

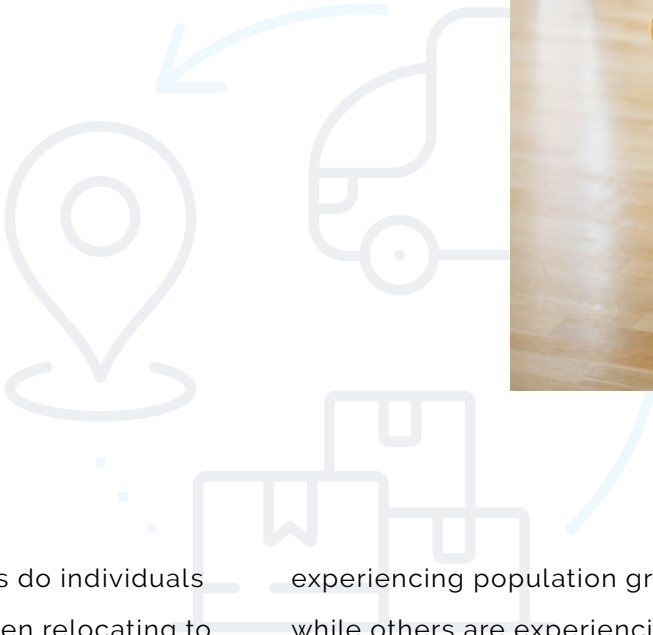


The State of U.S. Population Movement

A 2023 research report examining the impact of various factors on population movement trends in the United States.

INTRODUCTION

Where Are People Moving to in 2023?



What factors do individuals consider when relocating to a new area? Is it a lower cost of living, new employment, or an abundance of dining and entertainment options? Or is it a combination of all of the above? By augmenting population distribution data with census data about the local population size, income, and property prices, we can begin to understand why some areas of the country are

experiencing population growth while others are experiencing population loss.

COVID-19 ushered in substantial and probably permanent changes to how consumers live and work. Work-from-home policies, for instance, have become widespread across industries. Some workers may have decided to relocate because they were no longer required to reside near their workplace. Others may

have found new employment (or professions) in a different region of the country or simply decided to retire. In any case, there have been significant changes in the population distribution of the United States over the last three years.

Our Methodology



This report looks at how the population of the United States has changed between Q1 2020 and Q1 2023. To determine population distribution, it utilizes mobile device signals observed in every county across the nation. A device is recorded in a state or county when the vast majority of its associated signals are present in that

state or county. The number of unique devices observed in a state or county is then divided by the total number of unique devices to determine the proportion of total devices in that state or county.

Changes in population distribution are then determined by calculating the difference between the proportion of

unique devices observed in a region. The report reflects unique devices observed over a 3-year period, beginning January 1, 2020, and ending March 31, 2023. Of note, Gravy Analytics processes more than 60 billion location signals from consumer mobile devices every day.

Top Gaining (and Losing) Counties

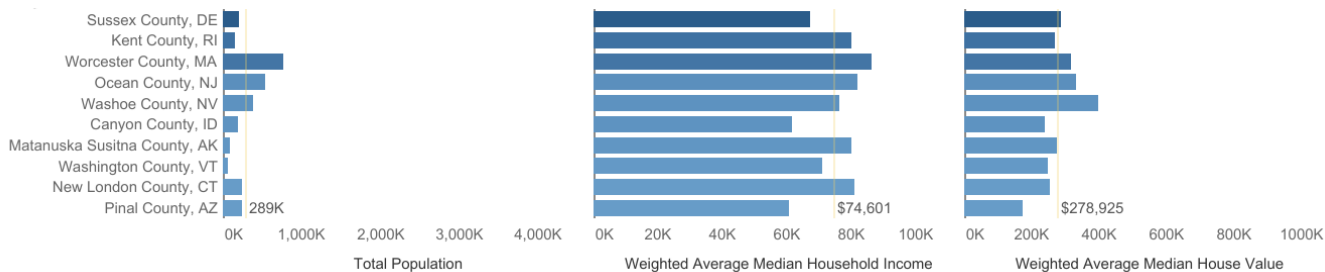
Sussex County, Delaware has seen its population increase more than any other county in the U.S. Located in the southern part of Delaware, on the Delmarva Peninsula, the county includes popular beach towns like Lewes and Rehoboth Beach. At the other end of the spectrum is Cook County, IL, home to the city

of Chicago, which saw its population decline more than any other county.

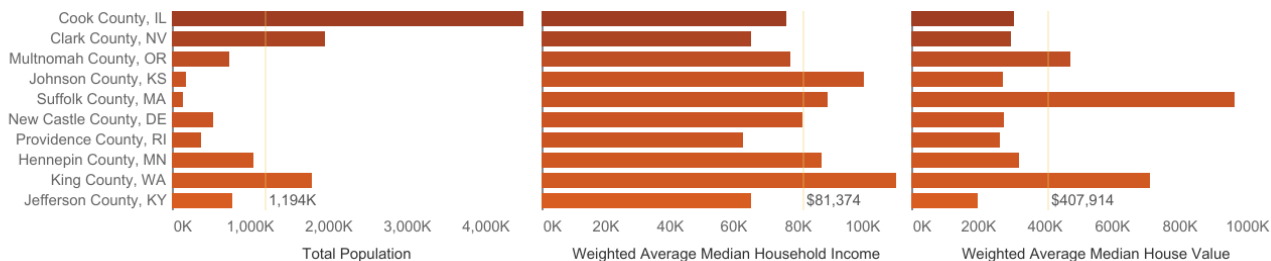
Comparing the ten counties that gained the most population with those that lost the most, some clear patterns emerge. Consumers overwhelmingly moved to smaller markets with a lower average cost

of housing. Gaining counties boast a median house value of \$279K, about 38% lower than the median house value in losing counties. At the same time, median household income was just 9% lower, suggesting that consumers seek to move to areas of the country where they can still earn a living but have their dollars stretch further.

Top 10 Gaining Counties



Top 10 Losing Counties

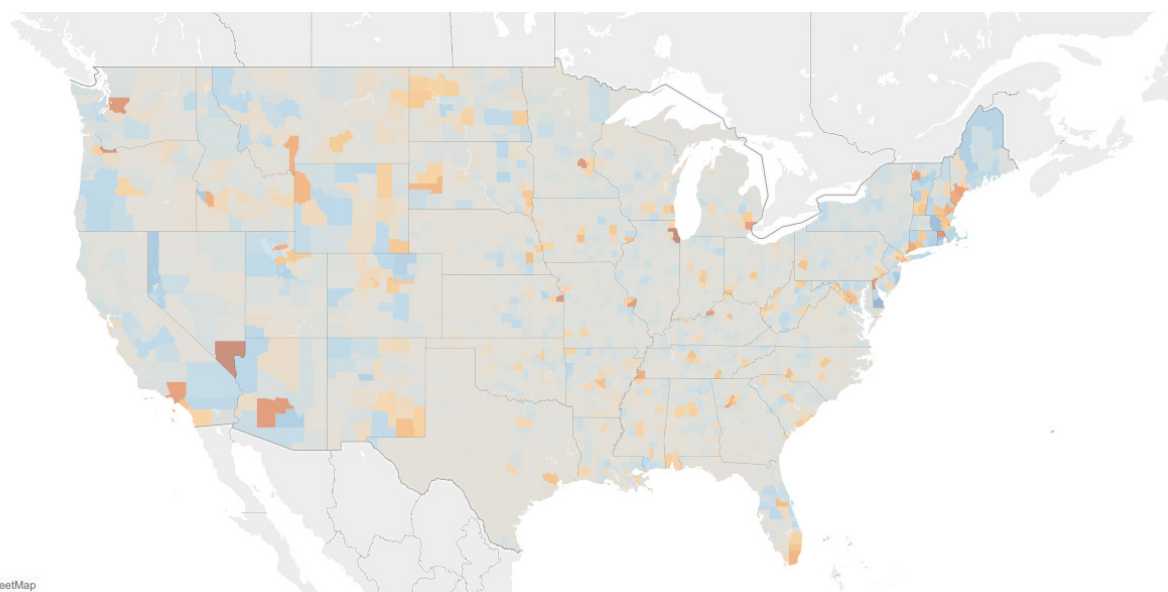


A Closer Look at U.S. State Movement Trends

We've noticed that moving trends vary by state, so we took a closer look at the country's ten biggest states to see what we could determine about consumer preferences based on where and how the state's population has chosen to relocate.

While this report includes data and analysis for the ten most populous states, the [complete data is available online](#) for all 50 states; visit us at gravyanalytics.com to learn more.

Population Distribution by State: Q1 2023 compared to Q1 2020



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10. Michigan

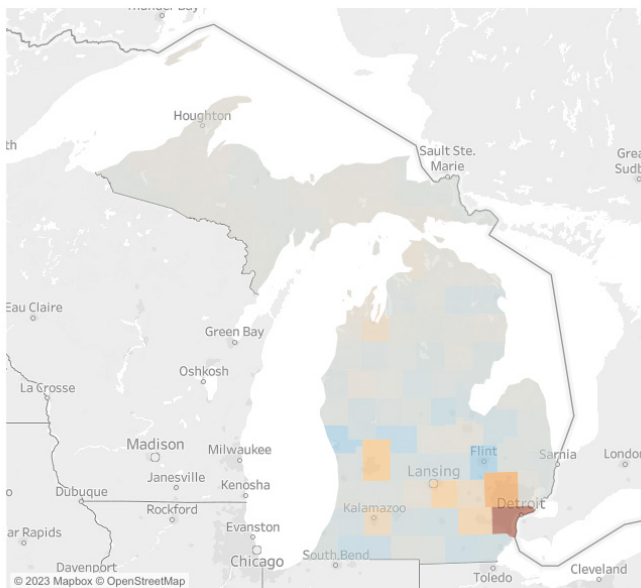


Michigan saw its largest population shifts in Genesee County, which gained population, and Wayne County, which lost population. While Genesee County is home to less than a third of the population of Wayne County, its median household income is slightly higher and its median house value is just slightly lower.

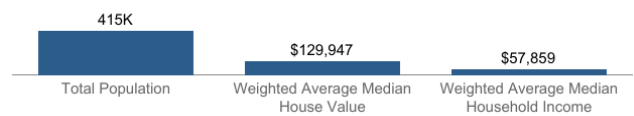
Wayne County is home to the city of Detroit, but unlike some metro areas in other states, the adjacent Oakland and Washtenaw counties also saw population declines. While Genesee County is home to the city of Flint, most of Michigan's population growth seems to have happened in more rural areas. The county with the second-

highest population growth, Muskegon County, for example, borders Lake Michigan, and its county seat, Muskegon, is a popular vacation spot.

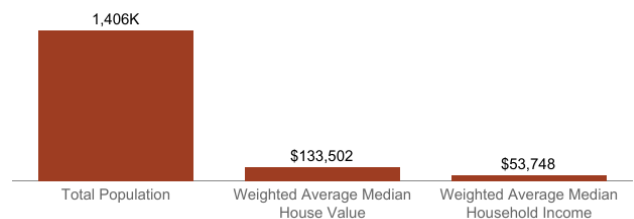
Change by County: Q1 2023 compared to Q1 2020



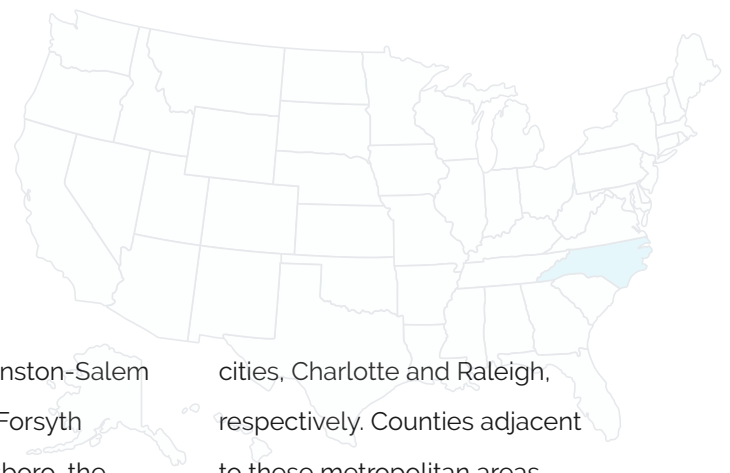
Top Gaining County: Genesee County, MI



Top Losing County: Wayne County, MI



9. North Carolina

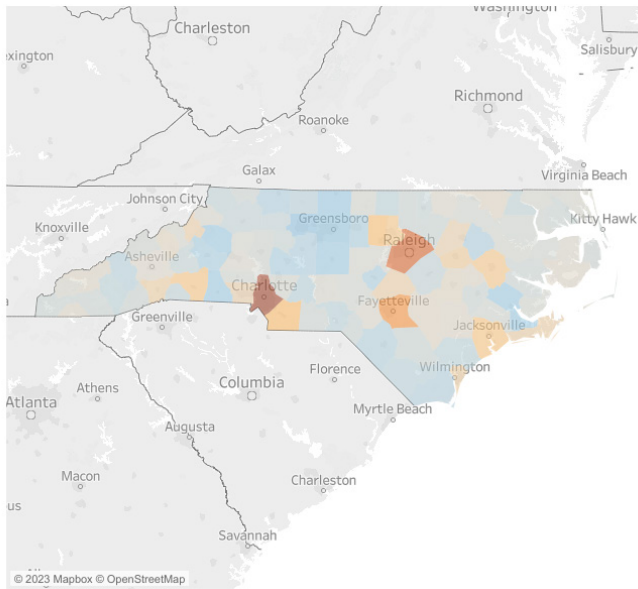


Guilford County and Forsyth County, both located in the Piedmont Triad, a region in the north-central part of the state that is home to the cities of Greensboro, Winston-Salem, and High Point, experienced the greatest population growth in North Carolina

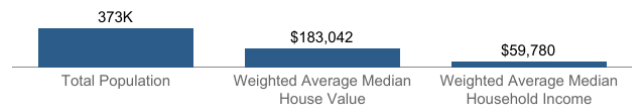
during the period. Winston-Salem is the county seat of Forsyth County, while Greensboro, the state's third-largest city, is the county seat of Guilford County. Losing population were Mecklenburg and Wake counties, home to the state's two largest

cities, Charlotte and Raleigh, respectively. Counties adjacent to these metropolitan areas, including Union, Durham, and Orange, also saw their respective populations decline.

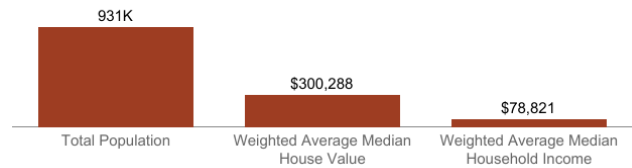
Change by County: Q1 2023 compared to Q1 2020



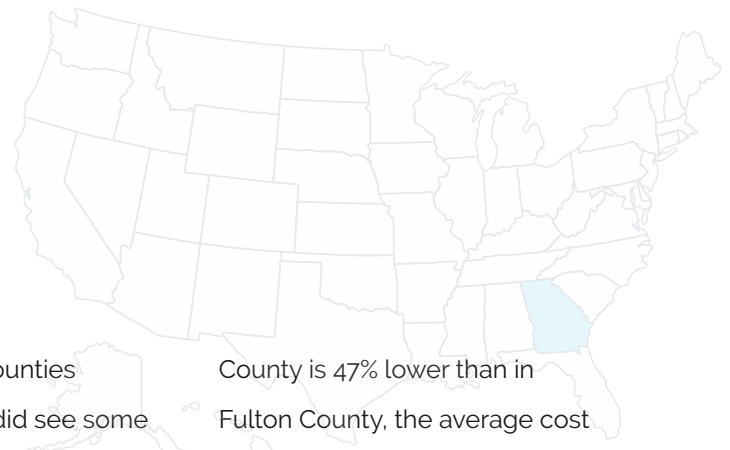
Top Gaining County: Forsyth County, NC



Top Losing County: Mecklenburg County, NC



8. Georgia

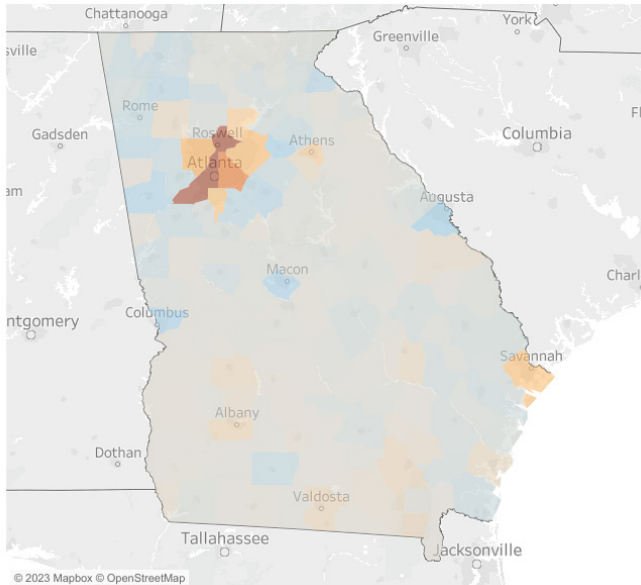


Residents of Georgia overwhelmingly left the Atlanta area for smaller metropolitan areas. Fulton County, which contains about 90% of the city of Atlanta, and DeKalb County, which contains the other 10% of the city, saw the largest drops in population during the period.

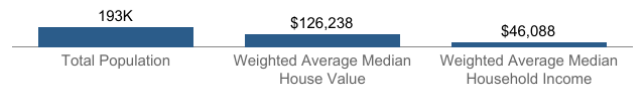
While the exurban counties surrounding Atlanta did see some population growth, the biggest jumps happened in Forsyth and Muscogee counties, which are home to the smaller Georgia cities of Augusta and Columbus, respectively. Although the average household income in Forsyth

County is 47% lower than in Fulton County, the average cost of housing is almost 66% lower, suggesting that Forsyth County still affords its residents a better standard of living overall.

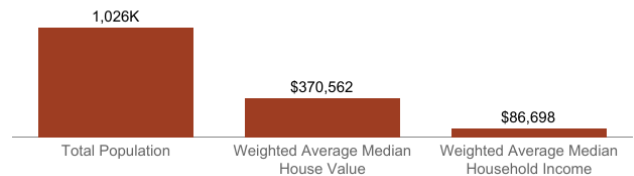
Change by County: Q1 2023 compared to Q1 2020



Top Gaining County: Richmond County, GA



Top Losing County: Fulton County, GA



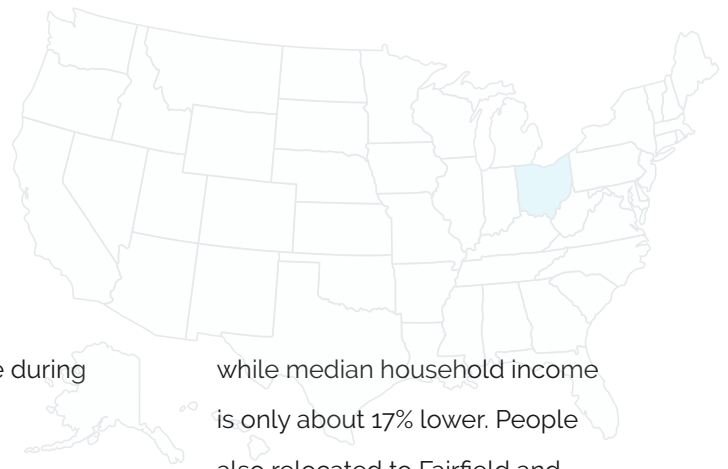
7. Ohio

In Ohio, people moved away from Hamilton County, part of the Cincinnati metropolitan area, and Franklin County, home to the state capital and largest city, Columbus. Cuyahoga County, where the state's second-largest city, Cleveland, is located, also saw

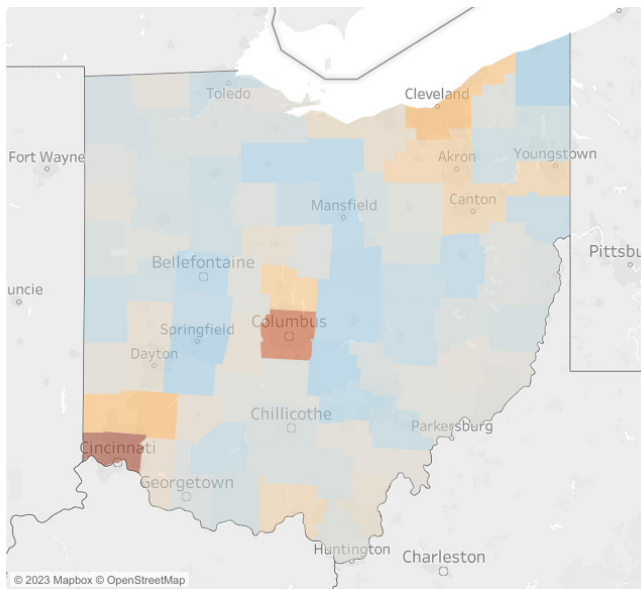
its population decline during the period.

Clark County, located in west-central Ohio between Cincinnati and Columbus, saw its population increase, however. Compared to Hamilton County, median home values are a healthy 38% lower,

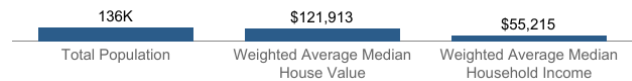
while median household income is only about 17% lower. People also relocated to Fairfield and Ashtabula counties, located on the outskirts of Columbus and Cleveland, respectively.



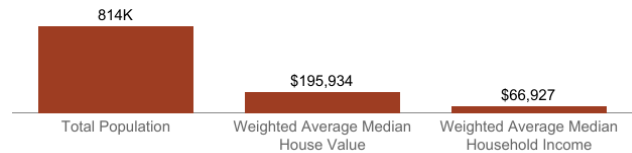
Change by County: Q1 2023 compared to Q1 2020



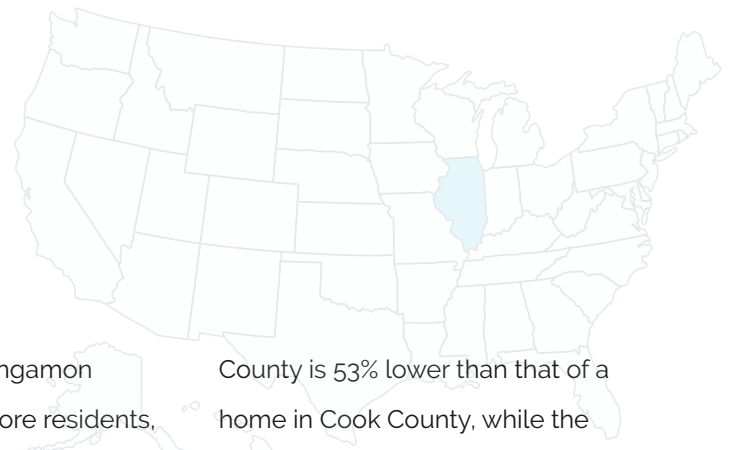
Top Gaining County: Clark County, OH



Top Losing County: Hamilton County, OH



6. Illinois

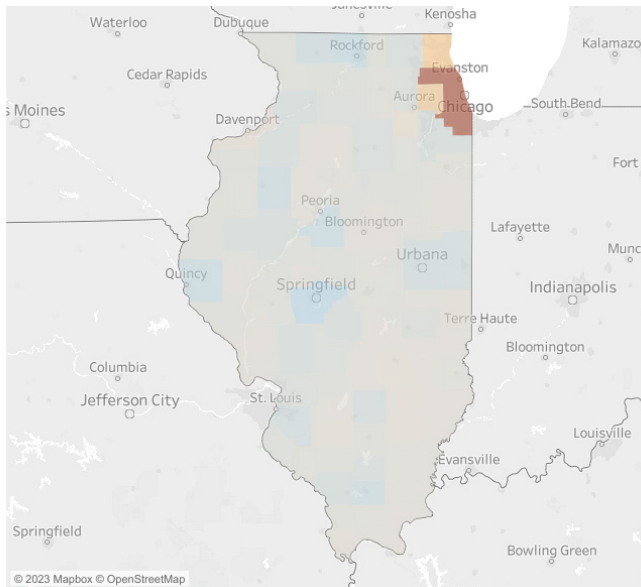


Cook County in Illinois, home to the city of Chicago, lost more of its population between Q1 2020 and Q1 2023 than any other county in the country. The adjacent counties of Lake and DuPage also lost population during the period.

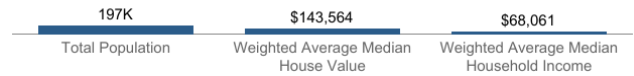
At the same time, Sangamon County welcomed more residents, perhaps drawn by the advantages of living closer to the state capital of Springfield and the lower cost of housing. The median house value of a home in Sangamon

County is 53% lower than that of a home in Cook County, while the median household income is only 11% lower.

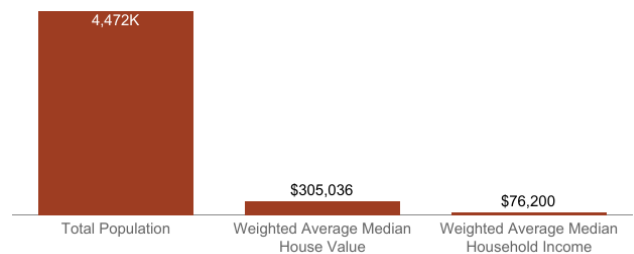
Change by County: Q1 2023 compared to Q1 2020



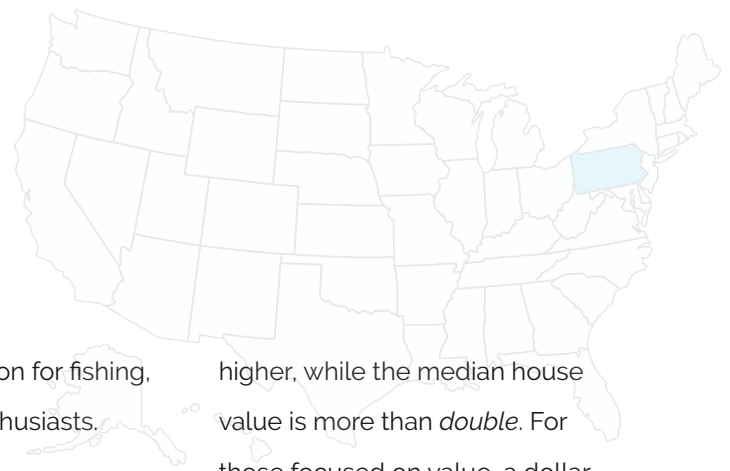
Top Gaining County: Sangamon County, IL



Top Losing County: Cook County, IL



5. Pennsylvania

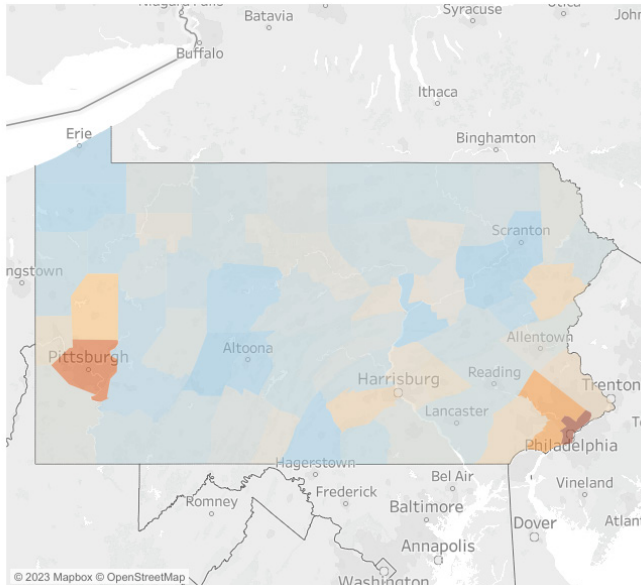


Residents of Pennsylvania overwhelmingly left the Philadelphia and Pittsburgh metro areas in favor of smaller cities like Altoona and Scranton. Cambria County, west of Altoona, saw its population increase more than any other county. Known for its outdoor activities, Cambria County

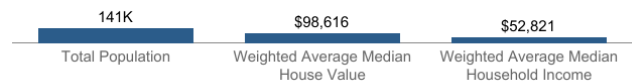
is a popular destination for fishing, hiking, and skiing enthusiasts. Philadelphia County, Pennsylvania, lost more of its population than any other county in the state. Compared to Cambria County, the median household income in Philadelphia County is just 4%

higher, while the median house value is more than *double*. For those focused on value, a dollar clearly stretches much further in Cambria County than it does in the Philadelphia area.

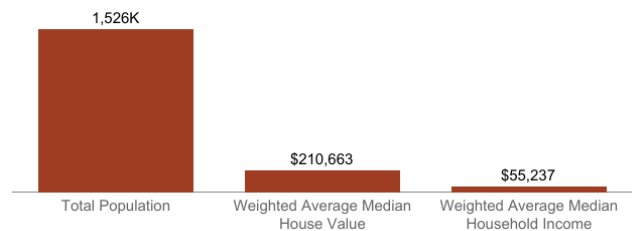
Change by County: Q1 2023 compared to Q1 2020



Top Gaining County: Cambria County, PA



Top Losing County: Philadelphia County, PA



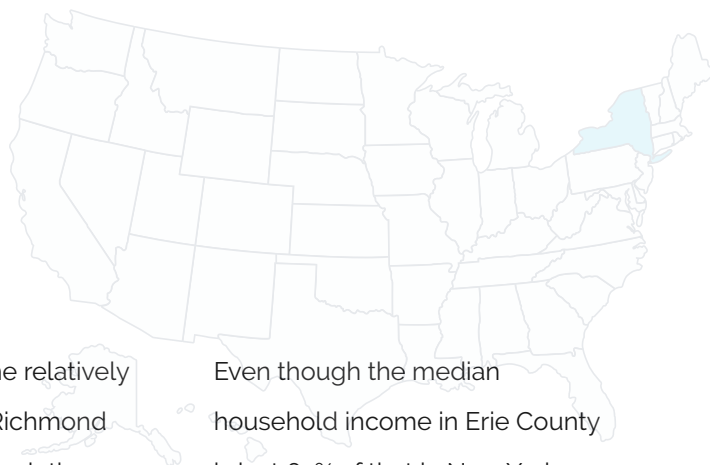
4. New York

In New York State, residents overwhelmingly moved away from the New York City metropolitan area in favor of places in western and central New York. New York County, Kings County, Queens County, Bronx County, and Nassau County registered the biggest population losses. Is living near New York City no longer worth

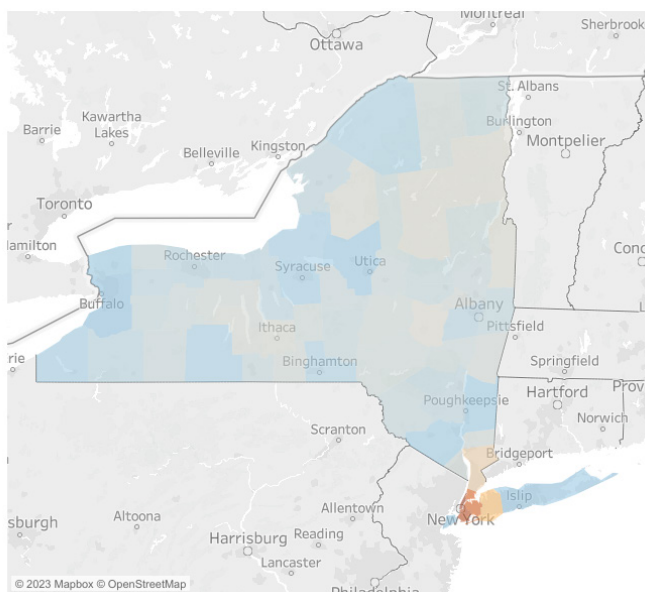
it? Not necessarily. The relatively close-in Suffolk and Richmond counties saw their populations increase between Q1 2020 and Q1 2023.

At the opposite end of the state, however, Erie County, home to the city of Buffalo, saw its population increase more than any other.

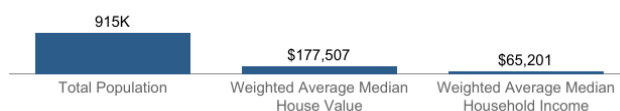
Even though the median household income in Erie County is just 62% of that in New York County, the median house value is just under \$180K, *less than one-fifth* of what it is in Manhattan. With such a reasonable cost of housing, residents of Erie County can still live comfortably on a lower salary.



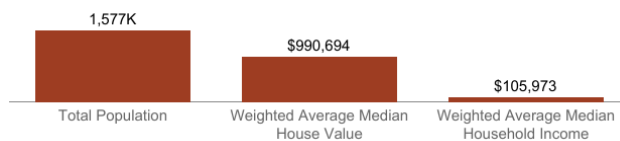
Change by County: Q1 2023 compared to Q1 2020



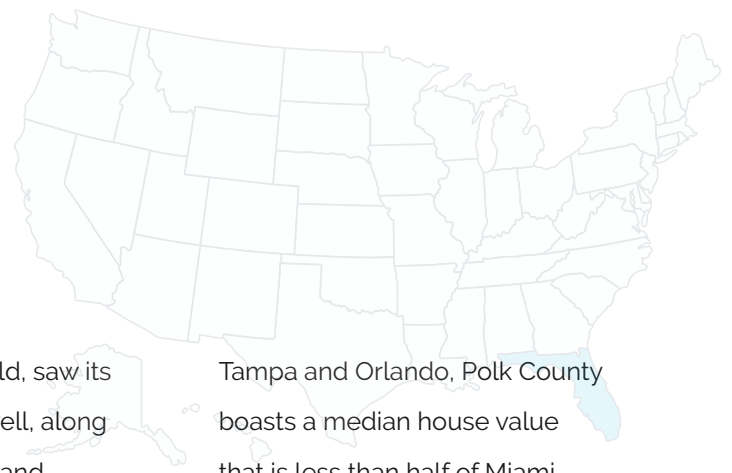
Top Gaining County: Erie County, NY



Top Losing County: New York County, NY



3. Florida



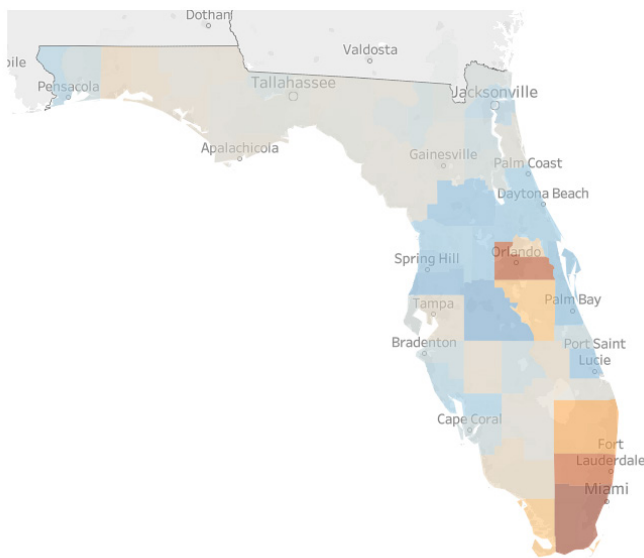
Much of South Florida has seen its population decline. Between Q1 2020 and Q1 2023, Miami-Dade County in Florida lost more residents than any other county in the state. Fort Lauderdale's Broward County and Palm Beach County also saw population declines. Further north, Orange County, which includes Orlando

and Walt Disney World, saw its population drop as well, along with nearby Osceola and Seminole counties.

Both Polk and Marion counties, on the edge of the Orlando metro area, gained population, however, with Polk County taking the top spot. Positioned halfway between

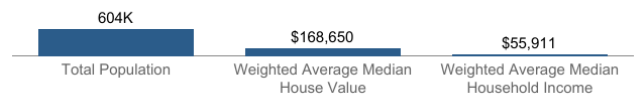
Tampa and Orlando, Polk County boasts a median house value that is less than half of Miami-Dade's \$357K. Coastal counties a bit further north, like Pasco, Brevard, and Saint Lucie, have also welcomed more residents in recent years.

Change by County: Q1 2023 compared to Q1 2020

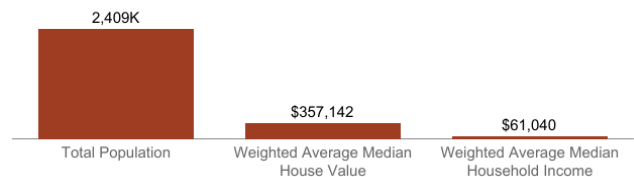


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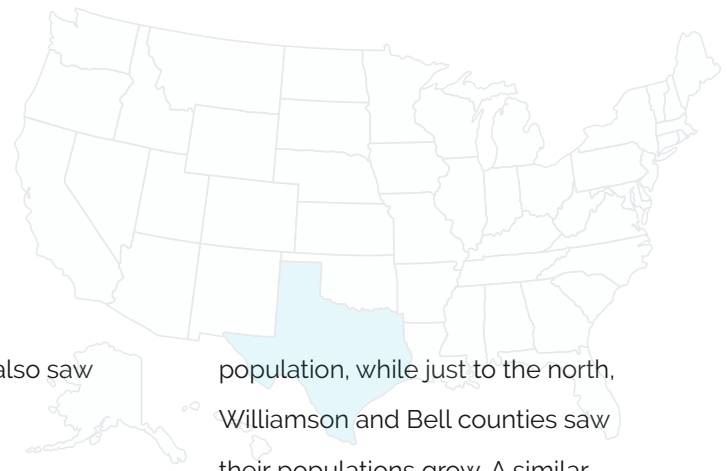
Top Gaining County: Polk County, FL



Top Losing County: Miami-Dade County, FL



2. Texas

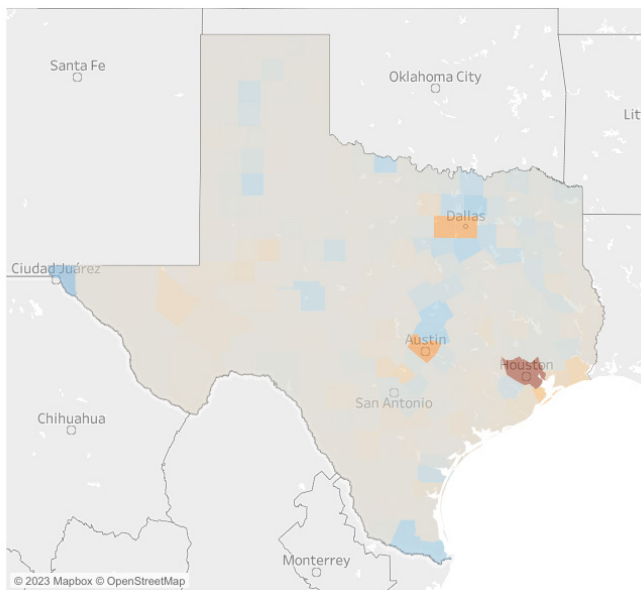


El Paso County, at the western edge of the state, is home to Texas's 6th largest city, El Paso, and borders both New Mexico and the country of Mexico. Between Q1 2020 and Q1 2023, its population increased more than any other county in Texas. Cameron and Hidalgo counties, adjacent to the Gulf of Mexico and along

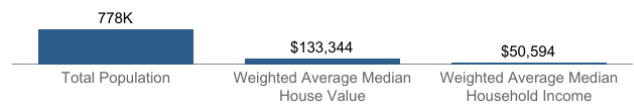
the Mexican border, also saw population growth. Harris County, where the city of Houston is located, lost more of its population between Q1 2020 and Q1 2023 than any other area in the state of Texas. In the Austin area, Travis County placed second among counties losing

population, while just to the north, Williamson and Bell counties saw their populations grow. A similar story played out in the Dallas area, where both Tarrant and Dallas counties saw population declines, but nearby Collin County placed second among the counties that gained residents.

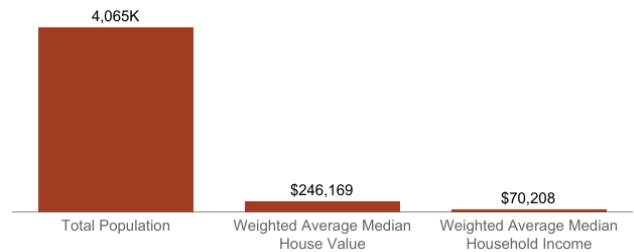
Change by County: Q1 2023 compared to Q1 2020



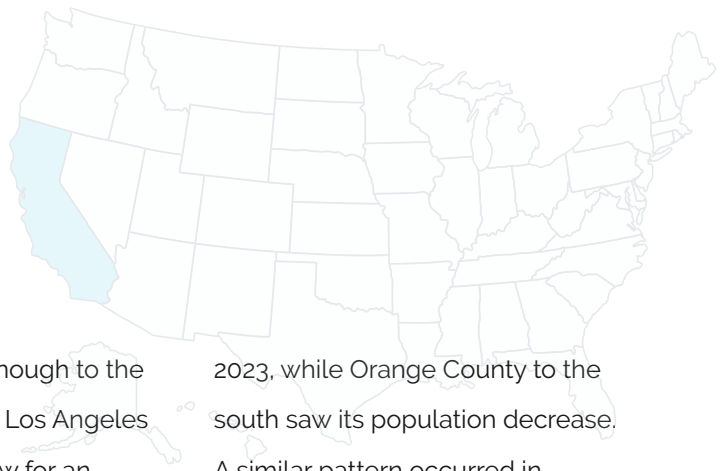
Top Gaining County: El Paso County, TX



Top Losing County: Harris County, TX



1. California



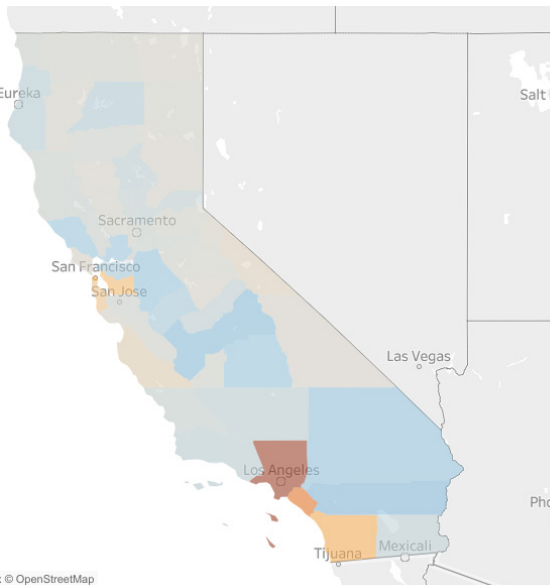
In California, residents left the high cost of housing in Los Angeles County behind in favor of Riverside County, where the median house value is almost 48% lower but the median household income is only a few *hundred* dollars lower. Adjacent to the southeast corner of Los Angeles County, Riverside

County is still close enough to the metropolitan areas of Los Angeles and San Diego to allow for an occasional commute into the city.

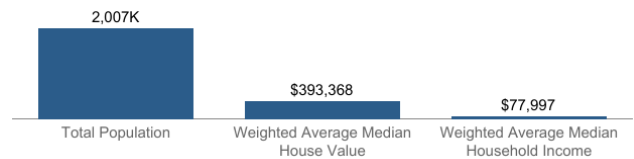
In southern California, San Bernardino County, just east of Los Angeles County, also saw strong growth between Q1 2020 and Q1

2023, while Orange County to the south saw its population decrease. A similar pattern occurred in northern California, with the more urban San Francisco and Alameda counties losing population while the inland counties of San Joaquin and Stanislaus gained population.

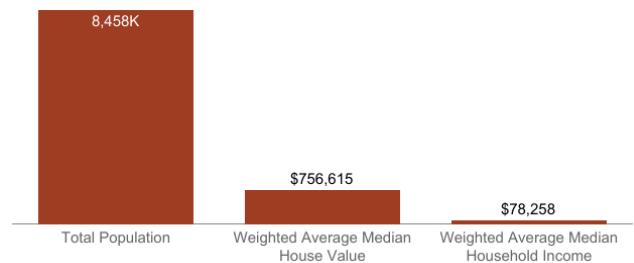
Change by County: Q1 2023 compared to Q1 2020



Top Gaining County: Riverside County, CA



Top Losing County: Los Angeles County, CA



5 Key Population Movement Trends



What can we learn from how and where consumers have moved over the last three years? While each area of the country has its own trends, there are a few key movement patterns that we've noticed. Here are the 5 trends that are influencing the most consumer moves in 2023:

1. Lower cost of housing continues to drive population growth

The population continues to shift toward areas of the country that offer their residents a lower cost of housing. With housing in many markets increasingly out of reach for new and first-time homebuyers, despite having good salaries, consumers are increasingly moving away from high-priced real estate centers to smaller markets where it's still possible to find a home for less than \$300,000.

2. People want to vacation every day, instead of once a year

Whether it's the opportunity to enjoy more weekend hikes in the mountains or to wake up to a lakeside sunrise, people are moving to areas that were once thought of as vacation spots. Popular vacation destinations, including Rehoboth Beach in Delaware, the many beaches of Brevard County, Florida, and Muskegon, Michigan, are found in many of the places that are leading in population growth.



3. Some folks still need to commute - at least occasionally

In several states, consumers moved away from more urban centers to the exurbs a county or two away. This suggests that commuting patterns have shifted, perhaps permanently. With more people now working remotely or returning to the office on a hybrid schedule, it could be that people don't mind driving an hour or two for an in-person meeting. Whatever the cause, more people are now willing to live further from work, trading the convenience of city living and a short commute for more space and a lower-cost lifestyle.

4. Small(er) cities may be the new, hot housing markets

The high cost of housing in many markets, coupled with a new openness to remote work, has created the perfect environment for secondary cities to thrive. Smaller cities still offer residents a plethora of local shops, restaurants, and events to enjoy, but without the hefty price tag. Big city excitement that fits almost any budget? Sign us up!

5. An influx of new residents may reinvigorate local economies

It's clear that people are relocating to more affordable areas, but it's unclear whether relocating will actually result in reduced salaries for those that move, especially among professionals. We think that many areas will see an increase in median household income as a result of these population shifts. For local businesses, this could mean increased revenue and new opportunities, reinvigorating growth in smaller city economies. On the flip side, what will this mean for the country's largest metro areas, many of which have lost population in recent years? Only time will tell.

About Gravy Analytics

Where people go and why tells the story of our world. Founded in 2011, Gravy Analytics is the enterprise location technology company providing actionable intelligence to businesses. Using its patented technology, the company brings data about people, places, and events together to understand human mobility, helping companies enhance their sales and marketing strategies and optimize business operations. Today, the company's intelligence powers leading-edge solutions for a wide range of industries—from advertising to market research, financial services to supply chain risk management—that rely on knowing how people, products, and materials move throughout the world. For more information, please visit gravyanalytics.com.