

Lessons from 2025 Population Estimates



August 2026

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Today's plan

Outline

- About population estimates
- Steady, and advancing outward, growth
- What factors are at play?
- Looking ahead



About Met Council population estimates



What estimates are (and are not)

Decennial Census

- Complete count of people
- Every 10 years
- Limited characteristics

American Community Survey (ACS)

- Characteristics from sample of people
- Every year, 1 year delay in currency
- Focus on characteristics

Population Estimates

- Approximation of population
- Every year, 1 year delay in currency
- No characteristics, focus on totals

Who's involved?

- Population estimates for seven-county region

Metropolitan Council



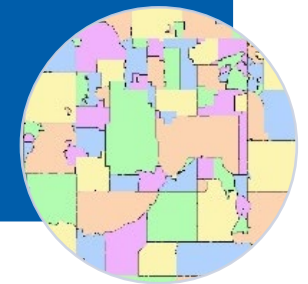
- Population estimates for Greater Minnesota (outside 7-county region)

State Demographic Center



- Supply data
- Review preliminary estimates
- Comment if desired

Local governments



Population estimates are governed by Minnesota Statutes [4A.02](#) and [473.24](#).

The estimates timeline

Preliminary estimates (by June 1)

- Transmitted to highest elected and appointed officials via email and US Mail
- Detailed reports
- Spreadsheets

Local review (by June 24)

- 5 comments resolved by answering questions
- 1 comment resulted in revision

Final estimates (by July 15)

- Local Government Aid
- State Aid for Local Transportation
- Tax-base sharing (Fiscal Disparities)
- Miscellaneous local purposes

How estimates are calculated



We count every housing unit.

Permits for new builds, demos, and conversions tell a story.



Is someone living there?

Not every active unit is occupied; occupied units are called households.



How many people per occupied unit/household?

Some homes hold a large family, some a single person.



We add group quarters residents.

Dorms, care facilities, and other group housing.



Based off direct Met Council survey data



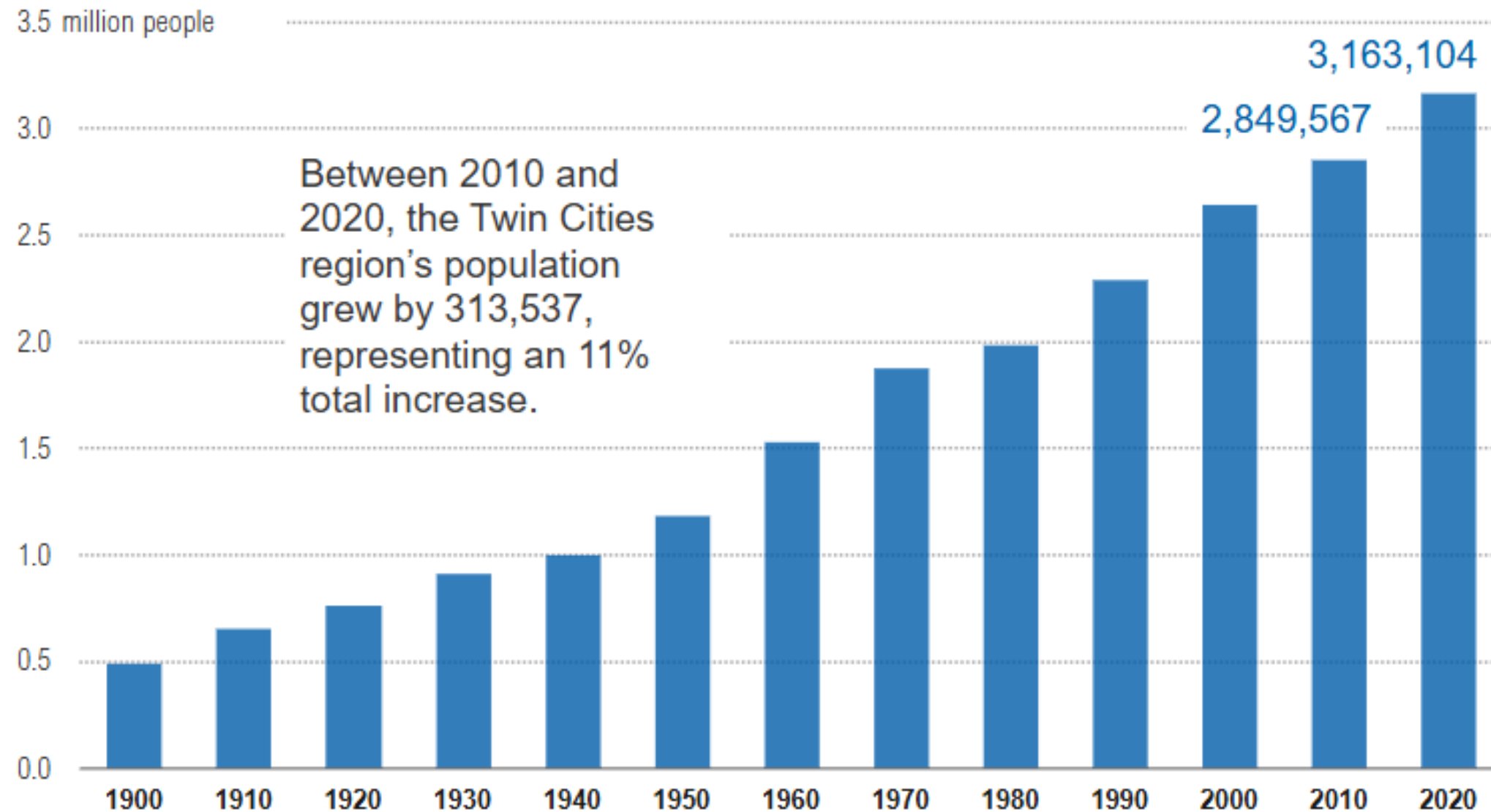
Requires estimation, via ACS + METC analysis

**What the
estimates show:**

**Steady growth,
advancing
outward**



2010-2020: Steady population growth



Source: Metropolitan Council staff analysis of U.S. Census Bureau data. "Twin Cities region" represents all seven counties in the jurisdiction of the Metropolitan Council (Minn. Stat. § 473.121, subd. 2)

2025 population estimates

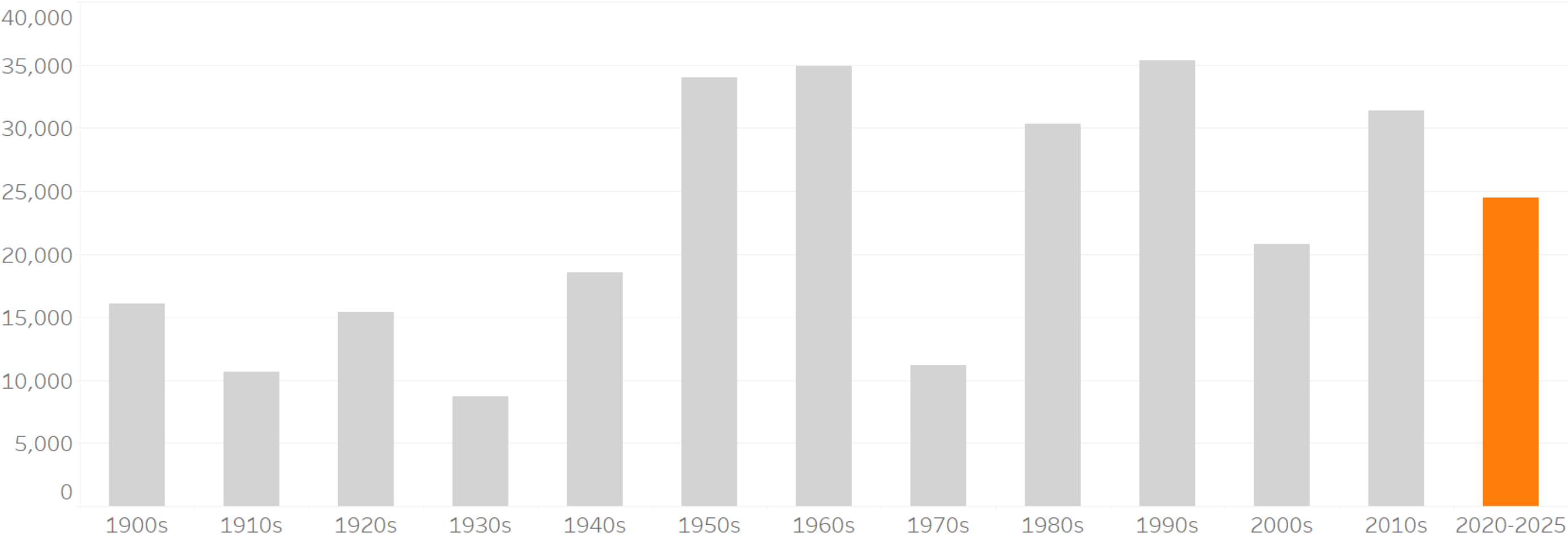
As of April 1, 2025, the Twin Cities region had:

	Estimate for April 1, 2025	Change since 2020 Census	Percent change since 2020 Census
Housing units	1,397,809	+102,946	+8.0%
Households	1,321,723	+82,197	+6.6%
People	3,285,554	+122,450	+3.9%

Source: Metropolitan Council population estimates for April 1, 2025. "Twin Cities region" represents all seven counties in the jurisdiction of the Metropolitan Council (Minn. Stat. § 473.121, subd. 2)

Region is still growing, but not as much

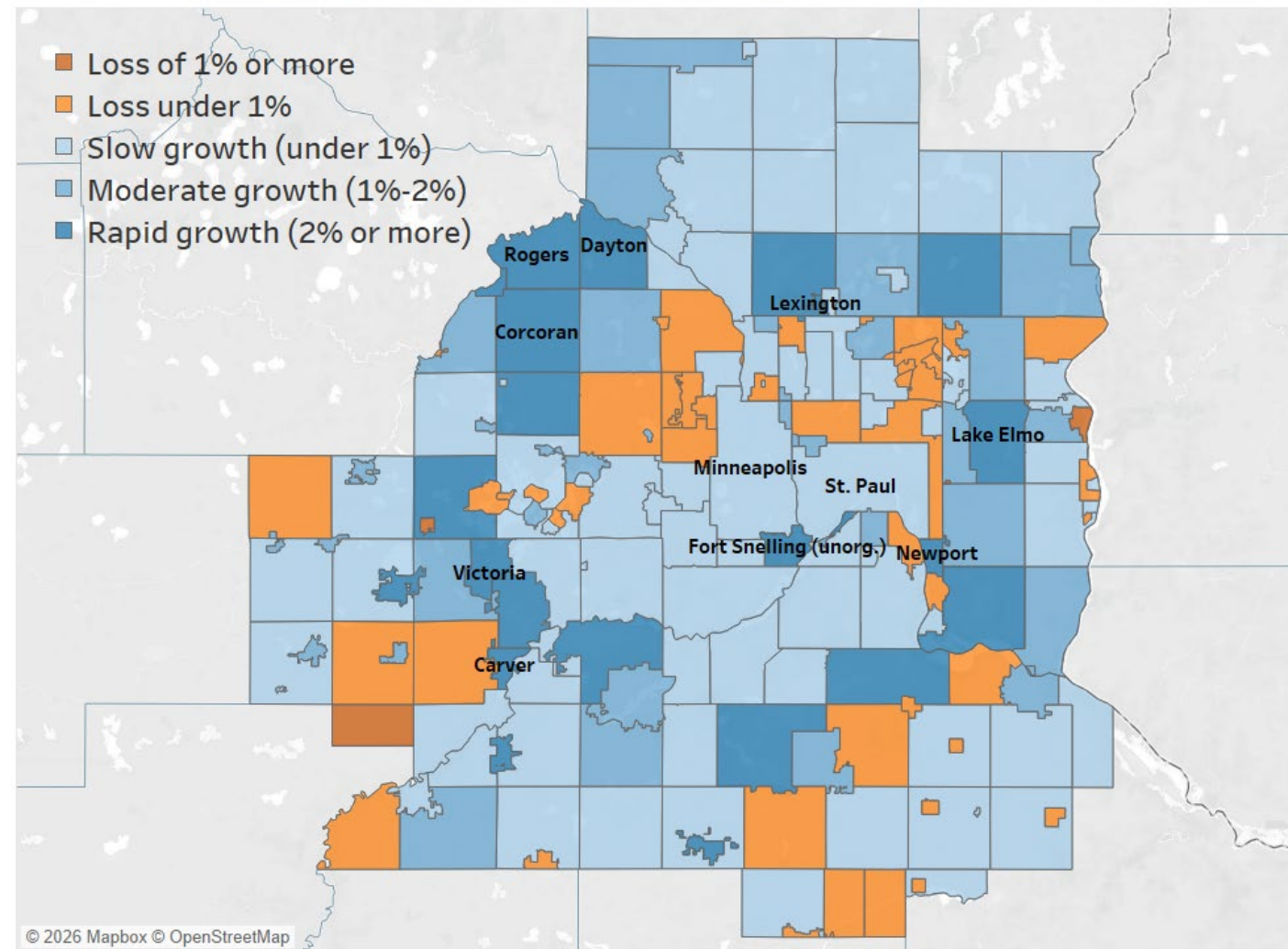
Average annual population growth, by decade



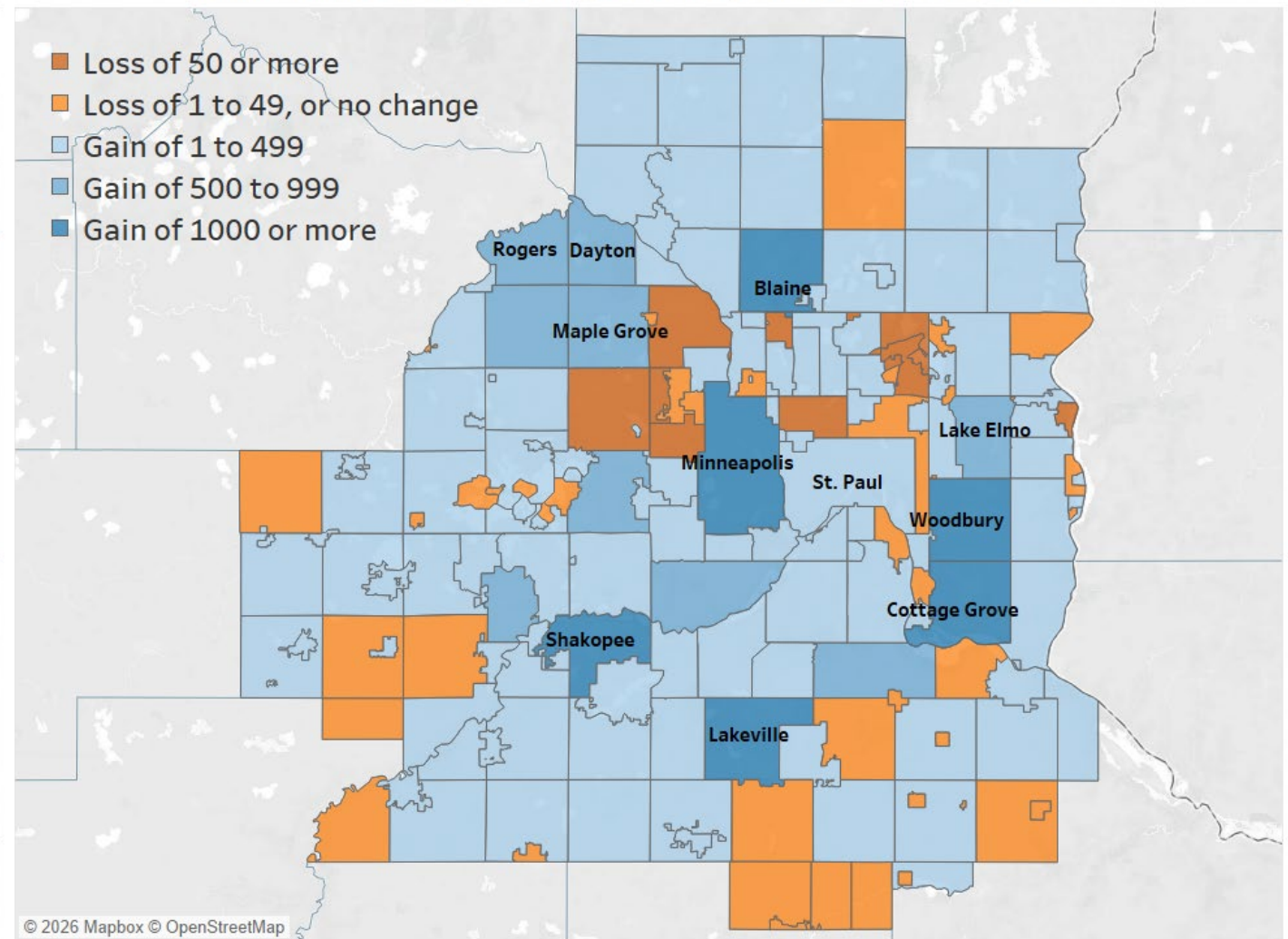
Source: Metropolitan Council staff analysis of U.S. Census Bureau data via the National Historical Geographic Information System (NHGIS); Metropolitan Council population estimates for April 1, 2025. "Twin Cities region" represents all seven counties in the jurisdiction of the Metropolitan Council (Minn. Stat. § 473.121, subd. 2)

Here's where growth is happening the most, by rate (left) and magnitude (right)

Average annual % change in population, 2020-2025



Annual Average Change in Population, 2020-2025



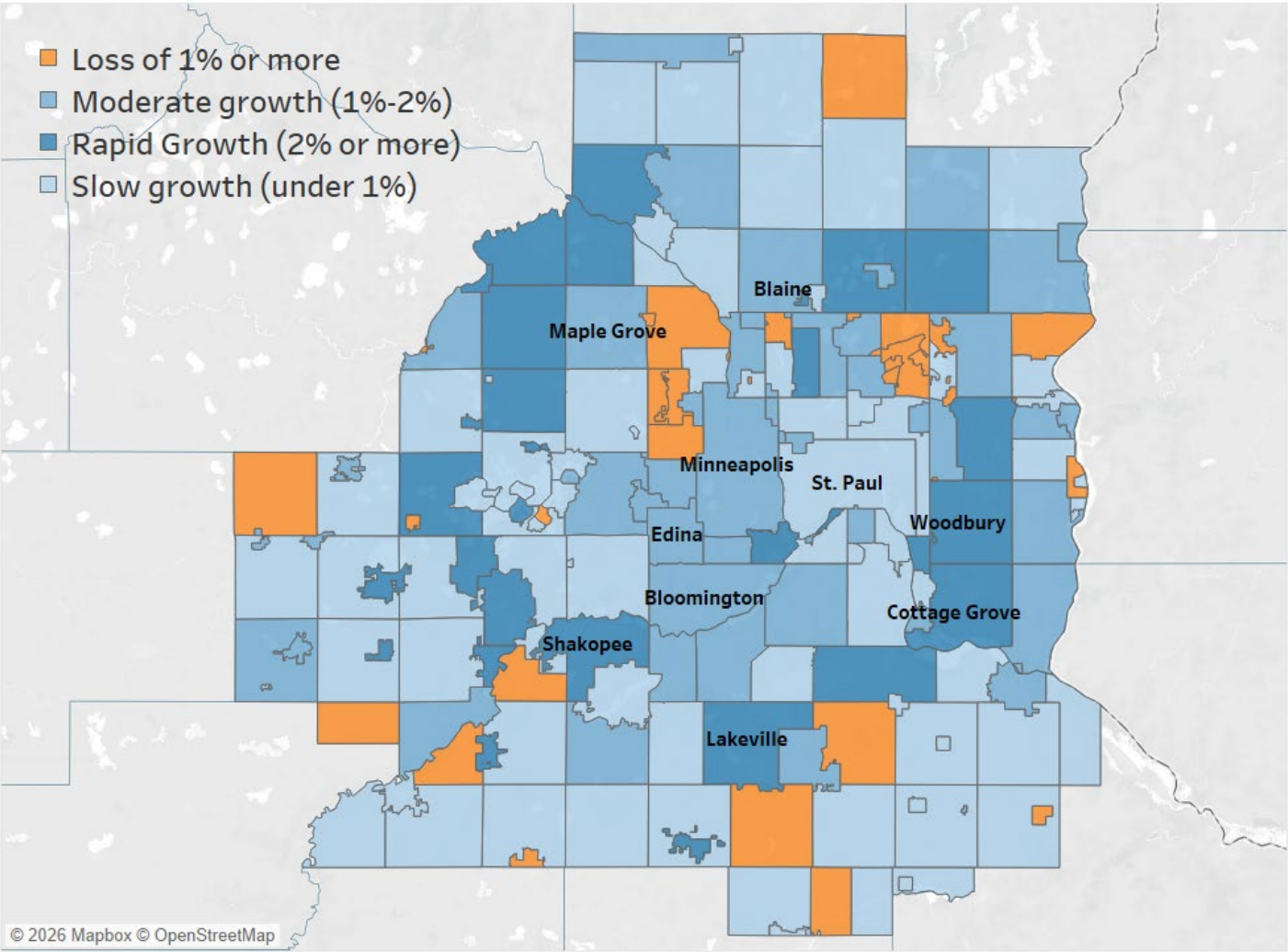
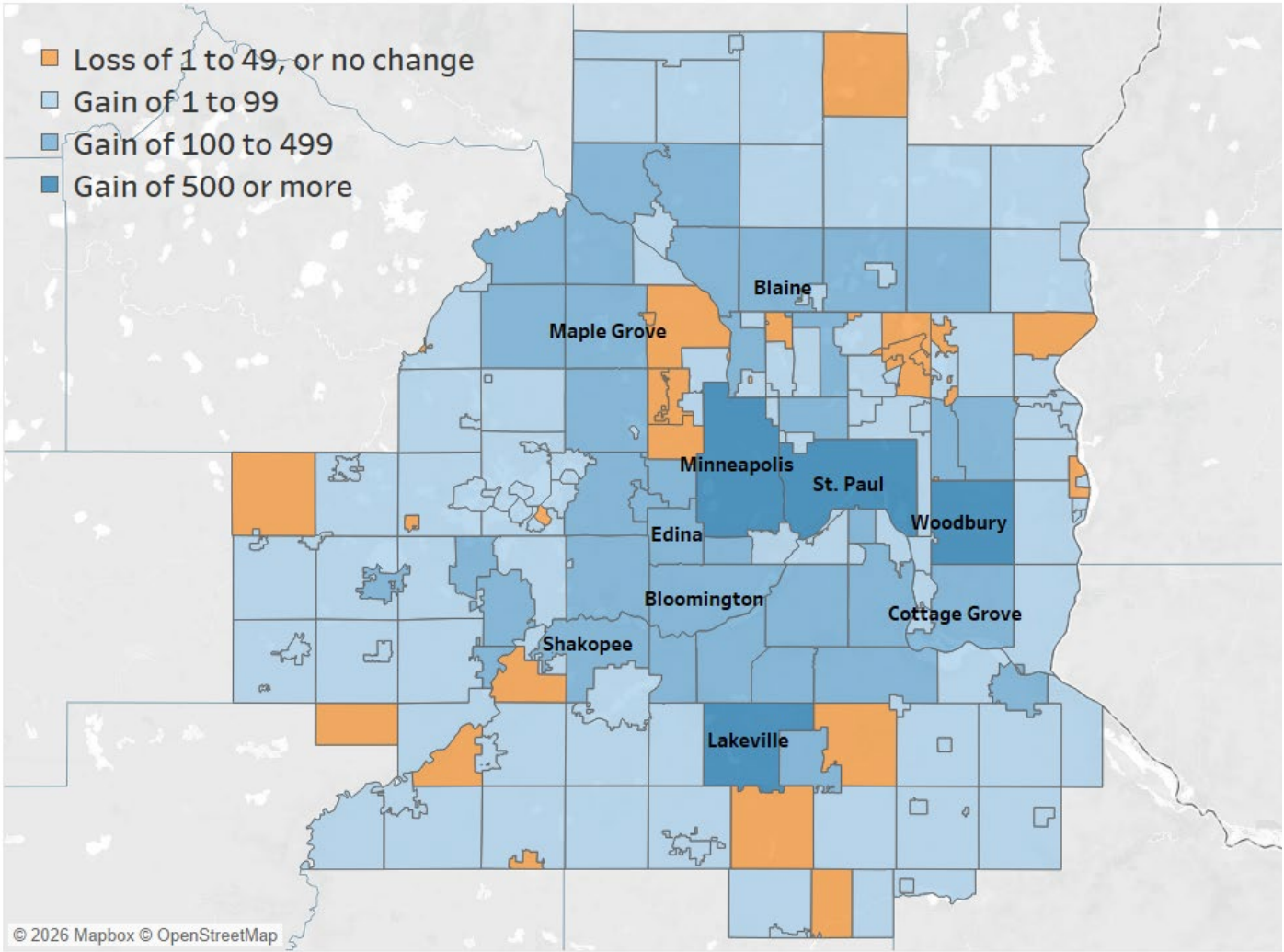
Note: Labels identify cities with the ten largest annual population increase (%/rate to left, raw number to right). Saint Paul was not in the top 10 in the magnitude map but is included for orientation purposes.

Source: Metropolitan Council staff analysis of U.S. Census Bureau data; Metropolitan Council annual population estimates for April 1, 2025

Most cities are gaining households, and Minneapolis/St. Paul gained more than all other cities

Annual Average Change in Households, 2020-2025

Average annual % change in households, 2020-2025



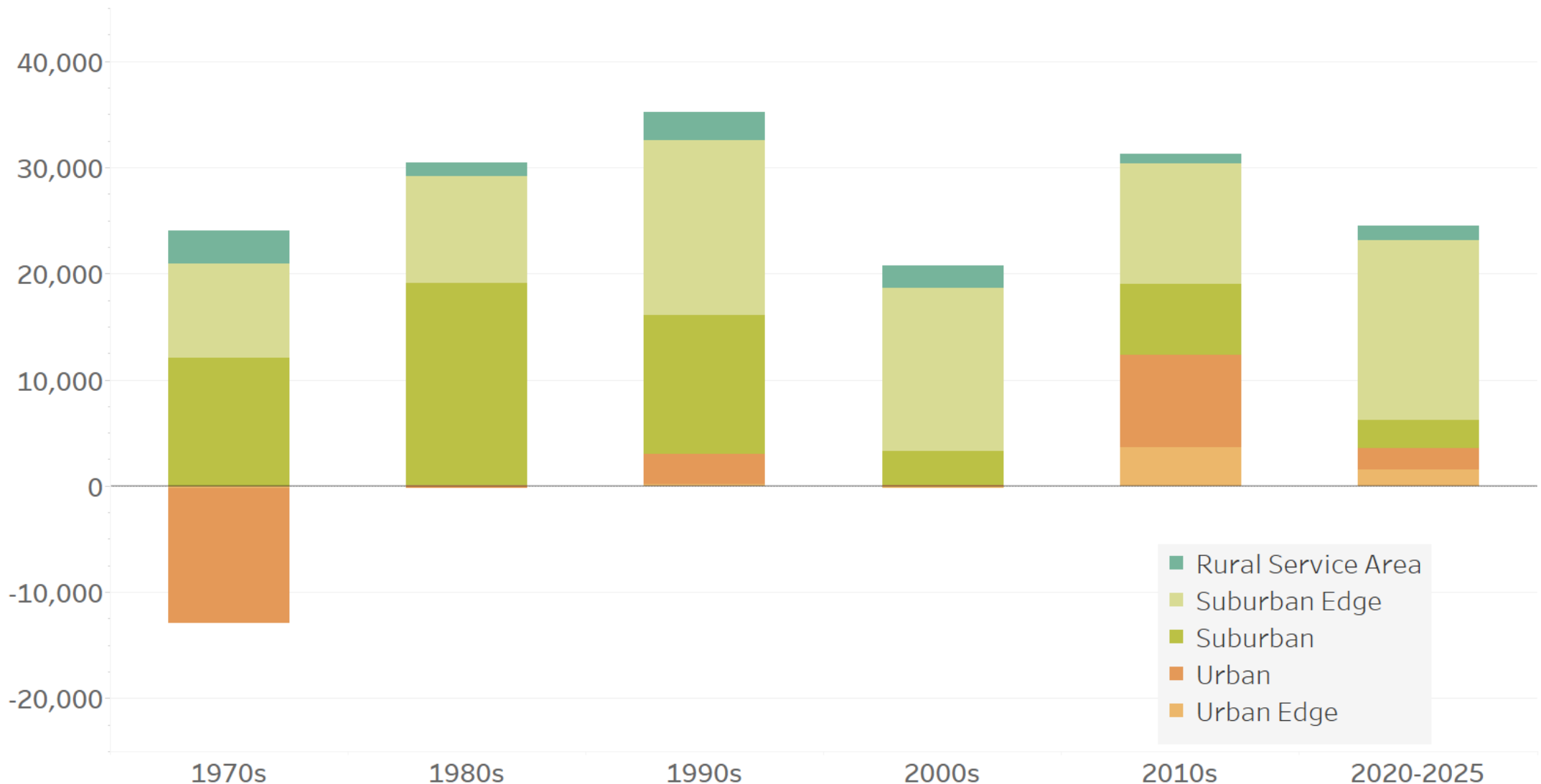
Note: Labels identify cities with the ten highest growth rates as well as Minneapolis and Saint Paul (for orientation purposes).

Source: Metropolitan Council staff analysis of U.S. Census Bureau data; Metropolitan Council annual population estimates for April 1, 2025

2020-2025: Growth not spatially balanced; recent growth is concentrated in suburban edge communities



Average annual population change, 2020-2025

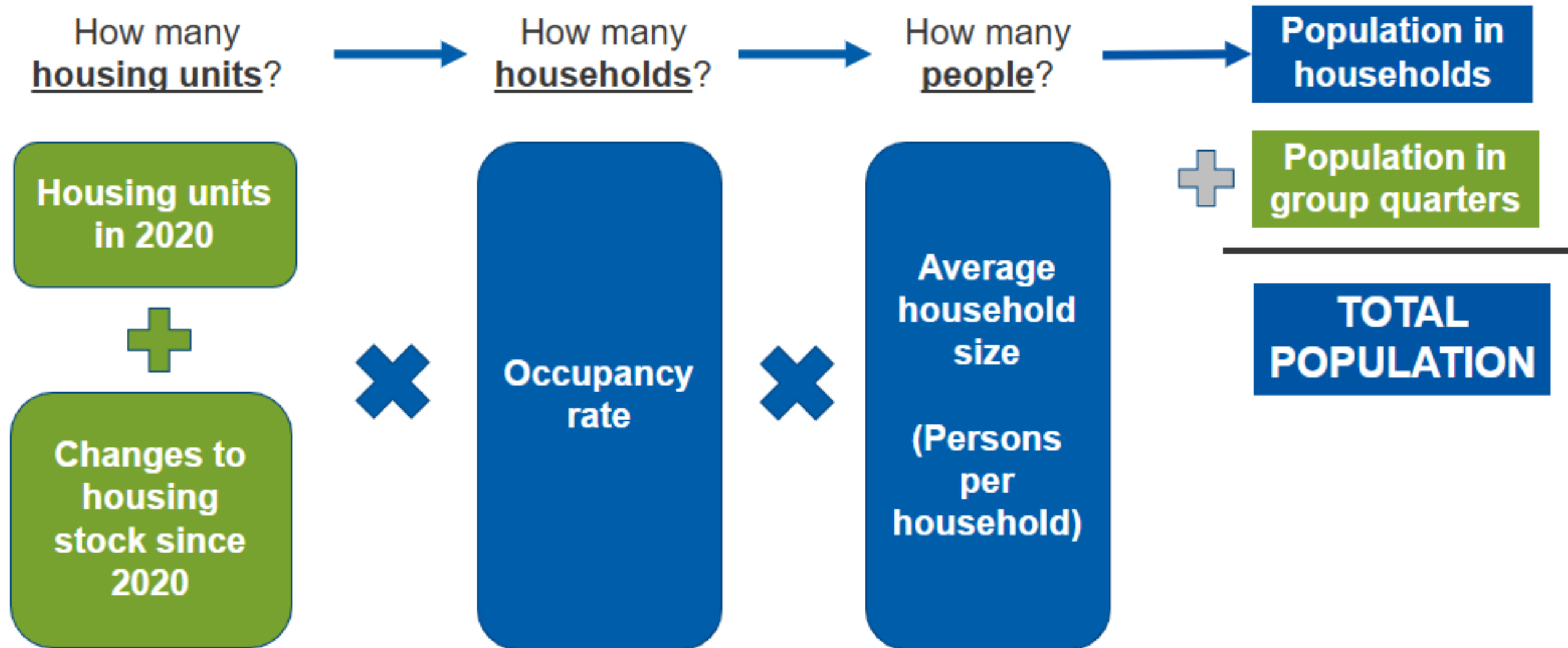


Source: Metropolitan Council staff analysis of U.S. Census Bureau data; Metropolitan Council population estimates for April 1, 2025. [Click here](#) for a map of Imagine 2050 Community Designations.

How does this
growth look?



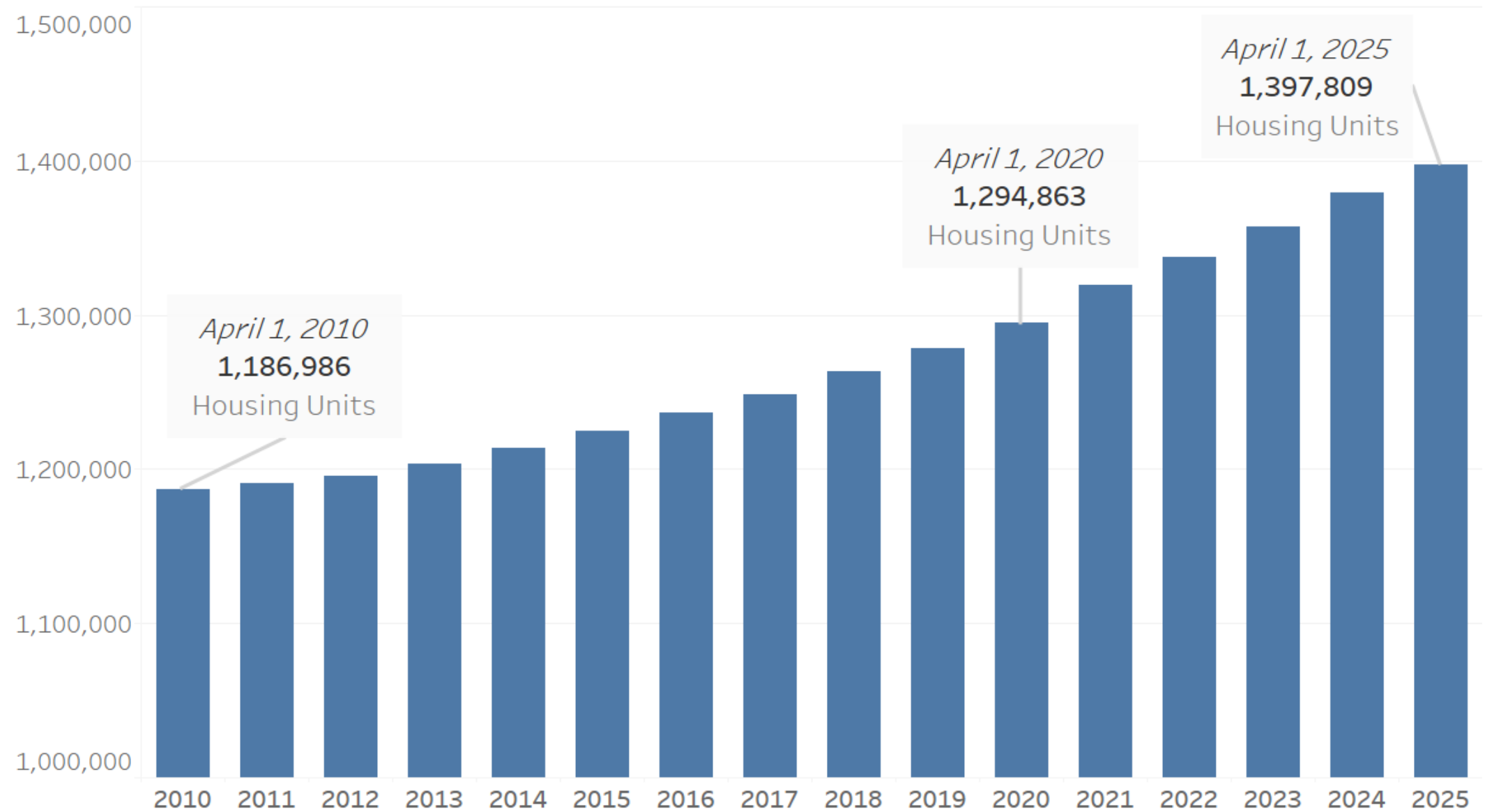
How estimates are calculated (refresher)



Housing production still strong



Number of Housing Units, 2010-2025



Source: U.S. Census Bureau (2010, 2020) and Metropolitan Council housing stock estimates (all other years)

Occupancy is down slightly from 2020...

As of April 1, 2025, the Twin Cities region had:

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Housing units	1,397,809	+102,946	+8.0%
Households	1,321,723	+82,197	+6.6%
People	3,285,548	+122,450	+3.9%

Occupancy rate fell from 95.7%
in 2020 to 94.6% in 2025.

Source: Metropolitan Council population estimates for April 1, 2025. “Twin Cities region” represents all seven counties in the jurisdiction of the Metropolitan Council (Minn. Stat. § 473.121, subd. 2)

... and households are getting smaller



As of April 1, 2025, the Twin Cities region had:

	Estimate for April 1, 2025	Change since 2020 Census	Percent change since 2020 Census
Housing units	1,397,809	+102,946	+8.0%
Households	1,321,723	+82,196	+6.6%
People in households	3,223,359	+121,375	+3.9%

Average household size fell from 2.50 in 2020 to 2.44 in 2025.

Source: Metropolitan Council population estimates for April 1, 2025. “Twin Cities region” represents all seven counties in the jurisdiction of the Metropolitan Council (Minn. Stat. § 473.121, subd. 2)

Domestic and international migration trends

 The Minnesota Star Tribune

News

NEWS & POLITICS

Minnesota gained more people from other states in 2025, a first this decade

The state's overall population growth slowed last year, however, due to fewer international immigrants.

By Evan Ramstad
The Minnesota Star Tribune

JANUARY 27, 2026 AT 3:34PM

 The Minnesota Star Tribune

NATION

Immigration slowdown hits every metro area in the U.S., census shows

Large urban counties and the border were the most affected. And in three-quarters of U.S. counties, population growth either slowed or turned negative.

By Jeff Adelson and Amy Qin
The New York Times

MARCH 26, 2026 AT 7:46AM

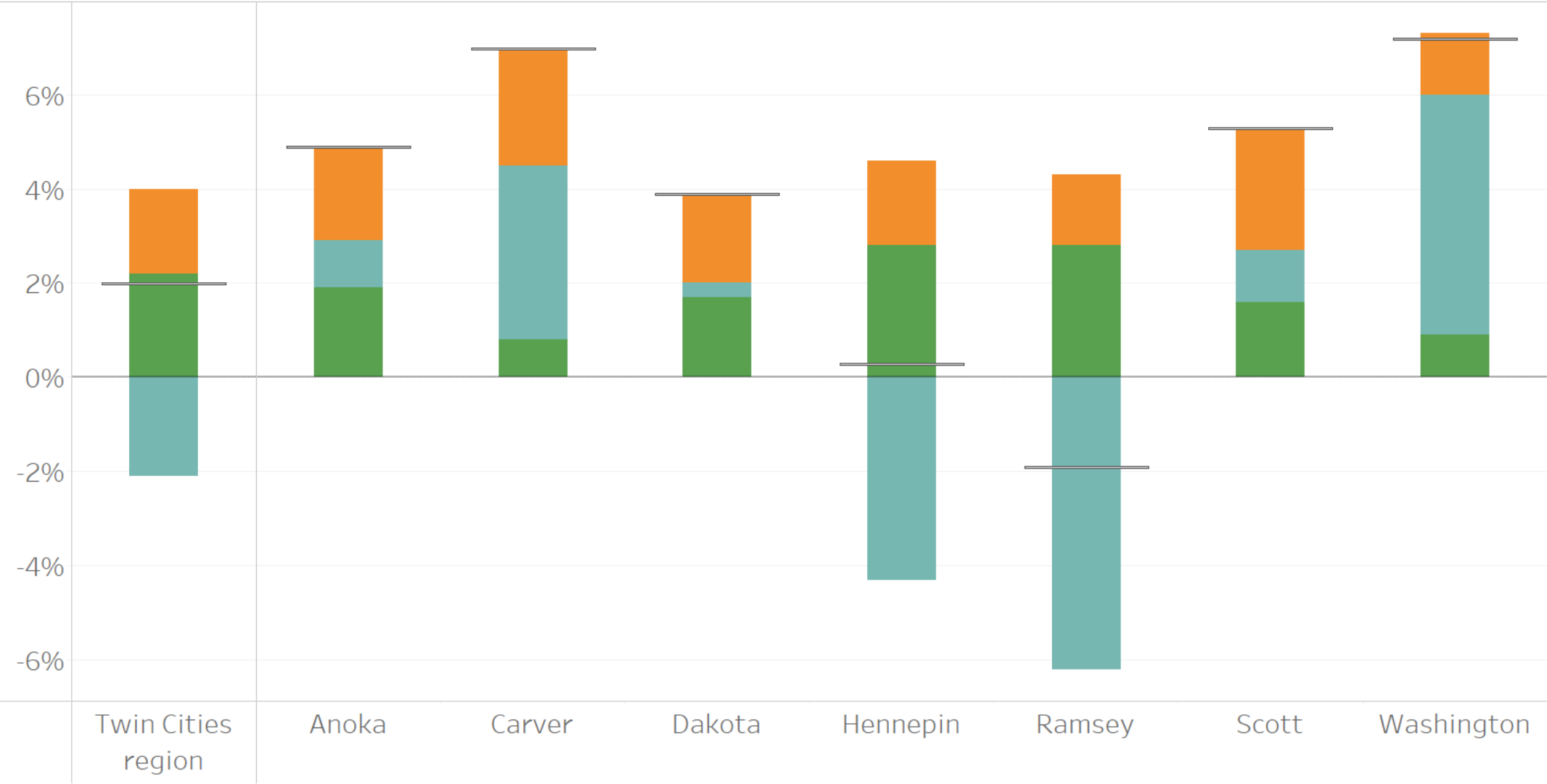
- In 2025, Minnesota received a net influx of residents from other states for the first time since 2018, and just the third time in the past 15 years.
- However, in a state where, historically, roughly two thirds of our population growth comes from international migration, a federal immigration policy that restricts this migration or ratchets up deportations would likely reduce this important source of growth.

Migration trends vary across the metro



2020-2025 net % change in population

Births and deaths Migration inside US Migration outside US

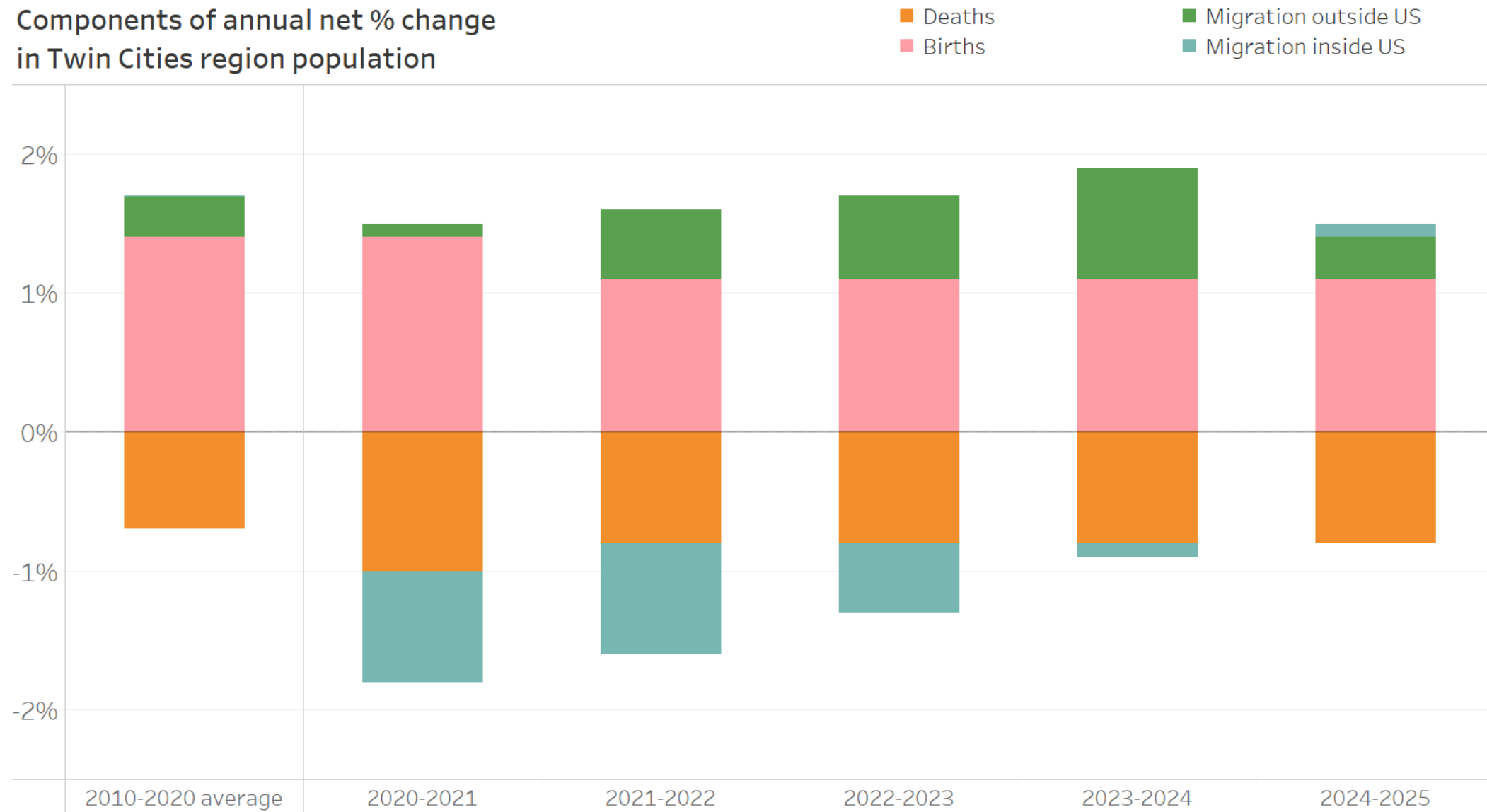


Source: U.S. Census Bureau, Population Division, Annual and Cumulative Estimates of the Components of Resident Population Change for Counties in Minnesota: April 1, 2020 to July 1, 2025 (CO-EST2025-COMP-27)

Within the metro, migration and birth/death trends are evolving over time



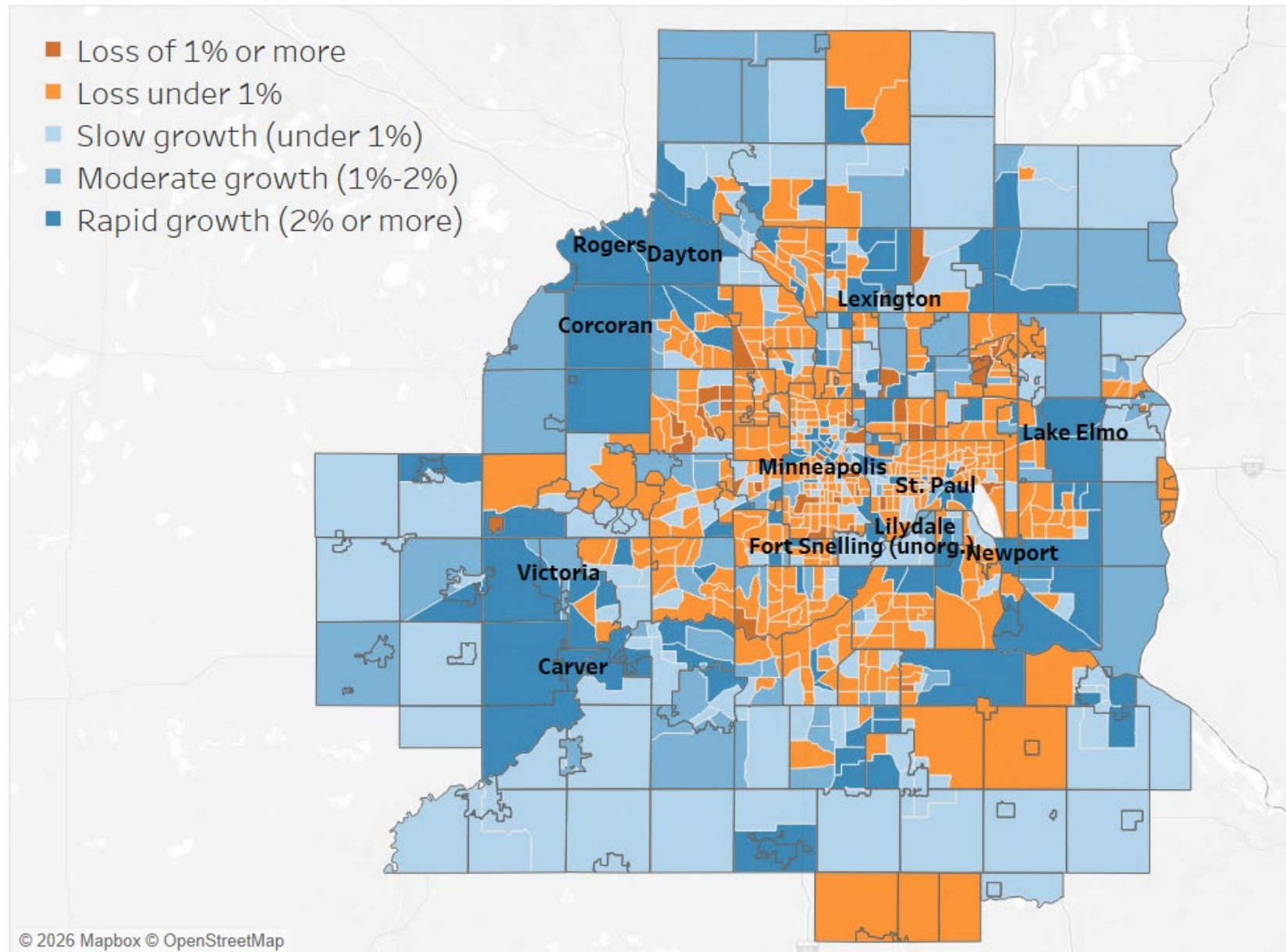
Components of annual net % change
in Twin Cities region population



Source: U.S. Census Bureau, Population Division, Annual and Cumulative Estimates of the Components of Resident Population Change for Counties in Minnesota: April 1, 2020 to July 1, 2025 (CO-EST2025-COMP-27)

Most cities have census tracts that are adding people.

Average annual % change in population, 2020-2025



- The region grew. The typical census tract didn't.
- Growth is concentrated where housing got built within cities.
- Principally, two kinds of places grew: the developing edge and the redeveloping core.

Note: Labels identify cities with the ten highest growth rates as well as Minneapolis and Saint Paul (for orientation purposes).

Source: Metropolitan Council staff analysis of U.S. Census Bureau data; Metropolitan Council annual population estimates for April 1, 2025

What might next year's estimates for 2026 look like?

Positive contributions

- Strong increase in multifamily occupancy

Negative contributions

- Immigration restrictions and deportations
- Ongoing slowdown of housing production
- Possible recession and cooling homeownership market (though it hasn't happened yet...)

Question marks

- Potential external shocks (like pandemics)
- Effects of climate change, including theorized climate migration to the Upper Midwest

Thank you

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metro council.org/populationestimates

