

Annual Report on the Hilton Head Housing Market

A FREE RESEARCH TOOL FROM THE HILTON HEAD AREA ASSOCIATION OF REALTORS®



2025

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The U.S. housing market navigated a challenging landscape throughout 2025. Mortgage rates remained elevated compared with recent years, and home prices continued to rise nationwide. Demand for affordable housing far outpaced supply, and with fewer buyers able to keep up with rising costs, sales of previously owned homes were subdued. Younger buyers faced steep hurdles as high rents, inflation, and student loan debt limited their ability to save for a down payment. By mid-2025, first-time buyers accounted for just 21% of all home purchases, while the typical age of a first-time buyer reached a record high of 40, according to the National Association of REALTORS® (NAR). This aging trend extended across the broader market, as the median age of all homebuyers reached 59. NAR data show that homeowners also set a record, staying in their homes a median of 11 years before selling.

With sales activity down, inventory continued to edge higher, and homes spent more time on the market compared with the previous year, signaling a shift toward more balanced market conditions. The rise in supply has given buyers more options and reduced the sense of urgency that characterized the post-pandemic market, while sellers have rediscovered the importance of strategic pricing, especially in areas where inventory growth is strongest. Although price appreciation has slowed, home values remain roughly 50% higher than pre-pandemic levels, stretching budgets and prompting many would-be buyers to delay their home search until affordability increases.

Sales: Pending sales increased 5.0 percent, finishing 2025 at 5,377. Closed sales were up 1.1 percent to end the year at 5,475.

Listings: Comparing 2025 to the prior year, the number of homes available for sale was up by 11.3 percent. There were 1,793 active listings at the end of the year. New listings increased by 10.5 percent to finish the year at 7,384.

Prices: Home prices were up compared to last year. The overall median sales price increased 0.6 percent to \$545,000 for the year. Detached home prices were down 5.6 percent compared to last year, while Attached home prices were up 3.4 percent.

List Price Received: Sellers received, on average, 97.2 percent of their original list price at sale, a year-over-year decrease of 0.6 percent. Detached homes received 96.4 percent of their list price, while Attached homes received 97.6 percent of the list price.

Looking ahead to 2026, experts are forecasting an improvement in market activity. Mortgage rates declined through the second half of 2025 and are expected to stay in the 6% range in the year ahead, supporting incremental gains in affordability. As inventory builds, sales volume is projected to increase. Economists anticipate modest increases in home prices, well below the rapid appreciation of recent years. While conditions should become somewhat more favorable for buyers, affordability constraints and the effects of a decade-long supply shortfall will continue to shape the market. Taken together, these trends suggest 2026 will be a year of stabilization and recovery, rather than dramatic change.

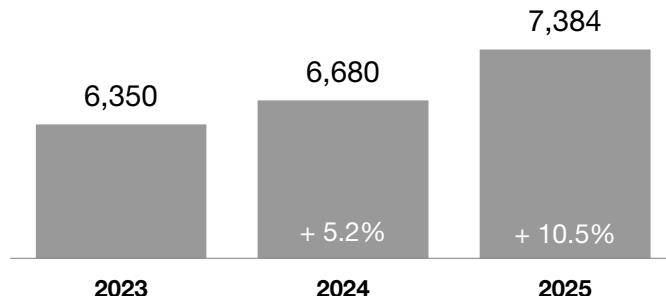
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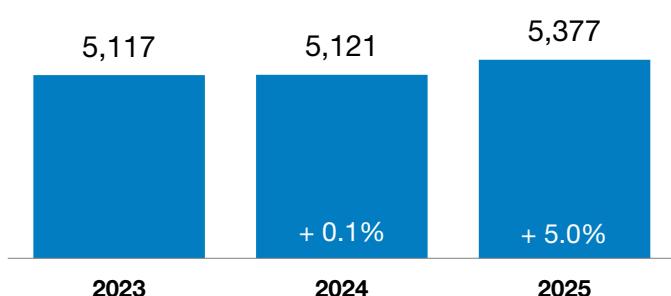
Quick Facts



New Listings



Pending Sales



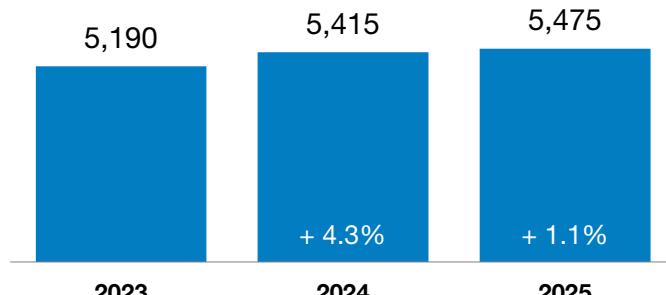
Top 5 Areas: Change in New Listings from 2024

Bamberg County	+ 56.4%
Berkeley Hall	+ 50.0%
Moss Creek	+ 36.5%
Colleton River	+ 35.6%
Long Cove	+ 33.3%

Bottom 5 Areas: Change in New Listings from 2024

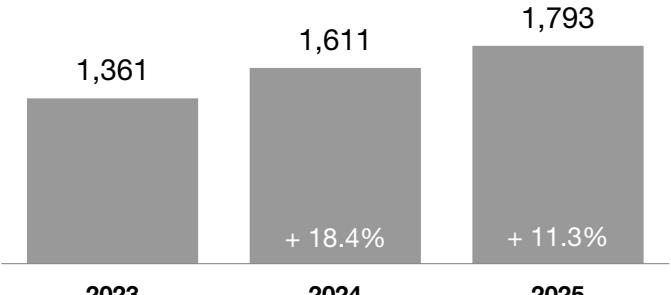
Hampton Hall	- 19.7%
Spanish Wells	- 27.3%
Colleton County	- 42.9%
Allendale County	- 44.4%
Barnwell County	- 66.7%

Closed Sales



Inventory of Homes for Sale

At the end of the year.



Top 5 Areas: Change in Closed Sales from 2024

Riverton Pointe	+ 188.0%
Colleton River	+ 108.7%
Bamberg County	+ 72.2%
Long Cove	+ 52.0%
Jasper County	+ 49.8%

Bottom 5 Areas: Change in Closed Sales from 2024

Spanish Wells	- 33.3%
Daufuskie Island	- 35.0%
Hampton County	- 42.9%
Spring Island	- 52.4%
Barnwell County	- 66.7%

Top 5 Areas: Change in Homes for Sale from 2024

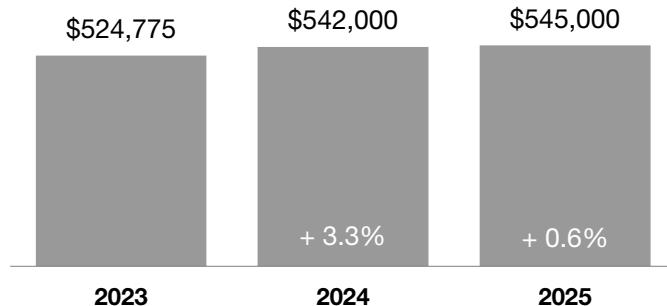
Hampton County	+ 144.4%
Berkeley Hall	+ 118.2%
Windmill Harbour	+ 100.0%
Spring Island	+ 75.0%
Hilton Head Lakes	+ 69.2%

Bottom 5 Areas: Change in Homes for Sale from 2024

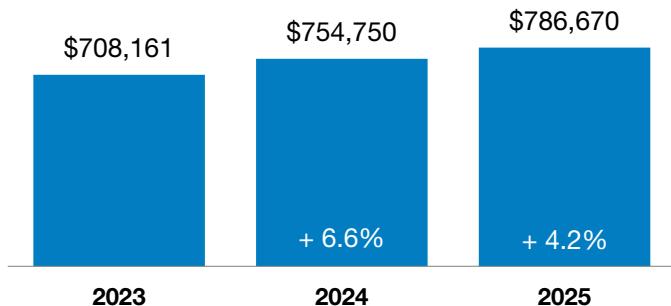
Long Cove	- 36.4%
Oldfield	- 41.2%
Indigo Run	- 50.0%
Wexford	- 54.5%
Allendale County	- 75.0%

Quick Facts

Median Sales Price



Average Sales Price



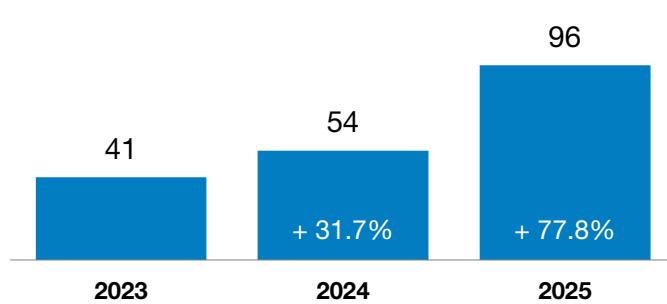
Top 5 Areas: Change in Median Sales Price from 2024

Hampton County	+ 64.6%
Oldfield	+ 34.4%
Windmill Harbour	+ 25.2%
Port Royal	+ 18.1%
Spring Island	+ 15.0%

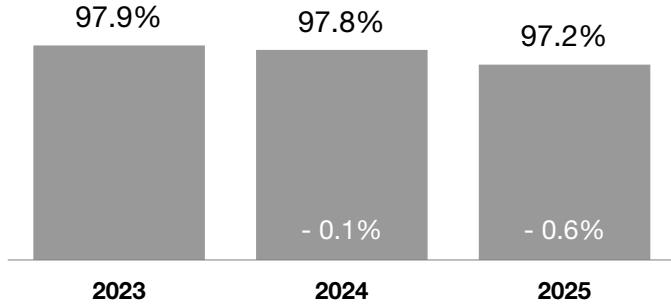
Bottom 5 Areas: Change in Median Sales Price from 2024

Bamberg County	- 25.1%
Daufuskie Island	- 25.4%
Colleton County	- 36.1%
Spanish Wells	- 56.0%
Barnwell County	- 77.8%

Days on Market Until Sale



Percent of List Price Received



Top 5 Areas: Change in Days on Market from 2024

Allendale County	+ 214.7%
Belfair	+ 182.9%
Fripp Island	+ 178.6%
Indigo Run	+ 140.0%
Hampton Lake	+ 134.0%

Bottom 5 Areas: Change in Days on Market from 2024

Palmetto Bluff	+ 20.6%
Barnwell County	+ 18.8%
Colleton County	+ 18.3%
Colleton River	+ 17.6%
Daufuskie Island	- 13.5%

Top 5 Areas: Change in Pct. of List Price Received from 2024

Colleton County	+ 3.9%
Fripp Island	+ 2.0%
Moss Creek	+ 1.4%
Hampton Hall	+ 1.0%
Jasper County	+ 0.8%

Bottom 5 Areas: Change in Pct. of List Price Received from 2024

Belfair	- 2.7%
Allendale County	- 4.7%
Spanish Wells	- 5.2%
Bamberg County	- 5.5%
Barnwell County	- 21.0%

Price Range Review

**\$750,001 to
\$1,000,000**

 Price Range with
Shortest Average
Market Time

**\$150,000 and
Below**

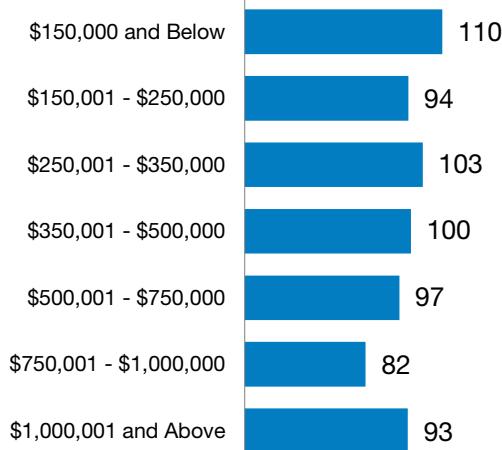
 Price Range with
Longest Average
Market Time

21.6%
+ 4.3%

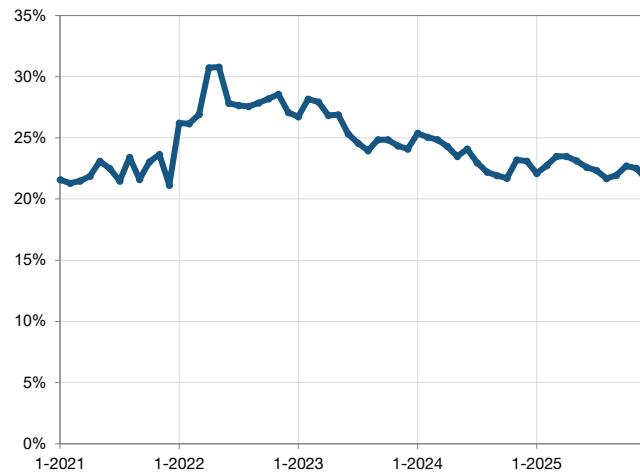
 Homes for Sale
at Year End Priced
\$1,000,001 and Above

 One-Year Change
in Homes for Sale Priced
\$1,000,001 and Above

Cumulative Days on Market Until Sale by Price Range



Share of Homes for Sale \$1,000,001 and Above


**\$350,001 to
\$500,000**

 Price Range with the
Most Closed Sales

+ 16.2%

 Price Range with Strongest
One-Year Change in Sales:
\$1,000,001 and Above

**\$150,000 and
Below**

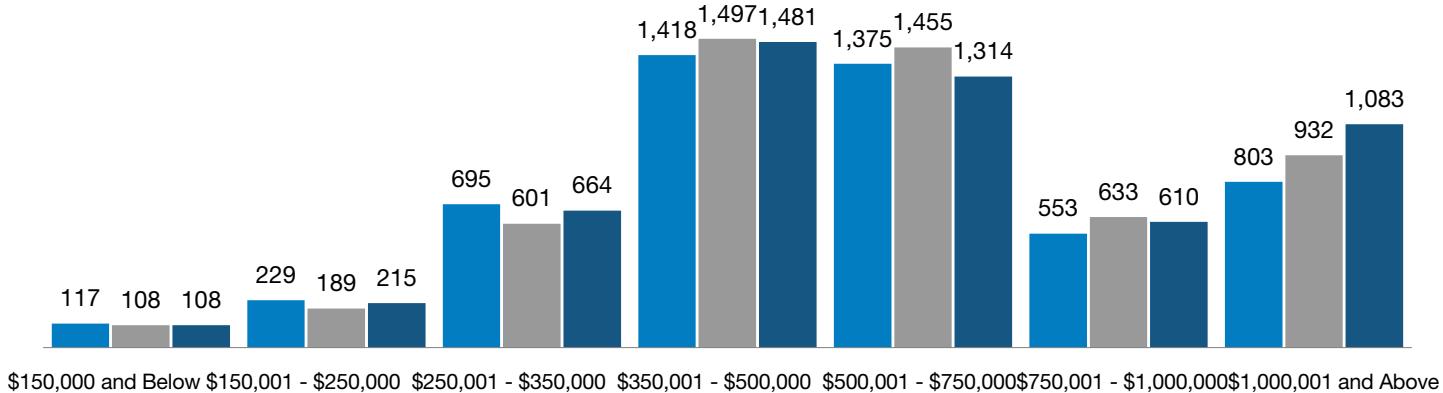
 Price Range with the
Fewest Closed Sales

- 9.7%

 Price Range with Weakest
One-Year Change in Sales:
\$500,001 - \$750,000

Closed Sales by Price Range

■ 2023 ■ 2024 ■ 2025



Property Type Review



94

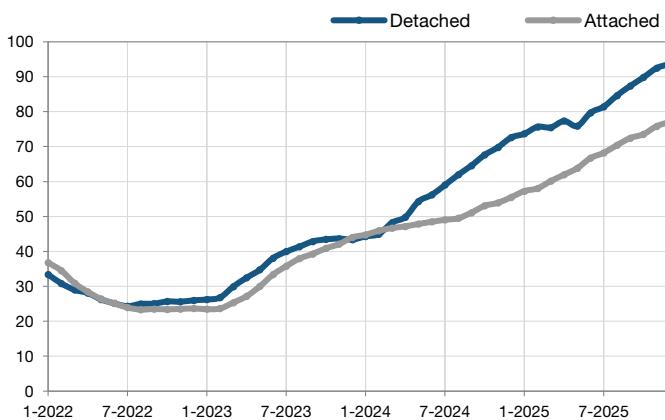
Average Cumulative Days
on Market
Detached

77

Average Cumulative Days
on Market
Attached

Days on Market Until Sale

This chart uses a rolling 12-month average for each data point.



- 5.6%

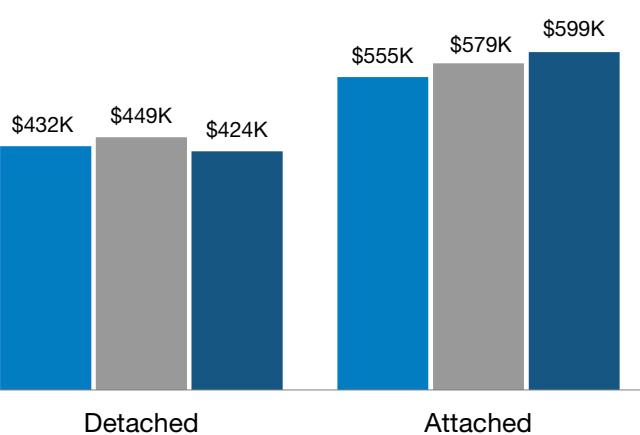
One-Year Change in Price
Detached

+ 3.4%

One-Year Change in Price
Attached

Median Sales Price

■ 2023 ■ 2024 ■ 2025



Top Areas: Attached Market Share in 2025

Folly Field	90.4%
Forest Beach	85.6%
Shipyard	72.0%
HH General	67.4%
Hilton Head Totals	47.4%
Windmill Harbour	43.5%
Sea Pines	38.9%
Riverton Pointe	38.9%
Beaufort Co - S of Broad River	27.5%
Daufuskie Island	25.6%
Bluffton General	18.6%
Hampton Hall	18.4%
Fripp Island	17.6%
Mainland	11.5%

96.4%

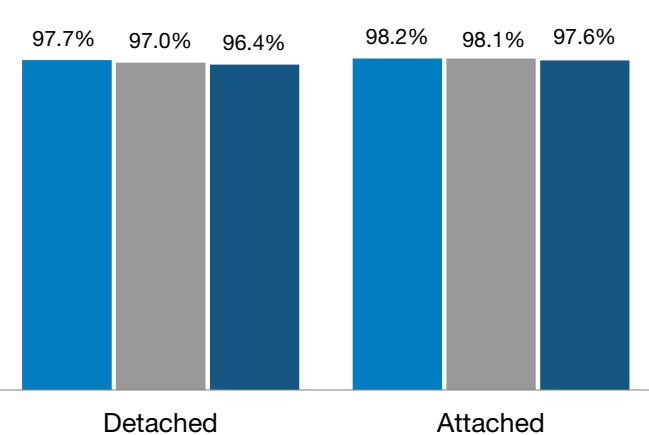
Pct. of List Price Received
Detached

97.6%

Pct. of List Price Received
Attached

Percent of List Price Received

■ 2023 ■ 2024 ■ 2025



Area Overviews



	Total Closed Sales	Change from 2024	Percent Attached	Percent Distressed	Months Supply of Inventory	Days on Market	Pct. of List Price Received
Sea Pines	321	+ 14.6%	60.1%	0.3%	2.7	79	96.5%
Forest Beach	188	- 8.3%	14.4%	0.0%	5.3	111	95.6%
Shipyard	93	- 8.8%	14.0%	0.0%	4.3	101	96.5%
Wexford	42	+ 31.3%	92.9%	0.0%	1.3	97	95.8%
Long Cove	38	+ 52.0%	100.0%	0.0%	1.6	108	95.3%
Palmetto Dunes	206	- 2.8%	30.1%	0.0%	3.5	89	96.7%
Folly Field	104	+ 19.5%	9.6%	0.0%	8.1	149	96.1%
Port Royal (Excludes Equity Share Properties)	61	+ 32.6%	82.0%	0.0%	3.4	92	96.7%
Hilton Head Plantation	228	- 0.4%	88.6%	0.0%	2.2	59	97.1%
Palmetto Hall	15	- 21.1%	100.0%	0.0%	1.8	78	97.5%
Indigo Run	63	+ 23.5%	87.3%	0.0%	0.6	72	97.1%
Spanish Wells	4	- 33.3%	100.0%	0.0%	4.0	269	91.7%
Windmill Harbour	23	- 4.2%	56.5%	0.0%	3.0	86	95.5%
14: HH General (Condos / Villas)	236	- 7.1%	100.0%	0.0%	5.9	86	96.0%
14: HH General (Detached)	236	- 7.1%	0.0%	0.0%	5.9	86	96.0%
Daufuskie Island	39	-35.0%	74.4%	0.0%	10.4	109	93.6%
Bluffton General	1,069	+5.7%	81.4%	0.5%	2.9	93	97.6%
Moss Creek	78	+32.2%	93.6%	0.0%	2.5	74	97.2%
Colleton River	48	+108.7%	100.0%	0.0%	3.6	127	95.0%
Belfair	49	+2.1%	100.0%	0.0%	5.3	116	94.7%
Rose Hill	47	-13.0%	97.9%	0.0%	3.5	100	96.6%
Berkeley Hall	36	+16.1%	100.0%	0.0%	7.8	77	96.0%
Palmetto Bluff	81	-19.8%	100.0%	0.0%	7.2	129	95.0%
Sun City / Riverbend	735	+25.6%	93.3%	0.0%	3.3	97	97.7%
Oldfield	41	-2.4%	100.0%	0.0%	2.7	94	95.8%
Callawassie Island	35	+9.4%	100.0%	0.0%	12.0	183	94.4%
Spring Island	10	-52.4%	100.0%	0.0%	9.8	151	94.1%
Beaufort Co - N of Broad River	341	-9.1%	93.5%	0.6%	5.6	92	97.1%
Beaufort Co - S of Broad River	4,172	6.5%	70.8%	0.2%	3.9	96	96.8%
Hampton Hall	49	-7.5%	81.6%	0.0%	4.3	123	97.2%
Riverton Pointe	72	+188.0%	61.1%	0.0%	5.5	131	98.5%
Hilton Head Lakes	70	+40.0%	100.0%	0.0%	4.1	80	98.3%
Hampton Lake	73	-18.9%	94.5%	1.4%	3.0	110	97.1%
Fripp Island	17	+13.3%	82.4%	0.0%	6.1	195	96.3%
Jasper County	325	+49.8%	93.5%	0.3%	4.3	113	99.0%
Allendale County	5	0.0%	100.0%	20.0%	1.0	107	95.3%
Barnwell County	1	-66.7%	100.0%	0.0%	0.0	19	73.5%
Colleton County	4	-20.0%	100.0%	0.0%	1.0	110	97.1%
Hampton County	16	-42.9%	100.0%	0.0%	11.7	116	94.4%
Orangeburg County	528	+ 1.0%	100.0%	50.0%	0.0	185	97.6%
Bamberg County	31	+ 72.2%	100.0%	25.0%	0.8	43	96.3%
Mainland	2,281	8.9%	88.5%	0.3%	3.6	100	97.3%

Area Historical Median Prices



	2022	2023	2024	2025	Change From 2024	Change From 2021
Sea Pines	\$940,000	\$963,000	\$1,137,500	\$1,295,000	+ 13.8%	+ 34.5%
Forest Beach	\$458,500	\$520,000	\$505,000	\$489,500	- 3.1%	- 5.9%
Shipyard	\$597,000	\$612,500	\$607,500	\$615,000	+ 1.2%	+ 0.4%
Wexford	\$2,200,000	\$2,250,000	\$2,300,000	\$2,387,500	+ 3.8%	+ 6.1%
Long Cove	\$1,175,000	\$1,437,500	\$1,200,000	\$1,292,250	+ 7.7%	- 10.1%
Palmetto Dunes	\$800,000	\$765,000	\$860,000	\$928,750	+ 8.0%	+ 21.4%
Folly Field	\$350,000	\$385,000	\$368,850	\$333,000	- 9.7%	- 13.5%
Port Royal (Excludes Equity Share Properties)	\$1,100,000	\$1,350,000	\$1,160,000	\$1,370,000	+ 18.1%	+ 1.5%
Hilton Head Plantation	\$775,000	\$859,000	\$860,000	\$867,500	+ 0.9%	+ 1.0%
Palmetto Hall	\$952,500	\$975,000	\$1,070,000	\$1,120,000	+ 4.7%	+ 14.9%
Indigo Run	\$918,400	\$1,068,750	\$1,068,750	\$1,165,000	+ 9.0%	+ 9.0%
Spanish Wells	\$1,550,000	\$1,550,000	\$4,445,000	\$1,957,500	- 56.0%	+ 26.3%
Windmill Harbour	\$735,000	\$882,000	\$1,050,000	\$1,315,000	+ 25.2%	+ 49.1%
14: HH General (Condos / Villas)	\$335,000	\$343,750	\$370,000	\$389,000	+ 5.1%	+ 13.2%
14: HH General (Detached)	\$285,000	\$318,250	\$318,000	\$315,000	- 0.9%	- 1.0%
Daufuskie Island	\$494,000	\$535,000	\$532,500	\$545,000	+ 2.3%	+ 1.9%
Bluffton General	\$415,000	\$460,000	\$468,667	\$460,000	- 1.8%	0.0%
Moss Creek	\$615,000	\$822,000	\$750,000	\$817,500	+ 9.0%	- 0.5%
Colleton River	\$1,540,000	\$1,797,500	\$2,100,000	\$2,150,000	+ 2.4%	+ 19.6%
Belfair	\$1,275,000	\$1,350,000	\$1,427,500	\$1,350,000	- 5.4%	0.0%
Rose Hill	\$649,900	\$599,850	\$711,250	\$700,000	- 1.6%	+ 16.7%
Berkeley Hall	\$1,209,500	\$1,097,500	\$1,495,000	\$1,643,750	+ 9.9%	+ 49.8%
Palmetto Bluff	\$2,130,636	\$2,260,185	\$2,695,000	\$2,395,000	- 11.1%	+ 6.0%
Sun City / Riverbend	\$465,000	\$510,000	\$505,000	\$487,565	- 3.5%	- 4.4%
Oldfield	\$1,007,836	\$935,000	\$930,000	\$1,250,000	+ 34.4%	+ 33.7%
Callawassie Island	\$790,500	\$824,494	\$1,022,500	\$1,075,000	+ 5.1%	+ 30.4%
Spring Island	\$1,575,000	\$1,800,000	\$1,895,000	\$2,180,000	+ 15.0%	+ 21.1%
Beaufort Co - N of Broad River	\$400,000	\$434,000	\$465,000	\$472,500	+ 1.6%	+ 8.9%
Beaufort Co - S of Broad River	\$528,700	\$590,000	\$610,171	\$615,000	+ 0.8%	+ 4.2%
Hampton Hall	\$755,000	\$965,000	\$1,035,000	\$1,050,000	+ 1.4%	+ 8.8%
Riverton Pointe	\$615,000	\$667,498	\$749,900	\$640,000	- 14.7%	- 4.1%
Hilton Head Lakes	\$330,101	\$395,495	\$391,196	\$375,000	- 4.1%	- 5.2%
Hampton Lake	\$857,000	\$894,670	\$882,500	\$950,000	+ 7.6%	+ 6.2%
Fripp Island	\$1,220,000	\$687,000	\$1,020,000	\$775,000	- 24.0%	+ 12.8%
Jasper County	\$278,500	\$324,990	\$354,000	\$361,990	+ 2.3%	+ 11.4%
Allendale County	\$29,000	\$35,000	\$65,000	\$61,000	- 6.2%	+ 74.3%
Barnwell County	\$303,000	\$110,000	\$225,000	\$50,000	- 77.8%	- 54.5%
Colleton County	\$127,500	\$235,000	\$162,500	\$267,500	+ 64.6%	+ 13.8%
Hampton County	\$127,500	\$235,000	\$162,500	\$267,500	+ 64.6%	+ 13.8%
Orangeburg County	\$207,600	\$0	\$0	\$210,500	--	--
Bamberg County	\$0	\$220,000	\$83,500	\$62,500	- 25.1%	- 71.6%
Mainland	\$480,000	\$535,000	\$540,390	\$530,340	- 1.9%	- 0.9%