



The North Shore Economic Vitality Partnership

On behalf of the North Shore Economic Vitality Partnership, it is our pleasure to present an in-depth examination of future opportunities in both the North Shore Experience and Sustainable Agriculture & Working Landscapes industry clusters, while also examining how Professional & Technical Services fits into a regional action plan.

One of the key discoveries from both research and our recent meeting discussions is how intertwined our region's clusters are. The North Shore Experience cluster would not attract the number of visitors that it does without the stunning backdrop that the natural land provides. Both the Sustainable Agriculture & Working Landscapes cluster and the North Shore Experience cluster share a commitment to maintaining the beauty of the land, while incorporating these assets to support and grow the local economy. From discussions with local business leaders, both of these clusters would benefit from a unified North Shore brand that could be easily spread through various forms of media, something that the Professional & Technical Services cluster could lend a hand in.

A coordinated effort to support these dynamic clusters aligns with broader regional priorities: respecting the land, maintaining the heritage and culture of our region, and enhancing community wellbeing and economic prosperity. This report chronicles these relationships and provides us with a starting point to expand and connect our regional industry clusters.

This cluster study represents the beginning of what we hope will be many shared endeavors by our business community and serves as a foundational document for the implementation of the region's Economic Strategy Plan. In order for these efforts to be successful, business leaders will need to work collaboratively and strategically. We encourage you to be part of this new, collaborative effort to preserve our unique assets, while creating prosperity within and throughout the region.

Best regards,

Kevin Kelly

University of Hawai'i &
North Shore Community Resident

Susan Matsushima

Alluvion, Inc.

John Morgan

Kualoa Ranch

Larry Jefts

The Farm/Sugarland

Marty Thomas

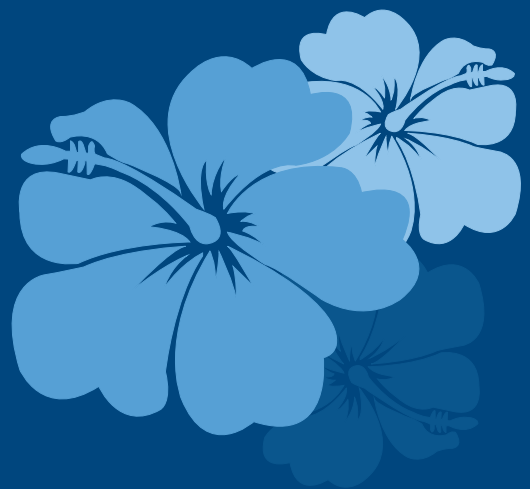
Van's Triple Crown of Surfing

DEVELOPING A SHARED AGENDA FOR THE NORTH SHORE OF O‘AHU’S ECONOMIC VITALITY AND COMMUNITY WELL-BEING

Draft Action Plan

November 2013

**Prepared by
Collaborative Economics**



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The North Shore Economic Vitality Partnership includes:

Kevin Kelly - Chair
University of Hawai'i &
North Shore Community Resident

Susan Matsushima - Co-Chair
Sustainable Agriculture & Working Landscapes
Alluvion, Inc.

Larry Jefts - Co-Chair
Sustainable Agriculture & Working Landscapes
The Farm/Sugarland

John Morgan - Co-Chair
North Shore Experience
Kualoa Ranch

Marty Thomas - Co-Chair
North Shore Experience
Van's Triple Crown of Surfing

Project Stewards

David Baker, Kahuku Sugar Mill
Doug Cole, North Shore Community Land Trust
Kalani Fronda, The Kamehameha Schools
Danna Holck, Turtle Bay Resort
T. Michael Moser, Windward Community College
Antya Miller, North Shore Chamber of Commerce
Kathleen M. Pahinui, Anthology Marketing Group
Lee Sichter, Lee Sichter LLC
Ron Weidenbach, Hawai'i Fish Company
Carolyn Unser, First Wind

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Collaborative Economics works with senior executives from business, foundations, government, education and community sectors - helping them create breakthroughs in how people think and act regarding their region. Collaborative Economics' clients have the passion, vision and commitment to blaze a new pathway for their community. They understand that a new kind of leadership is required to create great places, with thriving economies and world-class quality of life.

Kim Held - Project Manager
Clare Brown - Database Manager
Bridget Gibbons - Designer
Francie Genz
Doug Henton
John Melville

Lisa Gibson, Rising Tide Economics

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INTRODUCTION

The North Shore¹ of the island of O‘ahu is world renowned for its natural beauty and is recognized as a ‘must see’ destination for more than half of the almost five million tourists visiting the island each year.² However, the verdant valleys and pristine beaches are only the cover of a complex rural community with deep roots to the land and a cultural history reaching back generations. The region finds itself at a crossroads with communities searching to balance increased development pressure and the need for affordable housing with the desire to conserve open spaces and still provide new economic growth opportunities.

North Shore communities want to understand the dynamic economic landscape of the region and engage in activities that build on traditional industries of agriculture and tourism, while creating new economic opportunities.³ Development of an economic plan will focus on identifying regionally appropriate areas that preserve the unique natural assets of the region, while also bolstering the economy to create jobs for residents.

Hawai‘i’s state motto is “the life of the land is perpetuated in righteousness” and this should be an important goal of this economic strategy—to implement a shared agenda for economic vitality and community well-being in the North Shore that builds on the shared values of Hawai‘i and the North Shore.

Based on data analysis of business establishments and findings supported by local business, economic development and workforce development partners, the following clusters (represented by the following industries) were chosen.⁴

Sustainable Agriculture & Working Landscapes includes grocery stores, markets, nurseries, florists, caterers, specialty restaurants,⁵ food processing, farming, veterinary services, agricultural support, marinas, aquaculture, film production companies, ranches, environmental and wildlife groups, urban and rural planning and development, conservation programs and resource management.

North Shore Experience contains museums, recreational tours, uniquely Hawai‘i manufacturing,⁶ clothing and souvenir stores, fashion, artwork, ocean recreation & surfing, accommodation, transportation and travel agencies.

Professional & Technical Services is made up of a range of businesses including technical consulting, diagnostic imaging centers, computers, information technology, finance and investment services, communications equipment manufacturing, electronics maintenance and repair, data services and architecture and engineering services.⁷

¹ See Appendix A for a list of the Zip Codes used to define the North Shore Region.

² North Shore Chamber of Commerce. Population & Economic Statistics. Web.

³ See Appendix A for the project background and for the definition of a “Cluster of Opportunity”.

⁴ See Appendix C for the lists of cluster industry NAICS codes.

⁵ Specialty Restaurants are restaurants on the North Shore that either embody the Hawai‘ian experience or make the effort to source their food locally.

⁶ Uniquely Hawai‘i Manufacturing includes all goods produced in Hawai‘i, especially those relating to the Hawai‘ian culture such as ukuleles and surfboards.

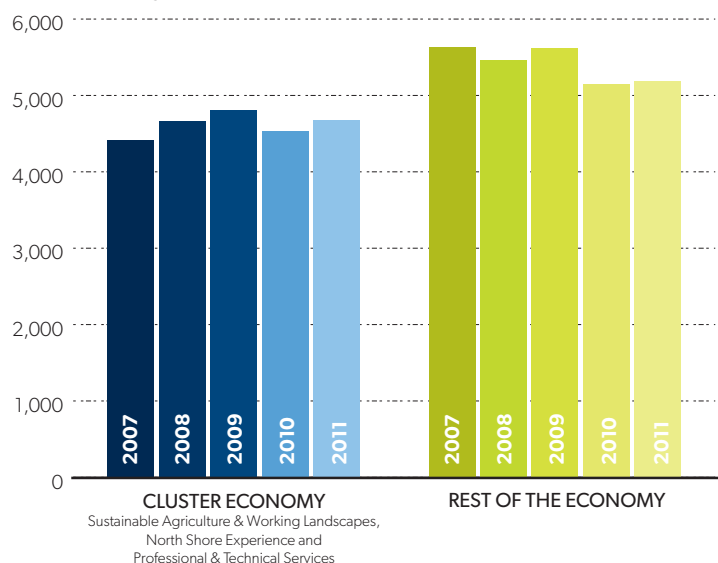
⁷ See Appendix B for further analysis of the Professional & Technical Services Cluster.

THE NORTH SHORE'S CLUSTER ECONOMY

The North Shore's long-term (2001-2011) job growth has been driven by the cluster-based economy. **Over this period, the number of jobs in the region's cluster economy grew 23 percent, while the number of jobs in the rest of the economy grew 11 percent.**⁸ Combined, this represented an overall 16 percent job growth in the North Shore over the decade, compared to a ten percent gain in Hawai'i.

The North Shore's cluster economy has proven to be more resilient than the rest of the regional economy. During the recession, the cluster-based economy declined 2.8 percent between January 2008 and January 2010, while non-cluster industries decreased 5.7 percent (Figure 1). After this hit, the North Shore's cluster economy rebounded more quickly (increasing 3% between 2010 and 2011) than the rest of the economy (increasing less than 1%).

Figure 1
Total Employment
North Shore Region, 2007-2011



Data Source: National Establishment Time-Series Database (NETS)
Analysis: Collaborative Economics

Figure 2
Clusters of Opportunity
North Shore Region, 2011

| | Employment | Percent of the Total North Shore Economy | Establishments | Percent of Job Growth 2001-2011 |
|--|--------------|--|----------------|------------------------------------|
| Sustainable Agriculture & Working Landscapes | 1,415 | 14% | 203 | 36% |
| North Shore Experience | 2,978 | 30% | 240 | 23% |
| Professional & Technical Services | 280 | 3% | 98 | 5% |
| Total Cluster Economy | 4,673 | 47% | 541 | 64% |
| Total Economy | 9,865 | 100% | 1,220 | 100% |
| Rest of the Economy | 5,192 | 53% | 679 | 36% |

The region's clusters have a strong competitive advantage. This means there is a greater proportion of North Shore residents employed in these individual clusters than the state average. **The North Shore Experience and Sustainable Agriculture & Working Landscapes clusters are more concentrated⁹ than their respective industries statewide (2.4 and 1.7 respectively)(Figure 3).** Both the Sustainable Agriculture & Working Landscapes and Professional & Technical Services clusters have seen rapid growth over the decade, growing 4.6 percent and 3.9 percent respectively on average each year. **As of 2011, the three clusters accounted for 47 percent of North Shore jobs, but have been responsible for 64 percent of the region's job growth since 2001** (Figure 2).

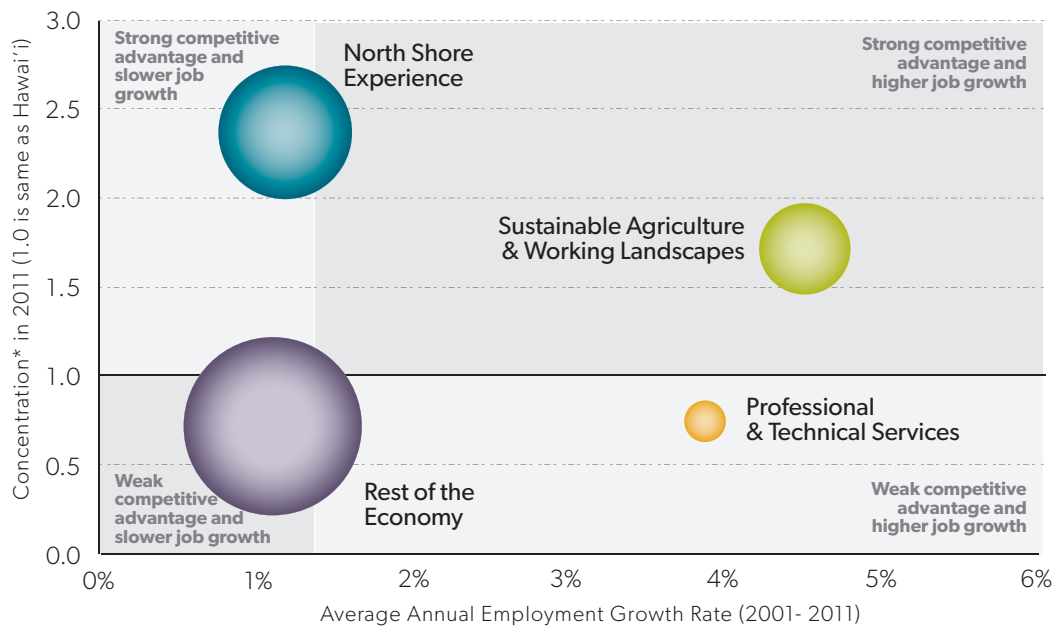
⁸ See Appendix B for further analysis on the Rest of the Economy.

⁹ Employment concentration is a calculation that compares the percentage of employment in a region to the percentage of employment in its state counterpart. (North Shore Cluster Employment/North Shore Total Employment)/(Hawai'i Cluster Employment/Hawai'i Total Employment). A ratio greater than one signifies that employment is more concentrated in the region than it is statewide – an indication of outward orientation and a source of comparative advantage.

Figure 3

Clusters of Opportunity

North Shore Region, 2001-2011



A bubble chart provides perspective on three dimensions: the size, growth and employment concentration (see footnote 7) in a cluster. The x-axis is the average annual employment growth rate between 2001 and 2011. The y-axis is the employment concentration relative to the state of Hawai'i in 2011, and the size of the bubble is the number of jobs in 2011.

*Concentration is calculated as (Northshore Cluster Emp/Northshore Total Emp)/(Hawai'i Cluster Emp/Hawai'i Total Emp)

Size of bubble represents employment size in 2011.

Data Source: National Establishment Time-Series Database (NETS)

Analysis: Collaborative Economics

OPPORTUNITIES FOR THE SUSTAINABLE AGRICULTURE & WORKING LANDSCAPES CLUSTER

The North Shore has a long history of being a land of plenty. During the days of the monarchy, the fertile land of the North Shore was abundant with diversified crops that provided food for the region as well as for Honolulu. ‘Āina momona, literally meaning the fat or abundant land, justly describes the history of the fruitful and rich land on the North Shore.



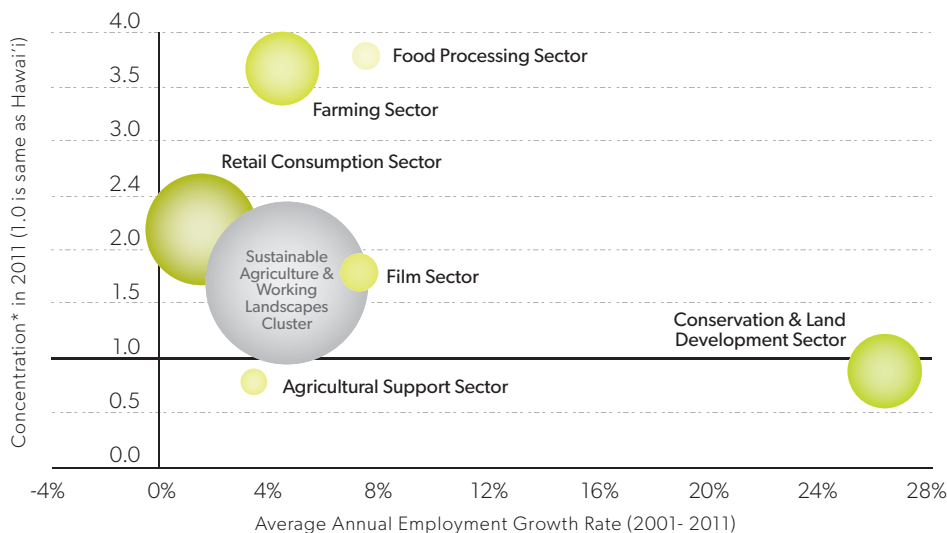
More recently, the main economic driver of the North Shore was big agriculture and the mono-crops of sugar and pineapple. Since the closure of the Waialua Sugar Company nearly two decades ago, the presence of sugar has disappeared. The region has struggled to use the land and infrastructure from the sugar industry to restore the heritage of diversified crops, a heritage that will help reemploy North Shore residents and contribute to the **sustainability** and **food security** of the region.

The Sustainable Agriculture & Working Landscapes cluster includes a range of economic activities that create jobs while promoting the health of the North Shore’s natural environment. Working landscapes contribute to the region’s economy through a range of economic activities including forestry, fisheries, tourism, and land management and conservation. In addition, the North Shore’s agricultural food chain spans a diverse set of industries, from agriculture support and production, to food processing and retail consumption, playing an important role in the vitality of the region. Together, the Sustainable Agriculture and Working Landscapes cluster consists of vibrant local small businesses that support stewardship of the land while contributing to the North Shore economy.

The Sustainable Agriculture & Working Landscapes cluster represents a growth opportunity for the North Shore. The prevalence of ranches and farms and breath-taking scenery, provide ample opportunity for **growth in agricultural tourism** and recreational services, including ranch tours and locations for filming movies. Current water resources for many come from Lake Wilson which is R2 water and cannot be used by farmers who produce leafy green crops. If **adequate clean water** can be provided to farmers, the local industry could take off. The North Shore’s open space and agricultural lands give it its beauty. This rural experience is driving both visitors and Honolulu residents to the North Shore to visit. When people visit the North Shore, they discover its diverse local products, driving demand and increasing visitors.

Figure 4

Major Sectors of the Sustainable Agriculture & Working Landscapes Cluster North Shore Region, 2001-2011



*Concentration is calculated as (Northshore Cluster Emp/Northshore Total Emp)/(Hawai'i Cluster Emp/Hawai'i Total Emp)
Data Source: National Establishment Time-Series Database (NETS)
Analysis: Collaborative Economics

Jobs within the Sustainable Agriculture & Working Landscapes cluster are highly concentrated in the region as compared to the state. Jobs in this cluster represent 14 percent of the North Shore's total employment (Figure 2), while jobs in this cluster represent eight percent of total jobs statewide. The Sustainable Agriculture & Working Landscapes cluster witnessed the strongest job growth of the three clusters between 2001 and 2011 with an annual average growth rate of 4.6 percent (Figure 3). Job growth in this cluster has been aided by the rapid average annual growth rate (26.3%) of the Conservation & Land Development (Figure 4) industries including environmental and wildlife advocacy and urban planning groups.

There is a younger group of leaders on the North Shore who have innovative ideas and want to promote agriculture. Connecting these individuals with veteran farmers who know the lay of the land and the systems in place would help advance a new agenda for **widespread agricultural sustainability** on the North Shore. Some people today confuse subsistence agriculture with sustainable agriculture. A system of mentoring could be introduced, allowing experienced farmers to pass information on production agriculture down to the newer farmers helping to continue to feed the people of Hawaii. Now is the time to act on these opportunities.

REQUIREMENTS TO LEVERAGE OPPORTUNITIES IN THE SUSTAINABLE AGRICULTURE & WORKING LANDSCAPES CLUSTER

Business leaders in the Sustainable Agriculture & Working Landscapes cluster identified opportunities to expand their markets through branding and marketing efforts and also recognized the need to increase awareness of activities occurring within the industry to the broader public.

There is potential for establishing new connections between the North Shore's agricultural products, and the people who buy them. **Branding** and **marketing** will facilitate economic growth in this area. Better communicating the value of the industry (e.g., beautiful landscapes, local food sources, attracting visitors that bring in money to the community) to consumers, residents and voters will help build greater support for growth.

Consumer demand for quality, convenient, assorted, safe and affordable products is vital to the Sustainable Agriculture & Working Landscapes cluster. Recent increased demand for locally grown and raised products has caused consumers to be more concerned with purchasing food from regional producers as opposed to products that are shipped from thousands of miles away. Local sourcing results in fresher products, growing support for the local economy and farmers, and declining consumption of energy resources associated with the transportation of goods. The growing demand for local and sustainable products aligns favorably with the resources in the region.

Branding & Marketing



Marketing is key for the North Shore's agricultural industry to compete against cheaper food being imported from other countries. Hawai'i farmers face keen competition from imports abroad, the estimates for the percentage of food products imported into Hawai'i range from 85 to 90 percent.¹⁰ The North Shore could capitalize on the growing demand for local products with the development of a **"North Shore Grown"** label. This label could be used to help small farms gain wider recognition as part of a larger brand as well by larger farms who could use the brand in conjunction with their own established trademark.

Branding "North Shore Grown" could increase awareness of North Shore products by communicating to locals and visitors where the food is coming from. For example "food to table" markets are leveraged when restaurants specify where ingredients come from on their menus. This niche marketing may focus consumer demand on regionally grown products. In addition to the environmental advantages associated with "local farming" and consumption, people will pay a premium for locally grown products and are more likely to purchase local brands. This synergy between customer and food source will expand the Sustainable Agriculture & Working Landscapes cluster locally to provide a self-sustaining and economically prosperous system.

¹⁰ Rocky Mountain Institute. *Island of Hawai'i Whole System Project Phase I Report*. 2007. Ken Meter. Halweil. Crossroads Resource Center. 2004.



Ag Learning Center/Food Hub

Another way to increase awareness and advertise North Shore Grown products would be to **create an agriculture learning center and food hub**, where farmers can sell premium, fresh, local products to both locals and visitors. This center would help diversify the income stream of many farmers, as well as showcase the agricultural attributes of the region to residents and visitors. This center can create a feeling among the buying public that they are buying more than just a product; they allow customers to create intimate connections between their food and the passionate farmers who grow it. This “supplier connection” idea has been leveraged before by companies such as Whole Foods who display cardboard cutouts of their suppliers for customers to see and place pictures of growers on the labels of the food they produce. This center would help farmers market their own products and support the creation of new markets for regional products as well as new job opportunities for North Shore residents. The center could also contain an educational/learning aspect that would draw in visitors to learn about the agricultural industry of the North Shore, including tours of agriculture processes for school fieldtrips.

Recommended Action

1. Rollout a **comprehensive public awareness campaign** that leverages the resources of the North Shore Experience cluster.
2. Develop a North Shore **ag learning center/food hub**, where farmers can sell premium, fresh, local products. This space could also serve as a visitor and learning center that will draw in both locals and visitors to buy locally made products and to learn about the agriculture industry.

Awareness & Support of the Agricultural Industry



Creating Supportive Policy Environment for Agriculture

Creating Supportive Policy Environment for Agriculture: A thriving agricultural sector requires a supportive policy environment that incentivizes infrastructure investments and ensures adequate access to **clean water**. Current state land use designations disincentivize major, long-term investments in agricultural infrastructure by farmers given the lack of predictability in land use. **Reforming the land use designation system** would help encourage investments in infrastructure that are necessary to bring small agricultural producers to scale.

In addition, sustainable agriculture depends on **stable water resources** and adequate clean water. Many people are under the false assumption that the North Shore has an abundant water supply, but they do not understand that Lake Wilson has an R2 water quality designation (disinfected secondary reclaimed water), that can only be used for crops that are not watered on their surface, which limits its use. A majority of the farmers who utilize the water from Lake Wilson are seed crop farmers. Current Board of Water Supply practices give preference to providing residential water service over that to agriculture because agricultural lands do not provide the tax base that residential properties do. Policy changes that increase the availability and quality of water resources as well as the effective management of wastewater are integral to the viability of agricultural production and the economic vitality of the agricultural sector.

Many positive things are occurring throughout the agriculture industry in the North Shore that should be shared with the greater community. For example, agriculture in the region is more sustainable and consuming fewer natural resources than the days of sugar and pineapple.

Recommended Action

Develop the **“Did You Know?” campaign** educating locals and the broader public about the history of agriculture in the region, highlighting exciting events as well as other unique assets of the industry. Present information in a compelling way and make it easily accessible. This could include a column that would contain prevalent and interesting facts about the agricultural industry, as well as the history of the industry in the region, and could be displayed online (see www.solanogrown.org for an example), provided at the agriculture learning center/food hub, announced on public service stations, sent out via email and even displayed around town on local restaurants, shops and hotels pin boards. Biographies of local producers could also be circulated in a similar manner to serve as a way to connect local residents and growers.

OPPORTUNITIES FOR THE NORTH SHORE EXPERIENCE CLUSTER

The North Shore is a truly special place with its strong Hawai'iian cultural foundation, beautiful scenery, and historical significance. In the winter months, the North Shore becomes the global epicenter of the surfing world, attracting the world's best surfers. While its spectacular beaches and landscapes draw visitors from all over the world, North Shore residents work to preserve their natural habitat and way of life.

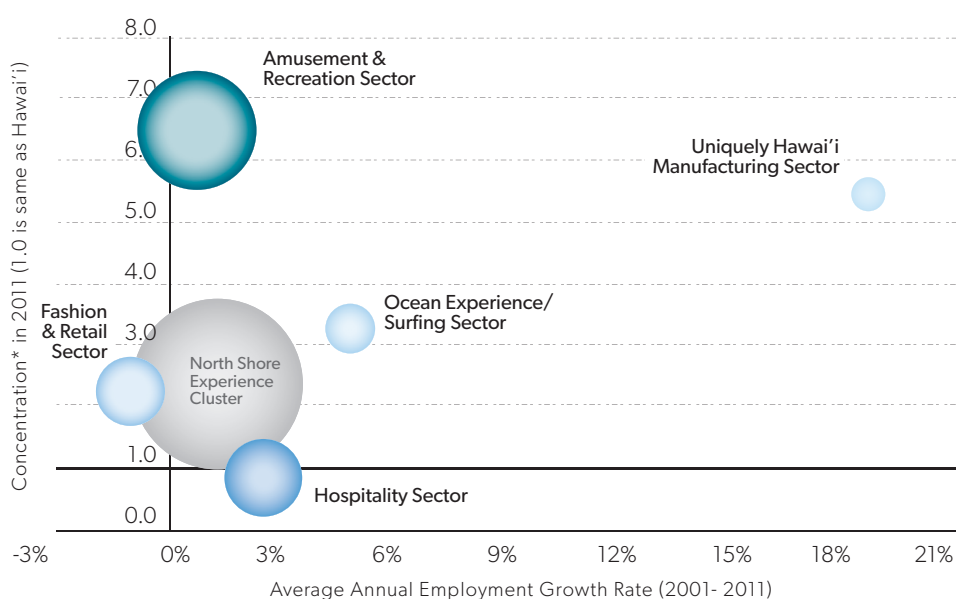
It is the "North Shore Experience", whether staying on the North Shore, shopping for North Shore made products or partaking in one of the many activities that the North Shore has to offer, that keep individuals coming back and that residents hope to preserve. Visitors come to the North Shore for its country feel and to explore the Hawai'i of old. Most overnight visitors stay at Turtle Bay Resort with 443 accommodations (cottages, villas, rooms, suites) and plans are underway for further expansion. Other activities that enhance the visitor experience include the availability of local goods, unique shops, art galleries, restaurants and a range of recreational activities. The Polynesian Cultural Center, which offers luaus, dining and an authentic Polynesian village tours, is Hawai'i's top paid visitor attraction.

Kualoa Ranch is an example of the overlap between the two clusters. Historically the area was used as a 4,000 acre cattle-ranch but has since diversified into industries outside of agriculture, serving as a prime location for filming movies as well as a wedding venue. Additionally, they have integrated other attractions including a restaurant, hula lessons, trail rides and hiking. Harvesting the diverse assets of this area could be a joint effort between both cluster groups.

These elements are integrated to create the North Shore experience—visitors come because of the unique beauty of the region, stay in hotels and engage in recreation while also purchasing goods produced locally.

Amusement & Recreation comprise over half (51%) of the North Shore Experience cluster (Figure 5). This cluster reported an average annual growth rate of 1.2 percent between 2001 and 2011. This was only slightly higher than the rest of the economy's rate of 1.14 percent; however, this cluster was highly concentrated when compared with the state (Figure 3). Also, when broken down, key industries within the cluster grew at a much faster pace. Uniquely Hawai'i Manufacturing, representing four percent of the cluster, grew at an average annual growth rate of 18.5 percent. This sector includes locally made soaps and oils. Similarly, Ocean Experience/Surfing, representing nine percent of the North Shore Experience cluster, grew at an average annual rate of 4.9 percent.

Figure 5
Major Sectors of the North Shore Experience Cluster
North Shore Region, 2001-2011



*Concentration is calculated as (Northshore Cluster Emp/Northshore Total Emp)/(Hawai'i Cluster Emp/Hawai'i Total Emp)
Data Source: National Establishment Time-Series Database (NETS)
Analysis: Collaborative Economics

REQUIREMENTS TO LEVERAGE OPPORTUNITIES IN THE NORTH SHORE EXPERIENCE CLUSTER

Business leaders in the North Shore Experience cluster identified opportunities to expand and improve their markets through **joint infrastructure improvements** and **marketing efforts**. This process would be more successful by identifying and connecting existing *experience* companies to one other.

Branding & Marketing

The North Shore has a specific **brand**, whether it be a unique item produced in the region or a service provided on the North Shore; it is a distinctive region with a distinguishable culture.



Identity

The North Shore has many unique assets that distinguish this region and before determining a logo, marketing materials, etc., the region must first identify an overarching identity that encompasses each of the distinctive assets of the area (e.g., a string of pearls).

Logo

One key component of creating and strengthening the North Shore brand would be to develop a **logo** that has a cohesive look and tagline (see ashevillegrown.com and solanogrown.com for an example) that could be utilized by everyone on the North Shore. This brand could be placed on all North Shore Experience business websites, store fronts, products, etc. This logo would help North Shore businesses to not only advertise to visitors from afar but also to locals and visitors from neighboring regions. The logo could serve the multi-use purpose of displaying North Shore pride, as well as advertising the many services and products the region has to offer.

Co-branding

Manufacturers and vendors could work together and co-brand. Accommodations such as Turtle Bay and Camp Mokule`ia could stock **North Shore Made** products in exchange for being able to purchase them at wholesale prices. This could act as a spotlight and promote the quality of North Shore made products made within the region.

Planned Events

The North Shore Experience brand could be further promoted at **collaborative events**, where people of similar interests come together collaborating with restaurants and other industries in the area. Themes could include Surf Night (screening surf films, board shaping, surf photography and art) and Farm to Table (culinary demonstrations, food market, flowers, etc). These **festivals** would not only attract visitors but would also draw in North Shore residents, further spreading the North Shore brand. This again could be an opportunity to work jointly with the Sustainable Agriculture & Working Landscapes cluster who for example could provide locally grown foods, promoting their own products, at an event for surfing aficionados. Many events such as these are already being organized by individuals on the North Shore. With greater support and marketing, these events could have an even greater reach.

Web Presence

The brand could also be spread using various forms of **social media**. These sites (Facebook, Instagram, Twitter, Yelp, etc.) are free and can be easily updated with photos taken by owners and guests alike. Individual websites and handles (Turtle Bay Resorts is currently #playturtlebay) could all collectively link to one dedicated handle for the North Shore, such as #gonorthshore, #northshorelife, etc. The North Shore Experience handle could also link to **one cohesive North Shore Experience website**. The website could include profiles of local business leaders and companies, products, and services, as well as a news feed about local companies and a joint calendar. Businesses and locations could also partner with Google Places to give visitors a virtual peek of what the North Shore has to offer. [Haleiwa Art Gallery](#) has already done this. This would allow visitors to preview the North Shore as one cohesive experience in one place, introducing visitors to additional attractions that they may not have known existed.





Joint Information Guide

Another way to collectively promote the North Shore Experience would be to create a guide that shows everything that the North Shore has to offer. This guide could be integrated into a **North Shore Phone App**, placed on the **North Shore website** or be distributed at the hotels in the North Shore as well as in Honolulu. Many guests visit the North Shore on their O'ahu vacation and ensuring guests have an enjoyable stay will make them want to return. This plan ties in with a goal of the Professional & Technical Services cluster of bringing broadband to the North Shore. For a phone app to work seamlessly, broadband would need to cover the entire North Shore.

Recommended Action

1. **Establish a brand/identity** that clearly states who the North Shore is, while encompassing the broad assets and distinct characteristics of the region (e.g., string of pearls). Attract the visitor who wants to stay for a few days and experience the unique characteristics of the North Shore.
2. Once an overarching brand is identified, **develop a communication and marketing strategy** to disseminate the message to the broader public, policymakers, legislators, as well as other agencies (e.g., HVB) and communities (e.g., Waikiki, Oahu, Hawai'i) and North Shore visitors through social media, website, etc.

Infrastructure Improvements

The North Shore brand cannot be maintained if visitors have negative experiences when visiting the region, whether it be traffic, locating attractions, parking, or finding restrooms. **Comprehensive transportation and tourism infrastructure** is an asset for both visitors and locals. The lack of convenient roads, restrooms and information booths, to name a few, will deter people from returning to the area.



Road Infrastructure

Another significant issue is traffic. While major road renovations are difficult, if not impossible (e.g., widening highways), alternative routes could be introduced or better communicated. One suggestion would be to create a "scenic route" for tourists that enhances their visual experience while deterring them from taking the main commuting route through towns. Designated parking could also be created at spots where tourists stop most for pictures. There could also be a coalition to advocate for "beautifying" (e.g., tree removal) the sides of the road that afford scenic views.



Community Space & Information Hub

The North Shore currently lacks a central information hub for visitors and locals and a space where business leaders can meet for projects.

Recommended Action

1. Create an **infrastructure planning and finance team** to work on infrastructure issues, such as Laniakea traffic. Utilize available data, brand and assets of the North Shore to speak to legislators with a joint voice.
2. Create a **North Shore Visitor Bureau** to help manage the visitor experience.

MOVING FORWARD AND NEXT STEPS

Businesses in the North Shore have joined together to identify strategic areas for improvement. This report serves as a jumping-off point for continued action and the development of a cluster network throughout the region building off of programs and connecting with efforts already established. **Collaboration between businesses, industry leaders, and other key players will help expand the prosperity of the region.**

Utilizing resources across all of the clusters will help capitalize on the opportunities identified in this report. For example using the Professional & Technical services cluster’s tech savvy and know-how could be used to create a new website (or revamp the chamber’s current website), with a new logo that could be used to promote local products and experiences, educate consumers on the goings on in the area or advertise for local events.

Regional branding has also been identified as a priority across all clusters. One brand and handle (#gonorthshore, #northshorelife, etc.) could be created and utilized by both groups. This could be linked to the joint website and used across all forms of social media. The North Shore Experience and Professional & Technical Services cluster also both expressed the need for shared meeting and work space.

In order to establish these crucial connections, collaboration among industries is necessary. Maintaining **communication between players in each segment of the regional economy** to avoid duplicative work is important. Cluster groups could convene regularly supported by the North Shore Economic Vitality Partnership to enable greater communication among companies to enhance business opportunities (e.g. joint events, marketing, website collaboration, etc.), and collaborate with community partners to address shared challenges (e.g., infrastructure, etc.).

While these improvements have focused largely on changes to local infrastructure, these advancements will enhance the experience for visitors as well. Developing a local brand, sustainable agriculture practices and events based on the unique assets of the region will further define the North Shore area, attracting visitors from near and far and, in turn, promoting prosperity in the region. Economic vitality is critical to sustaining a vital community and high quality of life—driving a vital cycle that produces revenues for public services and amenities, jobs for residents, and products and services for the local population. The North Shore Region has the opportunity to build on its economic strengths to ensure long-term economic vitality and quality of life for its residents.



Meeting Outcomes and Potential Action Team Priorities

To capitalize on these opportunities draft action plans were created using the following matrices at the September meetings. These action plans will be implemented by action teams — made up of individuals from the cluster, as well as leaders the team identifies from business, government, and the broader community willing to work together for a common goal. These action teams will continue to flesh out the priorities identified and get more specific about actions and measurable outcomes. Each action team will require champions (some already identified in the matrices below) that will take responsibility for leading the team, monitoring progress, holding them accountable, organizing meetings and driving the implementation requirements and commitments for their team’s action plan. A network such as the North Shore Economic Vitality Partnership will serve as the overarching body to ensure the success of the effort.

SUSTAINABLE AGRICULTURE & WORKING LANDSCAPES

| PRIORITIES | |
|--|---|
| Priority Outcomes | Priority Strategies |
| Awareness & Support of Agriculture Industry | |
| Raise awareness and support for the cluster among local residents and public officials by better communicating the cluster’s activities and the benefits that it brings to the region (e.g., beautiful landscape, local food source, attracts visitors that bring in money to the community) | Engage the broader community (the general public, policymakers and potential opponents), through the “Did You Know?” campaign, about the value of the cluster to the region’s economic vitality and quality of life |
| Increase supportive policies in local jurisdictions (e.g., water resource planning, long-term land tenure for farmers) | |
| Connection/Shared Priorities with Other Clusters | |
| Branding & Marketing | |
| Combine packaging of North Shore’s unique attractions (e.g., connecting food, festivals, cultural, environmental and recreational assets) in different ways | Launch a unified, regional branding and marketing campaign that: 1. Inventories the full range of farmers, crops and activities in the area 2. Promotes the concepts of “North Shore Grown” and the “North Shore Experience” creating a unified logo, and 3. Support collaborative events (festivals) that showcase the region’s assets |
| Create events with local interest marketed outside the area, resulting in more people traveling to the North Shore and more local residents venturing outside their immediate community or industry to participate | |
| IMPLEMENTATION OUTCOMES | |
| First Steps/Early Wins | Champions |
| Awareness & Support of Agriculture Industry | |
| Develop the “Did You Know?” campaign educating locals and the broader public about the history of agriculture in the region, highlighting exciting events as well as other unique assets of the industry. Present information in a compelling way and make it easily accessible. | Carolyn Unser - branding/marketing campaign, local imagery Susan Matsushima, Larry Jeffs, Mel Matsuda - help kick off the campaign and gather information from players Kapu Smith - communication support via KS strategic ag plan communication Stevie Whalen |
| Branding & Marketing | |
| Rollout comprehensive public awareness campaign. Leverage resources of North Shore Experience cluster. | Ken Kamiya - PR strategy - finance, subject, scheduling, media, etc. Doug Cole - outreach to those not currently in discussion Kevin Kelly - inventory ag assets in the region David Morgan - inventory and start dialogue with ag producers in SE end of target area |
| Develop a North Shore food hub, where farmers can sell premium, fresh, local products. This space could also serve as a visitor and learning center that will draw in both locals and visitors to buy locally made products and to learn more about the agriculture industry. | Eric Bello - learning/activity hub for tours, fill out concept Maria Gallo - anything with education/outreach - informal/formal Jeff Scott - learning center/visitor center Ron Weidenbach - plan a food hub or centralized drop-off distribution point for NS ag and aquaculture products Milton Agader - food hub - assisting producers, wholesalers, restaurants, etc. Jim Keener - scalable farm profitability John McHugh - continue working with all farmers, ranchers, landowners in soil and water conservation districts to address their natural resources concerns |

NORTH SHORE EXPERIENCE

| PRIORITIES | |
|--|--|
| Priority Outcomes | Priority Strategies |
| Connection/Shared Priorities with Other Clusters | |
| Branding & Marketing | |
| Define what the North Shore is to us (the overarching identity), then create marketing material (e.g., a distinct logo that has a cohesive look and tagline, brand statement) | Create a North Shore Experience Network, linking partners in a unified approach and acting as a focal point for cluster companies to come together to: <ol style="list-style-type: none">1. Develop materials and market the region, including hosting collaborative events,2. Coordinate the use of information technology (e.g. website, phone app, etc.) to link businesses to visitors and their customers, and3. Develop, package, and publicize collaborative events for the region (e.g., fundraising, theme, location, advertising, participation, etc.) |
| Promote events that attract and benefit both locals and visitors | |
| “Co-Brand” to spotlight and promote the quality of “North Shore Made” products being made within the region | |
| Combine packaging of North Shore’s unique attractions (e.g., connecting environmental and recreational assets with food, festivals, culture) in different ways | |
| Build awareness of the cluster through a website that includes profiles of and a news feed about local business leaders and companies, products and services, a joint calendar, and leverages social media | |
| Infrastructure Improvements | |
| Raise awareness and support for the cluster among local residents and public officials by better communicating the cluster’s needs and ideas, leveraging the benefits that it brings to the region (e.g., beautiful landscape, tax base - attracts visitors that bring in money to the community) | Create an infrastructure planning and financing team (could be a committee within the North Shore Experience Network) to identify needs and strategies to fund infrastructure improvements to keep the North Shore an “experience” destination. The coalition would be composed of cluster employees and other businesses and partners and would provide a “joint voice” to community leaders and government members |
| Add additional Public Restrooms | |
| Create plans for improving traffic on the North Shore (e.g., additional parking, “scenic routes”, etc.) | |
| Establish a joint community space and information hub | |
| IMPLEMENTATION OUTCOMES | |
| First Steps/Early Wins | Champions |
| Branding & Marketing | |
| Establish a brand/identity that clearly states who we are, while encompassing the broad assets and distinct characteristics of the region (e.g., string of pearls). Attract the visitor who wants to stay for a few days and experience the unique characteristics of the North Shore. Capture more of existing tourist traffic. | Marty Thomas - help be a positive voice Marshall Marumoto - cultural education/marketing committee Kalani Fronda - identity (providing material re: host culture) Daniel Skaf - marketing/branding video campaign David Turner - defining the experience - values, pillars, establishing the brand Deborah Driscoll - build for residents, visitors will come Chris Gardner - targeted marketing to diverse customers i.e. swim, run, bike Bill Martin - disseminate visitor activity opportunity |
| Once an overarching brand is identified, develop communication and marketing strategy to disseminate message to broader public, policy makers, legislators, as well as other agencies (e.g., HVB) and communities (e.g., Waikiki, Oahu, Hawaii) and North Shore visitors through social media, website, etc. | Jodi Wilmott - communication between community leaders Nate Burgoyne - logo, website, social media Richard Sterman - work with Nate on website Kim Taylor Reece - brochures/Internet material, help get out to media, legislator and connect with military |
| Infrastructure Improvements | |
| Create an infrastructure, planning and finance team to work on infrastructure issues, such as Laniakea traffic. Utilize the data, brand and assets of the North Shore to speak to legislators with a joint voice. | John Morgan - traffic solutions Lee Sichter - infrastructure Charlie Texeira - local action plan that links local employment industry and orgs Kevin Kelly - North Shore economic impact |
| Create a North Shore Visitor Bureau to help manage the visitor experience. | Bill Quinlan - enlisting chamber’s help |

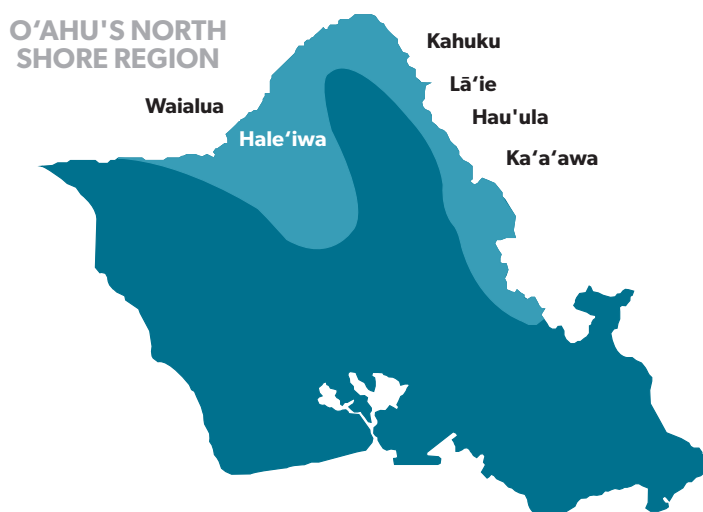
APPENDIX A: Geographic and Industry Data

National Establishment Time-Series Database

The National Establishment Time-Series Database (NETS), prepared by Walls & Associates using Dun & Bradstreet establishment data, was sourced for jobs data and establishment counts.

The North Shore Region was defined as the following zip codes:

| | |
|----------|-------|
| Hale'iwa | 96712 |
| Waialua | 96791 |
| Kahuku | 96731 |
| Lā'ie | 96762 |
| Hau'ula | 96717 |
| Ka'a'awa | 96730 |



Project Background

A coalition of individuals and organizations on the North Shore have joined together to support this project because they are committed to the vision of economic vitality in this special region. They have formed a group of project stewards who will work closely with Collaborative Economics to guide this cluster identification and strategic planning project.

The North Shore Economic Vitality Partnership includes:

Kevin Kelly - Chair
University of Hawai'i &
North Shore Community Resident

Susan Matsushima - Co-Chair
Sustainable Agriculture & Working
Landscapes
Alluvion, Inc.

Larry Jeffs - Co-Chair
Sustainable Agriculture & Working
Landscapes
The Farm/Sugarland

John Morgan - Co-Chair
North Shore Experience
Kualoa Ranch

Marty Thomas - Co-Chair
North Shore Experience
Van's Triple Crown of Surfing

Project Stewards

David Baker
Kahuku Sugar Mill

Doug Cole
North Shore Community Land Trust

Kalani Fronda
The Kamehameha Schools

Danna Holck
Turtle Bay Resort

T. Michael Moser
Windward Community College

Antya Miller
North Shore Chamber of Commerce

Kathleen M. Pahinui
Anthology Marketing Group

Lee Sichter
Lee Sichter LLC

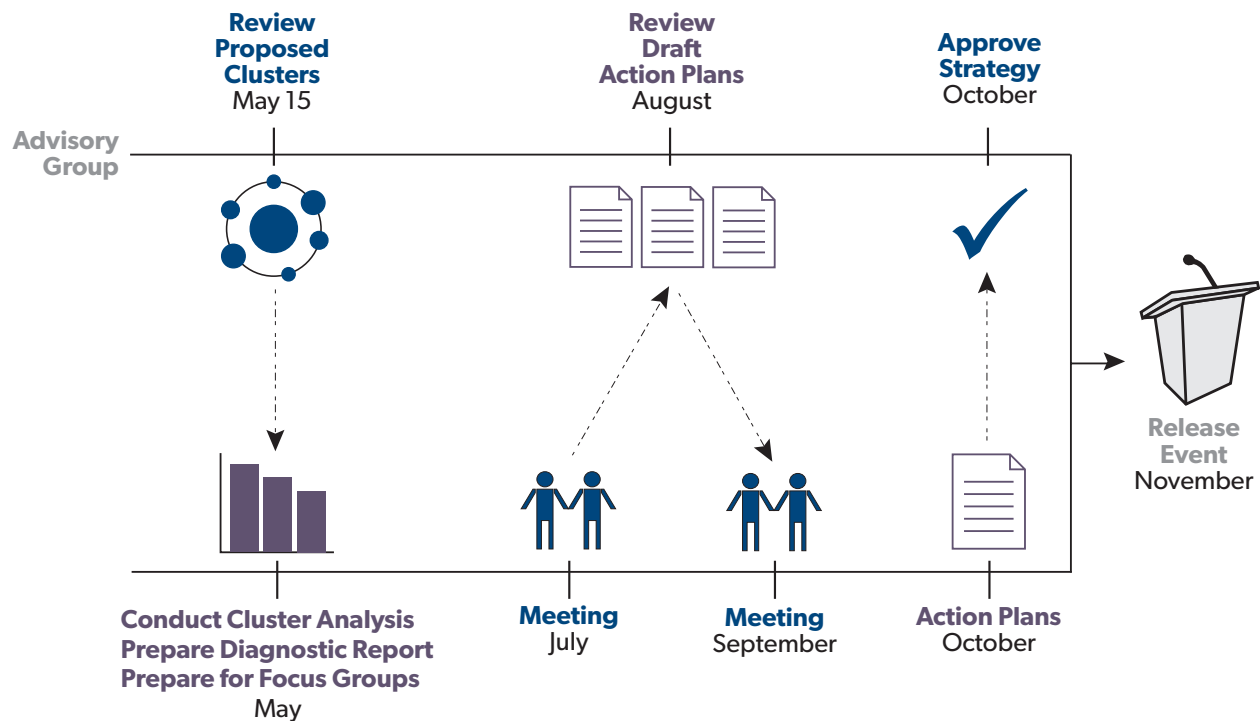
Ron Weidenbach
Hawai'i Fish Company

Carolyn Unser
First Wind

Project Overview

This North Shore Cluster Opportunities Report serves as a foundational document for the implementation of the region’s Economic Strategy Plan. A two-page document has been designed for this rollout, as well as a website that will house this document (www.northshoreevp.businesscatalyst.com). Based on feedback, the co-chairs and champions will finalize a set of actions, with specific steps, outcomes, and implementation commitments at the meeting in November. At that point, the implementation process will be launched.

Project Timeline



What are Clusters of Opportunity?

Clusters of opportunity are sectors of the economy identified by growth in one or more areas:

- **Value:** the sector brings wealth to the region
- **Jobs:** the sector has experienced strong short-term or long-term employment growth
- **Wages:** the average wages for the sector are high-value and increasing

A cluster of opportunity elaborates on the concept of an industry cluster—traditionally seen as export-oriented, geographically-concentrated, as well as shared labor pools and other specialized infrastructure—by including pathways for upward mobility for residents.

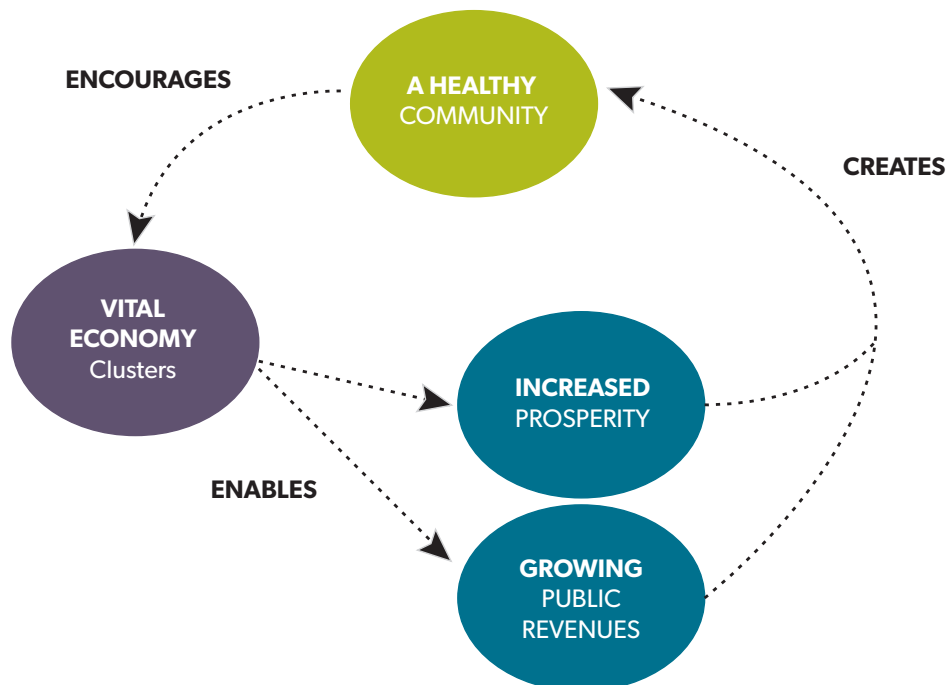
A cluster of opportunity also focuses on the size of sectors, not just their potential for rapid growth, and looks closely at population-serving activities in addition to the region's economic base. A cluster of opportunity can be export oriented, based on a regional specialization, or represent an opportunity with career advancement for local residents—or, it can combine several elements that meet economic growth and workforce investment goals.

The clusters drive economic vitality, generating jobs and wages for residents and expanding purchases of products and services from local suppliers, all resulting in a positive ripple effect to create benefits for every community in the region. The clusters also generate tax revenues that fuel local public services and support a better quality of life for local residents. The clusters, if innovative, competitive, and healthy, will drive the economic prosperity of the North Shore. For these reasons, clusters of opportunity provide the logical starting point for an Economic Strategy for the region.

Clusters of Opportunity



A Prosperous Economy Drives the Vital Cycle



APPENDIX B:

The Professional & Technical Services Cluster and the Rest of the Economy

The Professional & Technical Services Cluster

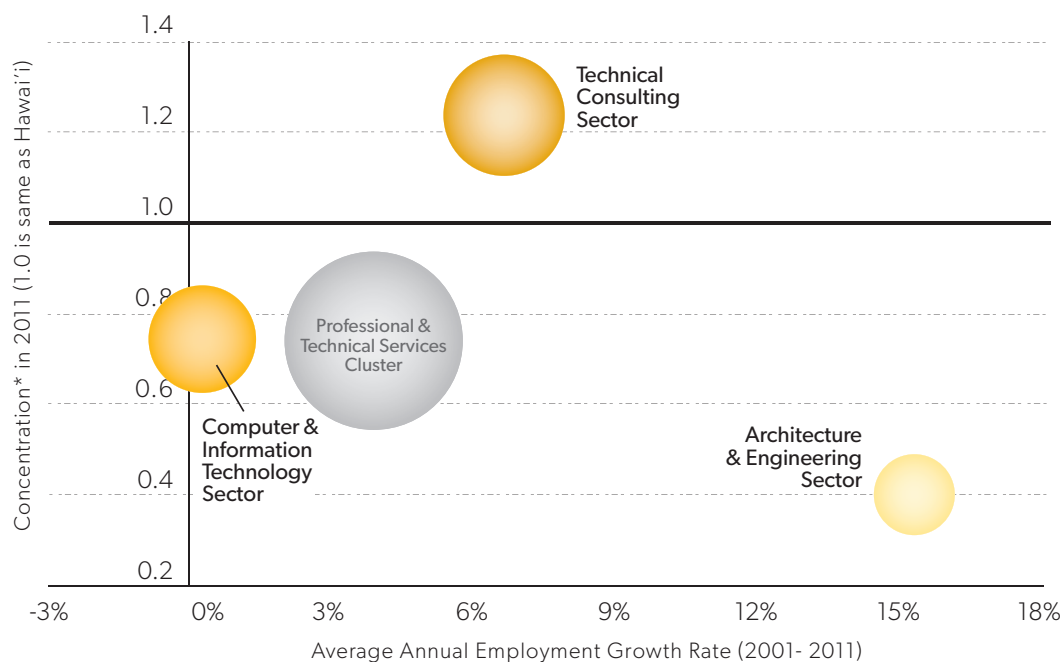
Another thriving but currently small North Shore cluster involves Professional & Technical Services. The businesses within this cluster are usually very small, 43 of the cluster’s 98 establishments are individual proprietorships. Many people move or retire to the North Shore for the location and lifestyle. Oftentimes these individuals are highly educated with a specific set of skills, and due to technology, they can work from nearly anywhere in the world. They are often “high earners”, contributing to the North Shore’s tax base and economy while having a very small footprint on the land. In addition, this cluster offers opportunities for North Shore kama‘ainas (natives) who wish to stay and work locally. Professions within this cluster, such as data/image processing or software development, can allow people to earn an income without any additional commuting or building development. Also included in this cluster is architecture and engineering services.

While Professional & Technical Services is the least concentrated (0.74) of the clusters when compared to Hawai‘i as a whole, its average annual growth rate (3.9%) is significantly higher than the rest of the economy (1.2%) (Figure 3). This growth is mostly attributed to Architecture & Engineering industries, which experienced an average annual growth rate of 15 percent between 2001 and 2011 (Figure 6). Technical Consulting is the largest industry within Professional & Technical Services, accounting for 44 percent of the cluster, and is also the only industry within the cluster with a concentration higher than the state average (1.2). The slow average annual growth rate (0.3%) of the cluster’s second largest industry, Computers & Information Technology, presents a potential problem for the success of the Professional & Technical Services cluster. Computers & Information Technology enable both Architecture & Engineering and Technical Consulting to be worldwide industries, if the proper infrastructure is not in place, the Professional & Technical Services Cluster will not be able to succeed on the North Shore.

Figure 6

Major Sectors of the Professional & Technical Services Cluster

North Shore Region, 2001-2011



*Concentration is calculated as (Northshore Cluster Emp/Northshore Total Emp)/(Hawai'i Cluster Emp/Hawai'i Total Emp)

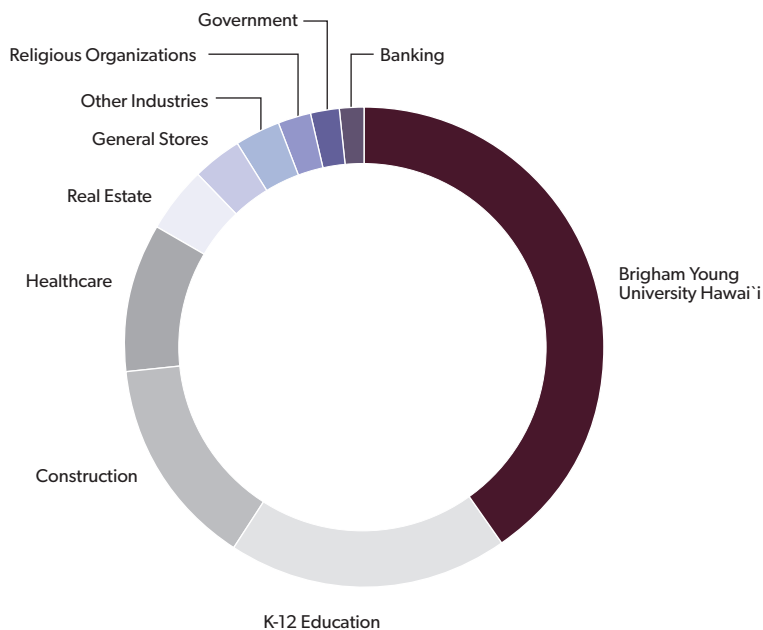
Data Source: National Establishment Time-Series Database (NETS)

Analysis: Collaborative Economics

The Rest of the Economy

The rest of the economy is largely comprised of non-export oriented industries. This includes education, healthcare, construction, government, real estate, banking and religious organizations (Figure 7). **While these industries are often the foundation of regional economies, they are not the basis for clusters of opportunity, which focus on regional specializations and export-oriented industries.** Brigham Young University, Hawai'i (BYUH) has a large presence on the North Shore and represents 19 percent of employment in the region. This segment of the economy is located in the rest of the economy bubble as a large portion of education. BYUH has grown significantly over the past decade, growing at an annual average rate of 8.9 percent between 2001 and 2011. It is also highly concentrated (7.6) when compared to other universities throughout the state. Understanding the dynamics of this institution could be critical to developing the clusters of opportunity in the future if students stay on the North Shore to either start businesses or participate in the export-oriented industries.

Figure 7
Rest of the Economy
North Shore Region



Data Source: National Establishment Time-Series Database (NETS)
Analysis: Collaborative Economics

APPENDIX C: North Shore Clusters by Industry

Sustainable Agriculture & Working Landscapes

| | | |
|---------------------------------|--------|--|
| Retail Consumption | 311811 | Retail Bakeries |
| | 424410 | General Line Grocery Merchant Wholesalers |
| | 424440 | Poultry and Poultry Product Merchant Wholesalers |
| | 424460 | Fish and Seafood Merchant Wholesalers |
| | 424480 | Fresh Fruit and Vegetable Merchant Wholesalers |
| | 424490 | Other Grocery and Related Products Merchant Wholesalers |
| | 424590 | Other Farm Product Raw Material Merchant Wholesalers |
| | 424930 | Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers |
| | 445110 | Supermarkets and Other Grocery (except Convenience) Stores |
| | 445220 | Fish and Seafood Markets |
| | 445299 | All Other Specialty Food Stores |
| | 445310 | Beer, Wine, and Liquor Stores |
| | 446191 | Food (Health) Supplement Stores |
| | 453110 | Florists |
| | 722320 | Caterers |
| | * | Specialty Restaurants |
| Conservation & Land Development | 237210 | Land Subdivision |
| | 237310 | Highway, Street, and Bridge Construction |
| | 541110 | Offices of Lawyers |
| | 541720 | Research and Development in the Social Sciences and Humanities |
| | 813211 | Grantmaking Foundations |
| | 813312 | Environment, Conservation and Wildlife Organizations |
| | 813319 | Other Social Advocacy Organizations |
| | 813410 | Civic and Social Organizations |
| | 924110 | Administration of Air and Water Resource and Solid Waste Management Programs |
| | 924120 | Administration of Conservation Programs |
| | 925120 | Administration of Urban Planning and Community and Rural Development |
| Farming | 111150 | Corn Farming |
| | 111219 | Other Vegetable (except Potato) and Melon Farming |
| | 111320 | Citrus (except Orange) Groves |
| | 111336 | Fruit and Tree Nut Combination Farming |
| | 111339 | Other Noncitrus Fruit Farming |
| | 111421 | Nursery and Tree Production |
| | 111422 | Floriculture Production |
| | 111998 | All Other Miscellaneous Crop Farming |
| | 112111 | Beef Cattle Ranching and Farming |
| | 112340 | Poultry Hatcheries |
| | 112511 | Finfish Farming and Fish Hatcheries |
| | 112519 | Other Aquaculture |
| | 112990 | All Other Animal Production |

* Specialty Restaurants are from NAICS codes 722110 (Full-Service Restaurants) and 722211 (Limited-Service Restaurants) and include restaurants on the North Shore that either embody the Hawaiian experience or make the effort to source their food locally.

Sustainable Agriculture & Working Landscapes (cont.)

| | | |
|----------------------|--------|--|
| Film | 334612 | Prerecorded Compact Disc (except Software), Tape, and Record Reproducing |
| | 512110 | Motion Picture and Video Production |
| | 512120 | Motion Picture and Video Distribution |
| | 512210 | Record Production |
| | 532230 | Video Tape and Disc Rental |
| Agricultural Support | 115112 | Soil Preparation, Planting, and Cultivating |
| | 115114 | Postharvest Crop Activities (except Cotton Ginning) |
| | 115116 | Farm Management Services |
| | 115210 | Support Activities for Animal Production |
| | 423820 | Farm and Garden Machinery and Equipment Merchant Wholesalers |
| | 424910 | Farm Supplies Merchant Wholesalers |
| | 444220 | Nursery, Garden Center, and Farm Supply Stores |
| | 541940 | Veterinary Services |
| | 713930 | Marinas |
| Food Processing | 311330 | Confectionery Manufacturing from Purchased Chocolate |
| | 311411 | Frozen Fruit, Juice, and Vegetable Manufacturing |
| | 311999 | All Other Miscellaneous Food Manufacturing |

North Shore Experience

| | | |
|------------------------|--------|---|
| Amusement & Recreation | 532292 | Recreational Goods Rental |
| | 532310 | General Rental Centers |
| | 561520 | Tour Operators |
| | 711130 | Musical Groups and Artists |
| | 711510 | Independent Artists, Writers, and Performers |
| | 712110 | Museums |
| | 713990 | All Other Amusement and Recreation Industries |
| | 722213 | Snack and Nonalcoholic Beverage Bars |
| | 812112 | Beauty Salons |
| | 812113 | Nail Salons |
| Hospitality | 485310 | Taxi Service |
| | 485320 | Limousine Service |
| | 485999 | All Other Transit and Ground Passenger Transportation |
| | 487210 | Scenic and Sightseeing Transportation, Water |
| | 488119 | Other Airport Operations |
| | 488999 | All Other Support Activities for Transportation |
| | 532120 | Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing |
| | 532411 | Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing |
| | 541930 | Translation and Interpretation Services |
| | 561510 | Travel Agencies |
| | 721110 | Hotels (except Casino Hotels) and Motels |
| | 721191 | Bed-and-Breakfast Inns |
| | 721199 | All Other Traveler Accommodation |
| | 721211 | RV (Recreational Vehicle) Parks and Campgrounds |
| | 721310 | Rooming and Boarding Houses |

North Shore Experience (cont.)

| | | |
|------------------------------------|--------|---|
| Fashion & Retail | 3152 | Cut and Sew Apparel Manufacturing |
| | 315228 | Men's and Boys' Cut and Sew Other Outerwear Manufacturing |
| | 339911 | Jewelry (except Costume) Manufacturing |
| | 339914 | Costume Jewelry and Novelty Manufacturing |
| | 423940 | Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers |
| | 424320 | Men's and Boys' Clothing and Furnishings Merchant Wholesalers |
| | 424330 | Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers |
| | 424340 | Footwear Merchant Wholesalers |
| | 448110 | Men's Clothing Stores |
| | 448120 | Women's Clothing Stores |
| | 448130 | Children's and Infants' Clothing Stores |
| | 448140 | Family Clothing Stores |
| | 448190 | Other Clothing Stores |
| | 448310 | Jewelry Stores |
| | 451120 | Hobby, Toy, and Game Stores |
| | 453220 | Gift, Novelty, and Souvenir Stores |
| | 453920 | Art Dealers |
| Ocean Experience/ Surfing | 336612 | Boat Building |
| | 339920 | Sporting and Athletic Goods Manufacturing |
| | 423910 | Sporting and Recreational Goods and Supplies Merchant Wholesalers |
| | 451110 | Sporting Goods Stores |
| | 611620 | Sports and Recreation Instruction |
| | 711211 | Sports Teams and Clubs |
| | 711219 | Other Spectator Sports |
| | 711320 | Promoters of Performing Arts, Sports, and Similar Events without Facilities |
| | 713940 | Fitness and Recreational Sports Centers |
| Uniquely Hawai'i Manufacturing* | 81292 | Photofinishing |
| | 323110 | Commercial Lithographic Printing |
| | 323113 | Commercial Screen Printing |
| | 327112 | Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing |
| | 327212 | Other Pressed and Blown Glass and Glassware Manufacturing |
| | 327215 | Glass Product Manufacturing Made of Purchased Glass |
| | 332313 | Plate Work Manufacturing |
| | 339932 | Game, Toy, and Children's Vehicle Manufacturing |
| | 541922 | Commercial Photography |

*Uniquely Hawai'i Manufacturing includes all goods produced in Hawai'i, especially those relating to the Hawaiian culture such as ukuleles and surfboards.

Professional & Technical Services

| | | |
|------------------------------------|--------|---|
| Technical Consulting | 523910 | Miscellaneous Intermediation (Finance & Investment Services) |
| | 541430 | Graphic Design Services |
| | 541690 | Other Scientific and Technical Consulting Services |
| | 541710 | Research and Development in the Physical, Engineering & Life Sciences |
| | 541990 | All Other Professional, Scientific, and Technical Services |
| | 621512 | Diagnostic Imaging Centers |
| | 811219 | Other Electronic and Precision Equipment Repair and Maintenance |
| Computers & Information Technology | 334220 | Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing |
| | 443112 | Radio, Television, and Other Electronics Stores |
| | 511210 | Software Publishers |
| | 517110 | Wired Telecommunications Carriers |
| | 517212 | Wireless Telecommunications Carriers (except satellite) |
| | 517410 | Satellite Telecommunications |
| | 517910 | Other Telecommunications |
| | 518210 | Data Processing, Hosting, and Related Services |
| | 541511 | Custom Computer Programming Services |
| | 541512 | Computer Systems Design Services |
| | 541519 | Other Computer Related Services |
| | 811211 | Consumer Electronics Repair and Maintenance |
| | 811212 | Computer and Office Machine Repair and Maintenance |
| | | |
| Architecture & Engineering | 541310 | Architectural Services |
| | 541320 | Landscape Architectural Services |
| | 541330 | Engineering Services |
| | 541340 | Drafting Services |
| | 541420 | Industrial Design Services |