HONOLULU RAIL TRANSIT STUDY
MAY 2011

BACKGROUND & METHODOLOGY

PB Americas, Inc. has contracted QMark Research to conduct a quantitative study in the form of telephone interviews among residents of the island of Oahu.

A total of 902 surveys were conducted beginning on May 9, 2011 and ending on May 20, 2011. The targeted sample distribution was 100 surveys in each City Council District. The margin of error for a sample of this size (n=902) is +/- 3.27 percentage points with a 95% confidence level.

The sample for which the results from this project are based were derived using QMark's Random Digit dialing software. A mix of 45% wireless phones and 55% landline users was the targeted goal.

Each respondent was screened to ensure they were at least 18 years of age, resided full-time at the residence they are being contacted at and that they did not work in the fields of marketing, market research, advertising, or public relations.

SECTION 1 – RAIL TRANSIT PROJECT

Degree of Support

Oahu residents were presented with the following descriptive statement:

> *The City and County of Honolulu is moving forward with the development of a 20-mile elevated rail transit line that will connect West Oahu with Honolulu International Airport, downtown Honolulu and Ala Moana Center.*

Residents were then asked to rate their overall level of support for this project. They were instructed to quantify their perceptions using a standard four-point rating scale with they strongly support this project assigned a value of four and they strongly oppose it assigned a value of one. The table below highlights the percent results as well as the mean or average score.

Strongly Support (4)	30%
Somewhat Support (3)	27%
NET SUPPORT	57%
Somewhat Oppose (2)	15%
Strongly Oppose (1)	25%
NET OPPOSE	40%
Don't know/ Refused	3%
MEAN	2.64

Overall, 57% of Oahu residents polled currently support the rail transit project to varying degrees. Thirty percent strongly support rail transit on Oahu while another 27% somewhat support it. At the opposite end, 15% somewhat oppose this project while 25% strongly opposes rail on the island.

- Support for rail transit on Oahu is stronger among younger residents. For example, among adults 18 to 34 years of age, 70% support this project to varying degrees. By comparison, support dips to 48% among residents 65 and older.

The table below breaks down the results by City Council district. The results show at least half the residents in each district support this project as was described to them in this portion of the research.

	Dist 1 Berg	Dist 2 Martin	Dist 3 An-derson	Dist 4 Chang	Dist 5 Koba-yashi	Dist 6 Gab-bard	Dist 7 Cachola	Dist 8 Hari-moto	Dist 9 Garcia
Strongly support (4)	36%	25%	19%	25%	25%	26%	37%	39%	36%
Somewhat support (3)	21%	30%	32%	30%	25%	36%	20%	29%	23%
NET SUPPORT	57%	55%	51%	55%	50%	62%	57%	68%	59%
Somewhat oppose (2)	13%	18%	17%	8%	19%	17%	13%	14%	12%
Strongly oppose (1)	27%	25%	27%	33%	27%	22%	24%	16%	25%
NET OPPOSE	40%	43%	44%	41%	46%	39%	37%	30%	37%
Don't know	3%	3%	5%	4%	4%	-	6%	2%	4%
MEAN	2.68	2.56	2.45	2.49	2.50	2.65	2.74	2.93	2.73

Support ranged from a relative low of 50% in Council District 5 to a high of 68% in Council District 8. In no council district did opponents outnumber supporters of rail transit.

Next, we provide a brief profile of supporters and opponents of this project.

	SUPPORT	OPPOSE	COMMENTS
PEAK COMMUTER	60%	55%	Half who oppose rail commute during peak hours
WILL USE RAIL	68%	14%	14% who oppose project expect to use it
HOUSEHOLD SIZE			
MEAN	3.52	3.64	
LIVED OUTSIDE HI	56%	43%	Supporters more likely to have lived outside HI
REG VOTER	81%	87%	
AGE			
18-34	24%	14%	Supporters of the rail project tend to be younger on average.
35-49	26%	23%	
50-64	34%	39%	
55+	14%	19%	
MEAN	47.52	51.92	
ETHNICITY			
Caucasian	29%	31%	
Japanese	20%	17%	
Hawaiian	15%	23%	
Filipino	16%	10%	
HSE INCOME			
< $50K	25%	27%	
$50K-$100K	31%	29%	
$100K+	31%	25%	
Refused	14%	19%	
GENDER			
Female	52%	49%	
Male	48%	51%	

As far as segmentation is concerned, we will note that certain themes will remain relatively constant throughout the study.

- Younger segments of the population tend to view this project more favorably.
- Support for rail tends to be stronger among more affluent sectors of the community. These individuals more readily accept this project's benefits.

Reasons for Support

Next, respondents were asked why they support or oppose the rail project as described to them in this section of the research.

N=514	70%	Traffic- something needs to be done
	15%	Reliable/ Convenient/ Faster
	13%	Helps environment-less cars/gas use
	11%	Economy- create jobs
	9%	Route concern
	6%	Personally use/ know people who will use
	5%	Route- like
	4%	Provides an alternative form of transportation
	3%	Concerned about cost

Seventy percent of those who indicated they support this project say they do so for the simple fact that something needs to be done to address the traffic problem on Oahu. Fifteen percent believe it will be a more reliable and faster way to commute while another 13% feel it will benefit the island by taking cars off the road and lessening our dependence on foreign oil. Eleven percent supports this project because of its positive economic impact it will likely have.

- Male (15%) respondents are more likely to mention the project's economic impact as a reason they support rail transit on Oahu than are their female (8%) counterparts.

Reasons for Opposition

N=357	52%	Too expensive/ cannot afford
	26%	Will not use/ Route doesn't service my area
	25%	Ridership- not enough people will use
	18%	Prefer alternatives- bus/other
	11%	Taxes- too much/high
	11%	Elevated rail- ugly/ ruins sightlines
	11%	Will not solve traffic problem
	10%	Route concern
	5%	Construction- create more traffic

Half (52%) the people who oppose this project do so because they fear its expected cost. Another one in four (26%) oppose it because they believe they will not directly benefit from it. A similar number (25%) are of the opinion that ridership estimates are not high enough to support its construction. Eighteen percent prefer alternatives to rail.

Roughly one in ten opponents lists reasons like the already high amount of taxes residents pay, that the elevated rail will ruin Hawaii's natural beauty, that it will not solve the island's traffic woes and that the route does not meet their expectations.

- Among opponents, males (14%) are more likely to be of the opinion that rail will not solve Oahu's traffic problems than are their female (7%) counterparts.
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Rail Transit – Perceived Need

In order to further probe community perceptions regarding this project, Oahu residents were asked about the need for rail transit on Oahu.

RAIL IS NEEDED	76%	37%	Badly needed
		39%	Needed but concerned about cost
RAIL IS NOT NECESSARY	20%		

Thirty-seven percent feel this project is badly needed and is long overdue. Just one in five (20%) residents believes that rail transit is not needed on Oahu. Thirty-nine percent of those polled believe that rail transit is needed but are concerned about the cost.

- Among those who say they oppose this project in the prior section, half (49%) agree that rail is needed but are concerned about the cost. Even among supporters of the project, a third (31%) worries about the cost.

- Support for this project is higher in more affluent segments of the community. For example, 30% of those residing in households with combined incomes of $50K or less agree that rail is badly needed and long overdue. By comparison, this number increases to 47% among those who reside in households earning a combined $100K/year or more.

Rail Transit – Perceived Investment Value

In this next section of the research Oahu residents were asked if they felt the rail transit system is a good investment for the future of the island. They were asked to quantify their perceptions using a four-point rating scale with they feel rail transit is a very good investment for Honolulu's future assigned a corresponding value of four and it is a very poor investment assigned a value of one. The table below highlights the percent results as well as the mean or average score.

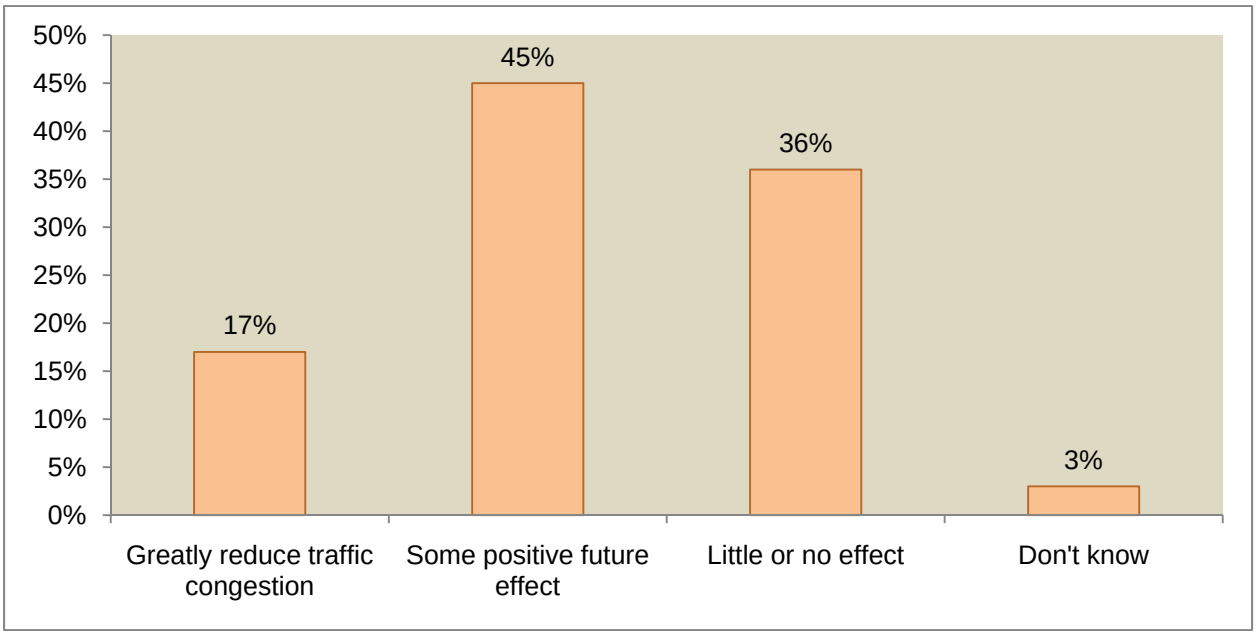
Very good investment (4)	29%
Somewhat good (3)	29%
NET GOOD INVESTMENT	58%
Somewhat poor (2)	15%
Very poor (1)	23%
NET POOR INVESTMENT	38%
Don't know	4%
MEAN	2.66

Overall, 29% believe rail transit is a very good investment in the future of Honolulu. An equal number (29%) describe it as a somewhat good investment. Of the remainder, 15% feel it is a somewhat poor investment while 23% describe it as a very poor investment. Four percent are undecided.

- Younger residents are more inclined to support the idea that rail transit is a good investment for Honolulu's future than are older segments of the population. For example, among Oahu residents between the ages of 18 and 34, 72% agree that rail transit is a good investment. By comparison, this number drops to 49% among Oahu residents 65 and older.

Impact on Traffic

In this section of the research Oahu residents were asked if they felt the rail transit system would have an impact on future traffic congestion on the island.



The research indicates 17% of those polled believe rail transit on Oahu will greatly reduce traffic congestion. Nearly half (45%) see some positive effect as a byproduct of rail. Of the remainder, 36% believe this project will have little or no effect on traffic.

- Younger segments of the sample are more apt to believe that rail transit on Oahu will have an impact on traffic.

Impact on Economy

In this section of the research respondents were presented with the idea that the rail transit project will bring jobs to Oahu and help the overall economy of the island. They were then asked to rate how strongly they agreed or disagreed with this statement. They were instructed to quantify their perceptions using a four-point rating scale with they strongly agree with this idea assigned a corresponding value of four and they strongly disagree with it assigned a value of one. The table below highlights the percent results as well as the mean or average score.

Strongly agree (4)	29%
Somewhat agree (3)	41%
NET AGREE	70%
Somewhat disagree (2)	14%
Strongly disagree (1)	13%
NET DISAGREE	27%
Don't know	3%
MEAN	2.89

Overall, 29% strongly agrees that the rail transit project will bring added jobs and help to improve the overall economy on Oahu. Another two in five (41%) respondents somewhat agree with this statement for a total of 70% agreeing the project will have much of an impact economically.

SECTION 2 – BENEFITS OF RAIL SYSTEM

In this section of the research Oahu residents were presented with eight potential benefits associated with the rail transit project. After being read each benefit they were asked to rate its importance to them personally. Respondents were told to quantify their perceptions using a four-point rating scale with it is a very important benefit of rail transit assigned a corresponding value of four and it is of no benefit at all assigned a value of one. The table below highlights the percent results as well as the mean or average score.

	Very Important	Some-what Imp	NET Benefit	Very Sm Benefit	No benefit at all	NET No Benefit	MEAN
It will save riders money on gas, parking and vehicle maintenance	43%	32%	75%	12%	10%	22%	3.11
It will be a convenient and reliable form of transportation	42%	30%	72%	15%	10%	25%	3.07
It will provide economic stimulus such as job creation	38%	36%	74%	15%	10%	25%	3.04
Rail will reduce future traffic delay	34%	29%	63%	17%	16%	33%	2.85
Rail will help protect our environment by taking cars off the road	34%	29%	63%	17%	18%	35%	2.82
Building a rail transit system will get more and more expensive in the future so building it today just makes sense	36%	26%	62%	12%	21%	33%	2.82
Development around transit stations will bring benefits to the communities where they are located such as affordable housing, commercial developments like retail stores, bike paths and parks- creating more livable communities	29%	35%	64%	17%	15%	32%	2.81
Rail will allow growth and development to continue to be directed to Leeward & Central Oahu instead of other parts of the island so that the City can continue to keep the Country, Country	28%	32%	60%	16%	18%	34%	2.76

The research shows that when evaluated on an individual basis the top three benefit statements tested are that rail will save riders money that would otherwise be spent on gas, parking and maintenance, that it will provide a convenient, reliable form of transportation, and that it will serve as an economic stimulus for the island.

SECTION 3 – HONOLULU TRANSIT AUTHORITY

At the outset of this section of the research each respondent was read the following statement:

> *The new Honolulu Authority for Rapid Transit will design, construct, operate and maintain the rail transit system. Other major U.S. cities have established public transit authorities to plan, build, operate and maintain their rail systems. The purpose of the transit authority is to provide for an efficient process in managing all aspects of the rail project. The Honolulu Authority for Rapid Transit will begin operations on July 1, 2011.*

Research respondents were then asked how strongly they agreed or disagreed with this statement. They were instructed to quantify their perceptions using a standard four-point rating scale with they strongly agree with the statement assigned a corresponding value of four and they strongly disagree with it assigned a value of one. The table below highlights the percent results as well as the mean or average score.

Strongly Agree (4)	30%
Somewhat Agree (3)	39%
NET AGREE	69%
Somewhat Disagree (2)	10%
Strongly Disagree (1)	15%
NET DISAGREE	25%
Don't know/ Refused	6%
MEAN	2.89

The result show two-thirds (69%) of the voters agree with the statement presented to them in the above description. Twenty-five percent disagree with it while 6% are unsure how they feel.

- A solid majority in each council district agrees with the description of the role the transit authority would play in managing rail transit on Oahu.

In this section of the research respondents were read eight statements describing the role the transit authority might play here on Oahu. After being presented with each they were then asked to rate how much of a benefit it was in their minds. They were instructed to quantify their perceptions using a standard four-point rating scale with it is a very important benefit assigned a corresponding value of four and it is no benefit at all assigned a value of one. The table below highlights the percent results as well as the mean or average score.

	Very Important	Some-what Imp	NET Important	Somewhat Unimp	Very Unimp	NET Unimp	MEAN
The authority would have a single purpose and mission to manage the rail system	51%	34%	85%	4%	7%	11%	3.34
The authority would prepare and manage its own budget separate and apart from the city budget	48%	31%	79%	4%	10%	14%	3.26
Because it would only concentrate on the functions of transit, a semi-autonomous authority will make faster decisions	48%	32%	80%	5%	11%	16%	3.23
The Authority will establish all fares, fees and charges for the rail system	41%	43%	84%	5%	8%	13%	3.22
A semi-autonomous authority would have more continuity over the course of time and leadership would not be dependent on a Mayor or council members who leave office after their terms expire	45%	35%	80%	5%	9%	14%	3.22
A semi-autonomous authority would keep the politics out of decision-making	50%	26%	76%	6%	13%	18%	3.18
The authority would be able to promote, create and assist with transit-oriented development projects along the rail line	31%	44%	75%	7%	12%	19%	2.99
The authority would be able to enter into contracts and agreements independently, without administrative approval	28%	39%	67%	8%	16%	24%	2.86

When evaluated on an individual basis we find the three benefits that most resonate with Oahu residents are that the Transit Authority would have a singular purpose, that the Authority would manage its own budget independently and that it would only concentrate on functions related to rail allowing it faster decision-making.

SECTION 4 – INFORMATION/DEGREE OF UNDERSTANDING RAIL PROJECT

In this section of the research respondents were asked to describe their level of understanding regarding Oahu's rail transit system. They were instructed to quantify their perceptions using a standard four-point rating scale with they feel very well informed assigned a corresponding value of four and they consider themselves to be poorly informed assigned a value of one. The table below recaps the percent results as well as the mean or average score.

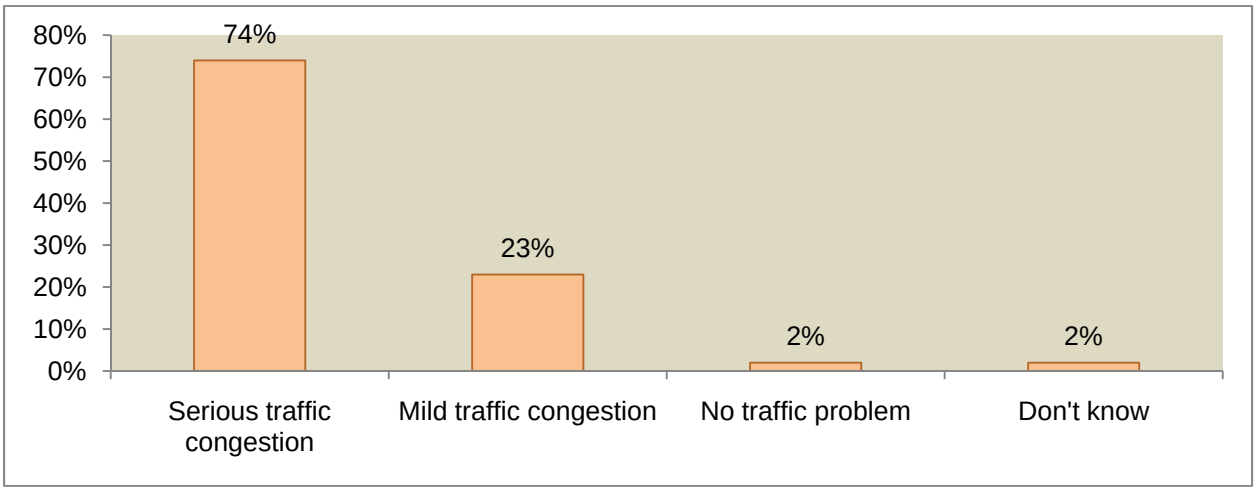
Very well informed (4)	21%
Somewhat informed (3)	47%
NET INFORMED	68%
Somewhat poorly informed (2)	18%
Very poorly informed (1)	12%
NET UNINFORMED	30%
Don't know/ Refused	3%
MEAN	2.80

The research shows a majority of Oahu residents feel generally informed when it comes to the rail transit project. Twenty-one percent feel they are very well informed while another 47% feel they are somewhat informed when it comes to rail. At the opposite end, 18% describe themselves as being somewhat poorly informed while 12% feel they are very poorly informed.

Supporters of rail transit generally consider themselves to be more informed than are those who oppose the project. For instance, 82% of those who support rail transit on Oahu consider themselves to be at least somewhat informed regarding the project. By comparison, 50% of rail opponents classify themselves as being poorly informed about the project.

SECTION 5 – GENERAL PERCEPTIONS/ TRAFFIC

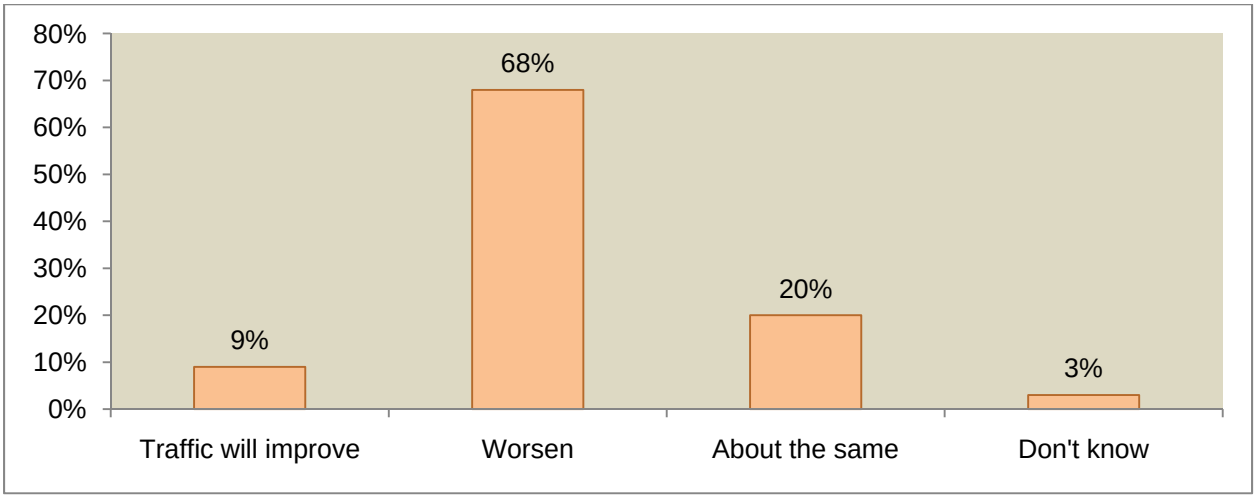
At the outset of the study Oahu residents were asked for their views regarding the Island's current traffic situation.



Overall, three in four (74%) Oahu residents polled agree that we have serious traffic congestion on the island. Another 23% classify the traffic situation as being mild. Just 2% don't recognize a traffic problem on the island.

- 71% of rail opponents agree that we have serious traffic issues on Oahu.

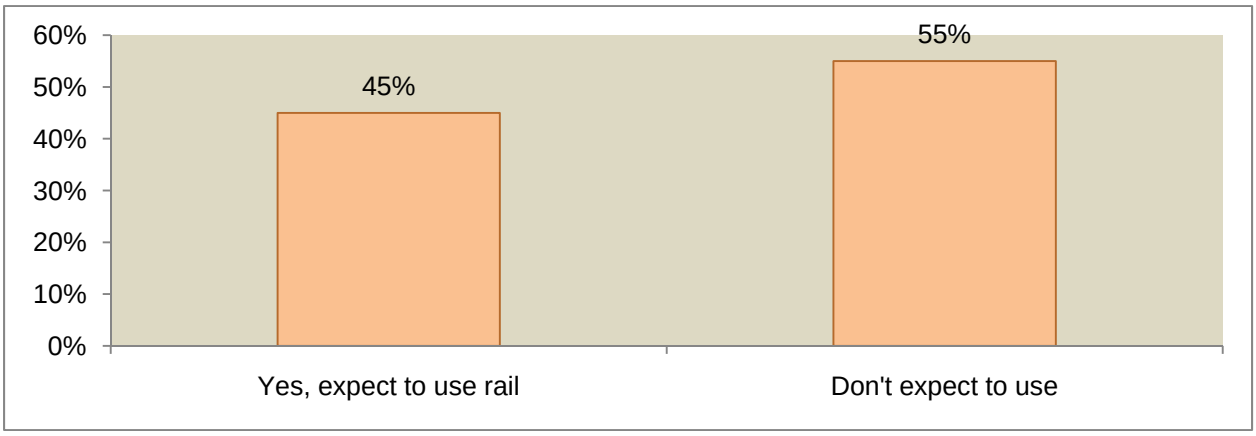
Next, these same individuals were asked to imagine Oahu's traffic situation 10 years from now.



Just one in ten (9%) see the traffic situation on Oahu improving over the next ten years. Sixty-eight percent feel things will only get worse while 20% expect no change.

SECTION 6 – RIDERSHIP

At the outset of this section of the research Oahu residents were asked if they expect to ride the rail once it has been completed.



The research shows 45% of Oahu residents polled expects to utilize the rail transit system once it is operational.

In this next section of the research we estimate the effect rail might have on daily commuters.

PEAK TIME COMMUTER	CURRENT MODE OF TRANSPORTATION PEAK TIME COMMUTER/ N=522
58%	84% Car 19% Bus 8% Carpool 6% Walk 3% Bicycle

Fifty-eight percent of the Oahu residents polled indicate they commute during peak AM and PM hours.

- At least 52% or more in each council district say they commute during peak rush hours.

Among this segment, 84% commute by car during rush hour while 19% take the bus. Eight percent carpool while 6% walk.

The research shows one in four (23%) Oahu residents polled drive a car that could potentially be taken off the road with the construction of the rail system (best case scenario - expected rail user + commute during peak times + drive car during commute).

SECTION 7 - NET EFFECT

After exposing research respondents to the potential benefits of rail transit on Oahu they were asked once again for their feelings regarding this project. They were told to use the same four-point rating scale used in the prior question to test for any movement one way or the other.

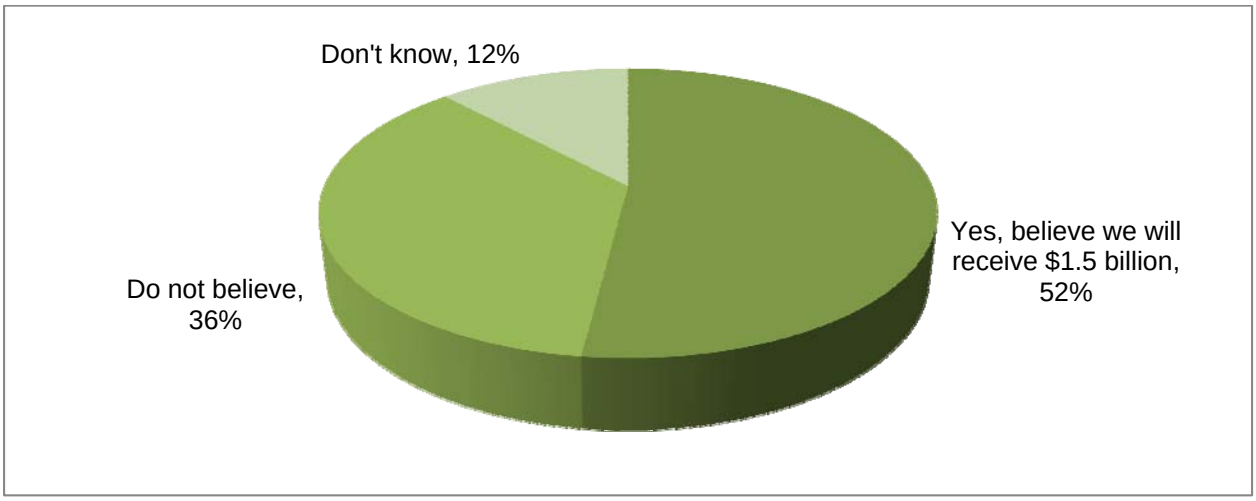
	PRE-SURVEY	POST-SURVEY	NET +/(-)
Strongly support (4)	30%	34%	4.0
Somewhat support (3)	27%	27%	-
NET SUPPORT	57%	61%	4.0
Somewhat oppose (2)	15%	13%	(2.0)
Strongly oppose (1)	25%	26%	1.0
NET OPPOSE	40%	39%	(1.0)
Don't know	3%	1%	(2.0)
MEAN	2.64	2.68	.04

The results show exposing residents to the various issues discussed in the survey results in a positive swing of four percentage-points.

SECTION 8 – OTHER ISSUES

Federal Funding

Oahu residents were asked if they believe that the Federal Government will actually provide $1.5 billion dollars of funding for this project.



The research shows half (52%) the Oahu residents polled are confident that we will receive the expected $1.5 billion in Federal funding designated for this project.

- Male respondents (58% believe we will get the funds) tend to have more faith in the Federal Government funding this project than do their female counterparts (46% believe we will get the funds).

- Among rail opponents, 57% do not believe that we will receive this money.

Gasoline Cost

At the outset of this section of the research respondents were asked if the rising cost of gasoline has affected their commute to work or school.

Rising Gas Prices – Affect Daily Commute	How has it changed? N=276
31%	64% Drive less 19% Bus 12% Carpool/ vanpool 8% Plan trips/ errands 5% Walk 5% Less disposable income

The research shows 31% of those polled have had their daily commute affected by the rising cost of gasoline.

Among this segment, 64% say they are driving less now while 19% say they have taken to using the bus more. Twelve percent are carpooling more while 8% say they are now planning their trips, combining errands to minimize the amount they are on the road.

At the conclusion of this section of the research those respondents who indicated their daily commute has not been affected by gasoline prices were asked at what price-point would gas prices have to rise to where it would begin to affect them.

MEAN (Average)	MEDIAN (Midpoint)	MIN ($5+)	MAX
$7.33	$6	$5	$50

Among this segment of the sample, gasoline prices would need to reach an average of $7.33 a gallon before it would affect their daily commute. The median is lower at $6 a gallon.

When the results are broken down by percentage we find an additional 11% of this segment would be affected by $5 a gallon price-point while another 10% say $6 is their threshold. For seven percent it is $7 a gallon while another 5% cite their breaking point at $8. Of the remainder, 11% cite a number higher than $8 while 46% say no amount is too high as they need to drive.

Sources of Information

In this section of the research respondents were presented with nine ways in which one might gather information on this particular topic. First they were asked if they used each source as a means of gathering information regarding rail transit and then they were asked to contrast the various sources choosing the one they felt was best or most important.

	SOURCE OF INFORMATION	BEST/ MOST IMPORTANT
Local TV news	83%	34%
Newspapers	76%	33%
Internet	37%	12%
Word-of-mouth	61%	8%
Radio	48%	6%
Community events	15%	2%
Direct mail	23%	1%
Council members	17%	1%
Neighborhood Board meetings	12%	1%
Other	6%	1%

The results show the top two sources of information regarding this particular project are local television news and local newspapers. This is true among both supporters and opponents of this project.

- The internet is a greater source of information among younger residents. For example, 20% of adults between the ages of 18 and 34 list the internet as the most important source of information regarding this project. As a point of comparison, just 7% of those 65 and over listed the internet as their most important source of information regarding rail transit.

PROFILE OF RESPONDENTS

	OVERALL	COMMENTS
REGISTERED VOTER	83%	Majority are registered to vote
AGE		
18-34	19%	The typical respondent is 49.47 years of age.
35-49	25%	
50-64	36%	
65+	16%	
MEAN	49.47	
PRIMARY RESIDENCE		
Own	66%	A third of the respondents polled are renters.
Rent	34%	
HOUSEHOLD SIZE		
1-2	40%	The typical respondent resides in a household of 3.56 persons.
3+	59%	
MEAN	3.56	
EDUCATION		
HS/ GED	22%	
Some College	23%	
Trade/JC/ Military	8%	
Four-year college grad	30%	
Post-graduate	16%	
LIVED OUTSIDE HI		
Yes	51%	Half the Oahu residents polled have at one point lived outside of Hawaii.
No	49%	
ETHNICITY		
Caucasian	30%	
Japanese	19%	
Hawaiian	18%	
Filipino	14%	
Other	20%	
HOUSEHOLD INCOME		
< $50K	26%	
$50K-$100K	30%	
$100K+	28%	
GENDER		
Male	50%	
Female	50%	