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# United States Migration Report

Q1 2021

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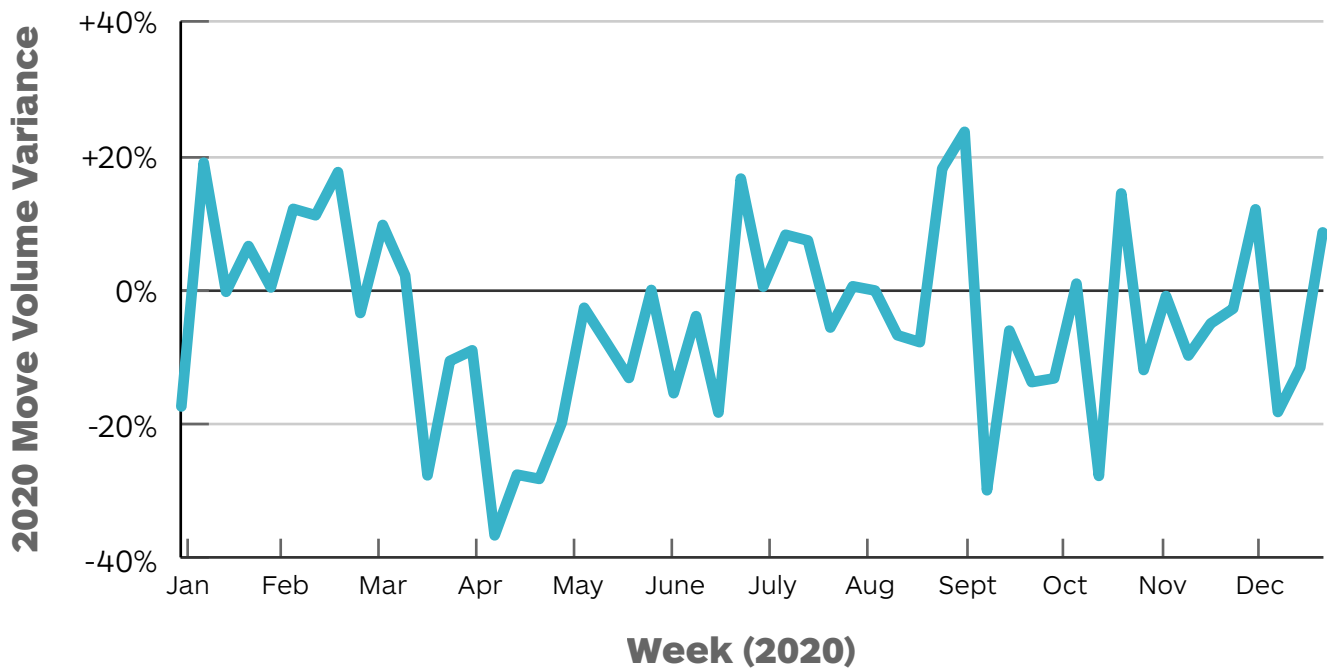
# Looking Back

## MOVING IN 2020

**2020 was an unusual year for all industries including the moving industry.** Like most industries, the onset of the pandemic paused traditional moving trends. The slow in COVID cases in the summer allowed the industry to return to a more traditional level. Interestingly, the pandemic became a moment when people made life changes with more people fleeing expensive, densely populated large cities and heading to more expansive, less expensive, year-round warm weather locations.

### Updater Move Volume v. Seasonality-Expected Levels

In 2020, Americans were on the move, but Updater’s unique data set showed that migration volume ebbed and flowed as the pandemic ebbed and flowed. The below chart compares Updater’s Actual Move Volume to the volume Updater expected based on years prior and the seasonality of relocation.



# Looking Back

## MOVING IN 2020

### Key Insights

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- 2020 began with higher-than-expected move volume, but plummeted in March as Americans paused moving at the onset of the pandemic. As most U.S. states issued shelter-in-place orders, the relocation industry pivoted business practices to handle a highly-contagious environment.
- During the early summer months, move volume ticked up slightly compared to the spring, but still remained at lower-than-expected volume.
- Move volume reached expected summer moving levels in the third quarter, as many states loosened pandemic restrictions.
- During the fourth quarter, move volume leveled off, akin to what is expected in a non-pandemic year.

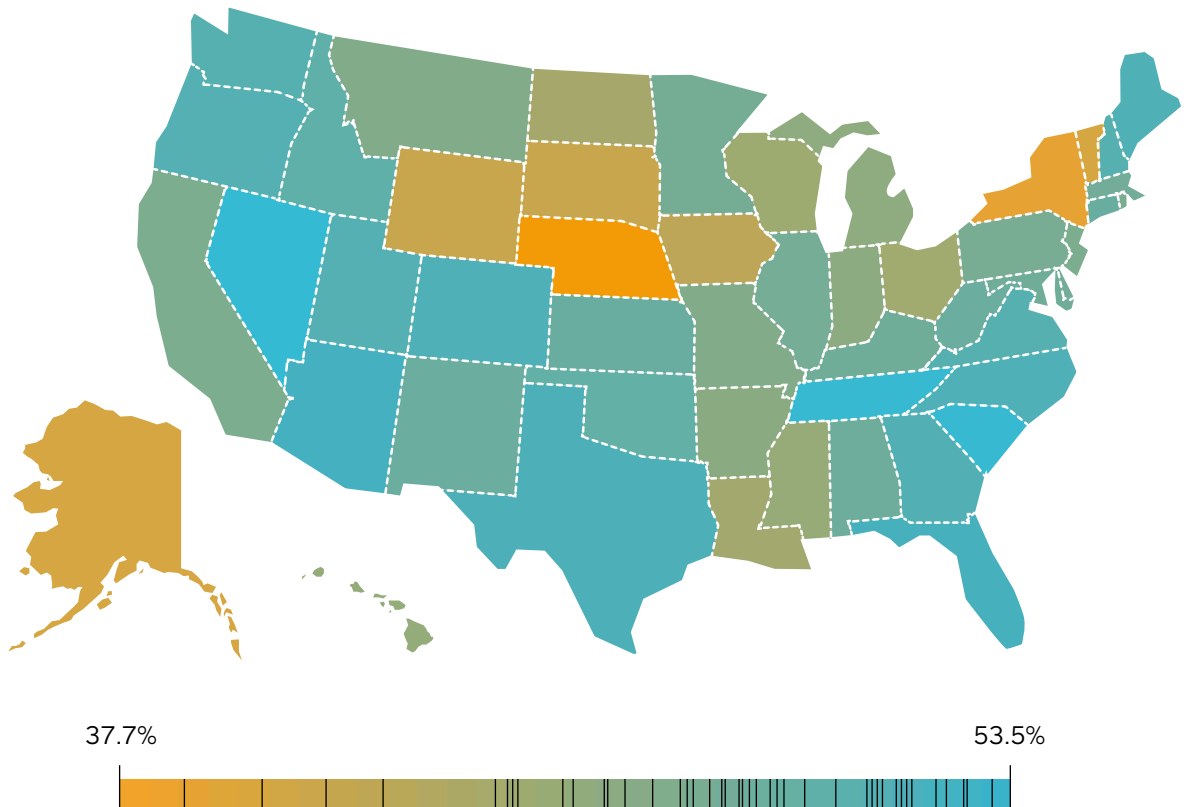
# National Trends

## Q1, BY STATE

### Q1 Share of Inbound v. Outbound Moves by State

In 2021 to date, Americans are moving, but where they are moving may be surprising. **Continuing a 2020 trend, in Q1 2021 movers left expensive, densely-populated states in favor of more expansive, warm, and affordable southern and western states.**

An analysis of ~300K moves that took place in Q1 2021 reveals which states had the highest percentage of inbound moves. This map visualizes how the southern half of the country experienced a higher percentage of inbound moves, while the Midwest, Northeast, and California saw some of the lowest percentages of inbound moves.



Percentage of inbound moves by state, Q1 2021

# National Trends

## Q1, BY STATE

### Key Insights

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- **Only 16 states had a greater percentage of inbound moves than outbound moves;** the remaining 34 experienced more residents departing than entering.
- 8 of the 16 are year-round warm weather states and in the southern half of the country. This includes Nevada, South Carolina, Tennessee, Florida, Texas, North Carolina, Georgia, and Virginia.
- An additional 6 of the 16 are in the western half of the country: Arizona, Colorado, Utah, Oregon, Idaho, and Washington.
- Only two states, Maine and New Hampshire, were in the Northeast. Maine is the least densely populated state in the Northeast region of the U.S.
- 4 of the top 10 inbound states do not charge residents income tax: Nevada, Florida, Tennessee, and Texas.
- **New York, a densely populated state that was also the early epicenter of the pandemic,** saw the 2nd highest percentage of outbound moves of any state in Q1, at 61%, up from Q1 2020 at 58%

# National Trends

## Q1, BY STATE

### Q1 Share of Inbound v. Outbound Moves by State

		Inbound	Outbound
1.	Nevada	53.5%	46.5%
2.	South Carolina	52.8%	47.2%
3.	Tennessee	52.7%	47.3%
4.	Arizona	52.4%	47.6%
5.	Florida	52.2%	47.8%
6.	Texas	51.8%	48.2%
7.	North Carolina	51.8%	48.2%
8.	Colorado	51.6%	48.4%
9.	Georgia	51.5%	48.5%
10.	Maine	51.4%	48.6%
11.	Utah	51.2%	48.8%
12.	Oregon	51.2%	48.8%
13.	Virginia	51.0%	49.0%
14.	Washington	50.9%	49.1%
15.	New Hampshire	50.9%	49.1%
16.	Idaho	50.3%	49.7%
17.	Oklahoma	49.7%	50.3%
18.	West Virginia	49.5%	50.5%
19.	Kansas	49.4%	50.6%
20.	Connecticut	49.4%	50.6%
21.	New Mexico	49.3%	50.7%
22.	Alabama	49.0%	51.0%
23.	Delaware	49.0%	51.0%
24.	Kentucky	48.8%	51.2%
25.	Maryland	48.7%	51.3%
26.	Massachusetts	48.6%	51.4%
27.	Illinois	48.4%	51.6%
28.	Minnesota	48.4%	51.6%
29.	Pennsylvania	48.2%	51.8%
30.	Rhode Island	48.1%	51.9%
31.	California	47.8%	52.2%
32.	New Jersey	47.8%	52.2%
33.	Missouri	47.2%	52.8%
34.	Montana	47.1%	52.9%
35.	Michigan	46.4%	53.6%
36.	Indiana	46.3%	53.7%
37.	Arkansas	46.2%	53.8%
38.	Hawaii	45.8%	54.2%
39.	Mississippi	45.7%	54.3%
40.	Wisconsin	44.9%	55.1%
41.	Ohio	44.7%	55.3%
42.	Louisiana	44.3%	55.7%
43.	North Dakota	44.3%	55.7%
44.	Wyoming	42.8%	57.2%
45.	Iowa	42.7%	57.3%
46.	South Dakota	42.0%	58.0%
47.	Vermont	40.5%	59.5%
48.	Alaska	39.9%	60.1%
49.	New York	39.1%	60.9%
50.	Nebraska	37.7%	62.3%

# National Trends

## Q1, BY METRO AREA

### Metropolitan areas with the greatest percentage of inbound migration

Updater analyzed the percentage of inbound vs. outbound moves by metropolitan area and learned that the above state-level trends carried over to metro areas. The table below ranks the top 20 metro areas by percentage of inbound moves in Q1 2021.

Q1 2021 Rank	Change v. Q4 2020	Q4 2020 Rank	Q1 2020 Rank
1. Fort Myers, FL	▲ +1	2	8
2. Savannah, GA	▲ +4	6	32
3. Austin, TX	▲ +6	9	2
4. Wilmington, NC	▲ +1	5	7
5. Sarasota, FL	▼ -1	4	29
6. Knoxville, TN	▲ +2	8	4
7. Charleston, SC	▲ +4	11	12
8. Odessa, TX	--	*	*
9. Las Vegas NV	▲ +3	12	6
10. Spokane, WA	--	10	13
11. Tampa, FL	▲ +6	17	16
12. West Palm Beach, FL	▼ -5	7	22
13. Lakeland, FL	▲ +16	29	*
14. Nashville, TN	--	14	3
15. Phoenix, AZ	▲ +5	20	5
16. Jacksonville, FL	▲ +12	28	17
17. Melbourne, FL	▼ -14	3	18
18. Raleigh, NC	--	18	10
19. Greenville, SC	▼ -3	16	27
20. Dallas, TX	▲ +2	22	15

\* MSAs with fewer than 1,000 moves in a quarter do not qualify for a ranking.

# National Trends

## Q1, BY METRO AREA

### Key Insights

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- **Seven MSAs in Florida made it to the Top 20 list in Q1 2021**, up from only four metro areas a year ago.
- All but one metro area (**Spokane, WA**) were in year-round warmer climates.
- **Savannah, Georgia** continued its year-long climb up the rankings from #32 to #2 YoY.
- **Sarasota, Florida** continued its year-long climb up the rankings from #29 to #5 YoY.
- Cities that dropped in rankings from Q1 2020 to Q1 2021 will be interesting to watch for a rebound throughout 2021: **Nashville**, **Raleigh**, and **Phoenix** are examples.



# National Trends

## Q1, BY METRO AREA

### Metropolitan areas with the greatest percentage of outbound migration

The table below ranks the top 20 MSAs by percentage of outbound moves in Q1 2021.

Q1 2021 Rank	Change v. Q4 2020	Q4 2020 Rank	Q1 2020 Rank
1. Milwaukee, WI	▲ +1	2	*
2. Cleveland, OH	▲ +3	5	1
3. New York, NY	▼ -2	1	2
4. St. Louis, MO	▲ +3	7	5
5. Colorado Springs, CO	▲ +28	32	25
6. Hartford, CT	▼ -3	3	*
7. Detroit, MI	▲ +1	8	6
8. El Paso, TX	--	*	*
9. Columbus, OH	▲ +5	14	9
10. Honolulu, HI	▼ -4	6	14
11. Los Angeles, CA	▲ +1	12	15
12. Grand Rapids, MI	▲ +13	25	*
13. San Francisco, CA	▼ -3	10	20
14. Indianapolis, IN	▲ +5	20	19
15. Minneapolis, MN	▲ +3	18	12
16. Chicago, IL	▼ -1	15	17
17. Philadelphia, PA	▲ +4	21	10
18. Boston, MA	▼ -7	11	22
19. San Diego, CA	▲ +4	23	18
20. Pittsburgh, PA	▼ -3	17	4

\* MSAs with fewer than 1,000 moves in a quarter do not qualify for a ranking.

# National Trends

## Q1, BY METRO AREA

### Key Insights

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- 50% of cities with the highest percentage of outbound moves are located in the Midwest.
- **New York City** and **San Francisco** both experienced heavy outfluxes in 2020, but lost slightly less residents in Q1 2021, signaling a very mild recovery.
- **El Paso, Grand Rapids,** and **Hartford** made the outbound list for the first quarter in more than one year, signaling more residents leaving than arriving.

# Outlook for 2021

## IN SUMMARY

**As the pandemic wildly changed what “home” meant for many Americans in 2020**, it also shifted migration patterns in unique ways. At the national level, significant movement took place from high-density MSAs and zip codes to lower-density MSAs and zip codes.

Q1 2021 migration demonstrated much of the same trends that carried through 2020. The smaller, less dense, and warm weather MSAs continued to receive new movers, as they have for years. The pandemic didn't change that trend, but accelerated it and the trend will likely continue through a post-pandemic rebound period.

It remains to be seen how this pattern will continue in the months ahead. Leading factors that will influence future patterns include the ability to work from home, city-specific job growth, and vaccine distribution. If our largest cities can relaunch the amenities and value-adds that draw residents in, it's plausible that previous residents will return and new residents will be inspired to move when it's safe and the pandemic eases.

**To learn more and dive deeper into local migration patterns, please visit [updater.com/trends](https://updater.com/trends).**

# About Updater

WE KNOW MOVERS

Updater is the nation's leading relocation technology company, built to make moving easier for the 30M+ Americans that relocate each year. Updater helps users seamlessly connect TV and internet, find and reserve reputable moving companies, update accounts and records, transfer utilities, forward mail, secure insurance, save money through exclusive offers, and more. Updater's proprietary relocation technology platform is an industry standard, enabling a personalized and trusted all-in-one app for the relocation process.

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