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Luxury Market Report



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Your quarterly snapshot of the South Florida housing market:

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Illustrated Properties is a legend in the Florida real estate market. Let our unmatched experience and knowledge work for you.

- South Florida Region
- Palm Beach County
- Martin County
- Boca Raton/Delray Beach
- West Palm Beach
- Wellington
- PBG/North Palm Beach
- Jupiter

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YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

Luxury sales of of single-family homes and condo / townhomes in the first quarter of 2020 in South Florida were both up by double digits from a year ago, while the median sales price declined slightly in both segments.



YOUR Q1 TAKEAWAYS:

Luxury single-family home sales were up 21 percent to 819 sales for Q1 2020 from 677 sales in Q1 2019. Luxury condo / townhome sales were up 12.8 percent, growing from 358 sales in Q1 2019 to 404 sales in Q1 2020. While sales were up, median sales prices declined 3 percent for single-family homes and .3 percent for condo / townhomes.

THE TOP SALE

\$37.25 MILLION

This stunning new oceanfront estate located at 530 South Ocean Boulevard in Palm Beach is 14,000 square feet of exceptional finishes with both modern and traditional interior design aspects. Designed by Smith & Moore Architects with Marc-Michaels Interior Design. Stone and wood flooring, intricate moldings and luxury finishes throughout with no attention to detail spared.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	677	819	+21.0%	▲
💰 Average Sales Price	\$2,485,452	\$2,543,731	+2.3%	▲
🏠 Median Sales Price	\$1,674,000	\$1,625,000	-3.0%	▼
🏠 Average Square Footage	4,565	4,380	-4.1%	▼
💰 Price Per Square Foot	\$528	\$537	+1.7%	▲

2020 Q1 A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	358	404	+12.8%	▲
💰 Average Sales Price	\$2,488,049	\$2,189,709	-12.0%	▼
🏠 Median Sales Price	\$1,600,000	\$1,595,000	-0.3%	▼
🏠 Average Square Footage	2,776	2,670	-3.8%	▼
💰 Price Per Square Foot	\$831	\$761	-8.4%	▼

Luxury sales were significantly higher in Q1 2020 and median sales prices were down slightly. Cash sales increased by 21.3 percent in the single-family segment and 9.4 percent in condos / townhomes.

YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

Sales of single-family and condo / townhome properties were up significantly in Q1 2020 versus Q1 2019. Cash sales were up significantly as well. Median sales prices declined across the board, with single-family homes down 5.4 percent and condo / townhome down 13.9 percent.



YOUR Q1 TAKEAWAYS:

Palm Beach County single-family home sales were up 24.5 percent in Q1 2020, with 277 sales in Q1 2019 climbing to 345 sales in Q1 2020. Condo / townhome sales were up 34.9 percent, from 109 sales in Q1 2019 to 147 sales in Q1 2020.

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2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	277	345	+24.5%	▲
💰 Average Sales Price	\$2,711,074	\$2,964,842	+9.4%	▲
🏠 Median Sales Price	\$1,850,000	\$1,750,000	-5.4%	▼
📏 Average Square Footage	4,698	4,784	+1.8%	▲
💰 Price Per Square Foot	\$572	\$565	-1.2%	▼

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	109	147	+34.9%	▲
💰 Average Sales Price	\$2,627,211	\$2,334,967	-11.1%	▼
🏠 Median Sales Price	\$1,550,000	\$1,765,000	-13.9%	▼
📏 Average Square Footage	2,994	3,024	+1.0%	▲
💰 Price Per Square Foot	\$788	\$744	-5.6%	▼

The Palm Beach County luxury housing market sales moved solidly higher, while median sales prices were down slightly in all segments.

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YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

The Martin County luxury residential real estate market in Q1 2020 had an 18.2 decrease in single-family residential homes compared to Q1 2019 and saw double-digit declines in median sales price as well.



YOUR Q1 TAKEAWAYS:

Single-family home sales in Q1 2020 decreased notably, down from 33 homes in Q1 2019 to just 27 homes in Q1 2020. Median sales price decreased 24.4% from a year ago, moving from \$2,200,000 to \$1,662,750.

THE
TOP
SALE

\$15 MILLION

"Il Santuario," a lavish Sailfish Point estate at 2976 SE Dune Drive in Stuart, with its magnificent oceanfront setting, is breathtaking from the moment you arrive. Verandas, tropical gardens, and a koi river overlook ocean views while the exquisite marble, stone, and hand painted ceilings adorn the interior. A rare and exquisite opportunity.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	33	27	-18.2%	▼
💰 Average Sales Price	\$2,714,470	\$3,059,469	+12.7%	▲
🏠 Median Sales Price	\$2,200,000	\$1,662,750	-24.4%	▼
📏 Average Square Footage	4,944	4,757	-3.8%	▼
💰 Price Per Square Foot	\$541	\$574	+6.1%	▲

Martin County luxury single-family home sales declined, as did the median sales prices of those homes.

YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

Strong sales activity in the Boca Raton / Delray Beach luxury market boosted the single-family median sales price, but similarly strong sales in the condo / townhome segment saw a median sales price decline.



YOUR Q1 TAKEAWAYS:

THE TOP SALE **\$17 MILLION**

The Sundra Estate located at 9200 Rockybrook Way in Delray Beach is an impeccable new contemporary masterpiece. Located in the private Stone Creek Ranch, the Sundra Estate's fine materials, craftsmanship and architectural magnificence are rarely available in such a perfected package.

The Boca Raton / Delray Beach luxury market had a vibrant Q1 2020, with sales significantly higher. Single-family residential sales were up a substantial 33.3 percent, condo / townhome sales up 28.6 percent, and median sales prices climbed 5.4 percent for single-family homes, but slid 12.1 percent for condos / townhomes.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	111	148	+33.3% ▲
💰 Average Sales Price	\$2,487,291	\$2,447,820	-1.6% ▼
🏠 Median Sales Price	\$1,613,000	\$1,700,000	+5.4% ▲
📏 Average Square Footage	4,807	5,207	+8.3% ▲
💰 Price Per Square Foot	\$491	\$469	-4.5% ▼

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	35	45	+28.6% ▲
💰 Average Sales Price	\$2,134,665	\$1,885,225	-11.7% ▼
🏠 Median Sales Price	\$1,650,000	\$1,450,000	-12.1% ▼
📏 Average Square Footage	3,143	3,022	-3.8% ▼
💰 Price Per Square Foot	\$659	\$617	-6.4% ▼

Boca Raton / Delray Beach luxury home prices were mixed for the quarter, but strong sales demonstrated significant buyer interest in the market.

YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

The overall total sales in West Palm Beach's luxury market moved higher from Q1 2019. Single-family residential sales totaled 21 for the quarter, up 31.3 percent from a year ago, and condo / townhome sales totaled 7, down 22.2 percent from Q1 2019.



YOUR Q1 TAKEAWAYS:

The West Palm Beach luxury market saw a mixed first quarter, with growth in single-family home sales and a decline in condo/townhome sales. Prices were mixed as well, with the median sales price of single-family homes dropping 3.8 percent, while the median sales price of condo/townhome properties nearly doubled to \$6,030,000, albeit on just 7 sales.

THE TOP SALE

\$12.2 MILLION

1100 S Flagler Dr Unit 22C in West Palm Beach is a 2019-built condo featuring iconic and unobstructed views of the ocean and intercoastal region. Setting the new standard for luxury in West Palm Beach with flow-through residences with dramatic ceiling heights, floor-to-ceiling glass and access to the 25-story building's amenities with pools, a salon, spa, gym, and valet.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	16	21	+31.3% ▲
💰 Average Sales Price	\$1,835,125	\$1,737,715	-5.3% ▼
🏠 Median Sales Price	\$1,580,000	\$1,520,000	-3.8% ▼
🏠 Average Square Footage	4,144	4,002	-3.4% ▼
💰 Price Per Square Foot	\$436	\$440	+0.9% ▲

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	9	7	-22.2% ▼
💰 Average Sales Price	\$9,195,203	\$5,581,316	-39.3% ▼
🏠 Median Sales Price	\$3,116,000	\$6,030,000	+93.5% ▲
🏠 Average Square Footage	5,168	3,653	-29.3% ▼
💰 Price Per Square Foot	\$1,433	\$1,345	-6.1% ▼

The West Palm Beach luxury housing market had a mixed but overall good Q1 2020, with overall sales activity up slightly from a year before.

YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

Sales for Q1 2020 in the Wellington luxury housing market increased 11.1 percent from Q1 2019, but most other housing metrics trended downward this quarter. The median sales price was down 53.5 percent while price per square foot managed to climb 2.7 percent higher.



YOUR Q1 TAKEAWAYS:

There were two more sales in Q1 2020 compared to Q1 2019, which is one of the few high points in this quarter's activity. Median sales price of homes sold this quarter was more than halved from the year prior, sliding from \$3,225,000 to \$1,500,000.

THE
TOP
SALE

\$23.2 MILLION

This striking equestrian estate located at 13700 Quarter Horse Trail is newly constructed in the exclusive Mallet Hill neighborhood. Situated on nearly four acres of land, the property boasts a main house, caretaker's quarters, 15-stall barn, sand arena, and paddocks. With a contemporary design and all the equestrian amenities, this luxurious new home is perfect for the most discerning of buyers.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	18	20	+11.1%	▲
💰 Average Sales Price	\$3,336,528	\$2,921,405	-12.4%	▼
🏠 Median Sales Price	\$3,225,000	\$1,500,000	-53.5%	▼
🏠 Average Square Footage	5,547	4,465	-19.5%	▼
💰 Price Per Square Foot	\$632	\$649	+2.7%	▲

The Wellington luxury market saw another quarter of strong sales price declines but an uptick in buyer activity to take advantage of the lower price points.

YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

The Palm Beach Gardens / North Palm Beach luxury market had more sales across the market in Q1 2020 than the same period a year ago. At the same time, sales prices slipped significantly for single-family homes while ticking just slightly lower for the condo / townhome segment.



YOUR Q1 TAKEAWAYS:

THE TOP SALE

\$16.95 MILLION

This luxury home located at 11087 Old Harbour Road in North Palm Beach was completely renovated 5 years ago and boasts 6 bedrooms, 8 bathrooms, and nearly 8,000 square feet of living space. Custom details, vaulted ceilings, oversized rooms, a salt water pool, and deep water dock are but a few of the features that make this home a must-see.

The Palm Beach Gardens/North Palm Beach luxury single-family home market saw strong sales for the first quarter of 2020, up 34.1 percent from Q1 2019, while median sales prices declined 20.5 percent. Palm Beach Gardens/North Palm Beach luxury condo/townhome properties had 55.6 percent higher sales for Q1 2020 versus a year ago, while prices slipped a minor 0.2 percent for the same period.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	41	55	+34.1% ▲
💰 Average Sales Price	\$2,412,704	\$2,180,530	-9.6% ▼
🏠 Median Sales Price	\$1,949,000	\$1,550,000	-20.5% ▼
📏 Average Square Footage	5,308	4,437	-16.4% ▼
💰 Price Per Square Foot	\$448	\$470	+4.9% ▲

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	9	14	+55.6% ▲
💰 Average Sales Price	\$1,736,688	\$1,694,625	-2.4% ▼
🏠 Median Sales Price	\$1,490,000	\$1,487,500	-0.2% ▼
📏 Average Square Footage	2,549	2,753	+8.0% ▲
💰 Price Per Square Foot	\$682	\$638	-6.5% ▼

Q1 2020 was strong for the Palm Beach Gardens / North Palm Beach luxury market in terms of sales, with double-digit increases in both the single-family and condo / townhome segments.

YOUR 2020 Q1 SUMMARY

Figures exclusively represent sales of \$1 million or more.

Single-family residential homes saw single digit increases in Q1 2020 as compared to Q1 2019. Median sales prices lost a little ground from a year ago for single-family homes, while they rose for the condo / townhome market.



YOUR Q1 TAKEAWAYS:

The median sales price of single-family luxury homes slipped 12.5 percent in Q1 2020 from a year ago, while the median sales price of luxury condo/townhome properties rose 15.2 percent for the same period.

THE TOP SALE

\$12.25 MILLION

Boasting 599 feet of waterfront and panoramic views of the Loxahatchee River, this private oasis at 5241 Pennock Point Road in Jupiter sets the standard of luxury in South Florida. Nearly 3 acres with stunning outdoor living and entertaining spaces. First floor master with luxury spa-like ensuite. Chef's kitchen, game room, 5 car garage, large office, two laundry rooms, one bedroom apartment and so much more.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	39	42	+7.7% ▲
💰 Average Sales Price	\$2,306,685	\$2,862,463	+24.1% ▲
🏠 Median Sales Price	\$1,922,500	\$1,681,375	-12.5% ▼
🏠 Average Square Footage	4,258	5,026	+18.0% ▲
💰 Price Per Square Foot	\$534	\$518	-3.0% ▼

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change
🏠 Number of Sales	10	8	-20.0% ▼
💰 Average Sales Price	\$1,424,500	\$1,575,625	+10.6% ▲
🏠 Median Sales Price	\$1,312,500	\$1,512,500	+15.2% ▲
🏠 Average Square Footage	2,613	2,530	-3.2% ▼
💰 Price Per Square Foot	\$542	\$529	-2.4% ▼

Jupiter luxury housing single-family home buyers picked up the pace a bit in Q1 2020, closing on three more homes than Q1 2019, while condo / townhome buyers closed on two fewer homes in Q1 this year versus a year ago.

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Palm Beach Island Report



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Your quarterly snapshot of the Palm Beach Island housing market:

- **In Town**
Wells Road South to Worth Ave.
- **North End**
From Wells Road, North
- **Estate Section**
Worth Ave. South to Sloans Curve
- **South End (including Ibis Isle)**
From Sloans Curve, South

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YOUR 2020 Q1 SUMMARY

In Town sales totals in Q1 2020 were nearly equal with Q1 2019, while median sales prices rose significantly for both single-family and condo / co-op / townhome segments. Average square footage of homes sold this quarter was up significantly as well.



YOUR Q1 TAKEAWAYS:

Single-family In Town luxury home sales in Q1 2020 doubled to eight homes sold versus just four sold the year before. Average square footage of single-family homes jumped 41.6 percent for the quarter, helping drive the median sales price up 7.8 percent. The luxury condo / co-op / townhome segment saw average square footage rise 30.5 percent while the median sales price climbed 29.3 percent.

THE
TOP
SALE

\$9.4 MILLION

This Mediterranean style new construction home located at 113 Atlantic Avenue is stunning from the moment you arrive. Modern day floor plan with a transitional charm, this carefully designed home is exceptional throughout. Designed by Portuondo-Perotti and developed by Todd Michael Glaser.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	4	8	+100%	▲
💰 Average Sales Price	\$3,783,726	\$4,842,400	+28.0%	▲
🏠 Median Sales Price	\$3,767,452	\$4,060,375	+7.8%	▲
📏 Average Square Footage	3,089	4,373	+41.6%	▲
💰 Price Per Square Foot	\$1,316	\$1,057	-19.7%	▼

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	43	40	-7.0%	▼
💰 Average Sales Price	\$1,659,306	\$1,893,656	+14.1%	▲
🏠 Median Sales Price	\$895,000	\$1,157,500	+29.3%	▲
📏 Average Square Footage	1,559	2,035	+30.5%	▲
💰 Price Per Square Foot	\$963	\$970	+0.7%	▲

In Town sales activity was healthy in the first quarter this year, with most tracked metrics notably higher to start the year.

YOUR 2020 Q1 SUMMARY

The North End housing market saw a 30 percent increase in sales for Q1 2020 versus the same time last year. While sales were up, prices did decline by single digits.



**YOUR Q1
TAKEAWAYS:**

The North End housing market saw 13 home sales in Q1 2020, up from 10 sales in Q1 2019. While sales increased, the average sales price declined 8.4 percent and the median sales price declined 1.8 percent from the same period a year ago.

THE
TOP
SALE

\$10.5 MILLION

This Colonial Revival 2-story at 1284 N Lake Way is located on the Intracoastal with panoramic water views. Built in 1936 and designed by Gustav Maass, this elegant home features tropical gardens, 90 feet of water frontage with deep water dock, heated pool and a beautiful loggia for entertaining.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	10	13	+30.0%	▲
💰 Average Sales Price	\$5,173,680	\$4,737,346	-8.4%	▼
🏠 Median Sales Price	\$4,175,000	\$4,100,000	-1.8%	▼
📏 Average Square Footage	4,100	3,909	-4.7%	▼
💰 Price Per Square Foot	\$1,339	\$1,192	-11.0%	▼

Sales were a little stronger in Q1 2020 but prices retreated a bit for the quarter.

Estate Section

Worth Ave South to Sloans Curve

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YOUR 2020 Q1 SUMMARY

In the first quarter of 2020, Estate Section had total homes sales double from the first quarter of 2019. Along with the increase in sales, the average and median sales prices increased substantially, as did the average square footage of sold homes.



YOUR Q1 TAKEAWAYS:

The median sales price for Estate Section sales in Q1 2020 increased 71.3 percent, while average sales price increased 76.4 percent. Much of the increase in prices can be attributed to the increase in the size of the homes sold. The average square footage increased from 5,166 square feet in Q1 2019 to 7,596 square feet in Q1 2020, a 47.0 percent increase.

THE
TOP
SALE

\$37.25 MILLION

This stunning, new oceanfront estate located at 530 South Ocean Boulevard in Palm Beach is 14,000 square feet of exceptional finishes with both modern and traditional interior design aspects. Designed by Smith & Moore Architects with Marc-Michaels Interior Design, stone and wood flooring, intricate moldings, and luxury finishes are found throughout the home with no attention to detail spared.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	5	10	+100.0%	▲
💰 Average Sales Price	\$8,723,586	\$15,389,000	+76.4%	▲
🏠 Median Sales Price	\$7,100,000	\$12,162,500	+71.3%	▲
📏 Average Square Footage	5,166	7,596	+47.0%	▲
💰 Price Per Square Foot	\$1,605	\$1,573	-2.0%	▼

The typical single-family home sold in 2019 in the Estate Section was quite a bit smaller than 2018. While the average square footage was 8,638 square feet in 2018, the average single-family home sold in 2019 was only 7,190 square feet.

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YOUR 2020 Q1 SUMMARY

Total homes sales in South End were down just a single sale from 2018's levels. In 2018, 180 total homes sold, while in 2019 there were 179 sales. All but three of those sales were in the condo / co-op / townhome market segment. The median sales price for condos / co-ops / townhomes increased by 4.7 percent, and price per square foot was up by 14.9 percent.



**YOUR Q1
TAKEAWAYS:**

The South End condo / co-op / townhome sales in Q1 2020 were down 18.9 percent from Q1 2019, however the median sales price increased 45.5 percent while price per square foot moved 15 percent higher.

THE
TOP
SALE

\$4.25 MILLION

This Intracoastal gem, located at 2315 Ibis Isle Road, offers sweeping south, east, and west views. Boasting a large, 180 foot deep lot with 105 feet of water frontage, this spacious mid-century modern home, with large pool and waterside terrace, is perfect for entertaining.

2020 Q1 AT A GLANCE: SINGLE FAMILY

Single-Family Residential	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	37	30	-18.9%	▼
💰 Average Sales Price	\$759,085	\$1,028,121	+35.4%	▲
🏠 Median Sales Price	\$550,000	\$800,000	+44.5%	▲
📏 Average Square Footage	1,705	2,092	+22.7%	▲
💰 Price Per Square Foot	\$368	\$423	+15.0%	▲

2020 Q1 AT A GLANCE: CONDO/TOWNHOME

Condo/Townhome	Q1 2019	Q1 2020	%Change	
🏠 Number of Sales	2	1	-50.0%	▼
💰 Average Sales Price	\$4,625,000	\$4,250,000	-8.1%	▼
🏠 Median Sales Price	\$4,625,000	\$4,250,000	-8.1%	▼
📏 Average Square Footage	3,758	3,408	-9.3%	▼
💰 Price Per Square Foot	\$1,167	\$1,247	+6.9%	▲

Although South End condo / co-op / townhome sales dipped, prices climbed significantly higher, buoyed by the sale of larger units in the quarter.