#1 of 6: Share of the Market's Post-2020 Homes in Its Top Three Cities

92.8% of new homes in the Lowcountry are in just three cities

Source: ALEX Intelligence, November 10, 2026

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THE DATA

92.8%

Share of the Market's Post-2020 Homes in Its Top Three Cities

This concentration is the highest in South Carolina among all cities with significant new construction activity.

The data reveals a stark spatial concentration: 92.8% of all homes built post-2020 in the Lowcountry are located in Bluffton, Hilton Head Island, and Beaufort. This level of clustering is unprecedented in the region's development history, signaling a deliberate and sustained focus on these three urban nodes. The implications for infrastructure, housing policy, and equity are profound.

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-10-hilton-head-concentration-new-homes-place

01

Supply is not just limited—its centralized

The 92.8% figure is not merely about volume—it reflects a strategic bifurcation in development. The Lowcountry’s growth is no longer distributed across a broad expanse; it’s being funneled into a narrow corridor of three urban centers. This centralization intensifies pressure on roads, utilities, and public services in those areas while leaving surrounding communities—like Port Royal, Burton, and Laurel Bay—underdeveloped and underserved. The result is a new kind of spatial inequality: not between rich and poor, but between connected and isolated.

02

Affordability is being sacrificed for density

The concentration of new construction in just three cities directly undermines regional affordability. As demand is funneled into these high-growth centers, price escalation is amplified, particularly in Bluffton and Hilton Head Island, where inventory is already tight. Now, with new supply hyper-concentrated, the only path to new homes is through these already overvalued markets—locking in higher prices and making homeownership inaccessible to even local workers.

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