

# SC Population Growth – Trends and Challenges

Presented to  
Senate Special Committee on Growth

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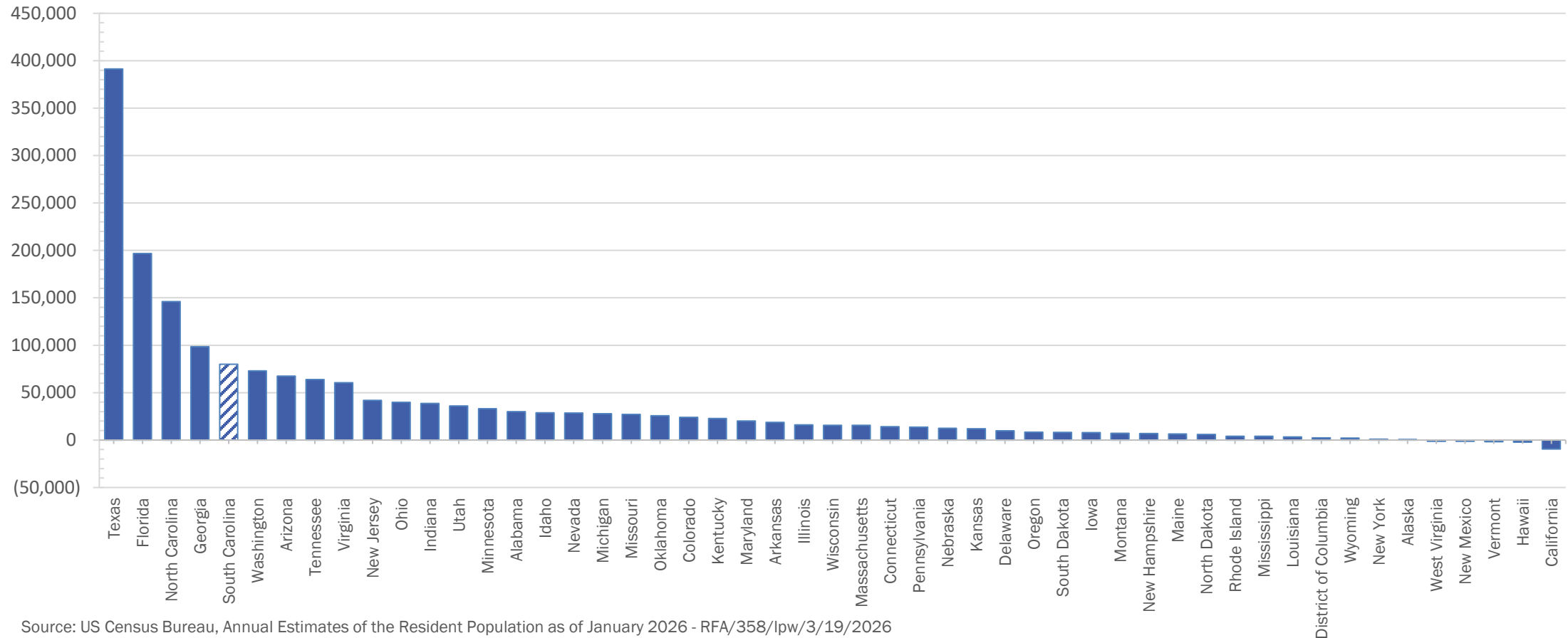
# Trends



# Population Change 2025 – SC is 5<sup>th</sup> Largest

From 2024 to 2025, SC's population increased by 79,958, or 1.46%, the highest rate of growth in the US

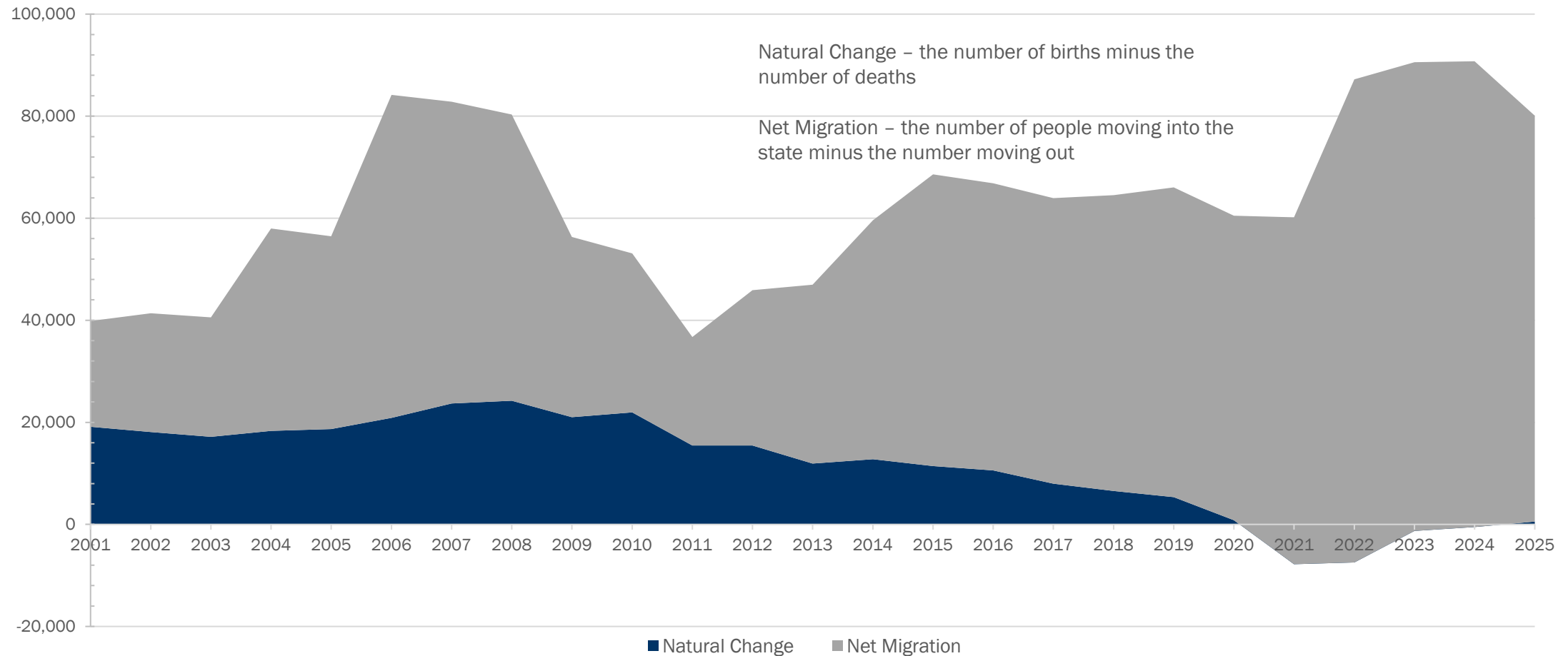
STATE RANKINGS BY TOTAL POPULATION CHANGE 2024 TO 2025



Source: US Census Bureau, Annual Estimates of the Resident Population as of January 2026 - RFA/358/lpw/3/19/2026

# Migration is Accounting for all the Growth

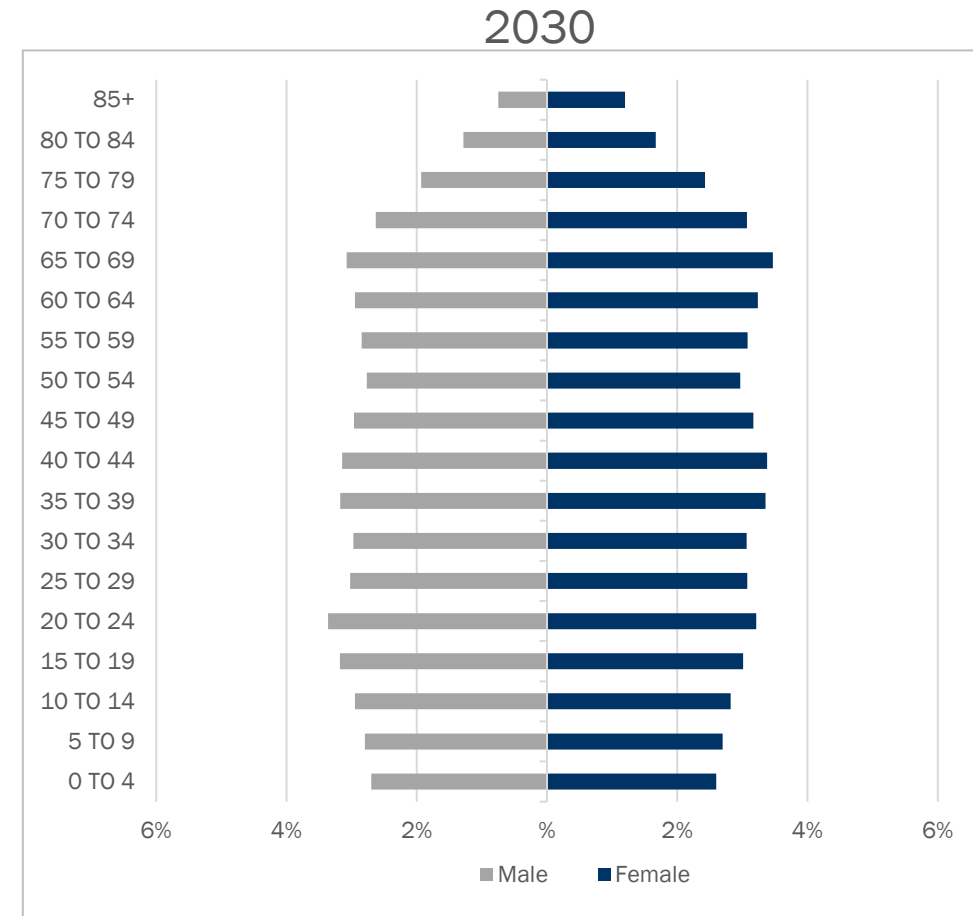
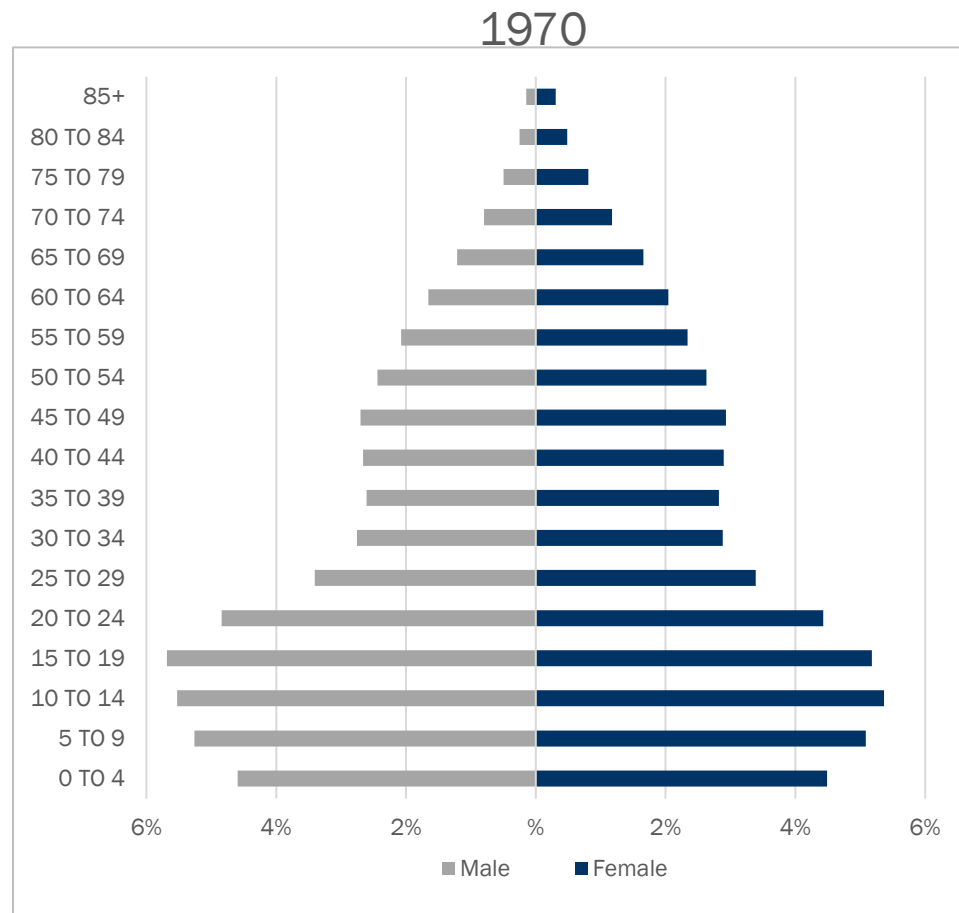
Net migration is driving population growth; natural change was negative during the pandemic but has since leveled out



Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025

# Population Pyramids – 1970 and 2030

## Changing demographics mean changing demand for services

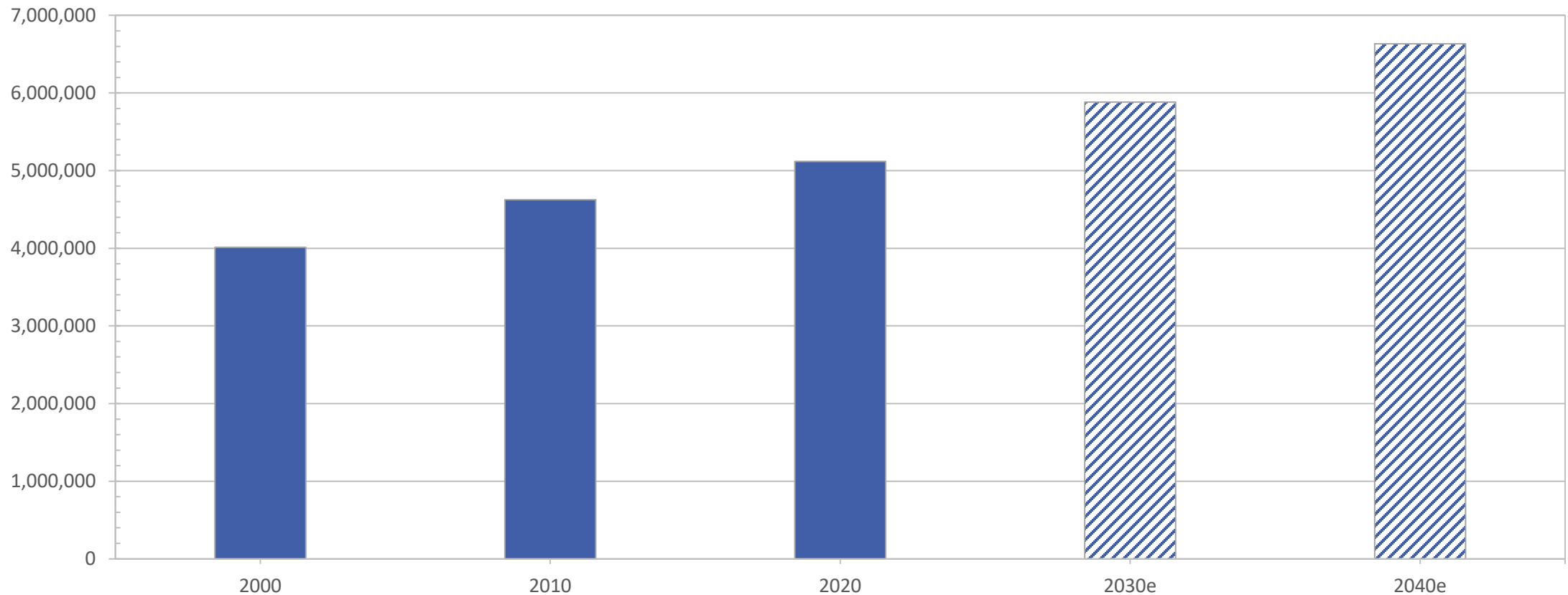


Sources: US Census Bureau 1970 Decennial Census ; SC Revenue and Fiscal Affairs Office, Vintage 2023 Population Projections

# SC Population Growth - Projections

Population is estimated to grow 29% from 5.1 million in 2020 to 6.6 million in 2040; similarly, the need for services and the total cost will increase

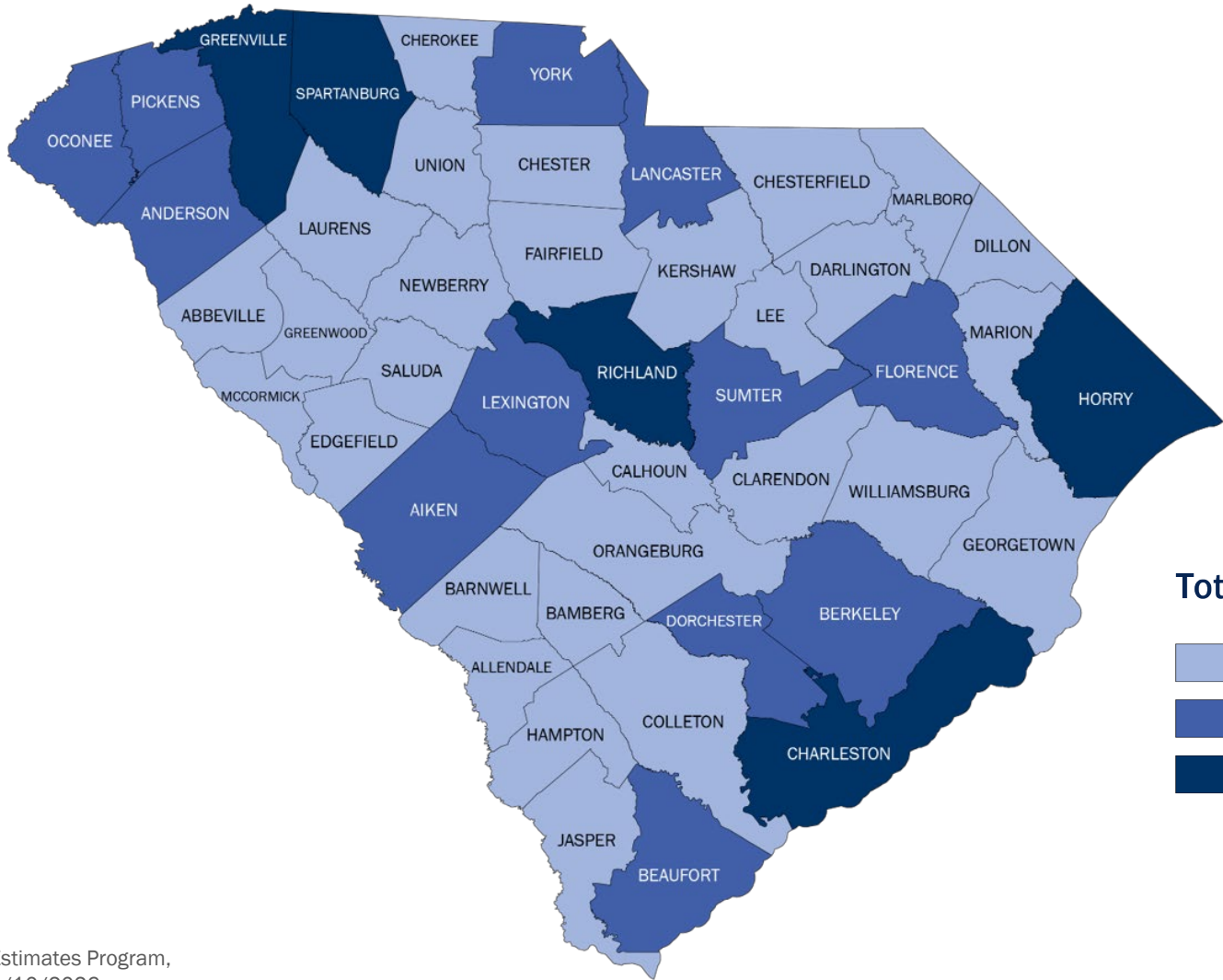
SOUTH CAROLINA POPULATION - 2000 TO 2040



Sources: US Census Bureau, Intercensal Estimates of the Resident Population, 2000, 2010, and 2020; SC Revenue and Fiscal Affairs Office, Population Projections 2030 and 2040. RFA/372/lpw/9/11/2025

# SC Population Distribution by County - 2025

## Five counties account for 40% of total population



### Total Population

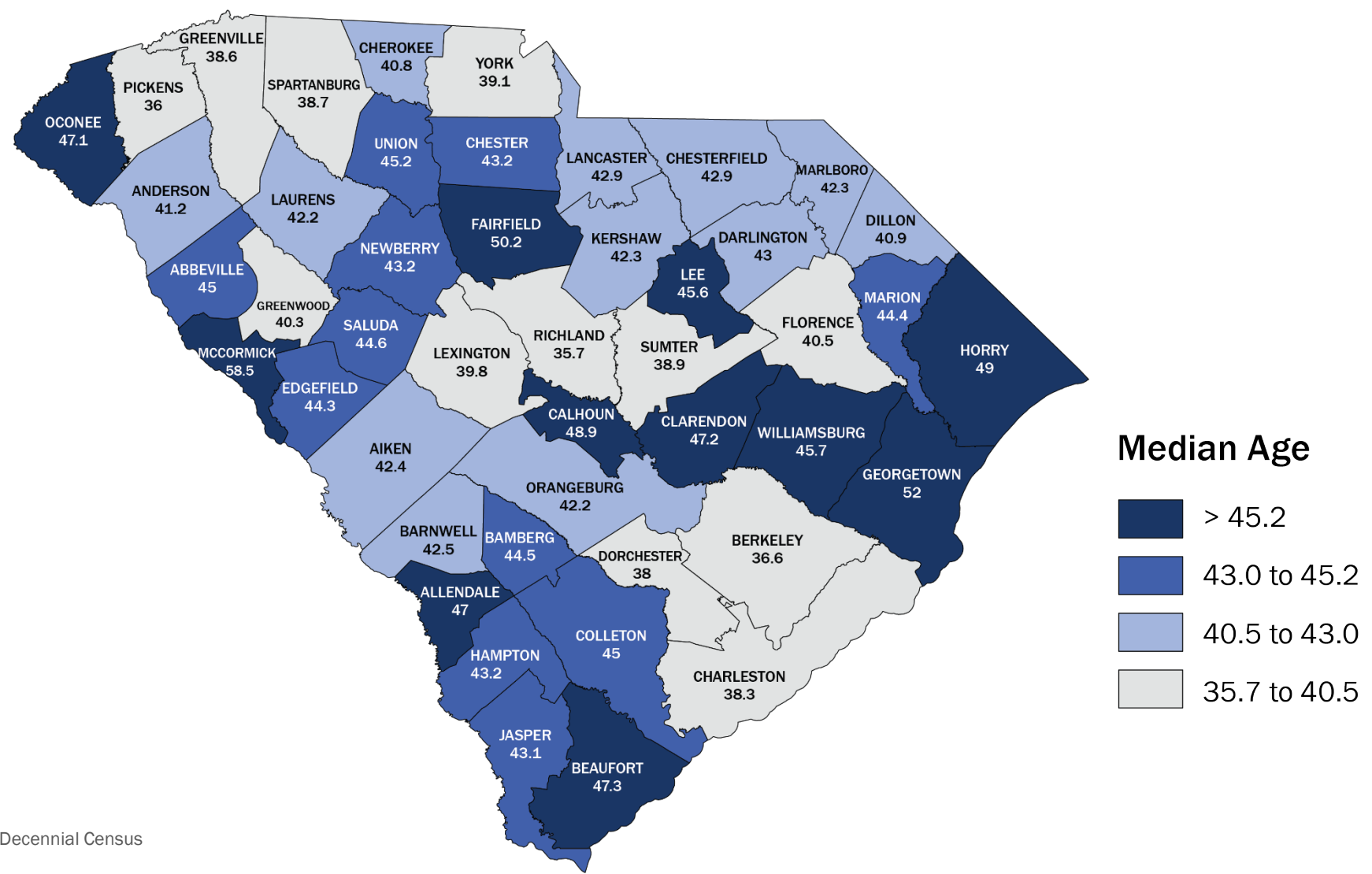
- Lowest 20%: 7,355 - 83,177
- Middle 40%: 83,178 - 317,588
- Upper 40%: 317,589 - 583,125



Source: US Census Bureau Population Estimates Program,  
Vintage 2025 Postcensal Estimates RFA/10/2026

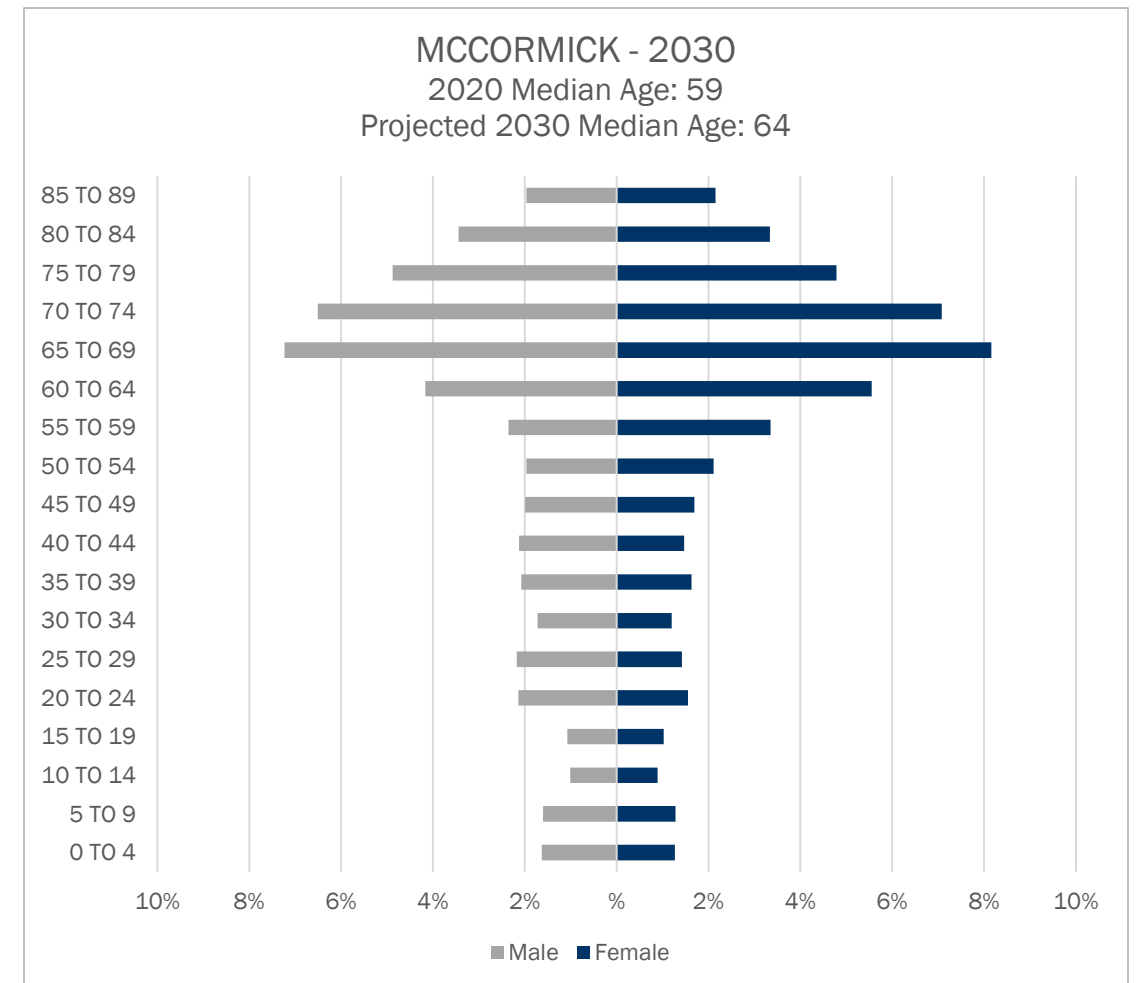
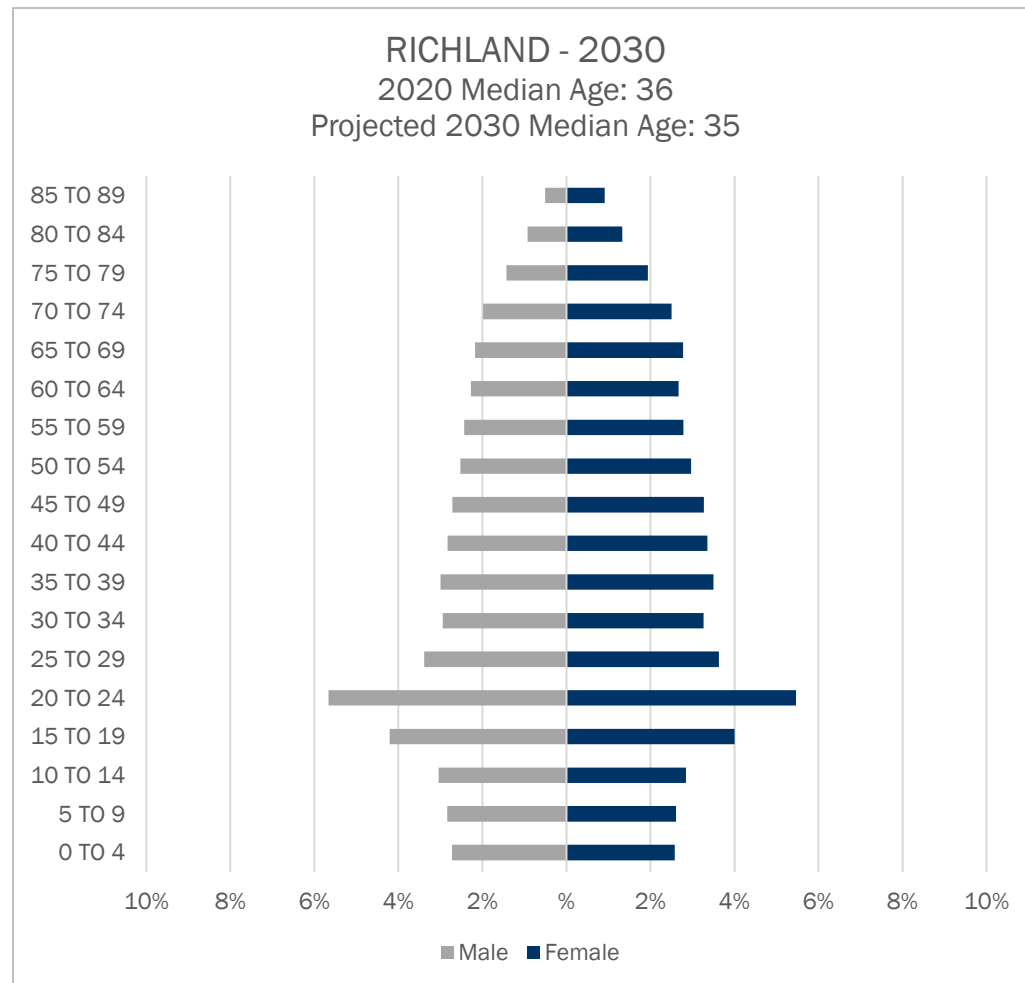
# Median Age by County – 2020

The median age ranged from 35.7 to 58.5



Source: US Census Bureau, 2020 Decennial Census

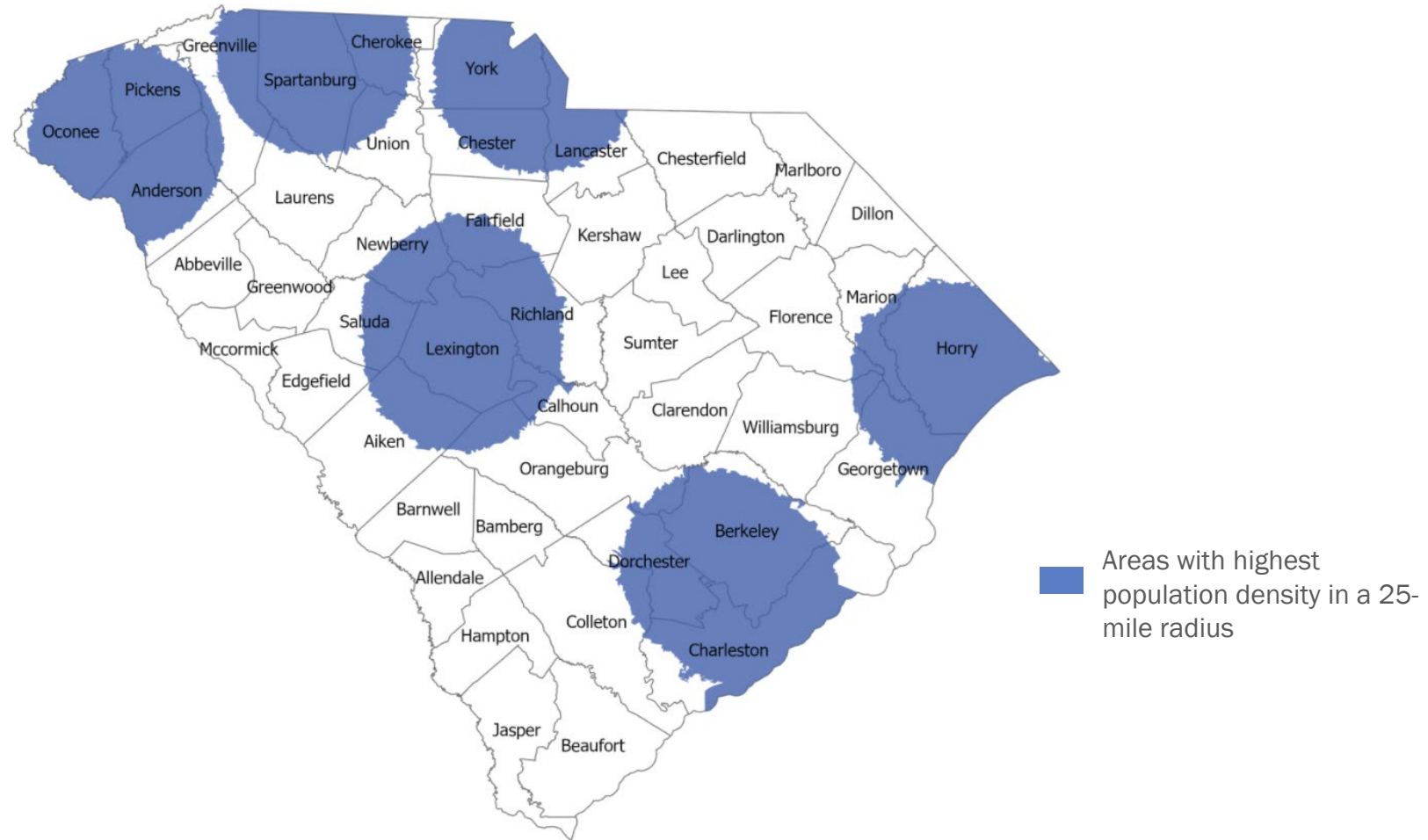
# Population Pyramids – Youngest and Oldest Counties 2030



Sources: US Census Bureau Population Estimates Program; SC Revenue and Fiscal Affairs Office, Population Projections

# Population is Concentrated

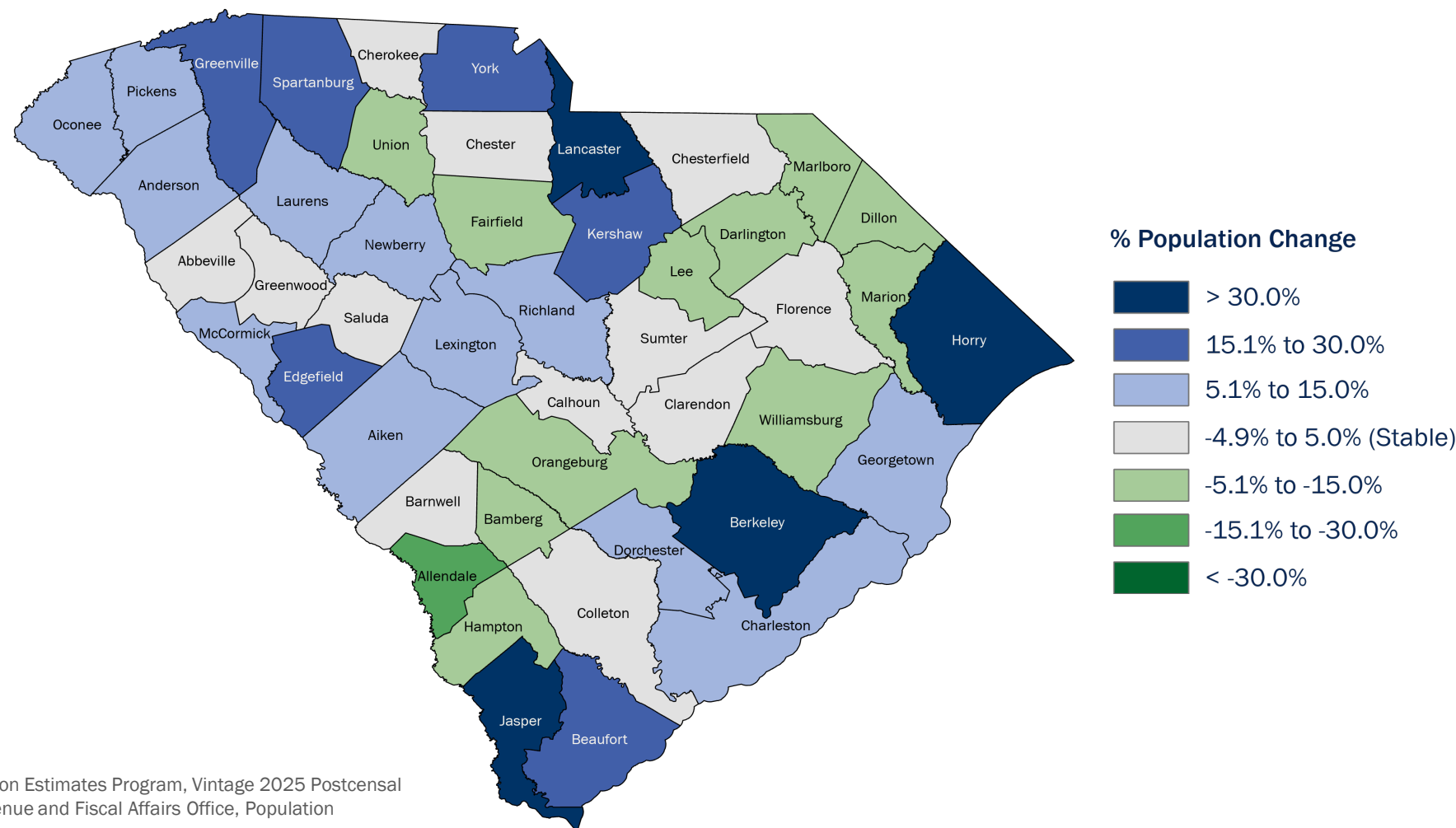
Six areas with a 25-mile radius represent about 37% of the state's land area (11,884 sq miles) but about 67% of the total SC population



Source: US Census Bureau, 2020 Decennial Census

# Projected Total Population Change by SC County, 2020 - 2030

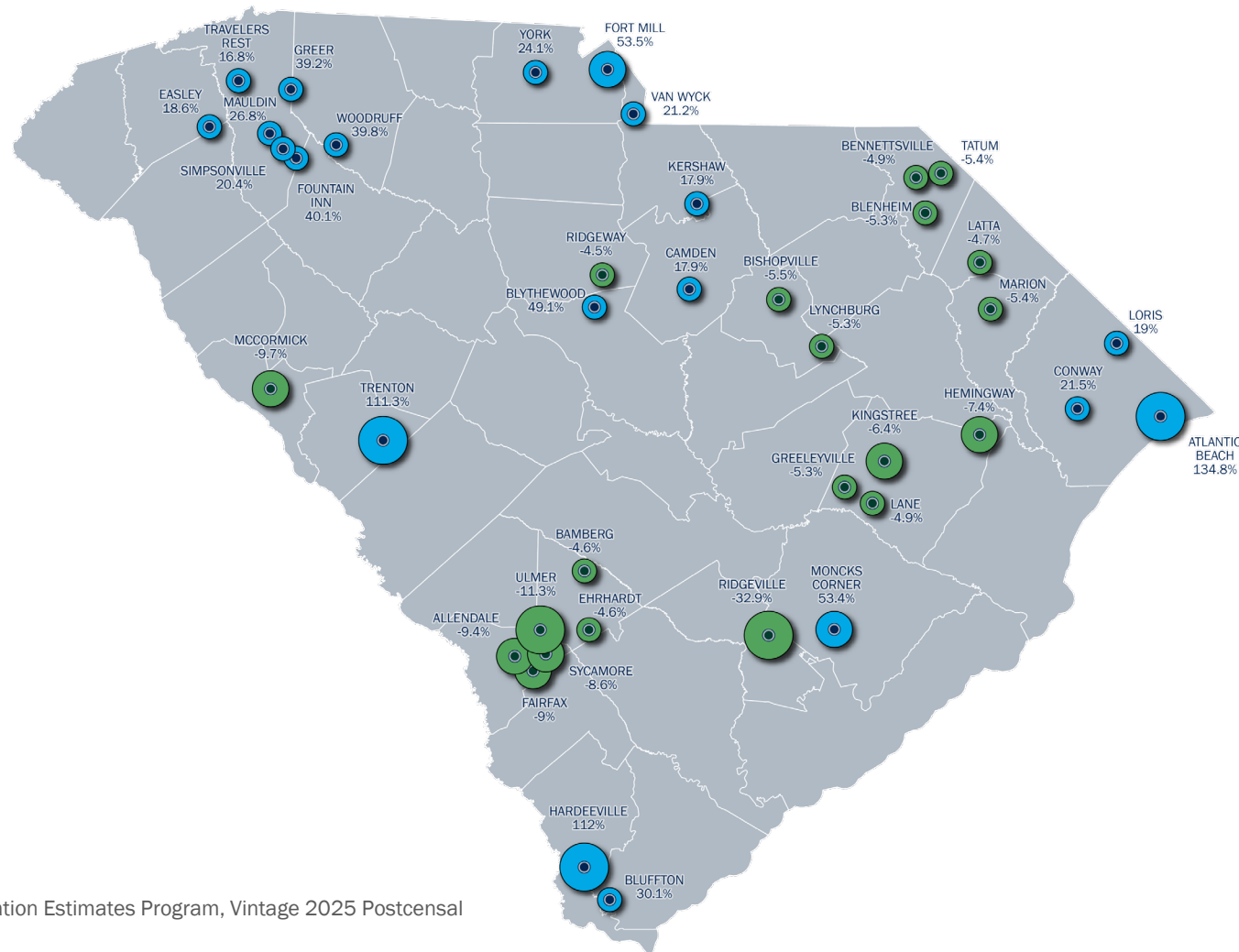
Significant differences in population growth by county are expected; 22 counties are expected to increase, while 12 are expected to decline



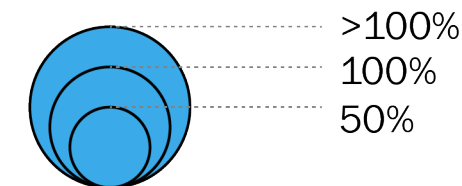
Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025; SC Revenue and Fiscal Affairs Office, Population Projections

# Population Change by Municipality

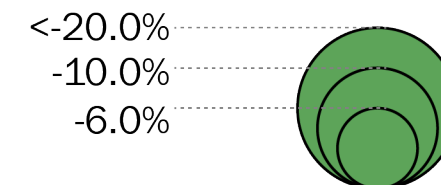
## Largest increases and decreases between 2020 and 2026



5-year change



5-year change

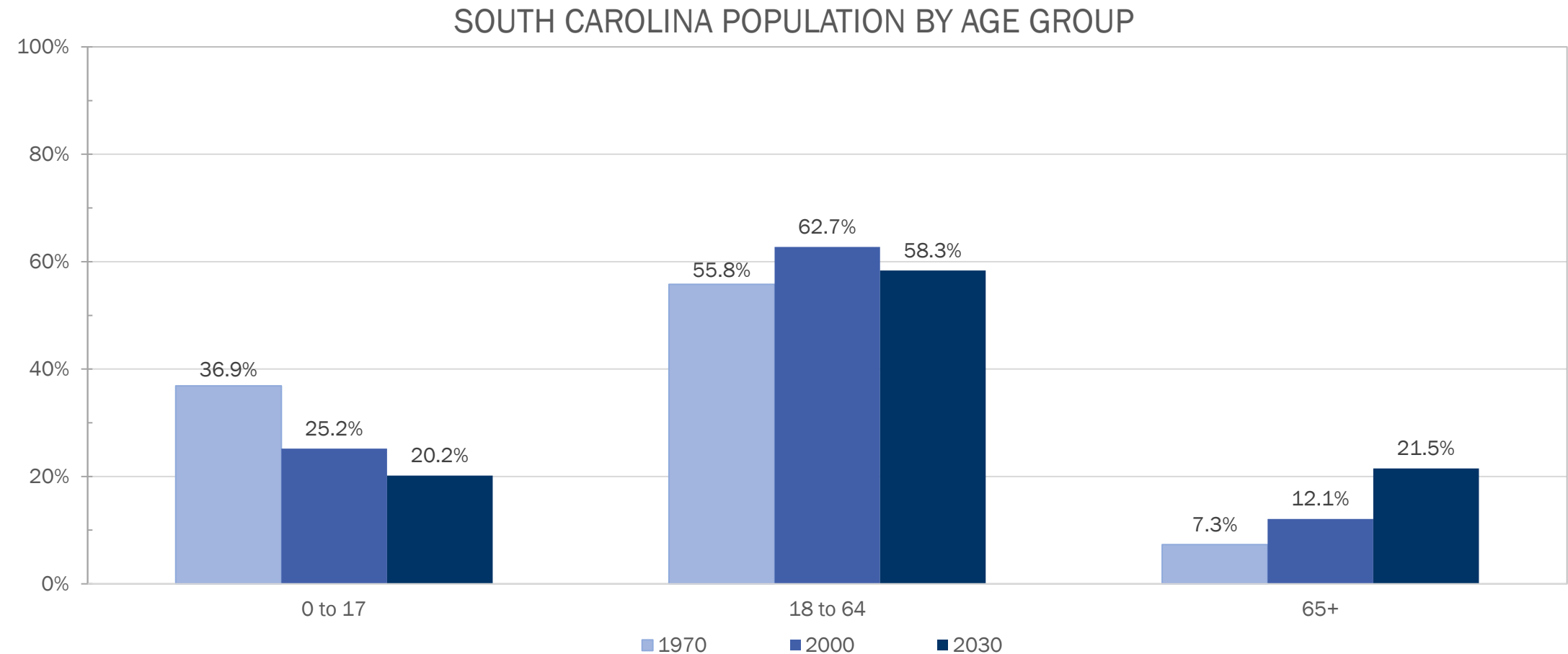


Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025  
Note: May include affects of annexation

# Examples of Challenges

# Changing Mix of Age Groups – Different Service Demands

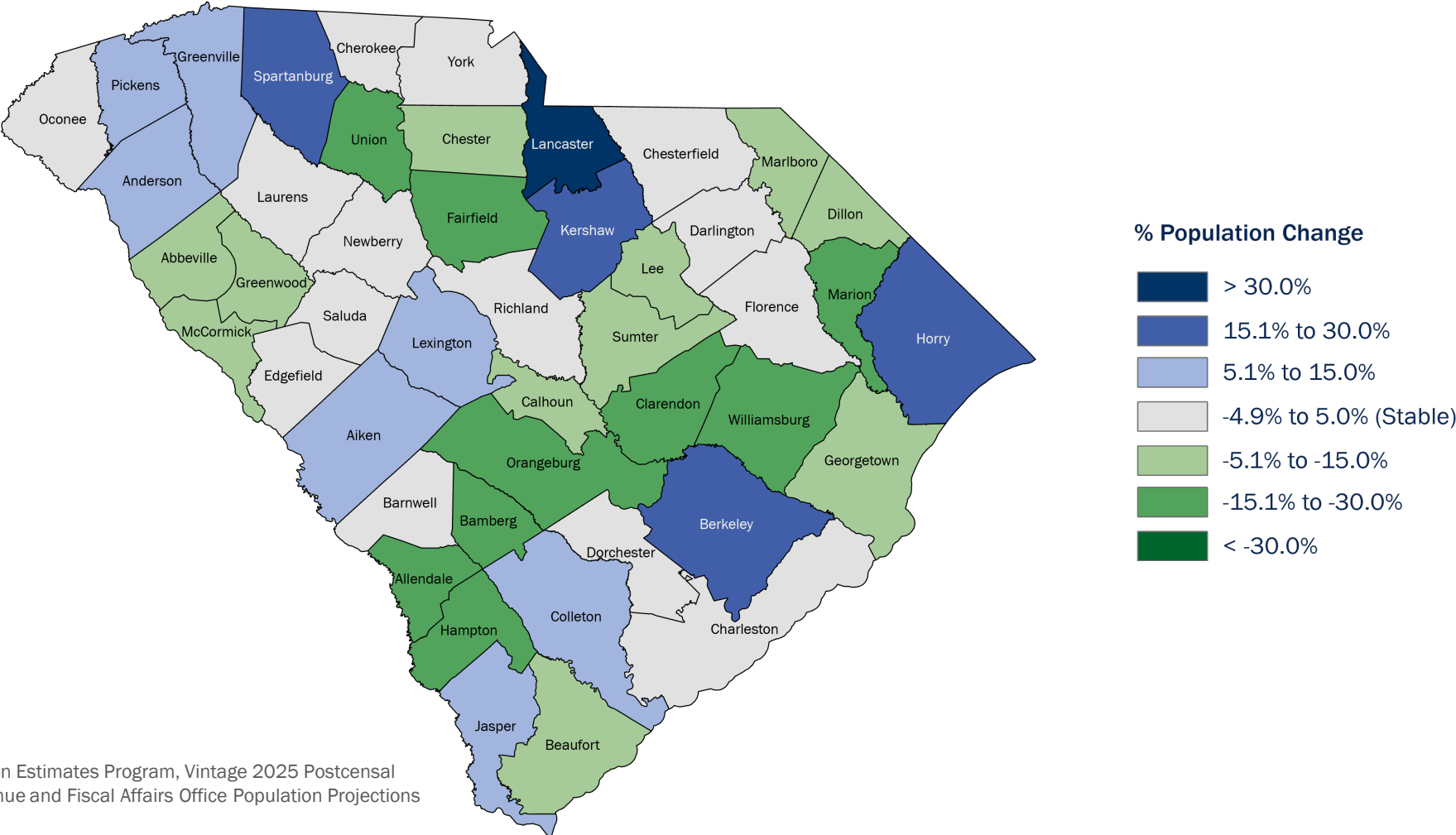
By 2030, projections are that there will be more people over 64 than under 18; the percentage of people of workforce age is projected to decrease



Source: US Census Bureau, Population Estimates; SC Revenue and Fiscal Affairs, Population Projections 383-RFA/lpw/9/1/2026

# Age 0-17 Projected Population Change by SC County, 2020 – 2030

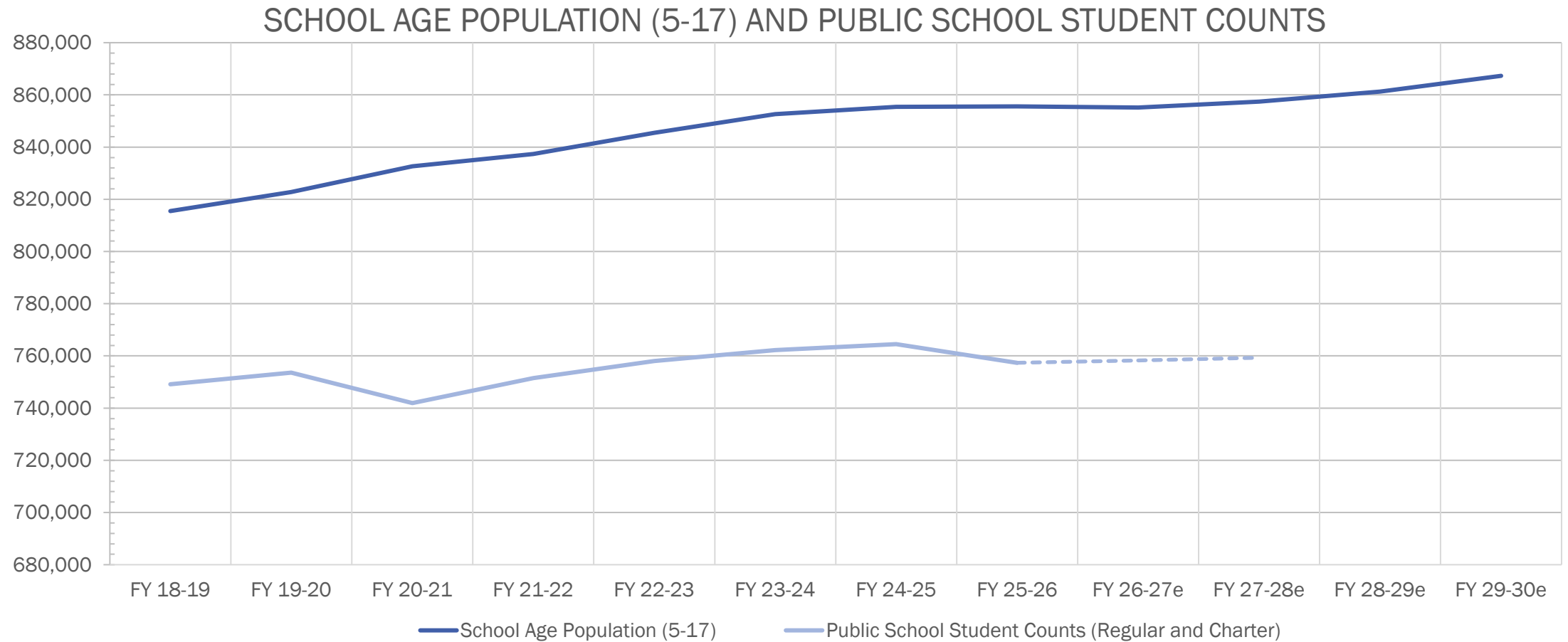
Population growth in children will vary widely by county with many counties decreasing



Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025; SC Revenue and Fiscal Affairs Office Population Projections

# School-Age Population and Public School Student Counts

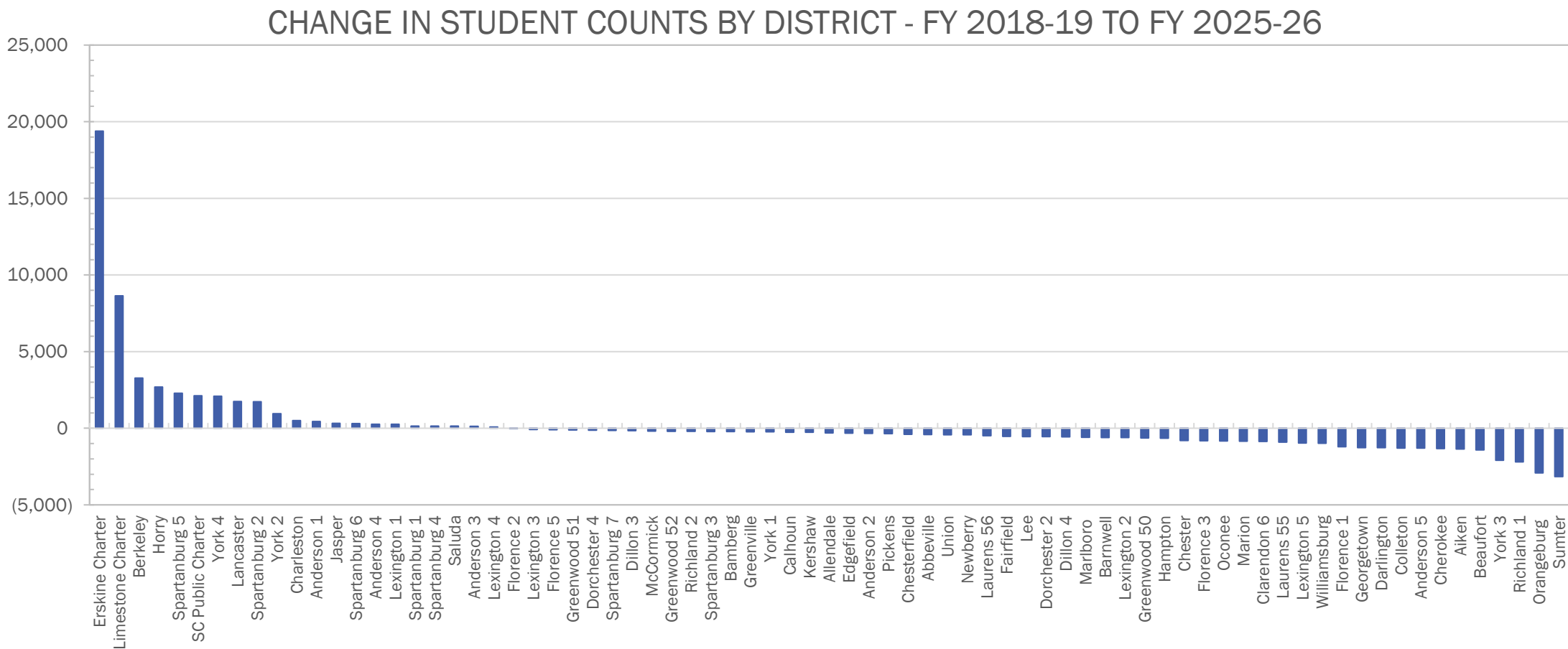
## Regular districts and charter districts - FY 19 to FY 26



Source: SC Department of Education, 135-day student counts for FY 18-19 to FY 25-26; SC Revenue and Fiscal Affairs Office, Population Projections, student count estimates for FY 26-27 and FY 27-28 RFA/lpw/10/1/26

# Change in Public School Student Counts by District

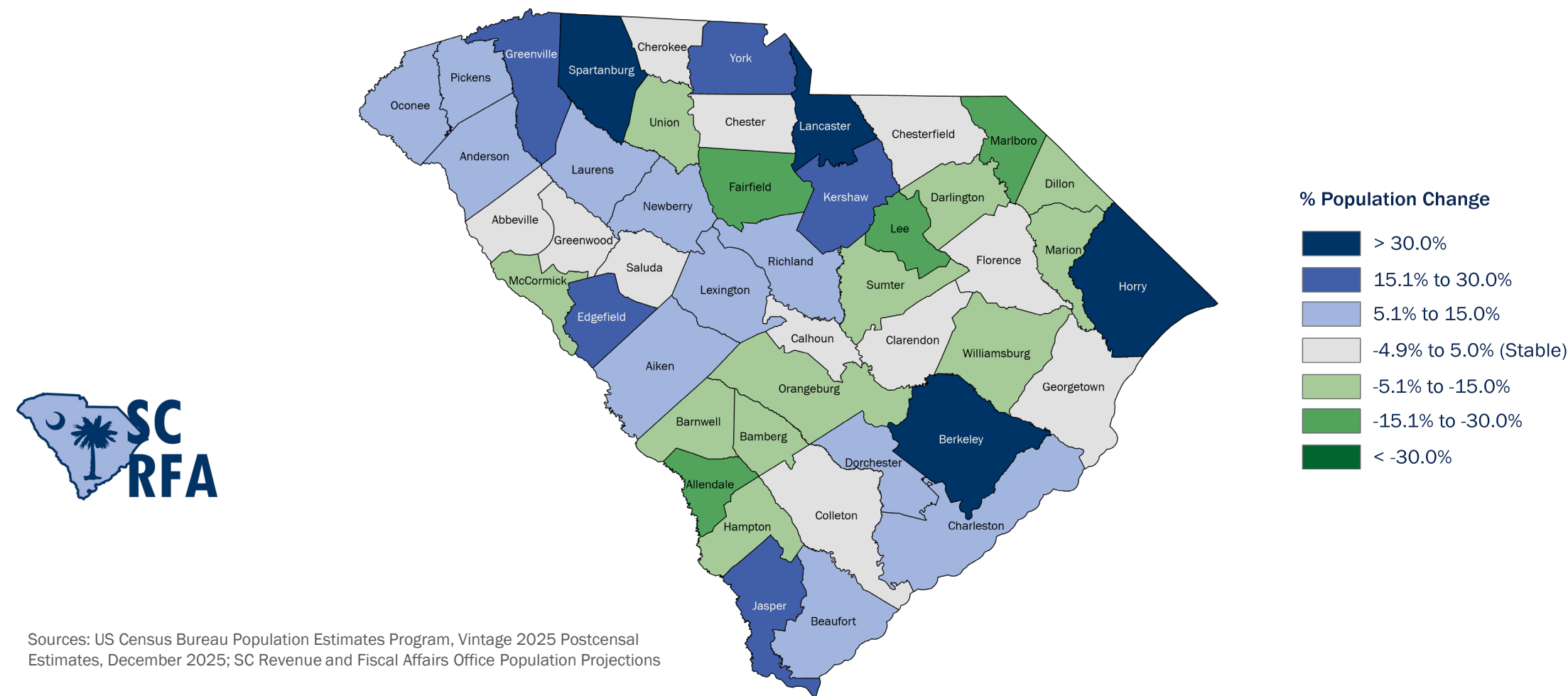
21 districts experienced growth, while 54 districts experienced a decline (change in student count ranges from +19,384 to -3,158)



Notes: Erskine Charter began operations in FY 19; Limestone Charter began in FY 23. Source: SC Department of Education, 135-day student counts. RFA/lpw/10/2/26

# Projected 18-64 Population Change by SC County, 2020 – 2030

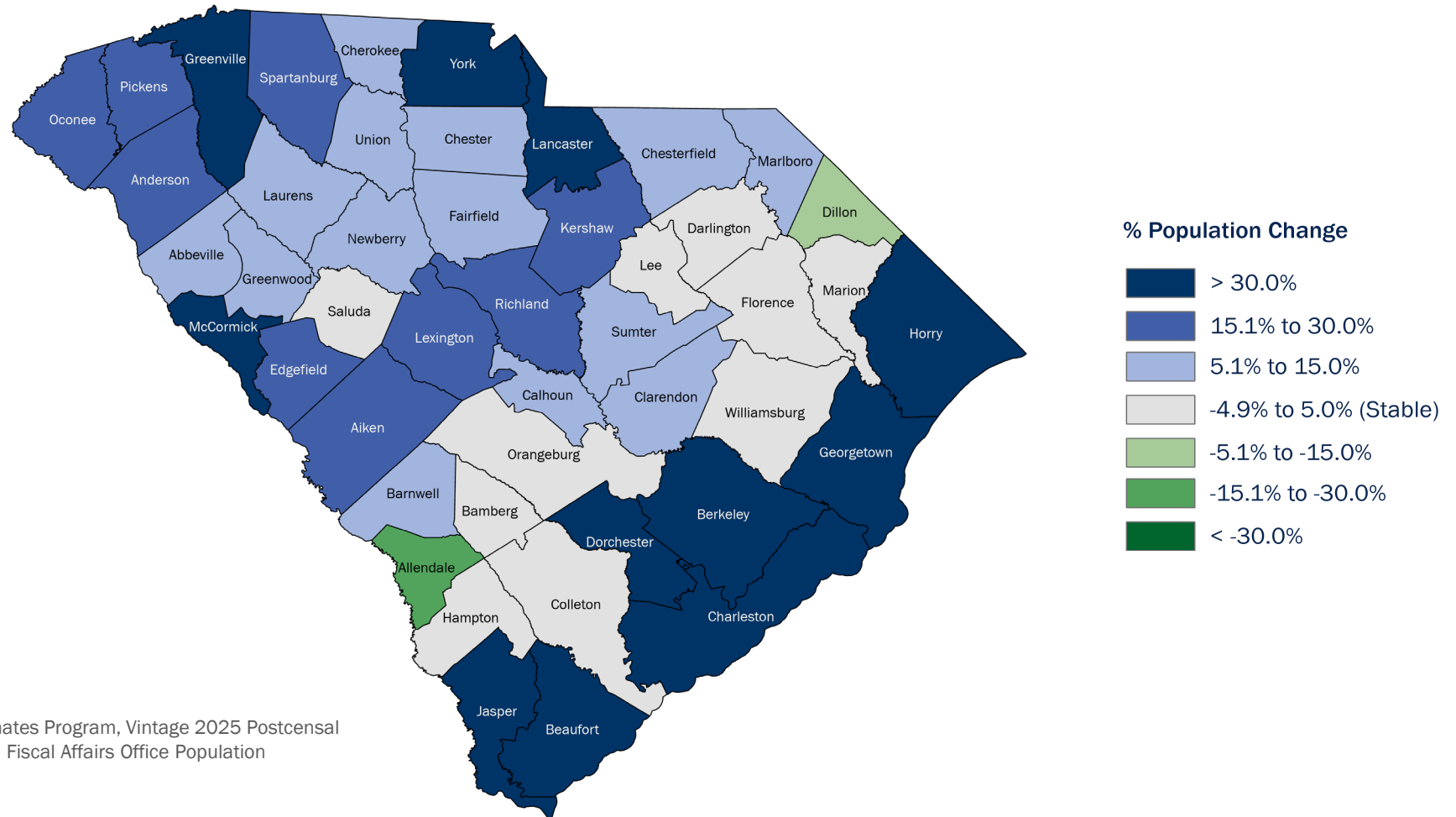
Growth in the workforce age population varies with 20 counties expected to increase, while 15 are expected to decline



Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025; SC Revenue and Fiscal Affairs Office Population Projections

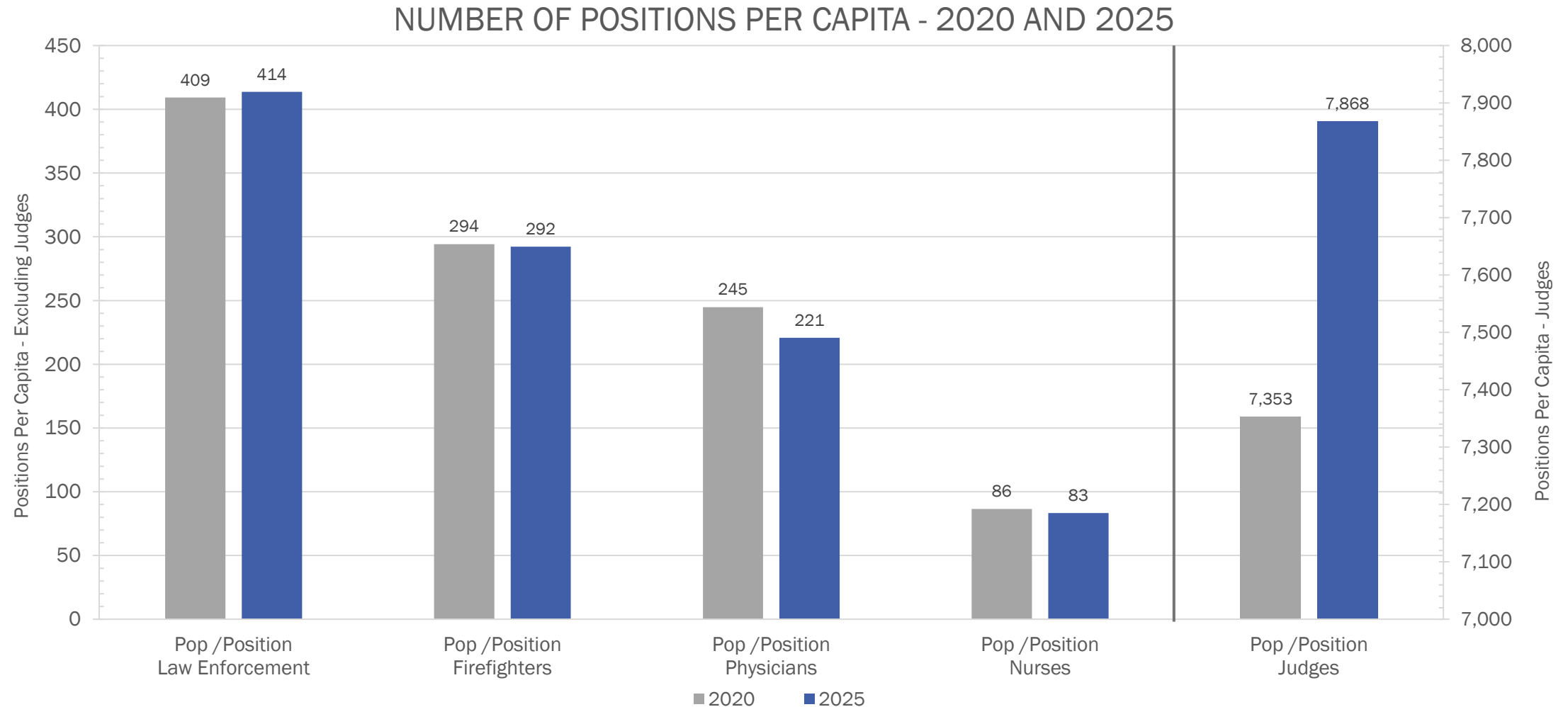
# Age 65+ Projected Population Change by SC County, 2020 – 2030

Some counties are projected to see significant growth in the 65+ population;  
34 counties are expected to increase, while 2 are expected to decline



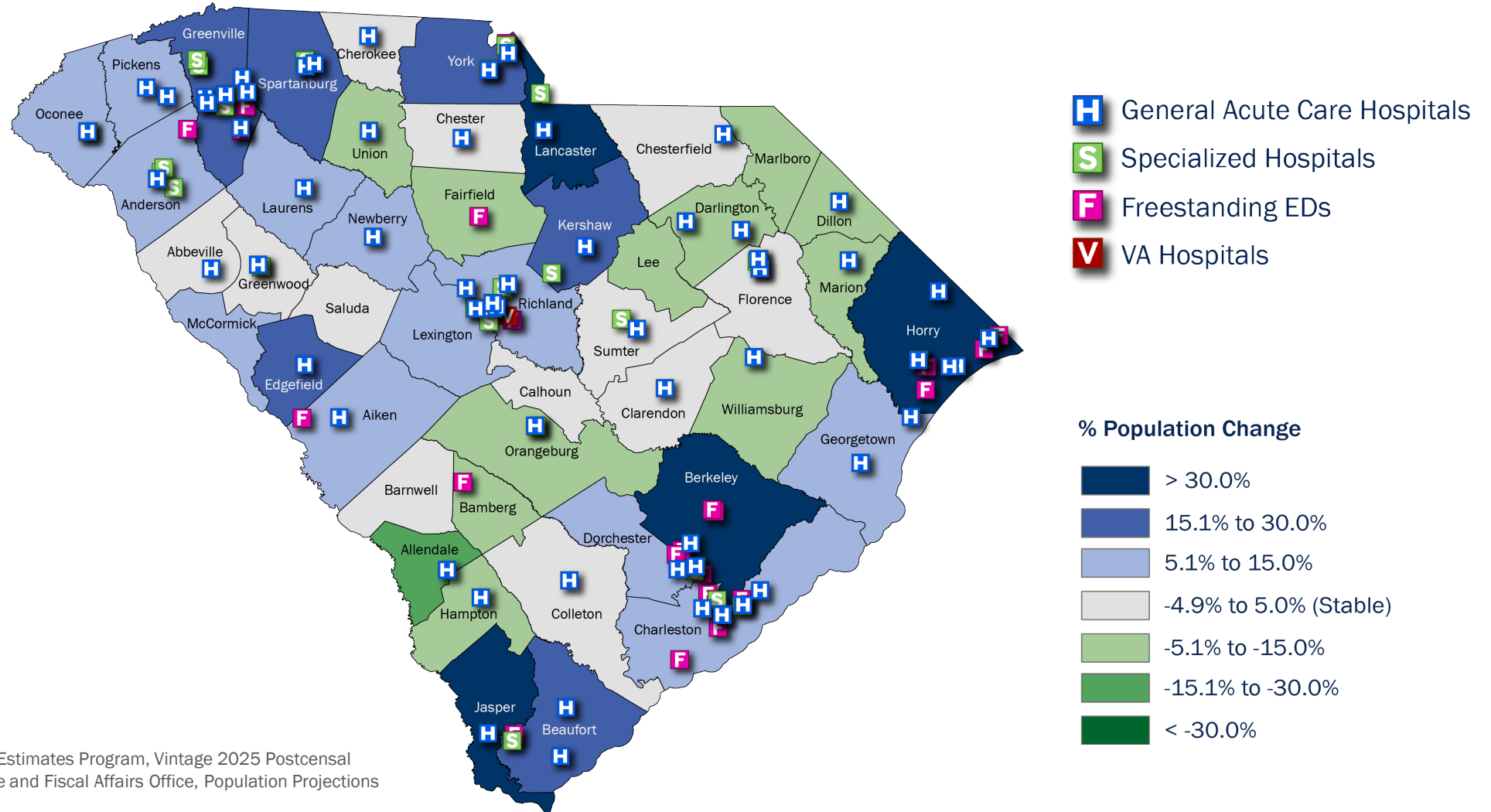
Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025; SC Revenue and Fiscal Affairs Office Population Projections

# Examples of Service to Population Ratios over Time



# Hospital Facilities by Change in County Population

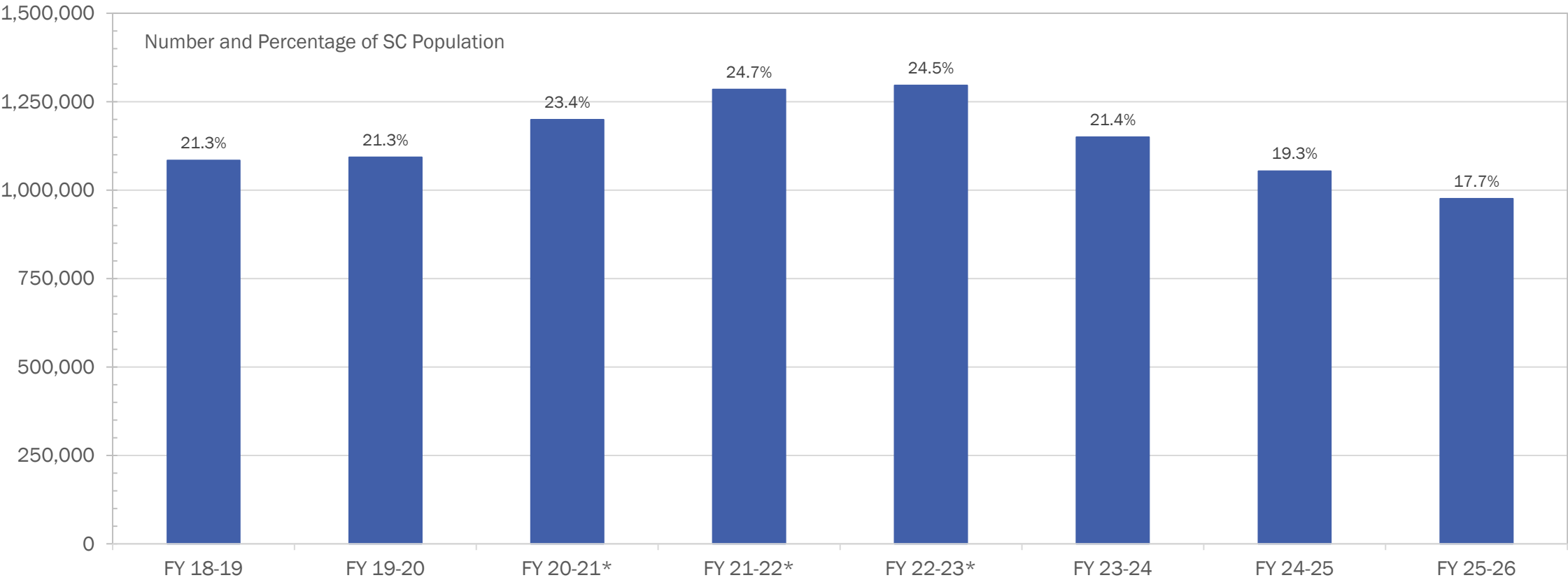
## 11 facilities are located in counties expected to lose population by 2030



Sources: US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025; SC Revenue and Fiscal Affairs Office, Population Projections RFA/10/2/2026

# Medicaid Population and Percentage of SC Population

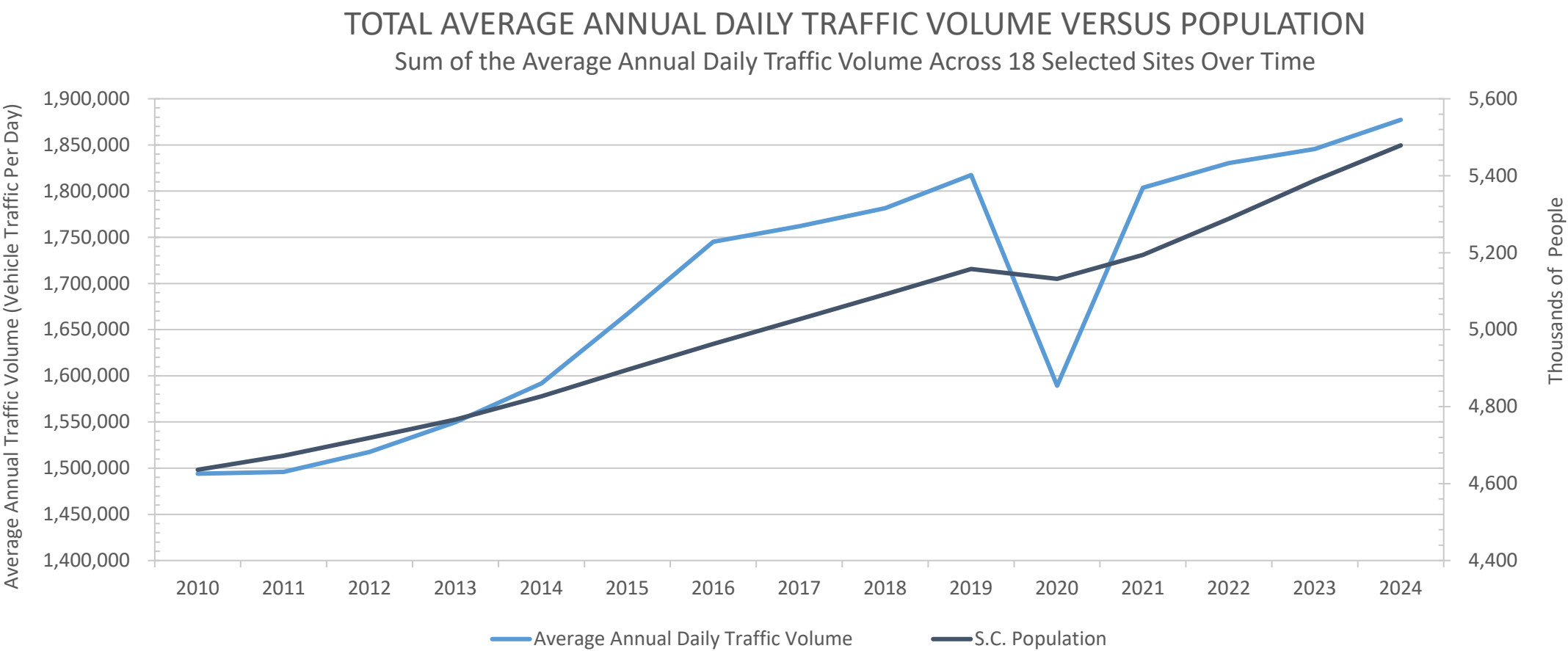
SC MEDICAID POPULATION – FULL BENEFIT MEMBERSHIP



\*SCDHHS paused annual eligibility redeterminations during the COVID-19 public health emergency (PHE) as required by federal law and resumed the process upon passage of the Consolidated Appropriations Act, 2023.  
Sources: SC Department of Health and Human Services, Medicaid enrollment, US Census Bureau Population Estimates Program, Vintage 2025 Postcensal Estimates, December 2025 RFA/10/5/2026

# Infrastructure - Road Usage Versus Population Growth

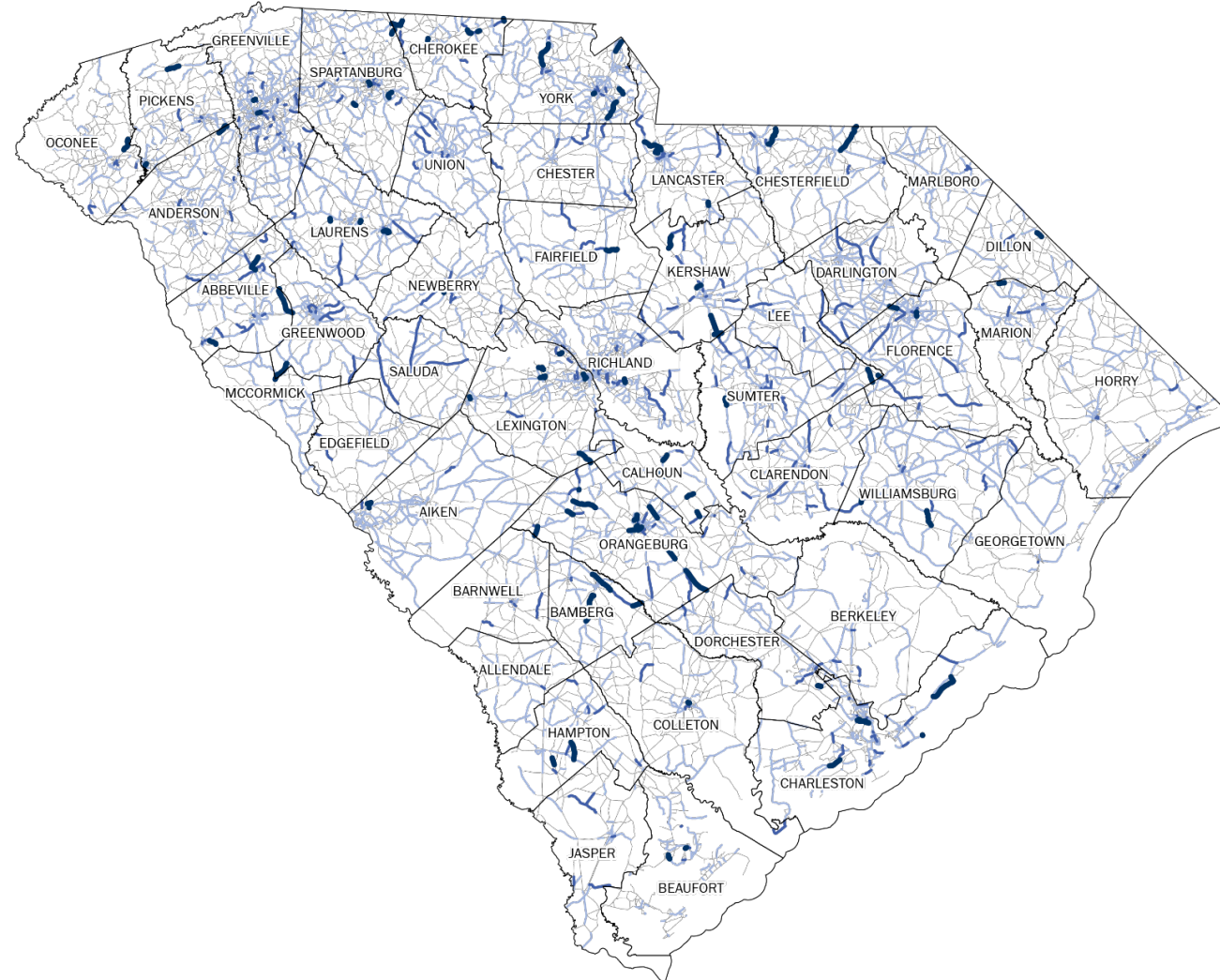
The average number of vehicles traveling per day has increased by 1.6% annually compared to population growth of 1.2%



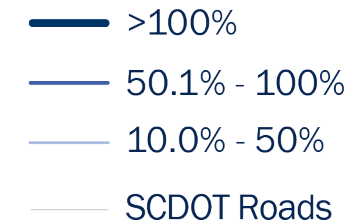
Source: South Carolina Department of Transportation Traffic Counts, U.S. Census Bureau, Resident Population in South Carolina [SCPOP] RFA - mad/09/04/2025

# Infrastructure - Change in Traffic Counts, 2019 to 2025

## Some roads have more than doubled in total daily traffic



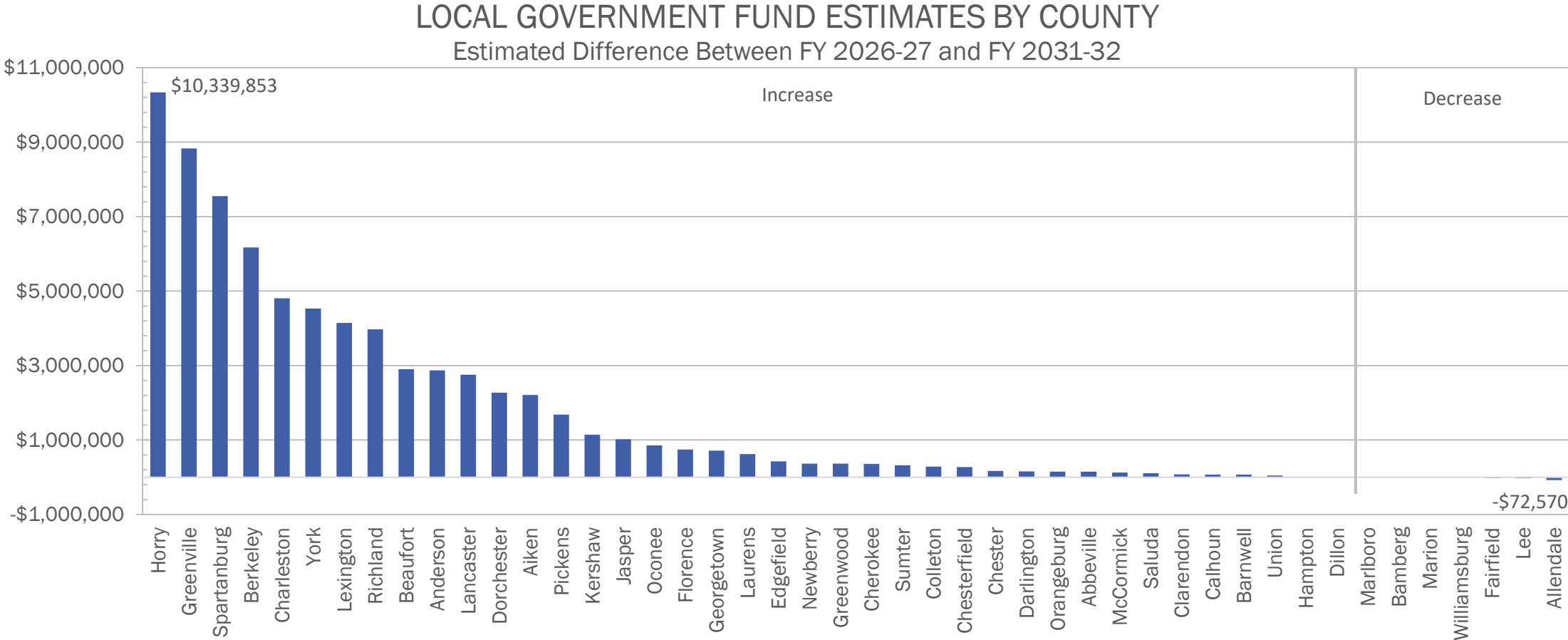
Average Annual Daily Traffic (AADT)  
% Change, 2019 to 2025



Source: SC Department of Transportation

# Projected Impact of 2030 Census on Local Government Fund

## Seven counties are estimated to receive fewer dollars than in FY 27



Notes: Local Government Fund estimate for FY 2031-32 is based on a maximum of 5 percent growth each year from the FY 2026-27 appropriated amount. FY 2026-27 appropriated amount for counties is \$264,922,274, and the estimate for FY 2031-32 for counties is \$338,440,780.  
Source: SC Revenue and Fiscal Affairs Office, Population Projections RFA/lpw/9/30/2026

# Summary – Population changes will further compound the challenge of allocating limited resources

- SC's demographic and economic position is evolving, not just simply growing
- This change and its challenges over the next few decades will be different than that of the past few decades
- Population statistics will not tell the whole story as growth in visitors and businesses adds complexity to the analysis
- Uneven and disparate change among the counties will add more complexity and challenges
- While the focus may be on measuring future change, attention to the base or current activities may also be needed
- Best solutions may require
  - Setting an overall guiding principle or policy that affects all service providers
  - Increasing cooperation and coordination among affected parties
  - Setting priorities
  - A new business service model

## Additional Information and Resources

- SC Population and Other Data Resources
  - <https://rfa.sc.gov/programs/census-state-liaison-and-data-center>

**Questions?**

**Thank You!**

