

# SAN BERNARDINO COUNTY MARKET REPORT

# SR

## MARKET INSIGHTS • 2025



5.0%

Unemployment Rate



3,417

SFD New Home Permits LTM



1,776

SFD New Home Closings LTM

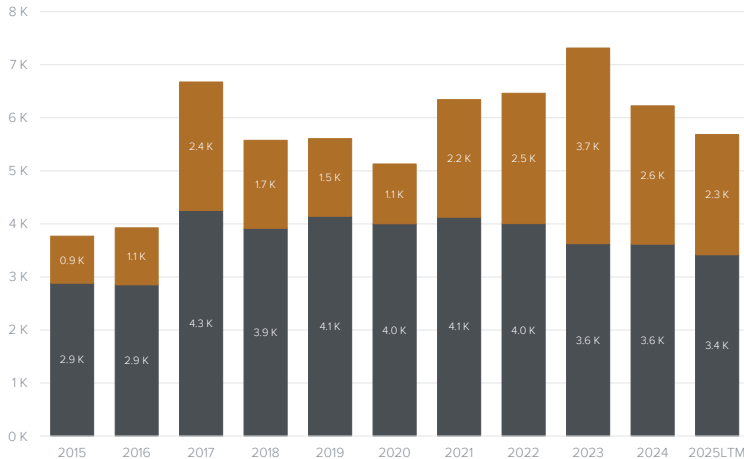


\$673,500

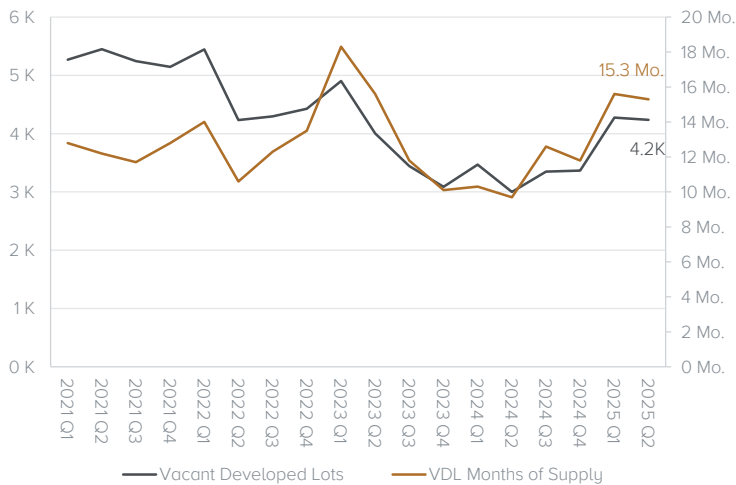
Median SFD New Home Price LTM

## NEW HOUSING TRENDS<sup>1</sup>

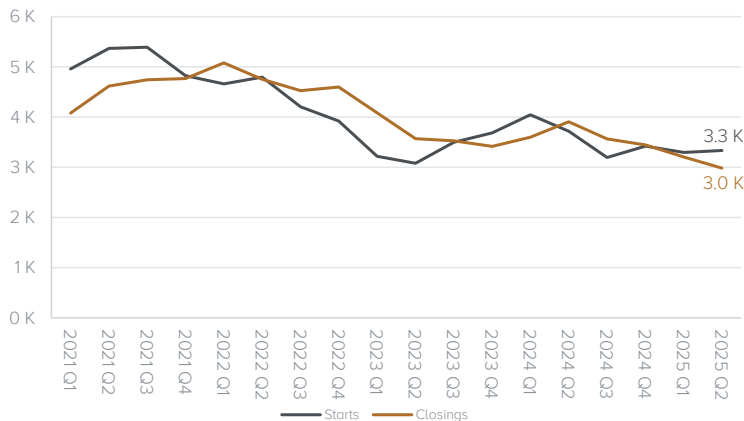
### Single Family & Multi-Family Permits



### Vacant Developed Lot Study



### Annual Starts vs Closings



### NEW HOME STARTS



Q2 2024  
3,716  
Q2 2025  
3,332  
10.33%

### NEW HOME CLOSINGS

23.64%

Q2 2024  
3,904  
Q2 2025  
2,981



### MEDIAN SFD NEW HOME PRICE



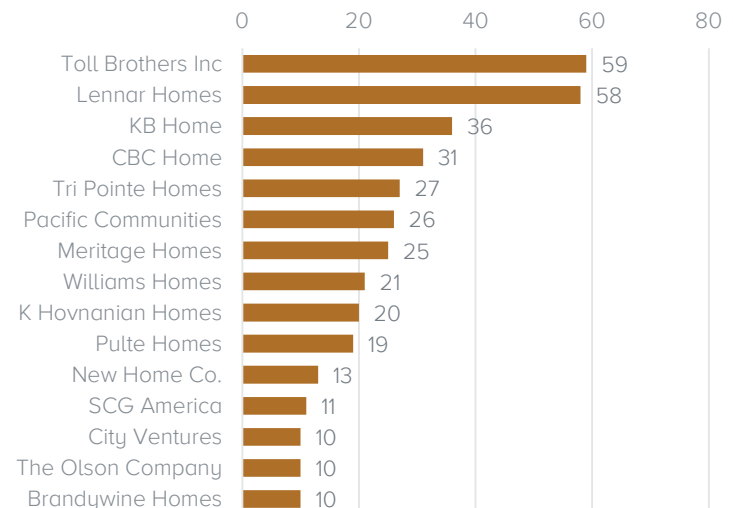
2024  
\$665,875  
2025 LTM  
\$673,500  
1.15%

### New Housing Trends Insights

In the wake of slower sales, new home incentives have increased significantly over the last year, particularly on the Ontario Ranch. There are currently 22 actively selling new home projects in the Ontario Ranch, nearly all of which offer non-conventional SFD homes (alley, cluster) or attached homes. Nearly all builders are offering a closing cost credit or flex cash, along with rate buydowns to a sub-5% rate. Generous incentives, along with some price cuts, have kept sales at relatively healthy levels. Countywide sales in the quarter averaged 3.0/mo/project, down from 3.9/mo in Q2 2024.

*Commentary provided by Clarity Real Estate Advisors.*

### Home Builder Rankings by Closings Q2 2025



## RESALE STATISTICS<sup>2</sup>

### CLOSED SALES

24-Jun  
**1,387**

▲ 4.40%

25-Jun  
**1,448**

### MEDIAN SALE PRICE

24-Jun  
**\$540,000**

▲ 2.78%

25-Jun  
**\$555,000**

### MONTHS OF HOME INVENTORY

24-Jun  
**4 Mo.**

▼ 75.00%

25-Jun  
**1 Mo.**

### MEDIAN DAYS ON MARKET

24-Jun  
**34 Days**

▲ 35.30%

25-Jun  
**46 Days**

## ECONOMIC TRENDS<sup>3</sup>

### UNEMPLOYMENT RATE

#### SAN BERNARDINO COUNTY

2024	2025
<b>5.10%</b>	<b>5.00%</b>
▼ 1.96%	

#### CALIFORNIA

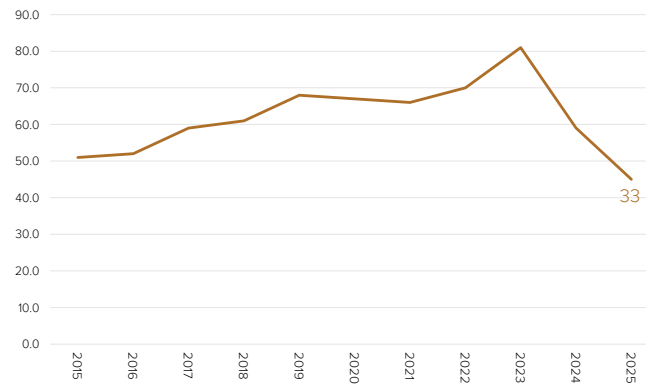
2024	2025
<b>5.20%</b>	<b>5.40%</b>
▲ 3.85%	



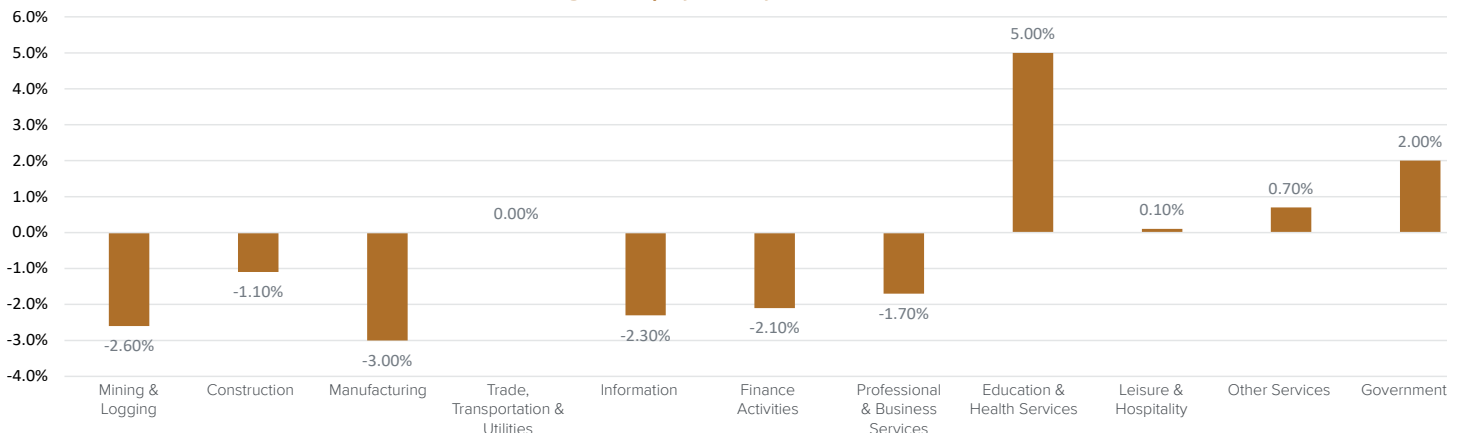
### Housing Market Index in the U.S.

The Housing Market Index is designed to take the pulse of the single-family housing market. The survey asks respondents to rate market conditions for the sale of new homes at the present time and in the next six months as well as the traffic of prospective buyers of new homes. A reading above the 50 benchmark indicates most builders see conditions as positive.

### 30-Year Fixed Mortgage Average in the US



### YOY Change in Employment by Sector in California



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SAN DIEGO, CA  
SANTA BARBARA, CA  
VALENCIA, CA  
LODI, CA  
FRESNO, CA  
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ORLANDO, FL

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