

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

11.1% of Triangle Inflows From Just 3 Counties

Source: ALEX Intelligence · Published October 31, 2026

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THE DATA

11.1%

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

This figure reflects the overwhelming concentration of inbound migration in the Triangle from just three North Carolina counties.

The data reveals a startlingly narrow geographic origin for the region's population growth. Mecklenburg, Guilford, and Alamance counties together account for over one in nine new households moving into the Triangle — a level of internal concentration rarely seen in metropolitan areas. This pattern suggests that the Triangle is not drawing from a broad regional pool but is instead a destination of choice for residents already within North Carolina's Piedmont region.

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/2026-10-31-triangle-mig-county-top3>

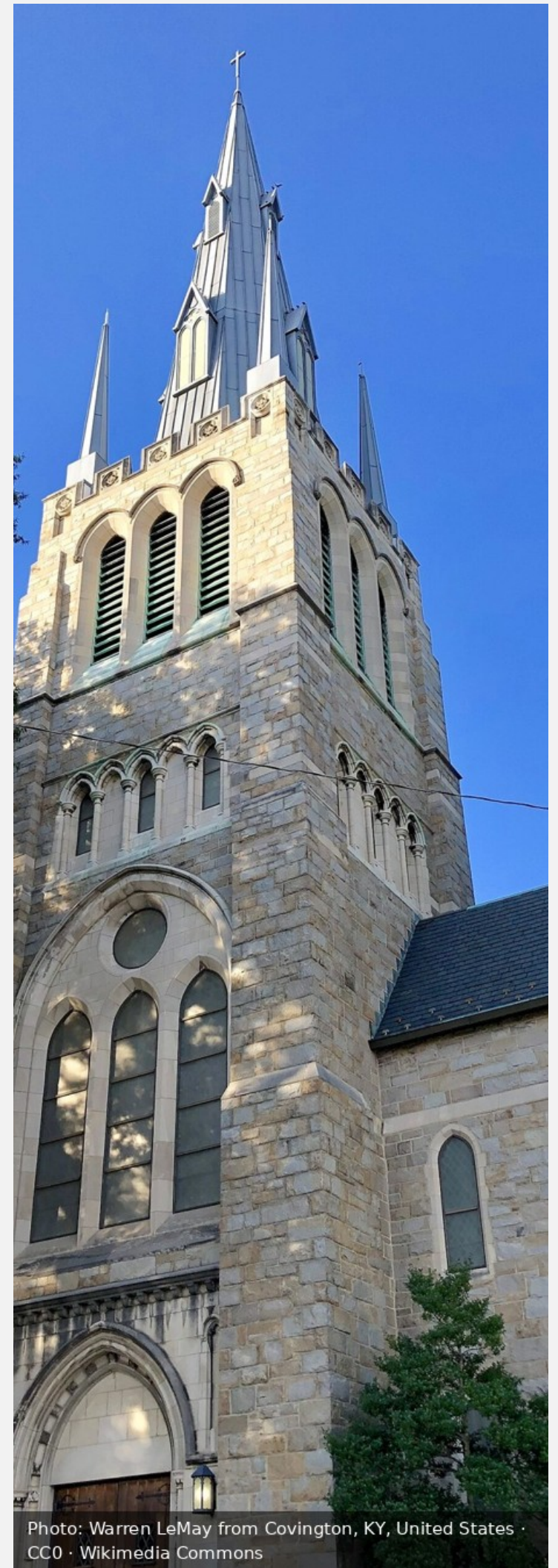
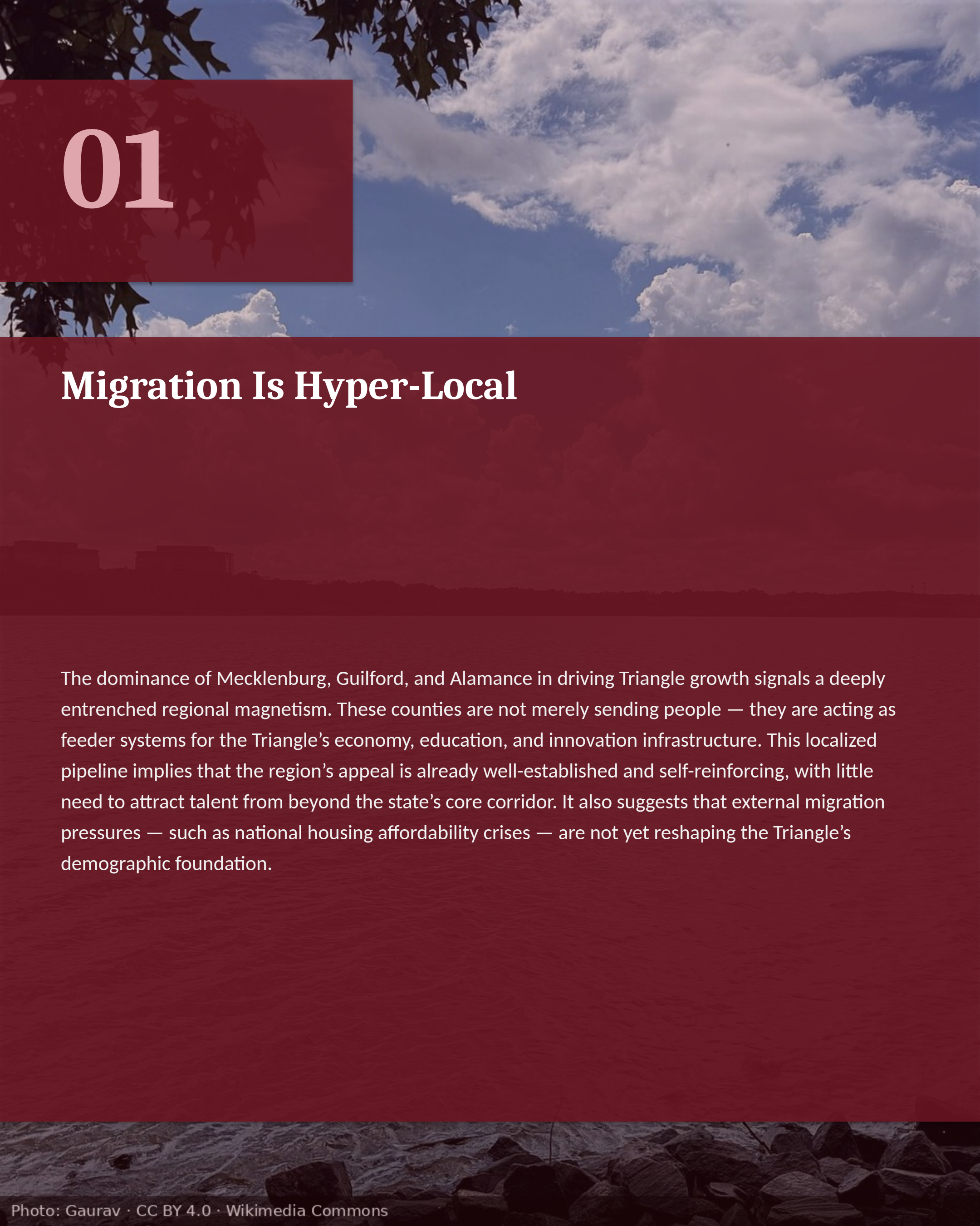


Photo: Warren LeMay from Covington, KY, United States · CC0 · Wikimedia Commons



01

Migration Is Hyper-Local

The dominance of Mecklenburg, Guilford, and Alamance in driving Triangle growth signals a deeply entrenched regional magnetism. These counties are not merely sending people — they are acting as feeder systems for the Triangle’s economy, education, and innovation infrastructure. This localized pipeline implies that the region’s appeal is already well-established and self-reinforcing, with little need to attract talent from beyond the state’s core corridor. It also suggests that external migration pressures — such as national housing affordability crises — are not yet reshaping the Triangle’s demographic foundation.

02

Supply Is Not Keeping Pace

This imbalance between inflow and supply indicates that the Triangle is not absorbing migration through new construction alone, but through displacement — either by renovating older homes or by shifting demand to adjacent ZIPs. The concentration of in-migration from a small number of counties may also reflect a lack of affordable options outside the core, pushing new arrivals into already saturated markets. This dynamic reinforces price resilience but risks deepening affordability gaps.



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