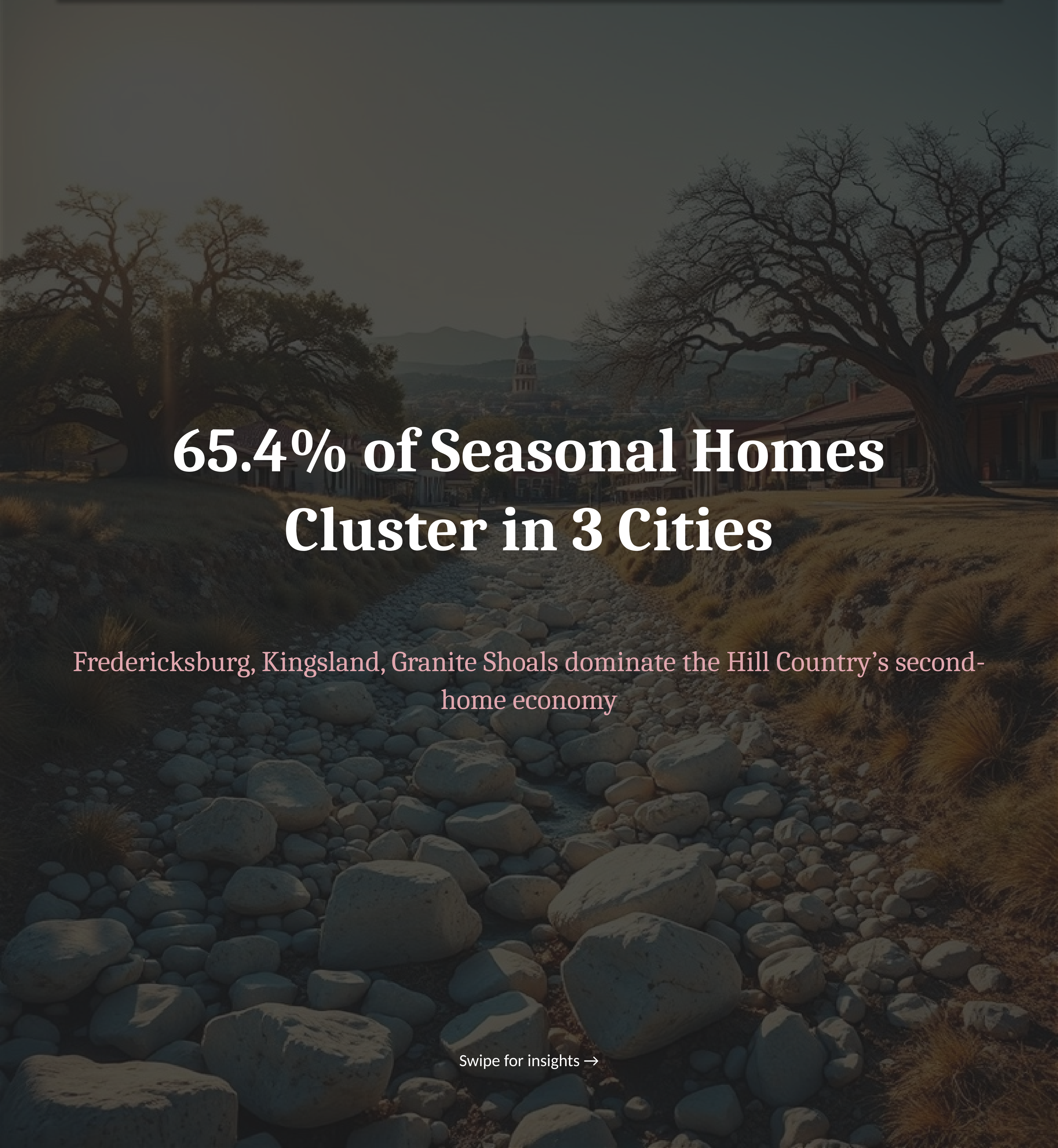
65.4% of Seasonal Homes Cluster in Top 3 Cities — ALEX Intelligence 2026



65.4% of Seasonal Homes Cluster in 3 Cities

Fredericksburg, Kingsland, Granite Shoals dominate the Hill Country's second-home economy

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THE DATA

65.4%

Share of the Market's Seasonal Homes in Its Top Three Cities (2024)

This concentration reflects a deep economic and cultural clustering that is shaping long-term investment and development patterns.

The Texas Hill Country’s seasonal housing market is not dispersed — it is hyper-concentrated. Fredericksburg, Kingsland, and Granite Shoals collectively host 65.4% of all seasonal homes in the region, a figure that signals not just tourism appeal, but structural economic advantage. This clustering is not accidental; it reflects decades of cultural investment, infrastructure development, and brand-building that have created self-reinforcing hubs of demand. The remaining cities, while growing, remain secondary in this ecosystem.

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-09-29-hill-country-tx-concentration-seasonal-homes-place

01

The 3-City Core is the Market's Engine

The Hill Country’s real estate value is not driven by broad, linear growth, but by the performance of a tight, high-velocity cluster. These three cities are not just destinations — they are economic engines that attract capital, talent, and infrastructure. Their success is not dependent on spreading wealth across the region, but on deepening their own ecosystems. This means that for investors, the most valuable real estate isn’t in the periphery — it’s within this core triangle. The rest of the region benefits from spillover, but the primary value creation is concentrated.

02

Peripheral Markets Are Not Catching Up

The data reveals a structural divergence: the top three cities are not just ahead, they are pulling away. The gap between the leading trio and the rest of the Hill Country is not narrowing — it's widening. Cities like Boerne and Marble Falls, while active, are not gaining ground in seasonal home share. This suggests that new development in other areas may not be capturing the same economic momentum. For public policy and long-term planning, this means that investment in transportation, utilities, and community services should be focused on the core, not assumed to be evenly distributed.

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