

Monthly Indicators



January 2026

U.S. existing-home sales climbed 5.1% month-over-month and 1.4% year-over-year to a seasonally adjusted annual rate of 4.35 million units, the strongest pace in nearly three years, according to the National Association of REALTORS® (NAR). Lower mortgage rates and slower home price growth helped spur buyer activity, and sales increased month-over-month in every region. On an annual basis, sales rose in the South, held steady in the West and Midwest, and declined in the Northeast.

New Listings were up 1.8 percent to 635. Pending Sales increased 18.6 percent to 465. Inventory grew 6.2 percent to 1,847 units.

Median Sales Price was up 11.3 percent to \$609,965. Days on Market increased 111.6 percent to 146 days. Months Supply of Inventory remained flat at 4.1.

Nationally, there were 1.18 million homes for sale heading into January, an 18.1% decline from the previous month but 3.5% higher compared to the same period last year, representing a 3.3-month supply at the current sales pace, according to NAR. Meanwhile, the median existing-home price rose 0.4% from a year ago to \$405,400, reflecting a continued moderation in national price growth.

Quick Facts

- 1.1%	+ 11.3%	0.0%
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 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.



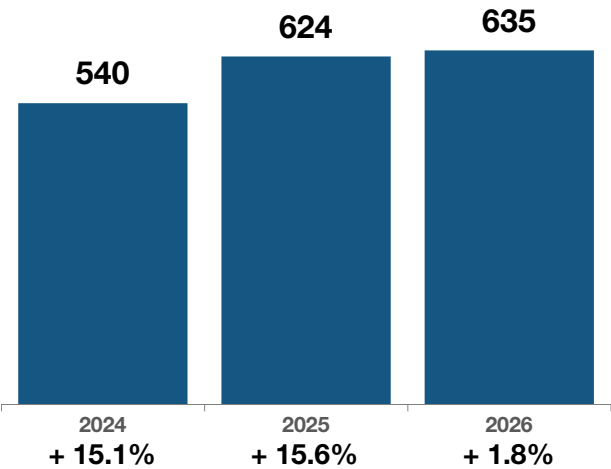
Key Metrics	Historical Sparkbars	01-2025	01-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		624	635	+ 1.8%	624	635	+ 1.8%
Pending Sales		392	465	+ 18.6%	392	465	+ 18.6%
Closed Sales		355	351	- 1.1%	355	351	- 1.1%
Days on Market		69	146	+ 111.6%	69	146	+ 111.6%
Median Sales Price		\$547,900	\$609,965	+ 11.3%	\$547,900	\$609,965	+ 11.3%
Average Sales Price		\$843,279	\$938,483	+ 11.3%	\$843,279	\$938,483	+ 11.3%
Pct. of List Price Received		97.2%	96.5%	- 0.7%	97.2%	96.5%	- 0.7%
Housing Affordability Index		63	58	- 7.9%	63	58	- 7.9%
Inventory of Homes for Sale		1,739	1,847	+ 6.2%	--	--	--
Months Supply of Inventory		4.1	4.1	0.0%	--	--	--

New Listings

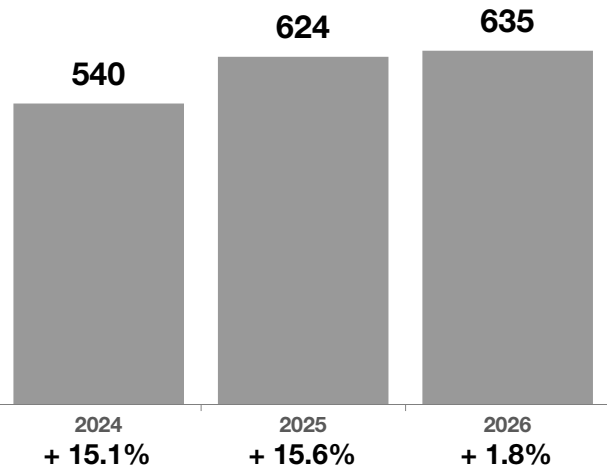
A count of the properties that have been newly listed on the market in a given month.



January

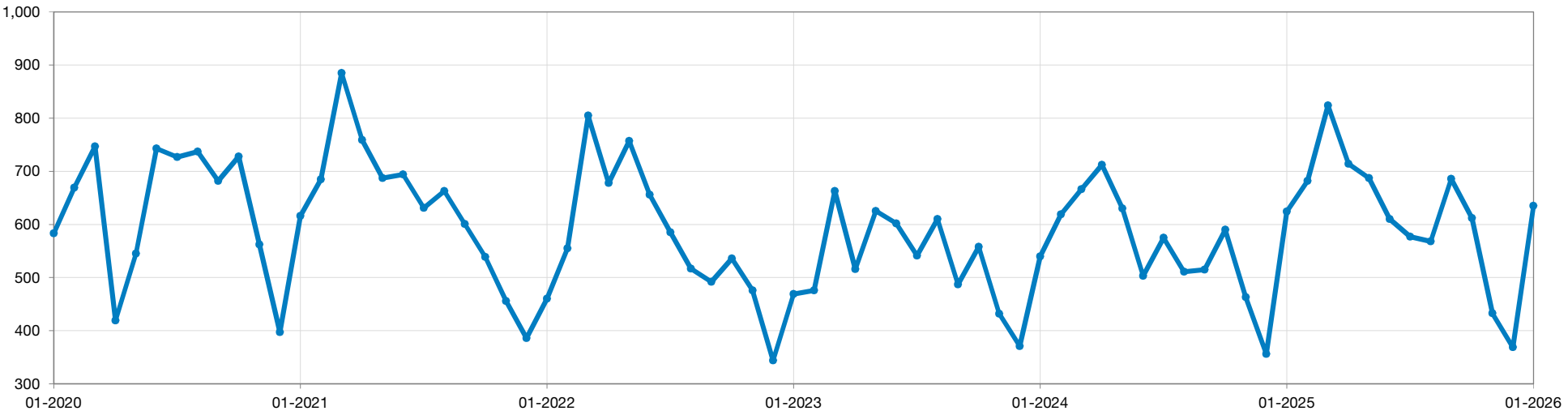


Year to Date



New Listings		Prior Year	Percent Change
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	612	590	+3.7%
November 2025	433	463	-6.5%
December 2025	369	356	+3.7%
January 2026	635	624	+1.8%
12-Month Avg	616	564	+9.4%

Historical New Listings by Month

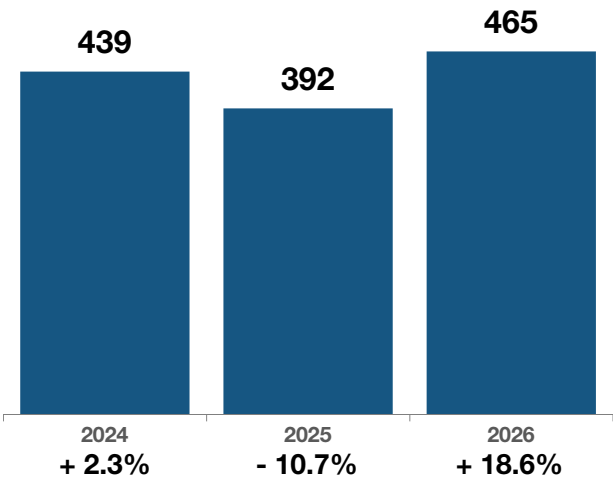


Pending Sales

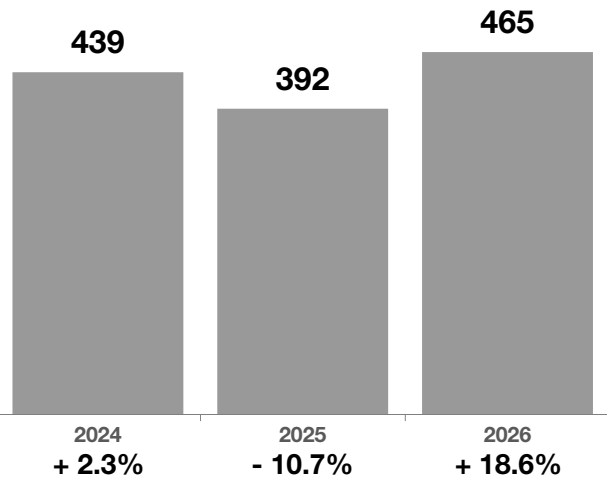
A count of the properties on which offers have been accepted in a given month.



January

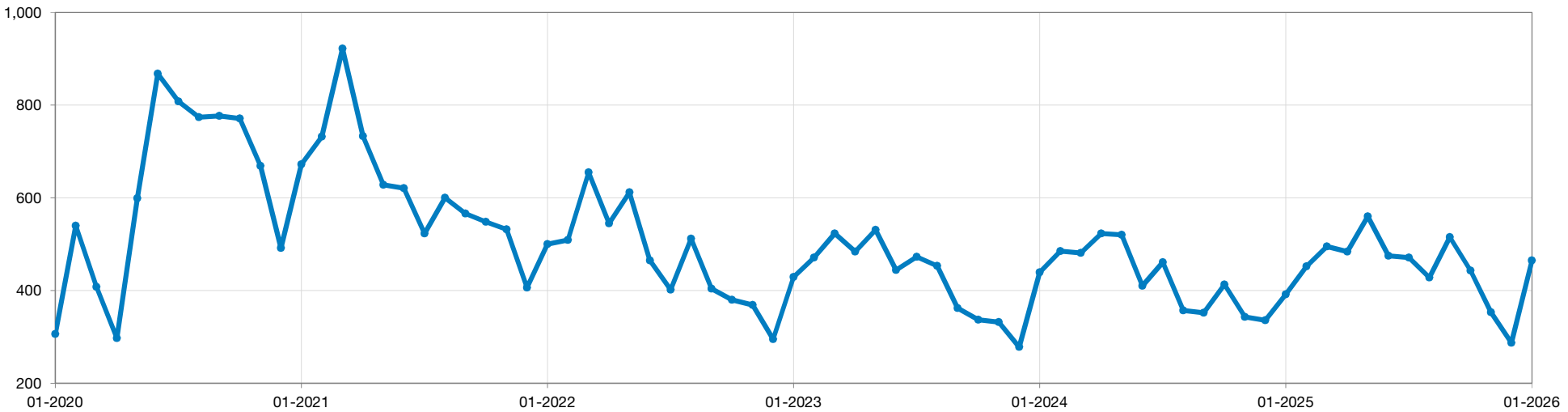


Year to Date



Pending Sales		Prior Year	Percent Change
February 2025	452	485	-6.8%
March 2025	495	481	+2.9%
April 2025	484	523	-7.5%
May 2025	560	520	+7.7%
June 2025	475	410	+15.9%
July 2025	471	461	+2.2%
August 2025	428	357	+19.9%
September 2025	515	352	+46.3%
October 2025	443	413	+7.3%
November 2025	353	343	+2.9%
December 2025	287	336	-14.6%
January 2026	465	392	+18.6%
12-Month Avg	452	423	+7.0%

Historical Pending Sales by Month

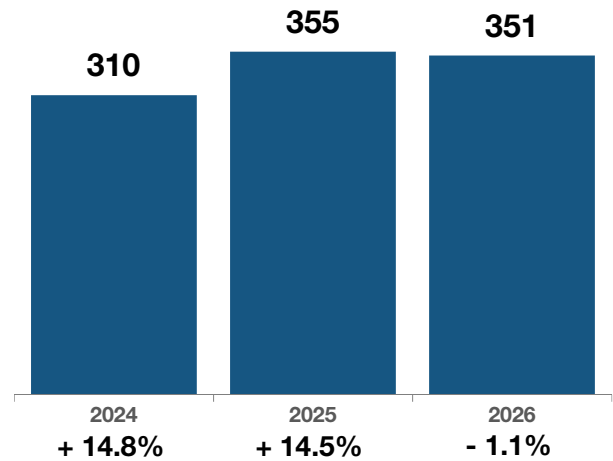


Closed Sales

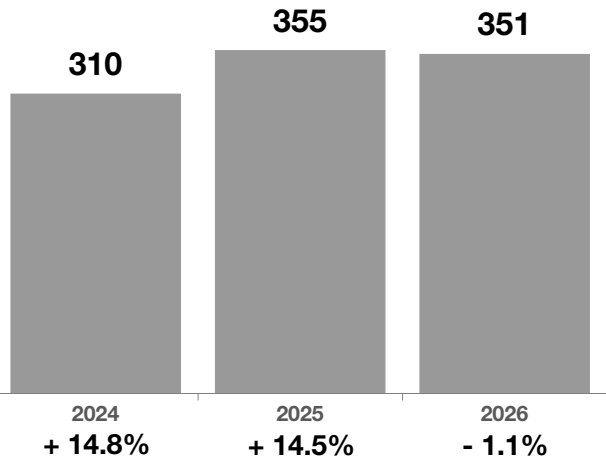
A count of the actual sales that closed in a given month.



January

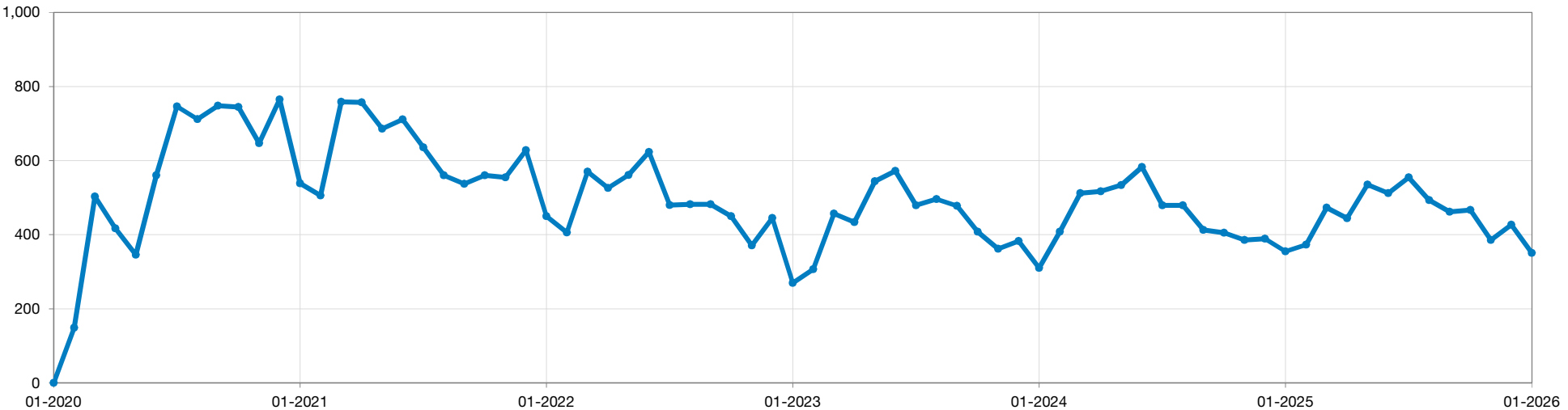


Year to Date



Closed Sales		Prior Year	Percent Change
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	462	413	+11.9%
October 2025	467	405	+15.3%
November 2025	386	386	0.0%
December 2025	427	389	+9.8%
January 2026	351	355	-1.1%
12-Month Avg	457	455	+0.3%

Historical Closed Sales by Month

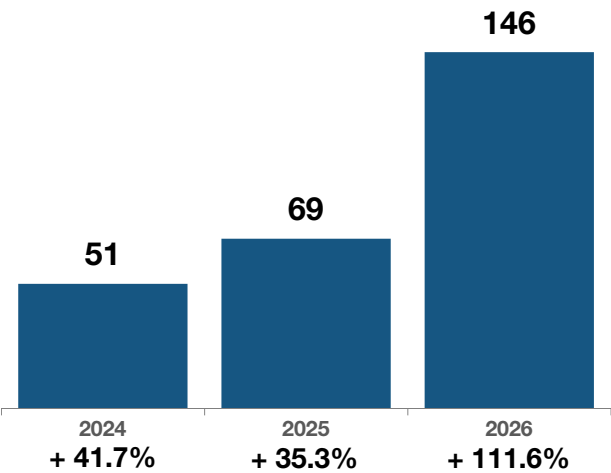


Days on Market Until Sale

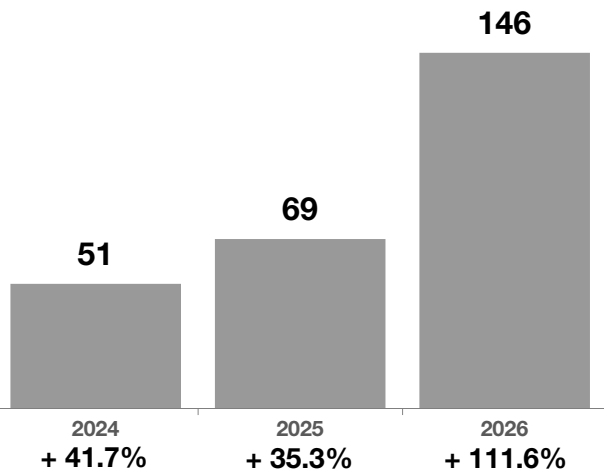
Average number of days between when a property is listed and when an offer is accepted in a given month.



January



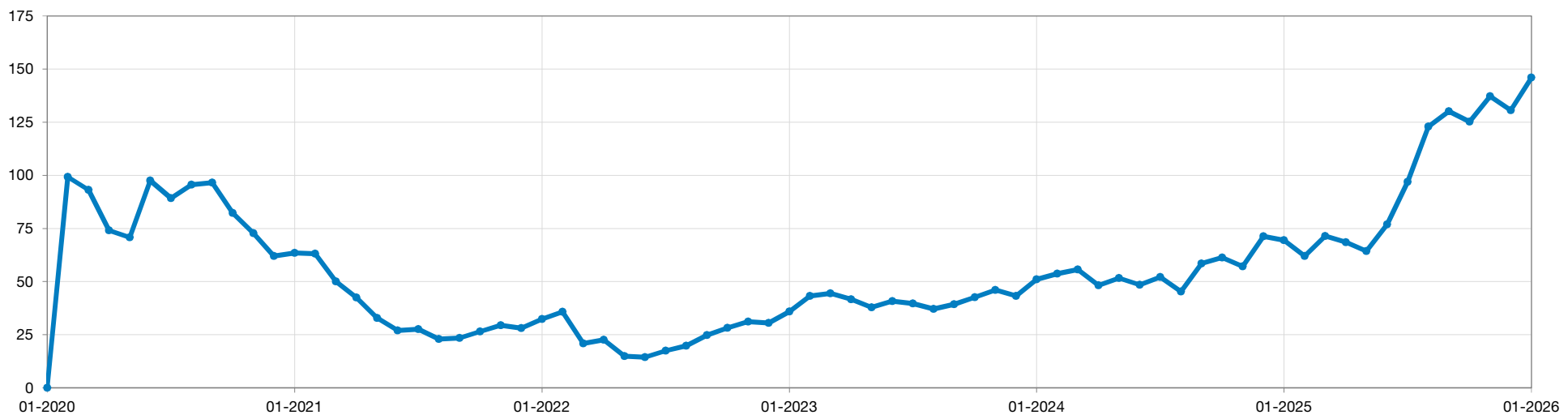
Year to Date



Days on Market		Prior Year	Percent Change
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	137	57	+140.4%
December 2025	131	71	+84.5%
January 2026	146	69	+111.6%
12-Month Avg*	101	55	+83.6%

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

Historical Days on Market Until Sale by Month

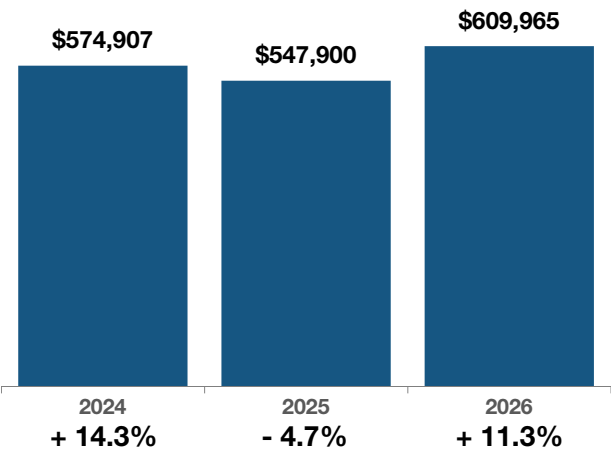


Median Sales Price

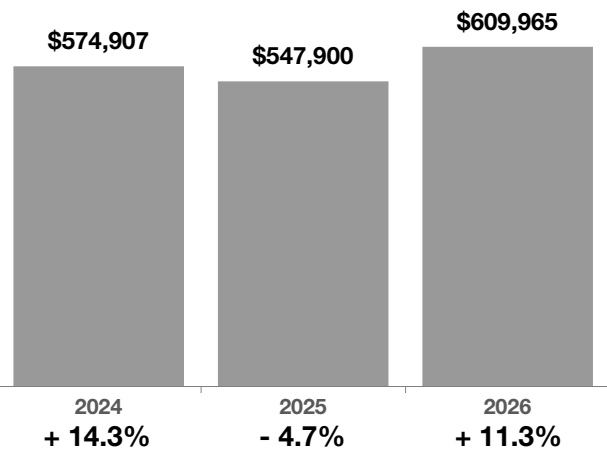
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



January



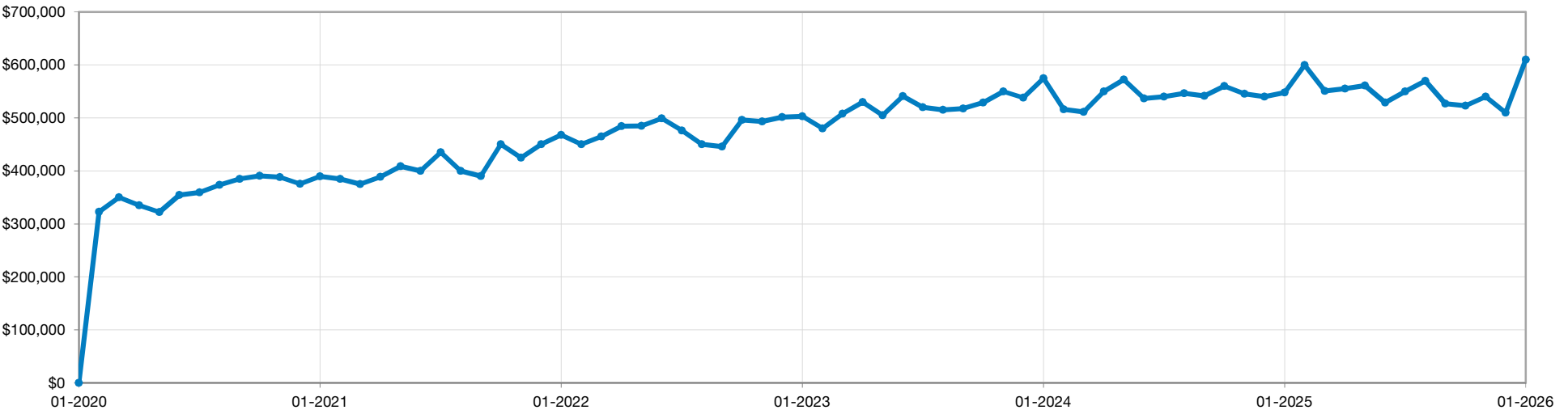
Year to Date



Median Sales Price		Prior Year	Percent Change
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	\$527,083	\$541,500	-2.7%
October 2025	\$523,000	\$560,000	-6.6%
November 2025	\$540,000	\$545,195	-1.0%
December 2025	\$510,000	\$540,000	-5.6%
January 2026	\$609,965	\$547,900	+11.3%
12-Month Med*	\$550,000	\$540,544	+1.7%

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

Historical Median Sales Price by Month

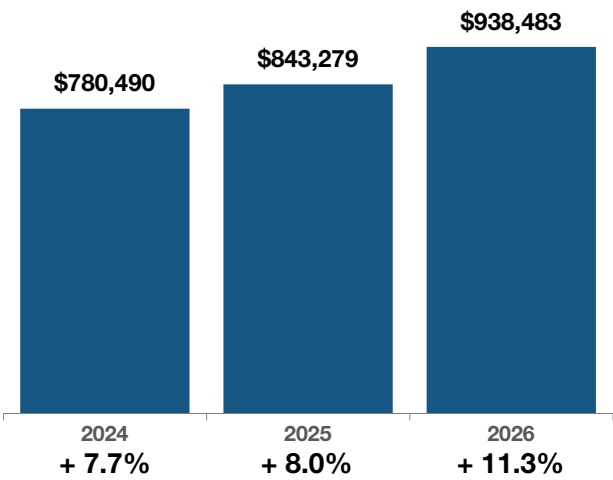


Average Sales Price

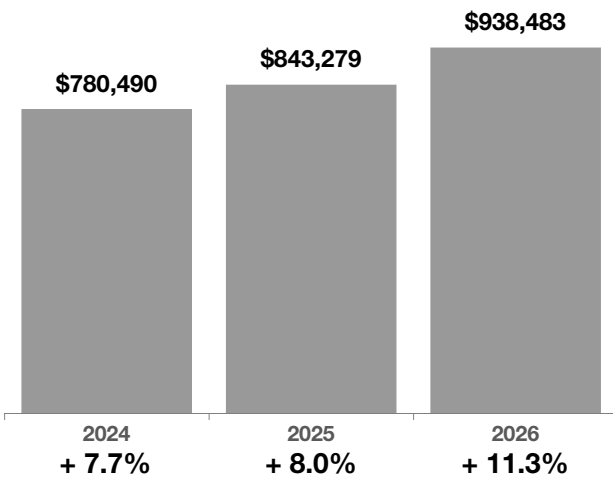
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



January



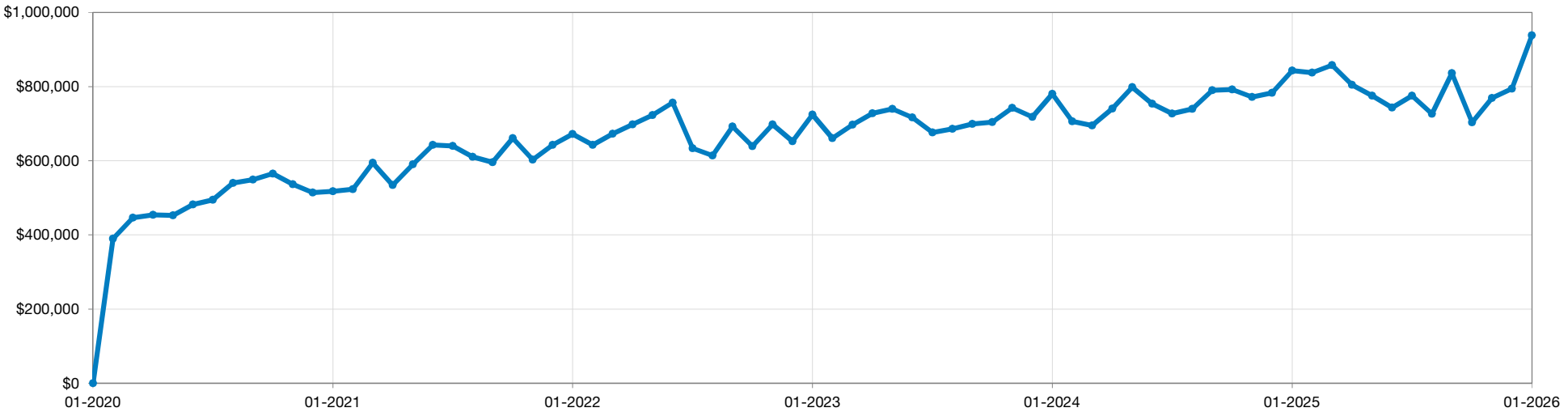
Year to Date



Avg. Sales Price		Prior Year	Percent Change
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	\$836,415	\$790,472	+5.8%
October 2025	\$703,450	\$791,894	-11.2%
November 2025	\$768,880	\$772,131	-0.4%
December 2025	\$794,399	\$783,354	+1.4%
January 2026	\$938,483	\$843,279	+11.3%
12-Month Avg*	\$796,960	\$761,795	+4.6%

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

Historical Average Sales Price by Month

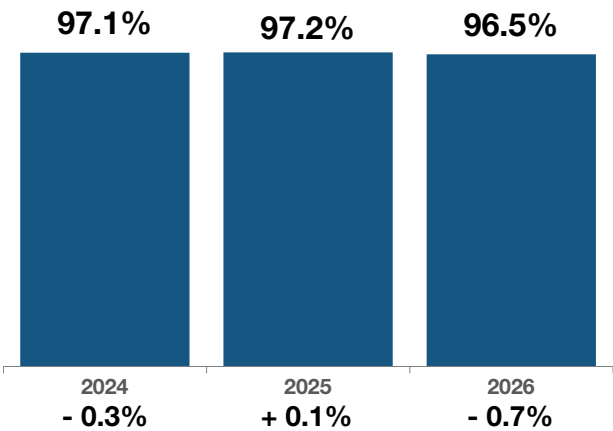


Percent of List Price Received

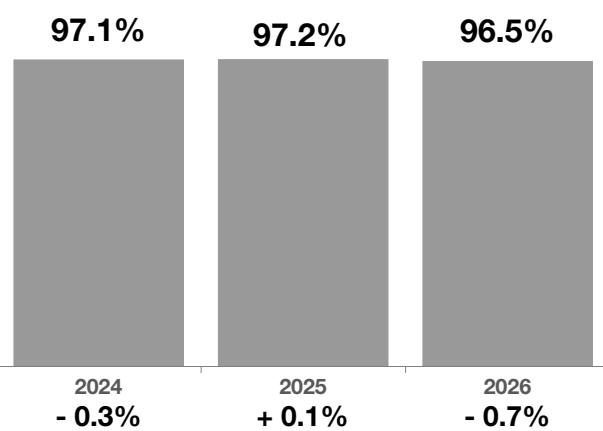
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



January



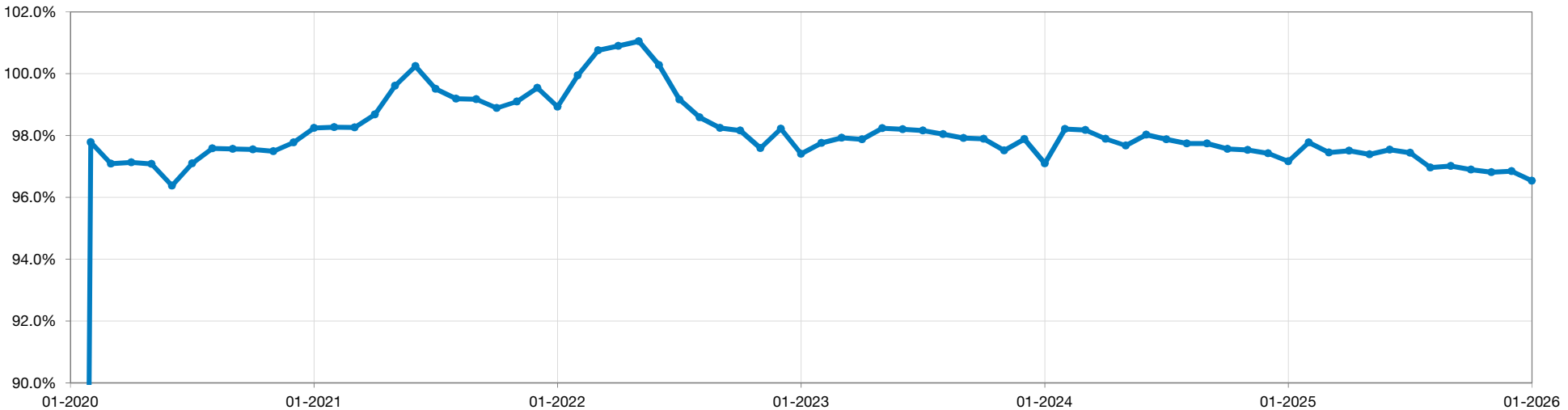
Year to Date



	Pct. of List Price Received	Prior Year	Percent Change
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%
December 2025	96.9%	97.4%	-0.5%
January 2026	96.5%	97.2%	-0.7%
12-Month Avg*	97.2%	97.8%	-0.6%

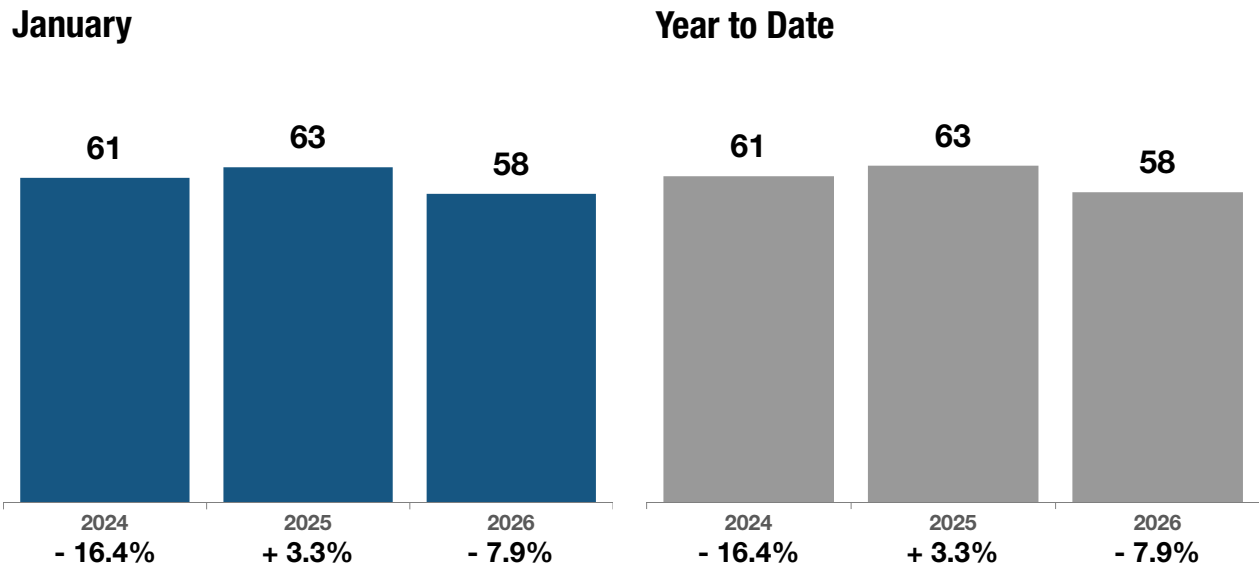
* Average Pct. of List Price Received for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month



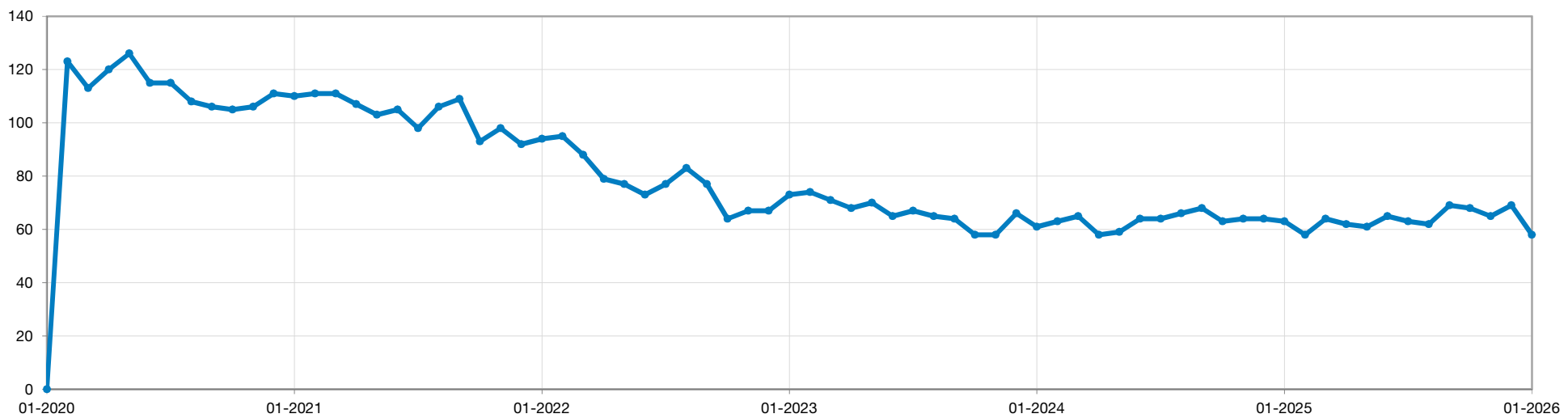
Housing Affordability Index

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.



	Affordability Index	Prior Year	Percent Change
February 2025	58	63	-7.9%
March 2025	64	65	-1.5%
April 2025	62	58	+6.9%
May 2025	61	59	+3.4%
June 2025	65	64	+1.6%
July 2025	63	64	-1.6%
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%
12-Month Avg	64	63	+0.4%

Historical Housing Affordability Index by Month

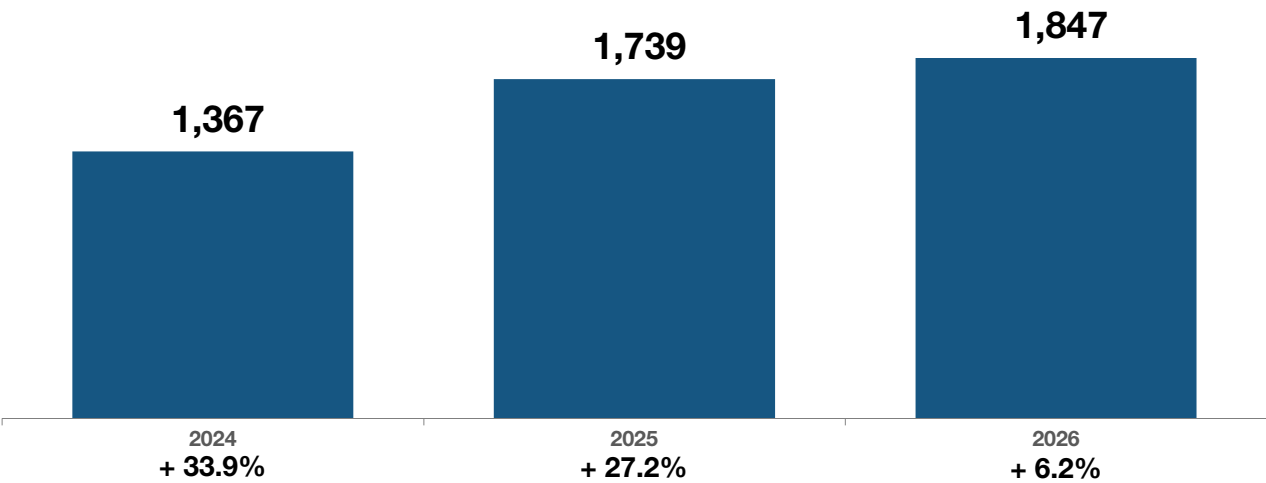


Inventory of Homes for Sale

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



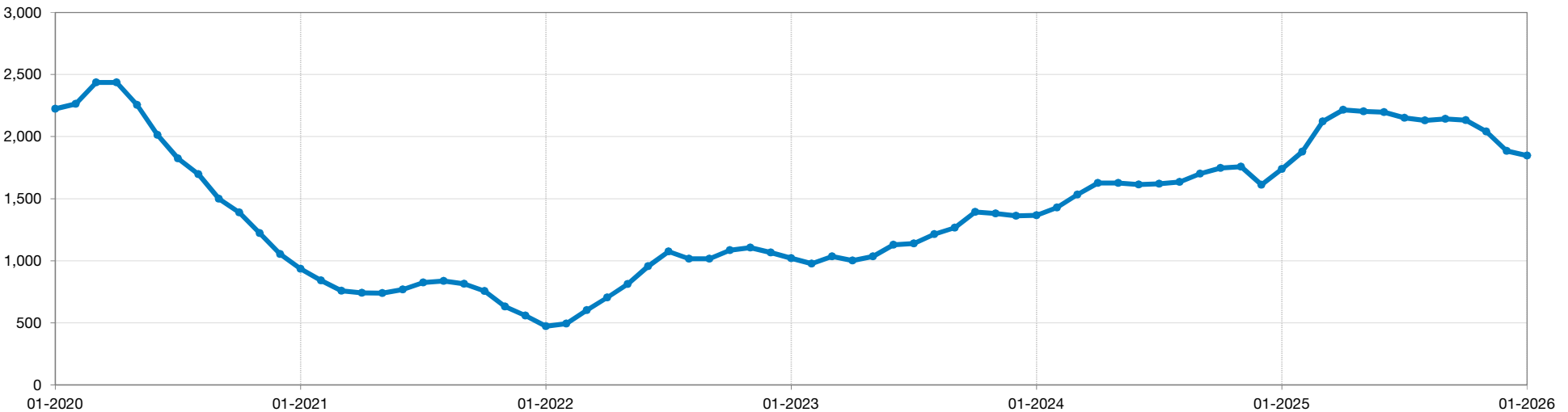
January



Homes for Sale		Prior Year	Percent Change
February 2025	1,879	1,429	+31.5%
March 2025	2,121	1,533	+38.4%
April 2025	2,215	1,626	+36.2%
May 2025	2,202	1,627	+35.3%
June 2025	2,196	1,614	+36.1%
July 2025	2,151	1,619	+32.9%
August 2025	2,130	1,634	+30.4%
September 2025	2,142	1,701	+25.9%
October 2025	2,132	1,746	+22.1%
November 2025	2,040	1,758	+16.0%
December 2025	1,884	1,612	+16.9%
January 2026	1,847	1,739	+6.2%
12-Month Avg*	2,078	1,637	+26.9%

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

Historical Inventory of Homes for Sale by Month

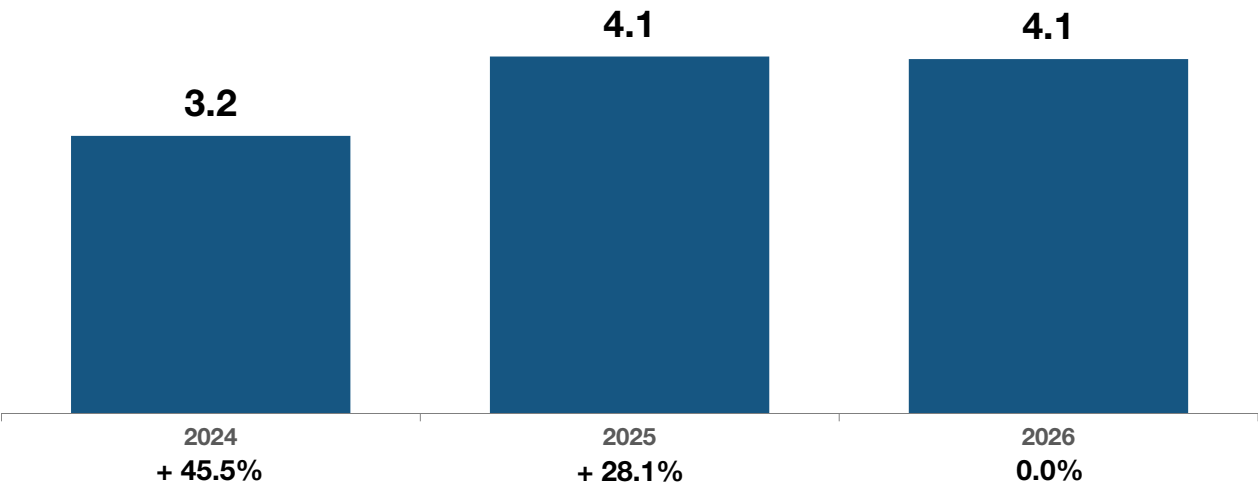


Months Supply of Inventory

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.



January



Months Supply		Prior Year	Percent Change
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	4.7	4.1	+14.6%
November 2025	4.5	4.2	+7.1%
December 2025	4.2	3.8	+10.5%
January 2026	4.1	4.1	0.0%
12-Month Avg*	4.8	3.9	+23.1%

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

Historical Months Supply of Inventory by Month

