Hawai'i Perspectives

Winter 2025 Report

Understanding the Mindset of Hawai'i Residents









Making Hard Calls for Hawai'i's Future

The critical decisions we make now will define the state's course for years to come.

Every choice carries weight—not just for today, but for generations. Hawai'i's 1.4 million residents stand at a crossroads, where chronic, overlapping issues and the policies that address them will determine the islands' future.

The Winter 2025 edition of Hawai'i
Perspectives is a scientifically conducted
survey that gives voice to more than 900
residents across O'ahu, Hawai'i Island, Maui
County, and Kaua'i, capturing the anxieties
and aspirations that reflect this moment.

"Hard Calls" is more than a theme—it is our daily reality. After years of inaction and modest efforts, we now face decisions that we can't postpone.

How deep is the hole we're in? We're still digging.

Roughly 64,000 affordable homes are needed today in Hawai'i. The question is no longer if we should build, but how quickly we can act. At stake is nothing less than Hawaiʻi's identity, our host culture. The 2020 U.S. Census reported that only 47% of Native Hawaiians lived in Hawaiʻi, while 53% resided on the continent. Also sobering, the Native Hawaiian population living outside of these islands is growing five times faster than those who remain.

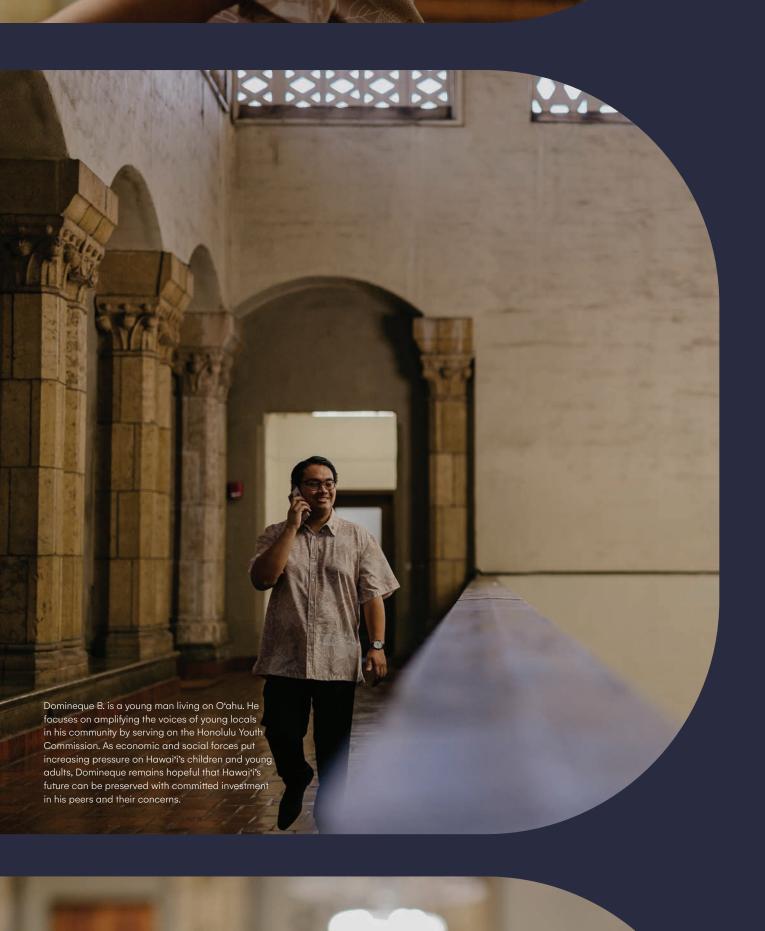
Hawai'i's high cost of living—driven by housing, food, energy, and transportation—leads the nation. Families renting homes, buying groceries, and filling gas tanks know this reality all too well.

At this critical juncture, Hawai'i
Perspectives offers a snapshot of a
community wrestling with urgent challenges,
potential solutions, and the ultimate, lifedefining "hard call" of whether to stay or go.

Mahalo for engaging in this critical conversation. The future of Hawai'i is at stake and every voice—every decision—matters.

Pacific Resource Partnership (PRP) has been a contributing member of the community for nearly 40 years, working on behalf of the 6,000 men and women employed as union carpenters and 250 large and small contractors throughout the state. With our capabilities in research, industry relations, and project and civic 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.





Methodology

This survey of Hawai'i residents was conducted to track attitudes on a variety of issues that affect our island communities. It was conducted among a random sample of Hawai'i residents using a mixed-mode approach that included telephone and online fielding. Research respondents were screened to ensure they were 18 years of age or older and fulltime residents of the state of Hawai'i.

The sample for this mixed-mode survey was compiled from multiple sources: third party online sample providers, publicly available contact lists of Hawai'i residents including voter contact lists, and random digit dialing, augmented by Anthology Research's proprietary panel of Hawai'i residents who have opted to participate in research.

A total of 907 surveys were collected from July 1 to August 10, 2025. The margin of error for a sample of this size is $\pm 1/-3.25$ percentage points with a 95% confidence level. Statewide totals were weighted to represent the estimated proportions of adults by ethnicity in each county.

To deepen our understanding of the survey results, two focus groups were convened with registered voters representing both Oʻahu and the Neighbor Islands. Direct, anonymized quotes from these conversations are woven into the report to highlight resident sentiment.

CONTENTS

Making Hard Calls For Hawaiʻi's Future	2
Methodology	5
Pessimism Still Clouds Outlook	6
The Worsening Housing Crisis	10
The Housing Availability Gap	12
Infrastructure is Essential for Housing	14
Charting a Course for Rail's Future	16
U.S. Military in Hawaiʻi	18
Hawaiʻi's Hardest Decisions Can't Wait	20
Moving Forward	22

Anthology Research

Anthology Research is a Honolulu-based full-service market research firm founded in 1995 that provides rigorous quantitative and qualitative research services to clients throughout the Pacific Region.

Leveraging its experienced team of telephone interviewers and the latest in online polling technology, Anthology has conducted polling programs for numerous federal, state and county political races, as well as sought public opinion on some of the most important issues facing the Islands.

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. Frequent collaborator James Nakamura specializes in crafting visual narratives through a variety of mediums. Both have worked with clients in multiple industries including renewable energy, environmental conservation and sustainability, IT, retail, publishing, and fashion. Daubert is the former creative director of Hawaii Business Magazine. Nakamura is currently the Creative Director for HONOLULU Magazine.



Pessimism Still Clouds Outlook

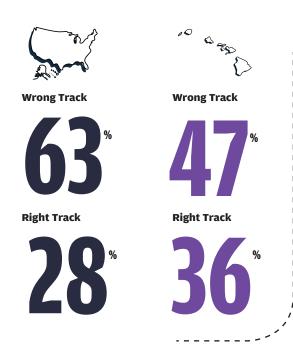
Hawai'i is Still Moving in the Wrong Direction

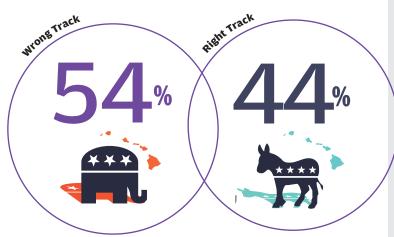
Where do we stand as a state and as a nation? It's a horse race, but pessimism prevails. For 47% of survey respondents Hawai'i is on the wrong track (down from 53% last year). Only 36% say we're on the right track (up from 28%). The remaining 17% are unsure which track we're on.



Even less optimism about the country

Looking beyond Hawai'i, respondents are even less optimistic about the nation. Statewide, 63% of residents believe the U.S. is on the wrong track. On the flip side, those who believe we're headed in the right direction grew slightly - 28%, up from 21% last year.



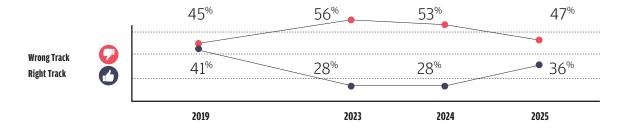


Dividing lines

Democrats (44% right direction) are the most optimistic about the direction of Hawai'i, while Republicans lean pessimistic (54% wrong direction). By gender, more women think the state is on the wrong track, 50% vs. 43% of men. Registered voters are significantly more optimistic about Hawai'i than non-voters, with 38% saying the state is headed in the right direction versus just 21% of non-voters.

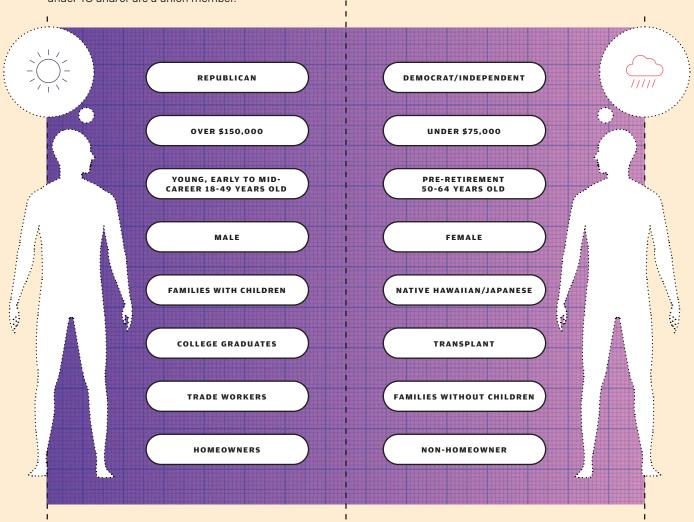
A break in the storm? Long-term optimism ticks up

If there's a bright side in ranking our state, optimism about Hawai'i's future has grown since last year, with fewer residents saying we're headed on the wrong track. While less than half of residents born and raised in Hawai'i (44%) believe we're headed in the wrong direction, transplants have a dimmer outlook, with 51% saying we're on the wrong track.



Who's thriving?

Statistically, Hawaii residents who report being better off financially than they were a year ago tend to be male, college educated, employed full-time, own their homes, lean conservative, and likely live with a child under 18 and/or are a union member.



Politics of financial well-being

Financial well-being is clearly divided along political, demographic, and socioeconomic lines. Republicans report doing better financially than both Democrats and Independents, while men rate their financial situation higher than women.

Age and education are factors

Residents between 50 and 64 rate their financial situation over the last year the lowest of any group. Education also makes a difference, with college graduates faring better financially than those without a degree.

The more you make, the better you feel

Income is a decisive factor; households earning under \$75,000 are less likely to say they're better off than a year ago, with only 14% reporting improvement, compared to 36% of households earning over \$150,000.

Little change in economic outlook

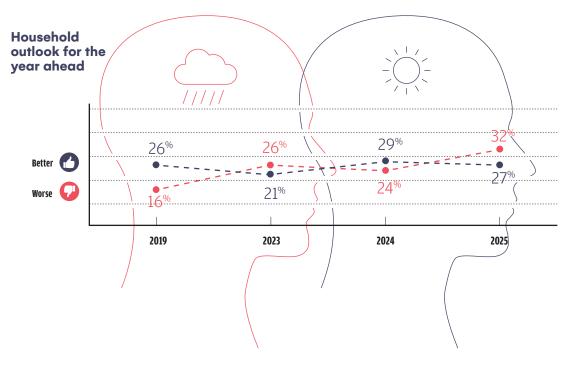
Most of us are forced to make tough choices on how to spend money, and statistically, most respondents say they aren't better off than a year ago. Statewide, just 6% felt they're doing much better as a household compared to 4% a year ago.

Financial optimism on the decline

While no one can predict tomorrow with any certainty, optimism for a brighter financial future has faded compared to last year. Just over a quarter of respondents are optimistic about their financial future, while 37% expect no noticeable change. About a third predict they'll be worse off.

"If you're local here, just trying to make ends meet, you're basically working four jobs or you're forced to live with someone. That's how you make ends meet."

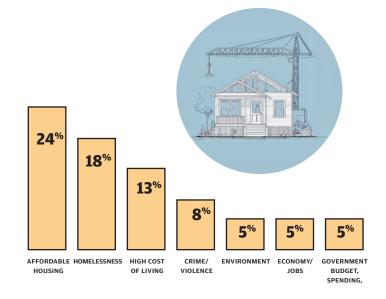
— Focus group participant





Housing still the primary worry

Some things never change. For years, Hawai'i residents have grappled with the lack of affordable housing, homelessness, and the crushing cost of living. These are chronic issues that continue to erode opportunity, push families to the brink, and force many to leave the islands. Residents are clear: the time for conversation is over. It's time for policymakers to make hard calls of their own and deliver impactful solutions to create more housing. Until then, housing and other lingering problems will continue to exact a heavy toll on our residents.



Hurting from soaring living costs

The percentage of residents who want government to focus on the high cost of living fell to 13% from 19% in 2024. Regardless, the steep cost of groceries, utilities, even school supplies continue to strain household budgets, leaving many working families one paycheck away from crisis.

Housing needed now, not later

Many are frustrated by delays due to government red tape, lengthy permitting, and environmental or cultural reviews. Sentiment is strong for setting statutory limits on review timelines, and a notable number support using government condemnation powers to enable affordable housing, infrastructure, and transit-oriented communities.

Many believe lawmakers over-emphasize environmental protection at the expense of housing needs. While this sentiment varies by age, income, and political affiliation, the overall trend points to growing frustration with slow processes and a strong desire for action to expand housing supply.

Concerns, potential solutions

	AGREE	DISAGREE
Govt. red tape is a barrier to more housing in Hawai'i	75%	11%
Limit time allowed for permit- ting, environmental or cultural review for new housing	75%	10%
Hawaii needs to build more housing as quickly as possible	71%	24%
Govt. should use its power of condemnation to enable development of affordable housing, infrastructure, or transit-oriented communities	6 %	24%
Lawmakers have placed too much emphasis on protecting the environment and not enough on building homes for residents	51%	37%

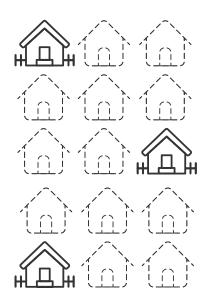
Broad support for development policies

When respondents were asked to consider six options to tackle the housing crisis, their preferences showed a willingness to make difficult choices to improve housing affordability and availability. There was overwhelming support for establishing a rent-to-own program and transit-oriented development that places homes and jobs near rail lines. Respondents supported a workforce housing fund financed by a nominal tax on commercial and resort properties, suspending slow permitting laws, and increasing height limits in certain areas.

Converting agricultural land for housing was the least desirable option with a majority of respondents opposed to the idea.



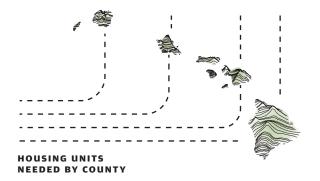
Start a rent-to-own program that let's people rent a home with the option to buy it later. A portion of rent may go	AGREE %	DISAGREE 7 %
Build more homes, shops, and jobs near bus or rail stations so people can live and work close to public transportation.	79%	13%
Create a Workforce Housing Fund, funded by a 0.022% property tax on commercial industrial, hotel/resort and short-term rentals to help build housing for middle income residents.	66%	20%
Temporarily suspend laws that slow permitting and approval of housing projects.	50%	28%
Increase the height limit for new residential buildings in select areas as a way to increase housimg supply and reduce costs for buyers	55%	33%
Convert agricultural land to urban use to build more housing in areas where it is needed most.	38%	52%



The housing availability gap

There's a quantifiable gap between the amount of housing available in Hawai'i versus what is needed. County-by-county needs may differ, but the statewide reality is stark: Hawai'i is short about 64,000 homes. To close the gap, we must consider a wide range of solutions that put affordable projects first. Protecting existing affordable rentals is equally vital.

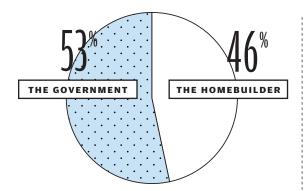
TOTAL	4,914	25,710	14,987	18,879
OWNERSHIP	2,156	10,287	7,423	1,0121
RENTAL	2,758	15,422	7,563	8,758





Infrastructure is essential for housing

Without more infrastructure, we can't build more homes. Roads, water lines, sewers, and power are the backbone that make housing possible. When modern infrastructure is lacking, housing costs rise and affordability grows further out of reach. Determining who foots the bill for infrastructure – government or homebuilders – gets us closer to solving the housing crisis.



Who picks up the tab?

When it comes to housing, the old adage "There's no such thing as a free lunch" rings true. If homebuilders are forced to pay for infrastructure, that cost is passed on to individual homebuyers, often adding hundreds of thousands of dollars to the price of a home.

Residents are split on who should bear the burden for infrastructure – government (53%) or homebuilders (46%).

Neighbor Island residents are statistically more likely to assign the costs to the government, while on O'ahu there is greater preference for the homebuilder to pick up the tab.

Those who are most concerned about affordable housing strongly prefer that the government cover the costs (60%). However, as education and income rise, support shifts toward having homebuilders pay for infrastructure. For example. half of college graduates favor homebuilders absorbing these costs, compared to only 40% of those without a degree."

Are you in favor of changing the state constitution to allow for a new type of infrastructure financing through bonds?



"I think we have to diversify how we pay for things on this island. We have to look at all the resources that are available to really make this work."

— Focus group participant Nicole W. of Salt Lake on creative financing that allows government to pay for infrastructure up front



Invisible costs overhead and beneath your feet keep prices high

The median price of a home is \$1,045,000, with infrastructure making up 30% of the total cost. This is equivalent to a down payment. This example is of a housing project in Kona where a home costs \$1.2 million.

ABOVE GROUND (electricity, street lights)

\$2,975,119.61 TOTAL

\$44,640 PER UNIT



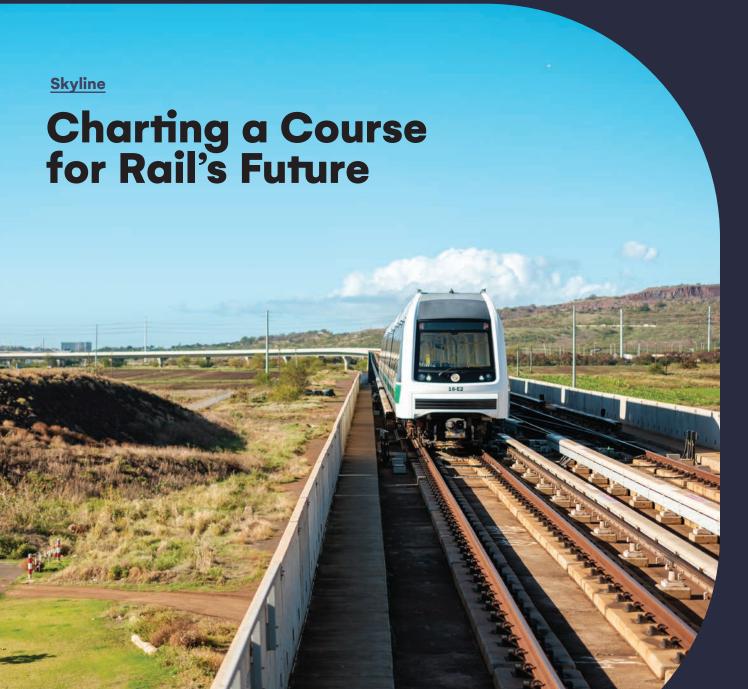
AT GRADE (ROADS, PATHS)
\$7,258,422 TOTAL

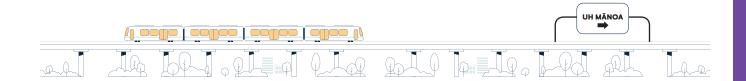
BELOW GROUND (SEWER, WATER)

\$2,589,105 TOTAL

\$51,295 PER UNIT

\$12,822,647.48 TOTAL INFRASTRUCTURE COST FOR PROJECT





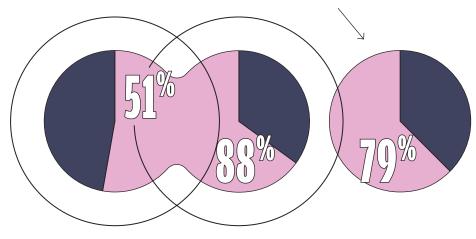
Support for Skyline holds steady

It's been nearly 20 years since O'ahu residents narrowly voted to move forward with rail transit - a decision that continues to shape debate over the island's future. Overall support on O'ahu is holding steady at 51%. Those on the Neighbor Islands have a somewhat more favorable view of Skyline with 59% supporting the rail transit program. \longrightarrow

Redirect rail funding, raise property taxes?

If the current 0.5% G.E.T. surcharge on O'ahu was redirected to other government needs, would respondents support an increase in real property taxes to continue funding rail construction?

Their answer: a big, fat No. On O'ahu, nearly 8 in 10 residents (79%) oppose redirecting the funds, signaling clear resistance to any move that might force the City and County of Honolulu to raise property taxes to keep rail construction on track.



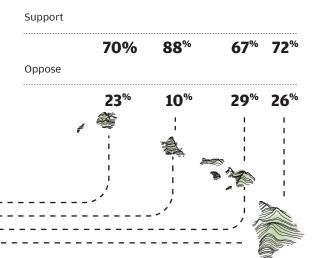
SUPPORTIVE OF SKYLINE ON O'AHU

SUPPORT 0.5% G.E.T. SURCHARGE OVER PROPERTY TAXES ON O'AHU

OPPOSE REDIRECT-ING 0.5% G.E.T. **FUNDS TO OTHER NEEDS ON O'AHU**

Keep G.E.T. funding source

Residents are grappling with how to continue funding Skyline construction. When asked to choose between retaining the half-percent G.E.T. surcharge on O'ahu instead of raising property taxes, a majority of residents statewide favor keeping the O'ahu surcharge (82%). Support was even stronger on O'ahu at 88%. On the Neighbor Islands, support was solid but lower, at 70%. Among homeowners, the preference for maintaining the surcharge was even clearer, with 85% favoring it.

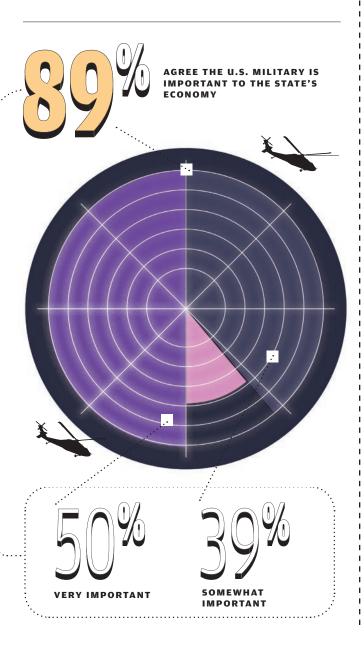




U.S. Marine Pfc. Aliyana Hamilton, a combat engineer with the 3d Marine Littoral Regiment, shares a smile during the Turkey Trot at Mokapu Elementary School on Marine Corps Base Hawai'i, Nov. 27, 2024 Photo: DVIDS

How important is the military to Hawai'i's economy?

While the majority of residents (89%) agree the U.S. military is important to the state's economy, they are concerned about the impact that warfare training and other activities have on the environment, and they worry that military personnel who live off base are further straining the state's housing market.



Race, roots, education and economics shape sentiment



View Military as "Very Important" to Economy

Native Hawaiian / Part-Hawaiian	33%
Caucasian / Part-Caucasian	54%

Importance of Military Contribution

Born & Raised in Hawaiʻi	47%
Transplants to Hawaiʻi	56 %

Groups Showing Higher Support for the Military

- O'ahu residents
- Registered voters
- Financially secure individuals
- College educated
- People who believe the state is on the right track
- Republicans
- Males
- Older adults
- Affluent households
- Homeowners
- Transplants



The military conundrum

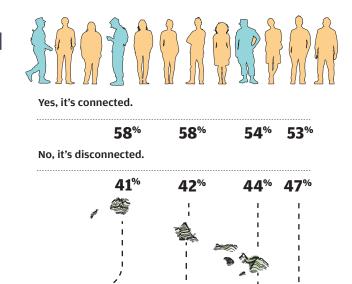
Military benefits vs. drawbacks

Hawai'i residents have a conflicted relationship with the military. The benefits are many - jobs, economic stimulus and regional security - but events in recent years have caused many to question the military's continued presence in the state. Despite criticism of the military in some sectors, nearly 7 in 10 respondents believe the advantages of the armed forces in Hawai'i outweigh the drawbacks. Respondents say, however, that the U.S. military should build more housing on its bases, be more transparent in its decision-making and improve communications with the community.

	AGREE	DISAGREE
Benefits of military presence outweigh drawbacks	%	10%
The military should build more housing on bases	%	24%
The military shows respect for Native Hawaiian culture and lands	%	43%
The military communicates well with residents	%	4 5 7 %
The military is transparent in decision-making	32%	5 %

Is the military connected to surrounding local communities?

When asked how connected the U.S. military is to Hawai'i's communities, results split sharply along political, demographic, and cultural lines. Overall, though, the majority of respondents (57%) feel the military has established connections to the local community.



High Stakes Negotiations for Hawai'i Lands

In 1964, the State of Hawai'i leased thousands of acres of land across the islands to the U.S.

Department of Defense for 65 years. Most of these leases were issued for just \$1 and are scheduled to expire between 2028 and 2031. The leases and easements held by the U.S. Army, Navy, and Air Force are on Hawai'i Island, O'ahu, Maui, Kaua'i, and Ni'ihau.*

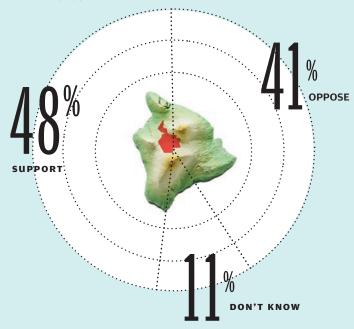
The Army holds the most significant group of leases — encompassing some 29,000 acres on Hawai'i Island and O'ahu — which expire in 2029. The Army announced earlier this year that it was downsizing its training footprint on O'ahu and would not seek to renew its lease for state lands in Mākua Valley. The service is currently in negotiations to retain roughly 22,000 acres of leased land on Hawai'i Island at Pōhakuloa Training Area (PTA), one of the only areas in the Pacific for long-range artillery training. At this time, it's uncertain if the proposed renewal terms and all of the acreage will be retained.

Many believe the land lease negotiations present an opportunity for the state to reassess its relationship with the military.

* Office of Hawaiian Affairs

Support leans toward retention of Pōhakuloa

Native Hawaiian groups, environmentalists, and community advocates have been the most ardent and vocal critics of the Army's use of Pōhakuloa, citing the presence of cultural sites and environmental damage. Although respondents are largely divided on the issue, slightly more of them (48%) are in favor of the Army retaining use of the state land while 41% said they oppose retention.





22,000 acres in limbo



Hawai'i's Hardest **Decisions Can't Wait**

Hawai'i is no stranger to crossroads and tough choices. We've faced them before, and each time, the decisions we've made have reshaped these islands. Among our notable moments: the exponential development that came after Statehood in 1959, the rapid growth of tourism in the 1970s and 1980s, the COVID-19 pandemic and a slew of natural disasters. Today, we stand at another turning point, confronting challenges that will determine whether future generations can thrive here or be priced out, pushed away and left behind.

Housing is the most urgent test

Castle & Cooke Hawai'i's Koa Ridge development in Waipi'o, which delivered more than 200 affordable townhomes to first-time buyers with below-market loans, offers a glimpse of what's possible. Yet the demand for affordable housing dwarfs such efforts. If we are serious about tackling the crisis, we must consider solutions that include fast-tracking affordable projects, encourage smaller-lot housing in underused areas, the possible use of state lands for housing development, and ensuring that infrastructure costs don't automatically inflate home prices. Building mixed-income communities and protecting existing affordable rentals are equally vital.

Expedite new home building

Hawai'i residents broadly agree on the urgent need for more housing, but opinions on how to achieve that goal vary across demographics. Younger and lower-income residents show the greatest frustration with red tape and favor strict limits on review timelines. Support for government condemnation is highest among young adults under 35 years of age and those in Central and West O'ahu, and weakest among older groups.

Homelessness: the human face of our housing shortfall

The growing visibility of encampments is a daily reminder of what happens when the cost of living outpaces wages. Other cities, notably Houston, have shown that "housing first" combined with supportive services can reduce homelessness dramatically. Hawai'i's kauhale villages—clusters of tiny communal homes with wraparound support—are a promising local model. But prevention is just as important. Small amounts of rent assistance or emergency aid can prevent families from falling into crisis.

Fix high energy costs

Some argue that importing liquefied natural gas (LNG) would allow us to replace oil in power generation, lowering electricity costs by as much as 15%. More than half of our respondents (52%) feel that way. LNG burns cleaner than oil and can stabilize the grid, but it risks delaying Hawai'i's transition to 100% renewable energy by 2045. Other places, like Puerto Rico and Massachusetts, have used LNG as a temporary fix and "bridge fuel." One solution would be for Hawai'i to treat it the same way.

Sufficient water is critical

Communities want to know that new housing will have sufficient drinking water. The Honolulu Board of Water Supply is investing in new sources and is moving forward on desalination, a strategy already used in San Diego, Tampa, and Santa Barbara. Desalination can serve as insurance against drought or emergencies and can play a role in protecting long-term supply.

Efficient preservation efforts

Preservation reviews are essential to protect Hawai'i's cultural treasures, but the long development delays that result often stall badly needed projects. One solution is not to cut corners, but to bring clarity and resources to the process-more staffing, digital tracking, and upfront mapping—so we can do both.







Moving Forward

Since 2019, PRP's Hawai'i Perspectives has tracked the pulse of our islands—capturing how residents view the issues that define our social landscape. Seven years later, the challenges before us remain steep, but not insurmountable. What they require is urgency and a willingness to share responsibility—between homebuilders and government, between the state and counties, and among all of us who have the privilege of calling Hawai'i home.

How do we generate the momentum—and the will—to tackle the hard issues head on?

We believe it begins with education. Learning about important issues is the way we gain the reliable information we need to make informed decisions. When knowledge and understanding prevail, hearsay and self-interest lose their grip.

Decisions cannot be made in silence or behind closed doors. Every voice must be heard. If you're not at the table, you're on the menu, as the saying goes. Dialogue must happen in talk story sessions, panels and forums, town halls, televised debates—even at watercoolers.

Lastly, we must put our voices into action by learning about political candidates and ballot issues and voting for those who best align with our own vision for the future. Here, we can do better. While 90% of those eligible to vote are registered, less than half have voted in all of the recent elections.

We'll always have to make hard calls, but they don't have to divide us. Despite our differences, we often share the same goals: a safe future for our children, stability for our families, preserving what makes our community thrive. When we ground ourselves in these truths and place fairness and respect at the center, we strengthen the connections that hold us together and help ensure that Hawai'i remains a place where families can live with dignity, security, and hope.

Hard calls, yes. But the worse call would be to do nothing.

—Pacific Resource Partnership





PRP Initiatives

Industry Integrity

Non-compliance with Hawai'i's labor, employment and construction sector 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.

Research

Data informs everything we

do. 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. In addition to Hawai'i Perspectives, we conduct data-driven work on specific projects and areas of activity that increase our understanding of the health of the industry, both locally and statewide, as well as Hawai'i's economy.

Partners For Democracy

Partners for Democracy is PRP's non-partisan civic leadership development program designed for emerging leaders who have a passion for political advocacy and a desire to bring about change in Hawai'i. The Partners for Democracy program teaches participants how to develop and execute successful political and public policy advocacy campaigns for those interested in making positive change by taking on leadership roles and advocating for economic, community, and social issues.

Executive Leadership Series

The Executive Leadership **Series** is an intensive, 9-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.

Hawai'i Directory of **Public Officials**

A public service provided by PRP, the Hawai'i 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 Hawai'i Institute for Public Affairs in 2018.

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 Hawai'i Directory of Public Officials and provides a tool for creating support for legislation and community efforts.

Download KĀKOU for free now:



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

Hawai'i Perspectives

An Initiative of PRP

