

GREENVILLE WEST SIDE

COMPREHENSIVE PLAN



February 19, 2014

City of Greenville, South Carolina



Appendix



Appendix **A**

DEMOGRAPHIC AND ECONOMIC DEVELOPMENT OVERVIEW

WEST SIDE GREENVILLE

“LAYING THE GROUNDWORK FOR GROWTH”

GREENVILLE, SOUTH CAROLINA

SEPTEMBER 2013

PREPARED BY

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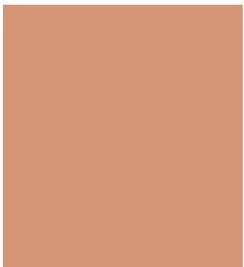
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INTRODUCTION

Developing policies, strategies, and tools for comprehensive planning requires an understanding of underlying socio-economic conditions and forces, the principal topic of this report. There are many sources of the data presented and discussed herein. Much of it is based on regular surveys by the U.S. Census Bureau, but the tabulation of that data was obtained primarily from the private demographics firm of ESRI and its Business Analyst Online database. Labor force information was downloaded from the U.S. Department of Labor and from the South Carolina Department of Employment and Workforce. Long term population projections were obtained from the South Carolina Department of Health & Environmental Control and the South Carolina Budget and Control Board - Office of Research & Statistics.

A note on geography. The next page shows the geographic “bubble” (bold yellow line) that was generally used in obtaining and downloading data that could be isolated to this non-standard geographic area. The bubble purposely includes areas that surround the three defined West Side neighborhoods (dashed yellow line) so that a fuller context of data informs the opportunities and challenges within the West Side.

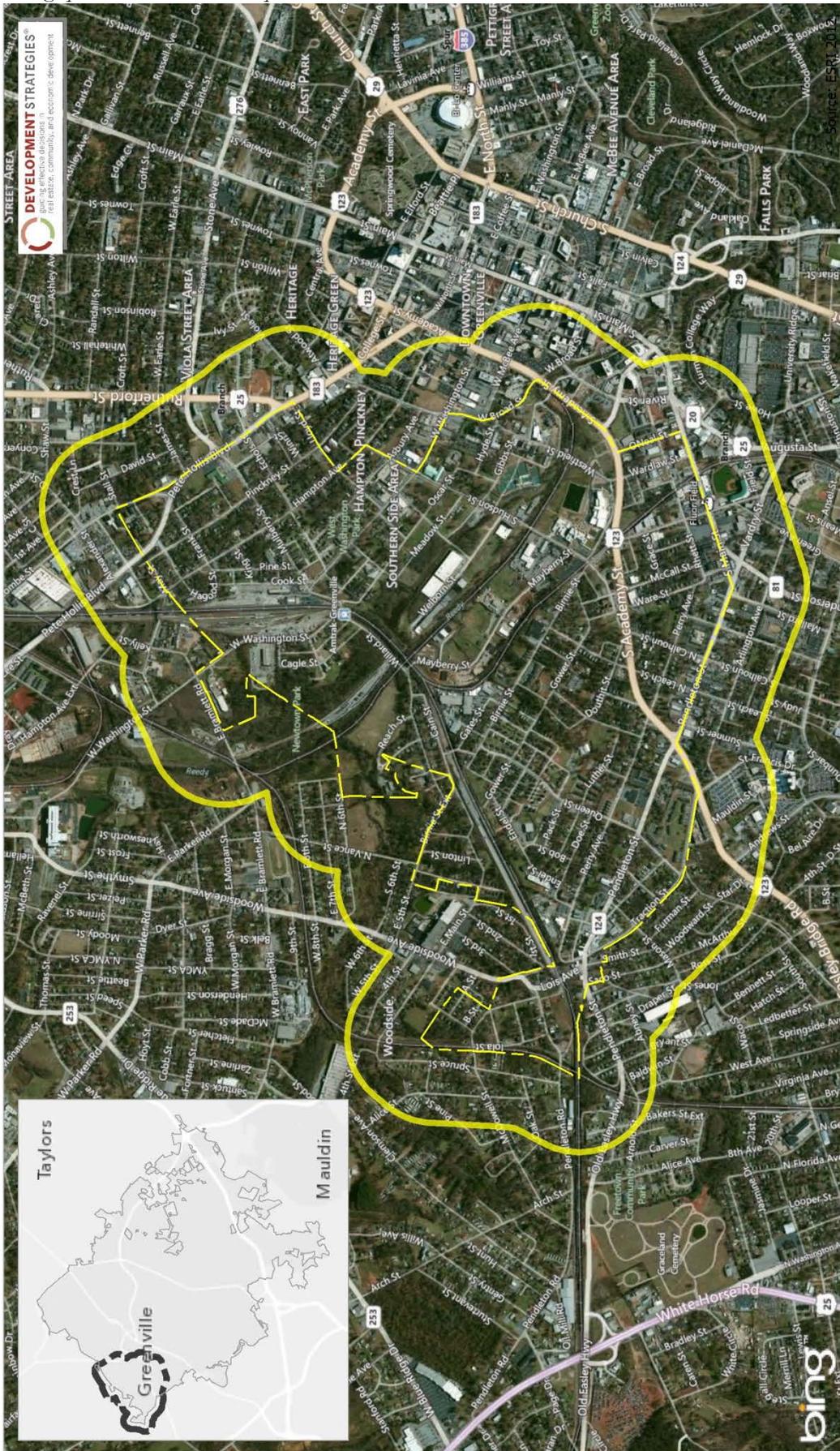
There are many implications that can be drawn from an evaluation of socio-economic data for a complex place like West Side Greenville. This report attempts a few of the more obvious implications, particularly as the amount of

information increases through the report. Certain trends become apparent. Relationships between indicators, or metrics, reveal themselves to reinforce, or even to contradict, preliminary conclusions.

The report concludes with a discussion of the opportunities suggested by population and employment projections in light of existing socio-economic conditions in the West Side. In short, Greenville is a growing area and there are many opportunities for the West Side to share in this growth. Whether it captures a “fair share” of that growth, or more than its historic share, or less, should be a major theme of the comprehensive plan. The West Side exhibits socio-economic conditions that are below the norms for the city and region—lower incomes, lower educational attainment, lower housing values, lower population and job densities, and so on. But it is located adjacent to the very strong and expanding economy and population of Downtown Greenville. It is transected by the very popular Swamp Rabbit Trail and will potentially host a regional park. It is served by transit and by surrounding arterial roads. It exhibits a number of “regional” metrics with regard to retail sales and job counts. Recent investments in schools and the Kroc Center demonstrate a desire to improve the West Side’s quality of life.

So the metrics described in this report should be seen as baseline only, with many opportunities for improvement. Capitalizing on those opportunities

is the challenge for the comprehensive plan and its implementation.



LOCATION MAP West Greenville, SC



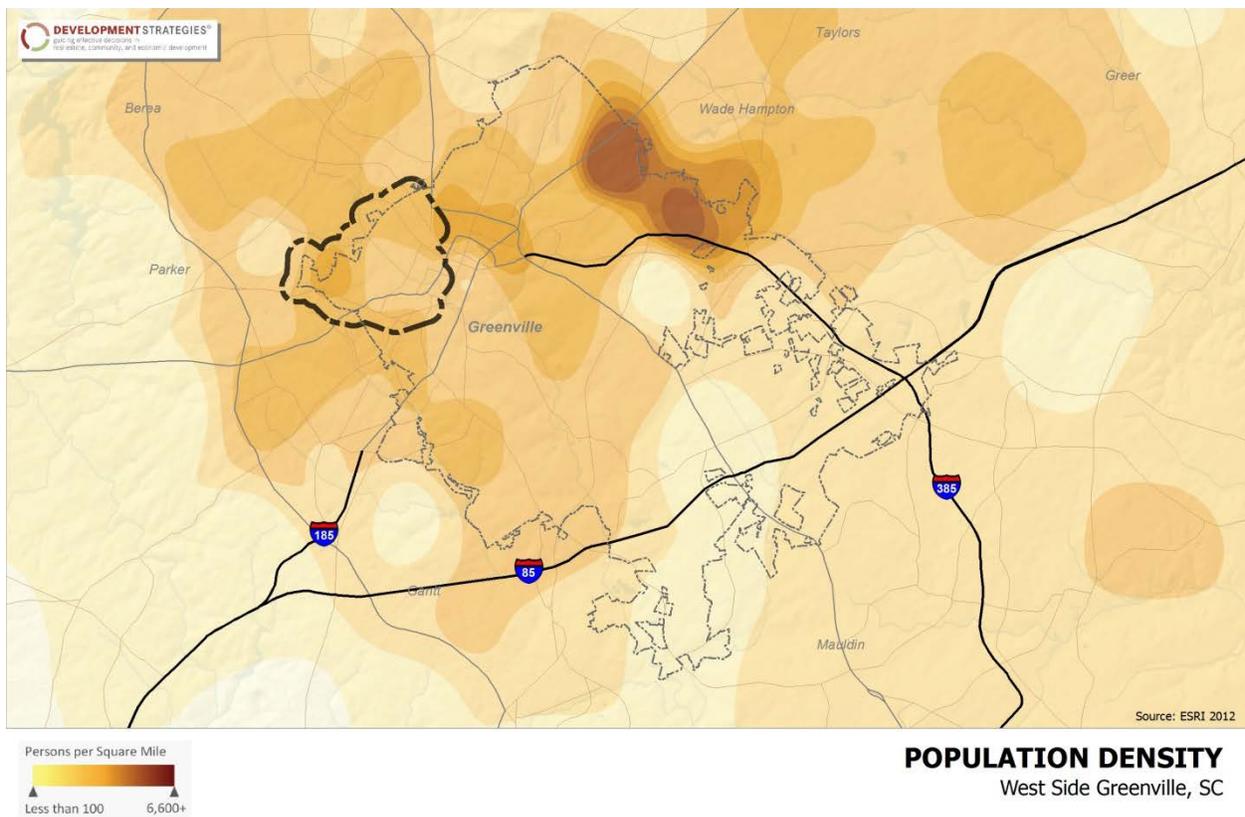
West Greenville Study Area



POPULATION DENSITY

The population density map below shows range of population densities in the greater Greenville area in *persons per square mile* as of 2012.¹ Persons per square mile is measured at the census tract level, then blended with adjacent census tracts to create the image. Areas of dark orange or brown indicate higher densities. The dark area northeast of downtown Greenville is the site of Bob Jones University where there is likely a high concentration of students living within close proximity to the university. Downtown Greenville itself does not have a high population density, but the surrounding residential areas, including West Side (which is outlined in the black dashed line), are relatively dense.

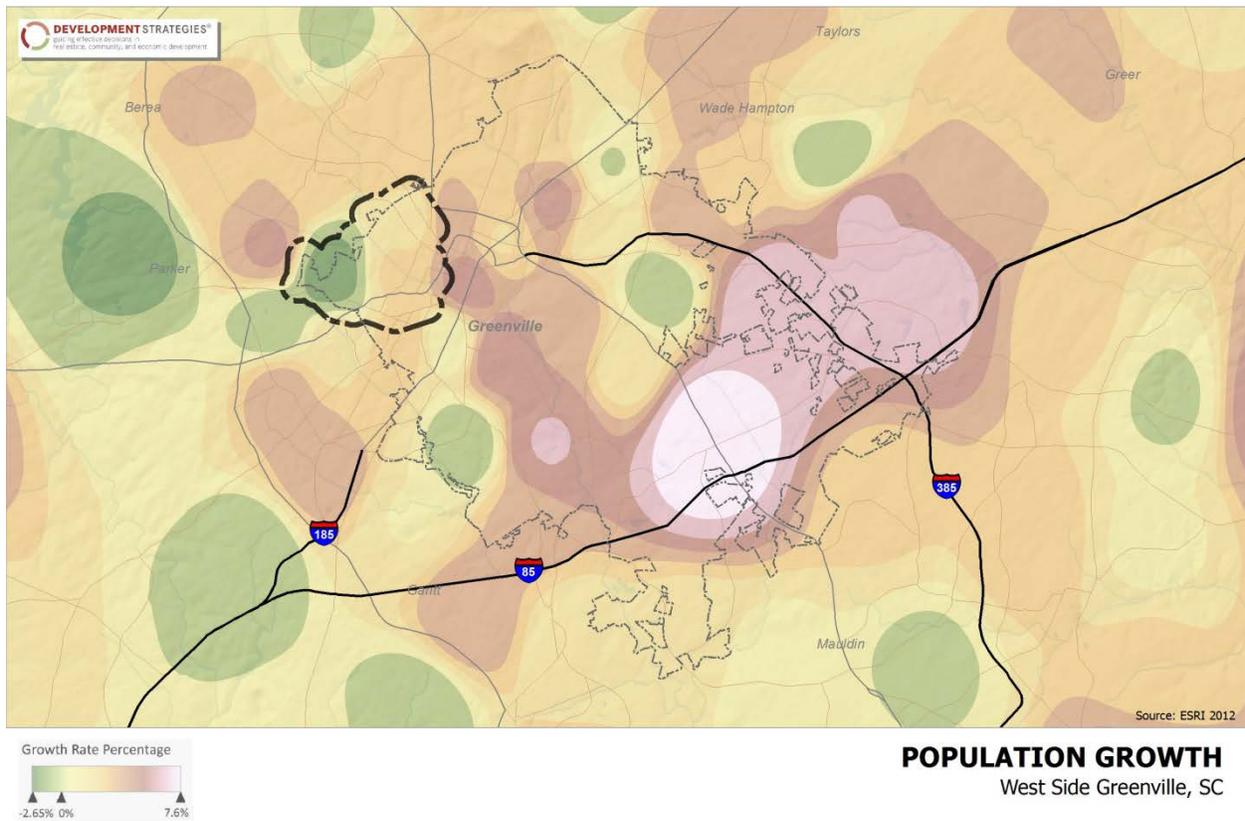
But this relative density has been declining in much of the area, as suggested on the subsequent map on the next page. An implication is that West Side has ample land area for additional housing and population growth through revitalization and redevelopment initiatives. In other words, the West Side used to support more population than lives there today, so there's room for re-growth.



¹ Source: Esri.

POPULATION GROWTH RATES

The population growth map, below, shows the growth rate or loss in greater Greenville between 2000 and 2012. The City of Greenville overall has seen a four percent population increase since 2000. Areas in green experienced population decline. In the West Side, population decline is most likely the result of people leaving their neighborhoods for more desirable areas with higher home values, college age and older children moving away, and the large senior population passing away. The largest population growth and new housing development in Greenville is occurring near the intersection of Interstate 85 and Laurens Road, just south of the municipal airport. Growth in that area (white on the map) has been at about double the citywide average.



West Side, on the other hand demonstrates net population decline in its western edges, and slight growth in the eastern part. The relatively strong growth rate of downtown might serve as a catalyst for spreading more housing and population growth into the West Side.

POPULATION AND HOUSEHOLD TRENDS

Despite overall net population declines in the last decade or so, the West Side population has grown slightly in the past two years, according to estimates by ESRI, a commercial vendor of demographic data using small area estimates from the U.S. Census Bureau's American Community Survey (ACS). West Side as a whole experienced a slight drop in population from 2000 to 2010, but is projected to grow through 2017.

Household sizes, however, are getting smaller. With smaller household sizes coupled to population growth, the demand for housing units will exceed the population growth rate.

Family households in the West Side are not as predominant as elsewhere in the city, MSA, and state.² Husband and wife families (with or without children) are also less predominant compared to the other study areas. Of family households in West Side, 32 percent have only one parent present, a much higher share than elsewhere. Most of these single-parent households are headed by females.

Population & Household Trends				
Description	West Side	Greenville City	Greenville MSA	South Carolina
Population				
2017 Projection	7,730	67,400	693,400	5,032,200
2012 Estimate	7,250	60,900	651,400	4,739,800
2010 Census	7,130	58,400	637,000	4,625,400
2000 Census	7,360	56,000	559,900	4,012,000
Growth 2012-2017	6.6%	10.7%	6.4%	6.2%
Growth 2010-2012	1.7%	4.3%	2.3%	2.5%
Growth 2000-2010	-3.1%	4.3%	13.8%	15.3%
Households				
2017 Projection	3,110	29,770	269,700	1,967,500
2012 Estimate	2,880	26,820	253,500	1,842,900
2010 Census	2,810	25,600	247,300	1,801,200
2000 Census	2,780	24,380	217,200	1,533,900
Growth 2012-2017	8.0%	11.0%	6.4%	6.8%
Growth 2010-2012	2.5%	4.8%	2.5%	2.3%
Growth 2000-2010	1.1%	5.0%	13.9%	17.4%
Household Size				
2017 Projection	2.25	2.09	2.49	2.49
2012 Estimate	2.26	2.08	2.49	2.50
2010 Census	2.27	2.08	2.49	2.49
Growth 2012-2017	-0.4%	0.5%	0.0%	-0.4%
Growth 2000-2010	-0.4%	0.0%	0.0%	0.4%

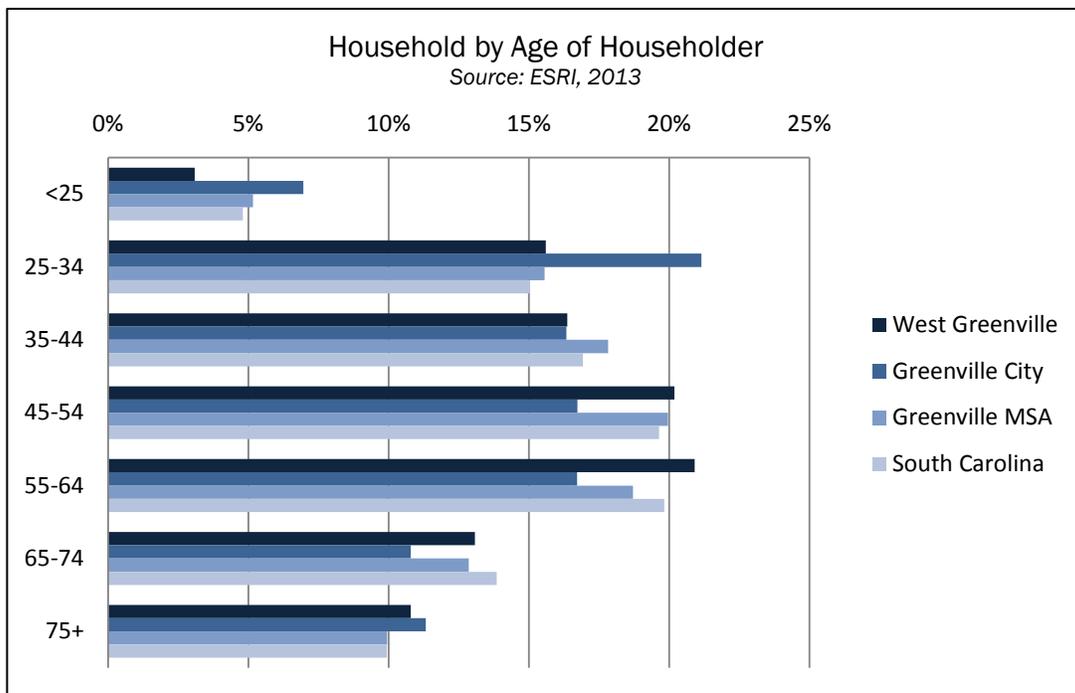
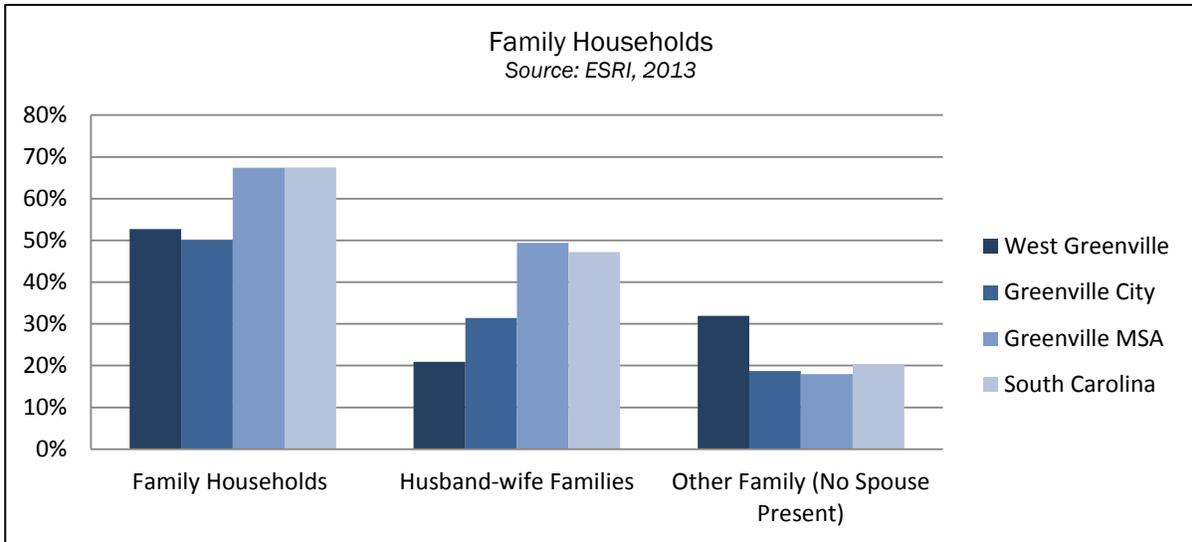
© ESRI, 2013

Household Type				
Description	West Greenville	Greenville City	Greenville MSA	South Carolina
Household Type (2010)				
Non-family Households	7%	8%	6%	6%
One Person Household	40%	42%	27%	27%
Two+ Person Households	60%	58%	73%	74%
Family Households	53%	50%	67%	68%
Husband-wife Families	21%	31%	49%	47%
With Related Children	8%	13%	21%	19%
Other Family (No Spouse Present)	32%	19%	18%	20%
Other Family with Male Householder	6%	4%	5%	5%
With Related Children	2%	2%	3%	3%
Other Family with Female Householder	26%	15%	13%	16%
With Related Children	16%	10%	9%	10%

© ESRI, 2013

² Family households consist of related individuals, while non-family households are either single-person households or are made up of unrelated individuals

West Side has a large number of householders that are 45-to-64 years old compared to the other study areas. Altogether, West Side has a higher share of middle-age and senior households than the city, metro area, and state.



POPULATION BY AGE

West Side’s population is older than the other study areas, with a median age of 40.1 years. According to ESRI’s 2012 estimates, 57 percent of the West Side population is over the age of 35.

The high median age in West Side is a result of declines in the school-age population, or kindergarten through 12th grade (22 percent decrease), the College

Age population (six percent decrease), and Family Years (twelve percent decrease) over the past decade. On the other hand, the Empty Nester population (age 50 to 64) has grown by almost 50 percent in the past decade.

All cohorts are projected to increase in population through 2017, but younger cohorts are projected to grow only slightly compared to the Empty Nesters, Seniors, and 75+ age cohorts. Due to planning and development implications from this projected strong growth in the senior population, a more detailed breakdown of senior population characteristics is presented in the last section of this report.

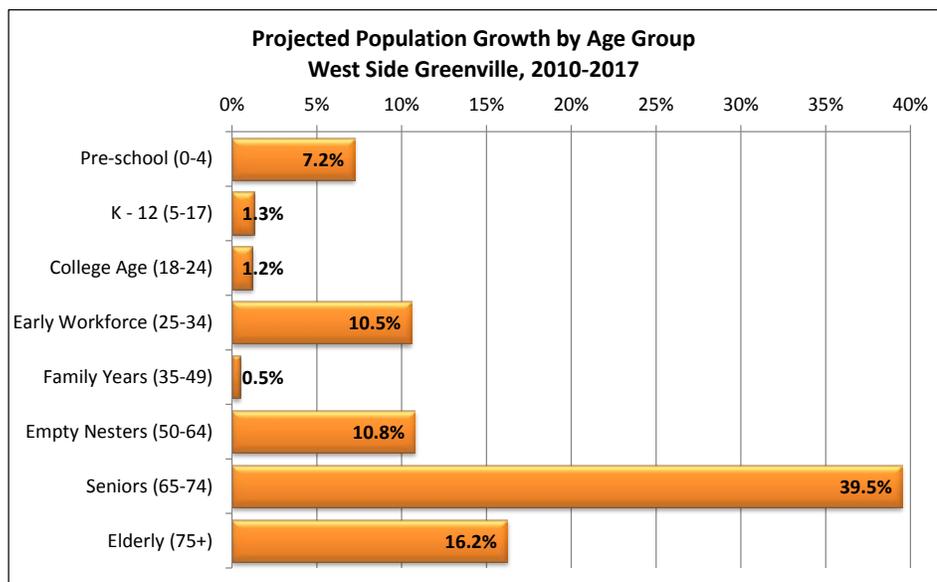
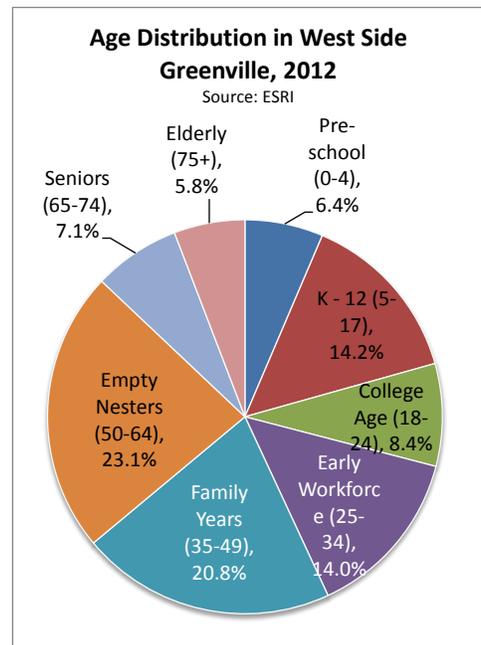
POPULATION PROJECTIONS

Projections of the population through 2017 (by ESRI) suggest three “challenges” to address in the comprehensive plan:

- With strong projections for seniors and elderly, there will be an

Age Cohort	West Side	Greenville City	Greenville MSA	South Carolina
Total population:	7,247	60,935	651,393	5,032,194
0 - 4 (Pre-school)	6.4%	6.4%	6.5%	6.5%
5 - 17 (K-12)	14.2%	12.7%	16.6%	16.4%
18 - 24 (College Age)	8.4%	13.8%	11.1%	10.3%
25 - 34 (Early Workforce)	14.0%	17.3%	13.0%	13.0%
35 - 49 (Family Years)	20.8%	18.6%	19.9%	19.4%
50 - 64 (Empty Nesters)	23.1%	17.9%	19.4%	20.2%
65 - 74 (Seniors)	7.1%	6.8%	8.0%	8.5%
75+ (Elderly)	5.8%	6.6%	5.8%	5.8%
Median Age (years)	40.1	35.0	37.3	38.1

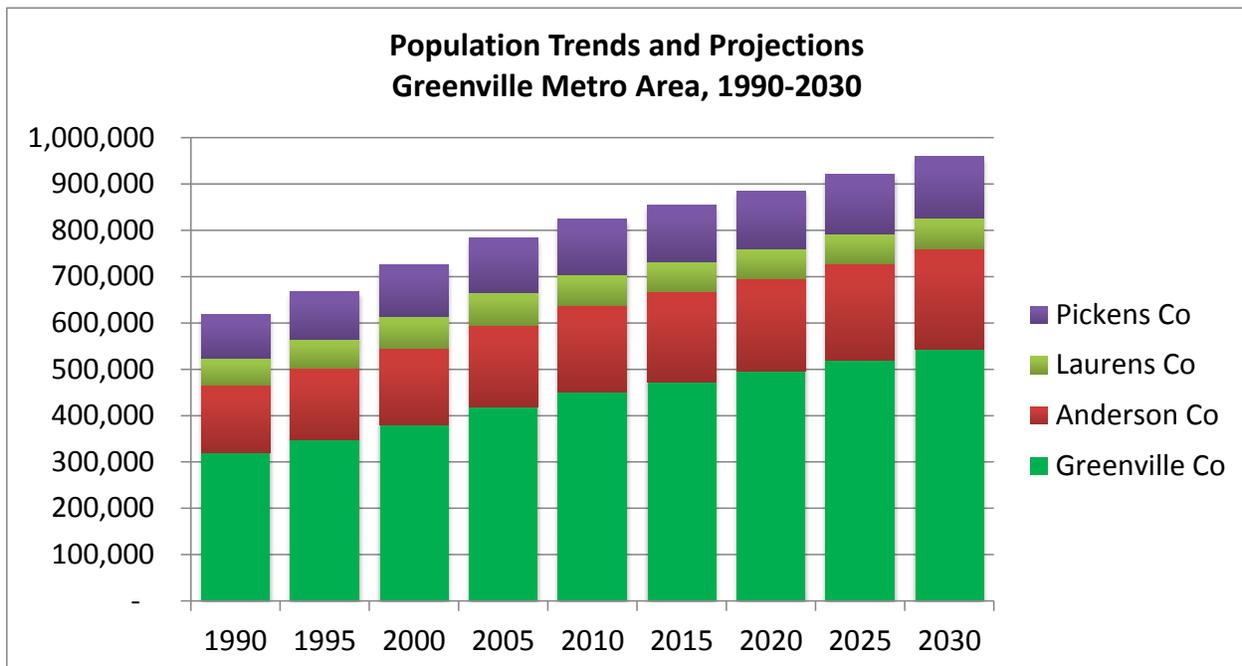
© ESRI, 2013



increased need to serve this “dependent” population, or people typically not in the labor force, and, therefore, dependent on non-labor income such as pensions and social security.

- Growth in the Early Workforce age group requires support mechanisms for obtaining and retaining jobs, while Empty Nester growth can create concerns about the re-training of older workers as structural economic changes occur.
- Growth in age groups from Pre-School to Family Years raise challenges for supporting families and children, particularly those most vulnerable to poor education circumstances.

While ESRI provides short term population projections at a small geographic level, the State of South Carolina projects long term population growth for each county. Below is depicted the projections from the S.C. Department of Health and Environmental Control and the S.C. Budget and Control Board - Office of Research & Statistics for the four counties of the Greenville metropolitan statistical area (MSA)³. Between 2010 and 2030, Greenville County is projected to add almost 91,100 net new residents, a 20-year growth rate of 20.2 percent. Anderson County would add another 31,400 residents (up 16.8%), Laurens County would actually shrink by 1,500 (down 2.3%), and Pickens County would add 13,700 (up 11.5%).

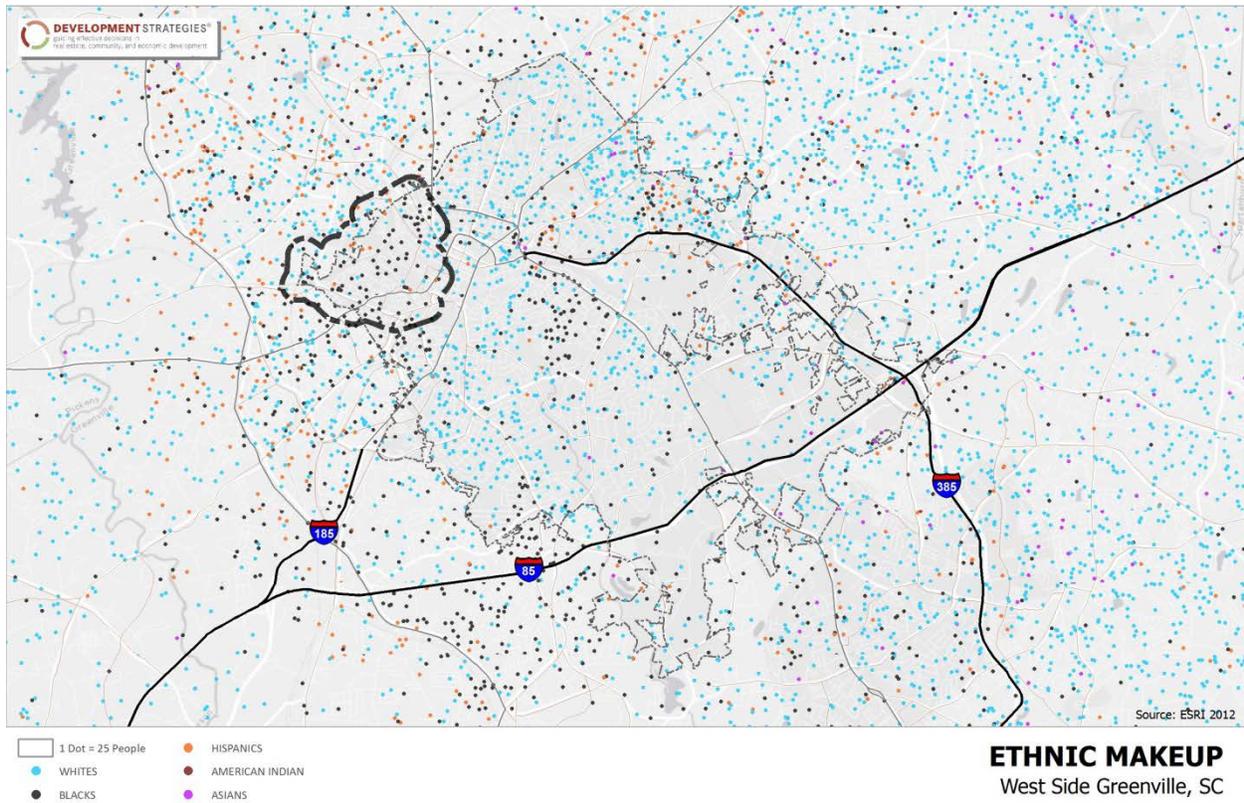


Altogether, the four counties would net about 134,600 more residents over 20 years for a growth rate of 16.3%. Greenville County would be the fastest growing, both in terms of numbers and percentage change. Capturing some of this growth should be a goal of the West Side comprehensive plan.

³ Technically, Anderson County is not part of this MSA but is included here because of the close socio-economic relationship between Greenville and Anderson Counties.

RACE AND ETHNICITY

The map below shows the ethnic make-up of the Greenville area. Each dot represents 25 people in each census tract. This map shows the concentration of the black population and also demonstrates West Side’s relative diversity.



The population of West Side is predominately black, but the population has become more diverse in the past decade, a trend that is projected to increase through 2017. The “Some Other Race” category has increased by four percent in the last decade, and the West Side has the highest concentration of people of Hispanic origin of all the study areas. Hispanics are projected to increase from 4% to 10% of the West Side by 2017.

	West Side			Greenville City			Greenville MSA			South Carolina		
	2000	2010	2017	2000	2010	2017	2000	2010	2017	2000	2010	2017
Total population:	7,360	7,130	7,730	56,000	58,400	67,400	559,900	637,000	693,400	4,012,000	4,625,400	5,032,200
White Alone	29.1%	33.0%	32.1%	62.1%	64.0%	62.0%	79.3%	76.2%	73.9%	67.2%	66.2%	65.0%
Black Alone	68.1%	59.3%	58.2%	33.9%	30.0%	30.3%	17.0%	16.7%	17.2%	29.5%	27.9%	27.7%
American Indian Alone	0.2%	0.3%	0.4%	0.1%	0.3%	0.4%	0.2%	0.3%	0.4%	0.3%	0.4%	0.5%
Asian Alone	0.4%	0.4%	0.4%	1.3%	1.4%	1.7%	1.2%	1.7%	2.0%	0.9%	1.3%	1.6%
Pacific Islander Alone	0.0%	0.1%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%
Some Other Race Alone	1.5%	4.8%	6.0%	1.4%	2.5%	3.2%	1.2%	3.3%	4.2%	1.0%	2.5%	3.1%
Two or More Races	0.9%	2.2%	2.7%	1.1%	1.8%	2.3%	1.0%	1.7%	2.2%	1.0%	1.7%	2.1%
Hispanic Origin	3.9%	8.3%	10.4%	3.4%	5.9%	7.5%	3.1%	6.7%	8.7%	2.4%	5.1%	6.5%

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HOUSING OVERVIEW

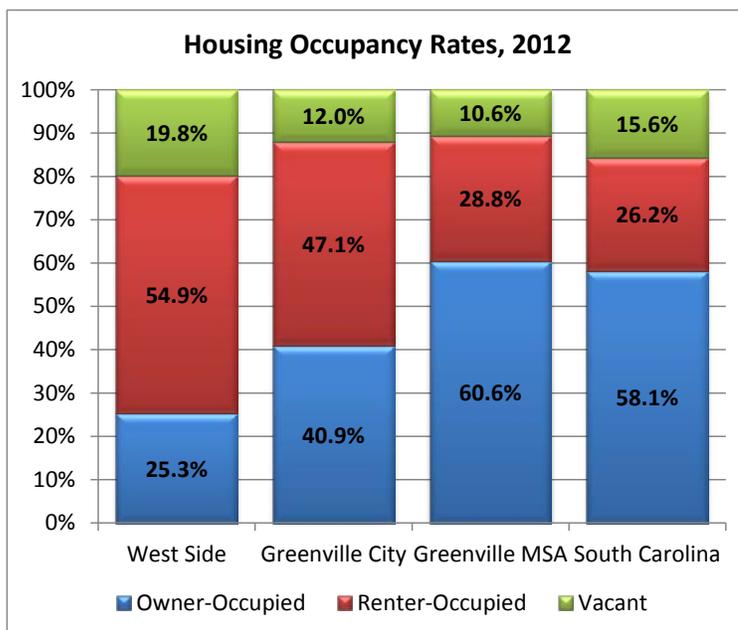
Six out of ten homes in the West Side are single family structures.

Multifamily buildings with two-to-four units comprise another two out of ten units. Unlike in the MSA and State, most people in West Side rent their homes (68 percent). Over the past two decades, the trend of renter occupied units has not changed in West Side suggesting a stable neighborhood and a stable level of homeownership and investment in the area.

The 68 percent of households that are renters accounts for becomes about 55 percent of all housing. Households are the same as occupied housing units, so household measures exclude vacant units. When considering all housing, whether occupied or not, almost 20 percent is vacant within the West Side, a much higher proportion than throughout the metro area and state, and somewhat higher than in the City as a whole. Most urban analysts prefer to see higher homeownership rates as an indicator of neighborhood stability and willingness of residents to reinvest where they live.

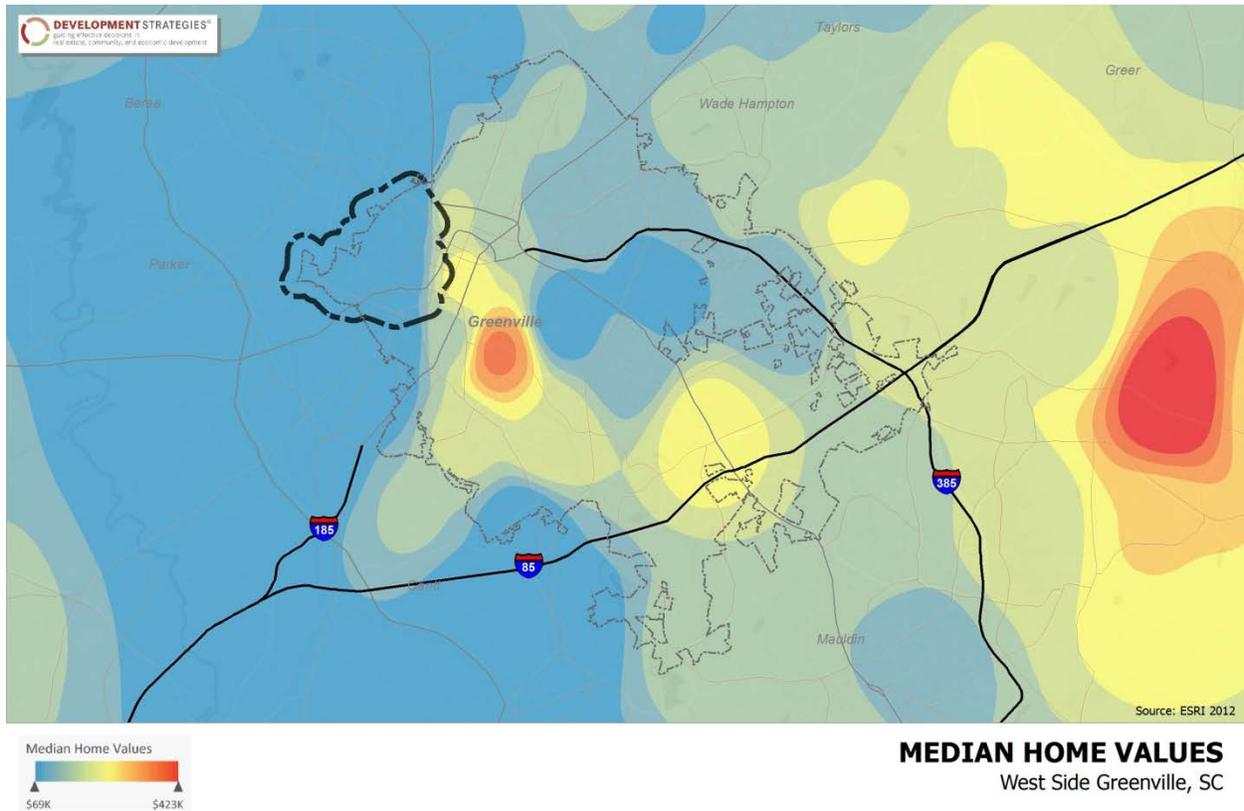
Housing Overview				
Description	West Side	Greenville City	Greenville MSA	South Carolina
Housing Units (2012)	3,590	30,480	283,600	2,184,800
Occupied Housing Units (2012)	2,880	26,820	253,500	1,842,900
Occupancy Rate	80.2%	88.0%	89.4%	84.4%
Housing Units by Units in Structure (2000)				
1, Detached	60.4%	53.9%	64.2%	61.5%
1, Attached	3.6%	3.8%	2.1%	2.3%
2	10.4%	5.7%	2.5%	2.5%
3 to 4	10.0%	7.1%	2.7%	3.3%
5 to 9	6.3%	10.0%	4.8%	4.4%
10 to 19	1.8%	8.1%	3.4%	2.4%
20 or More	4.4%	11.0%	3.9%	3.2%
Mobile Home	3.0%	0.4%	16.3%	20.3%
Other	0.0%	0.0%	0.1%	0.1%
© ESRI (2000/2010), 2012	100%	100%	100%	100%

Households Overview				
Description	West Side	Greenville City	Greenville MSA	South Carolina
Tenure of Occupied Housing Units (2012)				
Percent of Owner-Occupied Units	31.6%	46.5%	67.7%	68.9%
Percent of Renter-Occupied Units	68.4%	53.5%	32.3%	31.1%
Households by Household Type (2010)				
Family Households	52.7%	50.1%	67.4%	67.5%
Non-Family Households	47.3%	49.8%	32.6%	32.4%
Households by Household Size (2010)				
One Person	40.0%	41.7%	26.6%	26.5%
Two Persons	27.1%	30.9%	34.3%	34.6%
Three Persons	14.6%	13.1%	16.8%	16.9%
Four Persons	8.9%	8.8%	13.4%	12.9%
Five or More	9.5%	5.4%	9.0%	9.1%
Average HH Size (persons per HH)	2.27	2.08	2.49	2.49
Median Housing Value (2012)	\$81,400	\$147,600	\$132,600	\$136,900
© ESRI, 2013				



MEDIAN HOUSING VALUES

The map below shows median home values in the Greenville area measured at the census tract level. Home values south of Downtown Greenville are high along with homes in the eastern suburbs. The map indicates home values in West Side are among the lowest in the area and are on par with the rural area west of the city.



With population growth, assuming the West Side can capture much of the growth coming to the City and County of Greenville, demand for housing should rise, as should housing prices. Conversely, creation of higher value housing in the West Side can be crucial in attracting higher income

Owner Occupied Housing Value				
Description	West Side	Greenville City	Greenville MSA	South Carolina
Total Housing Units (2012)	910	12,460	171,700	1,270,400
Median Home Value (2012)	\$81,400	\$147,600	\$132,600	\$136,900
<\$50,000	19.8%	4.6%	7.9%	8.2%
\$50,000-\$99,999	48.1%	22.9%	25.4%	24.3%
\$100,000-\$149,999	14.5%	23.7%	25.6%	23.6%
\$150,000-\$199,999	7.8%	14.6%	16.9%	16.3%
\$200,000-\$249,999	3.3%	9.4%	9.0%	9.4%
\$250,000-\$299,999	2.6%	7.2%	5.3%	5.7%
\$300,000-\$399,999	2.5%	7.4%	5.0%	5.9%
\$400,000-\$499,999	0.9%	3.8%	2.2%	2.7%
\$500,000-\$749,999	0.4%	4.5%	1.8%	2.5%
\$750,000-\$999,999	0.0%	1.5%	0.5%	0.8%
\$1,000,000+	0.0%	0.5%	0.2%	0.5%

© ESRI, 2013

residents.

HOUSEHOLD INCOME

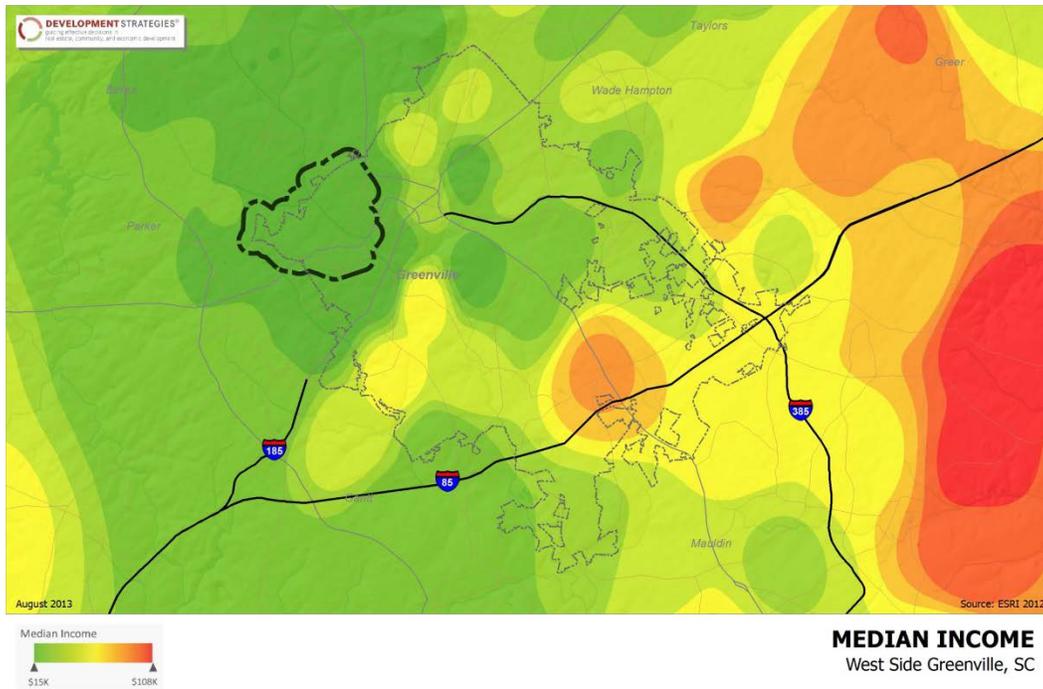
Median household income in West Side is 50 percent lower than in the city as a whole, and 56 percent lower than in the MSA. One out of six West Side households is considered low income at less than \$25,000 per year.

Household income is defined as income from all individuals age 15 and older occupying a single housing unit, whether related to the householder or not. Median family income is often higher than median household income because many households consist of only one person and, therefore, have only one wage earner. Single householders are not considered families and are not incorporated into the median family income of an area, though they are incorporated into median household incomes.

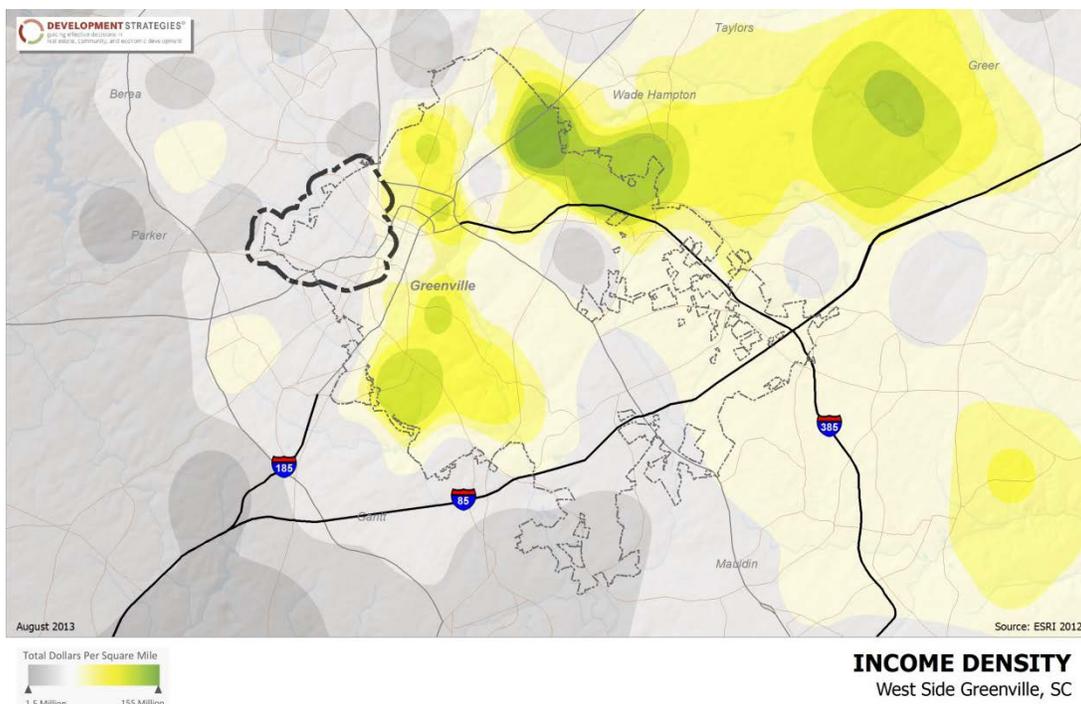
That said, note the difference between household (table to the left) and area family median income (table to the right) for the MSA. Family median incomes in the Greenville MSA have been on the rise in the last decade, despite a drop in 2007 as a result of the recession.

Income Trend and Distribution Comparison					Trends in Area Family Median Income	
Description	West Side	Greenville City	Greenville MSA	South Carolina	Year	Greenville MSA
Median Household Income						
2017 Projection	\$19,400	\$43,500	\$50,200	\$48,500	2004	\$54,900
2012 Estimate	\$18,500	\$36,800	\$42,100	\$41,400	2005	\$54,900
2000 Census	\$18,300	\$33,200	\$39,200	\$37,100	2006	\$56,500
Annual Growth 2012-2017	1.0%	3.4%	3.6%	3.2%	2007	\$52,900
Annual Growth 2000-2012	0.1%	0.9%	0.6%	0.9%	2008	\$55,100
2012 Income Distribution						
Total households:	2,880	26,820	253,500	1,842,900	2009	\$57,200
<\$15,000	41.2%	20.0%	15.3%	16.9%	2010	\$58,000
\$15,000 - \$24,999	19.3%	14.7%	13.8%	13.3%	2011	\$58,300
\$25,000 - \$34,999	12.7%	13.0%	12.6%	12.0%	2012	\$59,000
\$35,000 - \$49,999	12.5%	14.1%	14.9%	15.1%	2013	\$58,000
\$50,000 - \$74,999	8.1%	15.0%	18.1%	18.5%	<i>Source: U.S. Dept. of Housing & Urban Development, 2013</i>	
\$75,000 - \$99,999	2.9%	6.8%	10.1%	10.2%		
\$100,000 - \$149,999	2.5%	8.9%	9.8%	9.2%		
\$150,000 - \$199,999	0.5%	3.5%	2.6%	2.5%		
\$200,000 +	0.3%	3.9%	2.7%	2.2%		

The map at the top of the next page shows median household income values for the Greenville area measured at the census tract level. The suburban areas east of Greenville have the highest median incomes while areas west of Downtown Greenville have the lowest. West Side is noteworthy for being among the lowest median income areas.



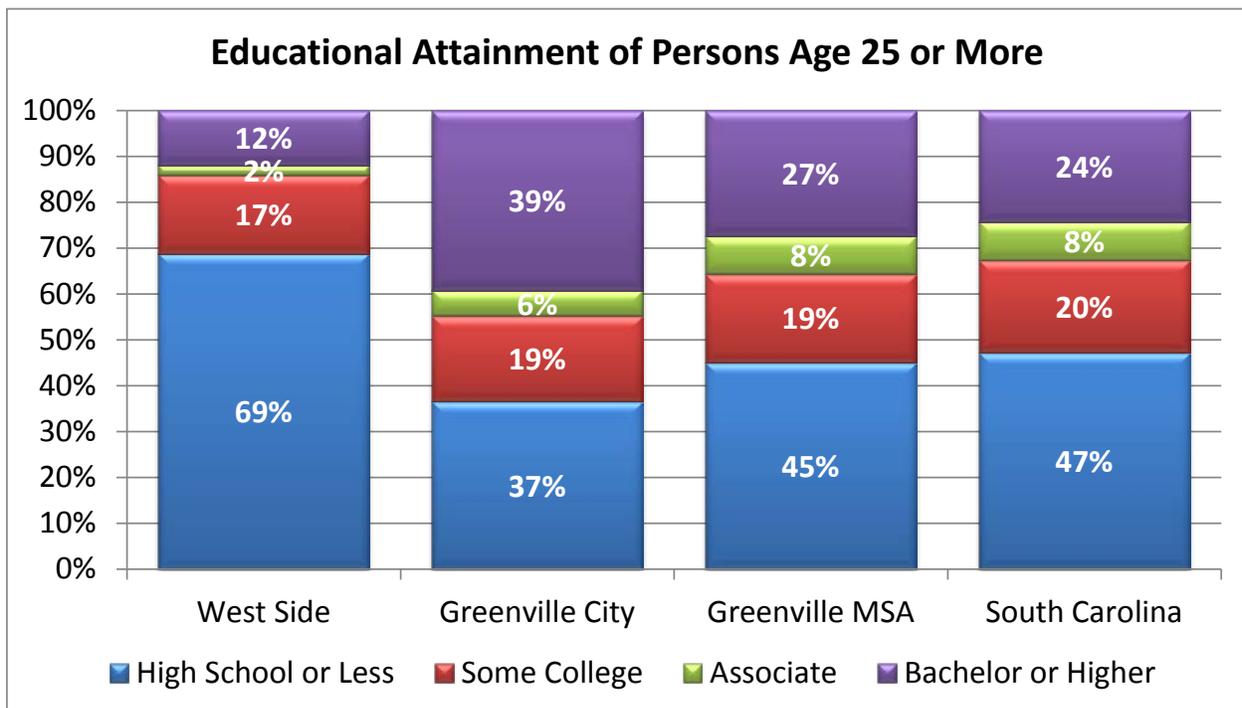
The next map, below, shows household income density in the Greenville area, measured in dollars per square mile at the census tract level. The areas of the highest income density correspond somewhat with areas of high population density. Combining the West Side’s relatively low density population and low median incomes yields low income density, which would typically be discouraging to housing developers and businesses dependent on local retail customers. The West Side’s location, however, might be beneficial for businesses and employers who have regional customers and labor force.



EDUCATIONAL ATTAINMENT

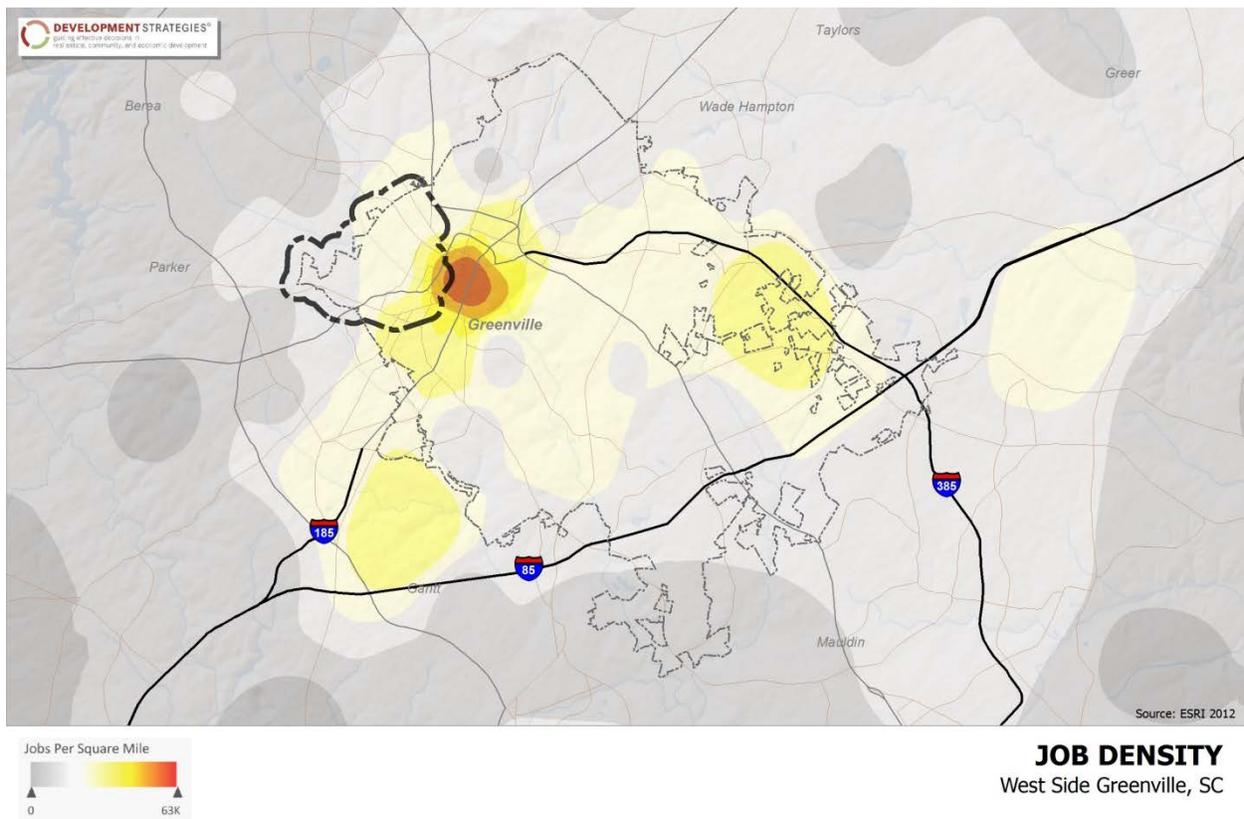
Educational attainment in West Side is poor with only 14 percent of the population over the age of 25 holding an Associate’s degree or higher. The city of Greenville as a whole, however, has a high percent of people aged 25 year or older with Associate’s degrees or more (45 percent). Low education levels on the West Side can be partially attributed to the trend where the College Age and Family Year population cohorts have been declining over the past decade.

There are encouraging signs, nonetheless. In the last ten years or so, the percent of West Side individuals over the age of 25 with at least some college education increased by six percent and the number of people with bachelor’s degrees and higher has also increased. Meanwhile, the percent of residents with only high school diplomas has decreased as higher degrees have increased. The trend is upward, but there is much improvement yet to be achieved.



WHERE THE JOBS ARE

The map below shows job density measured in jobs per square mile. This data is measured at the census tract level. The map shows the highest concentration of jobs in Downtown Greenville—by far. West Side’s proximity to downtown’s businesses is an excellent asset for residents if job qualifications match the diversity of occupational opportunities in the greater downtown area. As is shown on the next pages, the West Side exhibits some relatively strong economic indicators, suggesting that it is well located as a regional attraction for business operations and, perhaps, housing and labor force.



EMPLOYMENT PROJECTS BY SECTOR

Projected employment over ten years in Greenville County is depicted on the table, below. While the beginning and ending dates of these official projections do not fully reflect the next ten years, these are the latest available projections and serve comprehensive planning purposes quite well.

Projections of Employment by Industry Sector Greenville County, South Carolina						
Economic Sectors	Source: S.C. Dept. of Empl. & Workforce				Source: Dev Strategies	
	2008	2018	Change	Percent	Square Feet Per Employee	Square Feet Needed
Total Employment, All Jobs	265,147	288,216	23,069	8.70%	290	6,715,700
Admin Support & Waste Mgt	26,871	31,977	5,106	19.00%	300	1,531,800
Health Care & Social Asst	25,676	30,565	4,889	19.04%	300	1,466,700
Profess, Scien, & Tech Services	14,105	18,973	4,868	34.51%	300	1,460,400
Educational Services (private)	15,422	18,132	2,710	17.57%	450	1,219,500
Accommodations & Food Services	20,439	21,964	1,525	7.46%	500	762,500
Other Non-Govt Services	11,408	12,639	1,231	10.79%	300	369,300
Real Estate, Rental, Leasing	3,986	5,101	1,115	27.97%	200	223,000
Wholesale Trade	11,808	12,675	867	7.34%	600	520,200
Finance & Insurance	8,304	8,999	695	8.37%	250	173,800
Arts, Entertainment, Recreation	2,981	3,409	428	14.36%	300	128,400
Retail Trade	30,360	30,769	409	1.35%	500	204,500
Transportation & Warehousing	8,891	9,245	354	3.98%	1,000	354,000
Information	6,037	6,347	310	5.14%	225	69,800
Mgt of Enterprises	4,243	4,470	227	5.35%	300	68,100
Government	9,613	9,739	126	1.31%	250	31,500
Construction	13,084	13,096	12	0.09%	200	2,400
Utilities	1,025	873	(152)	-14.83%	700	(106,400)
Manufacturing	31,442	28,905	(2,537)	-8.07%	800	(2,029,600)
All Other Sectors	19,452	20,338	886	4.55%	300	265,800

Most notable are the projections for utilities and manufacturing sectors in the county which are projected to decline substantially in job counts. This translates to a need for a reduction in related industrial facilities floor area (far right column). Meanwhile, the top three sectors would add almost 15,000 net new jobs by themselves, almost all of which would require added forms of office space, including medical offices, labs, incubators, and research centers, as well as more traditional office space.

The city of Greenville presently captures about 24 percent of all jobs within Greenville County, and the West Side study area contains about nine percent of all city-based jobs. As a starting point for planning in the West Side, a “fair share” capture of future jobs and floor area by sector would retain those percentages.

BUSINESS OVERVIEW

The West Side study area encompasses some 651 total businesses and 6,702 employees according to data obtained from ESRI's *Business Analyst Online* database (see table on next page). While these might seem to be large values for West Side, it is important to recall that the West Side *study area* incorporates the western fringe of downtown, so there may be something of an overstatement in business counts for West Side itself. Even so, this adjacency to downtown should be leveraged for additional business concentration in West Side.

As shown on the table to the right, the high employee-to-resident ratios in the West Side (0.92) and Greenville City (1.18) indicate a relatively strong economic concentration of jobs in these areas when compared to the MSA and the State.

	West Greenville	Greenville City	Greenville MSA	South Carolina
Total Businesses	651	6,489	35,490	245,935
Total Employees	6,702	71,769	259,025	1,700,182
Total Residential Population	7,247	60,935	651,393	4,739,840
Employee/ Residential Ratio	0.92	1.18	0.40	0.36

© ESRI, 2013

Industry	West Side		Greenville City		Greenville MSA		South Carolina	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	1	0.2%	22	0.3%	347	1.0%	4,656	1.9%
Mining	0	0.0%	2	0.0%	11	0.0%	115	0.0%
Utilities	1	0.2%	7	0.1%	48	0.1%	439	0.2%
Construction	48	7.4%	291	4.5%	3,408	9.6%	24,298	9.9%
Manufacturing	24	3.7%	175	2.7%	1,437	4.0%	8,206	3.3%
Wholesale Trade	36	5.5%	258	4.0%	1,680	4.7%	9,880	4.0%
Retail Trade	48	7.4%	775	11.9%	4,062	11.4%	29,593	12.0%
Transportation & Warehousing	16	2.5%	81	1.2%	755	2.1%	7,039	2.9%
Information	16	2.5%	123	1.9%	524	1.5%	3,386	1.4%
Finance & Insurance	32	4.9%	466	7.2%	1,515	4.3%	9,280	3.8%
Real Estate, Rental & Leasing	30	4.6%	378	5.8%	1,676	4.7%	11,076	4.5%
Professional, Scientific & Tech Services	102	15.7%	1,265	19.5%	4,468	12.6%	27,171	11.0%
Management of Companies & Enterprises	1	0.2%	29	0.4%	130	0.4%	595	0.2%
Administrative & Support & Waste Management	48	7.4%	682	10.5%	6,046	17.0%	40,273	16.4%
Educational Services	15	2.3%	133	2.0%	592	1.7%	4,274	1.7%
Health Care & Social Assistance	63	9.7%	552	8.5%	2,150	6.1%	15,802	6.4%
Arts, Entertainment & Recreation	18	2.8%	101	1.6%	522	1.5%	4,089	1.7%
Accommodation & Food Services	27	4.1%	349	5.4%	1,568	4.4%	11,466	4.7%
Other Services (except Public Administration)	106	16.3%	699	10.8%	4,184	11.8%	30,520	12.4%
Public Administration	19	2.9%	101	1.6%	367	1.0%	3,777	1.5%
Total	651		6,489		35,490		245,935	

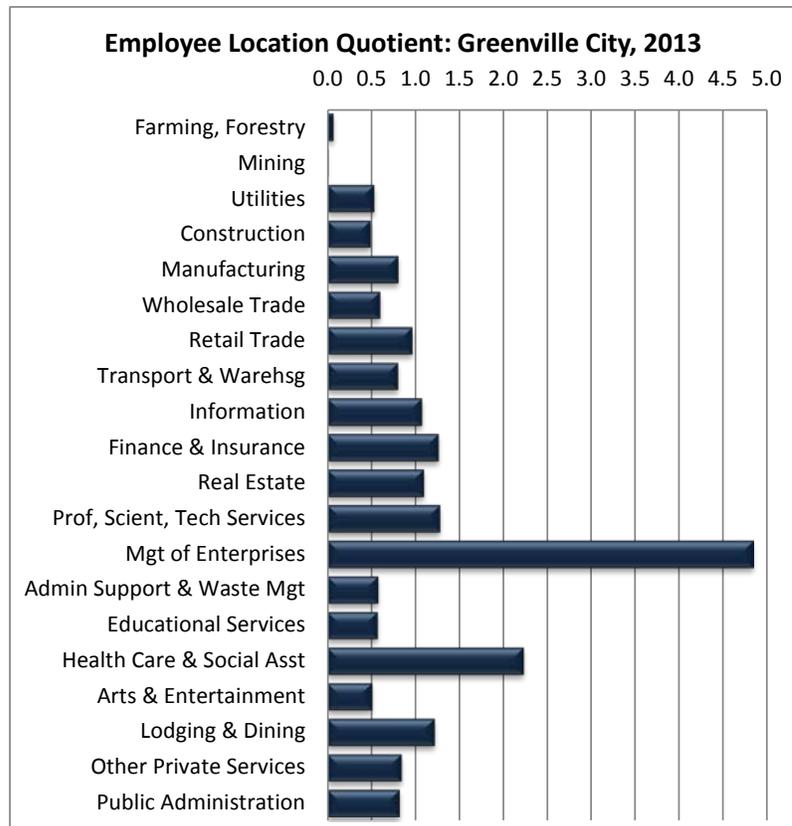
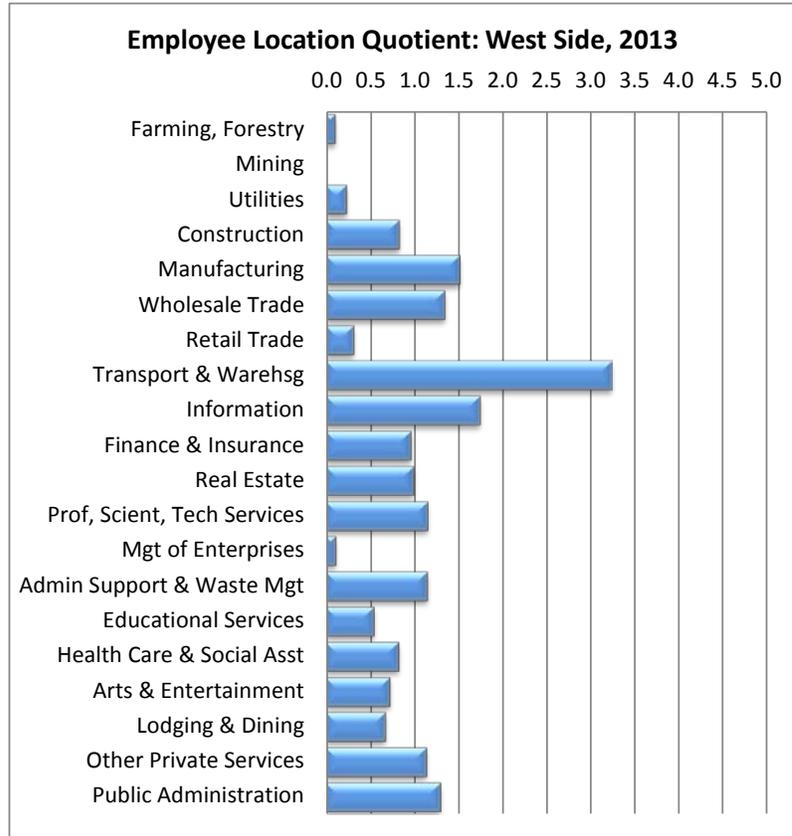
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Location Quotients show an area's distribution of employment by sector compared to the entire U.S. economy. An LQ greater than 1.0 indicates a sector with a greater share of the local area businesses or employment than in the U.S. as a whole. That is usually an indicator of an “export sector,” or a sector that helps bring “new money” into the local economy from outside.

Because of the high concentration of businesses and jobs in the downtown area, which seems to influence West Side as well, location quotients in West Side are quite strong.

This suggests that West Side has a robust relationship with the downtown area, but it also suggests that the West Side is a good “regional” location that attracts labor force and customers from a wide geographic area. If West Side is, indeed, a regional economic location, this, too, must be leveraged for revitalization, both for housing as well as business and job growth.

Notable “export” strengths in the West Side are in the sectors of Transportation and Warehousing, Information, Manufacturing, and Wholesale Trade. All but one of these (Information) are clear indicators of

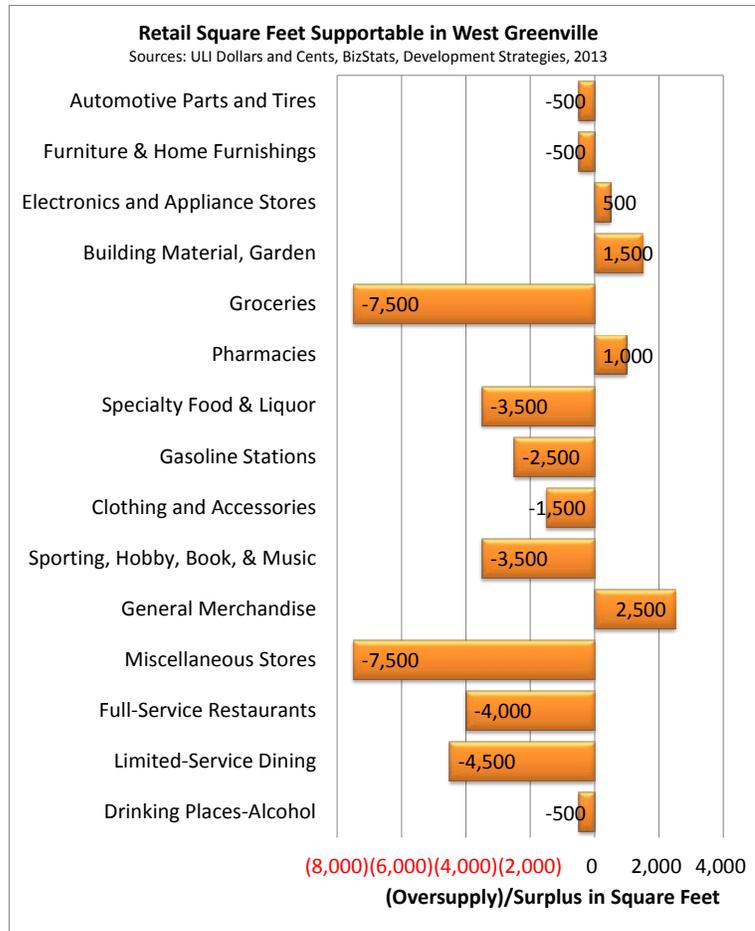


the West Side's strength as a regional center. The Information sector, however, is emerging on the West Side because of the kinds of employees it typically requires (well educated, preference for urban centers).

In Greenville City as a whole, strong sectors in terms of the numbers of employees are Management of Companies and Enterprises (Greenville is a regional headquarters location); Health Care and Social Assistance; Finance and Insurance; Professional, Scientific, and Technical Services; and Real Estate, Rental and Leasing.

RETAIL MARKET OVERVIEW

The table below and the graph to the right show the difference between annual residentially-driven retail demand (“purchasing power”) in the West Side area and actual retail sales achieved by West Side merchants in 2012. This data demonstrates there are more retail sales in West Side than residents, themselves, can support. For instance, the table below shows that West Side residents generate \$28.8 million in annual retail purchases, while businesses in the West Side study area attract \$49.8 million in sales. Therefore, residents from the surrounding city and county areas clearly help to support the retail in the West Side study area.



Comparison of Retail Buying Power and Actual Retail Sales West Greenville Neighborhoods - Greenville, South Carolina			
<i>Retail Stores</i>	<i>Demand (Consumer Expenditures)</i>	<i>Supply (Est. Retail Sales)</i>	<i>Opportunity Gap/Surplus</i>
Automotive Parts and Tires	\$551,627	\$734,990	(\$180,000)
Furniture & Home Furnishings	\$726,319	\$1,239,872	(\$510,000)
Electronics and Appliance Stores	\$969,013	\$584,363	\$380,000
Building Material, Garden	\$903,886	\$95,514	\$810,000
Groceries	\$5,168,464	\$8,676,821	(\$3,510,000)
Pharmacies	\$2,888,484	\$1,665,215	\$1,220,000
Specialty Food & Liquor	\$356,840	\$2,485,473	(\$2,130,000)
Gasoline Stations	\$4,155,708	\$10,176,909	(\$6,020,000)
Clothing and Accessories	\$2,142,221	\$3,210,339	(\$1,070,000)
Sporting, Hobby, Book, & Music	\$715,353	\$2,573,031	(\$1,860,000)
General Merchandise	\$6,108,907	\$4,553,896	\$1,560,000
Miscellaneous Stores	\$739,460	\$3,667,935	(\$2,930,000)
Full-Service Restaurants	\$1,441,916	\$4,175,475	(\$2,730,000)
Limited-Service Dining	\$1,703,563	\$5,268,832	(\$3,570,000)
Drinking Places-Alcohol	\$240,367	\$645,783	(\$410,000)
Total:	\$28,812,128	\$49,754,448	(\$20,950,000)

Supply and Demand data provided by ESRI, 2013.

The graph converts the dollar amounts into estimates of retail floor area by retail sector. Bars and numbers to the left—i.e., negative numbers—indicate sectors where there is more floor area in the West Side than the resident market can support. For example, there are enough excess grocery purchases to support another 7,500 square foot grocery store. That doesn't mean that a new grocery store will enter the market; a store of only 7,500 square feet is quite small in that sector. But it does indicate that there the West Side grocers seem to be faring relatively well.

This difference between local buying power and local retail sales reinforces West Side's role as something of a regional attraction. While its proximity to Downtown Greenville is a positive asset for West Side, it is also clear that the West Side can create leveraging opportunities for more economic growth in light of its ability to attract non-resident shoppers.

GROWTH POTENTIALS

Greenville is a growing area in terms of population, as illustrated earlier. Greenville County is projected by state officials to add more than 91,000 residents between 2010 and 2030, a 20 percent increase, and the metro area will expand by 16 percent. For revitalization to occur in the West Side of Greenville, at least a “fair share” of this growth needs to be captured in the West Side.

Other efforts to promote growth also are needed. Even without net new additions to the population, West Side residents need to achieve higher levels of formal education which is the best general indicator of the ability to earn more income over a lifetime. Higher incomes enable residents to invest in their homes, purchase better homes, and purchase more goods and services locally, thus encouraging revitalization and expansion of the retail sector. A better trained and educated workforce can also help to attract more and varied businesses to the West Side to take advantage of the local workers. But a better trained and educated workforce is also better positioned to take higher paying, more sustainable and career-oriented jobs in, say, downtown Greenville or elsewhere in the region.

POPULATION GROWTH

IMPLICATIONS

Let’s start, however, with population projections. The table to the right suggests important implications of the state-issued numbers.

- At the top, Greenville County is projected to add 90,000 to 95,000 residents in 20 years.
- Greenville City has historically captured 12 to 14 percent of the county’s population. If this continues, the city could add 10,800 to 13,300 residents in 20 years.
- Likewise, the West Side neighborhoods have generally captured 12 to 14 percent of the city’s population, which means its “fair share” of the city’s growth could be 1,300 to 1,860 net new residents over the next 20 years.
- With average household sizes in the range of 2.25 to 2.50 people, this would create a need for 580 to 740 net new housing units. (Net new excludes replacement of existing housing to the extent that such replacement is necessary and occurs.)
- Moreover, the increased buying power of the new residents, assuming incomes exceeding the median that prevails today, could increase the need for retail space in the West Side by 50,000 to 60,000 square feet.

West Greenville Projections: 20 Years	
	Net New Residents
Greenville County Population Projection <i>(Source: S.C. Budget and Control Board and analysis by DS)</i>	90,000 to 95,000
Greenville City (12%-14% of county)	10,800 to 13,300
West Side (12%-14% of city)	1,300 to 1,860
Average Household Size (2.25 to 2.50)	2.25 to 2.50
	Housing Units
Total Housing Units	4,040 to 4,200
Net New Housing Demand: West Side	580 to 740
	Net New Square Feet
Total Retail Space	215,000 to 225,000
Net New Retail Space	50,000 to 60,000

This retail projection, of course, excludes demand that might emanate from outside of the West Side. If the West Side exploits its apparent regional role by attracting even more retail to serve a larger market, it is too difficult to project that added floor area. It will be more a function of access, traffic flow, the quality of the retailing/service/entertainment developments that occur, and persistent marketing. It will be, therefore, less a function of local purchasing power.

ECONOMIC DEVELOPMENT AND LABOR FORCE DEVELOPMENT

If the West Side can position itself as a stronger regional location for retailing, it should also be able to do so for other forms of economic development. Adjacency to the growing downtown, excellent arterial roads, improving amenities in the West Side (e.g., Swamp Rabbit Trail, a new regional park), and a growing labor force both internally and throughout the county might be leveraged to attract a wide range of businesses, especially to the arterial road edges.

Perhaps more important to West Greenville than business attraction is the ability of residents to take and hold growth-oriented jobs in the Greenville area. The table to the right is reproduced from the South Carolina Department of Employment and Workforce's 2012 report "Greenville LWIA⁴ Workforce Report 2012." The table shows the occupations that were projected to be in greatest need between 2008 and 2018, the latest projection period available.⁵

Occupation	Estimated Employment (2008)	Projected Employment (2018)
Personal and Home Care Aides	1,433	2,236
Real Estate Sales Agents	1,001	1,378
Self-Enrichment Education Teachers	590	857
Pharmacy Technicians	648	838
Civil Engineers	604	799
Fitness Trainers and Aerobics Instructors	599	783
Paralegals and Legal Assistants	406	530
Personal Financial Advisors	334	448
Coaches and Scouts	276	351
Bakers	200	273
Veterinary Technologists and Technicians	175	238
Veterinarians	155	203
Financial Analysts	124	162
Food Batchmakers	69	110
Technical Writers	79	110
Medical Equipment Repairers	70	93
Operations Research Analysts	61	84
Athletic Trainers	60	77
Environmental Scientists and Specialists	34	49
Financial Examiners	21	27

⁴ LWIA means Local Workforce Investment Area which, in this case, is restricted to Greenville County alone. That said, Greenville County is the most populated county in South Carolina, so it is also the largest county-based economy.

⁵ The U.S. Department of Labor develops national industry and occupation projections every two years (even numbered years) with ten-year projections. These are published within two years after the base year (in this case 2008, published in in early 2010). The individual states typically use those reports to develop their own projections, but using the same base year. Thus, the time frame of

While the occupations on this table may be interesting, two findings of the LWIA report are important for the West Greenville Comprehensive Plan:

1. Many of the jobs projected to have numerous openings between 2008 and 2018 in Greenville County are jobs that have high turnover due to low wages.
2. Of the top 50 projected growing occupations by percent change:
 - 13 require a high school diploma or GED (26%)
 - 2 require less than a high school diploma or GED (4%)
 - 22 require a bachelor's degree or higher (44%)
 - 13 require an associate's degree or some kind of longer term postsecondary training (26%).

Recall from earlier that 69 percent of West Side residents have a high school diploma or less, compared to only four percent of the top growing jobs in Greenville County requiring that minimum of education.⁶ Meanwhile, just 12 percent of West Siders have bachelor's degrees or higher, while 44 percent of the fast growing occupations require that much education.

Conclusion: Increase the educational attainment of West Side residents. There are two primary ways to do so. One is to attract new residents with more education. This should certainly be a goal for all of Greenville because better educated individuals help to sustain higher quality neighborhoods. The other way is to help existing residents achieve greater levels of education and training. This calls for improved accessibility to schools, training programs, and related support services. It also calls for improved education systems within West Greenville to encourage younger people to obtain post-secondary degrees or apprenticeships that lead to better and more diverse opportunities for career-oriented and higher paying occupations.

That said, improved education and training should be accompanied by programs that retain such people in the West Side. It is one thing for residents to be able to obtain higher quality jobs, but the West Side itself is inadvertently diminished if such people move to other neighborhoods where, perhaps, housing conditions and other quality of life factors are perceived as better. The economic development capacity improvements of current residents should be accompanied concerted efforts to retain their incomes, skills, and stable families in the West Side.

the projections can appear limited. Latest available U.S. projections are for 2010-2020, but South Carolina has not yet published its 2020 projections.

⁶ This sharp contrast might be a bit misleading. Educational attainment includes all residents aged 25 or more. This, of course, includes all senior citizens and older members of the workforce. As time passes, younger generations tend to have higher educational attainment, so many of those in the 69% with only high school or lower educations may, in fact, not be members of the workforce. This percentage should decline as older residents pass away.

LAND USE PROGRAMMING

Emerging from this socio-economic analysis, which implies a certain amount of market-based opportunities for development and revitalization, are suggestions for “land use programming.” A land use program is simply a definition of the types of development that should be planned for in the West Side given realistic expectations of growth and change.

HOUSING: As noted earlier, net new residential housing should be anticipated in the range of **580 to 740 units**. Ideally, market conditions will encourage even more housing, but it is too early to predict such increases. It is better to position the West Side to capture its “fair share” of population growth before overly planning for even more growth. The analysis of this report would initially urge an emphasis on higher density forms of housing along the major corridors that principally wrap the West Side and/or link directly to the downtown job market.

Meanwhile, there are many substandard, lower value homes in the West Side that should be planned for renovation or replacement (no net increase, but net improvements in the quality of life). Plans for housing should be accompanied by sufficient land and related civic facilities to support the housing market, such as nearby parks, schools, places of worship.

RETAIL SPACE: This report indicates that “fair share” population and housing growth could support the addition of **50,000 to 60,000 square feet** of net new retail floor area. The market should determine exactly what kinds of retail businesses will occupy that space, but the West Side should be positioned to attract new and replacement retailers. Based on the West Side’s ability and natural location to attract regional shoppers—and possibly more retail space than noted above—the emphasis on retail should be in the Pete Hollis corridor.

OFFICE SPACE: Roughly 75 percent of the employment occupations showing the most promising growth in Greenville require some form of office space, including medical office space. At the county level, projections over ten years suggest a need for an additional 5.4 million square feet of office space. The City of Greenville captures about one quarter (24%) of all jobs in Greenville County, and the West Side contains about nine percent of the City’s employment (keeping in mind that part of the study area “bubble” overlaps with the Downtown/Main Street corridor). On that basis, planning should accommodate about **120,000 square feet of office** (5.4 million square feet x 24% x 9%) over the next ten years inside the West Side. Most of this space should be positioned near downtown in order to share a similar business environment, but 20,000 square feet or so can be located in the arterial corridors to accommodate personal service kinds of office users such as physicians, dentists, realtors, and so on. Almost all of this latter space can be co-located in retail shopping concentrations.

INDUSTRIAL SPACE: Given trends in economic sectors commonly associated with industrial space, it can be argued that Greenville County needs no additional industrial floor area. While there is growth in much of the logistics sector (transportation, warehousing, wholesaling, distribution), there will be decline in manufacturing and utilities jobs. This difference effectively means that no net new space is needed, though the abandonment of one industrial structure for another sector to occupy is usually not possible. Functions of each sector vary so dramatically (unless most office space users) that obsolete industrial space is typically removed in declining sectors and new space is constructed for growing sectors.

That said, growing industrial building sectors in the county would likely require about 400,000 square feet of industrial kinds of space—mostly logistics-oriented—creating an opportunity for about **10,000 square feet in the West Side** over the next ten years. BUT, much of the West Side has been defined over the years as an industrial center. That characteristics would suggest that the West Side could/should absorb a higher share of future industrial development in Greenville County.

On the other hand, a great deal of that heritage of industrial buildings is currently hindered by greater sensitivity to environmental (especially flooding) conditions, thus reducing the West Side's traditional role in Greenville's industrial sectors. Moreover, much industrial development requires large tracts for large buildings, trucks, and trains. And the industry prefers close and generally unfettered access (e.g., not through residential areas) to the interstate highway system. These latter conditions mitigate against a substantial amount of industrial additions on the West Side. So a good planning number remains about 10,000 square feet to accommodate smaller industrial kinds of users.