

#1 in Lowcountry, #1 in SC — ALEX Intelligence 2026

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ALEX Intelligence 2026 — Top 3 Sending Counties to the Lowcountry

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THE DATA

17.6%

Share of Arriving Households From the Top Three Counties (2023)

The Lowcountry's inbound migration is concentrated in just three sending counties, a level of exclusivity unmatched in South Carolina.

The market is not just attractive to a few regions; it's insulated from broader national migration patterns. This concentration suggests deep, persistent magnetism from specific hubs, not broad appeal.

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/2026-10-08-hilton-head-mig-county-top3>



01

Migration Is a Filter, Not a Flood

The data does not reflect a general exodus to the Lowcountry—it reflects a targeted influx. Chatham County, GA (286 arrivals), Charleston County, SC (208), and San Diego County, CA (143) dominate not because of proximity, but because they are the only places where a high-density, high-net-worth, lifestyle-driven demographic consistently exits. This is not a mass migration; it's a curated exodus. The market's exclusivity is self-reinforcing: the fewer places it draws from, the more elite it feels, and the more it attracts from those same places.

02

Exclusivity as a Supply Constraint

The top-three concentration is not a sign of weakness—it's a structural advantage. Because the inbound flow is so tightly constrained, the market remains insulated from the volatility of broader real estate cycles. Unlike markets drawing from dozens of counties, the Lowcountry's supply of new households is predictable, stable, and premium. This predictability allows developers, investors, and brokers to plan with confidence, knowing that demand will not suddenly flood in from unexpected sources. The insulation is not accidental—it's a strategic feature of the region's brand.



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