

#1 in Texas Migration Concentration — ALEX Intelligence 2026

97.9% of Inflows From 3 States

San Marcos-New Braunfels leads Texas in migration concentration

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THE DATA

97.9%

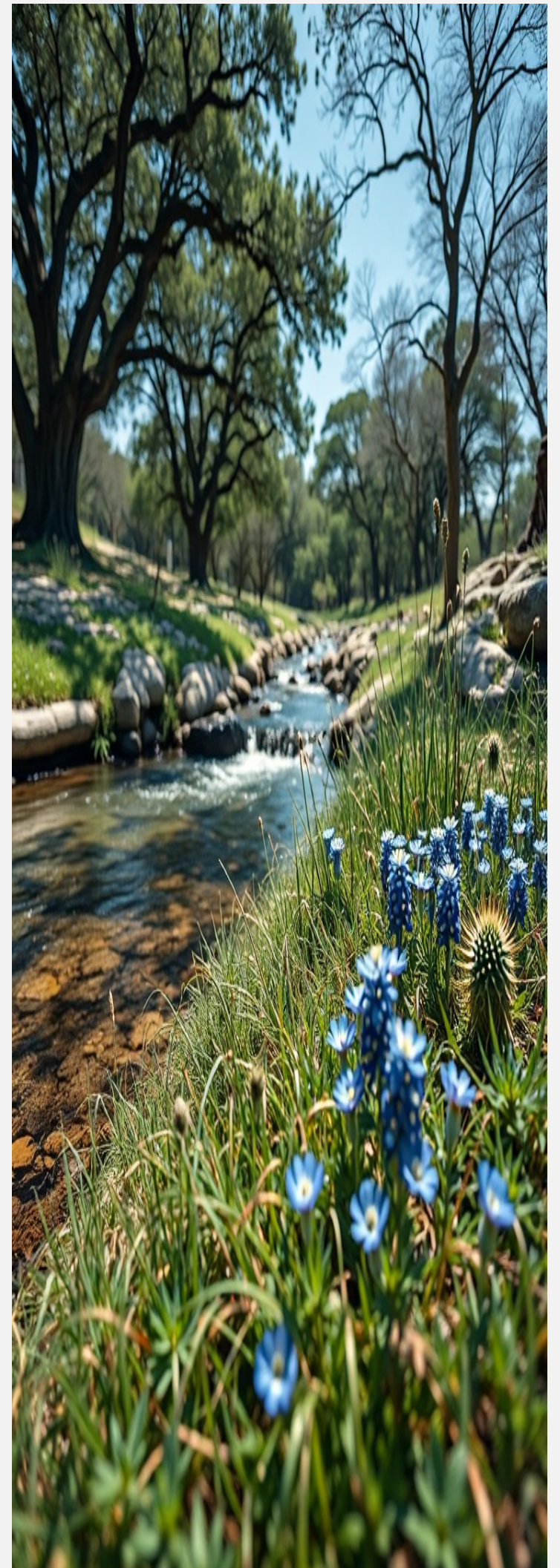
Share of Arriving Households From the Top Three States (2023)

The San Marcos-New Braunfels MSA receives 97.9% of its new households from just three states.

This level of migration concentration—driven by Texas, California, and Arizona—is unmatched in Texas. It reflects a deep, self-reinforcing regional identity forming around shared values and infrastructure needs. The influx is not random; it is a deliberate exodus from high-cost, high-regulation states toward a market with stable governance, growing employment, and accessible land.

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 as a Structural Moat

The 97.9% concentration creates a unique economic moat. Unlike markets with broad, diffuse inflows, San Marcos-New Braunfels benefits from a homogenous incoming population with aligned expectations: affordable housing, strong schools, and low regulatory friction. This cohesion accelerates community development, reduces social friction, and strengthens local institutions. It is not just growth—it is growth with purpose and shared vision.



02

The Paradox of Convergence

While most markets strive for economic convergence, San Marcos-New Braunfels is experiencing a divergence in migration patterns. The top three states dominate not by accident but by strategic choice. This concentration signals a growing preference for places that offer both opportunity and stability—rare in today’s fragmented national landscape. As federal policies tighten, this homogeneity may become a competitive advantage, attracting long-term residents who prioritize predictability over novelty.

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