

#1 of 6 in San Marcos-New Braunfels MSA, #1 of 10 in Texas

#1 in MSA, #1 in Texas

Five-Vintage In-Migration Surge — ALEX Intelligence, 2026

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THE DATA

32.5%

Five-Vintage Change in Households Moving In (2023)

San Marcos-New Braunfels MSA saw a 32.5% rise in in-migration between 2017-18 and 2022-23, the highest in Texas.

This surge reflects a sustained shift in household movement patterns, not a one-off spike. The data reveals a structural migration trend, with households from key regional counties increasingly choosing Hays and Comal counties as their new home. The increase is not driven by a single county but by a broad, multi-county reallocation of population.

Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2017-18 and 2022-23 · ALEX Intelligence computation
<https://alex-companies.com/data/2026-10-09-san-marcos-nb-mig-trend-in-long>



01

Migration Momentum is Structural

The persistence of this inflow across five vintages suggests that the market has achieved critical mass in terms of infrastructure, employment, and community development. This momentum is self-reinforcing: new residents attract new services, which in turn draw more residents.



02

Affordability as a Strategic Magnet

This is not a flight to the suburbs. It is a calculated realignment. The data shows that the top sending counties—Travis, Bexar, Williamson—are all within the same metro corridor, yet the destination is now shifting toward the MSA's core. This signals a new phase of Texas urbanization: the decentralization of metropolitan demand.

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