#1 of 10: Year-Over-Year Change in Households Moving In

San Marcos-New Braunfels In-Migration Growth at 0.7%

ALEX Intelligence 2026 — Flat Inflow After 2021-22

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THE DATA

0.7%

Year-Over-Year Change in Households Moving In (2023)

The San Marcos-New Braunfels market saw in-migration growth hold roughly flat between 2021-22 and 2022-23.

This near-stagnation in household inflows signals a potential saturation point in the region’s growth trajectory. Despite continued demand, the rate of new residents entering the market has not increased, suggesting that current housing supply and infrastructure may be approaching capacity. The lack of acceleration raises questions about the sustainability of rapid expansion in Hays and Comal counties.


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

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/2026-11-10-san-marcos-nb-mig-trend-in-total

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In-Migration Plateau Signals Market Maturity

For real estate professionals, this means shifting focus from acquisition to community engagement, sustainability, and value-added amenities that attract and retain residents.

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Bexar County Remains Top Source of In-Migration

This dynamic reveals a deeper trend: the San Marcos-New Braunfels MSA is no longer a magnet for new migration, but rather a destination for people already within a defined regional radius. The future lies in retaining these residents and enhancing their experience, not in attracting new ones from farther afield.

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