

# WAAR WILLIAMSBURG

## MARKET INDICATORS REPORT

CUSTOM REPORT PREPARED BY  
**VIRGINIA REALTORS®**

# WAAR Market Indicators Report



## Key Market Trends: December 2025

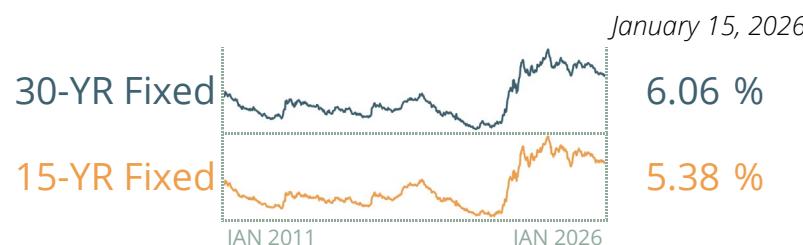
- After decreasing last month, sales jumped in the WAAR market to close out the year. In December, there were 270 home sales in the area, 27 more sales than the year before, increasing by 11.1%. The two markets with the biggest gains in activity were Williamsburg with 12 additional sales (+80%) and York County, which had 11 more sales than last year (+14.5%). Sales fell for the fourth consecutive month in Charles City County (-57.1%).
- Regionwide, pending sales continued to climb. The total number of pending sales came to 191 in December, up 23.2% which is 36 more pending sales than a year earlier. Pending sales rose sharply in Williamsburg with 13 more than last year (+216.7%) and in New Kent County with 12 additional pending sales (+38.7%). James City County was the only market where pending sales dipped this month (-5.6%).
- For the eighth straight month, prices have grown in the WAAR area. At \$503,750, the median sales price was 18.5% higher in December of this year compared to last year, representing a \$78,760 price gain. Home prices rose by double digits in James City County with the median price \$91,500 higher than a year earlier (+20.9%) and in New Kent County with the median sales price up \$80,000 (+20%).
- Supply levels continue to improve across most of the WAAR footprint. At the end of December, there were 783 active listings on the market, up 48% or 254 more listings than the previous year. Listing activity went up the most in James City County with 127 more listings than last December (+58.3%) and York County with an additional 54 (+39.1%). Charles City County had one fewer listing than a year ago (-14.3%).



WAAR Market Dashboard

YoY Chg	Dec-25	Indicator
▲ 11.1%	270	Sales
▲ 23.2%	191	Pending Sales
▲ 3.6%	202	New Listings
▲ 10.8%	\$530,816	Average List Price
▲ 10.3%	\$525,182	Average Sales Price
▲ 18.5%	\$503,750	Median Sales Price
▲ 4.2%	\$223	Average Price Per Square Foot
▲ 22.6%	\$141.8	Sold Dollar Volume (in millions)
▼ -0.6%	99.1%	Average Sold/Ask Price Ratio
▲ 41.1%	49	Average Days on Market
▲ 65.8%	32	Median Days on Market
▲ 48.0%	783	Active Listings
▲ 46.7%	2.9	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.**

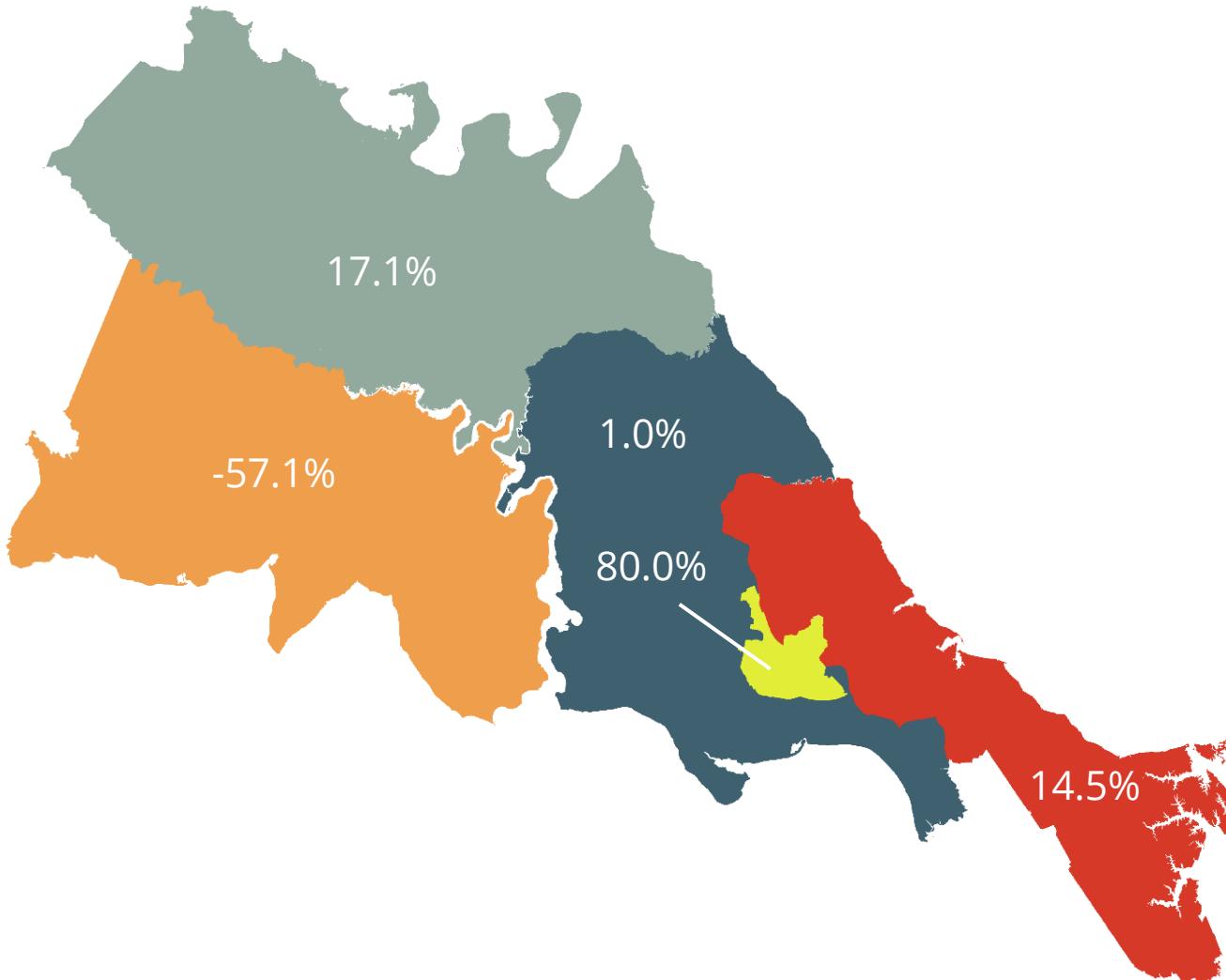
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

**Are You Ready to Buy or Sell Real Estate?**

Contact an experienced REALTOR®.



# Market Activity - WAAR Footprint



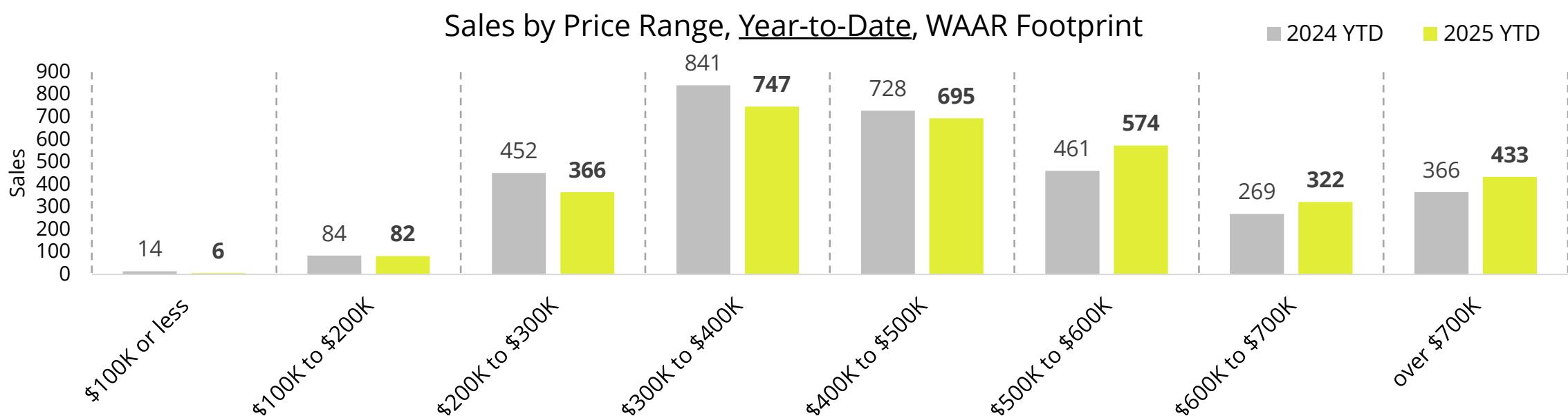
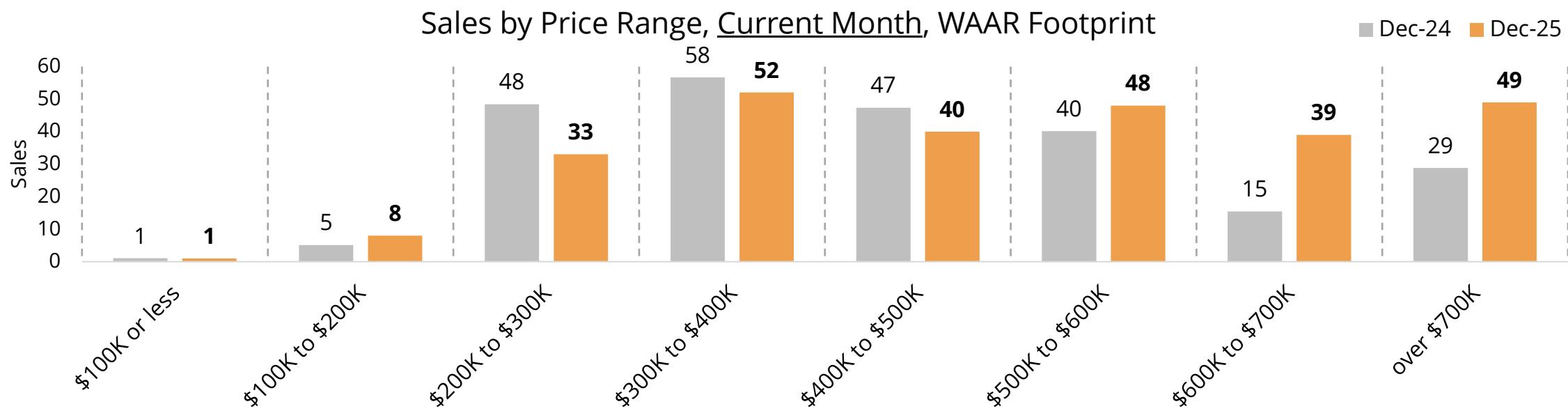
Jurisdiction	Total Sales		
	Dec-24	Dec-25	% Chg
Charles City County	7	3	-57.1%
James City County	104	105	1.0%
New Kent County	41	48	17.1%
Williamsburg	15	27	80.0%
York County	76	87	14.5%
<b>WAAR</b>	<b>243</b>	<b>270</b>	<b>11.1%</b>

# Total Market Overview



Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23	2023	2024						
Sales		243	<b>270</b>	11.1%	3,215	<b>3,225</b>	0.3%		
Pending Sales		155	<b>191</b>	23.2%	2,802	<b>2,911</b>	3.9%		
New Listings		195	<b>202</b>	3.6%	3,741	<b>4,507</b>	20.5%		
Average List Price		\$479,106	<b>\$530,816</b>	10.8%	\$479,858	<b>\$511,912</b>	6.7%		
Average Sales Price		\$476,085	<b>\$525,182</b>	10.3%	\$479,981	<b>\$507,403</b>	5.7%		
Median Sales Price		\$424,990	<b>\$503,750</b>	18.5%	\$426,000	<b>\$462,500</b>	8.6%		
Average Price Per Square Foot		\$214	<b>\$223</b>	4.2%	\$212	<b>\$220</b>	3.9%		
Sold Dollar Volume (in millions)		\$115.7	<b>\$141.8</b>	22.6%	\$1,517.6	<b>\$1,611.5</b>	6.2%		
Average Sold/Ask Price Ratio		99.7%	<b>99.1%</b>	-0.6%	100.1%	<b>99.4%</b>	-0.7%		
Average Days on Market		34	<b>49</b>	41.1%	31	<b>36</b>	17.7%		
Median Days on Market		19	<b>32</b>	65.8%	12	<b>19</b>	58.3%		
Active Listings		529	<b>783</b>	48.0%	n/a	<b>n/a</b>	n/a		
Months of Supply		2.0	<b>2.9</b>	46.7%	n/a	<b>n/a</b>	n/a		

# Total Market by Price Range

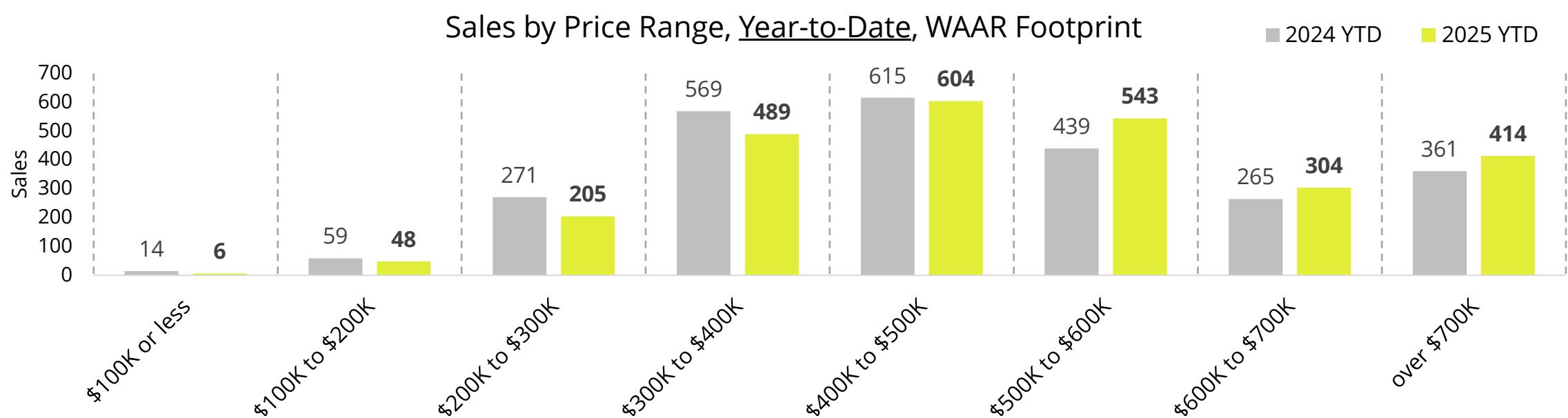
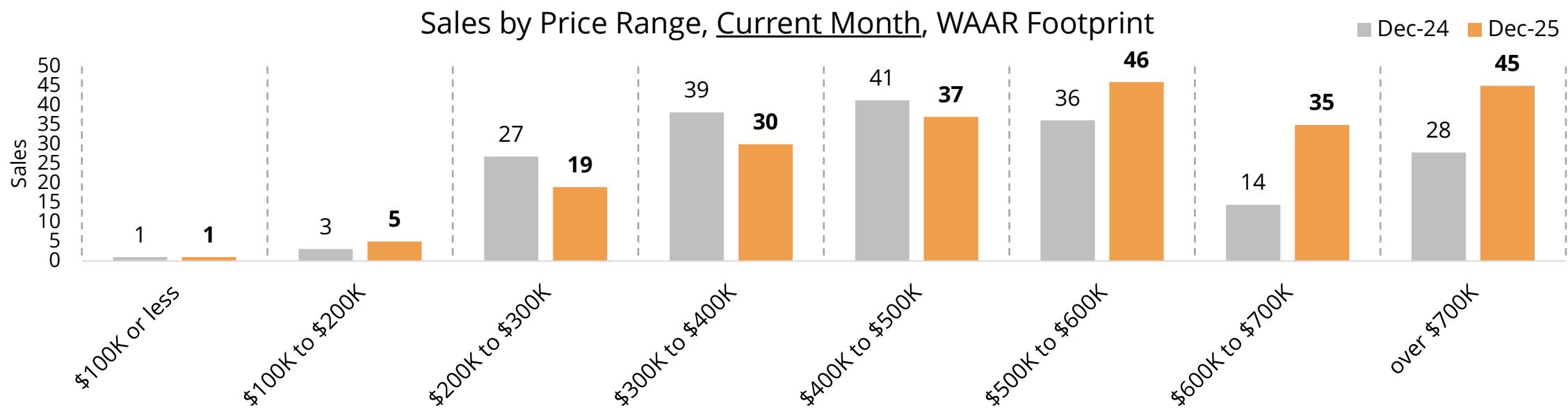


# Single-Family Detached Market Overview



Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23	Jan-23	Feb-23						
Sales				189	<b>218</b>	15.3%	2,593	<b>2,613</b>	0.8%
Pending Sales				133	<b>153</b>	15.0%	2,370	<b>2,438</b>	2.9%
New Listings				166	<b>171</b>	3.0%	3,107	<b>3,717</b>	19.6%
Average List Price				\$517,213	<b>\$564,305</b>	9.1%	\$511,777	<b>\$545,176</b>	6.5%
Average Sales Price				\$513,758	<b>\$558,311</b>	8.7%	\$512,130	<b>\$540,570</b>	5.6%
Median Sales Price				\$450,000	<b>\$525,000</b>	16.7%	\$465,000	<b>\$497,000</b>	6.9%
Average Price Per Square Foot				\$218	<b>\$224</b>	2.5%	\$214	<b>\$221</b>	3.5%
Sold Dollar Volume (in millions)				\$97.1	<b>\$121.7</b>	25.3%	\$1,320.8	<b>\$1,409.4</b>	6.7%
Average Sold/Ask Price Ratio				99.7%	<b>99.2%</b>	-0.6%	100.2%	<b>99.5%</b>	-0.7%
Average Days on Market				35	<b>47</b>	32.1%	31	<b>36</b>	16.2%
Median Days on Market				18	<b>28</b>	55.6%	11	<b>19</b>	72.7%
Active Listings				442	<b>646</b>	46.2%	n/a	<b>n/a</b>	n/a
Months of Supply				2.1	<b>3.0</b>	43.5%	n/a	<b>n/a</b>	n/a

# Single-Family Detached Market by Price Range



# Townhome & Condo Market Overview

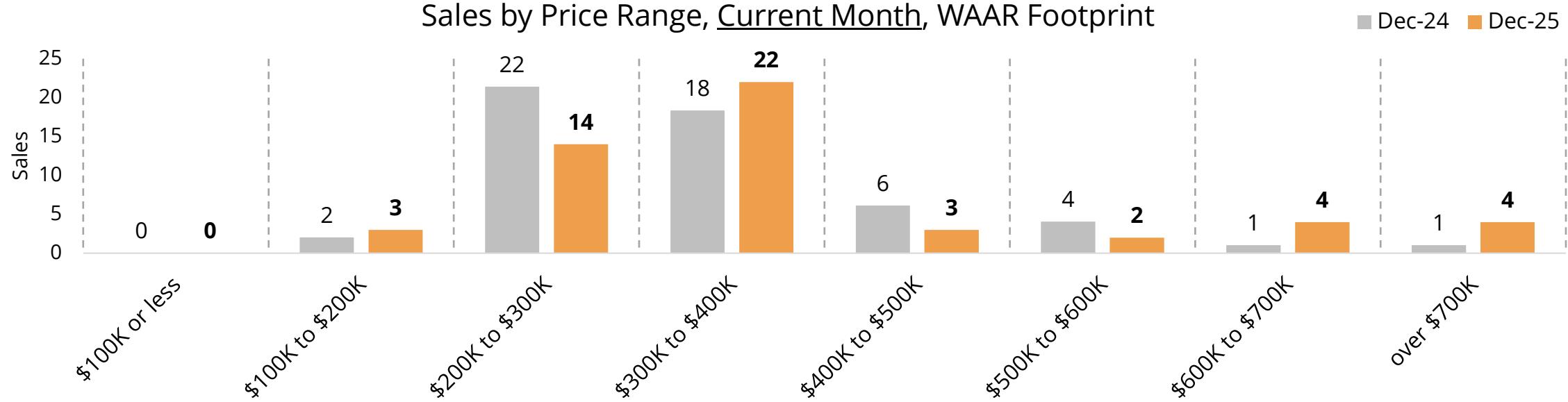


Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23	Dec-24	Dec-25						
Sales		54	<b>52</b>	-3.7%	622	<b>612</b>	-1.6%		
Pending Sales		22	<b>38</b>	72.7%	432	<b>473</b>	9.5%		
New Listings		29	<b>31</b>	6.9%	634	<b>790</b>	24.6%		
Average List Price		\$345,729	<b>\$390,420</b>	12.9%	\$347,109	<b>\$367,435</b>	5.9%		
Average Sales Price		\$344,229	<b>\$386,296</b>	12.2%	\$346,271	<b>\$363,349</b>	4.9%		
Median Sales Price		\$315,894	<b>\$339,500</b>	7.5%	\$342,520	<b>\$339,500</b>	-0.9%		
Average Price Per Square Foot		\$159	<b>\$219</b>	37.4%	\$197	<b>\$209</b>	6.3%		
Sold Dollar Volume (in millions)		\$18.6	<b>\$20.1</b>	8.1%	\$196.8	<b>\$202.1</b>	2.7%		
Average Sold/Ask Price Ratio		99.5%	<b>98.6%</b>	-0.9%	99.9%	<b>98.9%</b>	-1.0%		
Average Days on Market		31	<b>56</b>	81.1%	29	<b>36</b>	24.3%		
Median Days on Market		20	<b>43</b>	115.0%	15	<b>23</b>	53.3%		
Active Listings		87	<b>137</b>	57.5%	n/a	<b>n/a</b>	n/a		
Months of Supply		1.7	<b>2.7</b>	62.7%	n/a	<b>n/a</b>	n/a		

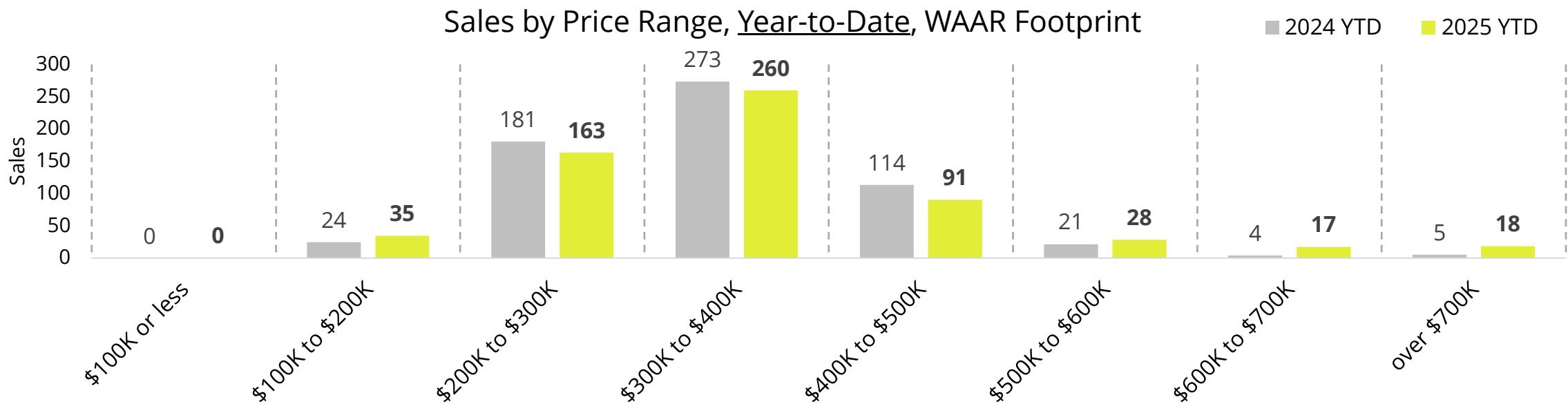
# Townhome & Condo Market by Price Range



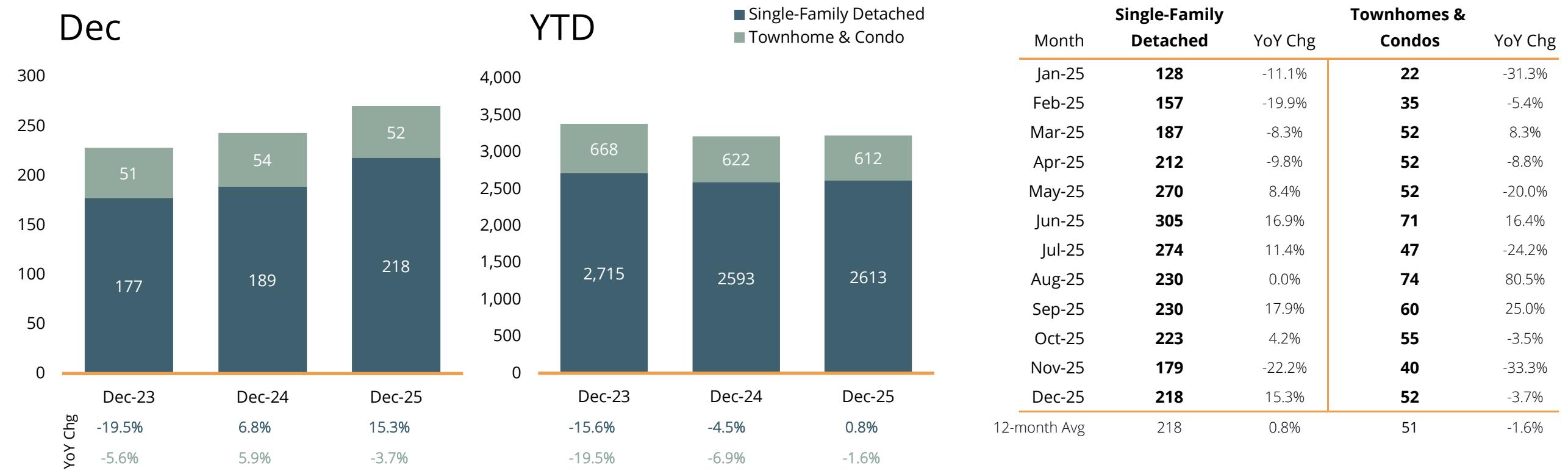
Sales by Price Range, Current Month, WAAR Footprint



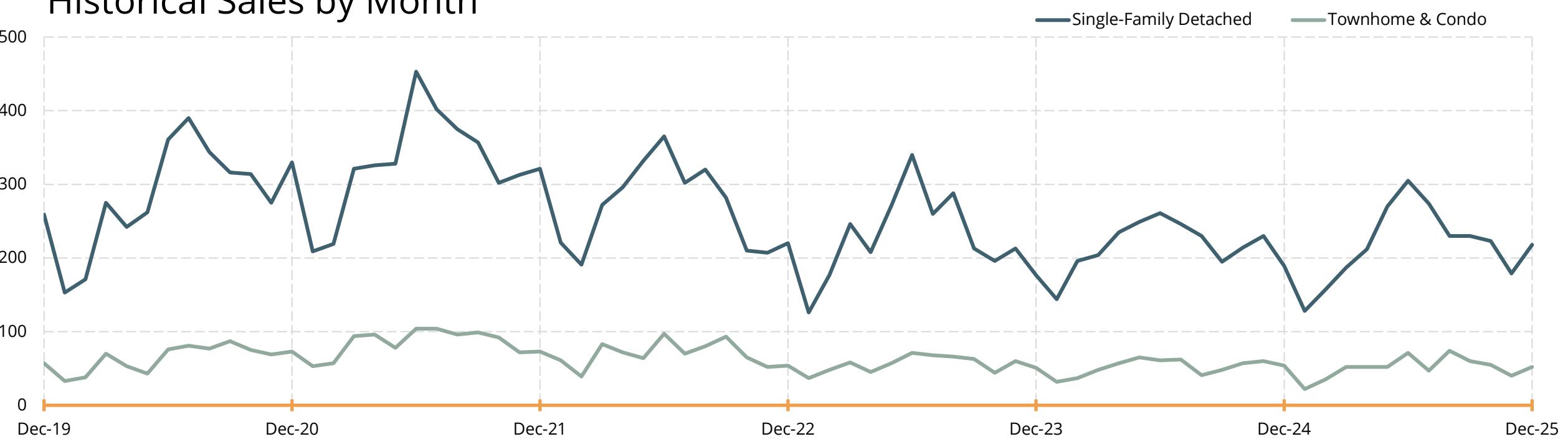
Sales by Price Range, Year-to-Date, WAAR Footprint



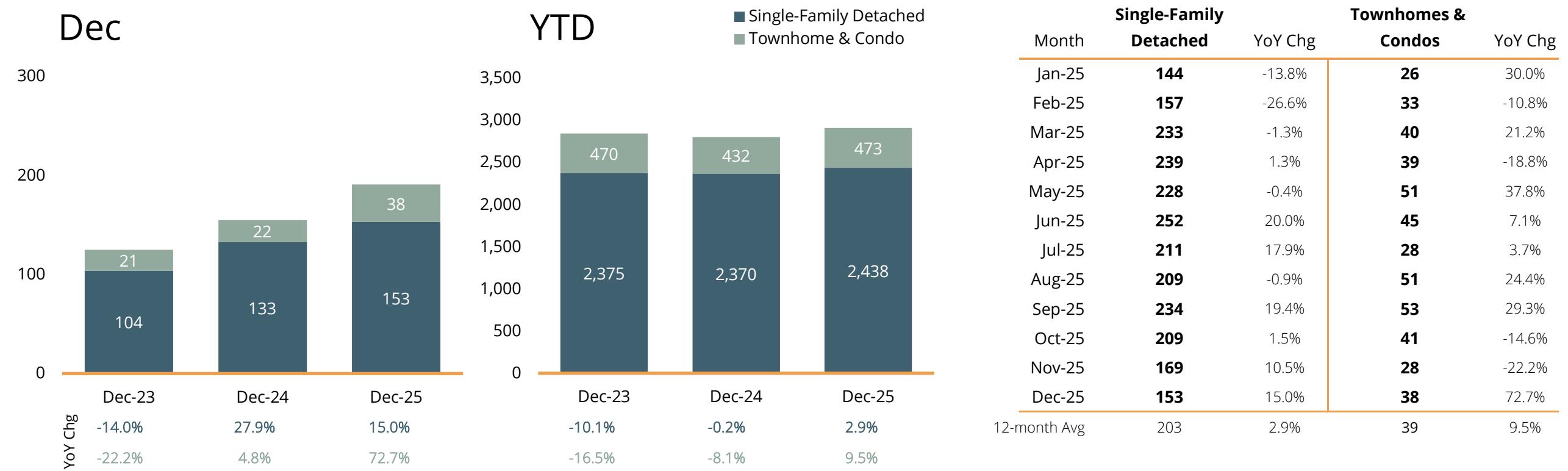
# Sales



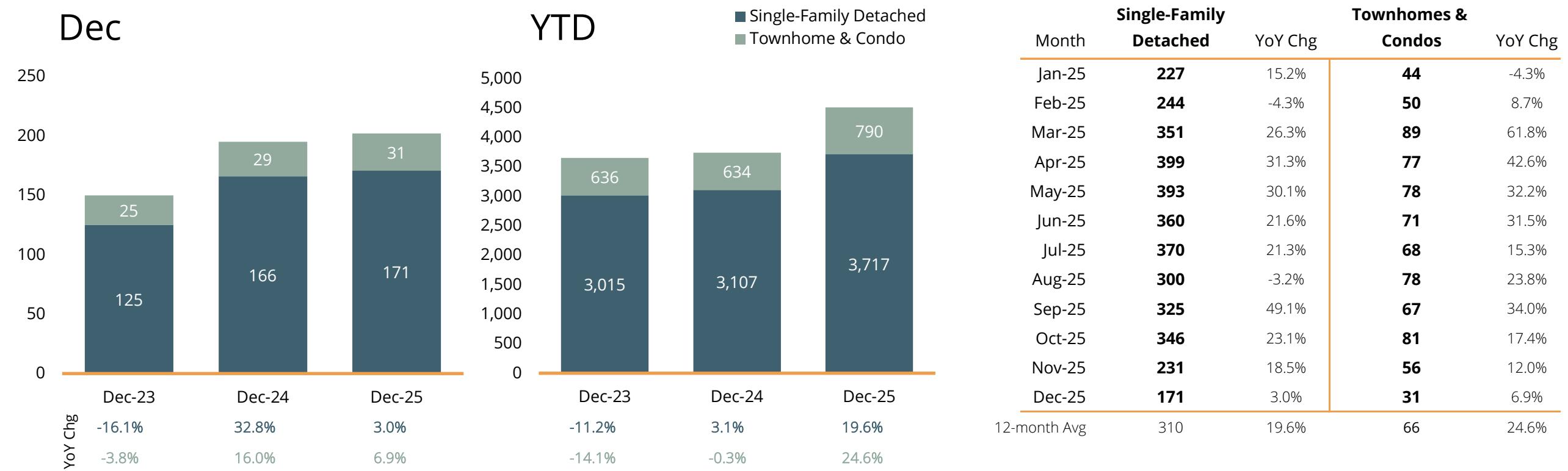
## Historical Sales by Month



# Pending Sales



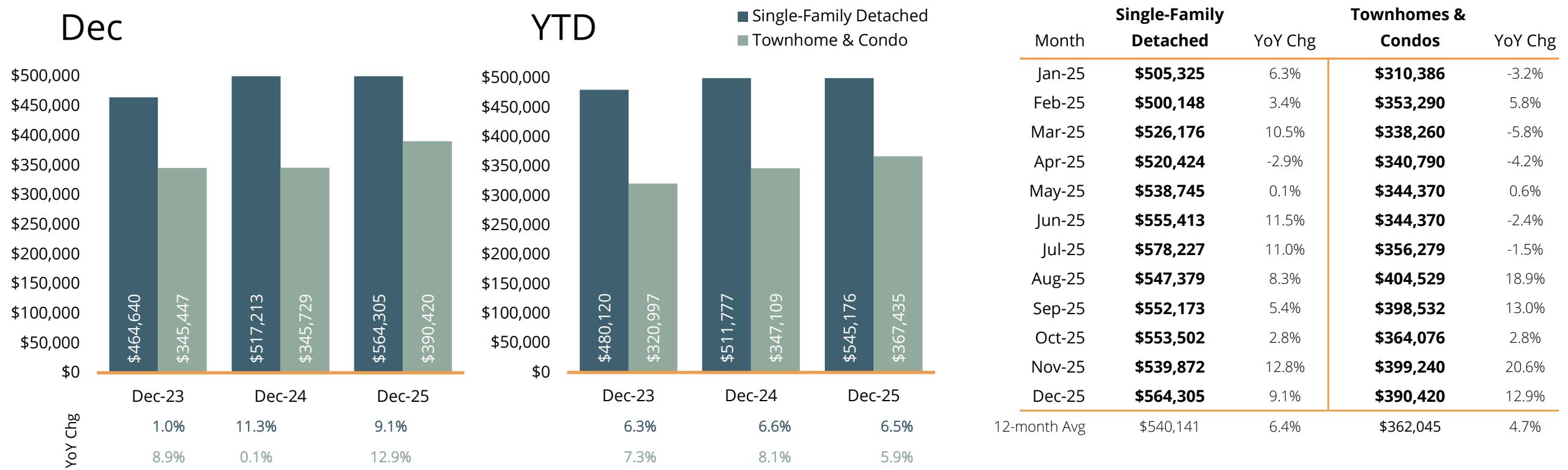
# New Listings



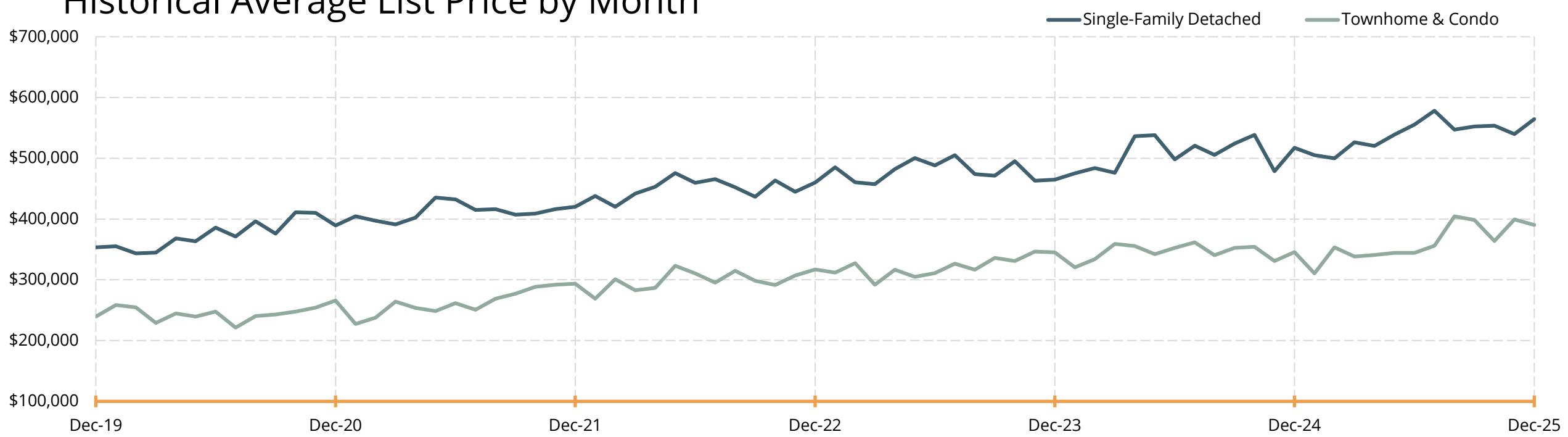
## Historical New Listings by Month



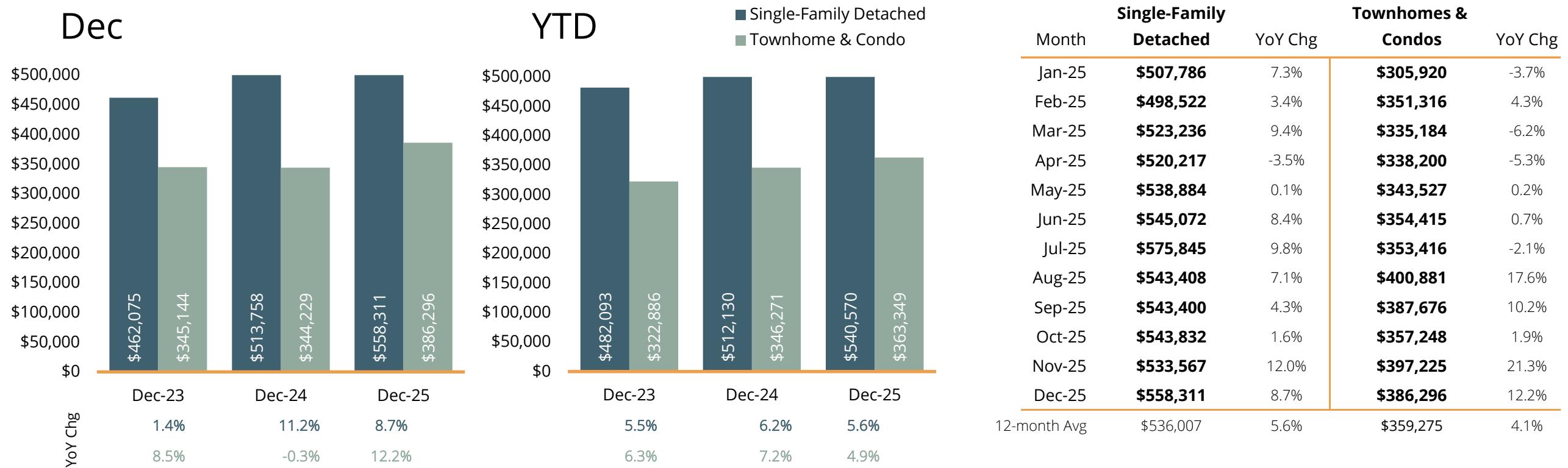
# Average List Price



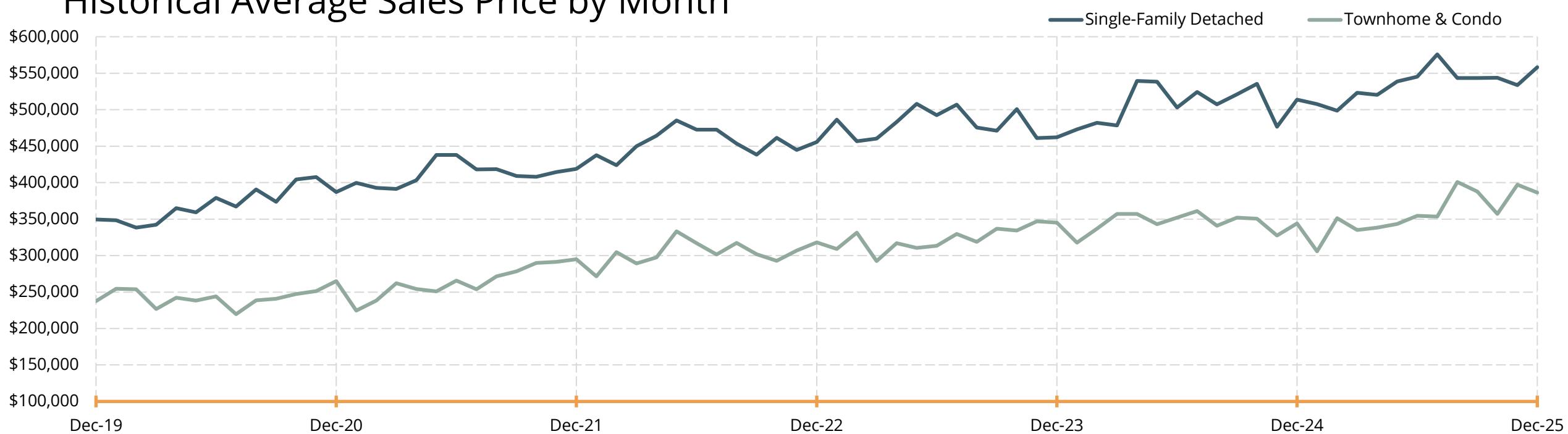
## Historical Average List Price by Month



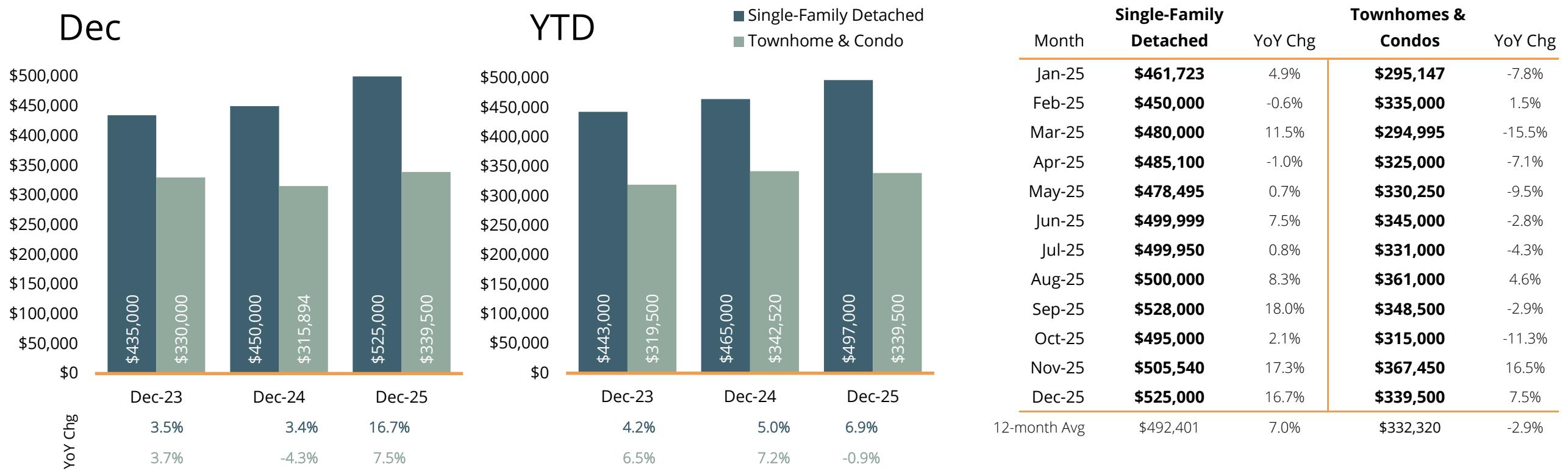
# Average Sales Price



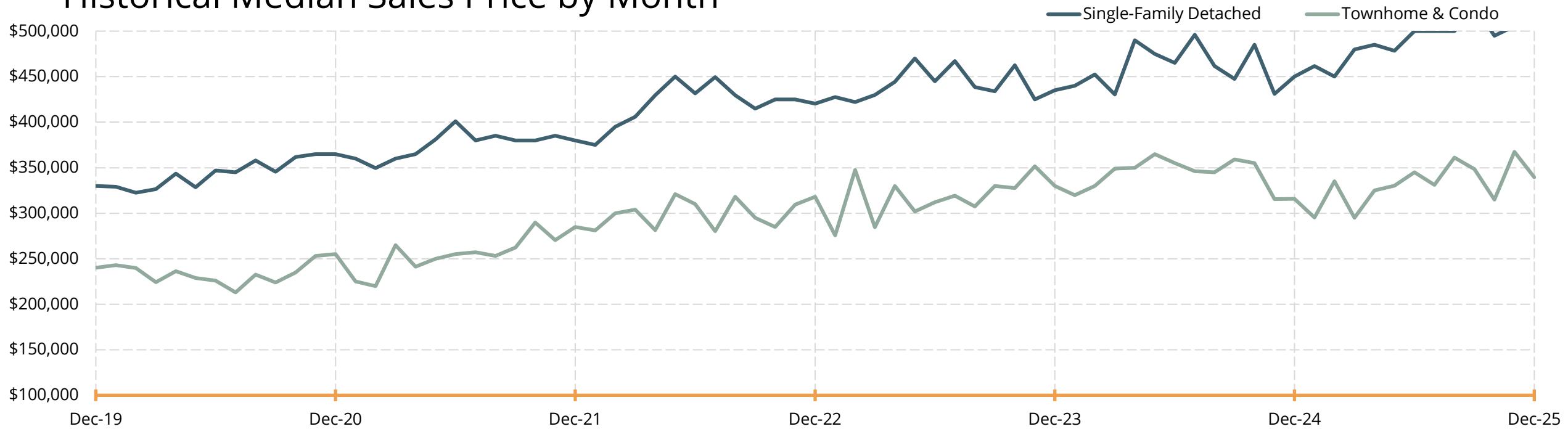
## Historical Average Sales Price by Month



# Median Sales Price



## Historical Median Sales Price by Month

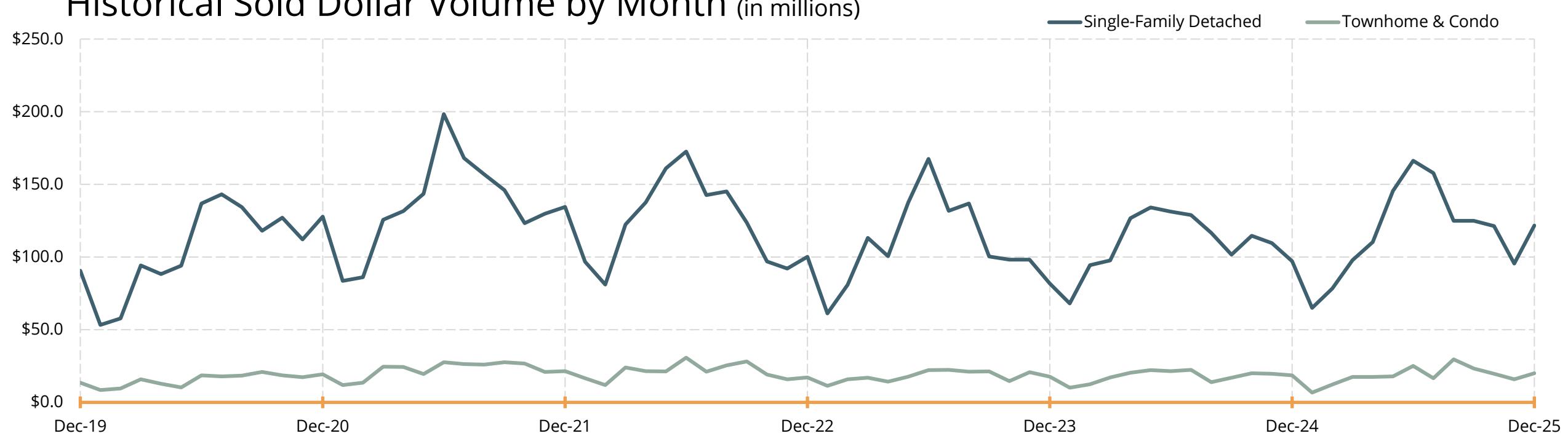


# Sold Dollar Volume (in millions)

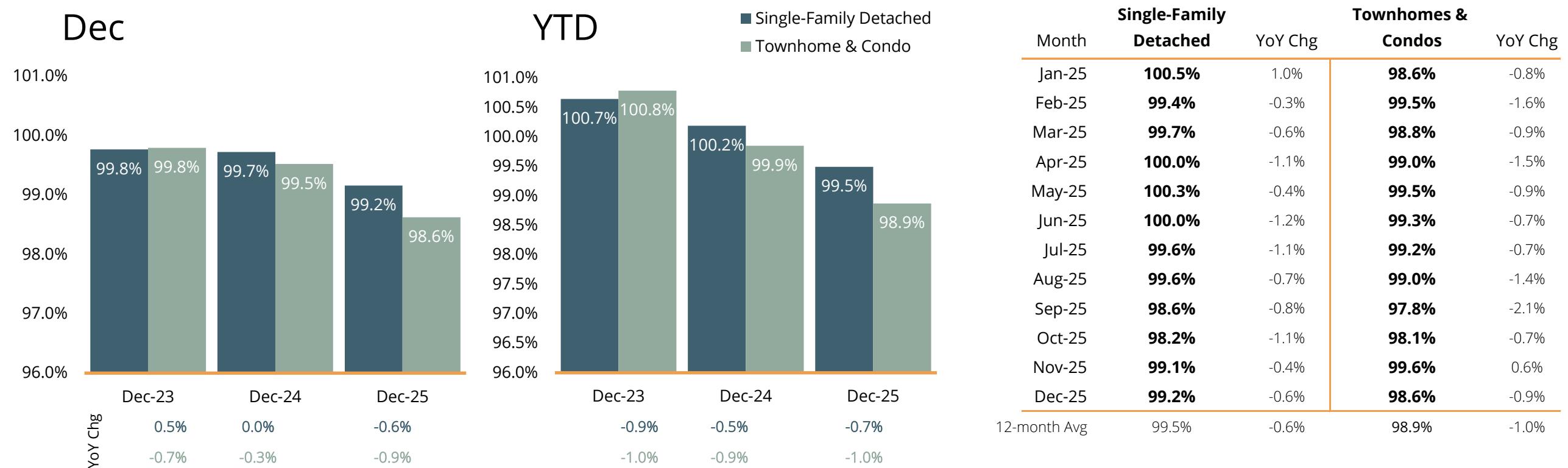


Dec	YTD			Single-Family Detached		Single-Family Detached		Townhomes & Condos	
	Single-Family Detached	Townhome & Condo	Month	YoY Chg	Single-Family Detached	YoY Chg	Month	YoY Chg	
\$160.0	\$1,800.0		Jan-25	\$65.0	-4.6%	\$6.7	-33.8%		
\$140.0	\$1,600.0		Feb-25	\$78.3	-17.2%	\$12.3	-1.3%		
\$120.0	\$1,400.0		Mar-25	\$97.8	0.3%	\$17.4	1.6%		
\$100.0	\$1,200.0		Apr-25	\$110.3	-13.0%	\$17.6	-13.6%		
\$80.0	\$1,000.0		May-25	\$145.5	8.5%	\$17.9	-19.8%		
\$60.0	\$800.0		Jun-25	\$166.2	26.7%	\$25.2	17.2%		
\$40.0	\$600.0		Jul-25	\$157.8	22.4%	\$16.6	-25.8%		
\$20.0	\$400.0		Aug-25	\$125.0	7.1%	\$29.7	112.3%		
\$0.0	\$200.0		Sep-25	\$125.0	23.0%	\$23.3	37.7%		
	\$0.0		Oct-25	\$121.3	5.8%	\$19.6	-1.7%		
			Nov-25	\$95.5	-12.9%	\$15.9	-19.1%		
			Dec-25	\$121.7	25.3%	\$20.1	8.1%		
Dec-23	Dec-24	Dec-25	Dec-23	Dec-24	Dec-25	12-month Avg	\$117.4	6.7%	
-18.4%	18.7%	25.3%	-11.1%	1.0%	6.7%				
2.5%	5.6%	8.1%	-14.4%	-9.0%	2.7%				

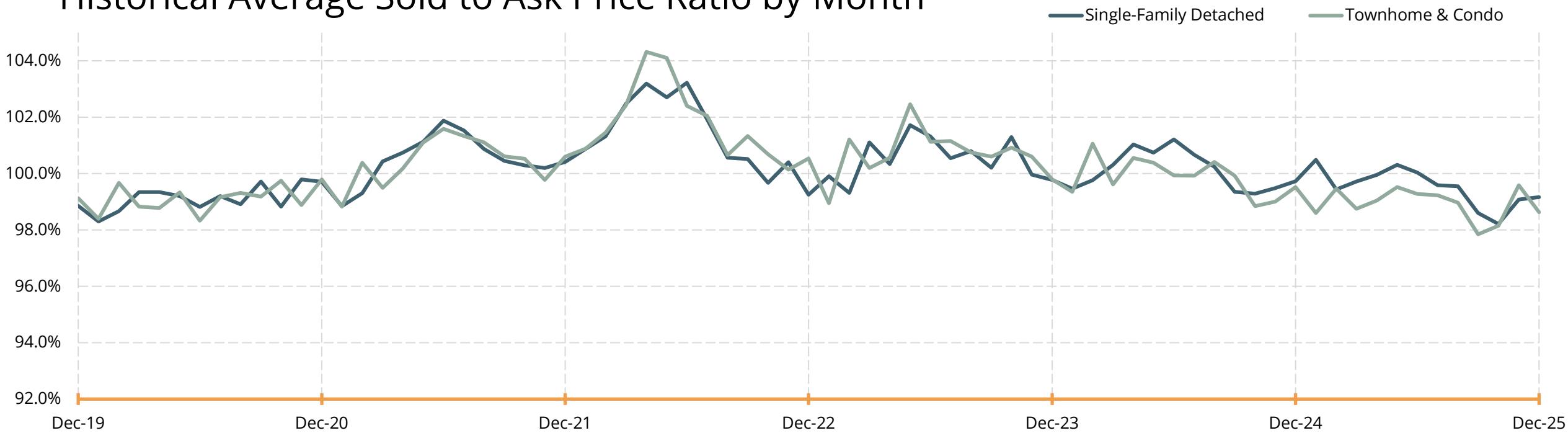
## Historical Sold Dollar Volume by Month (in millions)



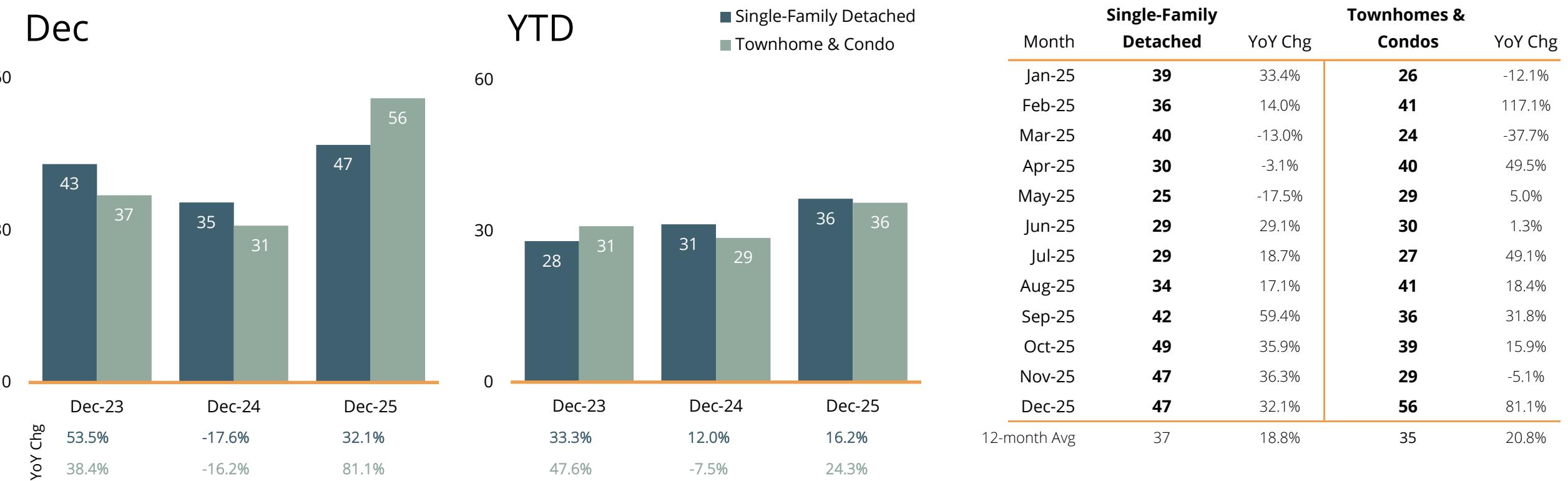
# Average Sold to Ask Price Ratio



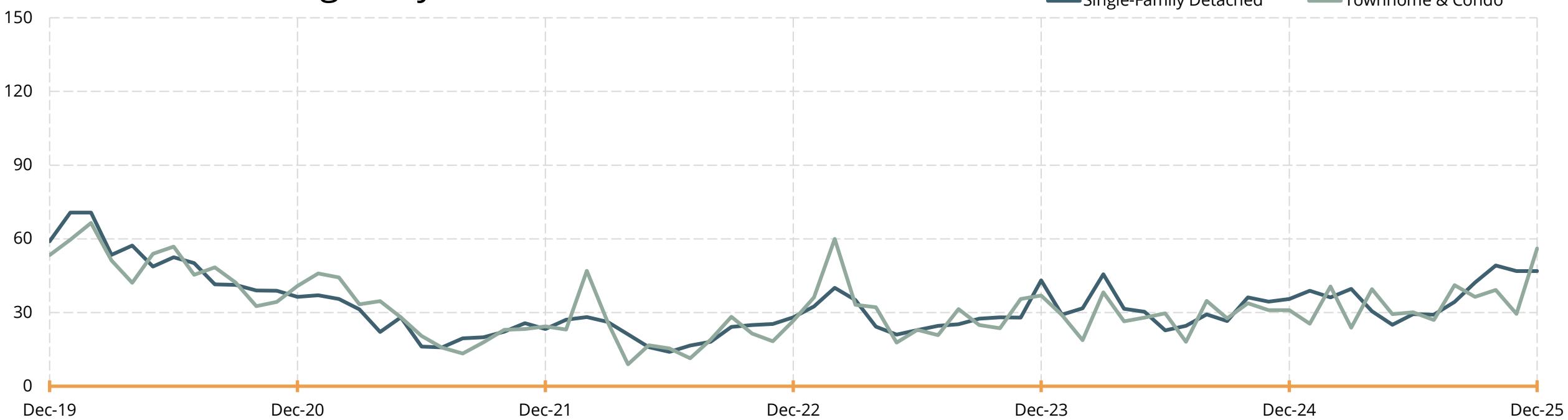
## Historical Average Sold to Ask Price Ratio by Month



# Average Days on Market

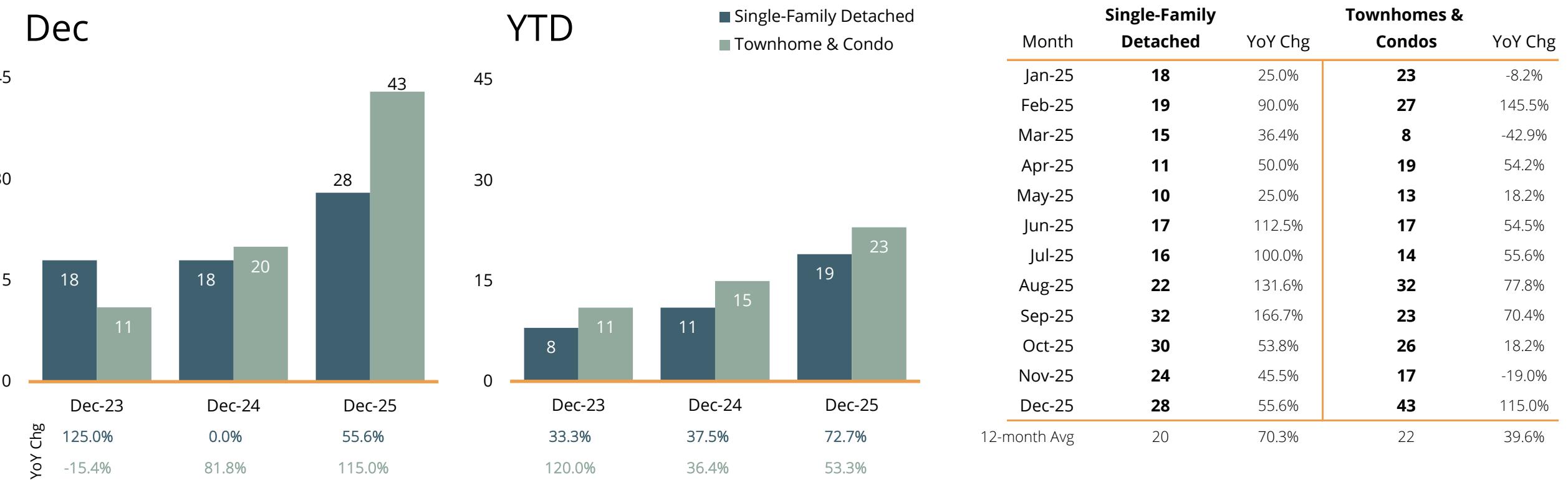


## Historical Average Days on Market

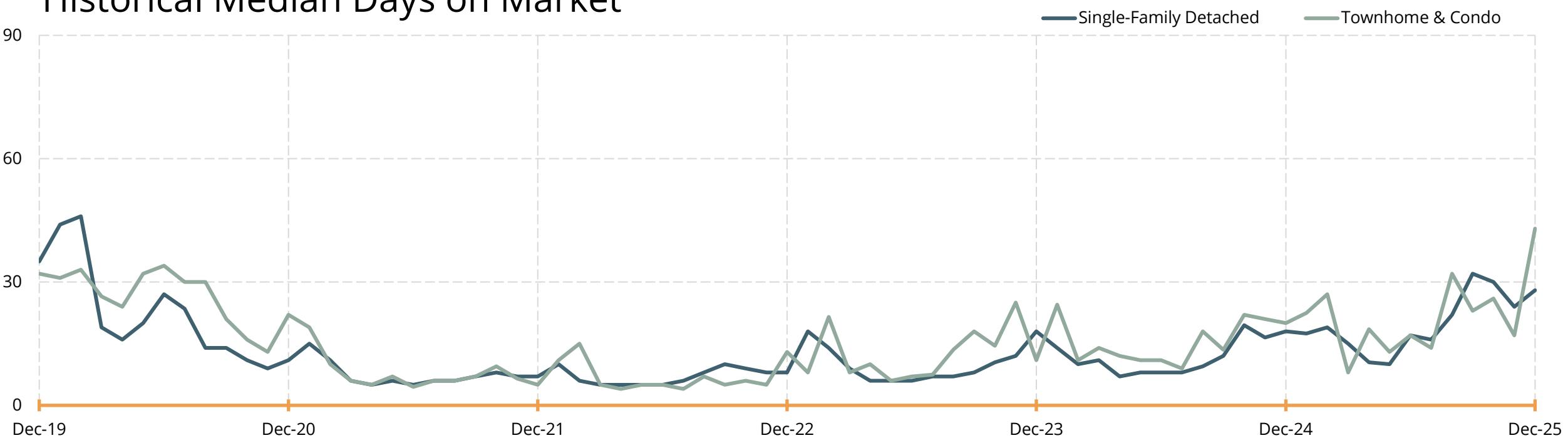


Source: Virginia REALTORS®, data accessed January 15, 2026

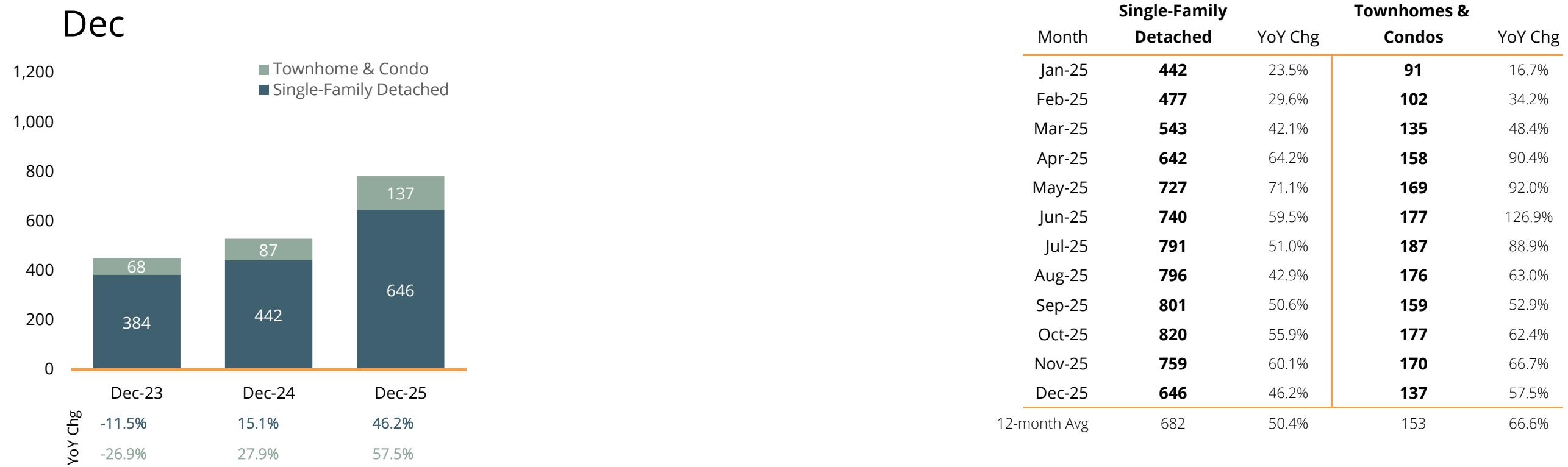
# Median Days on Market



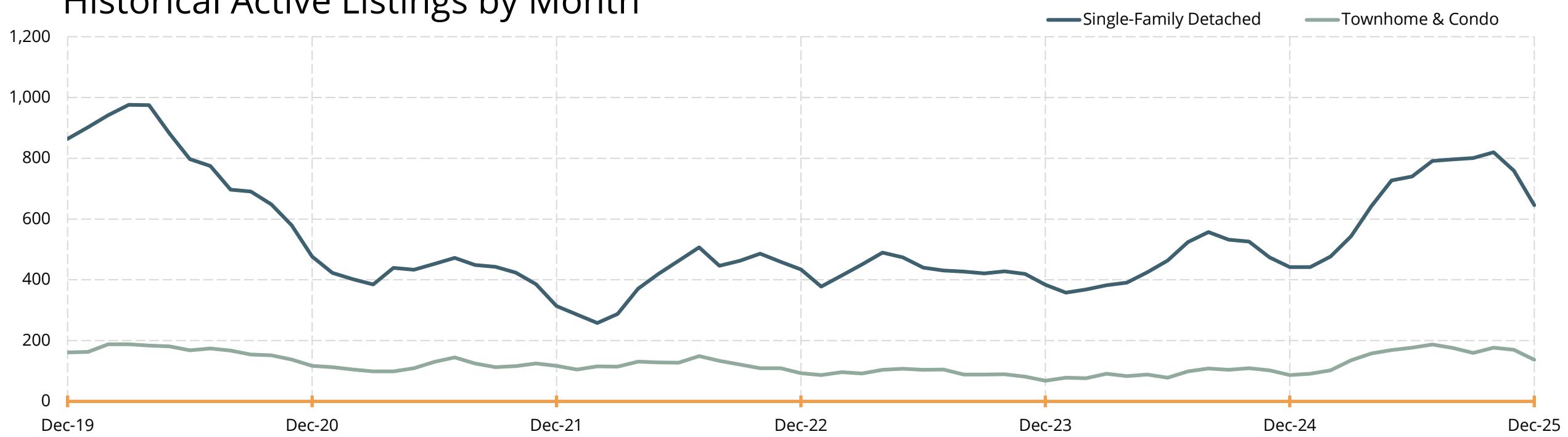
## Historical Median Days on Market



# Active Listings



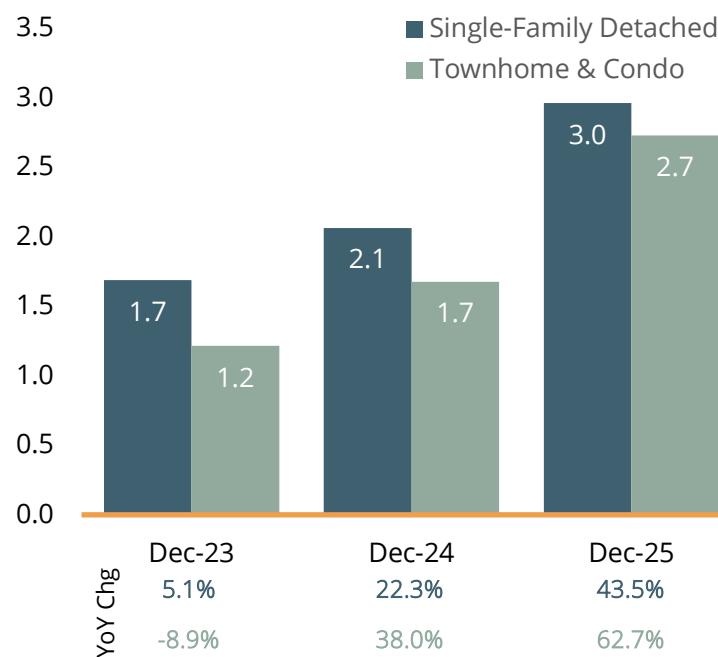
## Historical Active Listings by Month



# Months of Supply

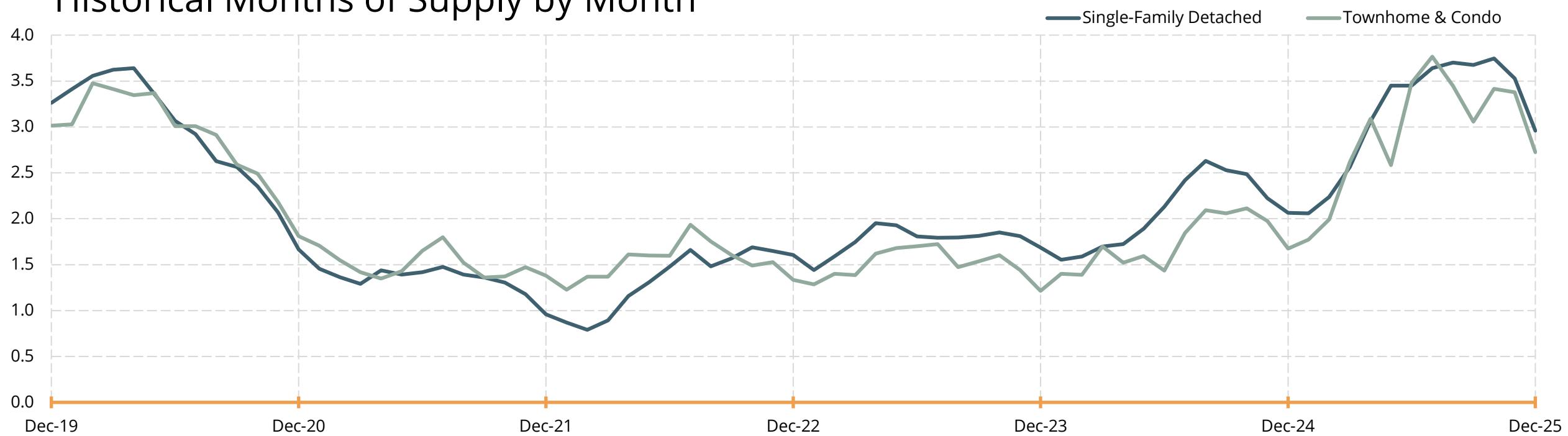


Dec



Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
Jan-25	<b>2.1</b>	32.6%	<b>1.8</b>	26.5%
Feb-25	<b>2.2</b>	41.0%	<b>2.0</b>	43.6%
Mar-25	<b>2.6</b>	50.9%	<b>2.6</b>	54.1%
Apr-25	<b>3.1</b>	77.8%	<b>3.1</b>	103.1%
May-25	<b>3.4</b>	82.5%	<b>2.6</b>	62.1%
Jun-25	<b>3.4</b>	62.0%	<b>3.5</b>	142.5%
Jul-25	<b>3.6</b>	50.5%	<b>3.8</b>	104.1%
Aug-25	<b>3.7</b>	40.7%	<b>3.4</b>	64.6%
Sep-25	<b>3.7</b>	45.3%	<b>3.1</b>	48.5%
Oct-25	<b>3.7</b>	50.7%	<b>3.4</b>	61.6%
Nov-25	<b>3.5</b>	58.7%	<b>3.4</b>	71.1%
Dec-25	<b>3.0</b>	43.5%	<b>2.7</b>	62.7%
12-month Avg	3.2	52.7%	2.9	69.8%

## Historical Months of Supply by Month



# Area Overview - Total Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg
James City County	84	<b>102</b>	21.4%	104	<b>105</b>	1.0%	\$516,827	<b>\$583,269</b>	12.9%	\$438,500	<b>\$530,000</b>	20.9%	218	<b>345</b>	58.3%	1.8	<b>2.8</b>	57.7%
Williamsburg	12	<b>8</b>	-33.3%	15	<b>27</b>	80.0%	\$479,193	<b>\$445,486</b>	-7.0%	\$403,000	<b>\$410,000</b>	1.7%	35	<b>62</b>	77.1%	2.0	<b>4.0</b>	103.0%
York County	60	<b>54</b>	-10.0%	76	<b>87</b>	14.5%	\$444,982	<b>\$513,866</b>	15.5%	\$438,755	<b>\$498,100</b>	13.5%	138	<b>192</b>	39.1%	1.7	<b>2.3</b>	35.3%
New Kent County	38	<b>35</b>	-7.9%	41	<b>48</b>	17.1%	\$459,585	<b>\$480,217</b>	4.5%	\$400,000	<b>\$480,000</b>	20.0%	131	<b>178</b>	35.9%	3.3	<b>4.2</b>	28.2%
Charles City County	1	<b>3</b>	200.0%	7	<b>3</b>	-57.1%	\$298,429	<b>\$257,000</b>	-13.9%	\$265,000	<b>\$275,000</b>	3.8%	7	<b>6</b>	-14.3%	1.7	<b>1.6</b>	-2.6%

# Area Overview - Total Market YTD



New Listings YTD				Sales YTD				Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	
James City County	1,792	<b>2,108</b>	17.6%	1,509	<b>1,496</b>	-0.9%	\$517,868	<b>\$544,997</b>	5.2%	\$450,000	<b>\$490,000</b>	8.9%	218	<b>345</b>	58.3%	
Williamsburg	256	<b>309</b>	20.7%	213	<b>187</b>	-12.2%	\$430,524	<b>\$462,740</b>	7.5%	\$397,000	<b>\$412,000</b>	3.8%	35	<b>62</b>	77.1%	
York County	993	<b>1,197</b>	20.5%	962	<b>987</b>	2.6%	\$454,901	<b>\$479,973</b>	5.5%	\$423,527	<b>\$450,000</b>	6.3%	138	<b>192</b>	39.1%	
New Kent County	640	<b>837</b>	30.8%	479	<b>511</b>	6.7%	\$458,547	<b>\$476,283</b>	3.9%	\$415,000	<b>\$445,000</b>	7.2%	131	<b>178</b>	35.9%	
Charles City County	60	<b>56</b>	-6.7%	52	<b>44</b>	-15.4%	\$306,990	<b>\$394,560</b>	28.5%	\$280,000	<b>\$304,975</b>	8.9%	7	<b>6</b>	-14.3%	

# Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg
James City County	68	<b>84</b>	23.5%	79	<b>84</b>	6.3%	\$573,763	<b>\$616,933</b>	7.5%	\$480,000	<b>\$577,500</b>	20.3%	167	<b>267</b>	59.9%	1.7	<b>3.3</b>	94.2%
Williamsburg	9	<b>5</b>	-44.4%	8	<b>19</b>	137.5%	\$518,250	<b>\$469,238</b>	-9.5%	\$455,500	<b>\$485,000</b>	6.5%	25	<b>36</b>	44.0%	2.3	<b>5.0</b>	119.3%
York County	54	<b>45</b>	-16.7%	60	<b>70</b>	16.7%	\$477,583	<b>\$558,142</b>	16.9%	\$458,750	<b>\$542,000</b>	18.1%	124	<b>162</b>	30.6%	1.9	<b>7.7</b>	300.0%
New Kent County	34	<b>34</b>	0.0%	35	<b>42</b>	20.0%	\$482,371	<b>\$503,164</b>	4.3%	\$424,990	<b>\$497,250</b>	17.0%	119	<b>175</b>	47.1%	3.3	<b>3.8</b>	17.7%
Charles City County	1	<b>3</b>	200.0%	7	<b>3</b>	-57.1%	\$298,429	<b>\$257,000</b>	-13.9%	\$265,000	<b>\$275,000</b>	3.8%	7	<b>6</b>	-14.3%	1.7	<b>6.2</b>	266.9%

# Area Overview - Single Family Detached Market YTD



New Listings YTD				Sales YTD				Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	
James City County	1,467	<b>1,683</b>	14.7%	1,202	<b>1,176</b>	-2.2%	\$559,571	<b>\$586,864</b>	4.9%	\$488,500	<b>\$534,000</b>	9.3%	167	<b>267</b>	59.9%	
Williamsburg	170	<b>207</b>	21.8%	134	<b>127</b>	-5.2%	\$487,432	<b>\$513,555</b>	5.4%	\$450,000	<b>\$472,000</b>	4.9%	25	<b>36</b>	44.0%	
York County	833	<b>988</b>	18.6%	771	<b>801</b>	3.9%	\$482,755	<b>\$514,235</b>	6.5%	\$460,000	<b>\$492,903</b>	7.2%	124	<b>162</b>	30.6%	
New Kent County	577	<b>783</b>	35.7%	434	<b>465</b>	7.1%	\$473,882	<b>\$490,227</b>	3.4%	\$433,308	<b>\$462,450</b>	6.7%	119	<b>175</b>	47.1%	
Charles City County	60	<b>56</b>	-6.7%	52	<b>44</b>	-15.4%	\$306,990	<b>\$394,560</b>	28.5%	\$280,000	<b>\$304,975</b>	8.9%	7	<b>6</b>	-14.3%	

# Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg
James City County	16	<b>18</b>	12.5%	25	<b>21</b>	-16.0%	\$336,912	<b>\$448,614</b>	33.2%	\$300,000	<b>\$362,500</b>	20.8%	51	<b>78</b>	52.9%	2.0	<b>2.9</b>	47.2%
Williamsburg	3	<b>3</b>	0.0%	7	<b>8</b>	14.3%	\$434,557	<b>\$389,074</b>	-10.5%	\$369,900	<b>\$281,451</b>	-23.9%	10	<b>26</b>	160.0%	1.5	<b>5.2</b>	251.0%
York County	6	<b>9</b>	50.0%	16	<b>17</b>	6.3%	\$322,730	<b>\$331,553</b>	2.7%	\$323,001	<b>\$335,000</b>	3.7%	14	<b>30</b>	114.3%	0.9	<b>2.0</b>	128.7%
New Kent County	4	<b>1</b>	-75.0%	6	<b>6</b>	0.0%	\$326,668	<b>\$319,583</b>	-2.2%	\$327,995	<b>\$324,750</b>	-1.0%	12	<b>3</b>	-75.0%	3.2	<b>0.8</b>	-75.5%
Charles City County	0	<b>0</b>	n/a	0	<b>0</b>	n/a	\$0	<b>\$0</b>	n/a	\$0	<b>\$0</b>	n/a	0	<b>0</b>	n/a	0.0	<b>0.0</b>	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	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	Dec-24	Dec-25	% chg	
James City County	325	<b>425</b>	30.8%	307	<b>320</b>	4.2%	\$354,567	<b>\$390,035</b>	10.0%	\$345,000	<b>\$365,000</b>	5.8%	51	<b>78</b>	52.9%	
Williamsburg	86	<b>102</b>	18.6%	79	<b>60</b>	-24.1%	\$340,479	<b>\$356,875</b>	4.8%	\$345,000	<b>\$306,500</b>	-11.2%	10	<b>26</b>	160.0%	
York County	160	<b>209</b>	30.6%	191	<b>186</b>	-2.6%	\$343,040	<b>\$325,313</b>	-5.2%	\$354,681	<b>\$330,000</b>	-7.0%	14	<b>30</b>	114.3%	
New Kent County	63	<b>54</b>	-14.3%	45	<b>46</b>	2.2%	\$315,861	<b>\$335,323</b>	6.2%	\$312,995	<b>\$329,363</b>	5.2%	12	<b>3</b>	-75.0%	
Charles City County	0	<b>0</b>	n/a	0	<b>0</b>	n/a	\$0	<b>\$0</b>	n/a	\$0	<b>\$0</b>	n/a	0	<b>0</b>	n/a	



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Data and analysis provided by Virginia REALTORS® Research Team

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