Virginia REALTORS®

Bristol Tennessee/Virginia Association of REALTORS®

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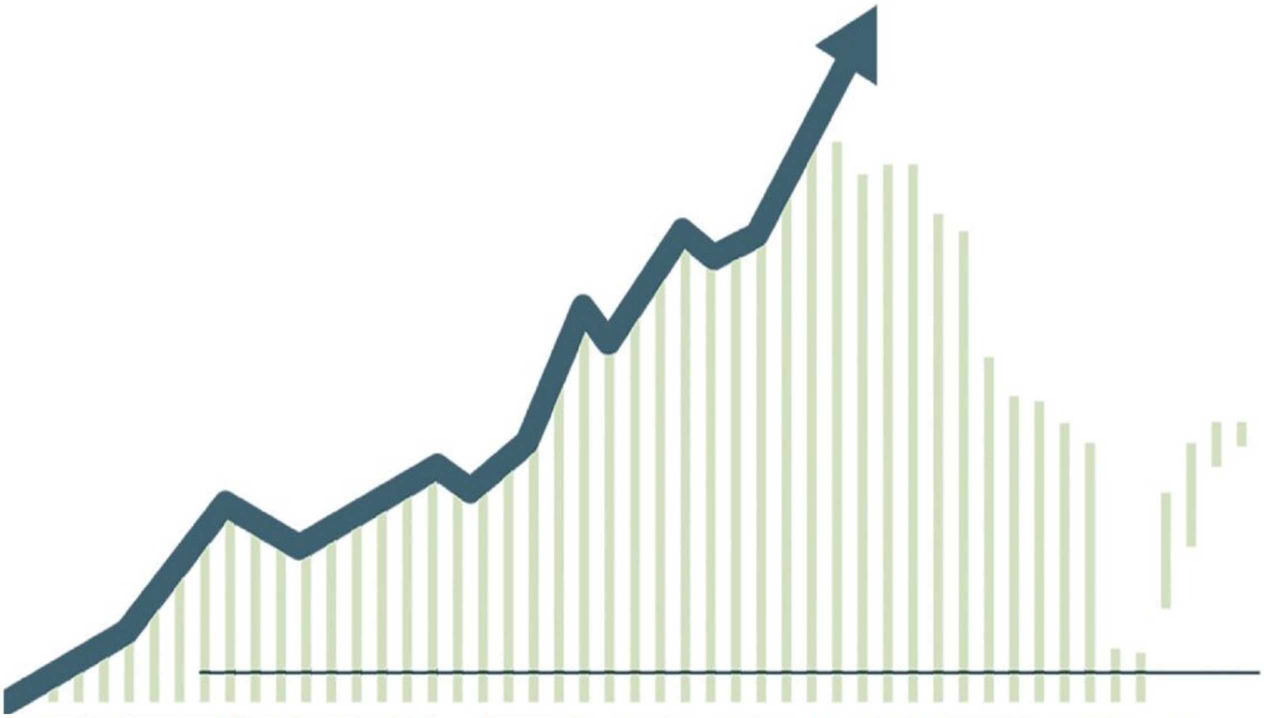


BTVAR BRISTOL
HOUSING MARKET REPORT
Q2-2026

CUSTOM REPORT PREPARED BY
VIRGINIA REALTORS®

BTVAR

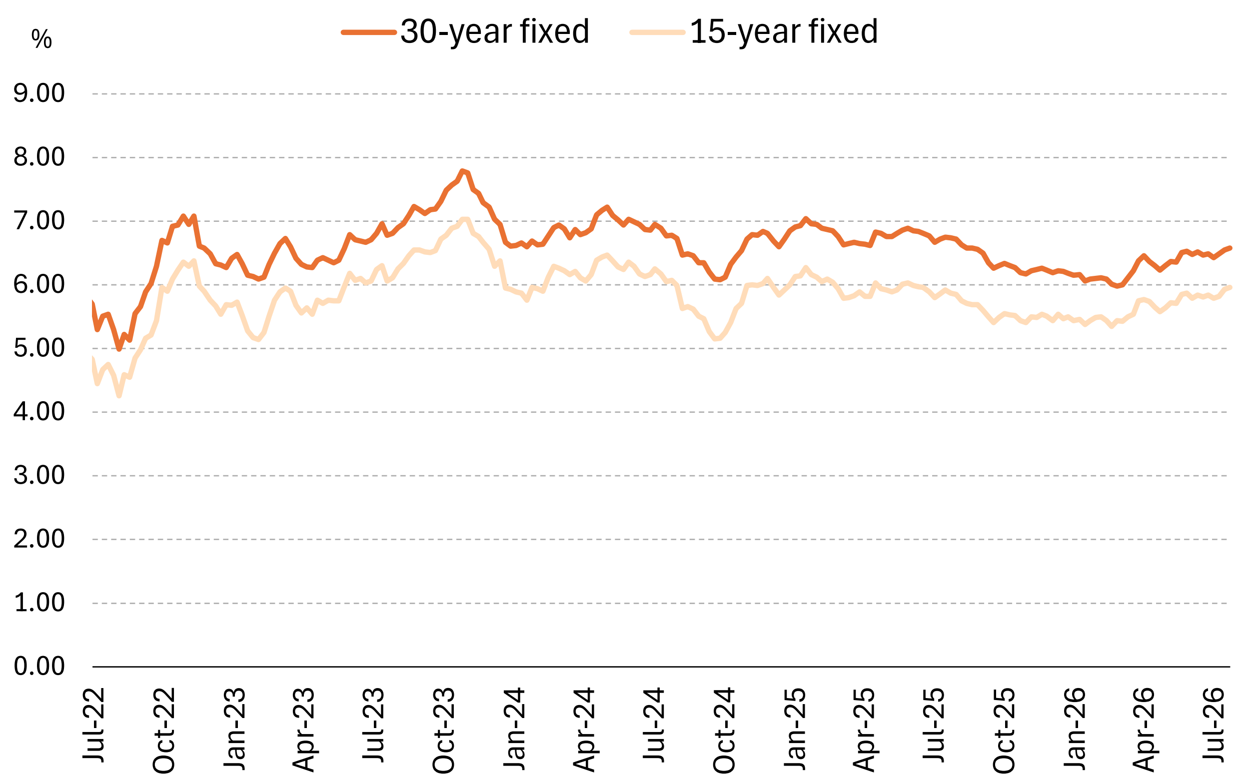
Regional Market Dashboard

BTVAR Footprint	***2026 - Q2***	*2025 - Q2*	*Change*
CLOSED SALES	**184**	174	*5.7%*
PENDING SALES	**237**	188	*26.1%*
MEDIAN SOLD PRICE	**$183,350**	$184,000	*-0.4%*
SOLD DOLLAR VOLUME	**$35.0**	$36.3	*-3.5%*
AVG. SOLD/LIST PRICE RATIO	**94.2%**	94.4%	*-0.2%* (PERCENTAGE POINTS)
MEDIAN DAYS ON MARKET	**73**	70	*3* (DAYS)
ACTIVE LISTINGS	**345**	364	*-5.2%*
MONTHS OF SUPPLY	**6.1**	6.8	*-0.7* (MONTHS)

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

Mortgage Rate Tracker

Weekly Average	***July 23, 2026***	*1 month ago*	*1 year ago*
30-YEAR FIXED MORTGAGE	**6.58%**	6.49%	6.74%
15-YEAR FIXED MORTGAGE	**5.96%**	5.84%	5.87%



Source: Freddie Mac

REPORT INDEX

BTVAR

HOUSING MARKET CONDITIONS

2ND QUARTER

2026

Q2-2026 BTVAR

REGIONAL MARKET SUMMARY

Market Activity: Closed and pending sales increased for the fourth straight quarter, reflecting strong demand in the market. Home sales grew 6% resulting in 184 total sales in the area, 10 more than the year before. All local markets experienced an increase in activity with Scott County (+11%) and Wise County (5%) seeing the biggest gains. There was a jump in pending sales (+26%) this quarter, a sign that future sales will increase over the next few months. Bristol (+37%) and Wise County (+26%) led the region in sales growth.

Price Trends: After increasing at the start of the year, prices inched down across the BTVAR footprint. The median sales price was $183,350 in the second quarter, $650 less than a year ago. Scott County (-14%) and Bristol (-5%) were the two markets with the sharpest decrease in sales price. In Bristol, the median sales price jumped 22% with homes costing $30,000 more compared to the same time last year. Sellers are receiving way below asking price with the sold-to-ask ratio at 94.2%, which is giving buyers more negotiating power.

Inventory Conditions: The decline in active listings led to an overall drop in inventory levels in the BTVAR market. At the end of the second quarter, there were 19 fewer listings, bringing the final listing count to 345 in the area, down 5% from a year earlier. There was listing loss in Wise County (-20%) and Lee County (-31%) while activity improved in Bristol (+26%) and Scott County (+3%). Although supply levels are in a balanced range, the drop from 6.8 months to 6.1 months indicates that conditions are starting to tighten.

Outlook: The 2026 housing market is outpacing the 2025 market so far in the BTVAR region. Higher pending sales activity shows that demand is strong even as interest rates linger in the mid-6% range. This could put upward pressure on home prices in the coming months in some areas. However, based on the months of supply level, falling average sold-to-list price ratio, and rising days on market in the region, buyers' market conditions are likely to persist heading into the summer market.

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REGIONAL MARKET SNAPSHOTS

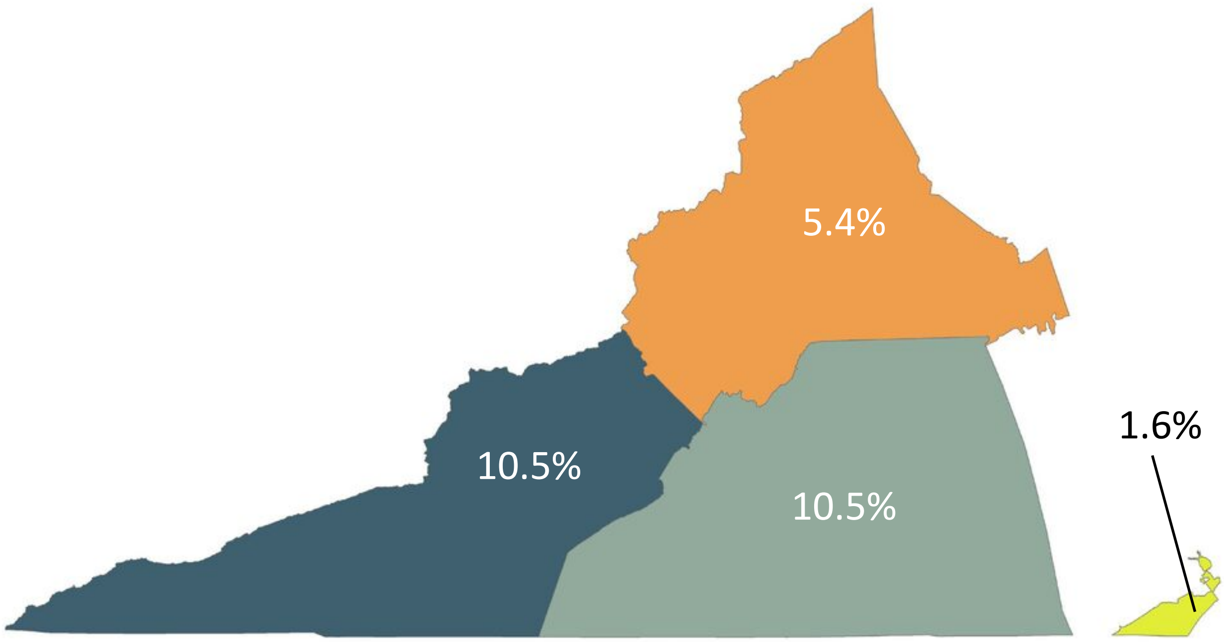
2ND QUARTER

2026

BTVAR Regional Market Snapshot

CLOSED SALES

% change from prior year



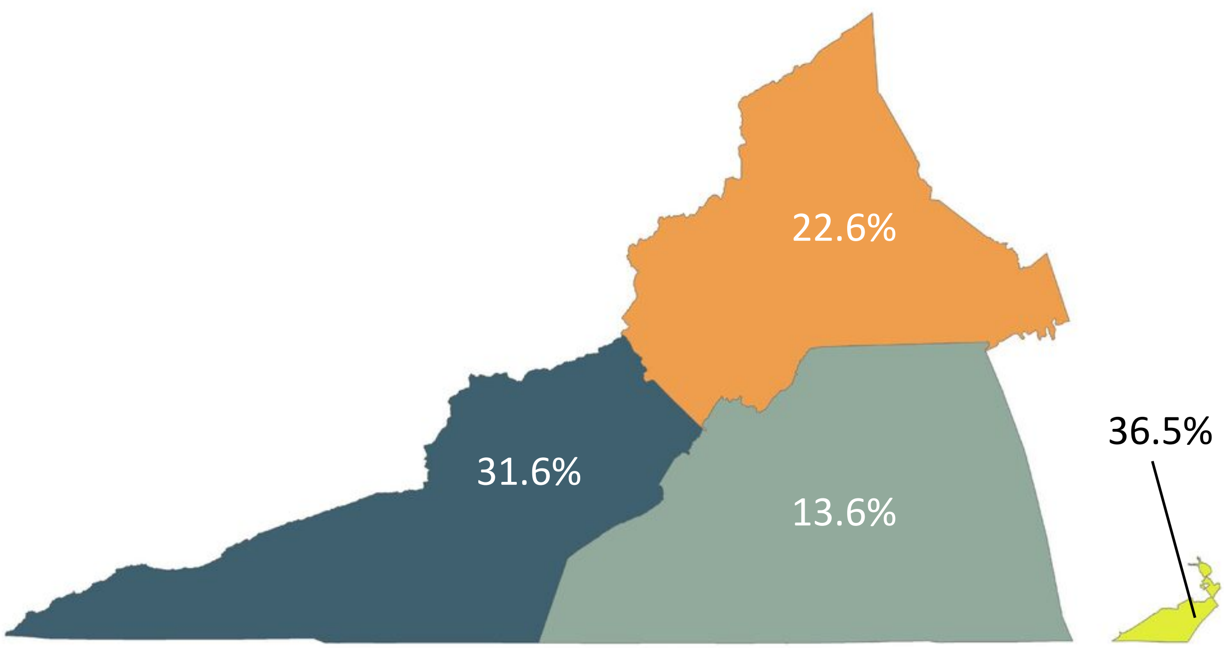
Local Market	***2026 - Q2***	*2025 - Q2*	*% Change*
Bristol	**62**	61	1.6%
Lee County	**21**	19	10.5%
Scott County	**42**	38	10.5%
Wise County	**59**	56	5.4%

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

BTVAR Regional Market Snapshot

PENDING SALES

% change from prior year



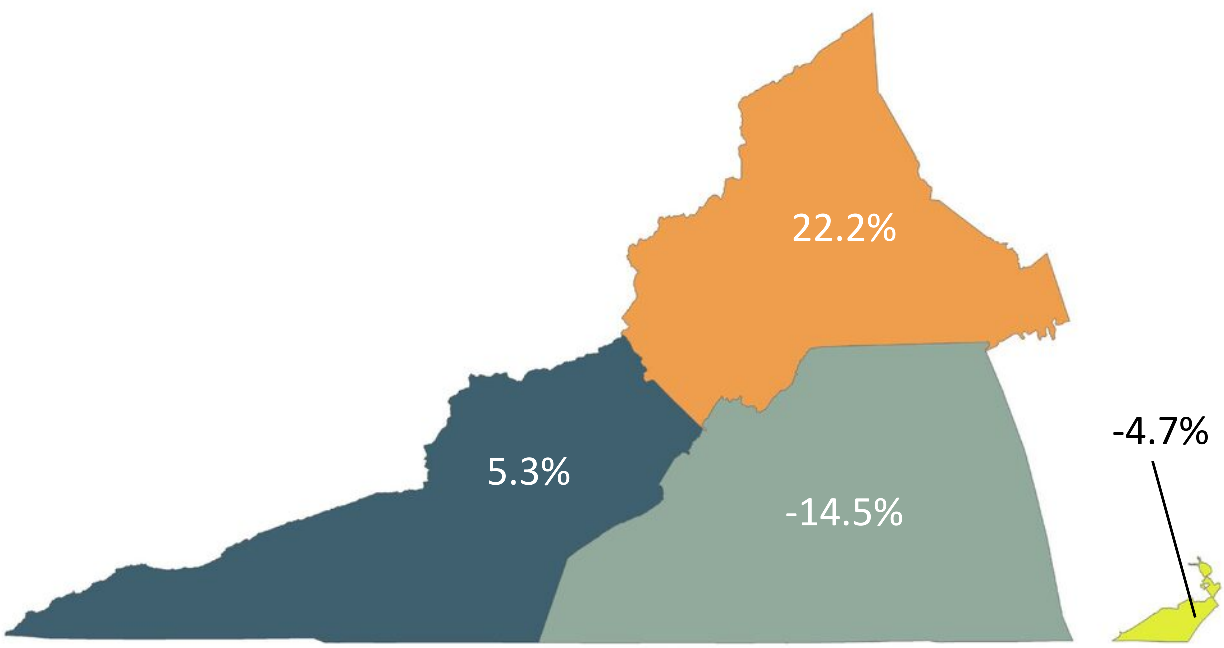
Local Market	***2026 - Q2***	*2025 - Q2*	*% Change*
Bristol	**86**	63	36.5%
Lee County	**25**	19	31.6%
Scott County	**50**	44	13.6%
Wise County	**76**	62	22.6%

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

BTVAR Regional Market Snapshot

MEDIAN SOLD PRICE

% change from prior year



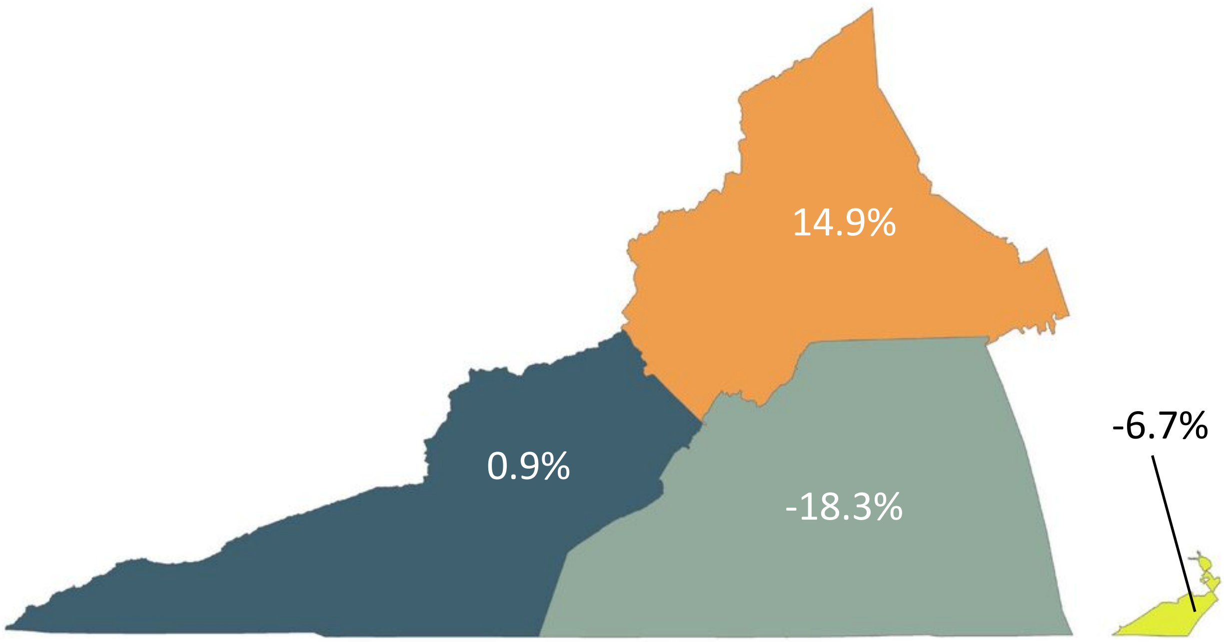
Local Market	***2026 - Q2***	*2025 - Q2*	*% Change*
Bristol	**$205,000**	$215,000	-4.7%
Lee County	**$178,000**	$169,000	5.3%
Scott County	**$177,500**	$207,500	-14.5%
Wise County	**$165,000**	$135,000	22.2%

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

BTVAR Regional Market Snapshot

SOLD DOLLAR VOLUME (in millions)

% change from prior year



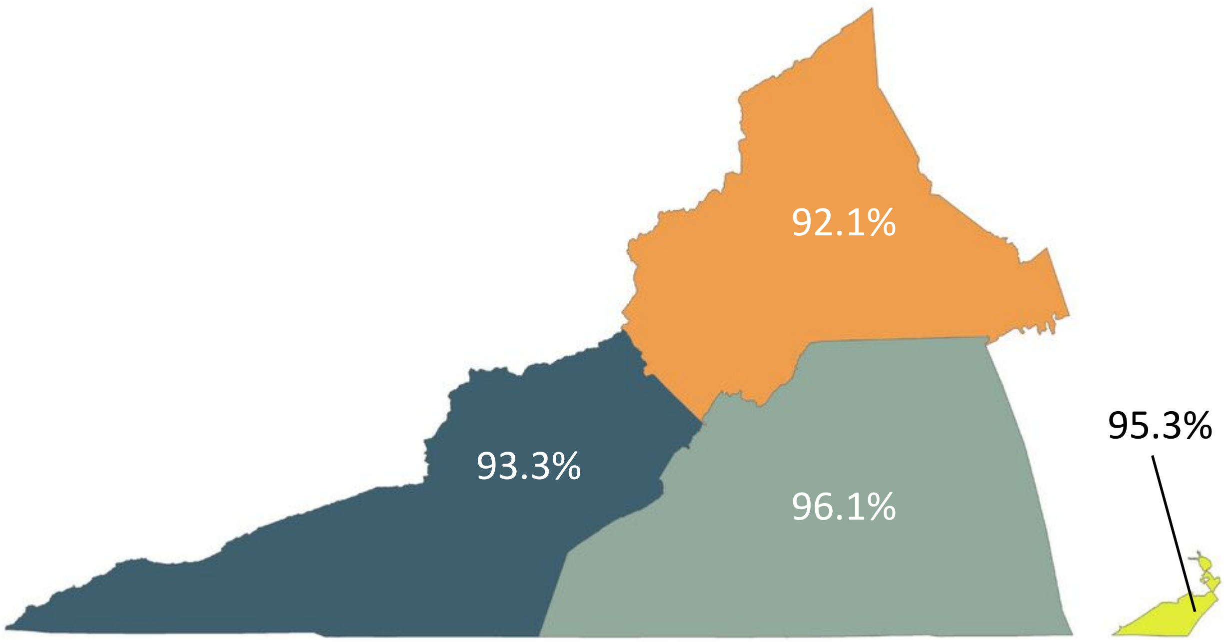
Local Market	***2026 - Q2***	*2025 - Q2*	*% Change*
Bristol	**$12.8**	$13.7	-6.7%
Lee County	**$4.1**	$4.1	0.9%
Scott County	**$7.7**	$9.5	-18.3%
Wise County	**$10.4**	$9.0	14.9%

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

BTVAR Regional Market Snapshot

AVERAGE SOLD-TO-LIST PRICE RATIO

Q2-2026 avg. sold-to-list price ratio

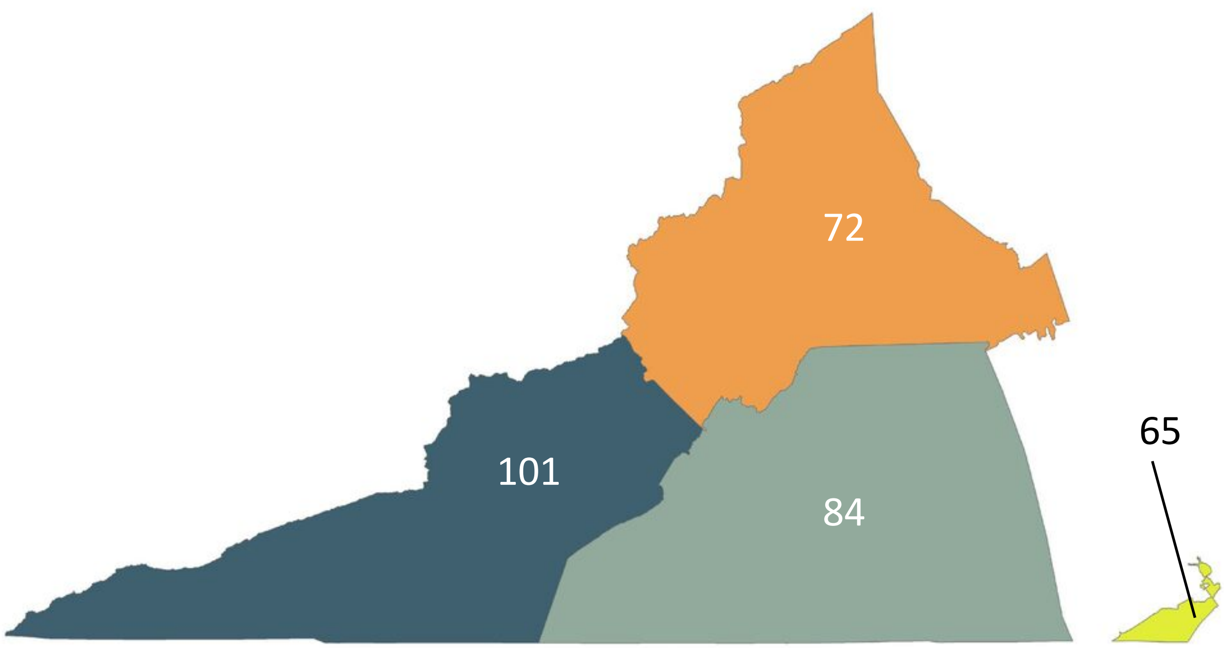


Local Market	***2026 - Q2***	*2025 - Q2*	*Pct. Point Change*
Bristol	**95.3%**	95.7%	-0.4%
Lee County	**93.3%**	92.3%	1.0%
Scott County	**96.1%**	95.5%	0.6%
Wise County	**92.1%**	93.1%	-1.0%

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

BTVAR Regional Market Snapshot

MEDIAN DAYS ON MARKET



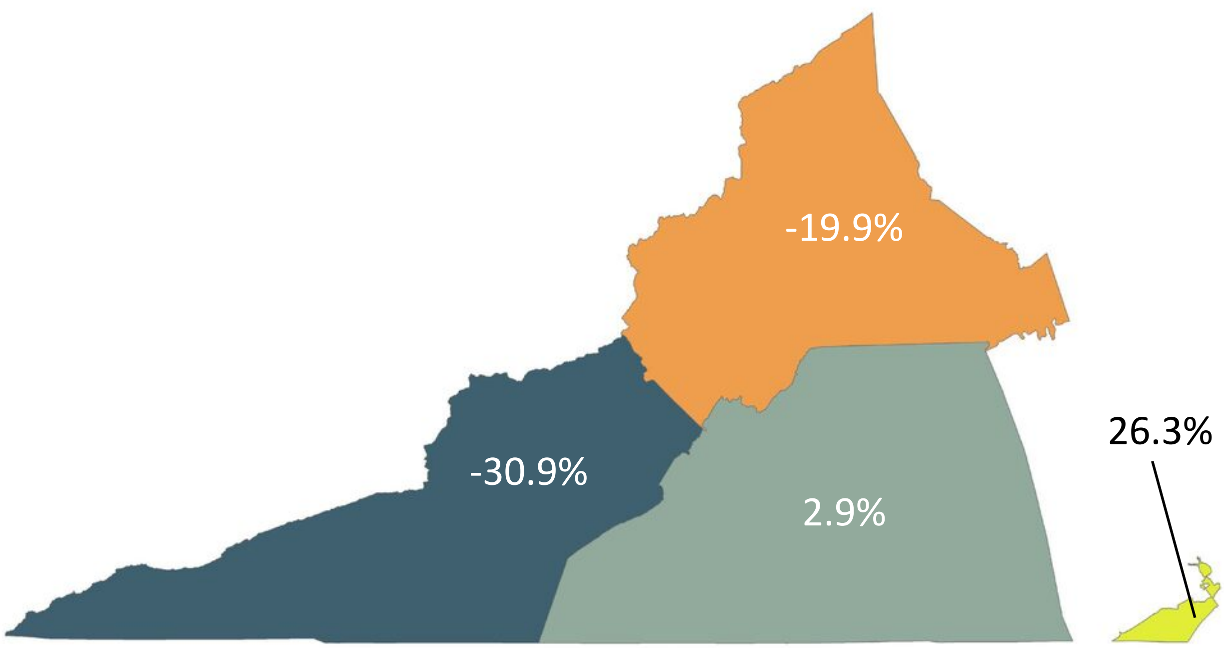
Local Market	***2026 - Q2***	*2025 - Q2*	*Change in Days*
Bristol	**65**	61	4
Lee County	**101**	85	16
Scott County	**84**	98	-14
Wise County	**72**	66	6

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

BTVAR Regional Market Snapshot

ACTIVE LISTINGS

% change from prior year



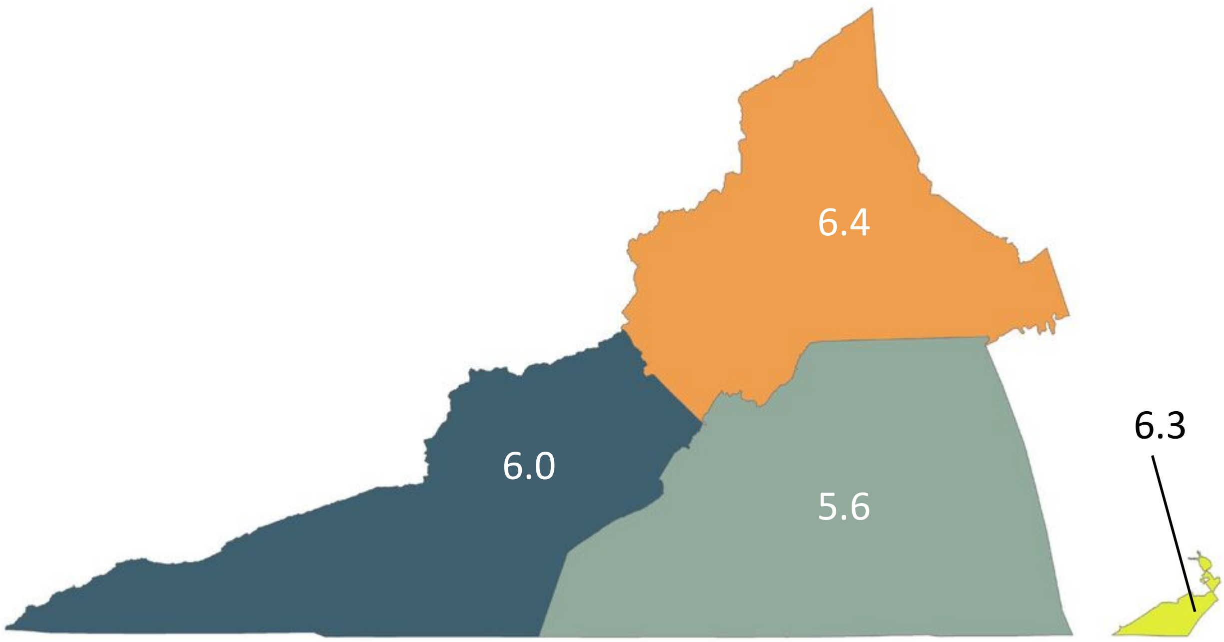
Local Market	***2026 - Q2***	*2025 - Q2*	*% Change*
Bristol	**120**	95	26.3%
Lee County	**38**	55	-30.9%
Scott County	**70**	68	2.9%
Wise County	**117**	146	-19.9%

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

BTVAR Regional Market Snapshot

MONTHS OF SUPPLY

Q2-2026 months of supply



Local Market	***2026 - Q2***	*2025 - Q2*	*Change in Months*
Bristol	**6.3**	4.8	1.5
Lee County	**6.0**	9.0	-3.0
Scott County	**5.6**	5.4	0.2
Wise County	**6.4**	10.0	-3.6

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

BTVAR

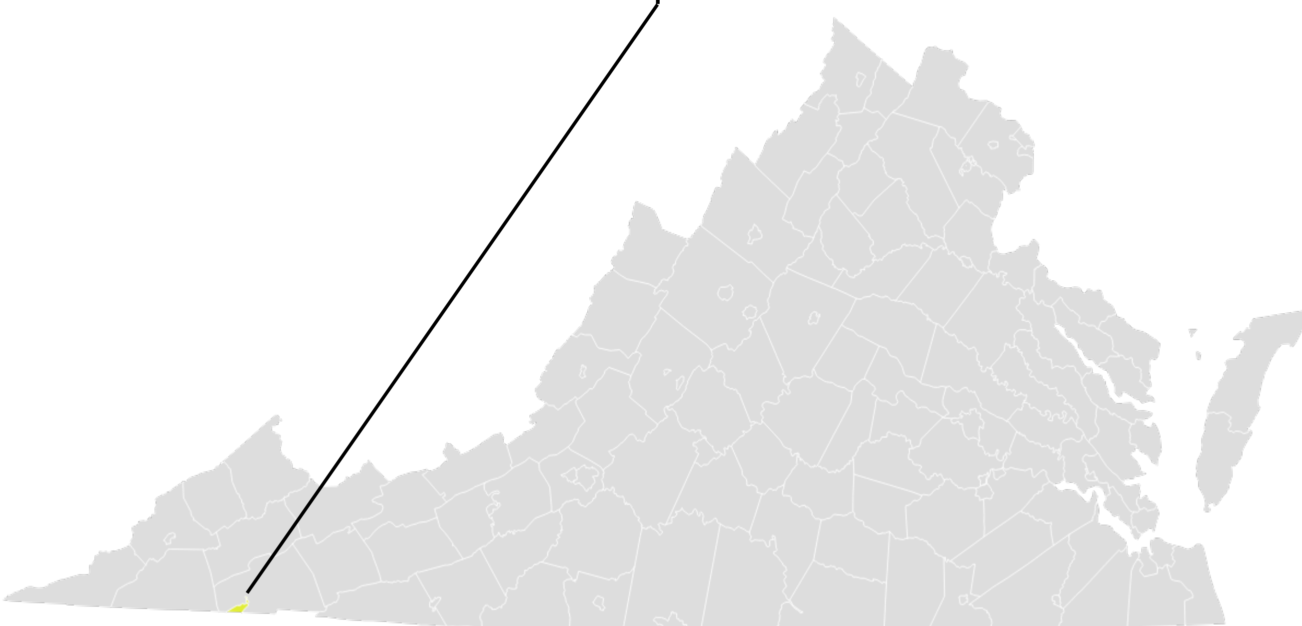
LOCAL MARKET DASHBOARDS

2ND QUARTER

2026

2ND QUARTER 2026 BRISTOL

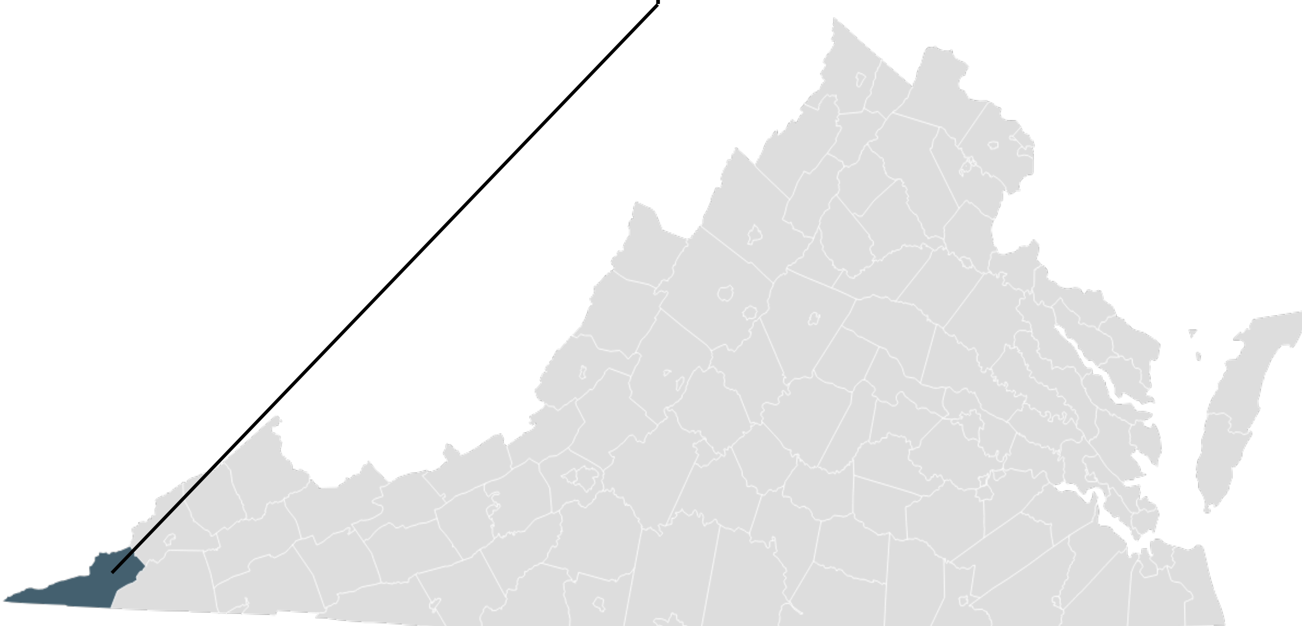
INDICATOR	*CURRENT CONDITIONS* **2026 - Q2**	*2025 - Q2*	*Chg*	*YEAR-TO-DATE CONDITIONS* **2026 YTD**	*2025 YTD*	*Chg*
CLOSED SALES	**62**	61	1.6%	**114**	116	-1.7%
PENDING SALES	**86**	63	36.5%	**142**	127	11.8%
MEDIAN SOLD PRICE ($)	**205,000**	215,000	-4.7%	**205,000**	196,500	4.3%
SOLD VOLUME ($ in Millions)	**12.8**	13.7	-6.7%	**23.9**	25.0	-4.7%
AVG. SOLD/LIST RATIO	**95.3%**	95.7%	-0.4%	**95.0%**	95.8%	-0.8%
MEDIAN DAYS ON MARKET	**65**	61	4	**67**	54	13
ACTIVE LISTINGS	**120**	95	26.3%	**120**	95	26.3%
MONTHS OF SUPPLY	**6.3**	4.8	1.5	**6.3**	4.8	1.5



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

2ND QUARTER 2026 LEE COUNTY

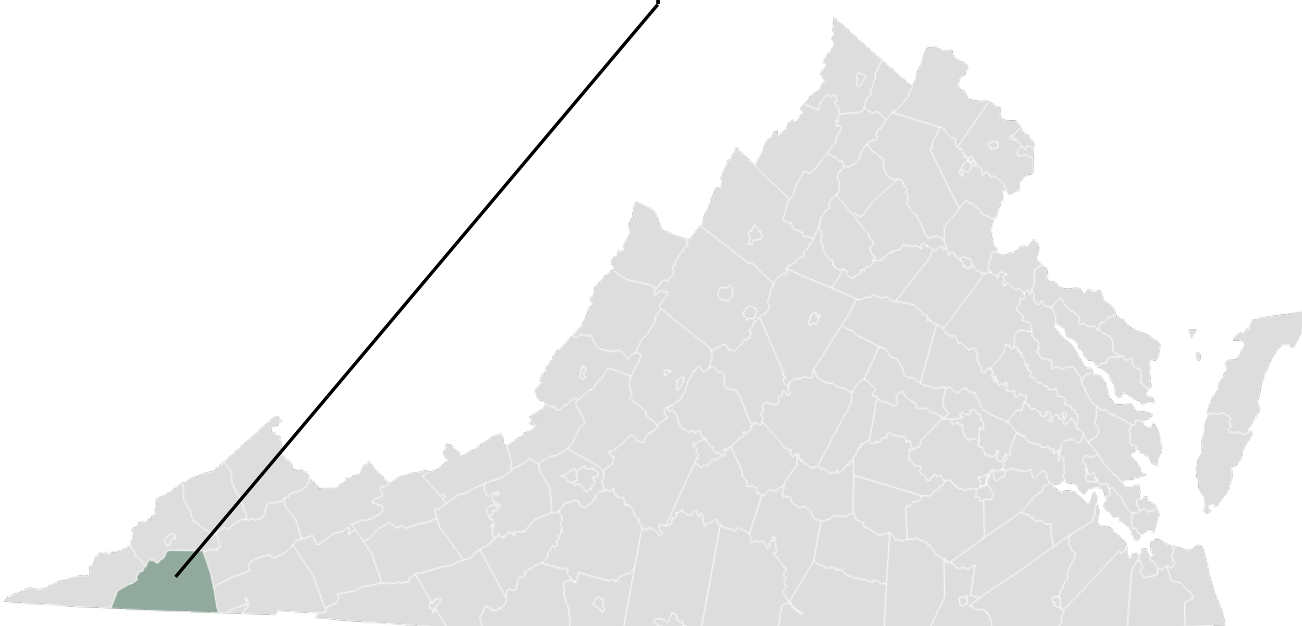
INDICATOR	*CURRENT CONDITIONS* **2026 - Q2**	*2025 - Q2*	*Chg*	*YEAR-TO-DATE CONDITIONS* **2026 YTD**	*2025 YTD*	*Chg*
CLOSED SALES	**21**	19	10.5%	**36**	34	5.9%
PENDING SALES	**25**	19	31.6%	**40**	38	5.3%
MEDIAN SOLD PRICE ($)	**178,000**	169,000	5.3%	**140,200**	160,500	-12.6%
SOLD VOLUME ($ in Millions)	**4.1**	4.1	0.9%	**6.1**	6.7	-8.7%
AVG. SOLD/LIST RATIO	**93.3%**	92.3%	1.0%	**91.2%**	92.6%	-1.5%
MEDIAN DAYS ON MARKET	**101**	85	16	**109**	105	4
ACTIVE LISTINGS	**38**	55	-30.9%	**38**	55	-30.9%
MONTHS OF SUPPLY	**6.0**	9.0	-3.0	**6.0**	9.0	-3.0



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

2ND QUARTER 2026 SCOTT COUNTY

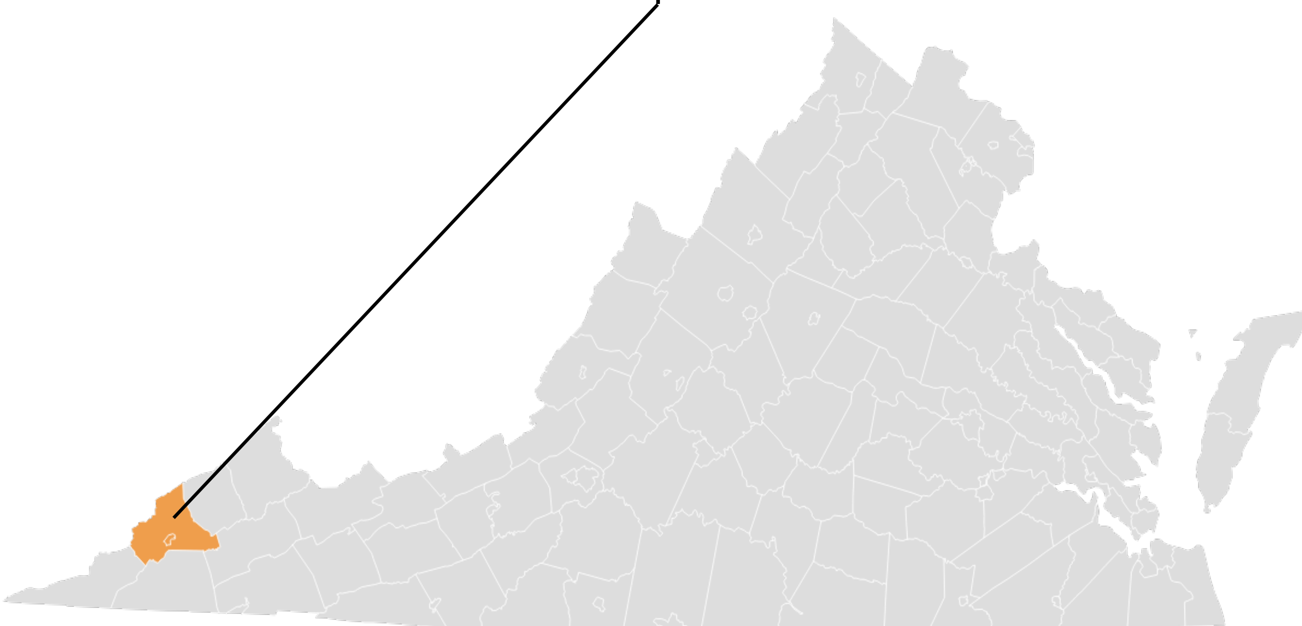
INDICATOR	CURRENT CONDITIONS 2026 - Q2	2025 - Q2	Chg	YEAR-TO-DATE CONDITIONS 2026 YTD	2025 YTD	Chg
CLOSED SALES	**42**	38	10.5%	**73**	69	5.8%
PENDING SALES	**50**	44	13.6%	**90**	75	20.0%
MEDIAN SOLD PRICE ($)	**177,500**	207,500	-14.5%	**185,000**	202,500	-8.6%
SOLD VOLUME ($ in Millions)	**7.7**	9.5	-18.3%	**15.7**	18.8	-16.7%
AVG. SOLD/LIST RATIO	**96.1%**	95.5%	0.6%	**95.0%**	93.8%	1.2%
MEDIAN DAYS ON MARKET	**84**	98	-14	**86**	106	-20
ACTIVE LISTINGS	**70**	68	2.9%	**70**	68	2.9%
MONTHS OF SUPPLY	**5.6**	5.4	0.2	**5.6**	5.4	0.2



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

2ND QUARTER 2026 WISE COUNTY

INDICATOR	CURRENT CONDITIONS 2026 - Q2	2025 - Q2	Chg	YEAR-TO-DATE CONDITIONS 2026 YTD	2025 YTD	Chg
CLOSED SALES	**59**	56	5.4%	**102**	86	18.6%
PENDING SALES	**76**	62	22.6%	**134**	100	34.0%
MEDIAN SOLD PRICE ($)	**165,000**	135,000	22.2%	**150,000**	135,000	11.1%
SOLD VOLUME ($ in Millions)	**10.4**	9.0	14.9%	**17.4**	13.4	29.4%
AVG. SOLD/LIST RATIO	**92.1%**	93.1%	-1.0%	**92.2%**	91.7%	0.5%
MEDIAN DAYS ON MARKET	**72**	66	6	**82**	81	2
ACTIVE LISTINGS	**117**	146	-19.9%	**117**	146	-19.9%
MONTHS OF SUPPLY	**6.4**	10.0	-3.6	**6.4**	10.0	-3.6



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

BTVAR

HISTORICAL MARKET DATA

2ND QUARTER

2020 - 2026

2ND QUARTER HISTORICAL MARKET DATA

CLOSED SALES	2020 - Q2	2021 - Q2	2022 - Q2	2023 - Q2	2024 - Q2	2025 - Q2	2026 - Q2
BTVAR	**168**	**246**	**218**	**182**	**189**	**174**	**184**
Bristol	59	90	73	55	62	61	62
Lee County	12	22	19	20	24	19	21
Scott County	41	56	41	41	42	38	42
Wise County	56	78	85	66	61	56	59

PENDING SALES	2020 - Q2	2021 - Q2	2022 - Q2	2023 - Q2	2024 - Q2	2025 - Q2	2026 - Q2
BTVAR	**181**	**263**	**219**	**197**	**195**	**188**	**237**
Bristol	62	96	78	65	66	63	86
Lee County	14	25	16	17	23	19	25
Scott County	46	56	37	36	46	44	50
Wise County	59	86	88	79	60	62	76

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

2ND QUARTER HISTORICAL MARKET DATA

MEDIAN SOLD PRICE ($)	2020 - Q2	2021 - Q2	2022 - Q2	2023 - Q2	2024 - Q2	2025 - Q2	2026 - Q2
BTVAR	**114,000**	**124,500**	**159,250**	**165,000**	**178,360**	**184,000**	**183,350**
Bristol	115,000	148,500	165,000	210,000	189,450	215,000	205,000
Lee County	81,000	68,450	110,000	131,000	159,950	169,000	178,000
Scott County	115,200	120,000	167,000	168,000	197,000	207,500	177,500
Wise County	97,750	120,000	148,000	112,000	160,000	135,000	165,000

SOLD DOLLAR VOLUME ($ in millions)	2020 - Q2	2021 - Q2	2022 - Q2	2023 - Q2	2024 - Q2	2025 - Q2	2026 - Q2
BTVAR	**21.4**	**34.2**	**38.6**	**33.1**	**37.0**	**36.3**	**35.0**
Bristol	7.1	13.0	12.9	11.8	12.7	13.7	12.8
Lee County	1.2	1.8	2.9	3.2	4.4	4.1	4.1
Scott County	5.5	8.3	8.3	8.5	9.3	9.5	7.7
Wise County	7.6	11.0	14.5	9.5	10.5	9.0	10.4

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

2ND QUARTER HISTORICAL MARKET DATA

AVG SOLD/LIST RATIO	*2020 - Q2*	*2021 - Q2*	*2022 - Q2*	*2023 - Q2*	*2024 - Q2*	*2025 - Q2*	*2026 - Q2*
BTVAR	**93.0%**	**95.6%**	**97.2%**	**94.8%**	**96.3%**	**94.4%**	**94.2%**
Bristol	96.6%	97.2%	100.4%	98.4%	97.2%	95.7%	95.3%
Lee County	94.5%	96.5%	95.1%	95.8%	95.6%	92.3%	93.3%
Scott County	92.6%	96.6%	99.8%	96.4%	97.9%	95.5%	96.1%
Wise County	89.2%	92.9%	93.6%	90.5%	94.4%	93.1%	92.1%

MEDIAN DOM (DAYS)	*2020 - Q2*	*2021 - Q2*	*2022 - Q2*	*2023 - Q2*	*2024 - Q2*	*2025 - Q2*	*2026 - Q2*
BTVAR	**83**	**61**	**53**	**63**	**61**	**70**	**73**
Bristol	55	47	40	50	46	61	65
Lee County	97	80	60	71	78	85	101
Scott County	88	73	53	67	70	98	84
Wise County	131	88	71	76	69	66	72

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

2ND QUARTER HISTORICAL MARKET DATA

ACTIVE LISTINGS (end of quarter)	*2020 - Q2*	*2021 - Q2*	*2022 - Q2*	*2023 - Q2*	*2024 - Q2*	*2025 - Q2*	*2026 - Q2*
BTVAR	**378**	**300**	**278**	**271**	**306**	**364**	**345**
Bristol	69	71	71	73	82	95	120
Lee County	47	27	33	42	49	55	38
Scott County	80	58	47	47	77	68	70
Wise County	182	144	127	109	98	146	117

MONTHS OF SUPPLY	*2020 - Q2*	*2021 - Q2*	*2022 - Q2*	*2023 - Q2*	*2024 - Q2*	*2025 - Q2*	*2026 - Q2*
BTVAR	**6.9**	**4.5**	**3.9**	**4.4**	**5.2**	**6.8**	**6.1**
Bristol	3.2	2.9	2.7	3.3	3.9	4.8	6.3
Lee County	11.5	4.8	5.5	7.0	7.8	9.0	6.0
Scott County	7.1	4.0	3.4	4.0	6.4	5.4	5.6
Wise County	10.0	6.5	5.1	5.0	5.0	10.0	6.4

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

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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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.