

Introduction

In preparation for the beginning of the GVL2040 comprehensive planning process, the City’s consulting team, czb, has developed a handful of preliminary insights that it believes may become important themes for exploration throughout the planning process. These insights, or “hunches,” were shared with the project steering committee at its June 11, 2019 meeting. The hunches are preliminary in nature, designed to be tested, vetted, and debated, and to prompt discussion. They should not be confused for finished analysis. In addition, further and more robust data analysis will take place later in the project.

Hunch 1: A changing economy and employment situation are at the root of recent change in Greenville.

The number of employed persons aged 16 and above has been growing across Greenville County, both inside the city (19% increase) and outside the city (25% increase). The fastest growth has been in the following sectors:

Greenville County Employment, Selected Sectors, 2000-2017

Industry Sector	Inside City % Change	Outside City % Change
Professional, scientific, management	89%	63%
Education, health, and social services	26%	68%
Arts, entertainment, hotel, food services	33%	67%

Data Source: US Census and American Community Survey Estimates

The number of residents employed in high-paying professional, scientific, and management occupations has increased faster inside the city than outside. The number of residents employed in other sectors has increased more slowly inside the city than outside. Education, health, and social services (sometimes called “eds and meds”) tend to be mid-wage jobs while arts, entertainment, hotel, and food services positions tend to be low-wage jobs, hovering at or just above the federal minimum wage of \$7.25/hour.

This suggests to the consulting team that high-earning workers in the Greenville area are increasingly concentrating inside the city as their residential location of choice, while the city is absorbing less than its share (based on population) of mid-wage and low-wage workers.

The gut feeling amongst Greenville residents may be that the city will, at some point, cease to be a place for middle and working class people.

Hunch 2: Greenville’s systems are strained in ways that are highly noticeable to current and long-time residents.

As one example, the number of jobs in Greenville has increased substantially in recent years, though the number of Greenville residents working in Greenville jobs has not.

Jobs in the City of Greenville, 2002-2015

Jobs	2002	2015	% Change
Total Jobs	81,525	104,626	28%
Living and Working in Greenville	10,163	10,675	5%
Commuting into Greenville	71,362	93,951	32%

Data Source: US Census Bureau, Center for Economic Studies

This suggests to the consulting team that the city’s economy has succeeded in adding jobs, but it is not housing the vast majority of workers in those new jobs. The result is a marked increase in commuting.

The gut feeling amongst Greenville residents may be that weekday commuting traffic has become unbearable.

Hunch 3: Greenville’s economy and quality of life are helping it to become an elite community.

Greenville’s level of educational attainment amongst the adult population (aged 25 years and older) has been rising at least since the turn of this century. This is attributable mostly to the increasing number of college educated adults, but the decline in the number of adults without a college degree has also played a role.

City of Greenville Educational Attainment (Population Aged 25+), 2000-2017

Highest Level of Education Achieved	2000	2017	% Change
Advanced Degree (more than a 4-year degree)	4,494	8,121	81%
4-year Degree	8,216	12,348	50%
No 4-year Degree	24,461	23,503	-4%

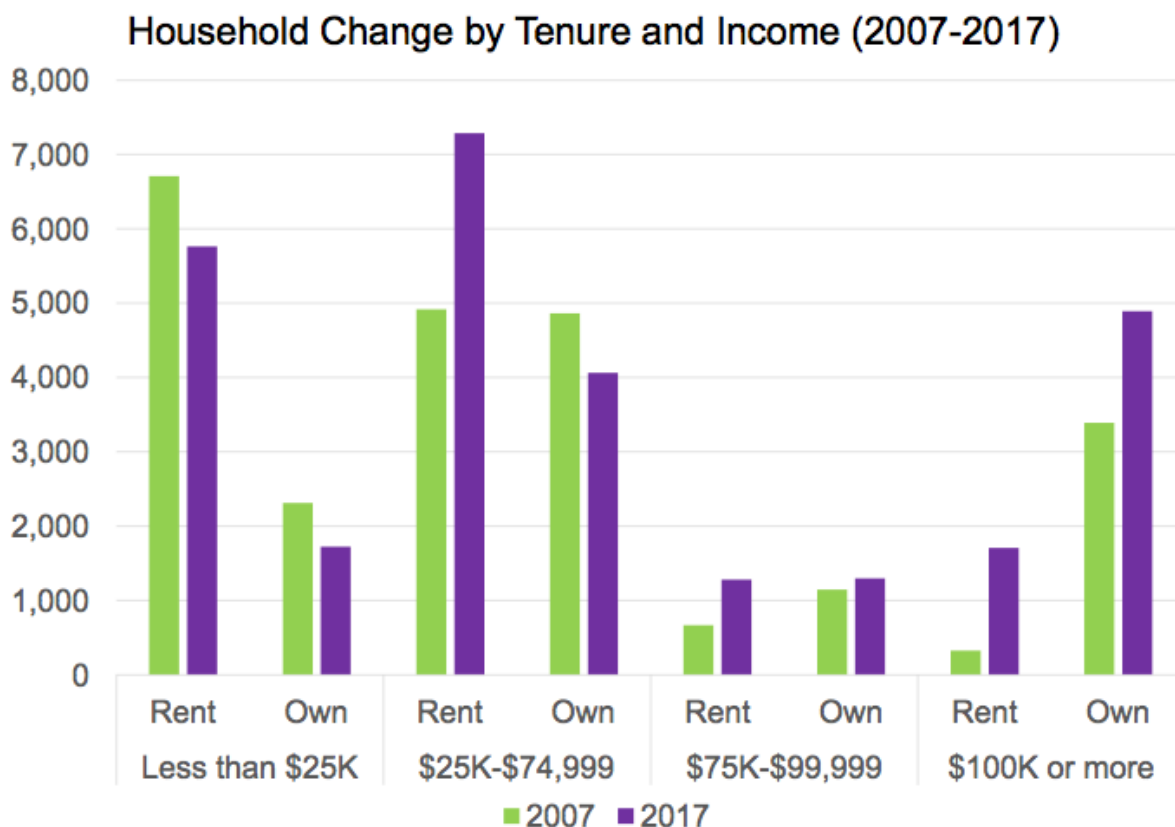
Data Source: US Census and American Community Survey Estimates

This suggests to the consulting team that Greenville has become competitive for highly educated households.

The gut feeling amongst Greenville residents may be that the city increasingly is not a place for blue collar or non-college educated people.

Hunch 4: The housing market is the one place where everyone feels the impact of economic changes.

House values and rents have been on the rise in Greenville and the numbers of homeowners and renter households have been changing differently at different income levels. The chart below illustrates the change in the number of households, by tenure (rent or own) and income level for the decade 2007-2017.



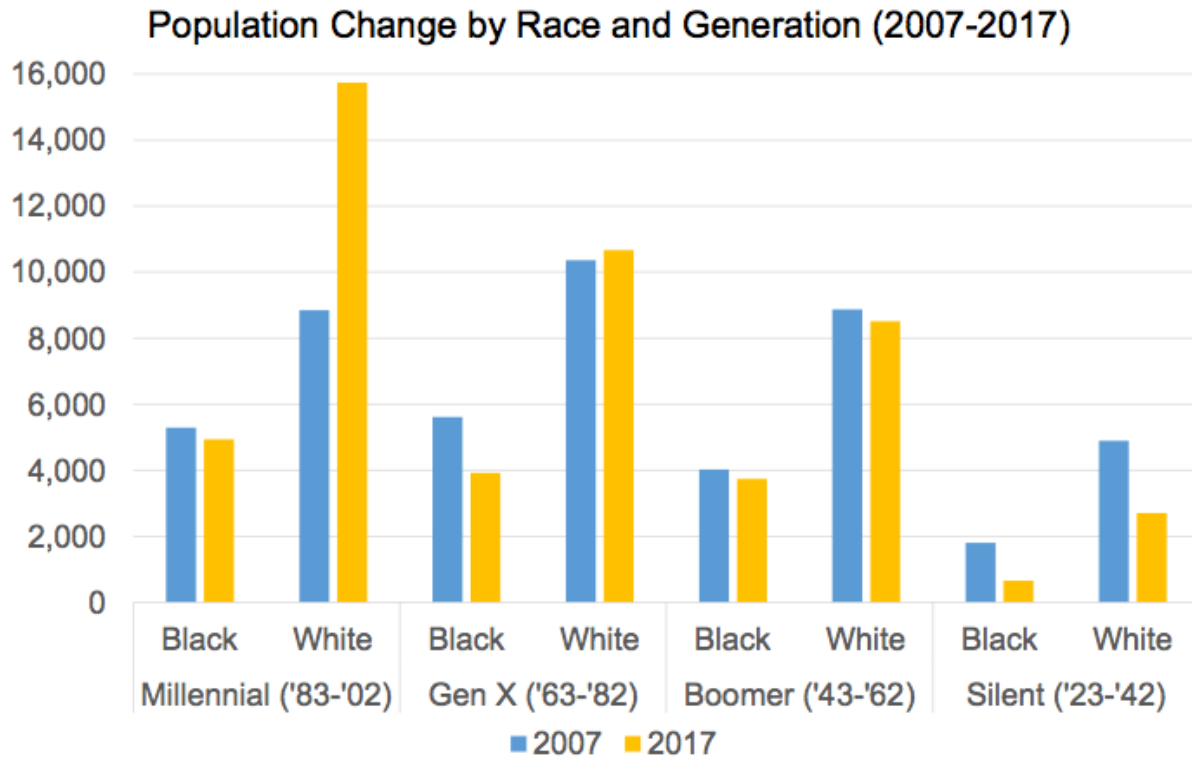
Data Source: American Community Survey Estimates

This suggests to the consulting team that lower-income households (those earning less than \$25,000 per year) are struggling to remain in Greenville, that middle income households (earning \$25,000 to \$74,999 per year) are increasingly more likely to be renters than owners, and that that higher earning households (\$75,000 per year or more) are increasing in number, both in ownership and rental units.

The gut feeling amongst Greenville residents may be that the city will soon be a place where only high-earning households can afford to live.

Hunch 5: Powerful demographic change is taking place.

Greenville’s African-American population is shrinking and getting older while the white population is growing and getting younger. This is mostly explained by recent migration patterns (moving in, moving out). The chart below illustrates population change by race and generation for the decade 2007-2017. (The definition of generations is approximate and driven here by the availability of data. These categories roughly align with other definitions of generations from commonly cited sources such as the Pew Research Center.)



Data Source: American Community Survey Estimates

What this suggests to the consulting team is that those leaving Greenville have been disproportionately African-American and those newly arriving in Greenville have been disproportionately white. There was no net African-American migration into Greenville during the decade in question. In particular, Gen X African-Americans left Greenville at a relatively high rate during the decade in question and the influx of young white people was substantial.

The gut feeling amongst Greenville residents may be that the city has become a playground of sorts for young white people and that the very idea of an African-American community may now be in question.