#1 of 9: Share of the Market's Post-2020 Homes in Its Top Three Cities

75.1% of Austin’s new homes are in just three cities

Manor, Lago Vista, and Lakeway lead in post-2020 delivery

Swipe for insights →

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

THE DATA

75.1%

Share of the Market's Post-2020 Homes in Its Top Three Cities

This figure reflects the concentration of new housing delivery across the Austin MSA since 2020.

The overwhelming share of new homes in the Austin metro is not spread across the region but is instead heavily concentrated in three cities: Manor, Lago Vista, and Lakeway. This level of concentration suggests a shift in development patterns, with growth increasingly driven by a few suburban hubs rather than a broad-based expansion.



Photo: Aleksandr Zykov from Russia · CC BY-SA 2.0 · Wikimedia Commons

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-17-austin-msa-concentration-new-homes-place

01

Growth is no longer inclusive

The dominance of Manor, Lago Vista, and Lakeway in new home construction signals a divergence in access to housing opportunity. As these three cities absorb the vast majority of new units, other parts of the Austin MSA—especially those with lower land availability or higher regulatory barriers—face increasing pressure to keep pace or risk being left behind in economic and demographic trends.

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



Photo: Aleksandr Zykov from Russia · CC BY-SA 2.0 · Wikimedia Commons

02

New homes aren’t just building— they’re reshaping identity

The concentration of new homes in these three cities isn't just a construction trend—it's a demographic and cultural signal. These areas are becoming the primary entry points for new residents, shaping the identity of the broader Austin metro. As new households settle in these enclaves, they bring different economic profiles, mobility patterns, and political preferences, potentially redefining the region’s social fabric over time.

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