

# 2023 MSA and County Population Estimates

Released May 2024

# Introduction

Understanding population growth is important to understanding a regional economy. With two-thirds of a region's economy driven by the residents of the community, an increasing population typically results in a growing economy, additional employment and more development. The COVID-19 pandemic caused widespread disruptions to traditional growth patterns nationwide as the rise in remote work resulted in many people migrating away from urban areas. With immigration plunging and natural population growth decreasing because of falling births and rising deaths, population growth nationwide fell to record lows.

This report looks at the latest population updates for 2023 at the metropolitan area and county levels. With the pandemic impacts becoming more distant, many of the demographic disruptions that it created are settling down although several of southwestern Pennsylvania's peer benchmark regions are beginning to face some of the same challenges of a shrinking population.

While the Pittsburgh region's demographics remain a challenge, particularly with the natural population loss, there are some positive signs. For example, domestic outmigration fell dramatically and is half the rate of the region's peer benchmarks, meaning that people are choosing to remain in the region. Furthermore, a handful of regional counties that had experienced more people moving out than moving in had seen a reversal in that trend since 2020 as remote work provides employees with more options for where to live.

# Key Findings

- As part of its phased release of 2023 Population Estimates data, the U.S. Census Bureau released its estimates for the nation's counties and metropolitan areas in late March, 2024.
  - The Census Bureau annually utilizes current data on births, deaths, and migration to calculate population change since the most recent decennial census and produce a time series of estimates of population, demographic components of change, and housing units.
  - The estimates cover the period from July 1, 2022 to July 1, 2023, and also include revisions reflecting the 2020 to 2022 estimates period.
  - Future releases will cover Housing Unit and Municipal Estimates (all in May) and estimates by age, sex, race, and Hispanic origin (all in June). Additional analyses will follow each release.
  - The metropolitan area estimates do not reflect the revised MSA definitions released in summer 2023.
- **Traditional migration patterns from the Northeast and Midwest to Southeast and Mountain West continued in 2023**, although the urban to rural migration evident in 2022 was much more muted. The number of counties that increased population grew by 13.8%, while the average change in population grew from 0.2% to 0.3%.
- **Southwestern Pennsylvania saw its population fall by 1.4% between April 1, 2020 and July 1, 2023, trailing all of the other benchmark regions.** However, peer regions (except for Cincinnati), also experienced similar population losses.
- **The annualized growth rate in the United States in the 2020s so far is tracking at less than half the rate that it did in the 2010s (0.3% vs. 0.7%) which has led to slower overall growth across nearly all benchmark regions.** Charlotte is the only benchmark region whose growth in the 2020s is tracking closely with the previous decade. The benchmark regions with the largest drops in growth rate tended to have the highest housing costs.
- **Since 2020, natural change has been the primary driver of population loss in southwestern Pennsylvania, while population loss in the peer benchmark regions was driven by a negative net domestic outmigration rate nearly twice that of Pittsburgh.** Aspirational benchmarks were able to offset negative domestic migration with a comparatively healthy natural population increase and international migration. Competitive benchmarks, which had the highest growth rate, saw increases in all categories, in relatively equal proportion.

# Key Findings (continued)

- **In 2023, the Pittsburgh region saw international migration remain steady with 2022 levels.** While higher than the 2018 to 2021 period, it remains below the levels recorded in the middle of the last decade. Fortunately, both the negative natural population change and domestic outmigration dropped, driving the reduction in population loss.
- **Southwestern Pennsylvania has long lagged behind the nation in International Migration and over the past decade the region has fallen further behind the nation.** In 2023, the region's International Migration rate of 1.27 per thousand was a little more than one third the nation (3.40).
- **Before spiking in 2021 due to the pandemic, annual deaths in the region had been steady in the 30,000 to 32,000 range since the early-1990s and returned to that level in 2023.** However, **births have been dropping constantly over that period** and in 2023 totaled just 22,535, 30% fewer than in 1995, the last year birth exceeded the deaths in the region.
- Similar to past years, **nearly all the counties in the region saw decreases in population in 2023 with the exception of Butler and Washington**, which each recorded small increases. Indiana County, which had traditionally been losing population, also saw what amounts to an unchanged population.
- While all counties experienced natural population loss, **negative net migration was a larger factor driving the population loss in Allegheny County, which tends to have a younger population than the other counties in the region.** Butler and Washington, which had traditionally been the only counties to experience positive net migration have been joined by Beaver, Indiana and Westmoreland as having more people move in than move out.

# Outlook

**With the pandemic impacts becoming more distant, many of the demographic disruptions that it created are settling down.** This has resulted in some positive indicators for Southwestern Pennsylvania, in particular domestic outmigration fell by more than 50% to among the lowest levels recorded in the past decade. It is also well below the domestic outmigration rates recorded by the peer and aspirational benchmark regions. International migration has also rebounded, although it remains at half the rate recorded by the region's peer benchmarks and is approximately one-third the national rate.

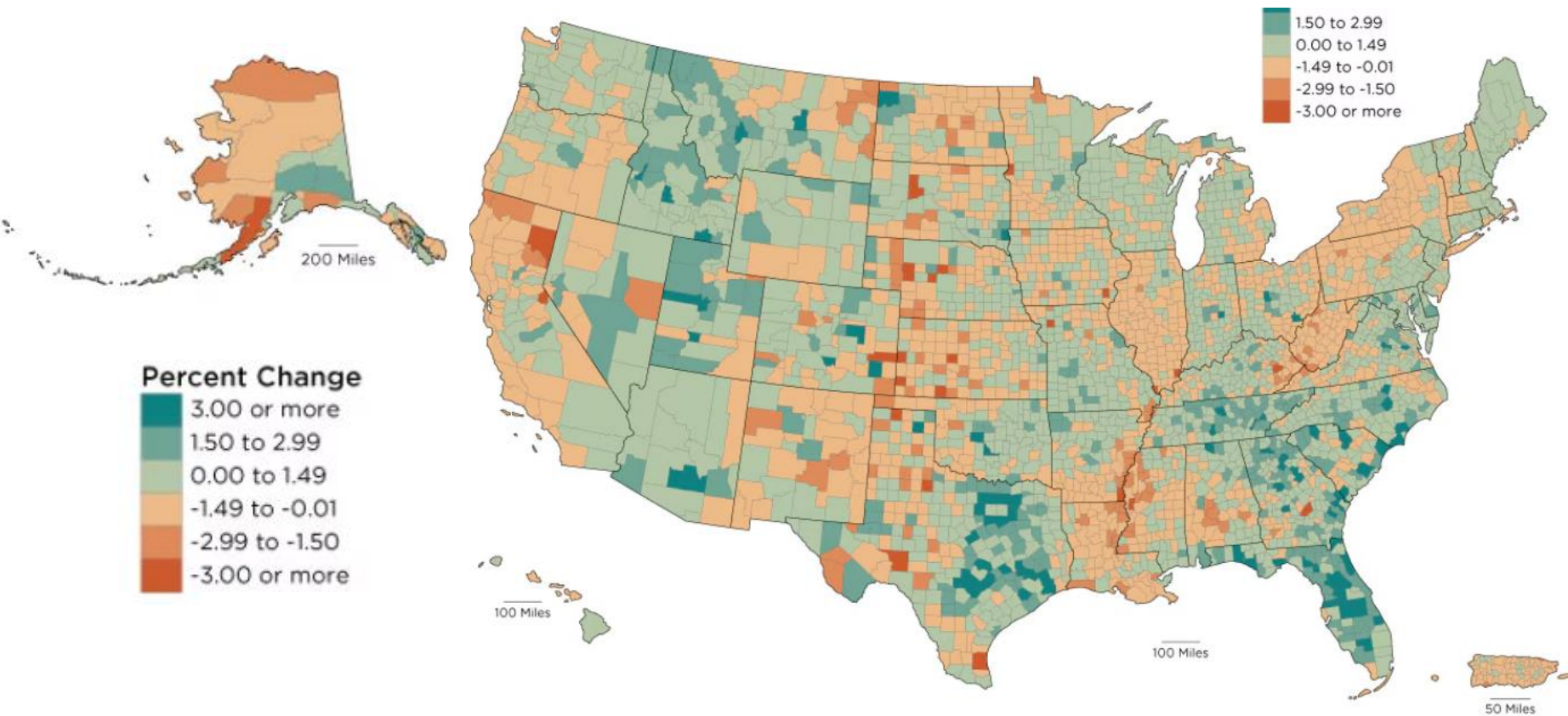
Still, **the region continues to lose population and although the drop fell by more than half over the 2022 to 2023 period as both domestic outmigration and natural population loss were smaller than previous levels, the rate of loss in the first three years of the decade has been larger than in past decades.** This continues to be driven by the region's three decades of negative natural change. While aided by a return of deaths to its historically consistent levels, births continue to decline, reaching its lowest numbers on record. At this point, the continuing drop in births is embedded into the regional demographics and reversing it will be one of the region's biggest challenges, particularly in light of falling birth rates nationwide.

Although all counties experienced natural population loss, **negative net migration was a larger factor driving the population loss in Allegheny and Greene Counties.** Allegheny County, which has a younger population than the other counties in the region, has had the lowest annual rate of natural loss in the region since 2020. Meanwhile **counties such as Beaver, Indiana and Westmoreland are now experiencing positive net migration, reversing past trends.**

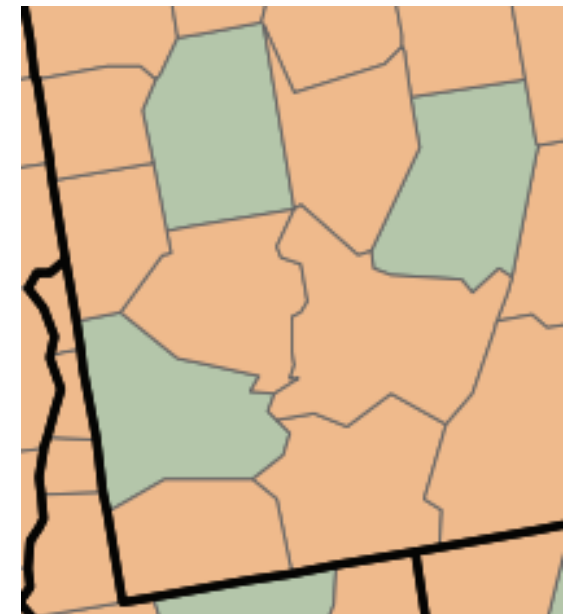
With population growth slowing nationwide, **reversing the region's population loss will remain a challenge.** The most effective solutions for reducing the rate of decrease will be increasing international migration and ensuring an economy that will provide the opportunities for existing residents to stay and draw new residents much like 2010s when the opportunities presented by shale gas resulted in a stable regional population through the decade.

As seen in the following map, traditional migration patterns from the Northeast and Midwest to Southeast and Mountain West continued in 2023. However, approximately 60% (1,876) of U.S. counties gained population from 2022 to 2023, an increase from the 52% of counties (1,649) that experienced population growth the previous year. Among the nation's 3,144 counties, the average change from 2022 to 2023 was 0.3%, up from 0.2%. While the urban to rural migration evident last year was much more muted, rural counties in several states including Wisconsin, Michigan, Missouri, Arkansas, Georgia, Colorado and those in New England showed increases whereas rural counties in central states such as Iowa, Kansas, Oklahoma and the Dakotas showed decreases.

### Percent Change in County Population: July 1, 2022 to July 1, 2023



### Southwestern Pennsylvania

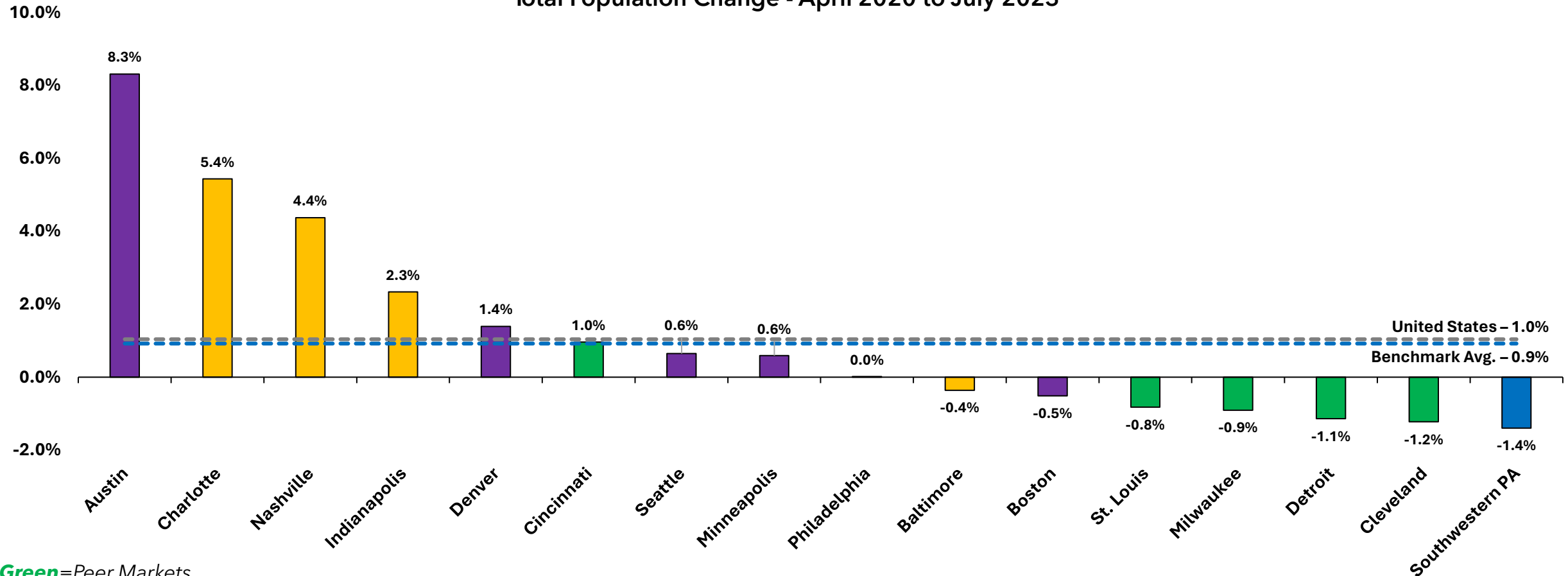


Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

# Metropolitan Areas

Southwestern Pennsylvania saw its population fall by -1.4% between April 1, 2020 and July 1, 2023, trailing all of the other benchmark regions. However, peer regions (except for Cincinnati), also experienced similar population losses. Several of the fastest growing benchmark regions continued their rapid growth from the pre-pandemic era.

### Total Population Change - April 2020 to July 2023



**Green**=Peer Markets

**Purple**=Aspirational Markets

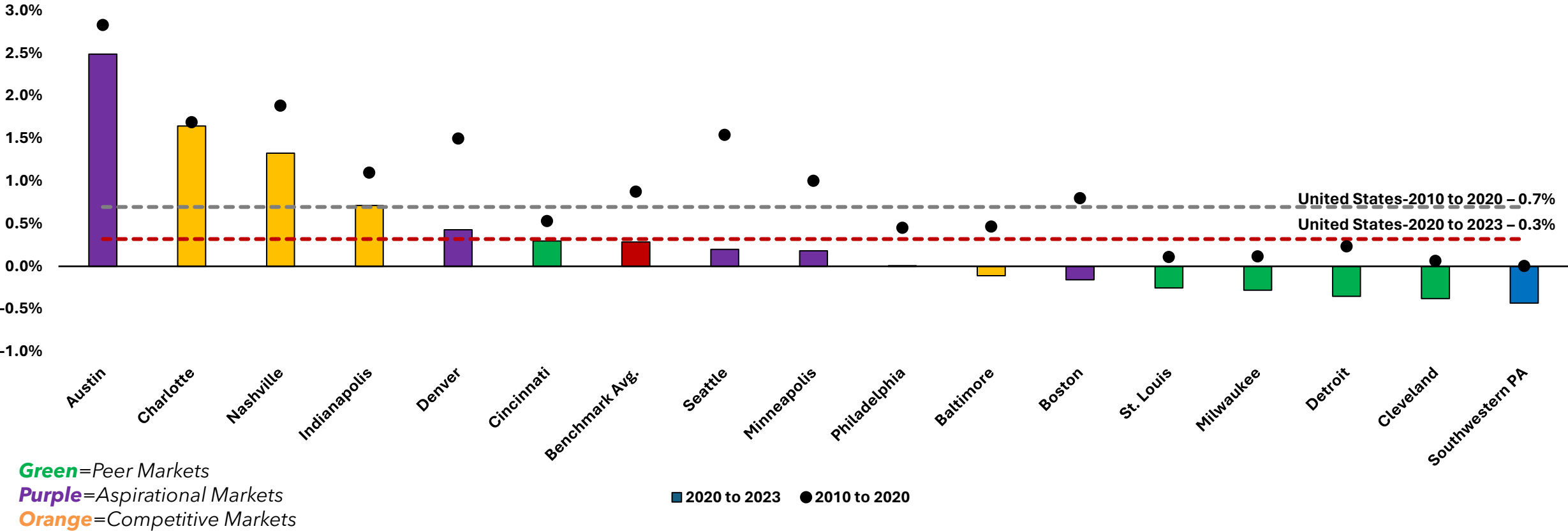
**Orange**=Competitive Markets

Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024



While the COVID-19 pandemic caused widespread disruption in traditional migration patterns, it appears that historic growth patterns have returned, albeit at a slower pace. The annualized growth rate in the United States in the 2020s so far is tracking at less than half rate as it did in the 2010s (0.3% vs. 0.7%). This has led to slower overall growth across nearly all benchmark regions with Charlotte being the only one whose growth in the 2020s is tracking closely with the previous decade. With the exception of Austin, aspirational regions tended to have the largest drops in growth rate. Southwestern Pennsylvania along with four of the five peer regions went from minimal growth in the 2010s to negative territory in the 2020s. They were five of seven regions losing population in the 2020's, joining Baltimore and Boston.

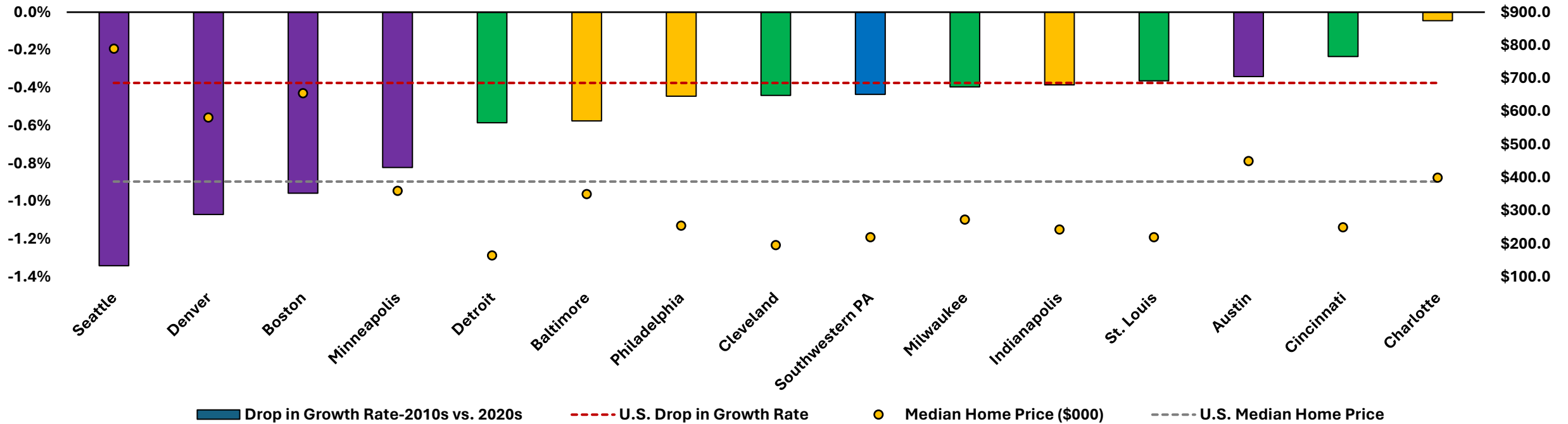
### Compound Annual Growth Rate Comparison - 2020 to 2023 vs. 2010 to 2019



Source: U.S. Census Bureau -Population Estimates, compiled April 2024

It is notable that the regions with the largest decreases in population growth between the 2010s and 2020s tended to have the highest housing costs. Aspirational markets Seattle, Denver and Boston have the highest median home price among the region's benchmark markets and registered the largest decreases in their population growth rate. Regions with home prices below the national median tended to have drops in growth closer to the nation. The notable exceptions were Austin and Charlotte, the two fastest growing benchmark regions, who managed drops in growth rates below the national average despite having median home prices slightly above the nation.

### Growth Rate Change/Housing Cost Comparison



**Green**=Peer Markets  
**Purple**=Aspirational Markets  
**Orange**=Competitive Markets

Note: Nashville home prices are not available.

Source: U.S. Census Bureau -Population Estimates, compiled April 2024

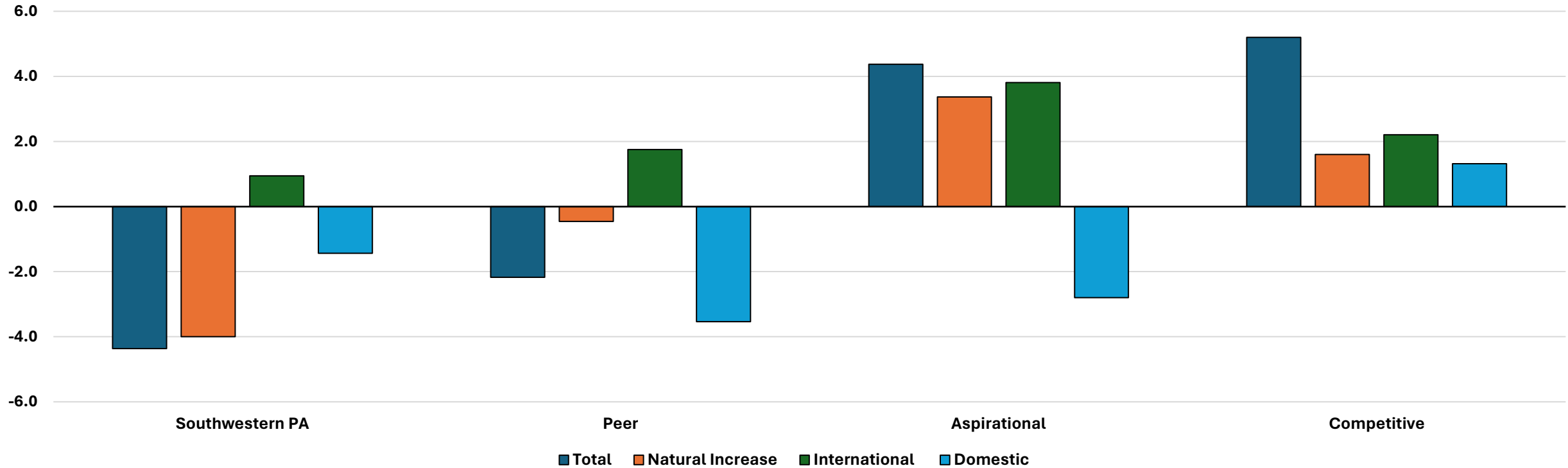
Since 2020, natural change has been the primary driver of population loss in Southwestern Pennsylvania with the annual rate of change (-4.0/1,000) being nearly three times greater than the domestic migration rate (-1.4/1,000)

Pittsburgh’s peer benchmarks lost population at half the rate of Southwestern Pennsylvania, with only a small natural loss but a domestic outmigration rate nearly twice that of Pittsburgh.

Aspirational benchmarks also saw domestic migration slip into negative territory but still managed to increase population due to a comparatively healthy natural population increase and international migration.

Competitive benchmarks, which had the highest growth rate, saw increases in all categories, in relatively equal proportion.

**Average Annual Rate of Change per 1,000 Residents - 2020 to 2023**



Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

Like Pittsburgh, three benchmark regions - Cleveland, Detroit and St. Louis - experienced a natural population loss since 2020 coupled with negative net migration. The population loss in Baltimore, Boston and Milwaukee was driven by outmigration as those metros recorded more births than deaths. Cincinnati, Denver, Minneapolis, Philadelphia and Seattle were able to offset negative domestic migration with international migration and a natural population increase.

	2023 Population	2022 to 2023				2020 to 2023 <sup>1</sup>			
		Total % Change	Natural Change	International Migration	Domestic Migration	Total % Change	Natural Change	International Migration	Domestic Migration
SW Pennsylvania <sup>2</sup>	2,540,176	-0.4%	-10,158	2,402	-3,654	-1.4%	-33,015	7,807	-11,875
<i>Peer</i>									
Cincinnati	2,271,479	0.6%	4,215	6,596	2,028	1.0%	7,630	14,300	-658
Cleveland	2,158,932	-0.1%	-2,381	4,804	-4,166	-1.2%	-15,097	10,559	-22,522
Detroit	4,342,304	-0.1%	1,503	13,785	-21,764	-1.1%	-7,646	29,471	-73,856
Milwaukee	1,560,424	0.1%	2,050	5,188	-5,873	-0.9%	4,706	9,667	-28,191
St. Louis	2,796,999	-0.1%	-1,517	3,856	-5,603	-0.8%	-9,057	10,743	-25,893
<i>Aspirational</i>									
Austin	2,473,275	2.1%	16,807	11,073	22,339	8.3%	47,227	24,775	118,411
Boston	4,919,179	0.3%	9,702	39,952	-33,604	-0.5%	24,007	88,322	-137,422
Denver	3,005,131	0.6%	12,089	7,927	-1,014	1.4%	35,092	17,835	-11,811
Minneapolis	3,712,020	0.6%	14,810	10,620	-4,917	0.6%	43,187	25,337	-48,197
Seattle	4,044,837	0.3%	13,847	24,010	-25,109	0.6%	46,041	64,683	-83,320
<i>Competitive</i>									
Baltimore	2,834,316	0.0%	5,208	9,294	-15,008	-0.4%	9,984	18,637	-40,102
Charlotte	2,805,115	1.8%	9,802	11,267	29,403	5.4%	25,698	26,048	92,334
Indianapolis	2,138,468	0.8%	7,052	8,556	2,305	2.3%	16,780	18,834	13,528
Nashville	2,102,573	1.5%	7,474	6,922	17,324	4.4%	18,259	12,899	57,398
Philadelphia	6,246,160	0.1%	10,264	16,472	-23,102	0.0%	13,201	39,139	-54,208

<sup>1</sup> 10 county region; 8-county MSA population is 2,422,725

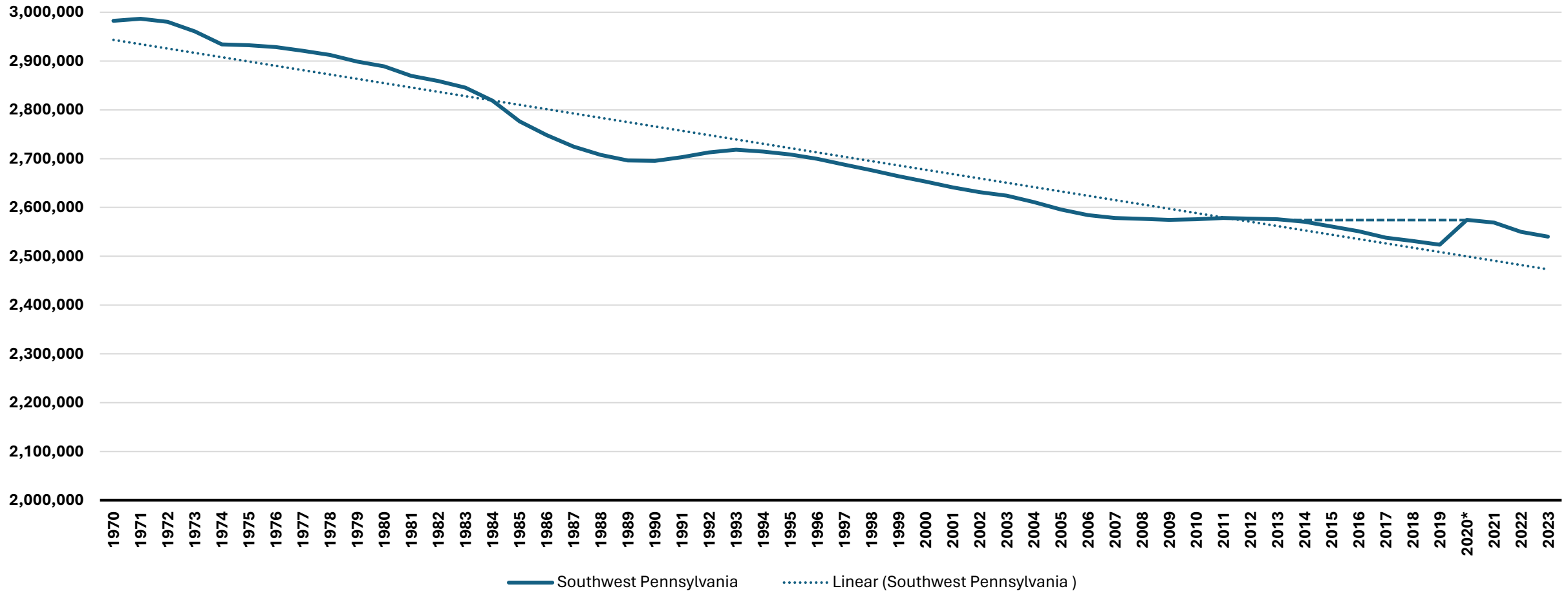
<sup>2</sup> April 1, 2020 to July 1, 2023

Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

# Southwestern Pennsylvania

The 10-county southwestern Pennsylvania region saw its population fall by an estimated 9,949 individuals -between July 1, 2022 and July 1, 2023, to 2,540,176. The drop between 2022 and 2023 was roughly half the revised estimate between 2021 and 2022 (-18,965).

### Southwestern Pennsylvania - 1970 to 2023

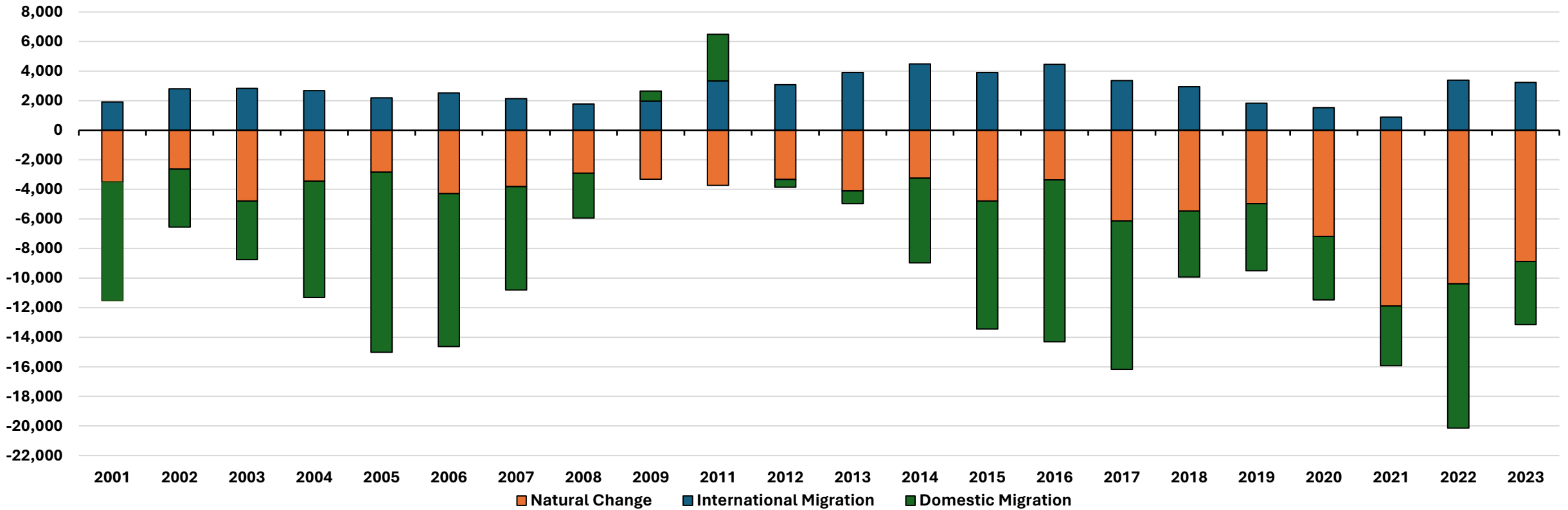


\* In 2020, the population was adjusted upward to reflect the results of the 2020 Decennial Census.

Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

In 2023, the Pittsburgh region saw international migration remain steady with 2022 levels. While higher than the 2018 to 2021 period, it remains below the levels recorded in the middle of the last decade. Fortunately, decreases from both the natural population change and domestic migration dropped, driving the reduction in population loss. Domestic outmigration in particular saw a significant decrease, falling more than half from -9,767 to -4,257, comparable to the levels recorded between 2018 and 2021 and well below 2014 to 2017.

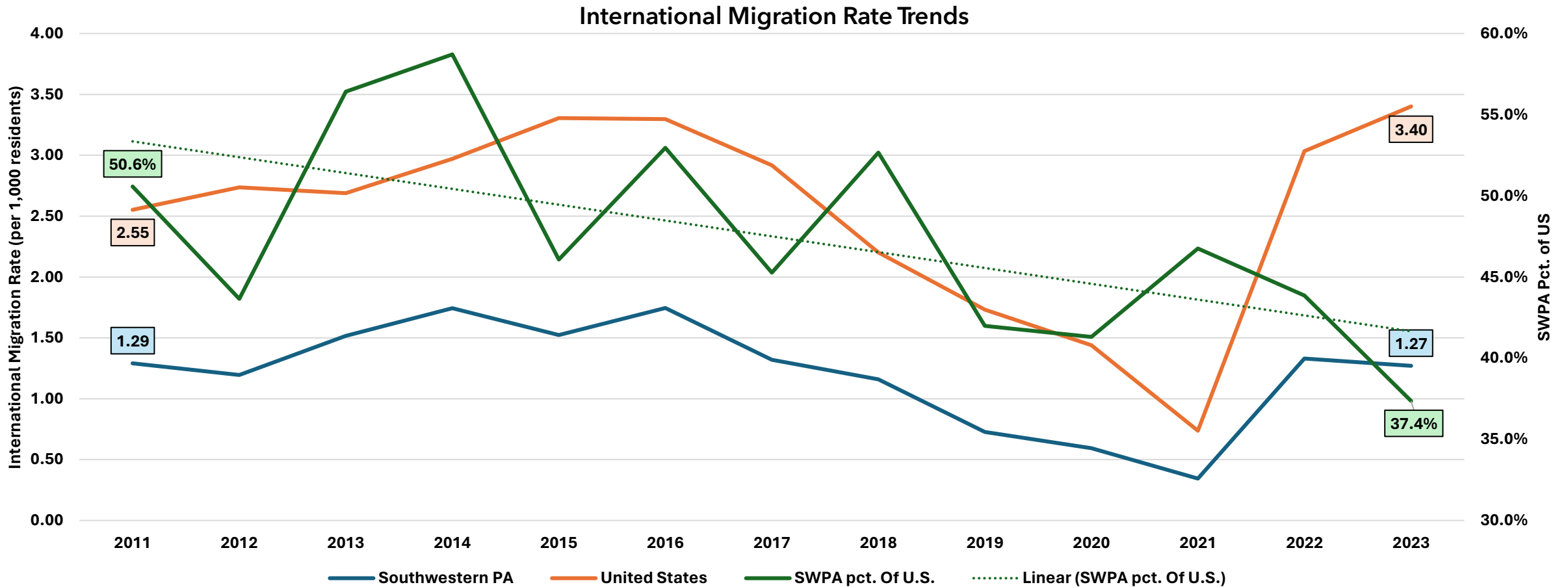
Components of Change - 2001 to 2023



Note: Components reflect year of initial data release and do not account for any subsequent revisions.

Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

Southwestern Pennsylvania has long lagged behind the nation in international migration and over the past decade the region has fallen further behind. In 2023, the region's international migration rate of 1.27 per thousand was a little more than one-third the nation (3.40). While the region's rate rebounded from pandemic lows and is similar to the rate recorded in 2011, the rate nationally has increased from 0.74 in 2021 to 3.40.

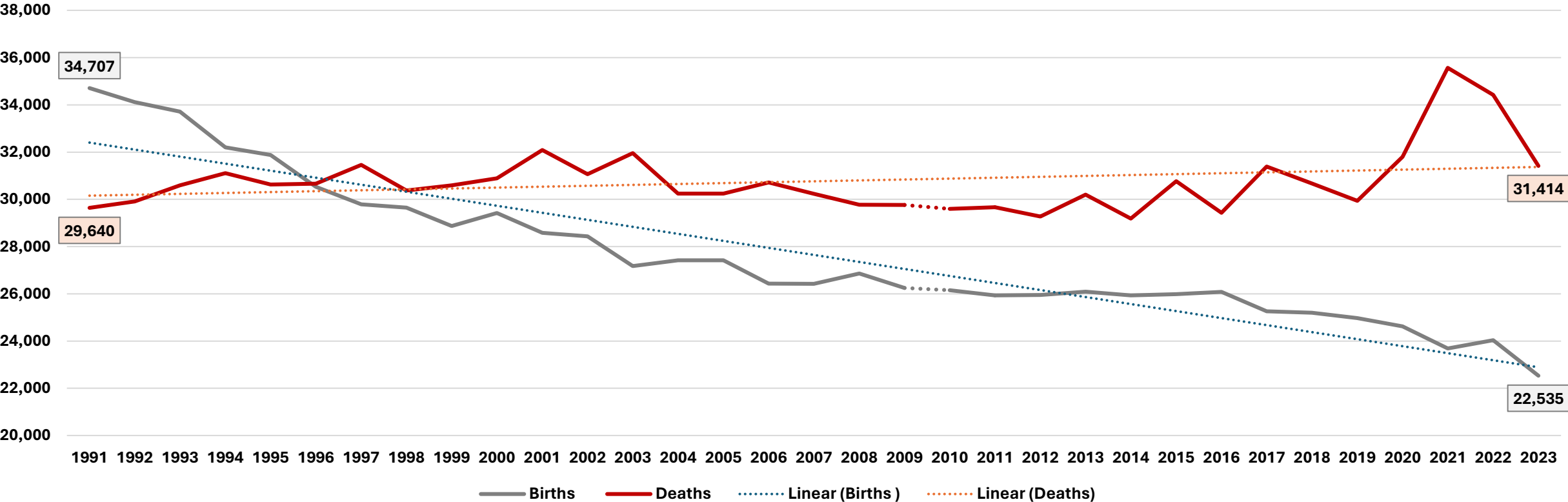


Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024



Since the mid-1990s, the region has struggled with more deaths than births leading to a natural population loss. Before spiking in 2021, as a result of the pandemic, annual deaths in the region had been steady in the 30,000 to 32,000 range and returned to that level in 2023. Meanwhile, births have steadily declined from just under 32,000 in 1995, the last year births exceeded deaths, to just 22,535 in 2023, a drop of almost 30%.

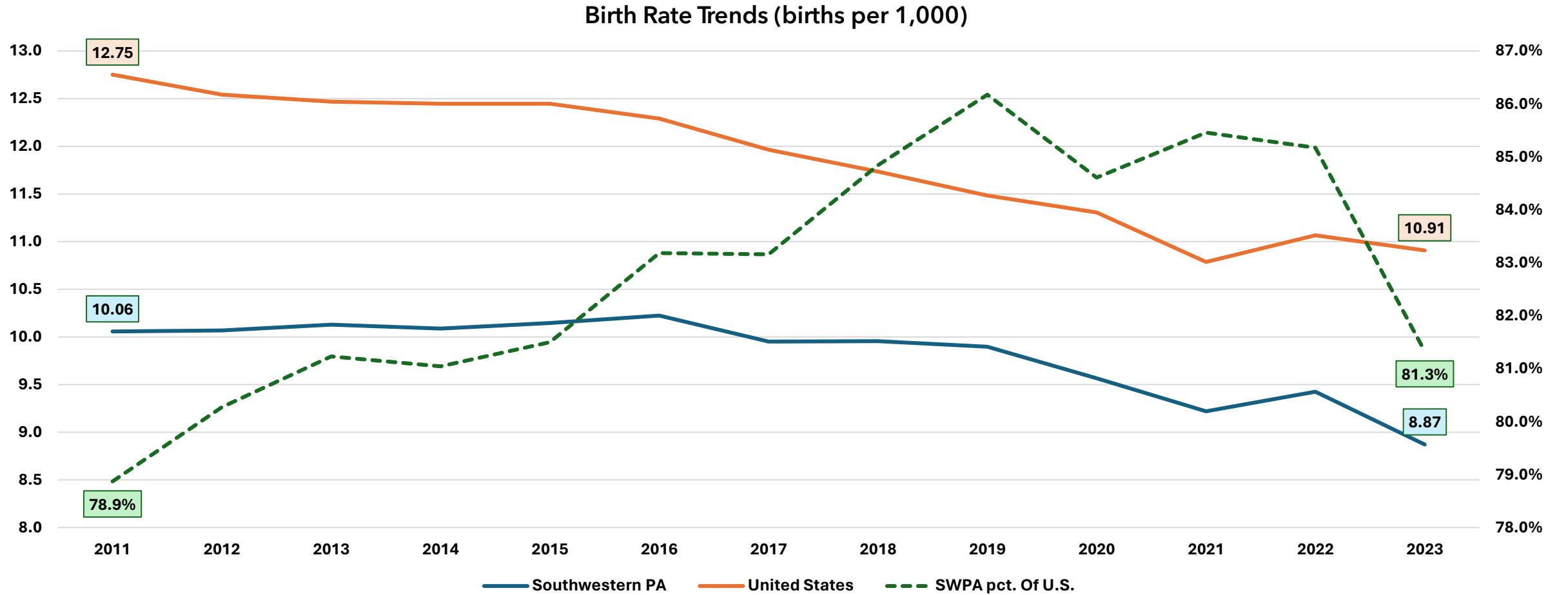
### Vital Event Trends - 1991 to 2023



Note: Components reflect year of initial data release and do not account for any subsequent revisions.

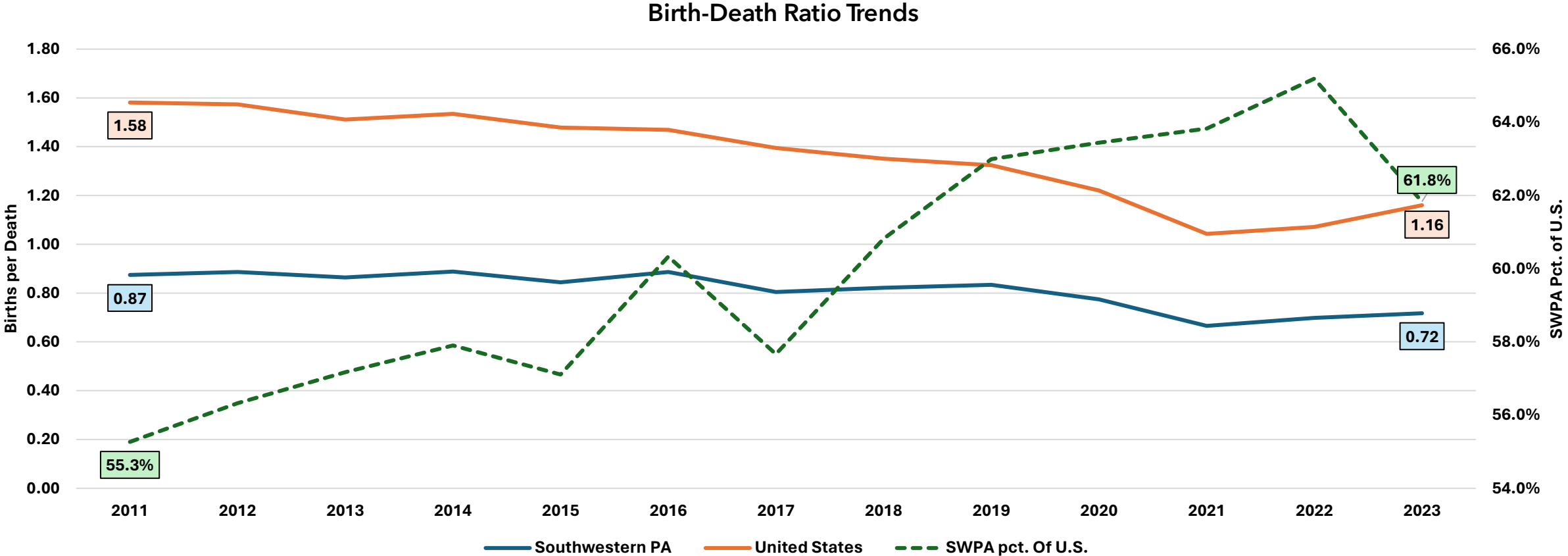
Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

Since 2011, the birthrate both regionally and nationally has been declining, with the region trailing the nation. The regional rate had remained steady at around 10.00 births per thousand of population through 2016, while the national rate steadily dropped. However, southwestern Pennsylvania began experiencing a falling birth rate in 2016, dropping from 10.22 to 8.87. While making progress to close the gap during the 2010s, the gap has since widened from 86.2% of the U.S. in 2019 to 81.3% in 2023.



Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

Between 2011 and 2021, the birth to death ratio had been declining both regionally and nationally. However, the U.S. had been declining faster than the region resulting in the gap closing between the two. Since 2020, the ratio has increased in both the region and nation as deaths dropped faster than births coming out of the pandemic, although the increase was slower in southwestern Pennsylvania.



Note: A ratio of greater than 1.00 indicates that births exceed deaths.

Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

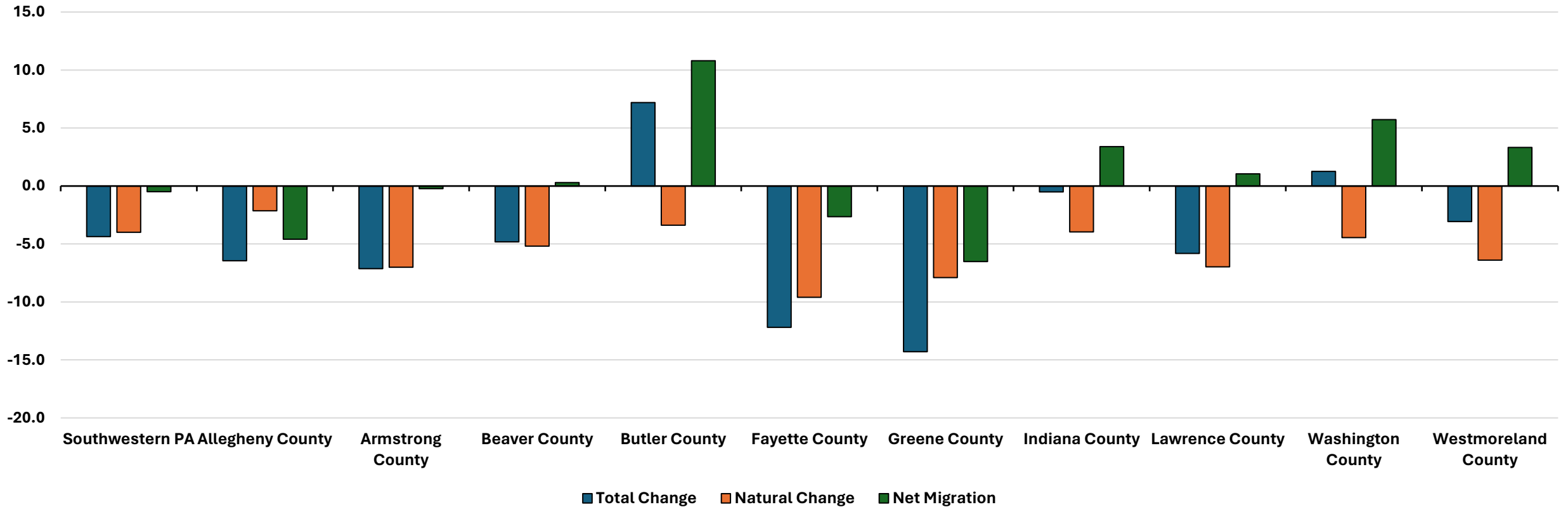
Similar to past years, nearly all the counties in the region saw decreases in population in 2023 except for Butler and Washington, which each recorded small increases. Indiana County, which had traditionally been losing population, also saw what amounts to an unchanged population. Allegheny County recorded the third largest decrease for the third consecutive year trailing Fayette and Armstrong Counties.

County	2023	2022 to 2023		2020 to 2023	
		#	%	#	%
Allegheny	1,224,825	-7,780	-0.6%	-25,711	-2.1%
Armstrong	64,074	-630	-1.0%	-1,486	-2.3%
Beaver	165,631	-106	-0.1%	-2,598	-1.5%
Butler	198,413	1,045	0.5%	4,639	2.4%
Fayette	123,915	-1,453	-1.1%	-4,910	-3.8%
Greene	34,357	-172	-0.5%	-1,596	-4.4%
Indiana	83,094	30	0.0%	-139	-0.2%
Lawrence	84,472	-340	-0.4%	-1,599	-1.9%
Washington	210,232	292	0.1%	863	0.4%
Westmoreland	351,163	-835	-0.2%	-3,509	-1.0%
<b>TOTAL</b>	<b>2,540,176</b>	<b>-9,949</b>	<b>-0.4%</b>	<b>-36,046</b>	<b>-1.4%</b>

Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

While all counties experienced natural population loss, negative net migration was a larger factor driving the population loss in Allegheny County, which tends to have a younger population than the other counties in the region. Butler and Washington, which had traditionally been the only counties to experience positive net migration, have been joined by Beaver, Indiana and Westmoreland as having more people move in than move out.

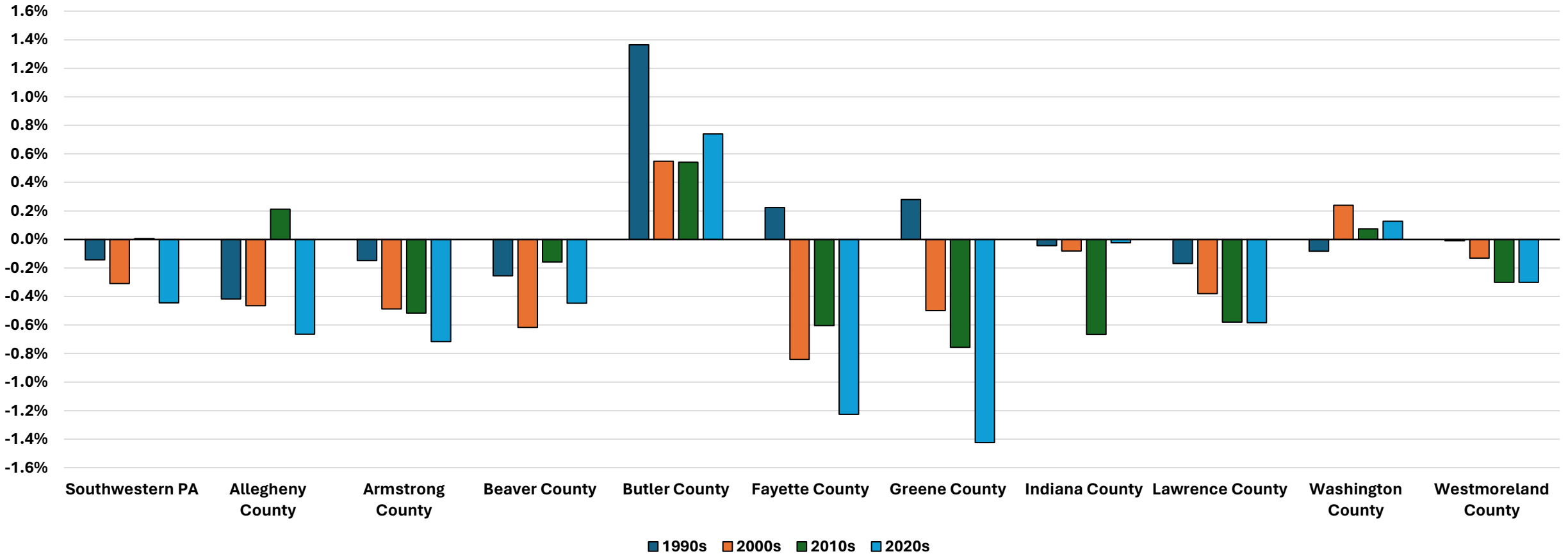
Average Annual Rate of Change per 1,000 Residents (2020 to 2023)



Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

While the regional population growth rate was flat in the 2010s as gains in Allegheny, Butler and Washington Counties offset losses in the other counties, the annual rate of population loss over the past three years is accelerating. While only based on three years of data, the current decade is pointing to a continuation of an accelerating population loss in several counties including Allegheny, Armstrong, Fayette, Greene, Lawrence and Westmoreland.

### Compound Annual Growth Rate by Decade



Source: U.S. Census Bureau - 2023 Population Estimates, compiled April 2024

# Ask a question/give your feedback.

Reach out to this report's research lead.

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