



plan greenville county
Baseline Conditions Report | June 2019

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01 | introduction

This report is the first public document to be published as part of *Plan Greenville County*, the 2019 comprehensive planning effort for Greenville County, South Carolina.

One goal of this report is to provide a broad-based understanding of what Greenville County looks like today. An Existing Conditions section provides a detailed look at the demographic, economic, housing, land use, infrastructure, and other characteristics that characterize this community.

A second goal of this report is to identify a set of peer counties that feature similar demographic, economic, and other community traits. This comparison provides Greenville County the ability to benchmark our community with others to determine how we are performing currently and how we can improve in the future.

A third goal of this report is to provide a summary of community engagement through the first phase of the project. A Community Engagement section offers a summary of “what we heard and learned” during Phase 1 of the project.



02 | existing conditions

This section provides a detailed analysis on the data and trends that describe the current state of Greenville County.

Information within this section is organized by the nine comprehensive plan themes, called elements, required by the State of South Carolina for incorporated jurisdictions. These nine elements, and some of the issues that are detailed within them, are as follows:

- *Population*: population growth, household income, education, race, age, and employment;
- *Economic Development*: employment density, employment by sector, regional shares analysis;
- *Natural Resources*: sensitive and preserved lands, ecological framework, and parks and recreation facilities;
- *Cultural Resources*: historic buildings and districts, museums, theaters, and the special places that tell the story of the community;
- *Community Facilities*: water, sewer, and fire service, as well as libraries and schools;
- *Housing*: residential units by tenure, type, and age as well as housing affordability and spatial distribution;
- *Land Use*: analysis of the mixture of public, private, industrial, and park lands that comprise the county; and
- *Transportation*: the existing county road network, roadway design standards, freight, rail, and air travel, as well as bicycle and pedestrian modes.
- *Priority Investment*: analysis of projected federal, state and local funds available for public infrastructure and facilities as well as recommended projects for these funds, with coordination among adjacent jurisdictions and other partners as a primary driver. (Note: This report does not include a Priority Investment section, as these ideas and recommendations will be developed later in the planning process.)

Grow

Population Element

Population Characteristics

Greenville County is home to the fastest-growing population in Upstate South Carolina. Greenville County has grown at a rate of 14% since 2010, and had a 2018 population of 513,431.

The median household income in Greenville County was \$53,739 in 2017, which is almost \$5,000 more than the state median, but still less than the national same-year figure.

Greenville County had an average household size of 2.58 people in 2017, which is comparable to the state median, but slightly less than the national same-year figure.

Greenville County has a slightly higher percentage of renters compared to the rest of South Carolina, with about 34% of the population renting and 66% owning their homes in 2017.

In 2018, the population of the county was 68.5% white, which was a higher percentage compared to the state and national averages, but the county has a slightly higher black population compared to the nation at 18.5%.

In 2018, the majority of the labor force (64%) in Greenville County was employed in white-collar jobs, with fewer people engaged in blue-collar and service work.

Demographic Trends

While Greenville County is expected to continue growing, the population will look different in the future. Greenville County has an increasingly diversifying population in terms of age, education, income, and background.

The population of Greenville County is expected to grow older, with the median age expected to be 39.5 years in 2023 compared to the 2018 median age of 38.6 years.

Additionally, 37,486 people will be between the ages of 30 and 34 in 2023, which will be the largest age cohort in Greenville County.

The Census Tracts that have experienced the highest population growth are expected to see continued high growth, with the Census Tracts surrounding the City of Greenville experiencing substantial population growth as well.

2018 Population Density

513,431 Total Population

FOR GREENVILLE COUNTY, 2018

14%

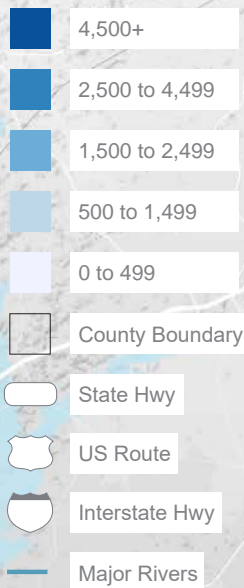
Growth Since 2010

8%

Anticipated Growth
by 2023

Source: ESRI Business Analyst

Population Density per Square
Mile by Census Tract, 2018



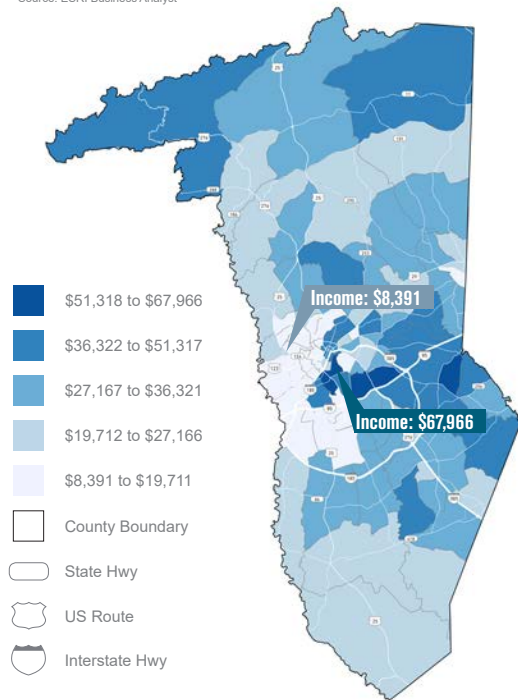
15.1/Sq Mi

6466.5/Sq Mi

2MI

2018 PER CAPITA INCOME BY CENSUS TRACT

Source: ESRI Business Analyst

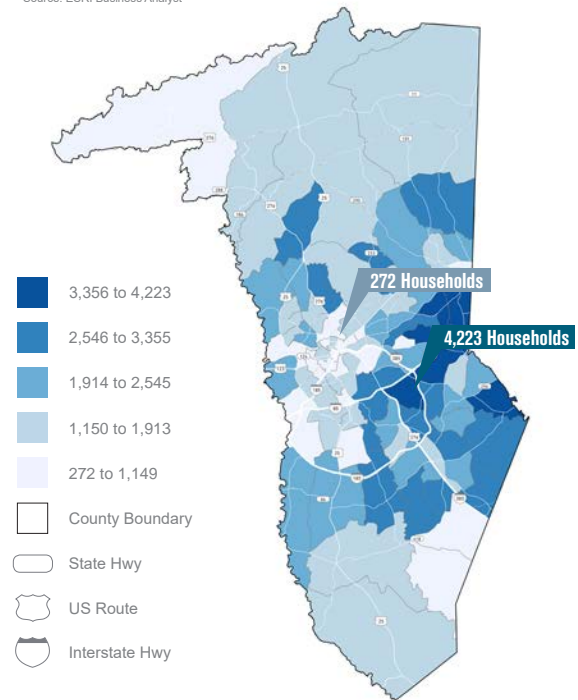


\$30,598 Average Per Capita Income

Source: ESRI Business Analyst

2018 TOTAL HOUSEHOLDS BY CENSUS TRACT

Source: ESRI Business Analyst



200,878 Total Households in Greenville County

Source: ESRI Business Analyst

POPULATION CHARACTERISTICS



\$53,739

Median Household Income

» \$48,781 (S.C.)
» \$57,652 (U.S.)

Source: US Census Bureau (2013-2017), 2017 dollars

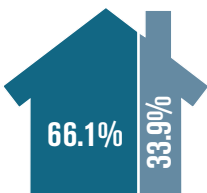


2.58

Average Household Size

» 2.54 (S.C.)
» 2.63 (U.S.)

Source: US Census Bureau (2013-2017)



Homeowners

» 68.6% (S.C.)
» 63.8% (U.S.)

Renters

» 31.4% (S.C.)
» 36.2% (U.S.)

Source: US Census Bureau (2013-2017)



261,021 (51.5%)

Females

» 51.5% (S.C.)
» 50.8 (U.S.)



245,816 (48.5%)

Males

» 48.5% (S.C.)
» 49.2% (U.S.)

Source: US Census Bureau (2018 estimates)



38.6

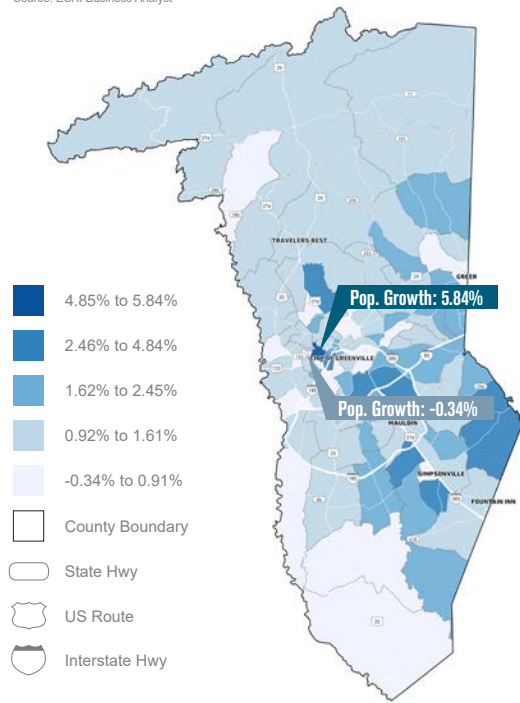
Median Age

» 39.4 (S.C., 2017)
» 38.0 (U.S., 2017)
Compared to 37.1 in 2010
and the expected 39.5
Median Age in 2023.

Source: ESRI Business Analyst; US Census Bureau (2017 estimates)

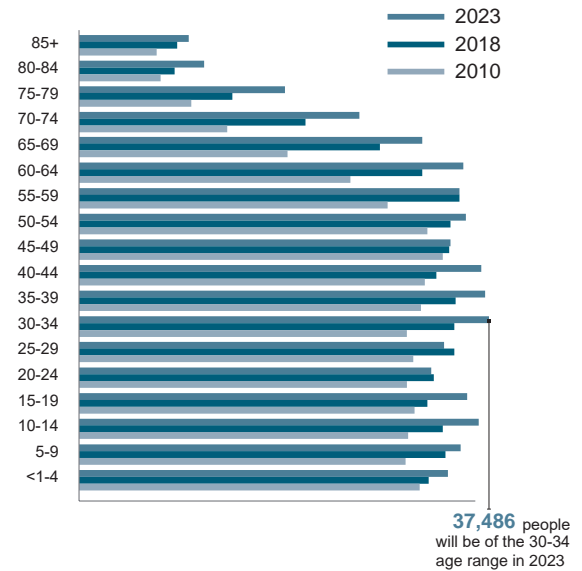
2018-2023 POPULATION GROWTH BY CENSUS TRACT

Source: ESRI Business Analyst



TOTAL POPULATION BY AGE

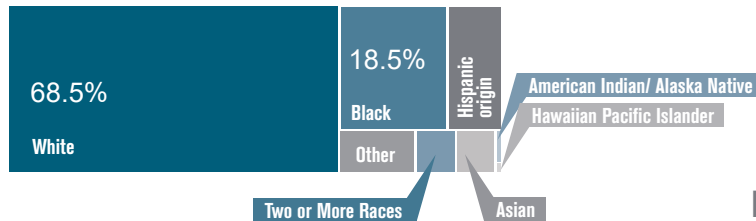
Source: ESRI Business Analyst



» Greenville County's population distribution by age closely follows both state and national trends.

RACIAL COMPOSITE

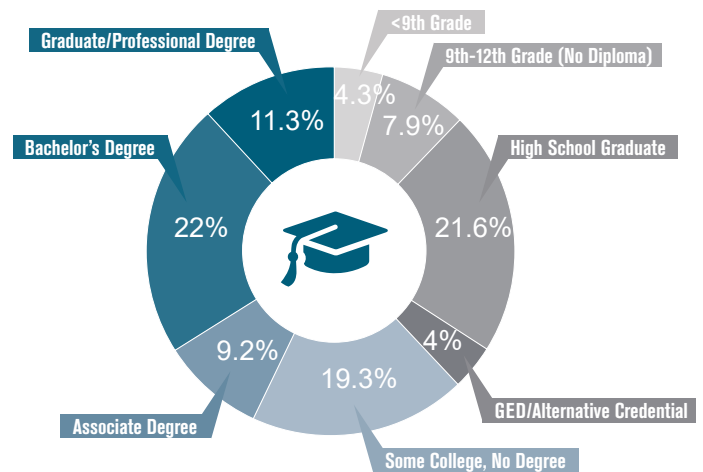
Source: ESRI Business Analyst; US Census Bureau



» Greenville County is more white than both South Carolina and the U.S., but has a slightly higher black population compared to the nation.

EDUCATIONAL ATTAINMENT

Source: ESRI Business Analyst; US Census Bureau



» Greenville County's population has a slightly higher rate of people having earned a Bachelor's degree or higher (33.3%) compared to South Carolina (27%) and the U.S. (30.9%).

EMPLOYMENT

Source: ESRI Business Analyst



64%

White Collar



22%

Blue Collar



15%

Services

Work

Economic Development Element

Employment Characteristics and Trends

In 2018, there were approximately 245,000 jobs in Greenville County, with the top three employment sectors being: financial, real estate, and professional services (26.3%); education, healthcare, and public services (22%), and manufacturing (17.3%).

The majority of employment in Greenville County is concentrated in the middle-third of the county, with major employment hubs including Downtown Greenville, the Haywood Road area, South Carolina Technology and Aviation Center (SC-TAC), and the Clemson University International Center for Automotive Research (CU-ICAR).

Additionally, in 2018, Greenville County experienced the third lowest unemployment rate of all counties in South Carolina at 2.8%.

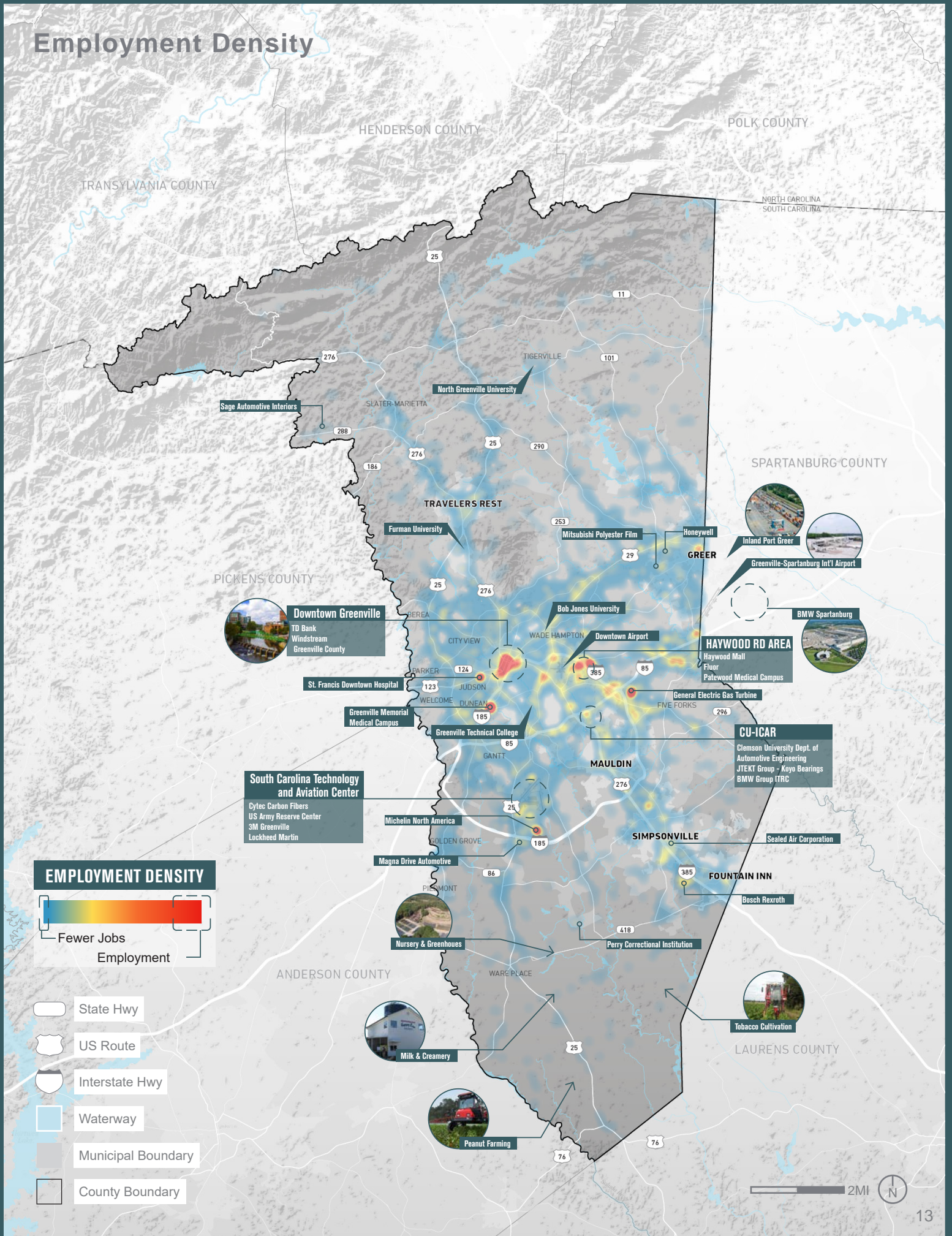
Economic Impact

Greenville County plays a significant role in the Upstate economy. The county alone accounts for nearly 40% of the total jobs in the ten-county Upstate region.

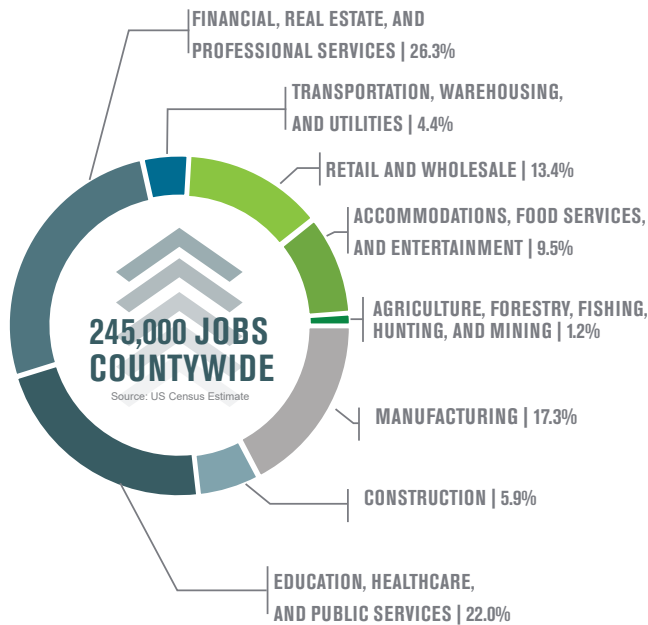
The Greenville-Spartanburg International Airport, which is located in both Greenville and Spartanburg Counties, supported almost \$300 million in annual tax revenue in 2018.

Greenville County's tourism industry is also a key component of the local economy. In 2018, tourism accounted for \$1.2 billion in annual visitor spending, resulting in over \$72 million in annual tax revenue for the county. That same year, the tourism economy supported 10,300 jobs in Greenville County.

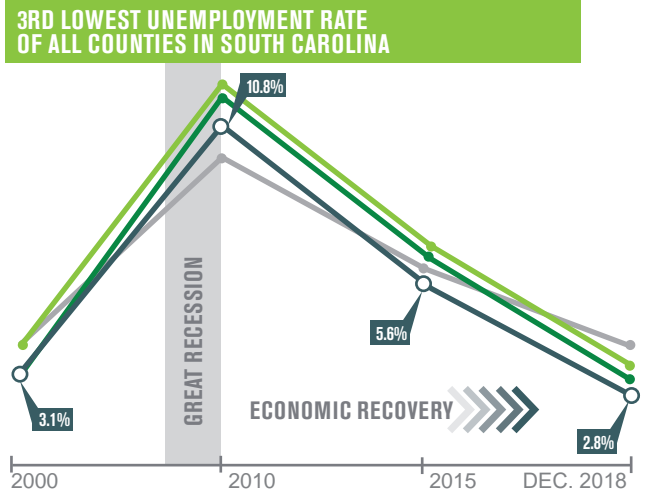
Employment Density



EMPLOYMENT BY SECTOR



UNEMPLOYMENT RATE COMPARISON



LEADING INDUSTRIES



AEROSPACE

Leaders in aerospace such as Lockheed Martin Aircraft and Honeywell chose Greenville County as home because of our proximity to original equipment manufacturers such as Boeing, Gulfstream, and Airbus and because of our powerful synergies in mobility, materials, and research and manufacturing.



LIFE SCIENCES

Greenville County is recognized as an emerging biotech hub with centers for research in biomaterials, devices, genetic conditions, genomic profiling, and cancer research with South Carolina's School of Medicine-Greenville, Prisma Health, and Bon Secours St. Francis Health System leading the way in research and wellness.



ENGINEERED MATERIALS

The Upstate develops and produces innovative materials in the areas of plastics, optics/photonics, textiles, ceramics, and metals used as the building blocks for some of the world's most complex products. The region's portion of those employed in the sector is 77% above the national average and growing.



AUTOMOTIVE

With more than 250 automotive-related companies, the Upstate continues to be a prime location for the automotive industry. Home to industry leaders BMW, ZF, Borg Warner, Bosch, and Michelin, as well as the Clemson University Intl. Center for Automotive Research, the Upstate is a national leader in automotive research and manufacturing.

SHARE OF UPSTATE JOBS BY SECTOR

GRENVILLE COUNTY HOLDS NEARLY 40% OF TOTAL JOBS IN THE 10-COUNTY UPSTATE REGION

MANUFACTURING

39%

CONSTRUCTION

54%

EDUCATION, HEALTHCARE, AND PUBLIC SERVICES

34%

FINANCIAL, INFORMATION, AND PROFESSIONAL SERVICES

49%

TRANSPORTATION AND WAREHOUSING

46%

RETAIL AND WHOLESALE TRADE

34%

ACCOMMODATIONS AND FOOD SERVICES

36%

AGRICULTURE, FORESTRY, FISHING, HUNTING, AND MINING

14%

Source: EMSI Q4 2018 Data Set

REGIONAL ECONOMIC IMPACTS



INLAND PORT GREER

Inland Port Greer opened in 2013, extending the Port of Charleston's reach more than 200 miles inland, and providing shippers with access to more than 95 million consumers within a one-day drive.



GREENVILLE-SPARTANBURG INTERNATIONAL AIRPORT

Increased investment and activity at the Greenville-Spartanburg International Airport have resulted in an economic impact that is more than eight times greater than it was 10 years ago.



BMW SPARTANBURG

Located just outside Greenville County, the BMW Spartanburg production plant contributes directly to the local economy as well as indirectly by supporting suppliers and the allied automotive sectors.



GREENVILLE TOURISM & VISITORS

Visitors from all around the globe travel to Greenville County to experience unique local offerings, the scenic and recreational opportunities in the Blue Ridge Mountains, and for business purposes. Target marketing has helped to increase visitors and grow the economic benefits of tourism.

\$53 BILLION Annual Economic Activity

188,000 JOBS Supported by Inland Port

\$912 MILLION Supported Annual Tax Revenue

Source: USC Darla Moore School of Business Study, 2015

\$2.9 BILLION Annual Economic Activity

\$740 MILLION Annual Spending Locally by GSP Passengers

\$294 MILLION Helps Support Annual Tax Revenue

Source: GSP International Airport Economic Impact Study, 2018

\$16.6 BILLION Annual Economic Activity

30,800 JOBS Direct and Indirect Jobs Associated with the Plant

\$1.8 BILLION Direct and Indirect Labor Income Generated

Source: USC Two Decades of Economic Development, 2014

\$1.2 BILLION Annual Visitor Spending

\$72.3 MILLION Annual Tax Revenue Gained From Visitor Spending

10,300 JOBS Help Support Wages and Salaries for Jobs

Source: Visit Greenville Research and Statistics, 2018

Preserve

Natural Resources Element

Current Natural Systems

According to the U.S. Environmental Protection Agency, Greenville County is home to two distinct ecoregions, the Blue Ridge and Piedmont.

Several significant rivers and tributaries can be found in Greenville County, including the Reedy River, Enoree River, and Saluda River.

The South Carolina Department of Natural Resources completed its last study of landcover in Greenville County in 2001. At the time, 55% of the county was covered by forest or woodlands. It may be safely assumed that the area of the county covered by forest or woodlands is lower in 2019 than in 2001.

Threats to Natural Resources

Current land development practices pose a threat to the abundance and quality of the Greenville County's natural resources and environment.

Many streams and waterways in Greenville County are designated as impaired, which means that they do not meet SC DHEC water quality standards.

Additionally, there are 22 species of plants and animals in Greenville County that are listed as endangered, threatened, or at-risk. Typically, these designations are linked to habitat loss.

Parks and Recreation

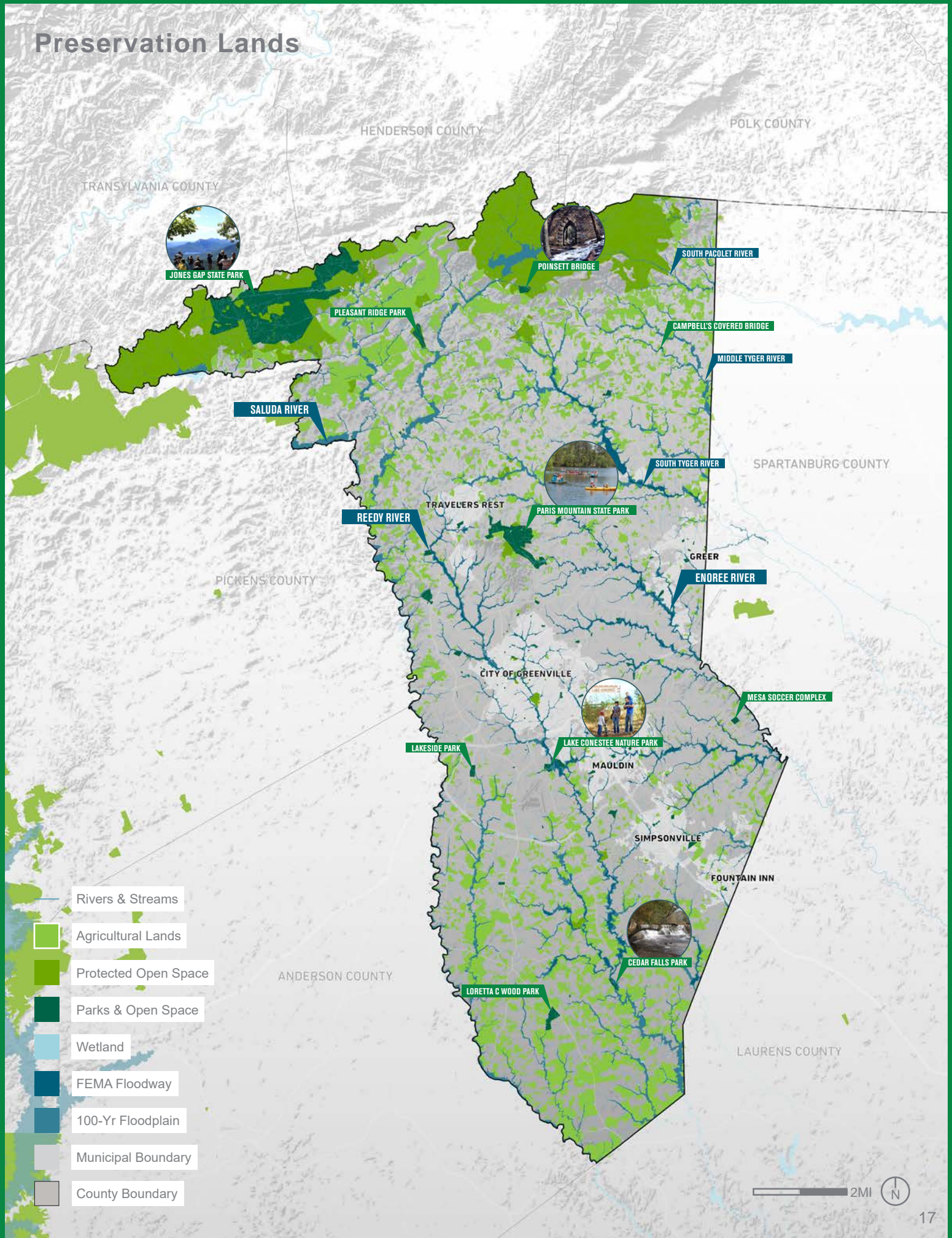
Overall, Greenville County is home to 2,000 acres of parklands, a figure which includes state, municipal, and county-owned properties.

Significant state parks within the county include Paris Mountain State Park, Jones Gap State Park, and Caesars Head State Park.

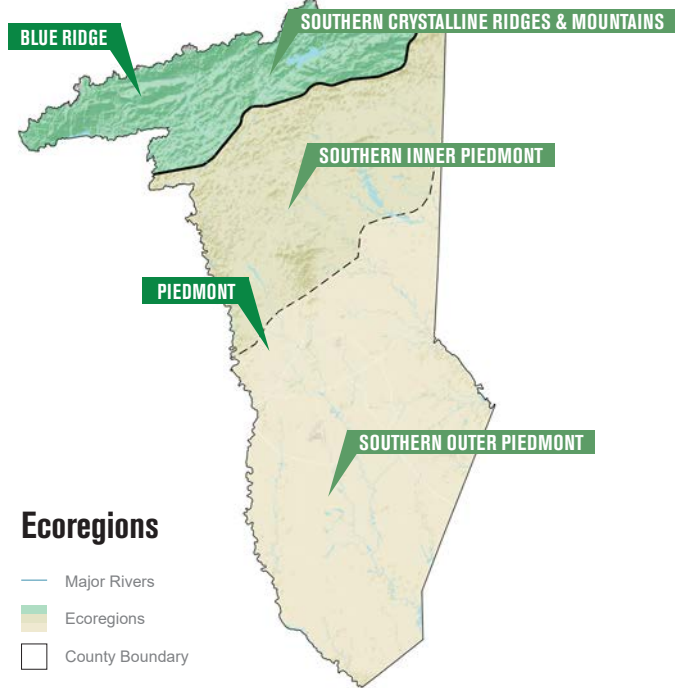
Greenville County Recreation manages over 55 parks and recreation facilities across the county. These facilities include Cedar Shoals Park, MESA Soccer Complex, and Pleasant Ridge Park.

Greenville County Recreation also owns and manages the Prisma Health Swamp Rabbit Trail, a 22-mile multi-use greenway that connects the cities of Travelers Rest and Greenville along the Reedy River corridor. In the coming years, the Swamp Rabbit Trail will extend from Greenville to Mauldin along a railroad corridor that parallels US Highway 276.

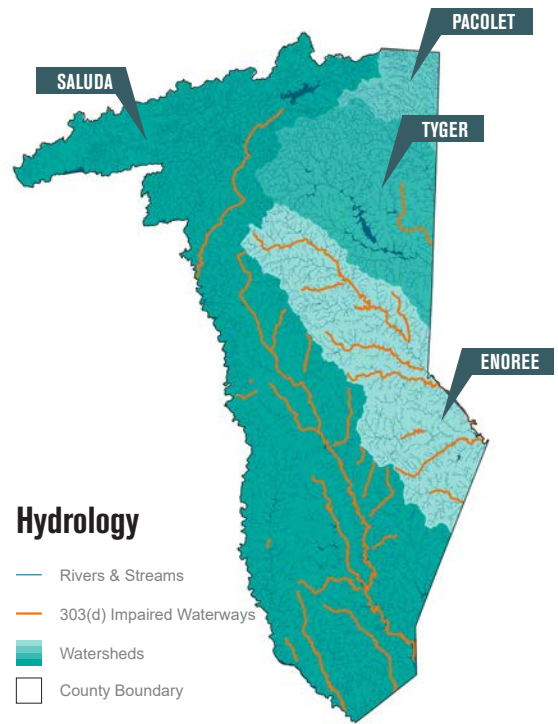
Preservation Lands



ECOLOGICAL FRAMEWORK

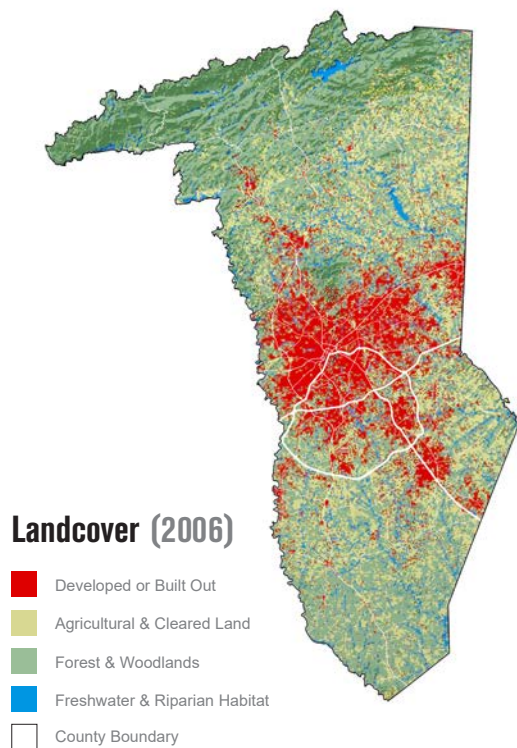


Source: Environmental Protection Agency

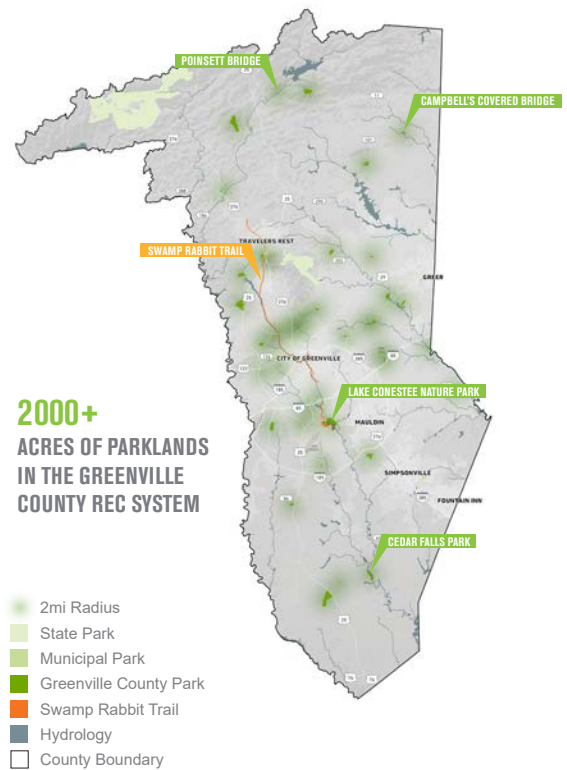


Source: Greenville County & Environmental Protection Agency

GREENVILLE COUNTY PARKS



Source: 2006 SCDNR Gap Analysis



QUALITY & CHARACTER

BLUE RIDGE ECOREGION



"The Blue Ridge extends from southern Pennsylvania to northern Georgia, varying from narrow ridges to hilly plateaus to more massive mountainous areas with high peaks. The mostly forested slopes, high-gradient, cool, clear streams, and rugged terrain occur primarily on metamorphic rocks with minor areas of igneous and sedimentary geology. Annual precipitation of over 100 inches can occur in the wettest areas, while dry basins can average as little as 40 inches. The southern Blue Ridge is one of the richest centers of biodiversity in the eastern U.S. It is one of the most floristically diverse ecoregions, and includes Appalachian oak forests, northern hardwoods, and, at the highest elevations in Tennessee and North Carolina, Southeastern spruce-fir forests. Shrub, grass, and heath balds, hemlock, cove hardwoods, and oak-pine communities are also significant."

Source: Environmental Protection Agency

PIEDMONT ECOREGION



"Considered the non-mountainous portion of the old Appalachians Highland by physiographers, the northeast-southwest trending Piedmont ecoregion comprises a transitional area between the mostly mountainous ecoregions of the Appalachians to the northwest and the relatively flat coastal plain to the southeast. It is a complex mosaic of Precambrian and Paleozoic metamorphic and igneous rocks with moderately dissected irregular plains and some hills. Once largely cultivated, much of this region is in planted pine or has reverted to successional pine and hardwood woodlands. The historic oak-hickory-pine forest was dominated by white oak (*Quercus alba*), southern red oak (*Quercus falcata*), post oak (*Quercus stellata*), and hickory (*Carya* spp.), with shortleaf pine (*Pinus echinata*), loblolly pine (*Pinus taeda*), and to the north and west, Virginia pine (*Pinus virginiana*). The soils tend to be finer-textured than in coastal plain regions, known as blackjack oak prairies."

Source: Environmental Protection Agency

QUICK FACTS

»» 55+

State-of-the-Art Parks & Recreation Facilities in Greenville County

Source: South Carolina Department of Natural Resources



»» 22

Plant & Animal Species in Greenville County Listed as Endangered, Threatened, or At-Risk

Source: South Carolina Department of Natural Resources



»» 2001

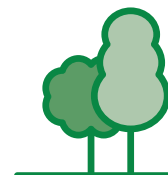
Greenville County passed Greenville County Flood Damage Prevention Ordinance

Source: Greenville County



»» 55%

of Greenville County was Covered by Forest and Woodlands in 2001



Enrich

Cultural Resources Element

Historic and Scenic Assets

Greenville was once the epicenter of the global textile industry. The historic textile mills and surrounding mill villages remain important reminders of this heritage. Today, ten mills are listed on the National Register of Historic Places.

Other significant historic sites are found throughout Greenville County and include historic homes, churches, commercial buildings, and designated historic districts.

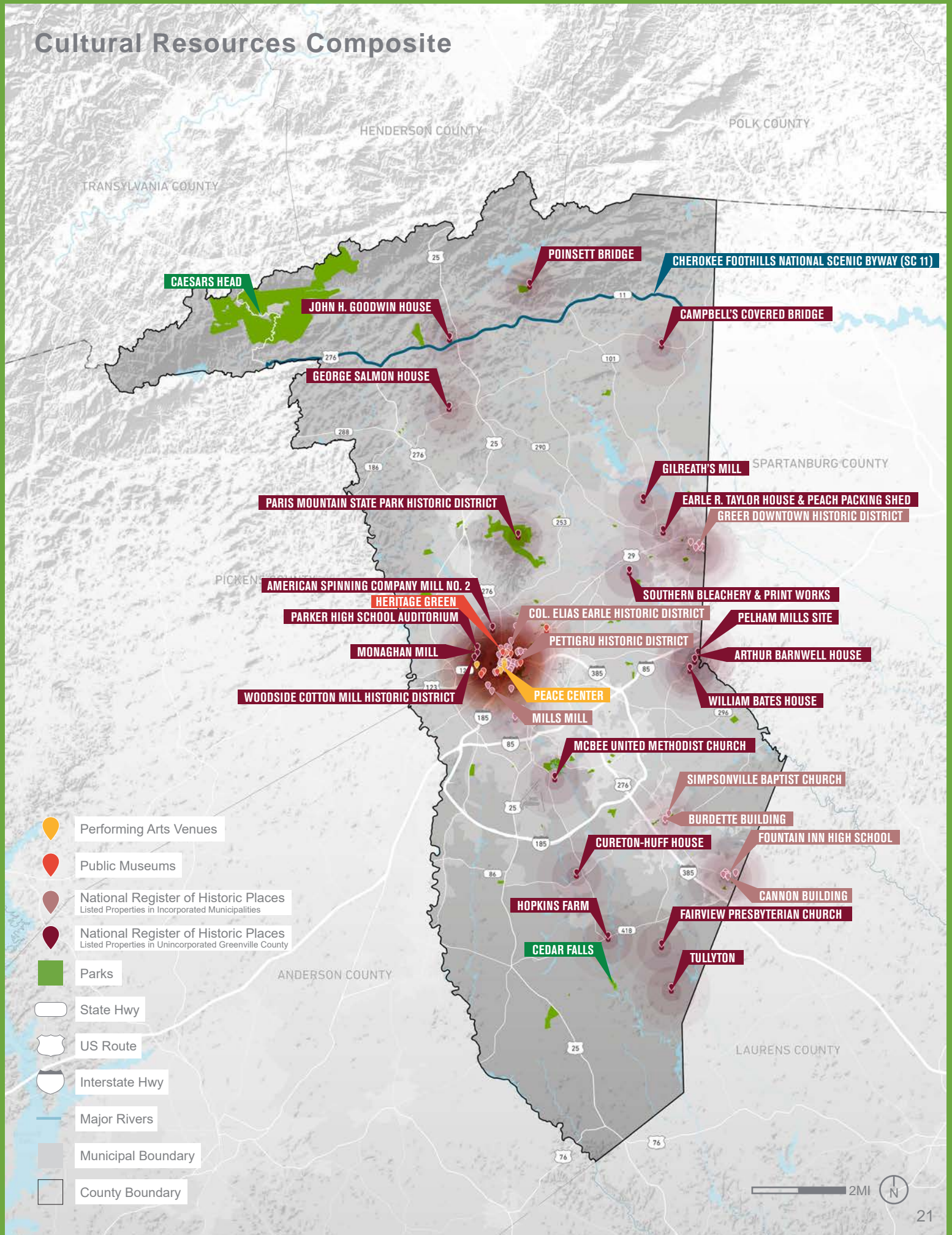
Given its abundance of natural areas, there are many scenic sites throughout Greenville County. The Cherokee Foothills National Scenic Byway traverses the northern part of Greenville County and is adjacent to several historic sites, such as the Poinsett Bridge and Campbell's Covered Bridge.

Culture, Arts, and Entertainment

Greenville County is home to a number of important cultural, arts, and entertainment assets, many of which are located in the City of Greenville.

Heritage Green, located in the City of Greenville, is a cultural campus that contains the Greenville County Museum of Art, Greenville Theatre, Upcountry History Museum, the Children's Museum of the Upstate, and Hughes Main Library.

Cultural Resources Composite



1786 » GREENVILLE COUNTY ESTABLISHED

1869 » CITY OF GREENVILLE ESTABLISHED

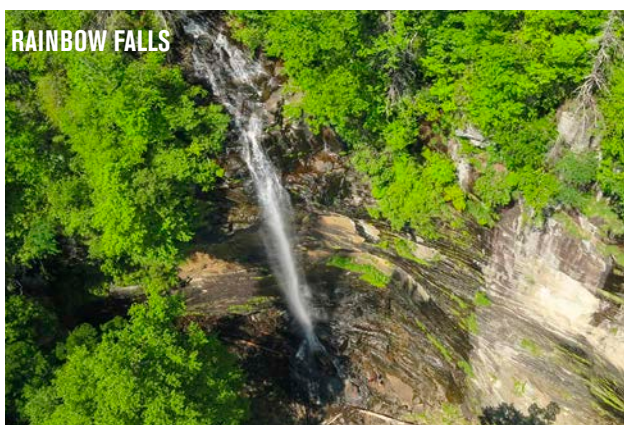
1876 » GREER INCORPORATED

1886 » FOUNTAIN INN INCORPORATED

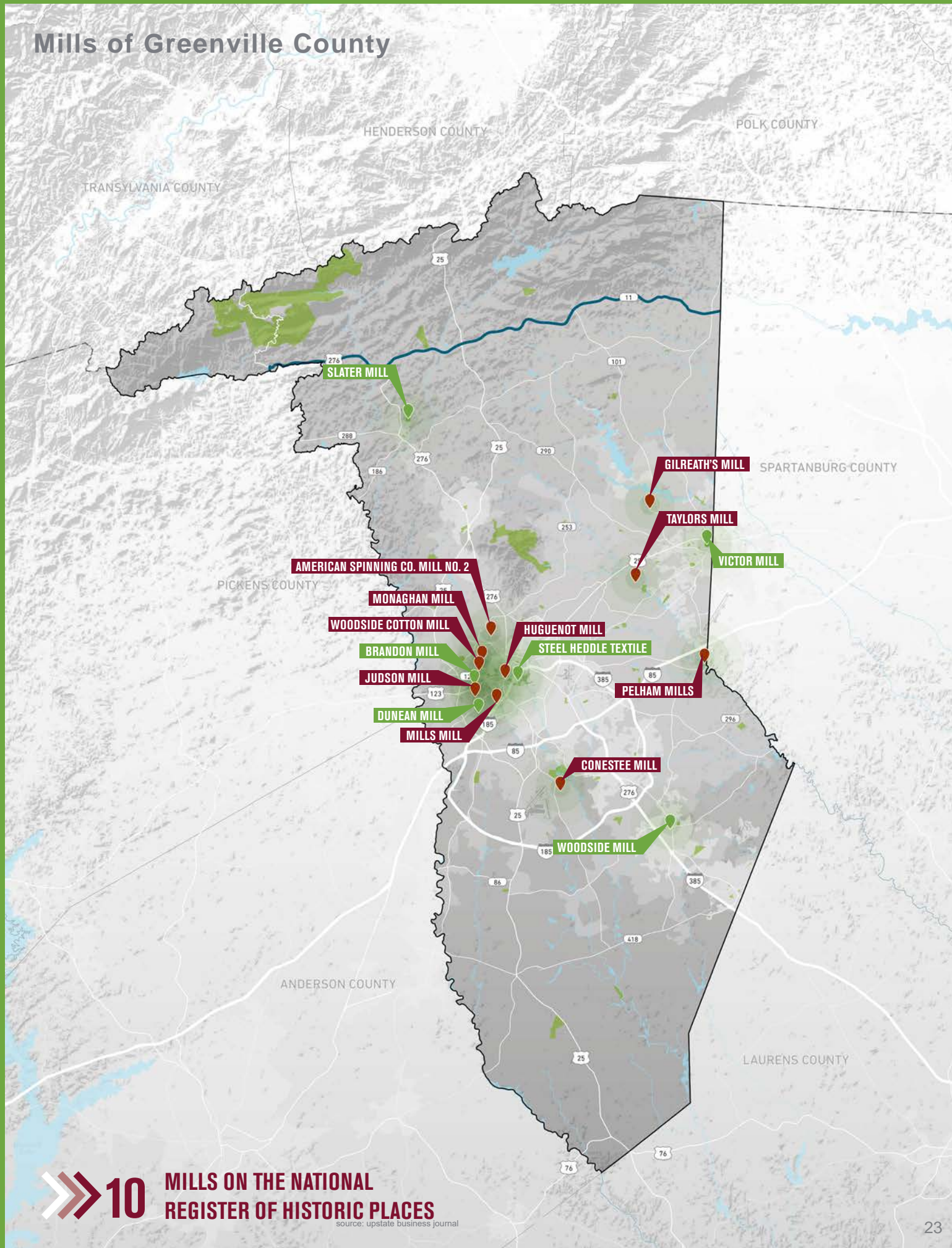
1891 » TRAVELERS REST INCORPORATED

1901 » SIMPSONVILLE INCORPORATED

1960 » MAULDIN INCORPORATED



Mills of Greenville County



**10 MILLS ON THE NATIONAL
REGISTER OF HISTORIC PLACES**

source: upstate business journal

Serve

Community Facilities Element

Educational Institutions

Greenville County is home to numerous educational facilities, from K-12 schools to technical schools, colleges, and universities that serve a large local and regional population.

The Greenville County School District is the 44th largest school district in the U.S., with 101 schools and learning centers. In 2018, the Greenville County School District employed 10,095 teachers, administrators, and support staff and served 76,591 students.

Greenville Tech is a technical college with eight locations in the county and several two- and four-year degree options.

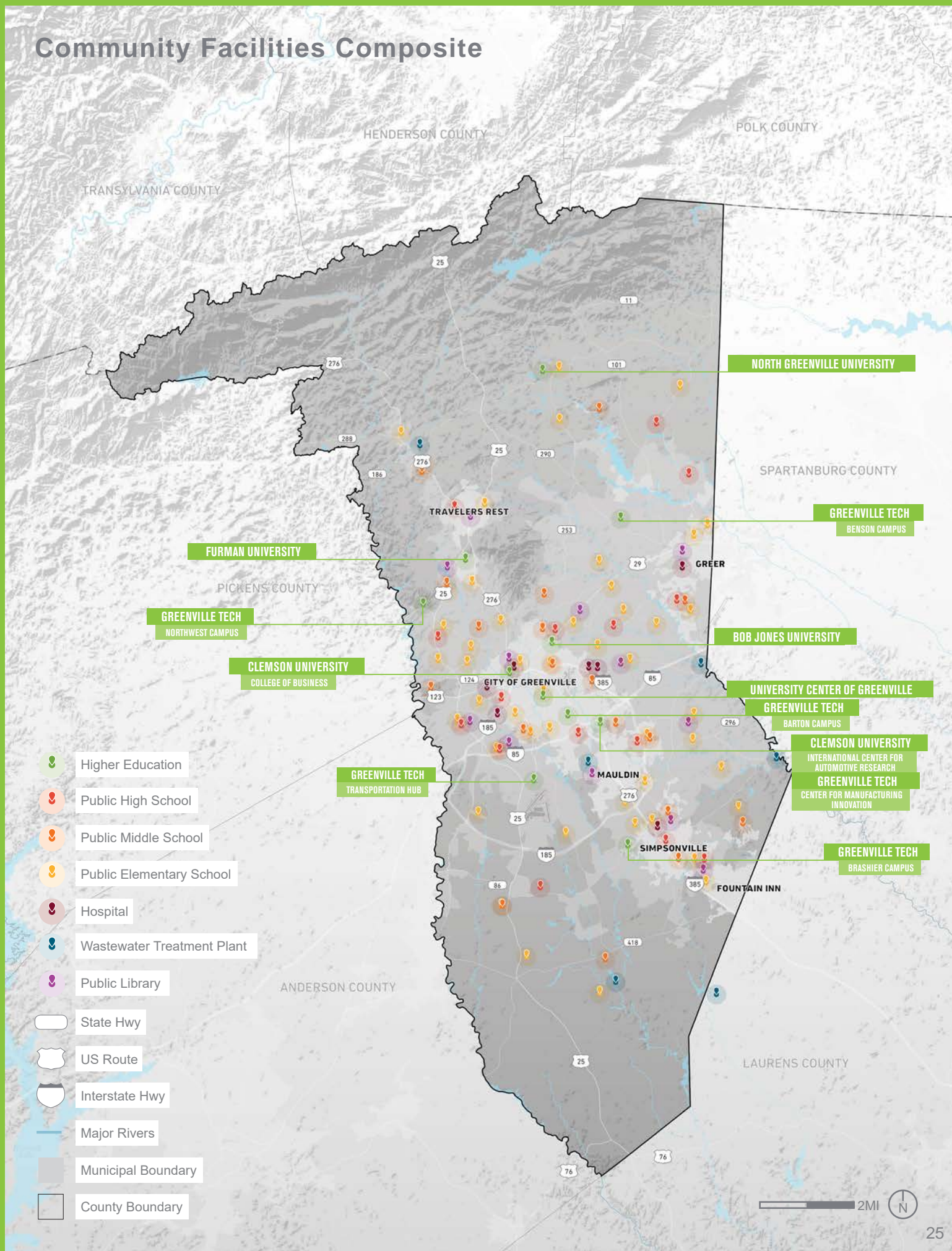
The other major public and private higher education institutions in the county are Clemson University (Downtown Greenville Campus), Furman University, University Center Greenville, and North Greenville University.

Public Services and Utilities

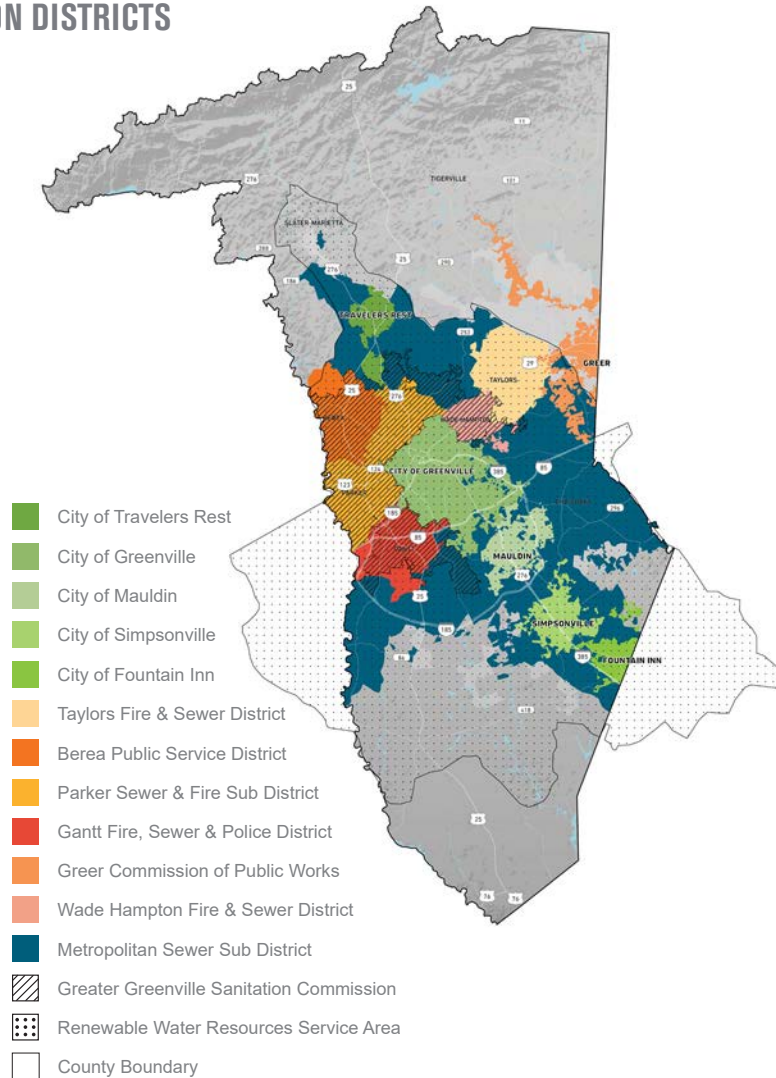
In 2019, there are 29 Special Purpose Districts that include water, fire, sewer, waste collection, and other public service districts. Excluding the incorporated municipalities, Greenville County is home to nine sewer and sanitation districts that cover a majority of the urbanized part of the county.

The Greenville County Library System includes twelve locations across the county, with 1.62 million patrons visiting system locations in 2017.

Community Facilities Composite



SEWER & SANITATION DISTRICTS



29

SPECIAL PURPOSE DISTRICTS IN GREENVILLE COUNTY

“A Special Purpose District is a district created by an Act of the South Carolina General Assembly or pursuant to general law, which provides any governmental power or function including, but not limited to, fire protection, sewage treatment, water or natural gas distribution or recreation. A Special Purpose District also means any rural community water district authorized or created under the provisions of Chapter 13 of Title 6 of the South Carolina Code. Special Purpose Districts do not include any state agency, department, commission, or school district.”

Source: South Carolina Special Purpose Districts 2016 Biennial Directory

GREENVILLE COUNTY SCHOOLS



44TH

LARGEST DISTRICT IN THE NATION



101

SCHOOLS & CENTERS



76,591

STUDENTS

10,095

EMPLOYEES



86.8%

GRADUATION RATE (20% INCREASE SINCE 2012)

GREENVILLE COUNTY LIBRARIES



1.62 MILLION

PEOPLE VISITED A LIBRARY IN 2017



283,056

INDIVIDUALS ARE REGISTERED BORROWERS



12 LOCATIONS

ACROSS GREENVILLE COUNTY & 1 BOOKMOBILE



3.29 MILLION

ITEMS WERE BORROWED SYSTEM WIDE IN 2017

Live

Housing Element

Housing Characteristics

In 2019, most existing housing units in Greenville County are single-family detached (67%), with multi-family (20%), mobile homes (9%), single-family attached (4%) comprising the balance of the county inventory.

Between 2010 and 2018, the number of owner-occupied units in Greenville County decreased, while the number of rental units increased slightly.

According to a 2016 affordable housing study, the median home value in Greenville County in 2016 was \$165,900, while the median monthly rent was \$798. The highest-value areas were in and around the City of Greenville and the county's east side.

Housing Trends

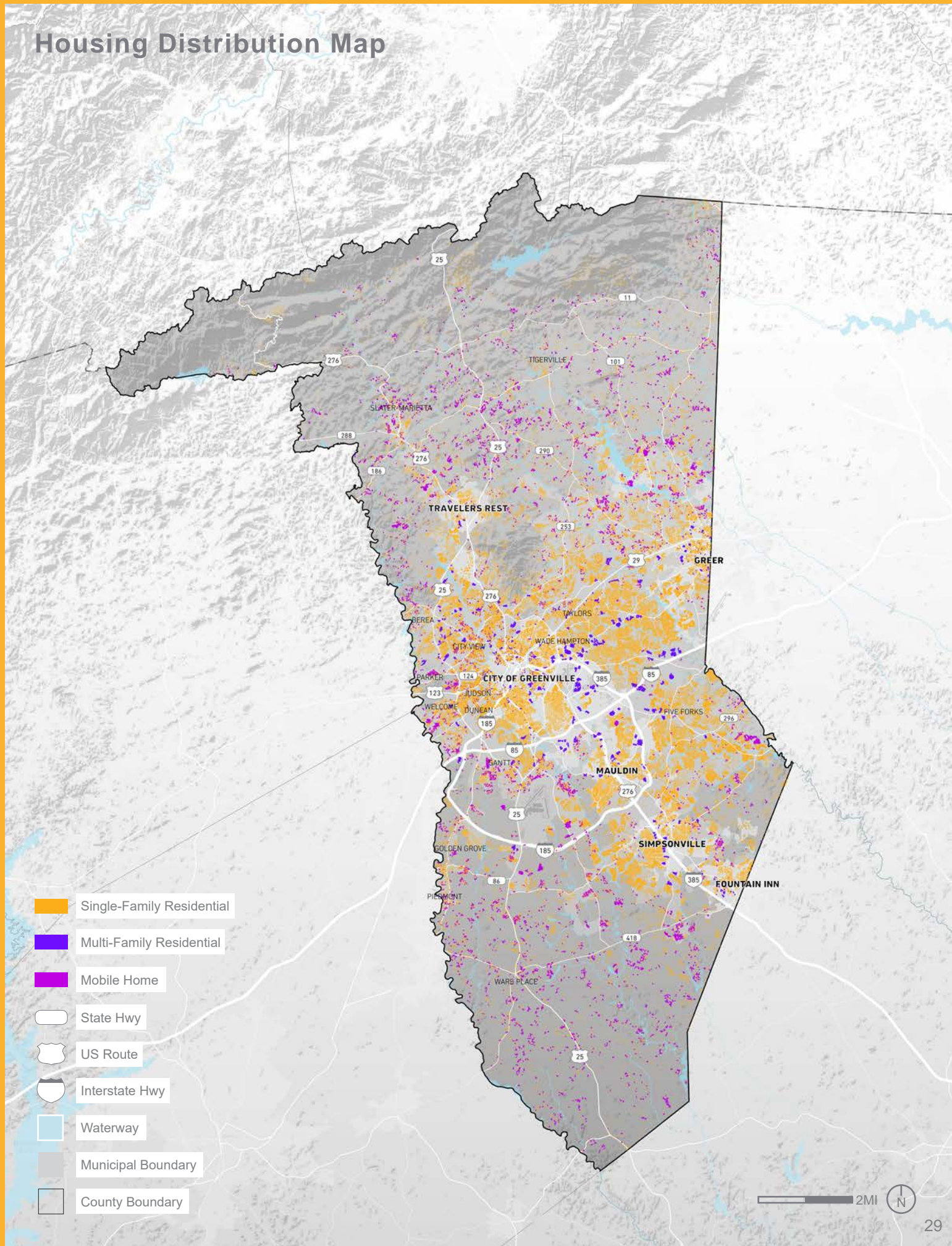
From 2010 to 2017, Greenville County experienced a 1.1% annual growth rate in new housing units.

Housing sales prices have also increased in recent years. The median sale price of a single-family home increased almost 16% from \$196,000 in 2016 to \$227,000 in 2018. During these same years, the median sales prices for condominiums and townhomes also increased.

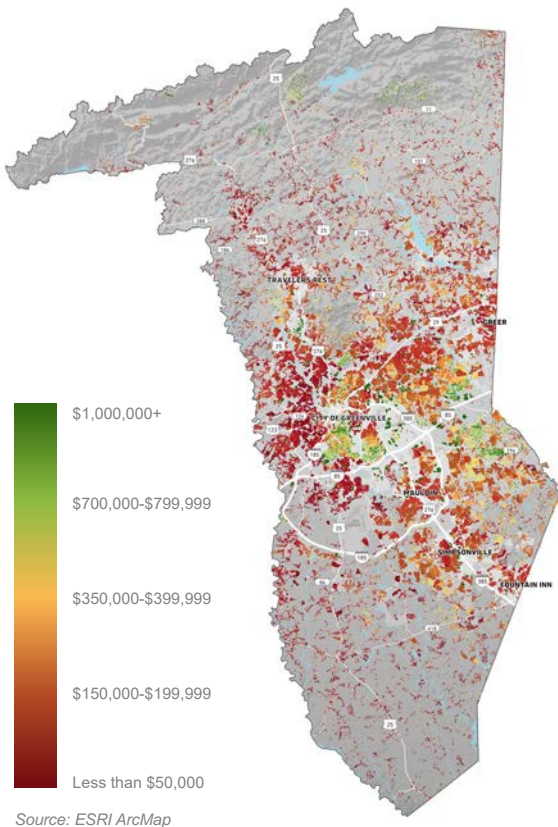
This sales price growth does not necessarily benefit all county residents. In 2016, 34% of county households had difficulty finding affordable housing and 21,974 households were cost-burdened.

Housing Distribution Map

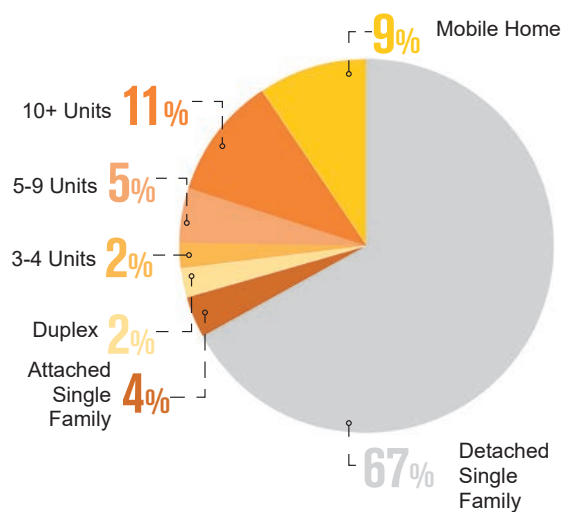
- Single-Family Residential
- Multi-Family Residential
- Mobile Home
- State Hwy
- US Route
- Interstate Hwy
- Waterway
- Municipal Boundary
- County Boundary



2018 MEDIAN HOUSING VALUES



HOUSING TYPES



20% OF HOUSING IN GREENVILLE COUNTY IS MULTI-FAMILY

Source: ESRI

AFFORDABILITY



\$165,900

MEDIAN HOME VALUE (2016)



\$53,633 - Estimated income needed to afford a house



\$798

MEDIAN MONTHLY RENT (2016)



\$28,748 - Estimated income needed to rent



21,974

TOTAL NUMBER OF COST-BURDENED HOUSEHOLDS (2016)

Households with an annual income <\$20,000

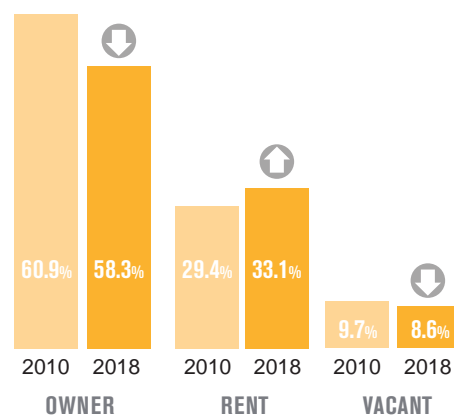


34%

OF HOUSEHOLDS IN GREENVILLE COUNTY HAVE DIFFICULTY OBTAINING AFFORDABLE HOUSING

Source: "Greenville County, South Carolina Affordable Housing Study," Greenville County Redevelopment Authority

HOUSING OCCUPANCY



GROWTH



+1.10%

ANNUAL GROWTH IN HOUSING UNITS IN GREENVILLE COUNTY (2010-2017)

Source: U.S. Census Bureau

Single Family Home Sales (2016-2018)

YEAR	MEDIAN SALE PRICE
2018	\$227,000
2017	\$208,000
2016	\$196,000

YEAR	SALE PRICE / SQ FT
2018	\$113
2017	\$106
2016	\$101

Source: "Market Data Report," Greater Greenville Association of REALTORS

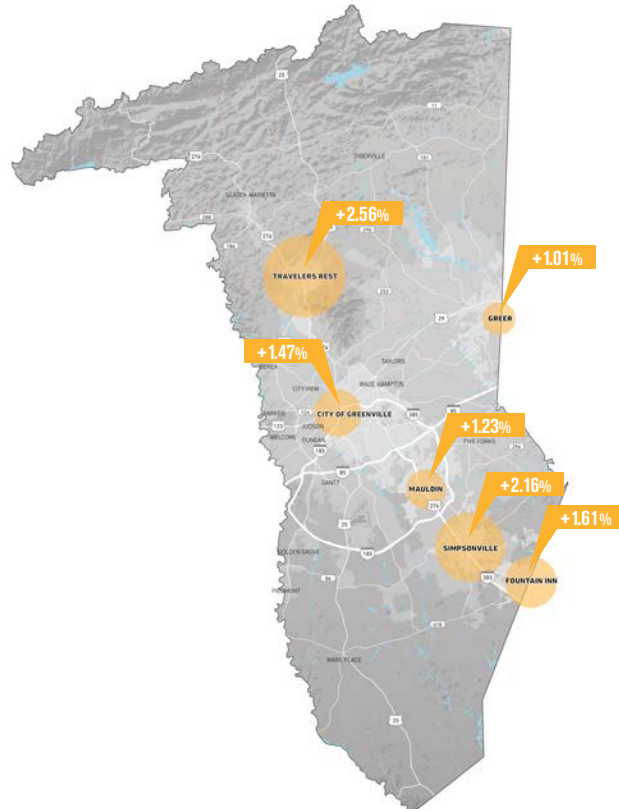
Condo/Townhouse Sales (2016-2018)

YEAR	MEDIAN SALE PRICE
2018	\$208,453
2017	\$192,525
2016	\$183,000

YEAR	# UNITS SOLD
2018	13,333
2017	12,598
2016	12,198

Source: Greater Greenville Association of REALTORS

Annual Housing Unit Growth Rate in Cities (2010-2017)



Source: U.S. Census Bureau

THE MISSING MIDDLE



"Missing Middle" housing is range of multi-unit or clustered housing types compatible and in scale with single-family homes that can help meet the growing demand for walkable urban living.

Source: missingmiddlehousing.com

Balance

Land Use Element

Zoning

The majority of northern and southern Greenville County are currently unzoned. These unzoned areas feature a significant amount of agricultural land, natural areas, and open space. Development is changing the land uses in these unzoned areas, as residential and commercial development continues throughout the northern and southern thirds of Greenville County.

Land Use Characteristics

There are several major land uses that can be found throughout Greenville County. Residential land use varies in typology from walkable, urban neighborhoods and auto-centric suburbs to large-lot residential and mobile home communities.

Residential subdivision approvals in Greenville County have been increasing since the 1960s, with a boom of almost 1,500 acres of land subdivisions approved between 2000-2010. Since 2010, development has become more compact, with 440 acres of land subdivisions approved between 2010-2017.

The majority of commercial land uses are located in the incorporated cities and urbanized areas of unincorporated Greenville County.

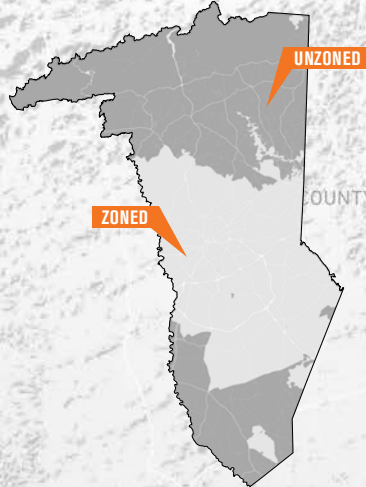
Industrial uses in Greenville County are mostly warehouse or logistics facilities found in suburban and exurban areas.

Agricultural land is predominantly found outside of the urban areas in the northern and southern thirds of Greenville County.

Industrial uses bring in the highest tax rate at 10.5%, while commercial and residential uses bring in 6% and 4%, respectively.

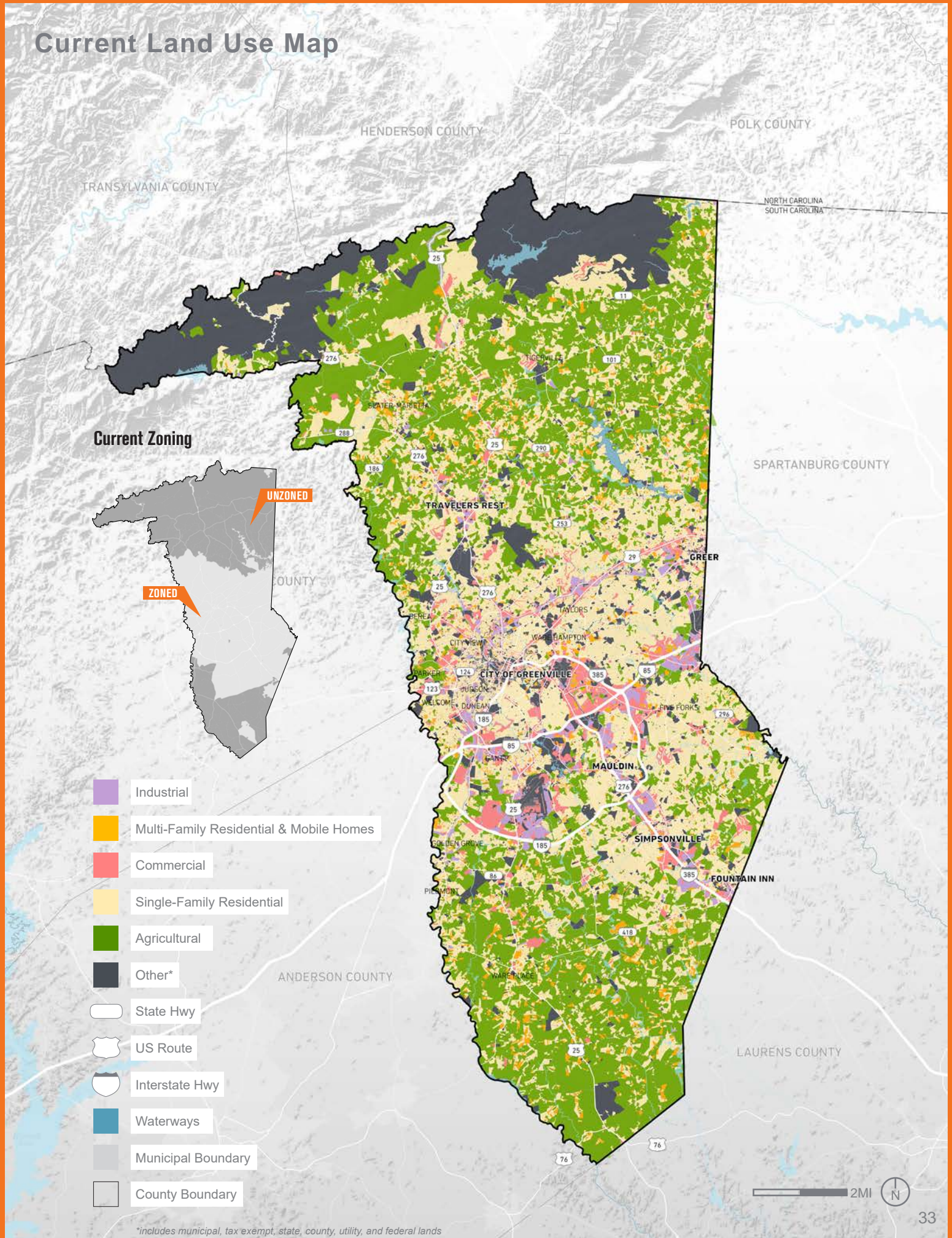
Current Land Use Map

Current Zoning



- Industrial
- Multi-Family Residential & Mobile Homes
- Commercial
- Single-Family Residential
- Agricultural
- Other*
- State Hwy
- US Route
- Interstate Hwy
- Waterways
- Municipal Boundary
- County Boundary

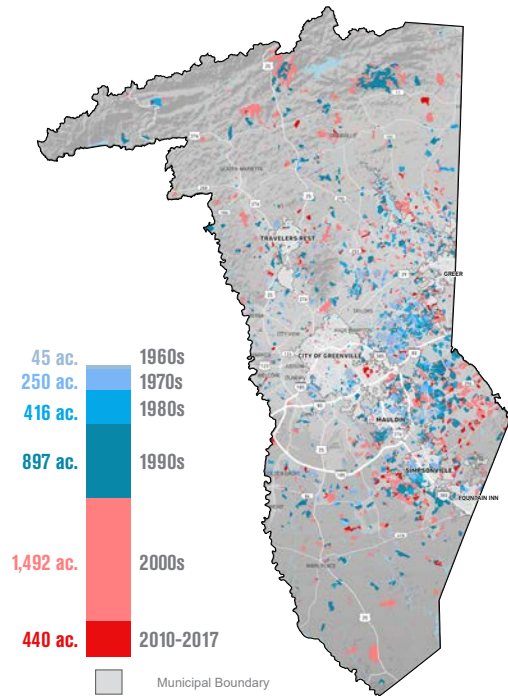
*includes municipal, tax exempt, state, county, utility, and federal lands





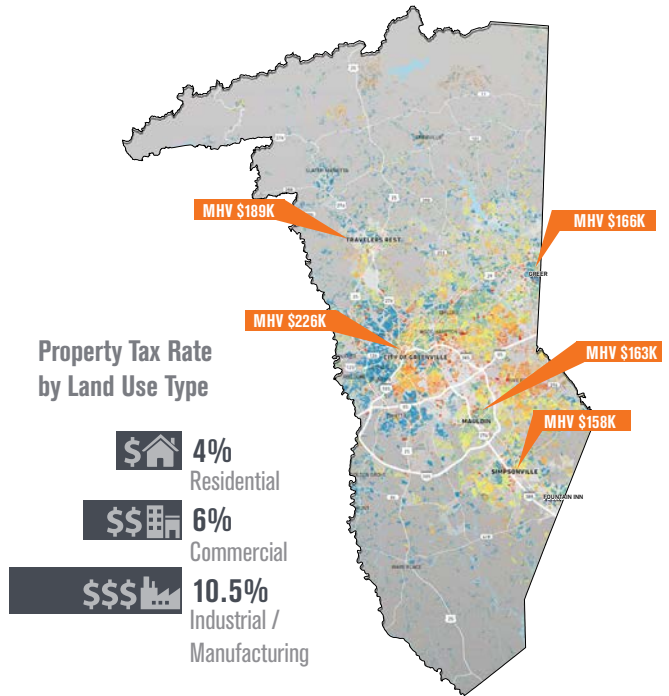
SUBDIVISION APPROVALS, 1960-2017

Note: Municipal Boundaries last updated in 2017

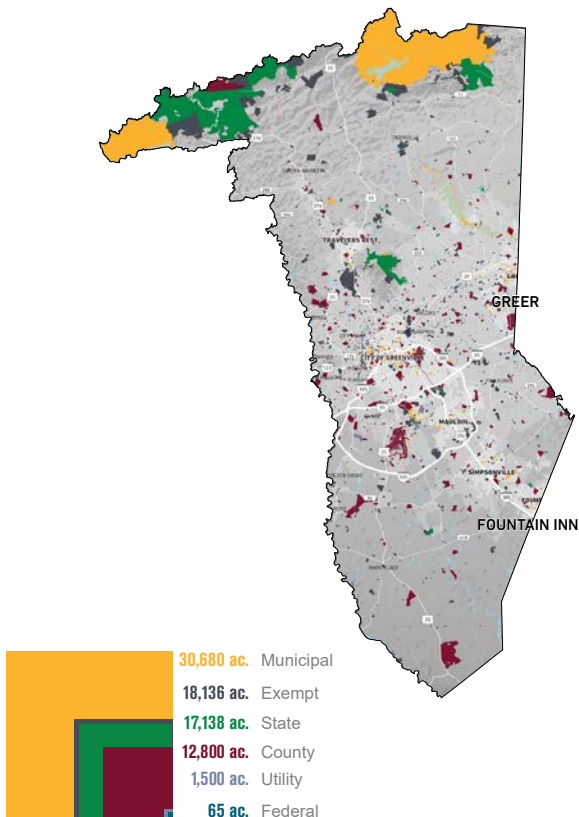


TAXABLE MARKET VALUE

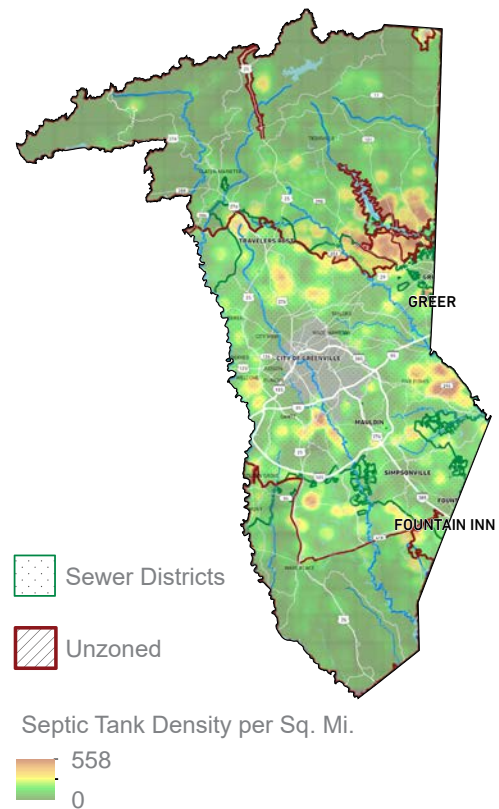
LOWER [\$] HIGHER [\$\$\$\$]
MHV = Median Home Value



PUBLIC LANDS



SEPTIC TANKS



Move

Transportation Element

Trip Characteristics

Driving a private vehicle is the most common mode for commuting to work. An overwhelming majority of workers in Greenville County (88%) drive alone to work, while 8.8% carpool. Driving is also a relatively time-efficient mode for traveling to work, with 72% of employees commuting for less than 30 minutes.

Alternative Transportation

The Greenlink transit system, operated by the City of Greenville, provides eleven bus routes and five trolley routes to destinations within the City of Greenville and adjacent unincorporated urbanized areas. Greenlink also offers a paratransit service to people who are unable to utilize the fixed routes due to a disability.

The Swamp Rabbit Trail provides an active transportation route from Travelers Rest to Downtown Greenville and adjacent areas.

Additionally, Greyhound and Amtrak offer regional bus and passenger rail service in Greenville County.

Freight and Cargo

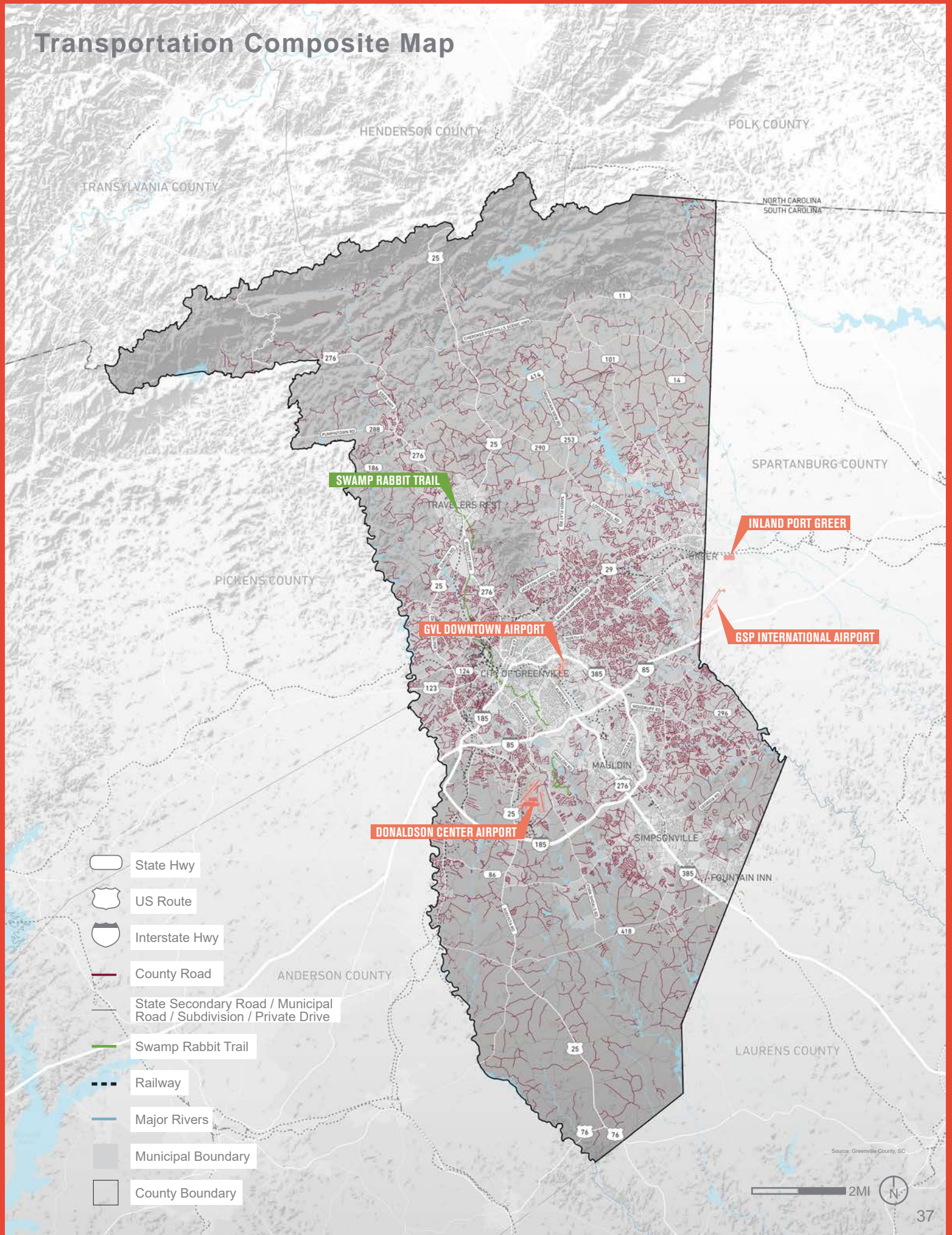
There are several modes through which freight and cargo are transported throughout Greenville County.

In 2017, Greenville-Spartanburg International Airport transported 49,365 tons of cargo, which was up 101% from 24,668 in 2010. Donaldson Airport SCTAC also transports cargo into and out of Greenville County.

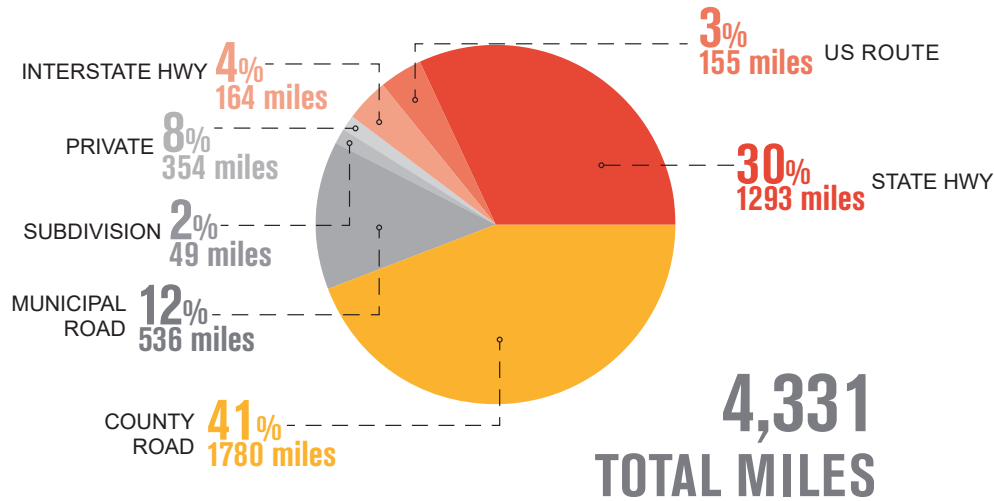
The Inland Port Greer (which is located just across the county line in Spartanburg County) has been a pivotal project for moving cargo in Greenville County, as it extended the Port of Charleston's reach inland to access more than 95 million consumers within a day's drive.

Additionally, there are about 155 miles of designated freight routes and about 115 miles of railways in the county that also contribute to the movement of freight throughout Greenville County.

Transportation Composite Map



ROAD CLASSIFICATION



RAIL AND FREIGHT



AIRPORTS & INLAND PORT

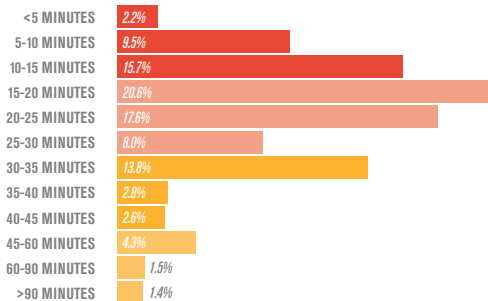


"INLAND PORT GREER OPENED IN OCTOBER 2013, EXTENDING THE PORT OF CHARLESTON'S REACH 212 MILES INLAND TO GREER, S.C., AND PROVIDING SHIPPERS WITH ACCESS TO MORE THAN 95 MILLION CONSUMERS WITHIN A ONE-DAY DRIVE."

Source: South Carolina Ports Website

COMMUTE & MODE SPLIT

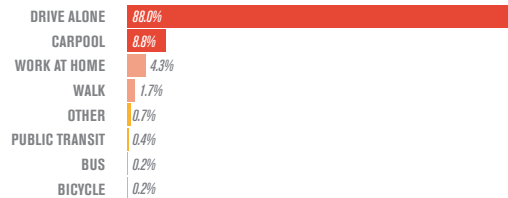
AVERAGE COMMUTE TIME



Source: U.S. Census American Community Survey via Esri

72% OF EMPLOYEES IN GREENVILLE COUNTY
COMMUTE TO WORK IN UNDER 30 MINUTES

HOW PEOPLE GET TO WORK

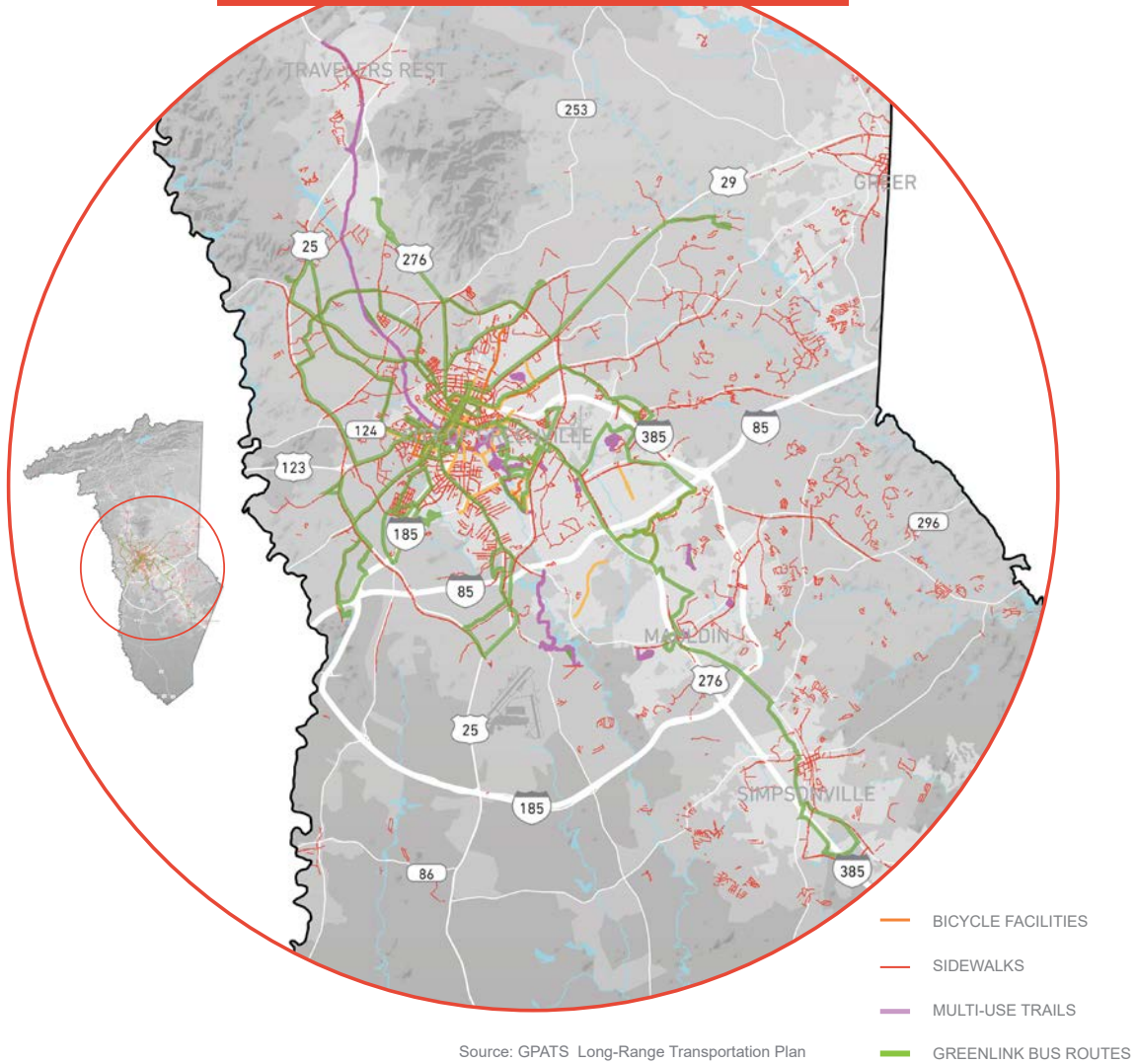


Source: U.S. Census American Community Survey via Esri

97% OF EMPLOYEES IN GREENVILLE COUNTY
DRIVE ALONE OR CARPOOL TO WORK

EXISTING BICYCLE & PEDESTRIAN INFRASTRUCTURE & GREENLINK BUS ROUTE

GREENLINK PROVIDES **11** BUS ROUTES & **5** TROLLEY ROUTES





03 | peer county comparison

This section provides a comparison of selected peer counties within South Carolina and across the Southeast. The metrics that form the basis of this comparison will become more relevant later in the planning process, when lessons can be learned from these places, many of which have confronted similar challenges and opportunities through planning, partnership, and policy-based solutions.

South Carolina Counties

Population

Within South Carolina, Greenville County's peers include Spartanburg County, Richland County, and Charleston County.

Greenville County has experienced a population growth increase of 14% since 2010, which is equal to that of Charleston County and significantly higher than Spartanburg County and Richland County.

Compared to its peers, Greenville County has the largest average household size of 2.58 people.

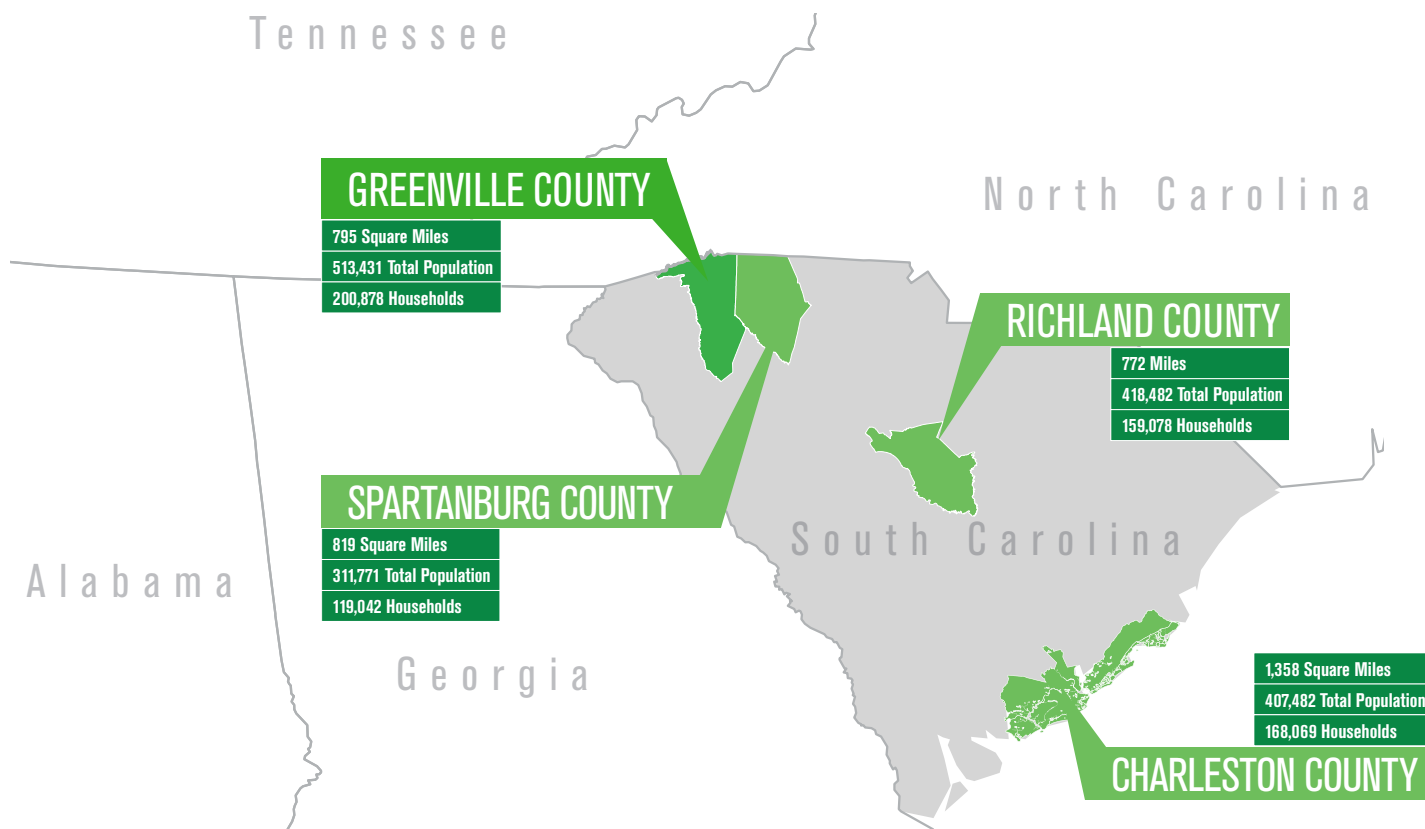
Housing

Of the four counties, Greenville County has the third-highest median home value. Charleston County has the highest figure at \$273,477, which is significantly higher than all other counties.

Education & Employment

Greenville County has the third-highest percentage of people with a graduate or professional degree at 11.3% and 31% with an associate or bachelor degree.

Greenville County has the third-highest share of white collar employment, the second-highest share of blue collar employment, and is tied for the lowest share of service industry employment.



	GREENVILLE COUNTY	SPARTANBURG COUNTY	RICHLAND COUNTY	CHARLESTON COUNTY
POPULATION GROWTH <small>(since 2010)</small>	14%	9%	8%	14%
MEDIAN HOUSEHOLD INCOME 	\$53,739	\$49,047	\$54,603	\$56,939
AVERAGE HOUSEHOLD SIZE 	2.58	2.55	2.43	2.36
OWNERSHIP 	 66% 34%	 69% 31%	 59% 41%	 61% 39%
VACANCY RATE 	1.6% 6.5% homeowner vacancy rental vacancy	2% 5.7% homeowner vacancy rental vacancy	2.5% 8% homeowner vacancy rental vacancy	2.5% 9.6% homeowner vacancy rental vacancy
MEDIAN AGE 	38.6	39.3	34.2	37.5
EMPLOYMENT 	62% 22% 16% WHITE COLLAR BLUE COLLAR SERVICES	55% 29% 16% WHITE COLLAR BLUE COLLAR SERVICES	66% 15% 19% WHITE COLLAR BLUE COLLAR SERVICES	63% 18% 19% WHITE COLLAR BLUE COLLAR SERVICES
MEDIAN HOME VALUE 	\$165,900	\$139,811	\$172,671	\$273,477
EDUCATION ATTAINMENT 	11% 31% 58% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	9% 26% 65% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	15% 32% 53% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	15% 36% 49% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS

Regional Counties

Population

At a regional level, Greenville County is the most populous of its peer counties, which include Hamilton County, Tennessee; Knox County, Tennessee; Madison County, Alabama; Forsyth County, North Carolina; and Guilford County, North Carolina.

Among these peers, Greenville County has the highest population growth at 14%, a figure which is significantly higher than all other counties.

Income

Greenville County has the second-highest median household income of the group. Madison County, Alabama, the highest, has a median household income nearly \$10,000 more than Greenville County. (This high number is due to the high concentration of aerospace and defense-related industries located in the Huntsville metro area.)

Housing

Of its regional peers, Greenville County has the lowest median home value at \$165,900. Hamilton County, Tennessee has the highest median home value at \$185,090. Greenville County has the lowest homeowner vacancy rate at 1.6%.

Education & Employment

Compared to its regional peers, Greenville County has the lowest percentage of population with a graduate or professional degree at 11.3%. Greenville County's employment mix is relatively similar to peer these counties, although it has the highest percentage of blue-collar workers in the group.

576 Square Miles
367,367 Total Population
148,058 Households

HAMILTON COUNTY

Tennessee

413 Square Miles
378,496 Total Population
151,655 Households

FORSYTH COUNTY

658 Square Miles
527,708 Total Population
211,168 Households

GUILFORD COUNTY

KNOX COUNTY

526 Square Miles
465,546 Total Population
190,681 Households

451 Square Miles
367,309 Total Population
149,214 Households

MADISON COUNTY

795 Square Miles
513,431 Total Population
200,878 Households



















































GREENVILLE COUNTY

North Carolina

South Carolina

Alabama

Georgia

	HAMILTON COUNTY	KNOX COUNTY	FORSYTH COUNTY	GUILFORD COUNTY	MADISON COUNTY
POPULATION GROWTH (since 2010)	 8%	 7%	 7%	 7%	 9%
MEDIAN HOUSEHOLD INCOME	 \$51,711	 \$52,699	 \$51,640	 \$51,228	 \$63,240
AVERAGE HOUSEHOLD SIZE	 2.42	 2.38	 2.43	 2.42	 2.41
OWNERSHIP	 65%  35%	 64%  36%	 62%  38%	 59%  41%	 68%  32%
VACANCY RATE	 1.9% 9.1% homeowner vacancy rental vacancy	 1.9% 5.5% homeowner vacancy rental vacancy	 2.3% 10.2% homeowner vacancy rental vacancy	 1.7% 8.8% homeowner vacancy rental vacancy	 1.9% 7.8% homeowner vacancy rental vacancy
MEDIAN AGE	 40.8	 38.9	 38.6	 37.6	 38.7
EMPLOYMENT	 61% 21% 18% WHITE COLLAR BLUE COLLAR SERVICES	 66% 17% 17% WHITE COLLAR BLUE COLLAR SERVICES	 62% 20% 18% WHITE COLLAR BLUE COLLAR SERVICES	 63% 20% 17% WHITE COLLAR BLUE COLLAR SERVICES	 67% 17% 16% WHITE COLLAR BLUE COLLAR SERVICES
MEDIAN HOME VALUE	 \$185,090	 \$193,591	 \$168,235	 \$178,939	 \$183,308
EDUCATION ATTAINMENT	 11% 29% 60% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	 14% 32% 54% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	 14% 31% 48% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	 13% 32% 55% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS	 16% 34% 50% GRADUATE/PROFESSIONAL ASSOCIATE OR BACHELOR HIGH SCHOOL OR LESS



04 | community engagement

This section details the community engagement efforts and outcomes from Phase 1 meetings for *Plan Greenville County*. The planning process will include future rounds of community meetings and engagement efforts. Therefore, this section demonstrates and details the work-to-date that the Project Team and county staff have undertaken between January and March 2019.

Stakeholder Roundtables

On January 16-17, 2019, the Planning Team conducted a series of small group interviews with 100 key county, district, and community stakeholders. The stakeholder discussions were organized based on the nine required elements of a comprehensive plan.

Overall Observations

- Greenville County's population and jobs are growing. Where should growth occur and what type? New development needs to respond to the context of various communities.
- There is a strong interrelationship of water, sewer, transportation, and land development. New development is directly related to the provision and capacity of infrastructure.
- Special Purpose Districts are impacting growth within the county. There is interest in consolidation to make the process more efficient, intuitive, and effective.
- Zoning and Subdivision Regulations (plus DHEC requirements) are the legal mechanisms for reviewing and shaping individual development. Today, the Comprehensive Plan, Zoning, and Subdivision Regulations do not coordinate well with each other.
- Two-thirds of the county is unzoned. This creates a challenge for guiding and shaping development within the county.
- Sewer service is a critical issue within the county. Multiple providers and end-of-pipe processing with different jurisdictions/interests is a major issue.
- Septic systems are heavily used throughout the county. This creates a series of long-term health, safety, and wellness issues - and costs - for the county.
- Water quality is a major concern within the county. Stormwater is being addressed, but water quality efforts are lagging behind. Septic systems are one of the major issues. Clean streams and rivers would benefit all.
- The county's transportation system is struggling to keep pace with the growth of past decades. Existing transportation improvements throughout the county are needed and strongly desired by the community.
- There is a growing economic divide in the county between those who are struggling and those who are well-off and have high service expectations. This has ramifications on many issues within the county.
- "Missing Middle" housing is a concern here, as it is nationally. The community conversation has been started and there is strong interest in how to address it.
- Economic development continues to be critical within the county to balance land uses and tax base. While employment growth has been strong the past two decades, there is a lack of development-ready industrial/employment sites within Greenville County.
- Mill villages are important to the heritage of the county and those living here. There is a need to continue to preserve and enhance them as part of the county's identity.
- Cities are growing. Their growth needs to be coordinated and directed within the county. This also means coordination between jurisdictions and development-review efforts, particularly at the city fringes.
- County-wide champions are important. There are many organizations that do a good job of representing various interest groups or communities, but there is room for improvement for consistent county-level leadership.
- Public-private partnerships are critical to addressing tough, long-standing, intractable issues. There is a need to build on existing partnerships and examples from other communities.

Community Workshops

In February 2019, the Project Team conducted a series of nine community meetings throughout Greenville County. The meetings took place at strategically-selected locations between five and eight o'clock in the evening to reach as many residents as possible across the county:

- Travelers Rest High School (Feb. 4)
- Eastside High School (Feb. 7)
- Bells Crossing Elementary School (Feb. 11)
- Woodmont High School (Feb. 12)
- Berea High School (Feb. 14)
- Greenville County Square (Feb. 21; all-day open house)
- Blue Ridge High School (Feb. 25)
- Ralph Chandler Middle School (Feb. 26)
- Mt. Pleasant Community Center (Feb. 28)

A total of 584 residents attended these meetings and provided over 3,400 comments. Additionally, an online version of the meeting content was made available to the general public to give additional feedback.

During each meeting, the public was invited to participate in eight topic stations:

- *Grow - Population Element*
- *Work - Economic Development Element*
- *Preserve - Natural Resource Element*
- *Enrich - Cultural Resource Element*
- *Serve - Community Facility Element*
- *Live - Housing Element*
- *Balance - Land Use Element*
- *Move - Transportation Element*

At each station, the Project Team posed questions based on map displays, charts, infographics, and one-on-one conversations. The comments gathered at this meeting were then compiled and summarized in the following pages.



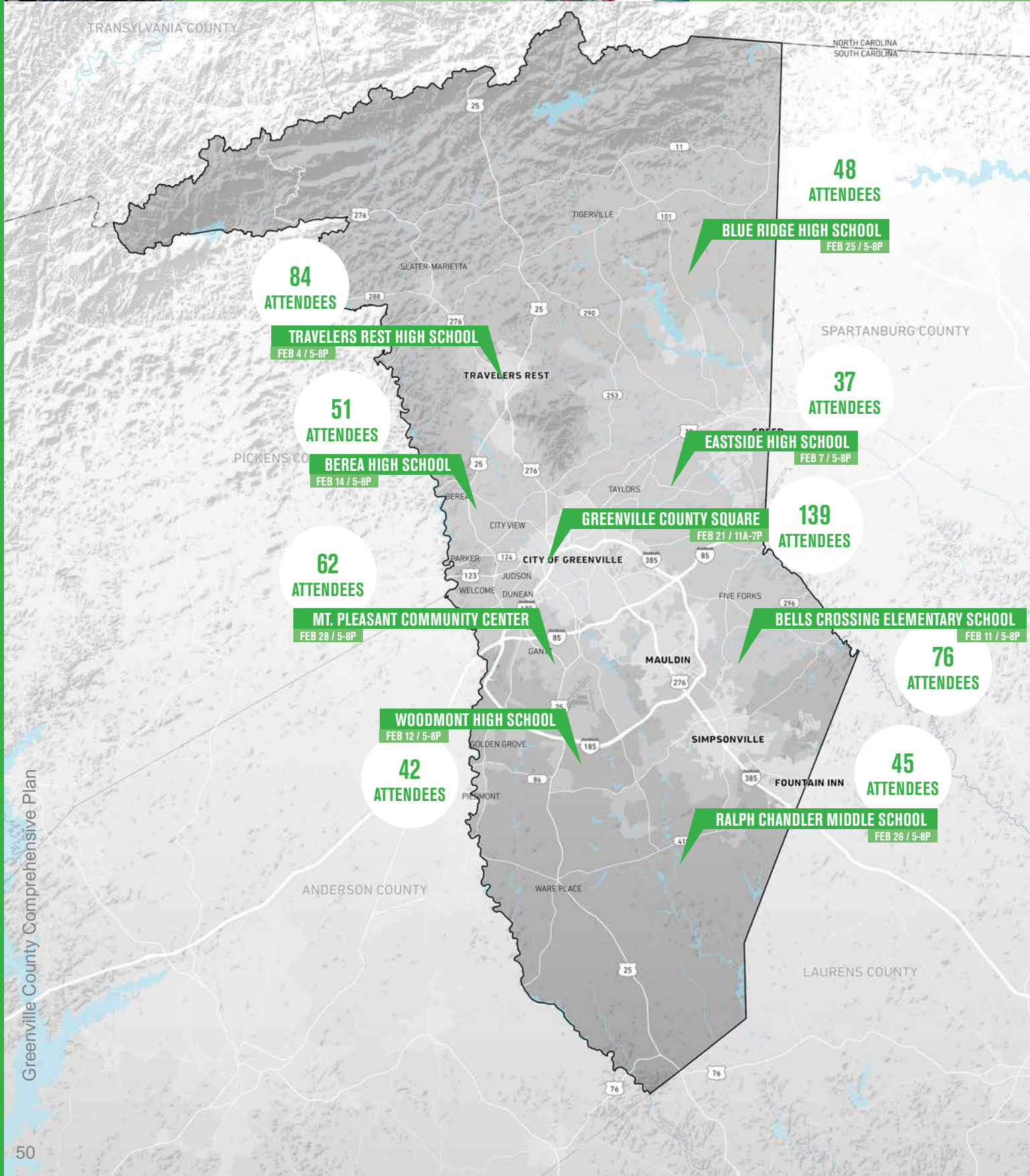
9
MEETINGS

584
ATTENDEES



3,410
COMMENTS

7,117
PAGE VIEWS



THEME	COMMUNITY INPUT
GROW Population (355 comments)	<ul style="list-style-type: none"> • Provide attainable, affordable housing. Be cognizant of our aging population and all the services required to support them. • Promote transportation improvements that result in increased connectivity and walkability as well as better connections to jobs. • Focus growth along primary corridors and transit routes when considering available or planned infrastructure. • Foster community character and identity with context-based development.
WORK Economic Development (294 comments)	<ul style="list-style-type: none"> • Focus on attracting high-tech, manufacturing and light-manufacturing industries. • Strengthen our green technology, trade, healthcare, and education industries. • Promote physical access to jobs through an improved transportation system. • Invest in job training programs for a skilled workforce. • Focus on livable wages and quality, affordable childcare for working families.
PRESERVE Natural Resources (649 comments)	<ul style="list-style-type: none"> • Protect and preserve waterways, mountains, parks, and green spaces. Preserve farmland, viewsheds, buffers, native species and fight invasive species. • Most-cited favorite places are Paris Mountain State Park, Cedar Falls Park, Conestee Park, the Swamp Rabbit Trail, and Caesars Head. • Support policies to protect the environment and increase green space; include sustainable development and green infrastructure. • Hold developers accountable to protect, preserve, and increase the amount of trees and green spaces.
ENRICH Cultural Resources (367 comments)	<ul style="list-style-type: none"> • Most-cited cultural resources are natural features, arts and culture facilities (museums, theaters, libraries, community centers), and history and historic sites (mills and textile history, cemeteries). • Promote preservation through redevelopment. • Find a balance between development opportunities and natural resources and tree canopy. • Better showcase African-American and other minority history and community contributions.

"Plan for transportation before you grow any areas; both public transportation and good-flowing traffic on roads that are becoming over-burdened."

"Continue to grow manufacturing jobs and do more to nurture the high-tech industry here - telecoms, IT, software development; Telecoms are almost entirely in Atlanta and Charlotte currently. Attract the telecom employees here!"

"The most important natural resources to protect are waterways, state parks, trees in urban areas, and trees and vegetation along medians in the road."

"Preserve our historic sites. Don't sacrifice them to developers."

"Historic cultural resources are important. There should be public-private cooperation to protect them."

THEME	COMMUNITY INPUT
SERVE Community Facilities (372 comments)	<ul style="list-style-type: none"> • Improve recycling services, social services, and transportation services. • Note code enforcement, public safety, transportation, school resources and utilities/sewer districts as key issues. • Enhance transportation infrastructure, transportation services, recycling and sustainability, community centers, social services, and rural areas.
LIVE Housing (739 comments)	<ul style="list-style-type: none"> • Acknowledge housing affordability is an issue in Greenville County (62% agreed). • Identify missing housing products as attainable/affordable homes, “missing middle,” mixed-use, multifamily/townhomes, and senior housing. • Address housing diversity, gentrification, and affordable housing. • Promote sustainable and green design along with home repair and maintenance. • Prevent sprawl by increasing density in certain areas.
BALANCE Land Use (499 comments)	<ul style="list-style-type: none"> • Focus on infill development (and redevelopment) in existing neighborhoods, downtown, and on major corridors. • Consider existing and planned infrastructure and along major corridors to guide future development. • Promote context-based development to enhance existing character. • Balance growth by preserving green and open spaces with conservation-supportive development. • Explore development along the Swamp Rabbit Trail.
MOVE Transportation (612 comments)	<ul style="list-style-type: none"> • Expand and improve quality of public transportation infrastructure and service. • Enhance and expand pedestrian and cyclist mobility and safety with adequate infrastructure, additional sidewalks, crossings, etc. • Address increased traffic and road congestion and maintenance. • Focus on multi-modal transportation planning and related density. • Explore policies and regulations to increase transportation funding.

“Too many little small sewer districts - need one large district that can afford to plan the county.”

“Mental health services and case management for people experiencing homelessness.”

“More mixed-use, multi-family residential and a balance of affordable housing.”

“Assistance for home repair and maintenance.”

“Affordable housing [opportunities] along the Swamp Rabbit Trail where bike/pedestrian accessibility exists.”

“Existing green space, wild, rural, and undeveloped areas should be preserved.”

“Sidewalks to schools, crosswalks, pedestrian awareness.”

“Greenville County must integrate land use planning with transportation planning to achieve densities needed for efficient transit.”

05 | next steps

The comprehensive planning process will continue throughout the summer and fall of 2019, with immediate next steps being a second round of community meetings to be hosted in late June and July.

As *Plan Greenville County* develops, the consultant team will facilitate the development of goals, objectives, and implementation strategies for each plan element as well as a preferred future land use map. The future land use map will be based on a series of development scenarios that will use projected population and employment figures for the year 2040 as a way to explore how Greenville County should grow over the coming decades.

plan greenville county