

OCTOBER
2025

WAARWILLIAMSBURG

MARKET INDICATORS REPORT

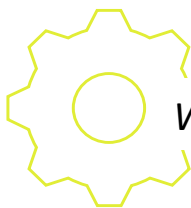
CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

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%).



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

INTEREST RATE TRACKER



Report Index



Market Activity - WAAR Footprint -----	4
Total Market Overview -----	5
Total Market by Price Range Overview -----	6
Single-Family Detached Market Overview -----	7
Single-Family Detached Market by Price Range Overview -----	8
Townhome & Condo Market Overview -----	9
Townhome & Condo Market by Price Range Overview -----	10
Sales -----	11
Pending Sales -----	12
New Listings -----	13
Average List Price -----	14
Average Sales Price -----	15
Median Sales Price -----	16
Sold Dollar Volume -----	17
Average Sold to Ask Price Ratio -----	18
Average Days on Market -----	19
Median Days on Market -----	20
Active Listings -----	21
Months of Supply -----	22
Area Overview - Total Market -----	23
Area Overview - Total Market YTD -----	24
Area Overview - Single-Family Detached Market -----	25
Area Overview - Single-Family Detached Market YTD -----	26
Area Overview - Townhome & Condo Market -----	27

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.

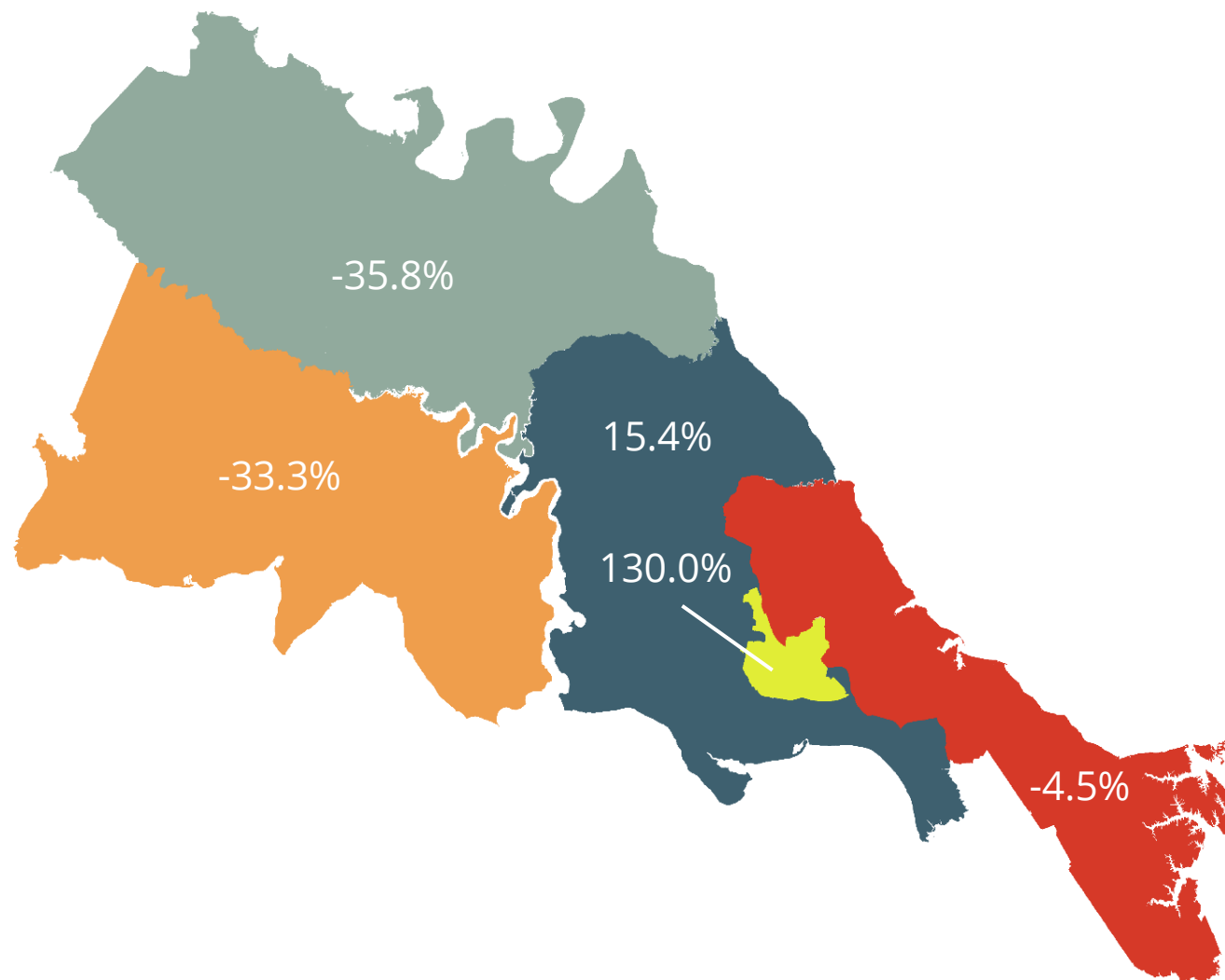
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



<i>Jurisdiction</i>	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



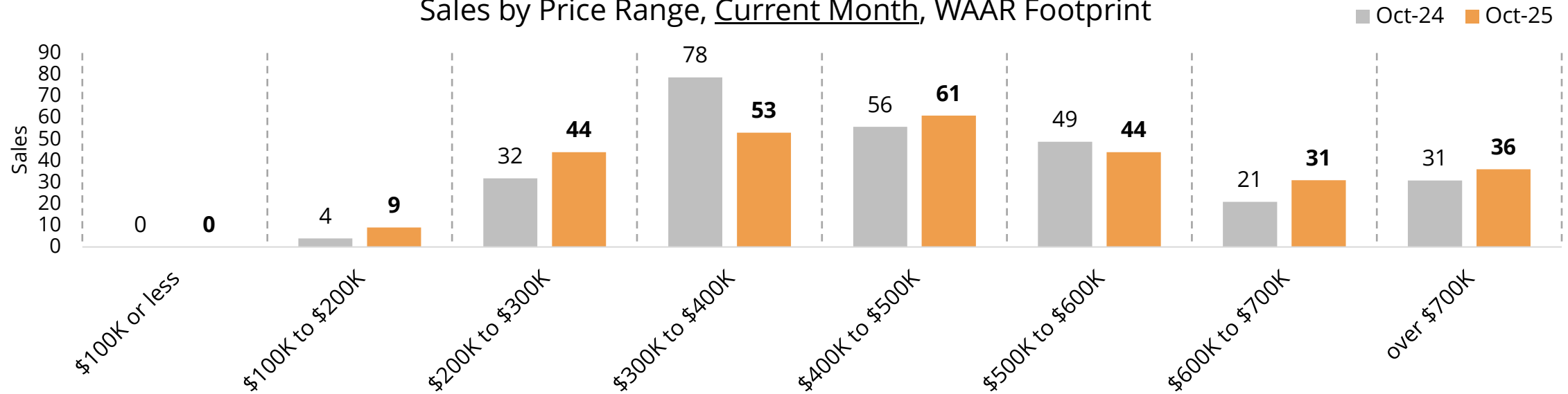
Key Metrics	Oct-23	2-year Trends	Oct-25	Oct-24	Oct-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
Sales				271	278	2.6%	2,682	2,736	2.0%
Pending Sales				254	250	-1.6%	2,458	2,523	2.6%
New Listings				350	427	22.0%	3,301	4,018	21.7%
Average List Price				\$499,665	\$516,026	3.3%	\$482,358	\$509,983	5.7%
Average 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

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

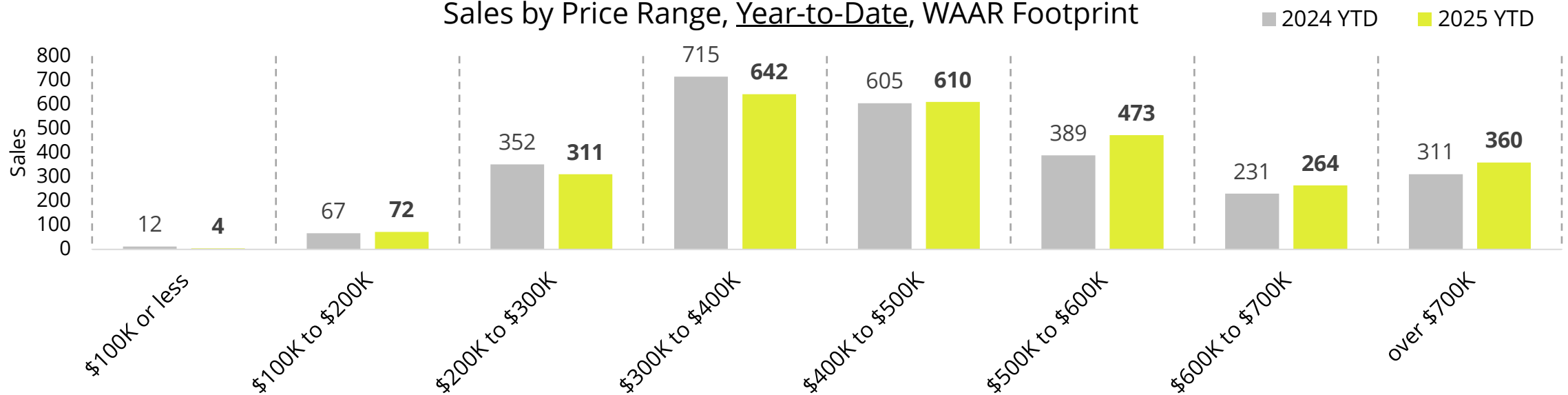
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Single-Family Detached Market Overview

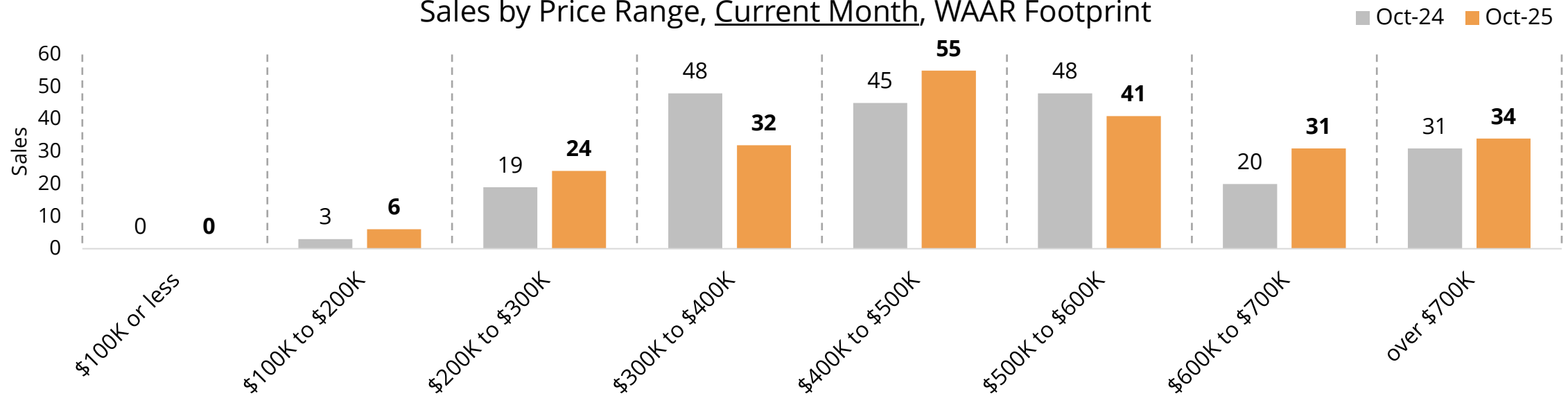


Key Metrics	Oct-23	2-year Trends	Oct-25	Oct-24	Oct-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
Sales				214	223	4.2%	2,174	2,216	1.9%
Pending Sales				206	209	1.5%	2,084	2,116	1.5%
New Listings				281	346	23.1%	2,746	3,315	20.7%
Average List Price				\$538,396	\$553,502	2.8%	\$513,643	\$543,915	5.9%
Average 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

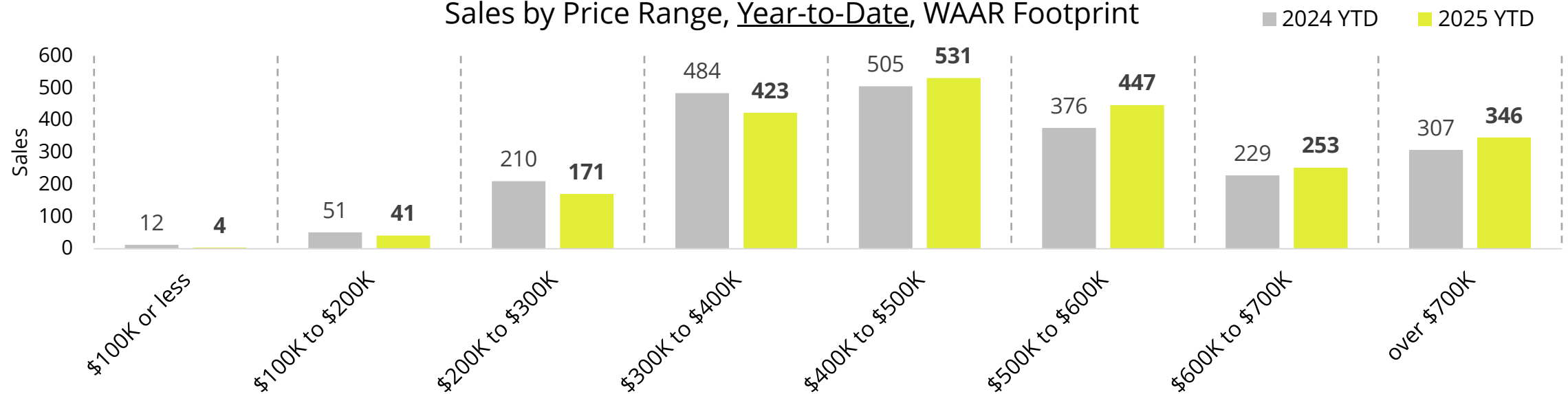
Single-Family Detached Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Townhome & Condo Market Overview



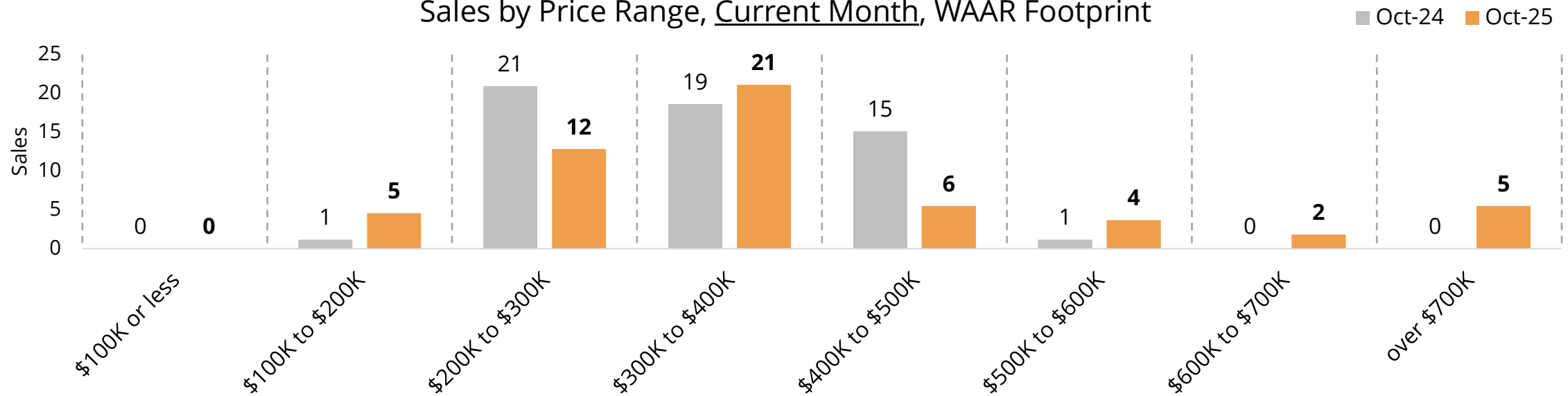
Key Metrics	Oct-23	2-year Trends	Oct-25	Oct-24	Oct-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
Sales				57	55	-3.5%	508	520	2.4%
Pending Sales				48	41	-14.6%	374	407	8.8%
New Listings				69	81	17.4%	555	703	26.7%
Average List Price				\$354,253	\$364,076	2.8%	\$348,816	\$362,568	3.9%
Average Sales Price				\$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

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

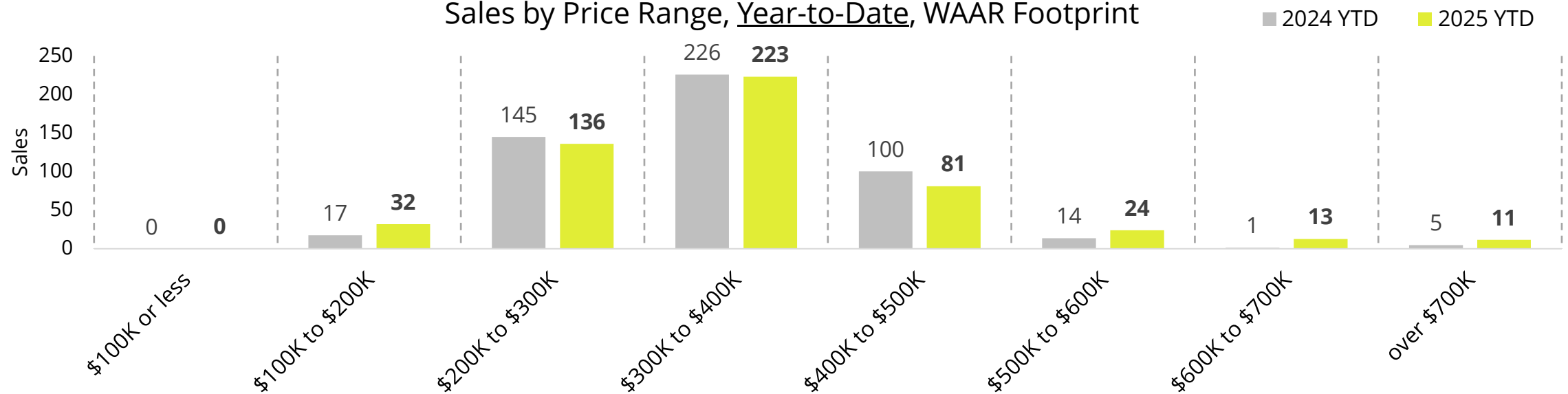
Townhome & Condo Market by Price Range



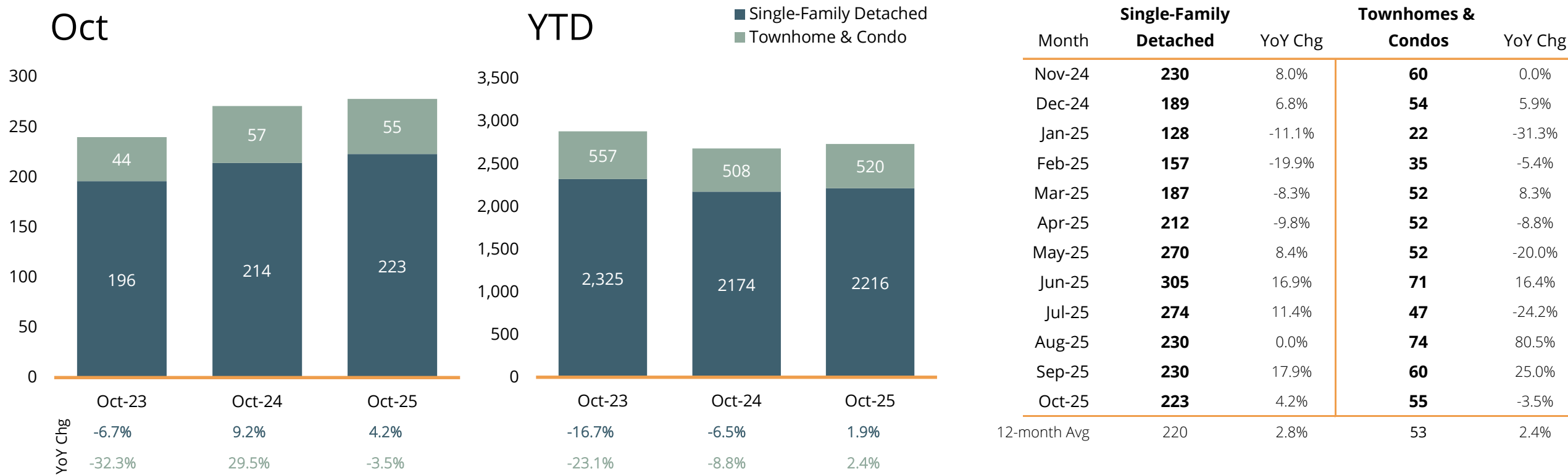
Sales by Price Range, Current Month, WAAR Footprint



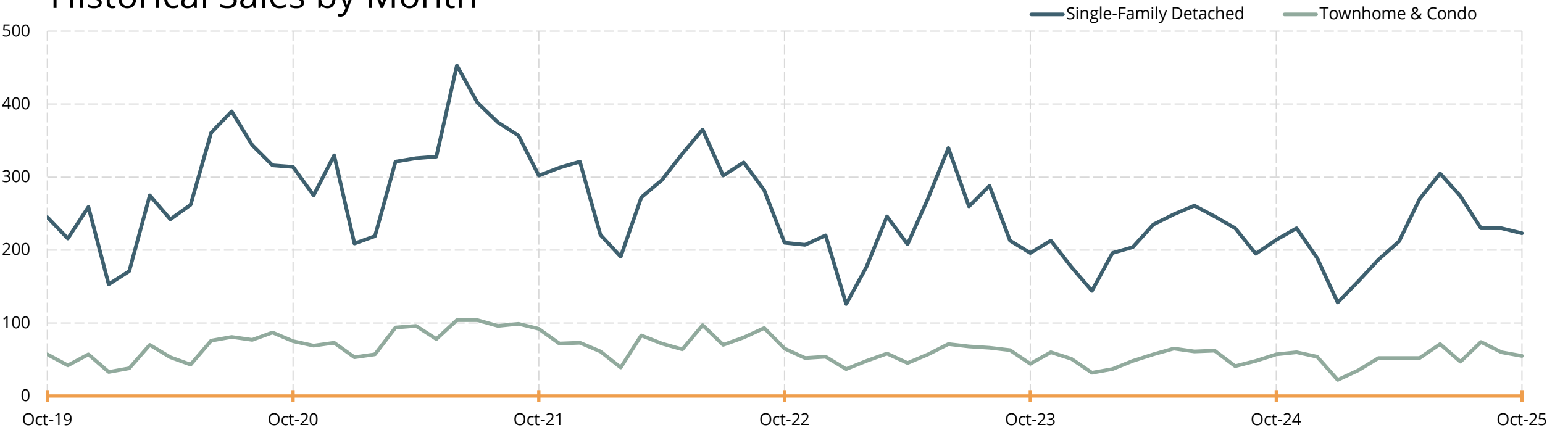
Sales by Price Range, Year-to-Date, WAAR Footprint



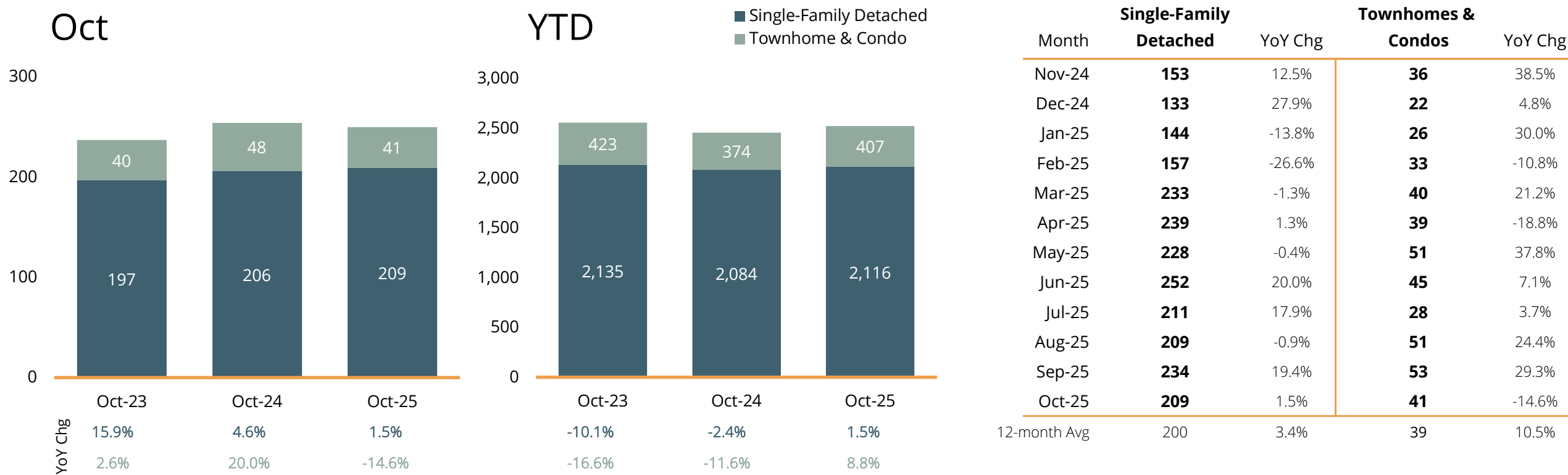
Sales



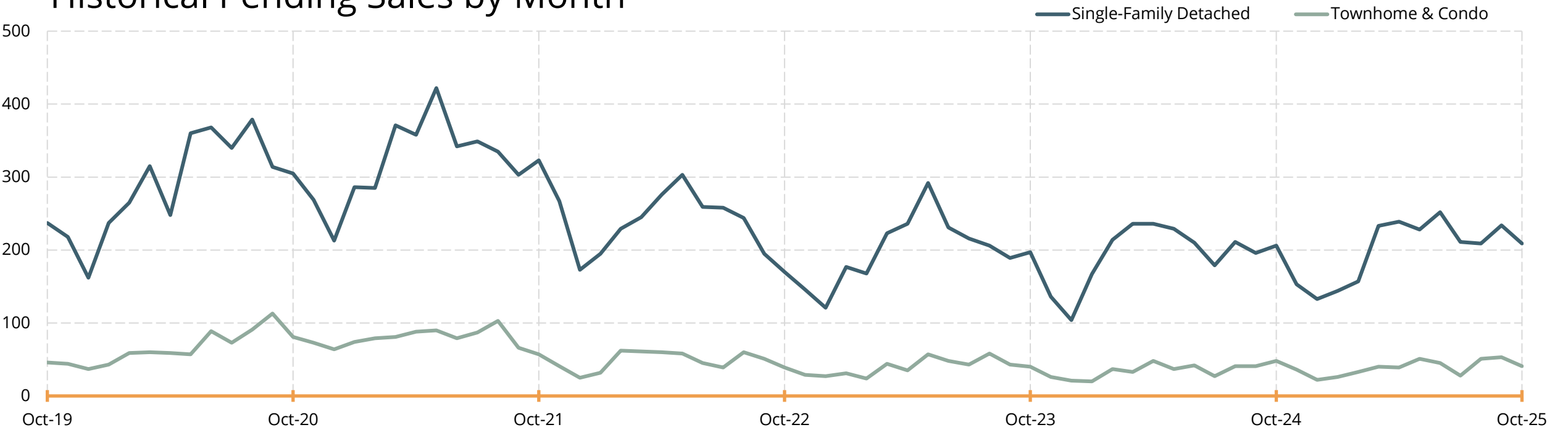
Historical Sales by Month



Pending Sales

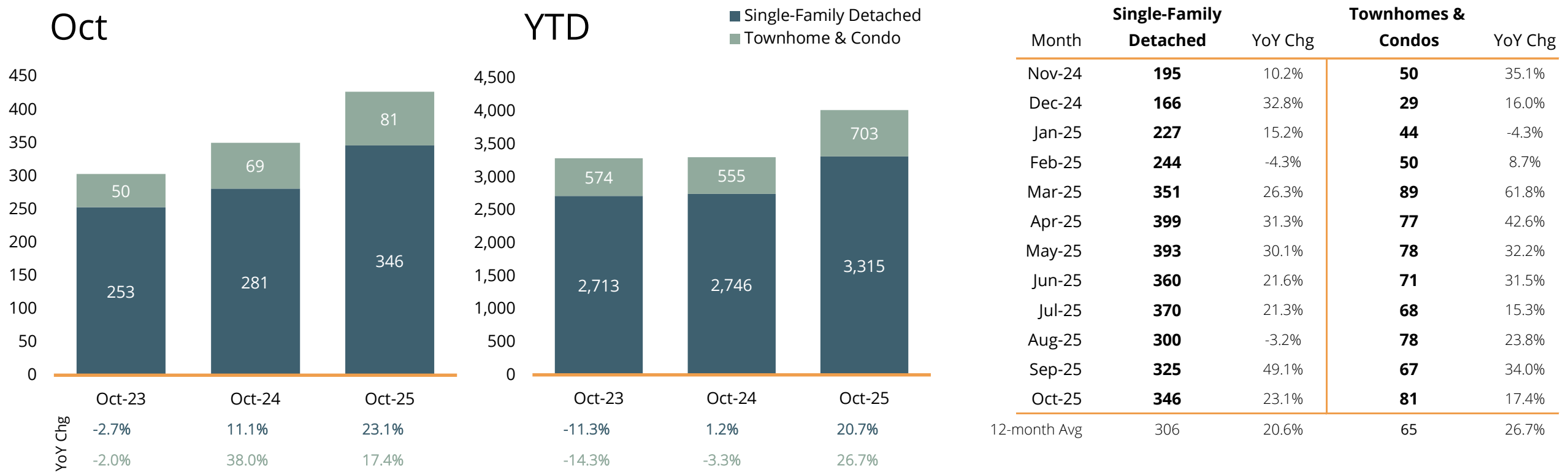


Historical Pending Sales by Month

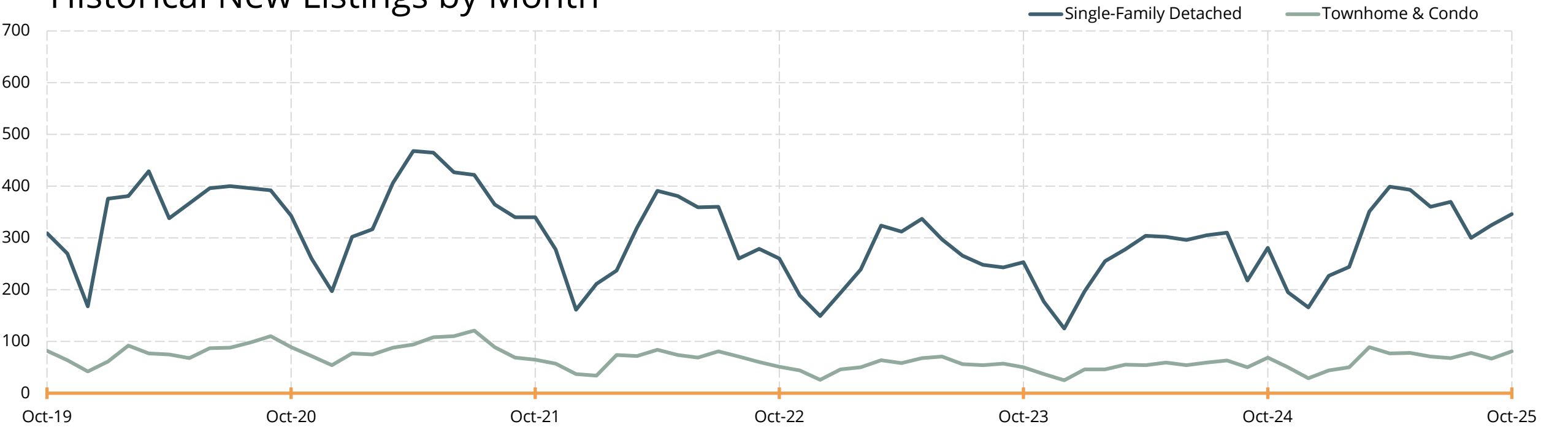


Source: Virginia REALTORS®, data accessed November 15, 2025

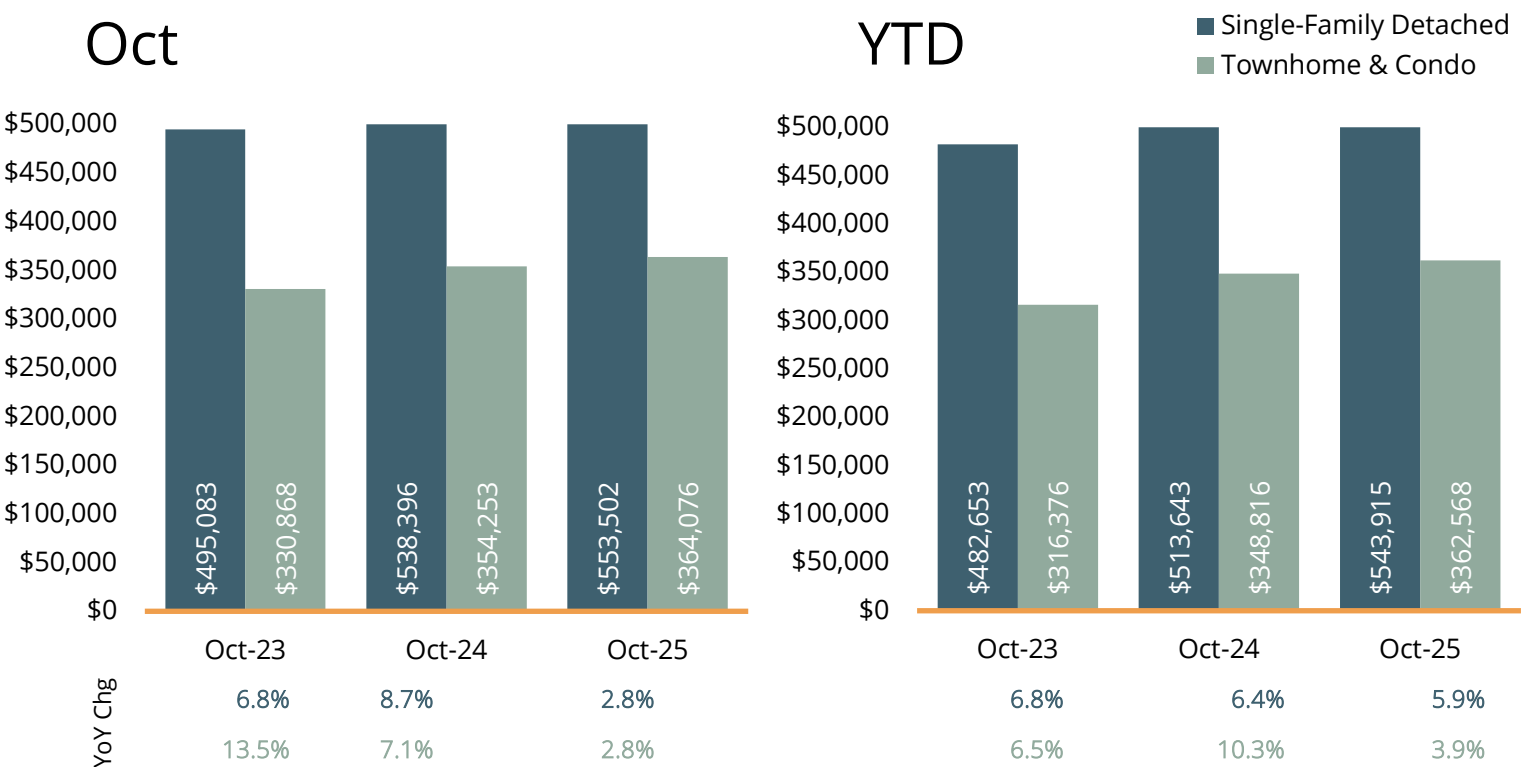
New Listings



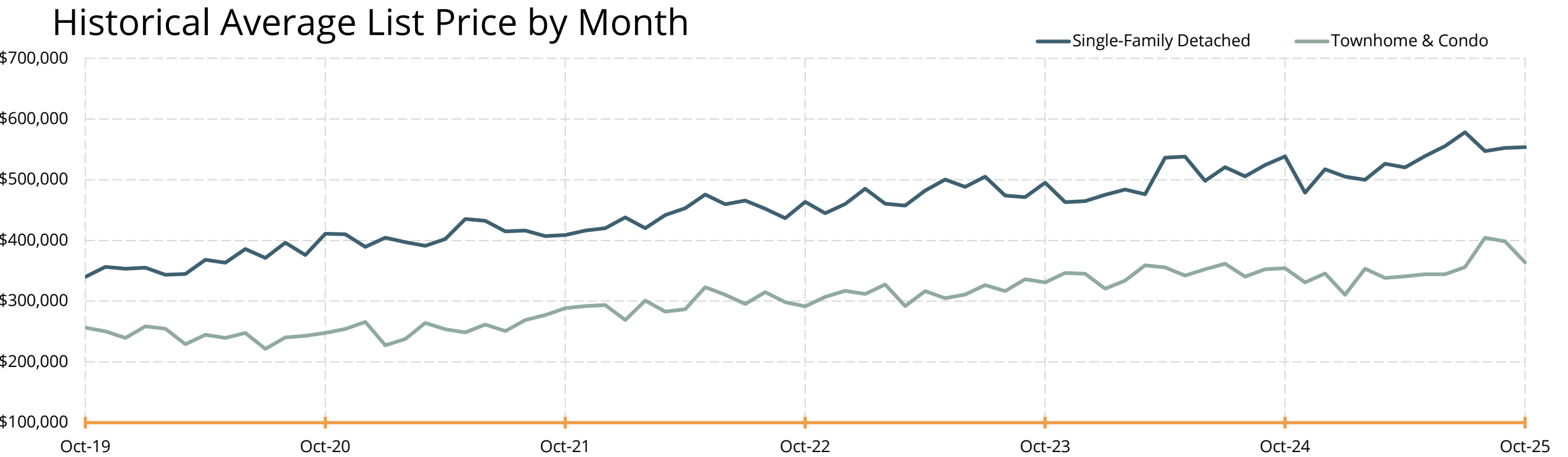
Historical New Listings by Month



Average List Price

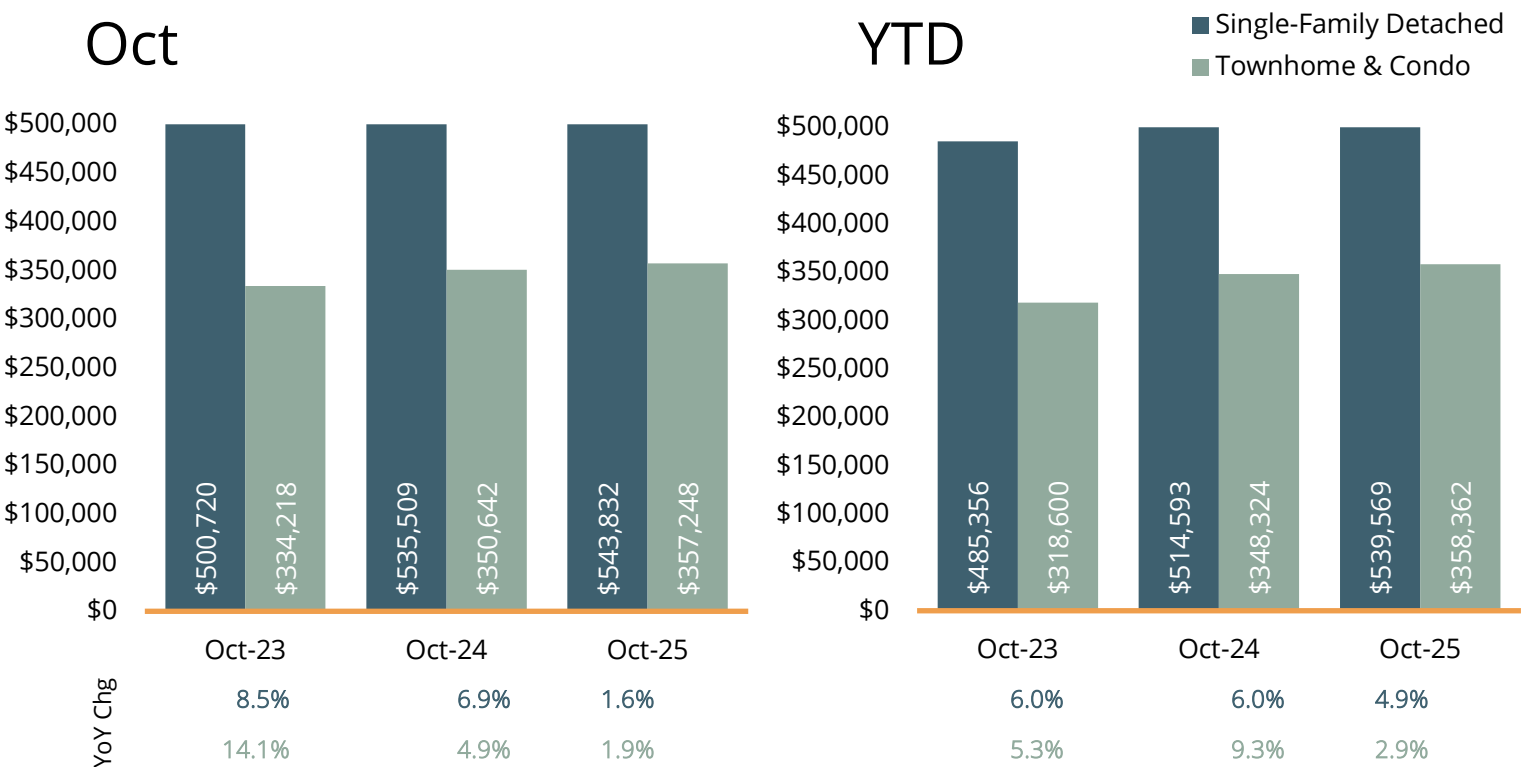


Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Nov-24	\$478,749	3.4%	\$330,960	-4.5%
Dec-24	\$517,213	11.3%	\$345,729	0.1%
Jan-25	\$505,325	6.3%	\$310,386	-3.2%
Feb-25	\$500,148	3.4%	\$353,290	5.8%
Mar-25	\$526,176	10.5%	\$338,260	-5.8%
Apr-25	\$520,424	-2.9%	\$340,790	-4.2%
May-25	\$538,745	0.1%	\$344,370	0.6%
Jun-25	\$555,413	11.5%	\$344,370	-2.4%
Jul-25	\$578,227	11.0%	\$356,279	-1.5%
Aug-25	\$547,379	8.3%	\$404,529	18.9%
Sep-25	\$552,173	5.4%	\$398,532	13.0%
Oct-25	\$553,502	2.8%	\$364,076	2.8%
12-month Avg	\$531,123	5.8%	\$352,631	1.6%

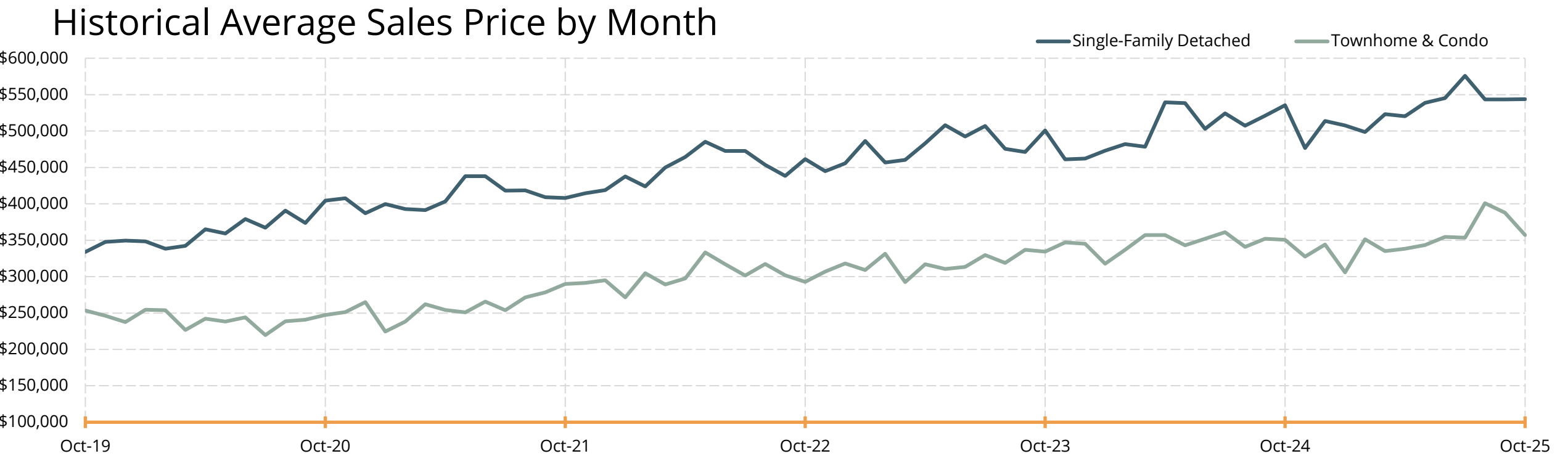


Source: Virginia REALTORS®, data accessed November 15, 2025

Average Sales Price

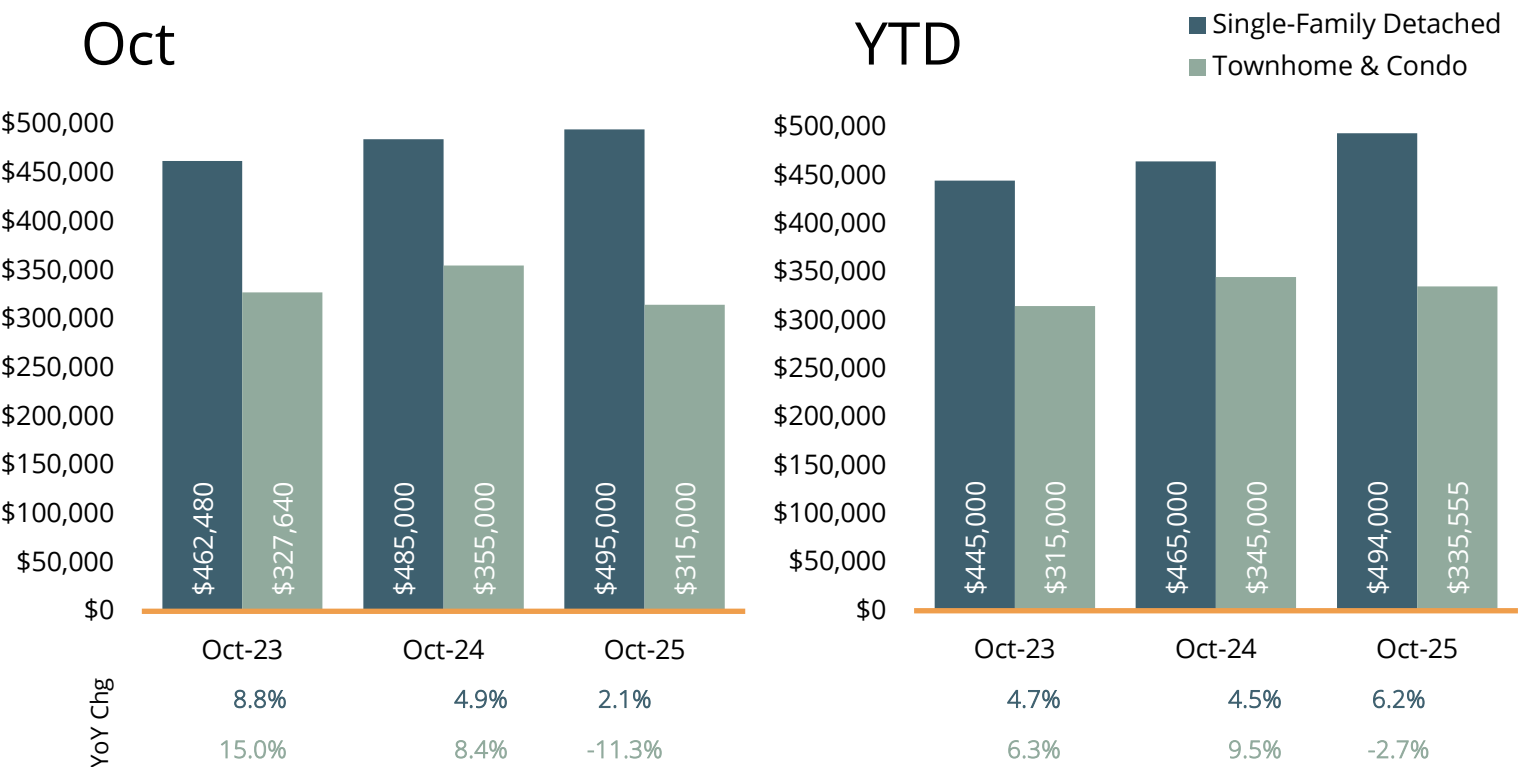


Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Nov-24	\$476,542	3.4%	\$327,502	-5.7%
Dec-24	\$513,758	11.2%	\$344,229	-0.3%
Jan-25	\$507,786	7.3%	\$305,920	-3.7%
Feb-25	\$498,522	3.4%	\$351,316	4.3%
Mar-25	\$523,236	9.4%	\$335,184	-6.2%
Apr-25	\$520,217	-3.5%	\$338,200	-5.3%
May-25	\$538,884	0.1%	\$343,527	0.2%
Jun-25	\$545,072	8.4%	\$354,415	0.7%
Jul-25	\$575,845	9.8%	\$353,416	-2.1%
Aug-25	\$543,408	7.1%	\$400,881	17.6%
Sep-25	\$543,400	4.3%	\$387,676	10.2%
Oct-25	\$543,832	1.6%	\$357,248	1.9%
12-month Avg	\$527,542	5.1%	\$349,960	0.9%



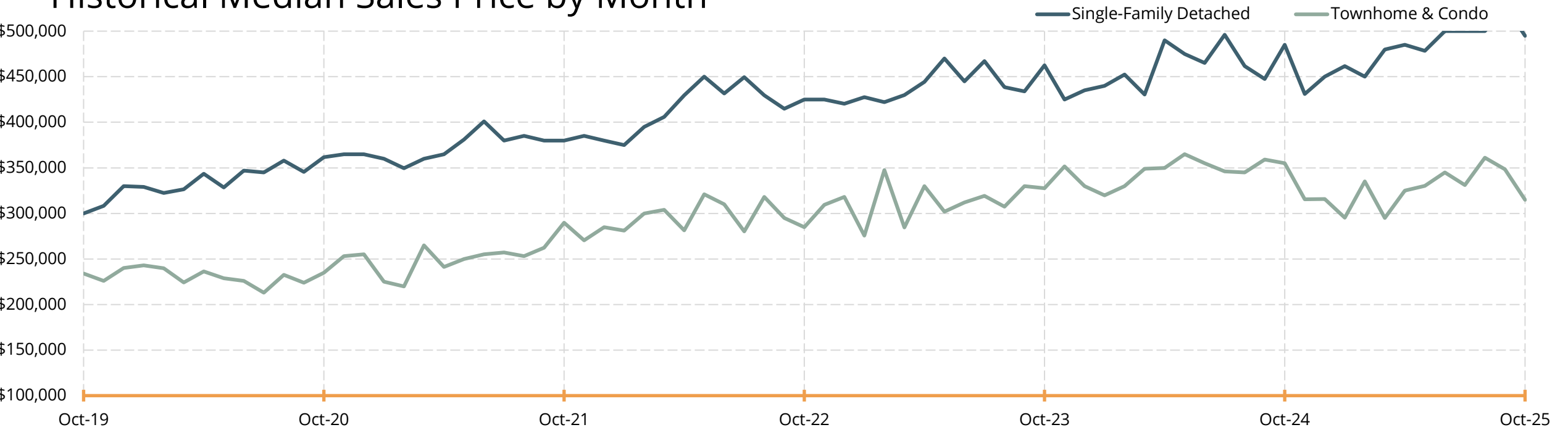
Source: Virginia REALTORS®, data accessed November 15, 2025

Median Sales Price



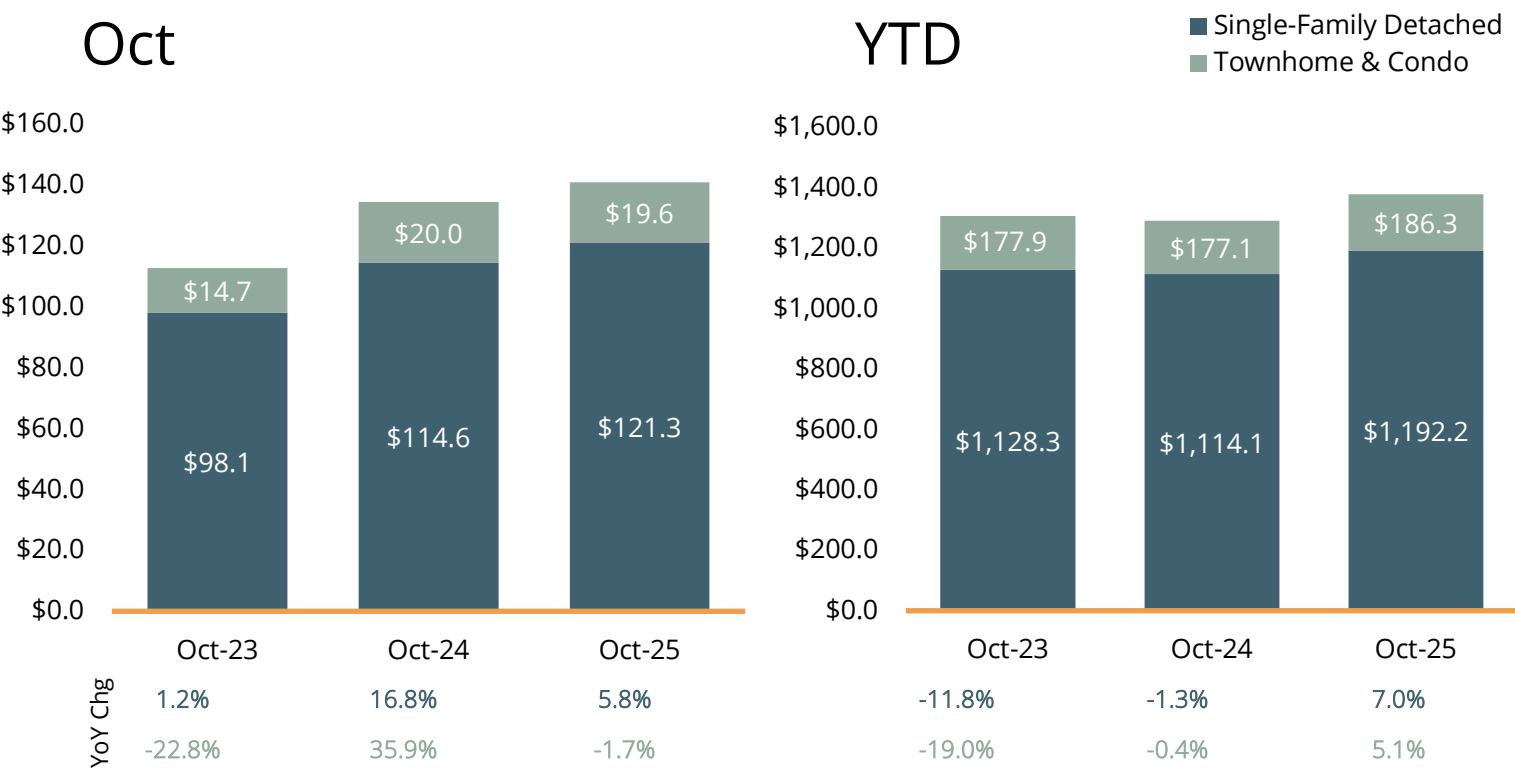
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Nov-24	\$431,000	1.4%	\$315,500	-10.2%
Dec-24	\$450,000	3.4%	\$315,894	-4.3%
Jan-25	\$461,723	4.9%	\$295,147	-7.8%
Feb-25	\$450,000	-0.6%	\$335,000	1.5%
Mar-25	\$480,000	11.5%	\$294,995	-15.5%
Apr-25	\$485,100	-1.0%	\$325,000	-7.1%
May-25	\$478,495	0.7%	\$330,250	-9.5%
Jun-25	\$499,999	7.5%	\$345,000	-2.8%
Jul-25	\$499,950	0.8%	\$331,000	-4.3%
Aug-25	\$500,000	8.3%	\$361,000	4.6%
Sep-25	\$528,000	18.0%	\$348,500	-2.9%
Oct-25	\$495,000	2.1%	\$315,000	-11.3%
12-month Avg	\$479,939	4.7%	\$326,024	-5.9%

Historical Median Sales Price by Month



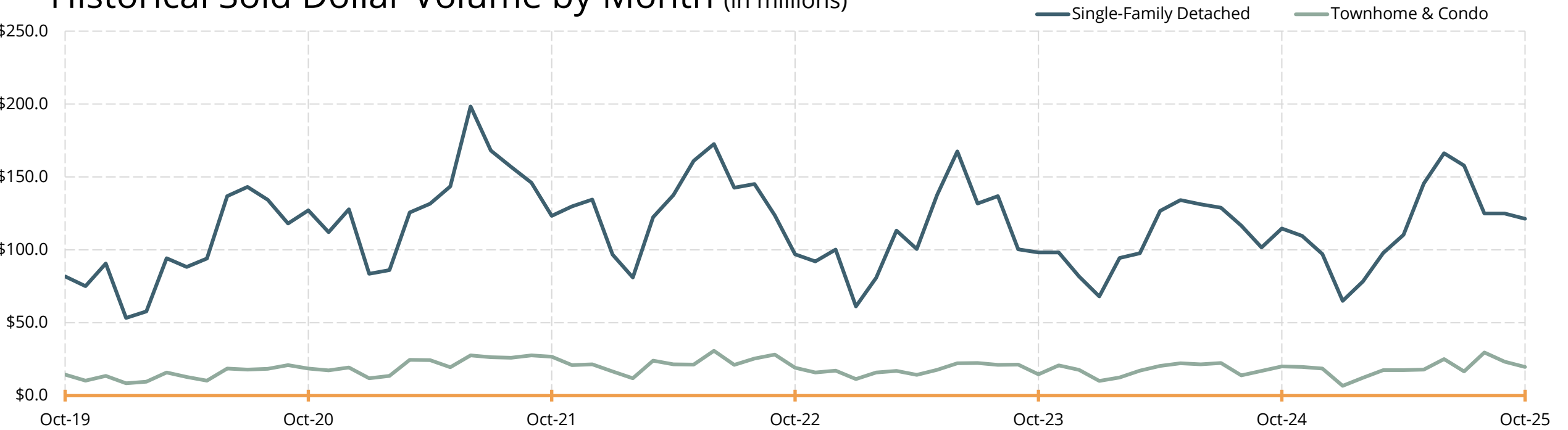
Source: Virginia REALTORS®, data accessed November 15, 2025

Sold Dollar Volume (in millions)



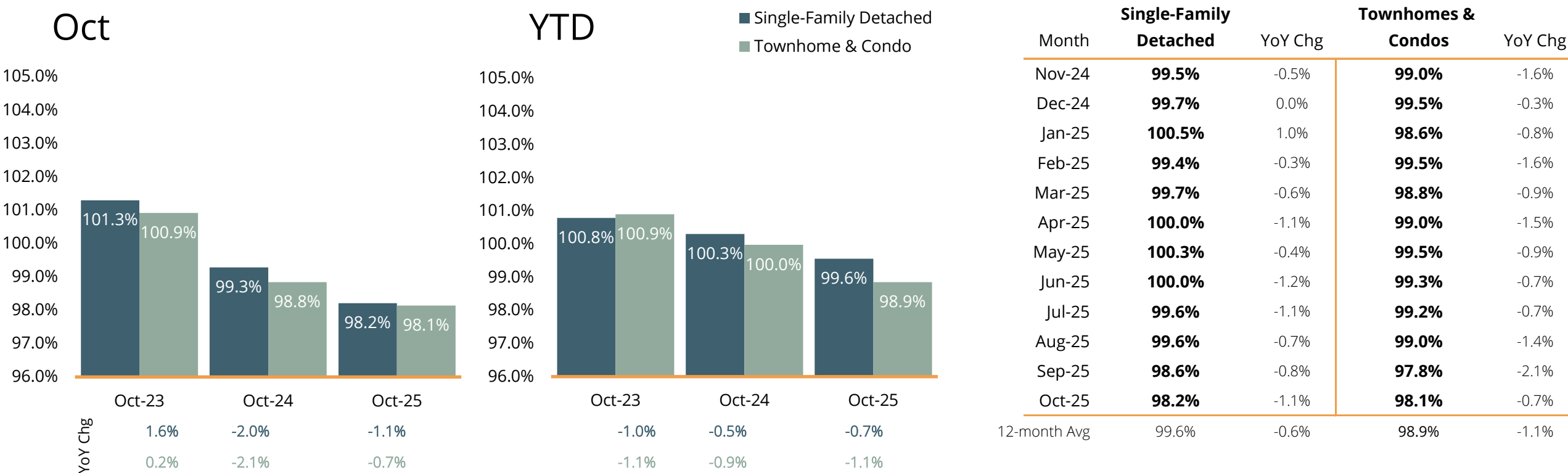
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Nov-24	\$109.6	11.6%	\$19.7	-5.7%
Dec-24	\$97.1	18.7%	\$18.6	5.6%
Jan-25	\$65.0	-4.6%	\$6.7	-33.8%
Feb-25	\$78.3	-17.2%	\$12.3	-1.3%
Mar-25	\$97.8	0.3%	\$17.4	1.6%
Apr-25	\$110.3	-13.0%	\$17.6	-13.6%
May-25	\$145.5	8.5%	\$17.9	-19.8%
Jun-25	\$166.2	26.7%	\$25.2	17.2%
Jul-25	\$157.8	22.4%	\$16.6	-25.8%
Aug-25	\$125.0	7.1%	\$29.7	112.3%
Sep-25	\$125.0	23.0%	\$23.3	37.7%
Oct-25	\$121.3	5.8%	\$19.6	-1.7%
12-month Avg	\$116.6	8.1%	\$18.7	4.1%

Historical Sold Dollar Volume by Month (in millions)

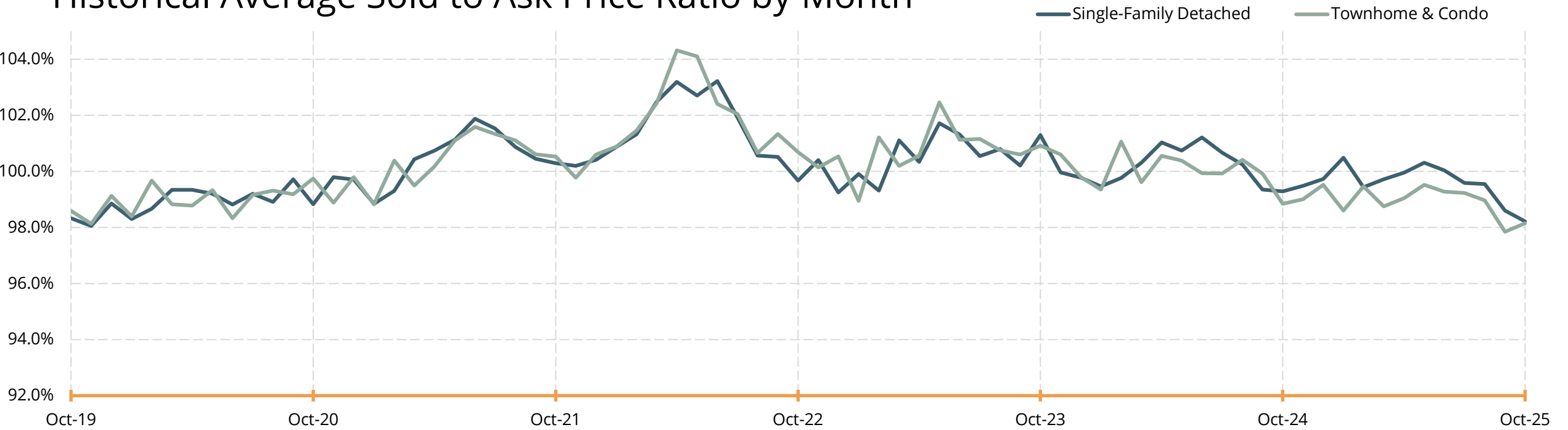


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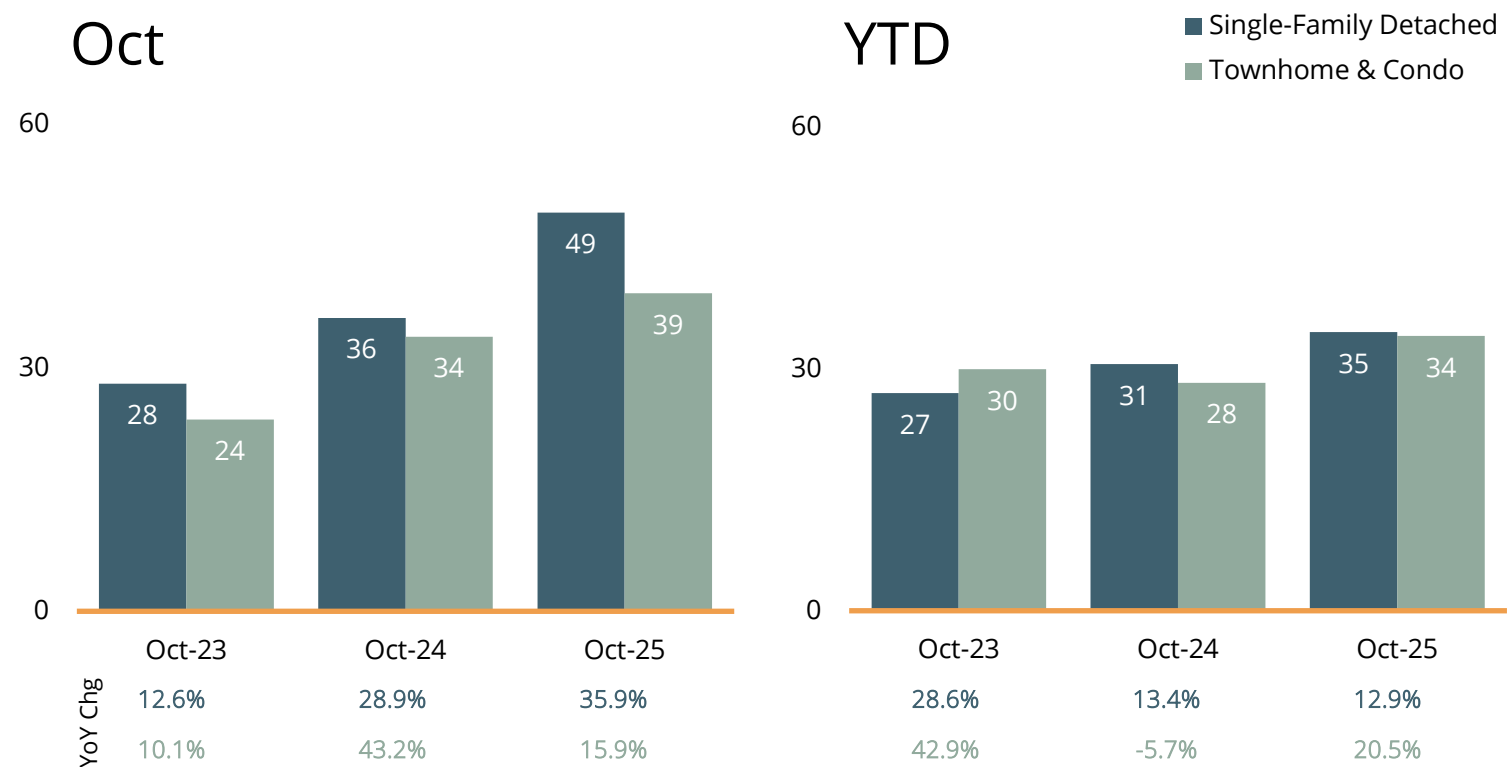
Average Sold to Ask Price Ratio



Historical Average Sold to Ask Price Ratio by Month

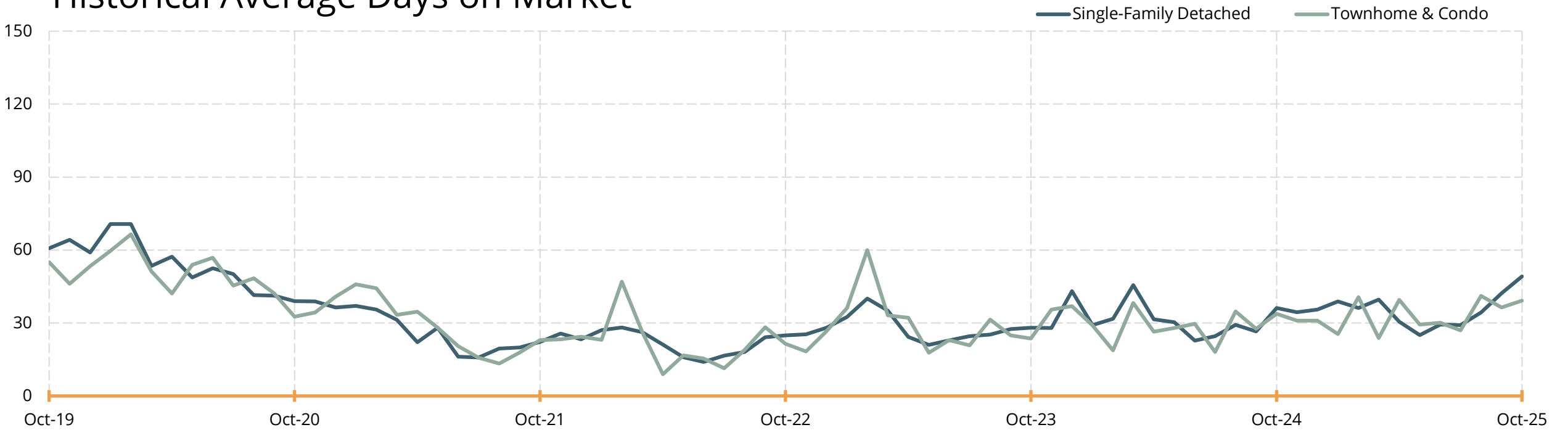


Average Days on Market



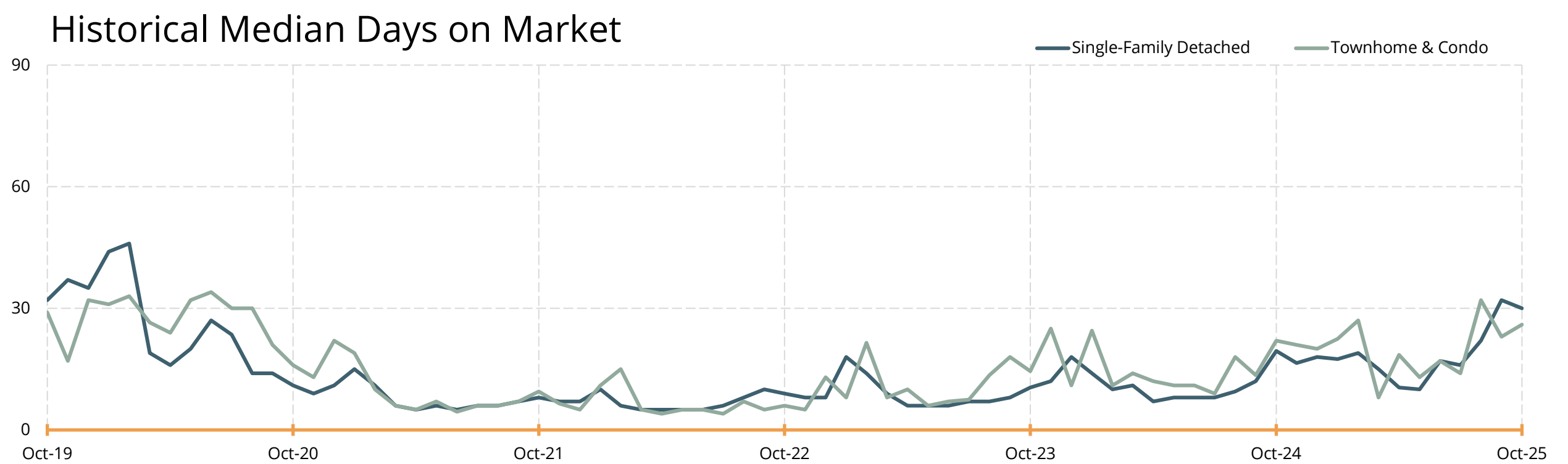
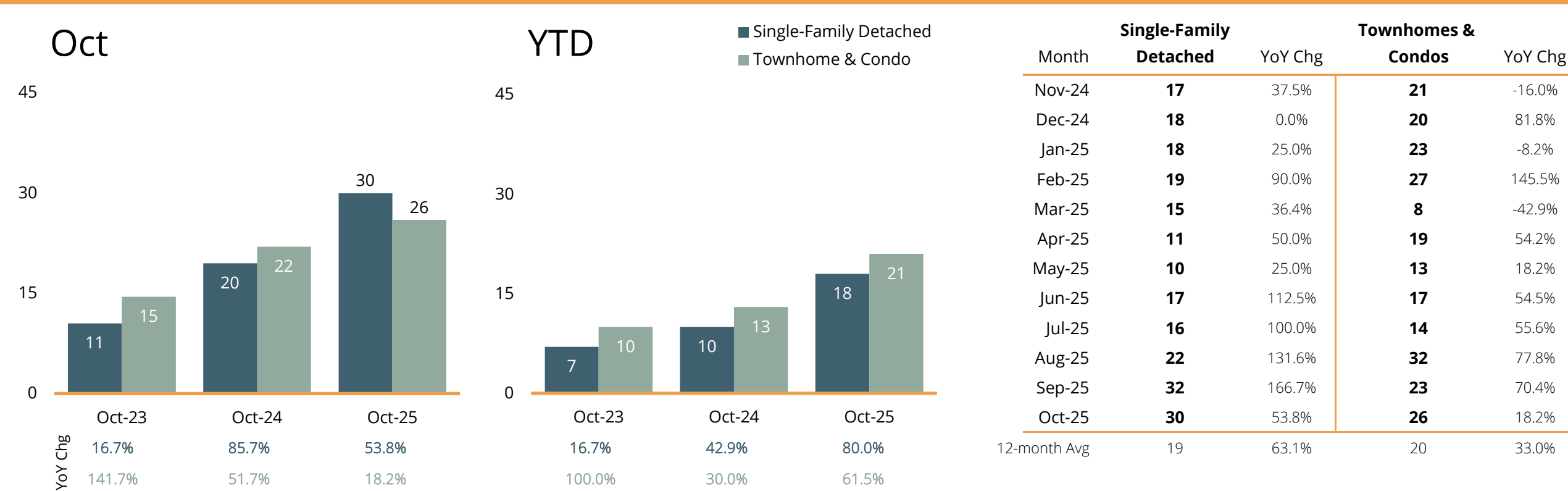
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Nov-24	34	23.2%	31	-12.6%
Dec-24	35	-17.6%	31	-16.2%
Jan-25	39	33.4%	26	-12.1%
Feb-25	36	14.0%	41	117.1%
Mar-25	40	-13.0%	24	-37.7%
Apr-25	30	-3.1%	40	49.5%
May-25	25	-17.5%	29	5.0%
Jun-25	29	29.1%	30	1.3%
Jul-25	29	18.7%	27	49.1%
Aug-25	34	17.1%	41	18.4%
Sep-25	42	59.4%	36	31.8%
Oct-25	49	35.9%	39	15.9%
12-month Avg	35	12.1%	33	10.6%

Historical Average Days on Market

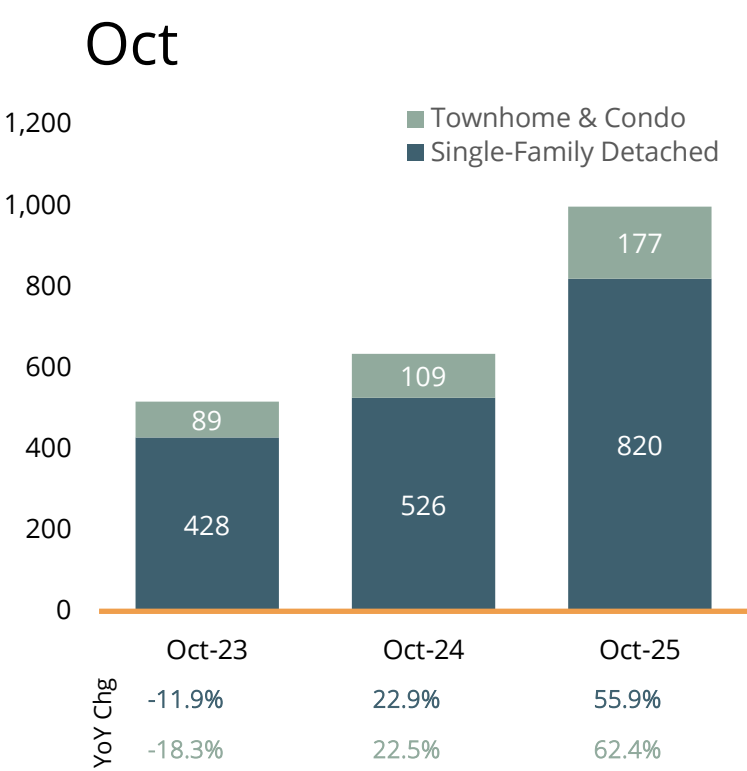


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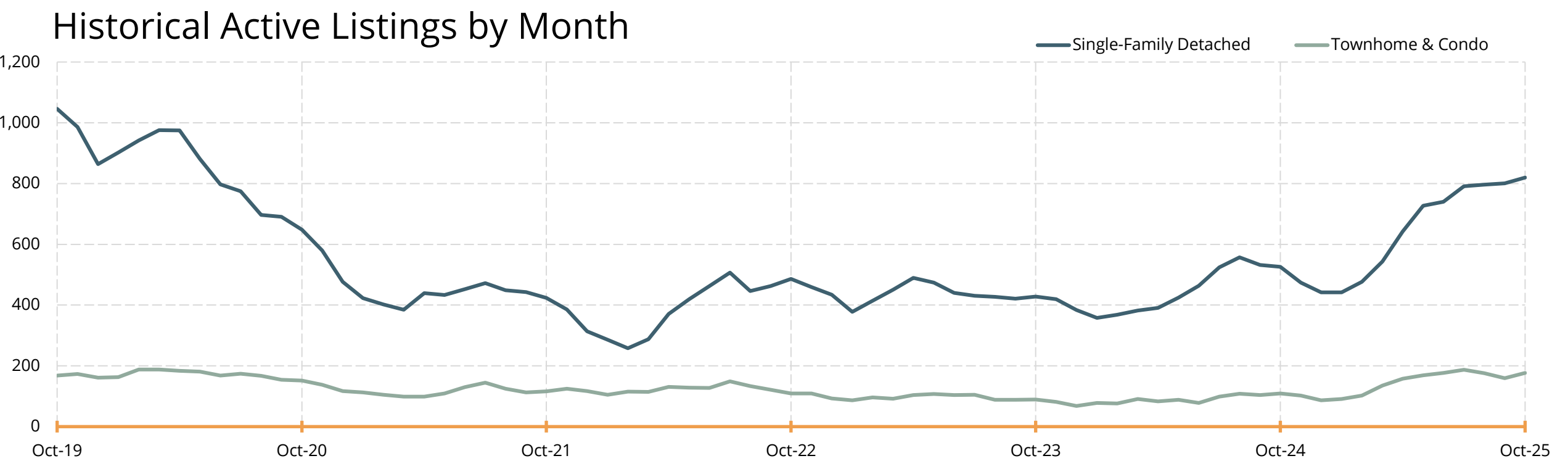
Median Days on Market



Active Listings



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
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%
Oct-25	820	55.9%	177	62.4%
12-month Avg	641	44.4%	143	61.8%

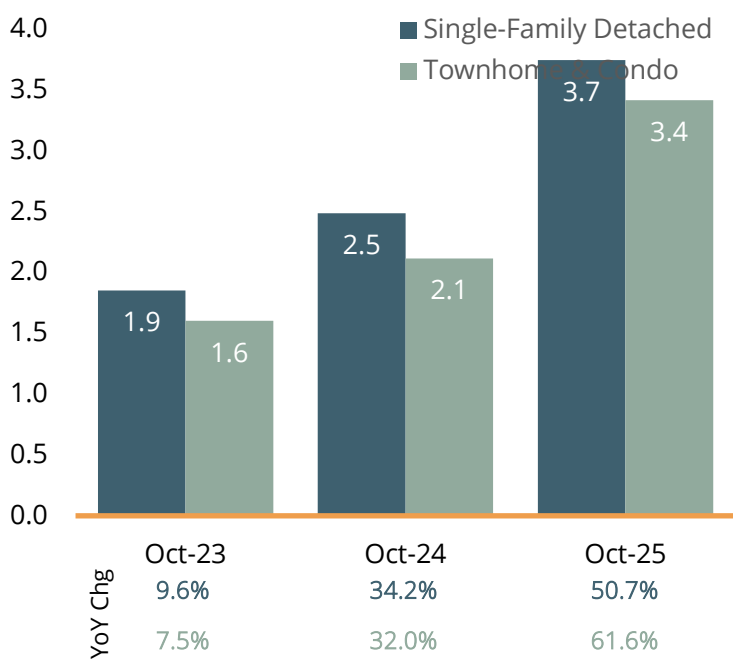


Source: Virginia REALTORS®, data accessed November 15, 2025

Months of Supply

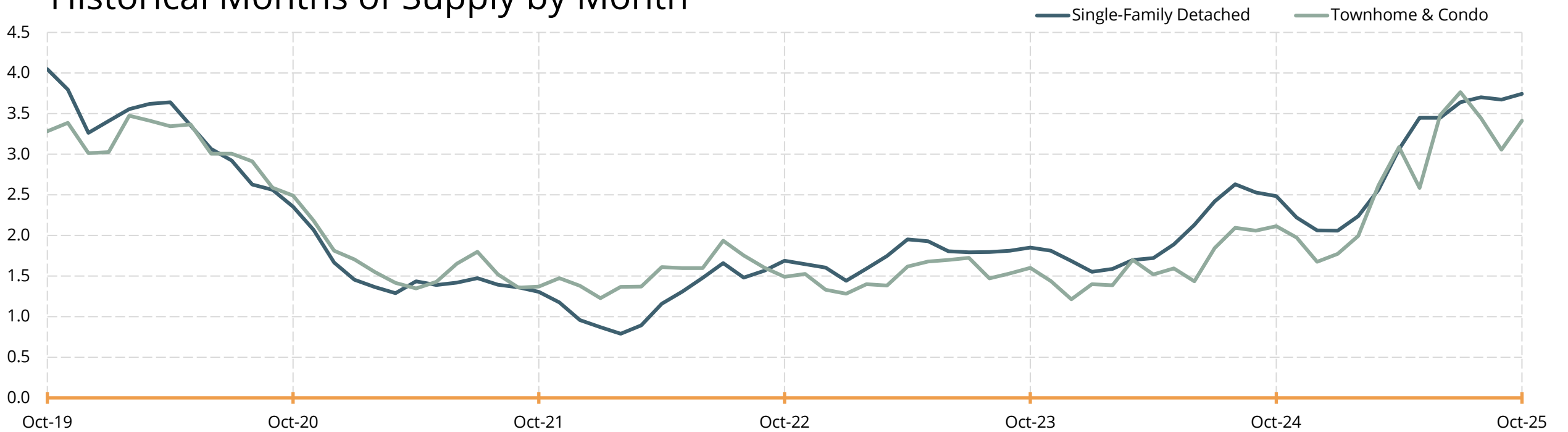


Oct



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	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



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

Area Overview - Total 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	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 TYD			Median Sales Price TYD			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



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	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



Geography	New Listings YTD			Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
	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



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Data and analysis provided by Virginia REALTORS® Research Team

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