#1 of 10: Share of the Market's Seasonal Homes in Its Top Three Zip Codes

53.6% of Charleston’s seasonal homes are in just three ZIP codes

Based on 2024 Census data — source: ALEX Intelligence

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THE DATA

53.6%

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

The concentration of seasonal homes in three ZIP codes reflects a deepening spatial divide in Charleston’s housing market.

This level of concentration—53.6% of all seasonal homes clustered in ZIP 29455, 29438, and 29451—indicates a powerful, self-reinforcing real estate dynamic. These three ZIPs are not just popular; they are becoming the de facto epicenter of second-home activity in the tri-county region. The clustering suggests that infrastructure, amenity access, and perceived exclusivity are now more decisive than price in driving seasonal demand.



Photo: Warren LeMay from Covington, KY, United States · CC0 · Wikimedia Commons

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-13-charleston-sc-concentration-seasonal-homes-zcta

01

The market is bifurcating by access

For buyers, this means that location is no longer a choice—it’s a gatekeeping mechanism. The value of a property is increasingly determined not by its physical attributes alone, but by its proximity to the established seasonal hotspots. This dynamic is creating a new kind of real estate arbitrage: not between urban and rural, but between 'in' and 'out' of the seasonal core.

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02

The core is self-reinforcing

The data shows that ZIP 29455 alone holds 4,053 seasonal homes—more than double the next highest ZIP. This scale is not just about popularity; it's about network effects. The concentration of second homes in these ZIPs means that they are becoming cultural and economic islands within the broader Charleston metro, where local norms, property values, and even infrastructure investment are increasingly shaped by seasonal demand rather than year-round residents.

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