

Housing Supply Overview

A RESEARCH TOOL PROVIDED BY SOUTH CAROLINA REALTORS®



December 2025

U.S. pending home sales climbed to their highest level in nearly three years, rising 3.3% month-over-month, according to the National Association of REALTORS®. Economists polled by Reuters had forecast a 1.0% increase in contract signings. On a year-over-year basis, pending home sales advanced 2.6%, with both monthly and annual gains recorded across all four regions. For the 12-month period spanning January 2025 through December 2025, Pending Sales in the Hilton Head Association of REALTORS® region increased 5.0 percent overall. The price range with the largest pending sales gain was the \$250,001 to \$350,000 range, where sales were up 13.4 percent.

The overall Median Sales Price increased 0.6 percent to \$545,000. The property type with the largest gain was the Single-Family Homes segment, where prices rose 3.4 percent to \$599,000. The price range that tended to sell the quickest was the \$750,001 to \$1,000,000 range at 82 days. The price range that tended to sell the slowest was the \$150,000 and Below range at 110 days.

Market-wide, inventory levels rose 11.3 percent. The property type with the largest gain was the Condos segment, where the number of properties for sale increased 13.4 percent. That amounts to 3.6 months of inventory for Single-Family Homes and 4.9 months of inventory for Condos.

Quick Facts

+ 13.4%

Price Range with
Strongest Sales:
\$250,001 to \$350,000

+ 14.6%

Bedroom Count with
Strongest Sales:
4 Bedrooms or More

+ 8.2%

Property Type With
Strongest Sales:
Single-Family Homes

| | |
|--------------------------------|----------|
| Pending Sales | 2 |
| Closed Sales | 3 |
| Days On Market Until Sale | 4 |
| Median Sales Price | 5 |
| Percent of List Price Received | 6 |
| Inventory of Homes for Sale | 7 |
| Months Supply of Inventory | 8 |



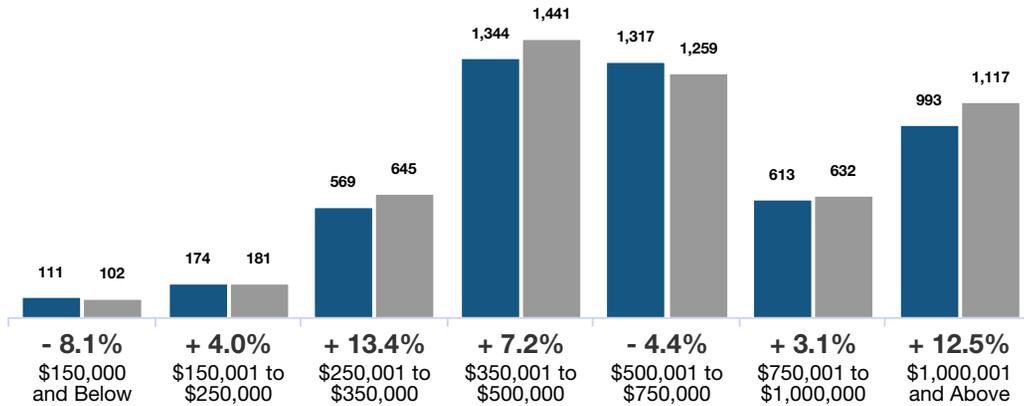
Pending Sales

A count of properties on which offers have been accepted. **Based on a rolling 12-month total.**



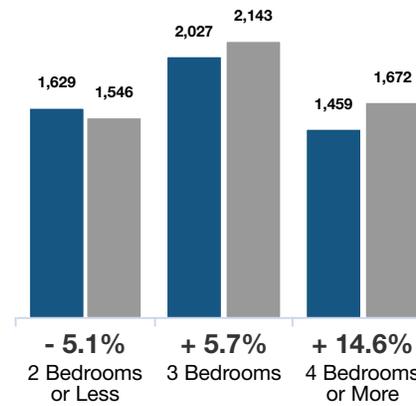
By Price Range

■ 12-2024 ■ 12-2025



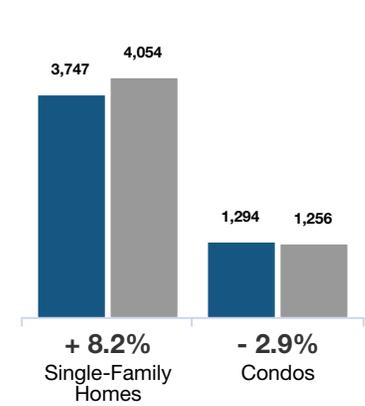
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 111 | 102 | - 8.1% |
| \$150,001 to \$250,000 | 174 | 181 | + 4.0% |
| \$250,001 to \$350,000 | 569 | 645 | + 13.4% |
| \$350,001 to \$500,000 | 1,344 | 1,441 | + 7.2% |
| \$500,001 to \$750,000 | 1,317 | 1,259 | - 4.4% |
| \$750,001 to \$1,000,000 | 613 | 632 | + 3.1% |
| \$1,000,001 and Above | 993 | 1,117 | + 12.5% |
| All Price Ranges | 5,121 | 5,377 | + 5.0% |

Single-Family Homes

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 1,629 | 1,546 | - 5.1% |
| 3 Bedrooms | 2,027 | 2,143 | + 5.7% |
| 4 Bedrooms or More | 1,459 | 1,672 | + 14.6% |
| All Bedroom Counts | 5,121 | 5,377 | + 5.0% |

Condos

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 27 | 27 | 0.0% |
| \$150,001 to \$250,000 | 49 | 52 | + 6.1% |
| \$250,001 to \$350,000 | 265 | 338 | + 27.5% |
| \$350,001 to \$500,000 | 1,054 | 1,151 | + 9.2% |
| \$500,001 to \$750,000 | 985 | 975 | - 1.0% |
| \$750,001 to \$1,000,000 | 470 | 504 | + 7.2% |
| \$1,000,001 and Above | 897 | 1,007 | + 12.3% |
| All Price Ranges | 3,747 | 4,054 | + 8.2% |

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 1,629 | 1,546 | - 5.1% |
| 3 Bedrooms | 2,027 | 2,143 | + 5.7% |
| 4 Bedrooms or More | 1,459 | 1,672 | + 14.6% |
| All Bedroom Counts | 5,121 | 5,377 | + 5.0% |

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 8 | 15 | + 87.5% |
| \$150,001 to \$250,000 | 124 | 126 | + 1.6% |
| \$250,001 to \$350,000 | 304 | 307 | + 1.0% |
| \$350,001 to \$500,000 | 289 | 290 | + 0.3% |
| \$500,001 to \$750,000 | 330 | 282 | - 14.5% |
| \$750,001 to \$1,000,000 | 143 | 126 | - 11.9% |
| \$1,000,001 and Above | 96 | 110 | + 14.6% |
| All Price Ranges | 1,294 | 1,256 | - 2.9% |

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 735 | 681 | - 7.3% |
| 3 Bedrooms | 1,626 | 1,761 | + 8.3% |
| 4 Bedrooms or More | 1,385 | 1,603 | + 15.7% |
| All Bedroom Counts | 3,747 | 4,054 | + 8.2% |

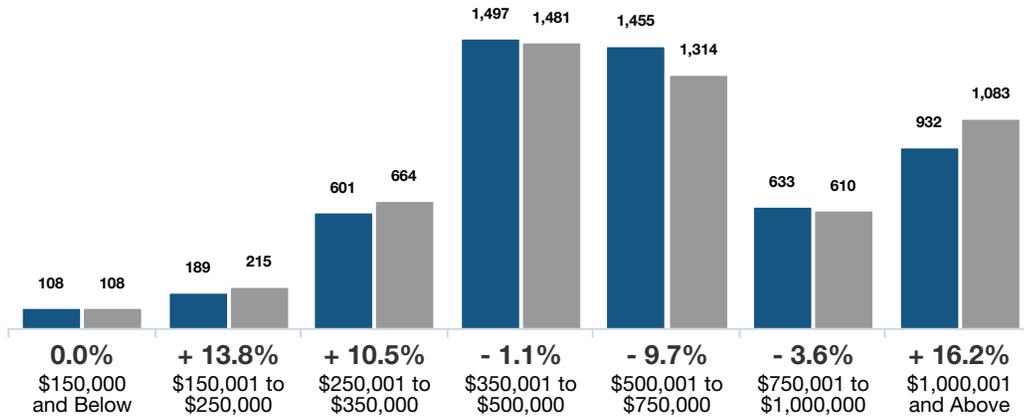
Closed Sales

A count of the actual sales that closed. **Based on a rolling 12-month total.**



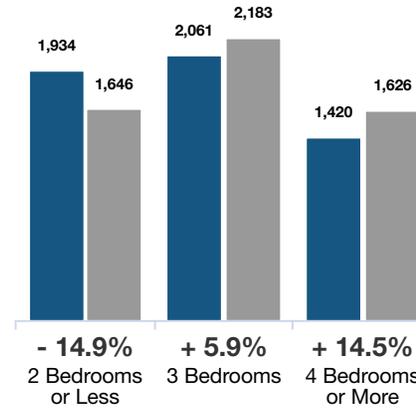
By Price Range

■ 12-2024 ■ 12-2025



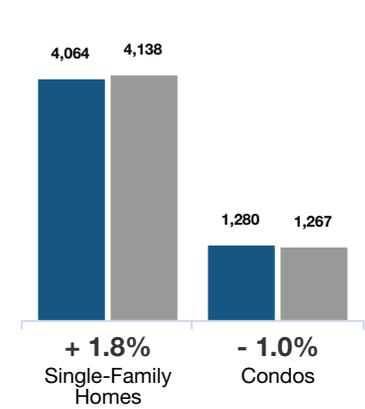
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 108 | 108 | 0.0% |
| \$150,001 to \$250,000 | 189 | 215 | + 13.8% |
| \$250,001 to \$350,000 | 601 | 664 | + 10.5% |
| \$350,001 to \$500,000 | 1,497 | 1,481 | - 1.1% |
| \$500,001 to \$750,000 | 1,455 | 1,314 | - 9.7% |
| \$750,001 to \$1,000,000 | 633 | 610 | - 3.6% |
| \$1,000,001 and Above | 932 | 1,083 | + 16.2% |
| All Price Ranges | 5,415 | 5,475 | + 1.1% |

Single-Family Homes

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 30 | 29 | - 3.3% |
| \$150,001 to \$250,000 | 45 | 56 | + 24.4% |
| \$250,001 to \$350,000 | 287 | 352 | + 22.6% |
| \$350,001 to \$500,000 | 1,222 | 1,210 | - 1.0% |
| \$500,001 to \$750,000 | 1,149 | 1,021 | - 11.1% |
| \$750,001 to \$1,000,000 | 490 | 496 | + 1.2% |
| \$1,000,001 and Above | 841 | 974 | + 15.8% |
| All Price Ranges | 4,064 | 4,138 | + 1.8% |

Condos

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 9 | 16 | + 77.8% |
| \$150,001 to \$250,000 | 144 | 157 | + 9.0% |
| \$250,001 to \$350,000 | 314 | 312 | - 0.6% |
| \$350,001 to \$500,000 | 275 | 270 | - 1.8% |
| \$500,001 to \$750,000 | 304 | 291 | - 4.3% |
| \$750,001 to \$1,000,000 | 143 | 112 | - 21.7% |
| \$1,000,001 and Above | 91 | 109 | + 19.8% |
| All Price Ranges | 1,280 | 1,267 | - 1.0% |

By Bedroom Count

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 1,934 | 1,646 | - 14.9% |
| 3 Bedrooms | 2,061 | 2,183 | + 5.9% |
| 4 Bedrooms or More | 1,420 | 1,626 | + 14.5% |
| All Bedroom Counts | 5,415 | 5,475 | + 1.1% |

Single-Family Homes

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 1,046 | 781 | - 25.3% |
| 3 Bedrooms | 1,659 | 1,800 | + 8.5% |
| 4 Bedrooms or More | 1,359 | 1,549 | + 14.0% |
| All Bedroom Counts | 4,064 | 4,138 | + 1.8% |

Condos

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 835 | 825 | - 1.2% |
| 3 Bedrooms | 387 | 358 | - 7.5% |
| 4 Bedrooms or More | 58 | 73 | + 25.9% |
| All Bedroom Counts | 1,280 | 1,267 | - 1.0% |

Days On Market Until Sale

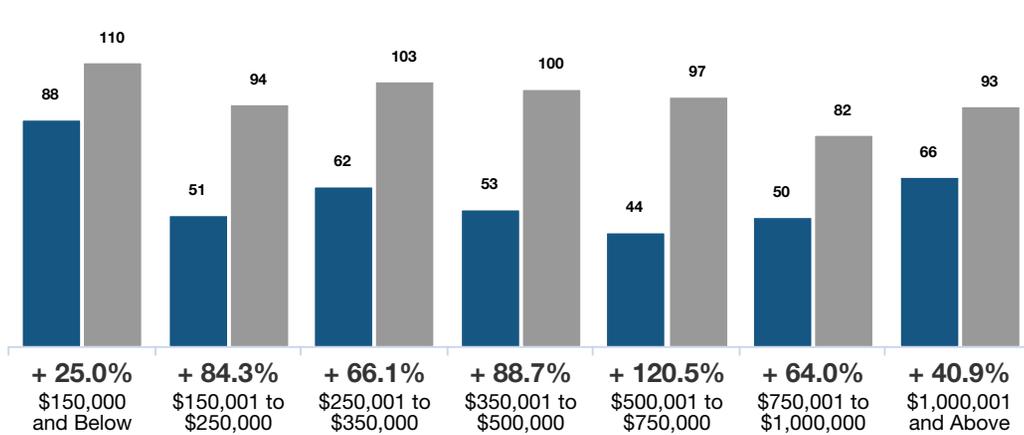
Average number of days between when a property is listed and when an offer is accepted.

Based on a rolling 12-month average.



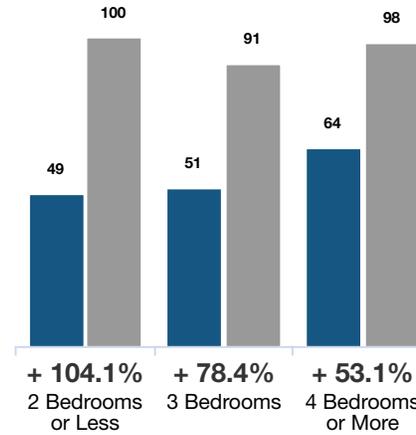
By Price Range

■ 12-2024 ■ 12-2025



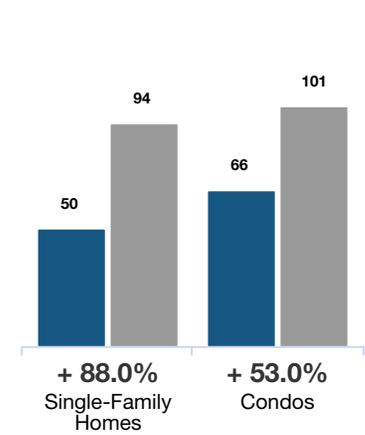
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|-----------|-----------|----------------|
| \$150,000 and Below | 88 | 110 | + 25.0% |
| \$150,001 to \$250,000 | 51 | 94 | + 84.3% |
| \$250,001 to \$350,000 | 62 | 103 | + 66.1% |
| \$350,001 to \$500,000 | 53 | 100 | + 88.7% |
| \$500,001 to \$750,000 | 44 | 97 | + 120.5% |
| \$750,001 to \$1,000,000 | 50 | 82 | + 64.0% |
| \$1,000,001 and Above | 66 | 93 | + 40.9% |
| All Price Ranges | 54 | 96 | + 77.8% |

Single-Family Homes

| | 12-2024 | 12-2025 | Change |
|--------------------------------|-----------|-----------|----------------|
| | 73 | 82 | + 12.3% |
| | 48 | 89 | + 85.4% |
| | 42 | 93 | + 121.4% |
| | 49 | 97 | + 98.0% |
| | 39 | 95 | + 143.6% |
| | 51 | 82 | + 60.8% |
| | 65 | 95 | + 46.2% |
| All Single-Family Homes | 50 | 94 | + 88.0% |

Condos

| | 12-2024 | 12-2025 | Change |
|-------------------|-----------|------------|----------------|
| | 35 | 62 | + 77.1% |
| | 52 | 93 | + 78.8% |
| | 80 | 114 | + 42.5% |
| | 68 | 113 | + 66.2% |
| | 63 | 102 | + 61.9% |
| | 45 | 80 | + 77.8% |
| | 73 | 79 | + 8.2% |
| All Condos | 66 | 101 | + 53.0% |

By Bedroom Count

| | 12-2024 | 12-2025 | Change |
|---------------------------|-----------|-----------|----------------|
| 2 Bedrooms or Less | 49 | 100 | + 104.1% |
| 3 Bedrooms | 51 | 91 | + 78.4% |
| 4 Bedrooms or More | 64 | 98 | + 53.1% |
| All Bedroom Counts | 54 | 96 | + 77.8% |

Single-Family Homes

| | 12-2024 | 12-2025 | Change |
|--------------------------------|-----------|-----------|----------------|
| | 33 | 89 | + 169.7% |
| | 47 | 92 | + 95.7% |
| | 65 | 98 | + 50.8% |
| All Single-Family Homes | 50 | 94 | + 88.0% |

Condos

| | 12-2024 | 12-2025 | Change |
|-------------------|-----------|------------|----------------|
| | 66 | 107 | + 62.1% |
| | 67 | 89 | + 32.8% |
| | 56 | 94 | + 67.9% |
| All Condos | 66 | 101 | + 53.0% |

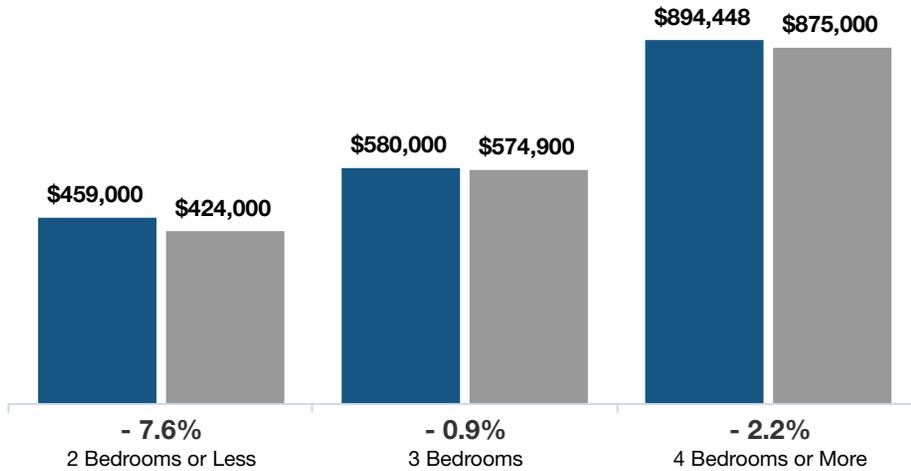
Median Sales Price

Median price point for all closed sales, not accounting for seller concessions. **Based on a rolling 12-month median.**



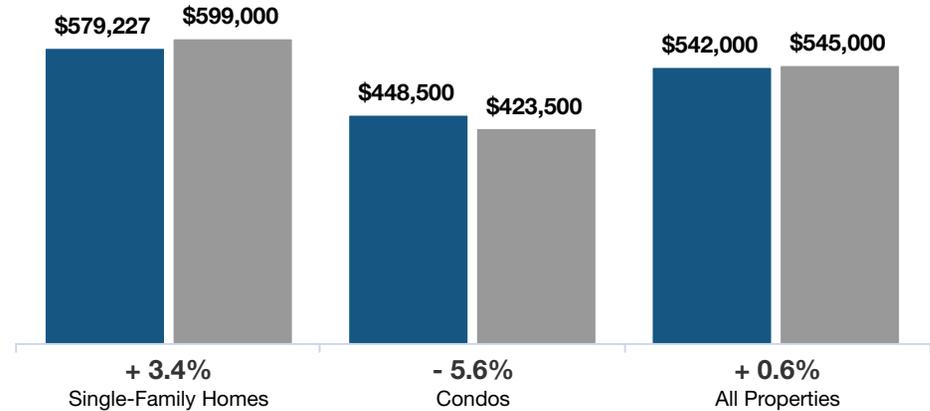
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

By Bedroom Count

| | 12-2024 | 12-2025 | Change |
|---------------------------|------------------|------------------|---------------|
| 2 Bedrooms or Less | \$459,000 | \$424,000 | - 7.6% |
| 3 Bedrooms | \$580,000 | \$574,900 | - 0.9% |
| 4 Bedrooms or More | \$894,448 | \$875,000 | - 2.2% |
| All Bedroom Counts | \$542,000 | \$545,000 | + 0.6% |

Single-Family Homes

| | 12-2024 | 12-2025 | Change |
|--------------------------------|------------------|------------------|---------------|
| Single-Family Homes | \$483,660 | \$470,000 | - 2.8% |
| Single-Family Homes | \$595,000 | \$580,000 | - 2.5% |
| Single-Family Homes | \$900,000 | \$893,000 | - 0.8% |
| All Single-Family Homes | \$579,227 | \$599,000 | + 3.4% |

Condos

| | 12-2024 | 12-2025 | Change |
|-------------------|------------------|------------------|---------------|
| Condos | \$385,000 | \$360,000 | - 6.5% |
| Condos | \$519,000 | \$552,600 | + 6.5% |
| Condos | \$700,000 | \$749,000 | + 7.0% |
| All Condos | \$448,500 | \$423,500 | - 5.6% |

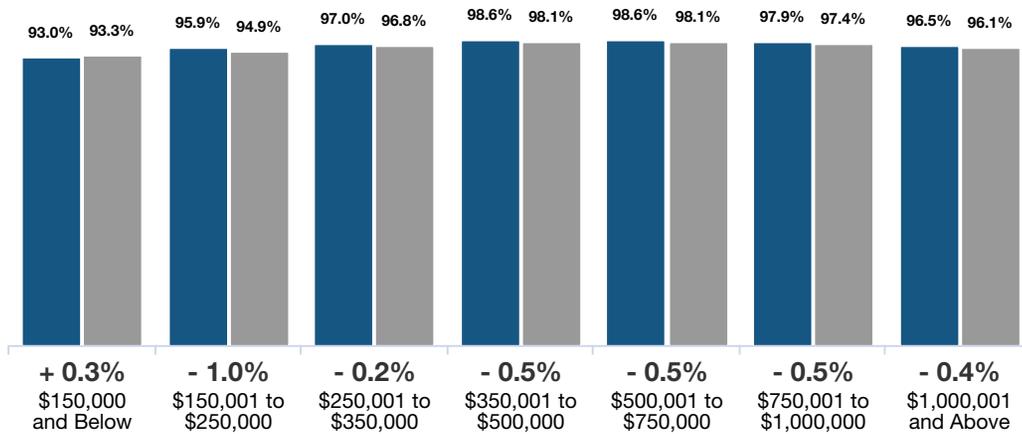
Percent of List Price Received



Percentage found when dividing a property's sales price by its last list price, then taking the average for all properties sold, not accounting for seller concessions. **Based on a rolling 12-month average.**

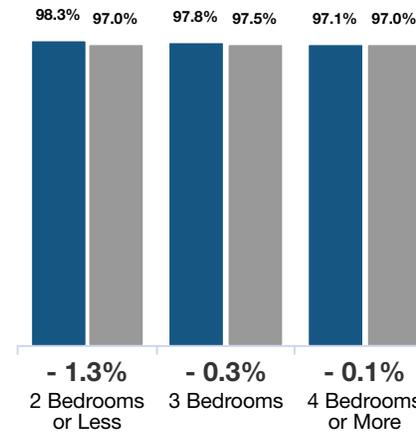
By Price Range

■ 12-2024 ■ 12-2025



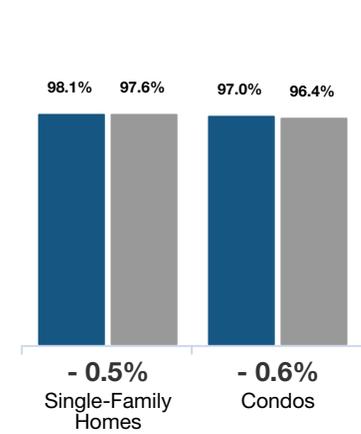
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 93.0% | 93.3% | + 0.3% |
| \$150,001 to \$250,000 | 95.9% | 94.9% | - 1.0% |
| \$250,001 to \$350,000 | 97.0% | 96.8% | - 0.2% |
| \$350,001 to \$500,000 | 98.6% | 98.1% | - 0.5% |
| \$500,001 to \$750,000 | 98.6% | 98.1% | - 0.5% |
| \$750,001 to \$1,000,000 | 97.9% | 97.4% | - 0.5% |
| \$1,000,001 and Above | 96.5% | 96.1% | - 0.4% |
| All Price Ranges | 97.8% | 97.2% | - 0.6% |

Single-Family Homes

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 98.3% | 97.0% | - 1.3% |
| 3 Bedrooms | 97.8% | 97.5% | - 0.3% |
| 4 Bedrooms or More | 97.1% | 97.0% | - 0.1% |
| All Bedroom Counts | 97.8% | 97.2% | - 0.6% |

Condos

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 93.3% | 100.4% | + 7.6% |
| \$150,001 to \$250,000 | 96.1% | 94.8% | - 1.4% |
| \$250,001 to \$350,000 | 97.5% | 97.1% | - 0.4% |
| \$350,001 to \$500,000 | 99.0% | 98.4% | - 0.6% |
| \$500,001 to \$750,000 | 99.0% | 98.4% | - 0.6% |
| \$750,001 to \$1,000,000 | 97.9% | 97.4% | - 0.5% |
| \$1,000,001 and Above | 96.4% | 96.0% | - 0.4% |
| All Price Ranges | 98.1% | 97.6% | - 0.5% |

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|--------------|--------------|---------------|
| \$150,000 and Below | 95.6% | 88.1% | - 7.8% |
| \$150,001 to \$250,000 | 95.8% | 95.0% | - 0.8% |
| \$250,001 to \$350,000 | 96.6% | 96.4% | - 0.2% |
| \$350,001 to \$500,000 | 97.1% | 96.7% | - 0.4% |
| \$500,001 to \$750,000 | 97.3% | 97.0% | - 0.3% |
| \$750,001 to \$1,000,000 | 97.8% | 97.4% | - 0.4% |
| \$1,000,001 and Above | 97.8% | 96.4% | - 1.4% |
| All Price Ranges | 97.0% | 96.4% | - 0.6% |

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|--------------|--------------|---------------|
| 2 Bedrooms or Less | 99.8% | 98.6% | - 1.2% |
| 3 Bedrooms | 97.9% | 97.6% | - 0.3% |
| 4 Bedrooms or More | 97.1% | 97.0% | - 0.1% |
| All Bedroom Counts | 98.1% | 97.6% | - 0.5% |

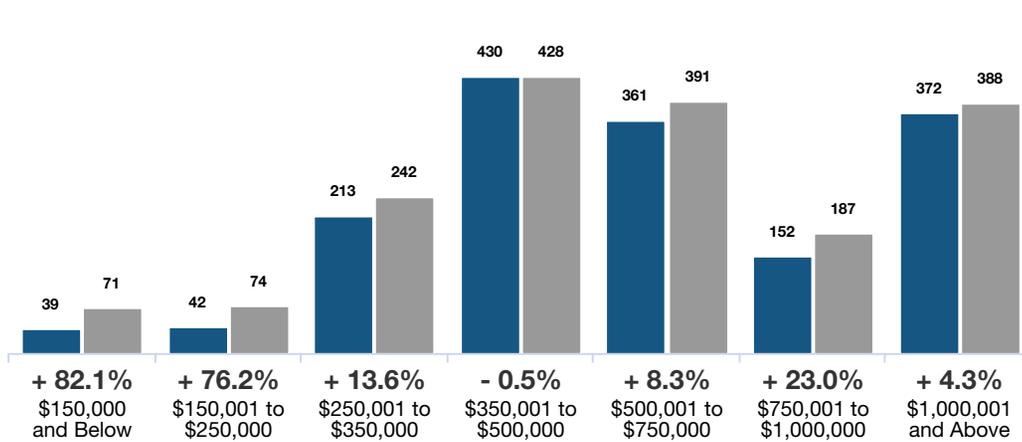
Inventory of Homes for Sale



The number of properties available for sale in active status at the end of the most recent month. **Based on one month of activity.**

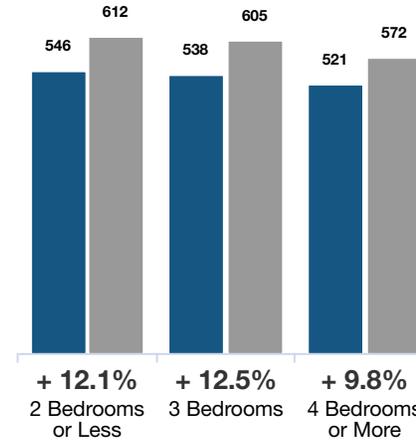
By Price Range

■ 12-2024 ■ 12-2025



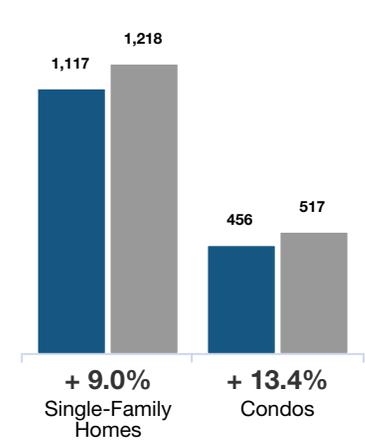
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



| | All Properties | | | Single-Family Homes | | | Condos | | |
|---------------------------|----------------|--------------|----------------|---------------------|--------------|---------------|------------|------------|----------------|
| By Price Range | 12-2024 | 12-2025 | Change | 12-2024 | 12-2025 | Change | 12-2024 | 12-2025 | Change |
| \$150,000 and Below | 39 | 71 | + 82.1% | 5 | 9 | + 80.0% | 0 | 6 | — |
| \$150,001 to \$250,000 | 42 | 74 | + 76.2% | 17 | 12 | - 29.4% | 24 | 62 | + 158.3% |
| \$250,001 to \$350,000 | 213 | 242 | + 13.6% | 76 | 84 | + 10.5% | 137 | 157 | + 14.6% |
| \$350,001 to \$500,000 | 430 | 428 | - 0.5% | 295 | 318 | + 7.8% | 135 | 110 | - 18.5% |
| \$500,001 to \$750,000 | 361 | 391 | + 8.3% | 257 | 278 | + 8.2% | 102 | 113 | + 10.8% |
| \$750,001 to \$1,000,000 | 152 | 187 | + 23.0% | 121 | 156 | + 28.9% | 30 | 30 | 0.0% |
| \$1,000,001 and Above | 372 | 388 | + 4.3% | 344 | 353 | + 2.6% | 28 | 35 | + 25.0% |
| All Price Ranges | 1,611 | 1,793 | + 11.3% | 1,117 | 1,218 | + 9.0% | 456 | 517 | + 13.4% |
| By Bedroom Count | 12-2024 | 12-2025 | Change | 12-2024 | 12-2025 | Change | 12-2024 | 12-2025 | Change |
| 2 Bedrooms or Less | 546 | 612 | + 12.1% | 190 | 194 | + 2.1% | 324 | 367 | + 13.3% |
| 3 Bedrooms | 538 | 605 | + 12.5% | 431 | 480 | + 11.4% | 105 | 119 | + 13.3% |
| 4 Bedrooms or More | 521 | 572 | + 9.8% | 495 | 540 | + 9.1% | 22 | 31 | + 40.9% |
| All Bedroom Counts | 1,611 | 1,793 | + 11.3% | 1,117 | 1,218 | + 9.0% | 456 | 517 | + 13.4% |

Months Supply of Inventory

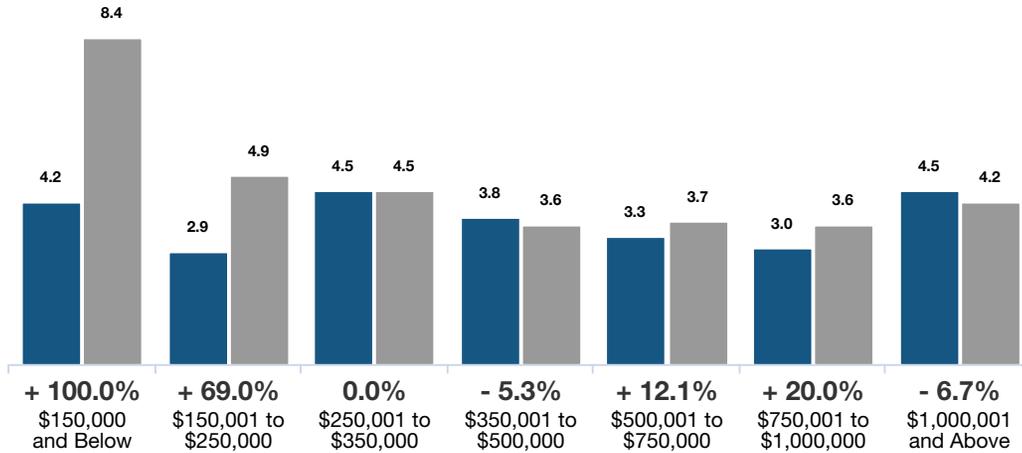


The inventory of homes for sale at the end of the most recent month, divided by the average monthly pending sales from the last 12 months.

Based on one month of activity.

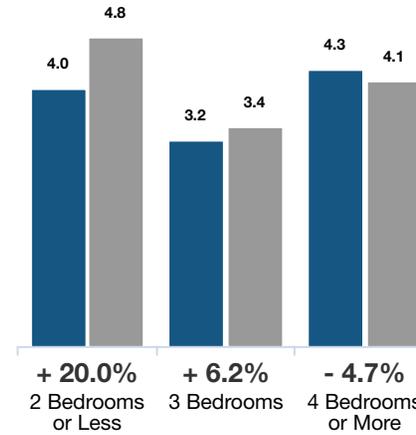
By Price Range

■ 12-2024 ■ 12-2025



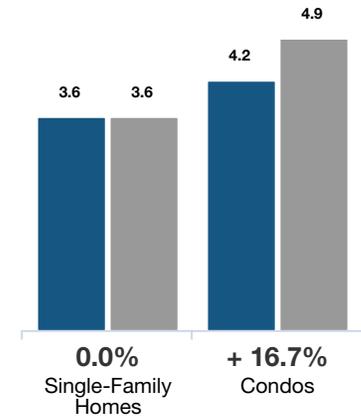
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|------------|------------|---------------|
| \$150,000 and Below | 4.2 | 8.4 | + 100.0% |
| \$150,001 to \$250,000 | 2.9 | 4.9 | + 69.0% |
| \$250,001 to \$350,000 | 4.5 | 4.5 | 0.0% |
| \$350,001 to \$500,000 | 3.8 | 3.6 | - 5.3% |
| \$500,001 to \$750,000 | 3.3 | 3.7 | + 12.1% |
| \$750,001 to \$1,000,000 | 3.0 | 3.6 | + 20.0% |
| \$1,000,001 and Above | 4.5 | 4.2 | - 6.7% |
| All Price Ranges | 3.8 | 4.0 | + 5.3% |

Single-Family Homes

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|------------|------------|-------------|
| \$150,000 and Below | 2.2 | 3.7 | + 68.2% |
| \$150,001 to \$250,000 | 4.2 | 2.5 | - 40.5% |
| \$250,001 to \$350,000 | 3.4 | 3.0 | - 11.8% |
| \$350,001 to \$500,000 | 3.4 | 3.3 | - 2.9% |
| \$500,001 to \$750,000 | 3.1 | 3.4 | + 9.7% |
| \$750,001 to \$1,000,000 | 3.1 | 3.7 | + 19.4% |
| \$1,000,001 and Above | 4.6 | 4.2 | - 8.7% |
| All Price Ranges | 3.6 | 3.6 | 0.0% |

Condos

| By Price Range | 12-2024 | 12-2025 | Change |
|--------------------------|------------|------------|----------------|
| \$150,000 and Below | — | 2.4 | — |
| \$150,001 to \$250,000 | 2.3 | 5.9 | + 156.5% |
| \$250,001 to \$350,000 | 5.4 | 6.1 | + 13.0% |
| \$350,001 to \$500,000 | 5.6 | 4.6 | - 17.9% |
| \$500,001 to \$750,000 | 3.7 | 4.8 | + 29.7% |
| \$750,001 to \$1,000,000 | 2.5 | 2.9 | + 16.0% |
| \$1,000,001 and Above | 3.5 | 3.8 | + 8.6% |
| All Price Ranges | 4.2 | 4.9 | + 16.7% |

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|------------|------------|---------------|
| 2 Bedrooms or Less | 4.0 | 4.8 | + 20.0% |
| 3 Bedrooms | 3.2 | 3.4 | + 6.2% |
| 4 Bedrooms or More | 4.3 | 4.1 | - 4.7% |
| All Bedroom Counts | 3.8 | 4.0 | + 5.3% |

| By Bedroom Count | 12-2024 | 12-2025 | Change |
|---------------------------|------------|------------|-------------|
| 2 Bedrooms or Less | 3.1 | 3.4 | + 9.7% |
| 3 Bedrooms | 3.2 | 3.3 | + 3.1% |
| 4 Bedrooms or More | 4.3 | 4.0 | - 7.0% |
| All Bedroom Counts | 3.6 | 3.6 | 0.0% |