

WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

WAAR Market Indicators Report



Key Market Trends: February 2026

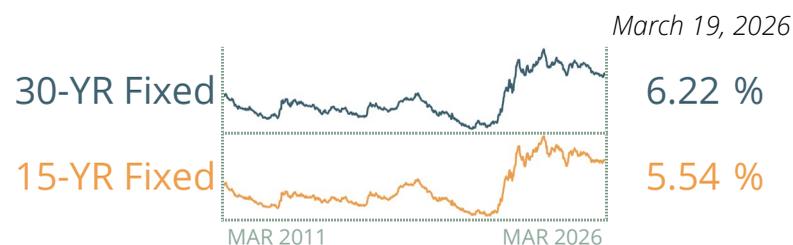
- After going up the last two months, sales fell in the WAAR market.** There were 171 total sales in the month of February, 10.9% less than the year before, which is 21 fewer sales. James City County experienced the biggest drop-off in activity with 12 fewer home sales than last year (-13.5%). The number of sales remained the same in York County and Charles City County this month.
- Regionwide, pending sales continued to climb in February.** Pending sales increased 11.6% in the WAAR area leading to 212 this month, 22 more than the year prior. The two markets with the sharpest increase in pending sales were York County with 13 more than last year (+43.3%) and James City County with nine additional pending sales (+9.2%). For the second straight month, pending sales dipped in Williamsburg (-50.0%).
- Home prices dropped after rising for the last nine months.** The median sales price was \$400,500 in the WAAR area, \$23,450 less than the previous year, decreasing by 5.5%. There were significant price gains in Charles City County with the median price \$326,250 more than a year ago (+114.0%) and James City County with prices up \$45,000 (+11.4%). Williamsburg saw a \$74,000 median price drop this month (-17.1%) and the median price fell by \$63,235 in York County (-13.8%).
- Listings surged across the WAAR footprint this month.** February ended with 238 more listings on the market resulting in 817 total active listings in the area, jumping 41.1% from a year earlier. All local markets saw listing activity grow this month with James City County (+118 listings) and York County (+60 listings) seeing the largest influx of listings.



WAAR Market Dashboard

YoY Chg	Feb-26	Indicator
▼ -10.9%	171	Sales
▲ 11.6%	212	Pending Sales
▲ 26.9%	373	New Listings
▼ -4.6%	\$451,710	Average List Price
▼ -4.9%	\$448,446	Average Sales Price
▼ -5.5%	\$400,500	Median Sales Price
▲ 2.4%	\$217	Average Price Per Square Foot
▼ -15.3%	\$76.7	Sold Dollar Volume (in millions)
▼ -0.5%	99.0%	Average Sold/Ask Price Ratio
▲ 65.5%	61	Average Days on Market
▲ 100.0%	39	Median Days on Market
▲ 41.1%	817	Active Listings
▲ 38.7%	3.0	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.

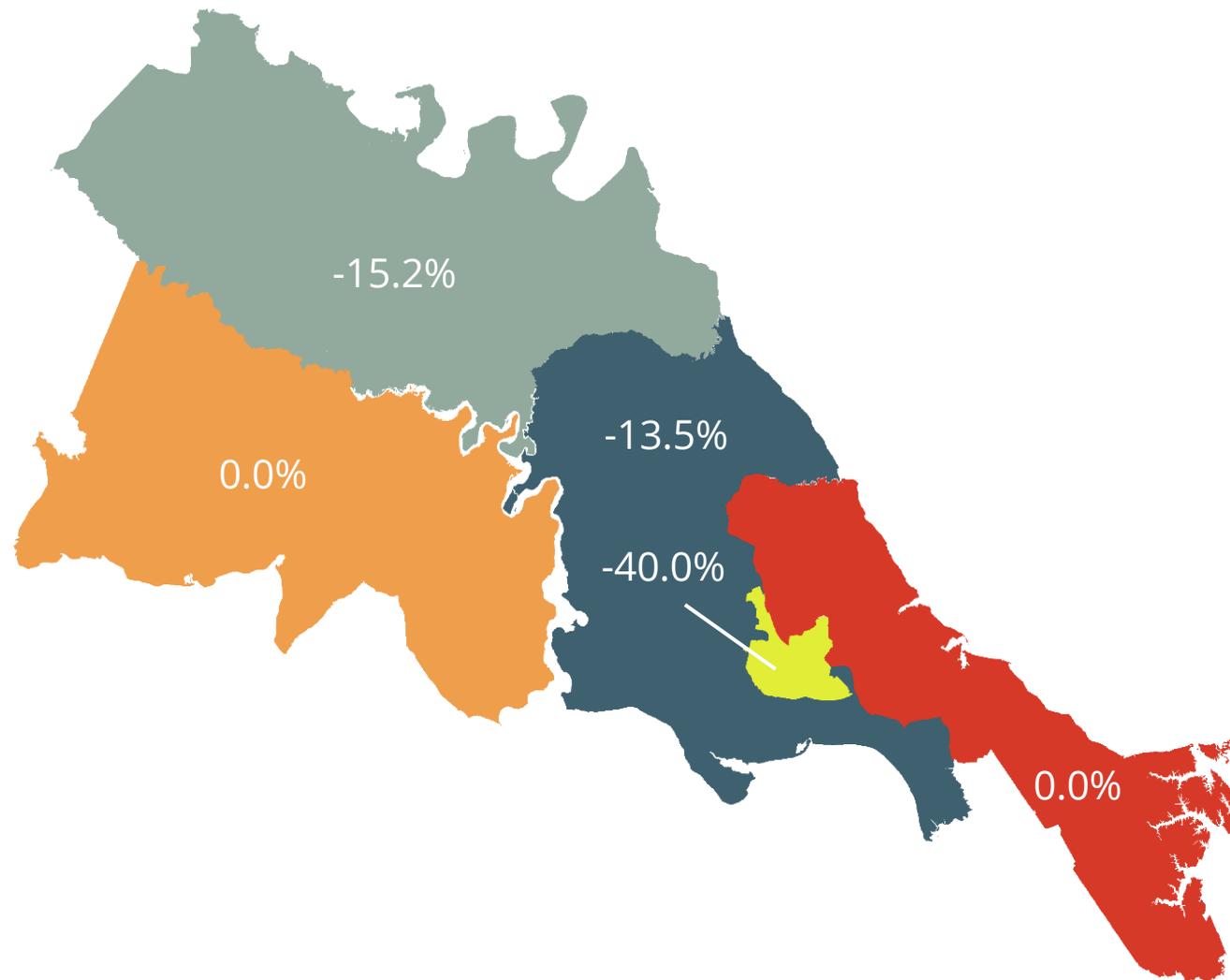
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



Jurisdiction	Total Sales		
	Feb-25	Feb-26	% Chg
Charles City County	2	2	0.0%
James City County	89	77	-13.5%
New Kent County	33	28	-15.2%
Williamsburg	10	6	-40.0%
York County	58	58	0.0%
WAAR	192	171	-10.9%

Total Market Overview



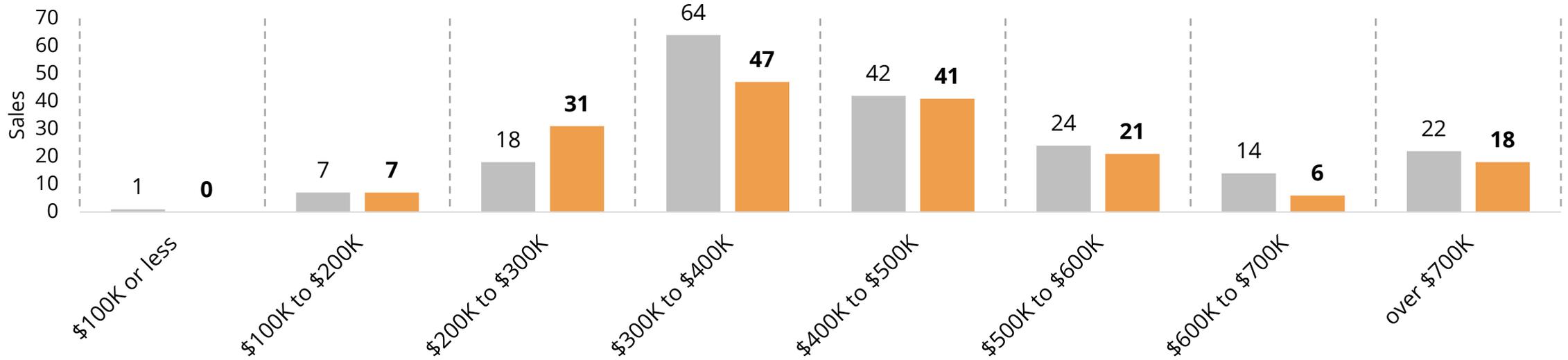
Key Metrics	2-year Trends		Feb-25	Feb-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Feb-24	Feb-26						
Sales			192	171	-10.9%	342	342	0.0%
Pending Sales			190	212	11.6%	360	414	15.0%
New Listings			294	373	26.9%	565	682	20.7%
Average List Price			\$473,377	\$451,710	-4.6%	\$476,808	\$484,849	1.7%
Average Sales Price			\$471,688	\$448,446	-4.9%	\$476,410	\$476,752	0.1%
Median Sales Price			\$423,950	\$400,500	-5.5%	\$425,000	\$420,000	-1.2%
Average Price Per Square Foot			\$212	\$217	2.4%	\$218	\$223	2.4%
Sold Dollar Volume (in millions)			\$90.6	\$76.7	-15.3%	\$162.3	\$163.1	0.5%
Average Sold/Ask Price Ratio			99.4%	99.0%	-0.5%	99.8%	98.5%	-1.3%
Average Days on Market			37	61	65.5%	37	55	49.4%
Median Days on Market			20	39	100.0%	19	37	100.0%
Active Listings			579	817	41.1%	n/a	n/a	n/a
Months of Supply			2.2	3.0	38.7%	n/a	n/a	n/a

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

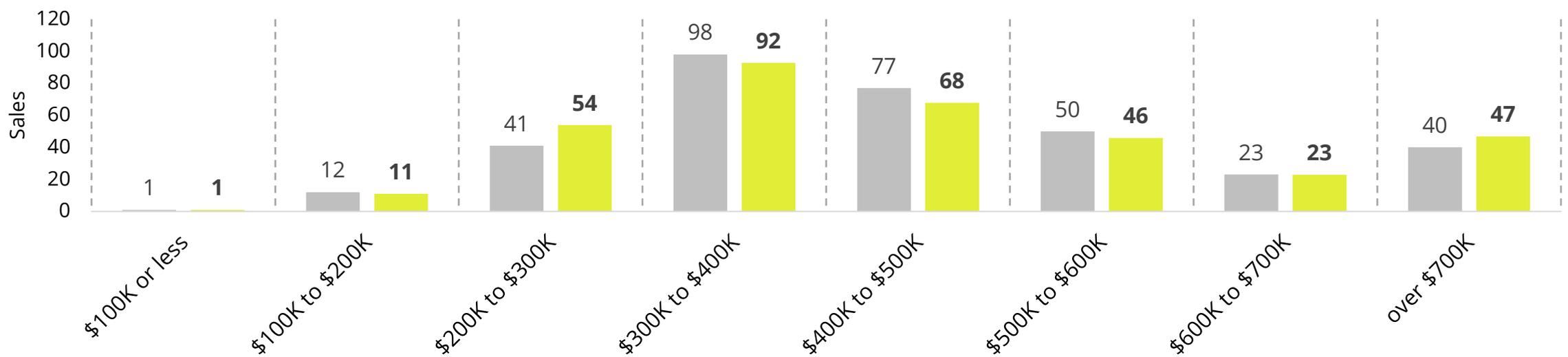
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



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

Single-Family Detached Market Overview



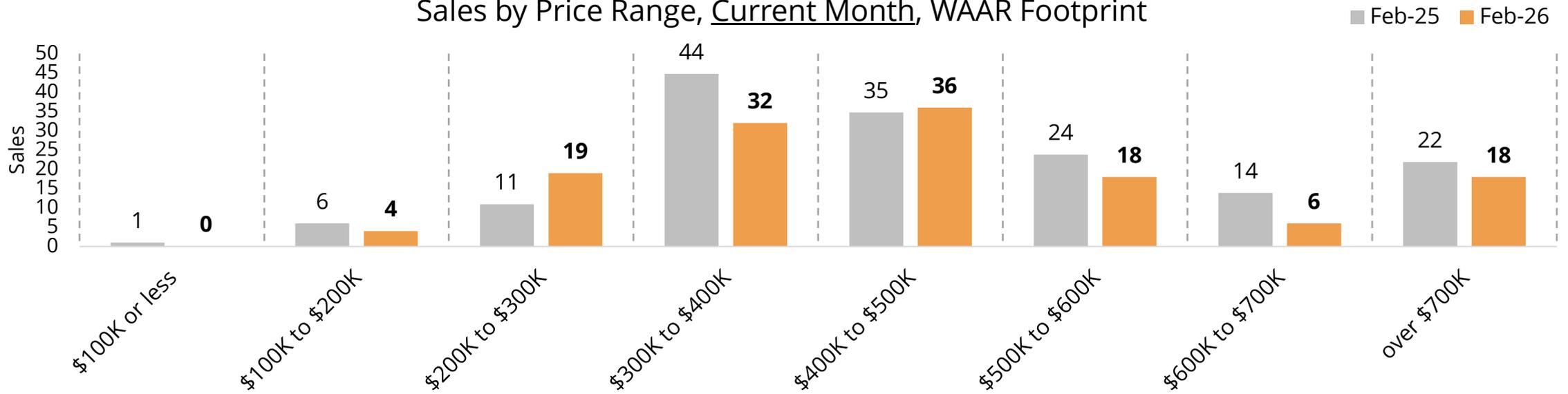
Key Metrics	2-year Trends		Feb-25	Feb-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Feb-24	Feb-26						
Sales			157	133	-15.3%	285	276	-3.2%
Pending Sales			157	183	16.6%	301	355	17.9%
New Listings			244	292	19.7%	471	541	14.9%
Average List Price			\$500,148	\$483,252	-3.4%	\$503,369	\$514,335	2.2%
Average Sales Price			\$498,522	\$480,941	-3.5%	\$503,481	\$506,025	0.5%
Median Sales Price			\$450,000	\$444,990	-1.1%	\$460,945	\$465,305	0.9%
Average Price Per Square Foot			\$214	\$219	2.5%	\$221	\$224	1.7%
Sold Dollar Volume (in millions)			\$78.3	\$64.0	-18.3%	\$143.3	\$139.7	-2.5%
Average Sold/Ask Price Ratio			99.4%	99.2%	-0.2%	99.9%	98.6%	-1.3%
Average Days on Market			36	63	74.2%	37	56	52.0%
Median Days on Market			19	40	110.5%	17	38	123.5%
Active Listings			477	645	35.2%	n/a	n/a	n/a
Months of Supply			2.2	3.0	32.4%	n/a	n/a	n/a

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

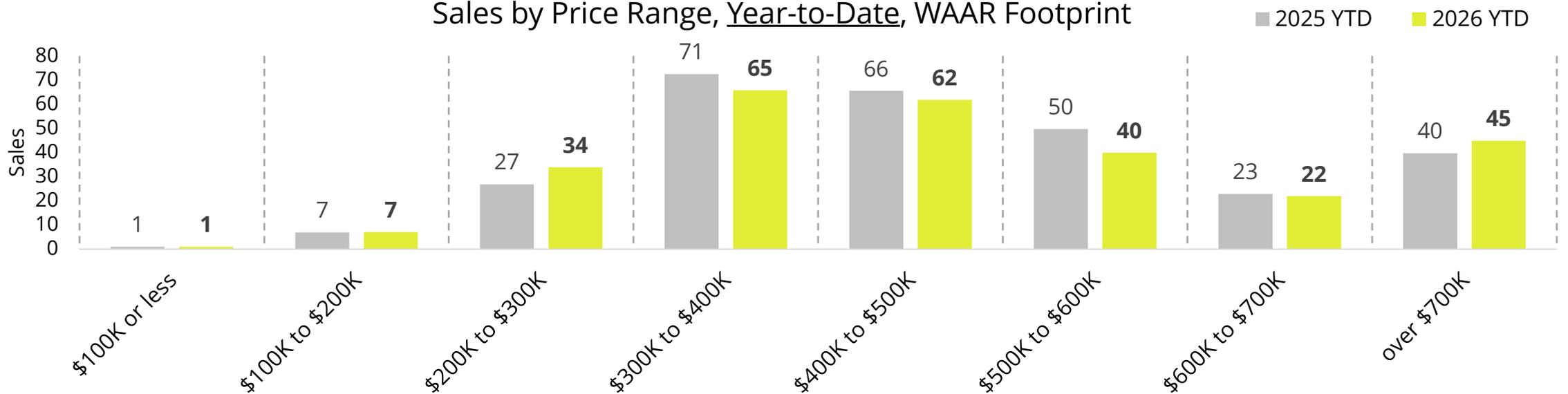
Single-Family Detached Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



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

Townhome & Condo Market Overview



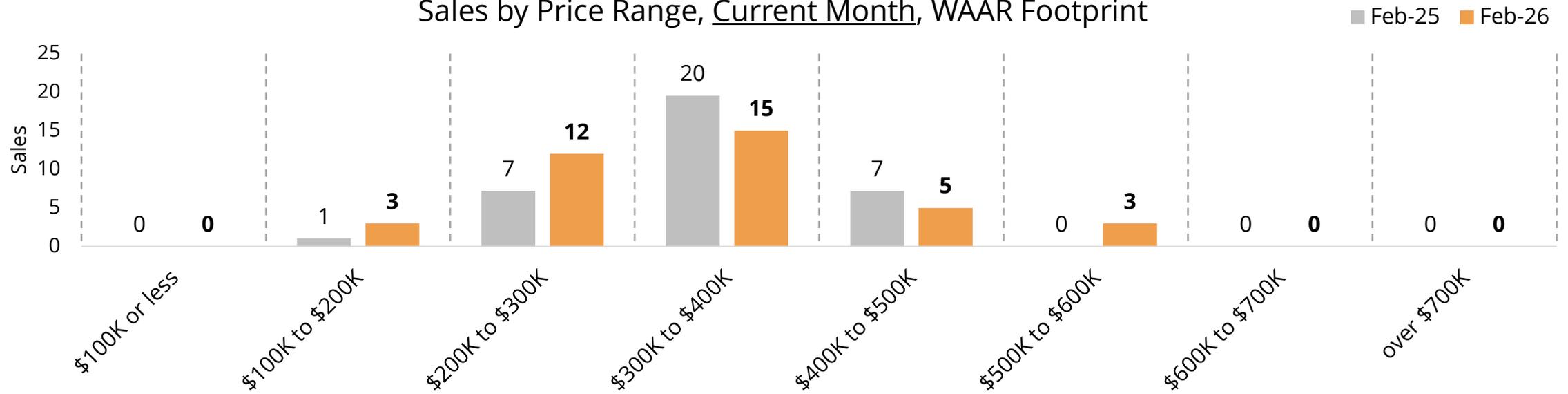
Key Metrics	2-year Trends		Feb-25	Feb-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Feb-24	Feb-26						
Sales			35	38	8.6%	57	66	15.8%
Pending Sales			33	29	-12.1%	59	59	0.0%
New Listings			50	81	62.0%	94	141	50.0%
Average List Price			\$353,290	\$341,313	-3.4%	\$338,212	\$361,100	6.8%
Average Sales Price			\$351,316	\$334,711	-4.7%	\$335,151	\$353,894	5.6%
Median Sales Price			\$335,000	\$328,500	-1.9%	\$335,000	\$334,950	0.0%
Average Price Per Square Foot			\$197	\$207	5.3%	\$190	\$218	14.4%
Sold Dollar Volume (in millions)			\$12.3	\$12.7	3.4%	\$19.0	\$23.4	22.8%
Average Sold/Ask Price Ratio			99.5%	98.0%	-1.5%	99.1%	98.1%	-1.1%
Average Days on Market			41	55	35.1%	36	50	39.0%
Median Days on Market			27	34	24.1%	27	33	22.2%
Active Listings			102	172	68.6%	n/a	n/a	n/a
Months of Supply			2.0	3.4	68.6%	n/a	n/a	n/a

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

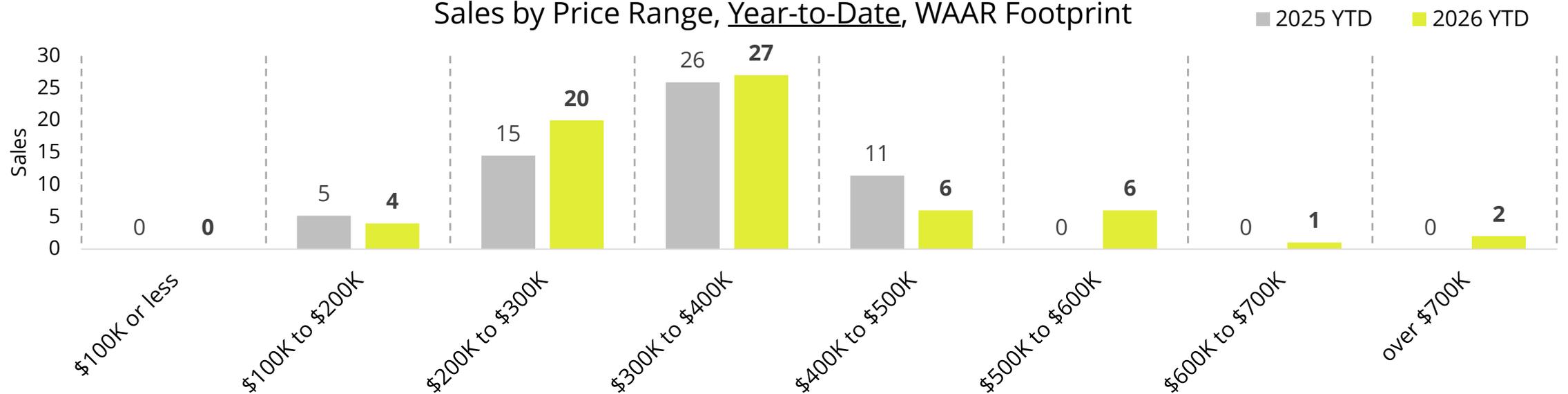
Townhome & Condo Market by Price Range



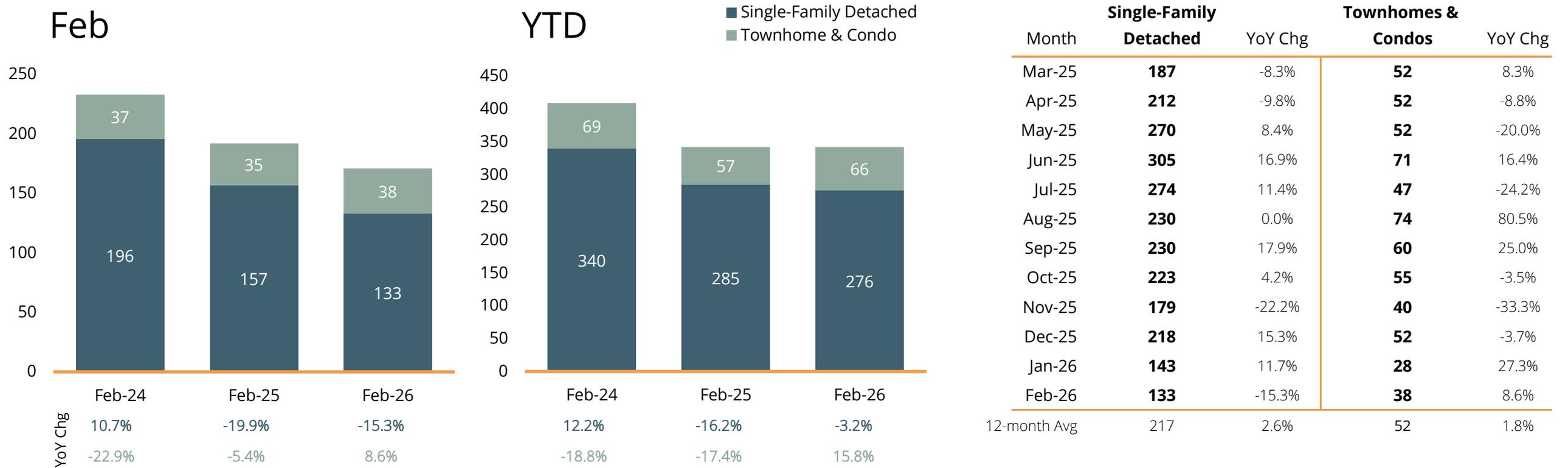
Sales by Price Range, Current Month, WAAR Footprint



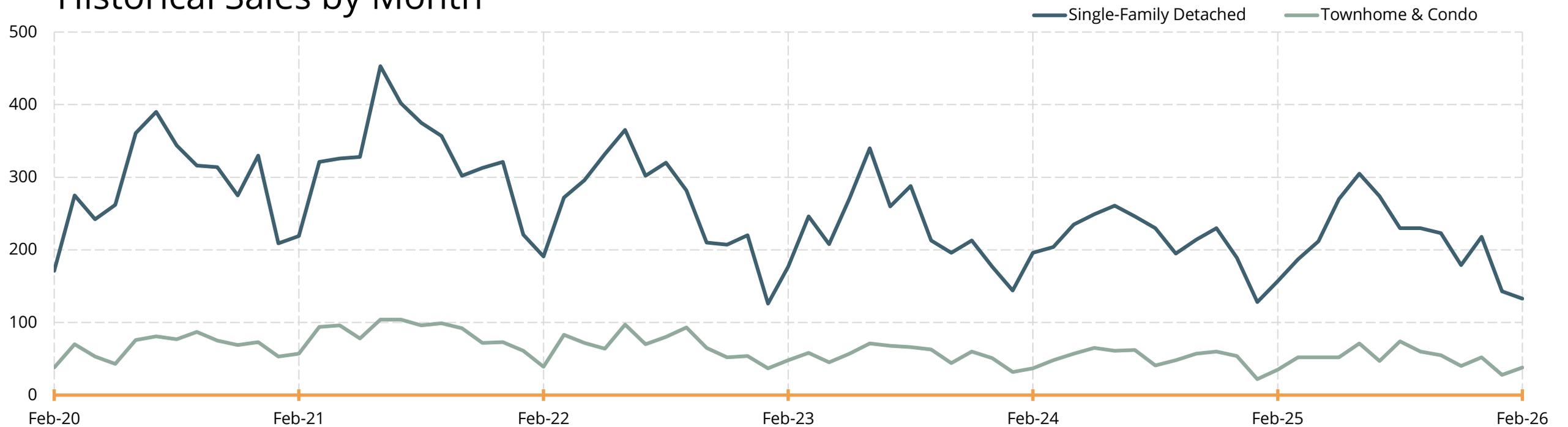
Sales by Price Range, Year-to-Date, WAAR Footprint



Sales

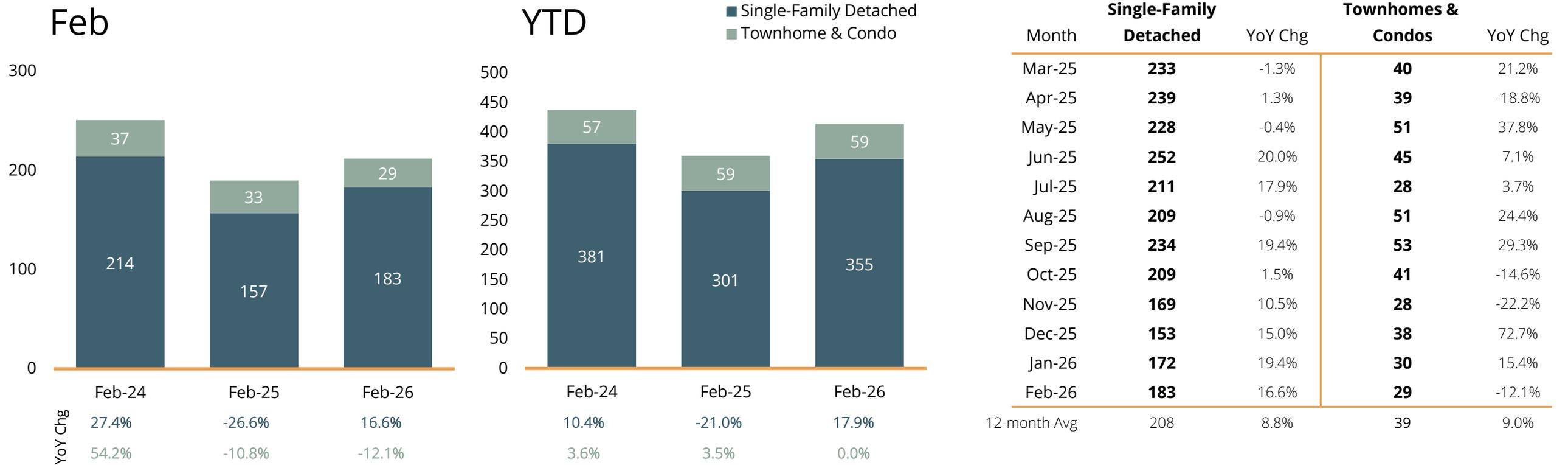


Historical Sales by Month

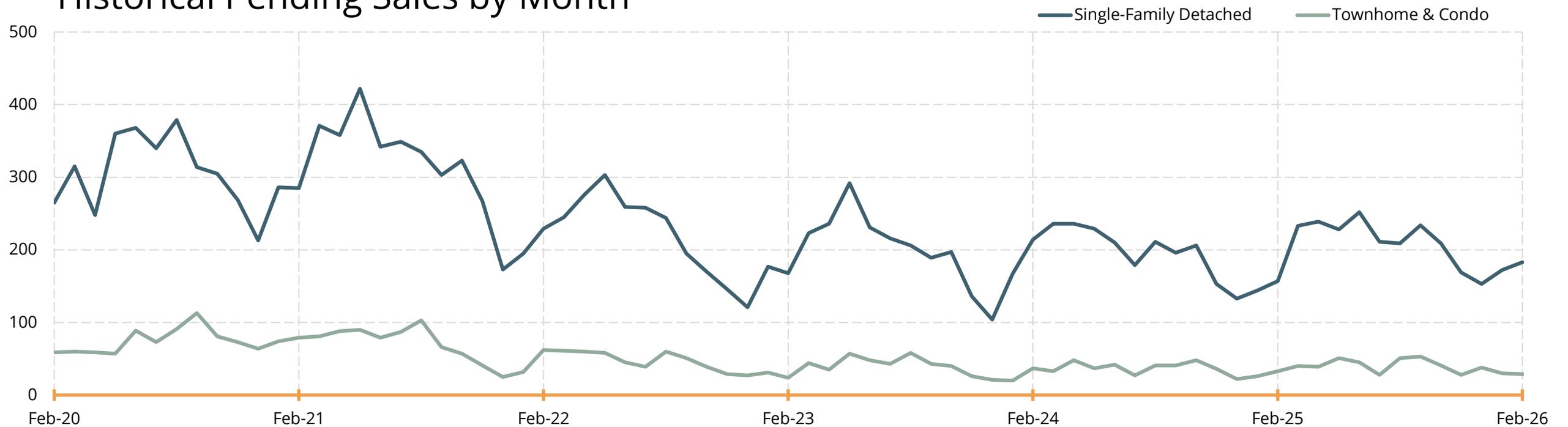


Source: Virginia REALTORS®, data accessed March 15, 2026

Pending Sales

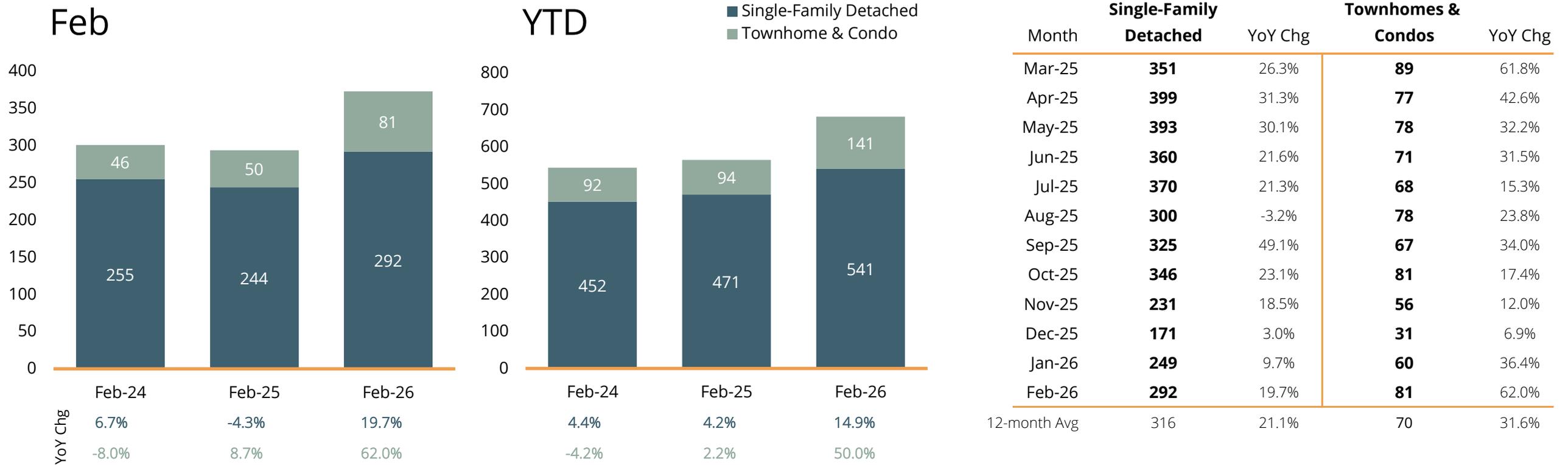


Historical Pending Sales by Month

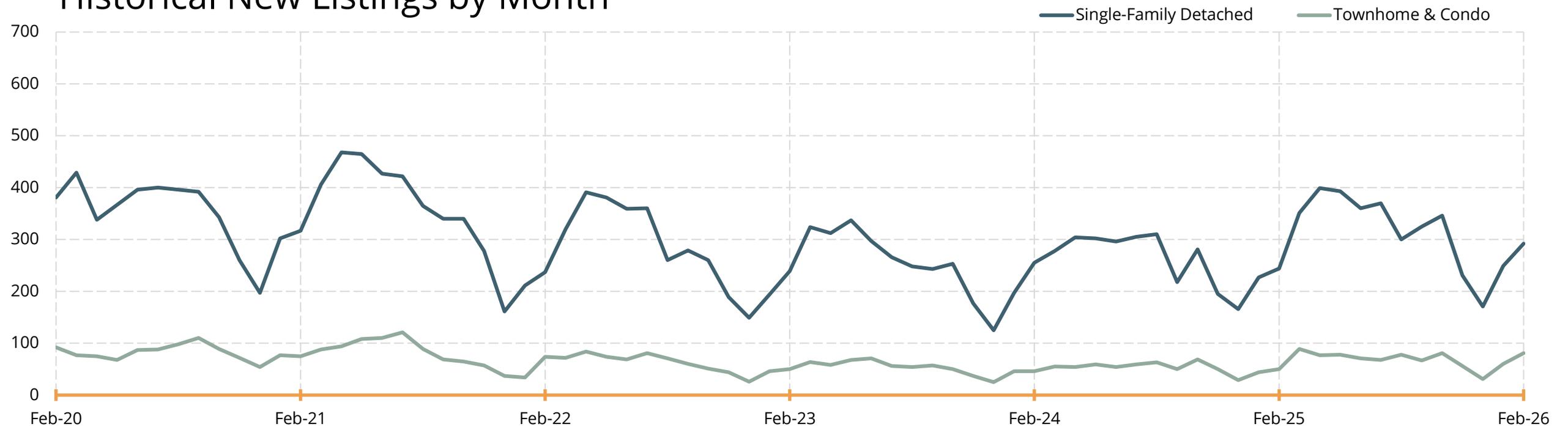


Source: Virginia REALTORS®, data accessed March 15, 2026

New Listings

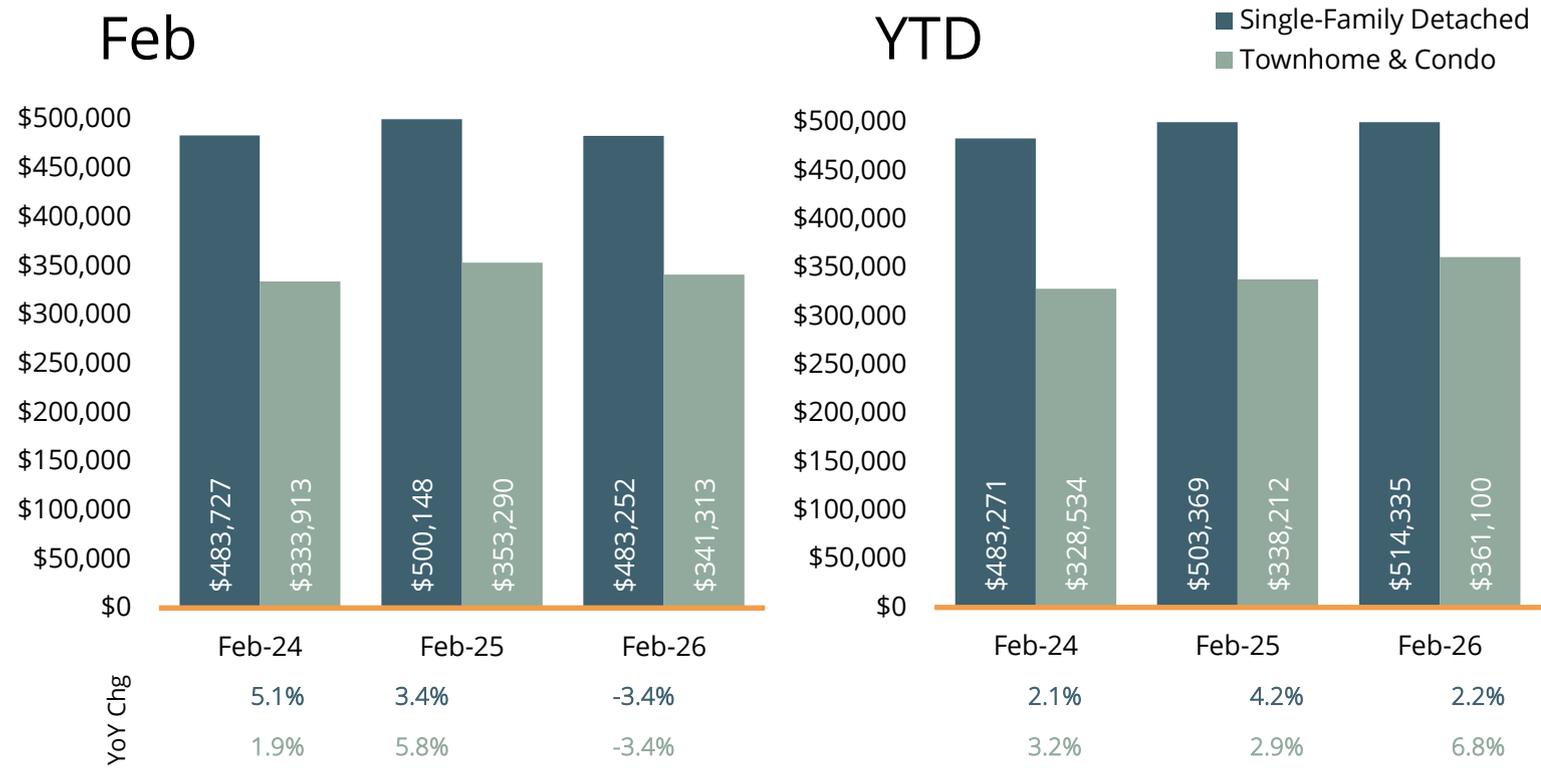


Historical New Listings by Month



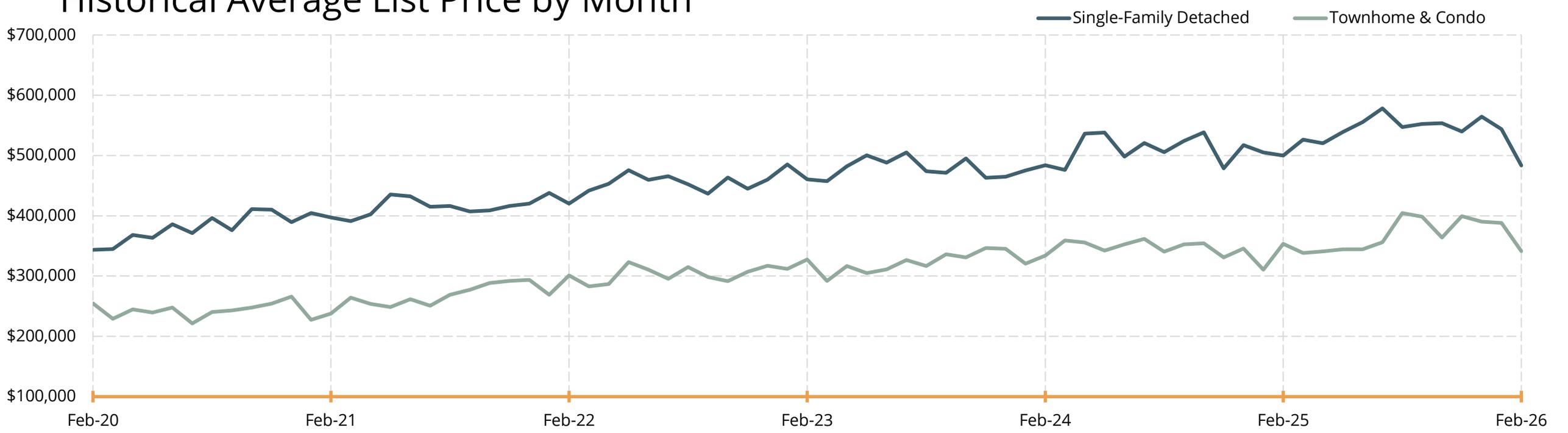
Source: Virginia REALTORS®, data accessed March 15, 2026

Average List Price



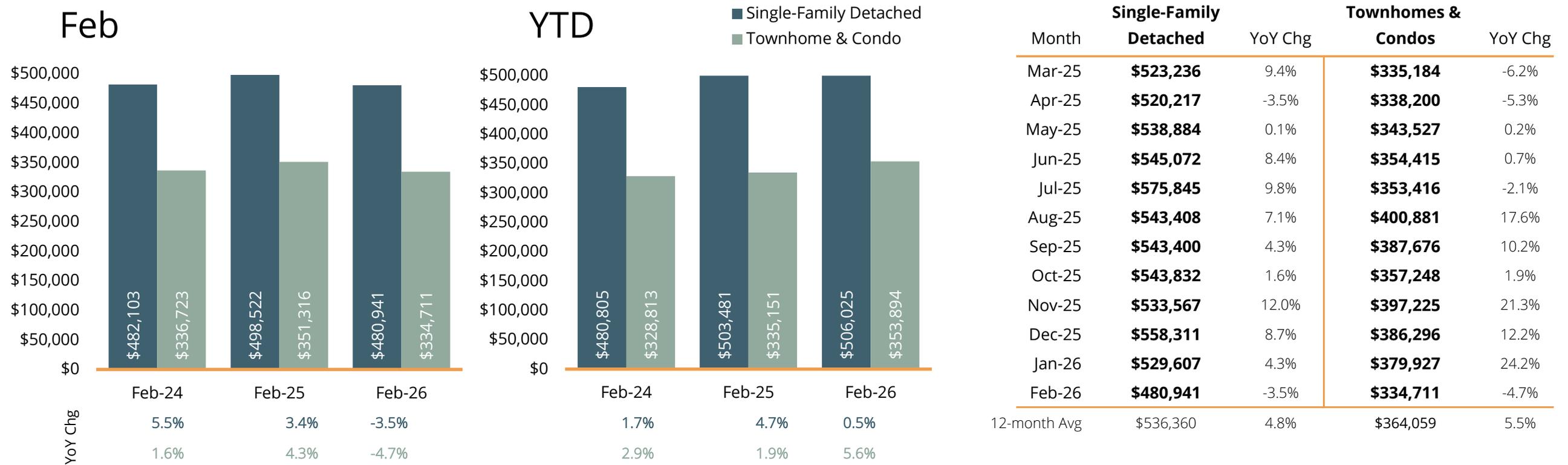
Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
Mar-25	\$526,176	10.5%	\$338,260	-5.8%
Apr-25	\$520,424	-2.9%	\$340,790	-4.2%
May-25	\$538,745	0.1%	\$344,370	0.6%
Jun-25	\$555,413	11.5%	\$344,370	-2.4%
Jul-25	\$578,227	11.0%	\$356,279	-1.5%
Aug-25	\$547,379	8.3%	\$404,529	18.9%
Sep-25	\$552,173	5.4%	\$398,532	13.0%
Oct-25	\$553,502	2.8%	\$364,076	2.8%
Nov-25	\$539,872	12.8%	\$399,240	20.6%
Dec-25	\$564,305	9.1%	\$390,420	12.9%
Jan-26	\$543,553	7.6%	\$387,954	25.0%
Feb-26	\$483,252	-3.4%	\$341,313	-3.4%
12-month Avg	\$541,919	5.9%	\$367,511	6.0%

Historical Average List Price by Month

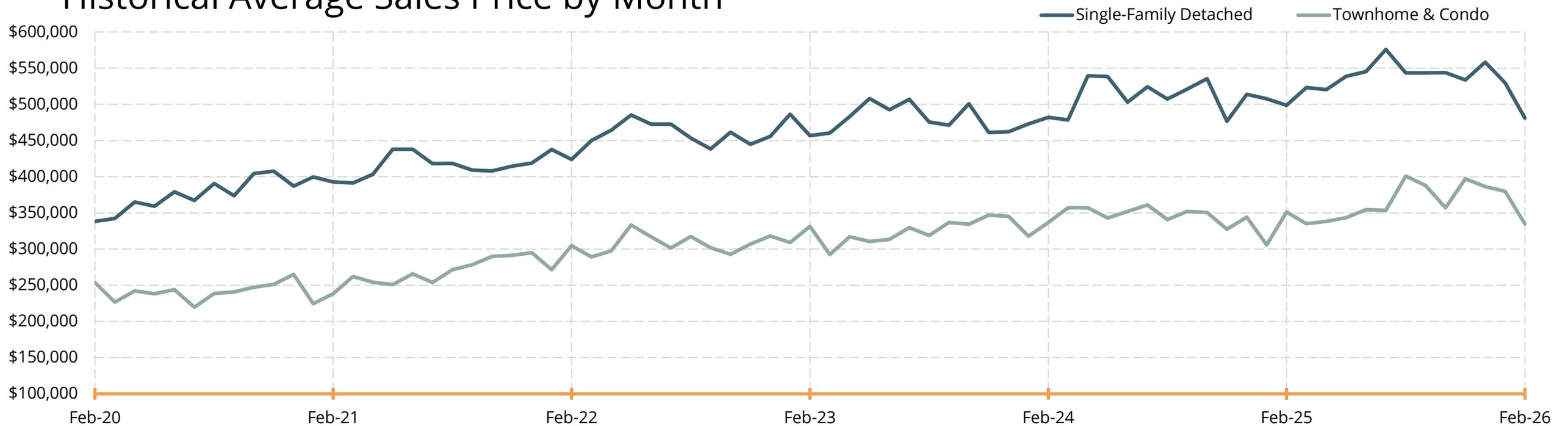


Source: Virginia REALTORS®, data accessed March 15, 2026

Average Sales Price

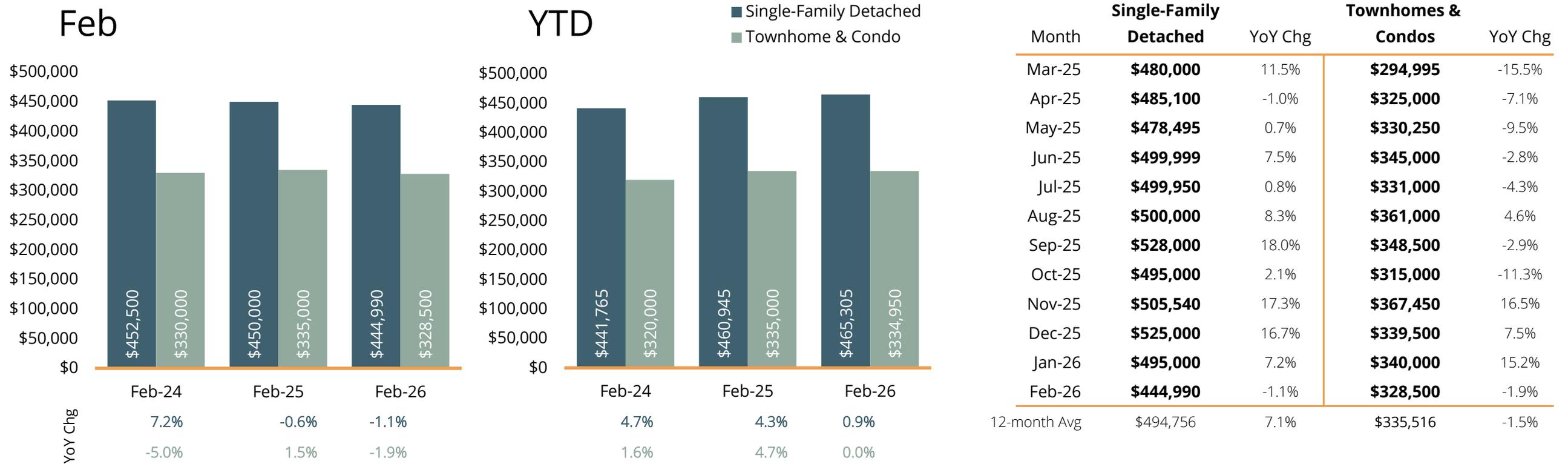


Historical Average Sales Price by Month

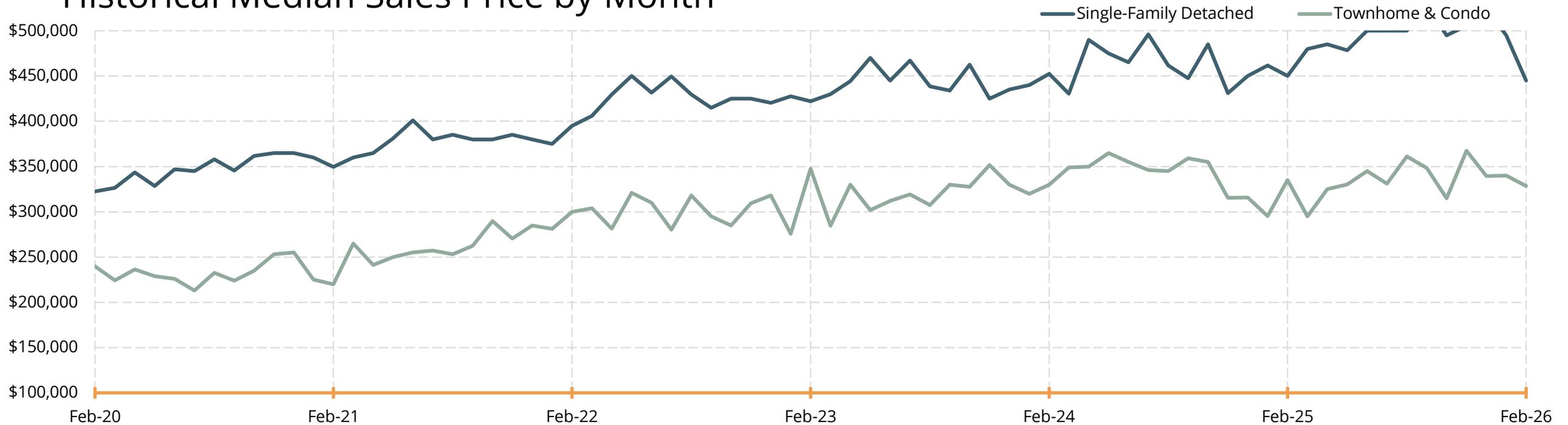


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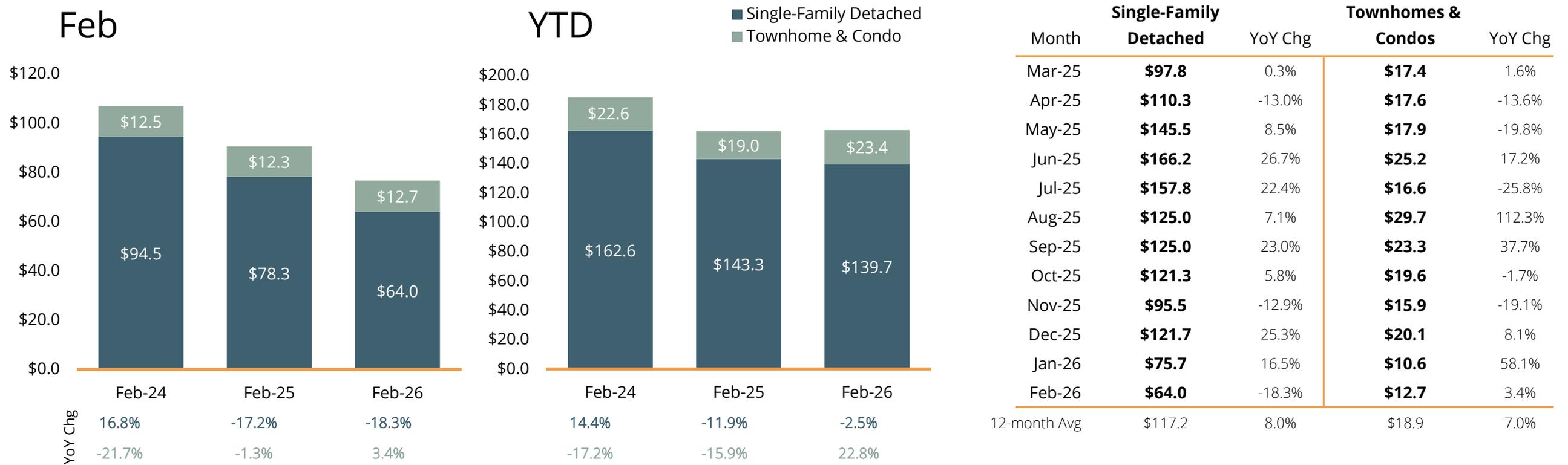
Median Sales Price



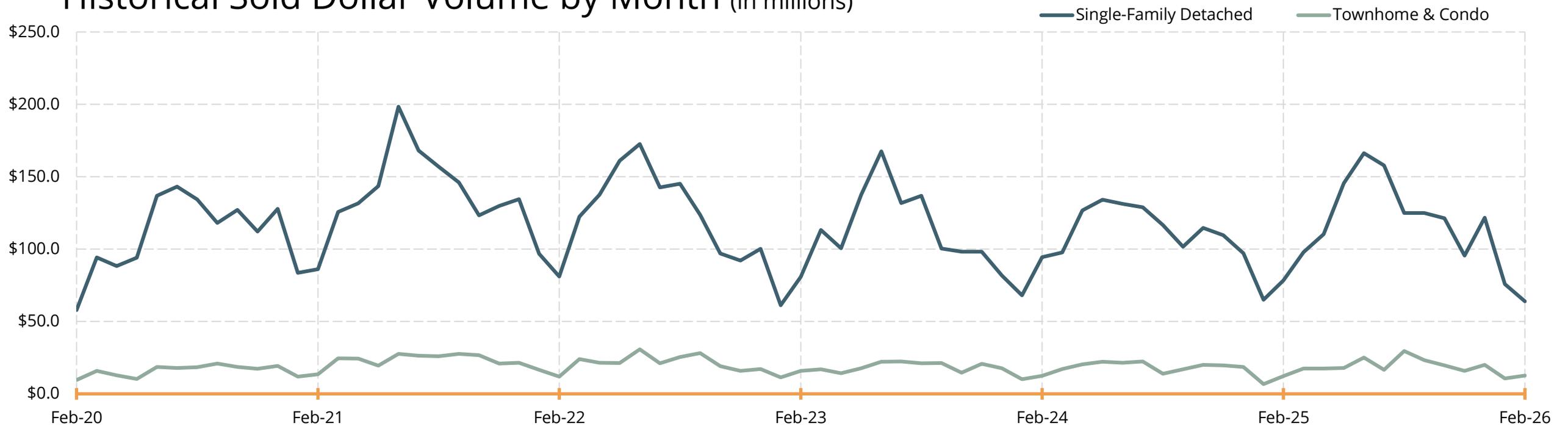
Historical Median Sales Price by Month



Sold Dollar Volume (in millions)

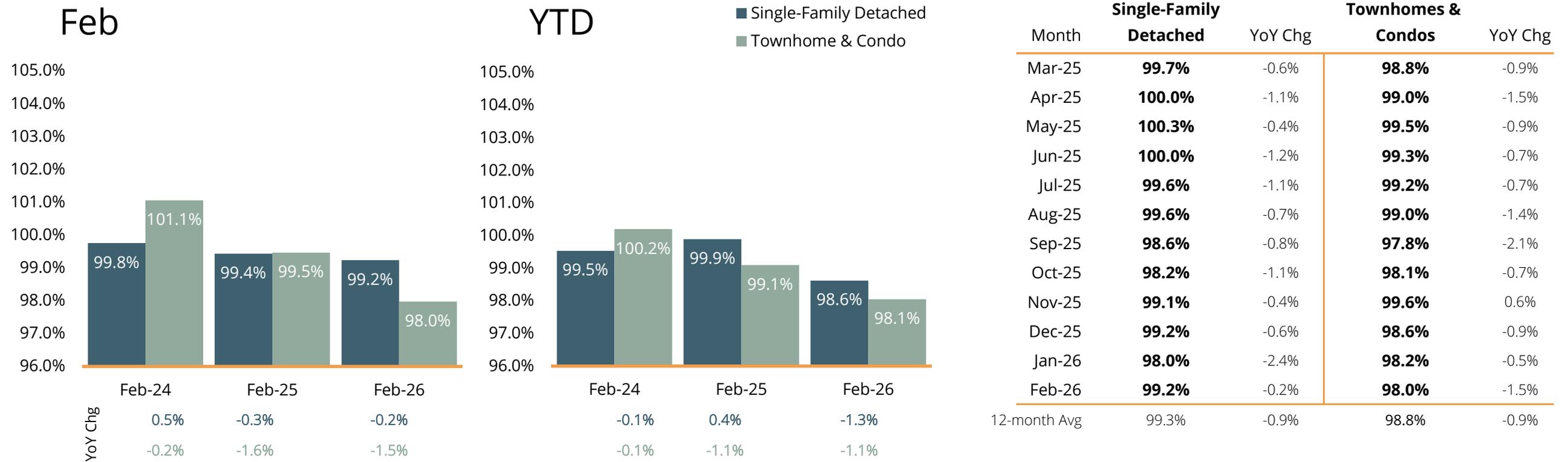


Historical Sold Dollar Volume by Month (in millions)

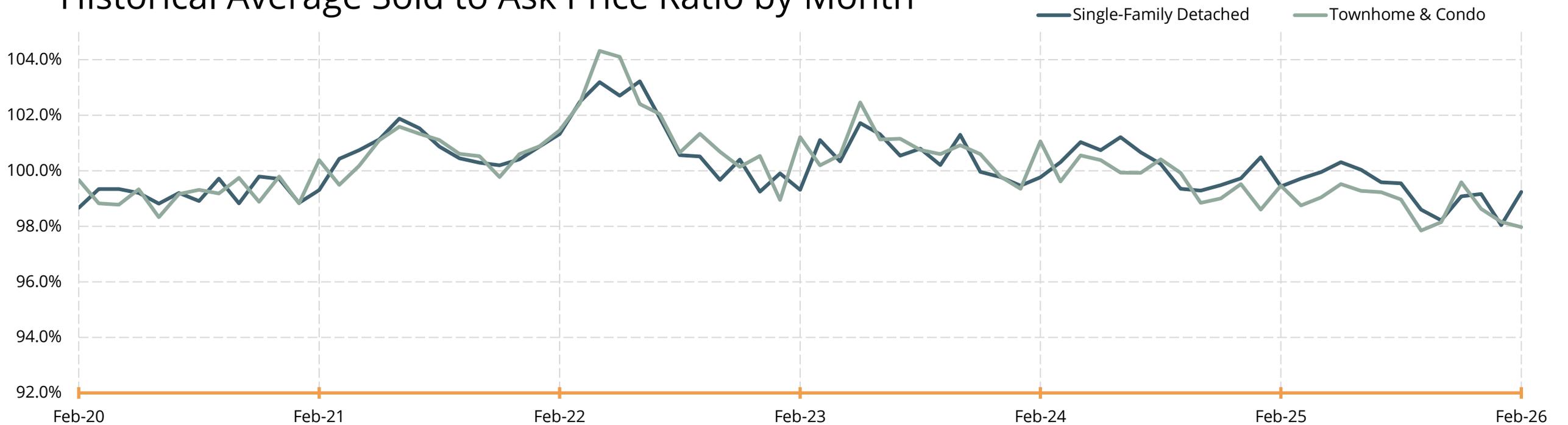


Source: Virginia REALTORS®, data accessed March 15, 2026

Average Sold to Ask Price Ratio

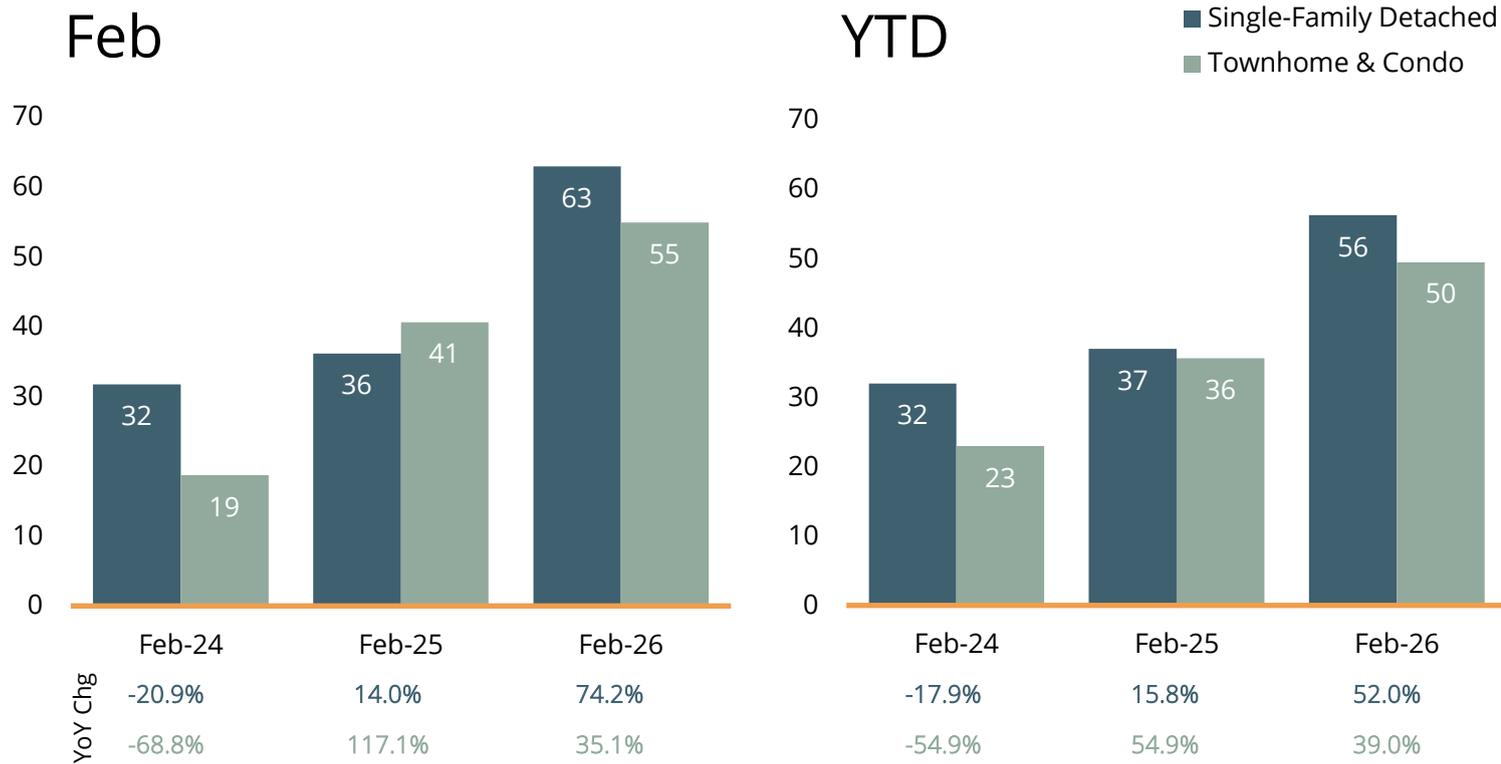


Historical Average Sold to Ask Price Ratio by Month



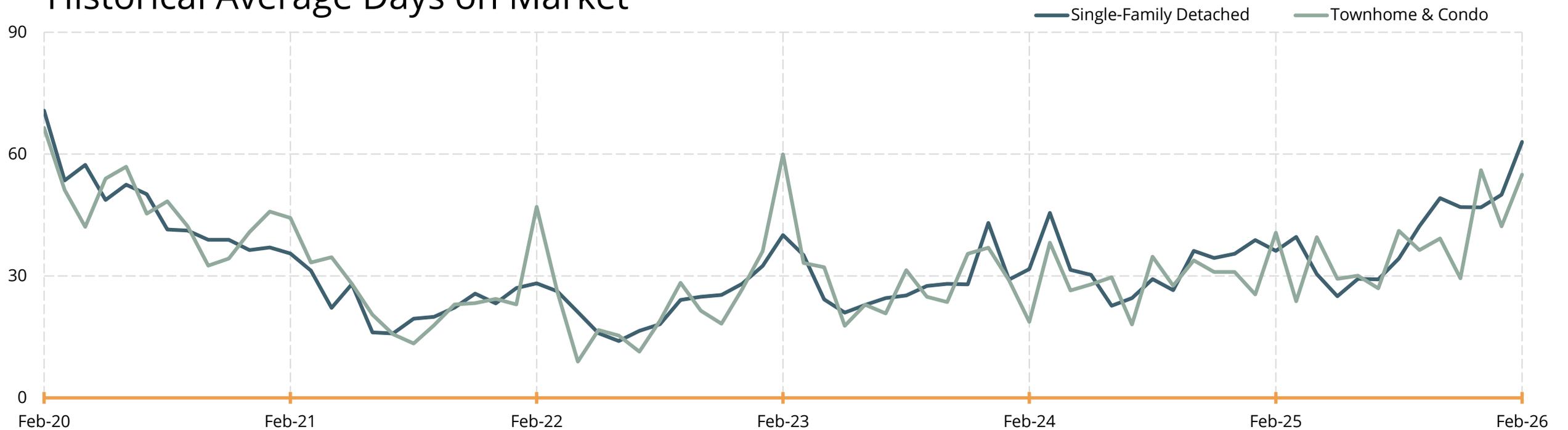
Source: Virginia REALTORS®, data accessed March 15, 2026

Average Days on Market



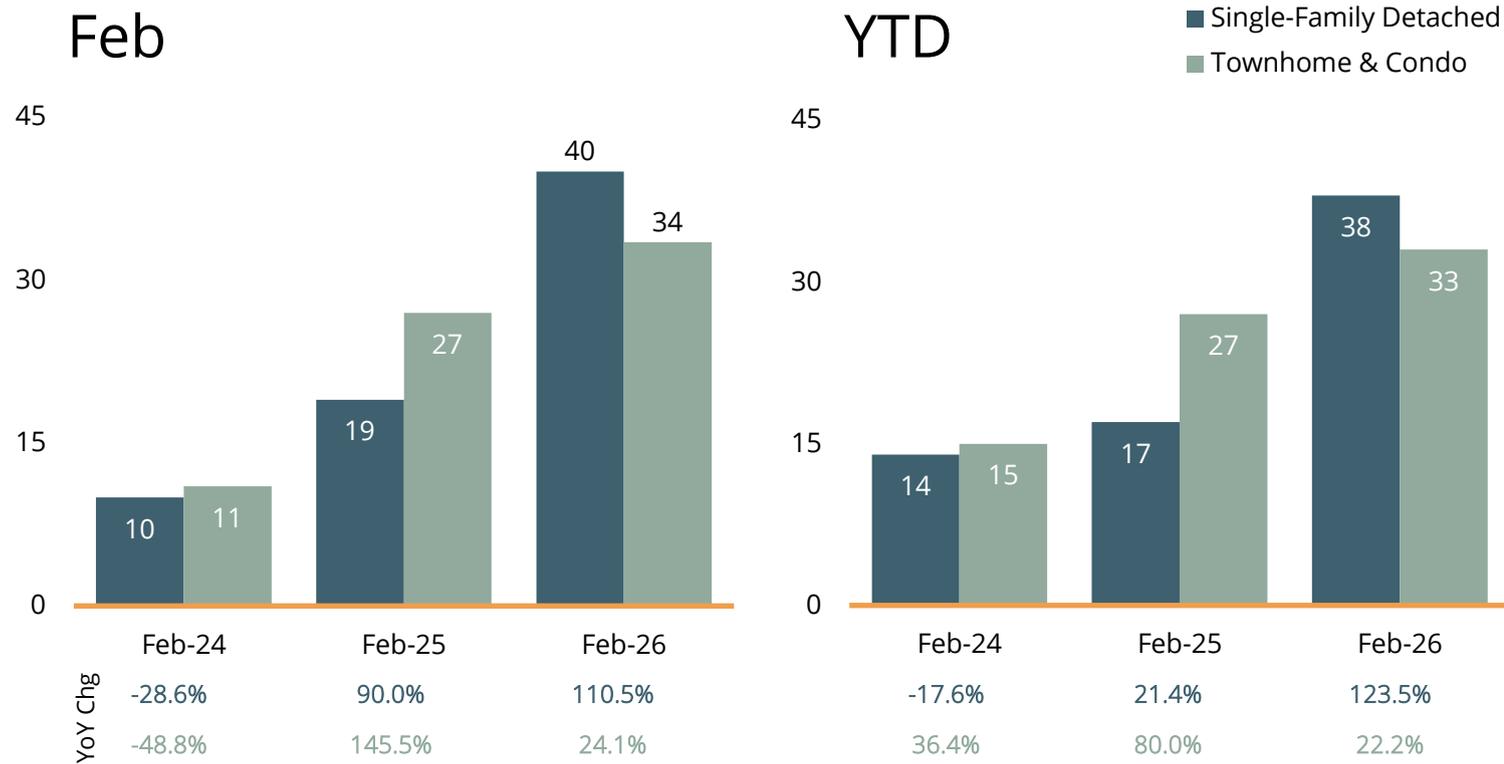
Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
Mar-25	40	-13.0%	24	-37.7%
Apr-25	30	-3.1%	40	49.5%
May-25	25	-17.5%	29	5.0%
Jun-25	29	29.1%	30	1.3%
Jul-25	29	18.7%	27	49.1%
Aug-25	34	17.1%	41	18.4%
Sep-25	42	59.4%	36	31.8%
Oct-25	49	35.9%	39	15.9%
Nov-25	47	36.3%	29	-5.1%
Dec-25	47	32.1%	56	81.1%
Jan-26	50	28.7%	42	65.5%
Feb-26	63	74.2%	55	35.1%
12-month Avg	41	24.2%	37	23.1%

Historical Average Days on Market



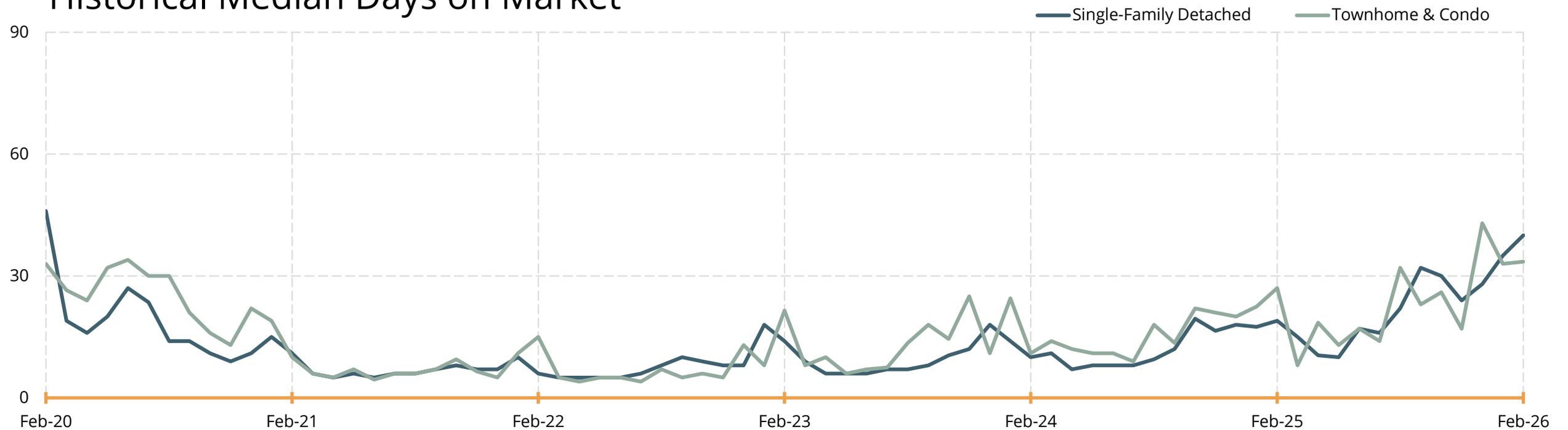
Source: Virginia REALTORS®, data accessed March 15, 2026

Median Days on Market



Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
Mar-25	15	36.4%	8	-42.9%
Apr-25	11	50.0%	19	54.2%
May-25	10	25.0%	13	18.2%
Jun-25	17	112.5%	17	54.5%
Jul-25	16	100.0%	14	55.6%
Aug-25	22	131.6%	32	77.8%
Sep-25	32	166.7%	23	70.4%
Oct-25	30	53.8%	26	18.2%
Nov-25	24	45.5%	17	-19.0%
Dec-25	28	55.6%	43	115.0%
Jan-26	35	100.0%	33	46.7%
Feb-26	40	110.5%	34	24.1%
12-month Avg	23	81.5%	23	38.3%

Historical Median Days on Market

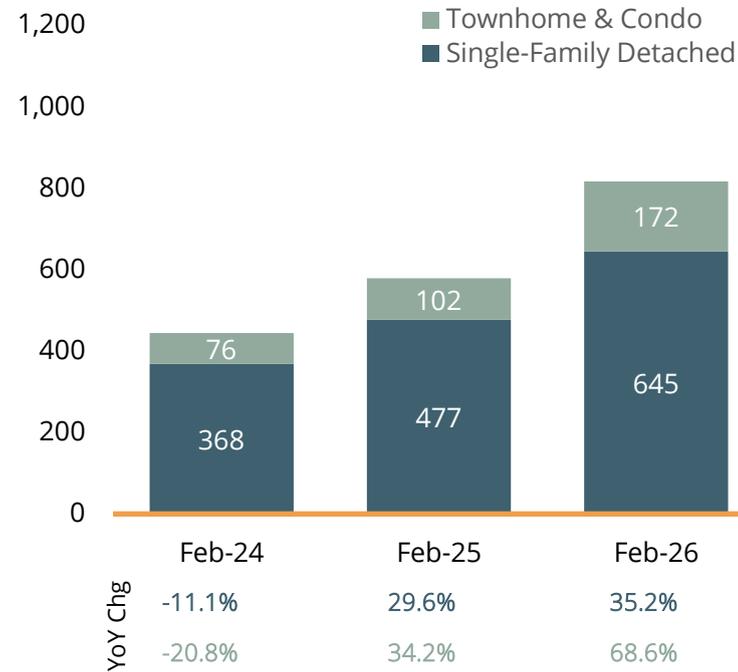


Source: Virginia REALTORS®, data accessed March 15, 2026

Active Listings

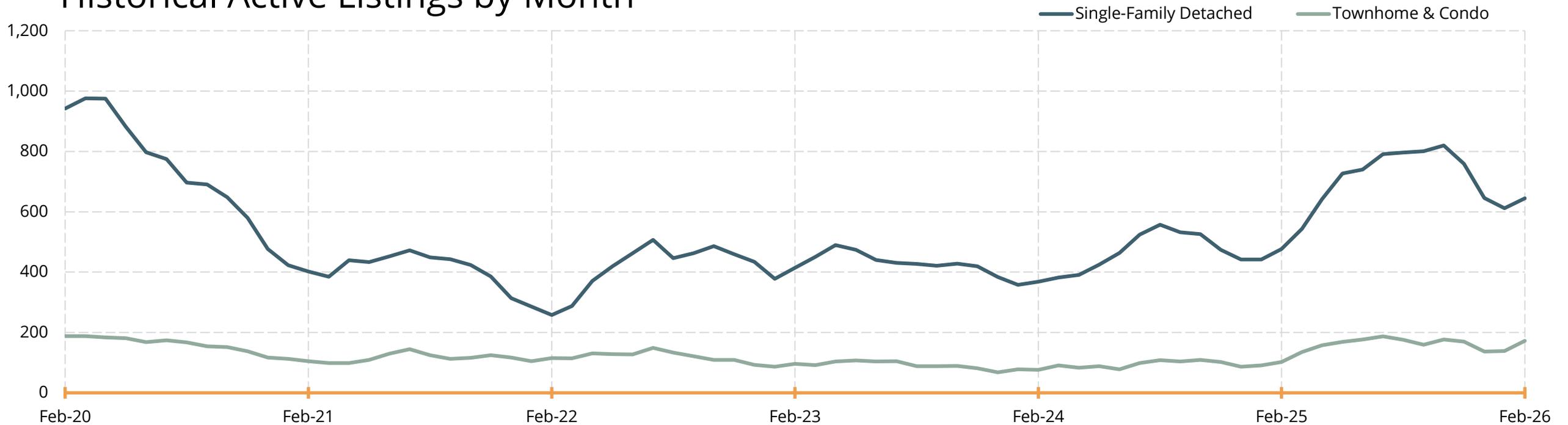


Feb



Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
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%
Jan-26	612	38.5%	139	52.7%
Feb-26	645	35.2%	172	68.6%
12-month Avg	710	51.2%	163	71.3%

Historical Active Listings by Month

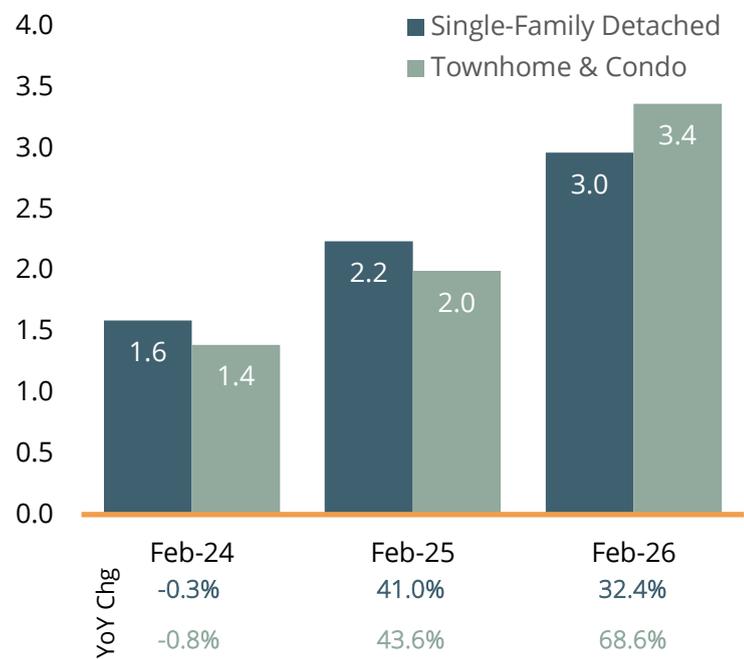


Source: Virginia REALTORS®, data accessed March 15, 2026

Months of Supply

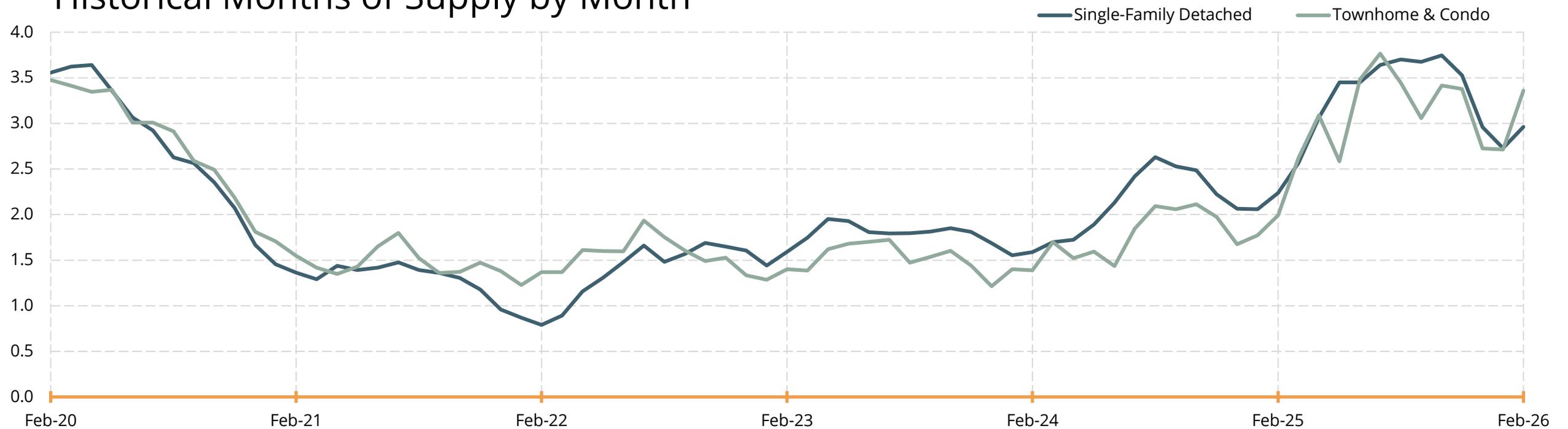


Feb



Month	Single-Family		Townhomes & Condos	
	Detached	YoY Chg	Condos	YoY Chg
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%
Jan-26	2.7	32.5%	2.7	53.1%
Feb-26	3.0	32.4%	3.4	68.6%
12-month Avg	3.3	51.3%	3.1	72.8%

Historical Months of Supply by Month



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

Area Overview - Total Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg
James City County	163	177	8.6%	89	77	-13.5%	\$474,772	\$472,186	-0.5%	\$395,000	\$440,000	11.4%	261	379	45.2%	2.1	3.1	45.2%
Williamsburg	21	32	52.4%	10	6	-40.0%	\$471,700	\$361,500	-23.4%	\$434,000	\$360,000	-17.1%	45	69	53.3%	2.7	4.2	58.1%
York County	53	82	54.7%	58	58	0.0%	\$490,613	\$410,196	-16.4%	\$458,815	\$395,581	-13.8%	135	195	44.4%	1.7	2.4	38.8%
New Kent County	54	75	38.9%	33	28	-15.2%	\$441,342	\$469,304	6.3%	\$382,500	\$400,000	4.6%	133	164	23.3%	3.3	3.8	14.2%
Charles City County	3	7	133.3%	2	2	0.0%	\$286,250	\$612,500	114.0%	\$286,250	\$612,500	114.0%	5	10	100.0%	1.0	2.6	165.2%

Area Overview - Total Market YTD



Geography	New Listings YTD			Sales YTD			Average Sales Price TYD			Median Sales Price TYD			Active Listings YTD		
	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg
James City County	279	317	13.6%	155	148	-4.5%	\$487,348	\$503,384	3.3%	\$424,900	\$462,500	8.8%	261	379	45.2%
Williamsburg	41	45	9.8%	15	24	60.0%	\$448,714	\$431,328	-3.9%	\$434,000	\$379,000	-12.7%	45	69	53.3%
York County	120	164	36.7%	115	107	-7.0%	\$484,898	\$439,209	-9.4%	\$447,230	\$400,200	-10.5%	135	195	44.4%
New Kent County	121	143	18.2%	54	58	7.4%	\$445,500	\$501,115	12.5%	\$395,000	\$430,000	8.9%	133	164	23.3%
Charles City County	4	13	225.0%	3	5	66.7%	\$283,500	\$434,800	53.4%	\$278,000	\$306,000	10.1%	5	10	100.0%

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg
James City County	134	135	0.7%	71	57	-19.7%	\$508,529	\$518,130	1.9%	\$432,000	\$465,900	7.8%	202	280	38.6%	2.0	2.9	40.9%
Williamsburg	12	22	83.3%	8	3	-62.5%	\$481,125	\$440,000	-8.5%	\$434,000	\$410,000	-5.5%	30	39	30.0%	2.9	3.6	25.0%
York County	45	60	33.3%	50	44	-12.0%	\$510,524	\$433,278	-15.1%	\$491,988	\$428,000	-13.0%	118	159	34.7%	1.9	2.4	28.3%
New Kent County	50	68	36.0%	26	27	3.8%	\$469,799	\$474,908	1.1%	\$448,725	\$400,000	-10.9%	122	157	28.7%	3.4	4.0	16.3%
Charles City County	3	7	133.3%	2	2	0.0%	\$286,250	\$612,500	114.0%	\$286,250	\$612,500	114.0%	5	10	100.0%	1.0	2.6	165.2%

Area Overview - Single Family Detached Market YTD



Geography	New Listings YTD			Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg
James City County	229	234	2.2%	127	114	-10.2%	\$518,982	\$544,636	4.9%	\$457,750	\$485,000	6.0%	202	280	38.6%
Williamsburg	28	27	-3.6%	10	14	40.0%	\$508,778	\$467,649	-8.1%	\$470,000	\$411,000	-12.6%	30	39	30.0%
York County	102	132	29.4%	99	86	-13.1%	\$508,105	\$466,812	-8.1%	\$483,000	\$455,000	-5.8%	118	159	34.7%
New Kent County	108	135	25.0%	46	57	23.9%	\$464,916	\$504,327	8.5%	\$409,990	\$440,000	7.3%	122	157	28.7%
Charles City County	4	13	225.0%	3	5	66.7%	\$283,500	\$434,800	53.4%	\$278,000	\$306,000	10.1%	5	10	100.0%

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg
James City County	29	42	44.8%	18	20	11.1%	\$6,149,180	\$341,246	-94.5%	\$346,495	\$303,000	-12.6%	59	99	67.8%	2.3	3.7	58.0%
Williamsburg	9	10	11.1%	2	3	50.0%	\$868,000	\$283,000	-67.4%	\$434,000	\$350,000	-19.4%	15	30	100.0%	2.4	5.5	133.8%
York County	8	22	175.0%	8	14	75.0%	\$2,929,390	\$337,650	-88.5%	\$348,000	\$343,550	-1.3%	17	36	111.8%	1.1	2.3	111.8%
New Kent County	4	7	75.0%	7	1	-85.7%	\$2,349,500	\$318,000	-86.5%	\$332,040	\$318,000	-4.2%	11	7	-36.4%	2.8	2.2	-23.3%
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



Geography	New Listings YTD			Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg	Feb-25	Feb-26	% chg
James City County	50	83	66.0%	28	34	21.4%	\$339,721	\$365,067	7.5%	\$357,990	\$324,500	-9.4%	59	99	67.8%
Williamsburg	13	18	38.5%	5	10	100.0%	\$340,600	\$380,477	11.7%	\$423,000	\$371,500	-12.2%	15	30	100.0%
York County	18	32	77.8%	16	21	31.3%	\$327,092	\$324,853	-0.7%	\$335,000	\$328,000	-2.1%	17	36	111.8%
New Kent County	13	8	-38.5%	8	1	-87.5%	\$331,430	\$318,000	-4.1%	\$327,090	\$318,000	-2.8%	11	7	-36.4%
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.

All inquiries regarding this report may be directed to:

Robin Spensieri

Virginia REALTORS® Vice President of Communications and Media Relations

rspensieri@virginiarealtors.org

804-622-7954

Data and analysis provided by Virginia REALTORS® Research Team

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