Monthly Indicators

July 2026

U.S. existing-home sales declined 2.4% from the previous month to a seasonally adjusted annual rate of 4.09 million units, according to the National Association of REALTORS® (NAR). Regionally, sales increased in the Northeast but declined in the West, South, and Midwest. Compared to a year earlier, existing-home sales rose 2.8%, with gains in the Midwest, South, and West while remaining unchanged in the Northeast.

New Listings were down 9.4 percent to 523. Pending Sales increased 1.9 percent to 481. Inventory shrank 3.4 percent to 2,083 units.

Median Sales Price was down 7.3 percent to $510,000. Days on Market increased 28.9 percent to 125 days. Months Supply of Inventory was down 10.0 percent to 4.5 months.

Nationally, the median existing-home price hit a new record of $440,600, a 1.8% increase from a year earlier, NAR reported. Home prices have now increased on an annual basis for 36 consecutive months, reflecting continued demand despite inventory remaining below historically balanced levels. Heading into July, there were 1.56 million properties for sale, down 0.6% month-over-month but up 1.3% from the same period last year, representing a 4.6-month supply at the current sales pace. Homes spent a median of 28 days on the market, with first-time homebuyers accounting for 33% of home purchases.

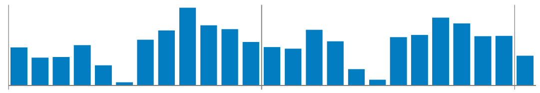
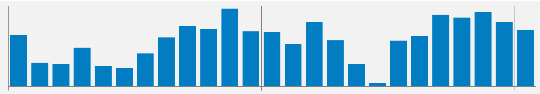
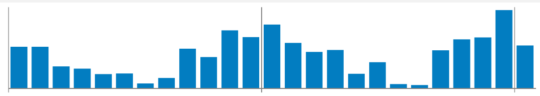
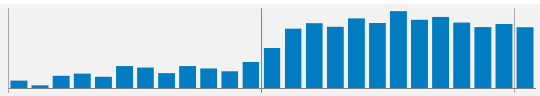
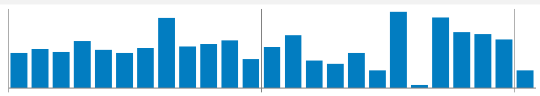
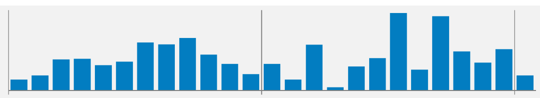
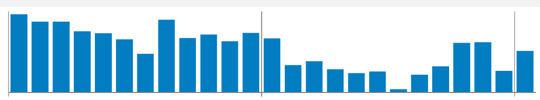
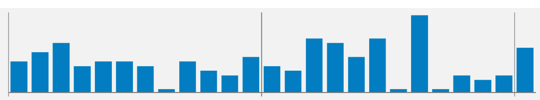
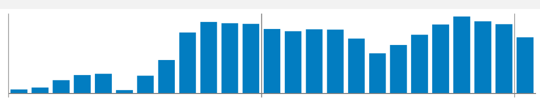
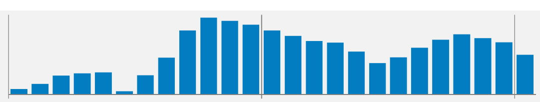
Quick Facts

- 12.8%	- 7.3%	- 10.0%
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 Area REALTORS®. Percent changes are calculated using rounded figures.

Market Overview

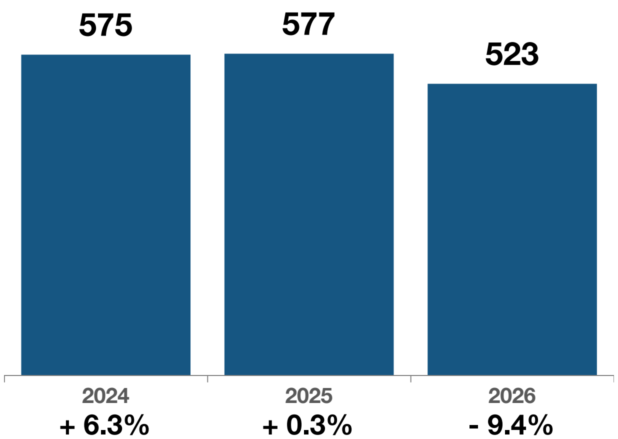
Key market metrics for the current month and year-to-date figures.

Key Metrics	Historical Sparkbars	07-2025	07-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		577	**523**	- 9.4%	4,720	**4,597**	- 2.6%
Pending Sales		472	**481**	+ 1.9%	3,330	**3,500**	+ 5.1%
Closed Sales		555	**484**	- 12.8%	3,247	**3,273**	+ 0.8%
Days on Market		97	**125**	+ 28.9%	74	**132**	+ 78.4%
Median Sales Price		$550,000	**$510,000**	- 7.3%	$555,000	**$557,500**	+ 0.5%
Average Sales Price		$775,783	**$740,200**	- 4.6%	$801,088	**$822,568**	+ 2.7%
Pct. of List Price Received		97.4%	**97.2%**	- 0.2%	97.5%	**97.0%**	- 0.5%
Housing Affordability Index		63	**67**	+ 6.3%	63	**61**	- 3.2%
Inventory of Homes for Sale		2,156	**2,083**	- 3.4%	--	**--**	--
Months Supply of Inventory		5.0	**4.5**	- 10.0%	--	**--**	--

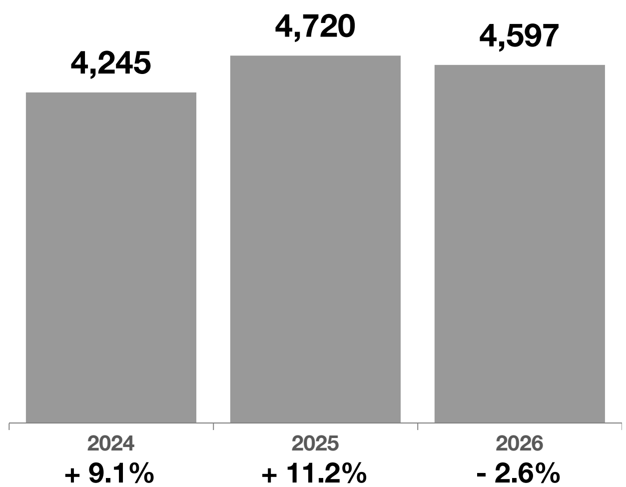
New Listings

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

July

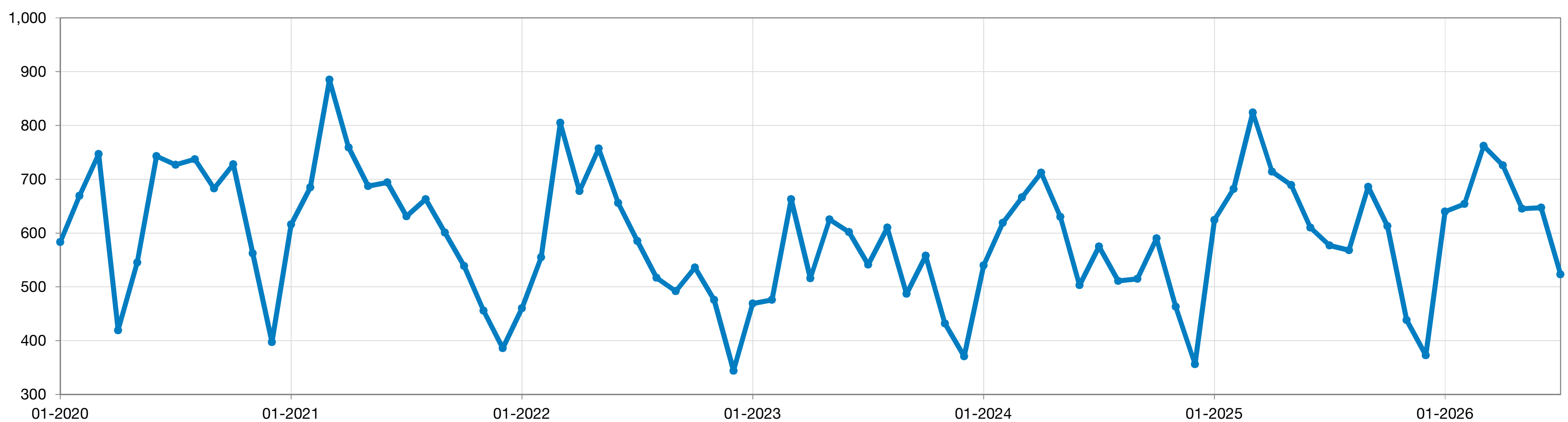


Year to Date



New Listings		Prior Year	Percent Change
August 2025	568	511	+11.2%
September 2025	686	515	+33.2%
October 2025	613	590	+3.9%
November 2025	438	463	-5.4%
December 2025	373	356	+4.8%
January 2026	640	624	+2.6%
February 2026	654	682	-4.1%
March 2026	762	824	-7.5%
April 2026	726	714	+1.7%
May 2026	645	689	-6.4%
June 2026	647	610	+6.1%
July 2026	**523**	**577**	**-9.4%**
12-Month Avg	606	596	+1.7%

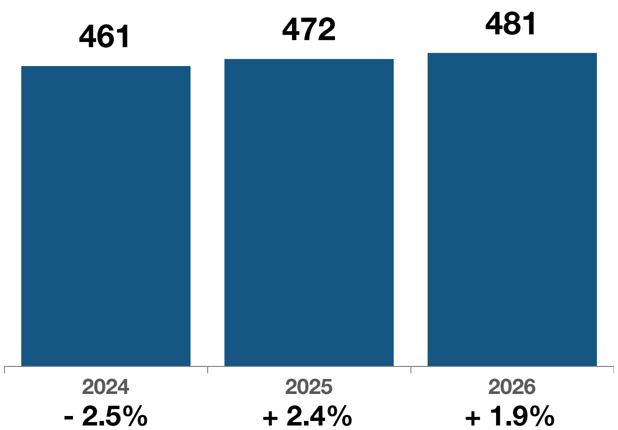
Historical New Listings by Month



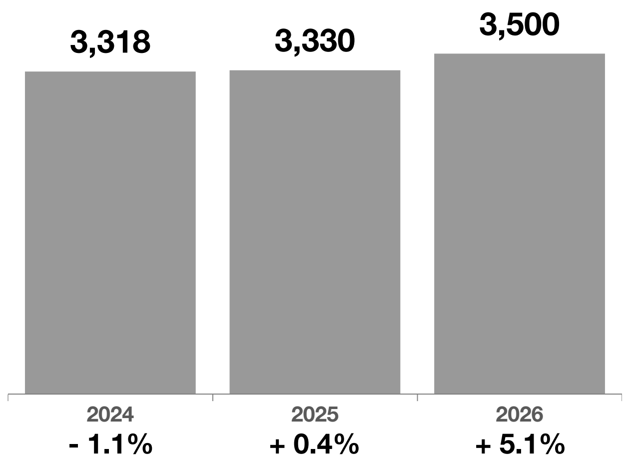
Pending Sales

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

July

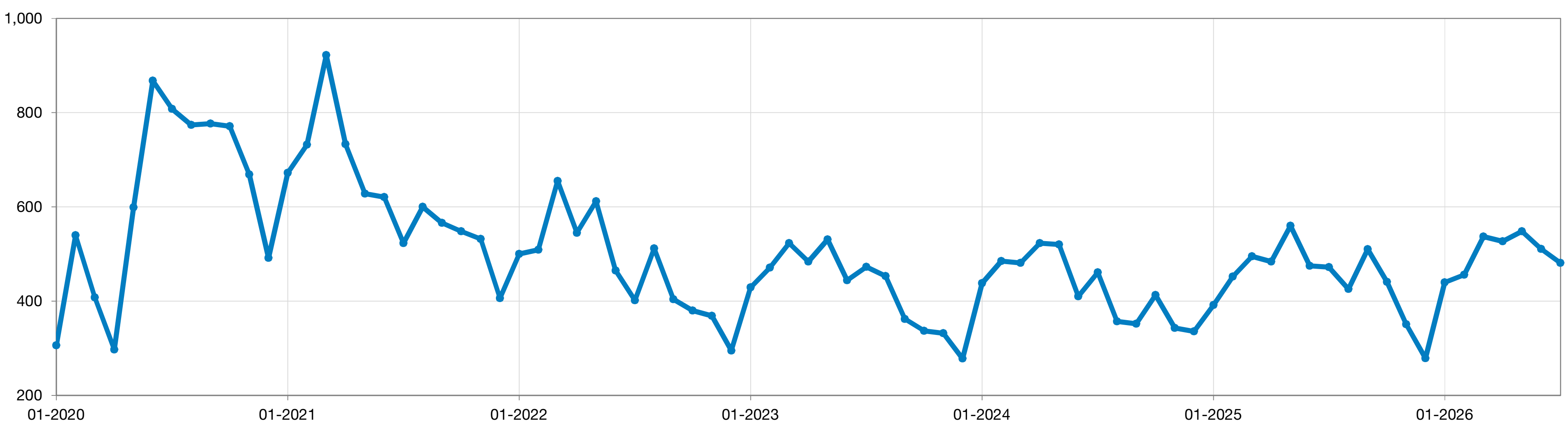


Year to Date



Pending Sales		Prior Year	Percent Change
August 2025	426	357	+19.3%
September 2025	510	352	+44.9%
October 2025	441	413	+6.8%
November 2025	351	343	+2.3%
December 2025	279	336	-17.0%
January 2026	440	392	+12.2%
February 2026	456	452	+0.9%
March 2026	537	495	+8.5%
April 2026	527	484	+8.9%
May 2026	548	560	-2.1%
June 2026	511	475	+7.6%
July 2026	**481**	**472**	**+1.9%**
12-Month Avg	459	428	+7.3%

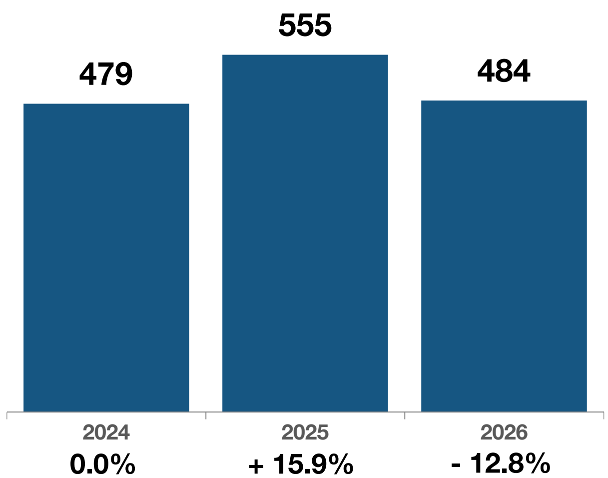
Historical Pending Sales by Month



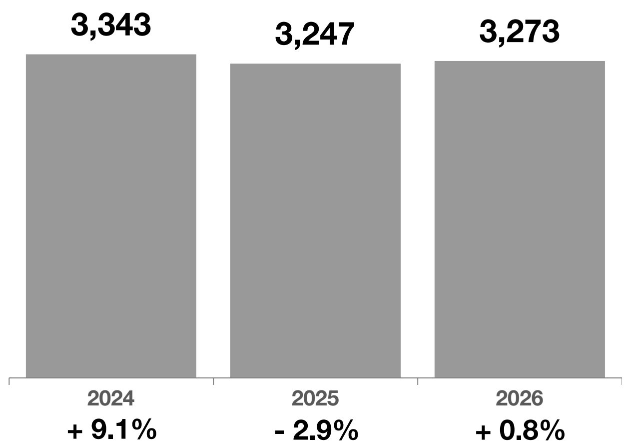
Closed Sales

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

July

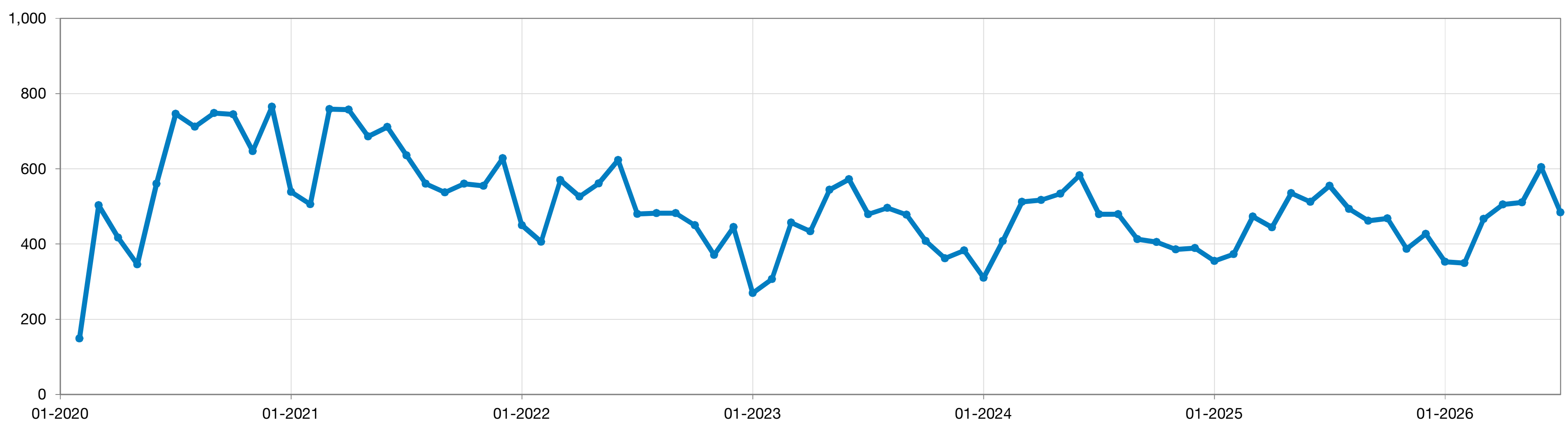


Year to Date



Closed Sales		Prior Year	Percent Change
August 2025	493	479	+2.9%
September 2025	462	413	+11.9%
October 2025	468	405	+15.6%
November 2025	387	386	+0.3%
December 2025	427	389	+9.8%
January 2026	353	355	-0.6%
February 2026	349	373	-6.4%
March 2026	467	473	-1.3%
April 2026	505	444	+13.7%
May 2026	511	535	-4.5%
June 2026	604	512	+18.0%
July 2026	**484**	**555**	**-12.8%**
12-Month Avg	459	443	+3.6%

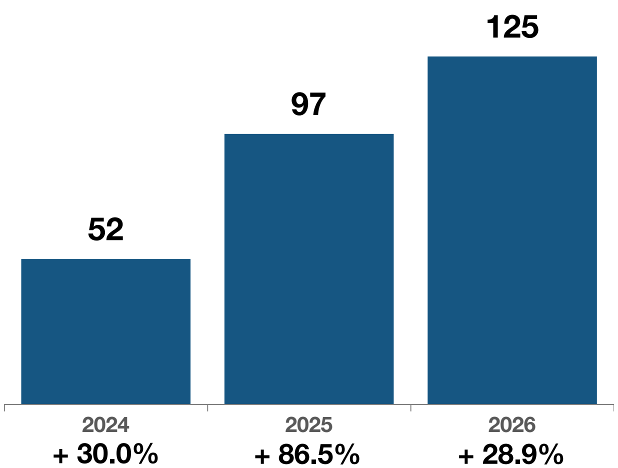
Historical Closed Sales by Month



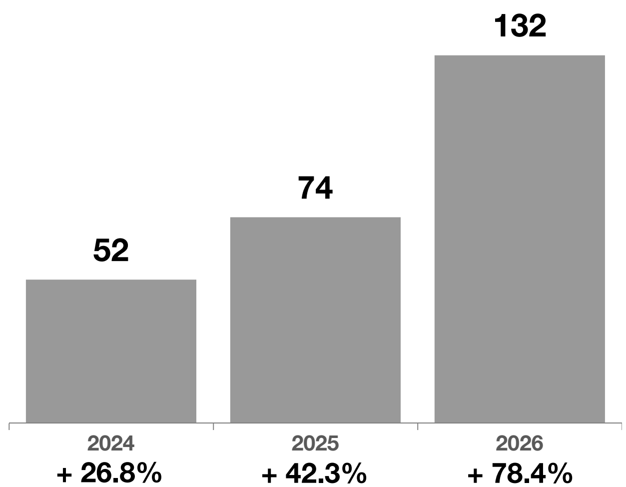
Days on Market Until Sale

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

July



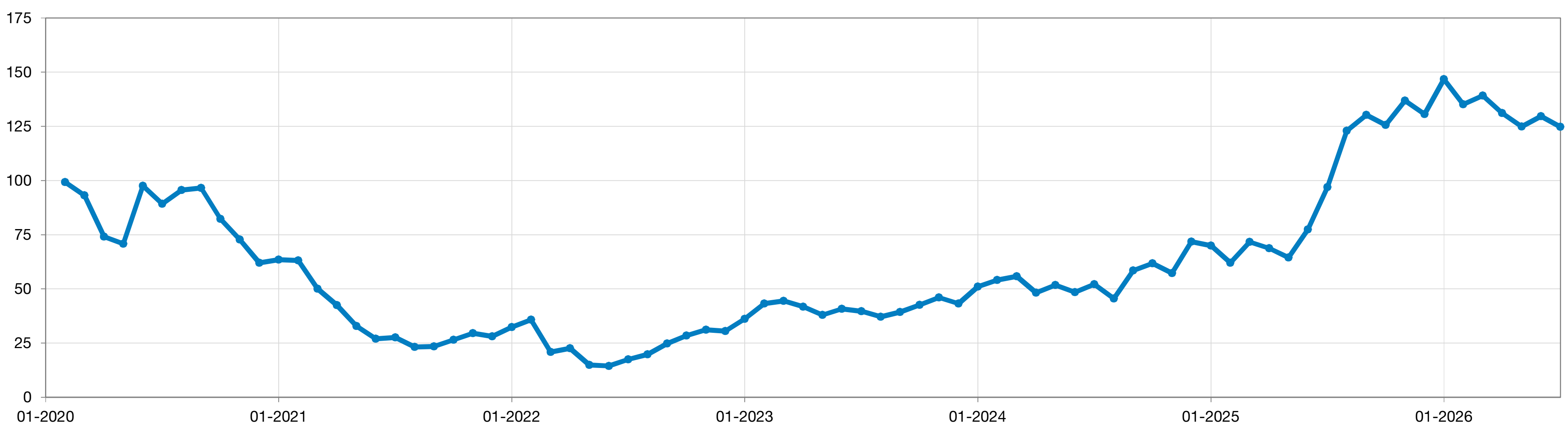
Year to Date



Days on Market		Prior Year	Percent Change
August 2025	123	45	+173.3%
September 2025	130	58	+124.1%
October 2025	126	62	+103.2%
November 2025	137	57	+140.4%
December 2025	131	72	+81.9%
January 2026	147	70	+110.0%
February 2026	135	62	+117.7%
March 2026	139	72	+93.1%
April 2026	131	69	+89.9%
May 2026	125	64	+95.3%
June 2026	130	77	+68.8%
July 2026	**125**	**97**	**+28.9%**
12-Month Avg*	131	68	+92.6%

* Average Days on Market of all properties from August 2025 through July 2026. This is not the average of the individual figures above.

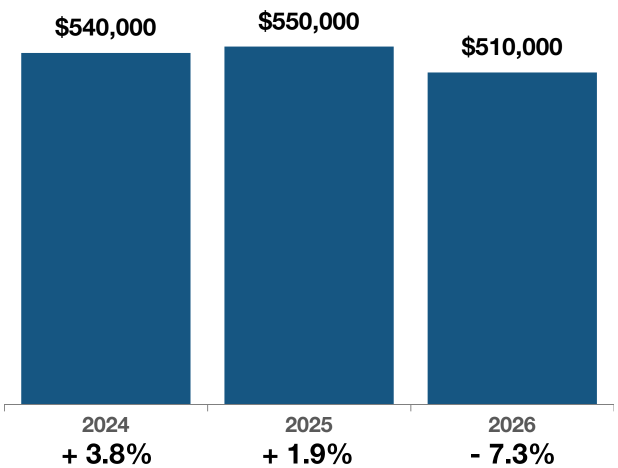
Historical Days on Market Until Sale by Month



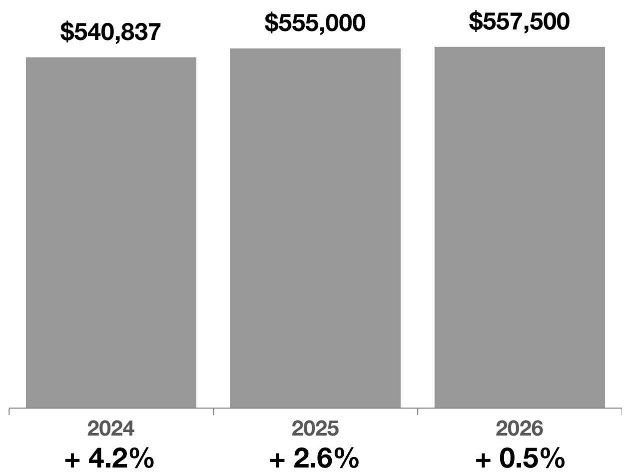
Median Sales Price

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

July



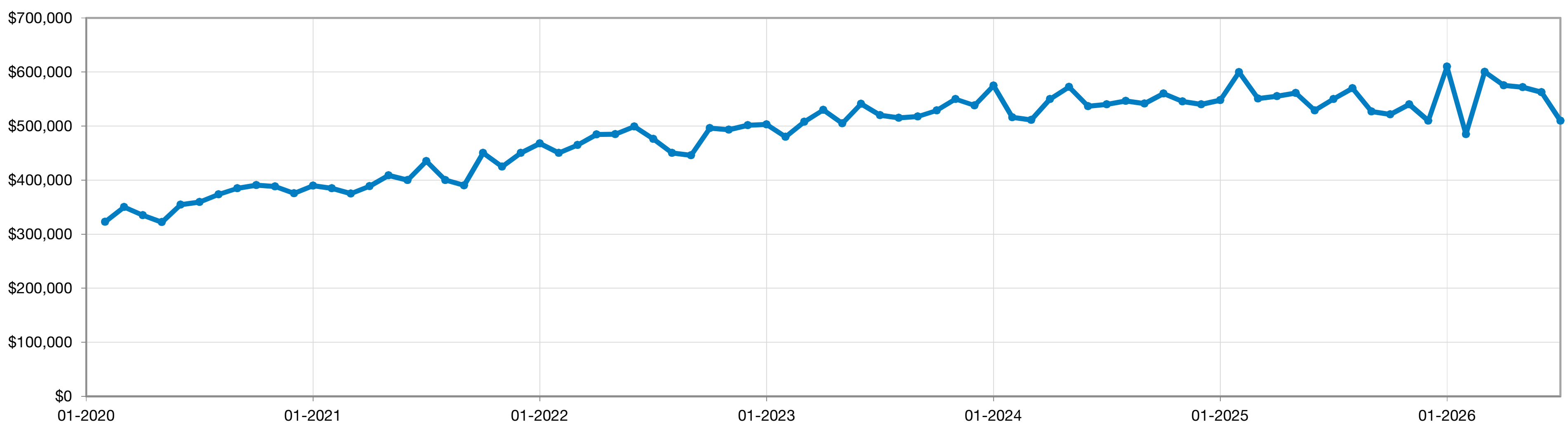
Year to Date



Median Sales Price		Prior Year	Percent Change
August 2025	$570,000	$546,386	+4.3%
September 2025	$527,083	$541,500	-2.7%
October 2025	$521,500	$560,000	-6.9%
November 2025	$540,000	$545,195	-1.0%
December 2025	$510,000	$540,000	-5.6%
January 2026	$609,900	$547,900	+11.3%
February 2026	$485,000	$599,725	-19.1%
March 2026	$599,990	$550,665	+9.0%
April 2026	$575,000	$555,000	+3.6%
May 2026	$572,000	$560,900	+2.0%
June 2026	$562,500	$529,000	+6.3%
July 2026	**$510,000**	**$550,000**	**-7.3%**
12-Month Med*	$548,580	$550,000	-0.3%

* Median Sales Price of all properties from August 2025 through July 2026. This is not the median of the individual figures above.

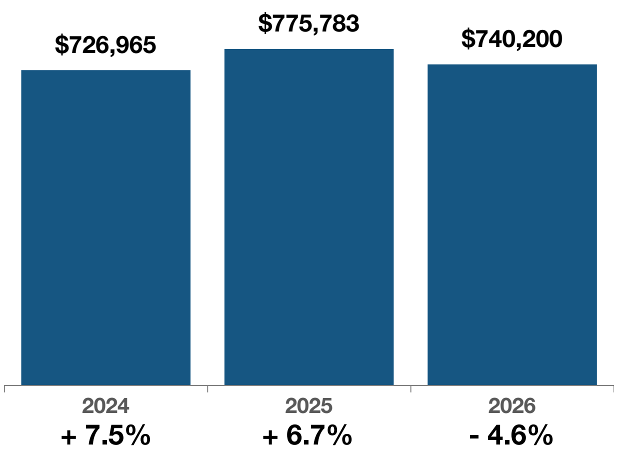
Historical Median Sales Price by Month



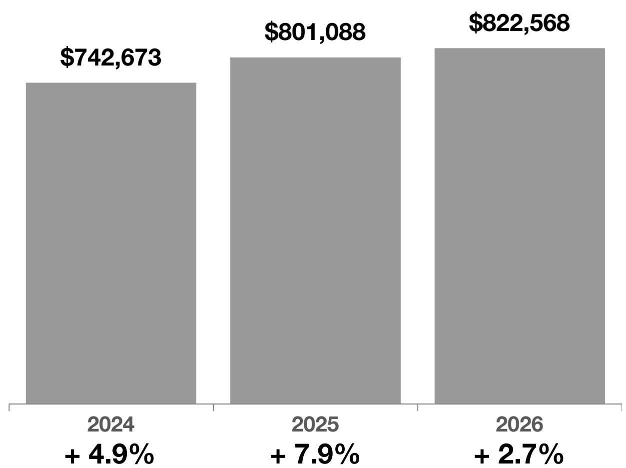
Average Sales Price

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

July



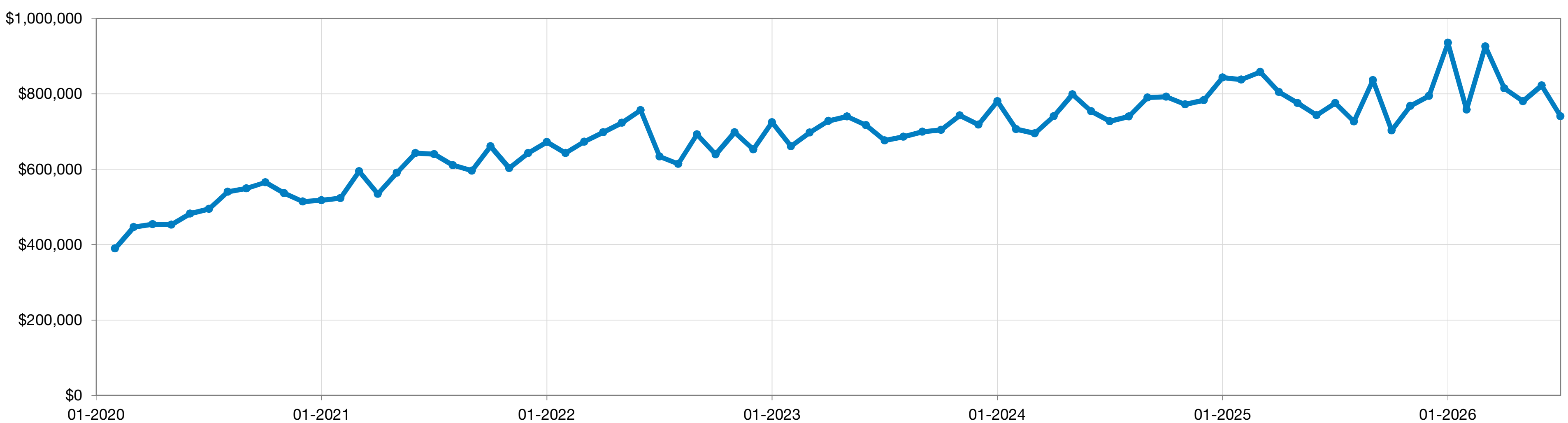
Year to Date



Avg. Sales Price		Prior Year	Percent Change
August 2025	$726,522	$739,625	-1.8%
September 2025	$836,522	$790,472	+5.8%
October 2025	$702,780	$791,894	-11.3%
November 2025	$768,034	$772,131	-0.5%
December 2025	$794,399	$783,354	+1.4%
January 2026	$935,301	$843,279	+10.9%
February 2026	$758,228	$837,616	-9.5%
March 2026	$925,759	$857,753	+7.9%
April 2026	$814,791	$805,061	+1.2%
May 2026	$780,470	$775,612	+0.6%
June 2026	$822,197	$743,553	+10.6%
July 2026	**$740,200**	**$775,783**	**-4.6%**
12-Month Avg*	$800,434	$793,011	+0.9%

* Avg. Sales Price of all properties from August 2025 through July 2026. This is not the average of the individual figures above.

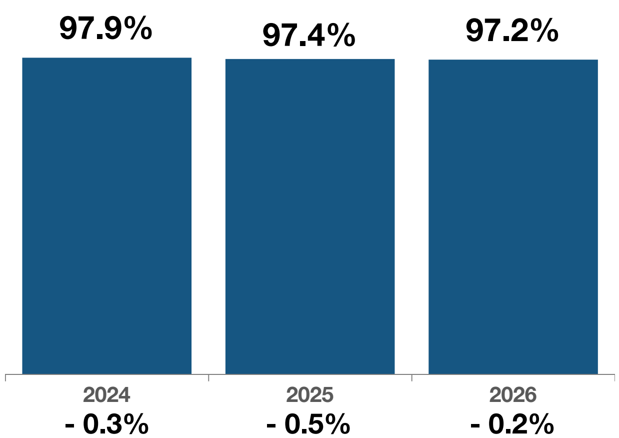
Historical Average Sales Price by Month



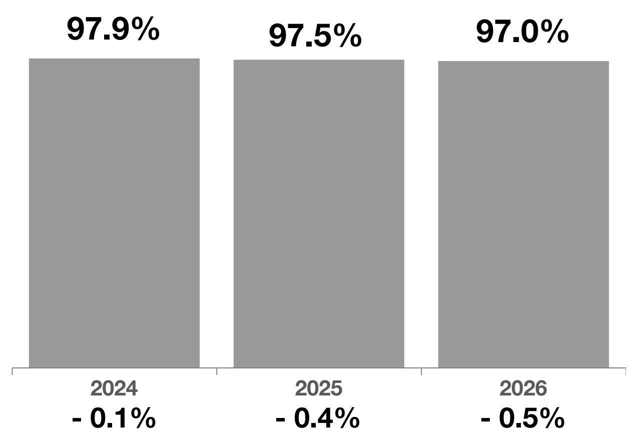
Percent of List Price Received

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.

July



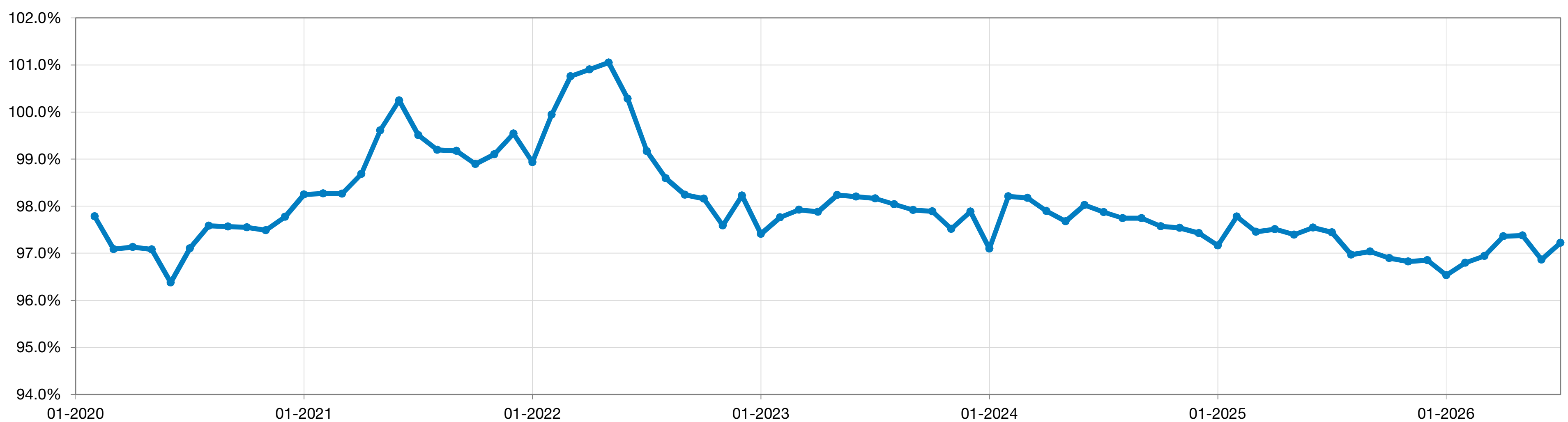
Year to Date



Pct. of List Price Received		Prior Year	Percent Change
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	96.9%	97.4%	-0.5%
January 2026	96.5%	97.2%	-0.7%
February 2026	96.8%	97.8%	-1.0%
March 2026	96.9%	97.5%	-0.6%
April 2026	97.4%	97.5%	-0.1%
May 2026	97.4%	97.4%	0.0%
June 2026	96.9%	97.5%	-0.6%
July 2026	**97.2%**	**97.4%**	**-0.2%**
12-Month Avg*	97.0%	97.5%	-0.5%

* Average Pct. of List Price Received for all properties from August 2025 through July 2026. This is not the average of the individual figures above.

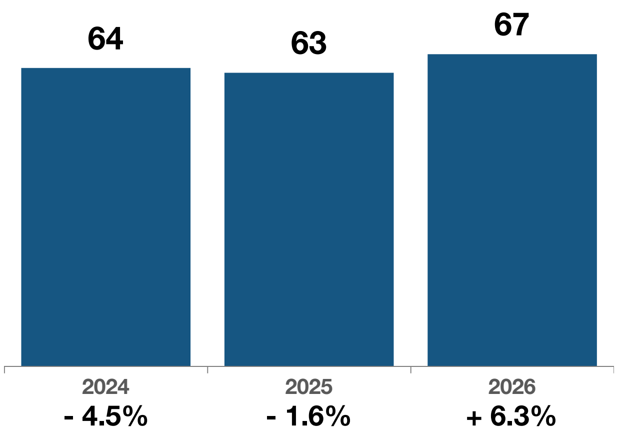
Historical Percent of List Price Received by Month



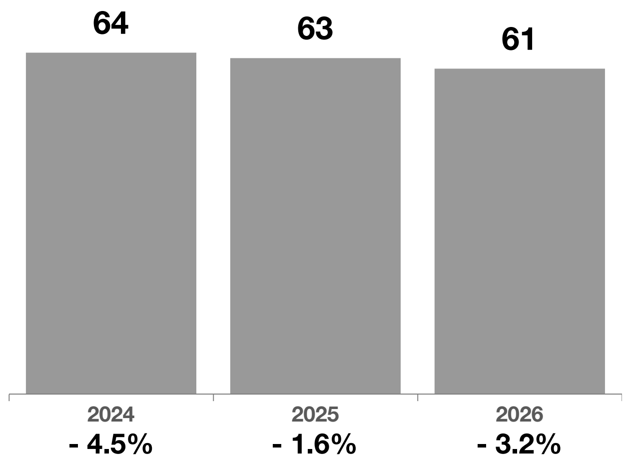
Housing Affordability Index

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.

July

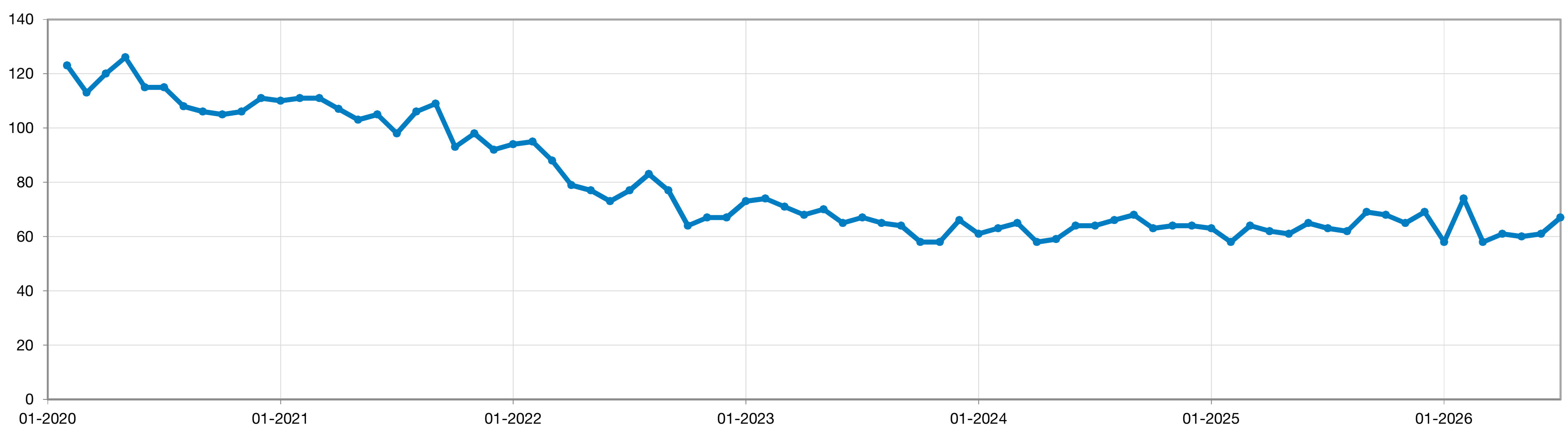


Year to Date



Affordability Index		Prior Year	Percent Change
August 2025	62	66	-6.1%
September 2025	69	68	+1.5%
October 2025	68	63	+7.9%
November 2025	65	64	+1.6%
December 2025	69	64	+7.8%
January 2026	58	63	-7.9%
February 2026	74	58	+27.6%
March 2026	58	64	-9.4%
April 2026	61	62	-1.6%
May 2026	60	61	-1.6%
June 2026	61	65	-6.2%
July 2026	**67**	**63**	**+6.3%**
12-Month Avg	64	63	+1.4%

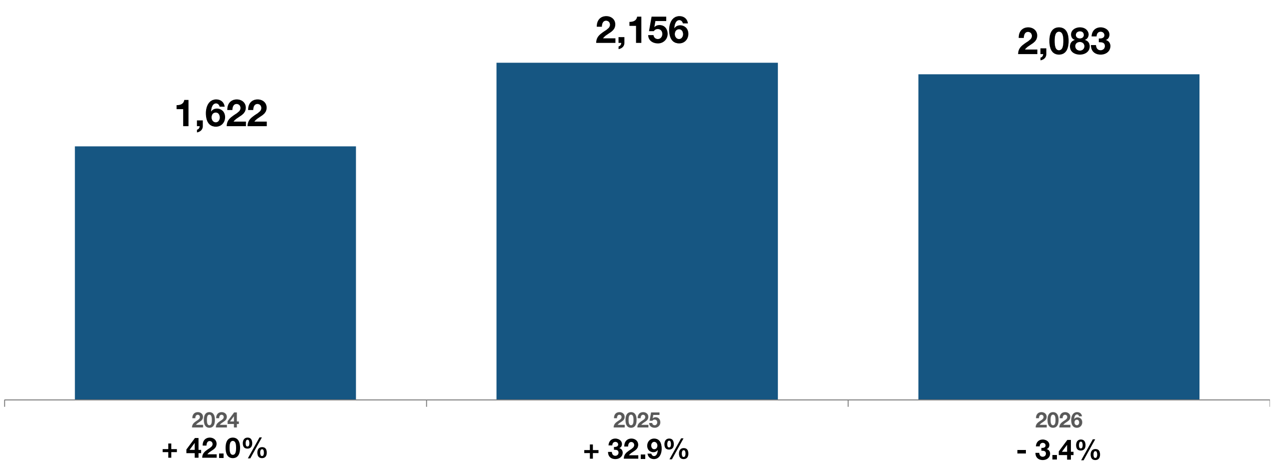
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

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

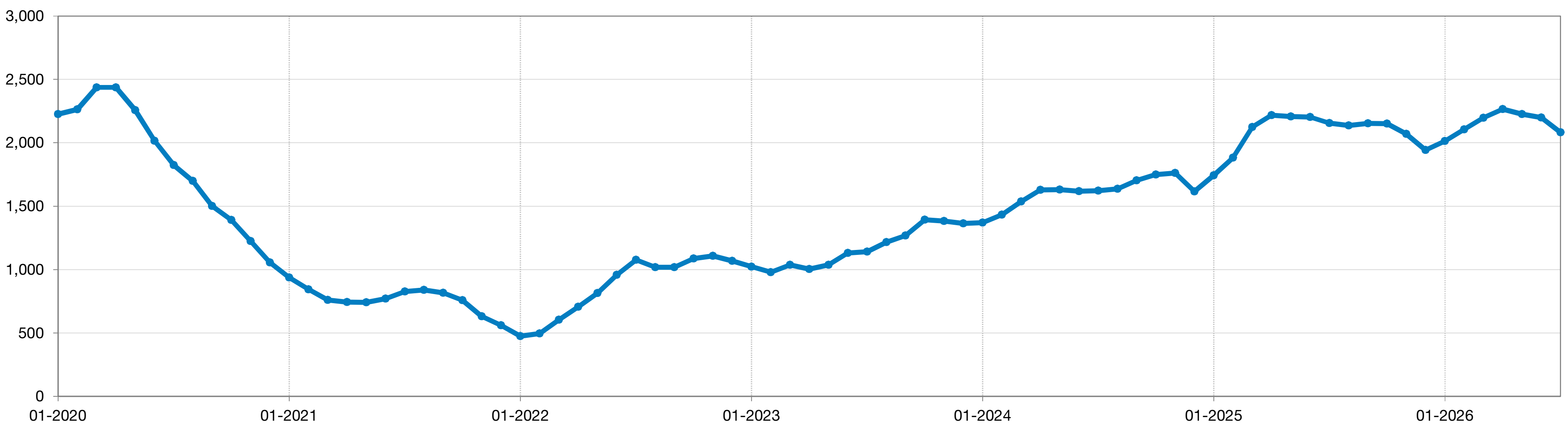
July



Homes for Sale		Prior Year	Percent Change
August 2025	2,137	1,637	+30.5%
September 2025	2,154	1,704	+26.4%
October 2025	2,151	1,749	+23.0%
November 2025	2,070	1,761	+17.5%
December 2025	1,942	1,615	+20.2%
January 2026	2,014	1,742	+15.6%
February 2026	2,106	1,882	+11.9%
March 2026	2,197	2,124	+3.4%
April 2026	2,266	2,218	+2.2%
May 2026	2,225	2,207	+0.8%
June 2026	2,198	2,202	-0.2%
July 2026	**2,083**	**2,156**	**-3.4%**
12-Month Avg*	2,129	1,916	+11.1%

* Homes for Sale for all properties from August 2025 through July 2026. This is not the average of the individual figures above.

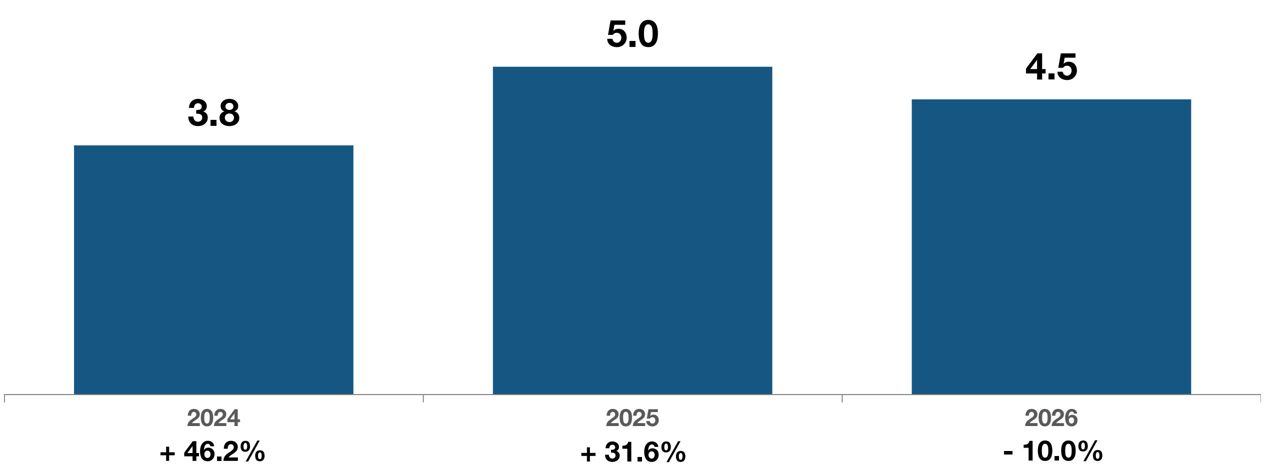
Historical Inventory of Homes for Sale by Month



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.

July



Months Supply		Prior Year	Percent Change
August 2025	4.9	3.9	+25.6%
September 2025	4.8	4.1	+17.1%
October 2025	4.8	4.2	+14.3%
November 2025	4.6	4.2	+9.5%
December 2025	4.4	3.8	+15.8%
January 2026	4.5	4.1	+9.8%
February 2026	4.7	4.5	+4.4%
March 2026	4.9	5.0	-2.0%
April 2026	5.0	5.3	-5.7%
May 2026	4.9	5.2	-5.8%
June 2026	4.8	5.2	-7.7%
July 2026	**4.5**	**5.0**	**-10.0%**
12-Month Avg*	4.7	4.5	+4.4%

* Months Supply for all properties from August 2025 through July 2026. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month