

Texas Supplies 57.1% of Austin MSA's Inbound Migration — ALEX Intelligence 2026

Texas Supplies 57.1% of Austin's New Households

Self-sustaining migration fuels Austin's growth — and its affordability crisis

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THE DATA

57.1%

Share of Arriving Households From One State (2023)

Texas supplies more of the Austin metro's inbound migration than any other state.

This dominance reflects a deep regional integration: Austin is no longer just attracting distant talent — it is consolidating Texas' own population surge. The influx from within the state is not a sign of stagnation, but of a self-reinforcing cycle where rising costs in Houston, Dallas, and San Antonio push residents toward Austin's growing infrastructure, even as Austin's own prices rise. The data reveals a market that is not only growing, but growing from within.

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/2026-09-23-austin-msa-mig-state-leader>

01

Affordability Is a Regional Lock-In

Austin's housing market is not just expensive — it is structurally dependent on internal migration. With over half of new arrivals coming from within Texas, the city is experiencing a self-sustaining growth loop: rising prices drive people out of other Texas metros, who then move into Austin, pushing prices higher. This feedback mechanism makes traditional affordability interventions — like increasing supply or reducing demand — ineffective unless they directly target the state's internal displacement patterns. The market is not just reacting to national trends; it is generating its own momentum.



02

Policy Must Address Internal Displacement

The fact that Texas supplies 57.1% of Austin's new households means that regional policy — not just local — shapes housing stability. Travis and Hays Counties cannot solve affordability alone; they must coordinate with state-level planning to manage the flow of residents from overburdened metros like Dallas and Houston. Without such coordination, Austin will continue to absorb the overflow, reinforcing a cycle of displacement rather than solving it. This data demands a shift from city-centric to state-wide housing strategy — one that recognizes Austin as both a magnet and a sponge for Texas's urban pressures.

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