Tennessee Population Projections for 2024-2070

Summary of Findings, Methodology, and Notes

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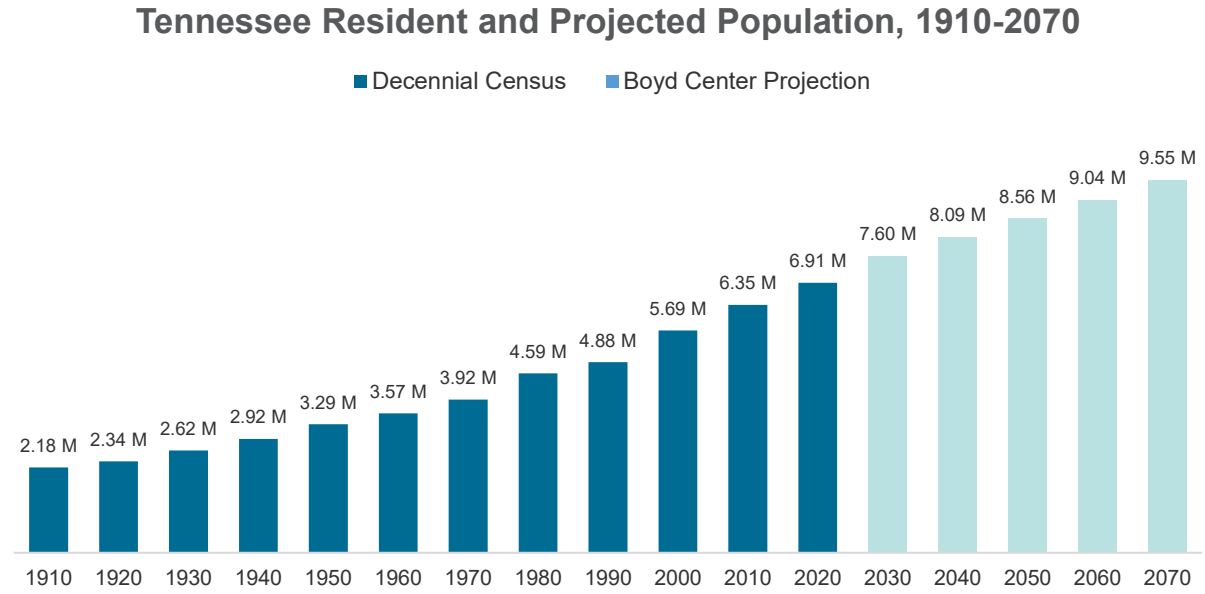
In newly released projections, the Boyd Center for Business and Economic Research (BCBER) predicts that Tennessee's population will reach nearly 8.1 million people by 2040. This will result in the addition of nearly 839,000 new residents to the state's population, which was estimated to be 7.25 million in 2024.

Figure 1: Tennessee's Resident and Projected Population, 1910-2070



U.S. Census Bureau, Boyd Center for Business and Economic Research

From 2020 to 2030, Tennessee's overall growth rate is expected to reach 9.9 percent. The state is expected to add more than 686,000 people over that time and will rank as the second most expansive decade in the state's history. Only the period from 1990 to 2000 saw a larger increase. Both decades are also front-loaded, with a majority of the increases occurring by the midpoint and tapering later in the decade. Beyond 2030, the state's population increases are expected to be lower through the end of the projection horizon. Between 2030 and 2040, the level of growth is projected to be 6.5 percent and will result in the addition of more than 491,000

people over the decade. For the balance of the projection, running from 2040 to 2070, the growth rate is expected to hover between 5.6 and 5.7 percent (Table 1).

Table 1: Tennessee's total projected population increase for 2020 to 2030 is expected to grow 9.9 percent and add a total of 686,241 residents over the decade. The decade-long growth rate will decrease to 6.5 percent by 2040. (U.S. Census Bureau, Boyd Center for Business and Economic Research)

Year	Population	Change	Percent Change
2020	6,912,319	564,735	8.9%
2030	7,598,560	686,241	9.9%
2040	8,090,085	491,525	6.5%
2050	8,555,128	465,043	5.7%
2060	9,038,241	483,113	5.6%
2070	9,549,446	511,205	5.7%

County-level Change

At the county level, the state has experienced widespread population increases to start the decade. In 2024, the projection launch year, 84 of the state's 95 counties gained residents since July 1, 2023. The launch coincides with Tennessee's single-largest year of population increases in state history, an unusually high baseline from which to project. Unsurprisingly, the number of counties with a population increase is expected to soften through the end of the decade. By 2030, 71 counties in the state are expected to see year-over-year growth, with the total falling to 63 by 2040. That pullback would be roughly in line with the 2010 to 2020 period, when 65 counties added population and 30 lost population (Figures 2 and 3).

Growth is also expected to become more geographically concentrated over the projection period. In 2024, 54 counties grew by one percent or more, with gains distributed across Middle and East Tennessee. By 2040, only eight counties are projected to exceed one percent, and the strongest growth is concentrated in the counties surrounding Davidson. Much of West Tennessee outside Shelby County is projected to lose population, while fewer counties in the eastern third of the state will experience any growth.

Figure 2: The percent population change of Tennessee counties from 2023-2024 shows that 84 counties added population, with 54 growing by more than 1 percent. (U.S. Census Bureau)

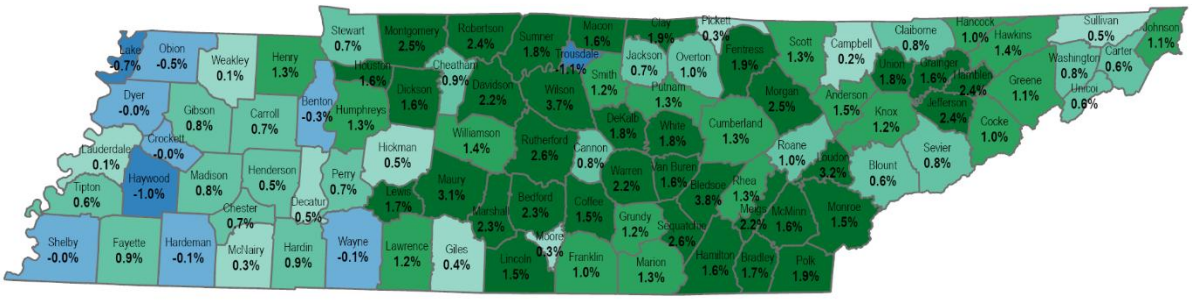
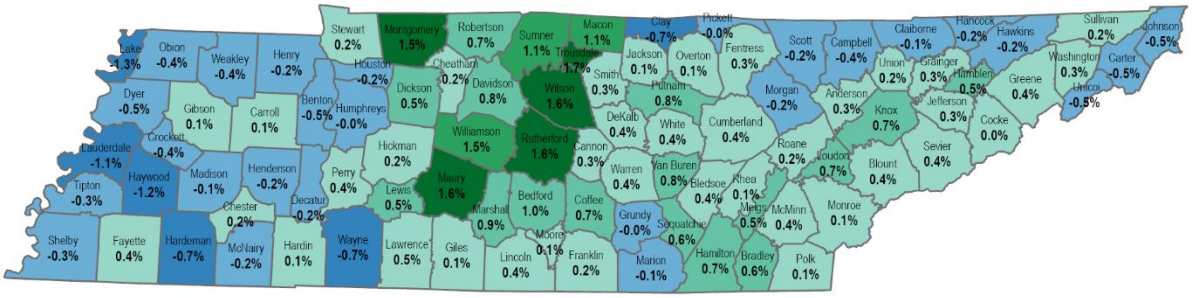


Figure 3: Population change is projected to be positive in 63 of Tennessee's 95 counties in 2040, but only eight counties, all in Middle Tennessee, are projected to exceed one percent growth for the year. (Boyd Center for Business and Economic Research)



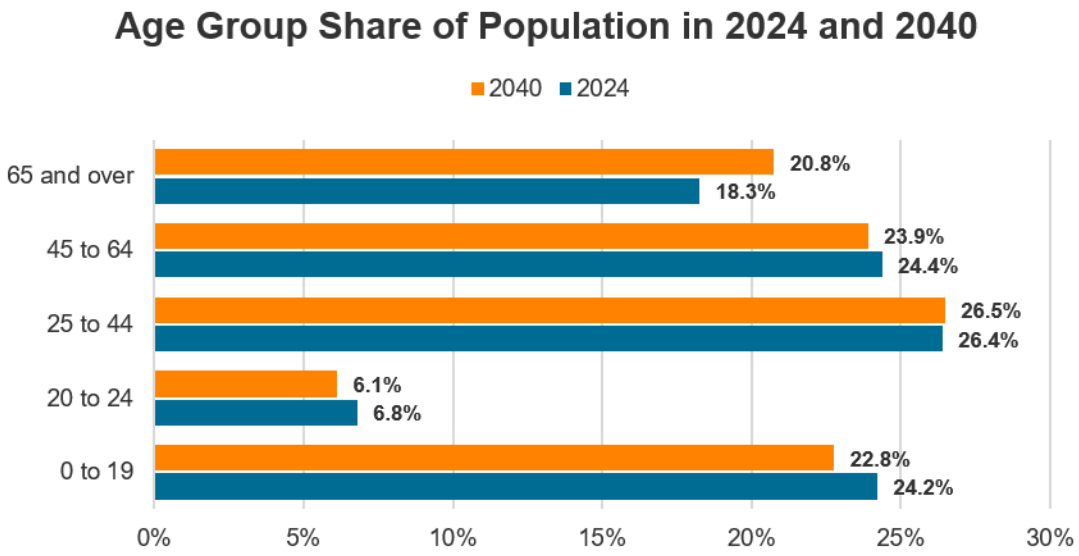
Age Characteristics

While all age groups are expected to grow through 2040, seniors will continue to lead the way. By 2040, nearly 21 percent of the state's population is expected to be aged 65 and older, up from 18.3 percent in 2024 and representing an increase of more than 355,000 people (Figure 4). The early-career population, ages 25 to 44, will show a slight gain in share while adding 228,000 people. All other age groups are projected to shrink as a share of the population but still post net growth through 2040 (Table 2).

Table 2: All age groups in Tennessee are projected to grow between the 2024 base year and 2040. The largest gains occur in the older adult groups, led by an increase of more than 355,000 people age 65 and over, followed by 228,000 in the 25 to 44 group. (U.S. Census Bureau, Boyd Center for Business and Economic Research)

Year	0 to 19	20 to 24	25 to 44	45 to 64	65 and over
2024	1,755,370	492,142	1,913,305	1,766,698	1,323,776
2040	1,841,274	495,062	2,141,679	1,933,212	1,678,858
Change	85,904	2,920	228,374	166,514	355,082

Figure 4: At 26.4 percent of Tennessee's population, early-career adults ages 25 to 44 make up the state's largest age group. Their share is projected to hold roughly steady through 2040, while the 65 and over group grows by 2.5 percentage points — the largest shift of any age group. (U.S. Census Bureau, Boyd Center for Business and Economic Research)



Source: U.S. Census Bureau, Boyd Center for Business and Economic Research

The increasing number of residents making up Tennessee's oldest age groups will be a key feature of this expansion. In 2024, there were more than 128,300 Tennesseans over the age of 85, and approximately 552,500 Tennesseans aged at least 75 years. By 2040, those numbers are expected to increase to nearly 249,600 individuals aged 85 and older and more than 838,300 people who are at least 75 years of age (Table 3).

Table 3: Tennessee's senior population is projected to grow 26.8 percent between 2024 and 2040, from 1.32 million to 1.68 million. The gains are concentrated among the oldest residents, with the 85 and over group nearly doubling at 94.5 percent growth while the 65 to 74 group grows just 9.0 percent. (U.S. Census Bureau, Boyd Center for Business and Economic Research)

Age Group	2024	2040	Change (Percent)
65 to 74	771,275	840,513	69,238 (9.0%)
75 to 84	424,144	588,693	164,549 (38.8%)
85 and over	128,357	249,652	121,295 (94.5%)
All Seniors (65+)	1,323,776	1,678,858	355,082 (26.8%)

Race Characteristics

Tennessee's population will continue to become more racially and ethnically diverse. The number of Hispanic Tennesseans is expected to increase from approximately 605,600 in 2024 to more than one million in 2040. By then, the Hispanic population will comprise 13 percent of Tennessee residents, up from 8.4 percent in the 2024 base year. The Other Races group – including Asian Americans and Pacific Islanders, Native Americans, and individuals of two or

more races — is expected to follow a similar trajectory, growing from approximately 443,300 to 747,900 over the same period. By comparison, the white population is expected to record an increase of only 101,700 people, and the white share of the state's population will fall from 70.3 percent to 64.3 percent by 2040. The number of Black Tennesseans is expected to decline by approximately 14,200, reducing their share of the state's population from 15.2 percent to 13.5 percent (Table 4).

Table 4: Projected growth shows that the Hispanic and Other Races groups account for roughly 90 percent of Tennessee's population gain through 2040. (U.S. Census Bureau, Boyd Center for Business and Economic Research)

Race Group	2024	2040	Change (Percent)
White non-Hispanic	5,098,984	5,200,648	101,664 (2.0%)
Black non-Hispanic	1,103,412	1,089,221	-14,191 (-1.3%)
Hispanic	605,581	1,052,357	446,776 (73.8%)
Other and Two or More Races	443,314	747,859	304,545 (68.7%)

Overview of Projection Inputs

The cohort component model used in the Boyd Center Population Projections for Tennessee is underpinned by the expectation that both long-term and emerging trends pertaining to the components of change—births, deaths, and net migration—will continue to shape Tennessee's population in the future. To that end, our model uses historic population totals and components of population change data to project population by age, sex, and race for each of the state's 95 counties.

Base Population

For our projection, we use 2010 as the base year, and 2024 as the launch year, with age defined by five-year bands starting with a "0-4" group and ending with an "85+" group. Race is delineated as one of four categories combining race and ethnic definitions:

- White alone non-Hispanic
- Black alone non-Hispanic
- All Hispanic
- Other non-Hispanic, including two or more races

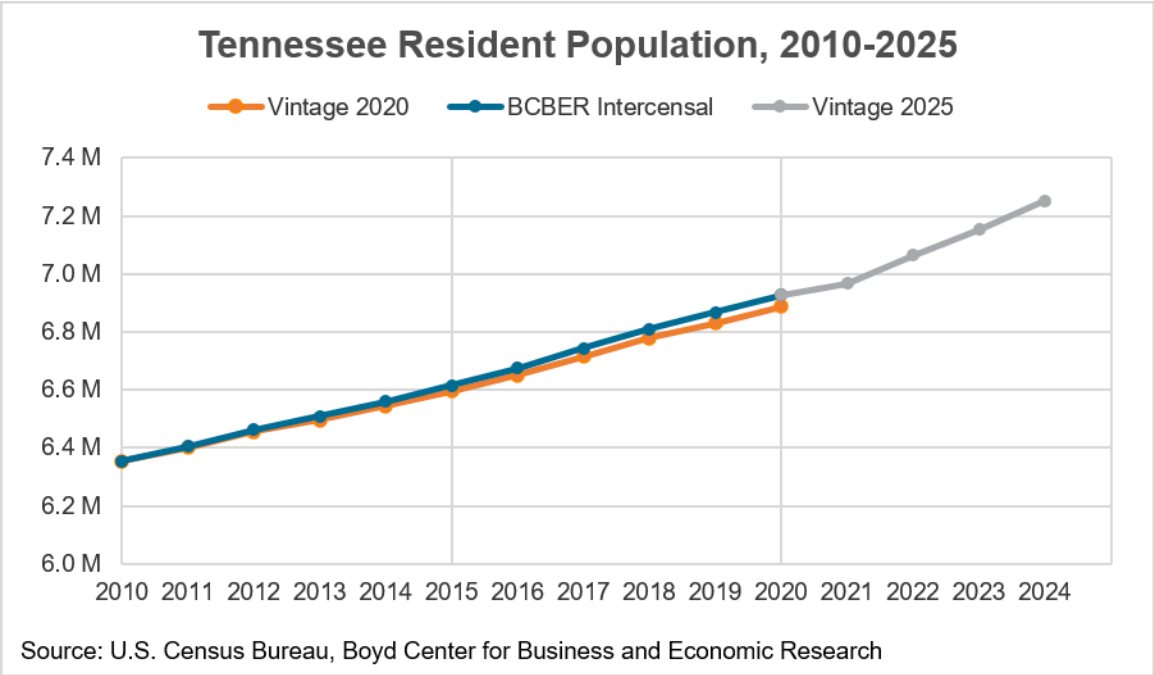
We draw on multiple population estimates vintages to create a continuous series dating back to 2010.

Boyd Center Intercensal Estimates (July 1, 2010-July 1, 2019)

Population and characteristic data from 2010-2019 are from the BCBER Intercensal Population Estimates. These are derived from the Census Bureau's Vintage 2020 Evaluation Estimates, the final 2010-based postcensal series covering July 1, 2010, through July 1, 2020, and are

linked to the Vintage 2025 Population Estimates at the July 1, 2020 endpoint. The difference between the Vintage 2020 Evaluation Estimate and the Vintage 2025 estimate for July 1, 2020, (the error of closure) is distributed linearly across the series, so that each year from 2011 through 2019 receives an adjustment proportional to its distance from July 1, 2010. The advantage of this approach over the Census Bureau's standard intercensal estimates, which connect to the April 1, 2020, decennial census endpoint, is that the Vintage 2025 base population incorporates revisions from decennial challenges and the Post-Census Group Quarters Review (GQR). Additionally, using July 1, 2020, as the endpoint produces a continuous annual series from July 1, 2010, through July 1, 2025, ensuring that structural breaks in the data series are not misinterpreted as actual changes in population.

Figure 5: Boyd Center intercensal estimates resolve the error of closure between the Vintage 2020 series (ending July 1, 2020) and the Vintage 2025 series (beginning July 1, 2020).



Vintage 2025 Population Estimates (July 1, 2020-July 1, 2024)

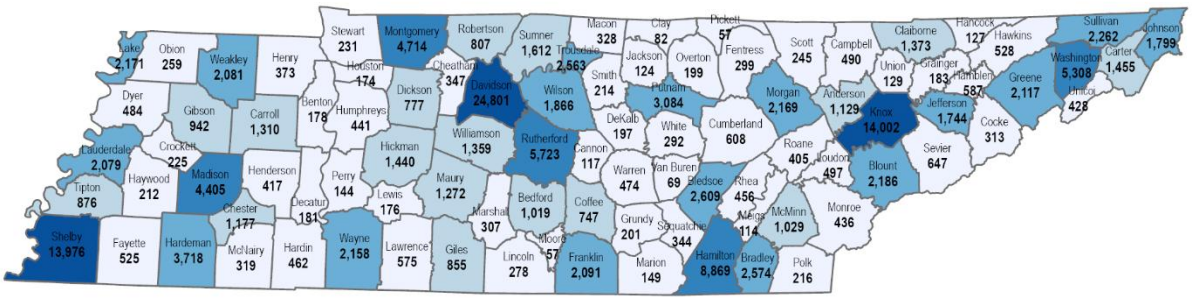
The U.S. Census Bureau's Vintage 2025 County Population by Characteristics covers the period from July 1, 2020, through July 1, 2024. This release is the first this decade to incorporate the 2020 Modified Age and Race Census (MARC) file for April 1, 2020, based on age and race characteristics from the the 2020 Census results. The MARC file serves two purposes. First, it assigns a race to people who selected "Some other race" on the 2020 Census form. The file also corrects "age-only" responses that tend to heap around numbers ending in 0

and 5, which stems from instances where the birthdate of the enumerated person was unknown.[1]

Group Quarters Population

Group quarters population by age, sex, and race/ethnicity was derived from 2020 Census data for each of Tennessee's 95 counties. For White alone non-Hispanic and Hispanic or Latino groups, household population was subtracted from total population. For Black non-Hispanic and Other non-Hispanic groups, where direct household population tables are not available, a proportional allocation method was used. For these two groups, the remaining group quarters population is divided between them in proportion to their shares of the county's population within each age and sex combination.

Figure 6: 2020 Group quarters population by county (U.S. Census Bureau)



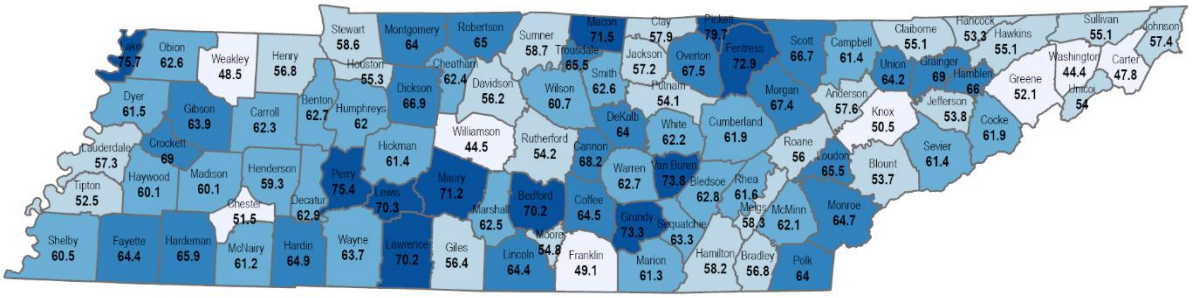
Fertility Rates

County-level fertility rates by five-year age group and race/ethnicity were computed for females ages 15 to 44 using 2023 and 2024 birth data obtained from the Tennessee Department of Health (TDH) and corresponding July 1 population estimates from Vintage 2025. Because the provided TDH birth data is not cross-classified by county, age group, and race/ethnicity, a multi-phase Iterative Proportional Fitting procedure was used to combine fully detailed state-level data from the National Center for Health Statistics (NCHS) with regional and county-level data from TDH, reconciling suppressed cells and maintaining hierarchical consistency across geographic levels. The two-year estimates, controlled to TDH totals, were averaged to smooth small-count noise, and the resulting birth counts were divided by the female population in each

[1] See Eric Jensen, Andrew Roberts, and Luke Rogers, "Age Heaping in the 2020 Census Demographic and Housing Characteristics File (DHC)," *Random Samplings* (U.S. Census Bureau blog), May 25, 2023, https://www.census.gov/newsroom/blogs/random-samplings/2023/05/age-heaping-2020-census-dhc.html. Whipple's index for the national population rose from 101.8 in 2000 and 102.2 in 2010 to 105.9 in 2020, moving the 2020 data from the "highly accurate" to the "fairly accurate" range; the Bureau attributes the increase to a higher share proxy responses, especially when age, but not birthdate is provided.

county, age group, and race/ethnicity category to produce the final fertility rates used in the projections (Figure 3)

Figure 7: County general fertility rate (births per 1,000 females 15–44), pooled 2023–2024 (Tennessee Department of Health, Boyd Center for Business and Economic Research)



Life Tables and Vital Statistics

Eight abridged life tables—for Hispanic, non-Hispanic Black alone, and non-Hispanic White alone populations, each by sex—were constructed by collapsing the 2023 NCHS complete single-year life tables into five-year age intervals that align with the age groups used in the population estimates. Because race-specific life tables for non-Hispanic Other races are not published by NCHS, U.S. total life tables by sex were substituted for this group. A Tennessee adjustment factor was then derived by dividing the state's 2022 probability of dying by the corresponding U.S. probability of dying for each age group and sex, and this factor was applied to each U.S. race- and sex-specific probability of dying to produce the Tennessee-adjusted probability of surviving used to advance each cohort forward in the projection.

Summary of Projection Methodology

Consistent with previous BCBER forecasts, these projections were developed using a cohort-component model and were conducted at the county level for each combination of race/ethnicity, sex and five-year age group. To forecast each county's population for each year from 2025–2070, the model uses the fertility rates, life tables, and net migration patterns described in the preceding sections.

Group quarters populations at colleges, correctional facilities, nursing homes, and similar institutions are isolated from the household population and held constant throughout the projection horizon, as their demographic characteristics are driven by facility turnover rather than cohort aging. This treatment prevents the cohort-component model from inappropriately aging group quarters residents forward and preserves the stable demographic composition that characterizes these facilities.

For each year in the projection, we first predict deaths in each county by age, race/ethnicity and sex by applying the Tennessee-adjusted survival probabilities from the abridged life tables. We then simulate births from the surviving female population using the fertility rates calculated for each county, age group and race/ethnicity category. Finally, we allow for expected net migration as determined by recent trends, and advance to the next year, with the population aging by one year.

Net migration is calculated by simulating the cohort-component model from 2010–2024 using only births and deaths. The difference between the estimated population and the population in the simulation is attributable to annual net migration by county, race/ethnicity, age and sex.

Fertility rates, survival probabilities, and net migration rates are held constant throughout the projection horizon. This reflects the expectation that both long-term and emerging trends in the components of change—births, deaths, and net migration—as captured during the observation period will continue to shape Tennessee's population in the future.

Discussion of Critical Factors Underlying Expected Future Changes

All projections, regardless of their timing, face some level of uncertainty regarding the durability of entrenched trends and the emergence of new ones. Our 2024 projection release is no different, and two sources of uncertainty stand out. First, this update comes on the heels of an exceptional period in which the state experienced a series of population shocks, some entirely unforeseen, whose full effects may not yet be realized. Many of these events will ultimately prove transitory, but in some cases the extent or duration of their impact remains unclear. Second, although net international migration has historically been a comparatively small share of the state's annual growth, it has been a reliable one. Now, levels of international migration into both the U.S. and Tennessee are slowing. To a degree, these projections reflect no information about recent federal immigration policy changes, as the migration assumptions rest on a base period ending in 2024. July 1, 2025, estimates preview the slowdown, but the full-year effect will not appear until estimates for July 1, 2026, are available. As a result, statewide gains could be lower than projected, and some counties projected to grow could instead see net population loss. In this section, we discuss both sets of issues as they are informative about likely revisions to the forecast as more data become available.

Treatment of Dynamic Population Events from 2020 to 2024

Tennessee experienced a series of population events that broke from trend or exceeded prior cyclical peaks. Collectively, these events may be unlike anything seen in the state's history. Yet the net result is that Tennessee has added more people to start the 2020 decade than in any period since 1990. These include:

> **Sharp international migration declines beginning in 2019** – After averaging an annual 9,300-person net migration increase from 2001 to 2018, international migration

fell 64 percent beginning in 2019. It averaged just a 3,300-person net increase through 2021. Immigration policy changes and the pandemic travel restrictions drove the slowdown.

Spike in deaths and death rates in 2020 and 2021 – Deaths rose to 84,200 in 2020. The one-year increase of 12,270 was more than five times the largest increase of the previous twenty years. They grew to over 91,000 in 2021 as COVID-19 related deaths continued to grow. That resulted in an astounding 27% increase in the state's age-adjusted death rate from 2019 to 2021.[2] Through 2024, rates were still 3.6 percent over pre-pandemic levels.

Tennessee's First Natural Decrease – Dating back to at least the 1920s, Tennessee has never experienced a natural decrease – a year when there were more deaths than births. Census Bureau estimates from July 1, 2020, to July 1, 2022, show that this occurred for two years. The state's natural increases had been slowing and a natural decrease was a likely eventuality, but COVID deaths accelerated that outcome.

Single Largest Year of Net Domestic Migration in 2022 – Net change in population from people moving between Tennessee and other states surged to a cyclical peak in 2022, adding more than 82,300 people to the state's population in one year. That eclipsed prior peaks of 53,300 in 1994 and 55,800 in 2006. The marker fell to 60,400 in 2023 and through 2024 and 2025 averaged 44,400, closer to pre-pandemic levels from 2016-2021.

Surging Net International Migration that Peaked in 2024 – Census estimates show international migration began rising in 2022, with growing numbers of humanitarian migrants recorded over three straight years. In 2024, the one-year gain reached a record high of nearly 48,000 people, larger than the state's net domestic migration total. Thee next year, in 2025, net international migration into Tennessee fell 62.5 percent from that peak, to 18,000. It remains to be seen whether the component will stay net positive in 2026.

Largest one-year population gain in state History in 2024 – Elevated net domestic migration and record-high international migration pushed Tennessee to its highest single-year population increase in 2024, adding more than 98,200 people in that year alone.

Attempting to forecast volatility like Tennessee experienced to start the 2020s would be a foolhardy exercise. Instead, these projections, which build on 2010–2024 base data and project 2025 forward, rest on a simpler premise: over a longer horizon, the direction and approximate

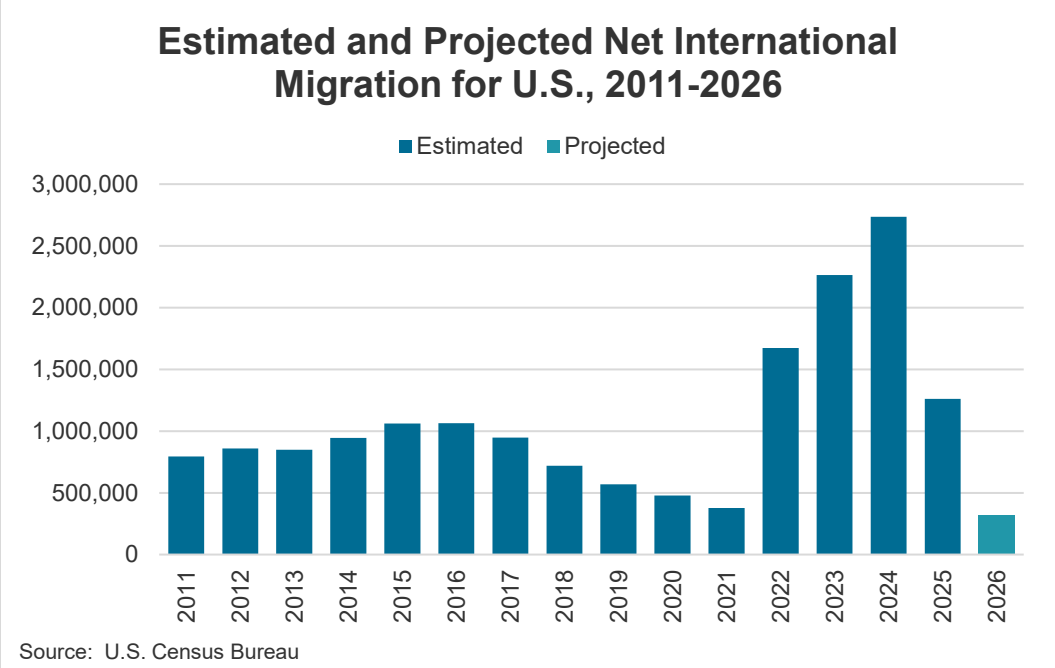
[2] Centers for Disease Control and Prevention, National Center for Health Statistics. National Vital Statistics System, Mortality 2018-2024 on CDC WONDER Online Database, released in 2026. Data are from the Multiple Cause of Death Files, 2018-2024.

pace of established trends are a better guide to the future than the most recent few years. In Tennessee, that premise has held up well. Apart from the slow 1980s, the state has grown steadily since 1970. The 2020s have opened well above that pace, but on the strength of events that are already fading in the data. Accordingly, the projections treat the recent shocks as departures from trend rather than new ones. The one component where the question is still open is net international migration, which rose to the state's largest source of growth in 2024 and has since fallen sharply under policy changes enacted after the 2024 projection launch year. The next section takes up that component in detail.

Uncertain Levels of Net International Migration

After a slow start to the decade, net international migration (NIM) has become the primary driver of population change in the country. In 2024, a 2.73 million person increase in the NIM component pushed the United States to its largest one-year percentage population gain since the mid-2000s.[3] But immigration policy changes beginning in the second half of the 2025 estimate year, resulted in a sharp, 54 percent slowdown in 2025. At the national level, international migration is projected to remain net positive on July 1, 2026, but continued slowing could push the country into negative NIM (Figure 4).

Figure 8: Levels of net international migration during the 2020s ranged from recent lows during the pandemic to large increases in 2022, record highs in 2024 and marked decreases the following year. Projections show the number remaining net positive by July 1, 2026, reflecting a full year of federal immigration policy changes.



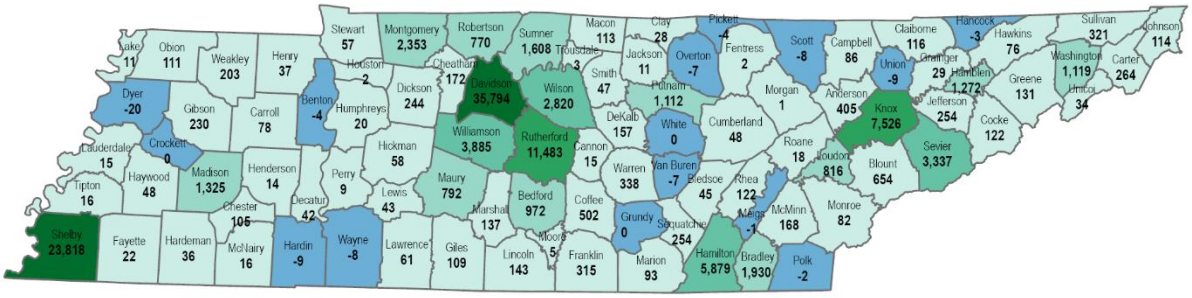
[3] Vintage 2024 estimates released by the U.S. Census Bureau initially reported at the population increase from 2023-2024 was the largest since 2001 and totaled 3,304,757-people. Revised figures from Vintage 2025 show the estimate was lowered by 56,012 people and totaled 3,248,745.

Projections from the Congressional Budget Office in early 2026 show international migration levels recovering to around pre-pandemic averages later this decade. If that holds, a short-term NIM decrease would prove transitory, and the component will continue contributing some positive increment to net migration, as it has in every year of the base period. But a sustained slowdown to near zero, or a shift to net outflow, would constitute a departure from trend. Such a shift could reflect both decreases in inbound flows and increases in outbound flows that resulted from:

- **Slowing foreign-born immigration**, including declining temporary visas for students and workers, fewer asylum seekers, and decreases in undocumented border crossings.
- **Accelerated foreign-born emigration** resulting from voluntary departures, enforcement actions, and the expiration of Temporary Protected Status (TPS).
- **Elevated emigration** among U.S.-born adults leaving for other countries, as well as U.S.-born children departing with their foreign-born parents.

At the state level, the trajectory of the NIM changes has largely followed the U.S. – a slow start, unprecedented increases and an unwinding whose depth is still unknown. From 2020-2025, Tennessee added 115,541 residents through the NIM component. This five-year increase is already more than the decade-long NIM totals from 2000-2010 and 2010-2020, which measured 91,600 and 82,600, respectively. Like its net domestic migration counterpart, this decade's growth in the NIM component in Tennessee has been widespread, with 85 counties showing cumulative gains through the component from 2020 to 2024. Among the remaining counties, losses were marginal. Tennessee's 62.5 percent NIM decrease in the Census Bureau's 2025 estimate was even larger than the national decline. By 2025, that count had fallen to 81 counties, as a handful of counties with slim cumulative gains slipped into negative territory as effects of the broader U.S. slowdown began to be felt locally (Figure 5).

Figure 9: Total of Net International Migration for Tennessee counties from 2020-2025 (U.S. Census Bureau).



Tennessee's NIM increases this decade have also been characterized by a heavy concentration in many of the state's largest counties. 86 percent of the state's total NIM increase landed in just ten of the state's 95 counties. Davidson County's gain of nearly 35,800 people topped all

counties in the state, followed by Shelby County's increases that were in excess of 23,800 people (Table 1).

Table 5: Top 10 Tennessee counties by cumulative net international migration, 2020–2025 (U.S. Census Bureau).

County	2020	2021	2022	2023	2024	2025	Total
Davidson	106	1,050	6,531	8,118	14,102	5,887	35,794
Shelby	39	498	4,180	5,520	9,807	3,774	23,818
Rutherford	15	214	2,136	2,714	4,657	1,747	11,483
Knox	9	208	1,246	1,629	3,139	1,295	7,526
Hamilton	10	185	918	1,187	2,652	927	5,879
Williamson	6	116	839	838	1,324	762	3,885
Sevier	2	55	581	674	1,467	558	3,337
Wilson	1	98	473	591	1,120	537	2,820
Montgomery	6	-50	184	586	1,154	473	2,353
Bradley	0	49	282	493	842	264	1,930

If net international migration shifts into negative territory in 2026, then the same ten counties that captured 86 percent of the state's NIM gain would likely absorb most of the loss as well. But smaller counties, which were already showing population decline, could also see those losses accelerate. That may also be true for counties in the state where NIM was the largest contributing factor to their annual population change (Figure 6).

Figure 10: Predominant source of population change in Tennessee counties in 2025 (U.S. Census Bureau)

In the meantime, this is the best forecast we can provide with the currently available data. For planning purposes, they should continue to serve as a valuable source. Although refinements to improve the data inputs and projection methodology have been made, vintage-to-vintage differences are generally attributable to changes in the demographic landscape that have occurred since the last release. Subsequent releases of the population estimates will lay rest to many of the remaining questions and will likely introduce a new set of uncertainties in their place.