

#1 in the Triangle, #1 in North Carolina — ALEX Intelligence 2026

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ALEX Intelligence 2026 In-Migration Ranking

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THE DATA

21.4%

Five-Vintage Change in Households Moving In (2023)

The Triangle saw a 21.4% increase in households moving in between 2017-18 and 2022-23, the highest among all U.S. counties with comparable data.

This surge reflects sustained, multi-year migration momentum from within North Carolina and beyond, driven not by short-term speculation but by long-term residential relocation. The data captures the shift of entire households—families, professionals, and retirees—seeking opportunity and quality of life in the Triangle’s growing ecosystem.

Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2017-18 and 2022-23 · ALEX Intelligence computation
<https://alex-companies.com/data/2026-10-10-triangle-mig-trend-in-long>



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01

Migration is a structural force

The 21.4% five-vintage increase is not a cyclical spike but a structural shift in residential patterns. Unlike transient market trends, this data shows that households are relocating to the Triangle with intent, often from other parts of North Carolina—such as Mecklenburg, Guilford, and Orange counties—indicating deepening regional integration.

This internal migration engine is less susceptible to rate volatility than external inflows, creating a resilient demand base that supports long-term appreciation and supply planning.

02

Affordability pressures fuel informal networks

As the Triangle's in-migration intensifies, affordability remains a critical constraint. The Federal Reserve's findings on informal financial support networks reveal that households are increasingly relying on family assistance, shared housing, and co-ownership arrangements to enter the market.

This trend is not a sign of weakness but a strategic adaptation. It underscores that demand is still strong, even if traditional financing paths are blocked—meaning that the real estate market is absorbing pressure through alternative mechanisms, not declining.



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