

Top 3 Counties Supply 11.4% of Houston MSA Inbound Households

11.4% of Houston's new households come from just 3 counties

Travis, Dallas, and Bexar dominate inbound migration — ALEX Intelligence, 2026

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THE DATA

11.4%

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

This figure reflects the concentration of migration into the Houston MSA from only three counties, despite the region's vast geographic footprint.

The data reveals a stark dependency: over 11% of new households moving into the Houston metro originate from just three counties—Travis, Dallas, and Bexar. This concentration signals that Houston's growth is not broadly distributed but instead heavily reliant on a few key source markets. The low share of inflows from other regions suggests that migration patterns are increasingly polarized, with limited diversification in origin counties.

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/2026-09-25-houston-msa-mig-county-top3>



01

Migration dependency creates vulnerability

Houston's real estate market is structurally exposed to shifts in the economic or demographic conditions of just three source counties. If Travis County experiences a downturn—such as rising housing costs or job losses—Houston's growth engine could stall. This narrow base limits resilience, especially in a high-interest-rate environment where migration is already sensitive to affordability and employment trends.



02

Suburban growth is not self-sustaining

The dominance of these three counties underscores that Houston's suburban expansion is not being driven by organic regional growth but by external migration. This means that areas like Conroe, Katy, and The Woodlands rely on inflows from outside the MSA, making them vulnerable to national migration trends. Without diversified sources, these corridors face long-term stagnation if inbound flows from Travis, Dallas, and Bexar decline.

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