

# GREENVILLE LWIA WORKFORCE REPORT 2012





The *Greenville Workforce Report* is published by the Labor Market Information (LMI) Department of the South Carolina Department of Employment and Workforce. The information and analyses provided in this publication are based on data collected from sources throughout South Carolina and the United States.

About SC DEW and LMI:

The Labor Market Information Department compiles and publishes employment statistics, job forecasts, wage data, demographics, and other labor market information to help public and private organizations, researchers, and others better understand today's complex workforce.

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## EXECUTIVE SUMMARY

*“Once the textile capital of the world, Greenville was forced to innovate itself out of a dying industry. With a growing list of over 100 Fortune 500 companies and 200 foreign-based firms calling Greenville home, you can feel the hard-earned momentum.”*

*From <http://lifeingreenville.com/work/prosperous>*

That “hard-earned momentum” is still going in the Greenville area. Current economic conditions include the top employing industry: Administration and Support and Waste Management and Remediation Services. This is the industry that, for the most part, supports manufacturing through its temporary employment agencies subsector. Aging Baby Boomers have added to the strength of the Healthcare and Social Assistance industry, landing it as the second largest industry.

The momentum includes an unemployment rate that is consistently below the state rate, and an overwhelming majority (93 percent) of businesses considered small businesses (up to 49 employees).

So how does the area feed this demand for skilled workers? With a population that is steadily increasing (including in-migration of highly educated people from other states) and a higher rate of citizens with advanced education (some college, bachelor’s degrees, and master’s degrees).

Employers are indicating that they need more workers with backgrounds in business and management, along with marketing and sales. They are always looking for that potential employee that has the soft skills to be an efficient addition to the company.

For the most part, the supply and demand data show that the streams are even, but there are some areas where minor revisions could help better align resources and needs. The area needs more students (high school and post-secondary) to train for jobs in business and in sales. It needs fewer students training in healthcare, education, and social services. It needs higher education to offer more training in marketing and sales. Soft skills are on the wish list for every employer, so they can have a better chance of finding an employee who can be an asset to the company.

The Greenville LWIA is more fortunate than most of the areas in the state with its large manufacturing and manufacturing support sectors, its cluster of worldwide and national headquarters, and its high level of education of the residents. The future looks bright as the economy continues to recover from the recession and both employers and consumers have more confidence in the market.

## INTRODUCTION

Greenville is located along Interstate Highway 85, known as the “Boom Corridor” for its rising population and commercial importance. Greenville is located at the midpoint between Atlanta and Charlotte. The Greenville Local Workforce Investment Area (LWIA) is composed entirely of Greenville County.

For the Greenville LWIA and the workforce system, 2012 has been a year of transition and renewed commitment to ensuring that every investment and program strengthens the workforce and economy.

The economic changes this year in the Greenville LWIA demonstrate the shifting needs of employers and employees. Cultivating an understanding of the workforce allows us to respond to anticipated future needs. Analyses help to identify the gap between what the workforce has in the way of talent and skills (supply), and what it may need in the future (demand).

The purpose of the Greenville LWIA Workforce Report is to present a comprehensive view of the status of Greenville County’s economy and workforce. The report includes an analysis of Greenville LWIA’s workforce, industries, economic climate, and factors that will affect all three. Forecasts will be made for the workforce, industries, and the economy.

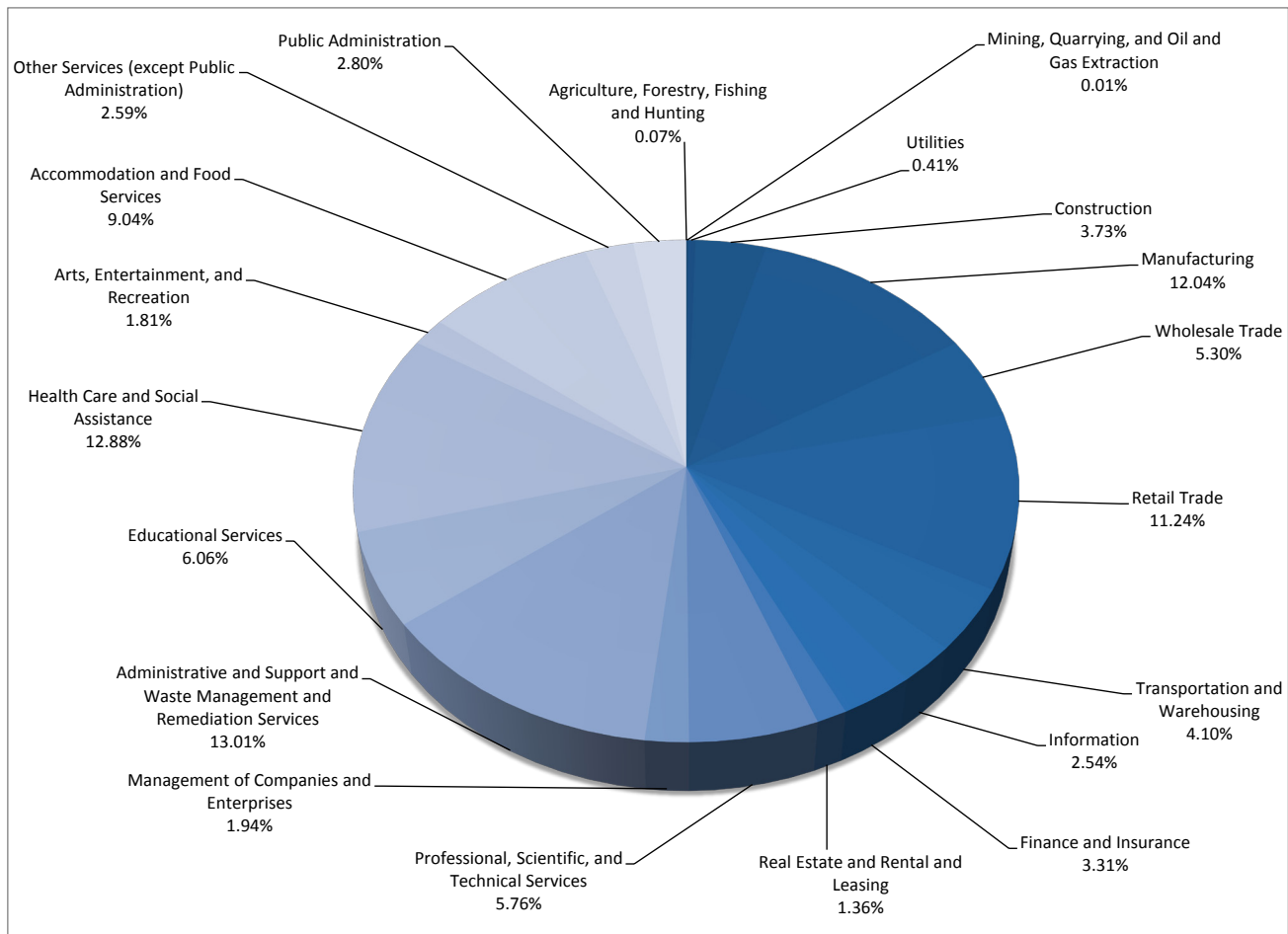




# ECONOMIC DISCUSSION: A CURRENT PICTURE OF THE WORKFORCE

## EMPLOYMENT BY INDUSTRY

Figure 1: Greenville LWIA Employment By Industry - 3rd Quarter 2012



Source: US Bureau of Labor Statistics (BLS), SC Department of Employment & Workforce (SCDEW), Quarterly Census of Employment and Wages (QCEW)

Greenville LWIA has a fairly diverse economy. Because of the area's concentration of manufacturing companies (both historically and currently), manufacturing and those that supply it (ex. Administration and Support and Waste Management and Remediation Services) are flourishing. (Note that "Admin./Waste Svcs." includes temporary employment agencies, call centers, janitorial and landscaping companies, and waste disposal.)

As is the case in most areas of the state, the population is getting older and requiring more health care. This plus the Greenville area being attractive to retirees drives employment in the Health Care and Social Assistance sector. The location near the mountains and near such destinations as Asheville, North Carolina and the Blue Ridge Parkway adds to the tourism industry, and this shows in the Accommodation and Food Services sector.

## LOCATION QUOTIENT

A location quotient is a useful tool for determining the concentration of workers in a given area. Location quotients compare the regional share of employment in a particular industry to the national share of employment in the same industry. The resulting quotient reveals the degree of regional specialization or concentration in an industry and provides insight into what makes the area unique

in comparison to the national average. A location quotient of 1.0 means the concentration of jobs in that industry matches the nation's value. Location quotients higher than 1.0 indicate the level of specialization the area has in particular sectors. Lower quotients can indicate a possible area that could be expanded.

**Figure 2: Notable Greenville LWIA Location Quotients - 2011**

| Industry                                       | LQ  | Industry                                     | LQ  |
|--|-----|--|-----|
| Textile Mills                                  | 6.4 | Other Information Services                   | 0.4 |
| Textile Product Mills                          | 4.1 | Private Households                           | 0.4 |
| Plastics & Rubber Products Manufacturing       | 3.3 | Securities, Commodity Contracts, Investments | 0.4 |
| Machinery Manufacturing                        | 3.3 | Computer & Electronic Product Manufacturing  | 0.3 |
| Administrative & Support Services              | 2.1 | Wood Product Manufacturing                   | 0.3 |
| Chemical Manufacturing                         | 2.1 | transit & Ground Passenger Transportation    | 0.2 |
| Telecommunications                             | 2.0 | Utilities                                    | 0.2 |
| Support Activities for Transportation          | 1.8 | Primary Metal Manufacturing                  | 0.1 |
| Electrical Equipment & Appliance Manufacturing | 1.7 | Beverage & Tobacco Product Manufacturing     | 0.1 |
| Truck Transportation                           | 1.6 | Air Transportation                           | 0.1 |

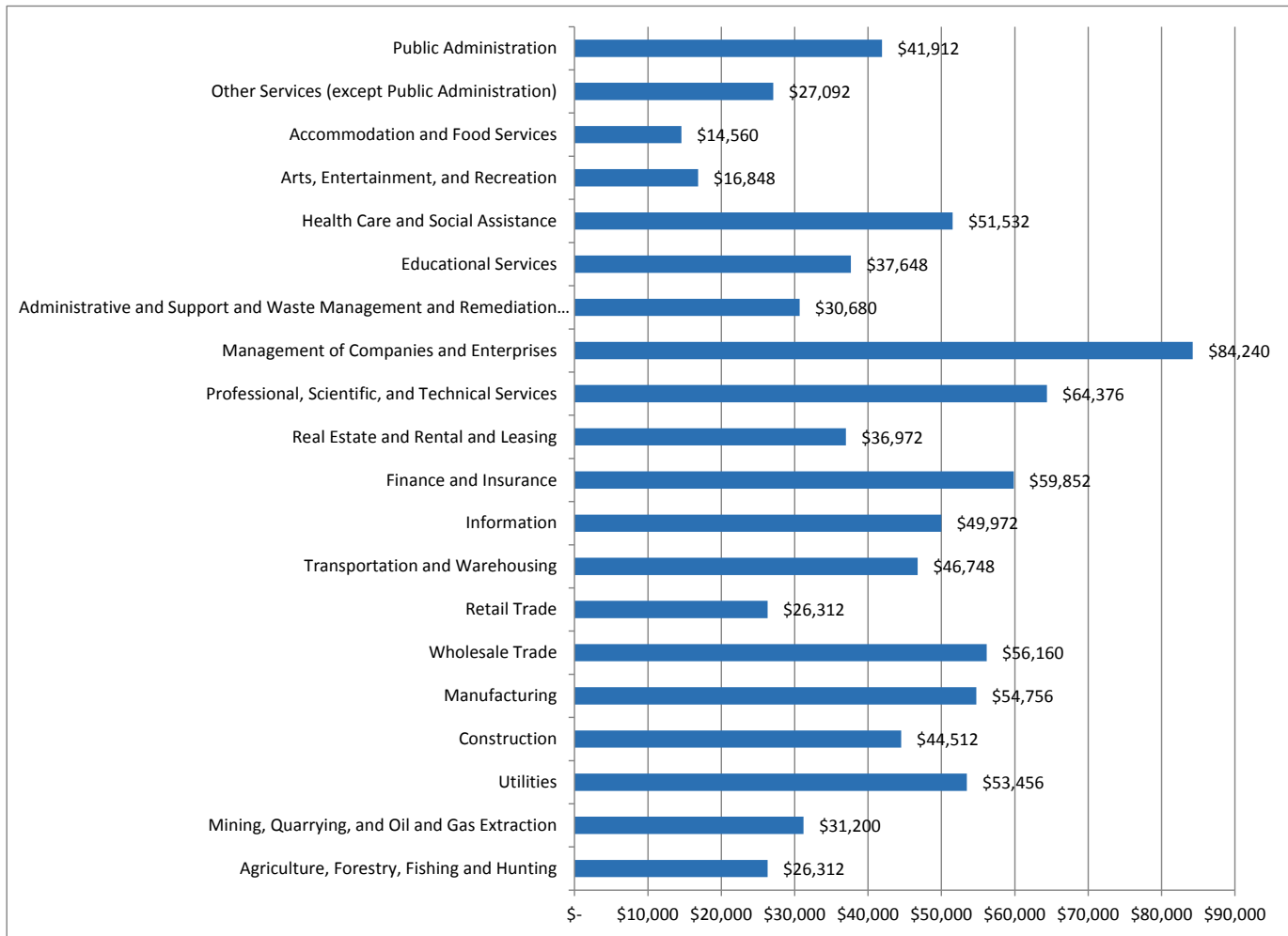
Source: US Department of Labor, Bureau of Labor Statistics - [http://data.bls.gov/location\\_quotient](http://data.bls.gov/location_quotient)

Not surprisingly, manufacturing is among the most concentrated of industries in this area. With a location quotient of 6.4, Textile Mills stands out as a highly-focused sector. Textile Mill companies transform a basic fiber into a product like yarn or fabric. The second highest location quotient is Textile Product Mills at 4.1. Companies in the Textile Product Mills subsector use the yarn or fabric to make other textile products but not clothes. Other manufacturing sectors are also very concentrated in this area include: Plastics and Rubber, Machinery, Chemical and Electrical Equipment and Appliance.

### *AVERAGE ANNUAL WAGE BY INDUSTRY*

The large number of manufacturing companies in the Greenville LWIA is reflected in the wages, especially for people involved in managing these companies. There are several worldwide headquarters located in this area, so many high-level managers call Greenville home. The highest annual wage is in Management of Companies, followed by Professional and Technical Services, and Finance and Insurance. Due to the low skill needed for many jobs in the Accommodations and Food Service sector, that industry has the lowest annual wage.

**Figure 3: Annual Average Wage by Industry - 3rd Quarter 2012**



Source: BLS, SCDEW, QCEW

### *OCCUPATIONAL EMPLOYMENT*

When examining the current occupational employment in the area, one can observe the top 20 occupations are low-skill, low-pay jobs. These jobs, like Cashiers, Waiters and Waitresses, and Janitors, have high turnover. These are not necessarily the most robust jobs as far as wages, but they are jobs.

Figure 4 lists occupations, like Registered Nurses, Sales Representatives, and General Managers, that pay a higher wage. The large manufacturing base in the Greenville LWIA is reflected in this list of top occupations: Team Assemblers, Laborers and Material Movers, General Managers, Sales Representatives, and Maintenance and Repair Workers all found in manufacturing companies.

**Figure 4: Top 20 Occupations with Wages - 2012**

| Occupational Title   | Total Employment | Hourly Average Wage (\$) |
|--|------------------|--------------------------|
| All Occupations  | 298,560          | 19.32                    |
| Team Assembler   | 11,940           | 13.63                    |
| Retail Salespersons  | 10,020           | 12.17                    |
| Laborers & Freight, Stock, & Material Movers, Hand                         | 7,470            | 11.37                    |
| Cashiers   | 7,190            | 8.93                     |
| Customer Service Representatives   | 6,910            | 15.58                    |
| Registered Nurses  | 6,660            | 28.66                    |
| Janitors & Cleaners, Except Maids & Housekeeping Cleaners                  | 6,330            | 9.46                     |
| Combined Food Preparation & Serving Workers, Including Fast Food           | 6,170            | 8.30                     |
| Waiters & Waitresses   | 5,660            | 8.47                     |
| Office Clerks, General   | 5,570            | 12.52                    |
| General & Operations Managers  | 4,230            | 53.63                    |
| Secretaries & Admin. Assistants, Except Legal, Medical & Executive         | 4,230            | 14.19                    |
| Heavy & Tractor-Trailer Truck Drivers                                      | 3,970            | 18.52                    |
| Bookkeeping, Accounting, & Auditing Clerks                                 | 3,890            | 16.09                    |
| Sales Representatives, Wholesale/Mfg. (Exc. Technical/Scientific Products) | 3,780            | 27.92                    |
| Receptionists & Information Clerks   | 3,700            | 11.70                    |
| Stock Clerks & Order Fillers   | 3,640            | 11.90                    |
| Nursing Assistants   | 3,520            | 10.65                    |
| Maintenance & Repair Workers, General                                      | 3,250            | 18.19                    |
| First-Line Supervisors of Office & Administrative Support Workers          | 3,120            | 22.33                    |

Source: BLS, SCDEW, Occupational Employment Statistics (OES)

## SKILLS DATA

Employers are beginning to see that a person's skills, in addition to their education, may help in determining who to hire. Many times the degree is not as important as the skills gained through specialized training and/or experience. In order to be able to determine the current level of skills in the area, the top 50 current occupations by employment are presented, and assigned a low, middle, or high skill designation to that occupation. The definitions for those skills levels are:

- **LOW:** No high school or GED, or high school/GED with less than one year experience and no on-the-job-training (OJT), or short-term OJT
- **MIDDLE:** High school/GED with one year experience, or moderate OJT, or long-term OJT, or apprenticeship, or postsecondary vocational training, or some college, or Associate's Degree, or less than a bachelor's degree
- **HIGH:** Bachelor's degree or higher

In the Greenville area, 25 of the top 50 jobs in 2012 are considered low-skill jobs. Twenty are middle skill, and five are high-skill occupations.

**Figure 5: Top Occupations By Skill Classification - Greenville 2012**

|  |
|--|
| <b>Skillset: LOW</b>   |
| Billing and Posting Clerks   |
| Cashiers   |
| Combined Food Preparation and Serving Workers, Including Fast Food                           |
| Construction Laborers  |
| Cooks, Restaurant  |
| Customer Service Representatives   |
| Dishwashers  |
| Driver/Sales Workers   |
| Food Preparation Workers   |
| Industrial Truck and Tractor Operators   |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners                                |
| Laborers and Freight, Stock, and Material Movers, Hand                                       |
| Landscaping and Groundskeeping Workers   |
| Light Truck or Delivery Services Drivers   |
| Maids and Housekeeping Cleaners  |
| Office Clerks, General   |
| Packers and Packagers, Hand  |
| Personal Care Aides  |
| Receptionists and Information Clerks   |
| Retail Salespersons  |
| Secretaries and Administrative Assistants, Except Legal, Medical, and Executive              |
| Shipping, Receiving, and Traffic Clerks  |
| Stock Clerks and Order Fillers   |
| Teacher Assistants   |
| Waiters and Waitresses   |
| <b>Skillset: MIDDLE</b>  |
| Automotive Service Technicians and Mechanics   |
| Bookkeeping, Accounting, and Auditing Clerks   |
| Computer User Support Specialists  |
| Executive Secretaries and Executive Administrative Assistants                                |
| First-Line Supervisors of Food Preparation and Serving Workers                               |
| First-Line Supervisors of Office and Administrative Support Workers                          |
| First-Line Supervisors of Production and Operating Workers                                   |
| First-Line Supervisors of Retail Sales Workers   |
| General and Operations Managers  |
| Heavy and Tractor-Trailer Truck Drivers  |
| Inspectors, Testers, Sorters, Samplers, and Weighers   |
| Licensed Practical and Licensed Vocational Nurses  |
| Machinists   |
| Maintenance and Repair Workers, General  |
| Medical Assistants   |
| Nursing Assistants   |
| Registered Nurses  |
| Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products |
| Substitute Teachers  |
| Team Assemblers  |
| <b>Skillset: HIGH</b>  |
| Accountants and Auditors   |
| Elementary School Teachers, Except Special Education   |
| Mechanical Engineers   |
| Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products        |
| Secondary School Teachers, Except Special and Career/Technical Education                     |

Source: BLS, SCDEW, OES, Workforce Intelligence (WI)

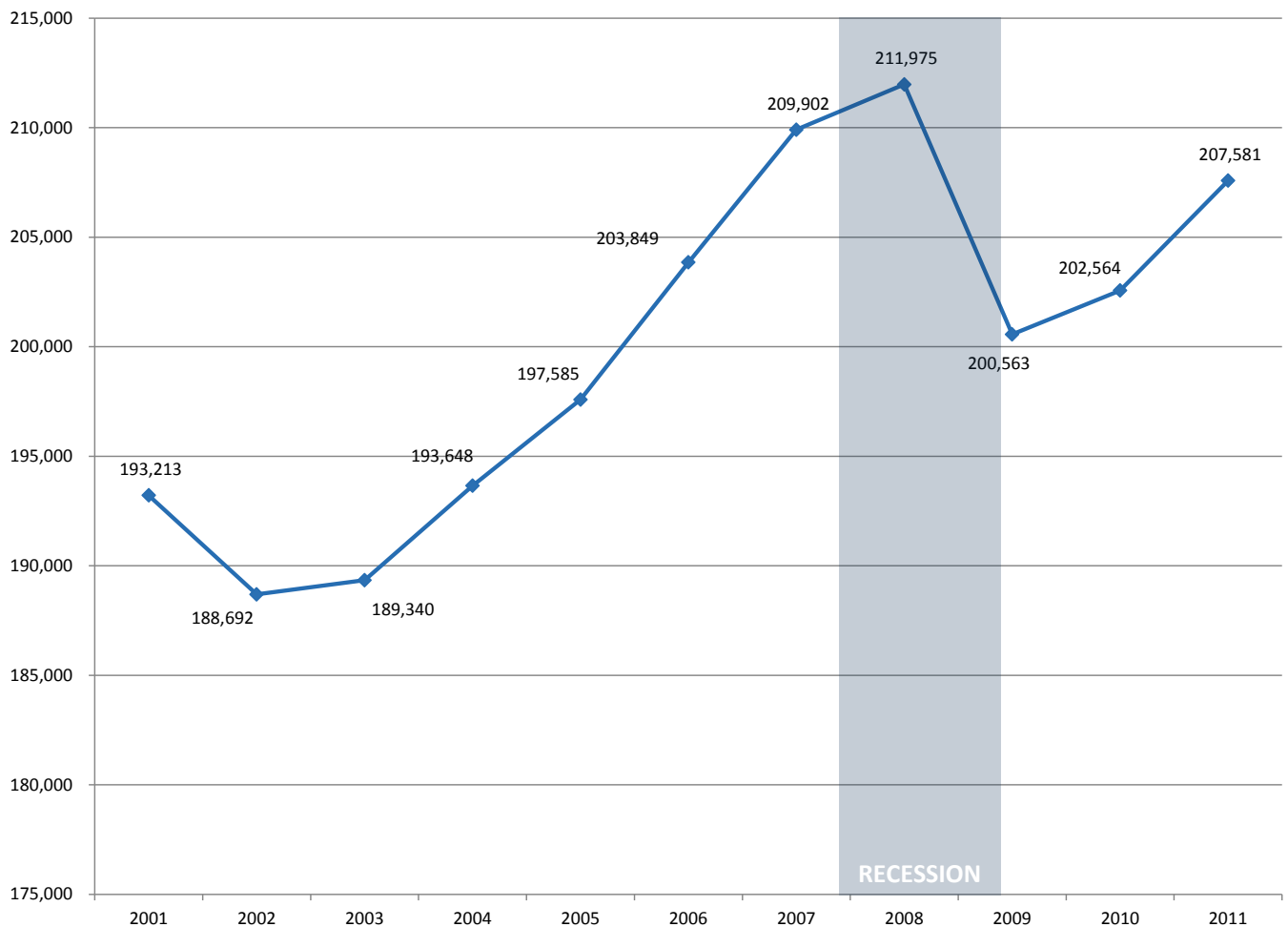
## EMPLOYMENT AND UNEMPLOYMENT

A crucial indicator of the health of a workforce is its labor force levels. Labor force data count residents who are employed and unemployed. There are a few Federal definitions that will make discussion of the labor force a little easier to understand.

- Employed: Persons 16 years old or older who worked for pay any time during the week that includes the 12th of the month
- Unemployed: Persons 16 years old or older who are not working but want a job, and are able and willing to work
- Labor Force: Employed plus unemployed
- Unemployment Rate: Unemployment divided by labor force

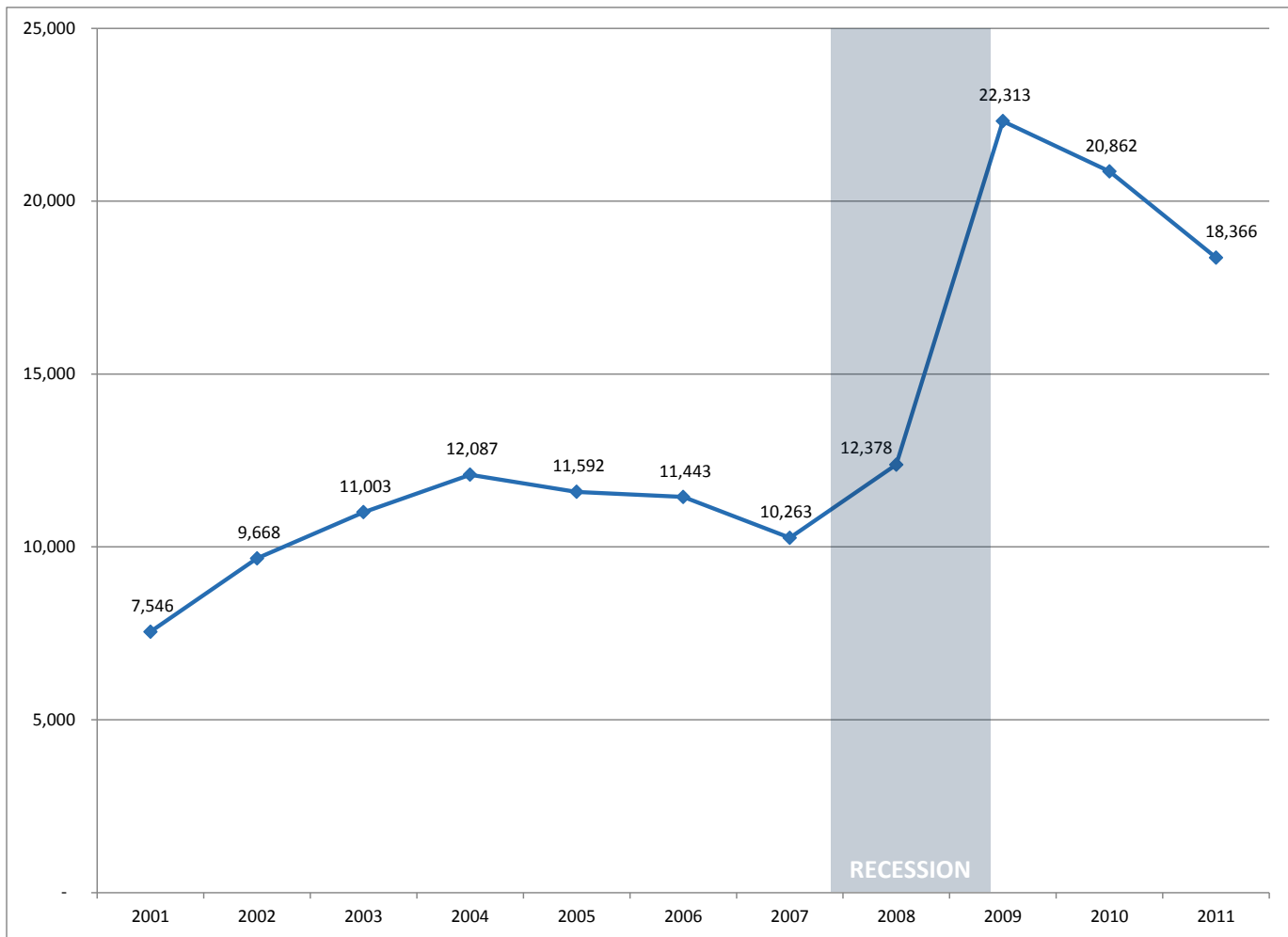
In Figure 6, the recession (officially from December 2007 through June 2009) had a great effect on the labor force. Employment dropped, and unemployment increased by 117 percent.

**Figure 6: Employment - 2001-2011**



Source: BLS, SCDEW, Local Area Unemployment Statistics (LAUS)

**Figure 7: Unemployment - 2001-2011**

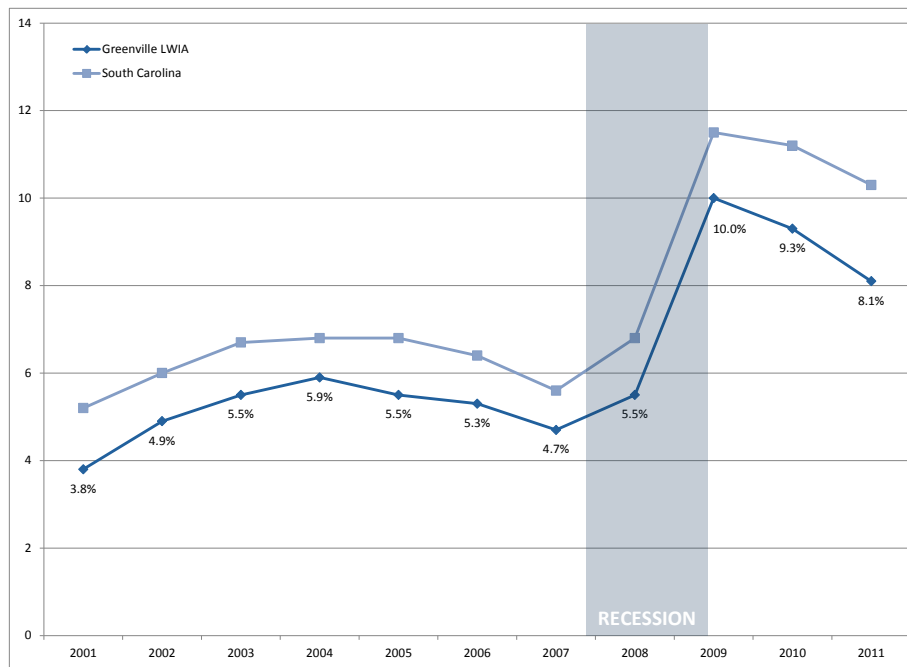


Source: BLS, SCDEW, LAUS

Tracking annual unemployment rates gives a good snapshot of the state of an area's workforce. Annual rates smooth out the usual ups and downs of a month-to-month rate (due to normal seasonal or cyclical changes) to give a more accurate picture.

Figure 8 shows the annual rates for the Greenville LWIA area and South Carolina. From 2001 Greenville has been consistently below the state's rate. During the recession, the Greenville rate almost doubled from 5.5 percent in 2008 to 10.0 percent in 2009.

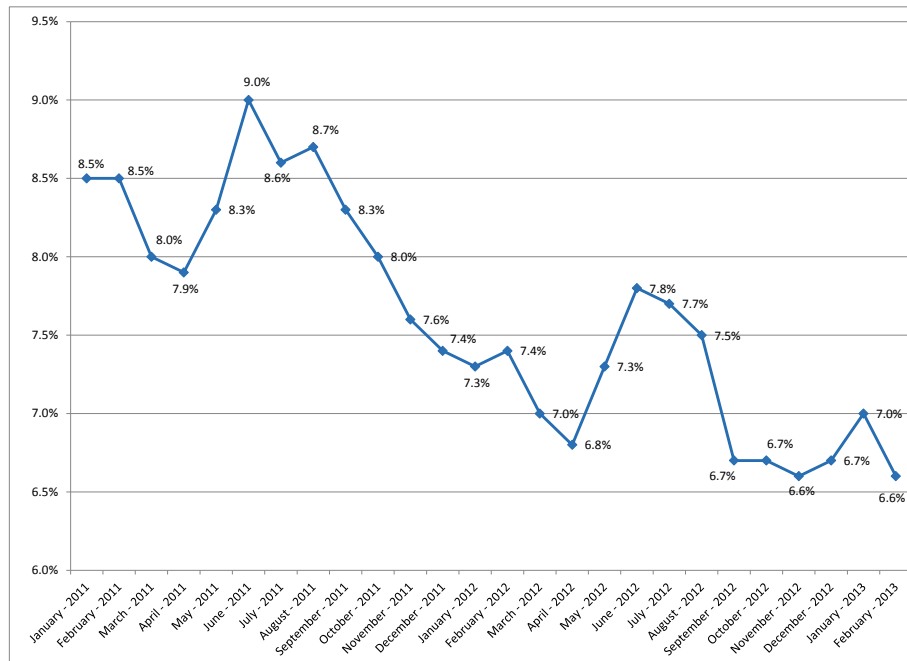
**Figure 8: Annual Unemployment - 2001-2011**



Source: BLS, SCDEW, LAUS

Figure 9 illustrates the monthly unemployment rate with its wide fluctuations since January 2011. Considering the slow recovery from the recession, the area seems to be steadily recovering.

**Figure 9: Monthly Unemployment Rate - January 2011-February 2013**



Source: BLS, SCDEW, LAUS

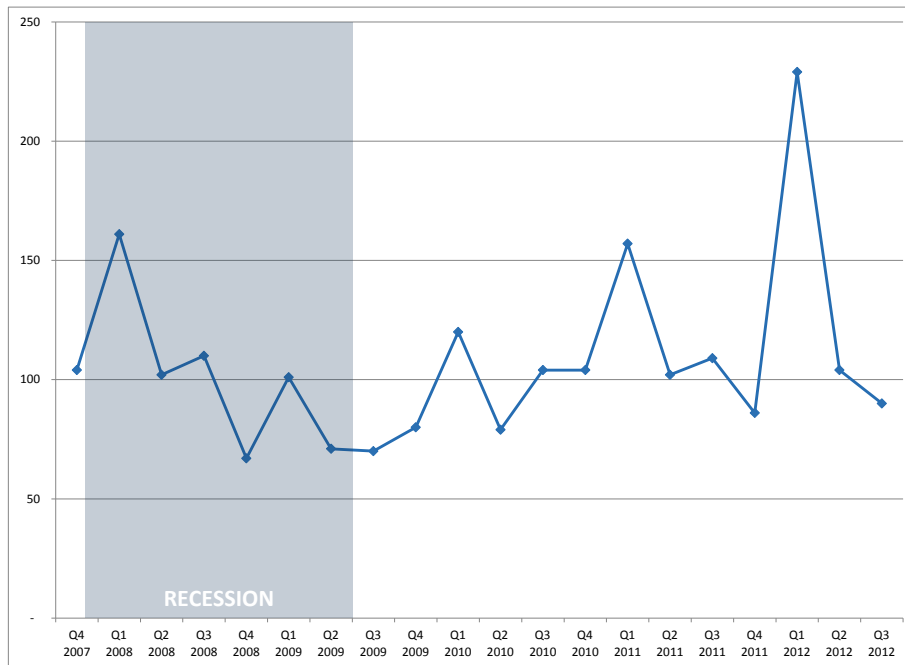
**NEW STARTUP FIRMS**

One way to see if an economy is improving is to examine data about startup firms. An increase in new companies might be an indicator of expansion in the area, whereas a drop in new firms shows a lack of confidence in the future. (Note: There is almost always a spike in startups in the first quarter



of the year.) Again, the recession had a major impact on normal business births and deaths. Start-ups have been steadily increasing in the area with a large increase in early 2012.

**Figure 10: New Startup Firms - 2007-2012**



Source: BLS, SCDEW, QCEW

### EMPLOYERS BY SIZE OF ESTABLISHMENT

By far, the largest category of business size in the area is small business. Small businesses (or establishments) are defined in South Carolina as companies employing 49 or fewer people. The Greenville LWIA and South Carolina as a whole have 93 percent of establishments designated as small businesses.

Small businesses may need more support and assistance than larger companies because they may not have a designated human resources department or person. They may rely on other resources, such as SC Works Centers, for help with hiring, training, or screening job candidates.

**Figure 11: Employers by Size of Establishment - 3rd Quarter 2012**

| Employees  | Greenville | South Carolina |
|------------|------------|----------------|
| 0 to 4     | 6,323      | 63,766         |
| 5 to 9     | 2,222      | 19,667         |
| 10 to 19   | 1,548      | 13,316         |
| 20 to 49   | 1,186      | 9,881          |
| 50 to 99   | 479        | 3,907          |
| 100 to 249 | 283        | 2,433          |
| 250 to 499 | 62         | 757            |
| 500 to 999 | 20         | 328            |
| 1000 +     | 18         | 264            |

Source: BLS, SCDEW, QCEW

## SUPPLY: WHAT'S OUT THERE?

A manufacturing assembly line needs to have resources and supplies on-hand so that the line does not have to stop. The same is true for the workforce. The supply of workers needs to be of the right quantity and quality to do the job. Is the supply of workers in line with what the companies in the Greenville LWIA need? Seven streams of workforce supply provide an indication: population, commuting, education of the population, clusters of high school students, awards earned at higher education institutions, and characteristics of unemployment insurance claims and claimants.

### POPULATION BY AGE

Age distribution in the area is similar to the state. The largest difference is in the prime working 25-49 age cohort, where Greenville has a notably higher proportion and a lower proportion of 60-79 year olds.

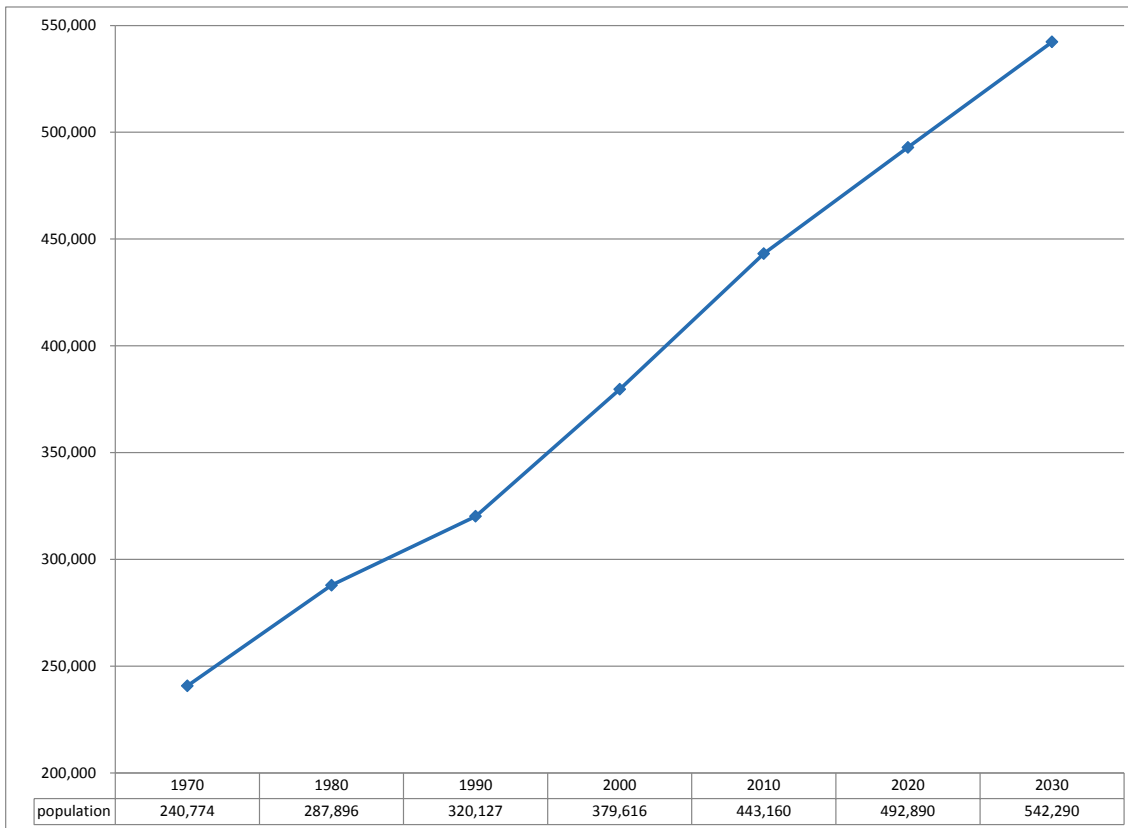
**Figure 12: Population by Age**

| Age Range | Greenville | SC   | US   |
|-----------|------------|------|------|
| 0-4       | 6.9%       | 6.5% | 6.6% |
| 5-9       | 6.6%       | 6.4% | 6.6% |
| 10-14     | 6.7%       | 6.5% | 6.7% |
| 15-19     | 6.9%       | 7.2% | 7.2% |
| 20-24     | 6.6%       | 7.2% | 7.0% |
| 25-29     | 6.8%       | 6.6% | 6.8% |
| 30-34     | 6.7%       | 6.2% | 6.4% |
| 35-39     | 7.1%       | 6.5% | 6.6% |
| 40-44     | 7.2%       | 6.8% | 7.0% |
| 45-49     | 7.4%       | 7.2% | 7.4% |
| 50-54     | 7.0%       | 7.0% | 7.2% |
| 55-59     | 6.4%       | 6.5% | 6.3% |
| 60-64     | 5.2%       | 5.9% | 5.3% |
| 65-69     | 4.2%       | 4.5% | 3.9% |
| 70-74     | 3.0%       | 3.3% | 3.0% |
| 75-79     | 2.3%       | 2.5% | 2.4% |
| 80-84     | 1.7%       | 1.7% | 1.9% |
| 85+       | 1.5%       | 1.5% | 1.7% |

Source: US Bureau of Census, American Community Survey (ACS)

## POPULATION CHANGE AND MIGRATION

**Figure 13: Population Projections to 2030**



Source: US Census Bureau, Census 2000, SC Department of Health and Environmental Control - Vital Records Department. Population projections calculated by SC Budget and Control Board, Office of Research and Statistics

**Figure 14: Population Migration - 2011 - 5-Year Estimate**

|   | Total   | Moved From Different State | Moved From Abroad | Moved From Different County | Moved Within Same County |
|---|---------|----------------------------|-------------------|-----------------------------|--------------------------|
| Population 1 year and over              | 439,122 | 3.60%                      | 0.60%             | 2.90%                       | 10.10%                   |
| Hispanic or Latino origin (of any race) | 33,674  | 5.50%                      | 1.50%             | 1.50%                       | 16.40%                   |
| White alone, not Hispanic or Latino     | 311,364 | 3.70%                      | 0.40%             | 2.90%                       | 8.10%                    |
| Population 25 Years and Over            |         |                            |                   |                             |                          |
| Less than high school graduate          | 44,174  | 3.30%                      | 0.80%             | 3.50%                       | 9.70%                    |
| High school graduate/GED                | 80,175  | 2.30%                      | 0.20%             | 1.90%                       | 9.80%                    |
| Some college or associate's degree      | 81,556  | 3.10%                      | 0.40%             | 2.50%                       | 9.10%                    |
| Bachelor's degree                       | 59,159  | 3.70%                      | 0.60%             | 2.10%                       | 6.80%                    |
| Graduate or professional degree         | 30,310  | 5.00%                      | 1.10%             | 2.00%                       | 5.00%                    |

Source: US Census Bureau, ACS, SCDEW

After a large jump in population from 2000 to 2010 (up 16.7 percent), the growth of the population of this area slowed down, growing an average of 5.6 percent every five years until 2030. In-migration (people moving into Greenville County) shows while over 17 percent of the population changed residence, just over 4 percent moved from outside of South Carolina. A higher portion of Hispanic residents moved from out of state than Whites did. Over 6 percent of the of the adult population with a graduate degree moved from outside of South Carolina.

## COMMUTING PATTERNS

Most of the residents (65 percent) of Greenville County live and work within the county. The tables in Figure 15 show that over 61,000 workers commute into Greenville County. Neighboring Spartanburg County draws a sizeable portion of Greenville County's residents out of the county to work. Over 31,000 more workers commute into Greenville County than leave it to work.

**Figure 15: Commuting Patterns - 2010**

| <b>From Greenville WIA To</b> | <b>29,986</b> | <b>To Greenville WIA From</b> | <b>61,347</b> |
|-------------------------------|---------------|-------------------------------|---------------|
| Spartanburg County, SC        | 14,910        | Spartanburg County, SC        | 15,920        |
| Anderson County, SC           | 3,834         | Anderson County, SC           | 15,561        |
| Pickens County, SC            | 3,029         | Pickens County, SC            | 13,492        |
| Laurens County, SC            | 2,241         | Laurens County, SC            | 6,982         |
|                               |               | Oconee County, SC             | 1,232         |

Source: US Census Bureau, ACS

## EDUCATIONAL ATTAINMENT

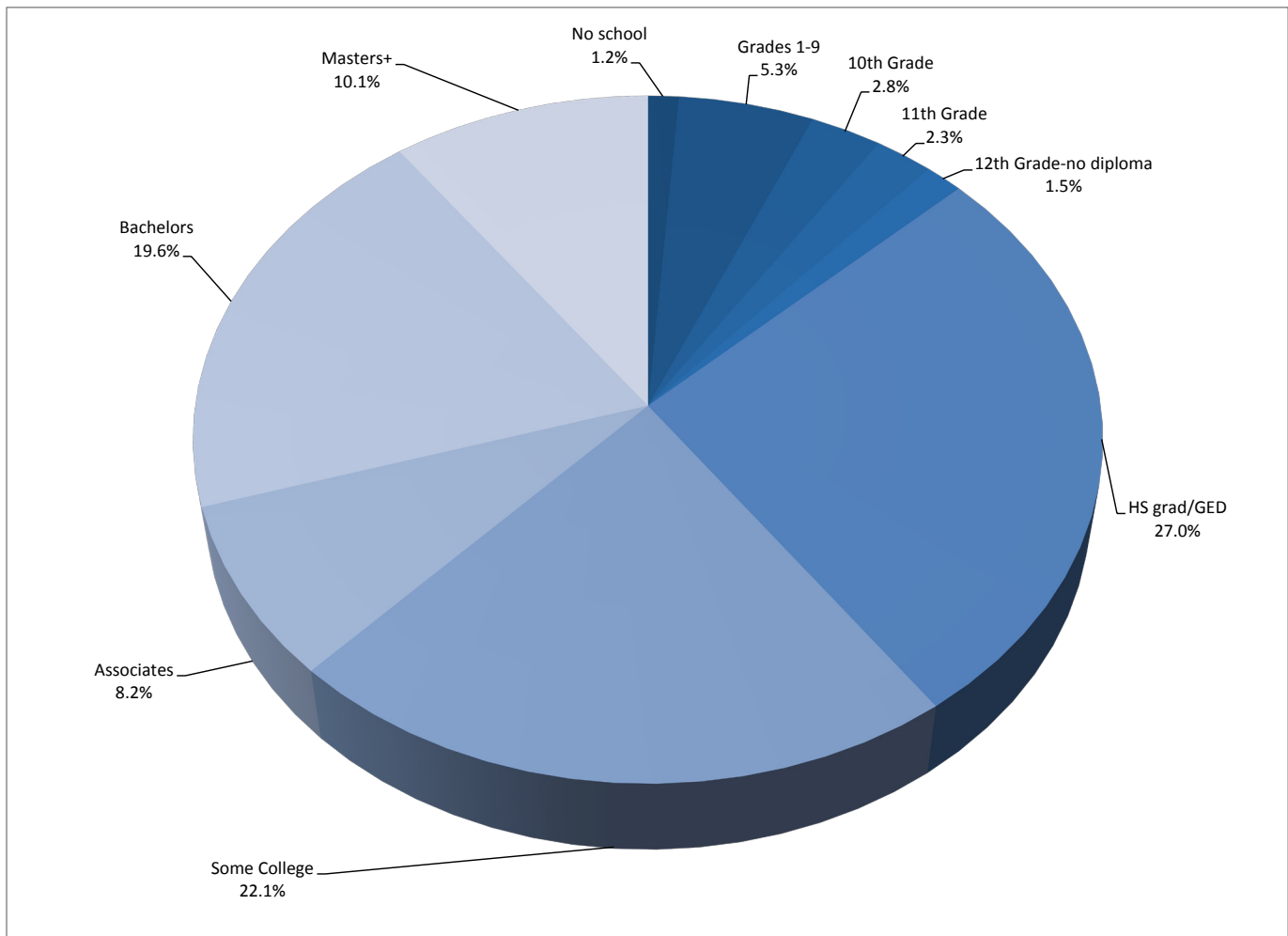
The Greenville LWIA area has more residents with higher-level degrees than the state as a whole. The Greenville LWIA has a nearly 4 percent higher concentration of residents with a bachelor's degree than the state. The area also has a higher concentration of residents with some college and with a master's degree. However, the Greenville LWIA has a lower percent of residents with a high school diploma/GED and with an associate's degree.

**Figure 16: Educational Attainment - Greenville and South Carolina 2011**

| <b>Education Level</b> | <b>Greenville</b> | <b>SC</b> |
|------------------------|-------------------|-----------|
| No school              | 1.2               | 1.2       |
| Grades 1-9             | 5.3               | 6.8       |
| 10th Grade             | 2.8               | 3.2       |
| 11th Grade             | 2.3               | 3.2       |
| 12th Grade-no diploma  | 1.5               | 1.7       |
| HS grad/GED            | 27.0              | 30.5      |
| Some College           | 22.1              | 20.7      |
| Associates             | 8.2               | 8.5       |
| Bachelors              | 19.6              | 15.7      |
| Masters+               | 10.1              | 8.6       |

Source: US Census Bureau, ACS, SCDEW

**Figure 17: Educational Attainment - Greenville 2011**

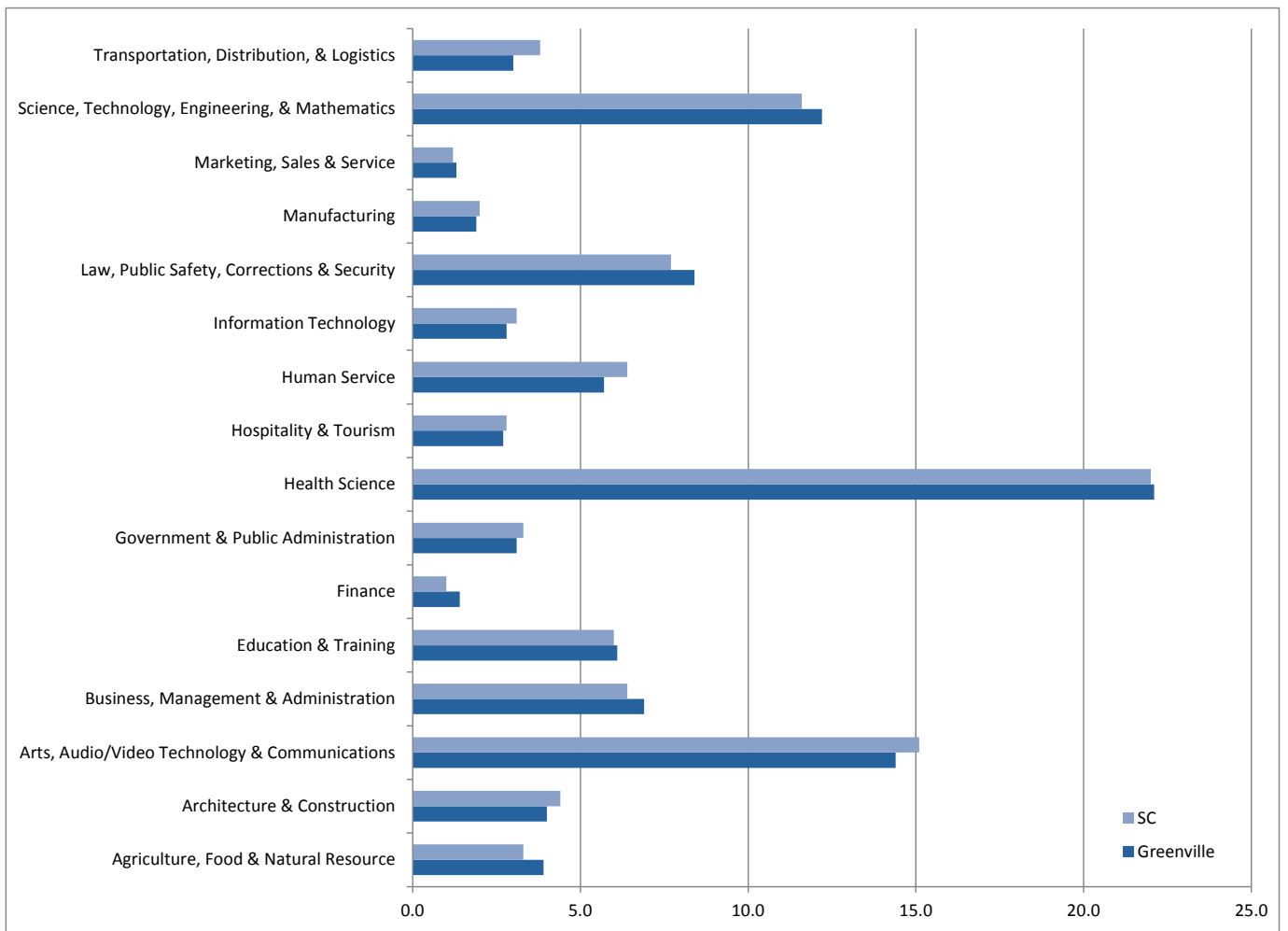


Source: US Census Bureau, ACS, SCDEW

### **CAREER CLUSTERS SELECTED BY HIGH SCHOOL STUDENTS**

Eighth-grade students in South Carolina are required to choose a career cluster to concentrate on to lead them to a post-high school job or college major. There are 16 career clusters.

**Figure 18: Percent of Students Declaring a Career Clusters In Greenville and SC - 2012**



*Note: Declared clusters for students declaring a specific cluster on their primary Electronic Individual Graduation Plan (e-IGP) for 2011-2012 year*

*Source: SC Department of Education*

Many students in the Greenville area have chosen the Health Science career cluster in response to news of a shortage of healthcare workers in South Carolina. In keeping with the state trend, the area’s students also picked the Arts, Audio/Video Technology and Communications cluster and the Science, Technology, Engineering and Math (STEM) cluster.

**Figure 19: Career Clusters - 2012**

| Cluster   | Greenville | SC   |
|---|------------|------|
| Agriculture, Food & Natural Resource            | 3.9        | 3.3  |
| Architecture & Construction                     | 4.0        | 4.4  |
| Arts, Audio/Video Technology & Communications   | 14.4       | 15.1 |
| Business, Management & Administration           | 6.9        | 6.4  |
| Education & Training                            | 6.1        | 6.0  |
| Finance   | 1.4        | 1.0  |
| Government & Public Administration              | 3.1        | 3.3  |
| Health Science                                  | 22.1       | 22.0 |
| Hospitality & Tourism                           | 2.7        | 2.8  |
| Human Service                                   | 5.7        | 6.4  |
| Information Technology                          | 2.8        | 3.1  |
| Law, Public Safety, Corrections & Security      | 8.4        | 7.7  |
| Manufacturing                                   | 1.9        | 2.0  |
| Marketing, Sales & Service                      | 1.3        | 1.2  |
| Science, Technology, Engineering, & Mathematics | 12.2       | 11.6 |
| Transportation, Distribution, & Logistics       | 3.0        | 3.8  |

Source: SC Department of Education

### *DEGREES AWARDED*

In higher education, Greenville area colleges and universities have conferred a wide variety of awards. Of the top 20, several are related to healthcare. The universities included in this data are Bob Jones University, Furman University, Greenville Technical College, and North Greenville University.

**Figure 20: Top 20 Majors in Greenville - 2011**

| Majors  |     |
|---|-----|
| Registered Nursing/Registered Nurse                   | 425 |
| Business Administration and Management, General       | 298 |
| Liberal Arts and Sciences/Liberal Studies             | 290 |
| Automobile/Automotive Mechanics Technology            | 189 |
| Truck and Bus Driver/Commercial Vehicle Operator      | 174 |
| Licensed Practical/Vocational Nurse Training          | 163 |
| Heat, Air Cond, Ventilation & Refrig Maint Technology | 127 |
| Accounting  | 122 |
| Physical Therapy Technician/Assistant                 | 121 |
| Welding Technology/Welder                             | 99  |
| Data Processing & Data Processing Technology          | 85  |
| Social Work   | 85  |
| Biology/Biological Sciences, General                  | 85  |
| Political Science and Government, General             | 74  |
| Elementary Education and Teaching                     | 73  |
| History, General                                      | 70  |
| English Language and Literature, General              | 64  |
| Sales, Distribution, and Marketing Operations         | 63  |
| Psychology, General                                   | 57  |
| Bible/Biblical Studies                                | 48  |

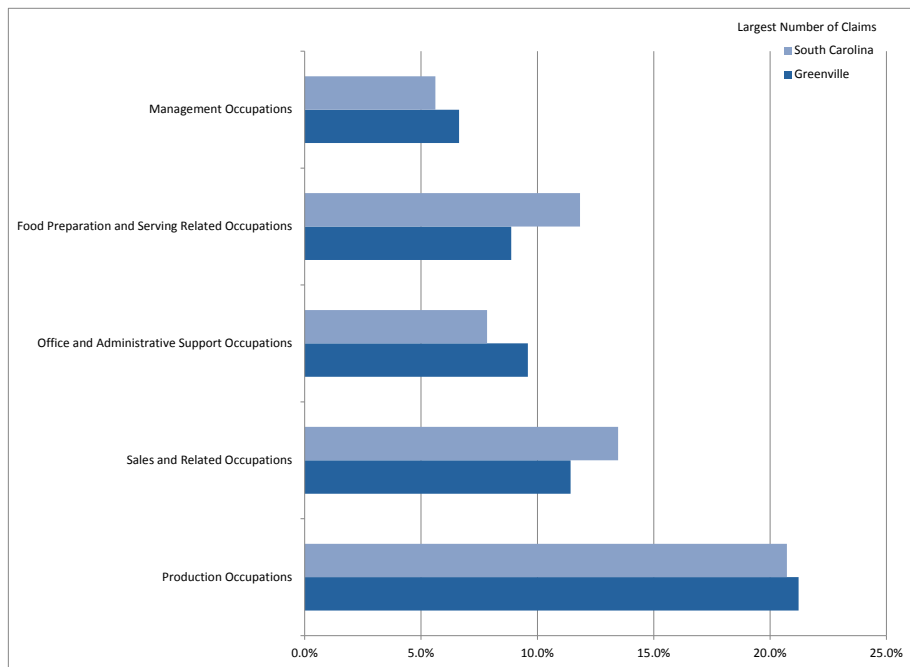
Source: SC Commission on Higher Education, [http://www.che.sc.gov/New\\_Web/Data&Pubs.htm](http://www.che.sc.gov/New_Web/Data&Pubs.htm)

### *CHARACTERISTICS OF UI CLAIMS BY OCCUPATION*

Another source of supply for the workforce is people who are receiving unemployment compensation. In the Greenville LWIA area, most claims filed are in the Manufacturing (or Production) group. This is in line with the areas industry concentration of manufacturing companies.



**Figure 21: Characteristics of UI Claims by Occupation - March 2013**



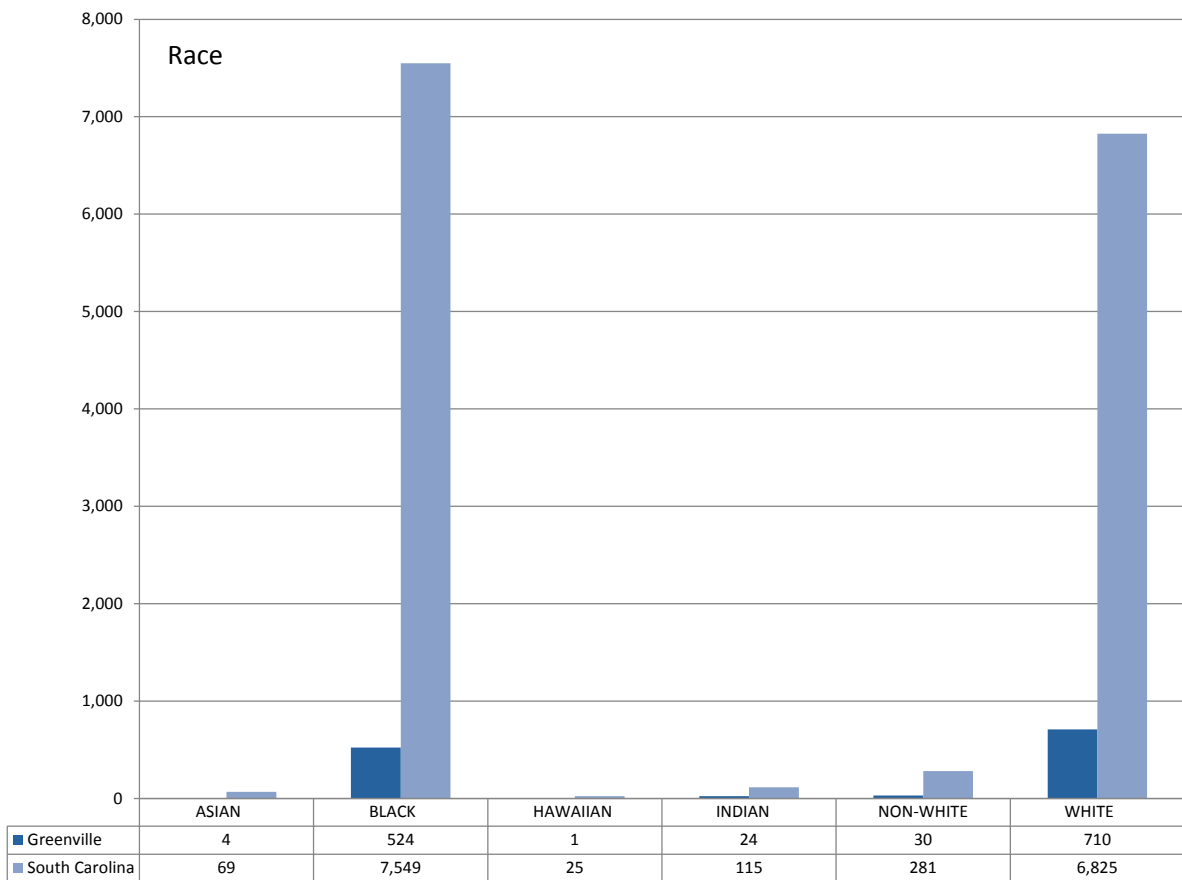
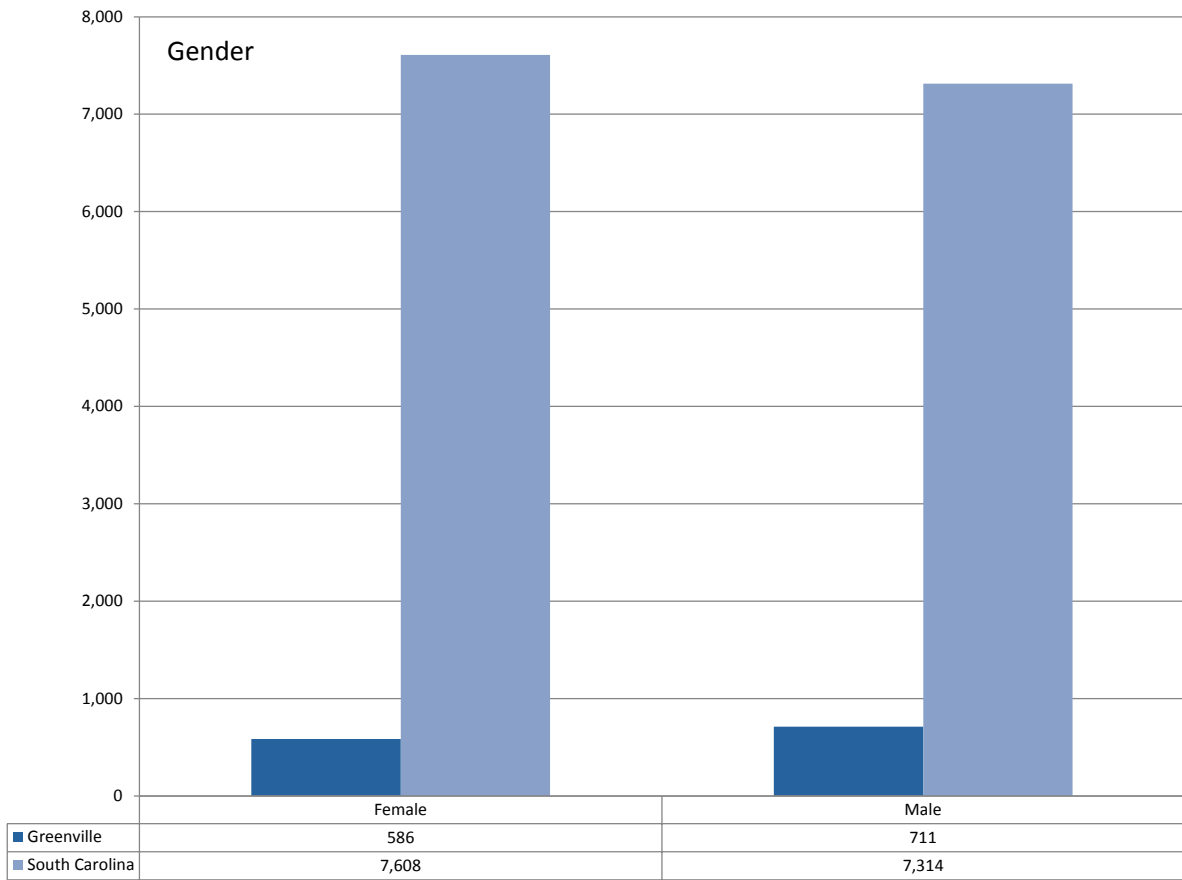
| Occupation                                       | Greenville | South Carolina |
|--|------------|----------------|
| Administrative and Support and Waste Management  | 258        | 2,373          |
| Manufacturing                                    | 189        | 2,267          |
| Retail Trade                                     | 179        | 1,616          |
| Accommodation and Food Services                  | 91         | 1,321          |
| Health Care and Social Assistance                | 83         | 1,076          |
| Professional, Scientific, and Technical Services | 77         | 698            |
| Construction                                     | 64         | 820            |
| Wholesale Trade                                  | 51         | 445            |
| Finance and Insurance                            | 26         | 300            |
| Transportation and Warehousing                   | 25         | 414            |
| Real Estate and Rental and Leasing               | 22         | 213            |
| Other Services (except Public Administration)    | 22         | 292            |
| Educational Services                             | 19         | 222            |
| Information                                      | 12         | 122            |
| Public Administration                            | 10         | 206            |
| Arts, Entertainment, and Recreation              | 9          | 94             |
| Management of Companies and Enterprises          | 5          | 35             |
| Mining, Quarrying, and Oil and Gas Extraction    | 1          | 10             |
| Utilities  | 1          | 22             |

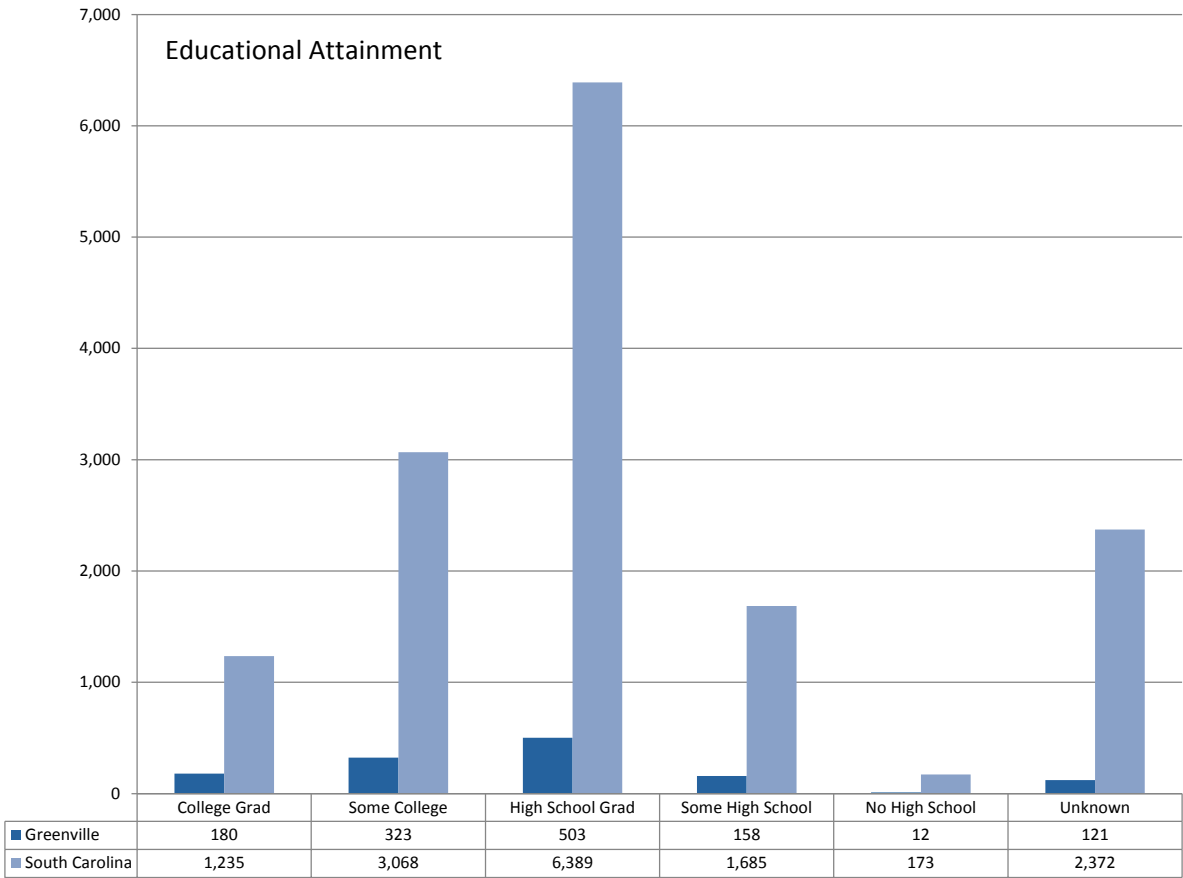
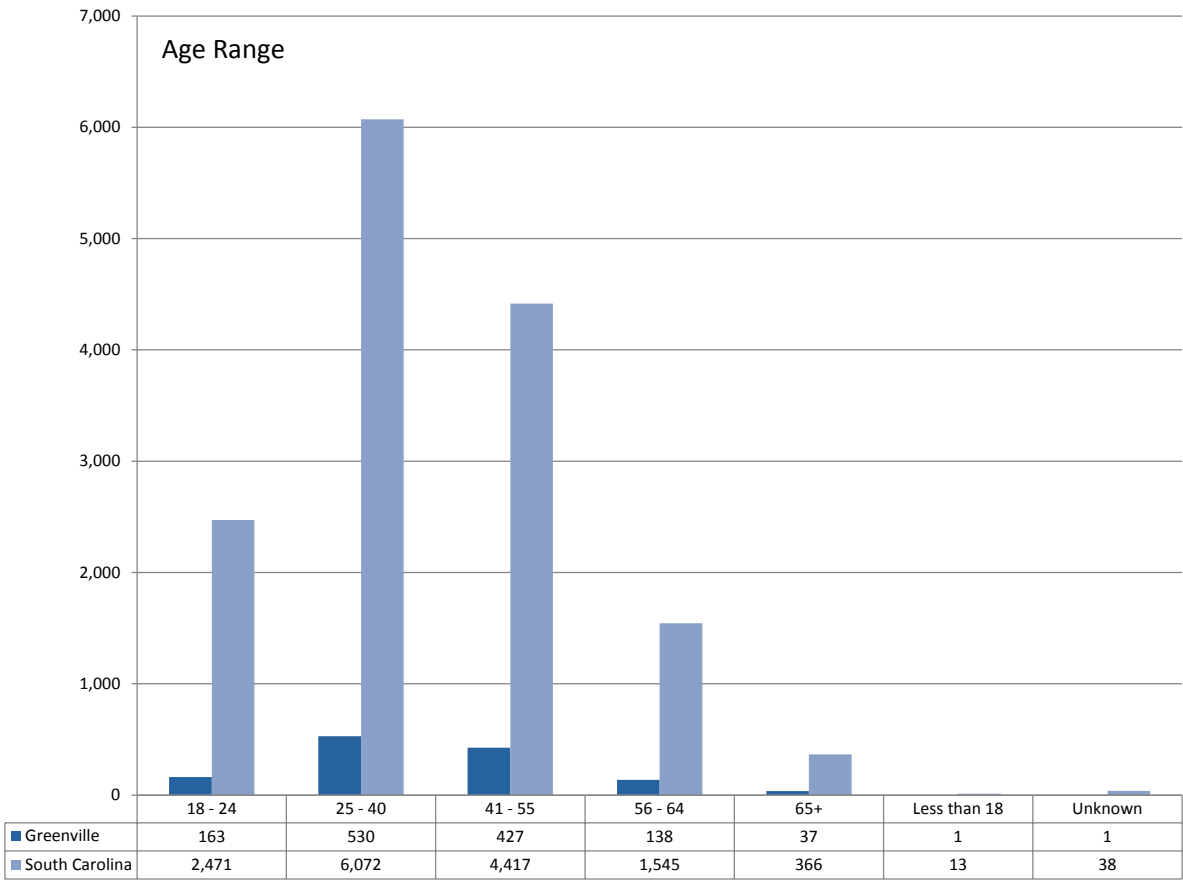
Source: SCDEW

### UNEMPLOYMENT INSURANCE CLAIMANT CHARACTERISTICS

The people in this area who were receiving unemployment insurance benefits in March 2013 were typically male, white, 25-40 years old, and were high school graduates or earned a GED.

**Figure 22: UI Claimant Characteristics - March 2013**





Source: SCDEW

## DEMAND: WHAT DO WE NEED?

Workforce demand shows what is needed in an area to support current and future employers. This section examines current (real-time) demand through online job advertisements, industry and occupational projections to 2018, educational requirements for future jobs, and the skills needed for those occupations.

Online job advertisements give a snapshot of what positions need to be filled in an area. The data is from the Conference Board Help Wanted OnLine® Data Series (HWOL) which measures the number of new and reposted job ads from over 16,000 Internet job boards. In February 2013, the largest occupational group with job ads in the Greenville LWIA was Sales and Related followed by Office and Administrative Support and Healthcare Practitioners.

### ONLINE JOB ADVERTISEMENTS

**Figure 23: Greenville HWOL - February 2013 by Major Group**

| Occupation   | # of Job Ads |
|--|--------------|
| Sales & Related Occupations                              | 1,320        |
| Office & Administrative Support Occupations              | 1,133        |
| Healthcare Practitioners & Technical Occupations         | 877          |
| Computer & Mathematical Occupations                      | 792          |
| Architecture & Engineering Occupations                   | 721          |
| Management Occupations                                   | 659          |
| Transportation & Material Moving Occupations             | 655          |
| Installation, Maintenance, & Repair Occupations          | 467          |
| Business & Financial Operations Occupations              | 466          |
| Production Occupations                                   | 421          |
| Food Preparation & Serving Related Occupations           | 361          |
| Healthcare Support Occupations                           | 268          |
| Construction & Extraction Occupations                    | 237          |
| Building & Grounds Cleaning & Maintenance Occupations    | 193          |
| Arts, Design, Entertainment, Sports, & Media Occupations | 153          |
| Personal Care & Service Occupations                      | 147          |
| Education, Training, & Library Occupations               | 138          |
| Protective Service Occupations                           | 58           |
| Community & Social Service Occupations                   | 57           |
| Life, Physical, & Social Science Occupations             | 55           |
| Legal Occupations  | 45           |
| Farming, Fishing, & Forestry Occupations                 | 3            |
| Military Specific Occupations                            | 1            |

*Note: A job advertisement may include multiple openings.*

*Source: The Conference Board Help Wanted OnLine® Data Series (HWOL)*

### INDUSTRY PROJECTIONS

The Administrative and Support and Waste Management and Remediation Services industry is projected to have the largest growth from 2008 to 2018, growing by 5,106 jobs or 511 jobs/year. This sector includes services such as facilities support; employment services; business support; building and dwellings support; and waste collection, treatment, and disposal. Healthcare and Social As-

sistance reports the next largest growth with a projected 489 openings/year. This sector includes hospitals, doctors' and dentists' offices, home health care, nursing care facilities, social assistance, and emergency relief facilities.

**Figure 24: Industry Projections - 2008-2018**

| Industry  | Estimate<br>Employment<br>(2008) | Projected<br>Employment<br>(2018) | Change | Percent Change | Annual Percent<br>Change |
|---|----------------------------------|-----------------------------------|--------|----------------|--------------------------|
| Total Employment, All Jobs                                      | 265,147                          | 288,216                           | 23,069 | 8.70           | 0.84                     |
| Administrative and Support and Waste Management and Remediation | 26,871                           | 31,977                            | 5,106  | 19.00          | 1.75                     |
| Health Care and Social Assistance                               | 25,676                           | 30,565                            | 4,889  | 19.04          | 1.76                     |
| Professional, Scientific, and Technical Services                | 14,105                           | 18,973                            | 4,868  | 34.51          | 3.01                     |
| Educational Services  | 15,422                           | 18,132                            | 2,710  | 17.57          | 1.63                     |
| Accommodation and Food Services                                 | 20,439                           | 21,964                            | 1,525  | 7.46           | 0.72                     |
| Other Services (Except Government)                              | 11,408                           | 12,639                            | 1,231  | 10.79          | 1.03                     |
| Real Estate and Rental and Leasing                              | 3,986                            | 5,101                             | 1,115  | 27.97          | 2.50                     |
| Wholesale Trade   | 11,808                           | 12,675                            | 867    | 7.34           | 0.71                     |
| Finance and Insurance   | 8,304                            | 8,999                             | 695    | 8.37           | 0.81                     |
| Arts, Entertainment, and Recreation                             | 2,981                            | 3,409                             | 428    | 14.36          | 1.35                     |
| Retail Trade  | 30,360                           | 30,769                            | 409    | 1.35           | 0.13                     |
| Transportation and Warehousing                                  | 8,891                            | 9,245                             | 354    | 3.98           | 0.39                     |
| Information   | 6,037                            | 6,347                             | 310    | 5.14           | 0.50                     |
| Management of Companies and Enterprises                         | 4,243                            | 4,470                             | 227    | 5.35           | 0.52                     |
| Government  | 9,613                            | 9,739                             | 126    | 1.31           | 0.13                     |
| Construction  | 13,084                           | 13,096                            | 12     | 0.09           | 0.01                     |
| Utilities   | 1,025                            | 873                               | -152   | -14.83         | -1.59                    |
| Manufacturing   | 31,442                           | 28,905                            | -2,537 | -8.07          | -0.84                    |

Source: BLS, SCDEW, QCEW, WI

## OCCUPATIONAL PROJECTIONS

Many of the jobs that are projected to have numerous openings between 2008 and 2018 in this area are jobs that have high turnover due to low wages. Occupations like Food Batchmakers and Personal Care Aides do not require extensive education, therefore the pay is low. The need for increased health services (for the aging Baby Boomers) puts several medical related positions in the list of growing occupations.

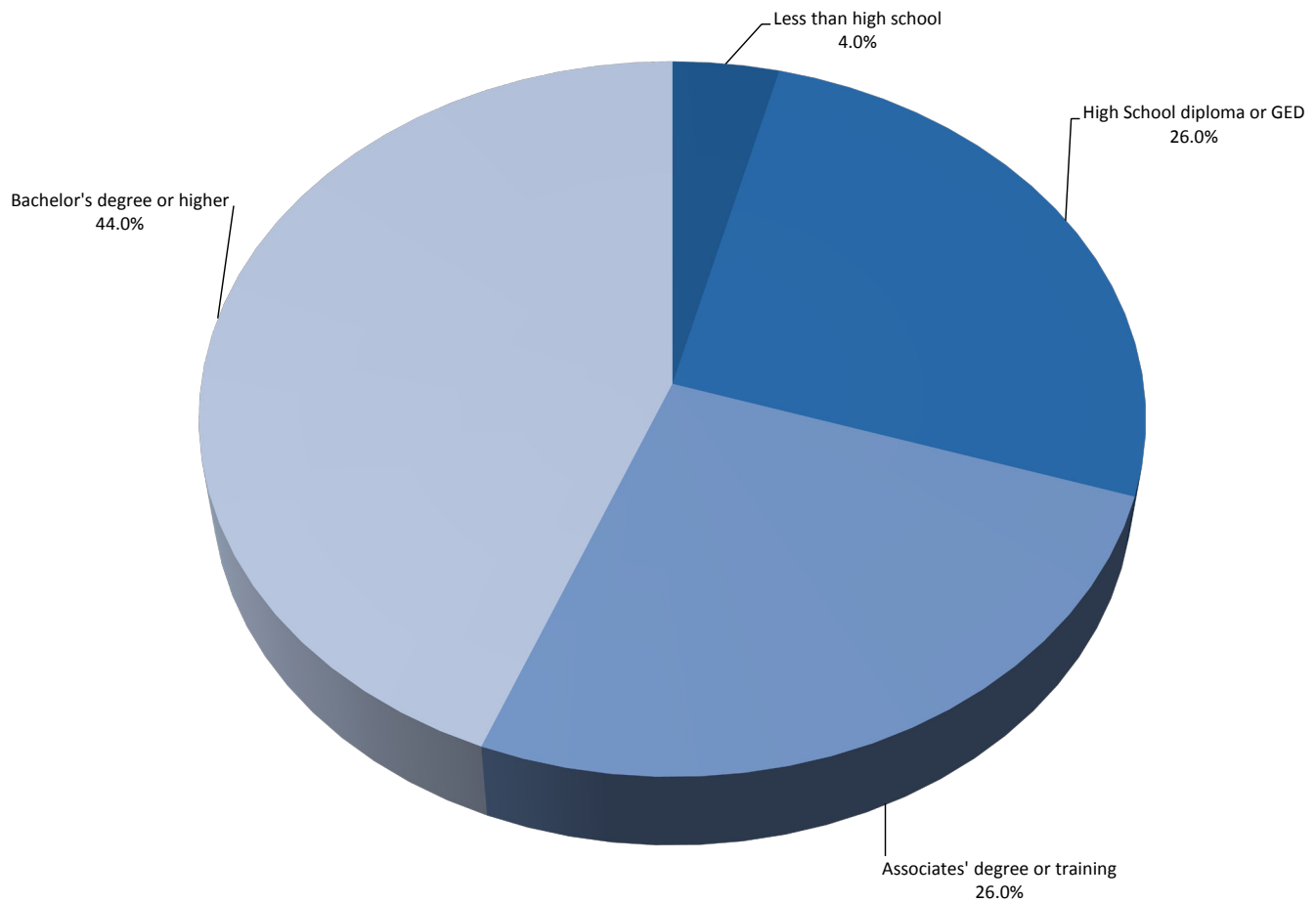
**Figure 25: Growing Occupations - 2008-2018**

| 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                          |

Source: BLS, SCDEW, OES, WI

Of the top 50 projected growing occupations by percent change, 13 require a high school diploma or GED, two require less than a high school diploma or GED, 22 require a bachelor's degree or higher, 13 have an associate's degree or require some kind of postsecondary training. Each of the two requiring less than a high school diploma or GED requires short-term on-the-job training (OJT), which is defined by the US Department of Labor as less than one month.

**Figure 26: Education for Top 50 Projected Occupations**



Source: BLS, SCDEW, OES, WI

It is just as important to know which occupations are declining in the area. Declines are often due to technological advances (i.e. computers or robots replacing humans), so many of the declining occupations are projected to be in textile manufacturing and administration.

**Figure 27: Top 20 Projected Declining Occupations in Greenville - 2008-2010**

| Occupation   |
|--|
| Chemical Equipment Operators and Tenders   |
| Chemical Plant and System Operators  |
| Computer Operators   |
| Cutters and Trimmers, Hand   |
| Electrical and Electronic Engineering Technicians                                    |
| Electrical and Electronic Equipment Assemblers                                       |
| File Clerks  |
| Grinding, Lapping, Polishing, and Buffing Machine                                    |
| Insurance Underwriters   |
| Lathe and Turning Machine Tool Setters, Operators,<br>Machine Feeders and Offbearers |
| Order Clerks   |
| Painters, Construction and Maintenance   |
| Postal Service Clerks  |
| Postal Service Mail Sorters, Processors, and Proce                                   |
| Roofers  |
| Sewing Machine Operators   |
| Textile Bleaching & Dyeing Machine Op. & Tenders                                     |
| Textile Cutting Machine Setters, Operators, Tender                                   |
| Textile Knitting and Weaving Machine Setters, Oper                                   |

Source: BLS, SCDEW, OES, WI

### SKILLS OF PROJECTED OCCUPATIONS

Using the top 50 projected occupations, the skill levels needed for the future workforce based on the definitions given earlier in this report can be categorized.

**Figure 28: Skill Levels**

|        |    |
|--------|----|
| Low    | 5  |
| Middle | 23 |
| High   | 22 |

Source: BLS, SCDEW, OES, WI

Low-skilled jobs often have commensurate (i.e. low) pay and do not require much education, experience, or OJT. Does the supply of workers have the right skills for the jobs in the future?



## WORKFORCE CHALLENGES

The current economic situation in the Greenville LWIA, the supply of workers, and the characteristics of workers who will be in demand has been reviewed. What can be gleaned from these findings? Are there gaps between supply and demand?

### Supply Findings

With the population growing at a steady 5.6 percent every five years until 2030 and a larger-than-the-state share of 25-49 year olds, this area looks to have a steady supply of workers. In addition, in-migration from other states/countries adds many residents with a higher education. This is evident in the overall educational attainment of residents 25 years and older: more residents with some college, bachelor's, and master's degrees than the state as a whole. On the other end of the scale, the Greenville LWIA, when compared to the state, has fewer residents with high school diplomas/GEDs and associate's degrees.

Many high school students selected the Health Science career cluster in keeping with state trends. The next most popular career cluster was Arts, Audio/Video/Technology, and Communications.

### Demand Findings

Employer demand was consistent between online advertisements (current) and 2018 projected occupations (long-term needs) in general. Among the leaders by the need for workers were Business, Management, and Administration; Health Science; and Marketing, Sales, and Service. Hospitality and Tourism was a long-term demand. Most of the top projected occupations require at least a high school diploma or GED.

**Figure 29: Comparison of Supply and Demand**

|  | Demand         |                       | Supply         |                          |
|--|----------------|-----------------------|----------------|--------------------------|
|  | Top online ads | Projected Occupations | Degrees Earned | Career Clusters Selected |
| Agriculture, Food and Natural Resource           | 2.1            | 1.9                   | 1.2            | 3.9                      |
| Architecture and Construction                    | 7.2            | 5.3                   | 7.5            | 4.0                      |
| Arts, Audio/Video Technology and Communications  | 2.0            | 1.5                   | 4.4            | 14.4                     |
| Business, Management and Administration          | 14.4           | 19.4                  | 10.6           | 6.9                      |
| Education and Training                           | 2.0            | 4.1                   | 13.2           | 6.1                      |
| Finance  | 4.2            | 3.0                   | 0.1            | 1.4                      |
| Government and Public Administration             | 0.1            | 0.2                   | 1.5            | 3.1                      |
| Health Science                                   | 11.9           | 9.0                   | 24.5           | 22.1                     |
| Hospitality and Tourism                          | 4.9            | 11.3                  | 0.0            | 2.7                      |
| Human Service                                    | 4.8            | 6.3                   | 15.4           | 5.7                      |
| Information Technology                           | 7.0            | 2.7                   | 1.3            | 2.8                      |
| Law, Public Safety, Corrections and Security     | 1.1            | 1.8                   | 2.4            | 8.4                      |
| Manufacturing                                    | 5.6            | 8.7                   | 1.3            | 1.9                      |
| Marketing, Sales and Service                     | 16.5           | 15.5                  | 1.8            | 1.3                      |
| Science, Technology, Engineering and Mathematics | 5.9            | 2.3                   | 6.6            | 12.2                     |
| Transportation, Distribution, and Logistics      | 10.3           | 7.1                   | 8.3            | 3.0                      |

Source: BLS, SCDEW, WI, SC Department of Education, OES, HWOL

A few observations about the comparison that could be considered challenges to the workforce pipeline include:

- There are fewer area graduates and students in Hospitality and Tourism; Manufacturing; and Marketing, Sales and Service than are needed by employers in both the short- and long-terms.
- More graduates and students chose Health Science than area employers need.
- There are more graduates in Education and Training and Human Service than open positions currently available.
- There is a higher job demand in Finance and Information Technology than there are recent graduates to fill it.
- More students are choosing Arts, Audio/Video Technology and Communication; Law, Public Safety, Corrections and Security; and Science, Technology, Engineering and Mathematics than the long-term area employment demand requires.
- There is a long-term demand for workers in Business, Management and Administration; and Transportation, Distribution, and Logistics that is not projected to be met by today's area students.

There is always a demand for employees with soft skills. It is said that hard skills (training, degrees, or certification) get you hired, but soft skills get you fired. Many of our residents need to learn or get a refresher in soft skills in order to KEEP their jobs. Employers see the need.

#### Top 10 Soft Skills Found in Online Ads for South Carolina (April 2013)

1. Oral and written communication skills
2. Customer service oriented
3. Problem solving
4. Detail oriented
5. Microsoft Office
6. Self-starting / Self-motivated
7. Organizational skills
8. Troubleshooting
9. Work independently
10. Sales experience

Source: *The Conference Board Help Wanted OnLine*® Data Series (HWOL)

## CONCLUSION

The workforce (current and potential) in the Greenville LWIA area seems to be in good shape. The population continues to increase, and the education level for the population is better than the state as a whole with higher levels of residents with education beyond high school. There are high levels of employers advertising for jobs in business, management, marketing, and sales. However, some supply flows could be fine-tuned to be more in line with demand.

The data shows that in the area:

- There is an undersupply of students choosing Business, Management, and Administration; Hospitality and Tourism; Manufacturing; Transportation, Distribution, and Logistics; and Marketing, Sales and Service to meet Greenville's future demand.
- There is an oversupply of students choosing Arts, Audio/Video Technology and Communication; Health Science; Law, Public Safety, Corrections, and Security; and STEM that will far outpace the area's employment projections.
- Comprehensive soft skills training is needed for all students and job seekers (high school, post-secondary, adult, new and returning entrants to the labor force, and incumbent workers) so that they can not only get hired but retain their positions and thus reduce employee turnover.

Getting education more in line with the demands of employers will help the Greenville LWIA continue its "hard-earned momentum" and keep it as one of the areas of South Carolina with a bright future.