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

28.6% of Austin’s new households come from just 3 counties

Source: ALEX Intelligence · Published November 04, 2026

Swipe for insights →

Photo: plutonature333 · CC BY-SA 3.0 · Wikimedia Commons

THE DATA

28.6%

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

This figure reflects the degree to which inbound migration to the Austin metro is hyper-concentrated in a small number of source regions.

The data shows that nearly three out of every ten new households moving into the Austin metro originate from just three counties: Williamson County, Harris County, and Hays County. This level of concentration suggests that Austin's growth is being driven not by broad regional diversification, but by a narrow set of source markets —particularly within Central Texas and the Houston corridor.



Photo: Lynn75 · CC BY-SA 3.0 · Wikimedia Commons

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/2026-11-04-austin-msa-mig-county-top3

01

Austin’s growth is not diversifying—yet

The dominance of Williamson, Harris, and Hays counties as sources of new households reveals that Austin’s expansion is still largely self-replicating. Talent and capital are flowing from existing high-density, high-income hubs into the core city, reinforcing existing economic and demographic patterns. This lack of geographic breadth in migration limits the potential for new cultural or economic innovation from outside the established corridors, making Austin’s growth increasingly insular.

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



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

02

The real estate impact is structural

Because the top three source counties are already among the most expensive in Texas—especially Williamson and Harris—this migration pattern means that incoming households are not only concentrated but also bringing higher-than-average income levels. This directly pressures affordability, fuels demand for premium housing, and reinforces the upward trajectory of home values in Austin's core, even as supply constraints persist. The market is not just growing—it's being shaped by a self-reinforcing cycle of high-income mobility.

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

ALEX

ALEX Intelligence
deep intelligence

ALEX Real Estate
genius real estate

ALEX Advisory
uncontested strategy

ALEX Cares
purposeful philanthropy