



WARD RESEARCH
I N C O R P O R A T E D

The following summarizes findings from a survey mailed to all 15,856 Kailua households. Survey packets were mailed out on September 10, 2018. Survey recipients were given the option of completing and returning a hard copy mail survey or completing the survey online. A total of 4,490 Kailua residents responded to the survey by the October 1, 2018 cutoff date (or an exceptional 28.3% response rate).

- About three out of four Kailua residents surveyed (75%) indicated that they are satisfied with overall life in Kailua. They are, however, less satisfied with various aspects of life in Kailua.

	5 - Extremely Satisfied	4 rating	3 Rating	2 Rating	1 - Extremely Dissatisfied	Don't Know / Left Blank
Overall life in Kailua	27%	48%	16%	5%	2%	2%
Mix of restaurants	13%	34%	31%	15%	6%	1%
Mix of shops	12%	33%	33%	15%	6%	1%
Crime reduction and prevention efforts	7%	25%	32%	16%	12%	9%
Efforts to manage vehicle traffic	4%	16%	29%	24%	24%	3%
Efforts to manage bicycle traffic	4%	15%	25%	23%	28%	5%

- While most residents agree that they like to support local merchants doing business in Kailua Town (85%) --- and more residents agree (47%) than disagree (24%) that tourism is necessary for the success of local merchants --- these sentiments are not strong enough to offset feelings regarding the negative impact of tourism on their household.
- Five in eight respondents (62%) indicated that tourism has had a negative impact on their household's overall quality of life. Survey data show that these negative impacts are manifested in the form of increased traffic, crowds, bicycle and pedestrian issues, and the influx of tour buses.
- The most frequent mentions regarding desired changes/improvements for Kailua Town were managing traffic, limiting short-term vacation rentals and tour buses, bicycle and pedestrian safety, addressing the homeless situation, cleaning up public parks and beaches, and increased police presence. Furthermore, Kailua residents want to see retention of locally-owned businesses, a limit to the number of big box stores or stores with merchandise not geared toward locals, and improvements to the parking situation around Kailua Town.

- When asked which organization they believe will act in the interests of Kailua, survey respondents ranked the Neighborhood Board ahead of the City and State governments and A&B. They also indicated that A&B needs to better communicate with the residents of Kailua.

	5 - Trust a Great Deal	4 Rating	3 Rating	2 Rating	1 - Do Not Trust At All	Don't Know / Left Blank
Neighborhood Board	15%	31%	24%	9%	5%	16%
Kailua Chamber of Commerce	7%	23%	29%	13%	7%	20%
City & State Government	3%	13%	33%	23%	16%	13%
A&B	3%	11%	23%	19%	23%	21%

- Feelings about Pali Lanes were found to be mixed, although residents were more likely to support *keeping Pali Lanes as is* (56%); versus *replacing the Pali Lanes structure and repurposing the area* (35%) or *retaining the Pali Lanes structure and repurposing the building* (16%). Residents do want to see the types of improvements proposed in the survey in Kailua Town. There also is some preference to upgrade the bowling facilities.

	5 - Strongly agree	4 rating	3 rating	2 rating	1 - Strongly disagree	Don't Know / Left Blank
Keep Pali Lanes and surrounding area as is	43%	13%	11%	7%	11%	14%
Replace the Pali Lanes structure and repurpose the area to allow for uses such as green open space, social gathering area, town center, playground facility, events amphitheater, or special events venue	23%	12%	10%	6%	33%	17%
Retain the Pali Lanes structure but repurpose the building for uses other than bowling	8%	8%	11%	12%	39%	22%

- Some of the pushback against replacing Pali Lanes appears to be related to trust issues with A&B (people doubt that A&B will do what they say they'll do in repurposing the property) or concerns that doing so would fuel current problems with the homeless population (by providing open spaces for them to congregate).
- Residents consider Kailua to be a special place because of its small town atmosphere; a residential beach community *unlike Waikiki*. They also factor in the people who live here (neighbors who all know one another) and the prevalent aloha spirit as part of what makes Kailua special, while adding in the beautiful beaches and good mix of businesses.
- Many, however, feel that the specialness of Kailua is being lost with all the changes occurring, placing the primary blame for this on the influx of tourists. While some describe these changes as “progress” and welcome visitors and tourists to their town, these residents appear to be in the minority.

To view this summary of results online, please visit kailuatownhi.com/survey. For questions regarding the survey results, contact kailuafeedback@abhi.com.