

VISITOR INDUSTRY WORKFORCE NEEDS ASSESSMENT

Prepared for:
Hawai'i Tourism Authority
Tourism Research



Submitted by Anthology Research
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Aloha,

Hawaii's visitor industry workforce has faced extreme difficulties due to the COVID-19 pandemic, with many businesses ceasing operations through early stages of the pandemic with a slow return to normal. However, the industry has also experienced a decline in the available workforce pipeline in recent years. Job seekers look to opportunities outside of tourism and many organizations report a mismatch in skills required for the job and the applicants. While the State of Hawaii provides hard and soft skills assessment tools for job seekers, due to the unique needs of the visitor industry, many businesses offer training to ensure employees are sufficiently prepared for the job.

The Hawaii Tourism Authority (HTA) commissioned Anthology Research, an independent research company in Hawaii, to conduct an assessment of the current and future workforce needs of Hawaii's visitor industry and related sectors so that we could begin to obtain information and data to help determine the type of skills and training (including workshops/ classes) that are needed in Hawaii's visitor industry. This initiative is part of HTA's 2020-2025 Strategic Plan supporting the Community pillar to build a resilient visitor industry workforce and community. The results of this research will help to inform that the right training, classes and programs are developed and offered now and into the future.

As part of the Community, HTA works to make sure residents and local communities benefit from tourism by supporting programs valued by the community and aligned with the destination's brand and image; informing both residents and visitors of these programs and events; strengthening relations between residents and visitors; and forming partnerships to build a resilient tourism workforce and community. Results from this research will be shared with other government agencies, educational institutions, and organizations that work in the area of workforce development

We would like to thank all those who participated in this multi-phase research study, which required input from businesses across multiple visitor-related industries in the state. Your time and valuable insights have provided an important and special understanding of your needs and challenges.

Sincerely,

John De Fries
President and Chief Executive Officer
Hawaii Tourism Authority

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METHODOLOGY

The Hawai'i Tourism Authority (HTA) contracted Anthology Research to conduct an assessment of the current and future workforce development needs of Hawai'i's visitor industry and related sectors, in order to determine the types of skills and training/workshops/classes that are needed in Hawai'i's visitor industry. This initiative is a part of HTA's 2020-2025 Strategic Plan, supporting its Community pillar to build a resilient visitor industry workforce and community. The research will help to ensure that pertinent projects and training programs are being developed to address the needs both currently and for the future.

To inform the design of the research study, Anthology held formative discussions in Fall 2021 with visitor industry stakeholders representing business, organized labor, education and trade organizations. The information gathered from these discussions were instrumental in the development of the areas of inquiry for this effort.

This report includes the results of the Hawai'i Tourism Authority Visitor Industry Workforce Needs Assessment, which was comprised of four components:

1. Quantitative Survey of Visitor Industry Stakeholders - mixed mode (online and telephone)
2. Qualitative Research - Focus groups and in-depth interviews with industry stakeholders
3. Secondary Research - State and Federal data on current and future job growth
4. Added Value: Online survey of Hawai'i residents to gauge perceptions of the visitor industry as an employer

1. Quantitative Study: Mixed-Mode Survey

Anthology Research utilized a mixed-mode methodology for data collection that included online (email) and telephone outreach. Online data were collected using the Qualtrics software program. Anthology professional interviewers calling from the company's in-house call center completed the telephone interviews.

In addition, invitations to complete the survey were distributed through trade associations, business organizations and other networks to ensure all sectors related to Hawai'i's visitor industry had an opportunity to respond. The collected responses were reviewed to ensure only one response per entity was included in the final data set.

To ensure clarity and comprehension, a pre-test of the survey was conducted in early February; feedback gathered from the pre-test was used to make minor changes to the questionnaire before it was finalized.

Fielding of the survey began on February 11, 2022 and ended on July 17, 2022. A total of 452 completed surveys were collected from organizations statewide during this time period. A survey

response was considered “complete” if it included a response to question 19. The margin of error for a statewide sample of this size (n=452) is +/- 4.61 percentage points with a 95% confidence level. An additional 103 partially completed surveys are included in the report to provide further insight into the overall landscape of the visitor industry workforce.

Screening questions were asked in order to ensure that the responding organization was involved in some way in the visitor industry. Only individuals with knowledge of their company’s workforce practices and policies were included.

Multiple sample sources were used in order to reach a wide array of employers in Hawai’i with some connection to the visitor industry.

- Publicly available business databases, including Dunn & Bradstreet
- Anthology’s proprietary database of Hawai’i businesses
- Contact information provided by HTA
- Trade / Business organizations: An invitation to complete the survey was sent through a number of organizations across the state.

In order to encourage participation in the survey, an incentive was offered in the form of a raffle to receive one of five \$250 gift cards, provided by Anthology Research. Five winners were randomly selected among respondents to the survey.

The questionnaire was designed by Anthology with input and approval by HTA. A copy of the questionnaire utilized in this study is included in the appendix to this report.

2. Qualitative Study: Executive Research Interviews

To complement and gather in-depth insights learned from the quantitative research study, Anthology conducted qualitative research in the form of small group and one-on-one research interviews with 36 executives of local organizations in the visitor industry. The audience for the research was comprised of larger visitor industry employers statewide, which typically have a larger capacity to dedicate budget and resources to employee training programs. A representative mix of visitor industry businesses from the following sectors were included in this research:

- Accommodations
- Attractions
- Events
- Professional Services/ Miscellaneous
- Restaurant/ Food & Beverage
- Retail/ Manufacturing
- Tour Operators
- Transportation

The discussions were held June 27, 2022 to August 9, 2022, by Anthology Research both in person and virtually using videoconferencing software and recorded for transcription and documentation purposes. To protect the confidentiality of the participants, portions of some quotes have been redacted to prevent unintentionally identifying the business or identity of the individual. Participants were offered a gratuity, provided by Anthology Research, as a thank you for their time.

The discussion outline used in these research interviews was developed by Anthology Research, with input from the client. Contained in the appendix of this report is a copy of the discussion outline.

Note: Qualitative research offers its sponsor the type of dynamic feedback necessary to make decisions required in today's ever-changing business environment. The client needs to keep in mind there are strengths and weaknesses inherent in this form of research because of the relatively small sample sizes used in this methodology. One of the great strengths is the ability to discuss in depth the issue being explored. This technique ensures that the full range of opinions, emotions and reasoning surrounding a topic are brought out. However, while the results are excellent at providing trending and directional information, they are not necessarily statistically projectable to the general population.

3. Secondary Research

This study required preliminary secondary research to provide a frame of reference for workforce development and needs assessment efforts, as well as information on job skills and reskilling training. This portion of the secondary research was conducted ahead of the design of the various research instruments. Resources consulted included state government and workforce agencies (both Hawai'i and other states), higher educational institutions, industry trade associations and societies, chambers of commerce, and several articles published by well-known organizations and consulting firms. To identify current and future job growth within the state of Hawai'i, data from the U.S. Department of Labor, U.S. Bureau of Labor Statistics, State of Hawai'i Department of Business, Economic Development & Tourism (DBEDT) and State of Hawai'i Department of Labor and Industrial Relations (DLIR) were included and cited in this report.

4. Supplemental Quantitative Resident Survey

In order to understand resident perceptions of the visitor industry as an employer and provide a point of comparison to businesses' point of view, Anthology Research conducted a supplemental survey of Hawai'i residents. As part of Anthology Research's omnibus (shared resources) survey, residents were asked to rate the visitor industry on six areas related to local employment opportunities.

The survey was conducted among a random sample of Hawai'i residents online, using the Qualtrics platform. Research respondents were screened to ensure they were 18 years of age or older and were fulltime residents of the state of Hawai'i.

A total of 461 surveys were completed June 14-27, 2022. The margin of error for a sample of this size is +/-4.56 percentage points with a 95% confidence level. Data were weighted to represent the correct proportion of adults by ethnicity and island.

The sample for this online study was provided by third-party online sample providers, augmented by Anthology Research's proprietary panel of Hawai'i residents who have opted in to take part in research studies.

The questionnaire used in this study was developed by Anthology Research with input from the client and is presented in the appendix of this report.

Acknowledgements

Anthology Research would like to thank HTA for their close involvement in each phase of this research and input into this report, including Kalani Ka'anā'anā (HTA Chief Brand Officer), Jennifer Chun (DBEDT Director of Tourism Research), and Jadie Goo (HTA, Senior Brand Manager).

HTA and Anthology Research would like to acknowledge and thank the following local associations and organizations for distributing invitations to complete the survey to their membership and encouraging participation in this study: Chamber of Commerce of Hawai'i, Activities & Attractions Association of Hawai'i, Hawai'i Restaurant Association, Retail Merchants of Hawai'i, Hawai'i Food Industry Association, Kohala Coast Resort Association, Native Hawaiian Hospitality Association, Sustainable Tourism Association of Hawai'i, Hawai'i Island Chamber of Commerce, Kaua'i Chamber of Commerce, Moloka'i Chamber of Commerce, Hawai'i Visitors and Convention Bureau, Honolulu Japanese Chamber of Commerce, and Japanese Chamber of Commerce & Industry of Hawai'i.

EXECUTIVE SUMMARY

As Hawai'i's economy continues to recover from the COVID-19 pandemic, the visitor industry and all the related sectors that support and benefit from it will require a workforce that is well-equipped with the skills to be successful. Hawai'i's unique history, culture and environment draw visitors from around the world, but it is the people they encounter while in the islands that have the greatest impact on shaping their experience. Thus, the workforce is essential to delivering on the promises of the brand of Hawai'i.

Roles in the visitor industry workforce in Hawai'i are incredibly varied and offer advancement opportunities that can enable residents to build a career and support their families. However, the industry also must recognize that in order to attract talent, perceptions of the tourism sector must improve.

This research shows that there is great opportunity for developing the skills of the current workforce, especially in numerous soft skills areas. Visitor industry businesses are overwhelmingly in need of workers - now and in the future - who have the appropriate soft skills on which the employer can build. In many cases, employers would prefer to hire individuals who bring nothing more than the right attitude and ability to communicate and work together in a team environment. Employers can train the job-specific skills and convey the company-specific knowledge for the employee to be successful.

Skills development in the areas of customer service, workplace awareness and Hawaiian culture were identified in this study as priority areas of need for the workforce. With the increased integration of technology, the development of digital skills for current and future workers will be essential and, along with it, an increased appreciation for the value of interpersonal communications and leadership skills.

Building and further developing connections between the education system and visitor industry businesses will be critical for both enticing students to consider a career in tourism, as well as ensuring they have the right skills, knowledge, and attitude to be successful. Internships are a key component of that connection, but efforts should also include less structured engagement to raise the profile of the industry among future members of the workforce.

Hawai'i's visitor industry employers are eager for new programs, information on current offerings, and connections to other resources that will deliver incremental improvements in the skills and knowledge of their workforce, now and into the future.

KEY FINDINGS

- **Hawai'i's visitor industry is not perceived well as an employer, even among businesses.**

The visitor industry suffers from perceptions among both employers and residents that it does not provide value to the workforce. There is an opportunity to improve perception of the industry in numerous categories.

Percent Rating the Hawai'i Visitor Industry "Excellent"		
	Employers	Residents
As offering opportunities to meet individuals from diverse cultures and backgrounds	43%	34%
As a desirable industry in which to work	16%	16%
As presenting opportunities for career advancement	12%	12%
As offering competitive wages	11%	11%
As offering generous benefits	8%	11%
As offering significant training programs	8%	11%

- **Recruitment challenges are expected to remain into the future, so employers are working hard to retain and provide advancement opportunities for current employees.**

- **Recruitment of new employees** - Employers are struggling to recruit new employees at all levels, with difficulty increasing with the level of the employee's role.

- Percentage of employers that indicate it is "very difficult" to recruit for each role

- 39% - Entry level
 - 51% - Supervisor
 - 56% - Middle management
 - 62% - Senior management

- **Retention of Existing Employees** - More than half of employers report difficulty in retaining entry level, supervisor and middle management employees. Employers are going to great lengths to retain employees, including investing in their own training and development to provide career paths within their organization.

- There is a concern among some employers that an aging workforce in select roles (e.g., housekeeping) presents a significant threat to their long term ability to serve guests.

- **Current Needs: Managers** - According to the employers surveyed, management level employees are the most needed today in visitor industry organizations, as well as anticipated to be the most needed role in the next five years. Employers are reporting a

significant need for skills development for managers, as many are unprepared for this role.

- **Skills Needed - Managers:** supervising, team building, conflict resolution, communications, time management
- **Future Demand for Employees** - There is high anticipated demand over the next 3-5 years for all types of roles in the visitor industry, with more than half of all employers surveyed indicating very or somewhat strong demand. Entry-level employees will be most needed, with 82% of employers indicating demand.
 - **Skills Needed - Entry Level:** basic skills, soft skills, work ethic, interpersonal communications, professionalism in hospitality
- **Skills Assessment - Current Applicants**
According to employers surveyed, only 4% of recent applicants possessed all of the necessary requirements for the typical posted job.

Areas of Opportunity for Skills Development Among Recent Job Candidates (totally lacking + somewhat lacking)	
30%	Applicants lacked required basic skills (e.g., reading, writing, math)
42%	Applicants lacked required digital skills (e.g., basic computer use, word processing, basic software proficiency)
52%	Applicants lacked required soft / interpersonal skills (e.g., positive attitude, communication, customer service, cultural awareness / sense of place)
60%	Applicants lacked required job-specific occupational skills (e.g., food handling, commercial driving, housekeeping, bookkeeping, sales)
67%	Applicants lacked required organizational and management skills (e.g., time management, supervising employees)
73%	Applicants lacked required Hawai'i tourism-specific knowledge (e.g., Hawaiian culture, revenue management, how the industry works, distribution systems)

- **Skills Needed** - Through both the survey results and findings from the executive research interviews, further development of soft skills is a resounding need in the industry, today and into the future. Soft skills training is seen by many as an area that can and should be cultivated separately from on-the-job training—preferably before a job is acquired. Most employers are willing—and many, in fact, prefer—to teach the job-specific skills that employees need to be successful in their roles.

- **Specific Topics for Workforce Development** - The following topics for workforce development were identified in the survey and explored further in the personal interviews. They are presented in order of priority by numbered category.
 - 1. Customer / Guest service**
 - Understanding customer needs
 - Adapting to generational / cultural differences
 - Problem solving
 - Interpersonal communications
 - 2. Workplace awareness**
 - Work ethic
 - Workplace etiquette
 - Sexual harassment
 - Diversity, Equity & Inclusion
 - Safety / Compliance
 - 3. Hawaiian culture**
 - Hawaiian hospitality
 - History
 - Place names
 - Storytelling
 - 'Ōlelo Hawai'i (pronunciation)
 - 4. Digital / Computer Skills**
 - Basic computer use
 - Office 365
 - Revenue management analytics
 - Tracking / Forecasting trends
 - 5. Communication**
 - Interpersonal communications
 - Presentations
 - Storytelling
 - Professionalism in communicating
 - 6. Interpersonal / Social skills**
 - Teamwork / Team building
 - Interviewing basics
 - 7. Management / Leadership Training**
 - What is means to be a leader
 - Showing empathy
 - Conflict resolution
 - Building a team
 - Managing in a remote work environment
 - Business of Hawai'i tourism

- **Employer-Provided Job Training and Development** - The survey findings identified the top five training programs that employers currently offered or would like to offer their employees.

Employer Training Programs - Top Five			
Currently Offered by Employers	Available to ALL Employees	Available Only to SELECT Employees	Not Available, but Would Like to Offer
1. Directed on-the-job training (91%)	1. Directed on-the-job training (76%)	1. Leadership training (45%)	1. Hawaiian culture training (24%)
2. Employee orientation / onboarding (83%)	2. Employee orientation / onboarding (73%)	2. Operational / Technical training (42%)	2. Ethics (T-17%)
3. Operational / Technical training (81%)	3. Occupational safety / health (59%)	3. Market / Industry trends (35%)	3. Anti-bias, Diversity & Inclusion training (T-17%)
4. Compliance training (76%)	4. Harassment / Discrimination Prevention (54%)	4. Mentorship program (T-30%)	4. Market / Industry trends (T-17%)
5. Customer service training (75%)	5. Sexual harassment prevention (53%)	5. Soft skills training (T-30%)	5. Sustainability and green practices (T-17%)

- **Dedicated Budget**
 - **Current Budget** - Overall, a little less than half (45%) of the businesses polled allocate a portion of their budget each year for employee training and development. The likelihood of allocating funds for these types of programs increases as companies grow in size, topping out at 80% among large employers (100+ employees).
 - **Budget Forecast** - Overall, 39% of the businesses anticipates increasing their employee training budget over the course of the next two years while 43% anticipates no change in this area. Just one percent predicts a decline in the amount they spend on employee training.
- **Investment in Long-Term Career Development & Retention** - Half (54%) indicate that the business they represent makes investments in their staff as far as career development and employee retention were concerned. The data shows that such capital outlays are usually more likely to occur as companies grow in size.
 - **Obstacles** - Nearly two-thirds (60%) of employers indicate they are simply too short-staffed at the moment to devote resources in this area. Ranking a distant second were the 30% who feel that the lack of available funding was a primary deterrent. Rounding out the top three reasons were the 17% who said training is difficult due to pandemic restrictions.

- **Infrastructure for Virtual Training** - Overall, 79% of the businesses responding to this question have the capability to offer virtual training sessions to at least a portion, if not to all, of their employees. Forty-three percent believe they can conduct virtual training for all of their employees while 36% say this is feasible for at least some of their staff members.
 - In discussions with employers, there are mixed feelings about utilizing a virtual format for training and development. For most topics related to soft skills development, the consensus is that in-person training is needed. For compliance training and other similar topics, online courses are considered sufficient.
 - As expected, access by sector to virtual training infrastructure is lowest among restaurants (49% no access) and retail (35% no access).

- **Internships / Apprenticeships** - Overall, 38% of the businesses say they offer internships to students interested in the visitor industry. One in four (24%) has an apprenticeship program that is currently in place. Combined, 41% of the businesses offer a combination of an internship and/or apprenticeship program.
 - Only a third (33%) of employers were aware prior to the survey that post-secondary hospitality programs usually require students to participate in an internship as a requirement of graduation.

- **Awareness of Select Existing Programs** - The results from the study reveal an opportunity for raising awareness among employers of the workforce training and development programs tested, as there is significant interest in participating in such programs.

Employer Awareness and Interest in Existing Programs		
	Aided Awareness	Interest in Program
Native Hawaiian Hospitality Association (NaHHA) Cultural Training	43%	68%
Hawai'i AgriTourism Initiative	32%	61%
Sustainable Tourism Management with the Sustainable Tourism Association of Hawai'i	32%	57%
Campaign for a Safer Community with Ho'ōla Nā Pua	25%	57%
Customer Service In Hawai'i Training Program <ul style="list-style-type: none"> ● Certificate of Professional Development ● Certificate for Hawai'i's Professional Tour Guides 	25%	54%
Hawai'i Department of Education's Career & Technical Education (CTE)	22%	50%
L.E.I. (Leadership, Exploration, Inspiration) Program	21%	47%
Certified Festival and Event Executive (CFEE) Program	20%	45%

- **Perceived Role of HTA in Workforce Development**

- When businesses are asked about the role they feel that HTA should play in terms of workforce development, suggestions such as the sponsoring of training and certification programs along with facilitating or offering internship and apprenticeship programs were the top responses.
- There is little consensus among employers about the role that HTA should play in workforce development efforts. Some say they look to HTA as a resource for receiving relevant industry information or hosting learning opportunities for leaders. Others feel workforce development is the responsibility of the businesses themselves.

RECOMMENDATIONS

1. **Position Hawai'i's visitor industry as a desirable choice for a career** – Both employers and residents alike do not see the industry as a desirable employer, despite the fact that there is significant need now and in the future for management level positions, in particular, to be filled. This offers an opportunity for the industry to highlight the value of a career in hospitality and provide a clear path for growth.

Messages

- Hawai'i's visitor industry workforce is as varied as the state's overall workforce; there are career opportunities in a wide variety of roles that are not typically associated with tourism (e.g., trades, operations, information technology, finance, analytics, etc.).
- There are significant opportunities for advancement in the visitor industry. For example, managers are in demand now and expected to remain in high demand in the coming years, presenting opportunities for growth.
- Many different types of roles are available for those with only basic level skills, as most employers provide directed on-the-job and other types of training.
- Working in the visitor industry is dynamic and offers flexibility, competitive compensation and unique benefits.

Potential Tactics

- Identify and empower "champions" of the visitor industry to help current and future workers understand the opportunities that exist for a career in the industry.
 - Share success stories, beginning in secondary school, of local residents who have achieved success in the industry.
 - Encourage current successful visitor industry employees to visit schools to share opportunities or participate in job fairs.
 - Assemble a working group of industry leaders to identify additional avenues for changing the perception of the industry as an employer.
 - Employ social media channels and/or social media influencers to share information with the next generation about a career in the visitor industry.
2. **Increase awareness of and access to existing programs** – Awareness is low among employers of existing training programs, presenting a significant opportunity for increasing participation. Employers are very interested in the types of programs offered or sponsored by HTA and are eager to learn about other training and development offered by others.

Considerations

- Employers indicate they frequently receive email communications from numerous industry entities and rely on the information provided. However, the volume of communications makes it difficult to keep track of specific opportunities, such as available workforce development programs.
- With only one-in-three employers currently aware that students in post-secondary hospitality programs are required to participate in an internship as a requirement for graduation and fewer than half currently offering such programs, there is an opportunity to strengthen the bridge between high school / college and employment.

Potential Tactics

- Create a special "section" within industry email newsletters to highlight timely opportunities specific to workforce development offerings. Alternatively, deliver a monthly special edition newsletter that focuses only on workforce development-related topics.
 - Create a centralized resource of available workforce development opportunities and resources for employers and employees.
 - Create a directory of third-party training providers and their areas of expertise for employers to easily identify partners for specific training needs.
 - Further develop connections between educational institutions (high schools, community colleges and 4-year colleges) and employers with the specific goal of increasing the number of students who participate in formal internships or informal worksite visits. Also, enable part-time job opportunities during summer to expose students to work in the industry.
3. **Support the current visitor industry workforce** - Ensure visitor industry employers have access to programs they need to equip their staff with the basic skills to do any job. There are no shortage of opportunities to help the current visitor industry workforce develop and hone the skills needed to be successful. Most employers would rather hire for attitude and maintain control over job-specific trainings, while they are open to outsourcing the more general skills building.

Considerations

- The cost of training programs, as well as compensation for employees to participate in training "on the clock" is a significant barrier for businesses.
- With current and anticipated staffing shortages, employers do not feel they are able to give employees the time to participate in training. Similarly, they feel that employees are less likely to do training on their own, outside of work hours.
- According to employers, employees who participate in trainings tend to be more successful when they are able to progressively build on the skills learned.

- Neighbor island employees are more receptive to training that is conducted by people from their community, as they can present information in a credible and relatable fashion.

Potential tactics

- Appeal to the legislature to allocate funding to support workforce development and training programs, providing support for businesses to pay their employees to participate.
- Implement consistent training programs, regardless of topic, that occur on a regular basis to reinforce lessons through practical application. Ongoing training should include progressive curricula that builds on skills over time.
- As part of any workforce development programs offered, incorporate a clear career pathway for employees to understand how the training could help them progress.
- To the extent possible and practicable, identify and cultivate trainers on each island to provide a familiar and relatable voice in training.

Priority Topics for Training

- Soft skills - Over half of businesses say that recent applicants lack soft skills, such as customer service, working with others, effective communication and embracing an overall positive attitude.
- Computer skills - Beginning with basic training on using a computer and mobile device (e.g., tablet).
- Native Hawaiian culture - With one in four businesses not currently offering but would like to offer Hawaiian culture training, there is significant opportunity to connect local businesses with existing programs already offered by HTA and others.
- Leadership and management training - Supervising, team building, conflict resolution, communication, time management, etc.

4. **Prepare the next generation for a successful career in Hawai'i's visitor industry** - Begin now to cultivate the skills needed in the next generation of workforce by emphasizing mastery of basic skills with a special emphasis on interpersonal skills development.

Considerations

- With the increased adoption of technology for communication, especially during the pandemic, there is a sense among many employers that basic interpersonal communications skills are being lost.
- Employers indicate interest in mentoring members of the next generation, but do not have awareness of specific opportunities.
- Understanding of and appreciation for Native Hawaiian culture is an important element of an authentic experience, according to many employers.

Potential Tactics

- Identify and encourage young people with an aptitude for the visitor industry to help them understand the value of the industry as a career opportunity.
- Create mentorship program that connects students with mentors within companies that are part of the visitor industry.

Priority Topics for Next Generation Workforce

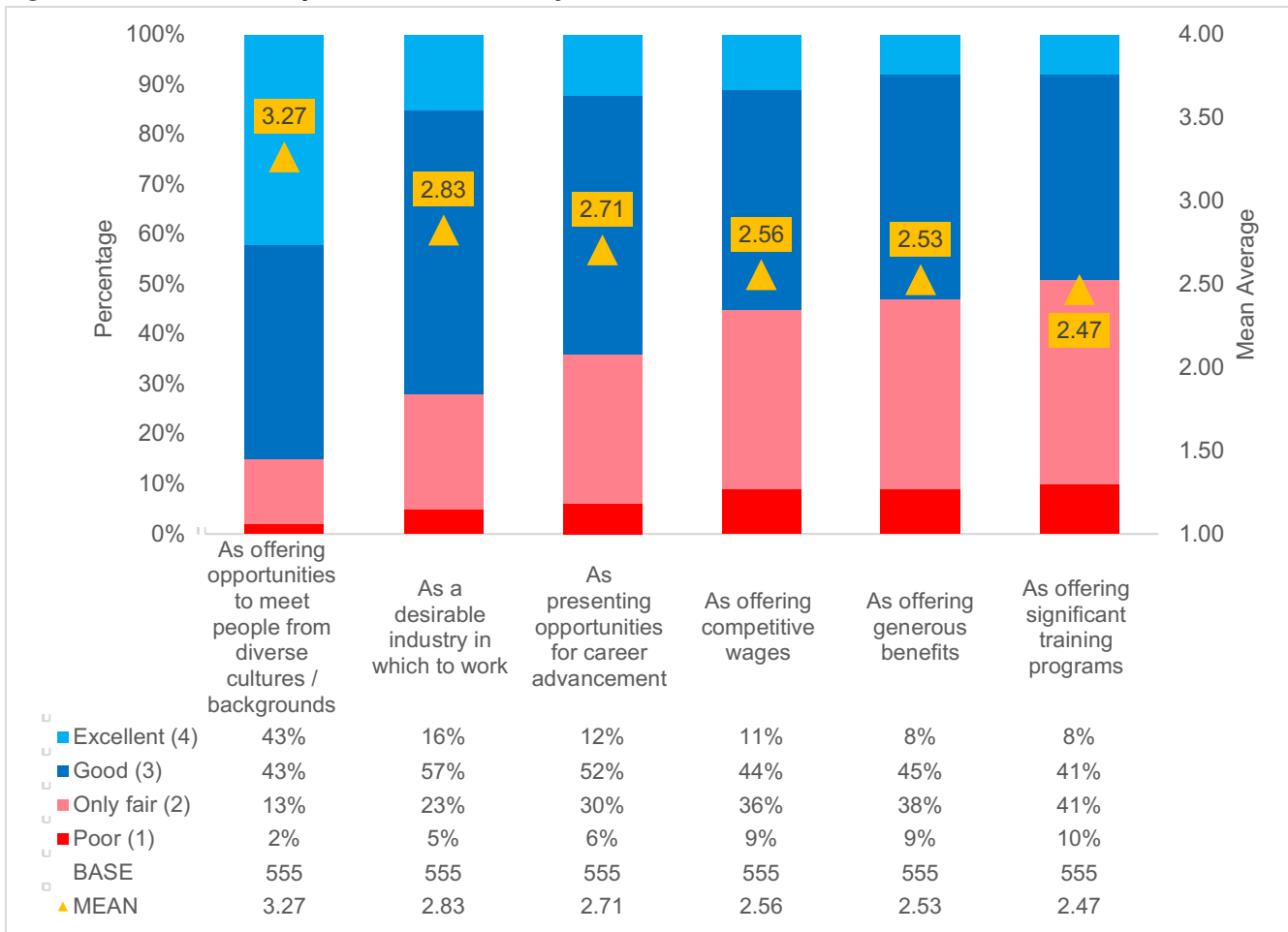
- Business of tourism
- Leadership and management training
- Technology
- Native Hawaiian history and culture

1. PERCEPTIONS OF THE VISITOR INDUSTRY AS AN EMPLOYER

BUSINESS PERSPECTIVES - VISITOR INDUSTRY - GENERAL PERCEPTIONS

Business representatives who took part in the research were asked to rate the local visitor industry in the following areas. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results a mean or average score was also computed. The higher the mean score (closer to 4.00/ "Excellent") the more positive the overall perception of the visitor industry is in each area.

Figure 1.1. Business Perception of Visitor Industry



Using the midpoint in a four-point rating scale of 2.50 as a cutoff between a net positive (excellent/ good) or negative (only fair/ poor) perception we find that three of the six attributes rose above this threshold signifying a net positive perception. The remaining three were slightly above or just below this borderline.

The visitor industry is viewed positively when it comes to offering opportunities to meet individuals from diverse cultures and backgrounds (3.27 mean score), being an industry that is desirable to work in (2.83 mean score), as well as presenting opportunities for career advancement (2.71 mean score).

"Part of travel and tourism is the ability to experience the world. I mean this is one of the reasons why people choose this industry. So giving them the opportunity to be able to do that I think that would allow us to be more competitive and bring people into our industry as well as sustain them." Statewide Accommodation Interviewee

"[...] I think that the industry has a PR issue. [...] I think it needs to create a better image for itself so that people will want to be a part of it." Statewide Tour Interviewee

"You know I only hear you know it's a minimum wage job. It's not." Statewide Restaurant/ Professional Services Interviewees

"I wish there were more, a stronger understanding of the industry. I think there are a lot of misperceptions and stereotypes that we need to work through to really understand what those opportunities are and what they could mean to our local families, our local kids, our local students." O'ahu Accommodation Interviewee

"Revenue management, marketing, public relations, social media, things that people gravitate towards in careers, but don't necessarily consider them as part of hospitality." O'ahu Accommodation Interviewee

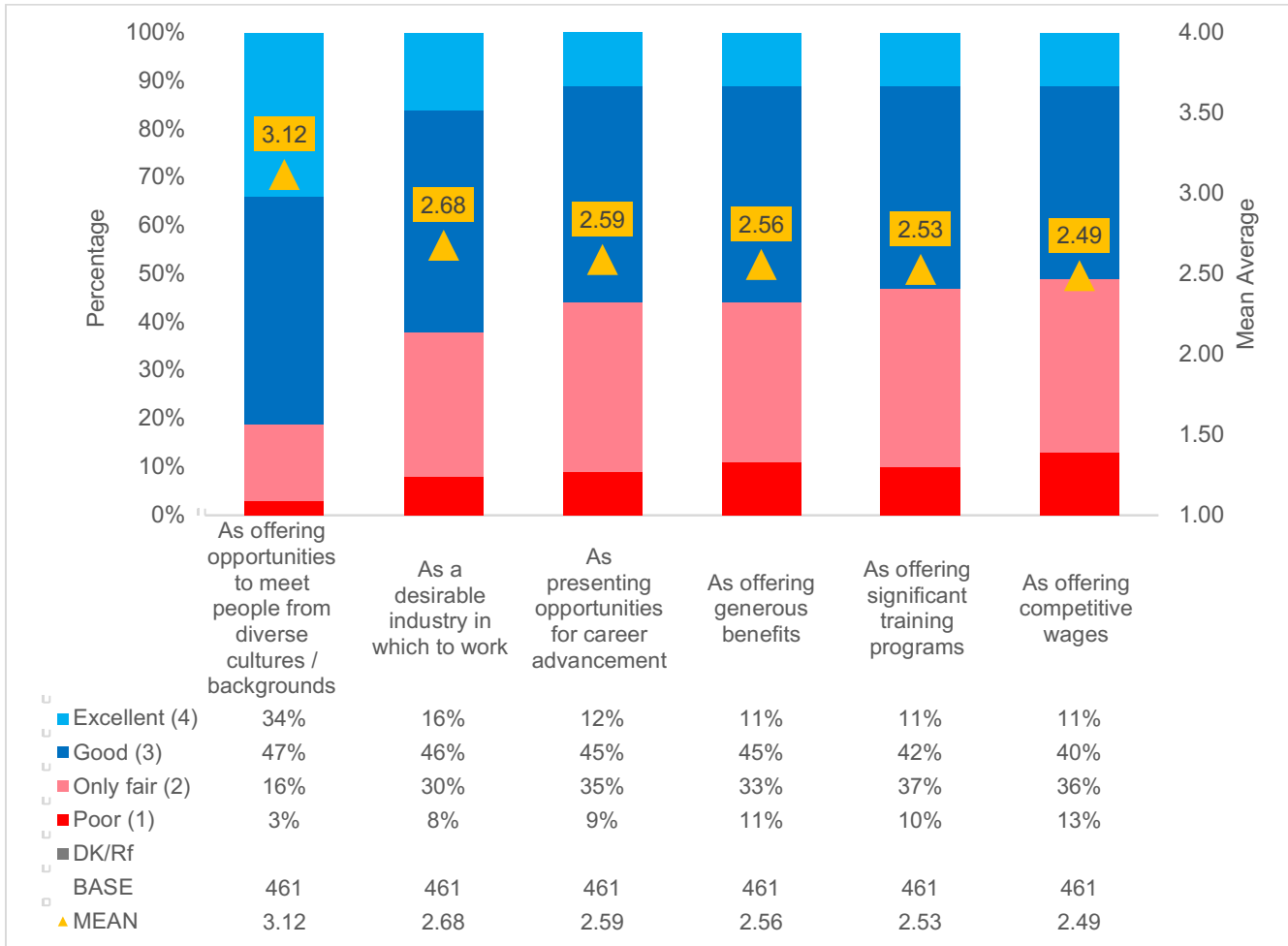
"So it's not that dead end job that people are creating this oh I don't want to be a housekeeper, I don't want to be a room attendant. How do we transform those jobs to bring people into those jobs so that they can then move their way through and progress like as a stepping stone." Statewide Accommodation Interviewee

"So I think that I would say some of our more blue collar work that is respectable, unionized, has great benefits I think it may get overlooked too much." Statewide Transportation Interviewee

GENERAL POPULATION PERSPECTIVES - OMNIBUS FINDINGS

Those taking part in the Omnibus study of Hawai'i residents were presented with six areas related to local employment opportunities and then asked to rate the visitor industry as far as their performance in each area was concerned. They were instructed to quantify their views using a standard four-point rating scale highlighted in the table below. In addition to the percent result a mean or average score was also computed. The higher the mean score (closer to 4.00) the more positive the overall perception.

Figure 1.2. General Population Perception of Visitor Industry



Using the midpoint of 2.50 as the cutoff between a net positive/ negative score we see the results split fairly evenly with the lone exception of offering opportunities to meet people from diverse cultures and backgrounds (3.12).

Each of the other five areas tested all received mean scores that fell very closely to the 2.50 midpoint signifying a near equal number of net positive and negative perceptions for each of the other attributes.

Overall, when looking at mean score, both employers and residents rate the various attributes of the visitor industry similarly. However, when we look at top box (excellent rating) scores, we see a slight disconnect in the perceptions of employers and residents in the areas of training programs and benefits. Conversely, employers tend to believe more strongly than residents that the industry offers opportunities to meet people from diverse cultures.

Figure 1.3. Mean Score Comparison - Employer vs. General Population

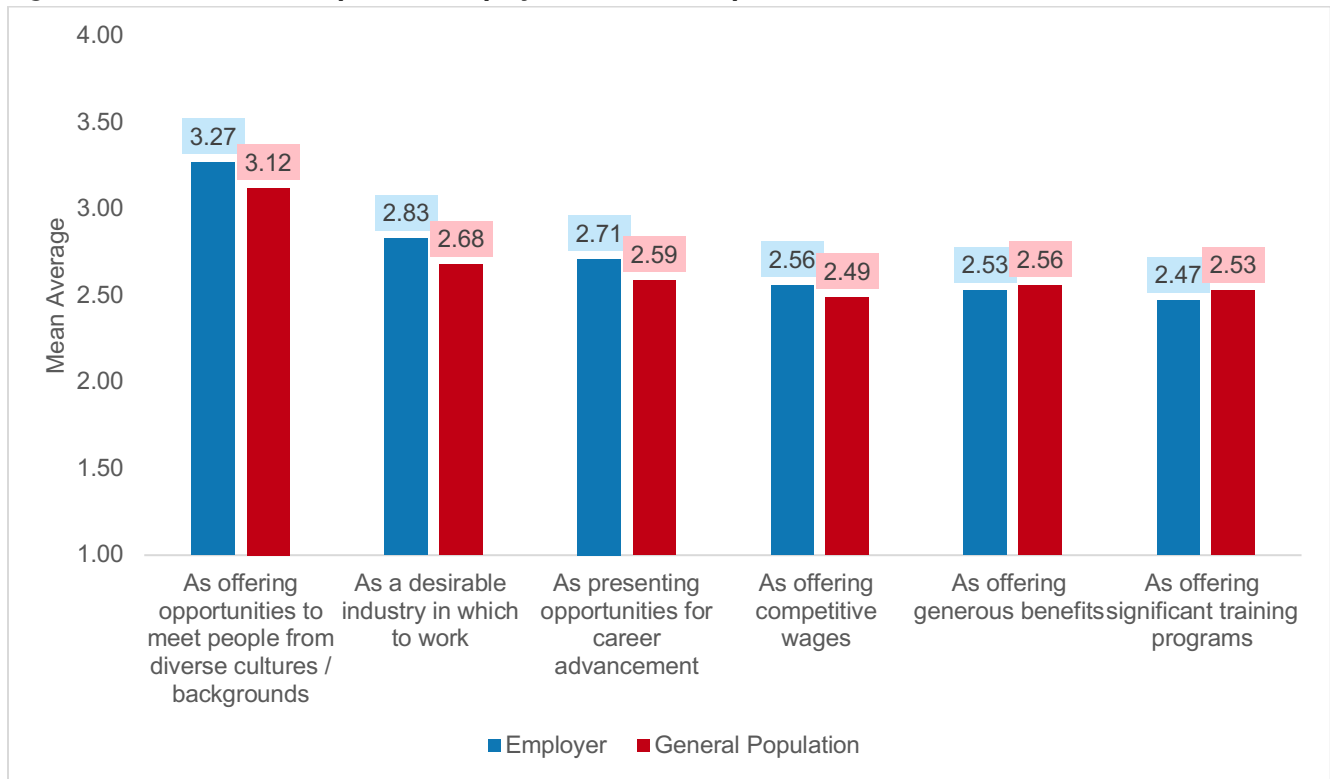
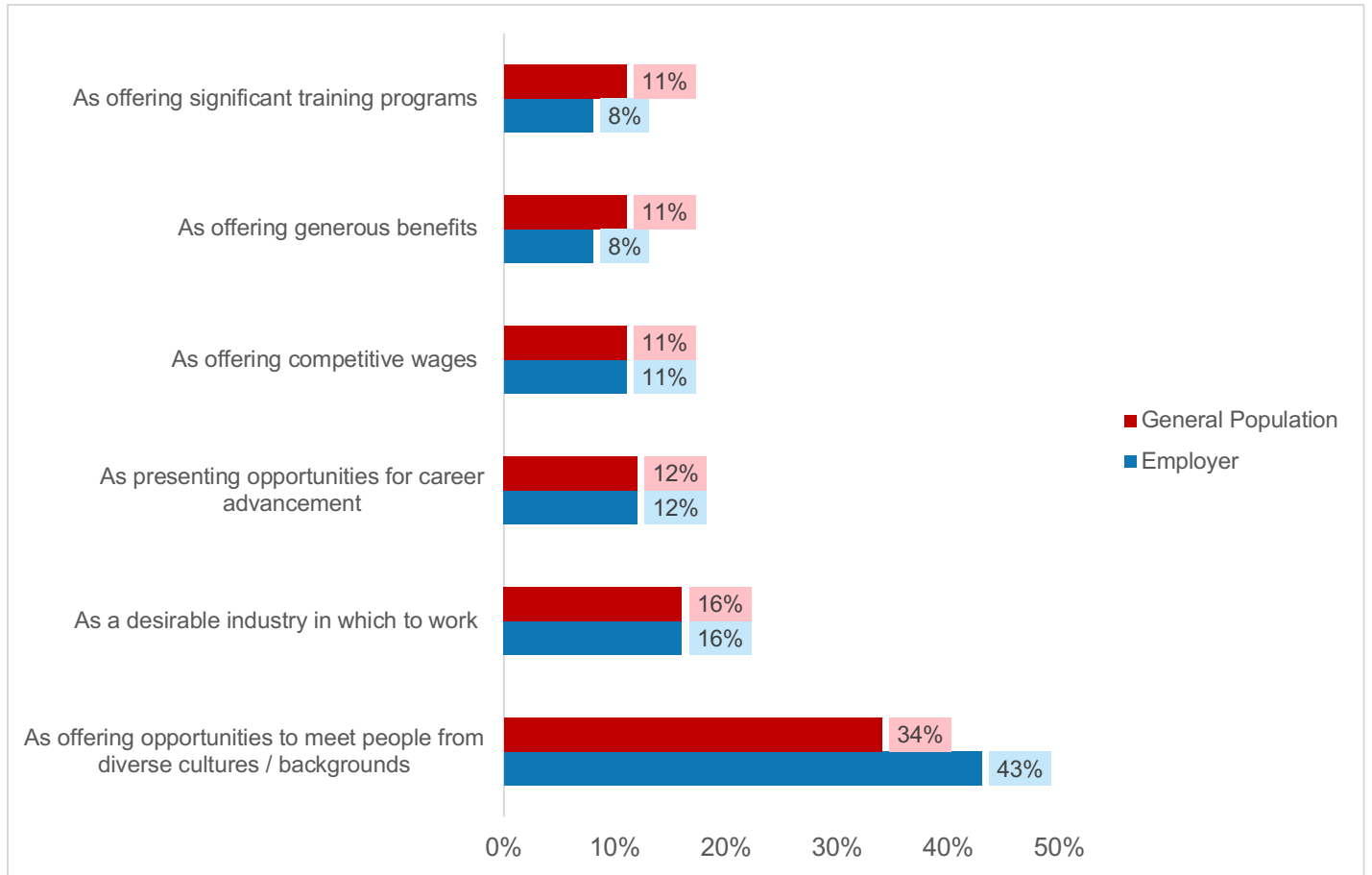


Figure 1.4. TopBox (Excellent) Score Comparison - Employer vs. General Population



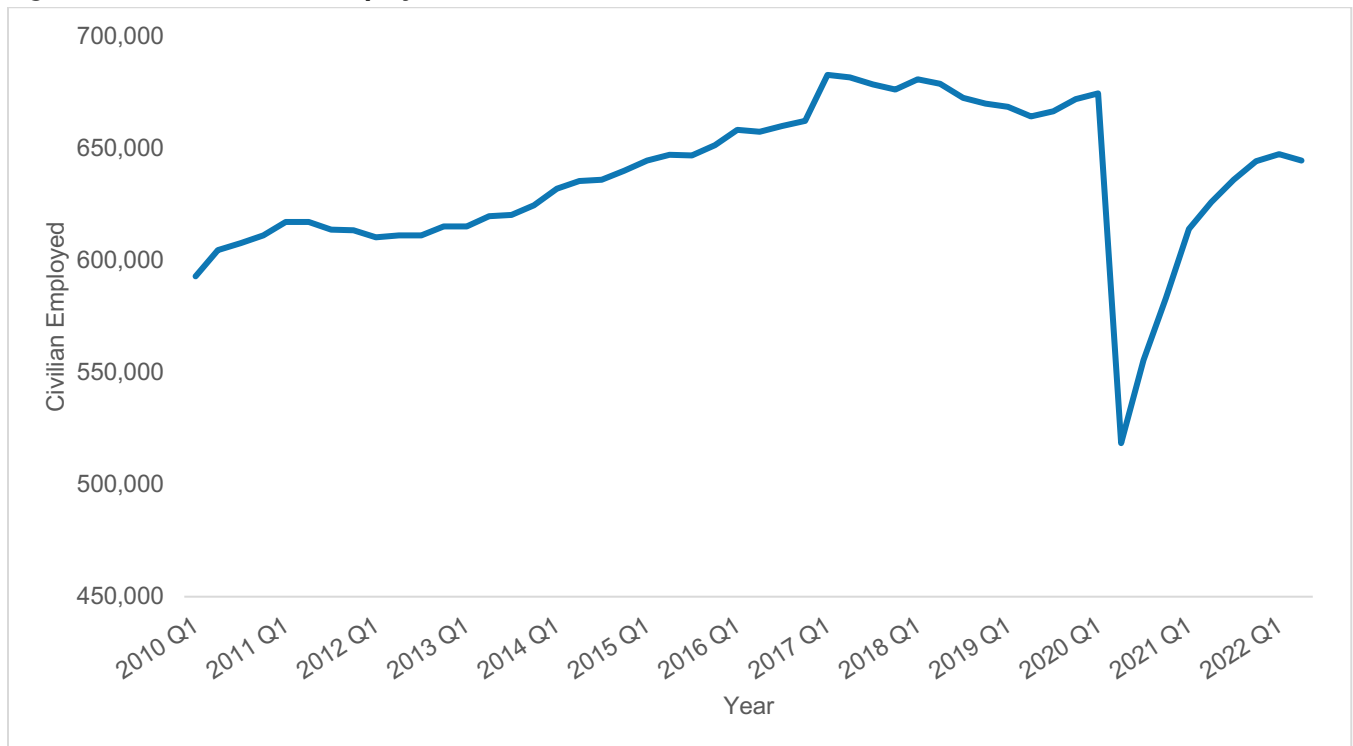
2. STATE OF THE VISITOR INDUSTRY WORKFORCE

HAWAI'I LABOR MARKET - SECONDARY RESEARCH

Employment in the State

The State of Hawai'i's Department of Business and Economic Development & Tourism (DBEDT) report Hawai'i's current labor market as positive. As of the first quarter of 2022, non-agricultural payroll jobs increased 7.3% from first quarter of 2021. Recording the highest increase in jobs was Accommodations, which added 14,500 jobs, a 71.7% increase from the same quarter of 2021. Visitor industry related sectors that followed were Arts, Entertainment & Recreation (up 28.9%), Food Services & Drinking Places (up 21.2%), Transportation, Warehousing & Utilities (up 17.4%), Retail Trade (up 5.2%), Manufacturing (up 5.2%) and Professional & Business Services (up 3.8%).

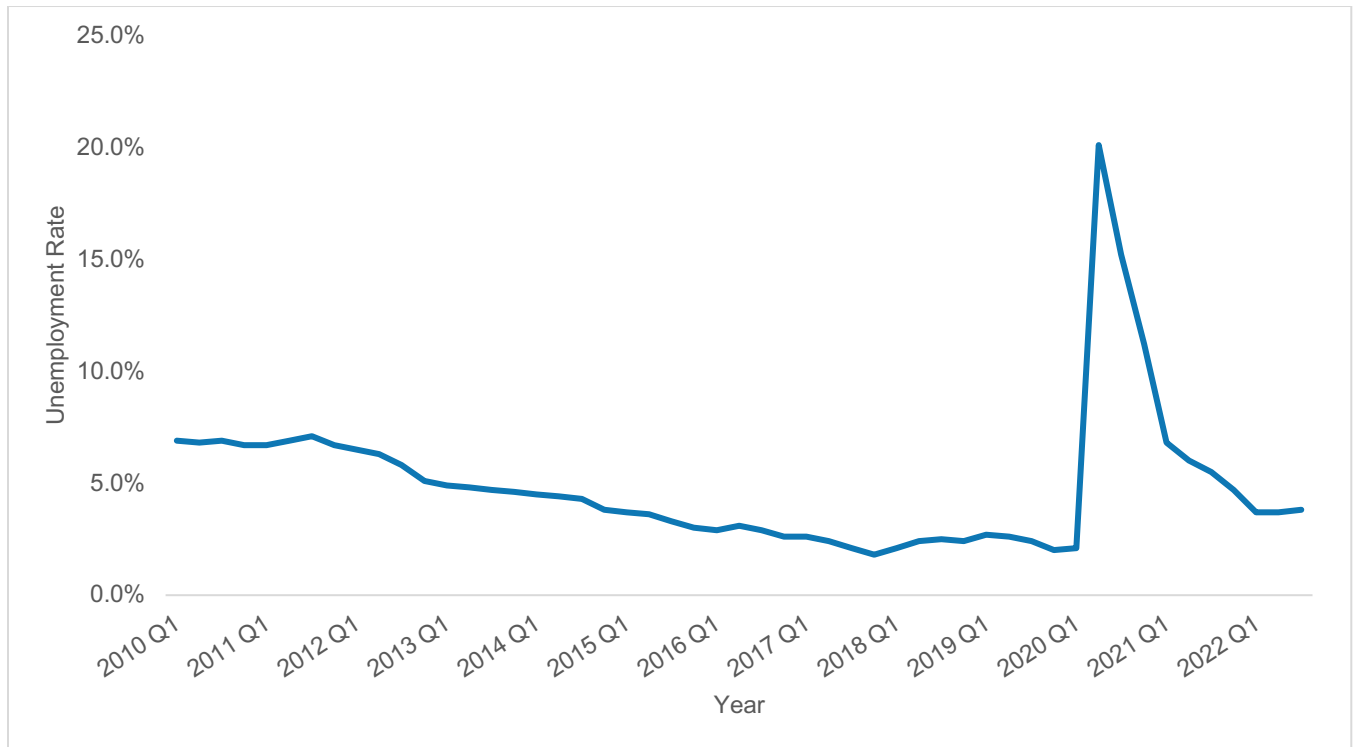
Figure 2.1. Hawai'i Civilian Employed



Source: State of Hawai'i, Department of Business, Economic Development & Tourism

Hawai'i's unemployment rate for the same period was 3.8%, down from 4.7% in Q4 2021, but still higher than Hawai'i's average unemployment rate of 2.5% between years 2017 to 2019.

Figure 2.2. Hawai'i Unemployment Rate



Source: State of Hawai'i, Department of Business, Economic Development & Tourism

Labor Participation in Hawai'i

When examining Hawai'i's current labor participation rates, as of July 2022 the state saw 60.8% participation, up only 0.5 percentage points from July 2021. DBEDT forecasts non-agricultural payroll jobs to increase by 4.5% in 2022 and 3.2% in 2023. By first quarter of 2023, the employment statewide is expected to expand to 667,340 total jobs; a 10.3% increase from same quarter of 2021.

Industry & Job Growth in the State

The State of Hawai'i's Department of Labor and Industrial Relations (DLIR) published a report on Employment Forecasts for the Short-Term Future in March 2022. The report forecasted industry and occupational job growth using data from a variety of State and Federal sources. Industries with the highest rate of job growth from quarter one 2021 to the same quarter in 2023 is expected to be Accommodations, leading with 81.9% job growth. Following growth industries are Arts, Entertainment, and Recreation (34.1%), Transportation and Warehousing (26.9%) and Food Services and Drinking Places (24.4%)—all of which are related to the visitor industry.

Table 2.1. Hawai'i Industry Employment and Growth, 2021 Q1-2023 Q1

Industry	Employment		Growth (2021-2023)	
	2021 Q1	2023 Q1	Number	Percent
Accommodation	20,320	36,960	16,640	81.9%
Arts, Entertainment, and Recreation	7,590	10,190	2,590	34.1%
Transportation and Warehousing	22,740	28,860	6,110	26.9%
Food Services and Drinking Places	49,790	61,950	12,170	24.4%
Admin, Support, Waste Management, Remediation	32,530	36,550	4,020	12.4%
Educational Services	51,050	57,280	6,230	12.2%
Total, All Industries	604,820	667,340	62,520	10.3%
Real Estate and Rental and Leasing	10,360	11,350	990	9.5%
Other Services	21,930	23,580	1,650	7.5%
Retail Trade	61,260	65,630	4,370	7.1%
Self Employed Workers	46,610	49,420	2,810	6.0%
Construction	36,320	38,080	1,760	4.8%
Management of Companies and Enterprises	8,050	8,430	380	4.7%
Manufacturing	11,510	11,800	280	2.5%
Wholesale Trade	15,920	16,290	370	2.3%
Health Care and Social Assistance	74,820	76,340	1,520	2.0%
Mining	240	240	0	1.3%
Government	74,280	75,130	850	1.2%
Professional, Scientific, Technical Services	24,560	24,830	270	1.1%
Finance and Insurance	15,840	15,710	-140	-0.9%
Information	8,020	7,930	-90	-1.1%
Agriculture, Forestry, Fishing and Hunting	7,480	7,350	-130	-1.8%
Utilities	3,600	3,460	-140	-3.8%

Source: State of Hawai'i Department of Labor and Industrial Relations, March 2022

The same report indicates that DLIR expects Hawai'i jobs to recover in the short term for all the following major occupational groups (see chart). A variety of visitor industry-related occupations exceed the 20% growth rate, leading with hotel desk clerks (72.5%), housekeeping (48%) and vehicle drivers (43.6%).

Table 2.2. Hawai'i Occupations with Most Job Creation, 2021 Q1-2023 Q1

	2023 Q1 Emp	New Jobs Created	Growth Rate
<i>Maids & Housekeeping Cleaners</i>	12,800	4,150	48.0%
<i>Waiters & Waitresses</i>	16,160	3,960	32.5%
<i>Fast Food & Counter Workers</i>	18,160	3,060	20.3%
<i>Restaurant Cooks</i>	9,750	2,640	37.2%
<i>Retail Salespersons</i>	22,020	2,420	12.4%
<i>Supervisors of Food Prep & Serving Workers</i>	6,410	1,280	24.9%
<i>Food Preparation Workers</i>	8,870	1,280	16.8%
<i>Security Guards</i>	9,040	1,220	15.6%
<i>General Maintenance & Repair Workers</i>	7,110	1,170	19.8%
<i>Dining Room, Cafeteria Attendants, Bar Help</i>	4,020	1,170	41.2%
<i>Hotel, Motel, Resort Desk Clerks</i>	2,680	1,130	72.5%
<i>Janitors & Cleaners</i>	11,630	1,100	10.4%
<i>Landscaping & Groundskeeping Workers</i>	9,430	990	11.8%
<i>General & Operations Managers</i>	9,500	830	9.6%
<i>Bartenders</i>	2,890	800	38.6%
<i>Passenger Vehicle Drivers</i>	2,560	780	43.6%
<i>Dishwashers</i>	3,070	740	32.0%
<i>Cashiers</i>	12,330	720	6.2%
<i>Hosts & Hostesses (Restaurant, Lounge, Coffee</i>	2,990	700	30.7%
<i>General Office Clerks</i>	12,710	690	5.8%

Source: State of Hawai'i Department of Labor and Industrial Relations, March 2022

Looking further ahead to forecasts through year 2028, we find many visitor-related occupations, whether as a primary or secondary industry, as a leading group for total annual openings or a positive growth rate.

Table 2.3. Hawai'i Projected Job Creation, Growth, and Openings by Occupation Group, 2018-2028

Occupation Group	2028 Employment	New Jobs Projected	Growth Rate	Total Annual Openings
Food Preparation & Serving Related	91,820	5,450	6.3%	16,030
Office & Administrative Support	89,280	-3,750	-4.0%	10,390
Sales & Related	67,680	-1,090	-1.6%	9,530
Management	56,410	2,310	4.3%	4,980
Education, Training, Library	49,890	2,010	4.2%	4,760
Transportation & Material Moving	47,020	2,230	5.0%	5,870
Building & Grounds Cleaning/ Maint	43,670	-610	-1.4%	5,680
Construction & Extraction	42,050	2,610	6.6%	4,710
Healthcare Practitioners & Tech	36,640	3,530	10.7%	2,270
Business & Financial Operations	33,590	1,730	5.4%	3,270
Personal Care & Service	31,650	3,130	10.9%	4,950
Installation, Maintenance, Repair	28,040	750	2.7%	2,780
Healthcare Support	24,720	3,990	19.2%	2,970
Protective Service	20,200	-1,010	-4.8%	2,180
Production	16,040	-210	-1.2%	1,930
Arts, Design, Entert., Sports, Media	12,890	90	0.7%	1,470
Community & Social Service	12,210	1,090	9.7%	1,350
Computer & Mathematical	11,620	730	6.7%	900
Architecture & Engineering	10,820	320	2.9%	870
Life, Physical, Social Science	7,600	360	5.0%	780
Farming, Fishing, Forestry	6,340	290	5.0%	1,030
Legal	4,960	120	2.5%	340

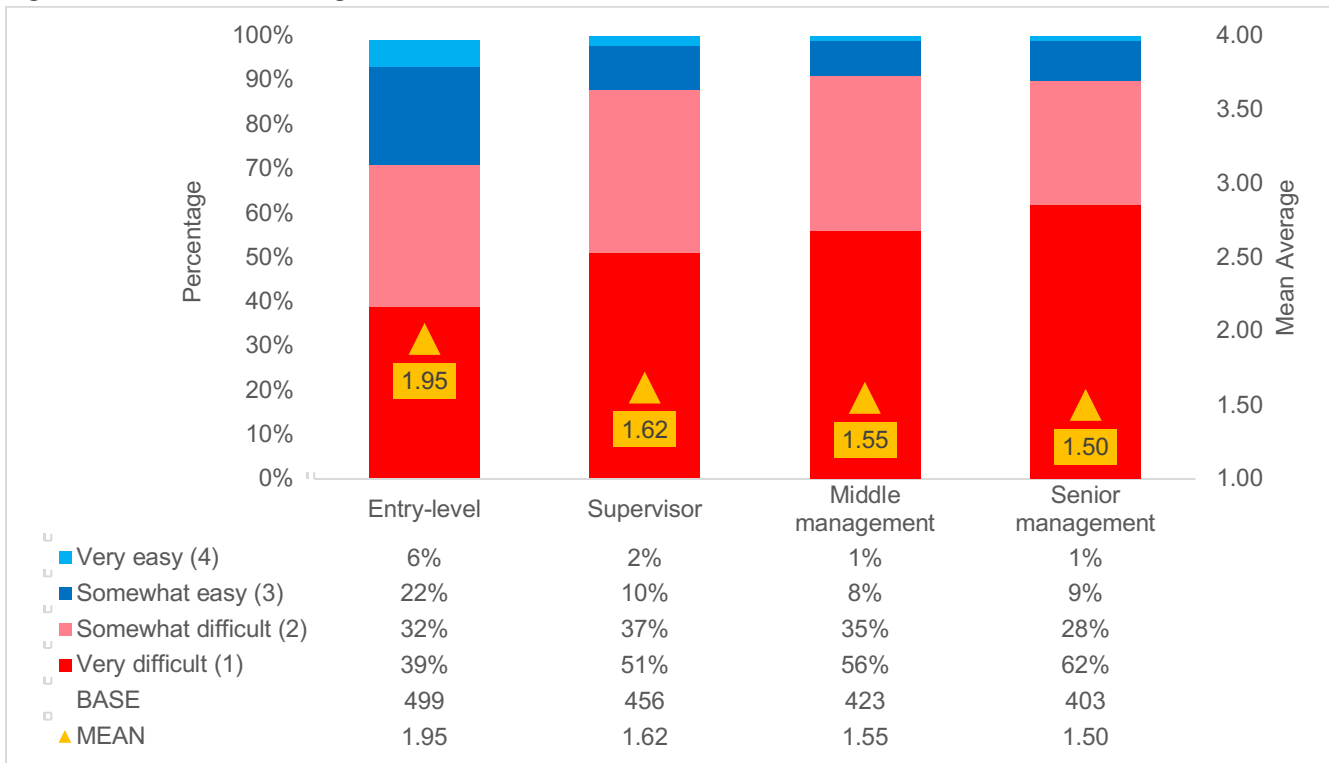
Source: State of Hawai'i Department of Labor and Industrial Relations, March 2022

AVAILABLE WORKFORCE

Ease of Recruitment of New Candidates

Each business in workforce needs assessment study was asked to rate the difficulty they have in recruiting new candidates for open positions at the following employee grade levels. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results a mean or average score was also computed. The lower the mean score (closer to 1.00/ "very difficult") the greater the difficulty they have in filling new positions at that specific employee grade level.

Figure 2.3. Ease of Recruiting New Job Candidates



The results from this section of the study clearly highlights the difficulty that businesses have in filling positions of all types. Once again, for a four-point ratings scale using a midpoint calculation of 2.50, we find that all of the mean scores fall well below this mark signifying acknowledged difficulties in filling a myriad of roles within their businesses. These general results also highlight the increased difficulty in recruiting positions as the level of expertise and experience needed rises.

As businesses look to fill positions, some hiring managers choose to prioritize attitude and potential for learning over job-specific experience and skills.

"I really tend to hire for attitude and someone that aligns with the vision of the property." O'ahu Accommodation Interviewee

"I think we need to be a little more creative. It doesn't necessarily mean that they already have the job skills when they apply. [...] We find, well I find it more valuable if they're a little more well rounded meaning they may come from a different industry other than hospitality and do very, very well because of the other experience that they have." O'ahu Accommodation Interviewee

"So bringing in you know new eyes that could maybe give us opportunities to learn and grow too that we weren't aware of because we've kind of been doing our thing the same way." Kaua'i Attraction Interviewee

"I think for non-management positions they main requirement really that we have is the attitude and the friendliness and willingness to help and serve that's really tops...The top priority in my opinion is really the attitude of that individual toward the guest of the hotel." O'ahu Accommodation Interviewee

There is a feeling among some employers that an exodus has occurred among potential candidates for visitor industry positions, driven by the COVID-19 pandemic and overall changes in attitude among young people about work.

"So I think that COVID pushed a lot of younger people sort of entry level management people over the fence and basically I think we will find as we go forward that there was a bit of brain drain went on during our closure as a state. So having said that and that's exasperated not only recruiting employees, but also reducing the turnover which is very expensive." O'ahu Attraction Interviewee

"You know I think people are trying to get other, chase other opportunities that will provide those flexibilities." O'ahu Manufacturing Interviewee

"In the hotel industry one of the biggest challenges they have right now is like in housekeeping and stuff all those people are retiring and again you don't have these young kids that want to go bust their ass." Statewide Restaurant/ Professional Services Interviewee

"Yeah we're having difficulty filling the leadership roles especially that middle like a supervisory role. People are I don't think willing to commit. [...] I don't know if they feel that there's something that they need to give to get there or maybe they're not seeing the benefits of it in growth, but that's a huge place that we're lacking." Statewide Transportation Interviewee

Other positions that employers indicate are hard to fill include many that are not traditionally thought of as part of the visitor industry, including finance, information technology, facilities management and maintenance.

"I will tell you that my understanding is that we are all short on finance leaders right now. All of us. [...] I think IT. I think most people are struggling a little bit to find the IT talent on their properties."
O'ahu Accommodation Interviewee

"We have the need for unskilled individuals who are able to assist us in our facilities maintenance, facilities management, cleaning, taking care of the building those positions are very hard for us to fill." O'ahu Attraction Interviewee

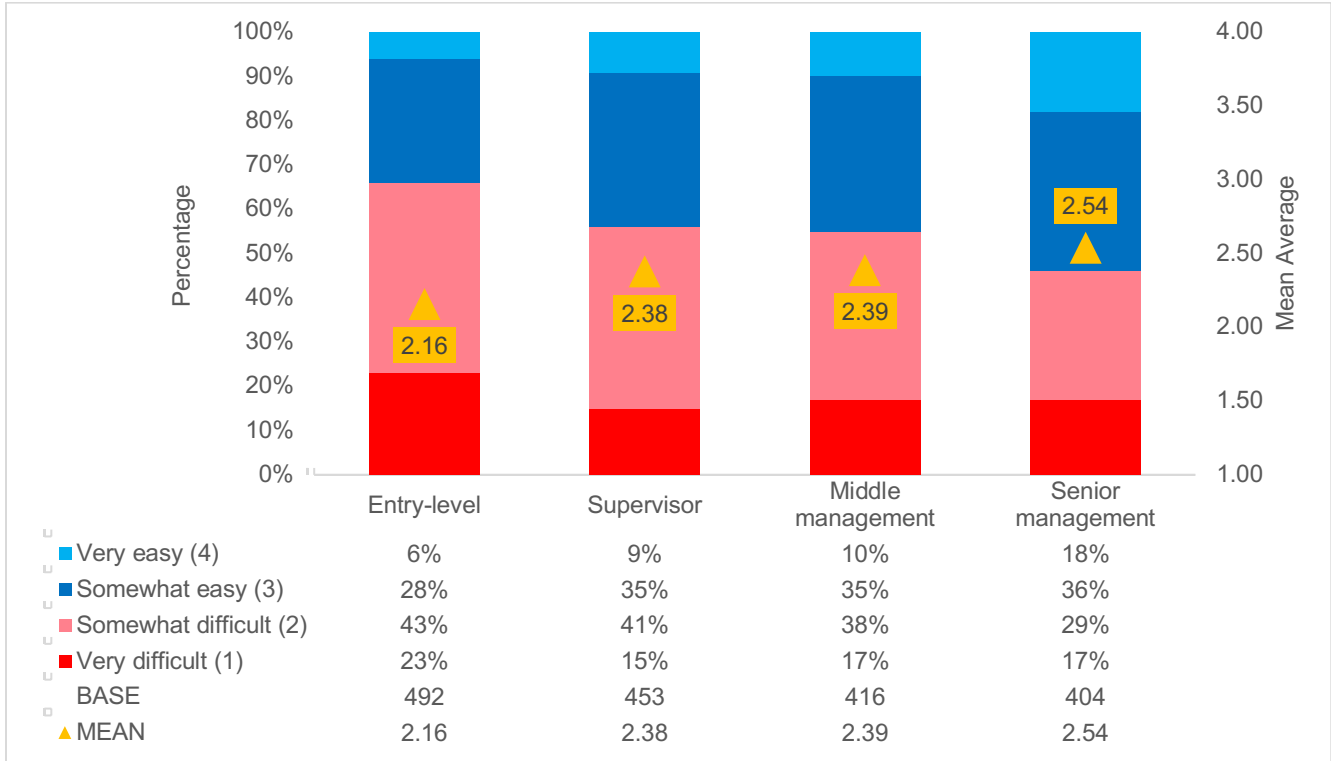
There is a concern among some visitor industry employers that an aging workforce in select roles presents a significant threat to the long-term ability to serve guests. This is compounded by the fact that as an island state, immigration is severely limited.

"There's no obvious replacement for I would guess the average housekeeping, housekeeper age in and across the entire industry not just with us is well north of 50 for a difficult job. Unlike other markets where in LA you have something like you know maybe Hispanic immigrants or in some markets you have Chinese immigrants there's no, there's no readily identifiable replacement."
Statewide Accommodation Interviewee

Ease of Workforce Retention

Each business was then asked to rate the level of difficulty they have in retaining employees from the same four workforce categories listed in the prior section. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results a mean or average score was also computed. The lower the mean score (closer to 1.00/ "very difficult") the greater the difficulty they have in retaining these types of employees.

Figure 2.4. Ease of Workforce Retention



The result from this section also highlights to a lesser extent, the difficulty businesses face in retaining good employees of various work levels. The mean scores indicate that the most difficult positions to retain are employees at entry-level positions. As workers make their way up the employment ladder retention becomes a bit easier though is still a challenge as none of the mean scores are able to clearly break free of the 2.50 midpoint.

As recruiting remains challenging, businesses are focusing efforts on retention.

“You know, what we want to do is we invest, which we work really hard to treat our labor force as good as we possibly can. In return, we want the loyalty that goes along with that.” O’ahu/Hawai’i Island Events Interviewee

"We don't necessarily have the financial means as some of the bigger giants to pay you know our skilled labor. So we have to come up with new ways to enhance staff loyalties." Statewide Events Interviewee

"Now at the non-skilled, entry level that's where we got the significant turnover rate. [...] And so our focus is trying to retain unskilled labor so we can develop them into skilled labor. It's a long term approach, but we think for our needs it's more that honestly it's more like we're interested in people who want to live here." O'ahu Attraction Interviewee

Retention efforts focus on providing development opportunities to grow staff into larger roles.

"We've tried to move some of those people up into middle management positions. As we grow, we have more and more of these people, and every one of them understands that they may need to train somebody to do the job. Because there's a sense of ownership in terms of people who work with us, they have no problem saying - okay, I'll teach this, I'll make sure they know what they're doing kind of." O'ahu/Hawai'i Island Events Interviewee

"So it's difficult to recruit so it becomes even more imperative that you try and retain your employees so that you can develop them from a dishwasher to a line cook to inventory to a cook I, cook II, sous chef, even executive chef. That takes a lot of time." O'ahu Attraction Interviewee

"Heck we've been trying to recruit hard and like we've had sous chef position posted since we reopened in January 2021. And we haven't been able to fill them. So we gave up on that nearly a year ago and found a couple of young kids that were really keen on it, saw it as an opportunity, and got well I just mentioned them to you. And they're moving up. KCC has been wonderful." O'ahu Attraction Interviewee

Most Needed Positions, Most Challenging to Fill

Business representatives were asked to identify the types of positions at their companies that were the most needed at this time and also the most challenging positions to fill. The top responses for each question are highlighted in the table below.

Table 2.4. Need / Challenge - Types of Positions

Most Needed n=554	Most Challenging to Fill n=555
13% Manager	15% Manager
11% Entry-level (unspecified)	10% Entry-level (unspecified)
10% Culinary staff/ back of the house	10% Transportation/ tour operators
9% Transportation/ tour operators	8% Culinary staff/ back of the house
9% Office/ administrative support	7% Sales
8% Sales	6% Housekeeping
8% Housekeeping	5% Front of the house
6% Marketing/ communications	5% Professional services
6% Front of the house	5% Everything
6% Front desk/ Receptionist	5% Front desk/ Receptionist
4% Tech support	5% Marketing/ communications
4% Landscaping/ maintenance	5% Office/ administrative support
4% Retail	

When these two lists are compared side-by-side we see many similarities in terms of need and difficulty in filling these positions. Top responses in both lists include manager-level positions, general entry-level positions, culinary staff, and transportation/ tour operator positions.

Much of the need for particular positions are driven by larger firms directly tied to the visitor industry, particularly when it comes to the need for culinary staff, housekeepers, and front of the house personnel.

Business representatives were asked what roles in their organization, in the next five years, they anticipate will represent the greatest needs within their organization. Once again, the top responses given are highlighted in the table below.

Table 2.5. Anticipated Roles Needed in Next 5 Years

	TOTAL
BASE	550
Manager	26%
Entry-level (unspecified)	12%
Transportation/ Tour operator	10%
Office/ Administrative support	8%
Sales	8%
Marketing/ communications	7%
General laborer	7%
Culinary/ back of the house	7%
Front of the house	7%
Housekeeping	6%
Senior-level positions	5%
Tech support	5%

Those taking part in the study anticipate the biggest need coming in the form of filling managerial positions within their organizations, chosen by 26%. Twelve percent identified entry-level positions as posing the greatest future need, while 10% feel that transportation and tour operator positions will have the greatest need in the next five years. Rounding out the top five were office and administrative support positions, followed by the need for sales staffing.

When it comes to the skill sets needed to be an effective manager, a number of employers believe there is an opportunity to better develop and prepare these individuals.

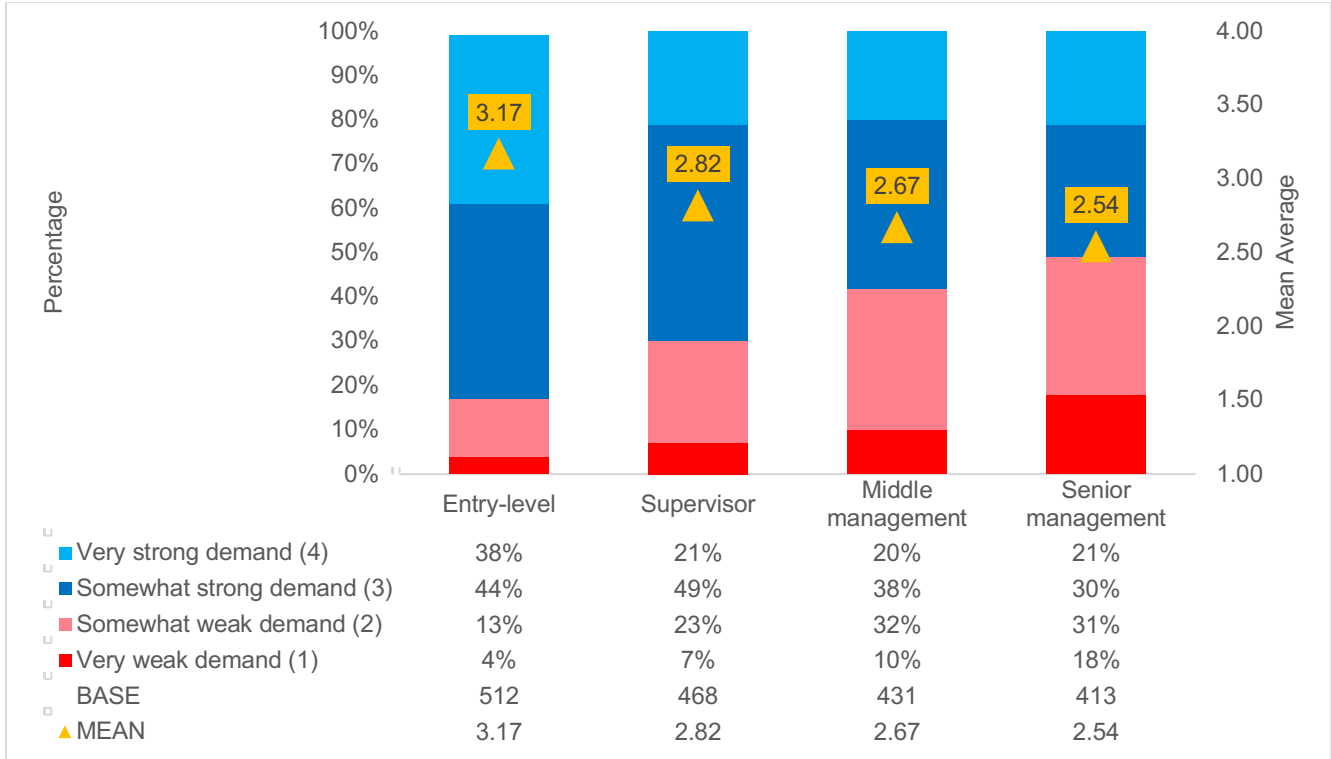
“I think some of our people have been put into management roles too soon. So they don't have the time management, the supervisory skills, and we're trying to catch up and teach them and have them learn on the job.” Kaua'i Manufacturing Interviewee

“Maybe not executives, but an entry level sales manager or a front office manager or assistant front desk manager what I'm seeing a lot of those people don't have the skill sets.” O'ahu Accommodation Interviewee

FUTURE DEMAND FOR EMPLOYEES

Each business was then asked to anticipate the demand for workers over the next three to five years. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results a mean or average score was also computed. The higher the mean score (closer to 4.00/ "very strong demand") the greater the demand for these types of workers in the coming years.

Figure 2.5. Anticipated Future Demand



The research shows the strongest demand for workers over the next three to five years will be in the area of entry-level staffing. Thirty-eight percent of the businesses polled believe there will be a strong, robust demand for these types of workers over the next three to five years. Another 44% anticipates somewhat strong demand for these types of positions. Of the remainder, 17% forecasts relatively weak demand at their firms for these types of workers. When these results are looked at in the aggregate they result in a mean or average score of 3.17 out of a possible 4.00, well above the 2.50 midpoint.

The level of very strong future demand for entry level employees increases with employer size. Among large employers (100+ employees), 56% indicate very strong demand for entry level roles. That percentage decreases to 43% among medium size business (20-99 employees) and bottoms out at 23% among employers in the micro category (1-4 employees).

Overall anticipated demand for supervisor level, middle management and senior management roles tends to be higher among large employers (100+ employees).

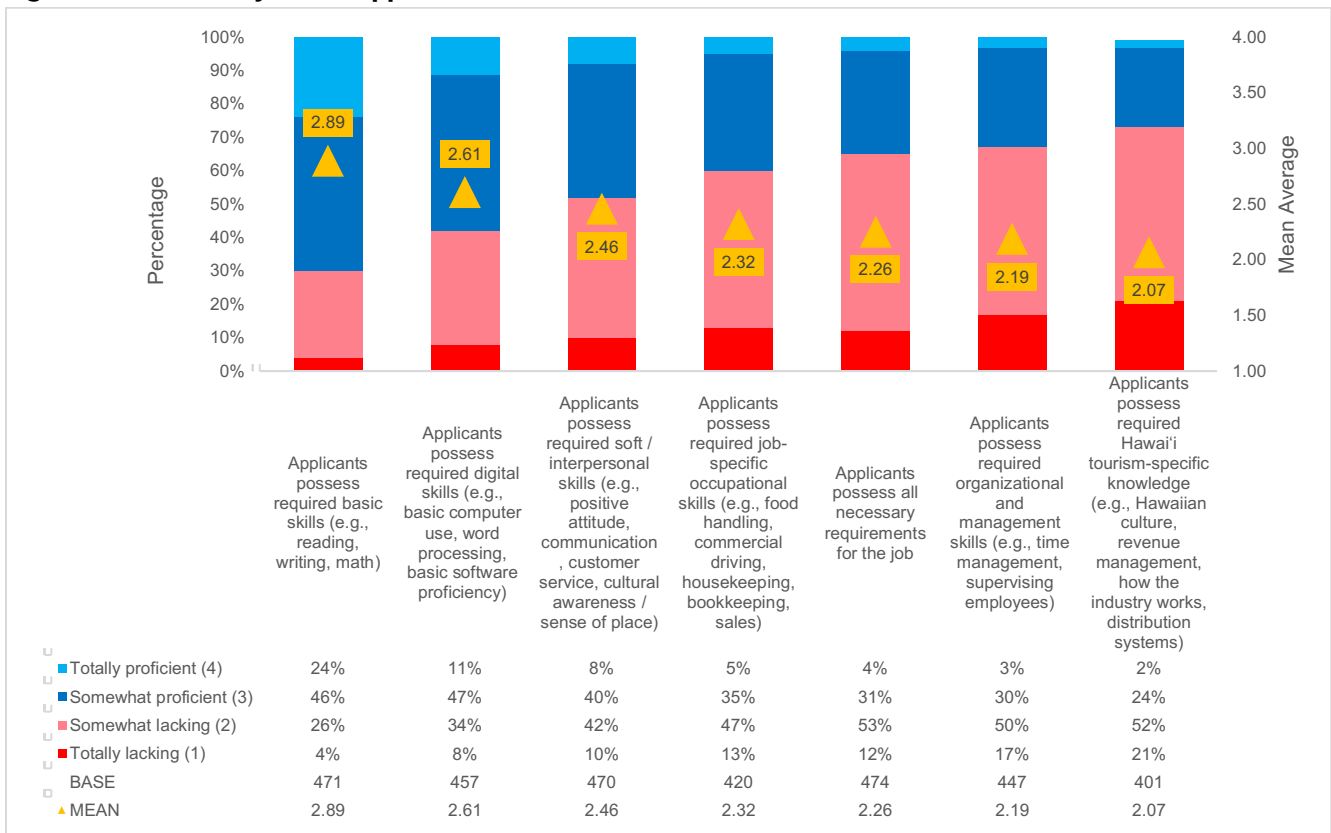
The next highest demand would be for supervisor level positions with a mean score of 2.82 followed by middle managers (2.67) and lastly senior managerial positions (2.54).

3. TODAY'S VISITOR INDUSTRY WORKER – CURRENT SKILLSETS

APPLICANT JOB SKILLS & QUALS - LEVEL OF PROFICIENCY

In this section of the report, business representatives were asked to rate the proficiency or lack thereof of recent candidates who applied for positions within their company. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results a mean or average score was also computed. The higher the mean score (closer to 4.00/ "totally proficient") the more proficient and qualified the current pool of applicants were.

Figure 3.1. Proficiency of Job Applicants



Using the midpoint in a four-point rating scale of 2.50 as a cutoff between a net proficient score and lacking in necessary skills, we see that businesses are relatively dissatisfied in many of the areas tested.

The two areas where local business representatives found job applicants to be relatively proficient were in having basic skills like reading and writing and in possessing the required digital / computer skills for the position(s) they were applying for. At the opposite end, the skillset that was most lacking was Hawai'i-tourism specific knowledge.

- *Among those businesses that identify the visitor industry as their primary business, 26% indicate Hawai'i tourism-specific skills are totally lacking among recent applicants and new hires.*

Basic Skills (e.g., reading, writing, math)

Many employers point to the lack of well-developed basic skills among new applicants. The ability of applicants to read English and communicate effectively in writing or verbally is lacking.

"Very little in terms of skills. If anything, it's basic even you know even language, even communication skills. Oral, written it's really lacking yeah. Even with high school and college degrees it's inadequate." O'ahu Manufacturing Interviewee

Some employers believe the lack of effective communications skills is the result of a shift to short form communication, such as texting, among young workers.

"Well reading and writing. You know if you're composing an email or a document or memo to other people then there's a certain skill set that you need. Basic. Email in on itself not texting kind of stuff but more formalized way of communicating." Statewide Retailer Interviewee

Digital / Computer Skills (e.g., basic computer use, word processing, basic software proficiency)

Some employers have a great desire to better incorporate digital tools into their business, but don't currently have employees with the skills needed to be able to assist with implementing and utilizing these tools.

"We just touched the surface of what the programs can do. We don't dive deeper and there's so many things that we can do with the programs that will offer our assistance with time management and meetings, scheduling all that out. But we don't have time to go and figure out how did these programs work?" Maui Accommodation Interviewee

Older employees tend to have the greatest need for computer skills development, according to some employers.

"Computer skills are very big...We do find some of our more seasoned associates or more tenured associates still struggle with basic computer skills." Statewide Accommodation Interviewee

On the other hand, younger workers, in particular, tend to have the computer skills that many employers find necessary to be effective in front line jobs.

"If they have computer skills, basic computer skills, email and most people do these days especially the younger generation they can navigate excel, email, learn a property management system quite quickly and everything that we have in modern day is all phone and technology based and my systems are all cloud based now as well. So I find that general knowledge for the line worker seems to be okay." O'ahu Accommodation Interviewee

"They're coming in with the basic computers that I need. They're not afraid of them. Sometimes probably a little too savvy. But they're definitely not concerned about you know how to type and that level we're getting in all we need." Kaua'i Accommodation/Attraction Interviewees

Soft/ Interpersonal Skills (e.g., positive attitude, communication, customer service, cultural awareness/ sense of place)

While some do have the necessary skills, a lack of basic customer service skills was mentioned by a number of businesses, specific to front line employees that interact with customers / guests. These skills are more common among applicants who have had prior experience in a customer service role.

"You know I think many of them have the customer service because if they're coming from front line positions whether it's a front desk at a hotel they've got those skills. They enjoy talking with people, they enjoy helping people." Statewide Tour Interviewee

"Just a lack of good customer service. Although some of our, I know you were asking what they have that is good that they're bringing to the table, but what I'm noticing is a lack of customer service experience or good customer service training." Statewide Restaurant/Retailer Interviewee

"Front desk has to be heavy on customer service. Probably three out of 10 that I interviewed, have some skills in that." Kaua'i Accommodation/Attraction Interviewees

Many businesses are seeing a lack of a basic work ethic among applicants, which includes inconsistency in showing up for work on time, demonstrating a sense of urgency in completing tasks and even understanding appropriate grooming and hygiene for the workplace.

"The bar's been completely thrown away. It's not even lower. On housekeeping side, I'm just giving people trial runs. If they walk in, they have a job, and then about less than half of them show up the next day." Kaua'i Accommodation Interviewee

Job-Specific Occupational Skills (e.g., food handling, commercial driving, housekeeping, bookkeeping, sales)

In interviews with employers, job specific skills were not as highly prioritized as other types of more broadly applicable skills as discussed elsewhere in this section. Some of the specific areas of need were identified in the area of food service: compliance and culinary training.

"Food handling would be good. I mean we can't find enough people to work in our café." O'ahu Attraction Interviewee

"Right now, I see a need in our culinary training. If there was something some kind of training back to bring [REDACTED] on site to help them develop their culinary skills. I think that would be great." Maui Accommodation Interviewee

"I think most of them come with a skill set they needed, that's why they go through the interview process. Our managers are looking that they have those skill sets. If anything, it's probably just the specific job, specific type of training they might need, understanding the operations." Maui Accommodation Interviewee

Some employers find applicants have many of the job-specific skills needed to be successful in the role.

"I would say the people that we deal with typically are ready to you know have the skills to do the jobs that we need for our event." Kaua'i Attraction Interviewee

Organizational and Management Skills (e.g., time management, supervising employees)

Management positions were identified earlier in the report as the most in demand today, as well as in the next five years. However, employers indicate that there is a need for greater organizational and management skills among the workforce in order to fill these openings.

"I'm not finding a lot of individuals who come to us with the organizational and management skills." O'ahu Attraction Interviewee

Leadership skills development is a need on the neighbor islands as much as on O'ahu.

"Yeah I think what I've learned in the neighbor islands for sure is leadership skill training is what seems to be lacking. It's very hard to find good leaders who are able to kind of take themselves out of the friend, friend/employee, or colleague role." Statewide Restaurant/Retailer Interviewee

Knowledge and Understanding of Hawaiian Culture

It was clear in the interviews that employers perceive the topics of Hawaiian culture and tourism industry-specific knowledge to be distinctly different.

Employers acknowledge that skills development can be inter-related; an understanding of Hawaiian Culture may help to reinforce soft skills such as attitude and interpersonal communications.

“Hawai’i tourism specific knowledge I think is extremely important in conjunction with the interpersonal skills, the positive attitude. I don’t think you can have one without the other. Those two have to blend right.” Statewide Events Interviewee

Some employers point to the importance of understanding Hawaiian culture in order to provide visitors an authentic experience.

“Then, of course, for the Hawai’i tourism industry I think more Hawai’i tourism specific knowledge would be helpful as well. To be able to make this a really authentic experience for the guests that we’re bringing in that we’re providing services to and then ushering them back home.” Statewide Transportation Interviewee

Understanding and Appreciation of Other Cultures

Some employers pointed to the need for the workforce to have a better understanding of the cultures of visitors who come to our islands. The ability to appropriately communicate and relate to visitors from other countries, in particular, is an opportunity to share Hawai’i culture in return.

“I don’t know how to expose the art of other cultures, to learn about other cultures a little bit. So that if they’re going to work in the visitor industry, they come there with some knowledge already.” Kaua’i Manufacturing Interviewee

“Right now, it seems that we have an awful lot of people who stand and wait and unless that person is there to say hey I need this, people tend to shy away from it. I don’t know why the world is slowly creating these you know individual people that just stand and wait because now you’re dealing with, again, different cultures who probably will not seek to reach out and tell you what it is that they want. In order for you to really create a unique experience for the guest you have to anticipate their needs.” O’ahu Accommodation Interviewee

“So, for example, my pet peeve is when we have Japanese tourists and our associates try to use their Japanese language that they learn on the plantations in a way that’s and I think they’re doing it with good intentions, but because the Japanese is so educated English wise and they don’t like to speak Japanese when we use a Japanese word you know like one or two words in a broken up

sentence I'm almost feeling that it's better that they don't use it and just use English because the Japanese understand English. They just don't like to use it because then they're going to be expected to talk. So it's the ability to show your casual aloha, local style, but not do it in a way where it's possibly offensive to another culture because you're bastardizing their language." O'ahu Accommodation Interviewee

Business of Tourism (Revenue management, how the industry works, distribution systems)

"A lot people that work in my hotel, especially in the line staff and even some of the entry level managers, they don't understand the bigger scope of how our piece works in terms of the total economy and in terms of the sense of place. So the revenue management, how the industry works together is a little bit missing." O'ahu Accommodation Interviewee

Combining understanding of the business of tourism with a local network can serve as an advantage for local residents to be successful in their career in the Hawai'i visitor industry.

"Understanding and knowing the islands and the vendor network is a very difficult aspect to just ascertain. You can't just bring someone from the mainland. You have to be familiar in order to service customers. So that in essence puts some challenges when it comes to a company like ours to find people locally." Statewide Events Interviewee

"So yeah one size does not fit all and neighbor islands are different and each neighbor island is different. We know that because we have stores on neighbor islands. When we visit the neighbor islands it's, the perspectives are different and it's important to understand those small differences because they have pride in their own island and don't necessarily appreciate corporate coming into town and telling them what to do. [...] It's different and so you could turn people off or turn the community off if you don't seek to understand them first." Statewide Retailer Interviewee

Hawai'i Employment Forecast for the Short-Term Future

The State of Hawai'i's Department of Labor and Industrial Relations (DLIR) through Hawai'i Workforce Infonet (HIWI) also performed an economic analysis of Hawai'i's labor market, published in September 2021. The report revealed the skills most advertised by employers in July 2021. The following table shows that customer service skills are the single most requested skill across all job openings advertised online. Additional advertised skills in the report reflect similarly to those skills identified as important in this study, including interpersonal skills, flexibility, positive attitude and more.

Table 3.1. Advertised Job Skills, Hawai'i, July 2021

Advertised Skill	Skill Category	Job Openings
<i>Customer service</i>	Customer Service	12,395
<i>Problem-solving</i>	Basic	3,383
<i>Attention to detail</i>	Basic	3,145
<i>Must be flexible</i>	Basic	2,828
<i>Interpersonal skills</i>	Interpersonal	2,742
<i>Work independently</i>	Basic	2,256
<i>Positive attitude</i>	Interpersonal	2,005
<i>Time management</i>	Basic	1,818
<i>Organizational skills</i>	Basic	1,759
<i>Decision making</i>	Basic	1,451

Source: Hawai'i Workforce Infonet (HIWI) - <https://www.hiwi.org>

4. WORKFORCE TRAINING AND DEVELOPMENT TOPICS

Employers were asked in an open-ended (unaided) fashion what topics would be most important to cover in workforce training and development programs. The top responses are highlighted in the table below.

Table 4.1. Topics of Interest - Workforce Training and Development

	TOTAL
BASE	504
<i>Customer/ guest/ client services</i>	22%
<i>Workplace issues/ policies</i>	18%
<i>Hawaiian culture/ language/ local</i>	16%
<i>Technology related</i>	14%
<i>Other</i>	11%
<i>Communication skills</i>	11%
<i>Interpersonal/ social skills</i>	11%
<i>Management/ leadership training</i>	7%
<i>Hospitality/ Tourism</i>	4%
<i>Health and Safety</i>	3%
<i>Accounting/ Bookkeeping/ Finance</i>	3%
<i>Teamwork/ Team Building</i>	3%
<i>History/ Geography of Hawai'i</i>	3%
<i>Sales/ Marketing/ PR</i>	3%
<i>Math/Reading/Writing/Verbal</i>	3%
<i>Basic skills (non-specific)</i>	2%
<i>Time Management</i>	2%
<i>Trade skills/ jobs (plumbing, electrician, etc.)</i>	2%
<i>Environment/ sustainability</i>	2%
<i>Transportation/ Driving (commercial)</i>	2%
<i>Organizational Skills</i>	2%
<i>Problem solving</i>	2%

The top four topics of interest identified by those taking part in the study were customer/ guest/ client service skills training, workplace issues/ policies, Hawaiian language and culture training, and topics related to technology.

Table 4.2. Top Five Training Topics by Industry

	Accommodations	Attractions/ Recreation/ Entertainment	Food & Beverage/ Restaurant	Retail	Professional Services	Transportation/ Tour Operator
1	Customer/ guest/ client service (39%)	Hawaiian culture/ language/ local (24%)	Workplace issues/ policies (39%)	Customer/ guest/ client service (37%)	Workplace issues/ policies (19%)	Hawaiian culture/ language/ local (32%)
2	Technology related (24%)	Customer/ guest/ client service (21%)	Customer/ guest/ client service (14%)	Technology related (15%)	Customer/ guest/ client service (17%)	Transportation/ Driving (commercial) (22%)
3	Workplace issues/ policies (15%)	Other (15%)	Communication skills (14%)	Interpersonal/ social skills (13%)	Technology related (17%)	Workplace issues/ policies (19%)
4	Hawaiian culture/ language/ local (15%)	Workplace issues/ policies (14%)	Hawaiian culture/ language/ local (8%); Interpersonal (8%)	Workplace issues/ policies (12%)	Hawaiian culture/ language/ local (16%)	Customer/ guest/ client service (16%)
5	Management/ leadership training (15%)	Technology related (13%)	Hospitality/ Tourism (8%); Teamwork/ Team Building (8%)	Hawaiian culture/ language/ local (10%)	Communication (13%); Interpersonal (13%)	History/ Geography of Hawai'i (14%)
BASE	67	71	51	60	96	37

When the results are segmented by industry, we find that customer / guest / client service, workplace issues / policies, and Hawaiian culture / language / local are consistently in the top five training topics identified by businesses, highlighted in the table above.

Customer / Guest / Client Services

- Understanding customer needs
- Adapting to generational / cultural differences
- Problem solving
- Interpersonal communications

The topic most frequently mentioned by employers (more than one in five (22%) overall), was customer service. Customer service is a foundational skill for the visitor industry workforce and a key driver of guest satisfaction. Specific topics that would be useful include problem solving, understanding customer needs, adapting to generational and cultural differences, and developing interpersonal skills.

“So, obviously, in the tourism industry the core product, obviously, is guest satisfaction. Guest satisfaction comes through a couple of things that I would say are very important. Obviously, it’s about human engagement. The human factor is huge. It’s probably my biggest concern going forward for the state, from a this nation point of view is that we start being negligent in sharing the aloha spirit with our guests and we lose our reputation for being a warm, friendly location.” O’ahu Attraction Interviewee

“[Moderator: Do you find that your front-line staff when you hire them are pretty adept to customer service or do they need a little bit more training and guidance?] I think they need more training. I think they consider themselves very adept at it, but then situations arise and you realize we need to train for that. [...] What solutions, empowering people to make on the spot decisions on what needs to be done in order to diffuse a bad situation. I think that’s a specific training that we, all of our employees would benefit from.” O’ahu Attraction Interviewee

“As far as being outside all the time, wherever we see the gap is there strong understanding on Guest Relations. How to deal with guests, how to do a customer service and being a tour guide. So having the outside tour voice, that you're going to be leading a group of people for two hours, two and a half hours, sometimes.” O’ahu Attraction Interviewee

“I think customers, as customers evolve, customers change, I think it’s important to ensure that the training and the classes and the experiences that the classroom can offer is also progressing with the generations of travelers hitting the pavement. [...] You know how do we conform with that so.” Statewide Events Interviewee

“Just customer service in general I think that is something that is definitely learned not inherent among a lot of people and especially in a time following COVID where we had three years stuck at home and little interaction with other people and socialization with peers and teachers and management teams. I think a lot of that has gone by the wayside.” O’ahu Attraction Interviewee

“It’s basic skills. To be able to dress appropriately, to follow instructions, to be able to this may sound a little odd but read and write. There may be and writing skills is not taken for granted so being able to communicate well with not only supervisors or peers, but to the guests.” Statewide Retailer Interviewee

“We want to make sure they're prepared for Asian culture expectations. [...] But I think if there were programs on how to understand different cultures, I think that would be - we're trying to help people understand our culture here in Hawai'i.” O’ahu Attraction Interviewee

Workplace Issues / Policies

- Work ethic
- Workplace etiquette
- Sexual harassment
- Diversity, Equity & Inclusion
- Safety / Compliance

Work / Workplace Etiquette

"Understanding work place etiquette. They're on schedule, you're supposed to show up for work on time. [...] I mean we're talking the basics. Just showing up for work, calling in if you're not coming in to work." O'ahu Manufacturing Interviewee

Some employers mentioned the need for greater awareness among new applicants of how to dress, practice good hygiene and present themselves well in an interview.

"I would say we're finding a lot of very unskilled workforce. There's even basics, very, very basics I would say down to interview skills, grooming skills, basic computer skills we're not seeing that was frequently anymore." Statewide Transportation Interviewee

"We're seeing a lot more challenge with the soft skills in attendance, punctuality, eagerness to work, a work ethic I guess." Statewide Workforce Development Interviewee

"We've run into a completely different paradigm on the Big Island, just the attitude towards work. People aren't anticipatory, there's no sense of urgency." O'ahu/Hawai'i Island Events Interviewee

"Work ethics. Honesty, integrity. General civil behavior." Statewide Retailer Interviewee

Things as simple as understanding how to behave in an office setting present an opportunity to enlighten certain members of the workforce.

"I think for the main office because I oversee that too, employees who work in the main office so like HR assistants or HR managers or even positions within marketing or accounting. Just a lot of people not coming in with experience in just working in an office setting." Statewide Restaurant/Retailer Interviewee

Sexual Harassment / Diversity & Inclusion

Sexual harassment prevention training is important to ensure the workforce doesn't create or encounter issues with HR or issues for the company overall. Diversity and inclusion (D&I) has become an ever-growing area of importance in the workplace; it would serve the workforce well to have additional trainings and understanding in the area of D&I.

"The whole idea of sexual harassment prevention, that's a topic that everybody should know about, and about ethics diversity and inclusion is something that's very important to us. Understanding those rules would be helpful. Which goes along with harassment and discrimination. I mean, basically, the challenging HR issues, which we all face right now." O'ahu/Hawai'i Island Events Interviewee

"You know anti-bias, diversity and inclusion, sexual harassment those are kind of table stakes. They have to you know I don't know that HTA needs to really focus because every, I feel that every self respecting company should have those types of training already or they're going to be in trouble." Statewide Accommodation Interviewee

"I would say that there's a little bit ground swell right now for diversity and inclusion training. I don't know that as a company I would represent that that's our top priority at the moment. But I think that it's on a lot of people's minds more and more and so it would be remiss to not kind of note that and to maybe even figure out how to combine that into other training like cultural awareness, Hawaiian culture training." Statewide Transportation Interviewee

"Well because we don't do any of them the ones that from an HR perspective I would definitely do the anti-bias and diversity. I think that's a big one for us especially here in Hawai'i. A lot of people from other places living here and so I've experienced a lot of although people look like they're from here, they're very caught off guard by the cultural jokes and things like that. So teaching people about that diversity and inclusion." Statewide Restaurant/Retailer Interviewee

"But we've talked about like, is there a way to embrace the special needs population? Somehow, some way, you know, somebody that might have like, a severe learning. [...] So it's like diversity in hiring and diversity in when these people come in and can't keep up maybe the same place of same work phase. But It like makes me think that your Walmart greeters, is there a place and how do we learn more about that diversity and inclusion in the workplace?" O'ahu/Hawai'i Island Attraction Interviewee

Safety / Compliance

Various roles within the visitor industry may have the need to remain up-to-date on safety and compliance (Human Resources, Occupational Safety and Health Administration (OSHA) and other general environmental safety concerns).

“So making sure that the workers know what the rules are, will be very helpful and keeping us within compliance. And it's not something that we normally - we try, but it's a difficult thing to accomplish on your own. That's someplace where if people understood what the rules were; understood what the compliance issues are, that wouldn't be helpful to us when we hire go out to hire.” O'ahu/Hawai'i Island Events Interviewee

Hawaiian Culture

- Hawaiian hospitality
- History
- Place names
- Storytelling
- 'Ōlelo Hawai'i (pronunciation)

Hawaiian cultural training, consistently mentioned throughout the interviews, is key knowledge for the visitor industry workforce. This is seen as a responsibility of the workforce when sharing the islands with visitors. A shared understanding can encourage respect and appreciation for the culture.

“We're here now in Hawai'i and we have to understand the culture here. We cannot just be here and just living day to day without some kind of appreciation and understanding of this place and how native Hawaiians and how local people you know see this more as not just a place to live or a place to earn a living, but it's a special place. It truly is. We can't feel that unless we have some kind of training or education on the culture of Hawai'i.” Statewide Accommodation Interviewee

“I felt that if you're going to take advantage of the benefits of the visitor industry guests from the Hawaiian culture, then you should take responsibility for helping preserve it.” Maui Accommodation Interviewee

The workforce could benefit from Hawaiian cultural training that includes background on history, cultural sites, understanding of place, Native Hawaiians and 'Ōlelo Hawai'i.

“One of the big things is Hawaiian culture, 'Ōlelo Hawai'i, Hawaiian hospitality, and sense of place. That to me is very, very critical because that is what leverages us, it makes us different from Mexico and other areas just this unique culture that we have.” O'ahu Accommodation Interviewee

“Hawaiian cultural training yes versus ‘Ōlelo Hawai‘i, I would go with Hawaiian cultural training.”
O‘ahu Attraction Interviewee

“[Moderator: What about Hawaiian cultural training stands out to you as an opportunity?] You know I think about you know things such as place names. In Waikīkī if there was a training that focused all on the traditional names of places and how to properly pronounce them that would be an investment that I would think the industry I don’t know if they would embrace it, but they certainly need it.” O‘ahu Accommodation Interviewee

There are concerns among some employers that training in Hawaiian culture could be challenging and the knowledge imparted might be different based on the point of view of the individual or organization that is developing the curriculum.

“I don’t know enough about Hawaiian culture training. Depending on which native Hawaiian you’re talking to they have different perspectives. And you know not necessarily the same right. So I don’t know if the training is from whose point of view because there’s just too many different nuances. I guess I would fear that you know you’d have the typical tourist training right, but it’s not culturally sensitive to somebody on Moloka‘i. It’s great for Waikīkī, but not good for Moloka‘i. It’s still culture, but it’s different.” Statewide Retailer Interviewee

One employer would like to better understand the practical implications of training in Hawaiian culture in driving purchasing decisions among visitors, to select Hawai‘i as a travel destination.

“There’s not a ton of data that shows tourists are intensely, are going to make a buying decision based on Hawaiian culture say right. I mean I hate to say that because we’re pushing hard to make Hawaiian culture top of the decision tree. The data showed, the data that I’ve seen shows that Hawaiian culture is important, is a component of visitor satisfaction, but it’s not the driver of the choice vis a vis other things.” Statewide Accommodation Interviewee

Certification

“But, I think where you’re going with this is yeah it would be great if we had a training program regarding Hawaiian culture and if they’re certified in that that makes them even more you know I don’t know more educated, knowledgeable because you’re certified in that or you know that and you did your schooling for that specialty.” O‘ahu Accommodation Interviewee

“Okay, if it's a wedding business. I think what needs more training is the Hawaiian culture training, because we want to bring included Hawai'i. Hawaiian culture in the wedding, in a wedding part of our life. When they got married, and they got married in Hawai'i. It's kind of like creating awareness that you're in Hawai'i, and you need to know that our culture.” Statewide Wedding Services Interviewee

“Hawaiian culture is very difficult for us to train. So if they have some knowledge that's helpful for like, communication skills or time management is hard to train too. [...] All aspects are all in Hawai'i and history and cultural sites that in some, yeah some knowledge that they want to share with the customers.” Statewide Accommodation Interviewee

Computer / Technology / Digital Skills

- Basic computer use
- Office 365
- Revenue management analytics
- Tracking / Forecasting trends

With the technological advances, many organizations would benefit from a workforce that have advanced tech skills. There may be a special opportunity to leverage the younger generations' existing knowledge of technology and upskill in specific areas training others/co-workers, advancing knowledge of industry software and more.

“I think technology is a big one. You know there's a lot of people that are older that are not as savvy I guess IT wise you know and having that available. [...] You know if a housekeeper wants to be a supervisor they will have to learn the software that we have for housekeeping. Same thing with loading dock people. I think especially we learned during the pandemic that you know you have to do more with less so they cross train in other fields.” O'ahu Accommodation Interviewee

“As we move into digital transformation, yeah, we're going to have to have third party consultants that hold our hands through more technical kinds of things, especially if devices start to get more sophisticated. [...] Maybe we would need somebody on the outside to help us with that.” Statewide Retailer Interviewee

As technology becomes more a part of many businesses, demand grows for employees with spreadsheet, database and other knowledge.

“And then really to be able to have I mean excellent Excel skills, other database knowledge would be great as well to be able to understand how to make data tell a story, help with decision making for a business.” Statewide Transportation Interviewee

“The software programming has to be maintained by a program manager. The hardware, the phones, the iPads, the scanners, and all those things all need to be maintained. That’s not exceeding guest expectations. That’s just meeting guest expectations. What’s really problematic for us is that the likes of airlines have set the bar up here on technology right. [...] They set these expectations so I think there’s a huge opportunity for us to take advantage of technology in a way that it doesn’t replace the experience it enhances the experience.” O’ahu Attraction Interviewee

Communication

- Interpersonal communications
- Presentations
- Storytelling
- Professionalism in communicating

“I mean I would really like to see a training on good communication.” Statewide Restaurant/Retailer Interviewee

“Maybe more about improving themselves, their communication skills, presentation, and you know being able to converse with our guests easily without being shy or you know having those skills.” O’ahu Accommodation Interviewee

Building on the basic communications skills that are required, some employers believe there is a need for increased professionalism in communications.

“I think they can definitely come in better prepared. But understanding communication skills. Now that is something that to certain degree can be taught, the written word can certainly be taught. That’s taught in grade school in high school, right? But then professional writing and again, it’s a little bit different. Because we’re in Hawai’i, we have a different way of communicating, even in a professional sense than maybe the folks on the mainland do.” Kaua’i Manufacturing Interviewee

Interpersonal / Social Skills

- Teamwork / Team building
- Interviewing basics

Teamwork

I mean I think it's very helpful for people to know more about who they are and how they work, how they community, how they listen, and how others do those same things. So that kind of training happening before you come to a work place I think would be very helpful..." O'ahu Attraction Interviewee

The importance of showing enthusiasm was mentioned by some employers as an opportunity, as it can impact an employee's ability to be successful in other areas of the job.

"Airlines, retail, transportation, tourism activities I think what I hear at least in the people that I've been interacting with is that soft interpersonal skills is an area that we would love to see more of our applicants prepared for when they come in. You know anything from interviewing skills or communication to storytelling, to enthusiasm, high energy levels." O'ahu Accommodation Interviewee

"I think we can do better in preparing them for the interpersonal skills. The next generation have been so in greater technology and technology takes away from the interaction of real people and just being with people. So that's where I think it's lacking is the whole emotional intelligence, the interpersonal skills, and how to deal with situations on a face-to-face basis." Statewide Workforce Development Interviewee

Management / Leadership Training

- What is means to be a leader
- Showing empathy
- Conflict resolution
- Building a team
- Managing in a remote work environment
- Business of Hawai'i tourism

Leadership, working with and training employees, compliance/ HR and manager-specific interpersonal skills are all top competencies that the workforce should have if they intend to apply for manager level roles.

Empathy

“One thing is management skill that helped to be a good manager type of training, like it's difficult to train to have somebody empathize your employee. But if there's a good training program to bring out skill, or characteristics of the good leadership out of that person know equally.”

Statewide Accommodation Interviewee

“So instead of always looking for different ponds to fish out of, why don't we take a look at the ones that we currently have and engage them through additional leadership training and help them become stronger, become better leaders to train others.” Statewide Accommodation Interviewee

“How to motivate people. How to say things and when to not say things. That's hard to train in a classroom though I think that's more on the job when you're supervising people how to talk to them. [...] That's more of an experience kind of skill, but it would be helpful to have that at least some preliminary education on that.” Statewide Retailer Interviewee

Conflict Resolution

“Then understanding how personalities can interact. We're all about 'ohana and teamwork. You know Hawaiian says ho'oponopono when you get together and then you hash things out and then you make up. But I think a lot of people take things personally or they don't understand that other people's personalities and strengths are a good thing.” O'ahu Accommodation Interviewee

“What I think isn't taught and that we are finding ourselves in great need for, is professional maturity. So it's those soft skills that you are able to instinctively know when to say something, and maybe when not to say something. Whether you're a manager, whether you're a supervisor, whether you're a lead, that's to me very critical and to teach that to somebody is even more of a skill than I ever understood it to be before.” Kaua'i Manufacturing Interviewee

Teamwork

Working as part of a team and understanding the roles and responsibilities of individual team members was also mentioned as a need among recent applicants.

“The culture and the respect of employees in the workplace I think is another one that we do a lot to try and nurture. I find that a lot of the employees who come are not used to working as part of a team don't necessarily have that respect for collaboration and for working towards things that work for everybody.” O'ahu Attraction Interviewee

“I mean those job specific I think are while important I think it's good to have cross training. It's often when you look at that you know especially in hotels there's a lot of cross training involved.”

That's where I think it opens you up to being flexible and being able to adapt to a changing environment." Statewide Events Interviewee

Managing in Remote Work Environment

The sudden increase in adoption of remote work has increased the complexity of managing teams and requiring managers to learn new approaches.

"I mean to train someone up to manage people it's me having to do it myself. It's a lot. They definitely don't have the skills. [...] It's soft skills and the work from home I think that's complicating it. Because managing people that are remote is a whole you know new type of management style. [...] So managing that is just a different, it's going to evolve to be a different style." O'ahu/Maui Retailer/Manufacturing Interviewee

Business of Tourism

"I would say one thing that's missing on this is you know we have operational and technical training it would be to get the financial training. It's just basic, it's incredible how people don't have basic knowledge of how a business works or how an industry works right. [...] We get graduate students who don't have an understanding, a basic understanding of how tourism works and its input on Hawai'i or how a hotel works or an airline or anything else." Statewide Accommodation Interviewee

Regenerative/ Sustainable Tourism

- Regenerative Tourism 101

With the increased focus on destination management and awareness of the visitor industry's broad ability to impact the community, regenerative tourism is a topic that is top of mind for many in the industry. This was especially clear during the in-depth discussions where employers had the opportunity to delve into their thinking on the topic. However, this is a topic that may be less relevant for the workforce than employers themselves.

Sustainability is not just defined by financial success, but also the impact that it has on residents, on the perpetuation of Hawaiian culture and environmental sustainability.

"Regenerative tourism, sustainability and green practices, Hawaiian culture training and 'Ōlelo Hawai'i. All of those things kind of resonate with me in terms of the way that I think we need to pivot our industry to focus on the culture, to focus on the language, to keep it alive." O'ahu Accommodation Interviewee

“There needs to be more you know awareness. I don’t know if that’s really cultural because now it’s getting into like environmental, eco. But I think tying it into the culture or respecting the culture. I guess more training on respecting the culture of Hawai’i.” O’ahu/Maui Retailer/Manufacturing Interviewee

“I think with regenerative tourism, generally, visitors might miss out on the purpose of, why an ecosystem exists? Or why some of these properties even come into existence? It’s a huge cultural history lesson that I think we can all learn something from.” O’ahu Attraction Interviewee

Many employers have a difficult time understanding what is meant by “regenerative tourism,” in some cases confusing it with sustainability or limiting it to environmental protections.

“Regenerative tourism we talked about that a little bit earlier it’s one of those things that I think is difficult to grasp for me.” O’ahu Accommodation Interviewee

“We’re all trying to make it sustainable, but what do you mean by regenerative and how can that be taught.” Statewide Workforce Development Interviewee

“Sustainability and green practices I feel that that’s important because we do run a bakery. Are we green in our practices?” O’ahu/Maui Retailer/Manufacturing Interviewee

There is interest in having easier access for employers to get information and training on this topic.

“Maybe if there was an easier way to get access or maybe there is and I just don’t know. Like more of the Hawaiian culture, sustainability I’m sure it exists out there, but getting it in front of the employers and easier access I think that that would be a big help.” O’ahu/Maui Retailer/Manufacturing Interviewee

There is acknowledgement among some employers that this topic is not important for everyone.

“As I understand regenerative, we can’t burn the candle at both ends, as my grandmother used to say. I’ve actually felt for years that we can’t just keep pumping people into this island. [...] The Hawaiian culture training is great. I do believe that should be part of it. But then I also feel we need to remind ourselves something folks, or many folks aren’t really interested in it. They want a warm beach where they can go and snorkel and see colorful fishes, and they don’t really care about Hawaiian culture.” Kaua’i Accommodation/Attraction Interviewees

Job Specific Training

There were a number of job-specific training opportunities identified—food handling and maintenance-related were topics mentioned most often.

Food Handling

There are career paths and opportunities for workforce in the various food businesses; food handling and sanitation training should be considered as a program for those interested in this industry.

“You know I don’t know the enrollment situation at KCC. There definitely seems to be a lot of new restaurants popping up and they’re always hurting for cooks. So it feels like that’s an opportunity in the market.” Statewide Workforce Development Interviewee

“So just in food handling the bakery has to be a certain cleanliness requirement so we call them sanitation workers. It is one of the harder jobs to fill. [...] They’re all following the same like FDA guidelines. Yeah having someone train them on that would be very helpful. I think there’s a bigger need out there it’s not just [REDACTED]. It’s anyone that has a food handling business.” O’ahu/Maui Retailer/Manufacturing Interviewee

Maintenance-Related

Communicate the opportunities of maintenance roles and the importance of these jobs in the visitor industry. Consider training that can be tailored to the unique needs of the industry.

“You know, maybe, I know there’s a lot of properties that are needing property engineers or maintenance managers. There’s a lot of, there’s a HVAC course I think at Honolulu Community College. There’s some courses that may dabble in parts of that job, but I don’t think there’s any type of finishing course for that type of work.” Statewide Workforce Development Interviewee

“[Moderator: If you could have a magic wand and snap your fingers and create another program in a different area or in a different topic, what would you create, what would you suggest?] Culinary is important. Facilities management and upkeep is really important. So the trades we’re forever looking for plumbers oh my gosh.” O’ahu Attraction Interviewee

Other Training Topics

Offer workforce additional resources for developing a broader understanding of the visitor industry market and relevant trends.

- **Market Trends** - *“I think market trends and industry trends we’re always looking for because we don’t have the time and capacity to do that.”* Statewide Tour Interviewee

"I think with market and industry trends it's a little bit more you know hard skills focused. Getting as much correlated data and case studies and really experienced people that would be able to lead these conversations and be able to provide insight that frankly wouldn't already be available inside a large organization." Statewide Transportation Interviewee

- **Role of Government / Government Relations** - *"So I've realized as I've gone through the whole COVID situation trying to work with government, Department of Health, how important my role is and to be an advocate to get things maneuvered so that we can reopen, reopen safely, get my people back to work. That's why I've learned in this last year and a half how critical that is and I've realized that a lot of people who were separated are not part of that don't understand how legislature works, how talking to the mayor, talking to the governor can help us bring back buffets. [...] So just talking about how that connection could be beneficial to us."* O'ahu Accommodation Interviewee
- **Personal Financial Management / Planning** - *"I think understanding how they manage their future and how they use the salary regardless of what it is now with the mind towards what they want in their future. [...] I think that kind of knowledge is not taught in the schools and it's very, very powerful for young adults especially."* O'ahu Attraction Interviewee

"We're just getting ready to look at some new retirement offerings, financial planning, you know a number of things that are on their personal level might make some difference for them. Retirement and personal financial management I think is very important especially in this area because it's so challenging to live your life the way you envision it because of the cost of living here." O'ahu Attraction Interviewee

Networking Opportunities

The workforce can benefit from having networking opportunities at multiple levels (job role/title) to connect with like-minded individuals.

"Being able to have those discussions with you know that's why the networking opportunities where HTA and HVCB and the island chapters when they would have these meetings it wasn't so much that what they were presenting on because yeah that's you know people are sitting around for the presentations but it was really in between those presentations when people were networking and talking with each other. [...] But on an operations side of things because I work a lot in operations there's less of that." Statewide Tour Interviewee

I mean museums are just really one category, but there are a number of communities of work that I think would benefit from knowing that they're not alone in facing the challenges before them. I think that's a great tool. It doesn't cost anything and we now all learned that Zoom is not a

negative. I mean now that we can meet in person actually prefer Zoom because it makes my day easier to manage.” O’ahu Attraction Interviewee

Workshops, which also provide a chance to network, can hone certain skills and/or help to problem solve for issues that come up for those working in the industry.

“So a workshop where they get to pick a partner and do some activities like that I could see be really beneficial, whether they're these full-time people we're looking for, or high school seasonal.” O’ahu/Hawai’i Island Attraction Interviewee

Communications Channels

“Yeah I think the Hawai’i Tourism Lodging Association and the well, obviously, there’s the convention bureau and Chamber of Commerce they’re all, they all have very engaged members I guess. Get the buy in from and support from those industry associations and they’ll get the word out. That’s what they’re paid to do, that’s their job.” Statewide Workforce Development Interviewee

“A lot of the bigger companies they have their own very functional HR departments. But the smaller companies are what we’re trying to help because they don’t have a lot of HR.” Statewide Workforce Development Interviewee

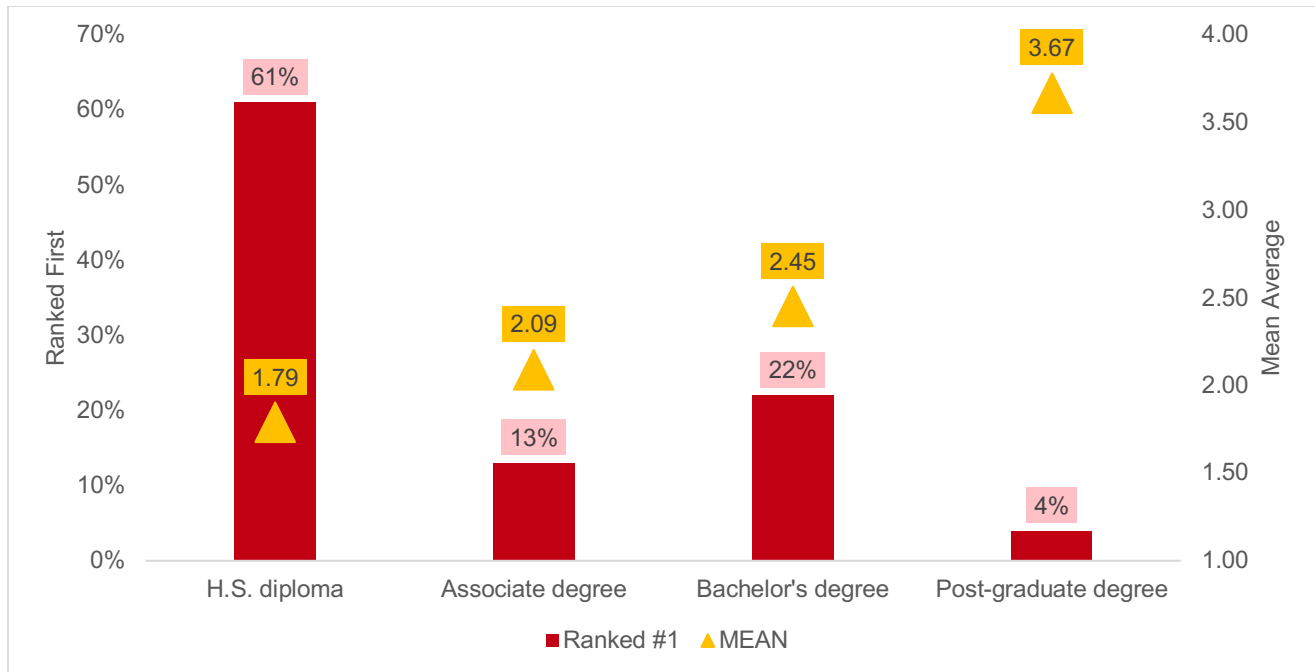
“I think that probably direct connection with the learning and development responsible individual is helpful. Hawai’i Employers Council is a great mechanism to ATV and SHRM you know two training mechanisms that would be helpful. Yeah I would think it would probably need to be a blanket approach especially for businesses that kind of subscribe to one and not the other.” Statewide Transportation Interviewee

5. EDUCATION

NEEDED LEVEL OF EDUCATION

Those taking part in the study were then asked to rank in order, first through fourth, the level of formal education that is currently needed most at their company for open positions. The graph below highlights the percent that ranked each level of education first as well as the mean or average score. The lower the mean score (closer to 1.00/ first) the greater the current need.

Figure 5.1. Level of Education Ranked by Need



When looked at in the aggregate by mean or average score, we find applicants with a H.S. diploma to be the most in need at this time coming in at a low mean score of 1.79 out of a possible 4.00. Ranking second in terms of desirability were those applicants with an associate degree (2.09) followed by those with a bachelor's degree (2.45) or post-graduate degree (3.67) which ranked last.

High School

"You know we try to hire good attitude people. As long as they have a good attitude they can learn anything. They don't even have to have higher education and they can become managers, our managers." Statewide Retailer Interviewee

Its infant stages, I would say high school, and college is probably where we're looking. I mean, certainly, this is something that you an industry, you can enter and not have a college degree and be successful. [...] With the vocational skills that you could develop in this industry, and there's a need for that. I think that there's a movement now to seeing if for the longest time everybody's

talking about, you got to have a college education, they're getting money. But I think that's shifting a little bit, and people are starting to see that vocational skill sets are valuable, and they can be sustainable.” O’ahu/Hawai’i Island Events Interviewee

“I think that some you know what we would consider you know blue collar jobs who are working with their hands and not working in front of a computer all day is it’s a really respectable job and there’s a lot of jobs like it like welders and other jobs around the world and the country that don’t have the same cache and prestige that they once had. So I think that those kinds of skills, making sure that people are aware of the great opportunities that they may have without a four-year degree frankly and the things that can keep them not only well paid and home in their own state, but also just really contributing to a thriving part of the economy.” Statewide Transportation Interviewee

Post-Secondary - Discipline / Subject Areas

At the conclusion of this section of the study, business representatives were asked when it comes to post-secondary education what discipline/ subject areas of study were the most in demand at their company. The top responses are highlighted in the table below.

Table 5.1. Post-Secondary Education - Areas of Study Most in Demand

	TOTAL
BASE	487
<i>Business administration</i>	33%
<i>Computer technology/ IT/ Programming</i>	13%
<i>Environmental/ Sciences</i>	12%
<i>Communications</i>	11%
<i>Other</i>	9%
<i>Hospitality/ Guest services</i>	9%
<i>Hawaiian culture</i>	8%
<i>Soft skills</i>	7%
<i>Trade school/ vocational training</i>	7%

The greatest need appears to be students with a business-related major, at 33%. Ranking a distant second is the need for those with a computer/ technology related skillset or degree. In third place was the need for those with a degree in environmental sciences or science degrees in general. The only other field of study that received mentions from at least 10% of the respondents were those students with a degree in communications.

Associate & Bachelor's Degrees

Postsecondary education, whether 2- or 4-year degrees can be useful in the workforce, depending on the desired position.

"I still see and do want to we've started to re-engage at the community college levels here.

[Moderator: On what topics?] Mainly to you know the tourism and the hospitality business to come in and you know if they want to seek experience in our cruise we have what we call travel directors that we put on site to work with our guests to provide customer service on the ground in various forms." Statewide Events Interviewee

"I mean a four year college degree would probably supersede a certificate, but I would still be you know I wouldn't want it to be mutually exclusive it's like if they could have both." Kaua'i Attraction Interviewee

"There's a the TIM program, I think that's UH or is that... [...] I think that's been - I forget which university it is, but I know there is that program, and people graduate with that degree and that's amazing. Because they get into general management, hotel management. I think it's a great. We have a couple of our managers here in the company, are our graduates with that school." O'ahu Attraction Interviewee

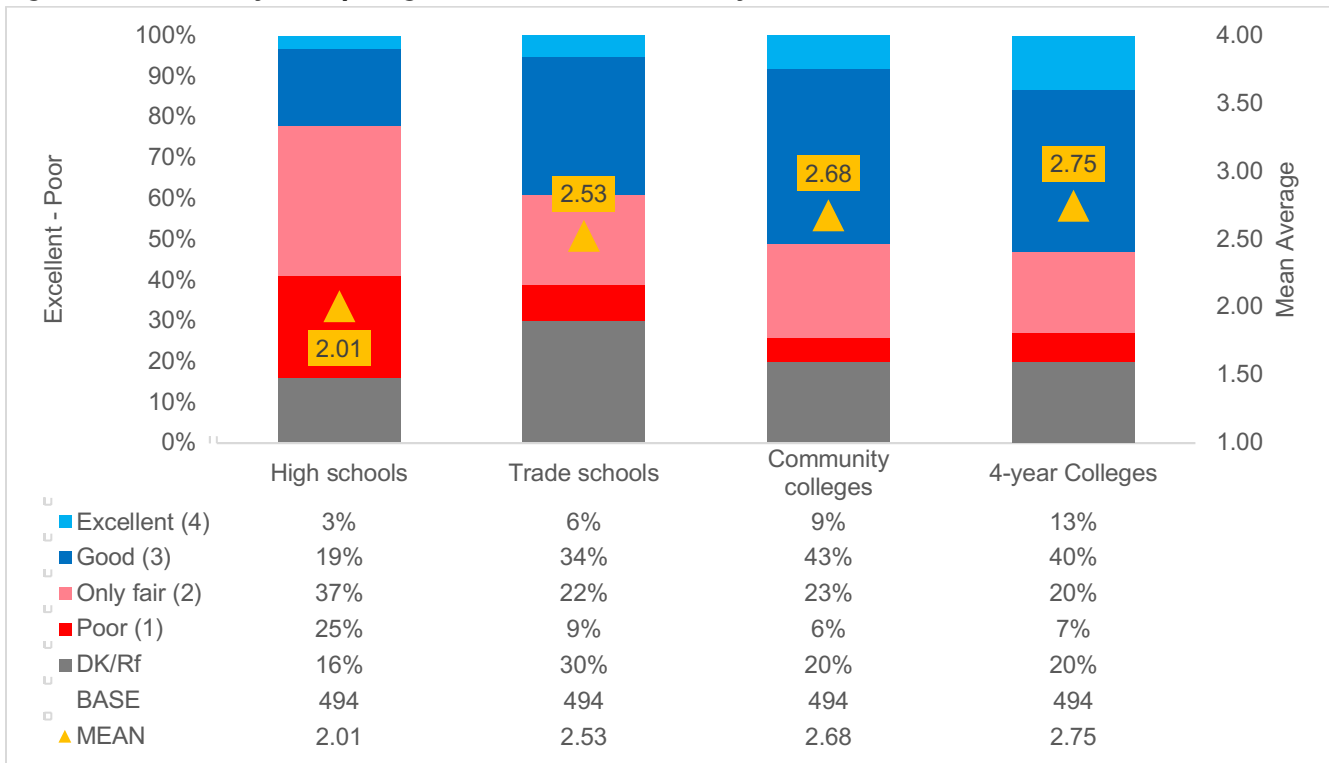
Post-Grad

"We're getting highly qualified people applying. People with master's level education, but we don't have positions that fulfill their needs for professional growth and development." O'ahu Attraction Interviewee

EDUCATIONAL INSTITUTION JOB PREPARATION

Next, those businesses taking part in the study were asked to rate the following educational institutions specifically on their ability to prepare workers for visitor industry jobs at the company they are representing. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results, a mean or average score was also computed. The higher the mean score (closer to 4.00/ "excellent"), the more positive the overall perception.

Figure 5.2. Proficiency in Preparing Students for Visitor Industry Jobs



When examining the mean scores which summarize the results amongst those who do have an opinion on each educational level, we find that high schools were the only ones to receive an aggregate score below the 2.50 midpoint signifying lower levels of satisfaction. Trade schools at 2.53 were just at the border while community colleges and four-year colleges were slightly better in terms of perception but still below 3.00.

Generally speaking, the results indicate a general split in terms of how these businesses rate the job the educational system is currently performing to prepare students for a career in visitor industry. Roughly half have a negative view while the other half thinks more positively when the "don't know" responses are not included in the percentages.

Start Earlier than High School

Given the perceived importance of better developing basic skills (reading/writing/work ethic) and soft skills (interpersonal communication, teamwork, conflict resolution, etc.), there is a sense among many employers that coordination of development programs by the industry start earlier than high school.

"You know it's got to start in the kindergarten I think. I mean that's when you're developing your behaviors." Statewide Retailer Interviewee

"Well what we're seeing at the high school level is by the time they're high school it's a little too late quite honestly. So we are actually looking at working within kind of the intermediate and suspect not too far off is us working within the elementary school so that the entire continuum of education is supporting these. [...] How do we get our youngest kids because you know if you're not growing up with those interpersonal skills, if that genuineness, that aloha is not real from within you at a young age, it is really hard to develop that as you get into high school and into college." O'ahu Accommodation Interviewee

"From elementary, we have to start early on, or in high school. They're already somewhat have their own personality. [...] I think that's where our system has somewhat failed if they haven't really focused on that it's been so much more curriculum based, subject matter based. But a lot of surviving in the world in everyday life is soft skills." Statewide Workforce Development Interviewee

High School

Many of the opportunities identified by employers revolve around exposing high school students to a career in the visitor industry and helping them understand the practical application of their classroom learning in a real-world employment situation.

"I think it's important for high schools and colleges to know that there are opportunities in this field. That it's something that they could inform their students in saying - this is a field that you might be interested in." O'ahu/Hawai'i Island Events Interviewee

"I would say that one of the approaches is to work with the DOE and the private schools to have open days at industry activities so that high schools and what have you can come in." O'ahu Attraction Interviewee

"I think if they do want to keep people on island then they are going to start early with programs in the high schools to generate interest." Kaua'i Attraction Interviewee

"Probably both but start at having the high school level sector partnerships and create opportunities for kids to get a certificate or something by working in the summer or couple summers at least." Statewide Workforce Development Interviewee

"I'd like to see a lot of this happen in high school because I think there's a big shift whereas not as many people are going straight from high school to college or there might be a slight delay or maybe online school where they're still working." Statewide Transportation Interviewee

"Similar to what we're doing the [REDACTED] is just exposing students to what kind of opportunities there are in the hospitality industry. Whether it's managerial, whether it's technology, there's so many different positions in the hospitality industry, and get them exposed early on." Statewide Workforce Development Interviewee

"I think the TIM's program is fine, I think some of the high school programs you know the people that are going to excel will excel no matter if they're in private or public. I think it's really the early education as a state that we're really missing the mark." Statewide Workforce Development Interviewee

"You know being a mother of two girls, Hawaiiana is definitely taught in the schools. You know throughout the 12 grades. But what's missing is the responsibility and I think it starts at that level. It wouldn't be at getting ready to enter the job market type training." O'ahu/Maui Retailer/Manufacturing Interviewee

Fundamentals right. Their grammar oh my gosh I guess social media teaches us how to be not you know not worry about their spelling anymore. So there's an element of just communication, verbal and written. The second thing is basic math, arithmetic and so that they can take the opportunity because most of our jobs will end up if they get into administration will need to understand spreadsheets, formulas, financial statements." O'ahu Attraction Interviewee

"I have a personal belief that high school curriculum should include just you know basic finances knowledge right. I mean to me again coming from a very, very heavy math background I think most of us would benefit from here's the economy 101 and how debt works and how all this stuff works. They would benefit 100 times more from that than calculus right." Statewide Accommodation Interviewee

Community Colleges

Community colleges can serve the workforce with job-specific skills that are important for Hawai'i's visitor industry—particularly when it comes to culinary and technical skills.

"I think KCC does a really, really good job with the food and beverage side. A really good job. We've been really happy with working with KCC. So everything I said about TIM and opportunity you know I think KCC at least in one very microcosm in terms of just food and beverage has executed on fairly well." Statewide Accommodation Interviewee

"Well on Kaua'i at our community college and it may be throughout the state but I know for Kaua'i we have a chef over there that has a catering business it's called [REDACTED] and he's one of the better chefs on the island. He's been doing classes you know to teach kids that want to get into culinary. On the culinary side he's done an incredible job right and there's been success stories in culinary and that's where it kind of starts right." Statewide Restaurant/ Professional Services Interviewee

"I don't think the technical training is quite as robust as it used to be. Because the community college system. We used to focus on more on technical skills than they do now. I don't think that - the availability is I think still there, it's just not as robust as it once was." Maui Accommodation Interviewee

"Revenue management, exposure to finances. So not necessarily saying a person has to be a controller or accounting degree, but exposure to knowing how money flows through a hotel would be the two big ones that stand out." Statewide Accommodation Interviewee

Four Year Colleges

While the TIM school can serve as a visitor industry resource, there may be opportunity to align workforce needs and skills gaps more closely with the school, in order to better serve the current needs of employers.

"The TIM school used to be you know the premier TIM school in the world." Statewide Workforce Development Interviewee

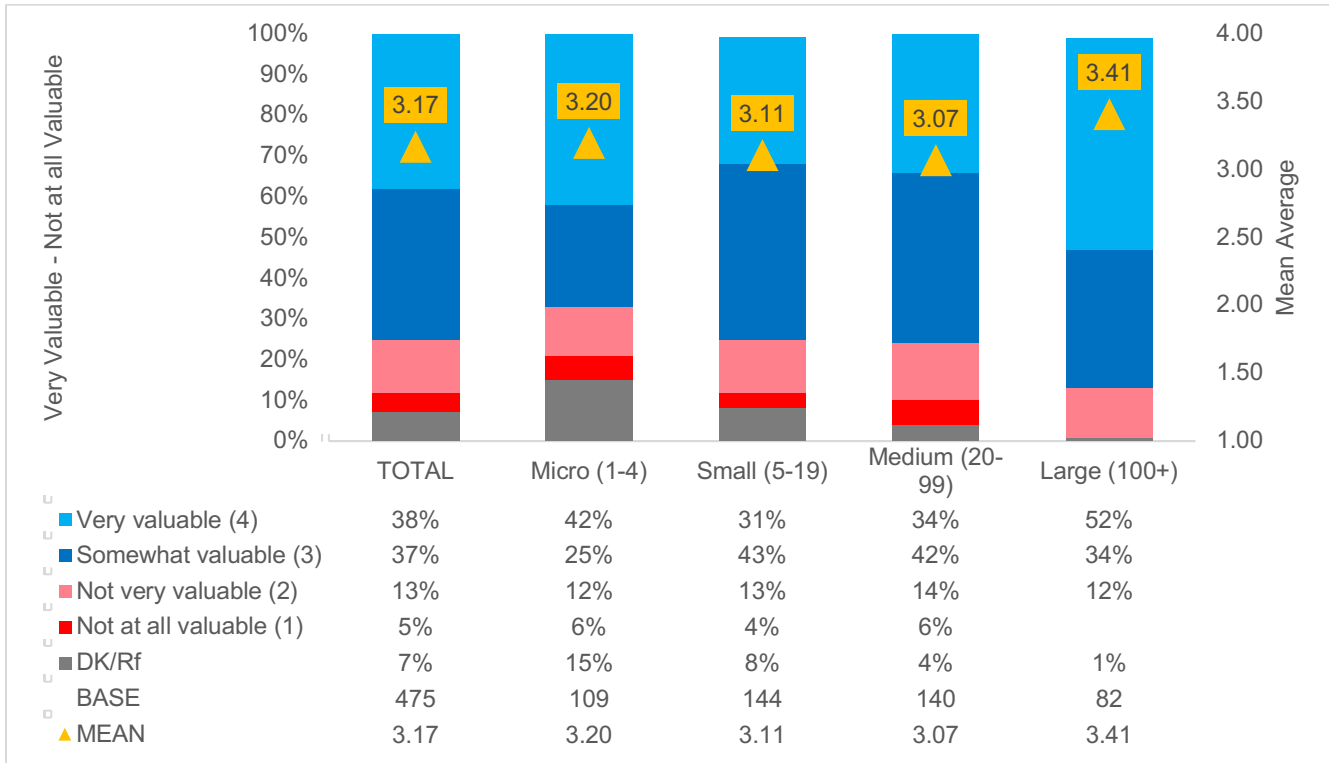
"I mean every single TIM graduate in my mind should have had to had interned or done something at a hotel before they graduate and that's not a requirement. The curriculum problem is a bigger one and again I reference us hiring from banking and other industries it's because you know until recently I don't think there was a revenue management curriculum. You now the education here was just so rooted in old school type this is how a hotel may have been run in 1995 that they're just, we just wouldn't hire from here because people weren't exposed to the right curriculum." Statewide Accommodation Interviewee

JOB CERTIFICATIONS

Perceived Value

Those taking part in the study were then asked to rate the perceived value in job-specific certifications within their organization. They were instructed to quantify their perceptions using a standard four-point rating scale highlighted in the table below. In addition to the percent results a mean or average score was also computed. The higher the mean score (closer to 4.00/ "very valuable") the greater its perceived internal value.

Figure 5.3. Value of Job Certifications



The research shows that businesses who participated in the study do value job-specific certifications within their own companies. Overall, 38% provided a TopBox (very valuable) result with a near equal number (37%) agreeing these certifications are somewhat valuable to the employee and employer. Of the remainder, roughly one in five sees little to no value in these certifications with seven percent having no opinion on the topic. When these results are looked at in the aggregate they result in a mean or average score of 3.17 out of a possible 4.00.

The value placed on job-specific certifications is highest amongst larger-sized firms as highlighted in the graphic above.

- *Companies that currently allocate in their budget for employee training and development place a higher degree of value on job-specific certifications.*

Depending on the role and certificate held, certifications can provide the workforce in Hawai'i with the advantage of having a job-specific skillset and can show an employer a level of educational investment they may find valuable.

"Well, I think certification is one component, but all depends what businesses want to recognize. I mean, certifications, it's usually the basic level of showing your qualifications. So start from there and, again, I think we can't really have the answers until we all come together and talk about what is that next level of certification?" Statewide Workforce Development Interviewee

If broadly applicable certification programs are made available, work may need to be done to help employers understand the relevance to employees who do not currently or typically have such certificate programs available to them.

"I think where there's more technical kind of requirements of the job so engineering, probably loss prevention, culinary would be areas that I could see certifications. I'm struggling with areas you know that are more operational like our bellmen, our housekeepers, our front desk, our food and beverage outside of what we've already spoken about." O'ahu Accommodation Interviewee

Certifications Provide Value

Many employers believe that certifications can be beneficial for businesses looking to hire employees that are skilled and ready to fill the role immediately.

"For our area right we have meat and seafood, managers so we have people who get certified in those areas right. Yeah I definitely think it's beneficial." Statewide Restaurant/Retailer Interviewee

"So what comes to mind is getting someone to be work ready in a shorter period of time. And not having to spend four years in college. [...] That would fill the work gap for employers like you know [REDACTED] where if they had a certification on food handling, if they had a certification on I don't know processes, logistics that would have them job ready and be ready to enter into the workforce faster." O'ahu/Maui Retailer/Manufacturing Interviewee

"Like certainly when I handle interviews and I interview people for positions I look at their full resume and their certifications included to see what they've proactively done in the field in order to better themselves for the tourism industry or the position they're applying for." O'ahu Attraction Interviewee

"I think ongoing certifications, regulations are really helpful too. Right so earning a certification after completing a course is one thing, but the certifications that require you to have continuous education are more helpful." Statewide Transportation Interviewee

"It's certainly looked upon positively in our industry when you have what they call CMP to your name. Certified Meeting Professional. You know there's other certifications that you can get in the cruise industry, even in the DMC world. Is it important from my perspective but I don't think it has ever prevented us from advancing or anyone from developing in their skill set by not having it."
Statewide Events Interviewee

Some businesses may provide higher compensation for certificates, while others do not.

"I think they're listed as preferred qualifications for most roles. So that can give them certainly a leg up as a candidate over another candidate. It can garner more compensation. Probably more compensation than another level altogether." Statewide Transportation Interviewee

"I think it does mean a lot because they have spent the time they've invested the time to learn more about their surroundings where they are, and they care about the visitor industry in that way. Now, do we value it as far as the dollar value? We don't." O'ahu Attraction Interviewee

Some businesses that value certifications initiate programs that assist employees with obtaining certificates.

"[Moderator: Does your company recognize the value of certifications?]" I believe so. So I also oversee the benefits so that is something that I'm trying to implement with my higher ups is some type of education reimbursement. From right now what I notice it's kind of if you ask for it hey you know can I be compensated for a portion of this certification or degree that I'm getting. I have seen depending on the person that someone can get promoted to have a wage increase." Statewide Restaurant/Retailer Interviewee

"This is like, gosh, a while back, but we partnered with the community colleges, to have companies send their employees to this soft skills program. So that if they get that certificate, then employers will see - oh, okay, they had the training, they understand how to take thank you. They understand the soft skills." Statewide Workforce Development Interviewee

Others see certificates more valuable for certain roles or for particular skills needed to fill a job.

"I think it's okay if it's a particular skill set like culinary to be certified because then there's food safety issues, there's cooking skills, there's certain management skills. It's a narrow skill." Statewide Retailer Interviewee

"I would just need to see what they are to see if it's an advantage. I guess they could serve as an advantage if it was a competitive workforce. [...] It's just not competitive to, if it was competitive, I'd lean towards somebody who had something like that." O'ahu/Hawai'i Island Attraction Interviewee

Others see certifications as valuable for the workforce but may not be aware of the programs available.

"I know of them, but I can't tell you what they are. And it's again, I think the industry could do a better job of reminding us, of these programs are out there...Because again, all of us we're busy. And if we see something, hey, wow, this is great." Kaua'i Attraction Interviewee

Certifications Provide Little to No Value

Businesses may appreciate the skills gained from a certification program but admit that it does not necessarily provide the intended value or garner any additional favor for the prospective employee.

"It really just depends on what the goal of the program is, and what's the curriculum that gets you there. So whether there's a certification at the end or not, it doesn't necessarily matter to me. It matters that the employee, or the person going through it gained something. I don't necessarily need to see a certification. I need to see it executed, and actualized." Kaua'i Manufacturing Interviewee

"I really, I didn't look for that when we were looking for a director of finance, but it helped again seeing that on a resume it's like wow you specifically studied for that and you got certified. It would help, but it's not necessary." O'ahu Accommodation Interviewee

"[Moderator: Do you feel like, do you perceive certification programs to be similar or different than the types of workforce training we've been talking about today?]" I don't know I mean I guess you could, it doesn't seem like any of those would really qualify as needing a particular certificate or certification for." Kaua'i Attraction Interviewee

Some businesses do not equate a certificate with expertise on any particular topic.

"I would be cautious to use certification for broader things like Hawaiian culture. [Moderator: Why is that not appealing to you?]" Because I think it gives a false sense of expertise." Statewide Retailer Interviewee

"Honestly, I'm always suspect. I mean, because I know plenty people who have certifications. From event like meeting planners group or whatever, and that doesn't always mean that they know what they're doing." O'ahu/Hawai'i Island Events Interviewee

"I personally don't see that as a need. I think Hawai'i is so small that anyone who's proven to do their job I mean in my philosophy every piece business that we own and have is ours to lose if we don't do the right thing. So whether you're certified or not you could lose the business just as easy as I can or you can win the business as easy as I can or as hard." Statewide Events Interviewee

Some businesses have created their own in-house certification programs.

"With our tour guides specifically they go through a rigorous training program where they shadow other employees and they have to do X amount of hours in shadowing and history and culture and then presentation to other crew mates that have given the tour before they pass all these different levels and are now officially certified. So we have like our in house certification too that our tour guides go through. Basically, that's just to train them on whether they can be like a full tour guide." O'ahu Attraction Interviewee

Ideas for Specific Job Certifications

At the conclusion of this section of the study business representatives were asked, based on the needs of their organization, in what areas if any, should job-specific certifications be offered. The top responses are highlighted in the table below.

Table 5.2. Job Certification Areas of Interest

	TOTAL
BASE	475
Service/ Hospitality / Communications	19%
F&B/ Culinary	16%
Trade certification	16%
Professional services/ Management	9%
Hawaiian culture/ history/ language	8%
Safety- OSHA/ First-Aid/ Sanitation/ HAZWOPR	7%
Technology - hardware/ software	7%
Tourism-specific	6%
Commercial driver's license	6%
Marketing	6%

Certifications related to guest/ customer service and communications was the top response at 19% followed by certifications related to food & beverage topics and trade certifications. Rounding out the top five were topics related to professional services and Hawaiian culture and language.

- Revenue Management - *"Well for me I think of revenue like our director of revenue a lot of them have been certified in some sort of revenue management. [...] It tells me that they kind of*

understand and there's different systems also in revenue and the more that they're educated in that the more cross trained that they are they have a better understanding more creative ways of trying to get more revenue." O'ahu Accommodation Interviewee

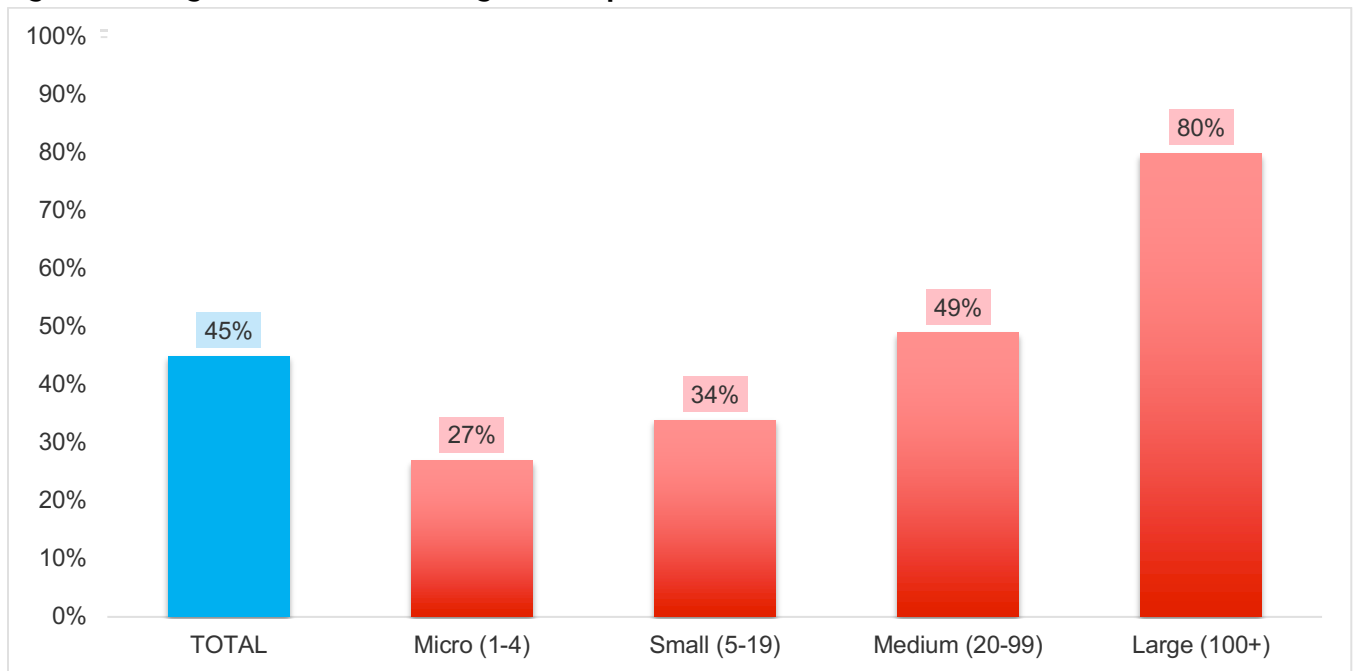
- *Soft Skills - "I think team building could be really interesting way to one, bring different cultures, people, different personality types together, in a non-combative non-threatening way. And if there's a certification on the end of that, that somebody recognizes that here in Hawai'i is held prominent, I'd serve it up all day long." Kaua'i Manufacturing Interviewee*
- *Maintenance - "So yeah, there's definitely and for the maintenance area, we could use and upgraded too. But they don't come certified. I mean, it would be nice, but we don't get any applicants that are certified." Maui Accommodation Interviewee*
- *Retail Management - "[Moderator: Are there any specific areas that certifications would be most valuable?] The retail side yeah I think what would help in the retail side is bigger picture. So understanding maybe how to run a store. Being able to analyze inventory. I guess inventory is a big one right. So inventory management. Or profit and loss you know." O'ahu/Maui Retailer/Manufacturing Interviewee*
- *Photography - "A lot of photographers just showed up, and because we don't require certification, of course. Probably nice if they can have a state level certification, because it's not easily available." Statewide Wedding Services Interviewee*

6. EMPLOYER-PROVIDED JOB TRAINING & DEVELOPMENT

DEDICATED TRAINING / DEVELOPMENT BUDGET

Each business was asked if they allocate a specific budget for formal training and/or development programs for their employees.

Figure 6.1. Budget Allocation for Training & Development



Overall, a little less than half (45%) of the businesses polled allocate a portion of their budget each year for employee training and development. The likelihood of allocating funds for these types of programs increases as companies grow in size as the graphic above points out.

- *Companies that operate in the accommodations & lodging sector at 63% were the most likely to have a formal budget allocation for the training of employees. As a point of comparison, just 28% of retailers budget for employee training and development.*

Businesses can struggle with the balance of providing quality training with both time and budget considerations. While some would prefer to be selective in employees they send to training, others prefer to do any training in-house.

“One of the challenges that we have is I have my 365 24/7 operation so when we do have these trainings even internal with my director of training trying to make or negotiate training time is difficult or putting it into the budget. [...] But, I’m investing in them to be able to be better

prepared to interact with our guests with the knowledge and the styles that I want them to have. So that does come at a cost. A little bit tricky for us.” O’ahu Accommodation Interviewee

“And the soft skills is one that I find severely lacking, unless I want to send them on to Dale Carnegie, and I’m like, it’s too expensive for me to send the group that I need to send. Or it’s too long, or what happens if they don’t commit to it? Then I wasted money, you know? So that’s where I’m looking for something a bit more flexible.” Kaua’i Manufacturing Interviewee

“There may be good programs out there, but if they are thousands of dollars we’re not going to be able to send as many people as we want to or even you know so that would be.” Statewide Accommodation Interviewee

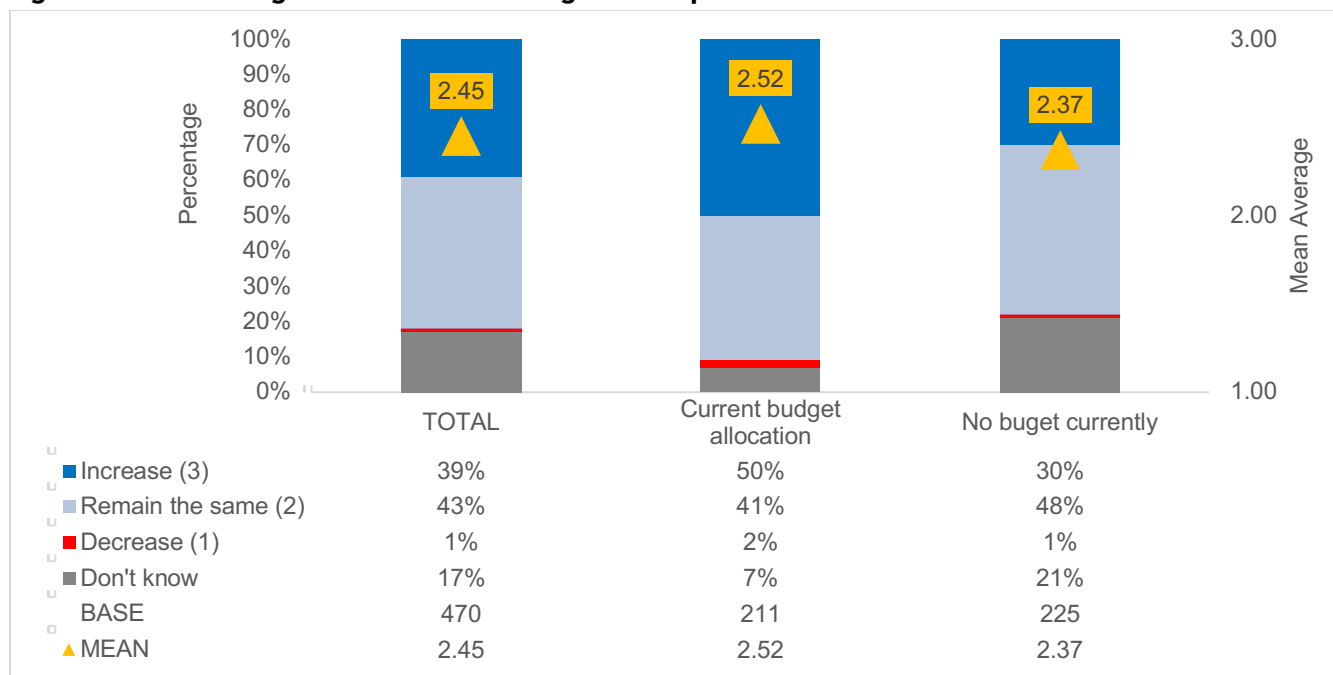
“We pay for tips training which is for responsible training. So private companies. So we do them because if we don’t do them we’re in trouble. But lot of people probably don’t do them because they don’t have the time.” Statewide Restaurant/ Professional Services Interviewee

“Honestly, I think that the tourism industry would much rather train in house. [Moderator: Okay. Why is that?] Well it’s less expensive.” O’ahu Attraction Interviewee

BUDGET FORECAST

Next, local businesses were asked if they anticipate their company’s budget to change in anyway in the next two years as it relates specifically to employee training and development.

Figure 6.2. Future Budget Allocation for Training & Development



On a three-point scale the midpoint is 2.00, using this as a baseline for no change we see a net positive overall mean score of 2.45 which signifies a likely net overall increase in the budget allocation for employee training in the coming two years amongst the firms polled.

Overall, 39% of the businesses anticipates increasing their employee training budget over the course of the next two years while 43% anticipates no change in this area. Just one percent predicts a decline in the amount they spend on employee training.

Among companies that currently have a budget for employee training, 50% expects to increase the amount of spending in this area while 41% predicts they will continue to invest in employees in a similar fashion.

Amongst firms that currently do not have a formal budget for training, a third (30%) anticipates increasing the amount they spend on training and development. Unfortunately, 48% who do not currently budget for employee training anticipates no change in the coming future.

When the results are segmented by company size, we find that larger firms are more likely to increase their training budget over the next two years than are smaller firms. Smaller firms are more likely to maintain the status quo.

Table 6.1. Future Budget Allocation Segmented by Number of Employees

	Micro (1-4)	Small (5-19)	Medium (20-99)	Large (100+)
<i>Increase (3)</i>	31%	27%	42%	61%
<i>Remain the same (2)</i>	44%	46%	45%	32%
<i>Decrease (1)</i>	2%	-	2%	2%
<i>Don't know</i>	23%	27%	11%	5%
MEAN	2.38	2.37	2.45	2.62

FORMAL TRAINING PROGRAMS CURRENTLY OFFERED

In this section of the report, business representatives were presented with the following 18 options to choose from and then asked to classify the level of availability for each one at their specific organization. The top five formal training programs based on availability are shaded for easier viewing.

Table 6.2. Formal Training Programs

	OFFERED	Available to ALL Employees	Only SELECT Employees	Would Like to Offer
<i>Directed on-the-job training</i>	91%	76%	16%	4%
<i>Employee orientation / onboarding</i>	83%	73%	10%	6%
<i>Operational / Technical training</i>	81%	39%	42%	9%
<i>Compliance training</i>	76%	51%	24%	9%
<i>Customer service training</i>	75%	51%	24%	11%
<i>Occupational safety / health</i>	74%	59%	15%	10%
<i>Soft skills training</i>	70%	41%	30%	13%
<i>Leadership training</i>	67%	22%	45%	14%
<i>Team building</i>	67%	44%	23%	16%
<i>Sexual harassment prevention</i>	62%	53%	9%	15%
<i>Harassment / Discrimination Prevention</i>	61%	54%	7%	16%
<i>Ethics</i>	60%	46%	15%	17%
<i>Anti-bias, Diversity & Inclusion training</i>	56%	45%	11%	17%
<i>Market / Industry trends</i>	56%	21%	35%	17%
<i>Sustainability and green practices</i>	54%	36%	18%	17%
<i>Mentorship program</i>	52%	22%	30%	16%
<i>Intellectual property (IP) Protection/Cyber Security</i>	52%	27%	25%	16%
<i>Hawaiian culture training</i>	40%	25%	15%	24%

Nearly all (91%) of the businesses taking part in the study offers some form of on-the-job training to all or some of their employees. The second most likely training program was employee orientation and onboarding (83%) followed closely by the 81% that offers operational and technical training. Rounding out the top five were compliance training (76%) and customer service training (75%).

The column in green highlights the proportion of businesses that offers these trainings to all of their employees as an option. In addition to on-the-job training (76%) and onboarding (73%), the training options most likely to be offered to the entire staff were related to occupational safety and health (59%), sexual harassment prevention (53%), and harassment and discrimination prevention (54%).

Skills and training programs that tend to be offered to select employees were leadership training (45%), operational/ technical training (42%), market/ industry trends (35%), mentorship programs (30%), and soft skills training (30%).

When asked what services and training opportunities businesses would like to offer the top response was Hawaiian culture training (24%).

- *The larger the company in terms of number of employees the more likely they are to offer training programs to their employees.*

Other Program Offerings Provided

Research respondents were then asked if there were any other programs they offered that were not listed in the prior section, they were then asked to describe those programs in more detail. The top responses are highlighted in the table below.

Table 6.3. Other Program Offerings

	TOTAL
<i>BASE</i>	453
<i>Job-specific/ one-on-one training</i>	13%
<i>Safety - first aid/ CPR/ driving/ occupational</i>	9%
<i>Leadership/ management</i>	5%
<i>Employee workshops</i>	5%

Thirteen percent mention job-specific training given to employees when hired or when their position responsibilities change. Nine percent listed safety-related topics/ programs.

Future Potential Offerings

In this section, those who indicate the potential for offering new programs to their employees in the future were asked to identify or describe these programs. The top responses are highlighted in the table below.

Table 6.4. Potential New Program Offerings

	TOTAL
BASE	117
Leadership/ Management	14%
Job/ Client- specific	13%
Human Resources	10%
Hawaiian Culture	9%
Safety	9%
Hospitality/ Guest relations	8%
Environment/ Sustainability	8%
Education	8%

The top program offered by this subset of the sample involved topics related to management and leadership training. Ranking just behind were more informal job or client-specific training followed by standard human resource training programs. Rounding out the top five were programs related to Hawaiian culture and those programs focused on safety measures.

Outside Resources Used for Employee Training and Development

Various programs have been used by local employers to build on skillsets for their employees. Trainings that prove to be beneficial are programs that engage participants with subject matter experts, incorporate a train-the-trainer approach, and community workshops.

"I mean I would love to, sometimes one thing I noticed at [REDACTED] is it gets a little mundane when it's the people in HR or your manager is doing the training. So they would always mix it up by outsourcing and they would have someone come from yeah. [Moderator: Why is that important to outsource and have new faces?] I think because it makes them look like the subject matter expert and it's just, it's messaged differently." Statewide Restaurant/Retailer Interviewee

"Remember, one of our O'ahu guest service supervisors took part in a really nice, once a week workshop or something about next level, customer service and culture like is said here on the third bullet, you know, incorporating that. We're happy to parcel out like just one or two people as well, and then they're expected to come back and share what they learned to some degree."

O'ahu/Hawai'i Island Attraction Interviewee

“We did do that working with aloha. We’ll repeat that on a regular basis because we’re in a service industry and because we’re people working with people that level of respect and responsibility I think is important. A member of our team brought it to us and it was a workshop that I guess the community was offering.” O’ahu Attraction Interviewee

The Hawai’i Employers Council was mentioned frequently as a resource utilized by businesses for training on specific topics.

“I’ve used Hawai’i Employers Council a lot back in my day. We’re not a member here at [REDACTED], but they were great kind of on a pinch because they would just come and just do it. Again, it was nice to not be that one person training on every single thing so it was nice to show someone else come and do that training for them.” Statewide Restaurant/Retailer Interviewee

“Hawai’i Employers Council right is a resource for a lot of companies here for training. So compliance training for harassment, diversity, manager training, safety so CPR training. They also expanded with an online learning LMS system. So they offer a lot of online courses.” O’ahu/Maui Retailer/Manufacturing Interviewee

“So I think, on that fourth bullet point, that’s where we’re going to need to focus to try to do our managers with a time management supervisory skills. But that’s all available to us right now through Hawai’i Employers Council.” Maui Accommodation Interviewee

Leadership programs used can vary from sending employees to external programs to hosting training internally through various classes with outside trainers.

“Leadership Works is one that we’ve used. Then you know there’s some that are funded right the EFT has funding for certain trainings, but it’s not necessarily specific to the tourism industry. The ones that are, are mostly through KCC or like I said through the random ones that NaHHA does. [...] So again depending on what industry you’re looking at or where you’re located there’s a lot out there. I don’t know if they’re all, there’s one place to look for them.” Statewide Tour Interviewee

[In reference to Glen Furuya] “I’ve gone to a couple of courses that he held a long time ago though. But his focus is like the combination of leadership training, but he has Hawaiian and also local. In the past I would always send, if it was available because it wasn’t cheap. [...] Have had a lot of good feedback from the managers that have gone. [Moderator: What makes it successful in your mind?] I think because it was specific, he understood the local culture.” Statewide Accommodation Interviewee

“So we do definitely need the ongoing management, training. So we do some internally, and then we’ll bring in outside people. In fact, we’re doing one in August, for our executive management team on how do--well it’s kind of a leadership class.” Statewide Transportation Interviewee

Island-specific nuances must be considered when building training curricula. Doing so can ensure that unique perspectives are captured and reflected in the training in order to better resonate with participants.

“[Moderator: What do you think we could do to adjust for those island specific nuances?] Yeah well I guess you got to get somebody from that particular island who has that perspective to develop the curriculum and the training and the awareness to point out the differences [Moderator: Why would that be valuable?] Because you want to be a part of the community not an outsider. I think if you’re part of the community customer service gets better, food tastes better.” Statewide Retailer Interviewee

EXAMPLES FROM OTHER MARKETS / INDUSTRIES

“You know I’m just thinking about these are cohort type situations. So I really like what Mana Up, this is in Hawai’i though, is doing. You know they’re taking individual local productions, retailers and helping give them the skills and then connecting them with past ones so like a mentorship right.” Statewide Tour Interviewee

“I’d love to see some cohorts of you know being developed for leadership training. Local talent, native Hawaiian talent that were taken under.” O’ahu Accommodation Interviewee

“Toastmasters is something that I wish we had on Kaua’i, I have not found it yet.” Kaua’i Manufacturing Interviewee

“So IT you got special, you have Pacxa now which does their own training.” Statewide Workforce Development Interviewee

“So I was just talking to [REDACTED] these certification service with Cornell, the partnership with HTA and DOE and Cornell to produce a like, it’s nine modules, and it’s a 45 minute online type of trainings. There’s one segment with Aloha, and what it means and then it goes into other leadership training. So it was really meant for high school students, and I think about 800 or so, completed the training, you get a certificate from Cornell. So when I saw that I thought--oh, this is perfect for our newly promoted manager.” Maui Accommodation Interviewee

"I mean the one that pops up at the top of my head I've already shared is I think that Disney has a really good program for providing customer service and I know that it's deeply engaging and enriching and held to a very high standard with very specifics. I think that they are a great example to use for anything no matter the industry as far as training programs." O'ahu Attraction Interviewee

"I think customer service, the Disney kind of training would be wonderful. We keep looking around for that kind of training for a lot of our front-line people so I would look for that. I mean I've sent my team out to Kualoa Ranch because I observed cool things." O'ahu Attraction Interviewee

"So Ceridian they're a worldwide company, they're a payroll company and once a year they pull all their different clients together. [...] But the topics that they cover you know everyone goes to seminars and one day trainings or you know five day trainings, but if Hawai'i could pull all the employers and we do have bits of that, but I think it's that one message I guess Hawai'i Tourism you know having an annual and they probably do, but an annual where are we going. [...] So definitely a training maybe at the practitioner level where you can you know go back and put it into practice." O'ahu/Maui Retailer/Manufacturing Interviewee

TRAINING FORMAT - INFRASTRUCTURE FOR VIRTUAL TRAINING

Next, businesses were asked if they have the necessary equipment and/ or office space to enable virtual training.

Table 6.5. Resources for Virtual Training by Company Size

	TOTAL	Micro (1-4)	Small (5-19)	Medium (20-99)	Large (100+)
BASE	436	99	133	130	74
Yes, for all employees	43%	52%	45%	35%	43%
Yes, for some employees	36%	19%	24%	48%	51%
NET	79%	71%	69%	83%	94%
No	22%	29%	31%	17%	5%

Overall, 79% of the businesses responding to this question say they have the capability to offer virtual training sessions to at least a portion, if not to all, of their employees. Forty-three percent believe they can conduct virtual training for all of their employees while 36% say this is feasible for at least some of their staff members.

- *As companies grow in size so too does the likelihood that they can offer virtual training to staff members. Micro and small businesses were less likely have these capabilities.*

- Businesses that operate entirely on the island of O’ahu were the least likely have the ability to virtually train their employees at 28%.
- When segmented by industry, retail (35% cannot) and restaurants (49% cannot) were the least likely to be able to virtually train employees.

Table 6.6. Virtual Training by Industry

	TOTAL	Accommodations	Attractions/ Recreation/ Entertainment	Food & Beverage/ Restaurant	Retail	Professional Services	Transportation/ Tour Operator
BASE	436	62	65	47	51	77	28
Yes, for all employees	43%	39%	38%	21%	35%	61%	46%
Yes, for some employees	36%	52%	38%	30%	29%	26%	32%
NET	79%	91%	76%	51%	64%	87%	78%
No	22%	10%	23%	49%	35%	13%	21%

- When segmented by industry, we find that professional services are more likely than food and beverage/ restaurants to have virtual training available for all employees. Conversely, food and beverage/ restaurant and retail businesses are much more likely to not offer virtual training to their employees, when compared to accommodations and professional services businesses.

Businesses that prefer online trainings like the flexibility and accessibility that virtual offers.

“I think that can be beneficial as well, or having prepackaged group of classes, that you could have your staff go through maybe on a online type system. So you get the skills here and if it's a soft skill or technical skill, meaning they have to learn Word or Excel, or that kind of thing. Then I can get them the program for that, but you know, that's where I would love to have other resources to tap into.” Kaua’i Manufacturing Interviewee

“You know the Hawaiian culture I think that there’s an opportunity to offer some sort of training for anybody that would be willing to, maybe even virtual nowadays right.” Statewide Transportation Interviewee

“So I would like us now that we’re bringing on this new HCM system to implement an annual sexual harassment prevention training even if it’s online and they go in and they spend their 30 minutes and then they’re done.” Statewide Restaurant/Retailer Interviewee

Some businesses recognize that while virtual works for some of the workforce, it does not work or is not preferred by all.

“We have a couple of partners that we’ve been using. So we’ve been a member of Hawai’i employer council for probably 20 plus years or so. We have used their programs that they have in place, either virtually or in-house.” O’ahu Attraction Interviewee

“You got to have virtual, you need to have. You need to have not on a paper is the right word but you need to have you know something they can download, you got to have in person, you got to have group, you got to have individual. [...] I mean I think how great we’ve become at virtual is awesome and we shouldn’t lose that, but we need to have a balance. But I think some people want to swing all the way back to in person all the time.” Statewide Restaurant/ Professional Services Interviewee

Other businesses have experienced limited participation for virtual trainings, or cite preferences for in-person training, despite challenges.

“Yeah, the virtual, I’ve done some of that. I’ve tried to reach out even pre-COVID. It’s just not the same. Like we’re always about open communication, and we’re like - okay, we’re gonna do it quarterly. Then nobody really signs up on our own team who loved the training, so it’s just not the same online.” O’ahu/Hawai’i Island Attraction Interviewee

“Yeah, I mean, I think if we could bring the training together, so that there’s more opportunity for employee - our managers to attend this versus webinars, you know, that’s all at their own pace. If we can have the classes here. But right now, it’s just been so difficult, because everybody short staffed, everybody’s working at floors, it’s been difficult to bring our managers together for this kind of training.” Maui Accommodation Interviewee

INVESTMENT IN LONG TERM EMPLOYEE CAREER DEVELOPMENT & RETENTION

Those businesses taking part in the study were then asked if their company invests in long-term employee career development and retention.

Table 6.7. Investment in Long-term Training & Development by Company Size

	TOTAL	Micro (1-4)	Small (5-19)	Medium (20-99)	Large (100+)
BASE	449	101	138	132	78
Yes	54%	42%	44%	61%	74%
No	46%	58%	56%	39%	26%

Half (54%) indicate that the business that they represent makes investments in their staff as far as career development and employee retention were concerned. The data shows that such capital outlays are usually more likely to occur as companies grow in size.

- *Businesses that operate entirely on the island of O’ahu (45%) were less likely to invest in their employees seeking career growth and retention than were those businesses that operate solely on a Neighbor Island (61%).*

Steps Taken for Development & Retention

Those businesses that do invest in their employees in terms of career development and retention were asked to detail the steps they have taken to accomplish this goal. The top responses are highlighted in the table below.

Table 6.8. Training & Development Programs

	TOTAL
BASE	239
Mentoring/ training/ coaching	38%
Increased benefits	16%
Professional development	12%
Tuition assistance	11%
Pay increases/ bonuses	11%
Promotions/ advancements	10%
Classes/ seminars/ workshops	7%
Growth opportunities	5%
Awards/ recognition	5%

A little over a third (38%) of this subset of the sample has a mentoring program for employees while 16% provide increased benefits to help to ensure employee satisfaction. Twelve percent offer professional development opportunities while 11% provide tuition assistance if an employee qualifies. Another 11% says they offer pay increases and bonuses to help keep employees happy while 10% feel that promotions are part of this equation as well.

OBSTACLES TO FORMAL TRAINING PROGRAMS

Research respondents were presented with a list of possible obstacles to offering training and development programs to their employees and then asked to select all those that apply to their own businesses.

Table 6.9. Obstacles to Formal Training Programs by Company Size

	TOTAL	Micro (1-4)	Small (5-19)	Medium (20-99)	Large (100+)
<i>BASE</i>	437	99	133	131	74
<i>We are too short staffed and work needs to get done</i>	60%	47%	65%	62%	64%
<i>We do not have budget for training</i>	30%	40%	34%	26%	16%
<i>No barriers</i>	18%	20%	14%	21%	20%
<i>We need hands-on training and that is not possible during the pandemic</i>	17%	15%	16%	15%	23%
<i>Other</i>	14%	14%	14%	13%	14%
<i>Training courses are too long - we cannot allocate enough time for the training</i>	13%	16%	12%	14%	9%
<i>We reduced our office space and now do not have enough physical space to do in-person training</i>	6%	7%	7%	5%	5%
<i>Other COVID-19 / pandemic related issues</i>	6%	5%	5%	6%	9%

Nearly two-thirds (60%) of those who responded to this question agrees that one of the barriers to offering more training and development opportunities to employees is that they are simply too short-staffed at the moment to devote resources in this area. Ranking a distant second were the 30% who feel that the lack of available funding was a primary deterrent. Rounding out the top three were the 17% who said training is difficult due to pandemic restrictions.

The lack of funding for additional job training is more of an issue for smaller sized firms.

- One in five (20%) businesses that allocates funding in their budget for training indicate that the hands-on type of training that's needed is not possible due to the pandemic.

INTERNSHIPS

Currently Offered by Employers

Next, research respondents were asked if the company they are representing currently offers internship programs or apprenticeships to students interested in a career in the visitor industry.

Table 6.10. Offers Internship Programs by Company Size

	TOTAL	Micro (1-4)	Small (5-19)	Medium (20-99)	Large (100+)
BASE	444	99	137	130	78
Internship program	38%	19%	34%	39%	69%
Apprenticeships	24%	15%	25%	20%	38%
NET	41%	22%	38%	43%	69%

Overall, 38% of the businesses say they offer internships to students interested in the visitor industry. One in four (24%) has an apprenticeship program that is currently in place. Combined, 41% of the businesses offer a combination of an internship and/or apprenticeship program.

Larger sized firms were more likely to offer internship and/or apprenticeship opportunities to students interested in a career in the visitor industry. These opportunities are less likely to be available amongst smaller sized firms.

- When segmented by industry we find those in the accommodations & lodging (55%) and attractions, recreation, & entertainment (50%) sectors the most likely to offer internships to students interested in the visitor industry. At the opposite end, those in the retail sector at 17% were the least likely to offer internships at the time of the study.

Many businesses find internships to be a great recruiting resource for their workforce pipeline. They see it as an opportunity to showcase what the overall industry has to offer, but also a time to instill good work ethic and job-specific skills.

"I think internships are a great way to show a college student how broadly we look at their capabilities." O'ahu Attraction Interviewee

"And the internship programs are the best, and I think that I can't speak for my colleagues. But my sense is, is that they'd be very open to making available internships to potential workers, because it's just a good thing all around. It's a good experience, even if somebody decides they don't want to be in this industry." O'ahu/Hawai'i Island Events Interviewee

"We also have an internship program with Outrigger so between that and the mentoring it's a great combination." O'ahu Accommodation Interviewee

"So what we've done is we just help where we can and what we offer is an internship program. [...] We pay them and we leave the door open for them to work if they want. [...] Maybe they leave and come back, but also hopefully they have a good experience and they tell their friends and more kids get into the culinary program which is good for the whole state and then maybe we get some too. So that's kind of what it is. It's successful." Statewide Restaurant/ Professional Services Interviewee

"Anytime you can get an intern in, and they teach them about your company and our work on things, you get a good opportunity to meet with them. Maybe they might be interested in some of the things that they're working on. They can come and work for us afterwards." Statewide Transportation Interviewee

"Always side by side with one of our staff, but it was a good opportunity. To be honest with you, several of those people who were in internship program after they graduated became [REDACTED] employees. We knew their work ethic, we knew that they showed up on time, they had the right personality, and they actually showed us what they could do and so they ended up being absorbed into our 'ohana." O'ahu Accommodation Interviewee

"We need the you know apprentices and the internships to be able to commit to a day or two or three to go out into the field. We can do that in the summertime when they're off school, but when they're in school it becomes more difficult." Statewide Events Interviewee

Barriers to Offering Internships Specifically

Next, those businesses that do not currently offer internship programs to students were asked why this was. The top responses are highlighted in the table below.

Table 6.11. Barriers to Internship Programs

	TOTAL
BASE	273
Not applicable- not directly in the visitor industry	17%
Business is too small	13%
Staffing shortage- no resources	13%
Budget constraints	11%
Industry/ business not suited for interns	9%
Offers internships but not in visitor industry	8%
Not aware of this requirement	6%
Not interested in participating	5%

Among some of the excuses given were that they were not directly tied to the visitor industry, that their business was too small and/or lacked the resources to house an intern, that their industry or type of work was not suited for interns, and that they were simply unaware of this requirement.

INTERNSHIPS - AWARENESS OF REQUIREMENT TO GRADUATE

Each respondent was presented with the following:

Were you aware, prior to this survey, that post-secondary hospitality programs usually require students to participate in an internship as a requirement of graduation?

Table 6.12. Awareness of Internship Requirement by Company Size

	TOTAL	Micro (1-4)	Small (5-19)	Medium (20-99)	Large (100+)
BASE	446	101	137	130	78
Yes	33%	30%	24%	32%	54%
No	67%	70%	76%	68%	46%

A third (33%) of business representatives responding to this question were aware of the internship requirement prior to taking part in the study. The level of aided awareness of this internship requirement is highest amongst larger sized firms.

- *When segmented by industry we find those in the accommodations & lodging sector with the highest aided awareness of the internship requirement at 58%. As a point of comparison, just 23% of those in the professional services and retail sectors were aware of this prior to the study.*

7. HAWAII TOURISM AUTHORITY

PROGRAMS - SPONSOR/SUPPORTER

Awareness

In this section of the study, business representatives were asked if they were aware of the following programs prior to taking part in the study.

Table 7.1. Awareness of HTA Sponsored Programs

BASE = 420	Aided Awareness
<p>Native Hawaiian Hospitality Association (NaHHA) Cultural Training HTA provides support to NaHHA to bridge the gap between the Hawaiian community and the visitor industry. NaHHA offers cultural training and consultation to individuals and organizations to learn and incorporate Hawaiian culture, values, and traditions.</p>	43%
<p>Hawai'i AgriTourism Initiative HTA partners with GoFarm Hawai'i, Hawai'i AgriTourism Association, and the O'ahu Resource & Development Council to grow agritourism experiences through the Hawai'i AgriBusiness Guidebook and Hawai'i Agri-Tourism Webinar Series.</p>	32%
<p>Sustainable Tourism Management with the Sustainable Tourism Association of Hawai'i HTA partners with the Sustainable Tourism Association of Hawai'i (STAH), which protects Hawai'i's natural environment and host culture through the promotion of responsible travel and educational programs relating to sustainable tourism for residents, businesses and visitors. STAH focuses on its Sustainable Tour Operator Certification Program, Tour Operator/Tour Guide Training Program, and Educational Outreach/Partnership Development.</p>	32%
<p>Campaign for a Safer Community with Ho'ōla Nā Pua An initiative to combat sex trafficking in partnership with Ho'ōla Nā Pua, a Hawai'i nonprofit working against sex trafficking, the campaign included symposiums held across the state aimed at empowering Hawai'i's visitor industry management and others to take a stand against trafficking.</p>	25%
<p>Customer Service In Hawai'i Training Program</p> <ul style="list-style-type: none"> • Certificate of Professional Development (for non-tour guides) • Certificate for Hawai'i's Professional Tour Guides (for tour guides) <p>HTA partners with the University of Hawai'i Kapi'olani Community College to provide the Customer Service in Hawai'i training program which is designed for employees in service-related industries. The program's foundation is based on Hawaiian culture. It is focused on developing practical skills that help to provide memorable service experiences for customers. This program also serves as the training pathway and exam preparation for the Certification for Hawai'i's Professional Tour Guides.</p>	25%
<p>Hawai'i Department of Education's Career & Technical Education (CTE) program Launched in 2020, this program provides high school students with Service Excellence Certificate of Achievement. The curriculum was exclusively developed in partnership with ClimbHI and the School of Hotel Administration at the Cornell SC Johnson College of Business, one of the leading hospitality administration programs in the world.</p>	22%
<p>L.E.I. (Leadership, Exploration, Inspiration) Program This program on O'ahu, Maui, Kaua'i and the island of Hawai'i brings more than 1,000 teens from throughout the state in direct contact with hotels, businesses, and tourism industry leaders. In the program, the future engages the present.</p>	21%
<p>Certified Festival and Event Executive (CFEE) Program HTA partners with the International Festivals & Events Association (IFEA) to provide the CFEE program. The core education curriculum includes Non-Sponsorship Revenue, Project Management, Operations/Risk Management, Marketing & Media Relations, Administration & Management, Sponsorship/Sponsor Service.</p>	20%

The results from this section of the study reveal relatively low aided awareness of most of the programs that HTA supports that were tested here. Native Hawaiian Hospitality Association Cultural Training program had the highest aided awareness at 43%. The remainder had aided awareness numbers amongst a third of the sample or less.

- *41% of businesses who indicate the visitor industry is a secondary or indirect source of revenue for their firm had not heard of any of the eight programs tested prior to taking part in the study.*
- *Larger firms of 100 or more employees were more likely to have heard of Hawai'i Department of Education's Career & Technical Education program and L.E.I prior to taking part in the study than were firms with fewer than 100 employees.*
- *Companies that operate in the accommodations & lodging sector were the most likely to have had prior awareness of the L.E.I. program and the Native Hawaiian Hospitality Association Cultural Training.*
- *Those businesses that operate in the professional services sector (42% not heard of any), retail (47% not heard of any) and the F&B/ restaurant sector (49% not heard of any) were the least likely to have heard of the eight programs being tested.*
- *Businesses that formally allocate funding for employee training were more likely to have prior awareness of the following: Hawai'i AgriTourism Initiative, Sustainable Tourism Management with the Sustainable Tourism Association of Hawai'i, Customer service in Hawai'i Training Program, and Hawai'i Department of Education's Career & Technical Education Program.*

Interest/Participation

In this next section we measure the level of interest in each of these HTA sponsored programs amongst businesses taking part in the study.

Table 7.2. Level of Interest in HTA Sponsored Programs

	Interest in Program
<p>Native Hawaiian Hospitality Association (NaHHA) Cultural Training</p> <p>HTA provides support to NaHHA to bridge the gap between the Hawaiian community and the visitor industry. NaHHA offers cultural training and consultation to individuals and organizations to learn and incorporate Hawaiian culture, values, and traditions.</p>	68%
<p>Sustainable Tourism Management with the Sustainable Tourism Association of Hawai'i</p> <p>HTA partners with the Sustainable Tourism Association of Hawai'i (STAH), which protects Hawai'i's natural environment and host culture through the promotion of responsible travel and educational programs relating to sustainable tourism for residents, businesses and visitors. STAH focuses on its Sustainable Tour Operator Certification Program, Tour Operator/Tour Guide Training Program, and Educational Outreach/Partnership Development.</p>	61%
<p>Customer Service In Hawai'i Training Program</p> <ul style="list-style-type: none"> • Certificate of Professional Development (for non-tour guides) • Certificate for Hawai'i's Professional Tour Guides (for tour guides) <p>HTA partners with the University of Hawai'i Kapi'olani Community College to provide the Customer Service in Hawai'i training program which is designed for employees in service-related industries. The program's foundation is based on Hawaiian culture. It is focused on developing practical skills that help to provide memorable service experiences for customers. This program also serves as the training pathway and exam preparation for the Certification for Hawai'i's Professional Tour Guides.</p>	57%
<p>L.E.I. (Leadership, Exploration, Inspiration) Program</p> <p>This program on O'ahu, Maui, Kaua'i and the island of Hawai'i brings more than 1,000 teens from throughout the state in direct contact with hotels, businesses, and tourism industry leaders. In the program, the future engages the present.</p>	57%
<p>Hawai'i Department of Education's Career & Technical Education (CTE) program</p> <p>Launched in 2020, this program provides high school students with Service Excellence Certificate of Achievement. The curriculum was exclusively developed in partnership with ClimbHI and the School of Hotel Administration at the Cornell SC Johnson College of Business, one of the leading hospitality administration programs in the world.</p>	54%
<p>Certified Festival and Event Executive (CFEE) Program</p> <p>HTA partners with the International Festivals & Events Association (IFEA) to provide the CFEE program. The core education curriculum includes Non-Sponsorship Revenue, Project Management, Operations/Risk Management, Marketing & Media Relations, Administration & Management, Sponsorship/Sponsor Service.</p>	50%
<p>Hawai'i AgriTourism Initiative</p> <p>HTA partners with GoFarm Hawai'i, Hawai'i AgriTourism Association, and the O'ahu Resource & Development Council to grow agritourism experiences through the Hawai'i AgriBusiness Guidebook and Hawai'i Agri-Tourism Webinar Series.</p>	47%
<p>Campaign for a Safer Community with Ho'ōla Nā Pua</p> <p>An initiative to combat sex trafficking in partnership with Ho'ōla Nā Pua, a Hawai'i nonprofit working against sex trafficking, the campaign included symposiums held across the state aimed at empowering Hawai'i's visitor industry management and others to take a stand against trafficking.</p>	45%

Although prior aided awareness was relatively low as measured in the prior section, interest in the programs being tested was much higher. Six of the eight programs received interest from over half

of the businesses polled. The program with the highest level of interest was the Native Hawaiian Hospitality Association Cultural Training at 68%.

The level of interest in all of the programs tested is statistically higher amongst larger firms of 100 or more employees.

Those in the accommodations and lodging sector have the most interest in the following programs: Native Hawaiian Hospitality Association Cultural Training, Sustainable Tourism Management with the Sustainable Tourism Association of Hawai'i, Customer Service in Hawai'i Training Program, and Hawai'i Department of Education's Career & Technical Education Program.

PERCEIVED ROLE OF HTA

Each respondent was then asked to describe the role they see HTA fulfilling as far as workforce development in the visitor industry was concerned. The top responses are highlighted in the table below.

Table 7.3. Role of HTA in Workforce Development

	TOTAL
<i>BASE</i>	411
<i>Training/ certifications/ internships/ apprenticeships</i>	9%
<i>State funded organizational support of the visitor industry</i>	7%
<i>Advocate for workforce development for visitor industry</i>	7%
<i>Promote sustainability, cultural sensitivity, environmentally conscious</i>	6%
<i>Liaison between business and the educational system</i>	6%
<i>Facilitator - community, businesses, Native Hawaiians, visitor industry</i>	5%
<i>Workforce issues</i>	5%
<i>Don't know</i>	17%

When businesses are asked about the role they feel that HTA should play in terms of workforce development suggestions such as the sponsoring of training and certification programs along with facilitating or offering internship and apprenticeship programs was the top response.

Other like the idea of the organization acting as a focal point to bring together various stakeholders to solve issues related to the visitor industry well beyond just workforce needs.

Several feel the organization should take the lead in promoting cultural sensitivity, sustainability, and making tourism and the industry in general more environmentally conscious.

Many businesses look forward to the collaboration that the workforce needs assessment may bring to the visitor industry. While they look to HTA to be involved in the effort, they believe it necessary for all organizations to have a stake.

"These are topics that we think about, but we think about them in isolation from the rest of the community. It's interesting to know that Hawai'i Tourism Authority is thinking about it more broadly and there are things that we can do better together. It will take me a long time to get to where I envision being with our team. That would be shortened if other people were working on the same path." O'ahu Attraction Interviewee

"Maybe it's happening, but I think we need to have better coordination amongst all the organizations, all the different industries. So that we understand what the strategies are overall to Hawai'i for in a more coordinated way...it can't be just HTA, isolated HTA, we need to do a better job of so we need HTA in connecting with our community, and not necessarily just tourism, but outside of tourism too." Statewide Workforce Development Interviewee

"I think the most promising thing I see is that the industry is starting to work on this, looking at it from a total perspective. Not only the hospitality side, but it's all tied in businesses that make the visitor industry successful. So I think, again, that's part of the HTA's direction, in terms of making sure that the entire community is benefiting from the visit industry." Statewide Transportation Interviewee

"I will say it's refreshing to hear that they are doing the legwork necessary to get a good understanding from the industry professionals and workforce that is currently out there and what their thoughts are on this whole experience and ways that they can improve. I sincerely appreciate that." O'ahu Attraction Interviewee

"Well it's interesting HTA is looking into this. Maybe and this is just commentary that rather than HTA trying to tackle workforce development I think it's the employers role to do that. So HTA should focus on the employers and make them do it. Put their energy into that because I think you'll get more mileage that way. Otherwise, employers are saying well I'll just dish it off to this other organization because they're going to teach them the skills." Statewide Retailer Interviewee

“Are we going to continue to drive our population towards service industry jobs or are we going to help them see the broader picture and are we going to make service industry jobs more viable, more educational. I mean I think you can plan for that. That’s all part of destination management. Your docent is creating the experience for the person. So I’m waiting to see what comes next because we would gladly participate in that.” O’ahu Attraction Interviewee

Some businesses say they look to HTA as a resource for receiving relevant industry information or hosting learning opportunities for leaders.

“We would probably pay attention to HLTA or even HTA. Through our membership, like there is an opportunity, there is always a communication and we pay attention. So not only to the HR but maybe all the managers should receive the information. So if they think it’s a good opportunity, and then they can bring it up. Sometimes HR is too busy, that they don’t want to do anything new.” Statewide Accommodation Interviewee

“You know probably not the job specific, but from HTA’s standpoint I could see them doing some cool workshops for us either via Zoom or on island you know that always kind of give us that opportunities to learn and grow and enhance our operations with some of the knowledge that they can provide us as leaders of our organizations.” Kaua’i Attraction Interviewee

Other businesses would like to see HTA do more to help the overall economy of the state, not related to workforce.

“I think the general theme that would help HTA is if they look at themselves as an entity that helps Hawai’i’s economy by doing these things. You know not just giving money back in taxes, but actually being part of the like housing, being part of the food production.” Statewide Workforce Development Interviewee

“We were talking earlier, I said - we don’t need studies, we need bodies. Because I think there are a lot of - you can correct me if I’m wrong, but I think there are a lot of training resources already available at the community college level. We just don’t, you know, we’re farming those resources.” Maui Accommodation Interviewee

8. LOOKING TO THE FUTURE

Businesses are optimistic about the future of the visitor industry here in Hawai'i, however they recognize there is still work to be done, with education of the workforce at the core.

"I think it's an exciting time. It's an opportunity to renew and refresh the way that we've been doing things for many, many years. It's an opportunity to kind of step our game up a little bit and you know try something new and try something on a more educated and trained basis and do better than the average is doing." O'ahu Attraction Interviewee

"These need to be institutionalized within the organization. Just having external training is a snapshot in time and once that snapshot in time is gone so what everybody goes back to their normal life or their whirlwind life that we go back into the hotel and how much of that is actually retained, how much of that is actually put into practice without finding ways to support the shifts that need to happen both before they get into the industry and also while they're in the industry." O'ahu Accommodation Interviewee

"I mean my dream is that I mean what I've been talking about this entire time is I really want the visitor industry employee to understand how special Hawai'i is. [...] So I'm looking forward to regenerative tourism, sustainability to be pushed forward where we're able to scale regenerative activities. The sense of place and who we are as a culture is just fundamental to how we engage with our visitors." O'ahu Accommodation Interviewee

"So, I think if it does shrink back a little bit, it's an opportunity to have higher quality, better trained people that are actively working in the industry. But again, it's not going to get there automatically. So it's going to take, I think, combined efforts of the whole educational system, the companies involved, and everybody to put in the effort to create that better overall position job for the industry." Statewide Transportation Interviewee

"I think what we're also going to say just my view on it is, with all this emphasis on trying to get a better skilled workforce. The upscaling and rescaling are a new skill, I think you're going to have a much more skillful workforce. You're going to be much more mindful than before, they're not after it just for a buck. They're there because they actually have passion towards the company they're working for, and the place where they work." O'ahu Attraction Interviewee

"Currently the industry is not very - the parents don't like their children to go into the industry. We need to change that perception." Statewide Accommodation Interviewee

Many businesses feel the pressure the future may hold for their organization and would like to prepare for the unknown. They desire a better understanding of market and industry trends, changes in technology and how they can best shift from their current standards of practice to what is still yet to be revealed.

"The market and industry trends I always think that we have some things available to us now that I think being able to understand now especially as the market changes even more rapidly and without precedent in many cases you know as we come out of the peak of a pandemic it's really difficult to understand to predict what will happen next. As much data and understanding that we can have on that I think will help the whole industry's you know health in terms of being able to ride this out and be prepared for what's the next thing and how do we ride that out too because I think it took so many of us by surprise and caught us unprepared." Statewide Transportation Interviewee

"I think we're trying to all find the balance and sustainable tourism. So we're trying to find a balance of what makes sense not only for local people, but those coming in. You know taking care of our community and also the future for our children. So I think there's a lot of decisions that are being made right now for the next 40, 50 years." Statewide Transportation Interviewee

"Yeah, I think dealing with the virtual world and artificial world or artificial intelligence, parts of it. Hawai'i's pretty isolated from becoming in an AR run, or we're just still have a lot of automation going on. And I think we're dealing with people who are coming from this industry. Yeah. I think we have to learn how to flex to that mindset." O'ahu Attraction Interviewee

"For me, I hate seeing automation come into hospitality. But that's what's going to happen. If we can't count on employees to be here, we're going to be in a position where we're just working behind computers. Sending them out their check ins, and sending him out their fees. On their phones, and they'll have very, very little interaction with desk clerks and that kind of stuff." Kaua'i Accommodation/Attraction Interviewees

"But, realistically we do not have the workforce that can continue to staff at the levels we do and so again I see a shift from teaching somebody how to turn a room or make a bed to teaching somebody how to program the robot to service the room or to deliver room service or to do whatever and that gets all back to technology right." Statewide Accommodation Interviewee

"I think we're going to have to shrink the workforce and just learn to do more with less you know." O'ahu Manufacturing Interviewee

Businesses recognize the significant shift in strategy for the future workforce cannot be accomplished alone and point to various entities that can help to push forward these changes.

“The other thing I would want to know is, what are other companies doing with their orientation process? How are they letting their new hires? We go through a pretty extensive three-day, or two-day program. I would like to know what other companies are doing to their new hires. On how they're introducing culture or their company history, if they're even doing it at all, that would be interesting to learn.” O’ahu Attraction Interviewee

“[Moderator: Who else is involved in workforce development in Hawai’i?] Well the Chamber. [...] The county workforce development boards, University of Hawai’i. [Moderator: And who specifically within the University of Hawai’i do you see most relevant to the visitor industry?] Well probably Shidler you know the TIM school, but they haven’t been active with us. We have [REDACTED] who represents [REDACTED] sitting on our board, but it doesn’t percolate into the TIM school. Now TIM just got transferred to Shidler right.” Statewide Workforce Development Interviewee

“I think we need more people at the table. You know Department of Education, our university system, our language schools, our communities that you know are this is part economic development. I just think this is not a visitor industry issue. This is really government and everybody coming together and really understanding like what you’re doing.” O’ahu Accommodation Interviewee

“Would be interesting if the state could set up something at the convention center where once a month sexual harassment training the first week and every month second classes right. Second financial training the second week. Third week OSHA safety. Four week whatever your top four things right. [...] You know paid for by the state come on right the TAT again.” Statewide Restaurant/ Professional Services Interviewee

APPENDIX

QUANTITATIVE SURVEY: PROFILE OF SURVEY RESPONDENTS

	OVERALL	COMMENT
COUNTY		
Honolulu	57%	
Hawai'i	33%	
Maui	28%	
Kaua'i	24%	
Moloka'i	7%	
Lana'i	6%	
JOB TITLE		
Owner	47%	
General Manager	16%	
Other	15%	
BP/ Director/ Manager	12%	
Human Resources	10%	
INDUSTRY SECTOR		
Professional services	19%	
Other	18%	
Accommodations/ Lodging	14%	
Attractions/ Recreation/ Entertainment	13%	
Retail	12%	
F&B/ Restaurants	10%	
Transportation/ Tour Operator	7%	
Agritourism/ Farm/ Ranch	4%	
Visitor Industry Support	2%	
EMPLOYEES		
Micro (1-4)	29%	The typical business that took part in the study has been in business 13 (median) years.
Small (5-19)	25%	
Medium (20-99)	17%	
Large (100+)	5%	
MEAN	97.12	
MEDIAN	13	
YEARS IN BUSINESS IN HI		
< 10 Years	16%	The typical business has operated in Hawai'i for 25 (median) years.
11-19 Years	23%	
20+ Years	62%	
MEAN	29.96	
MEDIAN	25	
VISITOR INDUSTRY		
Primary business	41%	Two in five businesses polled indicate their business is primarily involved in the visitor industry.
Serve some visitors	31%	
Support business in industry	28%	

QUANTITATIVE SURVEY QUESTIONNAIRE

The Hawai'i Tourism Authority (HTA) is conducting an assessment of the current and future workforce needs of Hawai'i's visitor industry and related sectors. This initiative is a part of HTA's 2020-2025 Strategic Plan, supporting our Community pillar to build a resilient visitor industry workforce and community.

We are asking for your kōkua by participating in this online survey by [Date]. Your input will help to inform HTA, our fellow agencies, counties, educational institutions, and workforce organizations across the state. **To encourage participation and show appreciation for your time, anyone who completes this survey is eligible to enter a drawing to receive one of five \$250 gift cards, provided by Anthology Research. Those who completed the survey before the drawing was announced will be eligible, so please do not complete the survey more than once.**

- **Which types of organizations should take this survey?**

If you are receiving this invitation, we would like to hear from your company or non-profit organization. All companies that do business in Hawai'i are connected in some way to the visitor industry—whether directly or indirectly—so we hope you will share your company's perspective. For the purposes of this survey, we are using the term "company" to include all employer organizations.

- **Who should complete this survey?**

This survey should only be completed once per company, by an individual (senior human resources representative, president, executive director, general manager or owner) with first-hand knowledge of your company's workforce practices and policies, including hiring and training. If there is another person at your company who should be taking this survey, please forward this message on to them.

- **Why is this survey being done?**

HTA seeks to obtain information and data to help determine the type of skills and training (including workshops / classes) that are needed in Hawai'i's visitor industry. The results of this research will help to ensure the right training, classes and programs are being developed and offered now and into the future. The ultimate goal is to provide training and educational opportunities to Hawai'i residents to prepare them for jobs and career advancement within our visitor industry and related sectors.

- **What if I already completed the survey?**

Mahalo nui if you have already shared your company's perspective! Please disregard this invitation.

HTA has commissioned Anthology Research, an independent professional research company in Hawai'i, to conduct this survey. It should take no more than 15 minutes to complete. Your responses will be kept strictly confidential, and results will be reported only in the aggregate.

We greatly value your participation, and your feedback is instrumental in evaluating the visitor industry workforce landscape in Hawai'i.

Should you have questions about this survey, please contact Anthology Research at surveys@anthologygroup.com.

Mahalo,
John De Fries
President and Chief Executive Officer
Hawai'i Tourism Authority

A. To help ensure every voice is heard, this survey should only be completed once per company and should be completed by an individual (senior human resources representative, general manager or owner) within your company with knowledge of the company's workforce practices and policies, including hiring and training within the organization.

If there is another individual at your company who should be taking this survey, please forward this message on to them.

To confirm, are you a person with knowledge of your company's workforce practices and policies? This includes hiring and training within the company.

1. Yes
2. No, there is another person at my company who should be taking this survey. **[THANK AND TERMINATE]** – Please forward the invitation for this survey to the appropriate human resources representative or senior manager in your organization. Or, enter their email address below to send them the survey.
 - a. First Name: _____
 - b. Last Name: _____
 - c. Email address: _____
 - d. Confirm Email address: _____

B. What is your role at your company?

1. Human Resources VP / Director / Manager
2. Owner
3. General Manager
4. Operations VP / Director / Manager
5. Other: please specify _____

C. On which island(s) does your company operate? (Select all that apply)

1. O'ahu
2. Hawai'i Island
3. Maui
4. Lāna'i
5. Moloka'i
6. Kaua'i
7. Do not operate in Hawai'i **[THANK AND TERMINATE]**
8. Prefer not to say **[THANK AND TERMINATE]**

D. Is your business part of the visitor industry? By visitor industry, we mean a company that sells or provides most of its products or services to Hawai'i visitors.

1. Visitor industry is our primary business
2. Visitor industry is not our primary business, but we do serve some visitors
3. We support businesses in the visitor industry
4. None of our work is related to the visitor industry **[THANK AND TERMINATE]**

E. What is your company's primary industry?

1. Accommodations / Lodging

2. Agritourism / Farming / Ranching
3. Attractions / Recreation / Entertainment
4. Food and Beverage / Restaurants
5. Professional Services
6. Retail
7. Transportation / Tour Operators
8. Visitor industry support services (please specify) _____
9. Other industry not listed above (please specify) _____

- F. Including yourself how many persons are employed by your company here in Hawai'i?
- o Include full time, part-time and on-call employees
 - o Include any family members if you are a family-owned business
 - o If you are part of a larger entity or corporation, please answer only for the location(s) for which you are responsible
 - No. of employees in Hawai'i: _____

G. How many years has your company operated in Hawai'i? _____

H. Please describe your business - what type of product(s) or service(s) do you offer?

To begin, we would like to ask you about your perceptions of the visitor industry as a whole, from your viewpoint as an employer in the industry.

1. Based on your experience and knowledge, how would you rate Hawai'i's visitor industry in each of the following areas? (Rotate order of items)

	Excellent	Good	Only Fair	Poor
As presenting opportunities for career advancement	4	3	2	1
As a desirable industry in which to work	4	3	2	1
As offering competitive wages	4	3	2	1
As offering significant training programs	4	3	2	1
As offering opportunities to meet people from diverse cultures / backgrounds	4	3	2	1
As offering generous benefits	4	3	2	1

Next, we would like to ask about your perceptions of the available workforce. We understand there are a wide variety of roles within organizations. For the purposes of this section, please consider and include in your thinking both hourly and salaried employees (fulltime, parttime and on-call) and the needs of your organization overall.

2. How difficult is it to **recruit new candidates for open positions** at each of the following levels? If your company does not have any positions at a given level, please select "N/A".

	Very easy	Somewhat easy	Somewhat difficult	Very difficult	N/A
Entry level	4	3	2	1	9
Supervisor	4	3	2	1	9
Middle management	4	3	2	1	9
Senior management	4	3	2	1	9

3. How difficult is it to **retain current workers** at each of the following levels? If your company does not have any positions at a given level, please select "N/A".

	Very easy	Somewhat easy	Somewhat difficult	Very difficult	N/A
Entry level	4	3	2	1	9
Supervisor	4	3	2	1	9
Middle management	4	3	2	1	9
Senior management	4	3	2	1	9

4. What specific roles / positions are most needed at this time in your company? Please be as specific as possible.

5. What specific roles / positions are most challenging to fill at this time? Please be as specific as possible.

6. As your company looks ahead to the future, in the next 3-5 years, how much demand do you expect to have for the following types of positions?

	Very strong demand	Somewhat strong demand	Somewhat weak demand	Very weak demand	N/A
Entry level	4	3	2	1	9
Supervisor	4	3	2	1	9
Middle management	4	3	2	1	9
Senior management	4	3	2	1	9

7. As your company looks ahead to the future, in the next five years and beyond, for what specific roles do you expect to have the greatest need? In other words, what positions will be most needed in the future for your organization? Please be as specific as possible.

8. In general, thinking about your interactions with recent applicants and new hires, how proficient in each of the following areas are candidates who apply for a job within your company?

	Totally proficient	Somewhat proficient	Somewhat lacking	Totally lacking	N/A
Applicants possess all necessary requirements for the job	4	3	2	1	9
Applicants possess required basic skills (e.g., reading, writing, math)	4	3	2	1	9
Applicants possess required job-specific occupational skills (e.g., food handling, commercial driving, housekeeping, bookkeeping, sales)	4	3	2	1	9
Applicants possess required soft / interpersonal skills (e.g., positive attitude, communication, customer service, cultural awareness / sense of place)	4	3	2	1	9
Applicants possess required digital skills (e.g., basic computer use, word processing, basic software proficiency)	4	3	2	1	9
Applicants possess required Hawai'i tourism-specific knowledge (e.g., Hawaiian culture, revenue management, how the industry works, distribution systems)	4	3	2	1	9
Applicants possess required organizational and management skills (e.g., time management, supervising employees)	4	3	2	1	9

9. When considering your company's needs overall, what types of topics would be most important to cover in workforce training and development programs?

The next few questions are intended to examine your perceptions of educational institutions and programs.

10. Thinking of your organization's needs at this time, what level of formal education is most needed for open positions? Please rank each of the following education levels by order of most in need for applicants you are looking to hire, with the most needed education level on top, second most needed after that, etc.

1. High school diploma
2. Associate degree
3. Bachelor's degree
4. Post-graduate degree

11. In general, how would you rate the following educational institutions in preparing visitor industry workers for jobs in your company?

	Excellent	Good	Only Fair	Poor	Don't Know/ Not Sure
High Schools	4	3	2	1	9
Trade Schools	4	3	2	1	9
Community Colleges	4	3	2	1	9
4-year Colleges	4	3	2	1	9

12. For post-secondary education, what discipline / subject area(s) of study are most in demand in your company?

13. How valuable, if at all, do you find job-specific certifications in preparing an individual for a related job within your organization? (Examples of such certifications could include food handling, customer service, tour guide, etc.)

1. Very valuable
2. Somewhat valuable
3. Not very valuable
4. Not at all valuable
5. Don't know / Not familiar with job-specific certifications in my industry

14. Based on your organization's needs, in what areas, if any, should job-specific certifications be offered?

Next, we would like to learn more about the training programs that your company currently offers, in order to help identify areas of opportunity to support Hawai'i's visitor industry workforce.

15. Does your company allocate a specific budget for formal training or development programs for employees?

1. Yes
2. No
3. Don't know / Not sure

16. In the next two years, do you anticipate your company's training / development program budget to increase, remain the same, or decrease?

1. Increase
2. Remain the same
3. Decrease
4. Don't know / Not sure

17. Does your company offer formal training / programs to employees on each of the following topics? If training is offered, is it available to all employees or only some?

	Yes, available to all employees	Yes, available only to employees in select roles	No, not provided to employees	Not currently provided, but would like to provide to some/all employees
Employee orientation / onboarding				
Directed on-the-job training				
Compliance training				
Soft skills training				
Leadership training				
Team building				
Customer service training				
Anti-bias, Diversity & Inclusion training				
Sexual harassment prevention				
Operational / Technical training				
Mentorship program				
Hawaiian culture training				
Harassment / Discrimination Prevention				
Occupational safety / health				
Ethics				
Intellectual property (IP) Protection/Cyber Security				
Sustainability and green practices				
Market / Industry trends				

18. Are there any other types of training / development programs your company has in place? If yes, please describe them below.

19. Does your company plan to implement any new training / development programs for employees in the near future? If yes, please tell us about them below.

1. Yes (please specify) _____
2. No
3. Don't know

20. What barriers, if any, are preventing your organization from offering training or development programs for your employees? (Please select all that apply)

1. We are too short staffed and work needs to get done
2. We do not have budget for training

3. We need hands-on training and that is not possible during the pandemic
4. We reduced our office space and now do not have enough physical space to do in-person training
5. Training courses are too long - we cannot allocate enough time for the training
6. Other COVID-19 / pandemic related issues (please specify)_____
7. Other barriers (please specify)_____

21. Yes or no, does your company have the necessary equipment and / or office space to enable virtual training (via videoconference or self-paced online)?

1. Yes, for all employees
2. Yes, for some employees
3. No

22. Does your company invest in long-term employee career development and retention?

1. Yes
2. No

22a. **[IF YES TO IN Q22]** In what ways, if any, does your company invest in long-term employee career development and retention?

23. Were you aware, prior to this survey, that post-secondary hospitality programs usually require students to participate in an internship as a requirement of graduation?

1. Yes
2. No

24. Does your company offer an internship program or apprenticeships to students interested in a career in the visitor industry?

Yes No

Internship program

Apprenticeships

25. [IF NO TO INTERNSHIPS IN Q24] Why does your company not offer internship opportunities to students?

26. Hawai'i Tourism Authority enables and supports a number of programs to develop the current and future workforce for the visitor industry. Prior to this survey, were you aware of each of the following programs and is each program something that would be of interest to your organization in the future? **(ROTATE ORDER)(TELEPHONE-READ DESCRIPTIONS IF NEEDED)**

	Yes, aware of the program and would be interested in future	Yes, aware of the program, but not interested	No, not aware of the program, but would be interested in future	No, not aware of the program and not interested
<p>L.E.I. (Leadership, Exploration, Inspiration) Program This program on O'ahu, Maui, Kaua'i and the island of Hawai'i brings more than 1,000 teens from throughout the state in direct contact with hotels, businesses, and tourism industry leaders. In the program, the future engages the present.</p>				
<p>Hawai'i Department of Education's Career & Technical Education (CTE) program Launched in 2020, this program provides high school students with Service Excellence Certificate of Achievement. The curriculum was exclusively developed in partnership with ClimbHI and the School of Hotel Administration at the Cornell SC Johnson College of Business, one of the leading hospitality administration programs in the world.</p>				
<p>Campaign for a Safer Community with Ho'ōla Nā Pua An initiative to combat sex trafficking in partnership with Ho'ōla Nā Pua, a Hawai'i nonprofit working against sex trafficking, the campaign included symposiums held across the state aimed at empowering Hawai'i's visitor industry management and others to take a stand against trafficking.</p>				
<p>Native Hawaiian Hospitality Association (NaHHA) Cultural Training HTA provides support to NaHHA to bridge the gap between the Hawaiian community and the visitor industry. NaHHA offers cultural training and consultation to individuals and organizations to learn and incorporate Hawaiian culture, values, and traditions.</p>				
<p>Sustainable Tourism Management with the Sustainable Tourism Association of Hawai'i HTA partners with the Sustainable Tourism Association of Hawai'i (STAH), which protects Hawai'i's natural environment and host culture</p>				

through the promotion of responsible travel and educational programs relating to sustainable tourism for residents, businesses and visitors. STAHL focuses on its Sustainable Tour Operator Certification Program, Tour Operator/Tour Guide Training Program, and Educational Outreach/Partnership Development.				
Hawai'i AgriTourism Initiative HTA partners with GoFarm Hawai'i, Hawai'i AgriTourism Association, and the O'ahu Resource & Development Council to grow agritourism experiences through the Hawai'i AgriBusiness Guidebook and Hawai'i Agri-Tourism Webinar Series.				
Certified Festival and Event Executive (CFEE) Program HTA partners with the International Festivals & Events Association (IFEA) to provide the CFEE program. The core education curriculum includes Non-Sponsorship Revenue, Project Management, Operations/Risk Management, Marketing & Media Relations, Administration & Management, Sponsorship/Sponsor Service.				
Customer Service In Hawai'i Training Program <ul style="list-style-type: none"> • Certificate of Professional Development (for non-tour guides) • Certificate for Hawai'i's Professional Tour Guides (for tour guides) HTA partners with the University of Hawai'i Kapi'olani Community College to provide the Customer Service in Hawai'i training program which is designed for employees in service-related industries. The program's foundation is based on Hawaiian culture. It is focused on developing practical skills that help to provide memorable service experiences for customers. This program also serves as the training pathway and exam preparation for the Certification for Hawai'i's Professional Tour Guides.				

27. What role do you see for Hawai'i Tourism Authority in Hawai'i's visitor industry workforce development?

26. As was mentioned at the beginning, this survey is to be completed only one time per organization. To ensure no duplicative responses are received for the same entity, we ask that you provide your organization name. Your responses will not be connected to your answers in any way—responses to the survey will be reported only in the aggregate.

28. Those are all of the questions we have for the anonymous survey of visitor industry stakeholders. As a reminder, responses to the survey questions will be reported only in the aggregate, not individually, so your answers to the previous questions will not be identified. Mahalo for your time and opinions.

If you would like to be entered in the drawing to receive one of five \$250 gift cards, provided by Anthology Research, please provide your business name and contact information below (business name must be provided in order to be eligible for the drawing).

Business name: _____

Contact name: _____

Email address: _____

Phone number: _____

29. As HTA continually seeks ways to create connections to better support development of the visitor industry workforce, would you be interested in being contacted by HTA to discuss any potential partnership opportunities between your organization and educational institutions or other partners?

Again, your responses to the prior survey questions will not be connected to you or to your company.

- 1 Yes
- 2 No

PROFILE OF SURVEY RESPONDENTS - RESIDENT SURVEY

	OVERALL	COMMENT
COUNTY		
Honolulu	69%	
Hawai'i	14%	
Maui	11%	
Kaua'i	5%	
O'AHU		
Metro HNL	27%	
Waikiki	5%	
East HNL	18%	
Windward/ NS	14%	
Central	20%	
West	17%	
HAWAII ISLAND		
Hilo	73%	
Kona	27%	
PRIMARY RESIDENCE		
Own	58%	
Rent	31%	
Live rent free	11%	
HOUSEHOLD SIZE		
One person	18%	The typical respondent resided in a home that contained an average of 2.99 persons. The median was lower at two persons.
Two persons	33%	
Three to four persons	37%	
Five or more	12%	
MEAN	2.99	
YEARS IN HAWAII		
Born and Raised	64%	
Transplant	36%	
AGE		
18-34	22%	The typical respondent was 49.70 years of age with the median being 48 years old.
35-49	28%	
50-64	23%	
65+	26%	
MEAN	49.70	
ETHNICITY		
Caucasian	29%	Weighted data to reflect population estimates of adults 18 and older on each of the major counties.
Japanese	28%	
Hawaiian	19%	
Chinese	4%	
Filipino	12%	
Other	7%	
HOUSEHOLD INCOME		
< \$50K	24%	
\$50K-\$100K	31%	
\$100K+	36%	
Rf	8%	
GENDER		
Male	44%	Targeted 50/50 split.
Female	56%	

HAWAI'I RESIDENT OMNIBUS STUDY QUESTIONNAIRE

ANTHOLOGY RESEARCH 808 POLL

May 2022

Aloha,

We are Anthology Research, a market research company based here in Hawai'i, and we're conducting a market research survey. This is strictly market research as we do no product promotion or selling. All of your answers are confidential and will be reported only in combination with other respondents.

- A. Are you 18 years of age or older?
 - 1. Yes
 - 2. No (THANK & TERMINATE)

- B. Are you a current fulltime resident of Hawai'i (lives in the state at least 6 months out of the year)?
 - 1. Yes
 - 2. No (THANK & TERMINATE)

- C. On which island do you live?
 - 1 O'ahu
 - 2 Hawai'i
 - 3 Maui
 - 4 Kaua'i
 - 5 Lāna'i or Moloka'i
 - C_1. Which of the following best describes where you live?
 - 1. Metropolitan Honolulu (excluding Waikīkī)
 - 2. Waikīkī
 - 3. East Honolulu
 - 4. Windward O'ahu / North Shore
 - 5. Central O'ahu
 - 6. West O'ahu

 - C_2. Which of the following best describes where you live?
 - 1 East Hawai'i/ Hilo
 - 2 West Hawai'i/ Kona

This survey is slightly different than some in that we will be asking some questions on multiple topics. To begin...

- 1. Based on what you know or have heard, how would you rate Hawai'i's visitor industry in each of the following areas? If you're not sure on any item(s), please take your best guess.
 - Excellent Good Only Fair Poor
 - As presenting opportunities for career advancement
 - As a desirable industry in which to work
 - As offering competitive wages
 - As offering significant training programs
 - As offering opportunities to meet people from diverse cultures/ backgrounds

As offering generous benefits

And now a few last questions for classification purposes only.

D2. What is your current employment status?

1. Employed full time
2. Employed part time
3. Fulltime student
4. Not employed, looking for work
5. Not employed, not looking for work
6. Retired, not employed
7. Homemaker
8. Disabled

D2a. Looking at it a little differently, which of the following best describes your current employment status?

1. Currently employed as a payroll worker for a company in Hawai'i (fulltime, parttime)
2. Currently employed (working remotely) as a payroll worker for a company NOT in Hawai'i (fulltime, parttime)
3. Currently self-employed or independent contractor
4. Retired, but might rejoin labor force later
5. Permanently retired (no plans to ever rejoin labor force)
6. Not currently working, but actively looking for work
7. Not currently working, and not actively looking for work
8. I have never worked, but could join the labor force in the future

D2b. (If employed) Does your current job have any connection to the visitor industry?

1. Yes
2. No
3. Don't know / Not sure

D3. What was your age on your last birthday? _____

D4. Including yourself, how many people live in your household?

of people in HH _____

D5. Do you own or rent your home?

- 1 Own
- 2 Rent
- 3 Live rent free

D6. Were you born in Hawai'i?

- 1 Yes
- 2 No

D7. What is your ethnic identification? [**IF MORE THAN ONE, ASK, "With which do you identify The most".**]
(IF NO CHOICE, CHOOSE MIXED)

- 1 Caucasian
- 2 Japanese

- 3 Chinese
- 4 Filipino
- 5 Hawaiian/Part-Hawaiian
- 6 African-American
- 7 Other (please specify): _____
- 8 Mixed
- 9 Prefer not to say

D8. I will read some broad categories of income and I would like you to tell me when I come to the category that includes your household's income before taxes for 2021. Please consider and include in your thinking the income of all persons living in your household as well as income from all sources including investments, retirement funds, etc.

(INTERVIEWER: READ CATEGORIES) Again, just stop me when I come to the correct category.

- 1 Less than \$25,000
- 2 \$25,000 but less than \$50,000
- 3 \$50,000 but less than \$75,000
- 4 \$75,000 but less than \$100,000
- 5 \$100,000 to \$150,000
- 6 \$150,000 or more
- 7 (DO NOT READ) Don't Know/Refused

D9. [Record, DO NOT ASK:] Gender

- 1 Male
- 2 Female
- 3 Nonbinary

QUALITATIVE RESEARCH DISCUSSION OUTLINE

HTA WORKFORCE NEEDS ASSESSMENT QUALITATIVE

June 2022

EXPLANATION OF PROCESS

- Moderator introduce self and explain mechanics of interview
- Executive Interview approximately 45-55 minutes
- No right or wrong answers
- Confidentiality protected - Results presented in the aggregate only
- Discussions are being recorded
- Gratuity - \$150 eGift card or donation to non-profit of choice

INTRODUCTIONS AND WARMUP

I'd like to start by going around the room asking each of you to introduce yourself, first names only are fine, what type of company you work for (no need the name), your role, what do you like to do in your free time?

As you know, this research is being sponsored by the Hawai'i Tourism Authority, and they are very grateful for you taking the time to share your perspectives with us today. The objective of this research effort is to obtain information and data to help determine the type of skills and training (including workshops / classes) that are needed in Hawai'i's visitor industry. The results of this research will help ensure the right training, classes and programs are being developed and offered now and into the future. HTA intends to share the results from this research with other government agencies as well as with educational institutions and workforce development organizations. The ultimate goal is to provide training and educational opportunities to Hawai'i residents to prepare for jobs in our visitor industry.

If you have operations on multiple islands or are based on a neighbor island, please let us know if there are geographic or other considerations that we should be aware of, please let us know.

So as we dive in, let me ask: what is the first thing that comes to mind when you hear "Hawai'i's visitor industry workforce"? What do you think of? Why does that come to mind?

CURRENT WORKFORCE

First, let's acknowledge that now is a difficult time to find employees across the economy, in all sectors. In this discussion, we very interested in your thinking about your needs in the near term, but we are also very interested in understanding what can be done to plan for the long term future of Hawai'i's visitor industry workforce.

Thinking about recent new hires or applicants you're currently seeing, would you, generally speaking, say new employees enter with most of the skills needed or do they require additional training? What skills or talents do they come with that are particularly useful or well-developed? In what specific areas are job applicants or new employees most lacking? Are these "soft skills" or job-specific skills?

EXISTING SKILLS GAPS

As I mentioned earlier, we are currently collecting data from visitor industry businesses on what they are seeing in applicants for open positions. I'd like to share with you a few categories that were identified as lacking among recent applicants by a majority of survey respondents.

[MODERATOR TO SHOW LIST WITH DESCRIPTIONS ON SCREEN (VIRTUAL) OR PASS OUT PRINTED LIST WITH DESCRIPTIONS FOR REACTION.]

- Soft / interpersonal skills (e.g., positive attitude, communication, customer service, cultural awareness / sense of place)
- Job-specific occupational skills (e.g., food handling, commercial driving, housekeeping, bookkeeping, sales)
- Hawai'i tourism-specific knowledge (e.g., Hawaiian culture [‘Ōlelo Hawai'i, Hawaiian hospitality, Senses of place, history, culture, place names], revenue management, how the industry works, distribution systems)
- Organizational and management skills (e.g., time management, supervising employees)

For each item, ask:

In which area(s) does your business see a need for more training? Why or why not?

In what specific areas on this topic would you like to see additional training offered? (Probe until unproductive)

Would this topic be appropriate for the industry as a whole, or specific to your sector?

At what level would this training be most appropriate? - in school (high school, college, grad school), after they finish school and before they get a job in the industry, or after they've joined the workforce (as an employee)? Why do you say that?

What else, if anything, should be considered when developing a training program around this topic? (Island-specific differences?)

OTHER TRAINING NEEDS

Thinking about the topics we've discussed so far, are there any other things on which you would like to see additional training for the visitor industry workforce?

We'd like to show you a list of other areas in which training might be valuable. Please take a look at this list and identify which, if any, are of interest to you and your organization. (Select Top Three)

- A. Compliance training
- B. Leadership training
- C. Team building
- D. Anti-bias, Diversity & Inclusion training
- E. Sexual harassment prevention
- F. Operational / Technical training
- G. Mentorship program
- H. Hawaiian culture training
- I. 'Ōlelo Hawai'i
- J. Harassment / Discrimination Prevention
- K. Occupational safety / health
- L. Physical safety and security
- M. Identifying and reporting human/ sex trafficking
- N. Ethics

- O. Intellectual property (IP) Protection / Cyber Security
- P. Sustainability and green practices
- Q. Regenerative tourism
- R. Market / Industry trends

Which, if any, of these categories stand out to you as needed for your organization? Why are they needed?

What specific topics within these categories would you find most beneficial?

Anything else come to mind that is not on this list or hasn't already been discussed?

ASSESSMENT OF EXISTING PROGRAMS

What training programs are you aware of that currently exist for workers in the visitor industry? Who offers these programs? (Probe for specifics)

Who are these programs intended to serve? What kinds of workers do you think they are meant for?

Are these existing programs relevant for you and your business? Why or why not?

What is good about existing programs? What do they do well? What positive outcomes do you see as a result of these programs?

What is missing from existing programs? Are there things they aren't teaching but should? What are ways they could better deliver these programs / reach people? Are they missing workers who need the training?

From your perspective, is it better for employees to participate in training programs while employed or better they receive training before they are employed?

[MODERATOR NOTE: KEY QUESTIONS]

What successful programs in other markets have you heard of that might help Hawai'i's visitor industry?

If training programs such as those we have been talking about today were to be offered, how would you expect to learn about these types of programs so that you could take advantage of them, if your company is interested?

EMPLOYER-PROVIDED TRAINING

Does your company provide training of any kind to new and current employees? Why or why not?

(FOR THOSE WHO OFFER TRAINING)

What topics does the training cover and at which stages of employment? (Probe for specifics)

What format is the training in? In-person/virtual, self-paced, etc.

What assistance (financial or programmatic), if any, do you receive from third parties? If so, why?

What topics or specific areas does your company consider it necessary to personally develop materials and present/administer the training sessions, and which, if any, would you be glad to have the support of the visitor industry to carry out? In other words, in what topics/areas would you most like to have support in the form of

workforce development programs? Do you envision these programs serving current employees in your organization and/or prospective employees in the pipeline?

CERTIFICATIONS - IF TIME ALLOWS

What comes to mind when you hear the term “workforce certifications” or “job certifications”? What is your understanding of the term “certification”? Do you perceive certification programs to be similar to or different than the types of workforce training we’ve been talking about? Why?

Does your company value job-specific certifications? Why or why not? Do employees who enter the job market with certain certifications demand higher compensation / are they in more demand as a result of the certification? Does / Is your company willing to provide incentives to employees who complete certification programs? Are certifications worth the extra pay or higher position that employees receive?

In which specific areas are certifications most valuable? Any areas where they are not as valuable?

Some of the certification programs that HTA supports or has supported include:

- Customer Service In Hawai‘i Training Program
 - Certificate of Professional Development (for non-tour guides)
 - Certificate for Hawai‘i’s Professional Tour Guides (for tour guides) (requires testing and recertification)
- Certified Festival and Event Executive (CFEE) (requires testing and recertification)

Are there any additional areas in which you think the industry should develop certification programs to support the current or next generation of workforce?

LOOKING FORWARD

What is on the horizon for the tourism industry workforce in Hawai‘i?

What does the visitor industry employee of the future look like? How do you expect your needs to evolve or change in the future? What skills or education do you anticipate will be in higher demand in the future?

What must the industry do now to prepare the workforce for the visitor industry of the future?

FINAL THOUGHTS

Any desires or expectations regarding any of the things we have discussed?