



NATIVE HAWAIIANS IN HAWAII'S TOURISM SECTOR – 2021 UPDATE

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Research and Economic Analysis Division

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Executive Summary

Between 2015 and 2019, an average of 48,682 Native Hawaiians worked in the tourism intensive industries per year, accounted for 19.8 percent of the total workers in these industries, and 36.5 percent of the Native Hawaiian workers in all the industries. Compared with all the employees in the tourism intensive industries, Native Hawaiian workers were generally younger, more single, more with a high school diploma (but less with bachelor's degree or higher), and the average wage was lower than the state level for these industries. In the tourism intensive industries, more Native Hawaiians were wage and salary employees at 95.7 percent of workers, compared to 91.0 percent for all workers.

The top five occupations for Native Hawaiian workers in the tourism sector were sales, transportation and material moving, food preparation and serving, office administration, and management. However, in terms of Native Hawaiians' share in the occupation category, legal occupations had the largest share of Native Hawaiians at 57.3 percent; followed by protective services at 29.8 percent; transportation and material moving at 29.40percent; farming, fishing, and forestry at 27.4 percent; and life, physical, and social sciences at 25.9 percent.

Native Hawaiians in Hawaii’s Tourism Sector

This report is an overview of Native Hawaiians who were employed in Hawaii’s tourism sector¹. Here the focus is on five tourism intensive industries: accommodation and food services; arts, entertainment, and recreation; real estate and rental and leasing; retail trade; and transportation and warehousing. The data source is the U.S. Census Bureau, 2015-2019 American Community Survey (ACS) 5-year Public Use Microdata Sample (PUMS). For the purposes of this report, Native Hawaiians are defined using the “RACNH” variable in the PUMS.

Demographic Characteristics

From 2015 to 2019, 48,682 Native Hawaiians were employed in Hawaii’s tourism sector, accounting for just under 20 percent of the 242,392 employees in the tourism sector at the state level. The male-to-female ratio among Native Hawaiian employees was the same as all workers in the tourism sector at the state level.

On average, Native Hawaiian employees were younger than all employees in the tourism sector; over half (59.1 percent) of Native Hawaiians in the tourism industry were under the age of 40, compared with 48.3 percent of all employees in tourism.

Figure 1. Native Hawaiians in the tourism sector by gender

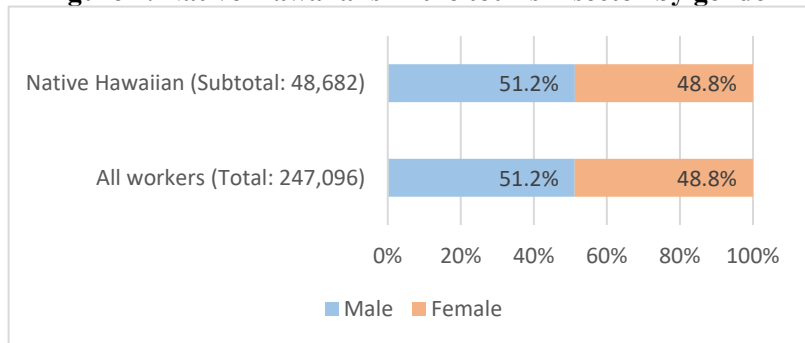
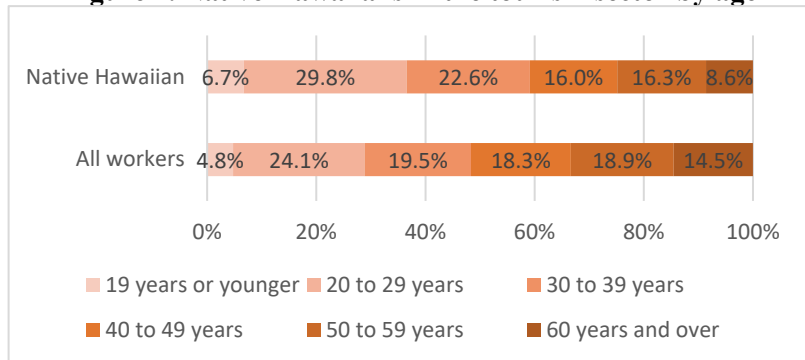


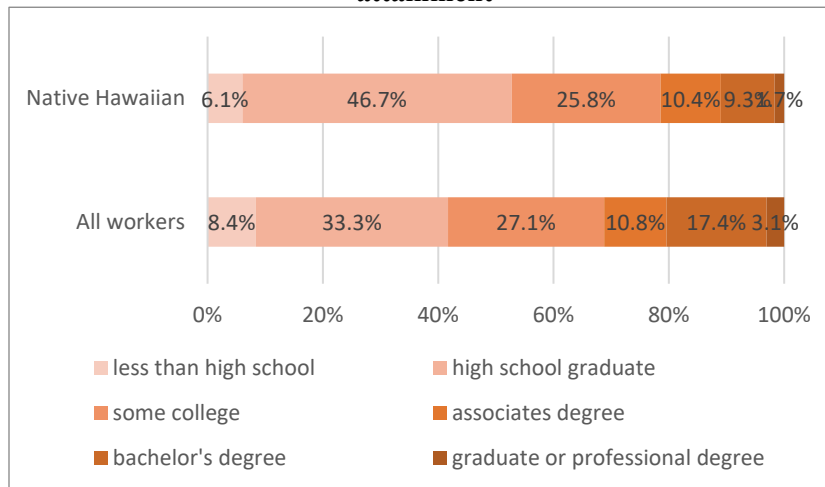
Figure 2. Native Hawaiians in the tourism sector by age



¹ According to the North American Industry Classification System (NAICS), tourism is not classified as an industry. Most tourism studies define tourism as a sector which consists of partial of industries such as accommodation, food services, retail trade, transportation, and so on. This report looks at the five tourism industries. According to DBEDT 2017 Input-Output model, these five industries accounted for about 90.5 percent of all visitor expenditures.

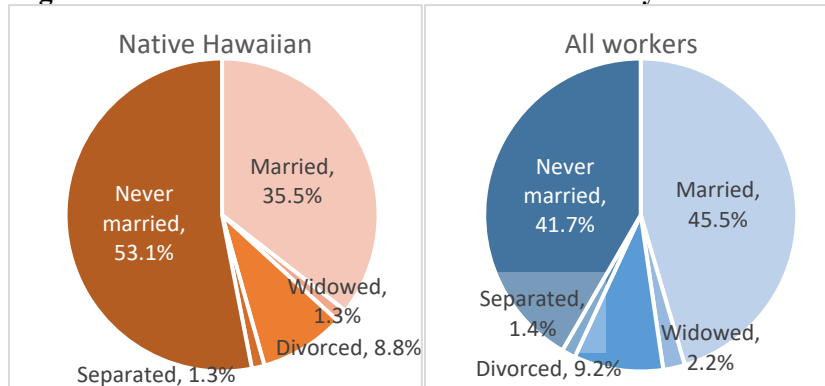
Just under half of Native Hawaiian employees were high school graduates, compared with one third of all employees in tourism. Shares of employees with some college education were roughly the same between Native Hawaiian and all workers. However, less than 10 percent of Native Hawaiian employees had a bachelor's degree or above, compared to 20 percent among all tourism industry workers in Hawaii.

Figure 3. Native Hawaiians in the tourism sector by educational attainment



More than half of Native Hawaiian employees were never married, over 10 percentage points higher than all workers. This is probably related to the fact that Native Hawaiian employees were younger on average in Hawaii's tourism sector.

Figure 4. Native Hawaiians in the tourism sector by marital status



Employment and Wage by Industry

In Hawaii's tourism sector, the accommodation and food services industry had the largest group of Native Hawaiian workers, 16,492 in total, followed by the retail industry, where 15,316 Native Hawaiians were employed. In both the arts, entertainment, and recreation industry and the real estate and rental and leasing industry, there were less than 4,000 Native Hawaiians.

Across all five industries, most Native Hawaiians were employed in Honolulu County, followed by Maui, Kalawao and Kauai County², except in the retail trade industry where Hawaii County had more Native Hawaiians than Maui, Kalawao and Kauai County.

² In the U.S. Census American Community Survey data, Maui, Kalawao and Kauai Counties are combined. U.S. Census Bureau recognize Kalawao as a County according to the Kalaupapa settlement in the 1880's.

Figure 5. Employment of Native Hawaiians in the tourism sector by industry and county

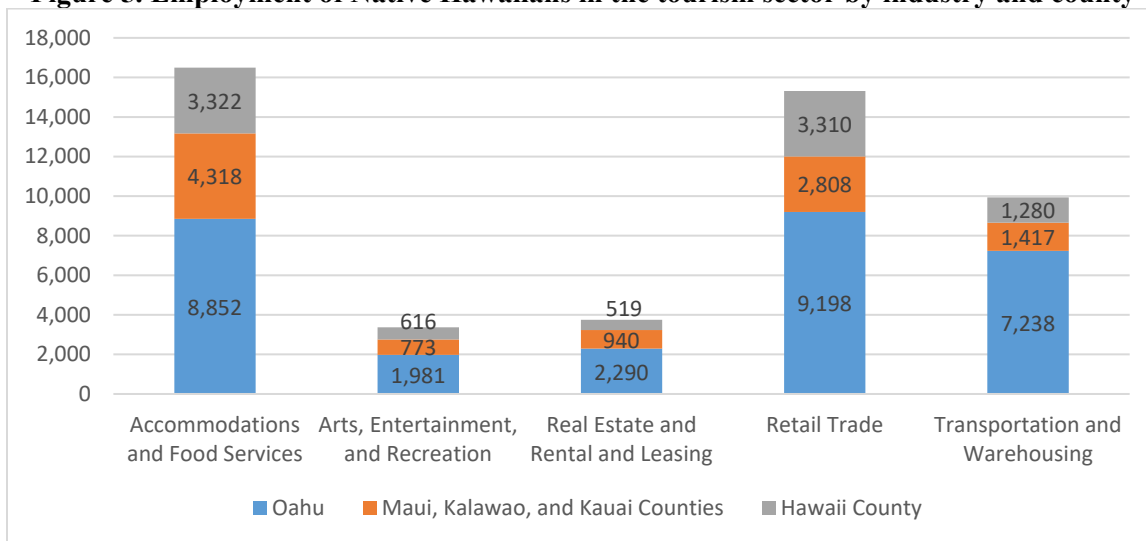


Table 1. Employment of Native Hawaiians in the tourism sector by industry and county

	Native Hawaiian				All workers			
	Oahu	Maui, Kalawao, and Kauai County	Hawaii County	Total	Oahu	Maui, Kalawao, and Kauai County	Hawaii County	Total
Accommodation and Food Services	8,852	4,318	3,322	16,492	60,240	24,847	12,173	97,260
Arts, Entertainment, and Recreation	1,981	773	616	3,370	9,373	4,124	3,011	16,508
Real Estate and Rental and Leasing	2,290	940	519	3,749	13,502	5,748	3,564	22,814
Retail Trade	9,198	2,808	3,310	15,316	51,880	12,737	10,803	75,420
Transportation and Warehousing	7,238	1,417	1,280	9,935	26,276	5,407	3,411	35,094
Tourism subtotal	29,559	10,256	9,047	48,862	161,271	52,863	32,962	247,096
Total	86,119	24,262	23,359	133,740	470,148	120,710	87,584	678,442

In Hawaii’s tourism sector, 95.7 percent of Native Hawaiians were wage and salary workers, compared with 91.0 percent of all employees in tourism and 93.3 percent of Native Hawaiians in all industries. For each tourism intensive industry, the share of wage and salary workers among Native Hawaiians was higher than the state level. The accommodation and food service industry saw the greatest share of wage and salary workers, with 99 percent among Native Hawaiians and 96.4 percent among all workers. Native Hawaiian’s shares of wage and salary employees were the least in the real estate and rental and leasing industry and the arts, entertainment, and recreation

industry, at 85.2 percent and 87.2 percent respectively. These two industries had the largest share of self-employed workers among Native Hawaiians, as well as among all workers. Only a few Native Hawaiians were unpaid workers, accounting for less than 0.3 percent of all Native Hawaiians workers in tourism.

Figure 6. Employment status of Native Hawaiians in the tourism sector by industry

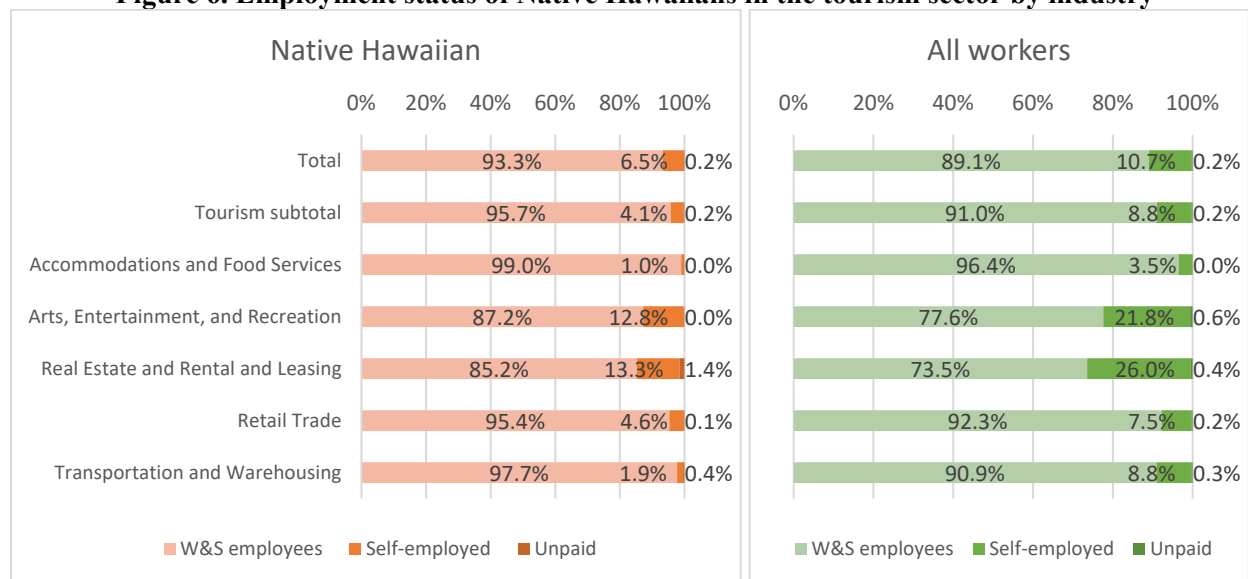


Table 2. Employment status of Native Hawaiians in the tourism sector by industry

	Native Hawaiian				All workers			
	W&S employees	Self-employed	Unpaid	Total	W&S employees	Self-employed	Unpaid	Total
Accommodation and Food Services	16,327	165	0	16,492	93,807	3,427	26	97,260
Arts, Entertainment, and Recreation	2,940	430	0	3,370	12,810	3,596	102	16,508
Real Estate and Rental and Leasing	3,195	500	54	3,749	16,779	5,934	101	22,814
Retail Trade	14,604	698	14	15,316	69,608	5,631	181	75,420
Transportation and Warehousing	9,708	187	40	9,935	31,907	3,087	100	35,094
Tourism subtotal	46,774	1,980	108	48,862	224,911	21,675	510	247,096
Total	124,815	8,716	209	133,740	604,175	72,840	1,427	678,442

While Native Hawaiians were more likely to be full-time workers among all industries relative to all workers, they were more likely to be part-time workers in the tourism sector.³ This was driven entirely Native Hawaiian workers in the accommodations and food services industry. Workers in the accommodations and food services industry worked full-time over 6 percentage points less than all workers. In almost all other tourism sector industries, Native Hawaiians were more likely to work full-time. In retail trade, Native Hawaiians were slightly less likely to work

³ For the purposes of this report, full-time work is defined as usually working 35 or more hours per week.

full-time, by around 1 percentage point. Overall, tourism sector workers were less likely to work full-time compared to workers in all industries.

Figure 7. Full-time/part-time status of Native Hawaiians in the tourism sector by industry

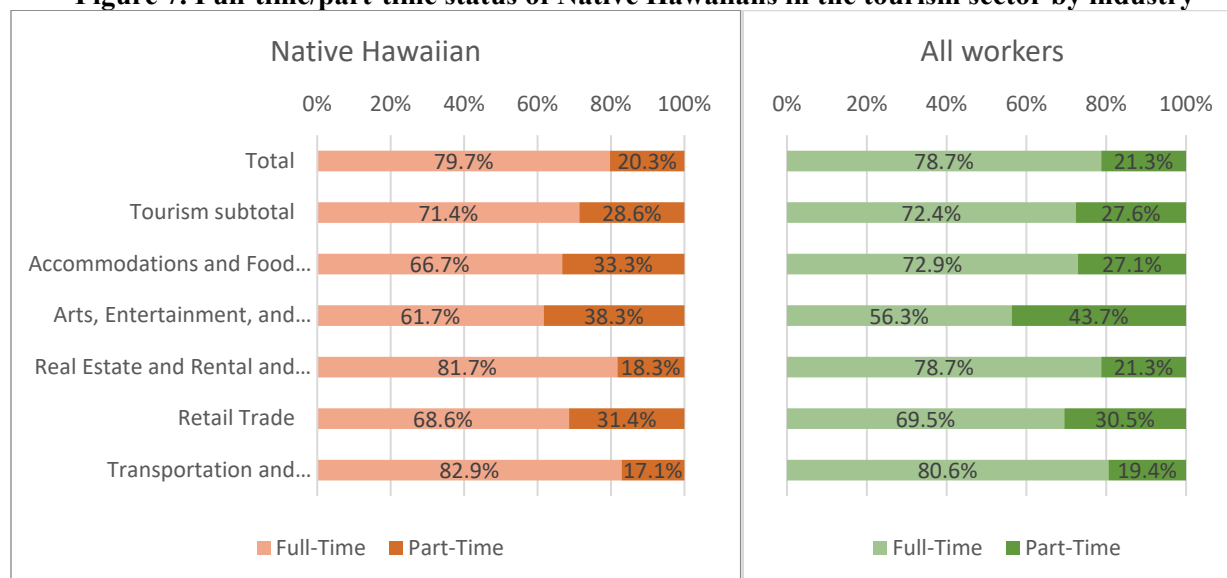
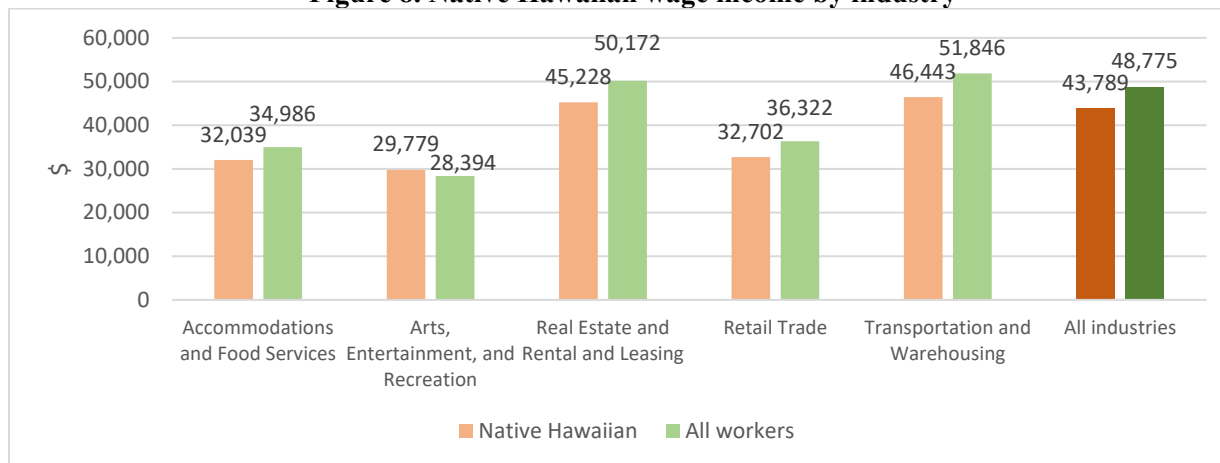


Table 3. Full-time/part-time status of Native Hawaiians in the tourism sector by industry

	Native Hawaiian			All workers		
	Full-Time	Part-Time	Total	Full-Time	Part-Time	Total
Accommodation and Food Services	11,003	5,489	16,492	70,927	26,333	97,260
Arts, Entertainment, and Recreation	2,078	1,292	3,370	9,290	7,218	16,508
Real Estate and Rental and Leasing	3,064	685	3,749	17,966	4,848	22,814
Retail Trade	10,506	4,810	15,316	52,406	23,014	75,420
Transportation and Warehousing	8,232	1,703	9,935	28,271	6,823	35,094
Tourism subtotal	34,883	13,979	48,862	178,860	68,236	247,096
Total	106,655	27,085	133,740	534,161	144,281	678,442

Figure 8. Native Hawaiian wage income by industry



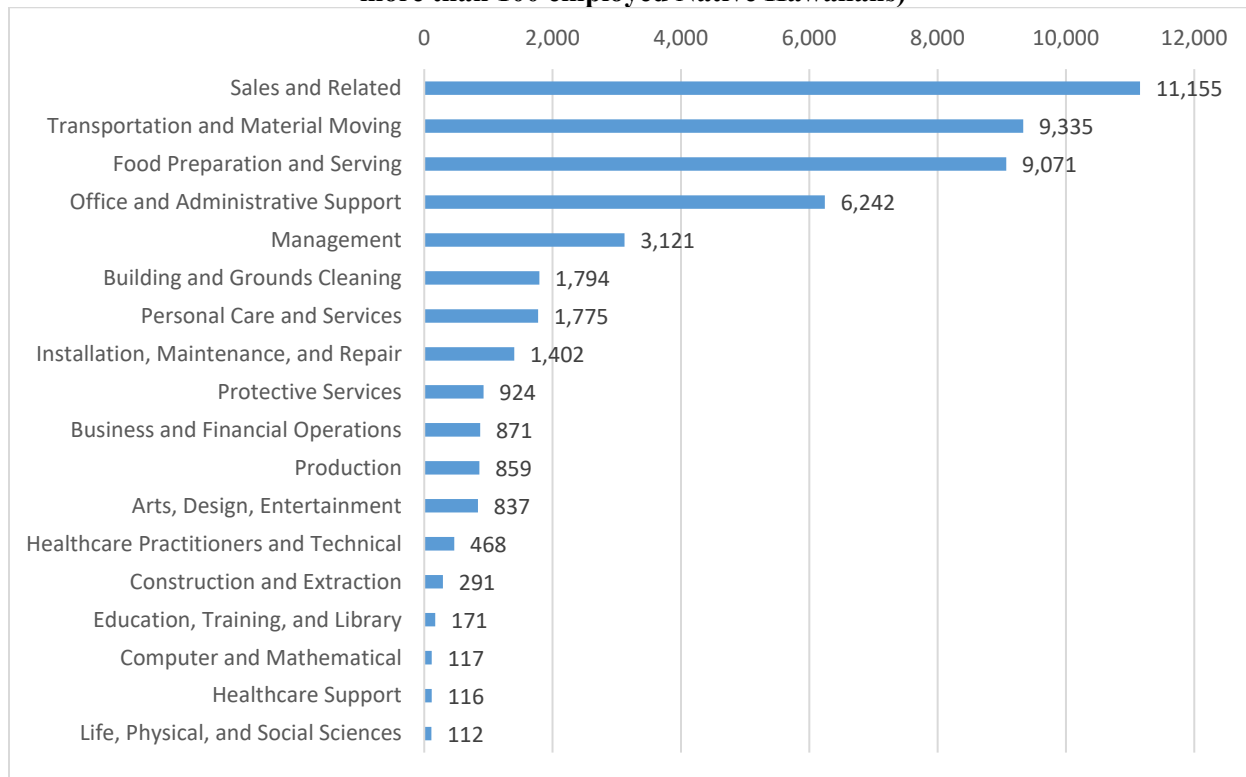
The average wage and salary income of Native Hawaiians was lower than the state level in each of the tourism intensive industries. In all tourism intensive industries except the real estate and rental and leasing industry and the transportation and warehousing industry, the income level was lower than the state average, no matter among Native Hawaiians or all employed persons.

Employment and Wage by Occupation

Of those Native Hawaiians employed in Hawaii's tourism sector, more had sales and related jobs than any other occupations.⁴ Between 2015 and 2019, 11,155 Native Hawaiians worked in sales and related jobs. Transportation and material moving occupations were the next populated occupation, in which 9,335 Native Hawaiians were employed. The other occupations with more than six thousand Native Hawaiians were the food preparation and serving related occupations and office and administrative support occupations.

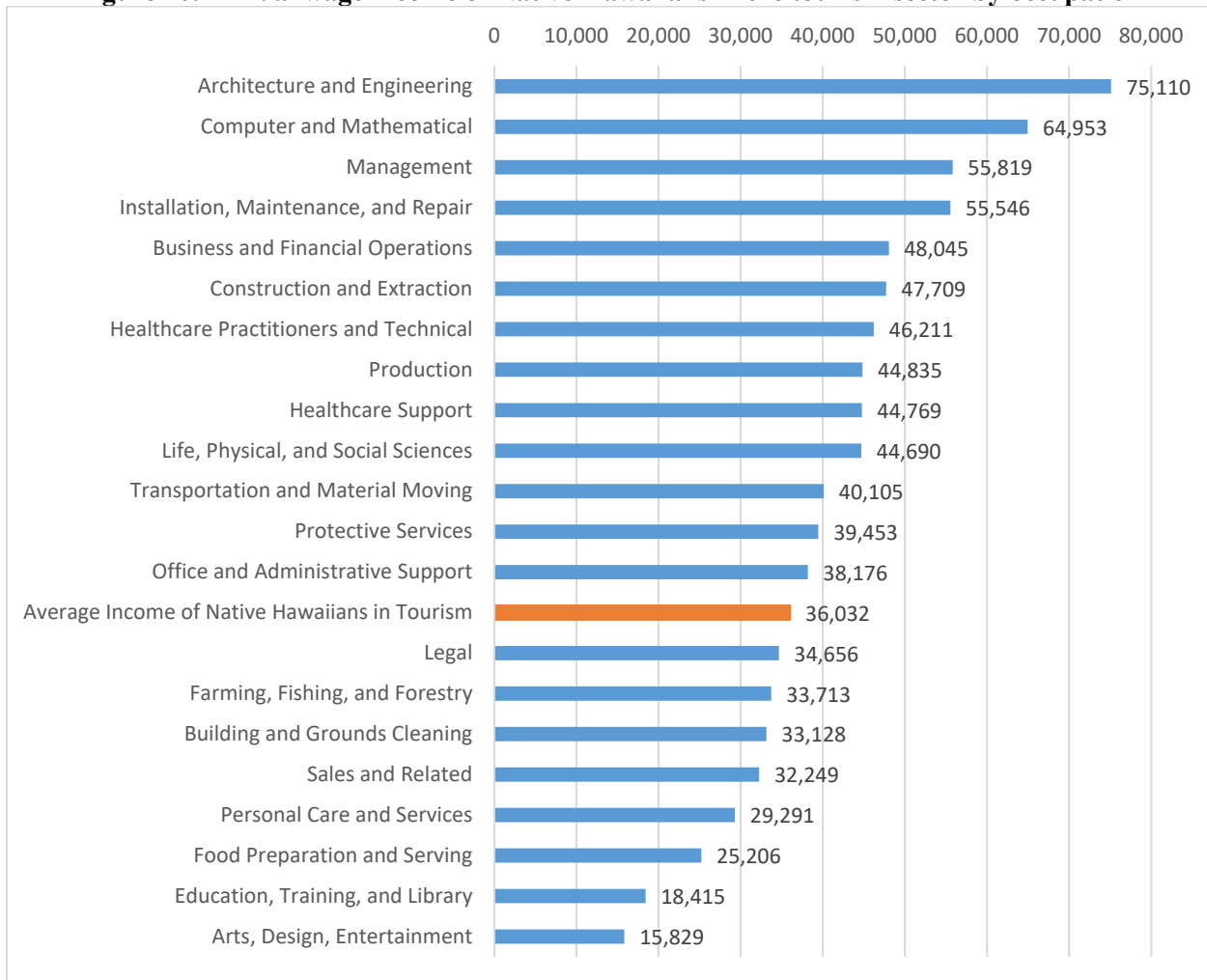
⁴ In 2018, the Standard Occupational Classification (SOC) system was updated. Accordingly, caution is advised when doing comparisons of occupations between the 2017 report and this updated report. For more information, see “What’s New in the 2018 SOC”, available at https://www.bls.gov/soc/2018/soc_2018_whats_new.pdf.

Figure 9. Employment of Native Hawaiians in the tourism sector by occupation (occupations with more than 100 employed Native Hawaiians)



In these four most common occupations by Native Hawaiians, transportation and material moving and office and administrative support occupations had average annual incomes above the average annual income of Native Hawaiians in the entire tourism sector of \$36,032; sales and related occupations and food preparation and serving occupations had average annual incomes below this average. In two of the three most well-paid occupations for Native Hawaiians — architecture and engineering occupations and computer and mathematical — there were few Native Hawaiians employed, with 64 in architecture and engineering jobs and 117 in computer and mathematical management jobs.

Figure 10. Annual wage income of Native Hawaiians in the tourism sector by occupation



On average, Native Hawaiians in the tourism industry were paid around 7 percent less than the average worker in the tourism industry, around \$36,000 compared to \$38,750. Native Hawaiians worked in computer and mathematical occupations, healthcare support occupations, and farming, fishing, and forestry occupations were paid the most relative to all workers in the respective occupations, as much as 34.3 percent more for computer and mathematical occupations. Conversely, Native Hawaiians in the tourism industry were paid significantly less in the education, training, and library occupations; legal occupations; and arts, design, entertainment, sports, and media occupations. In the education, training, and library occupations, Native Hawaiians in the tourism sector were paid less than 60 percent of the average worker (just under \$18,500, compared to around \$31,900).

Table 4. Employment and average wage income of Native Hawaiians in the tourism sector by occupation

	Employment			Average wage income (\$)		
	Native Hawaiian	State Total	NH as % of State	Native Hawaiian	State Total	NH as % of State
Architecture and Engineering	64	360	17.8%	75,110	68,732	109.3%
Arts, Design, Entertainment, Sports, and Media	837	4,799	17.4%	15,829	22,163	71.4%
Building and Grounds Cleaning and Maintenance	1,794	17,036	10.5%	33,128	34,444	96.2%
Business and Financial Operations	871	4,858	17.9%	48,045	56,340	85.3%
Community and Social Service	0	34	0.0%	-	6,536	-
Computer and Mathematical	117	774	15.1%	64,953	48,374	134.3%
Construction and Extraction	291	1,349	21.6%	47,709	52,607	90.7%
Education, Training, and Library	171	1,164	14.7%	18,415	31,911	57.7%
Farming, Fishing, and Forestry	66	241	27.4%	33,713	28,699	117.5%
Food Preparation and Serving Related	9,071	54,214	16.7%	25,206	27,503	91.6%
Healthcare Practitioners and Technical	468	2,291	20.4%	46,211	60,792	76.0%
Healthcare Support	116	829	14.0%	44,769	36,424	122.9%
Installation, Maintenance, and Repair	1,402	6,717	20.9%	55,546	54,000	102.9%
Legal	71	124	57.3%	34,656	49,507	70.0%
Life, Physical, and Social Science	112	433	25.9%	44,690	48,293	92.5%
Management	3,121	20,744	15.0%	55,819	68,114	81.9%
Office and Administrative Support	6,242	25,920	24.1%	38,176	39,906	95.7%
Personal Care and Service	1,775	8,080	22.0%	29,291	26,592	110.1%
Production	859	4,437	19.4%	44,835	41,054	109.2%
Protective Service	924	3,097	29.8%	39,453	35,794	110.2%
Sales and Related	11,155	57,428	19.4%	32,249	36,862	87.5%
Transportation	9,335	32,167	29.0%	40,105	40,672	98.6%
Total	48,862	247,096	19.8%	36,032	38,750	93.0%