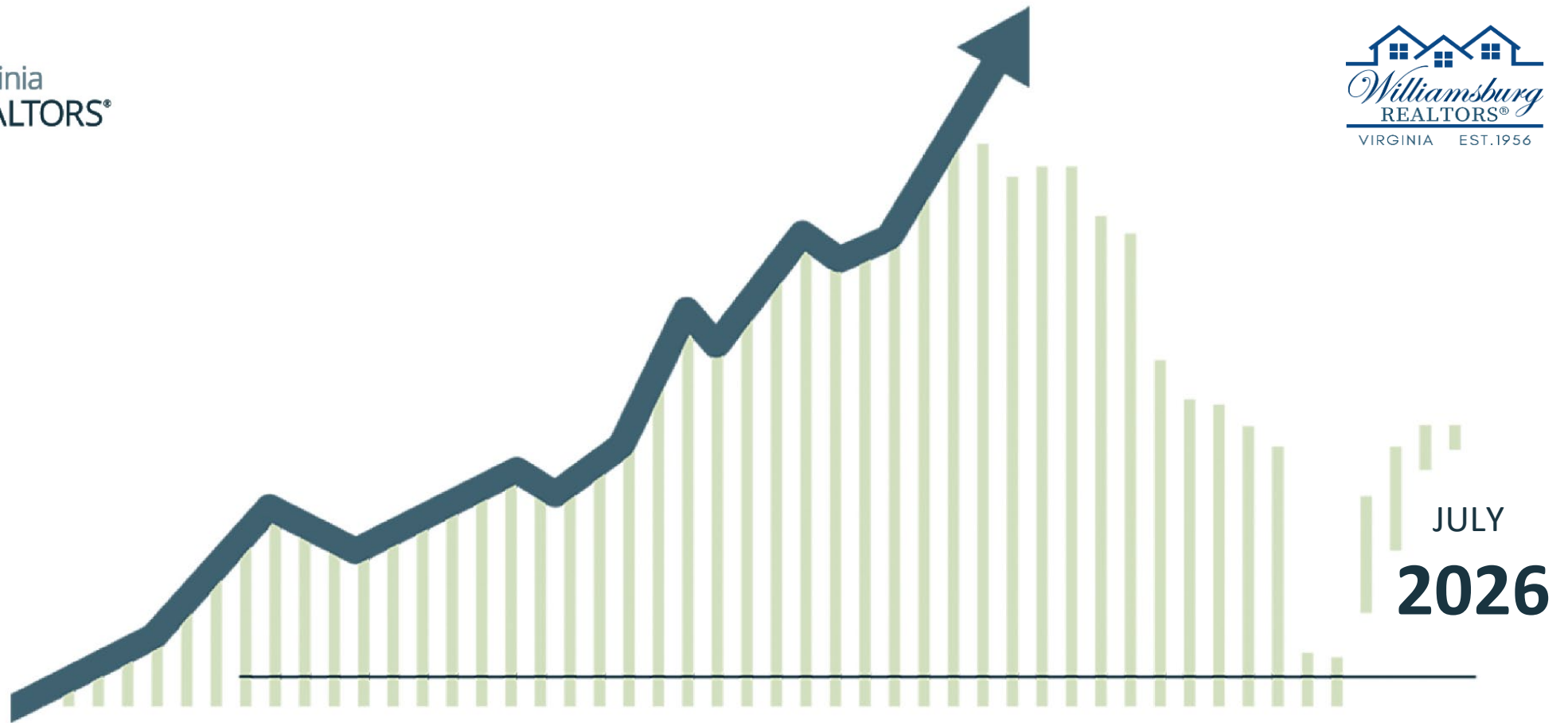




WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

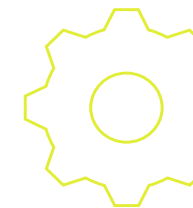
CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

WAAR Market Indicators Report



Key Market Trends: July 2026

- For the fifth consecutive month, sales increased in the WAAR market.** There were 361 total sales this month, up 12.5% from the previous year, which is 40 additional sales. Most local markets experienced an uptick in sales this month. Activity fell 7.4% in New Kent County, which had four fewer sales compared to the same time last year. The markets with the sharpest rise in sales were Williamsburg, with 21 more than last July (+300.0%) and James City County with 18 additional home sales (+11.8%).
- Regionwide, pending sales continued to climb in the month of July.** Activity in the WAAR area went up 3.8% leading to 248 pending sales, nine more than the year prior. James City County had five more pending sales than a year ago (+4.5%) as Williamsburg experienced its fourth consecutive month of growth with 10 additional pending sales (+90.9%). There was a dip in activity in York County which had eight fewer pending sales compared to the same time last July (-11.9%).
- Home prices climbed in most parts of the WAAR footprint this month.** At \$479,000, the median sales price increased 2.1% from the year before, a \$10,000 price gain. In York County homes sold for \$517,500 in July, \$77,338 more than the previous year, jumping 17.6%. There was a significant median price drop in Williamsburg (-43.1%) while James City County experienced a smaller dip (-3.6%). The median price in York County rose sharply (+17.6%).
- Active listings have been growing for the last two years across the WAAR footprint.** July ended with 1,101 listings in the area, 123 more than the year prior, a 12.6% rise in activity. Listings went up the most in James City County with 73 more than last year (+14.9%) and New Kent County with 43 additional listings (+28.1%). Charles City County experienced no change in the total number of active listings this month. After inching up last month, listings fell 16.9% in Williamsburg (-13 listings).



WAAR Market Dashboard

YoY Chg	Jul-26	Indicator
▲ 12.5%	361	Sales
▲ 3.8%	248	Pending Sales
▲ 20.5%	528	New Listings
▼ -2.5%	\$532,233	Average List Price
▼ -2.6%	\$529,311	Average Sales Price
▲ 2.1%	\$479,000	Median Sales Price
▼ -2.1%	\$222	Average Price Per Square Foot
▲ 9.6%	\$191.1	Sold Dollar Volume (in millions)
▼ -0.1%	99.5%	Average Sold/Ask Price Ratio
▲ 29.1%	37	Average Days on Market
▲ 31.3%	21	Median Days on Market
▲ 12.6%	1,101	Active Listings
▲ 4.9%	3.8	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.

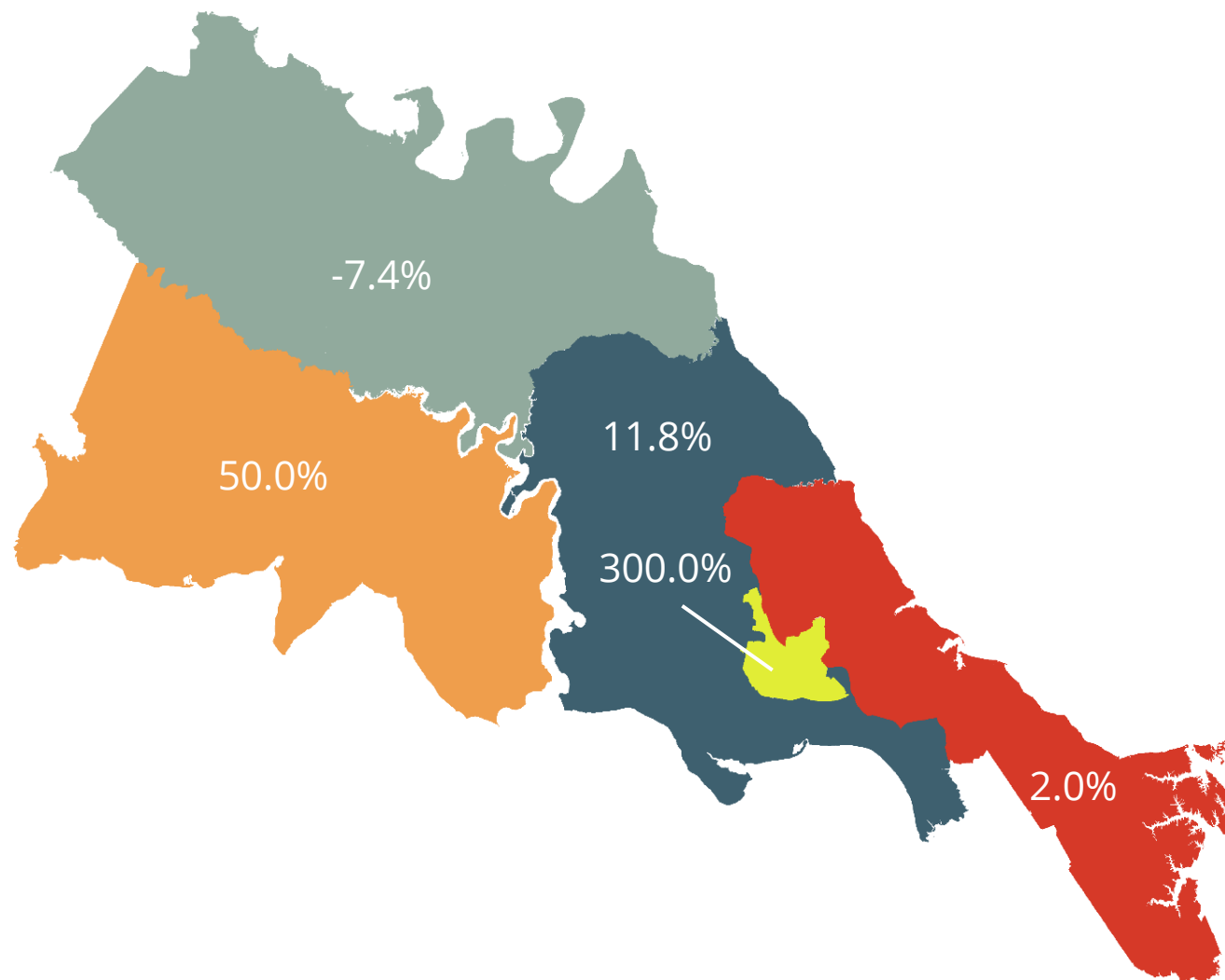
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



Jurisdiction	Total Sales		
	Jul-25	Jul-26	% Chg
Charles City County	6	9	50.0%
James City County	152	170	11.8%
New Kent County	54	50	-7.4%
Williamsburg	7	28	300.0%
York County	102	104	2.0%
WAAR	321	361	12.5%

Total Market Overview



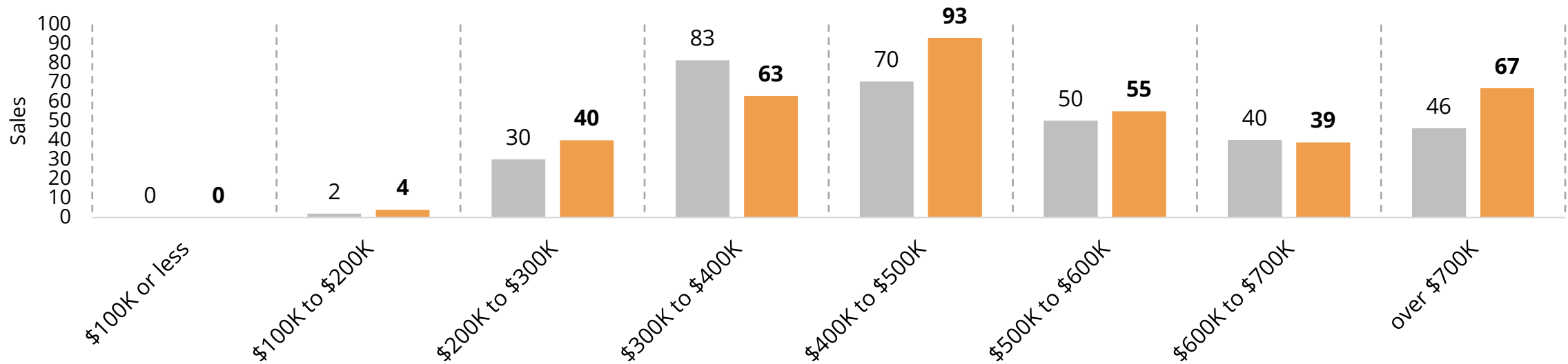
Key Metrics	2-year Trends	Jul-25	Jul-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Jul-24		Jul-26				
Sales		321	361	12.5%	1,864	2,117	13.6%
Pending Sales		239	248	3.8%	1,726	1,957	13.4%
New Listings		438	528	20.5%	2,821	3,286	16.5%
Average List Price		\$545,730	\$532,233	-2.5%	\$508,295	\$521,312	2.6%
Average Sales Price		\$543,278	\$529,311	-2.6%	\$505,399	\$518,459	2.6%
Median Sales Price		\$469,000	\$479,000	2.1%	\$452,500	\$471,699	4.2%
Average Price Per Square Foot		\$226	\$222	-2.1%	\$220	\$225	2.5%
Sold Dollar Volume (in millions)		\$174.4	\$191.1	9.6%	\$934.6	\$1,098.3	17.5%
Average Sold/Ask Price Ratio		99.5%	99.5%	-0.1%	99.8%	99.5%	-0.2%
Average Days on Market		29	37	29.1%	31	41	31.5%
Median Days on Market		16	21	31.3%	14	22	57.1%
Active Listings		978	1,101	12.6%	n/a	n/a	n/a
Months of Supply		3.6	3.8	4.9%	n/a	n/a	n/a

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

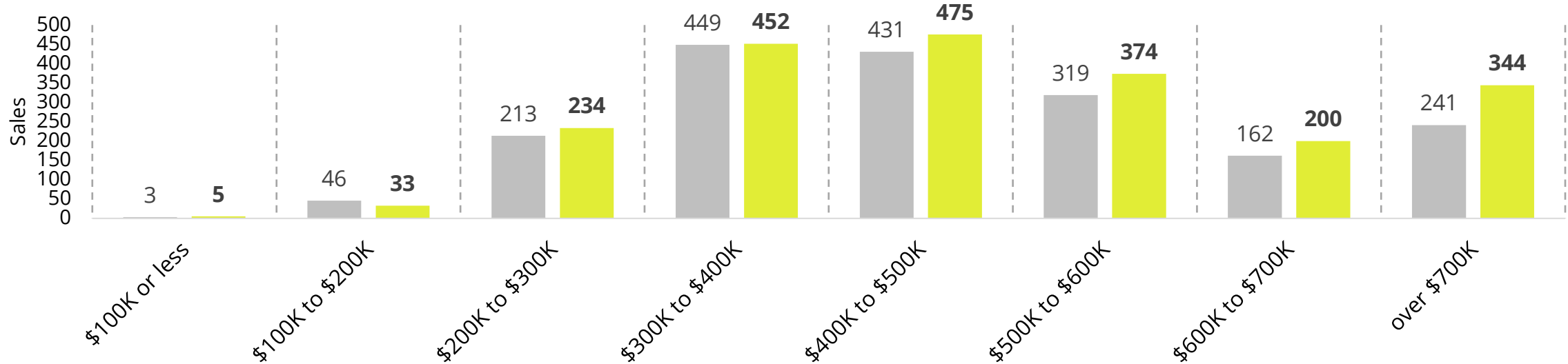
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Single-Family Detached Market Overview



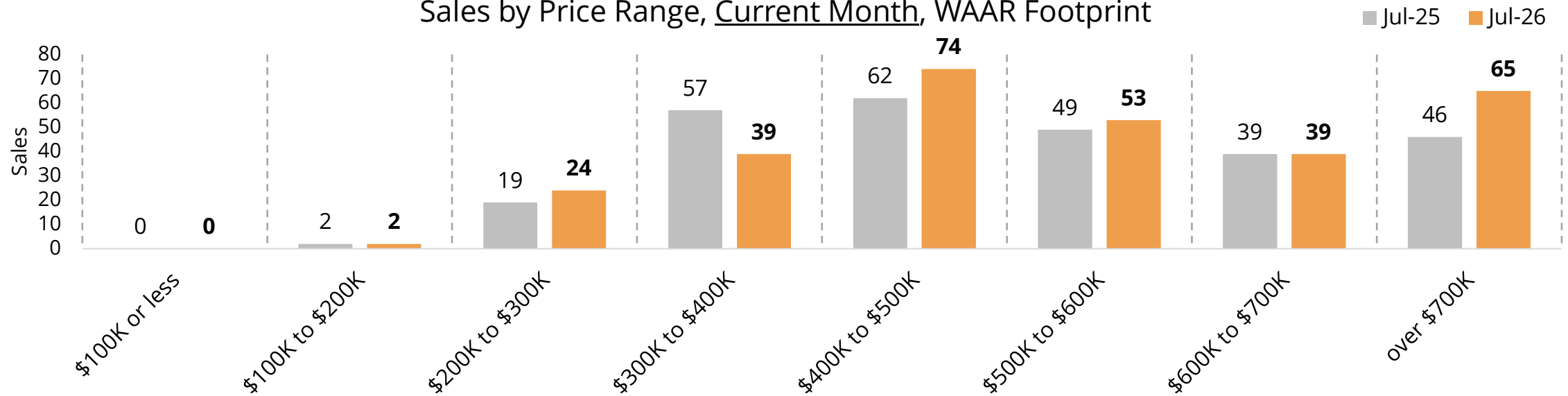
Key Metrics	2-year Trends	Jul-25	Jul-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Jul-24						
Sales		274	296	8.0%	1,533	1,730	12.9%
Pending Sales		211	212	0.5%	1,464	1,655	13.0%
New Listings		370	437	18.1%	2,344	2,680	14.3%
Average List Price		\$578,227	\$566,434	-2.0%	\$542,369	\$554,733	2.3%
Average Sales Price		\$575,845	\$563,251	-2.2%	\$539,417	\$551,837	2.3%
Median Sales Price		\$499,950	\$520,000	4.0%	\$485,000	\$505,000	4.1%
Average Price Per Square Foot		\$228	\$224	-1.8%	\$222	\$227	2.4%
Sold Dollar Volume (in millions)		\$157.8	\$166.7	5.7%	\$820.9	\$955.5	16.4%
Average Sold/Ask Price Ratio		99.6%	99.5%	-0.1%	99.9%	99.6%	-0.3%
Average Days on Market		29	38	30.8%	31	41	31.5%
Median Days on Market		16	21	31.3%	14	21	50.0%
Active Listings		791	886	12.0%	n/a	n/a	n/a
Months of Supply		3.6	3.8	3.9%	n/a	n/a	n/a

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

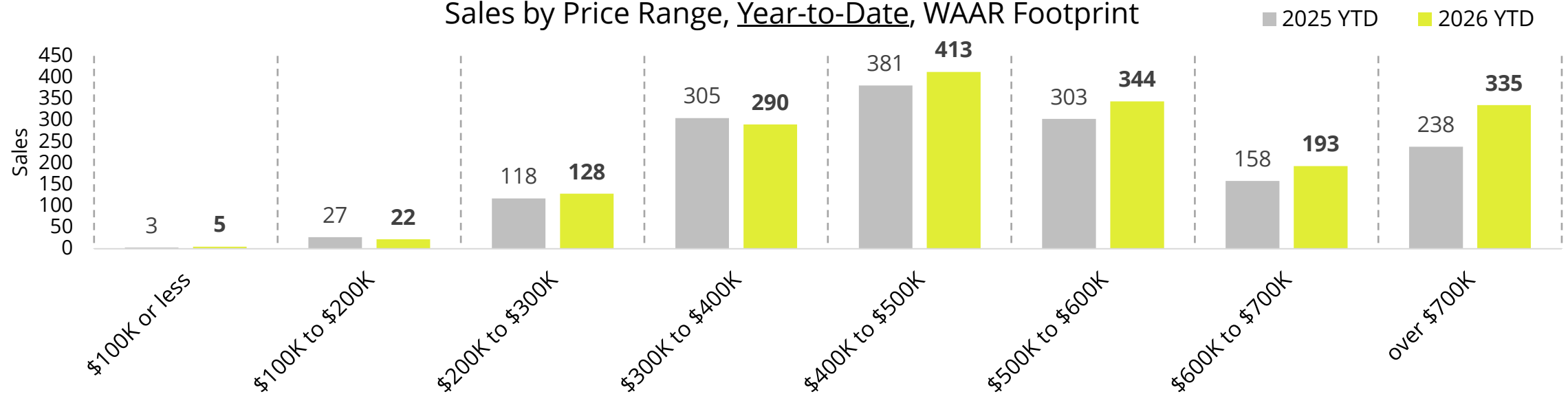
Single-Family Detached Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Townhome & Condo Market Overview



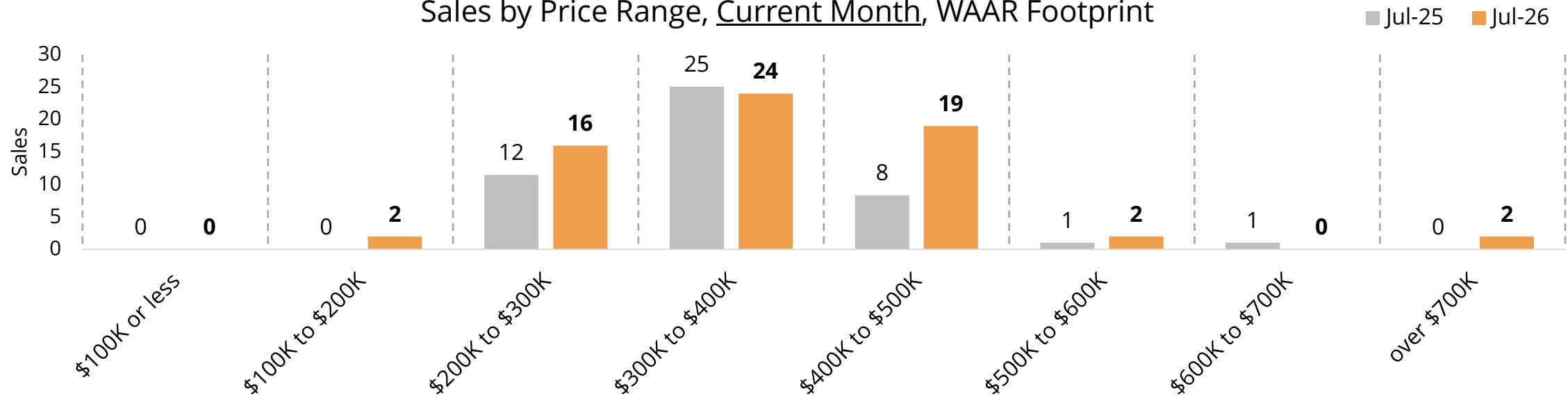
Key Metrics	2-year Trends	Jul-25	Jul-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Jul-24						
Sales		47	65	38.3%	331	387	16.9%
Pending Sales		28	36	28.6%	262	302	15.3%
New Listings		68	91	33.8%	477	606	27.0%
Average List Price		\$356,279	\$376,483	5.7%	\$346,044	\$371,437	7.3%
Average Sales Price		\$353,416	\$374,755	6.0%	\$343,417	\$368,772	7.4%
Median Sales Price		\$331,000	\$369,950	11.8%	\$332,040	\$350,000	5.4%
Average Price Per Square Foot		\$210	\$203	-3.1%	\$204	\$214	4.7%
Sold Dollar Volume (in millions)		\$16.6	\$24.4	46.6%	\$113.7	\$142.8	25.6%
Average Sold/Ask Price Ratio		99.2%	99.4%	0.1%	99.1%	99.2%	0.1%
Average Days on Market		27	33	22.8%	31	41	31.4%
Median Days on Market		14	20	42.9%	16	25	56.3%
Active Listings		187	215	15.0%	n/a	n/a	n/a
Months of Supply		3.5	3.9	9.5%	n/a	n/a	n/a

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

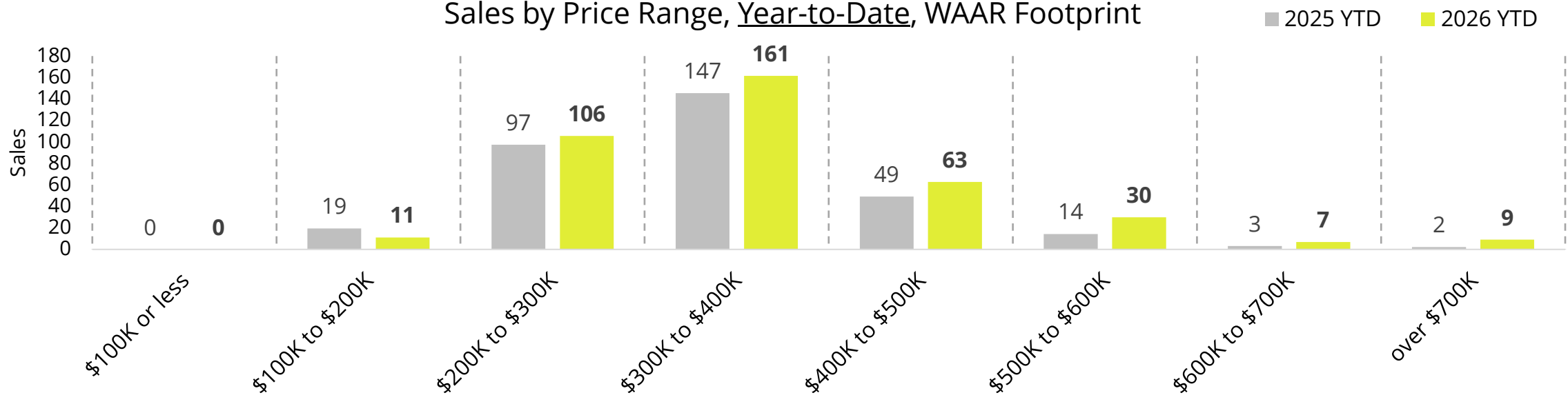
Townhome & Condo Market by Price Range



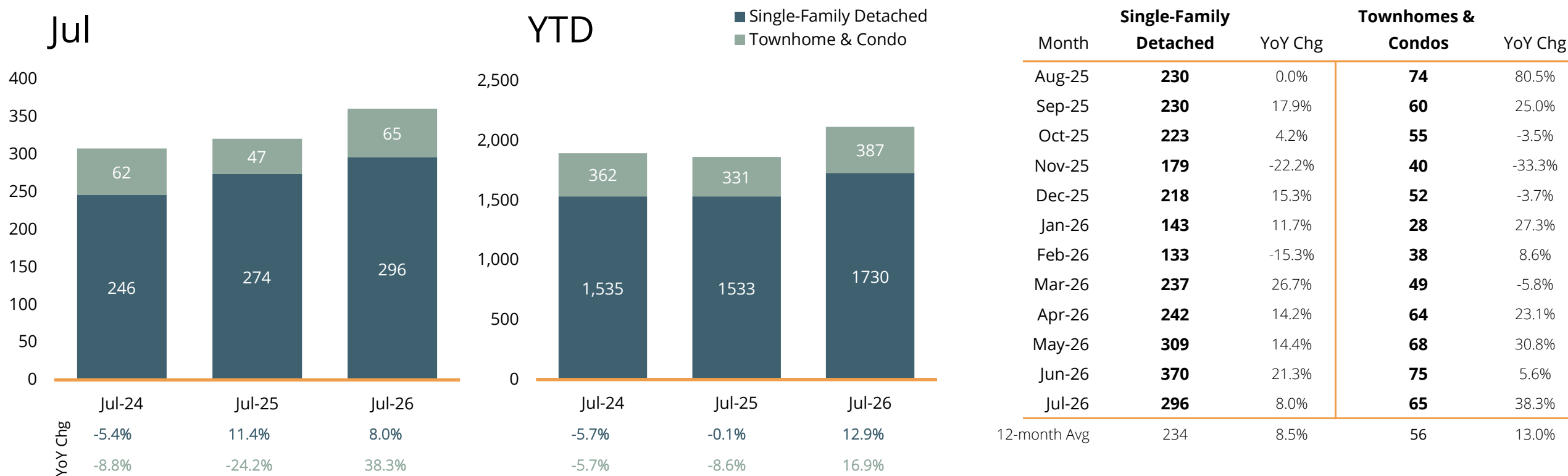
Sales by Price Range, Current Month, WAAR Footprint



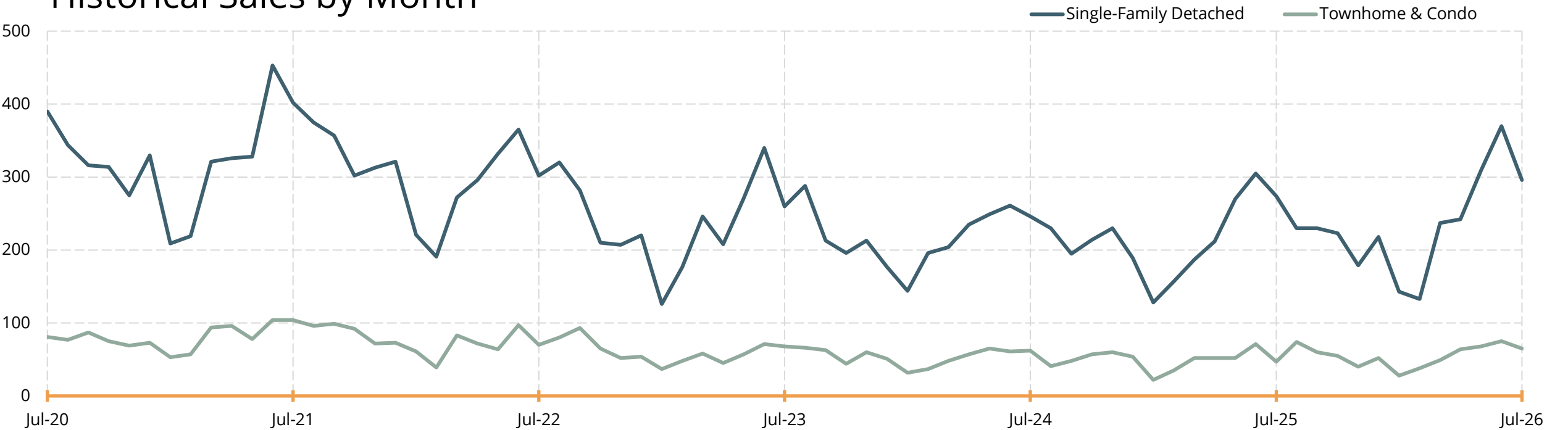
Sales by Price Range, Year-to-Date, WAAR Footprint



Sales

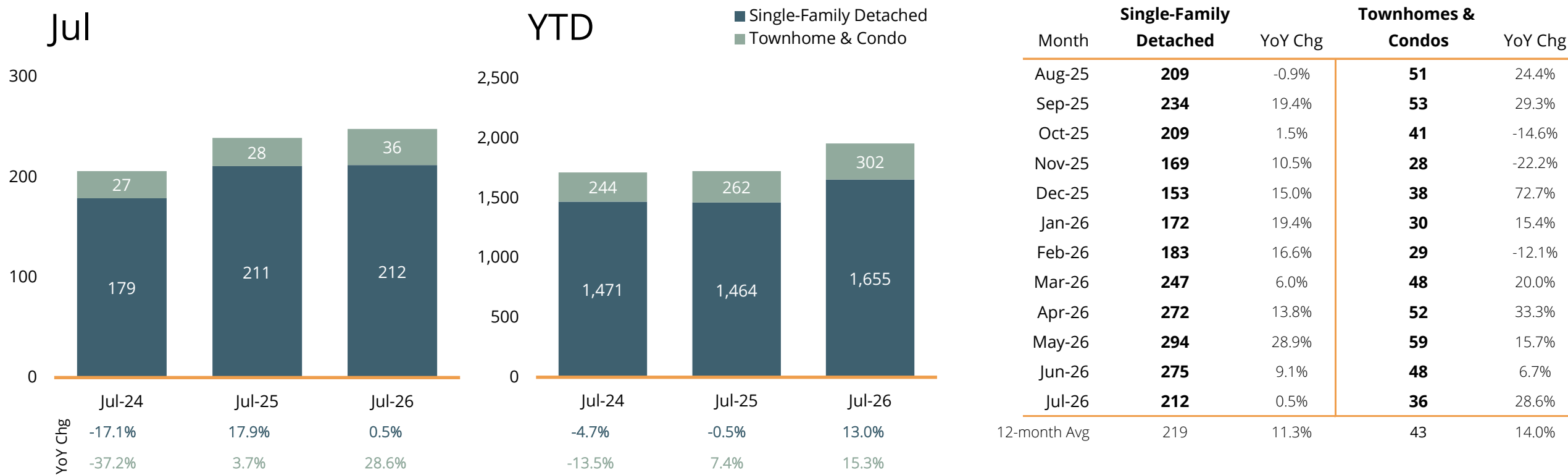


Historical Sales by Month

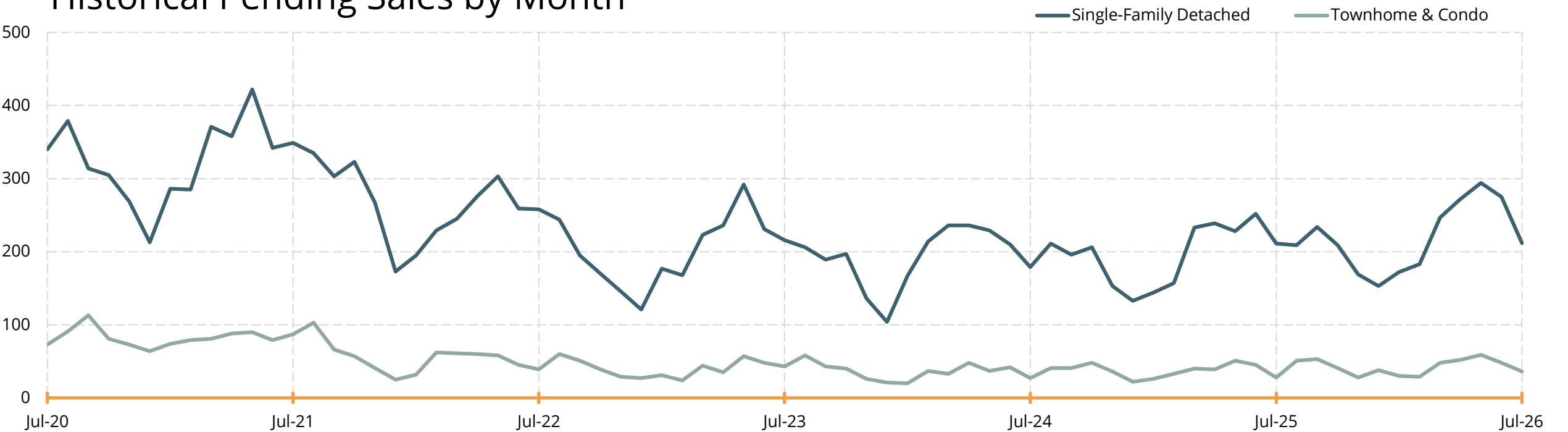


Source: Virginia REALTORS®, data accessed August 15, 2026

Pending Sales

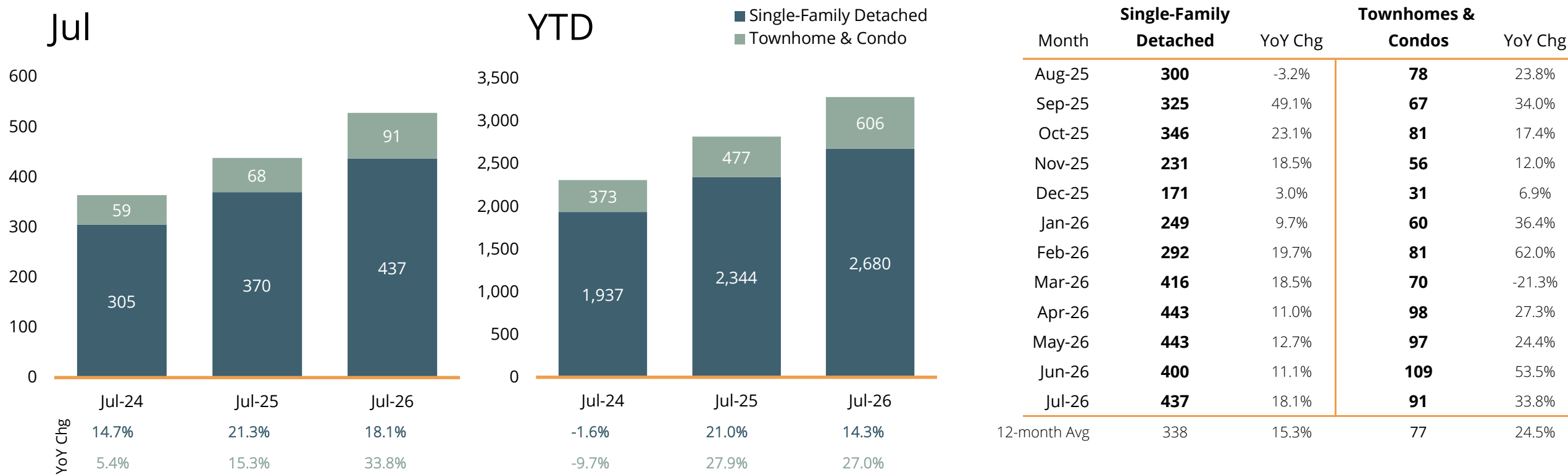


Historical Pending Sales by Month

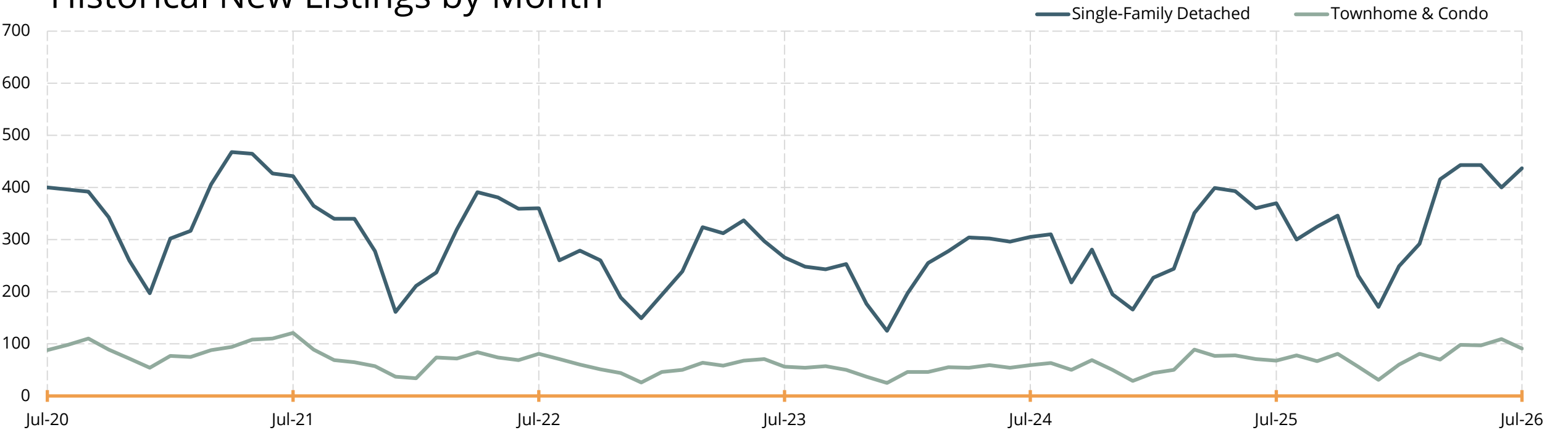


Source: Virginia REALTORS®, data accessed August 15, 2026

New Listings

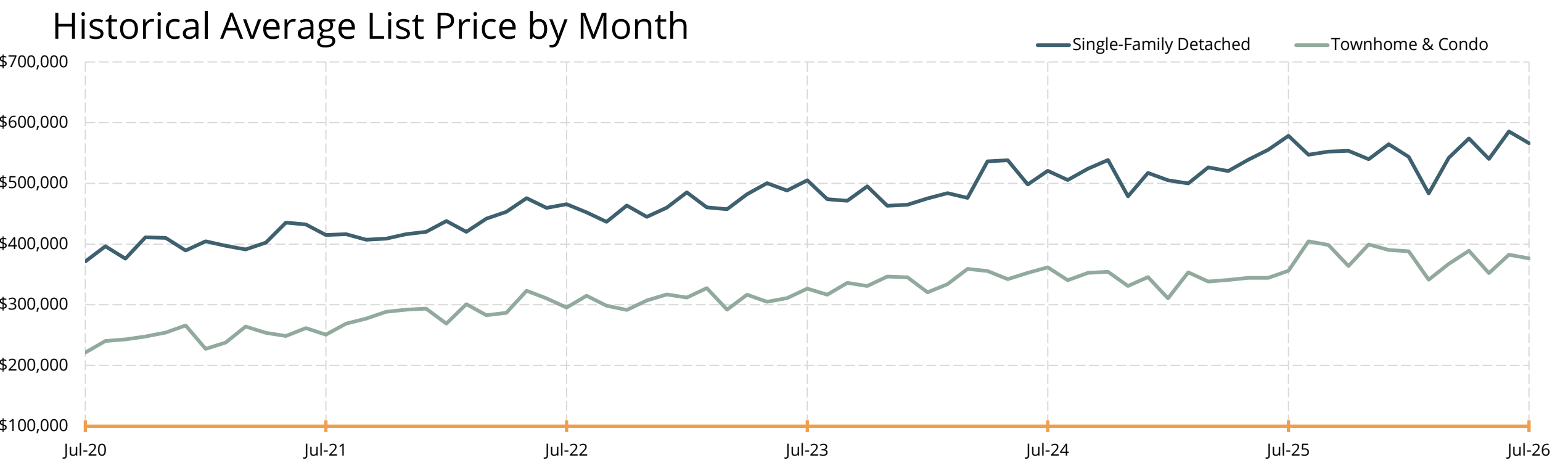
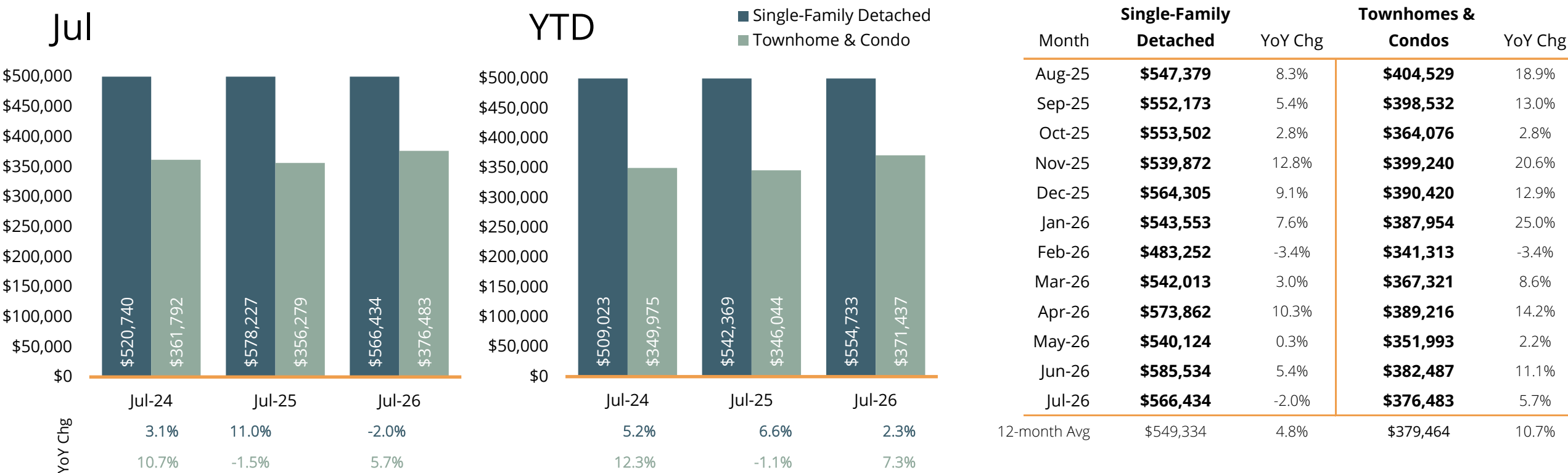


Historical New Listings by Month

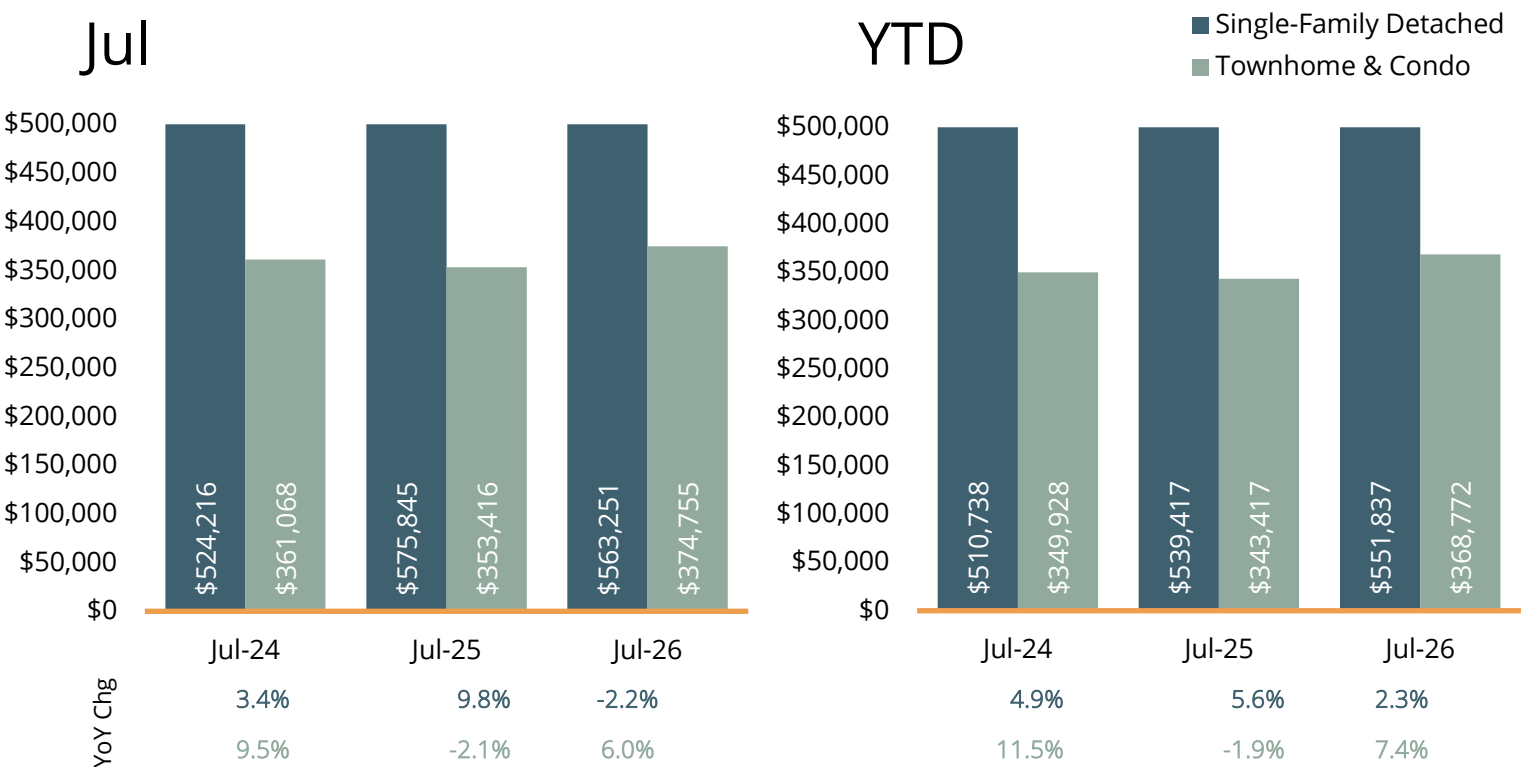


Source: Virginia REALTORS®, data accessed August 15, 2026

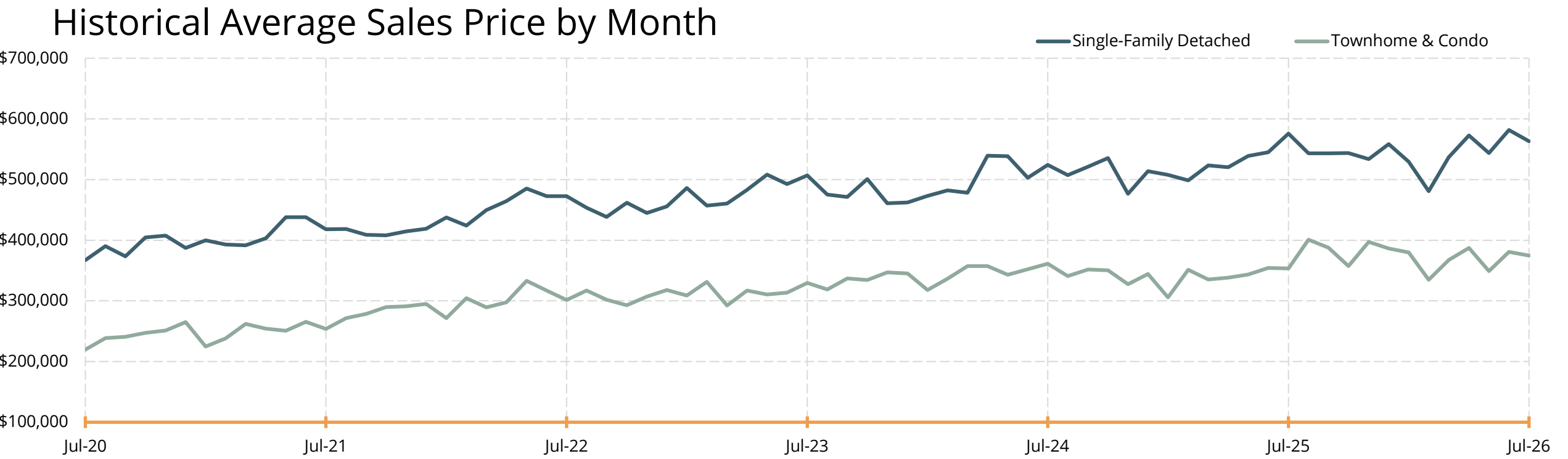
Average List Price



Average Sales Price

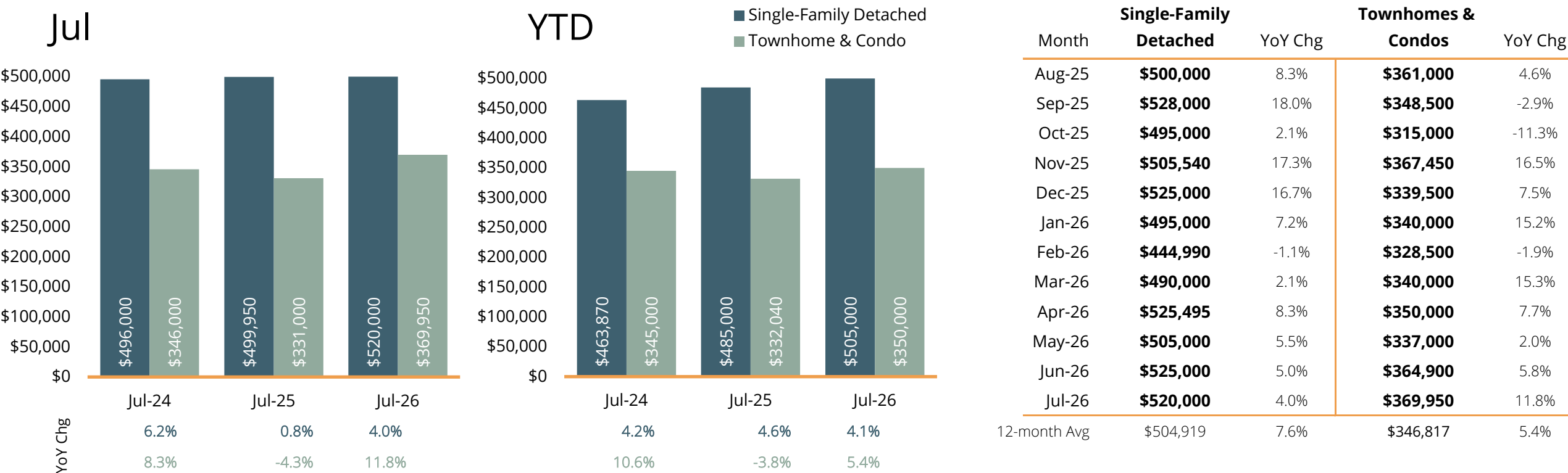


Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Aug-25	\$543,408	7.1%	\$400,881	17.6%
Sep-25	\$543,400	4.3%	\$387,676	10.2%
Oct-25	\$543,832	1.6%	\$357,248	1.9%
Nov-25	\$533,567	12.0%	\$397,225	21.3%
Dec-25	\$558,311	8.7%	\$386,296	12.2%
Jan-26	\$529,607	4.3%	\$379,927	24.2%
Feb-26	\$480,941	-3.5%	\$334,711	-4.7%
Mar-26	\$536,965	2.6%	\$367,170	9.5%
Apr-26	\$572,696	10.1%	\$387,108	14.5%
May-26	\$543,626	0.9%	\$349,185	1.6%
Jun-26	\$581,683	6.7%	\$380,917	7.5%
Jul-26	\$563,251	-2.2%	\$374,755	6.0%
12-month Avg	\$544,274	4.3%	\$375,258	9.9%

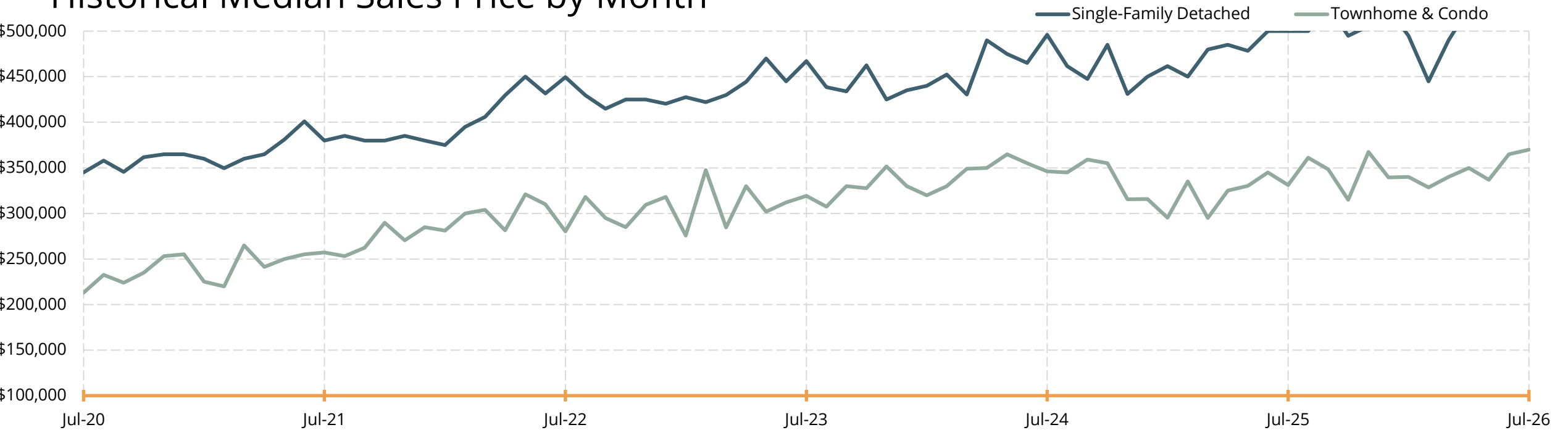


Source: Virginia REALTORS®, data accessed August 15, 2026

Median Sales Price

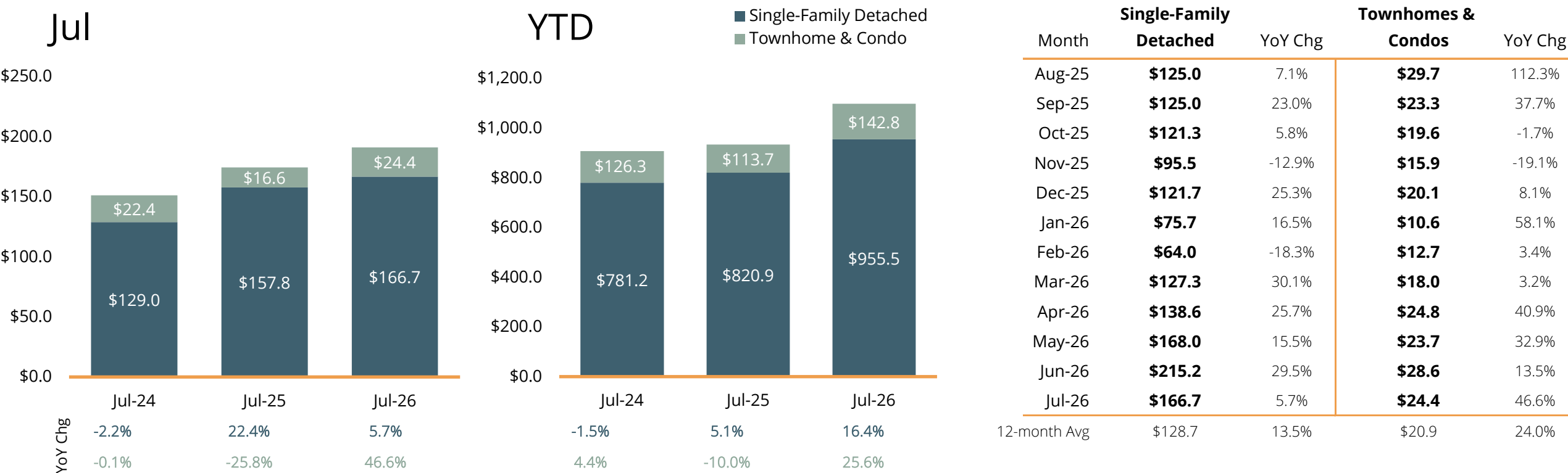


Historical Median Sales Price by Month

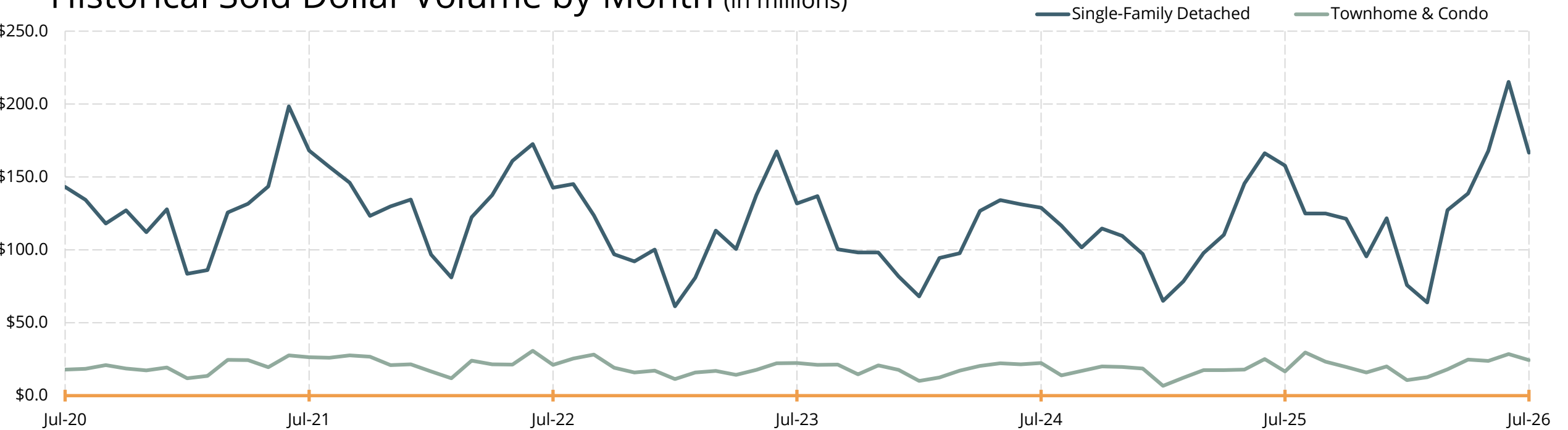


Source: Virginia REALTORS®, data accessed August 15, 2026

Sold Dollar Volume (in millions)

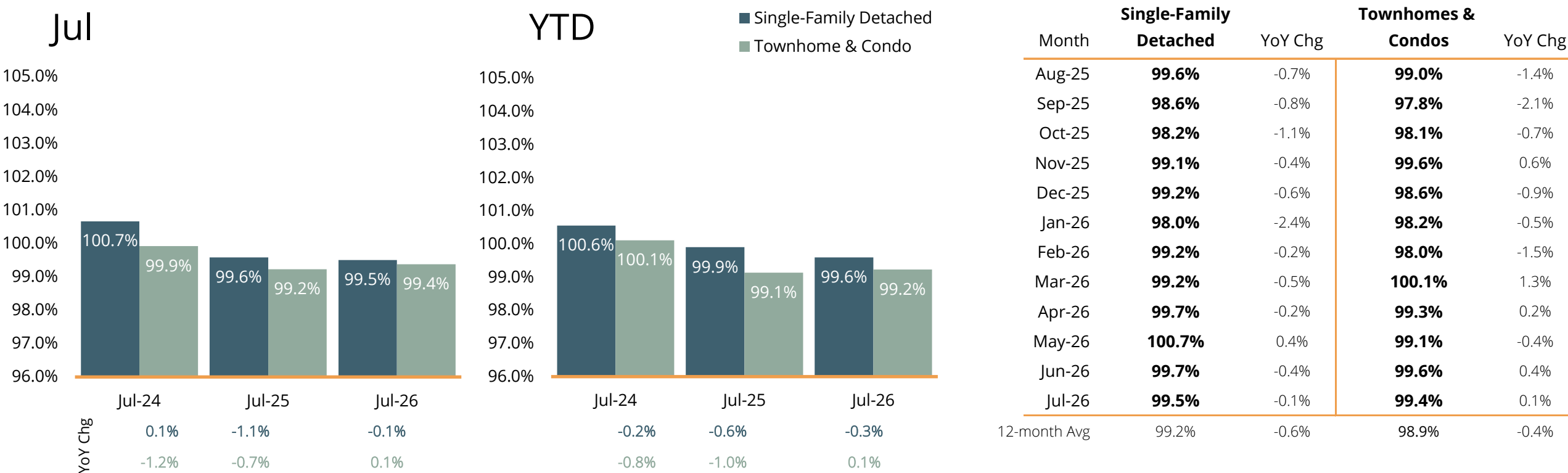


Historical Sold Dollar Volume by Month (in millions)

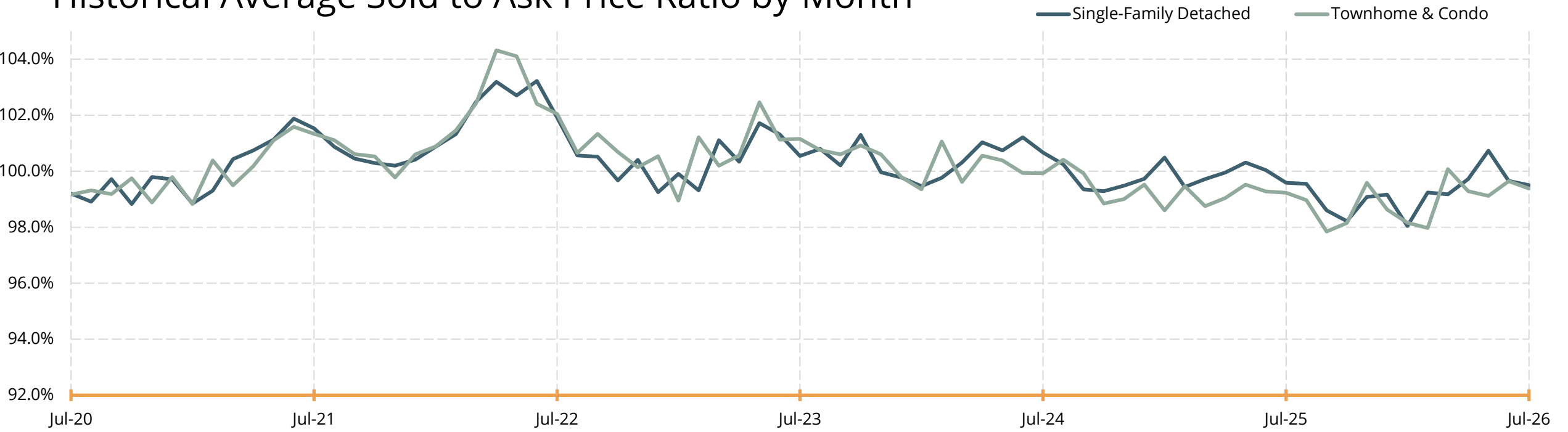


Source: Virginia REALTORS®, data accessed August 15, 2026

Average Sold to Ask Price Ratio

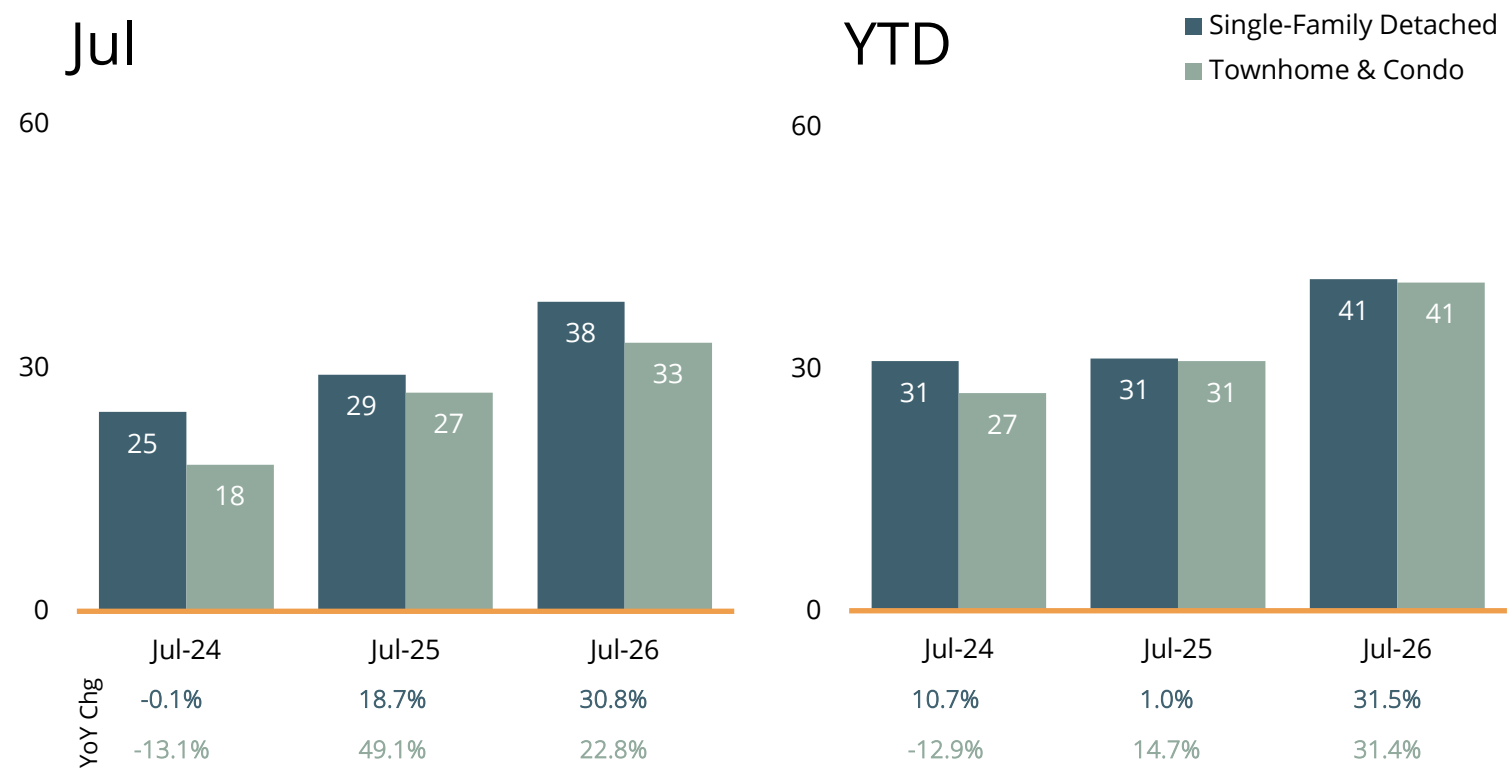


Historical Average Sold to Ask Price Ratio by Month



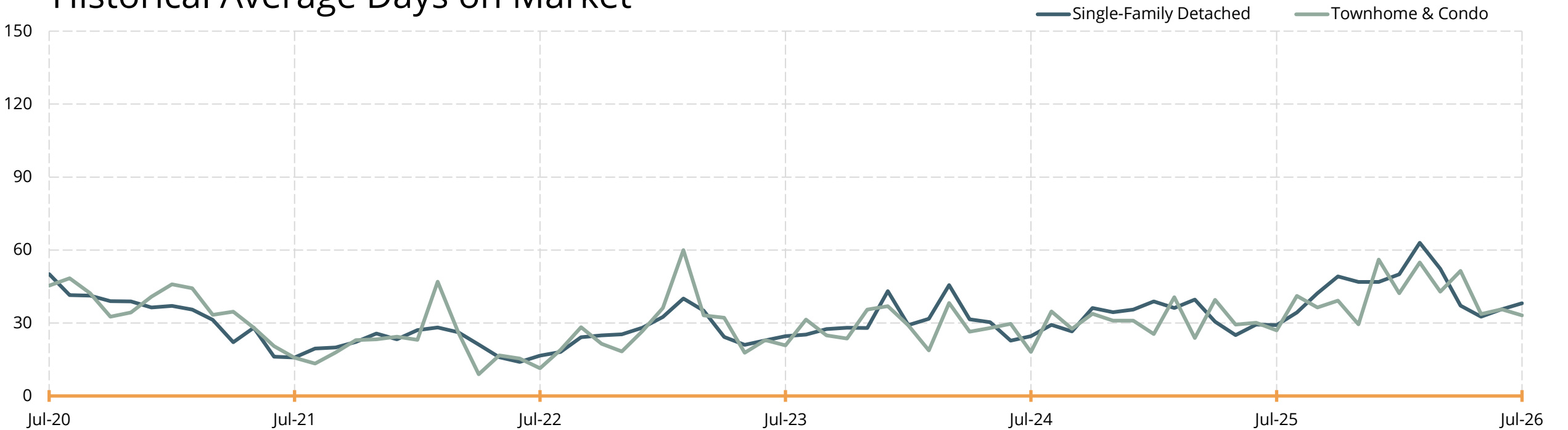
Source: Virginia REALTORS®, data accessed August 15, 2026

Average Days on Market



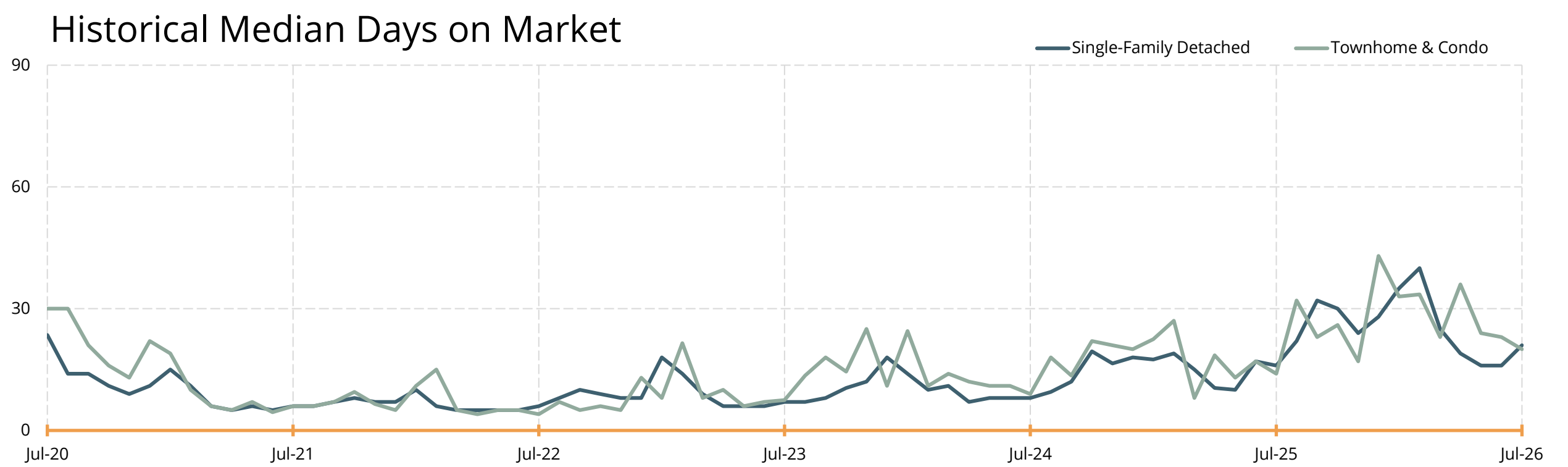
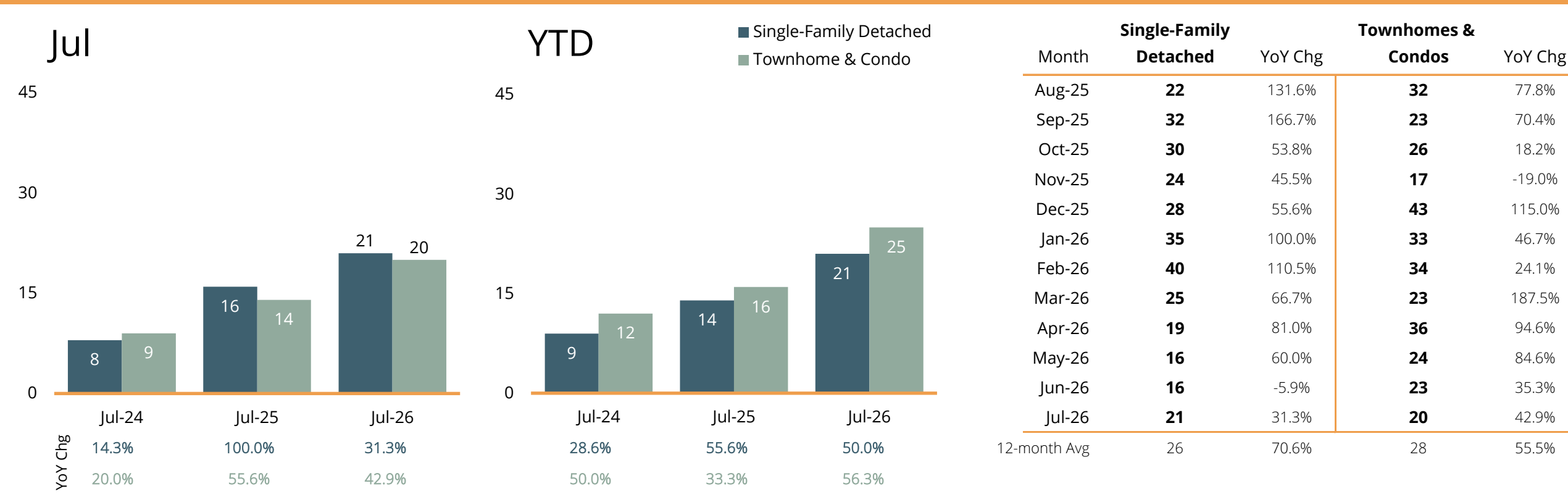
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Aug-25	34	17.1%	41	18.4%
Sep-25	42	59.4%	36	31.8%
Oct-25	49	35.9%	39	15.9%
Nov-25	47	36.3%	29	-5.1%
Dec-25	47	32.1%	56	81.1%
Jan-26	50	28.7%	42	65.5%
Feb-26	63	74.2%	55	35.1%
Mar-26	52	31.9%	43	80.3%
Apr-26	37	21.7%	51	29.9%
May-26	33	30.3%	34	14.9%
Jun-26	36	21.4%	36	18.6%
Jul-26	38	30.8%	33	22.8%
12-month Avg	44	35.3%	41	32.7%

Historical Average Days on Market

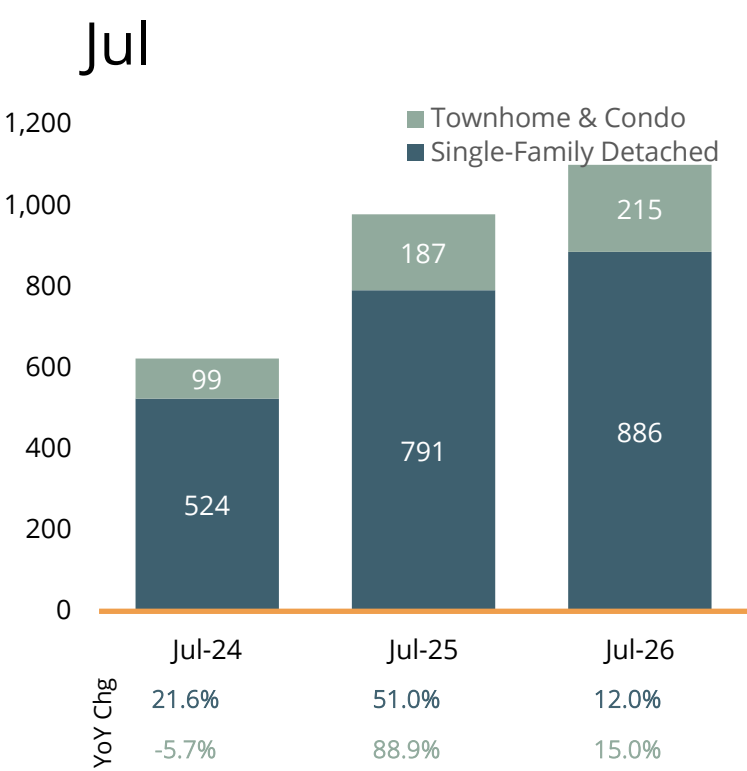


Source: Virginia REALTORS®, data accessed August 15, 2026

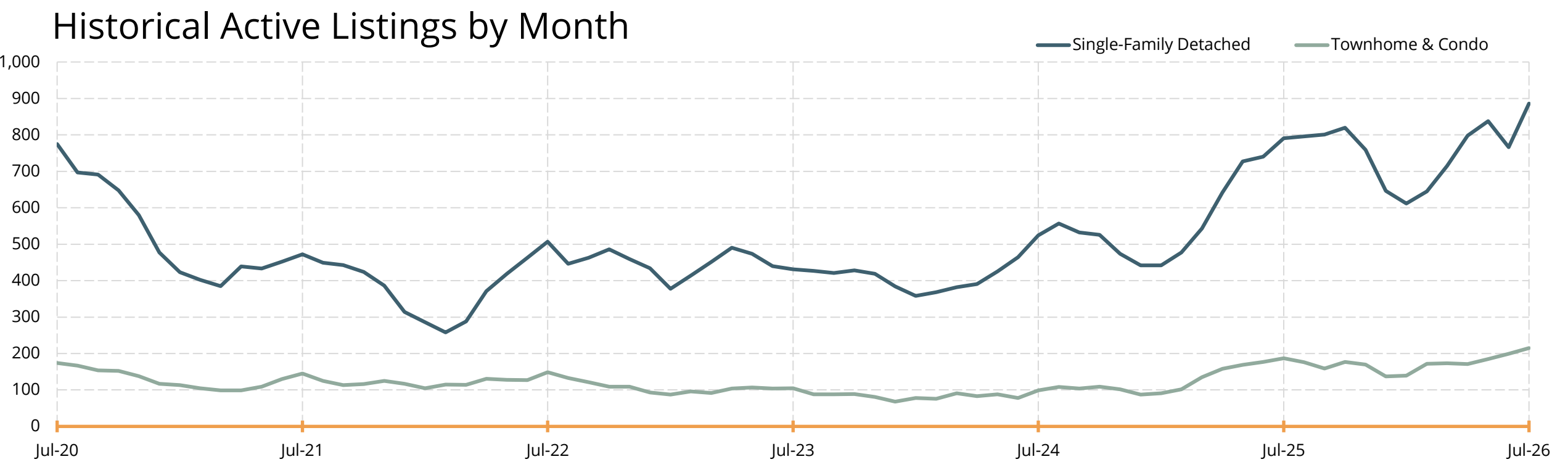
Median Days on Market



Active Listings



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
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%
Mar-26	715	31.7%	173	28.1%
Apr-26	798	24.3%	171	8.2%
May-26	838	15.3%	185	9.5%
Jun-26	766	3.5%	199	12.4%
Jul-26	886	12.0%	215	15.0%
12-month Avg	757	31.8%	173	35.6%

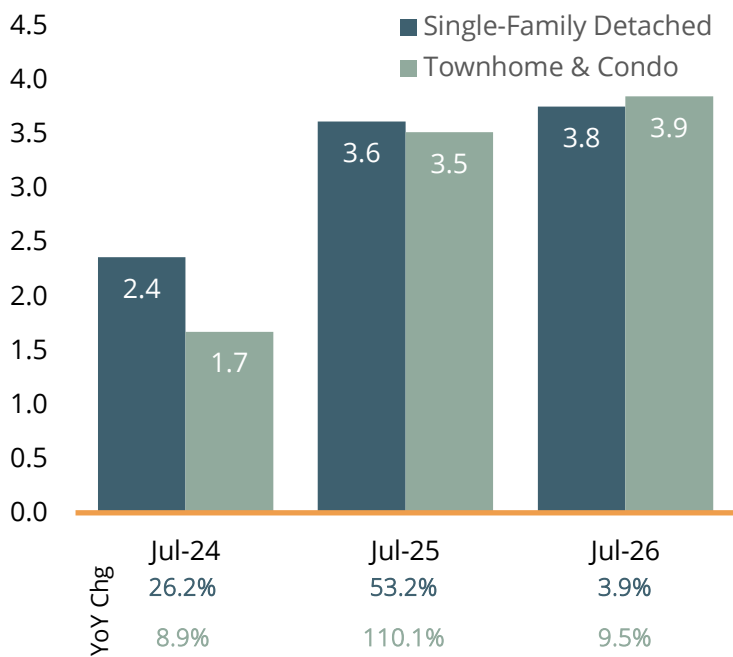


Source: Virginia REALTORS®, data accessed August 15, 2026

Months of Supply

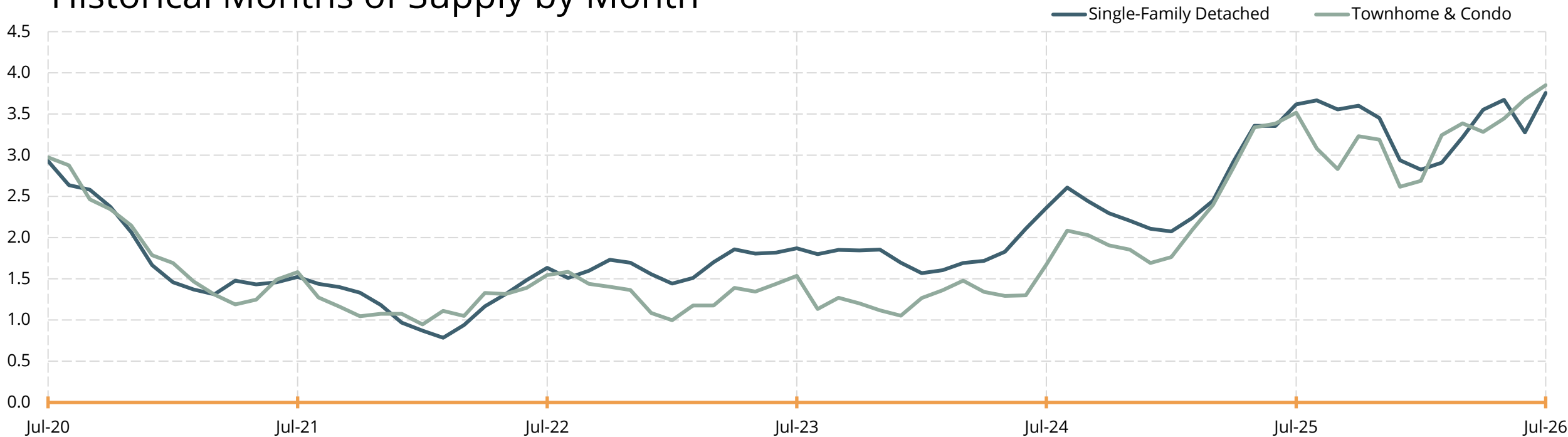


Jul



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Aug-25	3.7	40.7%	3.1	47.8%
Sep-25	3.6	45.4%	2.8	39.5%
Oct-25	3.6	56.9%	3.2	69.3%
Nov-25	3.5	56.4%	3.2	71.8%
Dec-25	2.9	39.4%	2.6	54.8%
Jan-26	2.8	36.1%	2.7	52.4%
Feb-26	2.9	30.0%	3.2	55.0%
Mar-26	3.2	31.5%	3.4	41.3%
Apr-26	3.6	21.4%	3.3	15.0%
May-26	3.7	9.4%	3.4	3.3%
Jun-26	3.3	-2.4%	3.7	8.8%
Jul-26	3.8	3.9%	3.9	9.5%
12-month Avg	3.4	27.6%	3.2	33.3%

Historical Months of Supply by Month



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

Area Overview - Total Market



New Listings				Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
Geography	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg
James City County	224	273	21.9%	152	170	11.8%	\$616,472	\$538,209	-12.7%	\$492,500	\$475,000	-3.6%	490	563	14.9%	3.8	4.2	8.4%
Williamsburg	22	19	-13.6%	7	28	300.0%	\$584,714	\$480,668	-17.8%	\$650,000	\$370,000	-43.1%	77	64	-16.9%	5.2	3.6	-31.6%
York County	122	159	30.3%	102	104	2.0%	\$469,332	\$544,179	15.9%	\$440,163	\$517,500	17.6%	250	270	8.0%	2.8	3.1	8.1%
New Kent County	64	74	15.6%	54	50	-7.4%	\$493,230	\$522,292	5.9%	\$460,200	\$480,975	4.5%	153	196	28.1%	3.9	4.3	9.7%
Charles City County	6	3	-50.0%	6	9	50.0%	\$348,200	\$379,772	9.1%	\$300,000	\$340,000	13.3%	8	8	0.0%	2.2	1.7	-21.5%

Area Overview - Total Market YTD



New Listings YTD				Sales YTD			Average Sales Price TYD			Median Sales Price TYD			Active Listings YTD		
Geography	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg
James City County	1,395	1,568	12.4%	864	984	13.9%	\$538,061	\$545,023	1.3%	\$473,450	\$492,600	4.0%	490	563	14.9%
Williamsburg	181	200	10.5%	101	128	26.7%	\$455,290	\$469,227	3.1%	\$400,000	\$380,000	-5.0%	77	64	-16.9%
York County	732	862	17.8%	569	633	11.2%	\$481,675	\$498,143	3.4%	\$455,500	\$466,005	2.3%	250	270	8.0%
New Kent County	476	610	28.2%	301	334	11.0%	\$470,911	\$514,915	9.3%	\$444,045	\$470,000	5.8%	153	196	28.1%
Charles City County	37	46	24.3%	29	38	31.0%	\$528,458	\$367,590	-30.4%	\$344,450	\$321,503	-6.7%	8	8	0.0%

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg
James City County	183	214	16.9%	125	138	10.4%	\$668,908	\$569,062	-14.9%	\$549,510	\$522,495	-4.9%	378	427	13.0%	3.8	4.0	6.3%
Williamsburg	17	14	-17.6%	5	18	260.0%	\$707,800	\$561,150	-20.7%	\$724,000	\$427,000	-41.0%	43	40	-7.0%	4.9	3.4	-30.3%
York County	105	134	27.6%	88	83	-5.7%	\$490,573	\$593,151	20.9%	\$473,250	\$560,000	18.3%	219	225	2.7%	3.0	3.2	5.2%
New Kent County	59	72	22.0%	50	48	-4.0%	\$507,390	\$530,034	4.5%	\$479,470	\$483,975	0.9%	143	186	30.1%	4.1	4.4	7.1%
Charles City County	6	3	-50.0%	6	9	50.0%	\$348,200	\$379,772	9.1%	\$300,000	\$340,000	13.3%	8	8	0.0%	2.2	1.7	-21.5%

Area Overview - Single Family Detached Market YTD



New Listings YTD				Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg
James City County	1,124	1,223	8.8%	690	780	13.0%	\$582,197	\$584,130	0.3%	\$530,000	\$525,000	-0.9%	378	427	13.0%
Williamsburg	122	122	0.0%	69	81	17.4%	\$522,947	\$536,074	2.5%	\$458,750	\$450,000	-1.9%	43	40	-7.0%
York County	621	714	15.0%	474	516	8.9%	\$510,410	\$535,235	4.9%	\$485,000	\$513,990	6.0%	219	225	2.7%
New Kent County	440	575	30.7%	271	315	16.2%	\$487,112	\$525,654	7.9%	\$459,950	\$480,000	4.4%	143	186	30.1%
Charles City County	37	46	24.3%	29	38	31.0%	\$528,458	\$367,590	-30.4%	\$344,450	\$321,503	-6.7%	8	8	0.0%

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg
James City County	41	59	43.9%	27	32	18.5%	\$373,712	\$405,159	8.4%	\$365,000	\$401,500	10.0%	112	136	21.4%	4.0	4.6	15.5%
Williamsburg	5	5	0.0%	2	10	400.0%	\$277,000	\$335,800	21.2%	\$277,000	\$362,500	30.9%	34	24	-29.4%	5.7	3.8	-33.1%
York County	17	25	47.1%	14	21	50.0%	\$335,814	\$350,622	4.4%	\$327,500	\$355,000	8.4%	31	45	45.2%	1.9	2.6	36.7%
New Kent County	5	2	-60.0%	4	2	-50.0%	\$316,229	\$336,469	6.4%	\$316,738	\$336,469	6.2%	10	10	0.0%	2.7	3.4	25.3%
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



New Listings YTD				Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
Geography	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg	Jul-25	Jul-26	% chg
James City County	271	345	27.3%	174	204	17.2%	\$359,714	\$395,844	10.0%	\$360,000	\$375,000	4.2%	112	136	21.4%
Williamsburg	59	78	32.2%	32	47	46.9%	\$315,747	\$352,600	11.7%	\$299,500	\$360,000	20.2%	34	24	-29.4%
York County	111	148	33.3%	95	117	23.2%	\$327,340	\$333,290	1.8%	\$321,500	\$335,000	4.2%	31	45	45.2%
New Kent County	36	35	-2.8%	30	19	-36.7%	\$328,243	\$335,178	2.1%	\$325,500	\$324,950	-0.2%	10	10	0.0%
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.