

**PROJECT PROFILE**

# SURVEY: Residents' Sentiments More Varied Towards Multimodal Transportation and Parking Fees

**SECTOR**

Transportation

**FOCUS AREA**

Multimodal Transportation

## EXECUTIVE SUMMARY

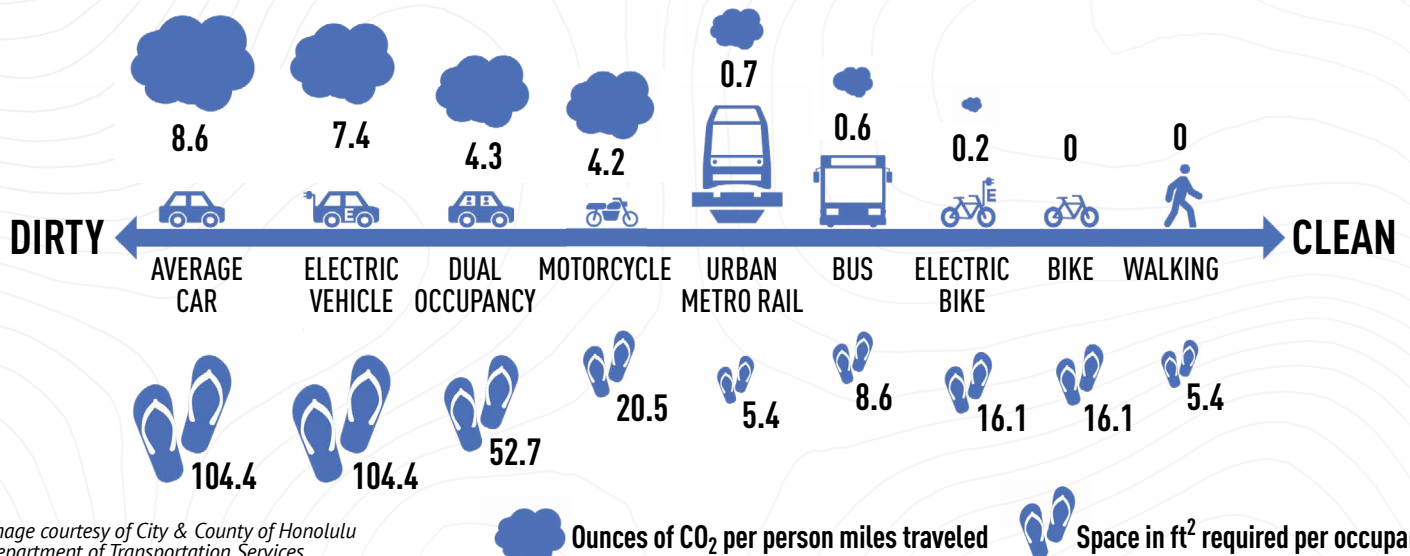
With its year-round tropical weather and relatively short distances between places, Hawai'i offers accessible and affordable multimodal transportation options to its residents and visitors. Sometimes, however, these options aren't enough to meet the needs of all residents all the time – sometimes they can take longer or don't run at the right time. It can also be true that once most people choose single-mode transportation, they are less likely to consider other forms of transportation even if these options are easier or significantly cheaper to utilize.

So often, we hear people say, "I could never give up my car," "I'll change only when rail starts up," or "multimodal travel only happens in Europe." In reality, more than 25% of Hawai'i's population already commute via active multimodal transportation choices, which include walking, rolling, public transit and carpooling. On O'ahu alone, there are more than 125,000 daily bus trips and more than 23,000 active bikeshare riders.

We wanted to know "Why is there such a disconnect between residents' desire to use multimodal transportation and actually going out and using them?" Below are Ulupono Initiative's insights and thoughts about Hawai'i's current transportation choices, as well as our research, making clear that public sentiments about multimodal clean transportation choices aren't as fixed as they are sometimes presented.

## WHAT IS MULTIMODAL TRANSPORTATION AND WHY IS IT IMPORTANT?

Multimodal transportation refers to a system in which various modes (walking, cycling, automobile, public transit, etc.) and connections among modes are available and accessible - providing a true set of transportation choices. However, not all choices have the same impacts. Below illustrates how some modes are much cleaner than others and take up significantly less space than others - a important consideration in a expensive island community.



## HAVING MORE CLEAN TRANSPORTATION CHOICES HELPS MANY FRIENDS AND FAMILY IMPROVE THEIR LIVES BY:

- ▶ **Reducing the costs of living on O’ahu.** Ulupono Initiative’s 2020 “Costs of the Vehicle Economy in Hawai’i” study outlines the significant direct and indirect costs of our current ground transportation system in our state. On average, households in Hawai’i are burdened by more than \$40,000 per year by our collective public and private vehicle dependency. If we can help our friends and families shed vehicles, they can save more than \$8,000 per year.<sup>1</sup>
- ▶ **Meeting our O’ahu’s climate and energy challenges ahead.** The 2015 Hawai’i Clean Energy Initiative Transportation Energy Analysis<sup>2</sup> outlined that more investment in active transportation is needed to meet our climate and clean energy goals. Combined with transit-oriented development, these types of commitments are anticipated to achieve 23 million gallons per year in energy savings, approximately 31-37% of the recommendations needed to achieve our goals in 2030 within the transportation sector.<sup>3</sup>
- ▶ **Helping improve the health of Hawai’i residents.** In Hawai’i, chronic diseases are among the most prevalent, costly, and preventable of all health problems, and they have progressively worsened over the past two decades. Sixty-four percent of adults in Hawai’i are living with at least one chronic condition (i.e., diabetes or heart disease), and chronic conditions are the top three causes of death in the state. Physical activity, such as walking and biking, are one of the main recommendations to help with these chronic health issues, and the Hawai’i State Department of Health is helping to provide a supportive built environment to make those options easier.<sup>4</sup>



## METHODOLOGY



With those scenarios in mind, Ulupono wanted to better understand how Hawai’i residents feel about these choices in their own lives. We surveyed residents and asked for their thoughts about using multimodal transportation and their willingness to pay a fee to park their vehicles. Our reasoning for asking residents about parking fees was that once parking is “free” or “included in the price,” it is not necessarily reflective of a true choice. “Free” parking isn’t necessarily free – people just pay for it through other means such as rents/mortgages or the cost of goods. Parking availability and price are the predictors of travel mode choice.

Ulupono’s survey of Hawai’i residents was commissioned through Anthology Research, a Hawai’i-based professional research firm. Since 2021, Anthology has conducted an online omnibus survey each year with a random sample of full-time residents ages 18 years and older. The first two of these surveys were conducted in July 2021 and 2022, and the third survey in February 2023. Each survey included approximately 500 residents for a total of about 1,500 Hawai’i residents sampled over the past few years. Ulupono will continue participating in these annual omnibus surveys to measure if sentiment changes over time.

# A CLEAN TRANSPORTATION LIFE

## ▶ SURVEY QUESTION #1

*Thinking of the future and your transportation needs, can you envision a life where you could meet all of your daily transportation needs through riding the bus, biking, using a scooter or skateboard, walking, and/or rideshare?*

### ✓ KEY TAKEAWAYS

- ▶ 50% or more of respondents indicated they were open to riding the bus, biking, using a scooter or skateboard, walking and/or rideshare – for their daily transportation needs.
- ▶ Respondents' willingness to use multimodal options varied by year (and time of year) by as much as a 16% difference—swinging from 53% in July 2022, to 66% in to July 2022, then to 50% in February 2023.

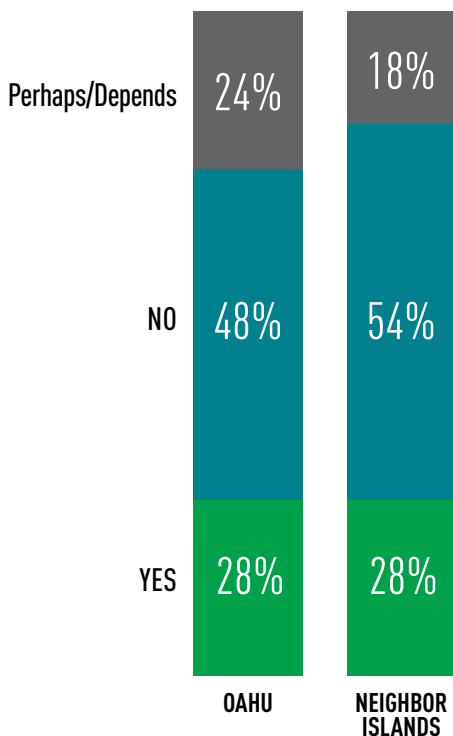


## ▶ SURVEY QUESTION #2

*About what percentage of your daily transportation needs could you envision meeting through using the bus, biking, rideshare, scooter/skateboard, and/or walking?*

### ✓ KEY TAKEAWAYS

- ▶ Among respondents who indicated they could envision themselves utilizing these transportation options, slightly more than a quarter (28%) indicated they would utilize them all the time.



When Hawai'i residents were asked if they could envision a life in which their daily transportation needs were met through riding the bus, biking, using a scooter or skateboard, walking and/or utilizing rideshare options, about half indicated they could. Even more impressive, more than one-in-four (28%) respondents indicated they not only envisioned such a lifestyle, but believed that 100% of their transportation needs could be met this way. These results affirm a resident openness to considering and utilizing more multimodal choices.

## A CLEAN TRANSPORTATION LIFE (CONTINUED)

### FACTORS

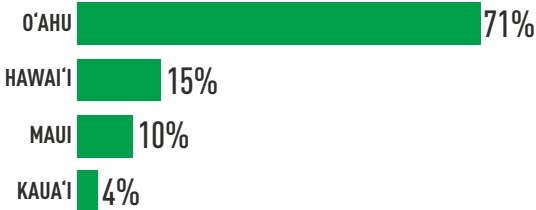
We did note a significant increase among those who answered positively to multimodal transportation options in the second year of our surveys. In 2022, the proportion increased by nine percentage points (27% in 2021 to 36% in 2022) but then fell eight points the next year (28% in 2023). These are our assumptions on what may have impacted the year-over-year changes:

**GAS PRICES.** There was significant variability in gas prices in 2022 as a result of the conflict between Ukraine and Russia that impacted global oil prices and supply.

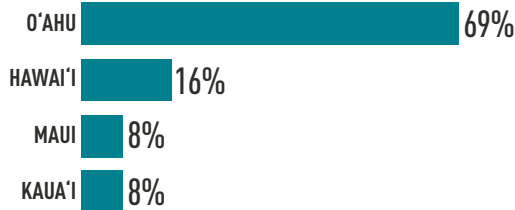
**TIME OF YEAR.** There was seasonal variability due to when school was in session.

Interestingly, Ulupono found no significant differences between survey results for O’ahu residents versus neighbor island residents. Considering the differences in neighbor island transportation infrastructure, this similarity in sentiment is extremely significant as it shows openness to multimodal transportation choices is not concentrated to one specific island or context within the state.

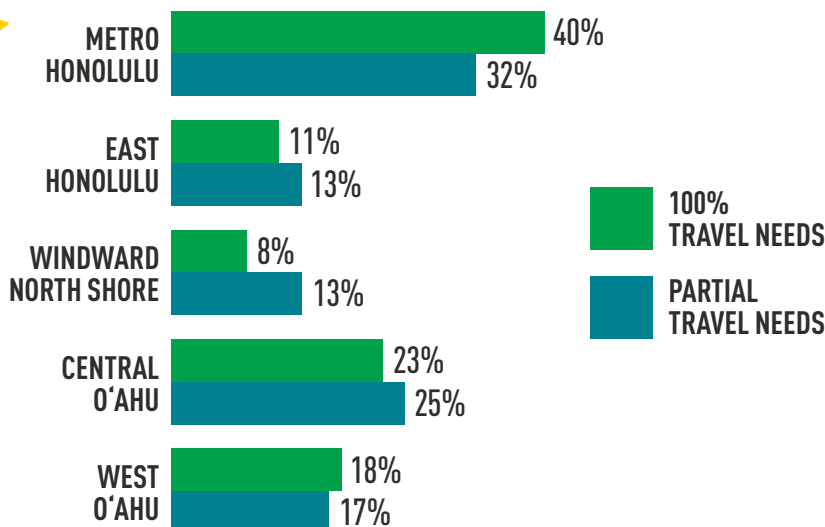
#### THOSE WHO WOULD USE SUSTAINABLE TRANSPORTATION FOR **ALL** OF THEIR TRAVELS



#### THOSE WHO WOULD USE SUSTAINABLE TRANSPORTATION FOR **SOME** OF THEIR TRAVELS



A further breakdown of O’ahu districts showed the majority of positive responses were of residents from Metro Honolulu:



WHO ARE THE  
**100%**  
SUPPORTERS?

VEHICLE OWNERSHIP  
**74%**  
currently own a vehicle

HOME OWNERSHIP  
**49%**  
are renters  
**41%**  
own their residence

### AGE

The majority (36%) were between 18-34 years old, while those 65 and older only made up 10%

# PARKING FEES FOR AFFORDABLE HOUSING

## ► SURVEY QUESTION #3

*If it meant Hawai'i would have more affordable housing and you would have more parking when/where you need it, in general, how willing would you be to pay a fee to park your vehicle?*

## ✓ KEY TAKEAWAYS

- 41% of respondents are very or somewhat willing to pay for parking

Question three asked respondents about their willingness to pay a parking fee if doing so benefited the construction of more affordable housing and parking availability when/where they needed it. Survey responses revealed, however, that when a benefit is called out, some residents are more willing to pay.



## 👉 FACTORS

**ISLAND.** The survey revealed a substantial difference between O'ahu and neighbor island resident sentiments with almost half (46%) of neighbor island respondents indicating they were very unwilling to pay for parking compared to 35% of O'ahu residents.



**AGE.** More than half (56%) of Hawai'i residents ages 18 to 34 were somewhat/very willing to pay for parking, while 26% of those ages 65+ years somewhat/very unwilling to do so.

**EMPLOYMENT STATUS.** Those with full/part-time employment showed a stronger willingness to pay the described parking fee versus the non-employed. About one-in-ten (12%) of employed respondents were very willing to pay for parking compared to 5% of those who were not working.



## HOW MUCH DOES PARKING REALLY COST US?

A single parking space can range from

**\$5,000 to \$57,000**

depending on the value of the land and type of structure

UP TO **\$140/unit**

added to monthly rent or mortgage payment based on scenarios in Urban Honolulu

**1 - 2%** OF GROSS SALES for the retail storeowners; it adds an extra week's worth of groceries to your overall food cost.<sup>5</sup>

# CONCLUSION

Openness among Hawai'i residents to accepting multimodal transportation choices and parking fees with benefits is substantial and prominent. Despite varying availability of multimodal transportation on all islands, similarities between O'ahu and neighbor island resident sentiments on these topics reveal a similar openness to the concepts. This suggests that these sentiments are not conditional on existing infrastructure but rather, the desire for a future that has sustainable and communal advantages.

With proven public support, a more sustainable transportation system has the potential to change the ever-increasing challenge of maintaining efficient transportation, living costs, affordable housing, and community connectedness.



<sup>1</sup> "Report Examines Hawaii's \$21.8 Billion Vehicle Economy." (Ulupono Initiative: 2021). <https://ulupono.com/news-listing/report-examines-hawaii-s-21-8-billion-vehicle-economy/>

<sup>2</sup> "Hawaii Clean Energy Initiative Transportation Energy Analysis." ( The International Council on Clean Transportation: 2015). [https://energy.hawaii.gov/wp-content/uploads/2011/09/Final\\_TransEnergyAnalysis\\_8.19.15.pdf](https://energy.hawaii.gov/wp-content/uploads/2011/09/Final_TransEnergyAnalysis_8.19.15.pdf)

<sup>3</sup> Ibid.

<sup>4</sup> "Hawai'i Physical Activity and Nutrition Plan 2030." (Hawai'i State Department of Health: 2021). <http://www.hhsp.hawaii.gov/>

<sup>5</sup> "Report Reveals the Hidden Costs of Parking in Hawaii." (Ulupono Initiative: 2020). <https://ulupono.com/news-listing/report-reveals-the-hidden-costs-of-parking-in-hawaii/>