

Where did the people go?



An analysis of relocation/moving trends during the COVID-19 pandemic

Introduction

Over the past year, we've seen foot traffic to a variety of non-essential businesses in urban areas being much more impacted by the pandemic than traffic in rural areas.

We've also seen headlines in the news about people fleeing cities in favor of less densely populated areas where they can more easily socially distance themselves—but how much did people really move?

We decided to dig into the data to test the hypothesis that people are leaving cities and moving to less densely populated areas due the pandemic.

The Methodology

Foursquare analyzes foot traffic patterns of millions of Americans that make up our always-on panel. All data is either anonymized, pseudonymized, or aggregated, and is normalized against U.S. Census data to remove age, gender and geographical bias. For this analysis, we took a closer look at relocation patterns of U.S. consumers between Q1—Q4 2020 based on population density, defined as:

- **Rural**, areas with population density of less than 1,000 persons per square mile
- **Suburban**, areas with population density of 1,000-3,000 persons per square mile
- **Urban**, areas with population density of 3,000+ persons per square mile



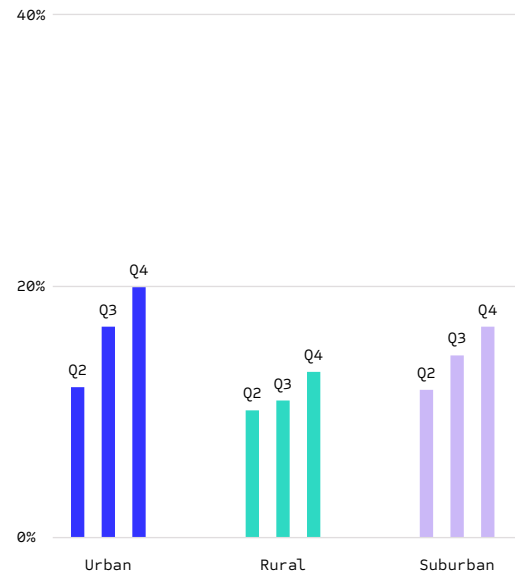
So what did we find?

1. People who lived in urban areas before the pandemic are moving more than people in rural & suburban areas.

Amongst people who lived in urban areas before the pandemic (in Q1 2020), 14.7% moved to a new zip in Q2, 17.7% moved to a new zip code in Q3, and 19.9% moved to a new zip code in Q4.

At the same time, amongst people who lived in rural areas in Q1 2020, only 10.8% moved to a new zip code in Q2 2020, 12.9% in Q3 and 13.8% in Q4.

Suburbanites fell somewhere in the middle, with 13.1% moving to a new zip in Q2, 16.0% in Q3 and 17.0% in Q4 2020.



~20% of city-dwellers moved to a new zip code in Q4 2020

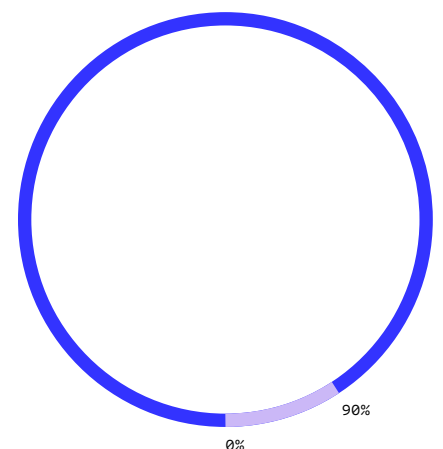
Why are city-dwellers on the move?

Even if they're not leaving the city altogether, people in urban areas may have been more likely to revisit their living situation in light of the pandemic, perhaps looking for a second bedroom or office space as they work from home, a balcony, or a neighborhood with a nearby park.

2. People who lived in rural areas before the pandemic have almost all stayed in rural areas.

As outlined above, 86-89% of people who lived in rural areas before the pandemic (in Q1 2020) stayed in their same zip code throughout the rest of the year.

Amongst rural residents who did make move to a new zip code, only 10-11% moved to suburban or urban areas, while the other 89-90% moved to a different zip code in a rural area.



Nearly 90% of rural residents stayed put during the pandemic

What does this tell us?

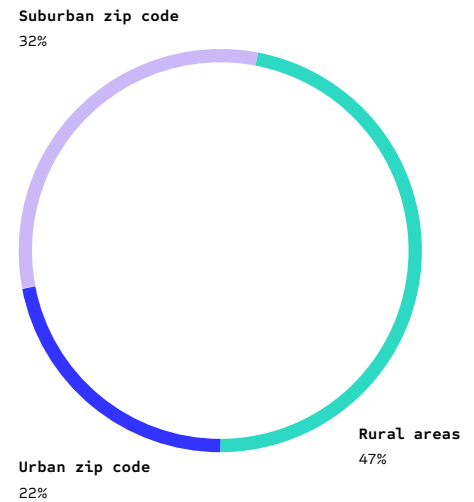
It seems that rural residents likely had less incentive to move during the pandemic, as their current living situations allowed for social distancing, outdoor space, and other perks that made pandemic-life safer and more tolerable.

3. People who moved from suburban areas since the pandemic are making their way to rural areas.

Amongst people who lived in suburban areas and moved since the pandemic, 44-47% moved to rural areas, 31-32% moved to a different suburban zip code, and only 22-24% moved to an urban zip code.

What's the draw?

While it's difficult to discern why a suburbanite may have chosen to move to a more rural area vs. another suburban zip code, it's possible that fewer people chose to move to cities due to dense populations, stricter restrictions on dining and other businesses, and the closure of many offices. As more restrictions are lifted in the coming months, this trend could shift.



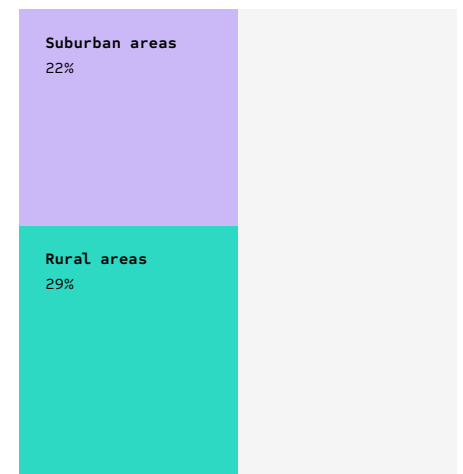
44-47% of the suburban people who moved went to more rural areas

4. People who moved from urban areas since the pandemic began aren't necessarily fleeing cities altogether

Amongst people who lived in urban areas before the pandemic and have moved, there was a roughly 50/50 split between moving to another urban zip vs moving to less densely populated areas. We found that 49-52% moved to another urban zip code, 22-23% moved to a suburban area, and 29% moved to a rural area.

So, did the mass exodus from cities happen?

Based on Foursquare's analysis, it seems that most city-dwellers did not move from urban areas between the onset of the pandemic and the end of 2020. However, more people may have left for shorter periods of time, perhaps staying with family or at second homes during the most intense period of stay-at-home orders.



~50% of city-movers did not leave urban zip codes

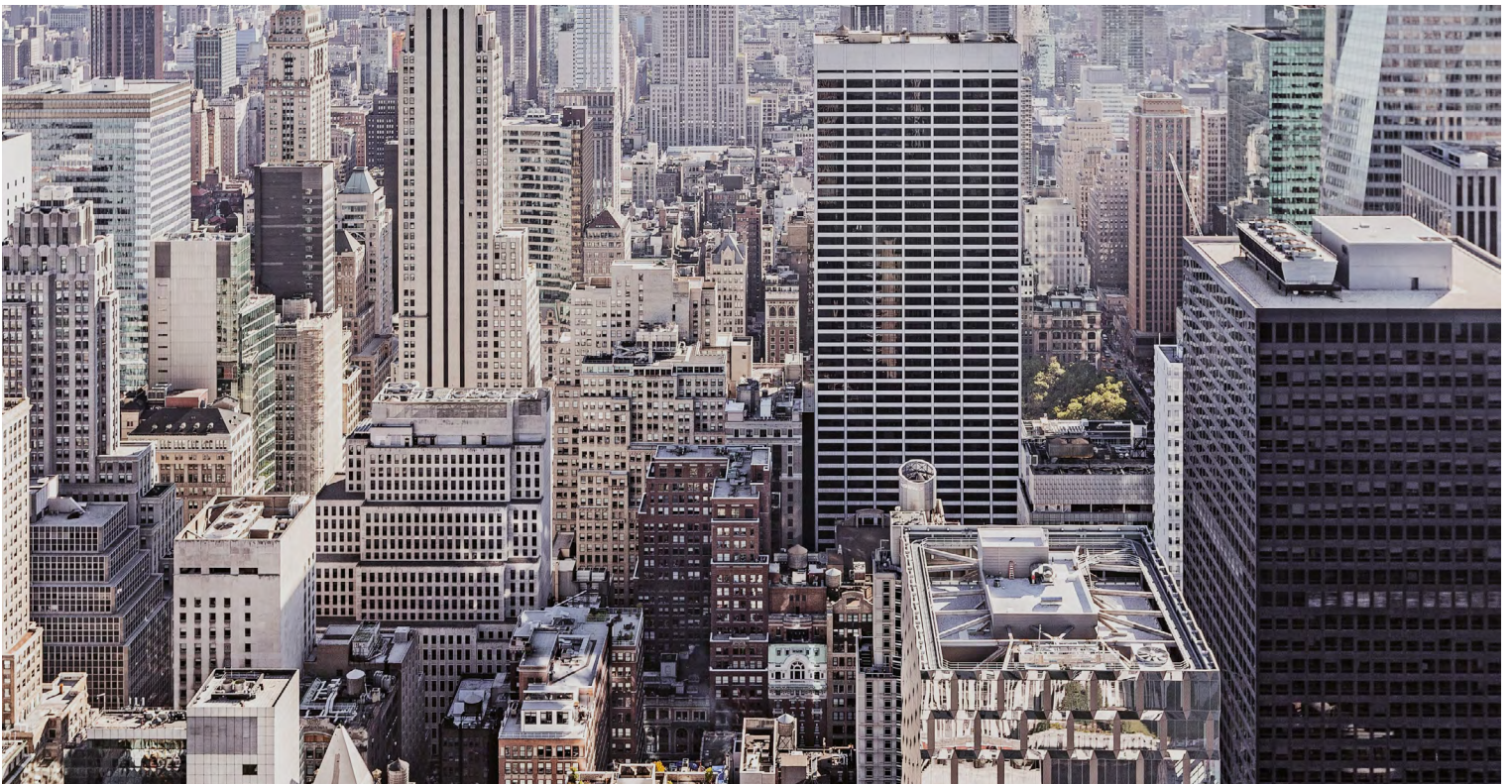
Summary of key findings:

- **City dwellers may not be leaving in droves:** While urbanites seem to be re-evaluating their living situations more so than consumers in rural areas, our data does not necessarily show evidence of a mass migration from the cities to the suburbs.
- **Suburbanites seek space:** People in suburban areas who are deciding to move tend to be migrating to even less densely populated rural areas.
- **Rural residents remain loyal:** Few people living in rural areas are choosing to move at all during the pandemic.

Spotlight on New York City

There has been no shortage of headlines reporting that New Yorkers may have left the city in large number as the pandemic worsened. But Foursquare's data tells a slightly different story.

Our data shows that by the end Q4 of 2020, only 5.3% of New York's urban dwellers had relocated to rural/suburban zip codes outside of the New York City zone. Indeed, 88.5% of New York's pre-pandemic urban dwellers remained in urban NYC zip codes, though not necessarily within the same zip code as Q1 (pre-pandemic).



What do these findings mean for businesses?

The implications of these moving trends will be significant, particularly in areas that experienced large influxes or decreases of population. For businesses, now is the time to ask the following questions:

- **Who** are the people choosing to stay, leave, or move within urban areas?
- **What** types of shops and services are opening up (or should open up) to serve the needs of people moving to urban, suburban, and rural settings?
- **When** will these moving trends shift, or will they continue through 2021?
- **Where** are the areas that are drawing in the most movers—both within cities and in rural/suburban areas?
- **Why** are some people choosing to move while so many others elect to stay put?

Location data and technology can help tackle these and many other challenges brands and enterprises are facing as the world aims to rebound from the profound impact of the COVID-19 pandemic.

Here's are just a few ways that location data and tech can be put to work:

- Site selection
- Territory mapping
- Consumer behavior analysis
- Demand forecasting
- Data enrichment
- Customer segmentation
- Customer experience & loyalty
- Trigger-based notifications and advertisements
- Measurement
- Targeted advertising

Contact us at [Foursquare.com](https://foursquare.com) to learn more about how location data and technology can help your business navigate 2021 and beyond.

Foursquare is the leading independent location technology company, powered by our deep understanding of how people move throughout the world. Our solutions help businesses make smarter decisions, developers create more engaging experiences, and brands build more effective marketing strategies.