25.2% Seasonal Use — #1 in SC

25.2% of Homes Are Seasonal — #1 in SC

Hilton Head leads South Carolina in second-home ownership, defining its market identity

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THE DATA

25.2%

Share of Homes Held for Seasonal Use (2024)

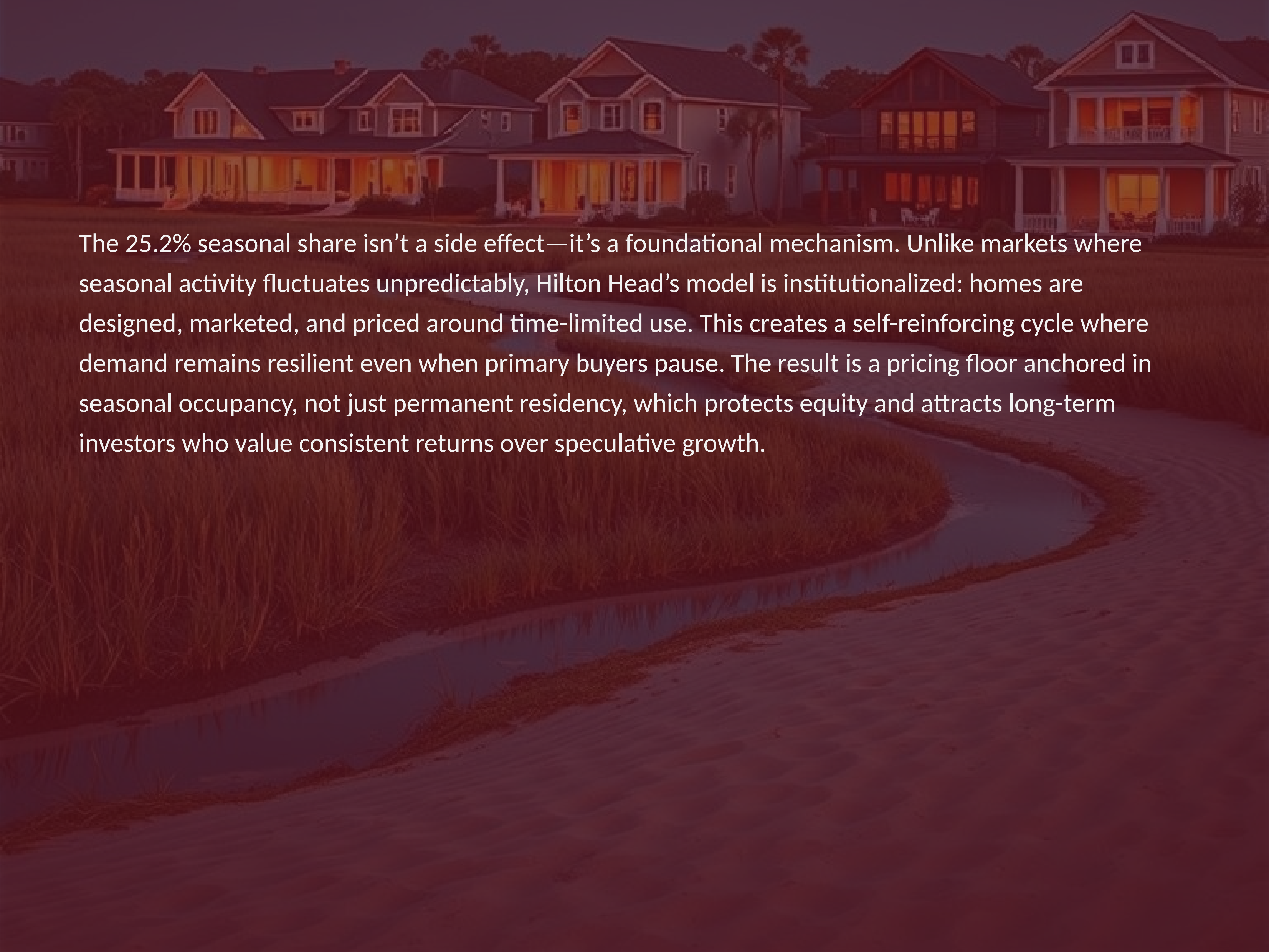
Hilton Head Island holds the highest share of homes designated for seasonal use in South Carolina.

This figure isn't just a number—it's a market signal. At 25.2%, Hilton Head Island is not merely a vacation hotspot; it's a destination where ownership is fundamentally tied to time-limited access. This structure supports price stability even during national softening, as seasonal demand acts as a buffer against downturns in primary housing markets. The high concentration of second homes also signals a deep-rooted cultural and economic identity built on transient luxury and seasonal exclusivity.

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-09-27-hilton-head-seasonal-share-place-mkt

01

Seasonal Demand as Market Anchor



The 25.2% seasonal share isn't a side effect—it's a foundational mechanism. Unlike markets where seasonal activity fluctuates unpredictably, Hilton Head's model is institutionalized: homes are designed, marketed, and priced around time-limited use. This creates a self-reinforcing cycle where demand remains resilient even when primary buyers pause. The result is a pricing floor anchored in seasonal occupancy, not just permanent residency, which protects equity and attracts long-term investors who value consistent returns over speculative growth.

02

Exclusivity Through Controlled Access

The dominance of seasonal use creates a de facto exclusivity that isn't priced in—it's spatially enforced. With 25.2% of homes occupied only part of the year, the island's effective housing supply is dynamically reduced during peak seasons, reinforcing scarcity. This scarcity is not artificial; it's a function of design and ownership structure. The market doesn't just sell homes—it sells access to a limited-time experience, turning real estate into a premium time-locked asset. This model resists commodification and supports premium pricing even in a moderating national climate.

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