

North Carolina Leads Charlotte Migration — ALEX Intelligence 2026

North Carolina Drives 29.2% of Charlotte's In-Migration

Source: ALEX Intelligence, 2026 — The single largest state origin for new households

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THE DATA

29.2%

Share of Arriving Households From One State (2023)

North Carolina supplies more of the Charlotte market's inbound migration than any other state.

This 29.2% share is not a trend—it is a structural dominance. Unlike markets dependent on distant inflows, Charlotte's growth is anchored in regional mobility. The city is not just attracting outsiders; it is absorbing its own state's population with unprecedented intensity. This internal momentum reduces transaction friction and strengthens long-term housing demand.

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/2026-09-21-charlotte-mig-state-leader>



01

Migration Is a Local Engine

Charlotte's housing market is not being driven by national migration waves but by deep regional integration. When 29.2% of new households come from within North Carolina, the market becomes a destination for people already familiar with the state's culture, infrastructure, and job markets. This reduces the risk of buyer dislocation and increases the likelihood of long-term residency, creating a self-sustaining demand cycle that resists cyclical downturns.



02

The State Is the Market's Foundation

This data reveals a critical truth: Charlotte's real estate success is not accidental but intentional. The city has become the economic and residential hub for North Carolina's intra-state mobility. With over 11,500 new households originating from within the state, the market is not chasing growth—it is harvesting it. This internal demand stream ensures stability even when national interest wanes, making Charlotte uniquely resilient in volatile markets.

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