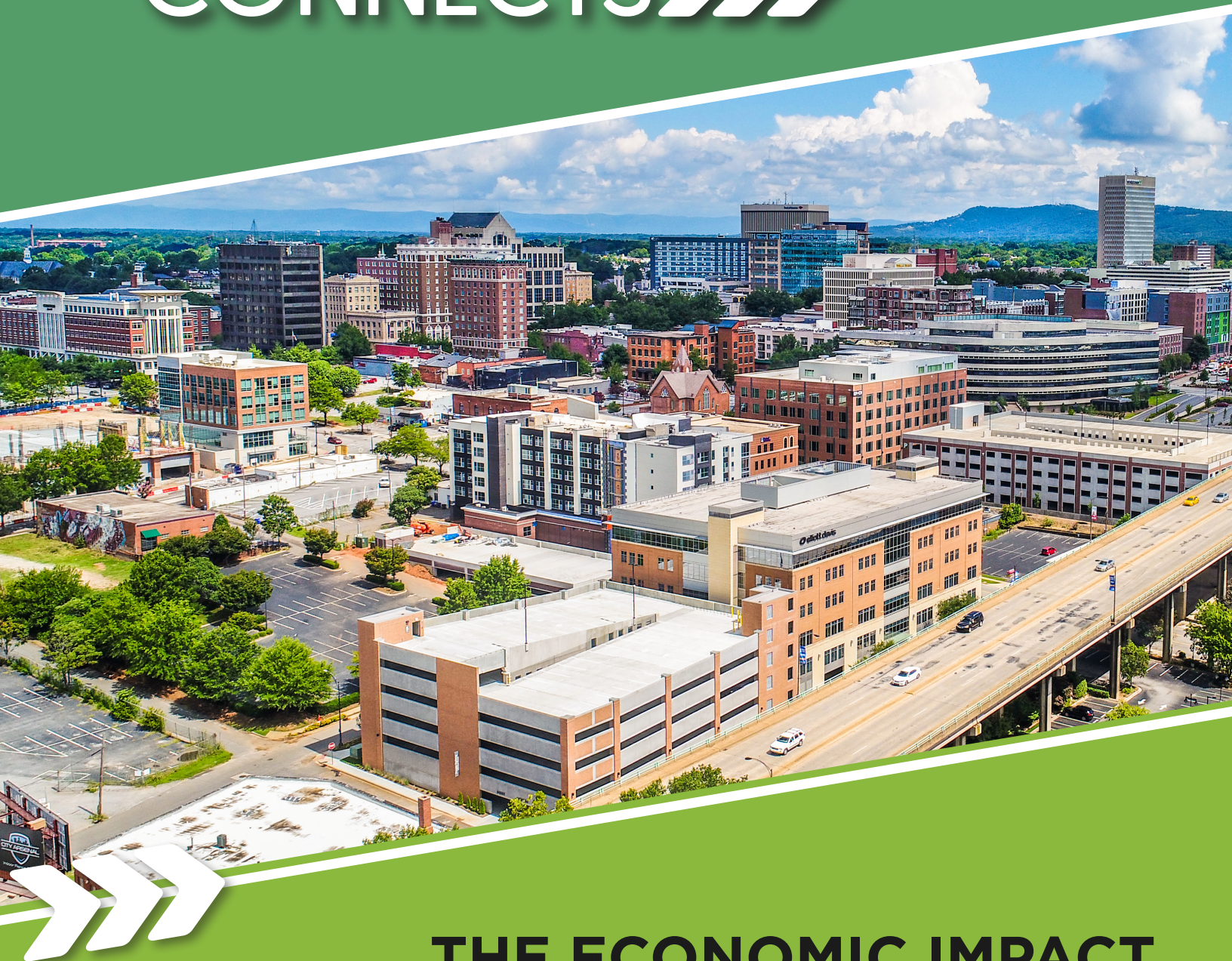


Greenville CONNECTS>>>



THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN

in conjunction with DR. JOSEPH C. VON NESSEN
THE UNIVERSITY OF SOUTH CAROLINA
FEBRUARY 2023

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



EXECUTIVE SUMMARY

Greenville County's economic and population growth over the last thirty years is astounding. This growth is mainly the result of proactive economic growth initiatives undertaken by Greenville County and South Carolina leaders. Additionally, Greenville County is the beneficiary of long-run changes in demographic trends in which a greater percentage of the U.S. population is moving to the Southeast region. The combination of these factors has driven Greenville County's employment, population, and income growth to consistently exceed nationwide growth since the year 2000.

One consequence of such growth is that it has also put increasing pressure on Greenville County to provide more services for its rapidly expanding population base, including an expansion of the public transit system, operated by the Greenville Transit Authority (GTA). GTA, in turn, partners with the City of Greenville to run the system under the name Greenlink. Such an expansion would provide two immediate benefits. First, it would increase the quality of life for many county residents by providing reliable transportation and access to many of the county's amenities. Second, this access would also increase the potential labor pool for Greenville County employers. One of the primary barriers to employment for South Carolinians that has been consistently documented in recent years is a lack of reliable transportation, which prevents access to prospective employers.

UP TO \$2
BILLION
IN NEW
ECONOMIC
ACTIVITY

Between 2010 and 2019, Greenville County's population grew by 16 percent, which added roughly 72,000 new residents. Greenlink has, as a result, developed a \$352 million, ten-year expansion plan - known as the Transit Development Plan (TDP) - with a specific goal of increasing service hours, routes, and route frequencies countywide. The purpose of this analysis is to provide a comprehensive assessment specifically documenting the economic impact of this expansion plan.

THE KEY FINDINGS OF THIS ANALYSIS ARE, AS FOLLOWS:

- ▶ The expansion of Greenlink is a ten-year process that began in December 2020 and is expected to continue through 2030. This expansion plan specifically consists of investments totaling \$352 million over ten years that would include all purchases related to infrastructure necessary for the expansion of Greenlink's service hours, routes, and route frequency. Expenditures consist primarily of the construction of an operations and maintenance facility, installation of new bus stops, and the purchase of additional vehicles.
- ▶ The TDP includes the implementation of expanded routes that would increase the potential labor pool for Greenville County employers by improving transit access. **An analysis of individuals currently living within the local census tracts that the new expansion routes will reach reveals that there are approximately 8,463 individuals between the ages of 25 and 54 who are neither working nor currently seeking employment. To the extent that a lack of transportation access is the reason these individuals are not part of the labor force, these 8,463 individuals provide an estimate for the number of new workers that Greenville County employers could potentially attract.**
- ▶ An increase in employment of between 25 percent and 75 percent of these individuals within the newly served census tracts would translate into the hiring of between 2,116 and 6,347 individuals. Under the assumption that these individuals would be working full-time for the average business in Greenville County, these new employment levels would generate a permanent increase in total economic activity of between \$671.9 million and \$2.0 billion annually and would support between 1,445 and 4,335 additional jobs via the economic multiplier effect.
- ▶ **To see the potential magnitude of this effect, note that an increase in economic activity of \$2.0 billion would represent a three percent increase in the total size of Greenville County's economy,** which is comparable to the size of a small industry. Such sizable gains clearly show the potential that the Greenlink expansion has to support long-run economic growth in the region.

3% POTENTIAL
GROWTH IN
GREENVILLE
COUNTY'S
ECONOMY

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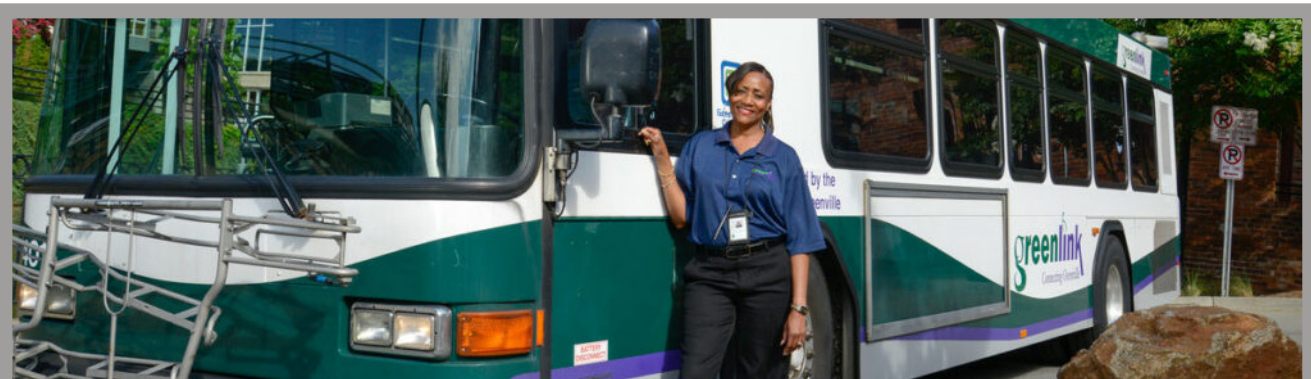
THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



THE KEY FINDINGS (CONTINUED):

- ▶ Greenlink estimates that approximately \$25 million in local taxes would be needed to operate the proposed expansion each year. **This implies that for every \$1 spent by Greenville County taxpayers, up to \$80 in new economic activity could be generated for the county as businesses gain access to a larger labor pool that will help them to expand and grow.**
- ▶ **The TDP capital investments would be expected to generate a total economic impact of approximately \$512 million in Greenville County by the year 2030, with an average of 206 jobs supported (directly or indirectly) per year between 2021 and 2030.** The largest impacts would occur between 2021 and 2024 during Phase I, at which time the annual economic impact of Greenlink's capital investments would total nearly \$66 million and support 263 jobs.
- ▶ The economic impacts resulting from Greenlink's infrastructure-related expenditures would be followed by more permanent impacts associated with Greenlink's expanded service operations. Between 2021 and 2030, this study estimates that Greenlink's annual operations-based economic impact will increase by 48 percent. **The annual current economic impact of Greenlink on Greenville County is estimated to be \$25.4 million, which is associated with 134 direct and indirect jobs and \$8.0 million in labor income for residents. With the expansion, this annual impact is projected to increase to \$37.7 million by 2030, which would support a total of 198 jobs along with \$11.8 million in labor income.**

6,347
POSSIBLE
NEW JOBS





SECTION I

INTRODUCTION

Over the past thirty years, Greenville County has consistently experienced one of the highest growth rates in South Carolina. This growth is mainly the result of proactive economic growth initiatives undertaken by Greenville County and South Carolina leaders to modernize and diversify the economy's industry base, as well as to aggressively recruit and develop an advanced manufacturing industry cluster.

The benefits of these growth initiatives can be easily observed through the considerable gains in total employment, population, and income levels since 1990. Greenville County's growth in all three categories generally exceeds that of South Carolina and the United States, particularly in population growth, where Greenville County grew 200 percent faster than the U.S. and nearly 40 percent faster than South Carolina.

Greenville County's population growth among its working age population compared to the rest of the state is also high. Between 2010 and 2019, Greenville County's population grew by 16 percent, which is approximately 72,000 residents. Such growth has put increasing pressure on the region to provide more urban amenities and services, including an expansion of Greenville's public transit system, operated by the Greenville Transit Authority (GTA). GTA, in turn, partners with the City of Greenville to run the system under the name Greenlink.

72,000+
NEW
RESIDENTS
IN LAST
DECADE

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THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



INTRODUCTION (CONTINUED)

The purpose of this research effort is to provide a comprehensive assessment documenting both the current economic impact of Greenlink as well as the potential economic impacts associated with its Transit Development Plan (TDP) as originally adopted by the Greenville Transit Authority Board of Directors in April 2018 and updated in May 2021. Such an expansion has the potential to generate sizable positive impacts for the county's economy that would result from three primary components: (1) a temporary increase in economic activity resulting from local capital investment towards the infrastructure necessary to expand Greenlink's service hours, routes, and route frequency; (2) a permanent increase in economic activity associated with the increased operations of Greenlink upon completion of the expansion process; and (3) improved access of residents to Greenville County businesses. This third component is especially important given the current U.S. labor shortage and the fact that lack of transportation is one of the primary documented employment barriers in South Carolina faced by individuals in 2023.

Section II of this study begins by highlighting the sizable economic growth that the Greenville metropolitan region has experienced over the last 30 years, which has generally outpaced both national and statewide averages and led to the need for additional transportation infrastructure and Greenlink's TDP. Section III then provides an overview of the current and projected economic impacts of the public transit system on the county. Section IV provides a brief conclusion.



SECTION II

ECONOMIC GROWTH IN GREENVILLE COUNTY AND THE NEED FOR INCREASED TRANSPORTATION INFRASTRUCTURE

THE EMERGENCE OF A MODERN, DIVERSIFIED ECONOMY

Over the past several decades, Greenville County has experienced significant economic growth that has largely outpaced that of South Carolina and the United States. This growth, in turn, has dramatically increased the local demand for transportation infrastructure that can service the larger population and worker base that has generated this new economic activity.

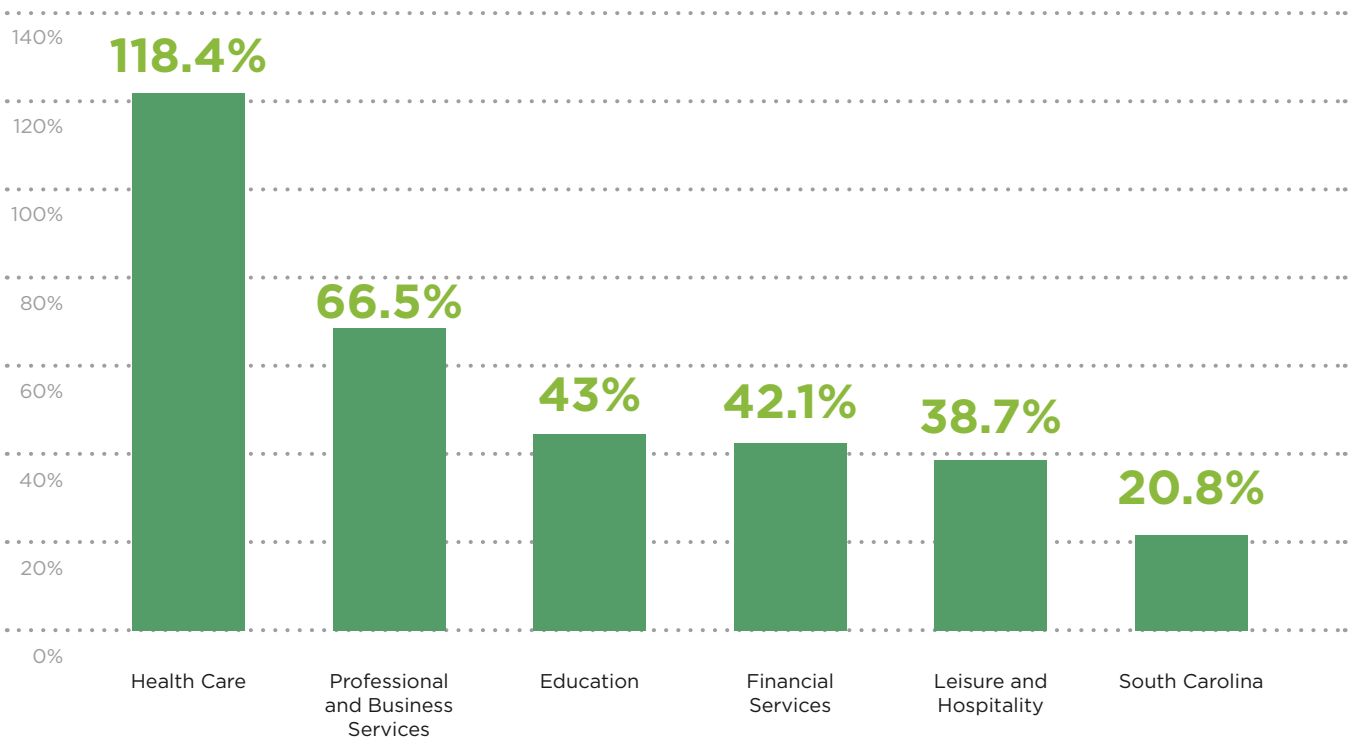
Greenville County's expansion has specifically come about as a result of an increasingly modernized and diverse economy. For example, in 2001 over 21 percent of private sector employment was concentrated in the manufacturing industry. By 2021, this had dropped to just over 12 percent. And while subsets of manufacturing – including the automotive industry – have continued to grow and expand, the industry sectors that have experienced the highest growth rates and have contributed the most to the Greenville County employment base throughout the 21st century are Health Care, Professional & Business Services, Education, Financial Services, and Leisure & Hospitality. These growth rates are specifically highlighted in **Figure 1** and represent a broad range of employers. Note, however, that Health Care stands apart as the overall leading industry sector. This is a result of two factors: (1) the rapid increase in the size of Greenville County's population base and (2) the aging of Greenville County's existing population base, which is part of a national demographic shift towards an older population as the Baby Boomers retire.

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



FIGURE 1: INDUSTRY SECTORS WITH HIGHEST RATES OF GROWTH IN GREENVILLE COUNTY, 2001-2021

Source: U.S. Bureau of Labor Statistics, QCEW



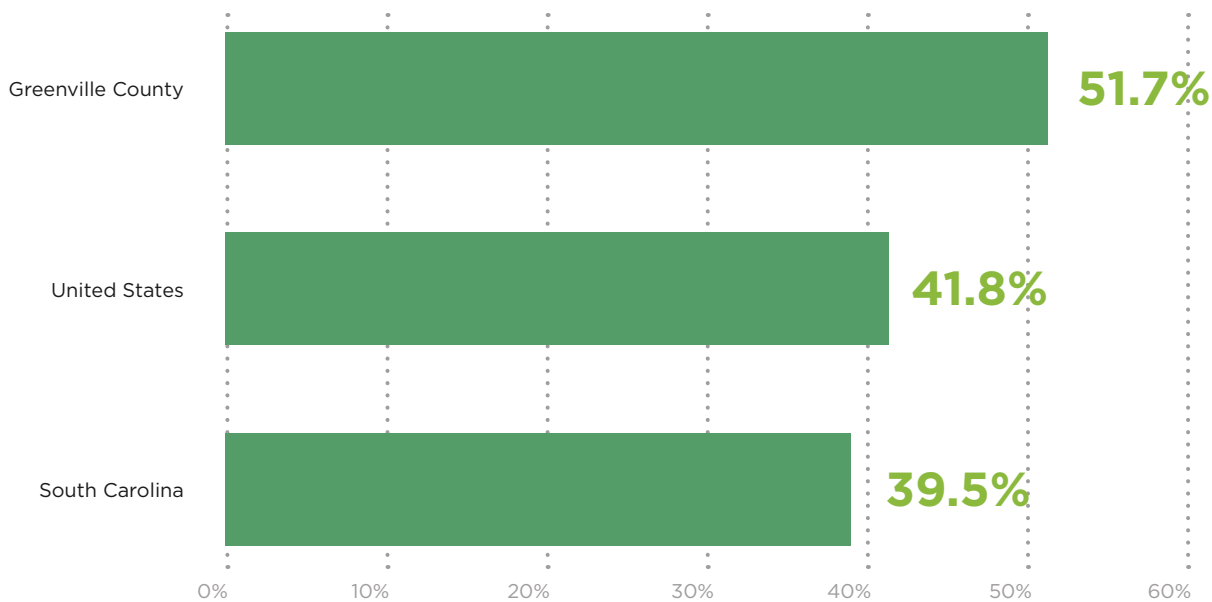
Quantifying the Practical Benefits of Economic Growth

The benefits of economic growth to a local region are typically measured through gains in employment, population, and income. Or put another way, from the perspective of an average resident, the benefits of a booming economy can be observed when job opportunities are plentiful, the region is growing, and wages are rising. By these measures, Greenville County has been generally outpacing South Carolina and the United States in recent decades.

First, consider employment growth. As **Figure 2** reveals, between 1991 and 2022, Greenville County's employment grew faster than South Carolina by more than 12 percentage points (51.7% vs. 39.5%). In addition, Greenville County's cumulative employment outpaced the United States, which grew at a rate of 41.8 percent from 1991-2022.

FIGURE 2: CUMULATIVE EMPLOYMENT GROWTH: 1991-2022

Source: U.S. Bureau of Labor Statistics, LAUS, NSA



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Not surprisingly, Greenville County's population gains kept up with employment growth. In this case – as **Figure 3** reveals, Greenville County outpaced South Carolina's population growth by 17.3 percentage points (64.1 vs. 46.8) and the national rate of population growth by 30.8 percentage points (64.1 vs. 33.3). Further, despite the aforementioned demographic shift that is leading to an older U.S. population base, Greenville County has been able to attract and retain a larger number of younger people between the ages of 25 and 54, which is typically considered the prime working age. **Figure 4** illustrates that as of 2021, 39.7 percent of Greenville County's population was between the ages of 25 and 54. This compares to 37.6 percent for South Carolina and 39.1 percent for the U.S.

FIGURE 3: CUMULATIVE POPULATION GROWTH SINCE 1990

Source: U.S. Census Bureau

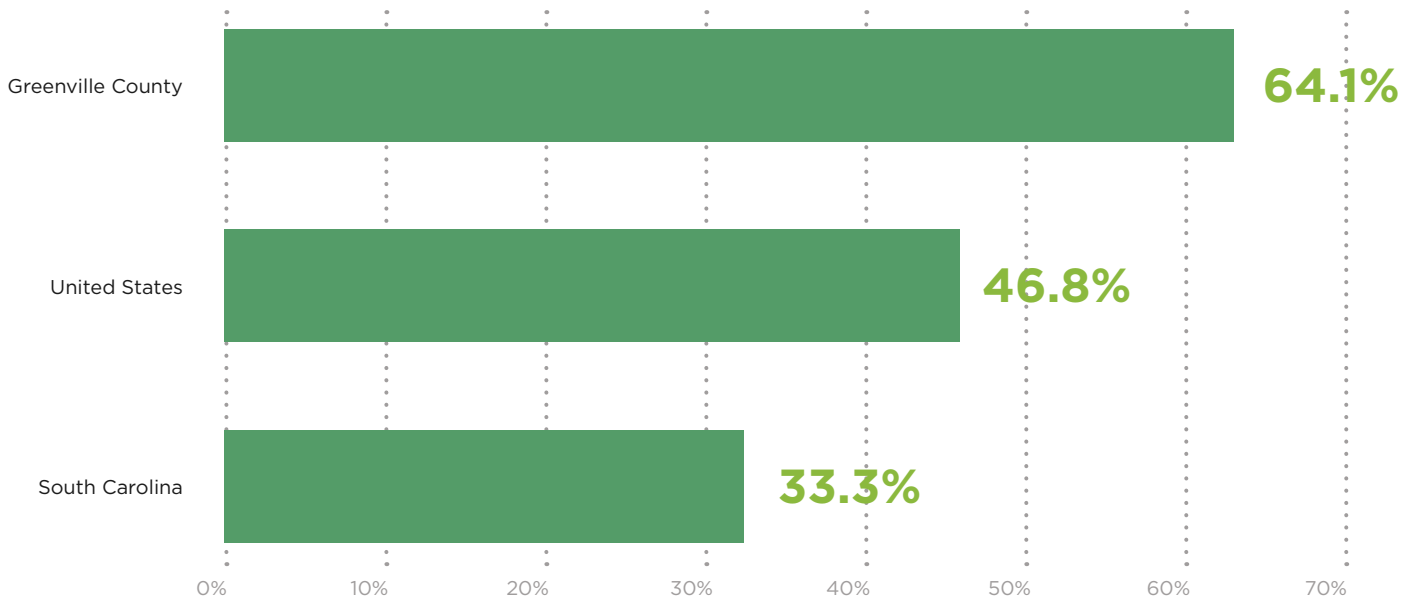
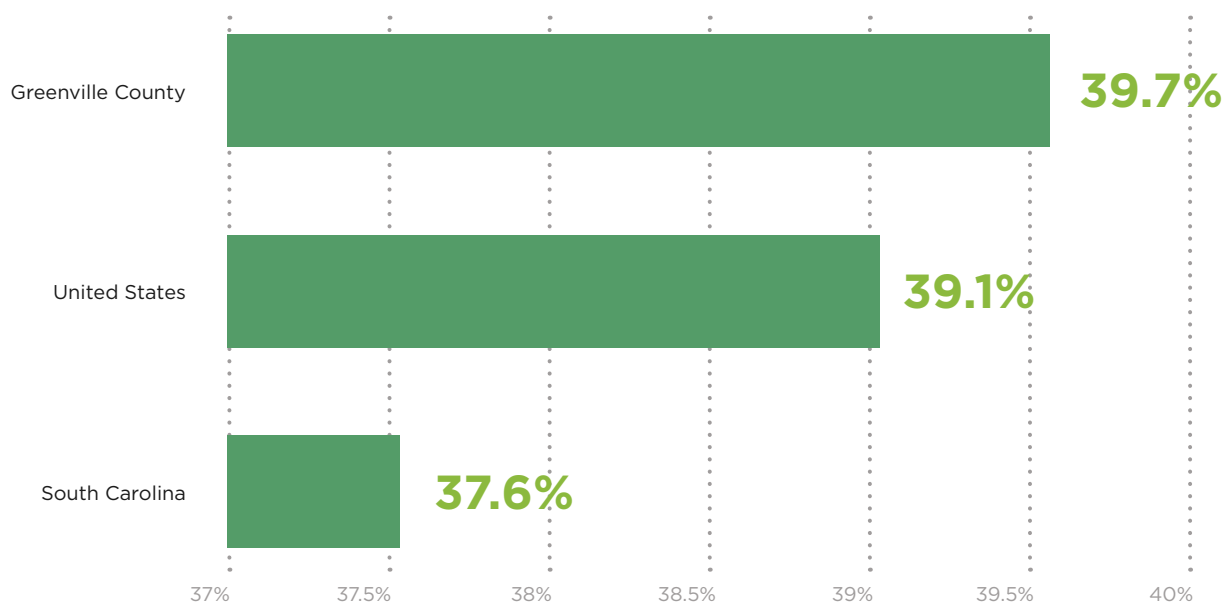


FIGURE 4: PERCENTAGE OF POPULATION AGED 25-54 AS OF 2021

Source: U.S. Census Bureau



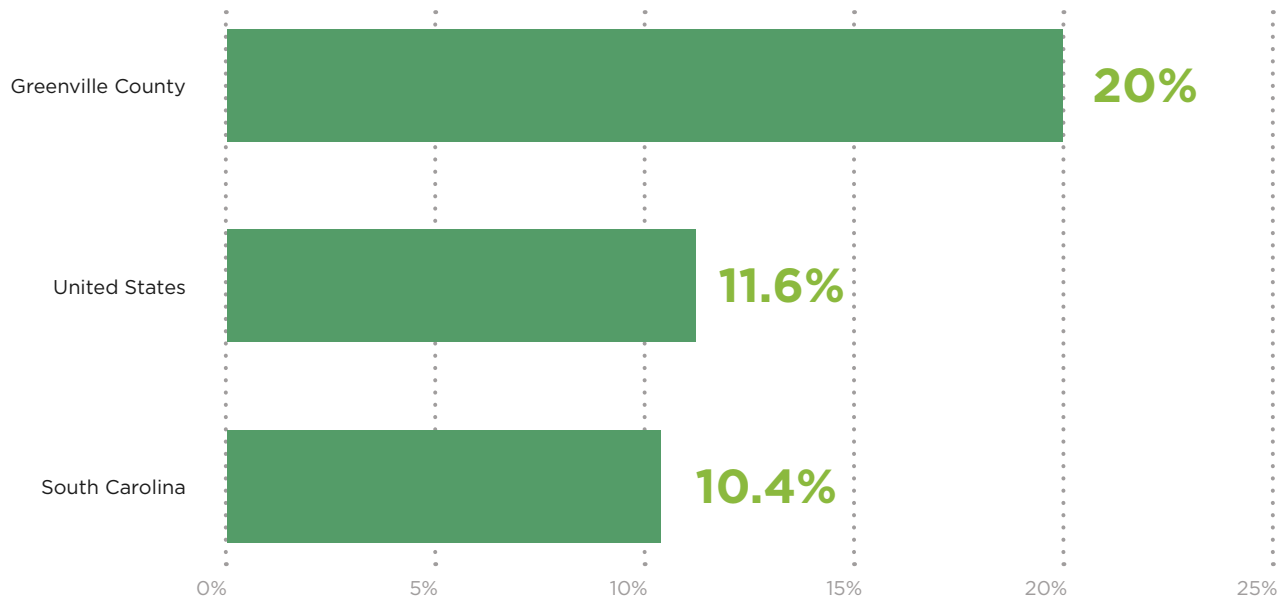
Finally, consider wage growth. **Figure 5** (next page) shows the large gains in median individual earnings of Greenville County residents from 2010-2021. Over that decade, Greenville County's median earnings increased at an inflation-adjusted rate of 20.0 percent, or nearly twice that of South Carolina (+11.6%) and the United States (+10.4%). These gains are a direct result of the high growth in employment and population in the county that, in turn, put upward pressure on wages.

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



FIGURE 5: GROWTH IN MEDIAN INDIVIDUAL EARNINGS, 2010-2021

Source: U.S. Census Bureau



Greenville County's strong growth trends as shown above are poised to continue throughout the next decade. The South Carolina Office of Revenue and Fiscal Affairs (RFA) projects that the total population in the state will likely grow by 12.6 percent between 2021 and 2035 while the population of Greenville County and the Upstate region are expected to grow 18.4 percent and 21.9 percent, respectively.



SECTION III

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT SYSTEM

IMPACTS RESULTING FROM LOCAL CAPITAL INVESTMENT

The expansion of Greenlink is a ten-year process that began in December 2020 and is expected to continue through 2030. As Table 1 denotes, this consists of three investment phases totaling \$352 million over ten years that would include all purchases related to infrastructure that are necessary for the expansion of Greenlink's service hours, routes, and route frequency. This primarily consists of expenditures related to the construction of a bus maintenance facility, the installation of new bus stops, and the purchase of additional vehicles.

**TABLE 1 - ANTICIPATED GREENLINK CAPITAL INVESTMENT
SCHEDULE IN GREENVILLE COUNTY**

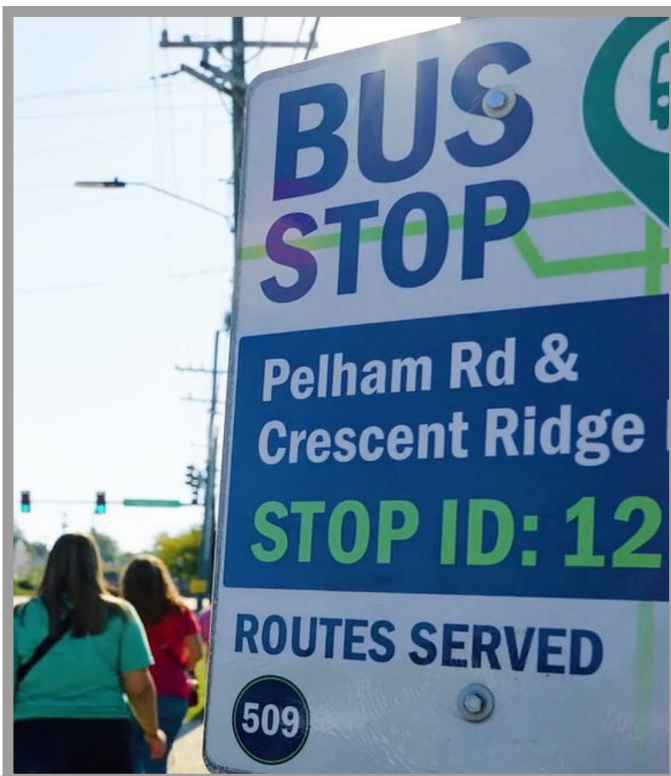
Year	Estimated <u>Annual</u> Investment	Estimated <u>Cumulative</u> Investment
2021-2024	\$45.0 million	\$180.0 million
2025-2029	\$30.5 million	\$332.5 million
2030	\$19.5 million	\$352.0 million

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



In order to determine the total economic impact on Greenville County arising from purchases associated with this new infrastructure and construction activity, a detailed structural model (known as an input-output model) of the Greenville County economy was utilized. This model contains specific information on economic linkages between different industries throughout the state. It provides the means to assess how an initial round of new spending activity (known as the direct effect) can lead to successive rounds of spending (known as the multiplier effect) resulting from both inter-industry linkages between local firms as well as increases in household spending. Economic impacts are measured using the following:

- ▶ Total Economic Impact (or Output): the dollar value representing the total contribution to overall economic activity
- ▶ Employment: the total number of full-time equivalent jobs that are needed to deliver the demand for the goods and services as measured by total economic output
- ▶ Total Labor Income: the total contribution to wages, salaries, and benefits affiliated with total employment



In order to ensure that the uniqueness of local economic dynamics is considered, the input-output modeling software *IMPLAN* is combined with other customized regional forecasting models that were developed. This allows for the inclusion of additional local data, industry knowledge, and ongoing economic growth trends.

The total economic impacts arising from all anticipated county-level purchasing activity associated with all infrastructure and construction associated with the Greenlink expansion in Greenville County appear in **Table 2**.

TABLE 2 – ECONOMIC IMPACT OF GREENLINK CAPITAL INVESTMENT IN GREENVILLE COUNTY

Years	Description	Annual Employment	Annual Labor Income	Annual Total Impact
Phase I 2021-2024	Direct Effect	155	\$9,918,802	\$45,000,000
	Multiplier Effect	108	\$6,692,221	\$20,445,859
	Total Impact	263	\$16,611,023	\$65,445,859
Phase II 2025-2029	Direct Effect	105	\$6,722,744	\$30,500,000
	Multiplier Effect	73	\$4,535,839	\$13,857,749
	Total Impact	178	\$11,258,583	\$44,357,749
Phase III 2030	Direct Effect	67	\$4,298,148	\$19,500,000
	Multiplier Effect	47	\$2,899,962	\$8,859,872
	Total Impact	114	\$7,198,110	\$28,359,872
Cumulative Totals		206	\$129,935,115	\$511,932,053

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



Phase I – the initial four years of Greenlink capital investment in Greenville County – takes place between 2021 and 2024 and will include a total investment value of \$225 million, or about \$45 million per year. Phase I specifically represents the most capital-intensive period of the Greenlink expansion due to the construction of the maintenance facility. All infrastructure and construction-related activities associated with this initial investment period are estimated to **generate an average annual economic impact of approximately \$65.4 million** for Greenville County. This total impact is also estimated to create an average of **approximately 263 jobs each year** that would pay approximately \$16.6 million in labor income annually.

The next five years (**Phase II**) will consist of further capital investment in which Greenlink will invest an additional \$152.5 million into the Greenville County economy, or about \$30.5 million per year. The additional infrastructure and construction-related activities associated with this capital investment would generate **an average annual economic impact of approximately \$44.4 million** for the Greenville County economy. This total impact, in turn, is estimated to create **approximately 178 jobs each year** that would pay \$11.3 million in labor income annually.

Phase III will take place in the year 2030 and will include \$19.5 million in capital investment. This final investment is expected to generate **an annual economic impact in 2030 of approximately \$28.4 million** for Greenville County along with **approximately 114 jobs** that would pay \$7.2 million in labor income annually.

In sum, all infrastructure and construction-related activities associated with the Greenlink expansion in Greenville County are estimated to generate a total economic impact of nearly \$512 million between 2021 and 2030. This level of economic activity will initially support an average of 263 jobs each year during the four-year peak investment period between 2021 and 2024, which will then scale back to 178 jobs between 2025 and 2029, and then to 114 jobs in 2030. **This implies that the average annual number of jobs that will be created across the full 10-year investment period is 206.**

PERMANENT IMPACTS RESULTING FROM ONGOING OPERATIONS

The economic impacts that result from all infrastructure and construction-related activities would be followed by more permanent impacts associated with the expanded business operations of Greenlink as it increases service hours, routes, and route frequency. Specifically, Greenlink anticipates scaling up its operations alongside the completion of each phase of capital investment.

As of January 2023, Greenlink maintains a workforce of 88 total employees with an accompanying annual payroll of \$4.6 million that supports all current service operations. These operations, in turn, currently generate a direct economic impact of approximately \$17.5 million each year for Greenville County. Upon completion of Phase I of capital expansion in 2024, the anticipated increase in service operations is projected to raise Greenlink's annual direct economic impact to \$23.1 million. Such an increase would also increase Greenlink's direct employment base to 116 with accompanying payroll of \$6.1 million. Similarly, following the completion of Phases II and III in 2030, Greenlink's annual direct economic impact is projected to increase to \$26.1 million as service operations expand even further, which would also increase Greenlink's direct employment base to 131 with accompanying payroll of \$6.9 million.

As with all infrastructure and construction-related activities, the total economic impacts on Greenville County arising from all current and projected operations of Greenlink can also be estimated. These impacts are broken down annually from 2021 to 2030 and are displayed in **Table 3**. Note that the direct impacts shown in **Table 3** represent a subset of the estimates previously described because all of the direct impacts driven by local tax dollars apportioned to Greenlink have been removed. Economic activity that directly arises from the spending of local tax revenue does not represent a net increase in economic activity for the county, but rather represents a transfer of economic activity from one sector to another.

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



TABLE 3 – ECONOMIC IMPACT OF GREENLINK OPERATIONS IN GREENVILLE COUNTY

Years	Description	Annual Employment	Annual Labor Income	Annual Total Impact
Phase I 2021-2024	Direct Effect	64	\$3,387,797	\$12,761,372
	Multiplier Effect	70	\$4,590,559	\$12,648,719
	Total Impact	134	\$7,978,356	\$25,410,091
Phase II 2025-2029	Direct Effect	84	\$4,446,484	\$16,749,300
	Multiplier Effect	92	\$6,025,108	\$16,601,445
	Total Impact	176	\$10,471,592	\$33,350,745
Phase III 2030	Direct Effect	95	\$4,298,148	\$18,942,661
	Multiplier Effect	103	\$6,814,110	\$18,775,443
	Total Impact	198	\$11,842,872	\$37,718,104
Cumulative Totals		161	\$96,114,256	\$306,112,193

The estimates illustrated in **Table 3** highlight how the total impact of Greenlink's operations in Greenville County is expected to continuously increase between 2021 and 2030 as the service hours, routes, and route frequency steadily expand. **The total economic impact of Greenlink on Greenville County is estimated to rise from its current value of \$25.4 million in 2023 to \$37.7 million by 2030.** This level of economic activity is also estimated to increase Greenlink's job creation from 134 jobs in 2023 to 198 by 2030, which will – in turn – increase the annual labor income generated from \$8.0 million to \$11.8 million. In sum, between 2021 and 2030, Greenlink's operations in Greenville County, including the expanded operations to be implemented throughout the 2020s, are expected to generate over \$306 million in total, new economic activity for Greenville County, which will support a total of 198 permanent jobs by the year 2030.

When combining the economic impacts associated with both the infrastructure and construction-related capital investment alongside all ongoing operations, the cumulative economic impact of Greenlink on Greenville County by the year 2030 is projected to total over \$818 million. This impact represents the sum total of all economic activity supported (directly or indirectly) by Greenlink between 2021 and 2030. Figure 6 summarizes these cumulative impacts.



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THE ECONOMIC IMPACT OF THE

... GREENLINK TRANSIT DEVELOPMENT PLAN



FIGURE 6 – GREENLINK’S ESTIMATED CUMULATIVE ECONOMIC IMPACT IN GREENVILLE COUNTY

Note: Estimates listed in millions

Increasing the Labor Pool for Greenville County Employers

The current expansion of Greenlink’s services in Greenville County includes the implementation of expanded routes that will increase the potential labor pool for Greenville County employers by improving transit access to Greenville County.

More specifically, this expansion will consist of adding 15 new routes that would likely expand public transportation access to 32 new census tracts in Greenville, Spartanburg, and Pickens counties. It is estimated that the new planned routes will reach one new census tract in Spartanburg County; four new census tracts in Pickens County; and 27 new census tracts in Greenville County. A full list of the newly served census tracts can be found in **Appendix A**. Some of the major destinations included in the proposed new routes include, but are not limited to:

- ▶ Dunean Plant
- ▶ Carolina Academy
- ▶ Michelin PRIME
- ▶ Walmart at Easley Town Center
- ▶ Downtown Easley
- ▶ Greenville-Spartanburg International Airport

An analysis of individuals currently living within the 32 new census tracts that the Greenlink expansion reaches can help to illustrate which residents would most likely benefit from the expanded routes. **Table 4** summarizes estimates of the total population, labor force, and the number of individuals not currently in the labor force across all 32 census tracts.

TABLE 4 – CHARACTERISTICS OF RESIDENTS IN THE 32 NEWLY SERVED CENSUS TRACTS

Economic Metric	Number of Residents Aged 16+	Number of Residents Aged 25-54
Total Population	107,794	53,723
Labor Force	68,720	45,260
Not in Labor Force	39,074	8,463

There are approximately 107,794 current residents in the expanded service region, with about half (53,723) being between the ages of 25 and 54. This age range is considered to be the “prime working age” and thus represents the age group most likely to take advantage of the Greenlink expansion for new employment opportunities. Of these 53,723 individuals, approximately 84.2 percent (45,260) are currently in the labor force – meaning that 84.2 percent of the population between ages 25 and 54 are either already working or are currently looking for work.

Conversely, this also means that 15.8 percent – or 8,463 individuals – are not in the labor force.

Thus, within the 32 new census tracts that the Greenlink expansion will provide access to, there are approximately 8,463 individuals between the ages of 25 and 54 who are neither working nor currently seeking employment. To the extent that lack of transportation access is the reason these individuals are not part of the labor force already, these 8,463 individuals provide an estimate for the number of new workers that Greenville County employers could potentially attract. Given that a lack of transportation access is often cited as one of the primary employment barriers in South Carolina, the Greenlink expansion could help many of these individuals.

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



In order to estimate the potential economic impact associated with an increase in employment among these 8,463 residents, two hypothetical scenarios were estimated in which it is assumed that 25 percent and 75 percent of these residents become employed in Greenville County. **Tables 5 and 6** document the estimates associated with these two scenarios.

TABLE 5 – ECONOMIC IMPACT OF 25 PERCENT EMPLOYMENT EXPANSION

	Employment	Labor Income	Economic Output
Direct Effect	2,116	\$132,095,331	\$396,971,319
Multiplier Effect	1,445	\$107,548,115	\$274,883,837
Total Impact	3,561	\$239,643,446	\$671,855,156

TABLE 6 – ECONOMIC IMPACT OF 75 PERCENT EMPLOYMENT EXPANSION

	Employment	Labor Income	Economic Output
Direct Effect	6,347	\$396,223,567	\$1,190,726,351
Multiplier Effect	4,335	\$322,593,520	\$824,521,604
Total Impact	10,682	\$718,817,087	\$2,015,247,955

An increase in employment of between 25 percent and 75 percent of individuals within the 32 newly served census tracts translates into the hiring of between 2,116 and 6,347 individuals. Under the assumption that these individuals work full-time for the average business in Greenville County, these new employment levels would generate a permanent increase in total economic activity of between

\$671.9 million and \$2.0 billion annually and would support between 1,445 and 4,335 additional jobs via the economic multiplier effect. **To see the potential magnitude of this effect, note that an increase in economic activity of \$2.0 billion would represent a three percent increase in the total size of Greenville County's economy. Such sizable gains clearly show the potential that the Greenlink expansion has to support long-run economic growth in the region.**

SECTION IV

CONCLUSION

As a result of the consistently strong employment and population growth that Greenville County has experienced in recent years, a need has arisen for Greenville County to provide more urban amenities and services for this population base – including an expansion of the Greenlink public transit system. As such, Greenlink is currently executing a ten-year expansion plan that began in 2021 and will ultimately total \$352 million in capital investment that will significantly expand Greenlink's service hours, routes, and route frequency.

This study estimates that between 2021 and 2030, all infrastructure and construction-related expenditures associated with Greenlink's expansion will generate a total economic impact of approximately \$512 million in Greenville County, with an average of 206 jobs supported (directly or indirectly) per year. These impacts would, in turn, then be followed by more permanent impacts associated with Greenlink's expanded service operations. By 2030, Greenlink's annual economic impact arising from its ongoing operations is projected to increase by 48 percent, or from its current annual impact of \$25.4 million to \$37.7 million.

THE ECONOMIC IMPACT OF THE GREENLINK TRANSIT DEVELOPMENT PLAN



The expansion of Greenlink's existing routes will also increase the potential labor pool for Greenville County employers by improving transit access to county residents. Approximately 8,463 individuals between the ages of 25 and 54 who are not currently in the labor force are estimated to be living in the new census tracts that the Greenlink expansion routes will reach. To the extent that a lack of transportation access is the reason these individuals are not part of the labor force, these individuals provide an estimate for the number of new workers that Greenville County employers could potentially attract. **If between 25 percent and 75 percent of these individuals were to eventually become employed full-time, this would generate a permanent increase in total economic activity for Greenville County of between \$671.9 million and \$2.0 billion annually. This latter estimate would represent a three percent increase in the total size of Greenville County's economy.**



**APPENDIX A –
CENSUS TRACTS IN
WHICH GREENLINK
EXPANSION SERVICE
WILL ACCESS**

Greenville County	Pickens County	Spartanburg County
13.02	106.04	232.02
15.01	108.02	
18.03	108.04	
20.03	109.03	
22.02		
23.03		
25.03		
25.04		
25.05		
25.06		
26.09		
26.11		
27.01		
28.05		
28.12		
28.18		
28.20		
29.05		
31.01		
31.03		
34.01		
35.00		
36.01		
36.02		
38.03		
39.05		
39.06		

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