

NATIVE HAWAIIANS IN HAWAI'I'S TOURISM SECTOR – 2025 UPDATE

FEBRUARY 2025



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Executive Summary

Between 2019 and 2023, an average of 46,786 Native Hawaiians worked in tourism intensive industries per year. There was a slight decline in the number of Native Hawaiians who worked in the tourism sector (-1.4%), and in the number of tourism sector workers overall (-4.7%), compared to the 2017-2021 period. This is consistent with the updated data including tourism's ongoing recovery from the effects of the COVID-19 pandemic and the impacts of the Maui wildfire tragedy on August 8, 2023. The share of Native Hawaiians in the tourism sector increased slightly to just over 20 percent of total workers. Native Hawaiian workers in tourism intensive industries accounted for 34.9 percent of Native Hawaiian workers in all the industries, slightly lower than the 35.5 percent of Native Hawaiian workers between 2017 and 2021.

Compared with all of the employees in the tourism intensive industries, Native Hawaiian workers were generally younger, more likely to be single, and more likely to have a high school diploma (but less likely to have a bachelor's degree or graduate or professional degree). The average earnings of Native Hawaiian workers was lower than the average earnings of all workers in the state's tourism intensive industries. More Native Hawaiians were wage and salary employees, including private sector and government employees, at 94.1 percent of workers compared to 90.1 percent for all workers in tourism intensive industries.

The top five occupations for Native Hawaiian workers in the tourism sector based on employment were in sales, food preparation and serving, transportation and material moving, office and administrative support, and management. However, in terms of Native Hawaiians' share in the occupation category for tourism intensive industries, architecture and engineering occupations had the largest share of Native Hawaiians at 38.2 percent; followed by life, physical, and social sciences at 32.5 percent; transportation and material moving at 28.7 percent; office and administrative support at 24.3 percent and production at 21.2 percent.

Native Hawaiians in Hawai‘i’s Tourism Sector

This report is an overview of Native Hawaiians who were employed in Hawai‘i’s tourism sector¹. The focus of the report 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 used is from the U.S. Census Bureau, 2019-2023 American Community Survey (ACS) 5-year Public Use Microdata Sample (PUMS). This period includes the year 2020, during which COVID-19 pandemic was declared, the years 2021 and 2022, during which tourism continued to recover from the effects of the pandemic, and the Maui wildfire tragedy, which occurred on August 8, 2023.

Demographic Characteristics

From 2019 to 2023, an average of 46,786 Native Hawaiians² were employed each year in Hawai‘i’s tourism sector, accounting for just over 20 percent of the sector’s 228,038 employees.³ The shares of Native Hawaiian male and female workers were the same. Among all workers, there were slightly more male workers than female workers in the tourism sector.

On average, Native Hawaiian employees tended to be younger than all employees in the tourism sector; over half (58.1 percent) of Native Hawaiians in the tourism industry were under the age of 40, compared with 46.8 percent of all employees in tourism.

Figure 1. Native Hawaiians in the tourism sector by gender

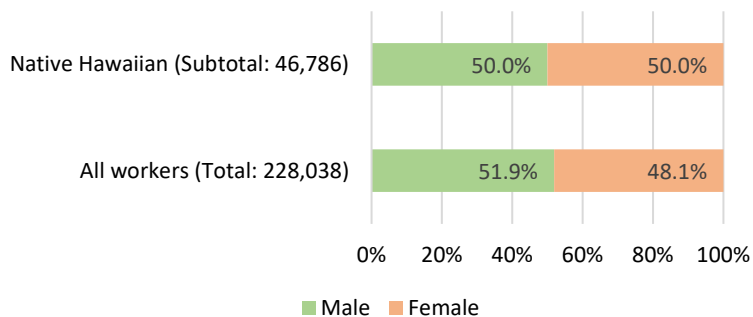
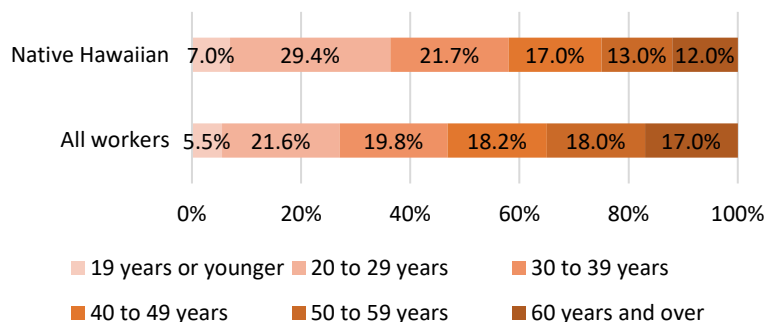


Figure 2. Native Hawaiians in the tourism sector by age



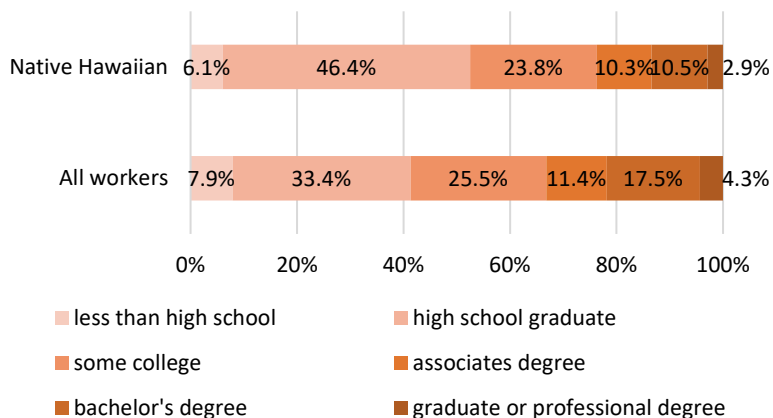
¹ According to the North American Industry Classification System (NAICS), tourism is not classified as an industry. Most tourism studies define tourism as a sector which consists of the partial assignment of industries such as accommodation, food services, retail trade, transportation, and so on. This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

²For the purposes of this report, Native Hawaiians are defined using the “RACNH” variable in the PUMS. “RACNH” is a variable indicating whether the respondent identified as Native Hawaiian alone or in combination with one or more races.

³ This report includes data for all civilians employed in the State of Hawai‘i, with a focus on tourism-intensive industries. It does not include those who were in the armed forces, unemployed, or not in the labor force.

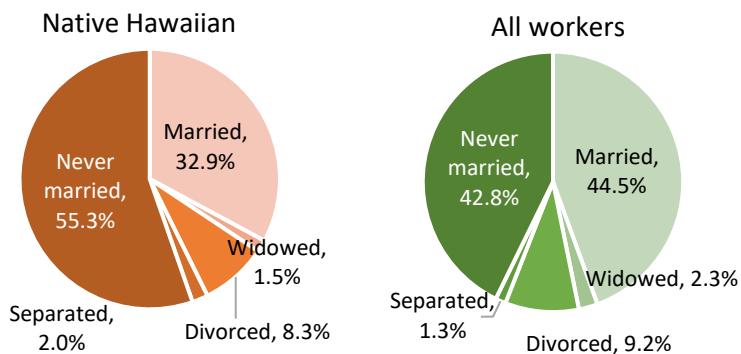
Just under half of Native Hawaiian employees in the tourism sector had an educational attainment of high school graduate, compared with about one third of all employees in tourism. Shares of employees with some college education, or with an associate’s degree were similar between Native Hawaiian and all workers. However, 13.4 percent of Native Hawaiian employees had a bachelor’s, graduate, or professional degree, compared with 21.8 percent among all tourism industry workers in Hawai‘i.

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



More than half of Native Hawaiian employees were never married, over 12 percentage points higher than for all workers. This may be related to the fact that Native Hawaiian employees were younger, on average, than all workers in Hawai‘i’s tourism sector.

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



Employment and Earnings by Industry

In Hawai‘i’s tourism sector, the retail industry had the largest group of Native Hawaiian workers, 17,184 in total, followed by the accommodation and food services industry, where 14,027 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 employed.

Across all five industries, most Native Hawaiians were employed in Honolulu County, followed by Maui, Kalawao and Kaua‘i County⁴, except in arts, entertainment, and recreation, where Hawai‘i County had more Native Hawaiian workers than Maui, Kalawao and Kaua‘i County.

⁴ In the U.S. Census American Community Survey data, Maui, Kalawao and Kauai Counties are combined. The U.S. Census Bureau recognizes 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

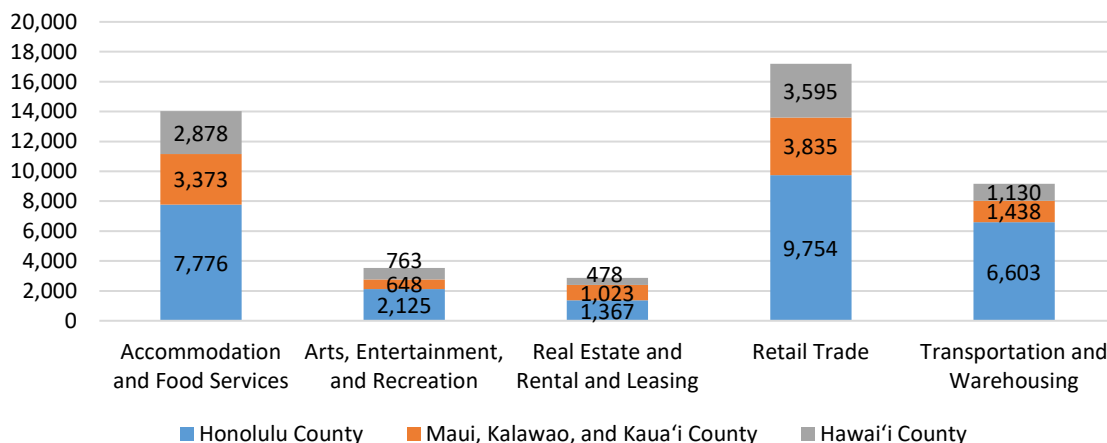


Table 1. Employment of Native Hawaiians in the tourism sector by industry and county

Industry	Native Hawaiian				All workers			
	Honolulu County	Maui, Kalawao, and Kaua‘i County	Hawai‘i County	Total	Honolulu County	Maui, Kalawao, and Kaua‘i County	Hawai‘i County	Total
Accommodation and Food Services	7,776	3,373	2,878	14,027	51,377	20,956	10,930	83,263
Arts, Entertainment, and Recreation	2,125	648	763	3,536	10,168	3,974	2,452	16,594
Real Estate and Rental and Leasing	1,367	1,023	478	2,868	10,834	5,580	3,148	19,562
Retail Trade	9,754	3,835	3,595	17,184	49,489	13,224	10,015	72,728
Transportation and Warehousing	6,603	1,438	1,130	9,171	27,159	5,225	3,507	35,891
Tourism subtotal	27,625	10,317	8,844	46,786	149,027	48,959	30,052	228,038
Total	83,558	24,770	25,912	134,240	462,028	117,113	87,915	667,056

In Hawai‘i’s tourism sector, 88.0 percent of Native Hawaiians were private sector wage and salary (“W&S”) workers, compared with 85.1 percent of all employees in tourism.⁵ The percentage of private sector wage and salary workers tends to be higher in tourism compared to all industries, among both Native Hawaiian and all workers. The share of government workers is lower in tourism compared to the total of all industries. Approximately six percent of Native Hawaiian workers in the tourism sector were government employees while five percent of all workers in the tourism

⁵ In prior reports regarding Native Hawaiians in Hawai‘i’s Tourism Sector, wage and salary employees included both private sector wage and salary employees and government employees. This report disaggregates the reporting of wage and salary workers into those who work for the government and those who work for the private sector.

sector were government employees. Across all industries, 22.1 percent of Native Hawaiians and 21.1 percent of all workers were government employees.

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

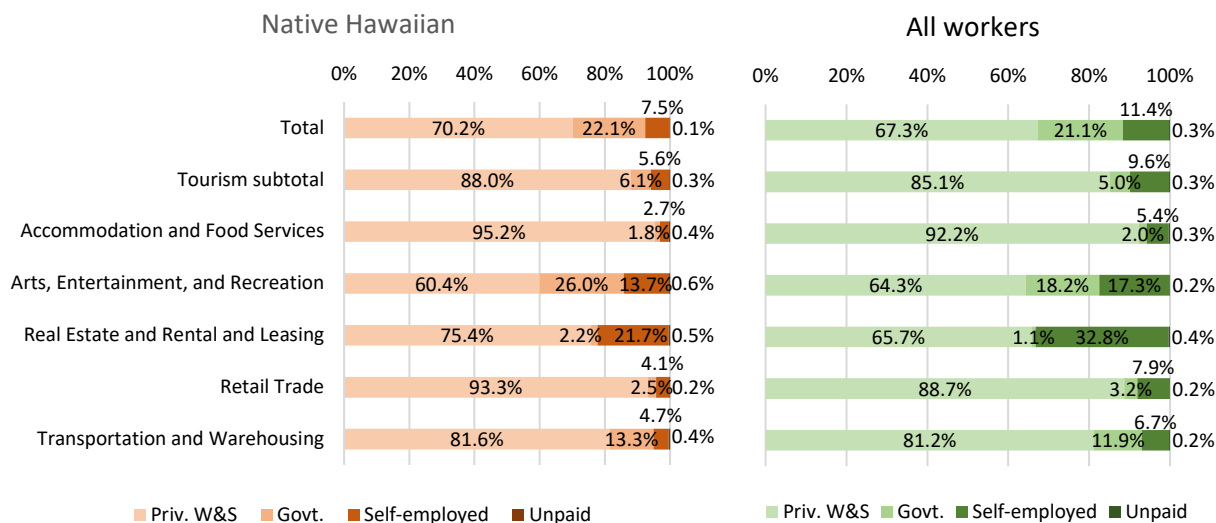


Table 2. Employment status of Native Hawaiians in the tourism sector by industry

Industry	Native Hawaiian					All workers				
	Private sector W&S	Govt.	Self-employed	Unpaid	Total	Private sector W&S	Govt.	Self-employed	Unpaid	Total
Accommodation and Food Services	13,352	246	377	52	14,027	76,799	1,682	4,520	262	83,263
Arts, Entertainment, and Recreation	2,135	918	483	0	3,536	10,673	3,014	2,877	30	16,594
Real Estate and Rental and Leasing	2,163	62	622	21	2,868	12,858	208	6,413	83	19,562
Retail Trade	16,041	428	701	14	17,184	64,517	2,326	5,758	127	72,728
Transportation and Warehousing	7,487	1,216	430	38	9,171	29,142	4,260	2,401	88	35,891
Tourism subtotal	41,178	2,870	2,613	125	46,786	193,989	11,490	21,969	590	228,038
Total	94,296	29,719	10,057	168	134,240	448,897	140,532	75,948	1,679	667,056

For each tourism intensive industry, the share of private sector wage and salary workers among Native Hawaiians was higher than for all workers except in arts, entertainment and recreation. The accommodation and food service industry saw the greatest share of private sector wage and salary workers, with 95.2 percent among Native Hawaiians and 92.2 percent among all workers. For arts, entertainment and recreation, the share of private sector wage and salary workers was 60.4 percent among Native Hawaiians and 64.3 percent among all workers. Among the tourism intensive industries, the highest share of government workers was in arts, entertainment, and recreation, at 26.0 percent of Native Hawaiian workers and 18.2 percent of all workers. The largest share of self-employed workers was in the real estate and rental and leasing industry, with 21.7 percent of Native Hawaiian workers and 32.8 percent of all workers being self-employed. Relatively few Native

Hawaiians were unpaid workers, accounting for 0.3 percent of all Native Hawaiians workers in tourism.

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

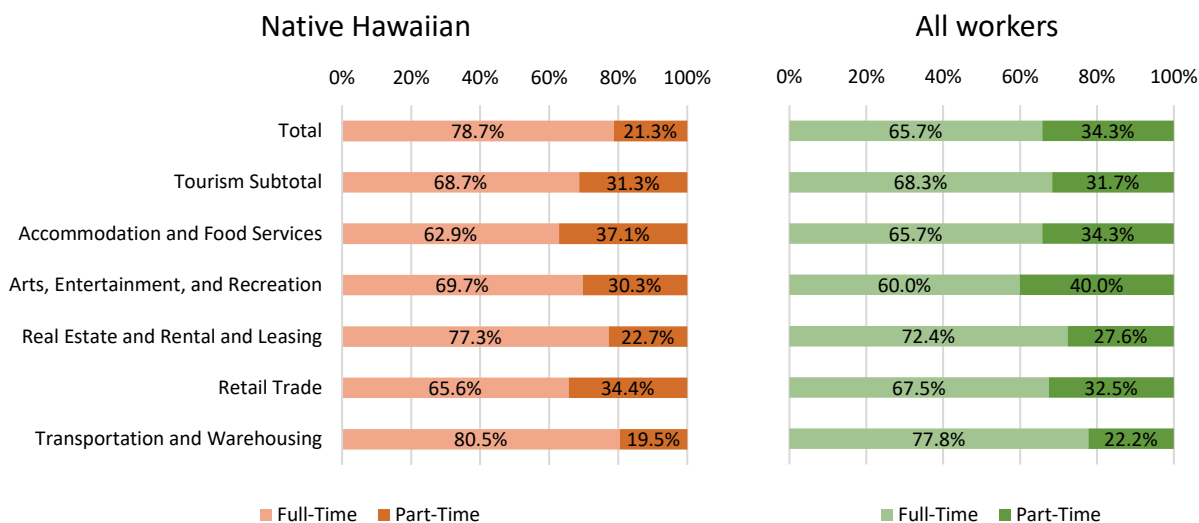


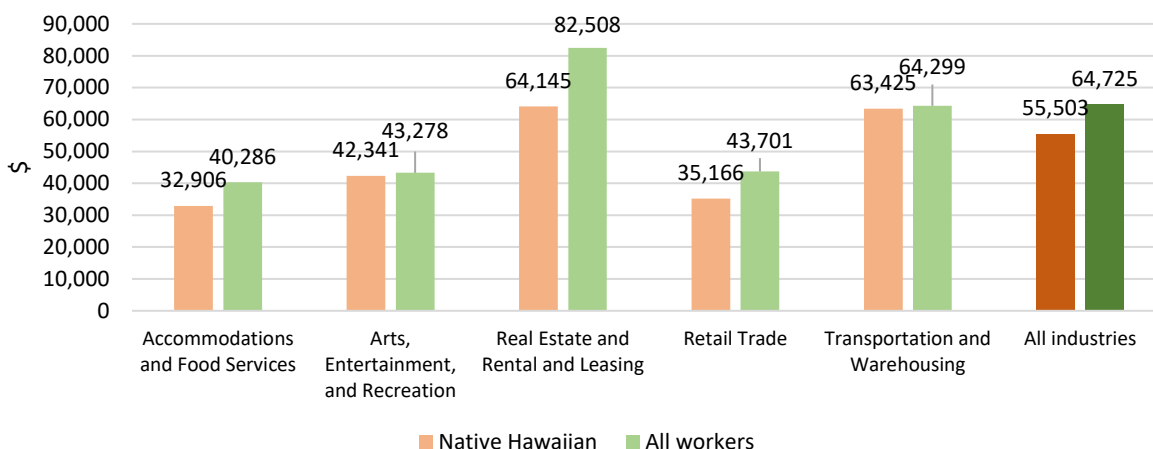
Table 3. Full-time/part-time status of Native Hawaiians in the tourism sector by industry

Industry	Native Hawaiian			All workers		
	Full-Time	Part-Time	Total	Full-Time	Part-Time	Total
Accommodation and Food Services	8,818	5,209	14,027	54,739	28,524	83,263
Arts, Entertainment, and Recreation	2,465	1,071	3,536	9,952	6,642	16,594
Real Estate and Rental and Leasing	2,216	652	2,868	14,159	5,403	19,562
Retail Trade	11,274	5,910	17,184	49,076	23,652	72,728
Transportation and Warehousing	7,385	1,786	9,171	27,912	7,979	35,891
Tourism subtotal	32,158	14,628	46,786	155,838	72,200	228,038
Total	105,620	28,620	134,240	514,133	152,923	667,056

While Native Hawaiians were more likely to be full-time workers among all industries relative to all workers, the percentages of full-time and part-time workers in the tourism sector were similar for Native Hawaiian workers and for all workers.⁶ Native Hawaiians were more likely to be full-time workers in the arts, entertainment and recreation; real estate and rental and leasing; and transportation and warehousing industries but less likely to be full-time workers in accommodations and food services and retail trade when compared to all workers.

⁶ For the purposes of this report, full-time work is defined as usually working 35 or more hours per week.

Figure 8. Average Native Hawaiian earnings by industry (2023 \$)



The average earnings of Native Hawaiian workers was lower than the average earnings of all workers in each of the tourism intensive industries.⁷ Looking across all industries, the average earnings for Native Hawaiian workers was about \$9,200 less than the average earnings for all workers. Average earnings in accommodations and food services; arts, entertainment, and recreation; and retail trade were lower compared to the state average earnings whether Native Hawaiian workers or all workers are considered. Jobs in accommodations and food services and retail trade comprised over two-thirds of the total employment in the tourism intensive industries.

Employment and Earnings by Occupation

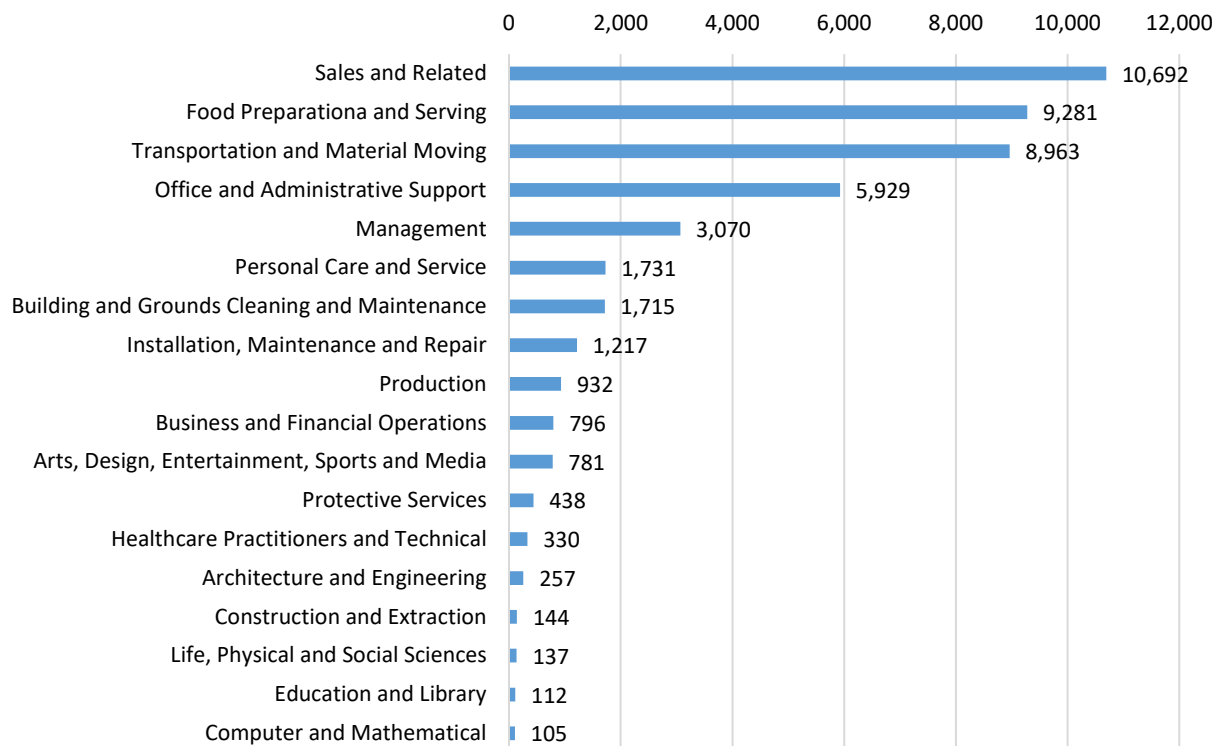
Of those Native Hawaiians employed in Hawai‘i’s tourism sector, more were in the sales and related occupation than any other occupation.⁸ Between 2019 and 2023, an average of 10,692 Native Hawaiians worked in sales and related jobs. Food preparation and serving followed as the next most populated occupation, with 9,281 Native Hawaiian workers. Transportation and material moving occupations was third, with 8,963 Native Hawaiians employed, followed by office and administrative support, with 5,929 Native Hawaiians employed.⁹

⁷ Average earnings include wage and salary income as well as self-employment income. The average earnings of both full-time and part-time employees are included.

⁸ In 2018, the Standard Occupational Classification (SOC) system was updated. Accordingly, caution is advised when doing comparisons of occupations between the 2017 report and subsequent reports. For more information, see “2018 Standard Occupation Classification System”, available at https://www.bls.gov/soc/2018/major_groups.htm.

⁹ Note that occupation categories are distinct from industry categories. For example, the Arts, Design, Entertainment industry (NAICS 71) may include workers with occupations in Arts, Design, Entertainment, Sports, and Media (SOC 27-0000) as well as in personal care and service (SOC 39-0000), building and grounds cleaning and maintenance (SOC 37-0000), management (SOC 11-0000), sales and related (SOC 41-0000), etc.

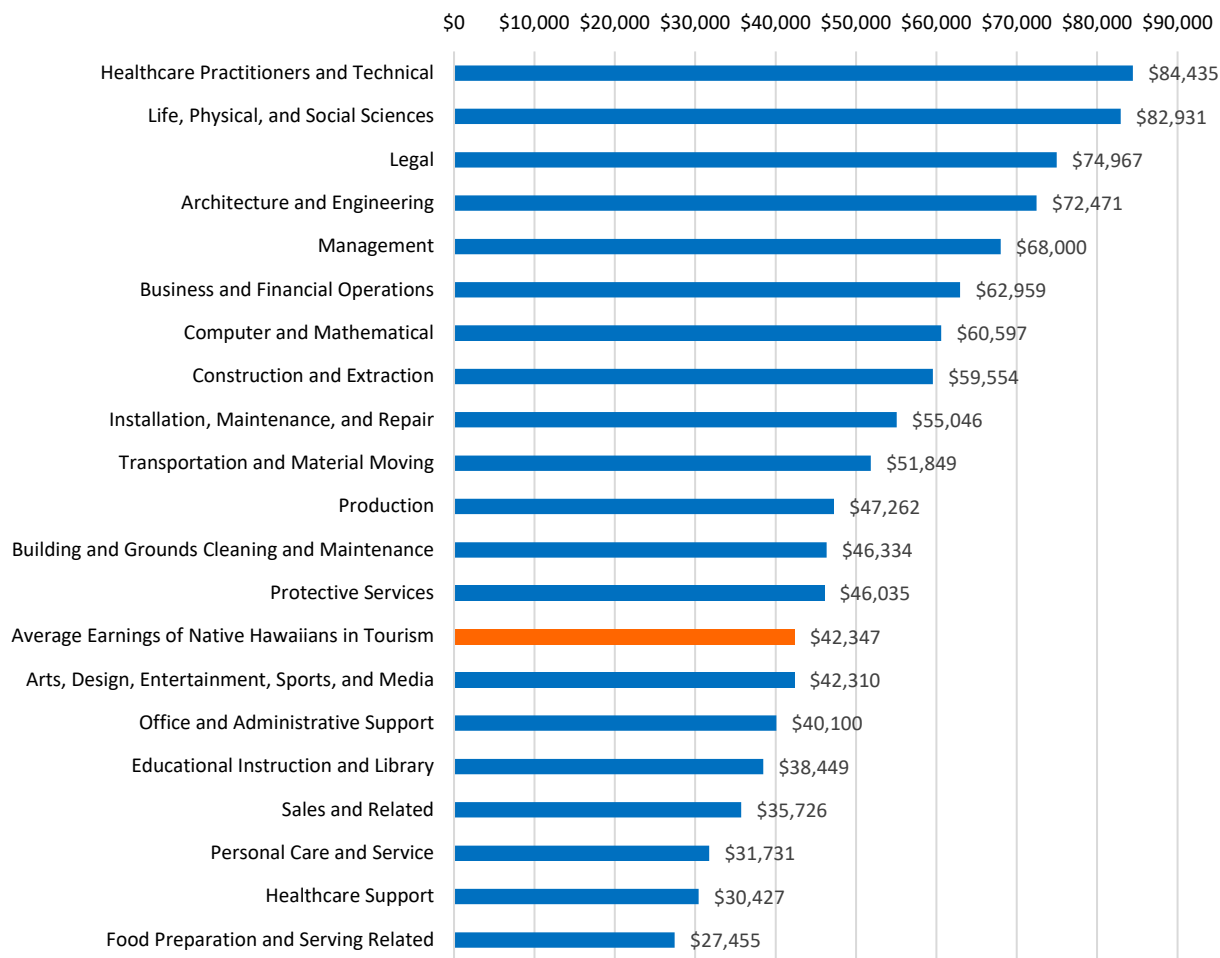
Figure 9. Employment of Native Hawaiians in the tourism sector by occupation (occupations with more than 100 employed Native Hawaiians)



In these four most common occupations by Native Hawaiians, only the transportation and material moving occupation had average annual earnings above the average annual earnings of Native Hawaiians in the tourism sector of \$42,347; sales and related occupations, food preparation and serving occupations, and office and administrative support occupations had average annual earnings below this average. By comparison, the three highest paid occupations for Native Hawaiians in the tourism sector – healthcare practitioners and technical, life, physical science, and social sciences, and legal – employed fewer workers (330, 137, and 52 Native Hawaiian workers, respectively).¹⁰

¹⁰ Average earnings may change significantly between surveys due to variations in the sample size and the composition of full-time and part-time workers, as well as due to the composition of sub-occupations within higher level occupation groups.

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



On average, Native Hawaiians in the tourism industry were paid 13.6 percent less than the average worker in the tourism industry, around \$42,347 compared to \$48,994. Native Hawaiians who worked in life, physical, and social sciences; healthcare practitioners and technical; and building and grounds cleaning and maintenance occupations were paid the most when compared to all workers in those respective occupations, as much as 24.4 percent more in life, physical, and social sciences occupations. Conversely, Native Hawaiians in the tourism industry were paid significantly less in the legal, sales and related, and educational instruction and library occupations. In legal occupations, Native Hawaiians in the tourism sector were paid 50.2 percent of the average worker's income (\$74,967 compared to \$149,384).

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

Occupation	Employment			Average earnings (\$)		
	Native Hawaiian	State Total	NH as % of State	Native Hawaiian	State Total	NH as % of State
Architecture and Engineering	257	672	38.2%	72,471	80,805	89.7%
Arts, Design, Entertainment, Sports, and Media	781	4,656	16.8%	42,310	42,518	99.5%
Building and Grounds Cleaning and Maintenance	1,715	13,005	13.2%	46,334	42,644	108.7%
Business and Financial Operations	796	4,642	17.1%	62,959	67,947	92.7%
Community and Social Services	0	77	0.0%	-	25,936	n.a.
Computer and Mathematical	105	1,074	9.8%	60,597	79,697	76.0%
Construction and Extraction	144	901	16.0%	59,554	73,065	81.5%
Educational Instruction and Library	112	1,362	8.2%	38,449	53,622	71.7%
Farming, Fishing, and Forestry	4	121	3.3%	n.r.*	41,833	n.a.
Food Preparation and Serving Related	9,281	46,830	19.8%	27,455	30,539	89.9%
Healthcare Practitioners and Technical	330	2,046	16.1%	84,435	70,950	119.0%
Healthcare Support	100	650	15.4%	30,427	34,689	87.7%
Installation, Maintenance, and Repair	1,217	5,998	20.3%	55,046	59,977	91.8%
Legal	52	319	16.3%	74,967	149,384	50.2%
Life, Physical, and Social Sciences	137	421	32.5%	82,931	66,640	124.4%
Management	3,070	22,256	13.8%	68,000	86,970	78.2%
Office and Administrative Support	5,929	24,403	24.3%	40,100	42,787	93.7%
Personal Care and Service	1,731	8,618	20.1%	31,731	31,983	99.2%
Production	932	4,402	21.2%	47,262	45,325	104.3%
Protective Services	438	2,186	20.0%	46,035	45,381	101.4%
Sales and Related	10,692	52,143	20.5%	35,726	50,232	71.1%
Transportation and Material Moving	8,963	31,256	28.7%	51,849	51,580	100.5%
Total – Tourism Sector	46,782	227,917	20.5%	42,347	48,994	86.4%

*Farming, Fishing, and Forestry average earnings for Native Hawaiian workers not reported due to small sample size.