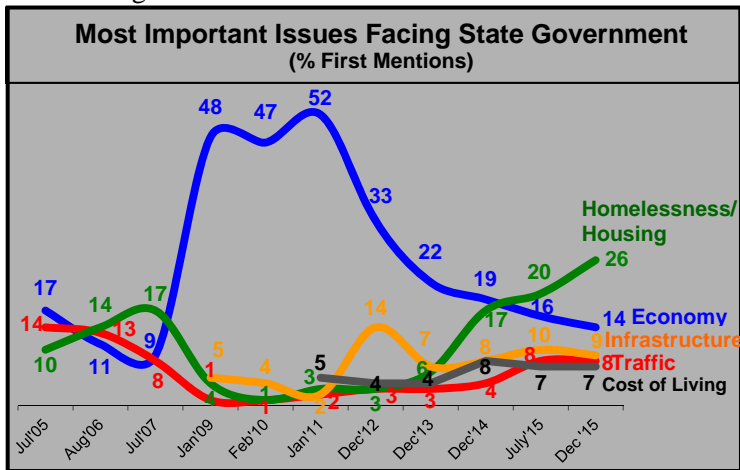


Winter 2016 (January '16)

Research conducted by OmniTrak Group Inc.
and published as a service to the community.

HOMELESSNESS MOVES TO THE FOREFRONT

The issue of “homelessness” is now the No. 1 issue facing Hawai'i State government, overtaking the economy, the cost of living, and infrastructure as the top statewide concern. Moreover, the homeless crisis is most acutely-felt on O'ahu and Maui where 24% and 21% cited it as the most important issue facing the state.



Housing affordability, overall, remains a concern across much of the state. “The price of housing has gone up too much,” said one O'ahu resident, “Our state has become a playground for the rich, putting the locals at a disadvantage.”

Other key issues tend to vary from island to island. Beyond housing, O'ahu residents worry more about the rail transit project and traffic congestion.

On the Big Island and Kaua'i, economic issues are No. 1 and housing issues No. 2. Many on Kaua'i are concerned about their island's high cost of living, road infrastructure, and drug abuse.

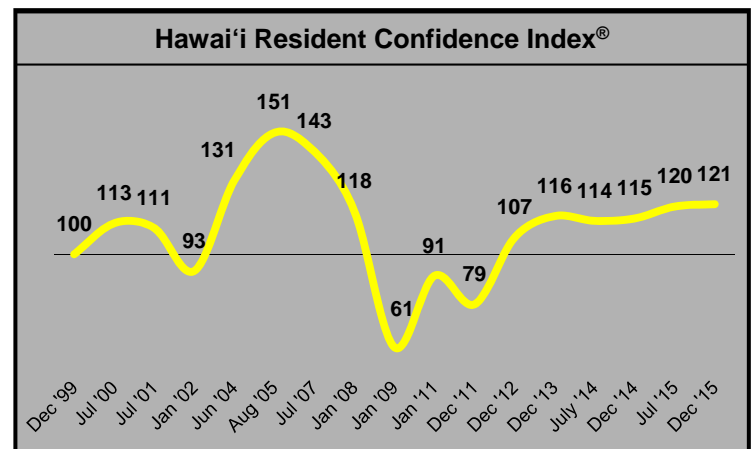
More Big Island residents cite the recent dengue fever crisis, Native Hawaiian claims and health care costs as key issues. “There are not enough doctors on the Big Island,” said one Hawaii resident.

But Education, including the public school system, has fallen off as a major concern of residents despite ongoing regular media coverage. Just 4% of the public cited education as a major issue facing state government.

The Winter 2016 issue of The People's Pulse is based on landline and cell phone interviews with a statewide random sample of 700 adult residents from November 30 to December 13, 2015. Results are weighted to key population parameters. At a 95% confidence level the sampling error overall is +/- 3.7%. For more information, please call OmniTrak Group Inc. at 808-528-4050, or email wenli@omnitrakgroup.com.

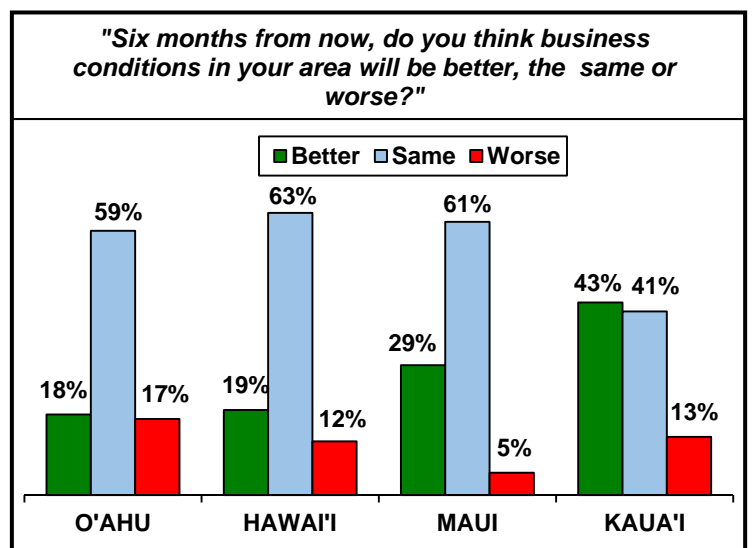
RESIDENT CONFIDENCE INDEX RISING

The Hawai'i Resident Confidence Index®, a barometer of residents' outlook on their economic prospects, has roughly paralleled the state economy over the past decade. With tourism and construction booming and unemployment at record lows, the Hawai'i Resident Confidence Index has recovered most of the ground lost in the 2008-09 recession, and is trending upward, albeit gradually – predicting that consumer spending will remain at healthy levels in the near-term.



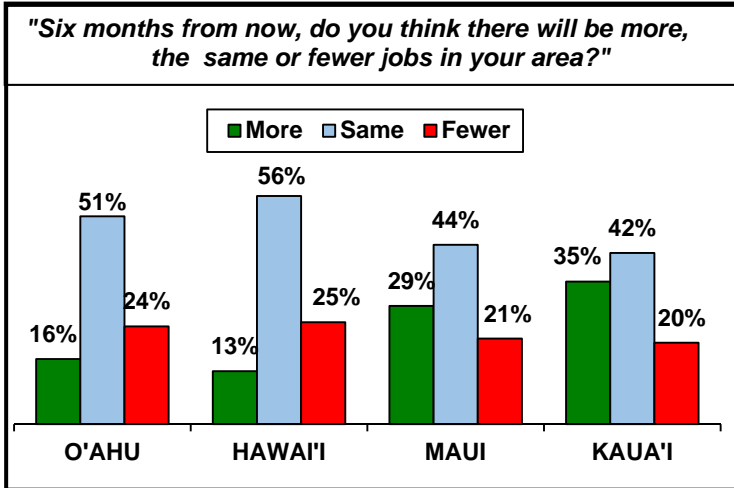
CONFIDENCE HIGHER ON MAUI AND KAUA'I

Across the state, economic confidence varies by island. Kaua'i residents are the most confident about business conditions on their island, while O'ahu residents are the least confident about business prospects. On Kaua'i, 43% say business will improve vs. just 18% on O'ahu.

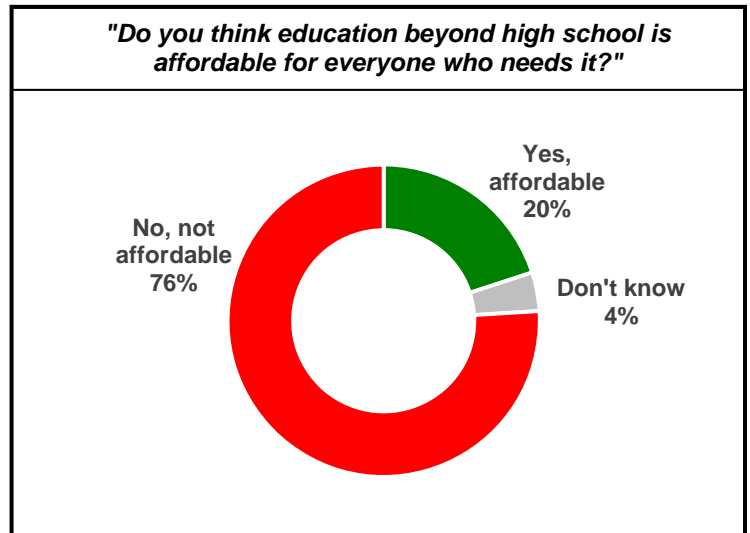


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Similarly, optimism about jobs is highest on Kaua'i and Maui, where close to one-third of residents believe that the job market will improve in six months versus just 16% on O'ahu.

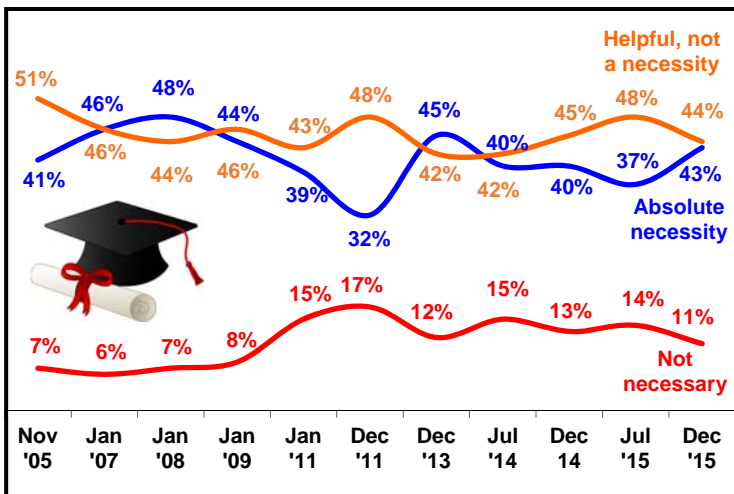


work two or more jobs just to make ends meet," said one resident about the costs of attending UH Manoa.



VALUE OF A COLLEGE EDUCATION IS HIGH...

Higher education remains a relative priority for residents, 87% of whom continue to endorse the value of a 2- or 4-year college degree, split evenly between those saying it is an "an absolute necessity" and those saying it is "helpful but not a necessity." Only 1 in 10 (11%) feel that a degree is "not necessary."



... BUT COLLEGE AFFORDABILITY IS LOW

While higher education may be important, affording the cost of education is another matter. In fact, a large majority (76%) do not believe higher education is "affordable to everyone in this state who needs it." Only 20% believe it to be universally affordable to everyone.

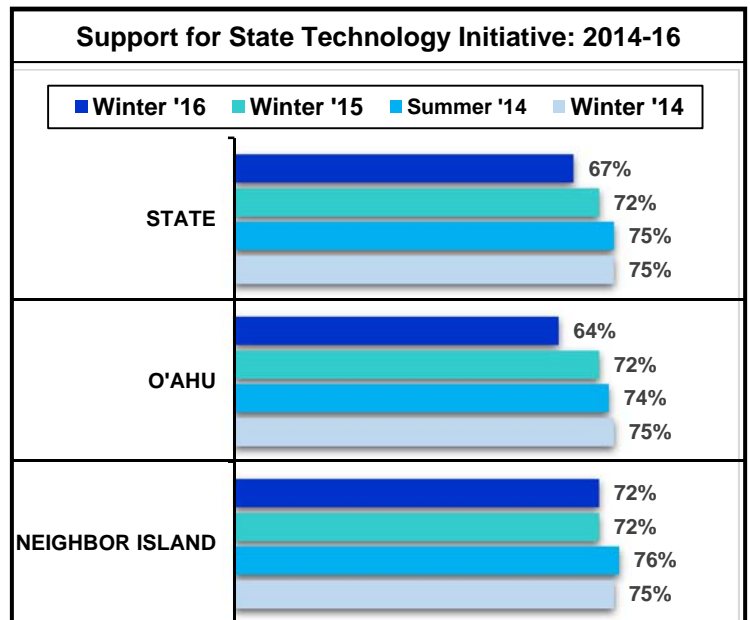
To some, the "cost of living" is a major barrier to affording higher education. "Because [of] the cost of living, a lot of people can't afford education on top of everything else," said one resident.

Others cited rising tuition at Hawai'i colleges as a hardship on students trying to pursue college degrees. "They keep raising tuition prices every year and many students have to

MAJORITY CONTINUES TO SUPPORT STATE TECHNOLOGY INITIATIVE

The State Technology Transformation Initiative was launched in 2011 to reinvent state government by streamlining business practices and investing in modern information systems to make service delivery faster and easier for residents.

Two-thirds or 67% of residents across the state support the initiative, citing efficiency, modernization, and streamlining processes as key reasons. Support from Neighbor Islanders held steady at 72%, while O'ahu resident support has softened from 72% to 64%. The level of support is evenly distributed among heavy, medium, and light users of state services.



Among supporters of the initiative, there is increased recognition that state government is out of date; more than 40% believe state government needs to modernize, up from 17% last year. In addition, 59% of supporters now say that the initiative will improve government and make it more efficient and easy to use, up from 26% one year ago.