

1 Demographic Trends and Projections

1.1 Population

The ACOG region is a vibrant and growing area, and it is important to understand how the population is changing in order to better plan for future transportation needs. The six-county region has a population of 1,220,688. The primary population centers are in Greenville and Spartanburg Counties with populations of 482,752 and 293,542 respectively. Their combined populations make up nearly 64 percent of all people living in the region, and they are also the most urbanized counties. The remaining counties tend to be more rural, with the exception of Anderson.

The region has experienced a significant growth trend over the last 20 years. Between 2000 and 2010 the region increased by 142,841 people (13.9 percent) with a 2014 estimated population of 1,220,688. There is a clear hierarchy of growth in the Upstate. Greenville, Spartanburg and Anderson Counties lead the way, adding 71,609 people (18.9 percent), 30,516 people (12 percent), and 21,386 people (12.9 percent) respectively. The second tier of growth consists of Pickens, Oconee, and Cherokee Counties. These counties saw an increase of 8,467 people (7.6 percent), 8,058 people (12.2 percent) and 2,805 people (5.3 percent) respectively. It is significant to note that the growth rates in the smaller counties that make up the majority of the rural COG planning area have strong growth rates that match or exceed those of larger counties. The strong growth being seen in the smaller counties indicates that pressures on the transportation system in the ACOG planning area is increasing. This makes the rural planning effort very important to keep pace with future growth.

Table 1. Population by County, 1999-2014

	1990	2000	2010	2014	Change (00 - 10)	% Change (00 - 10)
Anderson	145,177	165,740	187,126	192,810	21,386	12.9%
Cherokee	44,506	52,537	55,342	56,024	2,805	5.3%
Greenville	320,127	379,616	451,225	482,752	71,609	18.9%
Oconee	57,494	66,215	74,273	75,192	8,058	12.2%
Pickens	93,896	110,757	119,224	120,368	8,467	7.6%
Spartanburg	226,793	253,791	284,307	293,542	30,516	12.0%
ACOG Region	887,993	1,028,656	1,171,497	1,220,688	142,841	13.9%

Source: U.S. Bureau of the Census 2011-2014 Population Estimates

Although all parts of the ACOG region have seen significant growth since 2010, **Map 2** displays some of the higher growth areas by census tract over the last 15 years. It is evident from this map that the areas of highest percentage growth are:

- **Western Cherokee County in the Grassy Pond/Macedonia area.** This is largely defined as the area between the City of Gaffney and the Cowpens area, just across the Spartanburg County line between US Highway 29 and SC Scenic Highway 11. Growth in this area is largely tied to development along I-85, which is a major impetus for growth in the Upstate as well as some “spillover” growth from eastern Spartanburg.
- **Northern Pickens County in the mountains.** This region is sparsely populated. The actual number of people moving to this area is relatively low, but in terms of a percentage increase, it is significant. Retirees that desire a scenic mountain home comprise a significant portion of the people that are moving to this area.
- **Western Anderson and southern Oconee Counties.** This area is defined as the area near the Townville and Fair Play area adjacent to Lake Hartwell. This area is also seeing growth tied to increased demand for lakefront housing that is convenient to I-85.
- **Eastern Anderson County.** Much of this growth is associated with growth in Powdersville and Greenville.
- **Northern Spartanburg County.** The area around Inman and US Highway 176 are quickly becoming targets for developments in suburban Spartanburg.

1.2 Households

As the Upstate grows in population, the number of households also increases. Household size across the nation has been on the decline, and that trend is true in South Carolina and the ACOG region too. The number of households can be indicative of the amount of traffic more so than the actual population. All households generate traffic of some kind, even though everyone in that household may not drive.

The number of households in the ACOG region increased between 2000 and 2010 by approximately 55,000. Following the real population trends, Greenville Spartanburg and Anderson added the most households. Greenville County has seen the largest increase in households, adding 26,975 during this period. Spartanburg County added 11,511 households and Anderson County added 8,180 households.

Table 2. Households by County, 1990-2010

	1990	2000	2010	Change (00 - 10)	% Change (00 - 10)
Anderson	55,481	65,649	73,829	8,180	12.5%
Cherokee	16,456	20,495	21,519	1,024	5.0%
Greenville	122,878	149,556	176,531	26,975	18.0%
Oconee	22,358	27,283	30,676	3,393	12.4%
Pickens	33,422	41,306	45,228	3,922	9.5%
Spartanburg	84,503	97,735	109,246	11,511	11.8%
ACOG Region	335,098	402,024	457,029	55,005	13.7%

Source: U.S. Bureau of the Census 2010

1.3 Housing

As the population in the Upstate grows, so does the need for new housing. It is important to recognize the role of housing in transportation planning. As the number of housing units grows, the amount of traffic generated from new developments increases too. This, in turn, affects the travel and commute patterns of the region. An example of the impacts from housing can be seen in numerous areas. In Greenville County, along the Woodruff Road corridor, residential and commercial development along the southern parts of the corridor near Simpsonville has drastically increased traffic along the corridor heading into Greenville. In Spartanburg County, residential development in and around Boiling Springs has created additional traffic that has caused significant problems along US 176 and other roads. As more development occurs in rural areas it will cause similar issues throughout the planning area. Additional investment will be needed to continue to meet the increasing needs.

Trends in the local housing market are relatively stable. The largest three counties, Greenville, Spartanburg, and Anderson, have maintained consistent new home starts over the five year period. The smaller three counties, while stable, have more fluctuation in new home start trends as they are affected more by market changes.

Greenville County has seen the largest housing increase, with over 9,000 new permits over the 5-year period, and that trend is expected to continue. Its location at the center of the Upstate, rapidly expanding employment base, and its proximity to I-85 and I-385 has been a major impetus for its suburban housing market. Areas of southeastern Greenville County such as Five Forks, Mauldin, and Simpsonville have seen some of the fastest growth.

Spartanburg County is the second largest and second most populated county in the Upstate. Its location at the intersection of I-85 and I-26 has helped to position it and its housing marker for growth. Spartanburg County has seen over 4,500 new housing units since 2010 and that trend is expected to continue. Spartanburg has seen a noticeable increase in the number of new residential permits issued each year with over 1,300 additional units in 2015 (compared to 501 in 2011). Spartanburg County has three distinct areas of growth: Boiling Springs to the north of the city, Roebuck to the southwest of the city, and the Greer-Duncan-Lyman area in the western part of the county. It should be noted that this analysis is based on numbers for the unincorporated county. Municipal data was unavailable.

Anderson County has seen over 2,600 new residential permits since 2010 and this trend is expected to continue. Anderson has seen consistent growth in permits every year during the 2011-2015 time period; averaging an increase of 31 percent annually (the highest annual rate in the Upstate). Anderson County benefits from its location on I-85, Lake Hartwell, and suburban growth from neighboring counties. Its fastest growing areas are in the northwestern part of the county in the vicinity of Lake Hartwell. Lakefront development for vacation and/or retiree homes is becoming more common in this area. The area northeast of the city between I-85 and US-29 towards Greenville is another area that has seen growth and is identified for future growth. The Powdersville area in the northeastern part of the county is seeing rapid suburbanization due to its proximity and ease of access to Greenville.

Oconee and Pickens Counties show similar trends in the number of new residential permits issued each year, although Pickens County is increasing at a higher rate than Oconee. Since 2012, residential permits in Pickens County have grown on average 29 percent per year, compared to 15 percent per year in Oconee County. Development tends to be around Lakes Hartwell and Keowee in both counties. Pickens also has growth areas around Clemson, and the southeastern portion of the county in and around Easley which is seeing “spillover” growth tied to Greenville County.

Figure 1. Annual Residential Building Permits by County, 2011-2015

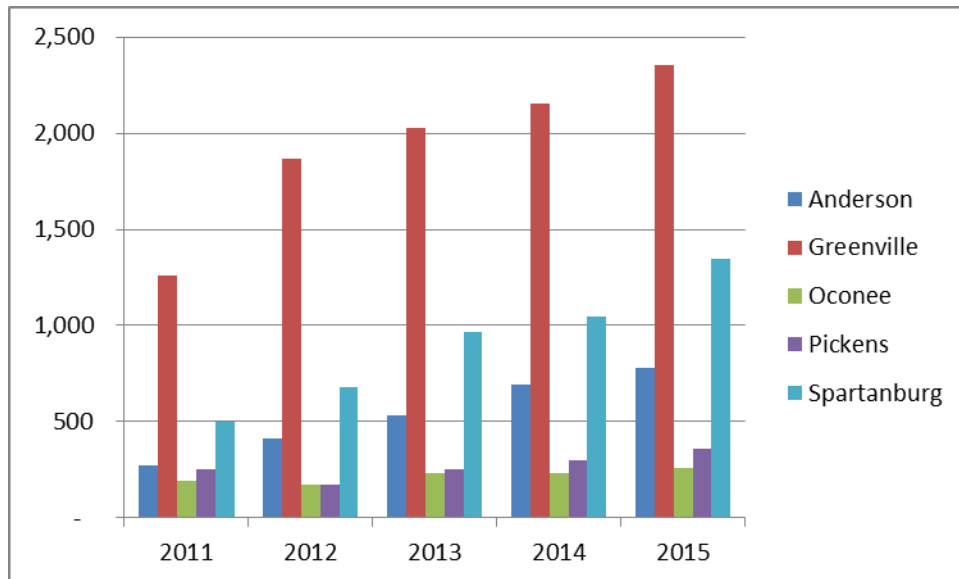


Table 3. Annual Residential Building Permits by County, 2011-2015

	2011	2012	2013	2014	2015	Total 2011-2015
Anderson	271	414	531	692	780	2,688
Cherokee*						
Greenville	1,262	1,869	2,025	2,152	2,355	9,663
Oconee	195	173	229	235	256	1,088
Pickens	249	172	253	300	361	1,335
Spartanburg	501	680	966	1,049	1,346	4,542
Total	2,478	3,308	4,004	4,428	5,098	19,316

*County-wide data unavailable

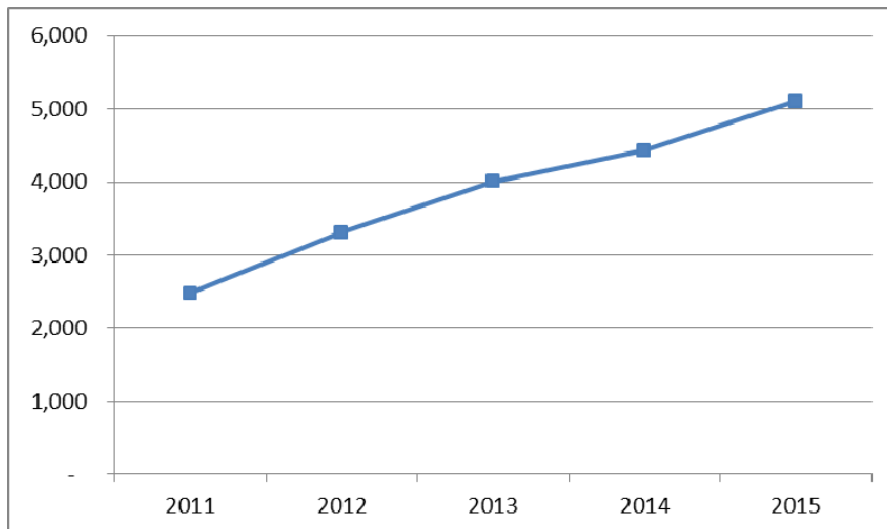
Source: The Market Edge, www.themarketedge.com

Compiled by *InfoMentum - A Decision Support System for Upstate South Carolina*

Residential building permit data for Cherokee County was unavailable. It is presumable that trends are steady based on other patterns in the region. A detailed trends and analysis based on this data area not plausible due to the lack of information.

The ACOG region has seen a steady increase in new housing unit permits during the 2011-2015 period. In 2011 there were approximately 2,500 new residential permits issued, and in 2015 there were about 5,100 permits issued. This is a difference of nearly 2,600 permits, and it reflects a steady increase of 20 percent per year. This trend is expected to continue for the region.

Figure 2. Total Residential Permits for the ACOG Region: 2011-2015



1.4 Population Projections

The ACOG region is expected to be the most populous region in South Carolina for the foreseeable future. The new population will tend to be concentrated in the urban MPO areas; however the rural areas of the COG will increasingly feel the effects of the expanding influence of development and growth in the region.

Population growth is expected in all counties in the COG. Greenville County will continue to be the primary population center in the Upstate. It will also have the most growth in terms of real population, exceeding 540,000 by 2030. This increase reflects a change of approximately 91,000 or 20 percent over the next 20 years. Most of the growth in Greenville will occur within the urban MPO jurisdiction. ACOG's in-house population projections for Greenville County depict more growth; exceeding 630,000 by 2030 and nearly 750,000 by 2040. ACOG's projections are based on an exponential regression model of 2000 and 2010 Census data plus the latest Census population projections from 2011-2015.

Spartanburg County is the second largest population center in the Upstate, and it is expected to retain that status in the future. It has the second largest projected population increase of approximately 47,000 or 16 percent over the next 20 years. Much of the growth will occur within the MPO jurisdictions, however, there is some growth expected to the south of the MPO that could impact the non-MPO area.

Anderson County is expected to have an increase of approximately 31,000, representing a 17 percent increase. Anderson County will see much of its growth outside of the MPO areas, particularly in the northwestern portion of the county in vicinity of Lake Hartwell, Pendleton, and around the Townville community. Another key growth area in the non-MPO region is located northeast of Anderson, between I-85 and US Highway 29 towards Powdersville.

Oconee and Pickens Counties are projected to see a consistent increase in population over the next 20 years; population projections for 2030 are approximately 89,000 (a 20 percent increase) and 133,000 (an 11 percent increase) respectively. The growth in both counties will be focused around Lakes Hartwell and Keowee, and will include the cities such as Clemson, Central, Seneca, and Walhalla. The growth of second homes and retirement communities around the lakes will be an important factor in planning for growth in this region.

Cherokee County is projected to have the lowest population of the COG counties in 2030, including an expected population near 57,000 (a 4 percent increase). The growth in Cherokee will likely occur along I-85 in the vicinity of Gaffney, the largest city and county seat, and to the southeast towards Cherokee Falls and the Broad River.

Table 4. SCORS Population Projections by County, 2010-2030

	2010	2015	2020	2025	2030
Anderson	187,126	193,300	199,500	209,000	218,500
Cherokee	55,342	56,100	56,800	57,000	57,300
Greenville	451,225	473,300	495,400	518,800	542,300
Oconee	74,273	76,600	78,900	84,000	89,100
Pickens	119,224	121,600	123,800	128,300	132,900
Spartanburg	284,307	295,100	305,800	318,500	331,200
ACOG Region	1,171,497	1,216,000	1,260,200	1,315,600	1,371,300
SC	4,625,364	4,823,200	5,020,800	5,235,500	5,451,700
USA	310,233,000	325,540,000	341,387,000	357,452,000	373,504,000

Source: U.S. Bureau of the Census, SC Department of Health and Environmental Control, SC Office of Research and Statistics
 US Projections by US Bureau of the Census, Annual Projections of the Total Resident Population (NP-T1)

Figure 3. SCORS Population Growth & Projections by County, 2010-2030

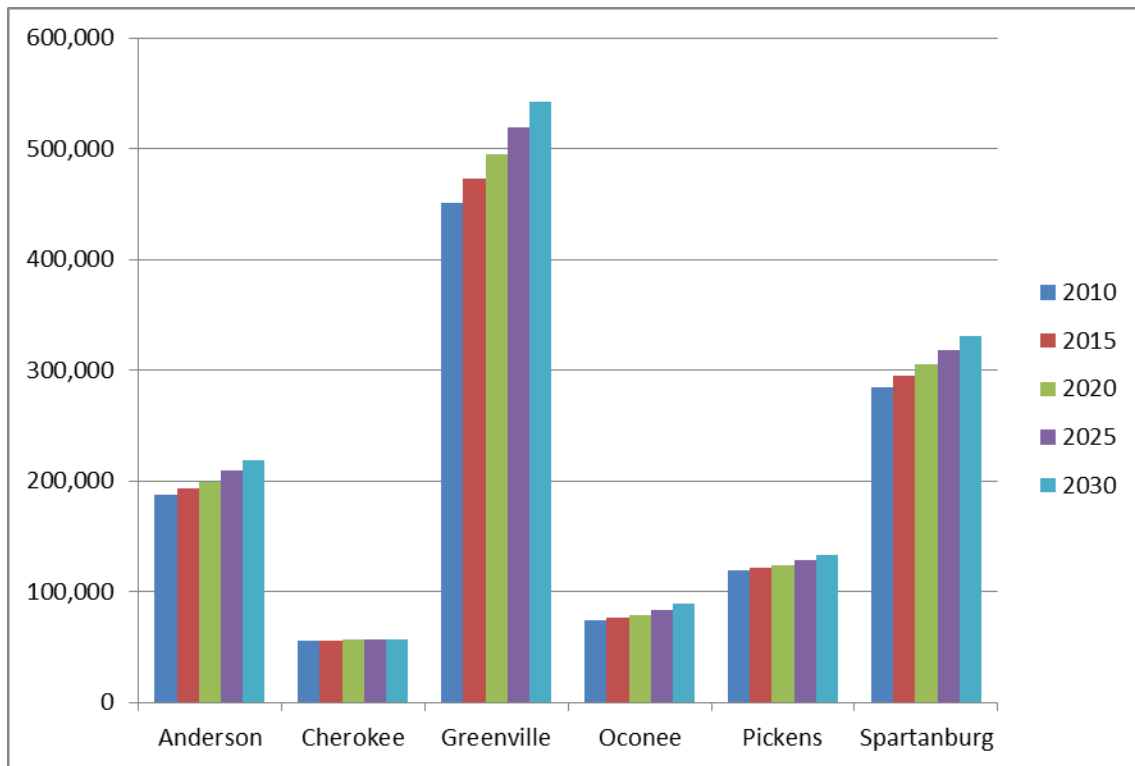


Table 5. ACOG Population Projections by County, 2015-2040

	Method*	2015	2020	2025	2030	2035	2040
Anderson	AAI	195,000	204,000	214,000	224,000	233,000	243,000
Cherokee	AAI	56,000	57,000	59,000	60,000	61,000	62,000
Greenville	ER	491,000	536,000	584,000	636,000	693,000	755,000
Oconee	AAR	76,000	79,000	83,000	87,000	91,000	95,000
Pickens	AAI	122,000	125,000	129,000	133,000	136,000	140,000
Spartanburg	AAI	297,000	312,000	326,000	341,000	355,000	370,000
ACOG Region**	LR	1,237,000	1,306,000	1,376,000	1,446,000	1,515,000	1,585,000

Source: ACOG Population Projections (rounded to nearest 1,000)

* AAI-Average Annual Increase; AAR-Average Annual Rate; ER-Exponential Regression ,LR-Linear Regression

**The ACOG Region was separately projected; therefore the total does not reflect a sum of each County's projected population

Figure 4. ACOG Population Growth & Projections by County, 2020-2040

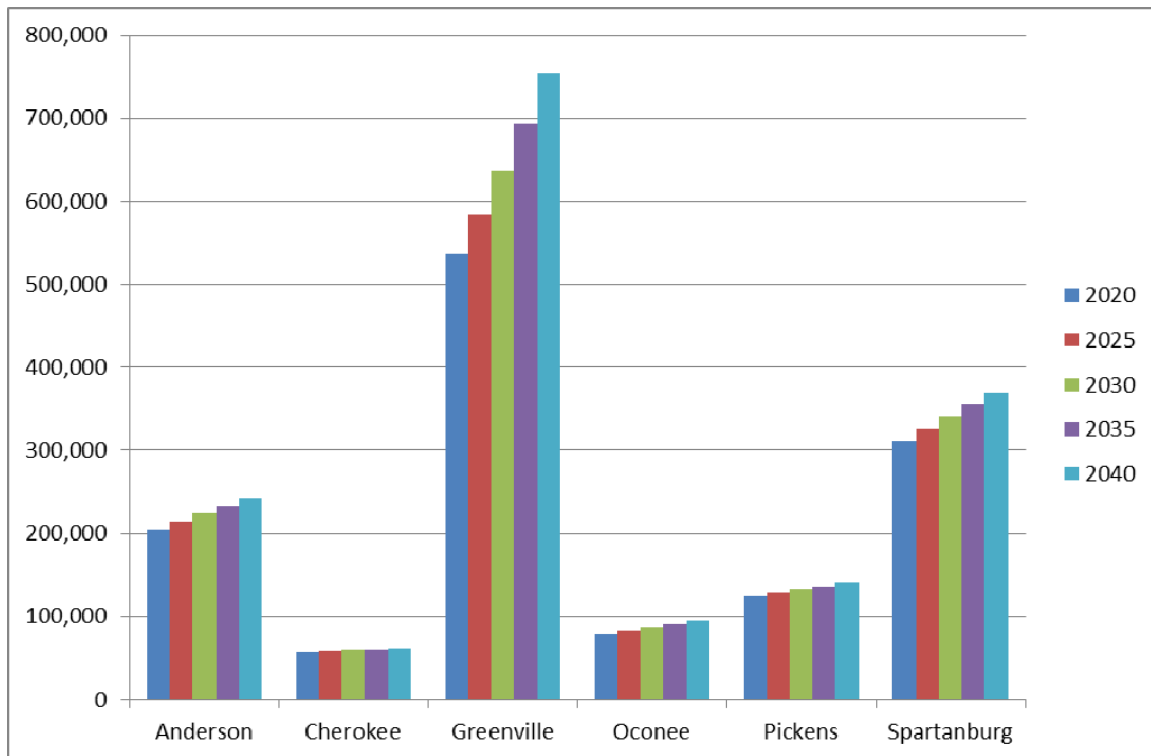


Table 6. Projected Population Change by County 2015 – 2030, SCORS and ACOG

	SCORS Projections		ACOG Projections	
	Population Change	% Change	Population Change	% Change
Anderson	25,200	13%	29,000	15%
Cherokee	1,200	2%	4,000	7%
Greenville	69,000	15%	145,000	30%
Oconee	12,500	16%	11,000	15%
Pickens	11,300	9%	11,000	9%
Spartanburg	36,100	12%	44,000	15%
ACOG Region	155,300	13%	209,000	17%
SC	628,500	13%	N/A	N/A
USA	47,964,000	15%	N/A	N/A

According to projections by the South Carolina Office of Research and Statistics (SCORS), the ACOG region as a whole is expected to gain more than 155,000 new residents by 2030. This increase reflects a projected change of 13 percent over the next 15 years. Projections by the ACOG show more robust growth, especially in Greenville, Spartanburg and Anderson Counties. ACOG projections estimate the region’s 2015-2030 growth at 209,000 residents, or 17 percent increase. A significant portion of this growth will occur in areas that fall under the Rural Planning Area. It will be necessary to identify areas within the rural study area that are expected to experience the greatest growth. This will help to identify potential needs and plan for the future infrastructure needs of the region through the Rural Long Range Transportation Plan (RLRTP).

1.5 Identified Needs

There is a substantial amount of growth forecasted for the ACOG region over the next 20 years. The Upstate’s location along the booming I-85 corridor between Charlotte and Atlanta makes the area attractive to new industry. Job growth brings residents and development which put additional strain on the transportation infrastructure in the region. Much of the forecasted growth is within the urban MPO jurisdiction. In the rural areas, however, availability of large tracts of land, a favorable market, and limits within already developed areas is expected to lead to considerable growth in housing in the rural areas. There are several key areas of projected growth as identified below:

- The **Seneca – Walhalla** area is the largest area of projected growth in the rural COG region. Lakes Hartwell and Jocassee are a major impetus for new growth. Lakefront property is popular among retirees and the convenient access to I-85 and the college town atmosphere provided by Clemson is a large draw to the area.
- **Northwestern Anderson County**, particularly the Townville community, is connected with the Clemson – Seneca area. Growth there is likely to be focused around Lake Hartwell.

- The **Gaffney** area is projected to see moderate growth. It is focused along I-85 and the areas between the City and the interstate. The southern portion of the county could see more investment if Duke Energy decides to resume construction of its nuclear power station in the Cherokee Falls community.
- **Spartanburg County** is expected to see some moderate growth in the rural COG area just south of the MPOs. It is on the periphery of the growth seen in the greater Spartanburg area that is largely within the more urban MPO.

The highest projected growth area in the rural COG region is in Anderson County, northeast of the City. The area between I-85 and US-29 towards Greenville is the focus of the new growth.