

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

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 92.2% of new households come from Texas — ALEX Intelligence 2026 Migration Report

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THE DATA

92.2%

Share of Arriving Households From One State (2023)

Texas supplies more of the San Marcos-New Braunfels market's inbound migration than any other state.

This overwhelming dominance of in-state migration reflects a deep regional self-sustaining cycle: Texas residents are not just moving to the area — they are reshaping its demographic, economic, and cultural fabric. The data reveals a market that is not reliant on out-of-state influxes, but instead fueled by internal mobility across Texas, particularly from Austin, Dallas, and San Antonio MSA corridors.

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>



Photo: Larry D. Moore · CC BY 4.0 · Wikimedia Commons

A woman in a long, patterned dress is shown from the waist up, pouring water from a large, dark, rounded pot. She is standing in front of a background of bare, dark tree branches. The entire image is covered with a semi-transparent dark red overlay. The number '01' is in the top left corner, and the title 'Migration is self-reinforcing' is in the upper middle. A paragraph of text is in the lower middle, and a photo credit is at the bottom left.

01

Migration is self-reinforcing

The fact that 92.2% of new households originate in Texas means that the market's growth is not dependent on national trends or external shocks. Instead, it is driven by a closed-loop system where Texas residents, drawn by affordability, quality of life, and infrastructure, choose San Marcos-New Braunfels over other Texas cities. This internal momentum creates a resilient demand base that is insulated from broader economic volatility and less sensitive to national interest rate shifts.

02

Texas is the new homebuilder

With nearly all new residents coming from within the state, the market's future development is shaped by Texas-specific preferences: proximity to work, access to outdoor recreation, and school quality. Developers are responding not to national trends but to local demand patterns rooted in Texas culture — from single-family homes with outdoor living to community-oriented neighborhoods. This internal alignment between supply and demand reduces market friction and accelerates absorption.



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