

Texas — #1 of 10: Share of Arriving Households From One State

Texas leads all states in San Marcos-New Braunfels migration

92.2% of new households come from Texas, per ALEX Intelligence data

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THE DATA

92.2%

Share of Arriving Households From One State (2023)

Texas accounts for over nine in ten new households moving into the San Marcos-New Braunfels MSA.

This unprecedented level of in-state migration underscores a deepening regional self-sufficiency in population growth. Unlike markets dependent on out-of-state influx, San Marcos-New Braunfels is being reshaped by internal Texas dynamics — a trend that reinforces local economic resilience and reduces exposure to national housing market volatility.

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/2026-10-12-san-marcos-nb-mig-state-leader>

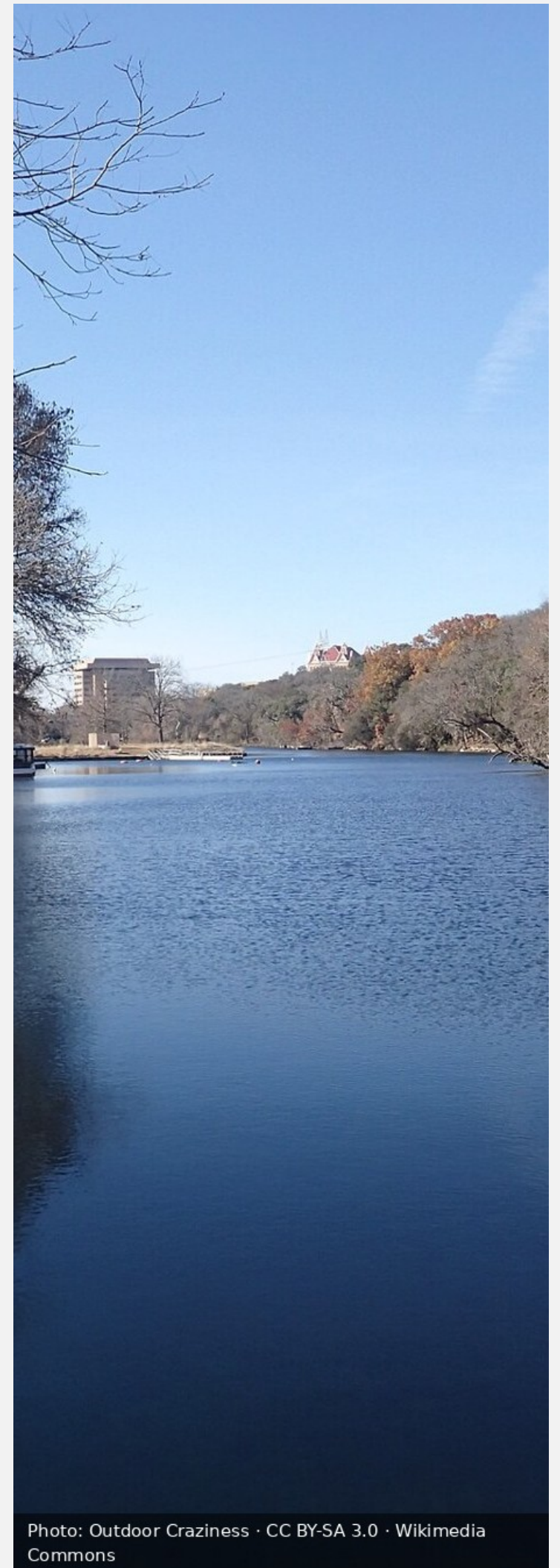


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01

Migration is self-reinforcing

With 92.2% of new residents coming from Texas, the market is not just attracting people — it's retaining them. This high rate of in-state movement suggests strong local job growth, affordable housing relative to Austin, and a lifestyle that resonates with Texas residents. The feedback loop is clear: more people move in, more demand builds, and the region becomes even more attractive to the next wave of migrants.

02

Texas is the engine of growth

The dominance of Texas-originating households reveals a structural shift: the San Marcos-New Braunfels MSA is no longer a satellite of larger metros. Instead, it's becoming a destination in its own right — drawing from within the state's expanding population base. This internal migration engine reduces reliance on external economic shocks and positions the region as a core node in Texas' decentralized urbanization pattern.



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