

WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

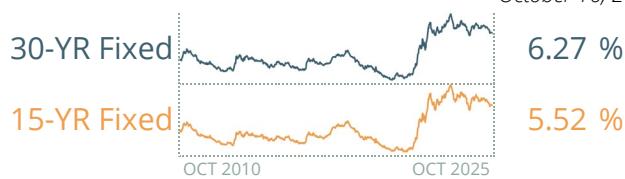
WAAR Market Indicators Report



Key Market Trends: September 2025

- There was double-digit growth in sales activity this month. The WAAR area saw a 19.3% increase in sales bringing the total to 290 in September, 47 more sales than a year ago. Two markets with the sharpest jump in sales were James City County with 27 additional closed sales (+25.5%) and York County with 11 more sales than the year before (+14.1%). After trending up the last four months, sales dipped in Charles City County with two fewer sales (-50.0%).
- Regionwide, pending sales continued to rise in the month of September. The total number of pending sales in the WAAR area came to 287 in September, 50 more than the year before, increasing by 21.1%. James City County had the largest influx of pending sales (+27 pending sales) followed by York County (+17 pending sales). Activity fell in New Kent County (-3 pending sales) and Charles City County (-1 pending sale).
- The median sales price surged in the WAAR market this month. In September, the median costs of a home went up 18.2% with the price at \$490,495 in the area, \$75,495 higher than the previous year. There were significant price gains in markets such as New Kent County with a \$105,000 hike in median price (+28.0%) and Charles City County with homes prices up \$100,000 from a year earlier (+35.4%).
- An increase in listing activity this month led to more supply in the WAAR footprint. There were 960 listings at the end of September, 324 more listings than last year, a 50.9% surge in activity. Listings went up the most in James City County with 151 more listings than the year before (+53.2%) and New Kent County with 68 additional listings (+57.1%).

INTEREST RATE TRACKER



WAAR Market Dashboard

YoY Chg	Sep-25	Indicator
▲ 19.3%	290	Sales
▲ 21.1%	287	Pending Sales
▲ 46.3%	392	New Listings
▲ 6.2%	\$520,385	Average List Price
▲ 4.8%	\$511,181	Average Sales Price
▲ 18.2%	\$490,495	Median Sales Price
▼ -1.1%	\$215	Average Price Per Square Foot
▲ 25.1%	\$148.2	Sold Dollar Volume (in millions)
▼ -1.0%	98.4%	Average Sold/Ask Price Ratio
▲ 53.6%	41	Average Days on Market
▲ 111.5%	28	Median Days on Market
▲ 50.9%	960	Active Listings
▲ 45.8%	3.6	Months of Supply

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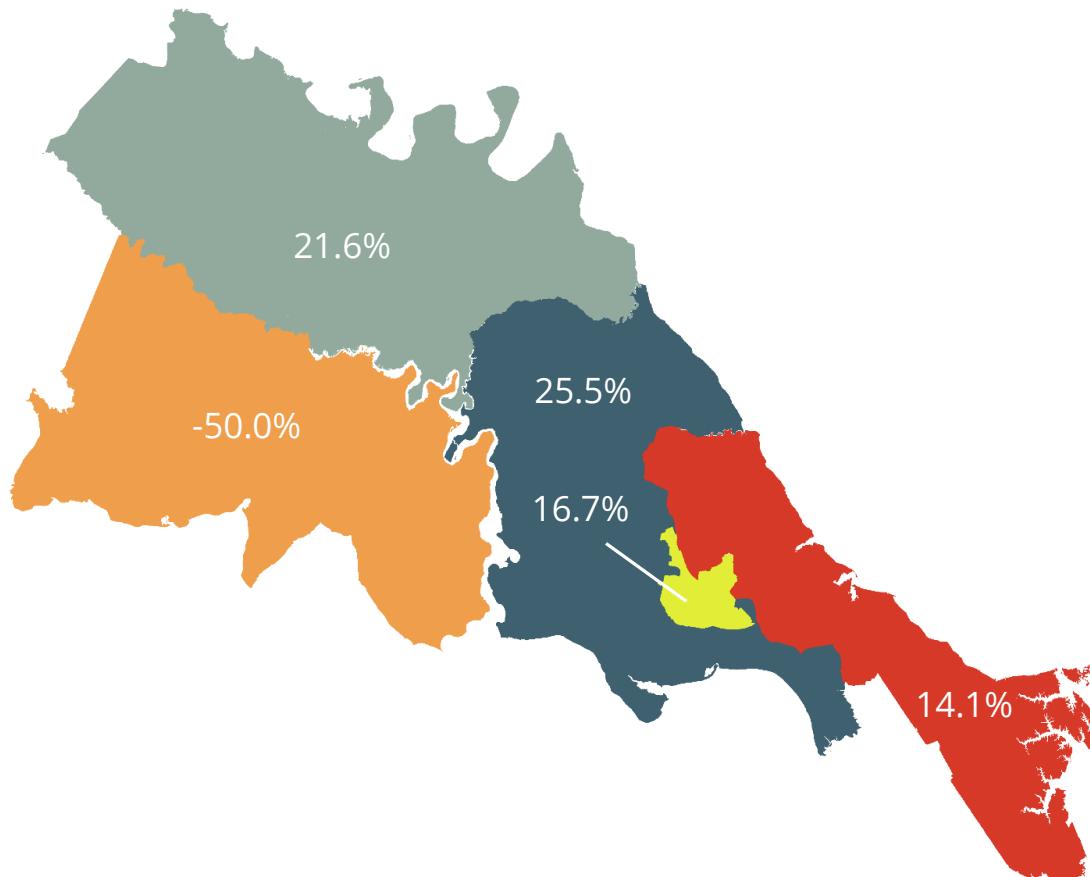
Consumers Should Consult with a REALTOR®. Buying or selling real estate, for a majority of consumers, is one of the most important decisions they will make. Choosing a real estate professional continues to be a vital part of this process.

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



Total Market Overview

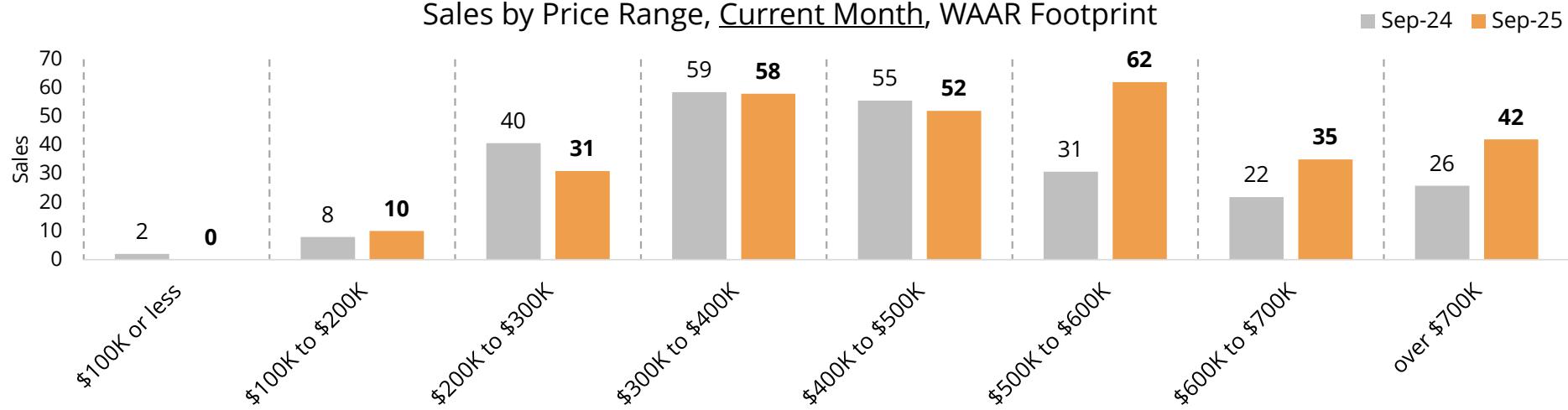


Key Metrics	2-year Trends			Sep-24	Sep-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Sep-23	Sep-24	Sep-25						
Sales		243	290	19.3%	2,411	2,458	1.9%		
Pending Sales		237	287	21.1%	2,204	2,273	3.1%		
New Listings		268	392	46.3%	2,951	3,591	21.7%		
Average List Price		\$490,207	\$520,385	6.2%	\$480,478	\$509,365	6.0%		
Average Sales Price		\$487,709	\$511,181	4.8%	\$481,556	\$505,585	5.0%		
Median Sales Price		\$415,000	\$490,495	18.2%	\$429,000	\$460,000	7.2%		
Average Price Per Square Foot		\$218	\$215	-1.1%	\$211	\$219	3.7%		
Sold Dollar Volume (in millions)		\$118.5	\$148.2	25.1%	\$1,156.6	\$1,237.5	7.0%		
Average Sold/Ask Price Ratio		99.5%	98.4%	-1.0%	100.4%	99.6%	-0.8%		
Average Days on Market		27	41	53.6%	30	33	11.8%		
Median Days on Market		13	28	111.5%	10	17	70.0%		
Active Listings		636	960	50.9%	n/a	n/a	n/a		
Months of Supply		2.4	3.6	45.8%	n/a	n/a	n/a		

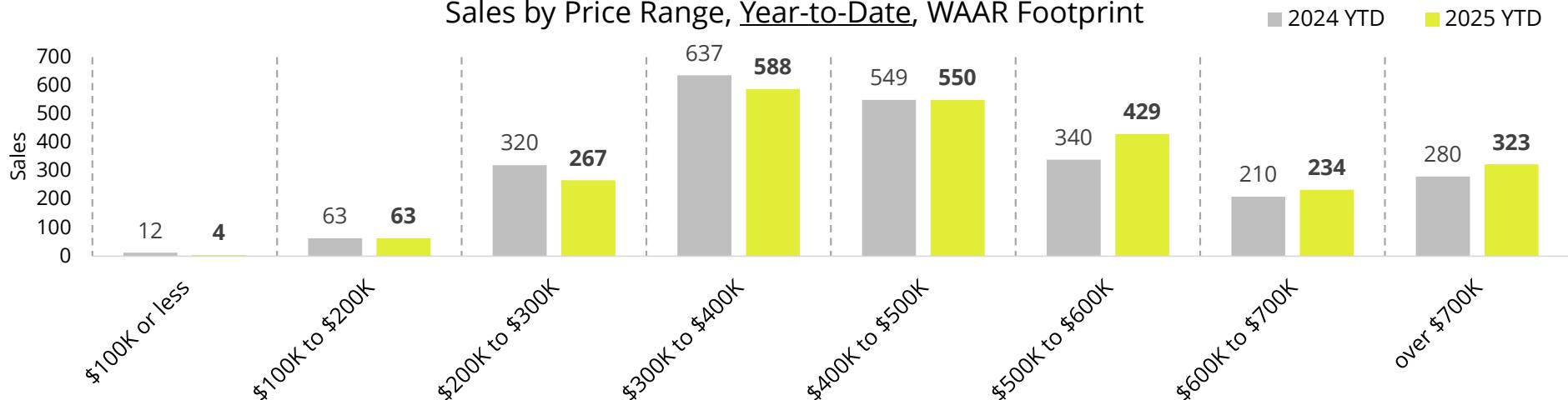
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



Sales by Price Range, Year-to-Date, WAAR Footprint



Single-Family Detached Market Overview

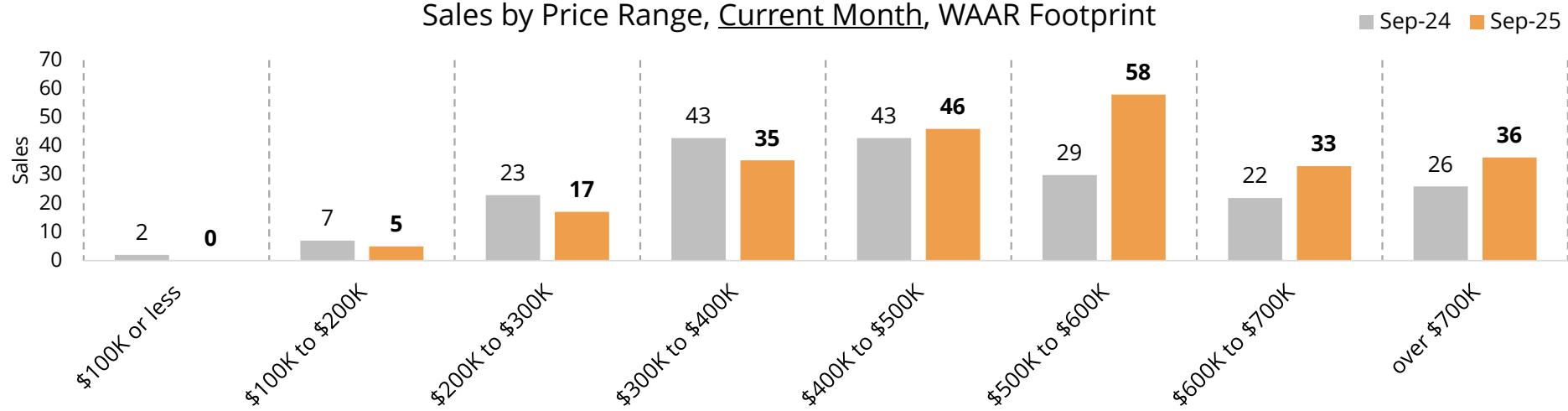


Key Metrics	2-year Trends			Sep-24	Sep-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Sep-23	Sep-24	Sep-25						
Sales		195	230	17.9%	1,960	1,993	1.7%		
Pending Sales		196	234	19.4%	1,878	1,907	1.5%		
New Listings		218	325	49.1%	2,465	2,969	20.4%		
Average List Price		\$524,036	\$552,173	5.4%	\$510,863	\$542,864	6.3%		
Average Sales Price		\$521,135	\$543,400	4.3%	\$512,210	\$539,109	5.3%		
Median Sales Price		\$447,450	\$528,000	18.0%	\$462,383	\$493,865	6.8%		
Average Price Per Square Foot		\$220	\$216	-1.7%	\$213	\$221	3.5%		
Sold Dollar Volume (in millions)		\$101.6	\$125.0	23.0%	\$999.5	\$1,070.9	7.1%		
Average Sold/Ask Price Ratio		99.3%	98.6%	-0.8%	100.4%	99.7%	-0.7%		
Average Days on Market		27	42	59.4%	30	33	9.8%		
Median Days on Market		12	32	166.7%	9	17	88.9%		
Active Listings		532	801	50.6%	n/a	n/a	n/a		
Months of Supply		2.5	3.7	45.3%	n/a	n/a	n/a		

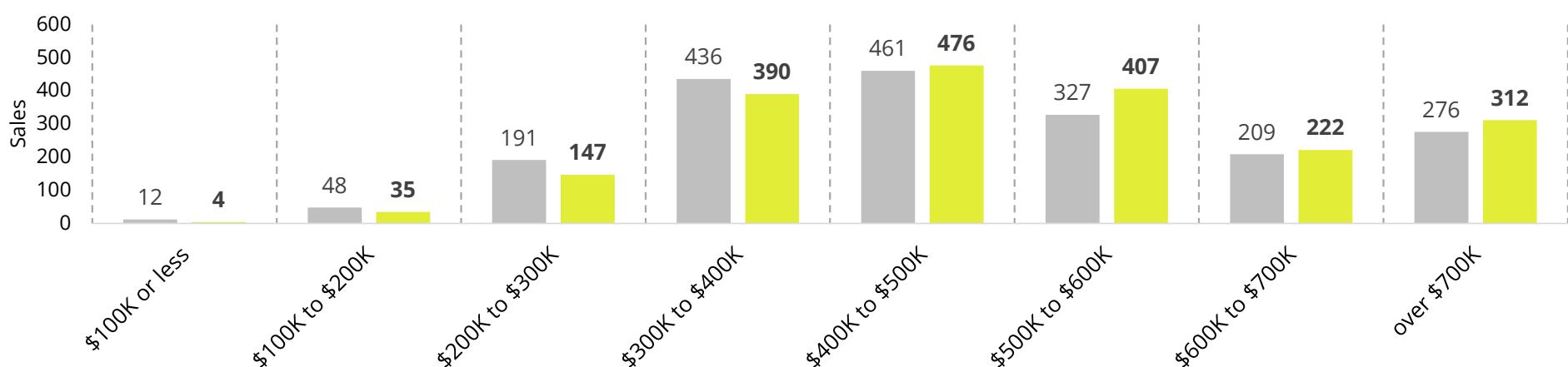
Single-Family Detached Market by Price Range



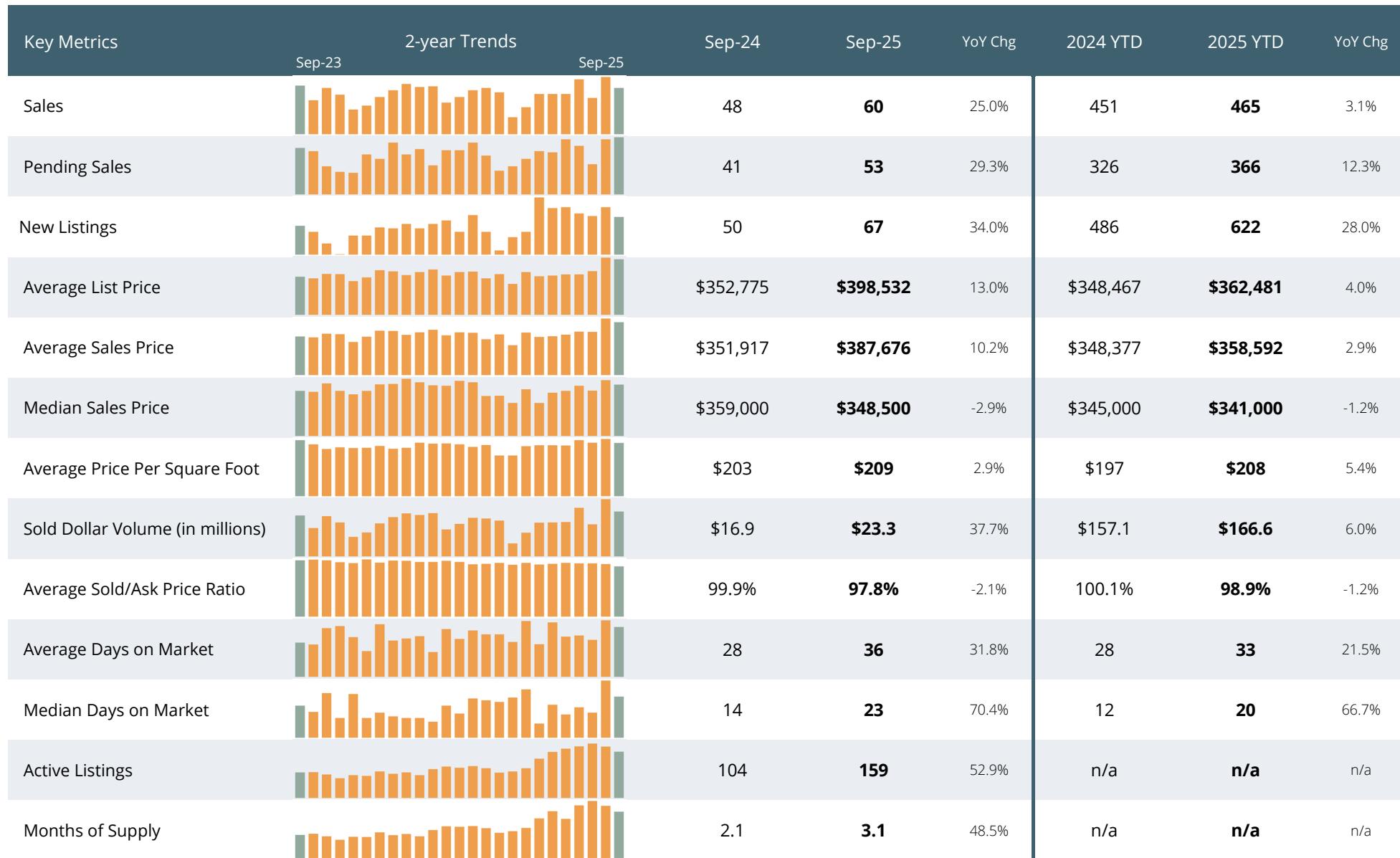
Sales by Price Range, Current Month, WAAR Footprint



Sales by Price Range, Year-to-Date, WAAR Footprint



Townhome & Condo Market Overview

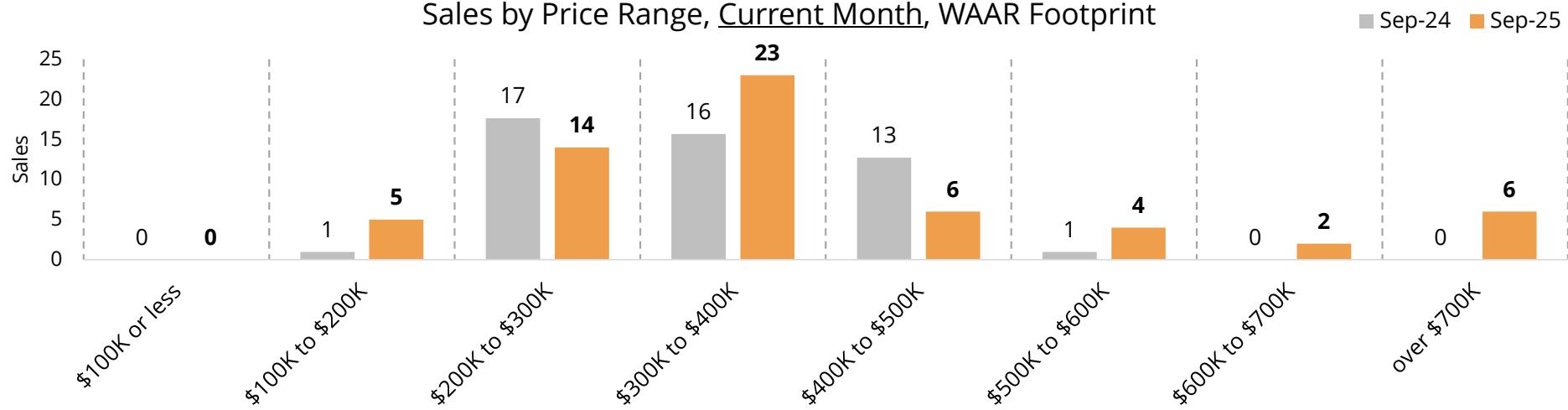


Source: Virginia REALTORS®, data accessed October 15, 2025

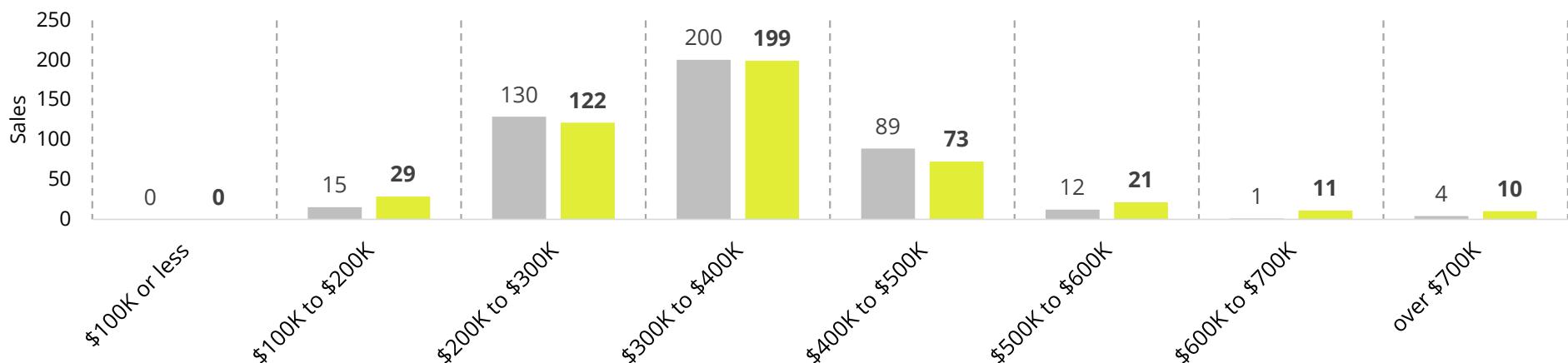
Townhome & Condo Market by Price Range



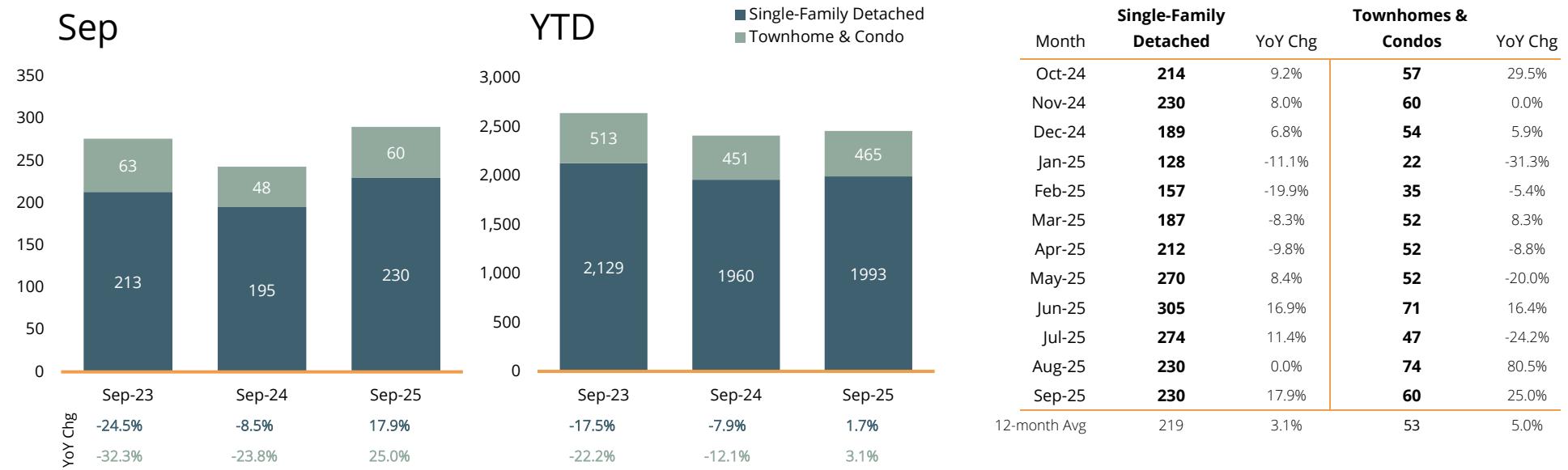
Sales by Price Range, Current Month, WAAR Footprint



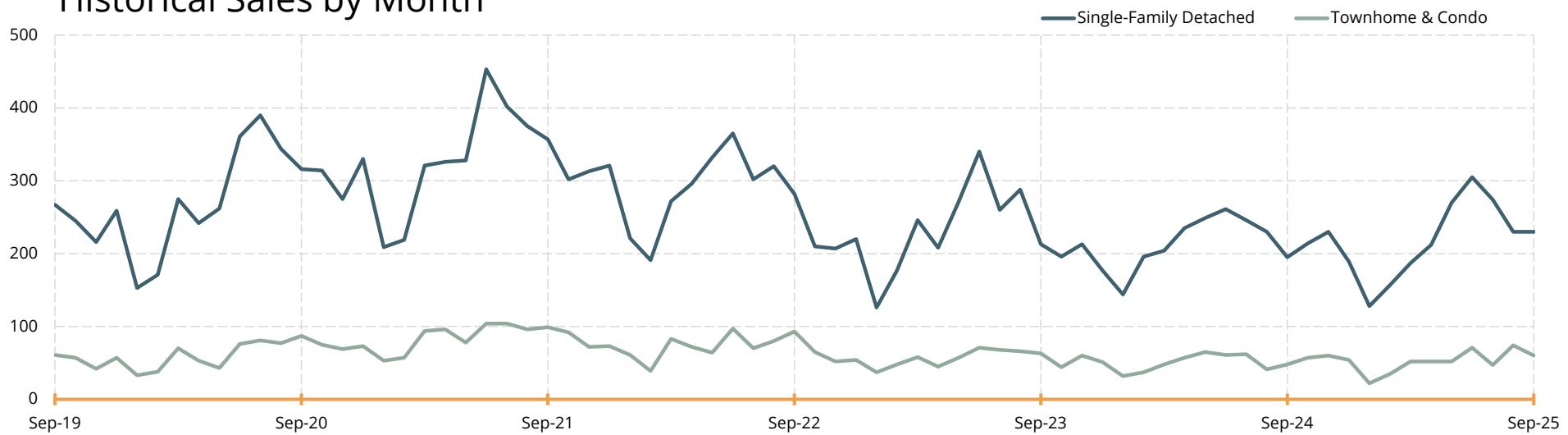
Sales by Price Range, Year-to-Date, WAAR Footprint



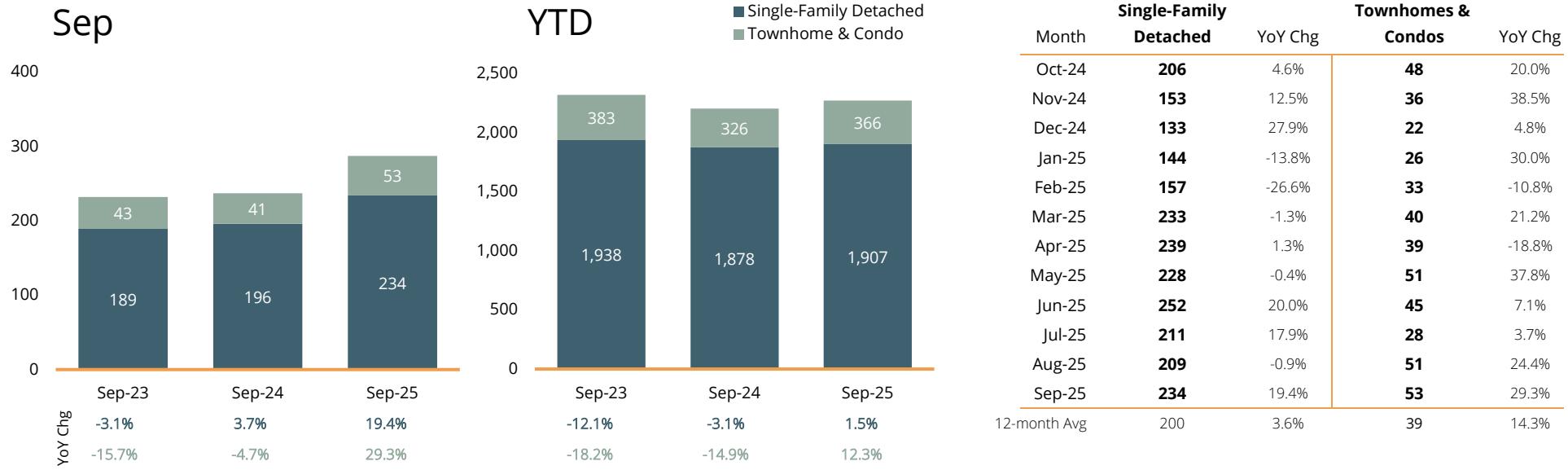
Sales



Historical Sales by Month



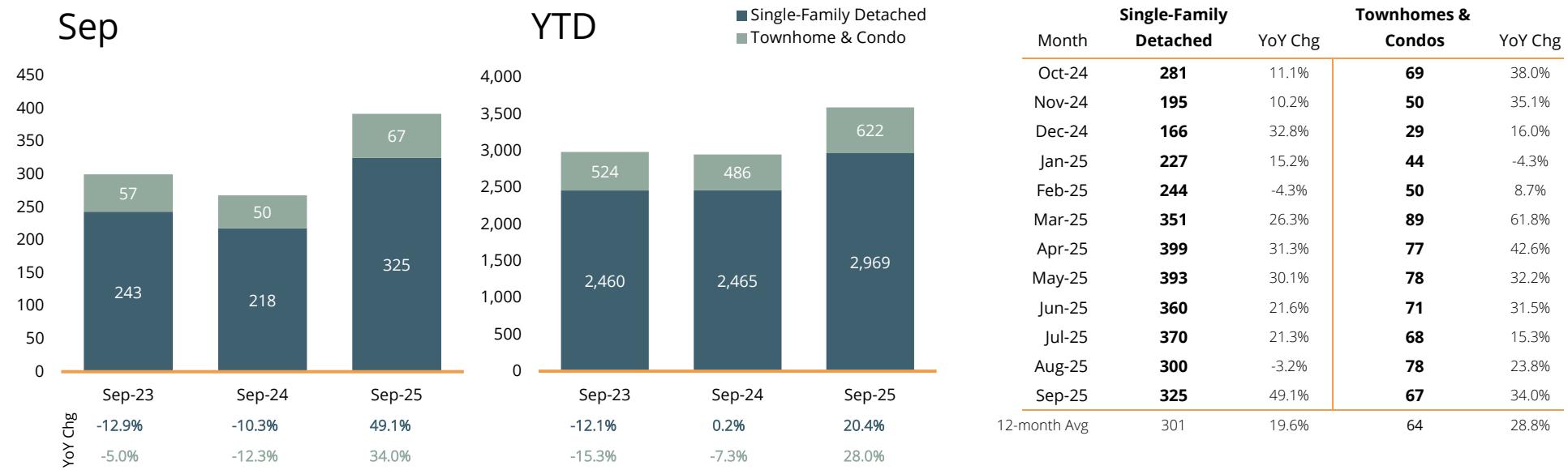
Pending Sales



Historical Pending Sales by Month



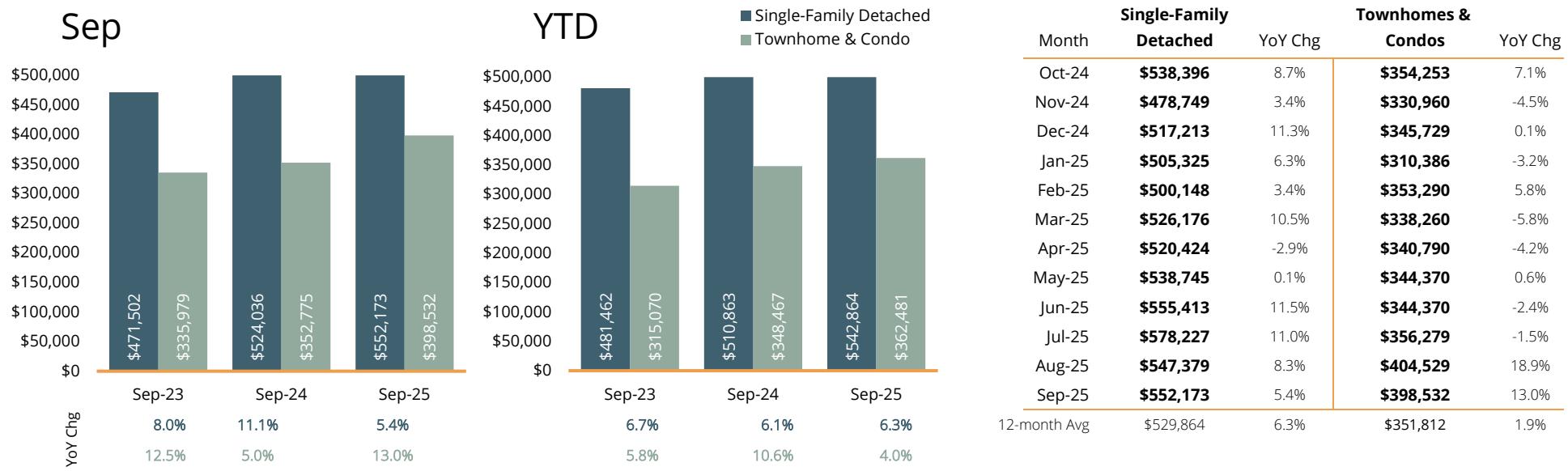
New Listings



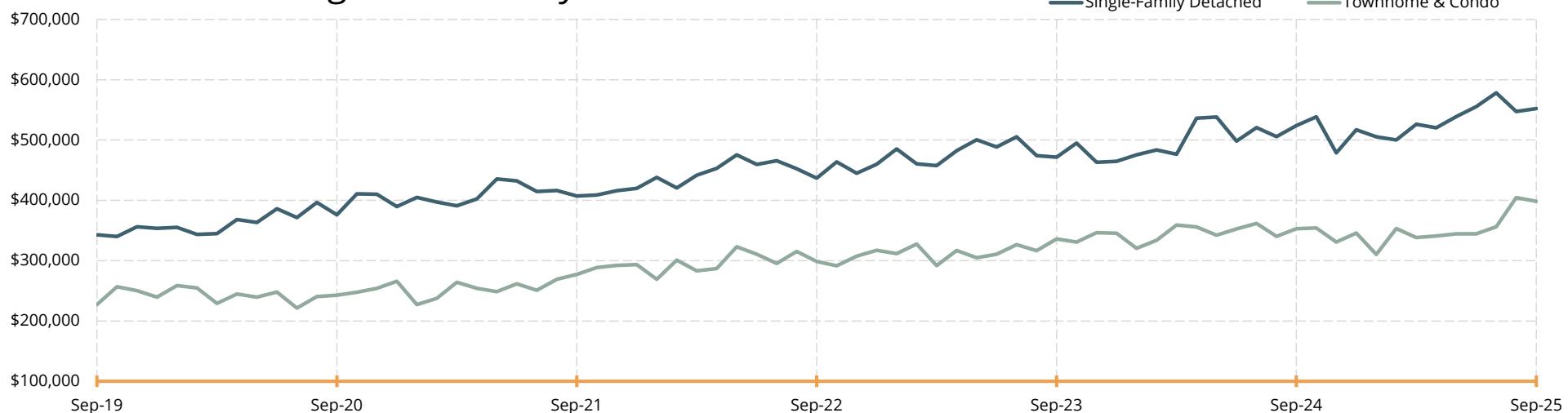
Historical New Listings by Month



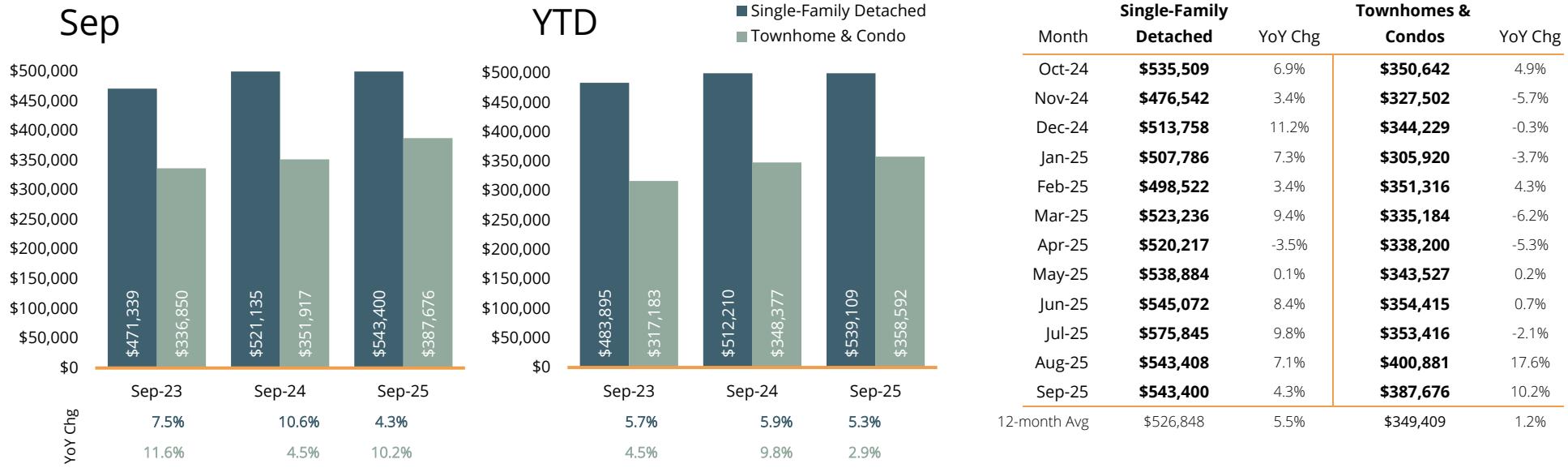
Average List Price



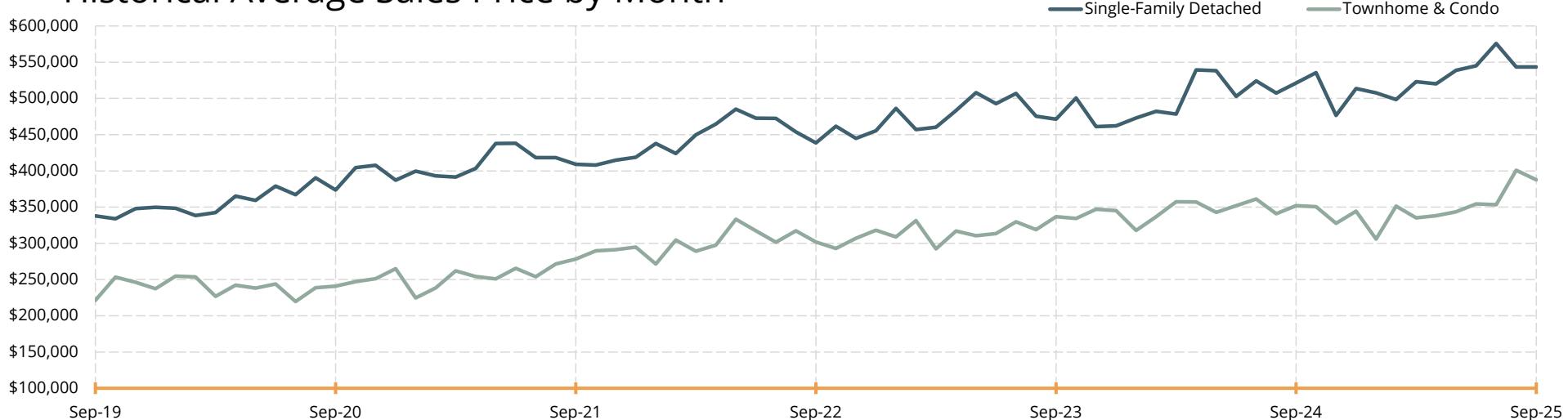
Historical Average List Price by Month



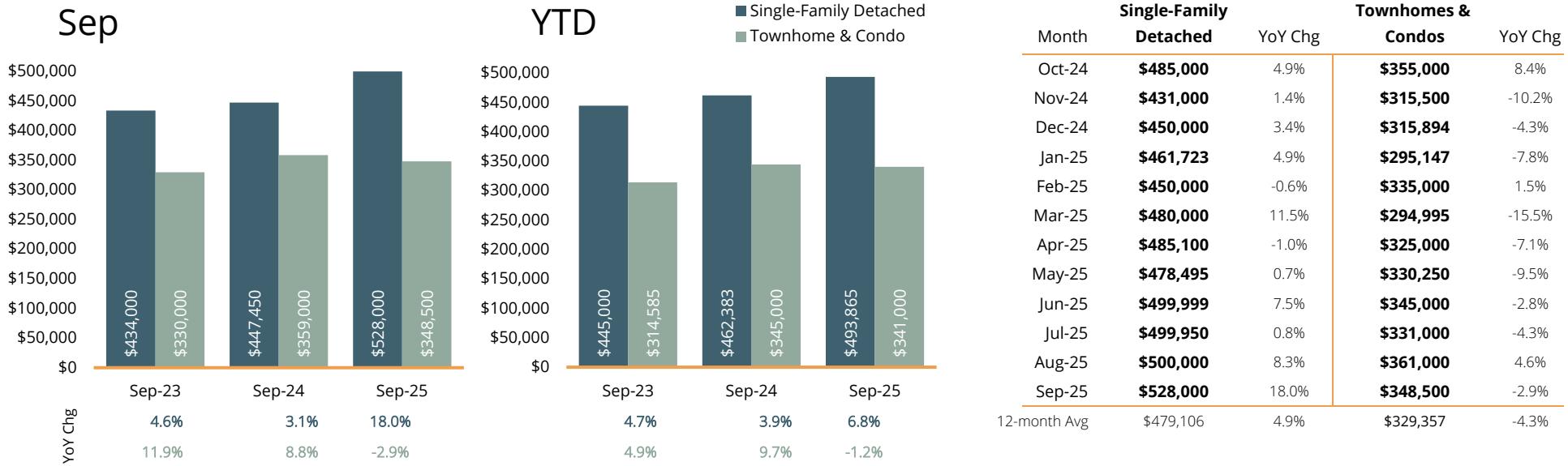
Average Sales Price



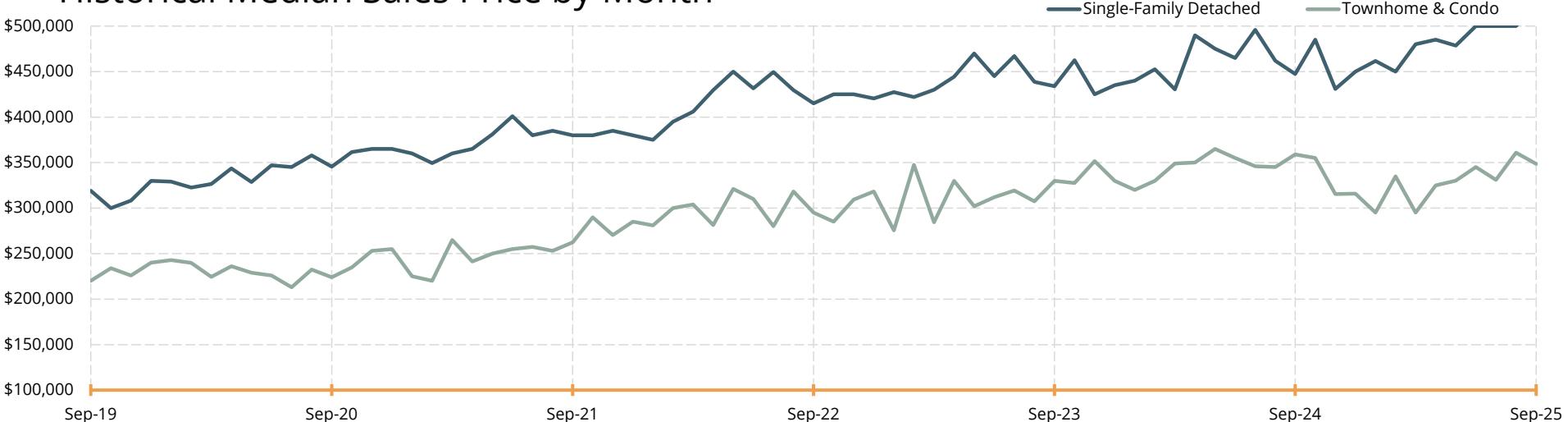
Historical Average Sales Price by Month



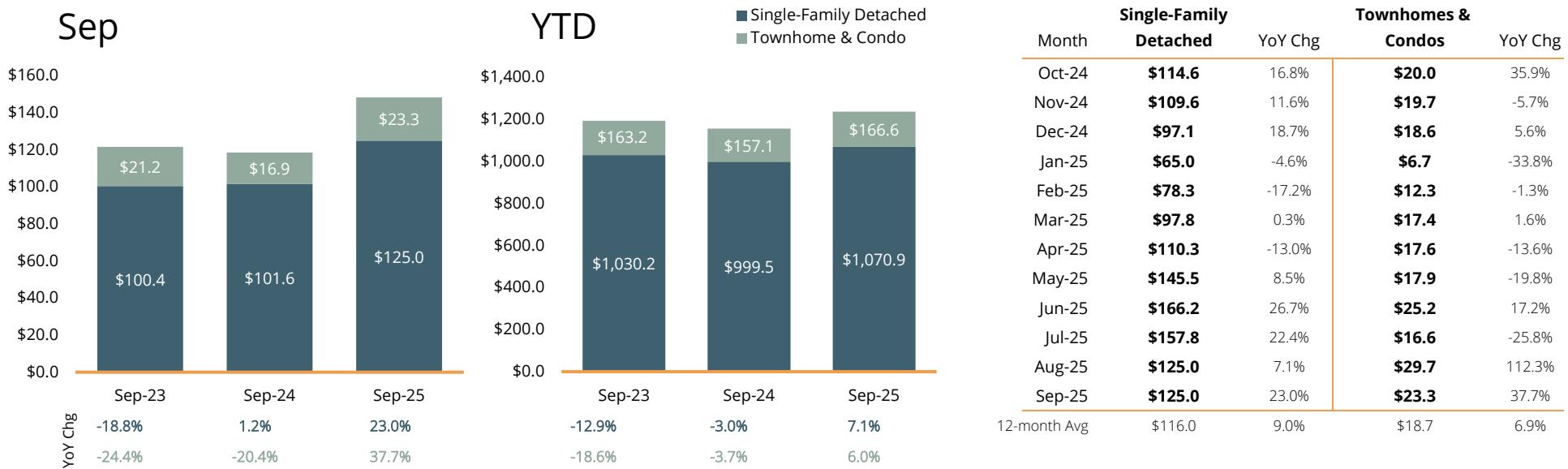
Median Sales Price



Historical Median Sales Price by Month



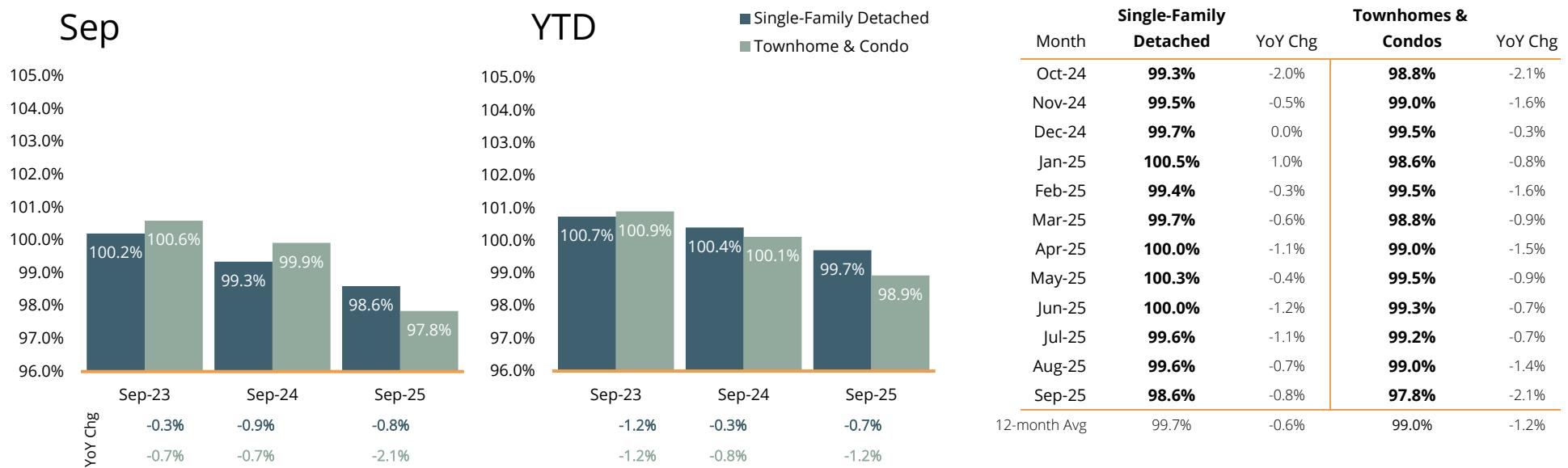
Sold Dollar Volume (in millions)



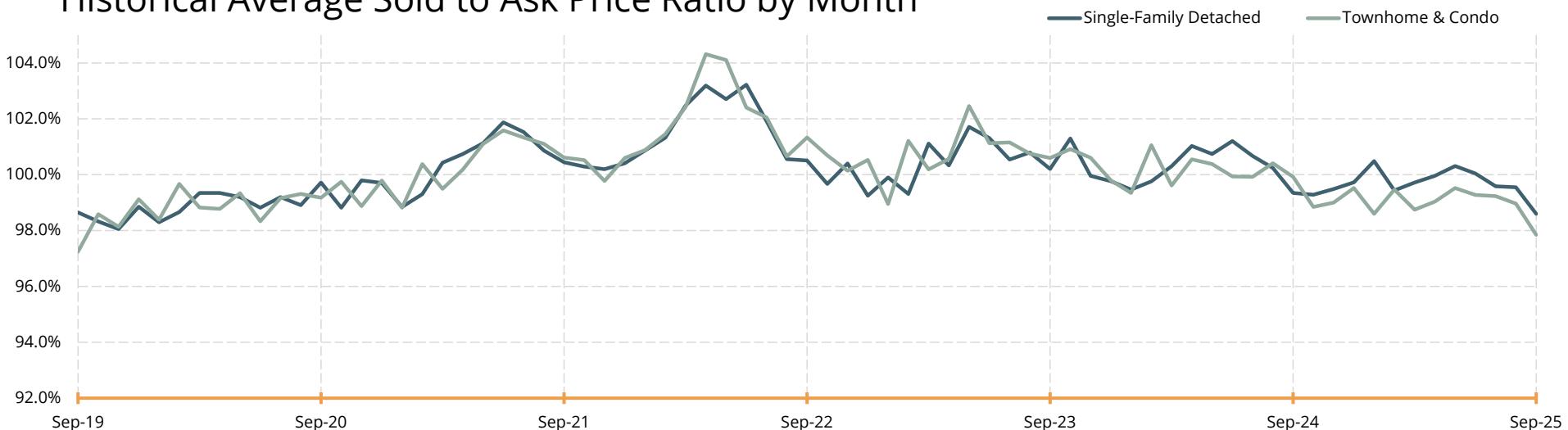
Historical Sold Dollar Volume by Month (in millions)



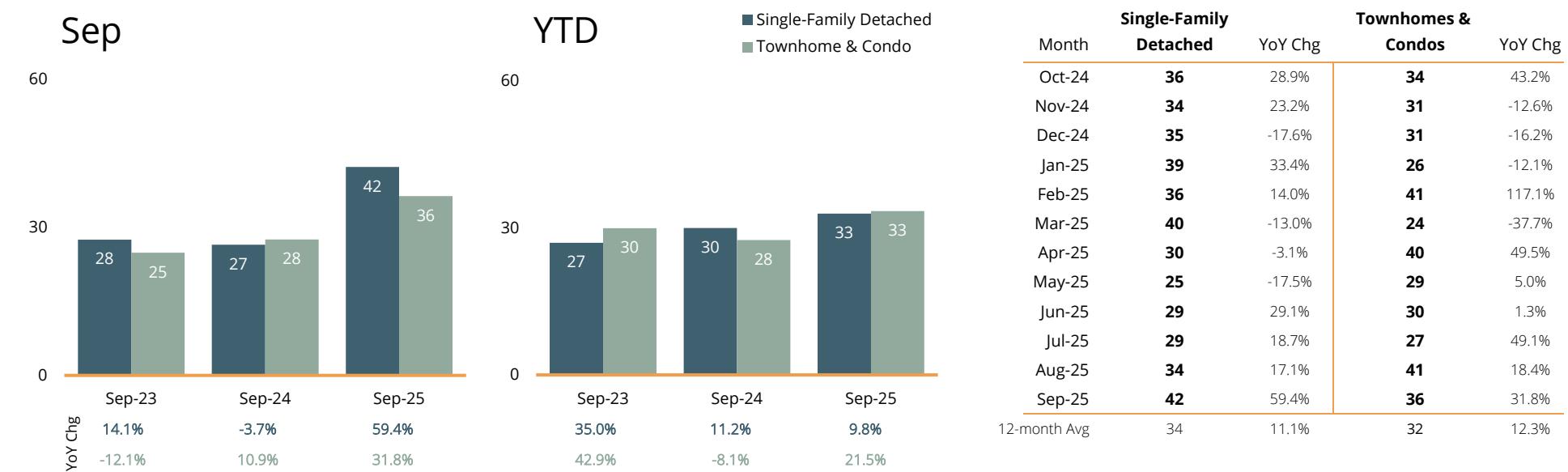
Average Sold to Ask Price Ratio



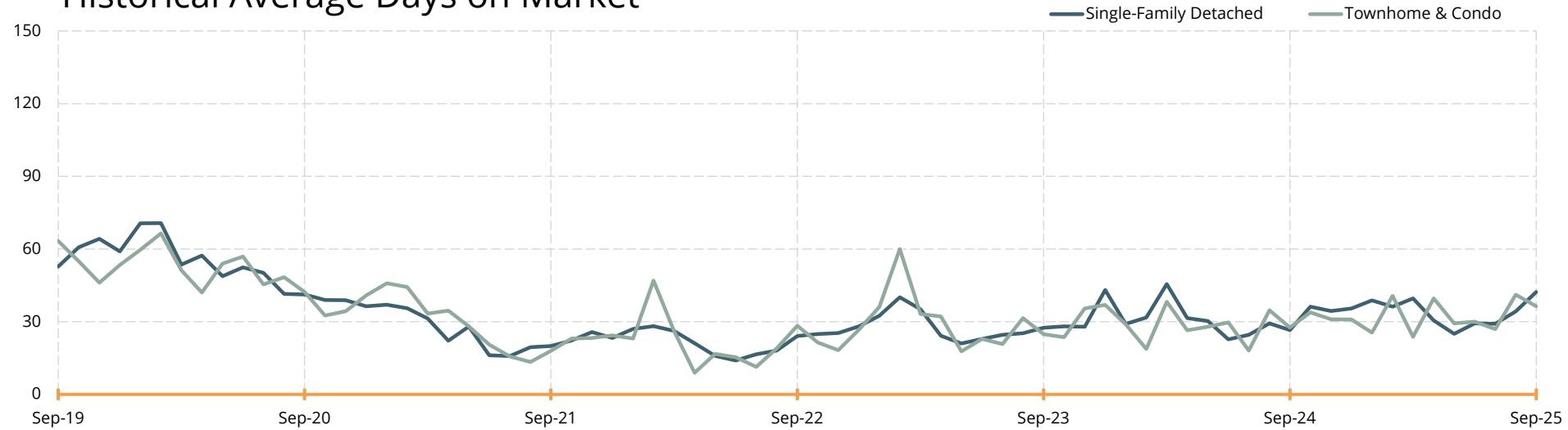
Historical Average Sold to Ask Price Ratio by Month



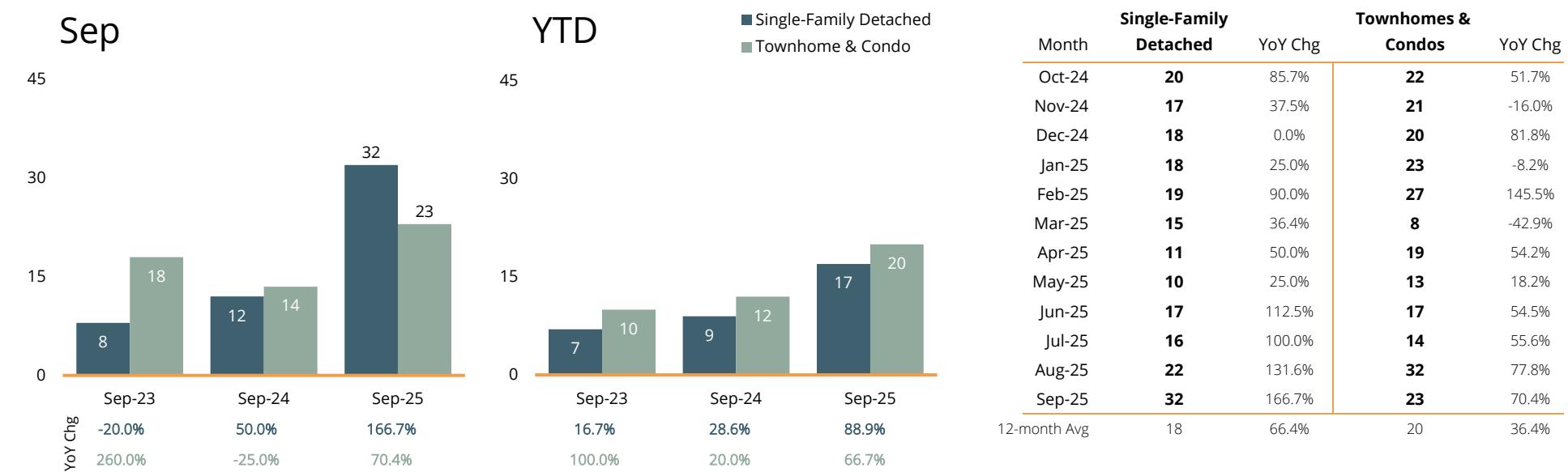
Average Days on Market



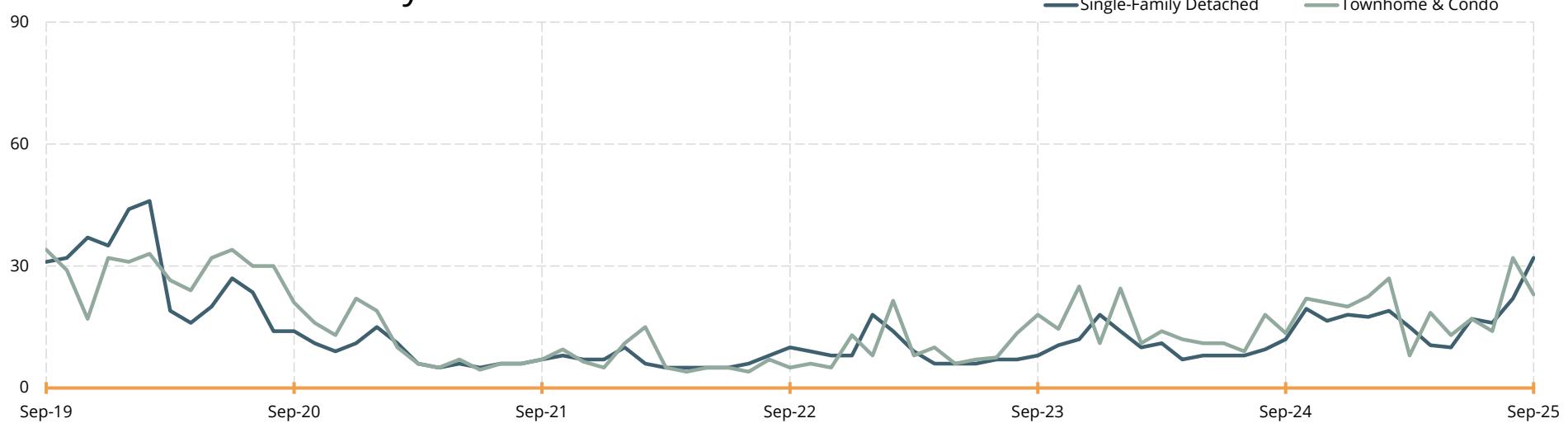
Historical Average Days on Market



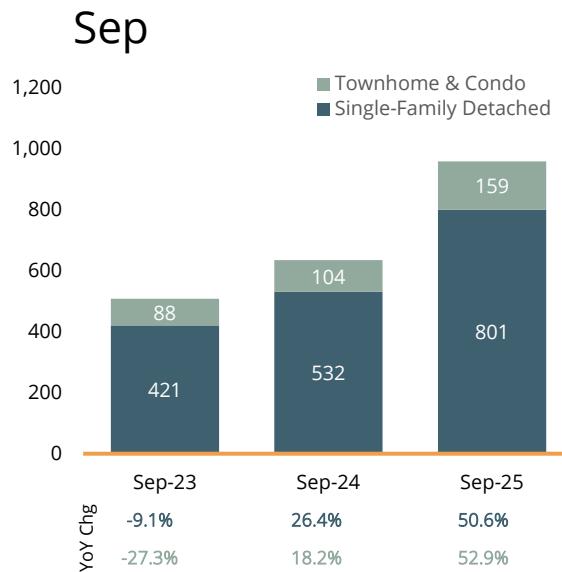
Median Days on Market



Historical Median Days on Market

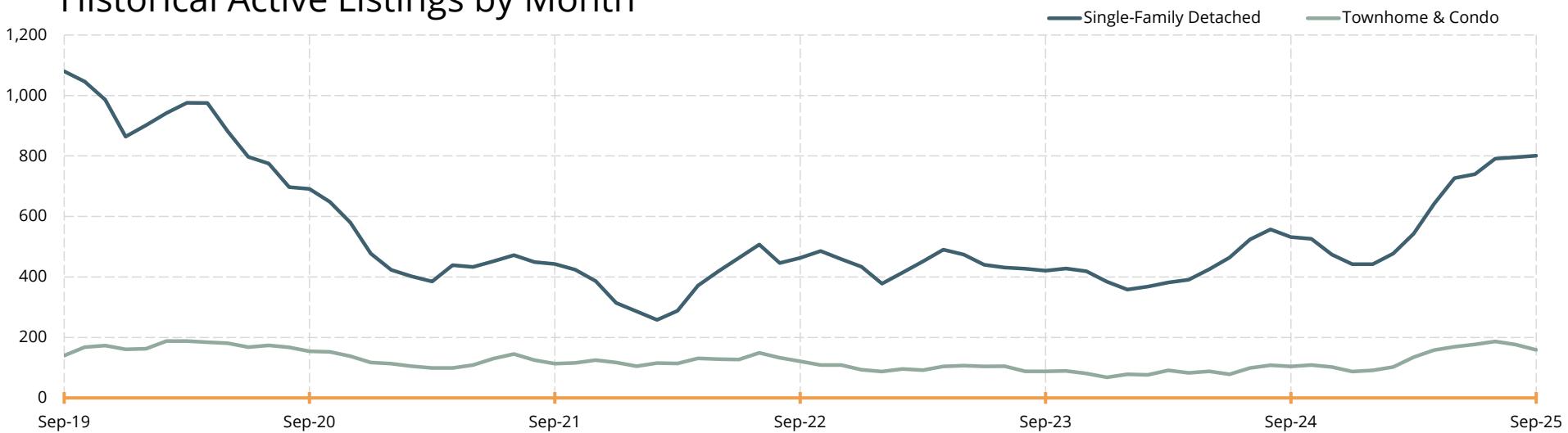


Active Listings

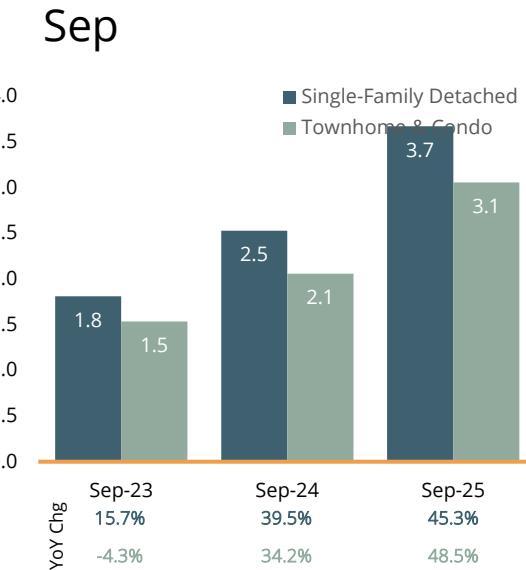


Month	Single-Family Detached	YoY Chg	Townhomes & Condos	
			Condos	YoY Chg
Oct-24	526	22.9%	109	22.5%
Nov-24	474	13.1%	102	25.9%
Dec-24	442	15.1%	87	27.9%
Jan-25	442	23.5%	91	16.7%
Feb-25	477	29.6%	102	34.2%
Mar-25	543	42.1%	135	48.4%
Apr-25	642	64.2%	158	90.4%
May-25	727	71.1%	169	92.0%
Jun-25	740	59.5%	177	126.9%
Jul-25	791	51.0%	187	88.9%
Aug-25	796	42.9%	176	63.0%
Sep-25	801	50.6%	159	52.9%
12-month Avg	617	41.5%	138	58.4%

Historical Active Listings by Month



Months of Supply



Month	Single-Family Detached	YoY Chg	Townhomes & Condos	
			Condos	YoY Chg
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%
Jul-25	3.6	50.5%	3.8	104.1%
Aug-25	3.7	40.7%	3.4	64.6%
Sep-25	3.7	45.3%	3.1	48.5%
12-month Avg	2.9	47.2%	2.6	63.6%

Historical Months of Supply by Month



Area Overview - Total Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg
James City County	129	176	36.4%	106	133	25.5%	\$574,507	\$568,037	-1.1%	\$460,000	\$535,000	16.3%	284	435	53.2%	2.3	3.5	49.5%
Williamsburg	23	27	17.4%	18	21	16.7%	\$350,222	\$418,845	19.6%	\$362,000	\$380,000	5.0%	47	84	78.7%	2.3	5.6	139.0%
York County	68	113	66.2%	78	89	14.1%	\$471,171	\$453,372	-3.8%	\$425,140	\$435,000	2.3%	178	242	36.0%	2.4	3.0	22.3%
New Kent County	43	73	69.8%	37	45	21.6%	\$363,260	\$506,281	39.4%	\$375,000	\$480,000	28.0%	119	187	57.1%	2.9	4.3	49.0%
Charles City County	5	3	-40.0%	4	2	-50.0%	\$279,875	\$382,500	36.7%	\$282,500	\$382,500	35.4%	8	12	50.0%	2.3	2.8	20.6%

Area Overview - Total Market YTD



New Listings YTD				Sales YTD				Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	
James City County	1,430	1,737	21.5%	1,145	1,156	1.0%	\$518,381	\$539,087	4.0%	\$450,000	\$485,000	7.8%	284	435	53.2%	
Williamsburg	205	245	19.5%	160	134	-16.3%	\$436,312	\$459,878	5.4%	\$398,318	\$404,000	1.4%	47	84	78.7%	
York County	786	945	20.2%	720	743	3.2%	\$455,897	\$479,755	5.2%	\$420,165	\$450,738	7.3%	178	242	36.0%	
New Kent County	485	619	27.6%	350	390	11.4%	\$461,224	\$478,034	3.6%	\$425,650	\$447,450	5.1%	119	187	57.1%	
Charles City County	45	45	0.0%	36	35	-2.8%	\$308,339	\$425,133	37.9%	\$280,000	\$330,000	17.9%	8	12	50.0%	

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg
James City County	101	145	43.6%	87	104	19.5%	\$625,045	\$609,681	-2.5%	\$505,000	\$597,000	18.2%	226	351	55.3%	2.3	3.6	56.2%
Williamsburg	16	17	6.3%	9	11	22.2%	\$334,111	\$401,397	20.1%	\$364,000	\$380,000	4.4%	31	53	71.0%	2.4	5.4	123.6%
York County	57	91	59.6%	62	68	9.7%	\$498,190	\$494,296	-0.8%	\$486,553	\$508,643	4.5%	157	207	31.8%	2.7	3.1	14.7%
New Kent County	39	69	76.9%	33	45	36.4%	\$370,546	\$506,281	36.6%	\$380,480	\$480,000	26.2%	110	178	61.8%	3.0	4.6	54.9%
Charles City County	5	3	-40.0%	4	2	-50.0%	\$279,875	\$382,500	36.7%	\$282,500	\$382,500	35.4%	8	12	50.0%	2.3	2.8	20.6%

Area Overview - Single Family Detached Market YTD



New Listings YTD					Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	
James City County	1,186	1,398	17.9%	924	902	-2.4%	\$556,629	\$583,604	4.8%	\$487,250	\$535,000	9.8%	226	351	55.3%	
Williamsburg	136	165	21.3%	100	90	-10.0%	\$496,684	\$512,685	3.2%	\$450,000	\$452,500	0.6%	31	53	71.0%	
York County	656	788	20.1%	575	610	6.1%	\$484,159	\$511,161	5.6%	\$459,250	\$486,550	5.9%	157	207	31.8%	
New Kent County	442	573	29.6%	325	356	9.5%	\$473,758	\$492,112	3.9%	\$440,000	\$460,250	4.6%	110	178	61.8%	
Charles City County	45	45	0.0%	36	35	-2.8%	\$308,339	\$425,133	37.9%	\$280,000	\$330,000	17.9%	8	12	50.0%	

Area Overview - Townhome & Condo Market



New Listings				Sales				Average Sales Price			Median Sales Price			Active Listings			Months Supply		
Geography	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	
James City County	28	31	10.7%	19	29	52.6%	\$343,095	\$418,697	22.0%	\$300,000	\$374,000	24.7%	58	84	44.8%	2.4	3.0	26.2%	
Williamsburg	7	10	42.9%	9	10	11.1%	\$366,333	\$438,039	19.6%	\$360,000	\$375,250	4.2%	16	31	93.8%	2.2	5.8	169.4%	
York County	11	22	100.0%	16	21	31.3%	\$366,474	\$320,857	-12.4%	\$376,253	\$325,000	-13.6%	21	35	66.7%	1.4	2.5	73.5%	
New Kent County	4	4	0.0%	4	0	-100.0%	\$303,158	\$0	-100.0%	\$298,133	\$0	-100.0%	9	9	0.0%	2.3	2.0	-13.0%	
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	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg	Sep-24	Sep-25	% chg
James City County	244	339	38.9%	221	254	14.9%	\$358,209	\$378,934	5.8%	\$346,000	\$365,000	5.5%	58	84	44.8%
Williamsburg	69	80	15.9%	60	44	-26.7%	\$339,101	\$355,465	4.8%	\$350,000	\$316,500	-9.6%	16	31	93.8%
York County	130	157	20.8%	145	133	-8.3%	\$344,826	\$326,708	-5.3%	\$355,000	\$325,000	-8.5%	21	35	66.7%
New Kent County	43	46	7.0%	25	34	36.0%	\$308,402	\$330,628	7.2%	\$303,990	\$329,363	8.3%	9	9	0.0%
Charles City County	0	0	n/a	0	0	n/a	\$0	\$0	n/a	\$0	\$0	n/a	0	0	n/a



The Virginia REALTORS® association is the largest professional trade association in Virginia, representing 35,000 REALTORS® engaged in the residential and commercial real estate business. The Virginia REALTORS® association serves as the advocate for homeownership and private property rights and represents the interests of real estate professionals and property owners in the Commonwealth of Virginia.

NOTE: The term REALTOR® is a registered collective membership mark that identifies a real estate professional who is a member of the National Association of REALTORS® and subscribes to its strict code of ethics.

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Data and analysis provided by Virginia REALTORS® Research Team

The numbers reported here are preliminary and based on current entries into multiple listing services. Over time, data may be adjusted slightly to reflect increased reporting. Information is sourced from multiple listing services across Virginia and is deemed reliable, but not guaranteed.