

Monthly Indicators



April 2026

U.S. existing-home sales fell 3.6% month-over-month and 1.0% year-over-year to a seasonally adjusted annual rate of 3.98 million, according to the National Association of REALTORS® (NAR), as tight supply and ongoing affordability challenges constrained activity. Sales declined month-over-month in all four regions. Year-over-year, sales increased in the South and West but fell in the Midwest and Northeast.

New Listings were up 0.8 percent to 720. Pending Sales increased 12.6 percent to 545. Inventory shrank 4.6 percent to 2,115 units.

Median Sales Price was up 4.6 percent to \$580,800. Days on Market increased 89.9 percent to 131 days. Months Supply of Inventory was down 13.2 percent to 4.6 months.

Nationally, the median existing-home price rose 1.4% from a year earlier to \$408,800, marking the 33rd consecutive month of year-over-year price increases as limited inventory continued to put upward pressure on prices, NAR said. There were 1.36 million homes for sale heading into April, up 2.3% from a year earlier, representing a 4.1-month supply at the current sales pace.

Quick Facts

+ 12.6%	+ 4.6%	- 13.2%
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.

Market Overview	2
New Listings	3
Pending Sales	4
Closed Sales	5
Days on Market Until Sale	6
Median Sales Price	7
Average Sales Price	8
Percent of List Price Received	9
Housing Affordability Index	10
Inventory of Homes for Sale	11
Months Supply of Inventory	12

Market Overview

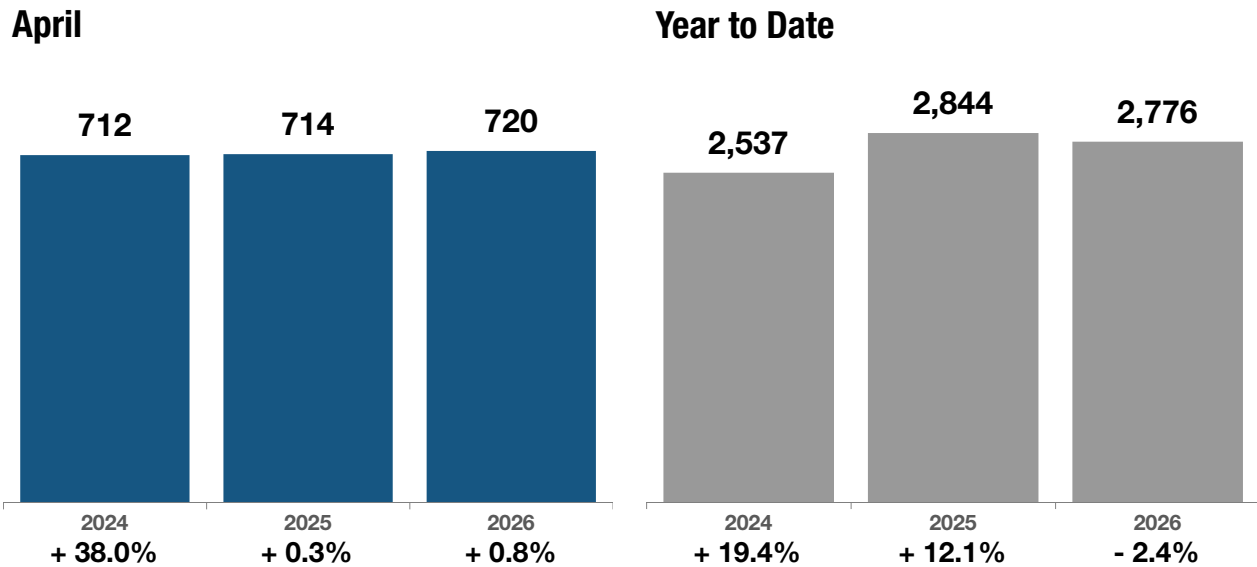
Key market metrics for the current month and year-to-date figures.



Key Metrics	Historical Sparkbars	04-2025	04-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		714	720	+ 0.8%	2,844	2,776	- 2.4%
Pending Sales		484	545	+ 12.6%	1,823	2,001	+ 9.8%
Closed Sales		444	500	+ 12.6%	1,645	1,661	+ 1.0%
Days on Market		69	131	+ 89.9%	68	137	+ 101.5%
Median Sales Price		\$555,000	\$580,800	+ 4.6%	\$560,000	\$570,000	+ 1.8%
Average Sales Price		\$805,061	\$815,259	+ 1.3%	\$835,840	\$858,909	+ 2.8%
Pct. of List Price Received		97.5%	97.4%	- 0.1%	97.5%	96.9%	- 0.6%
Housing Affordability Index		62	61	- 1.6%	62	62	0.0%
Inventory of Homes for Sale		2,216	2,115	- 4.6%	--	--	--
Months Supply of Inventory		5.3	4.6	- 13.2%	--	--	--

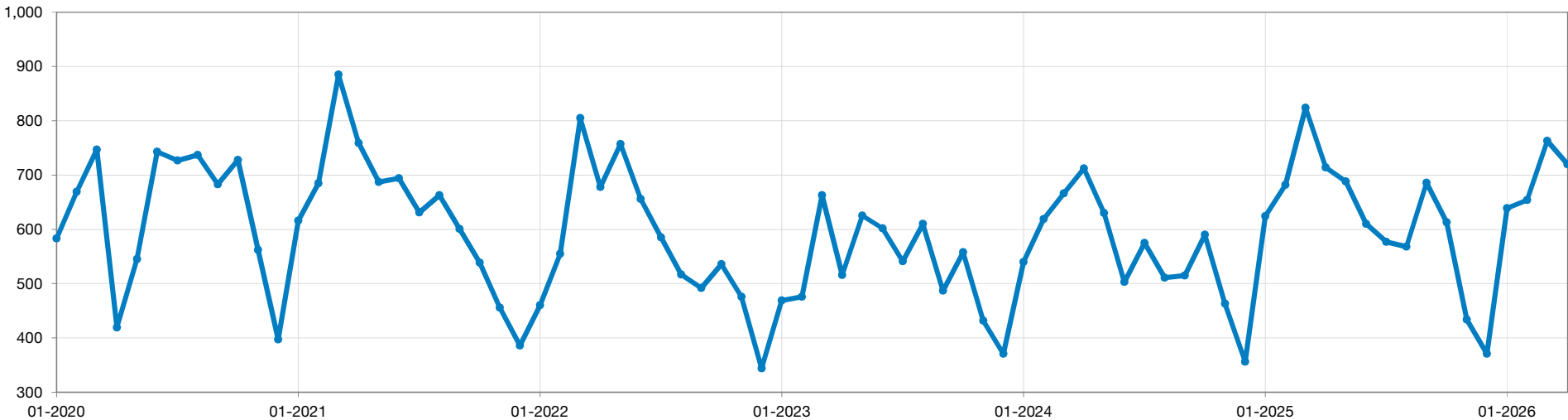
New Listings

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



New Listings		Prior Year	Percent Change
May 2025	688	630	+9.2%
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	613	590	+3.9%
November 2025	434	463	-6.3%
December 2025	371	356	+4.2%
January 2026	639	624	+2.4%
February 2026	654	682	-4.1%
March 2026	763	824	-7.4%
April 2026	720	714	+0.8%
12-Month Avg	610	582	+4.8%

Historical New Listings by Month

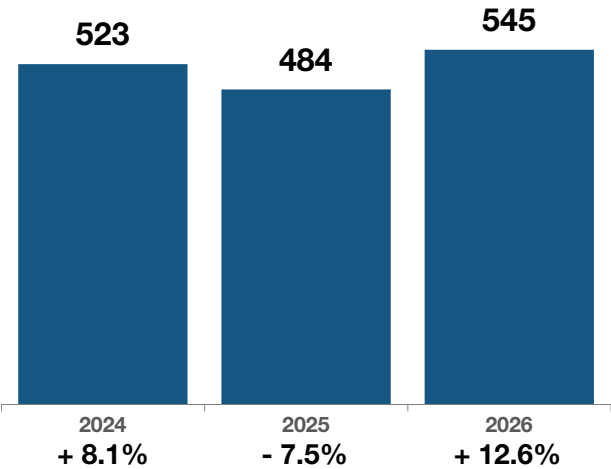


Pending Sales

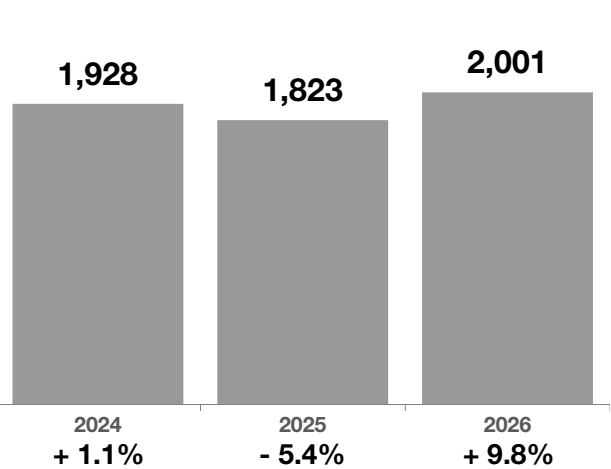
A count of the properties on which offers have been accepted in a given month.



April

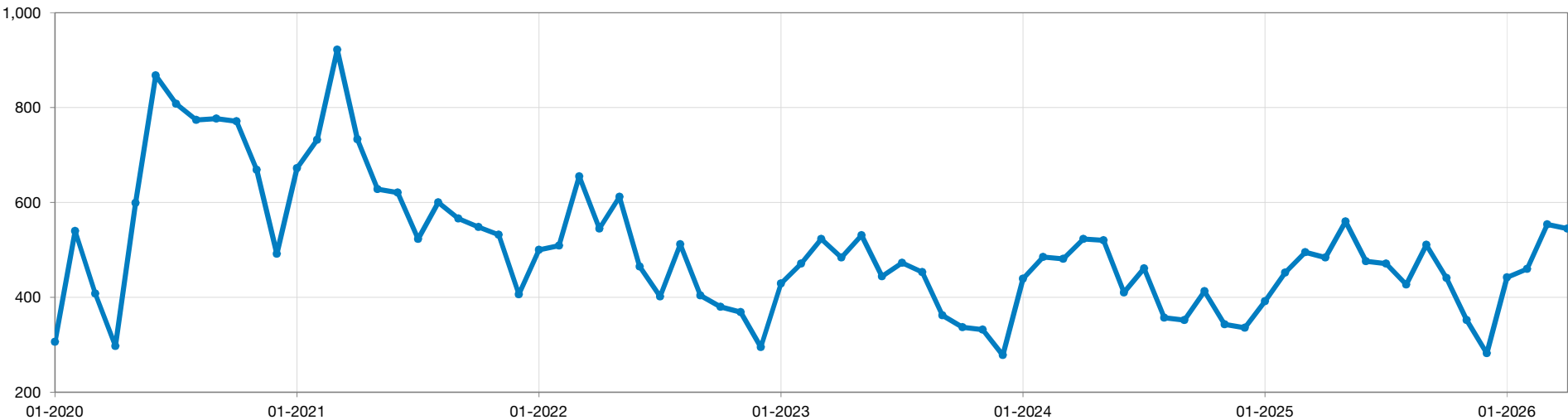


Year to Date



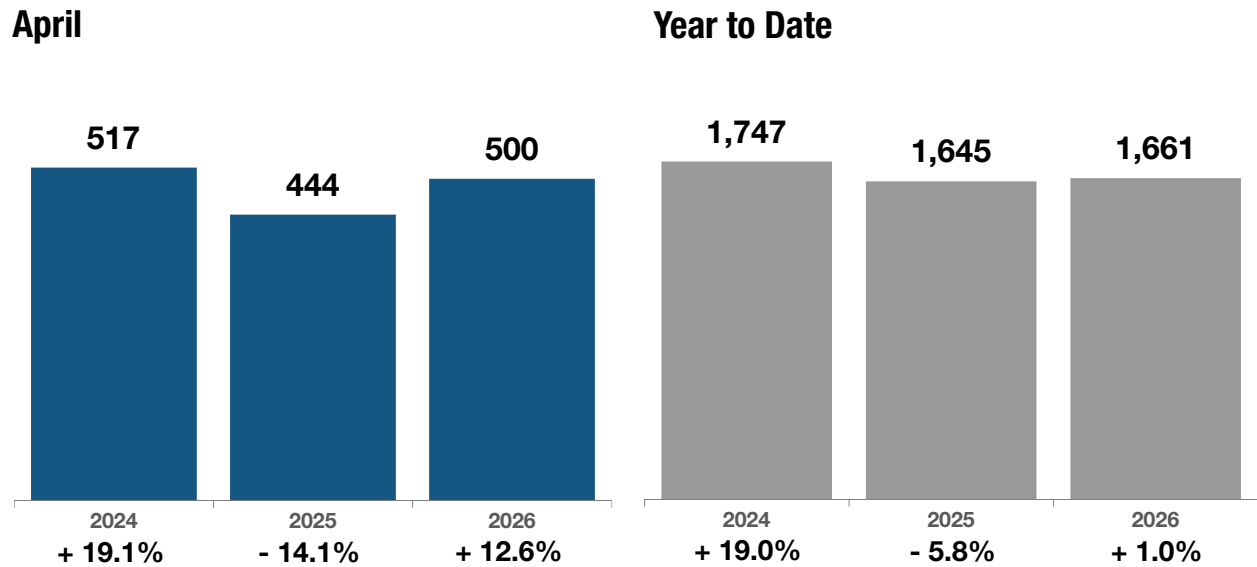
Pending Sales		Prior Year	Percent Change
May 2025	560	520	+7.7%
June 2025	476	410	+16.1%
July 2025	471	461	+2.2%
August 2025	427	357	+19.6%
September 2025	511	352	+45.2%
October 2025	441	413	+6.8%
November 2025	352	343	+2.6%
December 2025	282	336	-16.1%
January 2026	442	392	+12.8%
February 2026	460	452	+1.8%
March 2026	554	495	+11.9%
April 2026	545	484	+12.6%
12-Month Avg	460	418	+10.1%

Historical Pending Sales by Month



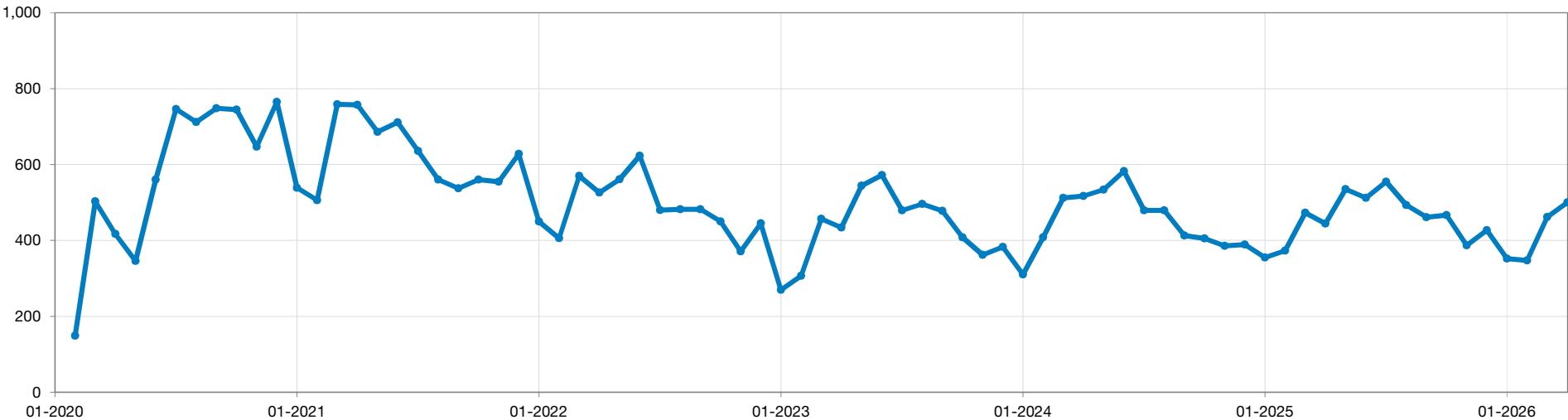
Closed Sales

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



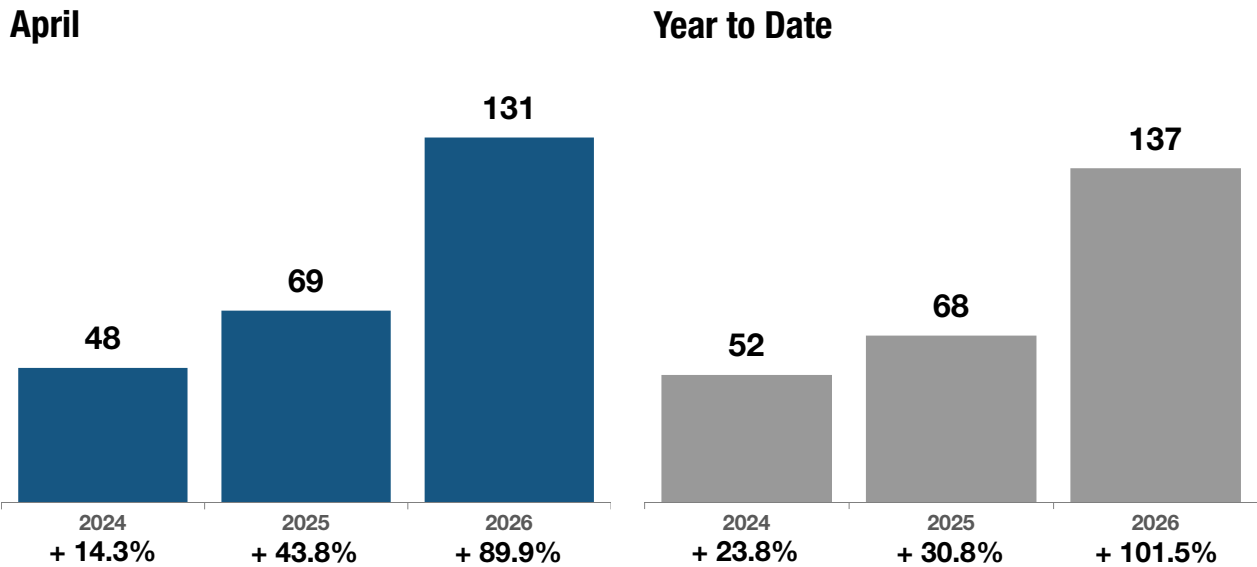
Closed Sales		Prior Year	Percent Change
May 2025	535	534	+0.2%
June 2025	512	583	-12.2%
July 2025	555	479	+15.9%
August 2025	493	479	+2.9%
September 2025	461	413	+11.6%
October 2025	467	405	+15.3%
November 2025	387	386	+0.3%
December 2025	427	389	+9.8%
January 2026	352	355	-0.8%
February 2026	347	373	-7.0%
March 2026	462	473	-2.3%
April 2026	500	444	+12.6%
12-Month Avg	458	443	+3.5%

Historical Closed Sales by Month



Days on Market Until Sale

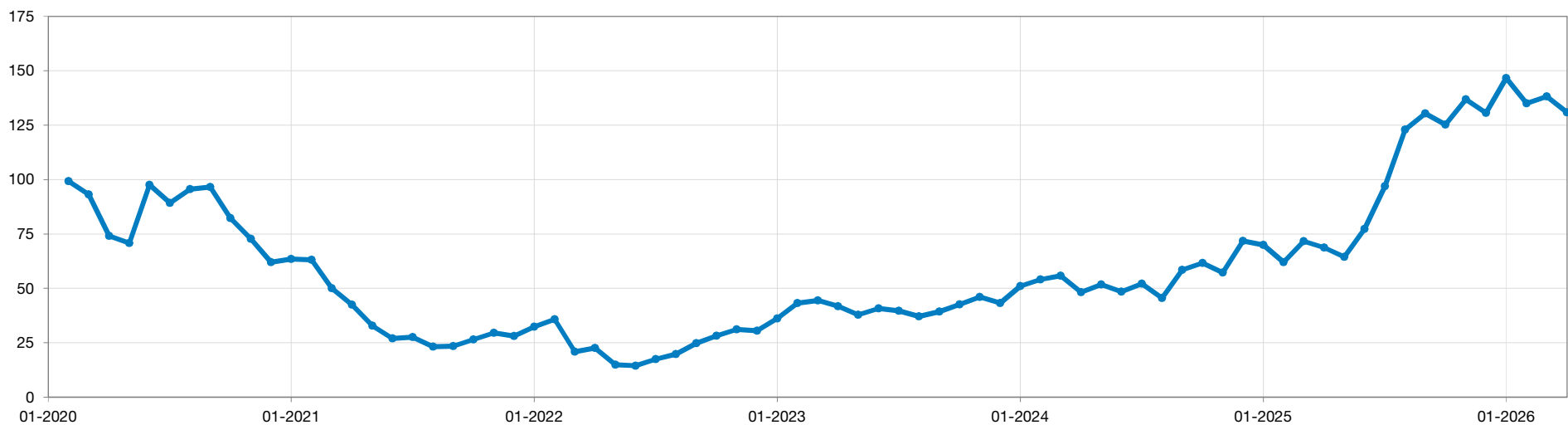
Average number of days between when a property is listed and when an offer is accepted in a given month.



Days on Market		Prior Year	Percent Change
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	62	+101.6%
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	138	72	+91.7%
April 2026	131	69	+89.9%
12-Month Avg*	117	59	+98.3%

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

Historical Days on Market Until Sale by Month

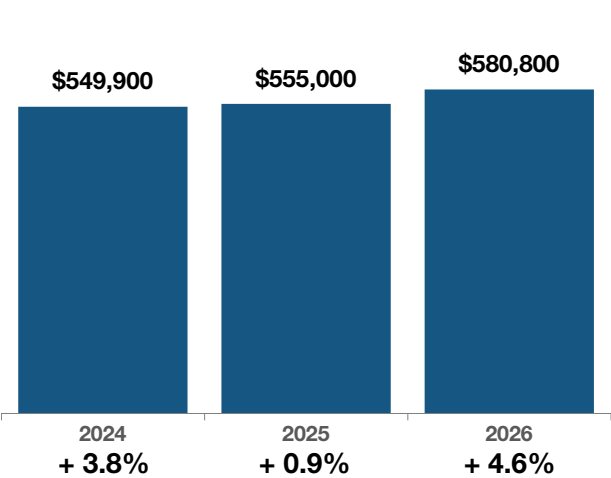


Median Sales Price

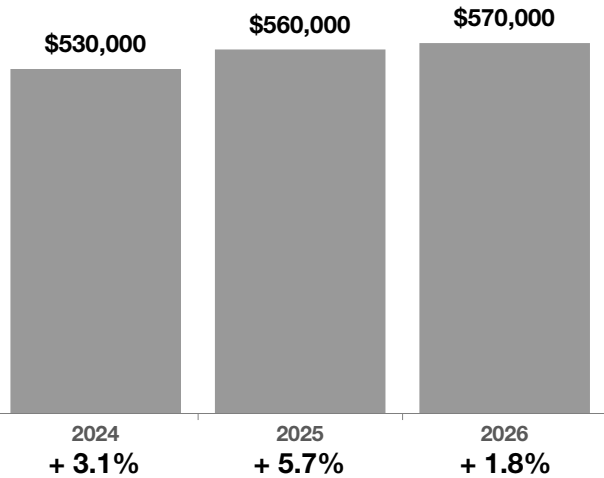
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



April



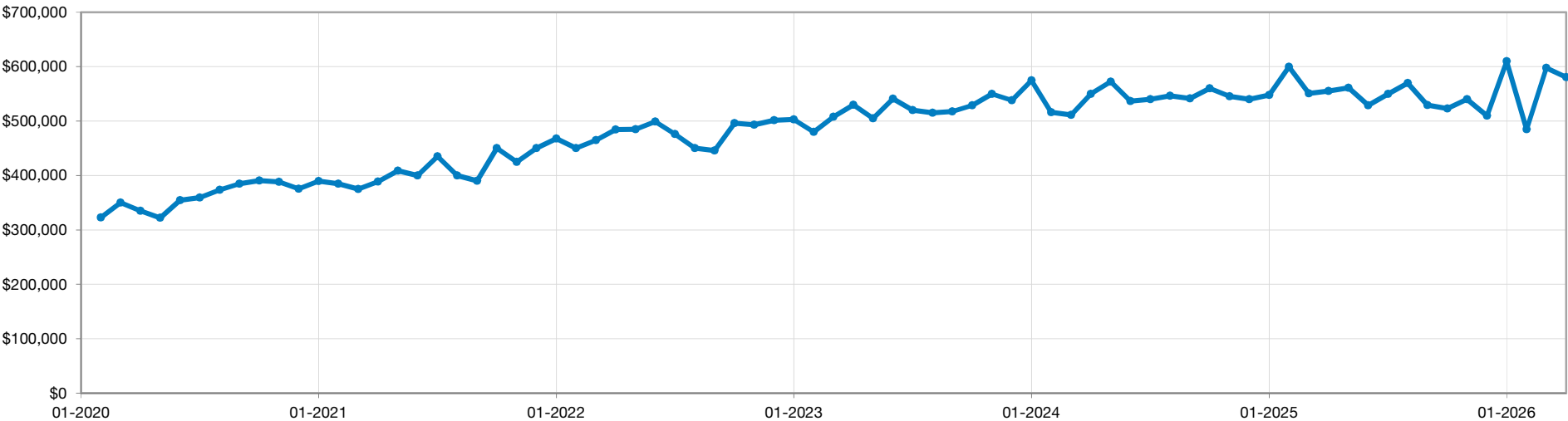
Year to Date



Median Sales Price		Prior Year	Percent Change
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	\$529,165	\$541,500	-2.3%
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	\$609,933	\$547,900	+11.3%
February 2026	\$485,000	\$599,725	-19.1%
March 2026	\$597,528	\$550,665	+8.5%
April 2026	\$580,800	\$555,000	+4.6%
12-Month Med*	\$547,750	\$550,000	-0.4%

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

Historical Median Sales Price by Month



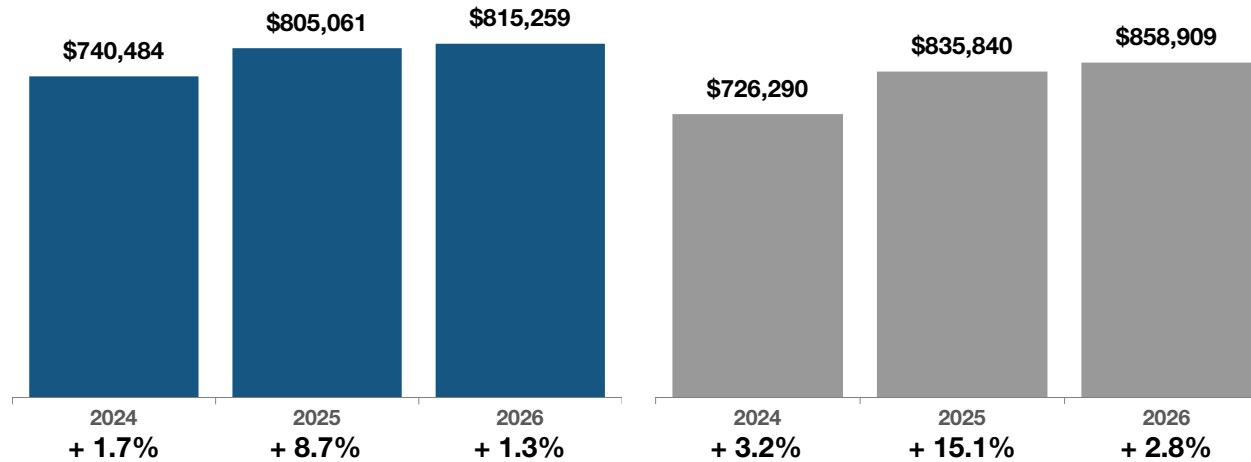
Average Sales Price

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



April

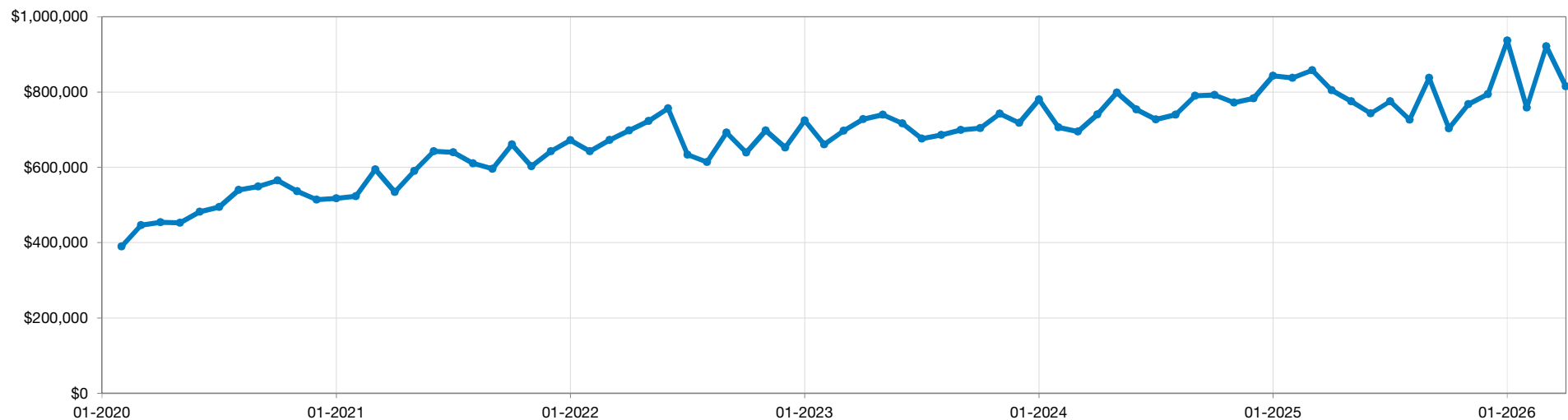
Year to Date



Avg. Sales Price	Prior Year	Percent Change
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	\$837,328	\$790,472 +5.9%
October 2025	\$703,450	\$791,894 -11.2%
November 2025	\$768,034	\$772,131 -0.5%
December 2025	\$794,399	\$783,354 +1.4%
January 2026	\$936,953	\$843,279 +11.1%
February 2026	\$758,984	\$837,616 -9.4%
March 2026	\$921,739	\$857,753 +7.5%
April 2026	\$815,259	\$805,061 +1.3%
12-Month Avg*	\$796,468	\$791,681 +0.6%

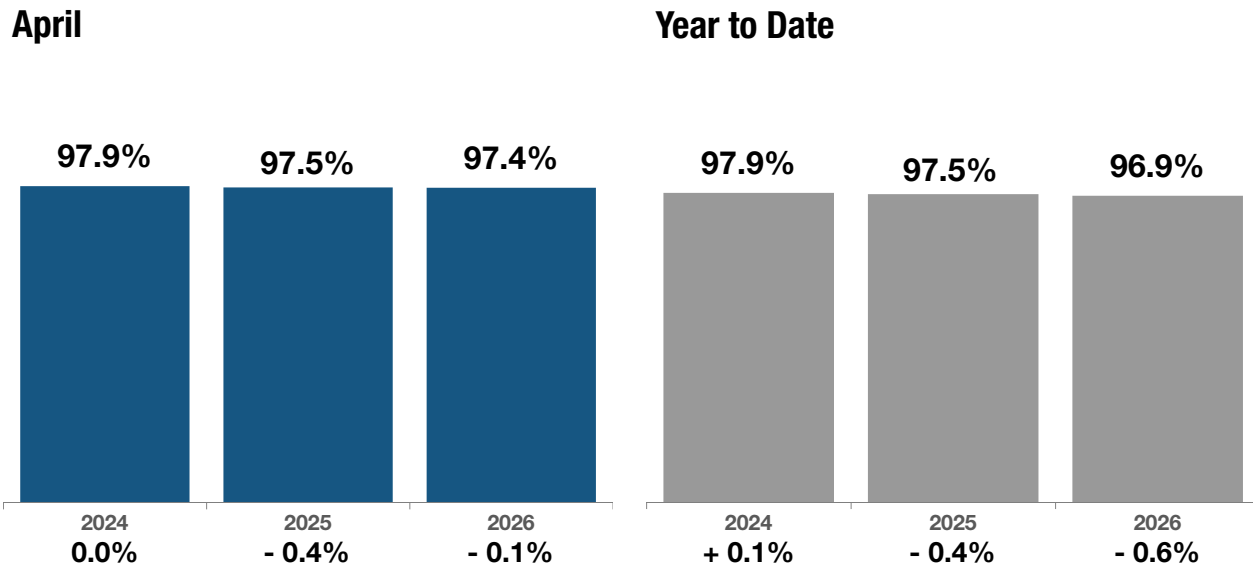
* Avg. Sales Price of all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Average Sales Price by Month



Percent of List Price Received

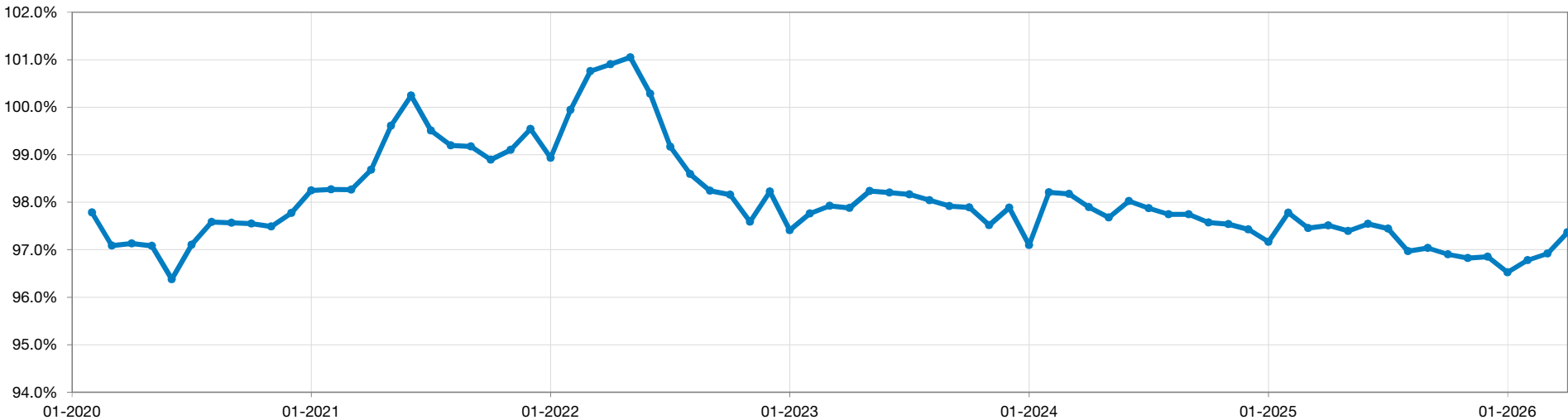
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



	Pct. of List Price Received	Prior Year	Percent Change
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%
February 2026	96.8%	97.8%	-1.0%
March 2026	96.9%	97.5%	-0.6%
April 2026	97.4%	97.5%	-0.1%
12-Month Avg*	97.1%	97.6%	-0.5%

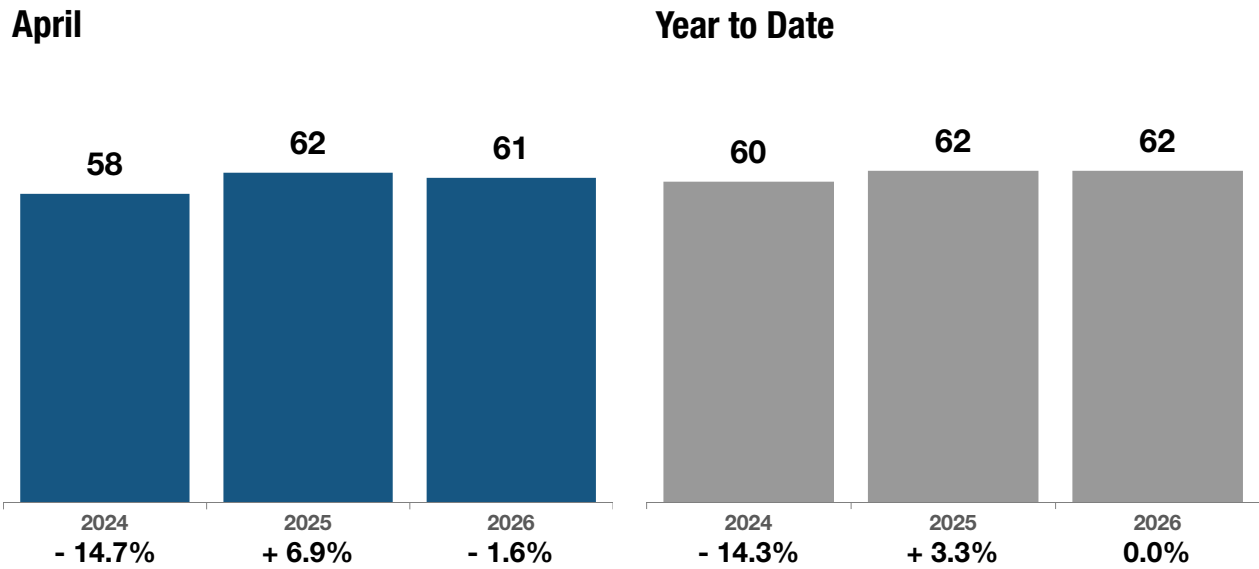
* Average Pct. of List Price Received for all properties from May 2025 through April 2026. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month



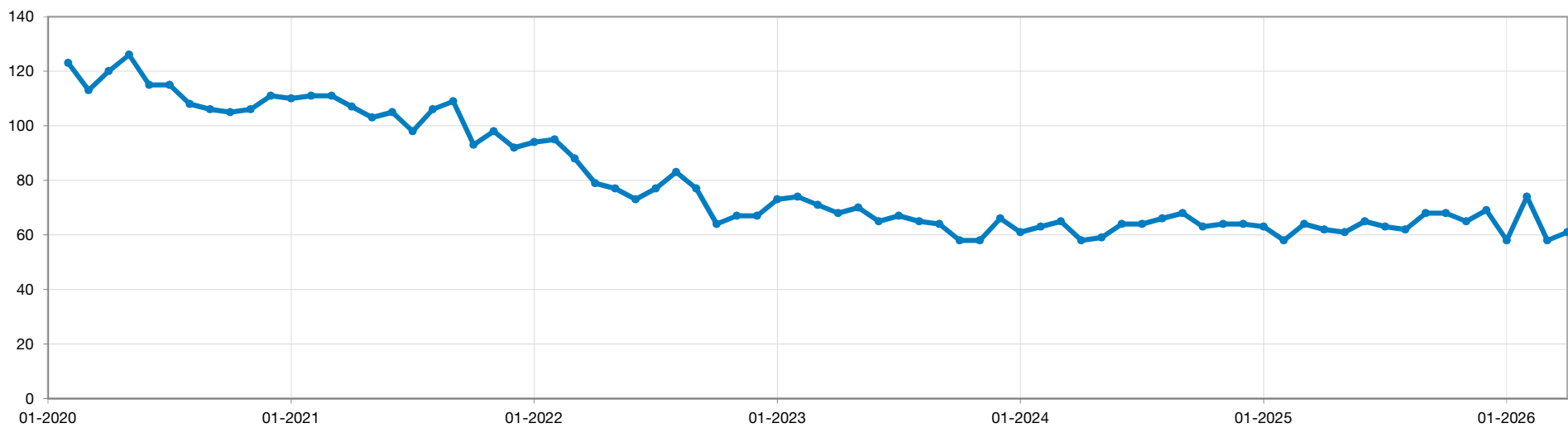
Housing Affordability Index

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
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	68	68	0.0%
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%
12-Month Avg	64	63	+1.7%

Historical Housing Affordability Index by Month

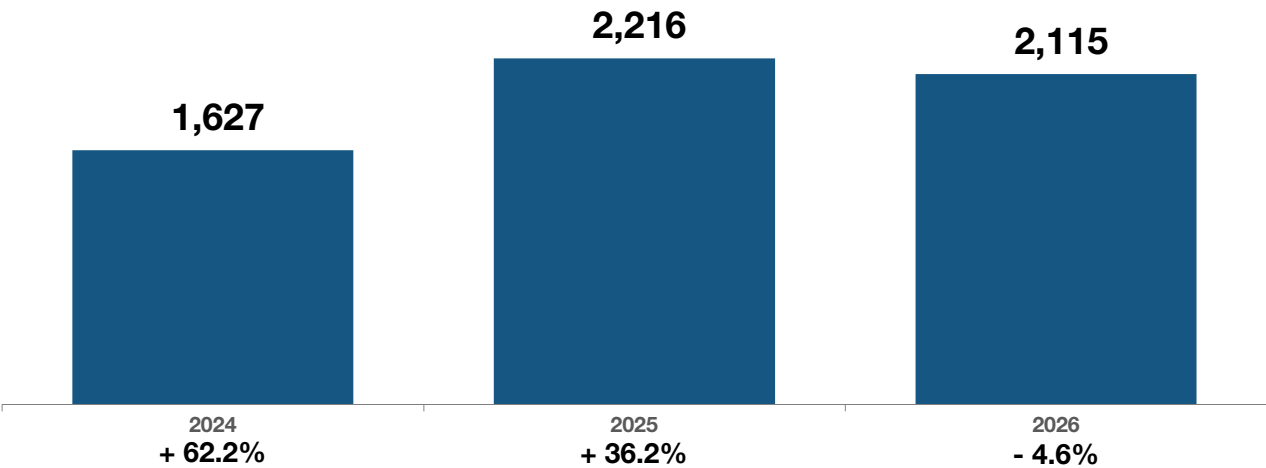


Inventory of Homes for Sale

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



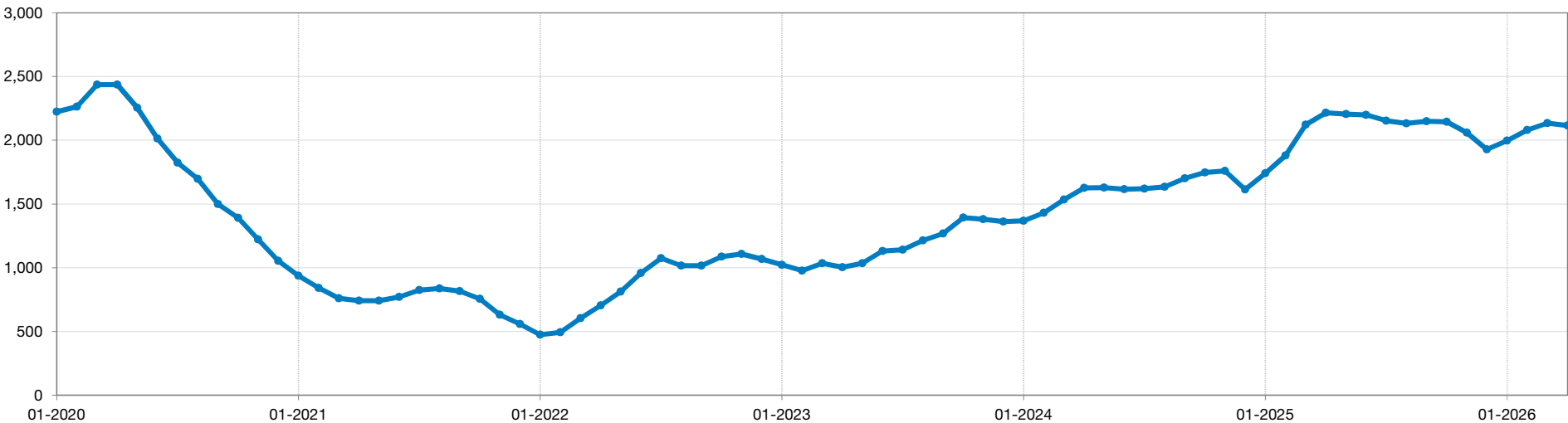
April



Homes for Sale		Prior Year	Percent Change
May 2025	2,204	1,628	+35.4%
June 2025	2,198	1,615	+36.1%
July 2025	2,153	1,620	+32.9%
August 2025	2,133	1,635	+30.5%
September 2025	2,149	1,702	+26.3%
October 2025	2,145	1,747	+22.8%
November 2025	2,060	1,759	+17.1%
December 2025	1,929	1,613	+19.6%
January 2026	1,997	1,740	+14.8%
February 2026	2,081	1,880	+10.7%
March 2026	2,135	2,122	+0.6%
April 2026	2,115	2,216	-4.6%
12-Month Avg*	2,108	1,773	+18.9%

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

Historical Inventory of Homes for Sale by Month

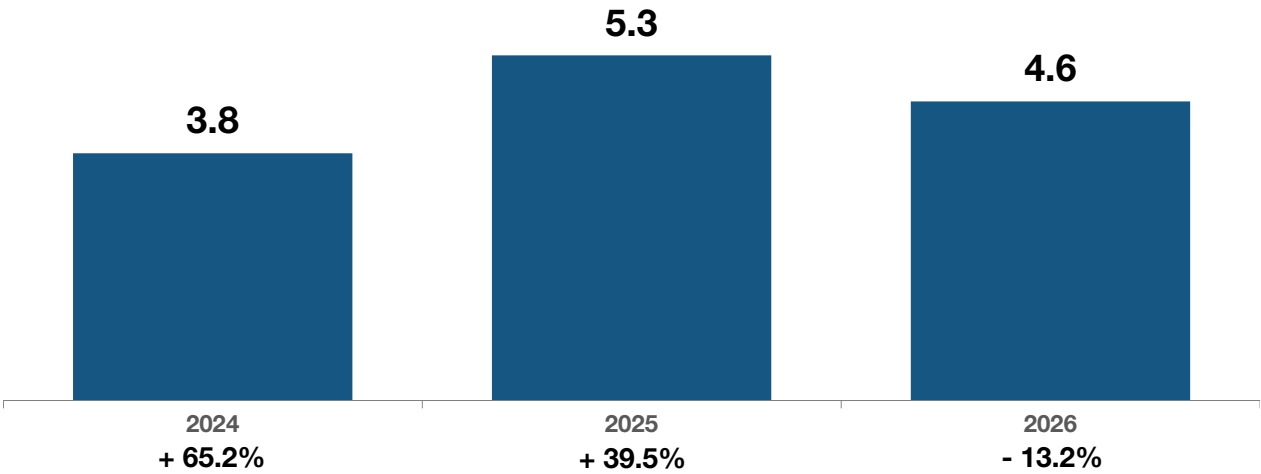


Months Supply of Inventory

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.



April



Months Supply		Prior Year	Percent Change
May 2025	5.2	3.8	+36.8%
June 2025	5.2	3.8	+36.8%
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	4.8	4.2	+14.3%
November 2025	4.6	4.2	+9.5%
December 2025	4.3	3.8	+13.2%
January 2026	4.4	4.1	+7.3%
February 2026	4.6	4.5	+2.2%
March 2026	4.7	5.0	-6.0%
April 2026	4.6	5.3	-13.2%
12-Month Avg*	4.8	4.2	+14.3%

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

Historical Months Supply of Inventory by Month

