

APRIL  
**2026**

# BRAR BLUE RIDGE

## MARKET INDICATORS REPORT

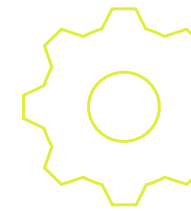
CUSTOM REPORT PREPARED BY  
**VIRGINIA REALTORS®**

# BRAR Market Indicators Report



## Key Market Trends: April 2026

- Activity increased slightly compared to last year, marking the third consecutive month of year-over-year growth.** In April, there were 215 closed sales in the region, two more than a year ago (+0.9%). Warren County (+14.0%) and Clarke County (+64.3%) were the only local markets to see an uptick in sales compared to last April. Both Frederick County (-7.2%) and Winchester (-12.9%) recorded fewer sales than the previous year.
- Pending sales remained flat from a year ago.** Regionwide, the total number of pending sales in April was 295, unchanged from the year before. There were 12 more pending sales in Clarke County (+63.2%) and Warren County (+18.8%) than last April. Frederick County had 163 pending sales in April, down 7.4% or 13 fewer than the year prior.
- Most areas saw a rise in home prices in April.** Homes sold for a median of \$439,000 this month, rising \$29,000 year-over-year (+7.1%). Winchester's median sales price reached \$399,990 in April, a 2.2% climb from a year ago, up \$8,693. Warren County had a median sales price of \$430,000 in April, a \$75,000 increase from a year earlier (+21.1%).
- Listings rose across all markets at the end of April.** There was a total of 561 active listings at the end of the month, a 21.7% rise from last year, which is 100 more listings. Frederick County recorded 333 active listings at the end of April, a 16.8% increase from a year ago. Winchester (+60.0%) and Clarke County (+44.0%) had the most notable increases in listings year-over-year.



BRAR Market Dashboard

YoY Chg	Apr-26	Indicator
▲ 0.9%	215	Sales
— 0.0%	295	Pending Sales
▲ 19.7%	486	New Listings
▲ 5.3%	\$440,000	Median List Price
▲ 7.1%	\$439,000	Median Sales Price
▼ -3.2%	\$212	Median Price Per Square Foot
▲ 7.3%	\$103.6	Sold Dollar Volume (in millions)
— 0.0%	100.0%	Median Sold/Ask Price Ratio
▲ 12.8%	35	Average Days on Market
▲ 21.7%	561	Active Listings
▲ 26.4%	2.5	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.

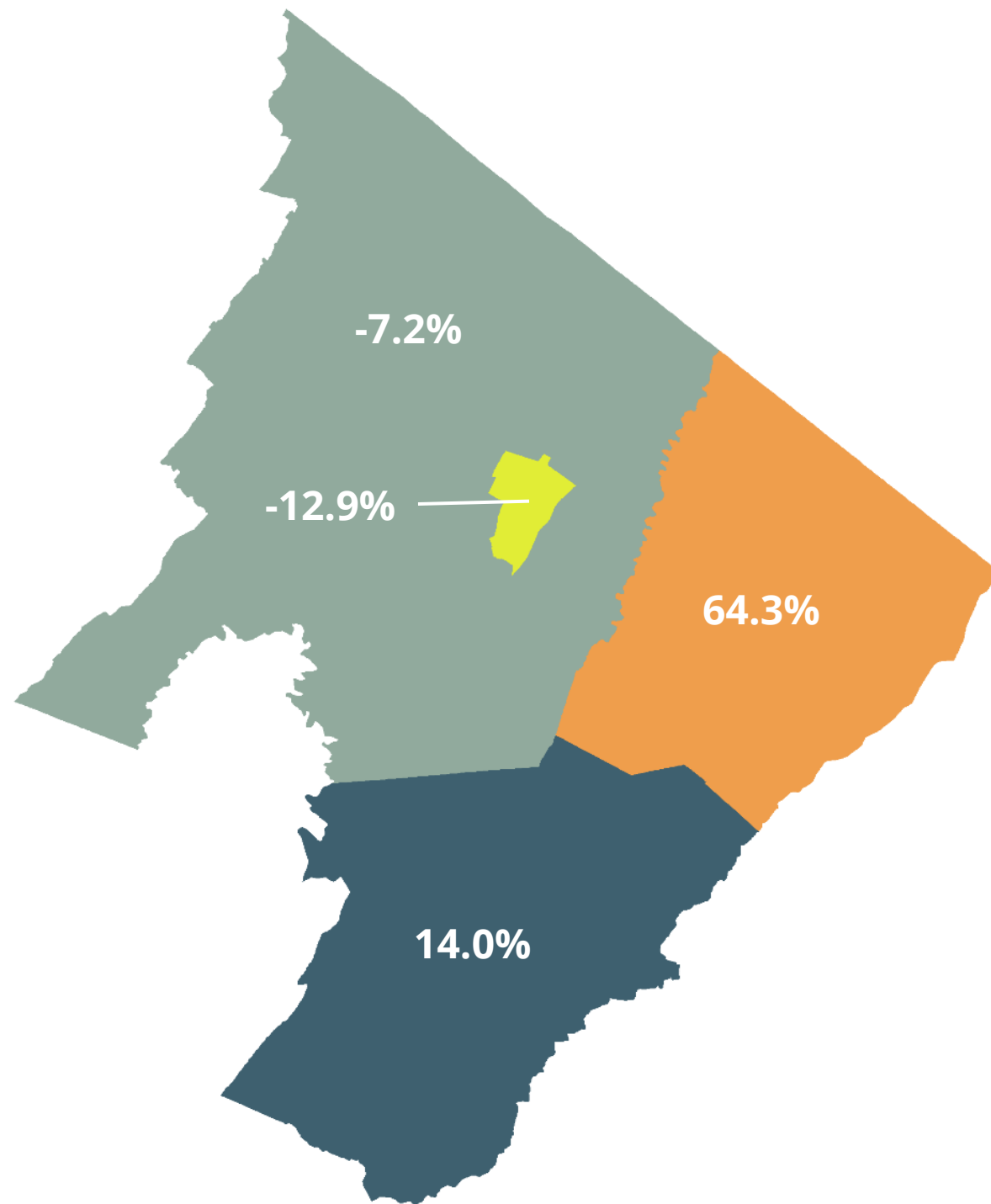
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

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

Contact an experienced REALTOR®.



# Market Activity - BRAR Footprint



<i>Jurisdiction</i>	Total Sales		
	Apr-25	Apr-26	% Chg
Clarke County	14	23	64.3%
Frederick County	125	116	-7.2%
Warren County	43	49	14.0%
Winchester	31	27	-12.9%
<b>BRAR</b>	<b>213</b>	<b>215</b>	<b>0.9%</b>

# Total Market Overview



Key Metrics	2-year Trends		Apr-25	Apr-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Apr-24	Apr-26						
Sales			213	<b>215</b>	0.9%	716	<b>753</b>	5.2%
Pending Sales			295	<b>295</b>	0.0%	892	<b>956</b>	7.2%
New Listings			406	<b>486</b>	19.7%	1,250	<b>1,484</b>	18.7%
Median List Price			\$418,000	<b>\$440,000</b>	5.3%	\$420,000	<b>\$419,990</b>	0.0%
Median Sales Price			\$410,000	<b>\$439,000</b>	7.1%	\$419,900	<b>\$410,000</b>	-2.4%
Median Price Per Square Foot			\$219	<b>\$212</b>	-3.2%	\$213	<b>\$211</b>	-1.3%
Sold Dollar Volume (in millions)			\$96.6	<b>\$103.6</b>	7.3%	\$335.4	<b>\$362.0</b>	7.9%
Median Sold/Ask Price Ratio			100.0%	<b>100.0%</b>	0.0%	100.0%	<b>100.0%</b>	0.0%
Average Days on Market			31	<b>35</b>	12.8%	38	<b>49</b>	26.5%
Active Listings			461	<b>561</b>	21.7%	n/a	<b>n/a</b>	n/a
Months of Supply			2.0	<b>2.5</b>	26.4%	n/a	<b>n/a</b>	n/a

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

# Single-Family Detached Market Overview



Key Metrics	2-year Trends		Apr-25	Apr-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Apr-24	Apr-26						
Sales			176	<b>178</b>	1.1%	589	<b>614</b>	4.2%
Pending Sales			250	<b>247</b>	-1.2%	744	<b>779</b>	4.7%
New Listings			346	<b>408</b>	17.9%	1,041	<b>1,231</b>	18.3%
Median List Price			\$424,950	<b>\$462,450</b>	8.8%	\$439,999	<b>\$450,000</b>	2.3%
Median Sales Price			\$426,500	<b>\$460,000</b>	7.9%	\$441,000	<b>\$449,000</b>	1.8%
Median Price Per Square Foot			\$221	<b>\$216</b>	-2.0%	\$217	<b>\$217</b>	-0.3%
Sold Dollar Volume (in millions)			\$84.0	<b>\$90.0</b>	7.1%	\$291.3	<b>\$313.1</b>	7.5%
Median Sold/Ask Price Ratio			100.0%	<b>100.0%</b>	0.0%	100.0%	<b>100.0%</b>	0.0%
Average Days on Market			31	<b>36</b>	16.5%	40	<b>49</b>	20.8%
Active Listings			394	<b>480</b>	21.8%	n/a	<b>n/a</b>	n/a
Months of Supply			2.1	<b>2.2</b>	7.0%	n/a	<b>n/a</b>	n/a

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

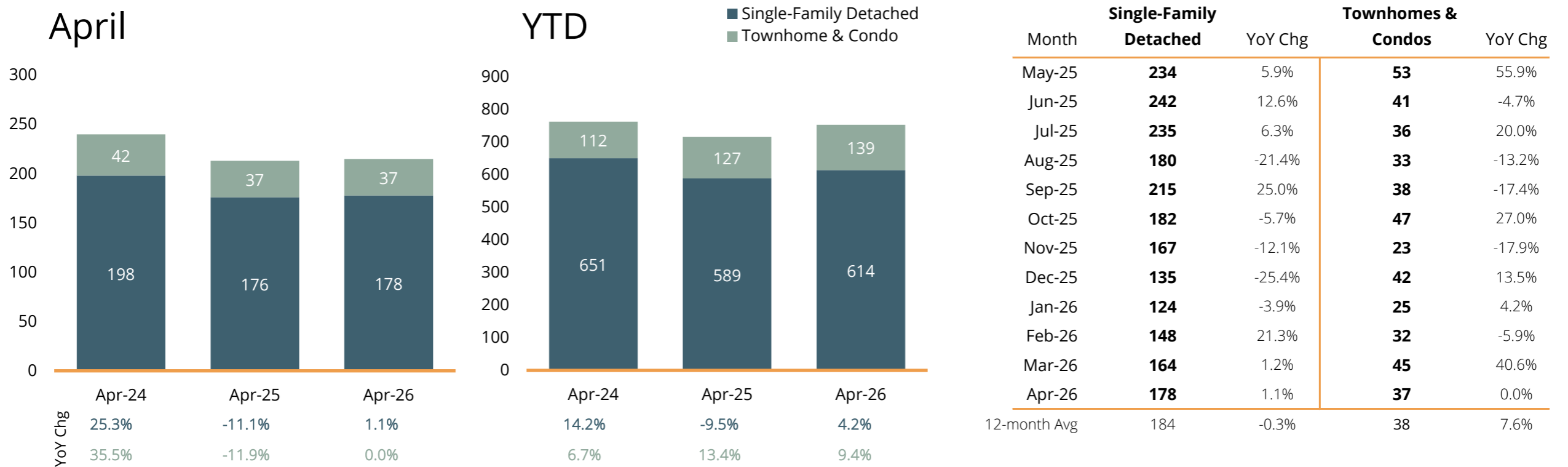
# Townhome & Condo Market Overview



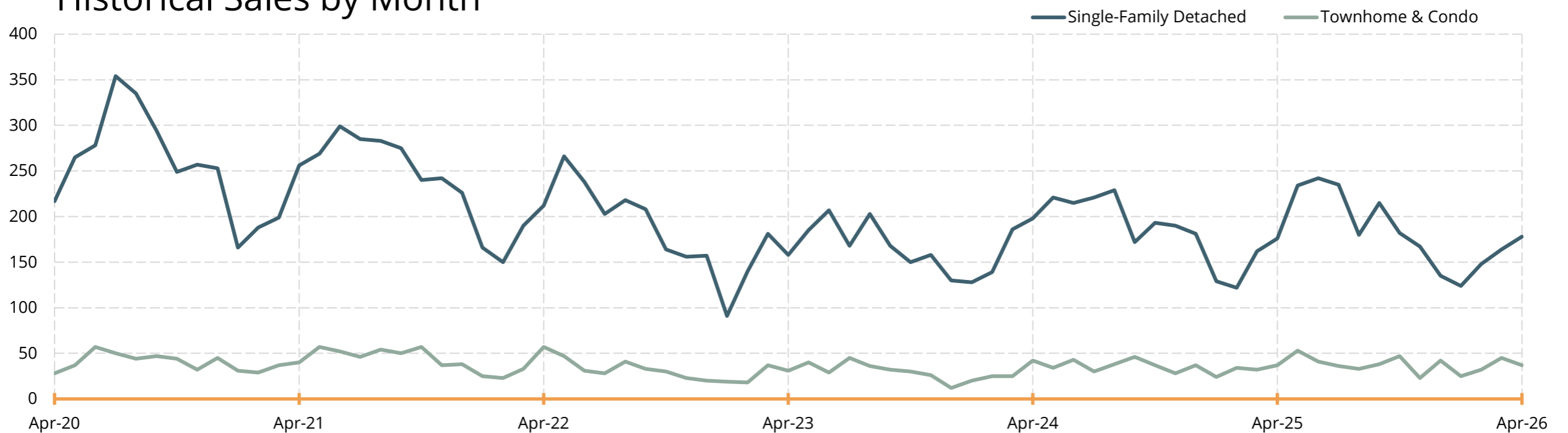
Key Metrics	2-year Trends		Apr-25	Apr-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Apr-24	Apr-26						
Sales			37	<b>37</b>	0.0%	127	<b>139</b>	9.4%
Pending Sales			45	<b>48</b>	6.7%	148	<b>177</b>	19.6%
New Listings			60	<b>78</b>	30.0%	209	<b>253</b>	21.1%
Median List Price			\$340,000	<b>\$374,990</b>	10.3%	\$350,342	<b>\$374,900</b>	7.0%
Median Sales Price			\$330,000	<b>\$374,990</b>	13.6%	\$350,343	<b>\$367,000</b>	4.8%
Median Price Per Square Foot			\$217	<b>\$205</b>	-5.6%	\$204	<b>\$205</b>	0.2%
Sold Dollar Volume (in millions)			\$12.5	<b>\$13.6</b>	8.7%	\$44.1	<b>\$48.9</b>	10.9%
Median Sold/Ask Price Ratio			99.5%	<b>99.4%</b>	-0.1%	100.0%	<b>99.4%</b>	-0.6%
Average Days on Market			30	<b>29</b>	-5.1%	30	<b>48</b>	61.0%
Active Listings			67	<b>81</b>	20.9%	n/a	<b>n/a</b>	n/a
Months of Supply			2.3	<b>2.1</b>	-8.9%	n/a	<b>n/a</b>	n/a

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

# Sales

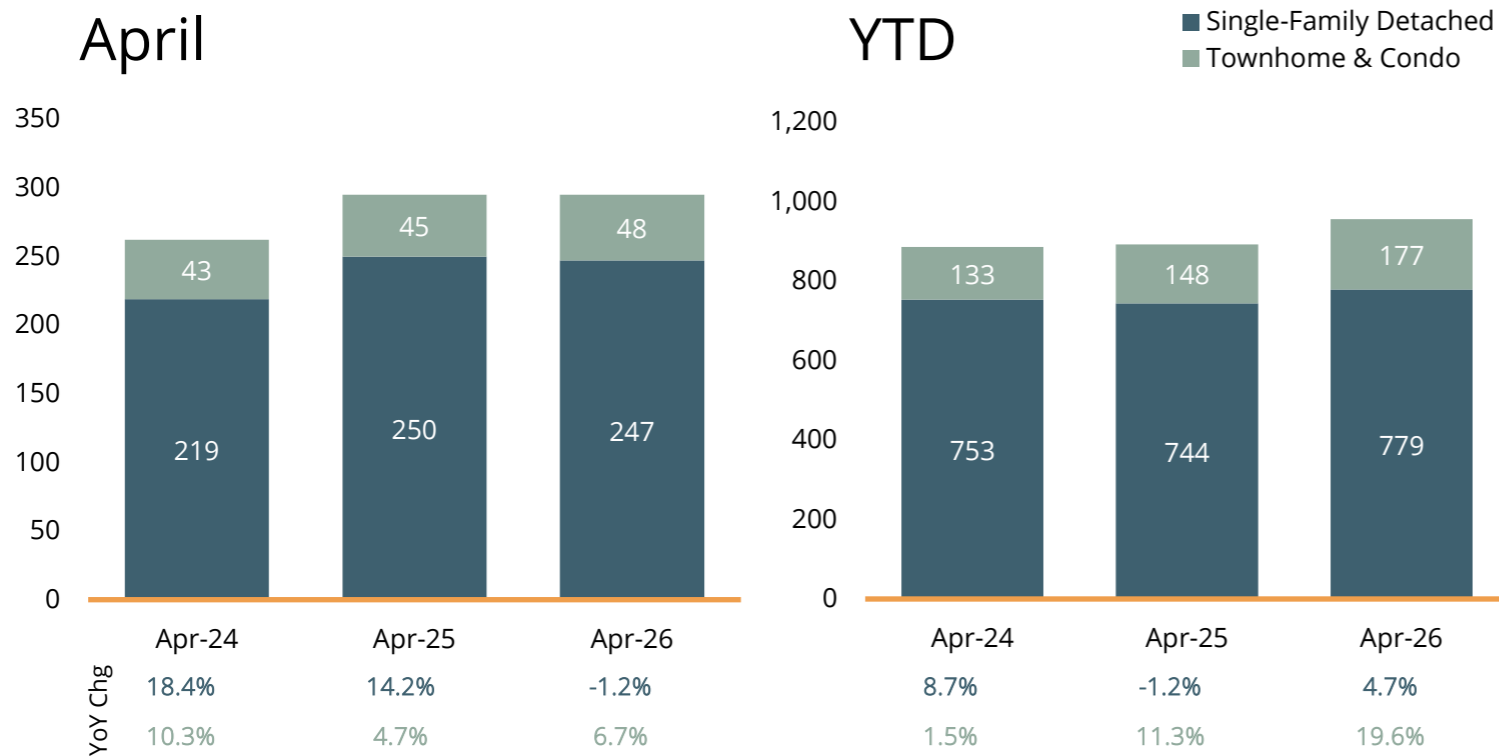


## Historical Sales by Month



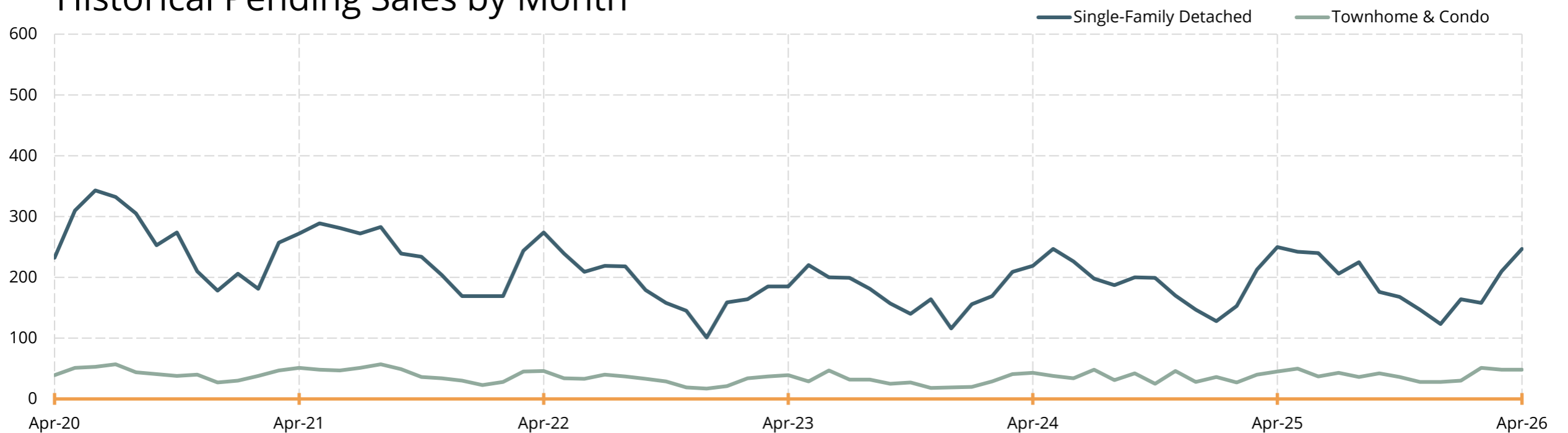
Source: Virginia REALTORS®, data accessed May 15, 2026

# Pending Sales



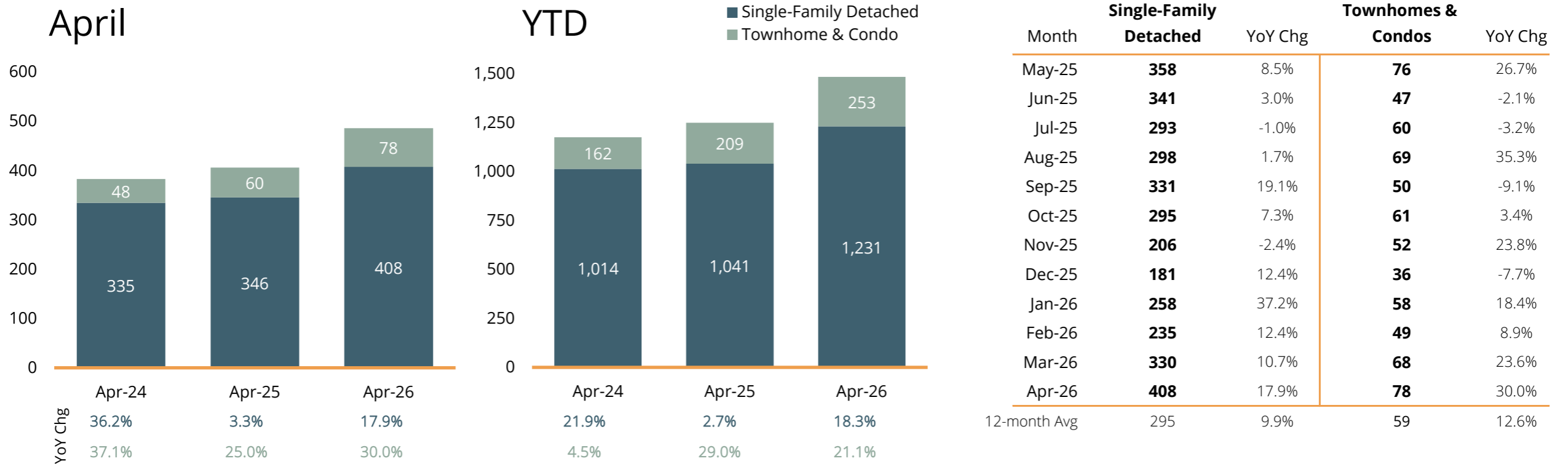
Month	Single-Family Detached	YoY Chg	Townhomes & Condos	YoY Chg
May-25	<b>242</b>	-2.0%	<b>50</b>	31.6%
Jun-25	<b>240</b>	6.2%	<b>37</b>	8.8%
Jul-25	<b>206</b>	4.0%	<b>43</b>	-10.4%
Aug-25	<b>225</b>	20.3%	<b>36</b>	16.1%
Sep-25	<b>176</b>	-12.0%	<b>42</b>	0.0%
Oct-25	<b>168</b>	-15.6%	<b>36</b>	44.0%
Nov-25	<b>147</b>	-13.5%	<b>28</b>	-39.1%
Dec-25	<b>123</b>	-16.3%	<b>28</b>	0.0%
Jan-26	<b>164</b>	28.1%	<b>30</b>	-16.7%
Feb-26	<b>158</b>	3.3%	<b>51</b>	88.9%
Mar-26	<b>210</b>	-1.4%	<b>48</b>	20.0%
Apr-26	<b>247</b>	-1.2%	<b>48</b>	6.7%
12-month Avg	192	-0.5%	40	8.4%

## Historical Pending Sales by Month

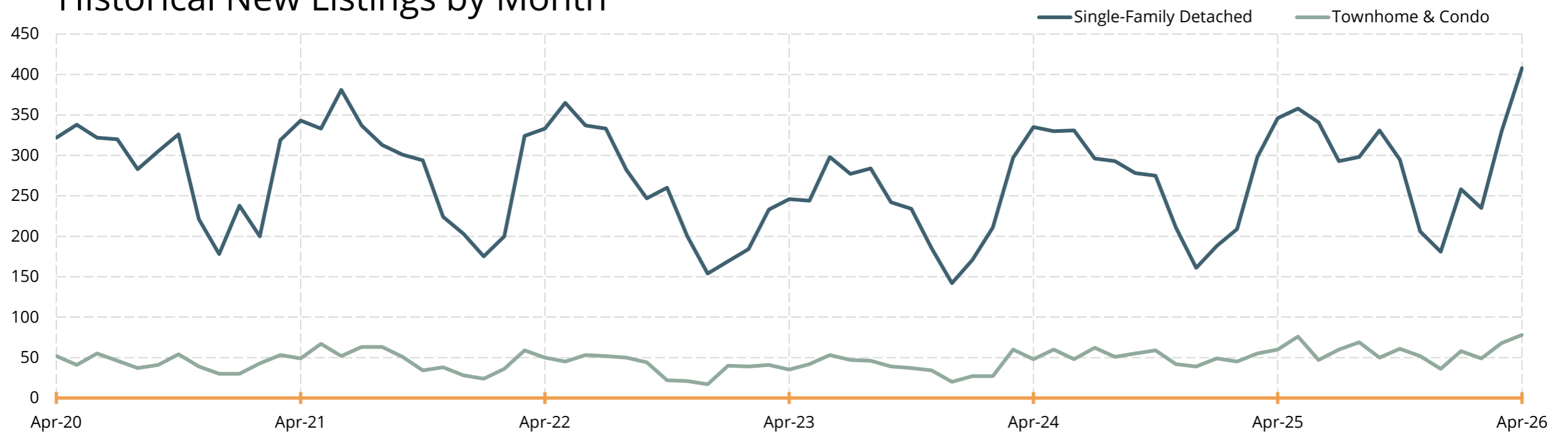


Source: Virginia REALTORS®, data accessed May 15, 2026

# New Listings

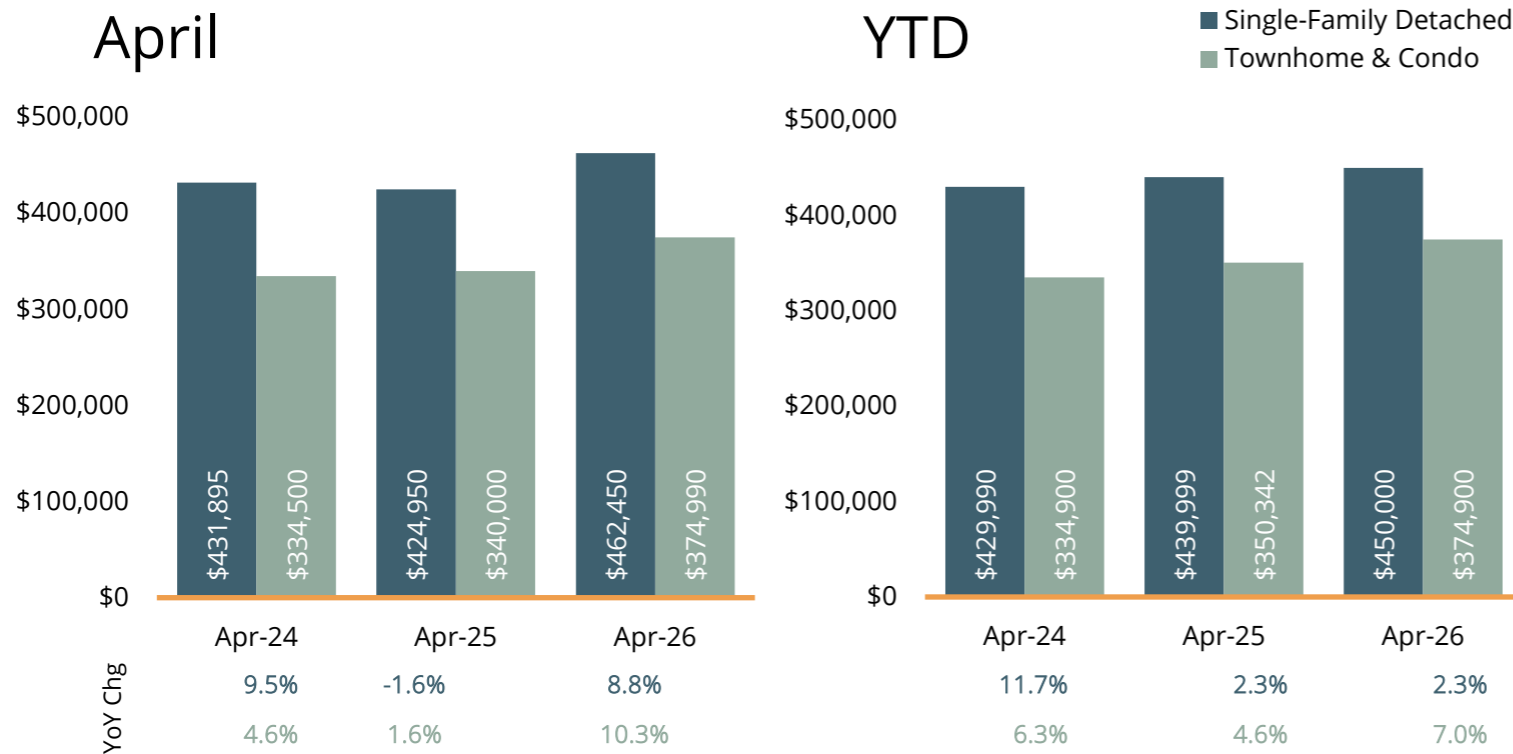


## Historical New Listings by Month



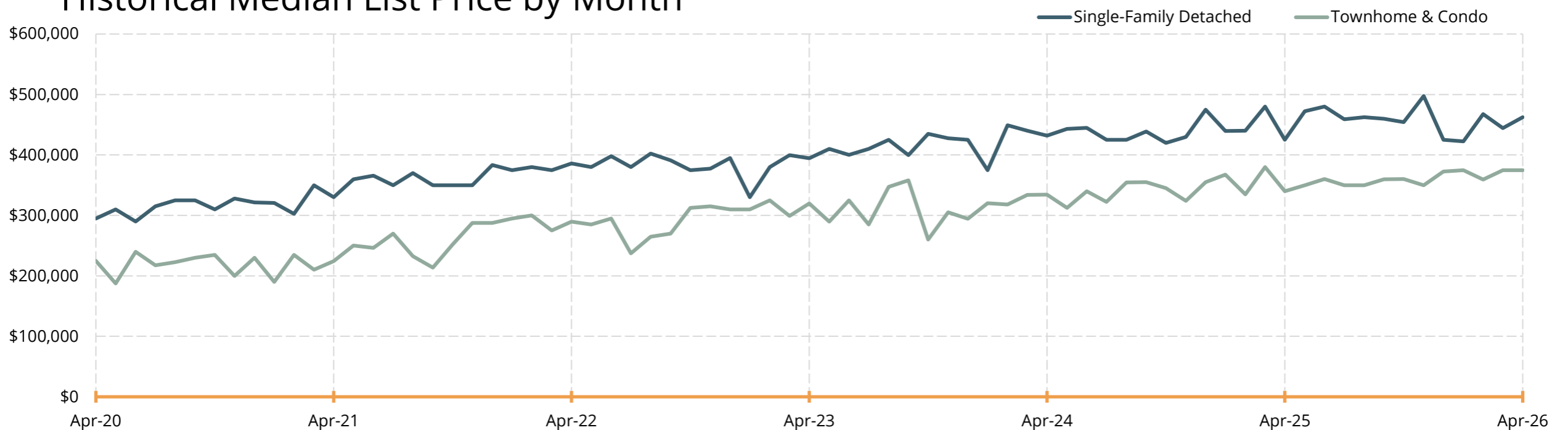
Source: Virginia REALTORS®, data accessed May 15, 2026

# Median List Price



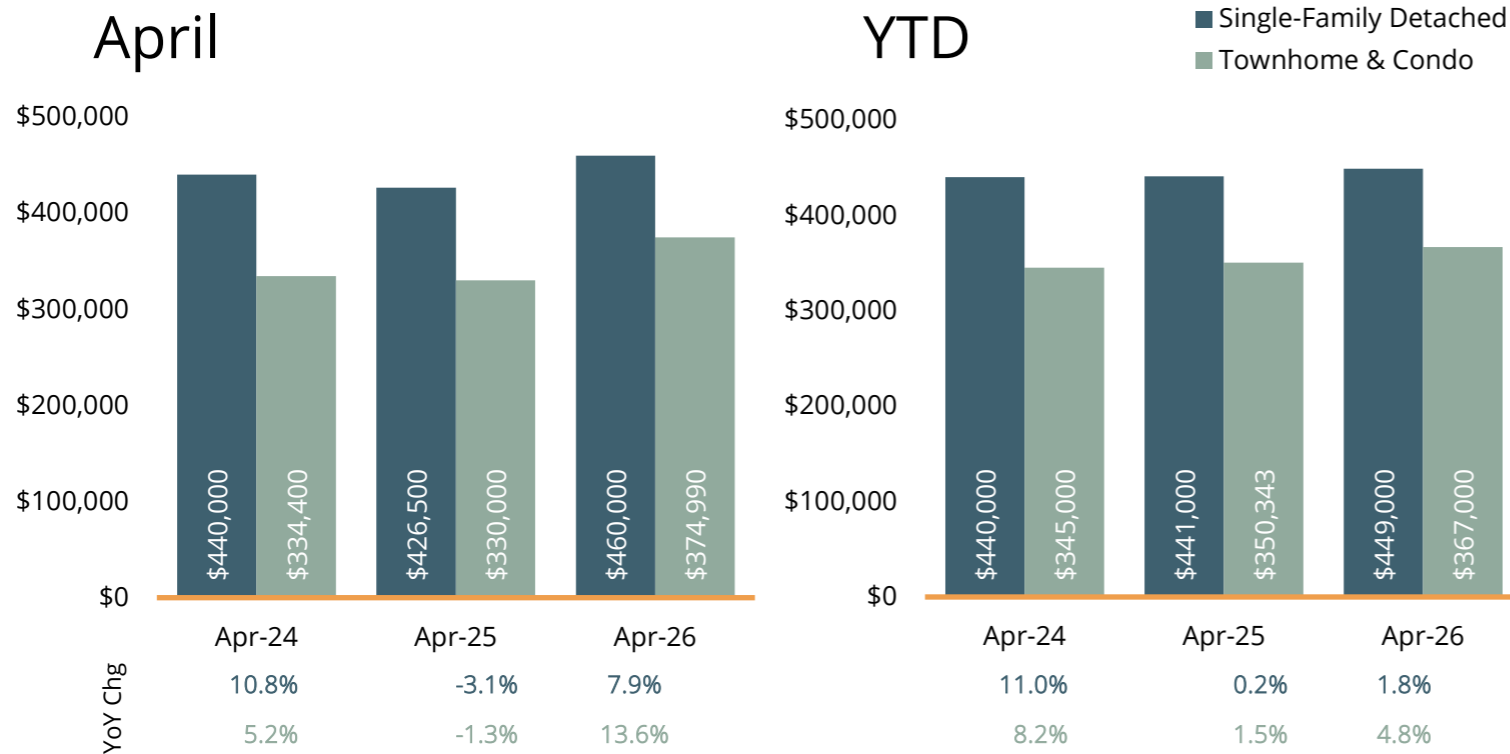
Month	Single-Family Detached	YoY Chg	Townhomes & Condos	YoY Chg
May-25	<b>\$472,495</b>	6.7%	<b>\$349,900</b>	12.0%
Jun-25	<b>\$479,990</b>	7.9%	<b>\$360,000</b>	5.9%
Jul-25	<b>\$459,000</b>	8.0%	<b>\$349,945</b>	8.5%
Aug-25	<b>\$462,495</b>	8.8%	<b>\$350,000</b>	-1.3%
Sep-25	<b>\$460,000</b>	4.8%	<b>\$359,795</b>	1.4%
Oct-25	<b>\$454,500</b>	8.2%	<b>\$360,000</b>	4.4%
Nov-25	<b>\$497,500</b>	15.7%	<b>\$349,990</b>	8.0%
Dec-25	<b>\$425,000</b>	-10.5%	<b>\$372,445</b>	4.9%
Jan-26	<b>\$422,400</b>	-3.9%	<b>\$374,990</b>	2.0%
Feb-26	<b>\$467,450</b>	6.3%	<b>\$359,500</b>	7.3%
Mar-26	<b>\$444,450</b>	-7.4%	<b>\$375,000</b>	-1.3%
Apr-26	<b>\$462,450</b>	8.8%	<b>\$374,990</b>	10.3%
12-month Avg	\$458,977	4.2%	\$361,380	5.0%

## Historical Median List Price by Month



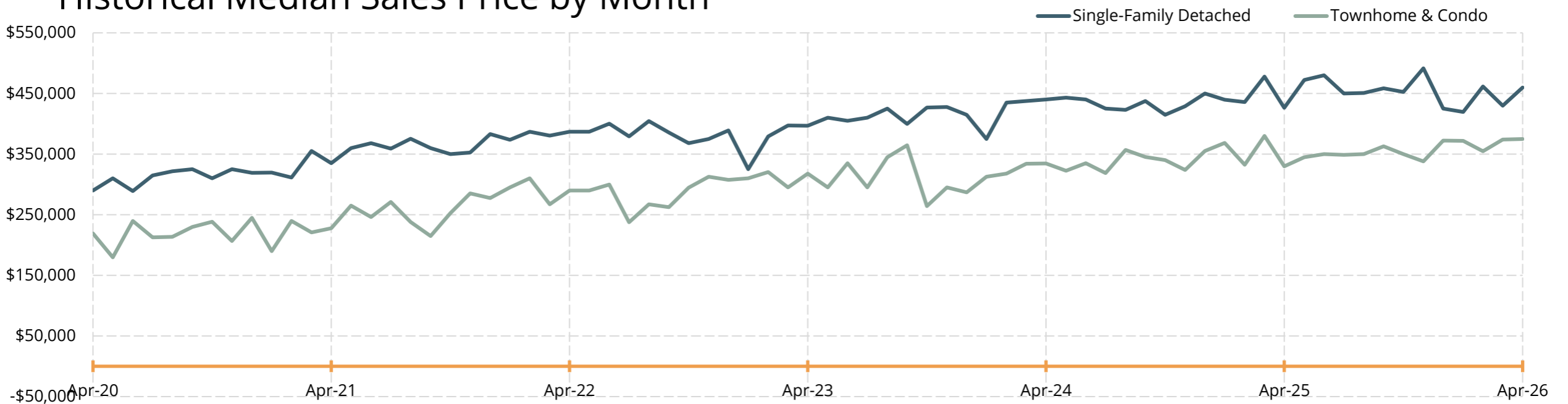
Source: Virginia REALTORS®, data accessed May 15, 2026

# Median Sales Price



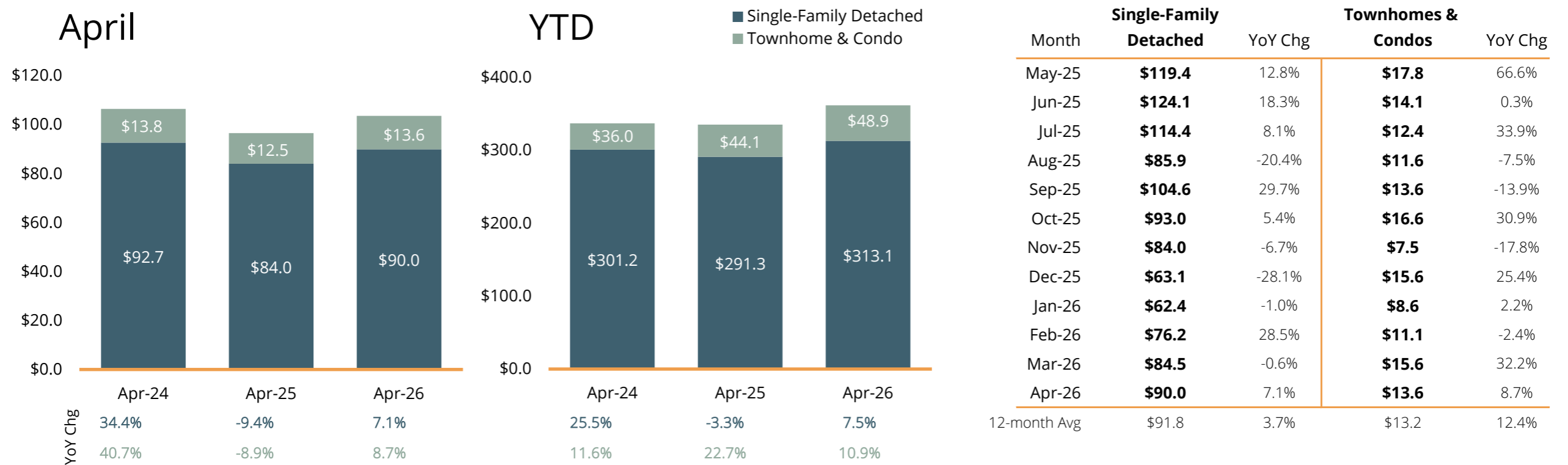
Month	Single-Family Detached	YoY Chg	Townhomes & Condos	YoY Chg
May-25	<b>\$472,495</b>	6.7%	<b>\$345,000</b>	7.0%
Jun-25	<b>\$479,995</b>	9.1%	<b>\$350,000</b>	4.5%
Jul-25	<b>\$450,000</b>	5.9%	<b>\$348,745</b>	9.5%
Aug-25	<b>\$450,768</b>	6.6%	<b>\$350,000</b>	-2.0%
Sep-25	<b>\$458,668</b>	4.8%	<b>\$362,945</b>	5.2%
Oct-25	<b>\$452,450</b>	9.0%	<b>\$350,000</b>	2.9%
Nov-25	<b>\$491,522</b>	14.6%	<b>\$338,000</b>	4.3%
Dec-25	<b>\$425,000</b>	-5.6%	<b>\$372,445</b>	4.9%
Jan-26	<b>\$419,500</b>	-4.6%	<b>\$372,000</b>	1.0%
Feb-26	<b>\$461,500</b>	5.8%	<b>\$354,500</b>	6.6%
Mar-26	<b>\$430,000</b>	-10.0%	<b>\$374,000</b>	-1.6%
Apr-26	<b>\$460,000</b>	7.9%	<b>\$374,990</b>	13.6%
12-month Avg	\$454,325	4.0%	\$357,719	4.5%

## Historical Median Sales Price by Month

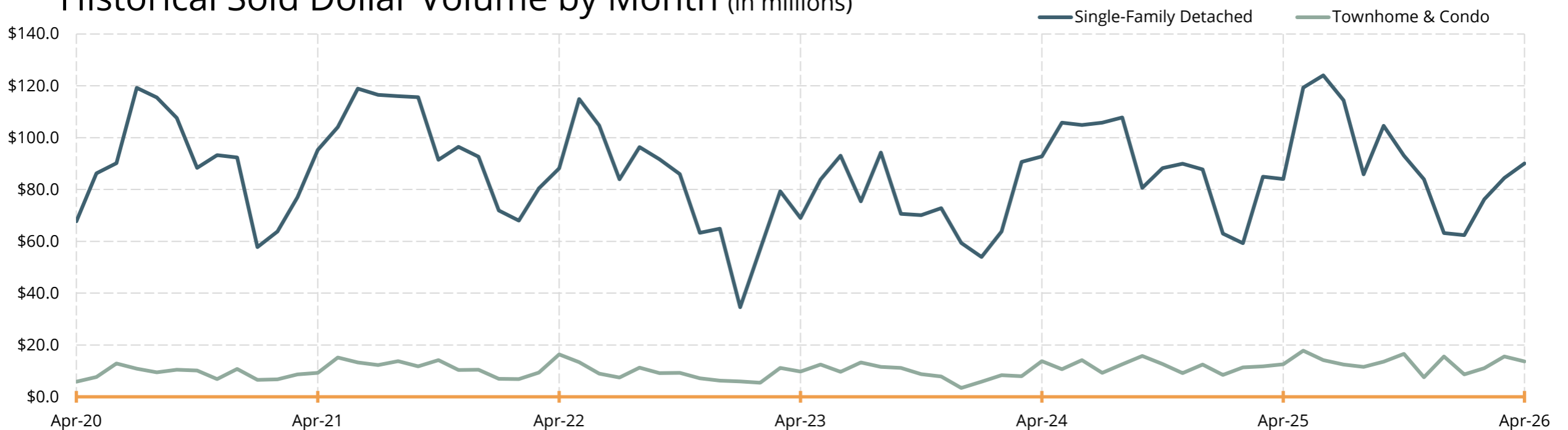


Source: Virginia REALTORS®, data accessed May 15, 2026

# Sold Dollar Volume (in millions)

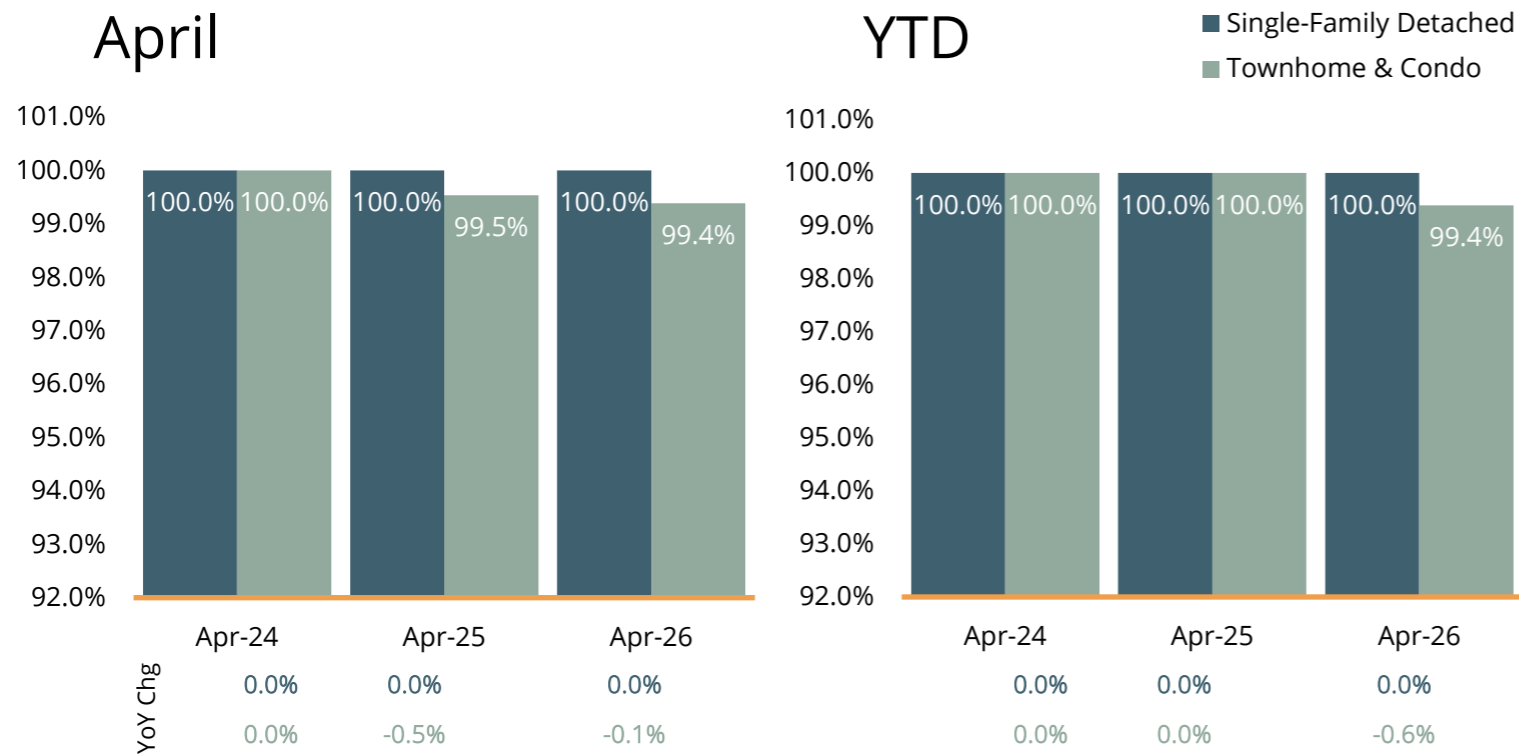


## Historical Sold Dollar Volume by Month (in millions)



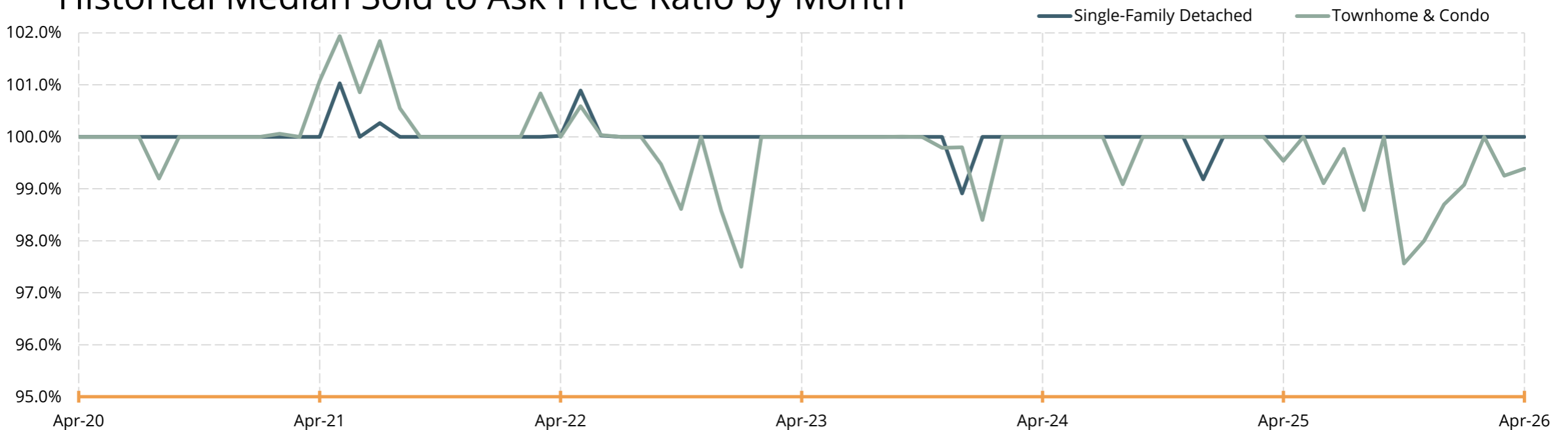
Source: Virginia REALTORS®, data accessed May 15, 2026

# Median Sold to Ask Price Ratio

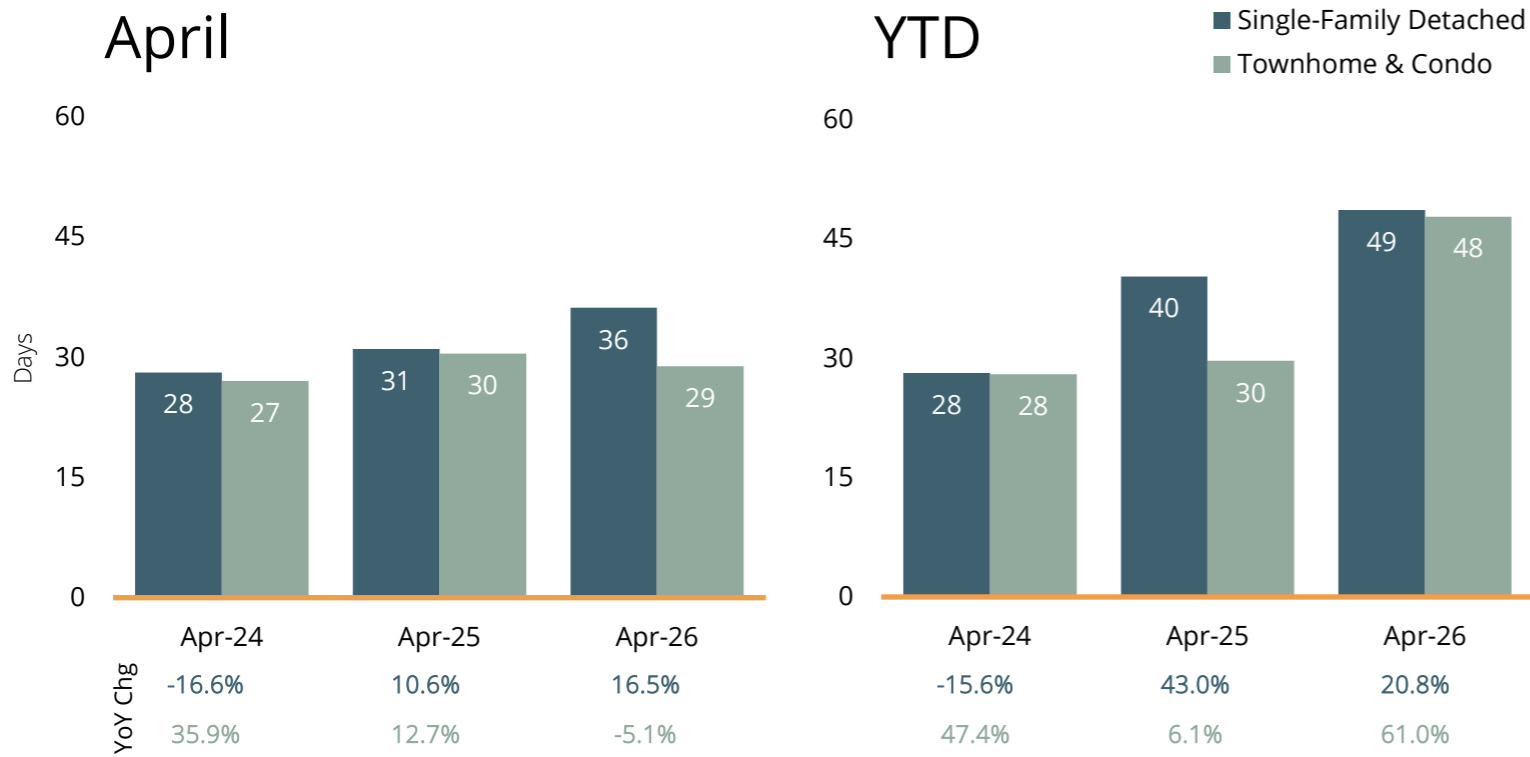


Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
May-25	100.0%	0.0%	100.0%	0.0%
Jun-25	100.0%	0.0%	99.1%	-0.9%
Jul-25	100.0%	0.0%	99.8%	-0.2%
Aug-25	100.0%	0.0%	98.6%	-0.5%
Sep-25	100.0%	0.0%	100.0%	0.0%
Oct-25	100.0%	0.0%	97.6%	-2.4%
Nov-25	100.0%	0.0%	98.0%	-2.0%
Dec-25	100.0%	0.8%	98.7%	-1.3%
Jan-26	100.0%	0.0%	99.1%	-0.9%
Feb-26	100.0%	0.0%	100.0%	0.0%
Mar-26	100.0%	0.0%	99.3%	-0.7%
Apr-26	100.0%	0.0%	99.4%	-0.1%
12-month Avg	100.0%	0.1%	99.1%	-0.8%

## Historical Median Sold to Ask Price Ratio by Month

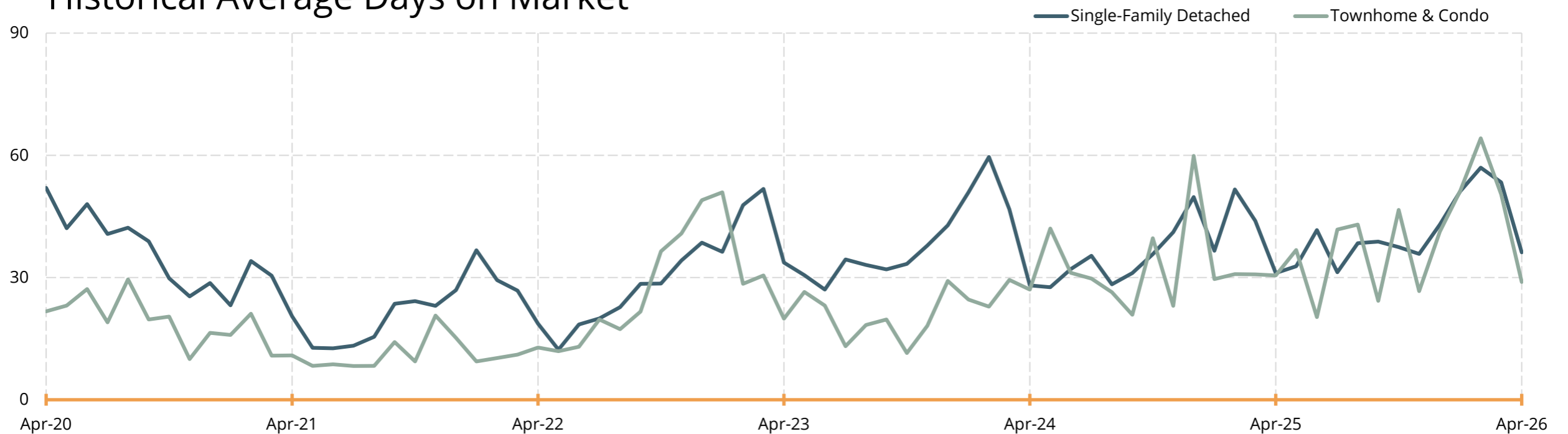


# Average Days on Market



Month	Single-Family Detached	YoY Chg	Townhomes & Condos	YoY Chg
May-25	33	18.4%	37	-12.5%
Jun-25	42	29.7%	20	-34.9%
Jul-25	31	-11.3%	42	40.4%
Aug-25	38	35.8%	43	62.7%
Sep-25	39	24.8%	24	16.1%
Oct-25	37	5.0%	47	17.4%
Nov-25	36	-13.0%	27	15.5%
Dec-25	43	-13.6%	41	-31.1%
Jan-26	51	40.0%	51	73.1%
Feb-26	57	10.4%	64	108.2%
Mar-26	53	21.7%	50	63.8%
Apr-26	36	16.5%	29	-5.1%
12-month Avg	41	11.9%	40	20.5%

## Historical Average Days on Market

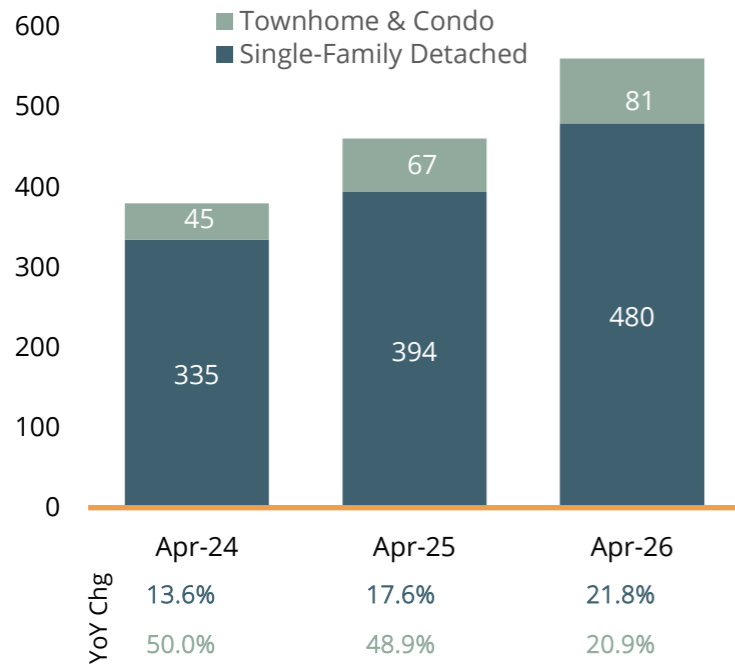


Source: Virginia REALTORS®, data accessed May 15, 2026

# Active Listings

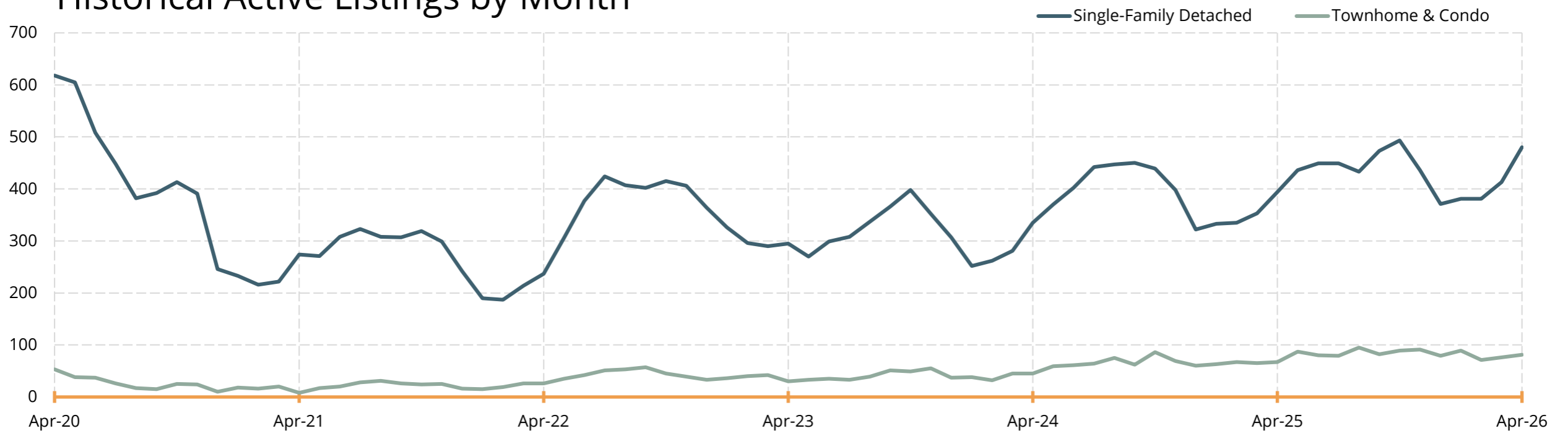


## April



Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
May-25	<b>436</b>	17.8%	<b>87</b>	47.5%
Jun-25	<b>449</b>	11.7%	<b>80</b>	31.1%
Jul-25	<b>449</b>	1.6%	<b>79</b>	23.4%
Aug-25	<b>433</b>	-3.1%	<b>95</b>	26.7%
Sep-25	<b>473</b>	5.1%	<b>82</b>	32.3%
Oct-25	<b>493</b>	12.3%	<b>89</b>	3.5%
Nov-25	<b>436</b>	9.5%	<b>91</b>	31.9%
Dec-25	<b>371</b>	15.2%	<b>79</b>	31.7%
Jan-26	<b>381</b>	14.4%	<b>89</b>	41.3%
Feb-26	<b>381</b>	13.7%	<b>71</b>	6.0%
Mar-26	<b>413</b>	17.0%	<b>76</b>	16.9%
Apr-26	<b>480</b>	21.8%	<b>81</b>	20.9%
12-month Avg	433	10.9%	83	25.2%

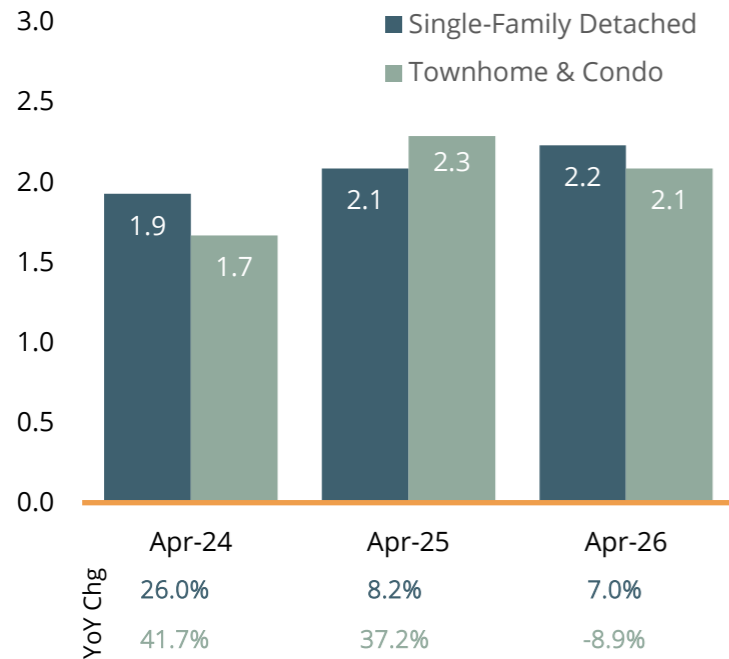
## Historical Active Listings by Month



# Months of Supply

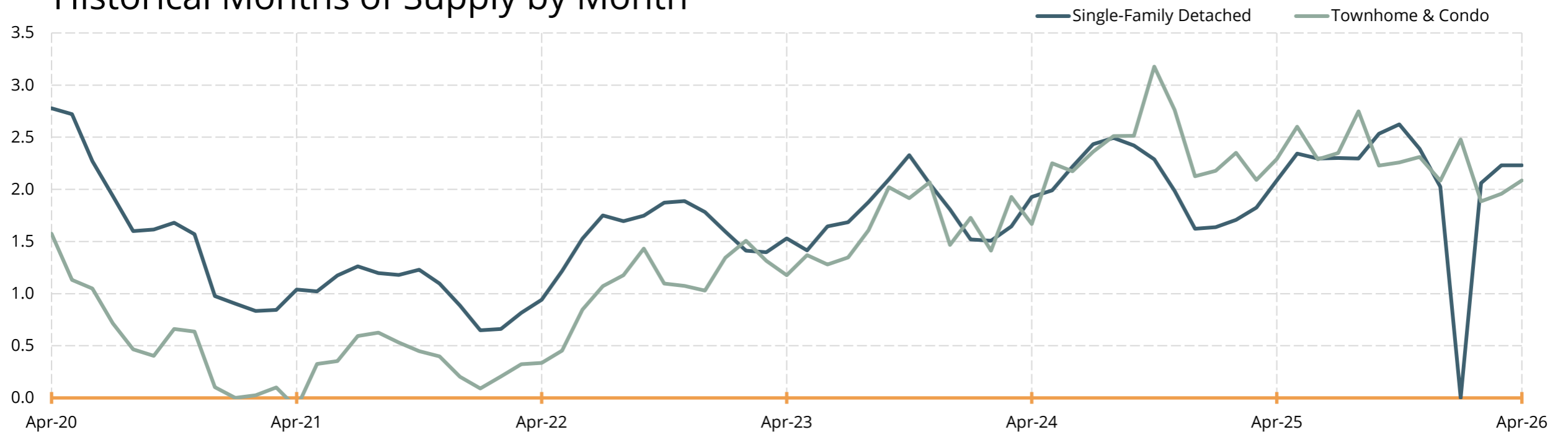


## April



Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
May-25	<b>2.3</b>	17.8%	<b>2.6</b>	15.6%
Jun-25	<b>2.3</b>	3.5%	<b>2.3</b>	5.3%
Jul-25	<b>2.3</b>	-5.4%	<b>2.3</b>	-0.5%
Aug-25	<b>2.3</b>	-7.9%	<b>2.7</b>	9.5%
Sep-25	<b>2.5</b>	4.7%	<b>2.2</b>	-11.3%
Oct-25	<b>2.6</b>	14.6%	<b>2.3</b>	-28.9%
Nov-25	<b>2.4</b>	20.3%	<b>2.3</b>	-16.4%
Dec-25	<b>2.0</b>	24.8%	<b>2.1</b>	-1.9%
Jan-26	<b>0.0</b>	-100.0%	<b>2.5</b>	13.8%
Feb-26	<b>2.1</b>	20.7%	<b>1.9</b>	-19.8%
Mar-26	<b>2.2</b>	22.2%	<b>2.0</b>	-6.4%
Apr-26	<b>2.2</b>	7.0%	<b>2.1</b>	-8.9%
12-month Avg	2.1	2.5%	2.3	-5.2%

## Historical Months of Supply by Month



# Area Overview - Total Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Clarke County	26	<b>44</b>	69.2%	14	<b>23</b>	64.3%	\$655,000	<b>\$525,000</b>	-19.8%	25	<b>36</b>	44.0%	1.9	<b>2.3</b>	23.0%
Frederick County	235	<b>274</b>	16.6%	125	<b>116</b>	-7.2%	\$429,990	<b>\$434,500</b>	1.0%	285	<b>333</b>	16.8%	2.2	<b>2.6</b>	17.3%
Warren County	94	<b>111</b>	18.1%	43	<b>49</b>	14.0%	\$355,000	<b>\$430,000</b>	21.1%	111	<b>128</b>	15.3%	2.2	<b>2.5</b>	13.8%
Winchester	51	<b>57</b>	11.8%	31	<b>27</b>	-12.9%	\$391,297	<b>\$399,990</b>	2.2%	40	<b>64</b>	60.0%	1.4	<b>2.3</b>	64.3%

# Area Overview - Total Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Clarke County	95	<b>117</b>	23.2%	36	<b>60</b>	66.7%	\$652,500	<b>\$608,750</b>	-6.7%	25	<b>36</b>	44.0%
Frederick County	856	<b>874</b>	2.1%	433	<b>423</b>	-2.3%	\$430,000	<b>\$420,000</b>	-2.3%	285	<b>333</b>	16.8%
Warren County	329	<b>389</b>	18.2%	150	<b>171</b>	14.0%	\$377,500	<b>\$400,000</b>	6.0%	111	<b>128</b>	15.3%
Winchester	167	<b>186</b>	11.4%	97	<b>99</b>	2.1%	\$392,853	<b>\$379,990</b>	-3.3%	40	<b>64</b>	60.0%

# Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Clarke County	26	<b>43</b>	65.4%	14	<b>23</b>	64.3%	\$655,000	<b>\$525,000</b>	-19.8%	25	<b>35</b>	40.0%	2.0	<b>2.1</b>	6.7%
Frederick County	188	<b>208</b>	10.6%	104	<b>85</b>	-18.3%	\$461,500	<b>\$479,000</b>	3.8%	238	<b>269</b>	13.0%	2.3	<b>2.3</b>	-0.5%
Warren County	88	<b>107</b>	21.6%	35	<b>48</b>	37.1%	\$373,500	<b>\$430,000</b>	15.1%	101	<b>126</b>	24.8%	2.2	<b>2.6</b>	21.1%
Winchester	44	<b>50</b>	13.6%	23	<b>22</b>	-4.3%	\$390,000	<b>\$407,500</b>	4.5%	30	<b>50</b>	66.7%	1.3	<b>1.3</b>	2.2%

# Area Overview - Single Family Detached Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Clarke County	71	<b>106</b>	49.3%	36	<b>60</b>	66.7%	\$652,500	<b>\$608,750</b>	-6.7%	25	<b>35</b>	40.0%
Frederick County	607	<b>636</b>	4.8%	336	<b>322</b>	-4.2%	\$470,000	<b>\$473,500</b>	0.7%	238	<b>269</b>	13.0%
Warren County	245	<b>344</b>	40.4%	140	<b>157</b>	12.1%	\$388,875	<b>\$420,000</b>	8.0%	101	<b>126</b>	24.8%
Winchester	118	<b>145</b>	22.9%	77	<b>75</b>	-2.6%	\$393,000	<b>\$382,500</b>	-2.7%	30	<b>50</b>	66.7%

# Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Median Sales Price			Active Listings			Months Supply		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Clarke County	0	<b>1</b>	n/a	0	<b>0</b>	n/a	\$0	<b>\$0</b>	n/a	0	<b>1</b>	n/a	0.0	<b>3.0</b>	n/a
Frederick County	47	<b>66</b>	40.4%	21	<b>31</b>	47.6%	\$335,000	<b>\$374,990</b>	11.9%	47	<b>64</b>	36.2%	1.7	<b>2.2</b>	26.1%
Warren County	6	<b>4</b>	-33.3%	8	<b>1</b>	-87.5%	\$263,000	<b>\$278,000</b>	n/a	10	<b>2</b>	-80.0%	3.2	<b>0.5</b>	-84.5%
Winchester	7	<b>7</b>	0.0%	8	<b>5</b>	-37.5%	\$392,075	<b>\$395,000</b>	0.7%	10	<b>14</b>	40.0%	1.8	<b>2.7</b>	46.7%

# Area Overview - Townhome & Condo Market YTD



Geography	New Listings YTD			Sales YTD			Median Sales Price YTD			Active Listings YTD		
	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg	Apr-25	Apr-26	% chg
Clarke County	0	<b>2</b>	n/a	0	<b>0</b>	n/a	\$0	<b>\$0</b>	n/a	0	<b>1</b>	n/a
Frederick County	163	<b>199</b>	22.1%	97	<b>101</b>	4.1%	\$349,000	<b>\$362,000</b>	3.7%	47	<b>64</b>	36.2%
Warren County	29	<b>19</b>	-34.5%	10	<b>14</b>	40.0%	\$263,000	<b>\$362,450</b>	37.8%	10	<b>2</b>	-80.0%
Winchester	17	<b>33</b>	94.1%	20	<b>24</b>	20.0%	\$392,527	<b>\$371,990</b>	-5.2%	10	<b>14</b>	40.0%



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

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