#1 of 9: Share of the Market's Seasonal Homes in Its Top Three Cities

88.4% of Austin’s seasonal homes are in just 3 cities

Source: ALEX Intelligence · Published November 09, 2026

Swipe for insights →

Photo: Larry D. Moore · CC BY 4.0 · Wikimedia Commons

THE DATA

88.4%

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

This concentration reveals a structural shift in how Austin's second-home market is distributed across the metro.

Lago Vista, Lakeway, and Lockhart together house nearly nine out of every ten seasonal homes in the Austin MSA. This extreme clustering suggests that the appeal of second homes is no longer dispersed across the region but is instead anchored to a few specific, high-demand locations. The data reflects not just lifestyle preference but a strategic real estate allocation by investors and seasonal residents.



Photo: Todd Dwyer · CC BY-SA 3.0 · Wikimedia Commons

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-09-austin-msa-concentration-seasonal-homes-place

01

The three cities are not just popular — they’re dominant

The fact that Manor, Bee Cave, Hornsby Bend, and Steiner Ranch report zero seasonal homes underscores a stark divergence: even within the same region, not all areas are equally attractive for second homes. This is not a random distribution — it’s a signal of policy, geography, and infrastructure shaping demand.

Photo: Aleksandr Zykov from Russia · CC BY-SA 2.0 · Wikimedia Commons



Photo: H. Michael Miley · CC BY-SA 2.0 · Wikimedia Commons

02

The concentration is a market signal, not a trend

For investors and developers, this means that opportunities in seasonal housing are not in expansion but in optimization — improving existing properties, enhancing amenities, and navigating local zoning to capture value where it already exists. The future of seasonal housing in Austin is not about opening new frontiers, but about deepening presence in the few places that already matter.

Real Estate Strategy & Intelligence Leader. Democratized Blue Ocean Strategist & Operator.

Diane Hart Alexander, MBA, MHA

Chair & CEO, ALEX Companies
Designated Broker, Alexander Tiffany Southwest, LLC dba ALEX.realestate, et.al.
Texas License #574877-B · Broker License #565194-BB

diane@alex.realestate · +1 713.591.9902

ALEX

ALEX Intelligence
deep intelligence

ALEX Real Estate
genius real estate

ALEX Advisory
uncontested strategy

ALEX Cares
purposeful philanthropy