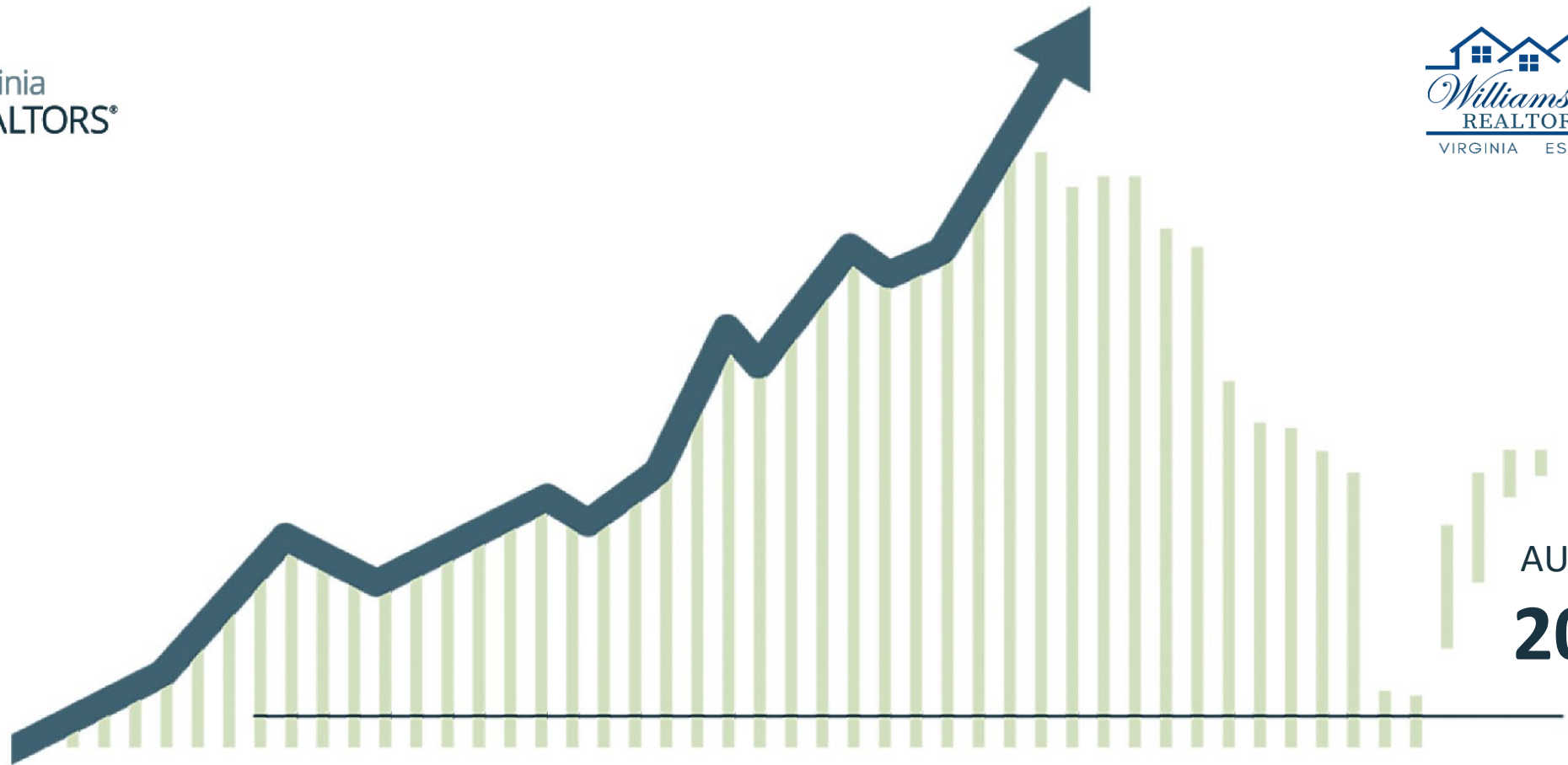




AUGUST
2026

WAAR WILLIAMSBURG

MARKET INDICATORS REPORT

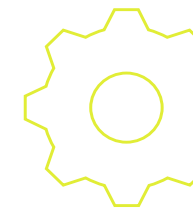
CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

WAAR Market Indicators Report



Key Market Trends: August 2026

- > **Sales activity continued to increase across the WAAR footprint this month.** Home sales went up 6.9% resulting in 325 total sales in August, 21 more than last year. Williamsburg experienced a sharp increase in activity this month with 17 more sales compared to a year earlier (+141.7%). There was a small uptick in sales in James City County with four additional home sales (+2.5%). The only market where sales decreased was Charles City County which had two fewer sales than a year ago (-50.0%).
- > **For the 10th consecutive month, pending sales increased in the WAAR area.** There were 299 pending sales in August, up 15% from the previous year, which is 39 additional pending sales. The market with the biggest uptick in pending sales was York County with 23 more than the year prior (+38.3%). Activity also grew in James City County with 13 more pending sales than last August (+9.7%). After rising for most of the year, pending sales fell 6.5% in New Kent County resulting in three fewer pending transactions this month.
- > **Regionwide, there was a small uptick in the median price this month.** Homes sold at a median price of \$470,000 in the area, \$6,500 more than last year, a 1.4% price increase. At \$307,000, homes sold for \$47,550 more in Charles City County compared to last August (+18.3%). Prices also grew in New Kent County with the median price up \$36,500 from the year before (+8.2%). Williamsburg experienced a \$198,700 drop in median sales price, the third straight month where prices have declined (-35.4%). There was no change in the median home price in James City County.
- > **There was more supply on the market as active and new listings surged in the WAAR region.** Listings rose 9.7% leading to 1,066 total listings at the end of August, 94 more than the year before. James City County led all other markets in listings with 83 more than last year (+18.2%) while New Kent County had 28 additional listings this month (+17.4%). For the second straight month, Williamsburg experienced a drop-off in activity with 22 fewer listings than the year prior (-25.0%).



WAAR Market Dashboard

YoY Chg	Aug-26	Indicator
▲ 6.9%	325	Sales
▲ 15.0%	299	Pending Sales
▲ 13.2%	428	New Listings
▼ -0.9%	\$507,928	Average List Price
▼ -1.4%	\$501,736	Average Sales Price
▲ 1.4%	\$470,000	Median Sales Price
▲ 0.7%	\$222	Average Price Per Square Foot
▲ 5.4%	\$163.1	Sold Dollar Volume (in millions)
▼ -0.5%	98.9%	Average Sold/Ask Price Ratio
▲ 9.4%	39	Average Days on Market
▼ -2.0%	24	Median Days on Market
▲ 9.7%	1,066	Active Listings
▲ 2.1%	3.6	Months of Supply

INTEREST RATE
TRACKER



Report Index



Market Activity - WAAR Footprint -----	4
Total Market Overview -----	5
Total Market by Price Range Overview -----	6
Single-Family Detached Market Overview -----	7
Single-Family Detached Market by Price Range Overview -----	8
Townhome & Condo Market Overview -----	9
Townhome & Condo Market by Price Range Overview -----	10
Sales -----	11
Pending Sales -----	12
New Listings -----	13
Average List Price -----	14
Average Sales Price -----	15
Median Sales Price -----	16
Sold Dollar Volume -----	17
Average Sold to Ask Price Ratio -----	18
Average Days on Market -----	19
Median Days on Market -----	20
Active Listings -----	21
Months of Supply -----	22
Area Overview - Total Market -----	23
Area Overview - Total Market YTD -----	24
Area Overview - Single-Family Detached Market -----	25
Area Overview - Single-Family Detached Market YTD -----	26
Area Overview - Townhome & Condo Market -----	27

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.

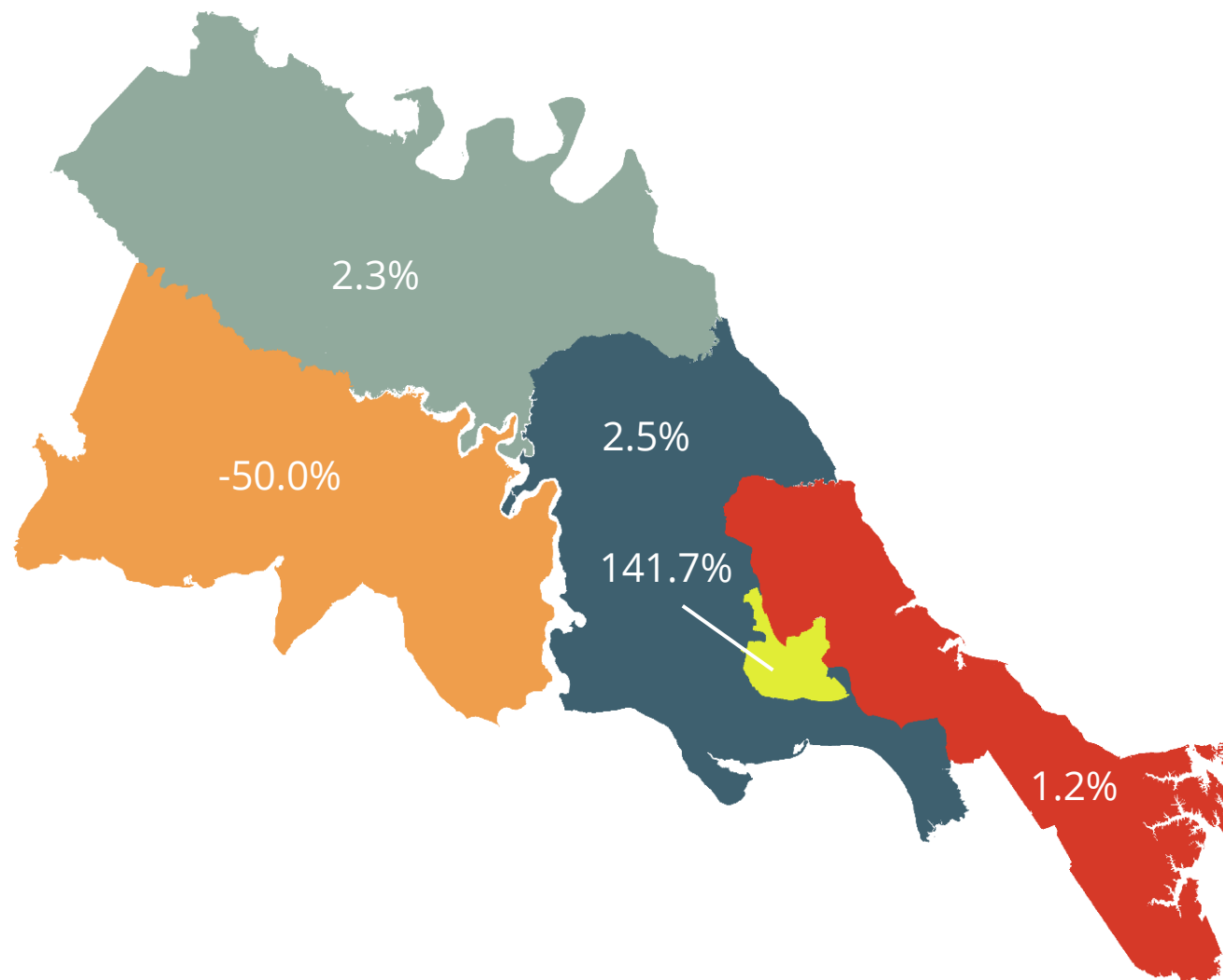
REALTORS® are well-informed about critical factors that affect your specific market area – such as changes in market conditions, consumer attitudes and interest rates.

Are You Ready to Buy or Sell Real Estate?

Contact an experienced REALTOR®.



Market Activity - WAAR Footprint



Jurisdiction	Total Sales		
	Aug-25	Aug-26	% Chg
Charles City County	4	2	-50.0%
James City County	159	163	2.5%
New Kent County	44	45	2.3%
Williamsburg	12	29	141.7%
York County	85	86	1.2%
WAAR	304	325	6.9%

Total Market Overview



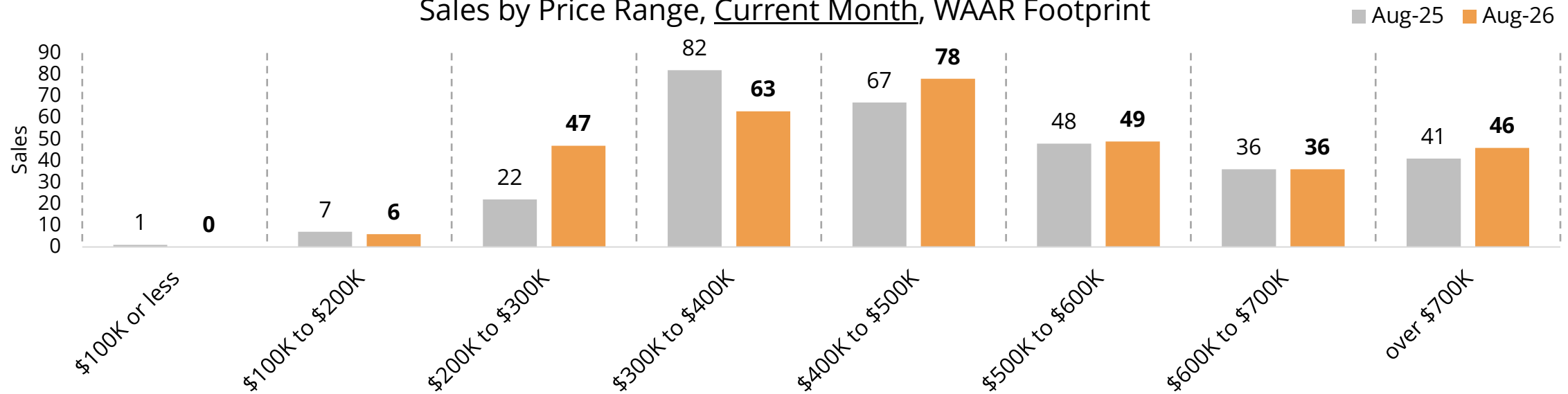
Key Metrics	Aug-24	2-year Trends	Aug-26	Aug-25	Aug-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
Sales				304	325	6.9%	2,168	2,442	12.6%
Pending Sales				260	299	15.0%	1,986	2,256	13.6%
New Listings				378	428	13.2%	3,199	3,714	16.1%
Average List Price				\$512,606	\$507,928	-0.9%	\$508,900	\$519,463	2.1%
Average Sales Price				\$508,714	\$501,736	-1.4%	\$505,864	\$516,166	2.0%
Median Sales Price				\$463,500	\$470,000	1.4%	\$455,000	\$470,951	3.5%
Average Price Per Square Foot				\$220	\$222	0.7%	\$220	\$225	2.5%
Sold Dollar Volume (in millions)				\$154.6	\$163.1	5.4%	\$1,089.3	\$1,261.3	15.8%
Average Sold/Ask Price Ratio				99.4%	98.9%	-0.5%	99.7%	99.5%	-0.3%
Average Days on Market				36	39	9.4%	32	41	28.2%
Median Days on Market				25	24	-2.0%	15	22	46.7%
Active Listings				972	1,066	9.7%	n/a	n/a	n/a
Months of Supply				3.6	3.6	2.1%	n/a	n/a	n/a

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

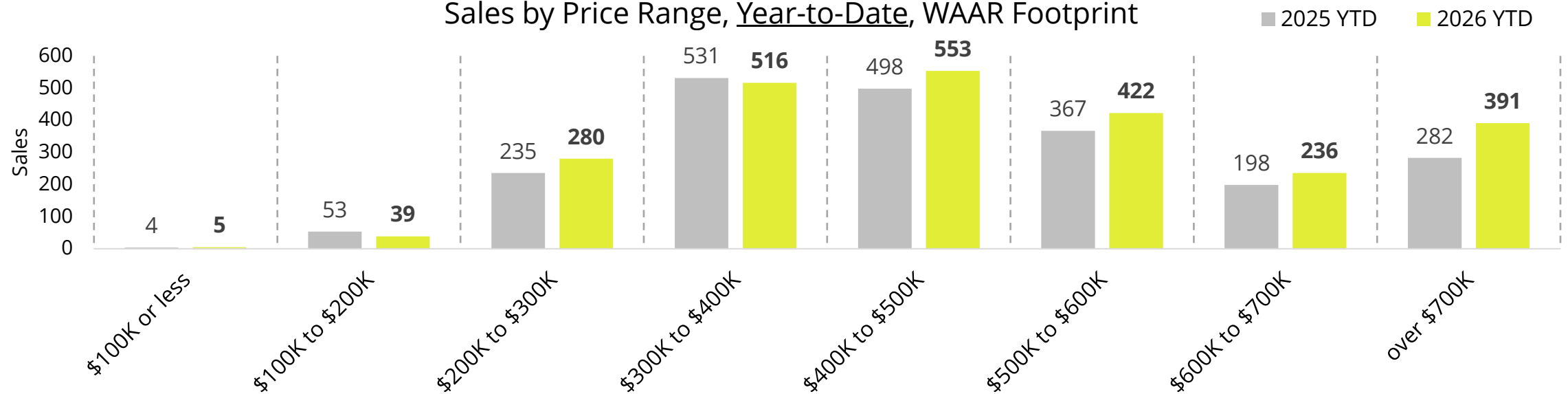
Total Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Single-Family Detached Market Overview



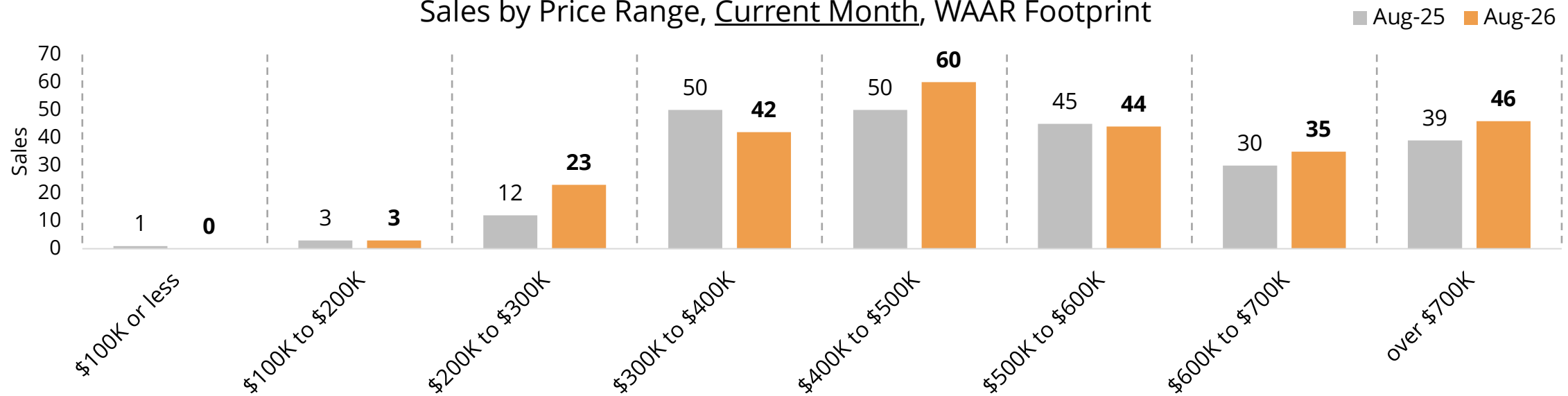
Key Metrics	Aug-24	2-year Trends	Aug-26	Aug-25	Aug-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
Sales				230	253	10.0%	1,763	1,983	12.5%
Pending Sales				209	229	9.6%	1,673	1,884	12.6%
New Listings				300	350	16.7%	2,644	3,030	14.6%
Average List Price				\$547,379	\$550,382	0.5%	\$543,021	\$554,112	2.0%
Average Sales Price				\$543,408	\$543,472	0.0%	\$539,936	\$550,703	2.0%
Median Sales Price				\$500,000	\$495,000	-1.0%	\$485,600	\$503,870	3.8%
Average Price Per Square Foot				\$219	\$228	3.8%	\$221	\$227	2.6%
Sold Dollar Volume (in millions)				\$125.0	\$137.5	10.0%	\$945.9	\$1,093.0	15.5%
Average Sold/Ask Price Ratio				99.6%	98.9%	-0.6%	99.9%	99.5%	-0.3%
Average Days on Market				34	38	12.1%	32	41	29.0%
Median Days on Market				22	22	0.0%	15	22	46.7%
Active Listings				796	870	9.3%	n/a	n/a	n/a
Months of Supply				3.7	3.7	-0.3%	n/a	n/a	n/a

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

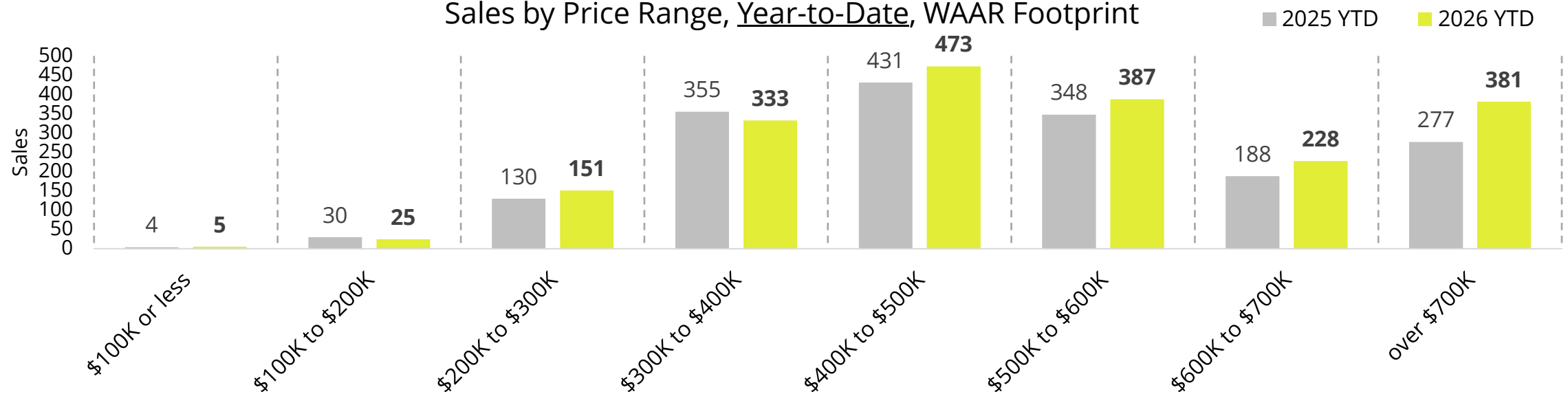
Single-Family Detached Market by Price Range



Sales by Price Range, Current Month, WAAR Footprint



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



Townhome & Condo Market Overview



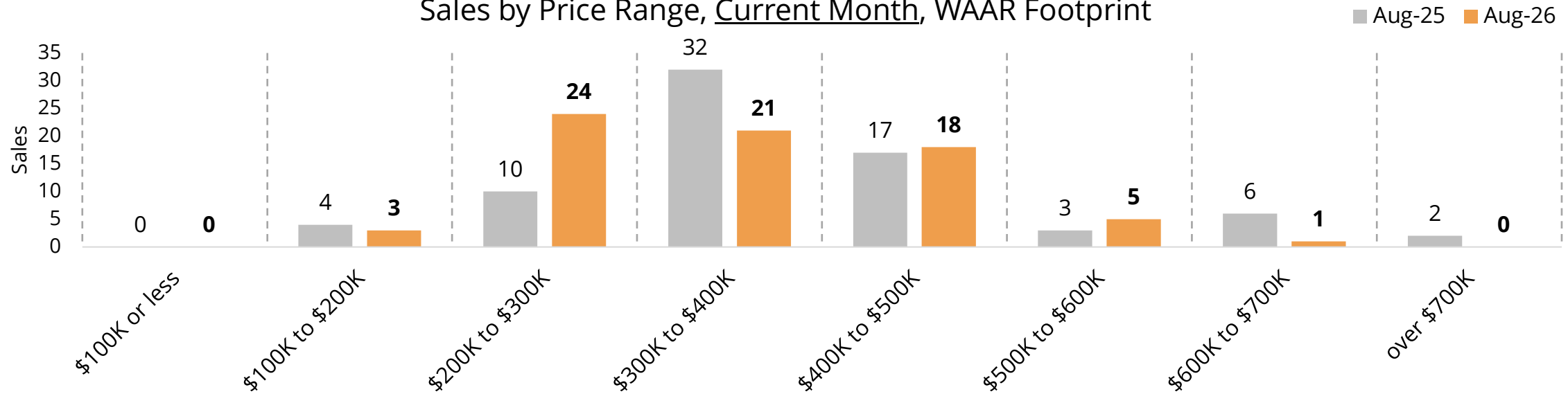
Key Metrics	2-year Trends			Aug-25	Aug-26	YoY Chg	2025 YTD	2026 YTD	YoY Chg
	Aug-24		Aug-26						
Sales				74	72	-2.7%	405	459	13.3%
Pending Sales				51	70	37.3%	313	372	18.8%
New Listings				78	78	0.0%	555	684	23.2%
Average List Price				\$404,529	\$358,751	-11.3%	\$356,945	\$369,442	3.5%
Average Sales Price				\$400,881	\$355,079	-11.4%	\$354,128	\$366,630	3.5%
Median Sales Price				\$361,000	\$350,000	-3.0%	\$340,000	\$350,000	2.9%
Average Price Per Square Foot				\$224	\$195	-13.1%	\$208	\$211	1.8%
Sold Dollar Volume (in millions)				\$29.7	\$25.6	-13.8%	\$143.3	\$168.4	17.5%
Average Sold/Ask Price Ratio				99.0%	99.0%	0.0%	99.1%	99.2%	0.1%
Average Days on Market				41	42	3.1%	33	41	24.6%
Median Days on Market				32	27	-15.6%	19	25	31.6%
Active Listings				176	196	11.4%	n/a	n/a	n/a
Months of Supply				3.1	3.5	14.0%	n/a	n/a	n/a

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

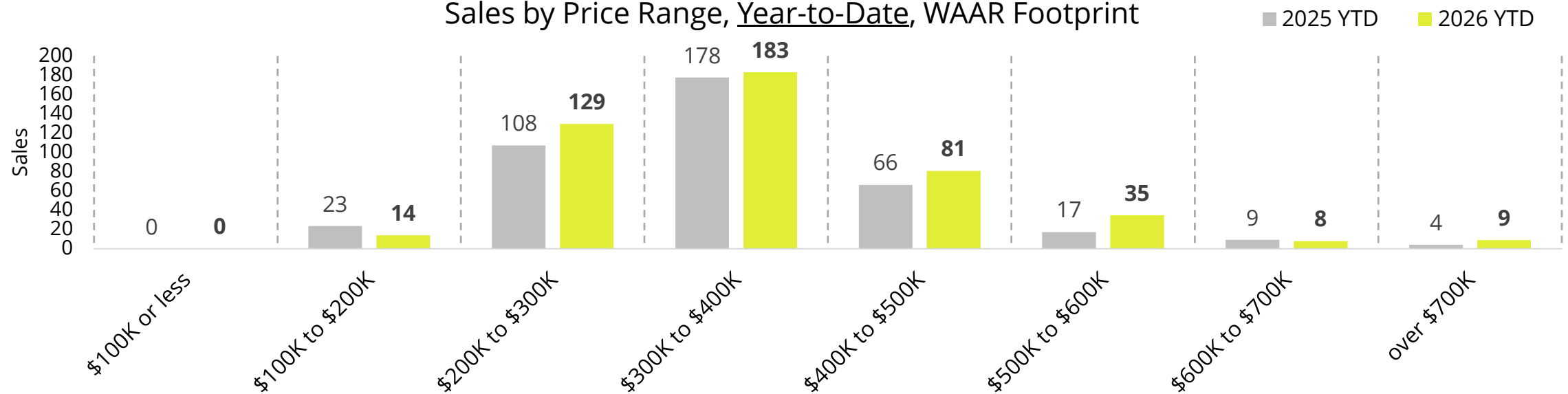
Townhome & Condo Market by Price Range



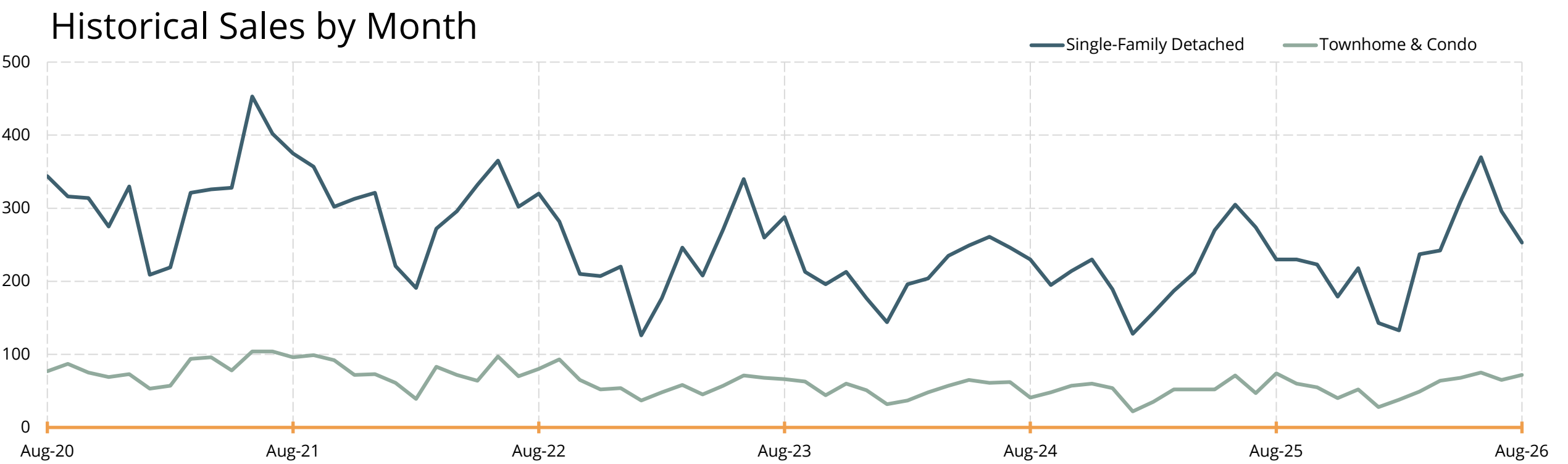
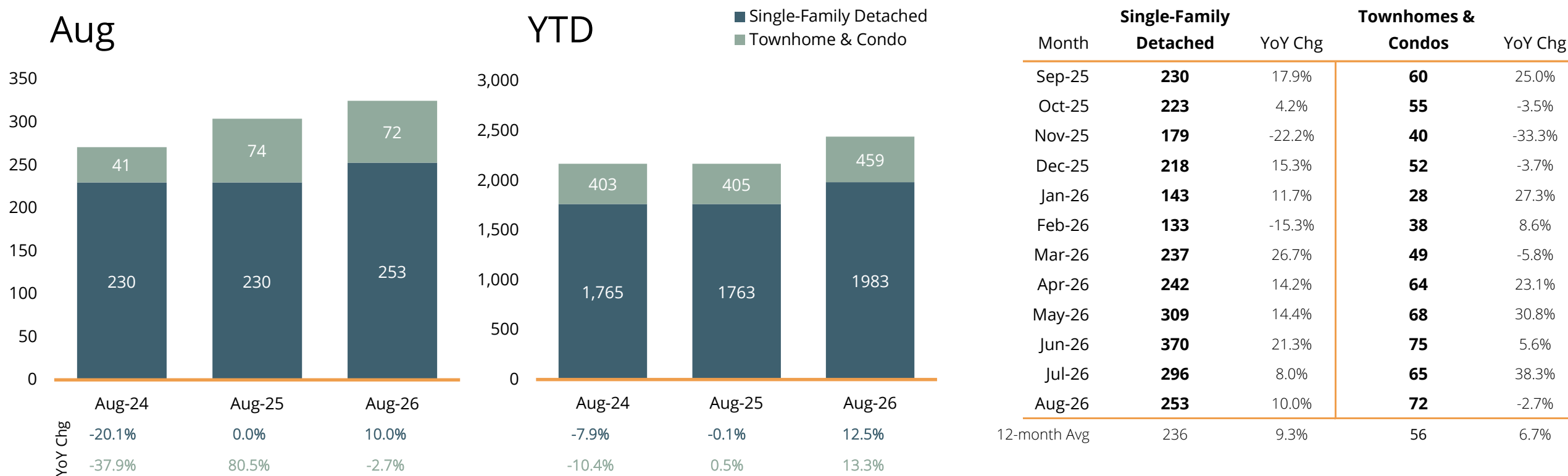
Sales by Price Range, Current Month, WAAR Footprint



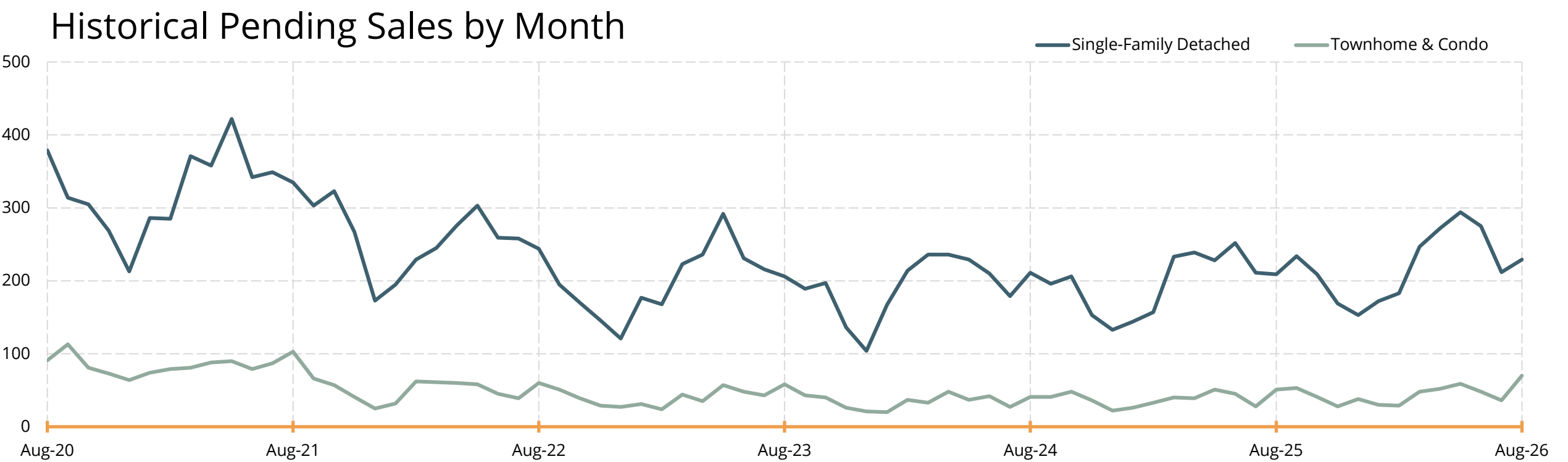
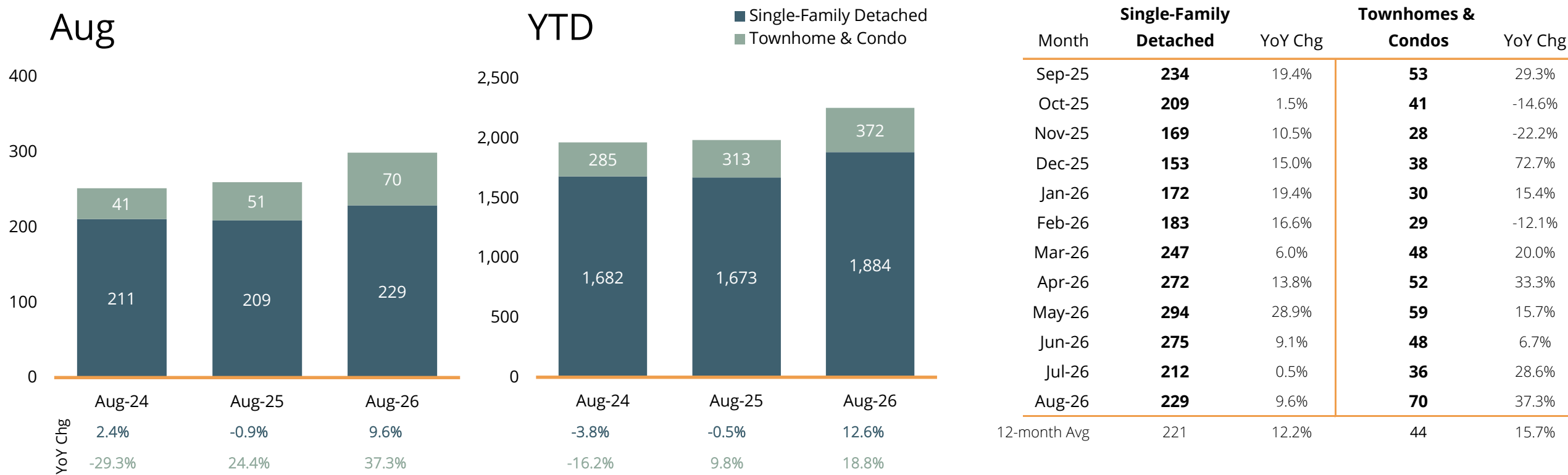
Sales by Price Range, Year-to-Date, WAAR Footprint



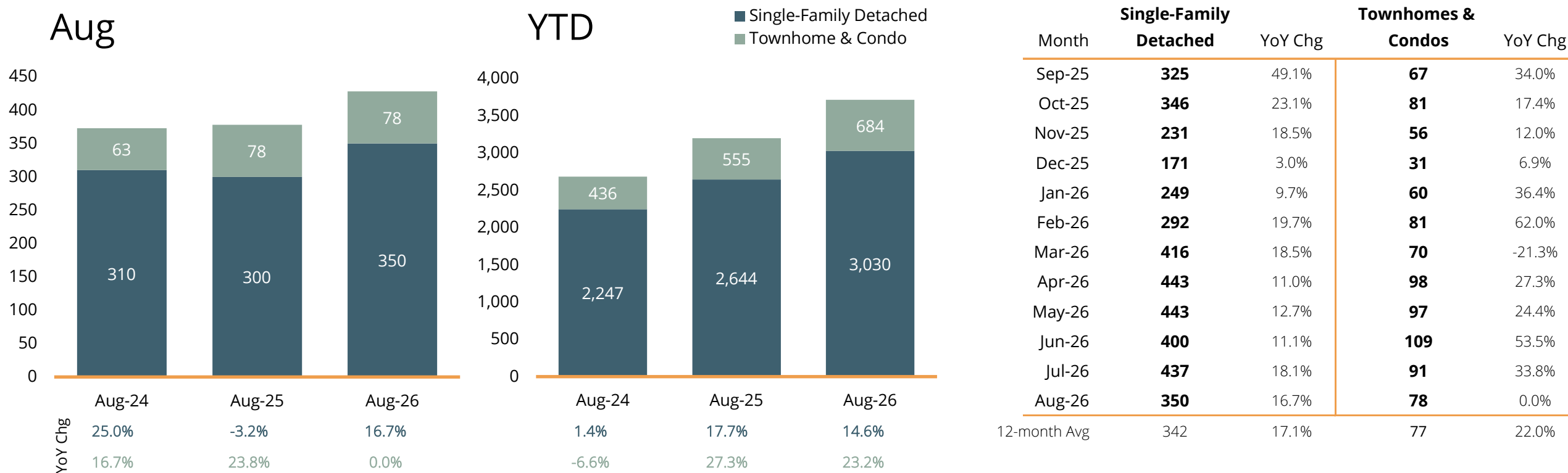
Sales



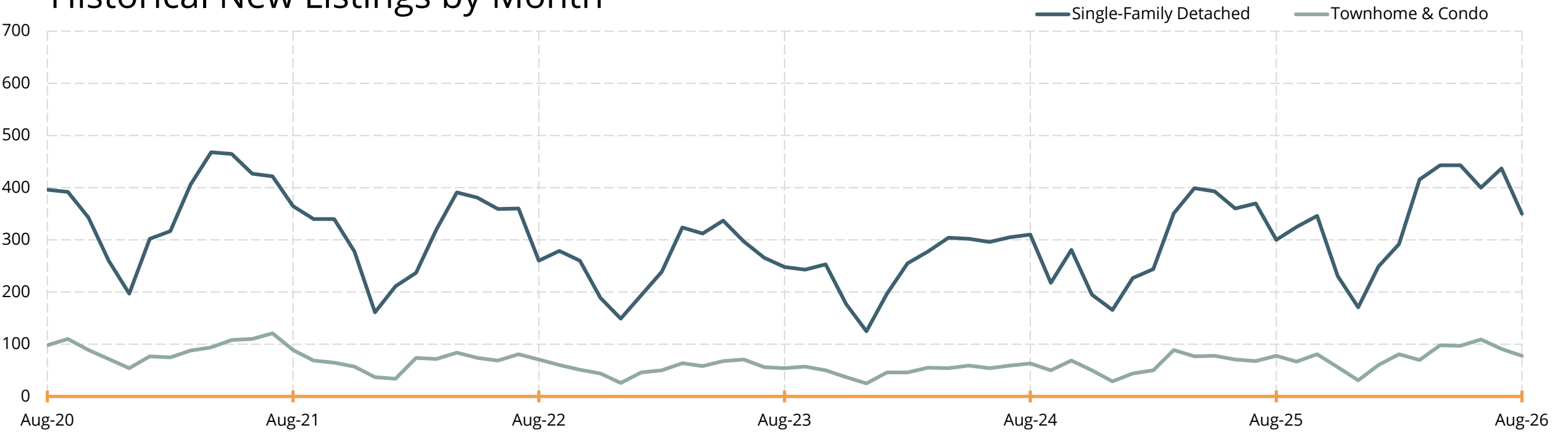
Pending Sales



New Listings

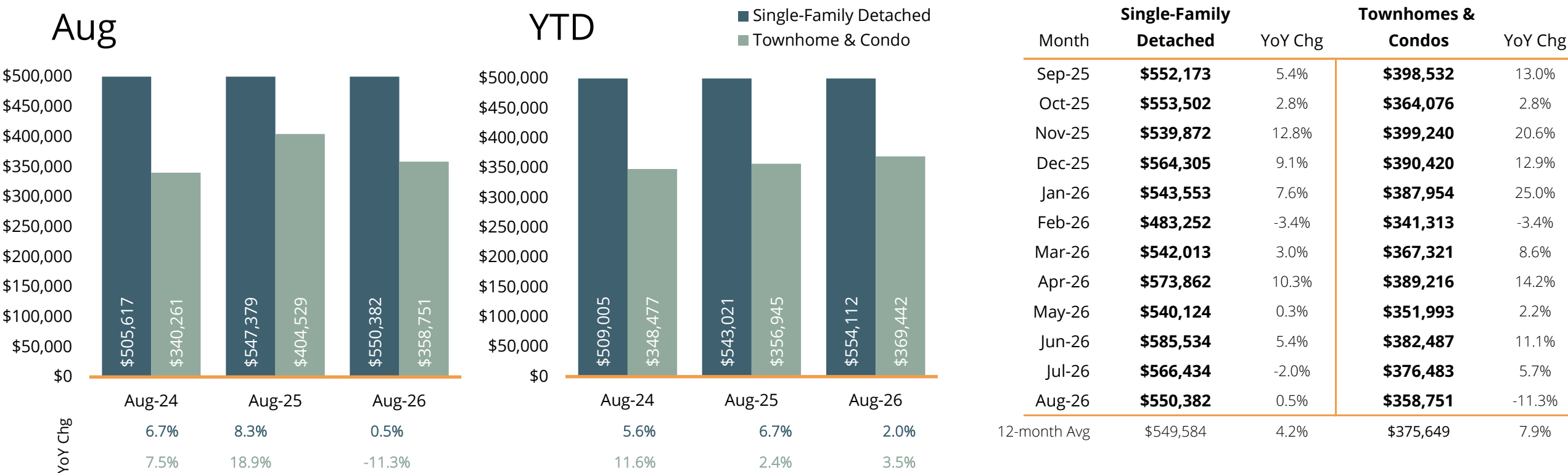


Historical New Listings by Month

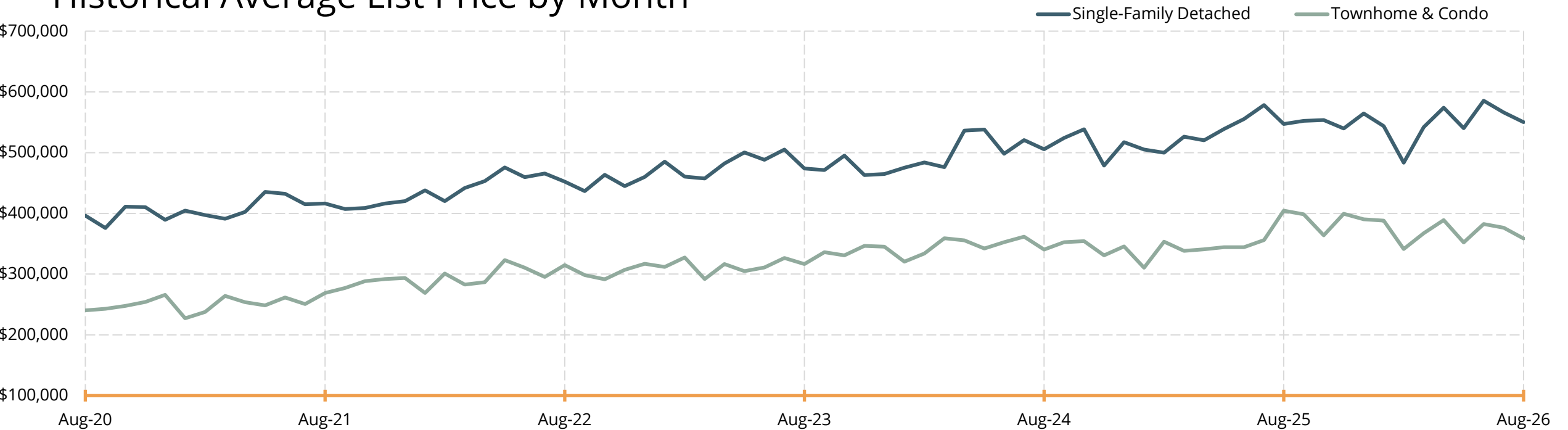


Source: Virginia REALTORS®, data accessed September 15, 2026

Average List Price

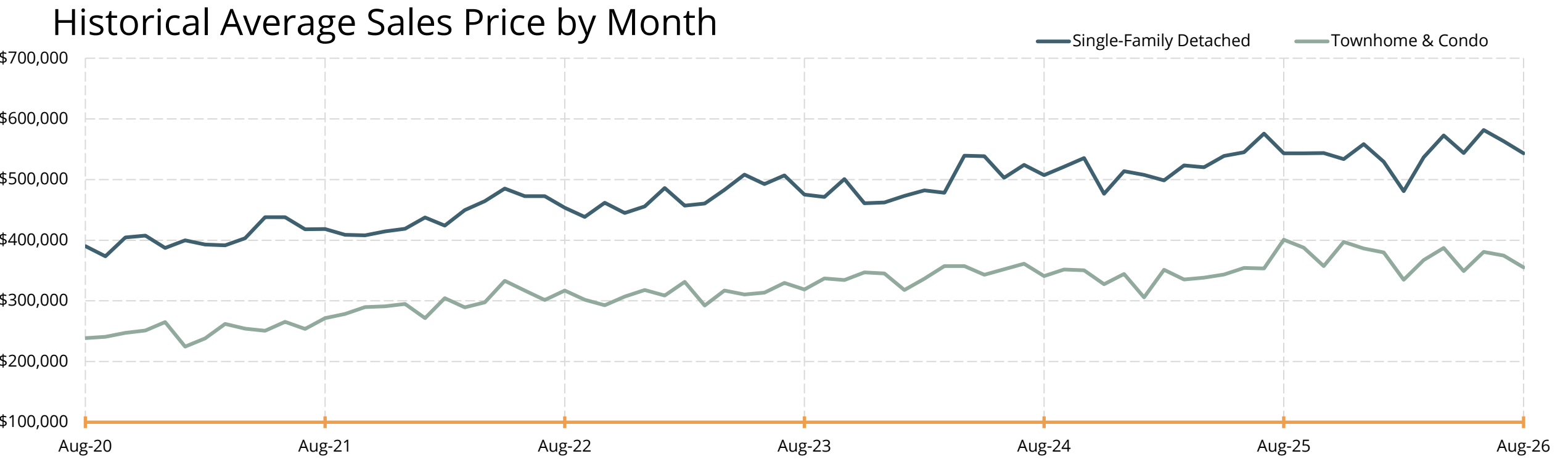
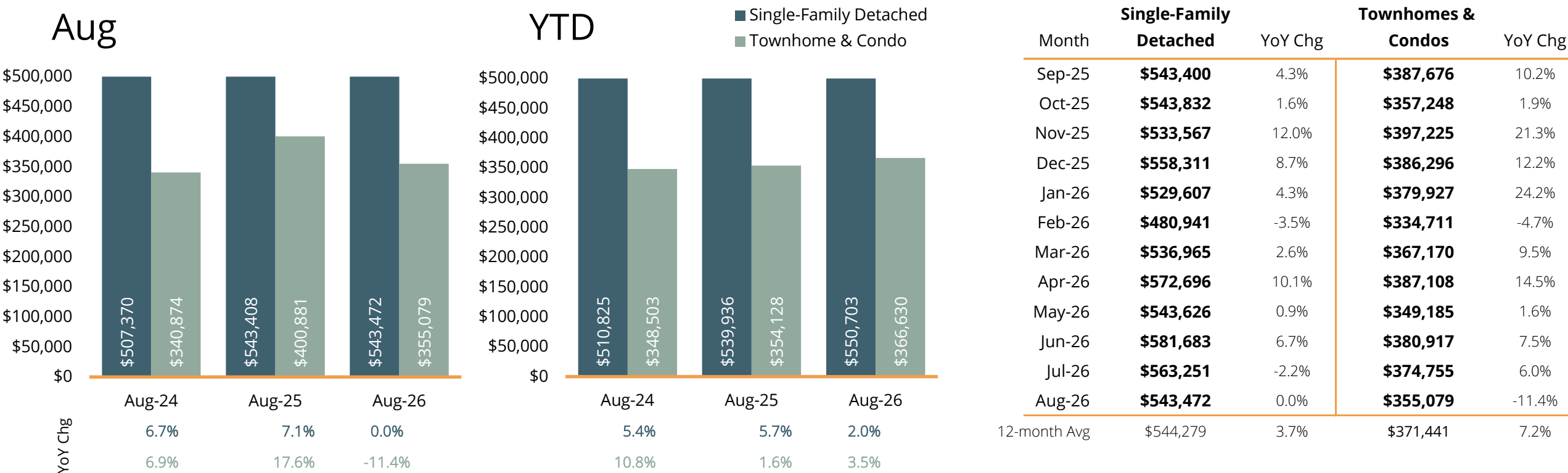


Historical Average List Price by Month

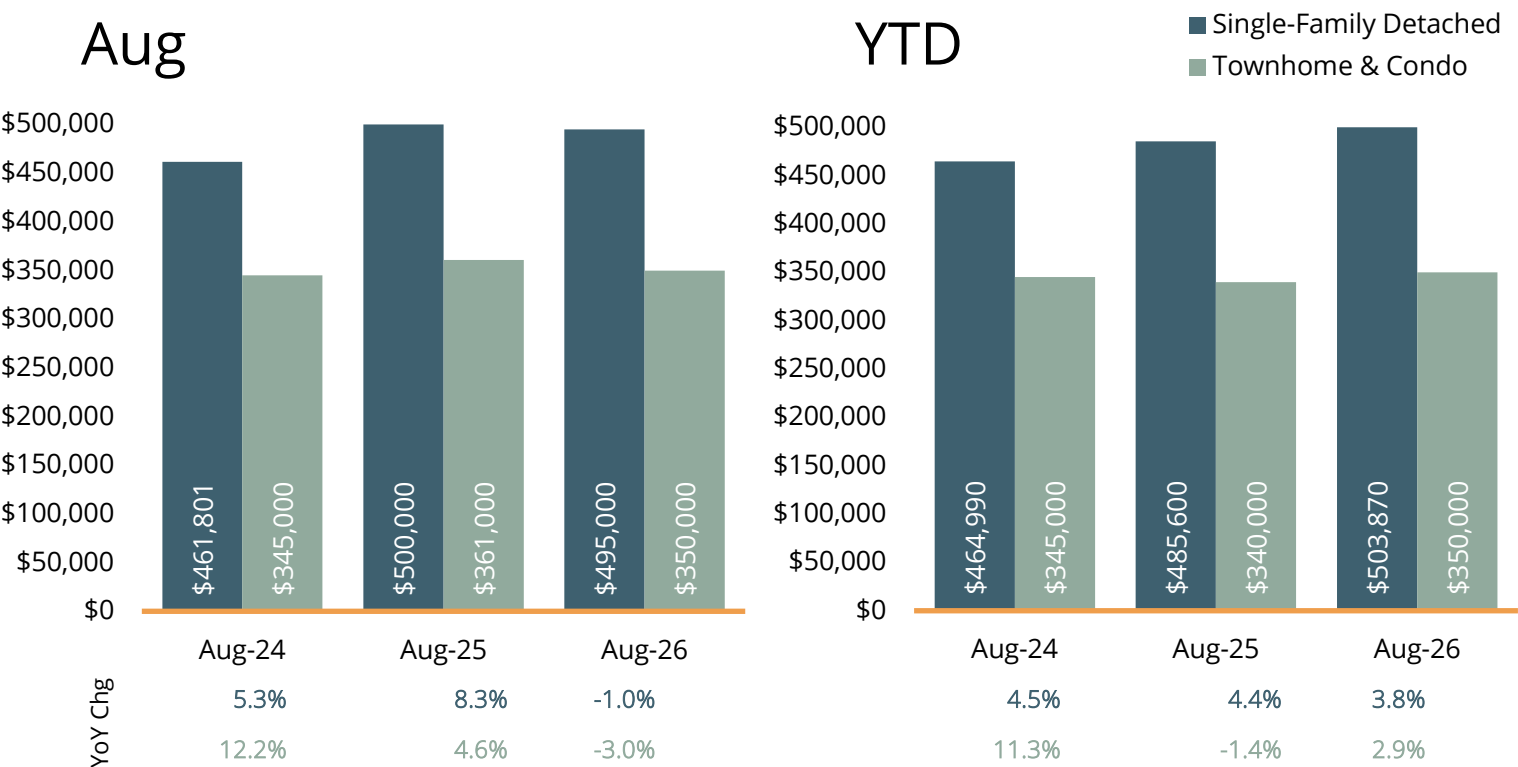


Source: Virginia REALTORS®, data accessed September 15, 2026

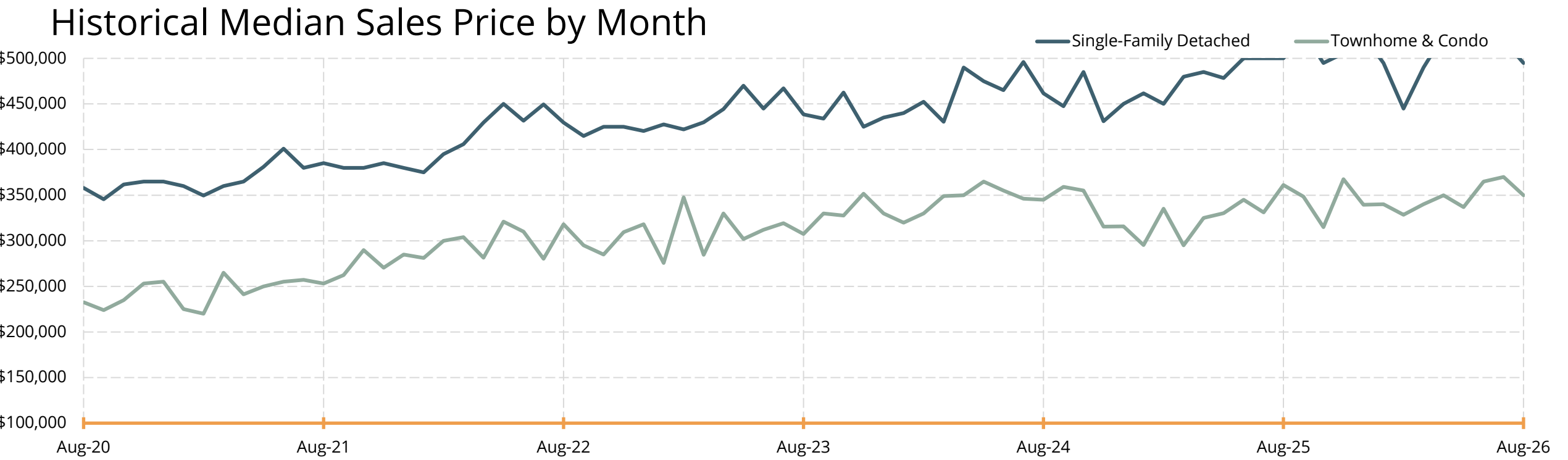
Average Sales Price



Median Sales Price

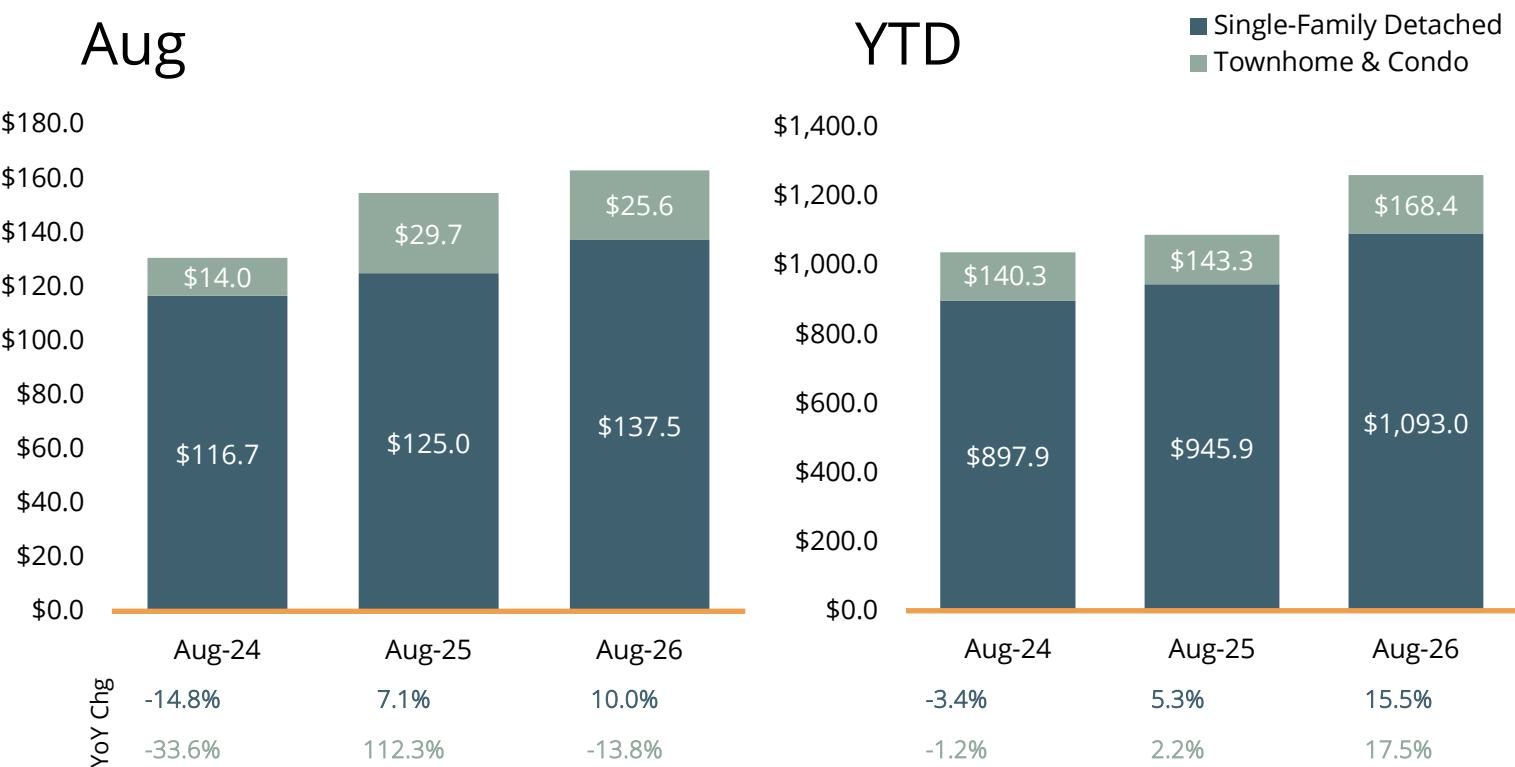


Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Sep-25	\$528,000	18.0%	\$348,500	-2.9%
Oct-25	\$495,000	2.1%	\$315,000	-11.3%
Nov-25	\$505,540	17.3%	\$367,450	16.5%
Dec-25	\$525,000	16.7%	\$339,500	7.5%
Jan-26	\$495,000	7.2%	\$340,000	15.2%
Feb-26	\$444,990	-1.1%	\$328,500	-1.9%
Mar-26	\$490,000	2.1%	\$340,000	15.3%
Apr-26	\$525,495	8.3%	\$350,000	7.7%
May-26	\$505,000	5.5%	\$337,000	2.0%
Jun-26	\$525,000	5.0%	\$364,900	5.8%
Jul-26	\$520,000	4.0%	\$369,950	11.8%
Aug-26	\$495,000	-1.0%	\$350,000	-3.0%
12-month Avg	\$504,502	6.8%	\$345,900	4.7%



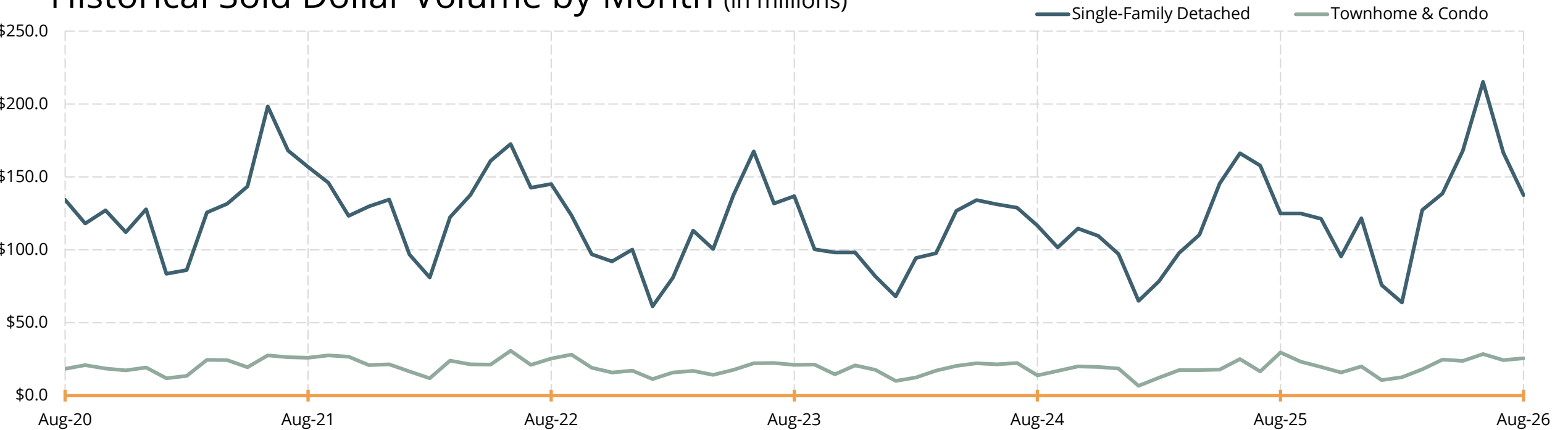
Source: Virginia REALTORS®, data accessed September 15, 2026

Sold Dollar Volume (in millions)



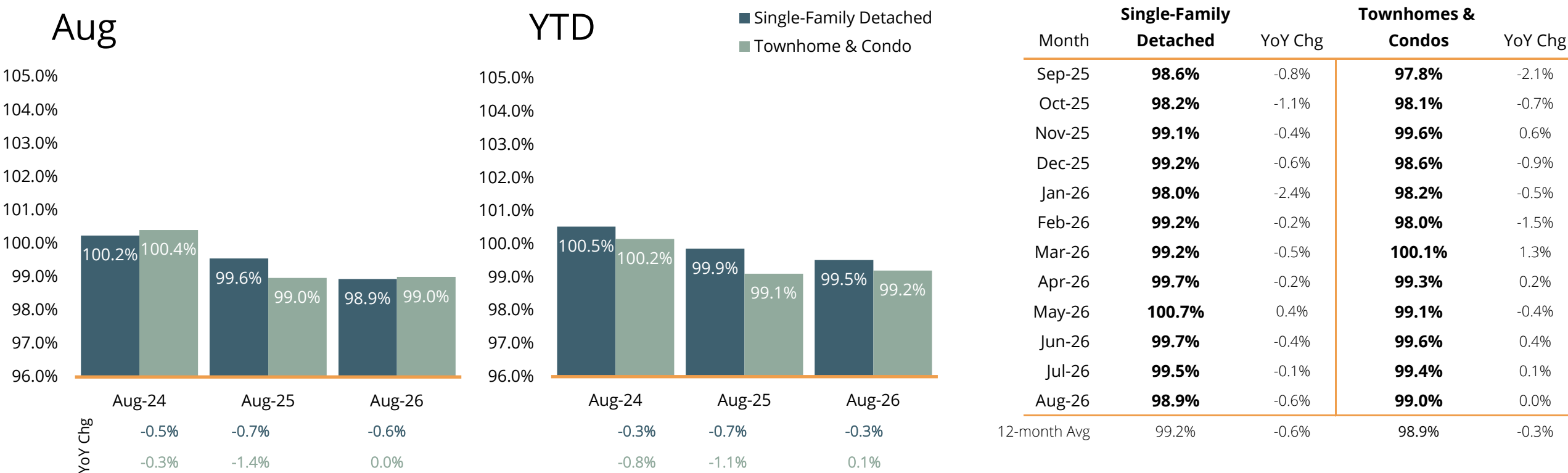
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Sep-25	\$125.0	23.0%	\$23.3	37.7%
Oct-25	\$121.3	5.8%	\$19.6	-1.7%
Nov-25	\$95.5	-12.9%	\$15.9	-19.1%
Dec-25	\$121.7	25.3%	\$20.1	8.1%
Jan-26	\$75.7	16.5%	\$10.6	58.1%
Feb-26	\$64.0	-18.3%	\$12.7	3.4%
Mar-26	\$127.3	30.1%	\$18.0	3.2%
Apr-26	\$138.6	25.7%	\$24.8	40.9%
May-26	\$168.0	15.5%	\$23.7	32.9%
Jun-26	\$215.2	29.5%	\$28.6	13.5%
Jul-26	\$166.7	5.7%	\$24.4	46.6%
Aug-26	\$137.5	10.0%	\$25.6	-13.8%
12-month Avg	\$129.7	13.7%	\$20.6	13.2%

Historical Sold Dollar Volume by Month (in millions)

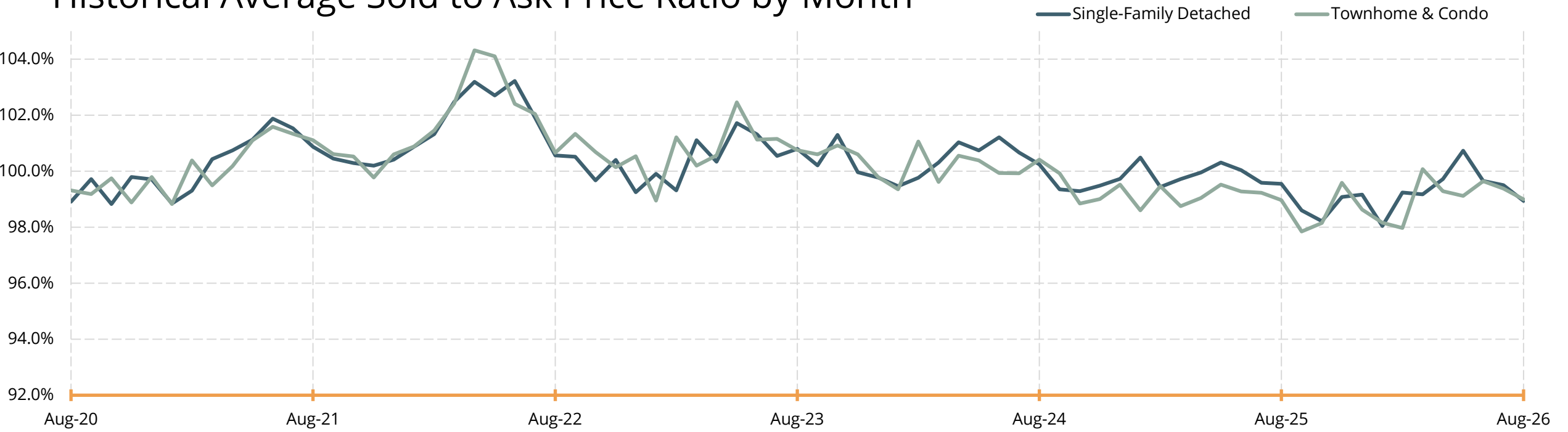


Source: Virginia REALTORS®, data accessed September 15, 2026

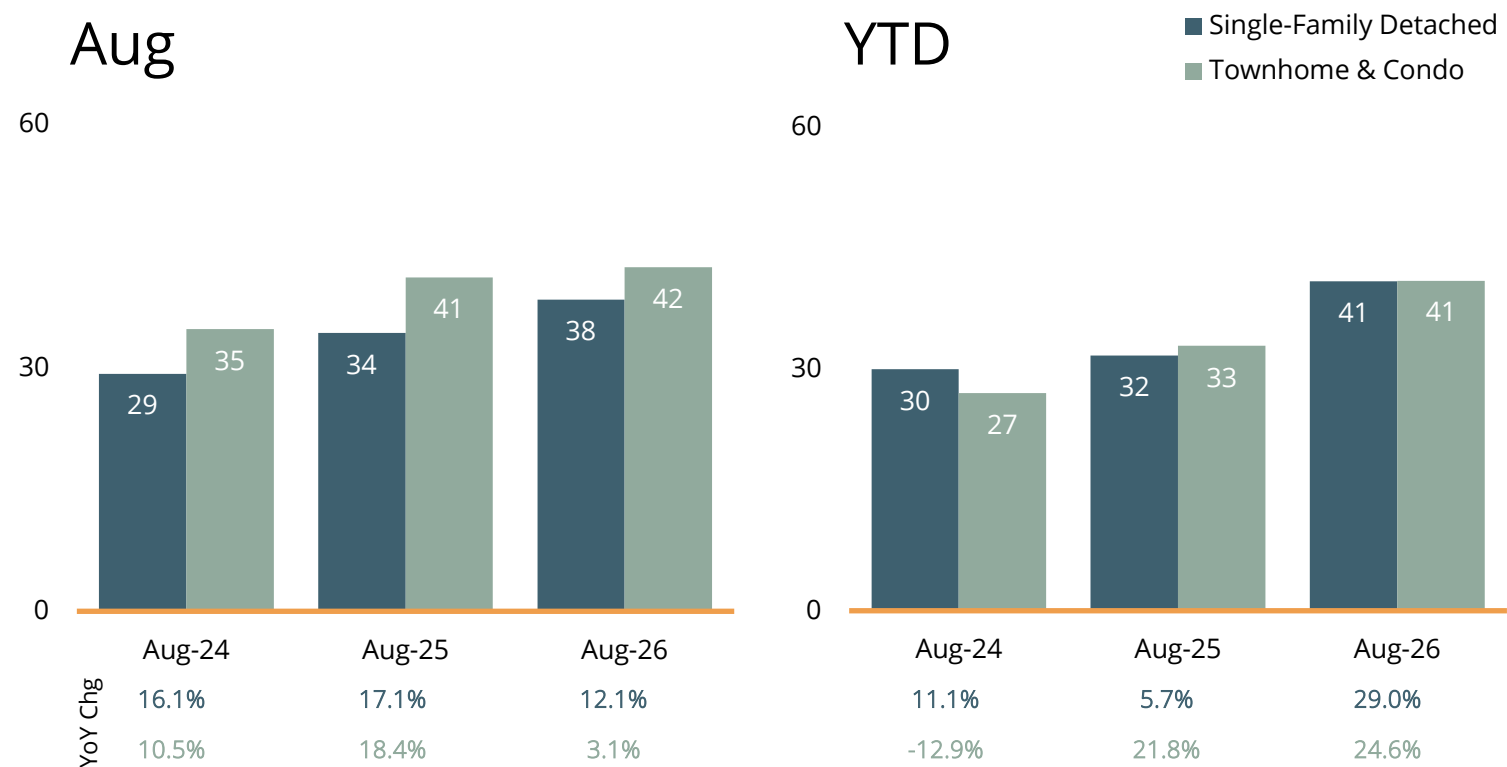
Average Sold to Ask Price Ratio



Historical Average Sold to Ask Price Ratio by Month

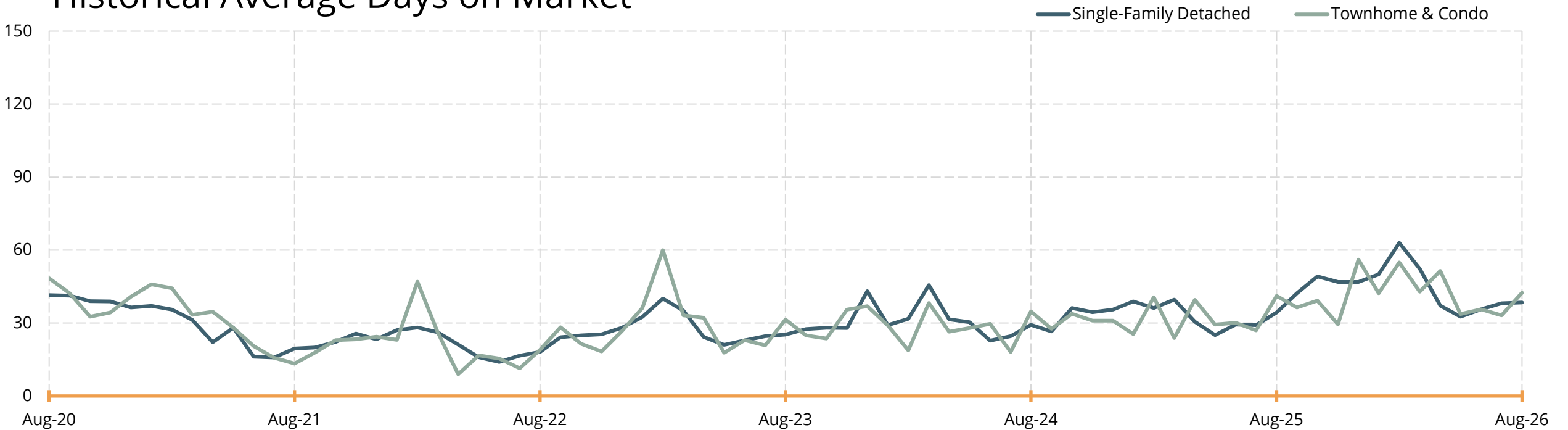


Average Days on Market



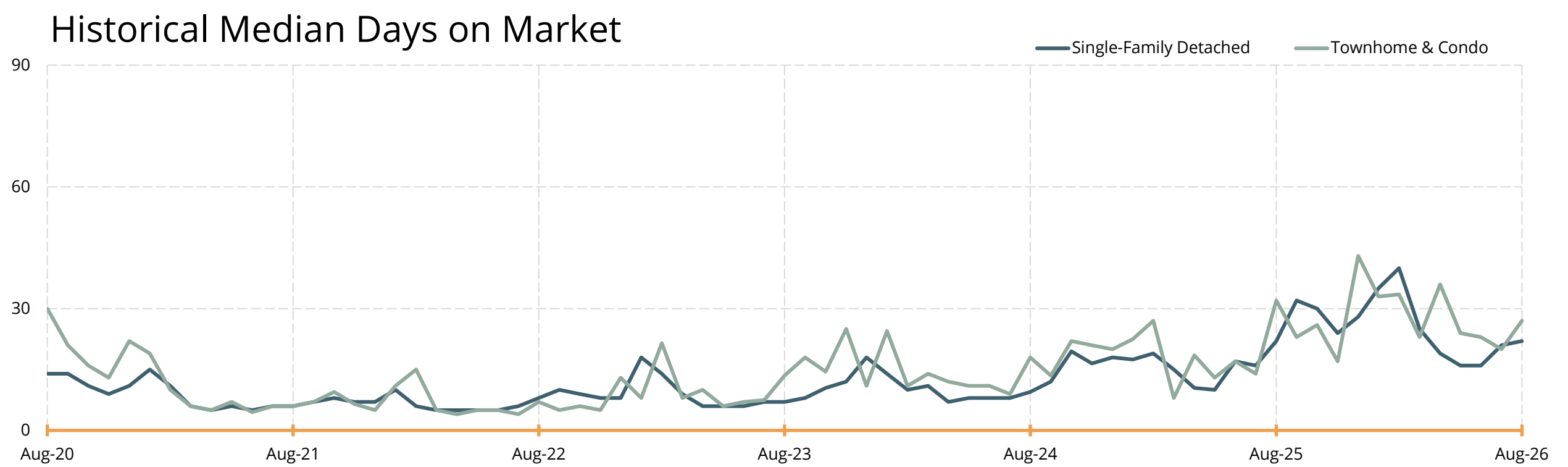
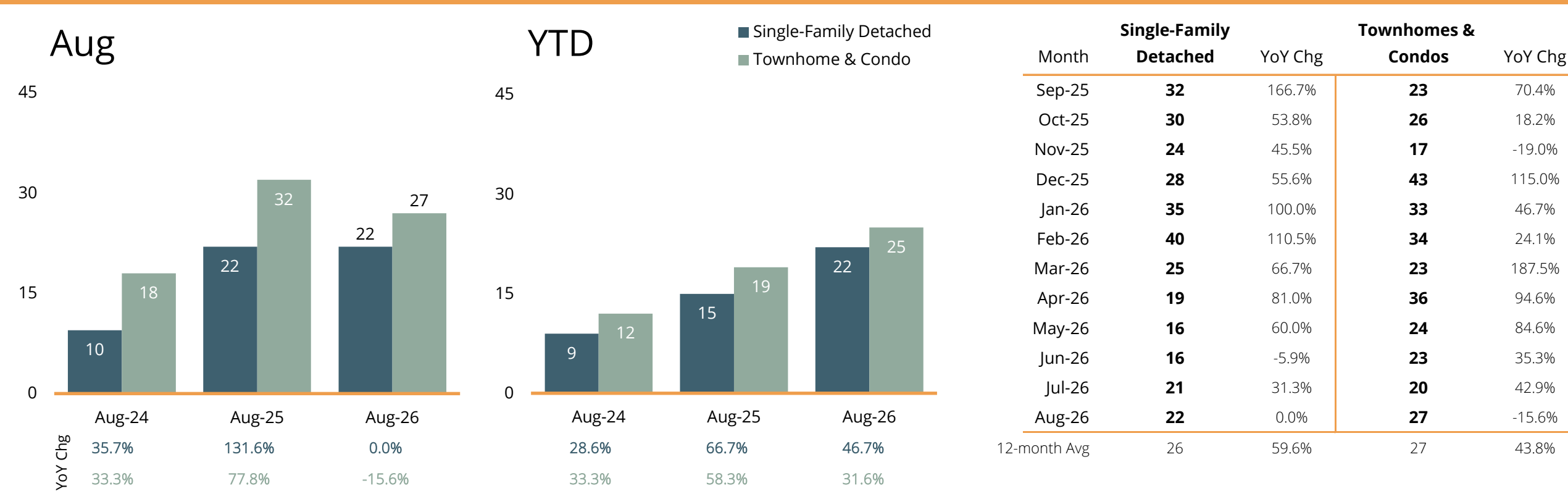
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Sep-25	42	59.4%	36	31.8%
Oct-25	49	35.9%	39	15.9%
Nov-25	47	36.3%	29	-5.1%
Dec-25	47	32.1%	56	81.1%
Jan-26	50	28.7%	42	65.5%
Feb-26	63	74.2%	55	35.1%
Mar-26	52	31.9%	43	80.3%
Apr-26	37	21.7%	51	29.9%
May-26	33	30.3%	34	14.9%
Jun-26	36	21.4%	36	18.6%
Jul-26	38	30.8%	33	22.8%
Aug-26	38	12.1%	42	3.1%
12-month Avg	44	34.6%	41	30.8%

Historical Average Days on Market

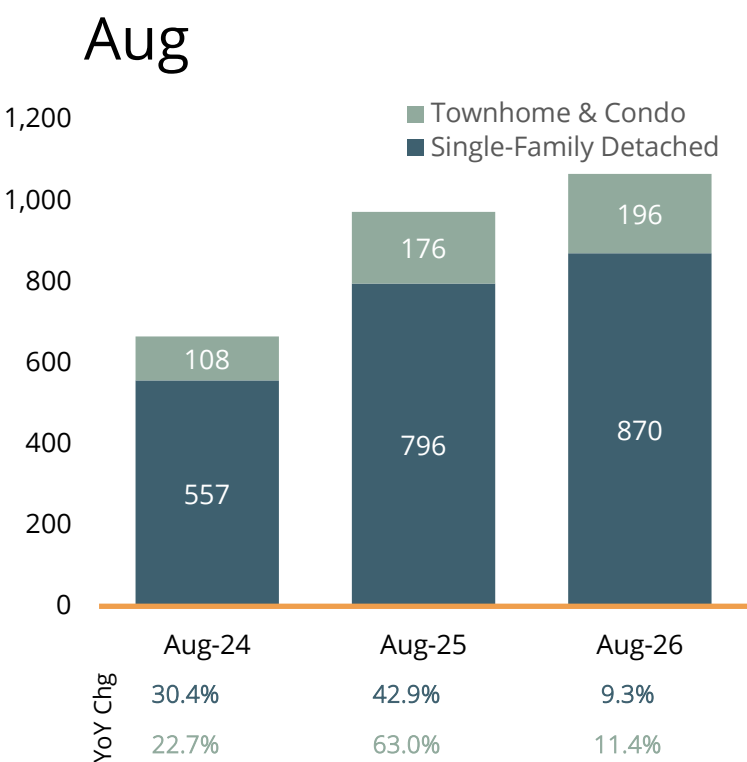


Source: Virginia REALTORS®, data accessed September 15, 2026

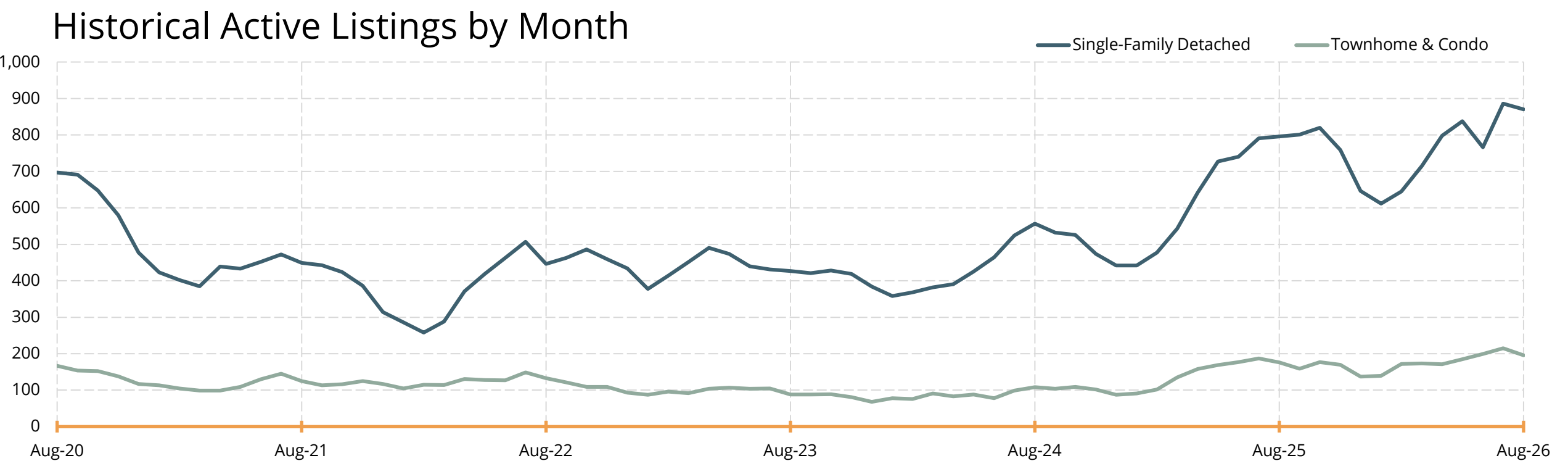
Median Days on Market



Active Listings



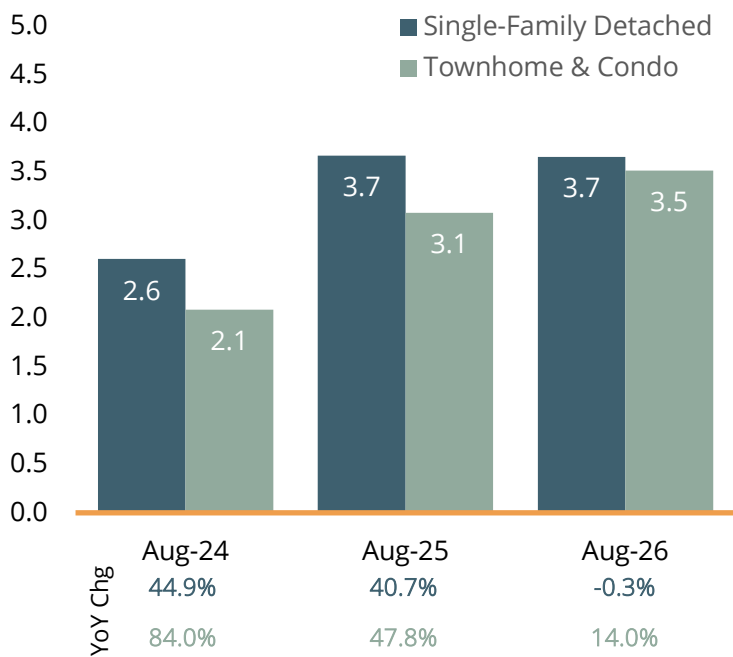
Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
Sep-25	801	50.6%	159	52.9%
Oct-25	820	55.9%	177	62.4%
Nov-25	759	60.1%	170	66.7%
Dec-25	646	46.2%	137	57.5%
Jan-26	612	38.5%	139	52.7%
Feb-26	645	35.2%	172	68.6%
Mar-26	715	31.7%	173	28.1%
Apr-26	798	24.3%	171	8.2%
May-26	838	15.3%	185	9.5%
Jun-26	766	3.5%	199	12.4%
Jul-26	886	12.0%	215	15.0%
Aug-26	870	9.3%	196	11.4%
12-month Avg	763	28.4%	174	31.1%



Months of Supply

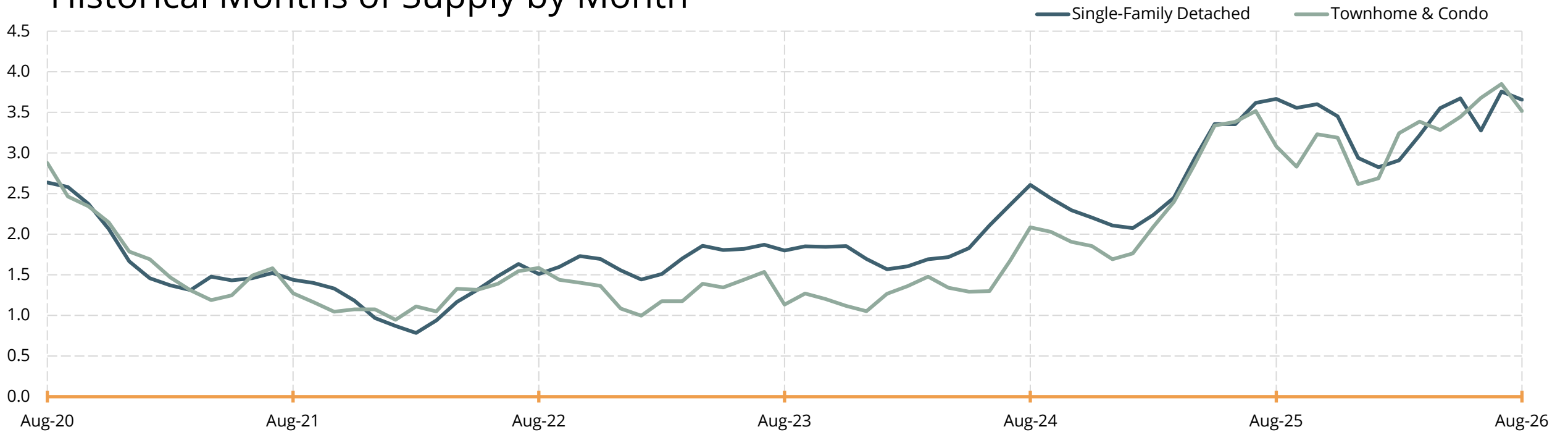


Aug



Month	Single-Family		Townhomes &	
	Detached	YoY Chg	Condos	YoY Chg
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%
Aug-26	3.7	-0.3%	3.5	14.0%
12-month Avg	3.4	23.4%	3.2	30.3%

Historical Months of Supply by Month



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

Area Overview - Total Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg
James City County	166	196	18.1%	159	163	2.5%	\$520,435	\$544,385	4.6%	\$485,000	\$485,000	0.0%	457	540	18.2%	3.6	4.0	12.3%
Williamsburg	37	34	-8.1%	12	29	141.7%	\$569,158	\$401,341	-29.5%	\$561,200	\$362,500	-35.4%	88	66	-25.0%	6.2	3.4	-45.5%
York County	100	131	31.0%	85	86	1.2%	\$493,609	\$452,055	-8.4%	\$445,000	\$440,117	-1.1%	257	263	2.3%	2.8	3.0	5.4%
New Kent County	70	62	-11.4%	44	45	2.3%	\$500,212	\$515,551	3.1%	\$442,500	\$479,000	8.2%	161	189	17.4%	4.2	4.1	-0.6%
Charles City County	5	5	0.0%	4	2	-50.0%	\$275,975	\$307,000	11.2%	\$259,450	\$307,000	18.3%	9	8	-11.1%	2.4	1.8	-25.9%

Area Overview - Total Market YTD



New Listings YTD				Sales YTD			Average Sales Price TYD			Median Sales Price TYD			Active Listings YTD		
Geography	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg
James City County	1,561	1,764	13.0%	1,023	1,147	12.1%	\$535,316	\$544,980	1.8%	\$475,000	\$490,000	3.2%	457	540	18.2%
Williamsburg	218	234	7.3%	113	157	38.9%	\$467,712	\$455,818	-2.5%	\$407,500	\$379,500	-6.9%	88	66	-25.0%
York County	832	993	19.4%	654	719	9.9%	\$483,230	\$492,589	1.9%	\$453,238	\$461,985	1.9%	257	263	2.3%
New Kent County	546	672	23.1%	345	379	9.9%	\$474,616	\$514,990	8.5%	\$444,045	\$470,000	5.8%	161	189	17.4%
Charles City County	42	51	21.4%	33	40	21.2%	\$498,754	\$364,560	-26.9%	\$334,500	\$321,503	-3.9%	9	8	-11.1%

Area Overview - Single Family Detached Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg
James City County	129	141	9.3%	108	130	20.4%	\$567,500	\$588,439	3.7%	\$520,000	\$542,500	4.3%	361	405	12.2%	3.7	3.8	2.8%
Williamsburg	26	25	-3.8%	10	15	50.0%	\$567,370	\$438,393	-22.7%	\$555,600	\$385,000	-30.7%	55	45	-18.2%	6.4	3.7	-41.9%
York County	76	121	59.2%	68	63	-7.4%	\$533,600	\$496,851	-6.9%	\$505,000	\$490,000	-3.0%	220	232	5.5%	2.9	3.3	11.7%
New Kent County	64	58	-9.4%	40	43	7.5%	\$515,783	\$523,486	1.5%	\$459,975	\$480,000	4.4%	151	180	19.2%	4.4	4.2	-5.7%
Charles City County	5	5	0.0%	4	2	-50.0%	\$275,975	\$307,000	11.2%	\$259,450	\$307,000	18.3%	9	8	-11.1%	2.4	1.8	-25.9%

Area Overview - Single Family Detached Market YTD



Geography	New Listings YTD			Sales YTD			Average Sales Price YTD			Median Sales Price YTD			Active Listings YTD		
	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg
James City County	1,253	1,364	8.9%	798	910	14.0%	\$580,210	\$584,761	0.8%	\$525,750	\$530,000	0.8%	361	405	12.2%
Williamsburg	148	147	-0.7%	79	96	21.5%	\$528,792	\$519,423	-1.8%	\$465,000	\$441,900	-5.0%	55	45	-18.2%
York County	697	835	19.8%	542	579	6.8%	\$513,299	\$531,082	3.5%	\$485,600	\$511,695	5.4%	220	232	5.5%
New Kent County	504	633	25.6%	311	358	15.1%	\$490,776	\$525,396	7.1%	\$459,950	\$480,000	4.4%	151	180	19.2%
Charles City County	42	51	21.4%	33	40	21.2%	\$498,754	\$364,560	-26.9%	\$334,500	\$321,503	-3.9%	9	8	-11.1%

Area Overview - Townhome & Condo Market



Geography	New Listings			Sales			Average Sales Price			Median Sales Price			Active Listings			Months Supply		
	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg
James City County	37	55	48.6%	51	33	-35.3%	\$420,766	\$370,839	-11.9%	\$381,165	\$389,000	2.1%	96	135	40.6%	3.2	4.9	53.2%
Williamsburg	11	9	-18.2%	2	14	600.0%	\$578,100	\$361,641	-37.4%	\$578,100	\$350,000	-39.5%	33	21	-36.4%	6.0	2.9	-51.7%
York County	24	10	-58.3%	17	23	35.3%	\$333,641	\$329,353	-1.3%	\$350,000	\$315,000	-10.0%	37	31	-16.2%	2.2	1.7	-22.3%
New Kent County	6	4	-33.3%	4	2	-50.0%	\$344,509	\$344,950	0.1%	\$347,475	\$344,950	-0.7%	10	9	-10.0%	2.0	3.3	63.6%
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	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg	Aug-25	Aug-26	% chg
James City County	308	400	29.9%	225	237	5.3%	\$373,739	\$392,377	5.0%	\$364,000	\$375,000	3.0%	96	135	40.6%
Williamsburg	70	87	24.3%	34	61	79.4%	\$331,179	\$354,675	7.1%	\$306,500	\$359,000	17.1%	33	21	-36.4%
York County	135	158	17.0%	112	140	25.0%	\$328,351	\$332,887	1.4%	\$327,500	\$334,900	2.3%	37	31	-16.2%
New Kent County	42	39	-7.1%	34	21	-38.2%	\$330,102	\$336,109	1.8%	\$326,685	\$324,950	-0.5%	10	9	-10.0%
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.

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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

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.