

Monthly Indicators



December 2025

U.S. existing home sales ticked up 0.5% from the previous month to a seasonally adjusted annual rate of 4.13 million, marking the third consecutive monthly increase, according to the National Association of REALTORS® (NAR). However, sales were down 1.0% from the same period last year. Regionally, sales rose month-over-month in the Northeast and South, were unchanged in the West, and declined in the Midwest. On a year-over-year basis, sales were flat in the Northeast and South and fell in both the Midwest and West.

New Listings were up 3.4 percent to 368. Pending Sales decreased 11.0 percent to 300. Inventory grew 11.3 percent to 1,793 units.

Median Sales Price was down 5.6 percent to \$510,000. Days on Market increased 84.5 percent to 131 days. Months Supply of Inventory was up 5.3 percent to 4.0 months.

The national median existing-home price continued to climb, rising 1.2% from a year ago to \$409,200, according to NAR. This year-over-year increase—the 29th consecutive monthly gain—reflects ongoing tightness in housing supply. At the end of November, there were 1.43 million units for sale, down 5.9% from the previous month but up 7.5% from the same time last year, representing a 4.2-month supply at the current sales pace.

Quick Facts

+ 8.2%

- 5.6%

+ 5.3%

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.

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Market Overview

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



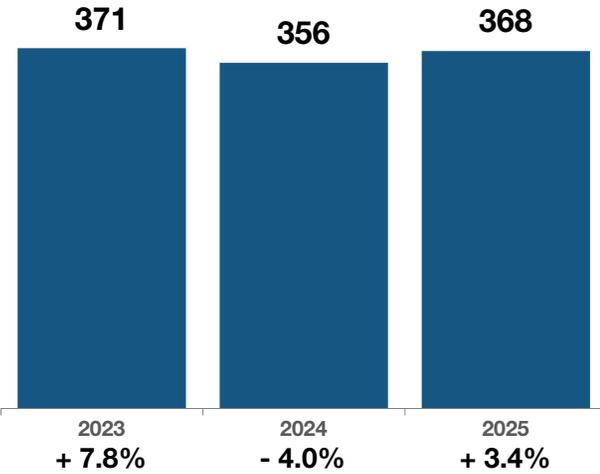
Key Metrics	Historical Sparkbars	12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		356	368	+ 3.4%	6,680	7,384	+ 10.5%
Pending Sales		337	300	- 11.0%	5,121	5,377	+ 5.0%
Closed Sales		389	421	+ 8.2%	5,415	5,475	+ 1.1%
Days on Market		71	131	+ 84.5%	54	96	+ 77.8%
Median Sales Price		\$540,000	\$510,000	- 5.6%	\$542,000	\$545,000	+ 0.6%
Average Sales Price		\$783,354	\$799,080	+ 2.0%	\$754,750	\$786,670	+ 4.2%
Pct. of List Price Received		97.4%	96.8%	- 0.6%	97.8%	97.2%	- 0.6%
Housing Affordability Index		60	65	+ 8.3%	60	61	+ 1.7%
Inventory of Homes for Sale		1,611	1,793	+ 11.3%	--	--	--
Months Supply of Inventory		3.8	4.0	+ 5.3%	--	--	--

New Listings

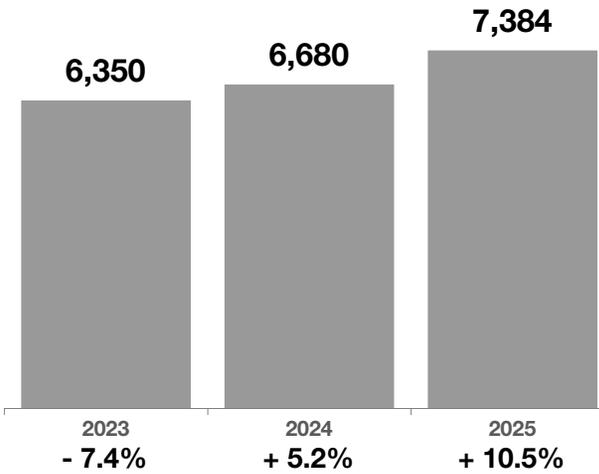
A count of the properties that have been newly listed on the market in a given month.



December

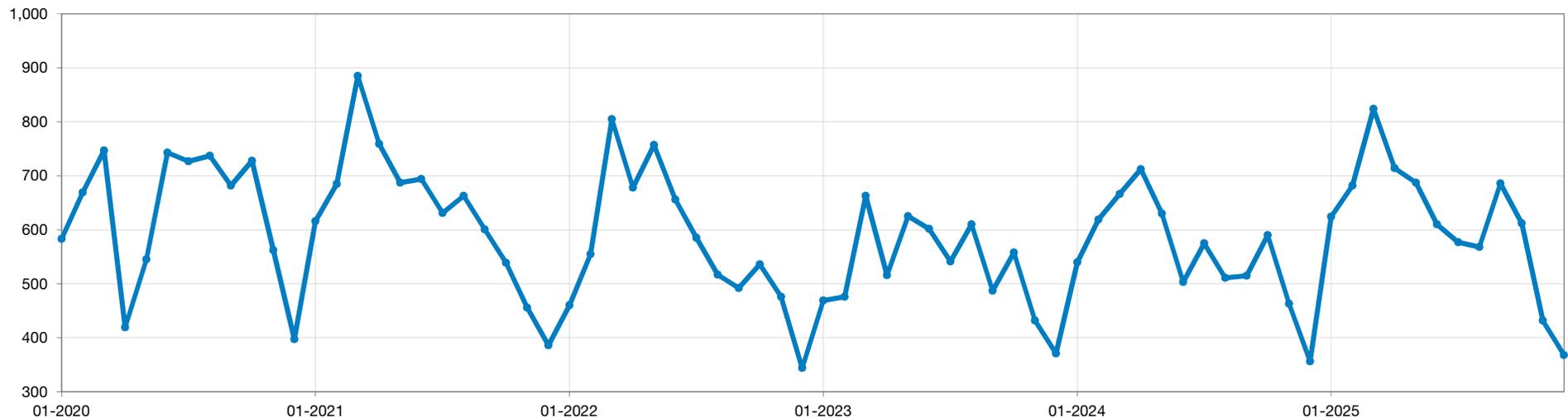


Year to Date



	New Listings	Prior Year	Percent Change
January 2025	624	540	+15.6%
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	686	515	+33.2%
October 2025	612	590	+3.7%
November 2025	432	463	-6.7%
December 2025	368	356	+3.4%
12-Month Avg	615	557	+10.5%

Historical New Listings by Month

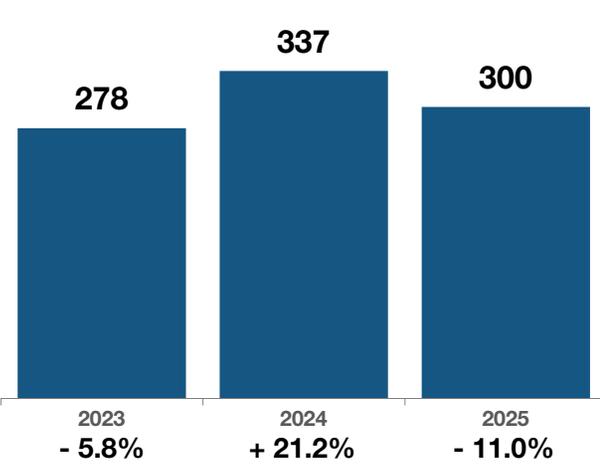


Pending Sales

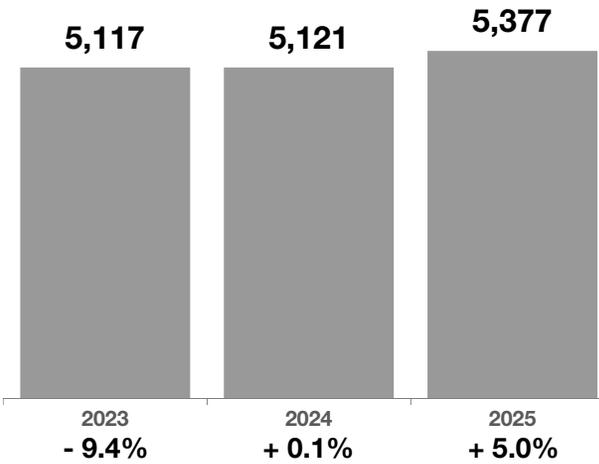
A count of the properties on which offers have been accepted in a given month.



December

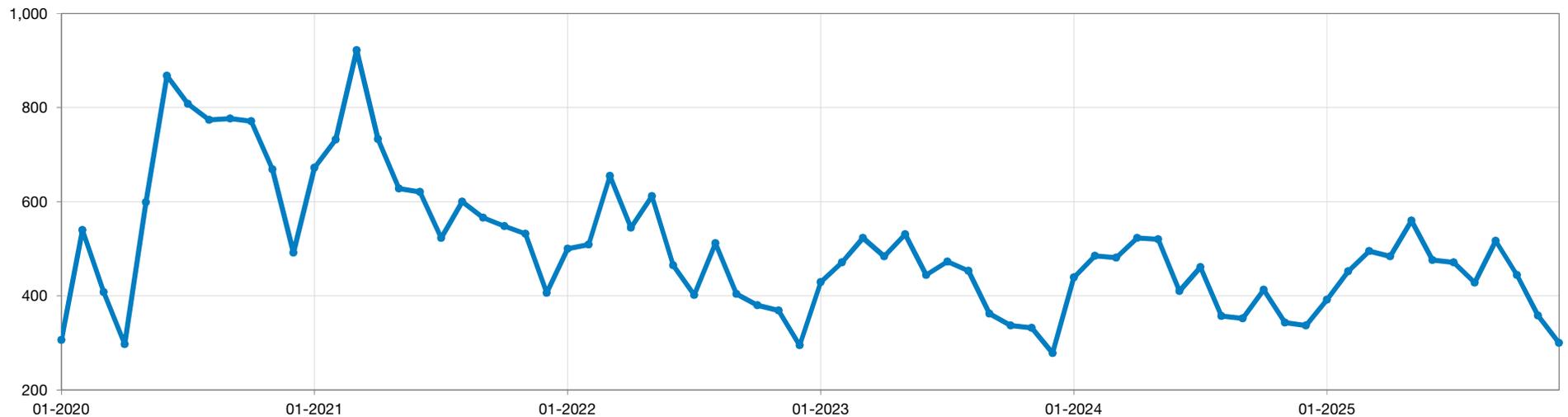


Year to Date



Pending Sales	Prior Year	Percent Change	
January 2025	392	439	-10.7%
February 2025	452	485	-6.8%
March 2025	495	481	+2.9%
April 2025	484	523	-7.5%
May 2025	560	520	+7.7%
June 2025	476	410	+16.1%
July 2025	471	461	+2.2%
August 2025	428	357	+19.9%
September 2025	517	352	+46.9%
October 2025	444	413	+7.5%
November 2025	358	343	+4.4%
December 2025	300	337	-11.0%
12-Month Avg	448	427	+5.0%

Historical Pending Sales by Month

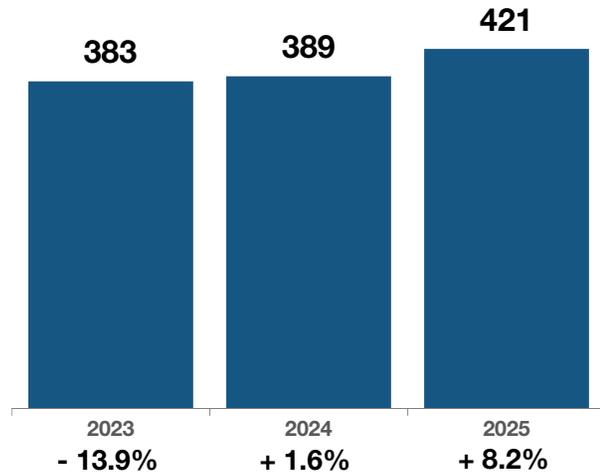


Closed Sales

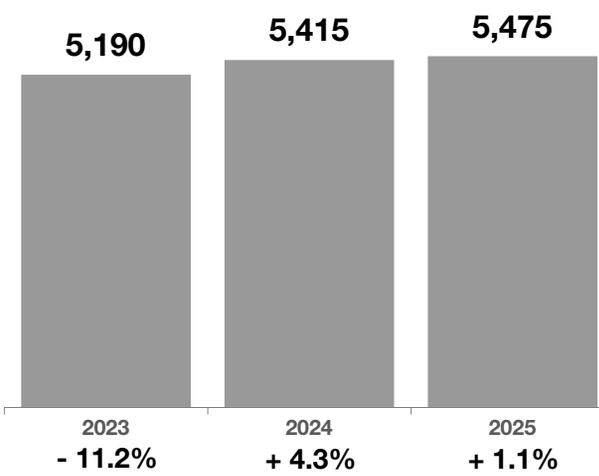
A count of the actual sales that closed in a given month.



December

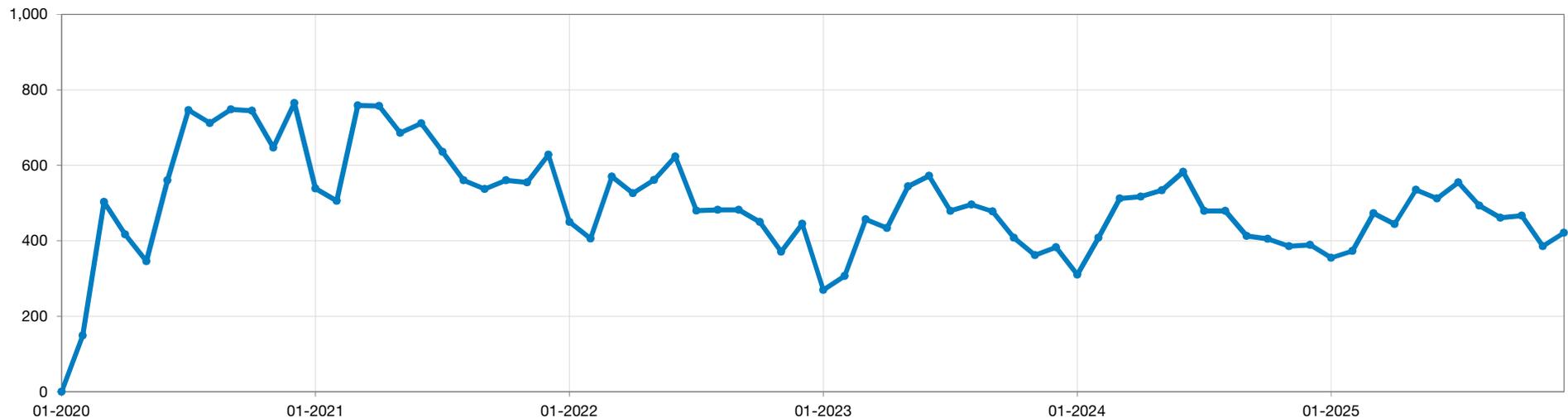


Year to Date



Closed Sales	Prior Year	Percent Change
January 2025	310	+14.5%
February 2025	408	-8.6%
March 2025	512	-7.6%
April 2025	517	-14.1%
May 2025	534	+0.2%
June 2025	583	-12.2%
July 2025	479	+15.9%
August 2025	479	+2.9%
September 2025	413	+11.6%
October 2025	405	+15.3%
November 2025	386	0.0%
December 2025	389	+8.2%
12-Month Avg	456	+1.1%

Historical Closed Sales by Month

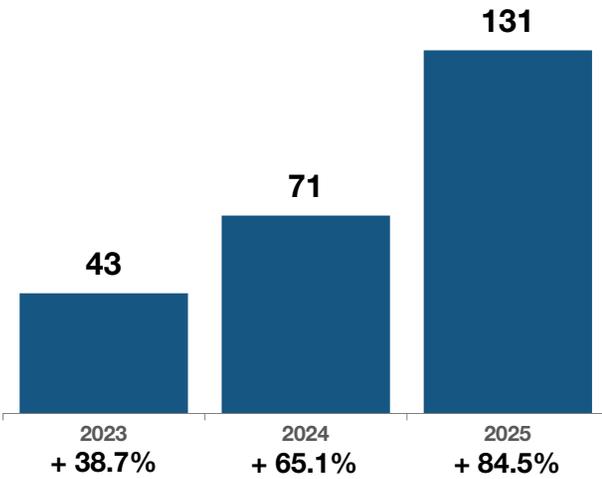


Days on Market Until Sale

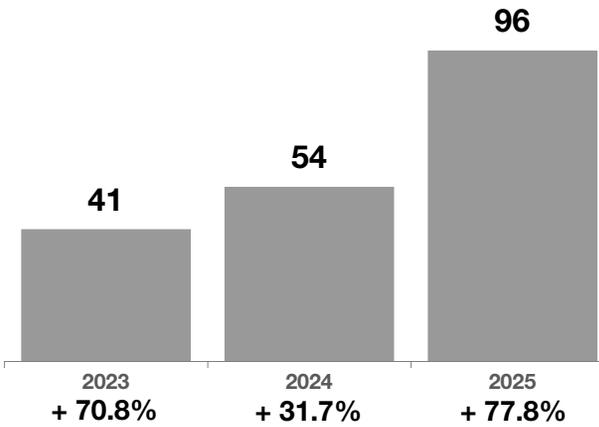
Average number of days between when a property is listed and when an offer is accepted in a given month.



December



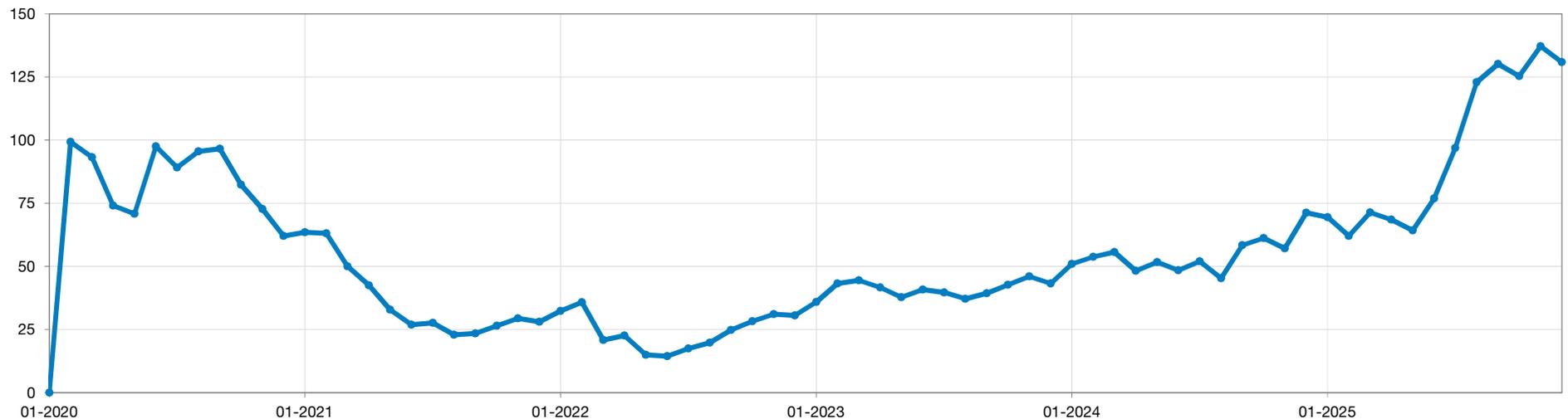
Year to Date



Days on Market	Prior Year	Percent Change	
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	97	52	+86.5%
August 2025	123	45	+173.3%
September 2025	130	58	+124.1%
October 2025	125	61	+104.9%
November 2025	137	57	+140.4%
December 2025	131	71	+84.5%
12-Month Avg*	96	54	+77.8%

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

Historical Days on Market Until Sale by Month

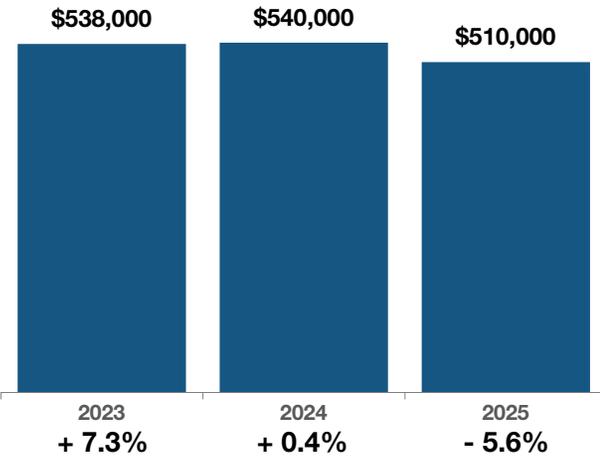


Median Sales Price

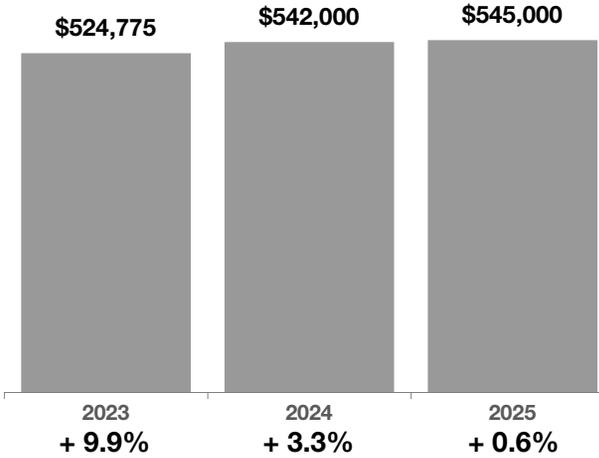
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



December



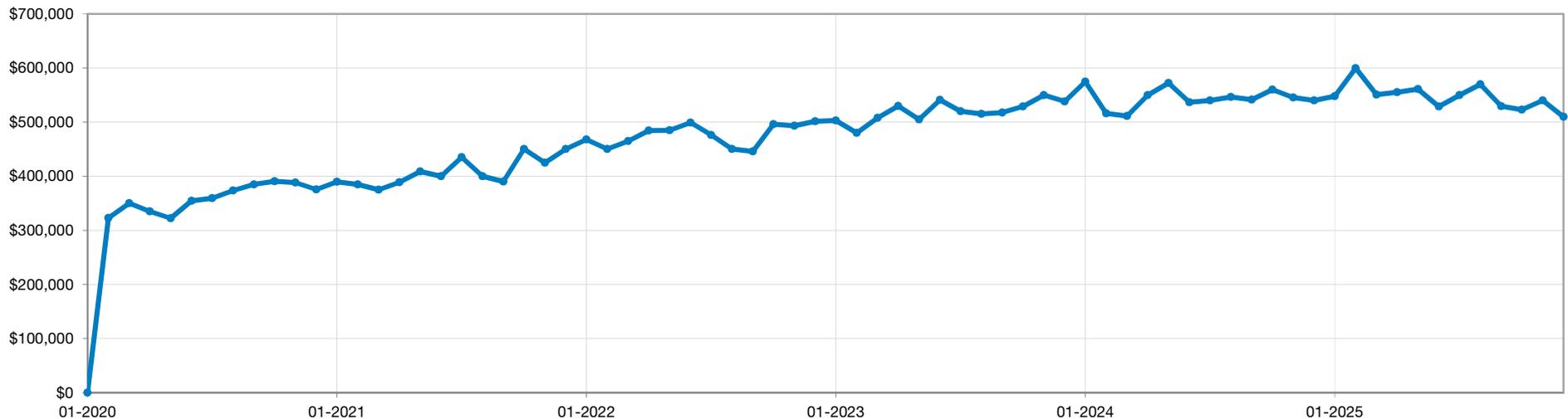
Year to Date



	Median Sales Price	Prior Year	Percent Change
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	\$529,165	\$541,500	-2.3%
October 2025	\$523,000	\$560,000	-6.6%
November 2025	\$540,000	\$545,195	-1.0%
December 2025	\$510,000	\$540,000	-5.6%
12-Month Med*	\$545,000	\$542,000	+0.6%

* Median Sales Price of all properties from January 2025 through December 2025. This is not the median of the individual figures above.

Historical Median Sales Price by Month

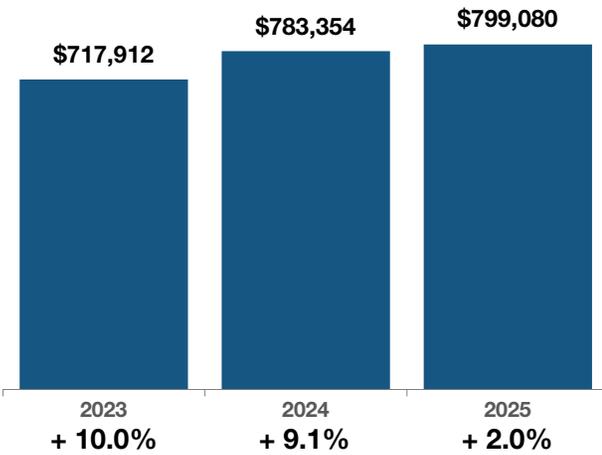


Average Sales Price

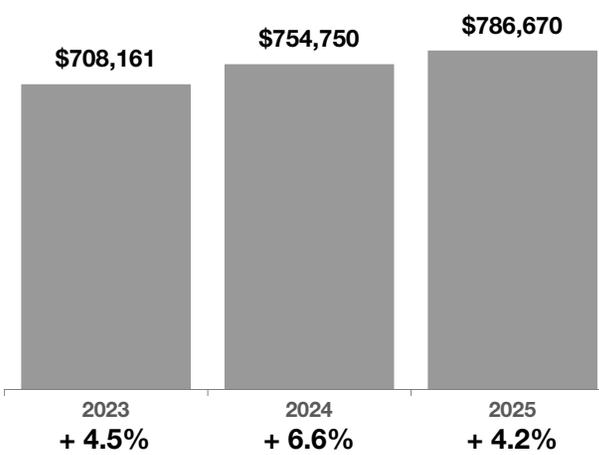
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



December



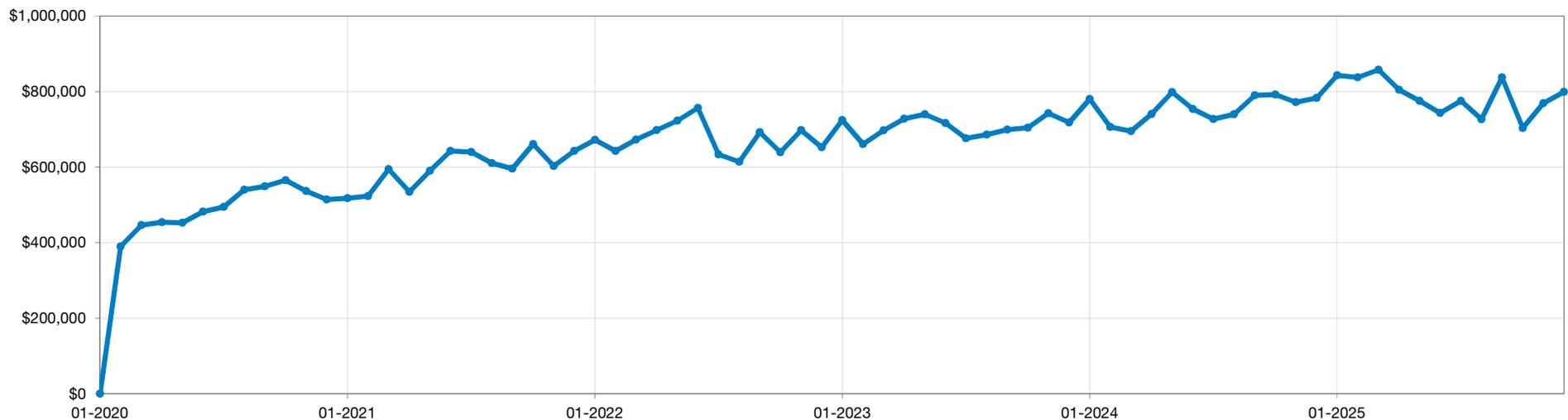
Year to Date



	Avg. Sales Price	Prior Year	Percent Change
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	\$837,334	\$790,472	+5.9%
October 2025	\$703,450	\$791,894	-11.2%
November 2025	\$768,880	\$772,131	-0.4%
December 2025	\$799,080	\$783,354	+2.0%
12-Month Avg*	\$789,494	\$756,563	+4.4%

* Avg. Sales Price of all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Historical Average Sales Price by Month

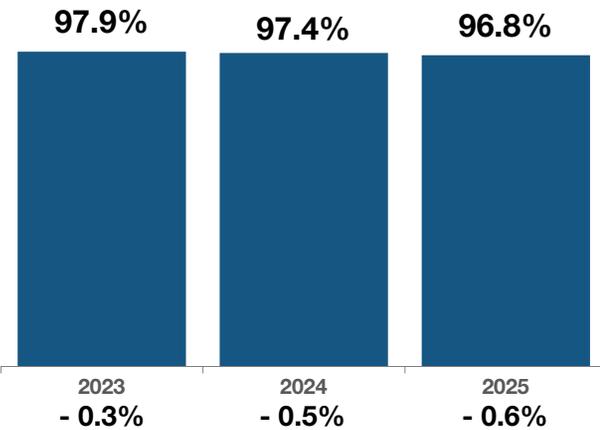


Percent of List Price Received

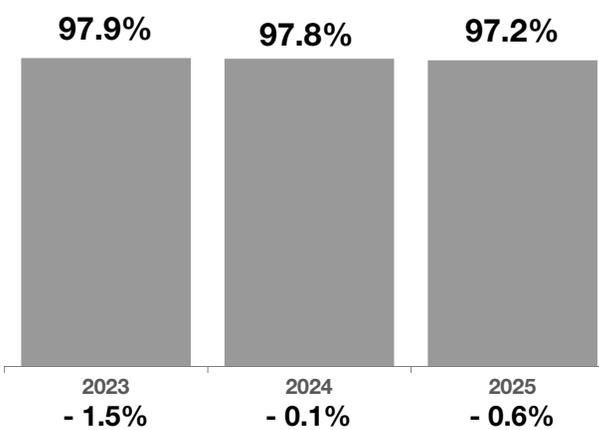
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



December



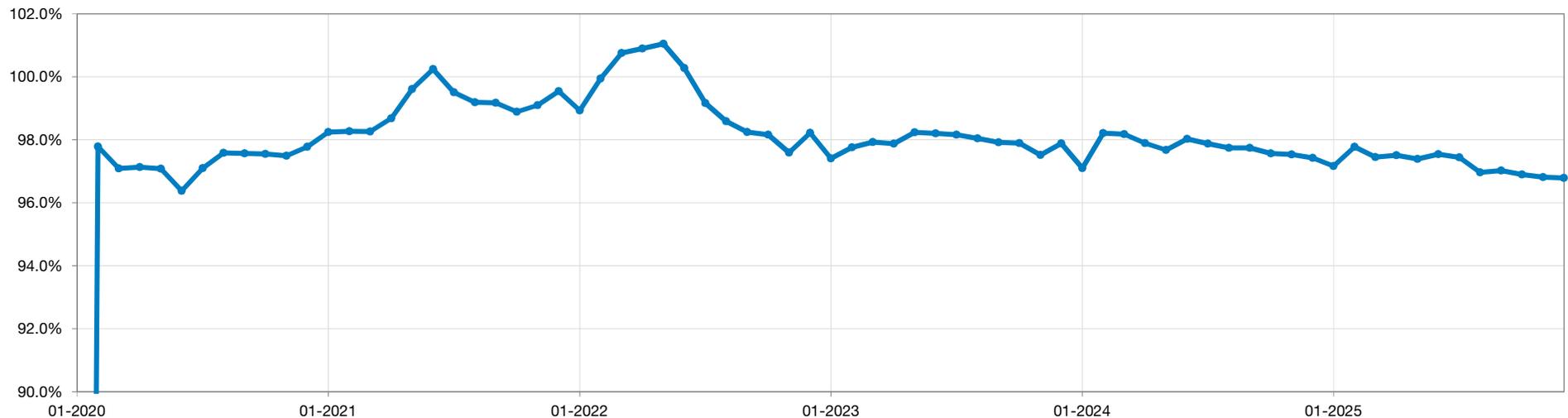
Year to Date



	Pct. of List Price Received	Prior Year	Percent Change
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%
November 2025	96.8%	97.5%	-0.7%
December 2025	96.8%	97.4%	-0.6%
12-Month Avg*	97.2%	97.8%	-0.6%

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

Historical Percent of List Price Received by Month

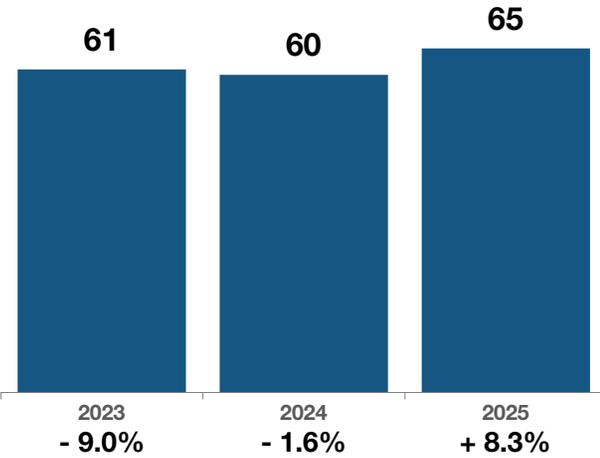


Housing Affordability Index

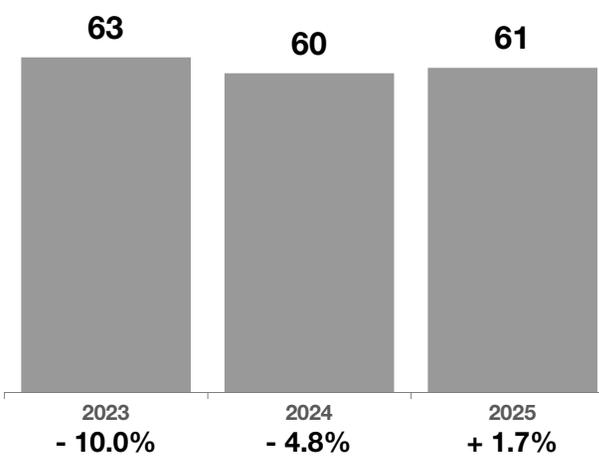
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



December

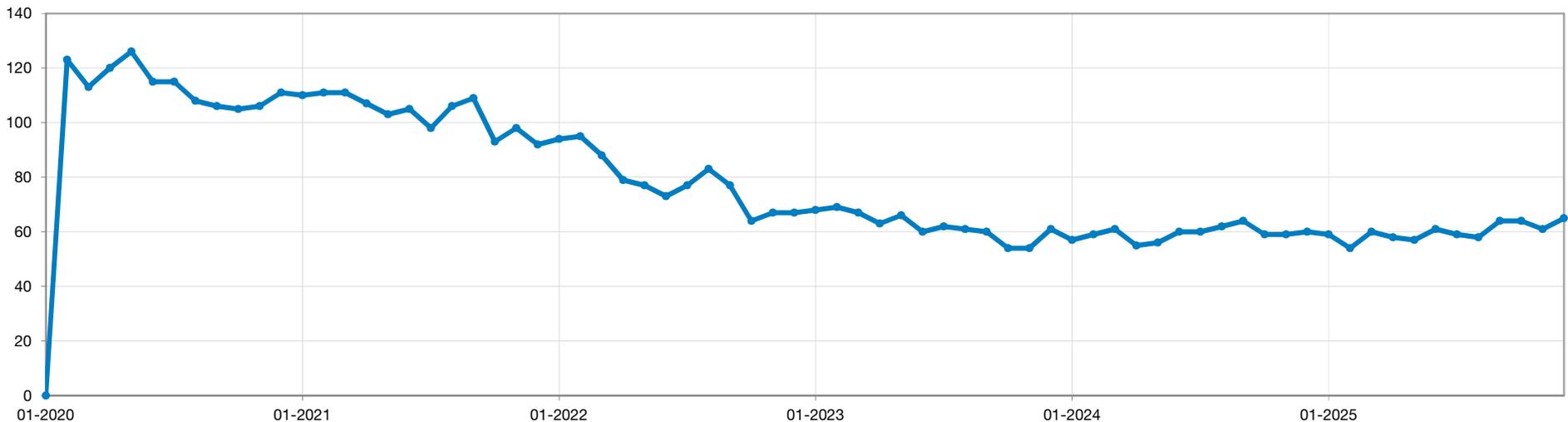


Year to Date



	Affordability Index	Prior Year	Percent Change
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%
November 2025	61	59	+3.4%
December 2025	65	60	+8.3%
12-Month Avg	60	59	+1.1%

Historical Housing Affordability Index by Month

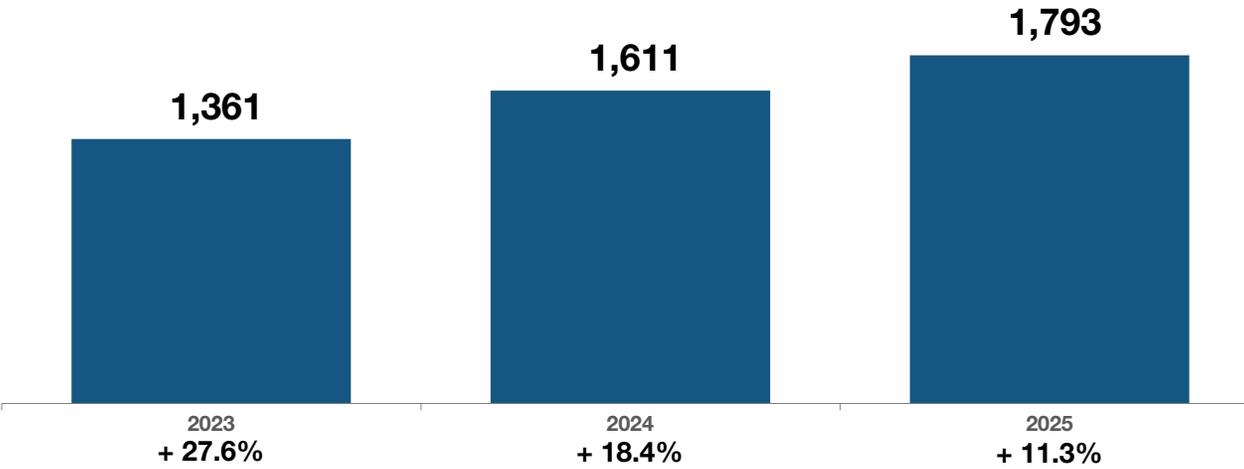


Inventory of Homes for Sale

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



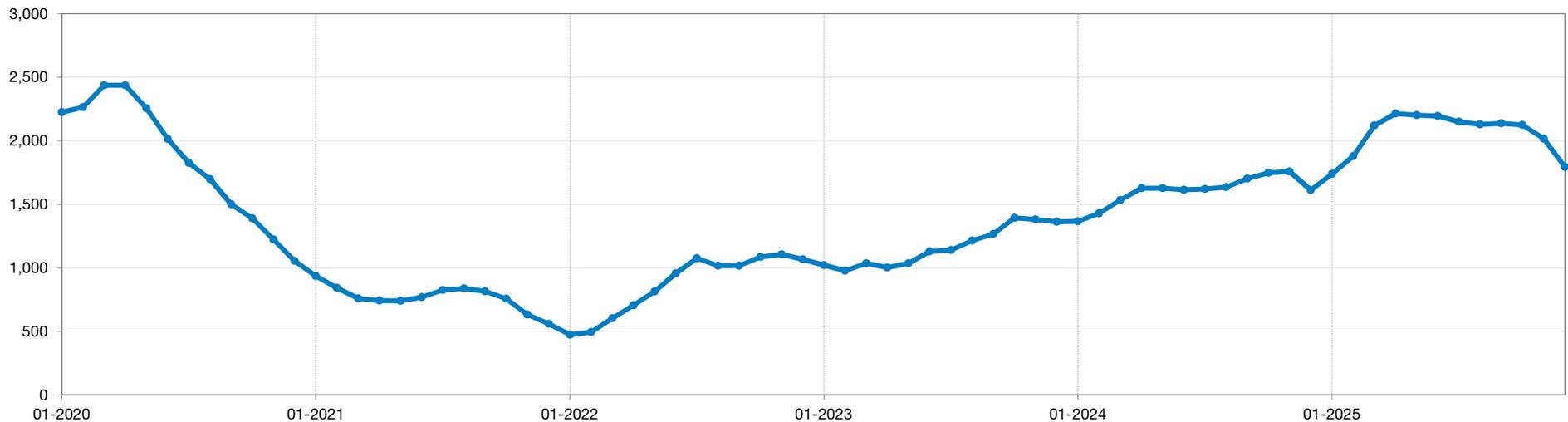
December



	Homes for Sale	Prior Year	Percent Change
January 2025	1,738	1,367	+27.1%
February 2025	1,878	1,429	+31.4%
March 2025	2,120	1,533	+38.3%
April 2025	2,214	1,626	+36.2%
May 2025	2,201	1,627	+35.3%
June 2025	2,194	1,614	+35.9%
July 2025	2,149	1,619	+32.7%
August 2025	2,127	1,634	+30.2%
September 2025	2,137	1,701	+25.6%
October 2025	2,123	1,746	+21.6%
November 2025	2,016	1,758	+14.7%
December 2025	1,793	1,611	+11.3%
12-Month Avg*	2,058	1,605	+28.2%

* Homes for Sale for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Historical Inventory of Homes for Sale by Month

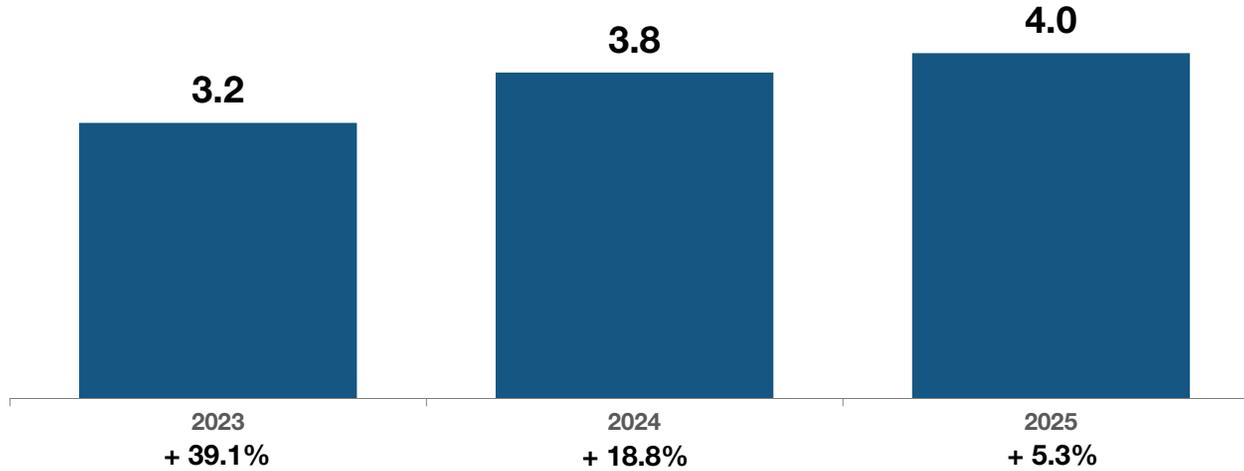


Months Supply of Inventory

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.



December



Months Supply		Prior Year	Percent Change
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	4.8	4.1	+17.1%
October 2025	4.7	4.1	+14.6%
November 2025	4.5	4.2	+7.1%
December 2025	4.0	3.8	+5.3%
12-Month Avg*	4.8	3.8	+26.3%

* Months Supply for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month

