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



13.8% of DFW’s seasonal homes are in just three ZIPs

Source: ALEX Intelligence · Published November 22, 2026

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THE DATA

13.8%

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

This concentration reflects an extreme clustering of second-home demand in a small number of high-amenity suburban ZIPs.

The data reveals that seasonal housing in the Dallas-Fort Worth MSA is not dispersed but deeply concentrated. ZIP 75143, 76049, and 76048 collectively house nearly one in seven seasonal homes across the entire metro area. This level of aggregation suggests that a handful of communities have become de facto seasonal hubs, driven by lifestyle appeal, access to amenities, and perceived exclusivity.



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Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-22-dfw-msa-concentration-seasonal-homes-zcta

01

The market is bifurcating by use case

This data shows a growing divide between primary and secondary housing markets. The clustering in ZIPs like 75143 (The Colony) and 76049 (Frisco) indicates that these areas are being redefined as premium seasonal destinations, not just residential neighborhoods. As such, they are becoming less accessible to first-time buyers and more attractive to investors and out-of-state buyers seeking lifestyle assets — accelerating price pressures in these zones while leaving other areas underserved.

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02

Seasonal demand is driving long-term value capture

The fact that 13.8% of all seasonal homes are concentrated in three ZIPs means that a small number of locations are capturing disproportionate economic value. These areas are likely to see faster appreciation, higher rental yields during peak seasons, and greater capitalization on lifestyle branding. This suggests that the real estate value in DFW is no longer just about location, but about the ability to monetize time, experience, and exclusivity — a shift with long-term implications for zoning, development, and investor strategy.

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

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