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

70.5% of new San Antonio households come from just three states

Data: ALEX Intelligence, 2026

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THE DATA

70.5%

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

San Antonio’s inbound migration is more concentrated than any other Texas metro.

This level of concentration—70.5% from Texas, California, and Florida—reflects a deeply synchronized migration pattern. It suggests that the city is not merely attracting broad national movement but is becoming a destination of choice for specific regional clusters, particularly from high-cost coastal and border states. This clustering may signal a shift in how regional economies compete for talent and housing demand.



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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/2026-11-06-sa-msa-mig-state-top3

01

Migration concentration drives housing demand

The top three states account for the vast majority of new arrivals, indicating that housing demand is not diffuse but highly targeted. This concentration suggests that developers and investors should prioritize inventory in areas that serve these migration corridors—particularly in neighborhoods with access to employment hubs, schools, and transportation networks that align with the needs of in-migrants from California and Florida. The pattern implies that supply-side strategies must be hyper-localized, not generic.

Furthermore, this trend may reduce the risk of oversupply in the mid-tier segment, as demand is not spreading evenly across all price points. Instead, it’s coalescing in specific zones, creating pockets of sustained price appreciation.

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02

Geographic insulation fuels local stability

San Antonio's migration pattern—over 70% from just three states—creates a degree of insulation from broader national economic volatility. Unlike metros where migration is fragmented across dozens of states, San Antonio's inbound flows are self-reinforcing and regionally anchored. This insulation may buffer the market from national downturns in mobility, as new residents are less likely to leave en masse during economic stress.

The data also implies that San Antonio is becoming a migration destination of last resort for those fleeing high taxes and housing costs in California and Florida. This long-term trend, if sustained, could solidify the city's position as a demographic and economic anchor in Texas, reducing turnover and increasing housing tenure.

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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

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