Monthly Indicators

October 2026

U.S. existing-home sales rose 1.5 percent from August and fell 2.2 percent from a year earlier in September, to a seasonally adjusted annual rate of 3.99 million, according to the National Association of REALTORS®. Sales increased in the South and the West, held steady in the Midwest, and declined in the Northeast. Compared with a year earlier, sales declined in all four regions. August and September were the two slowest months for home sales this year, NAR Chief Economist Lawrence Yun said.

New Listings were down 9.0 percent to 558. Pending Sales decreased 16.1 percent to 370. Inventory shrank 4.6 percent to 2,052 units.

Median Sales Price was up 12.2 percent to $585,000. Days on Market decreased 1.6 percent to 124 days. Months Supply of Inventory was down 4.2 percent to 4.6 months.

Heading into October, 1.60 million homes were listed for sale, up 1.9 percent from the previous month and 4.6 percent from a year earlier, according to NAR. Unsold inventory was a 4.8-month supply, unchanged from August and up from a 4.5-month supply a year earlier. The median existing-home sales price was $417,500, up 1.3 percent from $412,300 a year earlier. That marked the 39th consecutive month of year-over-year price gains.

Quick Facts

+ 0.2%	+ 12.2%	- 4.2%
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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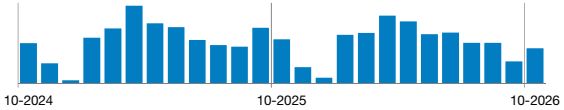
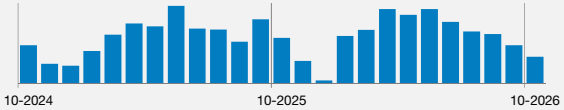
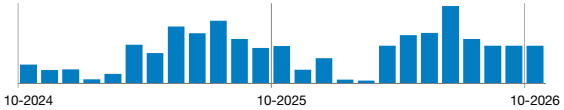
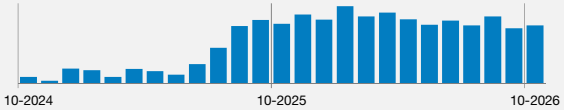
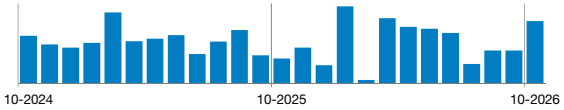
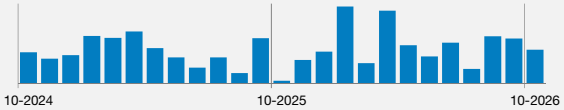
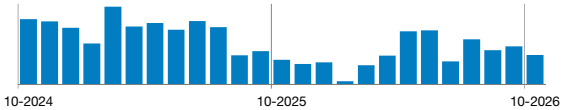
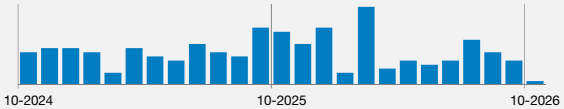
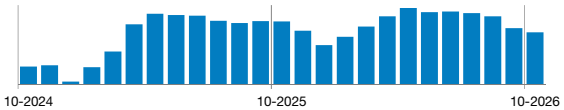
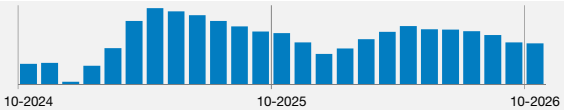
Market Overview

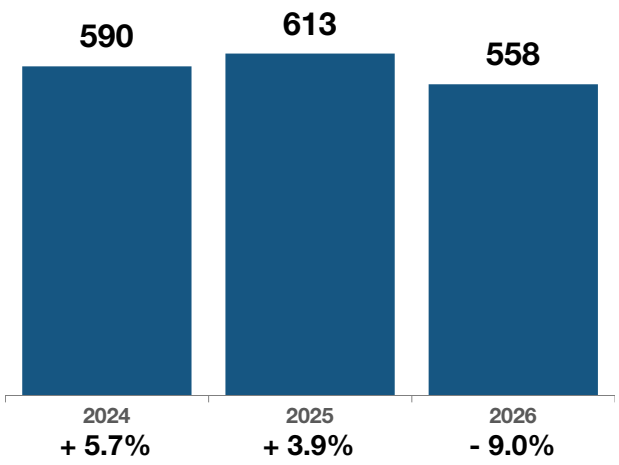
Key market metrics for the current month and year-to-date figures.

Key Metrics	Historical Sparkbars	10-2025	10-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		613	**558**	- 9.0%	6,587	**6,300**	- 4.4%
Pending Sales		441	**370**	- 16.1%	4,707	**4,743**	+ 0.8%
Closed Sales		468	**469**	+ 0.2%	4,670	**4,696**	+ 0.6%
Days on Market		126	**124**	- 1.6%	90	**130**	+ 44.4%
Median Sales Price		$521,500	**$585,000**	+ 12.2%	$549,999	**$555,500**	+ 1.0%
Average Sales Price		$702,780	**$800,188**	+ 13.9%	$786,867	**$822,857**	+ 4.6%
Pct. of List Price Received		96.9%	**97.0%**	+ 0.1%	97.3%	**97.1%**	- 0.2%
Housing Affordability Index		68	**56**	- 17.6%	64	**59**	- 7.8%
Inventory of Homes for Sale		2,151	**2,052**	- 4.6%	--	**--**	--
Months Supply of Inventory		4.8	**4.6**	- 4.2%	--	**--**	--

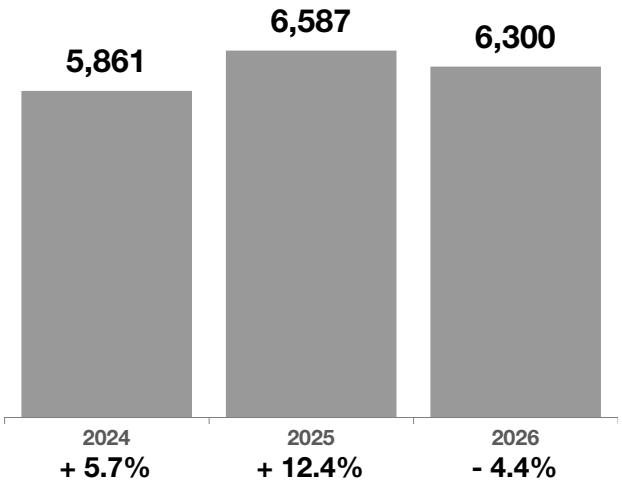
New Listings

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

October

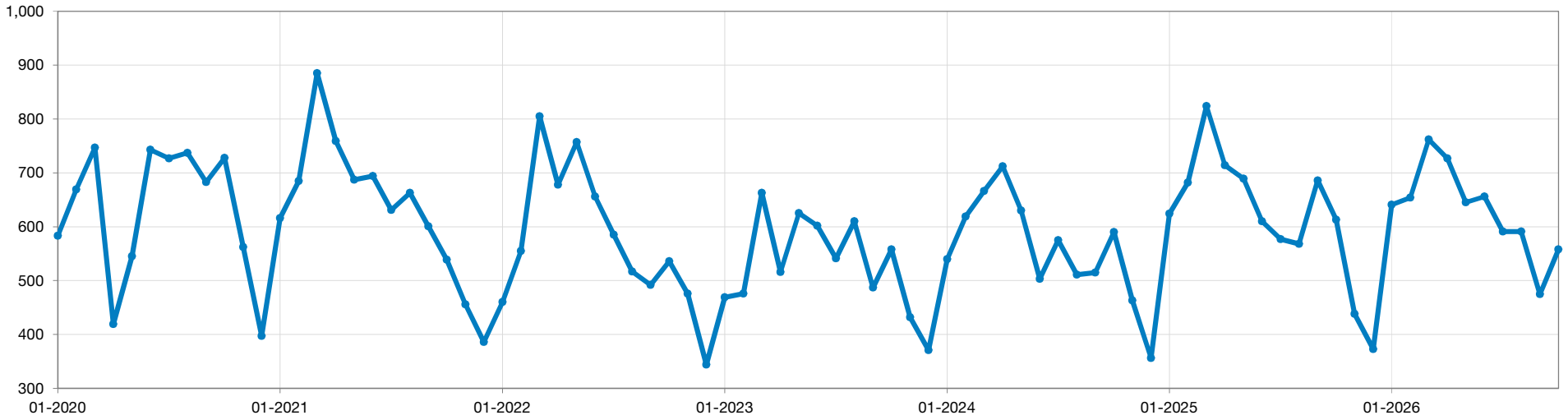


Year to Date



New Listings		Prior Year	Percent Change
November 2025	438	463	-5.4%
December 2025	373	356	+4.8%
January 2026	641	624	+2.7%
February 2026	654	682	-4.1%
March 2026	762	824	-7.5%
April 2026	727	714	+1.8%
May 2026	645	689	-6.4%
June 2026	656	610	+7.5%
July 2026	591	577	+2.4%
August 2026	591	568	+4.0%
September 2026	475	686	-30.8%
October 2026	**558**	**613**	**-9.0%**
12-Month Avg	593	617	-4.0%

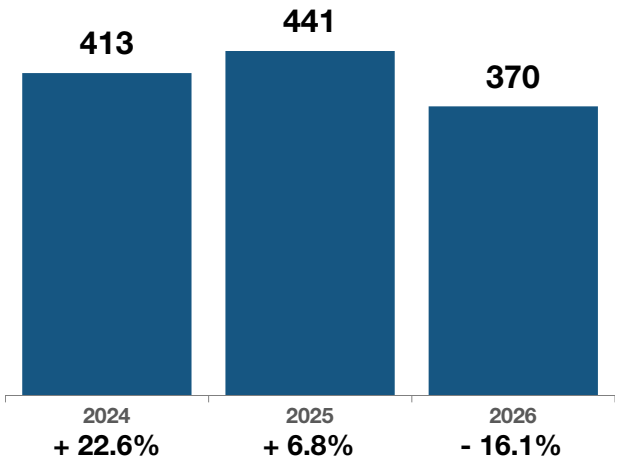
Historical New Listings by Month



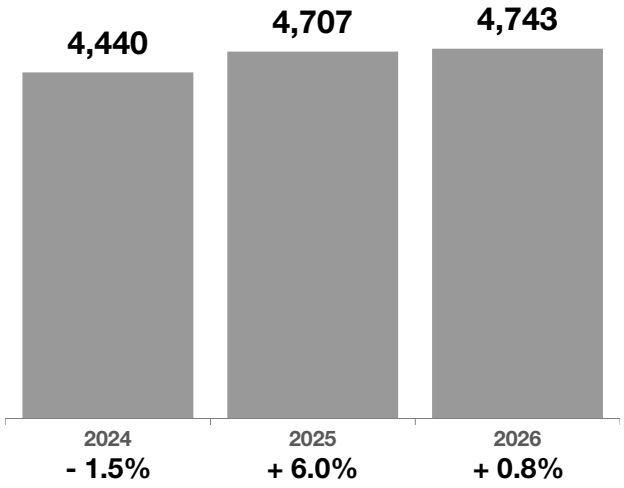
Pending Sales

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

October

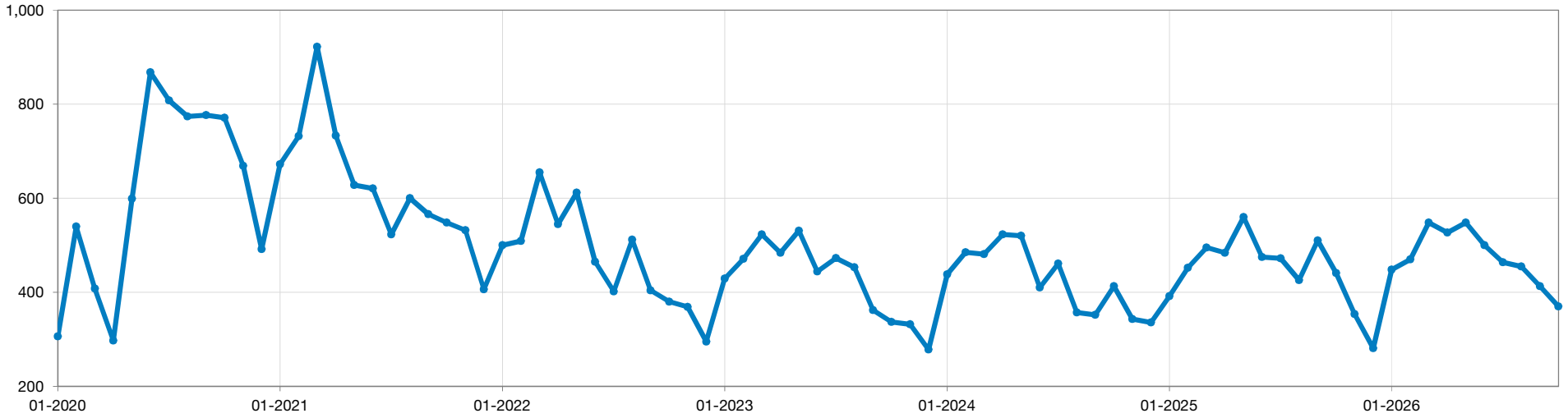


Year to Date



Pending Sales		Prior Year	Percent Change
November 2025	354	343	+3.2%
December 2025	281	336	-16.4%
January 2026	448	392	+14.3%
February 2026	470	452	+4.0%
March 2026	548	495	+10.7%
April 2026	527	484	+8.9%
May 2026	548	560	-2.1%
June 2026	500	475	+5.3%
July 2026	464	472	-1.7%
August 2026	455	426	+6.8%
September 2026	413	510	-19.0%
October 2026	**370**	**441**	**-16.1%**
12-Month Avg	448	449	-0.1%

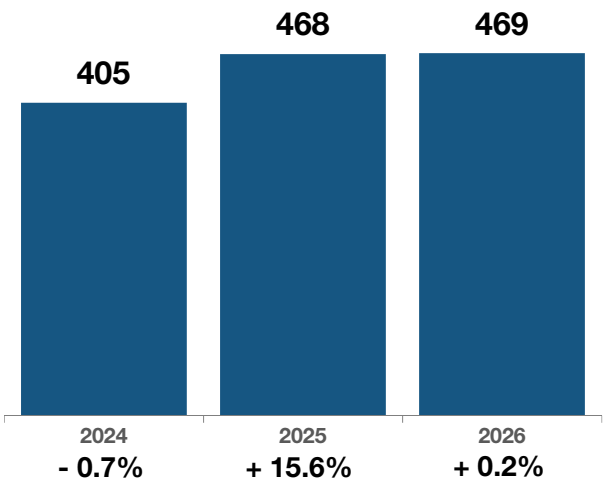
Historical Pending Sales by Month



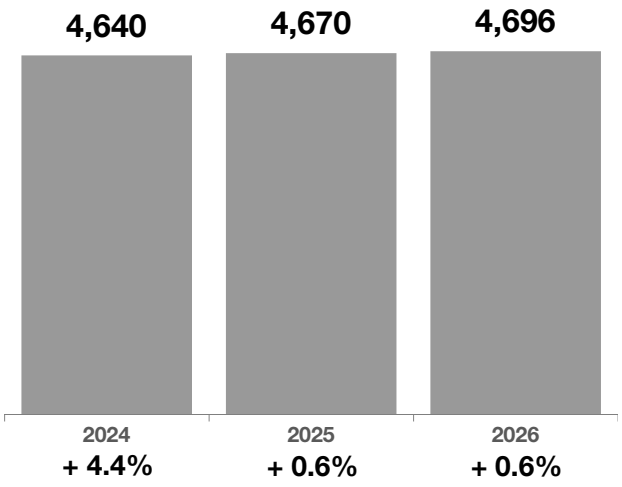
Closed Sales

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

October

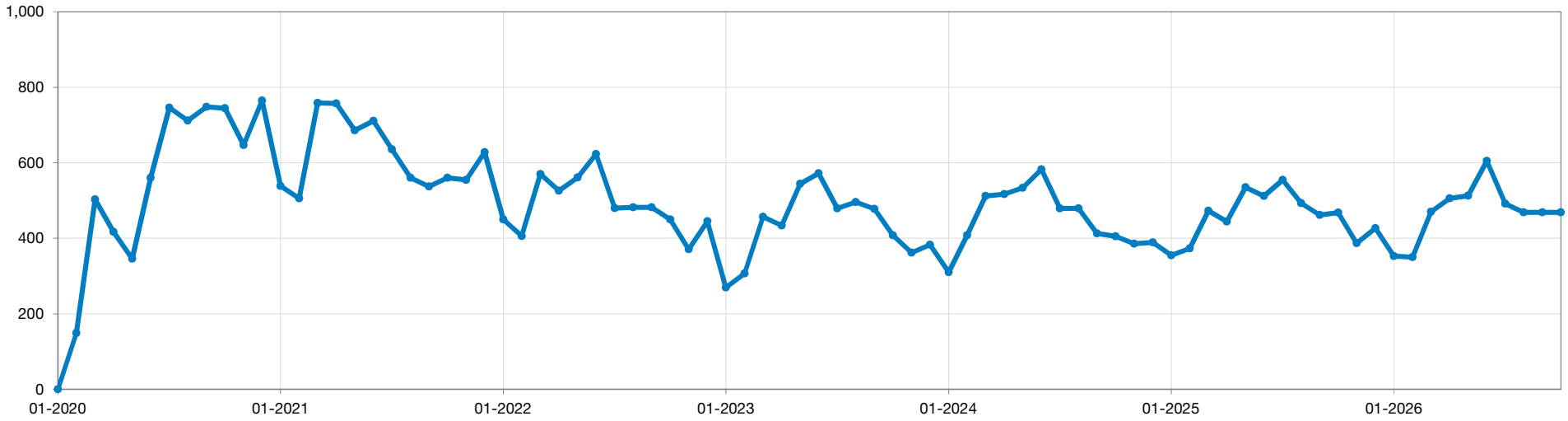


Year to Date



Closed Sales		Prior Year	Percent Change
November 2025	387	386	+0.3%
December 2025	427	389	+9.8%
January 2026	353	355	-0.6%
February 2026	350	373	-6.2%
March 2026	470	473	-0.6%
April 2026	506	444	+14.0%
May 2026	513	535	-4.1%
June 2026	605	512	+18.2%
July 2026	492	555	-11.4%
August 2026	469	493	-4.9%
September 2026	469	462	+1.5%
October 2026	**469**	**468**	**+0.2%**
12-Month Avg	459	454	+1.2%

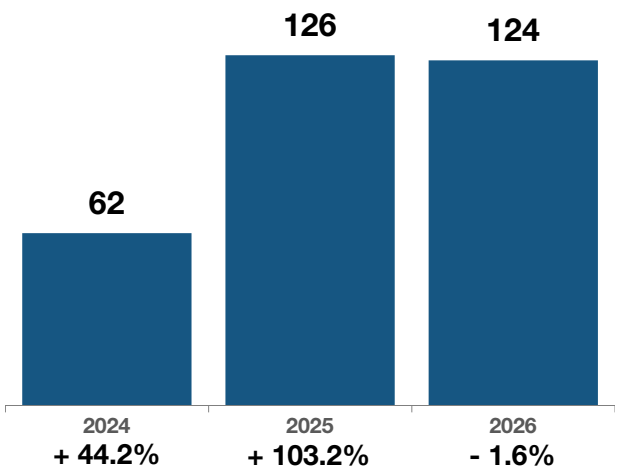
Historical Closed Sales by Month



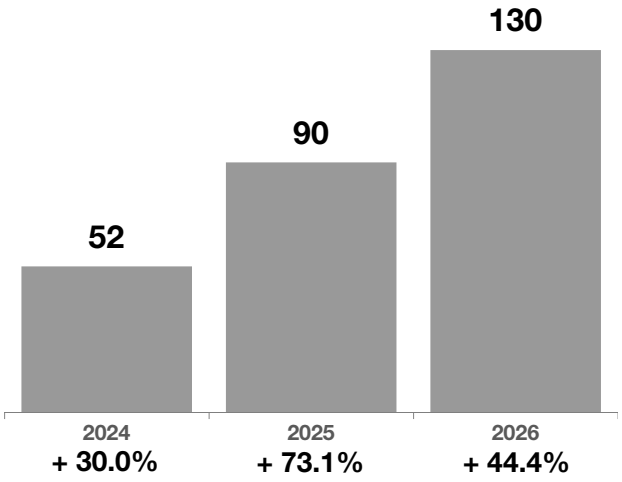
Days on Market Until Sale

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

October



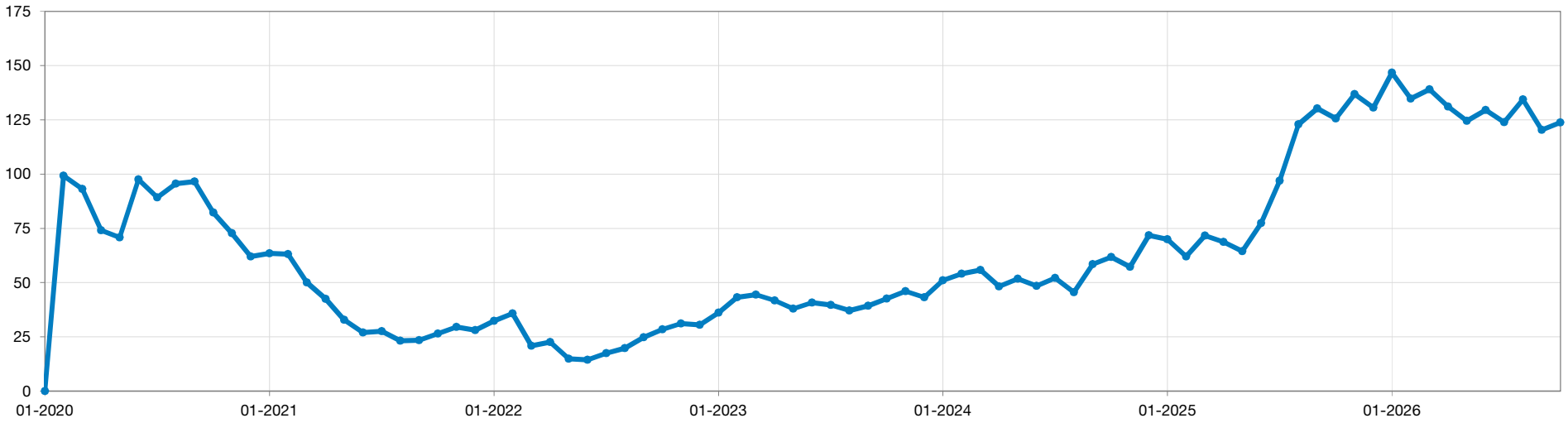
Year to Date



Days on Market		Prior Year	Percent Change
November 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	129	77	+67.5%
July 2026	124	97	+27.8%
August 2026	134	123	+8.9%
September 2026	120	130	-7.7%
October 2026	**124**	**126**	**-1.6%**
12-Month Avg*	131	86	+52.3%

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

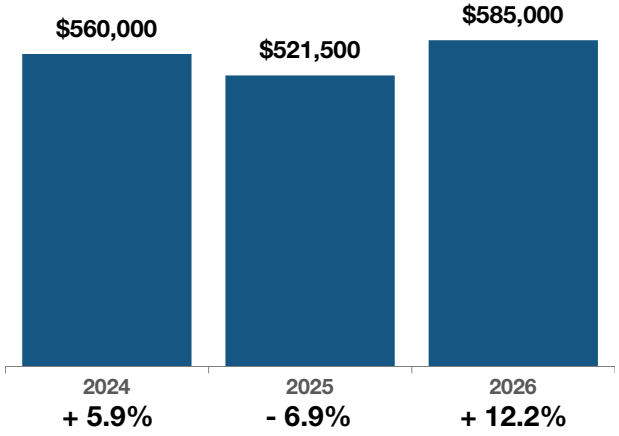
Historical Days on Market Until Sale by Month



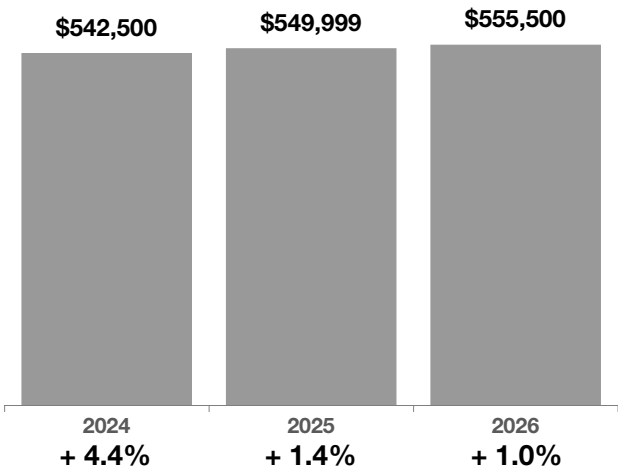
Median Sales Price

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

October



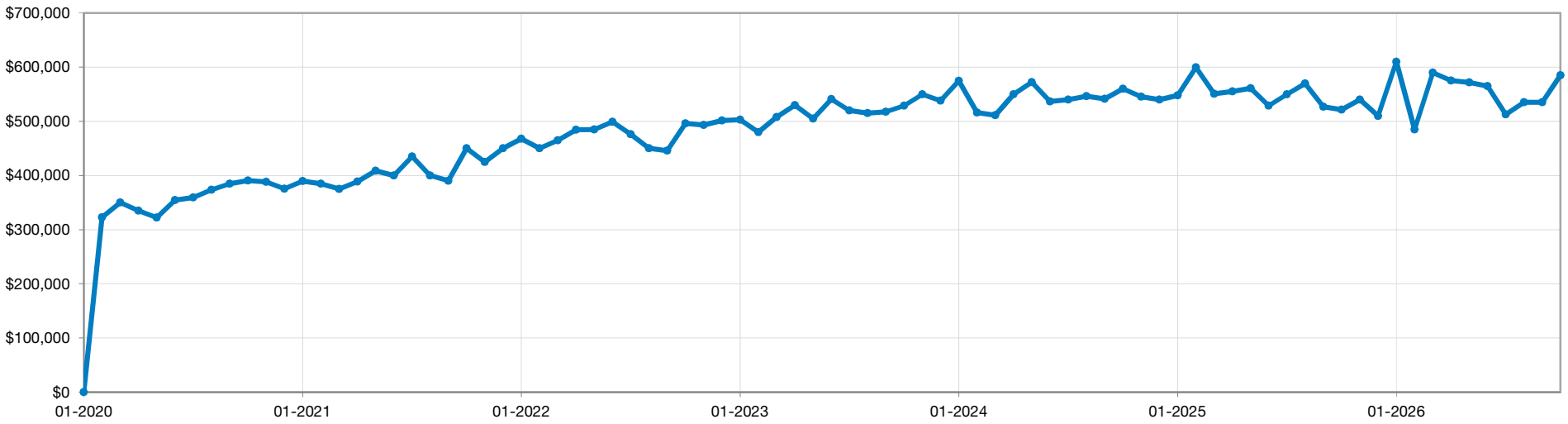
Year to Date



Median Sales Price		Prior Year	Percent Change
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	$590,033	$550,665	+7.1%
April 2026	$575,000	$555,000	+3.6%
May 2026	$572,000	$560,900	+2.0%
June 2026	$565,000	$529,000	+6.8%
July 2026	$512,500	$550,000	-6.8%
August 2026	$535,000	$570,000	-6.1%
September 2026	$535,000	$527,083	+1.5%
October 2026	**$585,000**	**$521,500**	**+12.2%**
12-Month Med*	$550,000	$547,940	+0.4%

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

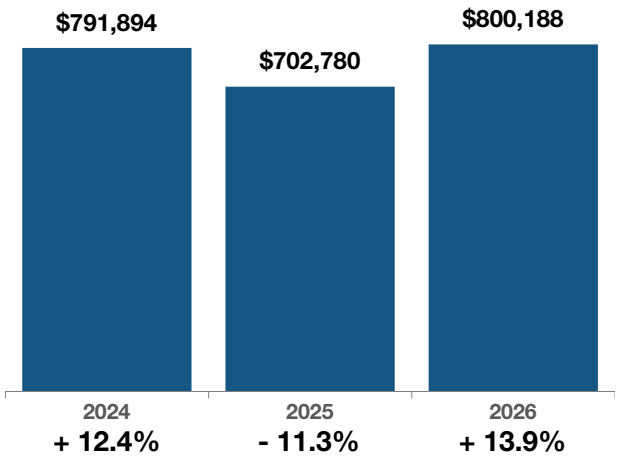
Historical Median Sales Price by Month



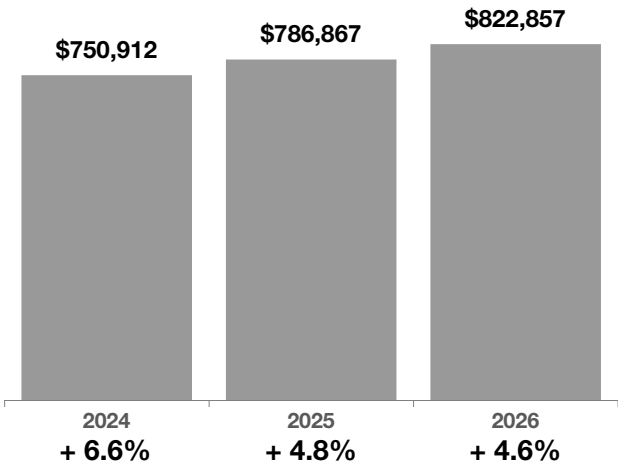
Average Sales Price

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

October



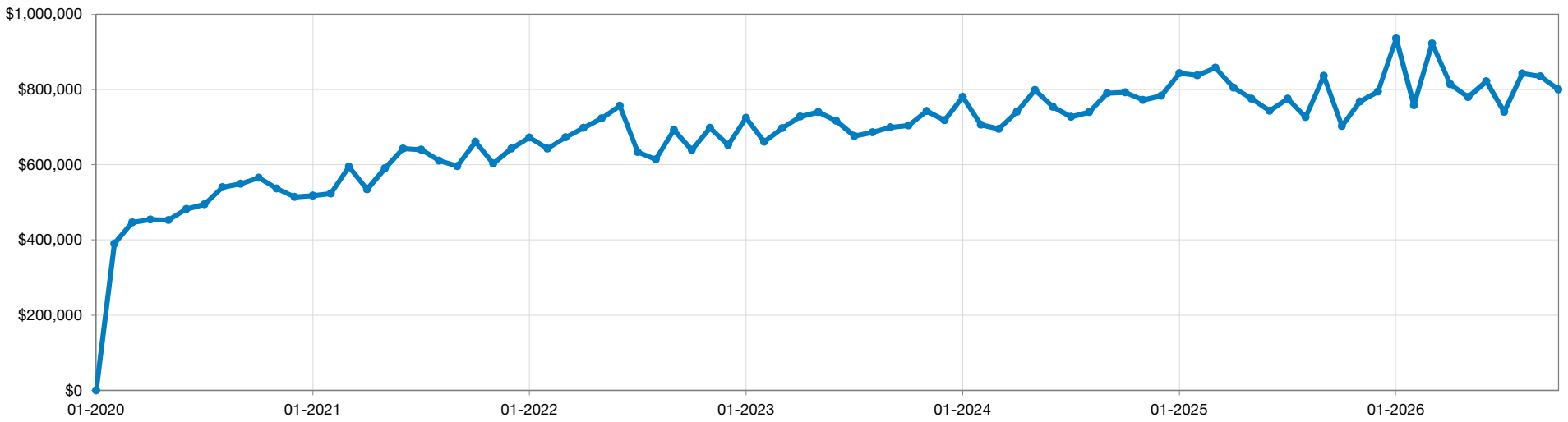
Year to Date



Avg. Sales Price		Prior Year	Percent Change
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	$758,040	$837,616	-9.5%
March 2026	$922,144	$857,753	+7.5%
April 2026	$813,887	$805,061	+1.1%
May 2026	$779,578	$775,612	+0.5%
June 2026	$821,830	$743,553	+10.5%
July 2026	$740,445	$775,783	-4.6%
August 2026	$842,621	$726,522	+16.0%
September 2026	$834,792	$836,522	-0.2%
October 2026	**$800,188**	**$702,780**	**+13.9%**
12-Month Avg*	$817,605	$788,330	+3.7%

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

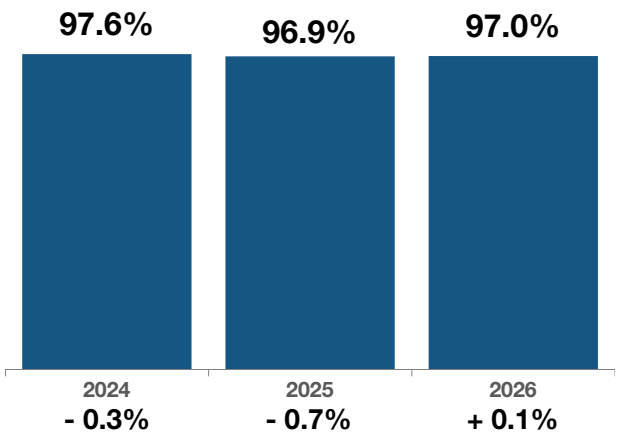
Historical Average Sales Price by Month



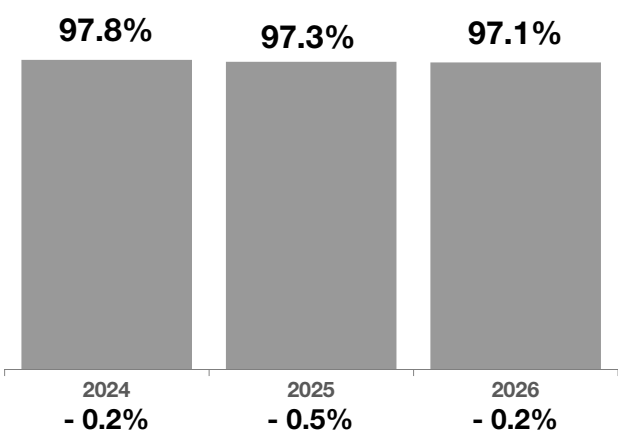
Percent of List Price Received

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.

October



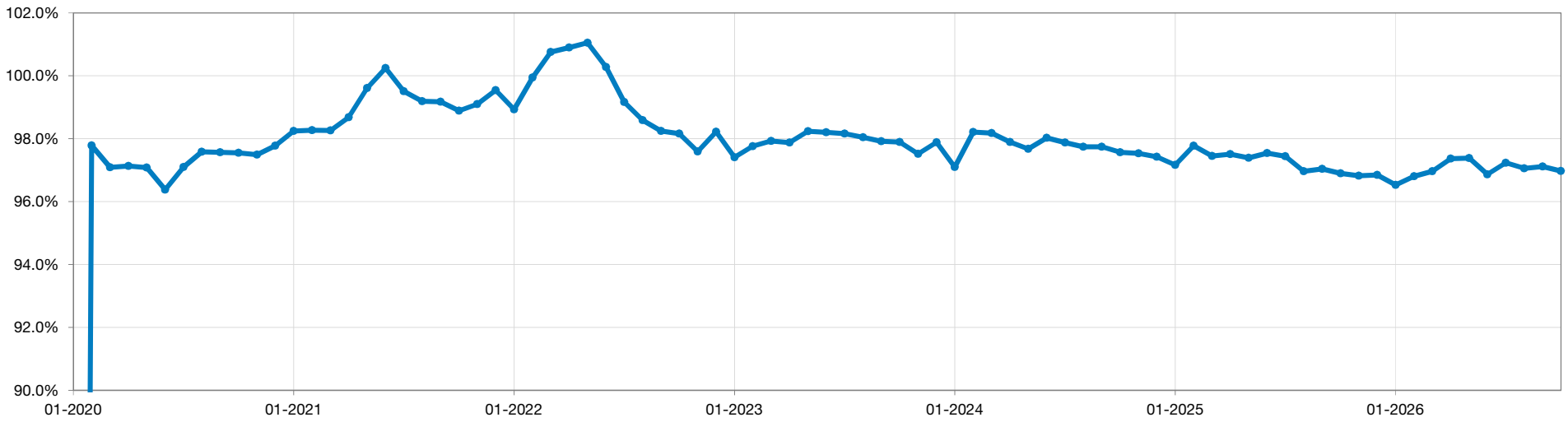
Year to Date



Pct. of List Price Received		Prior Year	Percent Change
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	97.0%	97.5%	-0.5%
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%
August 2026	97.1%	97.0%	+0.1%
September 2026	97.1%	97.0%	+0.1%
October 2026	**97.0%**	**96.9%**	**+0.1%**
12-Month Avg*	97.0%	97.3%	-0.3%

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

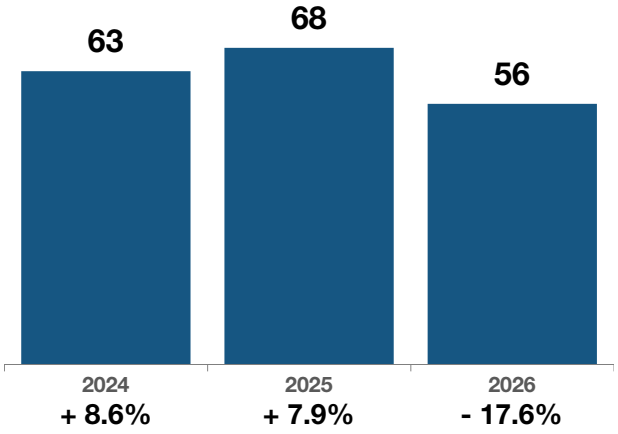
Historical Percent of List Price Received by Month



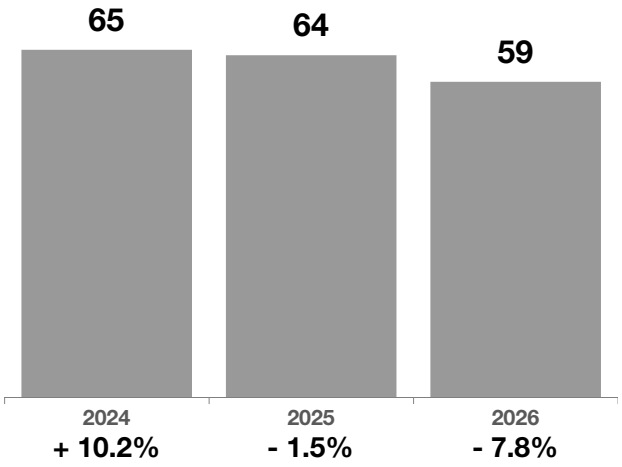
Housing Affordability Index

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.

October

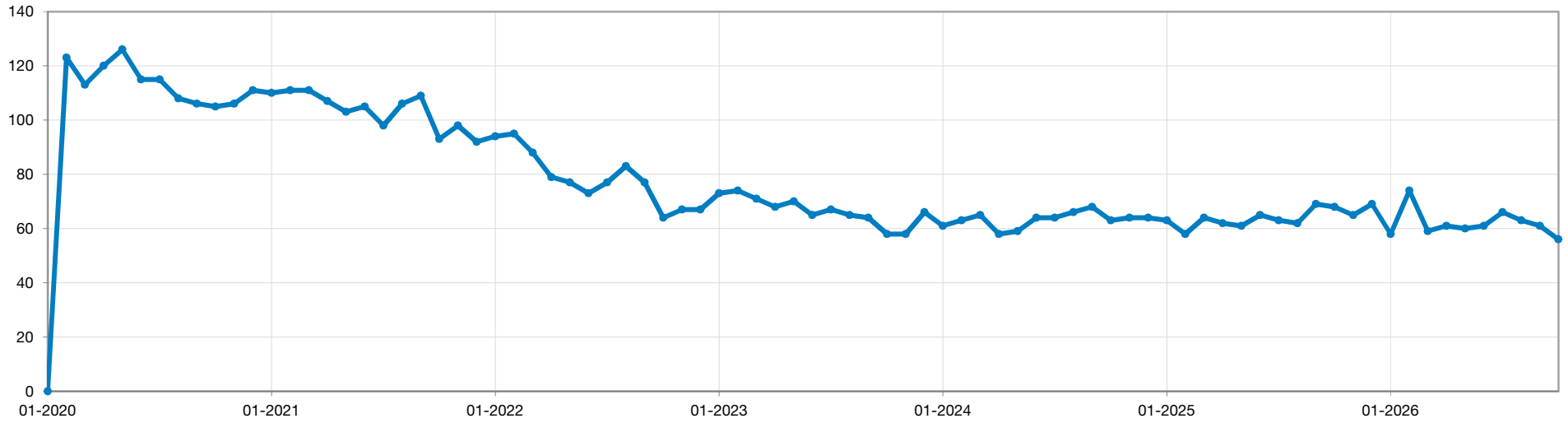


Year to Date



Affordability Index		Prior Year	Percent Change
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	59	64	-7.8%
April 2026	61	62	-1.6%
May 2026	60	61	-1.6%
June 2026	61	65	-6.2%
July 2026	66	63	+4.8%
August 2026	63	62	+1.6%
September 2026	61	69	-11.6%
October 2026	**56**	**68**	**-17.6%**
12-Month Avg	63	64	-1.3%

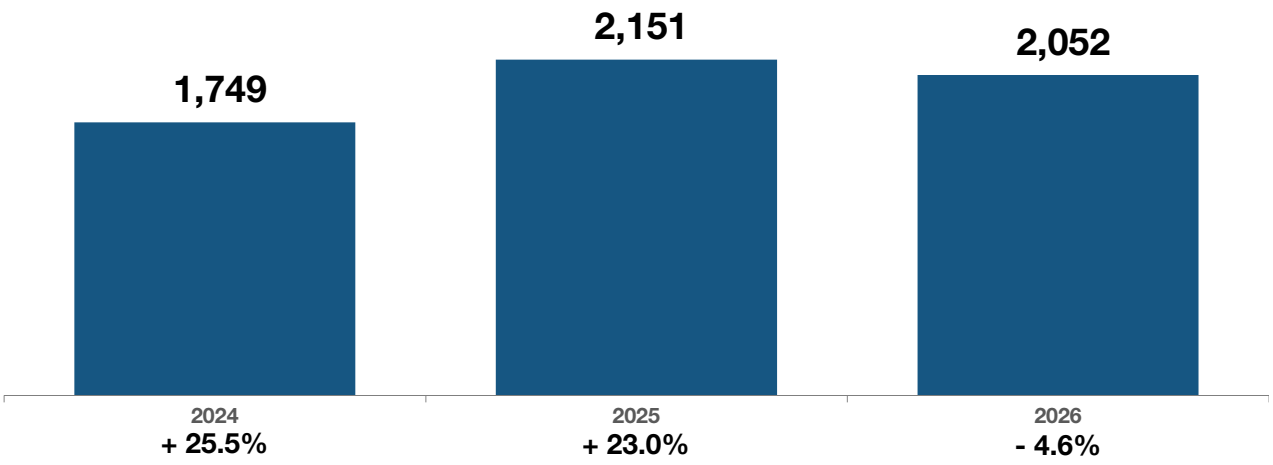
Historical Housing Affordability Index by Month



Inventory of Homes for Sale

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

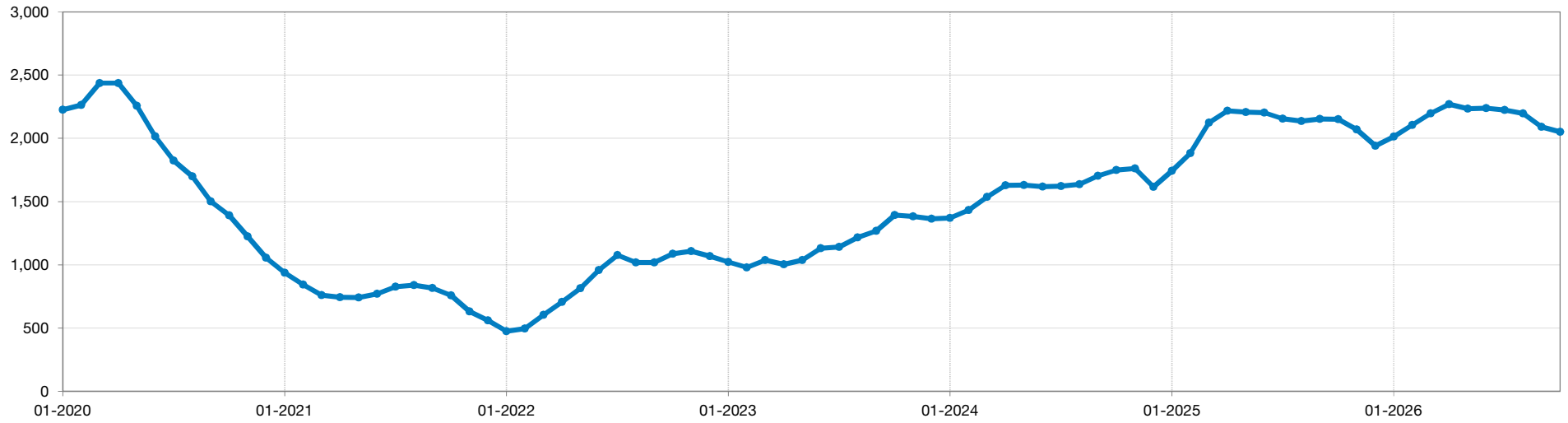
October



Homes for Sale		Prior Year	Percent Change
November 2025	2,069	1,761	+17.5%
December 2025	1,941	1,615	+20.2%
January 2026	2,014	1,742	+15.6%
February 2026	2,106	1,882	+11.9%
March 2026	2,196	2,124	+3.4%
April 2026	2,269	2,218	+2.3%
May 2026	2,234	2,207	+1.2%
June 2026	2,239	2,202	+1.7%
July 2026	2,223	2,156	+3.1%
August 2026	2,196	2,137	+2.8%
September 2026	2,090	2,154	-3.0%
October 2026	**2,052**	**2,151**	**-4.6%**
12-Month Avg*	2,136	2,029	+5.3%

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

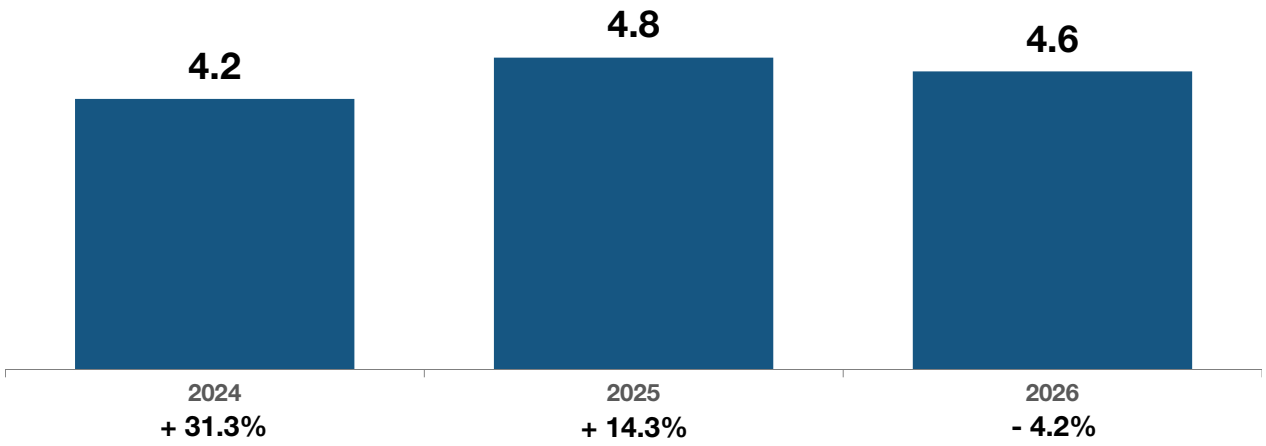
Historical Inventory of Homes for Sale by Month



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.

October



Months Supply		Prior Year	Percent Change
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	4.8	5.0	-4.0%
April 2026	4.9	5.3	-7.5%
May 2026	4.9	5.2	-5.8%
June 2026	4.9	5.2	-5.8%
July 2026	4.8	5.0	-4.0%
August 2026	4.8	4.9	-2.0%
September 2026	4.6	4.8	-4.2%
October 2026	**4.6**	**4.8**	**-4.2%**
12-Month Avg*	4.7	4.7	0.0%

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

Historical Months Supply of Inventory by Month

