2025 U.S. Moving Trends

Residential & Commercial • With 2024 Comparison and 2026 Outlook

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Introduction

The landscape of American mobility in 2025 is defined by continuity and change. This report examines residential and commercial moving trends within the United States during 2025, compares them to 2024, and provides an outlook for 2026. We focus on state-to-state migration, urban vs. suburban shifts, affordability, labor markets, climate impacts, remote work, corporate relocations, office usage, and industrial/logistics moves.

Residential Moving Trends in 2025

State-to-State Migration

Inbound gains concentrate in the Southeast and Sun Belt (e.g., the Carolinas, Tennessee, Georgia, Texas), while high-cost states like California, New York, New Jersey, Illinois, and Massachusetts continue to see net outflows. Movers prioritize affordability, tax burden, and quality of life. Mid-size metros and smaller cities attract steady inflows.

Urban vs. Suburban Shifts

Net out-migration from the largest coastal metros persists, while suburban and mid-size markets grow. A significant share of movers leaving dense cores choose suburban destinations for space and perceived safety.

Affordability & Cost of Living

Affordability remains the number-one driver. Elevated mortgage rates and record home prices keep overall mobility low, but those who do move seek lower-cost states. Taxes and insurance costs (especially in disaster-prone states) weigh heavily on decisions.

Job Markets & Opportunity

Employment remains a key, though not exclusive, driver. Areas with diversified growth in tech, healthcare, logistics, and manufacturing draw talent. Many relocate preemptively to regions with strong economies and reasonable costs.

Climate Impacts

Wildfire, hurricane, and flood exposure—translated into higher insurance premiums—nudges relocation away from high-risk zones. Inland and Appalachian areas gain relative appeal; climate is often a secondary but amplifying factor.

Remote Work Effect

Hybrid/remote work continues to uncouple home and office locations. While some firms tightened return-to-office policies, many workers retain flexibility, sustaining demand for suburban homes and mid-size metros.

Commercial Moving Trends in 2025

Corporate Headquarters Moves

The 2021–2023 HQ relocation wave has cooled but continues at a steadier pace. Moves increasingly target business-friendly states—especially across the South and Mountain West—balancing talent access, taxes, and operating costs.

Office Space: Downsizing vs. Expansion

Policies diverge. Some large enterprises expand or upgrade offices to support in-person collaboration, while many others shrink footprints and adopt hoteling. Vacancy remains elevated in several downtowns; flight-to-quality favors newer, amenity-rich buildings.

Shifting Regional Hubs

Sun Belt cities (Austin, Dallas–Fort Worth, Nashville, Raleigh, Miami, Phoenix) strengthen as multi-industry hubs. Mountain West and select Midwest metros gain specialized roles (semiconductors, robotics, EV/batteries).

Industrial & Logistics Relocations

Warehousing and manufacturing continue expanding toward centrally located, lower-cost markets to improve resilience and delivery speed. Reshoring and supply-chain diversification drive new facilities, especially in the ‘Battery Belt’ and major distribution corridors.

Key Differences: 2024 vs. 2025

1. Florida’s pandemic-era boom moderated as insurance costs and storm risks rose; the Carolinas and Tennessee gained share.

2. Urban outflow persisted, but the pace of big-city exits modestly slowed compared with 2020–2021 peaks.

3. Overall mobility remained at historic lows (sub-10%), constrained by high housing costs and mortgage-rate lock-in.

4. HQ relocation headlines tapered from 2023 highs, while industrial/logistics investments remained robust.

5. Office strategies diverged more clearly: some firms mandated more in-office time; many permanently optimized (smaller, flexible) footprints.

Outlook for 2026

Residential Outlook (2026)

Expect continued net in-migration to affordable, economically vibrant Sun Belt and Mountain West states; high-cost coastal/Rust Belt states likely see further outflows. Overall mobility remains subdued unless mortgage rates fall materially.

Commercial Outlook (2026)

Steady but selective corporate relocations favoring pro-business states; office market seeks equilibrium with elevated vacancies in older stock and flight-to-quality for modern space. Industrial/logistics expansion and reshoring remain bright spots.

Political & Economic Context

Policy signals around taxation, trade, infrastructure, and insurance can accelerate or temper flows. Elevated insurance costs in high-risk climate zones and any trade/supply-chain realignments will influence both residential and corporate site decisions.

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