



WINDWARD O'AHU WORKFORCE ANALYSIS

OCTOBER 2024



HAROLD K.L. CASTLE
FOUNDATION



Hawaii Workforce Pipeline Inc.
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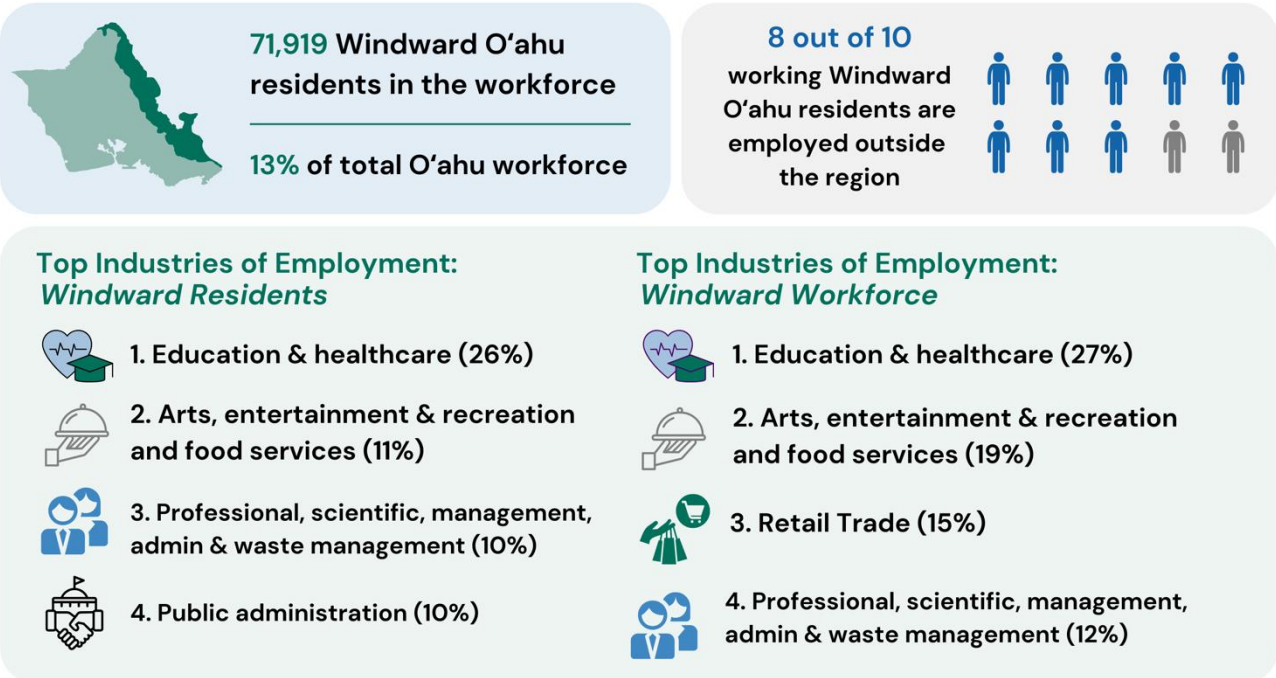
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INSIGHTS FOR IMPACT

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EXECUTIVE SUMMARY

Throughout the state, there has been renewed focus on developing strategies that will enable residents to live, work, and thrive in Hawai'i. Employers, educators, and community partners in the Windward region of O'ahu, extending from Kahuku in the north to Waimānalo in the south, are acutely aware of how these challenges are taking a toll on their communities. This analysis works in support of the development of a more coordinated, strategic approach for the region.



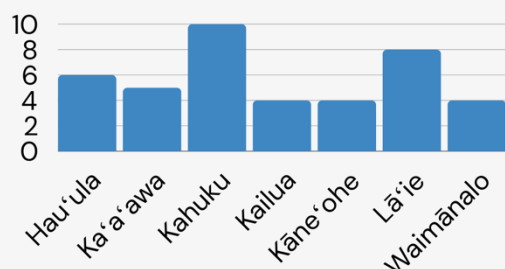
Windward O'ahu is home to approximately 13% of O'ahu's total labor force. However, approximately 80% of Windward residents commute out of the region for work. Overall, educational services and healthcare, and arts, entertainment and accommodation & food services are the top industries of employment for both Windward residents and workers employed in the Windward region, regardless of their residence.

Employment in industries such as professional services and public administration are more prominent among Windward residents than workers in the region, suggesting these opportunities are more readily available elsewhere. In contrast, employment in retail trade is more prevalent among workers on the Windward side compared to resident employment, suggesting there are more opportunities than workforce available in the retail space.

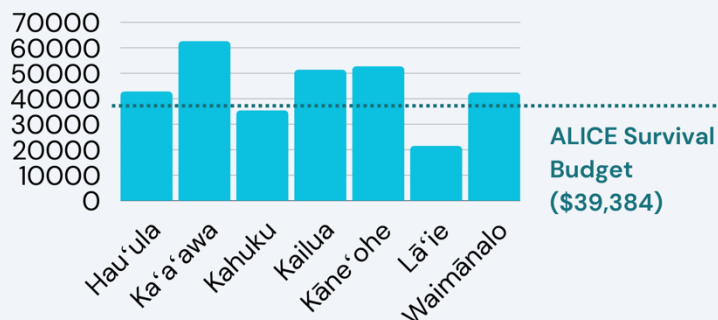
Sub-regions within Windward O'ahu are highly diverse in terms of their population, employment, and economic characteristics, and they each face unique workforce challenges. Northern communities like Kahuku, Lā'ie, and Hau'ula generally experience higher unemployment rates, signaling a need for more focused workforce development

efforts in these regions. Worker earnings in Kahuku and Lā'ie fall below the ALICE survival budget for a single adult (\$39,384), indicating that many workers struggle to afford basic necessities in these communities.

Windward Unemployment Rates (%)



Resident Median Annual Earnings (Dollars)



Highest Earning Industries:



- **Public Administration** (\$81K median)
- **Information** (\$77K median)

Lowest Earning Industries:



- **Retail trade** (\$30K median)
- **Arts, entertainment & recreation and food services** (\$25K median)

Throughout the Windward region, rental costs are higher compared to the rest of island, which represents a significant barrier for workers seeking to live near where they work, particularly for those employed in lower paying industries like retail, food services, and agriculture.

On the employer side, businesses are experiencing major recruitment and retention challenges, including a limited pool of qualified, local talent and high turnover for entry-level roles. Many employers are already implementing strategies to address their workforce challenges, including reviewing compensation and benefits, creating pathways for career advancement, and partnering with local Hawai'i Department of Education high schools. However, there is significant opportunity to coordinate and scale these efforts, particularly in underrepresented sectors like retail trade and food service. Internships are especially crucial to allow students to gain on-the-job experience and develop essential professional skills.

Expanded partnerships with Windward Community College and regional job training centers like the Job Corps would enable employers to develop new trainings to meet their needs and recruit skilled candidates in their communities. Sectors like healthcare and skilled trades are ideal for workforce development efforts, given that many of these occupations do not require a 4-year degree and offer relatively high pay for candidates with the right training and experience. Additional resources dedicated to financial support and wraparound services will be key to providing equitable access to employment and training opportunities in the region and statewide.

INTRODUCTION

This Windward O‘ahu Workforce Analysis, funded by the Harold K.L. Castle Foundation, includes eight ZIP codes comprising Windward O‘ahu: Kahuku, Lā‘ie, Hau‘ula, Ka‘a‘awa, Kāne‘ohe, Kāne‘ohe Marine Corps Base Hawai‘i (MCBH), Kailua, and Waimānalo. The analysis leverages quantitative demographic and labor market data combined with qualitative stakeholder insights to inform targeted workforce development strategies that are mutually beneficial to Windward O‘ahu employers and residents. Recommendations are provided to enhance and streamline workforce development efforts in the region.

This analysis represents a foundational piece of a broader effort to uplift Windward O‘ahu residents and employers. The Harold K.L. Castle Foundation has formed a coalition of prominent employers, educational leaders, and community partners in Windward O‘ahu who will leverage the analysis as they begin to develop shared strategies and coordinate their workforce development efforts. Ultimately, the goal of this work is to make progress towards alignment between job seekers, education opportunities, and employers, to ensure that Windward residents can live and work in their communities and that employers have qualified local talent to support the success of their businesses and the Windward economy as a whole.

PROJECT TEAM

The Windward O‘ahu Workforce Analysis was funded by the Harold K.L. Castle Foundation. AE Consulting was contracted to complete data collection, analysis, and reporting. Hawai‘i Workforce Pipeline provided additional support in conducting a portion of the stakeholder outreach.

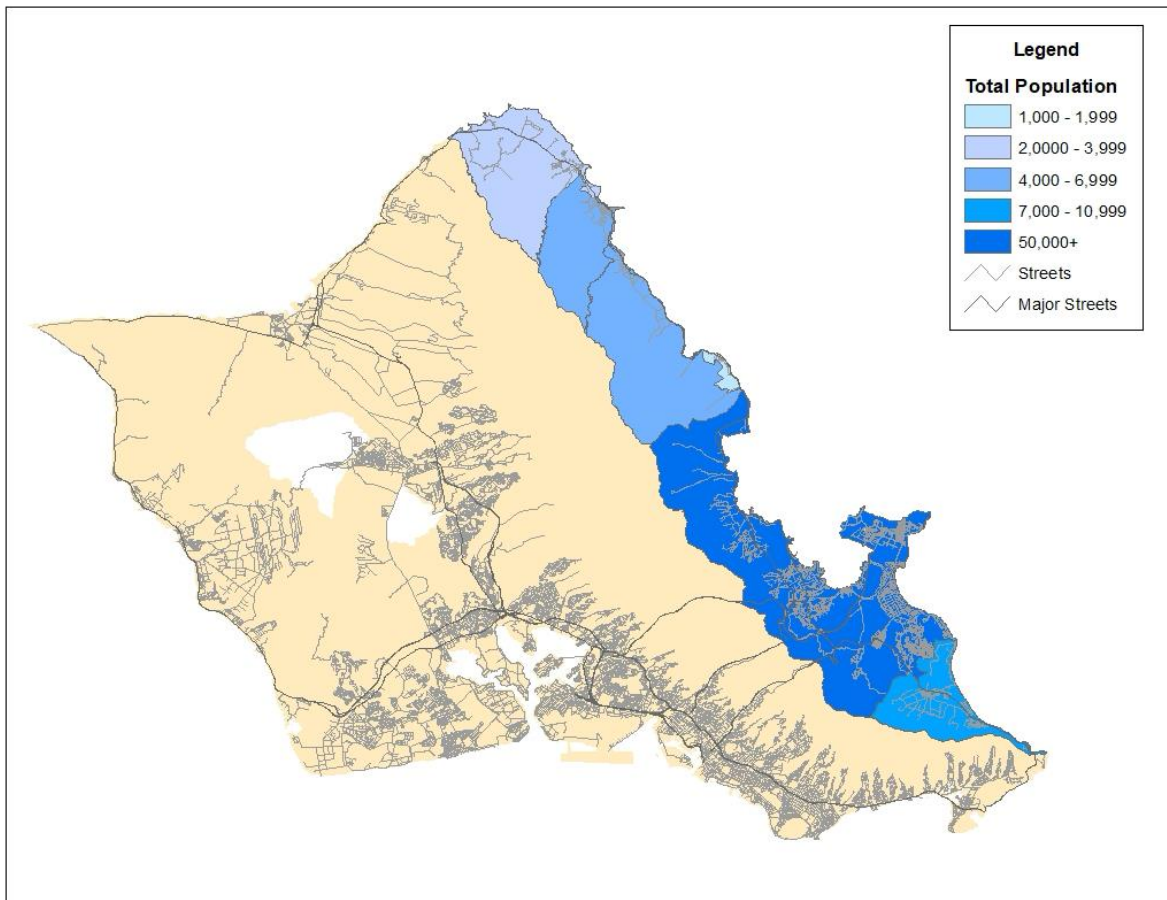


WINDWARD O'AHU RESIDENT DEMOGRAPHICS

The Windward region, with a total population of 135,225 residents, represents approximately 13.4% of Honolulu County's total population of 1,010,100. The region's demographic distribution is notably concentrated in two major areas. Kāne'ohe has the largest share residents at 41% (55,888 residents), followed closely by Kailua at 38% (51,966 residents). Together, these two communities make up 79% of the Windward region's residents. The smaller remaining communities include Waimānalo, representing 8% (10,307 residents), Lā'ie at 4% (5,774 residents), Hau'ula at 3% (4,555 residents), Kahuku at 2% (2,742 residents), Kāne'ohe Marine Corps Base Hawaii (MCBH) at 2% (2,530 residents), and Ka'a'awa at 1% (1,463 residents).

This distribution highlights a clear urban concentration in Kāne'ohe and Kailua, with more rural communities extending to the north and the south. This diverse mix of urban and rural areas, along with MCBH, contributes to the Windward region's unique and variable demographic landscape.

Figure 1: Windward O'ahu Resident Population



Source: American Community Survey 5-Year Estimates, 2018-2022

Windward O‘ahu has a higher proportion of young people (under 18 years), at 24% compared to 20.9% for O‘ahu overall. This concentration is particularly pronounced in Kahuku (32%), Lā‘ie (31%), and Hau‘ula (30%). The concentration of youth in these communities may be attributed to the Brigham and Young University campus.

Seniors (residents 65 years and over) make up 17% of the Windward O‘ahu population, which is similar to O‘ahu overall (18.6%), though certain ZIP codes show significantly higher concentrations, such as Kāne‘ohe with 23% of its population in this age group.

Table 1: Windward O‘ahu Resident Age Distribution

Selected Age Categories	O‘ahu Overall		Windward O‘ahu ¹	
	Estimate	Percent	Estimate	Percent
5 to 14 years	118,474	11.7%	24805	14%
15 to 17 years	32,518	3.2%	6836	4%
Under 18 years	211,222	20.9%	44232	24%
18 to 24 years	92,292	9.1%	16585	9%
15 to 44 years	404,506	40.0%	71023	39%
16 years and over	820,606	81.2%	140951	78%
18 years and over	798,878	79.1%	136586	76%
21 years and over	764,886	75.7%	129958	72%
60 years and over	247,701	24.5%	42490	23%
62 years and over	223,135	22.1%	37926	21%
65 years and over	187,393	18.6%	31466	17%
75 years and over	86,867	8.6%	13857	8%

Source: American Community Survey 5-Year Estimates, 2018-2022

The racial composition of Windward O‘ahu exhibits significant diversity and variation across different ZIP codes. While O‘ahu reports a 38% White population, most Windward areas exceed this figure, with Ka‘a‘awa and Kailua leading at 70%. Conversely, the Asian population, which comprises 61% of O‘ahu overall, is generally lower in Windward areas, with the exception of Kāne‘ohe at 63%.

Native Hawaiian and Pacific Islander (NHPI) representation is high in Waimānalo (70%), Lā‘ie (55%), Kahuku (53%), and Hau‘ula (51%), far surpassing the island-wide average of 25%, highlighting a significant concentration of NHPI in these more rural communities of the Windward region.

Table 2: Windward O‘ahu Resident Races by ZIP Code

¹ Age data for MCBH was not included in this table. The American Community Survey data for MCBH only includes those aged 15-34 years old, not all those who reside on the Base.

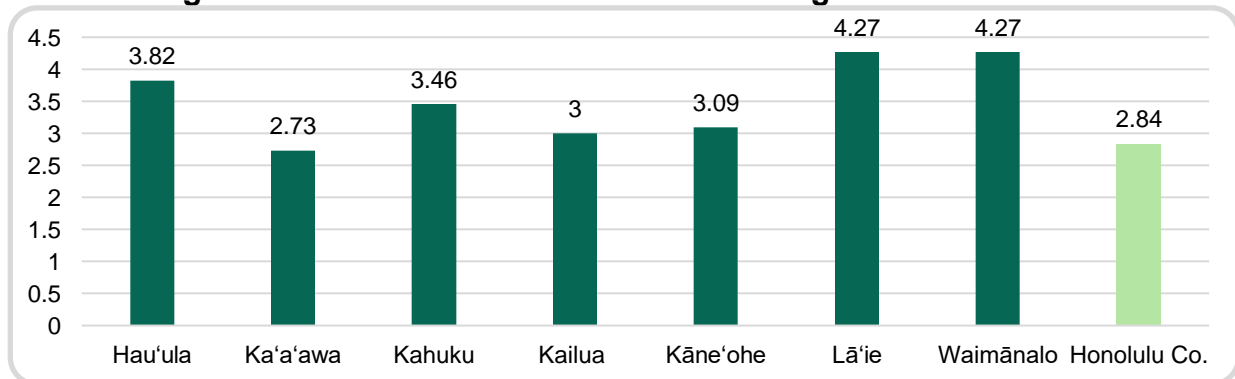
Race alone or in combination with one or more other races	O'ahu Overall	Hau'ula	Ka'a'awa	Kahuku	Kailua	Kāne'ohe	Lā'ie	Waimānalo	MCBH
White	38%	61%	70%	50%	70%	46%	54%	45%	28%
Black or African American	5%	4%	2%	3%	3%	2%	1%	3%	20%
American Indian and Alaska Native	2%	1%	7%	1%	3%	3%	4%	4%	3%
Asian	61%	28%	34%	42%	37%	63%	26%	43%	0%
Native Hawaiian and Other Pacific Islander	25%	51%	42%	53%	18%	32%	55%	70%	4%
Some Other Race	4%	7%	1%	2%	6%	4%	3%	5%	72%

Source: American Community Survey 5-Year Estimates, 2018-2022

Figure 2 presents the average household sizes across different communities in Windward O'ahu, revealing significant variations in living arrangements throughout the region.

Lā'ie and Waimānalo stand out with the largest average household sizes, both at approximately 4.3 people per household. Hau'ula follows closely with an average of 3.8 people per household. These higher household sizes may indicate a higher prevalence of multigenerational living in these communities. In contrast, more urbanized areas like Kāne'ohe and Kailua show average household sizes of 3.1 and 3.0 respectively, more closely aligned to O'ahu overall.

Figure 2: Windward O'ahu Residents Average Household Size



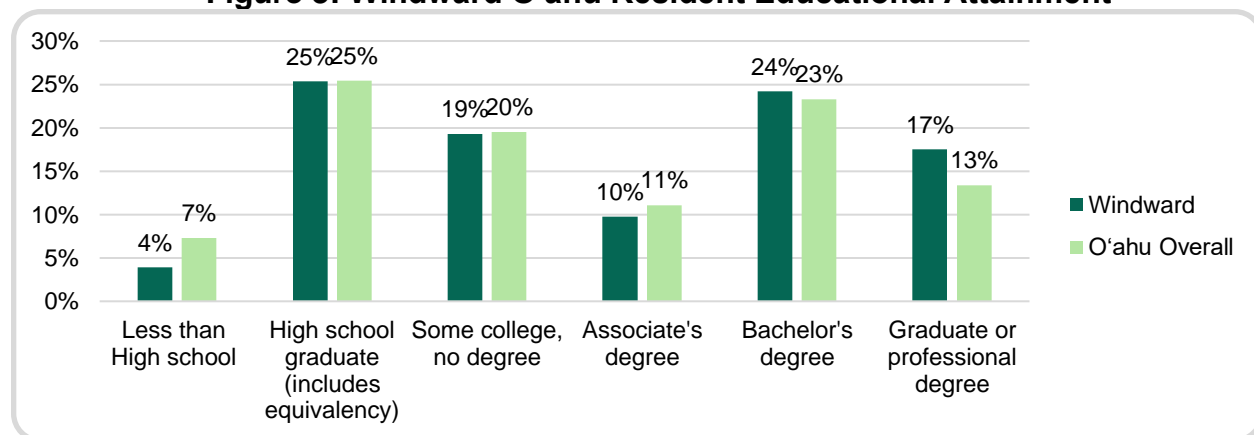
Source: American Community Survey 5-Year Estimates, 2018-2022²

In terms of educational attainment, the data in Figure 3 shows that 25% of Windward residents have a high school diploma or equivalent and that 24% hold a bachelor's degree. Notably, Windward O'ahu boasts a significantly higher proportion of residents with graduate or professional degrees at 17%, compared to 13% for O'ahu overall. The

² Data on average household size was unavailable for MCBH.

area also has a lower percentage of residents with less than a high school education, at 4% compared to 7% for O‘ahu overall.

Figure 3: Windward O‘ahu Resident Educational Attainment

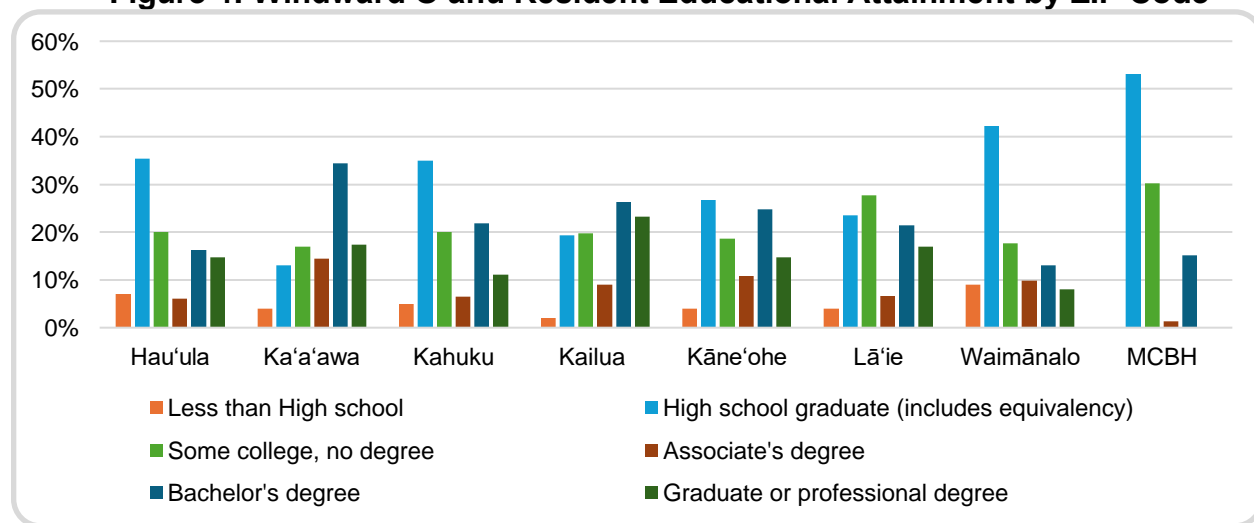


Source: American Community Survey 5-Year Estimates, 2018-2022

While the region overall boasts a highly educated resident pool, significant variations across communities should be noted. Waimānalo and Hau‘ula show higher percentages of residents with only a high school education or less, with 9% and 7% respectively, compared to the regional 4%.

MCBH presents a unique educational profile, with over 50% of residents being high school graduates. The high percentage of high school graduates aligns with the Marine Corps' enlistment requirements, which mandate a minimum of a high school diploma or GED for entry. This requirement, combined with requirements for single enlisted service members to live on base, shapes the educational demographics of MCBH.

Figure 4: Windward O‘ahu Resident Educational Attainment by ZIP Code



Source: American Community Survey 5-Year Estimates, 2018-2022

WINDWARD O'AHU EMPLOYMENT & ECONOMIC CHARACTERISTICS

Regional employment statistics can be reviewed in two different ways: resident employment data versus regional workforce data. Each of these approaches teaches us different things about a community. Resident employment data focuses on the number of employed individuals living in Windward O'ahu, regardless of where they work. This measure provides insights into the employment status, industry association, and labor force participation of the local population. In contrast, regional workforce data counts the number of jobs or employees working within the region, regardless of where they reside. Workforce data offers more insight into the types of jobs available in the region. Both resident and employment data and regional workforce data are valuable in understanding economic and employment dynamics of Windward O'ahu.

The distinction between these two employment measures is particularly significant for Windward O'ahu due to its unique geographic and economic position. As a primarily residential area with strong connections to urban Honolulu and other parts of the island, Windward O'ahu experiences substantial commuter flows. Many residents may work in other parts of O'ahu, while some jobs in the region may be filled by residents from other areas.

In the following section, we will explore both resident employment data and regional workforce data.

EMPLOYMENT

Windward residents account for approximately 13% of O'ahu's total working age population. About 66% of that population participates in the labor force. A key difference, when compared to O'ahu overall, is the markedly larger percentage of armed forces personnel on the Windward side (8% vs. 5.90%), likely due to the presence of the Kāne'ōhe Marine Corps Base Hawai'i (MCBH).

Table 3: Windward O'ahu Residents Employment Status

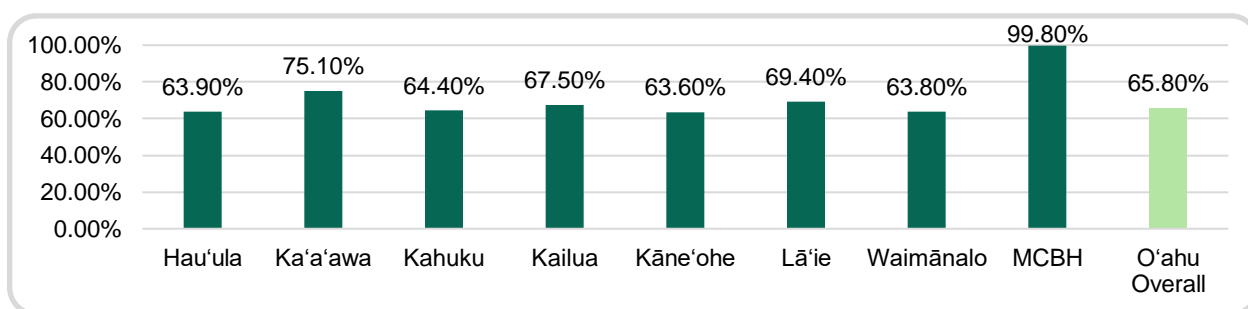
Employment Status	O'ahu Overall		Windward O'ahu	
	Estimate	Percent	Estimate	Percent
Population 16 years and over	820,606		108,415	
In labor force	539,759	65.80%	71,919	66%
Civilian labor force	491,644	59.90%	63,050	58%
Employed	468,113	57.00%	60,325	56%
Unemployed	23531	2.90%	2,725	3%
Armed Forces	48115	5.90%	8,869	8%
Not in labor force	280,847	34.20%	36,496	34%

Source: American Community Survey 5-Year Estimates, 2018-2022

LABOR FORCE PARTICIPATION BY ZIP CODE

Figure 5 below illustrates Labor Force Participation rates by ZIP code, highlighting varying levels of workforce engagement across communities. MCBH stands out with an exceptionally high participation rate of 99.80% due to its concentrated military population, followed by Ka'a'awa with 75.10%. The majority of Windward communities cluster around the 63-64% participation rate, while Kailua and Lā'ie have slightly higher participation rates of 67.50% and 69.40% respectively.

Figure 5: Labor Force Participation by Windward O'ahu ZIP Code

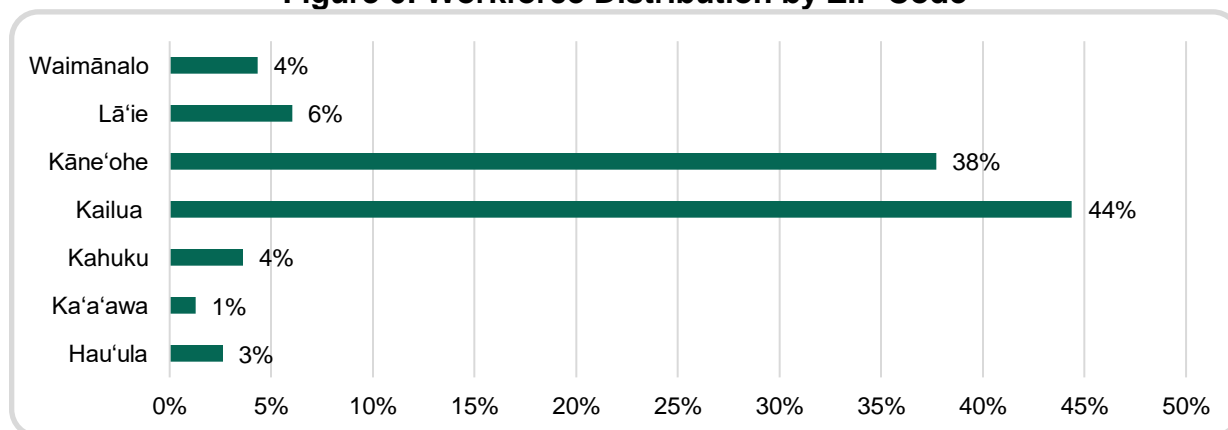


Source: American Community Survey 5-Year Estimates, 2018-2022

WORKFORCE DISTRIBUTION BY ZIP CODE

Figure 6 illustrates the distribution of the workforce across the region, offering insights into where employment is concentrated. Unsurprisingly, there is a concentration of jobs in two major areas: Kailua and Kāne'ohe. These urban centers account for a combined 82% of the total Windward employment opportunities, with Kailua representing the largest share at 44% (10,731 workers) and Kāne'ohe following at 38% (9,116 workers). This distribution underscores the economic prominence of these areas as employment hubs within the region.

Figure 6: Workforce Distribution by ZIP Code

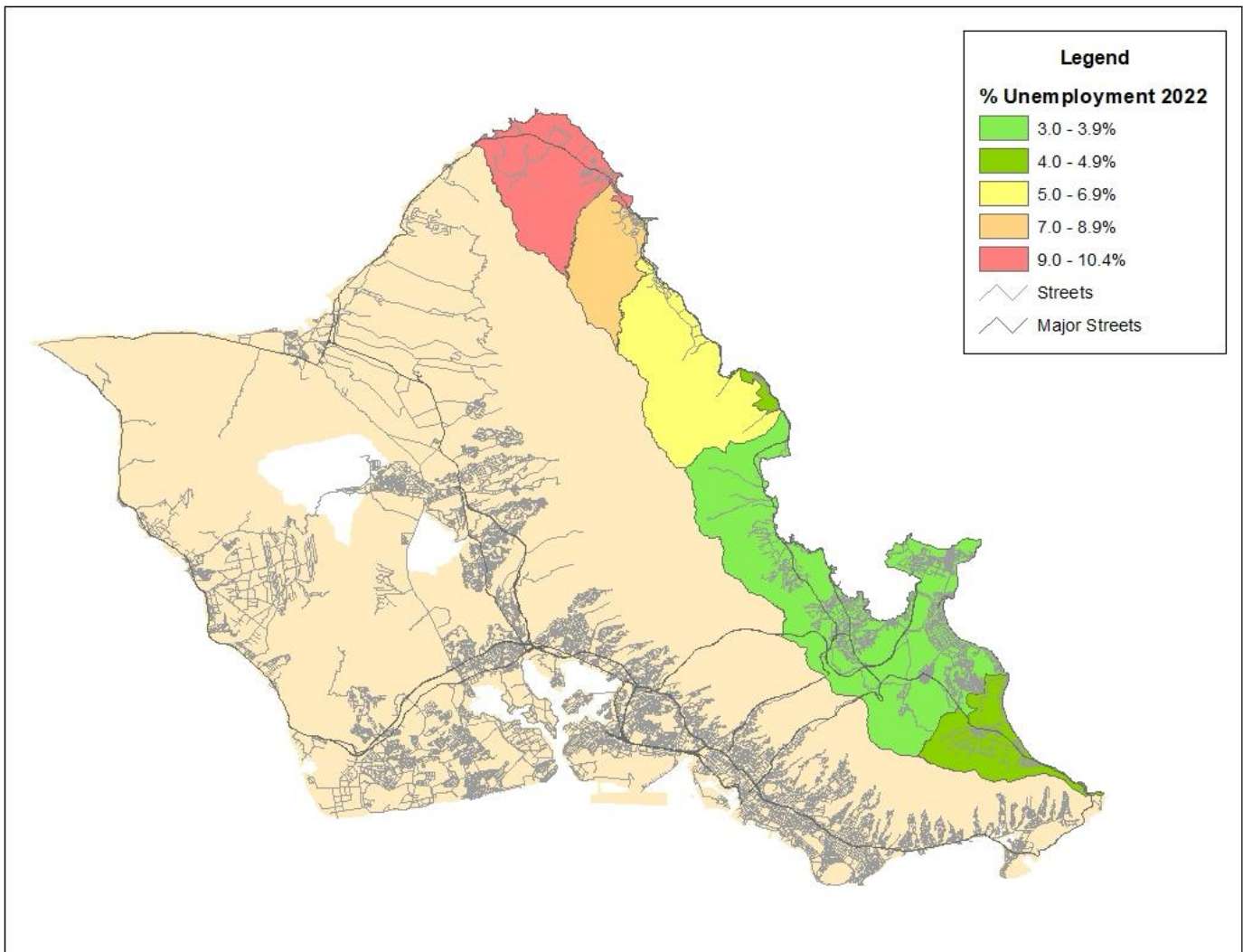


Source: U.S. Census OnTheMap, 2021

UNEMPLOYMENT

Unemployment rates in Windward O‘ahu vary significantly across different areas. The region shows a clear geographical pattern, with northern areas like Kahuku (10%), Lā‘ie (8%), and Hau‘ula (6%) experiencing higher unemployment rates. In contrast, southern areas such as Kailua, Kāne‘ohe, and Waimānalo all report lower unemployment rates of 4%. Unemployment rates track working age individuals who are seeking work but not employed. They do not include those choosing not to work.

Figure 7: Unemployment Rates

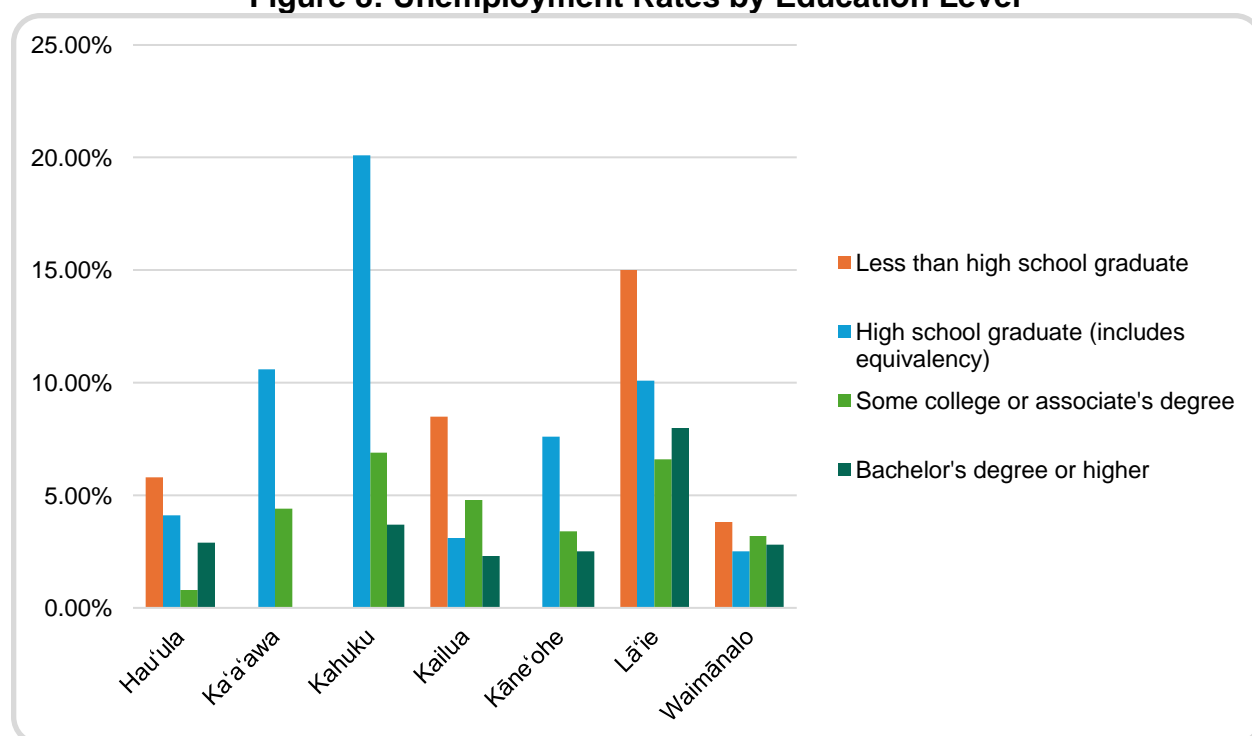


Source: American Community Survey 5-Year Estimates, 2018-2022

Unemployment rates across different areas of Windward O‘ahu also vary by education level. Figure 8 below compares four education categories: less than high school graduate, high school graduate (including equivalency), some college or associate's degree, and bachelor's degree or higher, for seven locations in the region.

The data reveals a clear trend: higher levels of education generally correspond with lower unemployment rates throughout Windward O‘ahu. Those with less than a high school diploma face the highest unemployment rates in most areas, particularly in Lā‘ie where it peaks at about 15%. High school graduates also experience elevated unemployment, most notably in Kahuku at around 20%. In contrast, individuals with some college education or a bachelor's degree consistently show lower unemployment rates across all locations.

Figure 8: Unemployment Rates by Education Level



Source: American Community Survey 5-Year Estimates, 2018-2022³

An inflow/outflow analysis of Windward O‘ahu utilizing the U.S. Census Bureau LEHD Origin-Destination Employment Statistics (LODES) via the [OnTheMap](#) application reveals commuting patterns and employment dynamics in the region. The data shows a substantial outflow of 25,840 Windward residents leaving the area for employment, while 17,932 workers come into the region for jobs. Additionally, 6,246 individuals both live and work within the region. The analysis shows that only about 20% of Windward residents are employed locally, while the vast majority (80%) work outside the region.

³ MCBH is not included in this chart, as the data shows 0% unemployment for MCBH.

Figure 9: Worker Inflow/Outflow Analysis



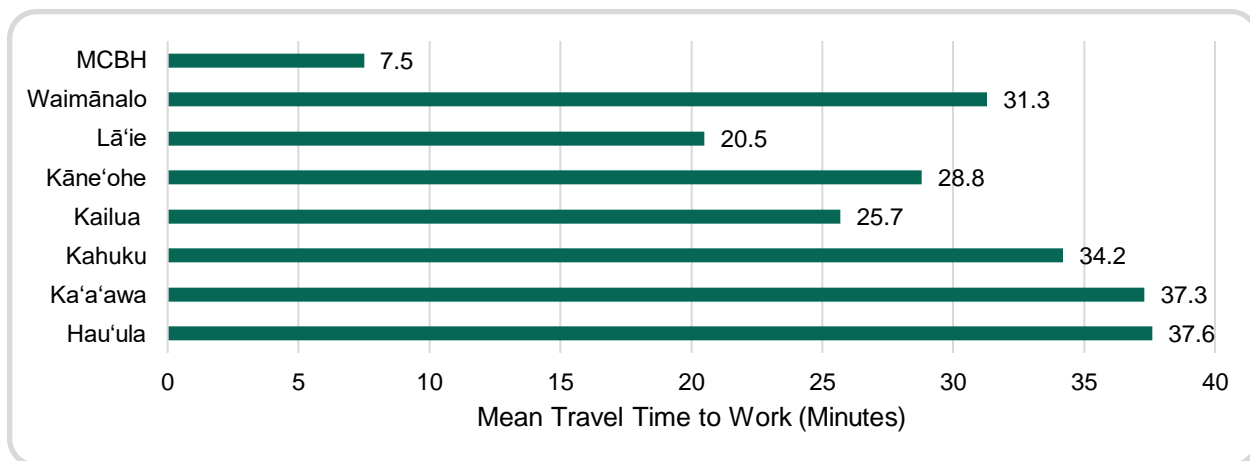
Source: U.S. Census OnTheMap, 2021

RESIDENTS MEAN TRAVEL TIME TO WORK

Average commute times vary widely across the Windward ZIP codes, as shown in Figure 10 below. Northern rural communities face the longest commutes, with Hau'ula residents averaging 37.6 minutes, followed closely by Ka'a'awa at 37.3 minutes and Kahuku at 34.2 minutes. Moving south, commute times generally decrease: Waimānalo averages 31.3 minutes, Kāne'ohe 28.8 minutes, and Kailua 25.7 minutes. Lā'ie stands out with a shorter average commute of 20.5 minutes and Marine Corps Base Hawaii (MCBH) residents have the shortest commute by far, averaging just 7.5 minutes.

This data aligns with the inflow/outflow analysis showing that about 80% of Windward residents work outside the region, likely in Urban Honolulu.

Figure 10: Windward O'ahu Residents Mean Travel Time to Work



Source: American Community Survey 5-Year Estimates, 2018-2022

RESIDENTS MEANS OF TRANSPORTATION TO WORK

Table 4 presents a detailed breakdown of the means of transportation to work for Windward residents, categorized into six transportation modes: car/truck/van, public transportation, walking, bicycle, taxicab/motorcycle/other means, and working from home. Personal vehicle use is the dominant mode of transportation, with 74.39% of residents commuting by car, truck, or van. However, this figure varies significantly between ZIP codes, from a high of 92% in Ka'a'awa to a low of 42% in MCBH. Interestingly, the Windward region shows a slightly lower rate of personal vehicle use compared to the O'ahu average of 78.50%.

Working from home is the second most common category, with 9.66% of residents, which is slightly above the O'ahu average. Lā'ie and Kahuku stand out with 16% and 15% of residents working from home respectively.

Significant variations exist in other transportation modes. Walking to work is particularly prevalent in MCBH (43%) and Lā'ie (22%), far exceeding the regional average of 9.56%. Public transportation usage is highest in Hau'ula at 8% and bicycle use is generally low but peaks in Lā'ie at 7%.

Table 4: Residents Means of Transportation to Work

Region	Car, truck, or van	Public transportation (excluding taxicab)	Walked	Bicycle	Taxicab, motorcycle, or other means	Worked from home
O'ahu Overall	78.50%	6%	5%	1%	3%	8%
Windward	74.39%	3.56%	9.56%	1.55%	1.31%	9.66%
Hau'ula	80.70%	8%	1%	0%	0%	10%
Ka'a'awa	92%	3%	2%	0%	0%	3%
Kahuku	79%	4%	1%	1%	0%	15%
Kailua	84%	2%	3%	1%	2%	9%

Kāneʻohe	84%	3%	1%	1%	1%	10%
Lāʻie	50%	3%	22%	7%	2%	16%
Waimānalo	84%	5%	2%	0%	2%	6%
MCBH	42%	1%	43%	3%	3%	9%

Source: American Community Survey 5-Year Estimates, 2018-2022

WINDWARD OʻAHU RESIDENTS FULL-TIME VS. PART-TIME EMPLOYMENT

Table 5 compares the number of full-time, part-time, and non-working populations in each Windward ZIP code. Overall, Windward’s employment patterns generally align with those of Oʻahu as a whole, with 65% of Windward residents employed full-time and 18% employed part-time.

However, Lāʻie and Kahuku stand out with unusually high rates of part-time employment at 37% and 24% respectively, well above the regional average. In contrast, Kaʻaʻawa has a higher rate of full-time employment (70%) and the lowest rate of individuals not working (15%). The Marine Corps Base Hawaii (MCBH) shows an exceptionally high full-time employment rate of 97%, reflecting the nature of military service.

Table 5: Residents Full-Time vs. Part-Time Employment

Region	Full Time		Part Time		Did Not Work	
	Count	Percentage	Count	Percentage	Count	Percentage
Oʻahu Overall	40,5630	64%	10,5642	17%	12,1941	19%
Windward Oʻahu Overall	53,676	65%	14,838	18%	14,694	18%
Hauʻula	1,544	57%	516	19%	661	24%
Kaʻaʻawa	655	70%	139	15%	144	15%
Kahuku	900	58%	369	24%	285	18%
Kailua	21,352	66%	5,361	17%	5,401	17%
Kāneʻohe	21,404	65%	5,813	18%	5,963	18%
Lāʻie	1,634	39%	1561	37%	1,020	24%
Waimānalo	3,734	63%	1006	17%	1,216	20%
MCBH	2,453	97%	73	3%	4	0%

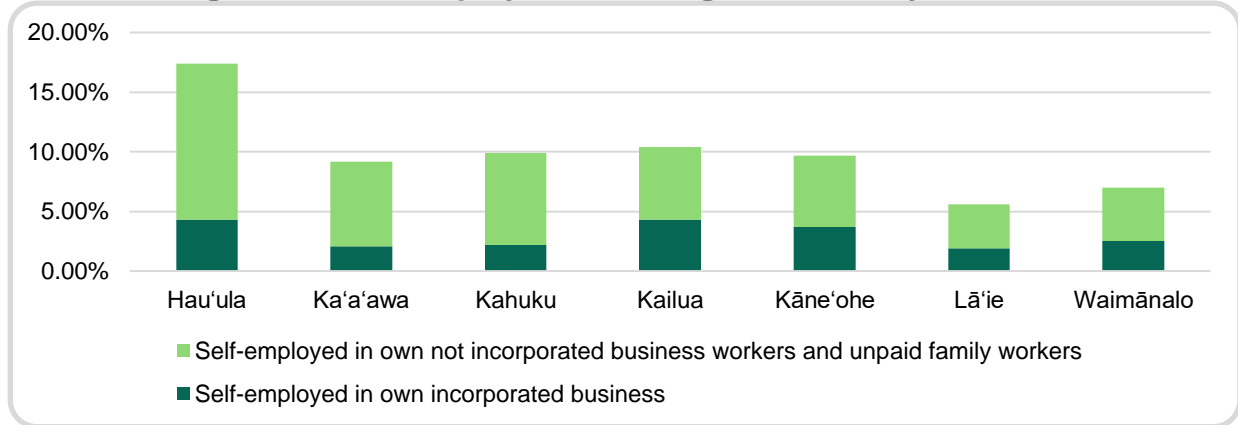
Source: American Community Survey 5-Year Estimates, 2018-2022

SELF-EMPLOYMENT AMONG RESIDENTS BY ZIP CODE

Figure 11 illustrates self-employment rates among residents, distinguishing between two types of self-employment: those working in their own incorporated businesses and those in unincorporated businesses or as unpaid family workers.

Hauʻula emerges as a hotspot for self-employment, showing notably high rates in both categories. Kailua and Kāneʻohe also demonstrate higher rates of incorporated self-employment, while Kaʻaʻawa and Kahuku have elevated rates of unincorporated self-employment.

Figure 11: Self-Employment Among Residents by ZIP Code



Source: American Community Survey 5-Year Estimates, 2018-2022⁴

RESIDENT EMPLOYMENT COMPARED TO WORKFORCE EMPLOYMENT BY INDUSTRY

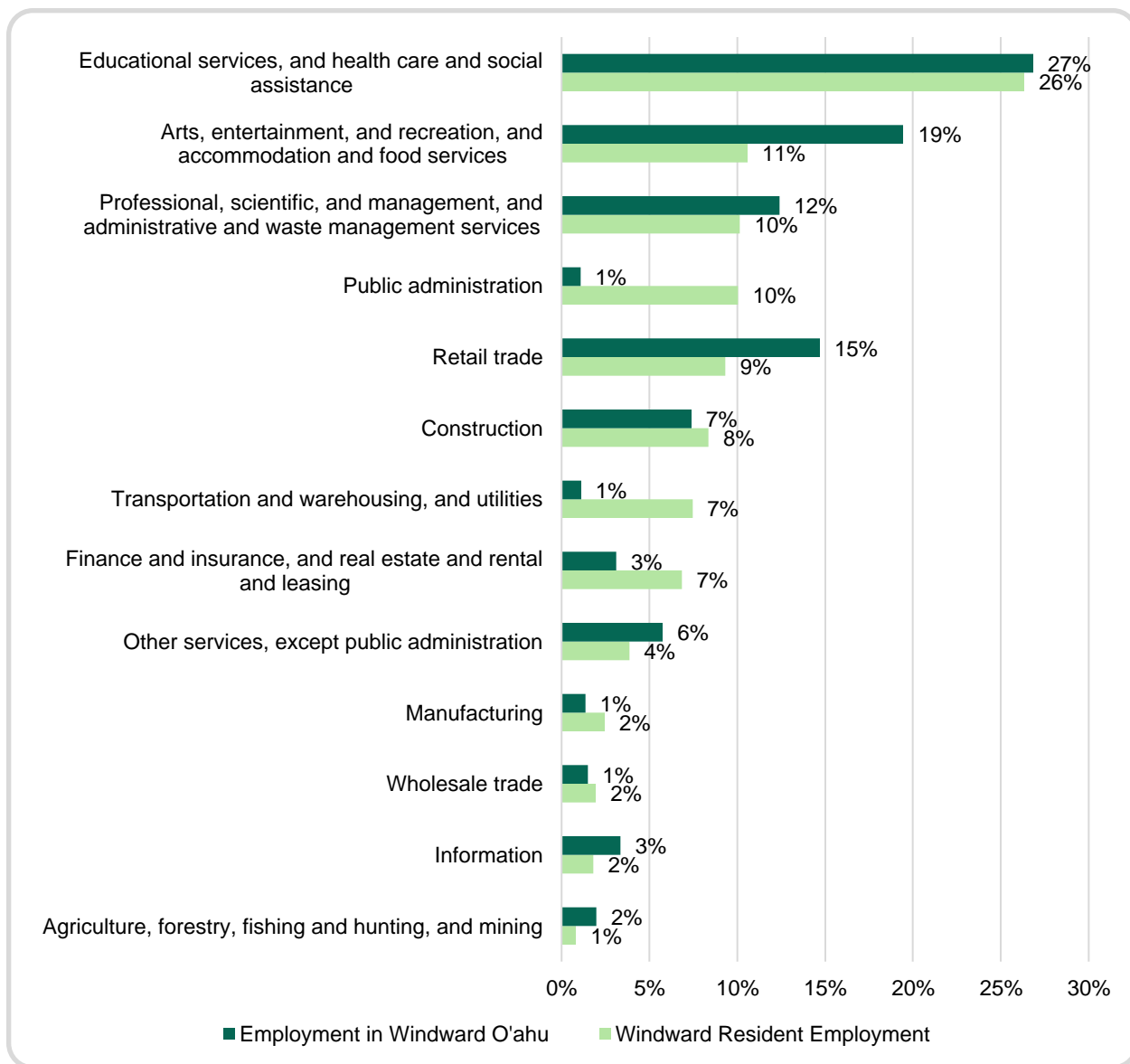
In Figure 12 below, Windward residents' sectors of employment are compared to sectors of employment for workers in the region. For both residents and workers in the region, educational services and health care and social assistance is the dominant industry of employment, showing some alignment between resident skillsets and existing employment in the region for top sectors.

However, for other industry sectors, there are notable disparities between resident and worker employment. For example, a greater share of Windward jobs are in arts, entertainment and recreation and accommodation and food services (19%) compared to Windward residents (11%). Similarly, a greater share of workers in the region are employed in retail trade (15%) compared to residents (9%). These disparities indicate that the hospitality and retail sectors are particularly prevalent on the Windward side and likely source more workers from outside the region.

In contrast, a greater share of Windward O'ahu residents are employed in public administration (10%) compared to employment in the region (1%). Similarly, transportation and warehousing, and utilities accounts for 7% of resident employment versus 1% of worker employment. This suggests that there are fewer employment opportunities in these sectors on the Windward side, meaning that residents with these skillsets have to leave the region to find work.

Figure 12: Resident Employment and Workforce Employment by Industry

⁴ Data on self-employment was not available for MCBH.



Sources:

Windward Resident Employment: American Community Survey 5-Year Estimates, 2018-2022

Employment in Windward O'ahu: U.S. Census OnTheMap, 2021

MOST PREVALENT REGIONAL JOB OPPORTUNITIES

The top sectors of employment for workers vary widely by ZIP code within the region, as shown in Table 6 below.⁵ Employment in healthcare is prevalent throughout the region, but is more concentrated in Kahuku, Waimānalo, Kāne'ohe and Kailua. Accommodation and food service employment is also prominent across Windward O'ahu, especially in Kahuku.

⁵ Worker data from the U.S. Census Bureau OnTheMap application was unavailable for MCBH.

In the northern regions of Kahuku and Lāʻie, employment in arts, entertainment and recreation, as well as educational services, is more prevalent than in other Windward ZIP codes. It should be noted that employment data for educational services likely does not include Hawaiʻi Department of Education (HIDOE) employment, which would represent an estimated 2,000 jobs across all Windward ZIP codes.

In the central areas of Hauʻula, Kailua, and Kāneʻohe, employment in retail trade is more common, while in the southernmost portion of the region, Waimānalo features the highest percentage of workers in the agricultural industry.

Notably, a large share of Kaʻaʻawa's employment is in the public administration industry. In part, this may be due to the presence of Fire Station 21 in Kaʻaʻawa, as fire protection employment is counted under the public administration industry code. Hauʻula has a significant share of employment in administration & support, waste management and remediation. This industry code includes a variety of services, such as facilities support, business support, travel arrangement and reservation services, as well as waste collection, waste treatment and disposal, so it is difficult to pinpoint specific employers in this ZIP code that are contributing to high levels of employment in this industry.

Table 6: Windward Oʻahu Workforce Distribution by Industry and ZIP Code

Industry	Kahuku	Lāʻie	Hauʻula	Kaʻaʻawa	Kāneʻohe	Kailua	Waimānalo
Agriculture, Forestry, Fishing and Hunting	4.70%	4.20%	0.60%	0.00%	0.80%	0.20%	18.70%
Mining, Quarrying, and Oil and Gas Extraction	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.00%
Utilities	0.60%	0.10%	0.00%	0.00%	0.00%	0.50%	0.00%
Construction	3.80%	1.90%	10.00%	8.40%	8.10%	7.70%	7.30%
Manufacturing	0.00%	0.50%	0.00%	0.00%	1.30%	1.80%	1.20%
Wholesale Trade	1.10%	1.20%	0.50%	0.00%	1.20%	1.60%	4.20%
Retail Trade	1.30%	5.60%	10.40%	3.20%	17.40%	16.10%	6.60%
Transportation and Warehousing	0.10%	0.00%	2.40%	0.00%	1.00%	0.80%	0.80%
Information	1.40%	4.10%	0.00%	0.30%	1.10%	5.90%	0.10%
Finance and Insurance	0.70%	0.10%	0.00%	1.00%	1.50%	1.80%	0.50%
Real Estate and Rental and Leasing	1.40%	1.80%	0.00%	0.00%	1.40%	2.10%	0.60%
Professional, Scientific, and Technical Services	0.70%	1.00%	1.40%	0.60%	4.90%	10.70%	4.10%
Management of Companies and Enterprises	0.00%	0.10%	0.30%	0.00%	1.80%	1.50%	0.00%
Administration & Support, Waste Management and Remediation	0.30%	0.20%	43.70%	0.00%	2.90%	3.60%	3.70%

Educational Services	1.00%	25.60%	5.70%	0.00%	2.40%	5.10%	0.00%
Health Care and Social Assistance	37.50%	0.90%	9.80%	0.00%	28.70%	18.40%	29.10%
Arts, Entertainment, and Recreation	14.40%	33.60%	0.00%	0.00%	3.20%	2.00%	6.60%
Accommodation and Food Services	28.40%	13.80%	5.90%	0.60%	14.40%	14.70%	13.20%
Other Services (excluding Public Administration)	2.60%	5.40%	9.30%	1.90%	7.70%	4.60%	3.30%
Public Administration	0.00%	0.00%	0.00%	83.90%	0.00%	0.00%	0.00%

Source: U.S. Census OnTheMap, 2021

KEY TAKEAWAYS

RESIDENT EMPLOYMENT AND ECONOMIC CHARACTERISTICS

- Unemployment rates in Windward O‘ahu vary significantly across different areas, but northern communities like Kahuku, Lā‘ie, and Hau‘ula generally experience higher unemployment rates, offering more opportunity for job seeker development in these regions.
- While job opportunities in the region are diverse, about 80% of Windward residents commute for work outside the region. This results in longer average commute times, especially for residents in northern communities.
- The largest Windward employment sectors are education & healthcare and accommodation & food services.
- Resident employment sectors and regional job opportunities may not always align. Windward residents have significantly higher rates of employment in public administration and transportation, warehousing, and utilities, whereas regional jobs in food service and retail are more prevalent.
- Some industries represent a disproportionate percentage of jobs in different subregions. The northern communities of the Windward side have more job opportunities in education and tourism, the central region has more opportunities in retail, and the southern areas have more agricultural opportunities.

INCOME & EARNINGS

The following section delves into the income and earnings patterns of Windward O‘ahu residents. Income is a broader measure that includes earnings from work as well as other sources such as investments, social security, public assistance, and retirement funds. Earnings, on the other hand, specifically refer to wage or salary income and net income from self-employment.

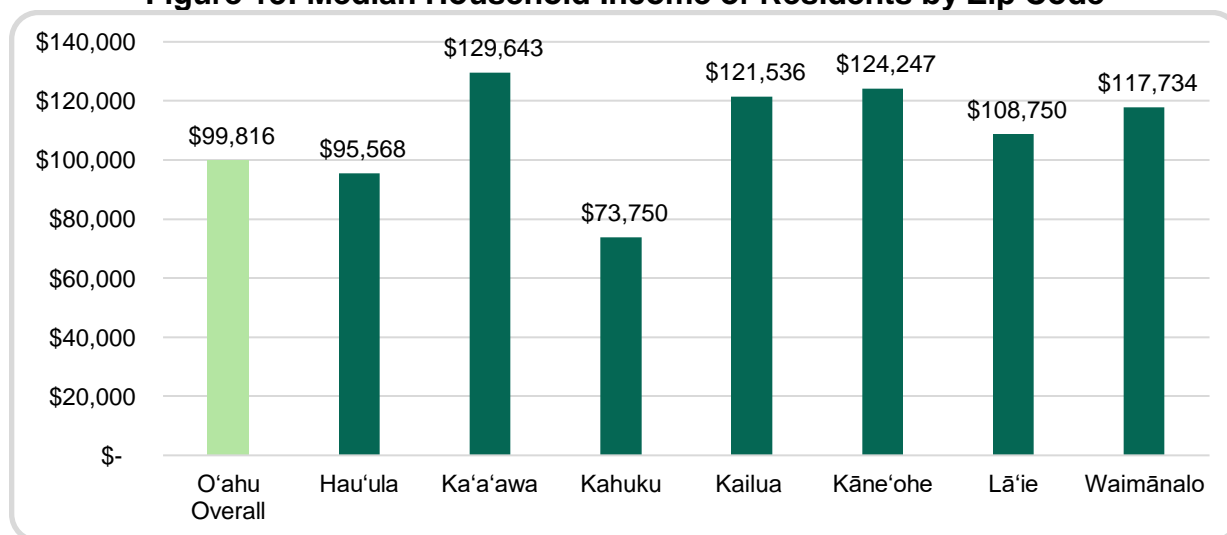
MEDIAN HOUSEHOLD INCOME OF RESIDENTS BY ZIP CODE

The median household income of \$110,175 for Windward residents surpasses the median of \$99,816 for O‘ahu overall. This indicates a generally higher standard of living in the Windward region. However, the chart also exposes significant income disparities by community.

As shown in Figure 13 below, Ka‘a‘awa emerges as the area with the highest median household income, at approximately \$130,000, followed closely by Kailua and Kāne‘ohe, both around \$120,000. These figures reflect the economic strength of these communities, likely tied to their diverse employment opportunities and proximity to job opportunities in Honolulu. In contrast, Kahuku shows the lowest median income at about \$74,000, with Hau‘ula also on the lower end at around \$96,000. This income gap within the region aligns with earlier observations about varying unemployment rates and job opportunities across different areas.

It is important to note that these figures should be interpreted in conjunction with household size data. Lā‘ie, Waimānalo, and Hau‘ula have the largest average household sizes. This factor can significantly impact the perceived standard of living, as household income might be distributed among more individuals in these areas.

Figure 13: Median Household Income of Residents by Zip Code



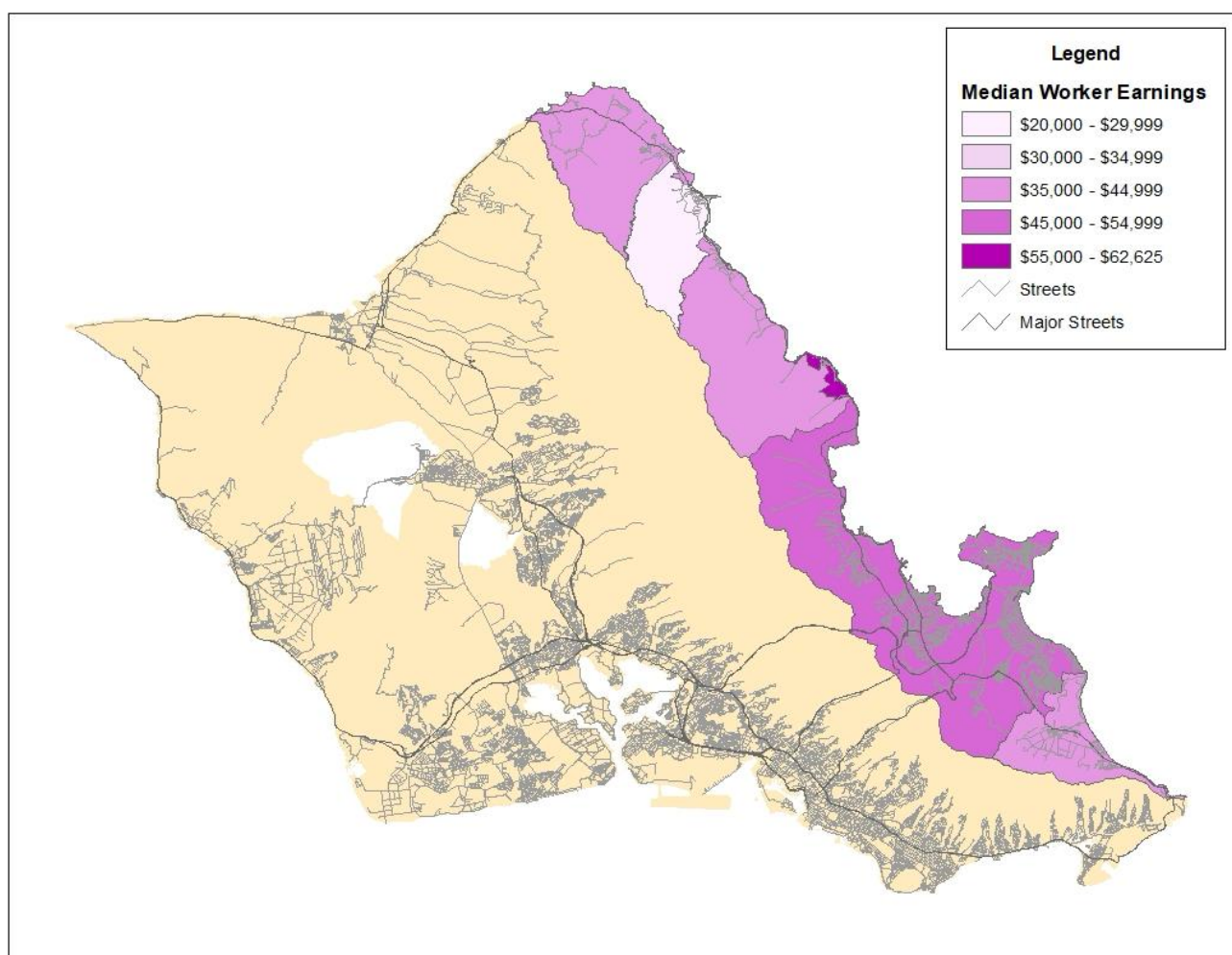
American Community Survey 5-Year Estimates, 2018-2022

MEDIAN WORKER EARNINGS OF RESIDENTS BY ZIP CODE

Overall median worker earnings of \$44,171 for Windward residents are slightly lower than O'ahu's median of \$46,314. Ka'a'awa leads with the highest median earnings around \$63,000, followed by Kailua and Kāne'ohe at about \$52,000 each. In contrast, Lā'ie reports the lowest median earnings at approximately \$22,000, with Kahuku also showing relatively low figures.

Notably, worker earnings in Kahuku and Lā'ie fall below the ALICE (Asset Limited, Income Constrained, Employed) individual survival budget of \$39,384 for a single adult in Hawaii.⁶ This indicates that despite being employed, many residents in these areas struggle to afford basic necessities.

Figure 14: Median Worker Earnings of Windward O'ahu Residents by ZIP Code



Source: American Community Survey 5-Year Estimates, 2018-2022

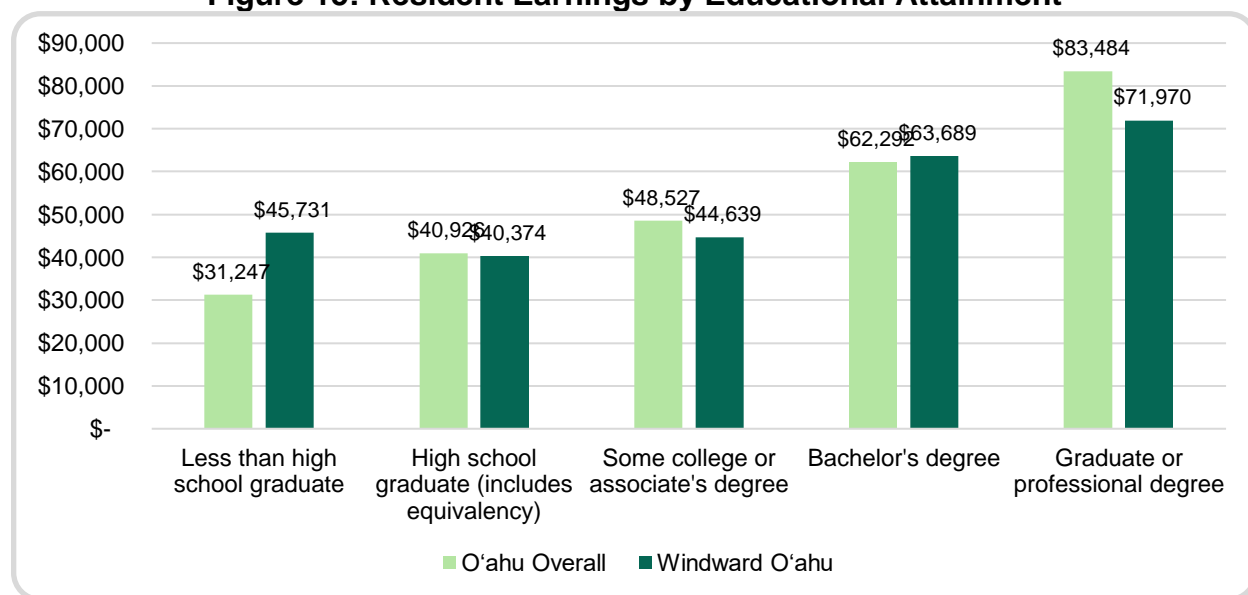
⁶ [ALICE in the Crosscurrents](#), Aloha United Way (2024)

RESIDENT EARNINGS BY EDUCATIONAL ATTAINMENT

Figure 15 illustrates a clear positive correlation between residents' education level and earnings, with graduate or professional degree holders earning the most on the Windward side and island-wide.

Notably, while earnings for those without a high school diploma fall below the ALICE (Asset Limited, Income Constrained, Employed) survival budget for the average single adult residing in O'ahu, this is not the case for Windward O'ahu residents. These patterns suggest that the Windward region may offer better prospects for less educated workers but slightly lower peak earnings for the most educated workers.

Figure 15: Resident Earnings by Educational Attainment



Source: American Community Survey 5-Year Estimates, 2018-2022

MEDIAN RESIDENT EARNINGS BY INDUSTRY

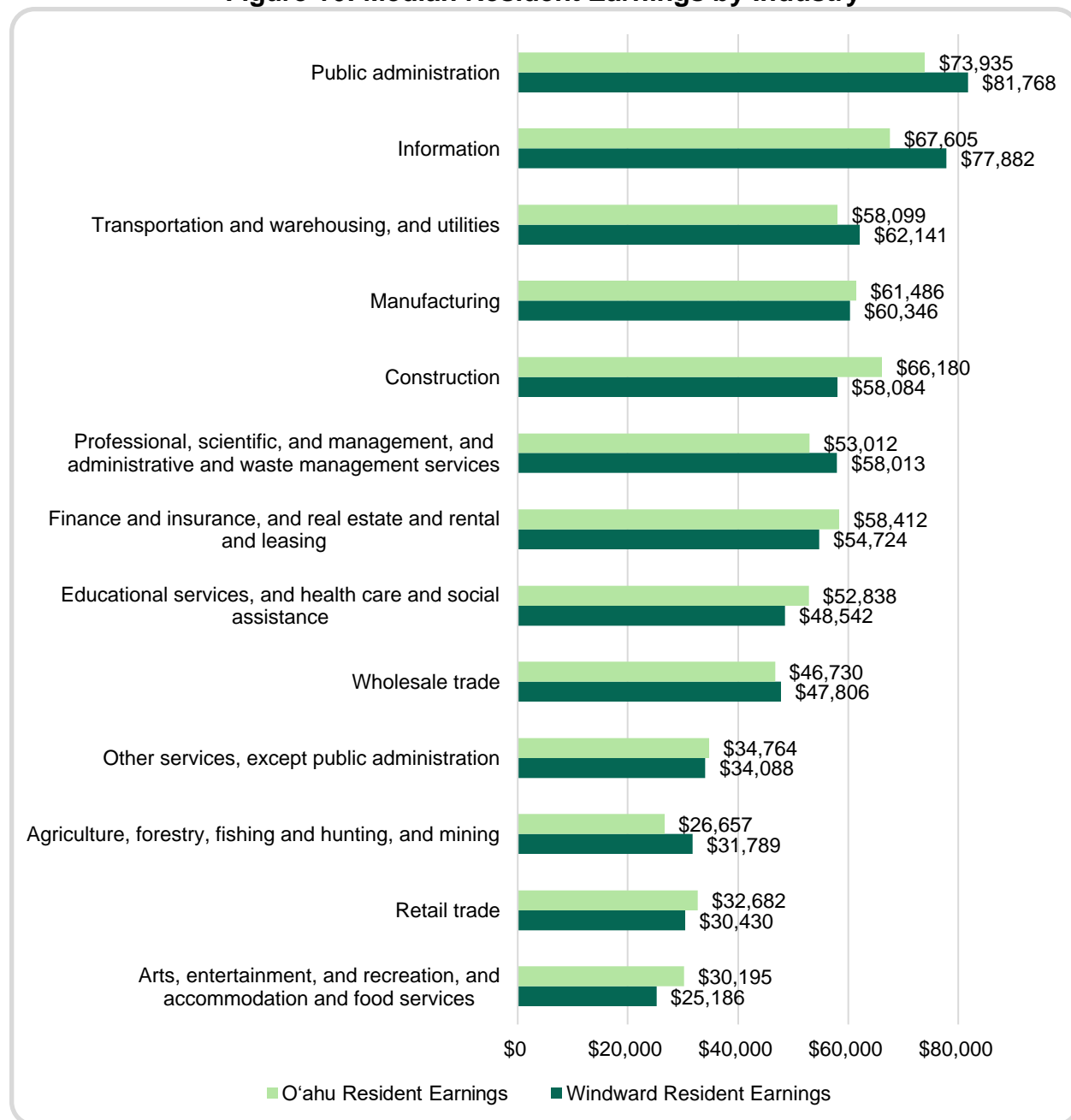
Figure 16 compares median earnings of Windward residents with all O'ahu residents by industry of employment. Public administration emerges as the highest-paying sector for Windward residents with a median income of \$81,768, followed closely by the information sector at \$77,882. These top-earning industries in Windward O'ahu surpass the median earnings for the same sectors in O'ahu overall, suggesting a potential economic advantage for Windward residents in these fields. Transportation, warehousing, and utilities rounds out the top three with median earnings of \$62,141.

On the other end of the spectrum, the arts, entertainment, and recreation industry offers the lowest median earnings at \$25,186, followed by retail trade at \$30,430, and agriculture, forestry, fishing and hunting at \$31,789, which fall below the ALICE survival

budget for a single adult. This stark contrast highlights the economic challenges faced by workers in these industries.

Middle-range earners include those in manufacturing, construction, and professional, scientific, and management services, all clustering around the \$58,000 to \$60,000 range.

Figure 16: Median Resident Earnings by Industry



Source: American Community Survey 5-Year Estimates, 2018-2022

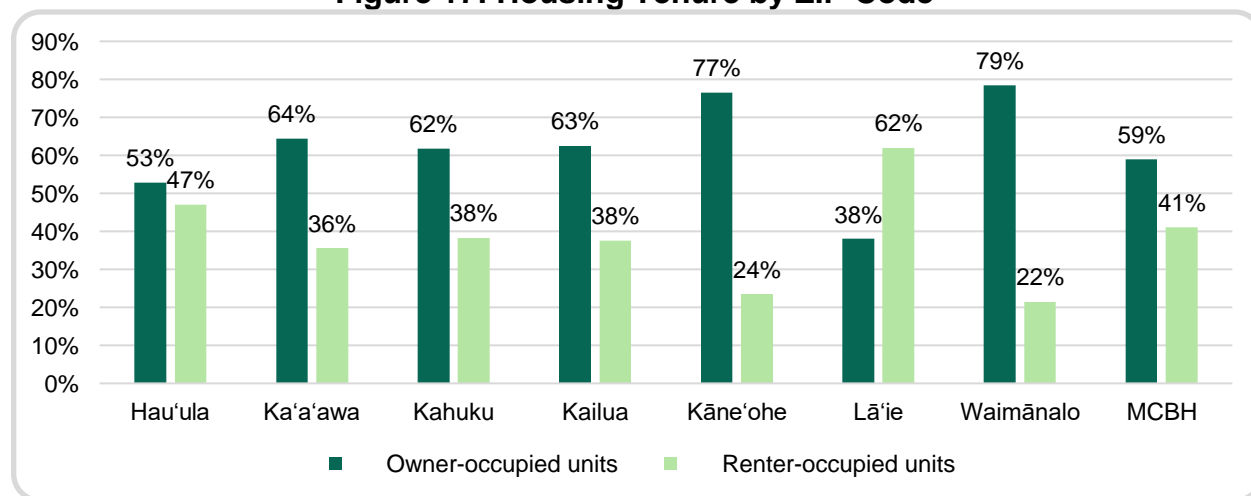
HOUSING TENURE BY ZIP CODE

In terms of housing tenure, the share of residents that own vs. rent their homes varies across Windward ZIP codes, as shown in Figure 17 below. Overall, the region shows a stronger trend towards homeownership compared to O‘ahu as a whole, with 69% of occupied housing units being owner-occupied versus 62% for the entire island. This suggests a generally more stable, long-term residential pattern in the Windward region.

However, Waimānalo and Kāne‘ohe stand out with the highest rates of owner-occupied units, at approximately 80% and 75% respectively, far exceeding the regional and island averages. In contrast, Lā‘ie is the only area where renters outnumber homeowners, with only about 38% of units being owner-occupied.

High homeownership rates in Waimānalo and Kāne‘ohe may indicate greater economic stability or less transient communities in these areas, while the anomaly in Lā‘ie suggests unique local circumstances, possibly related to the presence of a university.

Figure 17: Housing Tenure by ZIP Code



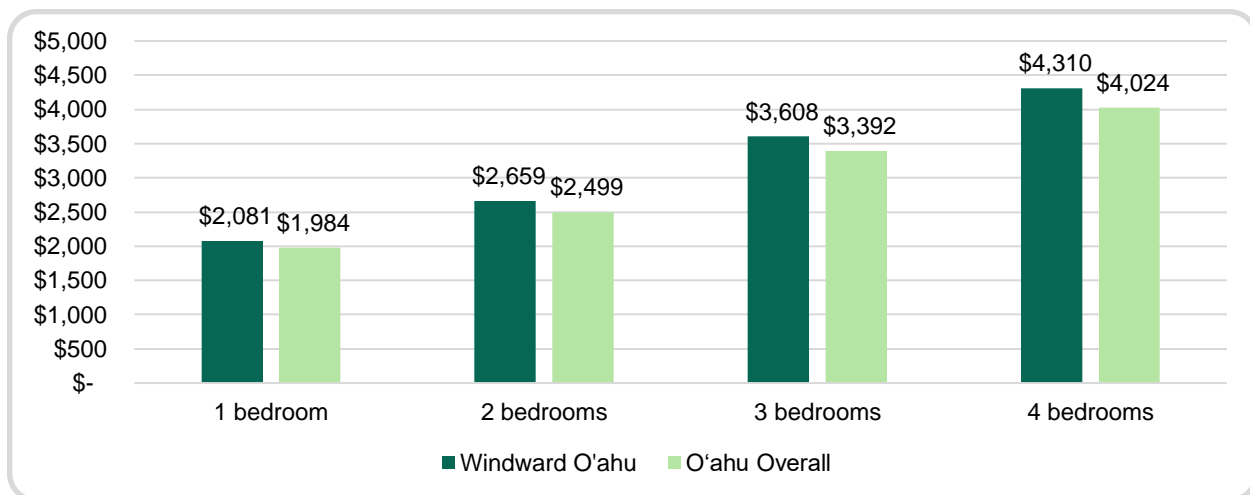
Source: American Community Survey 5-Year Estimates, 2018-2022

AVERAGE MONTHLY RENT IN WINDWARD O‘AHU

Figure 18 compares average rental costs by unit size in Windward O‘ahu to O‘ahu overall, illustrating higher rental housing costs on the windward side for all unit types.

Higher rental costs in the region likely reflect several factors, including the area's desirability, limited housing supply, and higher property values. This data underscores the economic challenges that renters in the region may face, particularly in sought-after areas like Kailua. It also suggests a need for more housing options and potential affordability measures to ensure a balanced community.

Figure 18: Average Monthly Rent by Unit Size



Source: Hawaii Housing Planning Study Renter Survey, 2023

KEY TAKEAWAYS

WINDWARD INCOME & EARNINGS

- The median household income in Windward O'ahu is higher than O'ahu overall, but Kahuku and Hau'ula have notably lower household incomes than other Windward ZIP codes.
- Median individual earnings in the region are only slightly lower than O'ahu overall. However, earnings in specific zip codes, such as Kahuku and Lā'ie, fall below the ALICE survival budget for a single adult (\$39,384).
- Windward residents working in public administration, information, and transportation/utilities have the highest median earnings, while median earnings in the arts, entertainment & recreation, retail, and agricultural industries are below the ALICE survival budget.
- Rent is more expensive in the Windward region compared to the rest of O'ahu, which represents a significant barrier for residents to live and work in the region, particularly those employed in lower paying industries.

JOB OPPORTUNITIES

To gain a better understanding of the current, in-demand job opportunities in Windward O‘ahu, prominent employers in the region were identified and a snapshot analysis of job postings was conducted. Additionally, qualitative insights from employers on their current workforce needs were collected via interviews.

MAJOR EMPLOYERS

The largest employers in each Windward O‘ahu ZIP code are listed in Table 7 below. These employers were identified using HireNet Hawai‘i’s employer search tool. More specific employee numbers from stakeholders who participated in interviews are also included, as well as data from secondary online sources.

In general, some of the largest employers in Windward O‘ahu are in tourism and recreation, food service, healthcare, retail, and education, aligning with the top sectors of employment for workers in the region. Major employers include Adventist Health Castle in Kailua, Kāne‘ohe Marine Corps Base Hawai‘i (MCBH), Kualoa Ranch in Ka‘a‘awa, and Turtle Bay Resort and Polynesian Cultural Center in Lā‘ie. The Hawai‘i Department of Education is also one of the largest employers in the region, with approximately 2,000 employees distributed across all the public schools in the region. Together, these employers account for at least 7,000 jobs in the region.

Table 7: Largest Employers in Windward O‘ahu by ZIP Code

Hau‘ula		
Business Name	Business Description	Employees
Hauula Elementary	Schools	50 to 99
North Shore Tacos	Restaurants	20 to 49
Law Tieng Farm	Herbs	20 to 49
Domino's	Pizza	20 to 49
Asia Pacific Educational Fndtn	Foundation-Educ Philanthropic Research	20 to 49
Tamura's Market	Grocers-Retail	20 to 49
Ka‘a‘awa		
Business Name	Business Description	Employees
Kualoa Ranch	Recreational Facilities	470 ⁷
Kaaawa Elementary	Schools	
International Core Inc	General Contractors-Nonresidential Buildings	10 to 19
7-Eleven	Convenience Stores	10 to 19
Kahuku		

⁷ Estimated number of employees provided by employer via interview.

Business Name	Business Description	Employees
Turtle Bay Resort LLC	Resorts	650 ⁸
Kahuku High & Inter	Schools	
Kahuku Medical Center	Hospitals	50 to 99
Kahuku Elementary	Schools	50 to 99
Kahuku Grill	Restaurants	20 to 49
Beach House by Roy Yamaguchi	Restaurants	20 to 49
Lei Lei's	Restaurants	20 to 49
Keana Farms	Farms	20 to 49
Kailua		
Business Name	Business Description	Employees
Adventist Health Castle	Hospitals	1,000+ ⁹
Honolulu Police Dept-Kailua	Police Departments	100 to 249
Mid Pacific Country Club	Clubs	100 to 249
Women's Community Correctional	Government Offices-States	100 to 249
Zippy's Restaurants	Limited-Service Restaurant	100 to 249
Kalaheo High School	Schools	100 to 249
MCBH Elementary School	Schools	100 to 249
Kailua High School	Schools	100 to 249
Community Quest Learning Ctr	Schools	100 to 249
Le Jardin Academy	Schools	100 to 249
Windward Ford of Hawaii	Automobile Dealers-New Cars	100 to 249
Safeway	Grocers-Retail	100 to 249
Target	Department Stores	100 to 249
Whole Foods Market	Grocers-Retail	100 to 249
Kāneʻohe		
Business Name	Business Description	Employees
Marine Corps Base Hawaii	Military Base/Government	1,000+ Civilian Jobs ¹⁰
Castle Medical Ctr	Diagnostic Imaging Centers	100 to 249
Zippy's Kaneohe	Restaurants	100 to 249
Ann Pearl Nursing Facility	Nursing & Convalescent Homes	100 to 249
S W King Intermediate School	School	100 to 249
Aloha Nursing & rehab Ctr	Nursing & Convalescent Homes	100 to 249
James B Castle High School	School	100 to 249
Business Name	Business Description	Employees

⁸ Estimate number of employees provided by employer via interview.

⁹ Estimated number of employees sourced from employer website.

¹⁰ Estimated number of employees sourced from employer interviews and survey.

Hawaiian Electric Co Inc	Electric Companies	100 to 249
Safeway	Grocers-Retail	100 to 249
Pohai Nani Good Samaritan	Convalescent Homes	100 to 249
Windward Community College	Community College	51 to 200
Lā'ie		
Business Name	Business Description	Employees
Polynesian Cultural Center	Leisure, Travel & Tourism	2,000+ ¹¹
Laie Elementary School	Schools	100 to 249
Brigham Young University	Schools-Universities & Colleges Academic	100 to 249
Hawaii Reserves Inc	Real Estate Management	50 to 99
Pounders Restaurants	Pizza	50 to 99
Western Union Agent Location	Money Order Service	50 to 99
Waimānalo		
Business Name	Business Description	Employees
Hawaii Job Corps Center	Schools-Trade & Vocational	250 to 499
Hawaii Pacific Univ Oceanic	University-College Dept/Facility/Office	100 to 249
Sea Life Park Hawaii	Aquariums-Public	100 to 249
Hawaii Energy System	Energy Management Systems & Products	50 to 99
Waimanalo Health Ctr	Clinics	50 to 99

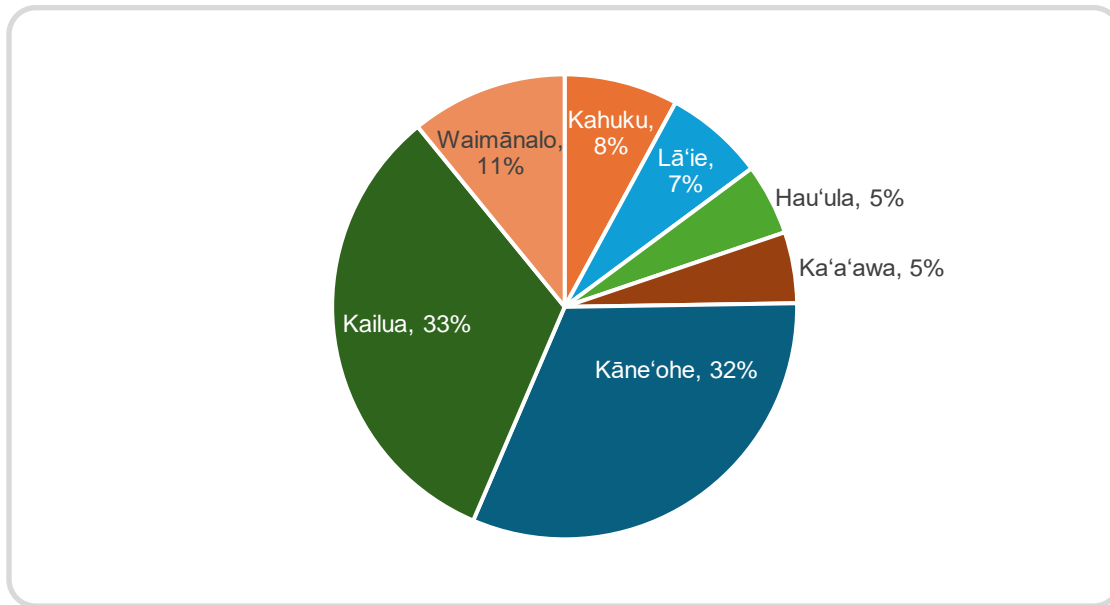
JOB POSTINGS SNAPSHOT ANALYSIS

To better understand current job openings in the region, a snapshot analysis of job postings for Windward O'ahu ZIP codes was conducted using HireNet Hawai'i's job postings search tool. Job postings were filtered by ZIP code and de-duplicated. The job postings search was conducted during the week of July 10, 2024, and yielded 828 job postings.

As shown in Figure 19, the majority of job postings in Windward O'ahu were for employment opportunities in Kailua (33%) and Kāne'ohe (32%), which aligns with the resident and worker distribution patterns in the region.

Figure 19: Share of Job Postings by Windward O'ahu Zip Code

¹¹ Estimated number of employees sourced from employer LinkedIn page.



HireNet Hawai'i automatically classified a subset of the Windward O'ahu job postings by their occupation type ($n = 256$). The most common occupation types in this sample were Healthcare Practitioners and Technical Occupations (17%), Management Occupations (14%), and Food Preparation & Serving Related Occupations (10%). Notably, the Windward O'ahu region had a higher share of healthcare job postings than O'ahu overall, reaffirming the high demand for healthcare workers in the region.

The prevalence of these occupations types also varied by ZIP code. For example, job postings for healthcare occupations were more prominent in Kahuku (29%) and Kailua (24%). Management job postings were more common in Hau'ula (28%), Lā'ie (27%) and Kahuku (26%). Food preparation job postings were more common in Kailua (14%), Kāne'ohe (12%), and Lā'ie (12%).

Table 8: Top 5 Occupation Types in Windward O'ahu Job Postings

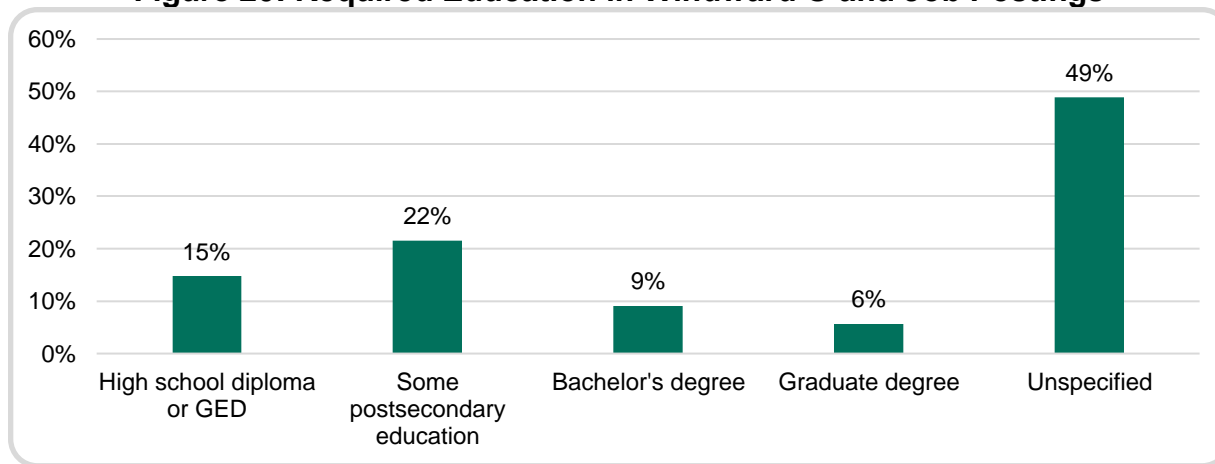
Occupation Type	Windward O'ahu		O'ahu Overall	
	Count	Percentage	Count	Percentage
Healthcare Practitioners and Technical Occupations	77	17%	688	13%
Management Occupations	63	14%	771	15%
Food Preparation and Serving Related Occupations	46	10%	372	7%
Computer and Mathematical Occupations	37	8%	266	5%
Office and Administrative Support Occupation	33	7%	524	10%

To examine the distribution of education levels associated with Windward O'ahu job postings, a subset of job postings was catalogued by education requirements ($n = 88$) across the different occupation types and zip codes.

Nearly half (49%) of the sampled job postings did not specify any education requirement. Twenty two percent (22%) of job postings required some post-secondary education, such as vocational training or an associate degree, while 15% required a

high school diploma or GED, 9% required a bachelor's degree, and 6% required a graduate degree.

Figure 20: Required Education in Windward O'ahu Job Postings



Examples of job postings sampled for each education level, and their associated salaries, are listed in Table 9 below. Salary ranges generally tend to increase with the required level of education. Notably, there are many healthcare job opportunities that require some post-secondary education (not a bachelor's degree), but offer competitive pay. Moreover, there are many opportunities for healthcare workers to upskill, such as from a Medical Assistant to a Licensed Professional Nurse, to a Registered Nurse, and subsequently increase their earning potential.

Table 9: Sample Job Postings by Education Level

Education Level	Sample Job Postings	Salary
High School Diploma or GED	Sales & Customer Service Associate	\$29,000-\$50,000
	Security Officer	\$36,000
	Educational Assistant	N/A
	Residential Advisor	\$41,600
	Food Expeditor	\$39,000
	Cook	\$35,000-\$39,000
Some Post-Secondary Education	Medical Assistant	\$37,000-\$49,000
	Special Education Teacher	\$38,000-\$64,000
	Certified Nurse Aide	\$43,000-\$60,000
	Cath Lab Technologist	\$54,000-\$77,000
	CDL Driver	\$62,000
	X-Ray Tech	\$81,000-\$100,000
	Registered Nurse	\$91,000-\$120,000
	Radiologic Technologist	\$107,000-\$117,000
Bachelor's Degree	Academic Instructor	\$48,000-\$50,000
	Director of Sales & Marketing	\$90,000-\$160,000
	Director of Operations	\$139,000-\$175,000
	Regional Maintenance Director	\$139,000-\$175,000

	Director of Finance and Accounting	\$184,000-\$237,000
Graduate Degree	Dentist	\$81,000-\$100,000
	Occupational Therapist	\$84,000-\$103,000
	Assistant or Associate Professor Faculty Position	\$109,000-\$130,000
	Speech Language Pathologist	\$119,000

WORKFORCE NEEDS

AE Consulting and Hawai'i Workforce Pipeline conducted interviews with 7 prominent Windward O'ahu employers and business leaders in various industries to gain insight into their workforce needs, particularly the high volume or hard-to-fill job roles that represent significant employment opportunities for Windward O'ahu residents.

The top workforce needs shared by Windward employers are summarized by industry below.

Healthcare:

AE Consulting and Hawai'i Workforce Pipeline interviewed a large Windward healthcare employer. The majority (70%) of this employer's workforce lives in Windward O'ahu. The employer shared that they are constantly recruiting entry-level employees, particularly Nurse Aides, due to high turnover. There is also a need for more specialized positions, including Specialty Nurses, Doctors, Imaging, Surgical Techs, Sterile Processing Technicians, and Cath Lab Technicians. In some cases, these positions are difficult to fill because of a lack of local training availability. Experienced Registered Nurses are also in high demand, given the limited candidate pool on island.

Tourism & Recreation:

Two large Windward employers in tourism and recreation were interviewed. One of the employers offers outdoor tours and has a need for both tour operations staff and agriculture workers. At least 75% of their workforce resides in Windward O'ahu. On the tour operations side, in-demand roles include Zip Line Tour Guides and Ticket Office staff who provide customer service for reservations. Retention has been a challenge for both of these roles. On the agriculture and land stewardship side, there is a need for entry-level Stewardship Field Technicians, as it can be difficult to find candidates who enjoy working outdoors and are able to meet the demands of the job.

Another tourism and recreation employer on the Windward side has significant employment needs in culinary and housekeeping. In culinary, there is a need for various cooks (e.g., breakfast cooks, dinner cooks, pastry cooks). These positions are particularly hard to fill given the employer's more rural location and shortage of qualified talent in the area.

Military Base: A military base in the Windward O'ahu region offers various civilian employment opportunities, including blue collar (skilled trades) and white collar jobs. One of the highest volume employment opportunities for civilians on the base is federal police. Opportunities in skilled trades include maintenance workers, painters, motor vehicle operators, pest control workers, plumbers, and mechanics. Finding candidates for these

trades that have sufficient experience has been a challenge. There are also community service-related positions available for civilians on the base, with childcare workers in particularly high demand.

Education: AE Consulting reviewed [open job postings](#) for Windward O'ahu HIDOE schools to gauge the jobs with the highest current demand. Job roles with the most open postings in Windward schools included Educational Assistants, Office Assistants, and Custodians.

KEY TAKEAWAYS

WINDWARD JOB OPPORTUNITIES

- Windward O'ahu is home to prominent employers in tourism and recreation, food service, healthcare, retail, and education, aligning with the top sectors of employment for workers in the region.
- An analysis of open job postings on the Windward side found that the most common occupation types were healthcare, management, and food service.
- Healthcare is a prime area to focus workforce development efforts, given the high regional demand. Moreover, many healthcare roles do not require a bachelor's degree but offer relatively high pay compared to other industries.
- The Kāne'ohe Marine Corps Base represents many opportunities in the skilled trades and early childhood education that have minimal education requirements but offer competitive pay and government employment benefits. Many Windward residents may not be aware of these opportunities, and ensuring availability of regional training for these roles is essential.

TRAINING & EDUCATION LANDSCAPE

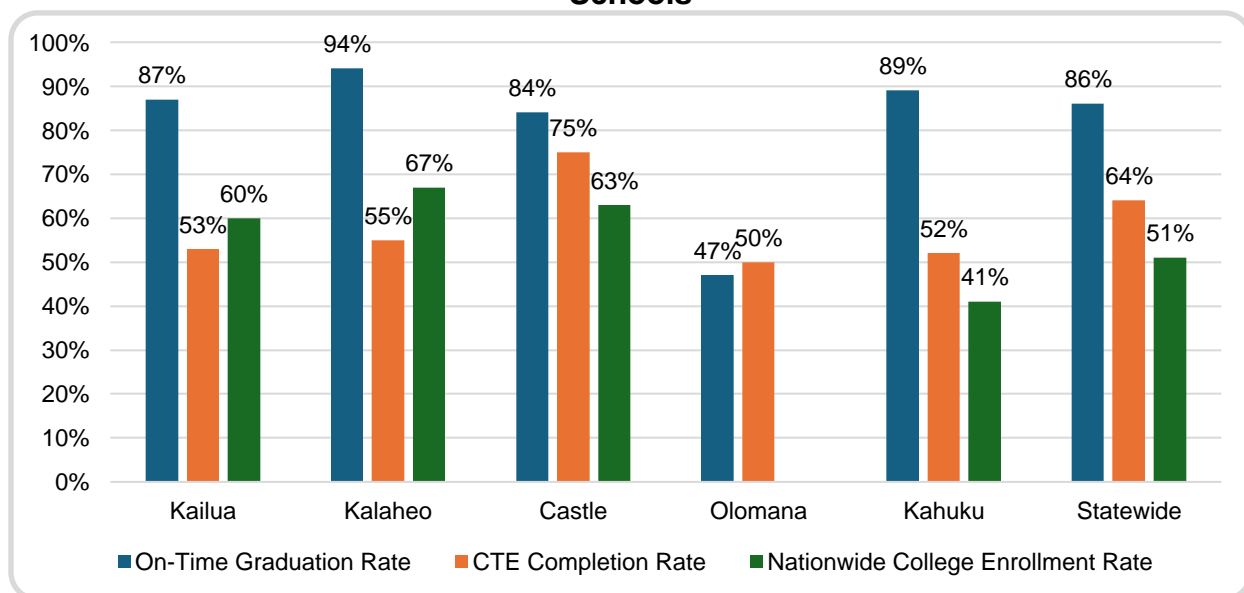
The education and training landscape of the Windward O‘ahu region comprises Hawai‘i Department of Education (HIDOE) schools, Windward Community College in Kāne‘ohe, and Brigham Young University-Hawaii in Lā‘ie. There are also a variety of vocational training programs in the region.

HIDOE SCHOOLS

There are five HIDOE high schools in Windward O‘ahu: Kailua High, Kalaheo High, Castle High, Olomana School, and Kahuku High & Intermediate. Olomana, Kailua, and Kahuku are Title I schools, meaning at least 47.2% of their student population comes from low-income families. Olomana School serves incarcerated youth at the Hawaii Youth Correctional Facility and at-risk students at the Olomana Youth Center.

Figure 21 below shows how Windward O‘ahu HIDOE high schools performed on several College & Career Readiness Indicators compared to the statewide average in 2023. Overall, HIDOE high schools in Windward O‘ahu had similar or higher on-time graduation rates than the statewide average (86%), with the exception of Olomana School (47%). The majority of HIDOE schools in the region had lower Career & Technical Education (CTE) completion rates than the statewide average (64%), although Castle had a higher CTE completion rate at 75%. In terms of college enrollment post-graduation, Kailua, Kalaheo, and Castle had higher rates than the statewide average (51%), while Kahuku had a lower college enrollment rate (41%).

Figure 21: College & Career Readiness Indicators – Windward HIDOE High Schools



Source: College & Career Readiness Indicators, Hawai‘i DXP (2023)

CTE Pathway and Program of Study Offerings vary by HIDOE high school in the region. CTE offerings tend to differ between schools depending on student interest and

educator availability. Some of the most common Programs of Study offered by Windward HIDOE high schools include Digital Design, Culinary, Residential/Commercial Construction, Food Systems, Nursing, and Engineering Technology.

Table 10: Windward HIDOE High Schools' CTE Programs of Study SY 2024-2025

Pathway	Program of Study	Kahuku	Castle	Kalaheo	Kailua	Olomana
Advanced Manufacutring	Automation-Robot					
	Electro-Mechanical					
	Welding					x
Ag., Food., Nat. Res.	Food Systems	x			x	x
	Ag. Food Production		x			
	Natural Resource Management			x		
	Animal Systems					
Arch. Design & Eng. Tech	Engineering Technology		x	x	x	
	Architecture Design					
Build & Construct	Res/Comm Construction	x		x	x	x
	Mech/Electric/Plumb					
Cultural Arts/Media/Ent	Digital Design	x	x	x	x	x
	Fashion & Artisan Design				x	
	Film & Media Production	x		x		
Bus. Mgmt/Fin/Market	Business Management					
	Entrepreneurship	x	x			
	Financial Mgmt					
	Marketing Mgmt					
	Supply Chain Logistic Mgmt.					
Health	Nursing	x	x	x		
	Public Health				x	
	Human Therapeutic Performance					
	Emergency Services					
	Diagnostics					
Hospt./Tourism/Rec.	Culinary	x	x	x	x	x
	Sustainable Hospt./Tour Mgmt					
Information Tech	Programming				x	
	Artificial Intelligence	x				
	Web Design					
	Cybersecurity					
	Networking					
Pathway	Program of Study	Kahuku	Castle	Kalaheo	Kailua	Olomana

Transportation	Automotive Maintenance	x	x
	Automotive Collision		
	Aviation Tech		
	Marine Tech		

Source: HIDOE [Career & Technical Education](#)

The HIDOE high schools also offer various industry-recognized credentials (IRCs) to help their students prepare for post-secondary education or the workforce once they graduate. AE Consulting reached out to the principals of the HIDOE schools to learn about the industry credentials they offer to students. Examples of IRCs offered are listed in Table 11 below.

Table 11: Sample Industry-Recognized Credentials

Relevant Industry	Credentials Offered
General	Google Suite Microsoft Office Suite
Health	CPR/First Aid Basic Life Support CPR HIPPA Blood Pressure Medical Assistant Certification (Dual Credit)
Construction/Transportation	OSHA 10 Automotive-ASE
Arts	Adobe Illustrator Adobe Photoshop
Hospitality	ServSafe

Principals of Windward HIDOE schools were also asked to share their current needs in terms of preparing their students for the workforce after graduation. Needs that emerged include work-based learning opportunities (WBL) for students to explore career interests and pathways, internships leading to entry-level jobs, and support with providing IRCs.

VOCATIONAL TRAINING & APPRENTICESHIPS

Apprenticeships are earn-and-learn training programs that provide pathways to high-paying careers in various sectors, including construction; installation, maintenance, and repair; manufacturing; and transportation. The Hawai'i Department of Labor & Industrial Relations (DLIR) offers registered apprenticeship programs in various trades statewide.

On the Windward side, the Operating Engineers Local 3 Training Center is based in Kahuku. There are three types of apprenticeships available through the training center: Heavy Duty Repairers and Welders, Construction Equipment Operators, and Paving Equipment Operators.

The Hawai'i Job Corps Center, located in Waimānalo, offers vocational training to youth and young adults aged 16 to 25. About 20% of their student population are Windward O'ahu residents; many of their participants come from the Federated States of Micronesia or West O'ahu. The Job Corps currently offers training in Culinary, Automotive, Basic Construction, Landscaping, Painting, Security, and Business. They also recently developed a new training program in partnership with CVS that prepares students to become certified pharmacy technicians.

Job Corps programs are typically 18 months, and students earn industry-recognized credentials as part of their training. Many students enlist in the military after completing their program, while others seek employment or continue their education. The Job Corps has had success with job placements in security and landscaping, as well as construction, where candidates may be able to find unionized employment. They are looking to expand employer partnerships for their business program to provide internships related to office administration.

UH COMMUNITY COLLEGES

Windward Community College (WCC) is the region's UH Community College Campus. WCC works with all of the HIDOE high schools in the region to offer Early College/Dual Credit programs. For example, Castle High School offers Medical Assistant certification through WCC.

WCC offers both credit and non-credit programs. Many students pursue Associate of Arts (AA) degrees and transfer to a 4-year college after graduation. Through the Good Jobs Hawai'i initiative, WCC has been able to expand their workforce training programs in areas such as Healthcare, Arborist/Landscaping, and Business & Computers. In addition to funding tuition costs for Hawai'i residents, the Good Jobs Hawai'i funding covers wraparound services for students and other costs associated with their training, such as tools and transportation. WCC staff shared that because of this support, many students completed trainings and entered the workforce who otherwise would not have been able to do so due to financial constraints.

WCC also partners with various employers in the region to develop new programs that address their workforce needs. For example, when the Hawai'i State Hospital in Kāne'ohe came to WCC with a need for trained mental health technicians, WCC collaborated with them to stand up a new Mental Health Technician Certificate program. Adventist Health Castle is another prominent industry partner for WCC; many of their healthcare program graduates go on to work at Adventist Health Castle.

FOUR-YEAR INSTITUTIONS

Brigham Young University-Hawaii in Lā'ie is the only 4-year post-secondary institution in Windward O'ahu. BYU-Hawaii offers 37 majors and 10 certificate programs. The

Polynesian Cultural Center has a close partnership with BYU-Hawaii to provide employment opportunities for students.

KEY TAKEAWAYS

TRAINING & EDUCATION LANDSCAPE

- HIDOE high schools on the Windward side are in need of industry partnerships to provide their students with work-based learning, internships, and pathways into entry-level jobs. Many of the high schools already offer culinary and construction CTE pathways, representing significant opportunity for industry-education partnerships that align with entry-level regional workforce needs.
- Local job training centers, like the Job Corps in Waimānalo, are always looking for industry partners to connect their trained graduates with internships and employment.
- Windward Community College has a successful record of developing new trainings in collaboration with industry to meet their needs. Continued and increased partnerships between employers and WCC can help to fill regional employment gaps.

WORKFORCE CHALLENGES & STRATEGIES

Through interviews and stakeholder meetings with leading Windward O'ahu employers, several key challenges were identified that are top of mind for employers, as well as strategies they are already implementing to address them. In addition, Hawai'i Workforce Pipeline conducted a survey of Windward businesses ($n = 23$), which included questions on hiring challenges and strategies.

CHALLENGES

- **Competition for Limited Talent:** The total number of O'ahu residents in the workforce continues to shrink due to outmigration, largely driven by the high cost of living, and an aging population. Employers are competing to recruit and retain a limited pool of talent on island, especially qualified workers with the experience needed for mid and senior-level roles.
- **Emerging Generational Challenges:** Several Windward employers are experiencing new challenges as the younger generation enters the workforce, including high pay expectations and candidates failing to show up for interviews or shifts without notifying the employer in advance.
- **High Turnover in Entry-Level Roles:** Many employers reported experiencing high turnover for entry-level job roles. This is likely in part due to the high cost of living in relation to entry-level salaries, particularly in Windward O'ahu, which has some of the highest housing costs on O'ahu.
- **Geographic Barriers:** Given the high housing costs in Windward O'ahu, many workers are unable to afford to live in the region. As a result, they may prefer to hold jobs within a shorter commuting distance to their residence. These geographic barriers are even more pronounced for Windward employers in rural areas, such as Lā'ie, that have limited residents within a short commuting distance.
- **Career Awareness:** Ensuring that Windward O'ahu residents are aware of the variety of job opportunities available in the region is a challenge for many employers.
- **Lack of Local Training for Specialized Roles:** Recruiting local talent for some specialized job roles, particularly in healthcare, is a challenge due to the lack of local training availability. In-demand healthcare job roles that do not have training available on island include Ultrasound Techs and Sterile Processing Techs.

STRATEGIES

- **Competitive Compensation & Benefits:** Employers are continuously reviewing their compensation and benefits to ensure they are competitive and attractive to candidates.
- **Creating Pathways for Career Advancement:** As a recruitment and retention strategy, many Windward O'ahu employers are offering internal training opportunities that allow their workers to upskill and advance to higher level roles.
- **Education-Industry Partnerships:** Several Windward O'ahu employers shared that they are already partnering with local K-12 schools and post-secondary institutions. At the K-12 level, employers are providing work-based learning (WBL) opportunities like participating in career fairs, educator externships, mock interviews, and internships. However, some employers shared that offering WBL and internships can be a challenge due to staff capacity and time constraints. At the secondary level, employers are partnering with post-secondary institutions to develop new training programs and recruit graduates for employment.
- **Student Financial Assistance & Wraparound Support:** Financial assistance and wraparound support enables Hawai'i residents to participate in trainings that would otherwise be inaccessible to them. Windward Community College is currently offering free courses through the Good Jobs Hawai'i initiative, which reduces barriers for students by funding tuition and wraparound support services.

KEY TAKEAWAYS

WORKFORCE CHALLENGES & STRATEGIES

- Windward employers share several major recruitment and retention challenges, including a limited pool of qualified, local talent and high turnover for entry-level roles.
- Employers in the region are implementing several common strategies to address their workforce challenges, including reviewing compensation and benefits, creating pathways for career advancement, and partnering with the HIDOE and Windward Community College.
- Sharing these strategies and establishing best practices among a coalition of Windward employers and education partners could help to leverage shared resources and ensure a unified regional approach.

INDUSTRY ENGAGEMENT

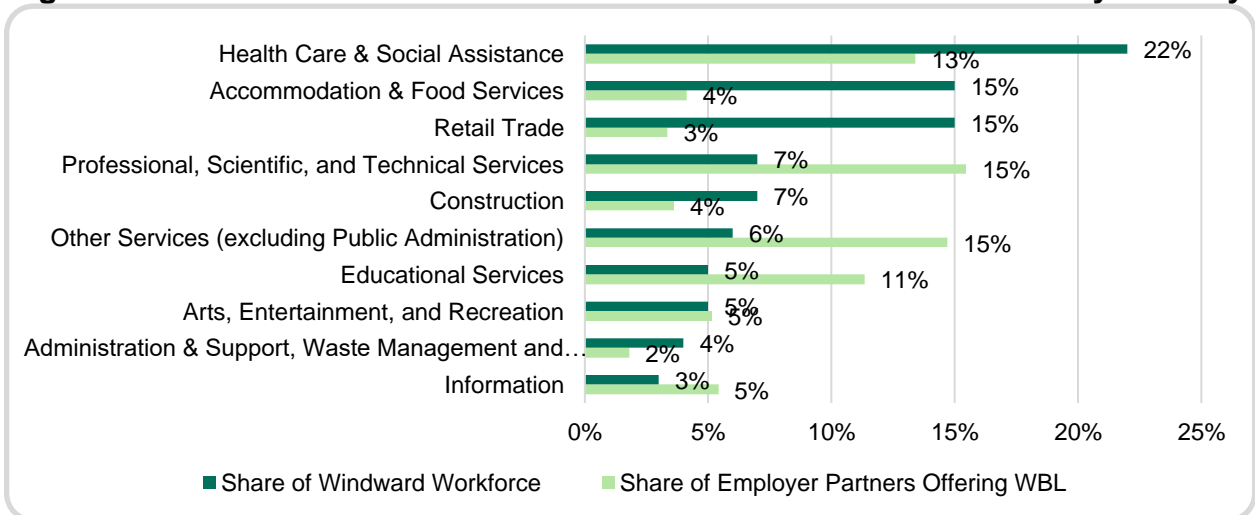
Every Hawai'i Department of Education school has a Work-Based Learning (WBL) Intermediary responsible for connecting teachers and students with employers who offer WBL experiences, such as field trips and internships. Ensuring students have access to a continuum of WBL opportunities, from career awareness and exploration to preparation and training, is essential to preparing Hawai'i's students to enter the workforce.

WORK-BASED LEARNING ENGAGEMENT IN WINDWARD O'AHU BY INDUSTRY

Hawai'i Workforce Pipeline is the Windward Career and Technical Education (CTE) Intermediary. They currently have 388 unique employers in their industry partner database. These employers were classified according to the North American Industry Classification System (NAICS) to determine which industries are most engaged in WBL activities with Windward O'ahu HIDOE schools.

Figure 22 below compares the share of workers in the region's top 10 industry sectors with the share of Windward employers offering WBL activities. The top industries of employment in Windward O'ahu are healthcare & social assistance (22%), accommodation & food services (15%), and retail trade (15%). In contrast, the industries with the most employers offering WBL are professional, scientific, and technical Services (15%), other services excluding public administration (15%), public administration (14%), and healthcare & social assistance (13%). Healthcare may have a lower share of employers offering WBL compared to the regional workforce due to a smaller number of large employers in the region. Compared to the share of workers in the region, accommodation & food services and retail trade are notably underrepresented among employers offering WBL.

Figure 22: Windward WBL Partners vs. Share of Windward Workforce by Industry

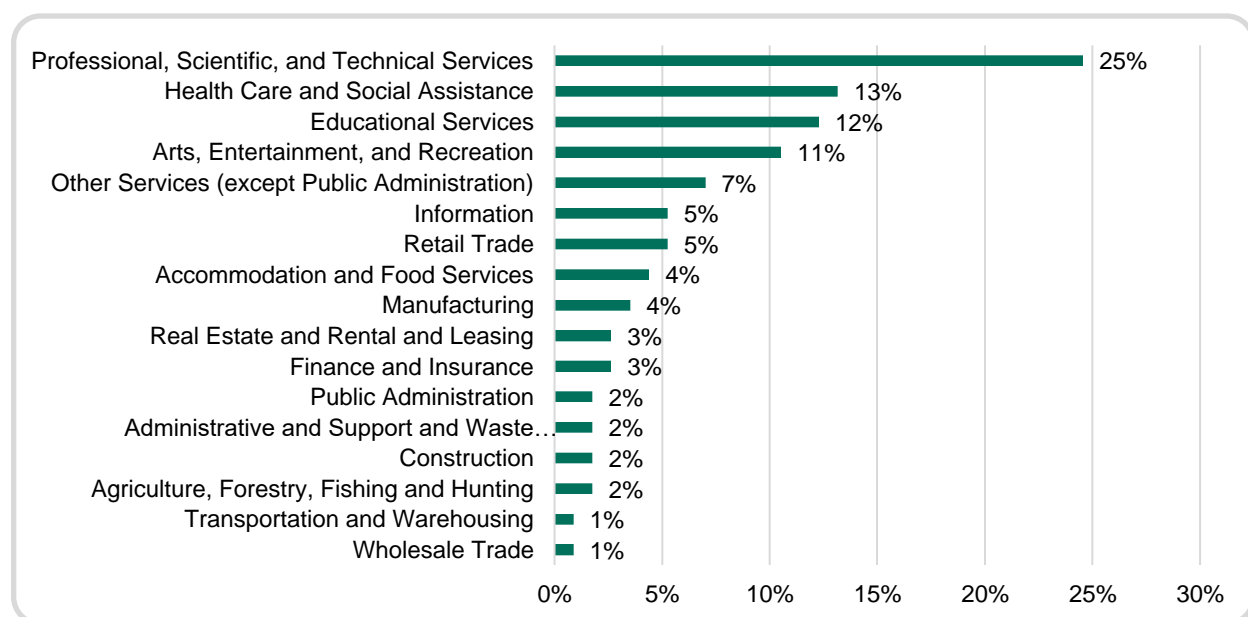


Source: Hawai'i Workforce Pipeline

HIDOE STUDENT INTERNSHIPS IN WINDWARD O‘AHU BY INDUSTRY

Of all the Windward employers providing WBL through Hawai‘i Workforce Pipeline, 29% offer internship opportunities to Windward HIDOE high school students. As shown in Figure 23, 25% of the companies offering internships are in the Professional, Scientific, and Technical Services Industry, followed by Health Care and Social Assistance (13%), Educational Services (12%), and Arts, Entertainment, and Recreation (11%).

Figure 23: Windward WBL Partners Offering Internships by Industry



Source: Hawai‘i Workforce Pipeline

Windward HIDOE high school students benefit from internships in a variety of ways. Hawai‘i Workforce Pipeline’s post-internship survey from SY 2023-24 showed that 91% of students learned about the type of education or experience needed to pursue a career in the field of their internship, setting them on a clearer pathway.

Interns surveyed also shared the most valuable lessons learned through their internships. Common responses were time management skills, communication skills, interacting with patients or customers, and working in a team – professional or “soft” skills that often need to be learned in a workplace environment. Aspects that students enjoyed most about their internship experience included working with other staff or team members, having a professional mentor, experiential learning, and gaining a better understanding of industry standards and business operations.

KEY TAKEAWAYS

INDUSTRY ENGAGEMENT

- Work-Based Learning (WBL) is key for students to explore different career paths that will allow them to live and work in their home communities.
- Accommodation and food services and retail trade are notably underrepresented among employers offering WBL, particularly given that these are some of the top industries of employment in the region.
- Internships are a great way for the younger generation to cultivate their professional skills, like communication and time management, that are often harder to develop in a classroom setting.

RECOMMENDATIONS

1. **Create Career Awareness** – Ensuring students and job seekers are aware of the job opportunities in the region and the associated pay, benefits, and advancement opportunities is crucial to recruiting and retaining talent. This can be done through school events and WBL activities or through community engagement and other more traditional marketing and promotions strategies.
2. **Increase Workforce Development Efforts in Rural Communities** – Increasing workforce development activity and opportunities in the more remote communities in the north and south of the region will help support economic mobility in those areas, many of which report higher unemployment rates and lower than average income levels.
3. **Provide Living-Wage Salaries & Benefits for Entry-Level Workers** – Enhanced focus on increasing salaries for positions with high turnover rates and low pay, particularly in the retail, agriculture, and recreation spaces, is key to recruitment and retention. Alternatively, additional benefits will need to be provided within these sectors to retain employees struggling with the high cost of living. Options should be considered for the development of workforce housing in these sectors, particularly in the Windward region, where rent is higher than average for all unit types.
4. **Address Barriers to Training and Employment** – Providing tuition assistance and other wraparound services for job seekers is needed to ensure equitable access to opportunities. In addition to basic financial assistance, sustainable funding for other supports like childcare and transportation is needed.
5. **Provide Upskilling and Career Advancement Opportunities** – Providing opportunities for career development for those in entry-level positions will benefit employees and support recruitment and retention efforts for organizations. Earn-and-learn programs can allow job seekers to train for more advanced roles while working, enabling career advancement for those who cannot afford to take time off from work to pursue additional training.
6. **Increase Input from Local Job Seekers** – Seeking regular and comprehensive input from job seekers in various career stages will provide more insight into the challenges and opportunities experienced. This insight will allow for more tailored program development.

- 7. Develop Accessible Industry Engagement Opportunities** – Establishing Work-Based-Learning opportunities for employers that are structured with clear requirements and expectations, such as internship models supported by a third party that employers can easily plug into with minimal effort, reduces the burden for employers.
- 8. Create Alignment and Collaboration between Education and Industry** – Addressing local gaps in training for high-need employment areas ensures a pipeline of incoming skilled workers for various roles. Employers should communicate these needs directly to secondary and post-secondary training providers by developing relationships and participating in industry advisory board and sector partnerships. Additionally, employers should ensure their job postings are accurate and comprehensive. Job postings provide important information on skills, education, etc. to job seekers and researchers alike.
- 9. Employer Sharing of Best Practices** – Developing additional opportunities for employers across sectors to share strategies in the workforce development space will help expand the use of best practices.

METHODOLOGY

The Windward O‘ahu Workforce Analysis was funded by the Harold K.L. Castle Foundation. AE Consulting was contracted to manage data collection, analysis, and reporting. Hawai‘i Workforce Pipeline provided invaluable support with conducting stakeholder outreach.

Census Data Analysis

U.S. Census data was sourced and analyzed for the following Windward O‘ahu ZIP codes: Hau‘ula (96717), Ka‘a‘awa (96730), Kahuku (96731), Kailua (96734), Kāne‘ohe (96744), Lā‘ie (96762), Waimānalo (96765) and the Kāne‘ohe Marine Corps Base Hawai‘i or MCBH (96863). Honolulu County U.S. Census data was also sourced for comparison.

Job Postings Analysis

The snapshot analysis of job postings available in Windward O‘ahu ($n = 828$) was conducted in July 2024 using HireNet Hawaii’s jobs search tool. For each of the Windward O‘ahu ZIP codes, the de-duplicated number of job postings was recorded. The occupation filter was used to identify and record the number of job postings in each occupational category by zip code. In each ZIP code, for the 5 occupational categories with the most postings, the highest-paying postings were sampled ($n = 88$), and data on required education was captured for additional analysis.

Stakeholder Outreach

AE Consulting and Hawai‘i Workforce pipeline conducted one-on-one interviews with representatives from 7 Windward O‘ahu employers and business leaders. The interviews focused on employers’ top workforce needs, including in-demand job roles and hard to fill positions, as well as their workforce challenges and strategies.

Additionally, AE Consulting interviewed representatives of post-secondary institutions and workforce training providers in the region to gain insight into the education and training opportunities available.

Employer Survey

Hawai‘i Workforce Pipeline conducted a survey of Windward O‘ahu businesses ($n = 23$) to gather data on their employees, in-demand job openings, and workforce challenges. The survey was distributed to tenants of Alexander & Baldwin, Hawai‘i Reserve, and Kamehameha Schools Hi‘ialo Group.

PRIMARY DATA SOURCES

U.S. Census Bureau

U.S. Census Bureau data from the [American Community Survey](#) (5-Year Estimates, 2018-2022) were used to identify Windward O‘ahu population demographics and residents’ sectors of employment. LEHD Origin-Destination Employment Statistics (LODES) via the [OnTheMap](#) application was used to identify the top sectors of employment for workers in Windward O‘ahu. Data was gathered for the following [Zip Code Tabulation Areas](#): Hau‘ula (96717), Ka‘a‘awa (96730), Kahuku (96731), Kailua (96734), Kāne‘ohe (96744), Lā‘ie (96762), Waimānalo (96765) and Kāneohe Marine Corps Base Hawai‘i or MCBH (96863).

HireNet Hawaii

[HireNet Hawaii](#) was used to identify major employers in each of the Windward O‘ahu ZIP Codes based on estimated number of employees and to conduct a snapshot analysis of job postings in Windward O‘ahu.