

Visitors to the North Shore

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Research and Economic Analysis Division
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RESEARCH & ECONOMIC ANALYSIS DIVISION

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Table of Contents

| | |
|---|----|
| Executive Summary..... | 2 |
| Introduction..... | 4 |
| North Shore Visitor Demographic Characteristics..... | 7 |
| Purpose, Motivation, and Types of Accommodations for Most Recent Trip | 9 |
| North Shore Visitor Activity Participation | 12 |
| North Shore Visitor Units | 19 |
| North Shore Resident Sentiment Regarding Tourism | 21 |
| Conclusion | 25 |
| Appendix. O’ahu Visitor Satisfaction Survey Map..... | 27 |

Executive Summary

Based on data from 2018 – 2021 Visitor Satisfaction Surveys, DBEDT estimates that over half of all visitors who came by air service to O‘ahu visited the North Shore in 2023 and that three-quarters of the visitors to the North Shore came from the U.S. An average of 12,088 visitors were in the North Shore area on a typical day in 2023.

North Shore visitor spending is estimated under the following assumptions. If North Shore visitors were primarily motivated to visit Hawai‘i due to their desire to stay in the North Shore or extended their visit to participate in North Shore activities (day trip), approximately \$1.1 billion of visitor spending in 2023 may be attributed to the North Shore. This represents about 12 percent of O‘ahu air visitor expenditures and about 5 percent of total air visitor expenditures for the state. When direct, indirect and induced impacts are considered, this \$1.1 billion in visitor spending is estimated to have contributed \$1.9 billion in output, \$532.1 million in earnings, and 9,834 in total jobs to O‘ahu in 2023; or \$2.0 billion in output, \$553.5 million in earnings, and 10,335 in total jobs statewide.

Based on demographic visitor data for 2019, the last year prior to the COVID-19 pandemic, North Shore visitors were slightly younger and more likely to be female than visitors who did not visit the North Shore. The median age of North Shore visitors was 45 years compared to a median age of 47 years for those who did not visit the North Shore.

North Shore visitors were more likely to have come to O‘ahu on vacation or to visit friends and relatives and less likely to have come for business-related purposes compared to non-North Shore visitors. Approximately 20.4 percent of North Shore visitors reported being motivated to visit O‘ahu by television programs or movies filmed in Hawai‘i, followed by Hawaiian cultural events (16.6%), social media posts and videos (16.2%), outdoor or sporting activities and events (16.1%), and Hawaiian music (8.8%).

Visitors who visited the North Shore reported participating in a wide range of activities during their trip to O‘ahu. Almost all North Shore visitors indicated that they participated in sightseeing (97.1%), recreation (97.5%), entertainment and dining (99.3%), and shopping (98.0%). Seventy-seven percent of North Shore visitors participated in activities related to history, culture, and the arts compared to 56.0 percent of visitors who did not go to the North Shore.

The most popular O‘ahu activities amongst North Shore visitors were going to the beach or sunbathing (85.3% participation), going on a self-guided tour or driving around the island (78.4% participation), and swimming in the ocean (64.7% participation). Over half of visitors who went to the North Shore also reported using a rental car (64.7%), going to a mall or department store (63.5%), going to a supermarket (58.9%), going to a convenience store (56.5%), visiting scenic views/natural landmarks (55.1%), and going to a family restaurant (55.1%).

Among attractions in or near the North Shore area, those popular with North Shore visitors included North Shore Beaches (71.7% participation), Dole Plantation (45.1% participation), Hale‘iwa (40.1% participation), the Polynesian Cultural Center (26.0% participation) and Waimea Valley (23.2% participation).

In 2023, DBEDT’s Visitor Plant Inventory showed that the North Shore had 786 hotel rooms and 424 vacation rental units, representing 2.9 percent of all hotel rooms and 9.5 percent of all vacation rental units on O’ahu.

North Shore resident sentiments regarding tourism have been mixed. The percentage of North Shore residents that believe that tourism has been worth the issues associated with it decreased from 81 percent in Spring 2021 to 38 percent in Spring 2023 before jumping up to 72 percent in Spring 2024. North Shore residents have consistently expressed that the “island is being run for tourists at the expense of local people”, with only half of North Shore residents in Spring 2024 responding that the impact of tourism on them and their family has been positive. At the same time, North Shore residents recognize that tourism creates shopping, dining, and entertainment opportunities for residents, creates job opportunities with paths for advancement, and supports local businesses like retail, dining, etc. In Spring 2024, 47 percent of North Shore respondents indicated that they felt that more effort was being made to balance the economic benefits of tourism with quality of life for residents, with 50 percent indicating that tourism was being better managed.

Introduction

Visitors to the North Shore are defined in this report as those who indicated that they visited the North Shore area in response to the Visitor Satisfaction Survey question “In which of the following areas did you stay or visit during your trip on O’ahu?” and/or participated in activities located in the North Shore.¹ Respondents who did not select the North Shore area and did not participate North Shore activities are counted as visitors who did not visit the North Shore.

Under this definition, DBEDT estimates that 2.9 million visitors, or more than half (52.5%) of the 5.6 million visitors who travelled by air service to O’ahu visited the North Shore area in 2023. Among the major visitor markets, the estimated percentage of visitors to O’ahu who went to the North Shore ranges from 36.4 percent of visitors from Japan to 58.3 percent of visitors from the U.S. West.

Table 1. Percentage of Visitors by Visitor Market who went to the North Shore, 2023

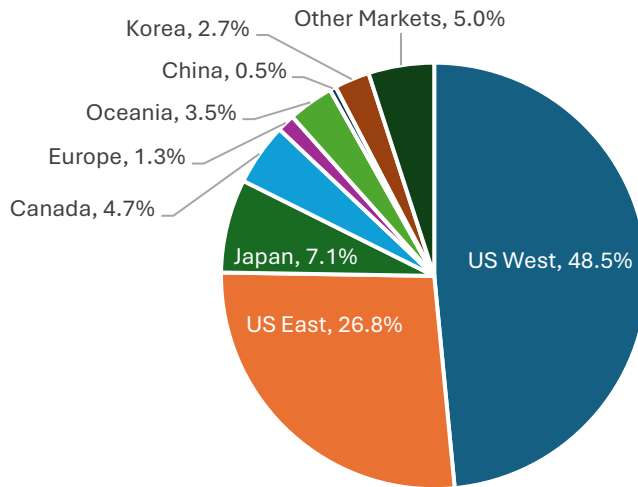
| Visitor Market | % of Air Visitors who went to the North Shore | Air Visitors to O’ahu | Air Visitors to the North Shore |
|----------------------------|---|-----------------------|---------------------------------|
| (1) | (2) | (3) | (2) x (3) |
| US West | 58.3% | 2,447,883 | 1,428,165 |
| US East | 53.5% | 1,474,790 | 789,290 |
| Japan | 36.4% | 573,719 | 209,074 |
| Canada | 56.9% | 244,328 | 138,939 |
| Europe | 42.8% | 92,772 | 39,674 |
| Oceania | 43.8% | 232,500 | 101,875 |
| China | 44.5% | 31,728 | 14,132 |
| Korea | 49.2% | 159,755 | 78,558 |
| Other Markets | 41.3% | 355,934 | 146,897 |
| US Total | 56.5% | 3,922,673 | 2,217,456 |
| International Total | 43.1% | 1,690,736 | 729,150 |
| Total Air Visitors | 52.5% | 5,613,409 | 2,946,605 |

Sources and notes: The percentages of air visitors who visited the North Shore are based on the weighted average percentage of visitors from each market who indicated that they visited the North Shore area and/or participated in North Shore activities between 2018 and 2021. See 2018 – 2021 Visitor Satisfaction & Activity Reports, prepared by Anthology Research for the HTA and DBEDT. It is assumed that the percentage of air visitors from markets other than the US, Japan, Canada, Europe, Oceania, China, and Korea (including but not limited to those from Hong Kong, Singapore, Taiwan, Latin America, Guam, Philippines, American Samoa, French Polynesia, etc.) that visited the North Shore is comparable to the share of international visitors from Japan, Canada, Europe, Oceania, China, and Korea who visited the North Shore. Data on air visitor arrivals to O’ahu by visitor market is from the Tourism Data Warehouse, as provided by DBEDT and HTA.

¹ Detailed visitor satisfaction data is collected through the annual Hawai’i Tourism Authority (HTA)/DBEDT Visitor Satisfaction Survey. In years 2018 through 2021, respondents were asked to identify the areas that they visited based on a map of O’ahu (see Appendix 1). Activities located in the North Shore included Hale’iwa, North Shore beaches, Polynesian Cultural Center, and Waimea Valley.

Figure 1. Percentage of North Shore Visitors by Visitor Market, 2023

Total Air Visitors to the North Shore: 2,946,605



Source: 2018 – 2021 Visitor Satisfaction & Activity Reports, prepared by Anthology Research for HTA and DBEDT, and DBEDT Tourism Data Warehouse. Calculations by DBEDT.

To calculate the number of visitors in the North Shore on a typical day, assumptions were made regarding their length of stay in the North Shore area. Based on the responses to a 2005 survey of North Shore visitors conducted by OmniTrak Group, we assume that 92 percent of North Shore visitors are “day trippers” (i.e., do not stay overnight or more than one day) while the remaining eight percent stay in the North Shore for the length of their trip.² Assuming that visitors who stay in the North Shore for the duration of their trip stay an average of 7.2 days (consistent with the average length of stay for O’ahu visitors in 2023), 4.4 million visitor days were spent in the North Shore in 2023. The number of visitors to the North Shore on a typical day in 2023 was 12,088 visitors (4,412,130 visitor days/365 days).

Table 2. North Shore Visitor Days, 2023

| Type of Trip to the North Shore | Percentage of North Shore Visitors | Visitors by Type of Trip | Avg. Length of Stay (days) | Total Days Spent in North Shore |
|--------------------------------------|------------------------------------|--------------------------|----------------------------|---------------------------------|
| Day trip | 92% | 2,710,877 | 1 | 2,710,877 |
| Entire trip spent in the North Shore | 8% | 235,728 | 7.2 | 1,701,253 |
| Total | 100% | 2,946,605 | 1.5 | 4,412,130 |

Sources: North Shore Visitors, A Visitor Satisfaction Tack-On Survey, prepared for HTA by OmniTrak Group Inc., November 2005, and DBEDT Tourism Data Warehouse. Calculations by DBEDT.

If visitors who spent their entire trip in the North Shore area were primarily motivated to visit Hawai‘i due to a desire to stay in the North Shore area, and visitors who went on a day trip to the North Shore were motivated to stay that additional day due to a desire to visit the North Shore, the expenditures generated during these days may be attributed to the North Shore. Under these

² North Shore Visitors, A Visitor Satisfaction Tack-On Survey, prepared for HTA by OmniTrak Group Inc., November 2005.

assumptions, and assuming that 92 percent of visitors from each market are day trippers while eight percent stay in the North Shore for the length of their trip, we estimate that approximately \$1.1 billion in visitor expenditures may be attributed to the North Shore. This represents 12.1 percent of total air visitor spending in O‘ahu in 2023 and 5.2 percent of total air visitor expenditures in the state.³

Table 3. North Shore Visitor Spending, 2023

| Visitor Market | Estimated North Shore Visitor days | Per Person Per Day Spending | Total Air Visitor Expenditures (\$ million) |
|----------------|------------------------------------|-----------------------------|---|
| | | | (2) x (3) |
| (1) | (2) | (3) | (4) |
| US West | 2,138,478 | 225.37 | 481.95 |
| US East | 1,181,852 | 262.56 | 310.31 |
| Japan | 313,060 | 240.72 | 75.36 |
| Canada | 208,042 | 220.27 | 45.83 |
| Europe | 59,407 | 243.22 | 14.45 |
| Oceania | 152,544 | 295.64 | 45.10 |
| China | 21,161 | 352.96 | 7.47 |
| Korea | 117,629 | 315.83 | 37.15 |
| Other Markets | 219,957 | 247.86 | 54.52 |
| Total | 4,412,130 | 243.00 | 1,072.13 |

Sources: North Shore Visitors, A Visitor Satisfaction Tack-On Survey, prepared for HTA by OmniTrak Group Inc., November 2005, and DBEDT Tourism Data Warehouse. Calculations by DBEDT.

As shown below, the economic impacts of \$1.1 billion in North Shore visitor spending occur largely on O‘ahu. When direct, indirect and induced impacts are considered,⁴ North Shore visitor spending contributes \$1.9 billion in output, \$532.1 million in earnings, and 9,834 in total jobs on O‘ahu. Statewide, estimated North Shore visitor spending in 2023 contributes \$2.0 billion in output, \$553.5 million in earnings, and 10,335 in total jobs.

If, however, North Shore visitors would still have come to Hawai‘i if they were unable to stay in the North Shore, or would have otherwise substituted other O‘ahu activities for North Shore activities during the day spent in the North Shore, these visitor spending and economic impact estimates should not be fully attributed to the North Shore.

³ Total air visitor expenditures on O‘ahu in 2023 were \$8.9 billion. Total air visitor expenditures for the state were \$20.7 billion. DBEDT Tourism Data Warehouse.

⁴ Direct impacts measure the impacts of visitor spending on the businesses that directly serve visitors such as hotels, restaurants, retail stores, tour buses, and rental car companies. Indirect impacts include the sales of businesses that do not directly sell to visitors but support the businesses that do work directly with visitors (e.g., commercial laundry services, utilities, etc.). Induced impacts include the economic activities (spending) of the employees of businesses that work directly and indirectly with visitors.

Table 4. Economic Impacts of North Shore Visitor Spending, 2023

| Area | Output (\$ million) | Earnings | Total Jobs |
|-----------|---------------------|----------|------------|
| Oahu | \$1,863.8 | 532.1 | 9,834 |
| Statewide | \$1,965.4 | 553.5 | 10,335 |

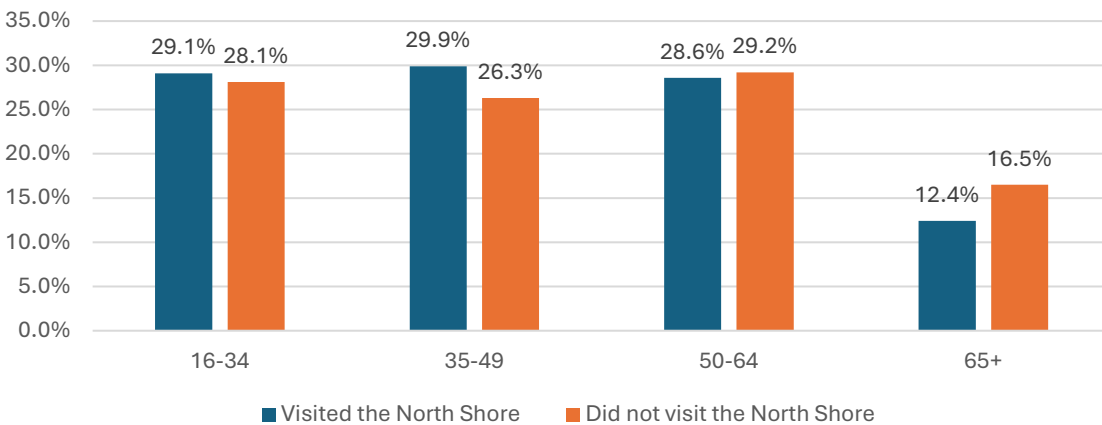
Sources: Based on Type II final demand multipliers in DBEDT’s 2017 Hawaii Inter-County Input-Output Study. Calculations by DBEDT.

North Shore Visitor Demographic Characteristics

To examine the extent to which visitors to the North Shore differ from visitors who did not visit the North Shore, DBEDT requested a special tabulation of the 2019 Visitor Satisfaction and Activity Survey data. The 2019 survey was used to examine the demographic characteristics of North Shore visitors because COVID-19 related travel restrictions impacted the number of visitors available to sample in 2020 and 2021. The question regarding areas visited while on O’ahu was not included in the 2022 or 2023 Visitor Satisfaction Surveys.

Based on the 2019 survey data, visitors to the North Shore appeared similar in several respects to O’ahu visitors who did not visit the North Shore. North Shore visitors tended to be slightly younger and were more likely to be under 50 years old compared to those who did not visit the North Shore. The median age of visitors who visited the North Shore was 45 years, compared to the median age of 47 years for those did not visit the North Shore.

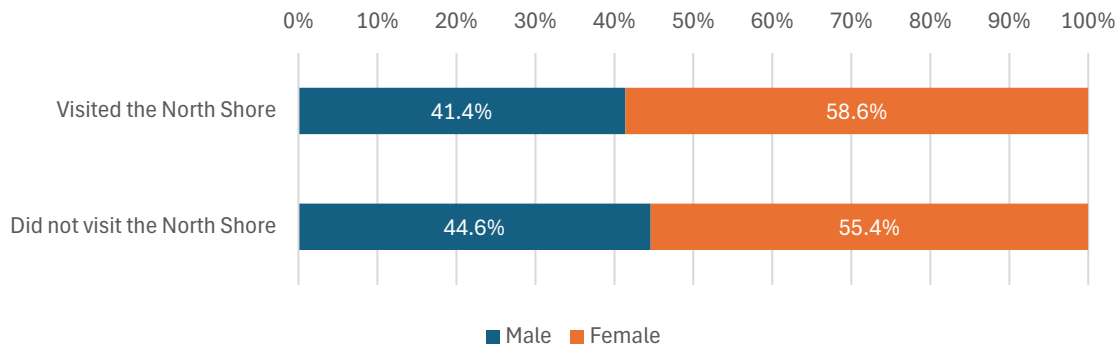
Figure 2. Percentage Distribution by Age: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

Over half of North Shore visitors (58.6%) and over half of those who did not visit the North Shore (55.4%) were females compared to males. There was a higher percentage of female visitors among those who went to the North Shore visitors compared to those who did not go to the North Shore.

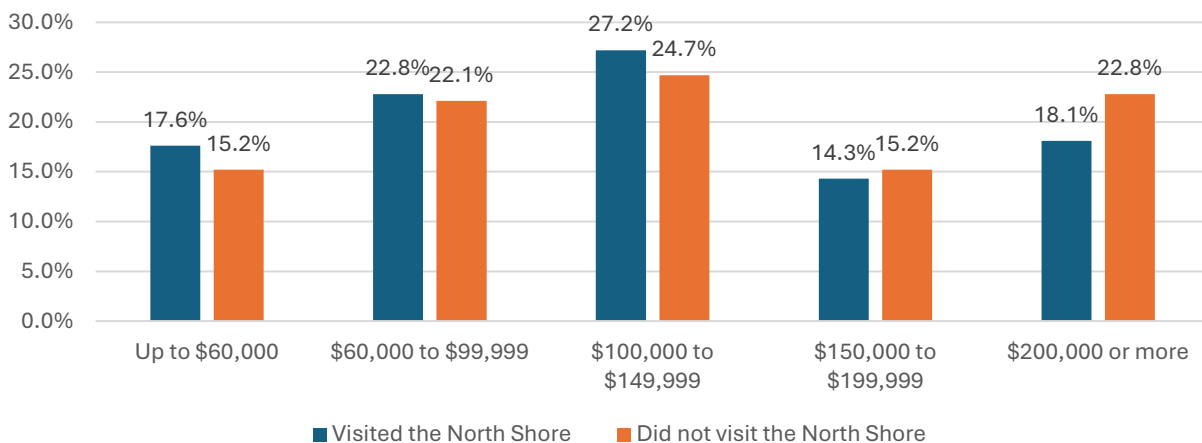
Figure 3. Percentage Distribution by Gender: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

North Shore visitors and O’ahu visitors who did not visit the North Shore had similar income distributions, however, North Shore visitors were more likely to have earned less than \$150,000 per household in 2018 compared to those who did not visit the North Shore. Visitors who did not visit the North Shore were more likely to have earned \$150,000 or more per household compared to North Shore visitors.

Figure 4. Percentage Distribution of Household Income: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2018*



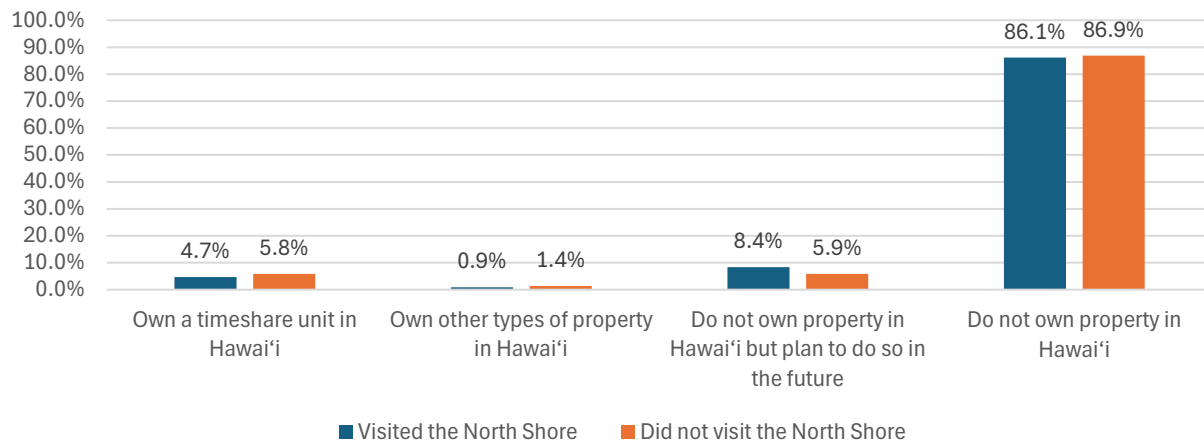
Source: 2019 Visitor Satisfaction and Activity Survey data.

* Although this data was collected in 2019, the data reflects the total annual income received from all sources before taxes in 2018.

Approximately 86.1 percent of visitors to the North Shore did not own property in Hawai’i, slightly lower than visitors who did not visit the North Shore (86.9%). North Shore visitors were more likely to indicate that they did not own property in Hawai’i but planned to do so in the future (8.4% for North Shore visitors compared to 5.9% for visitors who did not visit the North Shore). Approximately 4.7 percent of North Shore visitors owned a time share unit in Hawai’i and less than one percent owned any other types of property in Hawai’i. This compared to 5.8 percent of O’ahu visitors who

did not visit the North Shore and owned a time share unit in Hawai'i and 1.4 percent who owned other types of property.

Figure 5. Percentage Distribution by Hawai'i Property Ownership: North Shore visitors and O'ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

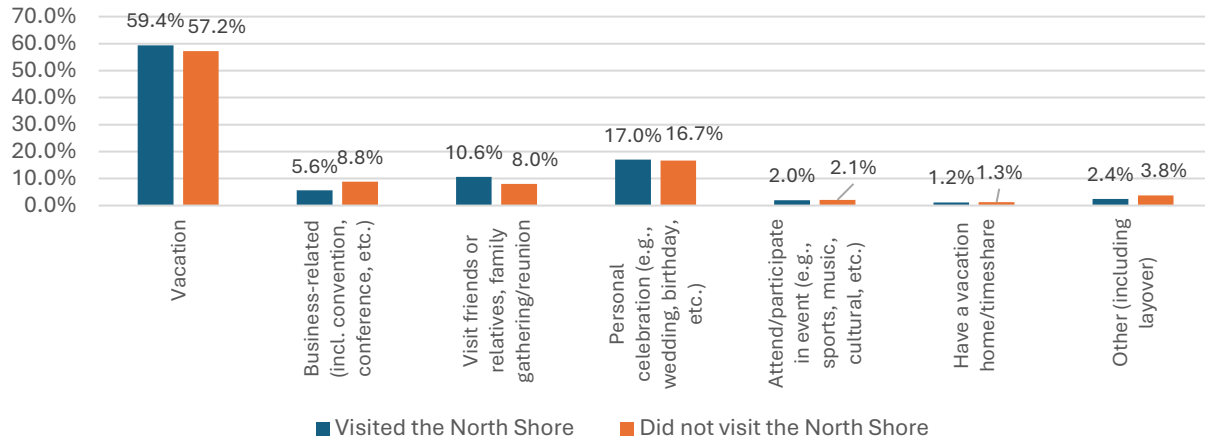
Purpose, Motivation, and Types of Accommodations for Most Recent Trip

Based on the 2019 VSAT data, visitors to the North Shore were slightly more likely to indicate that the primary purpose of their most recent trip to O'ahu was a vacation (59.4% compared to 57.2% for visitors who did not go to the North Shore). Visitors to the North Shore were less likely to have come to O'ahu for business-related purposes⁵ (5.6% for North Shore visitors compared to 8.8% for visitors who did not visit the North Shore) and more likely to have come to O'ahu to visit friends or relatives, including for family gatherings or reunions (10.6% of North Shore visitors compared to 8.0% of visitors who did not visit the North Shore). Similar shares of North Shore visitors and visitors who did not visit the North Shore came to O'ahu for personal celebrations such as weddings, anniversaries, birthdays, etc.⁶ (17.0% of North Shore visitors and 16.7% of visitors who did not go to the North Shore). Similar shares of North Shore visitors and visitors who did not visit the North Shore also came to O'ahu to attend or participate in a sporting, cultural, musical, or culinary event (2.0% of North Shore visitors and 2.1% of visitors who did not go to the North Shore).

⁵ Business-related purposes include to attend a business meeting or conduct business; to attend a convention, conference, or seminar; and as an incentive or reward.

⁶ Personal celebrations include to get married or have a vow renewal, to attend or participate in a wedding or vow renewal, for a honeymoon, and for an anniversary or birthday.

Figure 6. Primary Purpose of Trip: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019

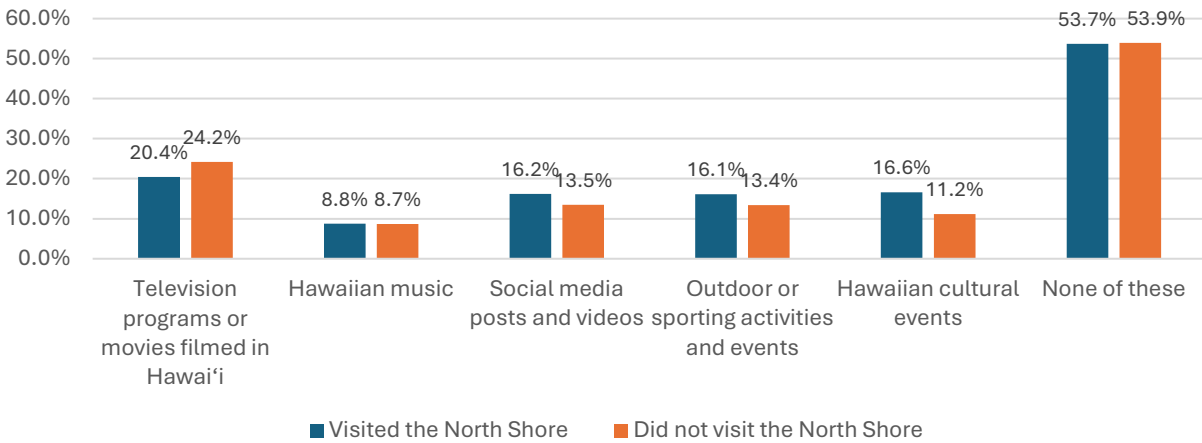


Source: 2019 Visitor Satisfaction and Activity Survey data. Less than one percent of North Shore visitors and less than one percent of O’ahu visitors who did not visit the North Shore indicated that the primary purpose of their trip was for: medical treatment, shopping/fashion, education/visit schools, real estate purchase or viewing. These categories are not shown.

Regarding the motivation for their trip to O’ahu, over 20 percent of North Shore visitors and visitors who did not visit the North Shore indicated that they were motivated to visit due to television programs or movies filmed in Hawai’i (20.4% of North Shore visitors and 24.2% of visitors who did visit the North Shore).⁷ North Shore visitors were more likely to indicate that they were motivated to visit due to Hawaiian cultural events (16.6% of North Shore visitors compared to 11.2% of visitors who did not visit the North Shore), outdoor or sporting activities and events (16.1% of North Shore visitors compared to 13.4% of visitors who did not visit the North Shore), and social media posts and videos (16.2% of North Shore visitors compared to 13.5% of visitors who did visit the North Shore). Almost nine percent of North Shore visitors and visitors who did not go to the North Shore were motivated to visit O’ahu due to Hawaiian music (8.8% of North Shore visitors and 8.7% of visitors who did visit the North Shore).

⁷ Respondents may select more than one motivating factor in response to this question.

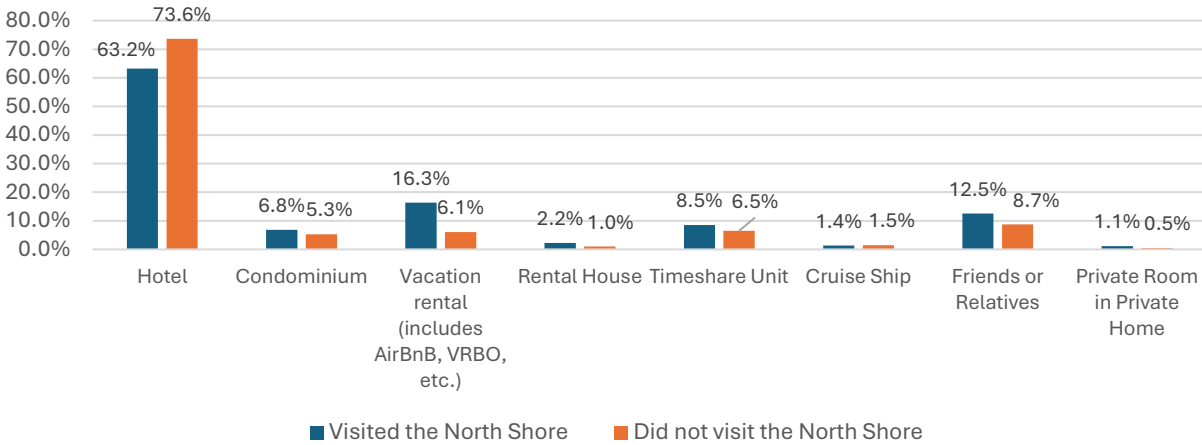
Figure 7. Motivation to visit O‘ahu: North Shore visitors and O‘ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data. Respondents may select more than one motivating factor in response to this question.

Most visitors who went to the North Shore spent at least part of their trip in a hotel during their visit to O‘ahu (63.2%). However, higher percentages of North Shore visitors stayed in other types of accommodations when compared to visitors who did not go to the North Shore, including vacation rentals (16.3% of North Shore visitors compared to 6.1% of visitors who did not go to the North Shore), with friends or relatives (12.5% of visitors to the North Shore compared to 8.7% of visitors who did not go to the North Shore), in timeshare units (8.5% of North Shore visitors compared to 6.5% of visitors who did not go to the North Shore), in condominiums (6.8% of North Shore visitors compared to 5.3% of visitors who did not go to the North Shore), and in rental houses (2.2% of North Shore visitors compared to 1.0% of visitors who did not go to the North Shore).

Figure 8. Type of O‘ahu Accommodation: North Shore visitors and O‘ahu visitors who did not visit the North Shore, 2019

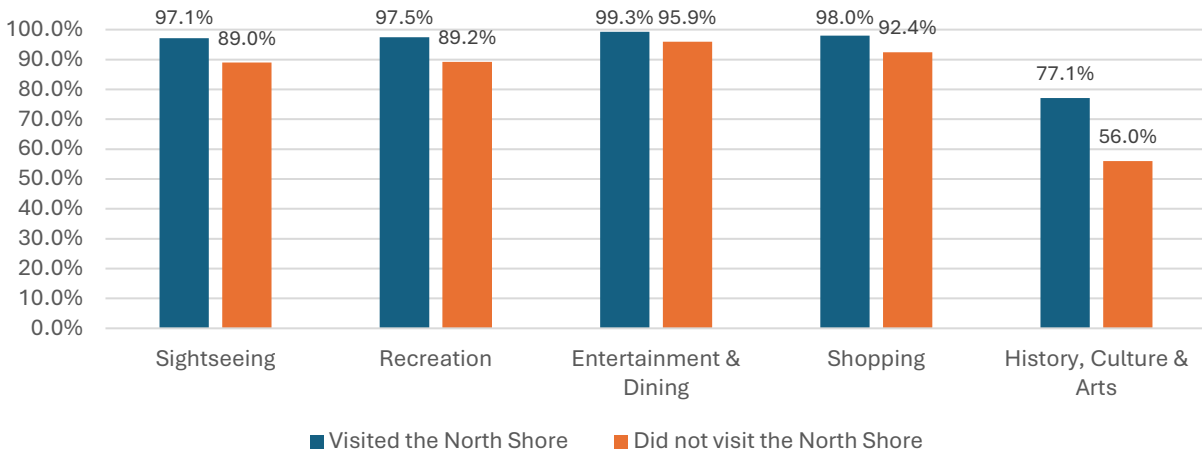


Source: 2019 Visitor Satisfaction and Activity Survey data. Respondents may have stayed at more than one type of accommodation. One percent or less of North Shore visitors and one percent or less of O‘ahu visitors who did not visit the North Shore indicated that they stayed in each of the following types of accommodations: bed & breakfast, hostel, camp site/beach, shared room/space in private home, other. These categories are not shown.

North Shore Visitor Activity Participation

When asked about the activities in which they participated on their most recent trip to O‘ahu, visitors to the North Shore had higher participation rates across a range of activities compared to visitors who did not visit the North Shore. Over 95 percent of North Shore visitors indicated that they participated in sightseeing, recreation, entertainment and dining, and shopping activities. Seventy-seven percent of North Shore visitors participated in activities related to history, culture, and the arts compared to 56.0 percent of visitors who did not go to the North Shore.

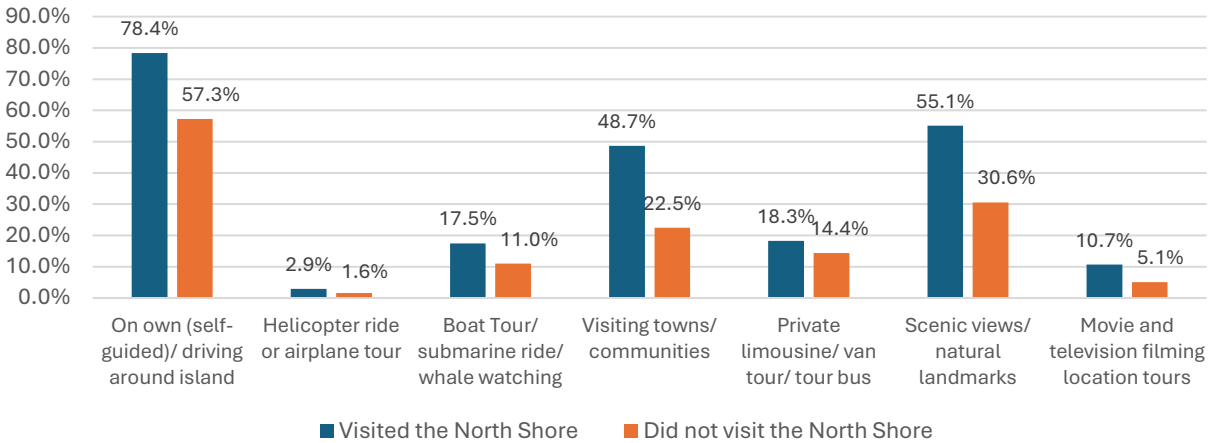
Figure 9. Percentage of Visitors who Participated in O’ahu Activities: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

Within the O’ahu sightseeing activities, North Shore visitors were more likely to participate in all categories identified. North Shore visitors were more likely to sight-see on their own (self-guided) or drive around the island (78.4% compared to 57.3% of visitors who did not go to the North Shore), seek out scenic views or other landmarks (55.1% compared to 30.6% of visitors who did not go to the North Shore), visit towns or communities (48.7% compared to 22.5% of visitors who did not go to the North Shore), participate in a boat tour, submarine ride, or whale watching (17.5% compared to 11.0% of visitors who did not go to the North Shore); go on movie and television filming location tours (10.7% compared to 5.1% of visitors who did not go to the North Shore); go in a private limousine, van tour, or tour bus (18.3% compared to 14.4% of visitors who did not go to the North Shore); and go on a helicopter ride or airplane tour (2.9% compared to 1.6% of visitors who did not go to the North Shore).

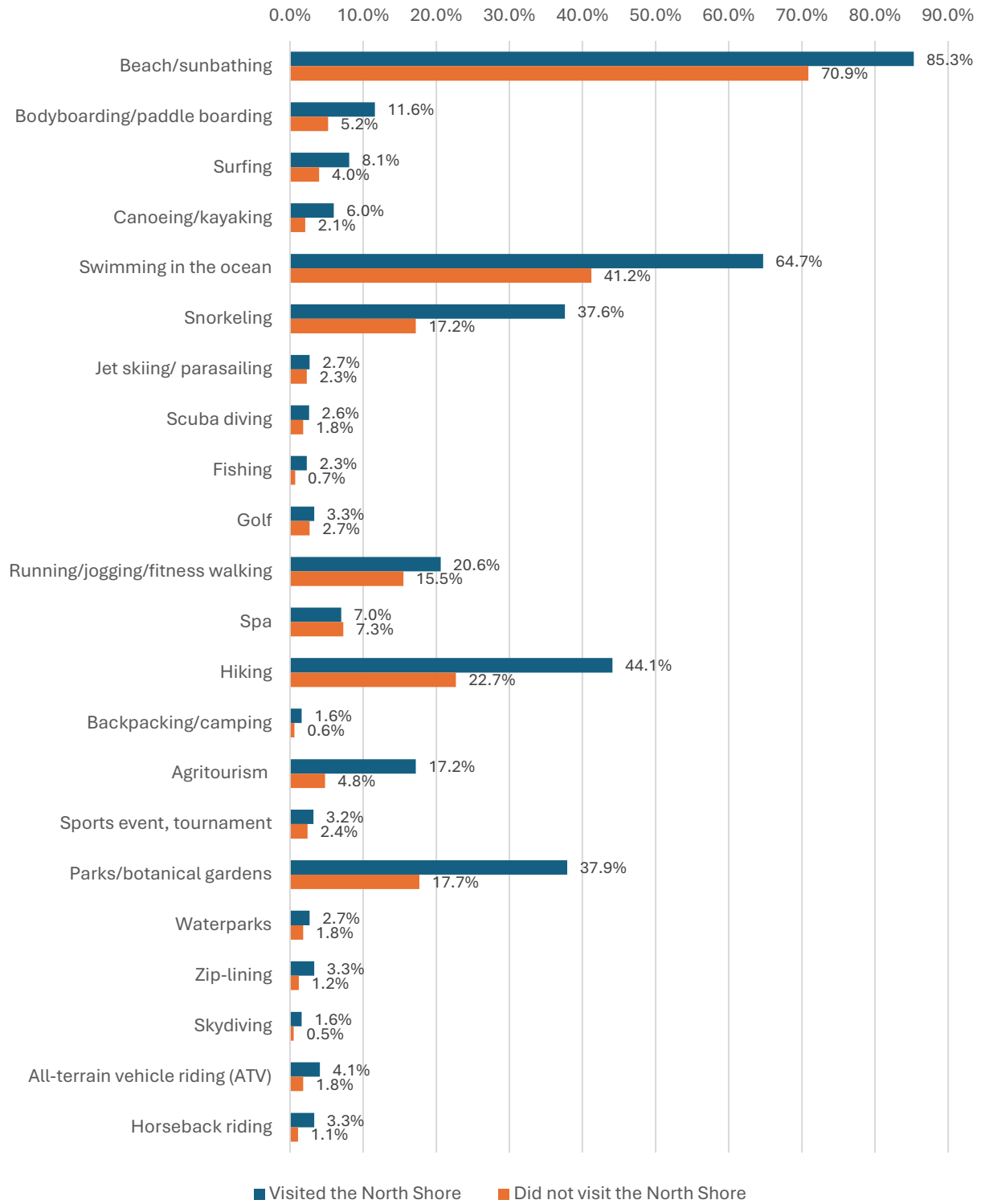
Figure 10. Percentage of Visitors who Participated in O’ahu Sightseeing Activities: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

North Shore visitors were also more likely to participate in a range of recreational activities. Outdoor activities, especially beach and hiking related activities were more popular among North Shore visitors. North Shore visitors were more likely to participate in beach/sunbathing (85.3% compared to 70.9% for visitors who did not go to the North Shore), swimming in the ocean (64.7% compared to 41.2% for visitors who did not go to the North Shore), snorkeling (37.6% compared to 17.2% for visitors who did not go to the North Shore), hiking (44.1% compared to 22.7% for visitors who did not go to the North Shore), and visiting parks and botanical gardens (37.9% compared to 17.7% for visitors who did not go to the North Shore). North Shore visitors were also more likely to participate in agritourism (17.2%) compared to those who did not visit the North Shore (4.8%).

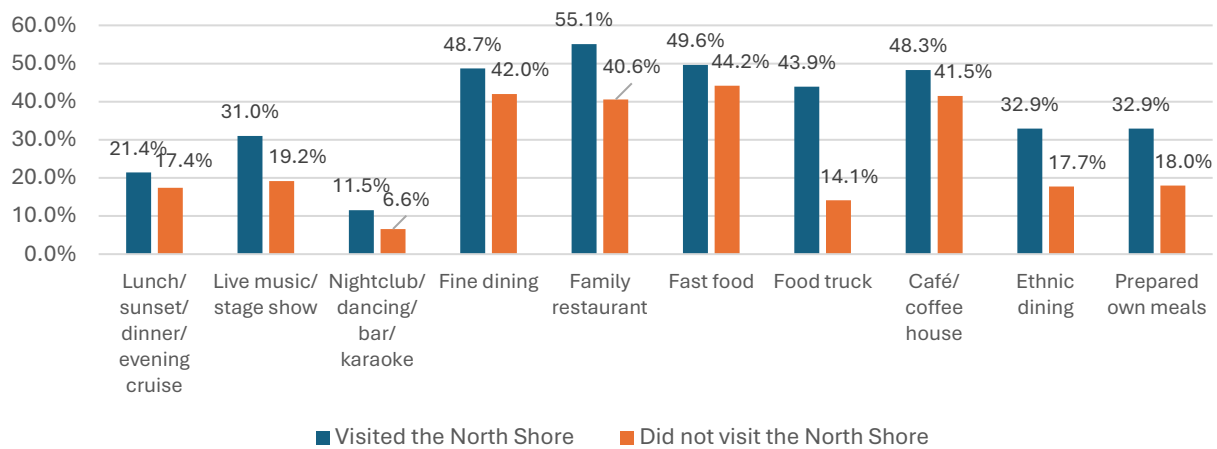
Figure 11. Percentage of Visitors who Participated in O’ahu Recreation Activities: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data. Less than one percent of North Shore visitors and less than one percent of O’ahu visitors who did not visit the North Shore indicated that they participated in each of the following activities: windsurfing/kitesurfing and mountain tubing/waterfall rappel.

Higher percentages of North Shore visitors engaged in all categories of entertainment and dining activities compared to visitors who did not visit the North Shore. The differences were most pronounced for food trucks (43.9% of North Shore visitors compared to 14.1% for visitors who did not visit the North Shore) and for ethnic dining (32.9% of North Shore visitors compared to 17.7% for visitors who did not visit the North Shore). North Shore visitors were also more likely to have prepared their own meals at some point during their trip (32.9% compared to 18.0% of visitors who did not visit the North Shore), to have dined at a family restaurant (55.1% of North Shore visitors compared to 40.6% for visitors who did not visit the North Shore), and to have attended a live music or stage show (31.0% of North Shore visitors compared to 19.2% for visitors who did not visit the North Shore).

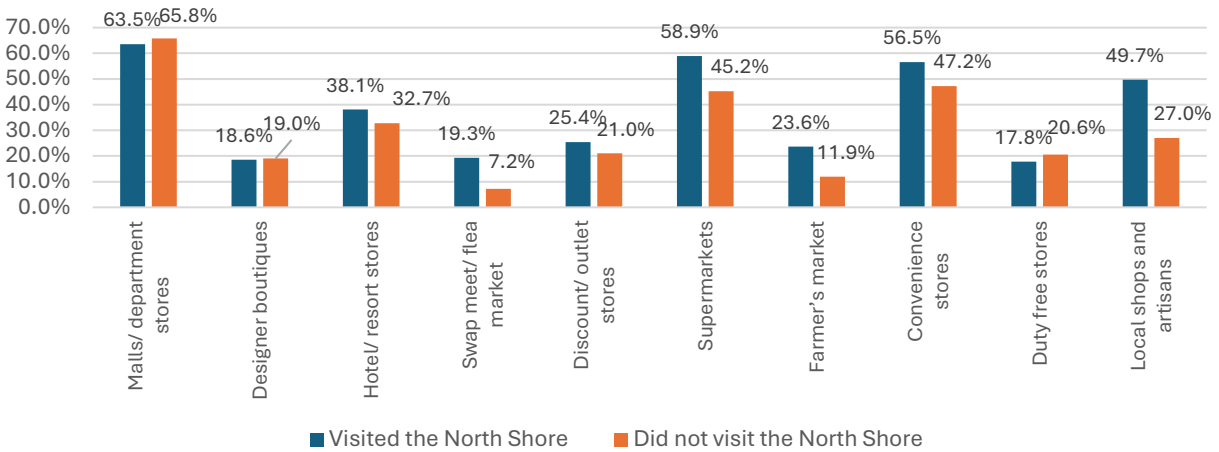
Figure 12. Percentage of Visitors who Participated in O’ahu Entertainment & Dining Activities: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

North Shore visitors were more likely to participate in most shopping activities, especially at local shops and artisans (49.7% of North Shore visitors compared to 27.0% of visitors who did not go to the North Shore). A larger percentage of North Shore visitors also shopped at supermarkets (58.9% compared to 45.2% of visitors who did not go to the North Shore) and farmer’s markets (23.6% compared to 11.9% of visitors who did not go to the North Shore), consistent with a higher percentage of North Shore visitors having prepared their own meals during their trip. North Shore visitors were also more likely to shop at swap meets/flea markets (19.3% compared to 7.2% of visitors who did not go to the North Shore).

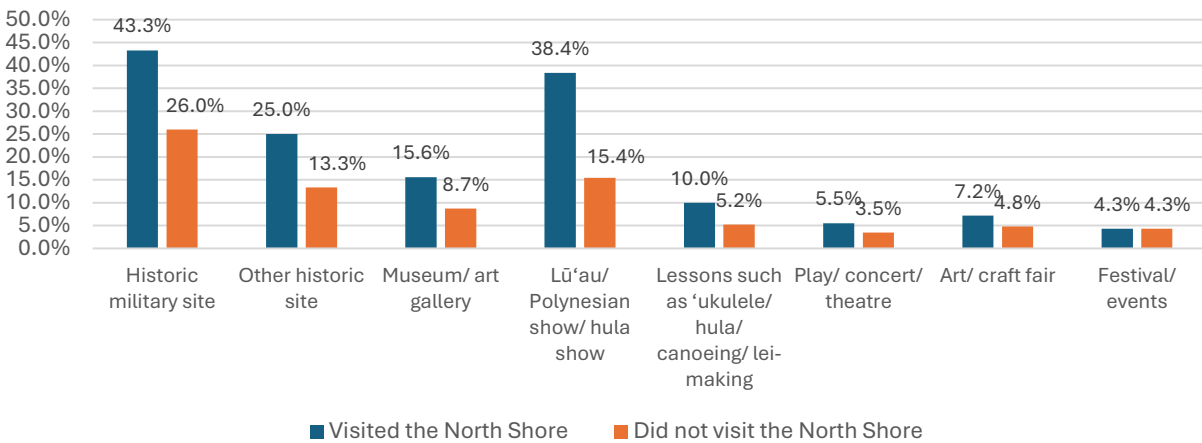
Figure 13. Percentage of Visitors who Participated in O’ahu Shopping Activities: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

North Shore visitors were more likely to indicate that they participated in a variety of historic, cultural, and art related events. A higher percentage of North Shore visitors indicated that they attended a lū’au, Polynesian show, or hula show (38.4% compared to 15.4% of visitors who did not visit the North Shore), which is not surprising given the location of the Polynesian Cultural Center in Lā’ie. North Shore visitors were also more likely to have gone to a historic military site (43.3% compared to 26.0% of visitors who did not visit the North Shore), other historic site (25.0% compared to 13.3% of visitors who did not visit the North Shore), other historic site (25.0% compared to 13.3% of visitors who did not visit the North Shore), and/or to have frequented a museum or art gallery (15.6% compared to 8.7% of visitors who did not visit the North Shore).

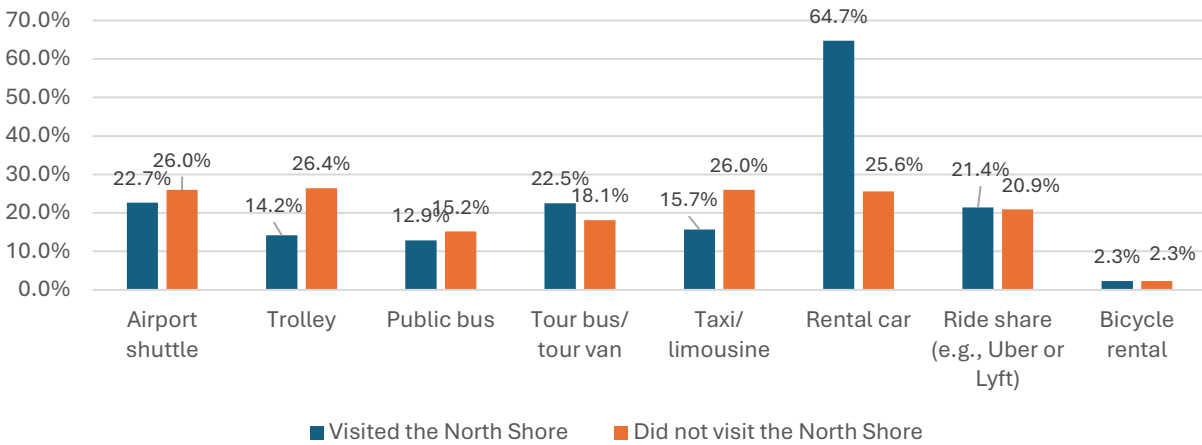
Figure 14. Percentage of Visitors who Participated in O’ahu History, Culture, and Arts Activities: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

Regarding modes of transportation used, 64.7 percent of visitors to the North Shore indicated that they used a rental car, compared to 25.6 percent of visitors who did not go to the North Shore. North Shore visitors were less likely to use a trolley (14.2% of North Shore visitors compared to 26.4% of visitors who did not visit the North Shore) or taxi/limousine (15.7% compared to 26.0% of visitors who did not visit the North Shore).

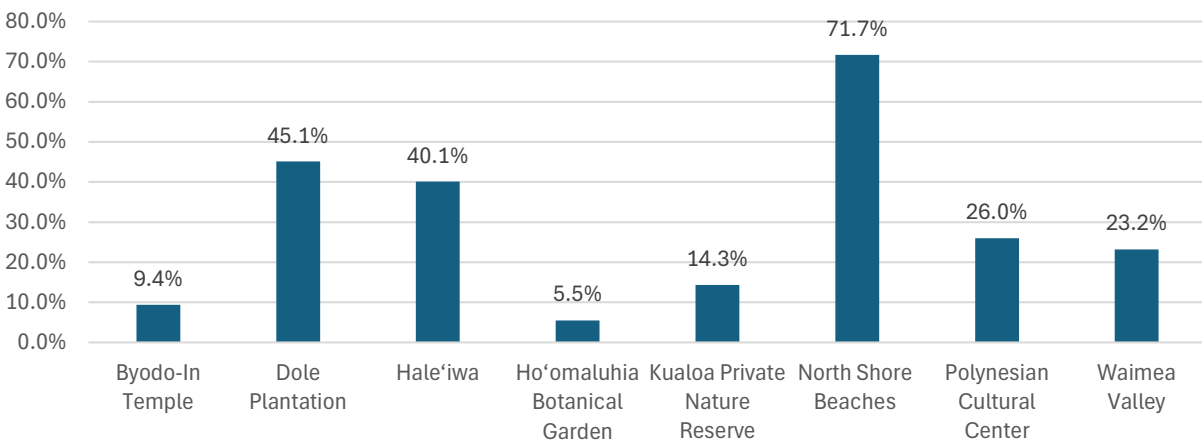
Figure 15. Percentage of O’ahu Visitors who used various modes of transportation: North Shore visitors and O’ahu visitors who did not visit the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data.

Finally, we examined the percentage of North Shore visitors who indicated that they visited attractions in or near the North Shore area. Of the activities below, the activities with the highest percentage participation among visitors who indicated that they visited the North Shore were visiting North Shore beaches (71.7%), Dole Plantation (45.1%), Hale’iwa (40.1%), Polynesian Cultural Center (26.0%), and Waimea Valley (23.2%).

Figure 16. Percentage of North Shore Visitors who visited O’ahu attractions in or near the North Shore, 2019



Source: 2019 Visitor Satisfaction and Activity Survey data. Hale’iwa, North Shore beaches, the Polynesian Cultural Center and Waimea Valley are in the North Shore area.

North Shore Visitor Units

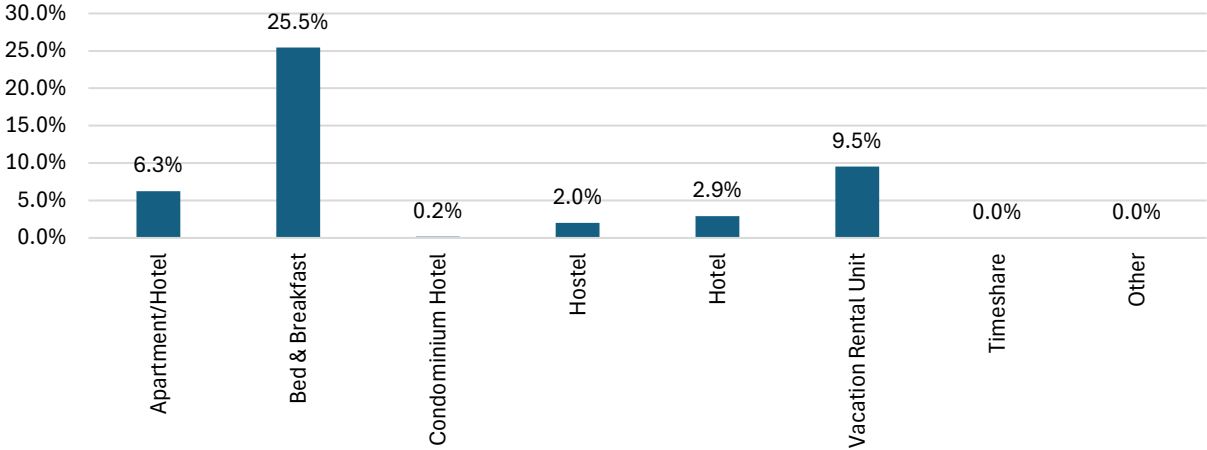
DBEDT, through its Tourism Research Program, conducts a survey each year of statewide visitor accommodations. Based on the 2023 Visitor Plant Inventory, the North Shore had 1,237 visitor units in 2023, up 1.6 percent from 1,217 visitor units in 2022.⁸ North Shore visitor units comprised 3.1 percent of visitor units on O’ahu and 1.5 percent of all visitor units in the state. North Shore hotel rooms made up 2.9 percent of all hotel rooms on O’ahu while North Shore vacation rental units comprised 9.5 percent of all O’ahu vacation rental units.⁹ North Shore bed & breakfast units represented 25.5 percent of all units at O’ahu bed & breakfast facilities.

Table 5. Visitor Units by Accommodation Type: North Shore, O’ahu, and the State, 2023

| Visitor Unit Type | North Shore | O’ahu | State |
|----------------------|--------------|---------------|---------------|
| Apartment/Hotel | 2 | 32 | 48 |
| Bed & Breakfast | 14 | 55 | 490 |
| Condominium Hotel | 7 | 3,789 | 8,450 |
| Hostel | 4 | 197 | 292 |
| Hotel | 786 | 27,022 | 43,261 |
| Vacation Rental Unit | 424 | 4,442 | 16,710 |
| Timeshare | 0 | 3,753 | 12,231 |
| Other | 0 | 225 | 399 |
| Total | 1,237 | 39,515 | 81,881 |

Source: 2023 Visitor Plant Inventory produced by Kloninger & Sims Consulting LLC for DBEDT

Figure 17. North Shore Share of O’ahu Visitor Units, by Accommodation Type, 2023

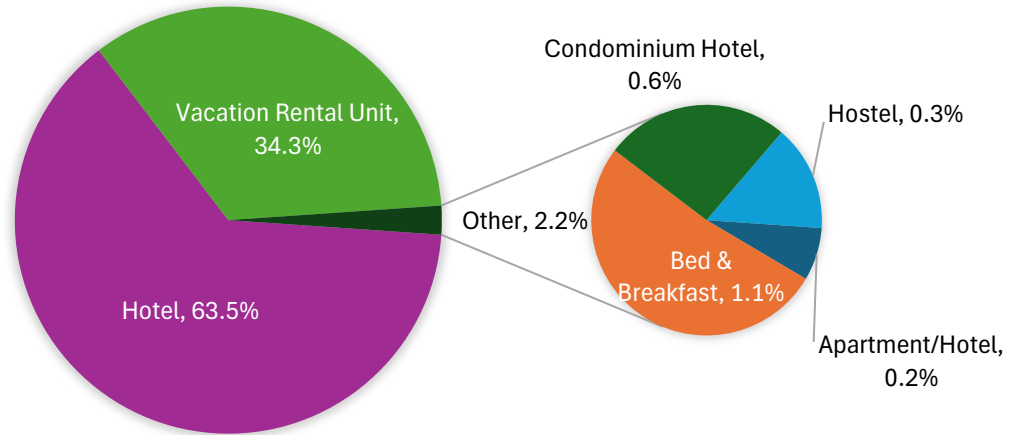


Source: 2023 Visitor Plant Inventory produced by Kloninger & Sims Consulting LLC for DBEDT

⁸ By comparison, visitor units grew 1.0 percent statewide. Visitor units on O’ahu grew 0.9 percent.
⁹ A vacation rental unit (VRU) is defined as an individual rental unit available for visitor use on a short-term basis (30 days or less). VRUs may be located in a condominium hotel, rental house, or other type of rental property. See the Definitions section of DBEDT’s 2023 Visitor Plant Inventory report for descriptions of each type of visitor unit.

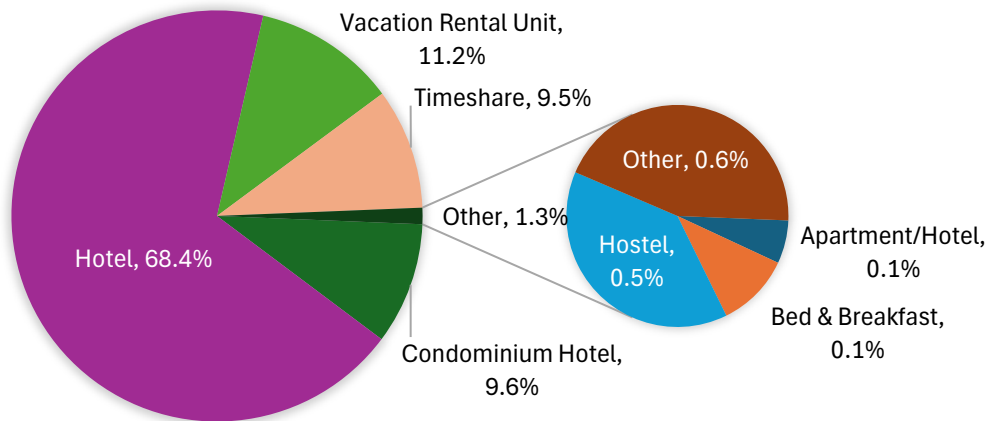
As shown in Figure 18, hotel rooms (63.5%) and vacation rental units (34.3%) accounted for nearly all of the visitor units in the North Shore. Hotel rooms and vacation rental units also make up a large portion of visitor units for O‘ahu and the state, however, timeshares and condominium hotels contribute a significant share of visitor units as well. See Figures 19 and 20. As of 2023, no timeshare units were located in the North Shore and there were few (7) condominium hotel units.

Figure 18. North Shore Visitor Units by Accommodation Type, 2023



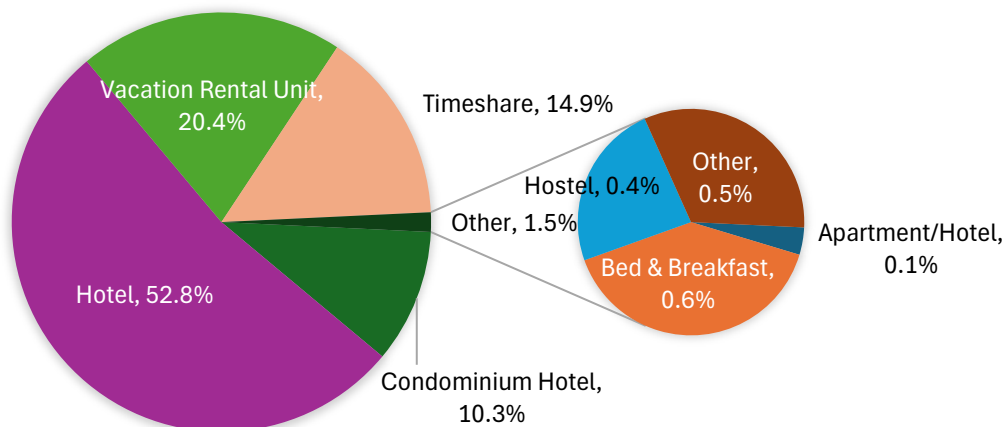
Source: 2023 Visitor Plant Inventory produced by Kloninger & Sims Consulting LLC for DBEDT. Calculations by DBEDT.

Figure 19. O‘ahu Visitor Units by Accommodation Type, 2023



Source: 2023 Visitor Plant Inventory produced by Kloninger & Sims Consulting LLC for DBEDT. Calculations by DBEDT.

Figure 20. State of Hawai'i Visitor Units by Accommodation Type, 2023



Source: 2023 Visitor Plant Inventory produced by Kloninger & Sims Consulting LLC for DBEDT. Calculations by DBEDT.

North Shore Resident Sentiment Regarding Tourism

The North Shore area, as defined by the area corresponding to State House District 47, has a resident population of 29,027 based on the U.S. Census Bureau's 2018-2022 American Community Survey 5-year data. Based on DBEDT's calculations, the North Shore's daytime population, adjusted for commuters, residents temporarily absent, and visitors present in the North Shore area, is 35,809.¹⁰ With an estimated average of 12,088 visitors in the North Shore area on a typical day,¹¹ this indicates that one in three persons in the North Shore on a typical day is a visitor.

The Resident Sentiment Survey is administered by Omnitrak on behalf of DBEDT to residents across the state to track resident attitudes toward tourism in Hawai'i, including perceived positive and negative impacts of the visitor industry on local residents, to identify issues or concerns regarding tourism for the visitor industry and HTA, and to explore resident perceptions on how to manage or mitigate negative impacts. The following summarizes some of the sentiments expressed by North Shore area residents between 2021 and 2024. A full description of resident sentiment findings is available in the Resident Sentiment Survey Reports posted in the Visitor Statistics section of the DBEDT website.¹²

As shown in Figures 21 through 28, North Shore resident sentiment toward tourism has been mixed. The majority of North Shore residents surveyed generally responded that tourism has been worth the issues associated with it, though the percentage of residents agreeing with this statement steadily decreased between Spring 2021 and Spring 2023, falling to 38 percent in Spring 2023,

¹⁰ For further detail regarding the North Shore daytime population calculation, see DBEDT, Oahu's North Shore: A Profile of Its Residents and Businesses, September 2024.

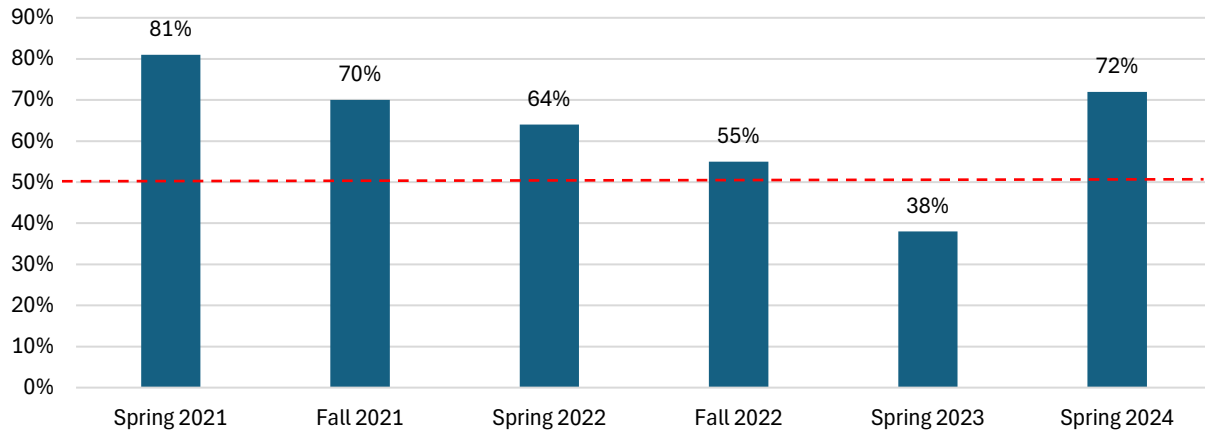
https://dbedt.hawaii.gov/economic/reports_studies/

¹¹ As this is an average, the number of visitors to the North Shore will be higher during peak periods and lower during off-peak periods.

¹² <https://dbedt.hawaii.gov/visitor/resident-sentiment-survey-report/>

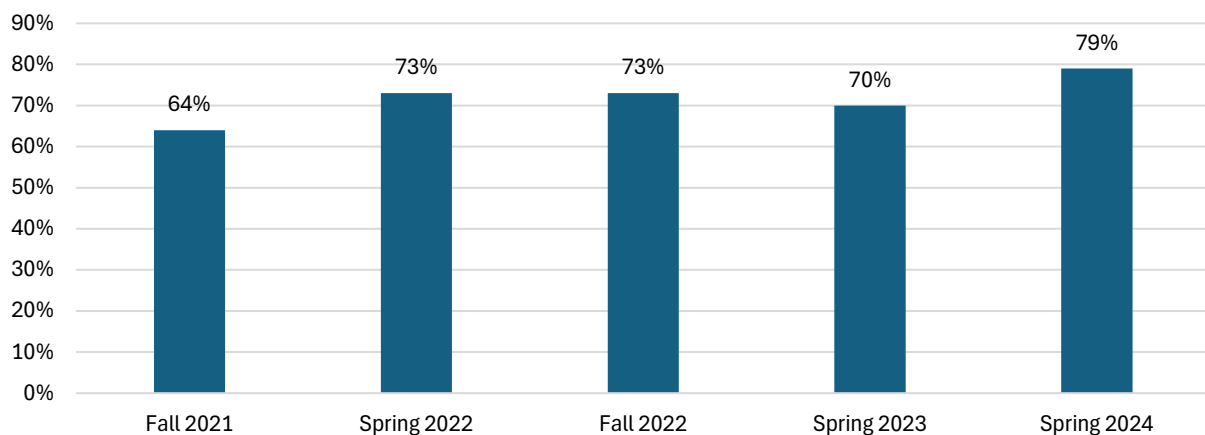
before jumping up to 72 percent in Spring 2024. See Figure 21. North Shore residents have consistently expressed that the “island is being run for tourists at the expense of local people” (Figure 22) and only half of North Shore residents in Spring 2024 responded that the impact of tourism on them and their family has been positive (Figure 23). Prior to Spring 2024, fewer than half of North Shore residents surveyed responded that the impact of tourism on them and their families was positive.

Figure 21. “Tourism is worth the issues associated with it”: Percentage of North Shore residents providing a rating of 6-10, Spring 2021 – Spring 2024



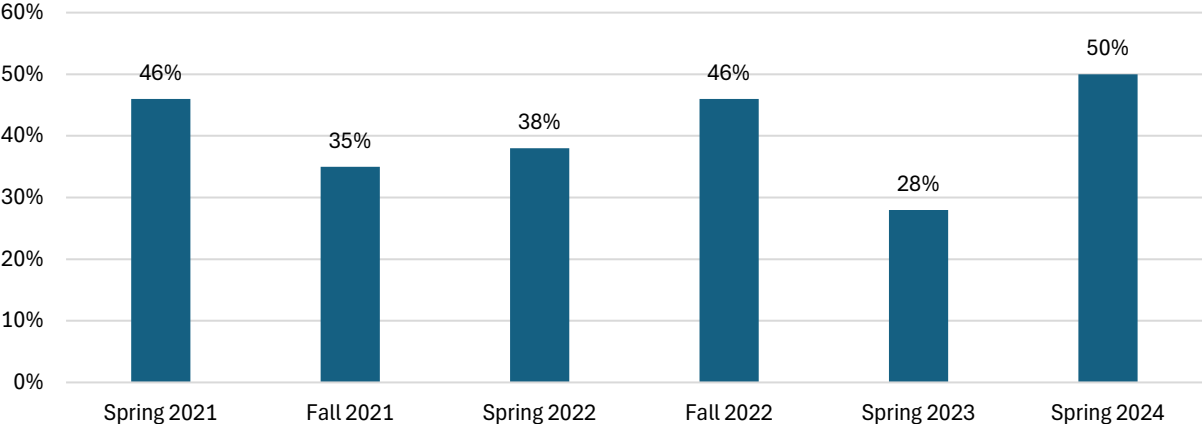
Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Spring 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

Figure 22. "This island is being run for tourists at the expense of local people." Percentage of North Shore residents providing a rating of 6-10, Fall 2021 - Spring 2024



Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Fall 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

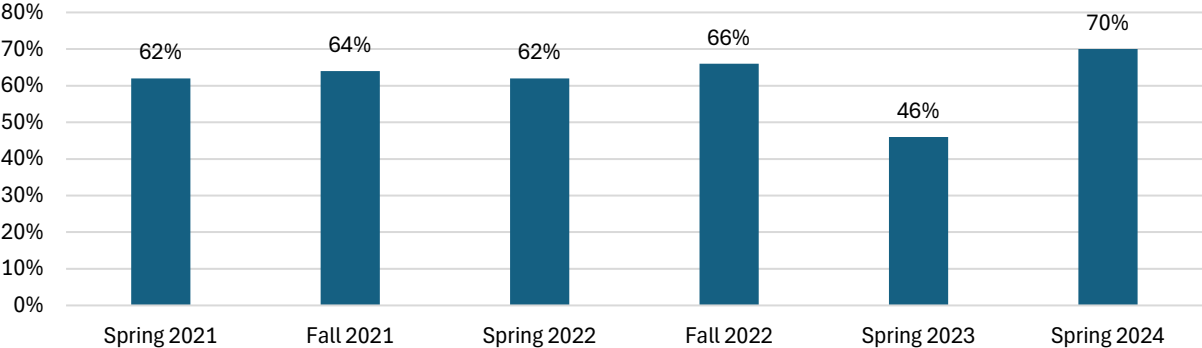
Figure 23. (Positive) Impact of Tourism on You and Your Family. Percentage of North Shore residents providing a rating of 6-10, Spring 2021 – Spring 2024



Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Spring 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Extremely Positive and 1 means Extremely Negative.

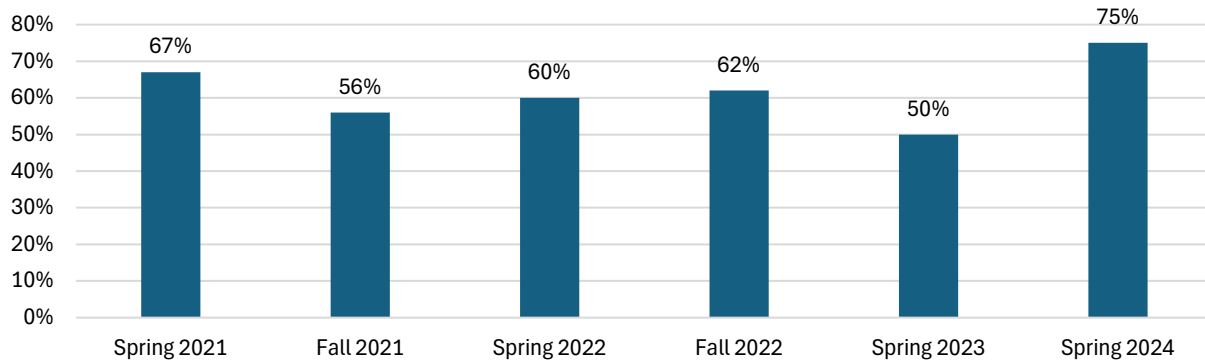
North Shore residents have generally recognized that tourism creates shopping, dining, and entertainment opportunities for residents, creates job opportunities with paths for advancement, and supports our local businesses like retail, dining, etc. See Figures 24 through 26.

Figure 24. Tourism “creates shopping, dining, and entertainment opportunities for residents.” Percentage of North Shore residents with a rating of 6-10, Spring 2021 - Spring 2024



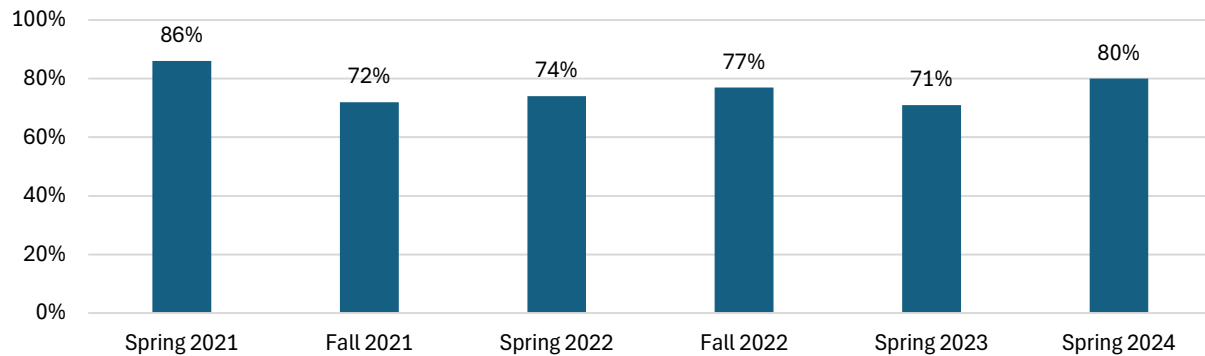
Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Spring 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

Figure 25. Tourism "creates job opportunities with paths for advancement." Percentage of North Shore residents with a rating of 6-10, Spring 2021 - Spring 2024



Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Spring 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

Figure 26. "Tourism supports our local businesses like retail, dining, etc." Percentage of North Shore residents providing a rating of 6-10, Spring 2021 - Spring 2024



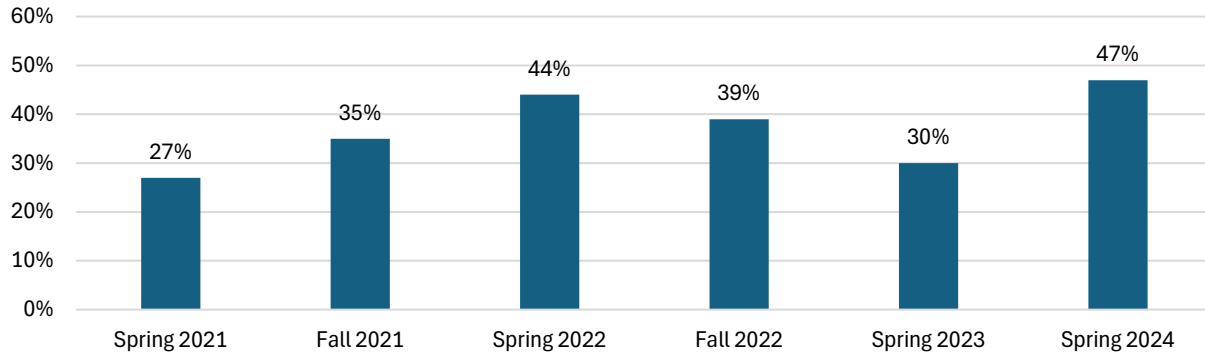
Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Spring 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

While not broken out by geographic area, the top problems identified by Hawai'i residents who believe that tourism has created more problems than benefits in Spring 2024 are: higher prices/higher cost of living, damage to the environment, lack of respect for culture/tradition/'āina and overcrowding. Omnitrak notes that the percentage of respondents who identified overcrowding as a problem dropped from 74 percent of respondents in the Spring 2023 to 65 percent of respondents in the Spring 2024. Omnitrak believes that this is a positive sign that tourism management efforts are having an impact.¹³ To this end, a higher percentage of North Shore respondents indicated in Spring 2024 that they felt that more effort was being made to balance the economic benefits of tourism with quality of life for residents (47%) and that tourism was being better managed (50%) than in prior years. In Spring 2024, 79 percent of North Shore residents

¹³ Resident Sentiment Survey – Spring 2024, at slide 14.

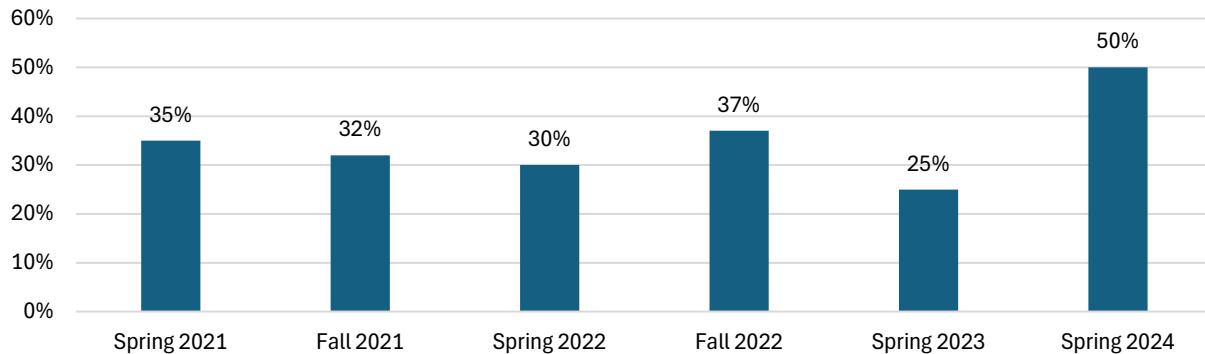
surveyed believed that tax dollars should be spent to “manage the impacts of tourism in my community.”¹⁴

Figure 27. “I feel like more effort being made to balance the economic benefits of tourism and quality of life for residents.” Percentage of North Shore residents providing a rating of 6-10, Spring 2021 - Spring 2024



Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak, Spring 2021 - Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

Figure 28. “I feel like tourism is being better managed on my island.” Percentage of North Shore residents providing a rating of 6-10, Spring 2021 - Spring 2024



Source: Resident Sentiment Survey Reports prepared for DBEDT by OmniTrak between Spring 2021 and Spring 2024. Responses were based on a 10-point scale where 10 is Completely Agree and 1 means Do Not Agree at All.

Conclusion

The North Shore, known for its legendary beaches and surfing, cultural attractions such as the Polynesian Cultural Center, food trucks, historic Hale'iwa town, and home to the Turtle Bay Resort, is a popular visitor destination. Based on data from 2018 – 2021 Visitor Satisfaction Surveys, DBEDT estimates that 52.5 percent of all visitors by air to O'ahu visited the North Shore in 2023. Approximately three-fourths of these visitors were from the U.S.

¹⁴ Resident Sentiment Survey – Spring 2024, at slide 133.

Visitor spending attributed to the North Shore can be estimated under assumptions about the number of days visitors spent in the North Shore and the motivation for their visit. If North Shore visitors' primary motivation to come to Hawai'i was to stay in the North Shore or North Shore visitors included an "extra" day in their trip to participate in North Shore activities, approximately \$1.1 billion of visitor spending in 2023 may be attributed to the North Shore. When direct, indirect and induced impacts were considered, this \$1.1 billion in visitor spending is estimated to have contributed \$1.9 billion in output, \$532.1 million in earnings, and 9,834 in total jobs to O'ahu in 2023; or \$2.0 billion in output, \$553.5 million in earnings, and 10,335 in total jobs statewide. If North Shore visitors would have still come to Hawai'i were they unable to stay in the North Shore or if they would have substituted other activities for North Shore activities, however, these estimates will overstate the spending and economic impacts attributed to the North Shore.

To examine demographic differences between North Shore visitors and those who did not visit the North Shore, DBEDT requested a special tabulation of the 2019 Visitor Satisfaction and Activity Survey. The 2019 survey was used because COVID-19 related travel restrictions impacted the number of visitors available to sample in 2020 and 2021 and the question regarding areas visited while on O'ahu was not included in the 2022 or 2023 surveys. Based on the 2019 survey data, North Shore visitors were slightly younger and more likely to be female compared to O'ahu visitors who did not go to the North Shore. North Shore visitors generally reported higher participation rates across a range of activities compared to visitors who did not go to the North Shore, especially for outdoor activities such as going to scenic views or natural landmarks, going to the beach or sunbathing, swimming in the ocean, snorkeling, hiking, and going to parks/botanical gardens. North Shore visitors were also more likely to report frequenting food trucks, local shops and artisans, historic military sites, and lū'aus, Polynesian shows and/or hula shows.

This report does not address or quantify the impacts that visitors may have on factors such as traffic, the environment, or the cost of living. Based on DBEDT's Resident Sentiment Surveys, North Shore residents largely recognize that tourism creates job opportunities as well as shopping, dining and entertainment opportunities for residents, and that tourism supports local businesses such as those in retail and dining. At the same time, surveyed residents expressed concern about the island being "run for tourists at the expense of local people" with less than half of North Shore residents in Spring 2024 indicating that tourism has been "mostly positive" for them and their families. The percentage of North Shore residents that believe that tourism has been worth the issues associated with it decreased from 81 percent in Spring 2021 to 38 percent in Spring 2023 before jumping up to 72 percent in Spring 2024. North Shore resident responses in Spring 2024 suggest that a greater share of residents felt more effort being made to balance the economic benefits of tourism with quality of life for residents (47%) and that tourism was being better managed (50%) than in prior years, up from 30 percent and 25 percent, respectively, in Spring 2023.¹⁵

¹⁵ DBEDT Resident Sentiment Survey – Spring 2024, prepared by OmniTrak for DBEDT, July 2024. <https://files.hawaii.gov/dbedt/visitor/RSS/Resident-Sentiment-Spring2024.pdf>

Appendix. O'ahu Visitor Satisfaction Survey Map

Map of O'ahu

The following question and map were included in the 2018 through 2021 Visitor Satisfaction Surveys conducted by Anthology Research on behalf of HTA and DBEDT.

In which of the following areas did you stay or visit during your trip on O'ahu? *(Select all that apply)*

