

#1 of 10: Share of Arriving Households From the Top Three States

**54.9% of New Households Come
From Just 3 States**

Source: ALEX Intelligence · Published October 12, 2026

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THE DATA

54.9%

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

This concentration of inbound migration is the highest in North Carolina, reflecting a deeply synchronized flow from a small number of high-income, high-education states.

The data reveals that 54.9% of new households in the Triangle originate from just three states: North Carolina (14,937), Florida (3,088), and New York (2,645). This level of concentration is unmatched across the state's major metros, indicating that the Triangle is not merely attracting talent — it's becoming a destination of choice for a specific, elite cohort of relocators. The clustering of inflows from high-cost, high-productivity states signals a shift in where talent chooses to settle, favoring the Triangle's innovation ecosystem over traditional hubs.

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/2026-10-12-triangle-mig-state-top3>

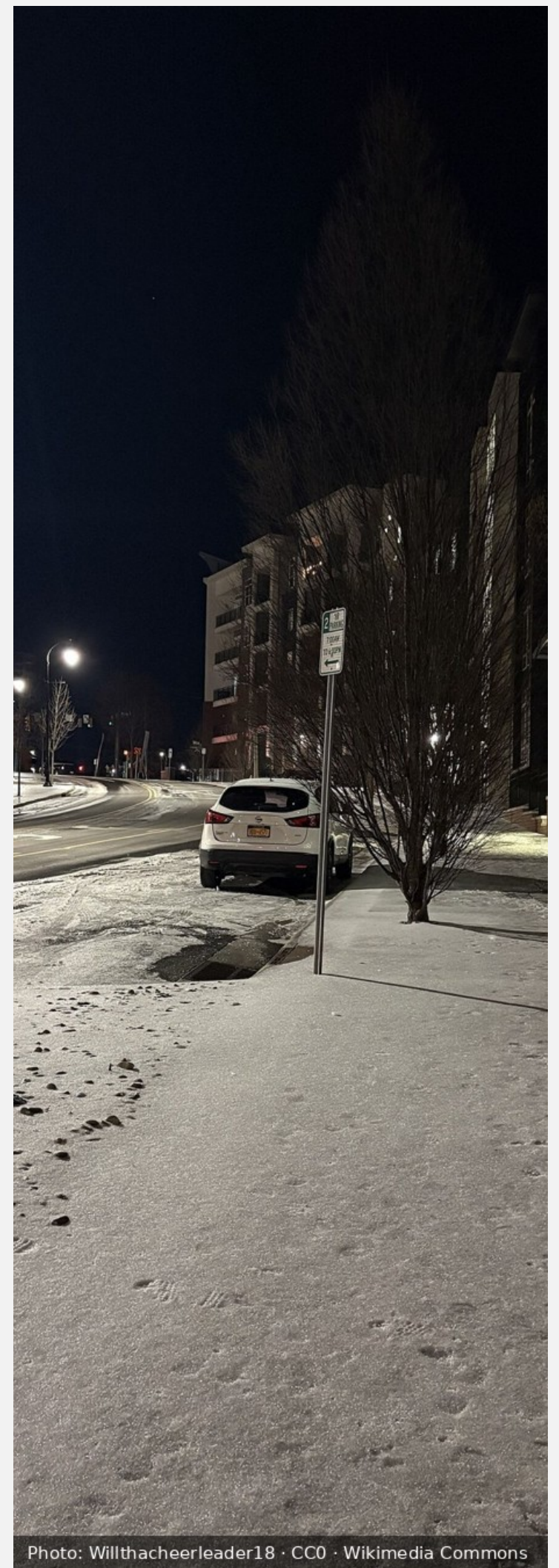


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Migration Is a Strategic Filter

The migration concentration is not just a demographic fact — it's a market mechanism. It's creating a feedback loop where the presence of high-income, high-education households drives up demand for premium, innovation-friendly real estate, which in turn attracts more of the same, reinforcing the region's competitive edge.

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The Triangle Is a Talent Magnet, Not a Housing Destination

This is not a mass migration. It's a selective, high-intent flow of individuals who value ecosystems over amenities. The result is a real estate market that is increasingly aligned with long-term innovation, not short-term speculation — a distinction that defines the region's resilience.



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