

Hawai'i Perspectives

Fall 2019
Report

Understanding the Mindset
of Hawai'i Residents



An Initiative of
Pacific Resource
Partnership



PRP



Lucky we live Hawai'i?

Few would disagree that Hawai'i is one of the most desirable places in the world to live. Its natural beauty, temperate climate, multiculturalism and ethnic diversity together make the 50th state unlike any other. Add the aloha spirit and the emphasis on family, and why would anyone choose to live anywhere else?

Yet more and more, residents are weighing these benefits against the sacrifices they must make in order to live here – and in some cases – survive. In a place where increases in the cost of living have greatly outpaced the rise in incomes, the question of whether to stay or leave reaches across all

generations and is particularly burdensome to younger Hawai'i residents.

Amidst these economic concerns, one has to ask if aloha has limits. Hawai'i Perspectives Fall 2019 examines this trend and others with the hope that the voices of Hawai'i residents will impact the decisions made by its leaders. Despite the struggles, one thing is clear: the majority of residents love these islands — and they want to be able to stay.

We welcome your questions and feedback. Contact us at info@hawaiiperspectives.com.

Pacific Resource Partnership has been a contributing member of the community for more than 30 years, working on behalf of the 7,000 men and women employed as union carpenters and 240 large, medium and small contractors. With our focus on research, industry integrity and project advocacy, we are committed to building a stronger, more sustainable Hawai'i in a way that promotes a vibrant economy, creates jobs and enhances the quality of life for all residents.

Christine A.
Parent, Activist
Honolulu

An Initiative of
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Methodology

A statewide survey of 713 registered voters was conducted Oct. 4–14, 2019 via landlines and cellphones by professional interviewers; 55% of interviews were conducted via cellphone.

512 interviews were conducted in Honolulu County, 76 in Hawai'i County, 75 in Maui County, and 50 in Kaua'i County. The data was then weighted to reflect the composition of the Hawai'i electorate.

The margin of error for the statewide sample is +/- 3.7 percentage points at the 95% level of confidence. The margin of error for subgroups varies and is higher.

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Due to rounding, "totals" of the individual components may differ by +/-1.

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ALG Research

For over 20 years, ALG Research has helped a range of clients develop strategies and messages to shape policy debates and achieve their objectives.

ALG's nonprofit and issue clients include the Ford Foundation, Freedom for all Americans, AARP, EMILY's List, Rock the Vote, Third Way, the AFL-CIO and the Rockefeller Foundation. Partner Lisa Grove's experience in Hawai'i began in 1992 when she moderated focus groups for U.S. Senator Daniel Akaka in his first Senate bid. She has worked full time on the islands since 2010, and has queried thousands of Hawai'i voters on a wide range of topics, focusing mostly on public policy and politics.

Daubert Design Co.

Daubert Design Co. is a branding and creative design consultancy based in Honolulu. Founder and designer Warren Daubert is known for his ability to humanize brands by creating distinctive visual identities that tell a brand's story and communicate its purpose.

Daubert has worked with clients in multiple industries including renewable energy, environmental conservation and sustainability, IT, retail and fashion. He is the creative director and founder of Hau Tree Collective, publisher of *Ama*, and the former creative director of *Hawaii Business* magazine.

'Ohana is more than a word. It defines our culture.

To locals, 'ohana means far more than family.

It's the root of our culture, encompassing how we care for loved ones, our communities, and even strangers. It reflects the interconnectedness of our lives, how we are mutually dependent on one another and share a responsibility to care for our island home. As we look across the state it makes sense to ask: How is our collective family doing? Are we all moving forward together? ↪

The Strength of Our Communities

► **Across the board**, it's clear that residents want to live, raise their children and retire in Hawai'i. They want to live near family, and feel comfortable surrounded by greater ethnic diversity and others who share the same values of aloha and tolerance. The welcoming sense of community and the culture of 'ohana—whether one is related or not—is a key factor in what makes Hawai'i feel like home.

While people stay here because of 'ohana, for many in key demographic groups, affording life in the islands has become increasingly difficult, suggesting that Hawai'i is working better for groups that enjoy an element of financial comfort.



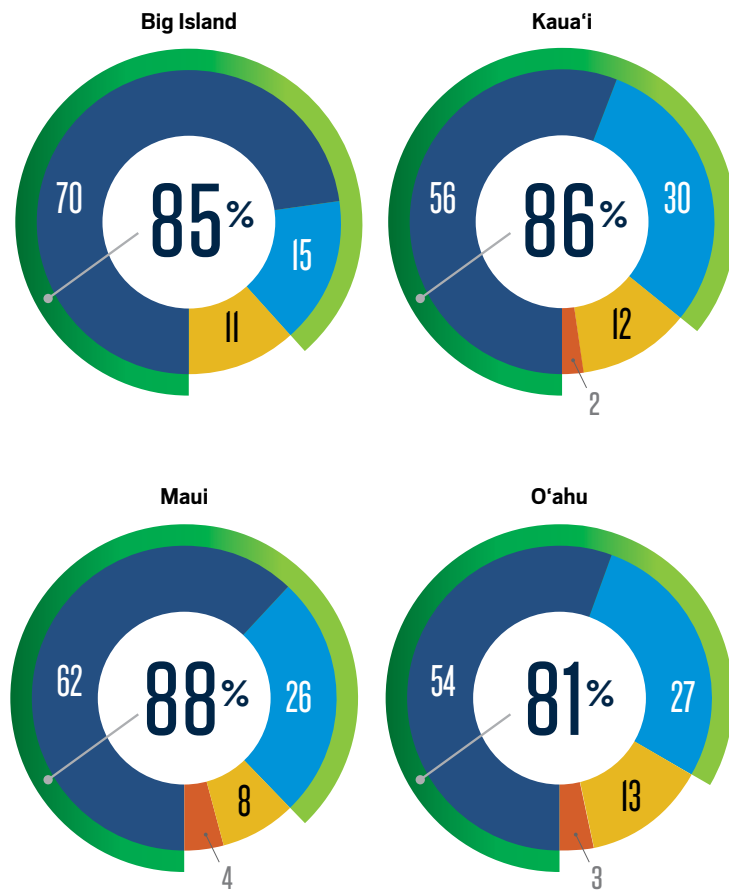
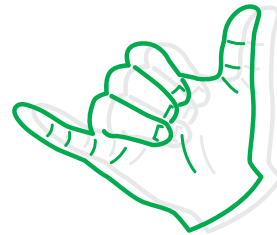
Hawai'i Nō Ka 'Oi

A majority of voters – particularly those who live on the neighbor islands – consider Hawai'i to be the best place to live, even if they have to make sacrifices.

QUESTION

Some people have a great attachment to Hawai'i, while others don't like it at all. Taking everything into account, how would you describe Hawai'i as a place to live?

- One of the best places to live
- Nice but not an outstanding place to live
- "Best" and "nice" combined
- About an average place to live
- Rather poor place to live



“ I love living in Hawai'i because of the sense of community. I feel like on this island everyone seems to know one another and that causes us to help each other out.”

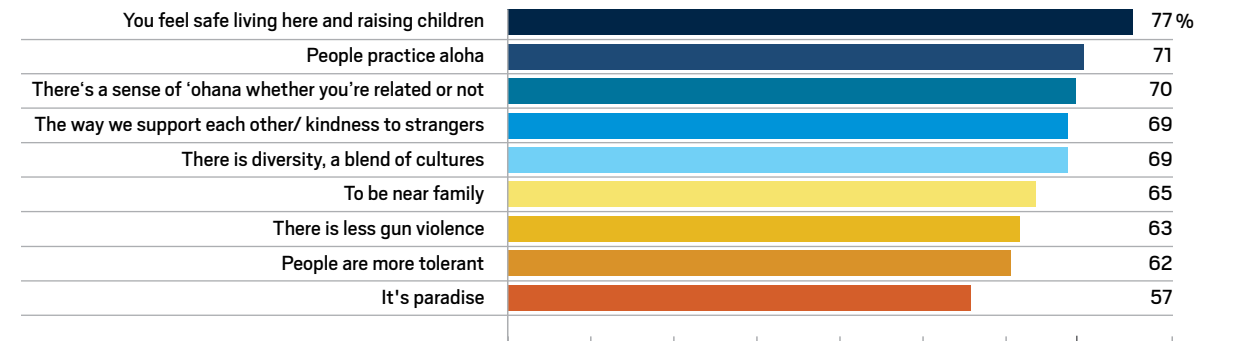
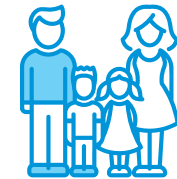
—Qualitative Research Participant, Female, 18–24 years of age, Honolulu

Home is Where the Heart Is

A safe environment, aloha spirit, and family are among the top reasons why people want to stay.

QUESTION

How important are the following to you?

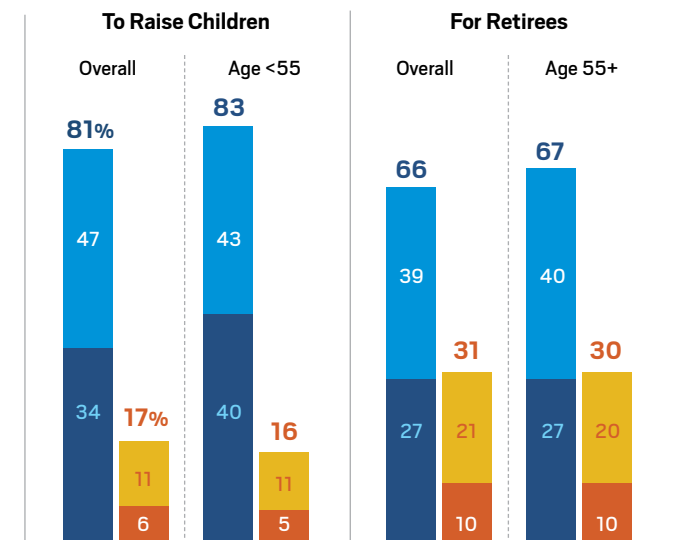


Good for Keiki and Kūpuna

A strong majority of voters believe Hawai'i is an excellent or good place to raise children and retire. But as residents age, they have more concerns about being able to retire here.

QUESTION

In each of the following situations, is Hawai'i an excellent place, a good place, a not so good place, or a poor place ...



- Excellent place
- A good place
- Not so good place
- Poor place



Is affordability in our future?

Everyone wants a better life. But in Hawai'i, where the cost of living is among the highest in the nation, what can residents look forward to? Through sacrifice, residents of all ages are hanging on... so far.

“We’re constantly trying to figure out ways to save money because we’re just making ends meet. It causes a lot of stress on our family and I’m always thinking about whether we can afford to stay in Hawai’i.”

—Christine A., Parent & Activist, Honolulu

Costs, Concerns & Sacrifices

► **Concerns about Hawai'i's future** are considerable, especially on O'ahu. Cost of living-related issues loom large and have increased the pessimism of long-time residents. On Kaua'i and the Big Island, residents are more hopeful overall; but even there, 18% of residents report being “much more worried.”

One of the more notable differences was in the level of hope between voters with and without a college degree. A majority of college-educated voters are “more hopeful” about their future in Hawai'i, while non-college graduates are more divided.

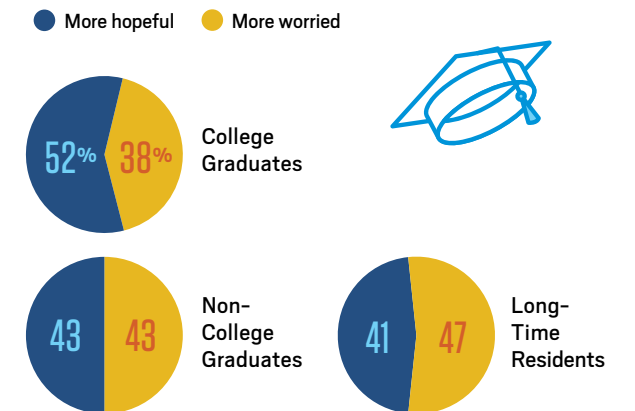


Who Worries Most About the Future?

A plurality of long-time residents are more worried about their futures here. College graduates are more hopeful.

QUESTION

Generally speaking, do you feel more hopeful or more worried about your future here in Hawai'i?



The Data »

College Graduate Data for Hawai'i – 5-year estimates for 2013-2017 as reported by American Community Survey conducted by the U.S. Census Bureau:

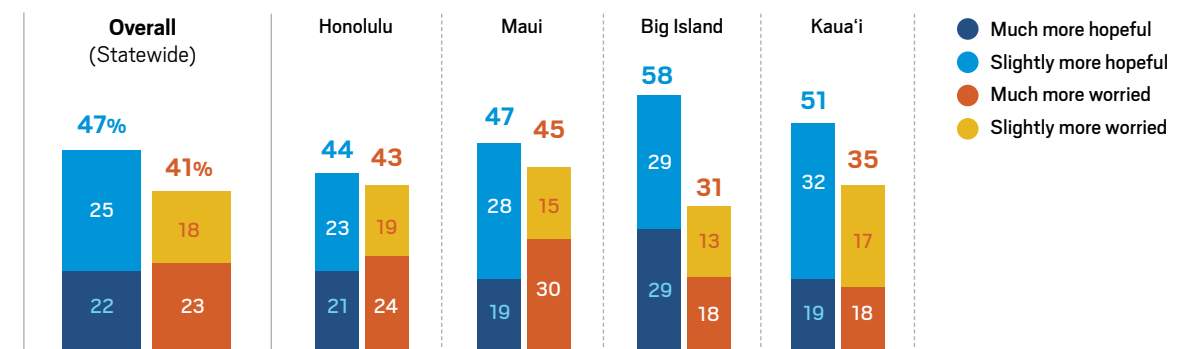
College graduate or graduate degree	25+	25-34	35-44	45-64	65+
	32.0%	31.1%	35.9%	32.7%	28.9%

Hope Narrowly Prevails

Voters on the Big Island and Kaua'i appear more hopeful than the rest of the state.

QUESTION

Generally speaking, do you feel more hopeful or more worried about your future here in Hawai'i?



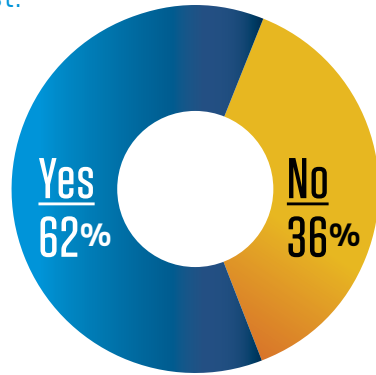
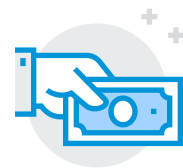
COSTS, CONCERNS & SACRIFICES

Paying for Paradise

For many, living in Hawai'i comes at a cost.

QUESTION

Do you feel you have to make personal sacrifices to live in Hawai'i?



Most likely to have made sacrifices to live in Hawai'i

Overall	62%
Those Considered Leaving	78
Parents	74
Renters	72
Age <55	71
Male, non-college graduates	69
Union household	67

3/10

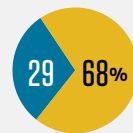
Surviving Together

Across Hawai'i, 3 out of 10 voters live in multi-generational households.

QUESTION

Do you live in a multi-generational household, either with parents or grandparents, or with adult children or grandchildren?

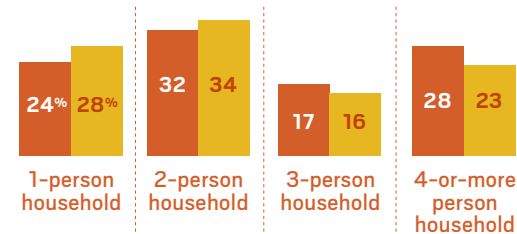
● Yes ● No



The Data »

Household Occupancy Breakdown

● Hawai'i vs. ● U.S.

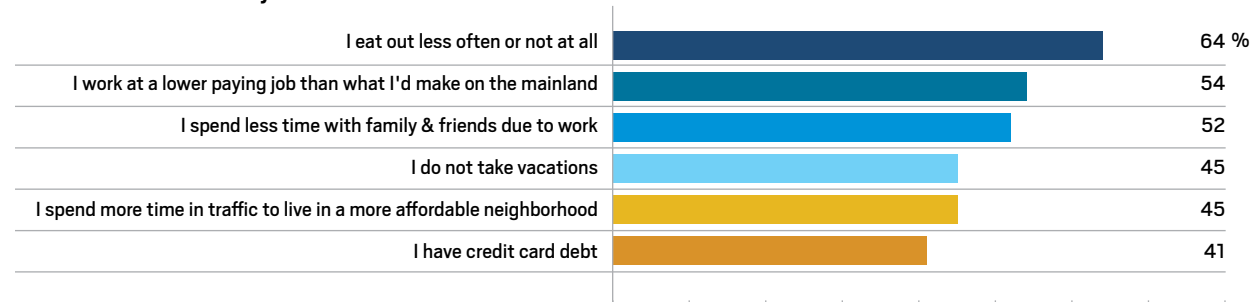


Source: U.S. Census Bureau American Fact Finder

What They're Giving Up

Among the 62% of voters making sacrifices, common sacrifices include eating out less, working for a lower salary, and spending less time with family and friends.

Sacrifices most commonly cited



RISKS TO HAWAI'I

An inflection point

The decision to leave Hawai'i for more fruitful opportunities has long been something local residents grapple with. Family ties and the quality of life in the islands keep many here. But as "sacrificing" and "making do" become part of the local vernacular, the prospect of moving for better is quickly becoming more enticing. ↪



The cost of living here in Hawai'i causes me stress, although I have a great job and income, I am still living paycheck to paycheck."

—Qualitative Research Participant, Female, 18–24 years of age, Honolulu

Risks to Hawai'i

► While young people are more optimistic about their future, that optimism isn't shared by older residents. The top reasons people consider leaving Hawai'i are the high cost of living and expensive housing, compounded by traffic congestion.

The Data »

Pay and job opportunities are frequently insufficient to sustain a comfortable life here. Hawai'i's economy relies heavily on service industry jobs, many of which barely provide a living wage. According to the U.S. Bureau of Labor Statistics, the state's median salary for all occupations is estimated at \$42,480, or a mere 10% higher than the national level. Unfortunately, that's hardly enough to offset Hawai'i's higher costs.

(May 2018 data, released in March 2019)

“When you're a student, there's this idea that you can't get any worthwhile career opportunities staying in Hawai'i. There's almost a sense of pride in choosing to leave. But usually after people spend time away, they start to understand why Hawai'i is such a special place. You shouldn't have to leave to see the merits of Hawai'i.”

—Noah W., College student, Part-time barista, Honolulu

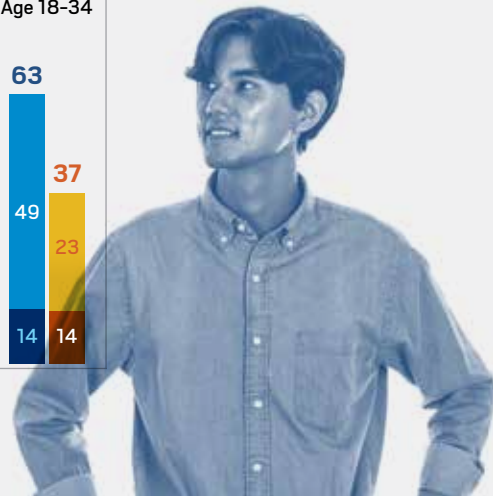
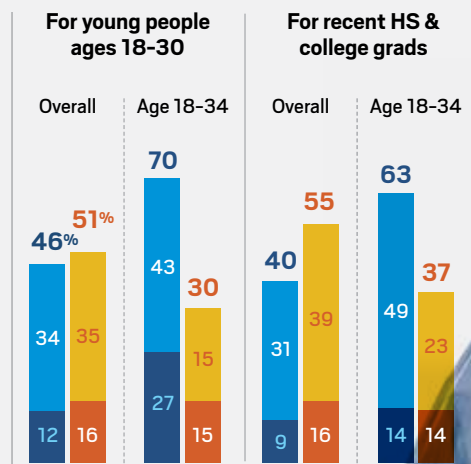
Millennials See a Bright Side

Is Hawai'i a good place for young people? Millennials are the most optimistic.

QUESTION

In each of the following situations, please tell me whether you think Hawai'i is an excellent place, a good place, a not so good place, or a poor place.

- Excellent place
- A good place
- Not so good place
- Poor place



Homeless Concerns

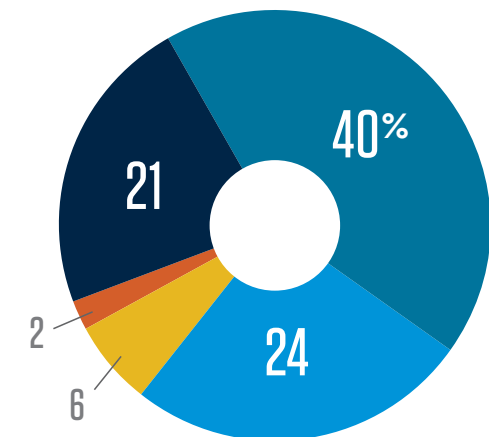
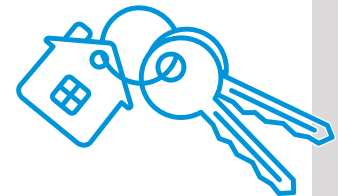
Spring 2019 and Fall 2019 poll respondents cited the growing ranks of homeless people as a reason they're considering leaving the state. The issue was characterized as "very serious" to "somewhat serious" by 75% of Fall 2019 respondents. Statistically, Hawai'i's homeless population accounts for less than 1% of the state's total population, but the perception of the situation as worsening and impacting the quality of our lives consistently weighs heavily on the minds of residents.

“Affordable” — For Whom?

61% of voters define “affordable housing” for a 2-bedroom apartment as \$1,500 a month. By contrast, the National Low Income Housing Coalition estimates fair market rent for a 2-bedroom unit in Hawai'i is \$1,914. On a county basis, NLIHC rent estimates are \$2,067 (O'ahu), \$1,346 (Big Island), \$1,531 (Kaua'i), and \$1,675 (Maui).

QUESTION

What do you consider to be “affordable housing” for rent or mortgage for a two bedroom, two bathroom apartment?



- Less than \$1K
- \$1,001 - \$1,500
- \$1,501 - \$2,000
- \$2,001 - \$2,500
- \$2,500+

Fight or Flight

The top two issues driving residents away are Hawai'i's high cost of living and expensive housing. Other triggers include worsening traffic, climate change and lack of job opportunities.



Reasons people consider leaving Hawai'i

The high cost of living	86 %
Housing is too expensive	83
Our problems are only getting worse	69
Traffic	68
Our problems never get solved	65
Climate change, environmental factors	63
Lack of job opportunities	60

RISKS TO HAWAI'I

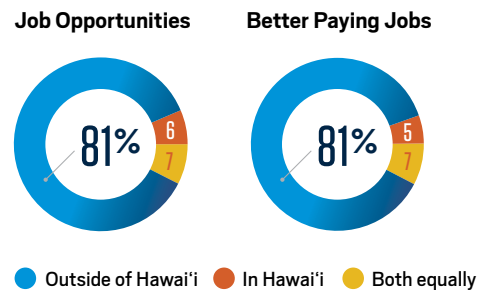
Perception Is Reality?

Most residents think there are more job opportunities and better paying jobs outside of Hawai'i.

QUESTIONS

Do you think there are more job opportunities in Hawai'i, or more job opportunities outside of Hawai'i?

Do you think there are better paying jobs in Hawai'i, or better paying jobs outside of Hawai'i?

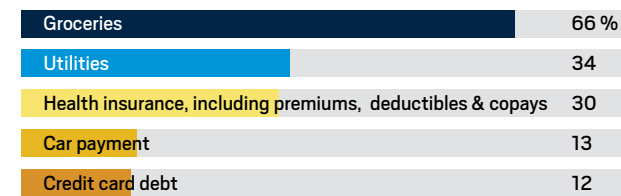


What's Eating Our Paychecks?

After rent or mortgage, groceries account for the bulk of our monthly budgets.

QUESTION

Which living expenses – aside from housing – do you spend the most on? (Two responses accepted)



LONG-TERM OUTLOOK

Kuleana means taking care of our community.

In Hawai'i, kuleana, our sense of responsibility, doesn't fall on just one person. It's embraced by friends, families, and communities — it's what unites us. If what we've done in the past isn't working, how can we come together to make Hawai'i a better place for future generations? ↪

The Data »



Median Pay Differentials, Hawai'i vs. U.S.

Although Hawai'i salaries are higher, things cost more here. Regional Price Parity calculations by the Bureau of Economic Analysis show Hawai'i prices are the nation's highest, 18.5% above the national level.

	Hawai'i		U.S.		Hawai'i Premium
	Employment	Salary	Employment	Salary	
Combined Food Preparation & Serving Workers, Including Fast Food	14,250	\$23,520	3,676,180	\$21,250	11%
Cooks, Restaurant	10,660	\$30,830	1,340,810	\$26,530	16%
Elementary School Teachers, Except Special Education	6,040	\$61,180	1,410,970	\$58,230	5%
Food Preparation Workers	7,700	\$25,840	814,600	\$23,730	9%
Physical Therapists	1,010	\$89,500	228,600	\$87,930	2%
Urban and Regional Planners	470	\$74,310	37,840	\$73,050	2%

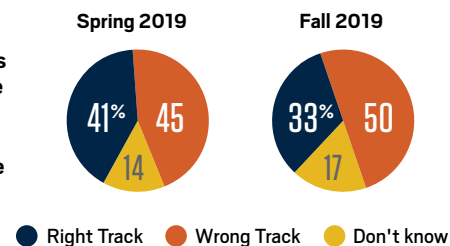
From the U.S. Bureau of Labor Statistics. They reflect May 2018 numbers and were released on March 29, 2019.

Pessimism is Increasing

A majority of Hawai'i voters are pessimistic about the direction in which the state is moving, an attitude that has become more persistent.

QUESTION

Would you say that things in Hawai'i are going in the right direction, or would you say that things are pretty seriously off on the wrong track?



It is easy to complain, but difficult to effectuate change. At a minimum, everyone who can should vote. If you don't like the way things are going, call your representative or submit/present testimony during public hearings. If there are enough people making the effort, our collective voices will be heard.”

—Qualitative Research Participant, Male, 30–34 years of age, Honolulu

Improving The Long-Term Outlook

► **Voters are clear about** their priorities for Hawai'i. They want to make the state a better place for future generations and support policies that do the same, especially those involving affordable housing, public school investment and creating sufficient elder care.

Voters want elected officials who embrace these responsibilities and are committed to tackling tough issues. In other words, there is hope—considerable hope—that our leaders will innovate to move Hawai'i forward.



Supporting Existing Industries

Voters feel that Hawai'i's major industries including tourism, the military and renewable energy are good for the state.

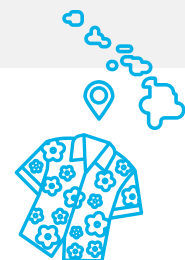
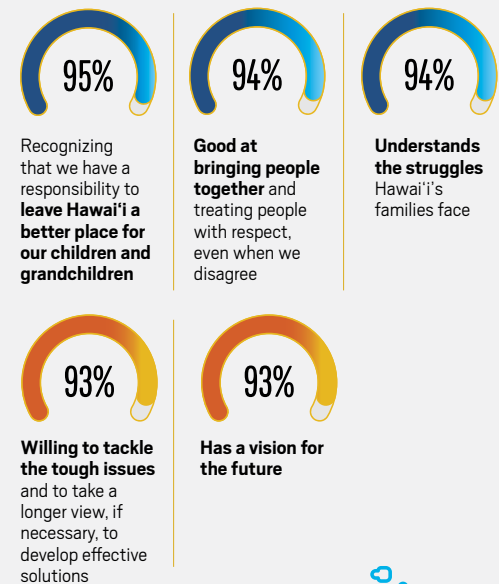
Levels of support for existing industries

Tourism	85 %
The U.S. military	85
Renewable energy, including wind & solar	81
Construction & development	73
The astronomy industry	68
High-tech & information technology	66

The Ideal Elected Official

Voters want elected officials who understand and empathize with the plight of local residents.

The following values and principles are important in our political leaders.



Hawai'i has some of the lowest voter registration levels in the nation. Why do you think that is?

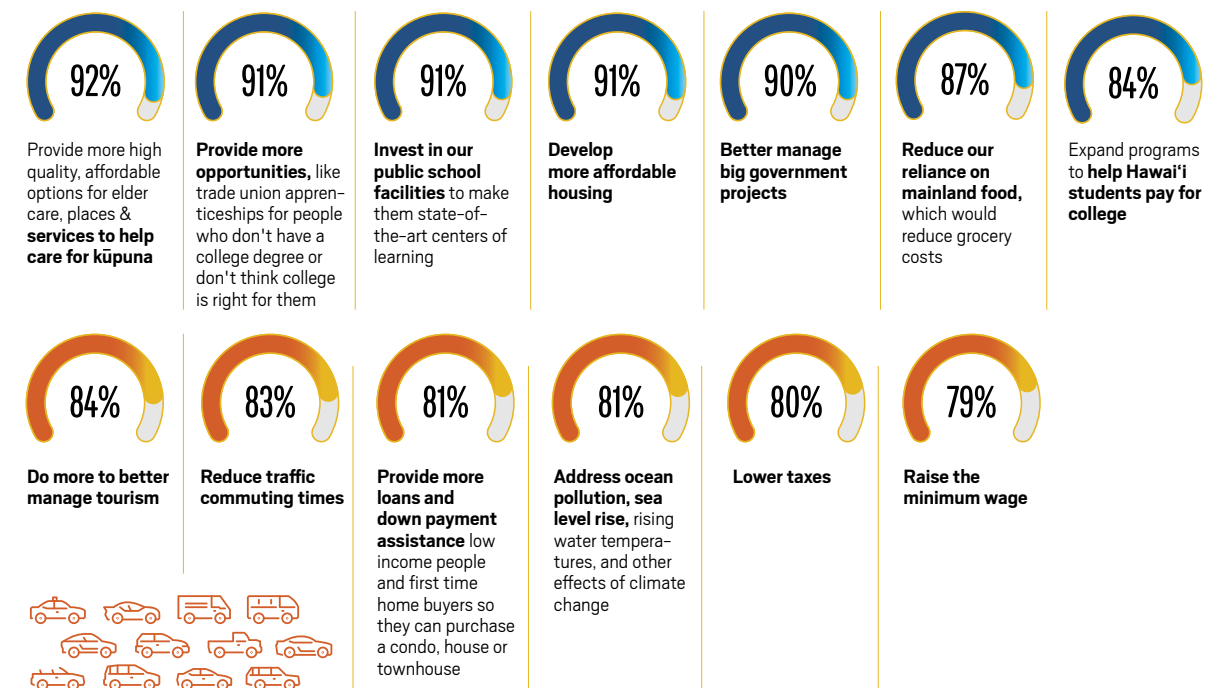
“To be honest, because many people believe voting doesn't matter. They don't think their vote counts or that they figure politicians are all the same so why bother. Yet ironically, these are the same people who grumble and complain about the politicians in office who aren't doing any good for the people.”

—Qualitative Research Participant, Female, 45–49 years of age, Honolulu

Voters' Highest Priorities

Across all age groups, voters agree on similar approaches to improve our quality of life.

How important are these solutions?



INSIGHT Most important proposals to improve quality of life

Under Age 55
 Affordable Housing
 Invest in public schools
 Better manage big government projects
 Elder care

Over Age 55
 Elder care
 Better manage big government projects
 Invest in public schools
 Affordable Housing

Our communities sustain us

Hawai'i is special, and voters have made it clear they are willing to make sacrifices to live here. Even so, as life gets harder, too many of our residents feel their options here are limited. Can we draw upon the strength of our 'ohana and communities to help find solutions? Voters seem to say "yes," but the clock is ticking.

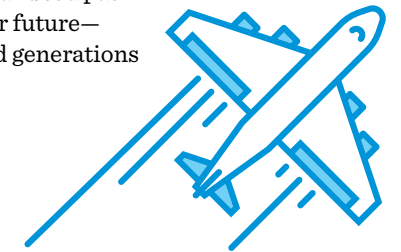
Embracing Hawai'i's Challenges as 'Ohana

► Residents are torn about leaving.

While 47%—compared to 45% in the Spring—said they or someone in their household has thought seriously about leaving or has left the state, 51% said they have not considered moving away. Men under age 55 are more likely to

think about leaving than other demographic subgroups. Meanwhile, over half the parents surveyed have considered relocating in search of a better life for their families.

Hawai'i is unlike anywhere else in the world. How do we keep our family and friends here? Together, we can set a path toward a better future—for kupūna and generations to come.

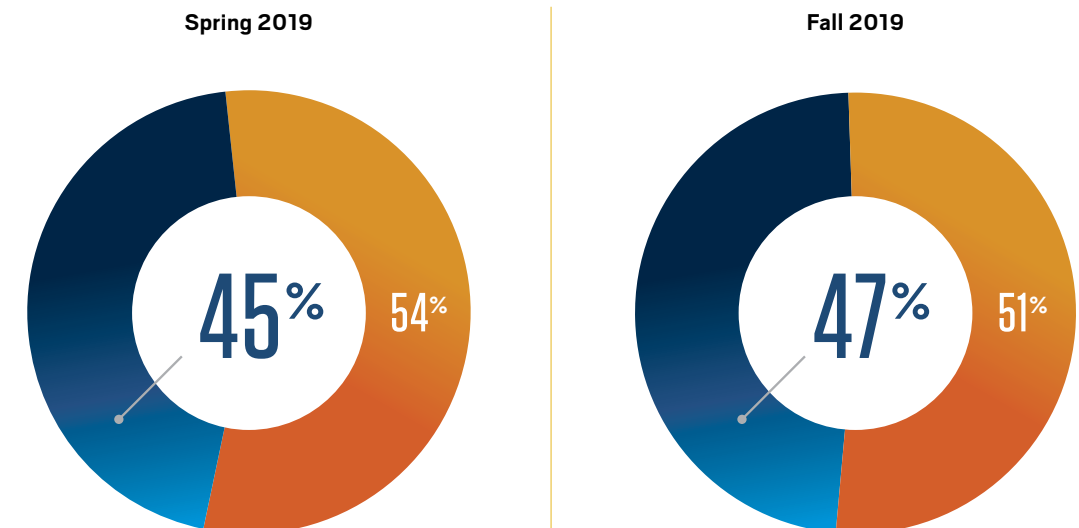


Thoughts of Leaving Still Linger

Almost half of Hawai'i households have considered moving away from Hawai'i.

QUESTION Have you or has anyone in your household ever thought seriously about leaving the state or have recently left Hawai'i

● Yes
● No



Moving forward together

Hawai'i Perspectives has identified the major issues that weigh heavily on the minds — and wallets — of our residents. We now find ourselves at a critical juncture. Polling results affirm that working together as communities we can address our challenges and find meaningful, creative and innovative solutions that will move Hawai'i forward and enable our residents to not only survive, but thrive. The opportunity, however, is collectively ours as every resident deserves to say, Lucky We Live Hawai'i.



Noah W.,
College student,
Part-time barista,
Honolulu

Working for the people of Hawai‘i

Pacific Resource Partnership is committed to a vibrant and sustainable economy, good paying middle-class jobs, housing, 21st century schools, apprenticeship programs and policies that enhance the quality of life for all of Hawai‘i’s residents.

PRP Initiatives

Industry Integrity

Non-compliance with Hawai‘i’s labor, employment and construction industry laws affects legitimate businesses in all industries, every taxpayer and the entire state economy. In partnership with government officials, businesses, workers and the public, PRP is committed to raising awareness of these fraudulent activities and ensuring unscrupulous operators do not take advantage of workers and those living in the community.

Executive Leadership Series

The Executive Leadership Series is an intensive, 10-month leadership development program, custom-tailored for Hawai‘i’s next generation of construction leaders. Led by some of Hawai‘i’s top design and construction industry consultants and practitioners, the program covers a broad range of topics required for success in the construction industry, from personal development to business essentials.

Research

Data informs us. The construction industry plays a vital role in both sustaining and stimulating Hawai‘i’s economy. PRP tracks new projects, building permits, and public works activity, using data to analyze the industry’s direction and impact. Research products also include Hawai‘i Perspectives and data-driven work on specific projects and areas of activity meant to better our understanding of the state of the industry, both locally and statewide, as well as Hawai‘i’s economy.

Hawaii Directory of Public Officials

A public service provided by PRP, the Hawaii Directory of Public Officials is a guide to elected and appointed federal, state, and county government representatives. This directory has been an invaluable tool for civic engagement for over 20 years. PRP assumed responsibility for this publication from the Hawaii Institute for Public Affairs in 2018.

Insights

PRP’s quarterly publication that seeks to build understanding, support and effective action on key topics and issues affecting Hawai‘i. Each issue features the views of industry experts and shares the perspectives of people working in our community.

KĀKOU

KĀKOU is a civic engagement app developed exclusively for Hawai‘i. It enables users to contact elected officials, register to vote, weigh in on hot-button issues, and advocate alongside local nonprofit organizations. The app allows access to the Hawaii Directory of Public Officials and provides a tool for creating support for legislation and community efforts.

To learn more about KĀKOU, visit: www.kakouapp.org



To learn more about any of PRP’s initiatives or programs, visit prp-hawaii.com or call (808) 528-5557.

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