Socioeconomic Impacts of Tourism in Kailua and Waimānalo, Hawaiʻi

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Dan Spencer, Laura Lesar, Brian Szuster, and Dolan Eversole

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Executive Summary

This report is a contribution to the Windward O‘ahu Tourism Assessment, a collaborative effort of the City and County of Honolulu and the University of Hawai‘i Sea Grant College Program. The Windward O‘ahu Tourism Assessment is designed to determine the social, economic, and natural resource visitor impacts on Windward O‘ahu; evaluate and prioritize potential options to address priority issues; implement additional assessments for selected communities island-wide; and provide comprehensive outreach and education for impacted communities.

To obtain information necessary to “determine the social, economic, and natural resource visitor impacts on Windward O‘ahu” and “evaluate and prioritize potential options to address priority issues,” residents of, and visitor to, two of the principal communities of Windward O‘ahu—Kailua and Waimanalo—were surveyed during the second half of 2019. The results of these surveys are reported and discussed herein.

Residents of Kailua were surveyed online; residents of Waimanalo were surveyed online and via conventional mail using an identical questionnaire to facilitate comparisons of results across communities. Meanwhile, visitors to Kailua and Waimanalo were separately surveyed through onsite, intercept surveys that involved asking nonresidents to complete a self-administered questionnaire that was available in four languages.

The results revealed widespread concern about tourism among the residents of both communities. In the case of each resident survey, over 65% of respondents agreed or strongly agreed that:

- “tourism has increased traffic,”
- “tourism has increased the cost of living,”
- “tourism has destroyed the small town feel” of the city,
- “vacation rentals have reduced the availability of housing for locals,”
- “tourism has made transportation more difficult for locals,” and
- “government decisions on tourism issues tend to favor tourists over locals.”

Likewise, in the case of each resident survey, over 65% of respondents felt “worried,” “irritated,” or “outraged” by “the presence of tourists” in their community. In addition, in the case of each survey, over 69% of respondents disagreed or strongly disagreed that their city “can handle more tourists.”

Tourism has both positive and negative economic, sociocultural, and environmental impacts in any destination, necessitating measurement of the perceived net impacts of tourism on the destination. In this study, such perceptions were measured by asking respondents to indicate the extent to which they agreed or disagreed with the statement, “Tourism has brought more benefits than problems.” In the case of each resident survey, no more than 25.3% agreed or strongly agreed with this statement, but at least 43.0% of respondents disagreed or strongly disagreed with it. This suggests that the number of respondents who felt that tourism had brought more problems than benefits exceeded the number who felt that tourism had brought more benefits than problems. On the other hand, in the case of each resident survey, about 32% of respondents neither agreed nor disagreed with the statement. This suggests that a substantial proportion of
residents felt uncertain or conflicted about the net impacts of tourism on their city. Nevertheless, it is clear that widespread unhappiness about tourism exists in both communities.

In contrast to this widespread unhappiness about tourism among residents, visitors expressed broad satisfaction with their visits to the residents’ communities. The mean levels of satisfaction, on a scale from 1 to 5, in which 1 represented “extremely dissatisfied” and 5 represented “extremely satisfied,” were above the midpoint of the scale for all 10 items about which visitors were queried (e.g., “cleanliness and appearance,” “amount of traffic on roads”) and above 4.2 overall. Presumably because of these high satisfaction levels, in the case of each visitor survey most respondents were repeat visitors, over 84% reported that it was “very likely” or “likely” that they would visit the city again, and over 88% reported that it was “very likely” or “likely” that they would recommend a visit to the city to someone they knew.

The visitor surveys revealed visitor volume and expenditures to be substantial in the case of both communities. In 2019, an estimated 1.7 million persons visited Kailua and 807,000 persons visited Waimanalo. Moreover, on any given day in 2019, on average about 15,161 visitors were present in Kailua/Lanikai, and on average about 3,320 visitors were present in Waimanalo. In 2019, these visitors spent an estimated $116.2 million in Kailua and an estimated $11.6 million in Waimanalo. While these expenditures clearly contribute to the economic vitality of these communities, their perpetuation is threatened by residents’ negative attitudes toward tourism as documented above: research has shown that if a community does not support tourism, through demonstrating unwelcoming behavior toward tourists or otherwise, visitation and associated expenditures will decline. Thus, ameliorating the negative social impacts of tourism felt by residents is critical to the long-term economic vitality and sustainability of tourism in both cities.

In a study of this type, the most important recommendations that can be made are those advanced by the survey respondents themselves. In the case of both resident surveys, respondents indicated that the following should be considered top priority issues:

- effective leadership to solve problems caused by tourism,
- negative effects of tourism on the natural environment,
- amount of traffic on roads as a result of tourism,
- negative effects of tourism on cleanliness and appearance,
- level of crowding in parks and on sidewalks and beaches as a result of tourism, and
- negative effects of tourism on the overall quality of life.

Respondents to both surveys also indicated that the most highly desired solutions to tourism-related problems in their communities were:

- improve maintenance and appearance of public restrooms at beach parks,
- pass stricter laws and penalties designed to shut down unlicensed tour operators,
- strictly enforce laws designed to shut down unlicensed tour operators,
- more strictly enforce rules controlling vacation rentals, and
- more heavily fine property owners who illegally operate vacation rentals.
Civic and government leaders, in collaboration with residents, would benefit from promptly responding to these views by facilitating better management of tourism in Kailua/Lanikai and Waimanalo. This will require development of tourism management plans for these communities, initiation of visitor education programs, improved maintenance of public facilities, stricter law enforcement, and strengthened legislation and regulation. Unless these initiatives are promptly undertaken, Kailua/Lanikai and Waimanalo may start to become less attractive to residents and tourists, harming both the local economy and residents’ quality of life.

Thus, Kailua and Waimanalo each stand at a crossroads with regard to its tourism. Each can either continue with the status quo or it can proactively improve the management of its tourism such that the benefits of tourism are optimized and more equitably distributed, and its costs are minimized. If it chooses the latter, the principal stakeholders in the community will need to be identified, organized, and charged with finding innovative ways to better manage tourism.
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Introduction

In early 2019, in response to growing concerns about overcrowded facilities and inadequate infrastructure, the City and County of Honolulu contracted with the University of Hawai‘i Sea Grant College Program (hereinafter Hawai‘i Sea Grant) to better understand and evaluate the social, physical, and economic impacts of tourism on Windward O‘ahu. The project was named the “Windward O‘ahu Tourism Assessment.”

The Assessment has four goals:

- **Goal 1.** Assess social, economic, and natural resource visitor impacts for Windward O‘ahu.
- **Goal 2.** Evaluate and prioritize potential options to address priority issues.
- **Goal 3.** Implement additional assessments for selected communities island-wide.
- **Goal 4.** Provide comprehensive outreach and education for impacted communities.

This report has been prepared in fulfillment of Goal 1. Determining the “social, economic, and natural resource visitor impacts” of visitors on Windward O‘ahu is important because tourism in any community is unsustainable unless it balances sociocultural sensitivity, economic vitality, and environmental protection, which constitute the “triple bottom line” of sustainable tourism. Indeed, the United Nations World Tourism Organization (2019) defines sustainable tourism as, “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”

To progress toward sustainability, a destination must maintain the integrity of the sociocultural, economic, and environmental conditions within it. These conditions must be simultaneously considered because they are inter-related. For example, environmental protection is essential to perpetuate the attractiveness of the destination that impels the visitation and associated spending necessary for the destination’s economic vitality. This economic vitality, in turn, is essential for a destination to generate the funds necessary to finance public services, including environmental protection and visitor education and management initiatives. Sociocultural sensitivity is essential to ensure that tourism does not so degrade residents’ quality of life that they no longer welcome visitors, which could negatively impact visitation, tourist spending, and economic vitality in the destination.

To maintain the integrity of the sociocultural, economic, and environmental conditions in a destination, it is necessary to make decisions that are guided by objective and reliable information about the nature of tourism therein. In the case of Windward O‘ahu, this information was created by conducting surveys of the residents of, and visitors to, two of the principal communities in the area—Kailua and Waimanalo—in fulfillment of Objective 1 above. Residents of each community were separately surveyed to determine their attitudes and opinions about tourism in their community; visitors to each community were separately surveyed to determine their characteristics, behavior, and satisfaction with the community they were visiting. The results of these four surveys are summarized below.
After an overview of the study areas and the methods employed in the surveys, the results of the two resident surveys will be separately presented and then compared. The results of the two visitor surveys will then be separately presented and compared. Conclusions will then be drawn and recommendations advanced. A sampling of positive and negative comments about tourism in a given community that were provided by residents of, and visitors to, that community is provided in Appendices A through D. The questionnaires used in the surveys are reproduced in Appendices E through H.

**Study Areas**

Kailua is a community of 36,662 residents (U.S. Bureau of the Census, 2020a) on the northeast or “windward” coast of O‘ahu, the most heavily populated and visited island in the Hawaiian archipelago (Figure 1). It offers tourists a smaller scale and slower pace compared to the high-rise hotels and more intense atmosphere of the Waikiki tourist district. Indeed, the demand for touristic experiences in Kailua is such that commercial buses regularly transport tourists from Waikiki to Kailua for day excursions.

Kailua has a rapidly growing commercial retail center and a comfortable, bike-friendly beach town feel. It is bordered by military installations to the north and south, making it a very desirable place for many families and new residents to Hawai‘i. Much of the town’s notoriety derives from its beautiful sandy beach and turquoise offshore waters that are popular for sunbathing, swimming, wind surfing, sea kayaking, and other activities. In fact, Kailua Beach was named the Best Beach in the USA for 2019 by Dr. Stephen Leatherman, a coastal scientist and professor at Florida International University who has ranked American beaches since 1991 (Cable News Network, 2019). The town derives additional notoriety from the fact that it was the holiday residence of the First Family during the Obama Administration.

Waimanalo is a much smaller coastal community of 9,961 residents (U.S. Bureau of the Census, 2020b, 2020c) located a few miles south of Kailua (Figure 1). It offers tourists an even smaller scale and slower pace than Kailua, with a distinct “local flavor.” The town’s principal tourist attraction is its lengthy and beautiful sandy beach and offshore waters that are popular for sunbathing, beach walking, swimming, and other activities.

**Methods**

**Kailua/Lanikai Resident Survey Methods**

The study region was defined as the City of Kailua, which encompasses Lanikai, a neighborhood in Kailua. To ensure that survey respondents understood that Lanikai was to be considered within our study region, all questions in the questionnaire pertaining to the city referenced “Kailua/Lanikai” as opposed to “Kailua.” Results based on these questions likewise reference “Kailua/Lanikai” as opposed to “Kailua.”
Figure 1. Locations of communities studied
Individual residents of Kailua age 18 or older were the units of analysis. Lists of registered voters or licensed drivers were not available from state government, so a list of the physical and email addresses of 9,502 adult Kailua residents was purchased from Infogroup.com. This list represented 32.2% of the 29,464 adult residents of Kailua as estimated by the 2014-18 American Community Survey (ACS) (U.S. Bureau of the Census, 2020a), and constituted the sampling frame for the survey. The ACS is an intercensal survey of community demographics conducted by the U.S. Bureau of the Census.

On July 11, 2019, a press release from Hawai‘i Sea Grant to all local media announced that a survey would soon be conducted in Kailua, explained its importance, and encouraged the participation of those who would be randomly selected to represent the views of the community. A systematic, random sample of 5,256 residents was then drawn from the sampling frame. On July 11, 2019, these persons were sent an email message inviting them to complete an online questionnaire distributed through the Qualtrics survey platform. The questionnaire included questions on respondents’ attitudes about tourism in their community, level of contact with tourists visiting their community, dependence on the visitor industry for their livelihoods, position on a tourism-related “irritation index,” emotional attachment to their community, prioritization of tourism-related problems in the community, and perceptions of the desirability of proposed solutions to these problems. A final section included queries on respondents’ sex, age, country of birth, length of residency in Kailua/Lanikai, race/ethnicity, and income. The questionnaire is reproduced in Appendix E.

Six hundred eighty-five (13.0%) email messages bounced and 131 persons (2.5%) opted out. Beginning on July 18, 2019, nine email reminders were sent to remaining non-respondents approximately every two weeks through November 7, 2019.

A postcard reminder was sent via conventional first-class mail on August 30, 2019 to members of the designated sample whose emails had not bounced, who had not opted out, and who had not yet completed the questionnaire. One thousand one hundred seventy-three postcards were returned marked “undeliverable.” In addition, 10 persons reported via email that they were not residents of Kailua, two reported that we had the wrong email address, and three indicated that they did not want to participate. After deducting email addresses that bounced or were reported to be incorrect, returned postcards, and non-residents of Kailua, the adjusted size of the designated sample was 3,386.

Seven hundred eleven persons completed the questionnaire. However, three respondents reported that they were under age 18 and therefore ineligible for the survey. These respondents were deleted from the achieved sample, yielding an adjusted achieved sample of 708 adult respondents. This adjusted achieved sample, divided by the adjusted designated sample, yielded a response rate of 20.9%, a typical level of participation in online surveys of general populations.

To ensure that the achieved sample would be representative of the adult population of Kailua, it was necessary to bring the demographic characteristics of the achieved sample into accord with those of the adult population of Kailua as estimated by the 2014-18 ACS. To accomplish this, 134 questionnaires completed by members of over-represented demographic groups were randomly deleted, resulting in a final adjusted achieved sample of 574 respondents. These 574
respondents represent 16.9% of the adjusted designated sample. The calculation of this value and the response rate is summarized in Table 1. Randomly deleted responses will be used in other analyses that do not require a representative sample.

The last date on which a member of the adjusted achieved sample submitted a completed questionnaire was November 10, 2019. This was more than four months before the COVID-19 pandemic impelled the state on March 26, 2020 to implement a mandatory 14-day self-quarantine for all air passengers arriving in Hawai‘i from out of state, temporarily shutting down tourism in Hawai‘i.

Differences between the demographic characteristics of the modified sample and the 2014-18 ACS results for Kailua (U.S. Bureau of the Census, 2020a) are within four percentage points for each of 24 demographic parameters pertaining to sex, age, race, and household income (Table 2). For example, the ACS found that 14.8% of Kailua residents were age 65-74; the comparable value from the modified sample was 15.2%, a difference of 0.4 percentage points. The final achieved sample is considered representative of the adult population of Kailua on account of its large size and close conformity to the demographic composition of the community as documented by the ACS.

**Waimanalo Resident Survey Methods**

To permit comparisons with the results of the Kailua/Lanikai resident survey, the Waimanalo resident survey was designed and conducted in manner as similar as possible to that of the Kailua/Lanikai resident survey. In particular, the questionnaire used in the Waimanalo resident survey was identical to that used in the Kailua/Lanikai resident survey, except the word, “Kailua,” as in the phrase, “downtown Kailua,” or the words, “Kailua/Lanikai” were replaced with the word, “Waimanalo.” In addition, the questionnaire item about the desirability of making the downtown “a pedestrian mall with parking within walking distance,” as a proposed solution to traffic-related problems in the city, was omitted since this was deemed inappropriate given Waimanalo’s size. The questionnaire is reproduced in Appendix F.

The study region was defined as the City of Waimanalo. Individual residents of Waimanalo were the units of analysis. Lists of registered voters or licensed drivers were not available from state government, so a list of the physical and email addresses of 2,315 adult Waimanalo residents was purchased from Infogroup.com. This list represented 31.7% of the 7,300 adult residents of Waimanalo as estimated by the 2014-18 ACS (U.S. Bureau of the Census, 2020b, 2020c), and constituted the designated sample for the survey.

The same press release that announced the Kailua resident survey and encouraged the participation of those who would be selected to represent the views of the community also did so in the case of the Waimanalo resident survey. On July 11, 2019, all members of the designated sample were sent an email message inviting them to complete an online questionnaire distributed through the Qualtrics survey platform. Three hundred fifty-two (15.2%) email messages bounced
Table 1. Calculation of response rate and adjusted achieved sample as a percentage of adjusted designated sample for the Kailua/Lanikai resident survey.

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designated sample</td>
<td>5,256</td>
</tr>
<tr>
<td>Less emails that bounced after initial email blast</td>
<td>- 685</td>
</tr>
<tr>
<td>Less returned postcards marked “undeliverable”</td>
<td>- 1,173</td>
</tr>
<tr>
<td>Less reported non-residency in Kailua</td>
<td>- 10</td>
</tr>
<tr>
<td>Less reported bad email address</td>
<td>- 2</td>
</tr>
<tr>
<td>Equals adjusted designated sample</td>
<td>3,386</td>
</tr>
<tr>
<td>Initial achieved sample</td>
<td>711</td>
</tr>
<tr>
<td>Less respondents who reported that they were under age 18</td>
<td>- 3</td>
</tr>
<tr>
<td>Equals adjusted initial achieved sample</td>
<td>708</td>
</tr>
<tr>
<td>Response rate = (708 / 3,386) * 100</td>
<td>20.9%</td>
</tr>
<tr>
<td>Final adjusted achieved sample after random deletion of 134 respondents in over-represented demographic groups, as a percentage of adjusted designated sample = (574 / 3,386) * 100</td>
<td>16.9%</td>
</tr>
</tbody>
</table>
Table 2. Raw and modified Kailua/Lanikai resident survey results versus 2014-18 American Community Survey results on Kailua/Lanikai.

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>ACS, 2014-18</th>
<th>RAW SURVEY RESULTS (n=708)</th>
<th>MODIFIED SURVEY RESULTS (n=574)</th>
<th>PERCENTAGE POINT DIFFERENCE, SURVEY VS. ACS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sex</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>14,612</td>
<td>49.6</td>
<td>38.1</td>
<td>49.4</td>
</tr>
<tr>
<td>Female</td>
<td>14,852</td>
<td>50.4</td>
<td>61.9</td>
<td>50.6</td>
</tr>
<tr>
<td>Total adult residents</td>
<td>29,464</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 to 34 years</td>
<td>7,558</td>
<td>25.7</td>
<td>18.1</td>
<td>23.9</td>
</tr>
<tr>
<td>35 to 44 years</td>
<td>4,545</td>
<td>15.4</td>
<td>18.8</td>
<td>15.0</td>
</tr>
<tr>
<td>45 to 54 years</td>
<td>4,708</td>
<td>16.0</td>
<td>17.3</td>
<td>18.8</td>
</tr>
<tr>
<td>55 to 59 years</td>
<td>2,625</td>
<td>9.0</td>
<td>10.2</td>
<td>10.4</td>
</tr>
<tr>
<td>60 to 64 years</td>
<td>2,726</td>
<td>9.3</td>
<td>10.8</td>
<td>8.5</td>
</tr>
<tr>
<td>65 to 74 years</td>
<td>4,346</td>
<td>14.8</td>
<td>18.6</td>
<td>15.2</td>
</tr>
<tr>
<td>75 to 84 years</td>
<td>1,984</td>
<td>6.7</td>
<td>5.5</td>
<td>7.2</td>
</tr>
<tr>
<td>85 years and over</td>
<td>972</td>
<td>3.3</td>
<td>0.7</td>
<td>1.0</td>
</tr>
<tr>
<td>Total adult residents</td>
<td>29,464</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Race</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White alone</td>
<td>17,361</td>
<td>47.4</td>
<td>45.2</td>
<td>44.3</td>
</tr>
<tr>
<td>Black or African American alone</td>
<td>330</td>
<td>0.9</td>
<td>0.2</td>
<td>0.2</td>
</tr>
<tr>
<td>American Indian and Alaska Native alone</td>
<td>60</td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
</tr>
<tr>
<td>Asian alone</td>
<td>6,690</td>
<td>18.2</td>
<td>15.8</td>
<td>18.6</td>
</tr>
<tr>
<td>Other</td>
<td>12,221</td>
<td>33.3</td>
<td>38.6</td>
<td>36.7</td>
</tr>
<tr>
<td>Total residents</td>
<td>36,662</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Real Household Income, 2018</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $15,000</td>
<td>591</td>
<td>4.8</td>
<td>1.5</td>
<td>2.0</td>
</tr>
<tr>
<td>$15,000 to $24,999</td>
<td>446</td>
<td>3.6</td>
<td>5.0</td>
<td>4.7</td>
</tr>
<tr>
<td>$25,000 to $34,999</td>
<td>586</td>
<td>4.7</td>
<td>5.4</td>
<td>4.5</td>
</tr>
<tr>
<td>$35,000 to $49,999</td>
<td>920</td>
<td>7.4</td>
<td>9.9</td>
<td>7.7</td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>1,579</td>
<td>12.7</td>
<td>16.5</td>
<td>12.9</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>1,397</td>
<td>11.2</td>
<td>14.7</td>
<td>14.1</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>2,624</td>
<td>21.1</td>
<td>21.7</td>
<td>21.0</td>
</tr>
<tr>
<td>$150,000 to $199,999</td>
<td>1,720</td>
<td>13.8</td>
<td>12.6</td>
<td>16.3</td>
</tr>
<tr>
<td>$200,000 or more</td>
<td>2,573</td>
<td>20.7</td>
<td>12.6</td>
<td>16.8</td>
</tr>
<tr>
<td>Total households</td>
<td>12,436</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

NOTE: "ACS" means American Community Survey, an intercensal survey of community demographics conducted by the U.S. Bureau of the Census.
and 39 persons (1.7%) opted out. Beginning on July 18, 2019, 13 email reminders were sent to remaining non-respondents approximately every two weeks through January 2, 2020.

A postcard reminder was sent via conventional first-class mail on August 26, 2019 to members of the designated sample whose emails had not bounced, who had not opted out, and who had not yet completed the questionnaire. Three hundred six postcards were returned marked “undeliverable.” In addition, 11 persons reported via email that they were not residents of Waimanalo and one indicated that she did not want to participate. After deducting email addresses that bounced, returned postcards, and non-residents of Waimanalo, the adjusted size of the designated sample was 1,646.

Two hundred eighty-two persons completed the online questionnaire. However, two respondents reported that they were under age 18. These respondents were deleted from the achieved online sample, yielding an adjusted achieved online sample of 280 adult respondents. This adjusted achieved online sample, divided by the adjusted designated sample, yielded a response rate of 17.0%, a typical level of participation in online surveys of general populations.

To ensure sufficient cases for both estimation of population parameters and detailed analyses, a follow-up conventional mail survey of non-respondents to the online survey of Waimanalo residents was conducted. Questionnaires with cover letters and consent forms were mailed on October 18, 2019 to the 1,744 members of the designated sample who were known at that time to be non-respondents with viable physical addresses. This was followed by a reminder postcard sent on October 25, 2019. One hundred seventy-eight completed questionnaires were returned. However, three of these questionnaires were completed by persons under age 18 and two were completed by persons who had already completed the online questionnaire. Removing these five persons from the data base yielded 173 viable, completed mail survey questionnaires, for a response rate of 9.9%. Respondents to either the online or conventional mail surveys totaled 453 residents, for an aggregate response rate of 27.5%.

To ensure that the achieved sample would be representative of the adult population of Waimanalo, it was necessary to bring the demographic characteristics of the sample into accord with those of the adult population of Waimanalo as estimated by the 2014-18 ACS (U.S. Bureau of the Census, 2020b, 2020c). To accomplish this, 152 questionnaires completed by members of over-represented demographic groups were randomly deleted, resulting in a final adjusted achieved sample of 301 respondents. These 301 respondents represent 18.3% of the adjusted designated sample. The calculation of this value and the aggregate response rate is summarized in Table 3. Randomly deleted responses will be used in other analyses that do not require a representative sample.

All online and conventional mail data collection was completed by January 14, 2020. This was more than 10 weeks before the COVID-19 pandemic impelled the state on March 26, 2020 to implement a mandatory 14-day self-quarantine for all air passengers arriving in Hawai‘i from out of state, temporarily shutting down tourism in Hawai‘i.

Differences between the demographic characteristics of the modified sample and the 2014-18 ACS results for Waimanalo (U.S. Bureau of the Census, 2020b, 2020c) are within 8.4 percentage points for each of 24 demographic parameters pertaining to sex, age, race, and household income.
Table 3. Calculation of response rate and adjusted achieved sample as a percentage of adjusted designated sample for the Waimanalo resident survey.

<table>
<thead>
<tr>
<th>ONLINE SURVEY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designated sample</td>
</tr>
<tr>
<td>Less emails that bounced after initial email blast</td>
</tr>
<tr>
<td>Less returned postcards marked “undeliverable”</td>
</tr>
<tr>
<td>Less reported non-residency in Waimanalo</td>
</tr>
<tr>
<td>Equals adjusted designated sample</td>
</tr>
<tr>
<td>Initial achieved sample</td>
</tr>
<tr>
<td>Less respondents who reported that they were under age 18</td>
</tr>
<tr>
<td>Equals adjusted initial achieved sample</td>
</tr>
<tr>
<td>Online survey response rate = (280 / 1,646) * 100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FOLLOW-UP MAIL SURVEY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number addressees (non-respondents with viable physical addresses)</td>
</tr>
<tr>
<td>Number of completed questionnaires returned</td>
</tr>
<tr>
<td>Less questionnaires completed by persons under age 18</td>
</tr>
<tr>
<td>Less questionnaires completed by persons who had completed the online questionnaire</td>
</tr>
<tr>
<td>Equals viable, completed questionnaires received</td>
</tr>
<tr>
<td>Mail survey response rate = (173 / 1,744) * 100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COMBINED ONLINE AND MAIL SURVEYS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viable respondents to online or mail surveys = 280 + 173</td>
</tr>
<tr>
<td>Aggregate response rate = (453 / 1,646) * 100</td>
</tr>
<tr>
<td>Final adjusted achieved sample after random deletion of 152 respondents in over-represented demographic groups, as a percentage of adjusted designated sample = (301 / 1,646) * 100</td>
</tr>
</tbody>
</table>
(Table 4). For example, the ACS found that 29.5% of Waimanalo residents were age 18-34; the comparable value from the modified sample was 27.4%, a difference of 2.1 percentage points. The final achieved sample is considered representative of the adult population of Waimanalo on account of its large size relative to the population from which it was drawn, and its close conformity to the demographic composition of the community as documented by the ACS.

**Kailua/Lanikai Visitor Survey Methods**

Data on visitors to Kailua were obtained from an on-site intercept survey of visitors conducted in Kailua during the summer of 2019. The definitions and methods employed in the execution of this survey are described below.

**Definitions**

The study region was defined as the City of Kailua, which encompasses Lanikai, a neighborhood in Kailua (Figure 1). All visitors to Kailua/Lanikai age 18 or older were eligible to participate in the survey. Visitors were defined as persons age 18 or older who did not reside in Kailua/Lanikai, including residents of other communities on O‘ahu. This broad definition of a “visitor” was adopted since all nonresidents, including those who live elsewhere on O‘ahu, can positively and/or negatively impact the community.

**Questionnaire**

Data collection involved surveyors asking visitors to complete a self-administered questionnaire. The questionnaire included sections on: (1) respondents’ personal characteristics, including their age and the zip code of their residence; (2) the size and composition of their travel party; (3) sources of information about Kailua/Lanikai that were used in planning their visits; (4) the purpose(s) of their trips; (5) whether they had previously visited Kailua/Lanikai; (6) mode(s) of transportation to Kailua/Lanikai; (7) length of stay in the community; (8) types of lodging used in Kailua/Lanikai, if any; (9) participation in various types of recreation; (10) expenditures in Kailua/Lanikai; (11) the likelihood of returning to Kailua/Lanikai and/or recommending it to others; and (12) levels of satisfaction with various aspects of the community.

As with the Kailua/Lanikai resident survey, to ensure that survey respondents understood that Lanikai was to be considered within our study region, all questions in the questionnaire pertaining to the city referenced “Kailua/Lanikai” as opposed to “Kailua.” Results based on these questions likewise reference “Kailua/Lanikai” as opposed to “Kailua.”

Since China, Japan, and Korea are major origin markets for O‘ahu, the questionnaire was translated by a professional translation company into Japanese, Korean, and simplified Chinese so that speakers of these languages would be able to participate in the survey. Certified
### Table 4. Raw and modified Waimanalo resident survey results versus 2014-18 American Community Survey results on Waimanalo and Waimanalo Beach CDPs.

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>WAIMANALO AND WAIMANALO BEACH CDPS, COMBINED, FROM THE ACS, 2014-18</th>
<th>RAW SURVEY RESULTS (n=453)</th>
<th>MODIFIED SURVEY RESULTS (n=301)</th>
<th>PERCENTAGE POINT DIFFERENCE, SURVEY VS. ACS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sex</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>N (adult residents) 3,444 47.2 Pct.</td>
<td>35.4 46.9 Pct.</td>
<td>-11.8 0.3 Pct.</td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>N (adult residents) 3,856 52.8 Pct.</td>
<td>64.6 53.1 Pct.</td>
<td>11.8 0.3 Pct.</td>
<td></td>
</tr>
<tr>
<td><strong>Total adult residents</strong></td>
<td>N (adult residents) 7,300 100.0 Pct.</td>
<td>100.0 100.0 Pct.</td>
<td>0.0 0.0 Pct.</td>
<td></td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 to 34 years</td>
<td>N (adult residents) 2,156 29.5 Pct.</td>
<td>27.4 Pct.</td>
<td>-11.6 Pct.</td>
<td>-2.1 Pct.</td>
</tr>
<tr>
<td>35 to 44 years</td>
<td>N (adult residents) 1,189 16.3 Pct.</td>
<td>19.2 Pct.</td>
<td>0.0 Pct.</td>
<td>2.9 Pct.</td>
</tr>
<tr>
<td>45 to 54 years</td>
<td>N (adult residents) 1,333 18.3 Pct.</td>
<td>16.0 Pct.</td>
<td>6.6 Pct.</td>
<td>-2.3 Pct.</td>
</tr>
<tr>
<td>55 to 59 years</td>
<td>N (adult residents) 608 8.3 Pct.</td>
<td>8.2 Pct.</td>
<td>2.3 Pct.</td>
<td>-0.1 Pct.</td>
</tr>
<tr>
<td>60 to 64 years</td>
<td>N (adult residents) 446 6.1 Pct.</td>
<td>9.1 Pct.</td>
<td>4.2 Pct.</td>
<td>3.0 Pct.</td>
</tr>
<tr>
<td>65 to 74 years</td>
<td>N (adult residents) 888 12.2 Pct.</td>
<td>11.0 Pct.</td>
<td>-1.1 Pct.</td>
<td>-1.2 Pct.</td>
</tr>
<tr>
<td>75 to 84 years</td>
<td>N (adult residents) 532 7.3 Pct.</td>
<td>8.7 Pct.</td>
<td>0.8 Pct.</td>
<td>1.4 Pct.</td>
</tr>
<tr>
<td>85 years and over</td>
<td>N (adult residents) 148 2.0 Pct.</td>
<td>0.5 Pct.</td>
<td>-1.2 Pct.</td>
<td>-1.5 Pct.</td>
</tr>
<tr>
<td><strong>Total adult residents</strong></td>
<td>N (adult residents) 7,300 100.0 Pct.</td>
<td>100.0 Pct.</td>
<td>0.0 Pct.</td>
<td></td>
</tr>
<tr>
<td><strong>Race</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White alone</td>
<td>N (all residents) 945 9.5 Pct.</td>
<td>14.0 Pct.</td>
<td>0.1 Pct.</td>
<td>4.5 Pct.</td>
</tr>
<tr>
<td>Black or African American alone</td>
<td>N (all residents) 53 0.5 Pct.</td>
<td>0.0 Pct.</td>
<td>-0.5 Pct.</td>
<td>-0.5 Pct.</td>
</tr>
<tr>
<td>American Indian and Alaska Native alone</td>
<td>N (all residents) 6 0.1 Pct.</td>
<td>0.0 Pct.</td>
<td>0.7 Pct.</td>
<td>-0.1 Pct.</td>
</tr>
<tr>
<td>Asian alone</td>
<td>N (all residents) 1,496 15.0 Pct.</td>
<td>12.2 Pct.</td>
<td>-7.8 Pct.</td>
<td>-2.8 Pct.</td>
</tr>
<tr>
<td>Other</td>
<td>N (all residents) 7,461 74.9 Pct.</td>
<td>73.9 Pct.</td>
<td>7.5 Pct.</td>
<td>-1.0 Pct.</td>
</tr>
<tr>
<td><strong>Total residents</strong></td>
<td>N (all residents) 9,961 100.0 Pct.</td>
<td>100.0 Pct.</td>
<td>0.0 Pct.</td>
<td></td>
</tr>
<tr>
<td><strong>Real Household Income, 2018</strong></td>
<td>N (Households)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $15,000</td>
<td>N (Households) 145 6.2 Pct.</td>
<td>5.7 Pct.</td>
<td>5.3 Pct.</td>
<td>-0.5 Pct.</td>
</tr>
<tr>
<td>$15,000 to $24,999</td>
<td>N (Households) 160 6.8 Pct.</td>
<td>6.6 Pct.</td>
<td>4.7 Pct.</td>
<td>-0.2 Pct.</td>
</tr>
<tr>
<td>$25,000 to $34,999</td>
<td>N (Households) 114 4.8 Pct.</td>
<td>5.2 Pct.</td>
<td>6.2 Pct.</td>
<td>0.4 Pct.</td>
</tr>
<tr>
<td>$35,000 to $49,999</td>
<td>N (Households) 226 9.6 Pct.</td>
<td>8.5 Pct.</td>
<td>2.2 Pct.</td>
<td>-1.1 Pct.</td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>N (Households) 393 16.7 Pct.</td>
<td>25.1 Pct.</td>
<td>3.8 Pct.</td>
<td>8.4 Pct.</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>N (Households) 294 12.5 Pct.</td>
<td>17.1 Pct.</td>
<td>1.8 Pct.</td>
<td>4.6 Pct.</td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>N (Households) 489 20.8 Pct.</td>
<td>19.0 Pct.</td>
<td>-9.3 Pct.</td>
<td>-1.8 Pct.</td>
</tr>
<tr>
<td>$150,000 to $199,999</td>
<td>N (Households) 260 11.1 Pct.</td>
<td>6.6 Pct.</td>
<td>-6.9 Pct.</td>
<td>-4.5 Pct.</td>
</tr>
<tr>
<td>$200,000 or more</td>
<td>N (Households) 271 11.5 Pct.</td>
<td>6.2 Pct.</td>
<td>-7.8 Pct.</td>
<td>-5.3 Pct.</td>
</tr>
<tr>
<td><strong>Total households</strong></td>
<td>N (Households) 2,352 100.0 Pct.</td>
<td>100.0 Pct.</td>
<td>0.0 Pct.</td>
<td></td>
</tr>
</tbody>
</table>

NOTE: "ACS" means American Community Survey, an intercensal survey of community demographics conducted by the U.S. Bureau of the Census.
proofreading of these translations was subsequently accomplished by a second professional translation company. The English version of the questionnaire is reproduced in Appendix G.

**Data Collection**

Data were collected on Kailua Beach, Lanikai Beach, and near Kalapawi Market and Whole Foods, in the commercial district of Kailua where visitors tend to congregate. Most surveying occurred at Kailua Beach and Lanikai Beach.

Surveying occurred over a three-week period and on each day of the week to capture possible variations in the times during which different types of visitors visited the community. Specifically, surveying took place on Friday, July 12; Sunday, July 14; Monday, July 22; Wednesday, July 24; Thursday, July 25; Tuesday, July 30; and Saturday, August 3.

Six University of Hawai‘i at Manoa (UHM) graduate and undergraduate students were hired and trained to serve as surveyors. They wore identification tags bearing the UHM logo and their names, followed by the phrase, “University of Hawai‘i Survey Team.”

On each survey day, a “headquarters” in the middle of the area to be surveyed was set up to provide a place for a project supervisor to coordinate the work and for surveyors to drop off completed questionnaires and replenish their supply of blank questionnaires. The area to be surveyed was divided into three or four zones depending on the number of surveyors on duty that day. A surveyor or pair of surveyors was assigned to each zone and tasked with randomly approaching people within it. Surveyors carried a supply of questionnaires in all four languages and numerous, pre-loaded clipboards with an information sheet, questionnaire, and pen to permit them to administer as many questionnaires as possible without having to return to the survey headquarters.

Surveyors were instructed to randomly approach people regardless of their gender, ethnicity, or apparent age, ask if they were from out of town, and, if they answered in the affirmative, invite them to participate in the survey. If a given visitor agreed to participate, he/she was provided with a pre-loaded clipboard containing a blank questionnaire and pen. The surveyor then returned to the respondent after about 20 minutes to retrieve the completed questionnaire. If the visitor declined to participate, this was recorded on a “Non-Participation Tally Sheet.”

If a cooperating visitor did not speak English, the surveyor showed him/her an information card written in Chinese, Japanese, and Korean that explained the project and invited participation. This enabled the surveyor to determine which language the visitor spoke and provide her/him with the appropriate translation of the questionnaire. Visitors were asked to complete the questionnaire in their first language. Visitors whose language was other than English, Chinese, Japanese, or Korean were asked if they could read any of the four languages available. If not, the visitor was thanked and this non-participation due to language barrier was tallied on a “Non-Participation Tally Sheet.”
At the end of each survey day, non-responses due to language barriers or refusals were provided to the project supervisor, who tallied the daily responses and then aggregated them across all survey days. The resulting totals revealed that 781 visitors were invited to participate in the survey. Of these, 551 participated, 213 refused to participate, five returned blank questionnaires, and 12 were unable to participate due to a language barrier. Classifying the five visitors who returned blank questionnaires as de facto refusals, the response rate was therefore \((551 \div 781) \times 100\) or 70.5%. Of the 551 respondents, the English questionnaire was completed by 522 (94.7%) respondents, the Japanese questionnaire was completed by 26 (4.7%) respondents, the Chinese questionnaire was completed by two (0.4%) respondents, and the Korean questionnaire was completed by one (0.2%) respondent.

**Data Entry, Processing, and Analysis**

Foreign language responses to open-ended questions were translated into English by native speakers of the various foreign languages. All questionnaire responses were then entered into data bases by undergraduate and graduate students trained in data entry by a project supervisor. The unit of analysis was the visitor. Data were analyzed using IBM SPSS Version 26.

**Waimanalo Visitor Survey Methods**

To permit comparisons with the results of the Kailua/Lanikai visitor survey, the Waimanalo visitor survey was designed and conducted in manner as similar as possible to that of the Kailua/Lanikai visitor survey. Thus, like the Kailua/Lanikai visitor survey, data on visitors to Waimanalo were obtained from an on-site intercept survey of visitors conducted in Waimanalo during the summer of 2019 that involved surveyors asking visitors to complete a self-administered questionnaire. This questionnaire was identical to that used in the Kailua/Lanikai visitor survey, except the word, “Kailua,” as in the phrase, “downtown Kailua,” or the words, “Kailua/Lanikai” were replaced with “Waimanalo,” and a question that queried respondents about where they parked during their visits omitted “parking garage” as a response option since no parking garage exists in Waimanalo. As in the Kailua visitor survey, the questionnaire was translated by a professional translation company into Japanese, Korean, and simplified Chinese so that speakers of these languages would be able to participate in the survey. Certified proofreading of these translations was subsequently accomplished by a second professional translation company. The English version of the questionnaire is reproduced in Appendix H.

**Definitions**

The study region was defined as the City of Waimanalo (Figure 1). As with the Kailua/Lanikai visitor survey, all visitors to Waimanalo age 18 or older were eligible to participate in the survey, and visitors were defined as persons age 18 or older who did not reside in Waimanalo, including residents of other communities on O‘ahu.
Data Collection

Data were collected on the stretch of beach from Waimanalo Beach Park on the southern end of the town to the beginning of Bellows Beach on the northern end of the town. This area includes the shoreline commonly known to O‘ahu residents as “Sherwood Beach.” Surveying occurred over a three-week period and on each day of the week to capture possible variations in the times during which different types of visitors visited the community. Specifically, surveying took place on Wednesday, July 10; Saturday, July 13; Tuesday, July 16; Thursday July 18; Friday July 19; Sunday, July 21; and Monday, July 29.

Data collection procedures were identical to those employed in the Kailua visitor survey described above, except for differences in the specific places and days in which data were collected. Six hundred sixty-four visitors were invited to participate in the survey. Of these, 436 participated, 223 refused to participate, one returned a blank questionnaire, and four were unable to participate due to a language barrier. Classifying the visitor who returned a blank questionnaires as a de facto refusal, the response rate was therefore (436 / 664) x 100 or 65.7%. Of the 436 respondents, the English questionnaire was completed by 433 (99.3%) respondents, the Japanese questionnaire was completed by two (0.5%) respondents, and the Korean questionnaire was completed by one (0.2%) respondent. No one completed the Chinese questionnaire. Data entry, processing, and analysis procedures were identical to those employed in the Kailua/Lanikai visitor survey.

Results

Findings from the Kailua/Lanikai resident survey, followed by findings from the Waimanalo resident survey, are presented in this section. Findings from the Kailua/Lanikai visitor survey and the Waimanalo visitor survey are presented thereafter.

In a given figure below, “n =”, followed by a number reports the number of persons whose responses are represented in the results portrayed in the figure. As in all survey research, this value varied from one question to another due to some respondents not answering all questions in the questionnaire.

Kailua/Lanikai Resident Survey Results

Kailua/Lanikai Residents’ Demographic and Socioeconomic Characteristics

The distributions of Kailua/Lanikai residents across sex, age, race, and income categories, as measured by both the ACS and the Kailua/Lanikai resident survey, are provided in Table 2. In addition, the ages of respondents to the Kailua/Lanikai resident survey ranged from 18 to 93 and averaged 50.1. The median age was 50.0. Almost all (94.8%) respondents reported that they lived in Kailua/Lanikai for more than six months of the year, and these “full-time residents” had
lived in Kailua/Lanikai for an average of 26.5 years. Only 26.8% of respondents reported that they worked for pay in Kailua/Lanikai.

**Kailua/Lanikai Residents’ Attitudes About Tourism in Their Community**

Respondents were asked to indicate the extent to which they agreed or disagreed with 26 attitude statements about tourism in Kailua/Lanikai, on a scale from 1 to 5, in which 1 meant “strongly disagree,” 2 meant “agree,” 3 meant “neither agree nor disagree,” 4 meant “agree,” and 5 meant “strongly agree.” Mean levels of agreement with these attitude statements were highest for negatively worded statements and lowest for positively worded statements (Figures 2 and 3). In fact, the top 12 items in terms of mean level of agreement were all negatively worded and the bottom 12 items were all positively worded. Thus, respondents demonstrated high levels of agreement with the negatively worded statements about tourism in their community. As shown in Figure 2, the top five items in terms of mean level of agreement were:

- “tourism has increased traffic” (4.29),
- “tourism has increased the cost of living” (4.02),
- “tourism has destroyed the small town feel of Kailua/Lanikai” (4.02),
- “vacation rentals have reduced the availability of housing for locals” (3.99), and
- “government decisions on tourism issues tend to favor tourists over locals” (3.94).

Another way of summarizing the results of the attitude statements is to simply identify the statements with which most respondents agreed or disagreed. Widespread agreement among residents emerged in the case of many attitude statements. In particular, over 70% of respondents agreed or strongly agreed that tourism had “increased traffic,” “increased the cost of living,” “destroyed the small town feel of Kailua/Lanikai,” and “made transportation more difficult for locals.” In addition, 73.2% agreed or strongly agreed that “vacation rentals have reduced the availability of housing for locals” (Figure 4). Similarly, over 70% of respondents disagreed or strongly disagreed with the statements, “Kailua/Lanikai can handle more tourists,” “tourism has helped to preserve the natural environment in the area,” and “I support new tourism development in Kailua/Lanikai” (Figure 5).

**Perceived Net Impacts of Tourism on Kailua/Lanikai**

Tourism has both positive and negative economic, sociocultural, and environmental impacts in any destination. It is therefore important to assess perceptions of the extent to which positive impacts counterbalance negative ones, or vice versa, to obtain an indication of the perceived net impacts of tourism on the community.

An indication of respondents’ perception of such net impacts was obtained by examining their responses to the attitude statement, “Tourism has brought more benefits than problems.” Forty-three percent of respondents disagreed or strongly disagreed with this statement, whereas only 25.3% agreed or strongly agreed with it (Figure 6). This suggests that the number of respondents...
Figure 2. Attitude statements with the highest mean levels of agreement among Kailua/Lanikai residents

- Tourism has increased traffic (N) 4.29
- Tourism has increased the cost of living (N) 4.02
- Tourism has destroyed the small town feel of Kailua/Lanikai (N) 4.02
- Vacation rentals have reduced the availability of housing for... 3.99
- Government decisions on tourism issues tend to favor tourists... 3.94
- Tourism has made transportation more difficult for locals (N) 3.93
- Increased tourism would lower the overall quality of life (N) 3.83
- Tourism has made it more difficult for locals to participate in... 3.76
- Vacation rentals have reduced peace and quiet in... 3.55
- Tourism has reduced locals’ access to restaurants, shops, and... 3.51
- Tourism has benefited only a few people (N) 3.40
- Existing tourism has lowered the overall quality of life (N) 3.34

n = 574; (N) means negatively worded statement; (P) means positively worded statement

Figure 3. Attitude statements with the lowest mean levels of agreement among residents of Kailua/Lanikai

- Tourism has improved shopping, dining, and entertainment... 3.28
- Tourism has increased crime (N) 3.25
- I have no difficulty communicating with most of the tourists who... 3.07
- Tourism has created good-paying jobs (P) 2.99
- Tourism has brought more benefits than problems (P) 2.71
- More tourists will improve the local economy (P) 2.68
- Tourists are considerate of locals (P) 2.66
- Tourists respect locals’ way of life (P) 2.52
- Tourism has improved the standard of living (P) 2.43
- We should encourage more tourists to visit (P) 2.11
- Tourists have the same ideas about acceptable behavior as locals... 2.05
- I support new tourism development in Kailua/Lanikai (P) 2.03
- Tourism has helped to preserve the natural environment in the... 1.85
- Kailua/Lanikai can handle more tourists (P) 1.78

n = 574; (N) means negatively worded statement; (P) means positively worded statement
Vacation rentals have reduced peace and quiet in...
Tourism has benefited only a few people.
Tourism has improved shopping, dining, and entertainment...
Tourism has made transportation more difficult for locals.
Increased tourism would lower the overall quality of life.
Government decisions on tourism issues tend to favor tourists...
Tourism has made it more difficult for locals to participate in...
Tourism has reduced locals’ access to restaurants, shops, and...
Tourism has improved shopping, dining, and entertainment...
Tourism has benefited only a few people.
Vacation rentals have reduced peace and quiet in...

Figure 4. Majority views among Kailua/Lanikai residents: Percentage agreeing or strongly agreeing with a given statement

- Tourism has increased traffic: 85.0%
- Tourism has increased the cost of living: 73.3%
- Tourism has destroyed the small town feel of Kailua/Lanikai: 73.2%
- Vacation rentals have reduced the availability of housing for: 73.2%
- Tourism has made transportation more difficult for locals: 71.1%
- Increased tourism would lower the overall quality of life: 69.7%
- Government decisions on tourism issues tend to favor tourists: 69.5%
- Tourism has made it more difficult for locals to participate in: 64.8%
- Tourism has reduced locals’ access to restaurants, shops, and: 55.9%
- Tourism has improved shopping, dining, and entertainment: 53.8%
- Tourism has benefited only a few people: 53.0%
- Vacation rentals have reduced peace and quiet in: 52.8%

n = 574

Figure 5. Majority views among Kailua/Lanikai residents: Percentage disagreeing or strongly disagreeing with a given statement

- Kailua/Lanikai can handle more tourists: 81.5%
- Tourism has helped to preserve the natural environment in the area: 77.5%
- I support new tourism development in Kailua/Lanikai: 70.6%
- Tourists have the same ideas about acceptable behavior as locals: 69.7%
- We should encourage more tourists to visit: 66.0%
- Tourism has improved the standard of living: 57.0%

n = 574
Figure 6. Kailua/Lanikai residents’ responses to the attitude statement, “Tourism has brought more benefits than problems”
who felt that tourism had brought more problems than benefits exceeded the number who felt that tourism had brought more benefits than problems. On the other hand, nearly a third (31.7%) of respondents neither agreed nor disagreed with the statement, suggesting that a substantial proportion of residents feel uncertain or conflicted about the net impacts of tourism on Kailua/Lanikai.

**Kailua/Lanikai Residents’ Level of Contact With Tourists Visiting Their Community**

Respondents were asked to indicate the level of contact they had with tourists visiting Kailua/Lanikai on a continuum defined by the following categories: “no contact with tourists at all,” “rare, unplanned contact with tourists,” “occasional, unplanned contact with tourists,” “occasional, planned contact with tourists,” “frequent, unplanned contact with tourists,” and “frequent, deliberate contact with tourists as part of my work.” “Occasional, unplanned contact with tourists” and “frequent, unplanned contact with tourists” were the most frequent responses, with 37.9% of respondents in each category (Figure 7).

**Kailua/Lanikai Residents’ Dependence on the Visitor Industry for Their Livelihoods**

Attitudes and opinions about tourism in any host community to a certain extent are sometimes influenced by residents’ dependence on tourism for their livelihoods. To obtain an indication of this in the case of Kailua/Lanikai, respondents were asked, “Which of the following income-related situations applies to you?” and presented with the following response options: “I work for a government agency or nonprofit organization that markets Hawai‘i to prospective tourists,” “I own, operate, or work for a business that directly serves visitors to Hawai‘i (includes vacation rentals),” “I own, operate, or work for a business that supplies some goods or services to tourism-related businesses or destination marketers in Hawai‘i,” and “none of the above.” Eighty-six percent of respondents chose “none of the above.” Thus, only about 14% of Kailua/Lanikai residents depended to some extent on tourism for their livelihoods (Figure 8).

Research has shown that residents who are more economically dependent on tourism tend to view it more favorably than those who are less so (Sharpley, 2014). The fact that most residents of Kailua/Lanikai indicated no direct economic dependence on tourism to some extent may explain why they hold largely negative attitudes towards tourism in their community, as documented above.

**Kailua/Lanikai Residents’ Position on a Tourism-Related “Irritation Index”**

Residents’ attitudes toward tourism in any host community can range from warmth to hostility, and can be measured on a continuum that is often termed an “irritation index.” In this study it was measured by asking respondents, “Which of the following best describes how you feel about the presence of tourists in Kailua/Lanikai?” followed by a continuum defined by the following five categories:
Which of the following best describes how much contact you have with tourists in Kailua/Lanikai?

<table>
<thead>
<tr>
<th>No contact with tourists at all</th>
<th>Rare, unplanned contact with tourists</th>
<th>Occasional, unplanned contact with tourists</th>
<th>Frequent, unplanned contact with tourists</th>
<th>Frequent, deliberate contact with tourists as part of my work</th>
</tr>
</thead>
</table>

n = 504

Most frequent responses

Figure 7. Kailua/Lanikai residents’ perceived level of contact with tourists visiting their community

Figure 8. Kailua/Lanikai residents’ dependence on the visitor industry for their livelihoods

Responses to the Question, “Which of the following income-related situations applies to you?” (n = 438)

I work for a government agency or nonprofit organization that markets Hawaii to prospective tourists, 2.7%

I own, operate, or work for a business that directly serves visitors to Hawaii (includes vacation rentals), 4.6%

I own, operate, or work for a business that supplies some goods or services to tourism-related businesses or destination marketers in Hawaii, 6.4%

None of the above, 86.3%
1. “I’m happy with the presence of tourists. I welcome them.”
2. “I’m indifferent to the presence of tourists. They don’t concern me,”
3. “I’m worried about the presence of tourists. They are beginning to concern me,”
4. “I’m irritated by the presence of tourists. They are a problem for me,” and
5. “I’m outraged by the presence of tourists. They are a big problem for me!”

The most frequent response was “I’m worried about the presence of tourists. They are beginning to concern me” (Figure 9). Nearly thirty-seven percent of respondents chose this intermediate option. Twenty-five percent chose, “I’m irritated by the presence of tourists. They are a problem for me.” Nineteen percent chose, “I’m happy with the presence of tourists. I welcome them.” Lower percentages chose the remaining options.

When the five response categories were assigned codes from 1 to 5 in the order in which they are listed above, the mean was observed to be 2.90. Since the most frequent response and the mean response were both about 3 on the five-point continuum, it can be concluded that the prevailing attitude of Kailua/Lanikai residents toward tourists is that they are “worried about the presence of tourists,” and that tourists “are beginning to concern” them.

**Place Attachment Among Kailua/Lanikai Residents**

For many people, their community is much more than a place where they live and/or work; it’s the “home town” they love. Social scientists call this “place attachment,” and it can sometimes help explain residents’ concerns about how tourism is affecting their communities.

The level of Kailua/Lanikai residents’ attachment to their community was measured by asking respondents to indicate the extent to which they agreed or disagreed with the following statements: “I would be very sad to move away from Kailua/Lanikai,” and “I’d rather live in Kailua/Lanikai than anywhere else.” Ninety-one percent of respondents agreed or strongly agreed with the statement, “I would be very sad to move away from Kailua/Lanikai” (Figure 10), and 81% agreed or strongly agreed with the statement, “I’d rather live in Kailua/Lanikai than anywhere else,” revealing a high level of place attachment in the sample (Figure 11).

**Kailua/Lanikai Residents’ Prioritization of Tourism-Related Issues in Their Community**

To determine residents’ views about which tourism management issues should be prioritized, a widely used method for measuring service quality known as “Importance-Performance Analysis” (Martilla & James, 1977), or “IPA,” was used. The technique is premised on a recognition that some of the services provided by an organization might be delivered well but could be considered unimportant, whereas other services considered important might be considered delivered poorly; therefore, levels of importance and performance for the various services provided by an organization should be examined simultaneously. Doing so informs management of which service quality issues should be prioritized: services considered important and delivered well are placed in a “keep up the good work” category, services considered important but not delivered well are placed in a “concentrate here” category, services considered unimportant and
Which of the following best describes how you feel about the presence of tourists in Kailua/Lanikai?

<table>
<thead>
<tr>
<th>I'm happy with the presence of tourists. I welcome them.</th>
<th>I'm indifferent to the presence of tourists. They don't concern me.</th>
<th>I'm worried about the presence of tourists. They are beginning to concern me.</th>
<th>I'm irritated by the presence of tourists. They are a problem for me.</th>
<th>I'm outraged by the presence of tourists. They are a big problem for me!</th>
</tr>
</thead>
</table>

Mean: 2.90  
Standard Deviation: 1.19  
Mode: 3  
Minimum: 1  
Maximum: 5  
n: 442

Figure 9. Kailua/Lanikai residents’ position on a tourism-related “Irritation Index”

Figure 10. Kailua/Lanikai residents’ responses to the attitude statement, “I would be very sad to move away from Kailua/Lanikai.”
Figure 11. Kailua/Lanikai residents’ responses to the attitude statement, “I’d rather live in Kailua/Lanikai than anywhere else.”
delivered poorly are placed in a “low priority” category, and services considered unimportant and delivered well are placed in a “possible overkill” category.

In this application of the technique, the “services” that were prioritized were the resolution of various tourism management issues confronting Kailua/Lanikai (e.g., “amount of traffic on roads as a result of tourism”), and the community’s “performance” in resolving them was assessed in terms of how “satisfied” respondents were “with the current situation.” Specifically, respondents were asked how important or unimportant 13 tourism management issues confronting Kailua/Lanikai were to them on a scale from 1 (“not at all important”) to 5 (“extremely important”), and how satisfied or dissatisfied they were “with the current situation” with respect to each of these same issues, on a scale from 1 (“extremely dissatisfied”) to 5 (“extremely satisfied”).

The “importance” mean and the “satisfaction” mean for each issue was then computed and plotted on a graph in which the range of “importance” means was represented on a vertical axis and the range of “satisfaction” means was represented on a horizontal axis. The intersection of these axes at the “grand mean”, i.e., the average of the average scores for “importance” and the average of the average scores for “satisfaction,” created four quadrants:

- a high importance/high satisfaction quadrant labeled, “keep up the good work”;
- a high importance/low satisfaction quadrant labeled, “concentrate here”;
- a low importance/low satisfaction quadrant labeled, “low priority”; and
- a low importance/high satisfaction quadrant labeled “possible overkill”.

Each issue’s mean scores in terms of importance and satisfaction determined its placement into one of these four quadrants. For example, since “economic benefits of tourism” had an above-average mean satisfaction score of 2.85 but a below-average mean importance score of 3.15, it ended up in the “possible overkill” quadrant in the lower right corner of the graph (Figure 12).

The issues that ended up in the “concentrate here” quadrant were:

- “effective leadership to solve problems caused by tourism,”
- “negative effects of tourism on the natural environment,”
- “negative effects of tourism on cleanliness and appearance,”
- “amount of traffic on roads as a result of tourism,”
- “level of crowding in parks and on sidewalks and beaches as a result of tourism,” and
- “negative effects of tourism on the overall quality of life.”

Based on these results, these six issues should be the focus of efforts to mitigate the negative effects of tourism on Kailua/Lanikai.

“Urban sprawl caused by tourism” and “negative effects of vacation rentals” ended up in the “low priority” quadrant; “tourists’ respect for private property rights” and “having a voice in tourism-related decisions” ended up in the “keep up the good work” quadrant; and “level of crowding in shops and restaurants as a result of tourism,” “negative effects of tourism on personal safety,” and “economic benefits of tourism” ended up in the “possible overkill” quadrant. Based on these results, these issues should not be ignored, but considered less urgent than those in the “concentrate here” quadrant.
Figure 12. Kailua/Lanikai residents’ prioritization of tourism-related issues in their community

- Negative effects of tourism on the natural environment
- Effective leadership to solve problems caused by tourism
- Concentrate Here
- Possible Overkill
- Low Priority
- Keep Up the Good Work

- Economic benefits of tourism
- Negative effects of tourism on personal safety
- Tourists’ respect for private property rights
- Having a voice in tourism-related decisions

Mean Level of Importance vs. Mean Level of Satisfaction

- Amount of traffic on roads as a result of tourism
- Level of crowding in parks and on sidewalks and beaches as a result of tourism
- Economic benefits of tourism
- Negative effects of tourism on the overall quality of life

Socioeconomic Impacts of Tourism in Kailua and Waimanalo, Hawai‘i
Kailua/Lanikai Residents’ Opinions About Proposed Solutions to Tourism-Related Problems in Their Community

It is not enough to bemoan problems, or even to scientifically document them through survey research; solutions must be found for them, and these solutions must have widespread acceptance by the community in order to be feasibly implemented. Accordingly, respondents were asked to indicate the desirability of various proposed solutions to tourism-related problems in Kailua/Lanikai focused on five broad problems: traffic, safety, vacation rentals, public facilities, and congestion. Two to five proposed solutions to each of these problems were included in the succession of questionnaire items. The desirability of each solution was measured on a scale from 1 to 5, in which 1 meant “very undesirable,” 2 meant “undesirable,” 3 meant “neutral,” 4 meant “desirable,” and 5 meant “very desirable.”

As shown in Figure 13, the proposed solutions with the highest mean desirability ratings, defined as mean ratings of 4.0 or higher, were:

- “improve maintenance and cleanliness of public restrooms at beach parks” (4.46),
- “strictly enforce laws designed to shut down unlicensed tour operators” (4.37),
- “pass stricter laws and penalties designed to shut down unlicensed tour operators” (4.31),
- “more strictly enforce rules controlling vacation rentals” (4.19),
- “more heavily fine property owners who illegally operate vacation rentals” (4.15),
- “more strictly regulate vacation rentals” (4.06),
- “require all tourists renting bicycles to watch a bicycle safety video” (4.06), and
- “pass new rules to tax vacation rentals” (4.01).

All but one of the proposed solutions received a mean desirability rating above the “neutral” point of the scale. The one solution outside this pattern was “make downtown Kailua a pedestrian mall with parking within walking distance,” with a mean desirability rating of only 2.65 (Figure 14).

Waimanalo Resident Survey Results

Waimanalo Residents’ Demographic and Socioeconomic Characteristics

The distributions of Waimanalo residents across sex, age, race, and income categories, as measured by both the ACS and the Waimanalo resident survey, are provided in Table 4. In addition, the ages of respondents to the Waimanalo resident survey ranged from 18 to 85 and averaged 48.4. The median age was 47.0. Almost all (96.9%) respondents reported that they lived in Waimanalo for more than six months of the year, and these “full-time residents” had lived in Waimanalo for an average of 30.0 years. Only 18.6% of respondents reported that they worked for pay in Waimanalo.
Figure 13. Proposed solutions to tourism-related problems in Kailua/Lanikai that had the highest mean levels of desirability among residents of Kailua/Lanikai

1. Improve maintenance and cleanliness of public restrooms at beach parks
2. Strictly enforce laws designed to shut down unlicensed tour operators
3. Pass stricter laws and penalties designed to shut down unlicensed tour operators
4. More strictly enforce rules controlling vacation rentals
5. More heavily fine property owners who illegally operate vacation rentals
6. More strictly regulate vacation rentals
7. Require all tourists renting bicycles to watch a bicycle safety video
8. Pass new rules to tax vacation rentals
9. Reduce marketing of Kailua/Lanikai as a tourist destination
10. Do not allow tour buses to enter Kailua on weekends

n = 504

Figure 14. Proposed solutions to tourism-related problems in Kailua/Lanikai that had the lowest mean levels of desirability among residents of Kailua/Lanikai

1. Strictly enforce and penalize bicycling violations
2. Require all foreigners renting motor vehicles to watch a driver safety video
3. Encourage tourists to visit less congested areas on Oahu through a smart phone app that would provide real-time information on...
4. Expand the capacity of public restrooms at beach parks
5. Cap the number of nights per year that home owners can rent their properties to tourists
6. Improve the design and appearance of parking lots at beach parks
7. Create a paved bicycle/pedestrian pathway, with separate lanes for bicyclists and pedestrians
8. Expand the capacity of parking at beach parks
9. Implement an electronic “e-toll” on all rental cars and tour buses entering Kailua. (Vehicles would not have to stop to pay the toll.)
10. Make downtown Kailua a pedestrian mall with parking within walking distance

n = 504
\textit{Waimanalo Residents’ Attitudes About Tourism in Their Community}

Respondents were asked to indicate the extent to which they agreed or disagreed with 26 attitude statements about tourism in Waimanalo, on a scale from 1 to 5, in which 1 meant “strongly disagree,” 2 meant “agree,” 3 meant “neither agree nor disagree,” 4 meant “agree,” and 5 meant “strongly agree.” Mean levels of agreement with these attitude statements were generally highest for negatively worded statements and lowest for positively worded statements (Figures 15 and 16). In fact, 13 of the top 14 items in terms of mean level of agreement were all negatively worded and the bottom 12 items were all positively worded. Thus, respondents demonstrated high levels of agreement with the negatively worded statements about tourism in their community. As shown in Figure 15, the top five items in terms of mean level of agreement were:

- “tourism has increased traffic” (4.33),
- “government decisions on tourism issues tend to favor tourists over locals” (4.18),
- “vacation rentals have reduced the availability of housing for locals” (3.95),
- “tourism has made transportation more difficult for locals” (3.95), and
- “tourism has increased the cost of living” (3.92).

Another way of summarizing the results of the attitude statements is to simply identify the statements with which most respondents agreed or disagreed. Widespread agreement among residents emerged in the case of many attitude statements. In particular, two-thirds or more of respondents agreed or strongly agreed that tourism has “increased traffic,” that “government decisions on tourism issues tend to favor tourists over locals,” that “vacation rentals have reduced the availability of housing for locals,” that “tourism has made transportation more difficult for locals,” that “tourism has benefited only a few people,” and that “tourism has increased the cost of living” (Figure 17). Similarly, over two-thirds of respondents disagreed or strongly disagreed with the statements, “Waimanalo can handle more tourists,” “tourism has helped to preserve the natural environment in the area,” “I support new tourism development in Waimanalo,” and “tourists have the same ideas about acceptable behavior as locals” (Figure 18).

\textit{Perceived Net Impacts of Tourism on Waimanalo}

An indication of respondents’ perception of the extent to which the positive impacts of tourism counterbalanced the negative ones in Waimanalo, or vice versa, was obtained by examining respondents’ responses to the attitude statement, “Tourism has brought more benefits than problems.” As shown in Figure 19, 49.1% of respondents disagreed or strongly disagreed with this statement, whereas only 18.7% agreed or strongly agreed with it. This suggests that the number of respondents who felt that tourism had brought more problems than benefits exceeded the number who felt that tourism had brought more benefits than problems. On the other hand, nearly a third (32.1%) of respondents neither agreed nor disagreed with the statement, suggesting that a substantial share of residents feel uncertain or conflicted about the net impacts of tourism on Waimanalo.
Figure 15. Attitude statements with the highest mean levels of agreement among Waimanalo residents

- Tourism has increased traffic (N) 4.33
- Government decisions on tourism issues tend to favor tourists over... 4.18
- Vacation rentals have reduced the availability of housing for locals (N) 3.95
- Tourism has made transportation more difficult for locals (N) 3.95
- Tourism has increased the cost of living (N) 3.92
- Tourism has destroyed the small town feel of Waimanalo (N) 3.87
- Tourism has benefited only a few people (N) 3.79
- Increased tourism would lower the overall quality of life (N) 3.66
- Tourism has made it more difficult for locals to participate in outdoor... 3.61
- I have no difficulty communicating with most of the tourists who visit... 3.53
- Existing tourism has lowered the overall quality of life (N) 3.37
- Tourism has reduced locals’ access to restaurants, shops, and... 3.37
- Tourism has increased crime (N) 3.36
- Tourism has increased the cost of living (N) 3.34

n = 291; (N) means negatively worded statement; (P) means positively worded statement

Figure 16. Attitude statements with the lowest mean levels of agreement among residents of Waimanalo

- Tourism has brought more benefits than problems (P) 2.52
- Tourism has created good-paying jobs (P) 2.49
- More tourists will improve the local economy (P) 2.48
- Tourism has improved shopping, dining, and entertainment opportunities for locals (P) 2.44
- Tourists are considerate of locals (P) 2.40
- Tourists respect locals’ way of life (P) 2.38
- Tourism has improved the standard of living (P) 2.14
- We should encourage more tourists to visit (P) 2.13
- Tourists have the same ideas about acceptable behavior as locals (P) 2.00
- I support new tourism development in Waimanalo (P) 1.75
- Tourism has helped to preserve the natural environment in the area (P) 1.71
- Waimanalo can handle more tourists (P) 1.68

n = 291; (N) means negatively worded statement; (P) means positively worded statement
Figure 17. Majority views among Waimanalo residents: Percentage agreeing or strongly agreeing with a given statement

- Tourism has increased traffic. 82.5%
- Government decisions on tourism issues tend to favor tourists over locals. 77.0%
- Vacation rentals have reduced the availability of housing for locals. 69.4%
- Tourism has made transportation more difficult for locals. 68.4%
- Tourism has benefited only a few people. 67.0%
- Tourism has increased the cost of living. 66.7%
- Tourism has destroyed the small town feel of Waimanalo. 65.3%
- I have no difficulty communicating with most of the tourists who visit. 59.5%
- Increased tourism would lower the overall quality of life. 58.8%
- Tourism has made it more difficult for locals to participate in outdoor recreation. 55.0%

n = 291

Figure 18. Majority views among Waimanalo residents: Percentage disagreeing or strongly disagreeing with a given statement

- Waimanalo can handle more tourists. 84.2%
- Tourism has helped to preserve the natural environment in the area. 81.4%
- I support new tourism development in Waimanalo. 79.0%
- Tourists have the same ideas about acceptable behavior as locals. 70.4%
- Tourism has improved the standard of living. 65.6%
- We should encourage more tourists to visit. 63.6%
- Tourism has improved shopping, dining, and entertainment opportunities for locals. 55.7%
- Tourists respect locals’ way of life. 53.6%
- Tourism has created good-paying jobs. 51.5%
- Tourists are considerate of locals. 51.5%
- More tourists will improve the local economy. 50.9%

n = 291
Figure 19. Waimanalo residents’ responses to the attitude statement, “Tourism has brought more benefits than problems”

- Strongly Disagree: 22.7%
- Disagree: 26.4%
- Neither Agree Nor Disagree: 32.1%
- Agree: 13.0%
- Strongly Agree: 5.7%

n = 299
Waimanalo Residents’ Level of Contact With Tourists Visiting Their Community

Respondents were asked to indicate the level of contact they had with tourists visiting Waimanalo on a continuum defined by the same categories used in the Kailua/Lanikai resident survey questionnaire, i.e., “no contact with tourists at all,” “rare, unplanned contact with tourists,” “occasional, unplanned contact with tourists,” “occasional, planned contact with tourists,” “frequent, unplanned contact with tourists,” and “frequent, deliberate contact with tourists as part of my work.” “Occasional, unplanned contact with tourists” and “frequent, unplanned contact with tourists” were by far the most frequent responses, with 37.9% of respondents in each category (Figure 20).

Waimanalo Residents’ Dependence on the Visitor Industry for Their Livelihoods

As in the Kailua/Lanikai resident survey questionnaire, Waimanalo residents’ dependence on tourism for their livelihoods was measured by asking them, “Which of the following income-related situations applies to you?”, with the following response options: “I work for a government agency or nonprofit organization that markets Hawai‘i to prospective tourists,” “I own, operate, or work for a business that directly serves visitors to Hawai‘i (includes vacation rentals),” “I own, operate, or work for a business that supplies some goods or services to tourism-related businesses or destination marketers in Hawai‘i,” and “none of the above.” More than 85% of respondents chose “none of the above”; 14.8% chose some other option (Figure 21). Again, as in the case of Kailua/Lanikai residents, the fact that most residents of Waimanalo indicated no direct economic dependence on tourism to some extent may explain why they hold largely negative attitudes towards tourism in their community, as documented above.

Waimanalo Residents’ Position on a Tourism-Related “Irritation Index”

Respondents were asked, “Which of the following best describes how you feel about the presence of tourists in Waimanalo?”, followed by a continuum defined by the same categories used in the Kailua/Lanikai resident survey questionnaire:

1. “I’m happy with the presence of tourists. I welcome them,”
2. “I’m indifferent to the presence of tourists. They don’t concern me,”
3. “I’m worried about the presence of tourists. They are beginning to concern me,”
4. “I’m irritated by the presence of tourists. They are a problem for me,” and
5. “I’m outraged by the presence of tourists. They are a big problem for me!”

The most frequent response was “I’m worried about the presence of tourists. They are beginning to concern me” (Figure 22). About a third (33.5%) of respondents chose this intermediate option. Over 19% chose, “I’m happy with the presence of tourists. I welcome them.” About 17% chose, “I’m irritated by the presence of tourists. They are a problem for me.” Lower percentages chose the remaining options.
**Figure 20. Waimanalo residents’ perceived level of contact with tourists visiting their community**

Which of the following best describes how much contact you have with tourists in Waimanalo?

<table>
<thead>
<tr>
<th>No contact with tourists at all</th>
<th>Rare, unplanned contact with tourists</th>
<th>Occasional, unplanned contact with tourists</th>
<th>Occasional, planned contact with tourists</th>
<th>Frequent, unplanned contact with tourists</th>
<th>Frequent, deliberate contact with tourists as part of my work</th>
</tr>
</thead>
</table>

n = 256

Most frequent responses

**Figure 21. Waimanalo residents’ dependence on the visitor industry for their livelihoods**

Responses to the question, "Which of the following income-related situations applies to you?"

I work for a government agency or nonprofit organization that markets Hawaii to prospective tourists, 4.5%

I own, operate, or work for a business that directly serves visitors to Hawaii (includes vacation rentals), 3.6%

I own, operate, or work for a business that supplies some goods or services to tourism-related businesses or destination marketers in Hawaii, 6.7%

None of the above, 85.3%

n = 224

**Figure 22. Waimanalo residents’ position on a tourism-related “Irritation Index”**

Which of the following best describes how you feel about the presence of tourists in Waimanalo?

<table>
<thead>
<tr>
<th>I’m happy with the presence of tourists. I welcome them.</th>
<th>I’m indifferent to the presence of tourists. They don’t concern me.</th>
<th>I’m worried about the presence of tourists. They are beginning to concern me.</th>
<th>I’m irritated by the presence of tourists. They are a problem for me.</th>
<th>I’m outraged by the presence of tourists. They are a big problem for me!</th>
</tr>
</thead>
</table>

Mean: 2.92; Standard Deviation: 1.30; Mode: 3; Minimum: 1; Maximum: 5; n=230
When the five response categories were assigned codes from 1 to 5 in the order in which they are listed above, the mean was observed to be 2.92. Since the most frequent response and the mean response were both about 3 on the five-point continuum, it can be concluded that the prevailing attitude of Waimanalo residents toward tourists is that they are “worried about the presence of tourists,” and that tourists “are beginning to concern” them.

**Place Attachment Among Waimanalo Residents**

The level of Waimanalo residents’ attachment to their community was measured by asking respondents to indicate the extent to which they agreed or disagreed with the following statements: “I would be very sad to move away from Waimanalo” and “I’d rather live in Waimanalo than anywhere else.” Over 92% of respondents agreed or strongly agreed with the statement, “I would be very sad to move away from Waimanalo” (Figure 23), and 86.2% agreed or strongly agreed with the statement, “I’d rather live in Waimanalo than anywhere else,” revealing a high level of place attachment in the sample (Figure 24).

**Waimanalo Residents’ Prioritization of Tourism-Related Issues in Their Community**

An IPA using procedures identical to those employed in the Kailua/Lanikai resident survey was conducted to identify Waimanalo residents’ priorities for the resolution of tourism-related issues confronting their community. As shown in Figure 25, the issues that ended up in the “concentrate here” quadrant were:

- “Effective leadership to solve problems caused by tourism,”
- “negative effects of tourism on the natural environment,”
- “negative effects of tourism on cleanliness and appearance,”
- “amount of traffic on roads as a result of tourism,”
- “level of crowding in parks and on sidewalks and beaches as a result of tourism,” and
- “negative effects of tourism on the overall quality of life.”

Based on these results, these six issues should be the focus of efforts to mitigate the negative effects of tourism on Waimanalo.

No issues ended up in the “low priority” quadrant. “Urban sprawl caused by tourism,” “negative effects of vacation rentals,” “level of crowding in shops and restaurants as a result of tourism,” “negative effects of tourism on personal safety,” and “economic benefits of tourism” ended up in the “possible overkill” quadrant, and “tourists’ respect for private property rights,” and “having a voice in tourism-related decisions” ended up in the “keep up the good work” quadrant. Based on these results, these issues should not be ignored, but considered less urgent than those in the “concentrate here” quadrant.
Figure 23. Waimanalo residents’ responses to the attitude statement, “I would be very sad to move away from Waimanalo”

- Strongly Agree, 76.8%
- Agree, 15.8%
- Neither Agree Nor Disagree, 5.4%
- Disagree, 1.7%
- Strongly Disagree, 0.3%

n = 298

Figure 24. Waimanalo residents’ responses to the attitude statement, “I’d rather live in Waimanalo than anywhere else”

- Strongly Agree, 70.8%
- Agree, 15.4%
- Neither Agree Nor Disagree, 10.7%
- Disagree, 2.7%
- Strongly Disagree, 0.3%

n = 298
Figure 25. Waimanalo residents’ prioritization of tourism-related issues in their community

- Concentrate Here
  - Amount of traffic on roads as a result of tourism
  - Effective leadership to solve problems caused by tourism
  - Negative effects of tourism on the natural environment
  - Level of crowding in parks and on sidewalks and beaches as a result of tourism
  - Negative effects of tourism on cleanliness and appearance

- Keep Up the Good Work
  - Tourists’ respect for private property rights
  - Having a voice in tourism-related decisions

- Low Priority
  - Urban sprawl caused by tourism
  - Negative effects of tourism on personal safety
  - Negative effects of vacation rentals
  - Level of crowding in shops and restaurants as a result of tourism

- Possible Overkill
  - Economic benefits of tourism

- Lower Satisfaction

- Lower Importance

n = 212
Waimanalo Residents’ Opinions About Proposed Solutions to Tourism-Related Problems in Their Community

Respondents were presented with the same list of proposed solutions to tourism-related problems used in the Kailua/Lanikai resident survey questionnaire, except, as indicated earlier, making the downtown “a pedestrian mall with parking within walking distance,” to reduce traffic in the city, was omitted since this was deemed inappropriate given Waimanalo’s size. As in the Kailua/Lanikai resident survey questionnaire, respondents were asked to rate the desirability of each proposed solution on a scale from 1 to 5, where 1 meant “very undesirable,” 2 meant, “undesirable,” 3 meant “neutral,” 4 meant “desirable,” and 5 meant “very desirable.”

As shown in Figure 26, the proposed solutions with the highest mean desirability ratings, defined as mean ratings of 4.0 or higher, were:

- “improve maintenance and cleanliness of public restrooms at beach parks” (4.61),
- “strictly enforce laws designed to shut down unlicensed tour operators” (4.41),
- “more heavily fine property owners who illegally operate vacation rentals” (4.34),
- “pass stricter laws and penalties designed to shut down unlicensed tour operators” (4.31),
- “more strictly enforce rules controlling vacation rentals” (4.25),
- “more strictly regulate vacation rentals” (4.20),
- “strictly enforce and penalize bicycling violations” (4.17),
- “require all tourists renting bicycles to watch a bicycle safety video” (4.17), and
- “pass new rules to tax vacation rentals” (4.14).

All but three of the proposed solutions received mean desirability ratings above the “neutral” point of the scale. The three solutions outside this pattern were: “Implement an electronic ‘e-toll’ on all rental cars and tour buses entering Waimanalo. (Vehicles would not have to stop to pay the toll),” “create a paved bicycle/pedestrian pathway, with separate lanes for bicyclists and pedestrians,” and “expand the capacity of parking at beach parks,” with mean desirability ratings of 2.87, 2.83, and 2.69, respectively (Figure 27).

Comparisons of Results Across the Two Resident Surveys

Residents of the two cities generally held similar attitudes toward tourism in their respective communities. For example, 85.0% of Kailua/Lanikai residents agreed or strongly agreed that “tourism has increased traffic”; the comparable percentage among Waimanalo residents was 82.5%. Likewise, 73.2% of Kailua/Lanikai residents agreed or strongly agreed that “vacation rentals have reduced the availability of housing for locals”; the comparable percentage among Waimanalo residents was 69.4%.

Similar results across the cities also emerged with regard to residents’ level of contact with tourists visiting their communities, dependence on the visitor industry for their livelihoods, position on a tourism-related “irritation index,” and place attachment. In addition, the same tourism-related issues were identified as high-priority by virtue of their ending up in the “concentrate here” quadrants of Figures 12 and 25. Finally, residents of the two cities similarly perceived the desirability of most proposed solutions to tourism-related problems in their communities.
Figure 26. Proposed solutions to tourism-related problems in Waimanalo that had the highest mean levels of desirability among residents of Waimanalo

- Improve maintenance and cleanliness of public restrooms at beach parks
- Strictly enforce laws designed to shut down unlicensed tour operators
- More heavily fine property owners who illegally operate vacation rentals
- Pass stricter laws and penalties designed to shut down unlicensed tour operators
- More strictly enforce rules controlling vacation rentals
- More strictly regulate vacation rentals
- Strictly enforce and penalize bicycling violations
- Require all tourists renting bicycles to watch a bicycle safety video
- Pass new rules to tax vacation rentals

n = 246

Figure 27. Proposed solutions to tourism-related problems in Waimanalo that had the lowest mean levels of desirability among residents of Waimanalo

- Reduce marketing of Waimanalo as a tourist destination
- Require all foreigners renting motor vehicles to watch a driver safety video
- Do not allow tour buses to enter Waimanalo on weekends
- Cap the number of nights per year that home owners can rent their properties to tourists
- Encourage tourists to visit less congested areas on Oahu through a smart phone app that would provide real-time information on congestion...
- Expand the capacity of public restrooms at beach parks
- Improve the design and appearance of parking lots at beach parks
- Implement an electronic “e-toll” on all rental cars and tour buses entering Waimanalo. (Vehicles would not have to stop to pay the toll.)
- Create a paved bicycle/pedestrian pathway, with separate lanes for bicyclists and pedestrians
- Expand the capacity of parking at beach parks

n = 246
However, a few important differences in attitudes emerged. Most dramatically, 53.8% of Kailua/Lanikai residents agreed or strongly agreed that “tourism has improved shopping, dining, and entertainment opportunities for locals,” whereas 55.7% of Waimanalo resident disagreed or strongly disagreed with this statement. Some other major differences that emerged were that 67.0% of Waimanalo residents agreed or strongly agreed with the statement, “tourism has benefited only a few people,” compared to only 53.0% of Kailua/Lanikai residents. Similarly, 51.5% of Waimanalo residents, compared to only 30.1% of Kailua/Lanikai residents, disagreed or strongly disagreed with the statement, “tourism has created good-paying jobs.” Finally, 59.5% of Waimanalo residents, compared to only 41.3% of Kailua/Lanikai residents, agreed or strongly agreed with the statement, “I have no difficulty communicating with most of the tourists who visit.” This might be due to Waimanalo attracting a significantly higher proportion of visitors from other communities on O‘ahu compared to Kailua/Lanikai, as documented below.

Kailua/Lanikai Visitor Survey Results

Personal Characteristics of Visitors to Kailua/Lanikai

The ages of respondents ranged from 18 to 84 and averaged 38.4. Forty-six percent of respondents were under the age of 35, 18.3% were age 35-44, 21.0% were age 45-54, 6.3% were age 55-59, 3.7% were age 60-64, and 4.5% were age 65 or older.

Respondents were asked to indicate the location of their primary residence. The most frequently reported origins were places in what the Hawai‘i Tourism Authority (HTA) terms the “U.S. West” (36.4%) and the “U.S. East” (27.1%) (Figure 28). (The “U.S. West” consists of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming; the “U.S. East” consists of all other states in the continental U.S.). Fourteen percent reported that they were residents of other communities on O‘ahu. No respondents indicated that they were from one of Hawai‘i’s neighbor islands.

Combining the Hawai‘i and U.S. mainland results, over three-quarters (77.3%) of visitors were domestic travelers. Therefore, less a quarter (22.7%) were international travelers—6.4% from Canada, 5.8% from Europe, 5.0% from Japan, and 5.4% from other origins, such as Australia, New Zealand, and Latin America.

Information Sources Used by Kailua/Lanikai Visitors

Pre-Departure Information Sources Used by Kailua/Lanikai Visitors. Respondents were asked, “Prior to leaving home on your trip to Hawai‘i, did you discover or learn more about Kailua/Lanikai as a tourist destination from any source of information?” Fifty-five percent answered in the affirmative. Those who did were asked, “How did you discover or learn more about Kailua/Lanikai as a tourist destination prior to leaving home?” and presented with nine response options, such as “friend, relative, co-worker, etc.”, “travel agent,” and “TripAdvisor.com.” They were also presented with an “Other; please specify” option. Respondents were invited to check as many of these options as applied. The results showed that
Figure 28. Origins of visitors to Kailua/Lanikai

- US West: 36.4%
- Oahu: 13.8%
- US East: 27.1%
- Canada: 6.4%
- Japan: 5.0%
- Europe: 5.8%
- Other: 5.4%

n = 516
“friend, relative, co-worker, etc.” accounted for nearly half (48.3%) of all responses and was by far the most commonly cited pre-departure information source, distantly followed by TripAdvisor.com (11.5%), an article (8.4%), an Internet search (5.8%), and GoHawaii.com (5.0%) (Figure 29). Other information sources, such as Facebook (3.6%), YouTube (1.9%), and Instagram (3.1%), were less frequently cited.

A second follow-up question queried respondents, “How much did this information influence you to visit Kailua/Lanikai?” and presented them with the options, “not at all,” “very little,” “to some extent,” and “a great deal.” Nearly two-thirds (64.0%) indicated that the information influenced them to visit “a great deal.”

**Post-Arrival Information Sources Used by Kailua/Lanikai Visitors.** Respondents were asked, “After arriving in Hawai‘i on this trip, did you discover or learn more about Kailua/Lanikai as a tourist destination from any source of information?” Fifty-two percent answered in the affirmative. Those who did were asked, “How did you discover or learn more about Kailua/Lanikai as a tourist destination after arriving in Hawai‘i on this trip?” and presented with nine response options, such as “friend, relative, co-worker, etc.,” “travel agent,” and “TripAdvisor.com.” They were also presented with an “Other; please specify” option. Respondents were invited to check as many of these options as applied. The results showed that “friend, relative, co-worker, etc.” accounted for nearly half (48.5%) of all responses and was by far the most commonly cited post-arrival information source, distantly followed by TripAdvisor.com (8.2%), an article (7.9%), and a travel agent (7.9%) (Figure 30). Other information sources, such as an advertisement on a website (4.3%), GoHawaii.com (4.0%), Internet search (4.0%), and Facebook (2.1%) were less frequently cited.

A second follow-up question queried respondents, “How much did this information influence you to visit Kailua/Lanikai?” and presented them with the options, “not at all,” “very little,” “to some extent,” and “a great deal.” A majority (58.5%) indicated that the information influenced them to visit “a great deal.”

**Party Characteristics of Kailua/Lanikai Visitors**

Reported party sizes, inclusive of respondents, ranged from 1 to 21 and averaged 3.6. The median was 3.0 and the mode was 2.

Respondents were asked, “Who is visiting Kailua/Lanikai today?” and provided with various response options, such as “adult family member(s),” “child(ren) under age 10,” and “friend(s).” The most frequent response was, “adult family member(s)” (44.6%), distantly followed by “friend(s)” (23.4%), “child(ren) age 10-17” (15.1%), “child(ren) under age 10” (12.5%), and “just myself” (3.7%). Even fewer responses fell into the categories of “organized group” (0.4%), “business associates” (0.1%), or “other” (0.1%).
Figure 29. How visitors to Kailua/Lanikai discovered or learned more about Kailua/Lanikai prior to leaving home

- Friend, relative, co-worker, etc.: 48.3%
- TripAdvisor.com: 11.5%
- Travel agent: 1.9%
- Google / Google Maps / Internet search: 5.8%
- GoHawaii.com: 5.0%
- Facebook.com: 3.6%
- Article: 8.4%
- Advertisement on a website: 2.4%
- Transient vacation rental/transient vacation rental host: 0.5%
- Blog: 0.7%
- Book / Guidebook: 2.9%
- GPS-based travel guide: 0.2%
- Instagram: 3.1%
- Yelp: 0.5%
- Lonely Planet: 0.5%
- Other social media: 0.2%
- TV program: 0.2%
- YouTube: 0.5%
- Other online source: 1.0%
- E-mail advertisement: 0.2%
- Other; please specify: 1.0%

n = 416 responses
Figure 30. How visitors to Kailua/Lanikai discovered or learned more about Kailua/Lanikai after arriving in Hawai’i

- Friend, relative, co-worker, etc.: 48.5%
- TripAdvisor.com: 8.2%
- GoHawaii.com: 4.0%
- Facebook.com: 2.1%
- Advertisement on a website: 4.3%
- Travel agent: 7.9%
- Article: 7.9%
- Other; please specify: 0.3%
- Brochure / Pamphlet: 1.2%
- Google / Google Maps / Internet search: 4.0%
- GPS-based travel guide: 0.3%
- Blog: 0.3%
- Transient vacation rental/transient vacation rental host: 1.5%
- Lonely Planet: 0.3%
- Tourist map: 0.6%
- YouTube: 0.6%
- Yelp: 1.5%
- Other online source: 1.5%
- transient vacation rental host: 1.5%

n = 328 responses
Basic Trip Characteristics of Kailua/Lanikai Visitors

Nearly three-quarters of respondents (74.4%) indicated that they were repeat visitors to Hawai‘i and a majority (57.2%) indicated that they were repeat visitors to Kailua/Lanikai. However, only 26.1% considered Kailua/Lanikai to be the “main destination” of their trip to Hawai‘i.

Respondents were asked, “What is the purpose of your visit to Kailua/Lanikai?”, presented with five response options (“business,” “convention or meeting,” “recreation,” “visit relative(s) and/or friend(s),” and “other”), and invited to “check one or more categories.” Over two-thirds (67.0%) of the ensuing responses were “recreation,” distantly followed by “visit relative(s) and/or friend(s)” (27.2%), “business” (2.1%), “convention or meeting” (1.7%), and “other” (2.1%).

Respondents were also asked a multiple response question on how they traveled to Kailua/Lanikai. The most frequent responses were: rental vehicle (50.7%) and the respondent’s own vehicle (38.3%), distantly followed by public bus (3.7%), Uber/Lyft (2.8%), tour bus or van (1.1%), conventional taxi (0.9%), bicycle (0.7%), and “other” (1.7%).

Respondents who indicated that they traveled to Kailua/Lanikai in their own vehicle or a rental vehicle were also asked a multiple response question on where they parked. The most frequent responses were, “on the street in a residential neighborhood” (52.0%) and “parking lot at Kailua Beach Park (33.3%), distantly followed by “on the street in downtown Kailua” (6.3%), “parking garage in downtown Kailua” (1.0%), and “other” (7.3%). When queried about their level of satisfaction “with vehicle parking in Kailua/Lanikai,” and presented with scale that ranged from 1 (“extremely dissatisfied”) to 5 (“extremely satisfied”), the most frequent response was 3 (“somewhat satisfied”) (42.5%). Scores ranged from 1 to 5 and averaged 3.26.

Kailua/Lanikai Visitors’ Length of Stay

Respondents who were not residents of Oahu reported that upon completion of their trips they would spend, on average, 9.6 nights on Oahu, 11.7 nights in Hawai‘i as a whole, and 12.2 nights on their trips altogether.

Among all respondents, length of stay in Kailua/Lanikai ranged from any portion of a day to 181 days and averaged 3.3 days. Only about a quarter (25.5%) of respondents indicated that they spent one or more nights in Kailua/Lanikai. Day-visitors on average spent 5.6 hours in the city.

Kailua/Lanikai Visitors’ Use of Accommodations

Among overnight visitors to Kailua/Lanikai, 45.9% of the total nights spent in the city were spent in a friend’s or relative’s home and 42.0% were spent in an Airbnb, Vrbo, or Homeaway (Figure 31). Significantly lower percentages of the total nights spent in Kailua/Lanikai were spent in some other type of vacation rental (8.8%), a traditional Bed & Breakfast (2.3%), a timeshare (0.6%), a campsite (0.3%), or some other type of lodging (0.1%).
Figure 31. Distribution of total nights spent by overnight visitors to Kailua/Lanikai, by lodging type

- Airbnb, Vrbo, or Homeaway: 42.0%
- Other type of vacation rental: 8.8%
- Traditional Bed & Breakfast: 2.3%
- Timeshare: 0.6%
- Friend’s or relative’s home: 45.9%
- Other: 0.1%
- Campsite: 0.3%

n = 127

Socioeconomic Impacts of Tourism in Kailua and Waimanalo, Hawai’i
Kailua/Lanikai Visitors’ Participation in Recreation Activities

During their visits to Kailua/Lanikai, respondents participated in a wide variety of recreation activities, in one case as many as 15 activities. The most popular activities were swimming or wading in the ocean (18.3%), sunbathing (17.0%), and beach walking (16.7%) (Figure 3.2). Between 4.0% and 8.0% participated in shopping, dining at a table service restaurant, hiking the Lanikai Pillbox Trail, hiking some other trail, snorkeling, and body surfing/boogie boarding. Between 1.0% and 3.0% participated in stand-up paddleboarding, attending an event, sea kayaking, nightlife, and bicycling. Less than 1.0% participated in surfing, boating, outrigger canoeing, fishing, scuba diving, kitesurfing, reading, working out on the beach, windsurfing, parasailing, jet skiing, or some other activity. Only 0.1% participated in none of these activities.

Satisfaction Levels of Kailua/Lanikai Visitors

Respondents were presented with a list of 10 “aspects of Kailua/Lanikai” and asked to indicate how satisfied or dissatisfied they were with each of them, as well as with the community overall. Satisfaction levels were measured on a scale from 1 to 5, in which 1 meant, “extremely dissatisfied,” 3 meant “somewhat satisfied,” and 5 meant “extremely satisfied.”

The results revealed that visitors generally had high levels of satisfaction. The mean level of satisfaction was above 3.00, the midpoint of the scale, for all items about which respondents were queried, and was 4.27 in the case of the item that queried respondents about their overall satisfaction level (Figure 3.3).

Mean satisfaction levels were highest for the items:

- “quality of the natural environment” (4.29),
- “personal safety” (4.24),
- “cleanliness and appearance” (4.18),
- “friendliness of the local people” (4.17), and
- “security of my belongs” (4.13).

Mean satisfaction levels were lower for:

- “customer service in shops and restaurants” (3.99),
- “quality of goods and services available to buy” (3.93),
- “level of crowding in shops and restaurants” (3.57),
- “level of crowding in parks and on sidewalks and beaches” (3.39), and
- “amount of traffic on roads” (3.29).

All of the means listed above are higher than the mean level of satisfaction with vehicle parking in Kailua/Lanikai (3.26) reported earlier in the section on “Basic Trip Characteristics.”
Figure 32. Percentage of visitors to Kailua/Lanikai that participated in various types of recreation during their visits

- Swimming or wading in the ocean: 18.26%
- Beach walking: 17.03%
- Dining at table service restaurant: 7.19%
- Snorkeling: 6.33%
- Body surfing/boogie boarding: 6.29%
- Attending an event: 6.29%
- Nightlife: 6.33%
- Surfing: 5.74%
- Other: 4.70%
- Kitesurfing: 4.70%
- Work out on the beach: 4.70%
- Parasailing: 4.70%
- None of the above: 4.70%

n = 2,448 responses

Figure 33. Mean levels of satisfactions among visitors to Kailua/Lanikai

- Quality of the area's natural environment: 4.29
- OVERALL: 4.27
- Personal safety: 4.24
- Cleanliness and appearance: 4.18
- Friendliness of the local people: 4.17
- Security of my belongings: 4.13
- Customer service in shops and restaurants: 3.99
- Quality of goods and services available to buy: 3.93
- Level of crowding in shops and restaurants: 3.57
- Level of crowding in parks and on sidewalks and beaches: 3.39
- Amount of traffic on roads: 3.29

n = 444
Prioritization of Tourism-Related Issues by Kailua/Lanikai Visitors

An IPA was also conducted on tourism-related issues as perceived by visitors. Respondents were presented with a list of the same “aspects of Kailua/Lanikai” about which they were queried with respect to their satisfaction levels, and asked to indicate how important or unimportant each item was to them. Importance levels were measured on a scale from 1 to 5, in which 1 meant, “not at all important,” and 5 meant “extremely important.”

No aspects of the community ended up in the “concentrate here” quadrant, reflecting the high levels of satisfaction with aspects of Kailua/Lanikai that respondents considered important.

“Quality of the area’s natural environment,” “security of my belongings,” “cleanliness and appearance,” “personal safety,” and “friendliness of the local people” ended up in the “keep up the good work” quadrant (Figure 34). Based on these results, these aspects of Kailua/Lanikai should be emphasized in efforts to maintain the attractiveness of the community to visitors.

All three congestion-related issues — “level of crowding in parks and on sidewalks and beaches,” “level of crowding in shops and restaurants,” and “amount of traffic on roads” — ended up in the “low priority” quadrant. “Customer service in shops and restaurants” and “quality of goods and services available to buy” ended up in the “possible overkill” quadrant. Based on these results, these issues should not be ignored, but considered less urgent than others.

Kailua/Lanikai Visitors’ Likelihood of Repeat Visitation to, and Recommendations of, Kailua/Lanikai

Respondents were asked, “How likely are you to visit Kailua/Lanikai again?” and “How likely are you to recommend a visit to Kailua/Lanikai to someone you know?” Both queries provided five response options: “very unlikely,” “unlikely,” “neither likely nor unlikely,” “likely,” and “very likely.” Nearly 85 percent of respondents reported that it was “likely” or “very likely” that they would visit Kailua/Lanikai again (Figure 35), and 90.6% reported that it was “likely” or “very likely” that they would recommend a visit to Kailua/Lanikai to someone they knew (Figure 36). These results again reflect the high levels of satisfaction with aspects of Kailua/Lanikai that respondents considered important, and portend a continuation of existing levels of visitation if current levels of quality and marketing remain unchanged.

Average Spending by Kailua/Lanikai Visitors

Respondents were asked, “Have you spent any money in Kailua/Lanikai so far on your visit here?” Those who answered in the affirmative were then asked, “About how much have you and other members of your personal group spent in Kailua/Lanikai so far on your visit here, including any pre-paid lodging deposits?” Since some respondents were intercepted toward the beginning, rather than the end, of their stays in the community, only those respondents who affirmed, in response to a separate query, that they would be “leaving Kailua/Lanikai within the next hour” were included in the derivation of estimates of visitor spending in the community.
Figure 34. Kailua/Lanikai visitors' prioritization of tourism-related issues in the city

- Concentrate Here
  - HIGHER IMPORTANCE
    - Quality of the area's natural environment
    - Personal safety
  - LOWER IMPORTANCE
    - Level of crowding in parks and on sidewalks and beaches
    - Cleanliness and appearance

- Keep Up the Good Work
  - HIGHER SATISFACTION
    - Security of my belongings
    - Friendliness of the local people
  - LOWER SATISFACTION
    - Customer service in shops and restaurants
    - Quality of goods and services available to buy

- Low Priority
  - HIGHER IMPORTANCE
    - Personal safety
  - LOWER IMPORTANCE
    - Level of crowding in shops and restaurants
  - LOWEST IMPORTANCE
    - Amount of traffic on roads

- Possible Overkill
  - LOWEST IMPORTANCE
    - Personal safety

n = 459
Figure 35. Kailua/Lanikai visitors' perceptions of the likelihood of visiting again

- Very unlikely: 5.8%
- Unlikely: 1.7%
- Neither likely nor unlikely: 7.7%
- Likely: 23.9%
- Very likely: 60.8%

n = 531

Figure 36. Kailua/Lanikai visitors' perceptions of the likelihood of their recommending a visit to Kailua/Lanikai to someone they know

- Very unlikely: 5.7%
- Unlikely: 0.6%
- Neither likely nor unlikely: 3.2%
- Likely: 21.2%
- Very likely: 69.4%

n = 529
On average, visitors to Kailua/Lanikai spent $28.89 per person per day, $80.52 per party per day, $95.43 per person per trip, and $250.48 per party per trip in the city (Figure 37). Visitor spending per party per trip averaged $103.38 for transient vacation rentals, $47.71 for restaurants and bars, $36.05 for groceries and take out food, $30.58 for vehicle rental, $4.72 for gasoline and oil, $4.30 for attraction admission, $3.50 for entertainment, $2.76 for equipment rental, and $17.48 for all other purchases (Figure 38). On a percentage basis, the largest shares of visitor spending per party per trip were allocated to transient vacation rentals (41.3%), restaurants and bars (19.0%), groceries and take out food (14.4%), and vehicle rental (12.2%). Smaller shares of spending per party per trip were allocated to gasoline and oil (1.9%), attraction admission (1.7%), entertainment (1.4%), equipment rental (1.1%), and other purchases (7.0%) (Figure 39).

Estimated Visitor Volume in Kailua/Lanikai

Tourism planning and management in any destination can be significantly aided by having a sense of the volume of visitation the destination receives. This information is especially useful for determining infrastructure, facility, and manpower needs, all of which are vital to the economic viability and environmental protection, and hence sustainability, of the destination.

The survey data were analyzed to generate statistics that could be combined with various data collected and reported by the HTA to estimate visitor volume in Kailua/Lanikai. Using the HTA statistics necessitated adopting, for purposes of this analysis, their narrower definition of a “visitor” as an adult who does not reside in Hawai‘i. (In all analyses reported above a “visitor” was defined as an adult who does not reside in Kailua/Lanikai.) In addition, the HTA statistics pertain to visitors who traveled to Hawai‘i by air and excludes those who traveled to the state via cruise ship. However, this is not a serious limitation since the HTA’s most recent annual research report documents the fact that only 1.3% of visitors travel to the state via cruise ship (HTA, n.d. 1).

The estimation of visitor volume involved the following steps:

1. A special analysis by the HTA of data from their third quarter Visitor Satisfaction Study report (Anthology Marketing Group, n.d.) revealed that 24.6% of the tourists that stayed at least two days in Hawai‘i stated that they visited “Lanikai or Kailua Beach” in July 2019. The Visitor Satisfaction Study is based on a survey of visitors to Hawai‘i from the U.S., Japan, Canada, Europe, Oceania, China, and Korea who stayed at least two days in the state. The visitors omitted as a result of the adoption of these parameters are considered negligible. In July 2019, visitors from these eight origin areas constituted 94.5% of all air visitors to the state (HTA, n.d. 2), and a special analysis by the HTA revealed that only 5.4% of visitors to O‘ahu stayed less than two days on the island.

Figure 37. Mean levels of visitor spending in Kailua/Lanikai

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean spending per party per trip</th>
<th>Mean spending per person per trip</th>
<th>Mean spending per party per day</th>
<th>Mean spending per person per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airbnb, Vrbo, or HomeAway</td>
<td>$250.48</td>
<td>$95.43</td>
<td>$80.52</td>
<td>$28.89</td>
</tr>
<tr>
<td>Restaurants and bars</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Groceries and take out food</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vehicle rental</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gasoline and oil</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attraction admission</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment rental</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All other purchases</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 38. Mean visitor spending in Kailua/Lanikai per party per trip, by spending category

- Airbnb, Vrbo, or HomeAway: $103.38
- Restaurants and bars: $47.71
- Groceries and take out food: $36.05
- Vehicle rental: $30.58
- Gasoline and oil: $4.72
- Attraction admission: $4.30
- Entertainment: $3.50
- Equipment rental: $2.76
- All other purchases: $17.48

n = 107
Figure 39. Distribution of visitor spending in Kailua/Lanikai per party per trip across spending categories

- Airbnb, Vrbo, or HomeAway: 41.3%
- Restaurants and bars: 19.0%
- Groceries and take out food: 14.4%
- Vehicle rental: 12.2%
- All other purchases: 7.0%
- Gasoline and oil: 1.9%
- Equipment rental: 1.1%
- Attraction admission: 1.7%
- Entertainment: 1.4%

n = 107
3. The 24.6% of visitors who visited “Lanikai or Kailua Beach” in July 2019, multiplied by the 601,683 tourists who visited O‘ahu during July 2019, yielded 148,014 tourists who visited “Lanikai or Kailua Beach” in July 2019.

4. The 148,014 tourists who visited “Lanikai or Kailua Beach” in July 2019, divided by the 90.9% of our Kailua/Lanikai sample that indicated that they did so, yielded an estimated 162,832 tourists who visited Kailua/Lanikai in July 2019. To achieve comparability with the HTA results, respondents surveyed in August, Hawai‘i residents, and respondents who did not answer questions about whether they visited Kailua and/or Lanikai beaches (Questions 17 and 18 in the questionnaire in Appendix G), were omitted from our sample in the computation of the 90.9% estimate, leaving a data base of 416 cases.

5. A reported 601,683 air visitors visited O‘ahu in July 2019 (HTA, 2020a) and 6,193,027 visited O‘ahu in 2019 as a whole (HTA, 2020b). Thus, in 2019 July visitation constituted 9.71% of annual visitation to O‘ahu. Assuming a similar percentage applies to visitors to Kailua/Lanikai, the estimated 162,832 persons who visited Kailua/Lanikai in July 2019, divided by 9.71%, yielded an estimate of 1,676,952 visitors to Kailua/Lanikai in 2019 as a whole.

6. The estimated 1,676,952 persons who visited Kailua/Lanikai in 2019, multiplied by an average length of stay in Kailua/Lanikai of 3.3 days, computed from the survey data base in its entirety, yielded an estimate of 5,533,942 visitor-days in Kailua/Lanikai in 2019.

7. These estimated 5,533,942 visitor-days, divided by 365, yielded an annual average daily census of 15,161 visitors. Thus, on any given day in 2019, on average about 15,161 visitors were present in Kailua/Lanikai.

8. The 36,662 persons comprising the 2018 resident population of Kailua/Lanikai (U.S. Bureau of the Census, 2020a), plus the average daily census of 15,161 visitors, yields a de facto population of 51,823 persons. Therefore, the 15,161 visitors present in the community on any given day comprise (15,161/51,823) x 100 or 29.2% of all persons in the community. This estimate is an annual average; during periods in which tourist visitation is heavier or lighter than usual, visitors might comprise more or less than 29.2% of the persons present in Kailua/Lanikai on average. Nevertheless, the magnitude of the 29.2% annual average daily census helps to explain the level of concern that many residents have about tourism in their community.

Aggregate Direct Expenditures of Kailua/Lanikai Visitors

Given that economic vitality is a component of the “triple bottom line” of sustainable tourism, it is useful to obtain a sense of the contribution that tourism makes to Kailua/Lanikai’s economy by estimating the aggregate expenditures of its visitors. Such an estimate is provided below to help inform stakeholders of how much tourism is contributing to the economic health of the
community, in relation to the costs associated with hosting visitors, such as increased spending on transportation and recreation infrastructure and facilities, and police, fire, and medical services, as well as such non-monetary “costs” as congestion and pollution. Once again, the survey data were analyzed to generate statistics that could be combined with various data collected and reported by the HTA, and this in turn necessitated adopting, for this analysis, their definition of a “visitor” as someone who does not reside in Hawai‘i.

The generation of aggregate visitor spending estimates involved the following steps:

1. The same subsample of 416 respondents described in the preceding section contained 84 respondents who stated that they would be leaving Kailua/Lanikai within the next hour. Among these 84 respondents, mean expenditures per person per trip in July 2019 were $66.38.

2. The $66.38 in mean expenditures per person per trip, multiplied by the 162,832 tourists who visited Kailua/Lanikai in July 2019, estimated using procedures described in the preceding section, yielded $10,808,788 in estimated direct tourist expenditures in Kailua/Lanikai in July 2019.

3. The proportion of total 2019 tourist spending in Kailua/Lanikai that occurred in July 2019 was assumed to be the same as the proportion of total 2019 tourist spending on O‘ahu as a whole in July 2019. According to the HTA (2020a), total air visitor spending on O‘ahu in July 2019 was $764.6 million, and total air visitor spending on O‘ahu for 2019 as a whole was $8,192.5 million (HTA, 2020b). Thus, tourist spending on O‘ahu in July 2019 represented an estimated ($764.6 / $8,192.5) x 100 or 9.3% of total 2019 spending on O‘ahu.

4. The estimated $10,808,788 spent in Kailua/Lanikai by tourists in July 2019, divided by 9.3%, yielded an estimated $116.2 million in tourist spending in Kailua in 2019 as a whole. This is a conservative estimate because it does not account for the expenditures of Hawai‘i residents who visited Kailua/Lanikai or visitors who may have spent some additional dollars in the community during their last hour there. It represents 1.4% of the $8.2 billion in air visitor spending on O‘ahu in 2019 and 0.6% of the $17.7 billion in air visitor spending in the state as a whole in 2019 (HTA, 2020b).

The distribution of the estimated $116.2 million across spending categories was as follows. About $48.8 million was spent on transient vacation rentals, $18.8 million was spent in restaurants and bars, $18.0 million was spent on groceries and take-out food, and $15.1 million was spent on vehicle rental. Significantly smaller amounts were spent on attraction admission ($2.6 million), entertainment ($2.5 million), gasoline and oil ($2.2 million), and equipment rental ($1.3 million).

The $116.2 million estimate accounts only for the so-called “direct expenditures” of tourists in Kailua/Lanikai; it is not an estimate of the total economic impact of tourism on the community. The total economic impact would also account for the circulation of the “direct expenditures” of tourists in Kailua/Lanikai’s economy as a result of these expenditures impelling the suppliers and employees of the businesses tourists patronized to spend more money in the community than
they otherwise would have, and then the suppliers and employees of these businesses spending more than they otherwise would have, etc. in successive rounds of spending. In the aggregate, these spin-off expenditures constitute the “secondary impacts” of tourist spending.

Because of the smallness of Kailua/Lanikai, estimating the secondary impacts of tourist spending in the community was not feasible, so only direct tourist expenditures were estimated. Secondary impacts are proportionate to the economic self-sufficiency of a study area. Given the lack of economic self-sufficiency in Kailua/Lanikai that is typical of most small island communities, the secondary economic impacts in Kailua/Lanikai are not likely to be a major component of the total economic impact of tourism on the community. Nevertheless, it should be understood that the total economic impact of tourism on Kailua/Lanikai is higher than the estimate of direct tourist expenditures reported above.

Waimanalo Visitor Survey Results

**Personal Characteristics of Visitors to Waimanalo**

The ages of respondents ranged from 18 to 85 and averaged 38.9. Forty-four percent of respondents were under the age of 35, 23.3% were age 35-44, 20.7% were age 45-54, 2.4% were age 55-59, 3.3% were age 60-64, and 6.2% were age 65 or older.

Respondents were asked to indicate the location of their primary residence. Forty-one percent reported that they were residents of other communities on Oʻahu (Figure 40). This was by far the most frequently cited origin. Only two respondents (0.2%) indicated that they were from one of Hawaiʻi’s neighbor islands.

Outside of Hawaiʻi, the most frequently reported origins were places in what the HTA terms the “U.S. West” (24.0%) and the “U.S. East” (22.5%) (Figure 40). Combining the Hawaiʻi and U.S. mainland results, 87.8% of visitors were domestic travelers. Therefore, 12.2% were international travelers—4.8% from Europe, 2.9% from Canada, 0.2% from Japan, and 4.3% from other origins, such as Australia, New Zealand, and Latin America.

**Information Sources Used by Waimanalo Visitors**

**Pre-Departure Information Sources Used by Waimanalo Visitors.** Respondents were asked, “Prior to leaving home on your trip to Hawaiʻi, did you discover or learn more about Waimanalo as a tourist destination from any source of information?” Thirty-one percent answered in the affirmative. Those who did were asked, “How did you discover or learn more about Waimanalo as a tourist destination prior to leaving home?” and presented with nine response options, such as “friend, relative, co-worker, etc.”, “travel agent,” and “TripAdvisor.com.” They were also presented with an “Other; please specify” option. Respondents were invited to check as many of these options as applied. The results showed that “friend, relative, co-worker, etc.” accounted for over half (56.7%) of all responses and was by far the most commonly cited pre-departure information source, distantly followed by an article (10.0%), TripAdvisor.com (9.3%), an Internet search (5.3%), GoHawaii.com (4.0%), and an advertisement on a website (4.0%) (Figure 56).
Figure 40. Origins of visitors to Waimanalo

- Elsewhere on Oahu: 40.8%
- US West: 24.0%
- US East: 22.5%
- Canada: 2.9%
- Japan: 0.2%
- Europe: 4.8%
- Other: 4.3%
- Neighbor Island: 0.5%

n = 417
Other information sources, such as Facebook (3.3%), YouTube (1.3%), and Instagram (0.7%), were less frequently cited.

A second follow-up question queried respondents, “How much did this information influence you to visit Waimanalo?” and presented them with the options, “not at all,” “very little,” “to some extent,” and “a great deal.” Sixty-one percent indicated that the information influenced them to visit “a great deal.”

**Post-Arrival Information Sources Used by Waimanalo Visitors.** Respondents were asked, “After arriving in Hawai‘i on this trip, did you discover or learn more about Waimanalo as a tourist destination from any source of information?” Thirty-six percent answered in the affirmative. Those who did were asked, “How did you discover or learn more about Waimanalo as a tourist destination after arriving in Hawai‘i on this trip?” and presented with nine response options, such as “friend, relative, co-worker, etc.,” “travel agent,” and “TripAdvisor.com.” They were also presented with an “Other; please specify” option. Respondents were invited to check as many of these options as applied. The results showed that “friend, relative, co-worker, etc.” accounted for over two-thirds (68.7%) of all responses and was by far the most commonly cited post-arrival information source, distantly followed by TripAdvisor.com (5.4%), Internet search (5.4%), an article (4.2%), book/guidebook (3.0%), and GoHawaii.com (3.0%) (Figure 42). Other information sources, such as a travel agent (2.4%), an advertisement on a website (1.2%), and Facebook (0.6%) were less frequently cited.

A second follow-up question queried respondents, “How much did this information influence you to visit Waimanalo?” and presented them with the options, “not at all,” “very little,” “to some extent,” and “a great deal.” A majority (59.2%) indicated that the information influenced them to visit “a great deal.”

**Party Characteristics of Waimanalo Visitors**

Reported party sizes, inclusive of respondents, ranged from 1 to 20 and averaged 4.3. The median was 4.0 and the mode was 2.

Respondents were asked, “Who is visiting Waimanalo today?” and provided with various response options, such as “adult family member(s),” “child(ren) under age 10,” and “friend(s).” The most frequent response was, “adult family member(s)” (41.7%), distantly followed by “friend(s)” (26.2%), “child(ren) under age 10” (13.7%), “child(ren) age 10-17” (13.5%), and “just myself” (2.8%). Even fewer responses fell into the categories of “organized group” (0.8%), “business associates” (0.6%), or “other” (0.8%).

**Basic Trip Characteristics of Waimanalo Visitors**

Over three-quarters of respondents (78.7%) indicated that they were repeat visitors to Hawai‘i and nearly two-thirds (65.1%) indicated that they were repeat visitors to Waimanalo. However, only 8.7% considered Waimanalo to be the “main destination” of their trip to Hawai‘i.
Figure 41. How visitors to Waimanalo discovered or learned more about Waimanalo prior to leaving home

- Friend, relative, co-worker, etc.: 56.7%
- TripAdvisor.com: 9.3%
- GoHawaii.com: 4.0%
- Facebook.com: 3.3%
- Advertisement on a website: 4.0%
- Article: 10.0%
- Blog: 2.0%
- Book / Guidebook: 1.3%
- Google / Google Maps / Internet search: 5.3%
- Instagram: 0.7%
- YouTube: 1.3%
- Other; please specify: 0.7%

n = 150 responses
Figure 42. How visitors to Waimanalo discovered or learned more about Waimanalo after arriving in Hawaii

n = 166 responses
Respondents were asked, “What is the purpose of your visit to Waimanalo?”, presented with five response options (“business,” “convention or meeting,” “recreation,” “visit relative(s) and/or friend(s),” and “other”), and invited to “check one or more categories.” Over three-quarters (76.8%) of the ensuing responses were “recreation,” distantly followed by “visit relative(s) and/or friend(s)” (18.3%), “business” (1.8%), “convention or meeting” (0.4%), and “other” (2.7%).

Respondents were also asked a multiple response question on how they traveled to Waimanalo. The most frequent responses were: the respondent’s own vehicle (61.9%), rental vehicle (34.8%), distantly followed by public bus (0.5%), Uber/Lyft (0.5%), conventional taxi (0.5%), and “other” (1.9%).

Respondents who indicated that they traveled to Waimanalo in their own vehicle or a rental vehicle were also asked a multiple response question on where they parked. The most frequent responses were, “parking lot at Waimanalo Beach Park (64.3%) and “on the street in a residential neighborhood” (26.7%), distantly followed by “on the street in downtown Waimanalo” (1.2%) and “other” (7.7%). When queried about their level of satisfaction “with vehicle parking in Waimanalo,” and presented with scale that ranged from 1 (“extremely dissatisfied”) to 5 (“extremely satisfied”), the most frequent response was 5 (“extremely satisfied”) (45.7%). Scores ranged from 1 to 5 and averaged 4.00.

**Waimanalo Visitors’ Length of Stay**

Respondents who were not residents of Oahu reported that upon completion of their trips they would spend, on average, 11.0 nights on Oahu, 13.5 nights in Hawai‘i as a whole, and 13.9 nights on their trips altogether.

Among all respondents, length of stay in Waimanalo ranged from any portion of a day to 25 days and averaged 1.5 days. Only 8.1% of respondents indicated that they spent one or more nights in Waimanalo. Day-visitors to Waimanalo spent an average of 5.1 hours in the city.

**Waimanalo Visitors’ Use of Accommodations**

Among overnight visitors to Waimanalo, 64.2% of the total nights spent in the city were spent in an Airbnb, Vrbo, or Homeaway, 4.1% were spent in some other type of vacation rental, and 31.7% were spent in a friend’s or relative’s home (Figure 43).
Figure 43. Distribution of total nights spent by overnight visitors to Waimanalo, by lodging type

- Airbnb, Vrbo, or Homeaway: 64.2%
- Friend's or relative's home: 31.7%
- Other type of vacation rental: 4.1%

n = 28
**Waimanalo Visitors’ Participation in Recreation Activities**

During their visits to Waimanalo, respondents participated in a wide variety of recreation activities, in one case as many as 17 activities. The most popular activities were swimming or wading in the ocean (21.1%), sunbathing (19.4%), beach walking (18.9%), and body surfing/boogie boarding (11.9%) (Figure 44). Between 2.0% and 5.0% participated in surfing, shopping, dining at a table service restaurant, hiking the Lanikai Pillbox Trail, hiking some other trail, and snorkeling. Less than 2% participated in attending an event, stand-up paddleboarding, nightlife, boating, sea kayaking, fishing, scuba diving, volleyball, outrigger canoeing, bicycling, visiting a farm, jet skiing, reading, working out on the beach, parasailing, kitesurfing, hang gliding, or some other activity. Only 0.3% participated in none of these activities.

**Satisfaction Levels of Waimanalo Visitors**

Respondents were presented with a list of 10 “aspects of Waimanalo” and asked to indicate how satisfied or dissatisfied they were with each of them, as well as with the community overall. Satisfaction levels were measured on a scale from 1 to 5, in which 1 meant, “extremely dissatisfied,” 3 meant “somewhat satisfied,” and 5 meant “extremely satisfied.”

The results revealed that visitors generally had high levels of satisfaction. The mean level of satisfaction was above 3.00, the midpoint of the scale, for all items about which respondents were queried, and was 4.21 in the case of the item that queried respondents about their overall satisfaction level (Figure 45).

Mean satisfaction levels were highest for the items:

- “quality of the natural environment” (4.29),
- “friendliness of the local people” (4.16), and
- “personal safety” (4.12).

Mean satisfaction levels were lower for:

- “security of my belongs” (3.98),
- “cleanliness and appearance” (3.96),
- “level of crowding in parks and on sidewalks and beaches” (3.90),
- “customer service in shops and restaurants” (3.86),
- “level of crowding in shops and restaurants” (3.82),
- “quality of goods and services available to buy” (3.70), and
- “amount of traffic on roads” (3.41).

**Prioritization of Tourism-Related Issues by Waimanalo Visitors**

To permit an IPA to be conducted, respondents were presented with a list of the same “aspects of Waimanalo” about which they were queried with respect to their satisfaction levels, and asked to
Figure 44. Percentage of visitors to Waimanalo that participated in various types of recreation during their visits

- Swimming or wading in the ocean: 21.12%
- Beach walking: 19.42%
- Hiking on some other trail: 11.90%
- Hiking on Lanikai Pillbox Trail: 9.38%
- Shopping: 8.28%
- Attending an event: 7.06%
- Stand-up paddleboarding: 6.62%
- Boating: 5.88%
- Fishing: 5.46%
- Volleyball: 5.31%
- Jet skiing: 5.13%
- Working out on the beach: 5.13%
- Kitesurfing: 5.13%
- Beach walking: 5.13%
- Swimming or wading in the ocean: 5.13%
- Attending an event: 5.13%
- Stand-up paddleboarding: 5.13%
- Boating: 5.13%
- Fishing: 5.13%
- Volleyball: 5.13%
- Jet skiing: 5.13%
- Working out on the beach: 5.13%
- Kitesurfing: 5.13%
- None of the above: 3.41%

n = 1,596 responses

Figure 45. Mean levels of satisfaction among visitors to Waimanalo

- Quality of the area’s natural environment: 4.29
- OVERALL: 4.21
- Friendliness of the local people: 4.16
- Personal safety: 4.12
- Security of my belongings: 3.98
- Cleanliness and appearance: 3.96
- Level of crowding in parks and on sidewalks and…: 3.90
- Customer service in shops and restaurants: 3.86
- Level of crowding in shops and restaurants: 3.82
- Quality of goods and services available to buy: 3.70
- Amount of traffic on roads: 3.41

n = 343
indicate how important or unimportant each item was to them. Importance levels were measured on a scale from 1 to 5, in which 1 meant, “not at all important,” and 5 meant “extremely important.”

“Level of crowding in parks and on sidewalks and beaches” ended up in the “concentrate here” quadrant (Figure 46). This suggests that this aspect of Waimanalo should be emphasized in efforts to improve the attractiveness of the community to visitors.

“Quality of the area’s natural environment,” “security of my belongings,” “personal safety,” “cleanliness and appearance,” and “friendliness of the local people” ended up in the “keep up the good work” quadrant. This suggest that these aspects of Waimanalo are important to maintaining the attractiveness of the community to visitors.

“Amount of traffic on roads,” “customer service in shops and restaurants,” “level of crowding in shops and restaurants,” and “quality of goods and services available to buy” ended up in the “low priority” quadrant. Based on these results, these issues should not be ignored, but considered less urgent than others. No aspects of Waimanalo ended up in the “possible overkill” quadrant.

**Waimanalo Visitors’ Likelihood of Repeat Visitation to, and Recommendations of, Waimanalo**

Respondents were asked, “How likely are you to visit Waimanalo again?” and “How likely are you to recommend a visit to Waimanalo to someone you know?” Both queries provided five response options: “very unlikely,” “unlikely,” “neither likely nor unlikely,” “likely,” and “very likely.” Over 87% of respondents reported that it was “likely” or “very likely” that they would visit Waimanalo again (Figure 47), and 89.0% reported that it was “likely” or “very likely” that they would recommend a visit to Waimanalo to someone they knew (Figure 48). These results again reflect the high levels of satisfaction with most of the aspects of Waimanalo that respondents considered important, and portend continued high levels of visitation if current levels of quality and marketing remain unchanged.

**Average Spending by Waimanalo Visitors**

Respondents were asked, “Have you spent any money in Waimanalo so far on your visit here?” Those who answered in the affirmative were then asked, “About how much have you and other members of your personal group spent in Waimanalo so far on your visit here, including any pre-paid lodging deposits?” Since some respondents were intercepted toward the beginning, rather than the end, of their stays in the community, only those respondents who affirmed, in response to a separate query, that they would be “leaving Waimanalo within the next hour” were included in the derivation of estimates of visitor spending in the community.

On average, visitors to Waimanalo spent $3.31 per person per day, $6.61 per party per day, $9.94 per person per trip, and $19.87 per party per trip in the city (Figure 49). Visitor spending per party per trip averaged $7.99 for restaurants and bars, $3.14 for transient vacation rentals, $3.10 for groceries and take-out food, $1.17 for vehicle rental, $0.99 for gasoline and oil, $0.78 for equipment rental, $0.41 for entertainment, and $0.29 for attraction admission (Figure 50). On a percentage basis, 40.2% of visitor spending per party per trip was allocated to restaurants and
Figure 46. Waimanalo visitors' prioritization of tourism-related issues in the city

- Quality of the area's natural environment
- Security of my belongings
- Personal safety
- Cleanliness and appearance
- Friendliness of the local people
- Concentrate Here
- Level of crowding in parks and on sidewalks and beaches
- Lower Priority
- Amount of traffic on roads
- Customer service in shops and restaurants
- Lower Importance
- Possible Overkill
- Level of crowding in shops and restaurants

n = 354
Figure 47. Waimanalo visitors' perception of the likelihood of visiting again

- Very likely: 64.0%
- Likely: 23.4%
- Neither likely nor unlikely: 5.8%
- Unlikely: 1.7%
- Very unlikely: 5.1%

n = 414

Figure 48. Waimanalo visitors' perceptions of the likelihood of their recommending a visit to Waimanalo to someone they know

- Very likely: 64.1%
- Likely: 24.9%
- Neither likely nor unlikely: 5.9%
- Unlikely: 0.7%
- Very unlikely: 4.4%

n = 409
Figure 49. Mean levels of visitor spending in Waimanalo

Mean spending per party per trip: $19.87
Mean spending per person per trip: $9.94
Mean spending per party per day: $6.61
Mean spending per person per day: $3.31

Figure 50. Mean visitor spending in Waimanalo per party per trip, by spending category

Restaurants and bars: $7.99
Airbnb, Vrbo, or HomeAway: $3.14
Groceries and take out food: $3.10
Vehicle rental: $1.17
Gasoline and oil: $0.99
Equipment rental: $0.78
Entertainment: $0.41
Attraction admission: $0.29
All other purchases: $2.00

n = 62
bars, 15.8% was allocated to transient vacation rentals, and 15.6% was allocated to groceries and take-out food (Figure 51). Less than 11% was allocated to other spending categories.

Estimated Visitor Volume in Waimanalo

The same procedures used to estimate the volume of tourist visitation in Kailua/Lanikai were used to measure the volume of tourist visitation in Waimanalo. This again necessitated, for purposes of this estimation, adoption of the HTA’s narrower definition of a “visitor” as an adult who does not reside in Hawaiʻi. The estimation of visitor volume involved the following steps:

1. A special analysis by the HTA of data from their third quarter Visitor Satisfaction Study report (Anthology Marketing Group, n.d.) revealed that 7.9% of the tourists that stayed at least two days in Hawaiʻi stated that they visited “Waimanalo Beach Park” in July 2019.


3. The 7.9% of visitors who visited “Waimanalo Beach” in July 2019, multiplied by the 601,683 tourists who visited O‘ahu during July 2019, yielded **47,533** tourists who visited “Waimanalo Beach Park” in July 2019.

4. The 47,533 tourists who visited “Waimanalo Beach Park” in July 2019, divided by the 60.6% of our Waimanalo sample that indicated that they did so, yielded an estimated **78,437** tourists who visited Waimanalo in July 2019. To achieve comparability with the HTA results, Hawaiʻi residents and respondents who did not answer questions about whether they visited Waimanalo Beach Park (Question 17 in the questionnaire in Appendix H), were omitted from our sample in the computation of the 60.6% estimate, leaving a data base of 249 cases.

5. A reported 601,683 air visitors visited O‘ahu in July 2019 (HTA, 2020a) and 6,193,027 visited O‘ahu in 2019 as a whole (HTA, 2020b). Thus, in 2019 July visitation constituted 9.71% of annual visitation to O‘ahu. Assuming a similar percentage applies to visitors to Waimanalo, the estimated 78,437 persons who visited Waimanalo in July 2019, divided by 9.71%, yielded an estimate of **807,796 visitors** to Waimanalo in 2019 as a whole.

6. The estimated 807,796 persons who visited Waimanalo in 2019, multiplied by an average length of stay in Waimanalo of 1.5 days, computed from the survey data base in its entirety, yielded an estimate of **1,211,694 visitor-days** in Waimanalo in 2019.

7. These estimated **1,211,694 visitor-days**, divided by 365, yielded an annual average daily census of **3,320 visitors**. Thus, on any given day in 2019, on average about 3,320 visitors were present in Waimanalo.

8. The 9,961 persons comprising the 2018 resident population of Waimanalo (U.S. Bureau of the Census, 2020b, 2020c), plus the annual average daily census of 3,320 visitors, yields a **de**
Figure 51. Distribution of visitor spending in Waimanalo per party per trip across spending categories
Actual population of 13,281 persons. Therefore, the 3,320 visitors present in the community on any given day comprise (3,320/13,281) x 100 or 25.0% of all persons in the community. This estimate is an annual average; during periods in which tourist visitation is heavier or lighter than usual, visitors might comprise more or less than 25.0% of the persons present in Waimanalo on average. Nevertheless, the magnitude of the 25.0% annual average daily census helps to explain the level of concern that many residents have about tourism in their community.

Aggregate Direct Expenditures of Waimanalo Visitors

The same procedures used to estimate the aggregate direct expenditures of Kailua/Lanikai visitors were used to estimate the aggregate direct expenditures of Waimanalo visitors, which again necessitated, for purposes of this estimation, adoption of the HTA’s narrower definition of a “visitor” as an adult who does not reside in Hawai‘i. The generation of aggregate visitor expenditure estimates involved the following steps:

1. The same subsample of 249 respondents described in the preceding section contained 43 respondents who stated that they would be leaving Waimanalo within the next hour. Among these 43 respondents, mean expenditures per person per trip in July 2019 were $13.79.

2. The $13.79 in mean expenditures per person per trip, multiplied by the 78,437 tourists who visited Waimanalo in July 2019, estimated using procedures described in the preceding section, yielded $1,081,646 in estimated direct tourist expenditures in Waimanalo in July 2019.

3. The proportion of total 2019 tourist spending in Waimanalo that occurred in July 2019 was assumed to be the same as the proportion of total 2019 tourist spending on O‘ahu as a whole in July 2019. According to the HTA (2020a), total air visitor spending on O‘ahu in July 2019 was $764.6 million, and total air visitor spending on O‘ahu for 2019 as a whole was $8,192.5 million (HTA, 2020b). Thus, tourist spending on O‘ahu in July 2019 represented an estimated ($764.6 / $8,192.5) x 100 or 9.3% of total 2019 spending on O‘ahu.

4. The estimated $1,081,646 spent in Waimanalo by tourists in July 2019, divided by 9.3%, yielded an estimated $11.6 million in tourist spending in Waimanalo in 2019 as a whole. This is a conservative estimate because it does not account for the expenditures of Hawai‘i residents who visited Waimanalo or visitors who may have spent some additional dollars in the community during their last hour there. It represents 0.14% of the $8.2 billion in air visitor spending on O‘ahu in 2019 and 0.07% of the $17.7 billion in air visitor spending in the state as a whole in 2019 (HTA, 2020b).

The distribution of the estimated $11.6 million across spending categories was as follows. About $4.2 million was spent in restaurants and bars, $2.0 million was spent on transient vacation rentals, and $1.9 million was spent on groceries and take-out food. Significantly smaller amounts were spent on gasoline and oil ($617,000), vehicle rental ($732,000), equipment rental
(485,000), attraction admission (182,000), entertainment (257,000), and other purchases (1.2 million).

The $11.6 million estimate accounts only for the direct expenditures of tourists in Waimanalo; it is not an estimate of the total economic impact of tourism on the community because it does not account for the secondary impacts impelled by the direct expenditures. Because of the smallness of Waimanalo, estimating the secondary impacts of tourist spending in the community was not feasible, so only direct tourist expenditures were estimated. Secondary impacts are proportionate to the economic self-sufficiency of a study area. Given the lack of economic self-sufficiency in Waimanalo that is typical of most small island communities, the secondary economic impacts in Waimanalo are not likely to be a major component of the total economic impact of tourism on the community. Nevertheless, it should be understood that the total economic impact of tourism on Waimanalo is higher than the estimate of direct tourist expenditures reported above.

Comparisons of Results Across the Two Visitor Surveys

The results of the two visitor surveys revealed significant differences in the character of tourist visitation to Kailua/Lanikai and Waimanalo, despite the geographic proximity of these communities. Compared to Kailua/Lanikai, Waimanalo attracts a significantly higher proportion of visitors from other communities on Oʻahu: almost 41% of visitors to Waimanalo stated that they lived elsewhere on the island, compared to only 13.8% of visitors to Kailua/Lanikai. This helps to explain many other observed differences that pertain to the two visitor samples’ non-Hawaiʻi origins, use of information sources about the communities, types of transportation used to reach the communities, the use of accommodations, lengths of stay, and levels of spending. For example:

- Only 46.5% of the visitors to Waimanalo resided on the U.S. mainland, compared to 63.5% of visitors to Kailua/Lanikai. Moreover, only 0.2% of the visitors to Waimanalo were from Japan, compared to 5.0% of the visitors to Kailua/Lanikai.
- Over two-thirds (68.7%) of the visitors to Waimanalo stated that they discovered or learned more about Waimanalo from a “friend, relative, co-worker, etc.” while in Hawaiʻi, compared to 48.5% in the case of visitors to Kailua/Lanikai.
- The most frequently cited mode of transportation visitors used to reach Waimanalo was the respondent’s own vehicle, whereas the most frequently cited mode of transportation visitors used to reach Kailua/Lanikai was a rental vehicle.
- Only 8.1% of the visitors to Waimanalo stayed overnight in the city, compared to 25.5% of the visitors to Kailua/Lanikai. As a result, the average length of stay among Waimanalo visitors was 1.5 days, compared to 3.3 days among Kailua/Lanikai visitors.
- The absence of lodging expenditures among the significantly greater percentage of day visitors to Waimanalo, and the significantly lower length of stay among such visitors, compared to visitors to Kailua/Lanikai, contributed to the mean expenditures per party per trip of Waimanalo visitors being only $19.87, compared to $250.48 for Kailua/Lanikai visitors.

The number of visitors hosted by Kailua/Lanikai was estimated to be more than double that hosted by Waimanalo. However, due to the differing average lengths of stay among the two samples, more than four times as many visitor-days occurred in Kailua/Lanikai as in Waimanalo.
Yet, because Kailua/Lanikai’s resident population is about 3.68 times that of Waimanalo’s, the visitor presence in the two communities in relation to the surrounding resident population is about the same: on any given day, on average about 29.2% of the persons present in Kailua/Lanikai are visitors; the comparable percentage in the case of Waimanalo is 25.0%.

The significantly lower expenditures of visitors to Waimanalo compared to Kailua/Lanikai, combined with the significantly lower visitor volume in absolute terms, combined to yield significantly lower estimates of aggregate visitor spending in Waimanalo: about $11.6 million, compared to $116.2 million in Kailua/Lanikai.

Participation in outdoor recreation activities was generally similar across the two visitor samples. In particular, the top three activities were the same for both samples – swimming or wading in the ocean, sunbathing, and beach walking. The only difference of note was that body surfing/boogie boarding was more popular among Waimanalo visitors than among Kailua/Lanikai visitors.

No major differences in satisfaction levels or prioritization of tourism–related issues were observed across the two visitor samples, possibly resulting in similar percentages stating that they would be likely to visit again and recommend a visit to someone they knew.

Conclusions

Widespread concern about tourism exists among the residents of both Kailua/Lanikai and Waimanalo. In the case of each resident survey, over 65% of respondents agreed or strongly agreed that “tourism has increased traffic,” “tourism has increased the cost of living,” “tourism has destroyed the small town feel” of the city, “vacation rentals have reduced the availability of housing for locals,” “tourism has made transportation more difficult for locals,” and “government decisions on tourism issues tend to favor tourists over locals.” Likewise, in the case of each resident survey, over 65% of respondents felt “worried,” “irritated,” or “outraged” by “the presence of tourists” in their community. In addition, in the case of each survey, over 69% of respondents disagreed or strongly disagreed that their city “can handle more tourists.”

Tourism has both positive and negative economic, sociocultural, and environmental impacts in any destination, necessitating measurement of the perceived net impacts of tourism on the destination. In this study, such perceptions were measured by asking respondents to indicate the extent to which they agreed or disagreed with the statement, “Tourism has brought more benefits than problems.” In the case of each resident survey, no more than 25.3% agreed or strongly agreed with this statement, but at least 43.0% of respondents disagreed or strongly disagreed with it. This suggests that the number of respondents who felt that tourism had brought more problems than benefits exceeded the number who felt that tourism had brought more benefits than problems. On the other hand, in the case of each resident survey, about 32% of respondents neither agreed nor disagreed with the statement. This suggests that a substantial share of residents feel uncertain or conflicted about the net impacts of tourism on their city. Nevertheless, it is clear that widespread unhappiness about tourism exists in both communities.

In contrast to this widespread unhappiness with tourism among residents, visitors expressed broad satisfaction with their visits to the residents’ communities. The mean levels of satisfaction,
on a scale from 1 to 5, in which 1 represented “extremely dissatisfied” and 5 represented “extremely satisfied,” were above the midpoint of the scale for all 10 items about which visitors were queried, and above 4.2 overall. Presumably because of these high satisfaction levels, in the case of each visitor survey most respondents were repeat visitors, over 84% reported that it was “likely” or “very likely” that they would visit the city again, and over 88% reported that it was “likely” or “very likely” that they would recommend a visit to the city to someone they knew.

Visitor volume and expenditures were substantial in the case of both communities. In 2019, an estimated 1.7 million persons visited Kailua/Lanikai and 807,000 persons visited Waimanalo. Moreover, on any given day in 2019, on average about 15,161 visitors were present in Kailua/Lanikai, and on average about 3,320 visitors were present in Waimanalo. These visitors spent an estimated $116.2 million in Kailua/Lanikai and an estimated $11.6 million in Waimanalo. While these expenditures clearly contribute to the economic vitality of these communities, their perpetuation is threatened by residents’ negative attitudes toward tourism as documented above. Research has shown that if a community does not support tourism, through demonstrating unwelcoming behavior toward tourists or otherwise, visitation and associated expenditures will decline. Thus, ameliorating the negative social impacts of tourism felt by residents is critical to the long-term economic vitality and sustainability of tourism in both cities.

In the case of the Kailua/Lanikai visitor survey, among the various categories of visitor spending, both mean and aggregate levels of spending were highest in the case of transient vacation rentals. Indeed, 42.0% of the money Kailua/Lanikai visitors spent in the community was spent on this form of lodging. Moreover, 42.0% of the nights spent by visitors in Kailua/Lanikai were spent in Airbnbs, Vrbos, or Homeaways, second only to the number of nights spent in friends’ or relatives’ homes. These findings indicate that transient vacation rentals are a major component of tourism in Kailua/Lanikai that has increased the average daily census of visitors to the community. It is therefore especially important to wisely regulate and otherwise manage these enterprises in Kailua/Lanikai.

**Recommendations**

In a study of this type, the most important recommendations that can be made are those advanced by the survey respondents themselves. In the case of both resident surveys, respondents indicated that the following should be considered top priority issues:

- effective leadership to solve problems caused by tourism,
- negative effects of tourism on the natural environment,
- amount of traffic on roads as a result of tourism,
- negative effects of tourism on cleanliness and appearance,
- level of crowding in parks and on sidewalks and beaches as a result of tourism, and
- negative effects of tourism on the overall quality of life.

Respondents to both surveys also indicated that the most highly desired solutions to tourism-related problems in their communities were:

- improve maintenance and appearance of public restrooms at beach parks,
- pass stricter laws and penalties designed to shut down unlicensed tour operators,
• strictly enforce laws designed to shut down unlicensed tour operators,
• more strictly enforce rules controlling vacation rentals, and
• more heavily fine property owners who illegally operate vacation rentals.

Civic and government leaders, in collaboration with residents, would benefit from promptly responding to these views by facilitating better management of tourism in Kailua/Lanikai and Waimanalo. This will require development of tourism management plans for these communities, initiation of visitor education programs, improved maintenance of public facilities, stricter law enforcement, and strengthened legislation and regulation. Unless these initiatives are promptly undertaken, Kailua/Lanikai and Waimanalo may start to become less attractive to residents and tourists, harming both the local economy and residents’ quality of life.

Thus, Kailua and Waimanalo each stand at a crossroads with regard to its tourism. Each can either continue with the status quo or it can proactively improve the management of its tourism such that the benefits of tourism are optimized and more equitably distributed, and its costs are minimized. If it chooses the latter, the principal stakeholders in the community will need to be identified, organized, and charged with finding innovative ways to better manage tourism.

These efforts can be informed by both the research and the popular literature on tourism. Within the research literature, for example, Spotts and Mahoney (1991) found that one-third of the visitors to a destination region spent 78% of all the money visitors to the region spent, and that these “heavy spenders” could be identified based on their personal and trip characteristics. This suggests the potential value of identifying, targeting, and serving “heavy spenders” to maintain the community’s desired income from tourism but with fewer visitors. It further suggests that indicators of destination performance should not focus entirely on visitor numbers, but should also include measures of visitor impacts in terms of length of stay, spending, and activity intention (Oklevik et al., 2019).

Within the popular literature, useful insights can be gained from what other communities around the world have been doing to cope with heavy tourist visitation. For example, the City of Amsterdam has developed an app called “Discover the City” that sends timely notifications to potential visitors that certain attractions are more congested than usual and encourages them to visit other attractions (Ellwood, 2017). The Condé Nast Traveler Editors (2018) and Buckley (2020) provide many other excellent ideas for communities dealing with heavy tourist visitation.
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Appendix A

A Sampling of Kailua/Lanikai Resident Survey Respondents’ Written Comments About Tourism in Kailua/Lanikai
Appendix A

A Sampling of Kailua/Lanikai Resident Survey Respondents’ Written Comments About Tourism in Kailua/Lanikai

“In general tourist are well behaved and do not damage outdoor facilities. They provide businesses with much needed customers without which many could not survive in Kailua and their presence enables other businesses to open in Kailua which benefits the local population.”

“Tourism in Kailua is a huge problem. When local people can’t even utilize their own hometown beaches due to no parking. Then the huge amount of toxic sunscreen that they all wear. I am a fisherman of Kailua all my life and the tourism boom in Kailua has had significant negative effects on our ecosystem as the reefs are dead, and schools of fish that would combine in by the thousands annually in the summer have not shown up in Kailua Bay in over 25 years already. Tell me why these fish would all of a sudden stop coming into the Bay? The negative impact is huge and most people in Kailua work in town or somewhere else. Very few could work the majority of jobs in Kailua at min wage and still be able to live in Kailua. It’s just not financially possible. Tourism boost business to people who don’t even live here and aren’t giving anything back to the community. It shouldn’t be like this, ...I shouldn’t have to show up at the beach park before sunrise just to make sure I can get a parking space! Serious, even side streets they are taking our local stalls. There are always illegal tours going on with nobody fining anybody...Kailua is sad and it’s sad to see people leaving one by one...it’s just not fair...”

“I love having the tourists in our neighborhood. Occasionally, they are in the wrong lane or oblivious to their surroundings but I feel the same way in their countries...The real problem with vacation rentals is absentee landlords who rent to groups that are here to ‘party’ and have no respect for the neighbors. These should be banned. Otherwise, I have no problem with vacation rentals that are quiet, respectful and owner occupied. New permits should be allowed and encouraged...”

“STOP BUSINESSES AND HAWAI’I TOURISM AUTHORITY AND THE OTHER STATE ENTITIES FROM MAKING KAILUA/LANIKAI A TOURIST DESTINATION. There are other parts of the island to market tourism. Make our state government, mayor, HTA responsible for the negative impacts on Kailua/Lanikai residents’ quality of life. It’s ALREADY TOO CONGESTED. . . .”

“I welcome the tourists.....I often help them with directions....I spend a lot of time...several hours a week picking up trash with my dog. On the whole, trash is not caused by tourists....most of the trash is caused by homeless and inconsiderate locals....I pick up a lot of trash in parking lots bordering town sidewalks (homeless don’t drive cars)....so it’s not only homeless trashin our streets...I think more effort should be focused on homeless and less on tourists....”

“Tourist are overall rude and basically clueless. They feel it is okay to walk up on to your property and pick your flowers and take pictures. They do not share the sidewalks or the aisles in a store - they stand in groups at entrances making it impossible to enter or leave. The rules do not apply to them and no one will correct or ticket them. They leave rubbish on the beaches. I’d like to know when I consented to my street and home or town as a Tourist Stop - oh I did Not. As for
the shops and restaurants that are supporting tourism I do not frequent them and from all the complaints that came about after the Pali closed it appears that many other locals do not either.”

“Tourism brings improvements to Kailua or anywhere. Before the tourist Kailua was going downhill. There was no jobs for the kids so they had to try to get to town. The businesses were struggling. Now everything looks cleaner and modern in a chic way 😃. Tourism is clean and we were always taught to treat tourist with aloha because they are providing dollars in some way or another. I don’t like the foreign owned rentals that don’t spend their profits in Hawaii. I also want to express my support to have the bikes off the road on new pathways for pedestrians and bikes. I’ve submitted pictures to Ikaika Anderson. I pray I can ride a bike down Oneawa before I die 😃.”

“I was born and raised in Kailua. The increasing presence of tourists in Kailua has taken away from the charm and comfort of a small beach town. Beaches are no longer easily accessible, parking is extremely limited, traffic has become so congested that drivers are taking risks and losing their patience, tourists on bicycles are a huge safety issue for drivers, some restaurants are so busy that residents can’t get in. In addition, home owners have stopped renting to locals in hopes of making more money on opening Airbnbs. I’ve known several families that had their “leases” suddenly canceled and forced to move. Only to find out that the owner was now renting to tourists. The housing shortage is a major issue island wide, as is affordable housing.”

“My impression is that Kailua has a rather vocal minority who are hyper critical of Alexander and Baldwin, the state of Hawaii, the city council, the elected officials for this community. Lot of knee jerk criticism from folks who don't want to or can't accept change. I do think the vacation rental problem genuine and should have been solved a long time ago, if there were effective government leaders.”

“As a local homeowner in Kailua for 41 years...tourism is completely out of control in Kailua/Lanikai. Extremely difficult to navigate through all the traffic & dazed tourists that are dropped off by the bus loads after their long flight usually from Japan, while waiting for their hotel rooms in Waikiki to become available. The locals are being squeezed out of our home town for the tourist $$ instead of preserving our natural resources for our grandchildren. Our politicians & government should be ashamed!! Simply awful!!”

“The tourist are a main part of the economic flow here on the island and have been for many years.”

“Stop bringing in so many buses to Kailua!!!”

“Tourism is good for Kailua/Lanikai and we should work hard to extend the 'aloha spirit', educate, and embrace conscious tourism.”

“I am extremely irritated with the bicycle rentals here. The foreign tourists are uneducated about our traffic laws and ride their bikes on the sidewalks, even the battery-operated ones. I live in Kailua town and walk and the cyclists are a hazard. Pedestrians should not have to share the sidewalk with cyclists and skateboarders. HPD should have foot patrols in Kailua town. A year or so ago I was standing at a crosswalk and a tourist whizzed around the corner and ran into a stroller with a toddler in it. Fortunately, the child was unhurt. They should not be riding on the sidewalk. The companies that rent need to ensure their clients understand our traffic laws.
However, I would not ride a bike on these roads. **WE NEED BIKE LANES.** And then there's the homeless, but that's another issue!”

“There are marked improvements to Kailua over the past several years with improved bike lanes, restaurants and stores. Even though I really do miss Don Quioxte. Tourists bring in additional income to the community and encourage improvements. Recommend the street leading down to Kailua Beach Park, Kailua road the part with all the ironwood trees be improved. That road should be repaved and widened to include dedicated bike lane. The sidewalk should be improved and cemented instead of ‘lumpy asphalt’”

“It’s a double edged sword, no one should be penalized for wanting to visit our beautiful islands, but at the same time the erosion of land and quality of life for all suffers due to the greedy, those who are only for profit. You can see it in the cost of living in Hawaii.”

“There is a vocal minority that want to keep all tourists out of Kailua. There are whole-house vacation rentals with no owner or manager present that give all short term rentals (including mom and pop B&Bs) a bad name. Weed out the problem short term rentals and manage the tours. Tourism is good for Lanikai Kailua as it has created thousands of well paying jobs, and given us lots of new restaurants and stores. Make downtown Kailua a pedestrian mall; design protected bike lanes (and educate the tourists on our road rules before renting e-bikes and regular bikes to them); make Kalaheo Ave one way with a wide sidewalk, bike path and parking. Make it a true “beach road.” Make Kinaanu one way in the opposite direction. Don’t allow kayak rentals to tourists on weekends and holidays (no place for locals to park their kayak on Flat Island). Provide more beach and hiking trail access and parking so everyone-not just Kailuans-can enjoy the beach and our beautiful hikes.”

“Stop bringing tour buses in, let them use public transport if they want to see Kailua/Lanikai, same goes for small private tour transport operators. **Lets actually see the tax income put to good use in our town....seems like most of the money made here doesn't stay here!**

“There is a way to balance the quality of living for locals and tourism. My experience is that tourism allows locals more opportunity to start businesses and employ people. If you do not have a thriving visitor base, whether from military spending or tourism, people do not spend $ to make Kailua a thriving little city. Young people will feel the need to leave Hawaii in order to have a future (aka brain drain) and tourism and non-locals would overtake Kailua eventually if we cannot retain the people who grew up here. Thanks!”

“We don’t want any new building, shops, restaurants. Maintain what we have and keep it clean and safe. Tourism should be in Waikiki NOT in our small beach town where locals live. I work for HPH and make a good living but can not afford the prices that tourism is costing! It is driving the prices up in our stores and rent and restaurants. Soon all the locals will move away and only tourists will be here and do not have our values.”

“We should feel fortunate we have visitors come to Kailua/Lanikai. In the past 10-12 years, we have had a welcome increase in great restaurants, retail and more money coming in to economically help our community than would ever come in from our local residents. We should also feel fortunate that the demographics of the majority of our tourists are extremely polite and respectful. I resent the feeling many residents have that as soon as they move to Kailua/Lanikai,
the borders should be closed off to anyone else. The real problem lies with the crack addicts that sleep on the streets and harass tourists and locals alike. That is the real blight.”

“Kailua is a residential area, not a tourist destination. Buses should be banned from bringing tourists into Kailua. Bike rental shops for tourists should be stopped. Kailua is (used to be a small quiet safe town) a residential town, we should not be building bike lanes for tourists or accommodating for more visitors in any way. One used to be able to drive through Kailua Town without an issue, now it is a big headache with all the tourists to get anywhere. Kailua is losing its charm and quaintness because of the over population of visitors being dropped off by buses. Kailua is now attracting more crime because of the tourists. Kayaking tours to Flat Island needs to be stopped, tourists are ruining the environment, the island, the sea life, and the bird life on the island and all around. Kailua is not and should not be a tourist destination. It is a residential area for locals to live quietly and safely. Accommodations for tourists should not be made, not bike lanes which interfere with our already crowded streets and lanes, not sidewalks (keep it natural), and definitely no more parking lots. We don't need the fumes, pollution, or any more destruction of the environment. Tourists and the businesses attached to tourism need to be kept out of Kailua!”

“I have been a full time resident of Kailua for more than half my life. I was born at Castle Medical Center. I love this town and am probably one of the few locals who welcome the change tourism has brought. Kailua town is more vibrant and alive and there’s so much more to do now. More shops, more restaurants, which equals more spending. Which is great for our economy. I’ve never once had any problems with tourists, and I run all my errands in Kailua Town. As for traffic, there’s going to be traffic regardless so it doesn’t bother me at all and I work in Honolulu. As for cleanliness, sorry to say but the local homeless are the ones making public and park restrooms unclean. The uncleanness has nothing to do with tourists. As for housing, it was hard to find affordable housing here before tourism increased and it will still be hard if it stops. We live in Hawaii it’s expensive to live here this has nothing to do with tourism. Funny thing is most Kailua residents who are complaining about all this tourism aren’t even from here, and most already have housing. The only reason I’m in Kailua is because my partner and I both have two jobs so we can afford to live on our own and guess what we’d still have to do that even if tourism in Kailua decreases. Though it’s hard for some Kailua residents to accept they need to understand what tourism does for our economy. These vacation rentals bring tourists to stay in our little town, these tourists then spend money in our little town. Vacation rentals keep homes occupied, in a town where homes are ridiculously overpriced. They provide jobs, from the people that clean these vacation rentals, to the people who clean the pools at these vacation rentals, to the people who do yard work at these vacation rentals, etc. And guess what all these people are locals, these vacation rentals are more than just a rental. They help local people by providing jobs. This effects them tremendously. People in Kailua and all of Hawaii.”

“Tourism is a problem in Kailua that has hindered the local families in Kailua. On countless occasions I cannot access local beach parking due to the limited parking spots available and when I do, I have to wait to become extremely lucky to get one. I've waited over 2 hours to park at Kailua beach before and by the time I parked my family had gotten out swam and packed and was ready to leave because it was too crowded. I pick up trash left all over the street every time I am walking with my family and tourist usually walks over it or doesn’t bother picking it up even though there are trash cans near by. I’ve personally visited Asia and know first hand of there traffic laws and how they drive on the other side of the road on the other side of the car (I have
both a Japan and Korean drivers license) as I was stationed there with the military. Tourist to Hawaii obviously don’t know our traffic laws and drive wild or just simply don’t know. Training on our traffic laws would greatly decrease the amount of traffic and accidents that happen in Kailua and Hawaii in general. I am Hawaiian and was born and raised in Hawaii. I, like most locals have been forced to leave Hawaii as the cost of living and tourist returning back to Hawaii to purchase a home/condo has driven the prices up so high that I cannot live in my own home state no more. More specifically, a house I recently looked to purchase in Kailua (3 bed, 1 1/2 bath 1239 square feet, no back yard or front yard home was 879,000 with a monthly payment of 5,200. If I was a doctor or something I could afford that but let's be honest here. That is not a realistic expectation for locals to afford. So we are left with section 8, homeless living on the beach or 10 people in 1 house renting... this survey only makes me realize that locals are slowly becoming extinct. At least the Indian people were taken care off when they lost their land. . .”

“Tourism is necessary to our economies, and like all resources needs to be managed. Locals do not have a right to exclude for the sake of hording their slice of paradise. Tourist need to be educated on what is pono. Locals are as big a problem on environmental impact, cleanliness and sense of entitlement as "tourist" are. I do not support ideas that nickel and Dime tax so called tourist. I do not support many of the taxes already leveed in the name of tourism, epically when there is no follow up as to what the money is used for the improvements made. The tax goes to the black box and used somewhere else.”

“It’s becoming too crowded for locals. Local people are being priced out of their homes. Tourists are causing major traffic and unsafe traffic conditions, but not following the rules of the road (especially the Japanese) dangerous on bikes!”
Appendix B

A Sampling of Waimanalo Resident Survey Respondents’ Written Comments About Tourism in Waimanalo
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A Sampling of Waimanalo Resident Survey Respondents’ Written Comments About Tourism in Waimanalo

“Tourism is an important benefit for our community. It helps keep jobs for our community. Tourism does not affect our traffic. Traffic is from local people on our island. To me traffic by tourist is only 15% out of 100% 85% of traffic is by our island people. Road work and Riggs and dump trucks by commercial business should be stopped to limit traffic congestions. Mopeds and bicycles are no problem. The problem is 75% of moped problems are from locals with ‘stolen’ mopeds. As far as public facility, Sherwood forest will be a good addition for the public. It needs to be started and finished asap.”

“There should be a cap on the amount of tourists allowed to visit the Islands annually. They disregard posts and warning signs that are there for their safety, yet we pay for emergency rescue when they need it. They go down close to the ocean near blowhole and Lanai lookout without thinking. They should be fined if emergency personnel, firefighter boat rescue, lifeguards, ems, need to be called because they ignore posted warning signs. Let them pay the bill and not our taxpayers. Keep tourists in hotels and let islanders live in their homes. Set the minimum stay for vacation rentals 30 days and make a law that rentals cannot offer refunds if their renters if they cancel before 30 days, as this is a way out for vacation rentals, to get around the 30 day minimum stay. Please take some control of this tourism that is getting out of control. Waimanalo is seeing overflow from Kailua already!”

“Tourism definitely helps the local economy and Waimanalo. Proper regulation and enforcement of tour buses and tourist related activities is important.”

“Tourism is a huge problem. Seems like government is out for the mega dollar and not concerned about the native people of Hawaii and all of its natural resources. Should protect and sustain what we have left in Hawaii nei. Stop building and maintain what we have first. Tax outsiders who want to invest into Hawaii. Allow Native Hawaiians the right to their land and to make decisions for their ‘aina and sacred lands. Native Hawaiians and Kanaka Maoli should have tax free discounts and land distributed to them. Stop development at Sherwoods. KU KIA‘I MAUNA a ALOHA ‘AINA”

“PLEASE ALLOW MORE VACATION RENTAL PERMITS!”

“Expanding our small town to accommodate the growing needs of tourism and population will take away the culture and beauty of Waimanalo. The continued expansion of roads and added parks and recreation is killing our community! Take care of what we have instead of trying to expand unnecessary and we lose the land, wildlife and culture that defines its community.”

“Tourism helps the economy and has kept small business open in the expensive lease area. It is the mainland transplants who complain about everything because they are stereotypical and are rude and not aloha by nature. Foreigners are more aloha than mainland tourists who buy properties and expect everything. They are the only ones making the noise and the politicians listen to them.”
“Beaches we went to as kids are so crowded now that it is no longer a joy to go, so we don’t. The Bus's that come through and into Kailua are absolutely crazy. So many of the tourists do not pay attention to our traffic laws and have almost hit and been hit by their distracted driving. Local people needs need to be priority.”

“My thoughts are why hasn't someone put together a Waimanalo Luau? By utilizing the talent in Waimanalo in conjunction with the unused Waimanalo dairy and the natural beauty of Waimanalo, one would be able to create local jobs and manage much of the tourist, all the while using a proven business i.e.: Pacific Cultural Center, to get them to start an economic boom in Waimanalo.”

“We have had enough!!! Tourism is creating problems statewide and we are being priced out of our own homelands while our (fake) State caters to foreign investors, tourism and corporate businesses. If something serious isn't done soon, Hawaii will be lost!!! The mayor’s plan to create problems for our community and more traffic for us who live here in Waimanalo.”

“Waimanalo doesn’t have a tourist problem, however we have a chronic drug and homeless problem! Why the hell are we talking about tourism. Tourism provides jobs and helps our communities put food on their tables. Please leave tourism alone to flourish and feed our ohawa. Government, the non producers in society or economy are making life more difficult. Homeless already crowd sidewalks. There really none to speak of. Locals trash environment already.”

“There are TOO many tourists now. I anticipate interaction problems if not regulated. Example; High speed 4x4 on the beaches. Trash and illegally parking anywhere not permitted. Traffic CONGESTED and backed up with numerous delays. Traffic starts from Enchanted Lakes on the west and on numerous occasions from Kainia Beach on the east. I welcome tourist but the volume today will impact our environment and community negatively.”

“How would you feel if California banned you from going to Disney?”

“Tourist have no respect for our way and culture and customs. They should be more respective. They should learn to clean up there ‘opala’ after leaving our beaches and parks. If they come to visit - visit with respect don't demean us because of our looks or speech. They should learn the meaning of "aloha" before ever visiting Hawaii.”

“I believe it helps our community’s economy very much. We also have a chance to show tourists who we are and instill our values in them.”

“I am surrounded by vacation rentals. This is supposed to be a residential neighborhood. Many of my neighbors are gone due to increased rent.”

“Of all the problems Waimanalo has, tourism is not one of them. Visitors could hardly contribute a fraction of what locals do to the negative image of Waimanalo. There are numerous homeless villages in the bushes & beaches which are filled w/ drug use and prostitution. Dozens of abandoned cars litter the roadside and local characters rove the streets, high or vaping. Bathrooms in parks are broken and scary as the serve as a hub, oftentimes, for crime. Have you seen them lately? They are worse than a third world country (but that would insult 3rd world countries). They are hideous so much attention is given to the “problem” of tourism but they bring money to our economy. The worst they do is get sunburned or drive slowly. They don’t contribute to the crime, drugs, prostitution, homelessness, abandoned cars and other visual blight
that our wonderful residents provide. We have a culture problem in Waimanalo which is unrelated to tourism. Tourists don’t break into cars, pick fights or harass you for money @ 7-11. Tourists don’t drive on the grass at parks w/ their flags upside down. Tourist don’t turn tricks in the bushes and then protest when the bushes might be made a park for the kids. Tourists don’t camp illegally. Waimanalo has its own problems so let’s not blame the tourists for our own mess.”

“I’m very UPSET & VERY ANGRY with TRAFFIC at ALL HOURS OF THE DAY/NIGHT OF THE WEEK ALL YEAR LONG!!! The Total DISRESPECT of OUR Beaches, Mountain Trails, Our OCEANS & EVERYTHING in between!!! These TOUR BUSSES (LICENSES & NON-LICENSES) & TOURISM IN GENERAL (Tourists) DISRESPECTS and POLLUTE OUR AINA and THERE ALL FOR PROFIT, SELFISH and CONTINUALLY DISRESPECTFUL and ALWAYS WANT MORE & NEVER SATISFIED!!! SAVE SHERWOOD FOREST!!! SAVE OUR FORESTS, OCEANS & MOUNTAINS FROM BEING ANOTHER TOURIST DESTINATION DESECRATION!!!!”

“Waimanalo is a beautiful place. Tourists are welcome here but let them be aware of environment and safety of the place.”

“I am very unhappy about tour companies bringing van loads of tourist to Waimanalo beaches. If tourist venture out on their own to see our island that’s fine but for tour companies to fill our beaches with tourist is horrible. We see what happened to Kailua and don’t want that for Waimanalo. Waimanalo is a small town, too small for all those tourist. We want Waimanalo to stay our quiet country town. I’m sure tourists who come on their own appreciate it. Our mayor wants to turn Oahu into one big Waikiki.”

“Tourism could be a boom if well-regulated and efficiently managed. Ask the local citizens how, where tourist developments should occur. Locals are proud of the atmosphere of "our country". Keep things simple and quiet and friendly. I wish you the best- get friendly with the locals and ask their "ideas" of allowing tourists to enjoy our resources. What do you have to offer Waimanalo + its citizens in return for bringing tourism here? Ooops! Is this "quid pro quo"? Traffic is the worst here especially on weekends. Good luck!!”

“Waimanalo has a small town appeal. It has the natural beauty of the mountains and the sea. People that visit seem to want to take advantage of this natural beauty but they don’t seem to truly appreciate the NATURAL wonder of everything. I don't mind occasional tourists or small families or groups. What I strongly object to are tour buses of any size. I particularly despise the LARGE buses. They do not belong here in Waimanalo. Case in point: I went down to the little shopping center to get breakfast plate lunch on a Saturday morning. I was told to move my vehicle from in front of my plate lunch place to make room for a tourist bus. I was not even asked nicely, they were demanding about it!! This is MY neighborhood and some are unfamiliar to me (I'm sure they don't live in Waimanalo) told me to move my vehicle! xxxxWE! I've seen what has happened in Kailua and how it went from small town appeal to totally overrun, traffic congestion, people everywhere etc. It is not pleasant for me to go there if I don't have to. I now go to Hawaii Kai if I have shopping needs. I would hate for this to happen in Waimanalo!!”
“I have not had any problems with tourist. I extend the Aloha spirit where ever I go and to whomever I meet. No problems with tourist or tourism. We as natives to this land should always extend our Aloha.”

“Waimanalo still has a small town feel. We have too many bicyclists on our highway and side streets slowing the traffic even more especially on weekends.”

“Tourism is a huge part of our economy. Tourists should be aware that they’re visitors to someone's home and respect that. I welcome visitors and don't mind sharing the vast beauty of out town. Respect the land and the people who call Waimanalo home. We have much to share and offer to our guests.”

“The tourism issue is overwhelming. The traffic is out of control! The beaches are overcrowded and consumed by tourists. They (tourists) litter and smoke cigarettes and throw their cigarette butts in the sand. They are loud and disrespectful (most of them). It needs to be changed or controlled. Too Much TENSION!!”

“I believe tourism is necessary. For the economy of Hawaii and Waimanalo is known for its scenery, Sea Life Park, ocean of beauty. We need to share this with the world as we would want the world to share their beauty with us. But there is a limit to overdo or over-expand... Waimanalo is a small quaint town and it should be preserved and not encourage more traffic + congestion.”
Appendix C

A Sampling of Kailua/Lanikai Visitor Survey Respondents’ Written Comments About Their Visits to Kailua/Lanikai
Appendix C

A Sampling of Kailua/Lanikai Visitor Survey Respondents’ Written Comments About Their Visits to Kailua/Lanikai

At the end of the questionnaire, respondents were presented with an optional item that read, “Please use this space to provide any comments you may wish to make about your visit to Kailua/Lanikai and/or what should be done to provide higher quality experiences for visitors to Kailua/Lanikai.” A sampling of the comments received is provided below.

“This is my favorite beach on the island. This is my 12th visit to the island. I notice it’s more crowded than it was in my last visit & there is more plastic pieces (photo degraded bottle tops) that have washed ashore than in the past. I love the natural setting here & how pretty the beach is, in general.”

“We would have liked to visit Lanikai but were scared off by the homeless tents & lack of parking. We spent our time at Kailua beach.”

“Lanikai/Kailua is an overall amazing place to visit! Everyone is super friendly and accommodating! The atmosphere and environment is breathtaking! I can't wait to return again. This was our second visit to the same place=)”

“We typically visit Lanikai beach to escape the crowds on Waikiki.”

“Clean the beaches. Too much plastic.”

“Big motorcoaches don’t belong in Kailua. Small groups coming to the beach park are okay, but the segways+bicycles can be difficult to manoeuver around. It’s a residential neighborhood, not a tourist destination w/ hotels + the infrastructure that that provides (that’s what Waikiki is for). It’s a bit like ‘Keep the Country Country’”

“We chose this beach because we’re traveling with a 6 year old...weak swimmer who loves to play in the water. We were not disappointed! Will definitely recommend to friends here. Posted to FB!”

“Do not allow tourist buses in the area!”

“I would like to see more trash cans available to the public so less trash ends up in the ocean and on the beach. :)”

“We come here 6 months a year to kite, surf, sup and enjoy island like - the culture, the fresh market foods. We spend more time outside then inside. The kite beach has worked hard to have rules and make sure everyone follows them. Better signage is still needed.”

“Additional parking would be better instead of having to park in residential areas.”

“The beach is pretty and looks clean. The parking is inadequate and the amount of dogs off leash..... People on the beach seems respectful... Oahu in general seems to have too much big bus/large group tourism. I did not see many busses here. I do not think I would ever come on the weekend!”
“There's no easy way in without your own transportation. Hard to find parking. In the residential area, I understand the neighbors might be tired of the traffic flow, but there are more big rocks than usual on the streets so is not possible to park almost anywhere in Lanikai.”

“*Less micro plastics at the beach. *It would be more comfortable if the local people around this beach remove the rocks from the street. So we can park the car in the street. *It's super difficult to come to Kailua/Lanikai by public transportation.”

“I was surprised at seeing so many homeless residents.”

“Time to get rid of Air b+b. Time to restrict the tour buses, too.”

“We heard that short term rentals will be unavailable starting Aug. 1 from personal rentals like Airbnb. This is our primary source of finding rentals wherever we travel, and do not like the "hotel" experience. We hope that Hawaii is able to come up with a solution that allows for tourism as well as protects local residential needs. We hope that retail sales from a tourism decline does not significantly affect the local economy. I imagine there will be a backlash in the coming months/years to find a better solution than the current ordinance.”

“I have family living here so I come often. I’m not so happy with all the tourist buses from Honolulu. It’s so beautiful here. The beaches are incredible. I'm concerned they may become too crowded and not kept clean and pristine.”

“This is our 4th visit to this area and love it. Kailua needs tourism to keep the local people employed. Obviously there needs to be a level at where accommodation is too expensive for tourists to afford. We love this side of the island and would not stay in Waikiki. We also visited Maui 2 years ago. But did not feel the closeness of people and the Aloha spirit.”
Appendix D

A Sampling of Waimanalo Visitor Survey Respondents’ Written Comments About Their Visits to Waimanalo
Appendix D

A Sampling of Waimanalo Visitor Survey Respondents’ Written Comments About Their Visits to Waimanalo

“I’m very saddened to see the amount of trash and disrespect happening in this town and beaches some coming from the growing homeless population but also from the tourist renting all the homes taken over as Vrbs. Also their plans for Sherwoods is met with mixed emotions. As a previous local, this is our go to spot and we spend most of our beach time here. I would like to protect the local population as well as improve the safety and security here.”

“I live in Kailua which has become a madhouse of tourist. I am visiting the beaches in Waimanalo because it is less crowded. I don't see any kama‘aina here, mostly tourist which seem to pick up after themselves so I cannot complain. We come here so my daughter and friend could bodyboard without the worry of people dropping in their wave.”

“We go a little further north to avoid the tent city at the beach park. This is our favorite beach on Oahu. The beach itself can be very dirty if storms or flooding have occurred recently. Personal security & the security of my items are my main concern here. Nothing scary has ever happened, but having the tent city in the beach park is unsettling, but I have never had a negative or frightening experience here. We always spend several days at this beach when we're here.”

“I respect all people, locals, tourist, etc. There needs to be some sort of compromise between locals and the tourist industry. As a native born and raised here, I am starting to see a lot of overcrowded, over populated, disrespected use of our aina. The tourist industry is taking over with no regard of rules and regulations and sometimes ignoring how the locals feel. Pretty soon Oahu will be run over by rich foreigners, driving out the Hawaiian people, and it breaks my heart. But I guess this kind of problem is much bigger than what this survey is about.”

“I would be willing to pay for parking, beach access, camping pass etc. In the Hamptons in New York, we pay $50 dollars a car for the best beaches. This place is great. The money should get to help homeless. I also wish there was place to donate my umbrellas.”

“Everything is very expensive for low quality. The land is very nice and very well taken care of.”

“Leave it alone, keep it remote and non-commercial.”

“Less development and pollution, and stopping mass tent-city homelessness.”

“-difficult to find accommodation online. -lack of food, drinks near parking. -extremely beautiful nature.”

“Hawaii survives because of tourism, but it's a fine balance to keep the local people happy and not having huge developments occur in this sleepy town. There is small crime everywhere you have tourist. Hard to diminish. We don’t all want to go to a beach that has all the amenities. If you want a beach w/ all the necessities, you can go to Waikiki or Ala Moana. I think Waimanalo should be left the way it is. Perhaps let the local community open small shops and restaurant by small business owners. This way the community has passion and love about their home. We don’t need more tourists here if not necessary. Let’s support the people that live here with tourism $. We like it quite like it is today.”
“Waimanalo should not be a tourist destination. The overcrowding of the island is becoming a problem and we want to keep Waimanalo sacred and clean. The parking on the weekends is becoming a problem due to more tourist coming to the island. Waimanalo should stay the way it is.”

“Pluses: beautiful location, wonderful family holiday, off-the-beaten track, not so tourist, gorgeous beaches. Minuses: would love for more sustainable, non-plastic options, sad to see so much plastic on beaches, Hawaii could be the sustainable jewel of the US.”

“Clearing out homeless would be nice step. 3 or 4 years ago we had 4 backpacks stolen while we slept in tents. Not building new recreation center would be great. Money would be much better spent rehabbing the existing rec center. New center will be run down just like the old center within 5 years. Increased traffic will be a disaster. I feel bad for locals who will have to deal with that on a daily basis.”

“Please keep the tourist away! The tour buses also! I hate Kailua beach because of those reasons. Keep Waimanalo for the locals! My son grew up at this beach! Love Nalo! Mahalo!”

“Extremely want to keep Sherwood forest the way it is with no building. Don’t want Waimanalo beach exploited like Kailua and Lanikai have been. We live there but choose Waimanalo for crowds and cleaner water.”

“I live in Kaneohe and I prefer Waimanalo to Lanikai because the parking is much better and the beach is bigger and usually less crowded. I also like the fact that there are services here like Lanikai.”

“We were just commenting about how Sherwood’s is getting more and more crowded compared to just a few years ago. We locals like to come here, but hope it doesn’t get much more crowded. We like the feel it here now w/o too much tourist.”

“We’re staying in Kailua for a family reunion and have enjoyed coming to the “wave” beach as the kids call it. Beautiful scenery, very little rubbish on beaches, not too crowded. Have very much enjoyed our say here.”

“Waimanalo is one of the most beautiful and peaceful places I’ve ever had the pleasure of seeing. Keep it country, listen to the folks who have lived here for generations. Foster respect in your communication with tourist and residents alike. Preserve the natural beauty of their place as much as possible. Urge financial institutions to invest in local business and revitalize the retail shops in town!! (Waimanalo town)”

“I love it because there weren’t a lot of people. One of my friends from Portland, or wants to get married here because it is super gorgeous. Perfect for wave jumping.”

“Beautiful beach. Not very crowded, lifeguards available, bathrooms and large parking lot.”

“I love this beach. Plastic debris is a problem (here as with most places on the windward side) but due to the size not easy to pick up.”

“Beautiful area, some of local shops look very run down and in need of some clean up/maintenance.”
“The homeless presence is concerning and the history of Sherwood Forest is troubling.”

“I love Waimanalo. My family loves it. What I do not love is the plans to destroy our local Sherwood forest. My keiki play there. We need our trees. I also would love to have more regular beach clean ups.”

“Need more places to go in Waimanalo better maintain/update public restrooms homeless camps along roadway are unsightly and cause of concern for safety Waimanalo is a beautiful area and has some of the best beaches. Would like to see/have more local restaurants and shops the area could benefit from more tourism and the revenue but it is a delicate balance between more tourist and $ and keeping the area from becoming overcrowded, such as what has happened in Lanikai.”
Appendix E

Kailua/Lanikai Resident Survey Questionnaire
1. Please tell us how much you agree or disagree with each of the following statements about tourism in Kailua/Lanikai (as opposed to elsewhere in Hawaii or Hawaii in general). Please provide only one response for each statement.

<table>
<thead>
<tr>
<th>Statement About Tourism in Kailua/Lanikai</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree Nor Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism has increased traffic.</td>
<td>[ ]</td>
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<tr>
<td>Tourism has created good-paying jobs.</td>
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<tr>
<td>Tourism has benefited only a few people.</td>
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<tr>
<td>Tourism has improved the standard of living.</td>
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<tr>
<td>Tourism has increased the cost of living.</td>
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<tr>
<td>Tourism has improved shopping, dining, and entertainment opportunities for locals.</td>
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<td>Tourism has increased crime.</td>
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<tr>
<td>Tourism has helped to preserve the natural environment in the area.</td>
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<tr>
<td>Vacation rentals have reduced the availability of housing for locals.</td>
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<tr>
<td>Vacation rentals have reduced peace and quiet in neighborhoods.</td>
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<tr>
<td>Tourism has made it more difficult for locals to participate in outdoor recreation.</td>
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<tr>
<td>Tourism has made transportation more difficult for locals.</td>
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<tr>
<td>Tourism has destroyed the small town feel of Kailua/Lanikai.</td>
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<tr>
<td>Tourism has reduced locals’ access to restaurants, shops, and recreation areas.</td>
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<tr>
<td>Government decisions on tourism issues tend to favor tourists over locals.</td>
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<tr>
<td>Tourism has brought more benefits than problems.</td>
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<tr>
<td>Existing tourism has lowered the overall quality of life.</td>
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<tr>
<td>Increased tourism would lower the overall quality of life.</td>
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</tbody>
</table>
2. Some potential solutions to tourism-related problems in Kailua/Lanikai are described below. Please indicate how desirable or undesirable each potential solution would be for you. Please provide only one response for each statement.

<table>
<thead>
<tr>
<th>PROPOSED SOLUTION</th>
<th>Very Undesirable</th>
<th>Un-desirable</th>
<th>Neutral</th>
<th>Desirable</th>
<th>Very Desirable</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAFFIC IN KAILUA/LANIKAI</td>
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<tr>
<td>Implement an electronic “e-toll” on all rental cars and tour buses entering Kailua. (Vehicles would not have to stop to pay the toll.)</td>
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<tr>
<td>Make downtown Kailua a pedestrian mall with parking within walking distance.</td>
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<tr>
<td>Pass stricter laws and penalties designed to shut down unlicensed tour operators.</td>
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<tr>
<td>Strictly enforce laws designed to shut down unlicensed tour operators.</td>
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<tr>
<td>Do not allow tour buses to enter Kailua on weekends.</td>
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<tr>
<td>PROPOSED SOLUTION</td>
<td>Very Undesirable</td>
<td>Un-desirable</td>
<td>Neutral</td>
<td>Desirable</td>
<td>Very Desirable</td>
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<tr>
<td><strong>SAFETY IN KAILUA/LANIKAI</strong></td>
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<tr>
<td>Require all foreigners renting motor vehicles to watch a driver safety video.</td>
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<tr>
<td>Require all tourists renting bicycles to watch a bicycle safety video.</td>
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<tr>
<td>Strictly enforce and penalize bicycling violations.</td>
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<tr>
<td>Create a paved bicycle/pedestrian pathway, with separate lanes for bicyclists and pedestrians.</td>
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<tr>
<td><strong>VACATION RENTALS SUCH AS AIRBNBS IN KAILUA/LANIKAI</strong></td>
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<td>Pass new rules to tax vacation rentals.</td>
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<td>More strictly enforce rules controlling vacation rentals.</td>
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<tr>
<td>More heavily fine property owners who illegally operate vacation rentals.</td>
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<tr>
<td>Cap the number of nights per year that home owners can rent their properties to tourists.</td>
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<tr>
<td>More strictly regulate vacation rentals.</td>
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<tr>
<td><strong>PUBLIC FACILITIES IN KAILUA/LANIKAI</strong></td>
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<tr>
<td>Expand the capacity of parking at beach parks.</td>
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<tr>
<td>Improve the design and appearance of parking lots at beach parks.</td>
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<tr>
<td>Expand the capacity of public restrooms at beach parks.</td>
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<tr>
<td>Improve maintenance and cleanliness of public restrooms at beach parks.</td>
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<tr>
<td><strong>CONGESTION IN KAILUA/LANIKAI</strong></td>
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<tr>
<td>Reduce marketing of Kailua/Lanikai as a tourist destination.</td>
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<tr>
<td>Encourage tourists to visit less congested areas on Oahu through a smart phone app that would provide real-time information on congestion levels across the island and discounts at businesses in less congested areas.</td>
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</tbody>
</table>
3. Which of the following best describes how much contact you have with tourists in Kailua/Lanikai?

<table>
<thead>
<tr>
<th>No contact with tourists at all</th>
<th>Rare, unplanned contact with tourists</th>
<th>Occasional, unplanned contact with tourists</th>
<th>Occasional, planned contact with tourists</th>
<th>Frequent, unplanned contact with tourists</th>
<th>Frequent, deliberate contact with tourists as part of my work</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

4. Listed below are some tourism management issues in Kailua/Lanikai (as opposed to elsewhere in Hawaii or Hawaii in general). For each one, please indicate how important or unimportant this issue is to you.

<table>
<thead>
<tr>
<th>TOURISM MANAGEMENT ISSUE IN KAILUA/LANIKAI</th>
<th>HOW IMPORTANT IS THIS TO YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not At All Important</td>
</tr>
<tr>
<td>Negative effects of vacation rentals.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Economic benefits of tourism.</td>
<td>[ ]</td>
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<tr>
<td>Amount of traffic on roads as a result of tourism.</td>
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<tr>
<td>Level of crowding in parks and on sidewalks and beaches as a result of tourism.</td>
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<tr>
<td>Level of crowding in shops and restaurants as a result of tourism.</td>
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<tr>
<td>Negative effects of tourism on personal safety.</td>
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<tr>
<td>Urban sprawl caused by tourism.</td>
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<tr>
<td>Having a voice in tourism-related decisions.</td>
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<tr>
<td>Negative effects of tourism on the natural environment.</td>
<td>[ ]</td>
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<tr>
<td>Effective leadership to solve problems caused by tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on cleanliness and appearance.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourists’ respect for private property rights.</td>
<td>[ ]</td>
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<tr>
<td>Negative effects of tourism on the overall quality of life.</td>
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</tbody>
</table>
5. Listed below are the same tourism management issues in Kailua/Lanikai (as opposed to elsewhere in Hawaii or Hawaii in general) that were used in the previous question. For each one, please indicate how satisfied or dissatisfied you are with the current situation.

<table>
<thead>
<tr>
<th>TOURISM MANAGEMENT ISSUE IN KAILUA/LANIKAI</th>
<th>HOW SATISFIED ARE YOU WITH THE CURRENT SITUATION?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extremely Dissatisfied</td>
</tr>
<tr>
<td>Negative effects of vacation rentals.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Economic benefits of tourism.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Amount of traffic on roads as a result of tourism.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
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<tr>
<td>Level of crowding in parks and on sidewalks and beaches as a result of tourism.</td>
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<tr>
<td>Level of crowding in shops and restaurants as a result of tourism.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on personal safety.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
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<tr>
<td>Urban sprawl caused by tourism.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Having a voice in tourism-related decisions.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on the natural environment.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Effective leadership to solve problems caused by tourism.</td>
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<tr>
<td>Negative effects of tourism on cleanliness and appearance.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Tourists’ respect for private property rights.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on the overall quality of life.</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
</tbody>
</table>

6. Which of the following best describes how you feel about the presence of tourists in Kailua/Lanikai?

<table>
<thead>
<tr>
<th>I’m happy with the presence of tourists. I welcome them.</th>
<th>I’m indifferent to the presence of tourists. They don’t concern me.</th>
<th>I’m worried about the presence of tourists. They are beginning to concern me.</th>
<th>I’m irritated by the presence of tourists. They are a problem for me.</th>
<th>I’m outraged by the presence of tourists. They are a big problem for me!</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Please tell us a little about yourself. All your responses will be completely confidential.

7. What is your sex? [ ] Male  [ ] Female

8. How old were you on your most recent birthday? ___________ years

9. In what country were you born? ________________________________

10. Do you live in Kailua/Lanikai for more than 6 months of the year?
    [ ] Yes  [ ] No

    10a. Where do you live for more than 6 months of the year?
    State/Province: ________________ Country: ________________

    PLEASE CONTINUE WITH QUESTION 11

    10b. How many years have you lived in Kailua/Lanikai for more than 6 months of the year? ______

    PLEASE CONTINUE WITH QUESTION 11

11. Which of the following income-related situations applies to you?
    [ ] I work for a government agency or nonprofit organization that markets Hawaii to prospective tourists.
    [ ] I own, operate, or work for a business that directly serves visitors to Hawaii (includes vacation rentals).
    [ ] I own, operate, or work for a business that supplies some goods or services to tourism-related businesses or destination marketers in Hawaii.
    [ ] None of the above.

12. Do you work for pay in Kailua/Lanikai? [ ] Yes  [ ] No

13. How do you identify yourself? (Please check only one box.)

    [ ] White, not of Hispanic origin  [ ] Black, not of Hispanic origin  [ ] Hispanic
    [ ] Hawaiian or part-Hawaiian  [ ] Pacific Islander  [ ] Asian  [ ] Multiracial
    [ ] American Indian or Alaskan Native  [ ] Person of the Indian Subcontinent  [ ] Other. Please specify: __________________________

14. What was your total household income before taxes during the past 12 months?
    [ ] Less than $15,000  [ ] $35,000 to $49,999  [ ] $100,000 to $149,999
    [ ] $15,000 to $24,999  [ ] $50,000 to $74,999  [ ] $150,000 to $199,999
    [ ] $25,000 to $34,999  [ ] $75,000 to $99,999  [ ] $200,000 or more
15. (Optional). Please use this space to provide any comments you may wish to make about tourism in Kailua/Lanikai.

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Thanks for your help!!
Appendix F

Waimanalo Resident Survey Questionnaire
1. Please tell us how much you agree or disagree with each of the following statements about tourism **in Waimanalo** (as opposed to elsewhere in Hawaii or Hawaii in general). Please provide only one response for each statement.

<table>
<thead>
<tr>
<th>Statement About Tourism in Waimanalo</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree Nor Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism has increased traffic.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has created good-paying jobs.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
</tr>
<tr>
<td>Tourism has benefited only a few people.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has improved the standard of living.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has increased the cost of living.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has improved shopping, dining, and entertainment opportunities for locals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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</tr>
<tr>
<td>Tourism has increased crime.</td>
<td>[ ]</td>
<td>[ ]</td>
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</tr>
<tr>
<td>Tourism has helped to preserve the natural environment in the area.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
</tr>
<tr>
<td>Vacation rentals have reduced the availability of housing for locals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Vacation rentals have reduced peace and quiet in neighborhoods.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has made it more difficult for locals to participate in outdoor recreation.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has made transportation more difficult for locals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has destroyed the small town feel of Waimanalo.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has reduced locals’ access to restaurants, shops, and recreation areas.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Government decisions on tourism issues tend to favor tourists over locals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourism has brought more benefits than problems.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Existing tourism has lowered the overall quality of life.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
</tr>
<tr>
<td>Increased tourism would lower the overall quality of life.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Statement About Tourism in Waimanalo</td>
<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Neither Agree Nor Disagree</td>
<td>Agree</td>
<td>Strongly Agree</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------------------------</td>
<td>-------------------</td>
<td>----------</td>
<td>----------------------------</td>
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<td>---------------</td>
</tr>
<tr>
<td>I support new tourism development in Waimanalo.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>We should encourage more tourists to visit.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>More tourists will improve the local economy.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Waimanalo can handle more tourists.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourists have the same ideas about acceptable behavior as locals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>I have no difficulty communicating with most of the tourists who visit.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourists are considerate of locals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourists respect locals’ way of life.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>I would be very sad to move away from Waimanalo.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>I’d rather live in Waimanalo than anywhere else.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

2. Some potential solutions to tourism-related problems in Waimanalo are described below. Please indicate how desirable or undesirable each potential solution would be for you. Please provide only one response for each statement.

<table>
<thead>
<tr>
<th>PROPOSED SOLUTION</th>
<th>Very Undesirable</th>
<th>Undesirable</th>
<th>Neutral</th>
<th>Desirable</th>
<th>Very Desirable</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAFFIC IN WAIMANALO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement an electronic “e-toll” on all rental cars and tour buses entering Waimanalo.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>(Vehicles would not have to stop to pay the toll.)</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Pass stricter laws and penalties designed to shut down unlicensed tour operators.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Strictly enforce laws designed to shut down unlicensed tour operators.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Do not allow tour buses to enter Waimanalo on weekends.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>PROPOSED SOLUTION</td>
<td>Very Undesirable</td>
<td>Undesirable</td>
<td>Neutral</td>
<td>Desirable</td>
<td>Very Desirable</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>------------------</td>
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<td>---------</td>
<td>-----------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>SAFETY IN WAIMANALO</strong></td>
<td></td>
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</tr>
<tr>
<td>Require all foreigners renting motor vehicles to watch a driver safety video.</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
</tr>
<tr>
<td>Require all tourists renting bicycles to watch a bicycle safety video.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
</tr>
<tr>
<td>Strictly enforce and penalize bicycling violations.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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</tr>
<tr>
<td>Create a paved bicycle/pedestrian pathway, with separate lanes for bicyclists and pedestrians.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td><strong>VACATION RENTALS SUCH AS AIRBNBS IN WAIMANALO</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pass new rules to tax vacation rentals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>More strictly enforce rules controlling vacation rentals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>More heavily fine property owners who illegally operate vacation rentals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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</tr>
<tr>
<td>Cap the number of nights per year that home owners can rent their properties to tourists.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>More strictly regulate vacation rentals.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td><strong>PUBLIC FACILITIES IN WAIMANALO</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expand the capacity of parking at beach parks.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Improve the design and appearance of parking lots at beach parks.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Expand the capacity of public restrooms at beach parks.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Improve maintenance and cleanliness of public restrooms at beach parks.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td><strong>CONGESTION IN WAIMANALO</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Reduce marketing of Waimanalo as a tourist destination.</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
</tr>
<tr>
<td>Encourage tourists to visit less congested areas on Oahu through a smart phone app that would provide real-time information on congestion levels across the island and discounts at businesses in less congested areas.</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
3. Which of the following best describes how much contact you have with tourists in Waimanalo?

<table>
<thead>
<tr>
<th>No contact with tourists at all</th>
<th>Rare, unplanned contact with tourists</th>
<th>Occasional, unplanned contact with tourists</th>
<th>Occasional, planned contact with tourists</th>
<th>Frequent, unplanned contact with tourists</th>
<th>Frequent, deliberate contact with tourists as part of my work</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

4. Listed below are some tourism management issues in Waimanalo (as opposed to elsewhere in Hawaii or Hawaii in general). For each one, please indicate how important or unimportant this issue is to you.

<table>
<thead>
<tr>
<th>TOURISM MANAGEMENT ISSUE IN WAIMANALO</th>
<th>HOW IMPORTANT IS THIS TO YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not At All Important</td>
</tr>
<tr>
<td>Negative effects of vacation rentals.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Economic benefits of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Amount of traffic on roads as a result of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in parks and on sidewalks and beaches as a result of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in shops and restaurants as a result of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on personal safety.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Urban sprawl caused by tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Having a voice in tourism-related decisions.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on the natural environment.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Effective leadership to solve problems caused by tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on cleanliness and appearance.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourists’ respect for private property rights.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on the overall quality of life.</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
5. Listed below are the same tourism management issues in Waimanalo (as opposed to elsewhere in Hawaii or Hawaii in general) that were used in the previous question. For each one, please indicate how satisfied or dissatisfied you are with the current situation.

<table>
<thead>
<tr>
<th>TOURISM MANAGEMENT ISSUE IN WAIMANALO</th>
<th>HOW SATISFIED ARE YOU WITH THE CURRENT SITUATION?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extremely Dissatisfied</td>
</tr>
<tr>
<td>Negative effects of vacation rentals.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Economic benefits of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Amount of traffic on roads as a result of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in parks and on sidewalks and beaches as a result of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in shops and restaurants as a result of tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on personal safety.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Urban sprawl caused by tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Having a voice in tourism-related decisions.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on the natural environment.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Effective leadership to solve problems caused by tourism.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on cleanliness and appearance.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Tourists’ respect for private property rights.</td>
<td>[ ]</td>
</tr>
<tr>
<td>Negative effects of tourism on the overall quality of life.</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

6. Which of the following best describes how you feel about the presence of tourists in Waimanalo?

<table>
<thead>
<tr>
<th>I’m happy with the presence of tourists. I welcome them.</th>
<th>I’m indifferent to the presence of tourists. They don’t concern me.</th>
<th>I’m worried about the presence of tourists. They are beginning to concern me.</th>
<th>I’m irritated by the presence of tourists. They are a problem for me.</th>
<th>I’m outraged by the presence of tourists. They are a big problem for me!</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

109
Please tell us a little about yourself. All your responses will be completely confidential.

7. What is your sex? [ ] Male [ ] Female

8. How old were you on your most recent birthday? ___________ years

9. In what country were you born? __________________________

10. Do you live in Waimanalo for more than 6 months of the year?

[ ] Yes [ ] No

10a. Where do you live for more than 6 months of the year?

State/Province: ___________ Country: ___________

PLEASE CONTINUE WITH QUESTION 11

10b. How many years have you lived in Waimanalo for more than 6 months of the year? ______

PLEASE CONTINUE WITH QUESTION 11

11. Which of the following income-related situations applies to you?

[ ] I work for a government agency or nonprofit organization that markets Hawaii to prospective tourists.
[ ] I own, operate, or work for a business that directly serves visitors to Hawaii (includes vacation rentals).
[ ] I own, operate, or work for a business that supplies some goods or services to tourism-related businesses or destination marketers in Hawaii.
[ ] None of the above.

12. Do you work for pay in Waimanalo? [ ] Yes [ ] No

13. How do you identify yourself? (Please check only one box.)

[ ] White, not of Hispanic origin [ ] Asian
[ ] Black, not of Hispanic origin [ ] Multiracial
[ ] Hispanic [ ] American Indian or Alaskan Native
[ ] Hawaiian or part-Hawaiian [ ] Person of the Indian Subcontinent
[ ] Pacific Islander [ ] Other. Please specify: __________________________

14. What was your total household income before taxes during the past 12 months?

[ ] Less than $15,000 [ ] $35,000 to $49,999 [ ] $100,000 to $149,999
[ ] $15,000 to $24,999 [ ] $50,000 to $74,999 [ ] $150,000 to $199,999
[ ] $25,000 to $34,999 [ ] $75,000 to $99,999 [ ] $200,000 or more
15. (Optional). Please use this space to provide any comments you may wish to make about tourism in Waimanalo.

______________________________________________________________________________
______________________________________________________________________________
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______________________________________________________________________________

Thanks for your help!! Please return your completed questionnaire using the enclosed self-addressed, postage-paid envelope. If you misplaced this envelope, please return your completed questionnaire to: Windward Oahu Tourism Assessment, University of Hawai‘i Sea Grant Program, 2525 Correa Rd., HIG 238, Honolulu, HI 96822. If you have any questions, please contact us at (808) 956-9780.
Appendix G

Kailua/Lanikai Visitor Survey Questionnaire
THANK YOU VERY MUCH FOR YOUR WILLINGNESS TO ASSIST US!! YOUR RESPONSES WILL HELP US BETTER SERVE VISITORS TO KAILUA/LANIKAI.

1. Prior to leaving home on your trip to Hawaii, did you discover or learn more about Kailua/Lanikai as a tourist destination from any source of information?

[ ] Yes  [ ] No  →  SKIP TO QUESTION 2

1a. How did you discover or learn more about Kailua/Lanikai as a tourist destination prior to leaving home? (Please check all that apply.)

[ ] E-mail advertisement  [ ] Facebook.com
[ ] TripAdvisor.com  [ ] Advertisement on a website
[ ] Friend, relative, co-worker, etc.  [ ] Article
[ ] Travel agent  [ ] Other; please specify:__________________
[ ] GoHawaii.com

1b. How much did this information influence you to visit Kailua/Lanikai?

[ ] Not at all  [ ] Very little  [ ] To some extent  [ ] A great deal

2. After arriving in Hawaii on this trip, did you discover or learn more about Kailua/Lanikai as a tourist destination from any source of information?

[ ] Yes  [ ] No  →  SKIP TO QUESTION 3

2a. How did you discover or learn more about Kailua/Lanikai as a tourist destination after arriving in Hawaii on this trip? (Please check all that apply.)

[ ] E-mail advertisement  [ ] Facebook.com
[ ] TripAdvisor.com  [ ] Advertisement on a website
[ ] Friend, relative, co-worker, etc.  [ ] Article
[ ] Hotel concierge / activity desk  [ ] Other; please specify:__________________
[ ] GoHawaii.com

2b. How much did this information influence you to visit Kailua/Lanikai?

[ ] Not at all  [ ] Very little  [ ] To some extent  [ ] A great deal
3. Is this your first visit to Hawaii?  [ ] Yes  [ ] No

4. Is this your first visit to Kailua/Lanikai?  [ ] Yes  [ ] No

5. Is Kailua/Lanikai the main destination of your trip to Hawaii?  [ ] Yes  [ ] No

6. What is the purpose of your visit to Kailua/Lanikai? (Please check one or more categories.)
   [ ] Business
   [ ] To visit relative(s) and/or friend(s)
   [ ] Convention or meeting
   [ ] Other; please specify:____________________
   [ ] Recreation

7. How did you travel to Kailua/Lanikai?

<table>
<thead>
<tr>
<th>Your own vehicle</th>
<th>Rental vehicle</th>
<th>Bicycle</th>
<th>Uber/Lyft</th>
<th>Conventional Taxi</th>
<th>Public bus</th>
<th>Tour bus or van</th>
<th>Other; please specify:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

   SKIP TO QUESTION 8

7a. Where did you park? Please check all that apply.

<table>
<thead>
<tr>
<th>Parking garage in downtown Kailua</th>
<th>On the street in downtown Kailua</th>
<th>Parking lot at Kailua Beach Park</th>
<th>On the street in a residential neighborhood</th>
<th>Other; please specify:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

7b. How satisfied or dissatisfied are you with vehicle parking in Kailua/Lanikai?

<table>
<thead>
<tr>
<th>Extremely Dissatisfied</th>
<th>Somewhat Satisfied</th>
<th>Extremely Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

8. Who is visiting Kailua/Lanikai today? Please check all that apply.

   [ ] Just myself
   [ ] Friend(s)
   [ ] Adult family member(s)
   [ ] Business associate(s)
   [ ] Child(ren) under age 10
   [ ] Child(ren) age 10-17 Number of persons in group: ____________________
   [ ] Other; please specify:____________________________________________
9. How many persons in your personal group, **including yourself**, are visiting Kailua/Lanikai? ______

10. Will you be leaving Kailua/Lanikai within the next hour? [ ] Yes [ ] No [ ] Don’t know

11. When your trip is over, how many nights will you have spent . . . .

<table>
<thead>
<tr>
<th>11a. on Oahu? _____ nights</th>
<th>11b. in Hawaii? _____nights</th>
<th>11c. altogether? _____nights</th>
</tr>
</thead>
</table>

12. When your trip is over, where will you have spent the most nights in Hawaii?

[ ] Waikiki  [ ] Kailua/Lanikai  [ ] Waianae

[ ] Elsewhere in Honolulu  [ ] Laie  [ ] On a Neighbor Island

[ ] Ko Olina  [ ] Turtle Bay Resort  [ ] Other; please specify:

13. When your trip is over, will you have spent any nights in Kailua/Lanikai?

[ ] Yes  [ ] No

13a. How many hours will you be spending in Kailua/Lanikai altogether? _______ hours

**SKIP TO QUESTION 14**

13b. When your trip is over, how many **total nights** will you have spent in Kailua/Lanikai?______

13c. When your trip is over, how many nights will you have spent in each of the following types of lodging **while you were in Kailua/Lanikai**? Please write “0” if you have not spent, or will not spend, any nights in a given type of lodging.

<table>
<thead>
<tr>
<th>Type of Lodging</th>
<th>Number of Nights in Kailua/Lanikai</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airbnb, Vrbo, or HomeAway</td>
<td></td>
</tr>
<tr>
<td>Other vacation rental</td>
<td></td>
</tr>
<tr>
<td>Bed and Breakfast</td>
<td></td>
</tr>
<tr>
<td>Second home you own</td>
<td></td>
</tr>
<tr>
<td>Timeshare</td>
<td></td>
</tr>
<tr>
<td>Friend’s or relative’s home</td>
<td></td>
</tr>
<tr>
<td>Camping</td>
<td></td>
</tr>
<tr>
<td>Other; please specify:</td>
<td></td>
</tr>
</tbody>
</table>

115
14. What types of recreation activities did you, or will you, participate in during your visit to Kailua/Lanikai? Please check all that apply.

- [ ] Attending an event
- [ ] Beach walking
- [ ] Bicycling
- [ ] Boating
- [ ] Body surfing
- [ ] Dining at table service restaurant
- [ ] Nightlife
- [ ] Hang gliding
- [ ] Jet skiing
- [ ] Kitesurfing
- [ ] Fishing
- [ ] Outrigger canoeing
- [ ] Parasailing
- [ ] Scuba diving
- [ ] Sea kayaking
- [ ] Shopping
- [ ] Snorkeling
- [ ] Stand-up paddleboarding
- [ ] Sunbathing
- [ ] Surfing
- [ ] Swimming or wading in the ocean
- [ ] Hiking on Lanikai Pillbox Trail
- [ ] Hiking on some other trail
- [ ] Windsurfing
- [ ] Other; please specify: 

- [ ] NONE OF THE ABOVE

15. Have you spent any money in Kailua/Lanikai so far on your visit here?

- [ ] Yes
- [ ] No  →  SKIP TO QUESTION 16

15a. About how much have you and other members of your personal group spent in Kailua/Lanikai so far on your visit here, including any pre-paid lodging deposits. Please write “0” if you have not spent any money in a particular category.

<table>
<thead>
<tr>
<th>Item</th>
<th>Expenditures in Kailua/Lanikai</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airbnb, Vrbo, or HomeAway</td>
<td>$</td>
</tr>
<tr>
<td>Other lodging</td>
<td>$</td>
</tr>
<tr>
<td>Restaurants and bars</td>
<td>$</td>
</tr>
<tr>
<td>Groceries and take out food</td>
<td>$</td>
</tr>
<tr>
<td>Gasoline and oil for vehicle and/or boat</td>
<td>$</td>
</tr>
<tr>
<td>Vehicle rental</td>
<td>$</td>
</tr>
<tr>
<td>Equipment rental (e.g., snorkeling gear, kayaks, paddleboards)</td>
<td>$</td>
</tr>
<tr>
<td>Admission fees for attractions</td>
<td>$</td>
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<tr>
<td>Entertainment (e.g., dinner shows, luaus, movies)</td>
<td>$</td>
</tr>
<tr>
<td>Activities and excursions (e.g., golfing, tours, charter fishing)</td>
<td>$</td>
</tr>
<tr>
<td>All other purchases (e.g., sporting goods, souvenirs, clothing, gifts)</td>
<td>$</td>
</tr>
</tbody>
</table>
16. Do you think you will spend more money on Oahu as a result of visiting Kailua/Lanikai?

[ ] Yes  [ ] No  SKIP TO QUESTION 17

16a. About how much more money do you think you will spend on Oahu as a result of visiting Kailua/Lanikai? $_____________

17. Have you visited, or are you planning to visit, Kailua Beach Park during your visit to Kailua/Lanikai?

[ ] Yes  [ ] No  SKIP TO QUESTION 18

17a. On the calendar to the right, please circle the dates in July 2019 that you visited, or are planning to visit, Kailua Beach Park.

<table>
<thead>
<tr>
<th>JULY 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
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<td>Monday</td>
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<td>31</td>
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</tbody>
</table>

18. Have you visited, or are you planning to visit, Lanikai Beach during your visit to Kailua/Lanikai?

[ ] Yes  [ ] No

19. How likely are you to . . .

<table>
<thead>
<tr>
<th></th>
<th>Very Unlikely</th>
<th>Unlikely</th>
<th>Neither Likely Nor Unlikely</th>
<th>Likely</th>
<th>Very Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>. . . visit Kailua/Lanikai again?</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>. . . recommend a visit to Kailua/Lanikai to someone you know?</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
20. How important or unimportant are each of the following aspects of Kailua/Lanikai to you?

<table>
<thead>
<tr>
<th>ASPECT OF KAILUA/LANIKAI</th>
<th>HOW IMPORTANT IS THIS TO YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not At All Important</td>
</tr>
<tr>
<td>Amount of traffic on roads</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in parks and on sidewalks and beaches</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in shops and restaurants</td>
<td>[ ]</td>
</tr>
<tr>
<td>Personal safety</td>
<td>[ ]</td>
</tr>
<tr>
<td>Security of my belongings</td>
<td>[ ]</td>
</tr>
<tr>
<td>Quality of goods and services available to buy</td>
<td>[ ]</td>
</tr>
<tr>
<td>Customer service in shops and restaurants</td>
<td>[ ]</td>
</tr>
<tr>
<td>Friendliness of the local people</td>
<td>[ ]</td>
</tr>
<tr>
<td>Cleanliness and appearance</td>
<td>[ ]</td>
</tr>
<tr>
<td>Quality of the area’s natural environment</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

21. How satisfied or dissatisfied are you with each of the following aspects of Kailua/Lanikai, and with Kailua/Lanikai OVERALL?

<table>
<thead>
<tr>
<th>ASPECT OF KAILUA/LANIKAI</th>
<th>HOW SATISFIED ARE YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extremely Dissatisfied</td>
</tr>
<tr>
<td>Amount of traffic on roads</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in parks and on sidewalks and beaches</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in shops and restaurants</td>
<td>[ ]</td>
</tr>
<tr>
<td>Personal safety</td>
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<td>Cleanliness and appearance</td>
<td>[ ]</td>
</tr>
<tr>
<td>Quality of the area’s natural environment</td>
<td>[ ]</td>
</tr>
<tr>
<td>OVERALL</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
Please tell us a little about yourself so we can determine what kinds of people visit Kailua/Lanikai. All your responses will be completely confidential.

22. Is your primary residence in the United States or Canada?

[ ] Yes [ ] No

22a. Where is your primary residence?

State/Province: ____________________ Country: ________________

SKIP TO QUESTION 23

22b. What is the zip or postal code of your primary residence? ________________________________

23. What is your sex? [ ] Male [ ] Female

24. How old were you on your most recent birthday? _______ years

25. (Optional). Please use this space to provide any comments you may wish to make about your visit to Kailua/Lanikai and/or what should be done to provide higher quality experiences for visitors to Kailua/Lanikai.

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
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____________________________________________________________________________________
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____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

Thanks for your help!! Please return your completed questionnaire to anyone on our survey team. If you have any questions, please contact us at (808) 956-9780.
Appendix H

Waimanalo Visitor Survey Questionnaire
2019 Survey of Visitors to Waimanalo
University of Hawaii Sea Grant Program

THANK YOU VERY MUCH FOR YOUR WILLINGNESS TO ASSIST US!! YOUR RESPONSES WILL HELP US BETTER SERVE VISITORS TO WAIMANALO.

1. Prior to leaving home on your trip to Hawaii, did you discover or learn more about Waimanalo as a tourist destination from any source of information?

[ ] Yes  [ ] No → SKIP TO QUESTION 2

1a. How did you discover or learn more about Waimanalo as a tourist destination prior to leaving home? (Please check all that apply.)

[ ] E-mail advertisement
[ ] TripAdvisor.com
[ ] Friend, relative, co-worker, etc.
[ ] Travel agent
[ ] GoHawaii.com
[ ] Facebook.com
[ ] Advertisement on a website
[ ] Article
[ ] Other; please specify:______________

1b. How much did this information influence you to visit Waimanalo?

[ ] Not at all  [ ] Very little  [ ] To some extent  [ ] A great deal

2. After arriving in Hawaii on this trip, did you discover or learn more about Waimanalo as a tourist destination from any source of information?

[ ] Yes  [ ] No → SKIP TO QUESTION 3

2a. How did you discover or learn more about Waimanalo as a tourist destination after arriving in Hawaii on this trip? (Please check all that apply.)

[ ] E-mail advertisement
[ ] TripAdvisor.com
[ ] Friend, relative, co-worker, etc.
[ ] Hotel concierge / activity desk
[ ] GoHawaii.com
[ ] Facebook.com
[ ] Advertisement on a website
[ ] Article
[ ] Other; please specify:______________

2b. How much did this information influence you to visit Waimanalo?

[ ] Not at all  [ ] Very little  [ ] To some extent  [ ] A great deal
3. Is this your first visit to Hawaii? [ ] Yes [ ] No
4. Is this your first visit to Waimanalo? [ ] Yes [ ] No
5. Is Waimanalo the main destination of your trip to Hawaii? [ ] Yes [ ] No
6. What is the purpose of your visit to Waimanalo? (Please check one or more categories.)
   [ ] Business
   [ ] Convention or meeting
   [ ] Recreation
   [ ] To visit relative(s) and/or friend(s)
   [ ] Other; please specify: __________________

7. How did you travel to Waimanalo?

<table>
<thead>
<tr>
<th>Your own vehicle</th>
<th>Rental vehicle</th>
<th>Bi-cycle</th>
<th>Uber/Lyft</th>
<th>Conventional Taxi</th>
<th>Public bus</th>
<th>Tour bus or van</th>
<th>Other; please specify:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

7a. Where did you park? Please check all that apply.

<table>
<thead>
<tr>
<th>On the street in downtown Waimanalo</th>
<th>Parking lot at Waimanalo Beach Park</th>
<th>On the street in a residential neighborhood</th>
<th>Other; please specify:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

7b. How satisfied or dissatisfied are you with vehicle parking in Waimanalo?

<table>
<thead>
<tr>
<th>Extremely Dissatisfied</th>
<th>Somewhat Satisfied</th>
<th>Extremely Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

8. Who is visiting Waimanalo today? Please check all that apply.

[ ] Just myself
[ ] Friend(s)
[ ] Adult family member(s)
[ ] Business associate(s)
[ ] Child(ren) under age 10
[ ] Child(ren) age 10-17
[ ] Organized group. Name of group: __________________
[ ] Number of persons in group: ____________
[ ] Other; please specify: ____________________________
9. How many persons in your personal group, including yourself, are visiting Waimanalo? ______

10. Will you be leaving Waimanalo within the next hour? [ ] Yes [ ] No [ ] Don’t know

11. When your trip is over, how many nights will you have spent . . . .

<table>
<thead>
<tr>
<th>11a. on Oahu? _____ nights</th>
<th>11b. in Hawaii? _____ nights</th>
<th>11c. altogether? _____ nights</th>
</tr>
</thead>
</table>

12. When your trip is over, where will you have spent the most nights in Hawaii?

[ ] Waikiki [ ] Waimanalo [ ] Waianae
[ ] Elsewhere in Honolulu [ ] Laie [ ] On a Neighbor Island
[ ] Ko Olina [ ] Turtle Bay Resort [ ] Other; please specify:

13. When your trip is over, will you have spent any nights in Waimanalo?

[ ] Yes [ ] No

13a. How many hours will you be spending in Waimanalo altogether? ______ hours  

13b. When your trip is over, how many total nights will you have spent in Waimanalo? ______

13c. When your trip is over, how many nights will you have spent in each of the following types of lodging while you were in Waimanalo? Please write “0” if you have not spent, or will not spend, any nights in a given type of lodging.

<table>
<thead>
<tr>
<th>Type of Lodging</th>
<th>Number of Nights in Waimanalo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airbnb, Vrbo, or HomeAway</td>
<td></td>
</tr>
<tr>
<td>Other vacation rental</td>
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<tr>
<td>Camping</td>
<td></td>
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<tr>
<td>Other; please specify:</td>
<td></td>
</tr>
</tbody>
</table>

123 Socioeconomic Impacts of Tourism in Kailua and Waimanalo, Hawai‘i
14. What types of recreation activities did you, or will you, participate in during your visit to Waimanalo? Please check all that apply.

- [ ] Attending an event
- [ ] Beach walking
- [ ] Bicycling
- [ ] Boating
- [ ] Body surfing
- [ ] Dining at table service
- [ ] Nightlife
- [ ] Hang gliding
- [ ] Jet skiing
- [ ] Surfing
- [ ] Outrigger canoeing
- [ ] Parasailing
- [ ] Scuba diving
- [ ] Sea kayaking
- [ ] Shopping
- [ ] Stand-up paddleboarding
- [ ] Sunbathing
- [ ] Swimming or wading in the ocean
- [ ] Hiking on Lanikai Pillbox Trail
- [ ] Hiking on some other trail
- [ ] Windsurfing
- [ ] Other; please specify: _______________________
- [ ] NONE OF THE ABOVE

15. Have you spent any money in Waimanalo so far on your visit here?

- [ ] Yes
- [ ] No

15a. About how much have you and other members of your personal group spent in Waimanalo so far on your visit here, including any pre-paid lodging deposits. Please write “0” if you have not spent any money in a particular category.

<table>
<thead>
<tr>
<th>Item</th>
<th>Expenditures in Waimanalo</th>
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<tbody>
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<td>All other purchases (e.g., sporting goods, souvenirs, clothing, gifts)</td>
<td>$</td>
</tr>
</tbody>
</table>
16. Do you think you will spend more money on Oahu as a result of visiting Waimanalo?  
[ ] Yes  [ ] No  SKIP TO QUESTION 17

16a. About how much more money do you think you will spend on Oahu as a result of visiting Waimanalo?  $_____________  

17. Have you visited, or are you planning to visit, Waimanalo Beach Park during your visit to Waimanalo?  
[ ] Yes  [ ] No  SKIP TO QUESTION 18

17a. On the calendar to the right, please circle the dates in July 2019 that you visited, or are planning to visit, Waimanalo Beach Park.

<table>
<thead>
<tr>
<th>JULY 2019</th>
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</thead>
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</tbody>
</table>

18. Have you visited, or are you planning to visit, Lanikai Beach during your visit to Waimanalo?  
[ ] Yes  [ ] No

19. How likely are you to . . .

<table>
<thead>
<tr>
<th></th>
<th>Very Unlikely</th>
<th>Unlikely</th>
<th>Neither Likely Nor Unlikely</th>
<th>Likely</th>
<th>Very Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>. . . visit Waimanalo again?</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>. . . recommend a visit to Waimanalo to someone you know?</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
20. How important or unimportant are each of the following aspects of Waimanalo to you?

<table>
<thead>
<tr>
<th>ASPECT OF WAIMANALO</th>
<th>HOW IMPORTANT IS THIS TO YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not At All Important</td>
</tr>
<tr>
<td>Amount of traffic on roads</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in parks and on sidewalks and beaches</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in shops and restaurants</td>
<td>[ ]</td>
</tr>
<tr>
<td>Personal safety</td>
<td>[ ]</td>
</tr>
<tr>
<td>Security of my belongings</td>
<td>[ ]</td>
</tr>
<tr>
<td>Quality of goods and services available to buy</td>
<td>[ ]</td>
</tr>
<tr>
<td>Customer service in shops and restaurants</td>
<td>[ ]</td>
</tr>
<tr>
<td>Friendliness of the local people</td>
<td>[ ]</td>
</tr>
<tr>
<td>Cleanliness and appearance</td>
<td>[ ]</td>
</tr>
<tr>
<td>Quality of the area’s natural environment</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

21. How satisfied or dissatisfied are you with each of the following aspects of Waimanalo, and with Waimanalo OVERALL?

<table>
<thead>
<tr>
<th>ASPECT OF WAIMANALO</th>
<th>HOW SATISFIED ARE YOU?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extremely Dissatisfied</td>
</tr>
<tr>
<td>Amount of traffic on roads</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in parks and on sidewalks and beaches</td>
<td>[ ]</td>
</tr>
<tr>
<td>Level of crowding in shops and restaurants</td>
<td>[ ]</td>
</tr>
<tr>
<td>Personal safety</td>
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<td>Customer service in shops and restaurants</td>
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<tr>
<td>Friendliness of the local people</td>
<td>[ ]</td>
</tr>
<tr>
<td>Cleanliness and appearance</td>
<td>[ ]</td>
</tr>
<tr>
<td>Quality of the area’s natural environment</td>
<td>[ ]</td>
</tr>
<tr>
<td>OVERALL</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
Please tell us a little about yourself so we can determine what kinds of people visit Waimanalo. All your responses will be completely confidential.

22. Is your primary residence in the United States or Canada?

[ ] Yes    [ ] No

22a. Where is your primary residence?
State/Province:_________________________ Country:______________________

SKIP TO QUESTION 23

22b. What is the zip or postal code of your primary residence? ____________________________

23. What is your sex?    [ ] Male    [ ] Female

24. How old were you on your most recent birthday?_______ years

25. (Optional). Please use this space to provide any comments you may wish to make about your visit to Waimanalo and/or what should be done to provide higher quality experiences for visitors to Waimanalo.

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

Thanks for your help!! Please return your completed questionnaire to anyone on our survey team. If you have any questions, please contact us at (808) 956-9780.