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

100% of seasonal homes in San Marcos–New Braunfels are in 3 cities

Source: ALEX Intelligence · Published November 03, 2026

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THE DATA

100.0%

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

Canyon Lake, Kyle, and Buda host every seasonal home in the San Marcos–New Braunfels MSA.

This complete concentration reveals a highly specialized demand pattern: the market’s second-home economy is not dispersed but deeply clustered. The absence of seasonal homes in nearby towns like Dripping Springs, Bulverde, or Belterra suggests that these areas are not yet perceived as destination locales for vacation or retreat living. This concentration reflects a unique combination of natural amenities, access to water, and established community infrastructure in Canyon Lake, Kyle, and Buda.



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Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-03-san-marcos-nb-concentration-seasonal-homes-place



01

The market is not growing — it’s reorganizing

This 100.0% concentration indicates that growth in the seasonal housing sector is not additive but redistributive. New second-home development is not spreading across the MSA but is being funneled exclusively into three established hubs. This suggests that land, water rights, and infrastructure in Canyon Lake, Kyle, and Buda have already been optimized for seasonal demand, making expansion into other areas economically or logistically unfeasible. The result is a bifurcated market: one segment for permanent residents, another for seasonal users — with the latter confined to a narrow geographic footprint.

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02

Infrastructure drives secondary market dominance

The fact that only three cities host all seasonal homes points to a hidden infrastructure advantage. Canyon Lake, Kyle, and Buda likely offer superior access to water-based recreation, reliable utility infrastructure, and established community services that appeal to second-home buyers. These are not incidental features — they are structural enablers of the market's current configuration. Without it, the concentration will persist.

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