

Tennessee Leads Nashville Migration — ALEX Intelligence 2026

Tennessee Drives 28.8% of Nashville's Inbound Migration

The state is the top source of new households — a key engine of growth

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THE DATA

28.8%

Share of Arriving Households From One State (2023)

Tennessee supplies more of the Nashville market's inbound migration than any other state.

This figure represents the share of new households moving into the Nashville metro from within Tennessee itself — a level of internal migration that exceeds even California, Florida, and Texas. The data, drawn from IRS county-to-county inflows (2022–2023), reveals a deep regional self-sustaining growth pattern. This internal migration is not a byproduct of sprawl but a sign of strong local demand and economic magnetism within Middle Tennessee.

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/2026-09-20-nashville-mig-state-leader>

01

Migration Is a Local Power Source

The fact that 28.8% of new arrivals come from within Tennessee suggests that Nashville's growth is not dependent on distant, high-cost inflows — it's being fueled by a regional labor and housing surplus. This internal engine supports affordability, reduces long-distance commuting pressures, and strengthens the economic feedback loop within the metro. The city is not just attracting outsiders — it's retaining and repatriating its own people from surrounding counties like Maury, Dickson, and Rutherford.

02

Affordability Is a Regional Reality

With nearly one in three new residents coming from within the state, Nashville's housing market is being reshaped by intra-state mobility rather than interregional displacement. This internal migration pattern implies that affordability pressures are not solely driven by out-of-state demand but by the movement of existing residents across county lines — often from lower-cost to higher-opportunity areas. This shifts the policy focus: instead of targeting distant buyers, the city should prioritize infrastructure and zoning reforms that accommodate this internal flow without exacerbating congestion or equity gaps.

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