



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

Statewide Consumer Survey

Prepared for:
Hawai'i Association of REALTORS®

October 2016

Executive Summary

Executive Summary

This is a summary of findings from a phone survey conducted in September 2016 to gauge public opinion on various issues affecting residents in their community. The survey was conducted among 658 Hawaii residents.

- Traffic is the most frequent issue cited— with 23% of residents saying it is the one most pressing issue that their community faces. While the most frequently cited issue differs across islands, traffic can always be found in the top three.
- 86% of residents agreed that traffic was an important issue facing their community. Those feelings were intensified for residents along the Leeward coast, and from Ewa Beach through Aiea who are impacted by rail construction. They were more likely than others to have strongly agreed with the statement.
- Despite concerns regarding traffic, only 43% of Oahu residents were supportive of extending the GET tax beyond 2027 to pay for rail completion and even fewer (21%) would support a property tax increase to pay for it.

Executive Summary

This is a summary of findings from a phone survey conducted in September 2016 to gauge public opinion on various issues affecting residents in their community and attitudes towards real estate agents/REALTORS®. The survey was conducted among 658 Hawaii state residents.

- -=
- 85% of Hawaii residents agreed that the lack of affordable housing is an important issue affecting their community. Makaha/Waianae/Nanakuli and Maui residents were more likely other communities to have strongly agreed with the statement.
- There is strong support for allowing short-term rentals in residential neighborhoods, with 7 out of 10 (73%) of residents statewide wanting to allow some form of short-term rental.
- In this current economy, 51% of Hawaii residents agreed that it is a good time to sell a house while 59% agreed that it is a good time to buy a house.

Objectives and Methodology

Objectives and Methodology

The overall objective of this research was:

TO GAUGE PUBLIC OPINION ON KEY ISSUES PERTINENT TO THE HAWAII ASSOCIATION OF REALTORS FOR GOVERNMENT AND COMMUNITY RELATIONS PURPOSES.

Data from this survey was collected from September 6 to September 19, 2016. A phone survey was conducted with a 22%/78% landline to cell phone split. A total of n=658 surveys were completed, resulting in a maximum margin of error of +/- 3.82% at 95% confidence level.

Thirteen communities (listed on page 9) were designated by the Hawaii Association of REALTORS (HAR) and a minimum of 50 surveys were conducted within each community. In order to more appropriately represent the total population, the final data file was weighted by community area and age in order to match 2010 U.S. Census data for the state of Hawaii. Unless otherwise noted, subsample differences identified in the narrative are statistically significant at the $p < .05$ level.

The survey developed by Ward Research and submitted to the client for review and approval. Data processing was accomplished by Ward Research using SPSS for Windows and data tables were created using Wincross. Wincross allows for cross-tabulation of data by key variables and for statistical testing.

Community Issues

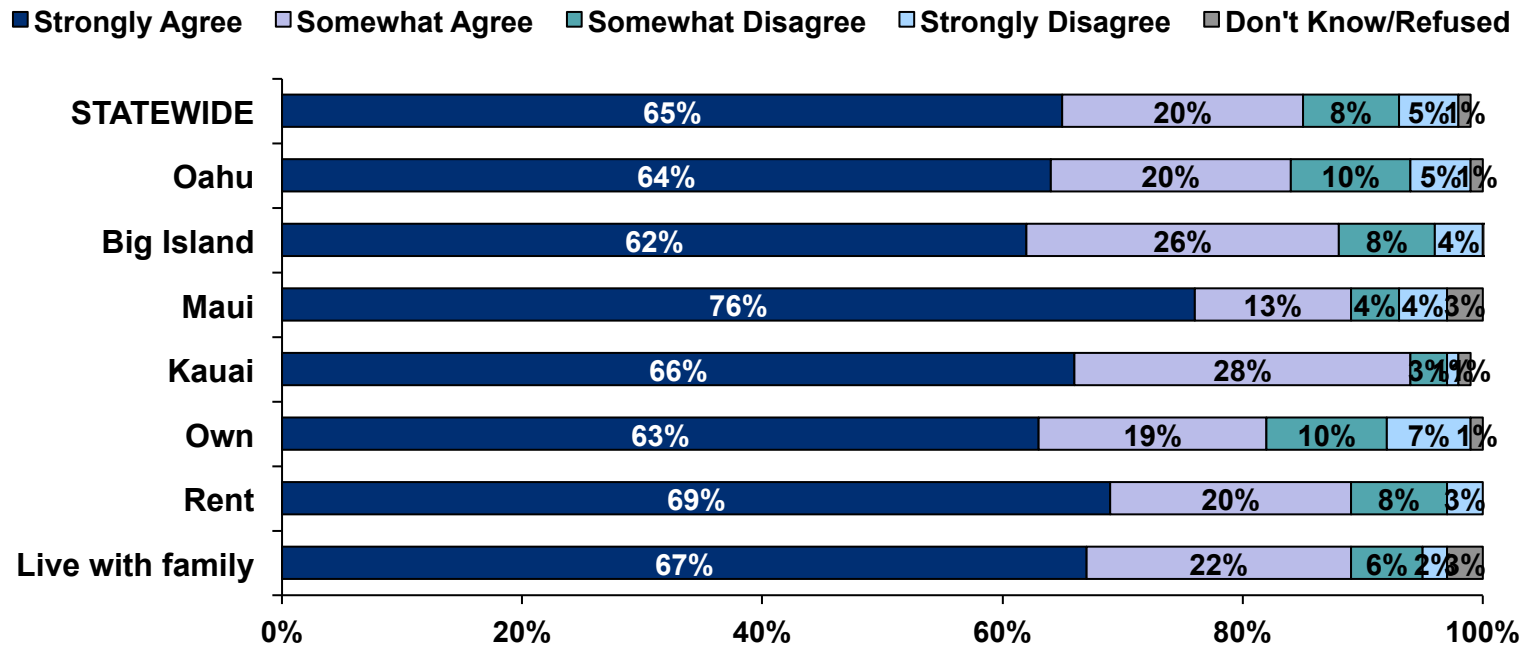
Top Issue

- First, respondents were asked to think about hot topic issues and focus on whether or not each impacted their community or the area where they reside. Each respondent was asked:
 - *Our state is made up of many diverse and unique communities. As such, please think about your community or the area of the island where you live and issues that it faces. What would you say is the most pressing issue?*
- When asked to name the top issue facing your community, or the area of the island where you live – the three most frequent responses statewide were traffic (23%), homelessness (18%), and the need for affordable housing (6%).
- Respondents feel that traffic is a major issue that needs to be addressed. Traffic is the most frequent complaint by respondents in 8 (of 13) communities and the second most frequent in 3 other communities.
- Beyond the top mention, there is a diverse range of issues at the community level and also at the island level. In fact, the top three issues differ across islands:
 - Oahu: Traffic (27%), homelessness (22%), and affordable housing (5%).
 - Big Island: Homelessness (16%), drugs (12%), and traffic (10%).
 - Maui: Affordable housing (17%), traffic (16%), and public education (7%).
 - Kauai: Traffic (19%), environmental issues (13%), and crime/public safety (12%).
- The table on the next page reveals differences on a state, island, and community level on the most pressing issue residents feel that needs to be addressed in their community.

Community Issues - Housing

- 85% of Hawaii residents agreed that the lack of affordable housing is an important issue affecting their community.
- Interestingly, there were no significant differences by island nor housing status, due to overwhelming agreement across the board.

“The lack of affordable housing is an important issue facing my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“The lack of affordable housing is an important issue facing my community.”

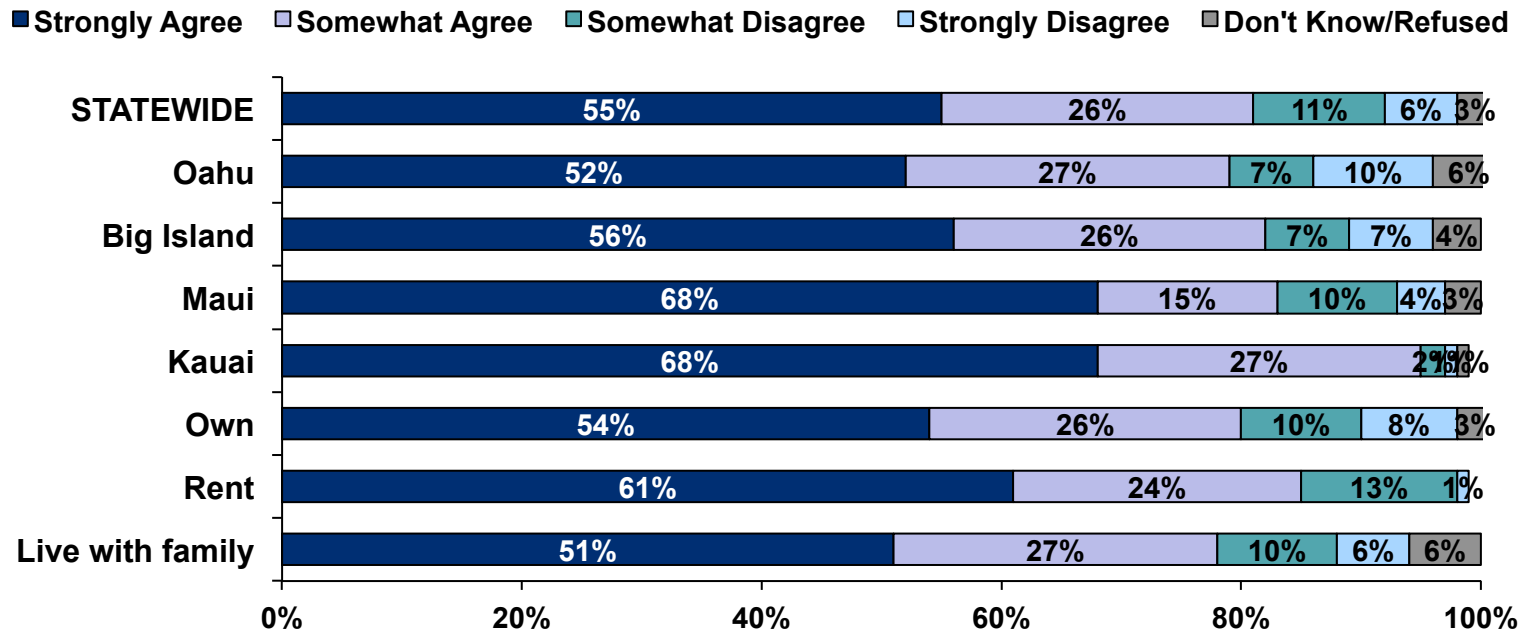
- Makaha/Waianae/Nanakuli residents on Oahu and residents on Maui were more likely other communities to have strongly agreed that the lack of affordable housing is an important issue facing their community.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	65%	20%	8%	5%	1%
Oahu (n=407)	64	20	10	5	1
<i>East Honolulu (n=51)</i>	64	19	12	3	1
<i>Urban Honolulu (n=52)</i>	66	15	11	7	2
<i>Aiea/Pearl City (n=51)</i>	46	37	13	5	0
<i>Wahiawa/Mililani/Waipahu(n=50)</i>	67	22	2	7	2
<i>Ewa/Kapolei/Makakilo(n=51)</i>	53	25	15	2	4
<i>Makaha/Waianae/Nanakuli (n=52)</i>	79	10	3	8	0
<i>North Shore/Laie (n=50)</i>	65	20	14	1	0
<i>Windward Oahu (n=50)</i>	68	20	11	1	0
Big Island (n=100)	62	26	8	4	1
<i>East Hawaii (n=50)</i>	59	29	9	2	2
<i>West Hawaii (n=50)</i>	66	21	6	6	0
Maui (n=100)	76	13	4	4	3
<i>Kahului/Wailuku (n=50)</i>	74	14	8	2	4
<i>Rest of Maui (n=50)</i>	77	13	2	5	2
Kauai (n=51)	66	28	3	1	1

Community Issues - Housing

- Now asked about “available” housing, 81% of Hawaii residents agreed that the lack of available housing is an important issue affecting their community. There was a difference in intensity of agreement, as Maui and Kauai residents were more likely than Oahu residents to have strongly agreed that the lack of available housing is an important issue.
- Again, there were no differences by housing status.

“The lack of available housing is an important issue facing my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“The lack of available housing is an important issue facing my community.”

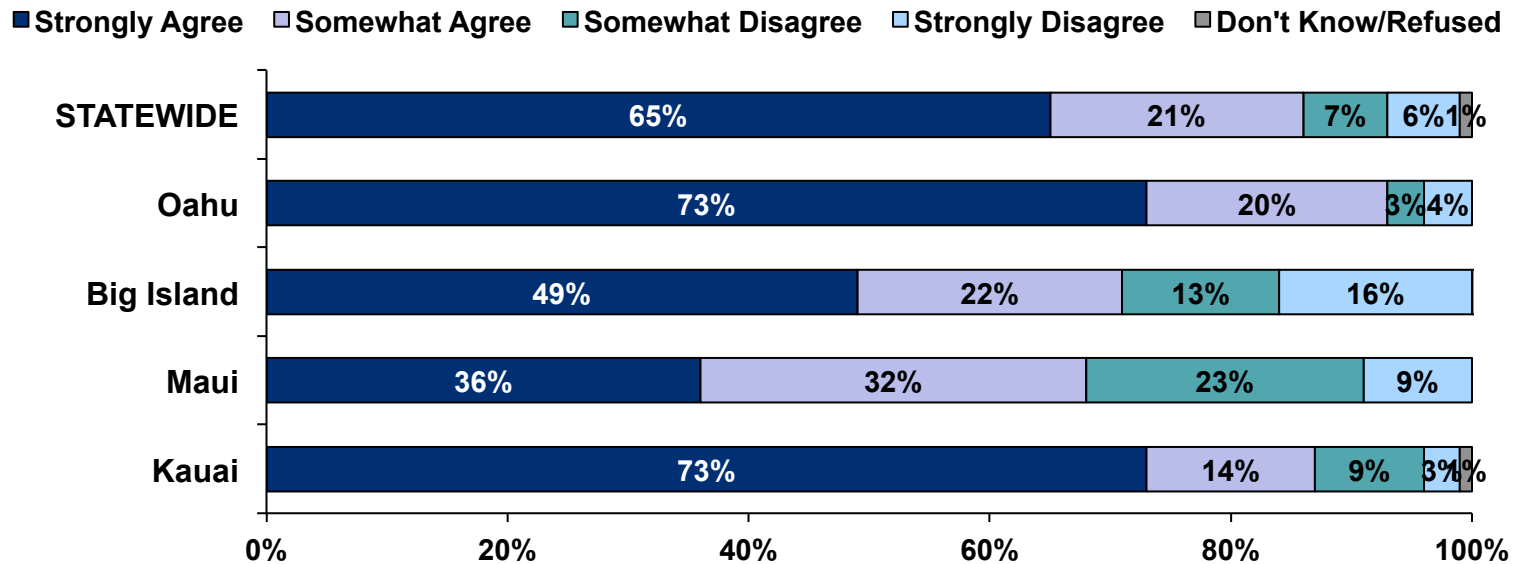
- Residents of Ewa/Kapolei/Makakilo, Aiea/Pearl City, and East Honolulu were less likely other communities to have strongly agreed that the lack of available housing is an important issue facing their community.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	55%	26%	11%	6%	3%
Oahu (n=407)	52	27	7	10	6
East Honolulu (n=51)	29	48	16	5	2
Urban Honolulu (n=52)	56	26	13	4	1
Aiea/Pearl City (n=51)	37	38	6	10	9
Wahiawa/Mililani/Waipahu(n=50)	60	25	7	4	4
Ewa/Kapolei/Makakilo(n=51)	37	21	18	19	5
Makaha/Waianae/Nanakuli (n=52)	53	21	12	11	3
North Shore/Laie (n=50)	61	24	11	3	0
Windward Oahu (n=50)	57	27	13	4	0
Big Island (n=100)	56	26	7	7	4
East Hawaii (n=50)	51	27	7	10	6
West Hawaii (n=50)	63	25	8	2	2
Maui (n=100)	68	15	10	4	3
Kahului/Wailuku (n=50)	63	17	12	4	4
Rest of Maui (n=50)	71	13	9	5	2
Kauai (n=51)	68	27	2	1	1

Community Issues - Traffic

- Traffic congestion was the most frequently-cited community issue in the state, so it is no surprise that such a large percentage (86%) of Hawaii residents agreed that it is an important issue facing their community. Also, Oahu and Kauai residents were more likely than Maui and Big Island residents to have agreed that traffic is an important issue facing their community which mirrors traffic being the #1 top-of-mind community issue for those islands.

“Traffic congestion is an important issue facing my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“Traffic congestion is an important issue facing my community.”

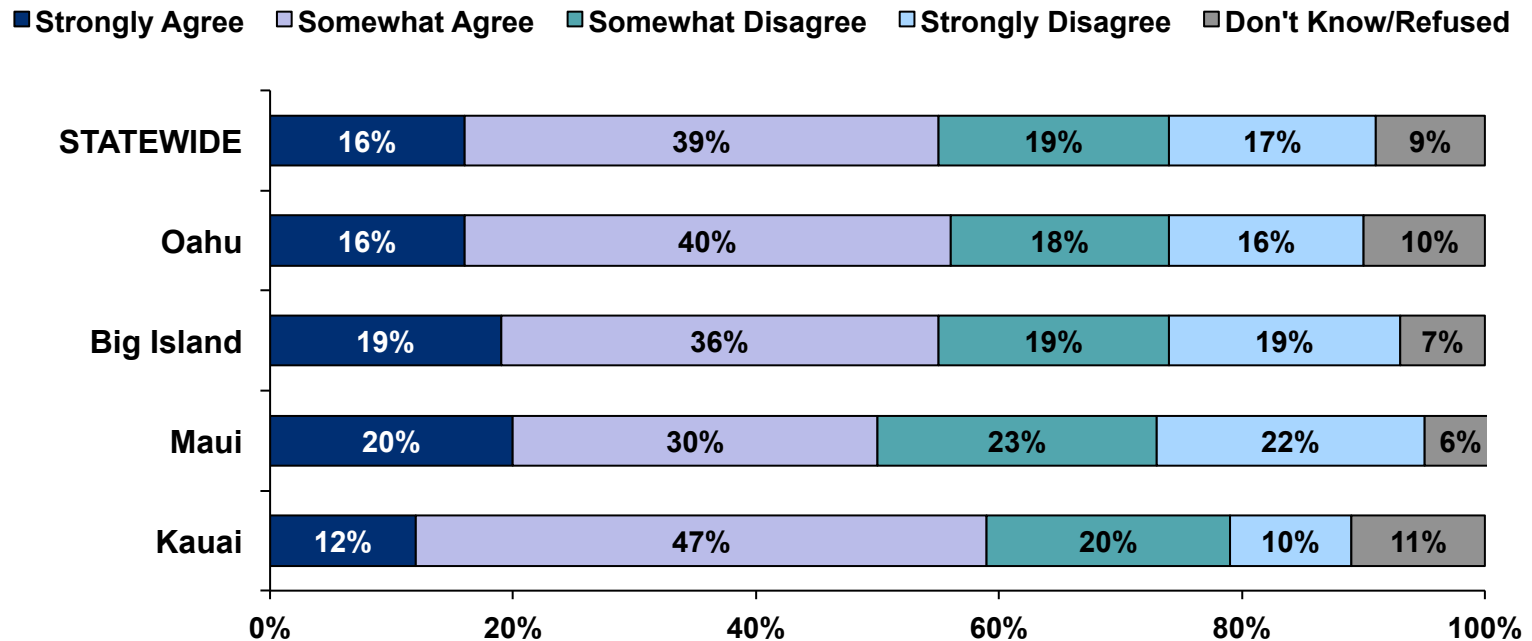
- Reflecting West Oahu traffic and the rail construction congestion, all residents of Makaha/Waianae/Nanakuli and over 80% of Ewa/Kapolei/Makakilo and Aiea/Pearl City strongly agreed that traffic is an issue.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	65%	21%	7%	6%	1%
Oahu (n=407)	73	20	3	4	0
East Honolulu (n=51)	73	21	0	5	1
Urban Honolulu (n=52)	73	22	2	3	0
Aiea/Pearl City (n=51)	82	13	2	3	0
Wahiawa/Mililani/Waipahu(n=50)	62	25	4	9	0
Ewa/Kapolei/Makakilo(n=51)	88	10	2	0	0
Makaha/Waianae/Nanakuli (n=52)	100	0	0	0	0
North Shore/Laie (n=50)	65	21	3	11	0
Windward Oahu (n=50)	57	29	11	3	0
Big Island (n=100)	49	22	13	16	1
East Hawaii (n=50)	45	22	13	18	2
West Hawaii (n=50)	54	20	12	13	0
Maui (n=100)	36	32	23	9	0
Kahului/Wailuku (n=50)	39	22	28	10	0
Rest of Maui (n=50)	35	36	21	8	0
Kauai (n=51)	73	14	9	3	1

Community Issues - Education

- A little over half (55%) of Hawaii residents agreed that most of the public school students in their community are receiving an excellent education. There were no significant differences across island.
- Those who live with family were more likely than renters and homeowners to have agreed with the statement.

“Most of the public school students in my community are receiving an excellent education.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“Most of the public school students in my community are receiving an excellent education.”

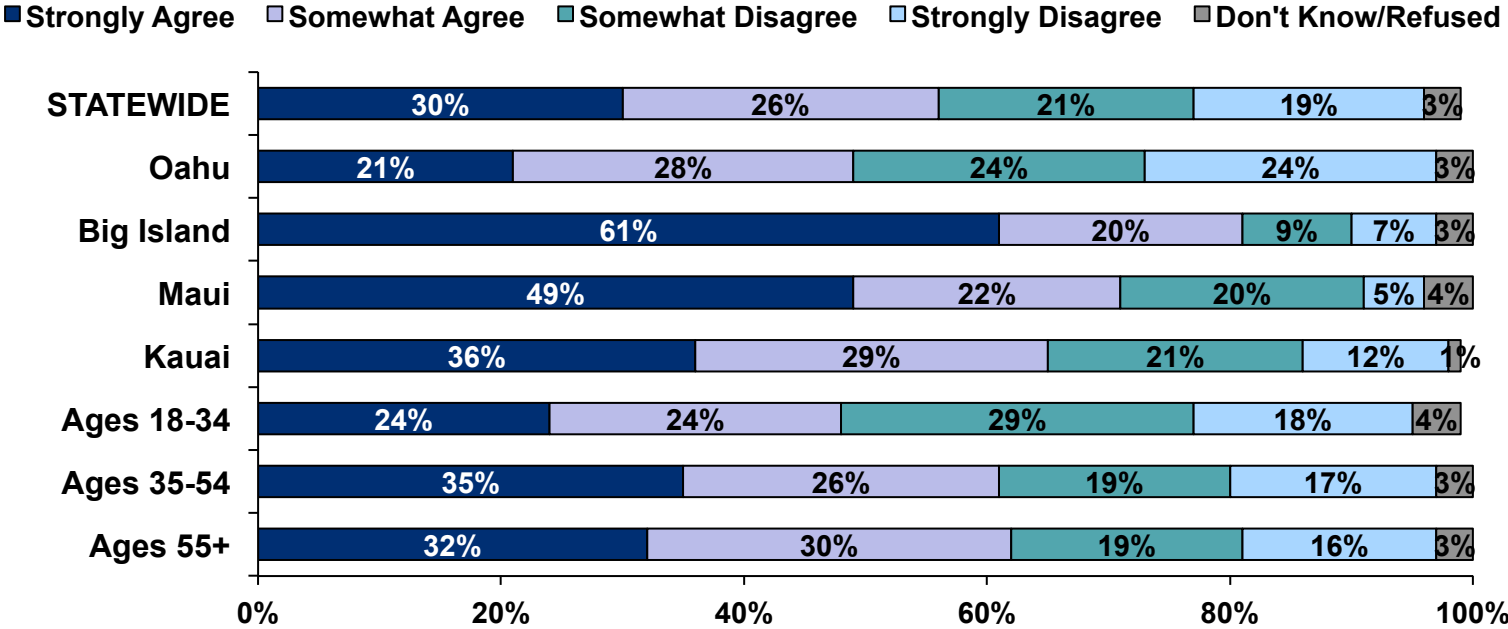
- At least 20% of residents of Makaha/Waianae/Nanakuli, West Hawaii, and Maui (outside of Kahului/Wailuku) strongly disagreed with this statement.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	16%	39%	19%	17%	9%
Oahu (n=407)	16	40	18	16	10
East Honolulu (n=51)	30	40	13	5	12
Urban Honolulu (n=52)	12	37	20	18	14
Aiea/Pearl City (n=51)	14	54	13	7	13
Wahiawa/Mililani/Waipahu(n=50)	30	32	19	11	8
Ewa/Kapolei/Makakilo (n=51)	21	41	14	19	5
Makaha/Waianae/Nanakuli (n=52)	7	42	19	27	5
North Shore/Laie (n=50)	22	32	19	19	9
Windward Oahu (n=50)	18	40	14	17	11
Big Island (n=100)	19	36	19	19	7
East Hawaii (n=50)	21	37	20	17	6
West Hawaii (n=50)	14	35	19	24	7
Maui (n=100)	20	30	23	22	6
Kahului/Wailuku (n=50)	37	27	16	10	10
Rest of Maui (n=50)	12	31	24	31	2
Kauai (n=51)	12	47	20	10	11

Community Issues - Medical Care

- Over half (56%) of Hawaii residents agreed that there is a lack of quality doctors and medical care in their community. Big Island and Maui residents were more likely than Oahu residents to have agreed about the lack of quality doctors and medical care in their community.
- Residents ages 35 and up were more likely than those ages 18-34 to have agreed with the statement.

“There is a lack of quality doctors and medical care in my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“There is a lack of quality doctors and medical care in my community.”

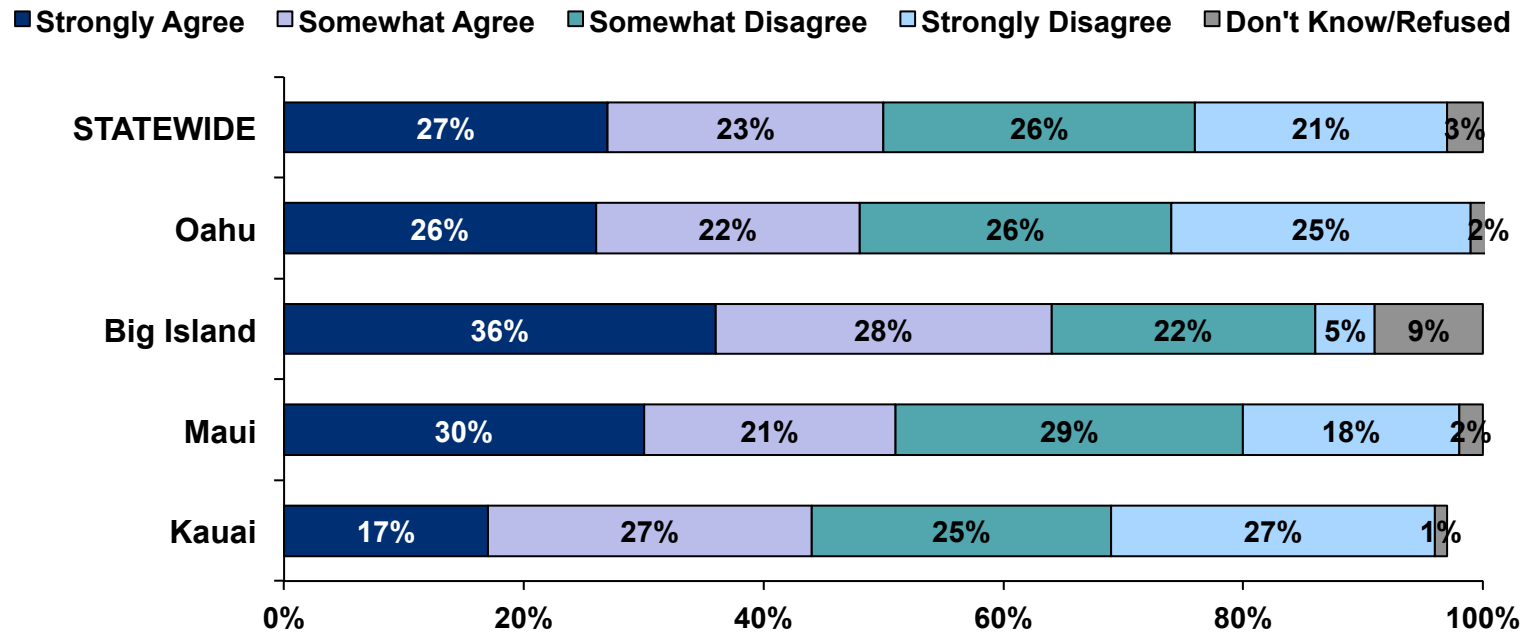
- In addition to Maui/Big Island, over 30% of Makaha/Waianae/Nanakuli, Wahiawa/Mililani/Waipahu, and Kauai were in strong agreement about the lack of quality doctors and medical care.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	30%	26%	21%	19%	3%
Oahu (n=407)	21	28	24	24	3
East Honolulu (n=51)	6	29	37	20	8
Urban Honolulu (n=52)	19	26	26	27	2
Aiea/Pearl City (n=51)	28	28	11	31	2
Wahiawa/Mililani/Waipahu(n=50)	31	27	15	23	4
Ewa/Kapolei/Makakilo(n=51)	20	30	27	21	3
Makaha/Waianae/Nanakuli (n=52)	37	32	15	14	3
North Shore/Laie (n=50)	21	37	27	14	1
Windward Oahu (n=50)	13	26	30	26	5
Big Island (n=100)	61	20	9	7	3
East Hawaii (n=50)	61	27	5	5	2
West Hawaii (n=50)	61	9	15	11	5
Maui (n=100)	49	22	20	5	4
Kahului/Wailuku (n=50)	53	27	15	5	0
Rest of Maui (n=50)	46	20	23	5	6
Kauai (n=51)	36	29	21	12	1

Community Issues - Public Transit

- Half (50%) of Hawaii residents agreed that the lack of public transportation is an important issue facing their community. Big Island residents were more likely than Oahu and Kauai residents to have agreed that the lack of public transportation is an important issue.

“Lack of public transportation is an important issue facing my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“Lack of public transportation is an important issue facing my community.”

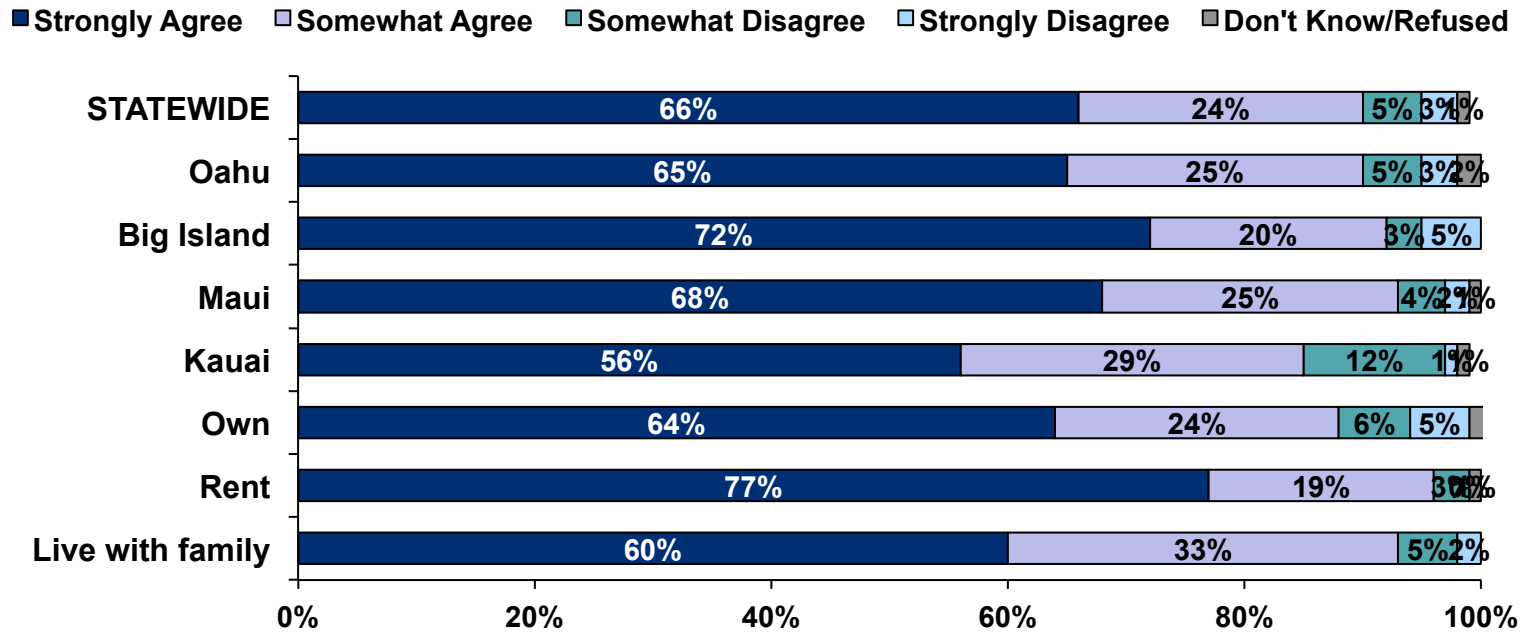
- West Hawaii residents felt the most intensely about lack of public transportation with 51% in strong agreement that it is an important issue.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	27%	23%	26%	21%	3%
Oahu (n=407)	26	22	26	25	2
East Honolulu (n=51)	11	24	43	19	3
Urban Honolulu (n=52)	32	20	23	24	2
Aiea/Pearl City (n=51)	20	24	33	20	3
Wahiawa/Mililani/Waipahu(n=50)	28	21	24	28	0
Ewa/Kapolei/Makakilo(n=51)	34	25	17	22	2
Makaha/Waianae/Nanakuli (n=52)	19	44	18	19	0
North Shore/Laie (n=50)	21	9	35	35	0
Windward Oahu (n=50)	17	15	40	24	4
Big Island (n=100)	36	28	22	5	9
East Hawaii (n=50)	27	35	24	3	10
West Hawaii (n=50)	51	20	18	7	4
Maui (n=100)	30	21	29	18	2
Kahului/Wailuku (n=50)	20	24	36	18	2
Rest of Maui (n=50)	29	23	30	17	2
Kauai (n=51)	17	27	25	27	1

Community Issues - Jobs

- 9 out of 10 (90%) Hawaii residents agreed that their communities need more jobs with better pay. There were no differences across islands.
- However, there was a difference in the intensity of agreement amongst renters, who were more likely than homeowners and those who live with family to have strongly agreed that jobs with better pay are needed.

“We need more jobs that have better pay in my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“We need more jobs that have better pay in my community.”

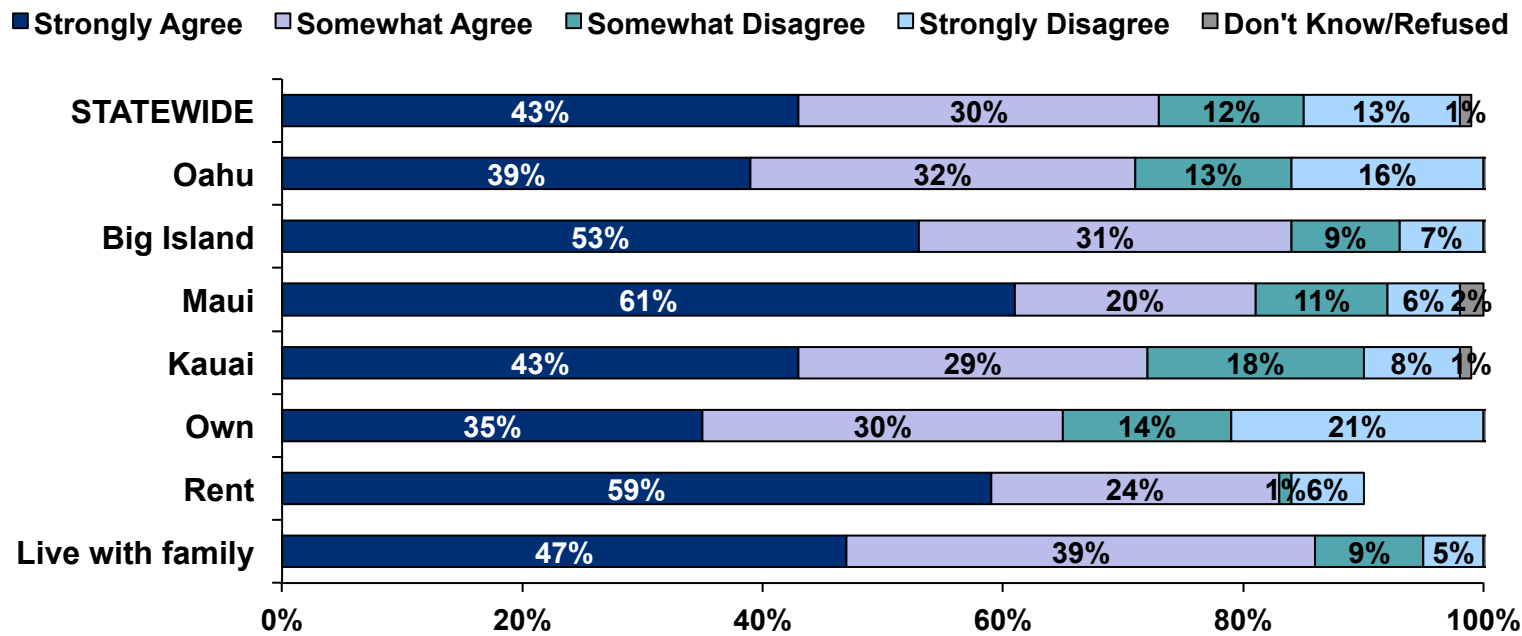
- About 8 out of 10 residents in East Hawaii and Makaha/Waianae/Nanakuli strongly agreed that their community needs jobs with better pay.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	66%	24%	5%	3%	1%
Oahu (n=407)	65	25	5	3	2
<i>East Honolulu (n=51)</i>	49	30	14	2	5
<i>Urban Honolulu (n=52)</i>	70	23	3	1	3
<i>Aiea/Pearl City (n=51)</i>	54	30	9	3	4
<i>Wahiawa/Mililani/Waipahu(n=50)</i>	65	18	11	5	2
<i>Ewa/Kapolei/Makakilo (n=51)</i>	75	22	3	0	0
<i>Makaha/Waianae/Nanakuli (n=52)</i>	88	7	3	2	0
<i>North Shore/Laie (n=50)</i>	60	28	9	2	2
<i>Windward Oahu (n=50)</i>	51	36	4	8	2
Big Island (n=100)	72	20	3	5	0
<i>East Hawaii (n=50)</i>	79	14	2	5	0
<i>West Hawaii (n=50)</i>	61	30	6	4	0
Maui (n=100)	68	25	4	2	1
<i>Kahului/Wailuku (n=50)</i>	63	32	2	0	4
<i>Rest of Maui (n=50)</i>	67	24	6	3	0
Kauai (n=51)	56	29	12	1	1

Community Issues - Low Income Housing

- Almost three-quarters (73%) of Hawaii residents agreed that they support building low-income housing in their community. Big Island and Maui residents were more likely than Oahu residents to have agreed to support low-income housing in their community.
- Similarly, renters and those who live with family were more likely than homeowners to support low-income housing in their community.

“I would support low-income housing being built in my community.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“I would support low-income housing being built in my community.”

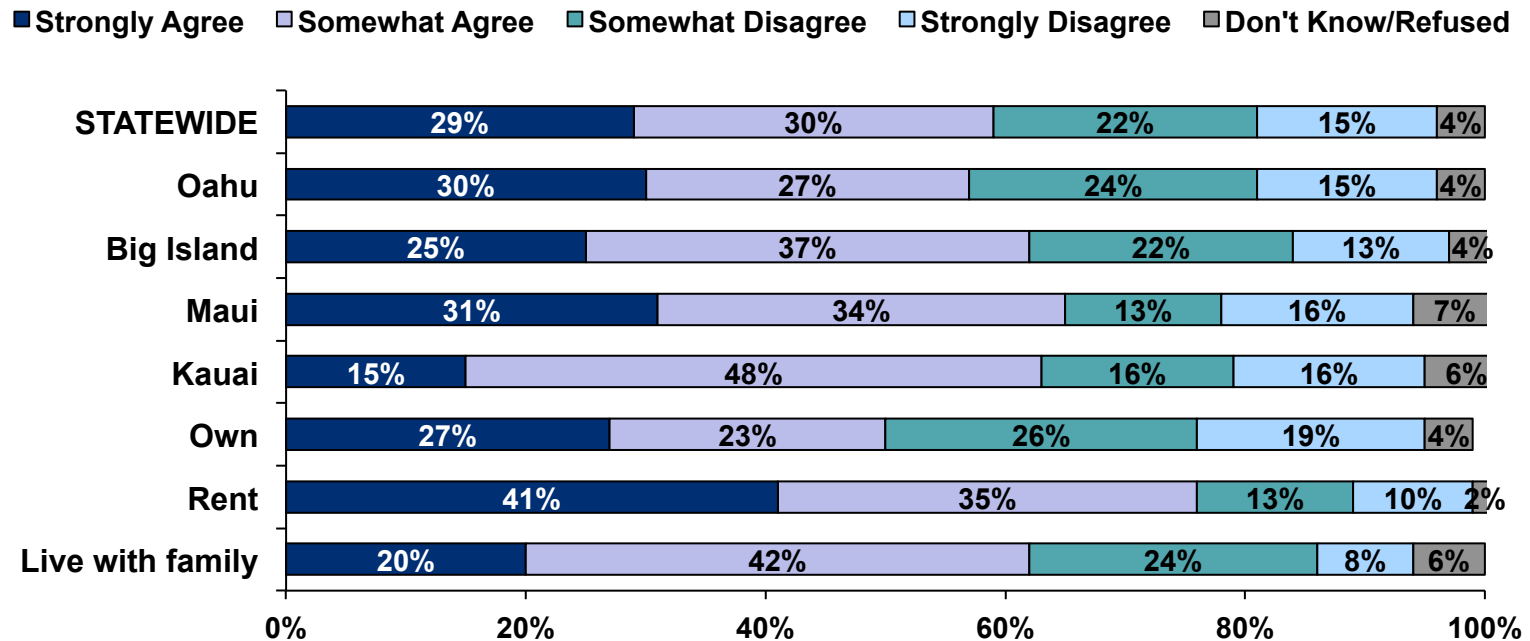
- Over 50% of residents in Big Island and Maui communities strongly agreed that they would support low-income housing in their community. The strongest disagreement came from Wahiawa/Mililani/Waipahu residents.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	43%	30%	12%	13%	1%
Oahu (n=407)	39	32	13	16	1
<i>East Honolulu (n=51)</i>	27	37	21	13	1
<i>Urban Honolulu (n=52)</i>	37	38	10	16	0
<i>Aiea/Pearl City (n=51)</i>	49	31	7	12	1
<i>Wahiawa/Mililani/Waipahu(n=50)</i>	36	26	15	23	0
<i>Ewa/Kapolei/Makakilo (n=51)</i>	45	30	12	14	0
<i>Makaha/Waianae/Nanakuli (n=52)</i>	49	29	3	19	0
<i>North Shore/Laie (n=50)</i>	49	31	9	11	0
<i>Windward Oahu (n=50)</i>	34	26	25	16	0
Big Island (n=100)	53	31	9	7	1
<i>East Hawaii (n=50)</i>	58	34	2	5	0
<i>West Hawaii (n=50)</i>	52	21	15	10	2
Maui (n=100)	61	20	11	6	2
<i>Kahului/Wailuku (n=50)</i>	62	20	4	8	5
<i>Rest of Maui (n=50)</i>	62	20	14	3	0
Kauai (n=51)	43	29	18	8	1

Community Issues - Urban Housing

- Nearly 6 out of 10 (59%) Hawaii residents agreed that they would rather increase density of urban housing rather than expand onto rural areas. There were no differences across islands.
- Renters were more likely than others to support increasing urban density.

“I would rather increase the density of housing in urban, already developed communities than expand into rural areas.”



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

“I would rather increase the density of housing in urban, already developed communities than expand into rural areas.”

- Residents in rural areas of Oahu, such as Wahiawa/Millilani/Waipahu and North Shore were more intense in their support of increasing urban density.

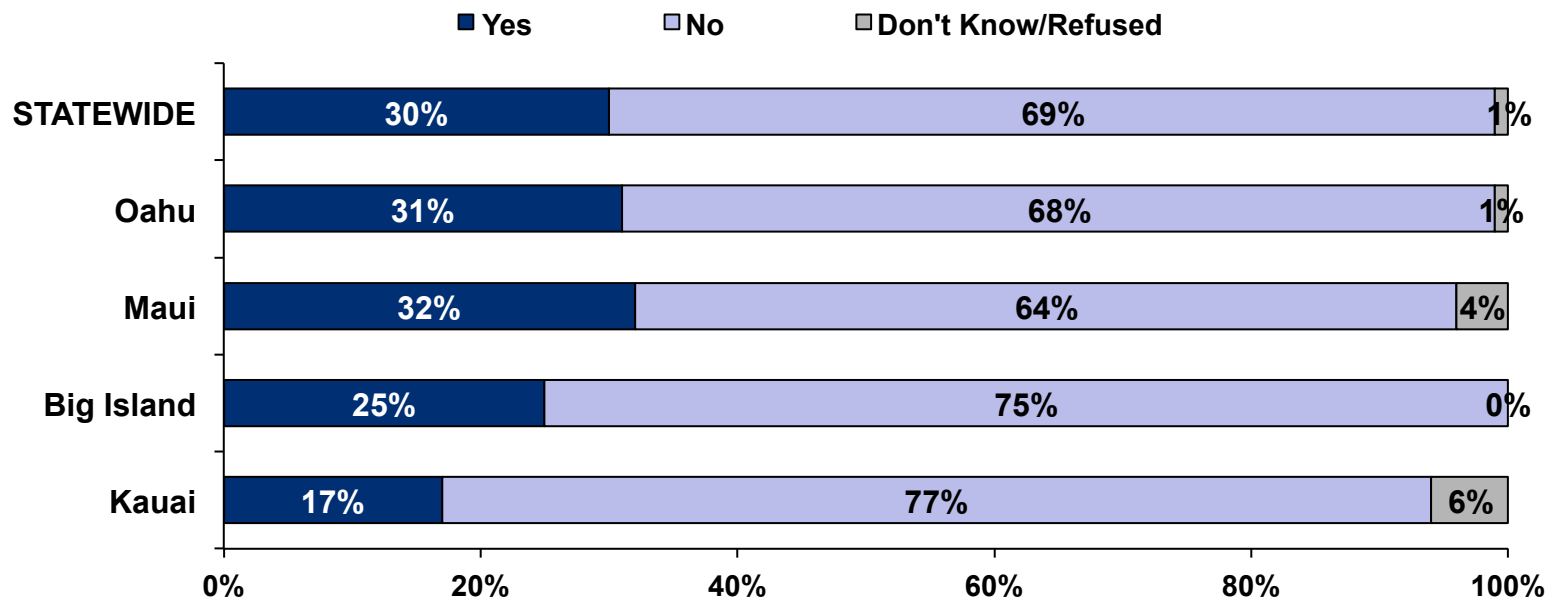
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know/Refused
TOTAL STATEWIDE (n=658)	29%	30%	22%	15%	4%
Oahu (n=407)	30	27	24	15	4
East Honolulu (n=51)	28	31	19	16	7
Urban Honolulu (n=52)	27	26	27	18	2
Aiea/Pearl City (n=51)	29	23	25	20	4
Wahiawa/Mililani/Waipahu(n=50)	38	28	20	13	2
Ewa/Kapolei/Makakilo (n=51)	29	40	21	7	2
Makaha/Waianae/Nanakuli (n=52)	19	36	27	14	3
North Shore/Laie (n=50)	36	26	19	16	3
Windward Oahu (n=50)	32	19	27	10	12
Big Island (n=100)	25	37	22	13	4
East Hawaii (n=50)	19	38	26	12	5
West Hawaii (n=50)	34	34	16	14	2
Maui (n=100)	31	34	13	16	7
Kahului/Wailuku (n=50)	30	39	16	14	2
Rest of Maui (n=50)	31	31	11	17	10
Kauai (n=51)	15	48	16	16	6

Transportation Project Taxes

New Highway Projects

- Residents were told that Governor Ige recently said there is no money to fund new highway projects as it is all being used to fund maintenance (e.g. pothole repairs) on existing roads. When polled to see if they would support an increase to the gasoline tax, vehicle weight tax and registration fees to fund new highway projects, only 3 out of 10 Hawaii residents were supportive.

Would Support Increase in Gasoline Tax, Vehicle Weight Tax and Registration Fee



Q3: Governor Ige says there is not enough money to work on new highway projects. This is due to the need to fund maintenance on existing roads such as pothole repairs and repaving. To fund new highway projects would you support an increase to the gasoline tax, vehicle weight tax and registration fee?

New Highway Projects

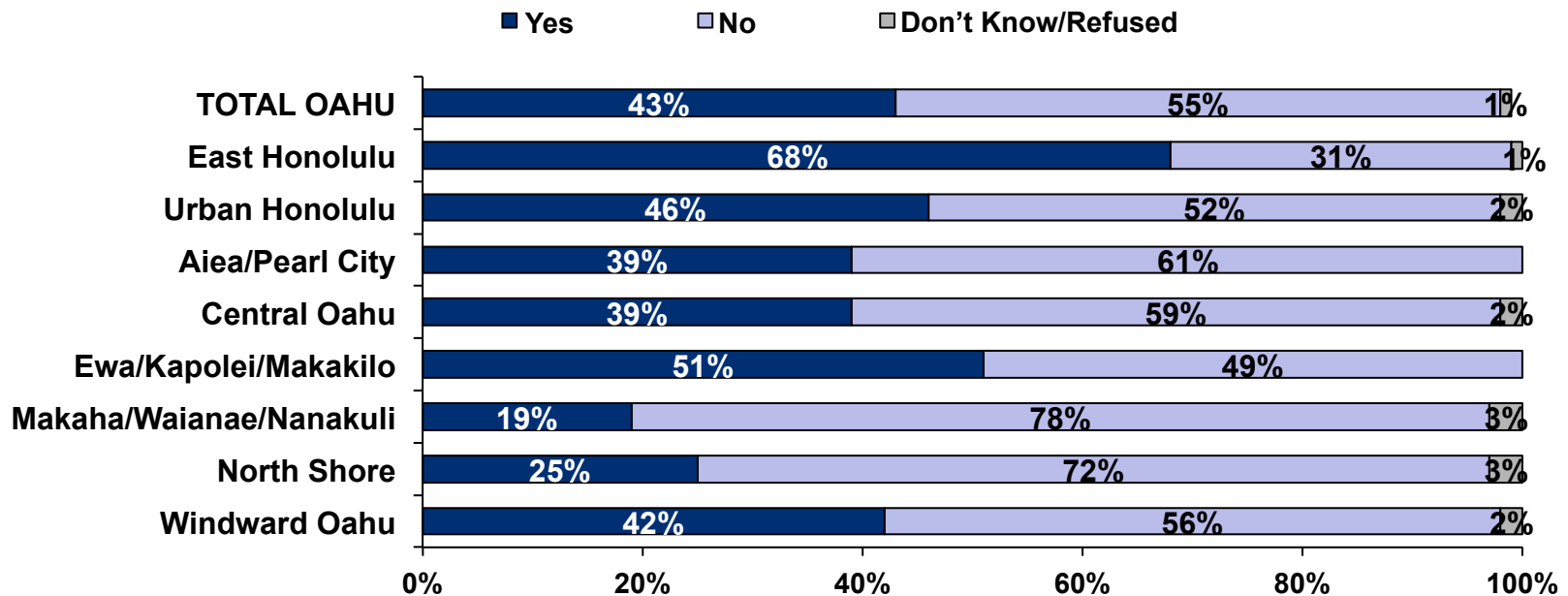
- Though East Honolulu was about evenly split, there were no communities in which support outweighed the opposition to increasing vehicle taxes and fees to fund new highway projects.

	Yes	No	Don't Know/Refused
TOTAL STATEWIDE (n=658)	30%	69%	1%
Oahu (n=407)	31	68	1
<i>East Honolulu (n=51)</i>	46	50	4
<i>Urban Honolulu (n=52)</i>	36	64	0
<i>Aiea/Pearl City (n=51)</i>	40	56	4
<i>Wahiawa/Mililani/Waipahu(n=50)</i>	20	80	0
<i>Ewa/Kapolei/Makakilo(n=51)</i>	29	71	0
<i>Makaha/Waianae/Nanakuli (n=52)</i>	17	83	0
<i>North Shore/Laie (n=50)</i>	23	75	1
<i>Windward Oahu (n=50)</i>	32	68	0
Big Island (n=100)	25	75	0
<i>East Hawaii (n=50)</i>	26	74	0
<i>West Hawaii (n=50)</i>	24	76	0
Maui (n=100)	32	64	4
<i>Kahului/Wailuku (n=50)</i>	30	70	0
<i>Rest of Maui (n=50)</i>	34	61	5
Kauai (n=51)	17	77	6

Rail Funding

- Only 4 out of 10 (43%) Oahu residents were supportive of extending the General Excise tax increase beyond 2027 to fund rail construction past Middle Street.
- East Honolulu and Ewa/Kapolei/Makakilo were the only communities with a greater percentage of residents in support of extending the tax.

Support Extending the General Excise Tax Increase Beyond 2027

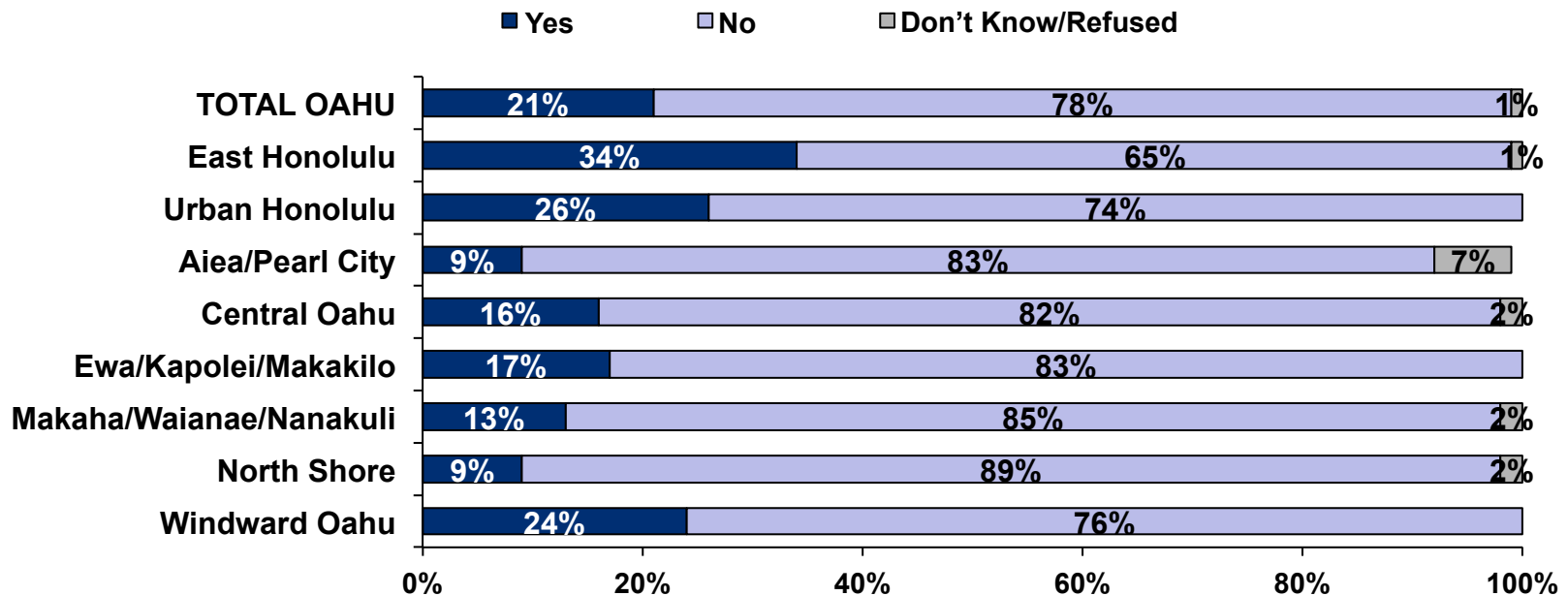


Q4a.a: On Oahu, the Honolulu Authority for Rapid Transportation, or HART, says there is not enough money to proceed with construction past Middle Street. To fund additional construction, would you support: Extending the General Excise tax increase beyond 2027

Rail Funding

- In contrast, only 2 out of 10 (21%) Oahu residents supported raising property taxes to help fund rail construction past Middle Street.

Support Raising Property Taxes

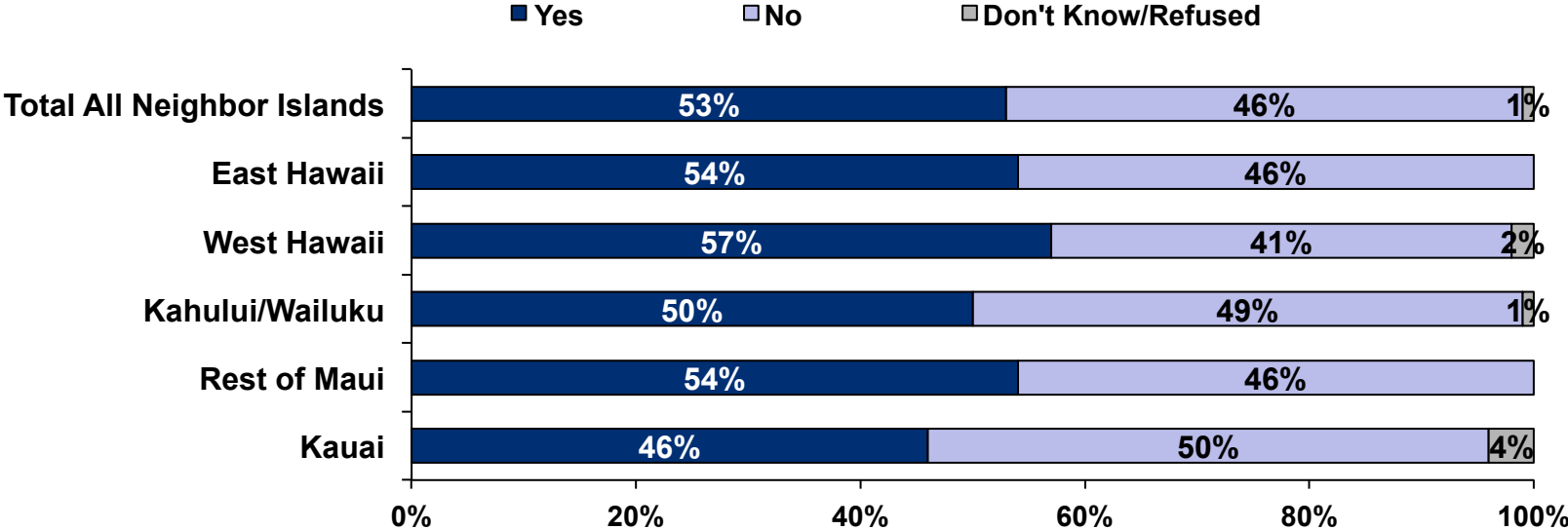


Q4a.b: On Oahu, the Honolulu Authority for Rapid Transportation, or HART, says there is not enough money to proceed with construction past Middle Street. To fund additional construction, would you support: Raising property taxes

Neighbor Island Transportation Funding

- 5 out of 10 (53%) Neighbor Island residents were supportive of a one-half percent increase on General Excise tax to fund public transportation systems.
- West Hawaii residents, who felt the most intensely about the lack of public transportation being an issue in their community, were the biggest supporters of the tax increase.

Support One-Half Percent Increase on General Excise Tax If Funds Dedicated to Public Transportation Systems



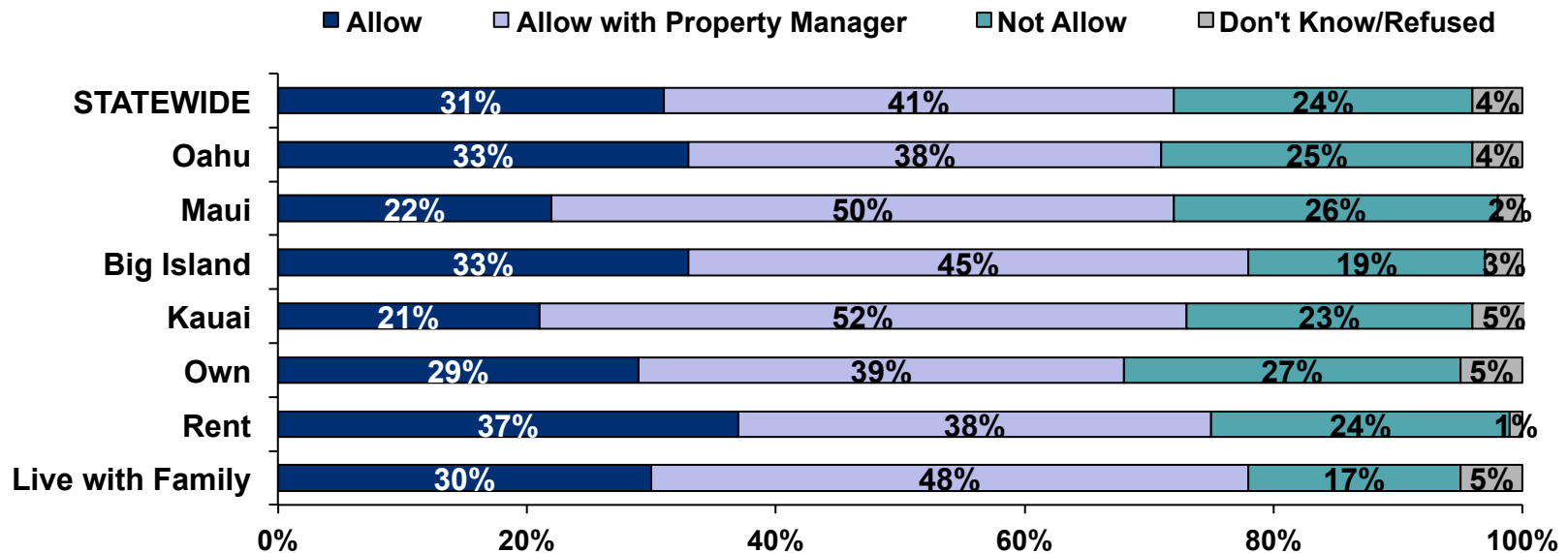
Q4b: Would you support a one-half percent increase on the General Excise Tax if the funds were dedicated to public transportation systems, including public roadways or highways, public buses, trains, ferries, pedestrian paths or sidewalks, or bicycle paths?

Short Term Rentals

Short-Term Rentals

- There is strong support for allowing short-term rentals in residential neighborhoods, with 3 out of 4 (73%) residents statewide wanting to allow some form of short-term rental.
- There were no significant differences across islands or across housing status of residents.

Position on Short-Term Rentals



Q5: Oahu currently bans most short-term rentals. Some say such accommodations destroy residential neighborhoods and must be limited and eventually eliminated. Others say there is an obvious need for more of these accommodations, and we should allow more of them with appropriate controls. Kauai and Maui County now allows for a number of short-term rental permits and requires taxes to be paid for them. Which statement best represents your position on this issue?

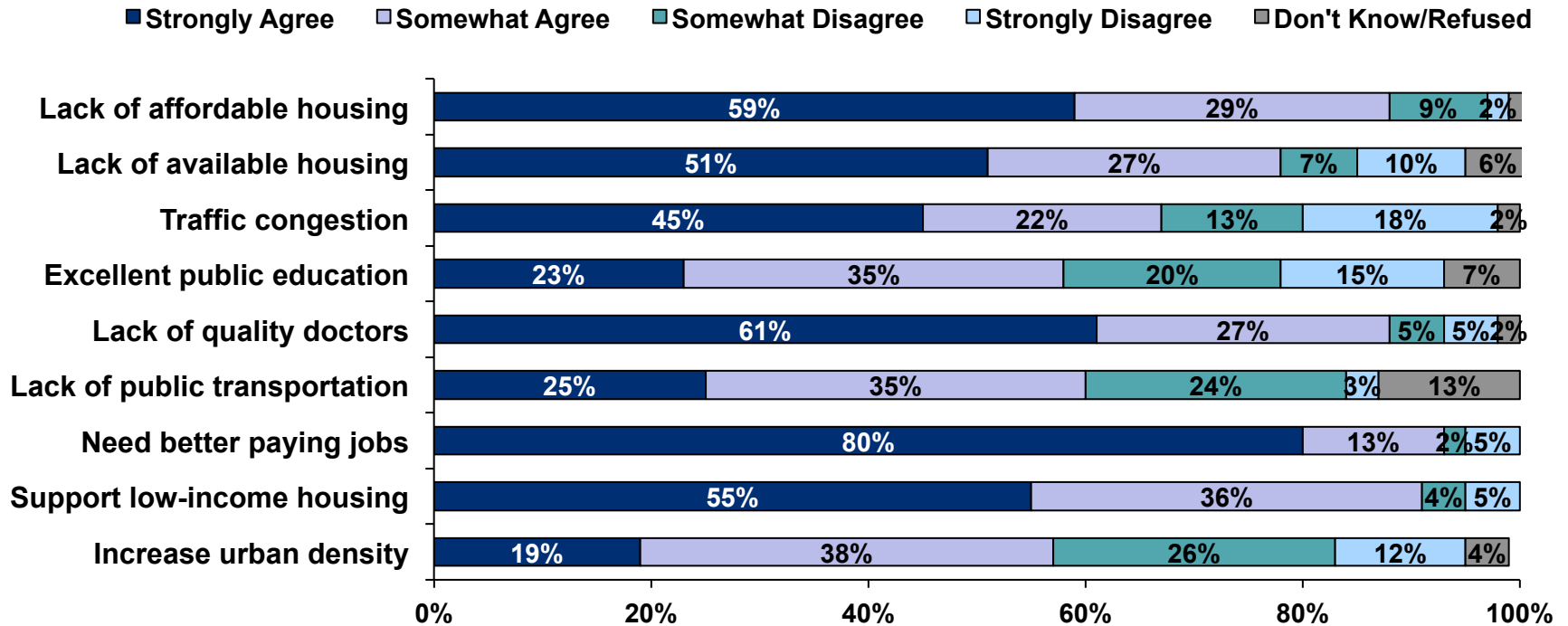
Short-Term Rentals

- While opposition was strongest on the Waianae Coast, no community registered less than 50% support (“allow” + “allow with property manager”)

	Allow	Allow with Property Manager	Not Allow	Don't Know/Refused
TOTAL STATEWIDE (n=658)	31%	41%	24%	4%
Oahu (n=407)	33	38	25	4
<i>East Honolulu (n=51)</i>	27	42	29	1
<i>Urban Honolulu (n=52)</i>	48	33	17	2
<i>Aiea/Pearl City (n=51)</i>	20	49	19	12
<i>Wahiawa/Miilani/Waipahu (n=50)</i>	26	32	34	8
<i>Ewa/Kapolei/Makakilo (n=51)</i>	22	47	26	4
<i>Makaha/Waianae/Nanakuli (n=52)</i>	33	17	42	8
<i>North Shore/Laie (n=50)</i>	26	48	21	4
<i>Windward Oahu (n=50)</i>	17	48	32	3
Big Island (n=100)				
<i>East Hawaii (n=50)</i>	40	36	19	6
<i>West Hawaii (n=50)</i>	23	57	20	0
Maui (n=100)				
<i>Kahului/Wailuku (n=50)</i>	25	41	32	2
<i>Rest of Maui (n=50)</i>	20	55	23	2
Kauai (n=51)				

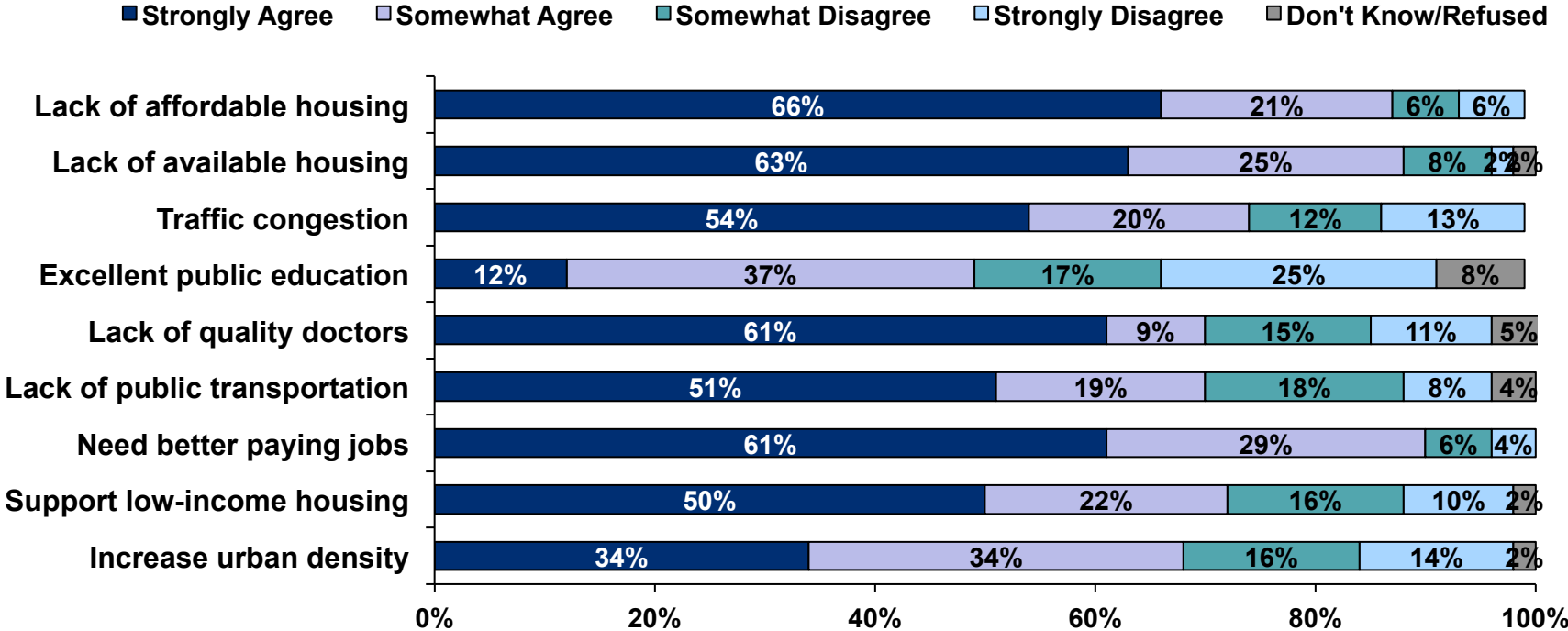
Appendix

East Hawaii



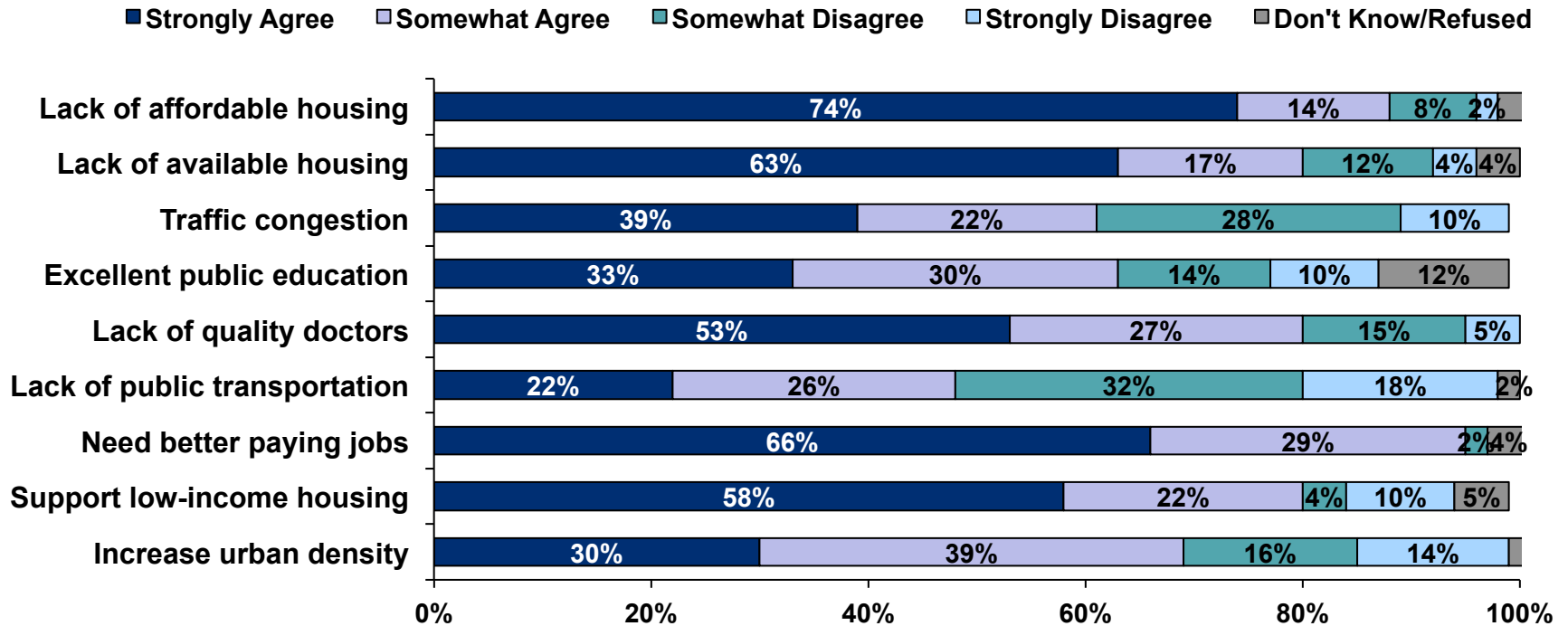
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

West Hawaii



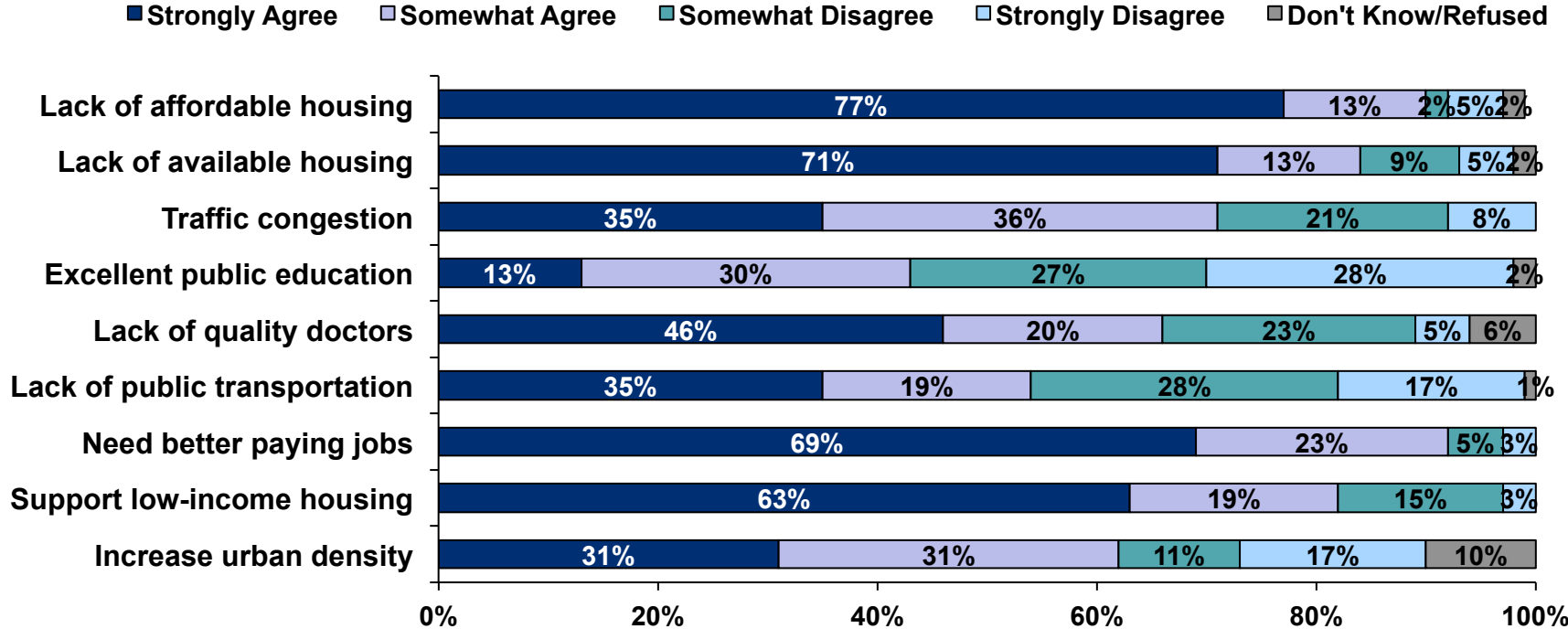
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Kahului/Wailuku Maui



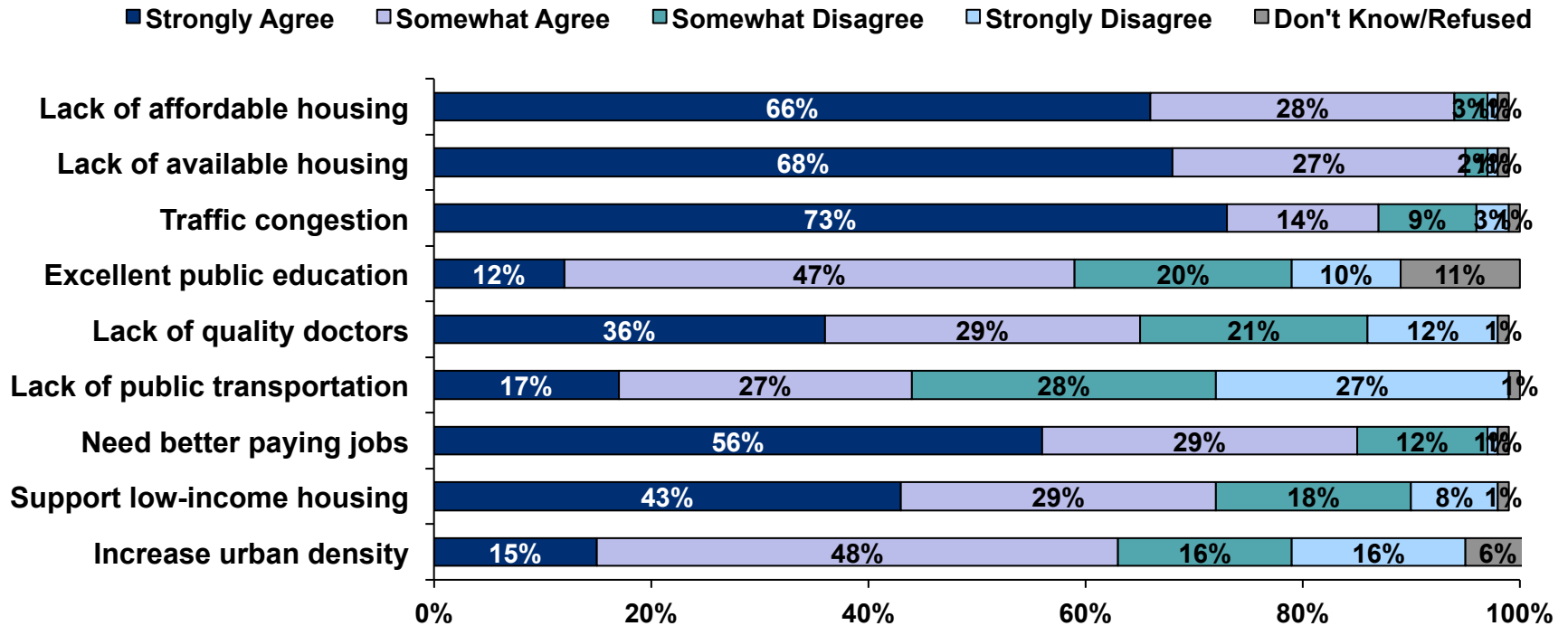
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Non-Kahului/Wailuku Maui



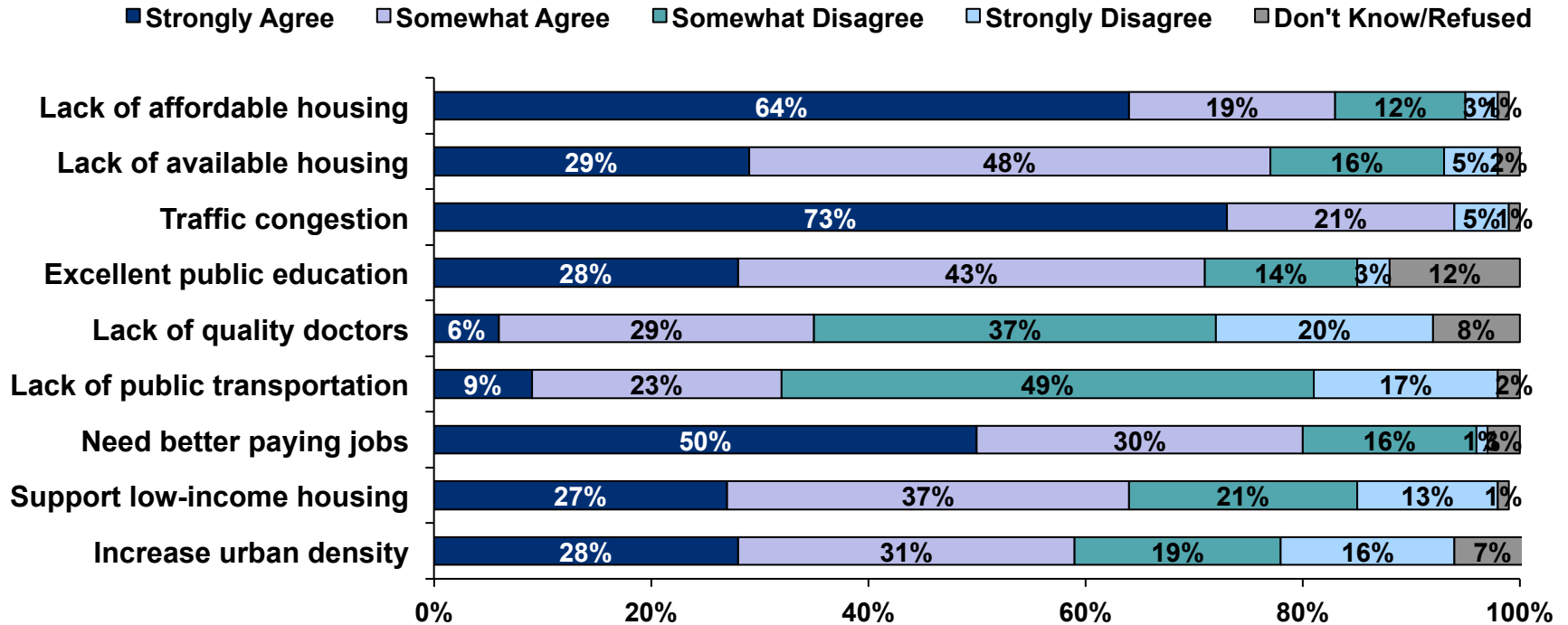
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Kauai



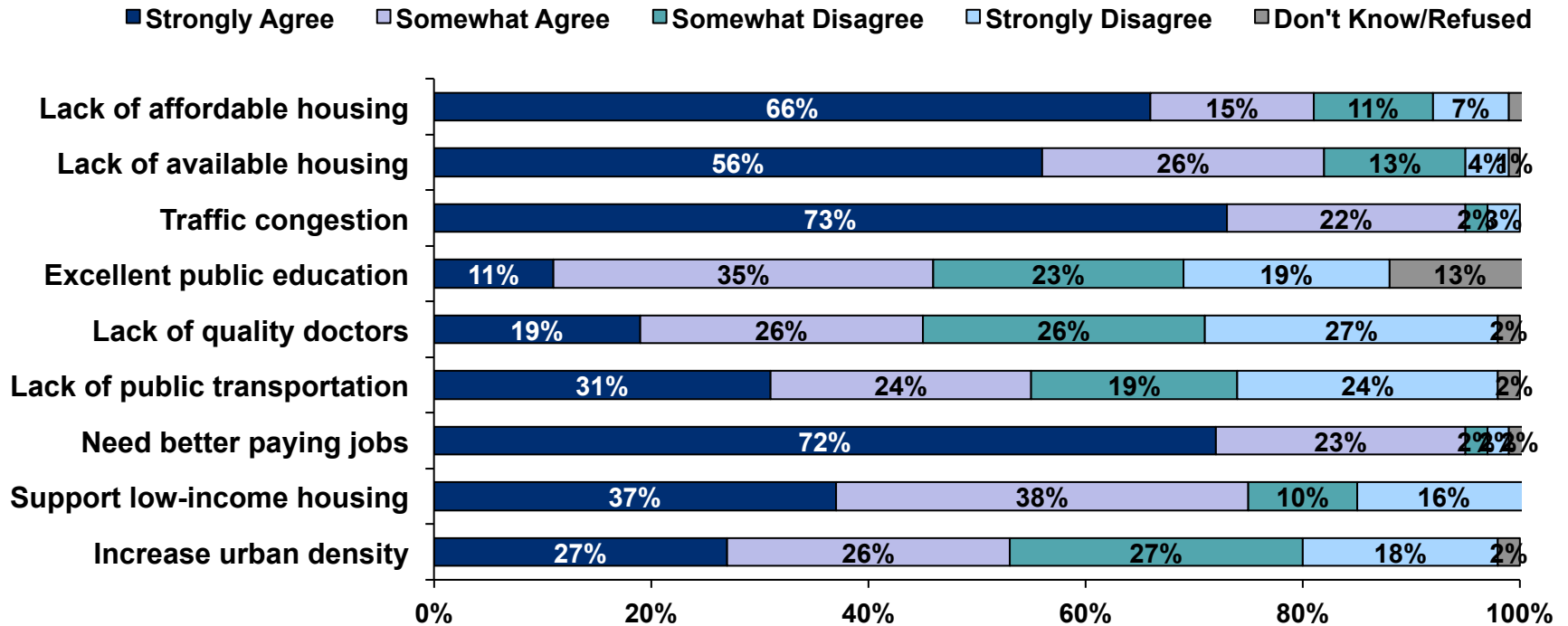
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

East Honolulu



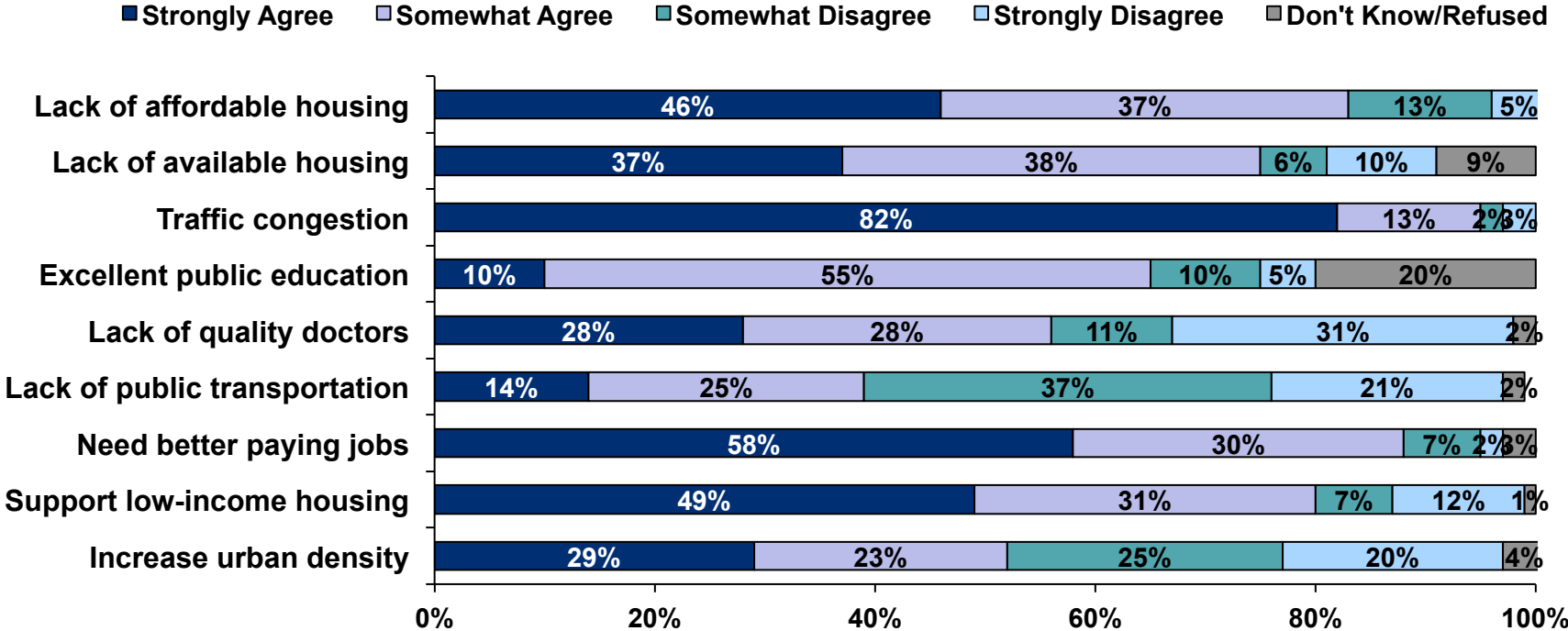
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Urban Honolulu



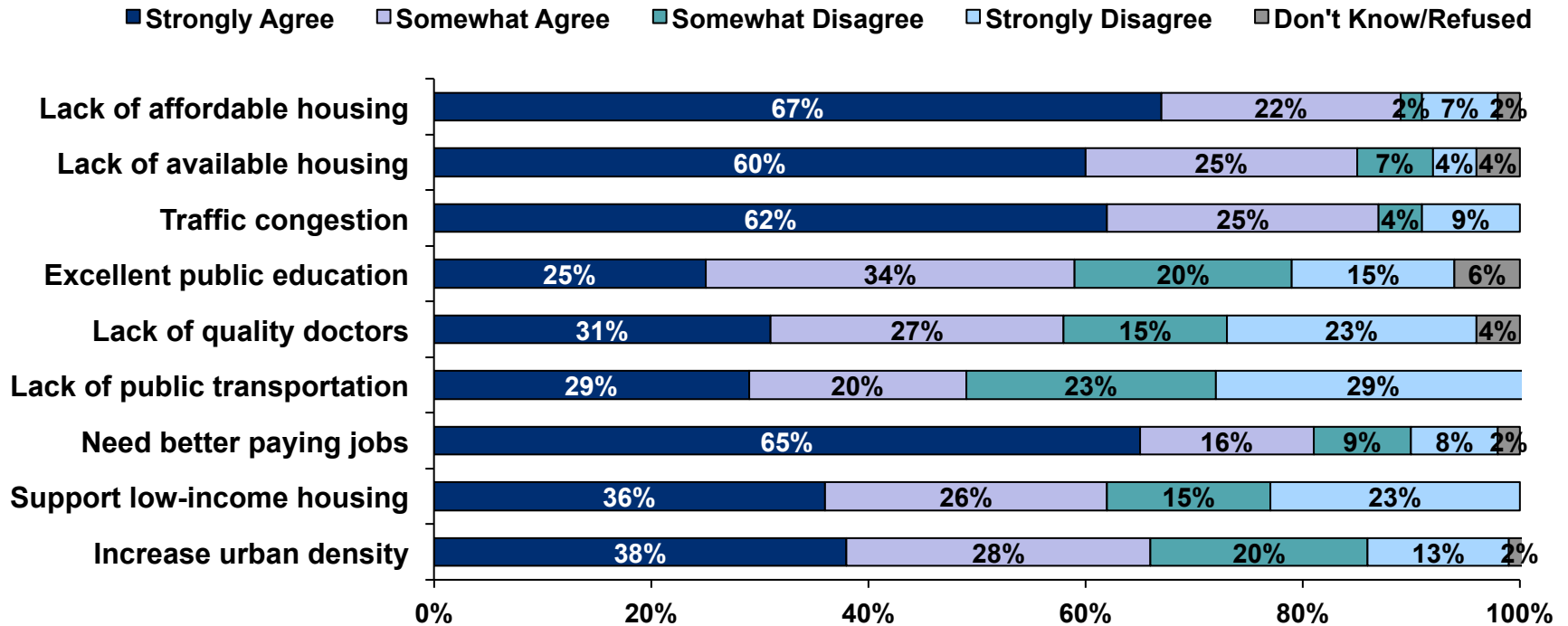
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Aiea/Pearl City



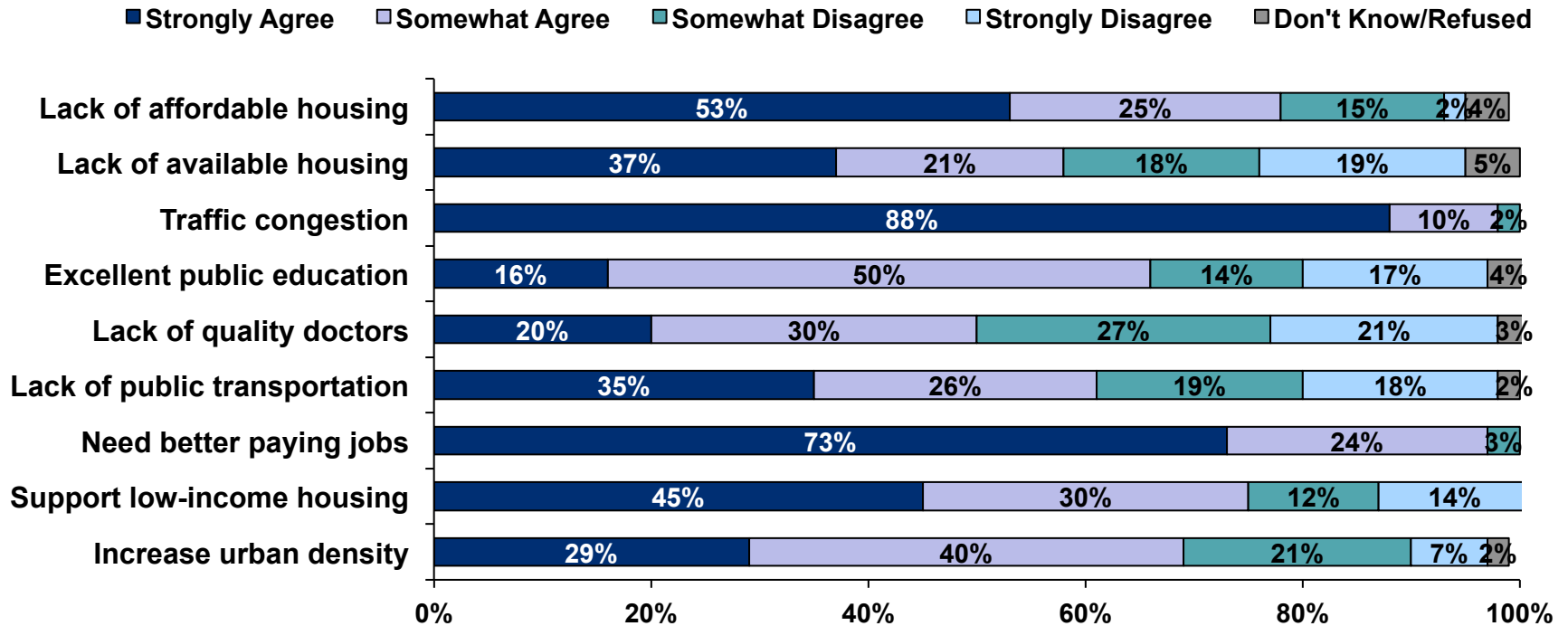
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Wahiawa/Mililani/Waipahu



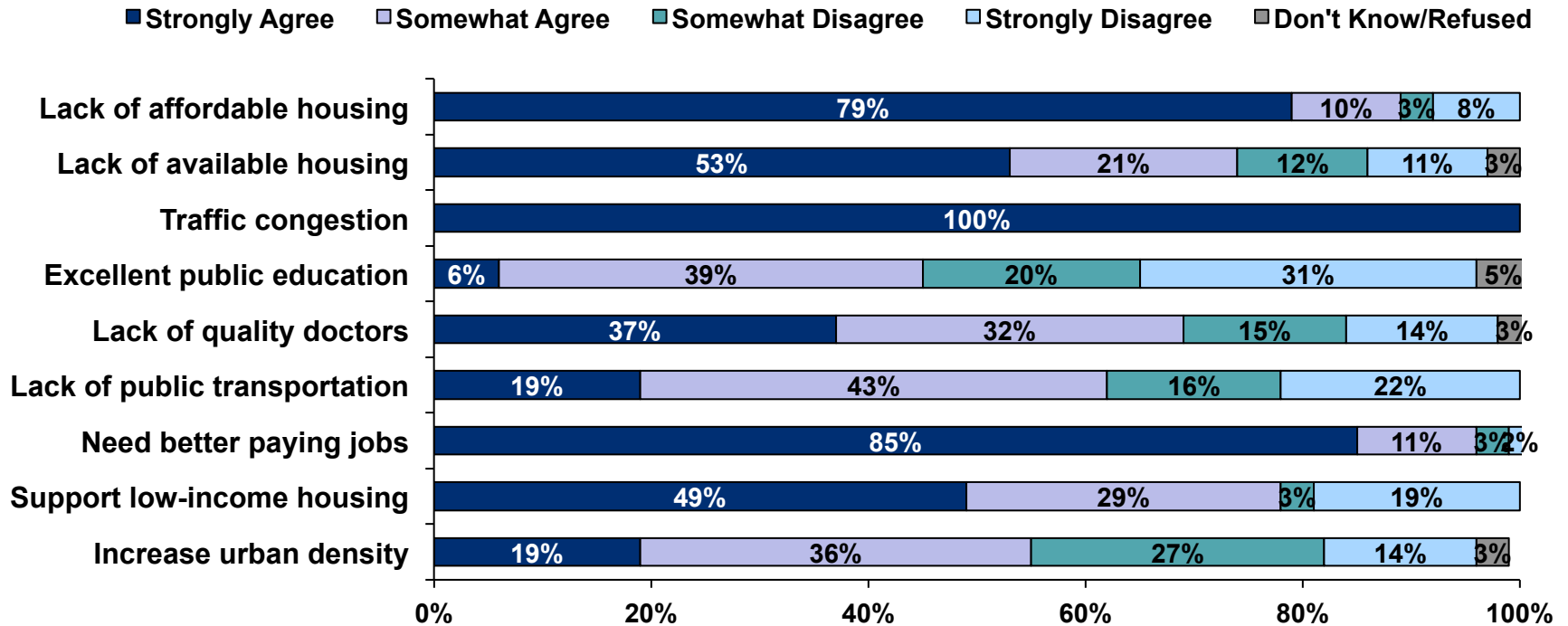
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Ewa/Kapolei/Makakilo



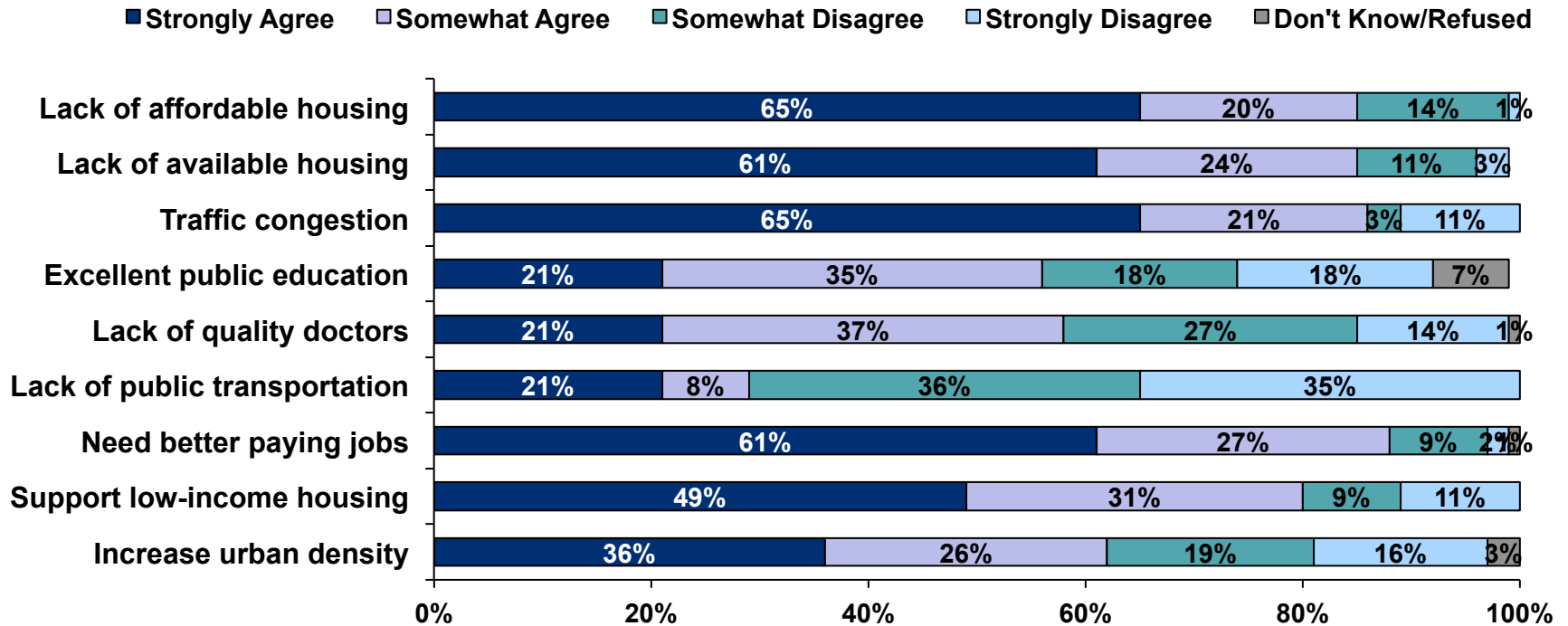
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Makaha/Waianae/Nanakuli



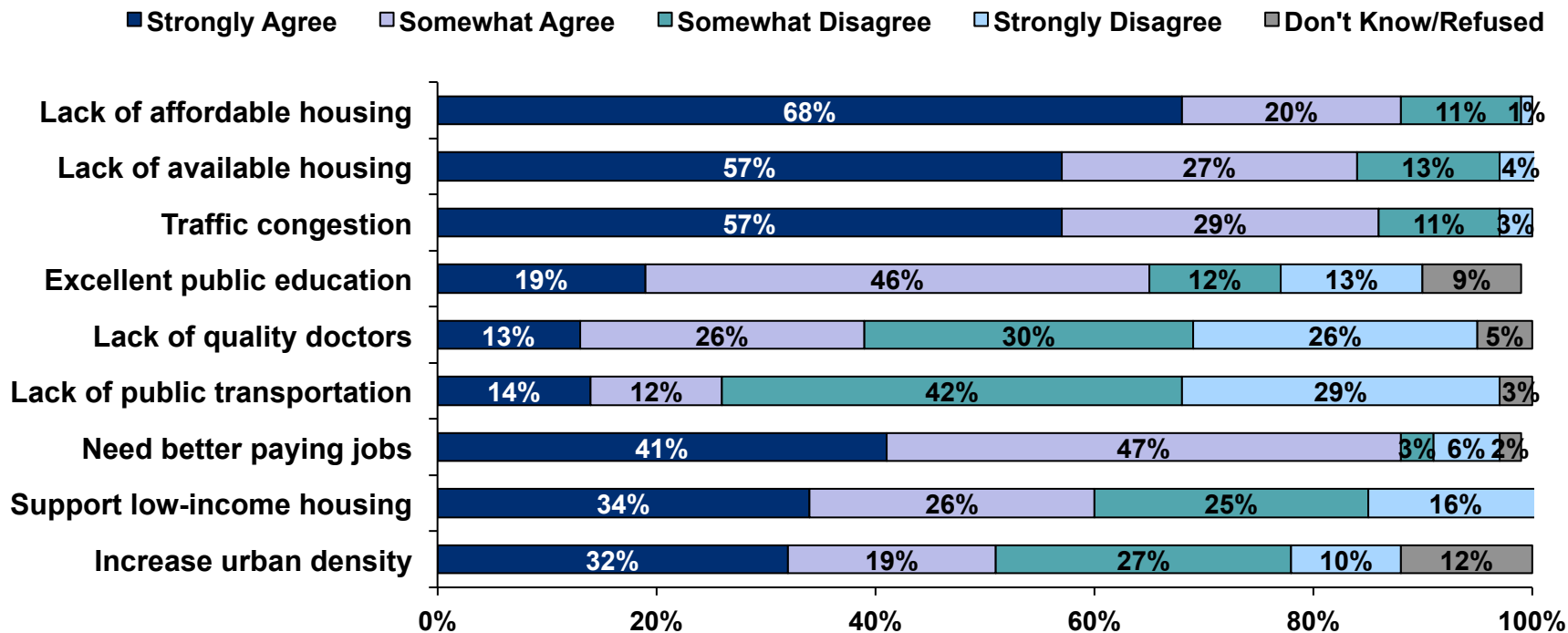
Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

North Shore/Laie



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Windward/Waimanalo



Q2: Now, I'll read you a list of statements. For each, think about your community or the area of the island where you live and please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.