

# Monthly Indicators



## November 2025

U.S. sales of existing homes rose 1.2% from the previous month to a seasonally adjusted annual rate of 4.10 million, according to the National Association of REALTORS® (NAR), as buyers took advantage of lower mortgage rates this fall. Sales increased in the Midwest and South, held steady in the Northeast, and edged down in the West. Year-over-year, sales were up 1.7%, with gains in the Northeast, Midwest, and South, while the West posted a decline.

New Listings were down 6.7 percent to 432. Pending Sales increased 7.6 percent to 369. Inventory grew 10.0 percent to 1,932 units.

Median Sales Price was down 1.0 percent to \$540,000. Days on Market increased 142.1 percent to 138 days. Months Supply of Inventory was up 2.4 percent to 4.3 months.

Nationally, inventory dipped 0.7% month-over-month but rose 10.9% year-over-year, totaling 1.52 million units, according to NAR. At the current sales pace, supply stands at 4.4 months, slightly below last month's level but higher than the 4.1 months recorded a year ago. Supported by modest inventory levels, prices continue to rise, with the national median existing-home price increasing 2.1% year-over-year to \$415,200, marking 28 consecutive months of annual gains.

## Quick Facts

<b>- 1.0%</b>	<b>- 1.0%</b>	<b>+ 2.4%</b>
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.



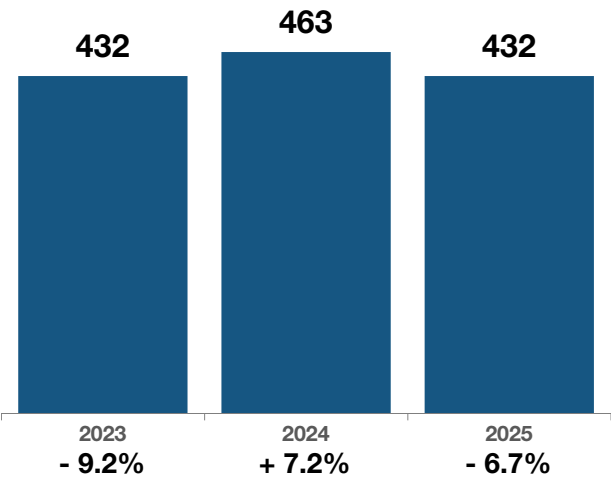
Key Metrics	Historical Sparkbars	11-2024	11-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		463	432	- 6.7%	6,324	7,014	+ 10.9%
Pending Sales		343	369	+ 7.6%	4,784	5,097	+ 6.5%
Closed Sales		386	382	- 1.0%	5,026	5,047	+ 0.4%
Days on Market		57	138	+ 142.1%	53	93	+ 75.5%
Median Sales Price		\$545,195	\$540,000	- 1.0%	\$543,000	\$549,900	+ 1.3%
Average Sales Price		\$772,131	\$769,319	- 0.4%	\$752,542	\$785,871	+ 4.4%
Pct. of List Price Received		97.5%	96.8%	- 0.7%	97.8%	97.3%	- 0.5%
Housing Affordability Index		59	61	+ 3.4%	60	60	0.0%
Inventory of Homes for Sale		1,757	1,932	+ 10.0%	--	--	--
Months Supply of Inventory		4.2	4.3	+ 2.4%	--	--	--

# New Listings

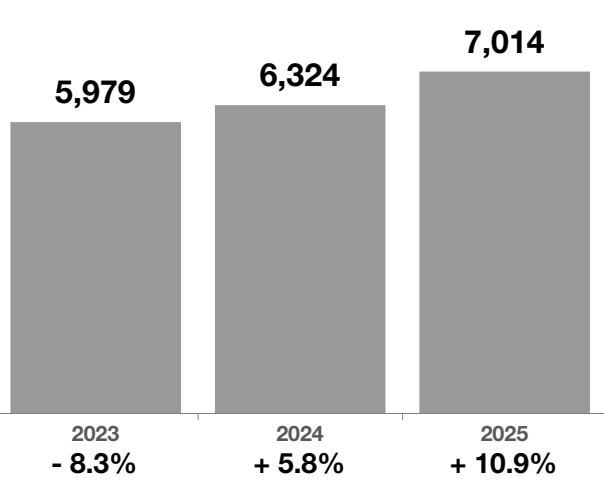
A count of the properties that have been newly listed on the market in a given month.



## November

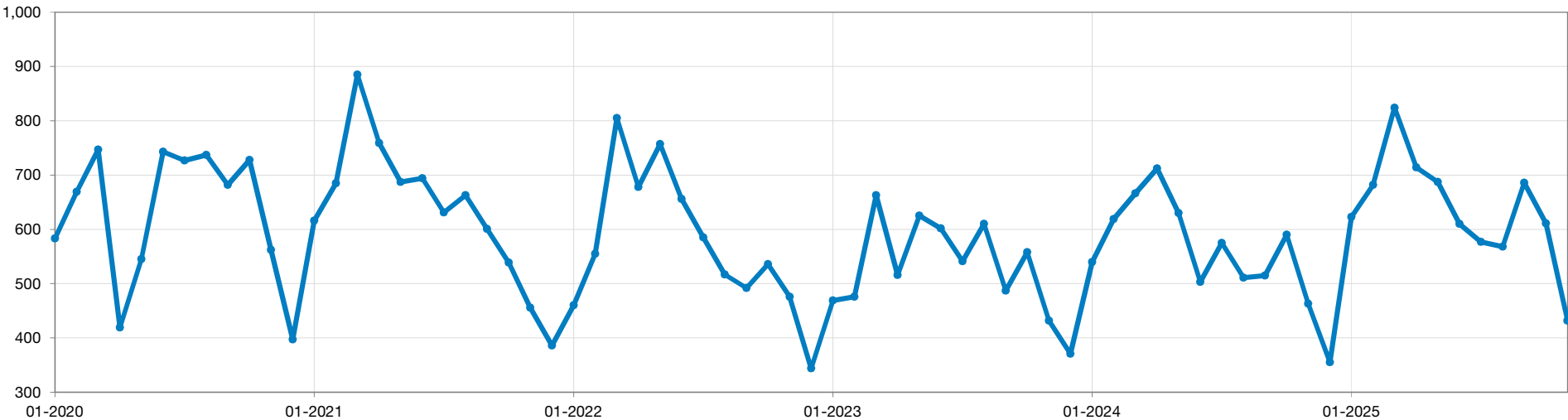


## Year to Date



New Listings		Prior Year	Percent Change
December 2024	355	371	-4.3%
January 2025	623	540	+15.4%
February 2025	682	619	+10.2%
March 2025	824	666	+23.7%
April 2025	714	712	+0.3%
May 2025	687	630	+9.0%
June 2025	610	503	+21.3%
July 2025	577	575	+0.3%
August 2025	568	511	+11.2%
September 2025	686	515	+33.2%
October 2025	611	590	+3.6%
November 2025	432	463	-6.7%
12-Month Avg	614	558	+10.1%

## Historical New Listings by Month

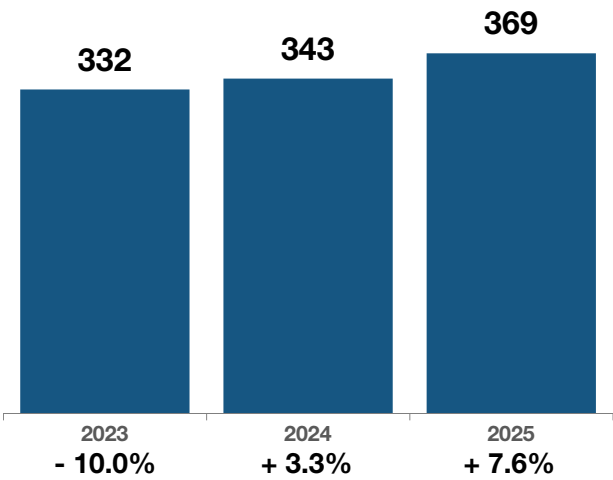


# Pending Sales

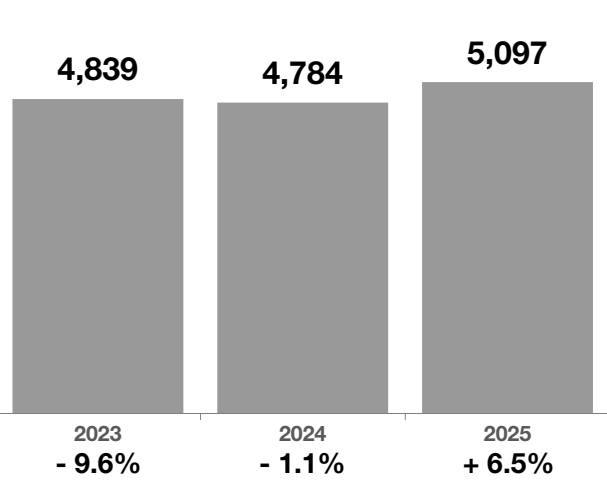
A count of the properties on which offers have been accepted in a given month.



## November

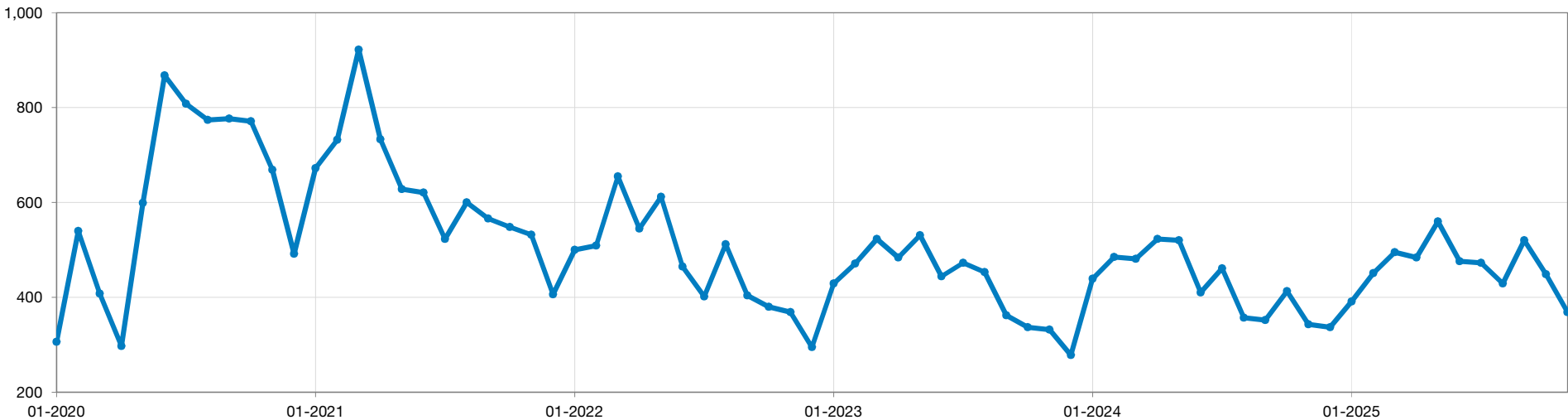


## Year to Date



Pending Sales		Prior Year	Percent Change
December 2024	337	278	+21.2%
January 2025	391	439	-10.9%
February 2025	451	485	-7.0%
March 2025	495	481	+2.9%
April 2025	484	523	-7.5%
May 2025	560	520	+7.7%
June 2025	476	410	+16.1%
July 2025	473	461	+2.6%
August 2025	429	357	+20.2%
September 2025	520	352	+47.7%
October 2025	449	413	+8.7%
November 2025	369	343	+7.6%
12-Month Avg	453	422	+7.3%

## Historical Pending Sales by Month

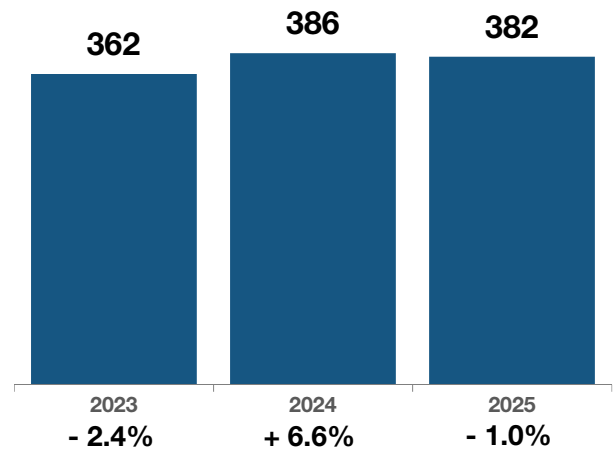


# Closed Sales

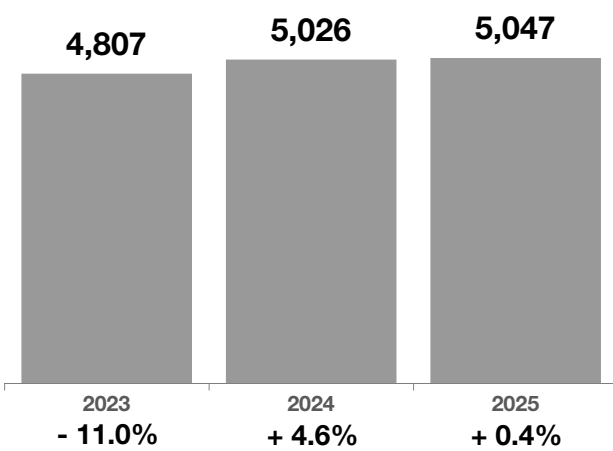
A count of the actual sales that closed in a given month.



## November

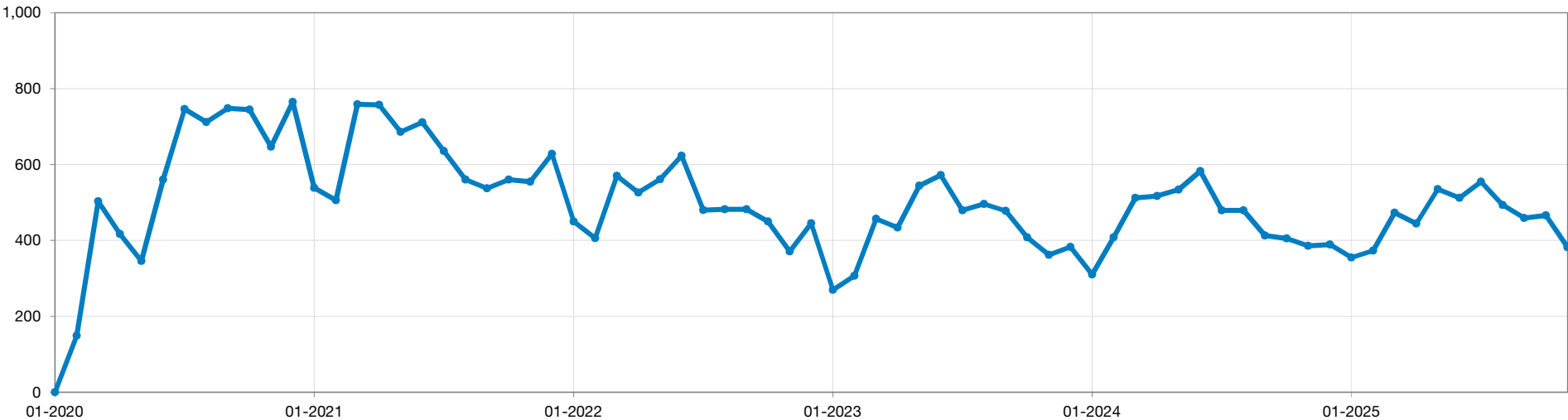


## Year to Date



Closed Sales		Prior Year	Percent Change
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	555	479	+15.9%
August 2025	493	479	+2.9%
September 2025	459	413	+11.1%
October 2025	466	405	+15.1%
November 2025	382	386	-1.0%
12-Month Avg	453	451	+0.5%

## Historical Closed Sales by Month

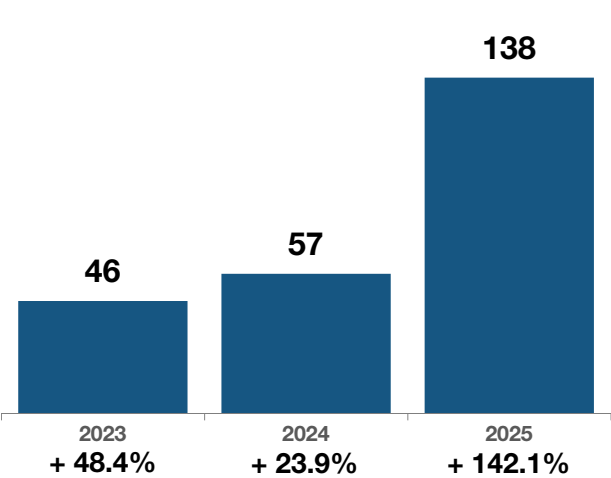


# Days on Market Until Sale

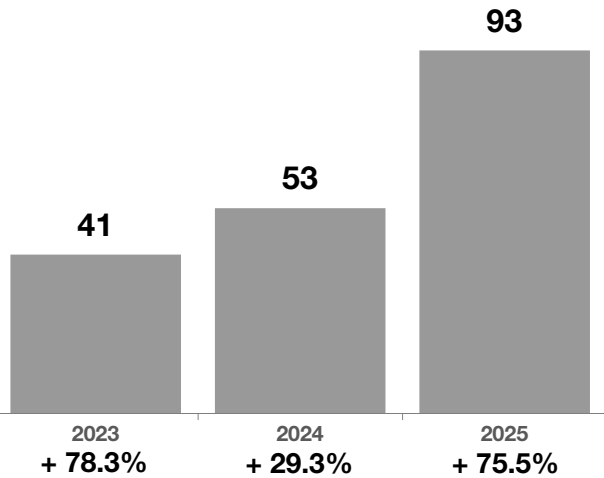
Average number of days between when a property is listed and when an offer is accepted in a given month.



## November



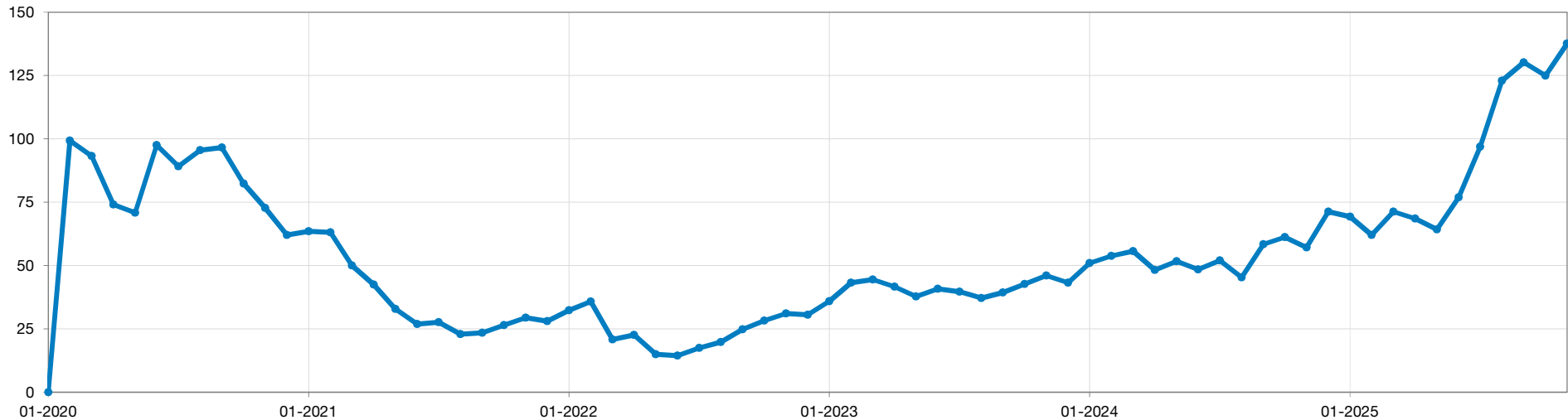
## Year to Date



Days on Market		Prior Year	Percent Change
December 2024	71	43	+65.1%
January 2025	69	51	+35.3%
February 2025	62	54	+14.8%
March 2025	71	56	+26.8%
April 2025	69	48	+43.8%
May 2025	64	52	+23.1%
June 2025	77	48	+60.4%
July 2025	97	52	+86.5%
August 2025	123	45	+173.3%
September 2025	130	58	+124.1%
October 2025	125	61	+104.9%
November 2025	138	57	+142.1%
12-Month Avg*	92	52	+76.9%

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

## Historical Days on Market Until Sale by Month

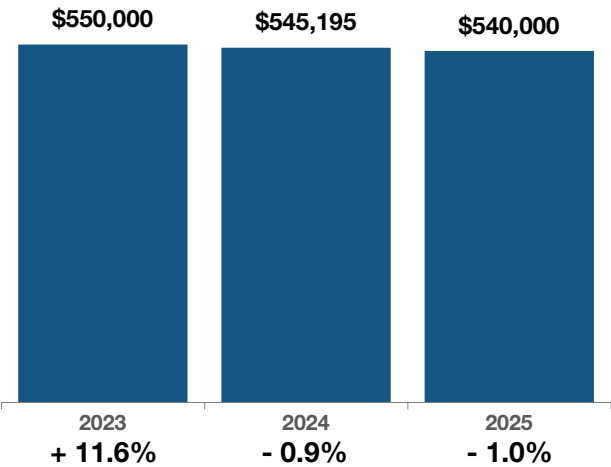


# Median Sales Price

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



## November



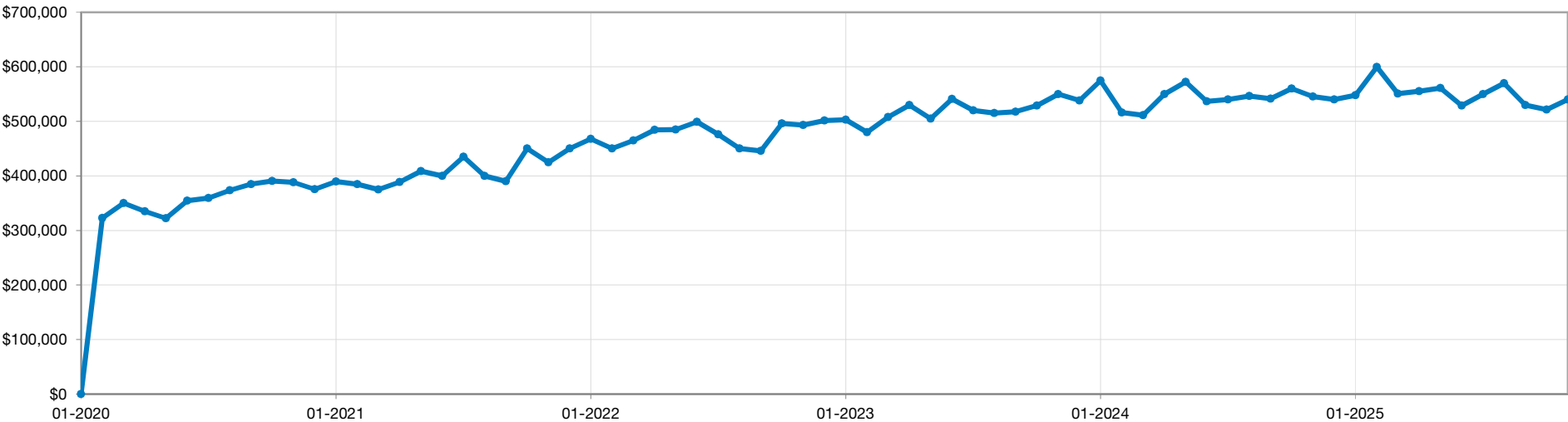
## Year to Date



	Median Sales Price	Prior Year	Percent Change
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	\$550,000	\$540,000	+1.9%
August 2025	\$570,000	\$546,386	+4.3%
September 2025	\$530,000	\$541,500	-2.1%
October 2025	\$521,500	\$560,000	-6.9%
November 2025	\$540,000	\$545,195	-1.0%
12-Month Med*	\$547,920	\$542,250	+1.0%

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

## Historical Median Sales Price by Month

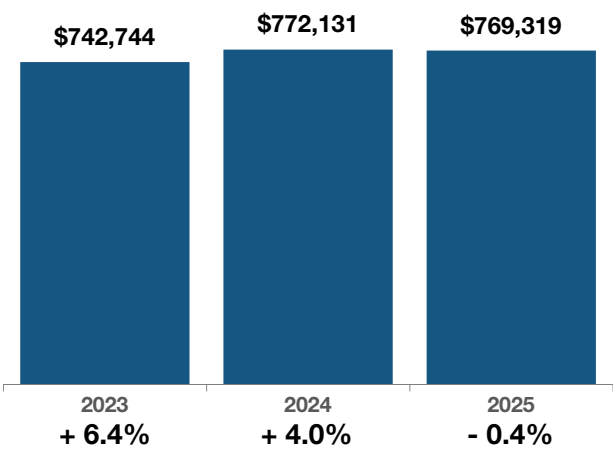


# Average Sales Price

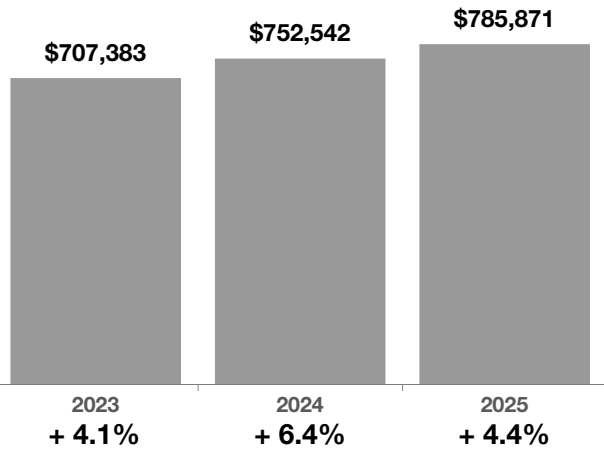
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## November



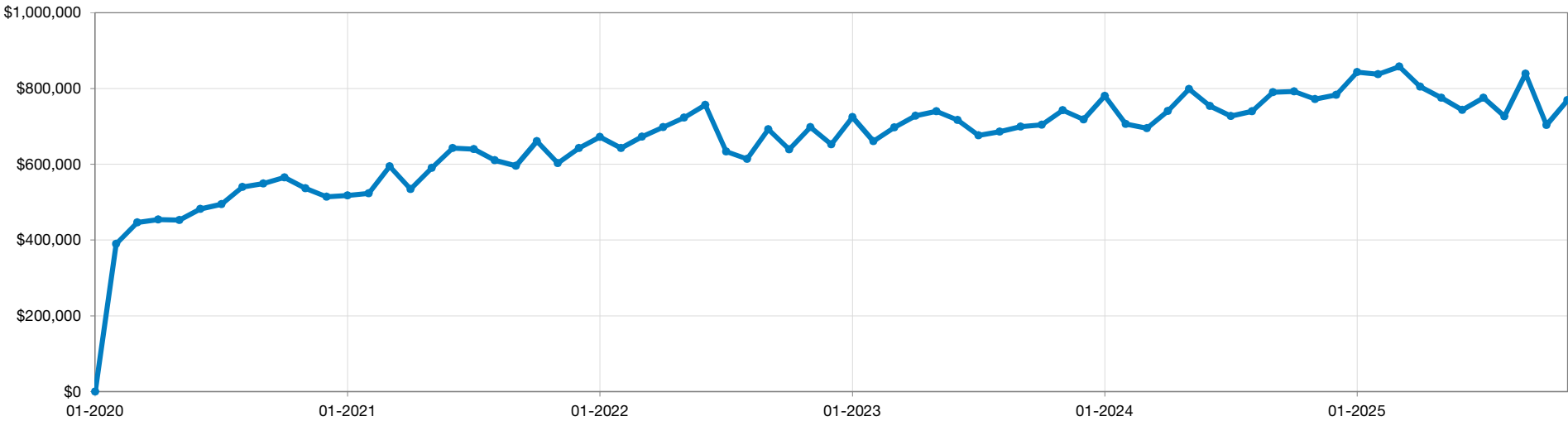
## Year to Date



Avg. Sales Price		Prior Year	Percent Change
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	\$775,783	\$726,965	+6.7%
August 2025	\$726,522	\$739,625	-1.8%
September 2025	\$839,142	\$790,472	+6.2%
October 2025	\$703,761	\$791,894	-11.1%
November 2025	\$769,319	\$772,131	-0.4%
12-Month Avg*	\$788,396	\$751,109	+5.0%

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

## Historical Average Sales Price by Month



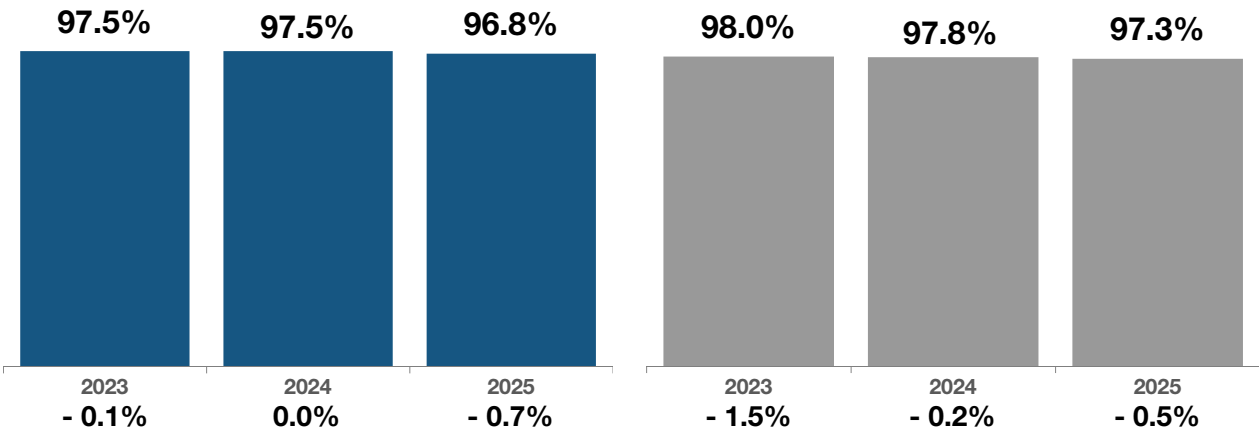


# Percent of List Price Received

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.



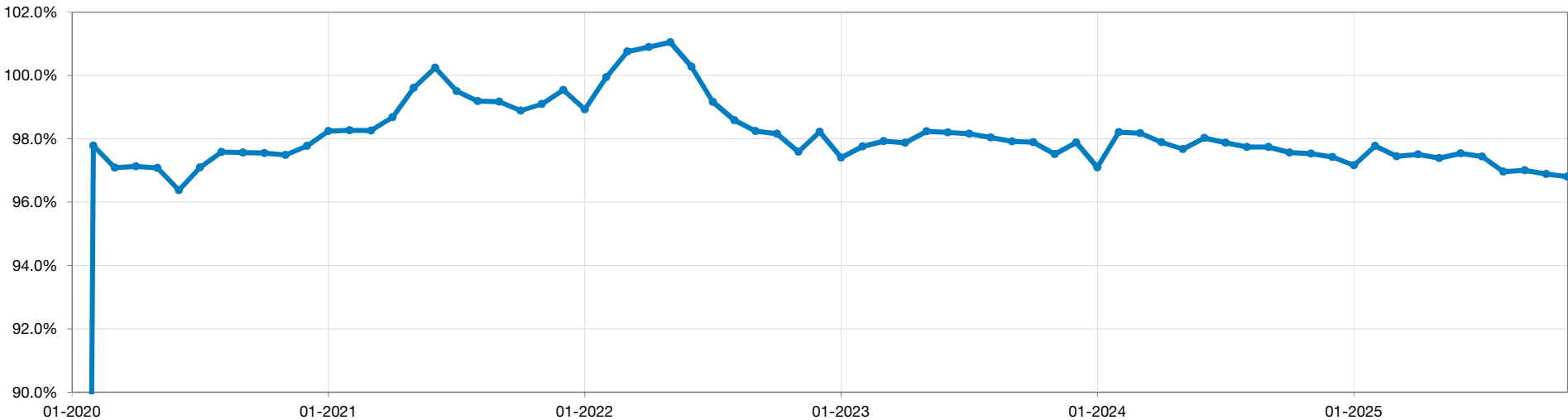
## November



Pct. of List Price Received		Prior Year	Percent Change
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	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%
12-Month Avg*	97.3%	97.8%	-0.5%

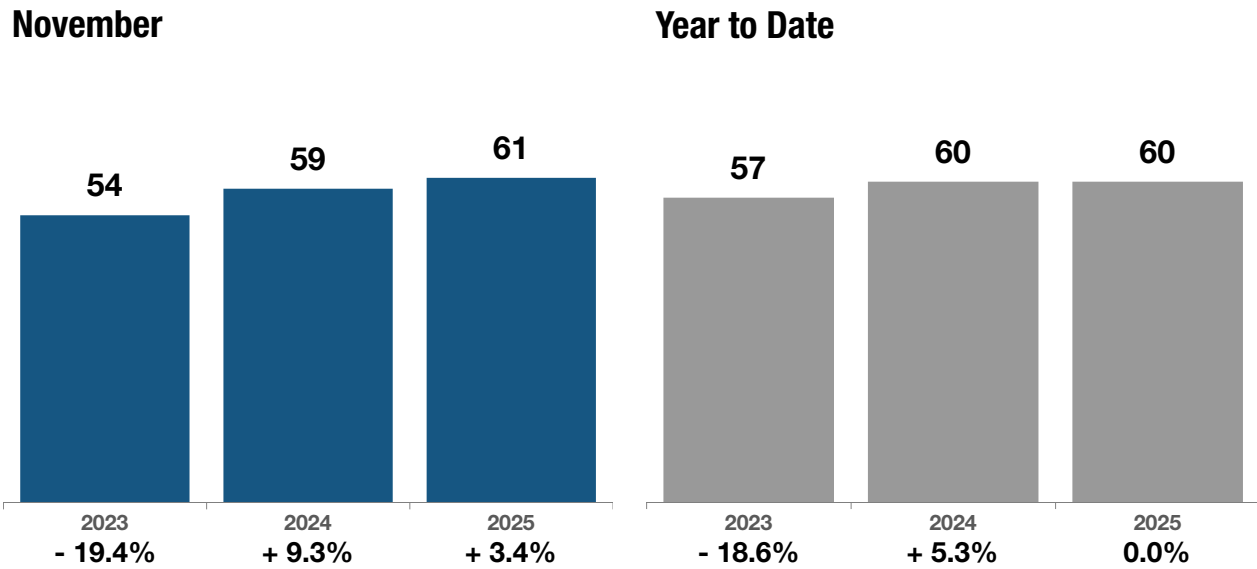
\* Average Pct. of List Price Received for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

## Historical Percent of List Price Received by Month



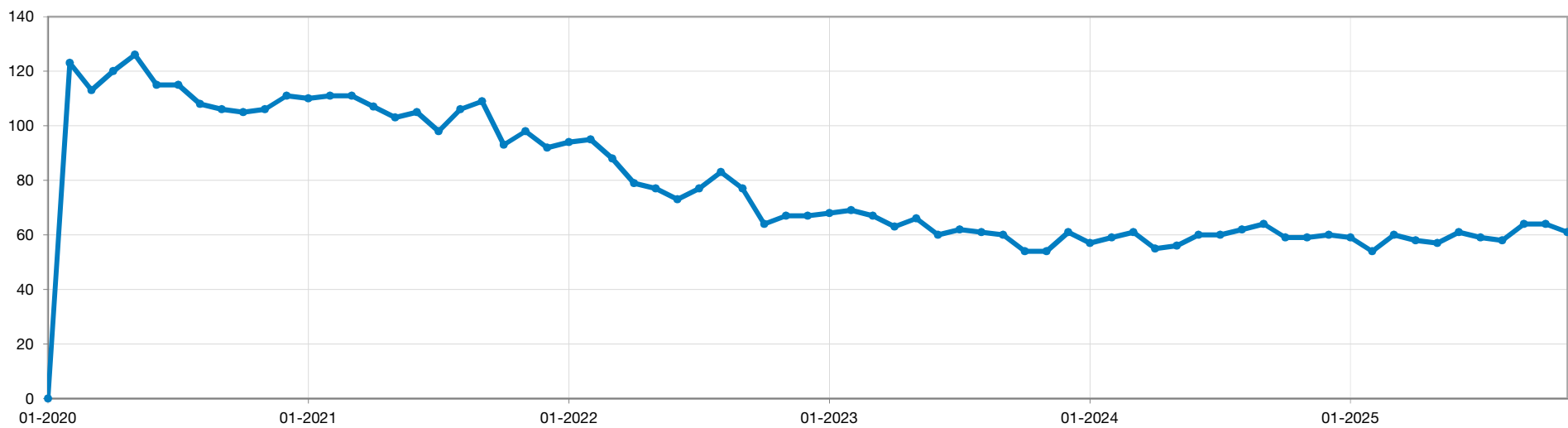
# Housing Affordability Index

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.



Affordability Index		Prior Year	Percent Change
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	59	60	-1.7%
August 2025	58	62	-6.5%
September 2025	64	64	0.0%
October 2025	64	59	+8.5%
November 2025	61	59	+3.4%
12-Month Avg		60	+0.3%

## Historical Housing Affordability Index by Month

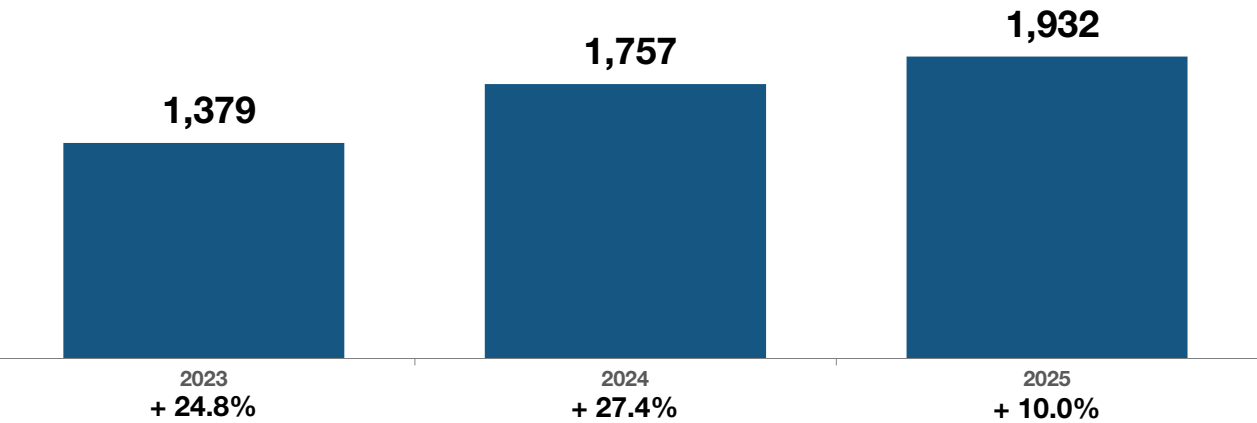


# Inventory of Homes for Sale

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



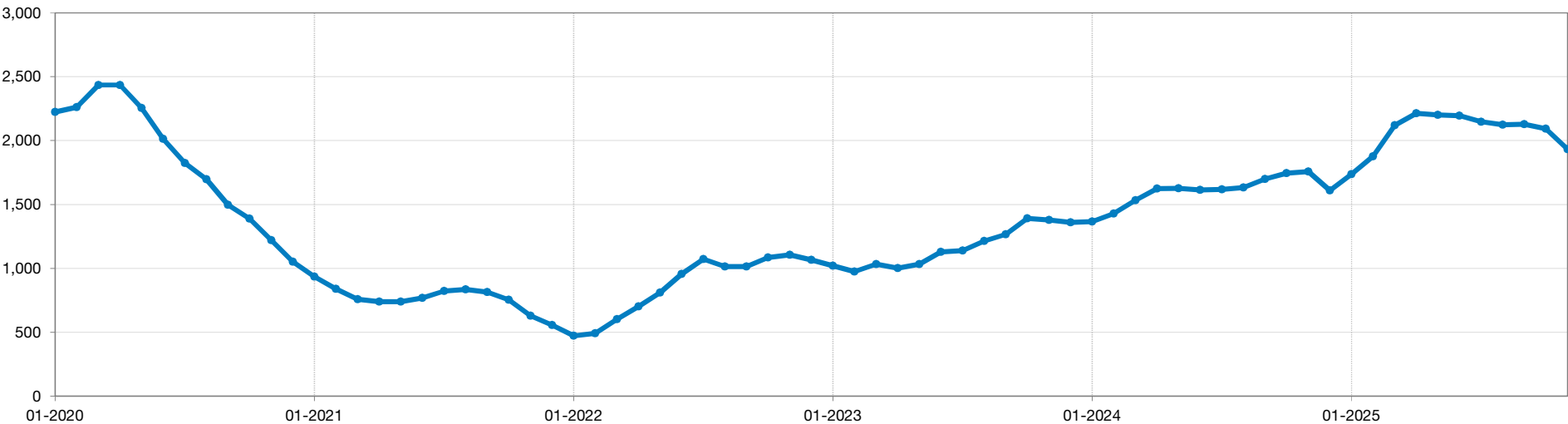
## November



Homes for Sale		Prior Year	Percent Change
December 2024	1,609	1,360	+18.3%
January 2025	1,736	1,366	+27.1%
February 2025	1,877	1,428	+31.4%
March 2025	2,119	1,532	+38.3%
April 2025	2,213	1,625	+36.2%
May 2025	2,200	1,626	+35.3%
June 2025	2,194	1,613	+36.0%
July 2025	2,147	1,618	+32.7%
August 2025	2,124	1,633	+30.1%
September 2025	2,129	1,700	+25.2%
October 2025	2,093	1,745	+19.9%
November 2025	1,932	1,757	+10.0%
12-Month Avg*	2,031	1,584	+28.2%

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

## Historical Inventory of Homes for Sale by Month

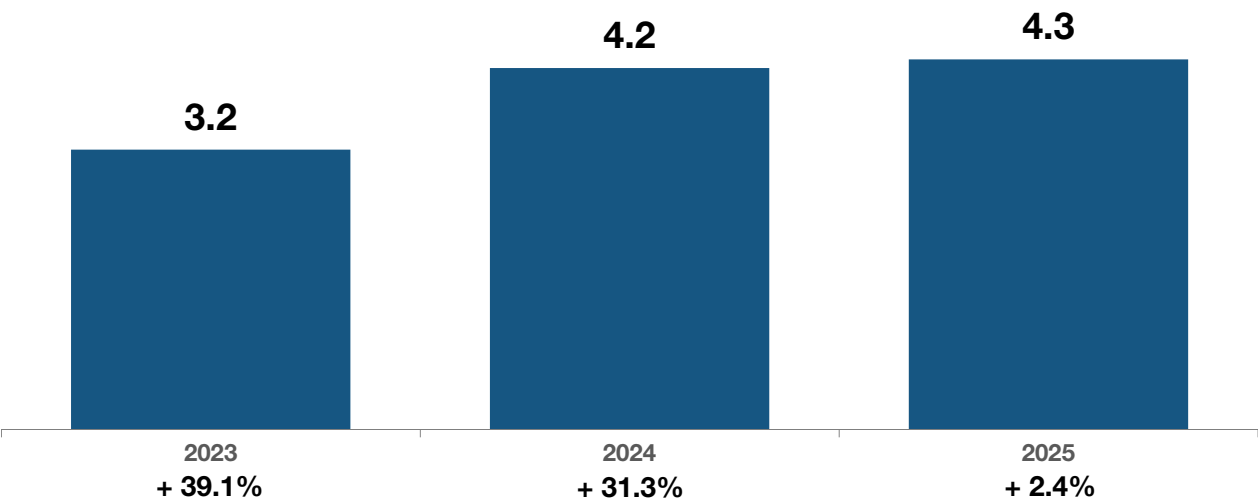


# Months Supply of Inventory

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.



## November



Months Supply		Prior Year	Percent Change
December 2024	3.8	3.2	+18.8%
January 2025	4.1	3.2	+28.1%
February 2025	4.5	3.3	+36.4%
March 2025	5.0	3.6	+38.9%
April 2025	5.3	3.8	+39.5%
May 2025	5.2	3.8	+36.8%
June 2025	5.1	3.8	+34.2%
July 2025	5.0	3.8	+31.6%
August 2025	4.9	3.9	+25.6%
September 2025	4.8	4.1	+17.1%
October 2025	4.6	4.1	+12.2%
November 2025	4.3	4.2	+2.4%
12-Month Avg*	4.7	3.7	+27.0%

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

## Historical Months Supply of Inventory by Month

