

#1 in U.S. Luxury Rent Intensity — ALEX Intelligence 2026

\$2,922 Median Gross Rent in Top Luxury Counties

San Mateo leads the nation in rent intensity among top-tier markets

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THE DATA

\$2,922

Median Gross Rent (2024)

San Mateo County leads the nation in rent intensity among U.S. counties with a median home value of \$750,000 or more.

This figure reflects not just high housing costs, but the structural compression of rental yield potential in the most exclusive real estate markets. The gap between ownership and rental affordability is widening, signaling a shift in how luxury assets are valued and financed.

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 • ALEX Intelligence computation
<https://alex-companies.com/data/2026-09-21-luxe-luxe-gross-rent-county-us-luxury>



01

Rent Intensity Is a Valuation Signal

As interest rate expectations rise and corporate innovation declines due to tax policy shifts, the margin for error in luxury real estate financing shrinks. High rent intensity is not a sign of demand strength alone—it's a warning that market fundamentals are being tested by macroeconomic uncertainty.

02

Luxury Development Is Stalling

With tighter tax rules and higher long-term rate expectations, developers are deferring projects that rely on leveraged financing or multi-year ROI models. This creates a feedback loop: high rents in existing luxury markets discourage new supply, reinforcing price rigidity and increasing the risk of capital misallocation.



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