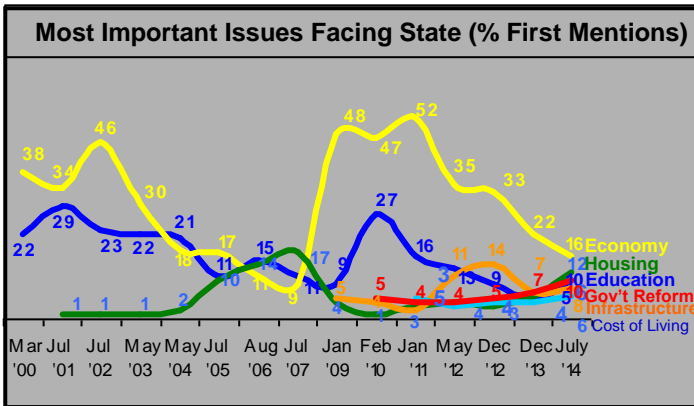


Summer 2014

Research conducted by OmniTrak Group Inc. and published as a community benefit

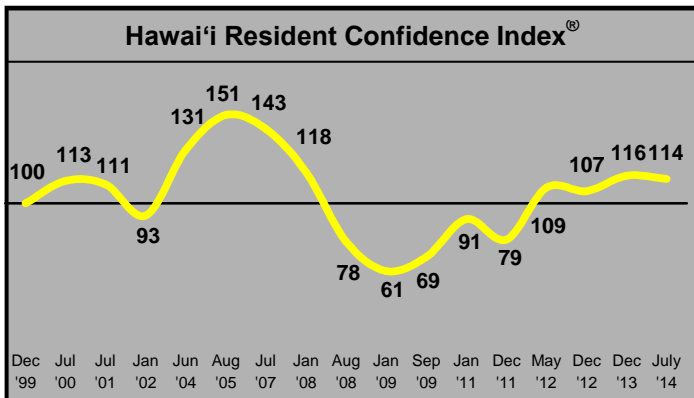
MORE DIVERSITY IN KEY STATEWIDE ISSUES

Hawaii's economy remains the state's No. 1 issue although the level of urgency relative to other concerns is clearly diminishing. Initial mentions of *the economy*, *budget deficits*, *the business climate* and *jobs* have fallen from a high of 52% in 2010 to just 16% in mid-2014.



Housing and homelessness is fast becoming a hot button concern, increasing from 6% to 12% in six months. **Education** as a priority is ticking up from 5% to 10%. **Infrastructure**, covering roads and mass transit, is flat at 8% of first responses.

RESIDENT CONFIDENCE INDEX FLAT

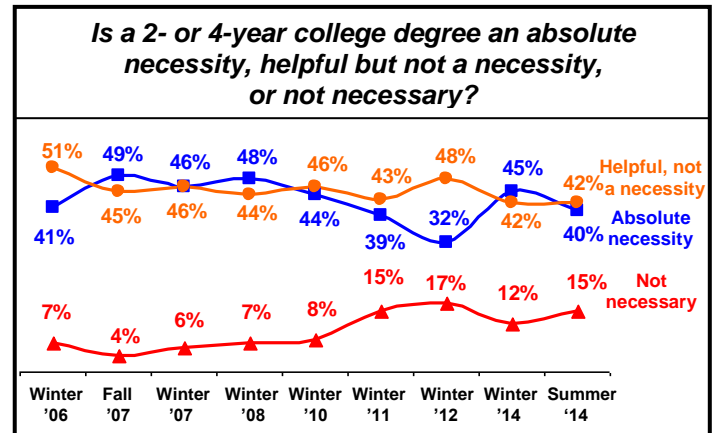


The Hawai'i Resident Confidence Index® – a barometer of residents' overall outlook – clearly has recovered since the lows of early 2009 but has recently flatlined over 2014, mirroring the tourism economy which, while still strong, has leveled off since the rapid expansion of the visitor industry in 2012.

The Summer 2014 issue of The People's Pulse is based on landline and cell phone interviews among a statewide random sample of 700 adult residents from June 13 to 29, 2014. Results are weighted to key population parameters. At a 95% confidence level the sampling error overall is +/- 3.7%. For more information contact OmniTrak Group at 808-528-4050.

VALUE OF A COLLEGE EDUCATION

Residents' belief in the value of a college education is holding steady. After falling to 32% in 2012, the percentage saying that a 2- or 4-year college degree is "an absolute necessity" rose to 45% in December before slipping to 40% in July 2014. This is about the same number as those saying a college degree is "helpful, but not a necessity," currently 42%. Only 15% recently said that a college degree is "not necessary."



STATE TECHNOLOGY INITIATIVE SUPPORTED

The state launched a transformation initiative in 2011 to reinvent state government by modernizing information systems and streamlining business practices. This effort is intended to make the state more efficient and to make delivery of state services faster and easier for residents and businesses.

Knowing the cost, 75% of residents across the state continue to support it. Of those using government services frequently (at least once every two months), 85% support the initiative.

