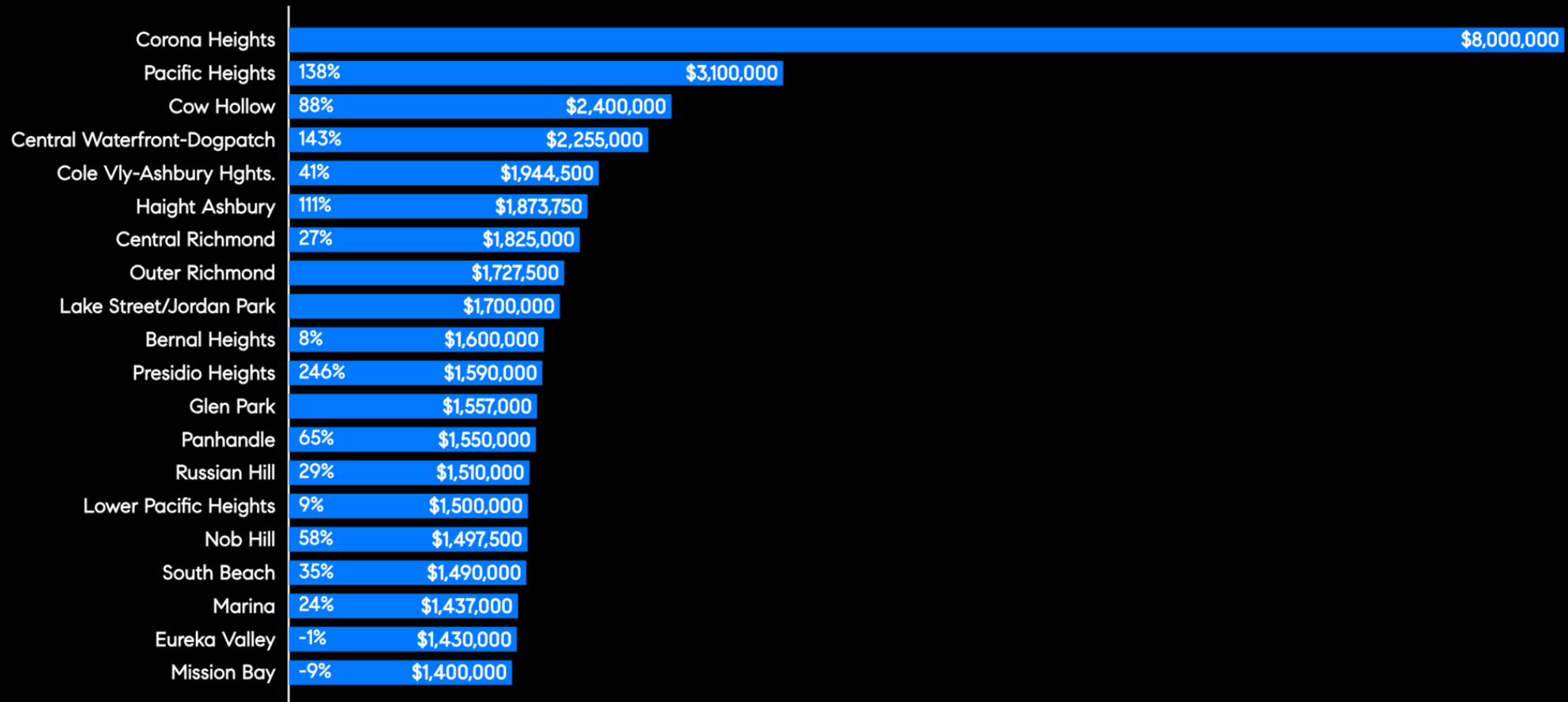
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August Median Sale Price

Condos

San Francisco County ▾

Year over Year % Change



Source: Compass via MLS · Condos

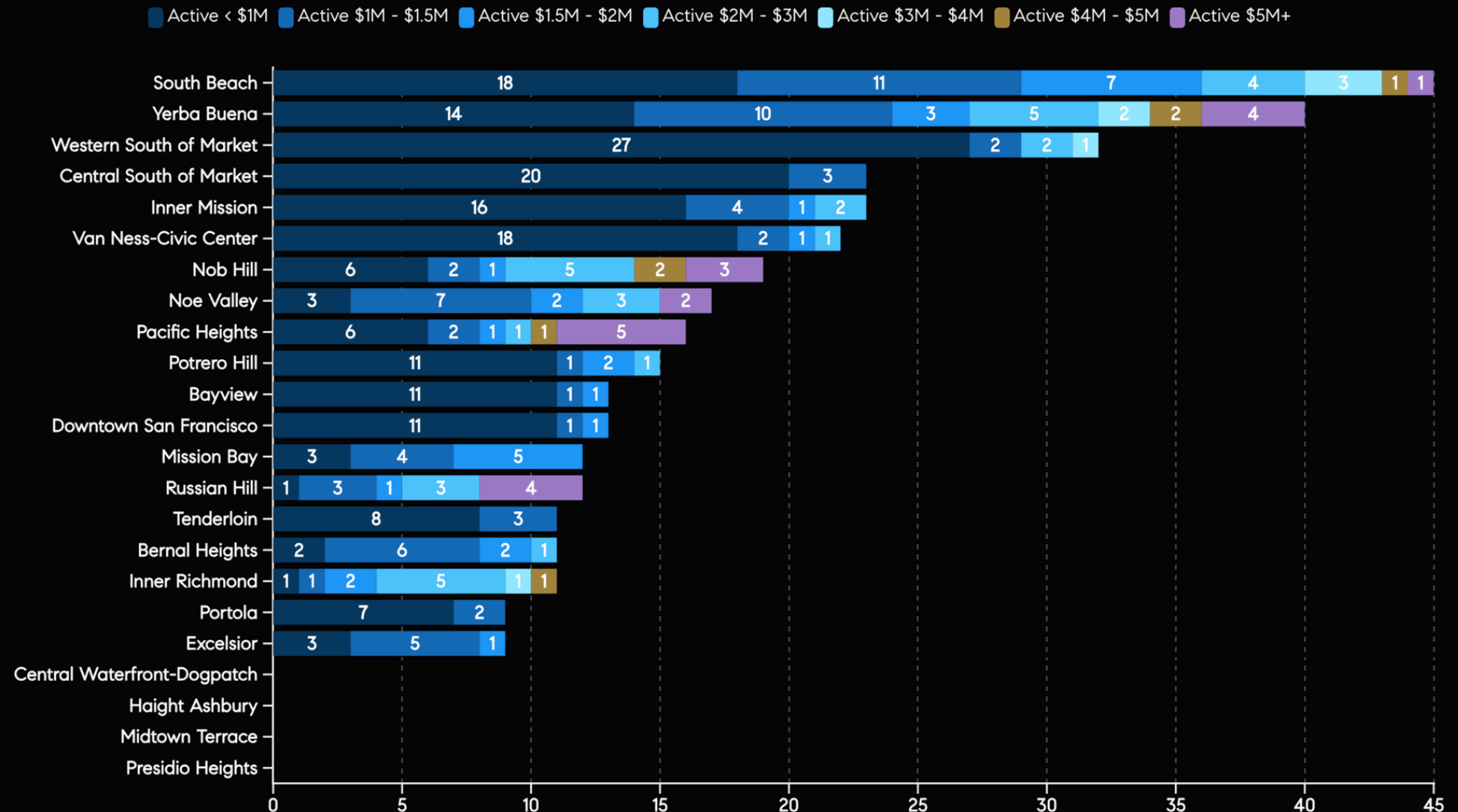
Median Sale Price: The sale price at the 50th percentile of all closed transactions during the month, meaning half of homes sold for more and half sold for less. A low number of transactions can skew the median dramatically.

COMPASS INTERNATIONAL HOLDINGS

August Active Listings by Price Segment

Single Family Homes and Condos

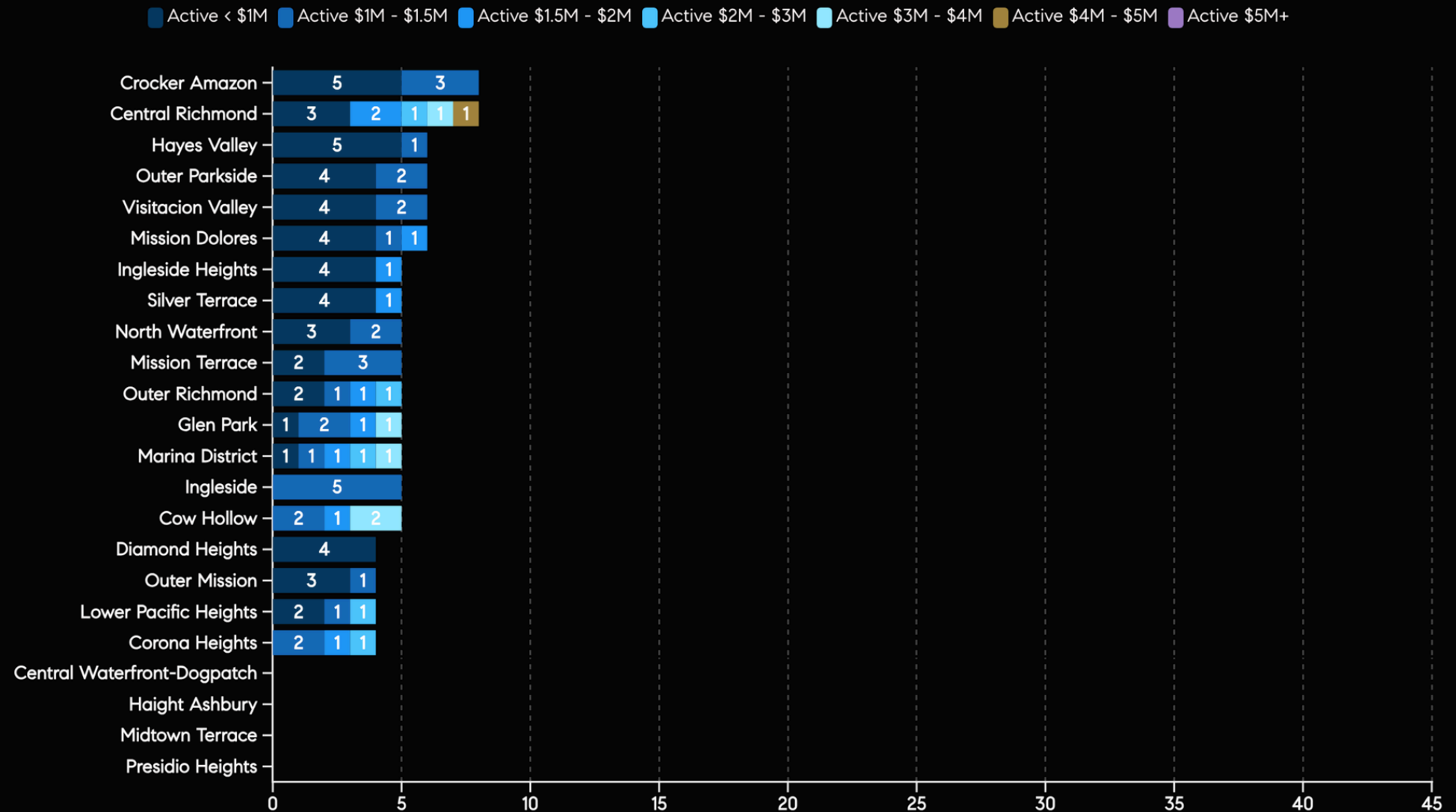
San Francisco County ▾



August Active Listings by Price Segment

Single Family Homes and Condos

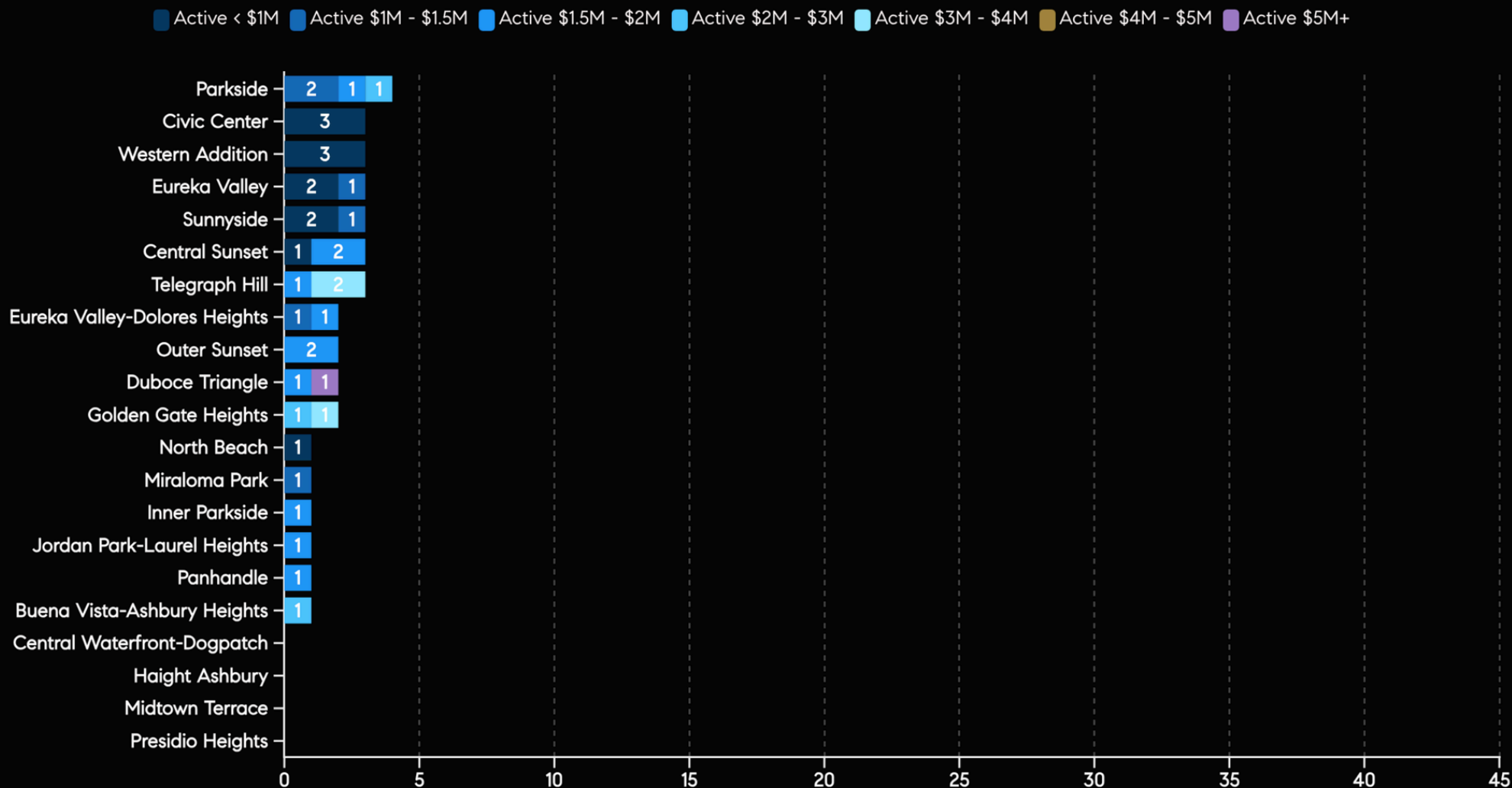
San Francisco County ▾



August Active Listings by Price Segment

Single Family Homes and Condos

San Francisco County ▾



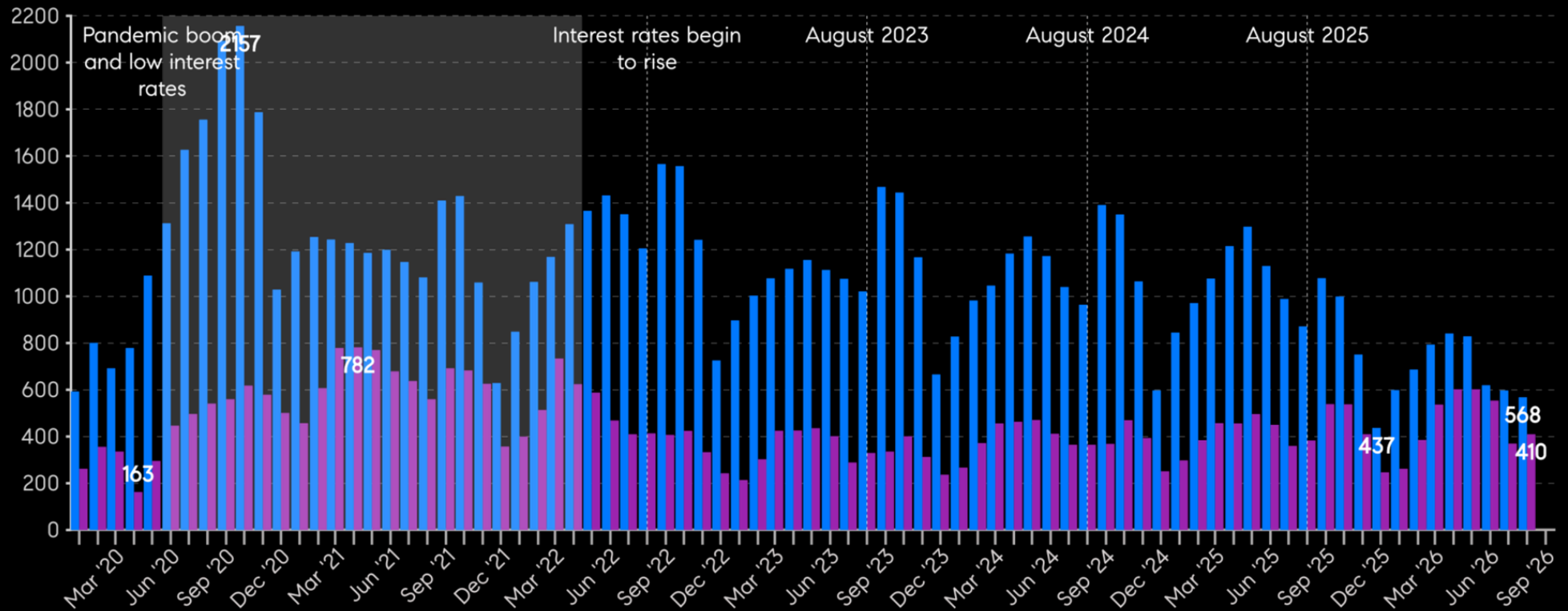
Active & In Contract Listings

Single Family Homes and Condos

A larger gap between active listings and listings in contract indicates more inventory relative to buyer activity, while a smaller gap suggests stronger buyer demand and a more competitive market.

San Francisco County ▾

■ Active Listings - All ■ Listings In Contract - All



Source: Compass via MLS • Single family homes and condos active and listings in contract on the last day of the month

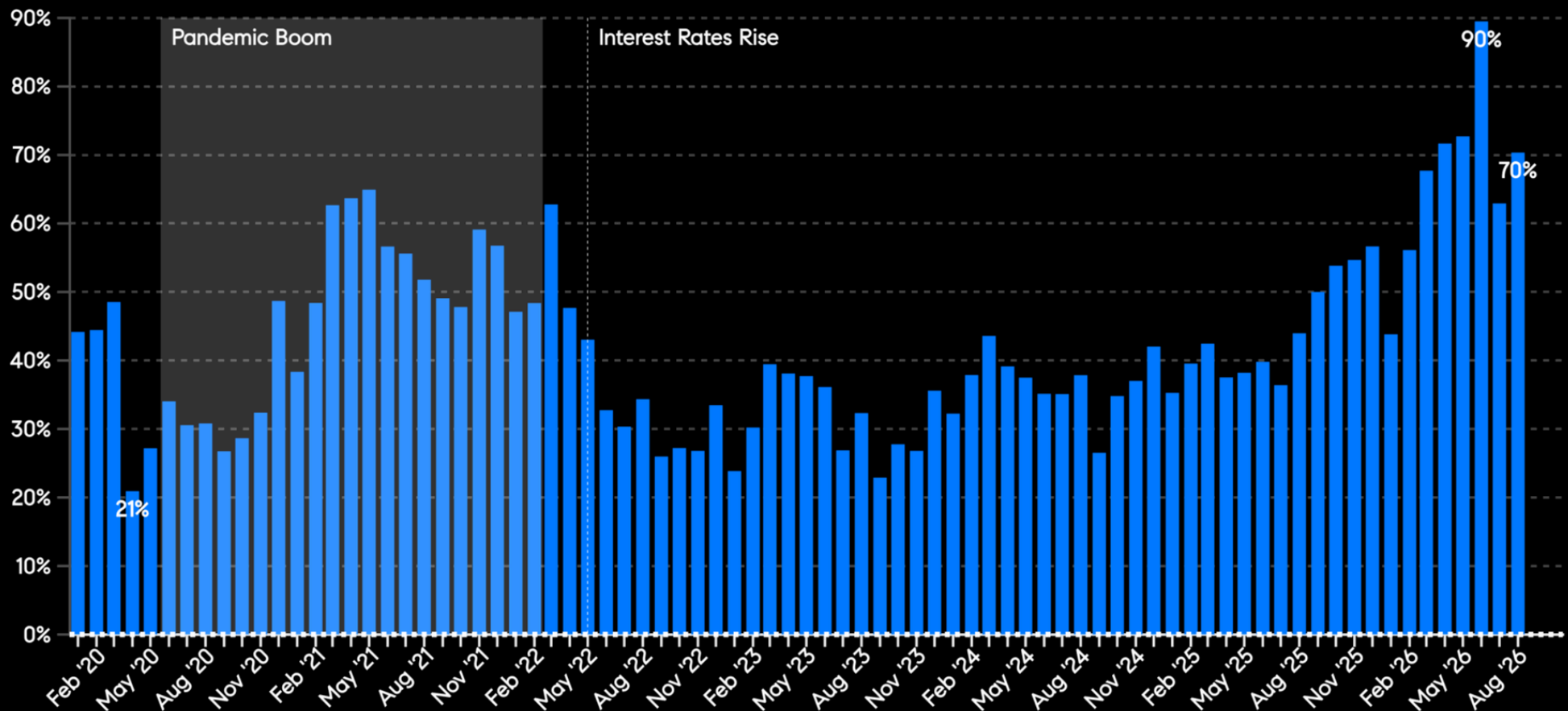
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Percentage of Listings Pending

Single Family Homes and Condos

Absorption Rate: listings in contract divided by active listings; measures how quickly inventory is being absorbed. When absorption rate exceeds 100% it indicates that there are more listings in contract than there are active.

San Francisco County ▾

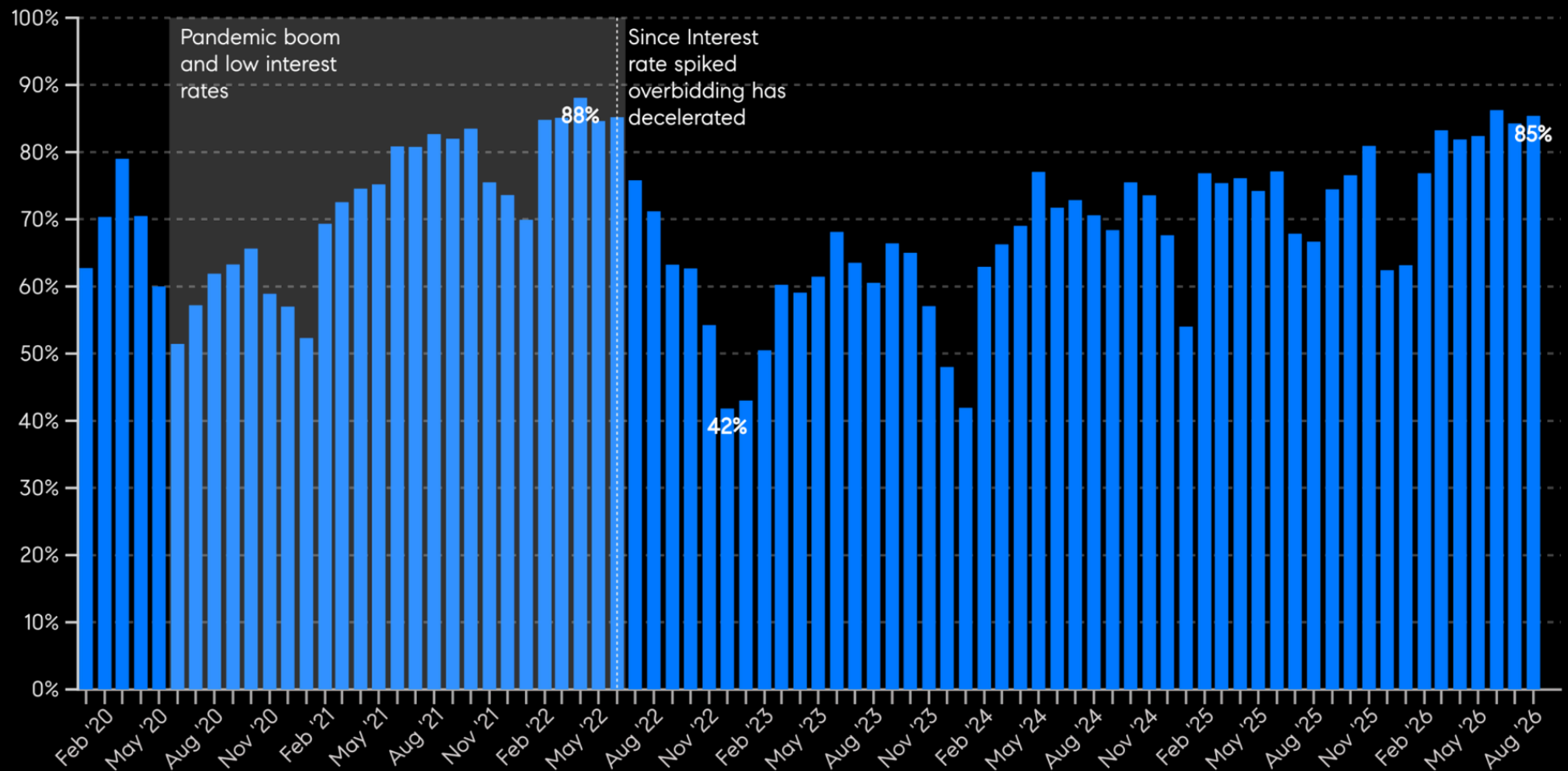


Overbidding: Sales Price Above List

Single Family Homes

Share of single family closed sales where the close price exceeded the list price

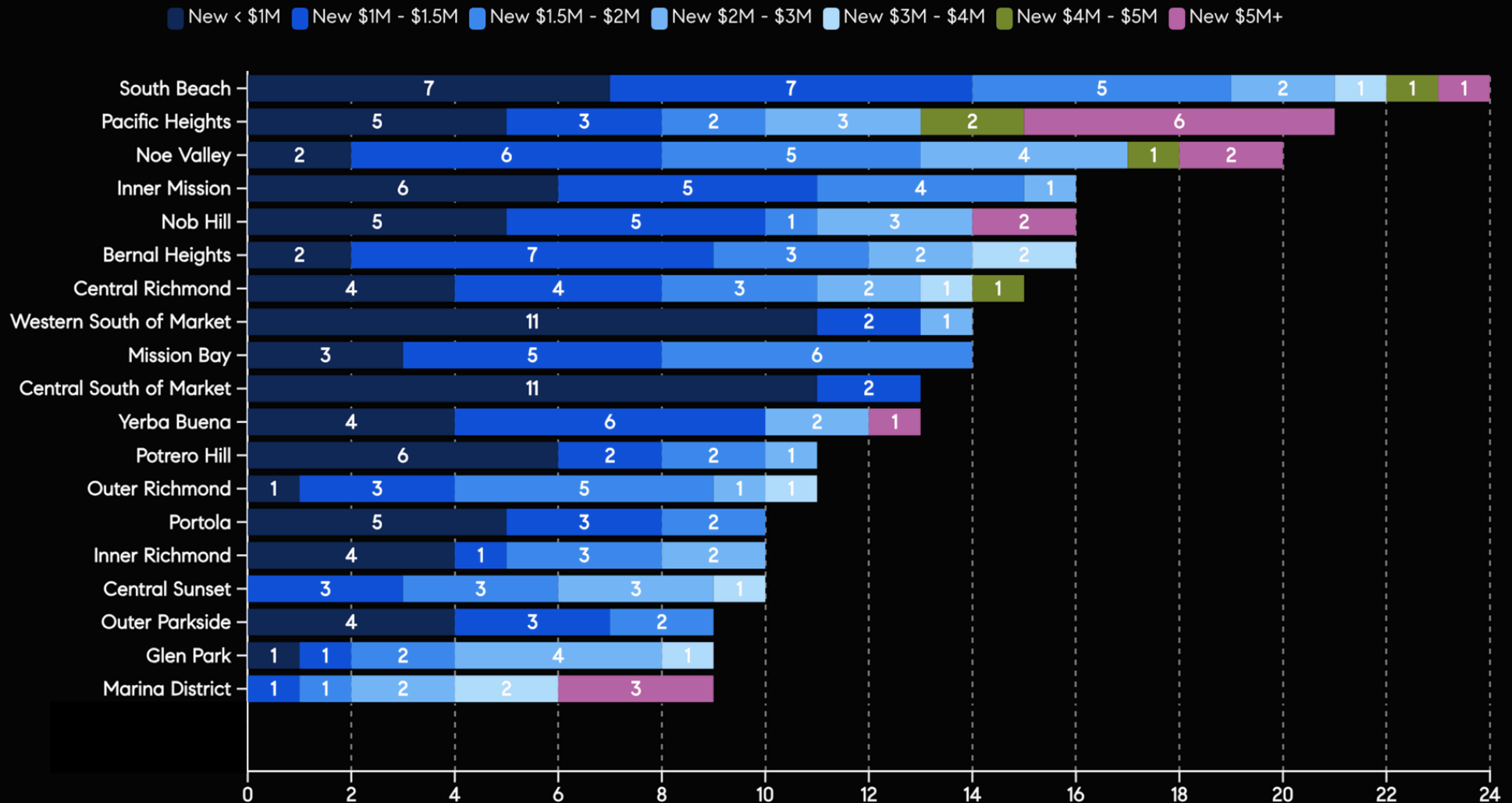
San Francisco County ▾



August New Listings by Price Segment

Single Family Homes and Condos

San Francisco County ▾



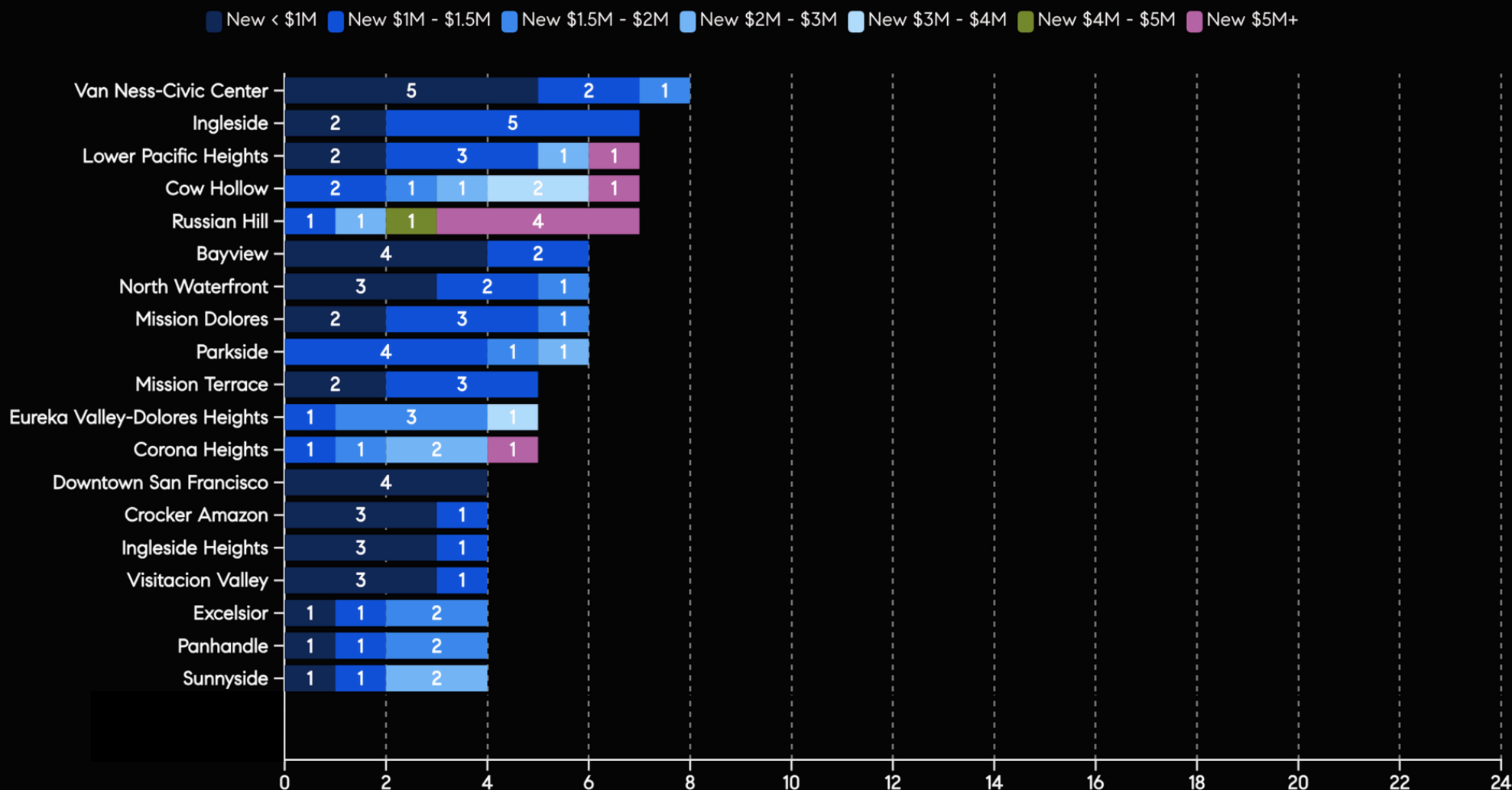
Source: Compass via MLS Single Family Homes and Condos · New Listings : Count of listings that came to market during the month

COMPASS INTERNATIONAL HOLDINGS

August New Listings by Price Segment

Single Family Homes and Condos

San Francisco County ▾



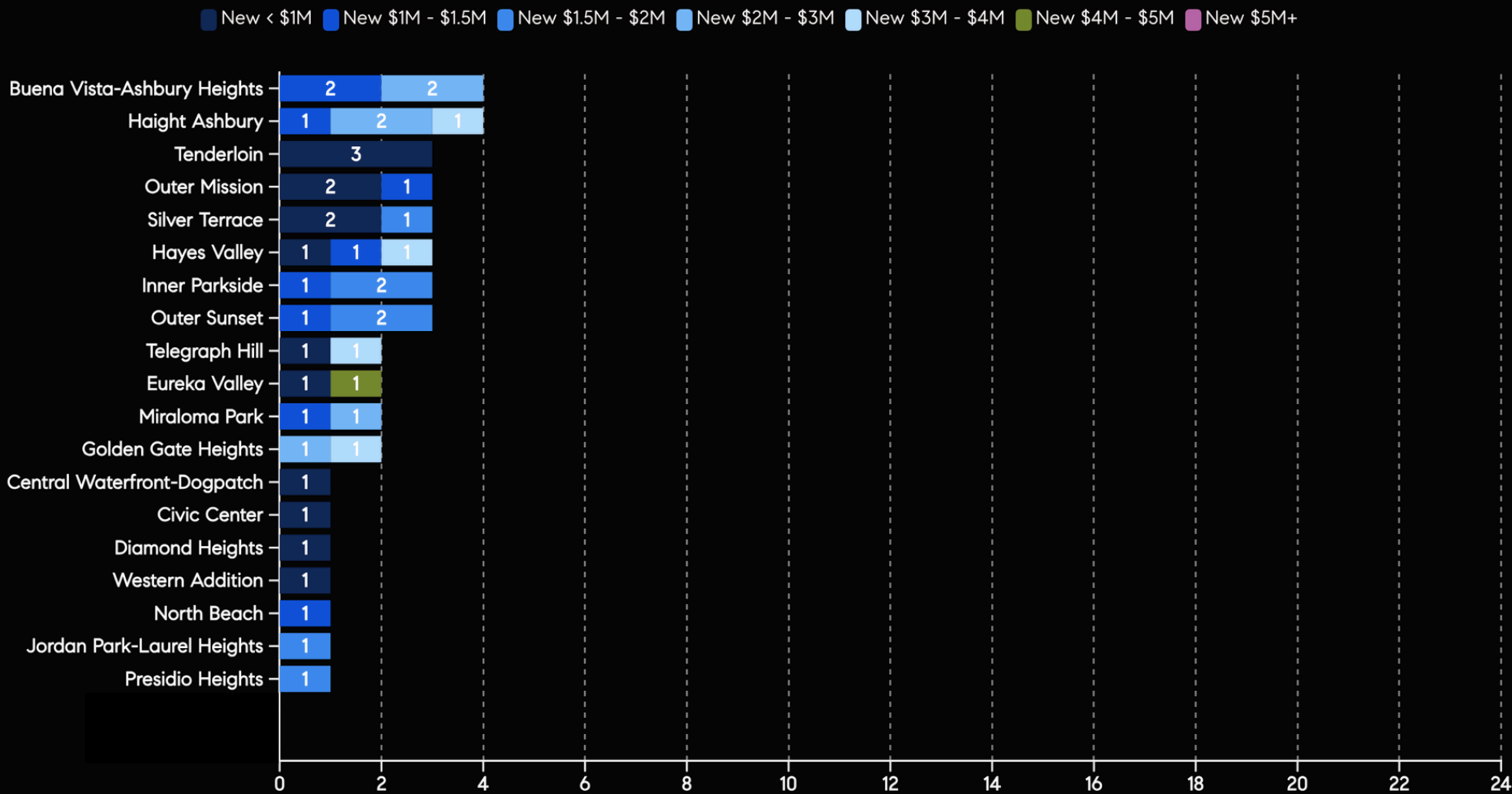
Source: Compass via MLS Single Family Homes and Condos · New Listings : Count of listings that came to market during the month

COMPASS INTERNATIONAL HOLDINGS

August New Listings by Price Segment

Single Family Homes and Condos

San Francisco County ▾



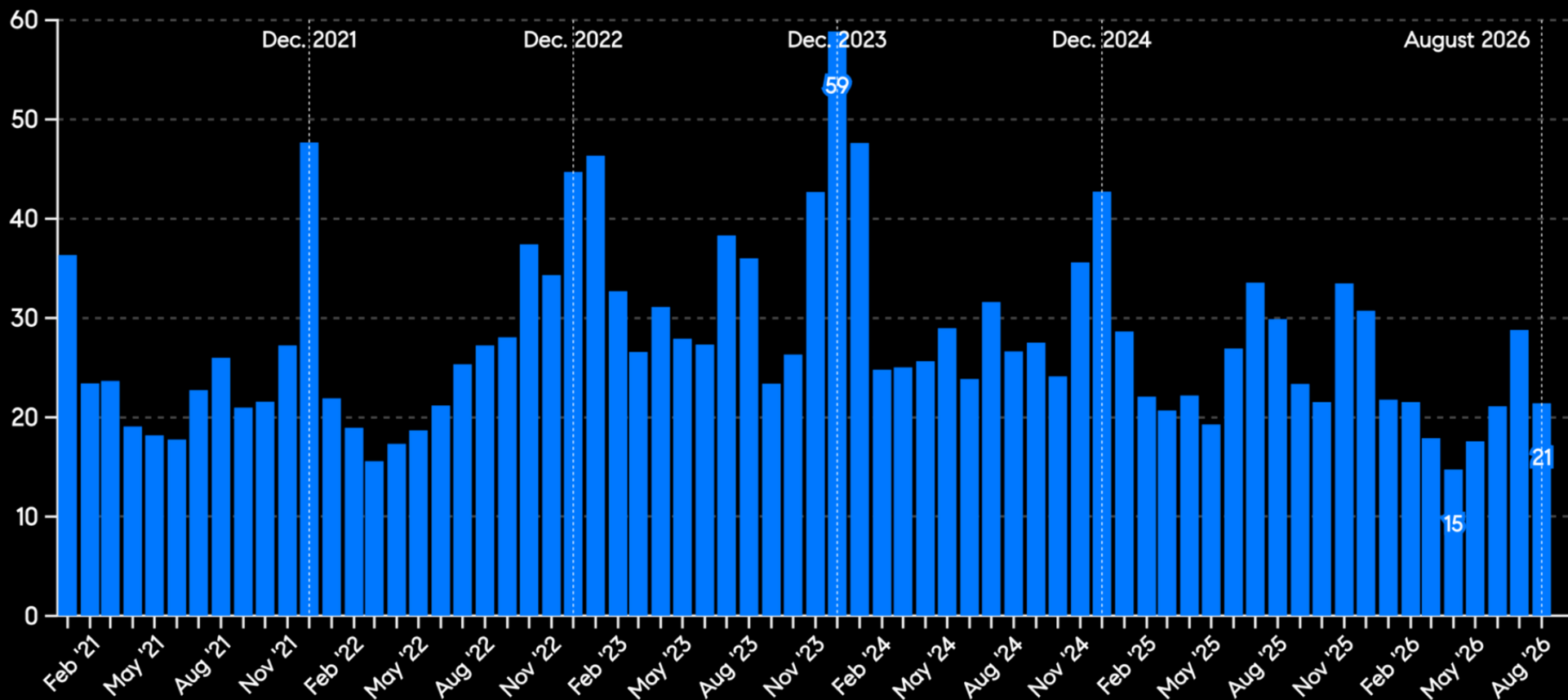
Source: Compass via MLS Single Family Homes and Condos · New Listings : Count of listings that came to market during the month

Average Days on Market

Single Family Homes

Measures how long it takes sold listings to accept an offer. Homes typically sell fastest in the spring and early fall, when new listings surge, and slowest in midwinter, when the existing inventory tends to be oldest.

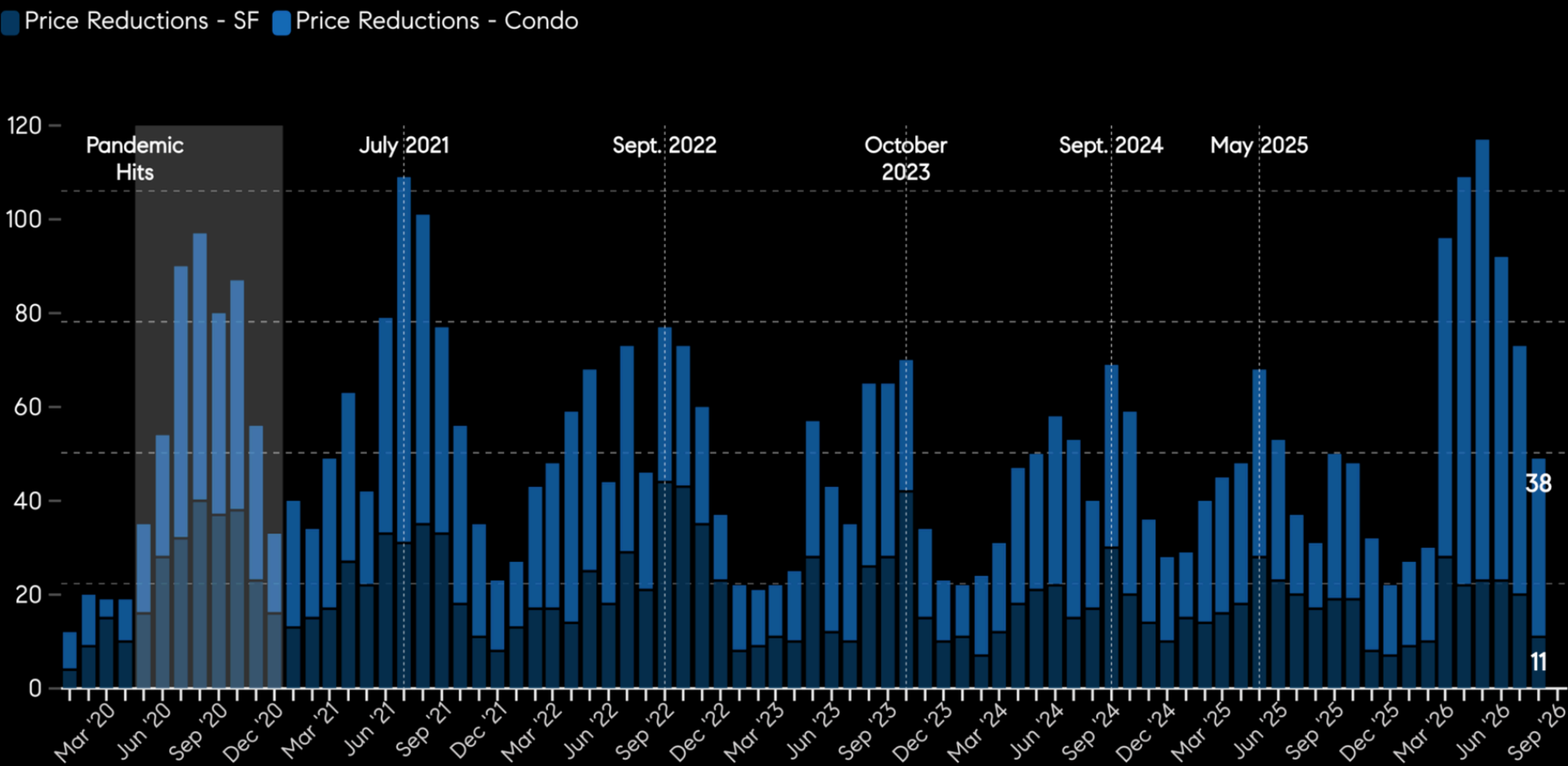
San Francisco County ▾



Price Reductions

The number of price reductions typically ebbs and flows by season but can also be affected by specific events in the economy and the market. They typically peak in the fall before the mid-winter holidays.

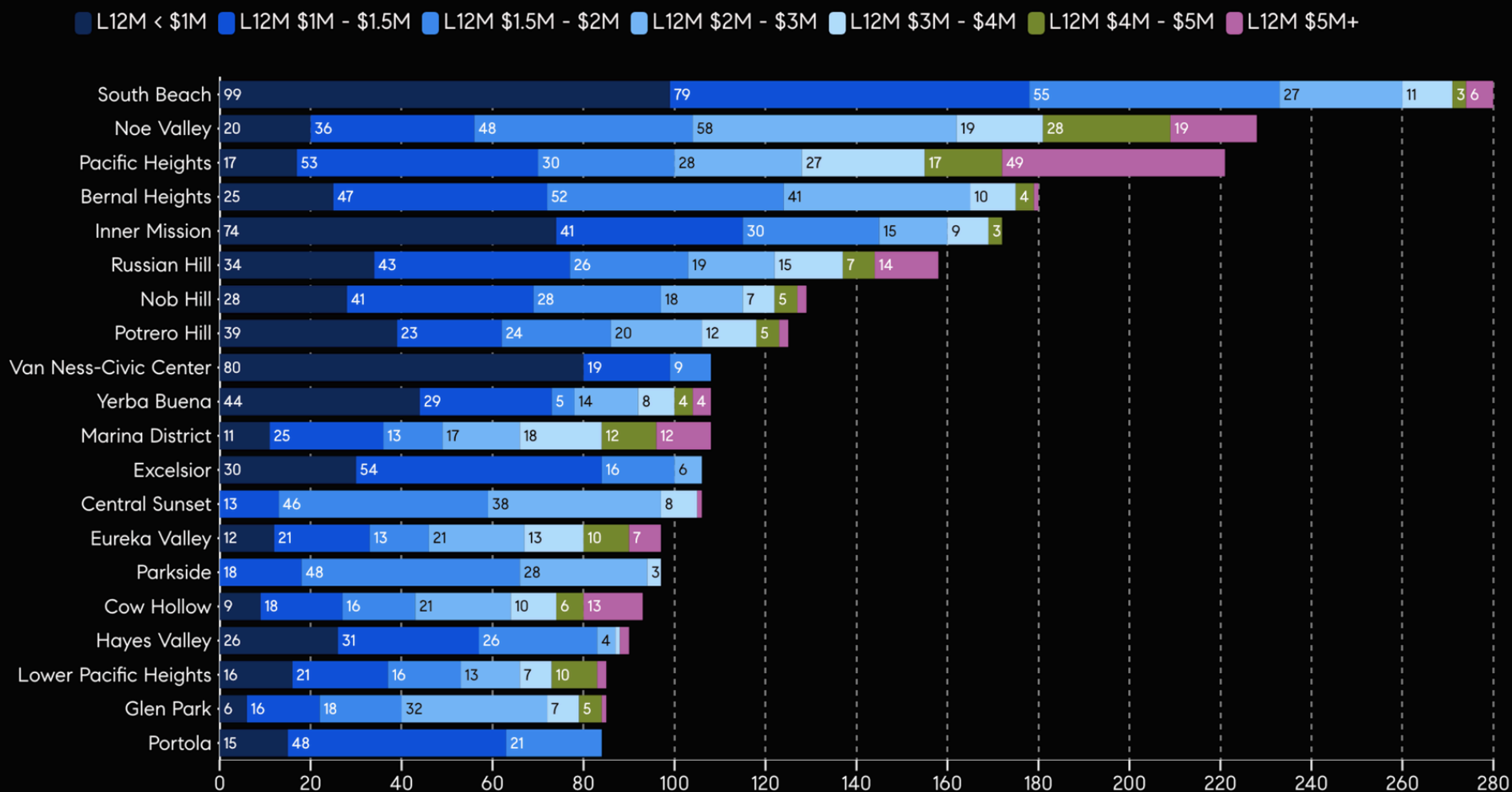
Napa County



Last 12 Months Closed Sales by Price Segment

Single Family Homes and Condos

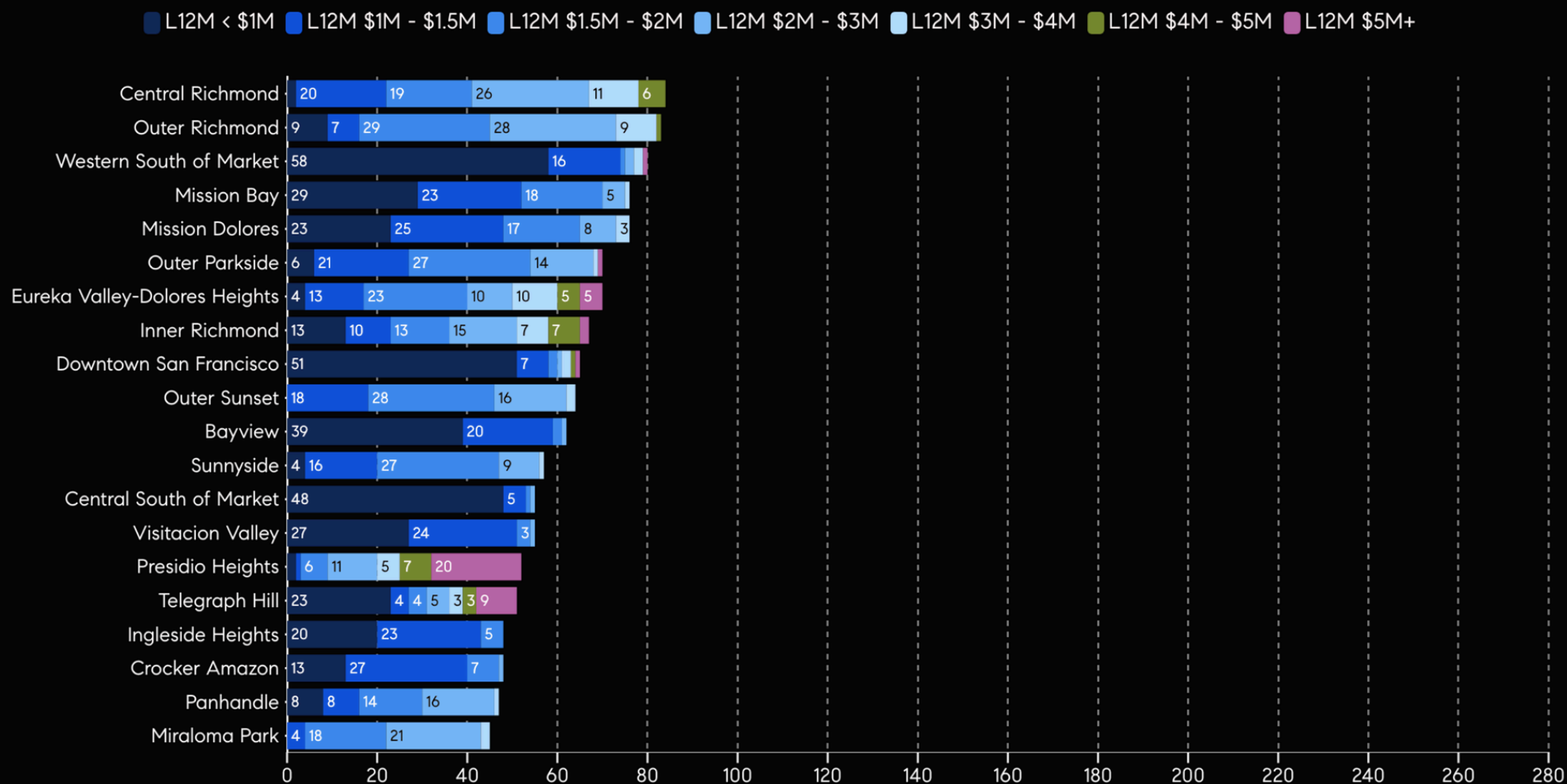
San Francisco County ▾



Last 12 Months Closed Sales by Price Segment

Single Family Homes and Condos

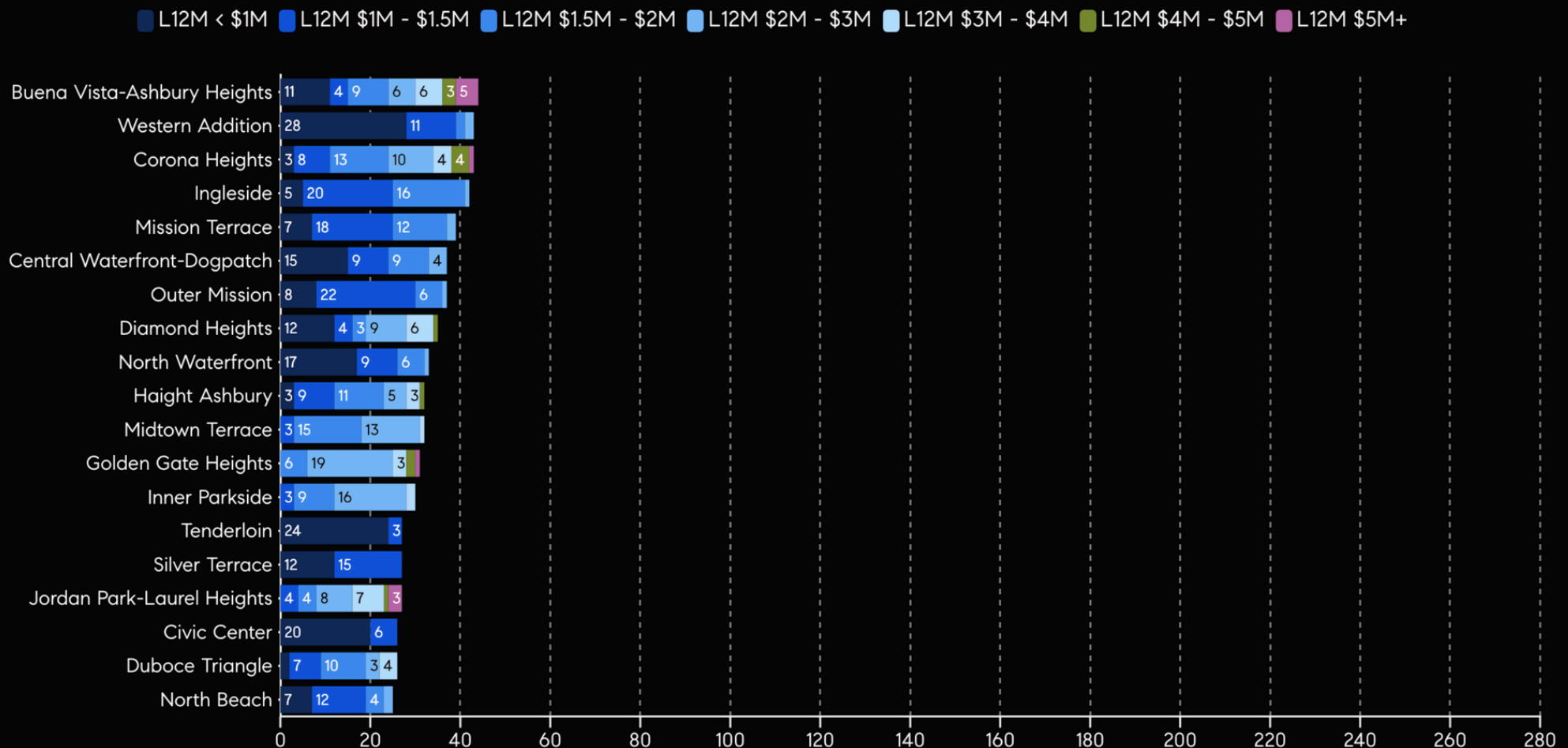
San Francisco County ▾



Last 12 Months Closed Sales by Price Segment

Single Family Homes and Condos

San Francisco County ▾



Source: Compass via MLS · Single Family Homes and Condos

COMPASS INTERNATIONAL HOLDINGS

Local San Francisco Neighborhoods — Single Family

Part 1

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Central Waterfront-Dogpatch	—	—	100	13	—
Glen Park	116	300	100	10	41.5
Miraloma Park	—	200	100	6	70.2
Haight Ashbury	—	—	—	26	—
Crocker Amazon	—	33	67	12	-4.9
North Beach	—	—	—	—	—
Silver Terrace	100	20	100	68	22.3
Outer Sunset	100	100	100	4	25.5
Inner Parkside	—	400	100	12	—
Midtown Terrace	—	—	100	12	46.7
Mission Terrace	—	60	100	38	4.9
Golden Gate Heights	—	0	100	—	-19.3

Local San Francisco Neighborhoods — Single Family

Part 2

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Presidio Heights	103	—	—	—	—
Corona Heights	—	100	—	4	—
Ingleside Heights	—	100	80	26	-23.8
Ingleside	131	140	86	30	36.2
Eureka Valley	99	—	100	18	236.7
Central Richmond	—	100	67	12	22.6
Downtown San Francisco	—	—	—	—	—
Diamond Heights	—	—	100	—	88.9
Bayview	100	43	75	43	3.4
Hayes Valley	88	—	—	6	—
Inner Richmond	—	75	—	112	—
Parkside	154	175	80	14	10.7

Local San Francisco Neighborhoods — Single Family

Part 3

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Telegraph Hill	—	0	0	—	-78.3
Outer Mission	—	100	75	30	30.3
Cow Hollow	100	100	—	5	—
Sunnyside	100	150	100	55	127.8
Mission Dolores	114	—	—	—	—
South Beach	—	0	—	—	—
Inner Mission	115	83	67	25	27.8
Pacific Heights	100	133	100	6	10.4
Central Sunset	151	550	100	8	36.4
Noe Valley	100	160	80	8	106.4
Nob Hill	—	33	0	9	—
Russian Hill	100	0	—	—	—

Local San Francisco Neighborhoods — Single Family

Part 4

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Visitation Valley	101	83	100	20	11.5
Potrero Hill	—	0	67	—	466.7
Portola	100	138	88	17	22
Western South of Market	—	0	—	—	—
Bernal Heights	100	100	63	44	39.3
Lower Pacific Heights	99	200	0	71	—
Outer Richmond	—	200	100	8	30.7
Outer Parkside	137	267	86	39	10.5
Excelsior	—	44	83	13	-18.9

Local San Francisco Neighborhoods — Single Family

Part 1

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Glen Park	116	300	100	10	41.5
Silver Terrace	100	20	100	68	22.3
Outer Sunset	100	100	100	4	25.5
Ingleside	131	140	86	30	36.2
Bayview	100	38	80	43	6.1
Parkside	154	175	80	14	10.7
Sunnyside	100	150	100	55	127.8
Inner Mission	115	83	67	25	27.8
Pacific Heights	100	133	100	6	10.4
Central Sunset	151	550	100	8	36.4
Noe Valley	100	180	83	7	124.3
Visitacion Valley	101	83	100	20	11.5

Local San Francisco Neighborhoods — Single Family

Part 2

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Portola	100	138	88	17	22
Bernal Heights	100	100	63	44	39.3
Outer Parkside	137	300	86	41	10.5

Source: Compass via MLS

COMPASS INTERNATIONAL HOLDINGS

Local San Francisco Neighborhoods — Single Family

Part 1

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Glen Park	116	300	100	10	41.5
Silver Terrace	100	20	100	68	22.3
Outer Sunset	100	100	100	4	25.5
Ingleside	131	140	86	30	36.2
Bayview	100	38	80	43	6.1
Parkside	154	175	80	14	10.7
Sunnyside	100	150	100	55	127.8
Inner Mission	115	83	67	25	27.8
Pacific Heights	100	133	100	6	10.4
Central Sunset	151	550	100	8	36.4
Noe Valley	100	180	83	7	124.3
Visitacion Valley	101	83	100	20	11.5

Local San Francisco Neighborhoods — Single Family

Part 2

Neighborhood	Sale to List %	Absorption Rate %	Overbid %	DOM	12 Month Appreciation %
Portola	100	138	88	17	22
Bernal Heights	100	100	63	44	39.3
Outer Parkside	137	300	86	41	10.5

Source: Compass via MLS

COMPASS INTERNATIONAL HOLDINGS

September 2026

Housing Market Report

Mortgage rates remain stubbornly elevated at 6.8%, near a 15-month high, as government spending, geopolitical tension, and inflation fears keep bond markets on edge. Don't expect meaningful rate relief soon. Inflation, while easing for two straight months, is still running well above the Fed's 2% target. Locally, the story has flipped. After years of Bay Area inflation running below the national rate, home price appreciation has resumed.

The labor market sends mixed signals. Nationally, August jobs data showed surprising strength, averaging 80,000 new jobs a month in 2026. That's good for homebuyer confidence, but also fuel for inflation and higher-for-longer rates. Locally, it's the opposite: the Bay Area has shed jobs five months running, and tech employment keeps contracting nationally. Low hiring rates continue to suppress relocation-driven demand, a key historical driver of home sales.

The bright spots: foreclosures remain near historic lows thanks to high homeowner equity, and Bay Area home prices are outperforming, up 3.3% year-over-year versus 1.5% nationally. Millennials (30-39) now account for the largest share of mortgage borrowers. Perhaps most notably for our market, inbound migration to the Bay Area has turned positive for the first time in years, with Seattle, Austin, and Manhattan feeding new arrivals.

Mike Simonsen

Chief Economist

Compass International Holdings

The section of this report are select macro-economic and demographic data for the country and the Bay Area.

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How to Read This Report:

County and Submarket Guidance

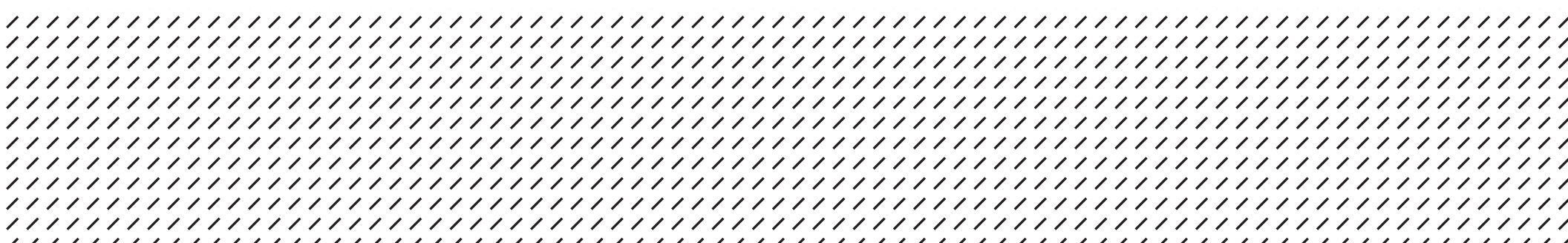
Data quality. Alameda is the report's highest-volume market with solid single-family and condo transactions (604 and 136 respectively in August). City-level metrics are reliable where reported. Oakland (150 single-family closings) anchors the results and reflects approximately 25% of county volume; movements in Oakland disproportionately affect the county trend.

What to trust. Single-family trends are robust. The 16% decline in sales, the flat median at \$1.25M, and the sharp improvement in overbid percentage (13-point jump to 59%) all rest on substantial transaction bases. Days-on-market fell from 32 to 28 across 100+ closings—directional and meaningful.

Condo caution. The 136 condo closings are reliable for county-level trends, but individual city results (e.g., Oakland with 33 condo closings) rest on smaller bases and can swing with mix. The condo median held steady at \$560K; price per square foot data are sound. However, the 4-point overbid gain (23% to 27%) is modest and could reflect sample variation.

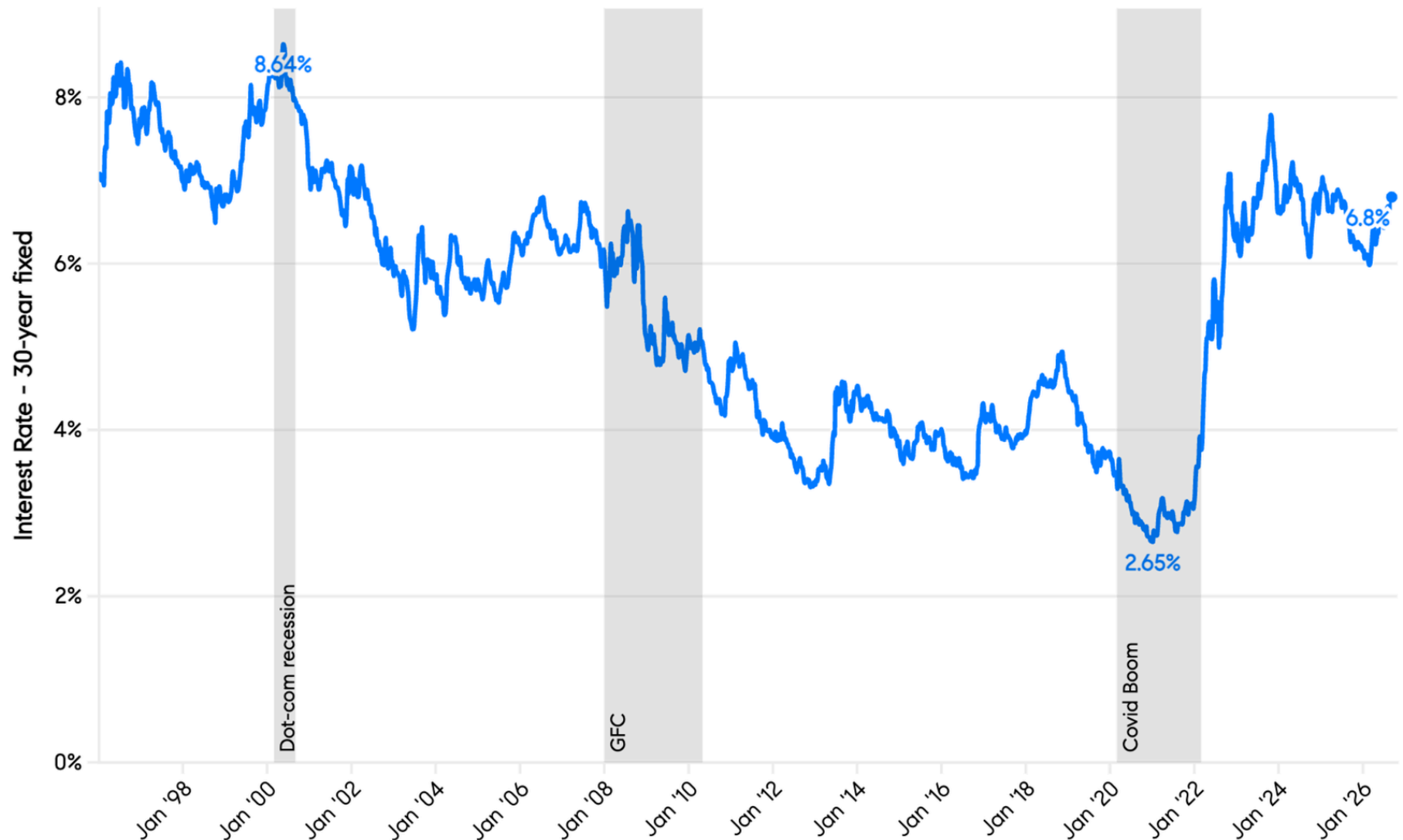
What's missing. Several Alameda cities (Sunol, Dublin, Livermore when considered as single geographies within the county analysis) may not meet the ten-closing minimum for detailed breakdown. Their absence does not indicate no sales occurred—only that the base was too small for reliable metrics.

Context. Alameda's divergence from county-level trends is narrow because Oakland, Fremont, and Berkeley together represent roughly 60% of sales. Read Alameda aggregates as a function of its largest cities, not so much as county-wide consensus.



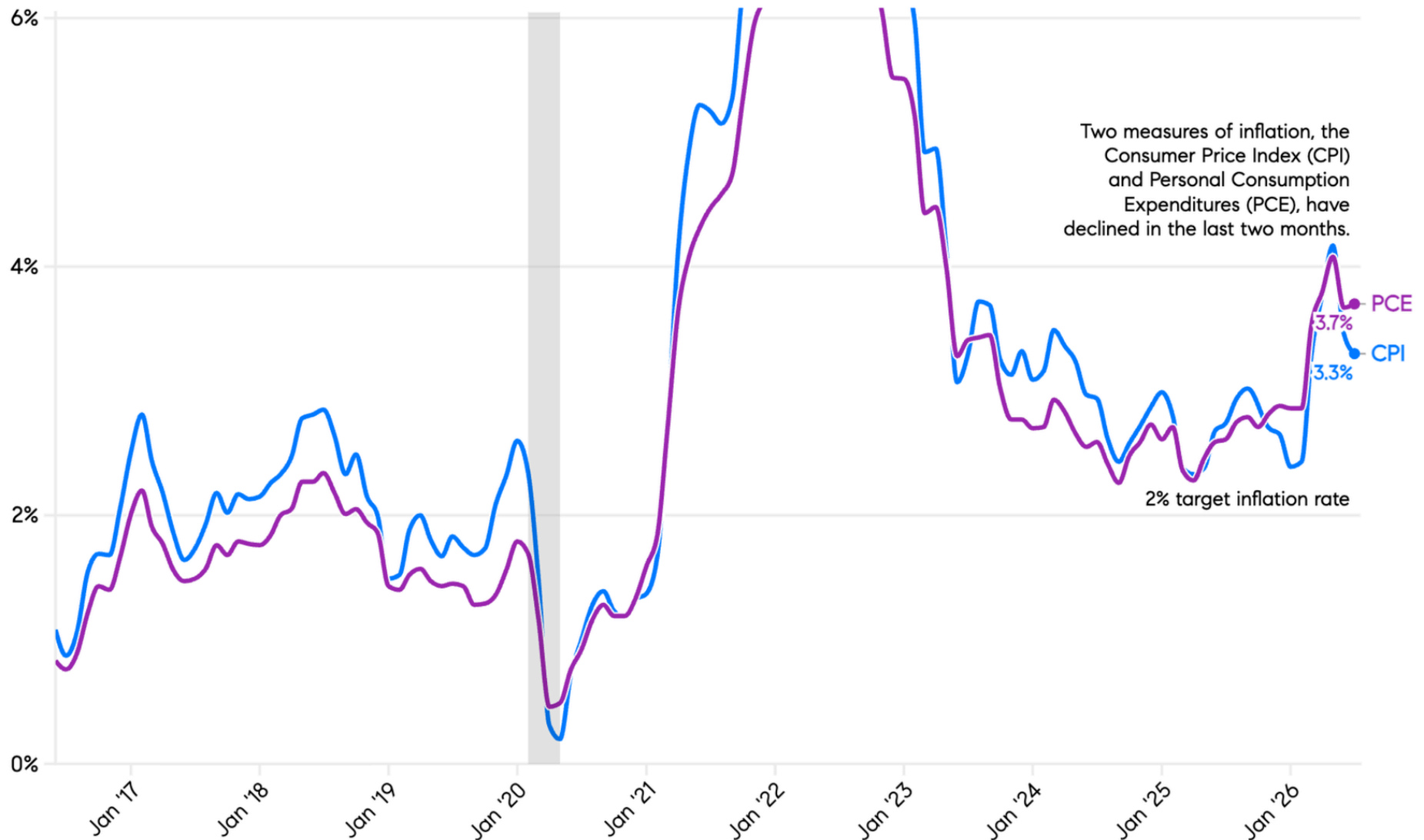
30 Years of Mortgage History

For the last four years mortgage rates have stayed in a range of 6.25% to 7.25%. Given current levels of government spending, international conflict, and inflation fears, bond markets have pushed mortgage rates to the highest levels in 15 months.



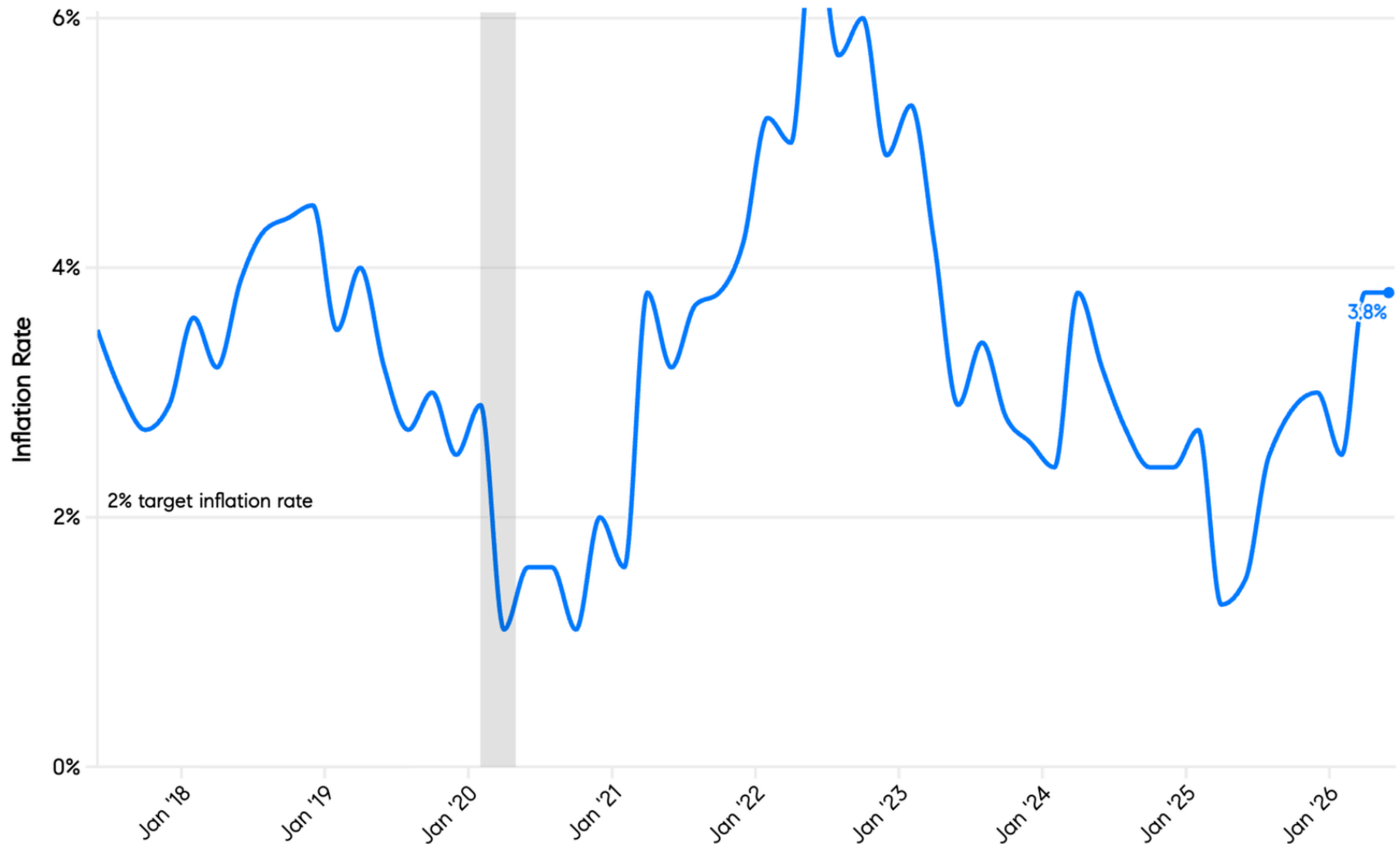
Still-Too-High Inflation

Inflation has been easing lower for two months but readings are still well above policy makers' target levels. Volatile energy markets and government spending keep inflation fears persistent. Elevated inflation implies elevated mortgage rates.



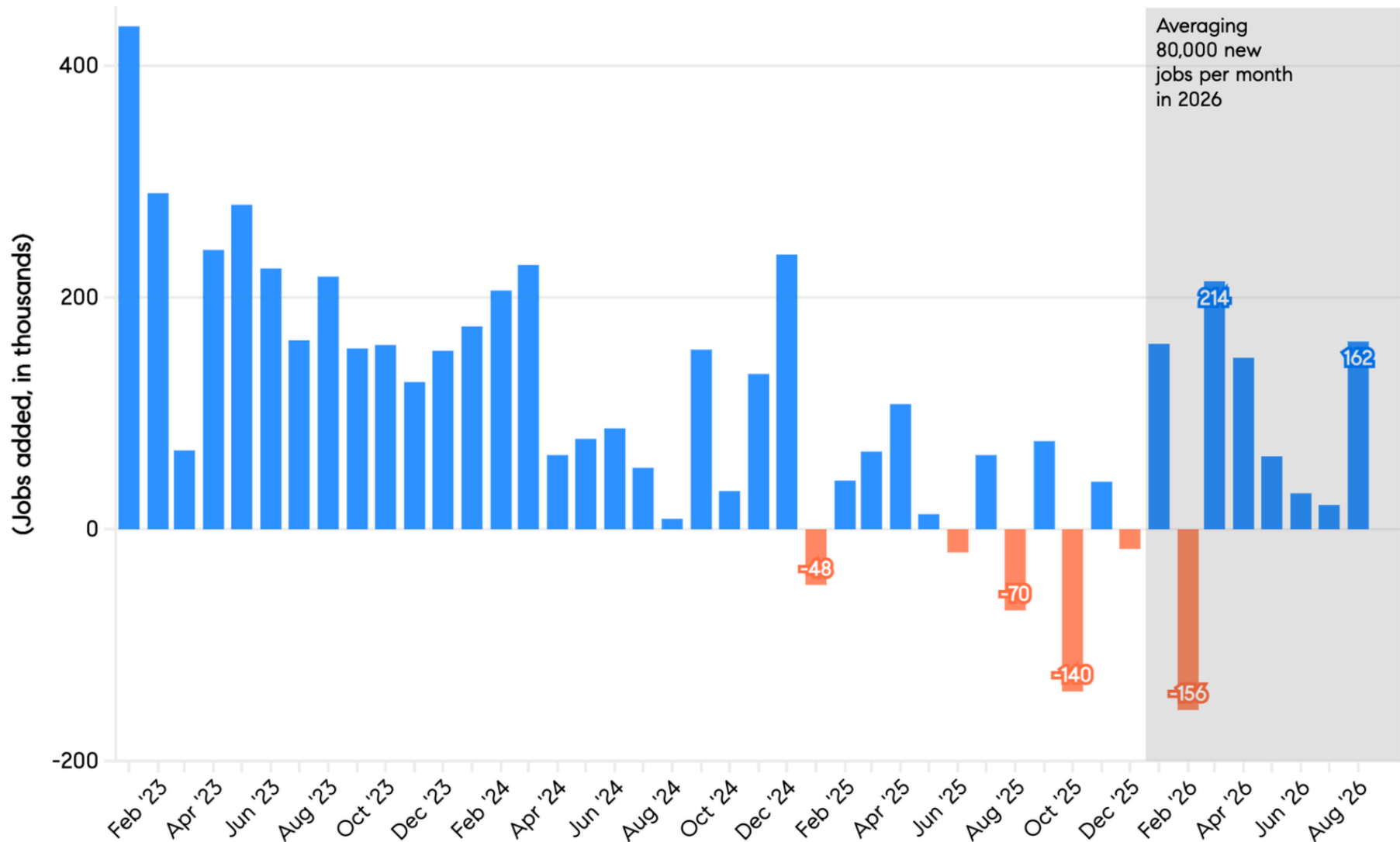
Bay Area Inflation Resumes

For a couple years post-pandemic, home price and rent declines in the San Francisco Bay Area kept inflation in the region below the national averages. Home price appreciation resumed recently and that has driven local inflation back up.



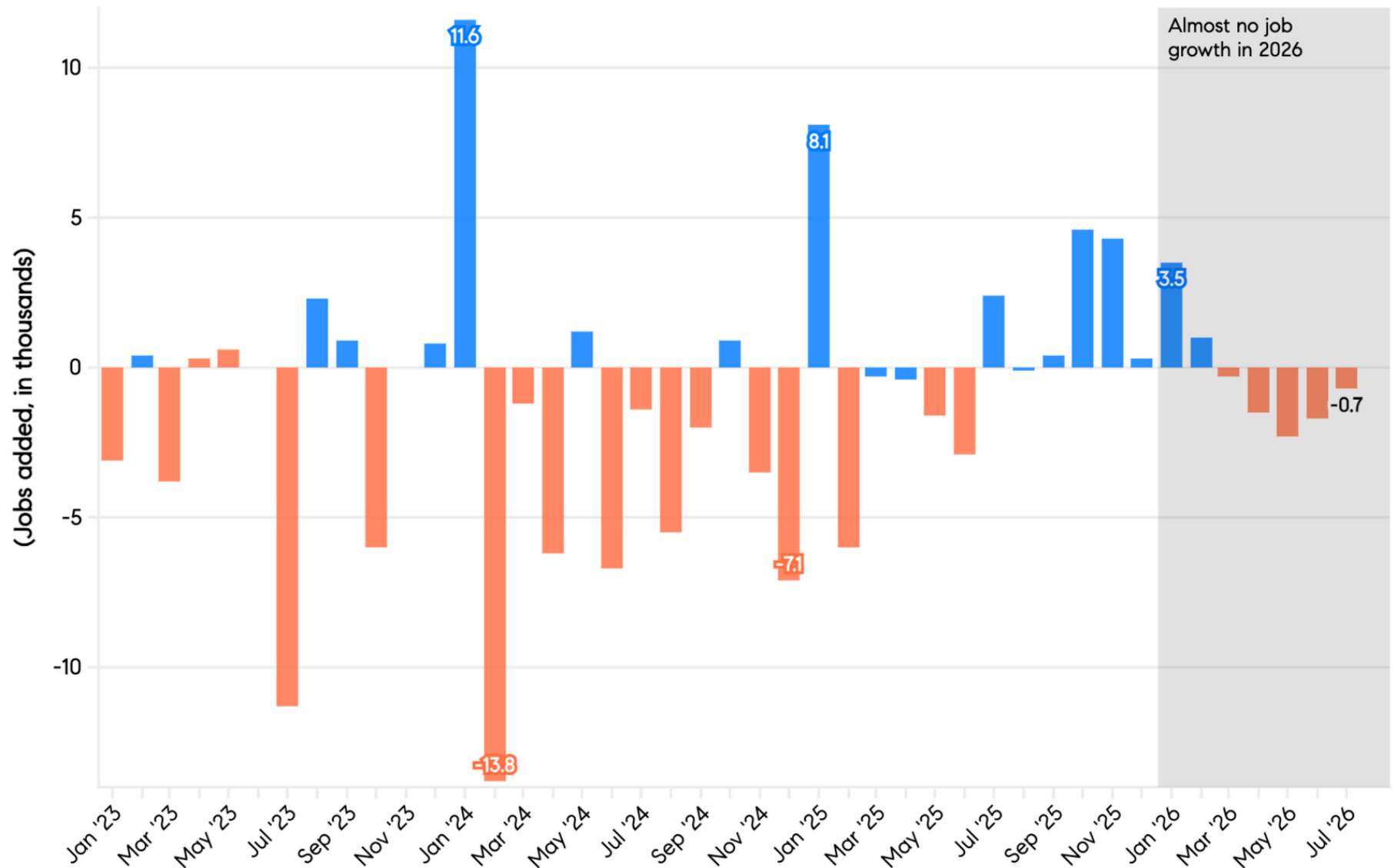
Strong August Jobs Growth

At the national level, the labor market in the August data showed some signs of acceleration. While good jobs growth is good for the economy and home buyer demand, it also has implications for inflation and creates pressure to keep interest rates higher.



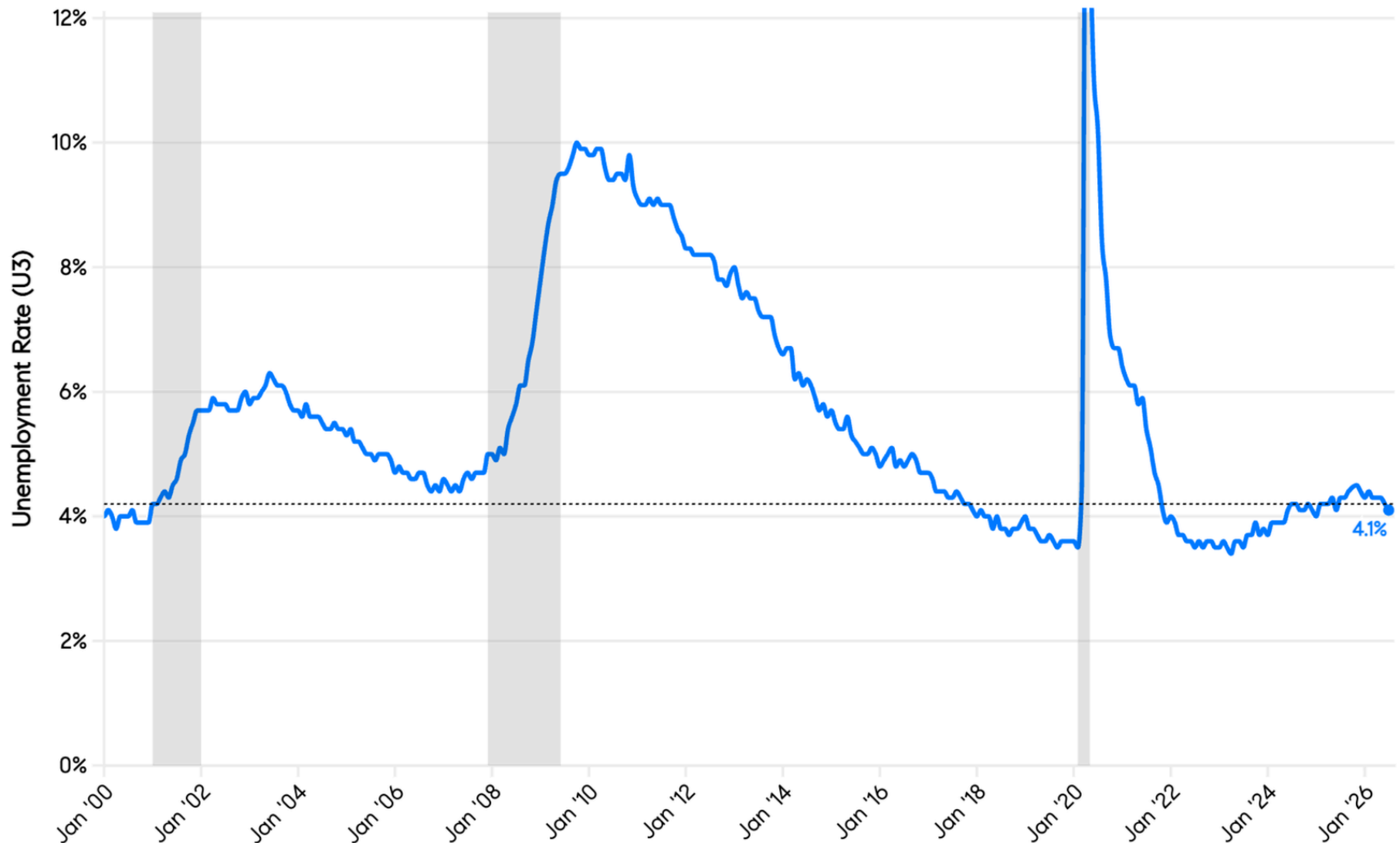
Bay Area Job Growth Slows

While the most recent 12 months have been mildly positive for job growth in the Bay Area, five months in a row have reported a shrinking labor market for the region.



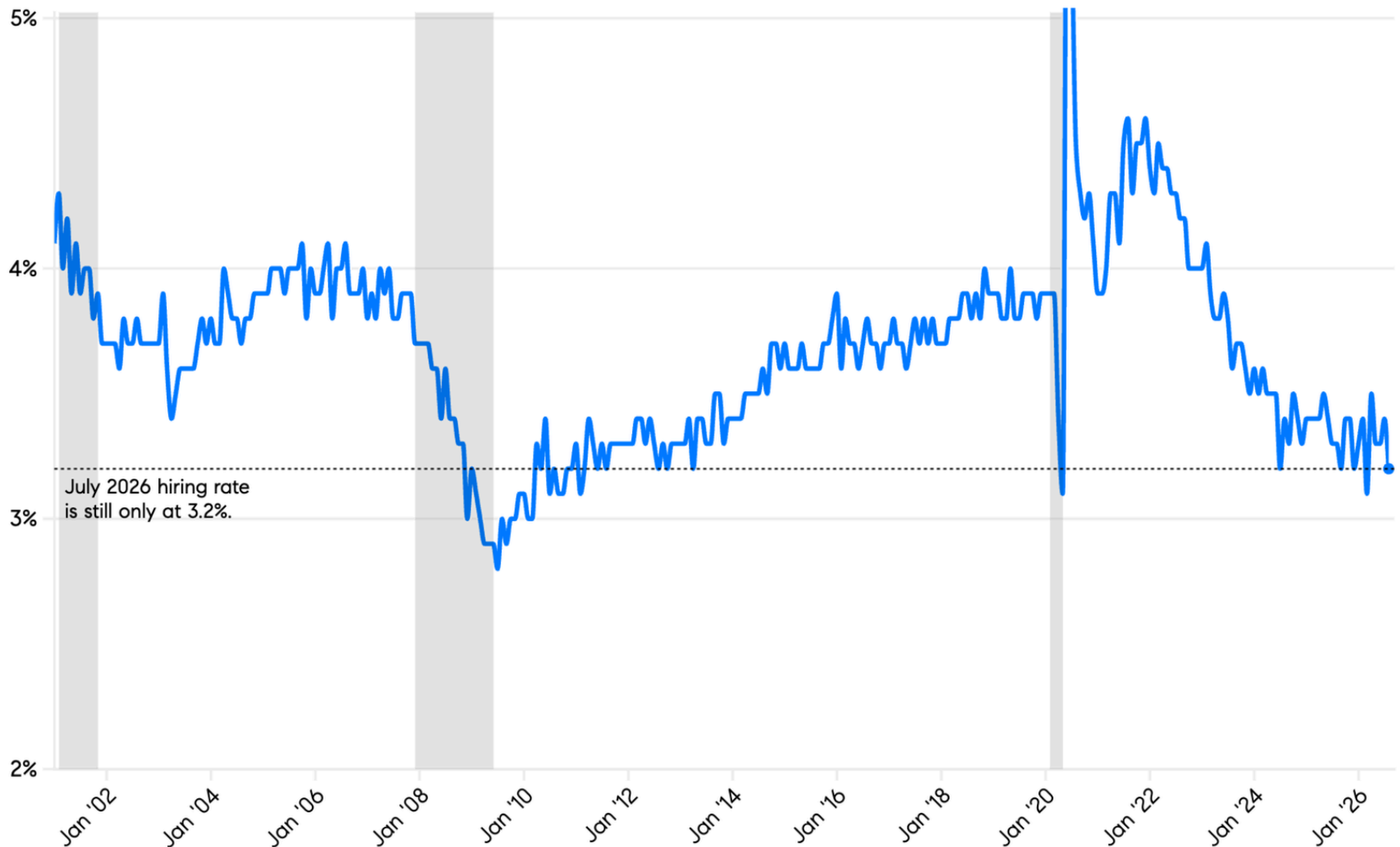
A Low Hire, Low Fire Economy

Even though job creation is slow nationally, unemployment remains at very low levels. Initial claims are at very low levels and long-term unemployment is improving. Americans are, by and large, employed. Continued low unemployment implies very few distressed home sales are in the pipeline.



Low Hiring Rates Keep Us From Moving

Since relocation for work is a key driver of homebuyer demand, the recent low hiring rate has been a limiter of home sales. Even as unemployment remains low nationally and August job creation seems to be improving, companies are still hiring at the same slow pace for two full years.

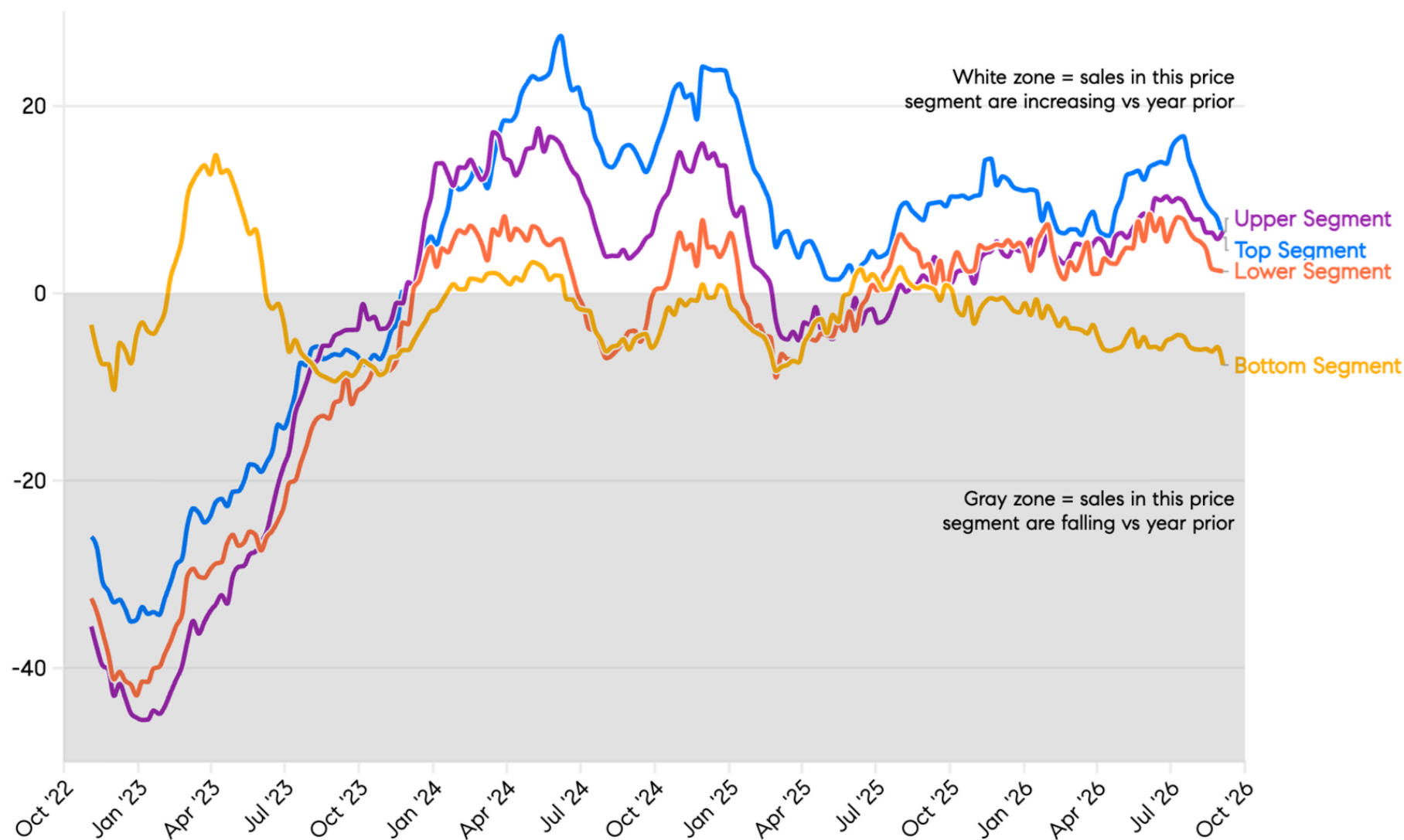


Source: US BLS, JOLTS • Total non-farm hires, seasonally adjusted. Gray areas signify recessions

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Home Sales by Price Segment

Nationally, pending home sales in September 2026 are slowing most notably in the lowest price points. Higher price segments across the country still have more sales than in 2025. This pattern is different now than in 2023 when a weak stock market deterred wealthier buyers more.



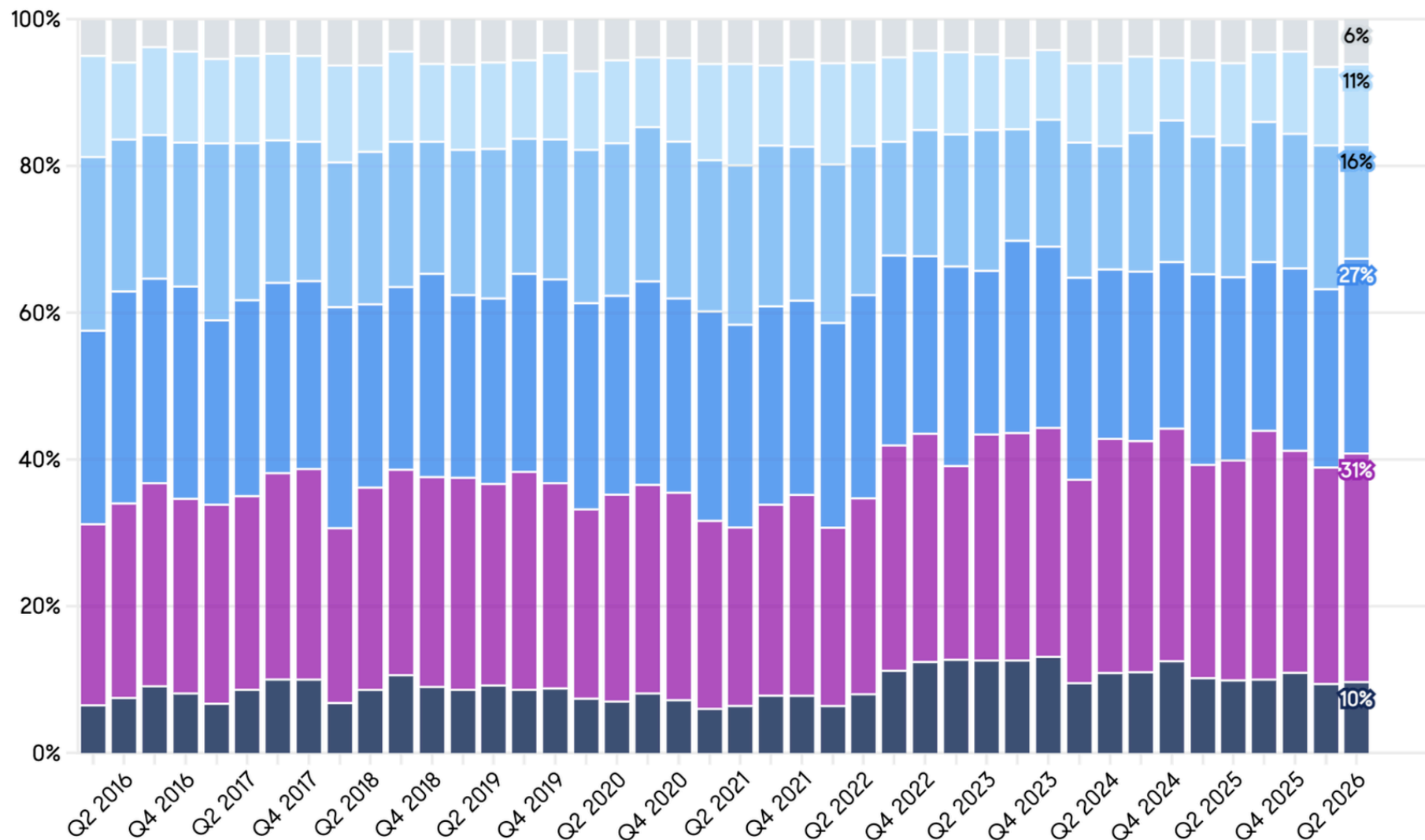
Source: Compass, Altos Research • Weekly pending home sales, 13-week rolling average, percentage change vs the same week a year prior.
Each segment is 25% of the active market, by price.

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Millennials Dominate Mortgage Borrowing

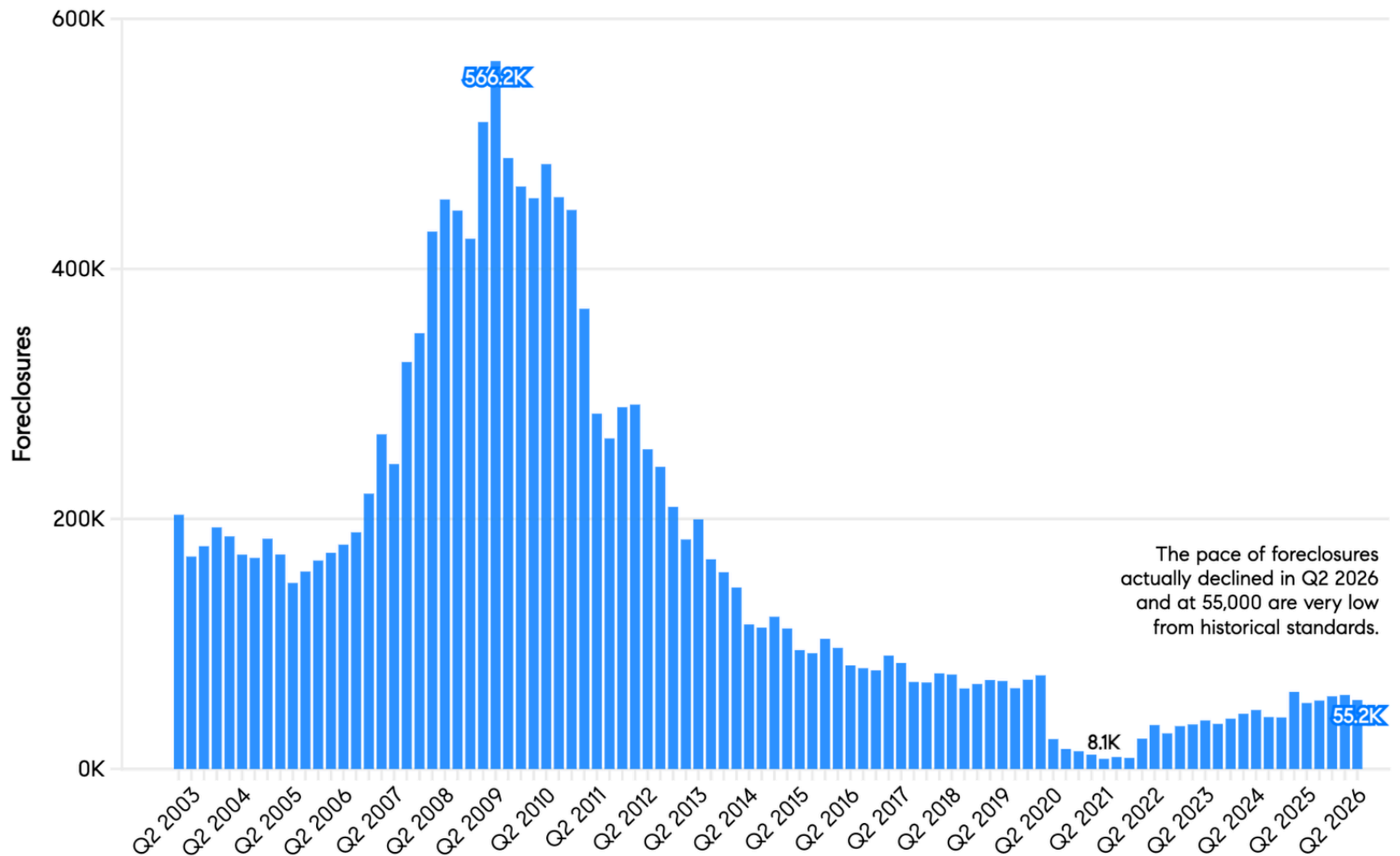
41% of home purchase mortgages are for buyers under 40 years old, slightly more than in the 2010s. This may indicate older buyers more likely to use cash as interest rates have climbed in the last four years.

Buyer Age 18-29 30-39 40-49 50-59 60-69 70+



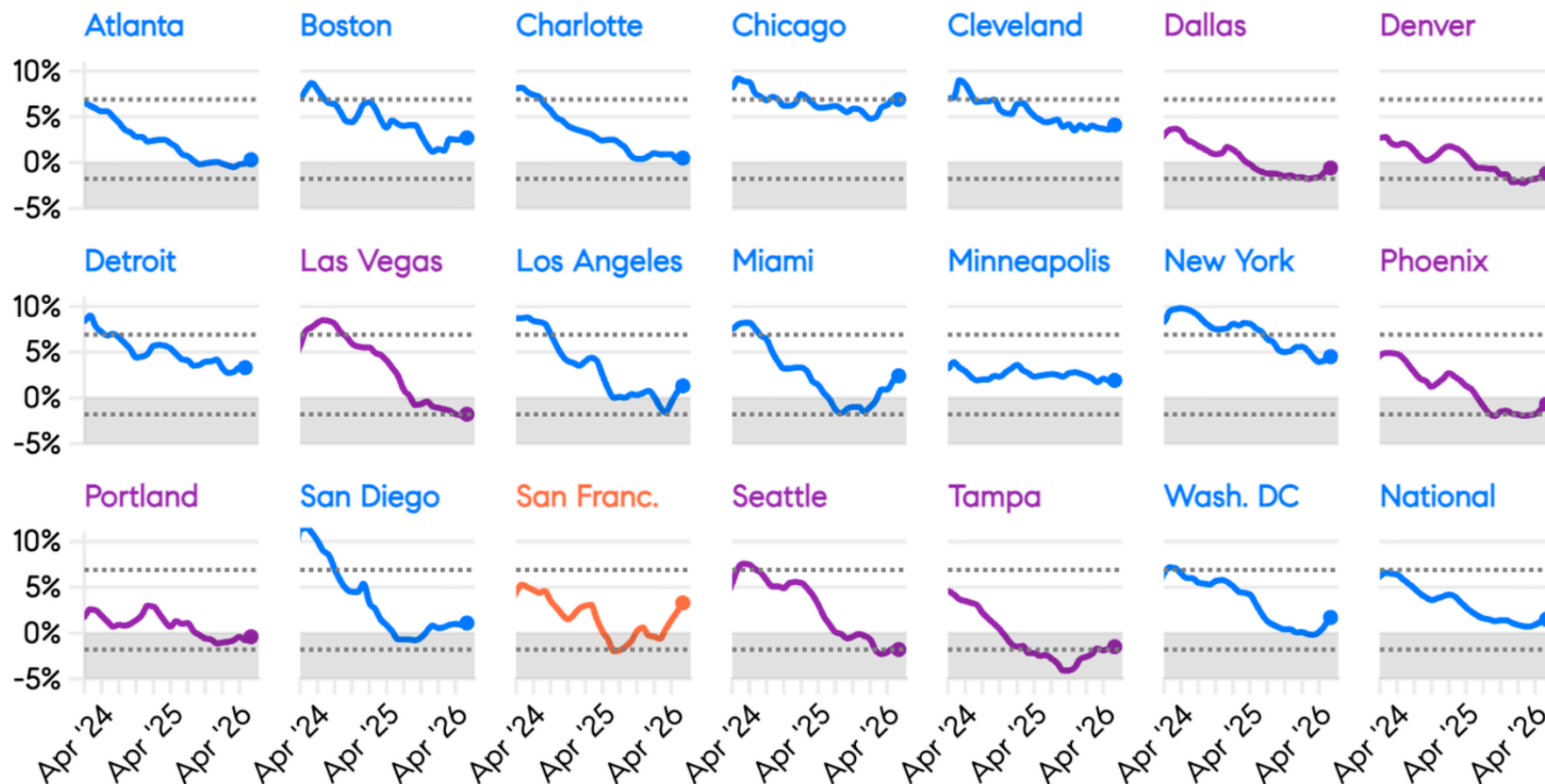
Very Few Foreclosures in 2026

Due to prevalence of high equity, low locked-in mortgage rates, and low unemployment, foreclosures are likely to stay very low into 2027.



Bay Area Home Prices Head Higher

Nationally home prices are +1.5% above last year, while Bay Area home prices have climbed 3.3% in that time. After a slight market recovery in Q2 2026, only seven of the 20 Case Shiller cities have home prices lower than last year.



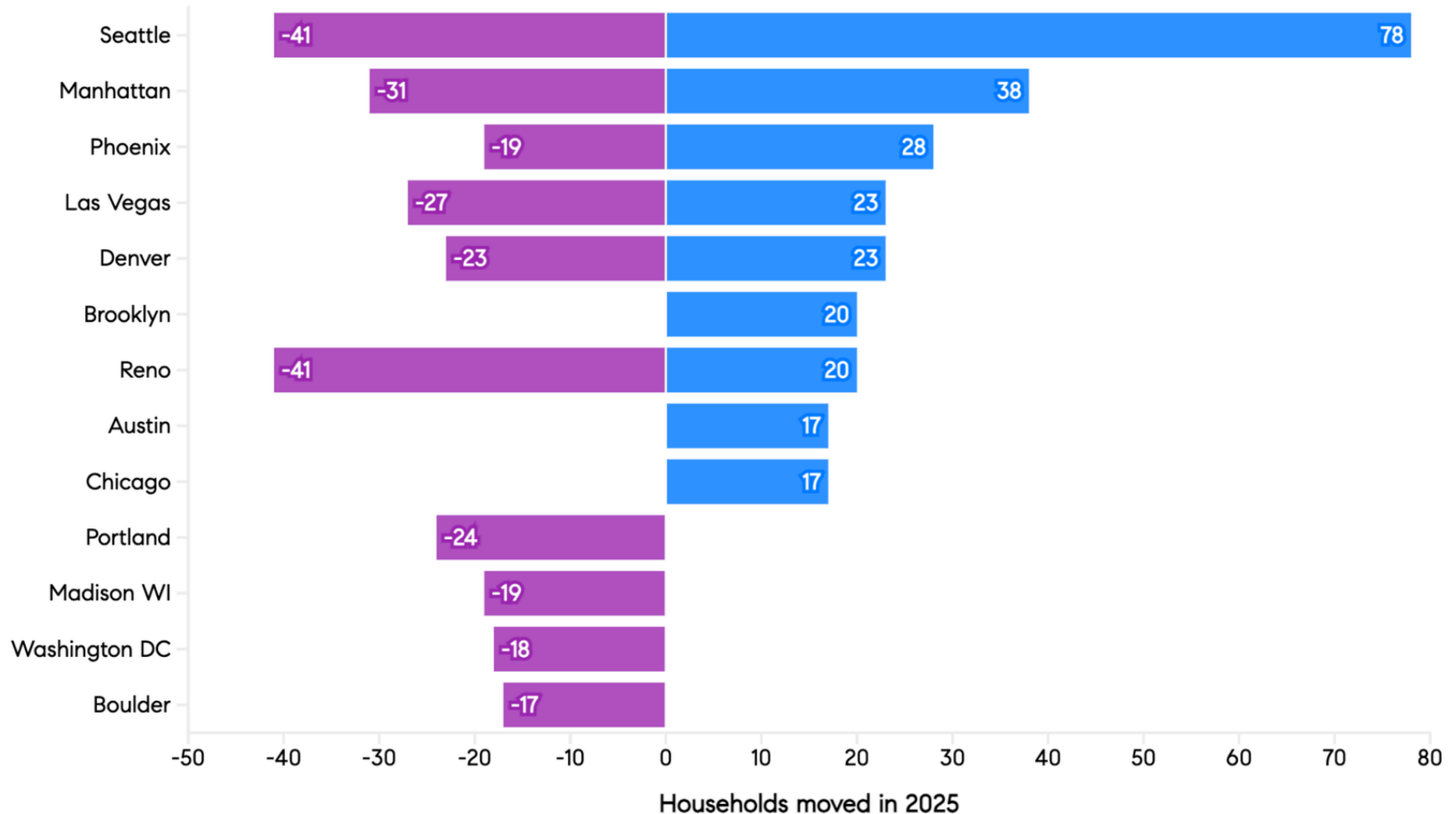
Source: S&P CoreLogic Case-Shiller • Purple cities have home price appreciation vs. June 2025. Orange cities have home price declines from June 2025. Dotted lines are top and bottom performing markets. Gray area is below 0%

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Bay Area Migration Sources & Destinations

In 2025, inbound migration to the Bay Area resumed for the first time in many years. Seattle and Austin are net inbound to San Francisco. Lower cost of living cities remain popular destinations for outbound movers.

■ Inbound ■ Outbound

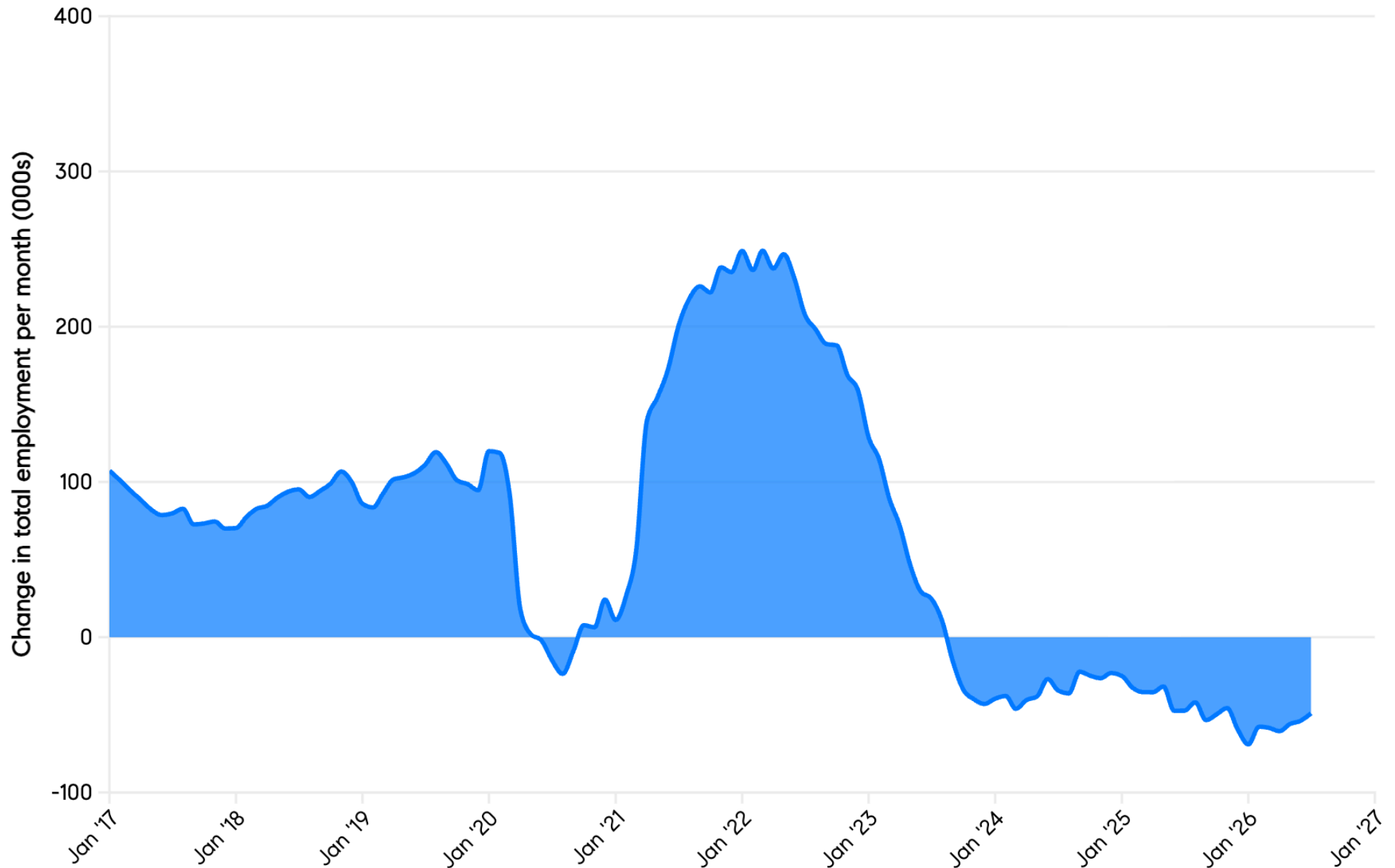


Source: Censai Analytics • Top 10 inbound and outbound counties tracked. Sources include change of address forms and voter registration changes. Likely undercounts students and non-voters.

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Tech Employment Contracts

Across the country, tech employment expanded dramatically during the pandemic period. In the years following, total employment in the sector has consistently shrunk.





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