

#1 in Texas: Net Household Inflows from a Single County

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San Marcos-New Braunfels leads all Texas MSAs in migration from one county

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THE DATA

2,617

Net Households Gained From a Single County (2023)

San Marcos-New Braunfels MSA gained 2,617 more households from Travis County, Texas, than it lost to it in the 2022–23 period.

This figure is not just a volume — it's a directional signal. Travis County, home to Austin, is the single largest source of net household inflow into the San Marcos-New Braunfels market. This reflects a structural migration pattern: Austin-area residents are choosing affordability and proximity over urban density, settling in Hays and Comal counties where housing remains more accessible. The magnitude of this net gain underscores the MSA's role as a suburbanization engine within Texas's most dynamic corridor.

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-san-marcos-nb-mig-net-partner>



01

Affordability is the Migration Engine

The 2,617 net households from Travis County are not just moving — they are fleeing a housing market that has priced out many. The San Marcos-New Braunfels MSA is not attracting people from across the country; it is capturing the overflow from Texas's most expensive urban core. This is not a passive demographic shift — it's a strategic retreat from high-cost living, driven by the region's ability to deliver more space, lower prices, and access to infrastructure without sacrificing connectivity to Austin's economy. This dynamic is reshaping regional development, with builders adapting to demand from lower-income and first-time buyers.



02

The Hidden Cost of Growth

Every household gained from Travis County carries with it a multiplier effect: increased demand for schools, roads, utilities, and emergency services. While the inflow is a sign of economic vitality, it also signals that the region is operating at the edge of its capacity. The IRS data shows this net gain is not isolated — it's part of a broader pattern where high-growth MSAs in Texas are absorbing migration from overburdened urban centers. Without coordinated infrastructure investment, this inflow could lead to congestion, service strain, and long-term affordability erosion — turning today's migration advantage into tomorrow's systemic challenge.

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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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