

# Monthly Indicators

## March 2026

U.S. existing-home sales unexpectedly rose 1.7% month-over-month to a seasonally adjusted annual rate of 4.09 million, as lower mortgage rates helped boost buyer activity, according to the National Association of REALTORS® (NAR). Monthly sales increased in the Midwest, South, and West but decreased in the Northeast. Sales increased year-over-year in the South, but fell in the Northeast, Midwest, and West.

Closed Sales increased 12.8 percent for Detached homes but decreased 2.4 percent for Attached homes. Pending Sales increased 1.9 percent for Detached homes but decreased 9.9 percent for Attached homes.

The Median Sales Price was up 0.4 percent to \$1,167,000 for Detached homes and 9.7 percent to \$790,000 for Attached homes. Days on Market increased 22.2 percent for Detached homes but decreased 13.5 percent for Attached homes. Supply decreased 26.5 percent for Detached homes and 29.7 percent for Attached homes.

Data from NAR show that inventory continued to grow nationwide, ticking up 2.4% month-over-month and 4.9% year-over-year to 1.29 million units heading into March, representing a 3.8-month supply at the current sales pace. Meanwhile, home prices increased for the 32nd consecutive month, climbing 0.3% year-over-year to \$398,000.

## Monthly Snapshot

**\$1,167,000**    **\$790,000**    **\$1,010,000**

Median Sales Price  
Detached Homes

Median Sales Price  
Attached Homes

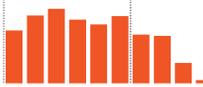
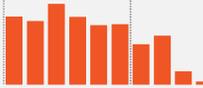
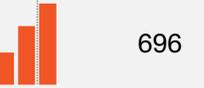
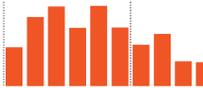
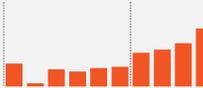
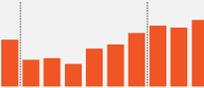
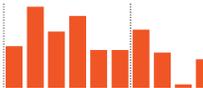
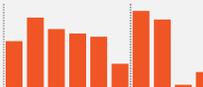
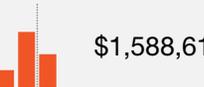
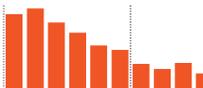
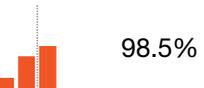
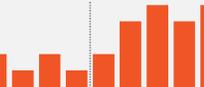
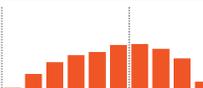
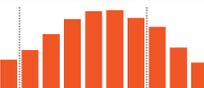
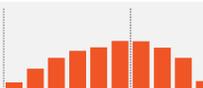
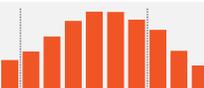
Median Sales Price  
All Properties Combined

A research tool provided by the North San Diego County REALTORS® for residential real estate activity in North San Diego County. Percent changes are calculated using rounded figures.

Single-Family Detached Activity Overview	2
Single-Family Attached Activity Overview	3
New Listings	4
Pending Sales	5
Closed Sales	6
Days on Market Until Sale	7
Median Sales Price	8
Average Sales Price	9
Percent of Original List Price Received	10
Housing Affordability Index	11
Inventory of Homes for Sale	12
Months Supply of Inventory	13
All Properties Combined	14

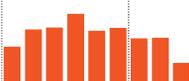
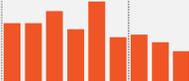
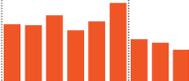
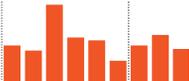
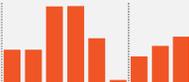
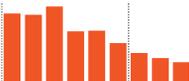
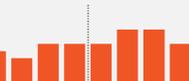
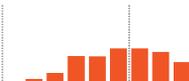
# Single-Family Detached Activity Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Detached homes only.**

Key Metrics	Historical Sparkbars			3-2025	3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	03-2024	03-2025	03-2026						
<b>New Listings</b>				1,085	<b>1,024</b>	- 5.6%	2,930	<b>2,790</b>	- 4.8%
<b>Pending Sales</b>				696	<b>709</b>	+ 1.9%	1,768	<b>1,868</b>	+ 5.7%
<b>Closed Sales</b>				563	<b>635</b>	+ 12.8%	1,495	<b>1,581</b>	+ 5.8%
<b>Days on Market</b>				27	<b>33</b>	+ 22.2%	35	<b>38</b>	+ 8.6%
<b>Median Sales Price</b>				\$1,162,000	<b>\$1,167,000</b>	+ 0.4%	\$1,150,000	<b>\$1,150,000</b>	0.0%
<b>Average Sales Price</b>				\$1,588,619	<b>\$1,504,412</b>	- 5.3%	\$1,557,008	<b>\$1,512,610</b>	- 2.9%
<b>Pct. of Orig. Price Received</b>				98.5%	<b>98.4%</b>	- 0.1%	97.7%	<b>97.6%</b>	- 0.1%
<b>Housing Affordability Index</b>				24	<b>24</b>	0.0%	24	<b>25</b>	+ 4.2%
<b>Inventory of Homes for Sale</b>				2,020	<b>1,537</b>	- 23.9%	--	<b>--</b>	--
<b>Months Supply of Inventory</b>				3.4	<b>2.5</b>	- 26.5%	--	<b>--</b>	--

# Single-Family Attached Activity Overview

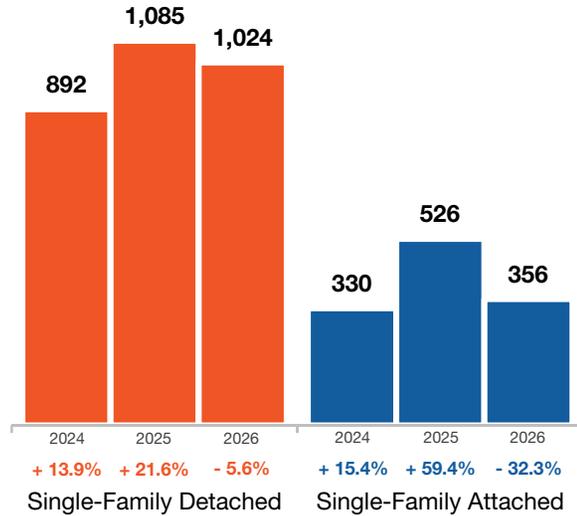
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Attached homes only.**

Key Metrics	Historical Sparkbars			3-2025	3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	03-2024	03-2025	03-2026						
New Listings				526	<b>356</b>	- 32.3%	1,360	<b>1,082</b>	- 20.4%
Pending Sales				273	<b>246</b>	- 9.9%	754	<b>699</b>	- 7.3%
Closed Sales				251	<b>245</b>	- 2.4%	674	<b>604</b>	- 10.4%
Days on Market				37	<b>32</b>	- 13.5%	37	<b>37</b>	0.0%
Median Sales Price				\$720,000	<b>\$790,000</b>	+ 9.7%	\$730,000	<b>\$753,500</b>	+ 3.2%
Average Sales Price				\$870,455	<b>\$929,691</b>	+ 6.8%	\$840,861	<b>\$872,326</b>	+ 3.7%
Pct. of Orig. Price Received				98.5%	<b>98.0%</b>	- 0.5%	98.2%	<b>97.6%</b>	- 0.6%
Housing Affordability Index				38	<b>36</b>	- 5.3%	38	<b>37</b>	- 2.6%
Inventory of Homes for Sale				936	<b>636</b>	- 32.1%	--	<b>--</b>	--
Months Supply of Inventory				3.7	<b>2.6</b>	- 29.7%	--	<b>--</b>	--

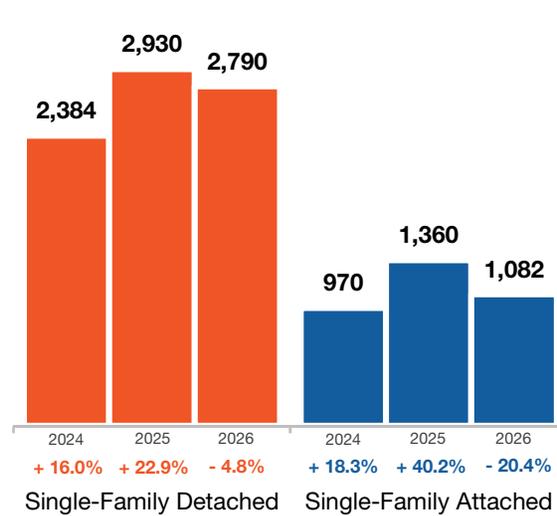
# New Listings

A count of the properties that have been newly listed on the market in a given month.

## March

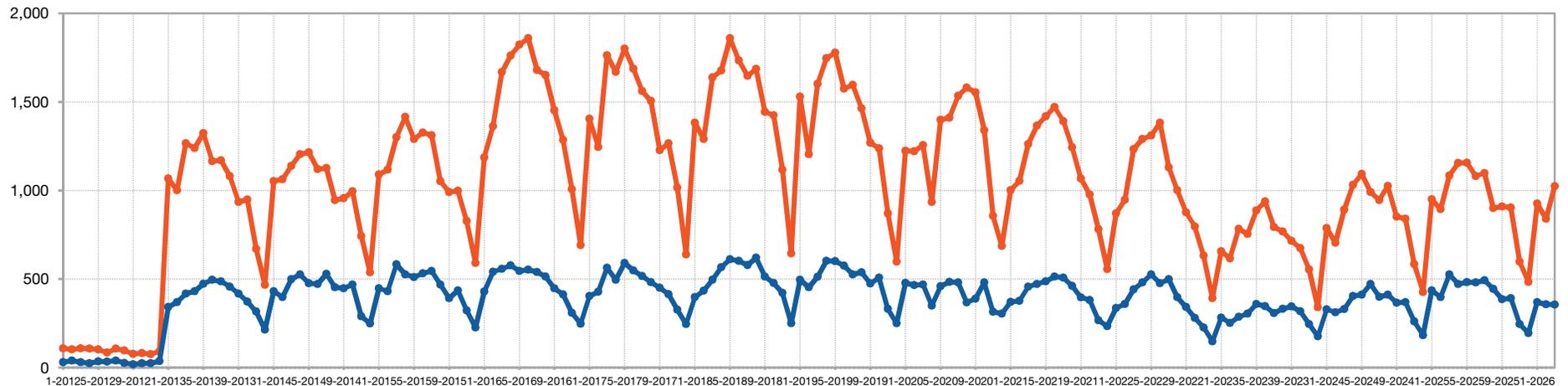


## Year to Date



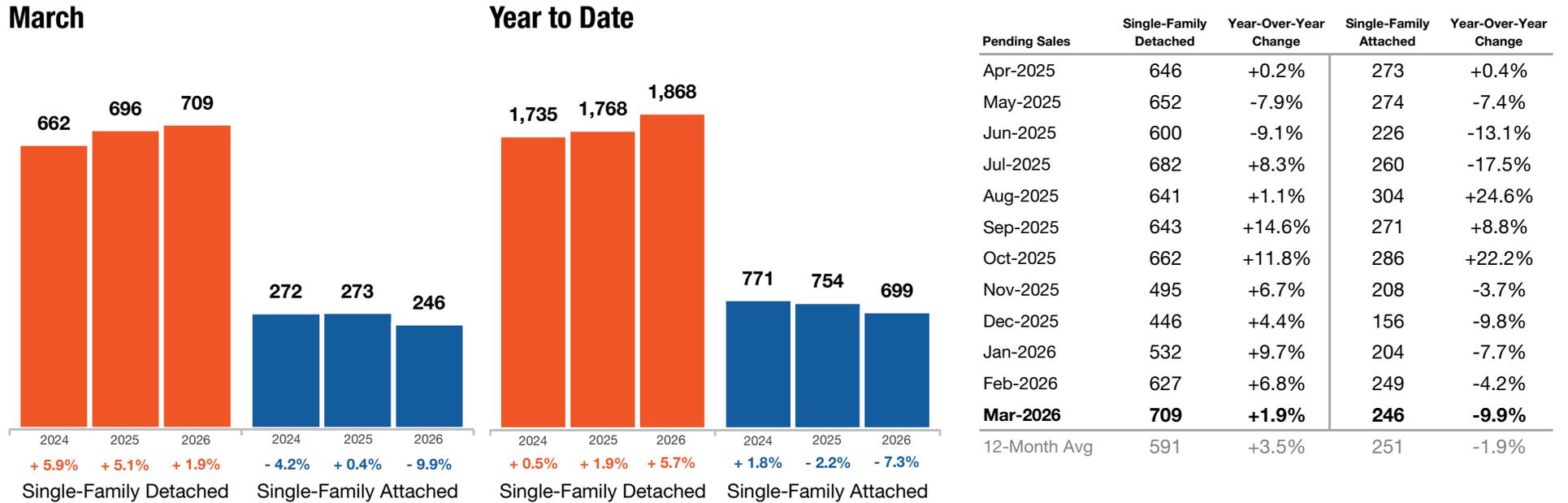
New Listings	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	1,155	+12.0%	471	+16.6%
May-2025	1,157	+5.8%	482	+17.0%
Jun-2025	1,082	+9.2%	480	+1.9%
Jul-2025	1,098	+16.1%	493	+23.6%
Aug-2025	900	-12.2%	444	+8.0%
Sep-2025	909	+6.7%	386	+5.5%
Oct-2025	904	+7.6%	392	+6.2%
Nov-2025	598	+2.2%	246	-5.4%
Dec-2025	484	+13.6%	195	+7.1%
Jan-2026	926	-2.5%	369	-15.4%
Feb-2026	840	-6.1%	357	-10.3%
<b>Mar-2026</b>	<b>1,024</b>	<b>-5.6%</b>	<b>356</b>	<b>-32.3%</b>
12-Month Avg	923	+3.3%	389	+0.8%

## Historical New Listings by Month

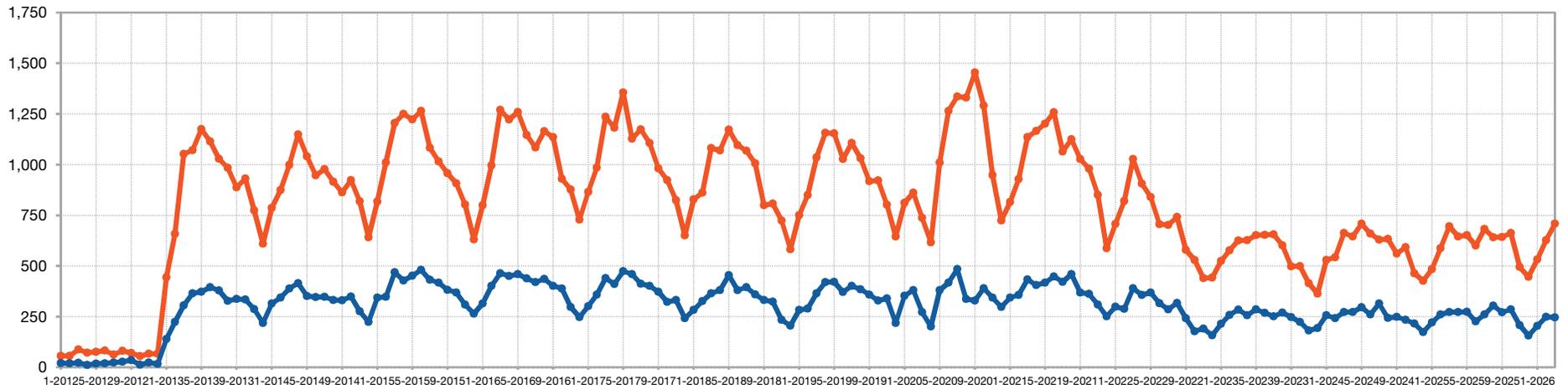


# Pending Sales

A count of the properties on which offers have been accepted in a given month.



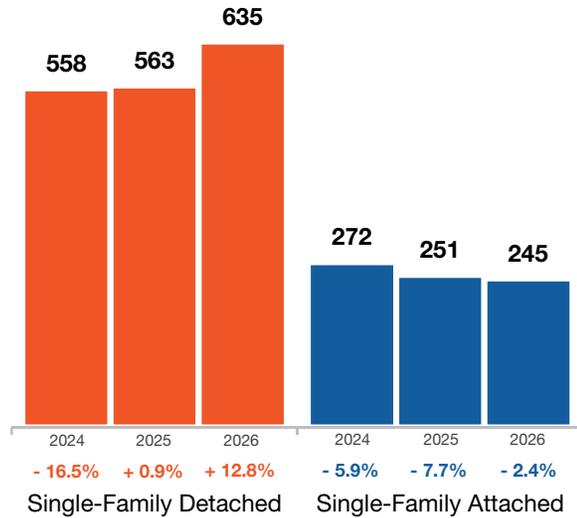
## Historical Pending Sales by Month



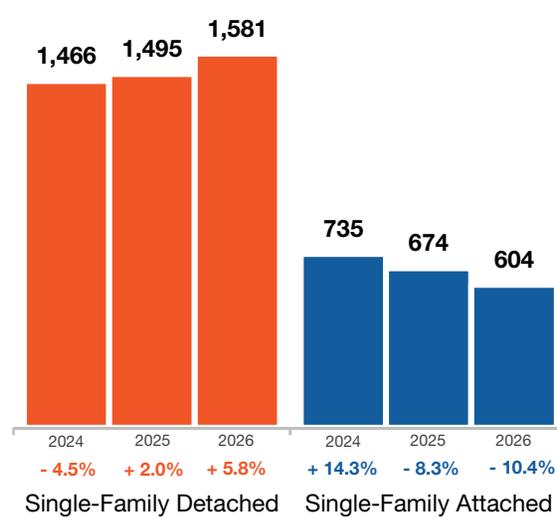
# Closed Sales

A count of the actual sales that closed in a given month.

## March

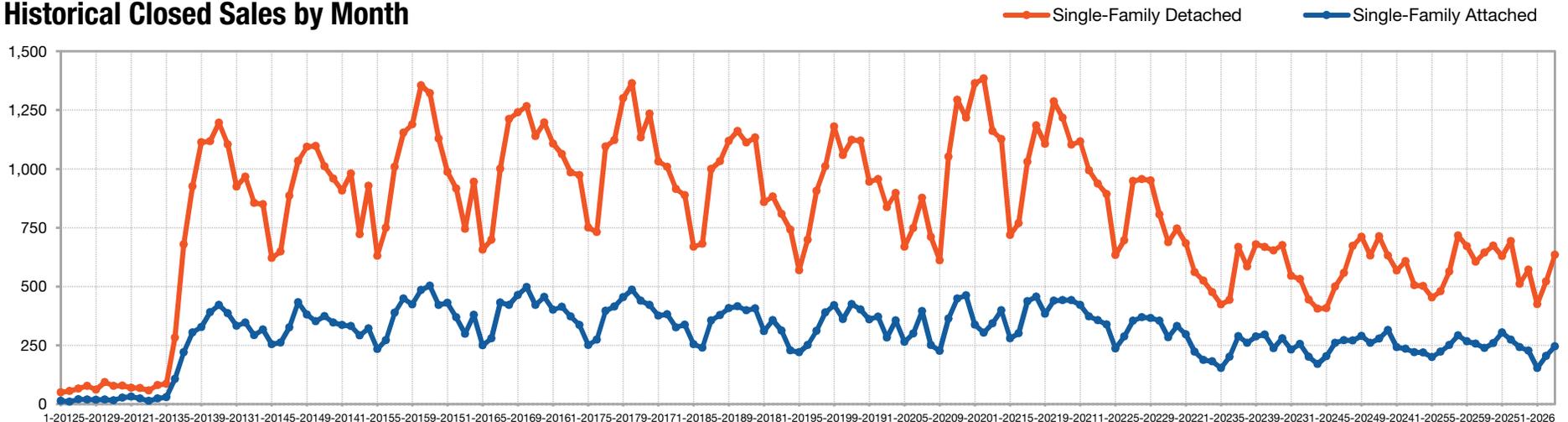


## Year to Date



Closed Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	717	+6.7%	292	+8.1%
May-2025	671	-5.6%	267	-7.9%
Jun-2025	605	-4.1%	257	-1.2%
Jul-2025	644	-9.7%	239	-14.0%
Aug-2025	673	+6.5%	259	-17.8%
Sep-2025	629	+10.7%	305	+26.0%
Oct-2025	693	+14.0%	274	+16.6%
Nov-2025	511	+1.0%	242	+9.5%
Dec-2025	571	+13.7%	227	+3.7%
Jan-2026	425	-6.2%	154	-23.0%
Feb-2026	521	+8.8%	205	-8.1%
<b>Mar-2026</b>	<b>635</b>	<b>+12.8%</b>	<b>245</b>	<b>-2.4%</b>
12-Month Avg	587	+3.7%	250	-1.3%

## Historical Closed Sales by Month

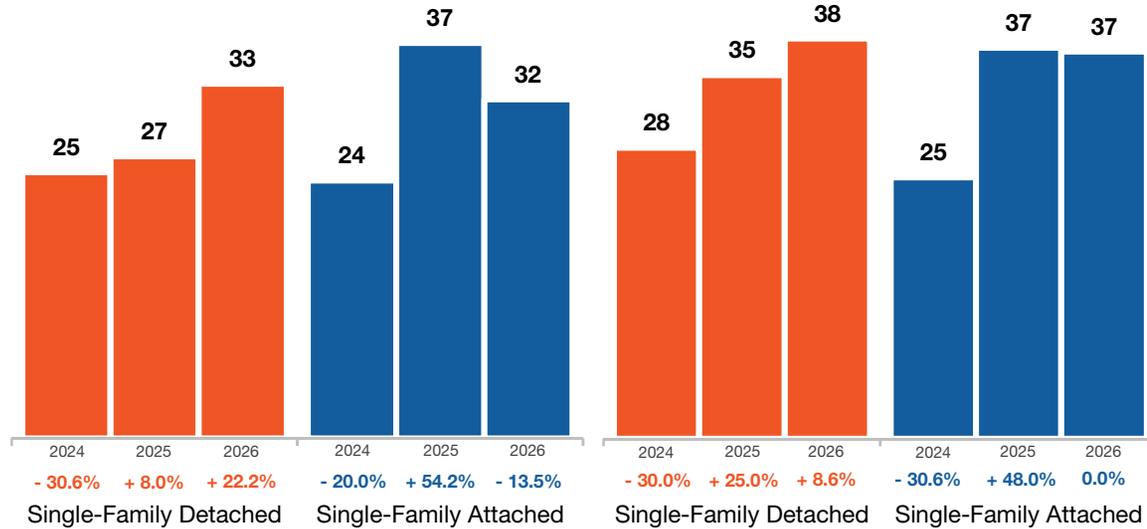


# Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given month.

## March

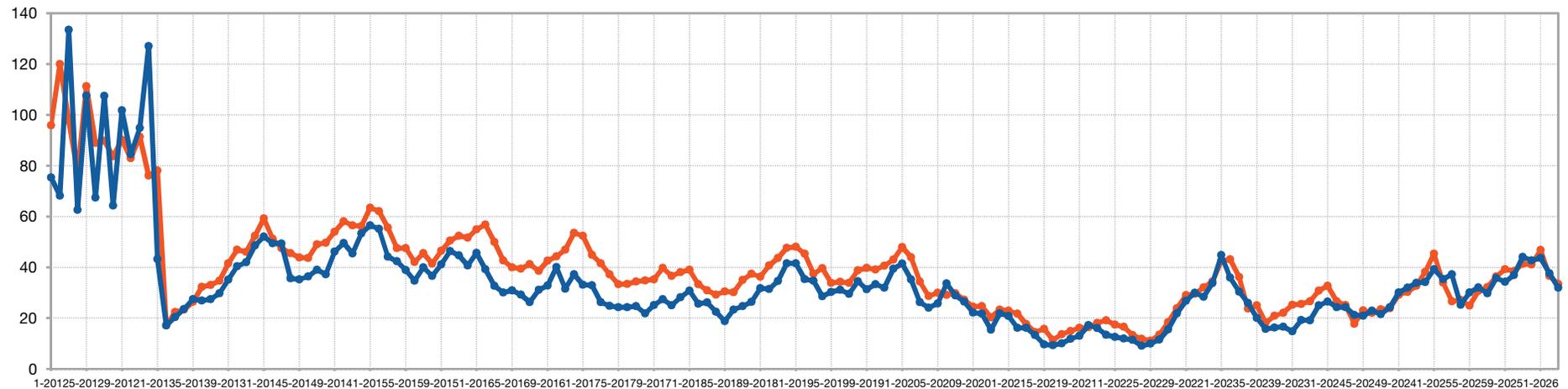
## Year to Date



Days on Market	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	27	+50.0%	25	+19.0%
May-2025	25	+8.7%	30	+42.9%
Jun-2025	31	+40.9%	32	+39.1%
Jul-2025	32	+39.1%	30	+36.4%
Aug-2025	36	+50.0%	36	+50.0%
Sep-2025	39	+34.5%	34	+13.3%
Oct-2025	38	+26.7%	37	+15.6%
Nov-2025	41	+24.2%	44	+29.4%
Dec-2025	41	+7.9%	43	+26.5%
Jan-2026	47	+4.4%	44	+12.8%
Feb-2026	37	+8.8%	38	+8.6%
<b>Mar-2026</b>	<b>33</b>	<b>+22.2%</b>	<b>32</b>	<b>-13.5%</b>
12-Month Avg*	28	+25.8%	29	+21.3%

\* Days on Market for all properties from April 2025 through March 2026. This is not the average of the individual figures above.

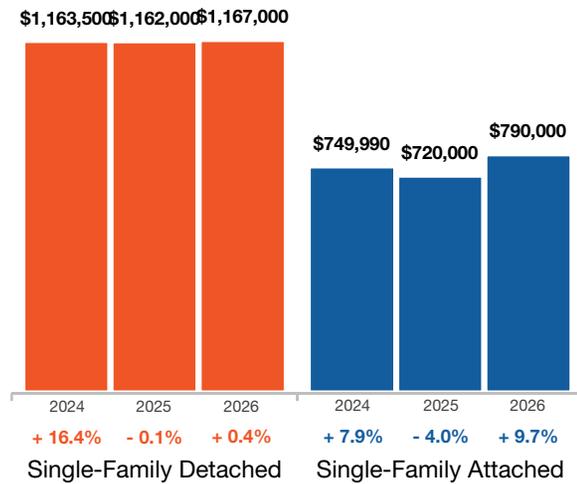
## Historical Days on Market Until Sale by Month



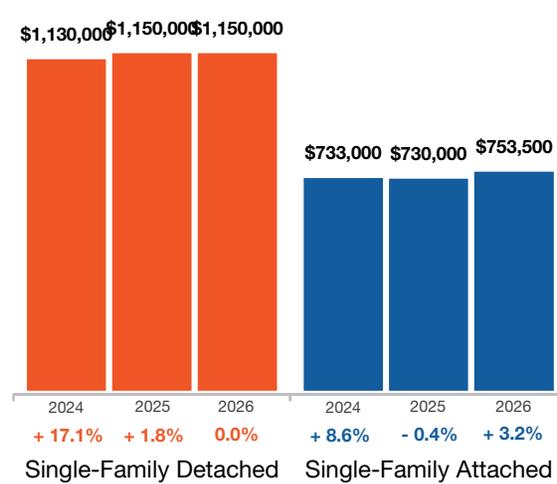
# Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

## March



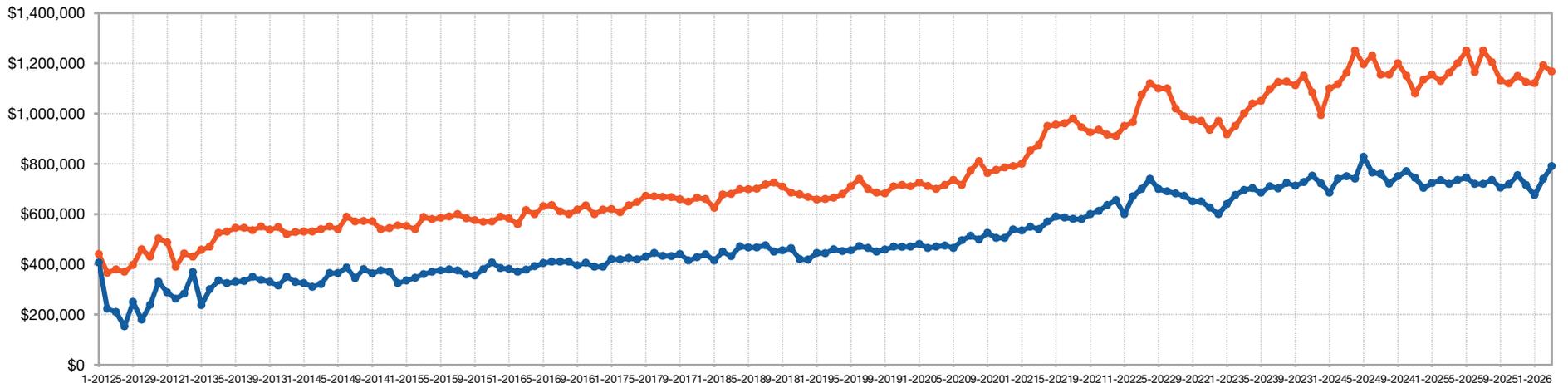
## Year to Date



Median Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	\$1,200,000	-4.0%	\$735,000	-0.7%
May-2025	\$1,250,000	+4.6%	\$744,500	-10.0%
Jun-2025	\$1,165,000	-5.3%	\$719,900	-5.9%
Jul-2025	\$1,250,000	+8.2%	\$720,000	-5.2%
Aug-2025	\$1,203,750	+4.2%	\$735,000	+1.9%
Sep-2025	\$1,131,500	-5.7%	\$705,000	-6.0%
Oct-2025	\$1,120,000	-2.6%	\$718,750	-6.7%
Nov-2025	\$1,149,500	+6.4%	\$754,800	+1.5%
Dec-2025	\$1,125,000	-0.9%	\$715,000	+1.6%
Jan-2026	\$1,121,200	-2.9%	\$675,500	-6.6%
Feb-2026	\$1,192,000	+5.5%	\$740,000	+0.8%
<b>Mar-2026</b>	<b>\$1,167,000</b>	<b>+0.4%</b>	<b>\$790,000</b>	<b>+9.7%</b>
12-Month Avg*	\$1,170,000	+0.4%	\$749,000	-2.7%

\* Median Sales Price for all properties from April 2025 through March 2026. This is not the average of the individual figures above.

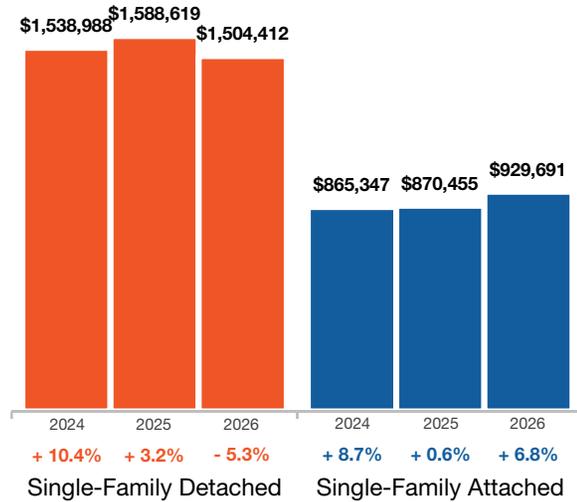
## Historical Median Sales Price by Month



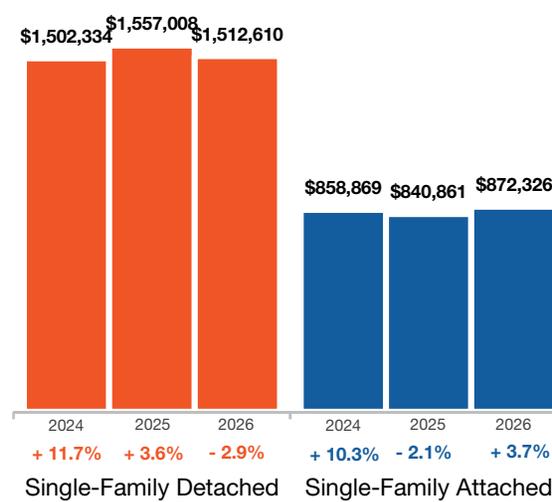
# Average Sales Price

Average sales price for all closed sales, not accounting for seller concessions, in a given month.

## March



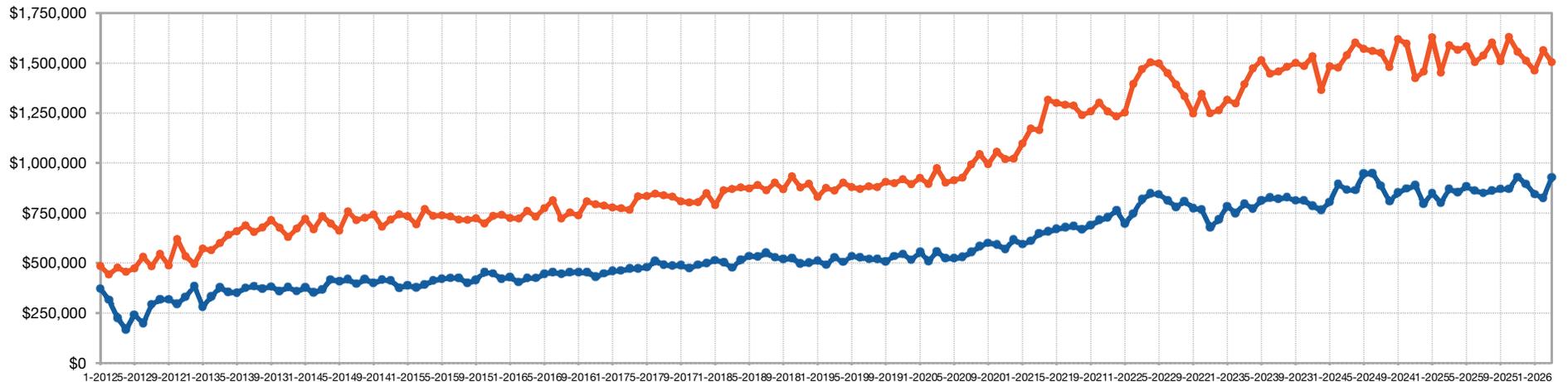
## Year to Date



Avg. Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	\$1,565,992	-2.2%	\$854,465	-1.2%
May-2025	\$1,584,046	+0.8%	\$883,688	-6.8%
Jun-2025	\$1,505,164	-3.5%	\$863,892	-8.9%
Jul-2025	\$1,538,085	-0.8%	\$849,544	-4.2%
Aug-2025	\$1,601,739	+8.3%	\$862,274	+6.8%
Sep-2025	\$1,508,255	-6.9%	\$871,211	+2.2%
Oct-2025	\$1,629,771	+2.1%	\$871,369	-0.2%
Nov-2025	\$1,556,145	+9.3%	\$930,984	+4.6%
Dec-2025	\$1,511,680	+3.7%	\$894,977	+12.4%
Jan-2026	\$1,462,050	-10.2%	\$843,603	-0.7%
Feb-2026	\$1,563,928	+7.7%	\$825,344	+3.2%
<b>Mar-2026</b>	<b>\$1,504,412</b>	<b>-5.3%</b>	<b>\$929,691</b>	<b>+6.8%</b>
12-Month Avg*	\$1,544,272	+0.1%	\$873,420	+0.8%

\* Avg. Sales Price for all properties from April 2025 through March 2026. This is not the average of the individual figures above.

## Historical Average Sales Price by Month

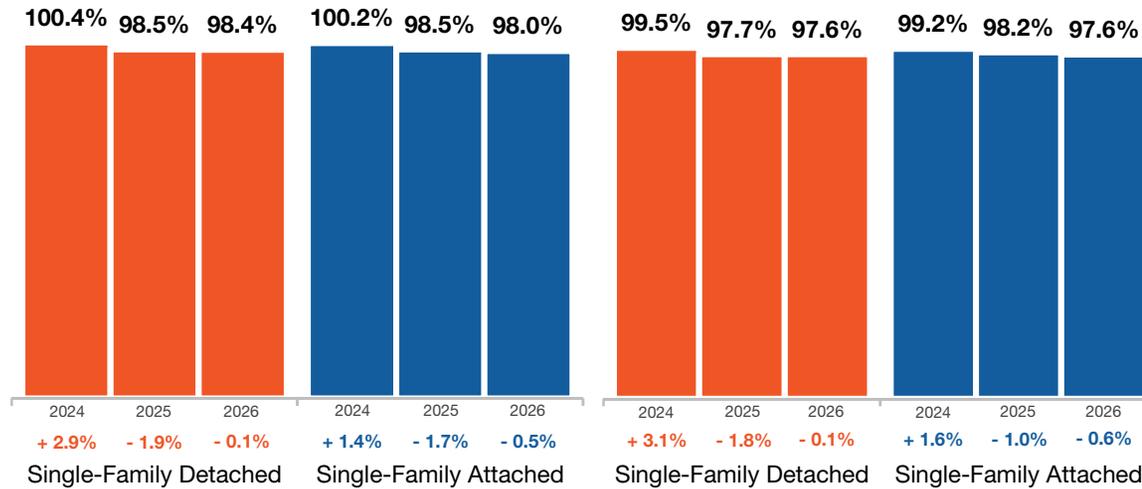


# Percent of Original List Price Received

Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

## March

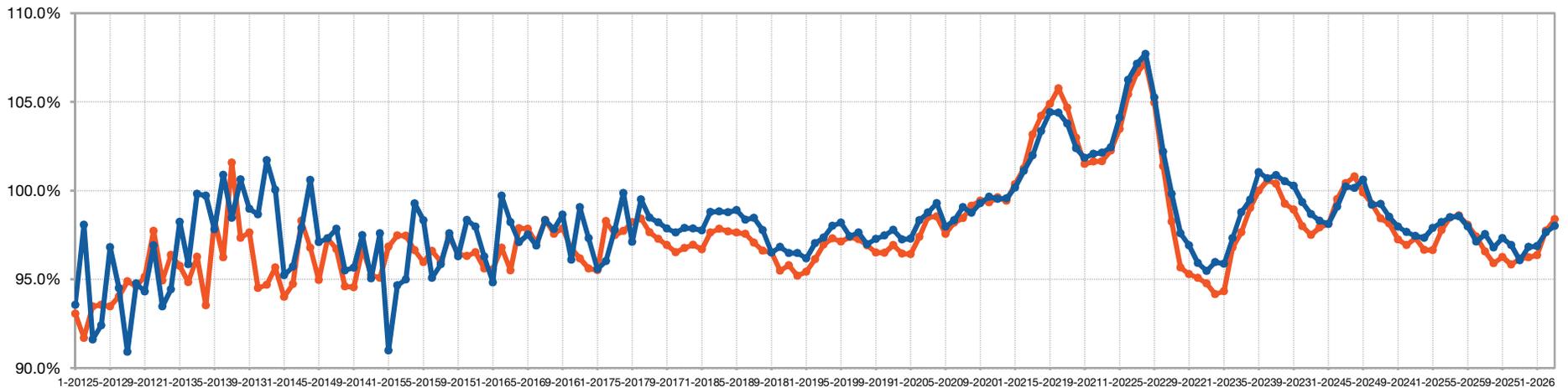
## Year to Date



Pct. of Orig. Price Received	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	98.6%	-2.2%	98.6%	-1.5%
May-2025	98.1%	-1.8%	98.0%	-2.6%
Jun-2025	97.4%	-1.8%	97.1%	-2.1%
Jul-2025	96.6%	-1.8%	97.5%	-1.7%
Aug-2025	95.9%	-2.2%	96.8%	-1.7%
Sep-2025	96.2%	-1.0%	97.3%	-0.7%
Oct-2025	95.8%	-1.1%	96.9%	-0.8%
Nov-2025	96.2%	-1.1%	96.1%	-1.3%
Dec-2025	96.2%	-0.5%	96.8%	-0.5%
Jan-2026	96.4%	-0.2%	96.9%	-1.0%
Feb-2026	97.7%	-0.1%	97.6%	-0.6%
<b>Mar-2026</b>	<b>98.4%</b>	<b>-0.1%</b>	<b>98.0%</b>	<b>-0.5%</b>
12-Month Avg*	97.0%	-1.3%	97.3%	-1.3%

\* Pct. of Orig. Price Received for all properties from April 2025 through March 2026. This is not the average of the individual figures above.

## Historical Percent of Original List Price Received by Month

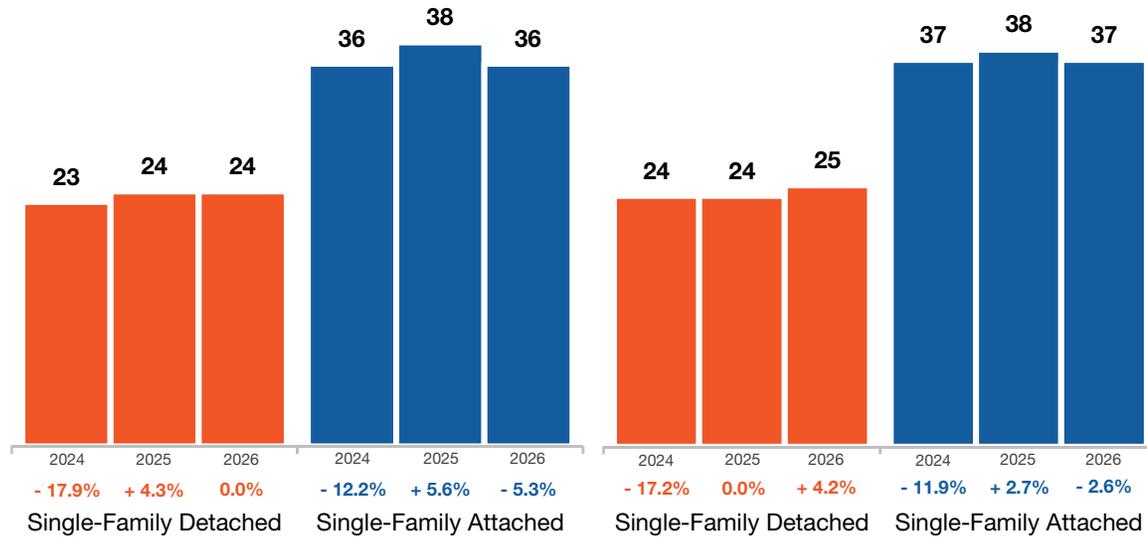


# Housing Affordability Index

This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

## March

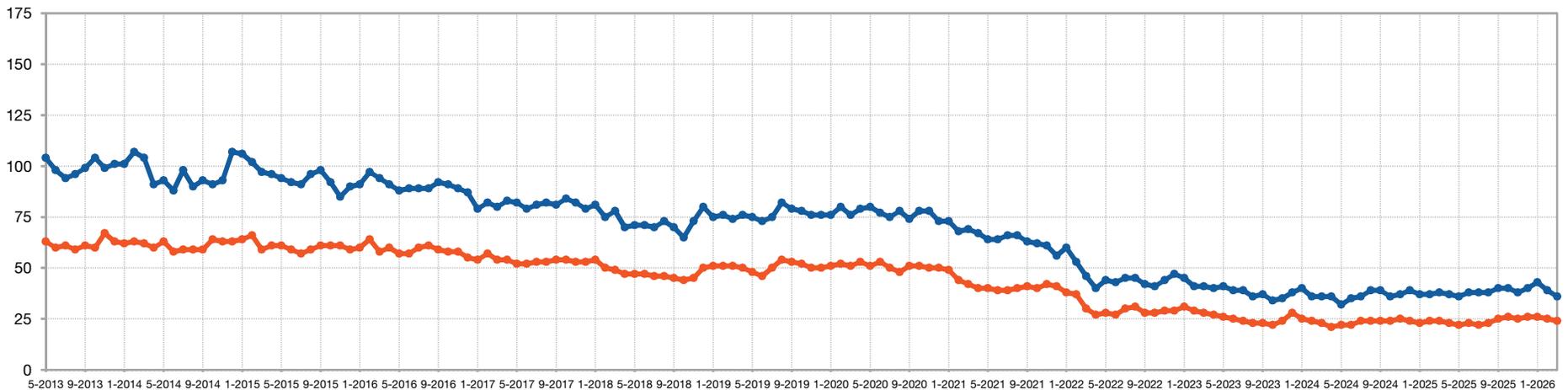
## Year to Date



Affordability Index	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	23	+9.5%	37	+2.8%
May-2025	22	0.0%	36	+12.5%
Jun-2025	23	+4.5%	38	+8.6%
Jul-2025	22	-8.3%	38	+5.6%
Aug-2025	23	-4.2%	38	-2.6%
Sep-2025	25	+4.2%	40	+2.6%
Oct-2025	26	+8.3%	40	+11.1%
Nov-2025	25	0.0%	38	+2.7%
Dec-2025	26	+8.3%	40	+2.6%
Jan-2026	26	+13.0%	43	+16.2%
Feb-2026	25	+4.2%	39	+5.4%
<b>Mar-2026</b>	<b>24</b>	<b>0.0%</b>	<b>36</b>	<b>-5.3%</b>
12-Month Avg*	24	+2.6%	39	+5.1%

\* Affordability Index for all properties from April 2025 through March 2026. This is not the average of the individual figures above.

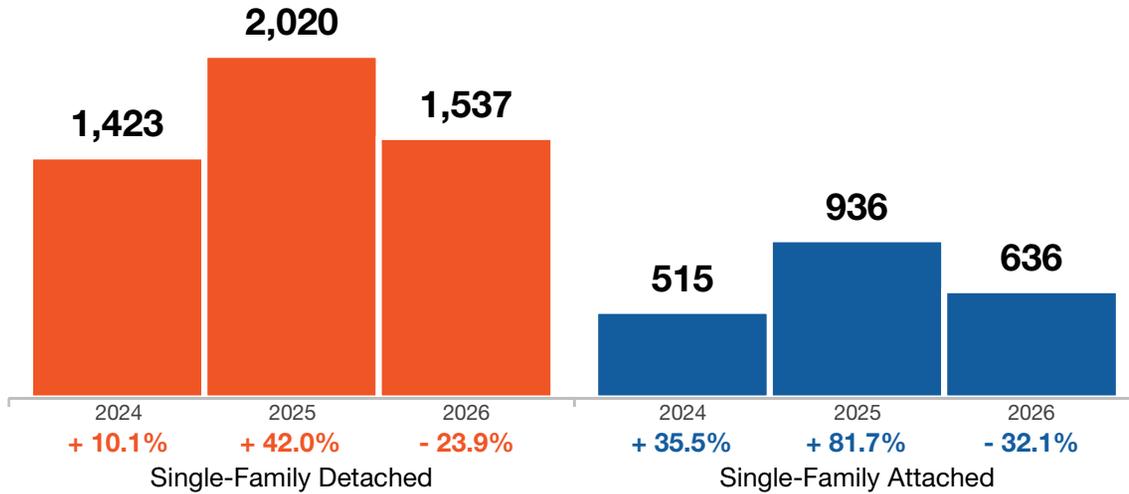
## Historical Housing Affordability Index by Month



# Inventory of Homes for Sale

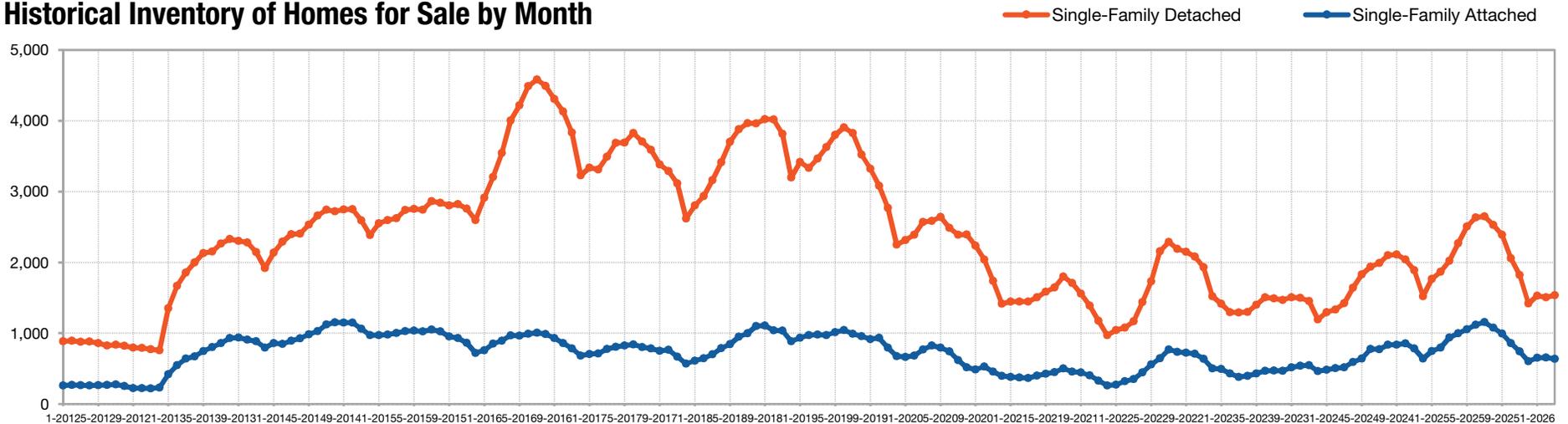
The number of properties available for sale in active status at the end of a given month.

## March



Homes for Sale	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	2,269	+38.3%	996	+68.0%
May-2025	2,505	+37.0%	1,055	+64.8%
Jun-2025	2,635	+35.8%	1,117	+44.1%
Jul-2025	2,649	+33.2%	1,155	+49.8%
Aug-2025	2,528	+20.4%	1,077	+29.0%
Sep-2025	2,388	+13.0%	995	+19.0%
Oct-2025	2,059	+0.9%	857	+0.4%
Nov-2025	1,821	-3.6%	743	-5.2%
Dec-2025	1,418	-6.8%	602	-6.1%
Jan-2026	1,530	-13.3%	653	-12.3%
Feb-2026	1,505	-19.4%	657	-17.2%
<b>Mar-2026</b>	<b>1,537</b>	<b>-23.9%</b>	<b>636</b>	<b>-32.1%</b>
12-Month Avg	1,893	+9.4%	767	+14.6%

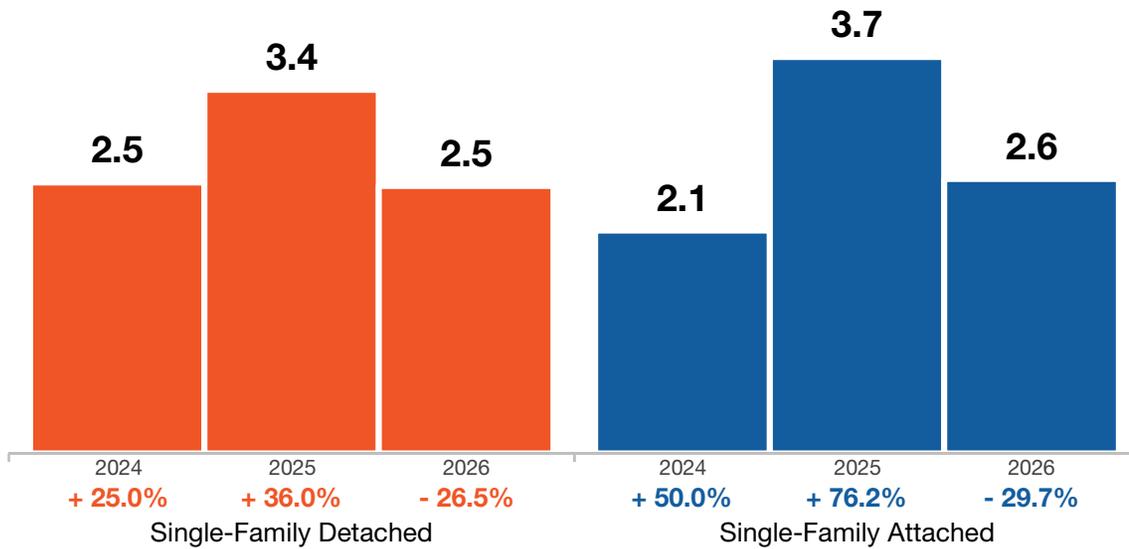
## Historical Inventory of Homes for Sale by Month



# Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

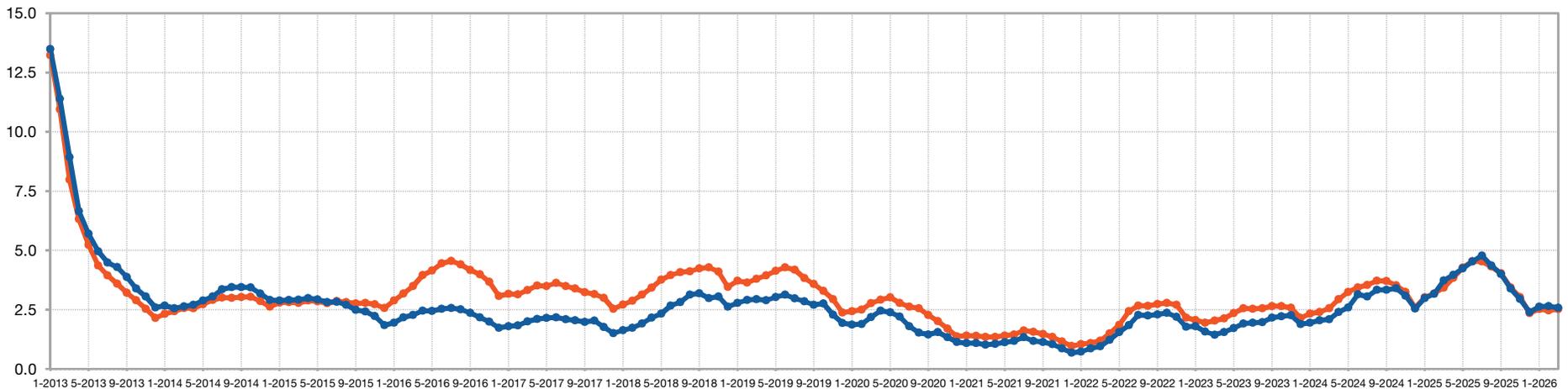
## March



Months Supply	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Apr-2025	3.8	+31.0%	4.0	+66.7%
May-2025	4.3	+34.4%	4.2	+61.5%
Jun-2025	4.5	+32.4%	4.5	+45.2%
Jul-2025	4.5	+28.6%	4.8	+54.8%
Aug-2025	4.3	+16.2%	4.4	+33.3%
Sep-2025	4.0	+8.1%	4.0	+21.2%
Oct-2025	3.4	-2.9%	3.4	0.0%
Nov-2025	3.0	-6.3%	2.9	-6.5%
Dec-2025	2.4	-7.7%	2.4	-4.0%
Jan-2026	2.5	-16.7%	2.6	-13.3%
Feb-2026	2.5	-21.9%	2.6	-18.8%
<b>Mar-2026</b>	<b>2.5</b>	<b>-26.5%</b>	<b>2.6</b>	<b>-29.7%</b>
12-Month Avg*	3.3	+5.9%	3.1	+15.5%

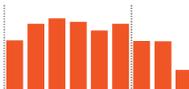
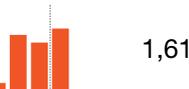
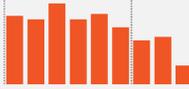
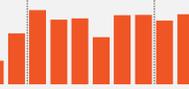
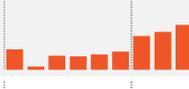
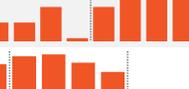
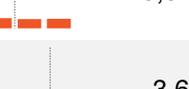
\* Months Supply for all properties from April 2025 through March 2026. This is not the average of the individual figures above.

## Historical Months Supply of Inventory by Month



# All Properties Combined

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars			3-2025	3-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	03-2024	03-2025	03-2026						
New Listings				1,616	1,380	- 14.6%	4,300	3,872	- 10.0%
Pending Sales				969	955	- 1.4%	2,526	2,567	+ 1.6%
Closed Sales				817	880	+ 7.7%	2,177	2,186	+ 0.4%
Days on Market				30	33	+ 10.0%	35	38	+ 8.6%
Median Sales Price				\$980,000	\$1,010,000	+ 3.1%	\$985,000	\$1,005,000	+ 2.0%
Average Sales Price				\$1,364,771	\$1,344,222	- 1.5%	\$1,333,257	\$1,335,200	+ 0.1%
Pct. of Orig. Price Received				98.5%	98.3%	- 0.2%	97.9%	97.6%	- 0.3%
Housing Affordability Index				28	28	0.0%	28	28	0.0%
Inventory of Homes for Sale				3,013	2,175	- 27.8%	--	--	--
Months Supply of Inventory				3.6	2.5	- 30.6%	--	--	--