the Lowcountry — #1 of 10: Year-Over-Year Change in Households Moving In

Hilton Head's In-Migration Fell 4.4% YoY

the Lowcountry · U.S. Internal Revenue Service 2023

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THE DATA

4.4%

Year-Over-Year Change in Households Moving In (2023)

The Lowcountry saw a decline in in-migration between 2021-22 and 2022-23, with Hilton Head's flow falling relative to peer counties.

This 4.4% year-over-year decrease in household inflows marks a reversal from earlier growth trends, signaling a possible market saturation point for high-end coastal migration. The data, drawn from IRS county-to-county migration flows, reflects a real shift in movement patterns—not just a dip in volume. This is not a sign of weakness, but of maturation.

Source: U.S. Internal Revenue Service, Statistics of Income Migration Data, county-to-county inflows, 2021-22 and 2022-23 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-05-hilton-head-mig-trend-in-total

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Migration is cooling, not collapsing

The data from the IRS migration dataset shows that even as flows decline, the absolute number of households still moving in remains substantial. The decline is relative, not absolute, and it suggests that the market is now more selective, favoring high-income, long-term investors and remote workers who can afford the premium pricing.

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Resilience is now defined by retention

In a market where new household inflows are declining, properties that support long-term residency—through strong schools, healthcare access, and civic engagement—become more valuable. The decline in migration isn’t a threat; it’s a signal that the market is evolving toward sustainability over expansion. The most resilient properties are those that serve as anchors, not just destinations.

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