Center for Business Analytics and Community Research
UNIVERSITY OF SOUTH CAROLINA UPSTATE

2026 Upstate Workforce & Talent Report

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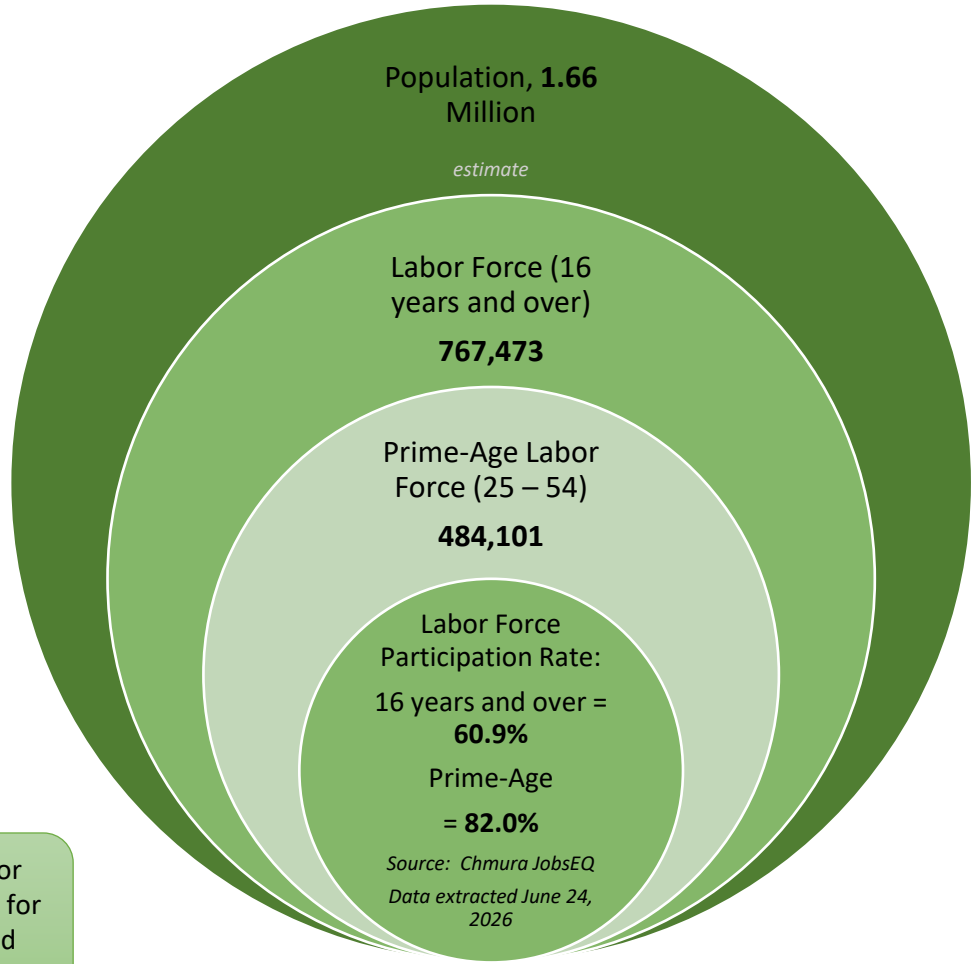
Population and Talent Market

The Upstate region of South Carolina is generally considered to include the 10 counties in the northwest region of the state. The counties include Abbeville, Anderson, Cherokee, Greenwood, Greenville, Laurens, Oconee, Pickens, Spartanburg, and Union Counties. As noted in the visualization to the right, the region now has an estimated population of approximately 1.66 million residents. This estimate has increased by nearly 70,000 residents since the release of the 2025 Upstate Workforce & Talent Report, more than doubling the increase reported in the previous year (approximately 29,000) and reflecting continued growth across the region.

The labor force age 16 and older increased by an estimated 15,525 workers, reaching 767,473.

The labor force participation rate for residents age 16 and older remained unchanged at 60.9%. The prime-age labor force (ages 25–54) increased by 10,426 workers to 484,101. The prime-age labor force participation rate rose from 81.6% to 82.0%, indicating continued strength among the region's core working-age population.

The region appears positioned for continued population growth in the coming decade. The next slide in this report documents projected population changes by Upstate county.

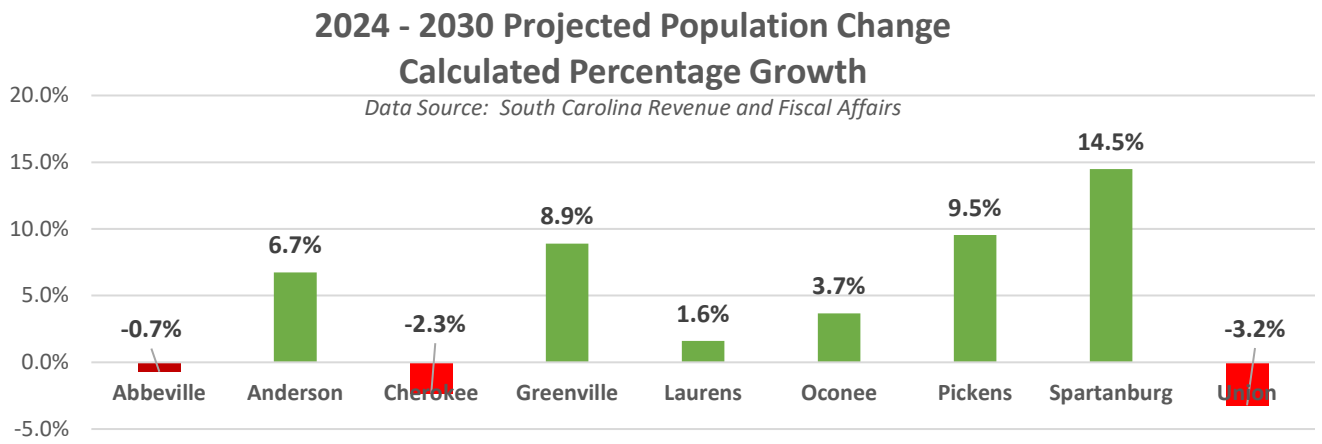


National rankings and migration trends continue to highlight the Upstate as an attractive destination for residents and businesses. Communities throughout Greenville and Spartanburg counties are recognized for their quality of life, employment opportunities, affordability, and amenities, helping support continued population growth and workforce expansion across the region.

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Population Projections for Upstate Counties

Population Projections To 2040 By County			
	Population 2024	2030 Projected Population	2040 Project Population
Abbeville	24,314	24,143	23,517
Anderson	214,337	228,790	253,959
Cherokee	55,747	54,449	51,420
Greenville	564,584	614,849	700,684
Laurens	68,386	69,476	70,459
Oconee	81,246	84,224	87,698
Pickens	137,830	150,983	173,805
Spartanburg	362,400	414,932	518,719
Union	26,496	25,642	23,873
Source: South Carolina Revenue and Fiscal Affairs			



The population projections presented in the table and figure to the left are unchanged from those reported in the 2025 *Upstate Workforce & Talent Report*. They are included again because they continue to provide valuable insight into the region's anticipated growth and the workforce, infrastructure, housing, and educational planning needed to accommodate that growth. The South Carolina Revenue and Fiscal Affairs Office has not yet released updated county-level population projections, although the agency has indicated that an update is forthcoming.

The projections continue to suggest significant population growth across much of the Upstate. Seven of the region's ten counties are expected to add residents through 2040, with several experiencing substantial increases. Spartanburg County is projected to experience the region's strongest growth, recording both the largest percentage increase and the greatest numeric gain in population through 2040**.** In contrast, Abbeville, Cherokee, and Union counties are forecast to experience modest population declines between 2024 and 2040.

The chart below illustrates projected population growth rates between 2024 and 2030. Spartanburg, Pickens, Greenville, and Anderson counties are projected to experience the most rapid growth during this period. Continued population expansion presents opportunities for economic development, workforce growth, and community investment. At the same time, accommodating this growth will require ongoing investment in transportation infrastructure, utility systems, housing, and educational resources to maintain the quality of life that continues to attract residents to the Upstate region

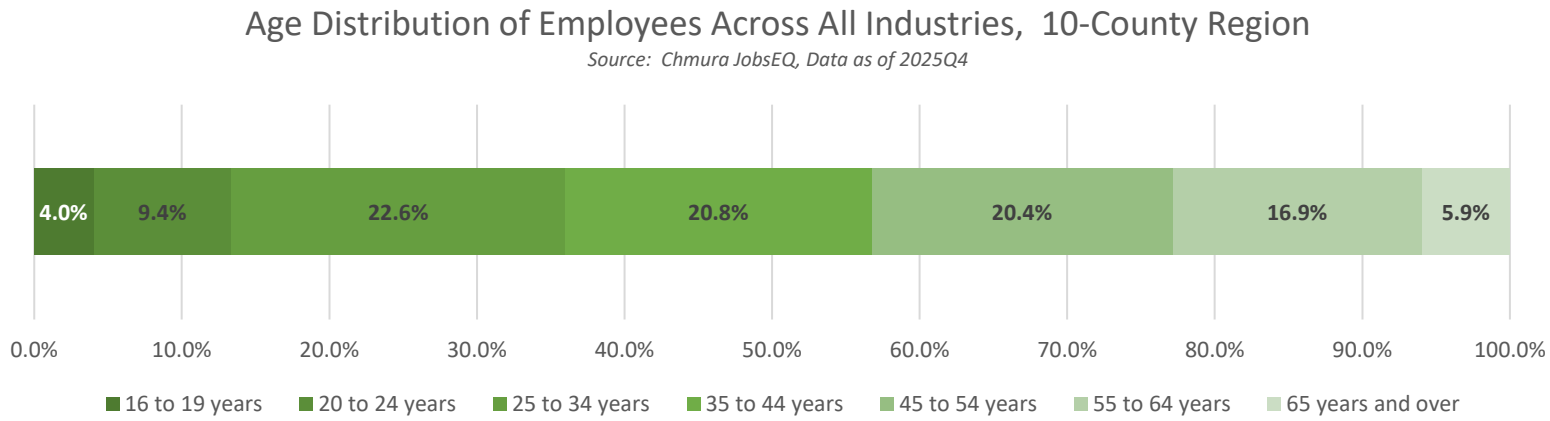
Data source: South Carolina Revenue and Fiscal Affairs Population Projections

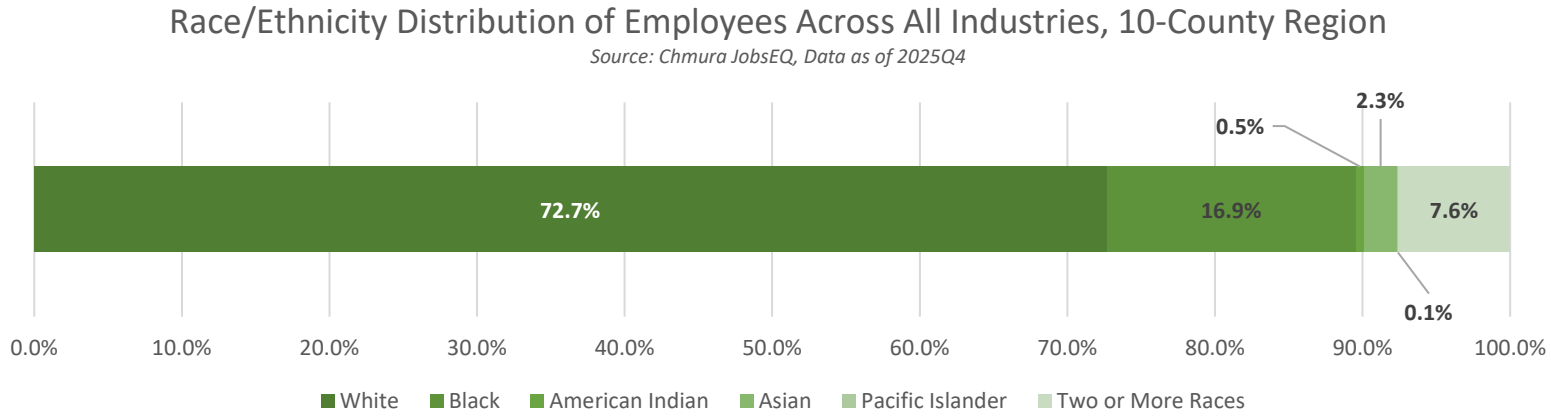
Workforce Demographics, 10-County Region

The age and racial distributions of the Upstate workforce are shown in the accompanying charts. The overall age profile of the workforce remains remarkably stable. Currently, 73.2% of workers are between the ages of 20 and 54, unchanged from the previous year. Workers aged 55 and older account for 22.8% of the workforce, down slightly from 23.0% in 2024, while the share of workers ages 16 to 19 increased modestly. The largest single age cohort remains workers ages 25 to 34, representing 22.6% of all employees. The 35-to-44 and 45-to-54 age groups account for an additional 20.8% and 20.4% of the workforce, respectively, meaning that workers in the prime working-age range of 25 to 54 comprise 63.8% of all employees in the region.

The racial composition of the workforce also remains relatively stable. Workers identifying as White account for 72.7% of all employees, compared to 73.6% in the previous year. The share identifying as Black or African American declined from 18.0% to 16.9%, while the percentage identifying as two or more races increased from 5.8% to 7.6%, continuing a gradual increase observed in recent years. The percentage of workers identifying as Asian remained essentially unchanged at 2.3%, compared to 2.2% in the previous year.

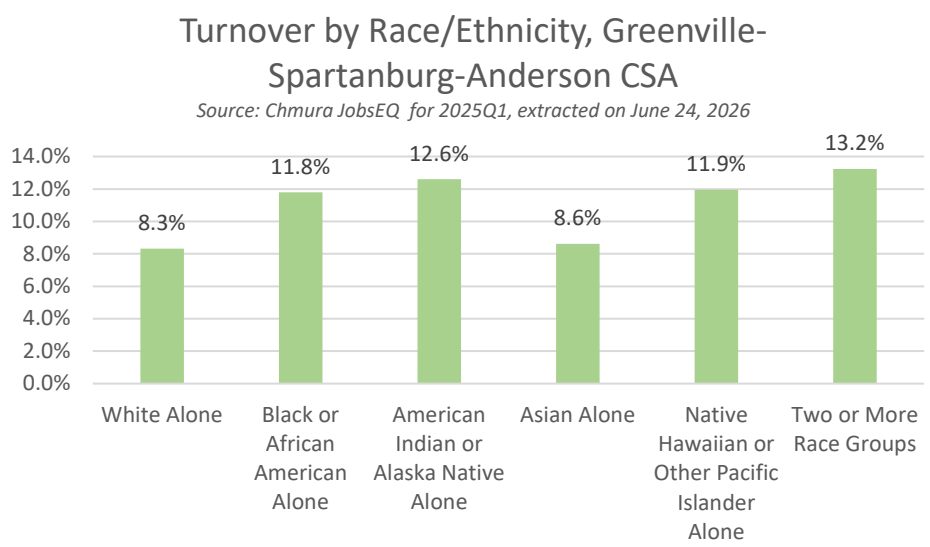
Overall, the Upstate workforce remains concentrated in its prime working-age years while exhibiting a gradual increase in racial diversity. These demographic characteristics will continue to shape workforce development, talent recruitment, and employer engagement strategies across the region.

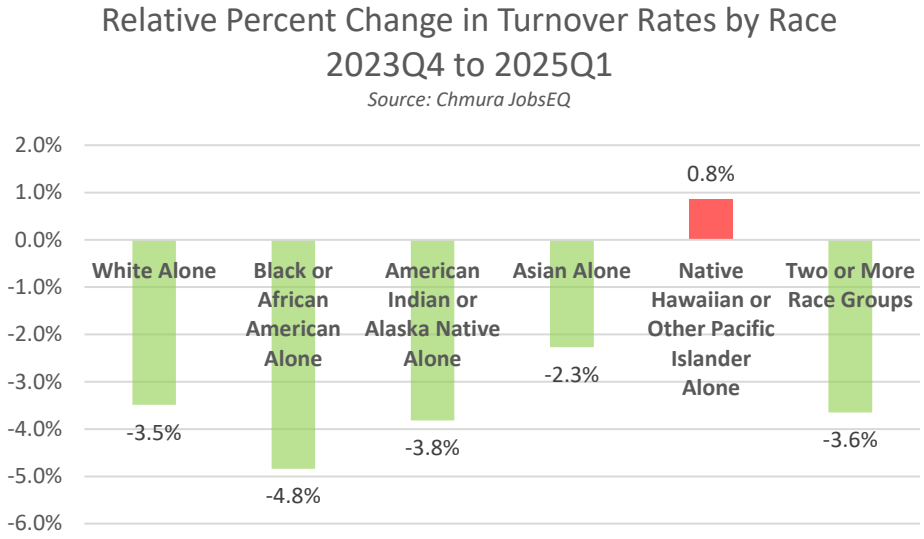




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Turnover Rates and Stable Job Salary by Race/Ethnicity



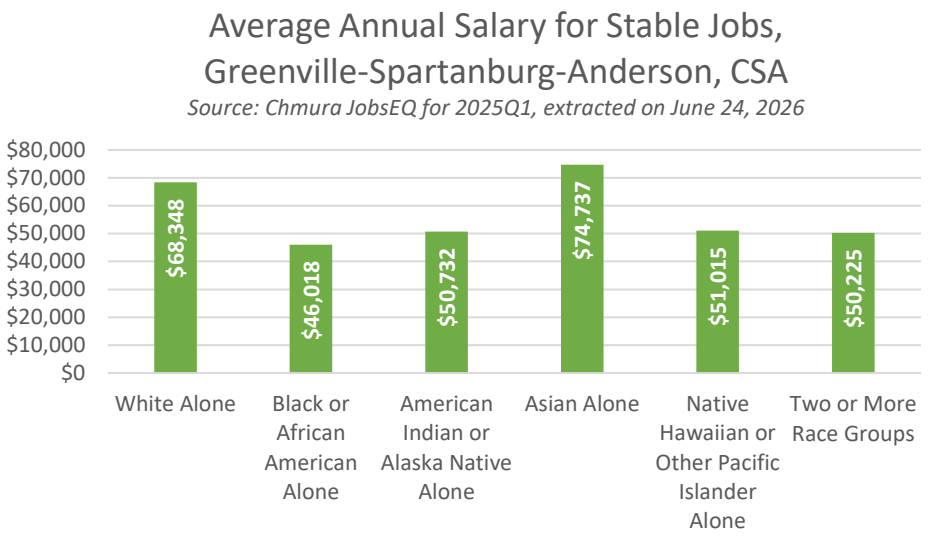


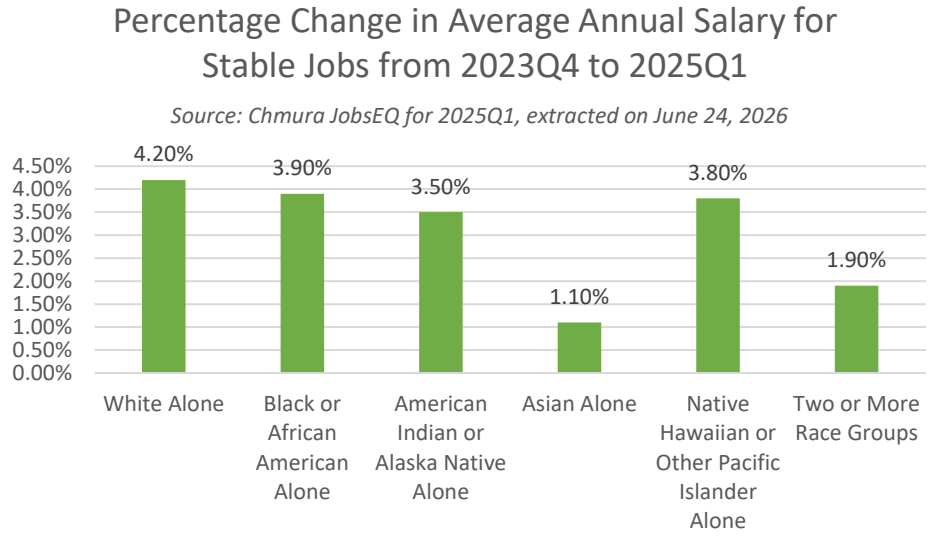
The chart on the left shows the most recent turnover rates by race across the Upstate's 10-county region, while the chart on the right illustrates the relative percent change in turnover rates between 2023Q4 and 2025Q1. Black or African American workers experienced the largest relative reduction in turnover (4.8%), followed by American Indian or Alaska Native workers (3.8%) and workers identifying as two or more races (3.6%). White workers experienced a 3.5% reduction, while Asian workers recorded the smallest decline at 2.3%.

These results indicate that turnover rates declined across most racial groups compared to the previous report, reflecting continued normalization in employee mobility following the elevated turnover observed during and immediately after the pandemic. This pattern is consistent with national labor market trends, as voluntary quits and overall turnover have generally returned toward pre-pandemic norms. The one exception in the Upstate region was the Native Hawaiian or Other Pacific Islander group, which experienced a slight increase (0.8%) in turnover. Because this group represents a very small share of the regional workforce, relatively small changes in employment levels can result in noticeable fluctuations in turnover rates from year to year.

The next slide presents changes in average annual salaries for stable employment by racial group.

Average Annual Salaries for Stable Jobs





Average annual salaries for workers in stable employment increased across all racial groups compared to last year's report, though the gains were considerably more modest than those observed in the prior period. White workers experienced the largest percentage increase at 4.2%, followed by Black or African American workers at 3.9%. Asian workers recorded the smallest increase at 1.1%.

Salary growth remained positive across every racial group, however, the pace of wage growth slowed noticeably relative to the previous report, when gains ranged from 5.6% to 16.2%. Although the current comparison spans a slightly longer period (2023Q4 to 2025Q1), salary increases were substantially smaller across every racial group, suggesting that wage growth has moderated even as labor market conditions remain favorable.

Income, Cost of Living, and Poverty Levels

Median Household Income

10-County Upstate	South Carolina	USA
$67,228	$69,324	$80,734

Source: Chmura Economic Overview, 10-County Upstate Region, Data extracted June 24, 2026

Cost of Living and Purchasing Power

Data for 2025Q4

	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
10-County Upstate Region	$59,167	89.5	$66,094
South Carolina	$61,774	91.0	$67,855
USA	$76,205	100.0	$76,205

Poverty Level (all People)

Greenville-Spartanburg-Anderson CSA	South Carolina	USA
14.1%	14.1%	12.5%

Source: Chmura JobsEQ Economic Overview, data extracted June 24, 2026

Median household income in the Upstate is $67,288, approximately 97% of South Carolina's median household income and 83% of the national median. While the Upstate's median household income remains below the national benchmark, it differs little from the statewide median.

The Upstate continues to benefit from the lowest cost of living among the three geographies, with a cost-of-living index of 89.5 compared to 91.0 statewide and 100.0 nationally. Even after adjusting for the region's lower cost of living, however, purchasing power remains below both the South Carolina and U.S. averages, reflecting comparatively lower annual wages.

The Upstate poverty rate is 14.1%, matching the statewide rate but remaining above the national rate of 12.5%. Taken together, these measures suggest that although the Upstate continues to offer an affordable cost of living, sustained wage growth will be important to improving purchasing power and reducing economic hardship for many households.

MIT Living Wage Estimates By Upstate County

source: MIT Living Wage Calculator, Data extracted July 2, 2026

Living Wage Calculations by County												
	1 Adult				2 Adults (1 Working)				2 Adults (Both Working)			
County	0 Children	1 Child	2 Children	3 Children	0 Children	1 Child	2 Children	3 Children	0 Children	1 Child	2 Children	3 Children
Abbeville	$18.96	$31.24	$39.78	$49.49	$26.63	$32.13	$34.47	$39.85	$13.26	$18.25	$21.95	$26.55
Anderson	$21.65	$35.99	$46.64	$57.67	$28.97	$34.22	$36.71	$42.12	$14.43	$20.60	$25.33	$30.10
Cherokee	$19.16	$30.49	$37.72	$46.14	$26.59	$31.31	$33.32	$38.18	$13.24	$17.79	$20.85	$25.02
Greenville	$23.11	$37.77	$49.01	$59.76	$30.93	$36.06	$38.70	$43.79	$15.40	$21.58	$26.43	$31.08
Greenwood	$18.64	$34.79	$44.52	$54.88	$26.51	$31.89	$33.89	$38.51	$13.21	$19.93	$24.24	$28.87
Laurens	$20.49	$32.71	$40.97	$49.78	$27.64	$33.78	$36.25	$40.68	$13.76	$18.96	$22.51	$26.64
Oconee	$19.34	$31.47	$39.85	$48.51	$26.78	$32.68	$35.27	$39.73	$13.34	$18.41	$22.03	$26.17
Pickens	$21.24	$35.57	$46.27	$56.26	$28.93	$33.88	$36.45	$40.96	$14.41	$20.43	$25.19	$29.52
Spartanburg	$21.69	$35.96	$46.61	$56.79	$29.24	$34.18	$36.66	$41.34	$14.56	$20.58	$25.30	$29.71
Union	$19.06	$30.98	$38.95	$47.26	$26.06	$31.77	$33.67	$38.30	$12.98	$17.95	$21.40	$25.45
Average	**$20.33**	**$33.70**	**$43.03**	**$52.65**	**$27.83**	**$33.19**	**$35.54**	**$40.35**	**$13.86**	**$19.45**	**$23.52**	**$27.91**

Source: MIT Living Wage Calculator, Living Wage Calculator Data extracted July 2, 2026

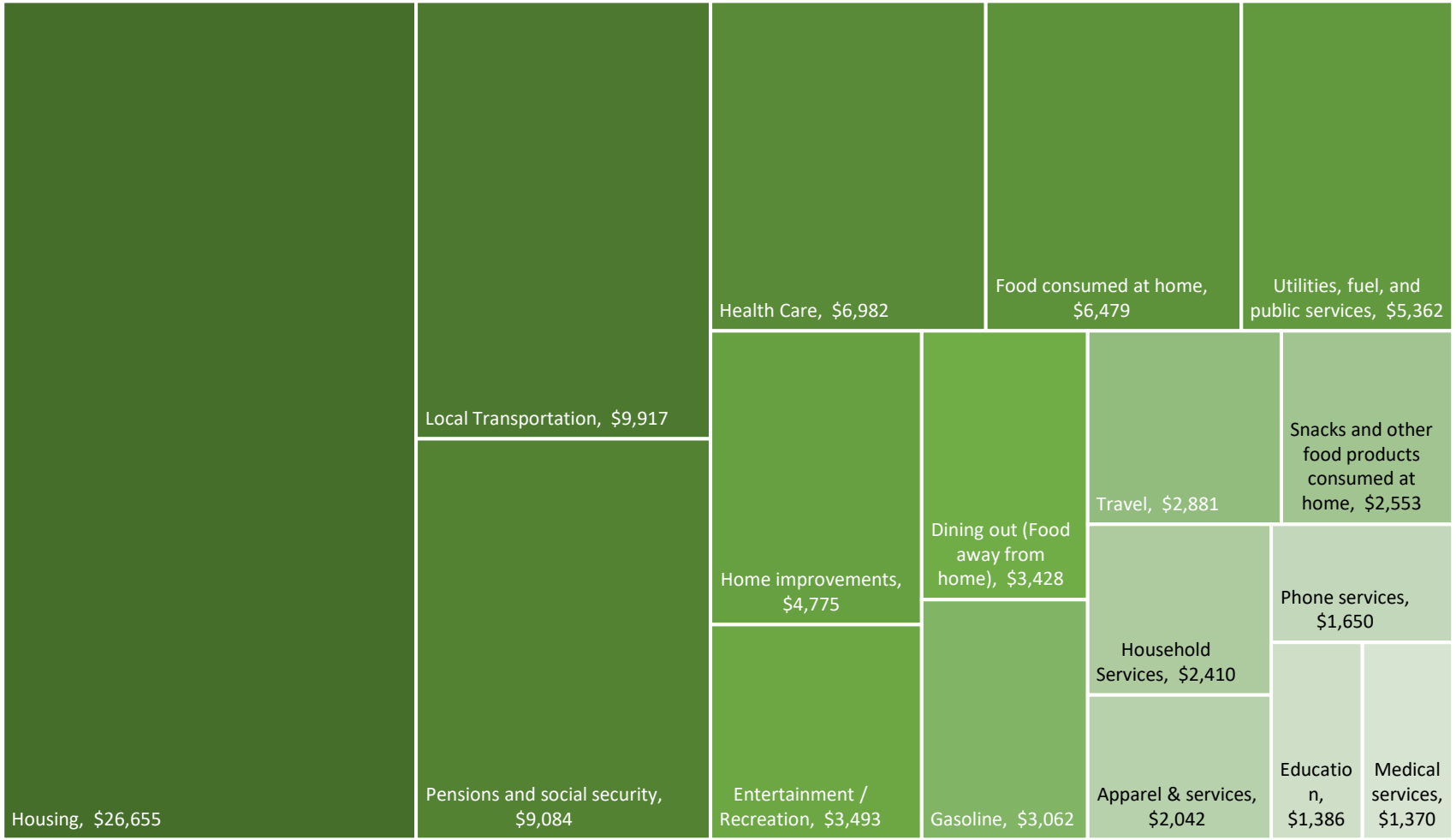
The minimum wage across all South Carolina counties remains at $7.25 per hour. However, when compared with figures from MIT's Living Wage Calculator, it is clear that this rate falls well short of providing a sustainable income for adult workers in the state.

Living wage estimates increase substantially as household size and the number of dependents grow. Across the ten-county region, a single adult with no children requires an average hourly wage of **$20.33**, while a single adult supporting three children requires **$52.65** per hour. Even in two-adult households where both adults are employed, each worker must earn an average of **$27.91** per hour to support a family with three children. Greenville County consistently records the highest living wage estimates among the region's counties, while Union and Abbeville generally report the lowest; however, differences among counties are modest compared to the substantial gap between prevailing living wage estimates and the current minimum wage.

This disparity highlights the importance of education, workforce development, and career advancement as key strategies for improving economic mobility and family well-being. Investing in talent development remains a critical regional policy priority.

Major Categories of Consumer Spending, Greenville-Spartanburg-Anderson CSA

Source: U.S. Census Bureau, Business Builder, Data Extracted on June 5, 2026



The accompanying chart summarizes household consumer spending in the Greenville–Spartanburg–Anderson CSA using data from the U.S. Census Bureau's Business Builder. Across the 10-county Upstate region, average annual household consumer spending reached **$84,291** in the most recent reporting period, representing an increase of approximately **$4,490** compared to the 2025 report.

Housing remains the largest household expenditure, accounting for **$26,655 annually**, or **32% of total household spending**. This amount is **2.7 times greater** than spending on the next largest category, **transportation**.

Consistent with findings from the 2025 report, **pensions and social security along with healthcare** continue to rank as the third- and fourth-largest spending categories, respectively. Together, housing, transportation, pensions and social security, and health care account for nearly two-thirds of annual household expenditures, underscoring the importance of wage growth in maintaining household financial stability.

Annual spending on **education** averaged less than **$1,400 per household**, representing just **1.6% of total expenditures**. As labor market demands continue to evolve, increased investment in education and workforce development—including **upskilling and reskilling initiatives**—may play a critical role in sustaining employability, enhancing productivity, and supporting long-term income growth.

Although not reported as a standalone expenditure category, **childcare costs averaged $455 annually per household**, underscoring an additional financial burden faced by working families.

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Education and Training Requirements

Educational Attainment, Ages 25 – 64

	10-County	South Carolina	USA
No High School Diploma	10.5%	9.2%	9.8%
High School Graduate	27.8%	27.2%	24.8%
Some College, No Degree	19.1%	20.1%	18.9%
Associate's Degree	10.8%	10.4%	9.2%
Bachelor's Degree	20.3%	21.0%	23.1%
Postgraduate Degree	11.4%	12.1%	14.2%

*Source: Chmura Economic Overview, 10-County Upstate Region, Data extracted **June 25, 2026***

Education and Training Requirements Across All Occupations

	10-County	South Carolina	USA
Short-term OJT, no exp, no award	37.3%	38.5%	37.0%
Moderate-term OJT, no exp, no award	17.5%	15.5%	13.5%
Long-term training, no exp, no award	3.7%	3.5%	3.6%
Previous work experience, no award	7.9%	8.2%	8.2%
2-year degree or certificate	8.8%	8.7%	8.3%
Bachelor's degree	20.5%	21.3%	24.8%
Postgraduate degree	4.3%	4.4%	4.7%

Source: Chmura JobsEQ Occupational Diversity, Data as of 2025Q1

Data from the Bureau of Labor Statistics for the first quarter of 2026 demonstrate the well-established relationship between educational attainment and median usual weekly earnings. The table immediately below presents these Q1 2026 figures.

Educational Attainment	Median Usual Weekly Earning (national level data)
Less than high school	$784
High school graduate, no college	$977
Some college or associate degree	$1,138
Bachelor's degree or higher	$1,763

Source: Bureau of Labor Statistics, Full-time workers 25 and over

Educational attainment in the 10-county Upstate region (ages 25–64) skews toward high school and sub-baccalaureate credentials relative to both South Carolina and the nation. While 89.5% of working-age residents hold at least a high school diploma, 38.3% have a high school education or less — higher than the state (36.4%) and the U.S. (34.6%). The region's comparative strength is in two-year credentials: at 10.8%, its associate's-degree share edges out both South Carolina (10.4%) and the nation (9.2%), reflecting the Upstate's strong technical-college network and advanced manufacturing base.

The gap widens at the four-year level. Just 31.7% of the region's working-age population holds a bachelor's degree or higher, trailing the state (33.1%) and falling 5.6 percentage points below the national figure of 37.3%. The difference is sharpest at the postgraduate level, where the Upstate's 11.4% lags the U.S. rate of 14.2%. Closing this baccalaureate-and-above gap remains an important objective for the region's long-term talent strategy.

Educational Awards

Awards from 10-County Upstate Region Colleges and Universities

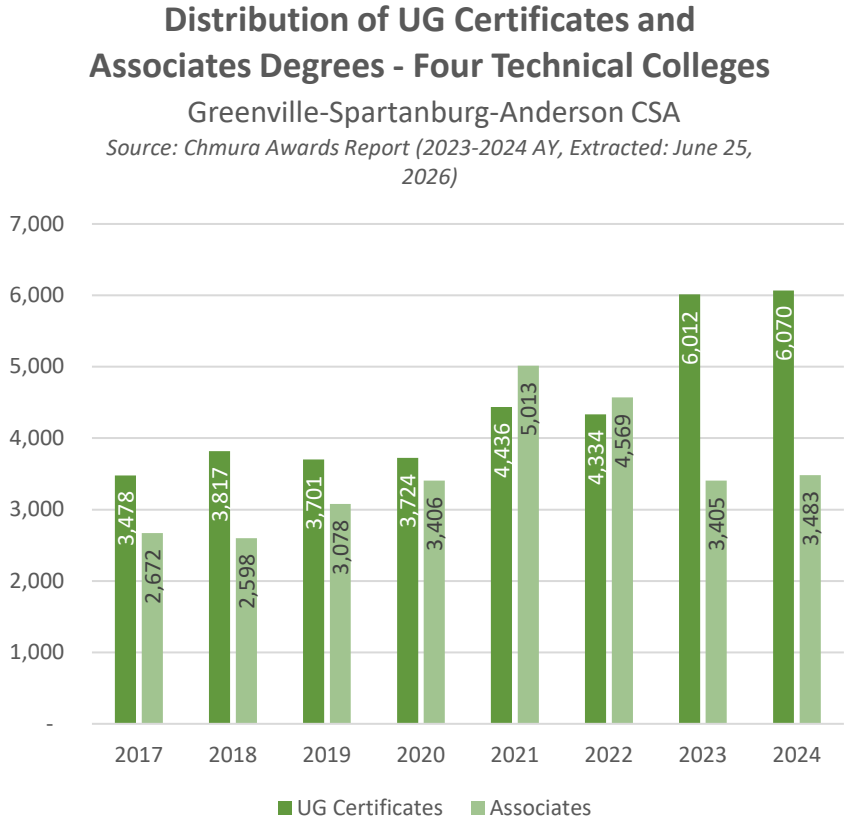
Certification < 1 year	5,803
Certificate 1+ but <2 year	1,557
Associate's Degree	4,025
Bachelor's Degree	11,584
Master's Degree	3,206
Doctorate	560
Other Post-Baccalaureate	646

Source: Chmura JobsEQ, 2023-2024 academic year. Data extracted on June 25, 2026

The value of postsecondary education continues to be reflected in workforce outcomes, with research consistently demonstrating that educational attainment is associated with higher earnings, lower unemployment, and greater career opportunities. The data presented on this page summarize degrees and certificates awarded by colleges and universities across the 10-county Upstate region during the 2023–2024 academic year, illustrating the breadth of the region's educational pipeline.

Bachelor's degrees remain the most common credential awarded, with regional institutions conferring 11,584 degrees during the academic year. Colleges and universities also awarded 5,803 certificates requiring less than one year of study, 1,557 certificates requiring one to two years of study, and 4,025 associate degrees. At the graduate level, institutions awarded 3,206 master's degrees, 560 doctoral degrees, and 646 additional post-baccalaureate credentials.

The chart to the right highlights undergraduate certificates and associate degrees awarded by the region's four technical colleges between 2017 and 2024. Following several years of growth, undergraduate certificate production exceeded associate degree production beginning in 2023 and remained higher in 2024. Certificate awards increased modestly from 6,012 to 6,070 during the most recent year, while associate degree production also increased slightly from 3,405 to 3,483. Together, these trends suggest continued strong interest in shorter-term workforce-focused credentials while reinforcing the important role technical colleges play in meeting the Upstate's evolving workforce needs.

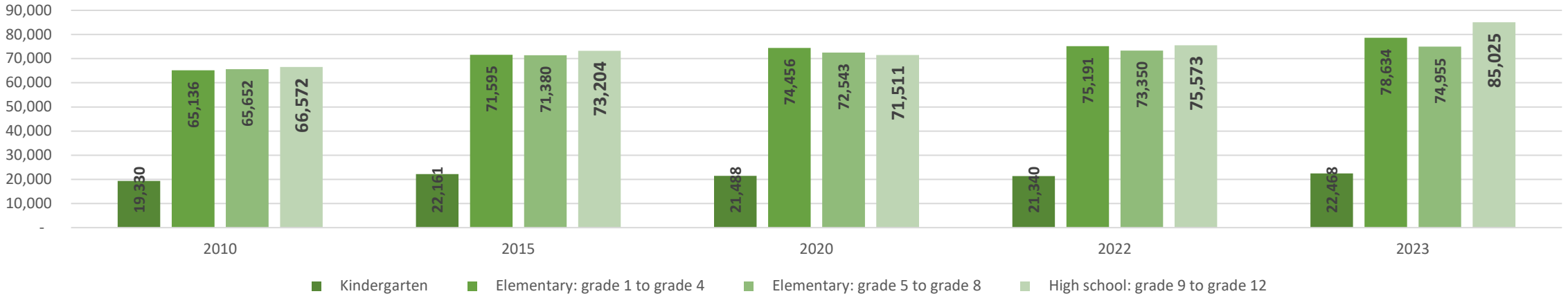


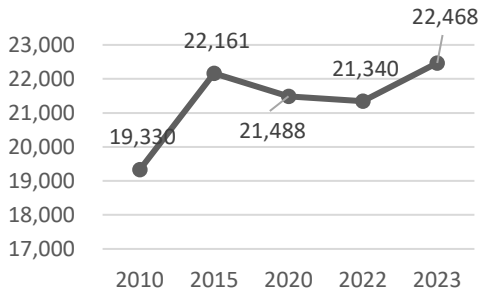
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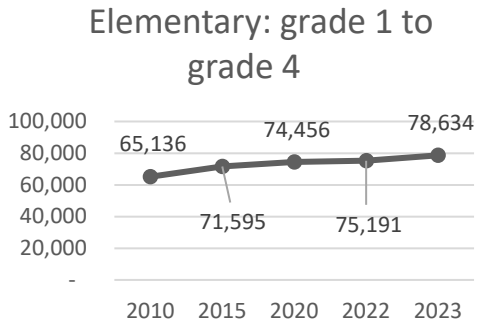
Educational Pipeline to College & Workforce

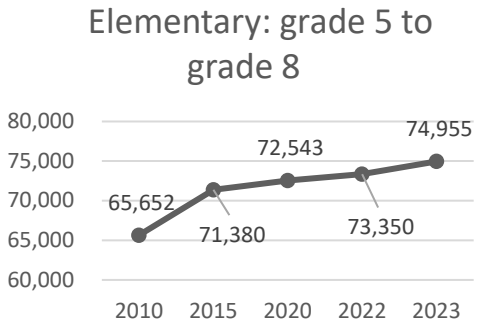
Greenville-Spartanburg-Anderson MSA

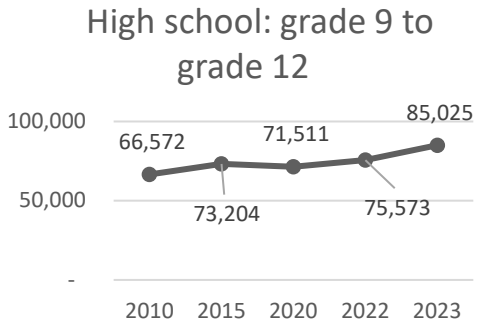
Source: U.S. Census, ACS Table S1401











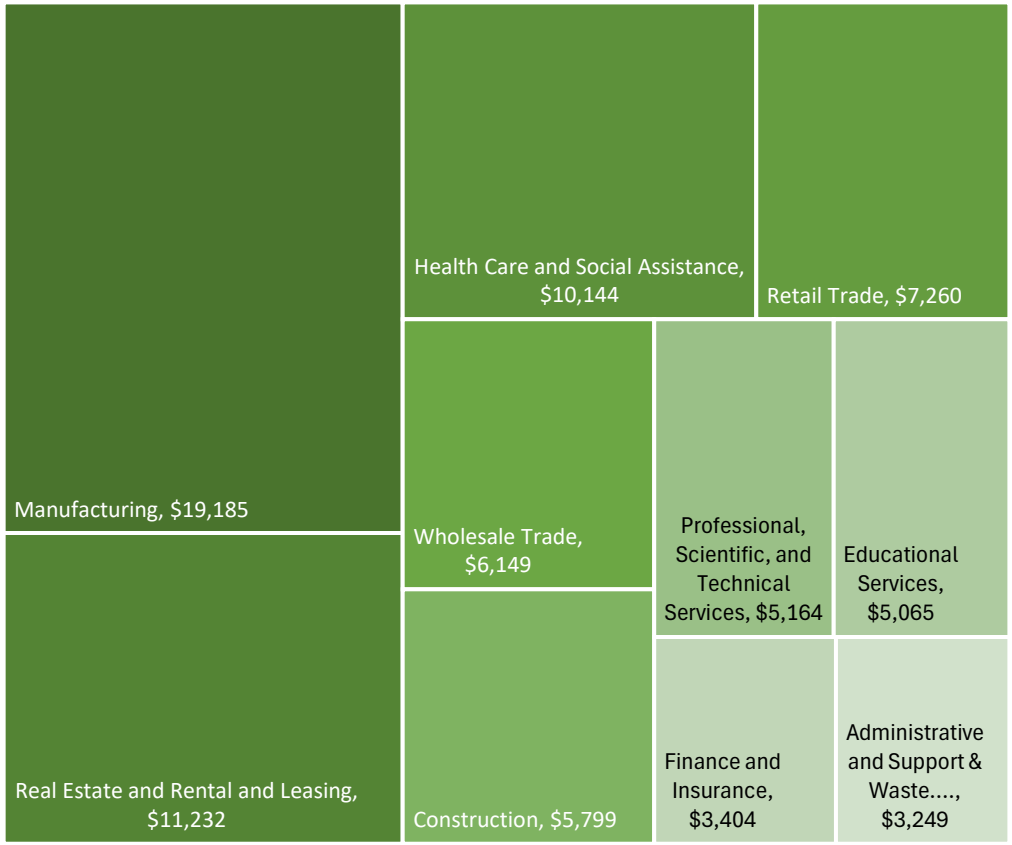
***NOTE**: The enrollment estimates presented on this page are unchanged from the previous report because the U.S. Census Bureau has not yet released updated data. Despite this, the figures continue to provide valuable insight into the long-term educational pipeline supporting the region's future workforce.*

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Upstate Output and Employment by Sector

Upstate GDP by Sector, Data Through 2024
In Millions

Source: Chmura Economic Overview



Manufacturing continues to anchor the Upstate economy, leading all sectors in both regional output ($19.2 billion) and employment (119,626 workers). Health Care and Social Assistance ranks second in employment, while Real Estate and Rental and Leasing is the region's second-largest contributor to economic output, illustrating that employment and economic output are not always closely aligned.

Total Employment by Major Economic Sector
Greenville-Spartanburg-Anderson CSA

Data as of 2025Q4

Source: Chmura JobsEQ

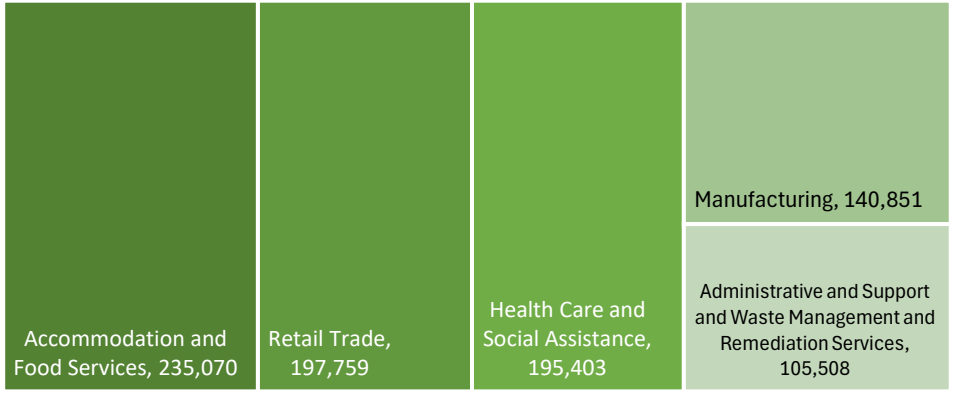


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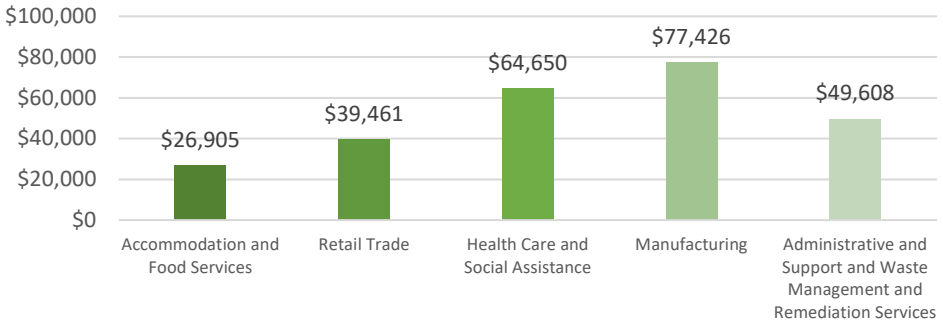
Top 5 Industry Sectors by 5-Year Forecasted Talent Demand

Source: Chmura JobsEQ 2025Q4



Top 5 Industry Sectors by Forecasted Talent Demand, Average Annual Wages

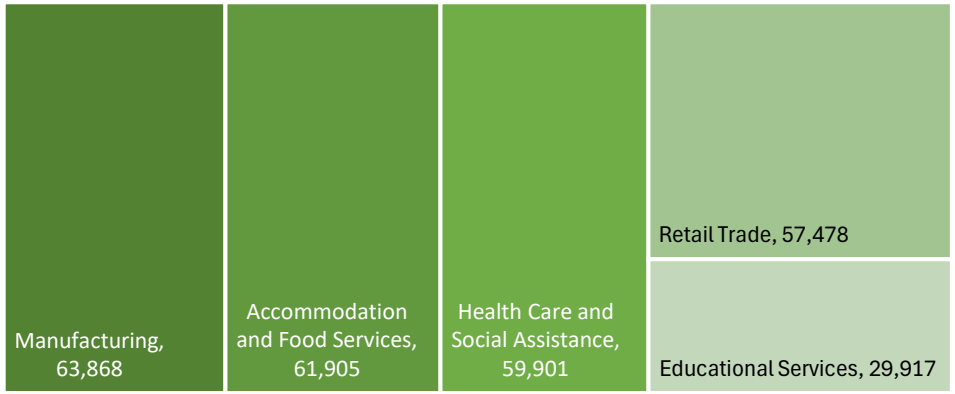
Source: Chmura JobsEQ 2025Q4



Greenville-Spartanburg-Anderson CSA

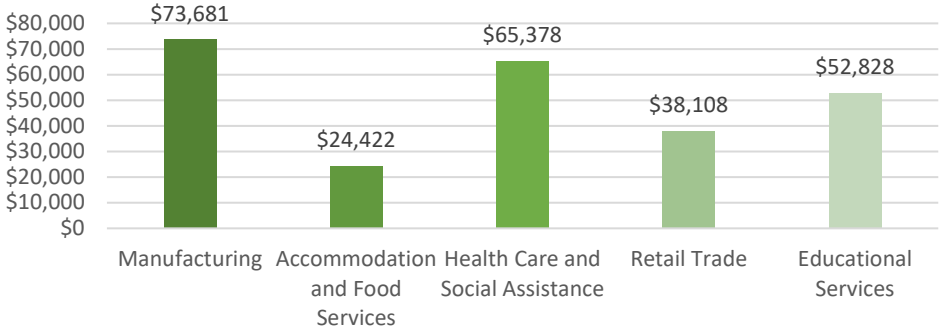
Top 5 Industry Sectors by 5-Year Forecasted Talent Demand

Source: Chmura JobsEQ 2025Q4



Top 5 Industry Sectors by Forecasted Talent Demand, Average Annual Wages

Source: Chmura JobsEQ 2025Q4



The five industry sectors projected to generate the greatest talent demand are largely consistent across South Carolina and the Greenville–Spartanburg–Anderson CSA, although the relative importance of those sectors differs. Health Care and Social Assistance, Retail Trade, and Accommodation and Food Services rank among the largest sources of projected talent demand in both geographies. However, Manufacturing is projected to be the largest source of talent demand in the Upstate, while Accommodation and Food Services remains the leading sector statewide.

The Upstate's industry mix also reflects its concentration in higher-wage industries. Manufacturing—the region's largest projected demand sector—offers the highest average annual wages of the five industries at approximately $73,700, followed by Health Care and Social Assistance at more than $65,000. Educational Services moved into the Upstate's top five projected demand industries this year, rising from sixth place in the previous report, replacing Administrative and Support and Waste Management and Remediation Services.

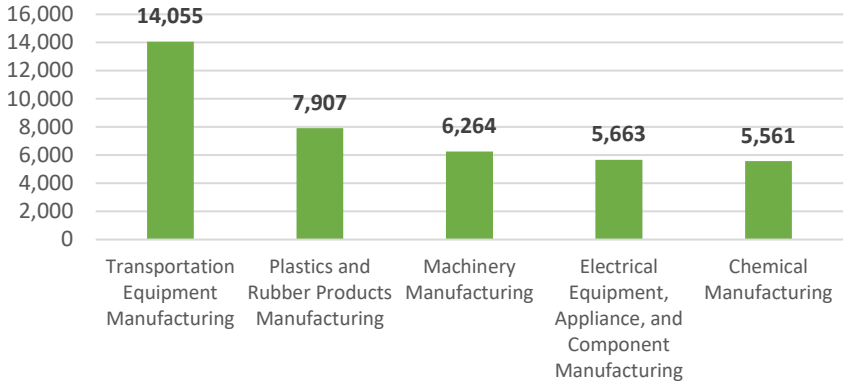
Overall, the Upstate's projected talent demand remains concentrated in industries that combine strong employment demand with comparatively higher wages.

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Manufacturing Sector

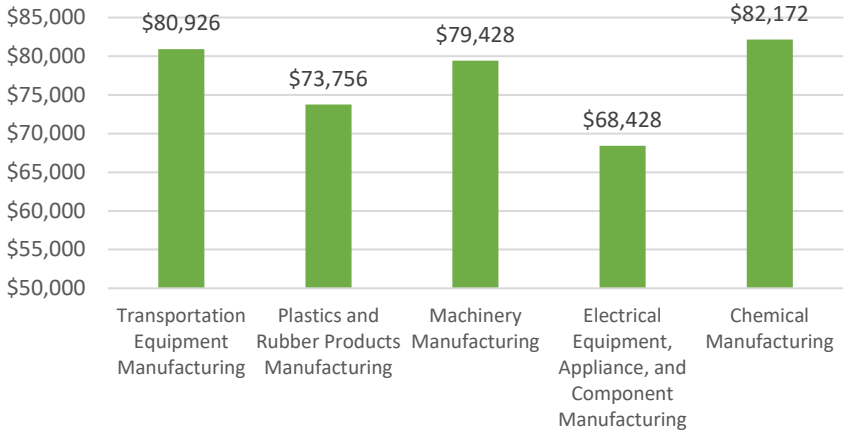
Top 5 Manufacturing Sectors, Ranked on 5-Year Forecasted Talent Demand

Source: Chmura JobsEQ 2025Q4



Current Average Annual Salary

Source Chmura JobsEQ 2025Q4



The Upstate's manufacturing sector employed 119,626 workers as of the fourth quarter of 2025, reinforcing its role as one of the Upstate's primary economic engines. Transportation Equipment Manufacturing remains the largest manufacturing subsector. Over the next five years, projected demand for workers in Transportation Equipment exceeds 14,000, accounting for both new positions and replacement needs. Although projected demand is modestly lower than last year's forecast, it is consistent with national expectations that manufacturing hiring is returning to more typical levels following the exceptionally tight labor market of recent years.

Other major manufacturing industries include Plastics and Rubber Products Manufacturing and Machinery Manufacturing, both of which continue to offer competitive wages. Average annual earnings rose over the past year to $73,756 and $79,428, respectively. Chemical Manufacturing is now the region's highest-paying manufacturing industry, with average annual earnings of $82,172, surpassing Transportation Equipment. Electrical Equipment, Appliance, and Component Manufacturing was the only major manufacturing industry to post a year-over-year decline in average wages, falling below $70,000.

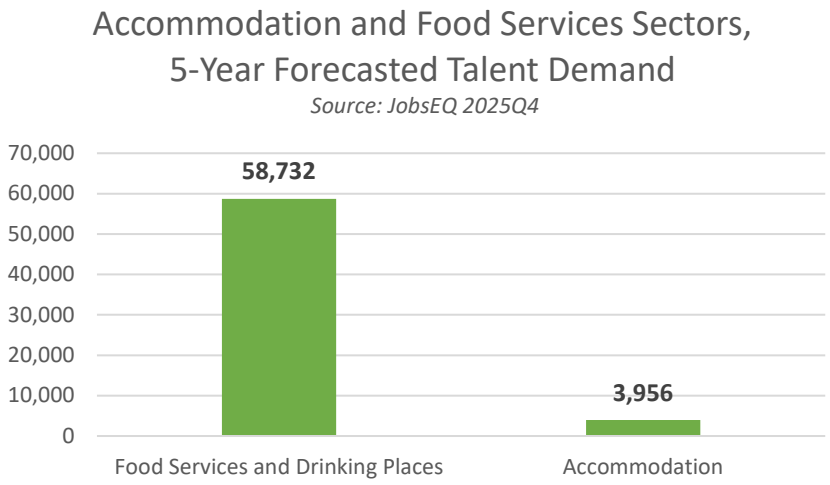
The table to the right highlights the five-year occupational forecast for manufacturing. Team Assemblers remain the occupation with the greatest projected demand, although hiring needs have moderated slightly from last year's forecast. Industrial Engineers continue to command the highest wages among the featured occupations, with average annual earnings now exceeding $100,000.

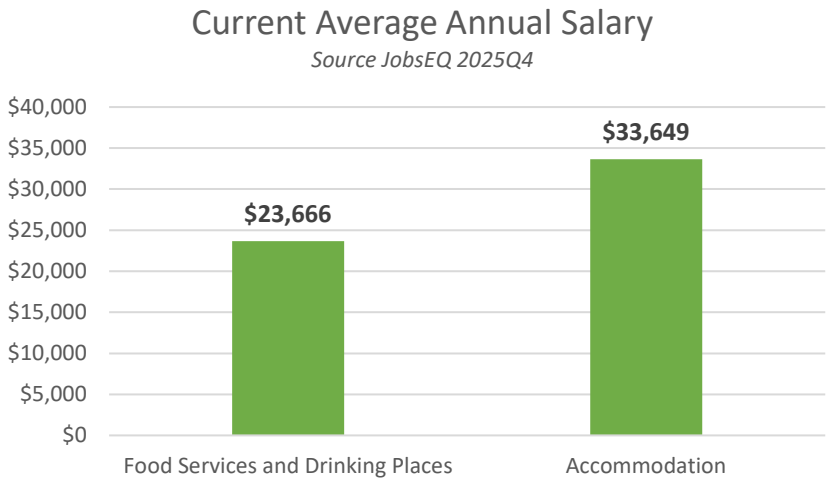
Top 15 Occupations for Manufacturing, 5-Year Forecast 10-County Upstate Region

Source: JobsEQ, 2025Q4

Occupation	Average Current Annual Wage	5-Year Forecast Demand
Team Assemblers	$51,100	8,962
Inspectors, Testers, Sorters, Samplers, and Weighers	$50,500	3,032
Laborers and Freight, Stock, and Material Movers, Hand	$41,600	2,713
First-Line Supervisors of Production and Operating Workers	$79,600	2,548
Industrial Machinery Mechanics	$65,500	1,527
Electrical, Electronic, and Electromechanical Equipment Assemblers, Except Coil Winders, Tapers, and Finishers	$46,400	1,316
Welders, Cutters, Solderers, and Brazers	$52,000	1,245
Packaging and Filling Machine Operators and Tenders	$42,200	1,196
Assemblers and Fabricators, All Other	$52,100	1,129
Maintenance and Repair Workers, General	$60,300	1,100
Machinists	$57,700	1,100
Industrial Engineers	$102,600	1,061
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	$87,300	1,020
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	$48,000	957
Shipping, Receiving, and Inventory Clerks	$46,100	951

Accommodation and Food Services





The Accommodation and Food Services sector continues to generate some of the highest hiring demand in the Upstate economy. Over the next five years, employers are projected to need nearly 59,000 workers in Food Services and Drinking Places and nearly 4,000 in Accommodation. Although projected demand is modestly lower than in last year's report, the change is consistent with broader labor market normalization while continuing to reflect substantial replacement and turnover needs.

Average annual wages increased in both major subsectors during the past year, rising to $33,649 in Accommodation and $23,666 in Food Services and Drinking Places. By comparison, the MIT Living Wage Calculator estimates that a single adult with no children in the Upstate requires approximately **$42,286 annually** (or **$20.33 per hour**) to meet basic living expenses. As a result, average earnings in both subsectors remain below the estimated living wage. Demand is concentrated in lower-wage occupations, with Fast Food and Counter Workers and Waiters and Waitresses accounting for more than half of all projected openings over the next five years.

The occupational outlook remains dominated by customer service and food preparation positions. Among the 15 highest-demand occupations, only First-Line Supervisors of Food Preparation and Serving Workers and Food Service Managers earn average wages above the regional living wage, while both rank among the lowest-demand occupations in the sector.

Top 15 Occupations for Accommodation and Food Services, 5-Year Forecast 10-County Upstate Region

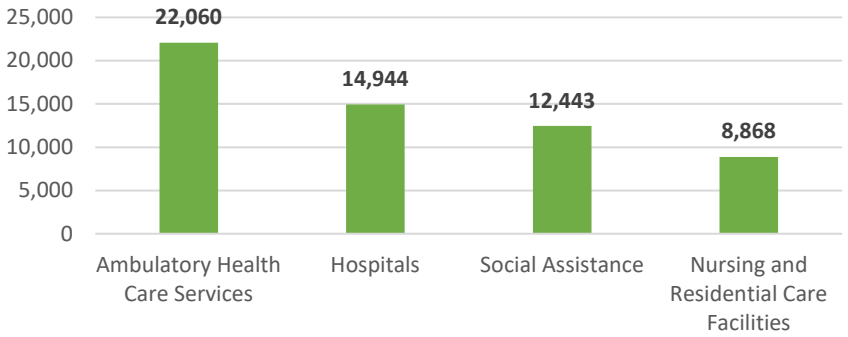
Source: JobsEQ, 2025Q4

Occupation	Average Current Annual Wage	5-Year Forecast Demand
Fast Food and Counter Workers	$28,200	21,644
Waiters and Waitresses	$25,400	10,721
Cooks, Restaurant	$35,900	5,943
First-Line Supervisors of Food Preparation and Serving Workers	$45,300	4,061
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	$27,300	2,760
Food Preparation Workers	$31,700	2,262
Bartenders	$27,400	2,250
Cooks, Fast Food	$28,900	2,128
Cashiers	$27,900	1,630
Dishwashers	$30,600	1,612
Dining Room and Cafeteria Attendants and Bartender Helpers	$26,900	1,491
Food Service Managers	$71,900	1,001
Maids and Housekeeping Cleaners	$33,000	977
Hotel, Motel, and Resort Desk Clerks	$30,800	702
Driver/Sales Workers	$29,300	601

Health Care and Social Assistance

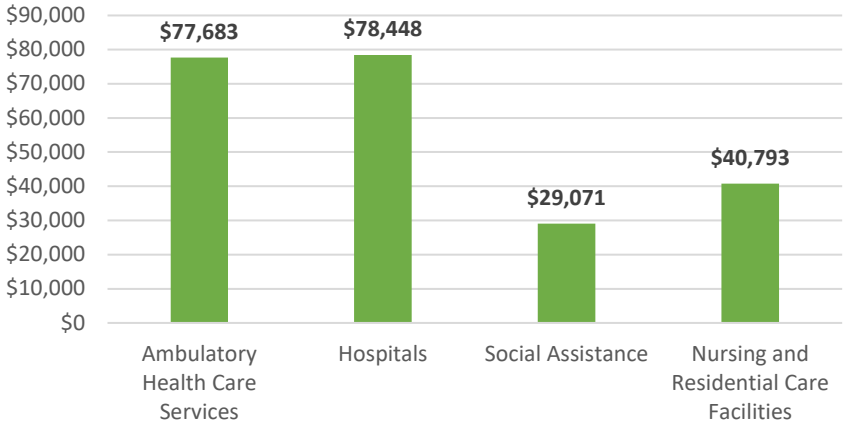
Top Health Care and Social Assistance Sectors, Ranked on 5-Year Forecast Talent Demand

Source: JobsEQ, 2025Q4



Current Average Annual Salary

Source: JobsEQ, 2025Q4



Health Care and Social Assistance employed approximately 101,801 workers in the 10-county Upstate region as of 2025Q4, making it one of the region's largest employment sectors. JobsEQ projects the greatest five-year talent demand—reflecting both employment growth and replacement needs—to occur in Ambulatory Health Care Services (22,060), followed by Hospitals (14,944), Social Assistance (12,443), and Nursing and Residential Care Facilities (8,868).

Average annual wages increased across all four major subsectors during the past year. Hospitals now offer the highest average annual wage ($78,448), slightly exceeding Ambulatory Health Care Services ($77,683). Nursing and Residential Care Facilities ($40,793) and Social Assistance ($29,071) also posted wage gains, although average earnings in both subsectors remain below the Upstate's estimated living wage for a single adult with no children ($42,286 annually)

.

Projected workforce demand remains concentrated in front-line care and support occupations. Personal Care Aides ($30,800) and Nursing Assistants ($37,500) account for more than 14,600 projected openings over the next five years, yet both earn less than the region's estimated living wage. In contrast, the sector's highest-paying occupations—including Medical and Health Services Managers ($125,800), Nurse Practitioners ($117,200), and Registered Nurses ($86,100)—offer substantially higher wages but comparatively fewer projected openings. These patterns underscore the sector's continuing dependence on front-line occupations to meet growing health care needs while highlighting the wage premium associated with advanced clinical and management roles.

Top 15 Occupations for Health Care & Social Assistance, 5-Year Forecast 10-County Upstate Region

Source: JobsEQ, 2025Q4

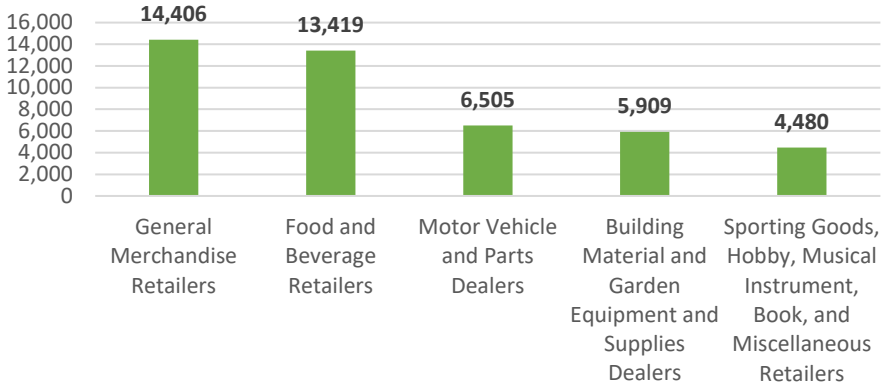
Occupation	Average Current Annual Wage	5-Year Forecast Demand
Personal Care Aides	$30,800	10,013
Nursing Assistants	$37,500	4,623
Registered Nurses	$86,100	4,124
Home Health Aides	$30,800	3,552
Medical Assistants	$42,500	2,627
Childcare Workers	$29,200	2,205
Medical Secretaries and Administrative Assistants	$41,900	1,717
Receptionists and Information Clerks	$37,800	1,305
Dental Assistants	$48,700	1,254
Licensed Practical and Licensed Vocational Nurses	$61,300	1,222
Medical and Health Services Managers	$125,800	1,174
Office Clerks, General	$39,700	982
Maids and Housekeeping Cleaners	$28,600	788
Nurse Practitioners	$117,200	735
Customer Service Representatives	$42,000	661

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Retail Trade

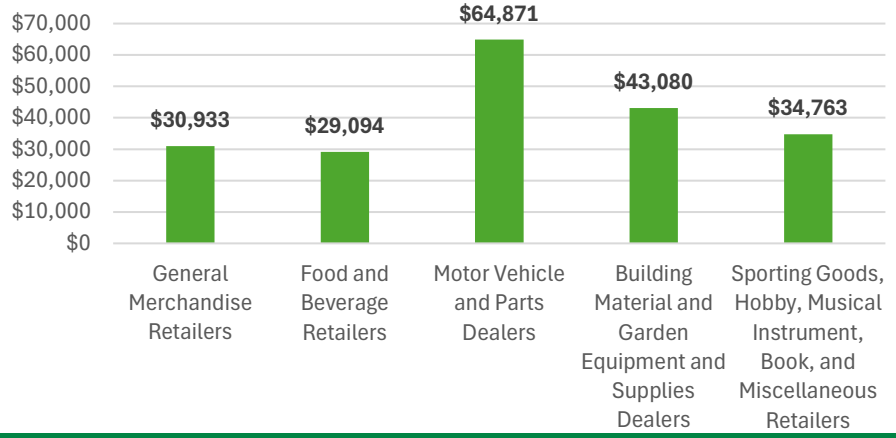
Top Retail Trade Sectors, Ranked on 5-Year Forecasted Talent Demand

Source: JobsEQ 2025Q4



Current Average Annual Salaries

Source: JobsEQ 2025Q4



Retail Trade remains one of the Upstate's largest sources of projected workforce demand. JobsEQ projects the greatest five-year talent demand—reflecting both employment growth and replacement needs—to occur in General Merchandise Retailers (14,406) and Food and Beverage Retailers (13,419), followed by Motor Vehicle and Parts Dealers (6,505), Building Material and Garden Equipment and Supplies Dealers (5,909), and Sporting Goods, Hobby, Musical Instrument, Book, and Miscellaneous Retailers (4,480).

Average annual wages increased across each of the major retail industries during the past year. Motor Vehicle and Parts Dealers continue to offer the highest average annual wage ($64,871), well above the other major retail subsectors, while General Merchandise Retailers ($30,933) and Food and Beverage Retailers ($29,094) remain among the sector's lowest-paying industries.

Projected workforce demand remains concentrated in front-line retail occupations. Cashiers ($28,600), Retail Salespersons ($34,500), and Stockers and Order Fillers ($37,000) account for more than 36,000 projected openings over the next five years, yet all earn less than the Upstate's estimated living wage for a single adult with no children ($42,286 annually). Among the 15 highest-demand occupations, only First-Line Supervisors of Retail Sales Workers, Automotive Service Technicians and Mechanics, Pharmacy Technicians, and General and Operations Managers meet or exceed the regional living wage. These patterns underscore the sector's continued reliance on lower-wage, customer-facing occupations to meet projected workforce demand.

Top 15 Occupations for Retail Trade, 5-Year Forecast

10-County Upstate Region

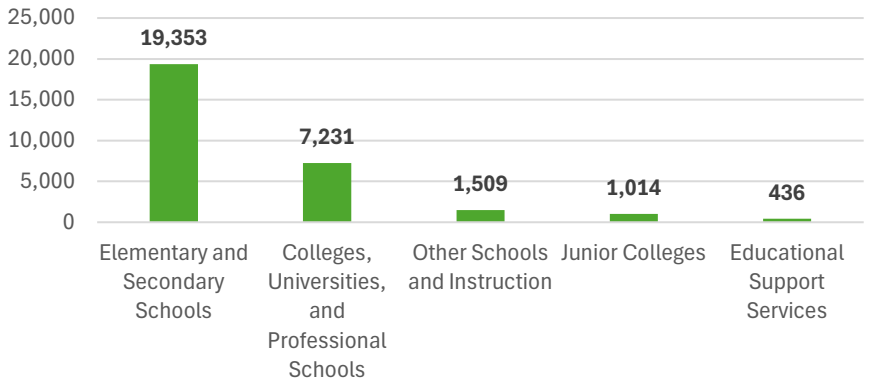
Source: JobsEQ, 2025Q4

Occupation	Average Current Annual Wage	5-Year Forecast Demand
Cashiers	$28,600	13,837
Retail Salespersons	$34,500	13,614
Stockers and Order Fillers	$37,000	9,002
First-Line Supervisors of Retail Sales Workers	$51,300	3,136
Customer Service Representatives	$41,400	1,796
Fast Food and Counter Workers	$28,100	1,315
Laborers and Freight, Stock, and Material Movers, Hand	$38,900	1,314
Automotive Service Technicians and Mechanics	$52,900	1,168
Food Preparation Workers	$31,100	1,083
Pharmacy Technicians	$43,000	854
General and Operations Managers	$100,400	702
Parts Salespersons	$34,800	675
Light Truck Drivers	$31,900	521
Office Clerks, General	$37,900	511
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	$31,700	454

Educational Services

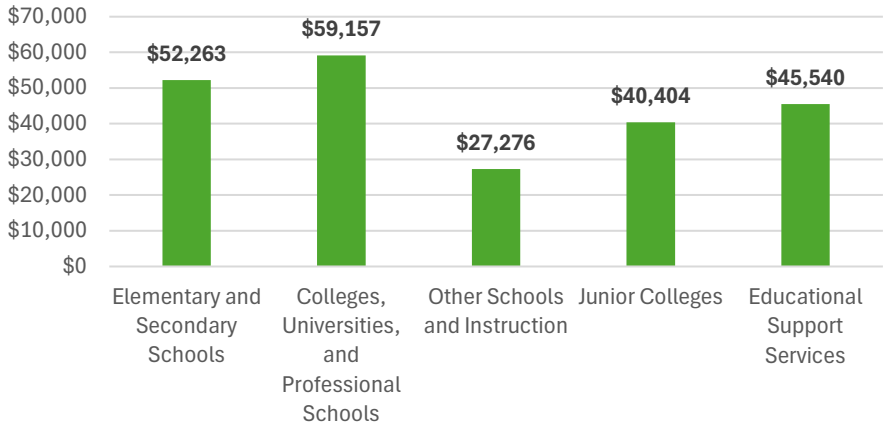
Top Educational Services Sectors Ranked on Forecasted Talent Demand

Source: JobsEQ 2025Q4



Current Average Annual Salaries

Source: JobsEQ 2025Q4



Educational Services ranked fifth among the Upstate's industry sectors by projected five-year talent demand this year, rising from sixth in the previous report. JobsEQ projects the greatest five-year talent demand—reflecting both employment growth and replacement needs—to occur in **Elementary and Secondary Schools (19,353)**, followed by **Colleges, Universities, and Professional Schools (7,231)**. Together, these subsectors continue to represent a significant source of projected workforce demand across the region.

Colleges, Universities, and Professional Schools continue to offer the highest average annual earnings among the major educational subsectors ($59,157), followed by Elementary and Secondary Schools ($52,263). Both exceed the Upstate's estimated living wage for a single adult with no children ($42,286 annually), while support-oriented subsectors such as Other Schools and Instruction ($27,276) remain well below that benchmark.

Projected workforce demand remains anchored in classroom instruction and instructional support. Teaching Assistants ($30,400) narrowly surpass Elementary School Teachers as the highest-demand occupation, yet earn less than the regional living wage. In contrast, professional teaching positions and Education Administrators ($105,700) offer substantially higher wages, illustrating the considerable wage differences between instructional support occupations and credentialed teaching and administrative roles.

Top 15 Occupations for Educational Services, 5-Year Forecast, 10-County Upstate Region

Source: JobsEQ, 2025Q4

Occupation	Average Current Annual Wage	5-Year Forecast Demand
Teaching Assistants, Except Postsecondary	$30,400	2,563
Elementary School Teachers, Except Special Education	$61,900	2,520
Secondary School Teachers, Except Special and Career/Technical Education	$64,600	1,758
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	$32,600	1,280
Substitute Teachers, Short-Term	$45,000	1,255
Middle School Teachers, Except Special and Career/Technical Education	$64,900	1,034
Bus Drivers, School	$44,000	917
Educational, Guidance, and Career Counselors and Advisors	$61,600	890
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	$44,900	888
Office Clerks, General	$40,600	864
Childcare Workers	$28,900	754
Self-Enrichment Teachers	$45,000	597
Education Administrators, Kindergarten through Secondary	$105,700	540
Fast Food and Counter Workers	$28,200	524
Cooks, Institution and Cafeteria	$33,200	518

NOTE: The 2025–2026 South Carolina Educator Supply and Demand Report published by CERRA indicates that statewide teacher vacancies declined for a second consecutive year, falling to **706** unfilled positions at the beginning of the 2025–2026 school year, down from **1,043** the previous year and **1,613** two years earlier. Although these trends suggest improving labor market conditions, projected demand for educational workers in the Upstate remains substantial. *Source: 2025-2026 South Carolina Annual Educator Supply and Demand Report*

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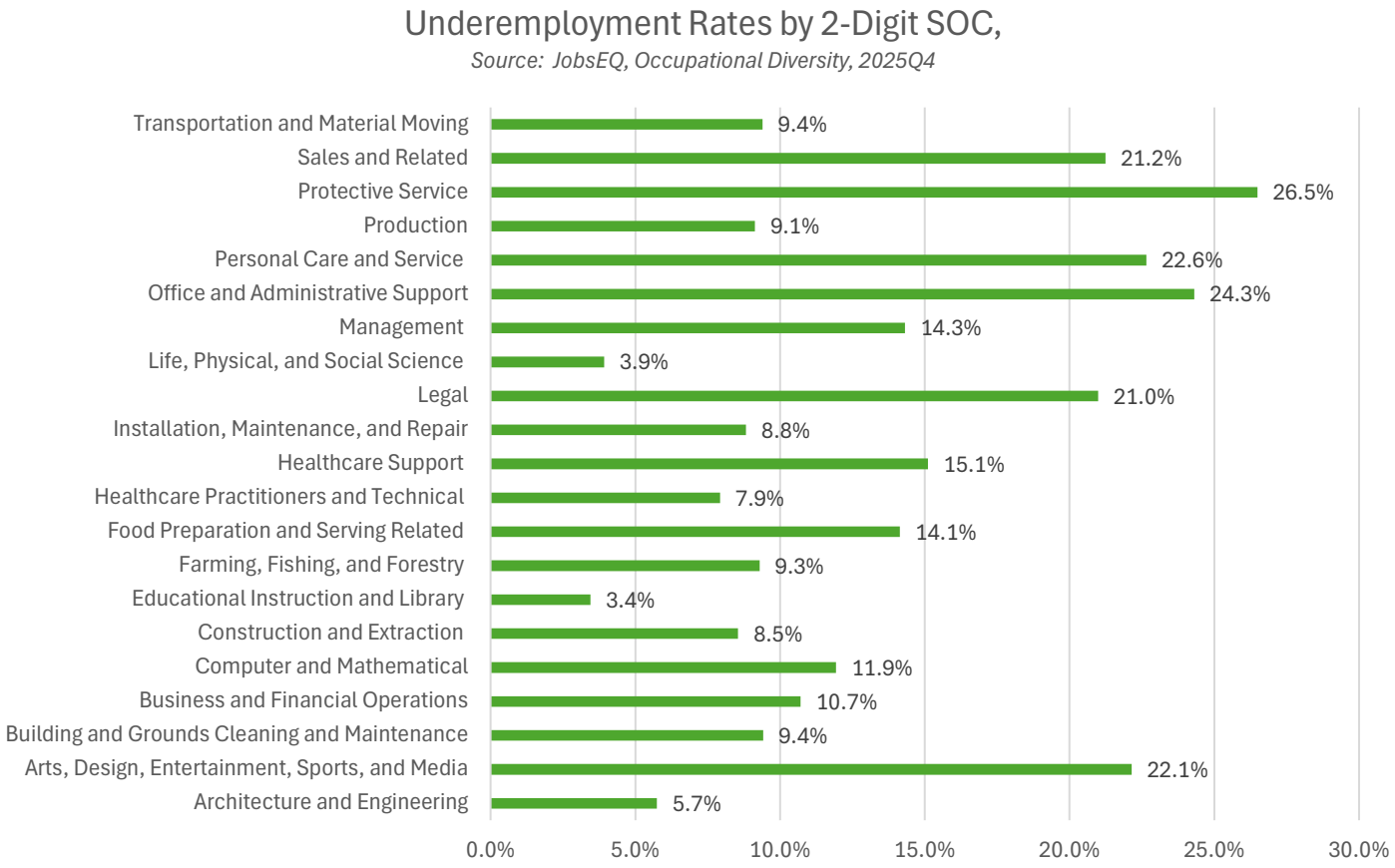
Top 10 Occupations in Upstate Job Postings by Educational Attainment

Associate Online Job Postings, June 2025 – June 2026 *Source: Chmura JobsEQ, RTI*	
Occupation	Active Job Ads
Registered Nurses	1,131
Medical and Health Services Managers	327
Maintenance and Repair Workers, General	322
Computer User Support Specialists	204
First-Line Supervisors of Retail Sales Workers	148
Mechanical Drafters	138
Bookkeeping, Accounting, and Auditing Clerks	123
Physical Therapist Assistants	120
Business Operations Specialists, All Other	118
Industrial Engineers	105

Bachelor Online Job Postings, June 2025 – June 2026 *Source: Chmura JobsEQ, RTI*	
Occupation	Active Job Ads
Architectural and Engineering Managers	1,127
Medical and Health Services Managers	947
Computer and Information Systems Managers	884
Industrial Engineers	837
Management Analysts	764
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	741
Business Operations Specialists, All Other	695
Human Resources Specialists	692
Accountants and Auditors	667
Securities, Commodities, and Financial Services Sales Agents	571

Postgraduate Online Job Postings, June 2025 – June 2026 *Source: Chmura JobsEQ, RTI*	
Occupation	Active Job Ads
Speech-Language Pathologists	412
Mental Health Counselors	289
Nurse Practitioners	209
Medical and Health Services Managers	199
Mental Health and Substance Abuse Social Workers	188
Lawyers	188
Business Teachers, Postsecondary	140
Health Specialties Teachers, Postsecondary	139
Education Administrators, Postsecondary	112
Medical Scientists, Except Epidemiologists	112

Underemployment Rates



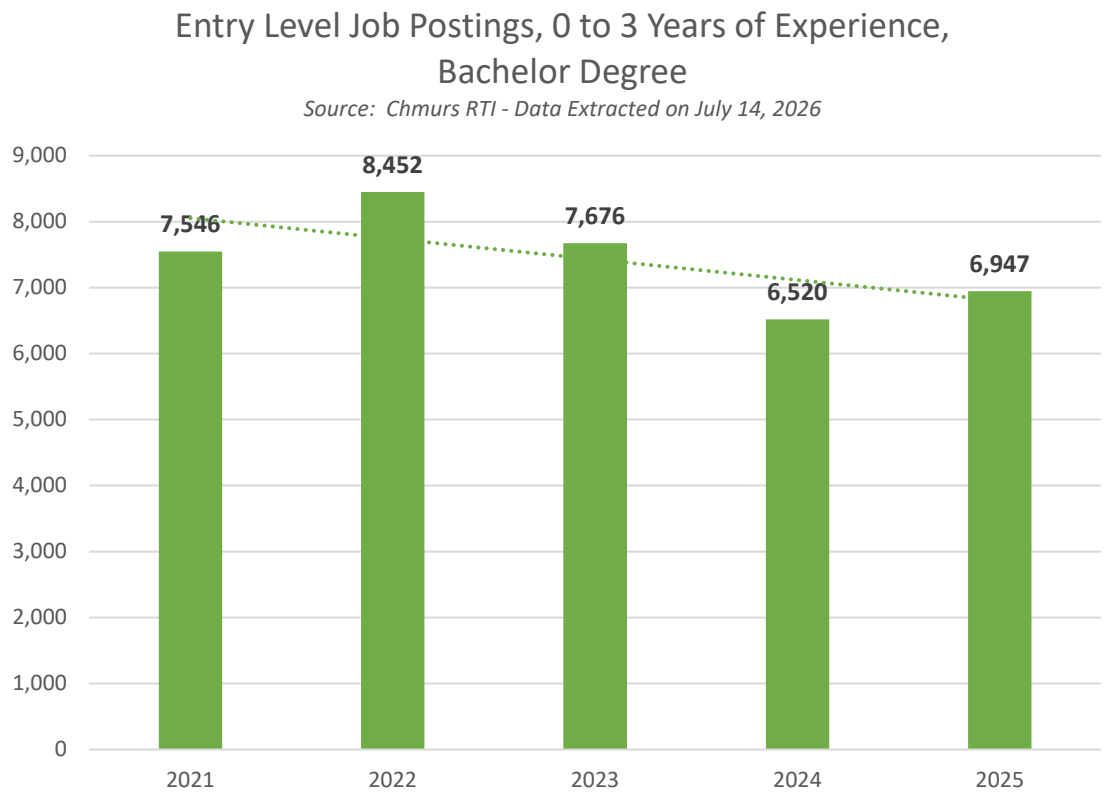
The chart to the left presents estimated underemployment rates by 2-digit Standard Occupational Classification (SOC) group for the Greenville–Spartanburg–Anderson CSA. The measure follows the New York Federal Reserve's methodology, which defines underemployment as college graduates working in occupations that typically do not require a bachelor's degree. Under this approach, an occupation is classified as a "college job" when at least 50 percent of workers report that a bachelor's degree or higher is typically required.

Across all occupations, the estimated underemployment rate in the Greenville–Spartanburg–Anderson CSA is 13.4 percent. Underemployment varies considerably across occupational groups, with rates exceeding 10 percent in more than half of the 2-digit SOC categories. The highest estimated rates occur in Protective Service (26.5%), Office and Administrative Support (24.3%), Personal Care and Service (22.6%), Arts, Design, Entertainment, Sports, and Media (22.1%), Sales and Related (21.2%), and Legal (21.0%). In contrast, Educational Instruction and Library (3.4%), Life, Physical, and Social Science (3.9%), and Architecture and Engineering (5.7%) report the lowest estimated levels of underemployment.

Several occupational groups with elevated underemployment rates—including Personal Care and Service, Sales and Related, and Office and Administrative Support—also appear elsewhere in this report as sectors characterized by strong workforce demand and comparatively low wages. Together, these findings suggest that some of the region's highest-demand occupations may not fully utilize the educational attainment of many workers employed in them.

Underemployment, as defined by the New York Federal Reserve, does not necessarily indicate that an individual is in an inappropriate occupation or has made a poor career choice. Rather, the measure reflects the typical educational requirements of an occupation and provides a useful indicator for identifying areas where educational attainment and labor market demand may be less closely aligned.

Entry-Level Job Postings – Greenville-Spartanburg-Anderson, SC CSA



Entry-level job postings requiring a bachelor's degree (0–3 years of experience) reached a recent peak of 8,452 in 2022 before declining over the following two years. Postings increased modestly to 6,947 in 2025 after reaching a recent low of 6,520 in 2024 but remained approximately 18% below the 2022 peak. Overall, the data suggest that demand for entry-level bachelor's degree talent has stabilized but has not returned to the levels observed earlier in the decade.

Through the first six months of 2026, employers in the Greenville–Spartanburg–Anderson region posted 4,178 entry-level positions requiring a bachelor's degree. While it is too early to assess the full-year trend, employer demand for recent graduates remains substantial. These local findings are generally consistent with national labor market conditions. According to the Federal Reserve Bank of New York, the unemployment rate for recent college graduates was 5.7% in the first quarter of 2026, while the underemployment rate remained elevated at 41.5%. Together, the local and national data suggest that opportunities for recent graduates remain significant, but competition for entry-level professional positions continues to be greater than in the immediate post-pandemic labor market.

Detailed Analysis of Select Occupations with Underemployment Above 10 Percent – Slide 1

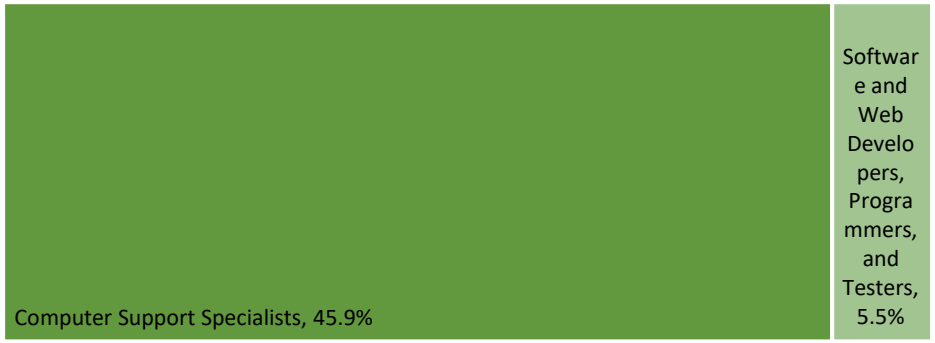
Underemployment for Arts, Design, Entertainment, Sports, and Media Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



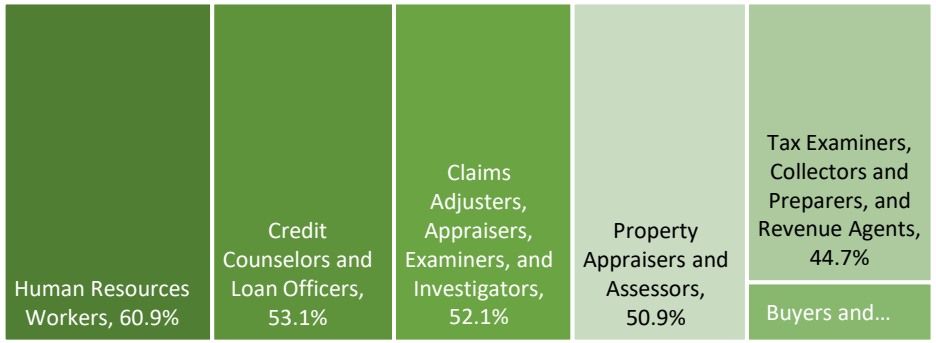
Underemployment Rate for Computer and Mathematical Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



Underemployment Rate for Business and Financial Operation Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



Underemployment Rate for Food Preparation and Serving Related Occupations

Source: JobsEQ Occupation Diversity, 2025Q4

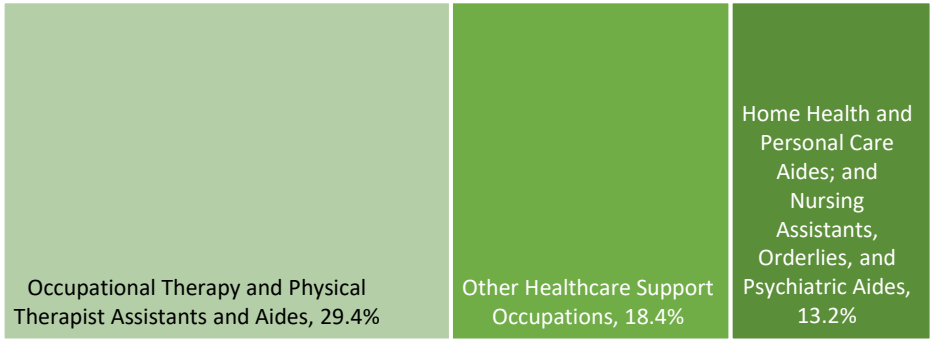


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Detailed Analysis of Select Occupations with Underemployment Above 10 Percent – Slide 2

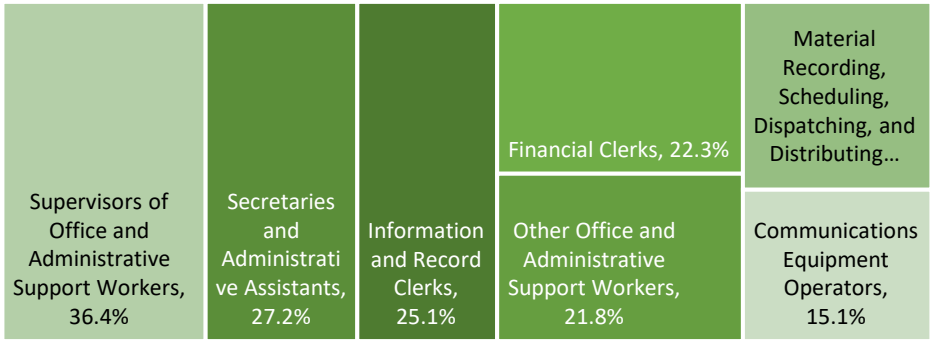
Underemployment Rate for Healthcare Support Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



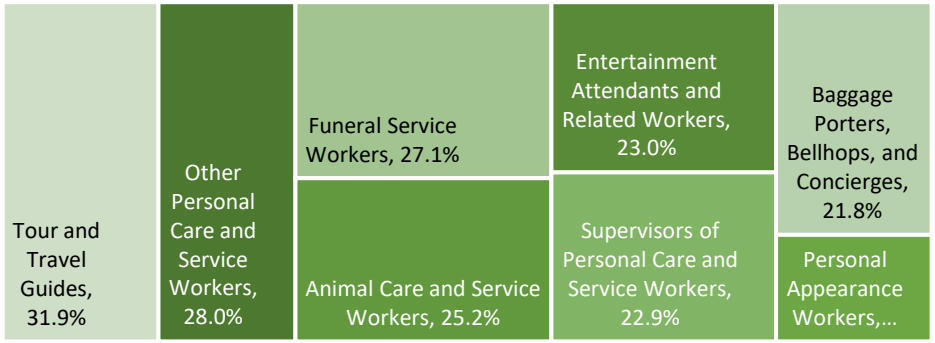
Underemployment Rates for Office and Administrative Support Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



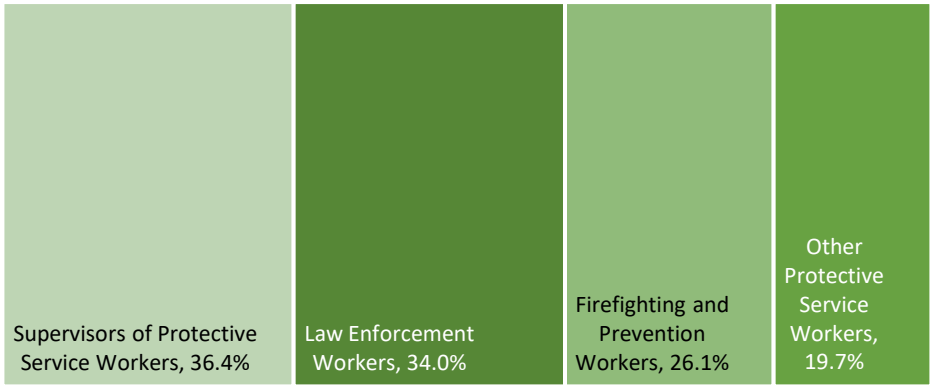
Underemployment Rates for Personal Care and Service Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



Underemployment for Protective Service Occupations

Source: JobsEQ Occupation Diversity, 2025Q4



Two additional occupational groups exceeded the 10 percent underemployment threshold but are not presented as treemaps because they contain relatively few detailed occupations or are dominated by a small number of occupations.

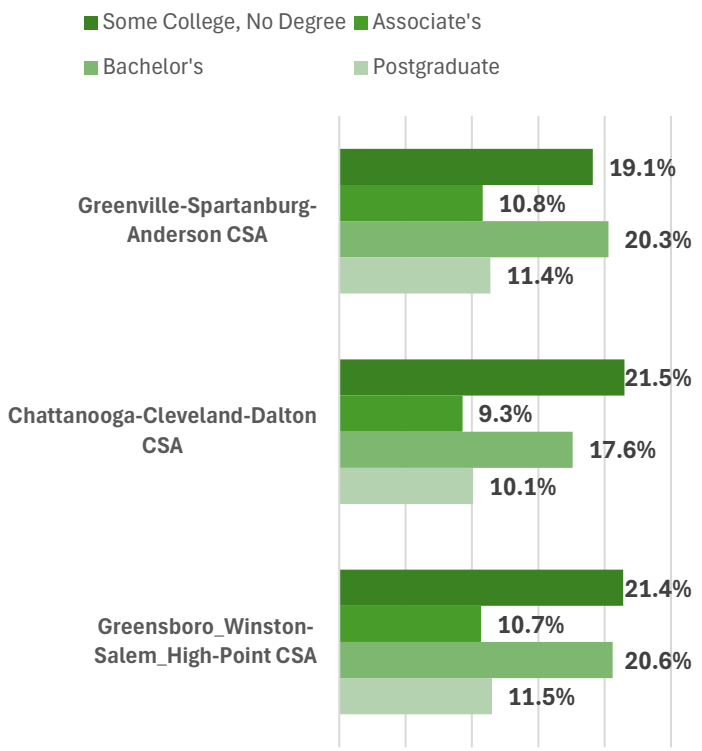
Legal Occupations were driven primarily by **Legal Support Workers**, which recorded an estimated underemployment rate of **48.3 percent**.

Within **Sales and Related Occupations**, underemployment varied considerably across occupation classifications. The highest rates occurred among **Sales Representatives, Services (40.5%)**, **Other Sales and Related Workers (37.9%)**, **Supervisors of Sales Workers (29.8%)**, and **Retail Sales Workers (18.0%)**.

Regional Comparison, part 1

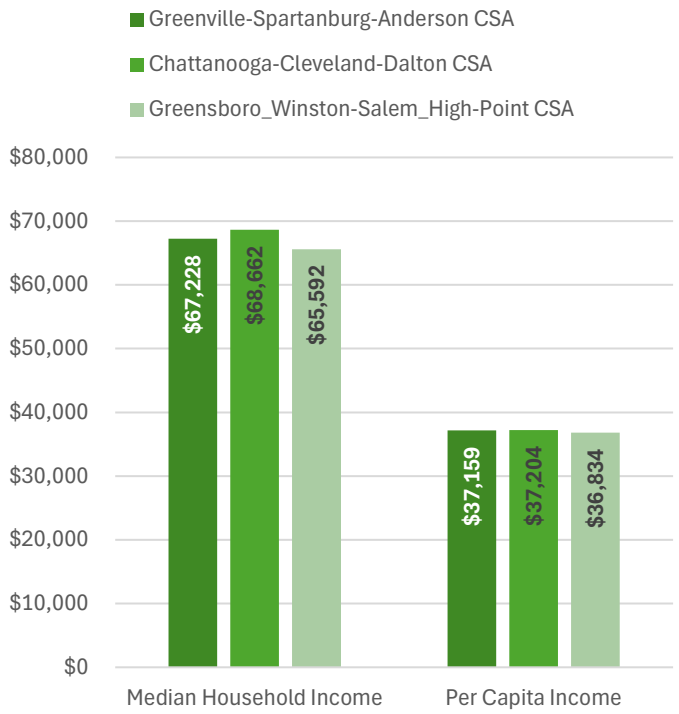
Multi-Region Educational Attainment

Source: Chmura JobsEQ, Economic Overview, Data Extracted July 1, 2026



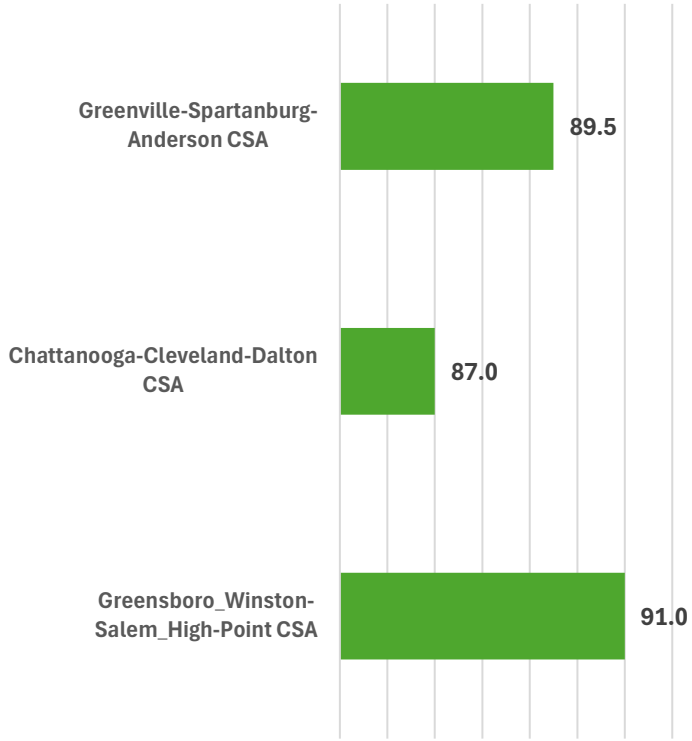
Median Household Income & Per Capita Income

Source: Chmura JobseEQ, Economic Overview, Data Extracted July 1, 2026



Cost of Living Index

Source: Chmura JobsEQ, Economic Overview, Data Extracted July 1, 2026

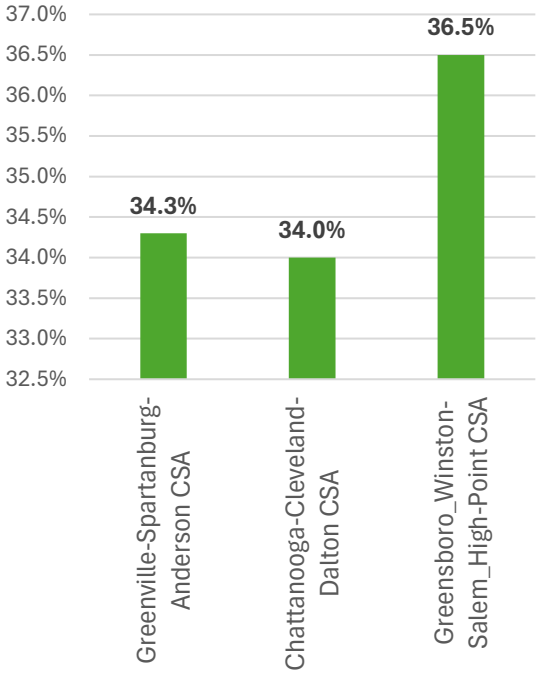


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Regional Comparison, part 2

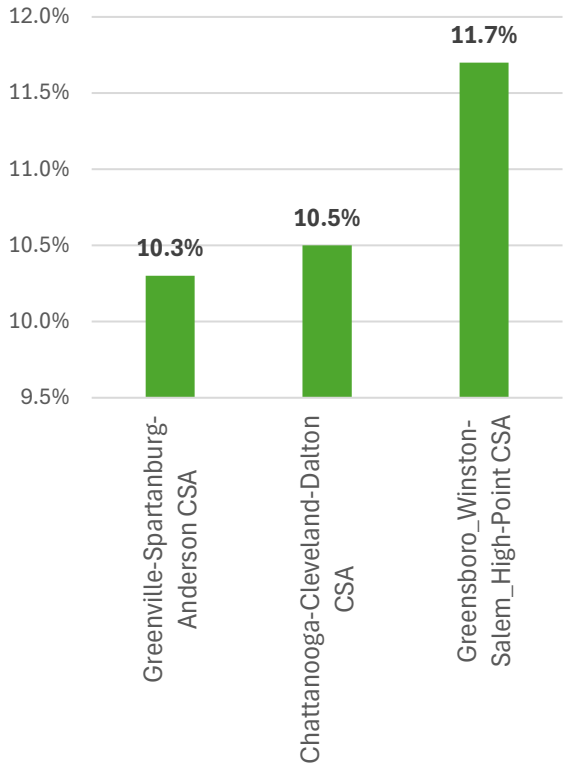
Children in Single Parent Families (% of all children)

Source: Chmura JobsEQ, Economic Overview, Data Extracted July 1, 2026



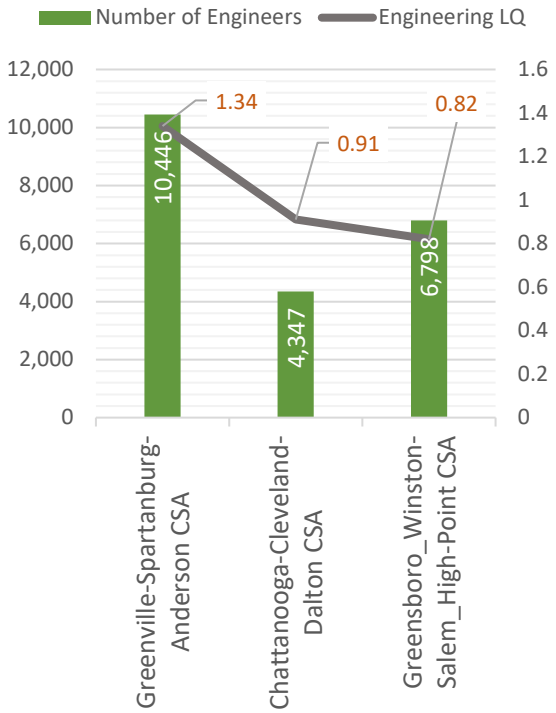
Work from Home

Source: Chmura JobsEQ, Economic Overview, Data Extracted July 1, 2026



Number of Engineers and Engineering LQ by Region

Source: Chmura JobsEQ, Data Extracted July 1, 2026



There is relatively little variation in the percentage of children living in single-parent households across the three comparison regions. In the Greenville–Spartanburg–Anderson CSA, 34.3% of children live in single-parent households, nearly identical to the Chattanooga–Cleveland–Dalton CSA (34.0%) but below the Greensboro–Winston-Salem–High Point CSA (36.5%). Because single-parent households often face additional economic and workforce participation challenges, this measure provides useful context when comparing regional labor market conditions and the long-term sustainability of the workforce pipeline.

Remote work remains an important feature of the post-pandemic labor market, although its prevalence is similar across the three regions. The Greensboro CSA reports the highest share of remote workers at 11.7%, followed by the Chattanooga–Cleveland–Dalton CSA (10.5%) and the Greenville–Spartanburg–Anderson CSA (10.3%). These relatively modest differences likely reflect the similar industrial composition of the three regions, where manufacturing continues to account for a significant share of employment.

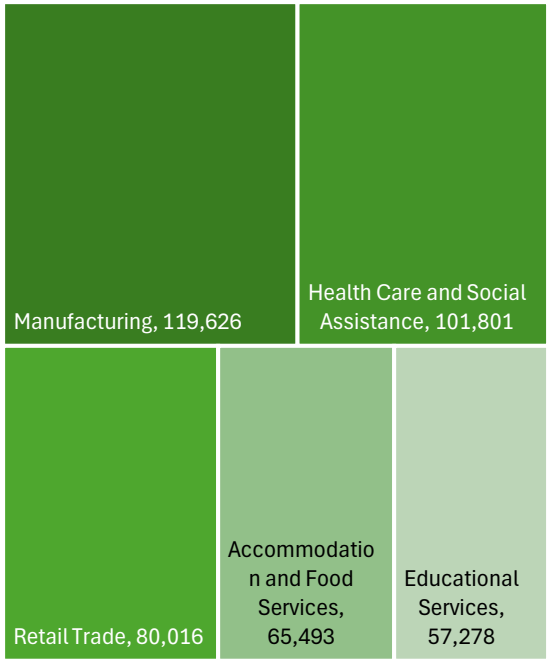
The final chart compares the number of engineers with each region's Engineering Location Quotient (LQ), a measure of the concentration of engineering employment relative to the national average. The Greenville–Spartanburg–Anderson CSA is the only region with an Engineering LQ greater than 1.0 (1.34), indicating a substantially higher concentration of engineering employment than the nation as a whole. This specialization is further reflected in the ratio of engineers to total employment—approximately one engineer for every 70 workers in the Greenville–Spartanburg–Anderson CSA, compared with one for every 103 workers in Chattanooga and one for every 115 workers in Greensboro.

Regional Comparison, part 3

Source: Chmura JobsEQ, Economic Overview

Greenville-Spartanburg-Anderson CSA, Top 5 Industry Sectors by Total Employment

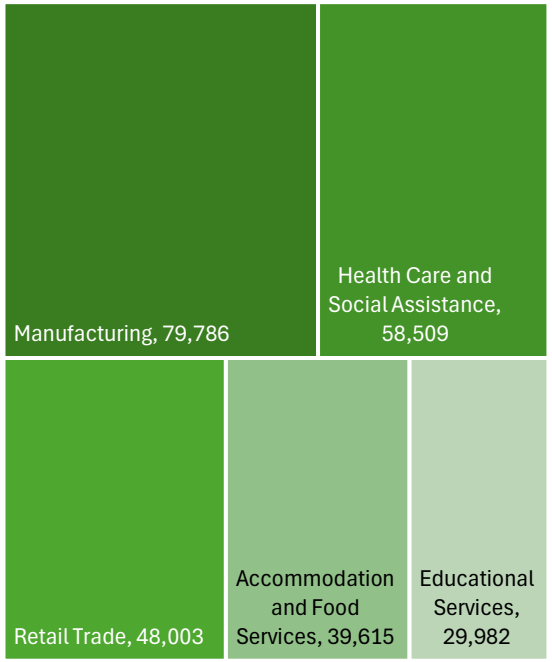
Source: Chmura JobsEQ, 2025Q4



Population Estimate (2025): 1,659,022
Labor Force (16 years & older: 767,473
Labor Force Participation (16 years & older): 60.9%

Chattanogga-Cleveland-Dalton CSA, Top 5 Industry Sectors by Total Employment

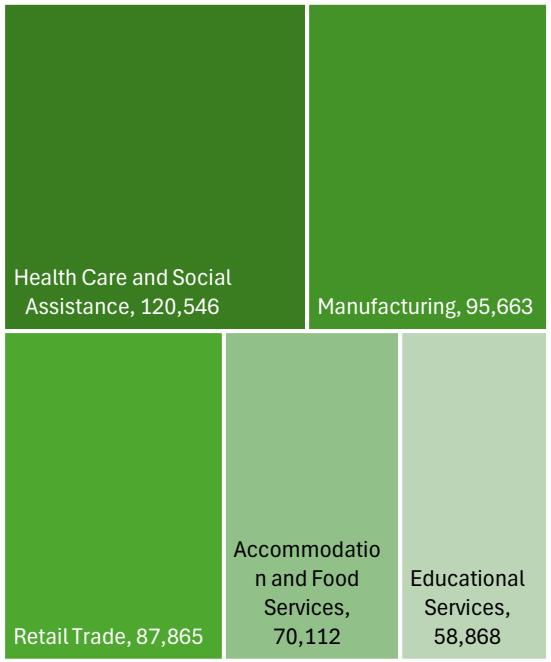
Source: Chmura JobsEQ, 2025Q4



Population Estimate (2025): 1,027,577
Labor Force (16 years & older: 487,690
Labor Force Participation (16 years & older): 60.6%

Greensboro-Winston-Salem-High-Point CSA, Top 5 Indusry Sectors by Total Employment

Source: Chmura JobsEQ, 2025Q4



Population Estimate: (2025): 1,776,615
Labor Force (16 years & older: 856,896
Labor Force Participation (16 years & older): 61.6%

The three peer regions share remarkably similar employment structures, differing primarily in their two largest industry sectors. Across all three CSAs, Retail Trade, Accommodation and Food Services, and Educational Services rank third, fourth, and fifth in total employment. The distinguishing feature lies at the top: whether Manufacturing or Health Care and Social Assistance anchors the regional economy.

In both the Greenville–Spartanburg–Anderson and Chattanooga–Cleveland–Dalton CSAs, Manufacturing is the largest employment sector, reflecting the advanced manufacturing identity of the I-85 and I-75 corridors. The Greensboro–Winston-Salem–High Point CSA is the only region where Health Care and Social Assistance ranks first, exceeding its manufacturing employment.

The Greenville–Spartanburg–Anderson CSA occupies a distinctive middle ground. It has the largest manufacturing workforce among the three regions, with 119,626 jobs, while also supporting a robust Health Care and Social Assistance sector employing more than 101,800 workers. This combination of a large manufacturing base and a strong health care sector provides the Upstate with a potentially more balanced employment structure than either comparison region, potentially enhancing long-term economic resilience.

Labor force participation rates are remarkably similar across the three regions, ranging from 60.6% in Chattanooga to 61.6% in Greensboro. Greensboro remains the largest region by both population and labor force, followed by the Upstate and Chattanooga.

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Partnering Through Data, Research, and Analytics

The Center for Business Analytics and Community Research

Johnson College of Business and Economics, USC Upstate

We partner with businesses, nonprofits, government agencies, and community organizations to transform data into informed decisions and meaningful action. What makes the Center unique is the integration of faculty expertise, student learning, and applied research to address real-world challenges. Every partnership creates value for our clients, our students and the communities we serve, advancing our shared commitment to a stronger Upstate.

Business Analytics Solutions:

- Strategic Planning & Decision Support
- Business Intelligence & Dashboard Development
- Data Collection, Preparation & Management
- Descriptive, Predictive & Prescriptive Analytics
- Data Visualization & Storytelling
- Workforce Analytics & Talent Intelligence
- AI Readiness & Digital Transformation
- Executive Education & Customized Training

Applied Projects & Community Research:

- Workforce and Labor Market
- Analysis Economic Impact Studies
- Community Indicators & Benchmarking
- Nonprofit & Public Sector Analytics
- Survey Design, Focus Groups & Program Evaluation
- Policy Research & White Papers

The Center is built on the principle of reciprocity—working alongside community partners to create solutions that benefit organizations, students, and the Upstate region. We believe the best outcomes emerge when knowledge, experience, and data are shared through meaningful collaboration.

Contact: Sam Cooper, Ph.D.
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Website: CBACR

The Center sits at the intersection of academic expertise, applied analytics, and community impact.

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