

#1 in Texas Migration Concentration — ALEX Intelligence 2026

97.9% of New Inflows From 3 States

San Marcos-New Braunfels leads Texas in migration concentration — ALEX Intelligence, 2026

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THE DATA

97.9%

Share of Arriving Households From the Top Three States (2023)

San Marcos-New Braunfels MSA is the most geographically concentrated inbound migration market in Texas.

This figure — 97.9% — reflects that nearly all new households arriving in the MSA come from just three states: Texas, California, and Arizona. The dominance of in-state migration (Texas at 15,805 households) is a structural advantage, reinforcing local economic continuity. California and Arizona contribute 866 and 107 households respectively, signaling a strong interregional pull from Sun Belt and tech-driven metros.

Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2022-23 · ALEX Intelligence computation

<https://alex-companies.com/data/2026-09-21-san-marcos-nb-mig-state-top3>



01

Migration Is a Self-Reinforcing Cycle

The overwhelming concentration of migration from Texas, California, and Arizona creates a feedback loop. New residents from Texas bring familiarity with local culture, labor markets, and infrastructure. Those from California and Arizona are drawn by climate, affordability relative to home markets, and proximity to Austin's tech economy. This cohesion reduces cultural friction, accelerates integration, and strengthens demand for housing, services, and local business — all without the need for external branding or recruitment campaigns.



02

The Risk of Over-Reliance on Three States

While high concentration fuels growth, it also creates vulnerability. A downturn in any of the three origin states — particularly California or Arizona — could trigger a synchronized pullback in migration. This is especially relevant given California's ongoing fiscal and housing challenges. The MSA's success depends on maintaining its appeal as a stable, livable alternative, not just a geographic stopgap. Diversification of origin states is not a luxury but a strategic imperative to ensure long-term resilience.

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