

Domestic Migration In 2025: The Great Slowdown

Dive into the data to explore domestic migration patterns over the past four years – and uncover states and metro areas emerging as relocation hotspots in 2025.



Table of Contents

Key Takeaways	3
Americans on the Move	3
Sunny Skies and High Peaks: The Mountain & Sun Belt Advantage	4
Hitting the Brakes in 2024	5
The Big Ten: Stabilization in America's Largest States	6
Where are Californians & New Yorkers Going?	7
Phoenix Bucks the Trend	9
Digging Deeper Into the Phoenix Draw	10
Looking Ahead	11

Key Takeaways

- **Idaho and South Carolina have emerged as significant domestic migration magnets over the past four years.** Between January 2021 and 2025, both states gained over 3.0% of their populations through domestic migration. Other Mountain and Sun Belt states – including Nevada, Montana, and Florida – also drew significant inflow, while California, New York, and Illinois experienced the greatest outmigration.
- **Interstate migration cooled noticeably in 2024.** During the 12-month period ending January 2025, California, New York and Illinois saw their outflows slow dramatically, while domestic migration hotspots like Georgia, Texas, and Florida saw inflows flatten to zero. A similar cooling trend emerged on a CBSA level.
- **Still, some states continued to see notable relocation activity over the past year.** In 2024, Idaho, South Carolina, and North Dakota drew the most relocators relative to their populations. And among the nation's ten largest states, North Carolina led with an inflow of 0.4%.
- **Phoenix remained a rare bright spot among the nation's ten largest metro areas.** The CBSA was the only major analyzed hub to maintain positive net domestic migration through 2024.

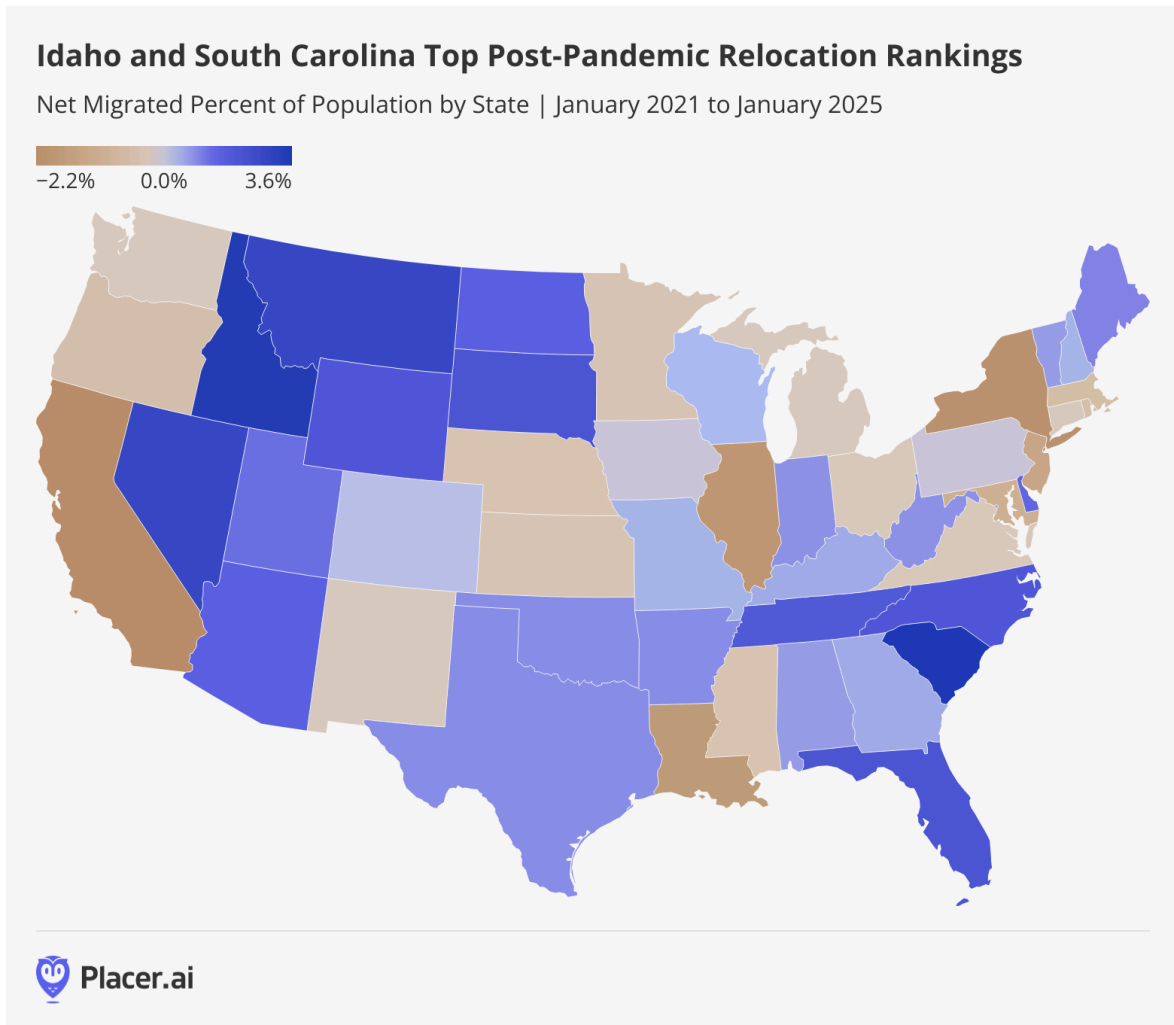
Americans on the Move

Over the past several years, the United States has experienced significant domestic migration shifts, driven by factors like remote work, housing affordability, and regional economic opportunities. As some areas reap the benefits of population inflows, others grapple with outflows tied to higher living costs and evolving workplace dynamics.

This report dives into the location analytics to explore where Americans have moved since 2021 – and how these patterns began to change in 2024.

Sunny Skies and High Peaks: The Mountain & Sun Belt Advantage

Since 2021, Americans have flocked toward warmer climates, expansive natural scenery, and more affordable housing options – particularly in the Mountain and Sun Belt states.



Between January 2021 and January 2025, South Carolina led the nation in positive net domestic migration – drawing an influx of newcomers equivalent to 3.6% of its January 2025 population. (This metric is referred to as a state’s “net migrated percent of population.”) Next in line was Idaho with a 3.4% net migrated percent of

population, followed by Nevada, (2.8%), Montana (2.8%), Florida (2.1%), South Dakota (2.1%), Wyoming (2.0%), North Carolina (2.0%), and Tennessee (1.9%). Texas saw positive net migration of just 0.9% during the same period. However, the Lone Star State's large overall population means a substantial number of newcomers in absolute terms.

Meanwhile, California (-2.2%), New York (-2.1%), and Illinois (-1.9%) experienced the greatest outflows relative to their populations. This exodus was driven largely by soaring housing costs and the rise of remote work, which lowered barriers to moving out of high-priced areas.

Hitting the Brakes in 2024

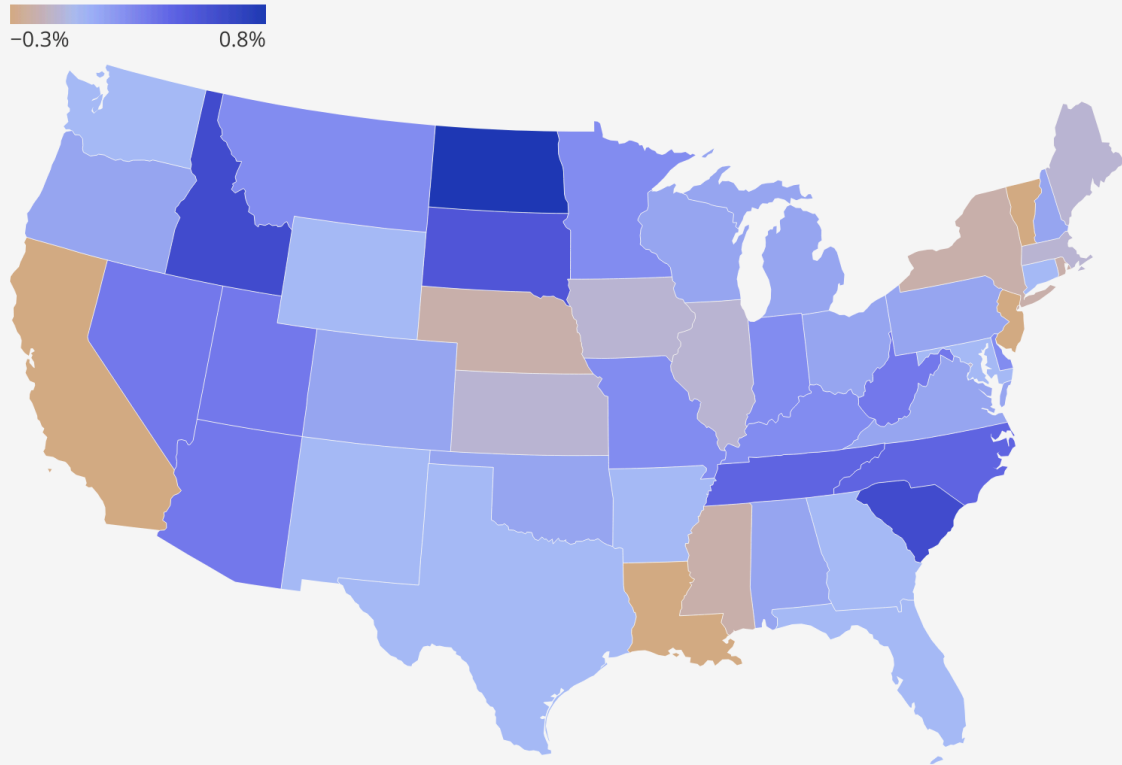
Between January 2024 and January 2025, many of the same broad patterns persisted, but at a more moderate clip – suggesting a stabilization of domestic migration nationwide. This leveling off could reflect factors such as rising [mortgage interest rates](#), which dampened home buying and selling, as well as the increased [push](#) for employees to return to the office.

Still, South Carolina (+0.6%) and Idaho (+0.6%) remained among the top inflow states. The two hotspots were joined – and slightly surpassed – by North Dakota (+0.8%), where even modest waves of newcomers make a big impact due to the state's lower population base. A wealth of affordable housing and a strong job market have [positioned](#) North Dakota as a particularly attractive destination for U.S. relocators in recent years. And Microsoft and Amazon's establishment of major presences around [Fargo](#) has strengthened the region's economy.

Meanwhile, California (-0.3%), New York (-0.2%), and Illinois (-0.1%) continued to post negative net migration, but at a markedly slower rate than in prior years. And notably, several states that had been struggling with outflow, such as Michigan, Minnesota, Virginia, Ohio, and Oregon, began showing minor positive inflow during the same 12-month window. As home affordability erodes in pandemic-era hot spots like the Mountain states and Sun Belt, these areas may emerge as new destinations for Americans seeking lower costs of living.

South Carolina and Idaho Remain at Forefront of Domestic Migration Over Past Year – Joined by North Dakota

Net Migrated Percent of Population by State | January 2024 to January 2025



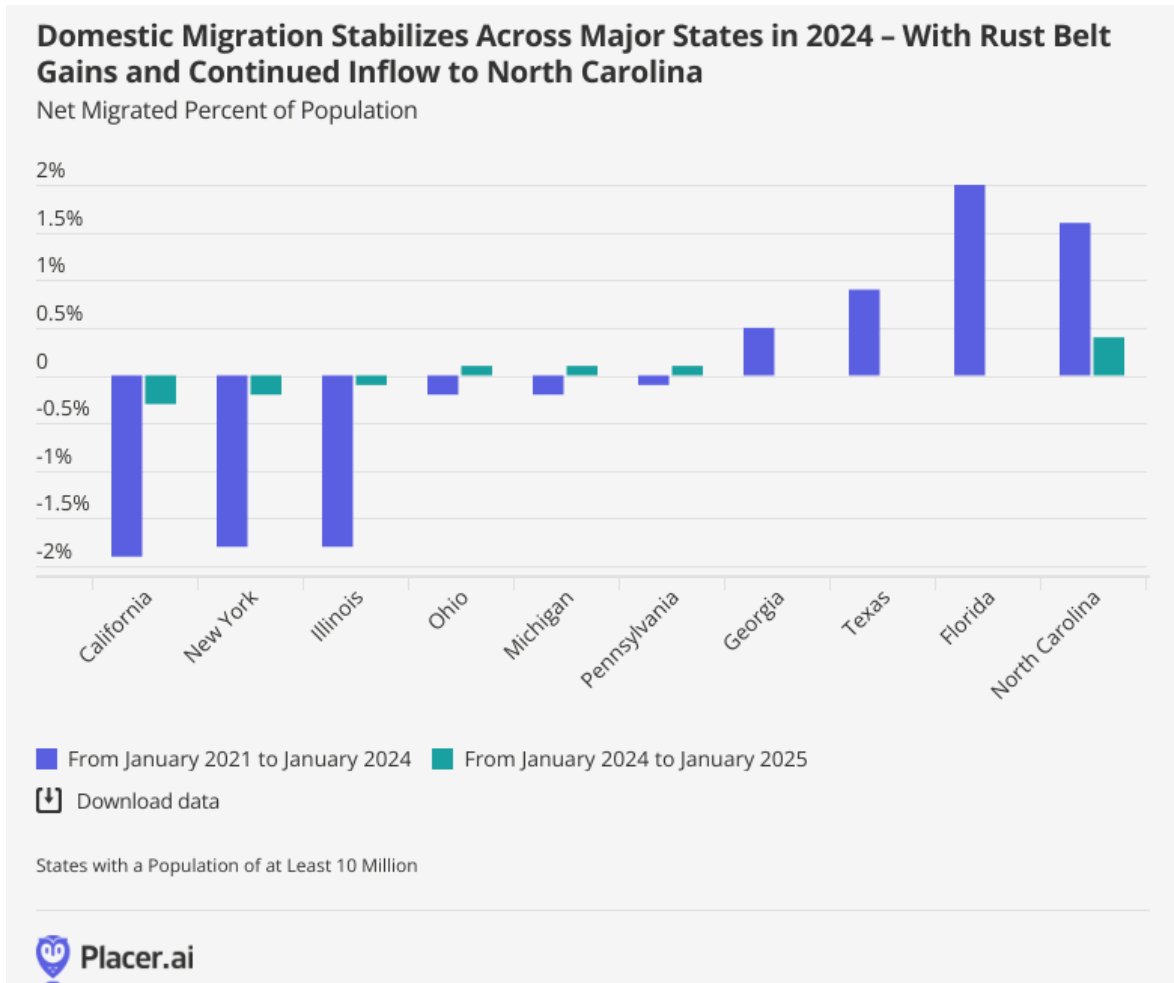
The Big Ten: Stabilization in America's Largest States

Zooming in on the ten most populous U.S. states offers an even clearer picture of how domestic migration patterns have stabilized over the past year. The graph below shows a side-by-side comparison of domestic migration patterns during the 36-month period ending January 2024 and the 12-month period ending January 2025.

California, New York, and Illinois saw population outflows slow dramatically during the 12 months ending January 2025 – while domestic migration magnets such as Georgia, Texas, and Florida saw inflow flatten to zero. Meanwhile, Ohio, Michigan, and

Pennsylvania flipped from slightly negative to slightly positive net migration – incremental upticks that could signal a possible turnaround.

The only “Big Ten” pandemic-era migration magnet to maintain strong inflow in 2024 was North Carolina – which saw a 0.4% influx in 2024 as a result of interstate moves.



Where are Californians & New Yorkers Going?

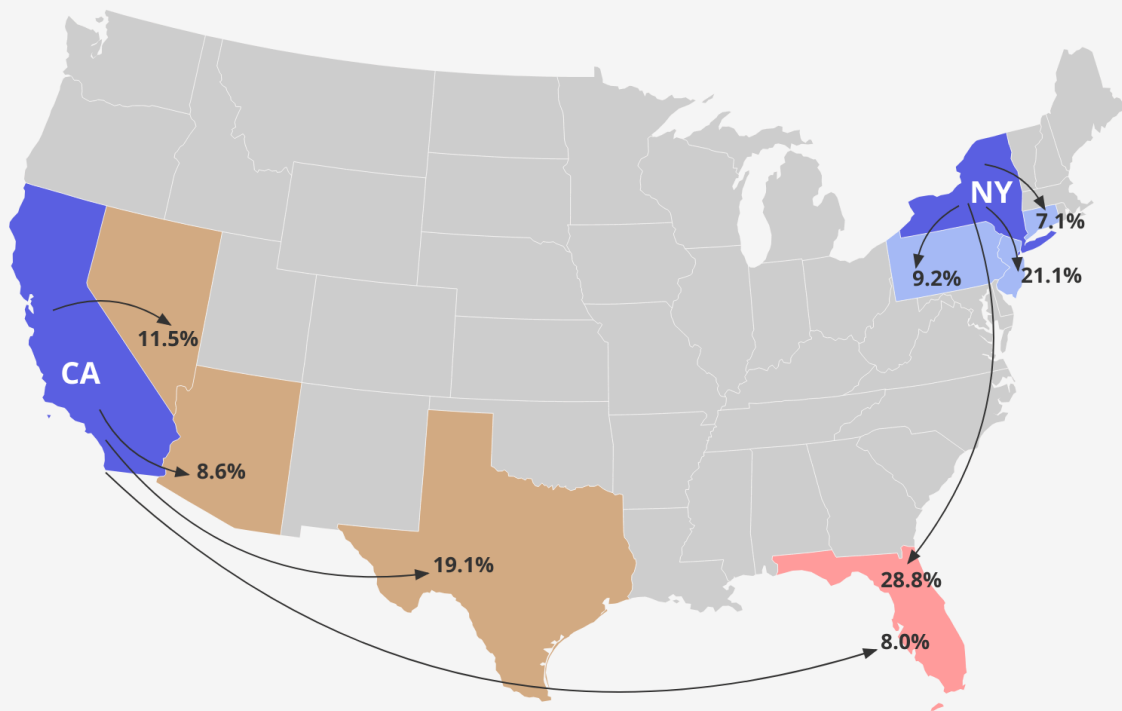
A closer look at the top four states receiving outmigration from California and New York (October 2020 to October 2024) reveals that residents leaving both states tended to settle in nearby areas or in Florida.

Among those leaving New York, 37.4% ended up in neighboring states – 21.1% moved to New Jersey, 9.2% to Pennsylvania, and 7.1% to Connecticut. But an astonishing 28.8% decamped all the way to the Sunshine State, trading the Northeast’s colder climate for Florida sunshine.

Similarly, 20.1% of California leavers chose to stay nearby, moving to Nevada (11.5%) or Arizona (8.6%). Another 19.1% moved to Texas, and 8.0% moved to Florida, making it the fourth-largest destination for Californians.

Neighboring States and Florida Among the Top Moving Destinations for Californians and New Yorkers

Share of Outgoing Migration from California and New York | October 2020 to October 2024



Phoenix Bucks the Trend

Zooming in on CBSA-level data – focusing on the nation’s ten largest metropolitan areas, all with over five million people – reveals a similar picture of slowing domestic migration over the last year.

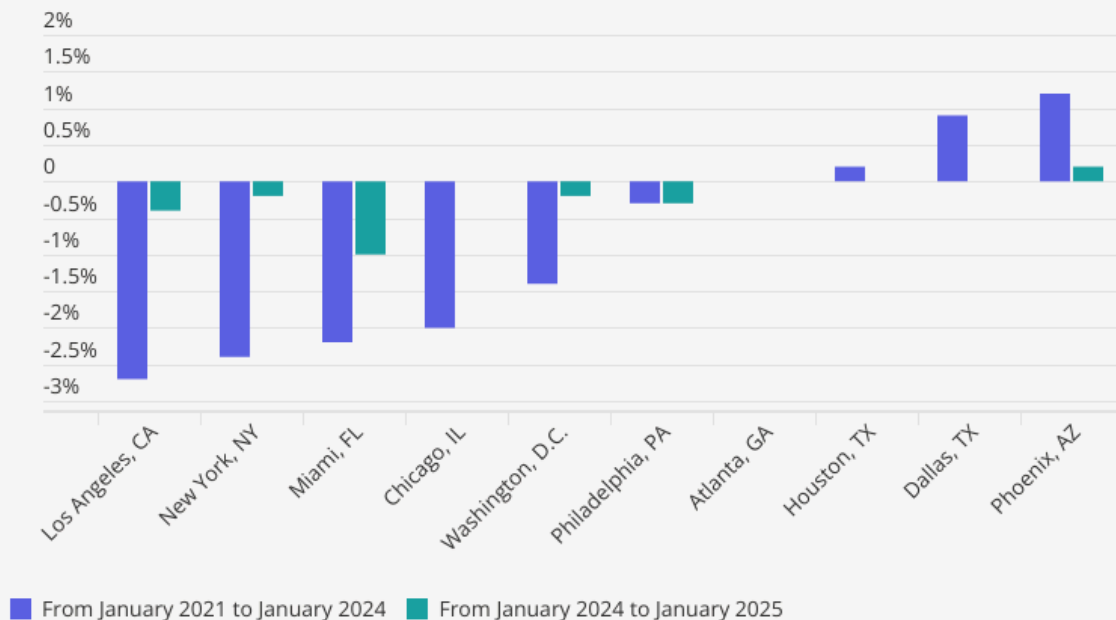
Los Angeles, New York, Chicago, and Washington, D.C. – four cities that experienced notable population outflows between January 2021 and January 2024 – saw those outflows flatten considerably. For these metros, this leveling-off may serve as a promising sign that the waves of departures seen in recent years may have begun to subside. Conversely, Houston and Dallas, which both welcomed positive net migration between January 2021 and January 2024, registered zero-net domestic migration in 2024. Atlanta, for its part, remained flat in both of the analyzed periods.

In Miami, however, outmigration persisted at a substantial rate. Despite Florida’s overall status as a domestic migration magnet, Miami lost 2.6% of its population to domestic net migration between January 2020 and January 2024 – and another 1.0% between January 2024 and January 2025. As one of Florida’s [most expensive](#) housing markets, Miami may be losing some residents to other parts of the state or elsewhere in the region. Meanwhile, Philadelphia, which lost 0.3% of its population to net domestic migration between January 2021 and January 2024, continued losing residents at a slightly faster pace in 2024 – another 0.3% just last year.

Of the ten biggest CBSAs nationwide, only Phoenix continued to see a net domestic migration gain through 2024 (+0.2%). This highlights the CBSA’s continued draw as a (relative) relocation hotspot even in 2024’s cooling market.

As Relocation Slows Across Major Metro Areas, Phoenix Sees Continued Influx of Newcomers

Net Migrated Percent of Population



Download data

Metro Areas With a Population of at Least 5 Million



Digging Deeper Into the Phoenix Draw

Who are the domestic relocators heading to Phoenix?

From October 2020 to October 2024, the top five metro areas sending residents to the Phoenix CBSA each registered median household incomes (HHIs) of \$73K to \$98K – surpassing Phoenix’s own median of \$72K. This suggests that many of those moving in are arriving from wealthier, often more expensive metro areas – for whom even Phoenix’s [high-priced](#) market may offer [more affordable](#) living.

Phoenix CBSA Draws Migration from Higher-Income Metro Areas

Median HHI of Top 5 Metro Areas With the Most Migration to Phoenix CBSA | Oct. '20 to Oct. '24



Looking Ahead

Overall, domestic migration patterns appear to have cooled in 2024, reflecting economic and societal trends that have slowed the rush from pricey coastal hubs to more affordable regions. Yet states like South Carolina, Idaho, and North Dakota – as well as metro areas like Phoenix – continue to attract new arrivals, paving the way for evolving regional demographics in the years to come.