

WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

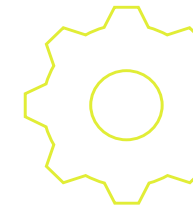
CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

WAAR Market Indicators Report



Key Market Trends: June 2025

- › **Sales activity picked up in the WAAR market in June.** There were 376 in June in the WAAR region, increasing by 16.8%, which is 54 more sales than last year. All local markets saw sales climb this month. There was double digit growth in James City County with 20 additional home sales (+13.5%) and York County with 13 more sales than the year before (+12.6%).
- › **Pending sales jumped in the WAAR area this month.** Regionwide, there were 297 pending sales in June, 45 more than a year earlier, climbing 17.9%. The local markets with the sharpest gains in pending sales were New Kent County, with 26 more than the year before (+83.9%) and James City County with 22 additional pending sales (+16.8%). York County had four fewer pending sales than the previous year (-5.5%).
- › **Median sales price up sharply in the WAAR compared to last June.** The median price of a home in the region was \$461,750 in June, 6.7% higher than a year ago, a \$29,000 price gain. Home prices surged in Charles City County with the median price jumping \$102,250 more than the year prior (+39.3%). York County (+14.5%) and James City County (+9.6%) also experienced strong median price growth this month. Williamsburg was the only market in the WAAR footprint to experience a decline in median price (-12.8%).
- › **An increase in active listings led to more supply on the market this month.** June ended with 917 listings in the WAAR region, 375 more listings than a year ago, a 69.2% jump in activity. Most of the listing growth occurred in James City County with 226 more listings than last year (+103.7%) and York County with an additional 88 listings (+56.8%).



WAAR Market Dashboard

YoY Chg	Jun-25	Indicator
▲ 16.8%	376	Sales
▲ 17.9%	297	Pending Sales
▲ 23.1%	431	New Listings
▲ 10.1%	\$517,992	Average List Price
▲ 7.3%	\$509,070	Average Sales Price
▲ 6.7%	\$461,750	Median Sales Price
▲ 2.6%	\$219	Average Price Per Square Foot
▲ 25.3%	\$191.4	Sold Dollar Volume (in millions)
▼ -1.1%	99.9%	Average Sold/Ask Price Ratio
▲ 22.6%	29	Average Days on Market
▲ 112.5%	17	Median Days on Market
▲ 69.2%	917	Active Listings
▲ 73.5%	3.5	Months of Supply

INTEREST RATE TRACKER



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Consumers Should Consult with a REALTOR®.

Buying or selling real estate, for a majority of consumers, is one of the most important decisions they will make. Choosing a real estate professional continues to be a vital part of this process.

Identify a Professional to Manage the Procedure.

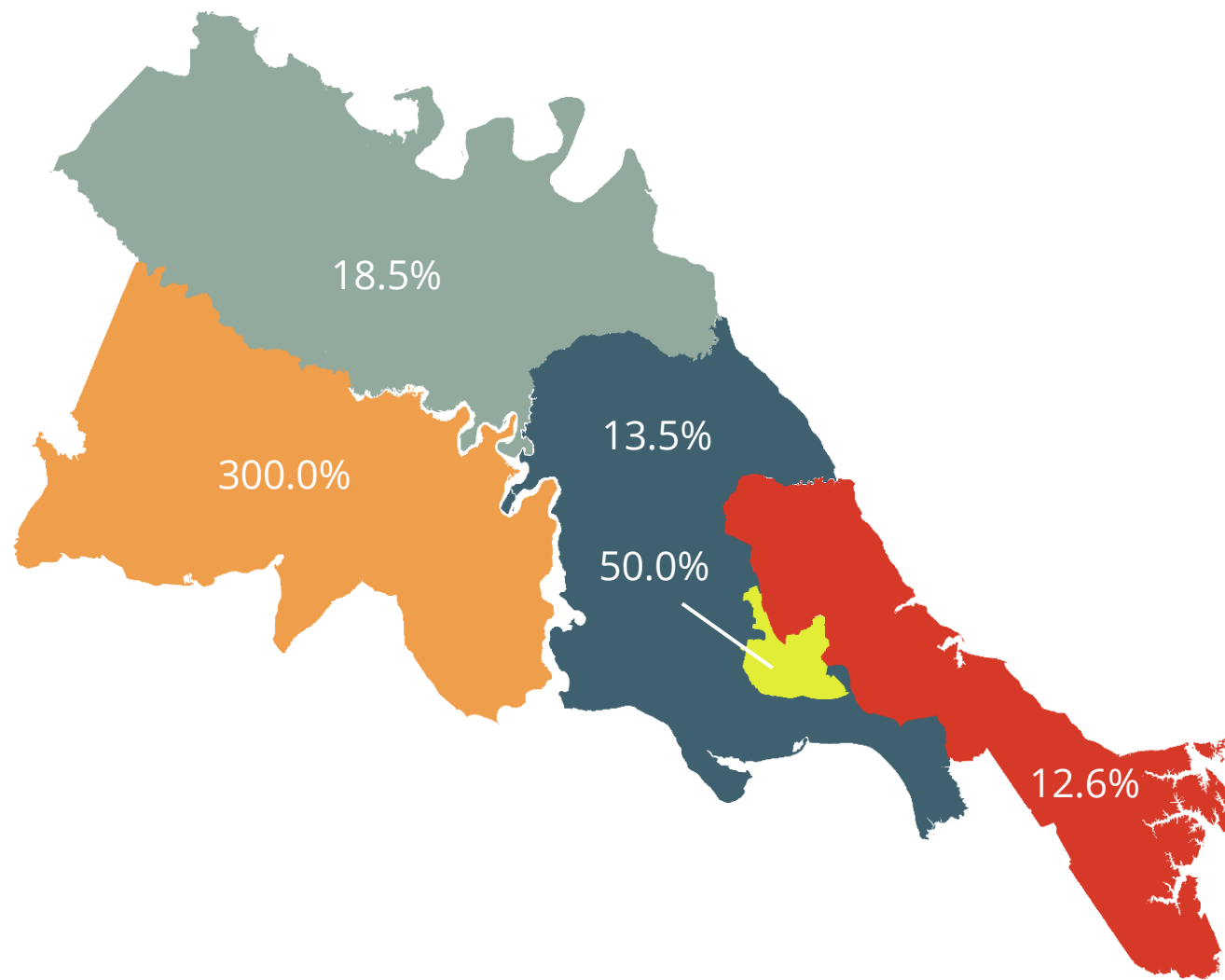
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



Jurisdiction	Total Sales		
	Jun-24	Jun-25	% Chg
Charles City County	1	4	300.0%
James City County	148	168	13.5%
New Kent County	54	64	18.5%
Williamsburg	16	24	50.0%
York County	103	116	12.6%
WAAR	322	376	16.8%

Total Market Overview



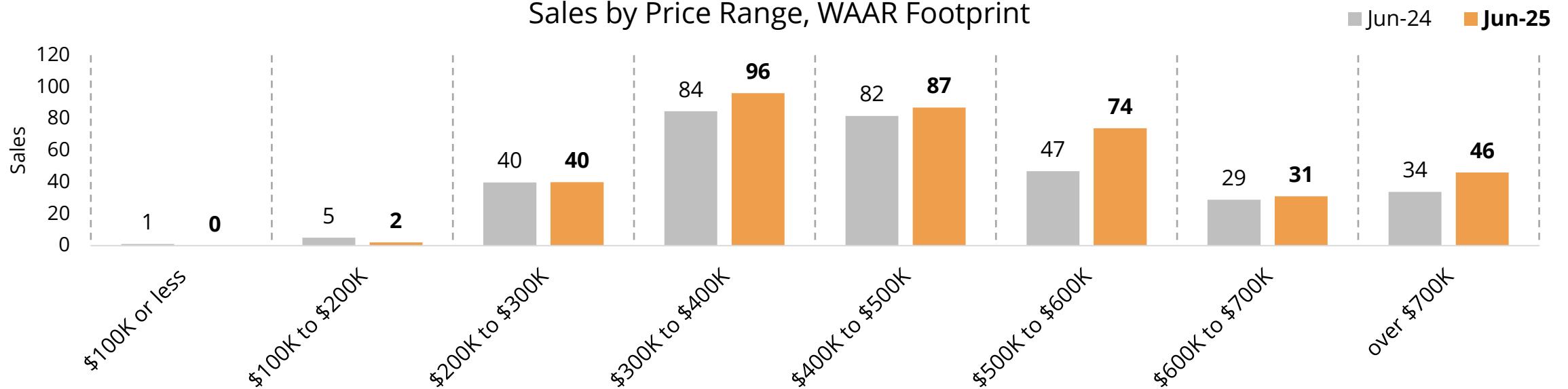
Key Metrics	2-year Trends	Jun-24	Jun-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Jun-23						
Sales		322	376	16.8%	1,589	1,543	-2.9%
Pending Sales		252	297	17.9%	1,509	1,487	-1.5%
New Listings		350	431	23.1%	1,946	2,383	22.5%
Average List Price		\$470,582	\$517,992	10.1%	\$474,200	\$496,594	4.7%
Average Sales Price		\$474,229	\$509,070	7.3%	\$475,308	\$493,767	3.9%
Median Sales Price		\$432,750	\$461,750	6.7%	\$425,000	\$450,000	5.9%
Average Price Per Square Foot		\$214	\$219	2.6%	\$210	\$218	4.1%
Sold Dollar Volume (in millions)		\$152.7	\$191.4	25.3%	\$756.1	\$760.2	0.5%
Average Sold/Ask Price Ratio		101.0%	99.9%	-1.1%	100.5%	99.8%	-0.6%
Average Days on Market		24	29	22.6%	31	32	1.9%
Median Days on Market		8	17	112.5%	10	14	40.0%
Active Listings		542	917	69.2%	n/a	n/a	n/a
Months of Supply		2.0	3.5	73.5%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed July 15, 2025

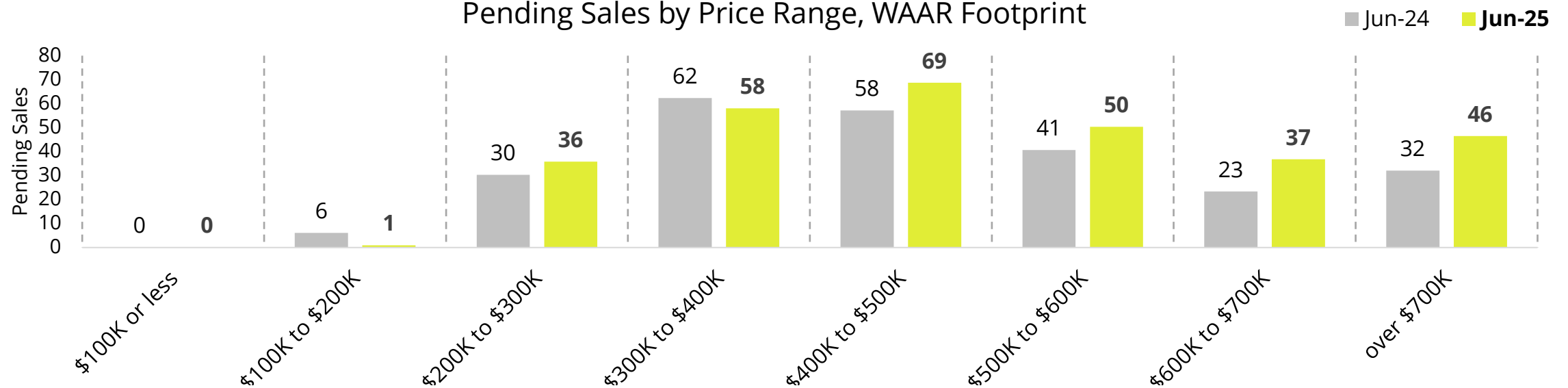
Total Market by Price Range Overview



Sales by Price Range, WAAR Footprint



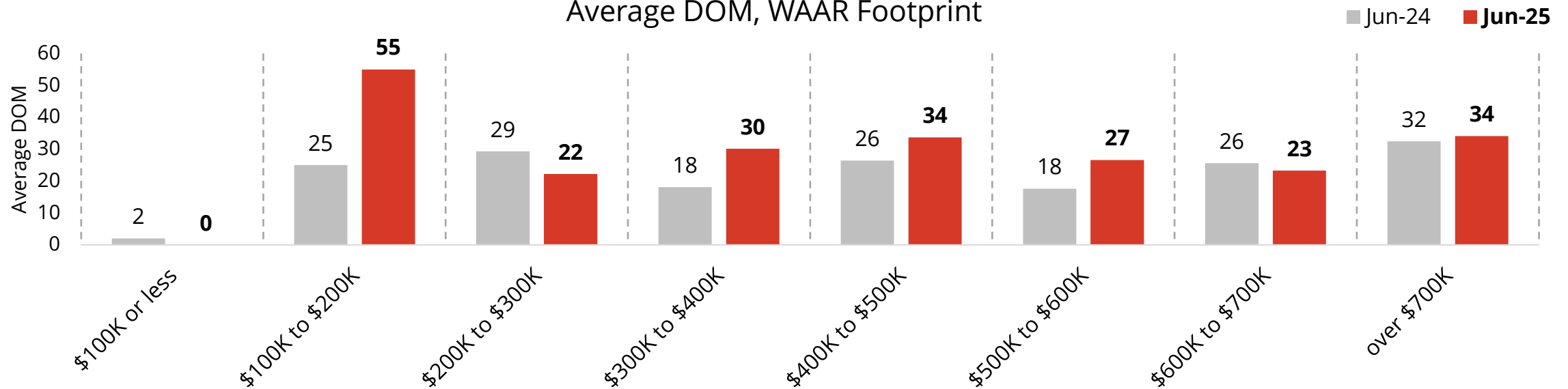
Pending Sales by Price Range, WAAR Footprint



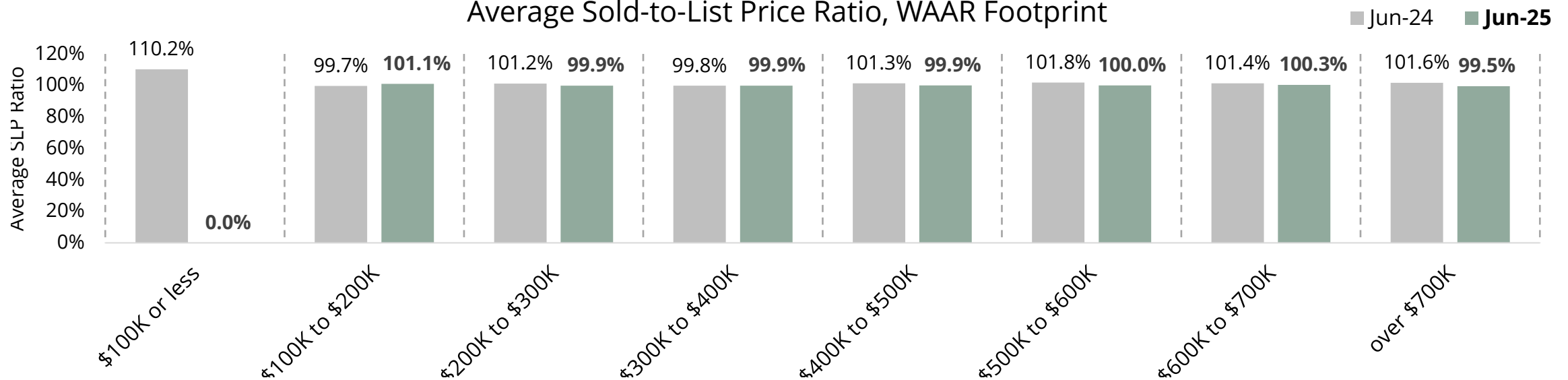
Total Market by Price Range Overview



Average DOM, WAAR Footprint



Average Sold-to-List Price Ratio, WAAR Footprint



Single-Family Detached Market Overview



Key Metrics	2-year Trends	Jun-24	Jun-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Jun-23						
Sales		261	305	16.9%	1,289	1,259	-2.3%
Pending Sales		210	252	20.0%	1,292	1,253	-3.0%
New Listings		296	360	21.6%	1,632	1,974	21.0%
Average List Price		\$498,123	\$555,413	11.5%	\$504,320	\$530,973	5.3%
Average Sales Price		\$502,804	\$545,072	8.4%	\$505,687	\$528,061	4.4%
Median Sales Price		\$465,000	\$499,999	7.5%	\$453,500	\$480,000	5.8%
Average Price Per Square Foot		\$214	\$219	2.4%	\$212	\$220	4.0%
Sold Dollar Volume (in millions)		\$131.2	\$166.2	26.7%	\$652.2	\$663.1	1.7%
Average Sold/Ask Price Ratio		101.2%	100.0%	-1.2%	100.5%	100.0%	-0.5%
Average Days on Market		23	29	29.1%	32	32	0.4%
Median Days on Market		8	17	112.5%	9	13	44.4%
Active Listings		464	740	59.5%	n/a	n/a	n/a
Months of Supply		2.1	3.4	62.0%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed July 15, 2025

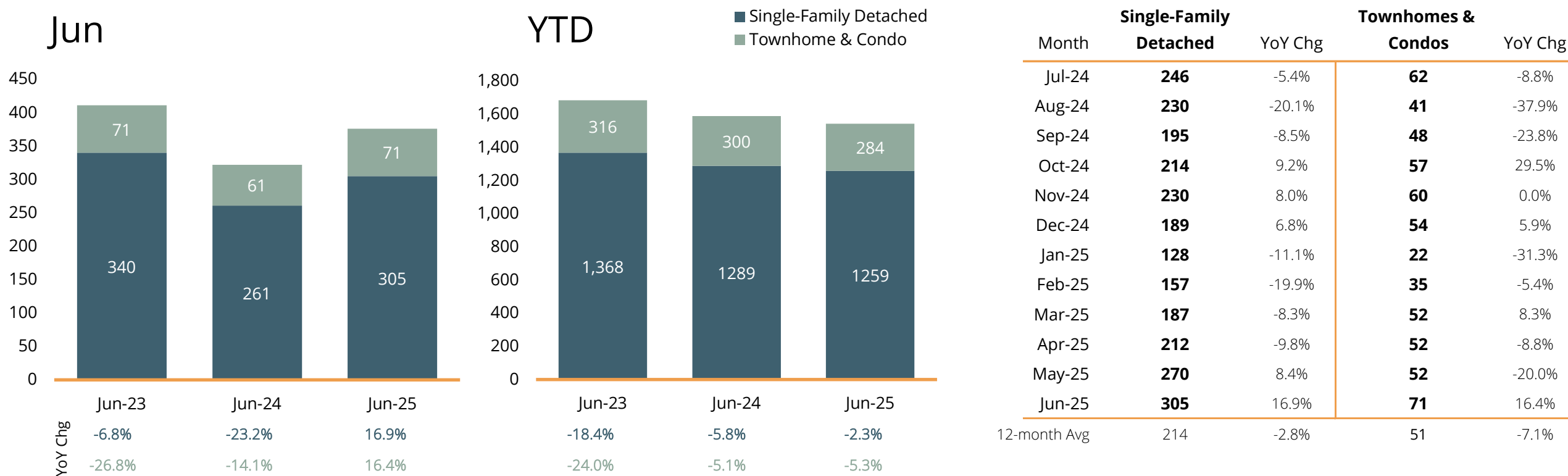
Townhome & Condo Market Overview



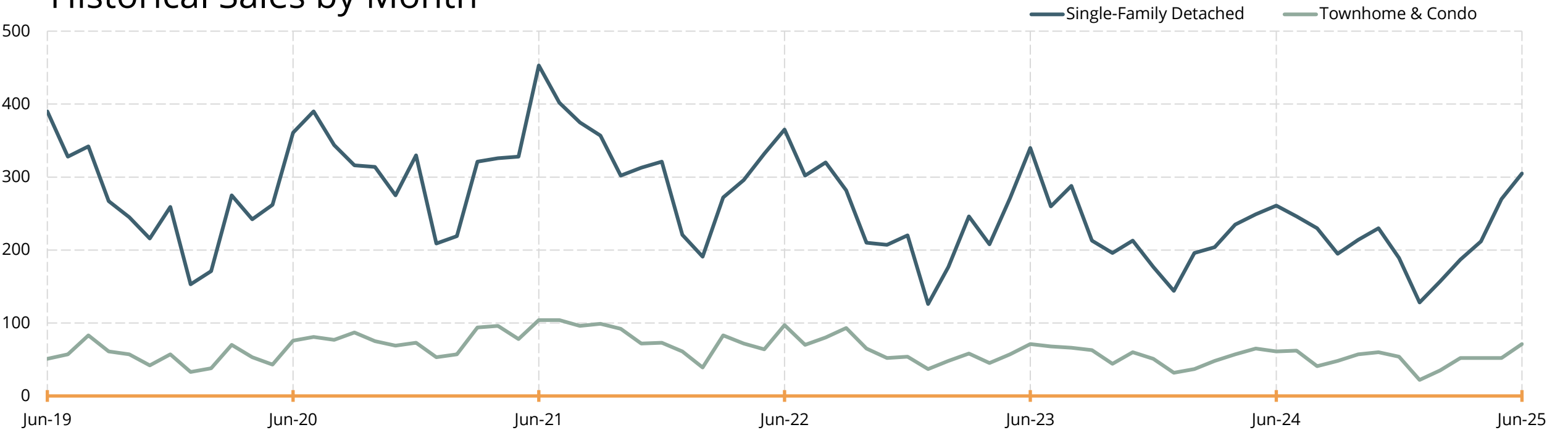
Key Metrics	2-year Trends	Jun-24	Jun-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Jun-23		Jun-25				
Sales		61	71	16.4%	300	284	-5.3%
Pending Sales		42	45	7.1%	217	234	7.8%
New Listings		54	71	31.5%	314	409	30.3%
Average List Price		\$352,744	\$344,370	-2.4%	\$346,621	\$344,002	-0.8%
Average Sales Price		\$351,963	\$354,415	0.7%	\$346,632	\$341,548	-1.5%
Median Sales Price		\$355,000	\$345,000	-2.8%	\$340,000	\$330,000	-2.9%
Average Price Per Square Foot		\$210	\$220	4.8%	\$194	\$204	5.0%
Sold Dollar Volume (in millions)		\$21.5	\$25.2	17.2%	\$103.9	\$97.1	-6.6%
Average Sold/Ask Price Ratio		99.9%	99.3%	-0.7%	100.2%	99.2%	-1.0%
Average Days on Market		30	30	1.3%	29	31	8.8%
Median Days on Market		11	17	54.5%	13	17	30.8%
Active Listings		78	177	126.9%	n/a	n/a	n/a
Months of Supply		1.4	3.5	142.5%	n/a	n/a	n/a

Source: Virginia REALTORS®, data accessed July 15, 2025

Sales

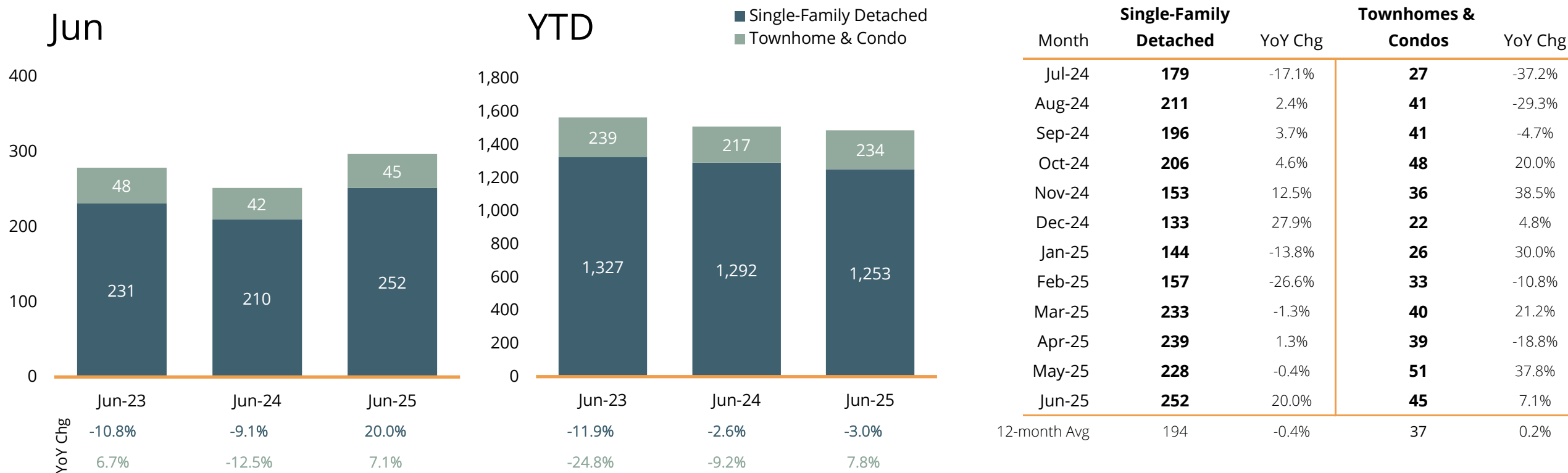


Historical Sales by Month

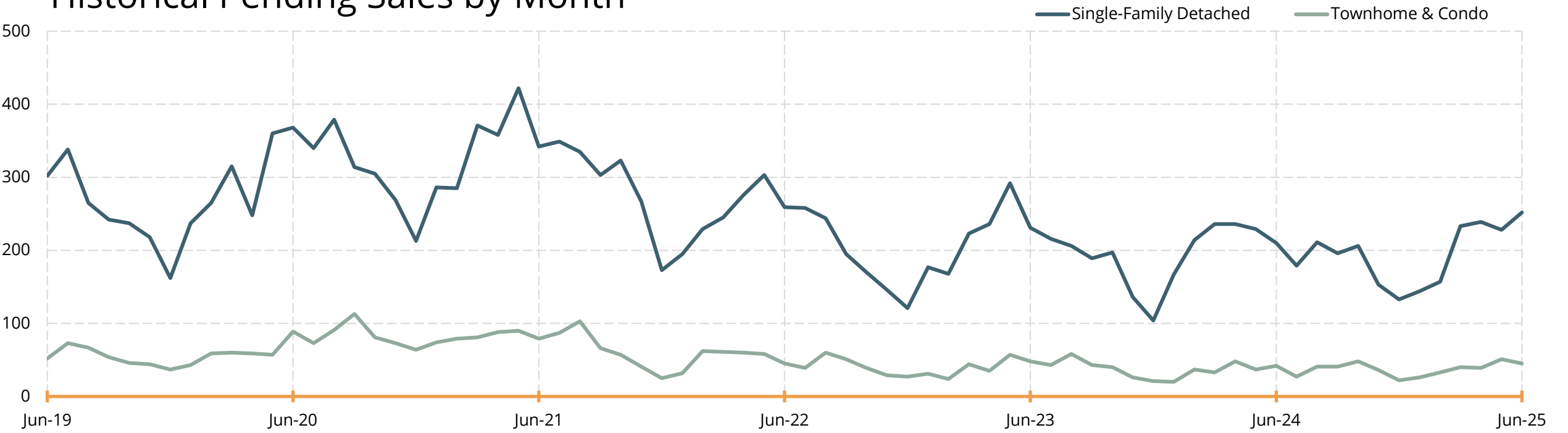


Source: Virginia REALTORS®, data accessed July 15, 2025

Pending Sales

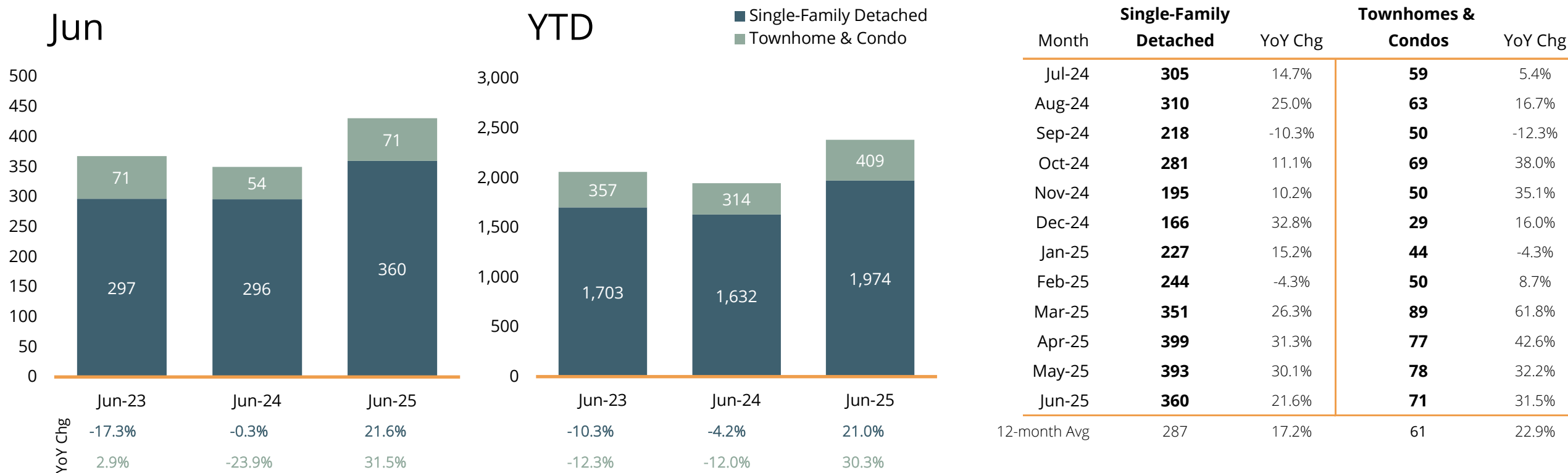


Historical Pending Sales by Month

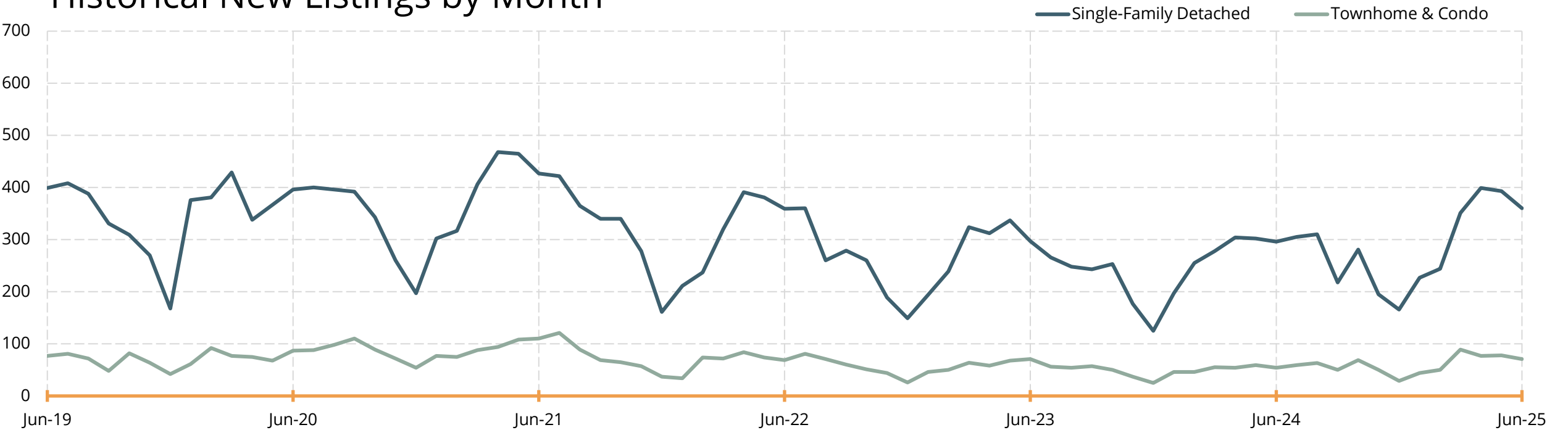


Source: Virginia REALTORS®, data accessed July 15, 2025

New Listings

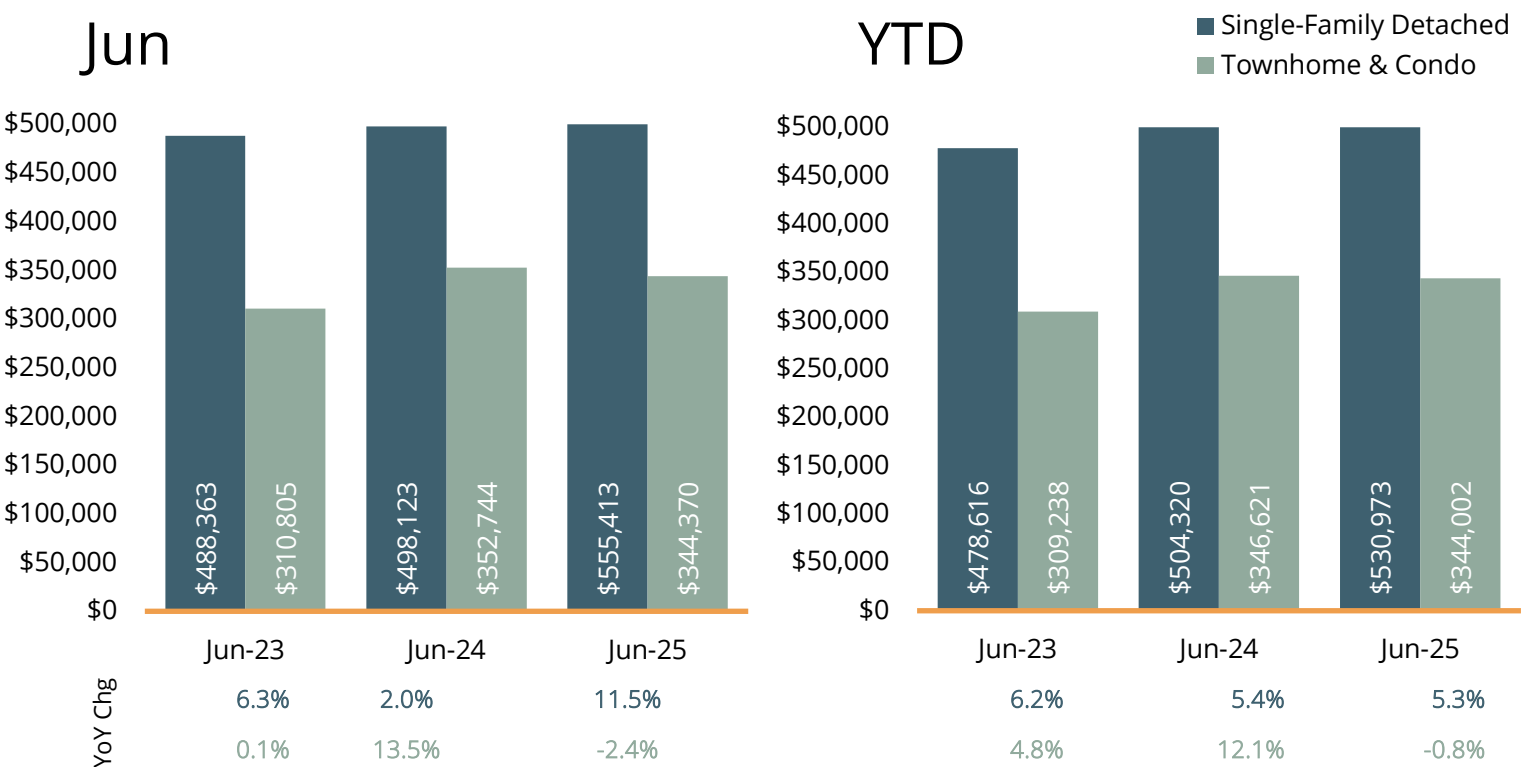


Historical New Listings by Month

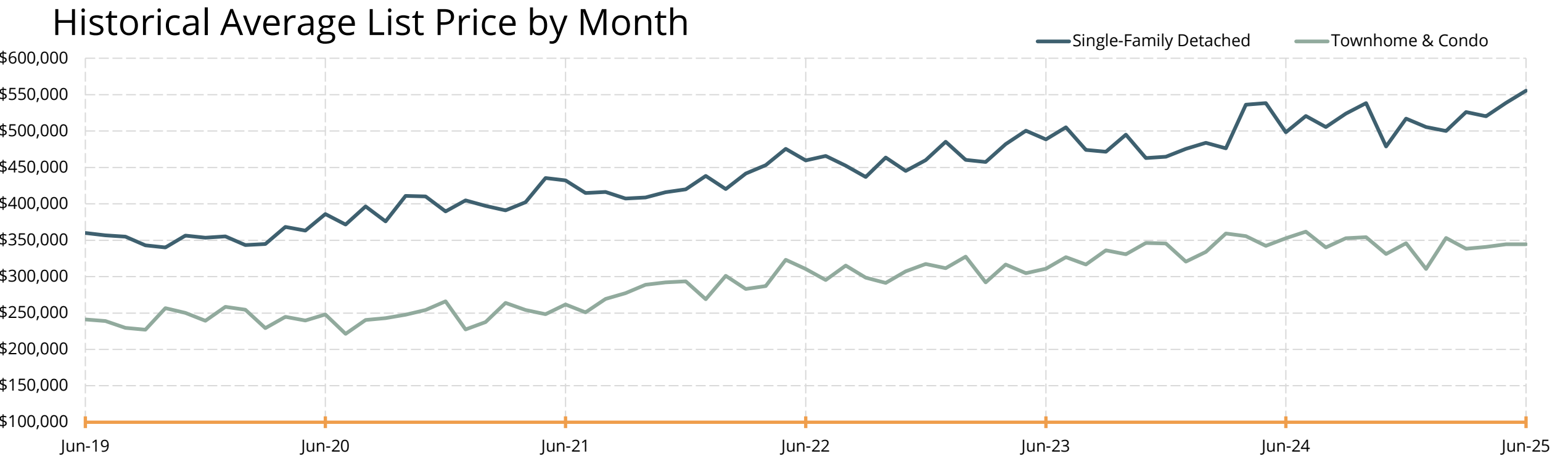


Source: Virginia REALTORS®, data accessed July 15, 2025

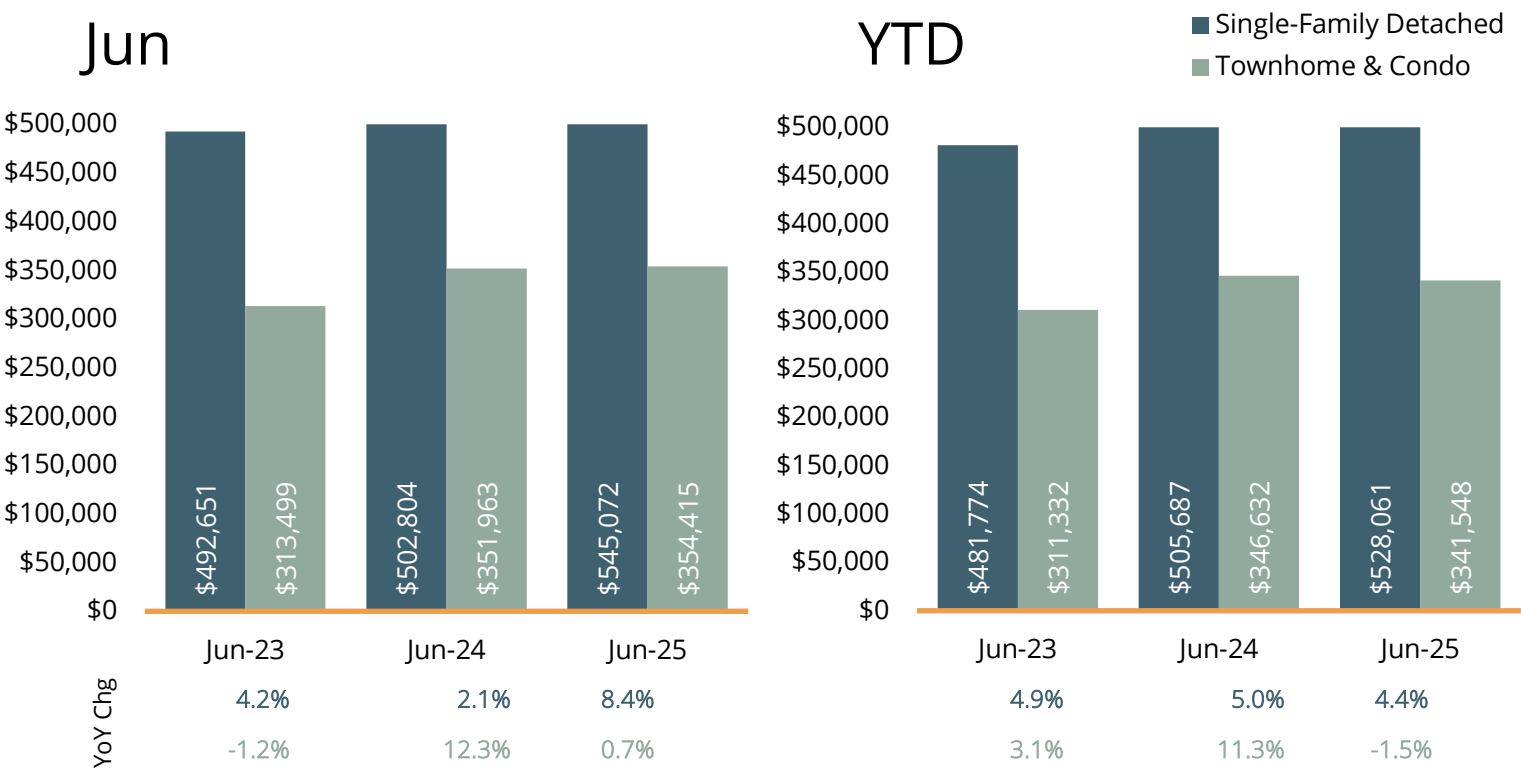
Average List Price



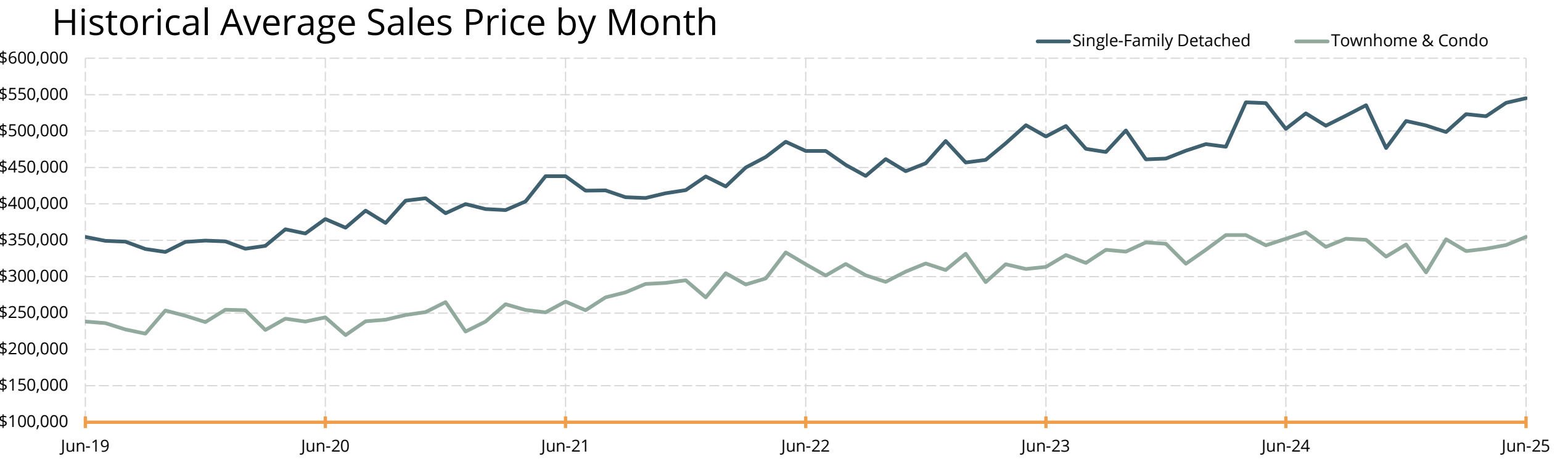
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-24	\$520,740	3.1%	\$361,792	10.7%
Aug-24	\$505,617	6.7%	\$340,261	7.5%
Sep-24	\$524,036	11.1%	\$352,775	5.0%
Oct-24	\$538,396	8.7%	\$354,253	7.1%
Nov-24	\$478,749	3.4%	\$330,960	-4.5%
Dec-24	\$517,213	11.3%	\$345,729	0.1%
Jan-25	\$505,325	6.3%	\$310,386	-3.2%
Feb-25	\$500,148	3.4%	\$353,290	5.8%
Mar-25	\$526,176	10.5%	\$338,260	-5.8%
Apr-25	\$520,424	-2.9%	\$340,790	-4.2%
May-25	\$538,745	0.1%	\$344,370	0.6%
Jun-25	\$555,413	11.5%	\$344,370	-2.4%
12-month Avg	\$519,249	5.9%	\$343,103	1.2%



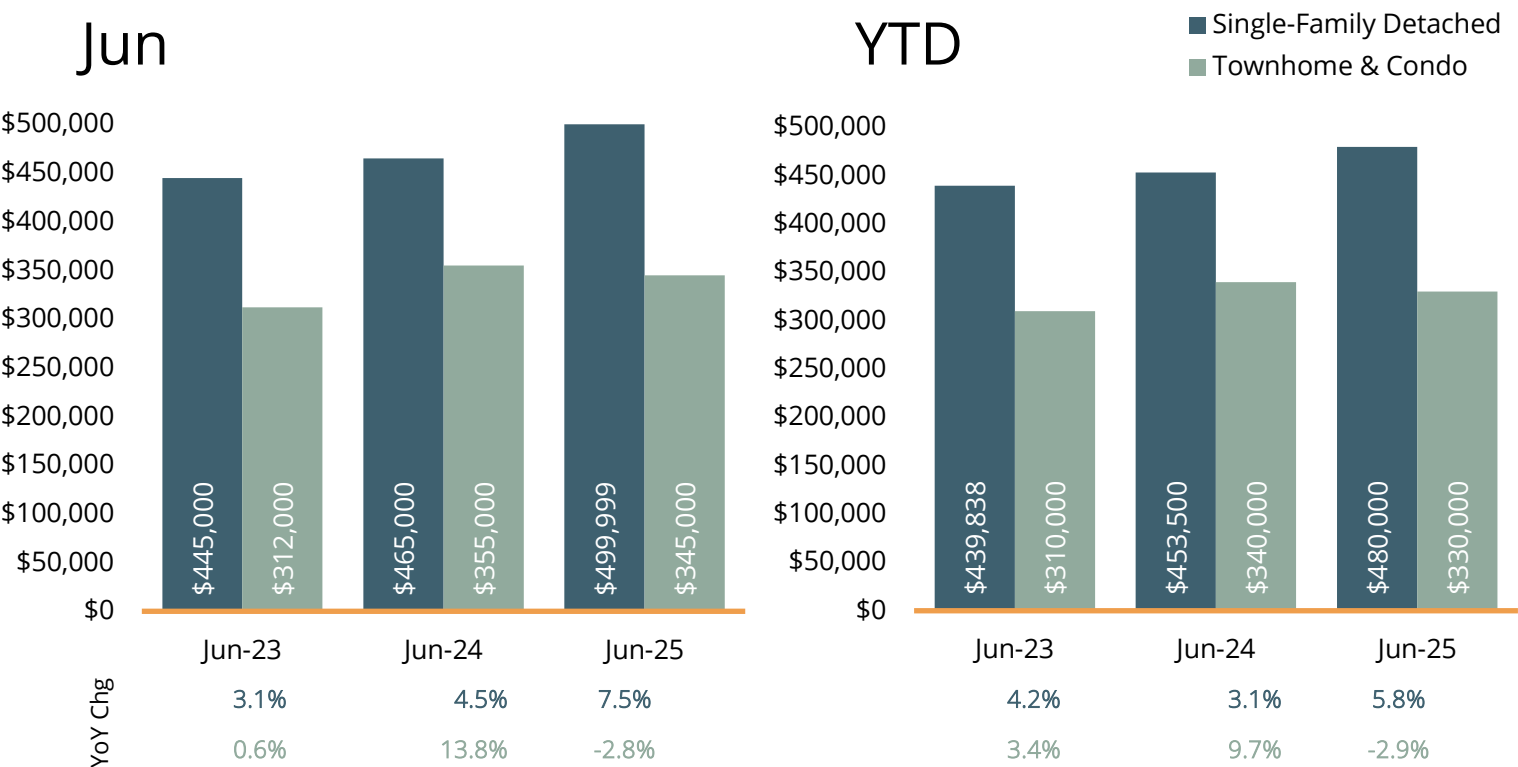
Average Sales Price



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-24	\$524,216	3.4%	\$361,068	9.5%
Aug-24	\$507,370	6.7%	\$340,874	6.9%
Sep-24	\$521,135	10.6%	\$351,917	4.5%
Oct-24	\$535,509	6.9%	\$350,642	4.9%
Nov-24	\$476,542	3.4%	\$327,502	-5.7%
Dec-24	\$513,758	11.2%	\$344,229	-0.3%
Jan-25	\$507,786	7.3%	\$305,920	-3.7%
Feb-25	\$498,522	3.4%	\$351,316	4.3%
Mar-25	\$523,236	9.4%	\$335,184	-6.2%
Apr-25	\$520,217	-3.5%	\$338,200	-5.3%
May-25	\$538,884	0.1%	\$343,527	0.2%
Jun-25	\$545,072	8.4%	\$354,415	0.7%
12-month Avg	\$517,687	5.4%	\$342,066	0.7%

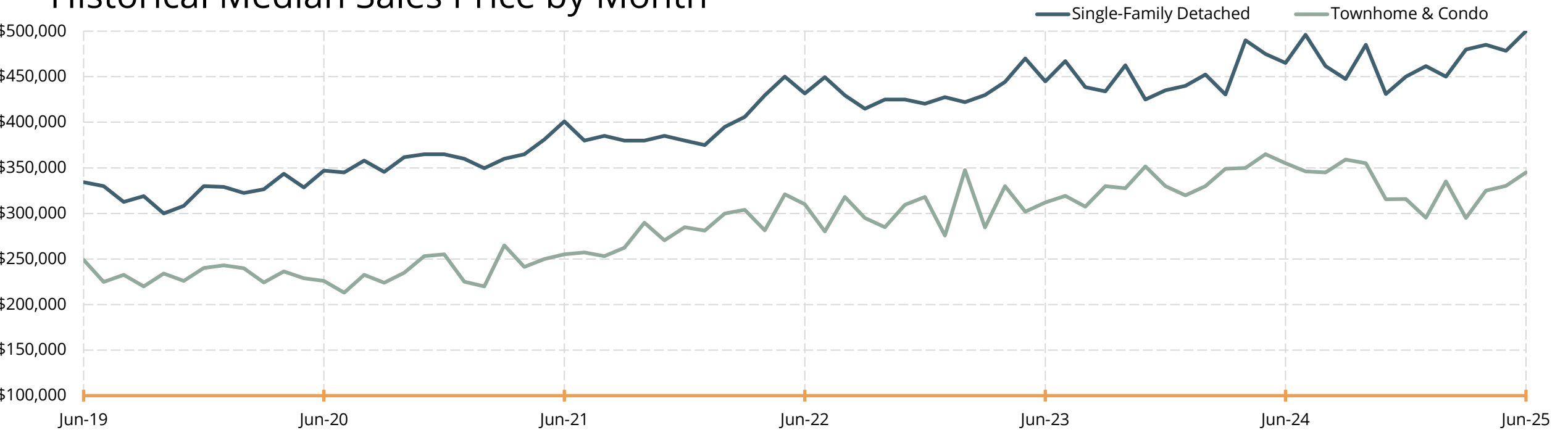


Median Sales Price



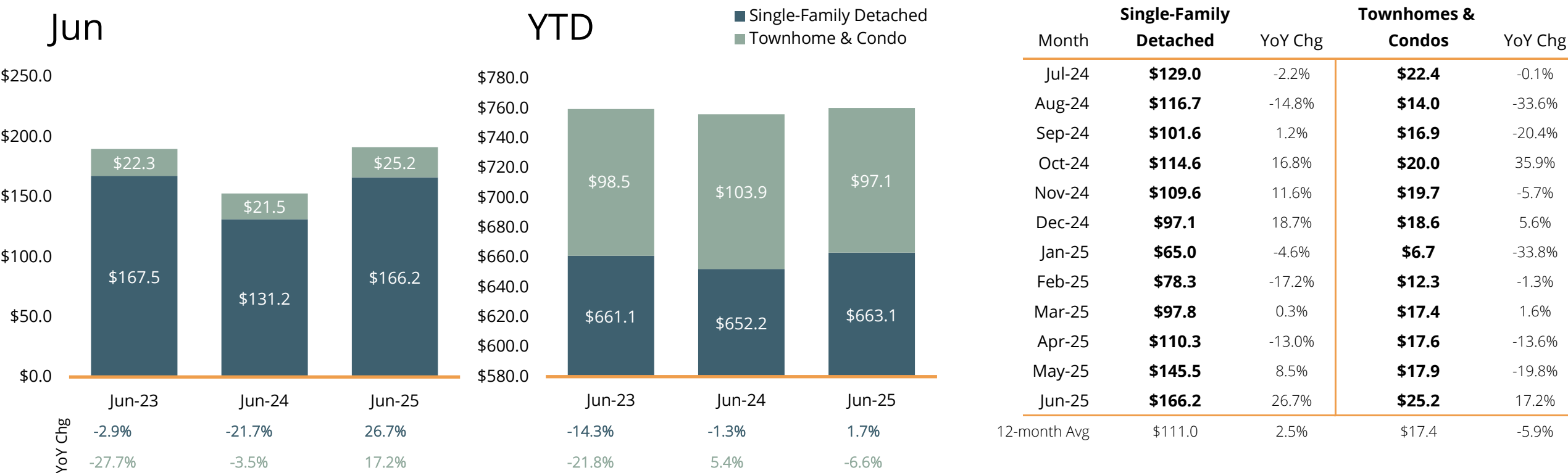
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-24	\$496,000	6.2%	\$346,000	8.3%
Aug-24	\$461,801	5.3%	\$345,000	12.2%
Sep-24	\$447,450	3.1%	\$359,000	8.8%
Oct-24	\$485,000	4.9%	\$355,000	8.4%
Nov-24	\$431,000	1.4%	\$315,500	-10.2%
Dec-24	\$450,000	3.4%	\$315,894	-4.3%
Jan-25	\$461,723	4.9%	\$295,147	-7.8%
Feb-25	\$450,000	-0.6%	\$335,000	1.5%
Mar-25	\$480,000	11.5%	\$294,995	-15.5%
Apr-25	\$485,100	-1.0%	\$325,000	-7.1%
May-25	\$478,495	0.7%	\$330,250	-9.5%
Jun-25	\$499,999	7.5%	\$345,000	-2.8%
12-month Avg	\$468,881	3.9%	\$330,149	-1.8%

Historical Median Sales Price by Month

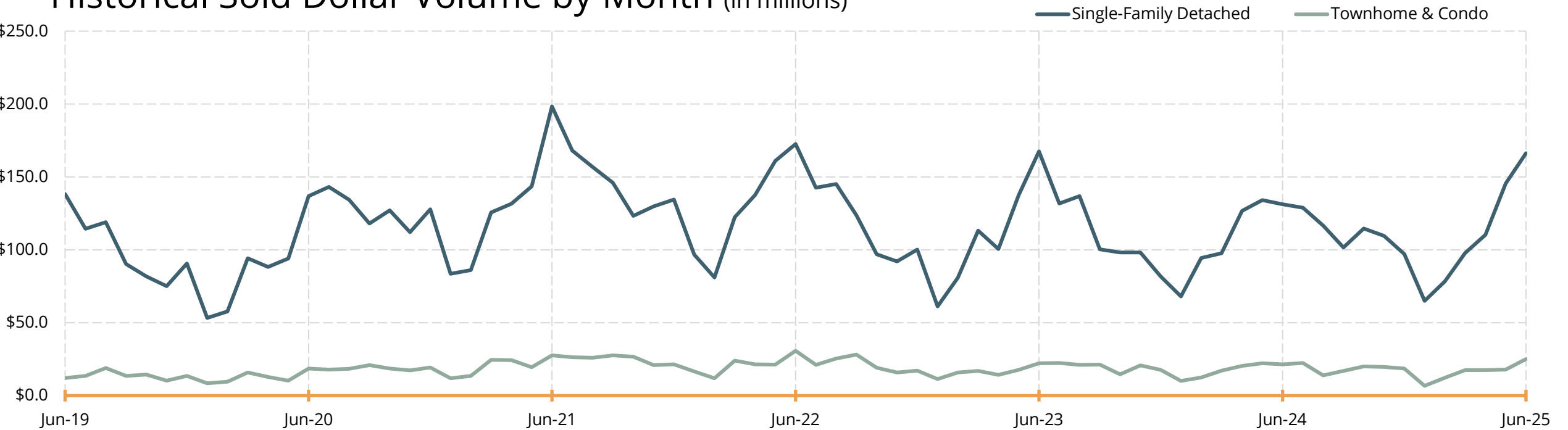


Source: Virginia REALTORS®, data accessed July 15, 2025

Sold Dollar Volume (in millions)

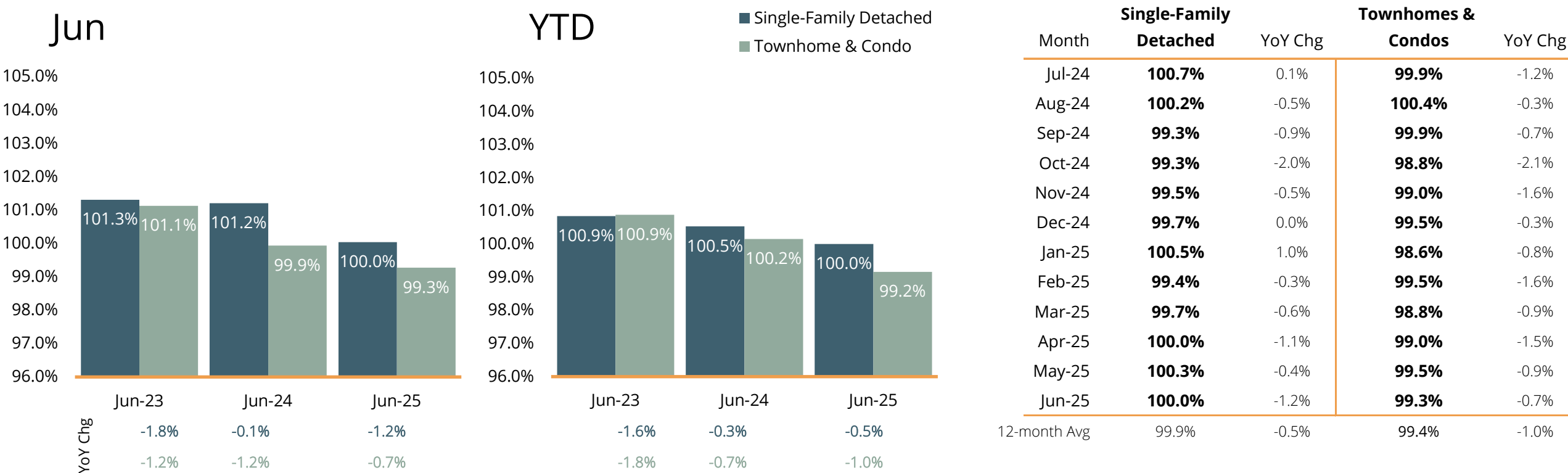


Historical Sold Dollar Volume by Month (in millions)

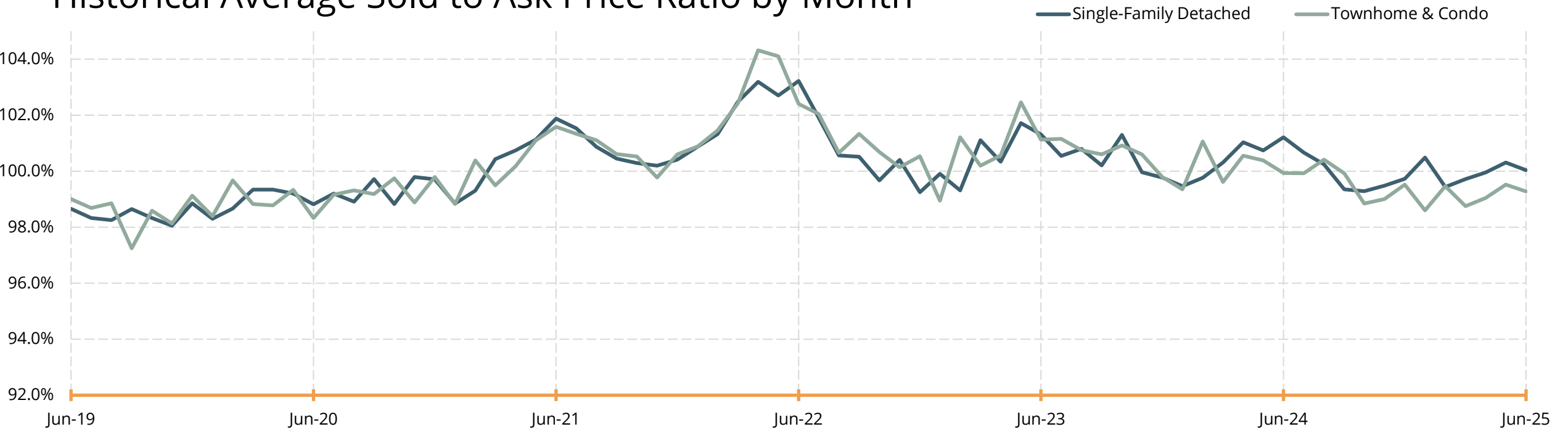


Source: Virginia REALTORS®, data accessed July 15, 2025

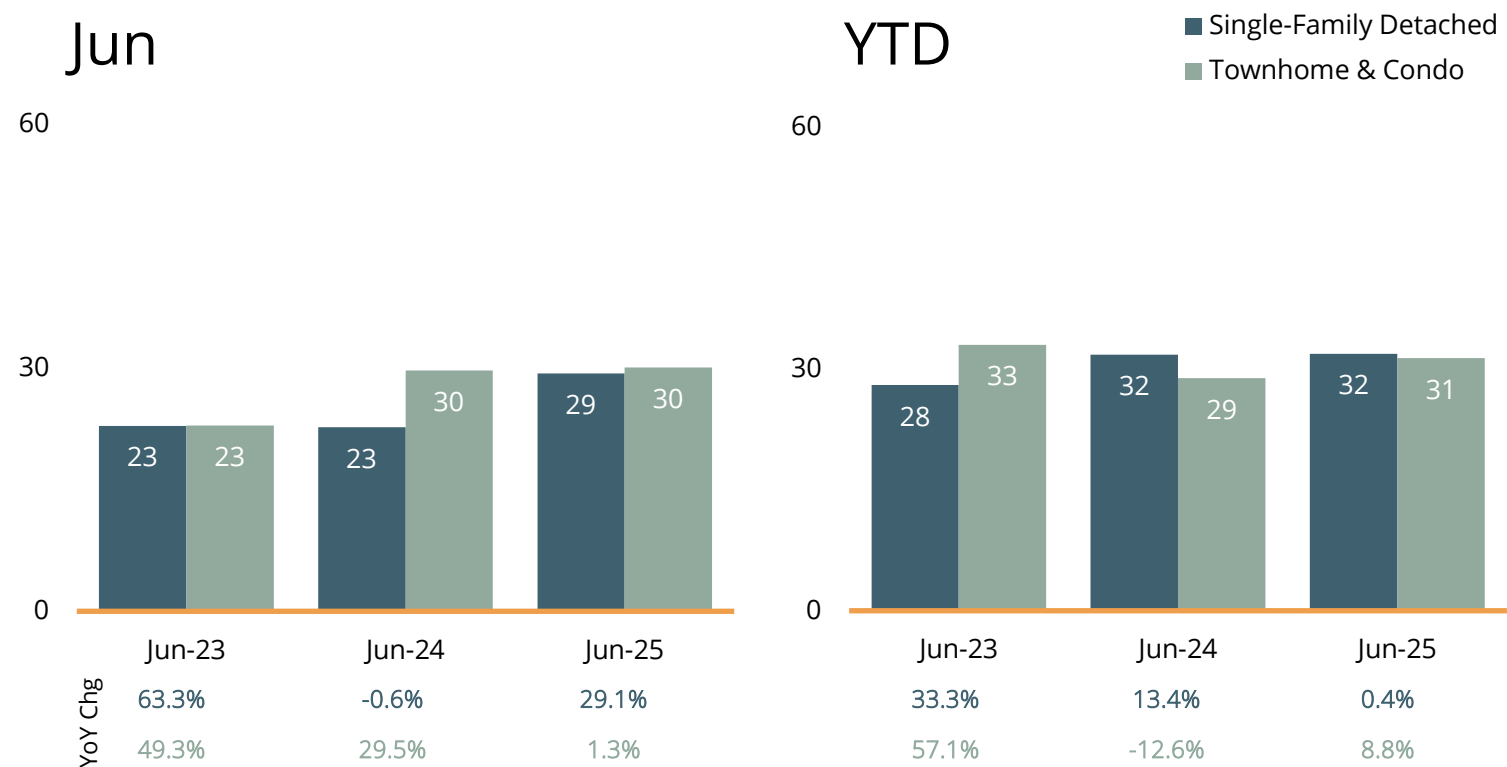
Average Sold to Ask Price Ratio



Historical Average Sold to Ask Price Ratio by Month

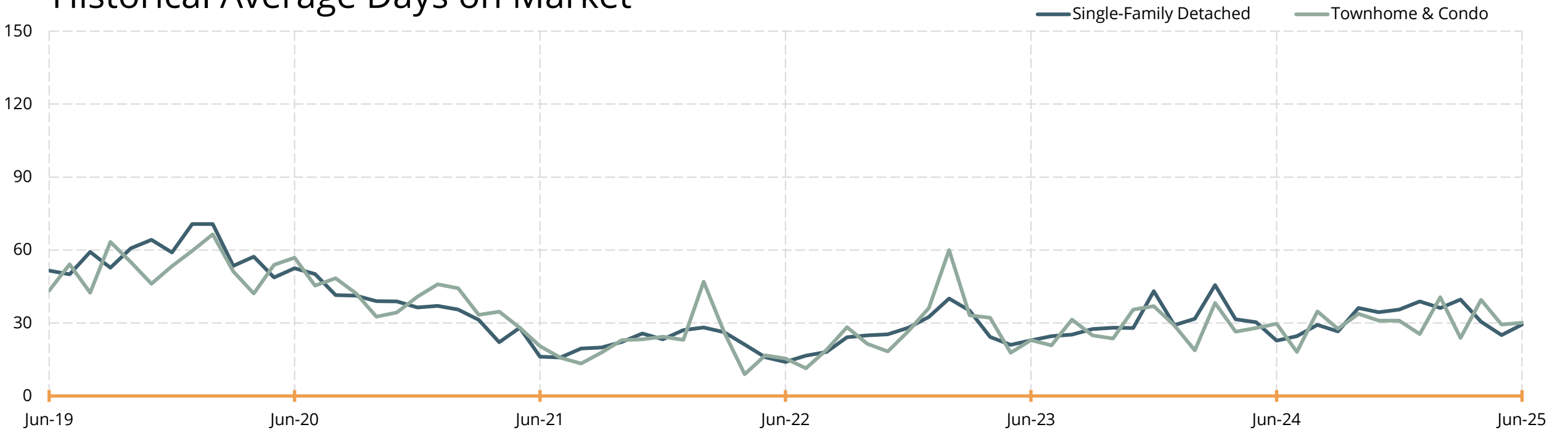


Average Days on Market



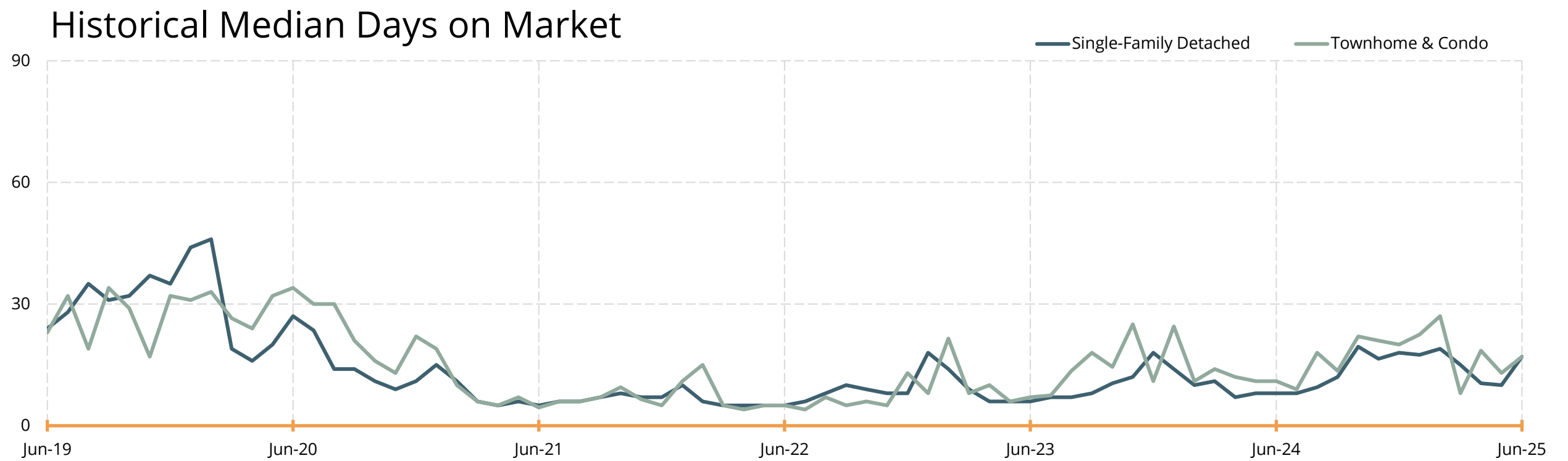
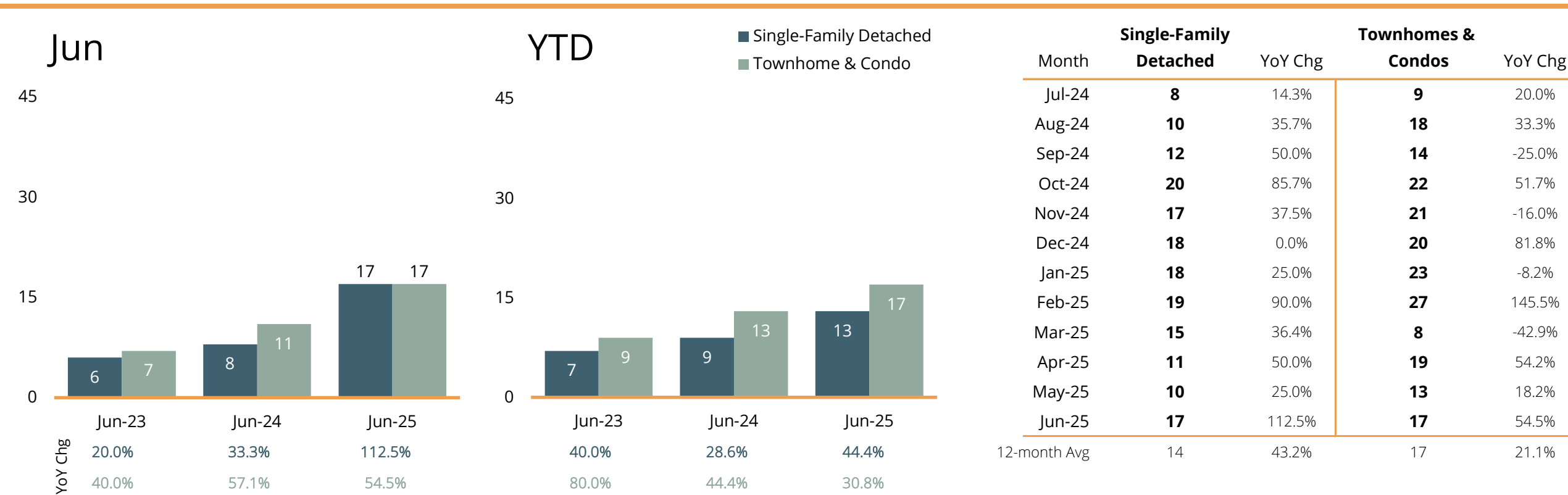
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-24	25	-0.1%	18	-13.1%
Aug-24	29	16.1%	35	10.5%
Sep-24	27	-3.7%	28	10.9%
Oct-24	36	28.9%	34	43.2%
Nov-24	34	23.2%	31	-12.6%
Dec-24	35	-17.6%	31	-16.2%
Jan-25	39	33.4%	26	-12.1%
Feb-25	36	14.0%	41	117.1%
Mar-25	40	-13.0%	24	-37.7%
Apr-25	30	-3.1%	40	49.5%
May-25	25	-17.5%	29	5.0%
Jun-25	29	29.1%	30	1.3%
12-month Avg	32	5.1%	30	6.4%

Historical Average Days on Market

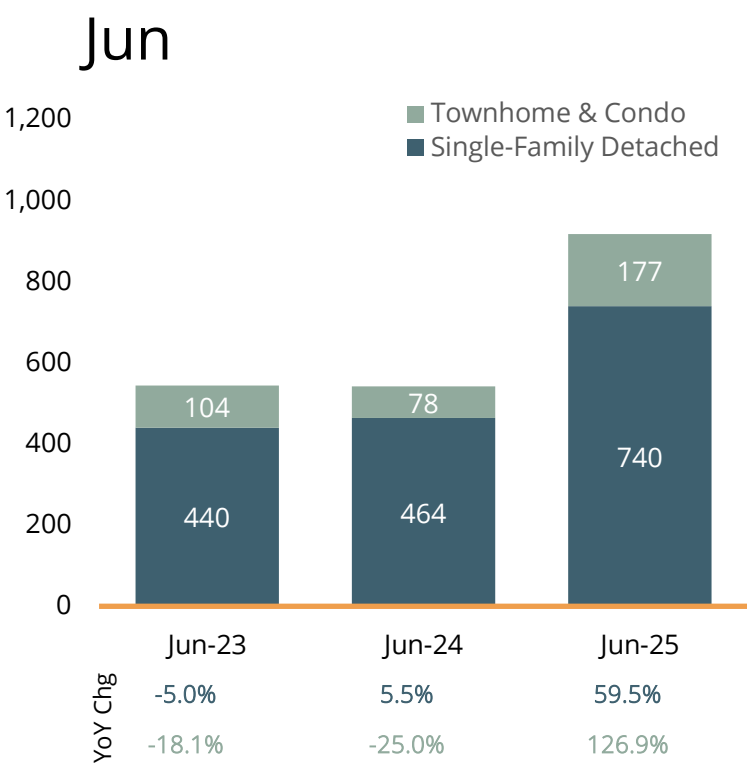


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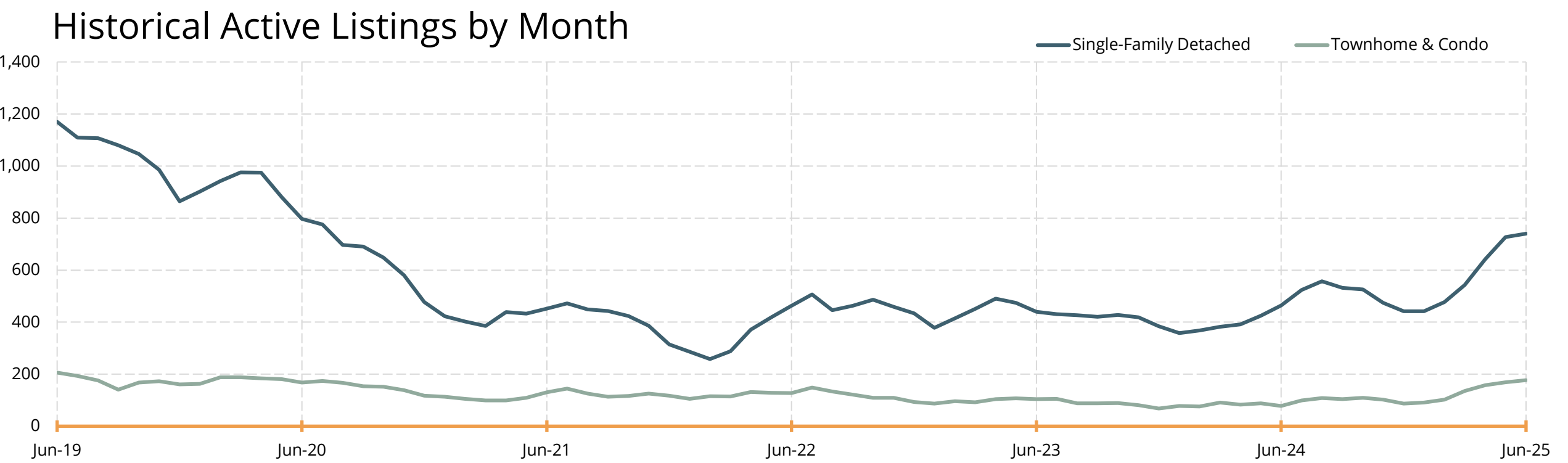
Median Days on Market



Active Listings



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-24	524	21.6%	99	-5.7%
Aug-24	557	30.4%	108	22.7%
Sep-24	532	26.4%	104	18.2%
Oct-24	526	22.9%	109	22.5%
Nov-24	474	13.1%	102	25.9%
Dec-24	442	15.1%	87	27.9%
Jan-25	442	23.5%	91	16.7%
Feb-25	477	29.6%	102	34.2%
Mar-25	543	42.1%	135	48.4%
Apr-25	642	64.2%	158	90.4%
May-25	727	71.1%	169	92.0%
Jun-25	740	59.5%	177	126.9%
12-month Avg	552	35.3%	120	42.3%

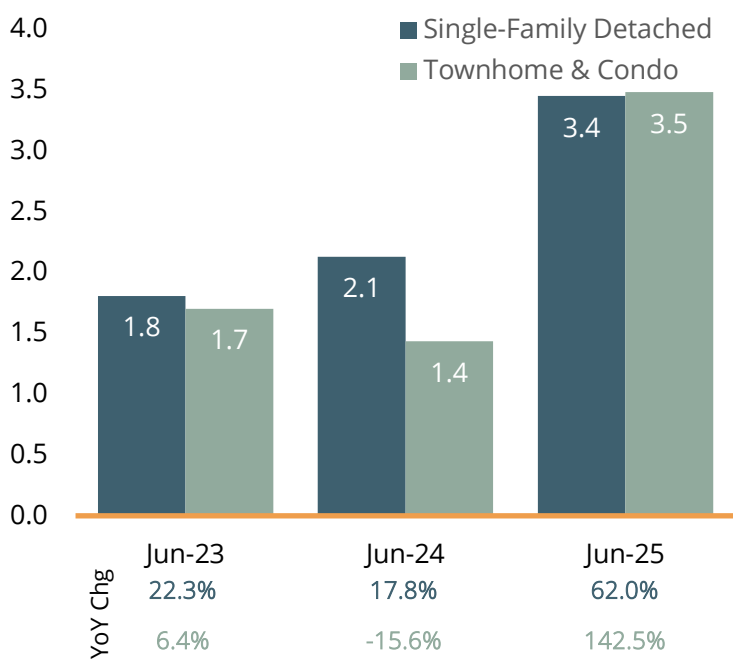


Source: Virginia REALTORS®, data accessed July 15, 2025

Months of Supply

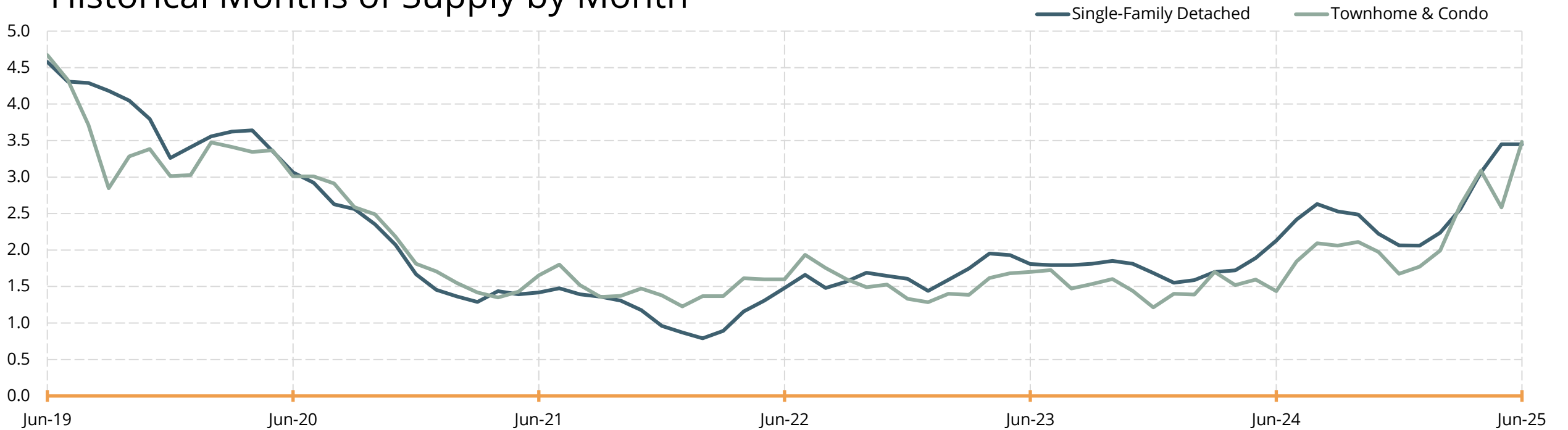


Jun



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jul-24	2.4	34.9%	1.8	7.0%
Aug-24	2.6	46.5%	2.1	42.2%
Sep-24	2.5	39.5%	2.1	34.2%
Oct-24	2.5	34.2%	2.1	32.0%
Nov-24	2.2	22.7%	2.0	37.1%
Dec-24	2.1	22.3%	1.7	38.0%
Jan-25	2.1	32.6%	1.8	26.5%
Feb-25	2.2	41.0%	2.0	43.6%
Mar-25	2.6	50.9%	2.6	54.1%
Apr-25	3.1	77.8%	3.1	103.1%
May-25	3.4	82.5%	2.6	62.1%
Jun-25	3.4	62.0%	3.5	142.5%
12-month Avg	2.6	46.1%	2.3	51.4%

Historical Months of Supply by Month



Source: Virginia REALTORS®, data accessed July 15, 2025

Area Overview - Total Market



New Listings				Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
Geography	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg
James City County	163	207	27.0%	148	168	13.5%	\$493,189	\$555,132	12.6%	\$442,500	\$485,000	9.6%	218	444	103.7%	1.8	3.6	105.7%
Williamsburg	24	24	0.0%	16	24	50.0%	\$513,528	\$405,975	-20.9%	\$432,495	\$377,000	-12.8%	40	70	75.0%	1.8	4.1	122.0%
York County	103	128	24.3%	103	116	12.6%	\$452,595	\$482,840	6.7%	\$417,000	\$477,500	14.5%	155	243	56.8%	1.9	3.1	56.8%
New Kent County	55	66	20.0%	54	64	18.5%	\$455,850	\$481,266	5.6%	\$425,541	\$448,450	5.4%	123	152	23.6%	2.8	3.7	30.1%
Charles City County	5	6	20.0%	1	4	300.0%	\$260,000	\$398,613	53.3%	\$260,000	\$362,250	39.3%	6	8	33.3%	1.8	1.8	-1.2%

Area Overview - Total Market YTD



New Listings YTD				Sales YTD			Average Sales Price TYD			Median Sales Price TYD			Active Listings YTD		
Geography	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg
James City County	934	1,171	25.4%	753	712	-5.4%	\$505,145	\$518,547	2.7%	\$440,000	\$464,975	5.7%	218	444	103.7%
Williamsburg	134	159	18.7%	103	94	-8.7%	\$461,074	\$443,886	-3.7%	\$415,000	\$392,495	-5.4%	40	70	75.0%
York County	527	610	15.7%	476	467	-1.9%	\$445,027	\$480,725	8.0%	\$413,450	\$451,475	9.2%	155	243	56.8%
New Kent County	317	412	30.0%	232	247	6.5%	\$473,187	\$467,548	-1.2%	\$427,640	\$433,750	1.4%	123	152	23.6%
Charles City County	34	31	-8.8%	25	23	-8.0%	\$323,442	\$474,850	46.8%	\$280,000	\$349,900	25.0%	6	8	33.3%

Area Overview - Single Family Detached Market



	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
Geography	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg
James City County	137	166	21.2%	120	133	10.8%	\$526,331	\$601,940	14.4%	\$480,500	\$535,000	11.3%	184	337	83.2%	1.9	3.5	86.8%
Williamsburg	15	14	-6.7%	12	16	33.3%	\$575,703	\$437,031	-24.1%	\$464,975	\$425,000	-8.6%	27	40	48.1%	1.9	3.8	98.3%
York County	86	112	30.2%	78	94	20.5%	\$481,983	\$519,575	7.8%	\$489,500	\$523,283	6.9%	131	214	63.4%	2.1	3.3	56.1%
New Kent County	53	62	17.0%	50	58	16.0%	\$466,181	\$495,897	6.4%	\$432,500	\$465,495	7.6%	116	141	21.6%	3.0	3.8	27.9%
Charles City County	5	6	20.0%	1	4	300.0%	\$260,000	\$398,613	53.3%	\$260,000	\$362,250	39.3%	6	8	33.3%	1.8	1.8	-1.2%

Area Overview - Single Family Detached Market YTD



New Listings YTD				Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg
James City County	780	941	20.6%	606	565	-6.8%	\$542,709	\$560,889	3.3%	\$477,500	\$519,900	8.9%	184	337	83.2%
Williamsburg	94	105	11.7%	70	64	-8.6%	\$516,676	\$501,334	-3.0%	\$465,000	\$434,000	-6.7%	27	40	48.1%
York County	435	516	18.6%	374	386	3.2%	\$473,634	\$513,020	8.3%	\$445,125	\$485,000	9.0%	131	214	63.4%
New Kent County	289	381	31.8%	214	221	3.3%	\$487,219	\$483,574	-0.7%	\$440,000	\$457,450	4.0%	116	141	21.6%
Charles City County	34	31	-8.8%	25	23	-8.0%	\$323,442	\$474,850	46.8%	\$280,000	\$349,900	25.0%	6	8	33.3%

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg
James City County	26	41	57.7%	28	35	25.0%	\$351,154	\$377,263	7.4%	\$338,500	\$365,000	7.8%	34	107	214.7%	1.4	4.2	206.6%
Williamsburg	9	10	11.1%	4	8	100.0%	\$327,000	\$343,863	5.2%	\$342,500	\$325,000	-5.1%	13	30	130.8%	1.7	4.6	166.3%
York County	17	16	-5.9%	25	22	-12.0%	\$360,906	\$325,882	-9.7%	\$394,665	\$318,000	-19.4%	24	29	20.8%	1.4	2.0	45.7%
New Kent County	2	4	100.0%	4	6	50.0%	\$326,700	\$339,827	4.0%	\$326,873	\$339,290	3.8%	7	11	57.1%	1.5	2.5	66.0%
Charles City County	0	0	n/a	0	0	n/a	\$0	\$0	n/a	\$0	\$0	n/a	0	0	n/a	0.0	0.0	n/a

Area Overview - Townhome & Condo Market YTD



New Listings YTD				Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg	Jun-24	Jun-25	% chg
James City County	154	230	49.4%	147	147	0.0%	\$354,630	\$356,044	0.4%	\$345,000	\$356,945	3.5%	34	107	214.7%
Williamsburg	40	54	35.0%	33	30	-9.1%	\$348,183	\$321,330	-7.7%	\$360,000	\$306,500	-14.9%	13	30	130.8%
York County	92	94	2.2%	102	81	-20.6%	\$341,258	\$326,029	-4.5%	\$345,525	\$317,500	-8.1%	24	29	20.8%
New Kent County	28	31	10.7%	18	26	44.4%	\$310,254	\$330,707	6.6%	\$312,348	\$329,363	5.4%	7	11	57.1%
Charles City County	0	0	n/a	0	0	n/a	\$0	\$0	n/a	\$0	\$0	n/a	0	0	n/a



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