Monthly Indicators



October 2025

U.S. existing-home sales climbed 1.5% month-over-month and 4.1% year-over-year, reaching a seasonally adjusted annual rate of 4.06 million units, according to the National Association of REALTORS® (NAR). The increase was partly driven by falling mortgage rates, which recently hit their lowest level in more than a year. Regionally, monthly sales advanced in the Northeast, South, and West, while the Midwest experienced a slight decline.

New Listings decreased 3.1 percent for Single-Family homes but increased 5.1 percent for Condo homes. Pending Sales increased 16.9 percent for Single-Family homes and 19.4 percent for Condo homes. Inventory increased 5.0 percent for Single-Family homes and 7.4 percent for Condo homes.

Median Sales Price decreased 1.1 percent to \$365,000 for Single-Family homes and 7.8 percent to \$235,000 for Condo homes. Days on Market decreased 3.3 percent for Single-Family homes but increased 23.7 percent for Condo homes. Months Supply of Inventory remained flat for Single-Family homes but increased 10.3 percent for Condo properties.

Housing inventory edged up 1.3% from the previous month to 1.55 million units, 14.0% higher than the same period last year. This represents a 4.6-month supply at the current sales pace, according to NAR. The median existing-home price grew 2.1% year-over-year to \$415,200, continuing the trend of annual price gains. The Midwest saw the largest year-over-year increase in median sales price, followed by the Northeast and South, while prices remained mostly flat in the West.

Quick Facts

+ 3.5%	+ 2.4%	+ 6.2%	
Change in	Change in	Change in	
Closed Sales	Closed Sales	Closed Sales	
All Properties	Single-Family Only	Condo Only	

A research tool provided by the Coastal Carolinas Association of REALTORS®. Percent changes are calculated using rounded figures.

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Single Family Market Overview

Key market metrics for the current month and year-to-date figures. Single-family homes only.



Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings	10-2023 4-2024 10-2024 4-2025 10-2025	1,274	1,235	- 3.1%	12,465	13,494	+ 8.3%
Pending Sales	10-2023 4-2024 10-2024 4-2025 10-2025	862	1,008	+ 16.9%	9,431	9,632	+ 2.1%
Closed Sales	10-2023 4-2024 10-2024 4-2025 10-2025	934	956	+ 2.4%	9,121	9,357	+ 2.6%
Days on Market Until Sale	10-2023 4-2024 10-2024 4-2025 10-2025	122	118	- 3.3%	121	123	+ 1.7%
Median Sales Price	10-2023 4-2024 10-2024 4-2025 10-2025	\$369,000	\$365,000	- 1.1%	\$360,000	\$365,000	+ 1.4%
Average Sales Price	10-2023 4-2024 10-2024 4-2025 10-2025	\$426,681	\$443,839	+ 4.0%	\$435,803	\$441,030	+ 1.2%
Percent of List Price Received	10-2023 4-2024 10-2024 4-2025 10-2025	97.7%	97.3%	- 0.4%	97.4%	97.3%	- 0.1%
Housing Affordability Index	10-2023 4-2024 10-2024 4-2025 10-2025	74	77	+ 4.1%	76	77	+ 1.3%
Inventory of Homes for Sale	10-2023 4-2024 10-2024 4-2025 10-2025	3,528	3,703	+ 5.0%	_	_	_
Months Supply of Inventory	10-2023 4-2024 10-2024 4-2025 10-2025	4.0	4.0	0.0%	_		_

Condo Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Condo properties only.

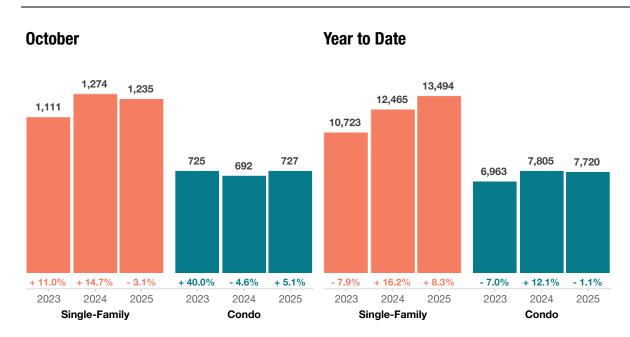


Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings	10-2023 4-2024 10-2024 4-2025 10-2025	692	727	+ 5.1%	7,805	7,720	- 1.1%
Pending Sales	10-2023 4-2024 10-2024 4-2025 10-2025	387	462	+ 19.4%	4,451	4,322	- 2.9%
Closed Sales	10-2023 4-2024 10-2024 4-2025 10-2025	419	445	+ 6.2%	4,377	4,138	- 5.5%
Days on Market Until Sale	10-2023 4-2024 10-2024 4-2025 10-2025	114	141	+ 23.7%	109	132	+ 21.1%
Median Sales Price	10-2023 4-2024 10-2024 4-2025 10-2025	\$254,990	\$235,000	- 7.8%	\$248,000	\$238,000	- 4.0%
Average Sales Price	10-2023 4-2024 10-2024 4-2025 10-2025	\$298,019	\$263,940	- 11.4%	\$286,596	\$271,641	- 5.2%
Percent of List Price Received	10-2023 4-2024 10-2024 4-2025 10-2025	96.6%	95.8%	- 0.8%	96.6%	96.1%	- 0.5%
Housing Affordability Index	10-2023 4-2024 10-2024 4-2025 10-2025	107	120	+ 12.1%	110	119	+ 8.2%
Inventory of Homes for Sale	10-2023 4-2024 10-2024 4-2025 10-2025	2,896	3,109	+ 7.4%	_	_	_
Months Supply of Inventory	10-2023 4-2024 10-2024 4-2025 10-2025	6.8	7.5	+ 10.3%	_	_	_

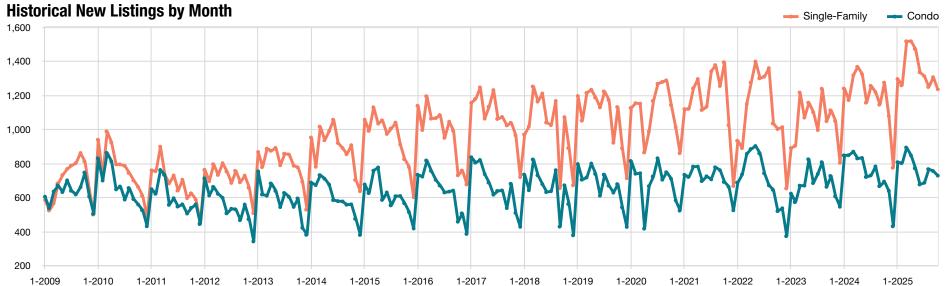
New Listings

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





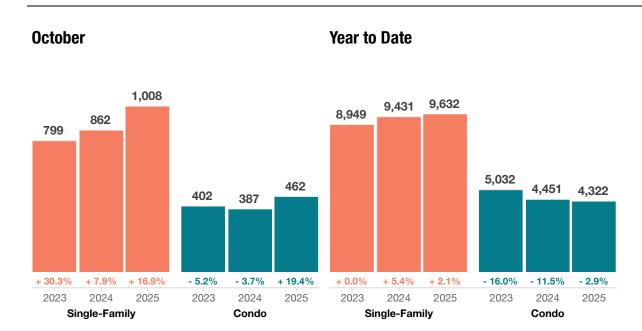
New Listings	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	1,077	+ 2.8%	637	+ 5.3%
Dec-2024	773	- 3.6%	429	- 21.1%
Jan-2025	1,295	+ 4.5%	806	- 4.7%
Feb-2025	1,258	+ 7.4%	800	- 5.5%
Mar-2025	1,517	+ 15.2%	892	+ 2.8%
Apr-2025	1,517	+ 11.0%	846	+ 2.2%
May-2025	1,472	+ 11.2%	770	- 7.3%
Jun-2025	1,335	+ 15.5%	675	- 6.1%
Jul-2025	1,311	+ 4.5%	685	- 5.9%
Aug-2025	1,248	+ 2.5%	765	- 2.0%
Sep-2025	1,306	+ 14.2%	754	+ 13.4%
Oct-2025	1,235	- 3.1%	727	+ 5.1%
12-Month Avg	1,279	+ 7.2%	732	- 1.9%



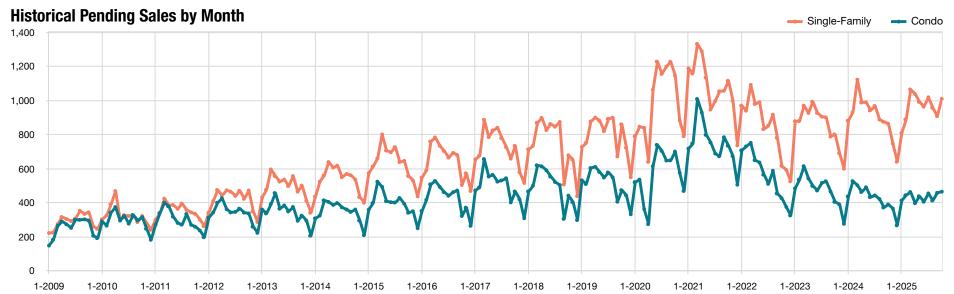
Pending Sales

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





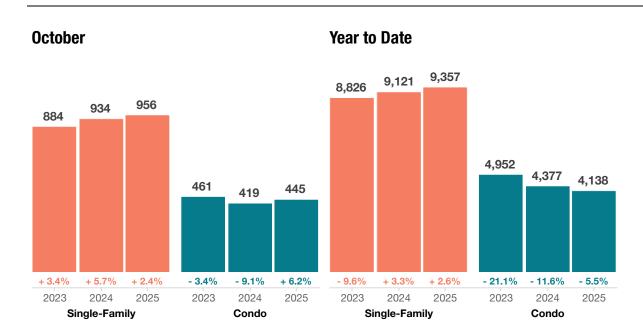
Pending Sales	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	744	+ 8.1%	363	- 6.4%
Dec-2024	638	+ 6.9%	264	- 3.3%
Jan-2025	807	- 8.3%	410	- 5.5%
Feb-2025	887	- 4.5%	441	- 15.8%
Mar-2025	1,063	- 5.2%	460	- 8.0%
Apr-2025	1,037	+ 5.2%	394	- 14.3%
May-2025	990	+ 0.2%	435	- 10.9%
Jun-2025	962	+ 2.3%	403	- 6.3%
Jul-2025	1,017	+ 5.3%	452	+ 2.7%
Aug-2025	955	+ 7.8%	410	- 2.1%
Sep-2025	906	+ 3.8%	455	+ 23.3%
Oct-2025	1,008	+ 16.9%	462	+ 19.4%
12-Month Avg	918	+ 2.8%	412	- 3.3%



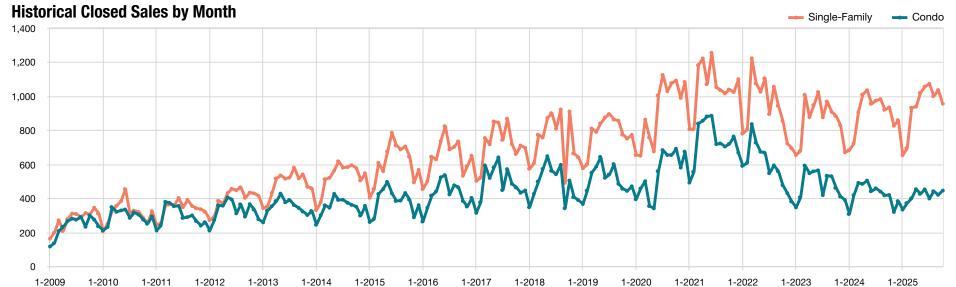
Closed Sales

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





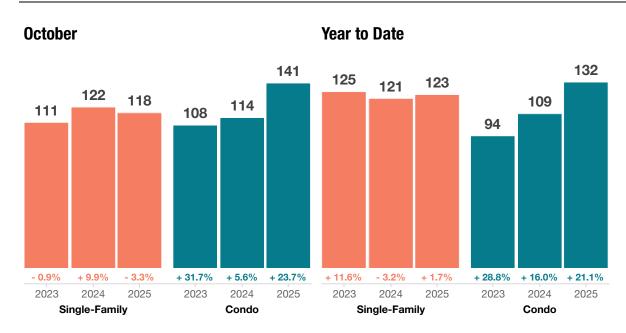
Closed Sales	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	826	- 0.4%	319	- 22.2%
Dec-2024	859	+ 28.2%	383	- 1.8%
Jan-2025	653	- 4.3%	333	+ 8.5%
Feb-2025	694	- 4.0%	371	- 11.2%
Mar-2025	932	+ 3.0%	399	- 18.6%
Apr-2025	938	- 7.1%	453	- 6.4%
May-2025	1,019	- 1.5%	426	- 15.5%
Jun-2025	1,056	+ 10.6%	452	+ 2.5%
Jul-2025	1,073	+ 10.2%	398	- 13.1%
Aug-2025	1,000	+ 1.7%	441	+ 0.5%
Sep-2025	1,036	+ 12.6%	420	+ 0.7%
Oct-2025	956	+ 2.4%	445	+ 6.2%
12-Month Avg	920	+ 4.0%	403	- 6.5%



Days on Market Until Sale

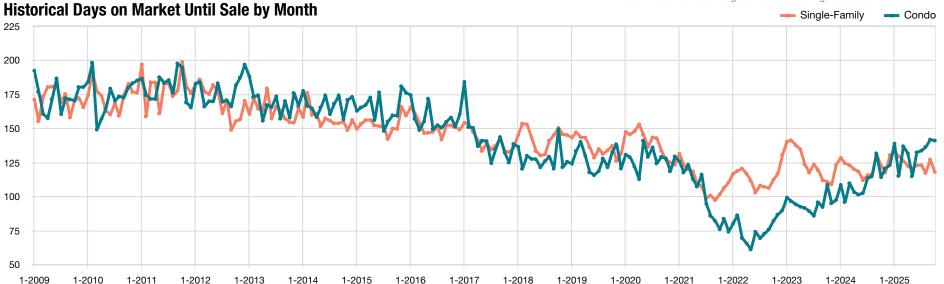
Average number of days between when a property is listed and when an offer is accepted in a given month.





Days on Market	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	117	+ 7.3%	121	+ 27.4%
Dec-2024	130	+ 5.7%	123	+ 26.8%
Jan-2025	132	+ 3.1%	139	+ 28.7%
Feb-2025	129	+ 4.0%	115	+ 19.8%
Mar-2025	126	+ 2.4%	137	+ 24.5%
Apr-2025	122	+ 1.7%	131	+ 27.2%
May-2025	120	+ 1.7%	115	+ 13.9%
Jun-2025	123	+ 9.8%	132	+ 29.4%
Jul-2025	123	+ 7.0%	133	+ 17.7%
Aug-2025	117	+ 0.9%	136	+ 19.3%
Sep-2025	127	- 3.1%	142	+ 8.4%
Oct-2025	118	- 3.3%	141	+ 23.7%
12-Month Avg*	123	+ 3.0%	131	+ 22.0%

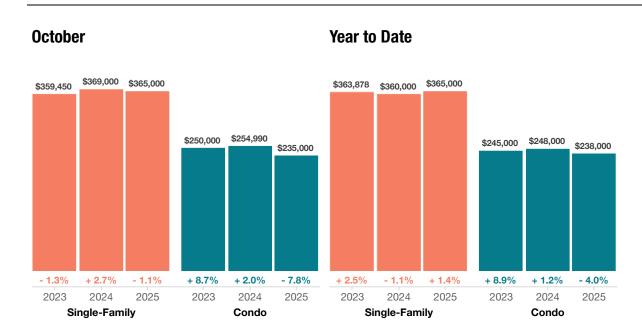
^{*} Days on Market for all properties from November 2024 through October 2025. This is not the average of the individual figures above.



Median Sales Price

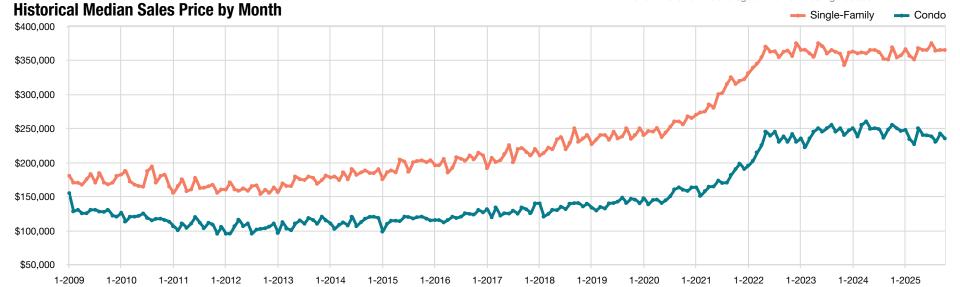
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.





Median Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	\$354,096	+ 3.3%	\$249,900	+ 4.1%
Dec-2024	\$357,000	- 1.1%	\$245,985	- 0.4%
Jan-2025	\$366,200	+ 0.9%	\$247,500	- 1.0%
Feb-2025	\$356,350	- 1.0%	\$234,000	- 1.6%
Mar-2025	\$351,000	- 2.9%	\$226,500	- 11.2%
Apr-2025	\$367,850	+ 2.2%	\$249,999	- 3.8%
May-2025	\$365,000	0.0%	\$240,000	- 3.6%
Jun-2025	\$365,000	0.0%	\$239,500	- 4.2%
Jul-2025	\$375,000	+ 3.6%	\$238,000	- 4.3%
Aug-2025	\$363,950	+ 3.4%	\$230,000	- 2.5%
Sep-2025	\$365,000	+ 4.0%	\$242,250	- 2.3%
Oct-2025	\$365,000	- 1.1%	\$235,000	- 7.8%
12-Month Avg*	\$363,000	+ 0.8%	\$240,000	- 2.7%

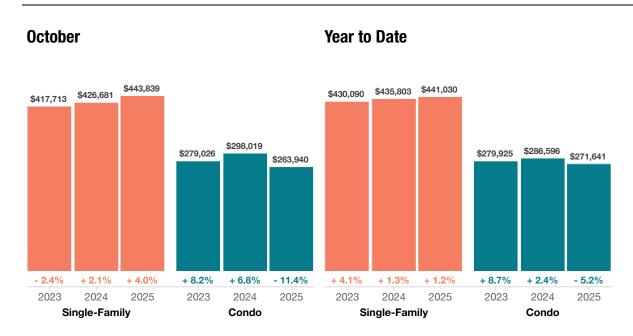
^{*} Median Sales Price for all properties from November 2024 through October 2025. This is not the average of the individual figures above.



Average Sales Price

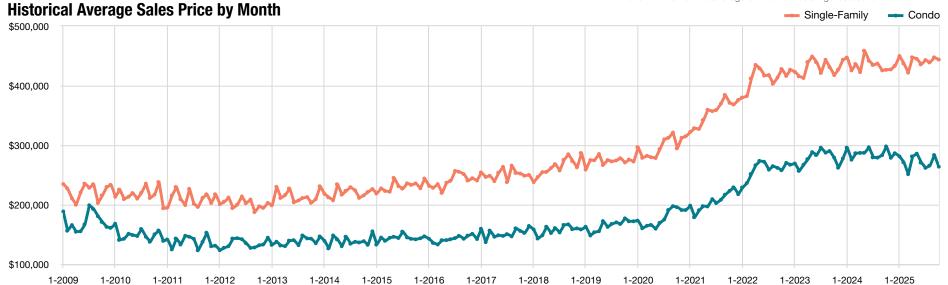
Average sales price for all closed sales, not accounting for seller concessions, in a given month.





Avg. Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	\$427,300	+ 0.1%	\$278,804	+ 6.4%
Dec-2024	\$433,401	- 2.3%	\$286,484	+ 3.2%
Jan-2025	\$449,919	+ 0.6%	\$281,284	- 4.9%
Feb-2025	\$437,373	+ 2.7%	\$271,421	- 1.5%
Mar-2025	\$421,908	- 3.3%	\$251,284	- 12.3%
Apr-2025	\$447,711	+ 5.9%	\$281,183	- 2.0%
May-2025	\$445,112	- 3.0%	\$285,778	- 0.5%
Jun-2025	\$435,702	- 1.4%	\$270,796	- 8.7%
Jul-2025	\$443,064	+ 1.9%	\$261,960	- 6.3%
Aug-2025	\$439,023	+ 0.4%	\$265,580	- 4.8%
Sep-2025	\$447,665	+ 5.2%	\$283,504	+ 0.1%
Oct-2025	\$443,839	+ 4.0%	\$263,940	- 11.4%
12-Month Avg*	\$439,409	+ 0.9%	\$273,288	- 3.8%

^{*} Avg. Sales Price for all properties from November 2024 through October 2025. This is not the average of the individual figures above.



Percent of List Price Received

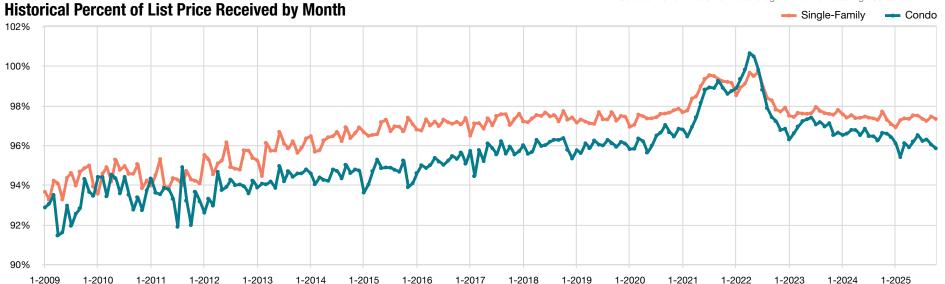
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



October Year to Date											
97.6%	97.7%	97.3%	97.1%	96.6%	95.8%	97.6%	97.4%	97.3%	97.0%	96.6%	96.1%
- 0.2%	+ 0.1%	- 0.4%	- 0.1%	- 0.5%	- 0.8%	- 1.3%	- 0.2%	- 0.1%	- 2.2%	- 0.4%	- 0.5%
2023	2024	2025	2023	2024	2025	2023	2024	2025	2023	2024	2025
Si	ngle-Fam	ily		Condo		Si	ngle-Fam	ily		Condo	

Pct. of List Price Received	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	97.3%	- 0.2%	96.6%	+ 0.1%
Dec-2024	97.1%	- 0.7%	96.4%	- 0.2%
Jan-2025	96.9%	- 0.7%	96.1%	- 0.4%
Feb-2025	97.3%	- 0.1%	95.4%	- 1.2%
Mar-2025	97.4%	- 0.1%	96.1%	- 0.7%
Apr-2025	97.3%	- 0.1%	95.9%	- 0.9%
May-2025	97.5%	+ 0.1%	96.2%	- 0.3%
Jun-2025	97.5%	+ 0.1%	96.5%	- 0.3%
Jul-2025	97.3%	- 0.1%	96.2%	- 0.3%
Aug-2025	97.2%	- 0.1%	96.3%	- 0.1%
Sep-2025	97.4%	+ 0.1%	96.0%	- 0.2%
Oct-2025	97.3%	- 0.4%	95.8%	- 0.8%
12-Month Avg*	97.3%	- 0.2%	96.1%	- 0.5%

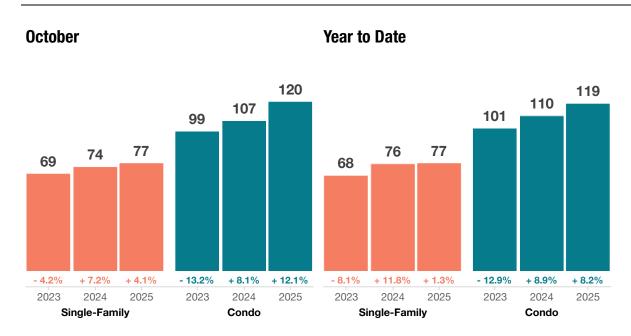
^{*} Pct. of List Price Received for all properties from November 2024 through October 2025. This is not the average of the individual figures above.



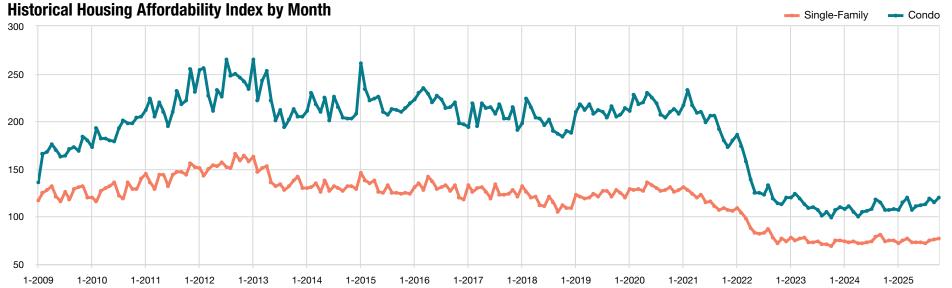
Housing Affordability Index

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.





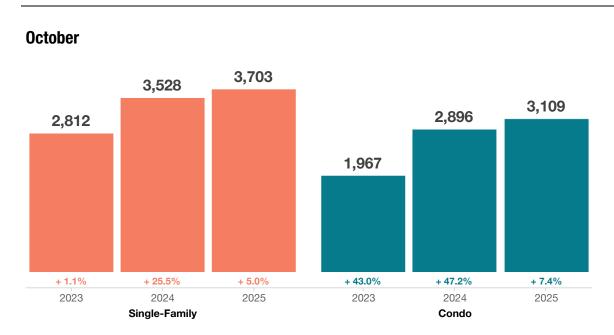
Affordability Index	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	75	0.0%	107	0.0%
Dec-2024	75	0.0%	108	- 1.8%
Jan-2025	72	- 2.7%	107	- 0.9%
Feb-2025	75	+ 2.7%	115	+ 3.6%
Mar-2025	77	+ 4.1%	120	+ 14.3%
Apr-2025	73	+ 1.4%	107	+ 7.0%
May-2025	73	+ 1.4%	111	+ 5.7%
Jun-2025	73	0.0%	112	+ 5.7%
Jul-2025	72	- 2.7%	113	+ 4.6%
Aug-2025	75	- 5.1%	119	+ 0.8%
Sep-2025	76	- 6.2%	115	0.0%
Oct-2025	77	+ 4.1%	120	+ 12.1%
12-Month Avg	74	- 1.3%	113	+ 4.6%



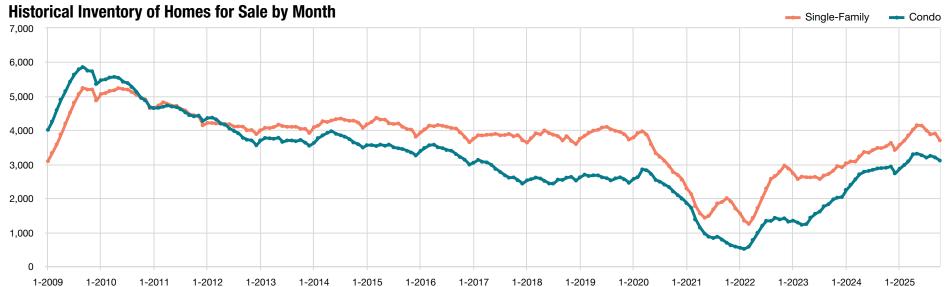
Inventory of Homes for Sale

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





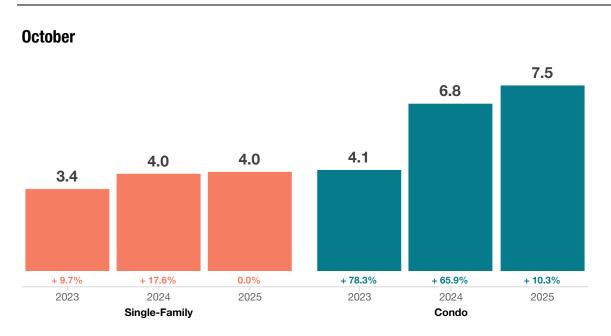
Homes for Sale	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	3,628	+ 23.2%	2,932	+ 45.4%
Dec-2024	3,419	+ 17.5%	2,730	+ 34.1%
Jan-2025	3,566	+ 17.9%	2,866	+ 27.7%
Feb-2025	3,693	+ 19.8%	2,977	+ 24.4%
Mar-2025	3,846	+ 25.0%	3,086	+ 20.7%
Apr-2025	4,018	+ 24.5%	3,293	+ 21.8%
May-2025	4,146	+ 23.4%	3,309	+ 19.1%
Jun-2025	4,134	+ 23.8%	3,263	+ 16.4%
Jul-2025	3,993	+ 16.9%	3,195	+ 12.7%
Aug-2025	3,881	+ 11.6%	3,246	+ 12.9%
Sep-2025	3,904	+ 12.3%	3,199	+ 10.8%
Oct-2025	3,703	+ 5.0%	3,109	+ 7.4%
12-Month Avg	3,828	+ 18.2%	3,100	+ 19.9%



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.





Months Supply	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Nov-2024	4.0	+ 14.3%	6.9	+ 64.3%
Dec-2024	3.8	+ 11.8%	6.5	+ 51.2%
Jan-2025	4.0	+ 14.3%	6.8	+ 41.7%
Feb-2025	4.1	+ 13.9%	7.2	+ 41.2%
Mar-2025	4.3	+ 22.9%	7.5	+ 33.9%
Apr-2025	4.5	+ 21.6%	8.1	+ 35.0%
May-2025	4.7	+ 23.7%	8.3	+ 36.1%
Jun-2025	4.6	+ 21.1%	8.2	+ 32.3%
Jul-2025	4.5	+ 15.4%	8.0	+ 25.0%
Aug-2025	4.3	+ 7.5%	8.1	+ 22.7%
Sep-2025	4.3	+ 10.3%	7.9	+ 16.2%
Oct-2025	4.0	0.0%	7.5	+ 10.3%
12-Month Avg*	4.3	+ 14.8%	7.6	+ 32.2%

^{*} Months Supply for all properties from November 2024 through October 2025. This is not the average of the individual figures above.

