



12-month sales data eliminates seasonality from statistical calculations, and provides a larger, more reliable data set, but may lag short-term changes.

## Marin County Real Estate Market Dynamics by City, Town & Region

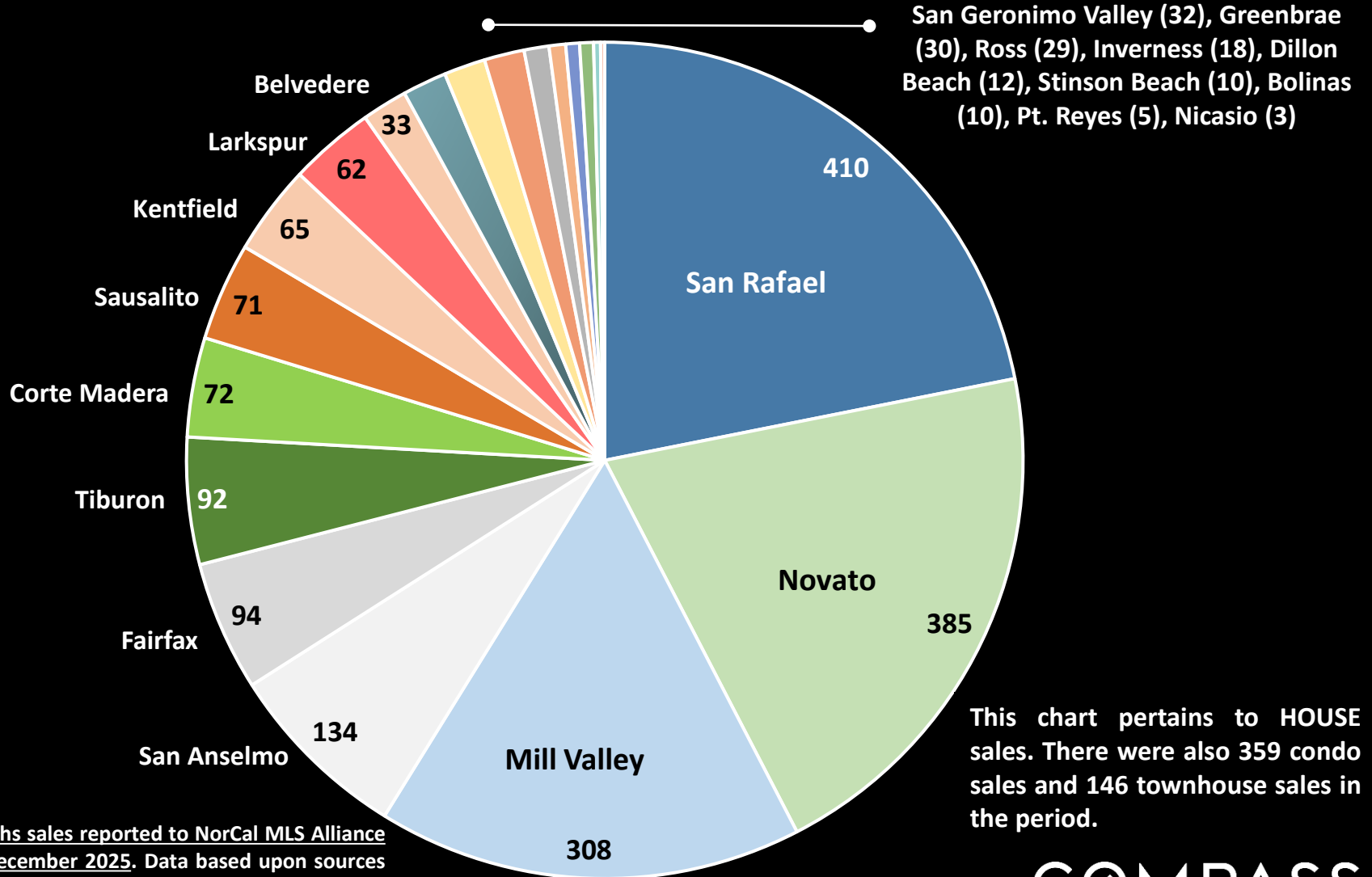
January 2026 Report

COMPASS

# Marin County Home Sales

## 12 Months House Sales by Market\*

New sales are reported constantly.



\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Data based upon sources deemed reliable but may contain errors and subject to revision. All numbers approximate.

This chart pertains to HOUSE sales. There were also 359 condo sales and 146 townhouse sales in the period.

COMPASS

# Marin County Market

## Median House Sales Prices & High Sales, \$5 Million+\*

12 months sales through  
mid-December 2025\*



Median house price in the Bay Area is approx. \$1,300,000.

Median sales price is that price where half the homes sold for more and half for less. It is a very general statistic that typically disguises a huge range of prices in the underlying sales. It can be affected by a variety of factors, including location, median home size, lot size, quality of construction, amenities, views, parking and so on.

This chart applies to HOUSE sales. The median condo sales price was \$690,000, and the median townhouse price was \$850,000. The majority of condo and townhouse sales were in San Rafael and Novato.

Markets with lower sales volumes often see more fluctuation in their median sales prices.

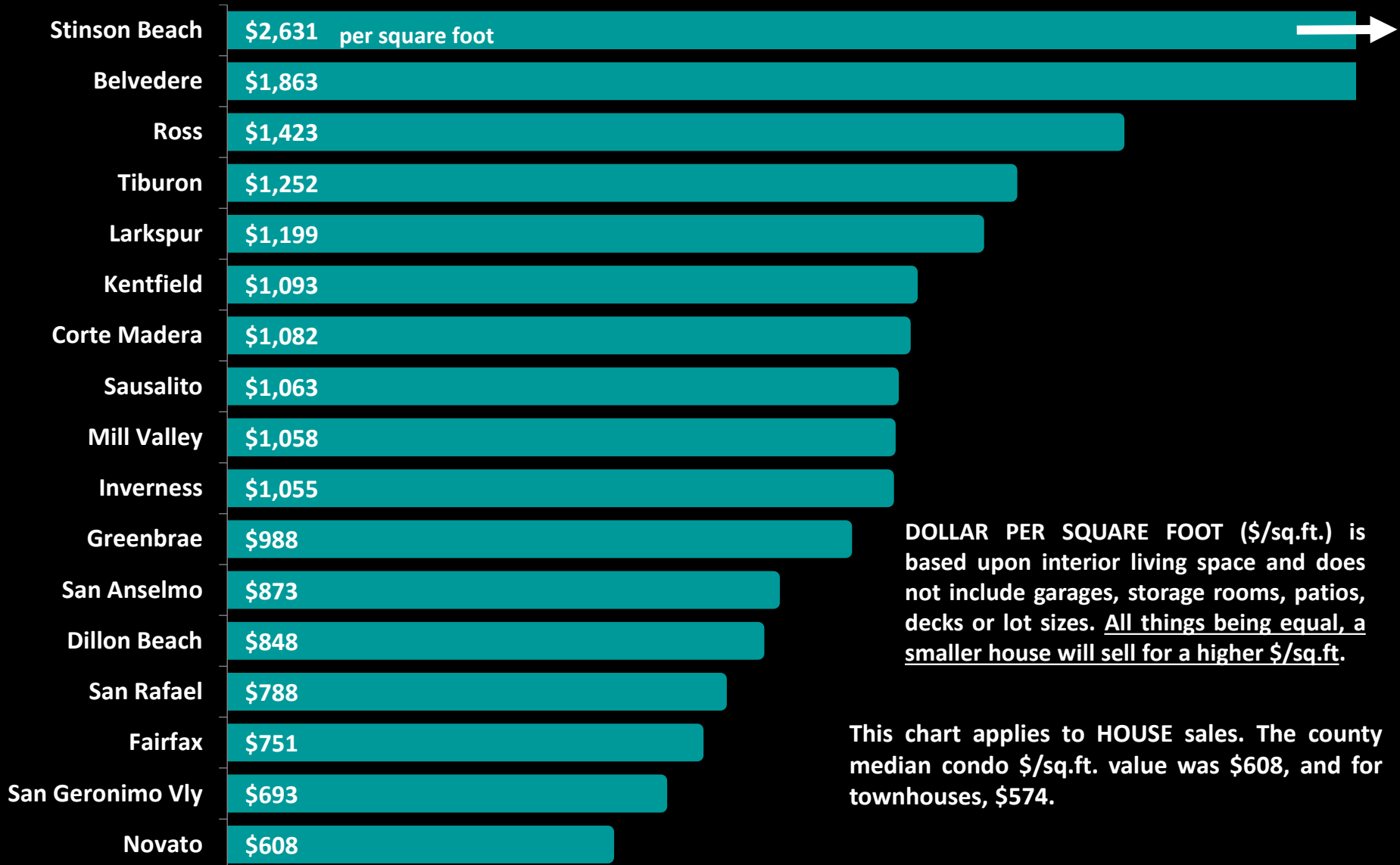
\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Data derived from sources deemed reliable but may contain errors and subject to revision. Not all sales are reported to MLS. All numbers approximate.

COMPASS

# Marin County Home Values

Median House \$/Sq.Ft. Values\*

12 Months Sales\*



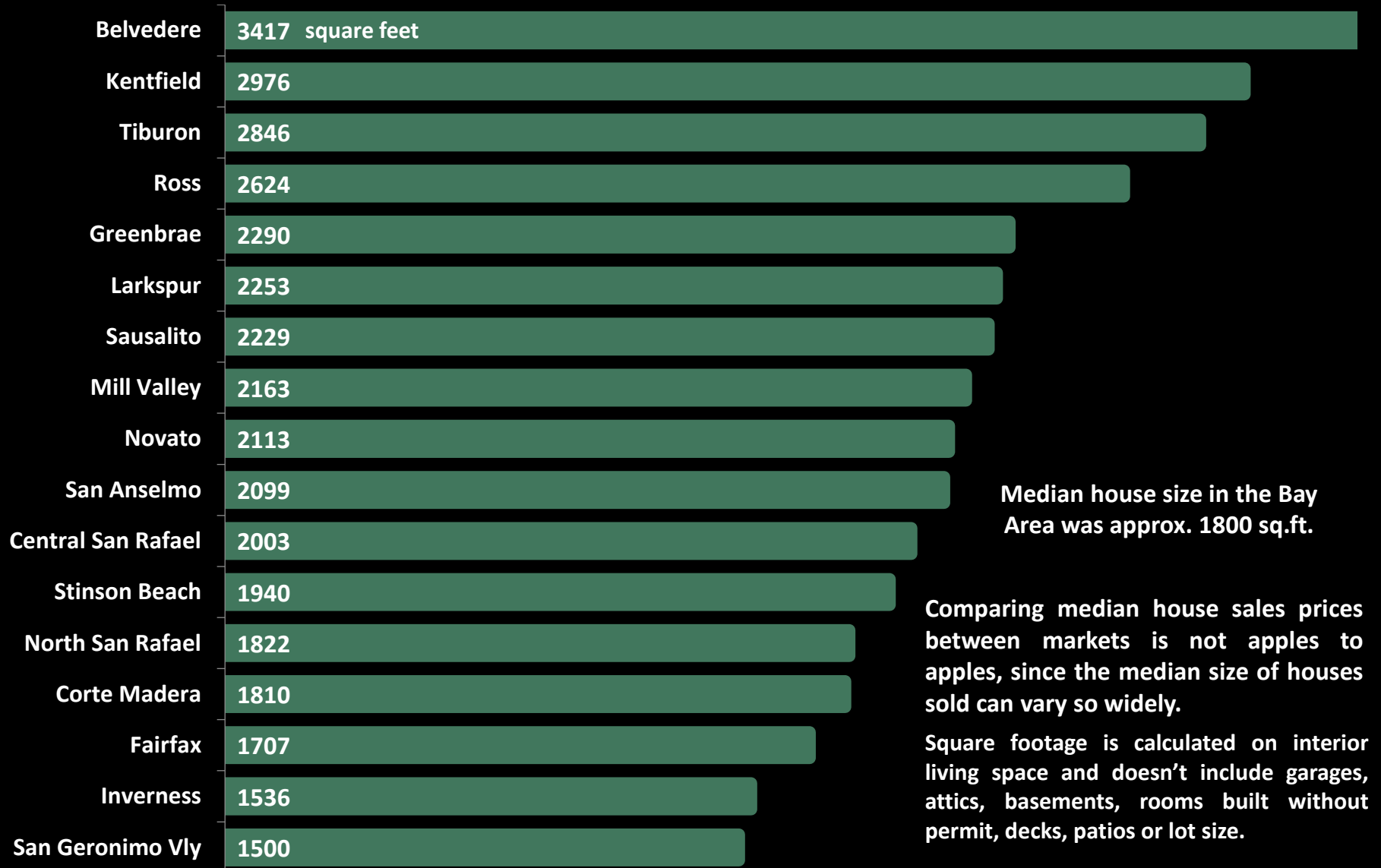
\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Data derived from sources deemed reliable but may contain errors and subject to revision. Not all sales are reported to MLS. All numbers approximate.

COMPASS

# Marin County Home Size

## Median House Square Footage\*

12 Months Sales\*



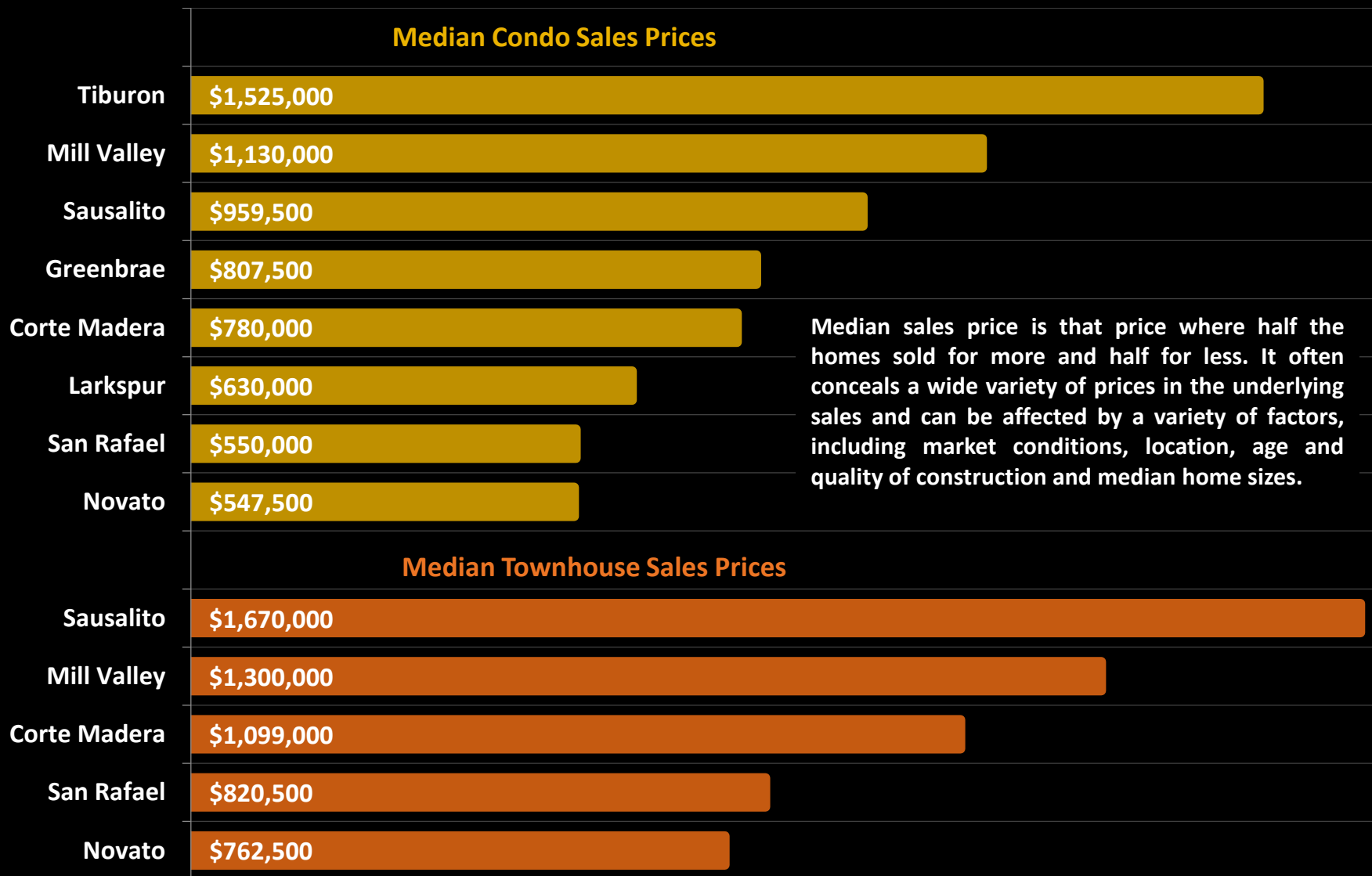
\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Data derived from sources deemed reliable but may contain errors and subject to revision. Not all sales are reported to MLS. All numbers approximate.

COMPASS

# Marin County Condo & Townhouse Markets

Median Sales Prices: Selected Cities\*

12 Months Sales\*



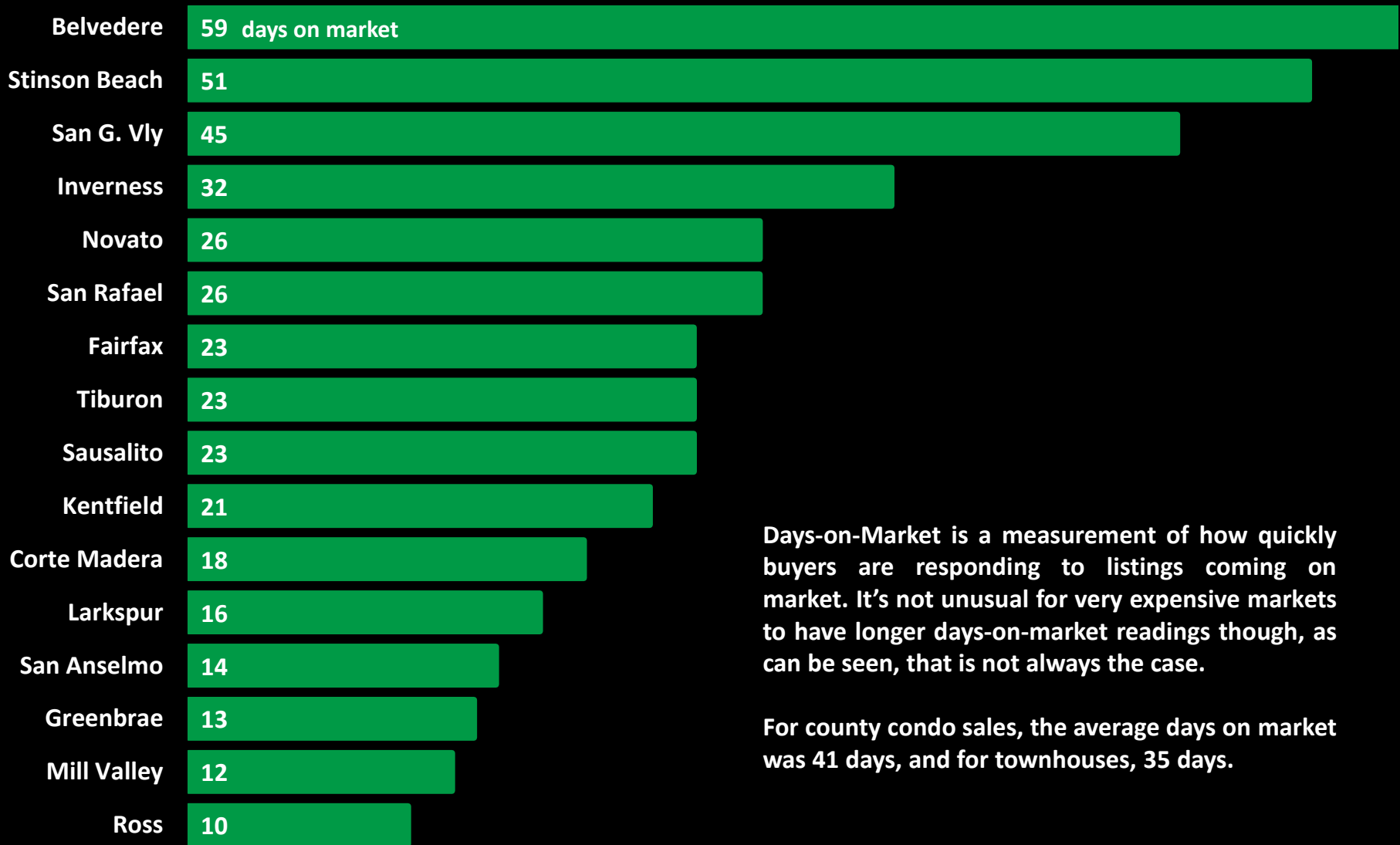
\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Does not include every city with condo or townhouse sales. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate. Not all sales are reported to MLS.

COMPASS

# Marin County House Market – Speed of Sale

Median Days on Market Prior to Acceptance of Offer\*

12 Months Sales\*



Days-on-Market is a measurement of how quickly buyers are responding to listings coming on market. It's not unusual for very expensive markets to have longer days-on-market readings though, as can be seen, that is not always the case.

For county condo sales, the average days on market was 41 days, and for townhouses, 35 days.

\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Data derived from sources deemed reliable but may contain errors and subject to revision. Not all sales are reported to MLS. All numbers approximate.

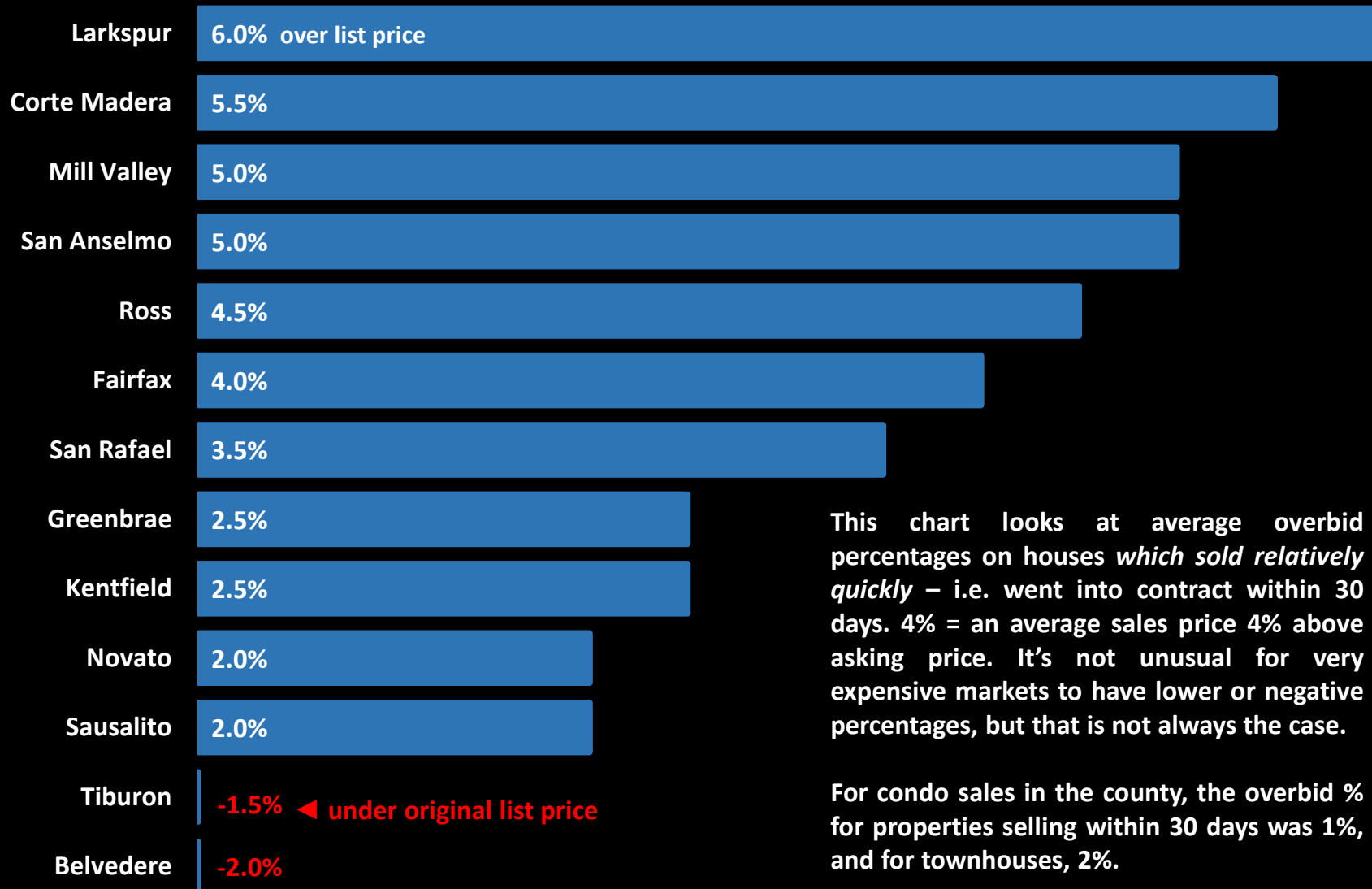
COMPASS



# Marin County: Overbidding Asking Price

For Those House Listings Accepting Offers Within 30 Days\*

12 Months Sales\*



This chart looks at average overbid percentages on houses *which sold relatively quickly* – i.e. went into contract within 30 days. 4% = an average sales price 4% above asking price. It's not unusual for very expensive markets to have lower or negative percentages, but that is not always the case.

For condo sales in the county, the overbid % for properties selling within 30 days was 1%, and for townhouses, 2%.

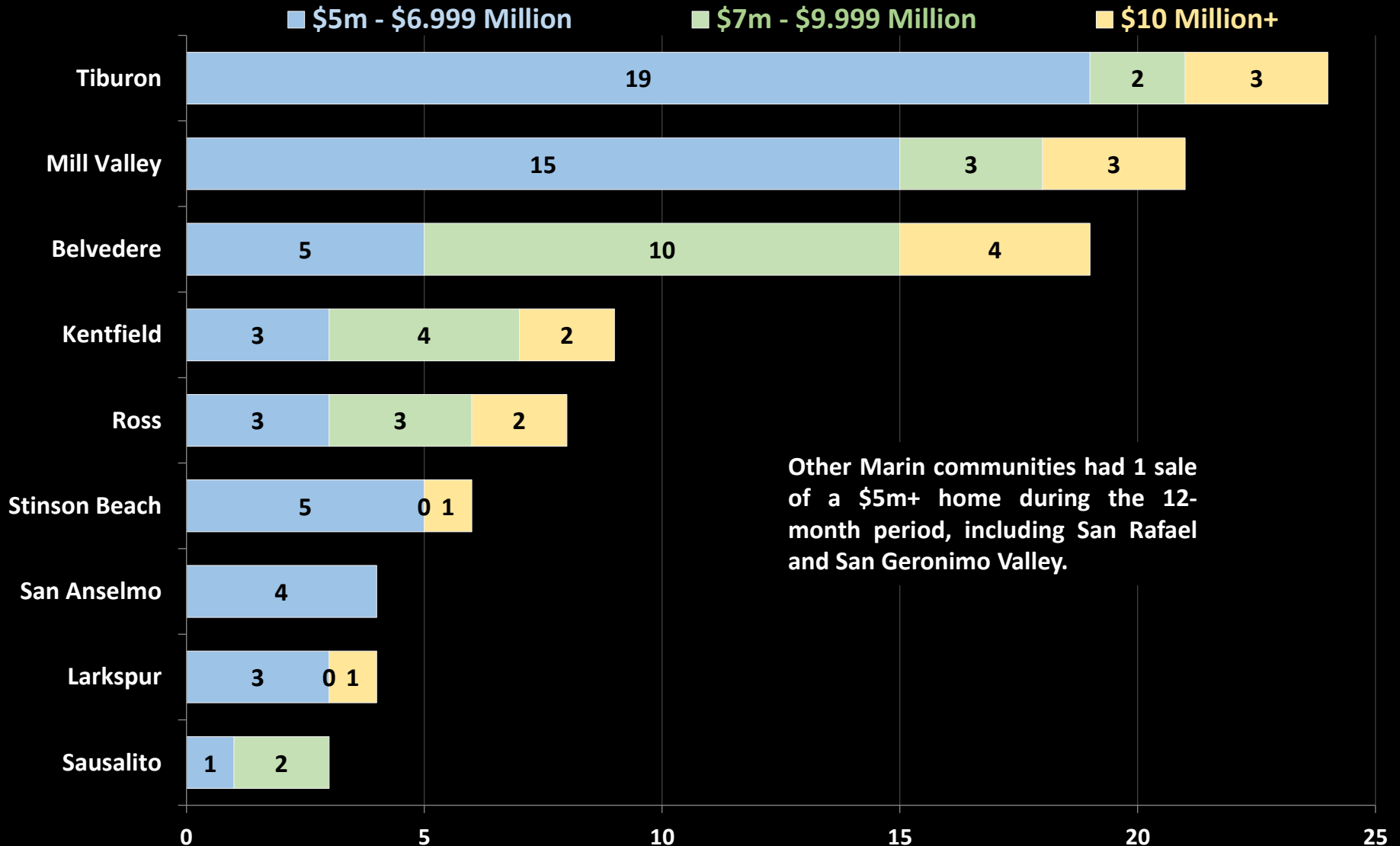
\*12 months sales reported to NorCal MLS Alliance by mid-December 2025. Data from sources deemed reliable but may contain errors and subject to revision. Not all sales are reported to MLS. Percentages rounded and all numbers approximate.

COMPASS



# Marin Luxury Home Market\*

Homes Selling for \$5,000,000+, 12 Months Sales\*



\*12 months sales by MLS Area reported to NorCal MLS Alliance by mid-December 2025. Not all luxury home sales are reported to MLS. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate. New sales activity is reported constantly.

COMPASS

## Median Sales Prices & Annual Appreciation Calculations

The 2025 median sales price calculations on the following annual-trend charts are based on calendar-year sales reported to NorCal MLS Alliance by early January 2026. They may vary from prices calculated from sales occurring in slightly different periods included in this report. They can also change as late-reported sales are entered into MLS: A few additional home sales – sometimes even one or two – may alter the median sales price, especially in smaller markets.

Median home sales prices are not like stock prices where each share sold is essentially the same product period to period: Median home prices are calculated using differing collections of *unique home sales occurring in each period measured*. There is no such thing as an unchanging “median house” whose change in value can be determined at different times. The median size of homes sold can sometimes vary significantly period to period, or within a city, sales in one neighborhood increase while declining in another. Sales in different price segments can be affected differently by economic circumstances such as interest rates or stock markets. All these situations can impact median sales prices in ways unrelated to fair market value.

Therefore, changes in median sales prices *are not exact measurements of area appreciation or depreciation, but using large datasets, they typically generate fairly reliable indicators of general trends in fair market values*. (Expensive markets with relatively small sales volumes occurring over wide ranges of sales prices are most prone to anomalous fluctuations in median prices.)

How median sales prices and appreciation calculations apply to any particular home is unknown without a specific comparative market analysis.

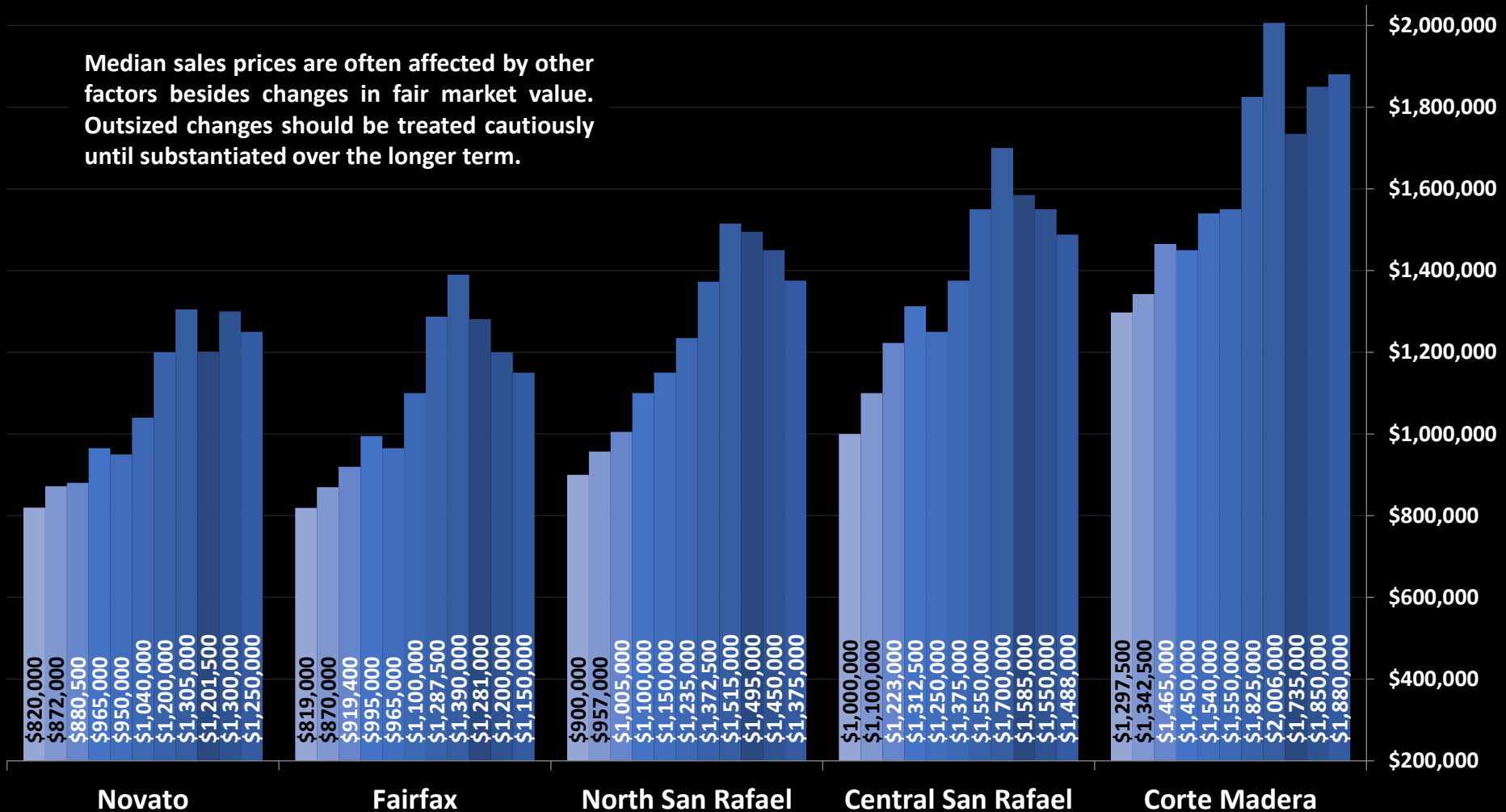
# Marin County Home Price Trends – Selected Cities

## Annual Median House Sales Prices since 2015

How these prices apply to any particular home is unknown without a specific comparative market analysis.

■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

Median sales prices are often affected by other factors besides changes in fair market value. Outsized changes should be treated cautiously until substantiated over the longer term.



Calendar-year sales reported to NorCal MLS Alliance by early January 2026. Median Sales Price is that price at which half the sales occurred for more and half for less. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate and may change with late-reported sales.

COMPASS

# Marin County Home Price Trends – Selected Cities

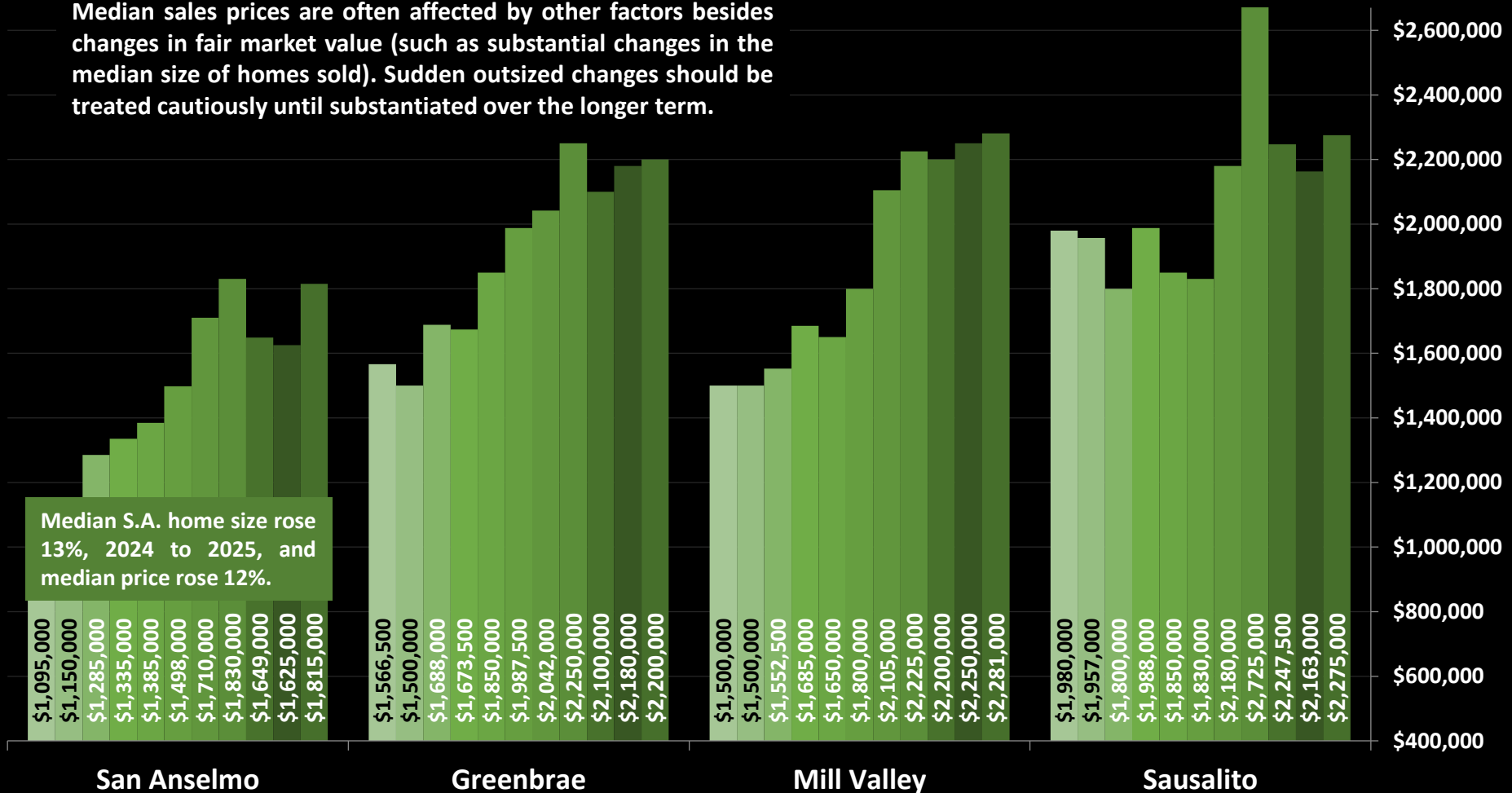
## Annual Median House Sales Prices since 2015

How these prices apply to any particular home is unknown without a specific comparative market analysis.

■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

Median sales prices are often affected by other factors besides changes in fair market value (such as substantial changes in the median size of homes sold). Sudden outsized changes should be treated cautiously until substantiated over the longer term.

Median S.A. home size rose 13%, 2024 to 2025, and median price rose 12%.



Calendar-year sales reported to NorCal MLS Alliance by early January 2026. Median Sales Price is that price at which half the sales occurred for more and half for less. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate and may change with late-reported sales.

COMPASS

# Marin County Home Price Trends – Selected Cities

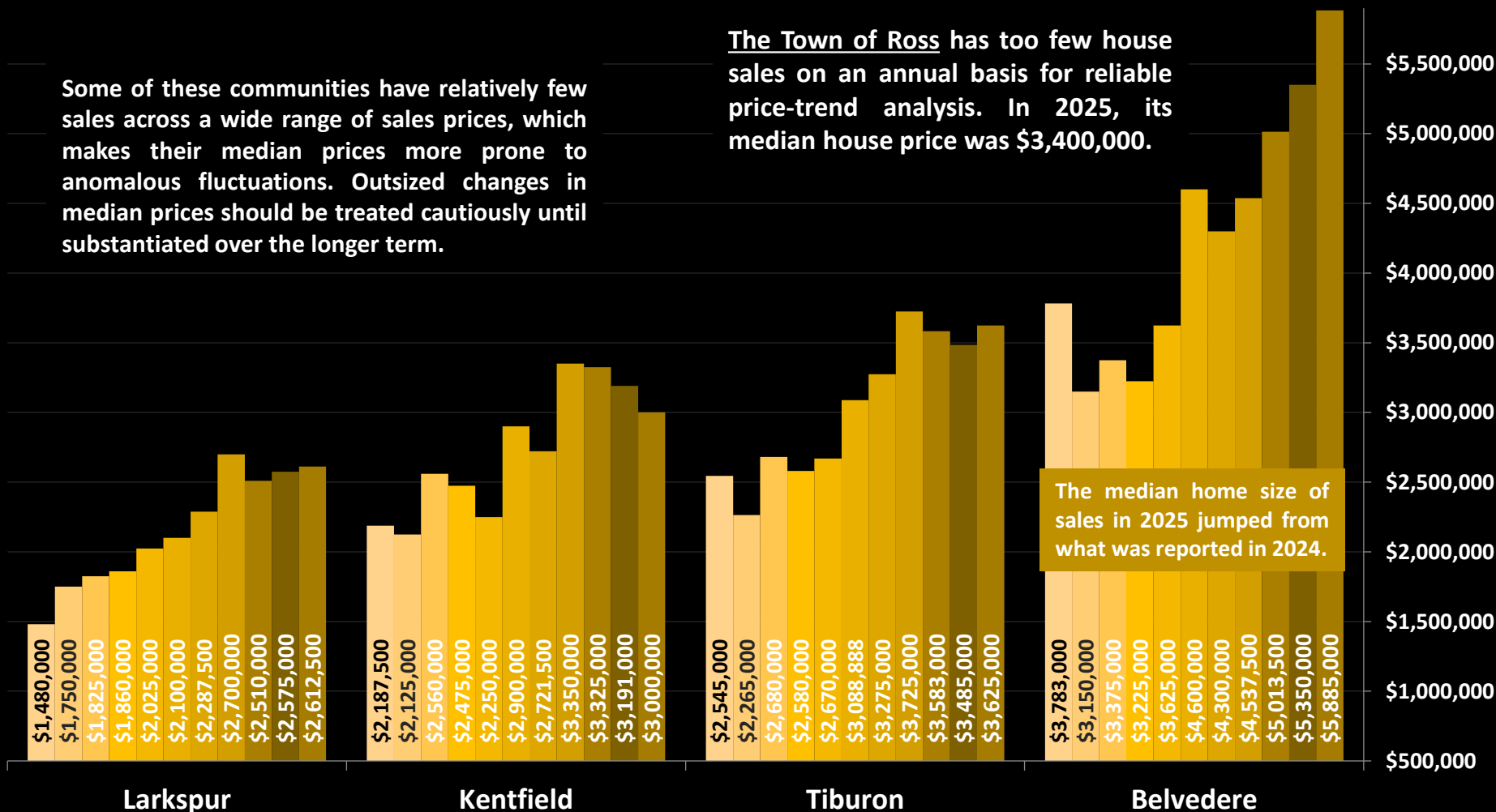
## Annual Median House Sales Prices since 2015

How these prices apply to any particular home is unknown without a specific comparative market analysis.

■ 2015 ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

Some of these communities have relatively few sales across a wide range of sales prices, which makes their median prices more prone to anomalous fluctuations. Outsized changes in median prices should be treated cautiously until substantiated over the longer term.

The Town of Ross has too few house sales on an annual basis for reliable price-trend analysis. In 2025, its median house price was \$3,400,000.



Calendar-year sales reported to NorCal MLS Alliance by early January 2026. Median Sales Price is that price at which half the sales occurred for more and half for less. Data from sources deemed reliable but may contain errors and subject to revision. All numbers are approximate and may change with late-reported sales.

COMPASS

# Bay Area Median House Values by County

## 2025 Sales By Bedroom/Bath Count\*

More expensive Marin: Ross/Kentfield & South.

More affordable Marin: San Anselmo/San Rafael & North

	4 Bedroom, 3 Bath Houses			5+ Bedroom, 4+ Bath Houses, 3000+ sq.ft.		
County In alphabetical order	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Sq.Ft./ Median Lot Size	Median Dollar per Square Foot
Alameda County	\$1,626,500	2195 sq.ft.	\$739/sq.ft.	\$2,750,000	3869 sq.ft. .25 acre	\$694/sq.ft.
Contra Costa	\$1,075,000	2338 sq.ft.	\$478/sq.ft.	\$2,650,000	3983 sq.ft. .37 acre	\$642/sq.ft.
More Expensive Marin County	\$2,850,000	2590 sq.ft.	\$1118/sq.ft.	\$4,850,000	4330 sq.ft. .50 acre	\$1089/sq.ft.
More Affordable Marin County	\$1,675,000	2430 sq.ft.	\$664/sq.ft.	\$2,600,000	3734 sq.ft. .36 acre	\$650/sq.ft.
Napa County	\$1,110,000	2307 sq.ft.	\$511/sq.ft.	\$4,000,000	4456 sq.ft. .54 acre	\$941/sq.ft.
San Francisco	\$2,200,000	2276 sq.ft.	\$974/sq.ft.	\$5,500,000	4270 sq.ft. .07 acre	\$1232/sq.ft.
San Mateo County	\$2,622,500	2310 sq.ft.	\$1103/sq.ft.	\$6,050,000	4545 sq.ft. .51 acre	\$1375/sq.ft.
Santa Clara County	\$2,210,000	2204 sq.ft.	\$1023/sq.ft.	\$4,620,000	3991 sq.ft. .31 acre	\$1158/sq.ft.
Santa Cruz County	\$1,550,000	2182 sq.ft.	\$677/sq.ft.	\$2,275,000	4122 sq.ft. 1.13 acres	\$616/sq.ft.
Solano County	\$700,500	2216 sq.ft.	\$317/sq.ft.	\$966,000	3680 sq.ft. .21 acre	\$279/sq.ft.
Sonoma County	\$920,000	2268 sq.ft.	\$423/sq.ft.	\$2,055,000	3964 sq.ft. .79 acre	\$513/sq.ft.

\*Sales reported to NorCal MLS Alliance in 2025 through mid-December 2025. Counties contain submarkets of widely varying values. "Fixer-uppers" excluded. Median values fluctuate for reasons besides changes in fair market value. Data from sources deemed reliable but may contain errors and subject to revision. All numbers approximate, and data constantly changes as new sales occur. Not all sales are reported to MLS.

**COMPASS**

# Bay Area Median House Values by County

## 2025 Sales By Bedroom/Bath Count\*

More expensive Marin: Ross/Kentfield & South.

More affordable Marin: San Anselmo/San Rafael & North

	2 Bedroom, 1-2 Bath Houses			3 Bedroom, 2 Bath Houses		
County In alphabetical order	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Square Footage	Median Dollar per Square Foot
Alameda County	\$785,000	1067 sq.ft.	\$735/sq.ft.	\$1,125,000	1428 sq.ft.	\$784/sq.ft.
Contra Costa	\$575,000	1019 sq.ft.	\$561/sq.ft.	\$725,000	1444 sq.ft.	\$528/sq.ft.
More Expensive Marin County	\$1,480,500	1320 sq.ft.	\$1197/sq.ft.	1,937,500	1686 sq.ft.	\$1131/sq.ft.
More Affordable Marin County	\$1,012,500	1169 sq.ft.	\$892/sq.ft.	\$1,258,000	1566 sq.ft.	\$790/sq.ft.
Napa County	\$787,000	1060 sq.ft.	\$775/sq.ft.	\$820,000	1447 sq.ft.	\$597/sq.ft.
San Francisco	\$1,318,000	1188 sq.ft.	\$1083/sq.ft.	\$1,587,000	1575 sq.ft.	\$1005/sq.ft.
San Mateo County	\$1,380,000	1080 sq.ft.	\$1292/sq.ft.	\$1,700,000	1510 sq.ft.	\$1153/sq.ft.
Santa Clara County	\$1,250,000	1058 sq.ft.	\$1197/sq.ft.	\$1,725,000	1383 sq.ft.	\$1249/sq.ft.
Santa Cruz County	\$855,000	1039 sq.ft.	\$792/sq.ft.	\$1,255,000	1600 sq.ft.	\$758/sq.ft.
Solano County	\$445,000	1216 sq.ft.	\$350/sq.ft.	\$549,000	1429 sq.ft.	\$388/sq.ft.
Sonoma County	\$695,000	1203 sq.ft.	\$577/sq.ft.	\$799,000	1518 sq.ft.	\$532/sq.ft.

\*Sales reported to NorCal MLS Alliance in 2025 through mid-December 2025. Counties contain submarkets of widely varying values. "Fixer-uppers" excluded. Median values fluctuate for reasons besides changes in fair market value. Data from sources deemed reliable but may contain errors and subject to revision. Numbers approximate, and data constantly changes as new sales occur. Not all sales are reported to MLS.

**COMPASS**



# Bay Area Median Condo & Townhouse Values

## 2025 Sales By Property Type & Bedroom/Bath Count\*

More expensive Marin: Ross/Kentfield & South.

More affordable Marin: San Anselmo/San Rafael & North

	2 Bedroom, 2 Bath Condos			3 Bedroom, 2-3 Bath Townhouses		
County In alphabetical order	Median Sales Price	Median Square Footage	Median Dollar per Square Foot	Median Sales Price	Median Square Footage	Median Dollar per Square Foot
Alameda County	\$600,000	1078 sq.ft.	\$558/sq.ft.	\$887,000	1519 sq.ft.	\$608/sq.ft.
Contra Costa	\$549,500	1134 sq.ft.	\$497/sq.ft.	\$789,000	1555 sq.ft.	\$524/sq.ft.
More Expensive Marin County	\$975,000	1187 sq.ft.	\$831/sq.ft.	\$1,480,500	1595 sq.ft.	\$891/sq.ft.
More Affordable Marin County	\$550,000	1112 sq.ft.	\$541/sq.ft.	\$845,000	1598 sq.ft.	\$506/sq.ft.
Napa County	\$967,500	1052 sq.ft.	\$929/sq.ft.	Too few sales		
San Francisco	\$1,258,000	1191 sq.ft.	\$1051/sq.ft.	Too few sales		
San Mateo County	\$865,500	1185 sq.ft.	\$742/sq.ft.	\$1,485,000	1625 sq.ft.	\$887/sq.ft.
Santa Clara County	\$780,000	1140 sq.ft.	\$694/sq.ft.	\$1,334,000	1571 sq.ft.	\$841/sq.ft.
Santa Cruz County	\$772,500	1141 sq.ft.	\$652/sq.ft.	\$976,000	1531 sq.ft.	\$635/sq.ft.
Solano County	\$360,000	1036 sq.ft.	\$340/sq.ft.	\$500,000	1480 sq.ft.	\$319/sq.ft.
Sonoma County	\$417,000	1065 sq.ft.	\$398/sq.ft.	\$535,000	1324 sq.ft.	\$386/sq.ft.

\*Sales reported to NorCal MLS Alliance in 2025 through mid-December 2025. Counties contain submarkets of widely varying values. "Fixer-uppers" excluded. Median values fluctuate for reasons besides changes in fair market value. Data from sources deemed reliable but may contain errors and subject to revision. Numbers approximate, and data constantly changes as new sales occur. Not all sales are reported to MLS.

**COMPASS**



Click Here for Marin County  
Home Price Map

COMPASS





**[Click Here to Access All Compass  
Bay Area Market Reports](#)**

**COMPASS**

Statistics are generalities, essentially summaries of widely disparate data generated by dozens, hundreds or thousands of unique, individual sales occurring within different time periods. They are best seen not as precise measurements, but as broad, comparative indicators, with reasonable margins of error. Anomalous fluctuations in statistics are not uncommon, especially in smaller, expensive market segments. Last period data should be considered estimates that may change with late-reported data. Different analytics programs sometimes define statistics – such as “active listings,” “days on market,” and “months supply of inventory” – differently: what is most meaningful are not specific calculations but the *trends* they illustrate. Most listing and sales data derives from the local or regional multi-listing service (MLS) of the area specified in the analysis, but not all listings or sales are reported to MLS and these won’t be reflected in the data. “Homes” signifies real-property, single-household housing units: houses, condos, co-ops, townhouses, duets and TICs (but not mobile homes), as applicable to each market. City/town names refer specifically to the named cities and towns or MLS-defined areas, unless otherwise delineated. Multi-county metro areas will be specified as such. Data from sources deemed reliable but may contain errors and subject to revision. All numbers to be considered approximate.

Many aspects of value cannot be adequately reflected in median and average statistics: curb appeal, age, condition, amenities, views, lot size, quality of outdoor space, “bonus” rooms, additional parking, quality of location *within* the neighborhood, and so on. How any of these statistics apply to any particular home is unknown without a specific comparative market analysis.

Median Sales Price is that price at which half the properties sold for more and half for less. It may be affected by seasonality, “unusual” events, or changes in inventory and buying trends, as well as by changes in fair market value. The median sales price for an area will often conceal an enormous variety of sales prices in the underlying individual sales.

Dollar per Square Foot is based upon the home’s interior living space and does not include garages, unfinished attics and basements, rooms built without permit, patios, decks or yards (though all those can add value to a home). These figures are usually derived from appraisals or tax records, but are sometimes unreliable (especially for older homes) or unreported altogether. The calculation can only be made on those home sales that reported square footage.

Photo use under the Creative Commons License: <https://creativecommons.org/licenses/by-sa/2.0/>

*Compass is a real estate broker licensed by the State of California, DRE 01527235. Equal Housing Opportunity. This report has been prepared solely for information purposes. The information herein is based on or derived from information generally available to the public and/or from sources believed to be reliable. No representation or warranty can be given with respect to the accuracy or completeness of the information. Compass disclaims any and all liability relating to this report, including without limitation any express or implied representations or warranties for statements contained in, and omissions from, the report. Nothing contained herein is intended to be or should be read as any regulatory, legal, tax, accounting or other advice and Compass does not provide such advice. All opinions are subject to change without notice. Compass makes no representation regarding the accuracy of any statements regarding any references to the laws, statutes or regulations of any state are those of the author(s). Past performance is no guarantee of future results.*