

WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

WAAR Market Indicators Report



Key Market Trends: November 2025

- There was a sharp decrease in sales activity across the WAAR footprint. The total number of sales came to 219 in November, dropping 24.5%, which is 71 fewer than a year ago. Activity fell in James City County with 43 fewer home sales (-30.1%) and Williamsburg down 25 transactions (-89.3%). New Kent County was the only market where sales increased this month (+11.4%).
- Pending sales grew this month in the region, after decreasing last month. There were 197 pending sales in the month of November, up 4.2% or eight pending sales from last year. Pending sales increased the most in New Kent County with nine additional pending sales (+23.7%) and Williamsburg with three more than the year before (+23.1%). Activity dropped for the third straight month in Charles City County with three fewer pending sales compared to a year earlier (-50.0%).
- Prices rose for the seventh straight month in the WAAR market. The median sales price was \$475,000 this month, jumping up 15.9% from a year ago, a \$65,025 price gain. There was a \$425,572 surge in sales price in Williamsburg (+121.8%) and a \$107,000 price hike in James City County (+26.6%). Homes sold in Charles City County experienced a \$141,750 decline in sales price this November (-40.6%).
- An increase in active listings led to higher supply levels in the WAAR area. At the end of November, there were 929 listings on the market, 353 more than the previous year, a 61.3% surge in activity. Most of the listing growth this month came from James City County with 132 additional listings (+52.8%) and York County with 88 more than last year (+56.8%). The number of active listings remained unchanged in Charles City County.

INTEREST RATE TRACKER



WAAR Market Dashboard

YoY Chg	Nov-25	Indicator
▼ -24.5%	219	Sales
▲ 4.2%	197	Pending Sales
▲ 17.1%	287	New Listings
▲ 14.7%	\$514,186	Average List Price
▲ 14.1%	\$508,664	Average Sales Price
▲ 15.9%	\$475,000	Median Sales Price
▲ 6.0%	\$219	Average Price Per Square Foot
▼ -13.8%	\$111.4	Sold Dollar Volume (in millions)
▼ -0.2%	99.2%	Average Sold/Ask Price Ratio
▲ 29.7%	44	Average Days on Market
▲ 26.3%	24	Median Days on Market
▲ 61.3%	929	Active Listings
▲ 60.9%	3.5	Months of Supply

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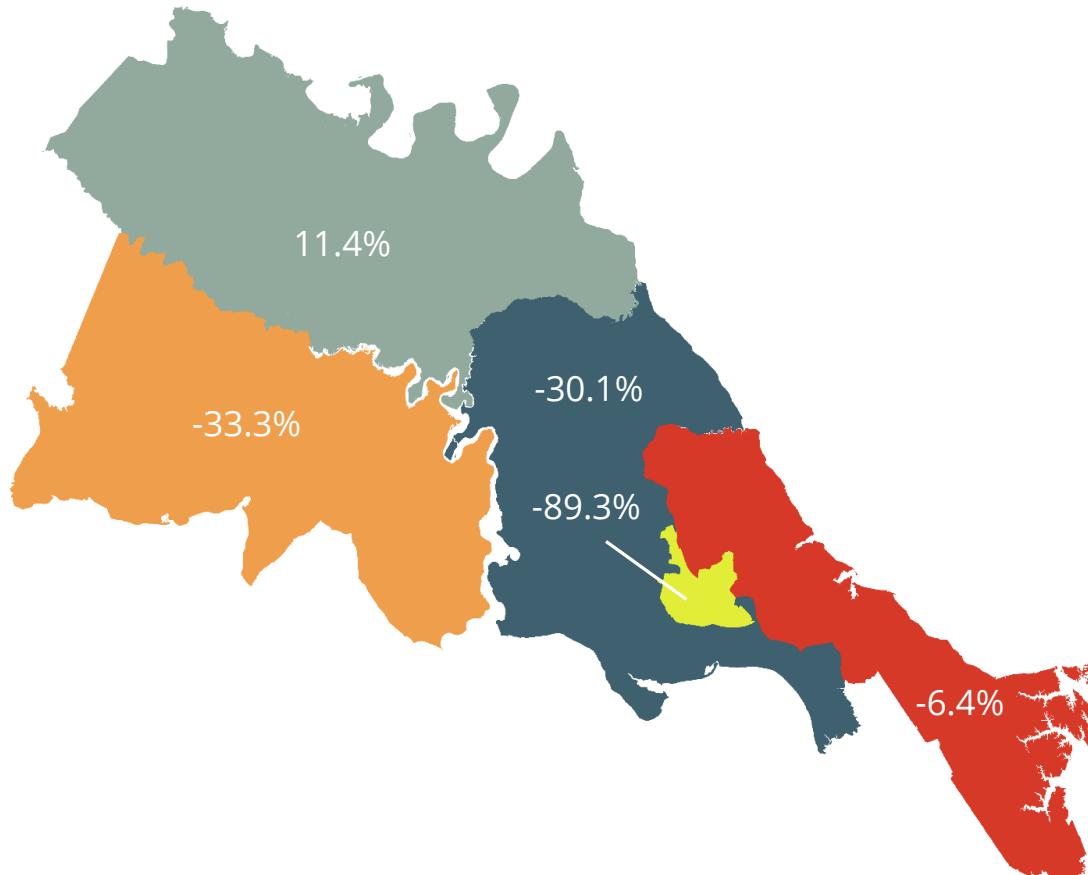
Consumers Should Consult with a REALTOR®. Buying or selling real estate, for a majority of consumers, is one of the most important decisions they will make. Choosing a real estate professional continues to be a vital part of this process.

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 Sales

Jurisdiction	Nov-24	Nov-25	% Chg
Charles City County	6	4	-33.3%
James City County	143	100	-30.1%
New Kent County	35	39	11.4%
Williamsburg	28	3	-89.3%
York County	78	73	-6.4%
WAAR	290	219	-24.5%

Total Market Overview

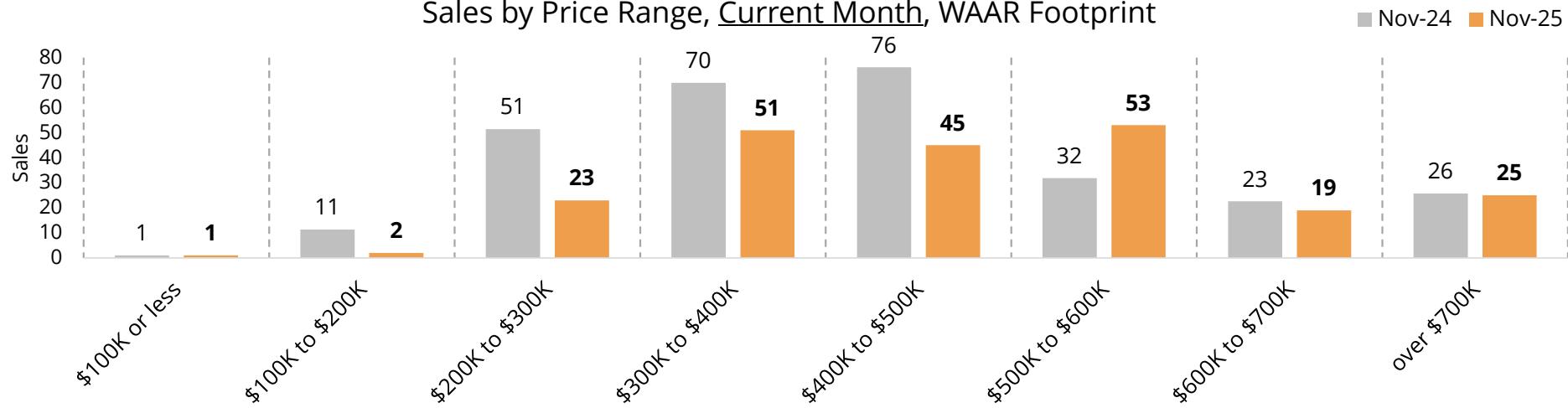


Key Metrics	2-year Trends			Nov-24	Nov-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Nov-23	Nov-24	Nov-25						
Sales		290	219	-24.5%	2,972	2,955	-0.6%		
Pending Sales		189	197	4.2%	2,647	2,720	2.8%		
New Listings		245	287	17.1%	3,546	4,305	21.4%		
Average List Price		\$448,172	\$514,186	14.7%	\$479,457	\$510,237	6.4%		
Average Sales Price		\$445,706	\$508,664	14.1%	\$479,840	\$505,830	5.4%		
Median Sales Price		\$409,975	\$475,000	15.9%	\$426,000	\$460,000	8.0%		
Average Price Per Square Foot		\$207	\$219	6.0%	\$212	\$220	3.8%		
Sold Dollar Volume (in millions)		\$129.3	\$111.4	-13.8%	\$1,420.5	\$1,489.8	4.9%		
Average Sold/Ask Price Ratio		99.4%	99.2%	-0.2%	100.2%	99.4%	-0.8%		
Average Days on Market		34	44	29.7%	31	35	15.0%		
Median Days on Market		19	24	26.3%	11	19	72.7%		
Active Listings		576	929	61.3%	n/a	n/a	n/a		
Months of Supply		2.2	3.5	60.9%	n/a	n/a	n/a		

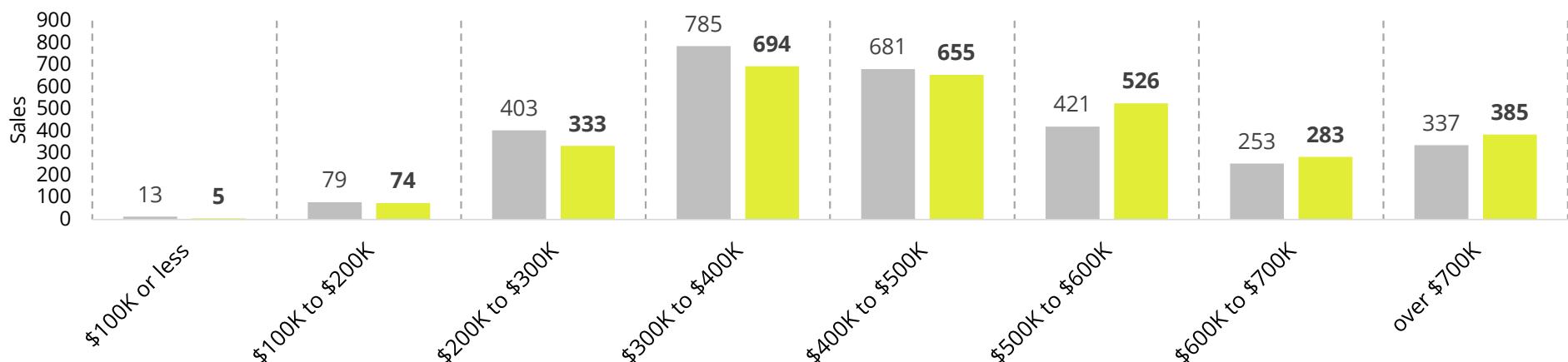
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Single-Family Detached Market Overview

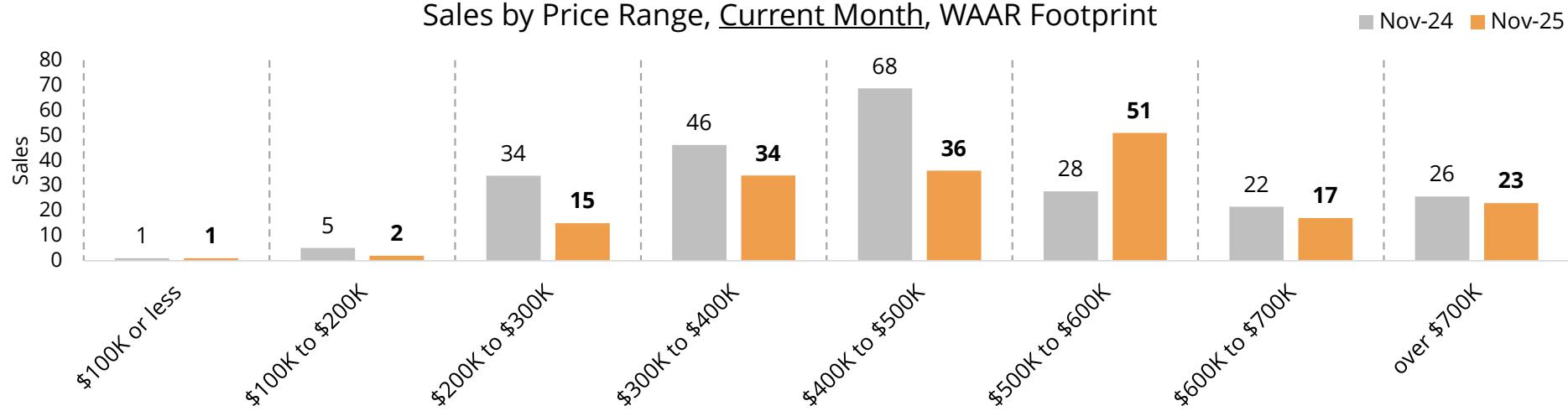


Key Metrics	2-year Trends			Nov-24	Nov-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Nov-23	Nov-24	Nov-25						
Sales		230	179	-22.2%	2,404	2,395	-0.4%		
Pending Sales		153	169	10.5%	2,237	2,285	2.1%		
New Listings		195	231	18.5%	2,941	3,546	20.6%		
Average List Price		\$478,749	\$539,872	12.8%	\$510,789	\$543,520	6.4%		
Average Sales Price		\$476,542	\$533,567	12.0%	\$511,445	\$539,038	5.4%		
Median Sales Price		\$431,000	\$505,540	17.3%	\$465,000	\$495,000	6.5%		
Average Price Per Square Foot		\$208	\$221	6.3%	\$214	\$221	3.5%		
Sold Dollar Volume (in millions)		\$109.6	\$95.5	-12.9%	\$1,223.7	\$1,287.7	5.2%		
Average Sold/Ask Price Ratio		99.5%	99.1%	-0.4%	100.2%	99.5%	-0.7%		
Average Days on Market		34	47	36.3%	31	35	14.3%		
Median Days on Market		17	24	45.5%	10	18	80.0%		
Active Listings		474	759	60.1%	n/a	n/a	n/a		
Months of Supply		2.2	3.5	58.7%	n/a	n/a	n/a		

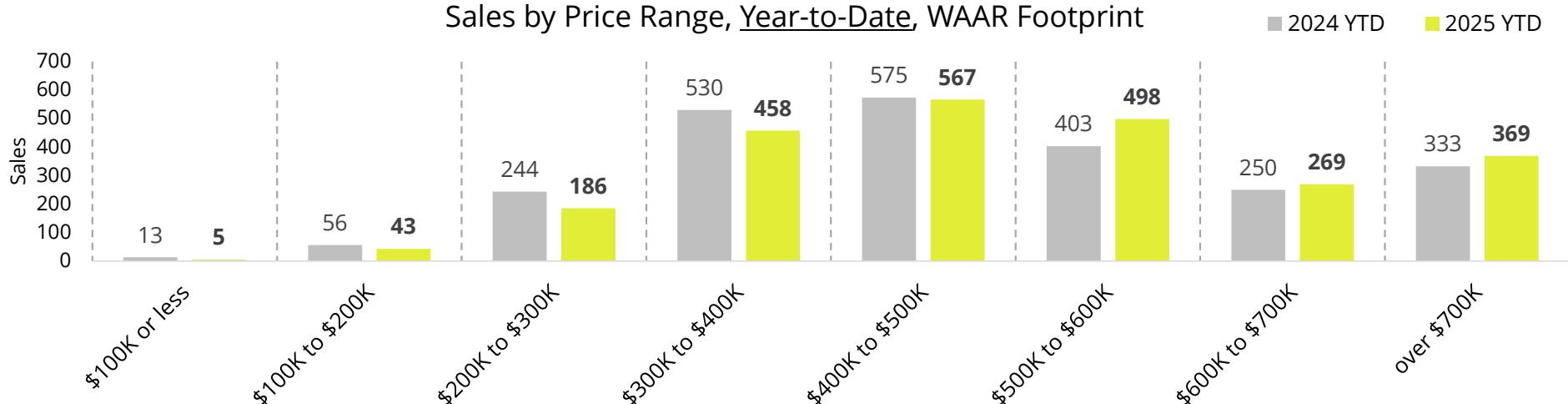
Single-Family Detached Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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

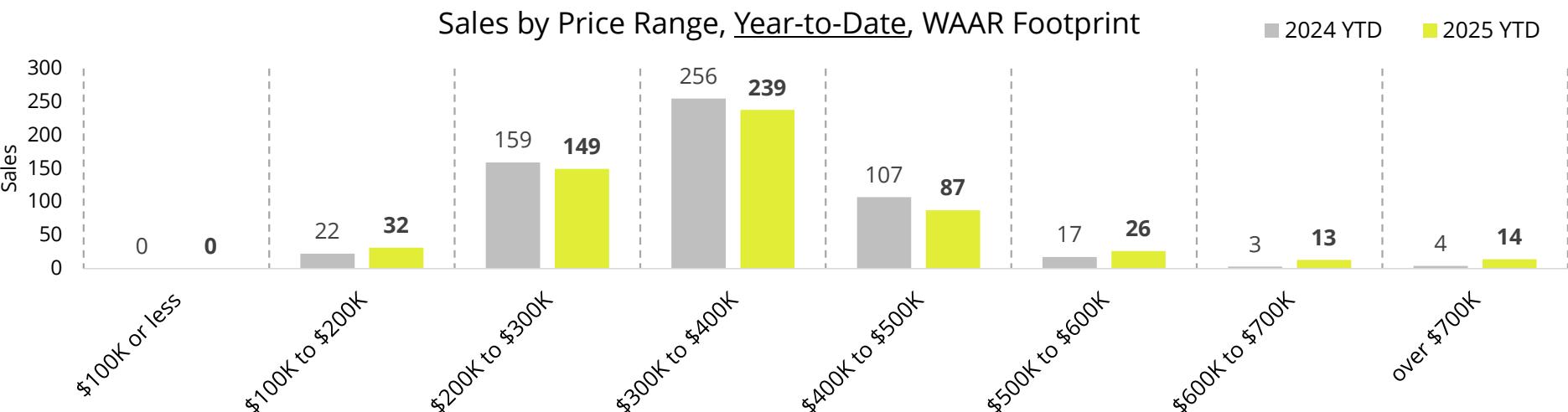
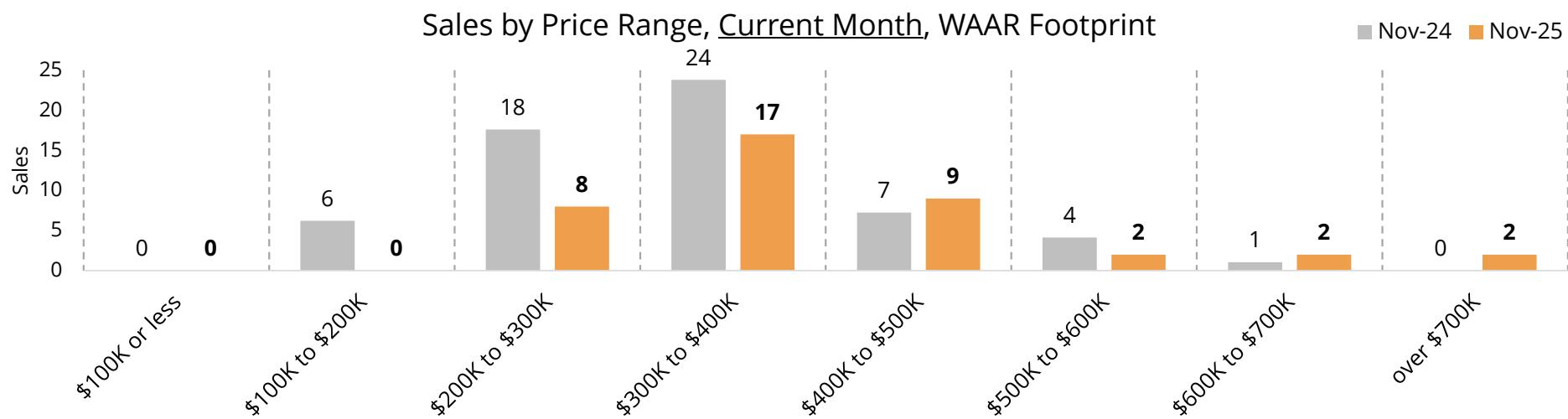


Townhome & Condo Market Overview

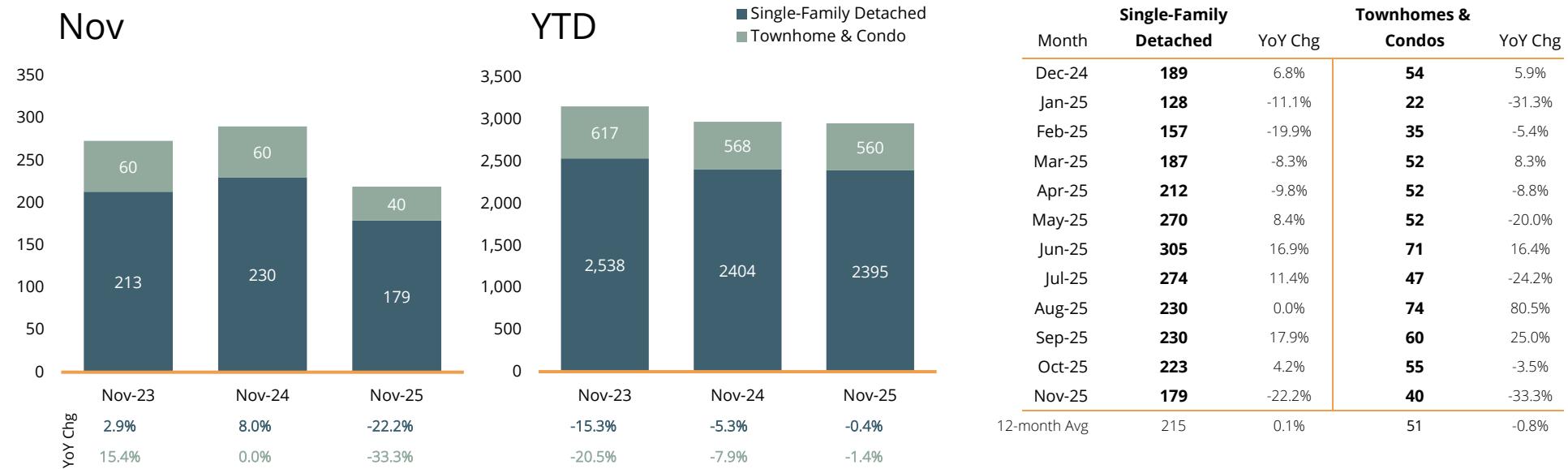


Key Metrics	2-year Trends			Nov-24	Nov-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Nov-23	2023	2024						
Sales				60	40	-33.3%	568	560	-1.4%
Pending Sales				36	28	-22.2%	410	435	6.1%
New Listings				50	56	12.0%	605	759	25.5%
Average List Price				\$330,960	\$399,240	20.6%	\$347,041	\$365,266	5.3%
Average Sales Price				\$327,502	\$397,225	21.3%	\$346,269	\$361,183	4.3%
Median Sales Price				\$315,500	\$367,450	16.5%	\$345,000	\$338,000	-2.0%
Average Price Per Square Foot				\$200	\$205	2.1%	\$197	\$208	5.6%
Sold Dollar Volume (in millions)				\$19.7	\$15.9	-19.1%	\$196.8	\$202.1	2.7%
Average Sold/Ask Price Ratio				99.0%	99.6%	0.6%	99.9%	98.9%	-1.0%
Average Days on Market				31	29	-5.1%	29	34	18.2%
Median Days on Market				21	17	-19.0%	14	20	42.9%
Active Listings				102	170	66.7%	n/a	n/a	n/a
Months of Supply				2.0	3.4	71.1%	n/a	n/a	n/a

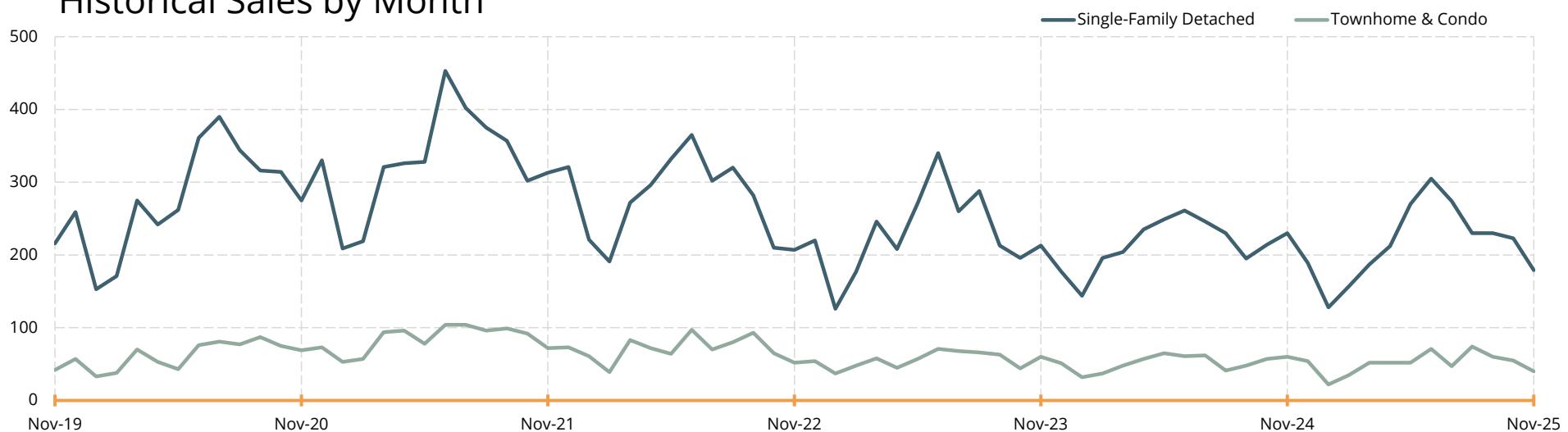
Townhome & Condo Market by Price Range



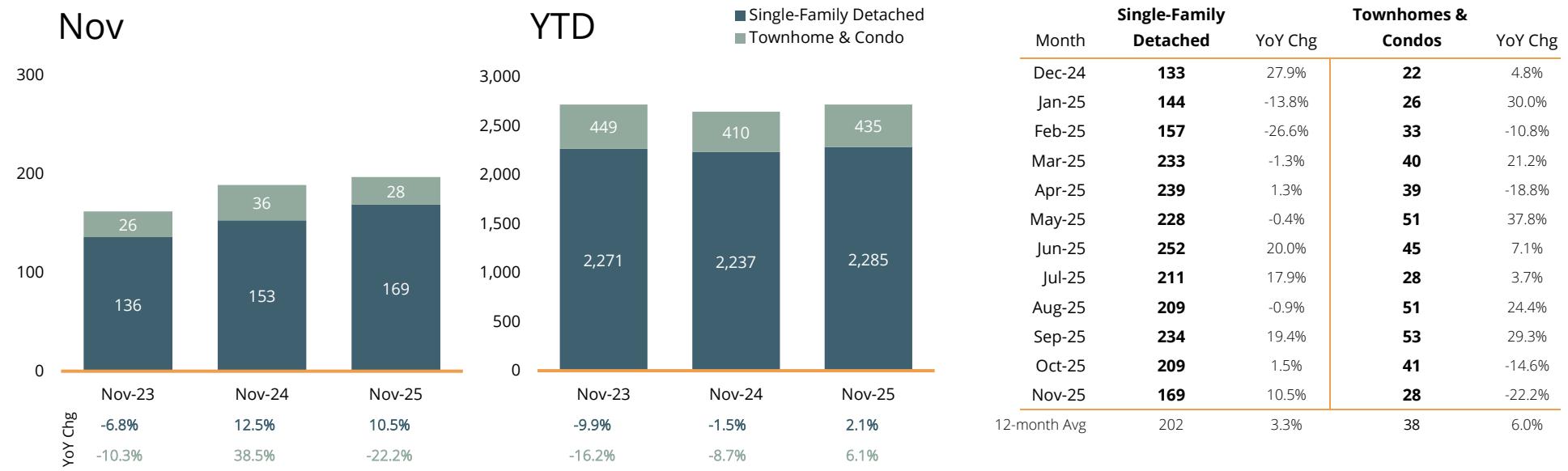
Sales



Historical Sales by Month



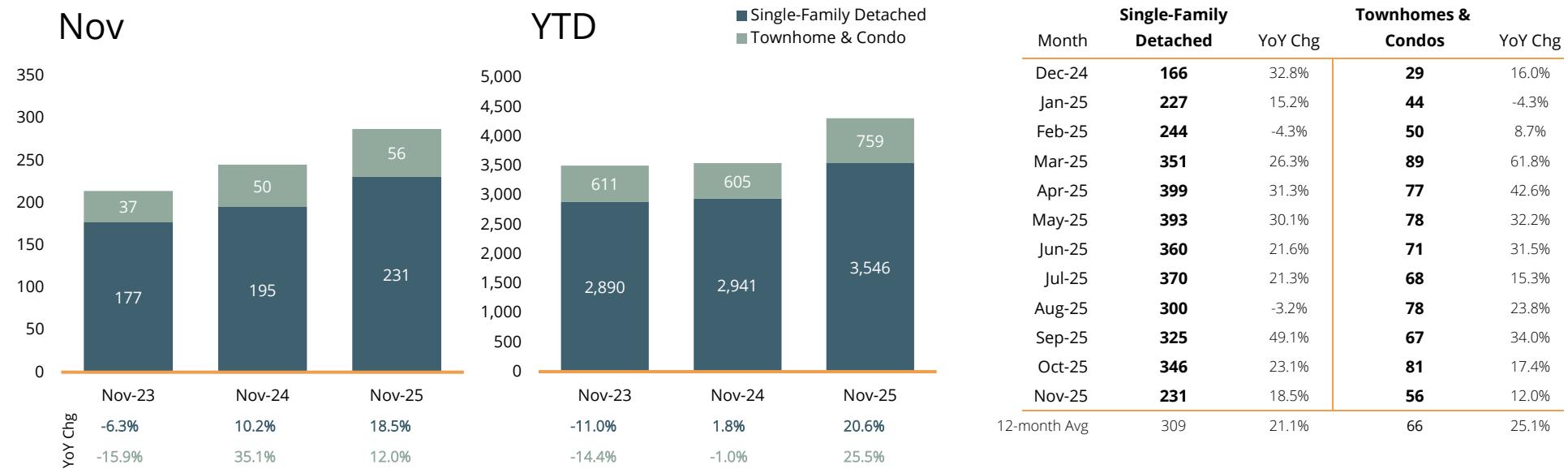
Pending Sales



Historical Pending Sales by Month



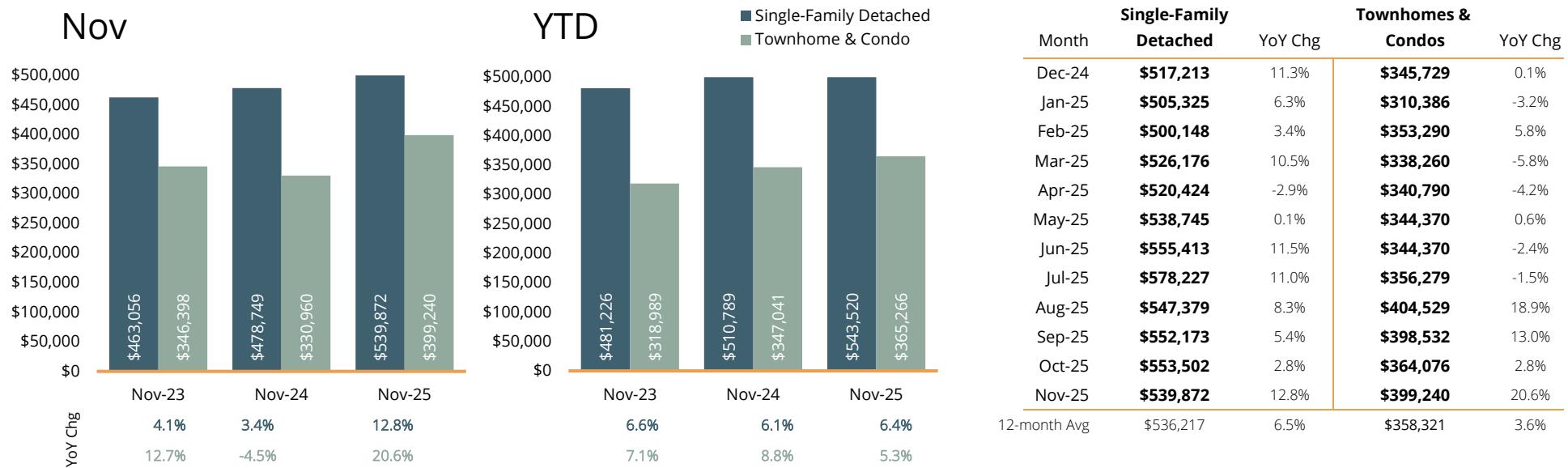
New Listings



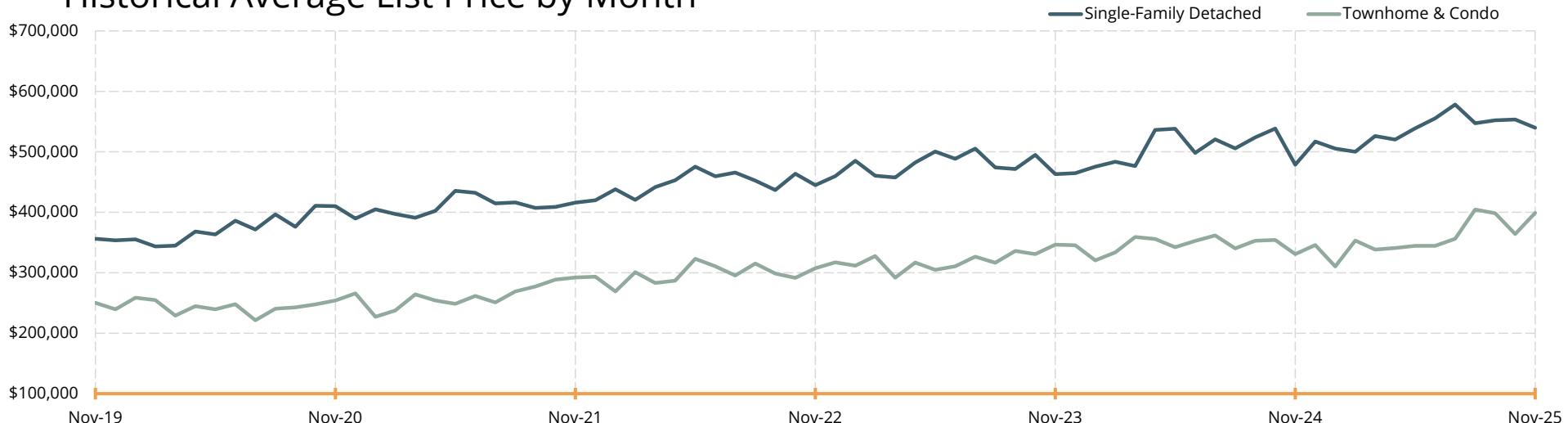
Historical New Listings by Month



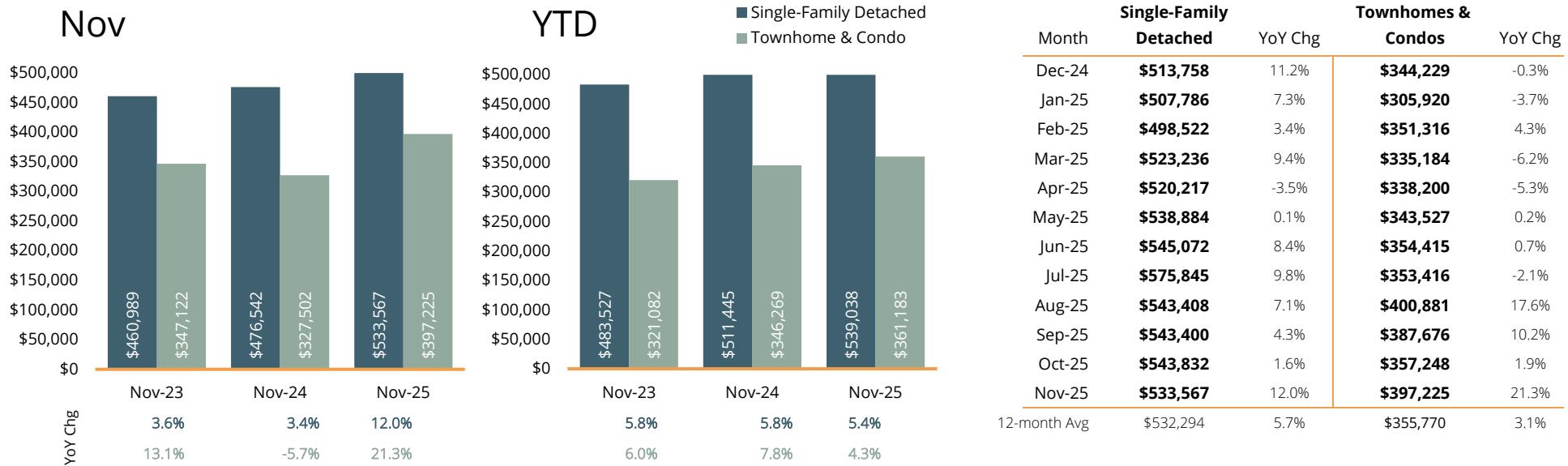
Average List Price



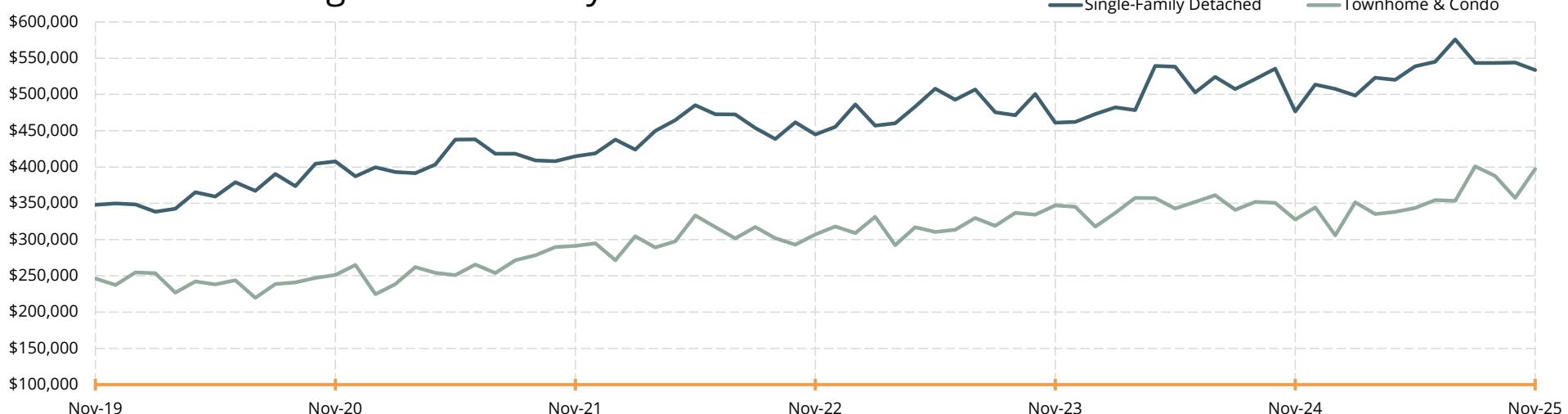
Historical Average List Price by Month



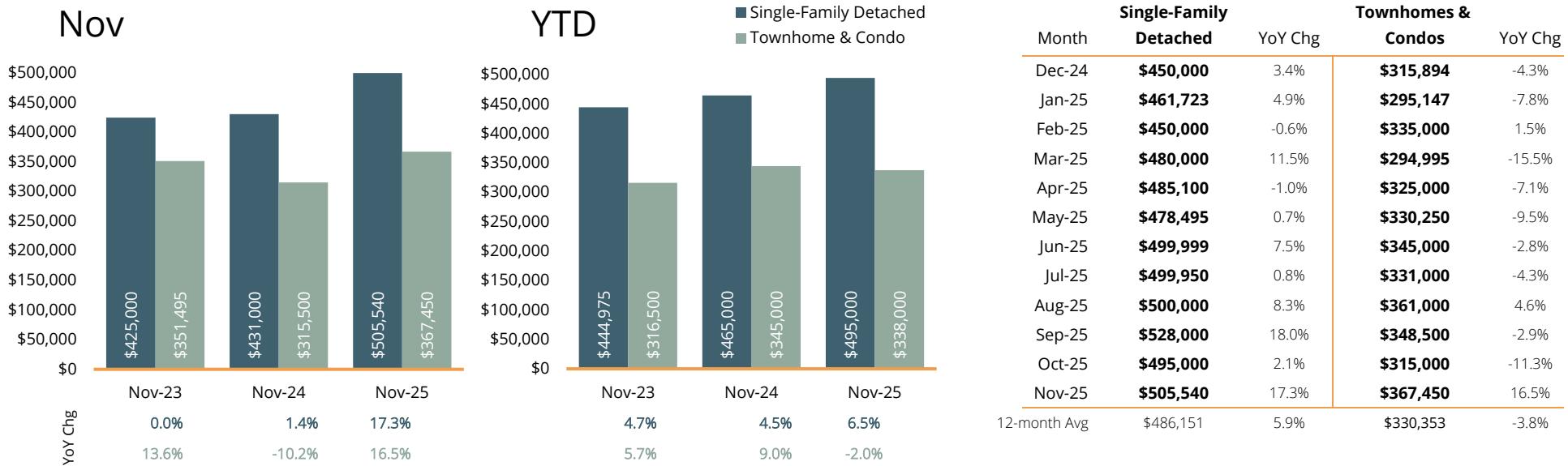
Average Sales Price



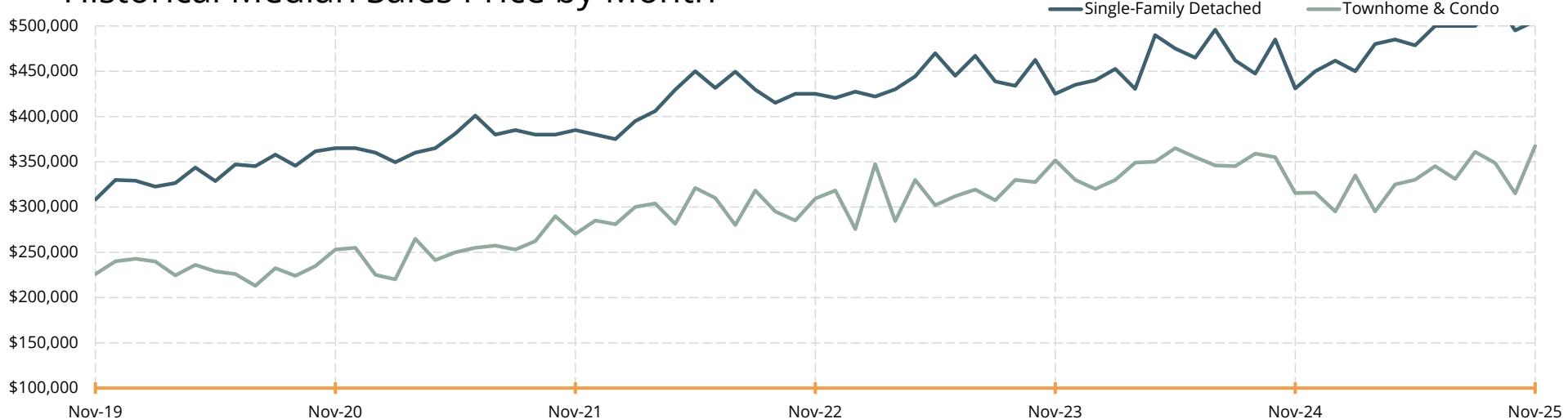
Historical Average Sales Price by Month



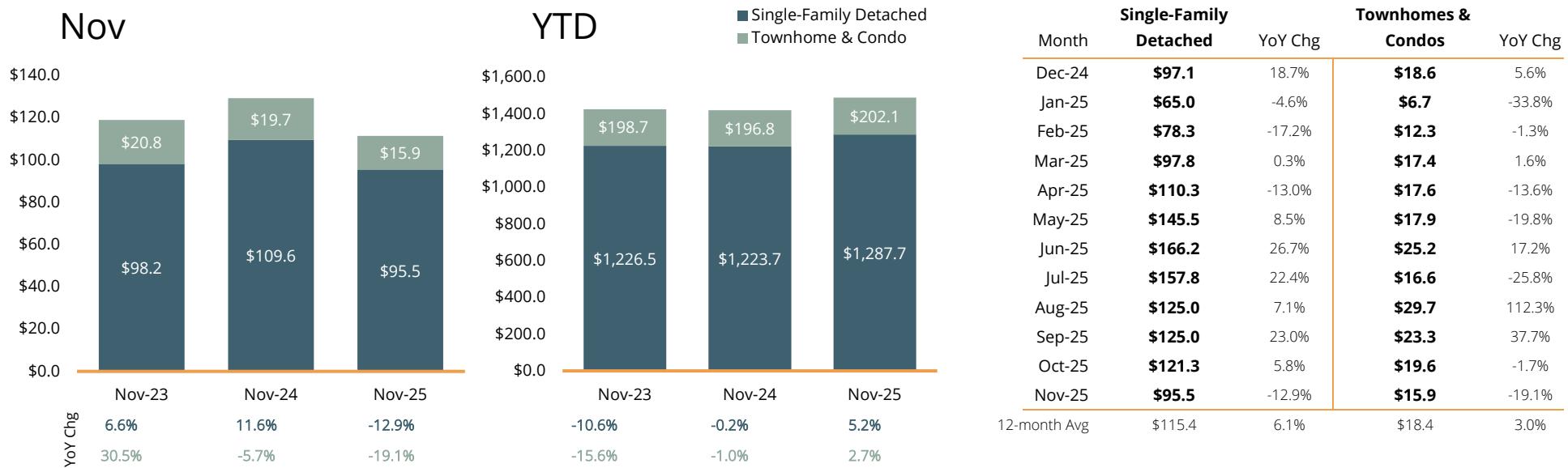
Median Sales Price



Historical Median Sales Price by Month



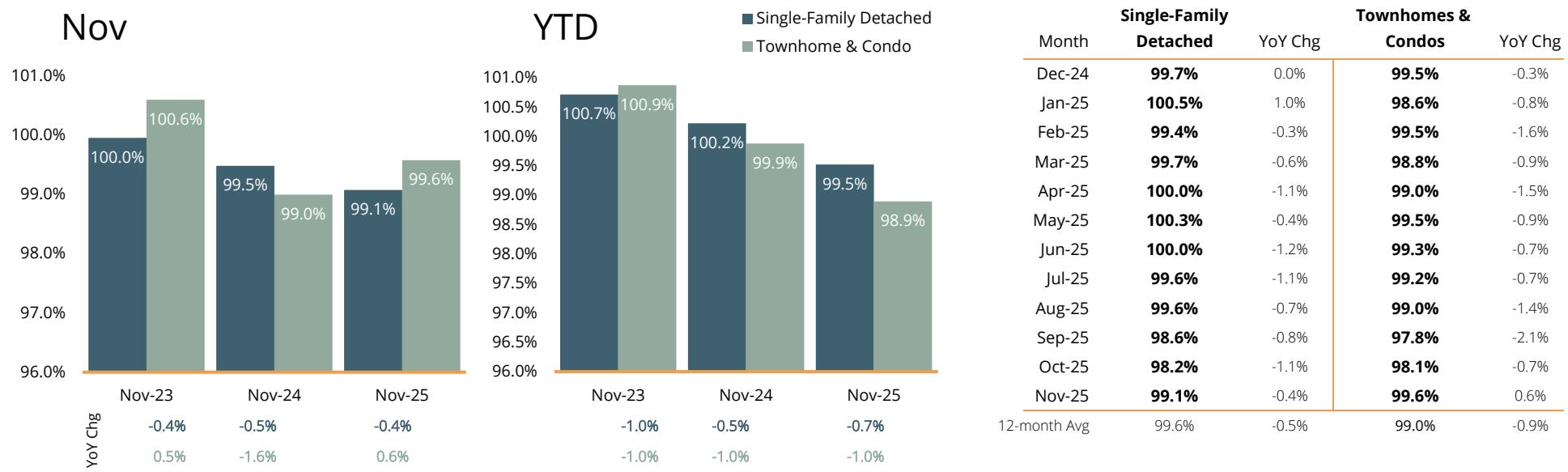
Sold Dollar Volume (in millions)



Historical Sold Dollar Volume by Month (in millions)



Average Sold to Ask Price Ratio

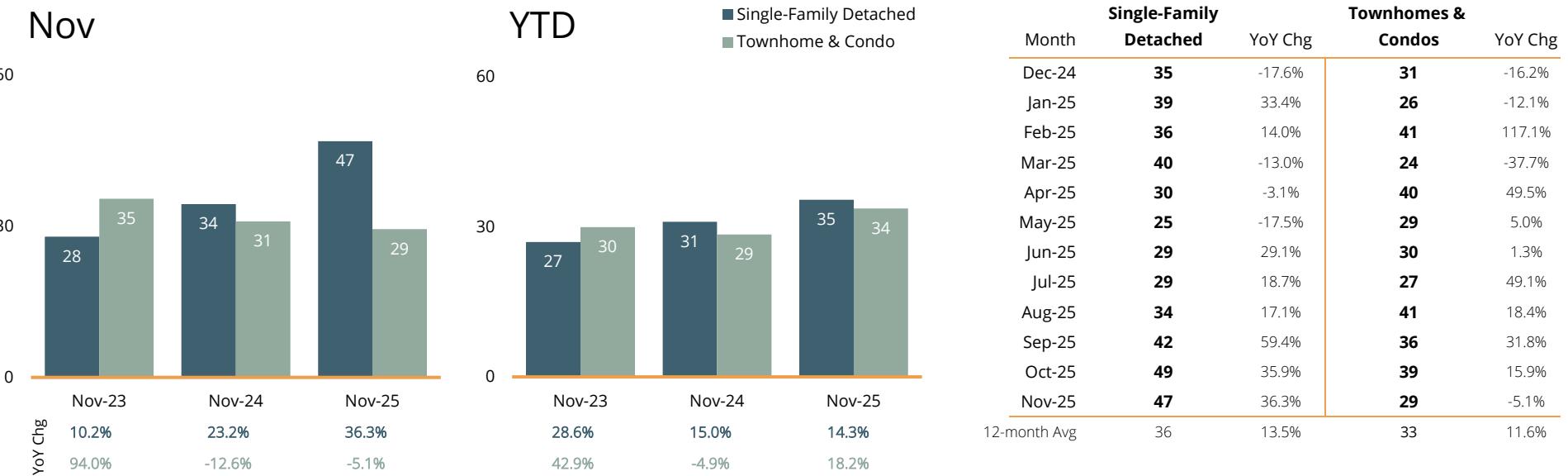


Historical Average Sold to Ask Price Ratio by Month

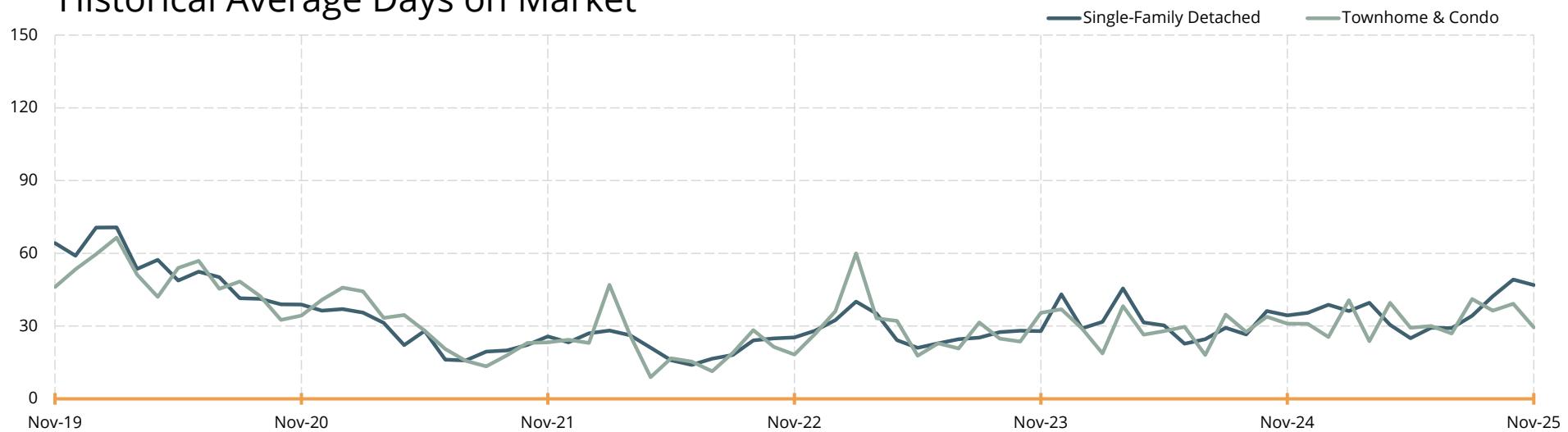
— Single-Family Detached — Townhome & Condo



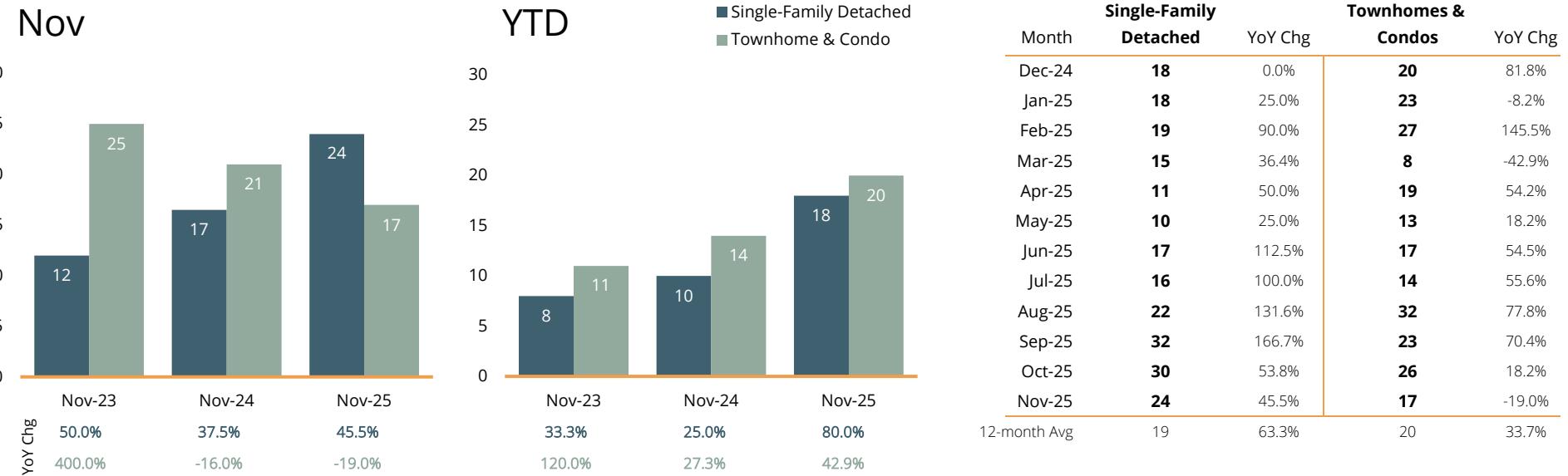
Average Days on Market



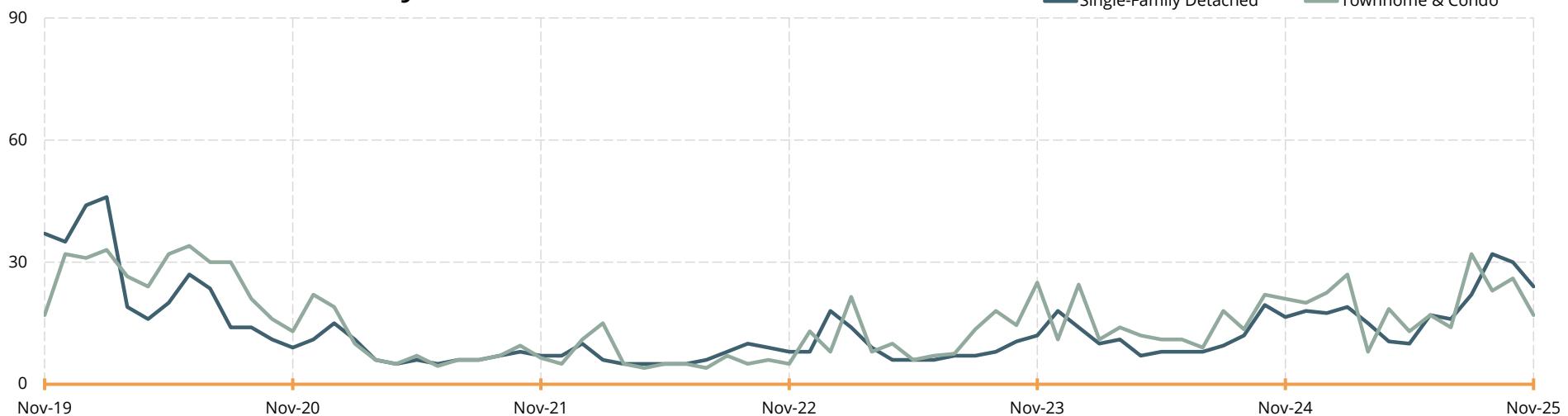
Historical Average Days on Market



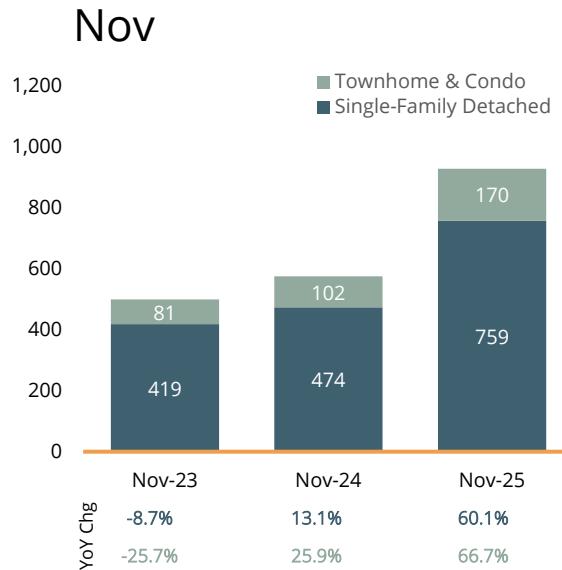
Median Days on Market



Historical Median Days on Market

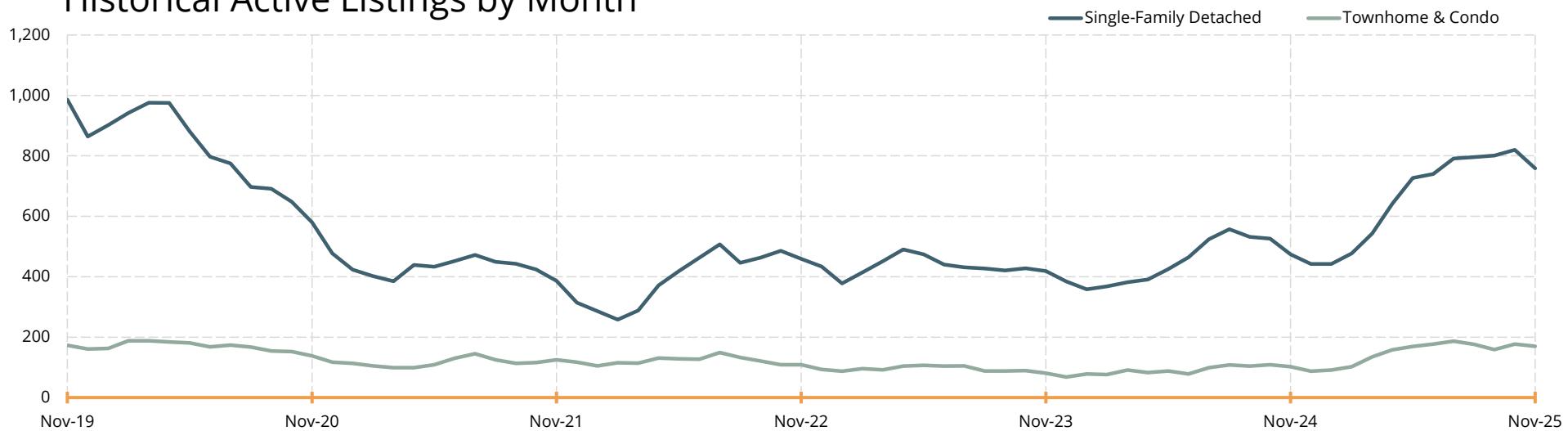


Active Listings



Month	Single-Family Detached	YoY Chg	Townhomes & Condos	
			Condos	YoY Chg
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%
Nov-25	759	60.1%	170	66.7%
12-month Avg	665	48.2%	149	64.9%

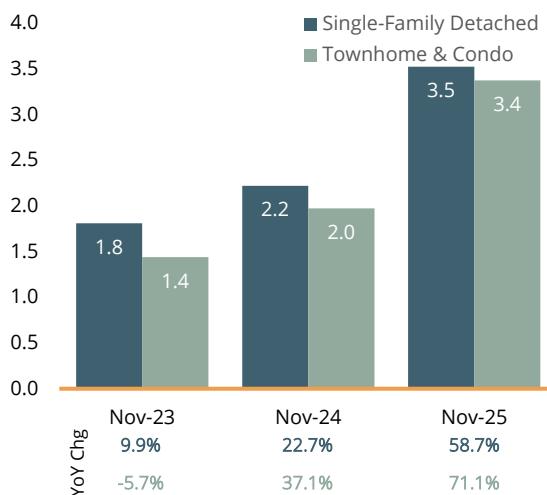
Historical Active Listings by Month



Months of Supply

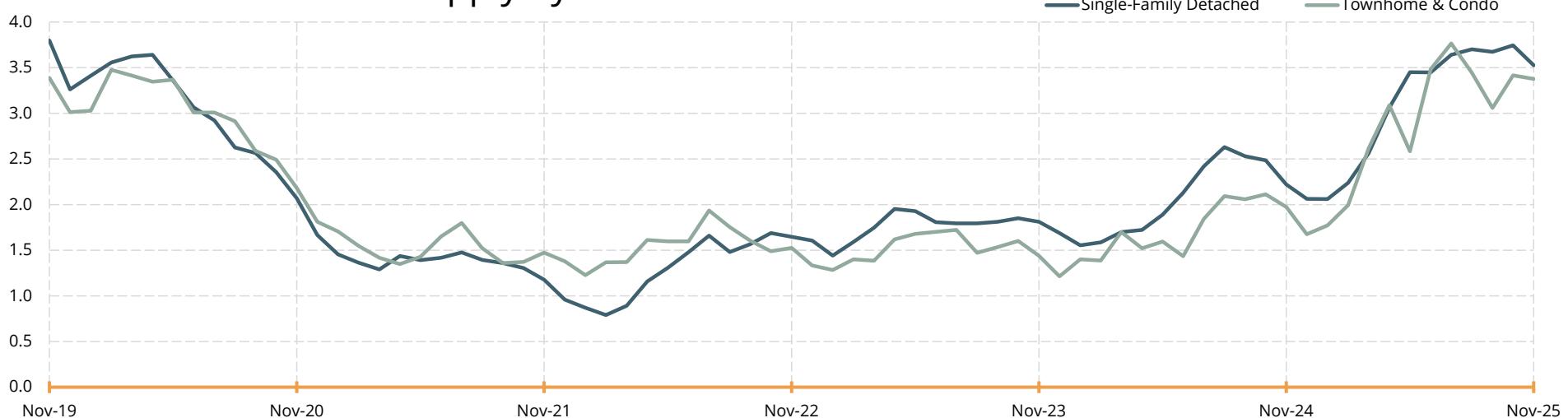


Nov



Month	Single-Family Detached	YoY Chg	Townhomes & Condos	
			Condos	YoY Chg
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%
Nov-25	3.5	58.7%	3.4	71.1%
12-month Avg	3.1	51.4%	2.9	68.5%

Historical Months of Supply by Month



Area Overview - Total Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg
James City County	113	101	-10.6%	143	100	-30.1%	\$459,860	\$558,619	21.5%	\$403,000	\$510,000	26.6%	250	382	52.8%	2.0	3.1	52.8%
Williamsburg	15	34	126.7%	28	3	-89.3%	\$386,131	\$769,967	99.4%	\$349,328	\$774,900	121.8%	35	94	168.6%	1.9	6.6	251.3%
York County	63	79	25.4%	78	73	-6.4%	\$452,522	\$459,437	1.5%	\$429,173	\$425,000	-1.0%	155	243	56.8%	2.0	3.0	49.7%
New Kent County	50	69	38.0%	35	39	11.4%	\$437,584	\$485,175	10.9%	\$420,000	\$430,000	2.4%	126	200	58.7%	3.1	4.8	54.6%
Charles City County	4	4	0.0%	6	4	-33.3%	\$345,158	\$191,250	-44.6%	\$349,250	\$207,500	-40.6%	10	10	0.0%	2.7	2.5	-6.2%

Area Overview - Total Market YTD



New Listings YTD				Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg
James City County	1,708	2,006	17.4%	1,405	1,391	-1.0%	\$517,343	\$542,106	4.8%	\$450,000	\$485,000	7.8%	250	382	52.8%
Williamsburg	244	301	23.4%	198	160	-19.2%	\$426,100	\$465,688	9.3%	\$396,000	\$413,000	4.3%	35	94	168.6%
York County	933	1,143	22.5%	886	900	1.6%	\$455,222	\$476,838	4.7%	\$421,665	\$448,320	6.3%	155	243	56.8%
New Kent County	602	802	33.2%	438	463	5.7%	\$458,448	\$475,875	3.8%	\$416,000	\$445,000	7.0%	126	200	58.7%
Charles City County	59	53	-10.2%	45	41	-8.9%	\$308,005	\$404,625	31.4%	\$280,000	\$310,000	10.7%	10	10	0.0%

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg
James City County	85	74	-12.9%	104	81	-22.1%	\$506,515	\$582,035	14.9%	\$463,225	\$530,000	14.4%	194	292	50.5%	2.0	3.0	53.0%
Williamsburg	12	23	91.7%	19	3	-84.2%	\$421,824	\$769,967	82.5%	\$380,000	\$774,900	103.9%	22	60	172.7%	1.9	6.4	240.3%
York County	50	63	26.0%	70	55	-21.4%	\$469,020	\$504,108	7.5%	\$455,000	\$485,000	6.6%	135	204	51.1%	2.2	3.1	41.4%
New Kent County	44	67	52.3%	31	36	16.1%	\$451,937	\$487,857	7.9%	\$462,990	\$434,500	-6.2%	113	193	70.8%	3.1	5.1	64.8%
Charles City County	4	4	0.0%	6	4	-33.3%	\$345,158	\$191,250	-44.6%	\$349,250	\$207,500	-40.6%	10	10	0.0%	2.7	2.5	-6.2%

Area Overview - Single Family Detached Market YTD



New Listings YTD				Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg
James City County	1,399	1,599	14.3%	1,123	1,092	-2.8%	\$557,631	\$584,553	4.8%	\$488,003	\$530,000	8.6%	194	292	50.5%
Williamsburg	161	202	25.5%	126	108	-14.3%	\$483,924	\$521,499	7.8%	\$449,950	\$471,000	4.7%	22	60	172.7%
York County	779	943	21.1%	711	731	2.8%	\$482,795	\$510,289	5.7%	\$460,000	\$489,195	6.3%	135	204	51.1%
New Kent County	543	749	37.9%	399	423	6.0%	\$473,126	\$488,942	3.3%	\$436,350	\$459,950	5.4%	113	193	70.8%
Charles City County	59	53	-10.2%	45	41	-8.9%	\$308,005	\$404,625	31.4%	\$280,000	\$310,000	10.7%	10	10	0.0%

Area Overview - Townhome & Condo Market



New Listings				Sales				Average Sales Price			Median Sales Price			Active Listings			Months Supply		
Geography	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	
James City County	28	27	-3.6%	39	19	-51.3%	\$335,446	\$458,790	36.8%	\$319,000	\$440,000	37.9%	56	90	60.7%	2.2	3.4	51.2%	
Williamsburg	3	11	266.7%	9	0	-100.0%	\$310,778	\$0	-100.0%	\$294,000	\$0	-100.0%	13	34	161.5%	1.9	6.9	272.4%	
York County	13	16	23.1%	8	18	125.0%	\$308,165	\$322,944	4.8%	\$311,000	\$330,500	6.3%	20	39	95.0%	1.3	2.6	102.7%	
New Kent County	6	2	-66.7%	4	3	-25.0%	\$326,345	\$453,000	38.8%	\$331,095	\$380,000	14.8%	13	7	-46.2%	3.2	1.8	-42.6%	
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	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	Nov-24	Nov-25	% chg	
James City County	309	407	31.7%	282	299	6.0%	\$356,189	\$385,893	8.3%	\$347,500	\$365,000	5.0%	56	90	60.7%	
Williamsburg	83	99	19.3%	72	52	-27.8%	\$331,333	\$351,921	6.2%	\$344,950	\$312,500	-9.4%	13	34	161.5%	
York County	154	200	29.9%	175	169	-3.4%	\$344,293	\$324,658	-5.7%	\$355,500	\$325,000	-8.6%	20	39	95.0%	
New Kent County	59	53	-10.2%	39	40	2.6%	\$314,240	\$337,684	7.5%	\$312,995	\$329,363	5.2%	13	7	-46.2%	
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.