

Greenville County
Hospitality and
Tourism Industry
Analysis



South Carolina
Department of
Commerce



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TABLE OF CONTENTS

INTRODUCTION	5
METHODOLOGY	5
PRIMARY OCCUPATIONS	7
SKILLS AND EDUCATION	8
Reading Comprehension	8
Writing	8
Speaking	9
Mathematics	9
Education	10
LIVING WAGE	10
OCCUPATIONS WITH SIGNIFICANT OPPORTUNITIES	11
EMPLOYERS	12
Employers with 100 or More Employees	13
Appendix: Profiled Occupations	

INTRODUCTION

The South Carolina Department of Commerce Research Division appreciates the opportunity to assist Greenville County decision makers with additional information as follow-up to the Base Labor Market Analysis.

The hospitality and tourism sector was one of five sectors selected for additional study. The hospitality and tourism sector in Greenville County had 36,290 jobs in 2007. Approximately 15 percent of Greenville County's 237,000 jobs were in the hospitality and tourism sector.

This report provides the following information for the hospitality and tourism sector:

- Primary occupations used in the sector
- Skills and education needed for those occupations
- Earnings for those occupations including those that pay a living wage
- Projected growth and/or turnover for those occupations
- Major employers in the sector

METHODOLOGY

To define the hospitality and tourism sector, the following NAICS categories were included:

- Scheduled air transportation (4811)
- Taxi and limo service (4853)
- Scenic and sightseeing transportation (487)
- Auto rental (5321)
- Travel arrangement and reservation services (5615)
- Arts, entertainment and recreation (71)
- Accommodations (721)
- Food services and drinking places (722)

These categories listed above were used to develop employer lists, determine employment numbers in Greenville County, and to view occupational staffing patterns.

To estimate employment by occupation for hospitality and tourism in Greenville County, statewide occupational staffing patterns for that sector were applied to Greenville County hospitality and tourism industry employment estimates (staffing patterns are not available for counties). Industry employment estimates came from the Bureau of Labor Statistics' Quarterly Census of Employment and Wages. Staffing pattern data shows the percentage of jobs by occupation for an industry.

Occupational skills and education data were obtained from the national O*Net database. For the skills noted in this analysis, O*Net data ranking the level of the skill needed for each job was used. O*Net data is for occupations nationwide; it is not state or county specific.

For this analysis, the following skills were rated for each occupation:

- Reading Comprehension
- Writing
- Speaking
- Mathematics

To measure adequacy of wages, living wage models were explored. Several models were available utilizing reliable national data from sources such as the U.S. Census, U.S. Department of Commerce Bureau of Economic Analysis, U.S. Department of Labor Bureau of Labor Statistics, U.S. Department of Agriculture, U.S. Department of Housing and Urban Development, and the Children's Defense Fund.

The model utilized for this analysis was developed by Pennsylvania State University using the sources listed above. The model provided data up to 2004 by area. That data was adjusted for inflation using the 2008 Consumer Price Index for All Urban Consumers. Based on this data, a family consisting of one adult and one child would need an annual salary of \$31,477, or an hourly wage of \$15.13, as a living wage in Greenville County. The hourly wage was determined by dividing the annual salary by 2,080 hours.

To determine whether there were significant employment opportunities for the occupations examined, both growth prospects and turnover were identified.

Occupations with projected growth of 100 or more from 2006-2016 in Greenville County were categorized as high-growth jobs. The source for this data came from Economic Modeling Specialists Inc (EMSI). Occupations for which 70 percent or more of their annual job openings were due to replacement needs (based on statewide data) were identified as high-turnover jobs. For all jobs in South Carolina, turnover accounts for 59 percent of annual openings. South Carolina Department of Commerce 2006-2016 projections data was the source for turnover.

PRIMARY OCCUPATIONS

For this analysis, the following characteristics were determined for occupations with 100 or more employees in Greenville County’s hospitality and tourism sector:

- 2007 employment,
- Median wage (for Greenville County),
- Skills and education typically needed to perform the job,
- The determination whether the occupation has a living wage for Greenville County, and
- The probability that the job will experience growth and/or high turnover.

For the hospitality and tourism sector, 41 occupations have 100 or more employees. Below are the 10 occupations with the highest employment in the sector in Greenville County. A list of all occupations with employment of at least 100 along with their characteristics can be found in the appendix.

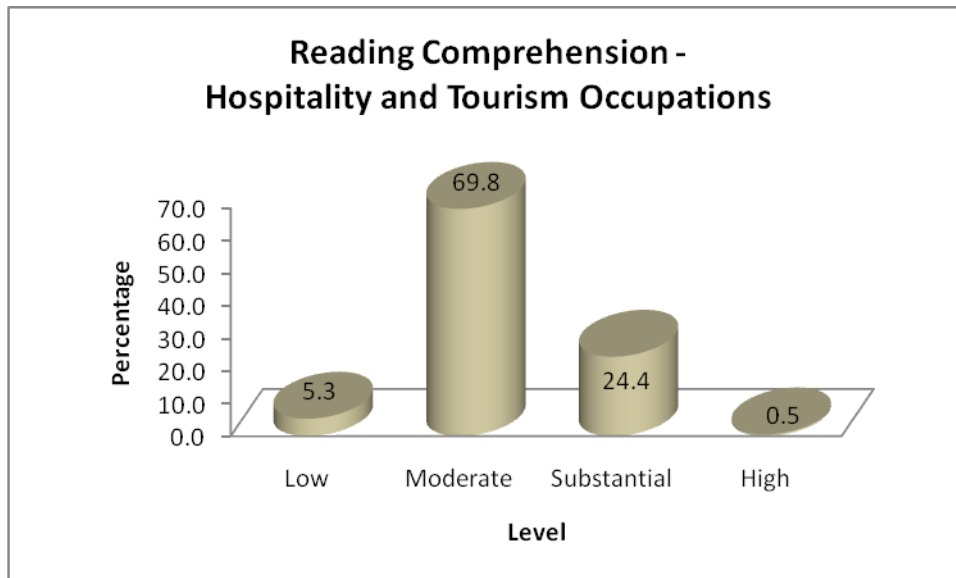
Occupation	Median Wage	Estimated Employment
Waiters and Waitresses	\$6.85	6,320
Combined Food Preparation and Serving Workers (including fast food)	\$7.26	4,325
Cooks, Fast Food	\$7.64	2,248
Cooks, Restaurant	\$9.52	2,158
Maids and Housekeeping Cleaners	\$8.41	1,724
Supervisors/Managers of Food Preparation and Serving Workers	\$13.08	1,596
Food Preparation Workers	\$8.87	1,353
Cashiers	\$7.69	1,325
Dishwashers	\$7.32	1,107
Counter Attendants, Cafeteria, Food Concession and Coffee Shop	\$7.03	951

Source: EMSI, SC Department of Commerce.

SKILLS AND EDUCATION

Reading Comprehension

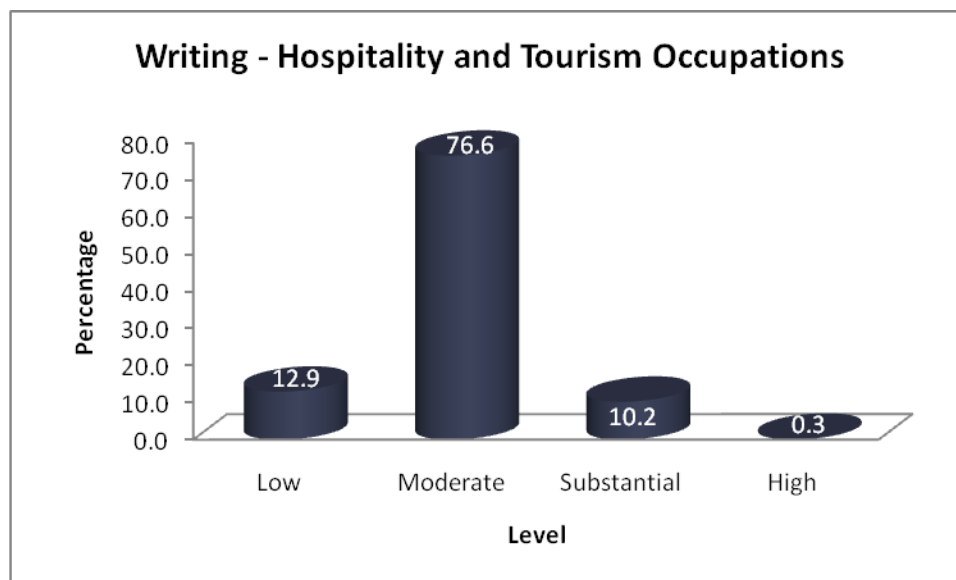
Nearly 70 percent of Greenville's hospitality and tourism jobs require only a moderate level of reading comprehension.



Source: SC Department of Commerce, US Department of Labor (O*Net).

Writing

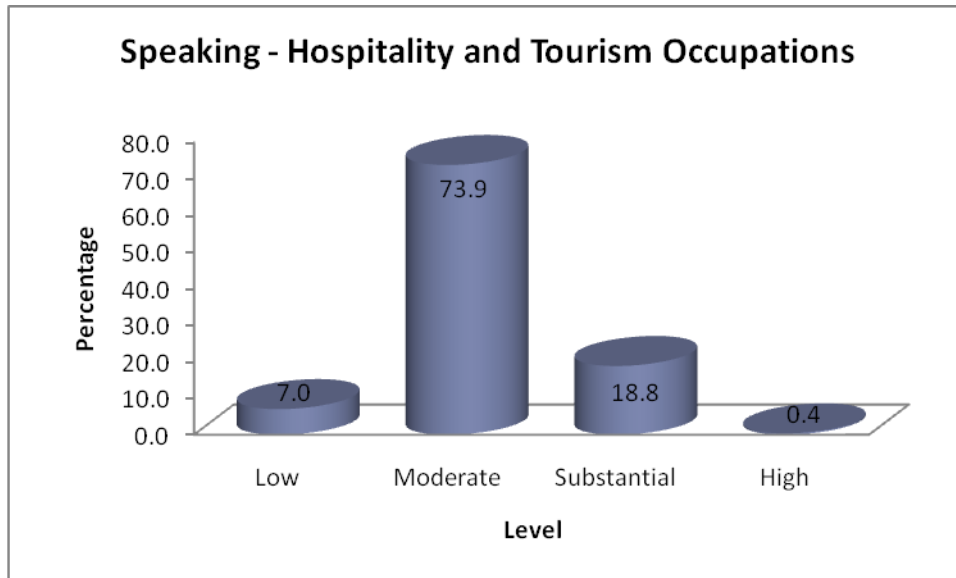
Greenville's hospitality and tourism jobs also require a moderate level of writing skill.



Source: SC Department of Commerce, US Department of Labor (O*Net).

Speaking

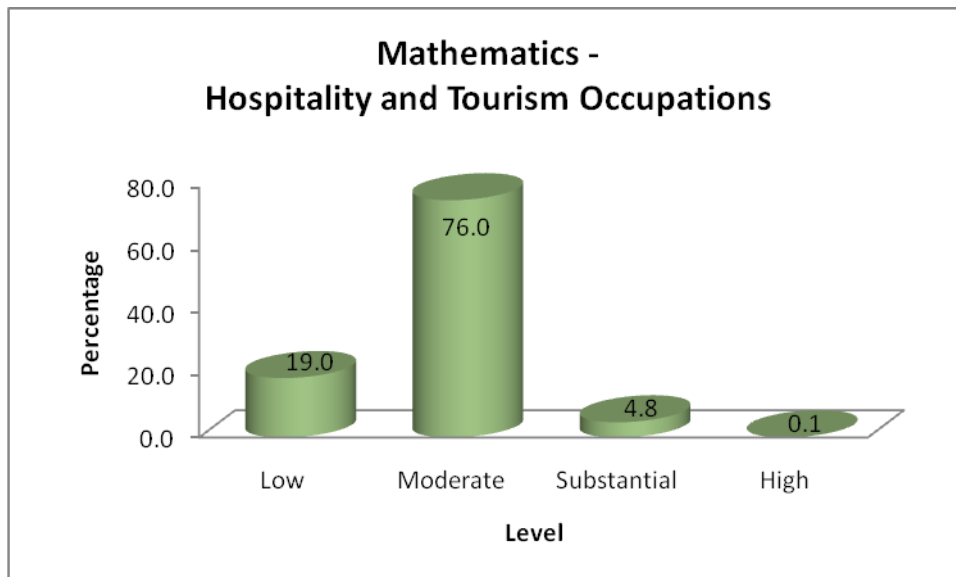
A moderate amount of speaking ability is needed for Greenville's hospitality and tourism jobs.



Source: SC Department of Commerce, US Department of Labor (O*Net).

Mathematics

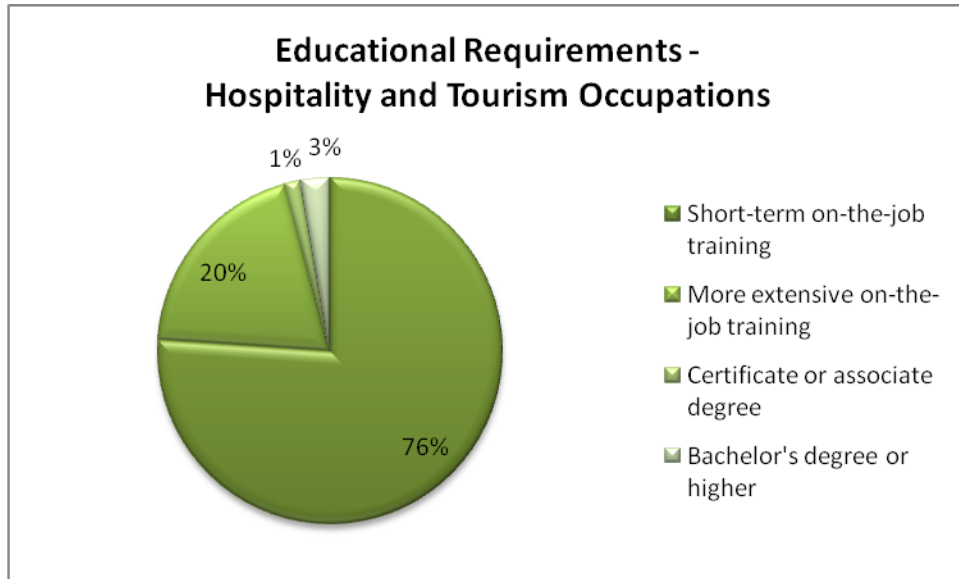
Moderate levels of mathematics are needed for Greenville's hospitality and tourism jobs.



Source: SC Department of Commerce, US Department of Labor (O*Net).

Education

The majority of occupations in the hospitality and tourism sector require only short-term on-the-job training, providing many people the opportunity to enter the industry.



Source: SC Department of Commerce, US Department of Labor (O*Net).

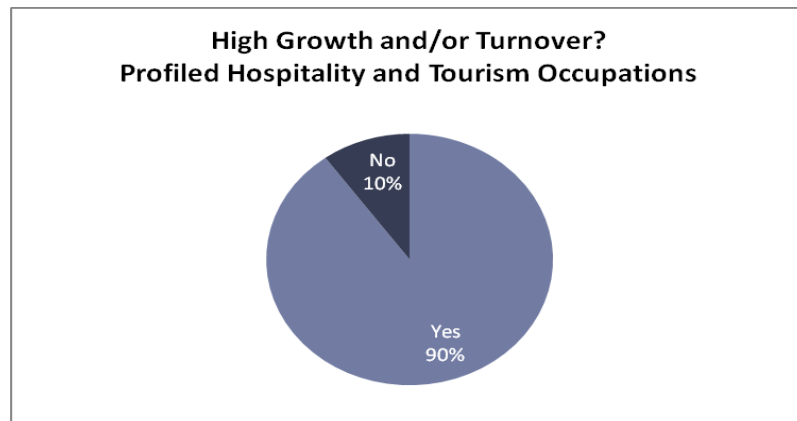
LIVING WAGE JOBS

Within the 41 profiled occupations, no occupations meet or exceed the living wage described in the methodology section on page 5.

OCCUPATIONS WITH SIGNIFICANT OPPORTUNITIES

Specific jobs with high projected growth and/or high turnover are listed directly below. As the chart below demonstrates, 36 (90 percent) of the 41 profiled hospitality and tourism occupations have high projected growth and/or high turnover. (Please see “Methodology” for an explanation of what constitutes high growth and turnover for this analysis)

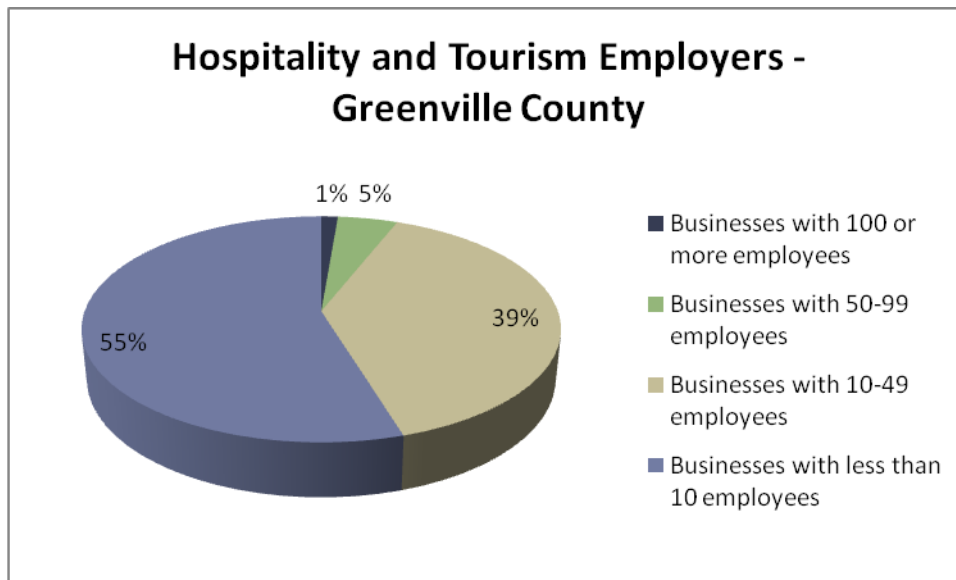
- Waiters and Waitresses
- Combined Food Preparation and Serving Workers (including fast food)
- Cooks, Fast Food
- Cooks, Restaurant
- Maids and Housekeeping Cleaners
- Supervisors/Managers of Food Preparation and Serving Workers
- Food Preparation Workers
- Cashiers
- Dishwashers
- Counter Attendants, Cafeteria, Food Concession and Coffee Shop
- Hosts and Hostesses, Restaurant, Lounge and Coffee Shop
- Cooks, Short Order
- Bartenders
- Dining Room and Cafeteria Attendants and Bartender Helpers
- Hotel, Motel and Resort Desk Clerks
- Amusement and Recreation Attendants
- Landscaping and Groundskeeping Workers
- Driver/Sales Workers
- Food Servers, Nonrestaurant
- Food Service Managers
- General Maintenance and Repair Workers
- Chefs and Head Cooks
- Cooks, Institution and Cafeteria
- Janitors and Cleaners (except maids and housekeeping cleaners)
- General Office Clerks
- Retail Salespersons
- Bookkeeping, Accounting and Auditing Clerks
- Customer Service Representatives
- Counter and Rental Clerks
- Supervisors/Managers of Housekeeping and Janitorial Workers
- Child Care Workers
- Supervisors/Managers of Office and Administrative Support Workers
- Secretaries (except legal, medical and executive)
- Reservation and Transportation Ticket Agents and Travel Clerks
- Receptionists and Information Clerks
- Baggage Porters and Bellhops



Sources: EMSI, SC Department of Commerce.

EMPLOYERS

The Research Division utilized two national business databases, Dun & Bradstreet and InfoUSA, to come up with a list of hospitality and tourism employers in Greenville County. These two sources showed 2,524 hospitality and tourism businesses in Greenville County, employing from 1 to 500 people. About 1 percent, or 33, hospitality and tourism companies employed 100 or more people. The chart below breaks down the hospitality and tourism employer size in Greenville County.



Source: Dun & Bradstreet and infoUSA.

The list below gives detailed information for the 33 hospitality and tourism businesses with 100 or more employees.

Greenville County Hospitality and Tourism Firms with 100 or More Employees

Company Name	City	Business Description	Employees
Saffron's at Suntrust	Greenville	Full-Service Restaurant	500
Hyatt Greenville Corp	Greenville	Hotels And Motels	275
Volume Services Inc	Greenville	Food And Beverage Catering	250
Ryan's Restaurant Group Inc	Greer	Restaurant Management	200
Embassy Suites	Greenville	Hotels & Motels	190
Atrium Hotels, LP	Greenville	Hotel/Motel Operation Public Golf Course Drinking Place Eating Place	160
Crowne Plaza - Greenville	Greenville	Hotels & Motels	156
Gmri Inc	Greenville	Eating Place	150
Hilton - Greenville	Greenville	Hotels & Motels	150
Pebble Creek Club	Taylors	Golf Courses - Private	150
Westin Poinsett	Greenville	Hotel/Motel Operation Eating Place	150
Holiday Inn - Greenville I-85	Greenville	Hotels & Motels	145
Cracker Barrel Old Country Store	Piedmont	Full-Service Restaurant	140
Olive Garden Italian Restaurant	Greenville	Full-Service Restaurant	140
Tr Operations of Greenville	Greenville	Steakhouse Restaurant	140
JHM Hotels LLC	Greenville	Hotel/Motel Operation	130
Texas Roadhouse	Taylors	Full-Service Restaurant	130
Olive Garden Italian Restaurant	Greenville	Full-Service Restaurant	120
Ruby Tuesday	Simpsonville	Full-Service Restaurant	120
TGI Friday's Inc	Greenville	Restaurant-Fam Chain	120
Red Lobster	Greenville	Full-Service Restaurant	115
Red Robin Gourmet Burgers	Greenville	Full-Service Restaurant	110
Sabar Inc	Greenville	Eating Place Automobile Parking Ret Misc Apparel/Access Ret Women's Clothing	101
Crown Plaza Hotel	Greenville	Hotel/Motel Operation	100
Flat Rock Grill	Greenville	Full-Service Restaurant	100
Greenville Sports Club	Greenville	Health Clubs, Studios, & Gymsnasiums	100
Logan's Roadhouse Inc	Greenville	Eating Place	100
Marriott - Greenville	Greenville	Hotels & Motels	100
Peabody Hotel Group LLC	Greenville	Hotel/Motel Operation	100
Peace Center of Performing Arts	Greenville	Theatres - Live	100
Phoenix Inn Inc	Greenville	Hotel/Motel Operation	100
Steak & Ale Restaurant	Greenville	Full-Service Restaurant	100
World Indoor Sports Inc	Greenville	Membership Sport/Recreation Club Ret Misc Apparel/Accessories	100

Source: Dun & Bradstreet and infoUSA.

Appendix: Profiled Hospitality & Tourism Occupations

Title	Standard Occupational Code	Median Wage	Employment	Reading Comprehension	Active Listening	Writing	Speaking	Mathematics	Education	High Growth?	High Turnover?
Waiters & Waitresses	353031	6.85	6,320	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	Yes
Combined Food Preparation & Serving Workers (including fast food)	353021	7.26	4,325	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	No
Cooks, Fast Food	352011	7.64	2,248	Moderate	Moderate	Moderate	Moderate	Low	Short-term on-the-job training	Yes	Yes
Cooks, Restaurant	352014	9.52	2,158	Moderate	Moderate	Low	Moderate	Moderate	Long-term on-the-job training	Yes	Yes
Maids & Housekeeping Cleaners	372012	8.41	1,724	Moderate	Moderate	Moderate	Moderate	Low	Short-term on-the-job training	Yes	No
Supervisors/Managers of Food Preparation & Serving Workers	351012	13.08	1,596	Substantial	Moderate	Moderate	Substantial	Moderate	Work experience in a related occupation	Yes	No
Food Preparation Workers	352021	8.87	1,353	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	Yes
Cashiers	412011	7.69	1,325	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	Yes

Title	Standard Occupational Code	Median Wage	Employment	Reading Comprehension	Active Listening	Writing	Speaking	Mathematics	Education	High Growth?	High Turnover?
Dishwashers	359021	7.32	1,107	Low	Low	Low	Low	Low	Short-term on-the-job training	No	Yes
Counter Attendants, Cafeteria, Food Concession & Coffee Shop	353022	7.03	951	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	Yes
Hosts & Hostesses, Restaurant, Lounge & Coffee Shop	359031	7.39	857	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	No	Yes
Cooks, Short Order	352015	9.20	817	Moderate	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	No	Yes
Bartenders	353011	8.04	777	Substantial	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	No	Yes
Dining Room & Cafeteria Attendants & Bartender Helpers	359011	7.10	725	Low	Low	Low	Low	Low	Short-term on-the-job training	No	Yes
Hotel, Motel & Resort Desk Clerks	434081	9.61	722	Substantial	Substantial	Moderate	Moderate	Moderate	Short-term on-the-job training	No	Yes
Amusement & Recreation Attendants	393091	7.12	628	Substantial	Substantial	Moderate	Substantial	Moderate	Short-term on-the-job training	No	Yes
Landscaping & Groundskeeping Workers	373011	10.16	560	Moderate	Substantial	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	No

Title	Standard Occupational Code	Median Wage	Employment	Reading Comprehension	Active Listening	Writing	Speaking	Mathematics	Education	High Growth?	High Turnover?
General & Operations Managers	111021	35.92	477	Substantial	Substantial	Substantial	Substantial	Substantial	Bachelor's or higher degree, plus work experience	N/A	N/A
Driver/Sales Workers	533031	16.65	475	Substantial	Substantial	Moderate	Substantial	Moderate	Short-term on-the-job training	No	Yes
Food Servers, Nonrestaurant	353041	8.20	417	Moderate	Moderate	Moderate	Low	Low	Short-term on-the-job training	Yes	No
Food Service Managers	119051	26.32	372	Substantial	Substantial	Substantial	Substantial	Moderate	Work experience in a related occupation	Yes	Yes
General Maintenance & Repair Workers	499042	15.30	363	Substantial	Substantial	Moderate	Moderate	Moderate	Moderate-term on-the-job training	Yes	No
Chefs & Head Cooks	351011	14.95	336	Moderate	Moderate	Moderate	Moderate	Moderate	Work experience in a related occupation	No	Yes
Fitness Trainers & Aerobics Instructors	399031	10.50	320	Moderate	Substantial	Moderate	Substantial	Moderate	Postsecondary vocational award	No	No
Cooks, Institution & Cafeteria	352012	9.77	269	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate-term on-the-job training	Yes	Yes

Title	Standard Occupational Code	Median Wage	Employment	Reading Comprehension	Active Listening	Writing	Speaking	Mathematics	Education	High Growth?	High Turnover?
Janitors & Cleaners (except maids & housekeeping cleaners)	372011	8.12	224	Substantial	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	Yes	No
General Office Clerks	439061	11.88	198	Substantial	Substantial	Substantial	Moderate	Moderate	Short-term on-the-job training	Yes	No
Retail Salespersons	412031	10.01	189	Moderate	Moderate	Substantial	Substantial	Moderate	Short-term on-the-job training	Yes	No
Bookkeeping, Accounting & Auditing Clerks	433031	15.37	164	Substantial	Substantial	Substantial	Moderate	Substantial	Moderate-term on-the-job training	Yes	No
Customer Service Representatives	434051	14.25	161	Substantial	Substantial	Substantial	Substantial	Moderate	Moderate-term on-the-job training	Yes	No
Counter & Rental Clerks	412021	8.85	158	Moderate	Moderate	Low	Moderate	Moderate	Short-term on-the-job training	Yes	No
Supervisors/Managers of Housekeeping & Janitorial Workers	371011	11.19	140	Substantial	Substantial	Substantial	Substantial	Substantial	Work experience in a related occupation	Yes	No
Child Care Workers	399011	7.05	132	Substantial	Substantial	Substantial	Substantial	Moderate	Short-term on-the-job training	Yes	Yes
Security Guards	339032	12.22	125	Substantial	Substantial	Substantial	Substantial	Moderate	Short-term on-the-job training	No	No

Title	Standard Occupational Code	Median Wage	Employment	Reading Comprehension	Active Listening	Writing	Speaking	Mathematics	Education	High Growth?	High Turnover?
Supervisors/Managers of Office & Administrative Support Workers	431011	20.14	123	Substantial	Substantial	Substantial	Substantial	Substantial	Work experience in a related occupation	Yes	No
Secretaries (except legal, medical & executive)	436014	13.97	122	Substantial	Substantial	Substantial	Substantial	Moderate	Moderate-term on-the-job training	Yes	No
Reservation & Transportation Ticket Agents & Travel Clerks	434181	15.09	119	Substantial	Substantial	Moderate	Substantial	Moderate	Short-term on-the-job training	No	Yes
Receptionists & Information Clerks	434171	11.27	110	Substantial	Substantial	Substantial	Substantial	Moderate	Short-term on-the-job training	Yes	No
Baggage Porters & Bellhops	396011	7.53	98	Substantial	Moderate	Moderate	Moderate	Moderate	Short-term on-the-job training	No	Yes
Musicians & Singers	272042	8.31	96	Moderate	Moderate	Low	Moderate	Low	Long-term on-the-job training	No	No
Recreation Workers	399032	11.47	96	High	Substantial	Substantial	Substantial	Moderate	Short-term on-the-job training	No	No

Occupations pay above the living wage of \$15.13 per hour.

Sources: Economic Modeling Specialists Inc., U.S. Department of Labor (O*Net) and S.C. Department of Commerce.



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