

WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

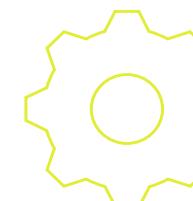
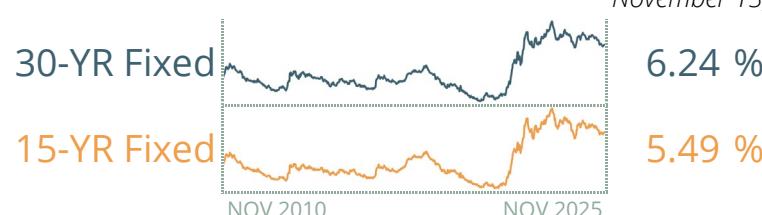
WAAR Market Indicators Report



Key Market Trends: October 2025

- Sales rose for the sixth straight month in the WAAR area.** There were 278 home sales in October, seven more sales than the previous year, increasing by 2.6%. Activity went up in James City County with 18 more transactions than last year (+15.4%) and Williamsburg with 13 more than the year before (+130.0%). New Kent County saw the biggest drop in sales this month with 19 fewer than a year ago (-35.8%).
- After going up the last five months, pending sales dipped in the WAAR footprint.** At 250, the total number of pending sales decreased by 1.6% in October, four fewer than the previous year. New Kent County saw the biggest growth in pending sales this month (+11 pending sales) followed by York County (+3 pending sales). Pending sales dropped in Williamsburg this month after increasing last month (-12 pending sales).
- Home prices continued to climb across the WAAR region this month.** At \$460,000, the median sales price was \$24,690 higher than the year before, a 5.7% uptick in sales price. In Charles City County prices jumped up 97% or \$232,6000 with the median costs at \$472,500 in October. There was no price change in James City County with the median home price at \$485,000.
- In the WAAR market, listings continued to surge.** October ended with 997 active listings on the market, climbing up 57%, which is 362 more listings than last year. Listings went up the most in James City County with 147 additional listings (+51.9%) and York County with 98 more than the year prior (+59.0%). Charles City County was the only market where listings dipped with four fewer than the same time last October (-33.3%).

INTEREST RATE TRACKER



WAAR Market Dashboard

YoY Chg	Oct-25	Indicator
▲ 2.6%	278	Sales
▼ -1.6%	250	Pending Sales
▲ 22.0%	427	New Listings
▲ 3.3%	\$516,026	Average List Price
▲ 2.1%	\$506,918	Average Sales Price
▲ 5.7%	\$460,000	Median Sales Price
▲ 0.9%	\$221	Average Price Per Square Foot
▲ 4.7%	\$140.9	Sold Dollar Volume (in millions)
▼ -1.0%	98.2%	Average Sold/Ask Price Ratio
▲ 32.3%	47	Average Days on Market
▲ 45.0%	29	Median Days on Market
▲ 57.0%	997	Active Listings
▲ 52.7%	3.7	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.

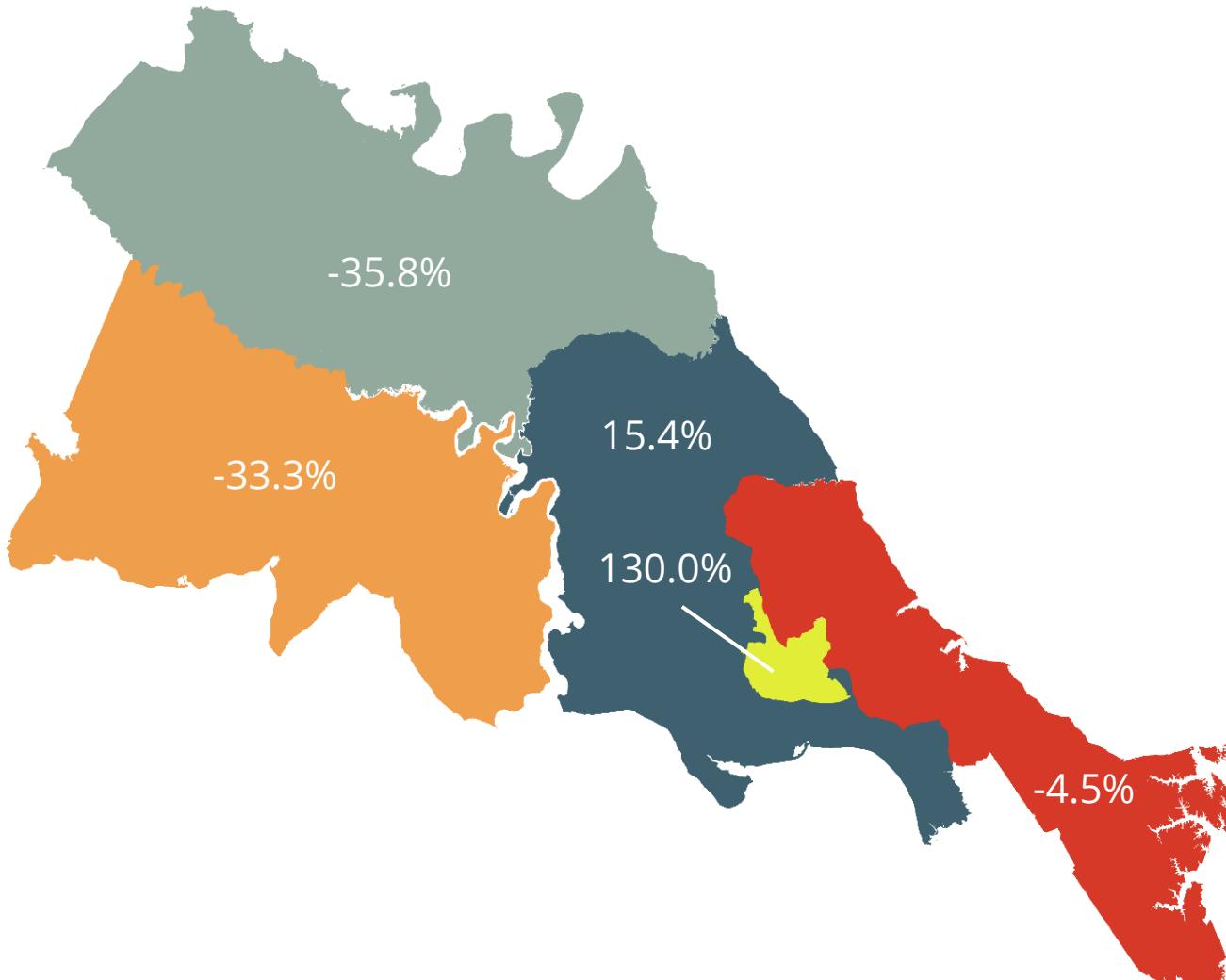
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



Jurisdiction	Total Sales		
	Oct-24	Oct-25	% Chg
Charles City County	3	2	-33.3%
James City County	117	135	15.4%
New Kent County	53	34	-35.8%
Williamsburg	10	23	130.0%
York County	88	84	-4.5%
WAAR	271	278	2.6%

Total Market Overview

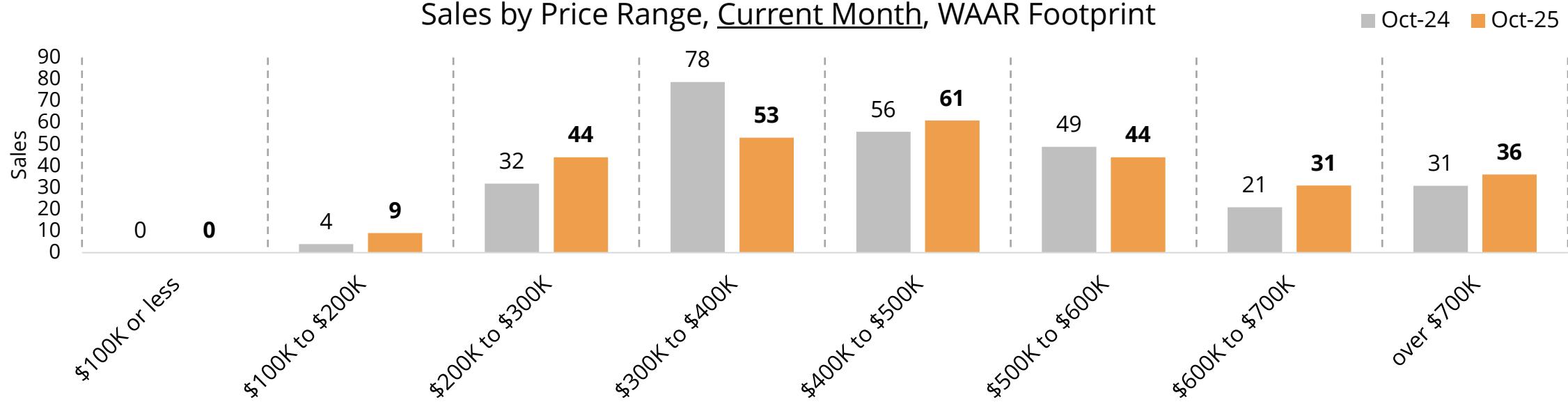


Key Metrics	Oct-23	2-year Trends		Oct-24	Oct-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
		Oct-23	Oct-24						
Sales		271	278	2.6%	2,682	2,736	2.0%		
Pending Sales		254	250	-1.6%	2,458	2,523	2.6%		
New Listings		350	427	22.0%	3,301	4,018	21.7%		
Average List Price		\$499,665	\$516,026	3.3%	\$482,358	\$509,983	5.7%		
Average Sales Price		\$496,625	\$506,918	2.1%	\$483,034	\$505,663	4.7%		
Median Sales Price		\$435,310	\$460,000	5.7%	\$429,870	\$460,000	7.0%		
Average Price Per Square Foot		\$219	\$221	0.9%	\$212	\$220	3.5%		
Sold Dollar Volume (in millions)		\$134.6	\$140.9	4.7%	\$1,291.2	\$1,378.4	6.8%		
Average Sold/Ask Price Ratio		99.2%	98.2%	-1.0%	100.2%	99.4%	-0.8%		
Average Days on Market		36	47	32.3%	30	34	14.2%		
Median Days on Market		20	29	45.0%	11	18	63.6%		
Active Listings		635	997	57.0%	n/a	n/a	n/a		
Months of Supply		2.4	3.7	52.7%	n/a	n/a	n/a		

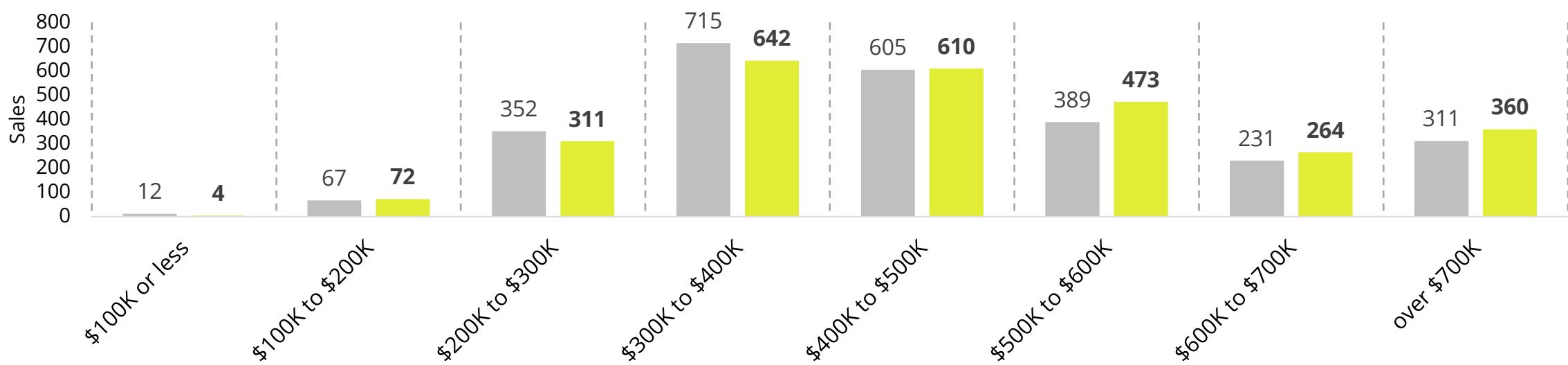
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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

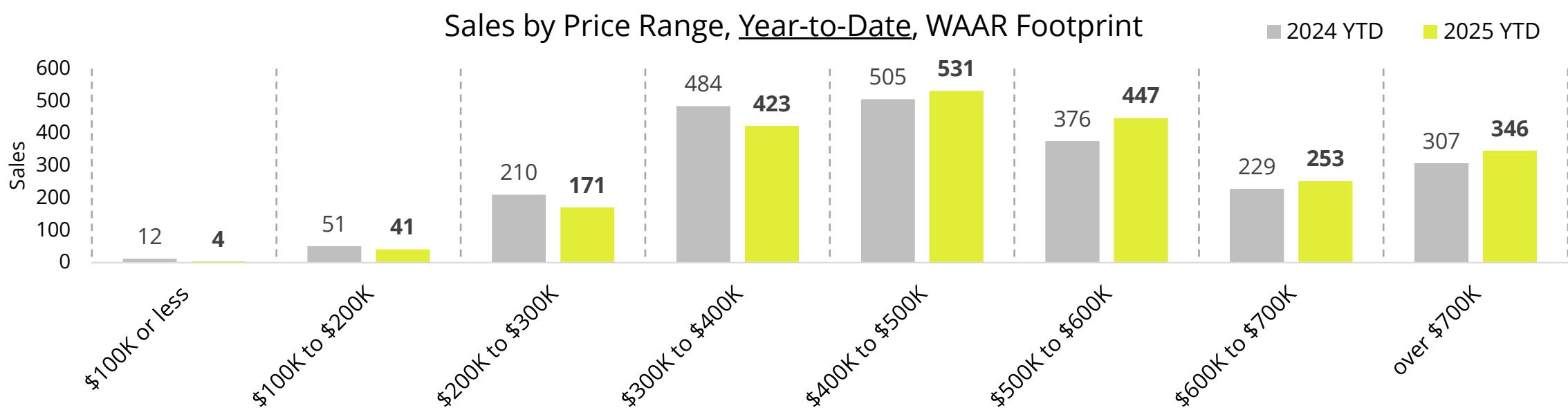
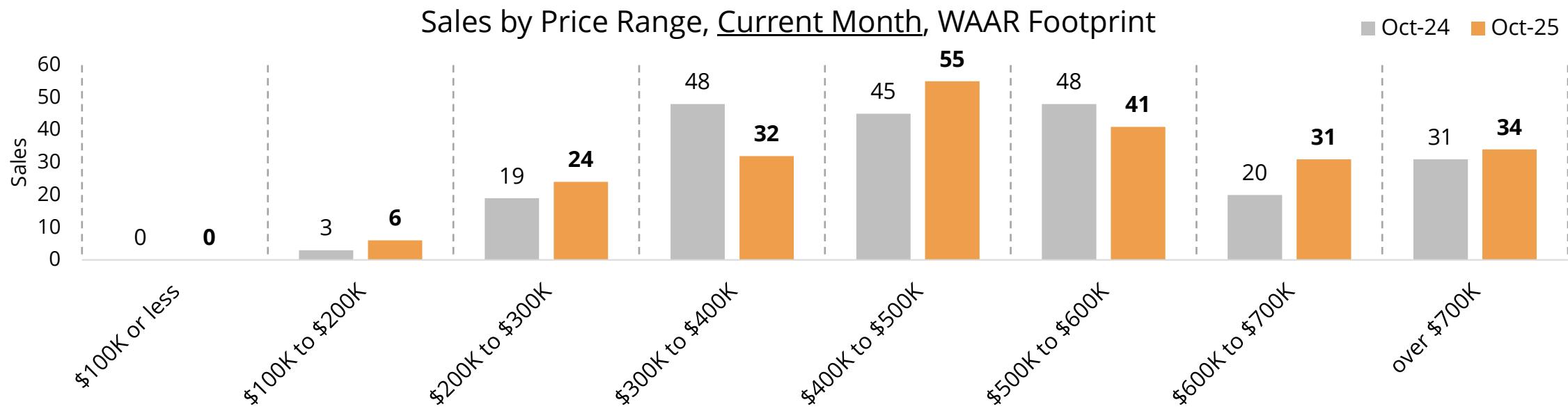


Single-Family Detached Market Overview



Key Metrics	2-year Trends			Oct-24	Oct-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Oct-23	Oct-24	Oct-25						
Sales		214	223	4.2%	2,174	2,216	1.9%		
Pending Sales		206	209	1.5%	2,084	2,116	1.5%		
New Listings		281	346	23.1%	2,746	3,315	20.7%		
Average List Price		\$538,396	\$553,502	2.8%	\$513,643	\$543,915	5.9%		
Average Sales Price		\$535,509	\$543,832	1.6%	\$514,593	\$539,569	4.9%		
Median Sales Price		\$485,000	\$495,000	2.1%	\$465,000	\$494,000	6.2%		
Average Price Per Square Foot		\$223	\$223	0.0%	\$214	\$221	3.2%		
Sold Dollar Volume (in millions)		\$114.6	\$121.3	5.8%	\$1,114.1	\$1,192.2	7.0%		
Average Sold/Ask Price Ratio		99.3%	98.2%	-1.1%	100.3%	99.6%	-0.7%		
Average Days on Market		36	49	35.9%	31	35	12.9%		
Median Days on Market		20	30	53.8%	10	18	80.0%		
Active Listings		526	820	55.9%	n/a	n/a	n/a		
Months of Supply		2.5	3.7	50.7%	n/a	n/a	n/a		

Single-Family Detached Market by Price Range



Townhome & Condo Market Overview

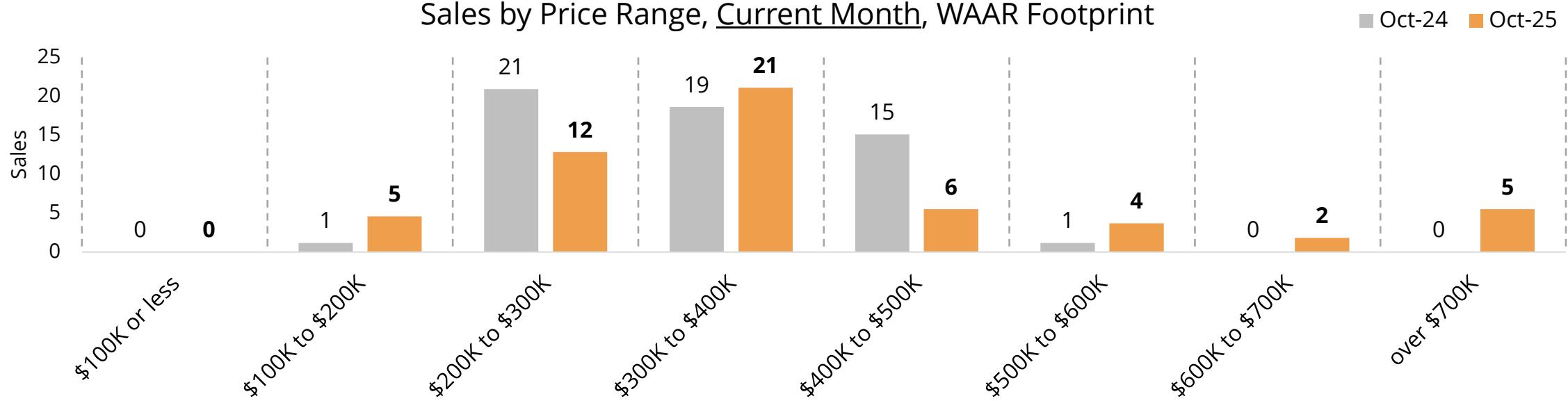


Key Metrics	2-year Trends			Oct-24	Oct-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Oct-23	Oct-24	Oct-25						
Sales		57	55	-3.5%	508	520	2.4%		
Pending Sales		48	41	-14.6%	374	407	8.8%		
New Listings		69	81	17.4%	555	703	26.7%		
Average List Price		\$354,253	\$364,076	2.8%	\$348,816	\$362,568	3.9%		
Average Sales Price		\$350,642	\$357,248	1.9%	\$348,324	\$358,362	2.9%		
Median Sales Price		\$355,000	\$315,000	-11.3%	\$345,000	\$335,555	-2.7%		
Average Price Per Square Foot		\$193	\$205	6.0%	\$197	\$208	5.5%		
Sold Dollar Volume (in millions)		\$20.0	\$19.6	-1.7%	\$177.1	\$186.3	5.1%		
Average Sold/Ask Price Ratio		98.8%	98.1%	-0.7%	100.0%	98.9%	-1.1%		
Average Days on Market		34	39	15.9%	28	34	20.5%		
Median Days on Market		22	26	18.2%	13	21	61.5%		
Active Listings		109	177	62.4%	n/a	n/a	n/a		
Months of Supply		2.1	3.4	61.6%	n/a	n/a	n/a		

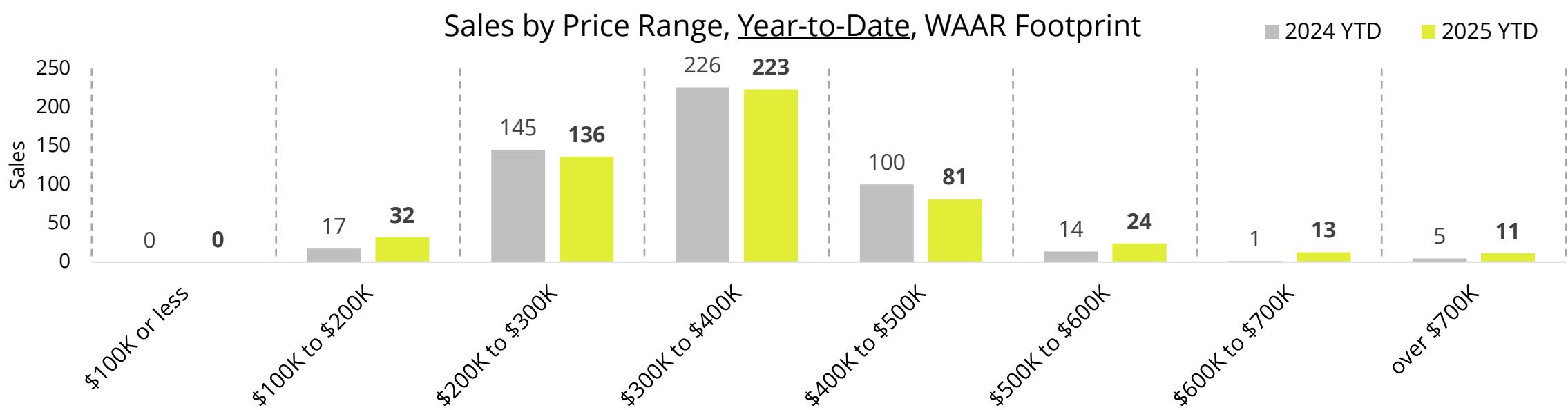
Townhome & Condo Market by Price Range



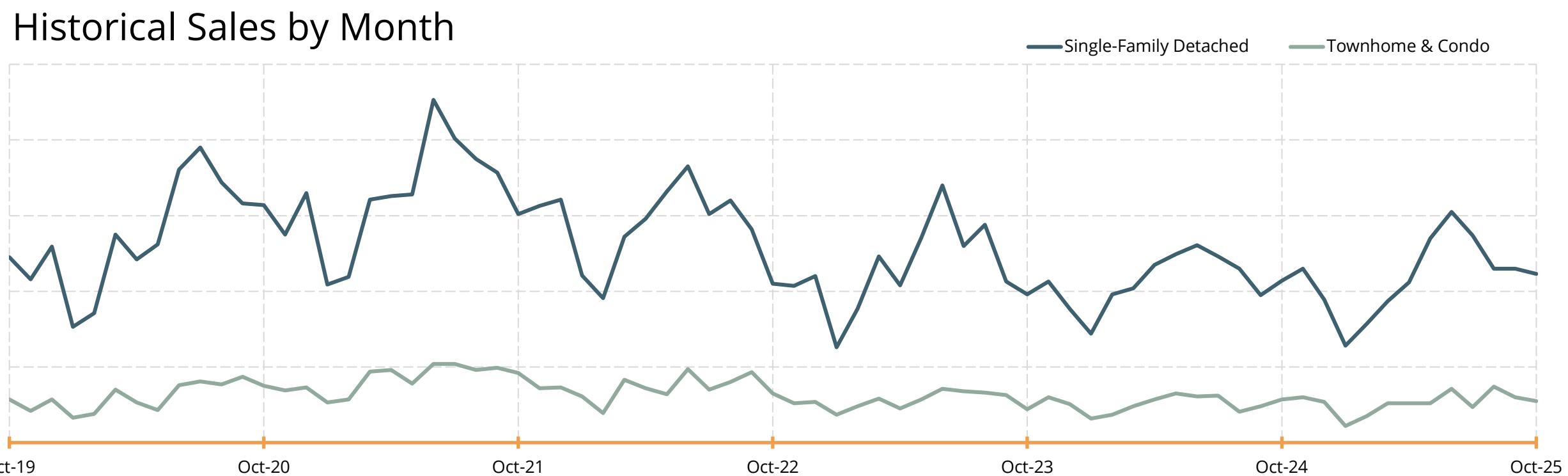
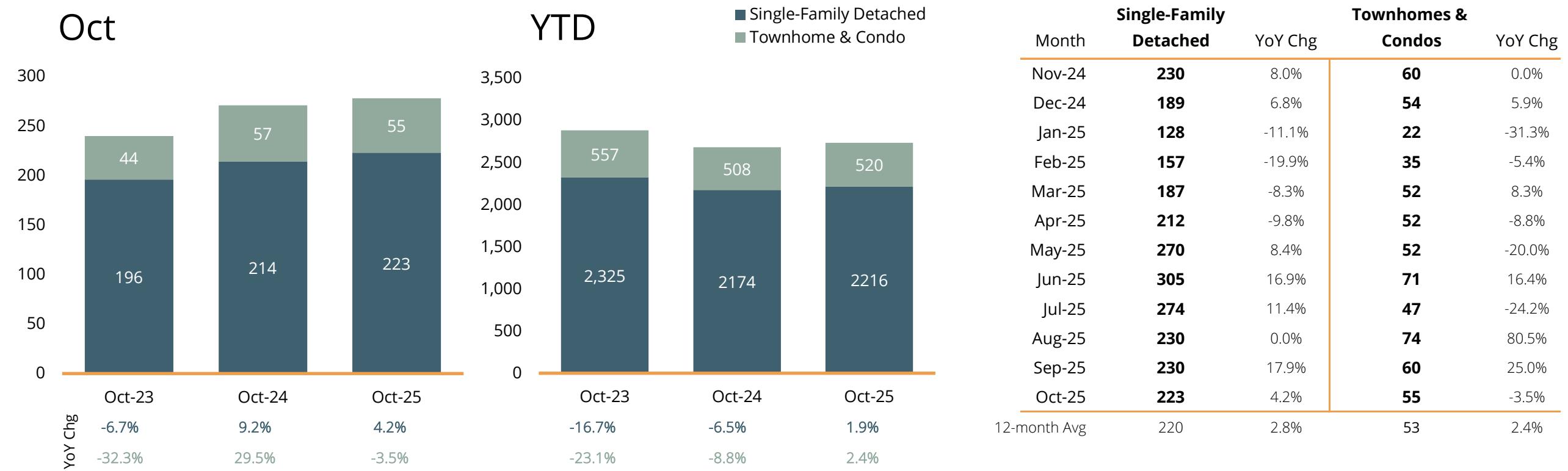
Sales by Price Range, Current Month, WAAR Footprint



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

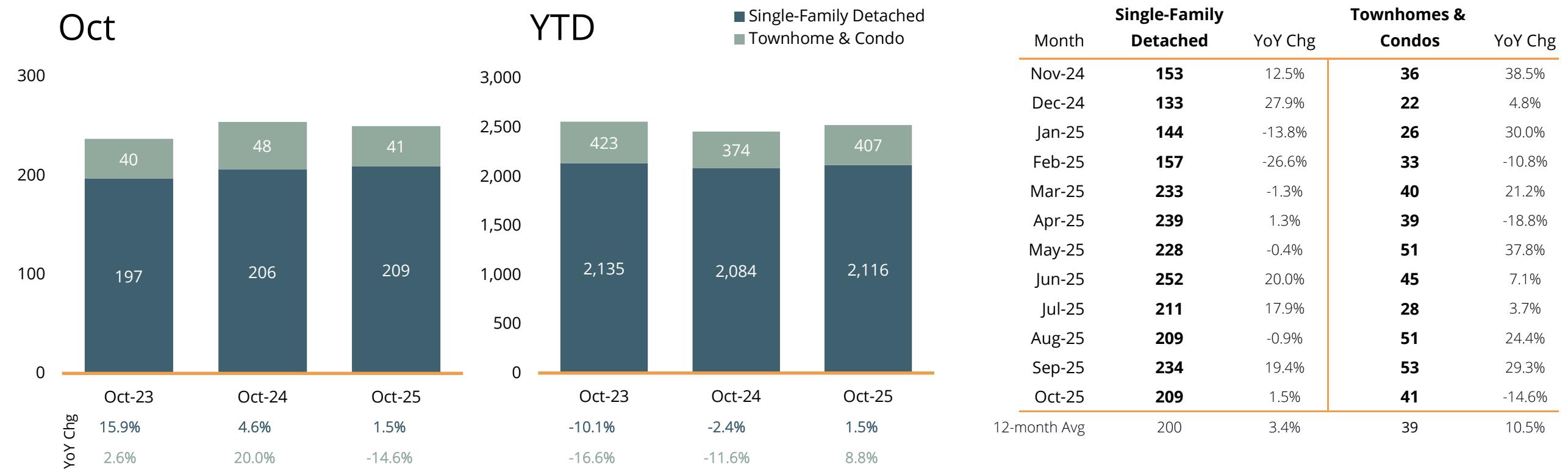


Sales

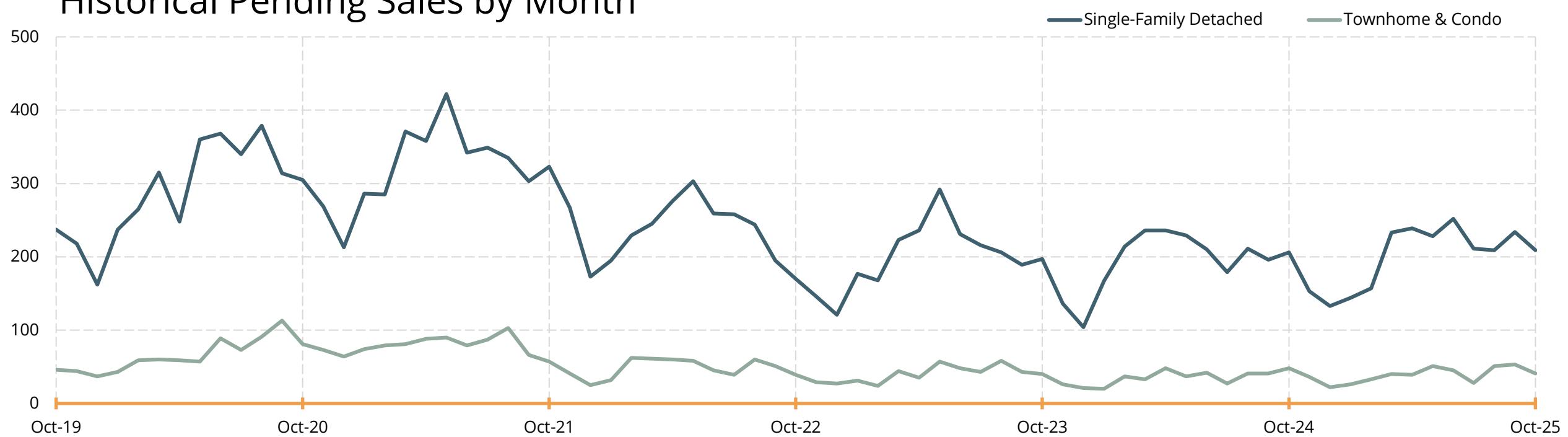


Source: Virginia REALTORS®, data accessed November 15, 2025

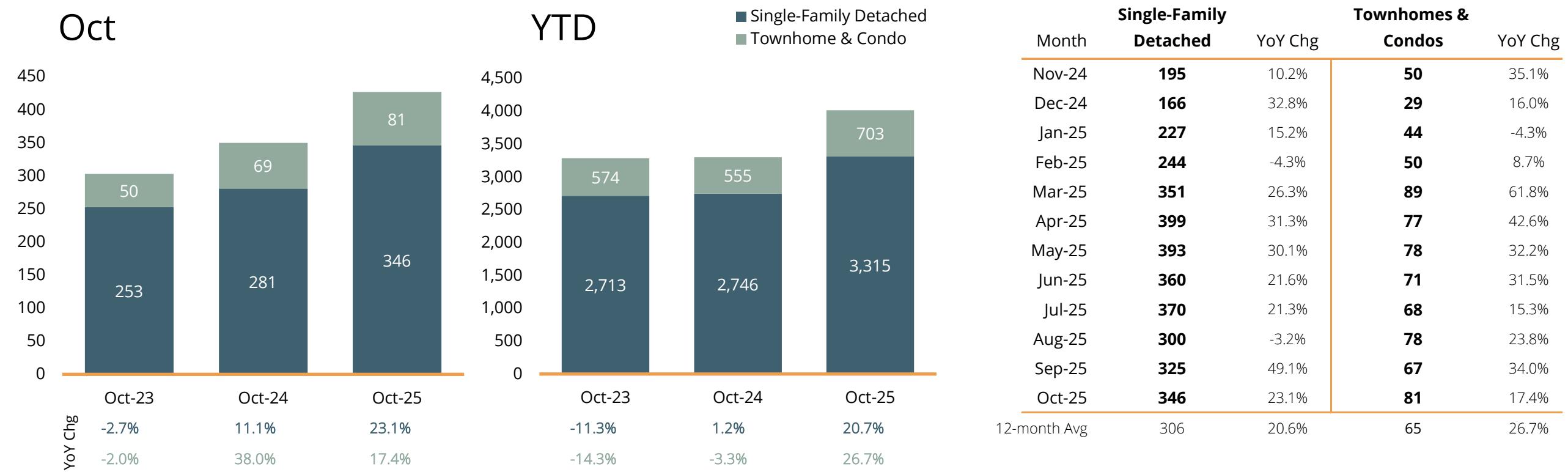
Pending Sales



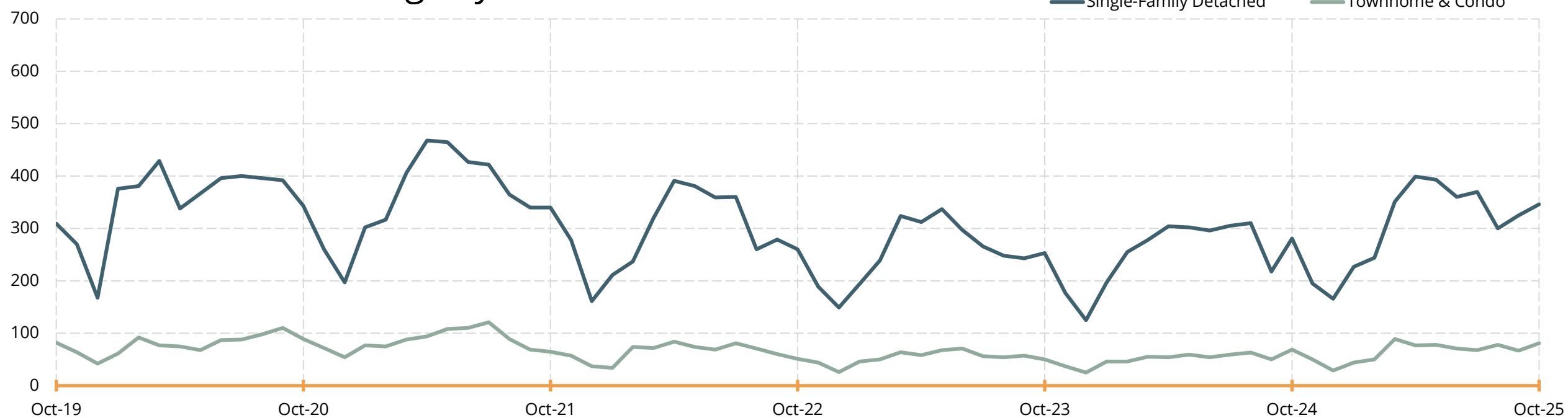
Historical Pending Sales by Month



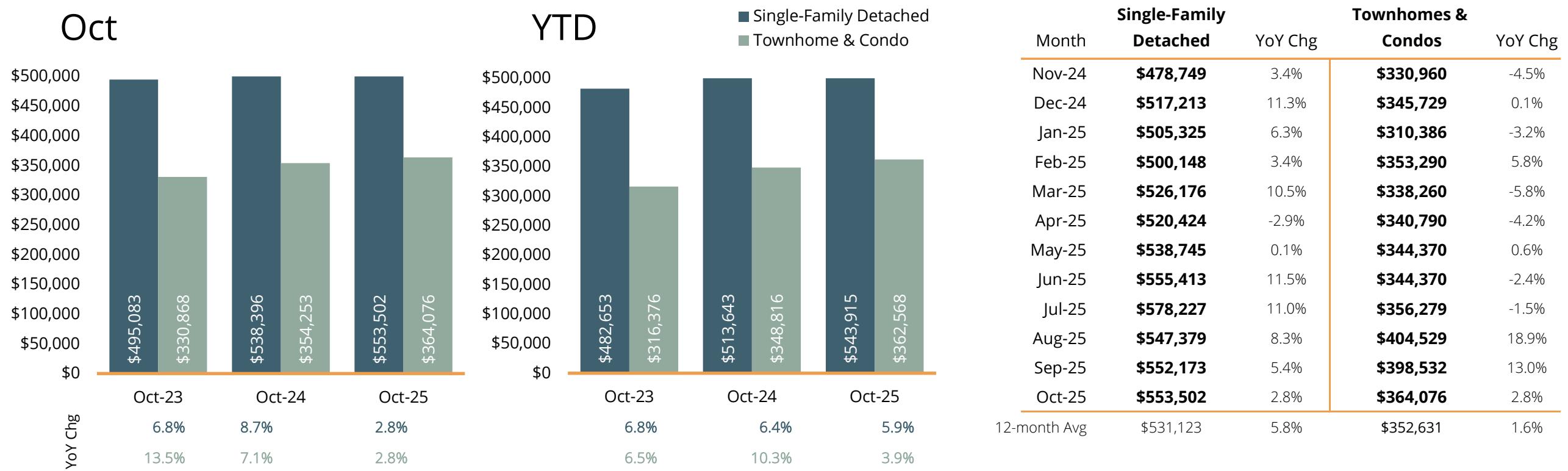
New Listings



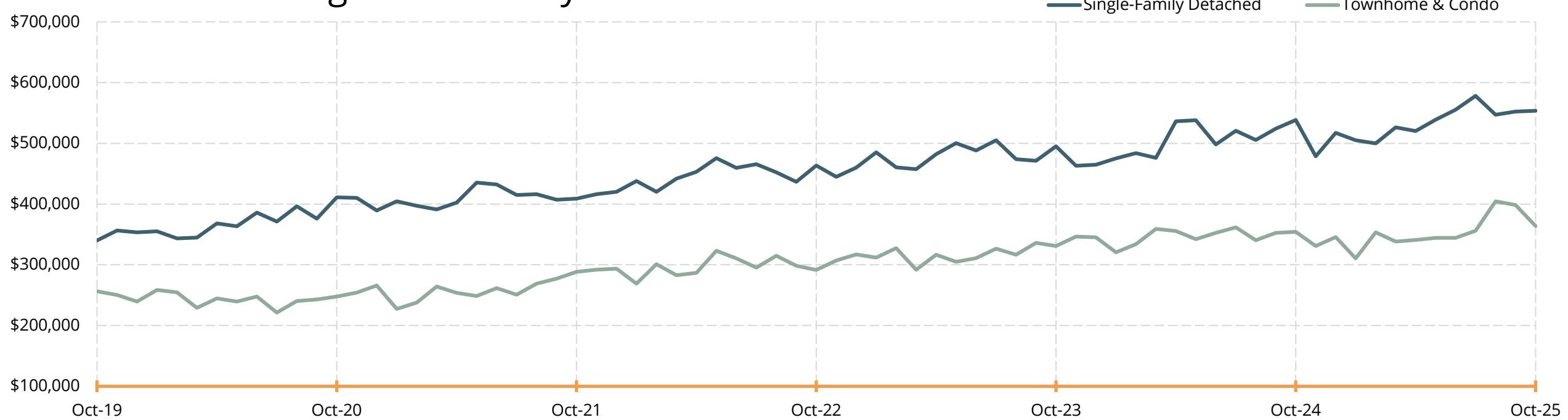
Historical New Listings by Month



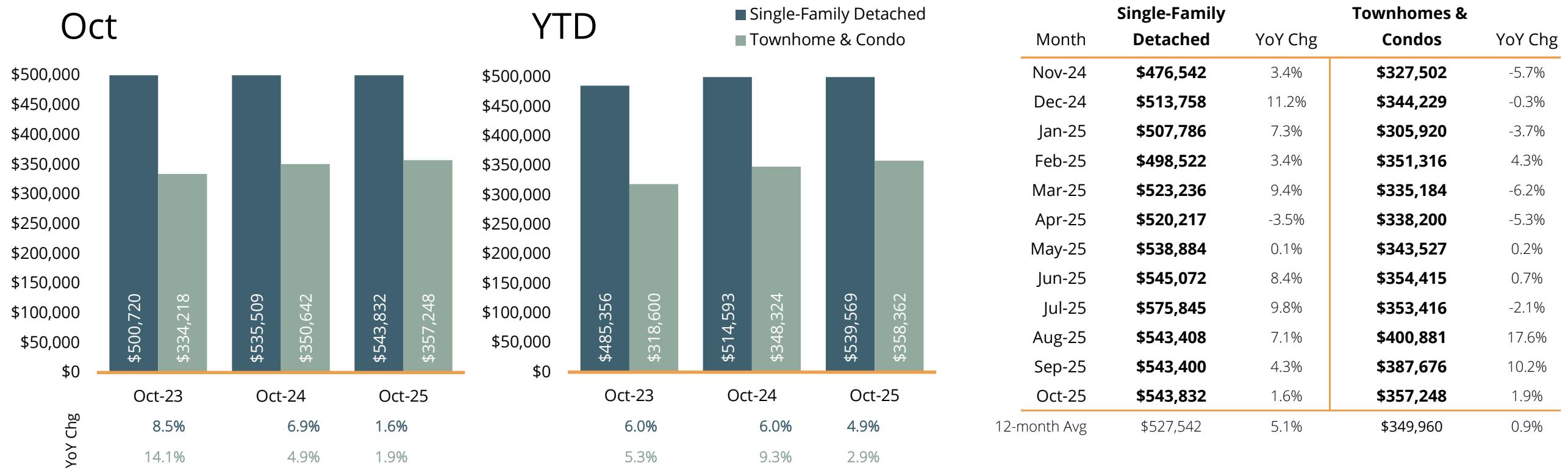
Average List Price



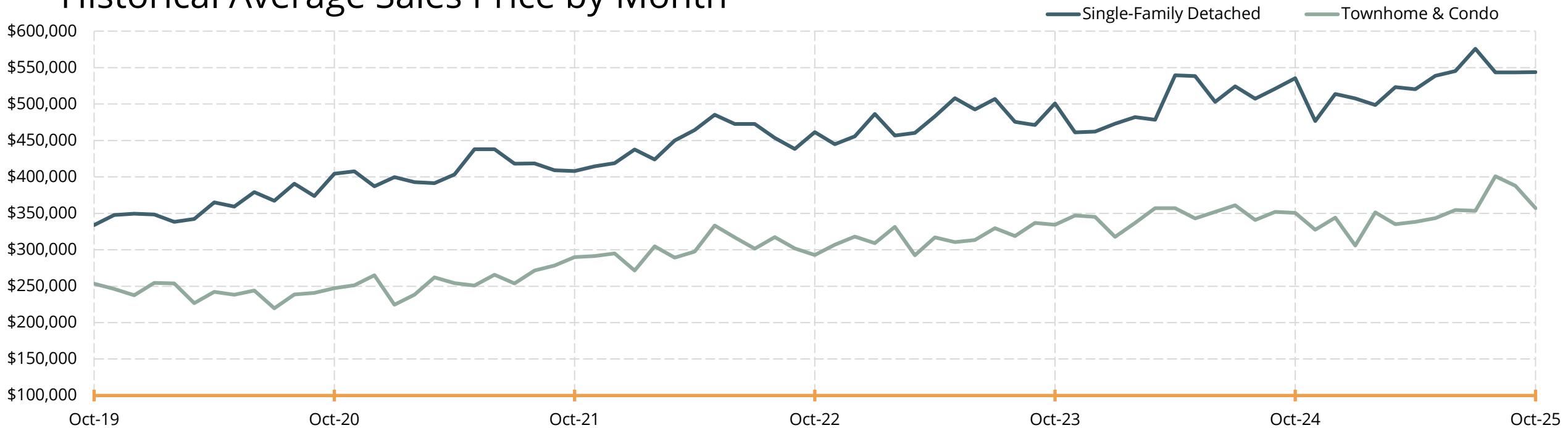
Historical Average List Price by Month



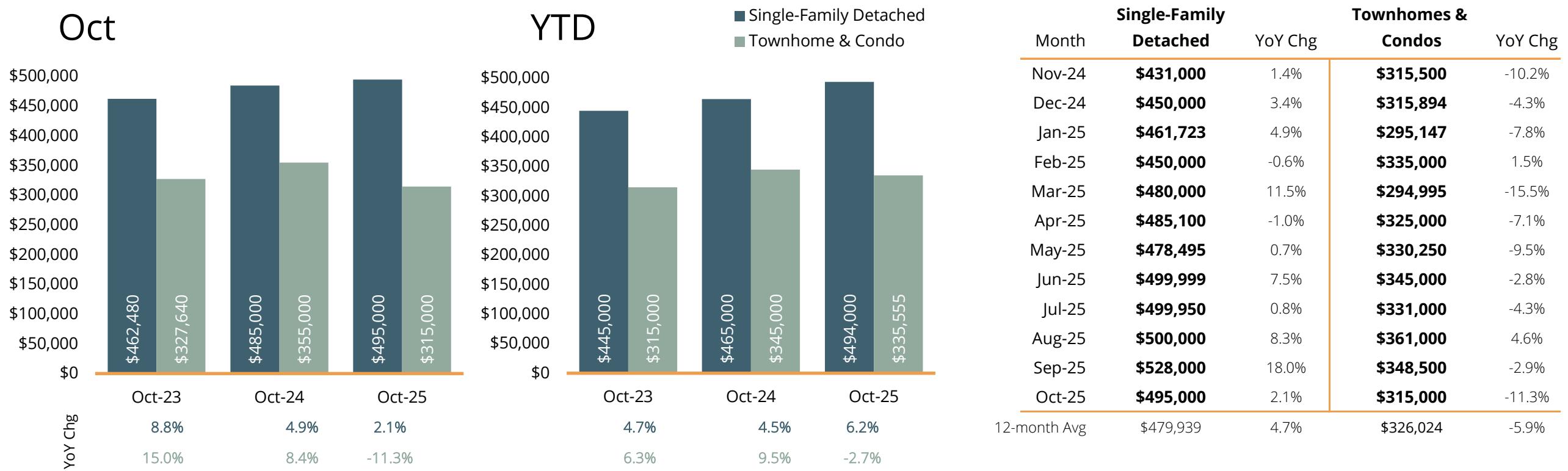
Average Sales Price



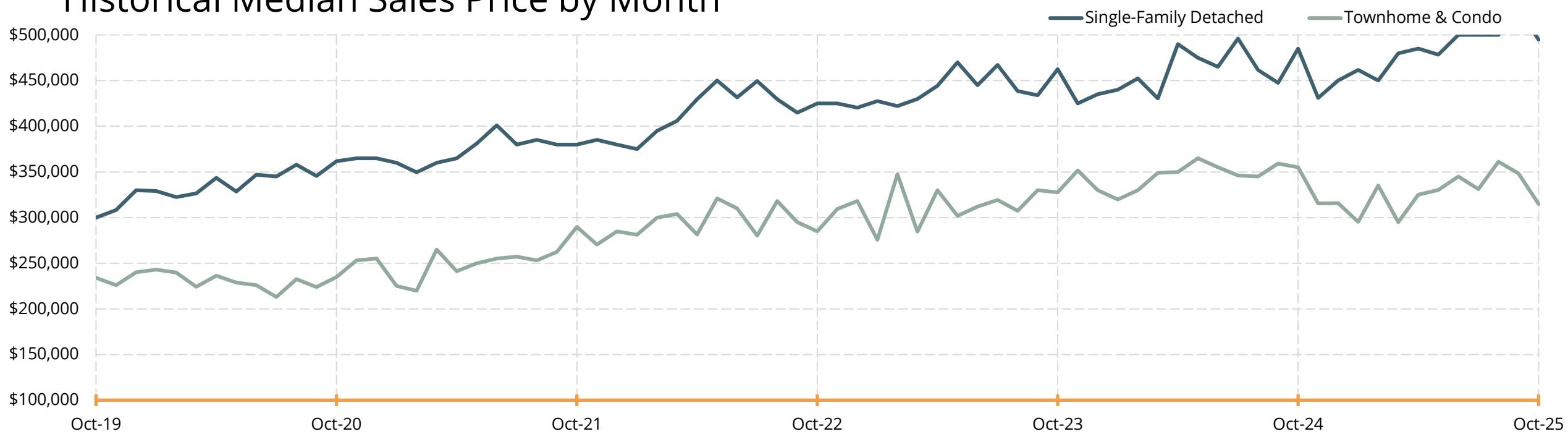
Historical Average Sales Price by Month



Median Sales Price



Historical Median Sales Price by Month

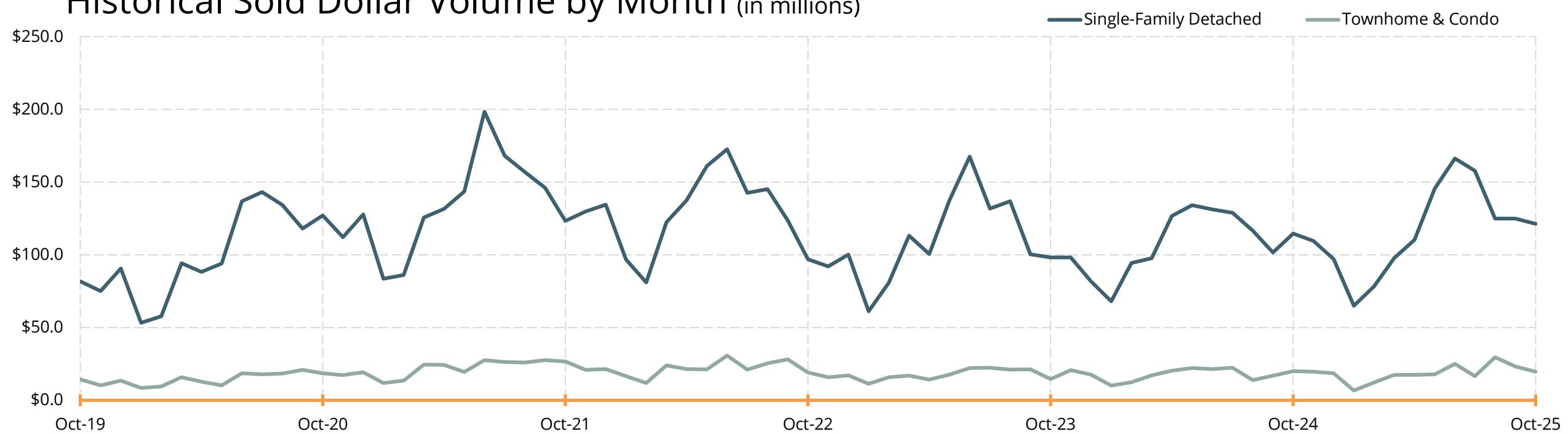


Sold Dollar Volume (in millions)

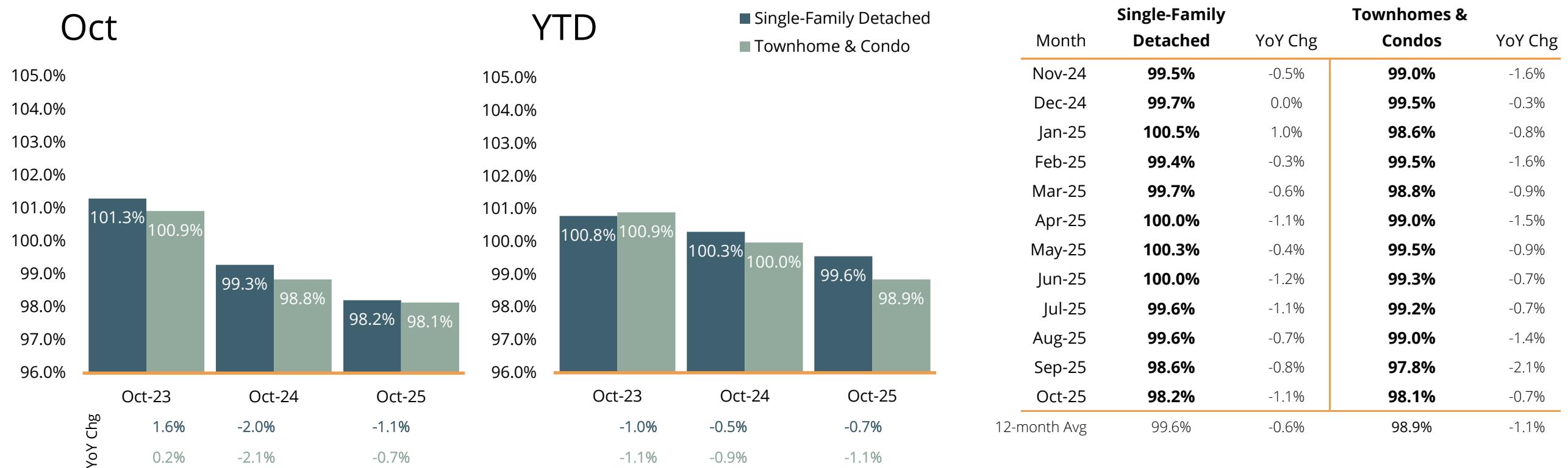


Oct	YTD			Single-Family Detached			Month	Single-Family Detached		Townhomes & Condos	
	Oct-23	Oct-24	Oct-25	Townhome & Condo	Single-Family Detached	YoY Chg		Oct-25	YoY Chg	Oct-25	YoY Chg
\$160.0				\$1,600.0			Nov-24	\$109.6	11.6%	\$19.7	-5.7%
\$140.0				\$1,400.0			Dec-24	\$97.1	18.7%	\$18.6	5.6%
\$120.0				\$1,200.0			Jan-25	\$65.0	-4.6%	\$6.7	-33.8%
\$100.0	\$14.7	\$20.0	\$19.6	\$1,000.0			Feb-25	\$78.3	-17.2%	\$12.3	-1.3%
\$80.0	\$98.1	\$114.6	\$121.3	\$600.0			Mar-25	\$97.8	0.3%	\$17.4	1.6%
\$60.0				\$400.0			Apr-25	\$110.3	-13.0%	\$17.6	-13.6%
\$40.0				\$200.0			May-25	\$145.5	8.5%	\$17.9	-19.8%
\$20.0				\$0.0			Jun-25	\$166.2	26.7%	\$25.2	17.2%
\$0.0							Jul-25	\$157.8	22.4%	\$16.6	-25.8%
	Oct-23	Oct-24	Oct-25		Oct-23	Oct-24	Aug-25	\$125.0	7.1%	\$29.7	112.3%
							Sep-25	\$125.0	23.0%	\$23.3	37.7%
YoY Chg	1.2%	16.8%	5.8%		-11.8%	-1.3%	Oct-25	\$121.3	5.8%	\$19.6	-1.7%
	-22.8%	35.9%	-1.7%		-19.0%	-0.4%				\$18.7	4.1%
							12-month Avg	\$116.6	8.1%		

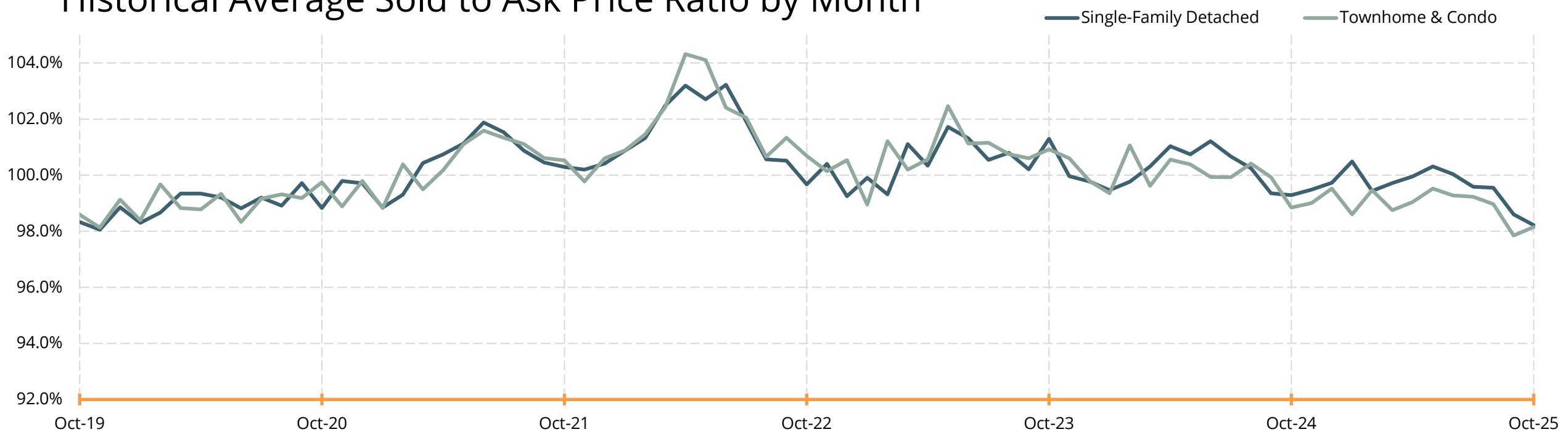
Historical Sold Dollar Volume by Month (in millions)



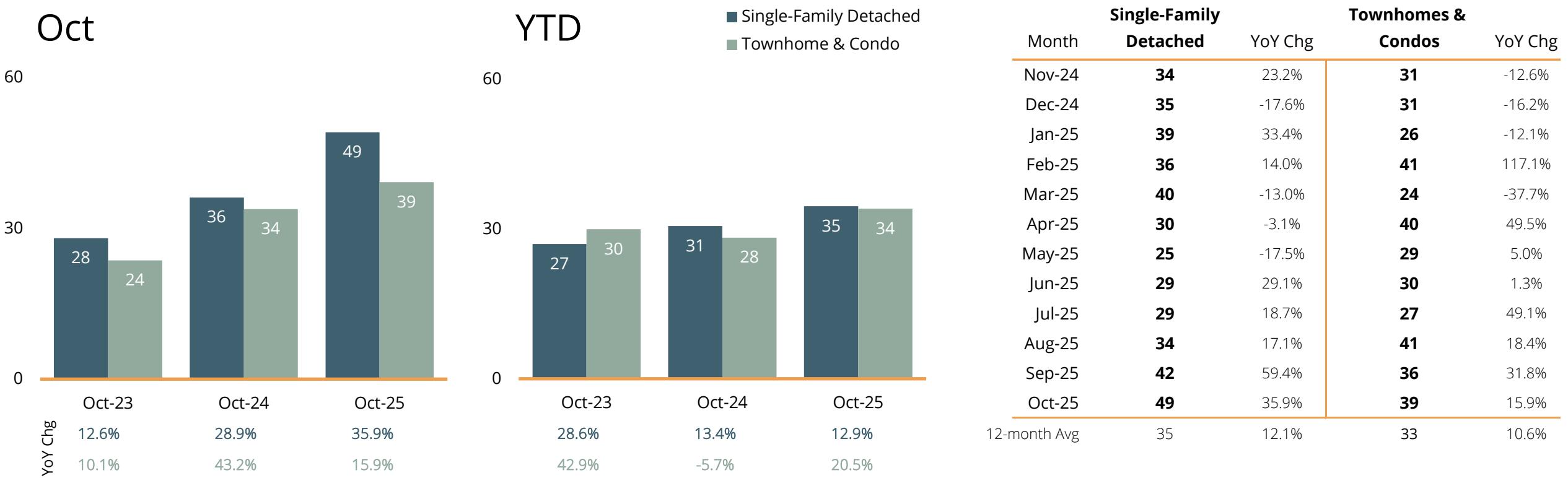
Average Sold to Ask Price Ratio



Historical Average Sold to Ask Price Ratio by Month



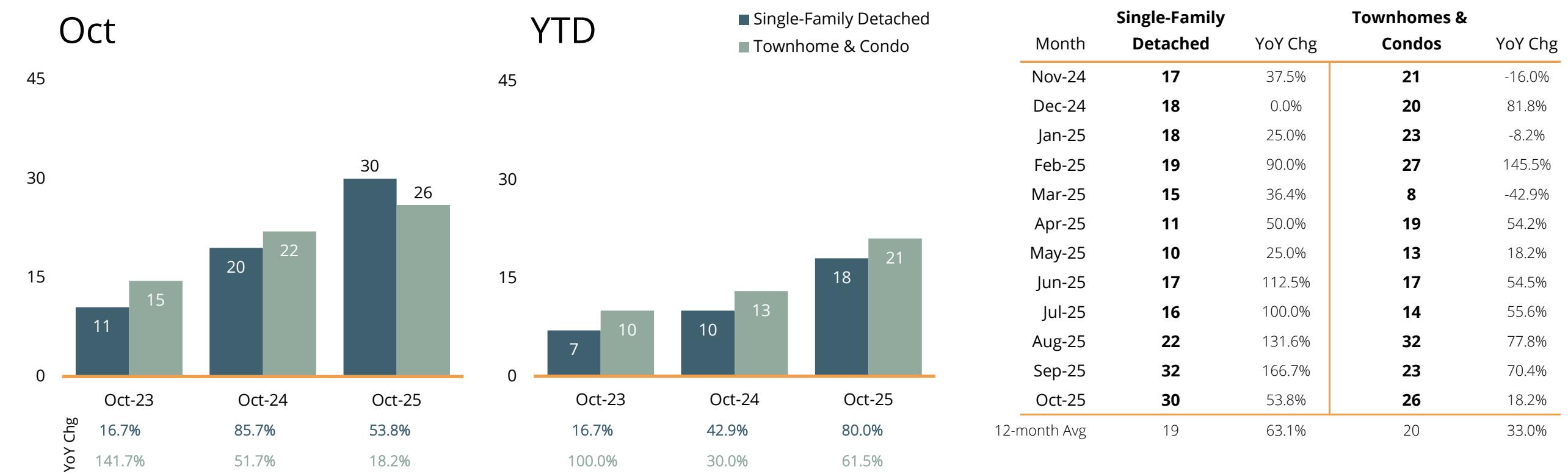
Average Days on Market



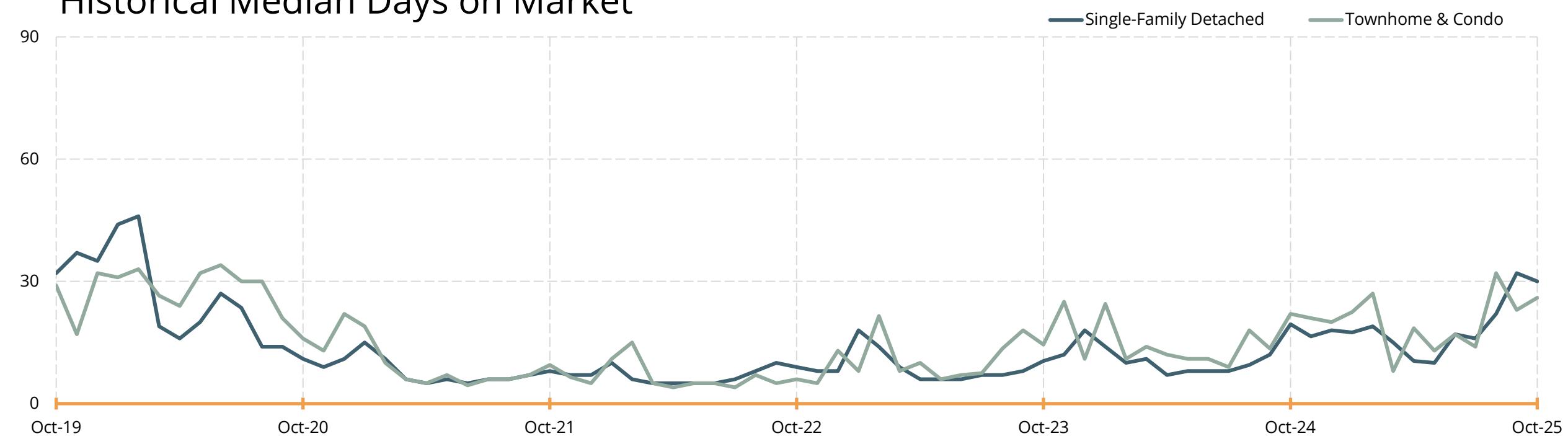
Historical Average Days on Market



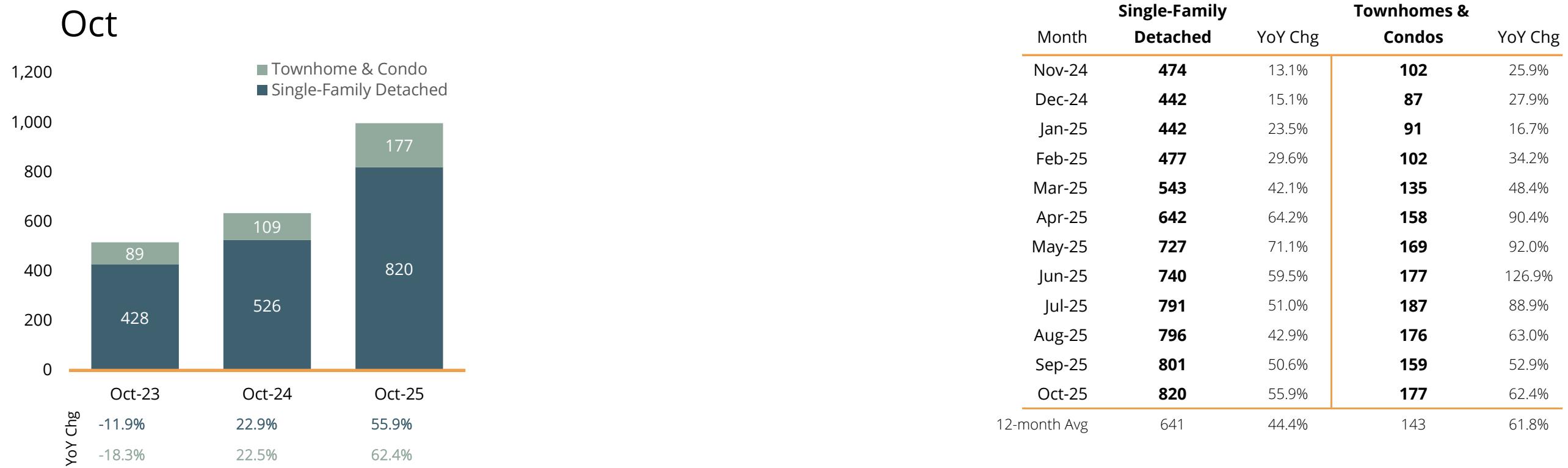
Median Days on Market



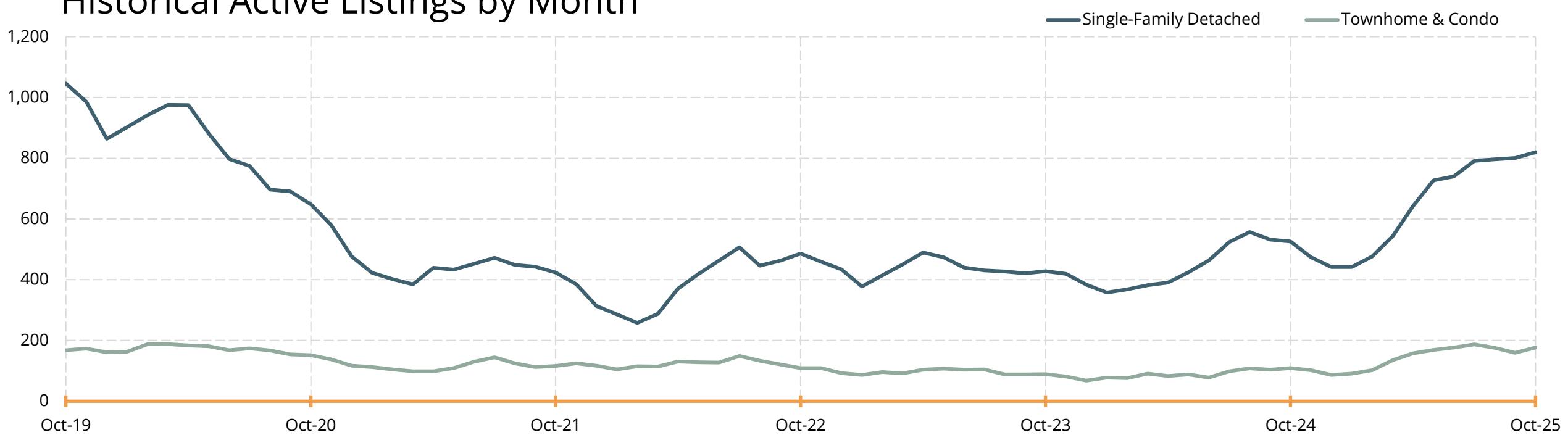
Historical Median Days on Market



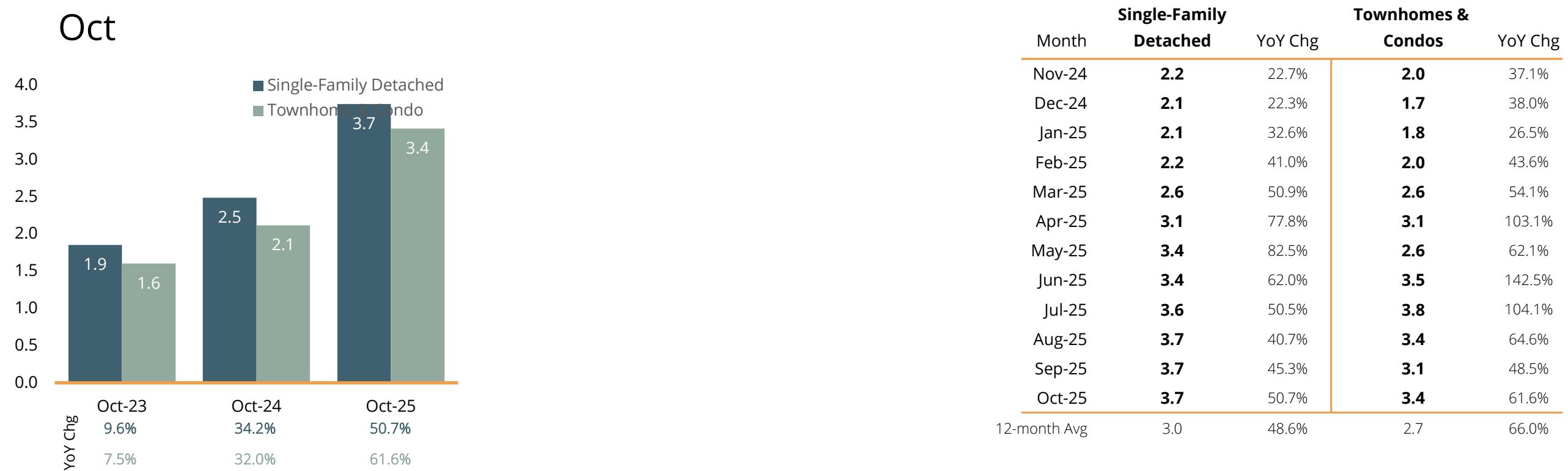
Active Listings



Historical Active Listings by Month

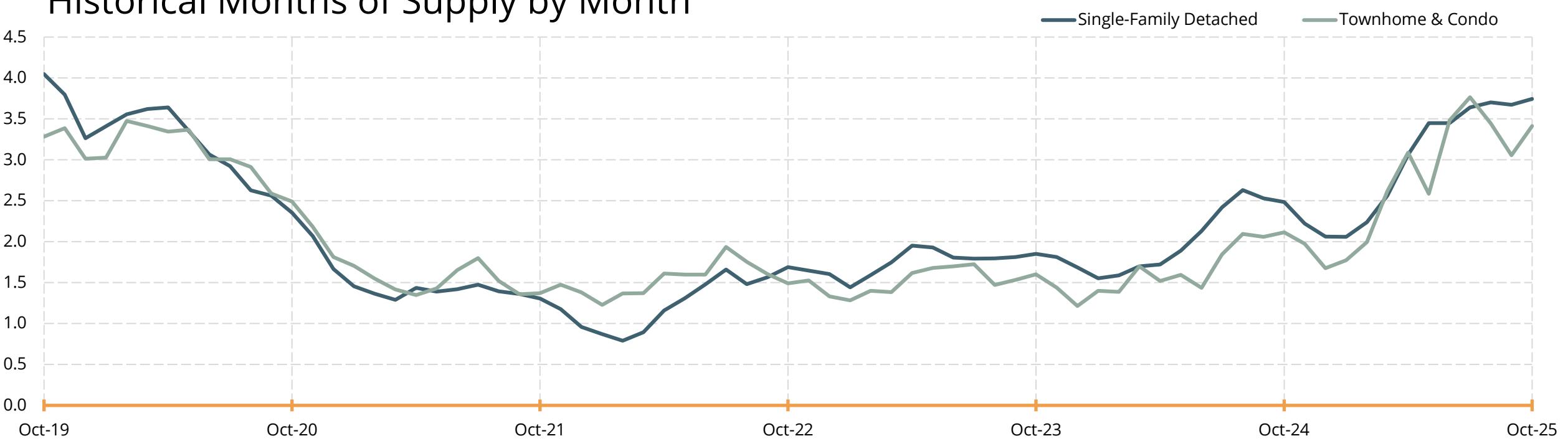


Months of Supply



Month	Single-Family Detached	YoY Chg	Townhomes & Condos	YoY Chg
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%
Oct-25	3.7	50.7%	3.4	61.6%
12-month Avg	3.0	48.6%	2.7	66.0%

Historical Months of Supply by Month



Area Overview - Total Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg
James City County	165	168	1.8%	117	135	15.4%	\$569,491	\$557,356	-2.1%	\$485,000	\$485,000	0.0%	283	430	51.9%	2.3	3.4	47.7%
Williamsburg	24	22	-8.3%	10	23	130.0%	\$362,500	\$448,689	23.8%	\$373,500	\$425,000	13.8%	40	87	117.5%	2.2	5.4	143.2%
York County	84	119	41.7%	88	84	-4.5%	\$448,667	\$469,529	4.6%	\$413,195	\$446,500	8.1%	166	264	59.0%	2.2	3.2	49.6%
New Kent County	67	114	70.1%	53	34	-35.8%	\$455,905	\$440,438	-3.4%	\$375,000	\$429,245	14.5%	134	208	55.2%	3.2	5.0	54.3%
Charles City County	10	4	-60.0%	3	2	-33.3%	\$228,136	\$472,500	107.1%	\$239,900	\$472,500	97.0%	12	8	-33.3%	3.5	1.9	-45.3%

Area Overview - Total Market YTD



New Listings YTD				Sales YTD				Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	
James City County	1,595	1,905	19.4%	1,262	1,291	2.3%	\$523,095	\$540,826	3.4%	\$450,900	\$485,000	7.6%	283	430	51.9%	
Williamsburg	229	267	16.6%	170	157	-7.6%	\$431,616	\$459,799	6.5%	\$398,000	\$410,000	3.0%	40	87	117.5%	
York County	870	1,064	22.3%	808	827	2.4%	\$455,162	\$478,544	5.1%	\$420,083	\$450,000	7.1%	166	264	59.0%	
New Kent County	552	733	32.8%	403	424	5.2%	\$460,397	\$475,019	3.2%	\$416,000	\$445,000	7.0%	134	208	55.2%	
Charles City County	55	49	-10.9%	39	37	-5.1%	\$303,799	\$427,693	40.8%	\$280,000	\$330,000	17.9%	12	8	-33.3%	

Area Overview - Single Family Detached Market



New Listings				Sales				Average Sales Price			Median Sales Price			Active Listings			Months Supply		
Geography	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	
James City County	128	127	-0.8%	95	109	14.7%	\$616,167	\$594,286	-3.6%	\$520,000	\$495,000	-4.8%	225	340	51.1%	2.3	3.4	51.2%	
Williamsburg	13	14	7.7%	7	15	114.3%	\$395,143	\$510,694	29.2%	\$410,000	\$599,000	46.1%	20	53	165.0%	1.8	5.0	183.8%	
York County	73	92	26.0%	66	66	0.0%	\$480,234	\$512,485	6.7%	\$487,500	\$502,000	3.0%	148	222	50.0%	2.4	3.3	35.0%	
New Kent County	57	109	91.2%	43	31	-27.9%	\$486,445	\$453,803	-6.7%	\$415,000	\$435,000	4.8%	121	197	62.8%	3.2	5.2	60.3%	
Charles City County	10	4	-60.0%	3	2	-33.3%	\$228,136	\$472,500	107.1%	\$239,900	\$472,500	97.0%	12	8	-33.3%	3.5	1.9	-45.3%	

Area Overview - Single Family Detached Market YTD



New Listings YTD				Sales YTD				Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	
James City County	1,314	1,525	16.1%	1,019	1,011	-0.8%	\$562,097	\$584,755	4.0%	\$489,012	\$530,750	8.5%	225	340	51.1%	
Williamsburg	149	179	20.1%	107	105	-1.9%	\$492,337	\$514,262	4.5%	\$450,000	\$465,000	3.3%	20	53	165.0%	
York County	729	880	20.7%	641	676	5.5%	\$483,877	\$511,038	5.6%	\$460,000	\$489,900	6.5%	148	222	50.0%	
New Kent County	499	682	36.7%	368	387	5.2%	\$475,107	\$489,043	2.9%	\$436,350	\$460,000	5.4%	121	197	62.8%	
Charles City County	55	49	-10.9%	39	37	-5.1%	\$303,799	\$427,693	40.8%	\$280,000	\$330,000	17.9%	12	8	-33.3%	

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg
James City County	37	41	10.8%	22	26	18.2%	\$367,933	\$402,531	9.4%	\$367,495	\$305,175	-17.0%	58	90	55.2%	2.4	3.2	35.1%
Williamsburg	11	8	-27.3%	3	8	166.7%	\$286,333	\$332,428	16.1%	\$259,000	\$295,500	14.1%	20	34	70.0%	2.9	6.0	105.0%
York County	11	27	145.5%	22	18	-18.2%	\$353,967	\$312,022	-11.8%	\$364,500	\$316,000	-13.3%	18	42	133.3%	1.1	3.0	165.5%
New Kent County	10	5	-50.0%	10	3	-70.0%	\$324,579	\$302,333	-6.9%	\$338,490	\$301,000	-11.1%	13	11	-15.4%	3.1	2.8	-8.2%
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	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	Oct-24	Oct-25	% chg	
James City County	281	380	35.2%	243	280	15.2%	\$359,120	\$380,911	6.1%	\$350,000	\$360,000	2.9%	58	90	55.2%	
Williamsburg	80	88	10.0%	63	52	-17.5%	\$334,269	\$351,921	5.3%	\$349,000	\$312,500	-10.5%	20	34	70.0%	
York County	141	184	30.5%	167	151	-9.6%	\$346,045	\$324,872	-6.1%	\$355,500	\$325,000	-8.6%	18	42	133.3%	
New Kent County	53	51	-3.8%	35	37	5.7%	\$312,895	\$328,334	4.9%	\$312,995	\$325,500	4.0%	13	11	-15.4%	
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.