



# ENVISION 2047

A community vision for Summerville and Dorchester County, SC



April, 2026

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## ABOUT BROAD RIPPLE STRATEGIES

Founded in 2021, Broad Ripple Strategies (BRS) represents more than 35 years of experience crafting community, workforce, and economic development strategies that build consensus, drive investment, and get results. Our firm has two principals – Matt DeVeau (based in Chicago) and Alex Pearlstein (based in Birmingham, AL). Together we have helped more than 70 clients develop 100+ strategies for community and economic development, talent and workforce sustainability, and quality of place. We identify the catalytic projects and programs that lead to broad positive change. Rather than a one-size-fits-all process, we customize our approach to meet the needs and goals of each client. And we create strategies for action, not shelves. We help our clients determine not just what to do but how and with whom to ensure they make a broad impact in their community or organization.



Cover Photo and Photo at Right: Greater Summerville/Dorchester County Chamber of Commerce



# STEERING COMMITTEE

A Steering Committee consisting of top public, private, nonprofit, and education leaders from throughout the community is leading this planning process. The following individuals committed their time and expertise toward shaping the ENVISION 2047 community vision that will guide strategic actions in Summerville and Dorchester County for years to come.

**Stephen Chandler (chair)**, CEO, Summerville Medical Center  
**David Chinnis (chair)**, Chairman, Dorchester County Council  
**Russ Touchberry (chair)**, Mayor, Town of Summerville  
**Margaret Bailey**, Register of Deeds, Dorchester County  
**Carrie Bovender**, Owner, Grand Forest, Inc  
**Jason Brown**, VP of Investor Relations and External Affairs, CRDA  
**Deb Campeau**, Owner, Rewire, LLC  
**Debbie Clarke**, Senior VP and Commercial Banker, Pinnacle Financial  
**Larry Collett**, Co-Founder and CEO, Larry & Rebecca Collett Foundation  
**Marshall Connor**, VP of Economic Development, Trident Technical College  
**Chief John Creel**, Chief, Edisto Natchez-Kusso Tribe of South Carolina  
**Jonathan Dawley**, President & CEO, KION North America  
**Joe Debney**, CEO, Summerville Family YMCA  
**Katie DePoppe**, Executive Partner, Chick-fil-A Summerville & Goose Creek  
**Steve Doniger**, Executive Director, Summerville DREAM  
**Diane Frankenberger**, Owner, People, Places & Quilts  
**DJ Hampton**, President & CEO, Trident United Way  
**Phyllis Hughes**, Board Chair, Dorchester School District 4 Board of Trustees  
**Justin Lee**, Owner, Gilbert+Lee Construction, LLC  
**Dexcter Mack**, Admin II, Dorchester County Auditor's Office  
**Dickie Miler**, Owner, Miler Properties  
**Frank Neal**, Director of Community and Economic Development, Town of Summerville  
**Wendell Nolan**, Owner, The Summerville Sentinel  
**Robert Pratt**, Owner, RE/MAX Pratt & Company  
**Sandy Price**, Executive Director, Tri-County Regional Chamber  
**Amanda Redick**, Project Manager, HDR  
**Jana Riley**, Executive Director, Public Works Arts Center

**Scott Runyon**, Manager – Utilities Services Support, Dominion Energy  
**Dan Seiden**, Headmaster, Pinewood Preparatory School  
**Greg Shuler**, Vice President, The Bank of South Carolina  
**Jessi Shuler**, Director of Planning, Town of Summerville  
**Scott Slatton**, Town Administrator, Town of Summerville  
**Brig. Gen. (Ret.) Hank Taylor**, United States Air Force  
**John Truluck**, Director, Dorchester County Economic Development  
**Jason Ward**, County Administrator, Dorchester County  
**Ashley Wimberly**, Board Chair, Dorchester School District 2 Board of Trustees  
**Melissa Wright**, Guidance Counselor, Dorchester County Career & Tech. Center

## STRATEGIC ORGANIZERS

**Rita Berry**, President/CEO, Greater Summerville/Dorchester County Chamber of Commerce  
**Chris Kahler**, Board Chair, Greater Summerville/Dorchester County Chamber of Commerce  
**Michael Wood**, Board Chair, Greater Summerville/Dorchester County Chamber Foundation

# ENVISION 2047

Change is a fundamental law in any type of community, and uncertainty about “what’s next” can be a barrier to action and collaboration. The most successful places understand that they can have a say in the matter by adopting shared strategic visions that inspire action. Rosabeth Moss Kanter, the co-founder of Harvard’s Advanced Leadership Initiative, captures this sentiment succinctly: ***Change is disturbing when it is done to us, exhilarating when it is done by us.***

Leaders in Summerville and Dorchester County understand this reality. In early 2025, Greater Summerville Dorchester County Chamber Foundation, in partnership with the Town of Summerville, Dorchester County, and the Greater Summerville/ Dorchester County Chamber of Commerce initiated a strategic planning process to create a **dynamic new community vision.**

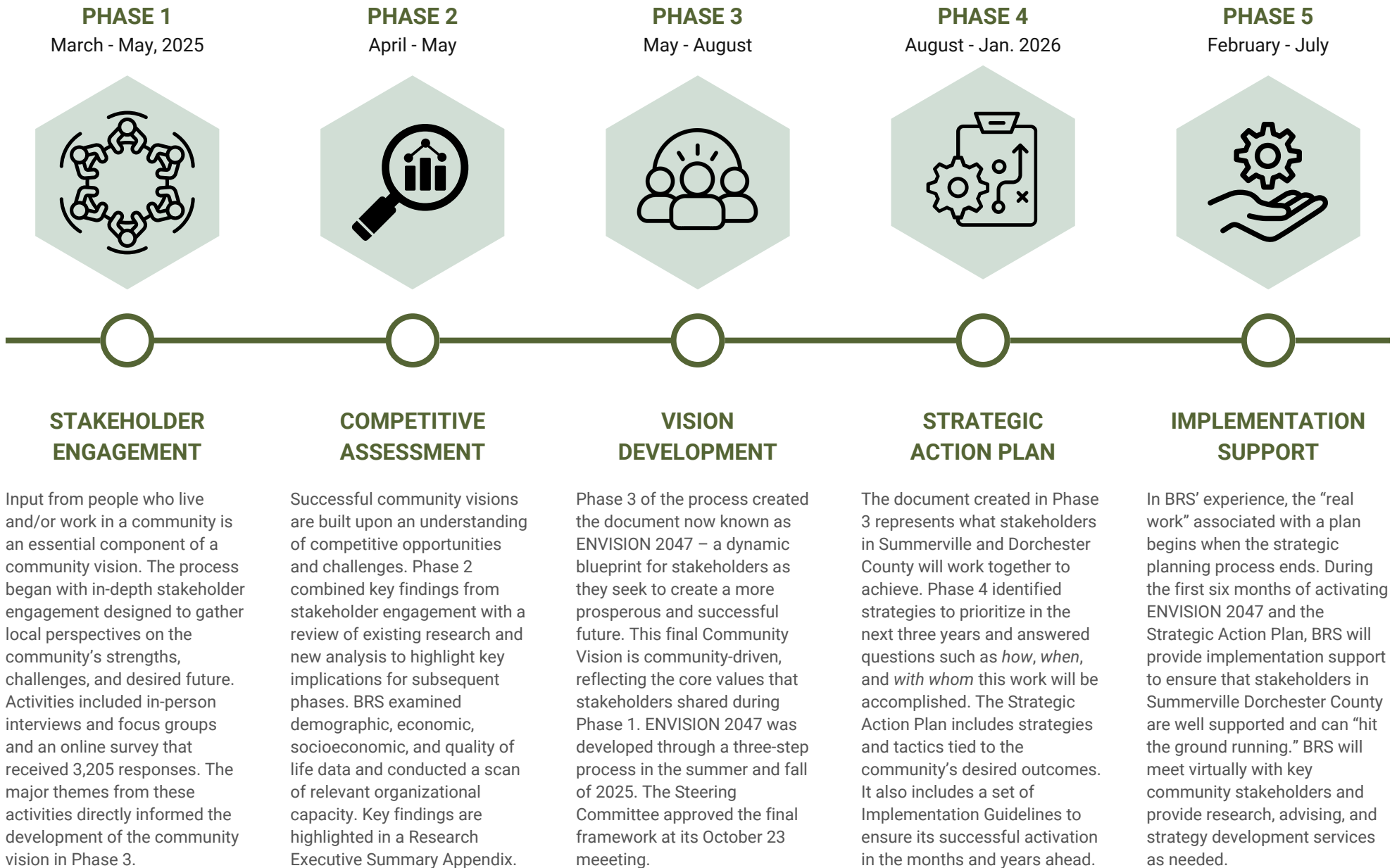
This planning process, detailed on the following page, was rooted in extensive research and a public input process that included in-person interviews, focus groups, and an **online survey that received 3,205 responses.** A dedicated **Steering Committee** of public, private, and nonprofit leaders utilized this information to create a community vision that **reflects stakeholders’ core values and outlines their desired future.**

The community vision was originally intended to have a 15-year outlook through 2041. But as community leaders gathered in early 2026 to formally name the community vision document, they recognized an important milestone slightly further out on the horizon. **In 2047, the Town of Summerville will celebrate its bicentennial in the same year that Dorchester County will mark its 150th year.** In recognition of this momentous occasion, leaders have named this plan **ENVISION 2047** and lengthened its timeline accordingly. The long-term values and goals articulated by residents and confirmed by the Steering Committee remain unchanged.

This shared vision will be activated in its initial stages by a **Strategic Action Plan**, completed in January 2026, that identifies priorities, needed resources, and desired outcomes for the next three years, spanning 2026 to 2028. Stakeholders committed to championing a more prosperous and successful future for the community have already begun activating this ambitious program of work.



# The Strategic Planning Process



# ENVISION 2047 Overview



Based on the key findings from Phases 1 and 2 and visioning sessions with the Steering Committee, it is reasonable to organize the Summerville and Dorchester County around the strategic framework shown on the following page. **The following page offers a visual representation of the below structure inspired by the “rooted while growing” construction of the vision statement.**

## OUR VISION

The framework begins with the following vision statement: “We are rooted in our shared history and distinctive character while growing a more prosperous and livable community.” This statement reflects two realities:

- Stakeholders understand that their community will continue to grow and that this growth will bring new opportunities.
- Stakeholders do not want to lose traits such as small-town charm, a sense of belonging, shared history, etc. but rather adapt these attributes as the community grows and evolves.

## OUR GUIDING PRINCIPLES

The Framework continues with four key principles that have shaped the development of ENVISION 2047 and will guide its implementation.

## OUR PRIORITIES

To achieve this Core Vision, partners in Summerville and Dorchester County can pursue activities in **seven Priorities** that address key opportunities and challenges and reflect the priorities and aspirations that stakeholders identified through the input process.

Before proceeding, it is important to note that the issues in this framework are not necessarily new; many have been addressed through other strategic plans and ongoing work. This is by design, as developing a vision can be likened to “jumping on a moving train.” Incorporating these issues into ENVISION 2047 can anchor them as shared priorities for partners as they work toward their desired future. There are also many important activities that fall outside the scope of ENVISION 2047. This does not mean that these issues are unimportant or should not be addressed; instead, it acknowledges the reality that vision plans must be focused on the issues that emerge as top priorities if they are to be successfully implemented.



Photo at Top: Google; Photo at Bottom Greater Summerville/Dorchester County Chamber of Commerce

# The ENVISION 2047 Framework

**OUR VISION:** We are **rooted** in our shared history and distinctive character while **growing** a more prosperous and livable community.

**OUR GUIDING PRINCIPLES:** **WORK TOGETHER** on our shared priorities while respecting local needs  
Clearly **COMMUNICATE** our Vision and how we will activate it  
**LEARN** from our experiences and those of others  
**PURSUE EXCELLENCE** through our shared Vision

## **OUR PRIORITIES:**





# Thoughtful Planning



## WHAT IS THE GOAL?

Promote compact development and expanded transportation choices to guide smart and resilient growth.



## WHY IS THIS IMPORTANT?

- As an attractive community in one of the nation’s most desirable metropolitan areas, Summerville and Dorchester County will continue to be in **high demand for new development**.
- The community has engaged in comprehensive planning and made major investments in new infrastructure, but many stakeholders feel the **approach to growth has too often been reactive, not proactive**.
- While growth has brought new opportunities, residents feel it has also led to **sprawl, traffic, loss of open spaces, and other impacts that have diminished quality of life** – a common challenge suburban and exurban communities have faced for many decades.
- Input participants said they want to see a **different approach to future growth** that combines more compact development with enhanced transportation choices to create a true “live-work-play” environment.
- Stakeholders recognize that this will require a **new integrated approach** of coordinated planning, effective regulations, political commitment, and consistent public engagement and communication.



## WHAT ARE THE INITIAL STRATEGIES?

### Communicate and engage

Work with the community to make the case for why smart and resilient development patterns are needed to create a more desirable future.

### Promote smart and resilient growth tailored to local contexts

Ensure that regulations and development tools promote high-quality growth that aligns with the needs of different parts of the community.

### Proactively plan for future infrastructure needs

“Stay ahead of the curve” with transportation, water, sewer, and other forms of infrastructure as the community continues to grow.

### Expand transportation choices and connectivity

Build a flexible transportation network that balances auto-oriented infrastructure with more opportunities for walking, biking, “rolling,” and transit.



## WHO WILL DO THE WORK?

Success in this Priority will require **public and private partners working together** to build support for and activate smart and resilient growth. While the private sector typically invests in new development in response to market demand, local governments have a key role to play in shaping where and how growth occurs through planning and infrastructure.



# Housing Options



## WHAT IS THE GOAL?

Encourage a diverse blend of desirable and attainable housing options for our current and future residents.



## WHY IS THIS IMPORTANT?

- According to Zillow estimates for Dorchester County, the value of a typical for-sale home **nearly doubled** in the past 10 years, while **rents were up 73 percent**.
- Though these increases were smaller than elsewhere in the Charleston metro, concerns are growing that **housing affordability is a major challenge**.
- While many residents have concerns about additional growth, **slowing or stopping housing development would worsen the affordability problem**.
- Many stakeholders **worried that their children will not be able to afford living in the community** if current trends continue.
- Input participants said they would like to see the community **foster a diverse mix of new housing** that appeals to a wide range of individuals and families.
- Stakeholders said there is a need for new housing options **across the economic spectrum**, from attainable workforce housing to executive housing.



## WHAT ARE THE INITIAL STRATEGIES?

### Promote an “incremental” approach to housing

Adopt an approach to allow the “next increment” of housing to help existing neighborhoods evolve with changing demand, e.g., “granny flats” in single-family areas or multifamily in more intensely developed areas.

### Develop attainable workforce housing

Work collaboratively to fund and develop housing that is within reach for critical workers such as teachers, health aides, first responders, and service employees.

### Attract executive housing development

Attract investors and developers willing to create new executive housing to fill an existing market gap that impacts the community’s economic growth.



## WHO WILL DO THE WORK?

Housing development is shaped by **private investment and public policy**. Local governments set the rules (zoning, etc.) that determine what can be built. Ensuring that these rules allow for a variety of housing options – and communicating to stakeholders why this is important – should be a collaborative effort. For issues such as expanding the supply of attainable workforce housing, public, private, and nonprofit entities could play a key role.



# Vibrant Gateways



## WHAT IS THE GOAL?

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Create attractive and welcoming entrances in our community to make strong first impressions and enhance quality of place.



## WHY IS THIS IMPORTANT?

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- **First impressions** are critically important for talent attraction, economic development, and tourism.
- For most individuals, **first impressions are formed along key transportation corridors** that bring people into the community.
- Ideally, these key entrance points should **convey a sense of vibrancy and offer a compelling preview** of the type of community that one is entering.
- Residents expressed concern that the **existing gateways into the community are not welcoming** and do not accurately portray its quality and dynamism.
- Stakeholders desire to **enhance the “curb appeal”** along key corridors through upgrades to the public right-of-way and enhanced private investment.
- In addition to welcoming newcomers, improved gateways would also **boost community pride and enhance amenities** for existing residents.



## WHAT ARE THE INITIAL STRATEGIES?

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### Create public realms that “prime the pump” for private investment

Invest in public streets and corridors that are visually appealing, support a variety of transportation options, and promote vibrant commercial activity.

### Promote attractive development and redevelopment

Create and/or leverage design guidelines, zoning regulations, and financial incentives and tools to encourage attractive and inviting built environments.

### Advance 500 North Main as the “keystone” project

Continue to work collaboratively to reimagine the 500 North Main site to create an attractive new “front door” into the heart of the community’s largest downtown.



## WHO WILL DO THE WORK?

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The look, feel, and development patterns along gateways and key corridors must be supported and informed by a variety of key stakeholders, including local governments, business and property owners, investors, and even outside entities like the state’s Department of Transportation. Informing and advocating for dynamic gateway environments aligned with the Vision will require **influential champions and organizations across the community**.



# Distinctive Places



## WHAT IS THE GOAL?

Create and promote places and amenities that make our community a desirable destination to live, work, and play.



## WHY IS THIS IMPORTANT?

- Increasingly, **economic competitiveness is strongly tied to “quality of place”** influenced by the many factors that make a community a desirable place to live.
- Talented individuals (and the companies that want to hire them) seek to locate in areas that are **attractive and rich with a variety of amenities**.
- Input revealed that the community **already has many “quality of place” assets and amenities** that residents value.
- Residents expressed a desire to **enhance and accentuate these strengths** by continuing to make place-based investments as part of the Community Vision.
- Stakeholders highlighted a variety of opportunities, namely **outdoor amenities, arts and culture, and “placemaking”** in downtowns and commercial centers.



## WHAT ARE THE INITIAL STRATEGIES?

### Engage in “placemaking” to create vibrant commercial centers

Create live-work-play downtowns and community hubs through a blend of public and private investments and small incremental upgrades over time.

### Develop and connect parks, trails, and outdoor amenities

Build upon recent momentum to continue investments in outdoor and recreation amenities while prioritizing connectivity and ease of access for all residents.

### Enrich quality of place through arts and culture

Support and leverage arts, culture, and events to contribute to the community’s overall vibrancy and sense of place.



## WHO WILL DO THE WORK?

Implementation **roles will vary depending on the specific type of placemaking or investment**. Planning, upkeep, and construction of recreation infrastructure is a government function, while arts and cultural development is often funded and overseen by non-profit public-private partnerships. Placemaking and activity district development depends on collaboration between the public sector, business organizations, the finance industry, and key citizen groups.



# Quality Economic Growth



## WHAT IS THE GOAL?

Improve fiscal sustainability and grow wealth-building jobs close to home through proactive economic development.



## WHY IS THIS IMPORTANT?

- Summerville and Dorchester County has long been a **“bedroom community”** where the majority of employed residents commute elsewhere for work.
- In 2022, **four out of five jobs held by a Dorchester County resident were based outside the community**, mostly in Charleston and Berkeley counties.
- This is a key factor in why the U.S. Census Bureau estimates that local workers have **commute times that are 14 percent above the regional average**.
- With fewer jobs, the community also has a **relatively smaller tax base of commercial and industrial properties** that are critical for school funding.
- Stakeholders **desire more jobs and investment** in the community to enhance opportunity, provide options for shorter commutes, and grow the tax base.
- A thoughtful and targeted approach to economic growth can help **minimize negative impacts such as “job sprawl” and excess loss of open spaces**.



## WHAT ARE THE INITIAL STRATEGIES?

### Attract and retain a diverse range of employers in key target sectors

Engage in external business attraction and internal business retention activities to grow jobs in “target” business sectors for which the community has or could have a competitive advantage.

### Prepare for long-term commercial and industrial site needs

Plan ahead to ensure that the community has sufficient development sites and infrastructure (water, sewer, power, etc.) to accommodate future opportunities



## WHO WILL DO THE WORK?

The work of job attraction and retention is typically carried out by economic development organizations (EDOs) such as Dorchester County Economic Development (DCED), the Town of Summerville’s Community and Economic Development division, and so on. The public sector plays an important role in designating and supporting sites for development, while private partners such as chambers of commerce support growth through advocacy and other activities.



# Entrepreneurial Culture



## WHAT IS THE GOAL?

Cultivate a dynamic entrepreneurial ecosystem to grow diverse job opportunities and local businesses that enhance “place.”



## WHY IS THIS IMPORTANT?

- In addition to business attraction and expansion, there is a **third way in which a community can grow new jobs**: entrepreneurship and new business formation.
- Entrepreneurship **builds wealth and enhances economic mobility** in local communities by creating locally owned businesses.
- The community has **advantages to leverage to support entrepreneurship**, including its quality of life, sense of place, and an existing pool of founders.
- Cultivating entrepreneurship can **add balance to the local economy** by promoting growth in creative and technology sectors.
- Locally owned businesses also can **enhance quality of place** by creating vibrant places to gather (e.g., coffee shops) and differentiated retail options.



## WHAT ARE THE INITIAL STRATEGIES?

### Boost the Palmetto Goodwill Microenterprise Accelerator Program

Enhance support for the existing Microenterprise Accelerator Program (MAP), a 12-week small business development course designed to help aspiring entrepreneurs and small business owners in the Charleston Tri-County area.

### Cultivate locally owned businesses that enhance quality of place

Adopt near-term efforts to promote existing entrepreneurial resources while actively seeking to identify potential opportunities to expand programming to diversify the local economy by supporting startups and emerging enterprises in sectors such as professionals services and technology and/or support locally owned small businesses that enhance the community's quality of place and local destination appeal.



## WHO WILL DO THE WORK?

Near-term success will be dependent upon increasing publicity and support for existing entrepreneurial services and resources, including **Palmetto Goodwill** as it operates MAP. Overall, an entrepreneurial ecosystem includes all of the people, organizations, and institutions that support new and small enterprises. Individuals in this space including **entrepreneurs and business owners themselves with support from business-oriented organizations** should convene to identify opportunities to enhance the community's ecosystem over the long run.



# Top-Tier Education



## WHAT IS THE GOAL?

Build a continuum of educational excellence by sustainably funding schools and pursuing an enhanced higher education presence.



## WHY IS THIS IMPORTANT?

- Summerville and Dorchester County's **two well-regarded public PK-12 systems and private schools are major assets** for talent development, retention, and attraction.
- Stakeholders have **raised concerns about the sustainability of public school funding**, particularly for Dorchester School District 2, which has experienced a **major decline in funding** since a state law change in 2008.
- Public input also highlighted the importance of seeing education and training as a **continuum from primary to secondary and post-secondary levels**.
- Stakeholders identified a need to **align education and training with job opportunities**, both existing and emerging.
- Trident Technical College's Dorchester Campus has been a welcome addition; residents said an **enhanced higher education presence** would help more residents continue their education without leaving the community.



## WHAT ARE THE INITIAL STRATEGIES?

### Seek sustainable funding solutions for public schools

Identify and activate an equitable funding model to provide sustainable resources for both of the community's two public PK-12 school districts.

### Align career-focused programming with business needs

Ensure strong connections between existing and prospective employers and education and training providers to help both businesses and individuals thrive.

### Pursue an enhanced higher education presence in the community

Work with Trident Tech and potentially other education partners to increase postsecondary instruction in the Summerville and Dorchester County community.



## WHO WILL DO THE WORK?

Educating and training area students is of course the responsibility of **educational institutions**: public PK-12 districts, private schools, and Dorchester County-based higher education satellite campuses. However, talent production is **strongly informed, guided, and supported by other partners**, including industry, economic development organizations, government, and social services providers.

# APPENDIX : RESEARCH EXECUTIVE SUMMARY



# RESEARCH EXECUTIVE SUMMARY

ENVISION 2047 is built on a foundation of extensive community engagement and quantitative and qualitative analysis. This Research Executive Summary provides a high-level overview of the key findings and themes that influenced the development of the Vision and Three-Year Strategic Action Plan. It begins with a summary of major activities from Phases 1 and 2 of the strategic planning process.

## PHASE 1: STAKEHOLDER ENGAGEMENT

The process began with in-depth stakeholder engagement to gain perspectives and insights from people who live and/or work in Summerville and Dorchester County. It consisted of three primary components:

- **Individual interviews** with approximately a dozen top community leaders
- Ten distinct **focus groups** that engaged more than 100 participants from a wide range of constituencies and geographical locations in the community
- An **online survey** that received more than 3,200 responses

These activities were designed to accomplish the following:

- Identify key community assets, opportunities, and challenges
- Uncover future aspirations and ideas for the community's future
- Challenge stakeholders to be bold in imagining what's next
- Provide all stakeholders with an opportunity to participate
- Ensure the community vision reflects the desires of local stakeholders

The bulk of Phase 1 activities were carried out in April 2025. The public was also invited to attend one of two "Community Vision Briefings" in late August. These briefings took place in St. George and Summerville.

## PHASE 2: COMPETITIVE ASSESSMENT

Phase 2 sought to complement stakeholder perspectives on the community's opportunities and challenges with qualitative and quantitative research and analysis designed to uncover how Summerville and Dorchester County perform relative to national, state, and peer community trends.

Phase 2 began with a review of existing research and plans, projects, and initiatives that are already underway, including recently completed municipal, county, and organizational strategic plans. The BRS team then evaluated a wide range of economic, socioeconomic, demographic, and quality of life data indicators from public and proprietary sources to offer fresh insights into the community's performance and competitive position. Dorchester County's performance was benchmarked relative to the United States, South Carolina, and three comparison counties: Berkeley, SC; Iredell, NC; and York, SC.

While Dorchester County was used as the primary research geography for comparative purposes, BRS also examined certain trends at the sub-county level to identify how development dynamics and growth opportunities vary within the community and gain insights into activity occurring in the portions of the Town of Summerville that are located in neighboring counties. Additionally, the BRS team examined some trends within the context of the broader Charleston Tri-County region to provide a more complete picture.

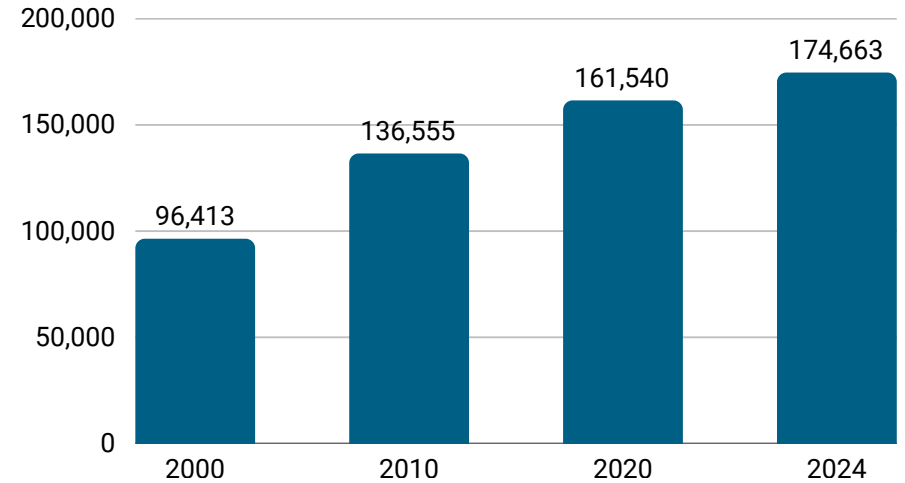
Key findings from Phases 1 and 2 are provided on the following pages; this section concludes with a brief recap of the top **implications for strategic planning** that subsequently informed the creation of ENVISION 2047 and Three-Year Strategic Action Plan.

# POPULATION GROWTH TRENDS

## KEY FINDINGS

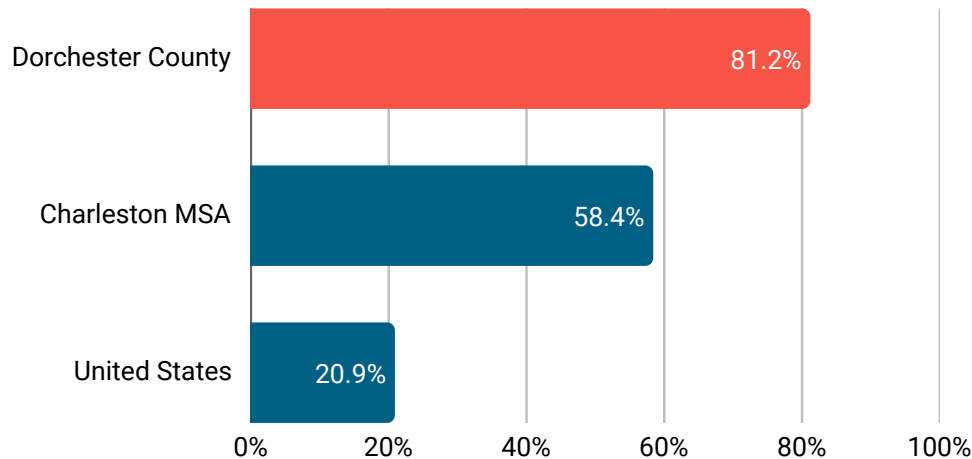
- Dorchester County has experienced significant population growth in recent decades, **adding more than 78,000 residents** between 2000 and 2024, the most recent year for which data were available as of Phase 2 (see Fig. 1)
- Dorchester County was the **fastest growing county in South Carolina between 2000 and 2010**; its growth rate also **ranked 37<sup>th</sup> nationally** out of nearly 750 counties with at least 65,000 residents during this time period
- The community’s 2000 to 2010 growth rate represented an 81 percent increase; it was **nearly four times the national average** and significantly faster than the Charleston region as a whole (see Fig. 2)
- In recent years, **neighboring Berkeley County has experienced even more rapid growth**; according to Census Bureau estimates (see Fig. 3)

**FIGURE 1: DORCHESTER COUNTY POPULATION CHANGE, 2000 TO 2024**



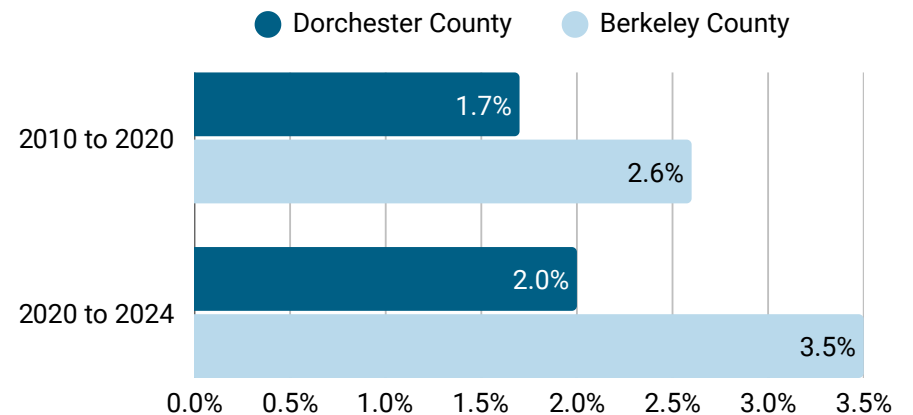
Source: U.S. Census Bureau, Decennial Census and Population Estimates; BRS

**FIGURE 2: PERCENTAGE CHANGE IN TOTAL POPULATION, 2000 TO 2024**



Source: U.S. Census Bureau, Decennial Census and Population Estimates; BRS

**FIGURE 3: POPULATION COMPOUND ANNUAL GROWTH RATES BY TIME PERIOD, 2000 TO 2024**



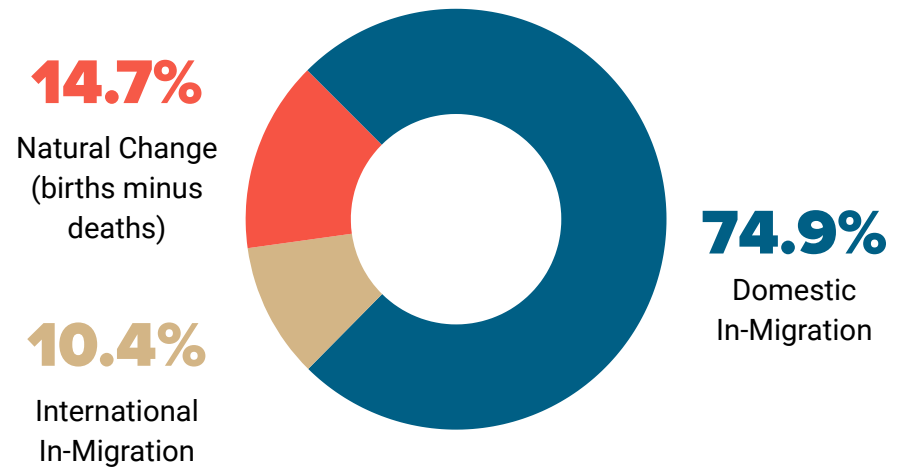
Source: U.S. Census Bureau, Decennial Census and Population Estimates; BRS

# COMPONENTS OF POPULATION GROWTH

## KEY FINDINGS

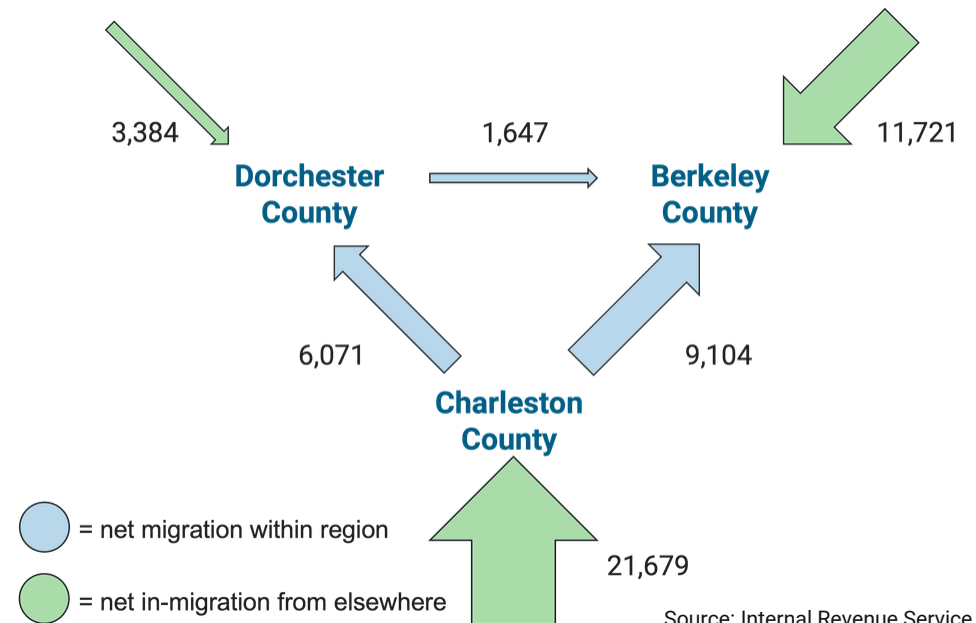
- In recent years, **domestic migration has been by far the largest contributor to population growth** in Dorchester County
- Between 2020 and 2023 (the most recent time period for which data were available in Phase 2), **migration from other counties in the United States accounted for nearly three quarters of total growth** (see Fig. 4)
- According to data from the IRS's Statistics of Income (SOI) program, **Charleston County is the largest single "source" of net domestic migration** to Dorchester County
- **Between 2017 and 2022, Dorchester County netted more than 6,000 new residents who moved from Charleston County** compared to a net gain of approximately 3,400 from all other counties for which data are available (see Fig. 5)
- As Figure 5 also shows, all three counties in the Charleston region were net attractors of new residents from other parts of the state and nation, though **Berkeley and (especially) Charleston counties added many more new residents from outside the region**
- Dorchester County's recent growth is closely linked to the Charleston region's status as a "talent magnet" – while estimates vary, there is broad consensus that the Charleston metro area will continue to attract new residents, which will **drive continued population growth in Dorchester County for which the community should prepare**

FIGURE 4: COMPONENTS OF POPULATION CHANGE FOR DORCHESTER COUNTY, 2020 TO 2023



Source: U.S. Census Bureau Population Estimates; JobsEQ; BRS

FIGURE 5: NET MIGRATION TO AND BETWEEN THE COUNTIES IN THE CHARLESTON MSA, 2017 TO 2022



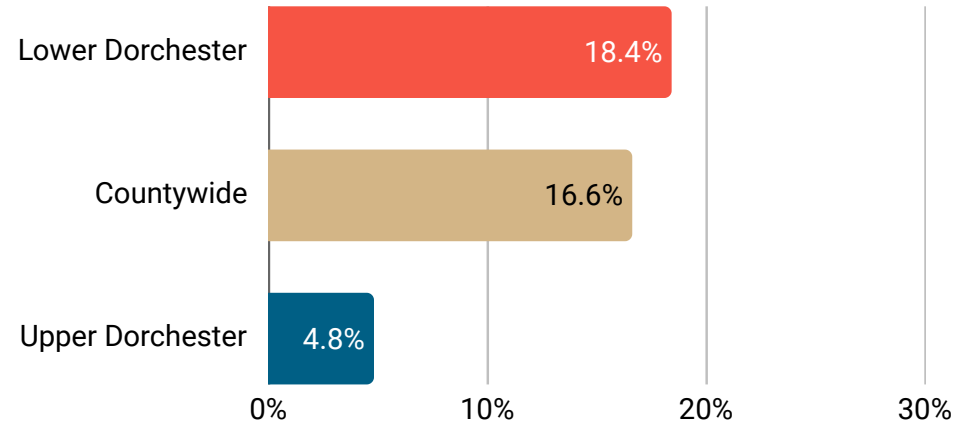
Source: Internal Revenue Service

# LOCAL DIFFERENCES IN GROWTH TRENDS

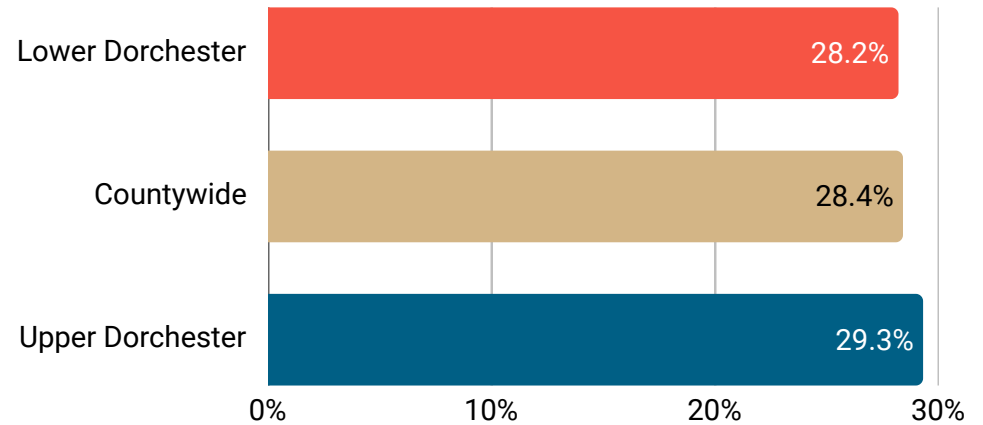
## KEY FINDINGS

- The Census Bureau makes certain data indicators available at the County Subdivision level, denoted by the “CCD” abbreviation; this allows for sub-county comparisons in growth trends between “**Lower Dorchester**” – the Summerville CCD – and “**Upper Dorchester**” consisting of the Harleyville, Reevesville, Ridgeville, and St. George CCDs
- As of 2023, Lower Dorchester accounted for **88 percent of the population** and **85 percent of jobs** despite comprising just **31 percent of the county’s land area**
- Figures 6 and 7 display **10-year population and job growth trends** between 2012 and 2022, the most recent years for which both data sets were available as of Phase 2
- Between 2012 and 2022, **population growth was far more rapid in Lower Dorchester** (see Fig. 6) whereas **the rate of job growth was nearly identical** between the Upper and Lower portions of the community (see Fig. 7)
- Existing development patterns and recent population growth trends differ significantly between Upper and Lower Dorchester
- Stakeholders said that discussions about future growth must recognize these widely varying conditions, with planning and strategies tailored to local contexts
- In particular, stakeholders said that Upper Dorchester’s needs and desired future should be taken into account

**FIGURE 6: PERCENT POPULATION CHANGE BY AREA WITHIN DORCHESTER COUNTY, 2012 TO 2022**



**FIGURE 7: PERCENT EMPLOYMENT CHANGE BY AREA WITHIN DORCHESTER COUNTY, 2012 TO 2022**





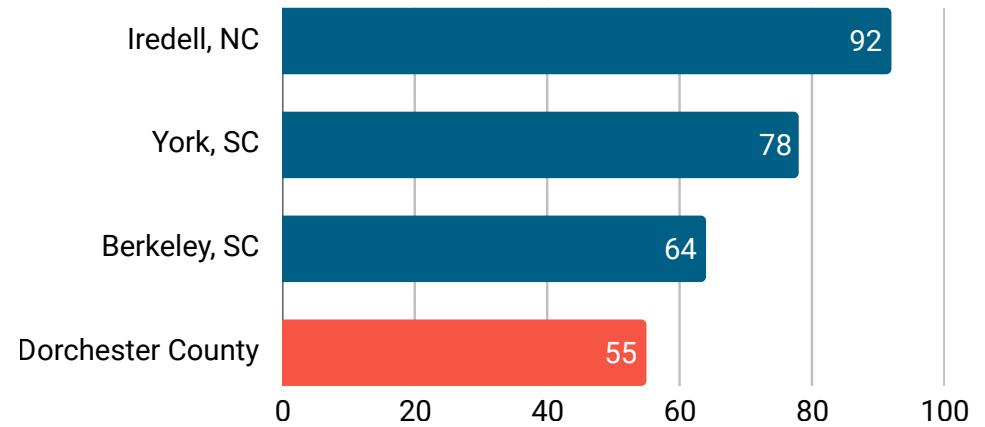


# THE 'BEDROOM COMMUNITY' DYNAMIC

## KEY FINDINGS

- Dorchester County exhibits the characteristics of a “**bedroom community**” where workers outnumber jobs and a significant number of residents commute elsewhere for work
- In the fourth quarter of 2024, there were just 55 jobs based in Dorchester County for every 100 jobs held by a county resident – the **lowest per capita concentration of jobs among comparison communities** (see Fig. 10)
- Nearly **four out of every five jobs held by a Dorchester County resident were based outside the community** in 2022 (see Fig. 11)
- Despite recent economic development successes, this **bedroom community dynamic has deepened in recent years** as population growth has outpaced job growth
- Growth in the Charleston region and an increasing number of Dorchester County residents commuting to Berkeley and Charleston counties for work have **doubtlessly contributed to increased commute times and traffic challenges** that input participants identified as a top concern
- Among Dorchester County residents who work outside the home, **13.6 percent had a one-way commute of at least one hour** according to 2023 Census estimates; this figure is higher than the nation (8.9 percent) and Charleston metro (8.2 percent)

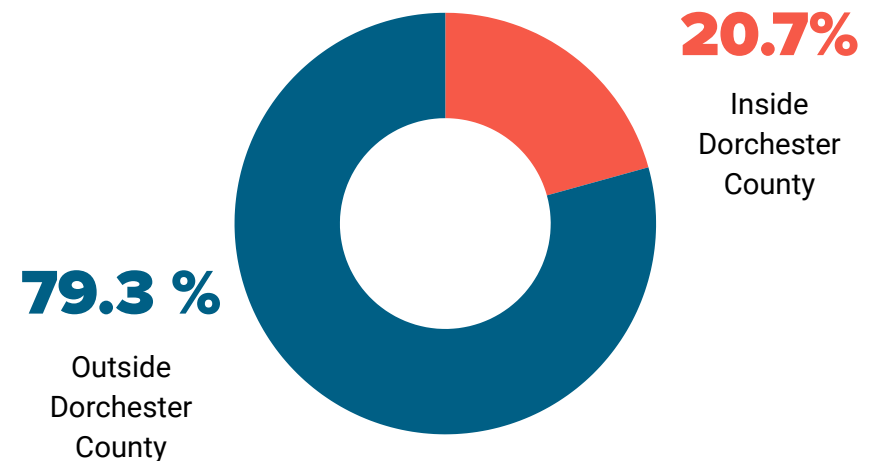
FIGURE 10: NUMBER OF JOBS PER 100 WORKERS, Q4 2024



Source: JobsEQ; BRS

Note: Figures are the ratio of jobs by place of employment to jobs by place of residence.

FIGURE 11: WHERE EMPLOYED RESIDENTS OF DORCHESTER COUNTY WORKED, ALL JOBS, 2022



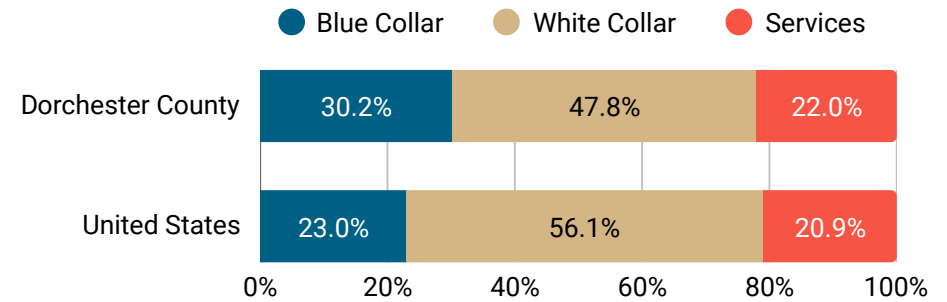
Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD); BRS

# ECONOMIC COMPOSITION + TRENDS

## KEY FINDINGS

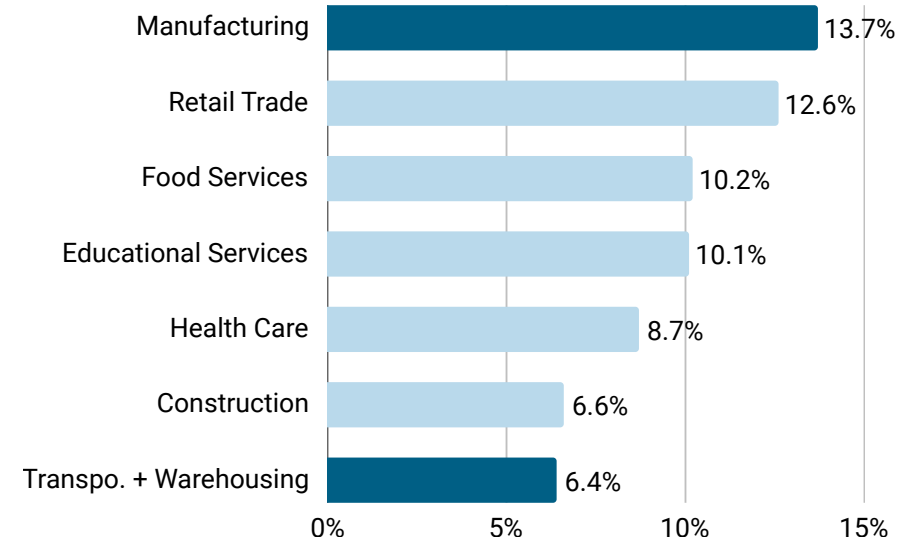
- The total number of jobs based in Dorchester County increased by 31.8 percent between the fourth quarters of 2014 and 2024, **more than double the national average but significantly behind neighboring Berkeley County** (53.4 percent)
- There are relatively **more blue collar jobs and fewer white collar jobs** in Dorchester County than in the national economy (see Fig. 12)
- This is consistent with the community’s sector composition, where **manufacturing is the largest sector by total employment** (see Fig. 13)
- **Other top business sectors primarily serve local populations**; these include retail trade, food services, education, and health care as shown in light blue in Figure 13
- Outside of manufacturing and transportation and warehousing (shown in dark blue in Figure 13), Dorchester County has **relatively low concentrations of traded sectors** that “export” goods or services to other markets and thus bring new wealth into a community such as professional services and headquarter operations
- That said, between the fourth quarters of 2014 and 2024, **traded sector employment grew by 72 percent in Dorchester County – more than four times the national average**; by contrast, local employment in non-traded sectors grew by just 20.3 percent
- **Overall, recent job growth trends are positive** and bode well for continued efforts to create more jobs that align with local skillsets; input participants said they would like to see more of these types of jobs in Dorchester County to **alleviate long commutes and strengthen the community’s tax base**

FIGURE 12: PERCENTAGE OF JOBS BY ‘COLLAR TYPE,’ Q4 2024



Source: JobsEQ; BRS  
Note: Figures are four-quarter moving averages.

FIGURE 13: TOP BUSINESS SECTORS IN DORCHESTER COUNTY BY PERCENTAGE OF TOTAL EMPLOYMENT, Q4 2024 (DARK BLUE = “TRADED” SECTORS)



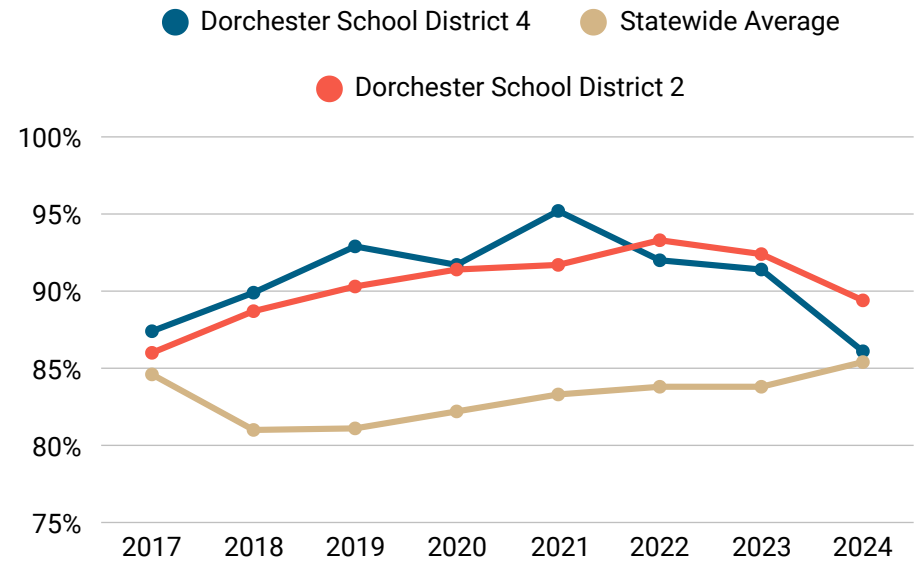
Source: JobsEQ; BRS  
Note: Figures are four-quarter moving averages.

# EDUCATION TRENDS + PERCEPTIONS

## KEY FINDINGS

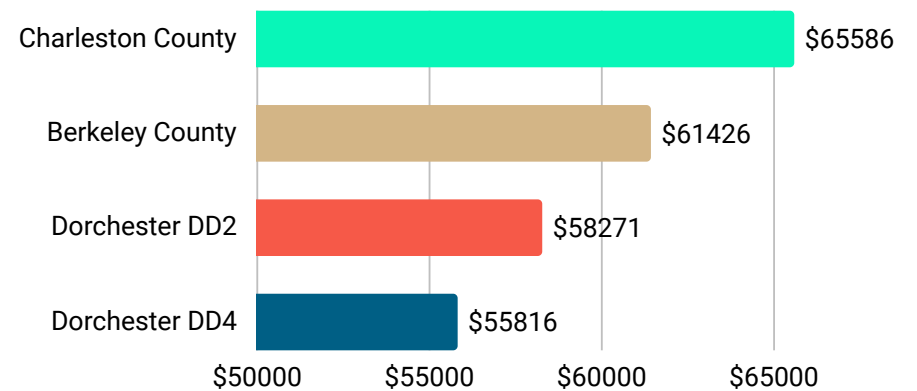
- Stakeholders said that the **perception of generally strong schools is a significant draw for families**; the community is served by Dorchester School District 2 (DD2), Dorchester School District 4 (DD4), and several private schools
- Among online survey respondents who said they were familiar with one of the districts, **majorities said they would be likely to recommend both DD2 and DD4** to prospective families with children
- Data presents a **mixed picture when it comes to public PK-12 schools**, however, with some key indicators above state averages but room for improvement; in particular, on-time graduation rates fell back closer to the statewide average in 2024 after years of being far ahead (see Fig. 14)
- Input participants also expressed concerns that **teacher pay gaps relative to nearby districts are a competitive challenge for both DD2 and DD4**
- Data confirms that the existence of this disparity (see Fig. 15) and additionally reveal that the **pay gap has widened between 2022 and 2024**
- Input participants said that seeking **sustainable funding solutions for public schools** will be an important priority if the community is to **maintain a competitive edge as a destination for families**
- Stakeholders identified two additional ways to enhance Dorchester County's ability to produce "homegrown" talent: 1) **strengthening "talent pipeline" connections** between employers and education providers to prepare students for in-demand careers and 2) developing an **enhanced physical higher education presence** within Dorchester County to complement and connect existing training assets with employer needs

FIGURE 14: 'ON-TIME' GRADUATION RATE, 2017 TO 2024



Source: South Carolina Department of Education; BRS

FIGURE 15: AVERAGE TEACHER SALARY BY DISTRICT, 2024



Source: South Carolina Department of Education; BRS

# QUALITY OF LIFE + QUALITY OF PLACE

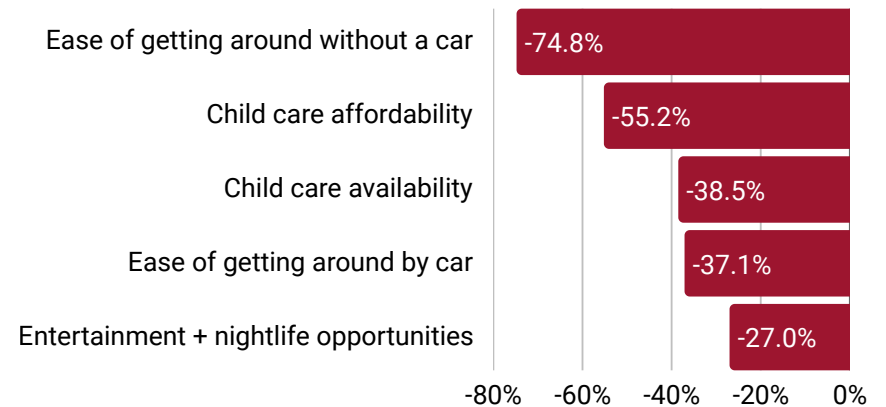
## KEY FINDINGS

- Community aesthetics, public safety, outdoor amenities, restaurants, family-friendly opportunities were viewed as quality of life and **quality of place strengths** by survey respondents (see Fig. 16)
- Other aspects of quality of life and place received highly unfavorable ratings**, including, including transportation (car and other), entertainment and night life, and child care
- While community aesthetics and appearance received the strongest net positive rating among online survey respondents, input participants identified a need to **enhance the appearance and vibrancy of key transportation corridors and “gateways”** to the community to **improve first impressions**
- While stakeholders generally talked in highly favorable terms about Summerville and Dorchester County during interviews and focus groups, survey responses revealed a **negative “net promoter score” (NPS)**
- That is, when asked how likely they would be to recommend the community on a scale of 1 to 10, more respondents picked a rating of six or below than selected a rating of nine or 10; **this is a concerning finding because a net promoter score can be seen as a proxy for how residents feel about their community and its future**

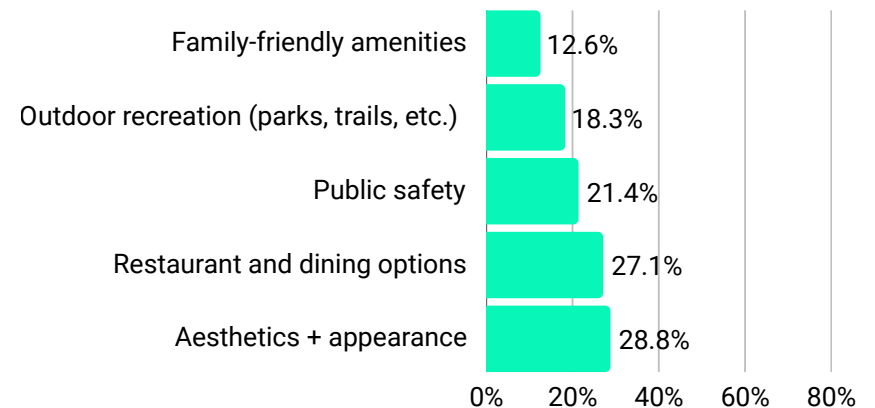
**FIGURE 16: ONLINE SURVEY RESPONSES**

**Rating prompt:** Please rate the following features of Summerville and Dorchester County's quality of life and place.

### Features with the largest net-negative ratings



### Features with the largest net-positive ratings



Source: Summerville and Dorchester County Community Vision Survey; BRS

# IMAGINING THE COMMUNITY IN 2030

## KEY FINDINGS

- The **word cloud at right** displays the most common words that online survey respondents used when asked how they would like to be associated with Summerville and Dorchester County in 2040 (see Fig. 17)
- The word cloud reveals that stakeholders wish to **maintain core aspects of the community's identity** such as its shared history, small-town feel, and family-friendly character
- That said, stakeholders understand that **the community will continue to grow and, accordingly, continue to change**
- Community leaders said they would like to see a **different approach to future growth** that combines more compact development with enhanced transportation choices to create a more balanced “live-work-play” community
- In doing so, stakeholders said it will be important to consider local contexts to **recognize and accentuate the varied geographies, built environments, and cultures within the community**

**FIGURE 17: WORD CLOUD OF ONLINE SURVEY RESPONSES**

**Open-ended prompt:** What are three words or phrases you'd like to see used to describe Summerville and Dorchester County in the year 2040?



Source: Summerville and Dorchester County Community Vision Survey; BRS

