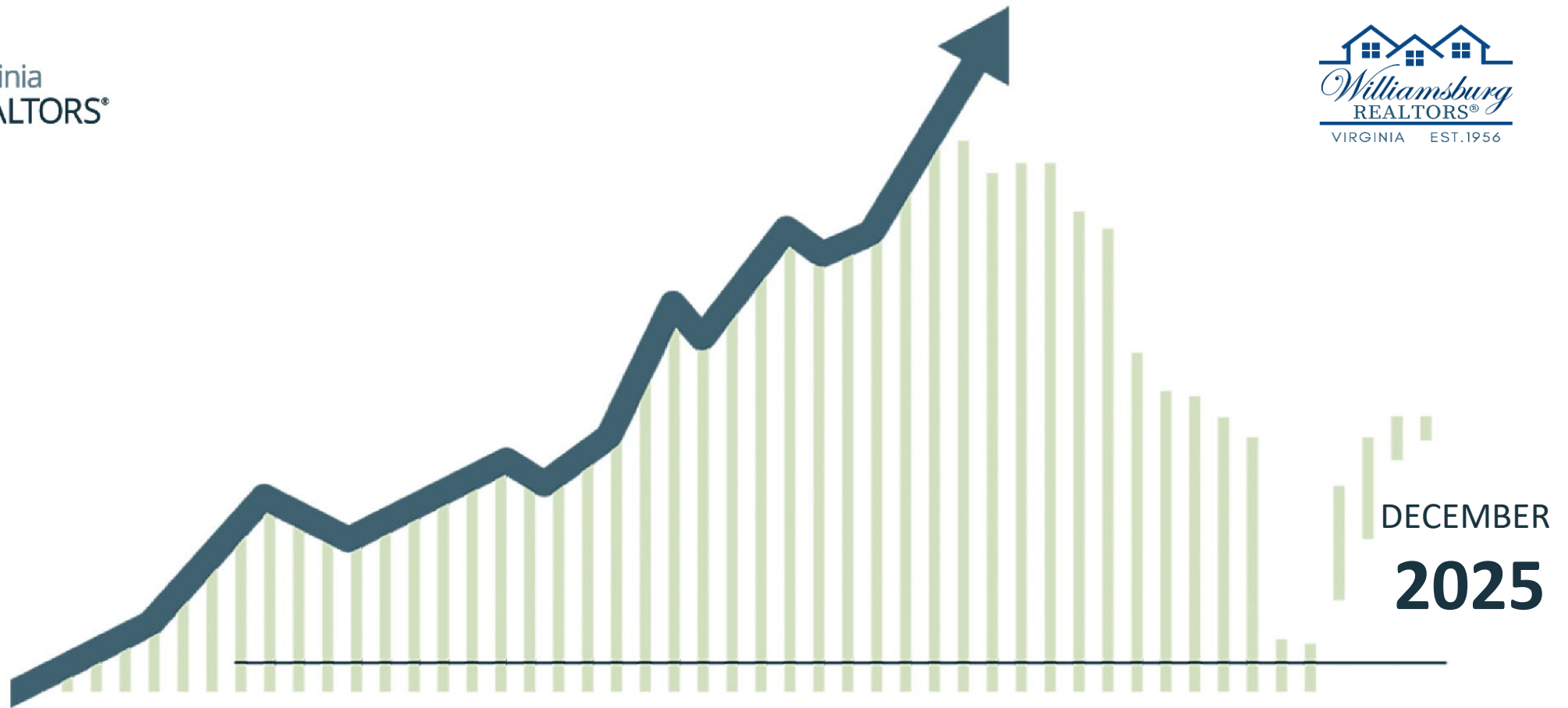




WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

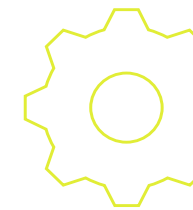
CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

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.

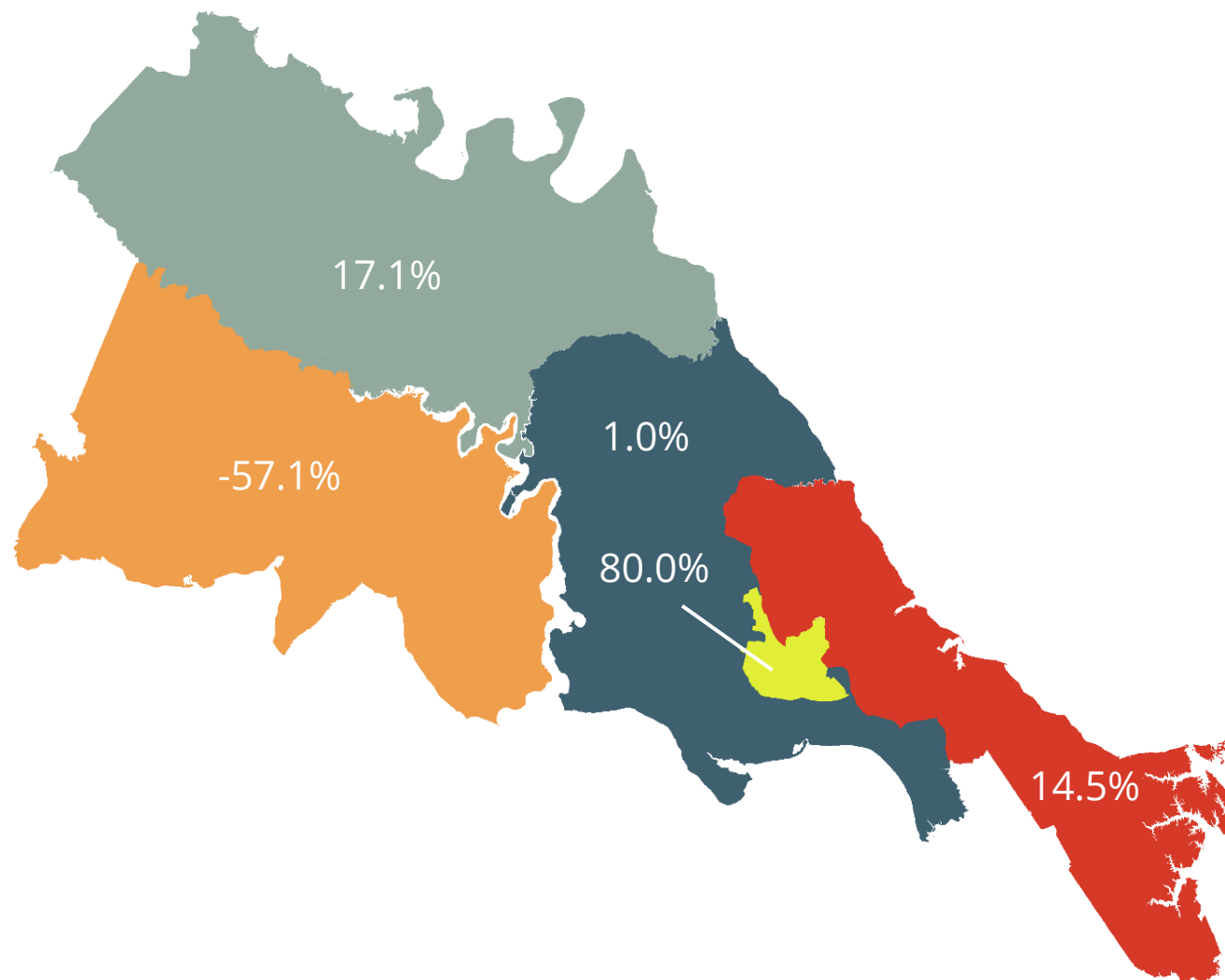
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



<i>Jurisdiction</i>	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%
WAAR	243	270	11.1%

Total Market Overview



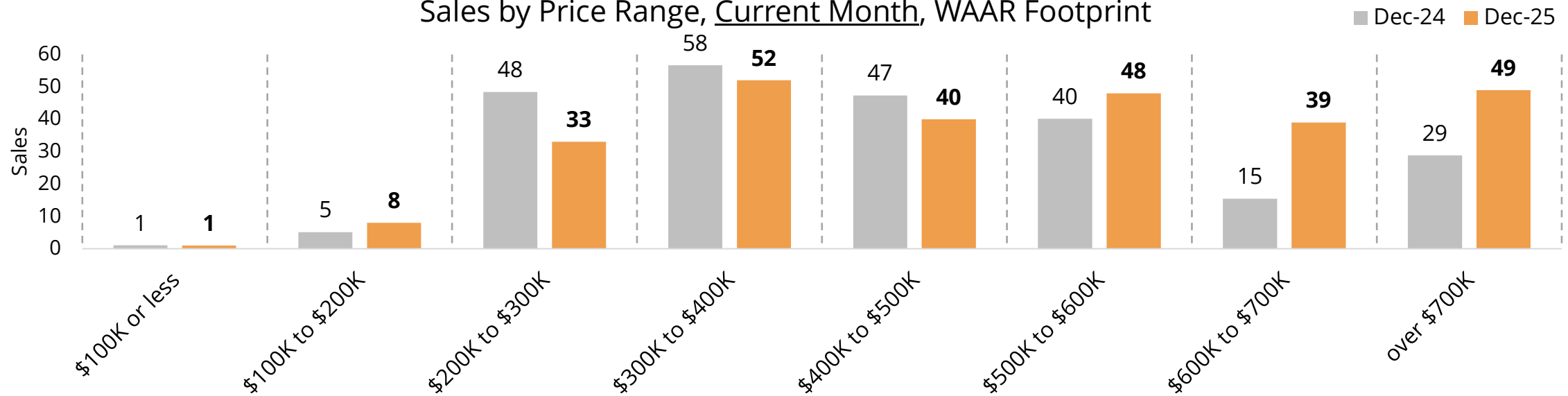
Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23		Dec-25						
Sales				243	270	11.1%	3,215	3,225	0.3%
Pending Sales				155	191	23.2%	2,802	2,911	3.9%
New Listings				195	202	3.6%	3,741	4,507	20.5%
Average List Price				\$479,106	\$530,816	10.8%	\$479,858	\$511,912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

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

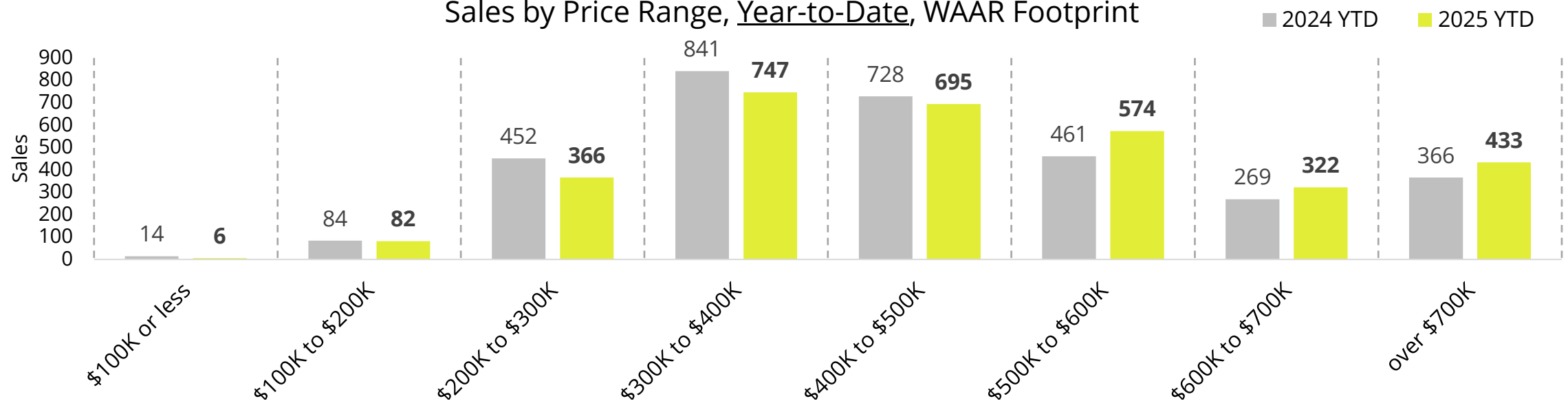
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Single-Family Detached Market Overview



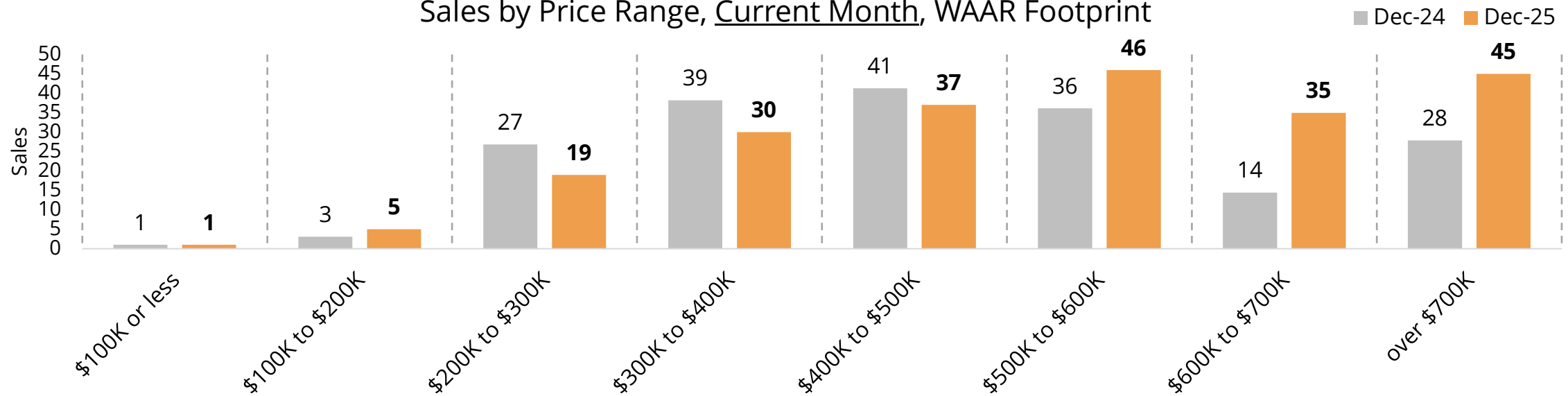
Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23		Dec-25						
Sales				189	218	15.3%	2,593	2,613	0.8%
Pending Sales				133	153	15.0%	2,370	2,438	2.9%
New Listings				166	171	3.0%	3,107	3,717	19.6%
Average List Price				\$517,213	\$564,305	9.1%	\$511,777	\$545,176	6.5%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

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

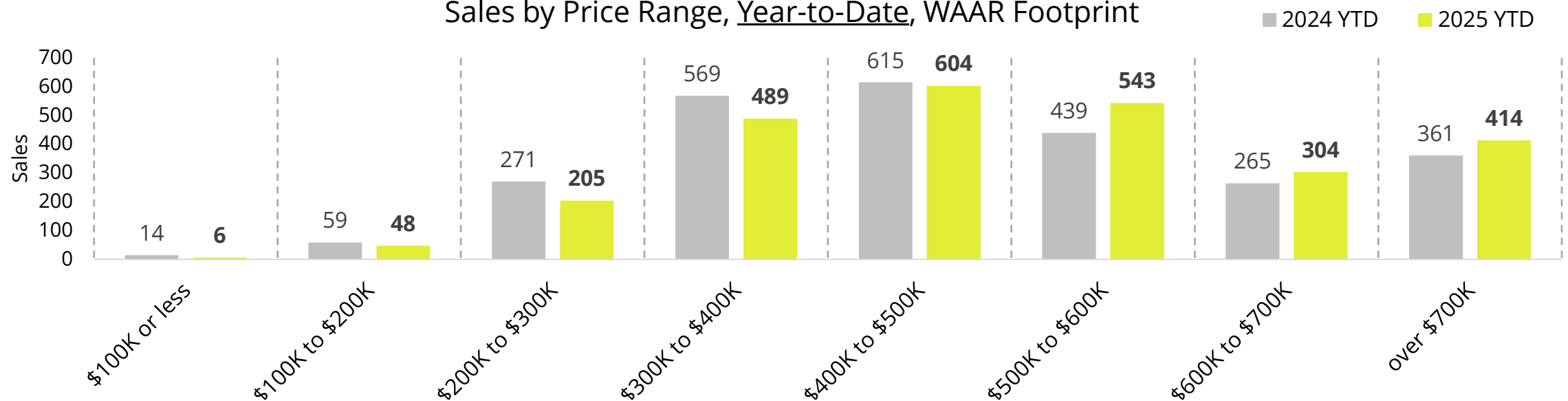
Single-Family Detached Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Townhome & Condo Market Overview



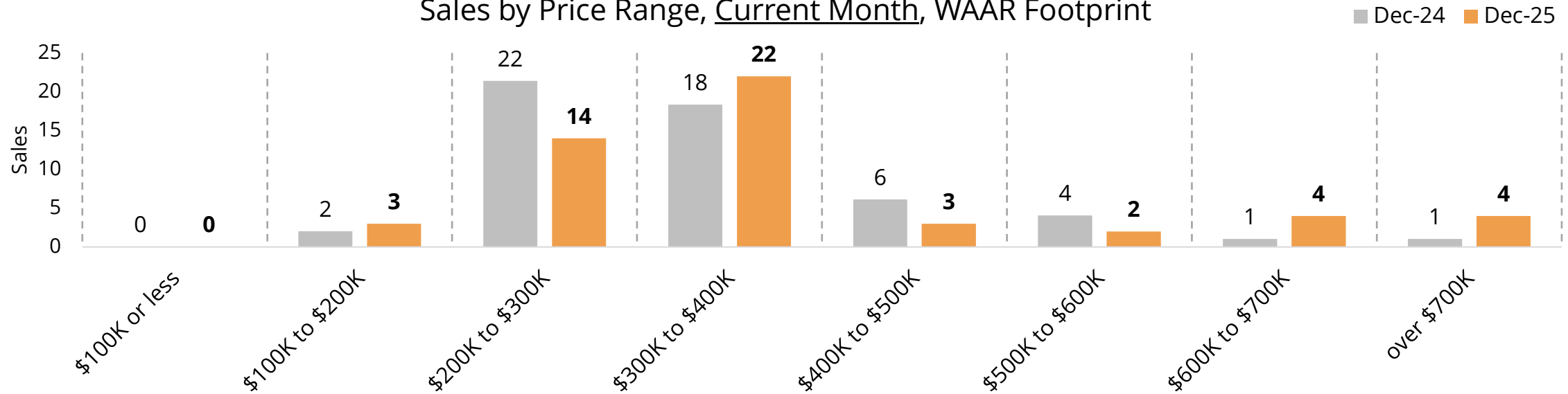
Key Metrics	2-year Trends			Dec-24	Dec-25	YoY Chg	2024 YTD	2025 YTD	YoY Chg
	Dec-23		Dec-25						
Sales				54	52	-3.7%	622	612	-1.6%
Pending Sales				22	38	72.7%	432	473	9.5%
New Listings				29	31	6.9%	634	790	24.6%
Average List Price				\$345,729	\$390,420	12.9%	\$347,109	\$367,435	5.9%
Average Sales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

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

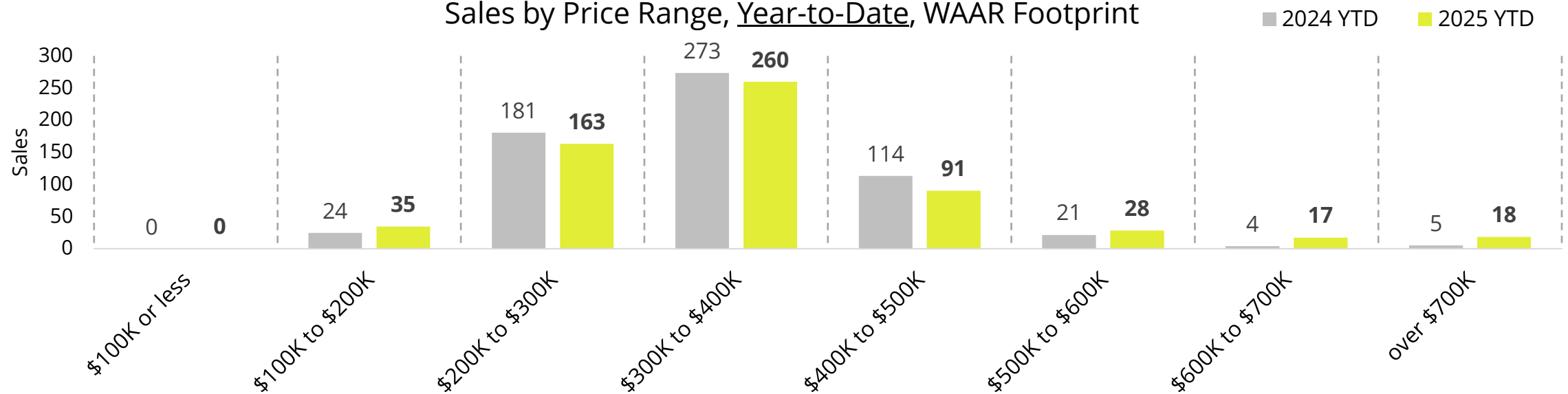
Townhome & Condo Market by Price Range



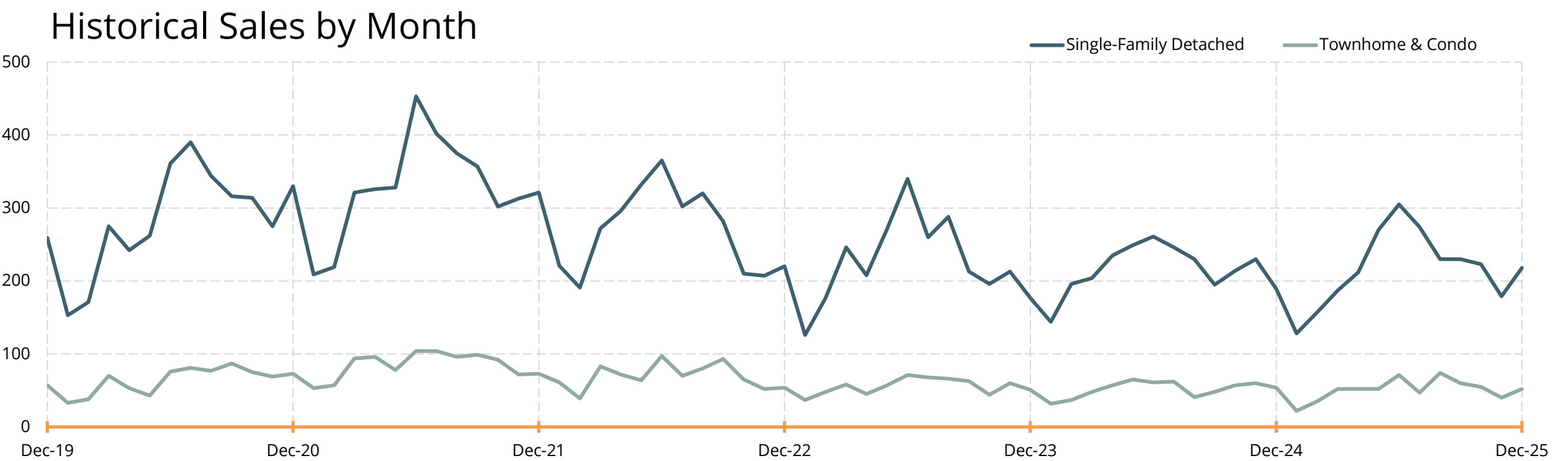
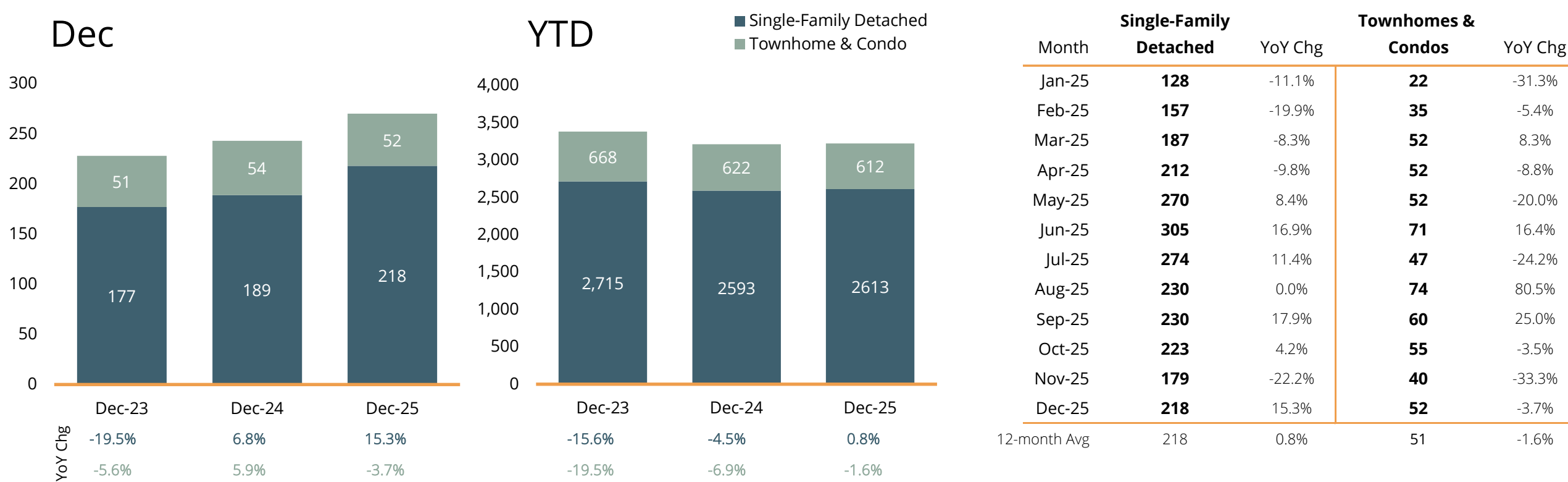
Sales by Price Range, Current Month, WAAR Footprint



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

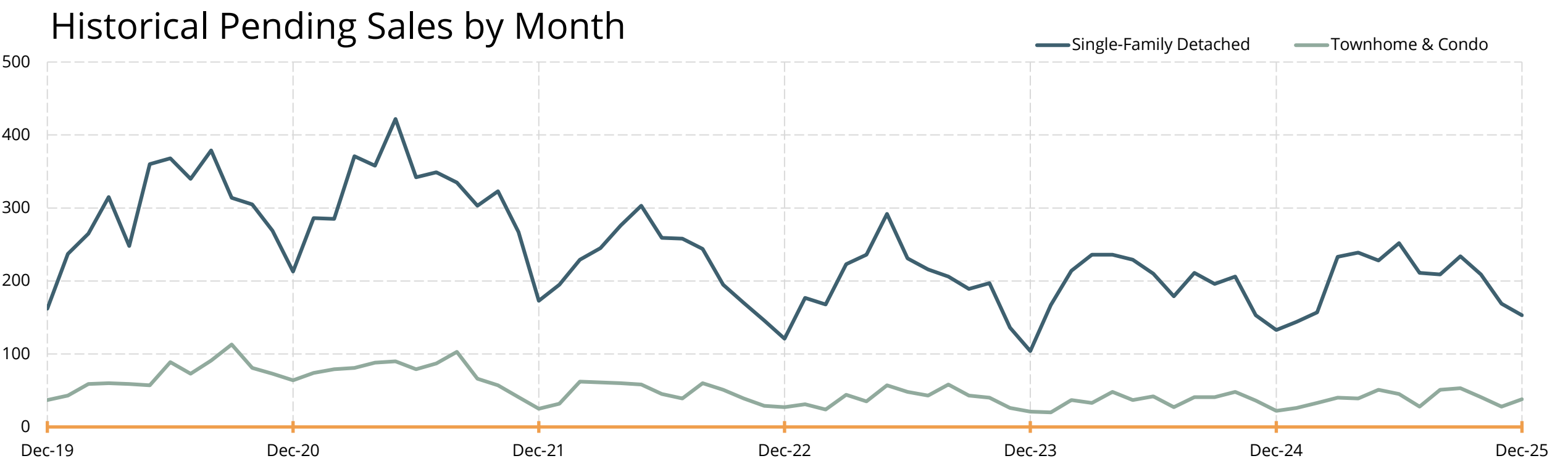
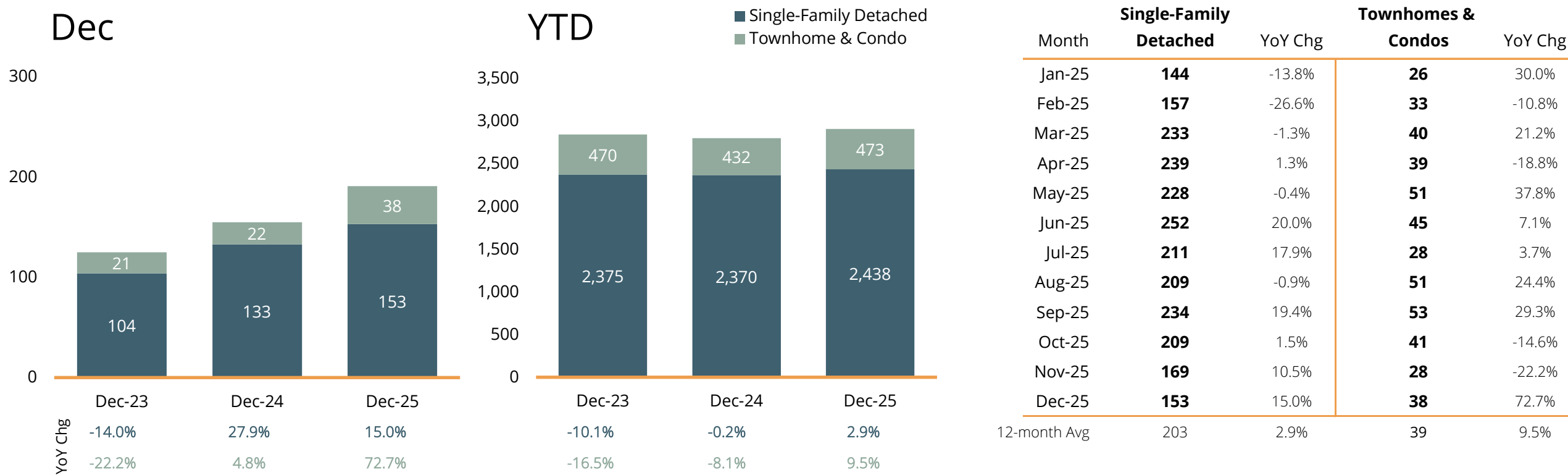


Sales

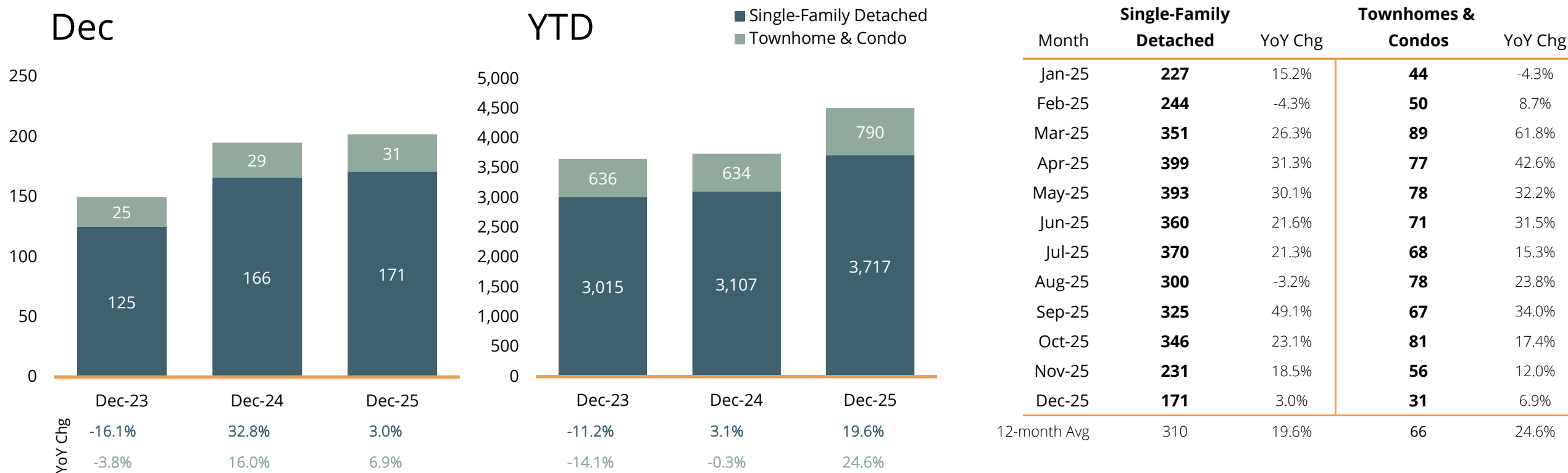


Source: Virginia REALTORS®, data accessed January 15, 2026

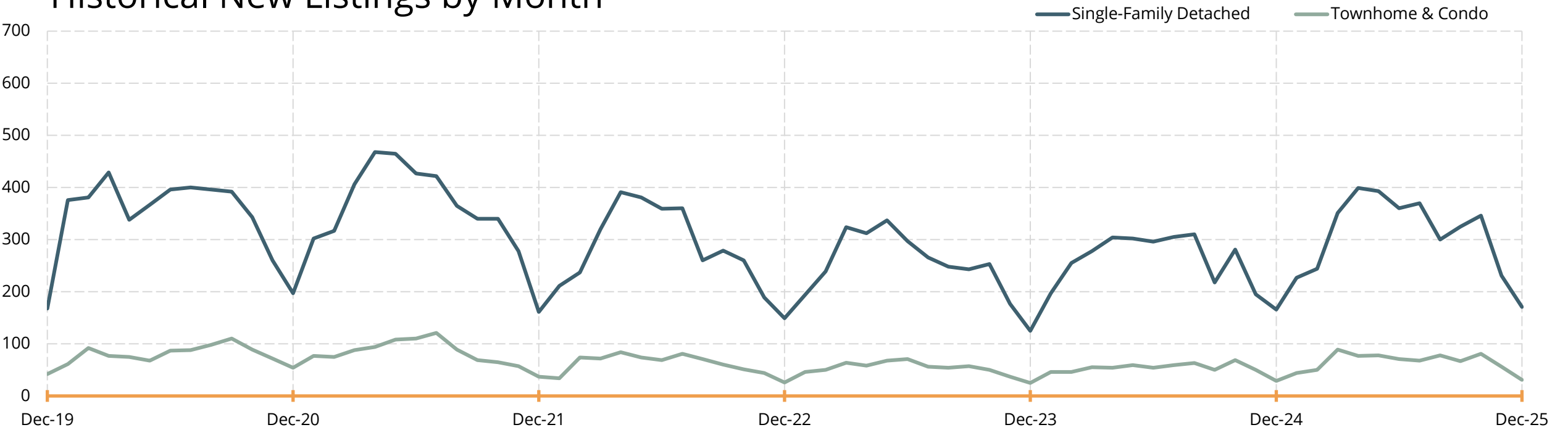
Pending Sales



New Listings

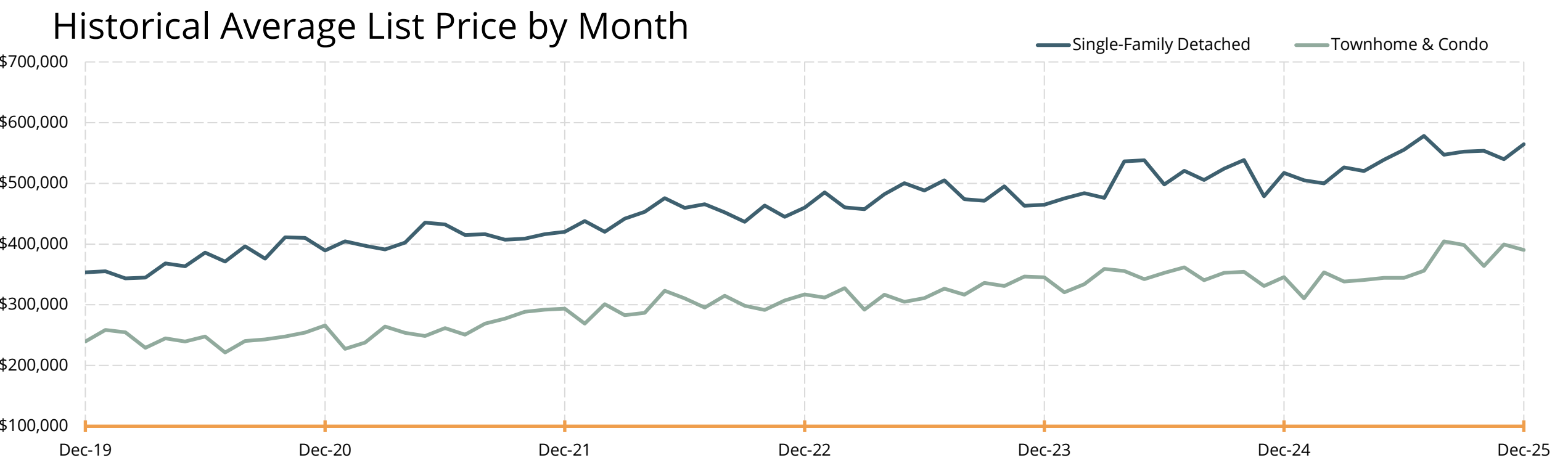
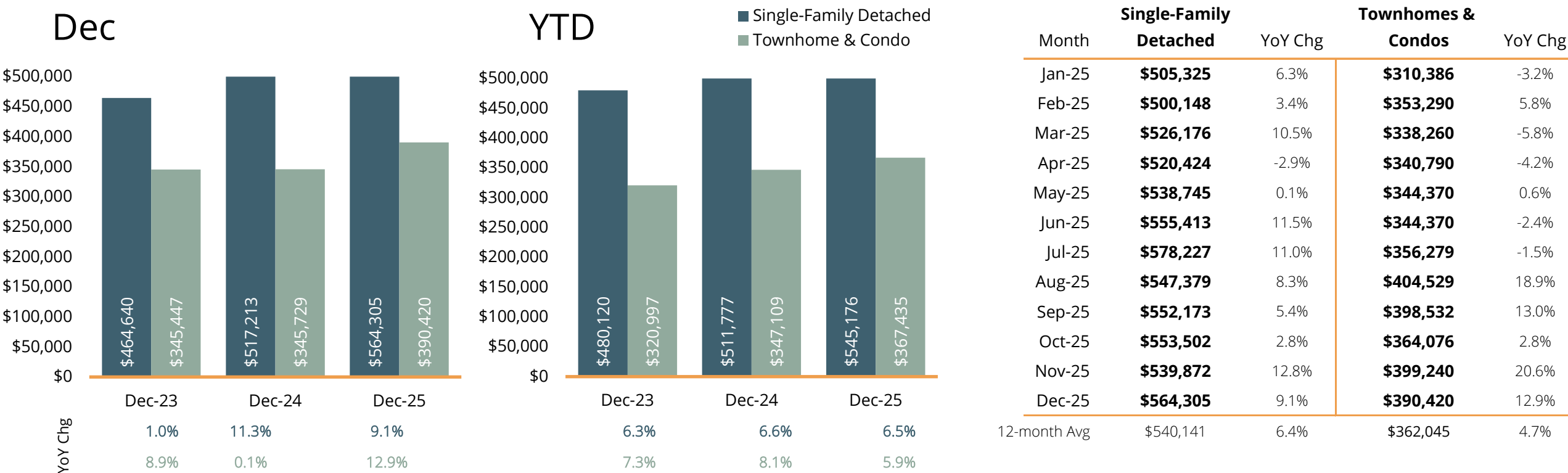


Historical New Listings by Month

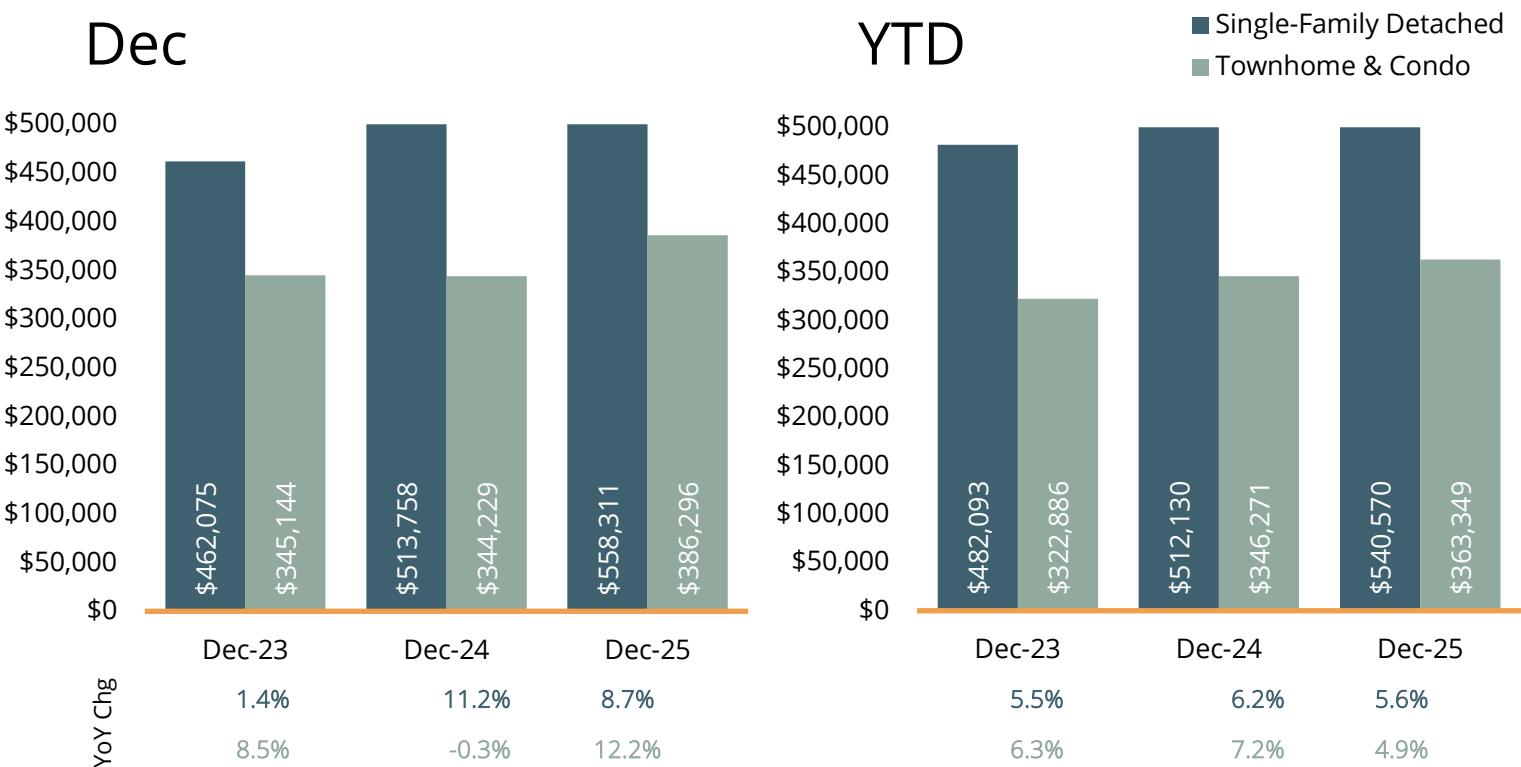


Source: Virginia REALTORS®, data accessed January 15, 2026

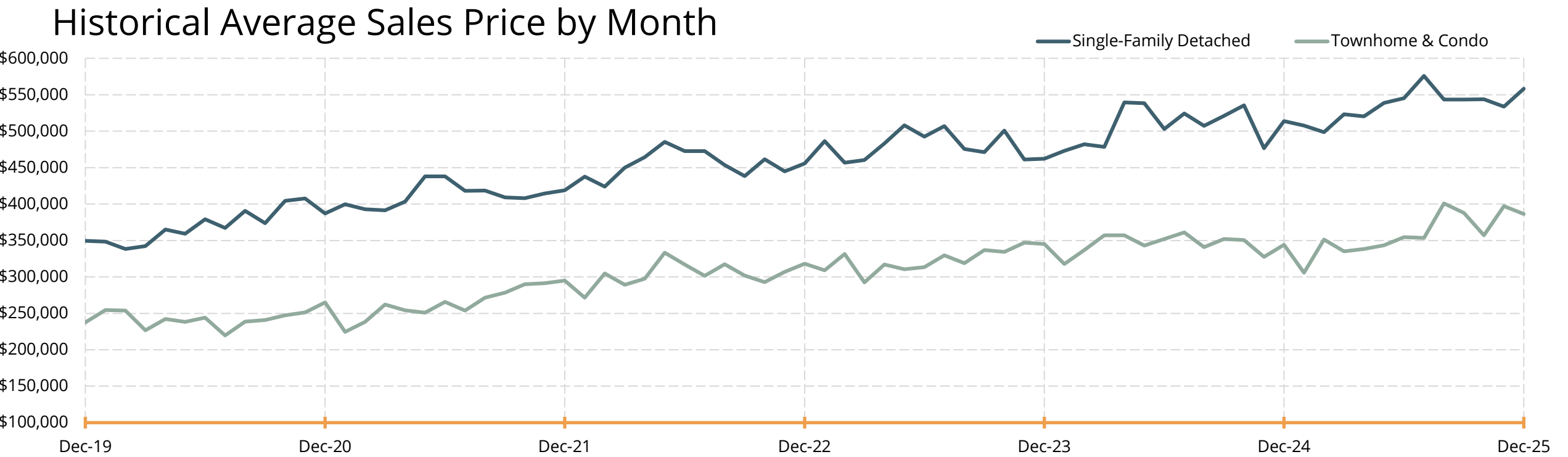
Average List Price



Average Sales Price

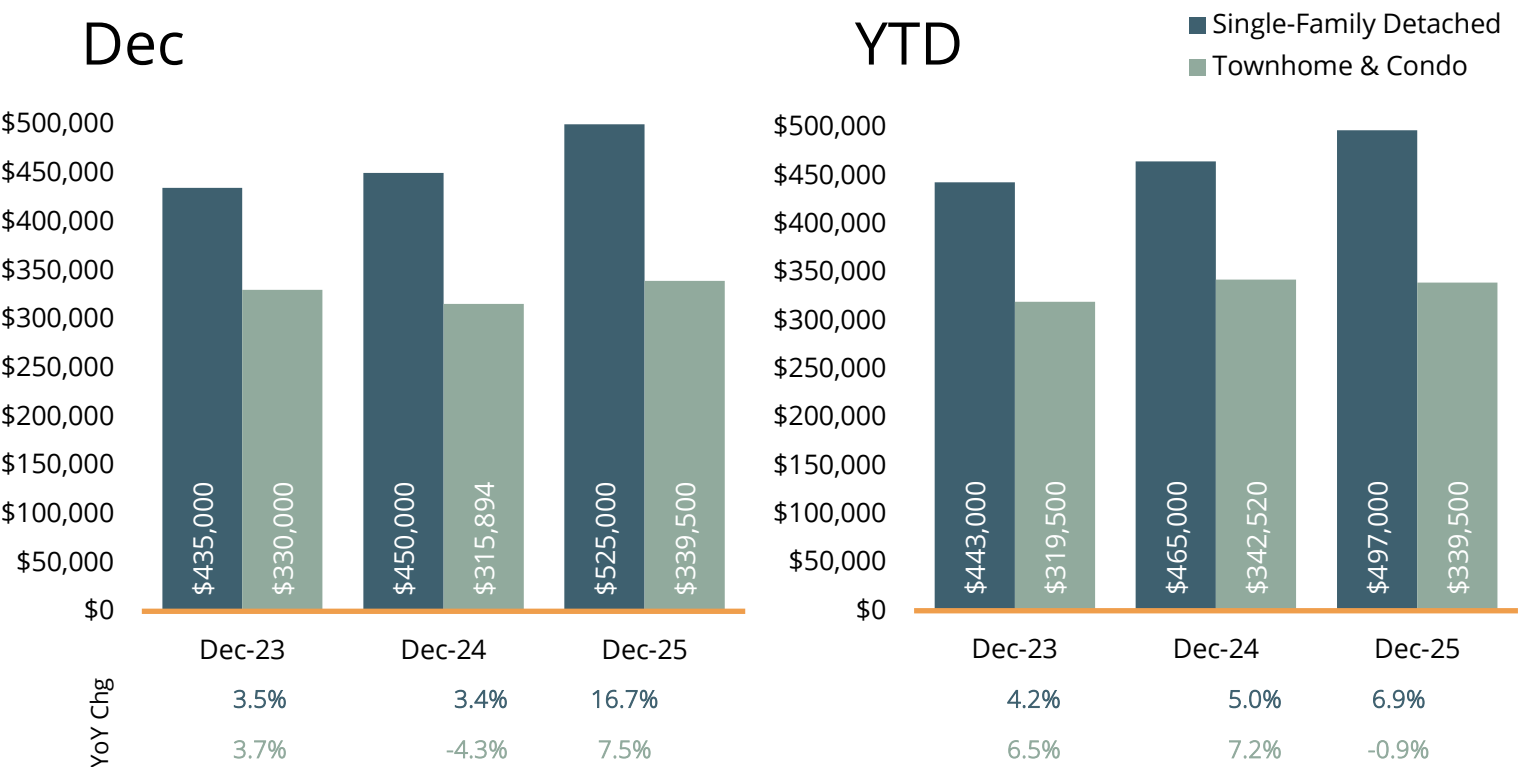


Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jan-25	\$507,786	7.3%	\$305,920	-3.7%
Feb-25	\$498,522	3.4%	\$351,316	4.3%
Mar-25	\$523,236	9.4%	\$335,184	-6.2%
Apr-25	\$520,217	-3.5%	\$338,200	-5.3%
May-25	\$538,884	0.1%	\$343,527	0.2%
Jun-25	\$545,072	8.4%	\$354,415	0.7%
Jul-25	\$575,845	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%
Nov-25	\$533,567	12.0%	\$397,225	21.3%
Dec-25	\$558,311	8.7%	\$386,296	12.2%
12-month Avg	\$536,007	5.6%	\$359,275	4.1%

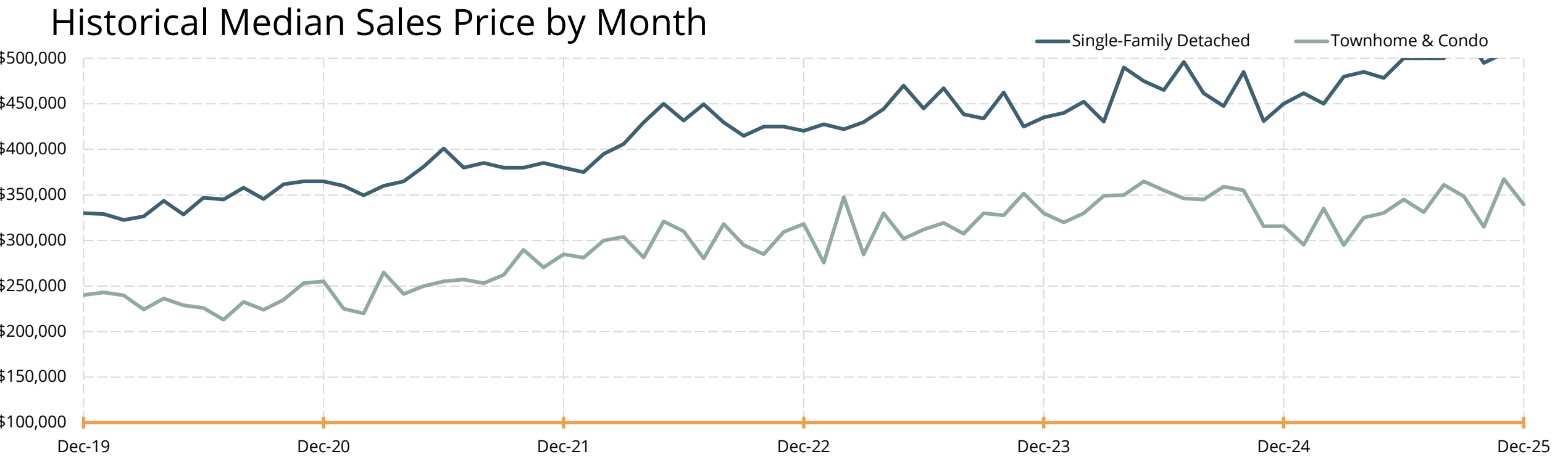


Source: Virginia REALTORS®, data accessed January 15, 2026

Median Sales Price

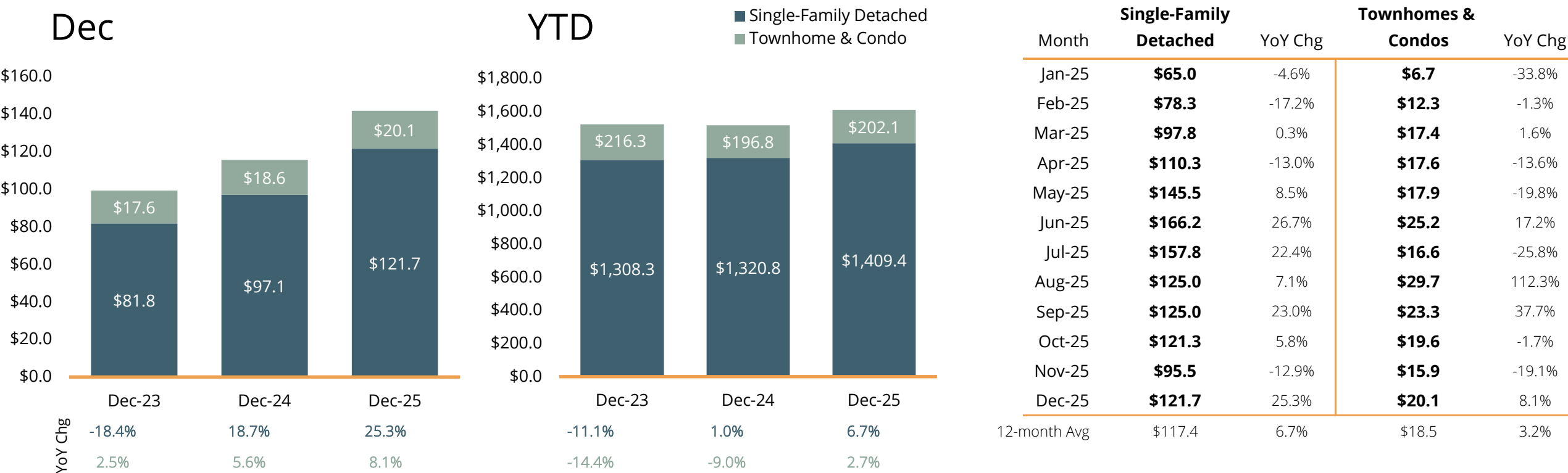


Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jan-25	\$461,723	4.9%	\$295,147	-7.8%
Feb-25	\$450,000	-0.6%	\$335,000	1.5%
Mar-25	\$480,000	11.5%	\$294,995	-15.5%
Apr-25	\$485,100	-1.0%	\$325,000	-7.1%
May-25	\$478,495	0.7%	\$330,250	-9.5%
Jun-25	\$499,999	7.5%	\$345,000	-2.8%
Jul-25	\$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%
Nov-25	\$505,540	17.3%	\$367,450	16.5%
Dec-25	\$525,000	16.7%	\$339,500	7.5%
12-month Avg	\$492,401	7.0%	\$332,320	-2.9%

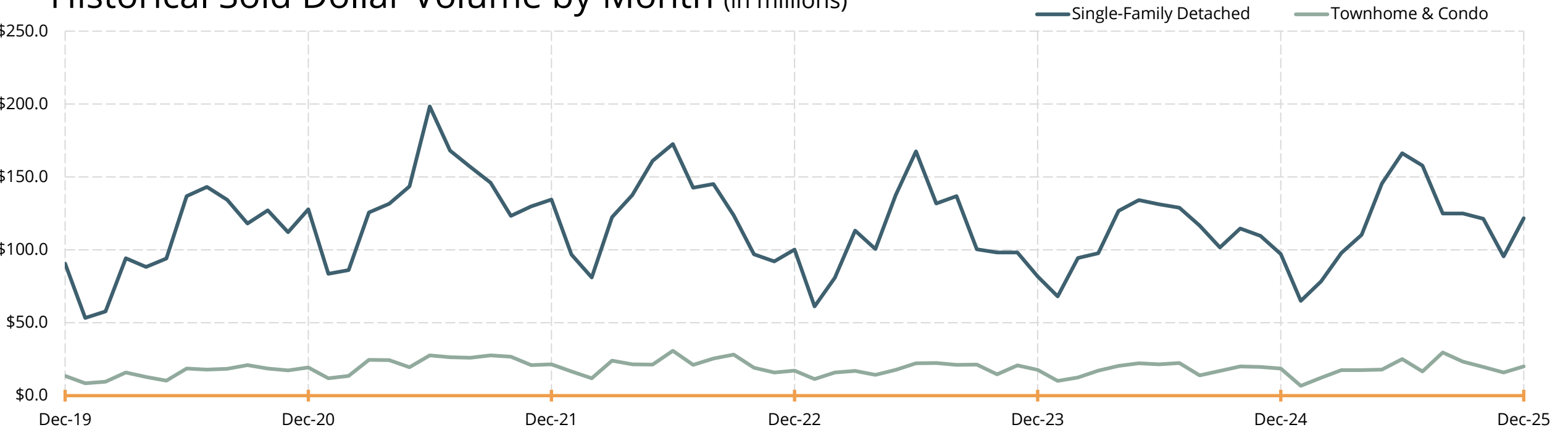


Source: Virginia REALTORS®, data accessed January 15, 2026

Sold Dollar Volume (in millions)

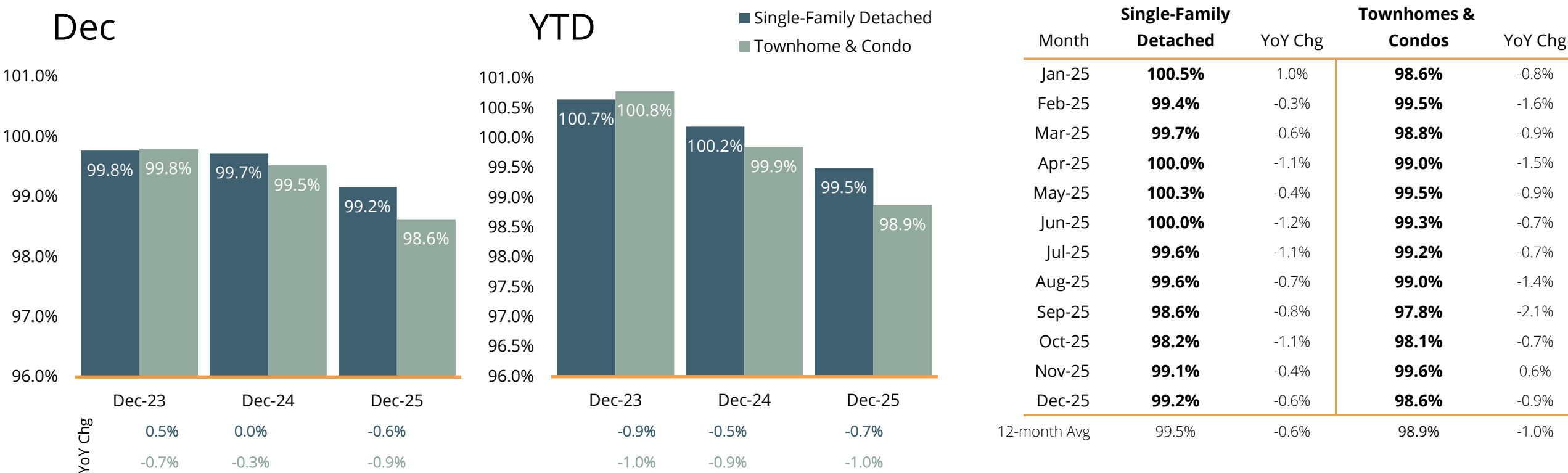


Historical Sold Dollar Volume by Month (in millions)

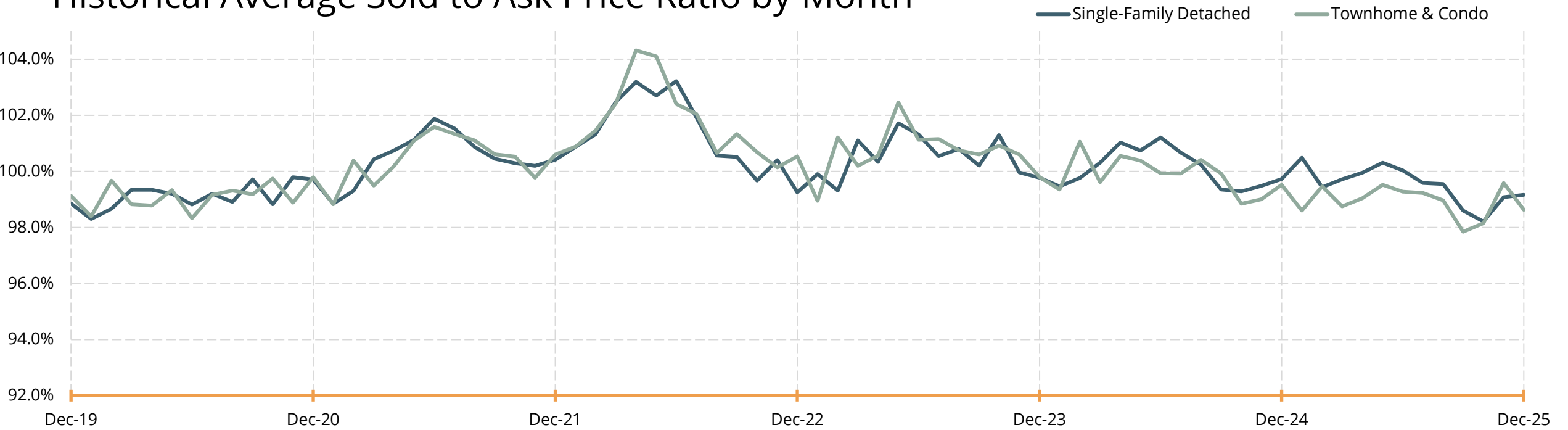


Source: Virginia REALTORS®, data accessed January 15, 2026

Average Sold to Ask Price Ratio

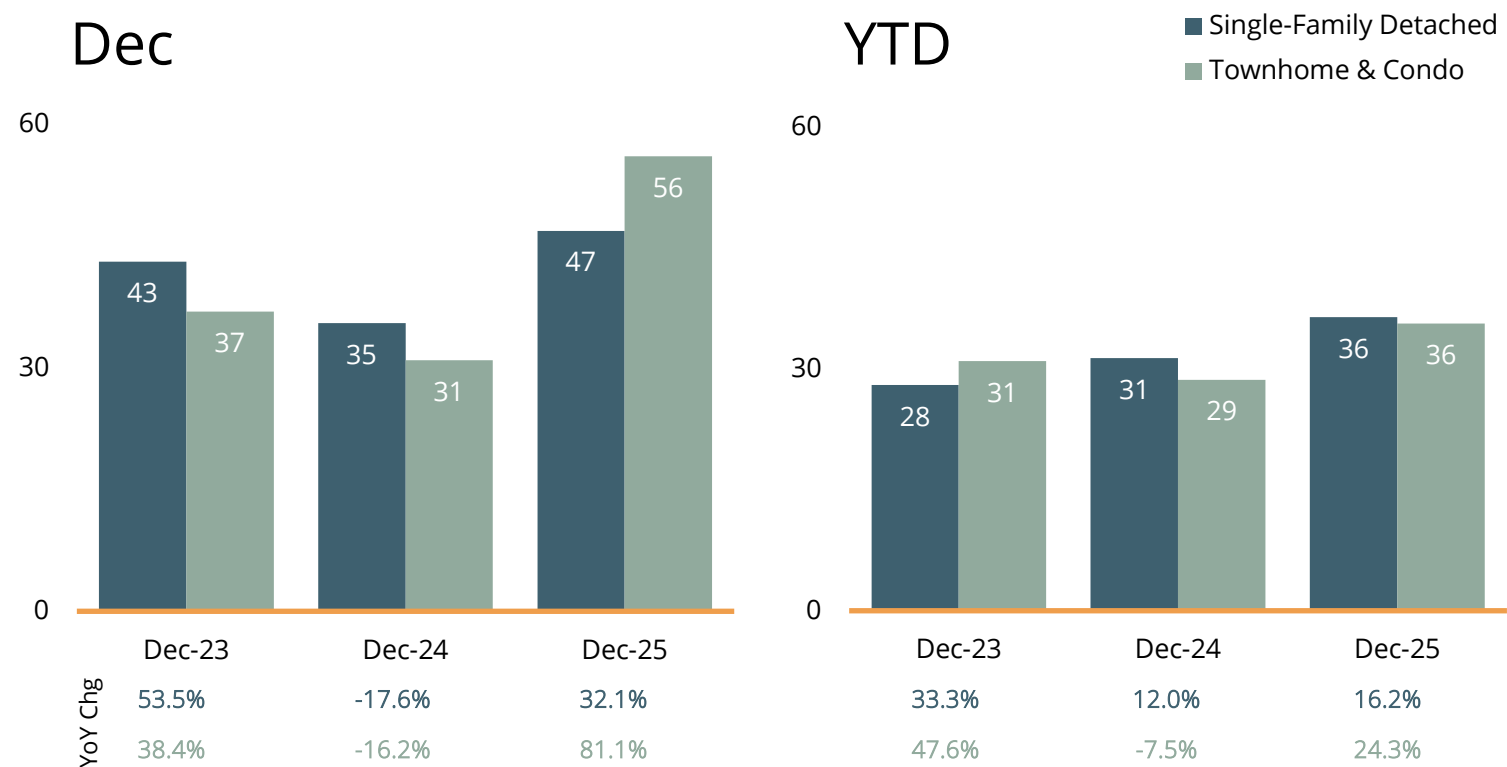


Historical Average Sold to Ask Price Ratio by Month



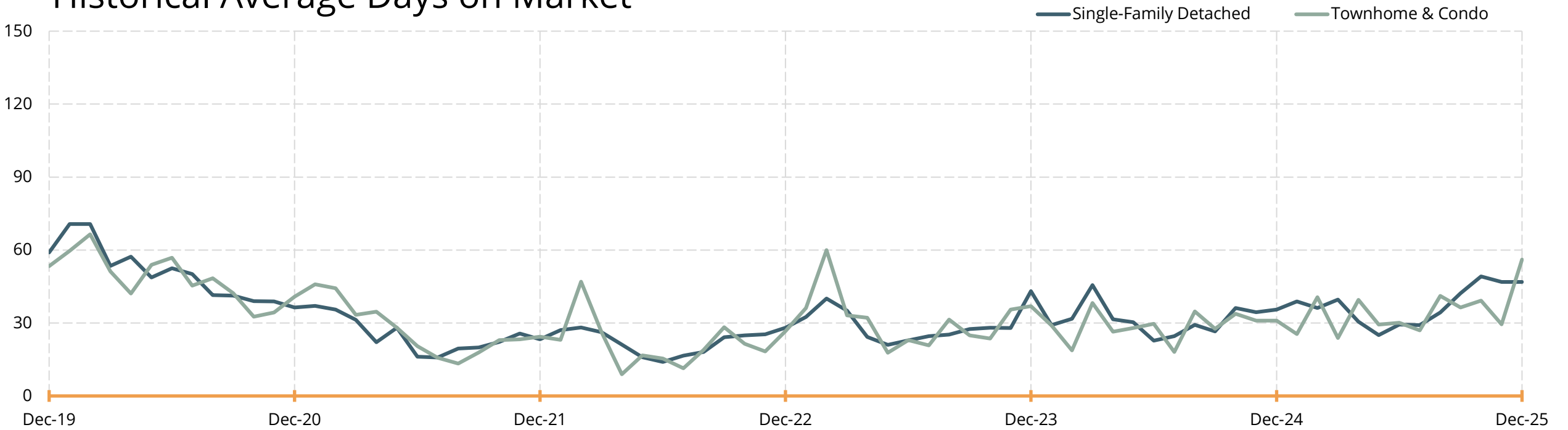
Source: Virginia REALTORS®, data accessed January 15, 2026

Average Days on Market



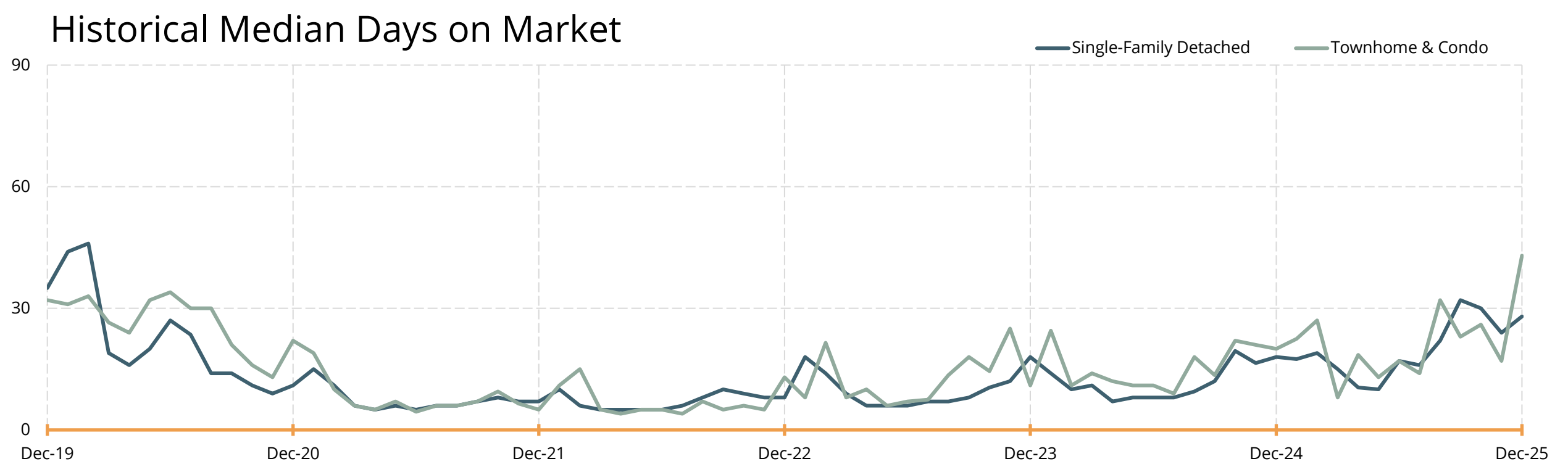
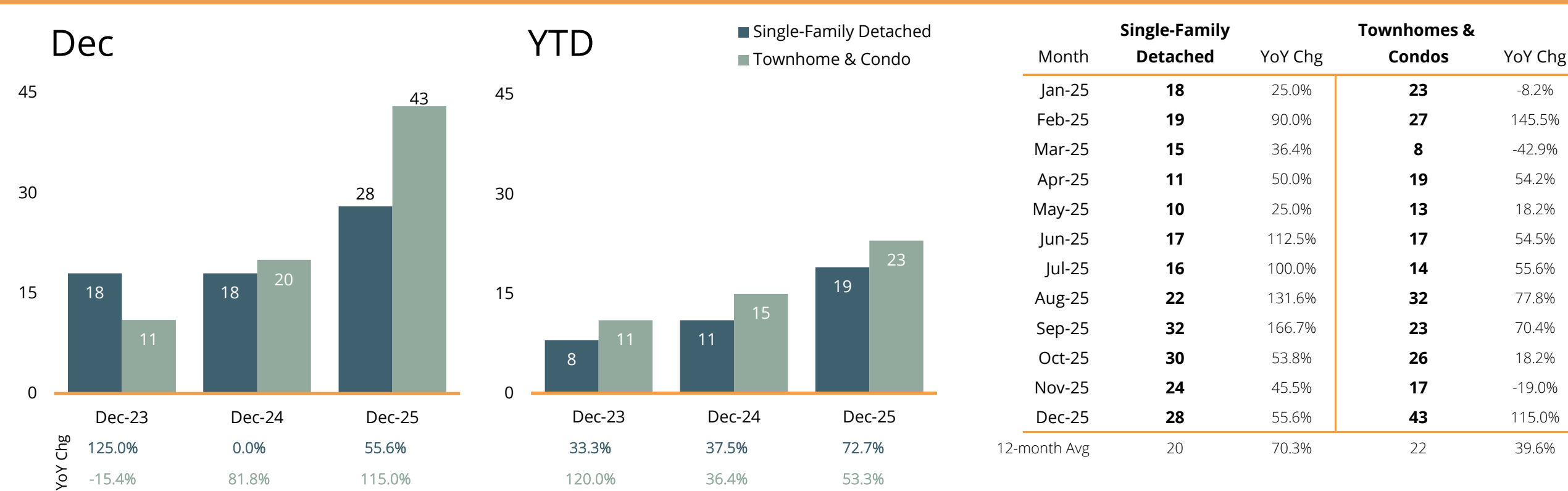
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jan-25	39	33.4%	26	-12.1%
Feb-25	36	14.0%	41	117.1%
Mar-25	40	-13.0%	24	-37.7%
Apr-25	30	-3.1%	40	49.5%
May-25	25	-17.5%	29	5.0%
Jun-25	29	29.1%	30	1.3%
Jul-25	29	18.7%	27	49.1%
Aug-25	34	17.1%	41	18.4%
Sep-25	42	59.4%	36	31.8%
Oct-25	49	35.9%	39	15.9%
Nov-25	47	36.3%	29	-5.1%
Dec-25	47	32.1%	56	81.1%
12-month Avg	37	18.8%	35	20.8%

Historical Average Days on Market

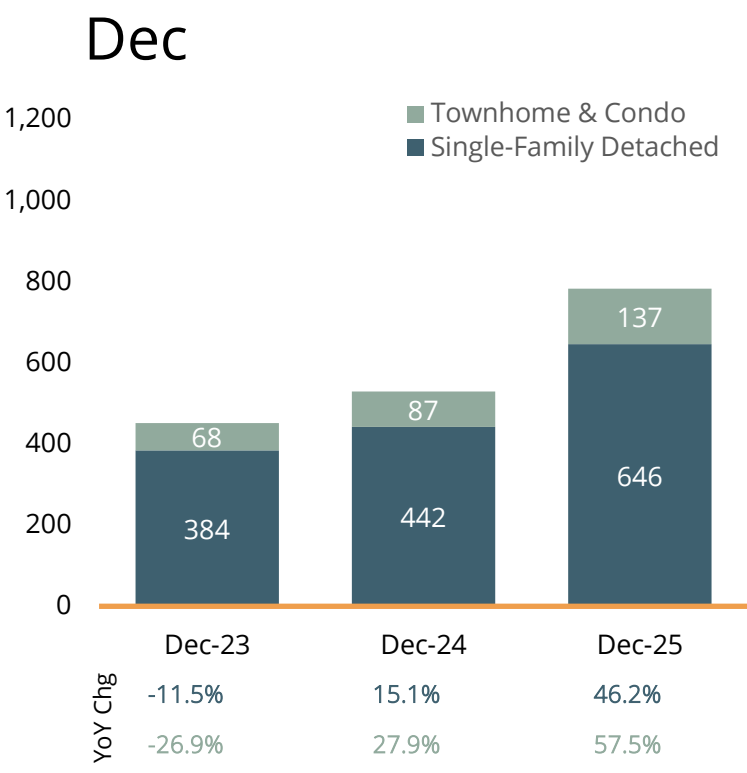


Source: Virginia REALTORS®, data accessed January 15, 2026

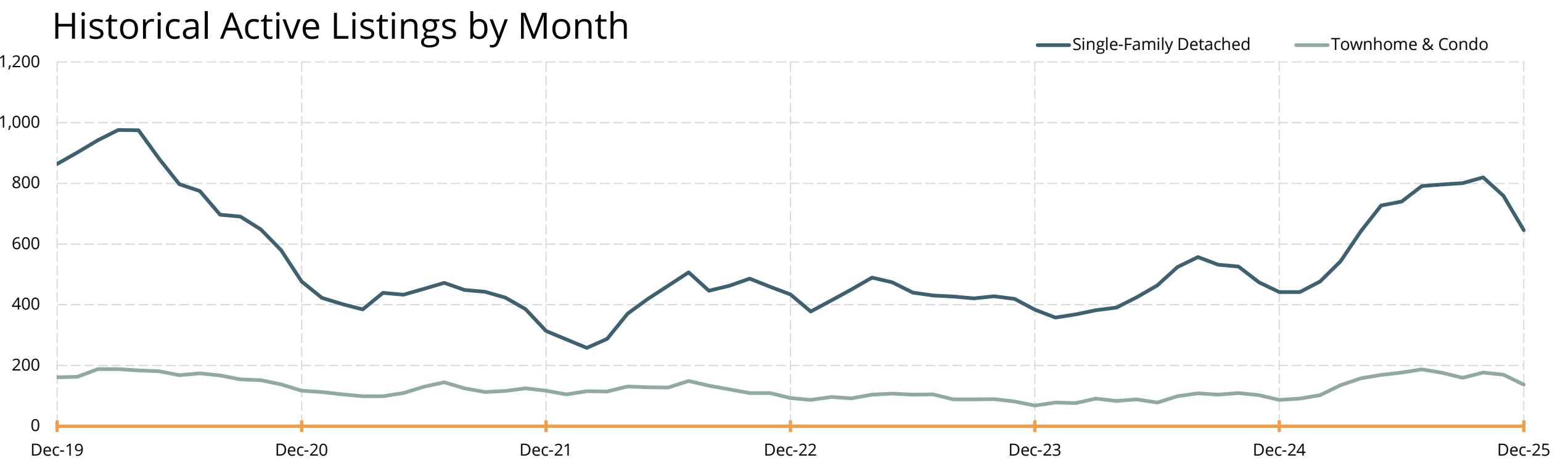
Median Days on Market



Active Listings



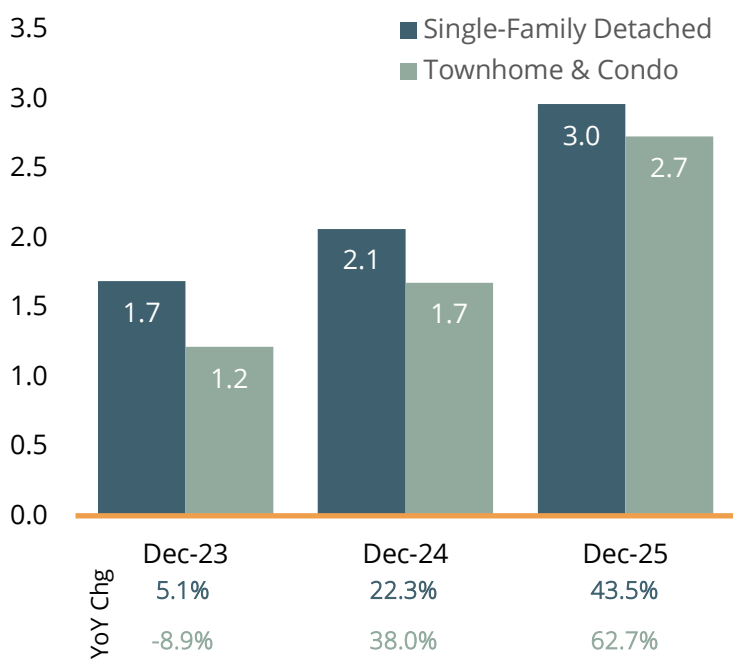
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Jan-25	442	23.5%	91	16.7%
Feb-25	477	29.6%	102	34.2%
Mar-25	543	42.1%	135	48.4%
Apr-25	642	64.2%	158	90.4%
May-25	727	71.1%	169	92.0%
Jun-25	740	59.5%	177	126.9%
Jul-25	791	51.0%	187	88.9%
Aug-25	796	42.9%	176	63.0%
Sep-25	801	50.6%	159	52.9%
Oct-25	820	55.9%	177	62.4%
Nov-25	759	60.1%	170	66.7%
Dec-25	646	46.2%	137	57.5%
12-month Avg	682	50.4%	153	66.6%



Months of Supply

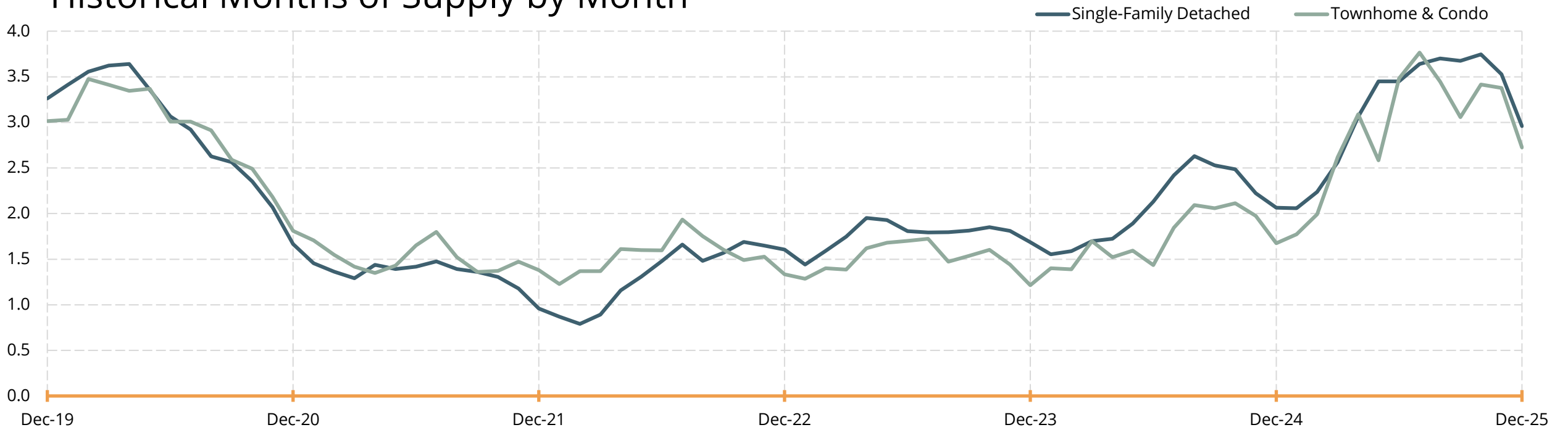


Dec



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
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%
Dec-25	3.0	43.5%	2.7	62.7%
12-month Avg	3.2	52.7%	2.9	69.8%

Historical Months of Supply by Month



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

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

Area Overview - Total Market YTD



New Listings YTD				Sales YTD			Average Sales Price TYD			Median Sales Price TYD			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	2,108	17.6%	1,509	1,496	-0.9%	\$517,868	\$544,997	5.2%	\$450,000	\$490,000	8.9%	218	345	58.3%
Williamsburg	256	309	20.7%	213	187	-12.2%	\$430,524	\$462,740	7.5%	\$397,000	\$412,000	3.8%	35	62	77.1%
York County	993	1,197	20.5%	962	987	2.6%	\$454,901	\$479,973	5.5%	\$423,527	\$450,000	6.3%	138	192	39.1%
New Kent County	640	837	30.8%	479	511	6.7%	\$458,547	\$476,283	3.9%	\$415,000	\$445,000	7.2%	131	178	35.9%
Charles City County	60	56	-6.7%	52	44	-15.4%	\$306,990	\$394,560	28.5%	\$280,000	\$304,975	8.9%	7	6	-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	84	23.5%	79	84	6.3%	\$573,763	\$616,933	7.5%	\$480,000	\$577,500	20.3%	167	267	59.9%	1.7	3.3	94.2%
Williamsburg	9	5	-44.4%	8	19	137.5%	\$518,250	\$469,238	-9.5%	\$455,500	\$485,000	6.5%	25	36	44.0%	2.3	5.0	119.3%
York County	54	45	-16.7%	60	70	16.7%	\$477,583	\$558,142	16.9%	\$458,750	\$542,000	18.1%	124	162	30.6%	1.9	7.7	300.0%
New Kent County	34	34	0.0%	35	42	20.0%	\$482,371	\$503,164	4.3%	\$424,990	\$497,250	17.0%	119	175	47.1%	3.3	3.8	17.7%
Charles City County	1	3	200.0%	7	3	-57.1%	\$298,429	\$257,000	-13.9%	\$265,000	\$275,000	3.8%	7	6	-14.3%	1.7	6.2	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	1,683	14.7%	1,202	1,176	-2.2%	\$559,571	\$586,864	4.9%	\$488,500	\$534,000	9.3%	167	267	59.9%
Williamsburg	170	207	21.8%	134	127	-5.2%	\$487,432	\$513,555	5.4%	\$450,000	\$472,000	4.9%	25	36	44.0%
York County	833	988	18.6%	771	801	3.9%	\$482,755	\$514,235	6.5%	\$460,000	\$492,903	7.2%	124	162	30.6%
New Kent County	577	783	35.7%	434	465	7.1%	\$473,882	\$490,227	3.4%	\$433,308	\$462,450	6.7%	119	175	47.1%
Charles City County	60	56	-6.7%	52	44	-15.4%	\$306,990	\$394,560	28.5%	\$280,000	\$304,975	8.9%	7	6	-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	18	12.5%	25	21	-16.0%	\$336,912	\$448,614	33.2%	\$300,000	\$362,500	20.8%	51	78	52.9%	2.0	2.9	47.2%
Williamsburg	3	3	0.0%	7	8	14.3%	\$434,557	\$389,074	-10.5%	\$369,900	\$281,451	-23.9%	10	26	160.0%	1.5	5.2	251.0%
York County	6	9	50.0%	16	17	6.3%	\$322,730	\$331,553	2.7%	\$323,001	\$335,000	3.7%	14	30	114.3%	0.9	2.0	128.7%
New Kent County	4	1	-75.0%	6	6	0.0%	\$326,668	\$319,583	-2.2%	\$327,995	\$324,750	-1.0%	12	3	-75.0%	3.2	0.8	-75.5%
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	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	425	30.8%	307	320	4.2%	\$354,567	\$390,035	10.0%	\$345,000	\$365,000	5.8%	51	78	52.9%
Williamsburg	86	102	18.6%	79	60	-24.1%	\$340,479	\$356,875	4.8%	\$345,000	\$306,500	-11.2%	10	26	160.0%
York County	160	209	30.6%	191	186	-2.6%	\$343,040	\$325,313	-5.2%	\$354,681	\$330,000	-7.0%	14	30	114.3%
New Kent County	63	54	-14.3%	45	46	2.2%	\$315,861	\$335,323	6.2%	\$312,995	\$329,363	5.2%	12	3	-75.0%
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.