

#1 in San Marcos-New Braunfels MSA, #1 in Texas — ALEX Intelligence 2026

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The top-ranked migration engine in Texas — by households, not just people

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THE DATA

5,473

Net Migration in Households (2023)

The San Marcos-New Braunfels market gained 5,473 households through migration in 2022–23, the highest in Texas.

This figure represents a net inflow of entire households — not just individuals — indicating sustained, family-level relocation. The magnitude of this movement suggests deep structural demand for housing, infrastructure, and services. It is not a short-term spike, but a consistent pattern of population repositioning toward this MSA.

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/2026-10-11-san-marcos-nb-mig-net-total>



01

Migration is the new foundation

The leading migration source counties — Travis, Bexar, Harris — are all high-cost, high-density markets. Their residents are not fleeing; they are relocating strategically. This is not an exodus from Texas, but a redistribution within it — a shift toward a place with better cost-of-living balance, infrastructure stability, and quality of life. The MSA is winning the competition for talent and family capital.

02

The hidden cost of migration

Hays County's County Strategic Plan explicitly identifies housing affordability and water sustainability as top priorities — precisely the issues that migration intensifies. The very success of the MSA as a migration destination is now threatening its long-term viability. Without proactive investment in water infrastructure, zoning reform, and mixed-income development, the migration engine risks triggering a supply crunch that could reverse the trend.



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Real Estate Strategy & Intelligence Leader. Democratized Blue Ocean Strategist & Operator.

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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