

91.2% of Seasonal Homes in Top 3 Cities — ALEX Intelligence 2026

91.2% of Nashville's Seasonal Homes Cluster Here

Top 3 cities host nearly all second homes in the metro — ALEX Intelligence, 2026

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THE DATA

91.2%

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

This concentration reflects a deep structural shift in where second homes are located across the Nashville metro.

The data reveals that 91.2% of seasonal homes in the Nashville metropolitan area are concentrated in just three cities: Nashville-Davidson metropolitan government, Franklin, and Hendersonville. This level of geographic clustering is not just a trend—it signals a redefinition of where secondary housing demand is being fulfilled. The implications extend beyond real estate into infrastructure, tourism, and long-term urban planning.

01

The Core is the Only Core

The near-total dominance of the top three cities implies that new development, zoning, and infrastructure planning must prioritize these areas, not just as residential zones, but as seasonal economic engines. This is not a passive trend—it is a strategic realignment of capital and demand.

02

The Fringe is Losing Ground

For communities on the edge of the metro, this creates a structural disadvantage. They may struggle to attract investment in second homes unless they can replicate the cultural or experiential value found in the top-tier cities. The result is a self-reinforcing cycle: more demand → more infrastructure → more desirability → more demand.



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