

Flat In-Migration in Charlotte — ALEX Intelligence 2026

Charlotte's In-Migration Flat in 2022-23

Top counties sending households show stability, not surge

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THE DATA

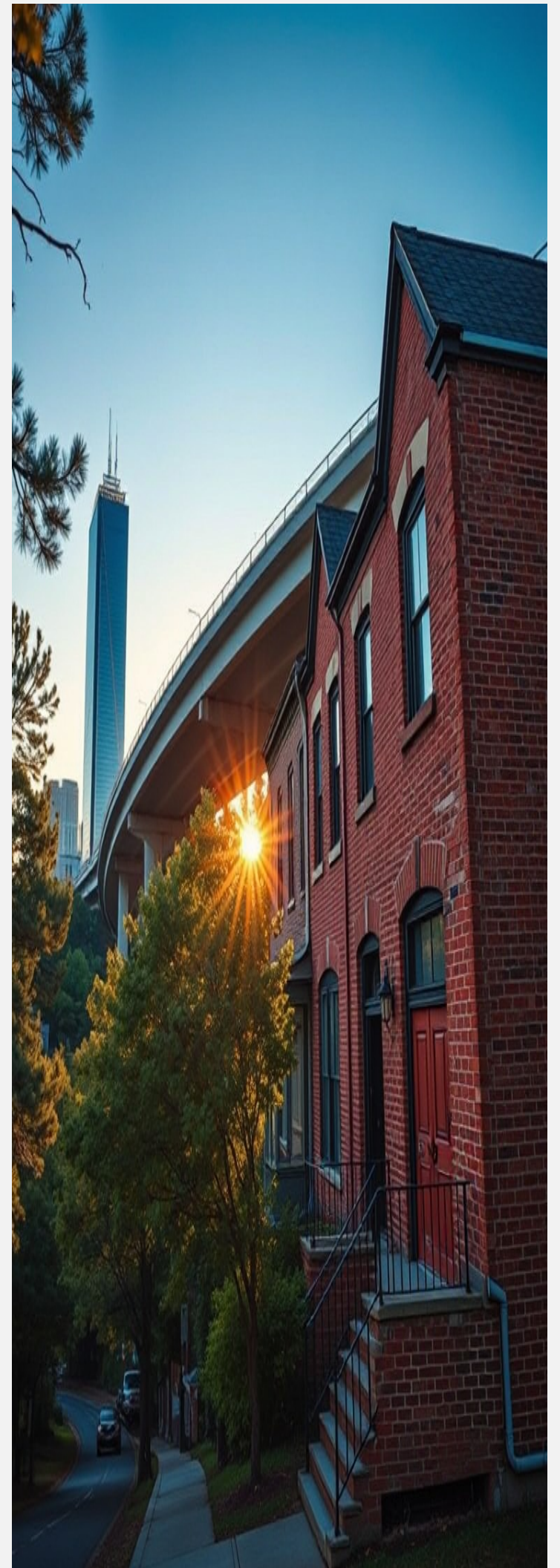
0.2%

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

In-migration to the Charlotte market held roughly flat between 2021-22 and 2022-23.

This minimal change — just 0.2% — signals a market approaching equilibrium. The data, drawn from IRS county-to-county inflows, reflects that while Charlotte remains a magnet for new residents, the pace of growth has stabilized. The absence of a significant uptick suggests that the city has absorbed much of its recent population surge and is now in a phase of consolidation rather than expansion.

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/2026-09-16-charlotte-mig-trend-in-total>



01

Stability Over Surge

The flat in-migration trend contradicts the narrative of relentless growth. It indicates that Charlotte's real estate market is no longer driven by speculative migration or rapid population influx. Instead, it is maturing into a sustainable, self-reinforcing ecosystem where job growth, housing stock, and infrastructure are aligning. This is not stagnation — it's a sign of structural health, where demand is met without overheating.



02

The Hidden Engine of Resilience

While new households aren't arriving faster, the top sending counties — like Catawba and Brunswick — continue to supply steady flows. This suggests that Charlotte's appeal is now rooted in regional economic integration, not just local opportunity. The city is functioning as a regional hub where people from surrounding counties move in for jobs, education, and services, creating a stable, self-sustaining population base rather than a boom-and-bust cycle.

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