#1 of 10: Change in the Income Gap Between Arriving and Departing Households

San Marcos-New Braunfels leads Texas in income gap widening

Source: ALEX Intelligence · Published November 24, 2026

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THE DATA

14.5%

Change in the Income Gap Between Arriving and Departing Households (2024)

San Marcos-New Braunfels ranks #1 in Texas for the fastest-growing earnings gap between new arrivals and those leaving the area.

This 14.5% widening reflects a growing divergence in household income levels: incoming residents are increasingly earning significantly more than those departing. The trend is not driven by population inflow alone but by a selective migration of higher-income households into the market.



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Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2022-23 and 2023-24 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-24-san-marcos-nb-mig-trend-agi

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Migration is becoming income-selective

The data reveals a self-reinforcing cycle: as higher-earning households arrive, they increase local demand for premium housing, services, and amenities. This drives up property values and operating costs, which in turn excludes lower- and middle-income residents who may be moving out due to affordability pressures. The market is not just growing—it's stratifying by income at the point of entry.

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02

Affordability is a migration filter

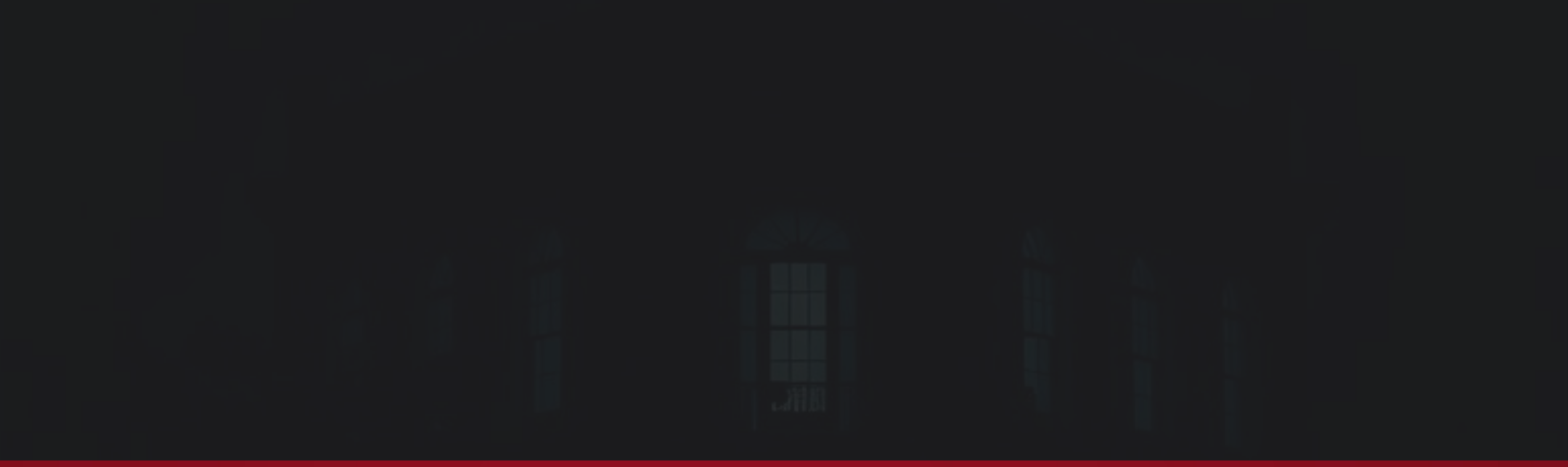
This widening gap suggests that affordability is no longer just a barrier to entry—it's a mechanism of exclusion. Households leaving the area are not necessarily poorer, but they are likely to be those whose incomes are not keeping pace with rising local costs. The result is a market that increasingly favors wealth accumulation over broad-based access, reshaping the demographic and economic fabric of Hays and Comal counties.

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



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