

Monthly Indicators



August 2025

U.S. existing-home sales rose 2.0% month-over-month and 0.8% year-over-year to a seasonally adjusted annual rate of 4.01 million units, according to the National Association of REALTORS® (NAR). Economists polled by Reuters had forecast a rate of 3.92 million units. Regionally, sales increased on a monthly basis in the West, South, and Northeast, but declined in the Midwest.

New Listings were up 9.6 percent to 560. Pending Sales increased 25.2 percent to 447. Inventory grew 25.6 percent to 2,018 units.

Prices moved higher as Median Sales Price was up 5.2 percent to \$575,000. Days on Market increased 157.8 percent to 116 days. Months Supply of Inventory was up 17.9 percent to 4.6 months.

Nationally, 1.55 million units were listed for sale heading into August, up 0.6% from the previous month and 15.7% higher than the same time last year, representing a 4.6-month supply at the current sales pace, according to NAR. Inventory is now at its highest level since May 2020, a shift that has helped slow price growth in many markets. As a result, the national median existing-home sales price edged up just 0.2% year-over-year to \$422,400.

Quick Facts

| | | |
|------------------------------------|--|-------------------------------------|
| + 0.2% | + 5.2% | + 17.9% |
| 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.



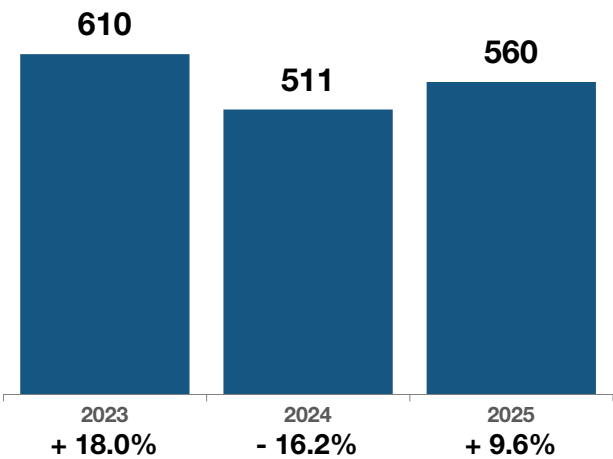
| Key Metrics | Historical Sparkbars | 08-2024 | 08-2025 | Percent Change | YTD 2024 | YTD 2025 | Percent Change |
|-----------------------------|----------------------|-----------|-----------|----------------|-----------|-----------|----------------|
| New Listings | | 511 | 560 | + 9.6% | 4,754 | 5,272 | + 10.9% |
| Pending Sales | | 357 | 447 | + 25.2% | 3,677 | 3,780 | + 2.8% |
| Closed Sales | | 479 | 480 | + 0.2% | 3,822 | 3,715 | - 2.8% |
| Days on Market | | 45 | 116 | + 157.8% | 51 | 79 | + 54.9% |
| Median Sales Price | | \$546,386 | \$575,000 | + 5.2% | \$542,000 | \$558,450 | + 3.0% |
| Average Sales Price | | \$739,625 | \$725,698 | - 1.9% | \$742,292 | \$792,402 | + 6.8% |
| Pct. of List Price Received | | 97.7% | 96.9% | - 0.8% | 97.9% | 97.4% | - 0.5% |
| Housing Affordability Index | | 62 | 58 | - 6.5% | 62 | 59 | - 4.8% |
| Inventory of Homes for Sale | | 1,607 | 2,018 | + 25.6% | -- | -- | -- |
| Months Supply of Inventory | | 3.9 | 4.6 | + 17.9% | -- | -- | -- |

New Listings

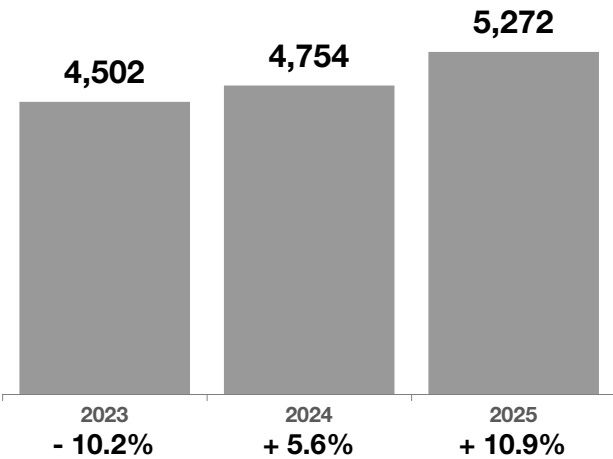
A count of the properties that have been newly listed on the market in a given month.



August

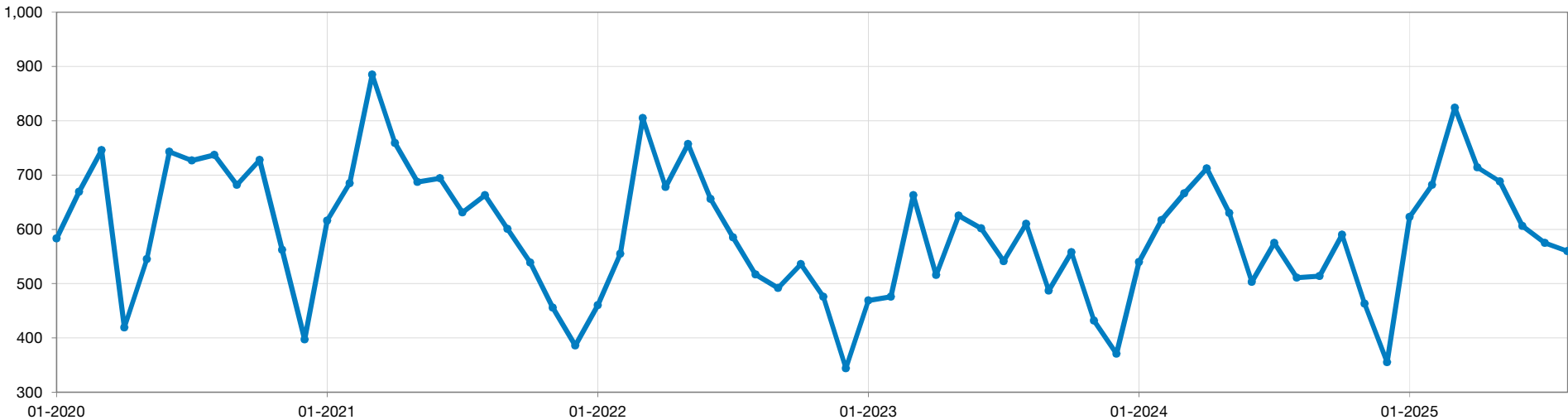


Year to Date



| New Listings | | Prior Year | Percent Change |
|----------------|-----|------------|----------------|
| September 2024 | 514 | 487 | +5.5% |
| October 2024 | 590 | 558 | +5.7% |
| November 2024 | 463 | 432 | +7.2% |
| December 2024 | 355 | 371 | -4.3% |
| January 2025 | 623 | 540 | +15.4% |
| February 2025 | 682 | 617 | +10.5% |
| March 2025 | 824 | 666 | +23.7% |
| April 2025 | 714 | 712 | +0.3% |
| May 2025 | 688 | 630 | +9.2% |
| June 2025 | 606 | 503 | +20.5% |
| July 2025 | 575 | 575 | 0.0% |
| August 2025 | 560 | 511 | +9.6% |
| 12-Month Avg | 600 | 550 | +9.0% |

Historical New Listings by Month

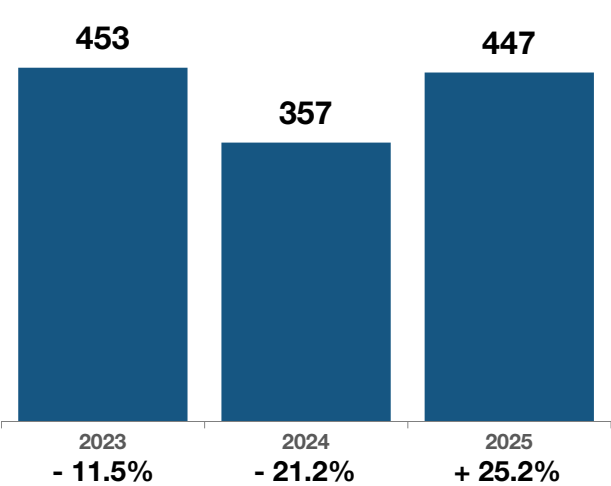


Pending Sales

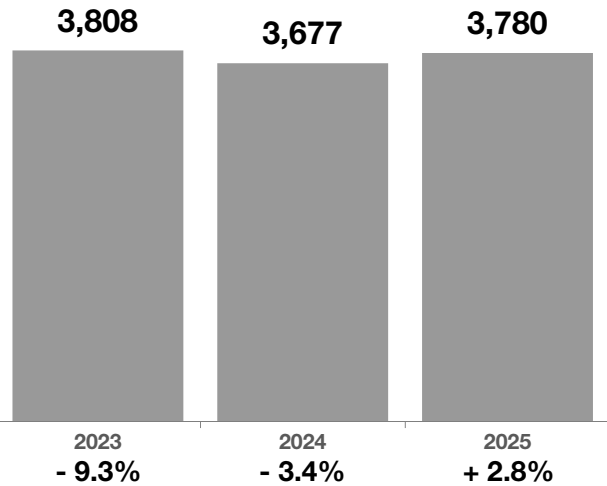
A count of the properties on which offers have been accepted in a given month.



August

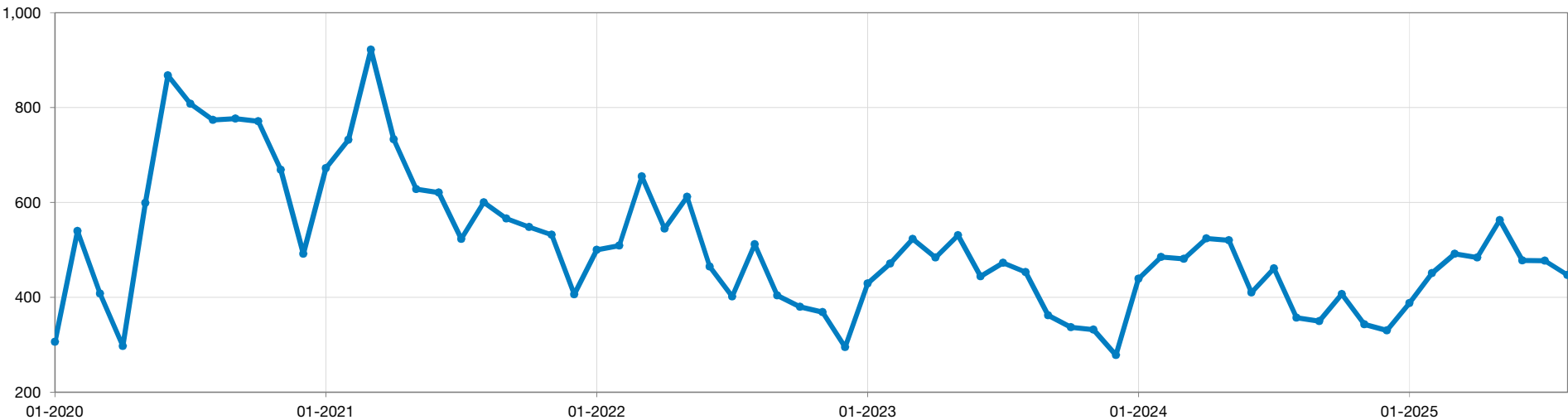


Year to Date



| Pending Sales | | Prior Year | Percent Change |
|----------------|-----|------------|----------------|
| September 2024 | 350 | 362 | -3.3% |
| October 2024 | 407 | 337 | +20.8% |
| November 2024 | 343 | 332 | +3.3% |
| December 2024 | 330 | 278 | +18.7% |
| January 2025 | 388 | 439 | -11.6% |
| February 2025 | 451 | 485 | -7.0% |
| March 2025 | 492 | 481 | +2.3% |
| April 2025 | 484 | 524 | -7.6% |
| May 2025 | 563 | 520 | +8.3% |
| June 2025 | 478 | 410 | +16.6% |
| July 2025 | 477 | 461 | +3.5% |
| August 2025 | 447 | 357 | +25.2% |
| 12-Month Avg | 434 | 416 | +4.5% |

Historical Pending Sales by Month

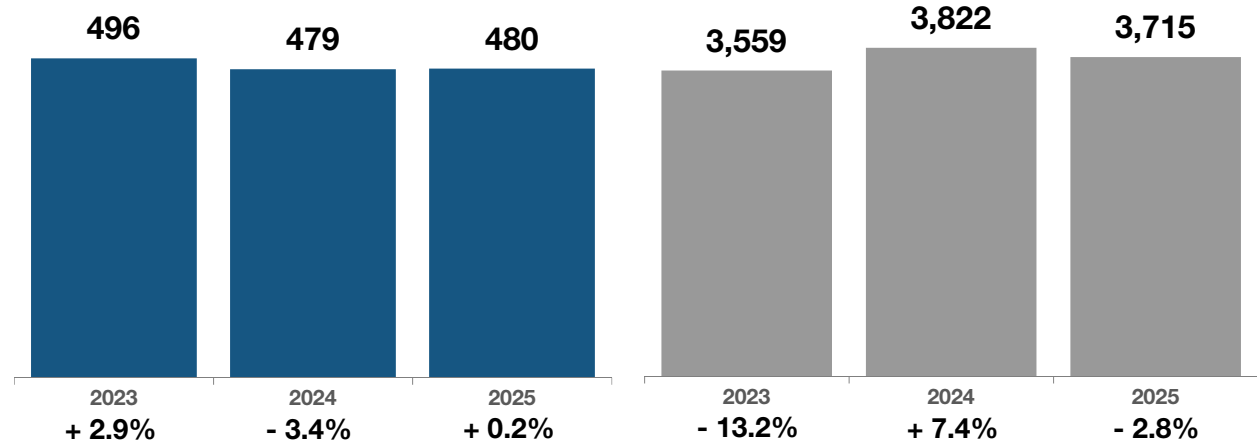


Closed Sales

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

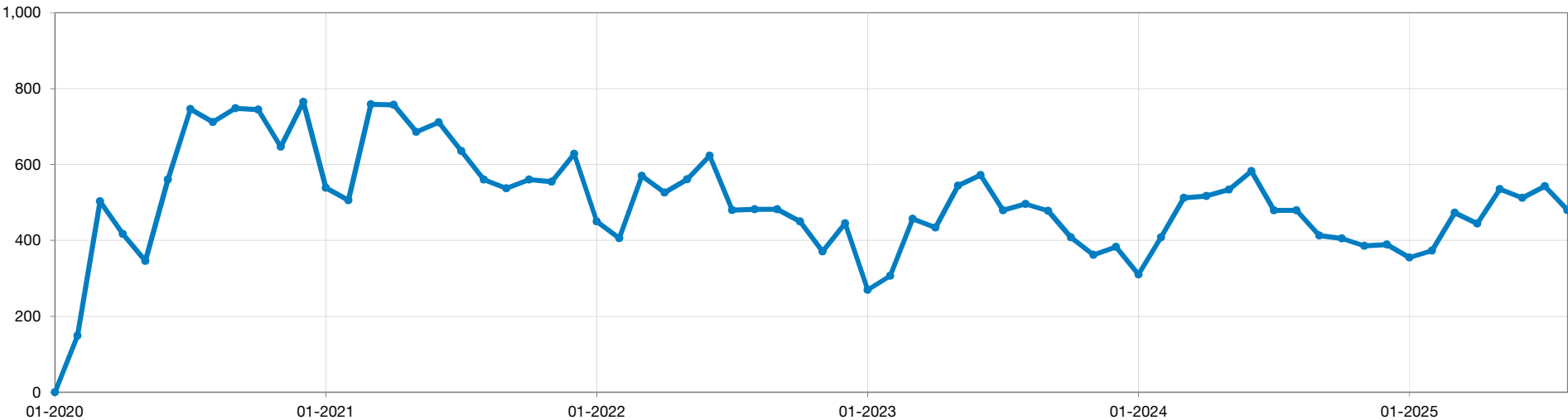


August



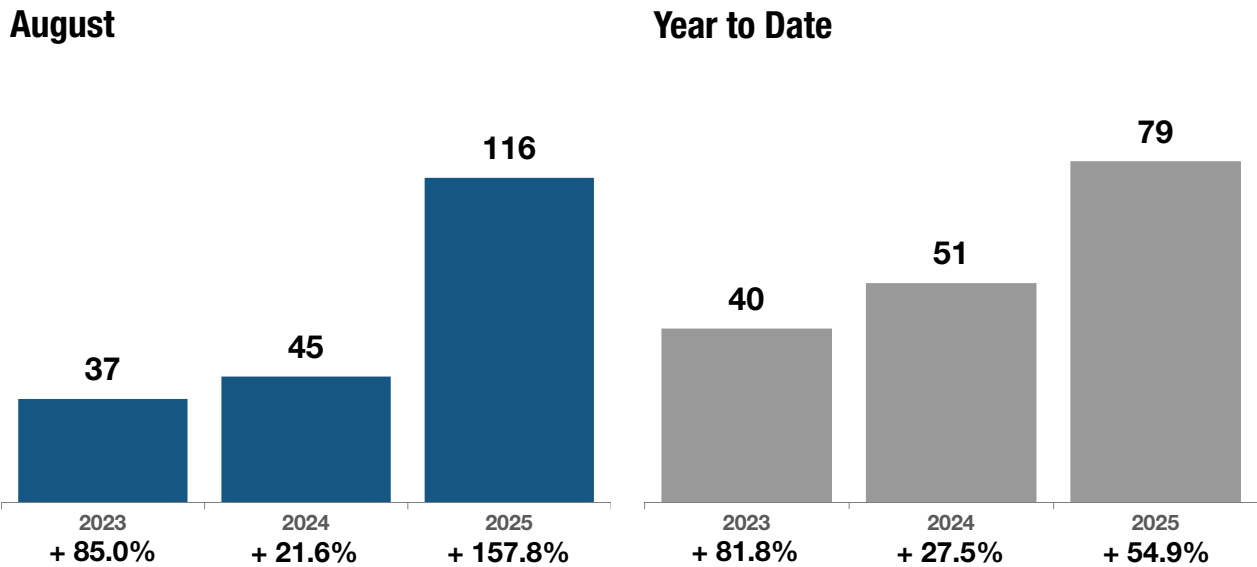
| Closed Sales | | Prior Year | Percent Change |
|----------------|-----|------------|----------------|
| September 2024 | 413 | 478 | -13.6% |
| October 2024 | 405 | 408 | -0.7% |
| November 2024 | 386 | 362 | +6.6% |
| December 2024 | 389 | 383 | +1.6% |
| January 2025 | 355 | 310 | +14.5% |
| February 2025 | 373 | 408 | -8.6% |
| March 2025 | 473 | 512 | -7.6% |
| April 2025 | 444 | 517 | -14.1% |
| May 2025 | 535 | 534 | +0.2% |
| June 2025 | 512 | 583 | -12.2% |
| July 2025 | 543 | 479 | +13.4% |
| August 2025 | 480 | 479 | +0.2% |
| 12-Month Avg | 442 | 454 | -2.7% |

Historical Closed Sales by Month



Days on Market Until Sale

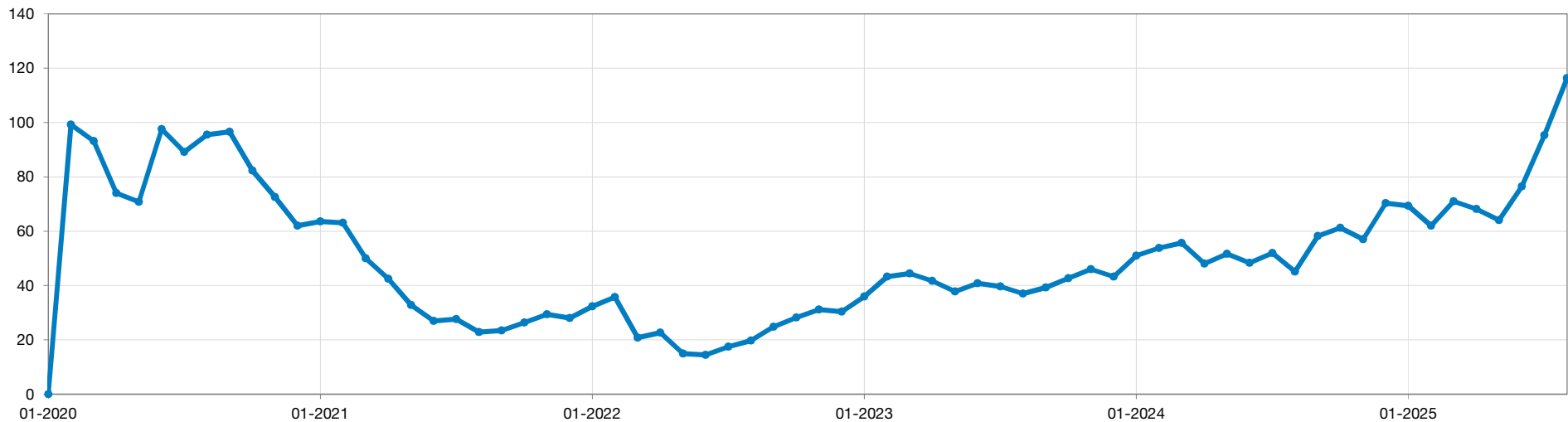
Average number of days between when a property is listed and when an offer is accepted in a given month.



| Days on Market | | Prior Year | Percent Change |
|----------------|-----|------------|----------------|
| September 2024 | 58 | 39 | +48.7% |
| October 2024 | 61 | 43 | +41.9% |
| November 2024 | 57 | 46 | +23.9% |
| December 2024 | 70 | 43 | +62.8% |
| January 2025 | 69 | 51 | +35.3% |
| February 2025 | 62 | 54 | +14.8% |
| March 2025 | 71 | 56 | +26.8% |
| April 2025 | 68 | 48 | +41.7% |
| May 2025 | 64 | 52 | +23.1% |
| June 2025 | 76 | 48 | +58.3% |
| July 2025 | 95 | 52 | +82.7% |
| August 2025 | 116 | 45 | +157.8% |
| 12-Month Avg* | 74 | 48 | +54.2% |

* Average Days on Market of all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month

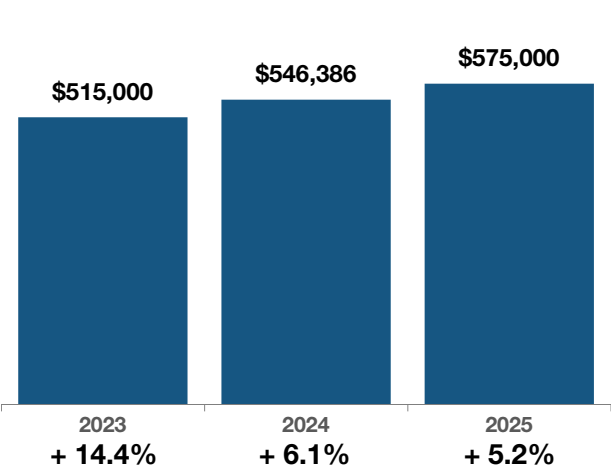


Median Sales Price

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



August



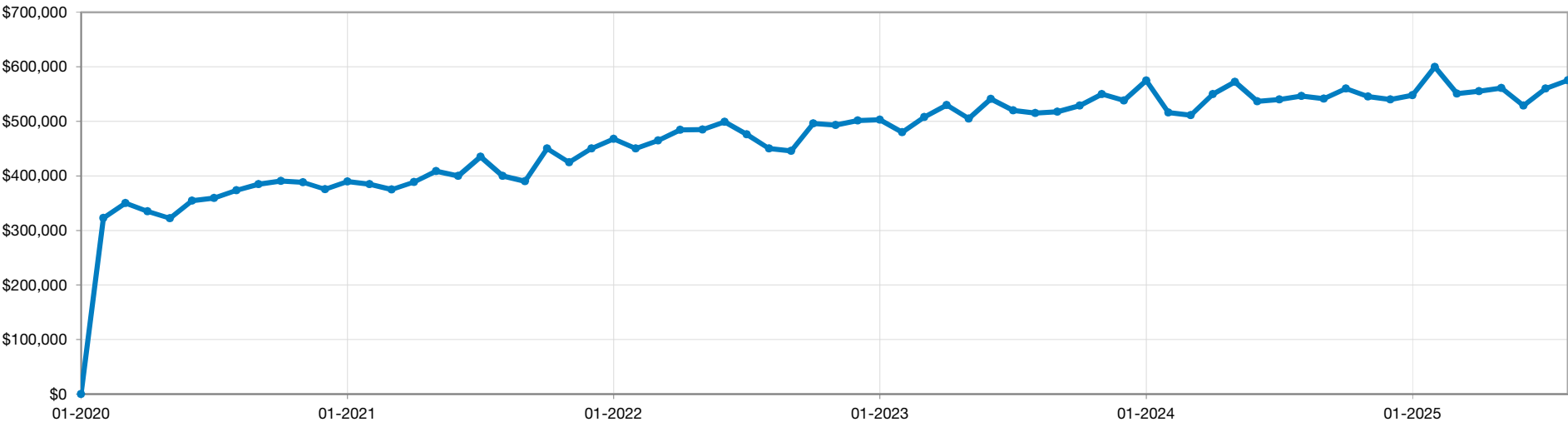
Year to Date



| Median Sales Price | | Prior Year | Percent Change |
|--------------------|-----------|------------|----------------|
| September 2024 | \$541,500 | \$517,500 | +4.6% |
| October 2024 | \$560,000 | \$529,000 | +5.9% |
| November 2024 | \$545,195 | \$550,000 | -0.9% |
| December 2024 | \$540,000 | \$538,000 | +0.4% |
| 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 | \$559,900 | \$540,000 | +3.7% |
| August 2025 | \$575,000 | \$546,386 | +5.2% |
| 12-Month Med* | \$550,000 | \$540,000 | +1.9% |

* Median Sales Price of all properties from September 2024 through August 2025. This is not the median of the individual figures above.

Historical Median Sales Price by Month

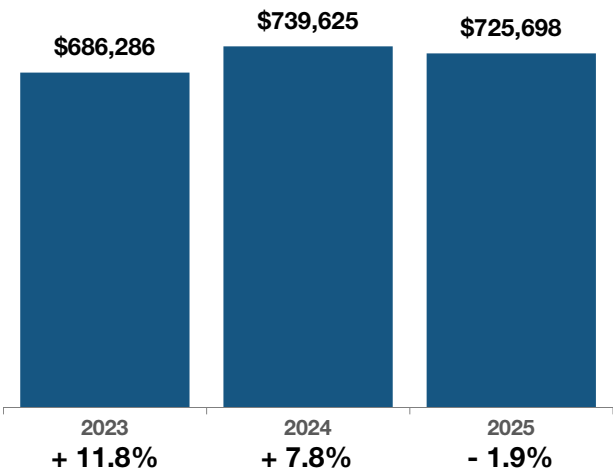


Average Sales Price

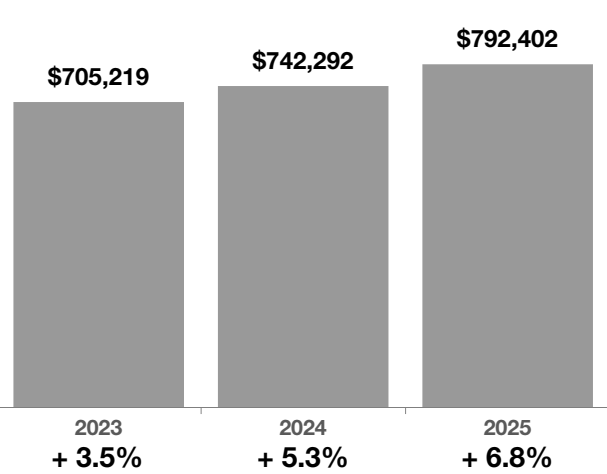
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



August



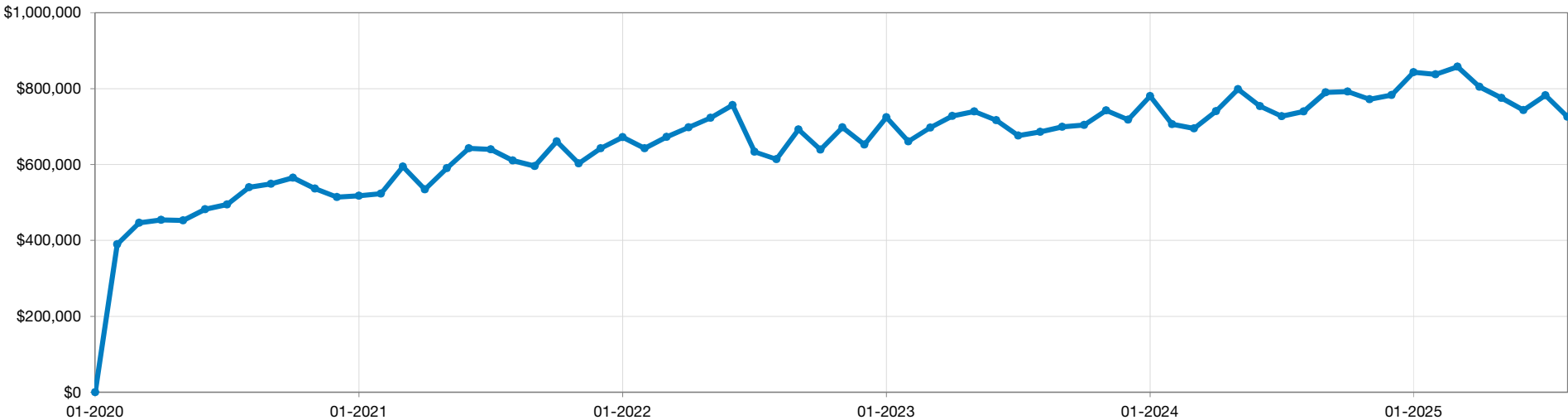
Year to Date



| | Avg. Sales Price | Prior Year | Percent Change |
|----------------|------------------|------------|----------------|
| September 2024 | \$790,472 | \$699,471 | +13.0% |
| October 2024 | \$791,894 | \$704,241 | +12.4% |
| November 2024 | \$772,131 | \$742,744 | +4.0% |
| December 2024 | \$783,354 | \$717,912 | +9.1% |
| 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 | \$782,456 | \$726,965 | +7.6% |
| August 2025 | \$725,698 | \$739,625 | -1.9% |
| 12-Month Avg* | \$792,406 | \$733,772 | +8.0% |

* Avg. Sales Price of all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Average Sales Price by Month

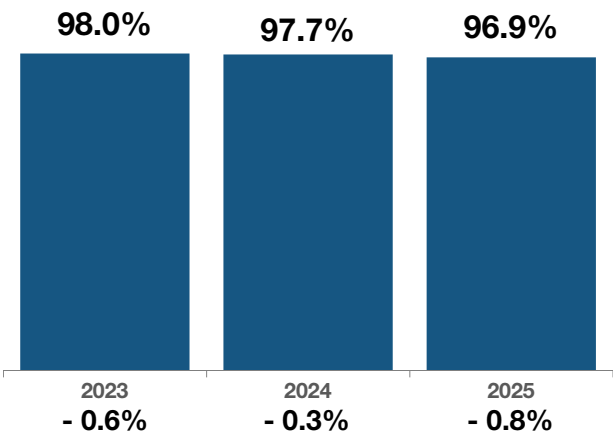


Percent of List Price Received

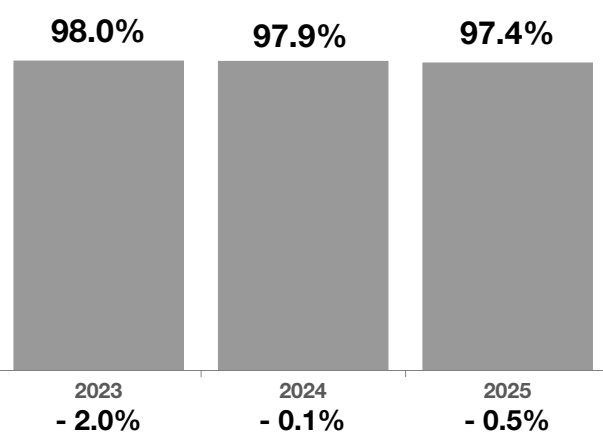
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



August



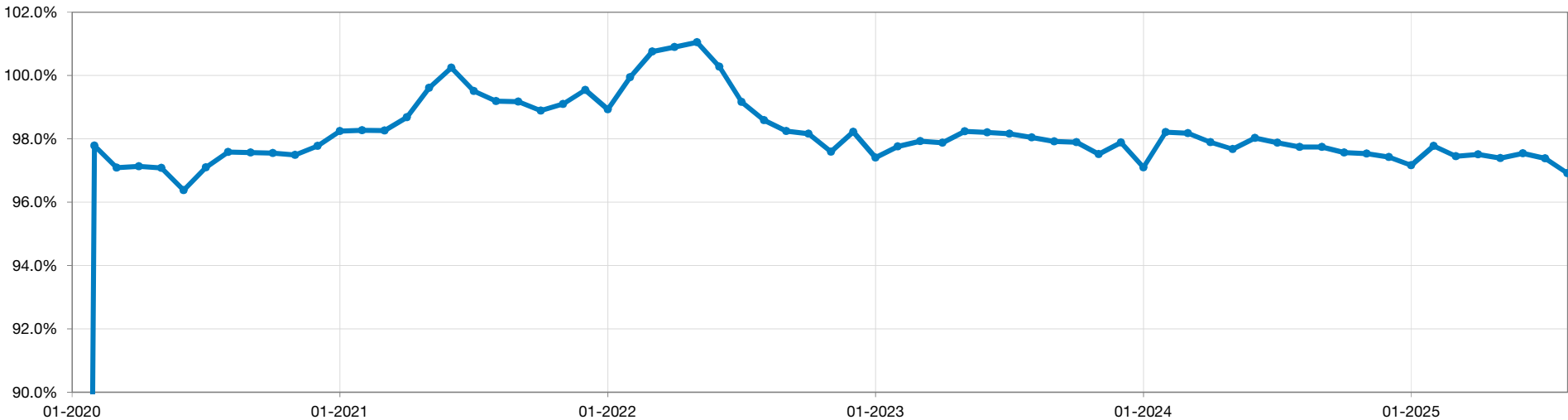
Year to Date



| Pct. of List Price Received | | Prior Year | Percent Change |
|-----------------------------|-------|------------|----------------|
| September 2024 | 97.7% | 97.9% | -0.2% |
| October 2024 | 97.6% | 97.9% | -0.3% |
| November 2024 | 97.5% | 97.5% | 0.0% |
| December 2024 | 97.4% | 97.9% | -0.5% |
| 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 | 96.9% | 97.7% | -0.8% |
| 12-Month Avg* | 97.4% | 97.9% | -0.5% |

* Average Pct. of List Price Received for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month

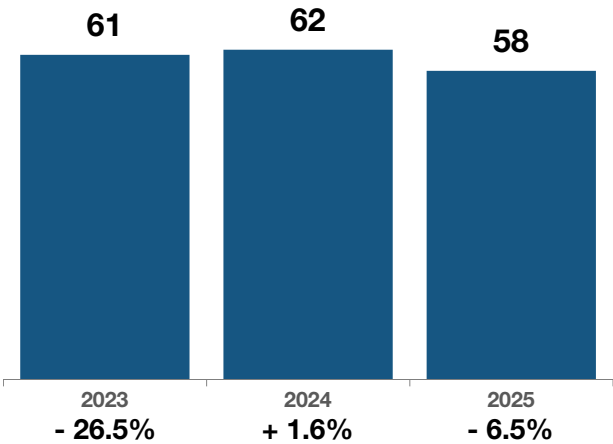


Housing Affordability Index

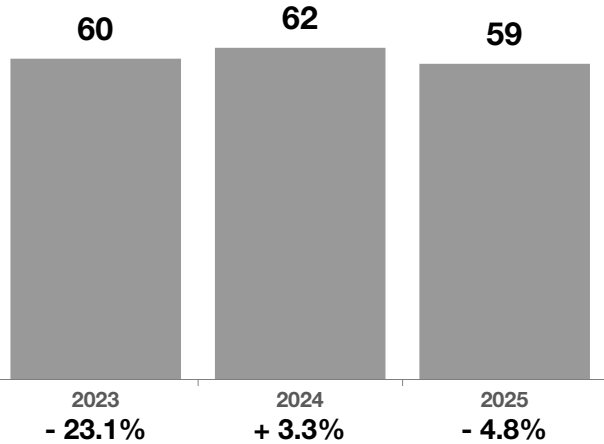
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



August

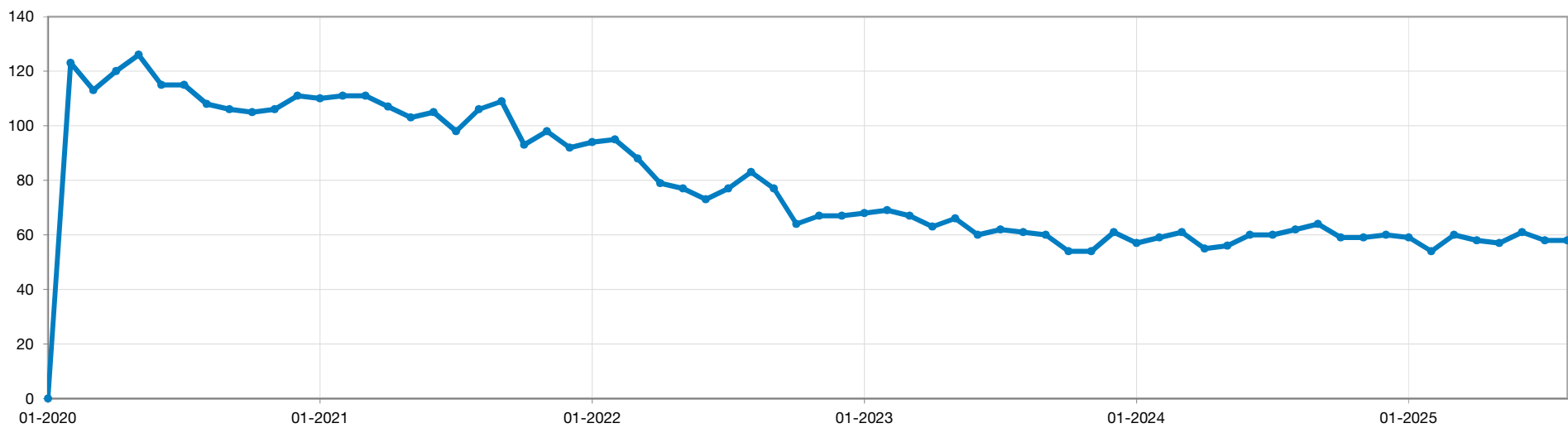


Year to Date



| Affordability Index | | Prior Year | Percent Change |
|---------------------|-----------|------------|----------------|
| September 2024 | 64 | 60 | +6.7% |
| October 2024 | 59 | 54 | +9.3% |
| November 2024 | 59 | 54 | +9.3% |
| December 2024 | 60 | 61 | -1.6% |
| 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 | 58 | 60 | -3.3% |
| August 2025 | 58 | 62 | -6.5% |
| 12-Month Avg | 59 | 58 | +1.1% |

Historical Housing Affordability Index by Month

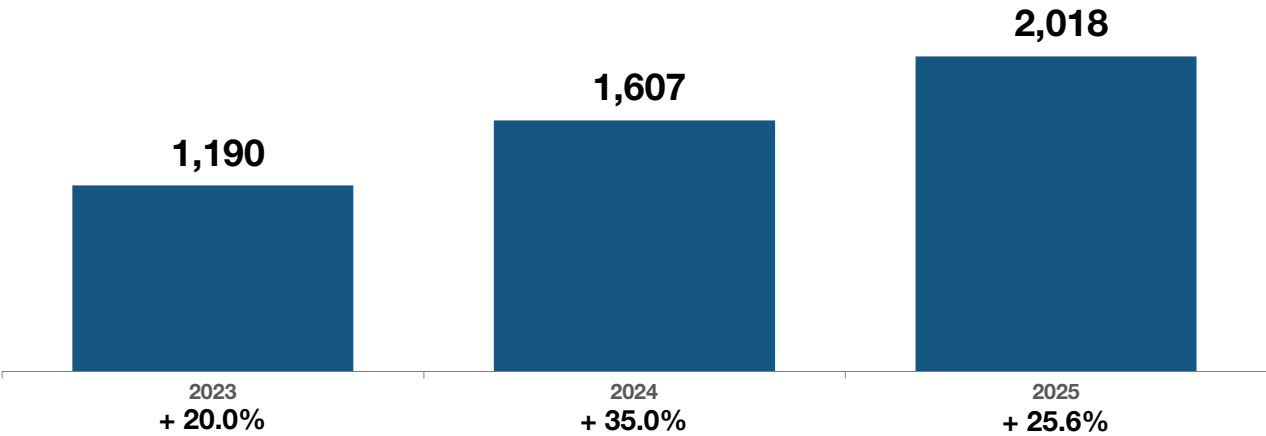


Inventory of Homes for Sale

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



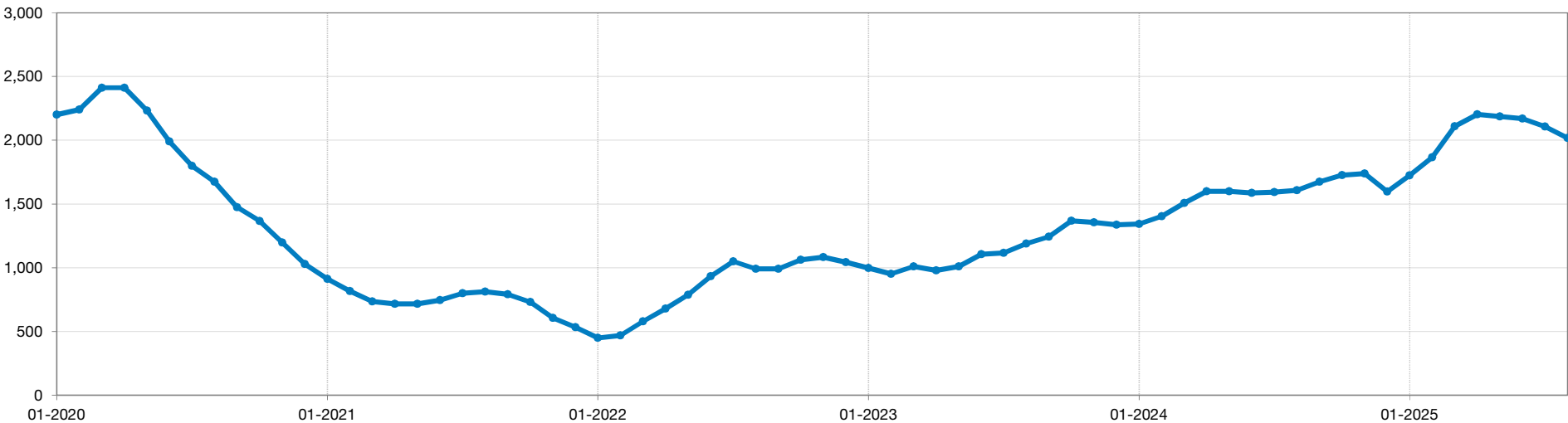
August



| Homes for Sale | | Prior Year | Percent Change |
|----------------|-------|------------|----------------|
| September 2024 | 1,675 | 1,243 | +34.8% |
| October 2024 | 1,726 | 1,368 | +26.2% |
| November 2024 | 1,738 | 1,356 | +28.2% |
| December 2024 | 1,597 | 1,337 | +19.4% |
| January 2025 | 1,725 | 1,343 | +28.4% |
| February 2025 | 1,866 | 1,403 | +33.0% |
| March 2025 | 2,110 | 1,507 | +40.0% |
| April 2025 | 2,203 | 1,599 | +37.8% |
| May 2025 | 2,187 | 1,600 | +36.7% |
| June 2025 | 2,169 | 1,587 | +36.7% |
| July 2025 | 2,107 | 1,592 | +32.3% |
| August 2025 | 2,018 | 1,607 | +25.6% |
| 12-Month Avg* | 1,927 | 1,462 | +31.8% |

* Homes for Sale for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Inventory of Homes for Sale by Month

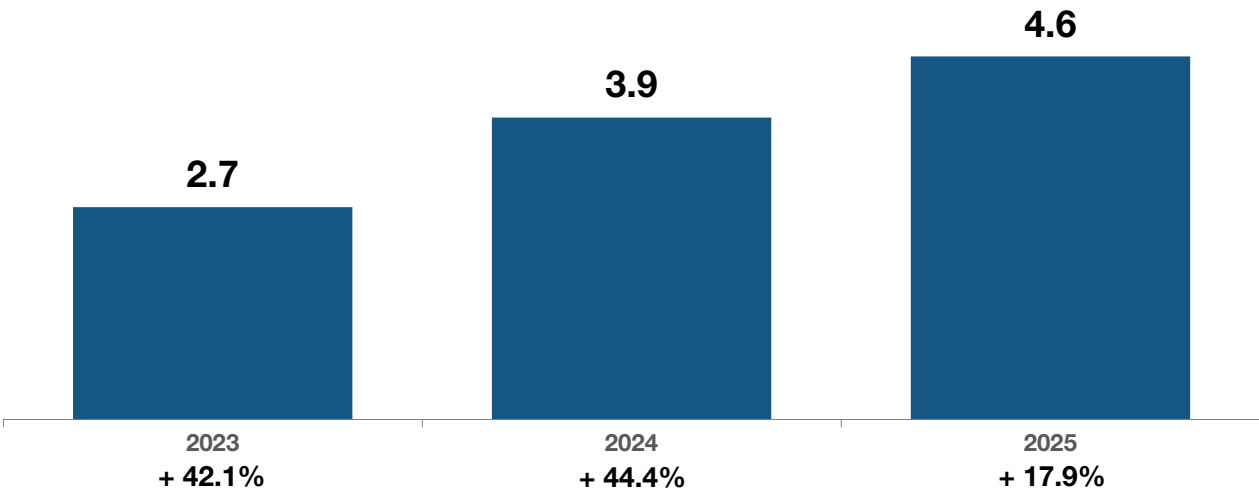


Months Supply of Inventory

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.



August



| Months Supply | | Prior Year | Percent Change |
|----------------|-----|------------|----------------|
| September 2024 | 4.0 | 2.9 | +37.9% |
| October 2024 | 4.1 | 3.2 | +28.1% |
| November 2024 | 4.1 | 3.2 | +28.1% |
| December 2024 | 3.8 | 3.1 | +22.6% |
| January 2025 | 4.1 | 3.1 | +32.3% |
| February 2025 | 4.5 | 3.3 | +36.4% |
| March 2025 | 5.0 | 3.5 | +42.9% |
| April 2025 | 5.3 | 3.7 | +43.2% |
| May 2025 | 5.2 | 3.7 | +40.5% |
| June 2025 | 5.1 | 3.7 | +37.8% |
| July 2025 | 4.9 | 3.8 | +28.9% |
| August 2025 | 4.6 | 3.9 | +17.9% |
| 12-Month Avg* | 4.6 | 3.4 | +35.3% |

* Months Supply for all properties from September 2024 through August 2025. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month

