



The Phoenix Housing Market Letter

Metro Phoenix Housing Market Data and Analysis -Since 1985

The most accurate, timely and trusted housing market data available in the region

Published by RL Brown Reports/Home Builders Marketing, Inc.

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The Phoenix housing news is good and important change is in the wind!

The first half of 2017 housing data is in the bag, as you will see in this edition of our *Phoenix Housing Market Letter* which brings you up-to-date with complete June 2017 market data and the news for this housing market is indeed good, almost across the board.

And while we are diligently working on our July 27th webcast-forecast 2017-2021 **midyear update**, we will use this edition of the market letter to give you a seriously comprehensive look at what happened in June in this marketplace in both new housing and resale housing. You can get a ticket to the forecast presentation on our website, www.RLBrownreports.com. *You will not want to miss it.*

It is becoming more and more obvious as the months here in 2017 go by that while the news is good for both new and resale housing, the winds of change are definitely blowing and that old saying "... the devil is in the details" is definitely operative here in Phoenix in early July 2017. Hopefully, you have already become aware of these "shifts" and have updated your strategies to optimize your market positioning for the coming months and years.

As too often happens, it is easy to fall into the trap of complacency and let the events of the marketplace pass us by. Good news can lull us into thinking that we are right on top of things, that our strategies are brilliant, our execution is timely, our organizations are performing, our decisions are fine-tuned, and our futures are as rosy as the market outlook is.

It is easy to overlook a little slippage here and there or a subtle change in our results over the last month or two, especially when we are buried in the minutia of management and the euphoria of a market that has gone from a buyers' market to sellers' market and from recession to a miniboom.

What changes are ahead? Join us on the 27th for a look at the local housing market that no other source is equipped to provide!

June was a good month for both new and resale housing, despite the hot weather, concerns over affordability, interest rate noise, construction delays, and a shortage of move-in ready new and resale homes! June was also a month where the market shifts that we will explore became even more pronounced, suggesting that we need to focus on the what and where of these changes and how they will impact both the rest of 2017 and the years ahead.

PERMITS	Jun-17
PERMITS BY MONTH	1732
SAME MO LAST YR	1939
PERCENT CHG	-10.68%
YTD PERMITS	9,968
LAST YTD PERMIT	9,356
PERCENT CHG	6.54%

Let's start with permits we counted 1732 new-home permits issued in the metro area in June.

That represents a decline of 10.68% from last June while at the same time the year to date permits are ahead of last year to date by 6.54%, with 9968 permits counted year-to-date here in 2017 vs. 9356 permits at the same point in time in 2016.



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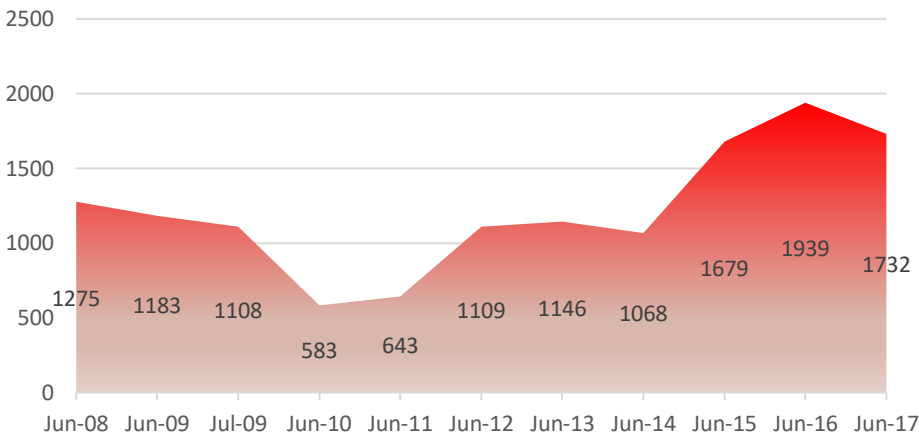
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As expected, Maricopa County continues to dominate the permit activity in the region with 1511 permits in June vs. 221 permits for the month in Pinal County. The June count shows a decline of 8.37% vs. the same month last year for Maricopa County and a and a loss of 23.79% for Pinal County.

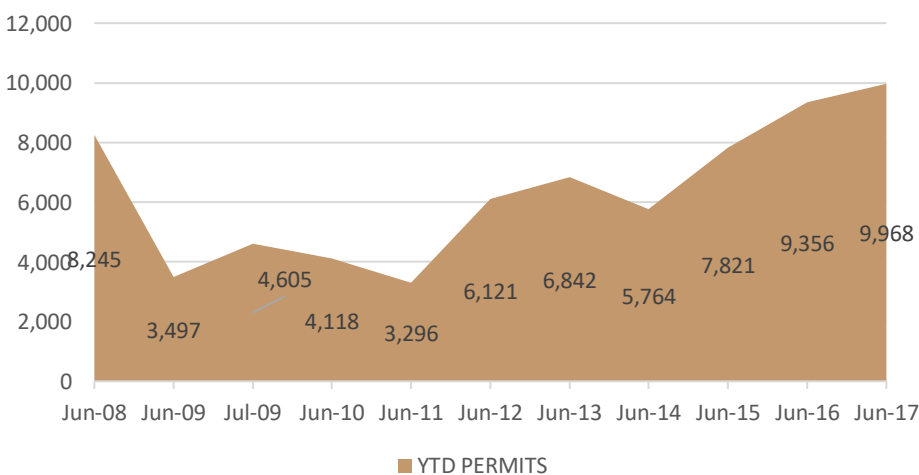
However, year-to-date Maricopa County shows a permit gain of 4.48% while Pinal County gained 21.68%.

METRO PHOENIX NEW HOME PERMITS FOR EACH JUNE 2008-2017



If we compare this **June performance** for each June since 2008 for the overall Metro Phoenix marketplace we see that June 2016 was the best June permit performance that we have seen since June 2008 before we calculated this June permit performance which totaled 1732 and now ranks #2.

YEAR TO DATE IN JUNE NEW HOME PERMITS



When we take a similar look at the **year to date** calculations going back for that same time frame we see that our current standing year-to-date in 2017 represents the **best year-to-date permit performance** that this market has seen in the last 11 years, going back beyond June 2008.

So, while this June monthly permit performance fell behind that of June 2016 our year-to-date activity remains very strong and should not raise a red flag!



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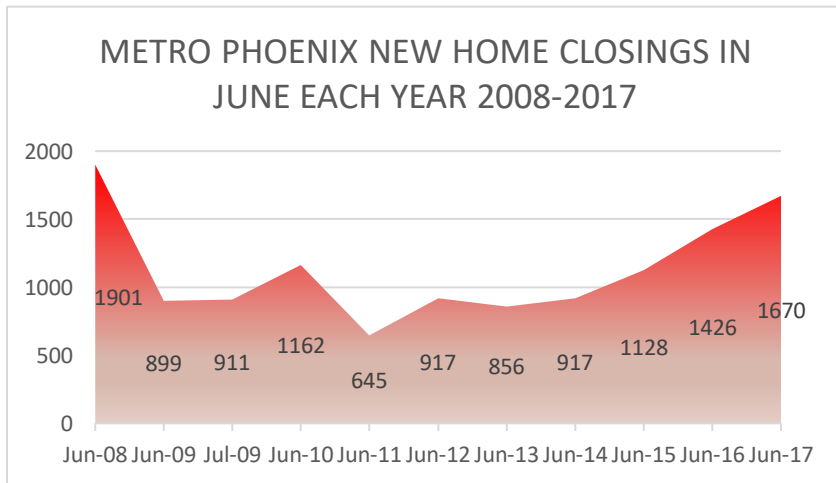
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NEW HOME CLOSINGS	Jun-17
SALES BY MONTH	1670
SAME MO LAST YEAR	1426
PERCENT CHG	17.11%
YTD CLOSINGS	8,833
YTD CLOSINGS LAST YR	7,030
PERCENT CHG	25.65%
AVG NEW PRICE	372,988
MED NEW PRICE	310,077
MED PRICE % CHANGE	-0.08%

While permit activity was down for the month **new home closings** were up 17.11% in June over last June, with 1670 new home closings recorded for the month vs. 1426 last June.

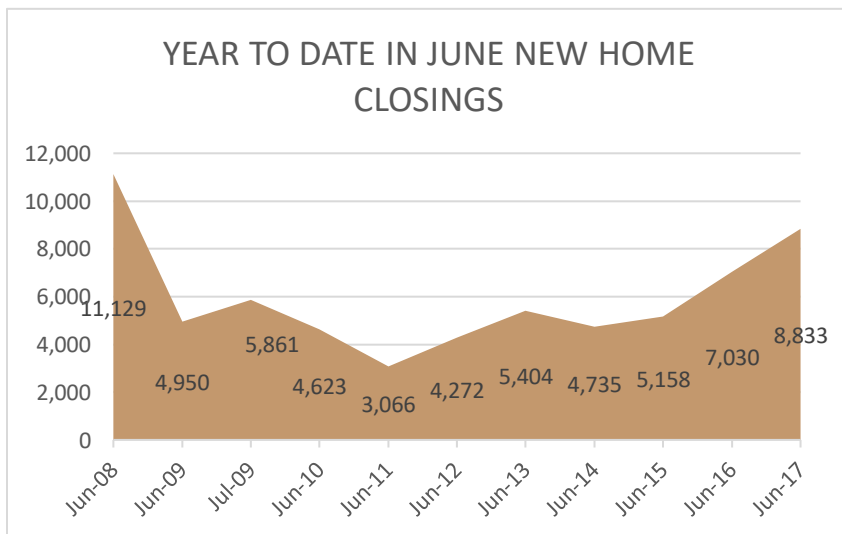
Year-to-date we have counted 8833 home closings vs. 7030 year-to-date last year, for a calculated percentage increase of over 25% year to date, representing an exceptionally strong gain in new home closing activity vs. last year.

In June **1060 of those closings occurred in Maricopa County**, representing a gain of over 22% for Maricopa County over the same month last year, while **170 closings occurred in Pinal County vs. 107 last June**, for gain of 59%.



Year-to-date Maricopa County has a very strong 35% gain in new home closings year-to-date, rising from 5385 counted in the first half of 2016 to 7276 so far this year.

Pinal County had a 29% gain in new home closing activity year-to-date with 987 new home closings vs. 748 for the same period last year.



Overall, this June new home closings were the best our market is seen since June 2008.

Based upon year-to-date new home closings in the Metro Phoenix market this is also the best housing activity that we have seen since June 2008 and also shows the strongest percentage gain in activity that we have seen since those heady “pre-bubble” days. Let the good times roll!

(This data was developed from Volume 392 of Magic Pro using the Absorption Data Set.)



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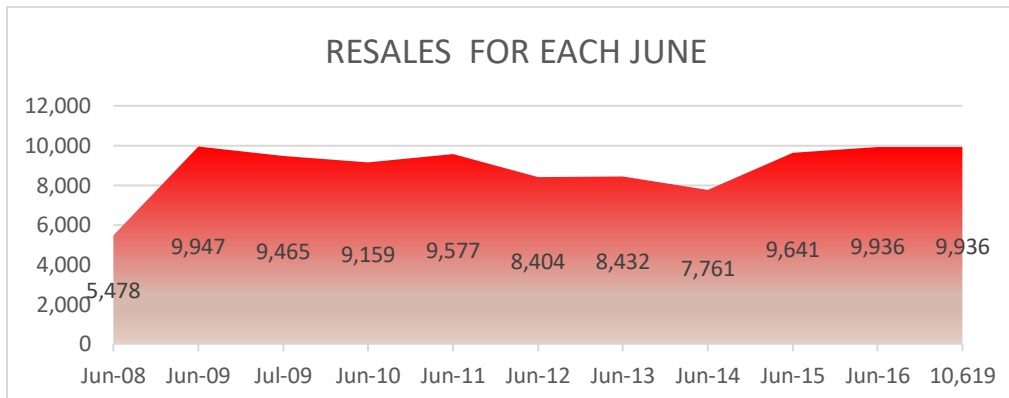
RESALES	Jun-17
RESALES BY MONTH	10,619
SAME MO LAST YR	9,936
PERCENT CHG	6.87%
YTD RESALES	56,251
LAST YTD RESALES	50,844
PERCENT CHG	10.63%
AVG RES PRICE	283,267
MED RES PRICE	231,000
MED PRICE % CHANGE	0.43%

At the same time, we are celebrating a strong new-home marketplace resale housing activity remains at a strong level, with 10,619 resale transactions recorded this past month, including both broker assisted and for-sale-by-owner transactions. That is a 6.87% increase over last year.

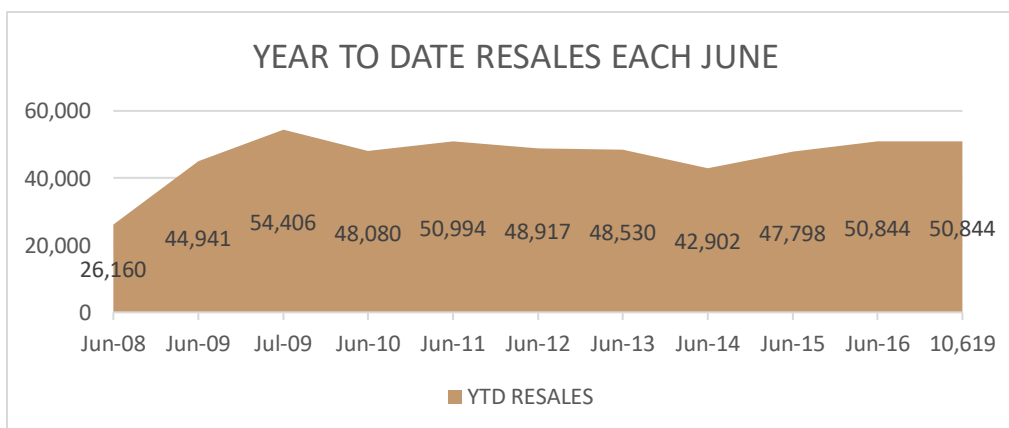
Year-to-date, resales are up 10.63% with a total of 56,251 resale transactions record vs. 50,844 during the first six months of 2016.

Maricopa County saw 7805 of those resales in June for a year-to-date total of 54,236 transactions. That is down 5.37% month over month but up 1.82% for the year-to-date.

Pinal County captured 777 of those overall resale transactions for the month and 5190 resale transactions year-to-date 2017. That represents a 6.44% gain in June and a 9.93% gain for the year-to-date for Pinal County, and suggests an overall increase in housing activity in Pinal County vs. last year.



Our chart of resale activity comparing each of the last 11 Junes shows two important elements, the first is that the resale market has effectively once again reached the same level that it was in 2009, and secondly that the resale market appears to have generally flattened out over the last two years.



This is generally good news for

the new-home side of the market where we are seeing new homes gaining in market share capture vs.

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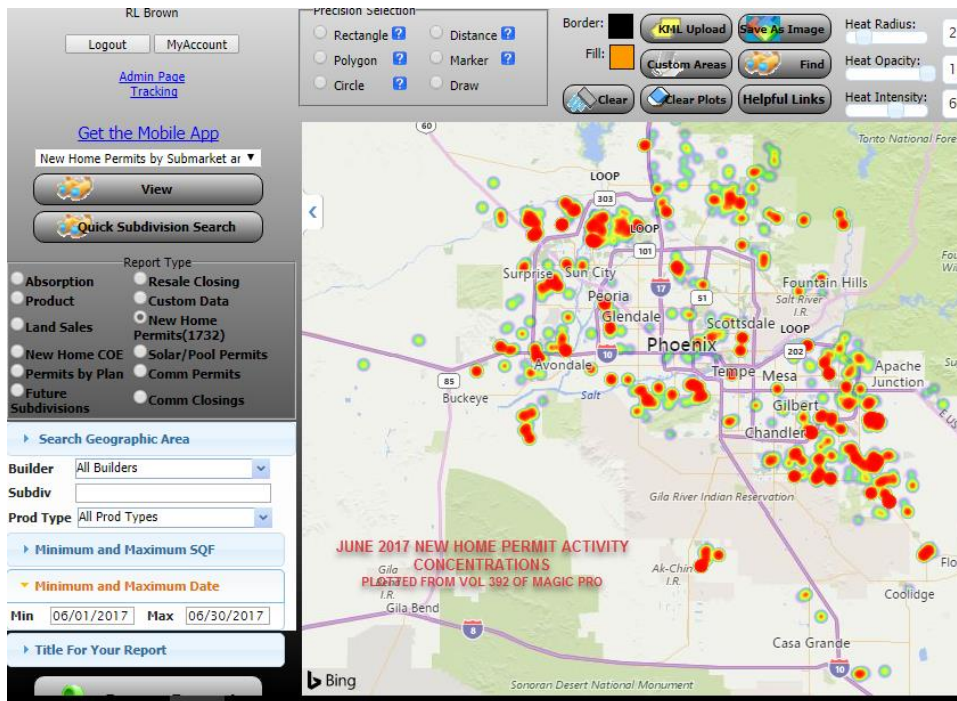
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resale housing. This month new homes captured 13.6% of the overall housing activity in the region, an improvement but still far from the 30-35% capture rates we were spoiled by. The improvement in the new-home capture rate is driven by a combination of factors and will be analyzed in detail in our midyear market update and forecast. Do not miss it!

As you may have already noted from the data tables above, **both new and resale median prices appear to have flattened over the last several months.** This has occurred as we have seen more and more lower-priced products brought to the new-home market while the mix of resale properties appears to have broadened to include more so-called affordable resale homes. This is one of those potentially significant shifts in our housing market that we need to pay attention to.

June 2017 new housing “hotspots”

As you already know, while it is nice to understand the broad details of the marketplace and to be up to date with your market information it is critical to be dialed into the where, what, and who of this new housing market.



The “heat map” on the left plots the relative density of new-home permits issued in the Metro Phoenix area in **June**, and makes it easy to understand where the “hotspots” of new housing activity are **right now**, not at some time last quarter or last year or some other time in the past.

This can be a critical resource for land acquisition strategies

as well as for understanding how your own communities are performing relative to other communities or areas of activity.

It is always interesting to compare one month’s hotspots with the hotspot areas of some other month or year and to be able to graphically see the direction and the dynamics of the geographic shifts of the marketplace.

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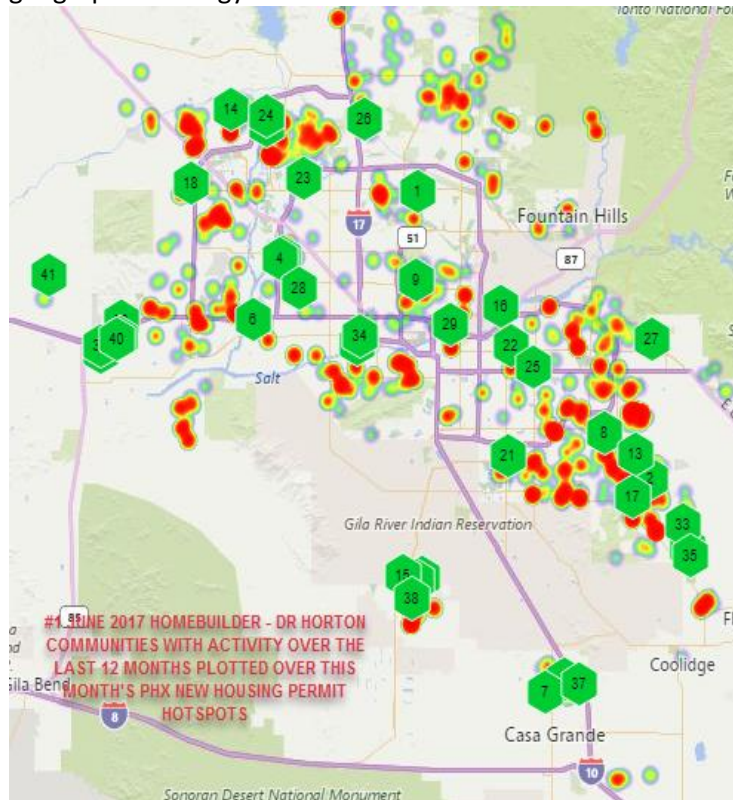
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It is also highly informative to see similar analysis of both recent land acquisitions and already platted but not yet started new home communities as well as a similar analysis of remaining available lots in currently active new-home communities. In combination, future housing hotspots become obvious.

June homebuilder rankings....

DR Horton, Pulte Homes, and Taylor Morrison lead the market this month in permit activity in the region. It is obvious that these homebuilders have done some serious strategic homework about this marketplace.

On the map below, we have overlaid **DR Horton's active new-home communities** with the green icons plotted over the permit hotspot map that we presented on the previous page, demonstrating how this month's market leading builder has positioned his products relative to those hotspots and showing the geographic strategy of this homebuilder.



BUILDER MONTHLY PERMIT RANK	PERMITS JUNE 17
D R HORTON	138
PULTE HOMES COMBINED	133
TAYLOR MORRISON	128
KB HOME	93
LENNAR HOMES	89
CALATLANTIC HOMES	81
MERITAGE HOMES	77
WILLIAM LYON HOMES	74
SHEA HOMES	73
FULTON HOMES	61

Users of our Magic Pro housing data application can produce a similar analysis of the strategic geographic positioning of any homebuilder or group of homebuilders that they choose to examine using permit or closing activity for the month, quarter, or year, overlaid over that same periods housing hotspots.

At the top of the next page we present a graphic depiction of the relative product positioning of this builder's product offerings relative to price and square footage, a further analysis of the strategy adopted by DR Horton for the Metro Phoenix marketplace.

Those of you who are serious students of this marketplace could make a comparison of this strategic positioning with the positioning and strategies of the number two and number three ranking

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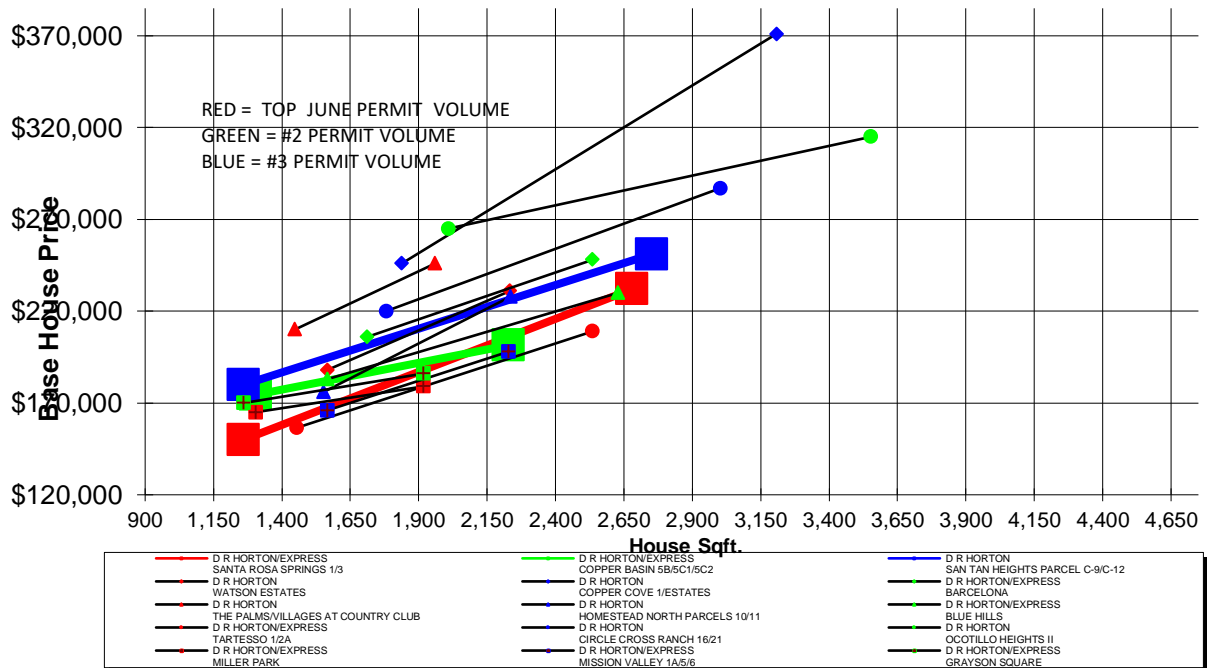
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homebuilders and potentially develop a strategy that would capture the combined best positioning of these three builders and just might yield an even better market share capture!

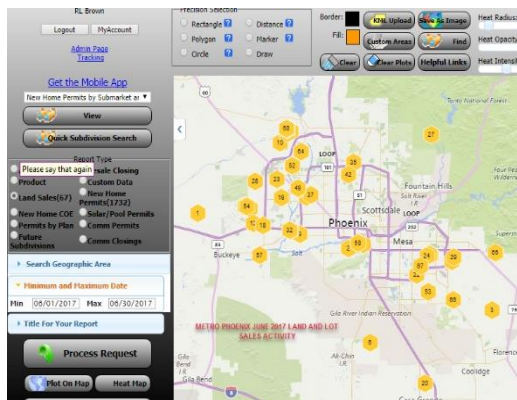
In our July 27 forecast presentation, we will look at builder market share capture over the last six months by price range, by geographic market area, by gross revenue, and by product type yielding additional strategic insight.

DR HORTON JUNE 2017 PRODUCT POSITIONING ANALYSIS GENERATED BY MAGIC PRO VOLUME 392 - DATA FOR JUNE 2017



(This data was developed from Volume 392 of Magic Pro using the Absorption Data Set and the "graphing to Excel" feature)

Land and Lot Sales activity continues a strong pace in June....



We reported on 67 land and lot sales transactions in June throughout the region. The map below shows the locations of those transactions.

They range from the over 1900 finished lot purchase at Tartesso by DR Horton down to small groups of lots taken down by other homebuilders.

Prices per front foot range from \$197 to over \$1800 for those transactions where front foot prices could be independently calculated.



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Details of the transactions that occurred this month and for the last 24 months are available in the Land Sales Data Set in Magic Pro.

New-home vs. resale home activity by city....

Each month we create a unique series of complementary *Executive Reports* for subscribers to Magic Pro where we use the extensive housing market data that is part of Magic Pro to analyze the marketplace in ways which just cannot be found in other off-the-self market information systems. One of those reports looks at and **compares new and resale prices, square footage, and price per square foot by city** for every city in the Metropolitan Phoenix area.

Surprisingly, new housing compares *very favorably* with resale housing in many locations, and this information gives our Realtor clients newly active in marketing *new homes* as well as resale products valuable ammunition for convincing their clients that new homes should be considered in their purchase search. On-site new-home sales people also use it to talk new vs. resale with prospects who visit their sales offices.

JUNE NEW VS RESALES BY CITY

CITY	AVG NEW HOME BASE PRICE	AVG JUNE RESALE PRICE	AVG NEW SQ FT	AVG RESALE SQFT	AVG NEW \$/SQFT	AVG RESALE \$/SQFT
APACHE JUNCTION	\$205,114	\$205,271	1724	1625	\$117.87	\$141.78
AVONDALE	\$251,720	\$211,476	2296	1894	\$108.96	\$116.87
BUCKEYE	\$275,486	\$219,706	2313	2053	\$114.10	\$112.15
CAREFREE	\$609,851	\$726,727	2675	3643	\$214.08	\$200.92
CASA GRANDE	\$193,494	\$163,940	1908	1885	\$100.45	\$96.75
CAVE CREEK	\$617,169	\$486,308	3278	2736	\$186.36	\$186.79
CHANDLER	\$388,718	\$311,165	2581	2089	\$150.08	\$155.82
ELOY	\$213,547	\$132,414	1741	1646	\$125.38	\$84.29
FLORENCE	\$204,840	\$170,149	2120	1918	\$90.33	\$98.12
FOUNTAIN HILLS	\$797,982	\$392,009	3081	2127	\$260.22	\$189.00
GILBERT	\$406,803	\$329,562	2940	2343	\$137.72	\$148.00
GLENDALE	\$362,388	\$227,351	2627	1839	\$130.75	\$131.23
GOODYEAR	\$293,656	\$274,181	2491	2232	\$119.30	\$133.13
LAVEEN	\$254,858	\$228,745	2395	2233	\$108.31	\$108.53
LITCHFIELD PARK	\$374,783	\$326,234	3029	2520	\$134.09	\$132.52
MARICOPA	\$208,283	\$198,089	2151	2315	\$96.67	\$90.90
MESA	\$313,033	\$241,916	2546	1872	\$128.73	\$138.45
PEORIA	\$370,680	\$285,046	2774	2138	\$132.62	\$140.49
PHOENIX	\$351,021	\$248,798	2377	1793	\$148.09	\$152.44
QUEEN CREEK	\$352,122	\$305,959	3062	2512	\$117.53	\$126.23

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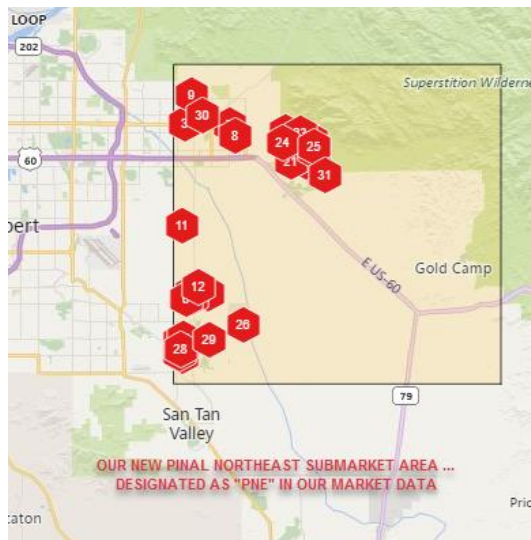
RIO VERDE	\$631,857	\$545,500	2927	2621	\$216.11	\$181.78
SAN TAN VALLEY	\$233,600	\$207,704	2215	2044	\$106.72	\$106.13
SCOTTSDALE	\$769,426	\$524,918	3116	2335	\$248.33	\$222.60
SURPRISE	\$265,589	\$240,192	2523	2021	\$109.85	\$125.54
TEMPE	\$359,962	\$273,964	2045	1772	\$186.87	\$163.85
TOLLESON	\$224,157	\$194,349	2153	1979	\$102.97	\$104.44
WADDELL	\$305,227	\$311,561	2461	2994	\$115.23	\$114.24
WICKENBURG	\$309,100	\$248,163	2106	1620	\$144.69	\$143.08

(This data was developed from Volume 392 of Magic Pro using the Absorption Data Set.)

This is a piece of strategic intelligence that you may well want to spend some time examining in detail.

June housing activity by geographic submarket....

As we have all discovered, the overall Phoenix housing market is actually best scrutinized as a group of geographically diverse markets that have different characteristics, different results, and different opportunities. In the graphics below we use our geographically defined submarket areas to take a look at the June new home activity in each submarket and in the region, demonstrating the market share capture by geographic submarket in a variety of metrics.



Note that **we have added a “new” geographic area** which we have labeled **Pinal-Northeast**. We did this in response to the obvious shifts in the direction of new housing growth that are occurring in our former **Pinal-East** market area where growth east of Queen Creek and Mesa has blossomed.

All of our market data has been updated to reflect this new geographic area and its characteristics and activity, including the widely used geographic area filters in Magic Pro.

The boundaries of this new market area are shown in the graphic on the left, and we anticipate seeing increasing housing activity in this newly-defined area which is already attracting significant interest from both builders and from new housing consumers, as shown in the graphics below.

As of this month there are 13 builder’s active in this **PNE area** in 31 new home communities, with more to come and significant future potential.

As we have already noted, we are seeing the beginnings of a number of shifts in the characteristics of the Metro Phoenix housing market and we will identify and discuss those shifts in our July 27 midyear



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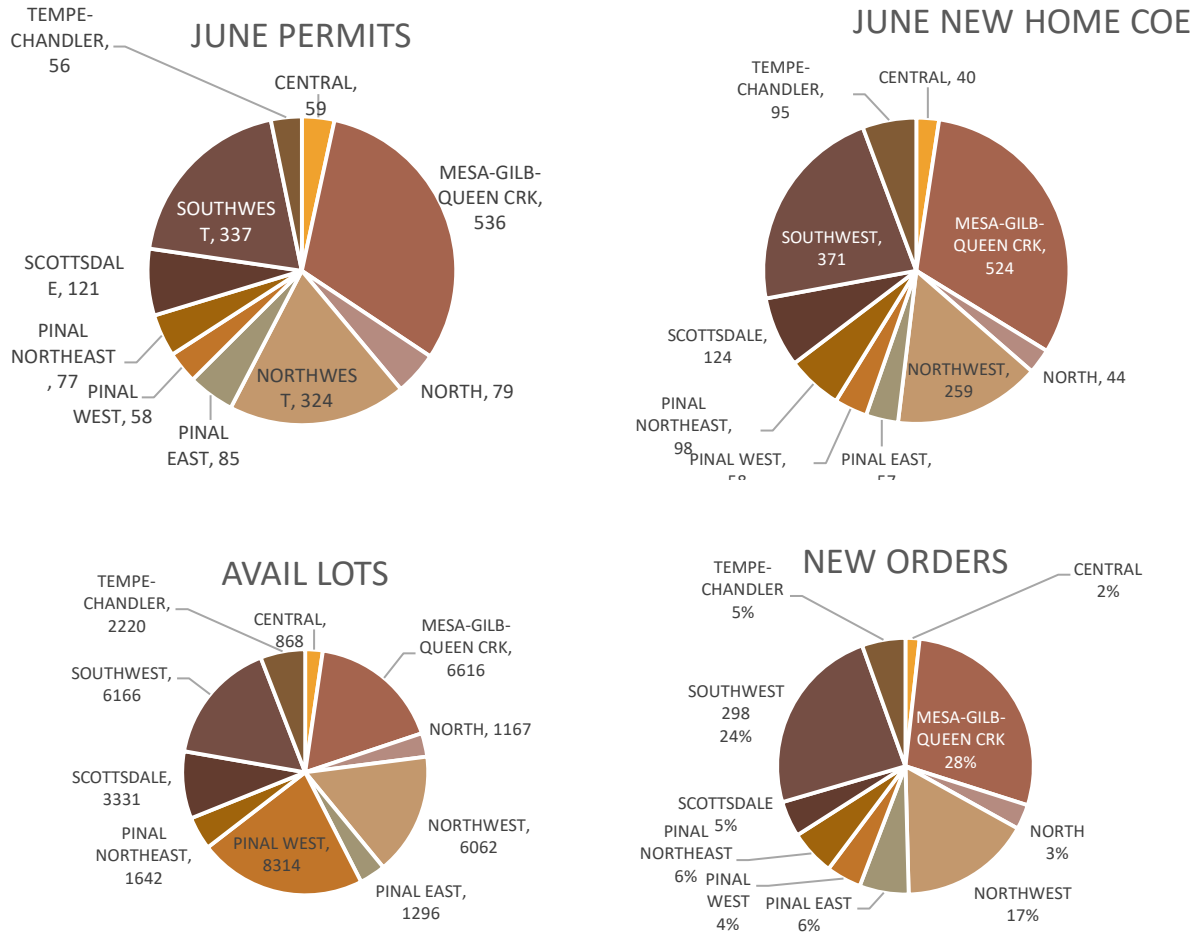
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market and five-year forecast update. This is a live webcast presentation which you and your associates can view in your own conference for the price of one ticket. Get yours today! www.rlbrownreports.com



(The above graphics were created using Volume 392 of Our Magic Professional Housing Data Application)

June 2017 New Home Community Permit Rankings....

In the table below we rank the top performing new home communities based upon their permit activity in the month of June. Criteria for inclusion was for a community to have 15 or more permits for the month.

SUBDIVISION MONTHLY PERMIT RANK	BUILDER	PERMITS JUNE 17
PALM VALLEY/PEBBLECREEK	ROBSON COMMUNITIES	31
CUSTOM - S (MC) - BULK PERMITS AND CLOSINGS	MISC CUSTOM	30
SANTA ROSA SPRINGS 1/3	D R HORTON/EXPRESS	25
RANCHO CABRILLO A/B	D R HORTON	24



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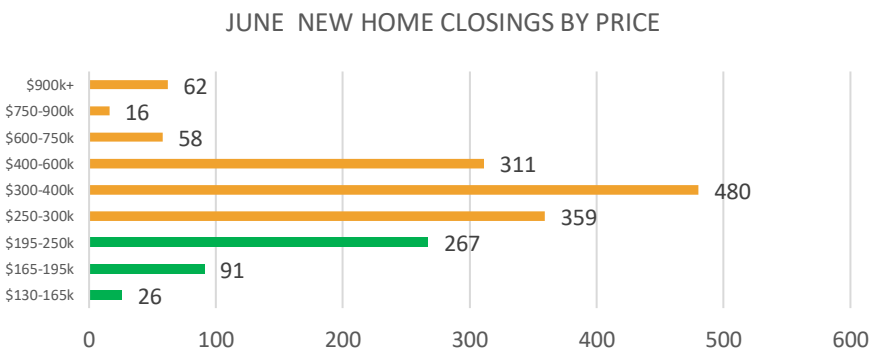
THE PARKS A/B	MERITAGE HOMES	23
16924 SABINAS	MISC CUSTOM	22
FESTIVAL FOOTHILLS 1,2/SKYLINE	PULTE HOMES	20
ADORA TRAILS 13/11B/9 50X115/DISCOVERY II	TAYLOR MORRISON	20
SUN CITY FESTIVAL	PULTE HOMES/DEL WEBB	20
COOLEY STATION 10-17 PHASE 1/2 CENTRAL VERMONT	FULTON HOMES	19
ADORA TRAILS 5/8,11A PASSAGE	TAYLOR MORRISON	18
COPPER BASIN 5B/5C1/5C2	D R HORTON/EXPRESS	18
MERIDIAN/HOMESTEAD/CHURCH FARMS A1,A2	WILLIAM LYON HOMES	17
WICKENBURG RANCH TRILOGY	SHEA HOMES	16
CUSTOM - C - BULK PERMITS AND CLOSINGS	MISC CUSTOM	16
EASTMARK/ENCORE 9.2,9.1,9.5,9.4,9.6	AV HOMES	16
CUSTOM - NW* (MC) - BULK PERMITS AND CLOSINGS	MISC CUSTOM	16
ADORA TRAILS 2B,D,13,14/SUMMIT	TAYLOR MORRISON	16
MERRILL RCH/ANTHEM/PARKSIDE/CACTUS-CANYON	PULTE HOMES	16
TIERRA DEL SOL/TRAILSIDE AT HAPPY VALLEY RANCH PHASE I	PULTE HOMES	15
ALBANY VILLAGE	WILLIAM LYON HOMES	15

(This data was developed from Volume 392 of Magic Pro using the Absorption Data Set.)

The complete table of community-level permit and closing activity for the entire Metro Phoenix area is included as a part of *Magic Pro* and a part of our monthly *Sales and Permit Report*, available in either electronic format (.xls) or in print form. Builder and community/subdivision rankings can also be made available to you as stand alone documents. Call 480-614-0211 for information.

June new home sales by price range...

Using our transaction-level escrow closing data we are able to give an accurate characterization of the distribution of new home sales activity by price range.



While we have seen some significant movement toward affordability in new homes over the last several months, in June the \$300,000-\$400,000 price bracket remains dominant, followed by closing activity in the \$195,000-\$250,000 bracket.

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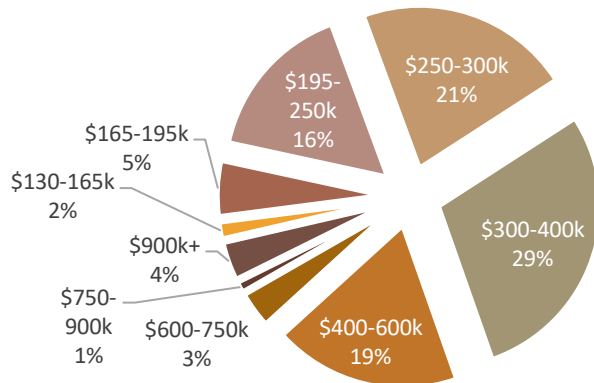
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JUNE NEW HOME PRICE SHARE



29% of June’s new home escrow closings were in the \$300,000-\$400,000 range while 21% of the closings were in the \$250,000-\$300,000 range.

16% of the June closings were in the \$195,000-\$250,000 price bracket and a total of 23% of June’s home sales were priced under \$250,000, which is a range that most would consider to be “affordable housing” in today’s new housing marketplace.

In July 2016 there were 102 new home sales priced under \$250,000 and this June there were 384 such sales.

Perspective.....

It is obvious from what we presented in this market letter that this housing market remains strong and vibrant with a substantial opportunity for the new home side of the housing market here in Phoenix to continue to regain market share vs. the resale market place.

It remains to be seen if we can return to those heady days when new home sales accounted for 30-35% of the total housing activity in the region and where do we stand today?

The changes that we anticipate will occur in the market in the near and midterms can be positive changes for builders, contractors, and suppliers that plan ahead and adapt to the changes we expect to occur.

We have already seen some dramatic shifting in product positioning propelling builder performance and geographic land acquisition shifts as well as subtle but significant changes in marketing strategies by a number of homebuilders that has allowed them to increase their market penetration. It is also entirely possible that we can anticipate dramatic changes in the marketing of new homes to occur in the Phoenix area over the next several years as builder move away from the “traditional” new-home marketing techniques.

What can you expect from our mid-year forecast another ho hum, I have heard that before presentation? If you have taken advantage of one of these live web-cast presentations by Greg and I before, you already know that it won’t be a recitation of national housing numbers or a conversation about Texas or California.



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It will be a 45 minute fast-moving and fact filled presentation of precisely what is going on in this Phoenix housing market, who the market leaders are, what the geographic and price segmentation of the market over the last six months is, where today's and tomorrow's housing hotspots will be, who is buying what land and where, and what we expect to impact this marketplace over the next five years.

We will focus on what we see as the beginnings of shifts in the who, where, and what in the Phoenix housing market so that you can stay ahead in your planning and execution and not be caught short by changes you did not anticipate or prepare for.

The quality of the presentation and of the forecast itself is the stuff of legends. We have been forecasting this housing market for the last 30+ years with unparalleled accuracy, using both the most comprehensive and accurate market data and our own hands-on housing experience.

The format of the presentation is specifically designed to make it easy for you to attend. No travel, no parking, no chicken lunch or cold breakfast, no wasted time. One ticket allows you to pack your conference room with your associates, clients, or your investors.

That ticket also gets you a copy of the PowerPoint presentation and a transcript of the presentation which you can share with your peers and your home office, investors and others.

Tickets must be purchased at www.RLBrownreports.com, before the presentation. No tickets will be available on the day of the presentation.

We will see you on July 27 at 10 AM in your conference room or on your laptop or smart phone wherever you might be.

*In the meantime, if you rely on market intelligence to make smart decisions on product positioning, land acquisition, or prospecting for builders for your product or services, **you need our housing market data.***

*Nothing else compares to the timeliness, breadth, or accuracy of the market information that we create and completely update every month for every community and every product offering. **Let us come to your office, and make a direct comparison** with our data products vs. whatever current source you are using. Call us at 480-614-0211 today so that you can take advantage of the best this market has to offer.*

We publish housing market data for Phoenix and the Denver-front Range area of Colorado, for Tucson through Bright Future, and in Las Vegas through Homebuilders Research.

Have a great day!

RL Brown and Greg Burger

*Magic Pro is now available for **the Denver-Front Range area of Colorado** ... with the same features, comprehensive data, and analysis tools that are available to Phoenix housing professionals. Call us at 480-614-0211 to access this state-of-the-art market intelligence tool.*



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- Market-wide Data Summary – Last three months Permits/New Home Closings/New Home Permits/Resales/and Median and Average Prices including a New Home Closings Heat Map – A two page report in .pdf [DSMetro] \$75

- 1-3 Mile Custom Radius Competitive Market Area Profile of the area of your choice, including map – Showing active builders, 12 month permits, coe, prices, sq ftg and more by active community – A 3 page report [AW3] - \$100/mile radius

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