

# 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

|                                    |                                          |                                     |
|------------------------------------|------------------------------------------|-------------------------------------|
| <b>+ 12.6%</b>                     | <b>- 7.3%</b>                            | <b>+ 9.8%</b>                       |
| One-Year Change in<br>Closed Sales | One-Year Change in<br>Median Sales Price | One-Year Change in<br>Months Supply |

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

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# Market Overview

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



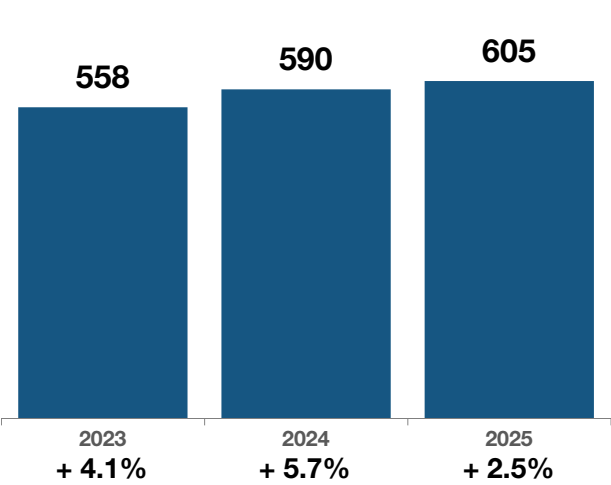
| Key Metrics                 | Historical Sparkbars | 10-2024   | 10-2025   | Percent Change | YTD 2024  | YTD 2025  | Percent Change |
|-----------------------------|----------------------|-----------|-----------|----------------|-----------|-----------|----------------|
| New Listings                |                      | 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

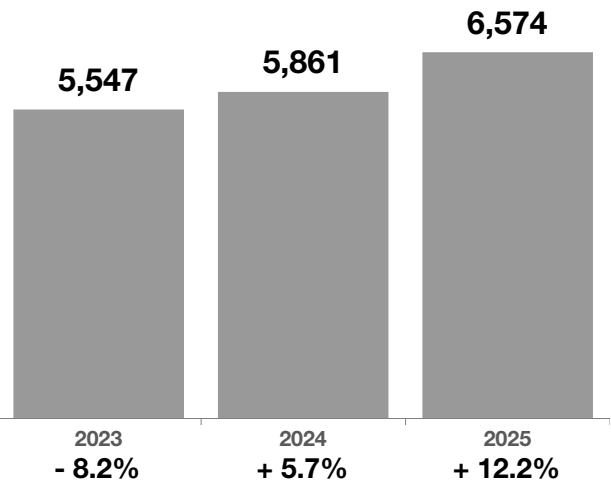
A count of the properties that have been newly listed on the market in a given month.



## 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

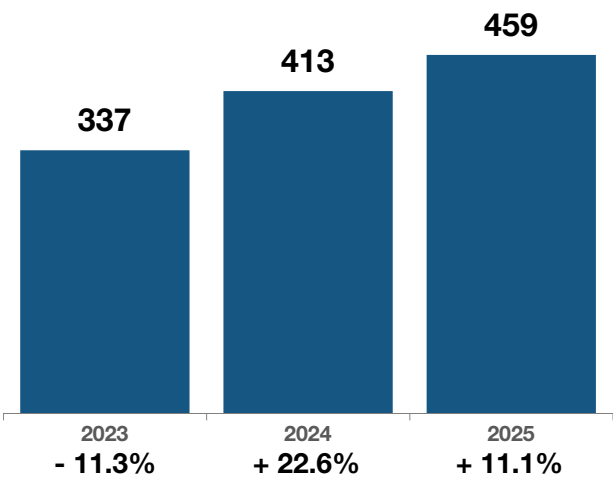


# Pending Sales

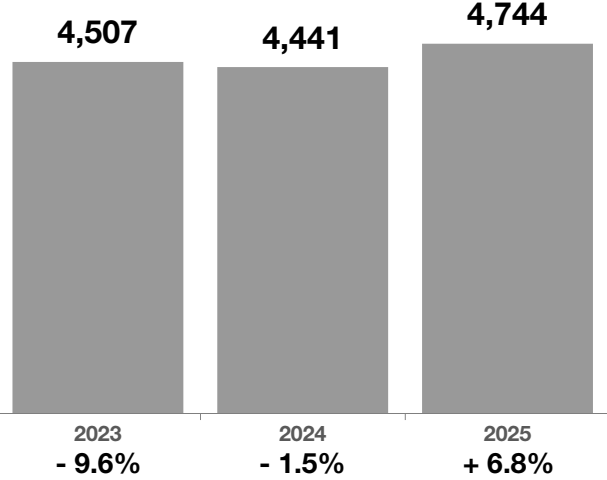
A count of the properties on which offers have been accepted in a given month.



## October

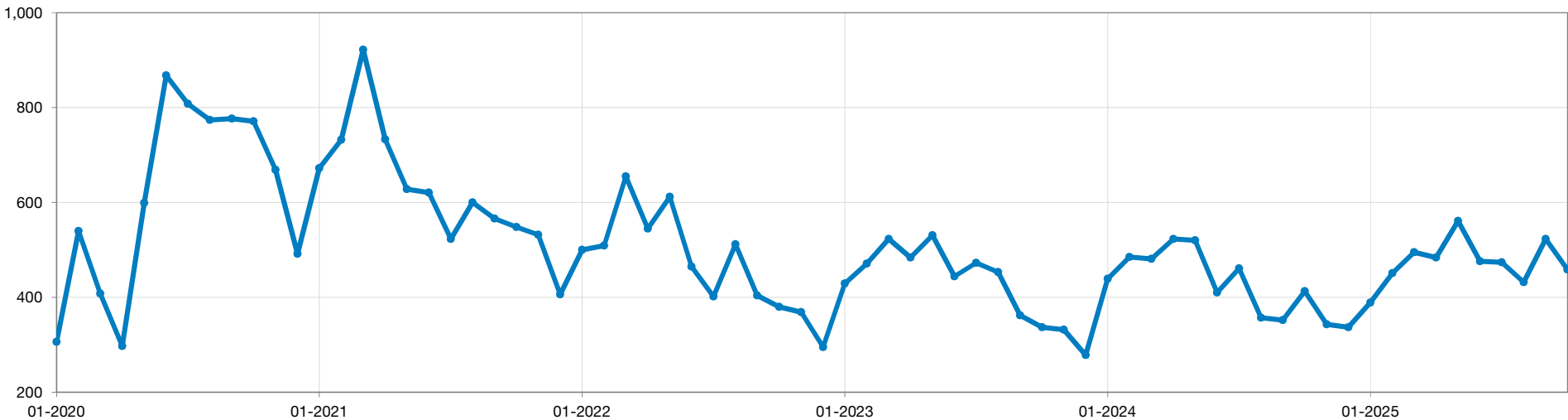


## Year to Date



| 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

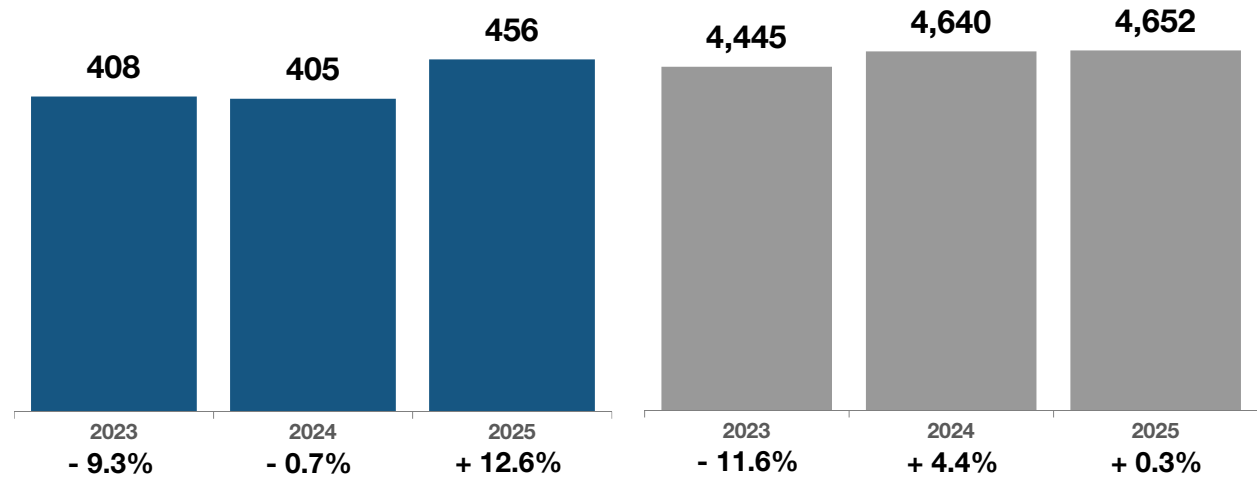


# Closed Sales

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

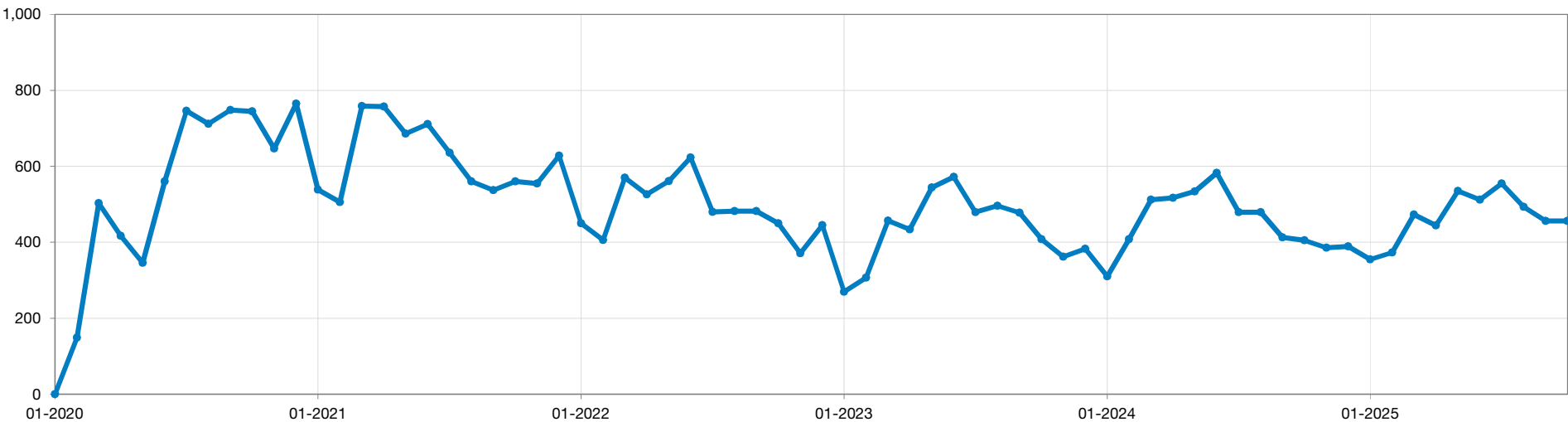


## October



| 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

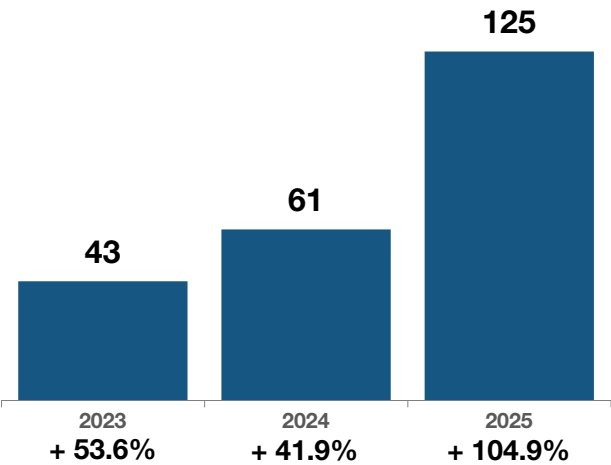


# Days on Market Until Sale

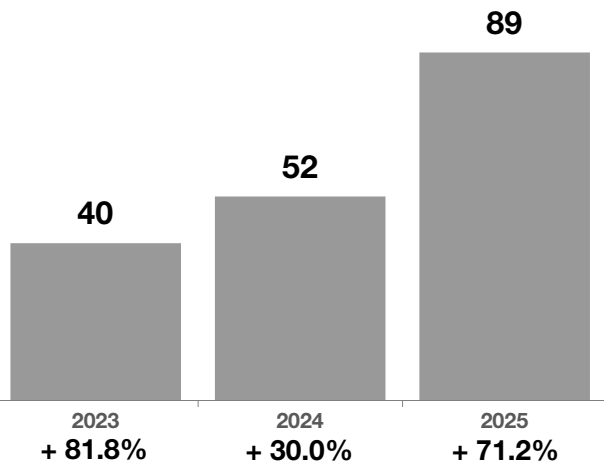
Average number of days between when a property is listed and when an offer is accepted in a given month.



## October



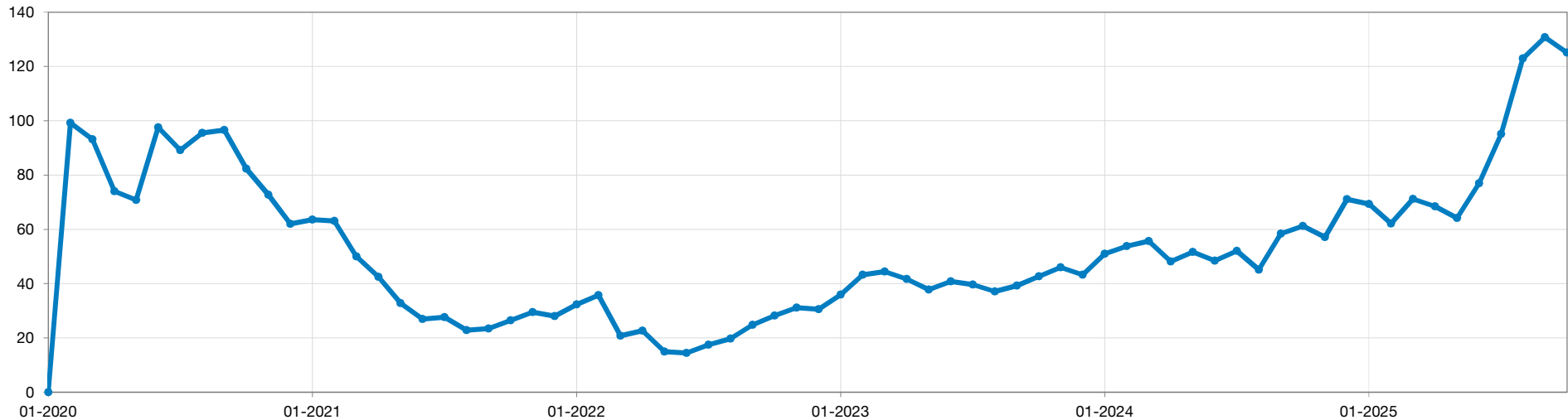
## Year to Date



| 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

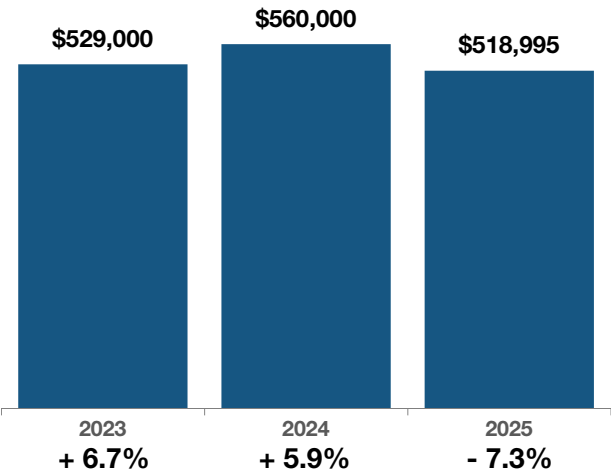


# Median Sales Price

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



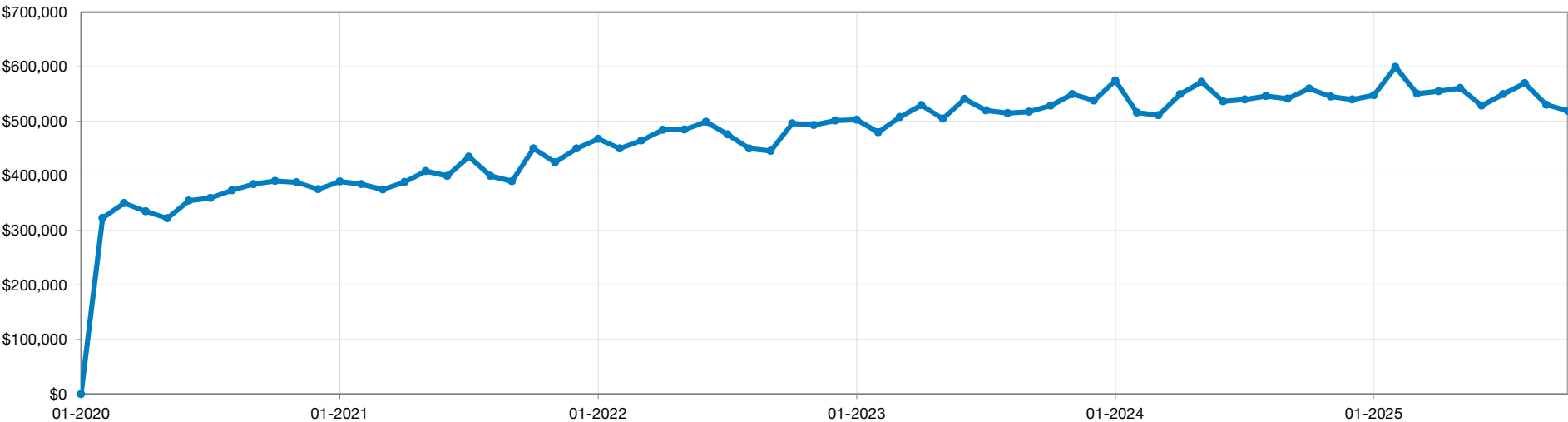
## Year to Date



|                | 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

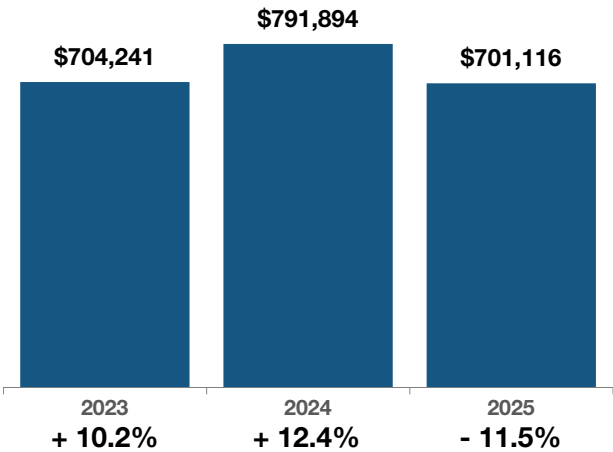


# Average Sales Price

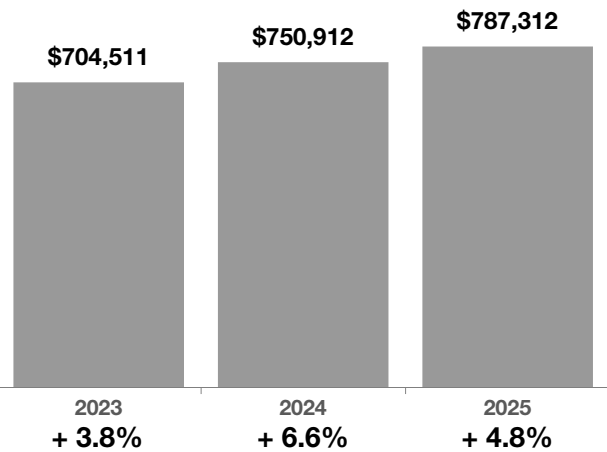
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## October



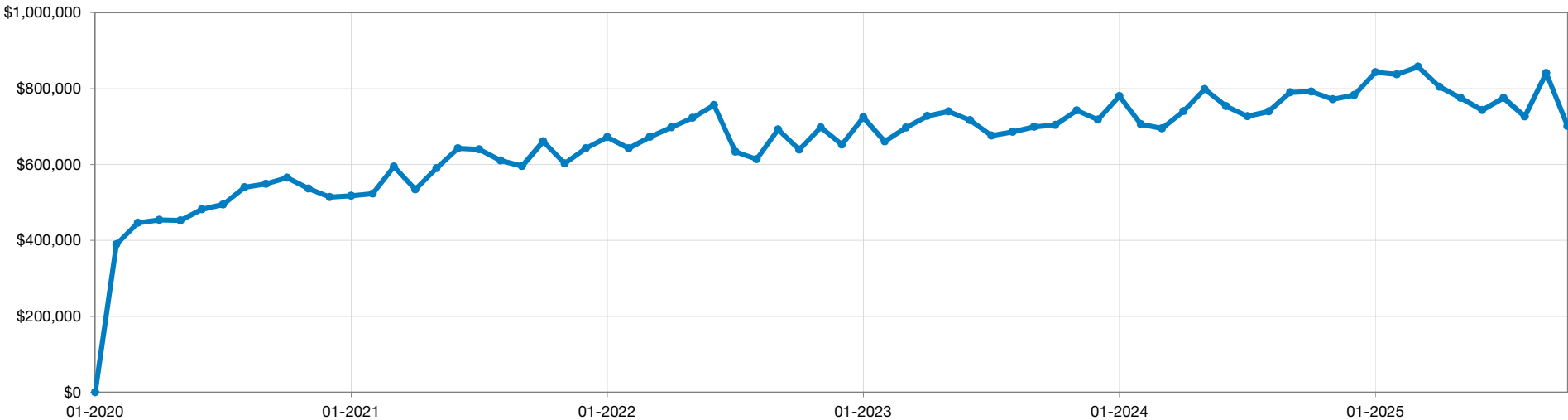
## Year to Date



| 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

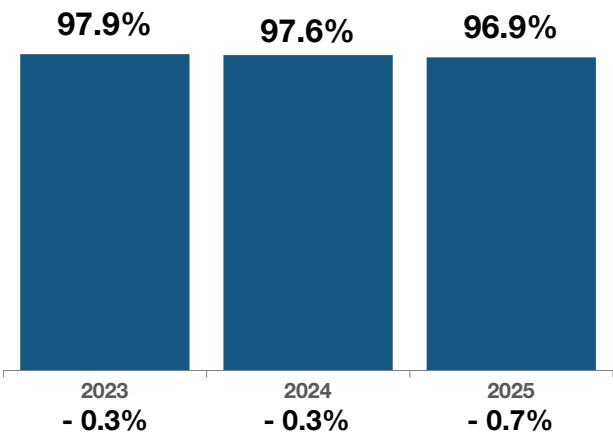


# Percent of List Price Received

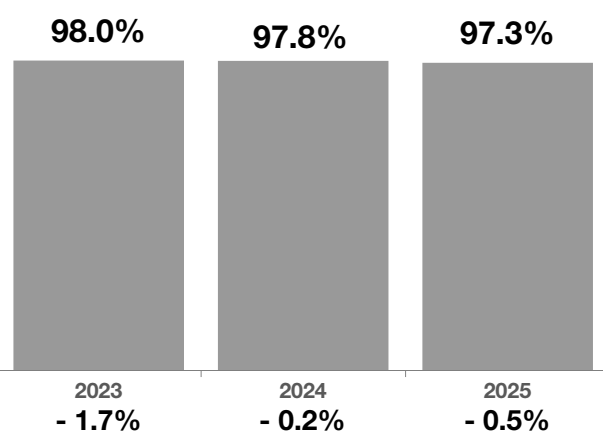
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



## October



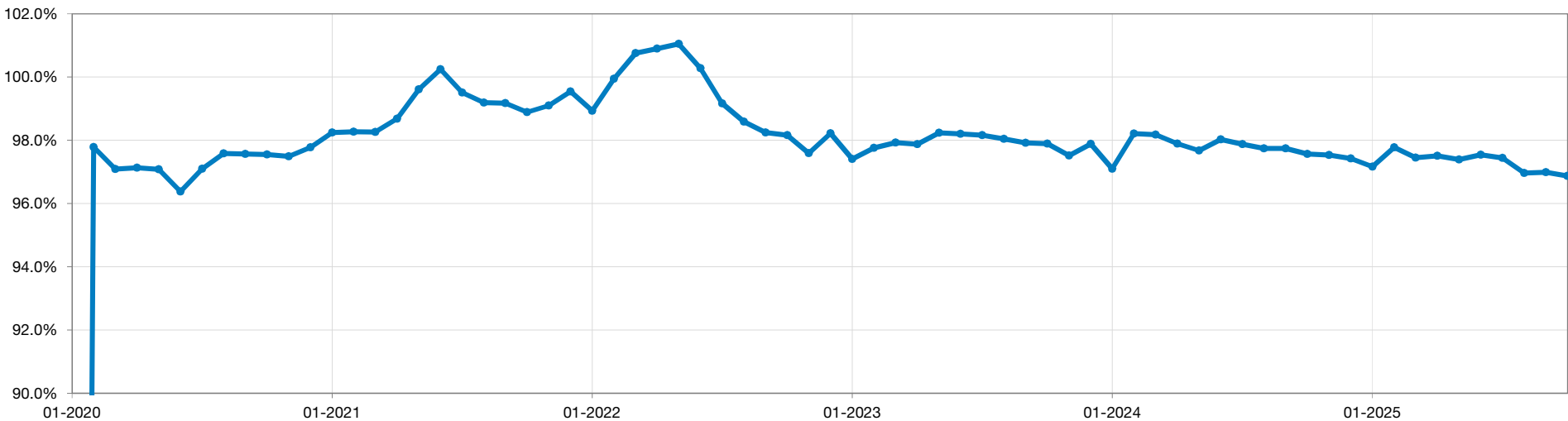
## Year to Date



| 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*               |       | 97.8%      | -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

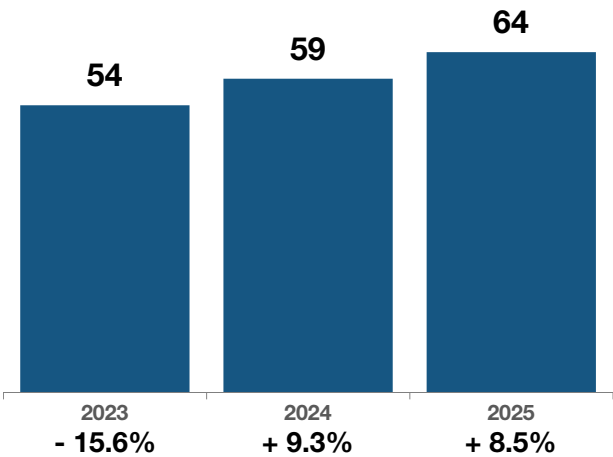


# Housing Affordability Index

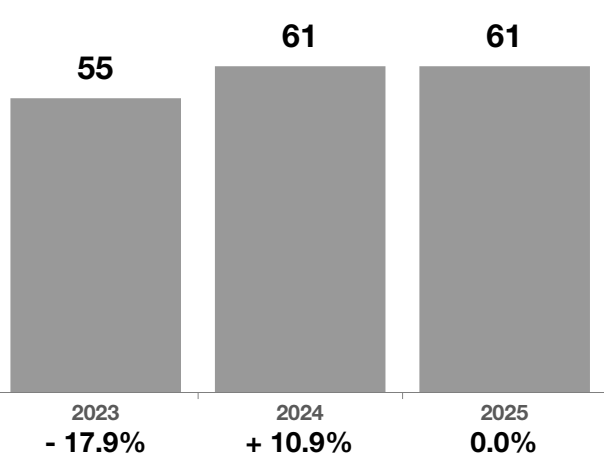
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



## October

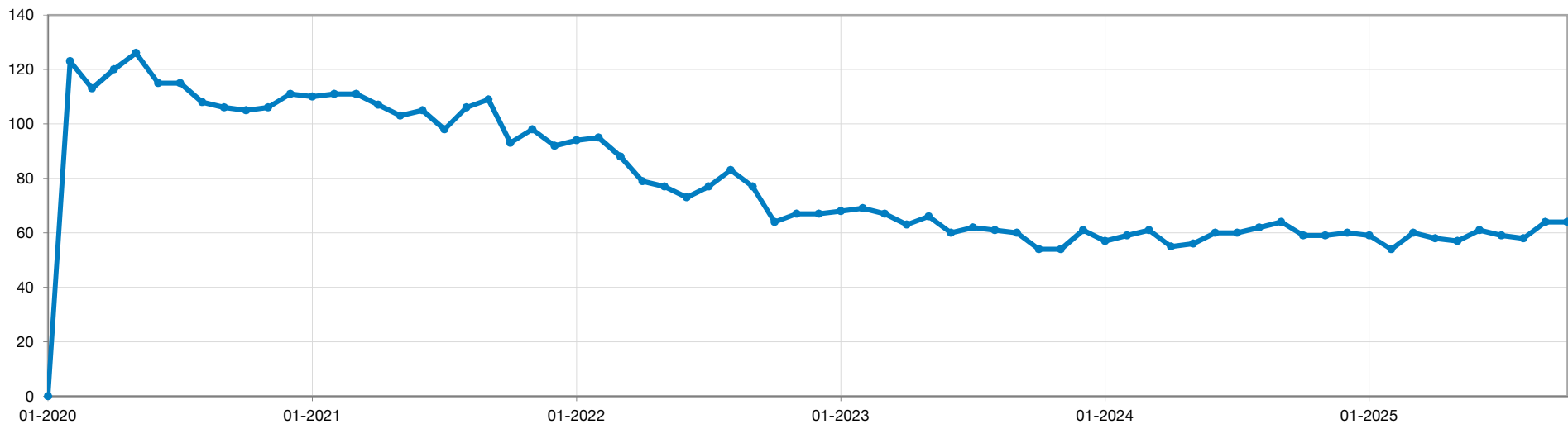


## Year to Date



| 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         | +0.7%          |

## Historical Housing Affordability Index by Month

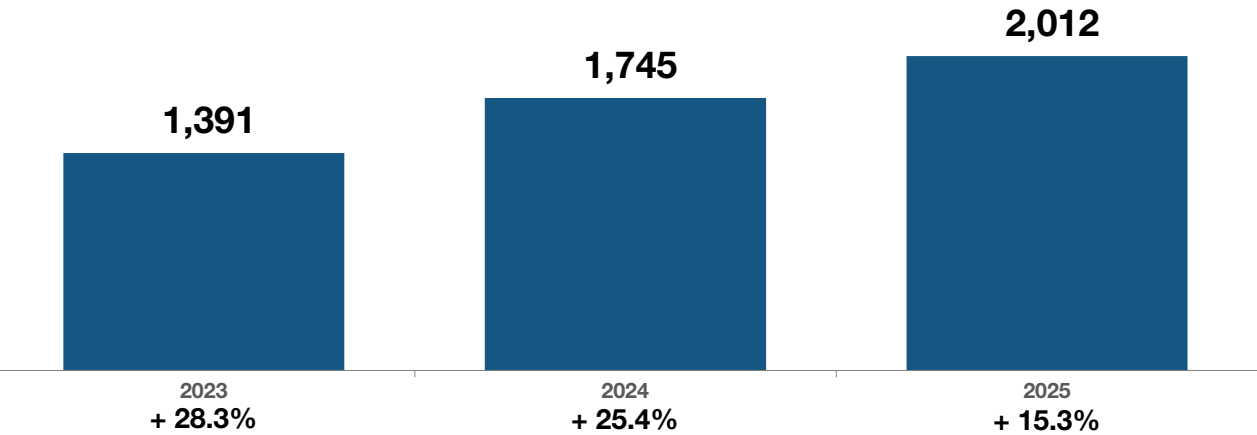


# Inventory of Homes for Sale

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



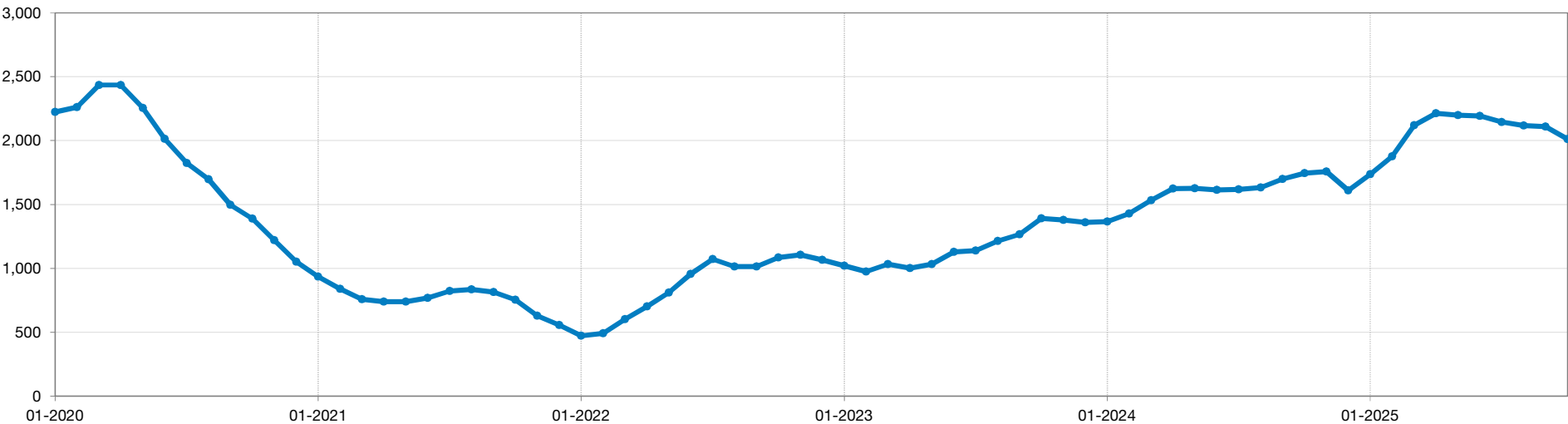
## October



| 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

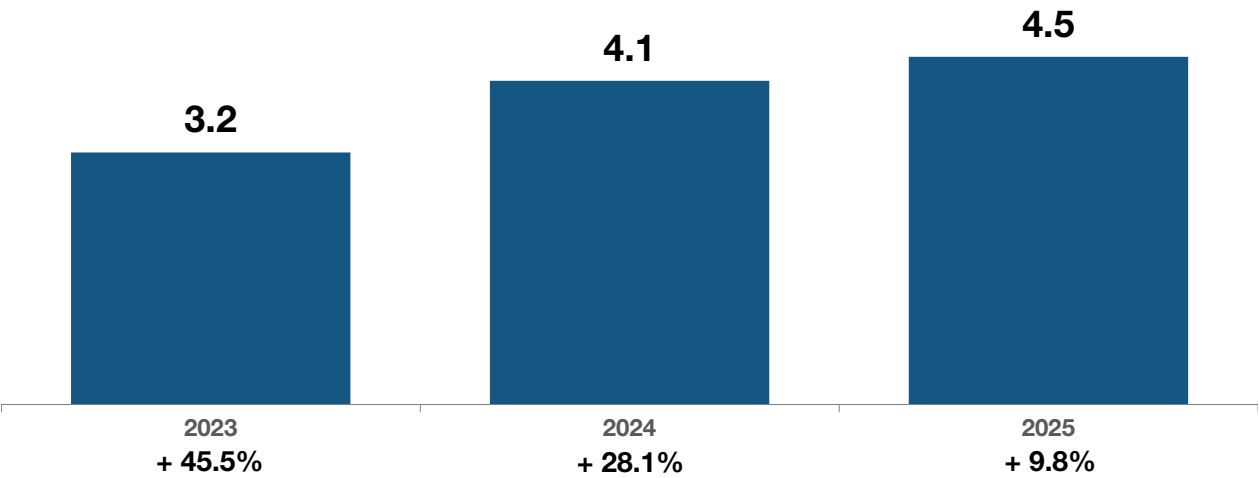


# Months Supply of Inventory

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

