Monthly Indicators

October 2025

U.S. existing-home sales climbed 1.5% month-over-month and 4.1% year-over-year, reaching a seasonally adjusted annual rate of 4.06 million units, according to the National Association of REALTORS® (NAR). The increase was partly driven by falling mortgage rates, which recently hit their lowest level in more than a year. Regionally, monthly sales advanced in the Northeast, South, and West, while the Midwest experienced a slight decline.

New Listings were up 2.5 percent to 605. Pending Sales increased 11.1 percent to 459. Inventory grew 15.3 percent to 2,012 units.

Prices moved lower as Median Sales Price was down 7.3 percent to $518,995. Days on Market increased 104.9 percent to 125 days. Months Supply of Inventory was up 9.8 percent to 4.5 months.

Housing inventory edged up 1.3% from the previous month to 1.55 million units, 14.0% higher than the same period last year. This represents a 4.6-month supply at the current sales pace, according to NAR. The median existing-home price grew 2.1% year-over-year to $415,200, continuing the trend of annual price gains. The Midwest saw the largest year-over-year increase in median sales price, followed by the Northeast and South, while prices remained mostly flat in the West.

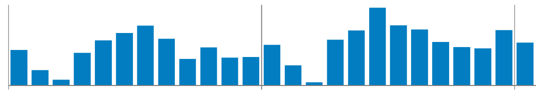
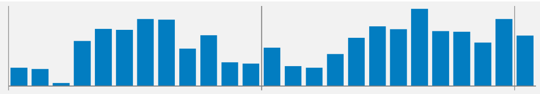
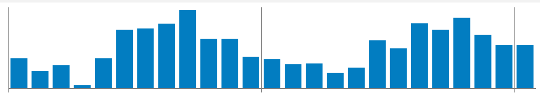
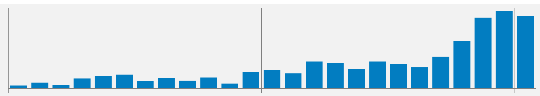
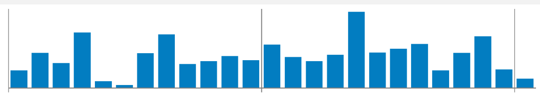
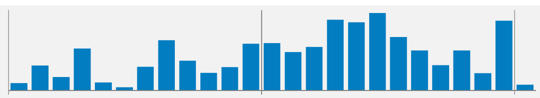
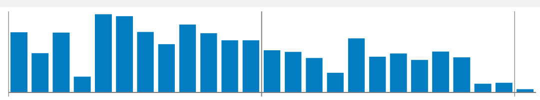
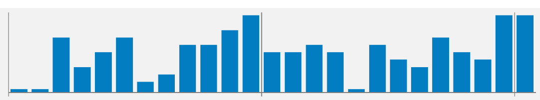
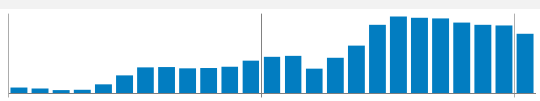
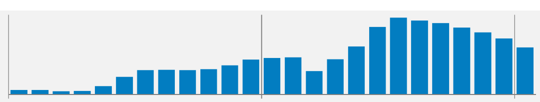
Quick Facts

+ 12.6%	- 7.3%	+ 9.8%
One-Year Change in **Closed Sales**	One-Year Change in **Median Sales Price**	One-Year Change in **Months Supply**

A research tool provided by the Hilton Head Association of REALTORS®. Percent changes are calculated using rounded figures.

Market Overview

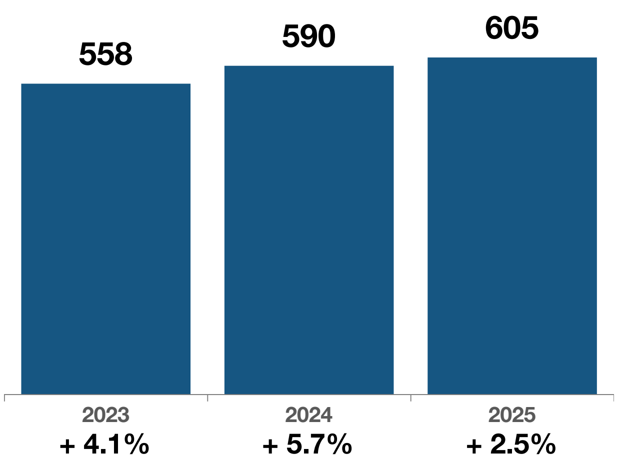
Key market metrics for the current month and year-to-date figures.

Key Metrics	Historical Sparkbars	10-2024	10-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		590	**605**	+ 2.5%	5,861	**6,574**	+ 12.2%
Pending Sales		413	**459**	+ 11.1%	4,441	**4,744**	+ 6.8%
Closed Sales		405	**456**	+ 12.6%	4,640	**4,652**	+ 0.3%
Days on Market		61	**125**	+ 104.9%	52	**89**	+ 71.2%
Median Sales Price		$560,000	**$518,995**	- 7.3%	$542,500	**$549,999**	+ 1.4%
Average Sales Price		$791,894	**$701,116**	- 11.5%	$750,912	**$787,312**	+ 4.8%
Pct. of List Price Received		97.6%	**96.9%**	- 0.7%	97.8%	**97.3%**	- 0.5%
Housing Affordability Index		59	**64**	+ 8.5%	61	**61**	0.0%
Inventory of Homes for Sale		1,745	**2,012**	+ 15.3%	--	**--**	--
Months Supply of Inventory		4.1	**4.5**	+ 9.8%	--	**--**	--

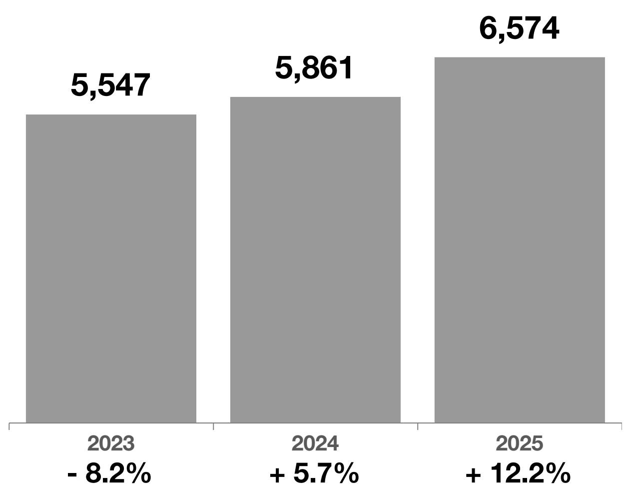
New Listings

A count of the properties that have been newly listed on the market in a given month.

October

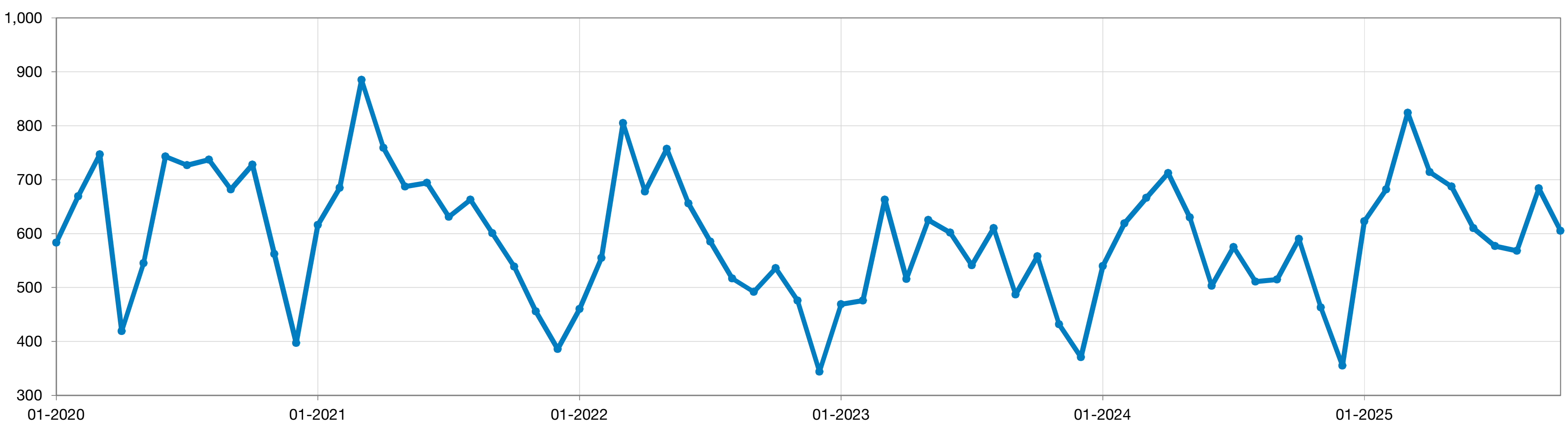


Year to Date



New Listings		Prior Year	Percent Change
November 2024	463	432	+7.2%
December 2024	355	371	-4.3%
January 2025	623	540	+15.4%
February 2025	682	619	+10.2%
March 2025	824	666	+23.7%
April 2025	714	712	+0.3%
May 2025	687	630	+9.0%
June 2025	610	503	+21.3%
July 2025	577	575	+0.3%
August 2025	568	511	+11.2%
September 2025	684	515	+32.8%
October 2025	**605**	**590**	**+2.5%**
12-Month Avg	616	555	+10.9%

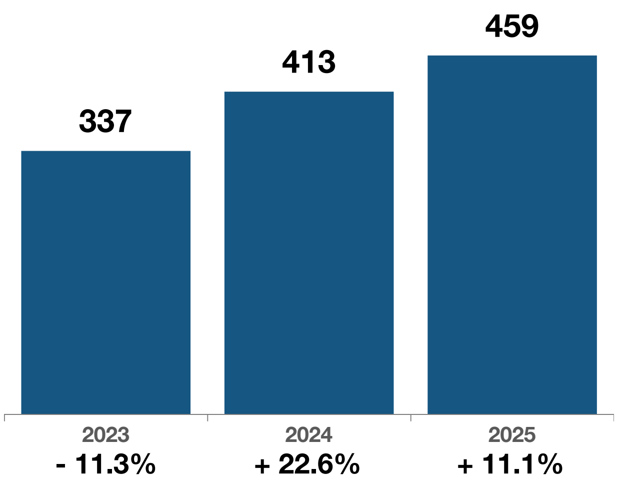
Historical New Listings by Month



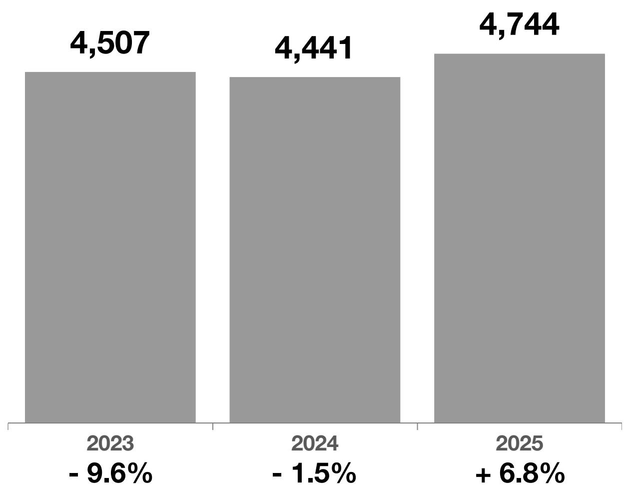
Pending Sales

A count of the properties on which offers have been accepted in a given month.

October

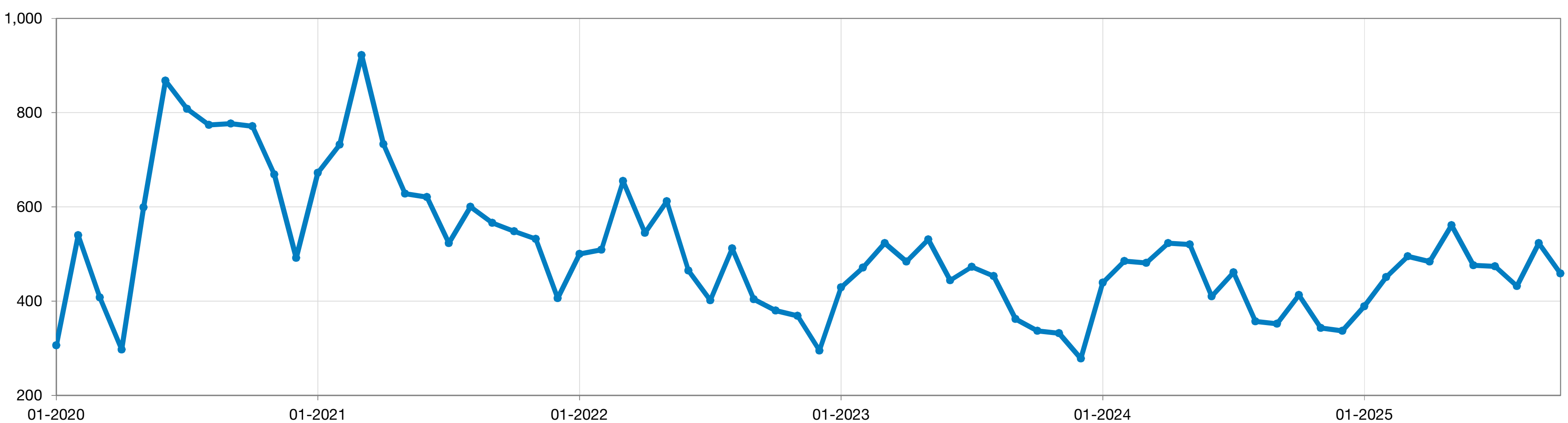


Year to Date



Pending Sales		Prior Year	Percent Change
November 2024	343	332	+3.3%
December 2024	337	278	+21.2%
January 2025	389	439	-11.4%
February 2025	451	485	-7.0%
March 2025	495	481	+2.9%
April 2025	484	523	-7.5%
May 2025	561	520	+7.9%
June 2025	476	410	+16.1%
July 2025	474	461	+2.8%
August 2025	432	357	+21.0%
September 2025	523	352	+48.6%
October 2025	**459**	**413**	**+11.1%**
12-Month Avg	452	421	+7.4%

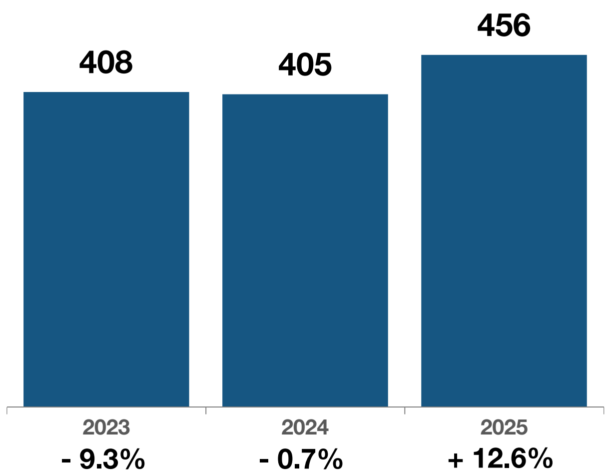
Historical Pending Sales by Month



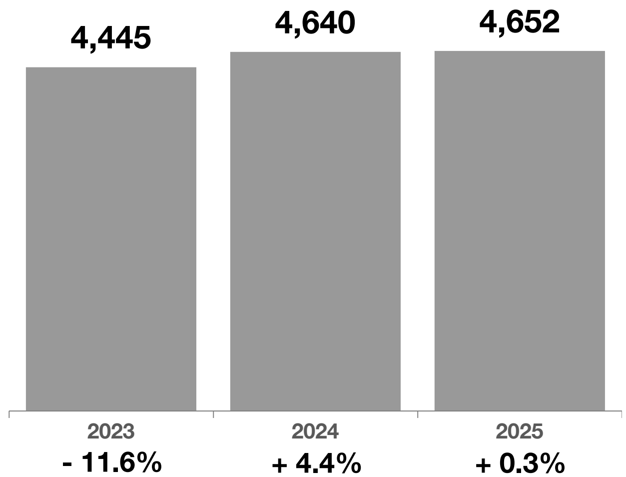
Closed Sales

A count of the actual sales that closed in a given month.

October

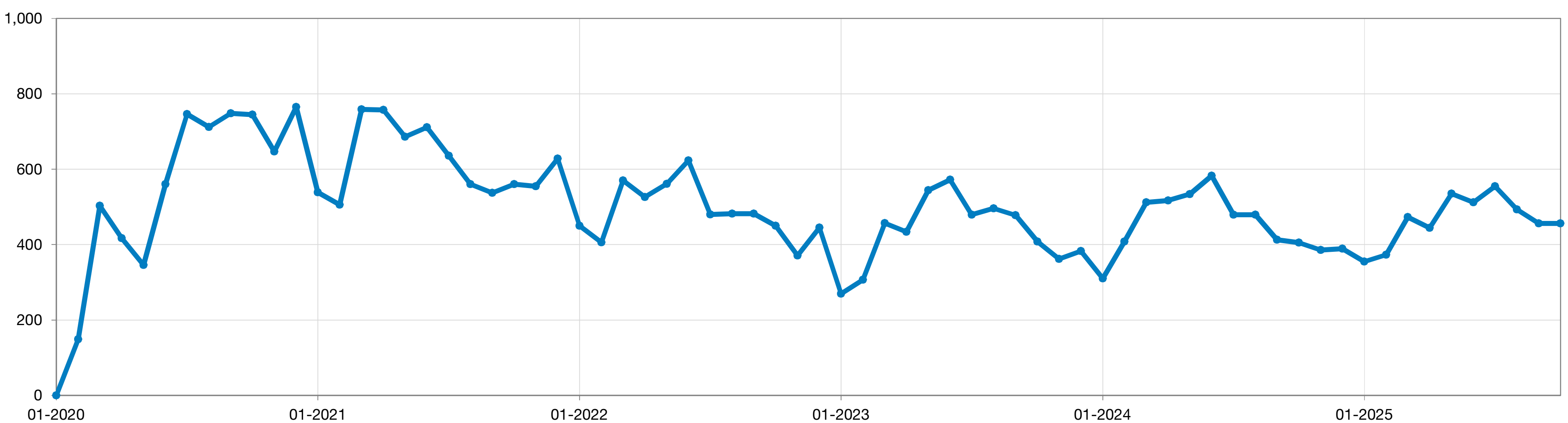


Year to Date



Closed Sales		Prior Year	Percent Change
November 2024	386	362	+6.6%
December 2024	389	383	+1.6%
January 2025	355	310	+14.5%
February 2025	373	408	-8.6%
March 2025	473	512	-7.6%
April 2025	444	517	-14.1%
May 2025	535	534	+0.2%
June 2025	512	583	-12.2%
July 2025	555	479	+15.9%
August 2025	493	479	+2.9%
September 2025	456	413	+10.4%
October 2025	**456**	**405**	**+12.6%**
12-Month Avg	452	449	+0.8%

Historical Closed Sales by Month



Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given month.

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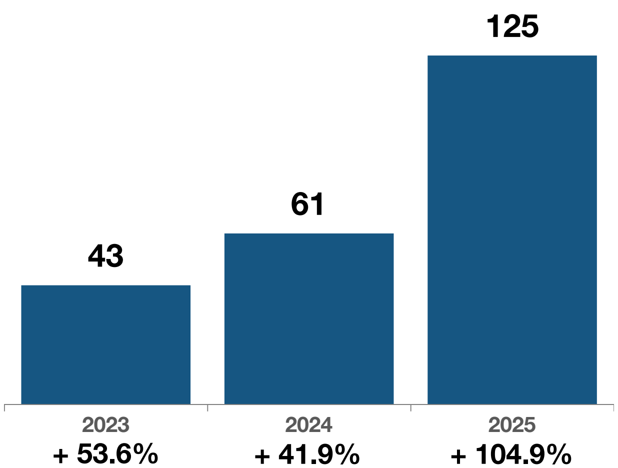
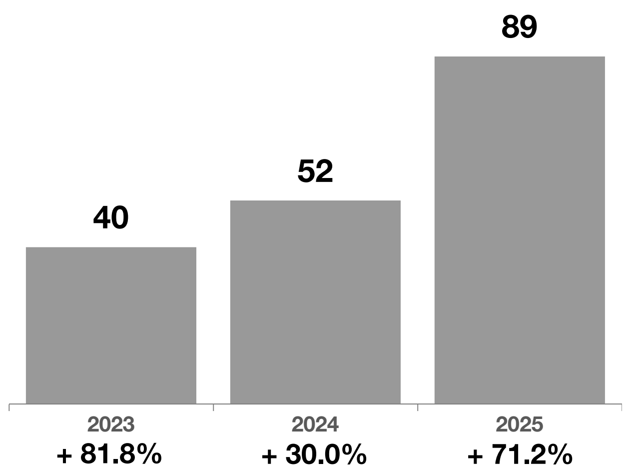
October



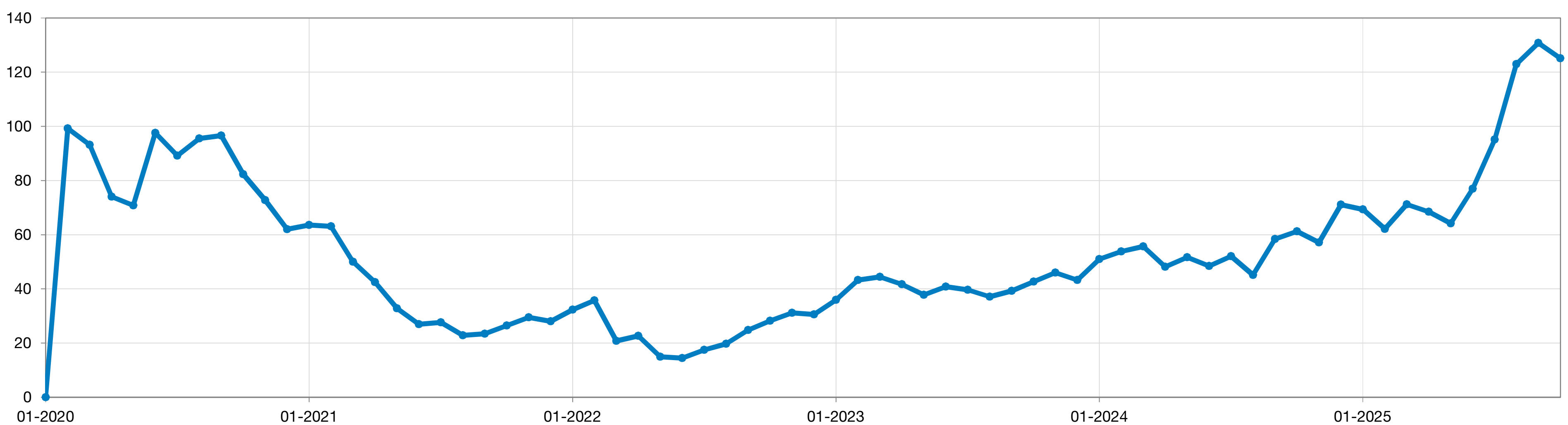
Year to Date



Days on Market		Prior Year	Percent Change
November 2024	57	46	+23.9%
December 2024	71	43	+65.1%
January 2025	69	51	+35.3%
February 2025	62	54	+14.8%
March 2025	71	56	+26.8%
April 2025	69	48	+43.8%
May 2025	64	52	+23.1%
June 2025	77	48	+60.4%
July 2025	95	52	+82.7%
August 2025	123	45	+173.3%
September 2025	131	58	+125.9%
October 2025	**125**	**61**	**+104.9%**
12-Month Avg*	86	51	+68.6%

* Average Days on Market of all properties from November 2024 through October 2025. This is not the average of the individual figures above.

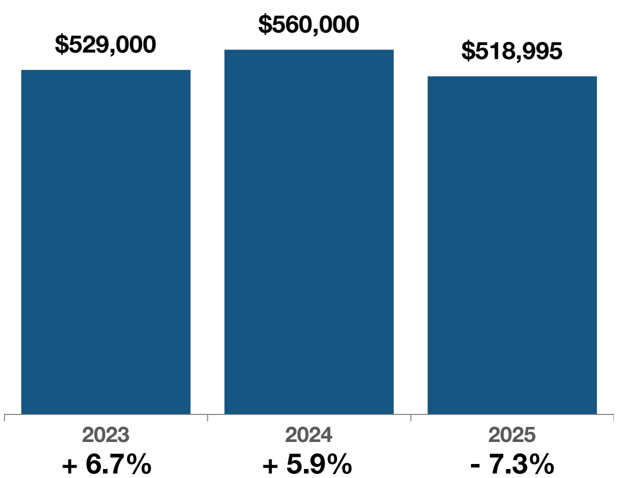
Historical Days on Market Until Sale by Month



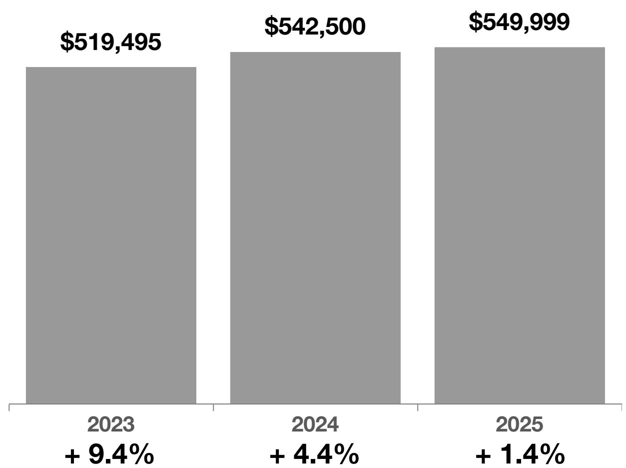
Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

October



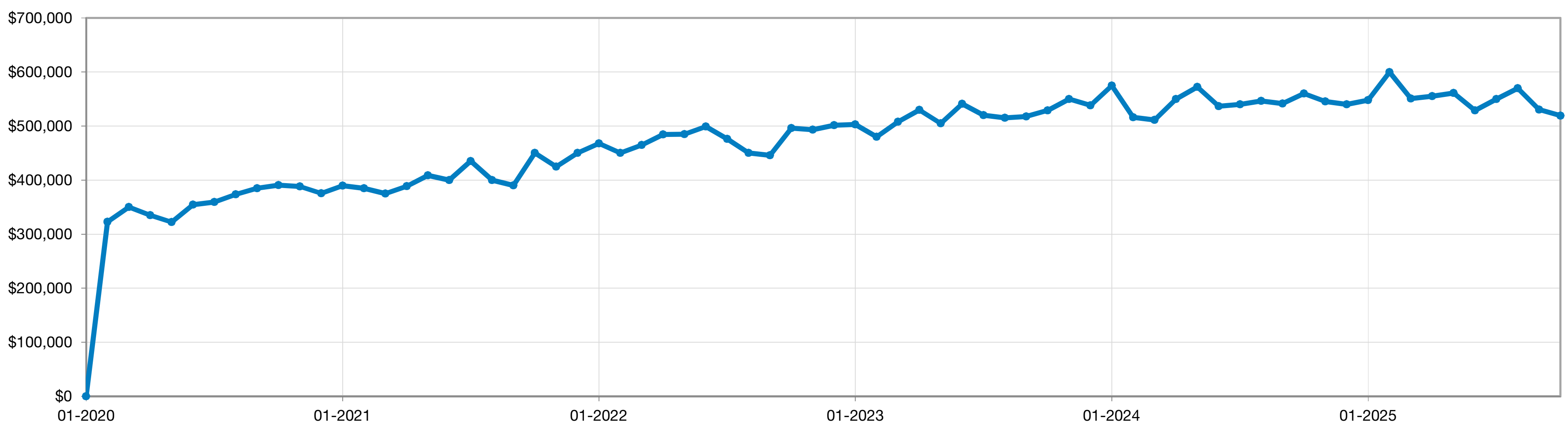
Year to Date



Median Sales Price		Prior Year	Percent Change
November 2024	$545,195	$550,000	-0.9%
December 2024	$540,000	$538,000	+0.4%
January 2025	$547,900	$574,907	-4.7%
February 2025	$599,725	$516,063	+16.2%
March 2025	$550,665	$511,250	+7.7%
April 2025	$555,000	$549,900	+0.9%
May 2025	$560,900	$572,500	-2.0%
June 2025	$529,000	$536,755	-1.4%
July 2025	$550,000	$540,000	+1.9%
August 2025	$570,000	$546,386	+4.3%
September 2025	$530,333	$541,500	-2.1%
October 2025	**$518,995**	**$560,000**	**-7.3%**
12-Month Med*	$547,940	$542,500	+1.0%

* Median Sales Price of all properties from November 2024 through October 2025. This is not the median of the individual figures above.

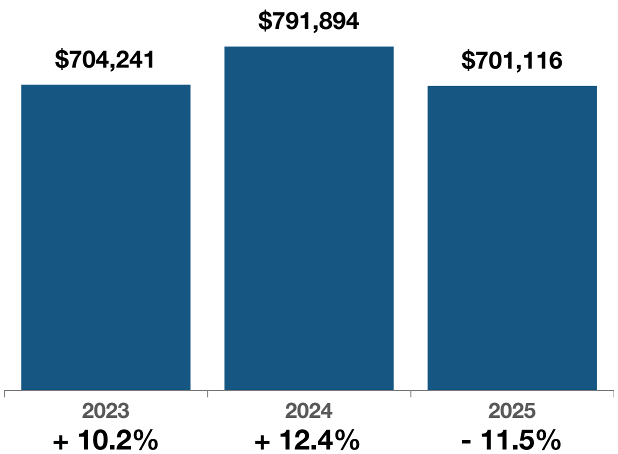
Historical Median Sales Price by Month



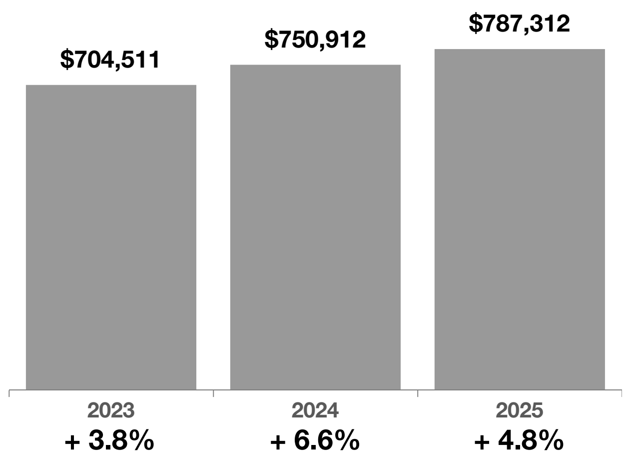
Average Sales Price

Average sales price for all closed sales, not accounting for seller concessions, in a given month.

October



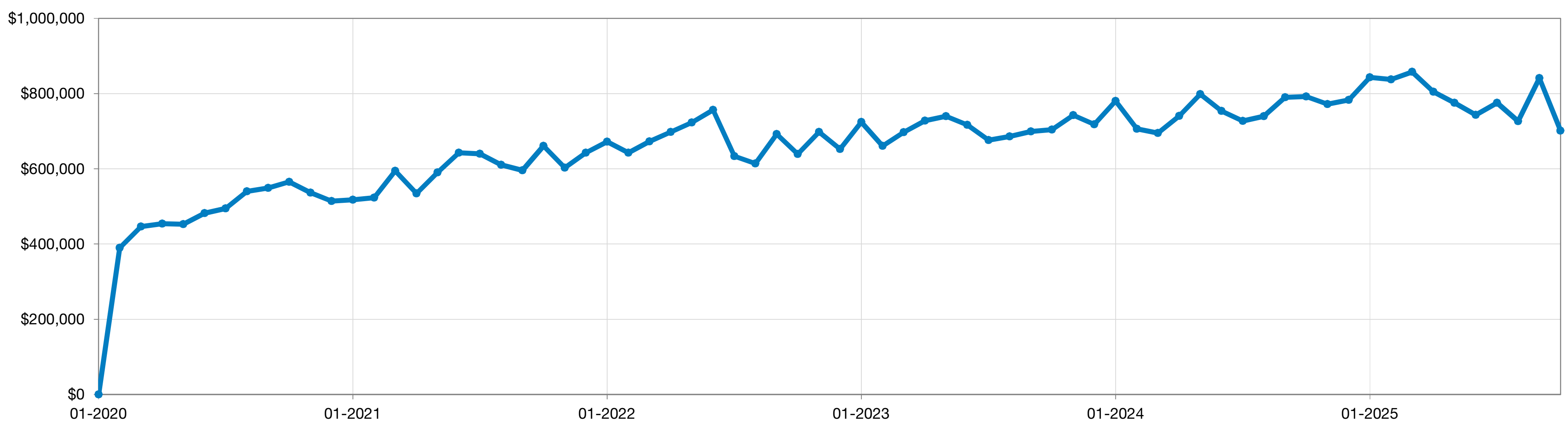
Year to Date



Avg. Sales Price		Prior Year	Percent Change
November 2024	$772,131	$742,744	+4.0%
December 2024	$783,354	$717,912	+9.1%
January 2025	$843,279	$780,490	+8.0%
February 2025	$837,616	$706,028	+18.6%
March 2025	$857,753	$695,288	+23.4%
April 2025	$805,061	$740,484	+8.7%
May 2025	$775,612	$798,323	-2.8%
June 2025	$743,553	$753,700	-1.3%
July 2025	$775,783	$726,965	+6.7%
August 2025	$726,522	$739,625	-1.8%
September 2025	$841,165	$790,472	+6.4%
October 2025	**$701,116**	**$791,894**	**-11.5%**
12-Month Avg*	$788,579	$748,660	+5.3%

* Avg. Sales Price of all properties from November 2024 through October 2025. This is not the average of the individual figures above.

Historical Average Sales Price by Month



Percent of List Price Received

Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

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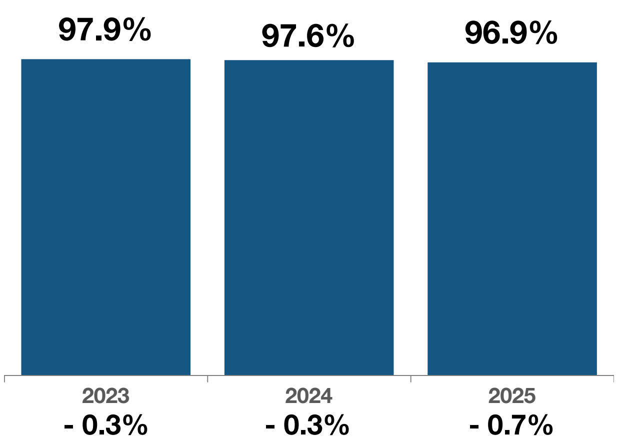
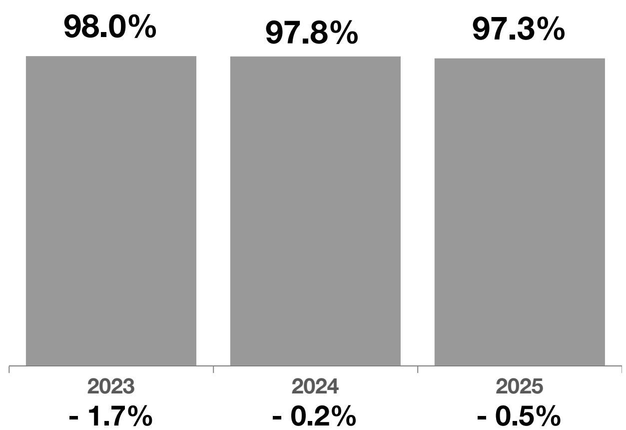
October



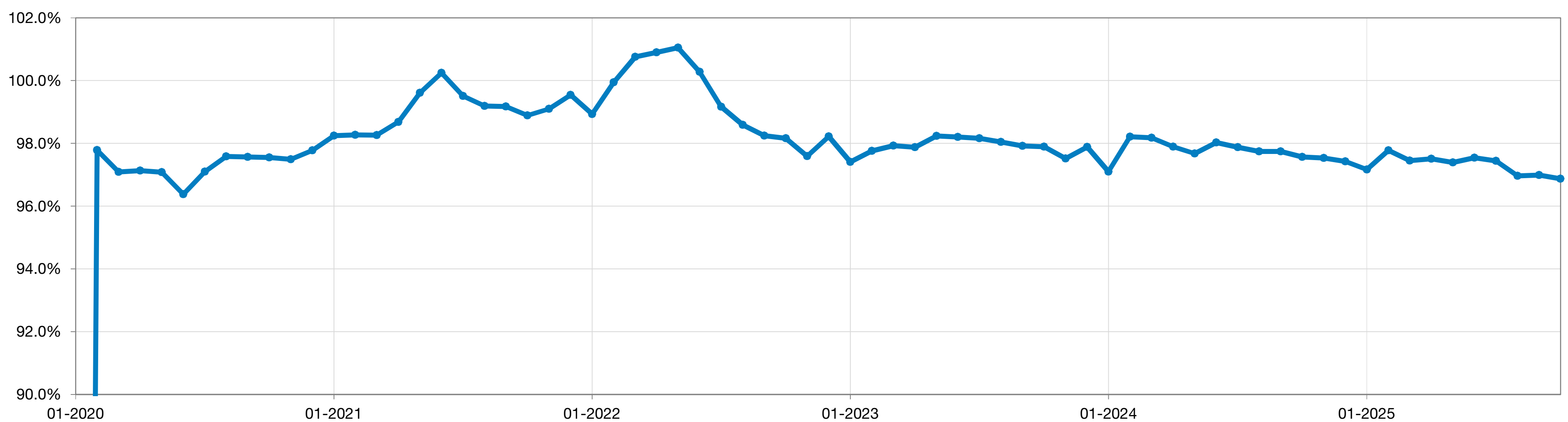
Year to Date



Pct. of List Price Received		Prior Year	Percent Change
November 2024	97.5%	97.5%	0.0%
December 2024	97.4%	97.9%	-0.5%
January 2025	97.2%	97.1%	+0.1%
February 2025	97.8%	98.2%	-0.4%
March 2025	97.5%	98.2%	-0.7%
April 2025	97.5%	97.9%	-0.4%
May 2025	97.4%	97.7%	-0.3%
June 2025	97.5%	98.0%	-0.5%
July 2025	97.4%	97.9%	-0.5%
August 2025	97.0%	97.7%	-0.7%
September 2025	97.0%	97.7%	-0.7%
October 2025	**96.9%**	**97.6%**	**-0.7%**
12-Month Avg*	97.3%	97.8%	-0.5%

* Average Pct. of List Price Received for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

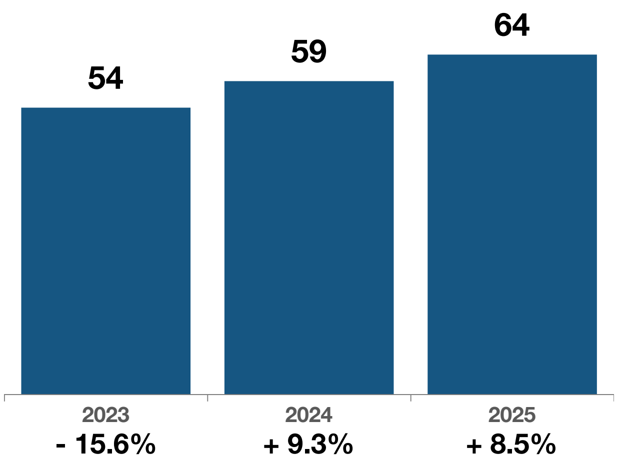
Historical Percent of List Price Received by Month



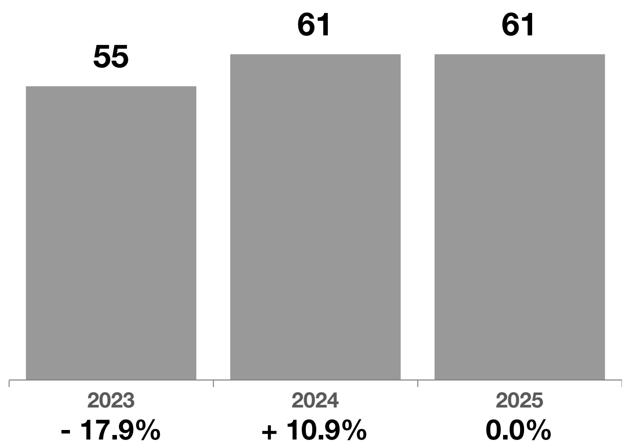
Housing Affordability Index

This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

October

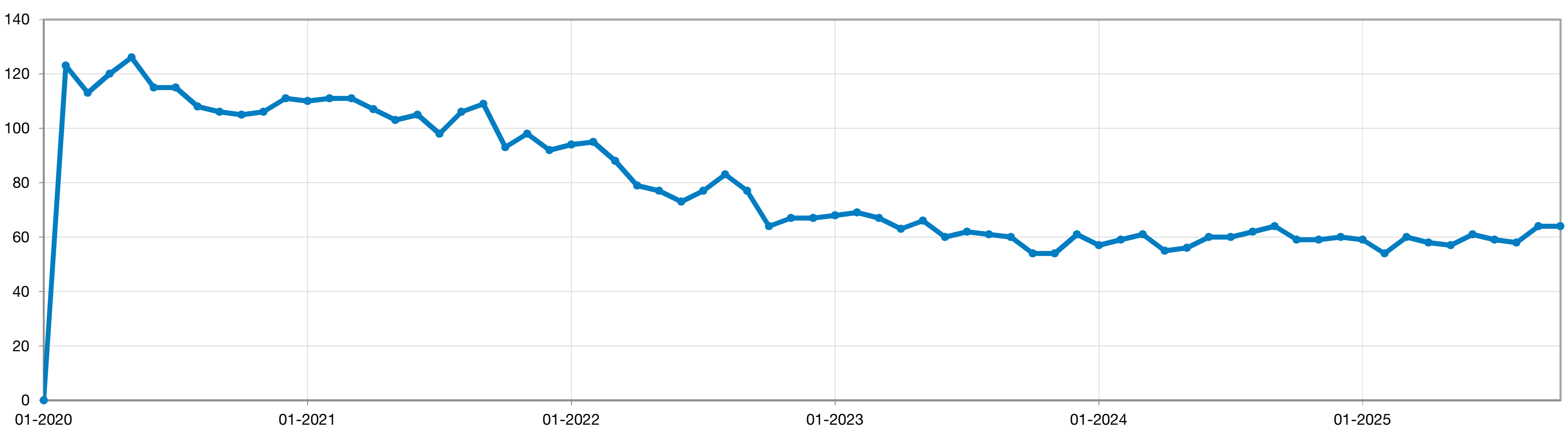


Year to Date



Affordability Index		Prior Year	Percent Change
November 2024	59	54	+9.3%
December 2024	60	61	-1.6%
January 2025	59	57	+3.5%
February 2025	54	59	-8.5%
March 2025	60	61	-1.6%
April 2025	58	55	+5.5%
May 2025	57	56	+1.8%
June 2025	61	60	+1.7%
July 2025	59	60	-1.7%
August 2025	58	62	-6.5%
September 2025	64	64	0.0%
October 2025	**64**	**59**	**+8.5%**
12-Month Avg	59	59	+0.7%

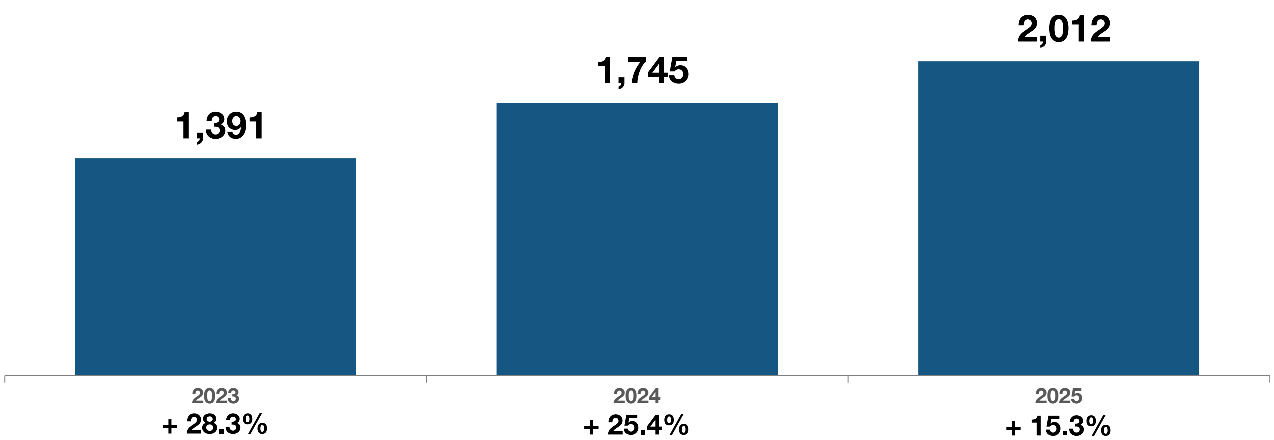
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given month.

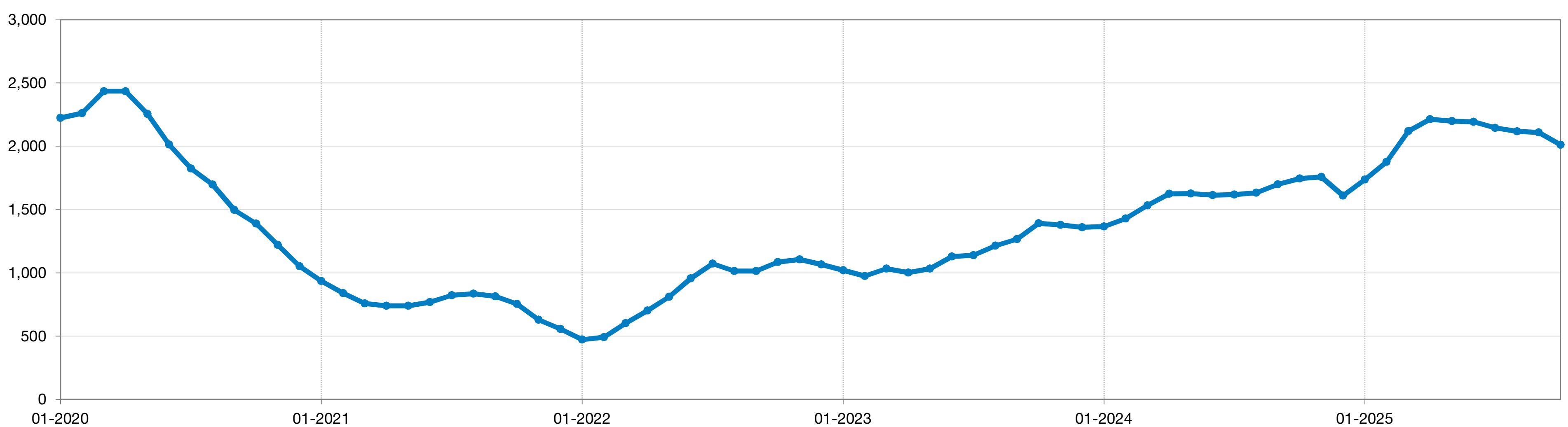
October



Homes for Sale		Prior Year	Percent Change
November 2024	1,757	1,379	+27.4%
December 2024	1,609	1,360	+18.3%
January 2025	1,736	1,366	+27.1%
February 2025	1,877	1,428	+31.4%
March 2025	2,119	1,532	+38.3%
April 2025	2,213	1,625	+36.2%
May 2025	2,199	1,626	+35.2%
June 2025	2,193	1,613	+36.0%
July 2025	2,145	1,618	+32.6%
August 2025	2,118	1,633	+29.7%
September 2025	2,110	1,700	+24.1%
October 2025	**2,012**	**1,745**	**+15.3%**
12-Month Avg*	2,007	1,552	+29.3%

* Homes for Sale for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

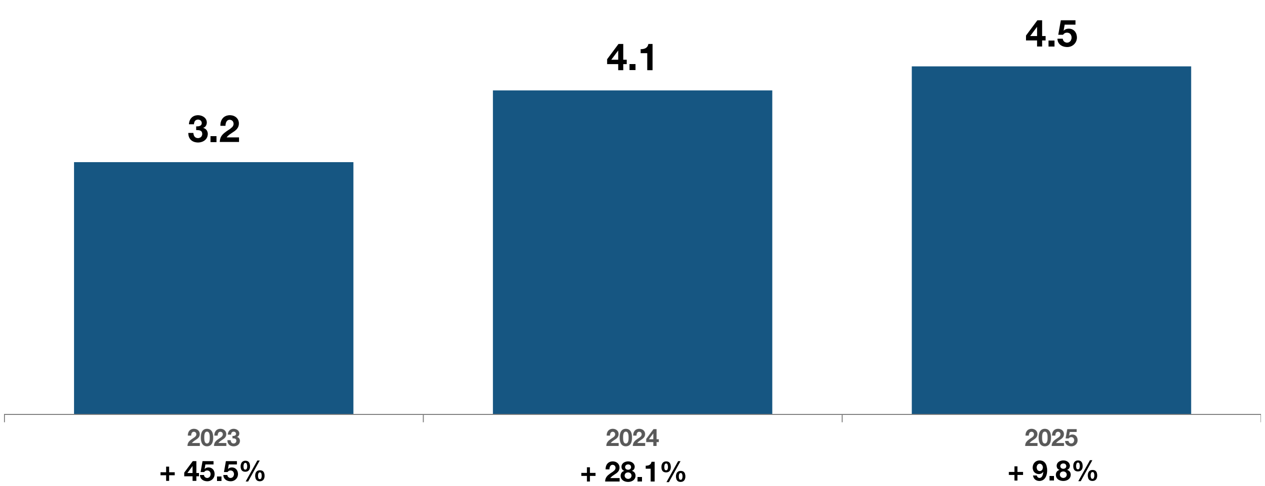
Historical Inventory of Homes for Sale by Month



Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

October



Months Supply		Prior Year	Percent Change
November 2024	4.2	3.2	+31.3%
December 2024	3.8	3.2	+18.8%
January 2025	4.1	3.2	+28.1%
February 2025	4.5	3.3	+36.4%
March 2025	5.0	3.6	+38.9%
April 2025	5.3	3.8	+39.5%
May 2025	5.2	3.8	+36.8%
June 2025	5.1	3.8	+34.2%
July 2025	5.0	3.8	+31.6%
August 2025	4.9	3.9	+25.6%
September 2025	4.7	4.1	+14.6%
October 2025	**4.5**	**4.1**	**+9.8%**
12-Month Avg*	4.7	3.7	+27.0%

* Months Supply for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month