

Key Results of the Kailua Resident and Visitor Surveys

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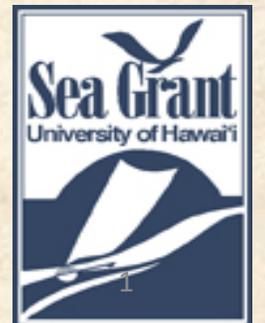
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Introduction

- **Surveys of the residents of, and visitors to, Kailua and Waimanalo were conducted during the second half of 2019**
- **The resident surveys were conducted to document residents' attitudes, and identify ways to alleviate their concerns, about tourism in these communities**
- **Visitors to these communities were surveyed concurrently with the resident surveys so visitor volumes and expenditures could be estimated and provide context for the results on resident sentiments about tourism**

Kailua Resident Survey Methods

- Residents were surveyed online using the Qualtrics survey research platform
- A random, systematic sample was drawn from a list of the email addresses of 9,502 adult residents of Kailua purchased from Infogroup.com.
- The response rate was 20.9% after nine email reminders and one postcard reminder
- The study population was deliberately oversampled; respondents in over-represented demographic categories were then randomly deleted until the achieved sample was within four percentage points of the study population in terms of sex, age, race, and household income, as determined by the U.S. Bureau of the Census
- After this process the achieved resident sample consisted of 574 respondents

Respondents' attitudes about tourism in Kailua were measured by presenting them with a list of statements on this subject (e.g., "Tourism has increased the cost of living") and providing response options in the form of a five-point scale that ranged from "Strongly Disagree" to "Strongly Agree"

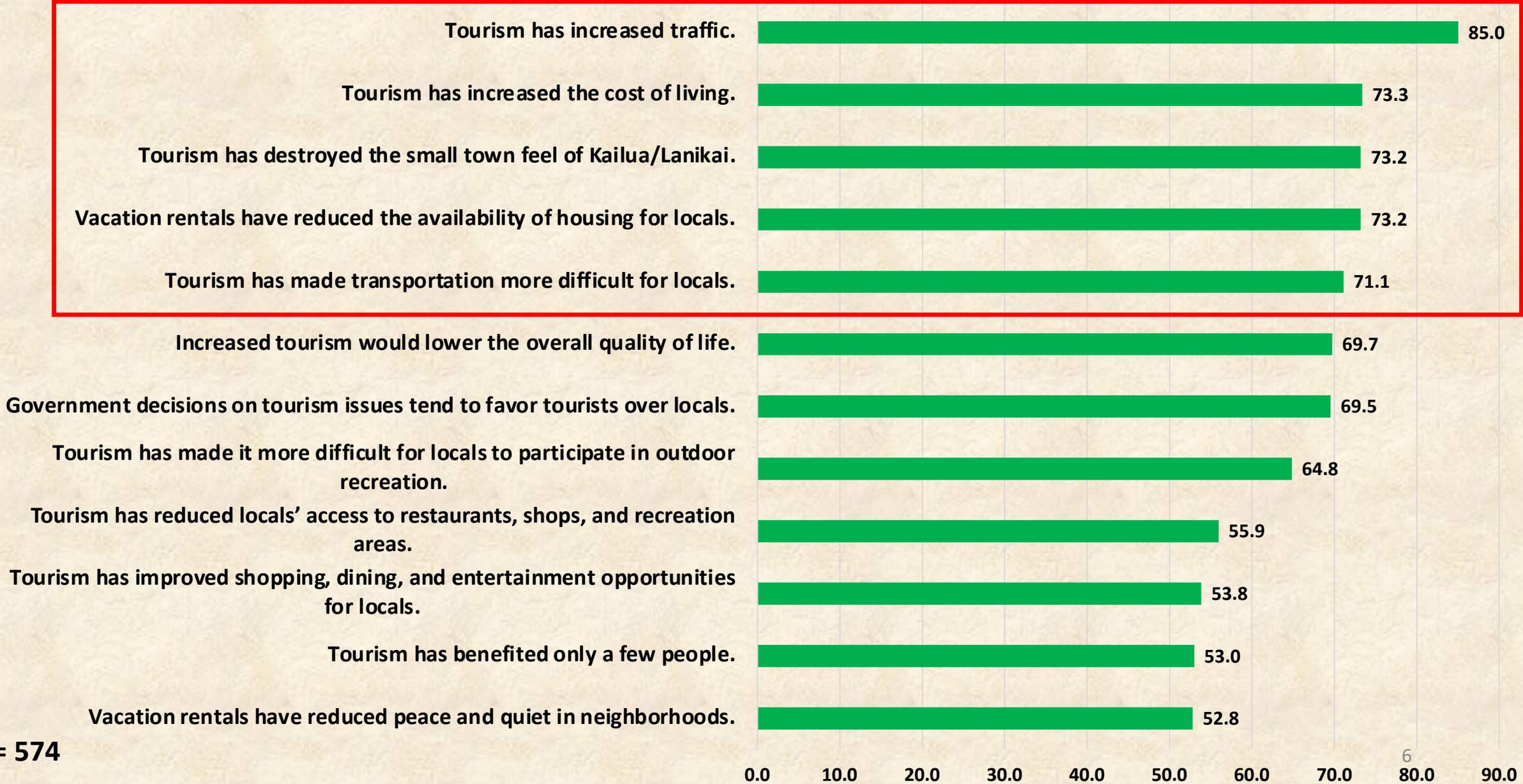
1. Please tell us how much you agree or disagree with each of the following statements about tourism in Kailua/Lanikai (as opposed to elsewhere in Hawaii or Hawaii in general). Please provide only one response for each statement.

Statement About Tourism in Kailua/Lanikai	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree
Tourism has increased traffic.	[]	[]	[]	[]	[]
Tourism has created good-paying jobs.	[]	[]	[]	[]	[]
Tourism has benefited only a few people.	[]	[]	[]	[]	[]
Tourism has improved the standard of living.	[]	[]	[]	[]	[]
Tourism has increased the cost of living.	[]	[]	[]	[]	[]
Tourism has improved shopping, dining, and entertainment opportunities for locals.	[]	[]	[]	[]	[]
Tourism has increased crime.	[]	[]	[]	[]	[]
Tourism has helped to preserve the natural environment in the area.	[]	[]	[]	[]	[]
Vacation rentals have reduced the availability of housing for locals.	[]	[]	[]	[]	[]
Vacation rentals have reduced peace and quiet in neighborhoods.	[]	[]	[]	[]	[]
Tourism has made it more difficult for locals to participate in outdoor recreation.	[]	[]	[]	[]	[]
Tourism has made transportation more difficult for locals.	[]	[]	[]	[]	[]
Tourism has destroyed the small town feel of Kailua/Lanikai.	[]	[]	[]	[]	[]
Tourism has reduced locals' access to restaurants, shops, and recreation areas.	[]	[]	[]	[]	[]

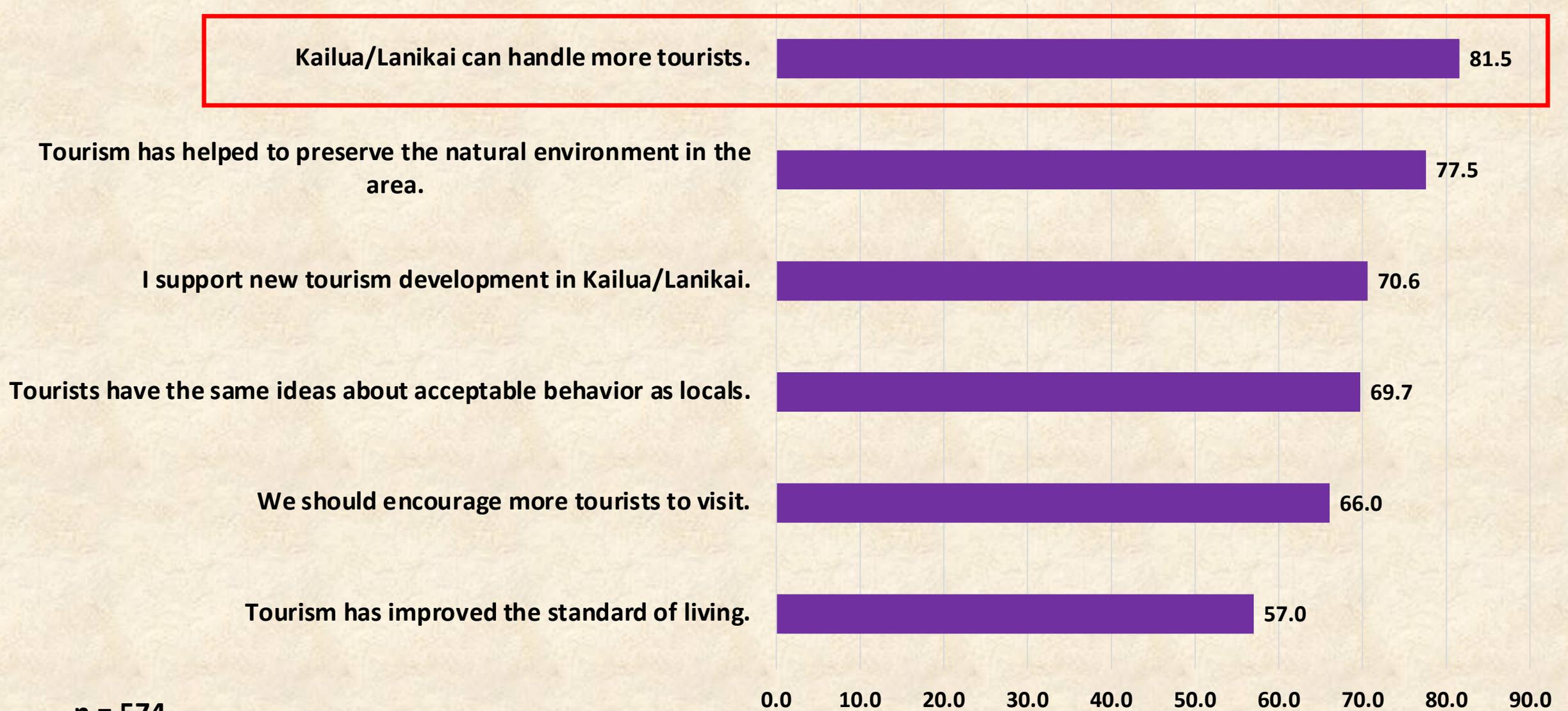
Results of Kailua Resident Survey



Majority views among Kailua residents: Percentage agreeing or strongly agreeing with a given statement



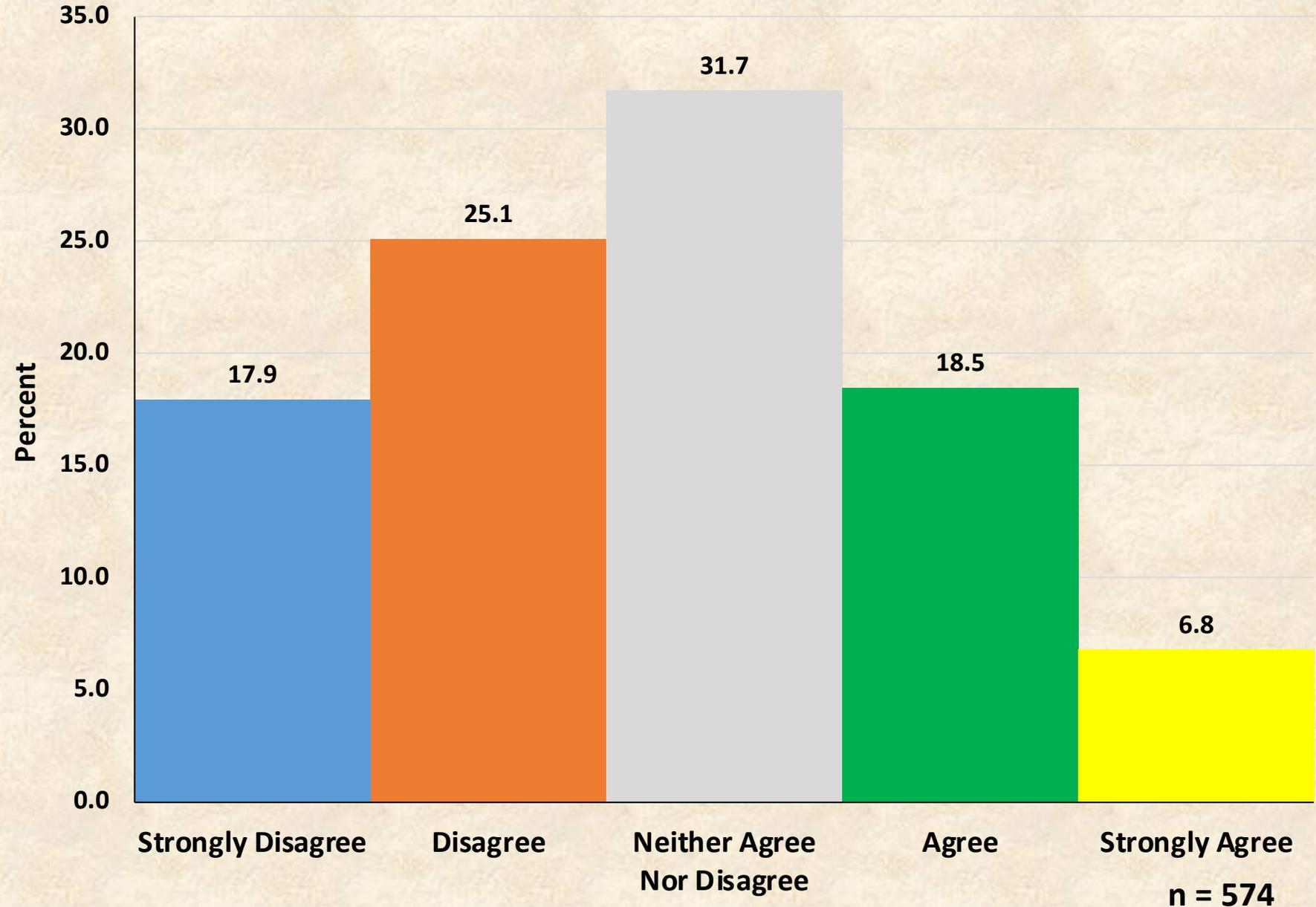
Majority views among Kailua residents: Percentage disagreeing or strongly disagreeing with a given statement



n = 574

Kailua residents' responses to the attitude statement, "Tourism has brought more benefits than problems"

- 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.
- Such perceptions were measured by asking residents to indicate the extent to which they agreed or disagreed with the statement, "Tourism has brought more benefits than problems."



Kailua residents' position on a tourism-related "Irritation Index"

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

I'm happy with the presence of tourists. I welcome them.	I'm indifferent to the presence of tourists. They don't concern me.	I'm worried about the presence of tourists. They are beginning to concern me.	I'm irritated by the presence of tourists. They are a problem for me.	I'm outraged by the presence of tourists. They are a big problem for me!
[1] 19.2%	[2] 11.3%	[3] 36.9%	[4] 25.3%	[5] 7.2%



Mean: 2.90

Standard Deviation: 1.19

Mode: 3

Minimum: 1

Maximum: 5

n: 442