

O'ahu and Ko'olau Loa Community Values Survey



Prepared for the Envision La'ie Team

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Prepared By:

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Objectives and Methodology

- The Ko‘olau Loa Community Values Survey was designed to assess current awareness, attitudes, and opinions toward the Ko‘olau Loa Sustainable Communities Plan and its components.
- In order to accomplish these objectives:
 - 832 residents of O‘ahu were surveyed, including 157 residents from the Ko‘olau Loa district
 - Data was collected December 8 - 17, 2010 using a mixed mode methodology (part telephone, part online)
 - All data are weighted to reflect appropriate regional, gender and educational distributions
 - All interviews were conducted by Ward Research located in Honolulu, Hawaii
- Data Groups:
 - O‘ahu: all 832 respondents, weighted by region, gender, education
 - Ko‘olau Loa: (n=157) only those respondents within the region, weighted by city, gender and education

Key Findings

- ❑ Individual quality of life and direction of one's community are generally thought to be positive —much improved over 2 years ago.
- ❑ O'ahu residents empathize with issues facing residents in Ko'olau Loa region.
- ❑ Residents strongly support “moderate growth” in the Ko'olau Loa region.
- ❑ The majority of O'ahu residents believe “Keep the Country, Country” means supporting growth that improves the quality of life for residents.

Key Findings (cont'd)

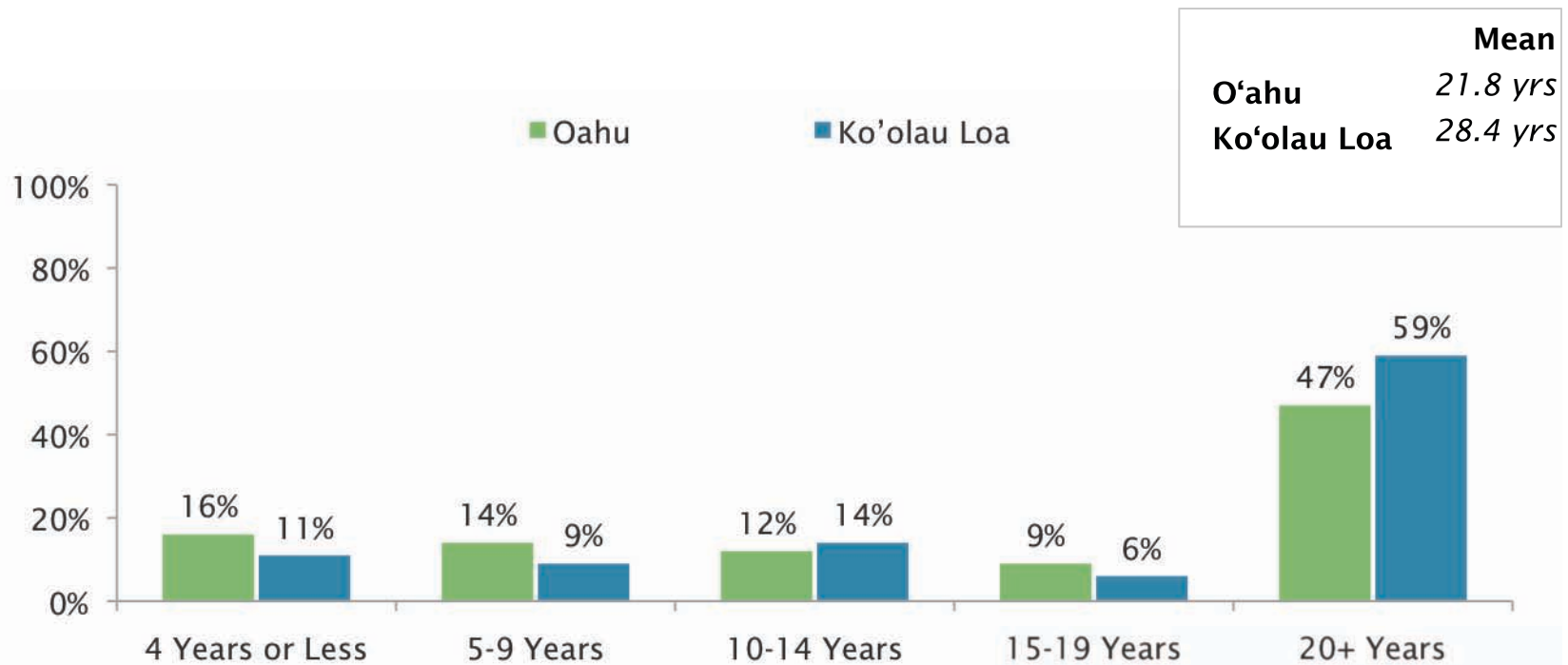
- ❑ Ko'olau Loa residents are highly aware of and active in the Ko'olau Loa Sustainable Communities Plan (KSCP) and process.
- ❑ The majority of Ko'olau Loa residents support land use strategies included in KSCP, notably those that preserve natural beauty and positively impact housing and jobs.
- ❑ Support for the proposed draft of the KSCP is strong.
- ❑ Replacement hotel in La'ie garners strong support Islandwide.

Context

Detailed Findings

Years Lived in Current Community

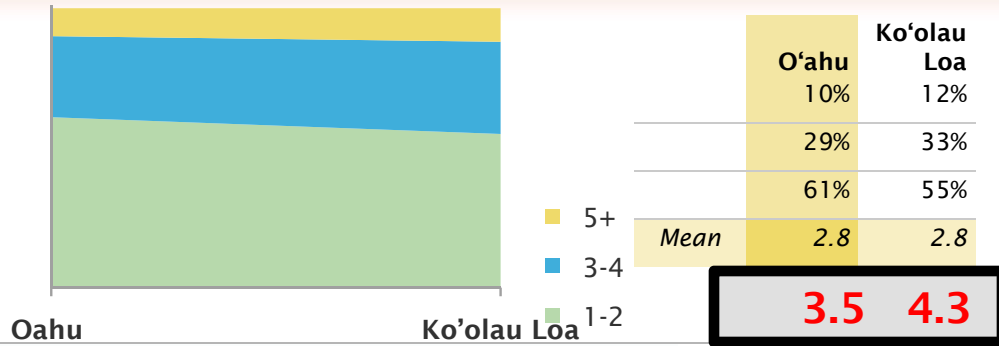
- Survey respondents are long-time residents of the communities in which they live, with Ko'olau Loa residents averaging nearly 28 ½ years, roughly seven (7) years more than residents of O'ahu.



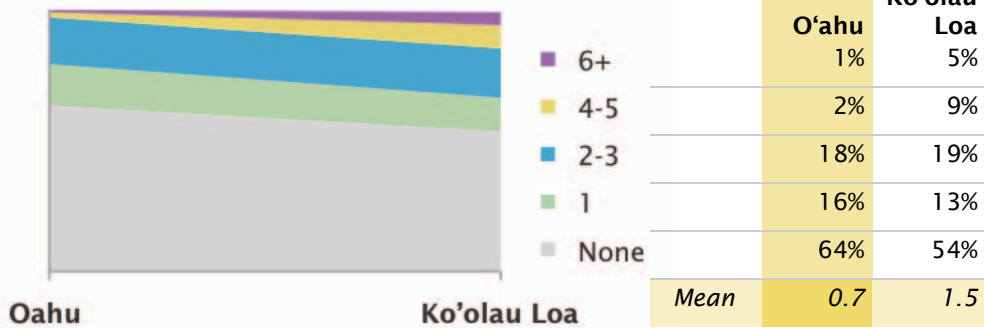
BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Household Size

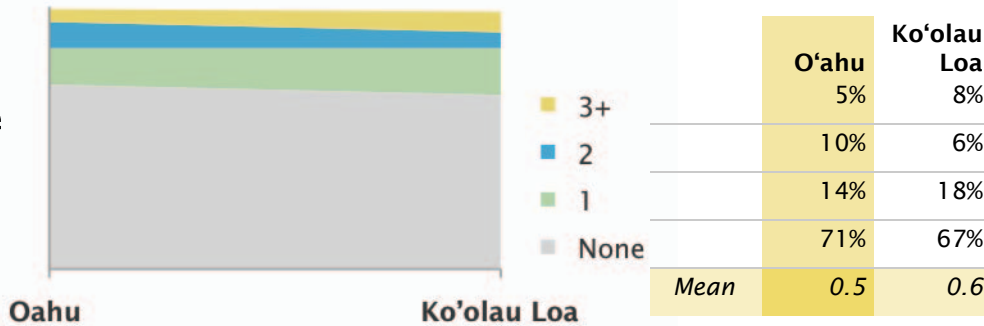
Adults in Household (Incl. Self)



Children in Household (Under Age 18)



Families or Generations Live in Home (Incl. Yours)

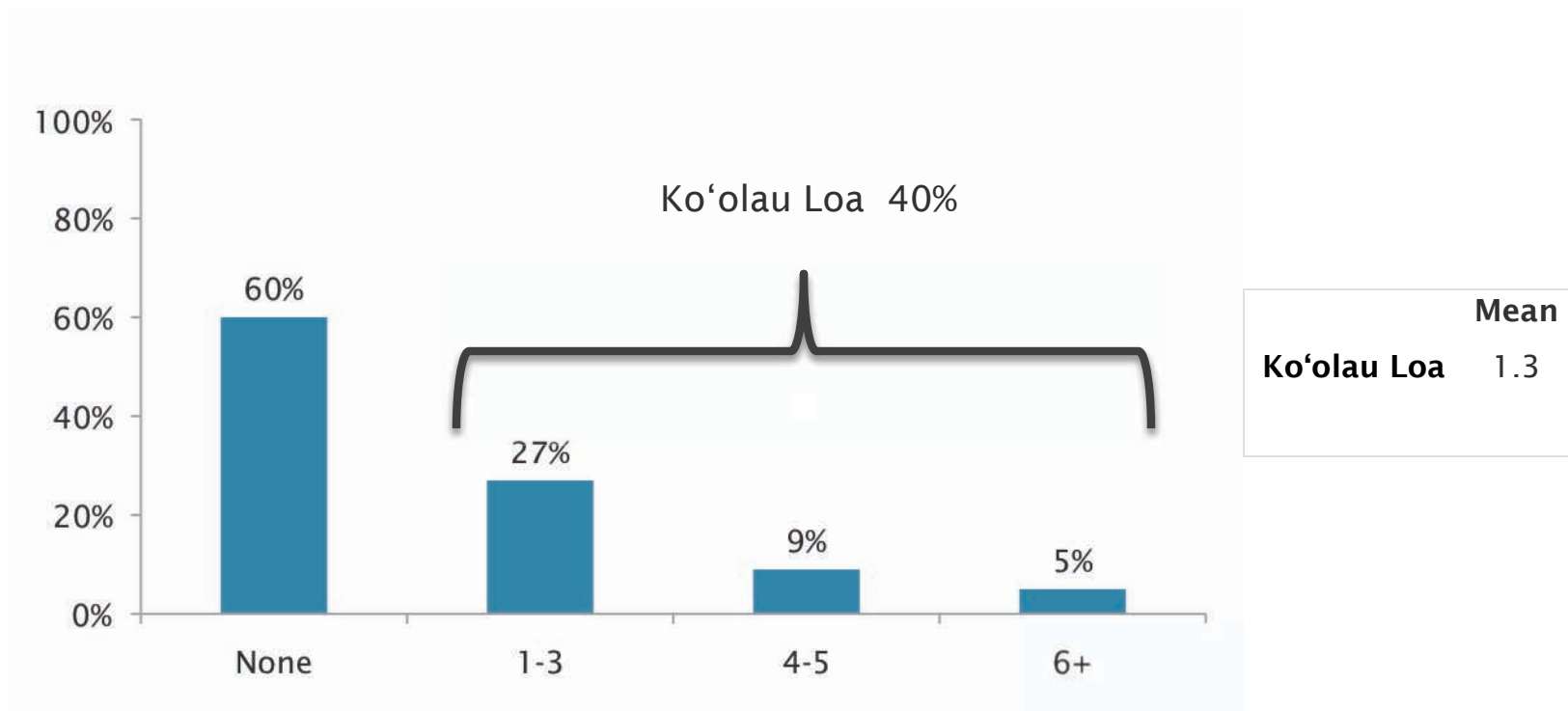


BASE: O'ahu (N=832), Ko'olau Loa (n=157)

- Average household size in Ko'olau Loa is 4.3, as compared to 3.5 in O'ahu.
- Additionally, in Ko'olau Loa, 1/3 report other families/generations on premises.

Relocated Family Members

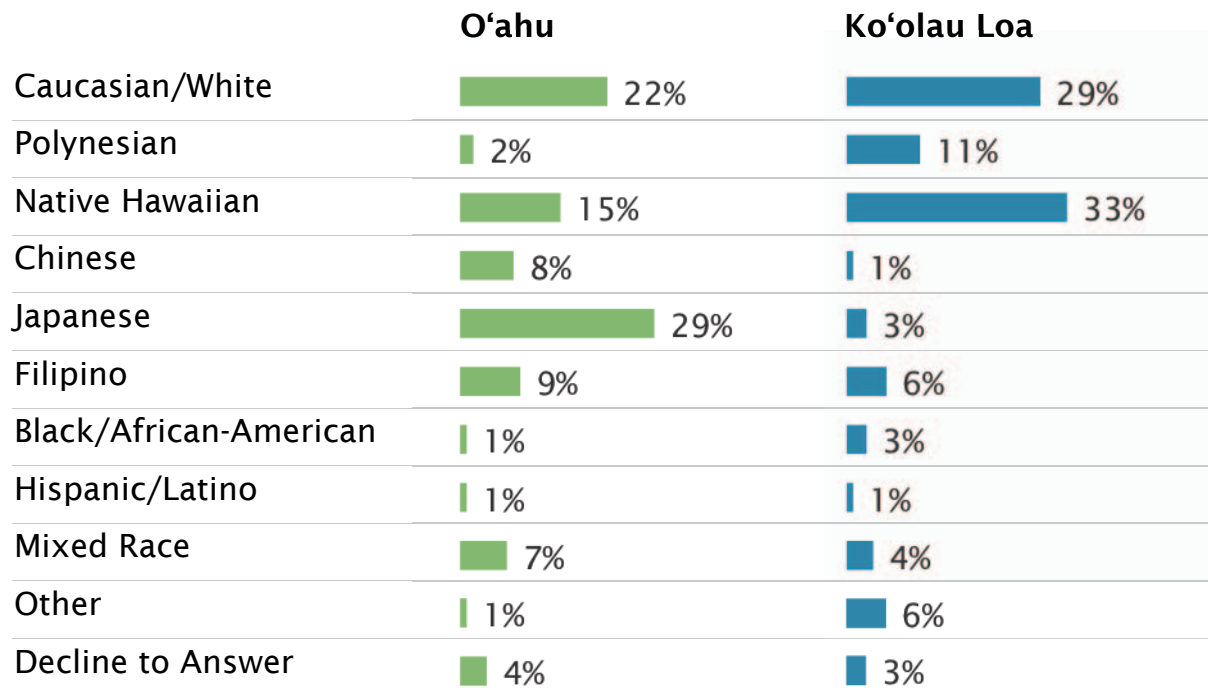
- Within Ko'olau Loa, two-in-five residents (40%) say that family members have had to move out of the region due to lack of jobs or because they couldn't find an affordable place to live.



BASE: IF LIVE IN Ko'olau LOA; Ko'olau Loa (n=157)

Q430. Some people have reported family members that have had to move out of the region due to the lack of jobs here or because they couldn't find an affordable place to live. Over that last 10 years, how many people in your family, if any, have moved somewhere else because they could not find a job or an affordable place to live in the Ko'olau Loa region?

Ethnic Makeup



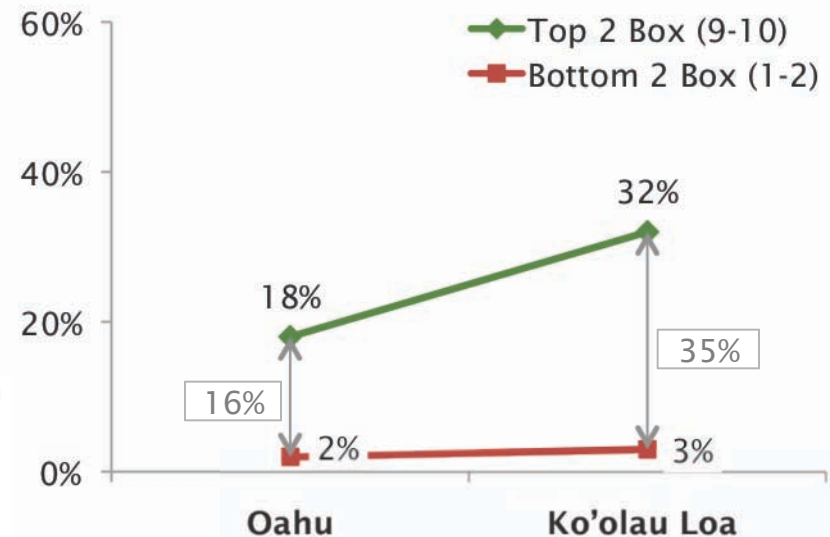
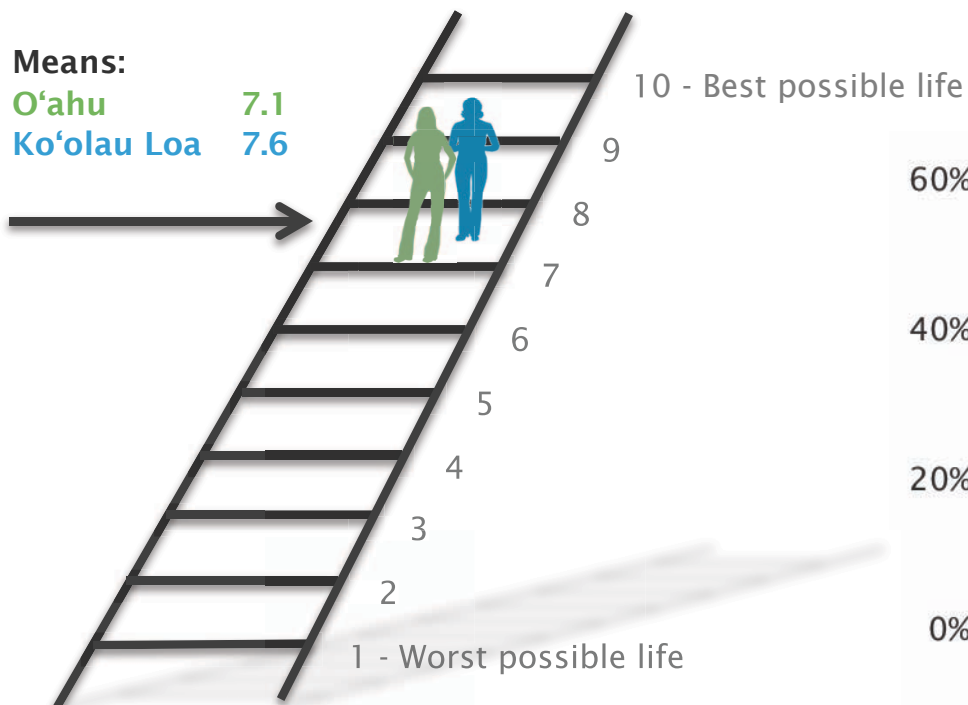
BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Quality of Life

Detailed Findings

High Quality of Life

- Residents in the Ko'olau Loa region are positive about their current quality of life in and around their community, giving a mean score of 7.6 on the 10-point scale.
- O'ahu residents, while still positive (mean score 7.1), are somewhat less so.
- Notably, the top two box percentage among Ko'olau Loa residents is twice that of O'ahu, indicating greater positivity in this part of the island.

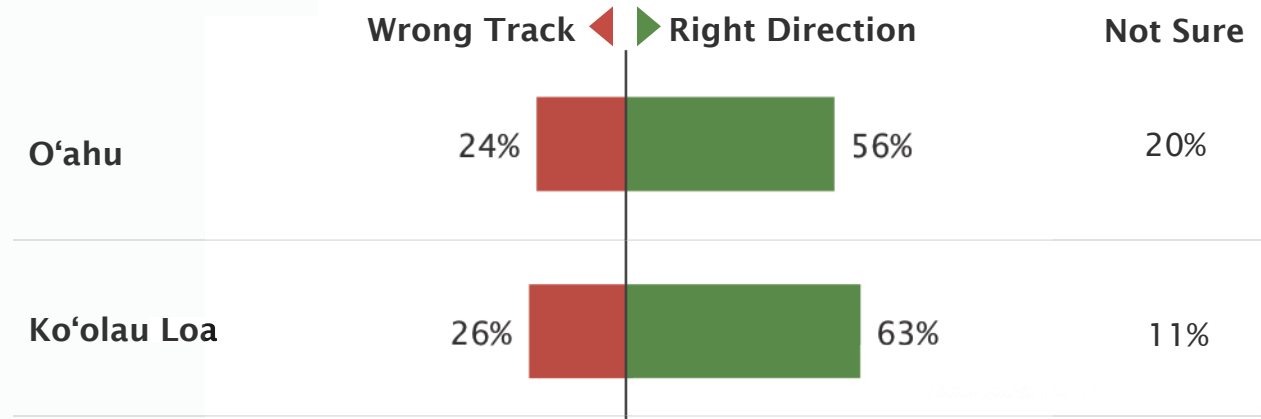


BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Q100. Thinking about the overall quality of your life in and around the community where you live, please imagine a ladder with ten steps representing the "ladder of life." Let's suppose the top of the ladder, the tenth step, represents the best possible life for you; and the bottom, the first step, the worst possible life for you. On a scale of 1 to 10, on which step of the ladder do you personally stand at the present time?

Local Community Today

- Nearly two-thirds (63%) of Ko'olau Loa district residents indicate that things in their local community today are heading "right direction" as compared with 56% of O'ahu residents. Roughly one-in-four (24% O'ahu; 26% Ko'olau Loa) are pessimistic, saying things have gotten off on the "wrong track."



BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Q140. On another subject, do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?

Challenges Facing Region

- While a myriad of challenges face O'ahu residents, those who reside in Ko'olau Loa focus on lack of affordable housing, too much development, too much traffic, jobs/unemployment and crime/drugs.

<i>% mentioning unaided</i>	O'ahu	Ko'olau Loa
Crime/drugs →	16%	10%
Too much traffic →	15%	12%
Poor quality of education	7%	5%
Homelessness	7%	2%
Jobs/Unemployment/wages →	7%	10%
Infrastructure (roads etc)	6%	6%
Economic conditions	4%	1%
Rising cost of living	4%	1%
Too much development →	3%	13%
Overcrowding/population	2%	1%
Lack of affordable housing	3%	18%

BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Q400. Thinking specifically about the region where you live, what would you say is the single most important problem facing your region?

Important Issues to Ko'olau Loa Region

- Across O'ahu, residents place highest priority on addressing three important issues facing the people who reside in the Ko'olau Loa region: education, jobs, and price to purchase a home.
- Among Ko'olau Loa residents, these issues are significantly more important than to the balance of residents of the island.

Top 2 Box (% Extremely + Very Important)

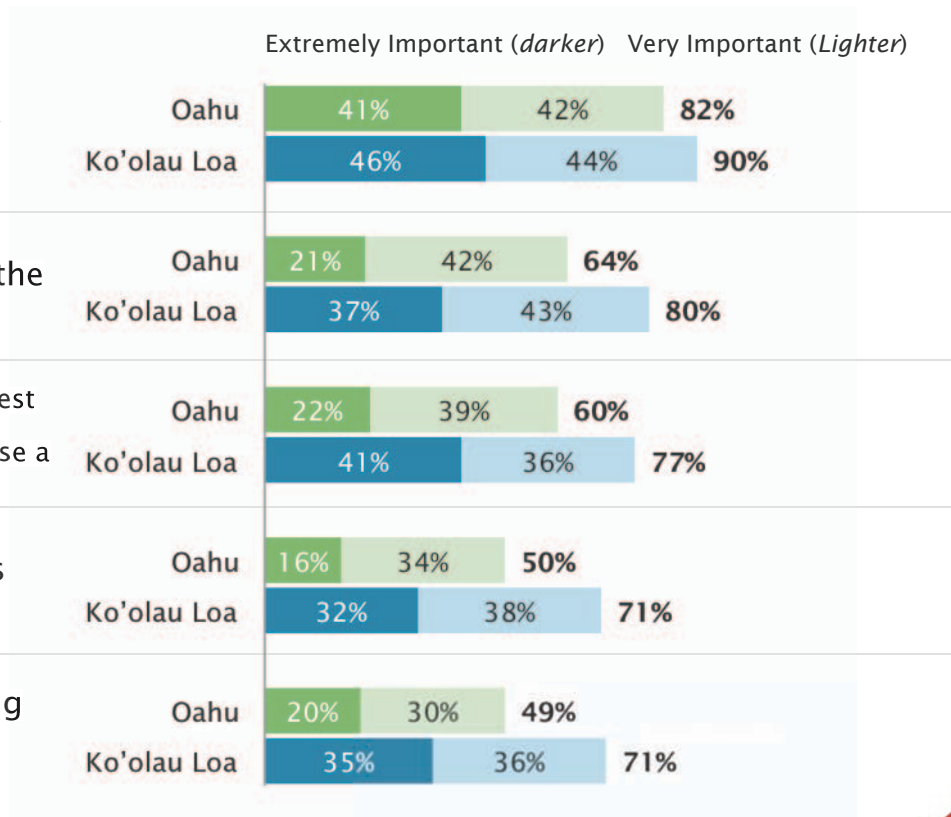
Math and Reading proficiency scores in the Ko'olau Loa school district are significantly lower than the rest of O'ahu

There are nearly 40% fewer jobs per household in the Ko'olau Loa district than the rest of the island of O'ahu

The average cost to buy a home in the Ko'olau Loa district is \$610,000 compared to \$541,000 in the rest of O'ahu. At current prices, more than 90% of the households in Ko'olau Loa can not afford to purchase a home

The level of crowding in households in the Ko'olau Loa region is nearly twice what it is on the rest of the island of O'ahu

Each year more homes in this area are being sold to outsiders



BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Q420. Following is a list of issues facing the people in the Ko'olau Loa region.

For each, please tell me how important you think it is that something be done to fix the problem mentioned:

Importance of Growth

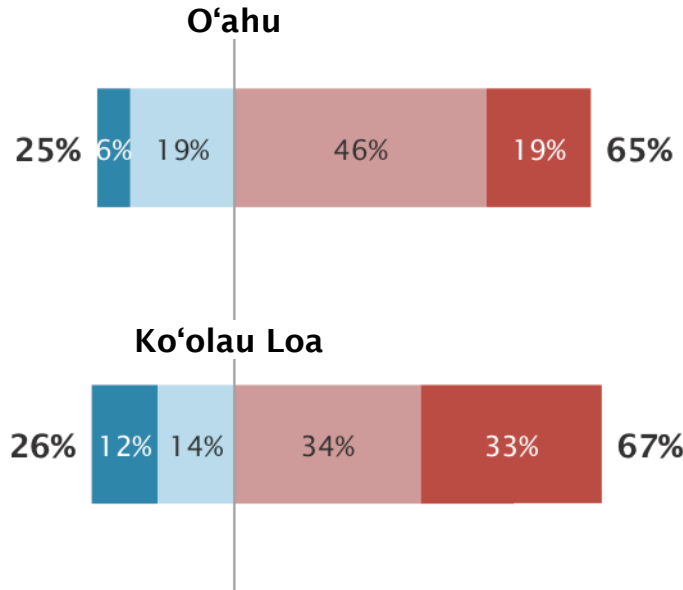
- By a margin of more than 2:1, two-thirds of O‘ahu residents believe that a “moderate amount of growth in the Ko‘olau Loa district is necessary” for the communities in the region to be vibrant and sustainable.
- Residents within and outside the Ko‘olau Loa region hold comparable opinions in this regard.

■ Exactly like Keawe
 ■ Somewhat like Keawe
 ■ Somewhat like Kalama
 ■ Exactly like Kalama

It is best if there is no growth in the Ko‘olau Loa district because that is the only way to preserve the rural feeling of the area. If the communities grow at all, they will lose their small town feel.

Mrs. Keawe

No Growth



A moderate amount of growth in the Ko‘olau Loa district is necessary for the communities in the region to be vibrant and sustainable. If a community stops growing it begins to stagnate and die.

Mrs. Kalama

Moderate Growth

BASE: O‘ahu (N=832), Ko‘olau Loa (n=157)

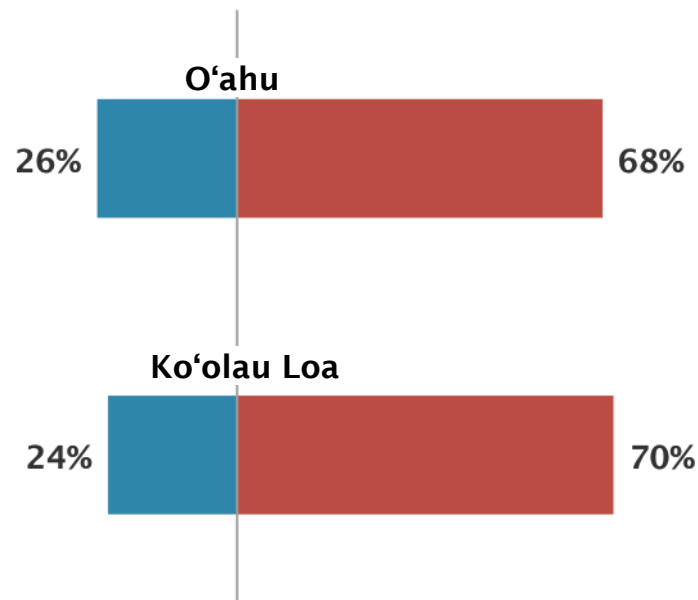
Q470. I am going to read the opinions of two hypothetical area residents. Please indicate which opinion comes closest to your own. Is your opinion more like Mrs. Kalama or more like Mrs. Keawe?

“Keep the Country, Country”

- ☑ To O‘ahu residents, “Keep the Country, Country” means saying “no” to any growth that attracts wealthy new home buyers into the area or more tourists but “yes” to growth that improves the quality of life for families that live here.”
- ☑ Ko‘olau Loa residents hold similar opinions.

“Keep the country, country” *means...*

...no growth or development of any kind



...“no” to any growth that attracts wealthy new home buyers into the area or more tourists but “yes” to growth that improves the quality of life for the families that live here

BASE: O‘ahu (N=832), Ko‘olau Loa (n=157)

Q480. There is a saying in the Ko‘olau Loa region, “Keep the country, country”. This saying means different things to different people. Which of the following best describes what this saying means to you?

Awareness of Ko'olau Loa Sustainable Communities Initiative

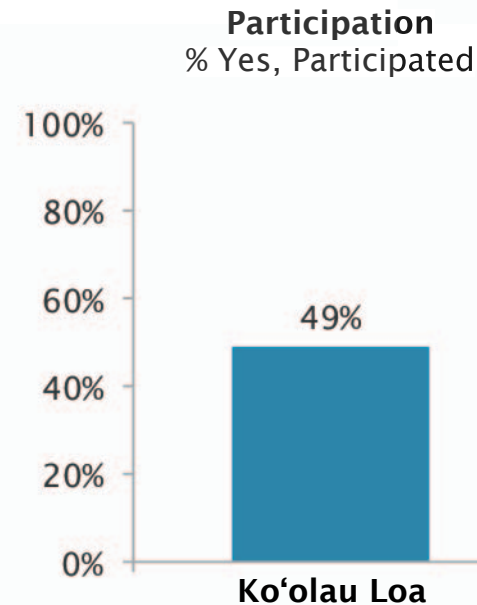
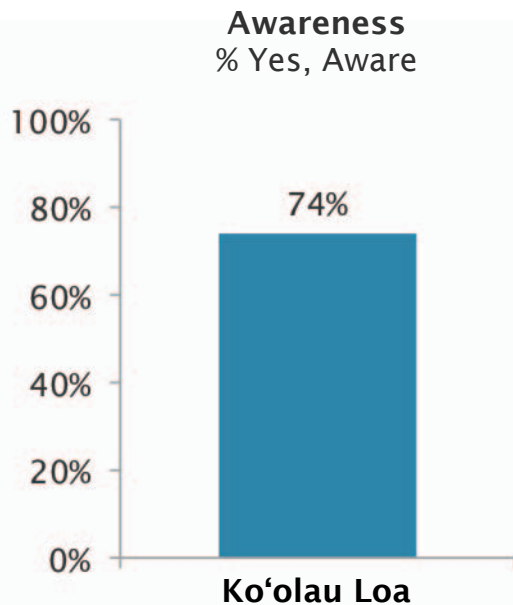
Detailed Findings

Awareness of and Participation in KSCP Activities

- Three-in-four (74%) Ko'olau Loa residents are aware of the KSCP plan, with half (49%) of those residing in Ko'olau Loa saying that they or a family member have participated in regional planning or envisioning activities.



Ko'olau Loa Sustainable Communities Plan



BASE: IF LIVE IN Ko'olau LOA; Ko'olau Loa (n=157)

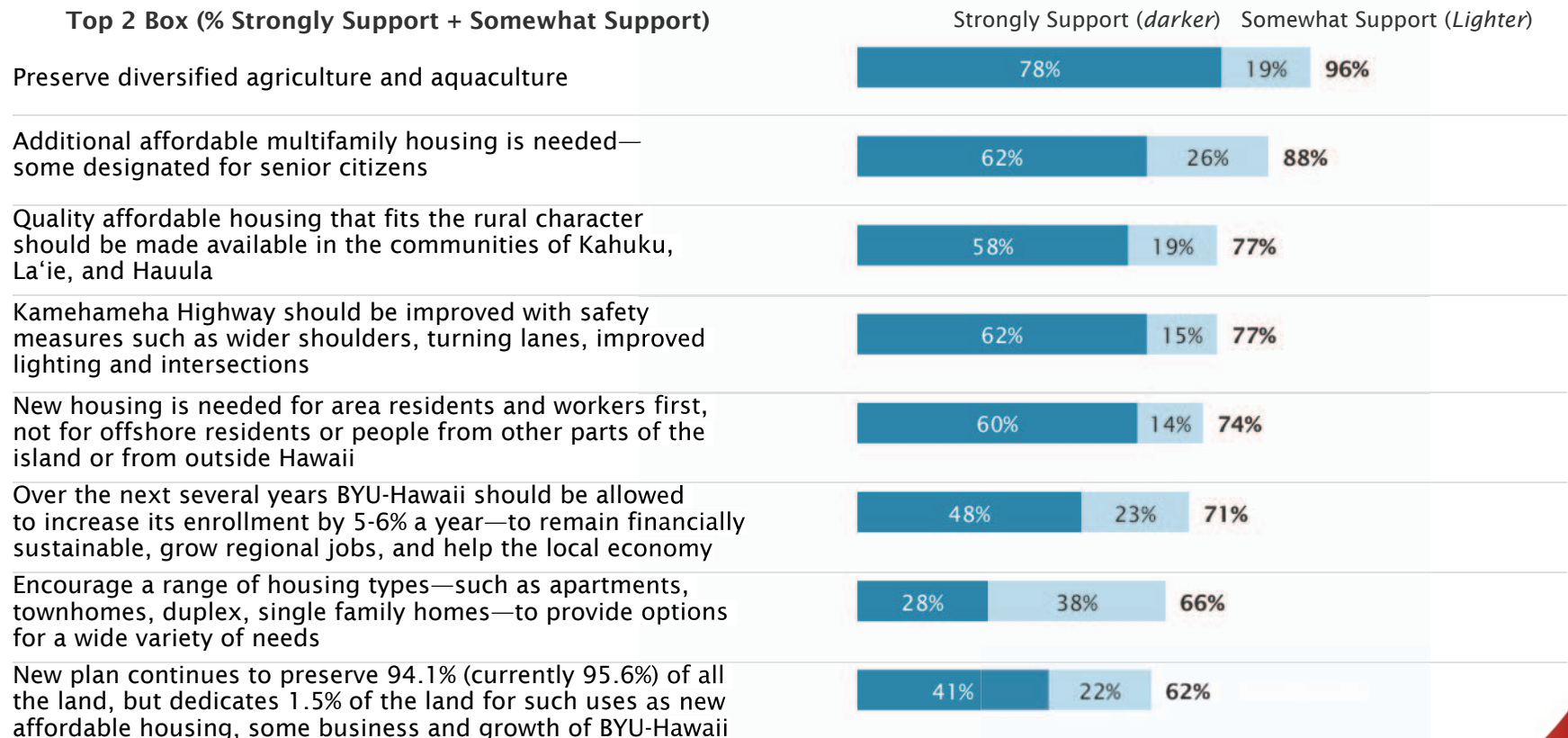
Q500. Over the past 2 years, there have been on-going discussions and community meetings about the Ko'olau Loa Sustainable Communities Plan and the future of the region. These discussions have focused on long range visions and policies to guide land use and infrastructure for the region over the next 25 years. Prior to taking this survey, have you heard, read or seen anything about this process?

Q520. Have you or a member of your family ever participated in the planning or envisioning process for the region by attending any meetings or speaking out on the issues you care about?

KSCP Land Use Strategies

- ▣ A minimum of three-in-five Ko‘olau Loa residents support each of the land use strategies currently included in the draft KSCP.
- ▣ Residents give greatest support to preserving agri/aquaculture, and strategies that promote affordable housing. Expanding BYU-H receives significant support as well.

Top 2 Box (% Strongly Support + Somewhat Support)

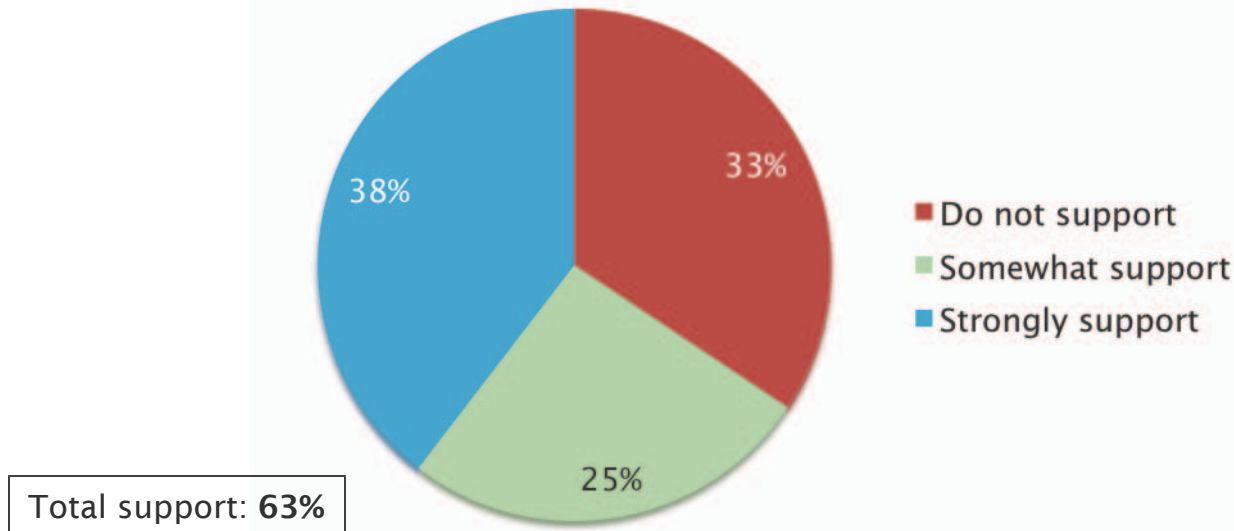


BASE: IF LIVE IN Ko‘olau LOA; Ko‘olau Loa (n=157)

Q550. The Ko‘olau Loa Sustainable Communities Plan (KSCP) was developed by the City and County of Honolulu’s Department of Planning and Permitting in order outline how growth should take place in the region over the next 25 years. Some of the policies propose how community needs should be balanced with the protection and enhancement of Ko‘olau Loa’s spectacular natural, scenic, and cultural qualities. How much do you support or oppose the following land use strategies planned for the Ko‘olau Loa District?

KSCP Support for Affordable Housing in Malaekahana

- Nearly two-thirds of Ko‘olau Loa residents support building “new affordable community housing” in Malaekahana, including 875 new housing units.

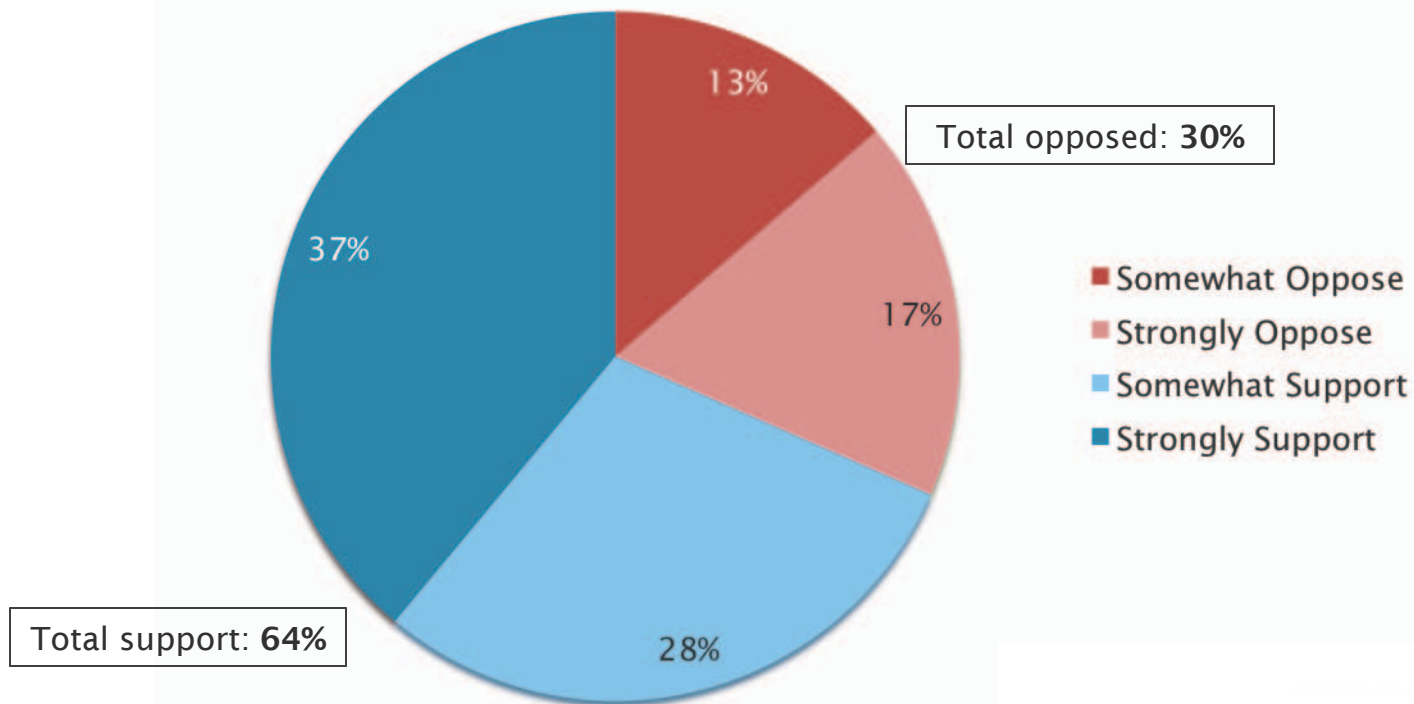


BASE: IF LIVE IN Ko‘olau LOA; Ko‘olau Loa (n=157)

Q560. The Ko‘olau Loa Sustainable Communities plan recognizes Malaekahana as a location in the Ko‘olau Loa district where there is sufficient land for the necessary infrastructure to build new affordable community housing to meet pent up demand for the people that live and work in the region. The plan proposes about 875 housing units to be built in Malaekahana in phases over the next 25 years. Which of the following best describes your feeling about building affordable community housing in Malaekahana.?

KSCP Support

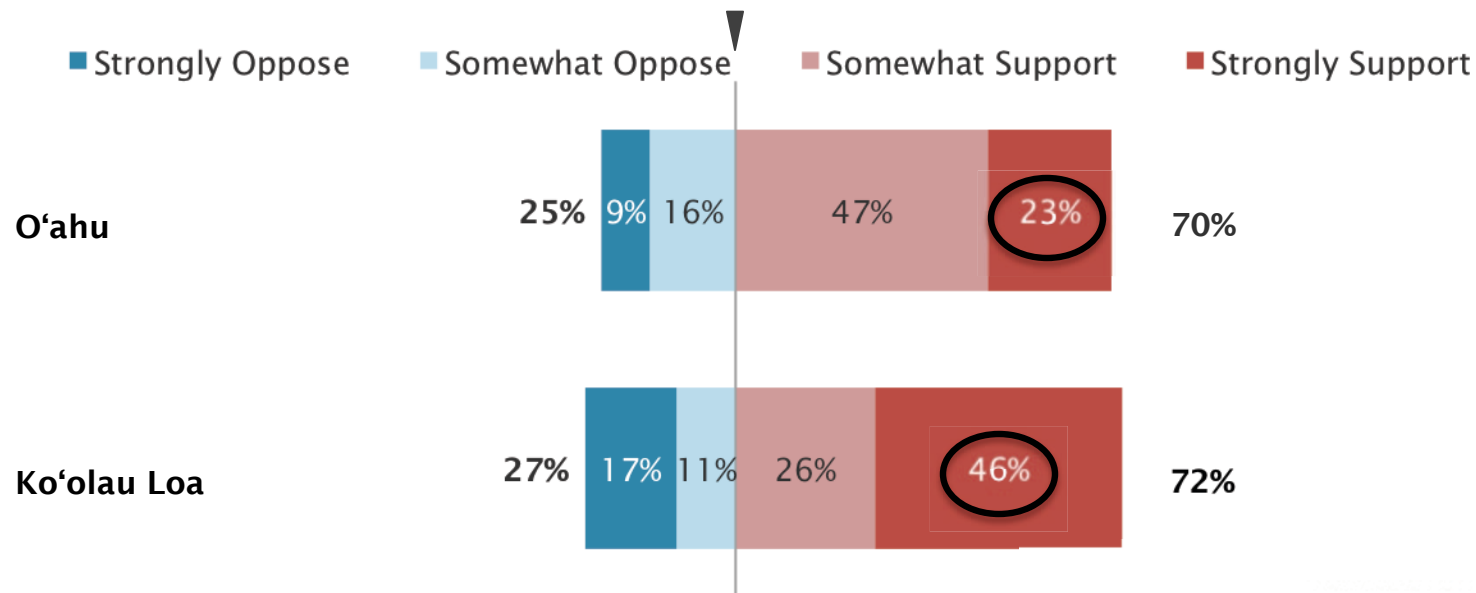
- Nearly two-thirds (64%) of Ko'olau Loa residents support the proposed draft of the KSCP, with more than half of these (37%) saying they "strongly" support it.
- Three-in-ten oppose the plan, with opinions divided relatively evenly between those who "strongly" oppose and those who "somewhat" oppose.



BASE: IF LIVE IN Ko'olau LOA; Ko'olau Loa (n=157)
Q570. Based on everything you have heard and read, do you support or oppose the proposed draft of the Ko'olau Loa Sustainable Communities Plan?

Support for Replacement Hotel in La'ie

- Seven-in-ten (70%) O'ahu residents support building a replacement hotel in La'ie on land already zoned for resort use.
- In the Ko'olau Loa district, overall support is comparable (72%) but stronger, with 46% of residents "strongly" supporting.
- Just more than one-in-four (27%) Ko'olau Loa residents oppose the replacement hotel.



BASE: IF LIVE IN Ko'olau LOA; Ko'olau Loa (n=157)

Q810. Currently there are plans to build a replacement hotel in La'ie on land already zoned for resort use. The 220 room hotel is designed with a Hawaiian architectural style and intended to provide family-priced rooms for out of town visitors of the students and families living in the area as well as for guests of the Polynesian Cultural Center. Which of the following best describes your feelings about such a hotel?

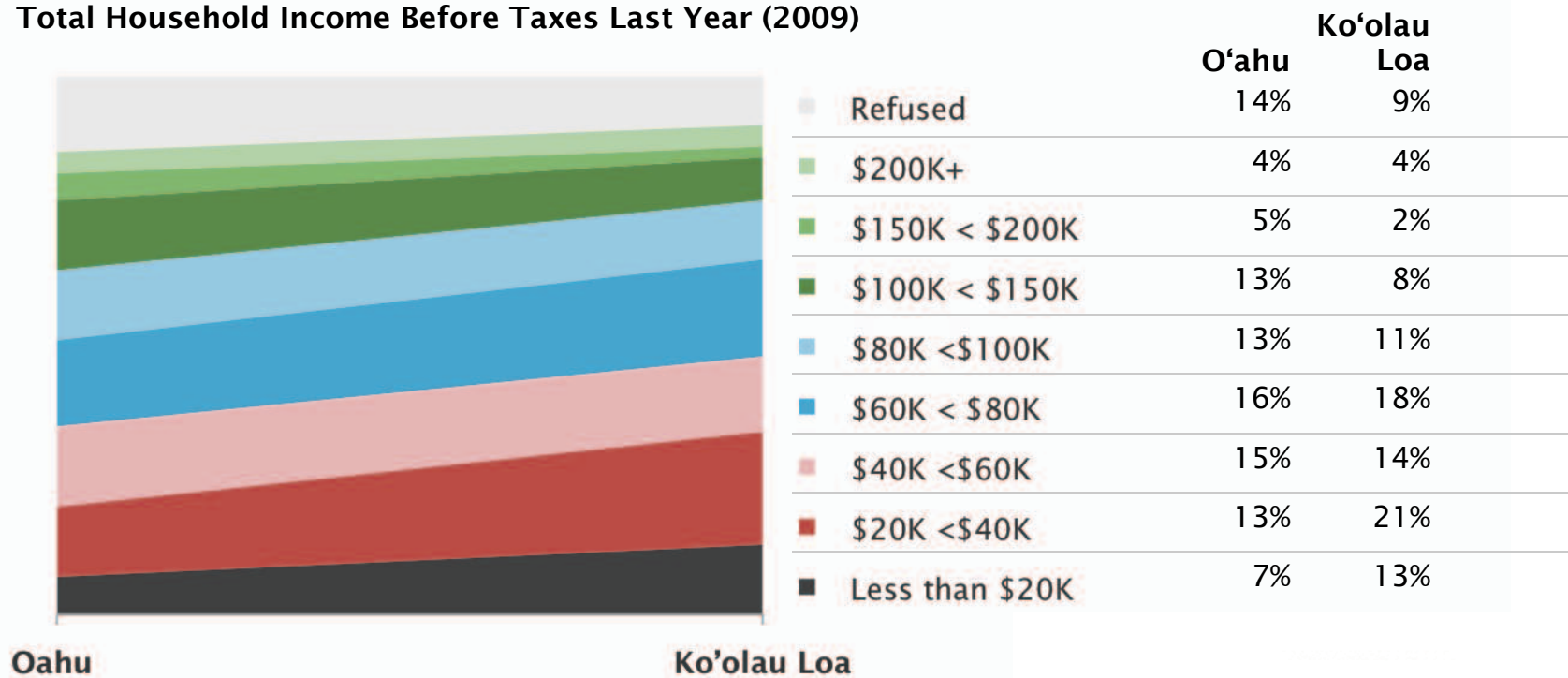
Demographics

Respondent Profile

	O'ahu	Ko'olau Loa
Gender		
Male	50%	50%
Female	50%	50%
Last Grade of Formal Education Completed		
Less than High School	7%	7%
H.S./GED/Vocational/Technical	26%	26%
Associates Degree	11%	11%
Some College	25%	25%
College Graduate	21%	21%
Grad School/Grad Degree	8%	8%
Religious Preference		
Episcopalian	1%	1%
Presbyterian	3%	1%
Methodist	1%	3%
Lutheran	2%	-
Baptist	3%	2%
Penecostal	2%	1%
Catholic	18%	12%
LDS/Mormon	4%	43%
United Church of Christ	8%	5%
Other Christian Churches	15%	12%
Other Non-Christian	8%	4%
Agnostic/Atheist	4%	-
None	20%	11%
Decline to Answer	13%	4%

Household Income

Total Household Income Before Taxes Last Year (2009)



BASE: O'ahu (N=832), Ko'olau Loa (n=157)

Heart + Mind

STRATEGIES

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- Heart+Mind Strategies is a national market research and polling firm located in Washington, D.C. The firm provides strategic research and consulting for the US Government, national industry and trade associations, nonprofits, and Fortune 500 companies.



WARD RESEARCH

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

- Ward Research is a respected market research and polling firm established in Hawaii in 1980. The firm works with companies in Hawaii's Top 250, government entities, and the nonprofit community.