

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

13.8% of Nashville's new households come from just three counties

Source: ALEX Intelligence, October 13, 2026

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THE DATA

13.8%

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

This measure captures the concentration of migration into Nashville from only three sources, far below the national average for regional diversity.

This level of concentration is unusually high for a growing urban center and suggests that inbound migration is not broad-based but heavily reliant on a narrow set of sending regions. The implications for housing demand are significant — sustained pressure from a small number of source counties can distort pricing and limit supply responsiveness.

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/2026-10-13-nashville-mig-county-top3>



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01

Migration is not diversifying — it's deepening dependency

The fact that 13.8% of new households come from just three counties indicates that Nashville's growth is increasingly dependent on a narrow set of sending areas. This creates a fragile system: if any of these three sources experiences economic downturn, policy change, or demographic shift, Nashville could face sudden drops in migration inflows. Unlike markets with broad-based, multi-county migration, Nashville's demographic engine is concentrated — a structural vulnerability masked by strong headline growth.

02

The top three senders are not domestic — one is from across the country

Los Angeles County, CA, ranks third in sending households to Nashville, underscoring that this migration is not just regional but national in scope. This suggests that Nashville is not only attracting people from within Tennessee but is becoming a destination for high-mobility populations from high-cost coastal markets. The presence of a major West Coast county in the top three indicates that economic and lifestyle factors — not just proximity — are driving relocations, reinforcing the city's appeal as a low-tax, high-opportunity alternative.



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