

Travis County, TX — #1 of 10: Decline in Households Moving In, by Origin County

San Marcos

Travis County Leads in Outflow to San Marcos–New Braunfels

Source: ALEX Intelligence, October 26, 2026

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THE DATA

-441

Decline in Households Moving In, by Origin County (2023)

Travis County, TX, recorded the largest drop in households relocating to the San Marcos–New Braunfels MSA between 2021–22 and 2022–23.

This decline marks a significant shift in migration patterns, signaling that the San Marcos–New Braunfels market may be reaching a saturation point for inbound growth from Austin’s core. Despite rising affordability pressures in Travis County, the exodus of households suggests a growing preference for suburban or exurban relocation, even as Austin’s broader metro continues to expand.

Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2021–22 and 2022–23 · ALEX Intelligence computation

<https://alex-companies.com/data/2026-10-26-san-marcos-nb-mig-trend-origin-asc>

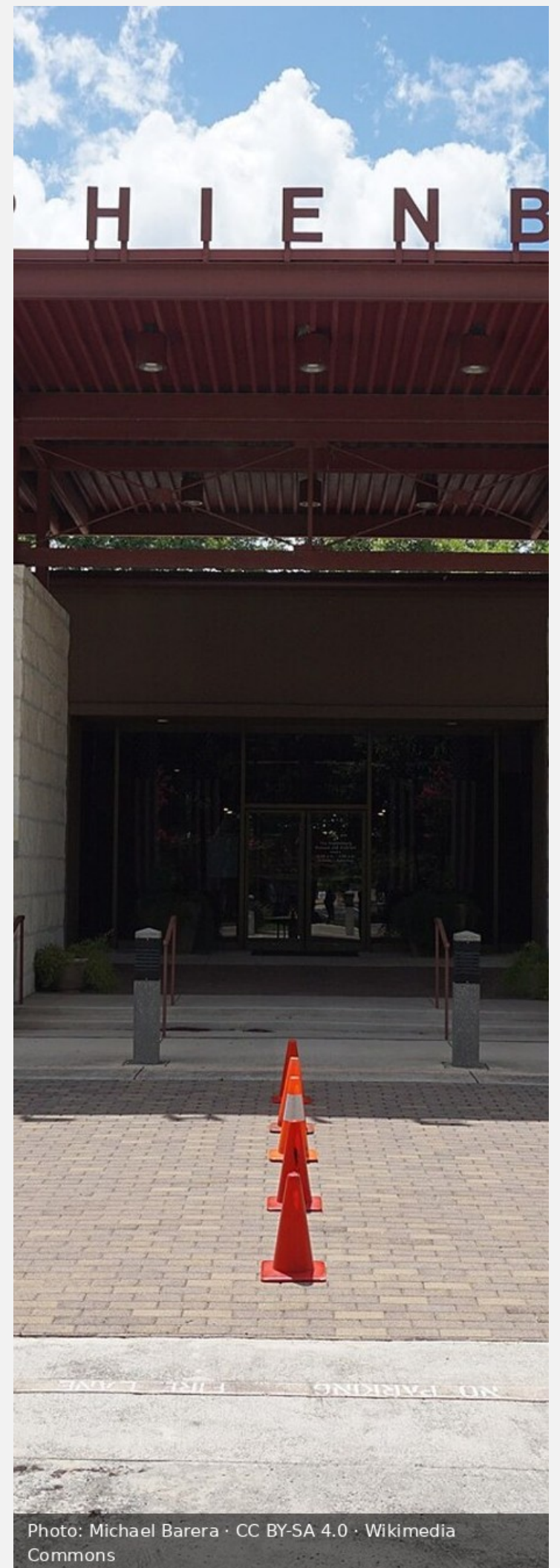
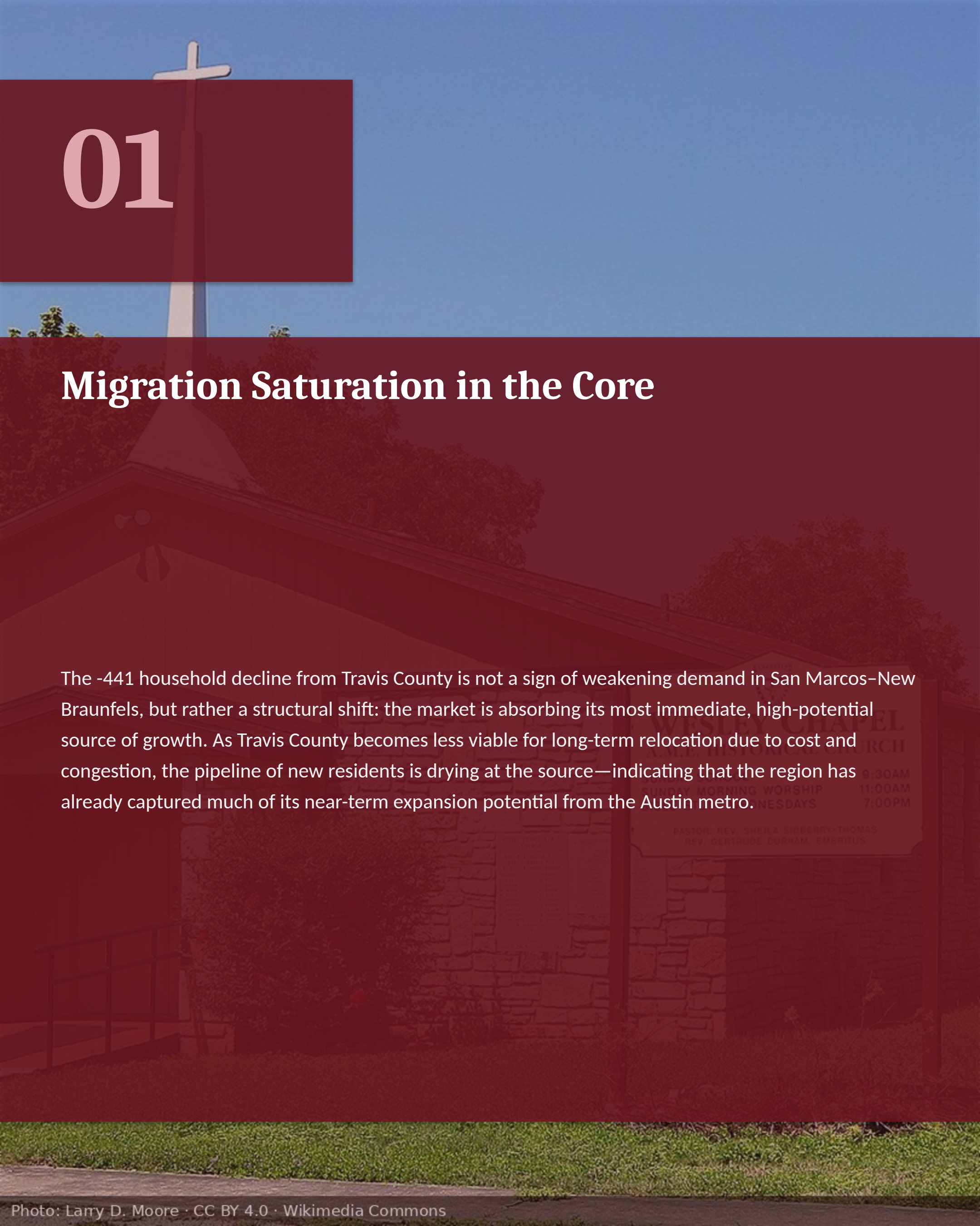


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01

Migration Saturation in the Core

The -441 household decline from Travis County is not a sign of weakening demand in San Marcos–New Braunfels, but rather a structural shift: the market is absorbing its most immediate, high-potential source of growth. As Travis County becomes less viable for long-term relocation due to cost and congestion, the pipeline of new residents is drying at the source—indicating that the region has already captured much of its near-term expansion potential from the Austin metro.

02

Affordability as a Relocation Filter

This outflow suggests that affordability in San Marcos–New Braunfels is no longer a universal attractor. Households from Travis County, despite facing higher costs, are now choosing to stay put or relocate elsewhere—possibly to more distant or less competitive markets. This implies that the current price-to-income threshold in the MSA may be approaching a point where further growth depends not on inbound migration from nearby counties, but on broader demographic or economic shifts.



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