NORTH SHORE VISITOR STUDY

CREDENTIALS: The study is carried out by Brigham Young University-Hawaii Marketing Research students including: Nguyen Pham Seymour (Lead Marketing Researcher) and the following team members: Hidenori Sakai, Tserenniyam Sukhbaatar, Chia-Yu Chou, Tashiana Kahaialii, Andrew Crawford, Kami Strait, Chris Tapia, Alex Martinez, Kayoung Venzon, Matthew Crandall, Brendan Aoki, Josh Levenson, and Spencer Deavila, under the direction of Dr. Lenard Huff, Professor of Marketing.
I. INTRODUCTION

As a project in our Marketing Research class at BYU Hawaii, we conducted research to provide the North Shore Chamber of Commerce and its members with insights regarding the characteristics, perceptions and behavior of visitors to the North Shore. Based on a Request for Proposal provided by the North Shore Chamber, the objectives of this research included:

1) Examine the market demographics and visitors’ expenditures at the North Shore.
2) Examine what factors influence and motivate visitors to visit and make subsequent purchases at the North Shore.
3) Examine consumer behaviors at the North Shore.
4) Identify visitors’ perceptions and attitudes towards the North Shore.
5) Gain insights regarding how the North Shore can improve customer satisfaction and loyalty.

II. METHODOLOGY

We began our research by becoming more acquainted with the history and attractions of the North Shore. Part of this exploratory research included observing visitors at various locations throughout the North Shore. We also studied results of two surveys of North Shore visitors administered by the Hawaii Department of Business, Economic Development and Tourism in 2003 and 2005. From this preliminary research, we developed a three-page survey that took participants an average of eight minutes to complete. The survey, which is shown in Appendix I, includes questions designed to measure:

- Customer characteristics
- Type of visitor (First time vs. repeat, day trip vs. overnight)
- Areas visited and activities participated in
- Mode of travel
- Decision process (Reasons for visiting the North Shore, when the decision to visit the North Shore was made, and sources of information)
- Customer satisfaction
- Spending patterns
- What customers like about the North Shore and how they feel the North Shore could improve

Hard copies of the surveys were given to visitors at various locations throughout the North Shore, including Dole Plantation, North Shore Marketplace, Aoki’s/Matsumoto’s Shave Ice, tour bus drop-off point in Haleiwa, Waimea Bay, Shark’s Cove Marine Life Conservation District, Turtle Bay Resort and Giovanni’s Shrimp Truck in Kahuku. Some sites proved more productive than others. Perhaps a disproportionate number of surveys were gathered at Aoki’s and Matsumoto’s Shave Ice and the Tour Bus drop-off point in Haleiwa.
**Characteristics of the Sample**

A total of 215 surveys were completed. Characteristics of the sample are shown in the following charts:

As shown, females comprised 55% of the sample and males 45%. Average age was 36.5 years. Average household income was in the $75,000 – 99,999 range. The average North Shore visitor spends from $4,000 – 6,000 per year per household on travel each year. Sampled visitors came from the following regions:

- United States West (Mountain, Pacific and Alaska time zones) 28.5%
- Japan 21.5
- Hawaii 21.0
- United States East (Central and Eastern time zones) 16.8
- Canada 4.2
- Other 7.9

**III. RESULTS**

As mentioned, the survey was designed to measure the following:

- Visitor travel behaviors
- Areas visited and activities participated in
- Decision process (Reasons for visiting the North Shore, when the decision to visit the North Shore was made, and sources of information)
- Spending patterns
- Customer satisfaction and perceptions
A. North Shore Visitors’ Travel Behaviors

First-time vs. Repeated Visitors, Day vs. Overnight Trip

In our sample, 53% were repeat visitors and 47% were first-time visitors to the North Shore. Overall, the majority of visitors come to the North Shore on a day-trip (70%). However, the percent of visitors who stay overnight varies widely, depending on where the visitor is from. As shown, only 12.5% of visitors from Hawaii and 6.1% of visitors from Japan and Korea stay overnight. However, 36.8% of visitors from U.S. West (west of the Central time zone), 55.9% of visitors from U.S. East (Central and Eastern time zones), and 63.2% of visitors from Canada and Europe stay overnight.

<table>
<thead>
<tr>
<th>Percent of Day Trip Versus Overnight Visitors By Region</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Day Trip</td>
</tr>
<tr>
<td>Overnight</td>
</tr>
</tbody>
</table>

Number of Nights Spent on the North Shore

Among those who stay at the North Shore overnight, the average number of nights spent was 5.4, distributed as follows.
Accommodation Mode

As shown below, the most popular accommodations for those staying overnight on the North Shore are hotels (41%), vacation rentals (19%), private homes (15%), and condos (13%).

Size of Travel Party

While some visitors reported traveling in parties of 10 or more (mostly Japanese visitors traveling on tour buses), the vast majority traveled in groups of 2 (38.0%), 3 (16.0%) and 4 (20.7%).
Method of Travel

The majority of visitors travel to the North Shore by car (75%), followed by tour bus/limousine (22%) and city bus (3%).

There is a significant difference between the form of transportation used by Asian tourists, Hawaii residents, and other tourists (including U.S., Canada, Australia, New Zealand and Europe). All Hawaii residents and 91.5% of U.S. and other visitors travel by car, while 76.9% of Japanese and Korean visitors travel by tour bus or limousine.

<table>
<thead>
<tr>
<th>Travel Mode</th>
<th>U.S. and Other Visitors</th>
<th>Hawaii Residents</th>
<th>Japanese and Korean Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>107</td>
<td>44</td>
<td>10</td>
</tr>
<tr>
<td>Tour bus/limousine</td>
<td>5</td>
<td>0</td>
<td>40</td>
</tr>
<tr>
<td>City bus</td>
<td>5</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>117</td>
<td>44</td>
<td>52</td>
</tr>
</tbody>
</table>

Travel Route

To get to North Shore attractions, the majority of tourists travel through the Pineapple Fields to Waialua/Haleiwa (57%), while 41% travel along Windward Coast to Turtle Bay/Sunset Beach (41%) and a few took both routes (2%).

B. Areas Visited and Activities Participated In

Areas Visited

Respondents in our sample were asked which areas they planned to visit during their trip to the North Shore. As shown in the following graph, 84.7% came to visit Haleiwa, followed by Dole Plantation and the Pineapple Fields (59.5%), Waimea Bay, Pipeline and Sunset Beaches (45.1%), Turtle Bay and the Kahuku Shrimp Trucks (42.3%) and Laie and the Polynesian Cultural Center (33%). We cannot say for certain that
these numbers accurately reflect the percentage of all North Shore visitors who visit these areas since the large majority of our sample was taken in Haleiwa. As an example, the Polynesian Cultural Center (PCC) was likely under-represented since we did not collect data there and many of their visitors come expressly to visit the PCC and return to Waikiki without visiting the rest of the North Shore.

**Popular Activities on the North Shore**

The ten most popular activities that visitors engaged in during their most recent visit to the North Shore are:

1. Going to the Beach 76%
2. Shopping 61%
3. Eating Shave Ice 59%
4. Eating at Restaurants 56%
5. Visiting Dole Plantation 46%
6. Eating at Shrimp or Food Trucks 42%
7. Snorkeling 35%
8. Wildlife Watching 32%
9. Polynesian Cultural Center 30%
10. Surfing/Body Boarding 28%

![Bar chart showing popular activities on the North Shore]

**C. Decision Process When Deciding To Visit the North Shore**

**Sources of information for planning**

The majority of North Shore visitors plan their visit ahead of time (66%) and only a few decide to visit the North Shore after their arrival to Hawaii (28%).

The following are the six sources of information that visitors mostly commonly use when planning their trips to the North Shore:

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>47%</td>
</tr>
<tr>
<td>Word of Mouth</td>
<td>36%</td>
</tr>
<tr>
<td>Personal experience from past visits</td>
<td>34%</td>
</tr>
<tr>
<td>Magazines/Newspapers/Books</td>
<td>27%</td>
</tr>
<tr>
<td>Travel Agents</td>
<td>25%</td>
</tr>
<tr>
<td>Travel Guides</td>
<td>19%</td>
</tr>
</tbody>
</table>

![Bar chart showing sources of information for planning]
Visitors’ Motives to Visit the North Shore

Visitors were asked, “Why did you decide to visit the North Shore?” In analyzing visitors’ responses, we identified seven major themes, as shown in the chart entitled, “Visitors’ Motives”. The top motive to come to the North Shore was its country atmosphere that sets it apart from Waikiki (25%). The majority of those who wrote “Not Waikiki” were Hawaiian residents and U.S. visitors.

The second major motive was that the North Shore was part of a tour (24%). All visitors that mentioned they come to the North Shore as “a part of their tour packages” were from Japan.

The third major motive is to experience the North Shore’s beaches (15%). The majority of visitors mentioning “Beaches” were from the United States, Australia and New Zealand.

Other important motives included “Surf” (12%), “Relaxation” (12%) and “Fun and Adventure” (7%).

D. Visitor Spending Patterns

The following table shows average expenditure per day per category while visiting the North Shore for each of eight regional groups

<table>
<thead>
<tr>
<th></th>
<th>Food and Beverage</th>
<th>Entertainment</th>
<th>Transportation</th>
<th>Shopping</th>
<th>Lodging</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Average</strong></td>
<td>1.7</td>
<td>2.2</td>
<td>1.5</td>
<td>1.9</td>
<td>2.3</td>
</tr>
<tr>
<td>Hawaii</td>
<td>1.4</td>
<td>1.7</td>
<td>1.5</td>
<td>1.7</td>
<td>1.6</td>
</tr>
<tr>
<td>U.S. West</td>
<td>2.0</td>
<td>2.3</td>
<td>1.5</td>
<td>2.1</td>
<td>3.0</td>
</tr>
<tr>
<td>U.S. East</td>
<td>1.9</td>
<td>2.4</td>
<td>1.4</td>
<td>1.7</td>
<td>2.3</td>
</tr>
<tr>
<td>Canada</td>
<td>2.1</td>
<td>2.6</td>
<td>1.8</td>
<td>2.5</td>
<td>4.4</td>
</tr>
<tr>
<td>Japan</td>
<td>1.5</td>
<td>2.3</td>
<td>1.6</td>
<td>2.2</td>
<td>1.1</td>
</tr>
<tr>
<td>Korea</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Australia/NZ</td>
<td>2.3</td>
<td>3.0</td>
<td>1.0</td>
<td>1.6</td>
<td>2.9</td>
</tr>
<tr>
<td>Europe</td>
<td>2.0</td>
<td>2.0</td>
<td>1.0</td>
<td>1.0</td>
<td>4.5</td>
</tr>
</tbody>
</table>

1 Measured on the following scale: 1= $0-49  2= $50-99  3= $100-149  4= $150-199  5= $250-299  6= $300+

There were some particularly interesting findings, such as:

- Canadians spend more than average on every category and substantially more on entertainment, shopping and lodging.
- Not surprisingly, Hawaii residents spend less than average on all categories but transportation, but only significantly less on entertainment and lodging.
- U.S. West visitors spend more than average on food and beverage and lodging.
- Most interesting is that the Japanese are about average in all categories except lodging, where they spend considerably less. Japanese, who are generally known as extravagant shoppers in Hawaii, only spend slightly more than average on shopping. The Koreans, on the other hand, spend the least possible amount in every category. The lower than expected spending by Japanese and Koreans is probably due to the fact that they typically visit the North Shore with a tour group and are allowed little time to stay and spend.

**Factors that Influence Spending.** We were also interested in understanding how certain factors may influence spending in each of the above categories. In particular, we ran regression analyses in which spending for a particular category was the dependent variable and the following were independent variables: (1) Whether the visitor stayed overnight or came for a day trip only, (2) The number of nights stayed in the North Shore, (3) the visitor’s household income and (4) the amount the visitor’s household spent on travel per year. We found the following:

- **Food and Beverage** spending per day is strongly influenced by all four factors. Namely, visitors who stay overnight, who stay more nights, who have higher household incomes and who spend more on travel per year spend significantly more for Food and Beverage than others.
- **Entertainment** spending per day is greater for those who stay overnight and for those who spend more on travel per year, but is not influenced by the number of nights that visitors stay or their household income.
- **Transportation** spending per day is greater for those who stay more nights, but is not influenced by the other variables.
- **Shopping** spending per day is greater for those who spend more nights and who have greater household incomes, but is not significantly affected by the amount a household spends on travel per year.
- **Lodging** spending per day, not surprisingly, is greater for those who stay overnight and for those who stay more nights. It is also greater for those who spend more on travel per year, but is not influenced by household income.

**E. Customer Satisfaction and Perceptions**

**Customer Satisfaction and Future Behavior.**

Customers reported the degree to which they were satisfied with their overall visit, as well as a number of aspects of the North Shore. They also indicated how likely they would return and recommend the North Shore to others. Results are shown in the two tables included in Appendix 2. The most interesting findings include:

- Overall satisfaction (3.6 on a 4-point scale) is high, as are satisfaction for the North Shore’s “country atmosphere,” “cultural experience,” “big waves,” “recreation,” “beaches” and “scenery and natural attractions”. The average satisfaction for these aspects all equal or exceed 3.6.

- Satisfaction is lower than average for “shopping” (3.3) and “transportation” (3.2), and much lower for “infrastructure” (2.7) and “sufficient accommodations” (2.8).

- Overall, North Shore visitors are highly likely to return (3.5) and to recommend the North Shore to others (3.6).
• Though their numbers are small, Canadians and Koreans appear to be the most satisfied, most likely to return and to recommend the North Shore to others.

• The Japanese are generally less satisfied than average and are much less satisfied than almost all other groups on the following:
  o Accommodations
  o Entertainment
  o Hospitality of the people
  o Overall satisfaction
  o North Shore exceeded expectations
  o Will likely return
  o Will recommend the North Shore to others
  o Infrastructure is adequate

We also ran regression analyses to determine how certain factors would influence a visitor’s likeliness to return and to recommend the North Shore to others. We found that:

• Repeat visitors are more likely to return, but are not significantly more likely to recommend the North Shore to others than first-time visitors.
• The extent to which visitors feel that infrastructure is adequate positively influences both their likelihood to return and to recommend the North Shore to others.
• The extent to which visitors feel that accommodations are sufficient does not significantly affect their likelihood to return or to recommend the North Shore to others.
• As expected, the greater a visitor’s overall satisfaction, the more likely they will return and recommend the North Shore.

Perceptions of the North Shore

A. What Visitors Like About the North Shore

Visitors were asked the open-ended question, “What do you like most about the North Shore?” A number of themes emerged, which we group into four major categories:

Beautiful Nature. The following sub-themes group around this theme:
• Beaches 48 responses
• Beauty/scenery/nature 34 responses
• Surf/waves/ocean 26 responses

Country and Small Town Atmosphere. This includes:
• Rural/Country/Old Town Atmosphere 53 responses
• Local Businesses/Shops 22 responses

People/Aloha Spirit/Laid Back Attitude 28 responses

Good and Unique Food
• Shave Ice 23 responses
• Food/Restaurants 22 responses

Surfing and Recreational Activities 10 responses
B. How Can The North Shore Improve?

Visitors provided open-ended responses to the question, “How can the North Shore improve?” A number of themes emerged, as shown below:

The two dominant themes were:

**Better Infrastructure.** This includes the following sub-themes:
- **Better Infrastructure** 58 responses
- **Less Traffic** 18 responses
- **Improve/More Bathrooms** 13 responses
- **More/Better Parking Lots** 5 responses
- **Transportation/Bus Inconvenient** 5 responses

The biggest complaint about the infrastructure was that roads had too many potholes. Other visitors suggested that more sidewalks and bike paths should be created. A few visitors mentioned that they were almost hit by a car. One person mentioned that it was hard to find bathrooms and they were located at far distances. One visitor suggested that traffic could probably be reduced if there were more sidewalks for people to walk on and more bike paths.

**Keep the North Shore Country.** This includes:
- **Stay the same** 19 responses
- **Keep it rural/country** 14 responses
Technically, keeping the North Shore Country isn’t an improvement, but it does show that a significant group of people – mostly Hawaii residents and visitors from the U.S. West – treasure the country atmosphere and laid-back vibe of the North Shore. For them, new development that would change the rural, laid-back nature of the North Shore would clearly not be an improvement.

IV. SUMMARY AND RECOMMENDATIONS

First, we would like to thank the North Shore Chamber of Commerce for the opportunity to work on this project. It was a valuable learning experience for us. Hopefully, we have been able to provide important insights.

In summary, we gathered data from 215 visitors of the North Shore, focusing on visitor characteristics, motives, decision processes, satisfaction, future behaviors, and perceptions. A large portion of our surveys were gathered in Haleiwa. We also purposefully did not gather data at the Polynesian Cultural Center, the most popular paid attraction in Hawaii, so some results may be skewed. However, our sample does represent typical North Shore visitors who come for the total experience, rather than a quick visit to the PCC.

We won’t rehash the results in this section. Instead, we focus on what we believe is the greatest contribution of the study: understanding how the North Shore of Oahu is positioned in the minds of customers. We then provide some recommendations for consideration.

A. Positioning the North Shore of Oahu

Turtle Bay Resort recently changed its positioning strategy to emphasize its link to “Oahu’s Fabled North Shore”. Clearly, marketers of Turtle Bay feel that Oahu’s North Shore is a brand with a distinct brand identity that resonates with target visitors throughout the world. But just exactly what is that identity? Just what does the North Shore mean in the minds of visitors? Knowing how visitors view the North Shore can help marketers of the North Shore and its businesses develop strategies for cultivating and communicating a consistent brand image.

Results from this study paint a clear picture of the North Shore’s current brand identity. We’ll discuss this brand identity by considering four dimensions of brands: Attributes, Benefits, Values and Personality. The more clearly customers can identify a brand’s unique attributes, benefits, values and personality, the stronger the brand.

Brand Attributes. Attributes are the features or characteristics of a brand. Features most commonly attributed to the North Shore include:

- World class beaches
- World class waves, surf and ocean.
- Activities associated with world class waves, surf and ocean, especially surfing.
- Country atmosphere.
- Laid-back people with a laid-back vibe.
- Shave ice, shrimp trucks and other unique foods
- Small, family-run, local shops.
- Old country town of Haleiwa.
Brand Benefits. Benefits that visitors seek when coming to the North Shore include:
- Escape the crowds of Honolulu and Waikiki
- Relax in the country
- Have fun and adventure
- Experience the “real Hawaii”, perhaps a “lost” Hawaii where time seems to have stood still.

Brand Values. With a strong brand, customers know that the brand stands for something, that it has values. In customers’ minds, the North Shore’s brand values include:
- A love of, and commitment to nature and the environment
- A respect for tradition
- Hospitality and Aloha
- Authenticity
- Fun
- Adventure

Brand Personality. A strong brand takes on personal qualities. If the North Shore were a person, it would be:
- Fun-loving
- Laid-back
- Warm
- Adventurous
- A surfer
- A nature-lover, especially of the ocean
- Country: Hawaiian style
- Local

B. Recommendations

1. **Cultivate the North Shore Brand and its Uniqueness.** Hopefully, the above gives marketers insights into how the North Shore is perceived, especially by those most familiar with the area. Those marketing the entire North Shore as a destination should cultivate this image of country, small town, world-class surf, laid-back vibe, unique foods and culture. It definitely should be positioned against Waikiki and Honolulu as the anti-Waikiki. Sometimes the North Shore is positioned as “Oahu’s neighbor island”. It is that, to an extent, but it should be more than that, especially given the North Shore’s reputation as a mecca for surfing.

2. **Recognize and Market the Totality of the North Shore.** When asked, “Why did you come to the North Shore” and “What do you like about the North Shore”, a handful of visitors replied “Everything!!!” and “The North Shore has something for everyone in the family.” The North Shore is known for a number of separate features: the world-class surf, turtles, shave-ice, shrimp trucks, country atmosphere, laid-back vibe, small town, beautiful beaches, whale watching, funky locally-owned stores and restaurants, the Polynesian Cultural Center, etc., etc. Any one of these is great, but it is the total package that makes the North Shore so special.

3. **Improve the Infrastructure.** While visitors love the laid-back vibe and the relaxed country atmosphere, they would clearly prefer better infrastructure, including sidewalks, better roads,
better signage, improvements that would lessen traffic (such as at Laniakea Beach) and more and better maintained restrooms.

4. **Provide More Accommodations.** This will require careful planning. Any new development that would dramatically change the nature and personality of the North Shore should be shunned. However, a major complaint of visitors is the lack of appropriate accommodations. Results show that visitors who stay overnight, and then stay for longer periods of time, spend more per day than those who just come for the day. With proper planning, more accommodations may even reduce some problems, such as traffic, since visitors wouldn’t feel rushed to drive through all of the North Shore in one day.

5. **Coordinate Marketing Efforts: Co-Branding and Packages.** North Shore businesses are isolated from each other and tourists tend to know about North Shore businesses only through Internet and Word of Mouth. We recommend that North Shore businesses work together in their marketing efforts. For instance, every time a tourist goes to the Dole Plantation they should have discounts or promotions there for shaved ice. When people go to get shaved ice there should be flyers for surf lessons. When they go to the surf shop they should give them coupons for kayak tours… This way the business stays on the North Shore and people that are making day trips will see that there is a lot more to do in the North Shore. A related idea would be to work together to provide packages to customers, in which different activities and food and shopping experiences are combined into daily or multi-day packages.

6. **Keep the Beaches Clean & Promote Events**
One of the North Shore’s biggest attractions has always been its lush scenery and its captivating beaches. Our study shows that beaches - including the world-famous surf and snorkeling - are still the main attraction and biggest single selling point that the North Shore has to offer. They appeal to a wide range of audiences, from people who come only to observe, to those who dare to venture in and take on the waves. We recommend that the North Shore Chamber of Commerce (NSCOC) look for new ways and opportunities to promote the amazing beaches of the North Shore. The NSCOC could try to promote and build more awareness of the different types of events and entertainment that take place on the beaches. Firstly, Sporting Events satisfaction is a significant factor that predicts shopping expenditure as well as F&B expenditure, this will increase revenues for North Shore businesses. Secondly, better awareness means that more people would intentionally plan to come to the North Shore instead of happening to come across them coincidentally. We also suggest looking for more opportunities to sponsor or host beach cleanup activities. This benefits the surrounding communities and keeps the beaches beautiful for those who are coming to visit.

These are just a few recommendations that North Shore businesses and the North Shore Chamber of Commerce should consider. It is our hope that marketers will gain further insights from the results of the study that can help them strengthen their businesses and that can help the North Shore strengthen its brand.
Official North Shore Visitors Survey

North Shore Chamber of Commerce

Research by Marketing Students From BYU-Hawaii

Book # ________
Location __________________________________________
APPENDIX 1

North Shore Visitor Survey

Aloha! This survey focuses on visitors to the North Shore. For our purposes, the North Shore includes everything from Dole Plantation to Kaena Point to Kualoa Ranch. The survey takes about 8 minutes to complete. Your answers will be kept strictly confidential. Your help will be appreciated.

1. How many people are in your travel party (including yourself)? ______

2. Where do you live? City ___________________ State (if U.S.) or Country __________________

3. When visiting the North Shore, how are you traveling? ____ Car ____ Tour bus/limousine ____ City bus

4. Is this your first visit to the North Shore? ____ YES (Skip to question 6) ____ NO (Go to Question 5)

5. Including this visit, how many times have you visited the North Shore? _____ times

6. During this visit, how many days will you spend on the North Shore? _____ days

7. Are you visiting the North Shore on a day trip or will you stay overnight or longer?
   - Day Trip Only ➔ [SKIP TO QUESTION 10]
   - Overnight ➔ [CONTINUE to Question 8]

8. How many nights will you stay in the North Shore on this trip? _____ nights

9. On your overnight visit to the North Shore, what type of accommodations are you staying in?
   - Hotel
   - Condo
   - B&B
   - Time Share
   - Private Home
   - Vacation Rental
   - Other Specify ____________

10. On this trip to the North Shore, which areas will you visit? (check all that apply)
    - Dole Plantation/Pineapple Fields
    - Mokuleia/Kaena Point/Dillingham Airfield
    - Waialua/Waialua Sugar Mill
    - Haleiwa
    - Waimea Bay/Banzai Pipeline/Sunset Beach
    - Waimea Valley/Pu’u O Mahuka Heiau
    - Pupukea/Shark’s Cove
    - Turtle Bay Resort/Kahuku Shrimp Trucks
    - Turtle Bay
    - Kualoa Ranch
    - Laie/Polynesian Cultural Center

11. Which route did you take to come to the North Shore?
    - Through Pineapple Fields to Waialua/Haleiwa
    - Along Windward Coast to Turtle Bay/Sunset Beach

12. While on your most recent visit to Oahu’s North Shore, which of the following activities did you (or will you) participate in? [Please check all that apply]
    - Surfing / Body Boarding
    - Windsurfing / Kite Surfing
    - Snorkeling
    - Paddling (canoe) / Kayaking
    - Jet skiing
    - Diving
    - Golfing
    - Wildlife watching (birds, turtles, whales)
    - Hiking
    - Spa/Wellness
    - Eating Shave Ice
    - Historic Haleiwa Town/Walking Tour
    - Horseback Riding
    - Bicycling/Mountain Biking
    - Going to Beach
    - Glider/Hang Gliding/Sky Diving
    - Watching Big Surf/Contests
    - Shopping
    - Visiting Polynesian Cultural Center
    - Visiting Mormon Temple
    - Deep Sea Fishing
    - Eating at shrimp or food trucks
13. Why did you decide to visit the North Shore? ________________________________________________________________

14. When did you decide to visit the North Shore?
   - BEFORE Arrival to Hawaii
   - AFTER Arrival to Hawaii

15. Which of the following sources of information did you use when you were planning your most recent trip to Oahu’s North Shore? (Please check all that apply)
   - Travel agents
   - Companies specializing in packaged tours
   - Airline/commercial carriers
   - Hotel or resort concierge or staff
   - Hawaii Visitors Bureau
   - Visitor Publications on Street/Hotel
   - Magazines/Newspapers/Books
   - Travel Guides
   - Internet
   - North Shore Chamber of Commerce
   - Advice from friends or relatives
   - Personal experience from past visit(s)

16. Thinking only about your most recent trip, how satisfied are/were you with the North Shore’s…

<table>
<thead>
<tr>
<th></th>
<th>Very Dissatisfied</th>
<th>Dissatisfied</th>
<th>Satisfied</th>
<th>Very Satisfied</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country atmosphere</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Cultural experience</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Big waves/surf</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Recreational experience</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Sporting events</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Beaches</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Restaurants</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Shopping</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Accommodations</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Entertainment</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Transportation</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Scenery/Natural Attractions</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Hospitality of the People</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

17. Please indicate the degree to which you agree or disagree with the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall, I am satisfied with my visit to Oahu’s North Shore</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>My experience on the North Shore has exceeded my expectations</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I will likely return to visit the North Shore again</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I will recommend a visit to Oahu’s North Shore to friends and relatives</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>The infrastructure (roads, sidewalks, parking, restrooms, parks) is adequate</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>There are sufficient accommodations on the North shore</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>
18. On average how much have you spent (or plan to spend) per day on the North Shore in each of the following categories:

<table>
<thead>
<tr>
<th>Category</th>
<th>$0-49</th>
<th>50-99</th>
<th>100-149</th>
<th>150-199</th>
<th>200-249</th>
<th>250-299</th>
<th>300+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverage</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment &amp; Recreation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lodging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19. What do you like most about the North Shore? __________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

20. In your opinion, how could the North Shore improve? __________________________________
____________________________________________________________________________________
____________________________________________________________________________________

The following information is for statistical purposes only and will be kept strictly confidential.

21. What is your age? ______

22. What is your gender?
   □ Male
   □ Female

23. What is your household income? (check one)
   □ Less than $50,000 per year
   □ $50,000 – 74,000 per year
   □ $75,000 – 99,999 per year
   □ $100,000 – 124,999 per year
   □ $125,000 – 149,999 per year
   □ $150,000 or greater per year

24. What is your occupation? ___________________________________________________

25. Approximately how much does your household spend on travel each year? (for all expenses, including transportation, lodging, food, shopping, entertainment, activities, etc.)
   □ Less than $2,000 per year
   □ $2,000 – 4,000 per year
   □ $4,001 – 6,000 per year
   □ $6,001 – 8,000 per year
   □ $8,001 – 10,000 per year
   □ More than $10,000 per year

Thank you for your help in completing this survey!!
## APPENDIX 2

### Average Customer Satisfaction Scores on Aspects of the North Shore

<table>
<thead>
<tr>
<th></th>
<th>Overall Average</th>
<th>Hawaii</th>
<th>U.S. West</th>
<th>U.S. East</th>
<th>Canada</th>
<th>Japan</th>
<th>Korea</th>
<th>Australia and NZ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country Atmosphere</td>
<td>3.6</td>
<td>3.7</td>
<td>3.7</td>
<td>3.8</td>
<td>3.6</td>
<td>3.3</td>
<td>4.0</td>
<td>4.0</td>
</tr>
<tr>
<td>Cultural Experience</td>
<td>3.6</td>
<td>3.7</td>
<td>3.6</td>
<td>3.8</td>
<td>3.4</td>
<td>3.1</td>
<td>3.3</td>
<td>4.0</td>
</tr>
<tr>
<td>Big waves</td>
<td>3.6</td>
<td>3.8</td>
<td>3.5</td>
<td>3.8</td>
<td>3.3</td>
<td>3.1</td>
<td>4.0</td>
<td>4.0</td>
</tr>
<tr>
<td>Recreational Experience</td>
<td>3.6</td>
<td>3.7</td>
<td>3.5</td>
<td>3.5</td>
<td>3.9</td>
<td>3.3</td>
<td>3.7</td>
<td>3.0</td>
</tr>
<tr>
<td>Sporting events</td>
<td>3.5</td>
<td>3.7</td>
<td>3.5</td>
<td>3.4</td>
<td>3.6</td>
<td>2.4</td>
<td></td>
<td>3.8</td>
</tr>
<tr>
<td>Beaches</td>
<td>3.7</td>
<td>3.8</td>
<td>3.7</td>
<td>3.8</td>
<td>3.4</td>
<td>3.5</td>
<td></td>
<td>4.0</td>
</tr>
<tr>
<td>Restaurants</td>
<td>3.4</td>
<td>3.7</td>
<td>3.4</td>
<td>3.5</td>
<td>3.1</td>
<td>3.1</td>
<td>4.0</td>
<td>4.0</td>
</tr>
<tr>
<td>Shopping</td>
<td>3.3</td>
<td>3.6</td>
<td>3.6</td>
<td>3.4</td>
<td>2.8</td>
<td>3.1</td>
<td>3.2</td>
<td>3.7</td>
</tr>
<tr>
<td>Accommodations</td>
<td>3.3</td>
<td>3.6</td>
<td>3.3</td>
<td>3.6</td>
<td>3.5</td>
<td>2.1</td>
<td></td>
<td>3.5</td>
</tr>
<tr>
<td>Entertainment</td>
<td>3.5</td>
<td>3.6</td>
<td>3.5</td>
<td>3.6</td>
<td>3.8</td>
<td>2.8</td>
<td></td>
<td>3.9</td>
</tr>
<tr>
<td>Transportation</td>
<td>3.2</td>
<td>3.3</td>
<td>3.6</td>
<td>3.7</td>
<td>3.6</td>
<td>2.3</td>
<td>4.0</td>
<td>3.6</td>
</tr>
<tr>
<td>Scenery</td>
<td>3.7</td>
<td>3.7</td>
<td>3.8</td>
<td>3.9</td>
<td>3.6</td>
<td>3.2</td>
<td>4.0</td>
<td>3.9</td>
</tr>
<tr>
<td>Hospitality</td>
<td>3.5</td>
<td>3.7</td>
<td>3.5</td>
<td>3.9</td>
<td>3.4</td>
<td>3.2</td>
<td>3.7</td>
<td>3.6</td>
</tr>
</tbody>
</table>

1 Measured on a 4-point scale with “1” being “Very Dissatisfied” and “4” being “Very Satisfied”.

### Overall Satisfaction and Future Behavior

<table>
<thead>
<tr>
<th></th>
<th>Overall Average</th>
<th>Hawaii</th>
<th>U.S. West</th>
<th>U.S. East</th>
<th>Canada</th>
<th>Japan</th>
<th>Korea</th>
<th>Australia and NZ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Satisfied</td>
<td>3.6</td>
<td>3.7</td>
<td>3.7</td>
<td>3.7</td>
<td>3.9</td>
<td>3.2</td>
<td>4.0</td>
<td>3.4</td>
</tr>
<tr>
<td>N.S. Exceeded Expectations</td>
<td>3.4</td>
<td>3.4</td>
<td>3.4</td>
<td>3.5</td>
<td>3.7</td>
<td>2.9</td>
<td>4.0</td>
<td>3.4</td>
</tr>
<tr>
<td>Will Likely Return</td>
<td>3.5</td>
<td>3.8</td>
<td>3.6</td>
<td>3.7</td>
<td>3.9</td>
<td>2.9</td>
<td>4.0</td>
<td>3.6</td>
</tr>
<tr>
<td>Will Recommend N.S.</td>
<td>3.6</td>
<td>3.7</td>
<td>3.7</td>
<td>3.7</td>
<td>3.9</td>
<td>3.1</td>
<td>4.0</td>
<td>3.6</td>
</tr>
<tr>
<td>Infrastructure Is Adequate</td>
<td>2.7</td>
<td>2.9</td>
<td>2.7</td>
<td>3.0</td>
<td>2.8</td>
<td>2.0</td>
<td>3.0</td>
<td>2.4</td>
</tr>
<tr>
<td>Accommodations Are Sufficient</td>
<td>2.8</td>
<td>3.0</td>
<td>2.9</td>
<td>3.4</td>
<td>3.0</td>
<td>1.8</td>
<td>2.5</td>
<td>3.3</td>
</tr>
</tbody>
</table>

2 Measured on a 4-point scale with “1” being “Strongly Disagree” and “4” being “Strongly Agree”.