

TW Q2  
20  
23

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

QUARTERLY  
**DATA REPORT**

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## Q2 2023 REGIONAL REPORT

Welcome back fellow Regional real estate enthusiasts. Alright, let's dive into the latest report ...

Q2 endured the persistence of upward pricing, led predominantly by a notable 7-10% Q over Q increase in the Region's major urban areas. Defying the intended consequence, continued interest rate hikes appear to have done little to dissuade buyer confidence in our local market. Broken record warning here, but the primary culprit behind this upward momentum remains the persistent lack of supply in our Region. Just ask anyone looking to rent a home.

While we can not directly impact supply here at TW, we can spot a glimmer of hope on the horizon for home prices. If we follow the trend, we can firmly anticipate that in Q3 we will witness positive year-over-year numbers for the first time in many Q's. While increased prices may sound counter-intuitive to a better market for everyone, it should draw some would-be home sellers out of hibernation and work to ease some of this persistent supply pressure. It also provides developers with a little more pep in their step to move forward confidently with major new projects in our community. Here's hoping.

We are also optimistic for another reason - politicians, decision-makers, city councillors and pretty much everyone we run into on the street is talking about the Region's housing problems. This is how you begin to fix a problem. There are a multitude of reasons why things are what they are here now, but standing around talking about who is to blame does zero to fix the actual problem. Regardless of who you agree with or who you don't, the only way this gets fixed is to keep politicians accountable to their words and listen to community stakeholders you trust, not those with an agenda. Get involved, share your ideas, have an open mind to others and be part of the solution - it all adds up to a better community.

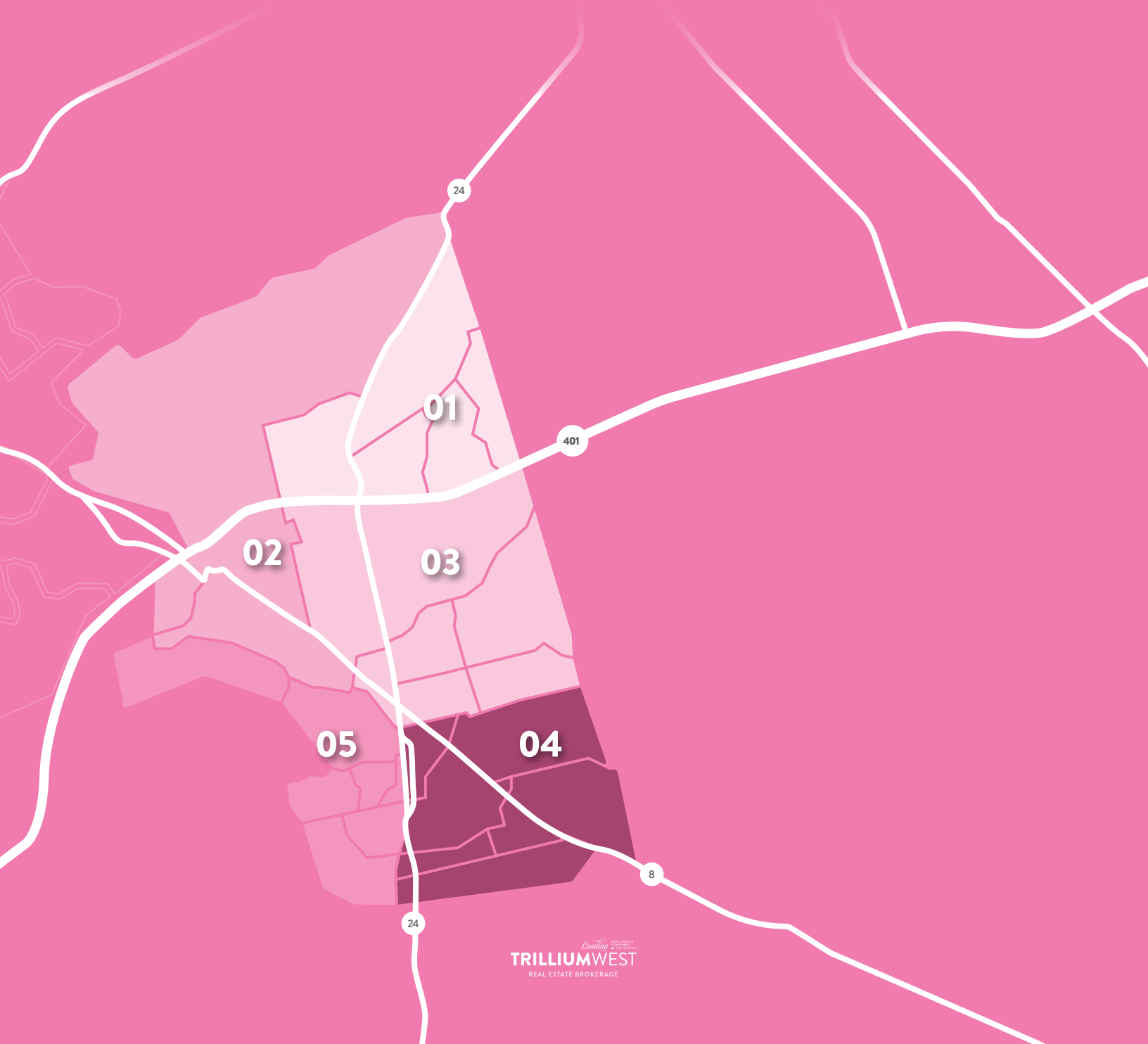
In conclusion, Q2 leaves us with some optimism. The data displays some market stability and stability leads to progress. Let's hope progress leads us in the direction of long-term solutions.

Yours in the pursuit of Regional real estate enlightenment,

The TW Team

# CAMBRIDGE OVERVIEW

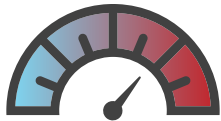
HESPELER	01
PRESTON	02
NORTH GALT	03
EAST GALT	04
WEST GALT	05



## COMPLETE DATA CAMBRIDGE

### Q2 | SALES TO NEW LISTING RATIO

BETWEEN 0.4 AND 0.6 IS  
CONSIDERED A BALANCED MARKET



0.71

	Q2   2023	% Chg (Y)	Q2   2022	% Chg (Q)	Q1   2023
MEDIAN DET. SALE PRICE	\$832,000	0.4% ▼	\$835,000	74% ▲	\$775,000
NUMBER OF NEW SALES	549	79% ▼	596	65.4% ▲	332
MEDIAN DAYS ON MARKET	8	=	8	3 days ▼	11
NEW INVENTORY	777	13.9% ▼	903	70.4% ▲	456

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

### UP & DOWN QUICK REVIEW

▲7%

Q/Q change in Cambridge-wide median detached price. Up 14% YTD.

▼27%

Drop in Q/Q days on market. The return of a hot market means fewer conditions.

▲13.67%

Q/Q increase in median sale price for East Galt. The highest in the city.

▼32%

Decline in Y/Y in Hespler inventory. Builders are turning off the inventory tap.

▲4.75%

Jump in prime interest rate July 2022 vs July 2023.

▼19%

Decrease in Y/Y North Galt sales. When inventory drops, sales drop commensurately.

▲20%

Q/Q boast in median detached price for North Galt- The GTA buyer still driving this market.

▼3.5%

Y/Y fall in Preston median sale price. The rebound is slower here than other areas in Cambridge

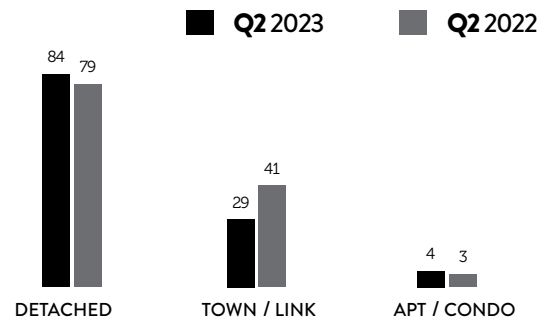
# HESPELER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$749,900	117	163	0.72	\$805,000
<b>Q2 2022</b>   TOTAL	\$749,900	123	240	0.51	\$820,000
% CHANGE (+/-)	=	4.9% ▼	32.1% ▼	40.1% ▲	1.8% ▼
<b>Q1 2023</b>   TOTAL	\$717,500	70	92	0.76	\$771,000
% CHANGE (+/-)	4.5% ▲	67.1% ▲	77.2% ▲	5.7% ▼	4.4% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	112	152	▼
TOWN / LINK HOMES	39	85	▼
APARTMENT / CONDO	12	3	▲
TOTAL	163	240	▼
SALES TO NEW RATIO	0.72	0.51	▲

## Q2 SALES BY INVENTORY TYPE

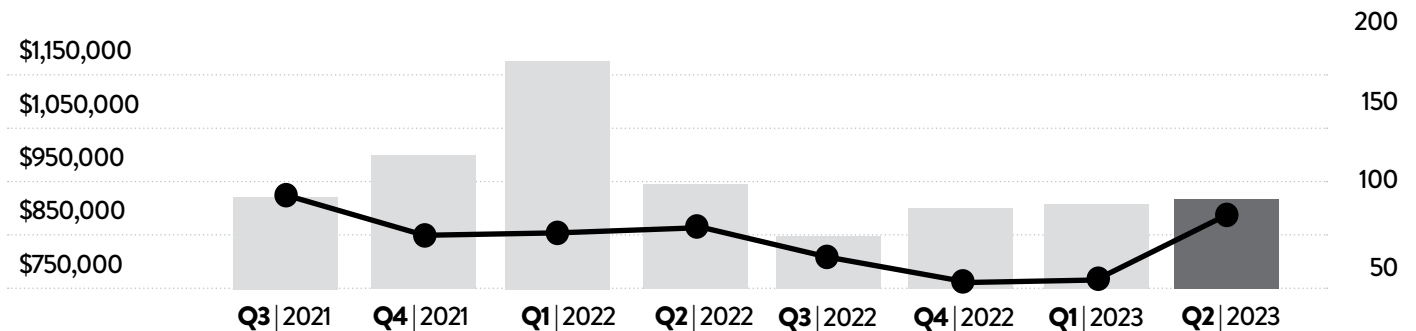


**\$865,000**  
DETACHED MEDIAN SALE

**\$700,000**  
TOWN / LINK MEDIAN SALE

**\$494,500**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



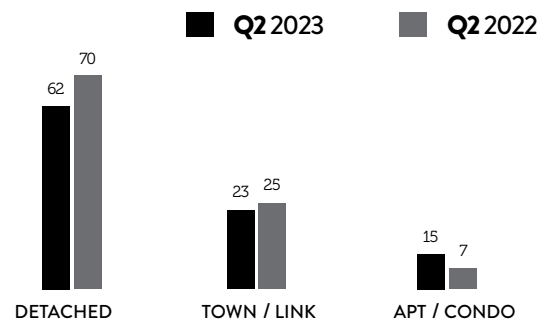
# PRESTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$617,000	100	131	0.76	\$690,000
<b>Q2 2022</b>   TOTAL	\$649,900	102	158	0.65	\$714,950
% CHANGE (+/-)	5.1% ▼	2.0% ▼	17.1% ▼	18.3% ▲	3.5% ▼
<b>Q1 2023</b>   TOTAL	\$629,900	43	63	0.68	\$652,500
% CHANGE (+/-)	2.1% ▼	132.6% ▲	1079% ▲	11.8% ▲	5.8% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	81	99	▼
TOWN / LINK HOMES	36	48	▼
APARTMENT / CONDO	14	11	▲
TOTAL	131	158	▼
SALES TO NEW RATIO	0.76	0.65	▲

## Q2 SALES BY INVENTORY TYPE



**\$772,500**

DETACHED MEDIAN SALE

**\$605,000**

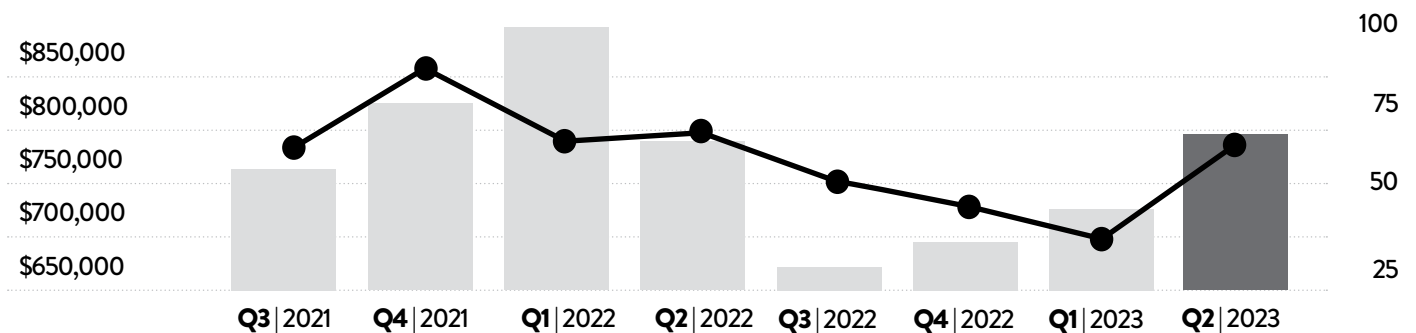
TOWN / LINK MEDIAN SALE

**\$511,000**

APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE

## # OF MEDIAN DET. SALES



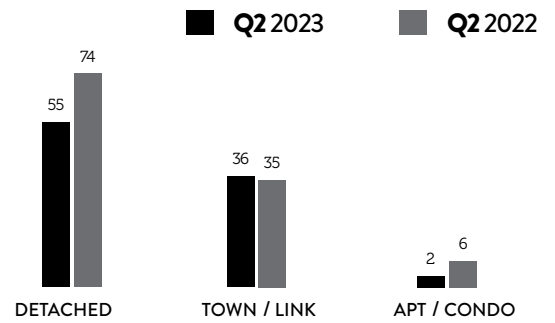
# NORTH GALT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$649,900	93	132	0.70	\$740,000
<b>Q2 2022</b>   TOTAL	\$699,900	115	166	0.69	\$765,000
% CHANGE (+/-)	71% ▼	19.1% ▼	20.5% ▼	1.7% ▲	3.3% ▼
<b>Q1 2023</b>   TOTAL	\$679,950	64	85	0.75	\$705,000
% CHANGE (+/-)	4.4% ▼	45.3% ▲	55.3% ▲	6.4% ▼	5.0% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	77	104	▼
TOWN / LINK HOMES	52	55	▼
APARTMENT / CONDO	3	7	▼
TOTAL	132	166	▼
SALES TO NEW RATIO	0.70	0.69	▲

## Q2 SALES BY INVENTORY TYPE

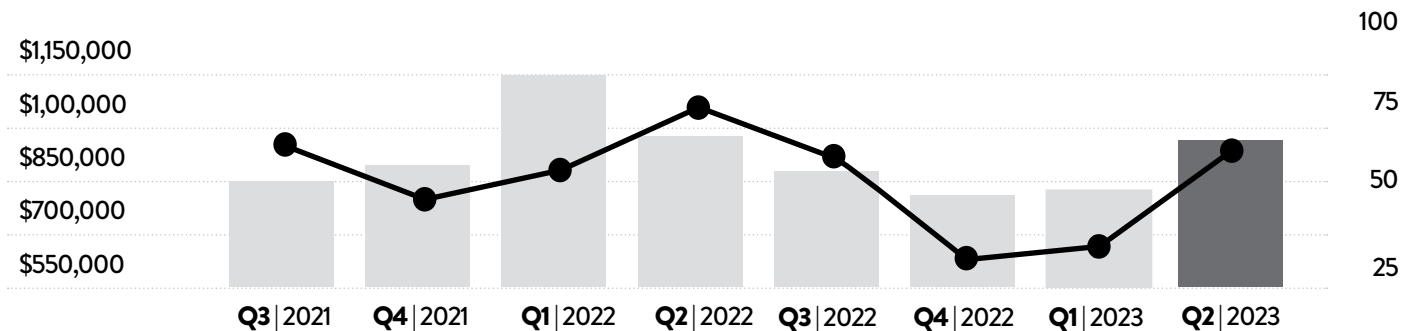


**\$898,888**  
DETACHED MEDIAN SALE

**\$627,500**  
TOWN / LINK MEDIAN SALE

**\$582,500**  
APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES





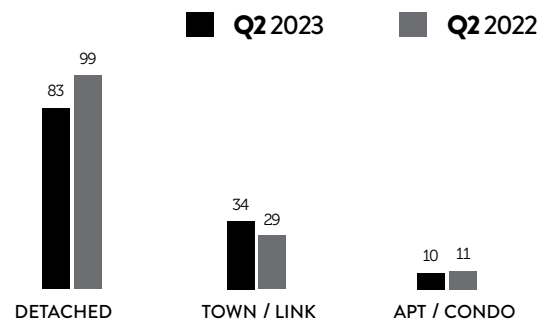
# EAST GALT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$675,000	127	178	0.71	\$750,000
<b>Q2 2022</b>   TOTAL	\$699,900	139	219	0.63	\$750,000
% CHANGE (+/-)	3.6% ▼	8.6% ▼	18.7% ▼	12.4% ▲	=
<b>Q1 2023</b>   TOTAL	\$677,000	92	114	0.81	\$683,250
% CHANGE (+/-)	0.3% ▼	38.0% ▲	56.1% ▲	11.6% ▼	9.8% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	111	154	▼
TOWN / LINK HOMES	48	47	▲
APARTMENT / CONDO	19	18	▲
TOTAL	178	219	▼
SALES TO NEW RATIO	0.71	0.63	▲

## Q2 SALES BY INVENTORY TYPE

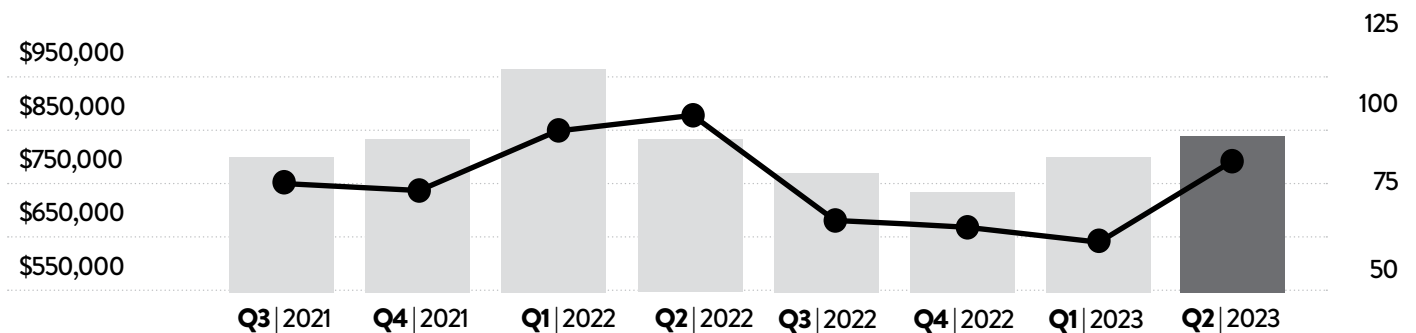


**\$787,000**  
DETACHED MEDIAN SALE

**\$724,500**  
TOWN / LINK MEDIAN SALE

**\$490,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



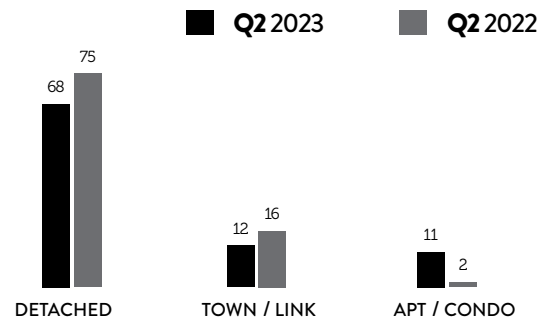
# WEST GALT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$739,900	91	127	0.72	\$811,333
<b>Q2 2022</b>   TOTAL	\$700,000	93	138	0.67	\$825,000
% CHANGE (+/-)	5.7% ▲	2.2% ▼	8.0% ▼	6.3% ▲	17% ▼
<b>Q1 2023</b>   TOTAL	\$699,450	54	79	0.68	\$713,750
% CHANGE (+/-)	5.8% ▲	68.5% ▲	60.8% ▲	4.8% ▲	13.7% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	87	113	▼
TOWN / LINK HOMES	22	22	=
APARTMENT / CONDO	18	3	▲
TOTAL	127	138	▼
SALES TO NEW RATIO	0.72	0.67	▲

## Q2 SALES BY INVENTORY TYPE

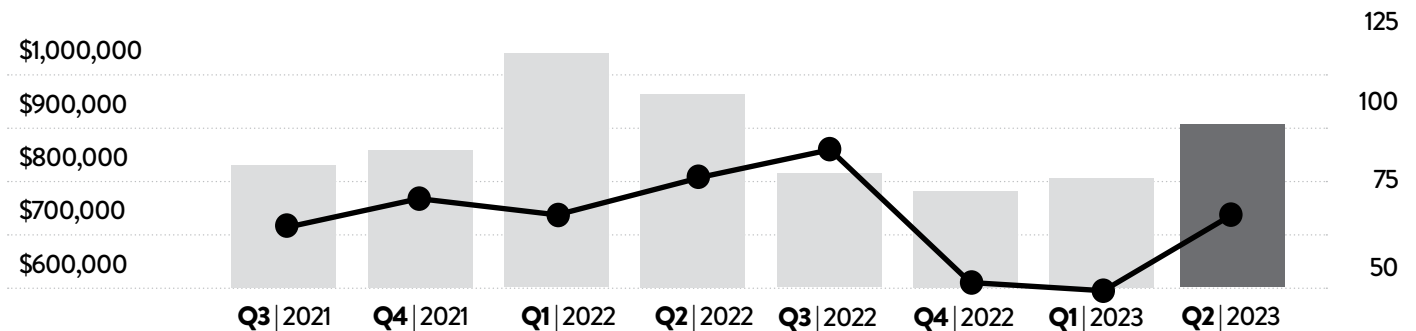


**\$853,750**  
DETACHED MEDIAN SALE

**\$755,000**  
TOWN / LINK MEDIAN SALE

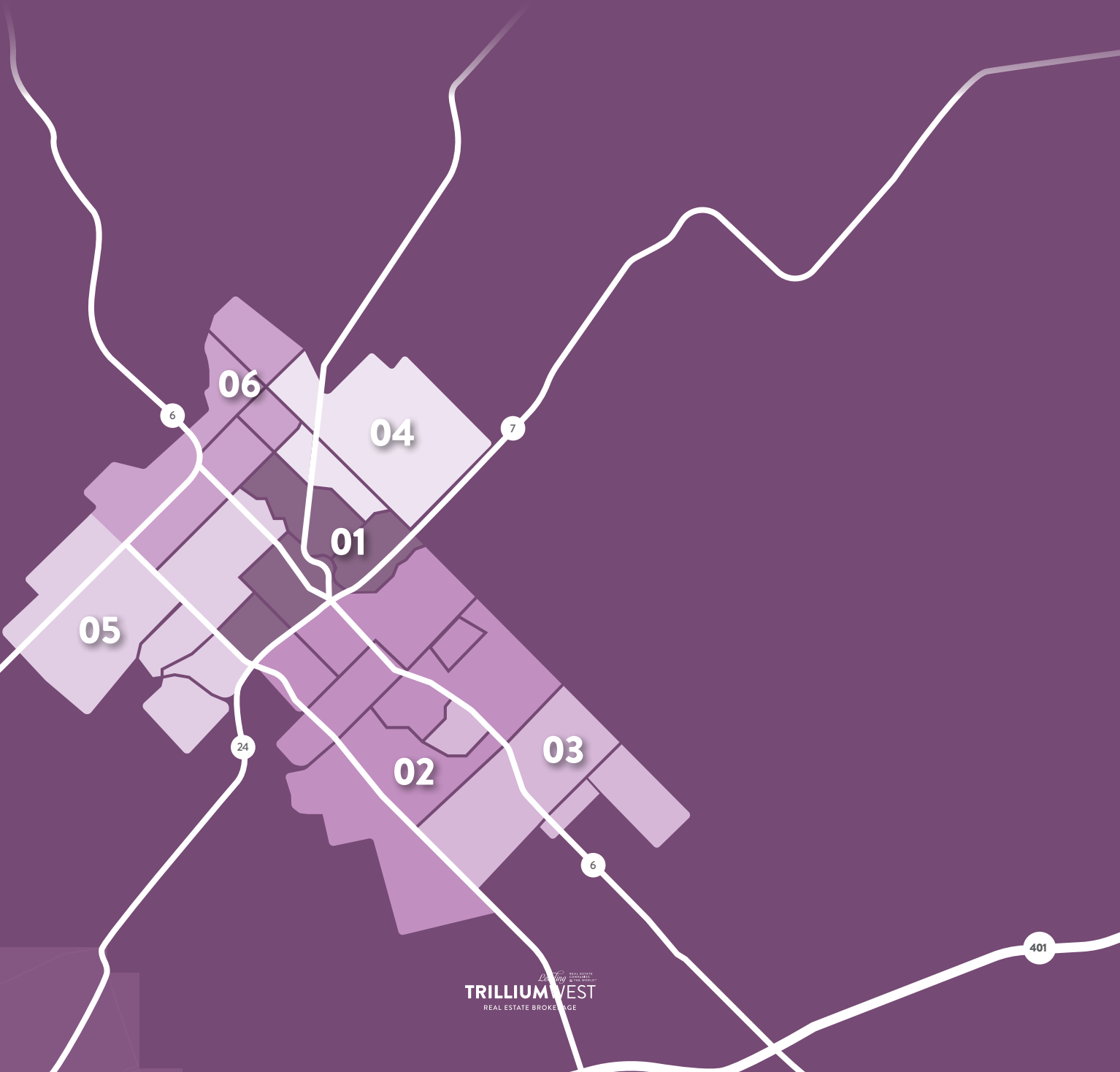
**\$500,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



# GUELPH OVERVIEW

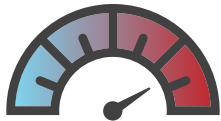
DOWNTOWN	01
MIDTOWN	02
SOUTH GUELPH	03
EAST GUELPH	04
WEST GUELPH	05
NORTH GUELPH	06



COMPLETE DATA  
GUELPH

Q2 | SALES TO  
NEW LISTING  
RATIO

BETWEEN 0.4 AND 0.6 IS  
CONSIDERED A BALANCED MARKET



0.79

	Q2   2023	% Chg (Y)	Q2   2022	% Chg (Q)	Q1   2023
MEDIAN DET. SALE PRICE	\$930,000	2.5% ▼	\$953,700	10.7% ▲	\$840,000
NUMBER OF NEW SALES	572	0.4% ▲	570	35.9% ▲	421
MEDIAN DAYS ON MARKET	9	=	9	4 days ▼	13
NEW INVENTORY	723	19.7% ▼	900	28.0% ▲	565

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

UP & DOWN  
QUICK REVIEW

▲10.71% Increase in city wide Y/Y detached price. The highest in the Region

▼16.9% Fall in Y/Y inventory in Downtown. Sales remained on par with 2022, hence the price bump.

▲35.87% Jump in Q/Q sales. Sales outpacing inventory = sellers market.

▼35.16% Decrease in Y/Y North Guelph inventory. New builds slowing down.

▲18% Bump in Downtown Q/Q median detached price. A post Covid return to the core.

▼7.42% Decline in Q/Q list to sale ratio in West Guelph. One of the few areas that saw the market soften from Q1 to Q2.

▲11.62% Surge in Midtown Q/Q median sale price. The second area to rejoin the \$1M club

▼0% Change in Guelph building more homes anytime soon.

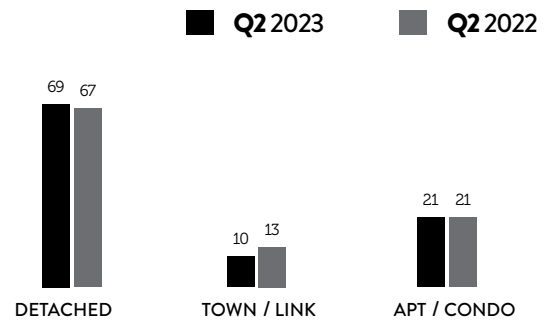
# DOWNTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$759,950	100	118	0.85	\$776,500
<b>Q2 2022</b>   TOTAL	\$780,000	101	142	0.71	\$800,000
% CHANGE (+/-)	2.6% ▼	1.0% ▼	16.9% ▼	19.1% ▲	2.9% ▼
<b>Q1 2023</b>   TOTAL	\$699,900	74	115	0.64	\$680,000
% CHANGE (+/-)	8.6% ▲	35.1% ▲	2.6% ▲	31.7% ▲	14.2% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	73	91	▼
TOWN / LINK HOMES	11	20	▼
APARTMENT / CONDO	34	31	▲
TOTAL	118	142	▼
SALES TO NEW RATIO	0.85	0.71	▲

## Q2 SALES BY INVENTORY TYPE

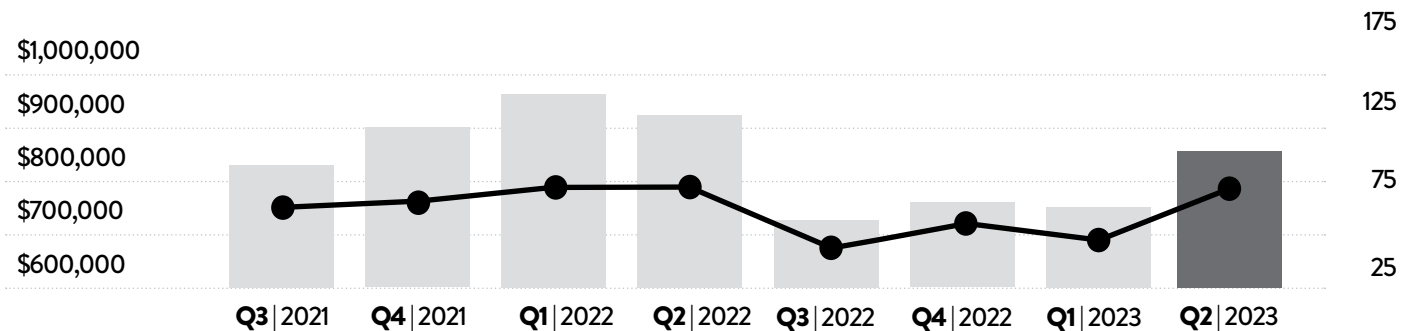


**\$837,500**  
DETACHED MEDIAN SALE

**\$673,107**  
TOWN / LINK MEDIAN SALE

**\$535,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



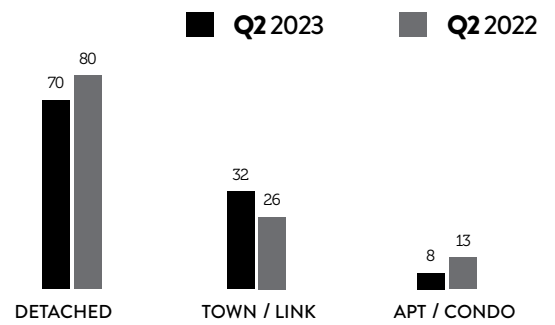
# MIDTOWN GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$899,900	110	156	0.71	\$931,500
<b>Q2 2022</b>   TOTAL	\$899,900	119	210	0.57	\$977,500
% CHANGE (+/-)	=	76% ▼	25.7% ▼	24.4% ▲	4.7% ▼
<b>Q1 2023</b>   TOTAL	\$814,450	82	120	0.68	\$834,500
% CHANGE (+/-)	10.5% ▲	34.1% ▲	30.0% ▲	3.2% ▲	11.6% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	97	124	▼
TOWN / LINK HOMES	48	58	▼
APARTMENT / CONDO	11	28	▼
TOTAL	156	210	▼
SALES TO NEW RATIO	0.71	0.57	▲

## Q2 SALES BY INVENTORY TYPE

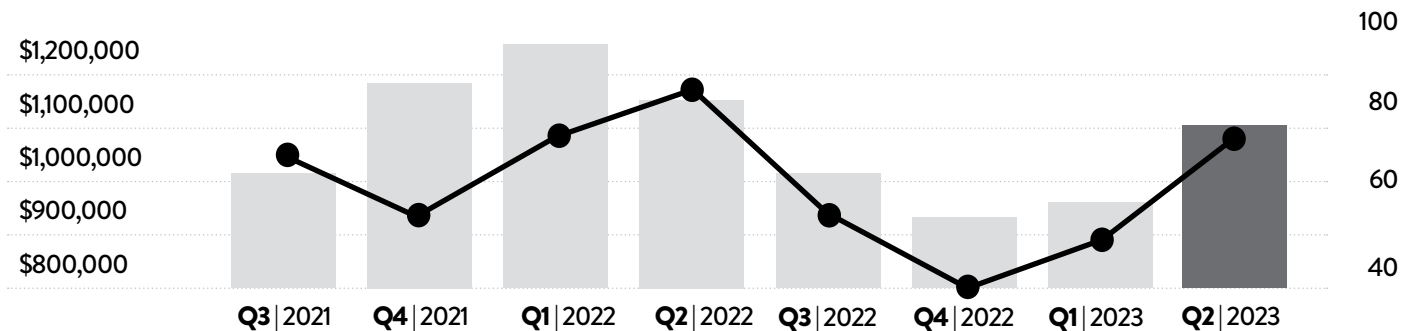


**\$1,075,000**  
DETACHED MEDIAN SALE

**\$736,500**  
TOWN / LINK MEDIAN SALE

**\$802,500**  
APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE & # OF MEDIAN DET. SALES



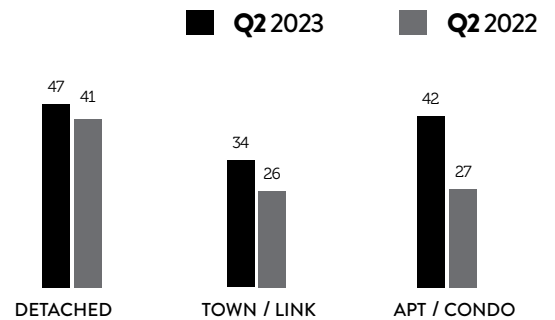
# SOUTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$834,900	123	150	0.82	\$825,000
<b>Q2 2022</b>   TOTAL	\$899,900	94	162	0.58	\$908,750
% CHANGE (+/-)	72% ▼	30.8% ▲	74% ▼	41.3% ▲	92% ▼
<b>Q1 2023</b>   TOTAL	\$699,000	91	118	0.77	\$685,000
% CHANGE (+/-)	19.4% ▲	35.2% ▲	27.1% ▲	6.3% ▲	20.4% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	60	63	▼
TOWN / LINK HOMES	37	42	▼
APARTMENT / CONDO	53	57	▼
TOTAL	150	162	▼
SALES TO NEW RATIO	0.82	0.58	▲

## Q2 SALES BY INVENTORY TYPE

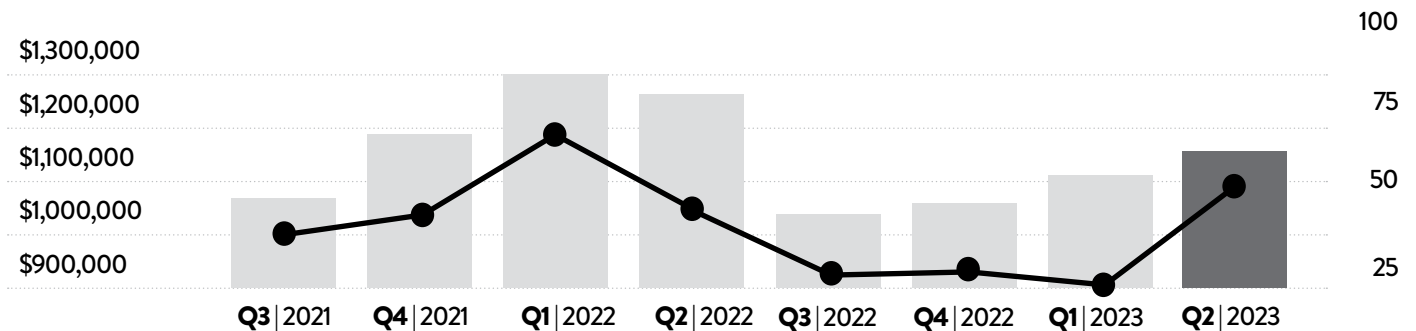


**\$1,100,000**  
DETACHED MEDIAN SALE

**\$763,150**  
TOWN / LINK MEDIAN SALE

**\$550,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



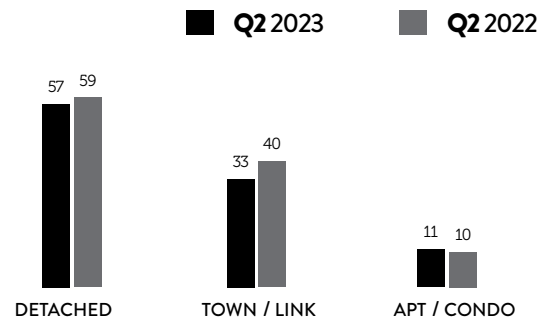
# EAST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$789,900	101	134	0.75	\$801,000
<b>Q2 2022</b>   TOTAL	\$799,900	109	175	0.62	\$850,000
% CHANGE (+/-)	12% ▼	73% ▼	23.4% ▼	21.0% ▲	5.8% ▼
<b>Q1 2023</b>   TOTAL	\$725,000	74	90	0.82	\$730,000
% CHANGE (+/-)	8.9% ▲	36.5% ▲	48.9% ▲	8.3% ▼	9.7% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	70	91	▼
TOWN / LINK HOMES	54	68	▼
APARTMENT / CONDO	10	16	▼
TOTAL	134	175	▼
SALES TO NEW RATIO	0.75	0.62	▲

## Q2 SALES BY INVENTORY TYPE

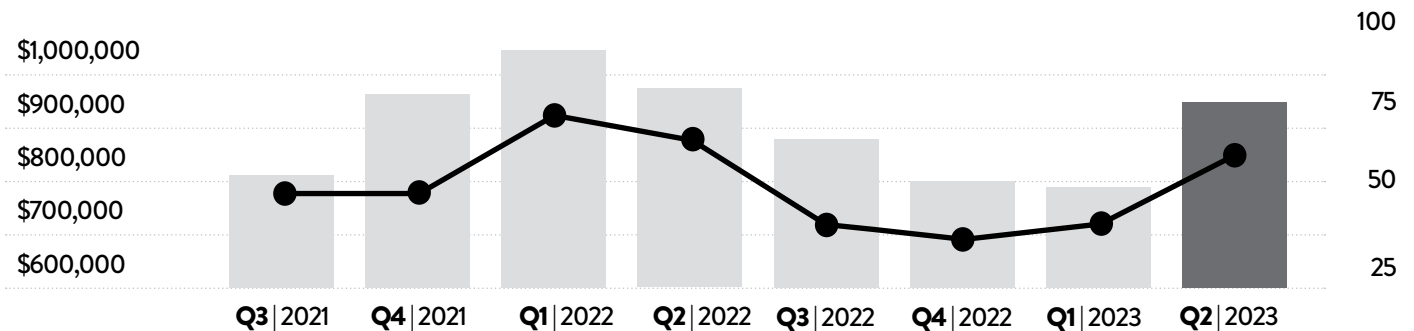


**\$900,000**  
DETACHED MEDIAN SALE

**\$787,000**  
TOWN / LINK MEDIAN SALE

**\$535,000**  
APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES





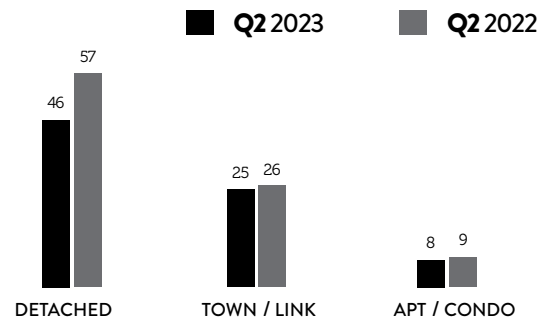
# WEST GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$769,900	79	100	0.79	\$781,000
<b>Q2 2022</b>   TOTAL	\$769,850	92	128	0.72	\$795,000
% CHANGE (+/-)	0.01% ▲	14.1% ▼	21.9% ▼	9.9% ▲	18% ▼
<b>Q1 2023</b>   TOTAL	\$649,450	64	75	0.85	\$679,000
% CHANGE (+/-)	18.5% ▲	23.4% ▲	33.3% ▲	74% ▼	15.0% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	51	73	▼
TOWN / LINK HOMES	35	37	▼
APARTMENT / CONDO	14	18	▼
TOTAL	100	128	▼
SALES TO NEW RATIO	0.79	0.72	▲

## Q2 SALES BY INVENTORY TYPE

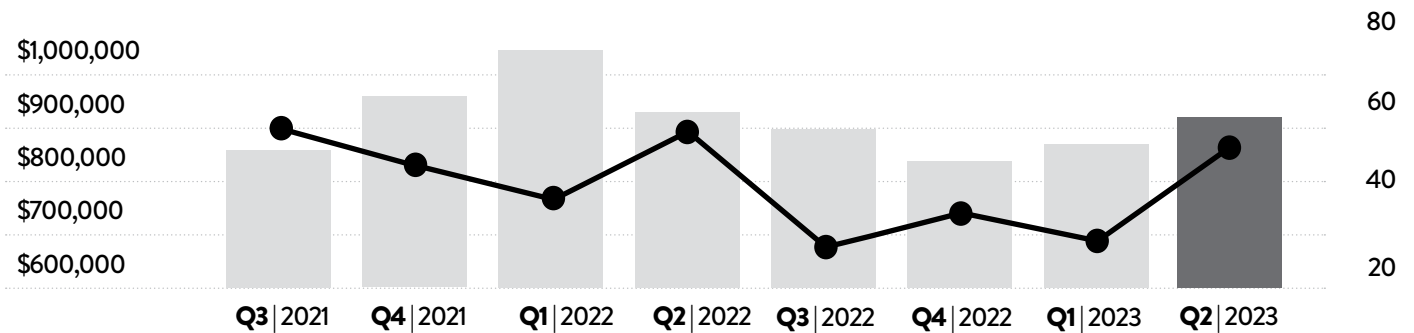


**\$870,000**  
DETACHED MEDIAN SALE

**\$575,000**  
TOWN / LINK MEDIAN SALE

**\$424,950**  
APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE & # OF MEDIAN DET. SALES



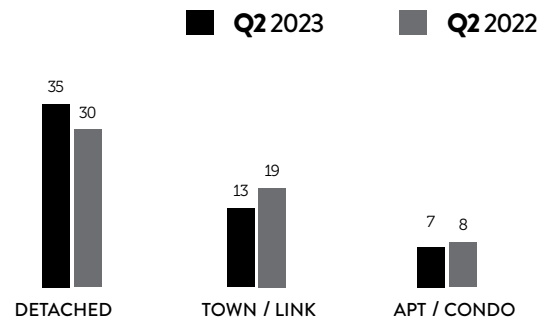
# NORTH GUELPH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$799,000	55	59	0.93	\$806,000
<b>Q2 2022</b>   TOTAL	\$799,900	57	91	0.63	\$795,000
% CHANGE (+/-)	0.1% ▼	3.5% ▼	35.2% ▼	48.8% ▲	1.4% ▲
<b>Q1 2023</b>   TOTAL	\$794,950	38	50	0.76	\$788,500
% CHANGE (+/-)	0.5% ▲	44.7% ▲	18.0% ▲	22.7% ▲	2.2% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	37	54	▼
TOWN / LINK HOMES	12	31	▼
APARTMENT / CONDO	10	6	▲
TOTAL	59	91	▼
SALES TO NEW RATIO	0.93	0.63	▲

## Q2 SALES BY INVENTORY TYPE

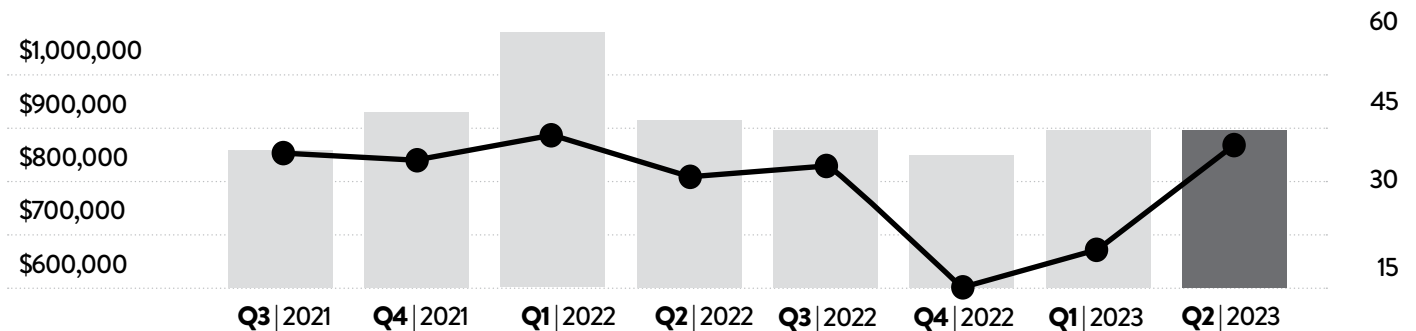


**\$850,000**  
DETACHED MEDIAN SALE

**\$599,900**  
TOWN / LINK MEDIAN SALE

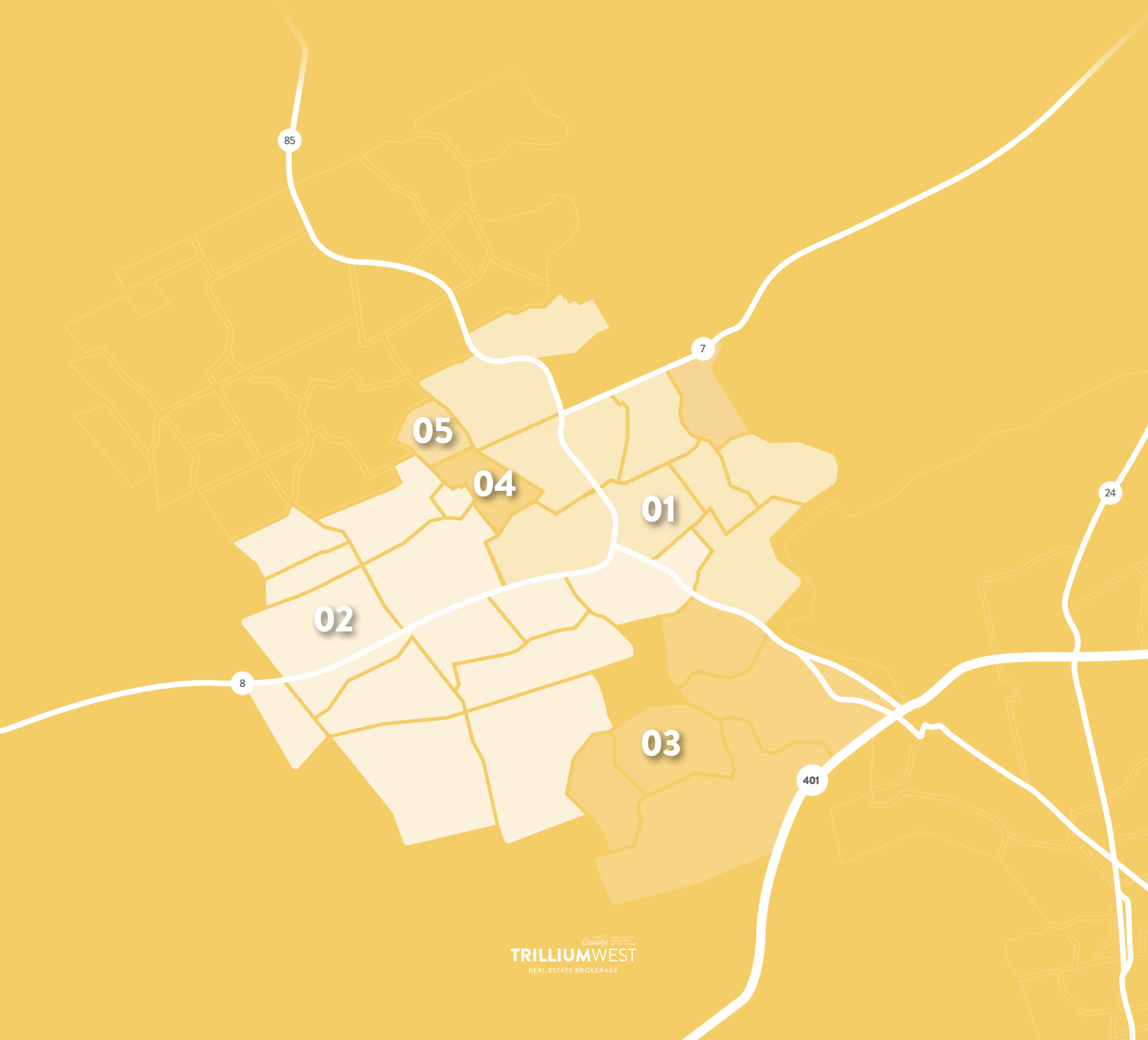
**\$519,900**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



# KITCHENER OVERVIEW

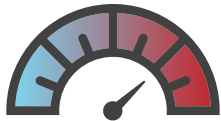
EAST KITCHENER	01
WEST KITCHENER	02
SOUTH KITCHENER	03
DOWNTOWN	04
MIDTOWN	05



## COMPLETE DATA KITCHENER

### Q2 | SALES TO NEW LISTING RATIO

BETWEEN 0.4 AND 0.6 IS  
CONSIDERED A BALANCED MARKET



0.73

	Q2   2023	% Chg (Y)	Q2   2022	% Chg (Q)	Q1   2023
MEDIAN DET. SALE PRICE	\$880,000	2.2% ▼	\$900,000	8.6% ▲	\$809,935
NUMBER OF NEW SALES	930	12.8% ▼	1067	68.2% ▲	553
MEDIAN DAYS ON MARKET	8	=	8	2 days ▼	10
NEW INVENTORY	1268	272% ▼	1743	61.5% ▲	785

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

## UP & DOWN QUICK REVIEW

▲8.65% Jump in Kitchener Q/Q median detached second only to Guelph.

▼33% Plummet in Y/Y West Kitchener inventory. Builders putting on the brakes.

▲9.77% Increase in South Kitchener Q/Q median sales price. The only Kitchener neighborhood to surpass the elusive \$1M threshold.

▼11.85% Decline in Y/Y median price for Downtown. The condo inventory dump is still being felt but we are finally trending in the right direction.

▲24% Climb in Y/Y Downtown condo inventory. One of the few market segments seeing an increase in inventory but sales are also up year over year.

▼0% Change in Y/Y median list price for East and West Kitchener. Price it low and let it roll seems to still be the motto of the day.

▲18.13% Increase in East Kitchener Y/Y list to sale ratio. Sales out pacing inventory.

▼6% Drop in Q/Q South Kitchener median condo price. Downtown options are starting to look more appealing.

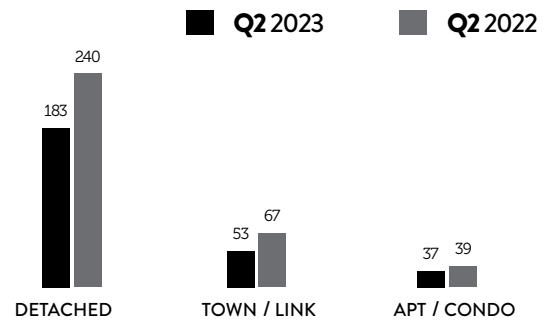
# EAST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$699,900	273	358	0.76	\$775,000
<b>Q2 2022</b>   TOTAL	\$699,900	346	536	0.65	\$803,000
% CHANGE (+/-)	=	21.1% ▼	33.2% ▼	18.1% ▲	3.5% ▼
<b>Q1 2023</b>   TOTAL	\$727,450	172	233	0.74	\$723,750
% CHANGE (+/-)	38% ▼	58.7% ▲	53.7% ▲	3.3% ▲	7.1% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	248	398	▼
TOWN / LINK HOMES	69	82	▼
APARTMENT / CONDO	41	56	▼
TOTAL	358	536	▼
SALES TO NEW RATIO	0.76	0.65	▲

## Q2 SALES BY INVENTORY TYPE

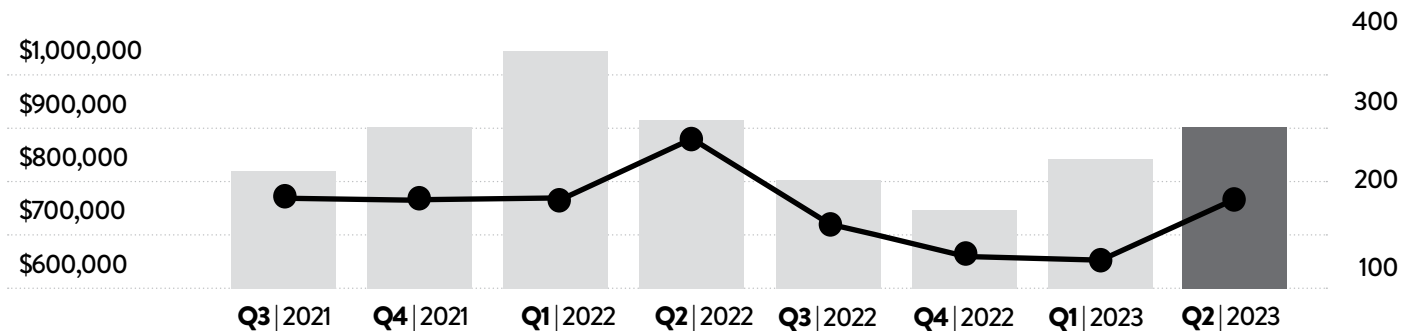


**\$850,000**  
DETACHED MEDIAN SALE

**\$665,000**  
TOWN / LINK MEDIAN SALE

**\$405,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



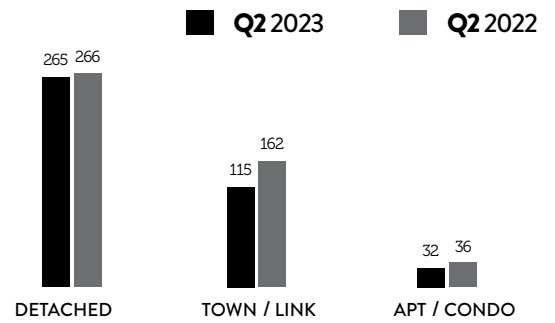
# WEST KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$699,000	412	516	0.80	\$773,250
<b>Q2 2022</b>   TOTAL	\$699,900	464	770	0.60	\$760,000
% CHANGE (+/-)	0.1% ▼	11.2% ▼	323.0% ▼	32.5% ▲	1.7% ▲
<b>Q1 2023</b>   TOTAL	\$675,000	257	326	0.79	\$695,000
% CHANGE (+/-)	3.6% ▲	60.3% ▲	58.3% ▲	1.3% ▲	11.3% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	320	448	▼
TOWN / LINK HOMES	139	267	▼
APARTMENT / CONDO	57	55	▲
TOTAL	516	770	▼
SALES TO NEW RATIO	0.80	0.60	▲

## Q2 SALES BY INVENTORY TYPE

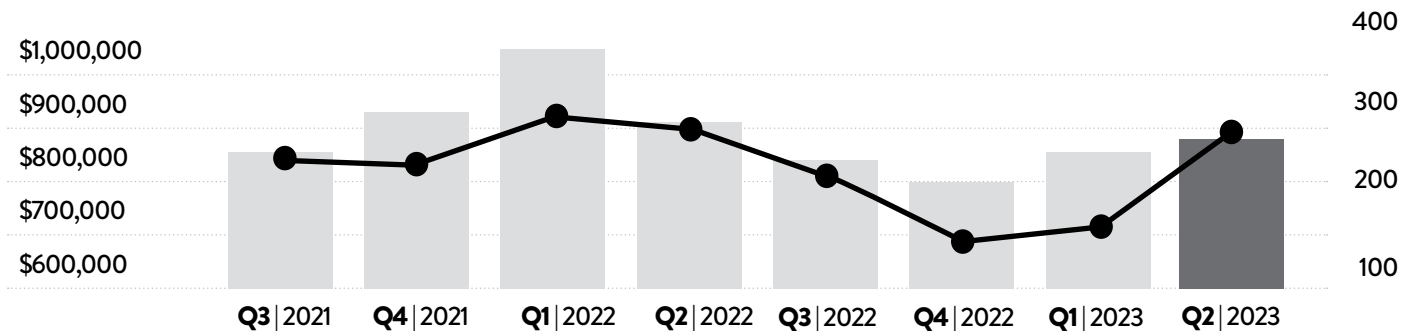


**\$831,200**  
DETACHED MEDIAN SALE

**\$642,000**  
TOWN / LINK MEDIAN SALE

**\$400,750**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES





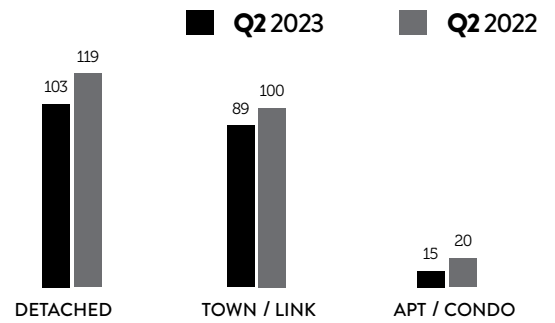
# SOUTH KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$771,950	207	302	0.69	\$842,500
<b>Q2 2022</b>   TOTAL	\$799,900	239	413	0.58	\$870,000
% CHANGE (+/-)	3.5% ▼	13.4% ▼	26.9% ▼	18.4% ▲	3.2% ▼
<b>Q1 2023</b>   TOTAL	\$722,450	122	179	0.68	\$767,500
% CHANGE (+/-)	6.8% ▲	69.7% ▲	68.7% ▲	0.6% ▲	9.8% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	166	215	▼
TOWN / LINK HOMES	122	165	▼
APARTMENT / CONDO	14	33	▼
TOTAL	302	413	▼
SALES TO NEW RATIO	0.69	0.58	▲

## Q2 SALES BY INVENTORY TYPE

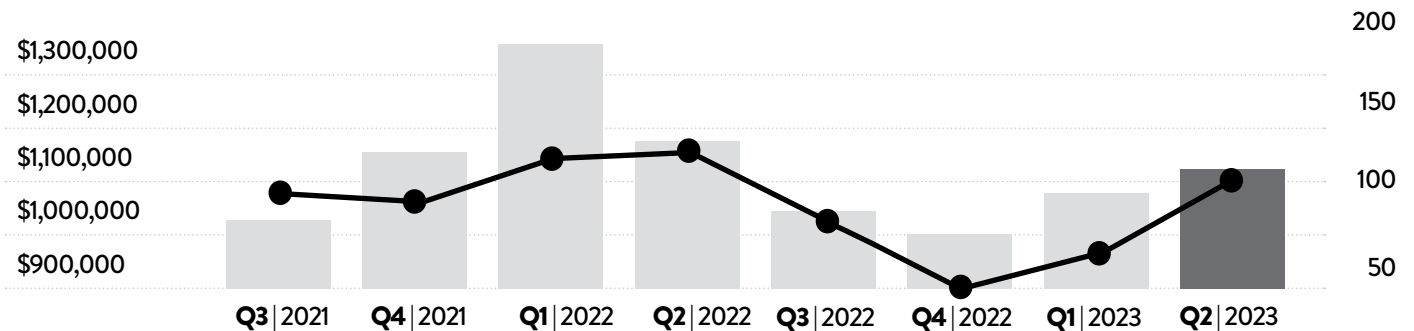


**\$1,084,000**  
DETACHED MEDIAN SALE

**\$705,000**  
TOWN / LINK MEDIAN SALE

**\$420,000**  
APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE █ # OF MEDIAN DET. SALES



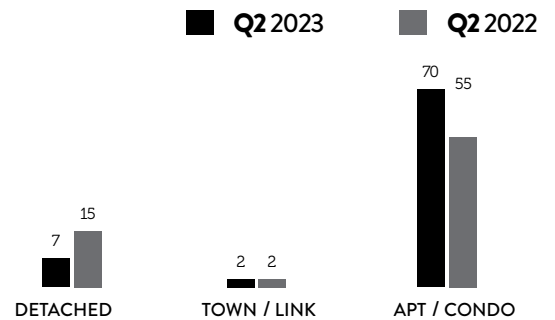
# DOWNTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$479,900	79	142	0.56	\$480,000
<b>Q2 2022</b>   TOTAL	\$499,949	72	123	0.59	\$544,500
% CHANGE (+/-)	4.0% ▼	9.7% ▲	15.4% ▲	5.0% ▼	11.8% ▼
<b>Q1 2023</b>   TOTAL	\$459,500	34	88	0.39	\$445,500
% CHANGE (+/-)	4.4% ▲	132.3% ▲	61.4% ▲	44.0% ▲	77% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	14	25	▼
TOWN / LINK HOMES	13	5	▲
APARTMENT / CONDO	115	93	▲
TOTAL	142	123	▲
SALES TO NEW RATIO	0.56	0.59	▼

## Q2 SALES BY INVENTORY TYPE

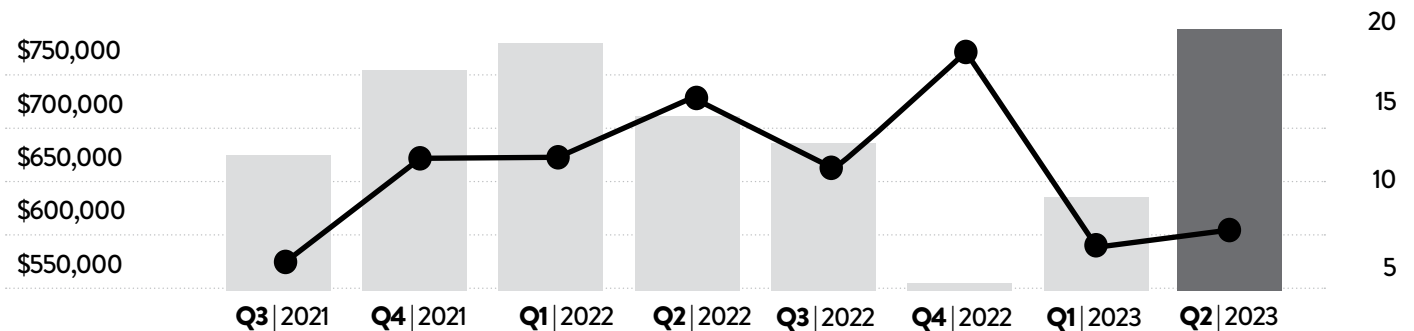


**\$760,000**  
DETACHED MEDIAN SALE

**\$699,388**  
TOWN / LINK MEDIAN SALE

**\$464,950**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES







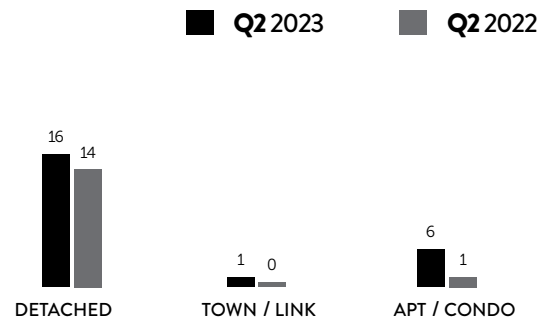
# MIDTOWN KITCHENER

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$599,900	23	31	0.74	\$705,000
<b>Q2 2022</b>   TOTAL	\$649,000	15	29	0.52	\$750,000
% CHANGE (+/-)	76% ▼	53.3% ▲	6.9% ▲	43.4% ▲	6.0% ▼
<b>Q1 2023</b>   TOTAL	\$589,950	4	8	0.50	\$648,000
% CHANGE (+/-)	1.7% ▲	475.0% ▲	287.5% ▲	48.4% ▲	8.8% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	16	20	▼
TOWN / LINK HOMES	2	0	▲
APARTMENT / CONDO	13	9	▲
TOTAL	31	29	▲
SALES TO NEW RATIO	0.74	0.52	▲

## Q2 SALES BY INVENTORY TYPE

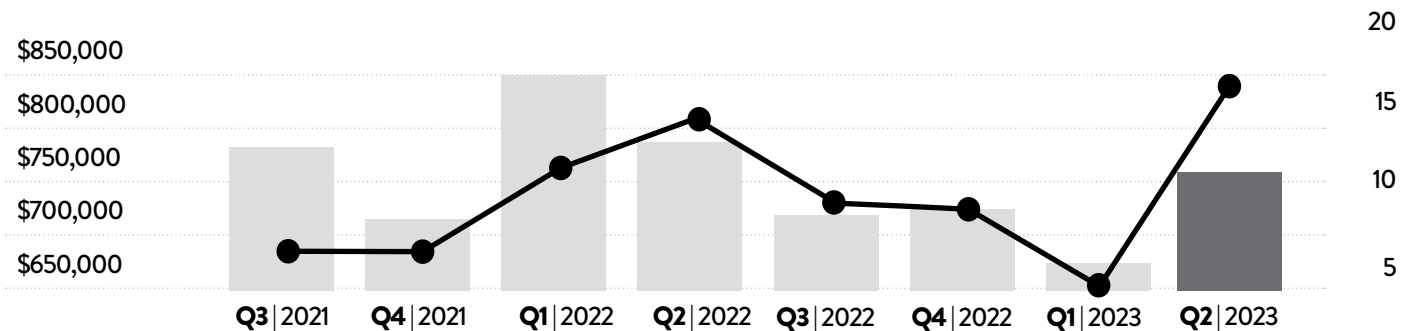


**\$735,500**  
DETACHED MEDIAN SALE

**\$875,000**  
TOWN / LINK MEDIAN SALE

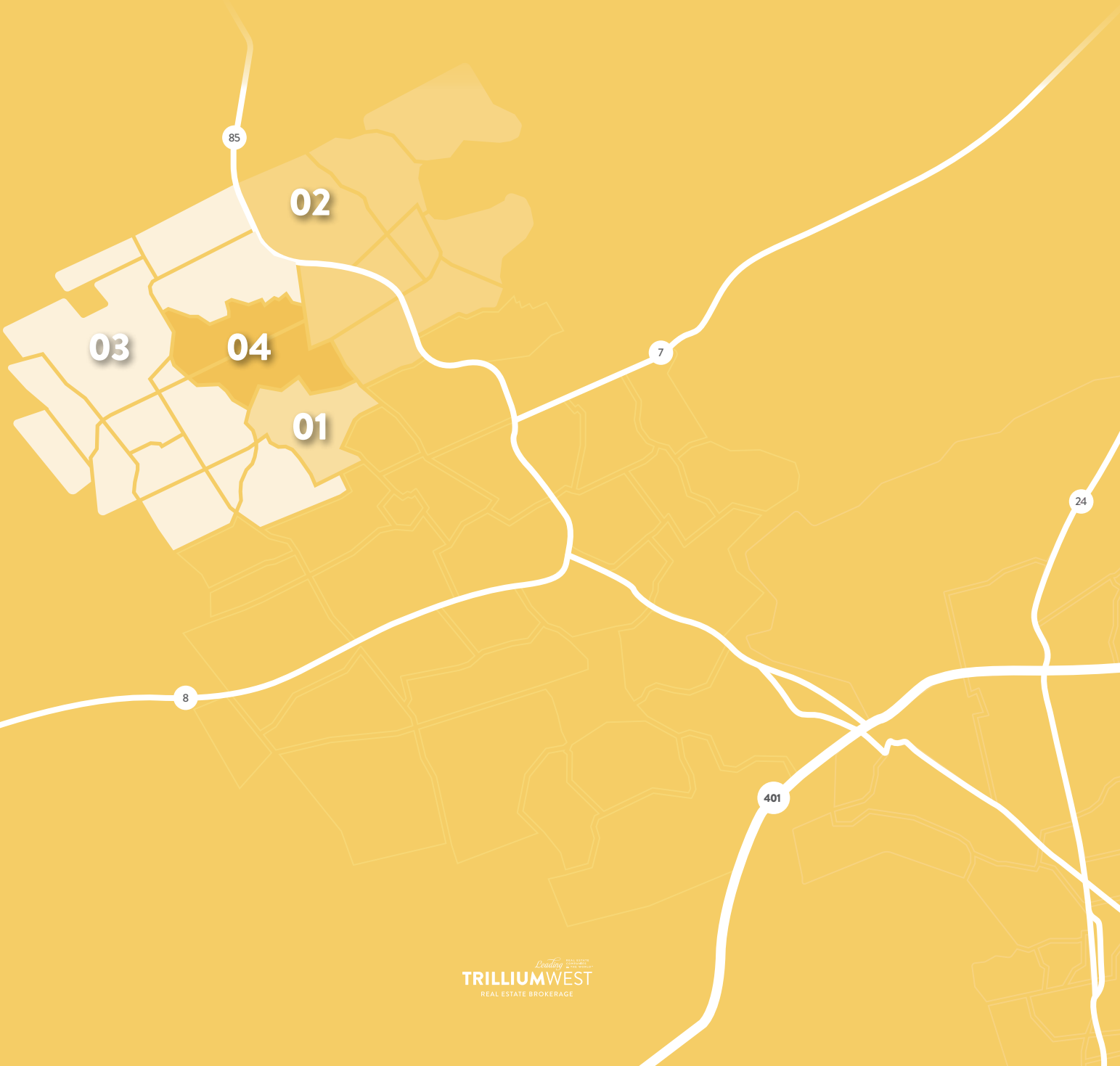
**\$478,495**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



# WATERLOO OVERVIEW

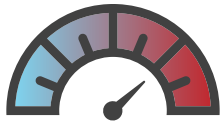
UPTOWN WATERLOO	01
EAST WATERLOO	02
WEST WATERLOO	03
UNIVERSITY DISTRICT	04



## COMPLETE DATA WATERLOO

### Q2 | SALES TO NEW LISTING RATIO

BETWEEN 0.4 AND 0.6 IS  
CONSIDERED A BALANCED MARKET



0.77

	Q2   2023	% Chg (Y)	Q2   2022	% Chg (Q)	Q1   2023
MEDIAN DET. SALE PRICE	\$910,000	4.7% ▼	\$955,000	8.2% ▲	\$841,000
NUMBER OF NEW SALES	558	1.9% ▼	569	74.9% ▲	319
MEDIAN DAYS ON MARKET	8	=	8	2 days	10
NEW INVENTORY	729	23.1% ▼	948	51.2% ▲	482

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

## UP & DOWN QUICK REVIEW

▲8.2%

Bump Q/Q Waterloo wide detached.  
Back up over the 900k mark.

▼25%

Decline in Y/Y inventory for University District.  
Sales are up 8% during the same time, no wonder  
things are heating up.

▲6%

Increase Q/Q in uptown condo median price.  
Largely driven by the 2 bed market.

▼30%

Price gap between West Waterloo detached  
and townhomes. We think West Waterloo  
townhomes are going to be hot over the  
next quarter.

▲12%

Huge increase in Q/Q West Waterloo detached.  
Back up over the \$1M mark.

▼20%

Decrease in Y/Y Uptown condo inventory.  
Sales followed suit.

▲44%

Surge in Y/Y University District list to sales ratio.  
The student market is heating up.

▼0%

Chance of Waterloo bringing anything other than  
new condo buildings to market as they are pretty  
much land locked at this point.

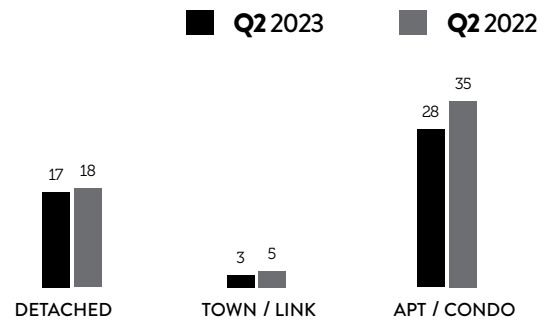
# UPTOWN WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$652,500	48	82	0.59	\$655,000
<b>Q2 2022</b>   TOTAL	\$649,450	58	109	0.53	\$708,750
% CHANGE (+/-)	0.5% ▲	172% ▼	24.8% ▼	10.0% ▲	76% ▼
<b>Q1 2023</b>   TOTAL	\$725,000	47	58	0.81	\$775,000
% CHANGE (+/-)	100% ▼	2.1% ▲	41.4% ▲	27.8% ▼	15.5% ▼

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	29	42	▼
TOWN / LINK HOMES	10	13	▼
APARTMENT / CONDO	43	54	▼
TOTAL	82	109	▼
SALES TO NEW RATIO	0.59	0.53	▲

## Q2 SALES BY INVENTORY TYPE

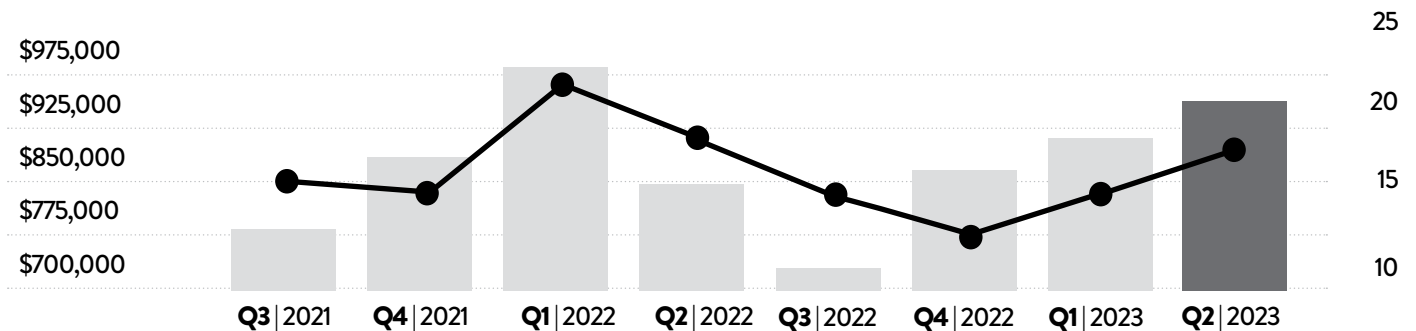


**\$925,000**  
DETACHED MEDIAN SALE

**\$550,000**  
TOWN / LINK MEDIAN SALE

**\$577,500**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



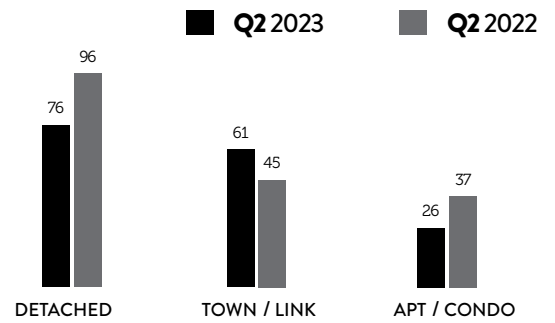
# EAST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$699,900	163	194	0.84	\$799,900
<b>Q2 2022</b>   TOTAL	\$749,900	178	254	0.70	\$827,000
% CHANGE (+/-)	6.7% ▼	8.4% ▼	23.6% ▼	19.9% ▲	3.3% ▼
<b>Q1 2023</b>   TOTAL	\$675,000	77	117	0.66	\$741,000
% CHANGE (+/-)	3.7% ▲	111.7% ▲	65.8% ▲	27.7% ▲	8.0% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	100	130	▼
TOWN / LINK HOMES	61	69	▼
APARTMENT / CONDO	33	55	▼
TOTAL	194	254	▼
SALES TO NEW RATIO	0.84	0.70	▲

## Q2 SALES BY INVENTORY TYPE

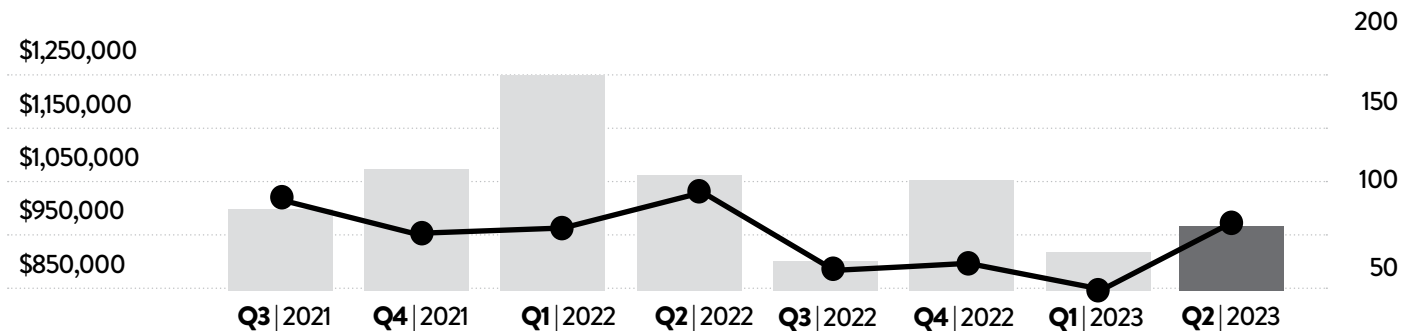


**\$917,500**  
DETACHED MEDIAN SALE

**\$645,100**  
TOWN / LINK MEDIAN SALE

**\$461,450**  
APT / CONDO MEDIAN SALE

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



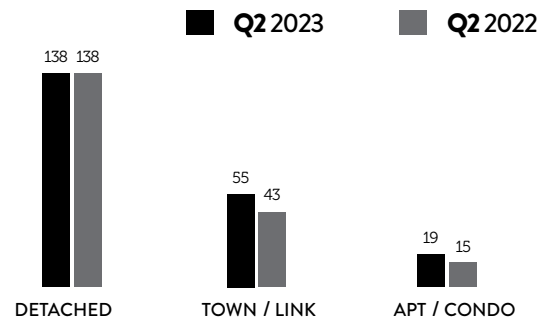
# WEST WATERLOO

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$782,000	212	261	0.81	\$867,500
<b>Q2 2022</b>   TOTAL	\$799,499	196	311	0.63	\$882,500
% CHANGE (+/-)	2.2% ▼	8.2% ▲	16.1% ▼	28.9% ▲	1.7% ▼
<b>Q1 2023</b>   TOTAL	\$750,000	131	169	0.78	\$800,000
% CHANGE (+/-)	4.3% ▲	61.8% ▲	54.4% ▲	4.8% ▲	8.4% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	174	208	▼
TOWN / LINK HOMES	71	78	▼
APARTMENT / CONDO	16	25	▼
TOTAL	261	311	▼
SALES TO NEW RATIO	0.81	0.63	▲

## Q2 SALES BY INVENTORY TYPE

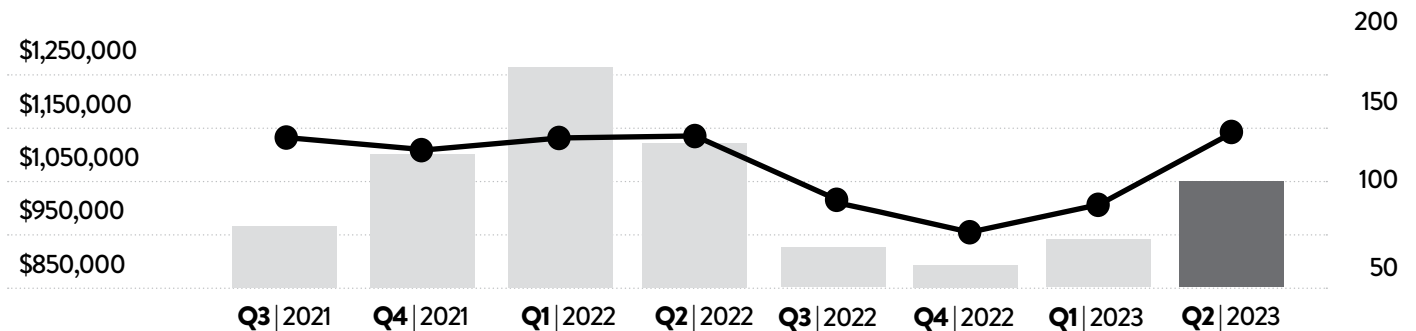


**\$1,002,000**  
DETACHED MEDIAN SALE

**\$680,000**  
TOWN / LINK MEDIAN SALE

**\$475,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES





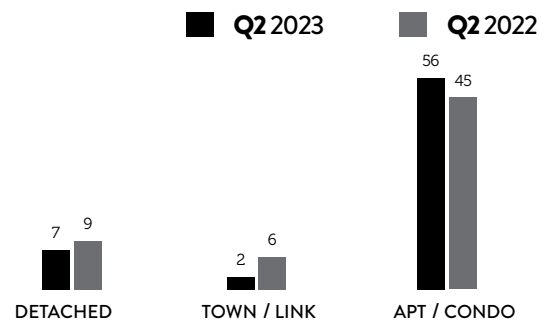
# UNIVERSITY DISTRICT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$499,900	65	96	0.68	\$482,500
<b>Q2 2022</b>   TOTAL	\$509,500	60	128	0.47	\$520,000
% CHANGE (+/-)	1.9% ▼	8.3% ▲	25.0% ▼	44.4% ▲	7.2% ▼
<b>Q1 2023</b>   TOTAL	\$479,900	28	66	0.42	\$473,000
% CHANGE (+/-)	4.2% ▲	132.1% ▲	45.5% ▲	59.6% ▲	2.0% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
DETACHED HOMES	12	21	▼
TOWN / LINK HOMES	3	9	▼
APARTMENT / CONDO	81	98	▼
TOTAL	96	128	▼
SALES TO NEW RATIO	0.68	0.47	▲

## Q2 SALES BY INVENTORY TYPE

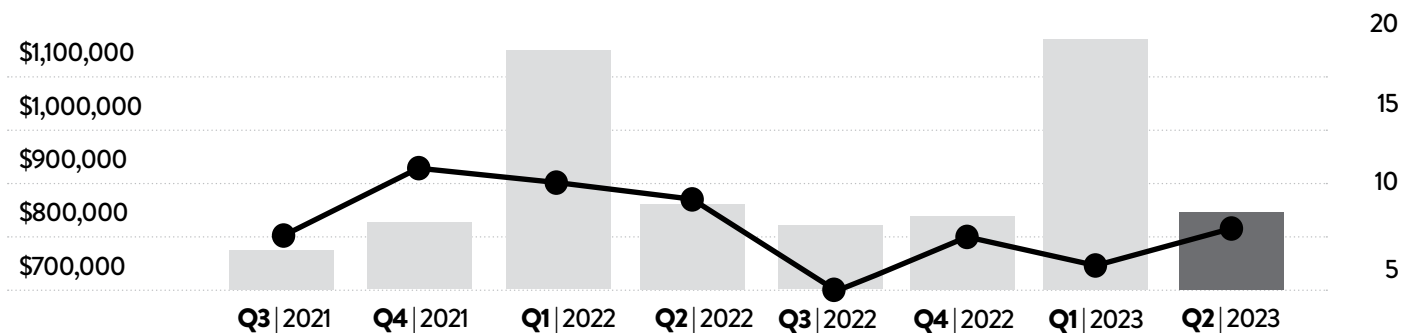


**\$800,000**  
DETACHED MEDIAN SALE

**\$502,500**  
TOWN / LINK MEDIAN SALE

**\$470,000**  
APT / CONDO MEDIAN SALE

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



# TOWNSHIPS OVERVIEW

CENTRE WELLINGTON	01
GUELPH ERAMOSA	02
NORTH DUMFRIES	03
TOWNSHIP OF PUSLINCH	04
TOWNSHIP OF WELLESLEY	05
TOWNSHIP OF WILMOT	06
TOWNSHIP OF WOOLWICH	07

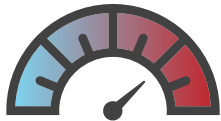




## COMPLETE DATA TOWNSHIPS

### Q2 | SALES TO NEW LISTING RATIO

BETWEEN 0.4 AND 0.6 IS  
CONSIDERED A BALANCED MARKET



0.77

	Q2   2023	% Chg (Y)	Q2   2022	% Chg (Q)	Q1   2023
MEDIAN DET. SALE PRICE	\$940,000	8.3% ▼	\$1,025,000	4.5% ▲	\$899,450
NUMBER OF NEW SALES	487	3.9% ▼	507	61.3% ▲	302
MEDIAN DAYS ON MARKET	19	11 days ▲	8	2 days ▼	21
NEW INVENTORY	636	26.3% ▼	863	21.1% ▲	525

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

## UP & DOWN QUICK REVIEW

▲18.62% Increase in Y/Y sales in Centre Wellington. The Covid rural migration isn't over yet.

▼26% Decline in Y/Y Inventory across all the townships.

▲33% Surge in Y/Y sales in Guelph Eramosa. See above.

▼6.86% Fall in Q/Q median sales price for Puslinch. The high end market feeling the interest rate increases.

▲26% Jump in Y/Y list to sale ratio for Woolwich. Demand is outpacing supply.

▼11% Decrease in median list price for Centre Wellington. The underprice strategy returns to Fergus and Elora.

▲61% Huge Q/Q increase in township wide sales. Inventory only came up 21% during the same time period. Watch for a seller market in Q3.

▼0% Chance of the townships slowing down in Q3.

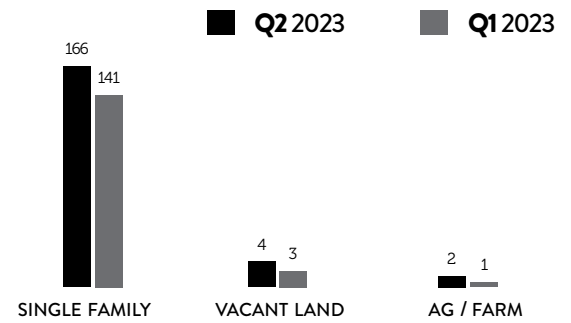
# TOWNSHIP OF CENTRE WELLINGTON

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$799,950	172	224	0.77	\$806,500
<b>Q2 2022</b>   TOTAL	\$899,900	145	232	0.63	\$965,000
% CHANGE (+/-)	11.1% ▼	18.6% ▲	3.5% ▼	22.9% ▲	16.4% ▼
<b>Q1 2022</b>   TOTAL	\$752,500	98	159	0.62	\$747,500
% CHANGE (+/-)	6.3% ▲	75.5% ▲	40.9% ▲	24.6% ▲	7.9% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	214	224	▼
VACANT LAND	8	5	▲
AG / FARM	2	3	▼
TOTAL	224	232	▼
SALES TO NEW RATIO	0.77	0.63	▲

## Q2 SALES BY INVENTORY TYPE

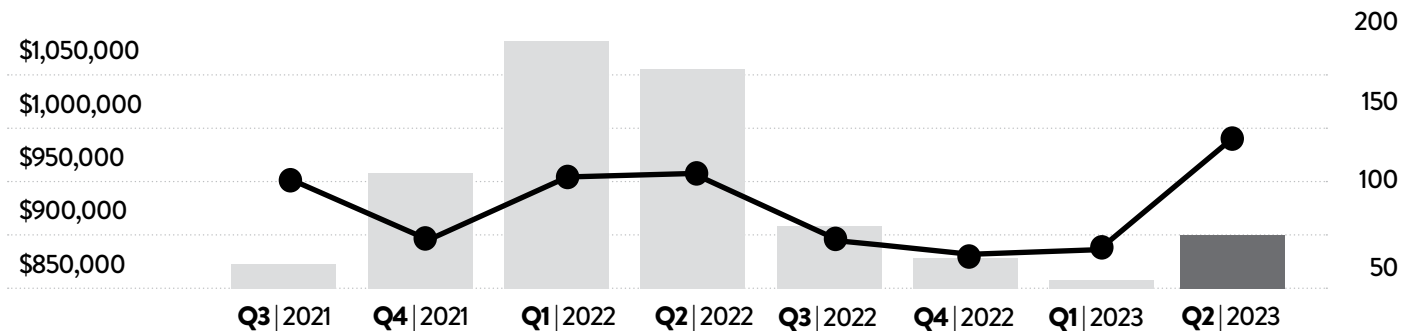


**\$742,500**  
SINGLE FAMILY MEDIAN

**N/A**  
VACANT LAND MEDIAN

**\$1,900,000**  
AG / FARM MEDIAN

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



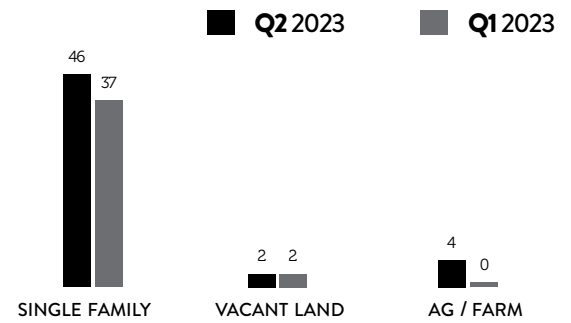
# TOWNSHIP OF GUELPH ERAMOSIA

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$1,079,000	52	77	0.68	\$1,035,500
<b>Q2 2022</b>   TOTAL	\$1,099,000	39	77	0.51	\$1,107,000
% CHANGE (+/-)	18% ▼	33.3% ▲	=	33.3% ▲	6.5% ▼
<b>Q1 2022</b>   TOTAL	\$1,175,000	31	46	0.67	\$1,100,000
% CHANGE (+/-)	8.2% ▼	67.7% ▲	67.4% ▲	0.2% ▲	5.9% ▼

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	72	69	▲
VACANT LAND	3	3	=
AG / FARM	2	5	▼
TOTAL	77	77	=
SALES TO NEW RATIO	0.68	0.51	▲

## Q2 SALES BY INVENTORY TYPE



**\$1,030,000**

SINGLE FAMILY MEDIAN

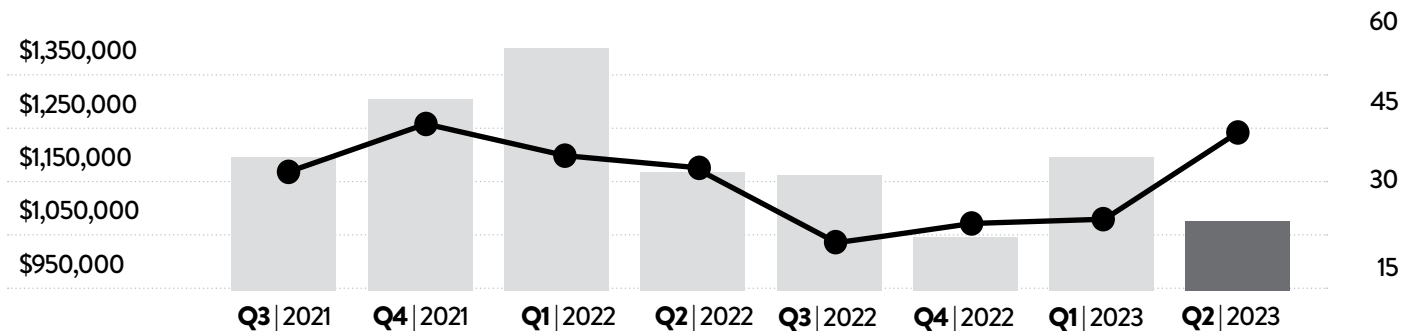
**\$1,027,500**

VACANT LAND MEDIAN

**\$2,525,000**

AG / FARM MEDIAN

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



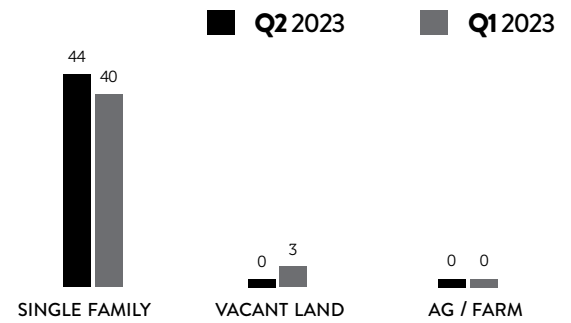
# TOWNSHIP OF NORTH DUMFRIES

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$799,950	44	75	0.59	\$921,750
<b>Q2 2022</b>   TOTAL	\$864,500	43	66	0.65	\$960,000
% CHANGE (+/-)	75% ▼	2.3% ▲	13.6% ▲	9.9% ▼	4.0% ▼
<b>Q1 2022</b>   TOTAL	\$866,950	21	39	0.54	\$908,500
% CHANGE (+/-)	77% ▼	109.5% ▲	92.3% ▲	8.9% ▲	15% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	69	62	▲
VACANT LAND	5	4	▲
AG / FARM	1	0	▲
TOTAL	75	66	▲
SALES TO NEW RATIO	0.59	0.65	▼

## Q2 SALES BY INVENTORY TYPE

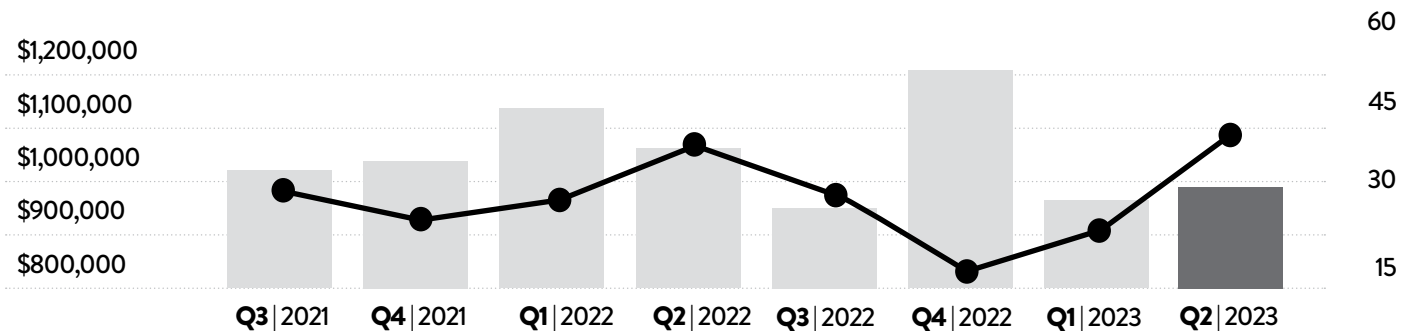


**\$921,750**  
SINGLE FAMILY MEDIAN

**N/A**  
VACANT LAND MEDIAN

**N/A**  
AG / FARM MEDIAN

MEDIAN DET. SALE PRICE — # OF MEDIAN DET. SALES



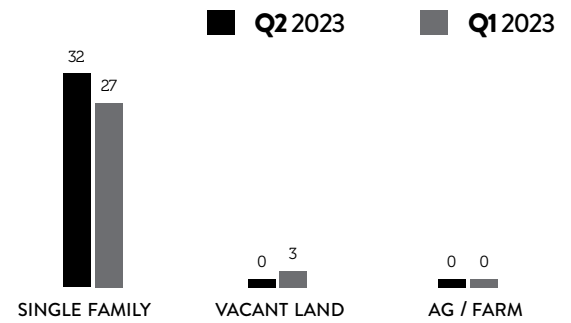
# TOWNSHIP OF PUSLINCH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$779,000	32	69	0.46	\$815,000
<b>Q2 2022</b>   TOTAL	\$1,399,900	30	72	0.42	\$1,360,000
% CHANGE (+/-)	44.3% ▼	6.7% ▲	4.2% ▼	11.3% ▲	40.1% ▼
<b>Q1 2022</b>   TOTAL	\$899,900	18	35	0.51	\$875,000
% CHANGE (+/-)	13.4% ▼	77.8% ▲	97.1% ▲	9.8% ▼	6.9% ▼

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	63	62	▲
VACANT LAND	4	9	▼
AG / FARM	21	1	▲
TOTAL	69	72	▼
SALES TO NEW RATIO	0.46	0.42	▲

## Q2 SALES BY INVENTORY TYPE

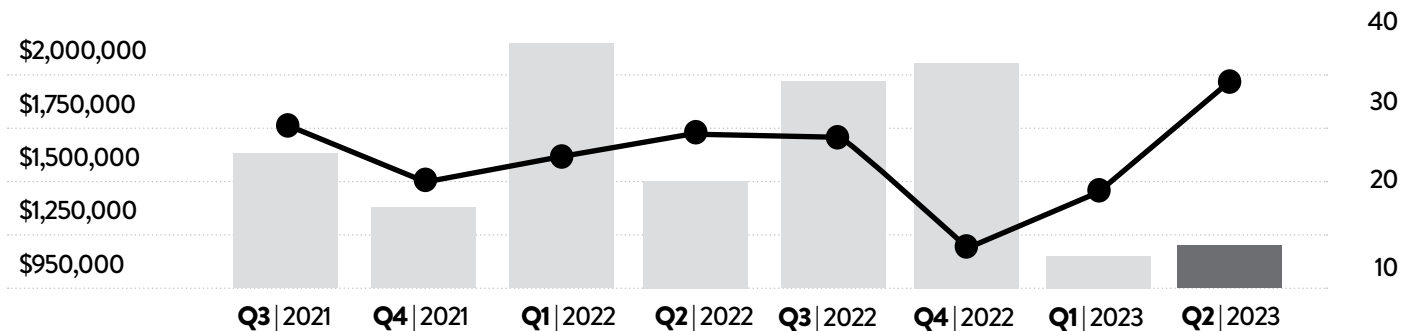


**\$1,043,500**  
SINGLE FAMILY MEDIAN

**N/A**  
VACANT LAND MEDIAN

**N/A**  
AG / FARM MEDIAN

## MEDIAN DET. SALE PRICE & # OF MEDIAN DET. SALES



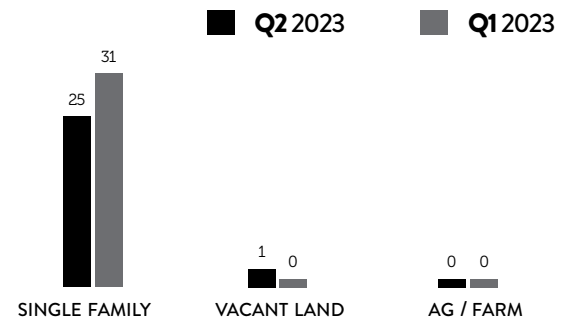
# TOWNSHIP OF WELLESLEY

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$792,000	26	33	0.79	\$852,050
<b>Q2 2022</b>   TOTAL	\$1,025,000	31	43	0.72	\$1,115,000
% CHANGE (+/-)	22.7% ▼	16.1% ▼	23.3% ▼	9.3% ▲	23.6% ▼
<b>Q1 2022</b>   TOTAL	\$899,900	16	26	0.62	\$896,000
% CHANGE (+/-)	12.0% ▼	62.5% ▲	26.9% ▲	28.0% ▲	4.9% ▼

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	32	43	▼
VACANT LAND	1	0	▲
AG / FARM	0	0	=
TOTAL	22	43	▼
SALES TO NEW RATIO	0.79	0.72	▲

## Q2 SALES BY INVENTORY TYPE

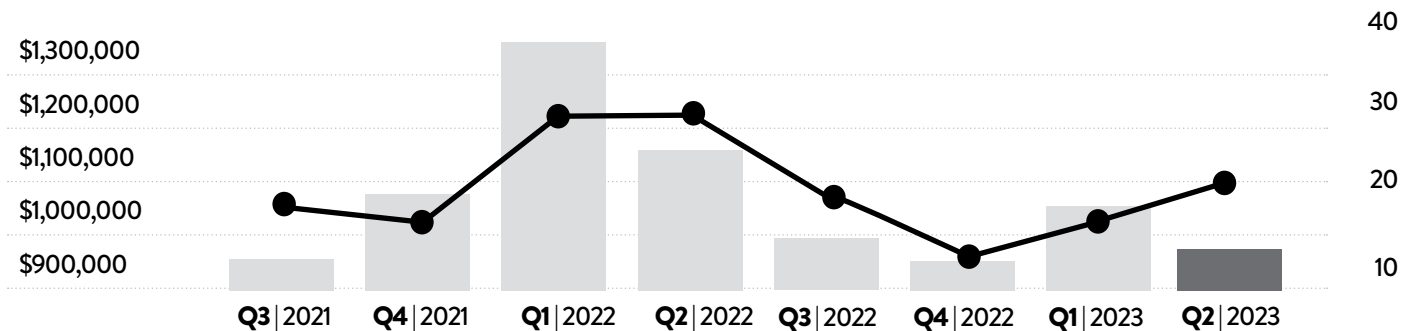


**\$860,000**  
SINGLE FAMILY MEDIAN

**\$360,000**  
VACANT LAND MEDIAN

**N/A**  
AG / FARM MEDIAN

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



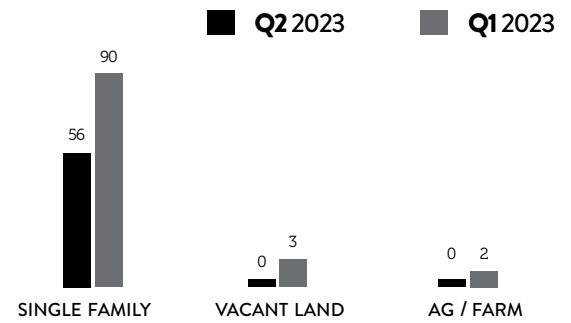
# TOWNSHIP OF WILMOT

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$799,900	56	73	0.77	\$851,000
<b>Q2 2022</b>   TOTAL	\$799,900	95	147	0.65	\$856,800
% CHANGE (+/-)	=	41.0% ▼	50.3% ▼	18.7% ▲	0.7% ▼
<b>Q1 2022</b>   TOTAL	\$764,500	54	74	0.73	\$755,000
% CHANGE (+/-)	4.6% ▲	3.7% ▲	1.3% ▼	5.1% ▲	12.7% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	73	138	▼
VACANT LAND	0	5	▼
AG / FARM	0	4	▼
TOTAL	73	147	▼
SALES TO NEW RATIO	0.77	0.65	▲

## Q2 SALES BY INVENTORY TYPE

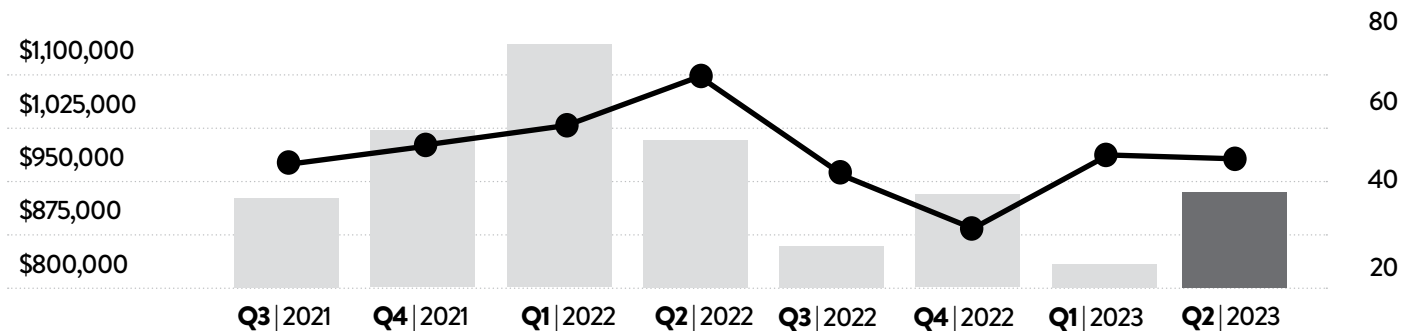


**\$851,000**  
SINGLE FAMILY MEDIAN

**N/A**  
VACANT LAND MEDIAN

**N/A**  
AG / FARM MEDIAN

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES



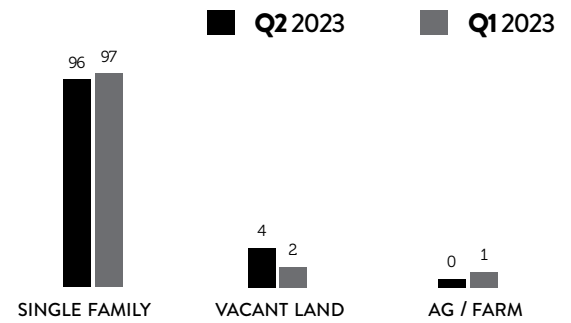
# TOWNSHIP OF WOOLWICH

	MEDIAN LIST PRICE	NUMBER OF SALES	NEW INVENTORY	SALES / NEW RATIO	MEDIAN SALE PRICE
<b>Q2 2023</b>   TOTAL	\$850,000	100	123	0.81	\$875,000
<b>Q2 2022</b>   TOTAL	\$879,900	100	155	0.65	\$982,000
% CHANGE (+/-)	34% ▼	=	20.6% ▼	26.0% ▲	10.9% ▼
<b>Q1 2022</b>   TOTAL	\$897,000	51	84	0.61	\$870,000
% CHANGE (+/-)	5.2% ▼	96.1% ▲	46.4% ▲	33.9% ▲	0.6% ▲

## Q2 NEW INVENTORY

	Q2 2023	Q2 2022	TREND
SINGLE FAMILY	122	150	▼
VACANT LAND	0	4	▼
AG / FARM	1	1	=
TOTAL	123	155	▼
SALES TO NEW RATIO	0.81	0.65	▲

## Q2 SALES BY INVENTORY TYPE

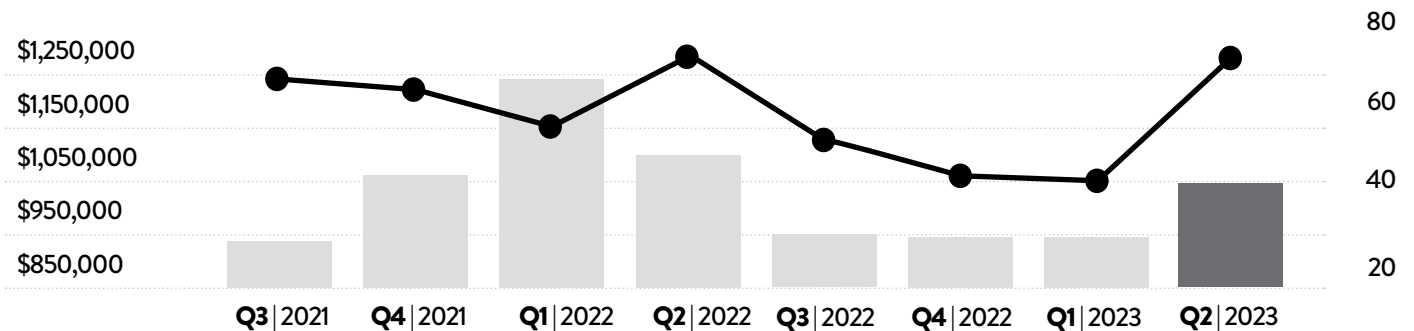


**\$863,500**  
SINGLE FAMILY MEDIAN

**\$2,087,500**  
VACANT LAND MEDIAN

**N/A**  
AG / FARM MEDIAN

## MEDIAN DET. SALE PRICE # OF MEDIAN DET. SALES





## 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.



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Any specific data requests can be sent to [data@trilliumwest.com](mailto:data@trilliumwest.com) and we would be happy to help. Hit us up.

The Data Team at TW