

92009 CARLSBAD

North County San Diego Real Estate Market Update - April 2026

FIRST PRINCIPLES REAL ESTATE

\$1.899M

MEDIAN SALE PRICE
Detached · Mar 2026

\$860K

ATTACHED MEDIAN
Condos/TH · Mar 2026

Up

CLOSED SALES YOY
Both types · CRMLS Mar 2026

Comp.

DAYS ON MARKET
Competitive · Well-priced homes move fast

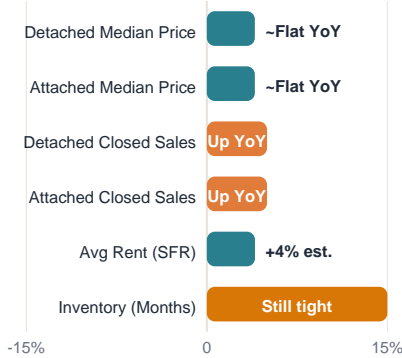
Strong

AVIARA SIGNAL
Premium demand above ZIP avg

\$3,800+

AVG RENT
SFR est. · Apr 2026

YEAR-OVER-YEAR COMPARISON



NEIGHBORHOOD SPOTLIGHTS

AVIARA

Premium demand signal · Above ZIP median

Consistently commands a price premium above the 92009 median. Turnkey homes drawing serious buyer attention. Broad ZIP averages undervalue what Aviara actually

BRESSI RANCH

Thin public inventory · Live MLS comps essential

Public inventory is limited, making portal estimates unreliable. The neighborhood holds its value consistently. Buyers and sellers both need fresh MLS comps before

LA COSTA

Broader ZIP story · Family-friendly hillside community

La Costa reflects the broader 92009 market: selective buyers, resilient prices. Well-priced and move-in-ready homes still move. Overpriced or underprepared listings are

RENTAL MARKET

SFR - \$3,800-4,200/mo · Attached - \$2,800-3,200/mo

Rental demand solid across 92009. Carlsbad rents run ~20% above Oceanside. Tight inventory keeps lease rates elevated — strong signal for investor-owned properties.

FOR BUYERS

- More inventory than pandemic peak — but this is not a soft market
- Turnkey homes in Aviara and Bressi Ranch still move quickly
- Get pre-approved and know your neighborhoods before you look
- ZIP averages won't tell you what Aviara or La Costa actually do
- Waiting for a deal in 92009 is usually a losing strategy.

FOR SELLERS

- Pricing discipline matters more now than at the peak.
- Buyers have portal access to every comp — price accordingly
- Homes sitting are overpriced or underprepared. Full stop.
- Aviara and Bressi Ranch need neighborhood-specific pricing
- Presentation and positioning are the difference in speed.

KEY METRICS - MARCH 2026

Metric	Detached	Attached
Median Sale Price	\$1,899,000	\$860,000
Closed Sales YoY	Up	Up
Days on Market	Competitive	Moving fast
Inventory	Limited	Limited
Avg Rent Est.	\$3,800-4,200/mo	\$2,800-3,200/mo