

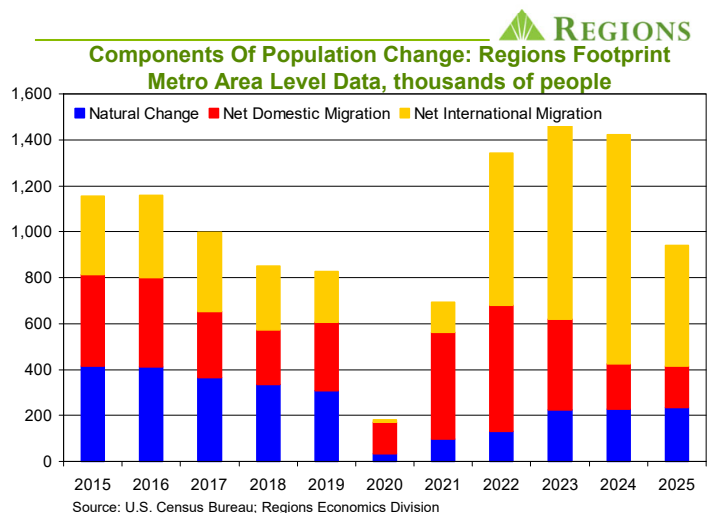


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Components Of 2025 Population Change: Regions Footprint

The U.S. Census Bureau recently released comprehensive 2025 population data on the metro area level, including the components of change in population. Recall that upon the release of the state level data last month we produced our annual summary of the results for the Regions footprint. The state level data showed a dramatic deceleration in total population growth in 2025, both nationally and within the Regions footprint. While a sharp pullback in net international in-migration was a key factor behind the slower pace of population growth, there was also a marked deceleration in the rate at which people moved from other parts of the U.S. into the states that comprise the Regions footprint in 2025, which was a further drag on total population growth within the footprint. The metro area level data are consistent with these patterns seen in the state level data, i.e., significantly slower net in-migration, both domestic and foreign, was a powerful drag on population growth in most in-footprint metro areas in 2025.

As we do each year, we offer a summary of the components of population change for the group of metro areas we track each month in our economic data updates. The summary is presented in tabular form in the pages that follow. Given that we discussed the data in some detail last month in our summary of the state level data, we will not repeat that here. Instead, the table that follows shows, for each of the in-footprint metro areas, the components of the change in total population in 2025 – natural change (the difference between births and deaths), net domestic migration, and net international migration. To highlight the extent to which population growth slowed in 2025, we also show the average changes for each component over the 2022-2024 period for each metro area. Note that the totals for the Regions footprint shown here are only for the group of 103 metro areas we routinely track, meaning that these totals will differ from those shown in the state level summaries.



As we discussed in our summary of the state level data, 2025 saw a marked slowdown in net international in-migration, reflecting the significant changes made in immigration policies/enforcement. The chart to the side shows the impact in our group of in-footprint metro areas. We'll again note that we suspect the 2025 figures on net international in-migration are too high; the Census data are not reported on a calendar year basis but instead on a July/July basis, and our sense is that the second half of 2025 saw a continuation of the outflow of foreign born population seen over the first half of the year. We will, however, have to wait a year – until the 2026 vintage population data are released – to see whether these initial figures for 2025 are revised downward as we suspect they will be.

At the same time, it should be noted that 2025 also saw a sharp deceleration in the rate at which people moved into the footprint from other parts of the U.S. This largely reflected the softening in labor market conditions along with diminished housing affordability,

particularly in many of the larger in-footprint metro areas, both of which inhibited domestic migration. Indeed, for our group of in-footprint metro areas, 2025 saw the lowest level of net domestic in-migration in any year over the 1991-2025 period.

Finally, though perhaps not readily apparent in the above chart, natural population change did increase in 2025, and while that may seem like an encouraging sign, the reality is that it reflects mortality rates finally “normalizing” after having spiked as a result of the pandemic. More importantly, birth rates continue to decline, which will continue to act as a heavy drag on natural population change and, in turn, total population growth. This is not only an issue in the U.S. but is an issue across most of the developed world.

Again, we see no reason to repeat the discussion of the broader trends in the data, and the implications, that we offered back in January. The table that follows presents a breakdown of the components of 2025 population change for each of the 103 in-footprint metro areas we include in our monthly data summaries.

	total population				Net Domestic		Net International	
	% change:		Natural Change (000's)		Migration (000's):		Migration (000's):	
Total Population: Components of Change 2022-2024:		average		average		average		average
	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>
Deltona-Daytona Beach-Ormond Beach, FL	1.29	2.36	-3.714	-4.383	11.894	17.768	1.447	2.567
Gainesville, FL	0.51	1.23	0.065	-0.108	0.185	2.064	1.566	2.330
Jacksonville, FL	1.49	2.32	3.480	2.036	17.360	24.776	5.416	11.649
Ocala, FL	3.43	3.57	-2.508	-2.900	15.971	14.622	1.330	2.016
Palm Bay-Melbourne-Titusville, FL	1.18	2.02	-2.807	-3.414	9.403	13.461	1.227	2.310
Tallahassee, FL	0.35	0.65	0.286	0.122	-0.179	0.609	1.283	1.850
Fort Lauderdale-Pompano Beach-Deerfield Beach, FL	-0.02	1.32	4.422	3.565	-29.517	-16.292	24.944	38.996
Miami-Miami Beach-Kendall, FL	-0.36	1.75	8.749	6.643	-72.254	-52.746	54.204	92.923
Orlando-Kissimmee-Sanford, FL	1.29	2.65	8.871	7.245	-1.785	17.618	30.785	48.104
West Palm Beach-Boca Raton-Delray Beach, FL	0.10	1.53	-0.593	-1.449	-11.953	0.441	14.302	24.724
Cape Coral-Fort Myers, FL	1.62	2.89	-0.477	-1.404	8.603	13.639	5.912	10.448
Lakeland-Winter Haven, FL	2.74	4.05	1.087	0.276	18.752	24.541	3.722	6.216
Naples-Immokalee-Marco Island, FL	0.10	2.47	-0.625	-0.937	-2.337	4.201	3.432	6.356
North Port-Sarasota-Bradenton, FL	1.41	2.72	-4.158	-4.968	14.471	21.751	3.081	6.443
Punta Gorda, FL	2.72	2.73	-2.042	-2.218	7.400	6.606	0.516	0.814
Tampa-St. Petersburg-Clearwater, FL	0.40	1.77	-2.906	-5.104	-1.539	32.932	18.413	29.400
Albany, GA	-0.14	0.17	-0.025	-0.152	-0.359	0.169	0.181	0.225
Athens-Clarke County, GA	0.00	0.88	0.440	0.374	-1.346	0.555	0.922	1.046
Atlanta-Sandy Springs-Roswell, GA	0.96	1.39	25.469	23.442	3.019	17.057	33.399	46.320
Augusta-Richmond County, GA-SC	0.89	1.03	1.169	0.357	3.658	4.687	0.856	1.350
Charleston-North Charleston, SC	1.74	2.36	2.747	2.669	9.911	11.641	2.582	5.101
Columbia, SC	1.02	1.28	0.613	0.491	5.818	7.108	2.443	3.363
Columbus, GA-AL	0.13	-0.22	0.151	0.292	-0.111	-1.887	0.391	0.846
Dalton, GA	0.59	0.99	0.266	0.171	0.262	0.619	0.320	0.662
Gainesville, GA	1.35	2.60	1.072	0.871	1.049	2.778	0.876	1.780
Greenville-Anderson-Mauldin, SC	1.45	2.01	0.362	0.202	11.375	13.659	2.727	5.098
Macon, GA	0.28	0.66	-0.212	-0.381	0.614	1.551	0.269	0.412
Rome, GA	0.18	0.93	-0.107	-0.192	0.166	0.818	0.113	0.286
Savannah, GA	0.99	1.94	1.119	1.046	1.451	4.391	1.734	2.549
Spartanburg, SC	2.75	3.05	0.414	0.188	9.388	9.284	1.214	1.687
Valdosta, GA	0.34	0.85	0.424	0.359	-0.142	0.606	0.236	0.333
Warner Robins, GA	1.80	1.50	0.544	0.409	2.746	2.055	0.405	0.505
Charlotte-Concord-Gastonia, NC-SC	1.88	2.15	11.498	8.884	24.404	27.628	18.239	22.836
Chattanooga, TN-GA	0.79	1.25	-0.354	-0.488	4.010	5.816	0.988	1.756

	total population				Net Domestic		Net International	
	% change:		Natural Change (000's)		Migration (000's):		Migration (000's):	
		average		average		average		average
	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>
Cleveland, TN	1.16	1.30	-0.195	-0.316	1.472	1.443	0.261	0.540
Johnson City, TN	0.72	1.22	-1.002	-1.179	2.315	3.245	0.235	0.371
Kingsport-Bristol-Bristol, TN-VA	0.24	0.57	-2.010	-2.303	2.692	3.842	0.075	0.163
Knoxville, TN	0.90	1.53	-1.651	-2.356	8.855	13.646	1.460	2.585
Morristown, TN	1.16	2.03	-0.357	-0.494	1.668	2.482	0.168	0.443
Raleigh, NC	2.36	2.40	7.477	7.186	19.974	17.786	9.389	10.624
Wilmington, NC	2.58	3.14	-0.820	-1.097	12.719	13.520	0.586	1.132
Fayetteville-Springdale-Rogers, AR-MO	2.43	2.58	3.063	2.772	8.741	8.036	2.955	3.855
Fort Smith, AR-OK	0.50	0.70	0.064	-0.231	0.832	1.375	0.259	0.494
Hot Springs, AR	-0.22	-0.14	-0.652	-0.688	0.380	0.424	0.052	0.146
Jonesboro, AR	0.54	1.06	0.394	0.285	0.182	0.972	0.161	0.197
Little Rock-North Little Rock-Conway, AR	0.65	0.91	0.829	0.711	2.579	3.818	1.580	2.443
Alexandria, LA	-0.06	-0.64	-0.190	-0.205	-0.238	-1.151	0.334	0.403
Longview, TX	0.29	0.93	-0.068	-0.138	0.843	2.315	0.093	0.531
Monroe, LA	-0.32	-0.25	0.041	-0.123	-1.052	-1.117	0.304	0.693
Shreveport-Bossier City, LA	-0.08	-0.45	0.118	0.003	-1.000	-2.760	0.575	1.012
Texarkana, TX-AR	0.06	0.02	-0.324	-0.357	0.329	0.215	0.065	0.194
Tyler, TX	1.21	1.68	0.524	0.450	2.112	2.930	0.379	0.624
Bloomington, IN	0.45	-0.32	-0.264	-0.283	0.125	-1.336	0.872	1.093
Bloomington, IL	-0.05	0.04	0.318	0.264	-1.082	-1.064	0.669	0.887
Champaign-Urbana, IL	0.35	0.28	0.328	0.351	-2.118	-2.780	2.632	3.081
Chicago-Naperville-Elgin, IL-IN-WI	0.24	0.16	18.274	15.781	-33.708	-77.290	37.963	76.276
Decatur, IL	-0.65	-0.86	-0.334	-0.308	-0.462	-0.781	0.143	0.214
Evansville, IN-KY	0.46	0.32	0.007	-0.150	0.996	0.390	0.256	0.712
Indianapolis-Carmel-Anderson, IN	1.02	1.20	8.052	7.093	4.819	2.158	9.519	16.477
Kokomo, IN	-0.14	0.19	-0.251	-0.290	0.116	0.393	0.020	0.076
Lafayette-West Lafayette, IN	0.22	0.43	0.455	0.499	-1.684	-1.875	1.724	2.357
Louisville/Jefferson County, KY-IN	0.53	0.81	1.311	0.217	-2.115	-0.291	8.270	11.354
Peoria, IL	-0.02	-0.22	-0.270	-0.391	-0.506	-1.355	0.717	1.006
Springfield, IL	0.04	-0.38	-0.194	-0.210	-0.120	-1.030	0.379	0.452
Terre Haute, IN	0.28	0.02	-0.354	-0.415	0.641	0.203	0.172	0.297
Austin-Round Rock, TX	2.10	2.85	16.621	16.058	19.860	24.835	17.457	27.396
Dallas-Plano-Irving, TX	1.61	2.61	37.113	35.054	12.596	36.718	42.352	67.015
Fort Worth-Arlington, TX	1.20	1.99	13.706	13.003	5.601	19.639	13.092	19.228

	total population				Net Domestic		Net International	
	% change:		Natural Change (000's)		Migration (000's):		Migration (000's):	
		average		average		average		average
	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>
Houston-The Woodlands-Sugar Land, TX	1.63	2.38	48.002	45.540	7.308	32.600	71.903	98.676
San Antonio-New Braunfels, TX	1.38	2.12	11.014	10.441	18.763	28.392	8.553	17.165
Cedar Rapids, IA	0.68	0.16	0.459	0.300	0.849	-0.744	0.555	0.929
Columbia, MO	0.41	0.81	0.502	0.483	-0.389	0.331	0.769	0.981
Des Moines-West Des Moines, IA	1.03	1.36	3.056	2.890	2.791	3.469	1.891	3.693
Iowa City, IA	0.69	0.71	0.848	0.787	-0.132	-0.521	0.510	1.041
Jefferson City, MO	0.54	0.43	0.178	0.085	0.449	0.384	0.186	0.219
Springfield, MO	0.87	1.00	0.292	0.102	3.466	3.898	0.556	0.867
St. Louis, MO-IL	0.11	-0.03	-2.397	-1.672	-1.382	-7.991	6.718	8.995
Waterloo-Cedar Falls, IA	-0.01	0.23	0.175	0.139	-0.612	-0.355	0.416	0.634
Clarksville, TN-KY	0.69	1.75	2.379	2.414	-0.530	2.480	0.564	0.794
Nashville-Davidson-Murfreesboro-Franklin, TN	1.60	2.06	8.439	7.348	16.967	19.500	9.346	15.565
Jackson, TN	0.46	0.58	-0.148	-0.297	0.835	0.887	0.163	0.482
Memphis, TN-MS-AR	-0.31	0.08	2.201	2.133	-10.302	-8.117	3.959	7.031
Auburn-Opelika, AL	0.95	1.60	0.508	0.496	0.553	1.476	0.870	1.210
Dothan, AL	0.64	0.82	-0.195	-0.297	0.983	1.206	0.201	0.348
Montgomery, AL	0.21	0.27	0.429	0.383	-0.560	-0.679	0.944	1.381
Decatur, AL	0.27	0.76	-0.063	-0.198	0.249	0.939	0.235	0.472
Florence-Muscle Shoals, AL	0.15	0.83	-0.470	-0.519	0.526	1.571	0.177	0.216
Huntsville, AL	2.64	2.46	0.881	0.692	12.351	9.874	1.218	1.920
Anniston-Oxford-Jacksonville, AL	-0.40	0.19	-0.442	-0.456	-0.069	0.603	0.037	0.095
Birmingham-Hoover, AL	0.29	0.36	0.352	-0.256	0.599	1.080	2.490	3.668
Gadsden, AL	0.40	0.18	-0.294	-0.449	0.629	0.489	0.072	0.166
Tuscaloosa, AL	0.08	0.47	0.434	0.284	-0.907	0.350	0.669	0.747
Crestview-Fort Walton Beach-Destin, FL	1.58	1.87	0.541	0.396	3.167	2.885	1.209	2.203
Mobile, AL	-0.13	-0.09	0.127	-0.113	-0.996	-0.796	0.320	0.674
Panama City, FL	2.02	3.50	0.194	-0.135	3.298	5.557	1.090	1.803
Pensacola-Ferry Pass-Brent, FL	0.95	1.41	-0.018	-0.429	4.414	6.035	0.717	1.746
Baton Rouge, LA	0.48	0.44	1.347	1.660	-0.773	-2.829	3.652	5.064
Houma-Thibodaux, LA	0.03	-1.12	0.131	0.077	-0.571	-3.206	0.488	0.734
Lafayette, LA	0.73	0.81	1.154	1.187	0.613	0.437	1.290	1.800
New Orleans-Metairie, LA	-0.26	-0.69	0.627	0.991	-8.906	-17.909	5.776	9.719
Gulfport-Biloxi-Pascagoula, MS	0.90	0.69	-0.385	-0.537	2.720	1.811	1.504	1.666
Hattiesburg, MS	0.53	0.48	0.469	0.332	-0.005	0.095	0.366	0.362

	total population				Net Domestic		Net International	
	% change:		Natural Change (000's)		Migration (000's):		Migration (000's):	
		average		average		average		average
	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>	<u>2025</u>	<u>2022-2024</u>
Jackson, MS	0.22	-0.23	0.709	0.431	-1.526	-4.312	2.144	2.472
U.S.	0.52	0.79	518.858	410.971	N/A	N/A	1,262.202	2,223.572
Total: Regions Metro Areas	0.96	1.50	233.515	193.972	180.620	380.971	526.201	833.206
East Region	1.03	1.89	54.162	30.987	110.083	290.491	251.649	399.156
Mid-America Region	0.97	1.35	173.317	159.446	54.748	85.802	249.083	395.585
South Region	0.56	0.56	6.036	3.539	15.789	4.678	25.469	38.465
Source: U.S. Census Bureau; Regions Economics Division								