#1 of 10: Share of Arriving Households From the Top Three Counties



28.6% of new households come from just 3 counties

Source: ALEX Intelligence · Published November 03, 2026

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THE DATA

28.6%

Share of Arriving Households From the Top Three Counties (2023)

This concentration reveals a narrow source of population growth in the Killeen-Temple MSA.

The data shows that nearly three in ten new households in the Killeen-Temple MSA—comprising Bell, Coryell, and Lampasas counties—originated from only three counties: Williamson, Travis, and McLennan. This level of geographic concentration is not typical of a diverse regional economy and suggests that migration patterns are heavily influenced by specific employment centers, particularly Fort Cavazos and the Baylor Scott & White medical corridor in Temple. The fact that Williamson County, despite being excluded from this group's market, remains the top source underscores the enduring pull of military and healthcare employment hubs.

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/2026-11-03-killeen-temple-mig-county-top3

01

Growth is not organic—it’s engineered

The dominance of Williamson, Travis, and McLennan counties as sources of inbound migration indicates that population growth in the Killeen-Temple MSA is not driven by broad regional expansion but by targeted labor flows. Williamson County’s top position reflects a sustained outflow of military-affiliated professionals and healthcare workers from Austin’s high-cost environment. Travis County’s presence confirms the spill-over effect of Austin’s housing market, while McLennan County’s inclusion signals a regional core of military and service-sector employment. This is not spontaneous growth—it is a predictable migration pattern shaped by institutional employment, not general market appeal.

02

The market is structurally dependent

If military recruitment slows, or if Austin's job market stabilizes, the inflow could contract sharply. The lack of diversification in origin counties means that housing demand is tied to the performance of a few high-sensitivity employment clusters. This dependency limits long-term resilience and suggests that new development should be aligned with workforce retention strategies, not just speculative growth. The real estate market is not just responding to demand—it is being shaped by it.

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