

PROJECT PROFILE

SURVEY: Most Hawai'i Residents are Open to More Multimodal Transportation in the Future, But Speed Bumps Lie Ahead

SECTOR

Clean Transportation Choices

FOCUS AREA

Multimodal Transportation and Parking
Fall 2024

EXECUTIVE SUMMARY

With its year-round tropical weather and relatively short distances between places, Hawai'i seems to be the perfect location for residents and visitors to use accessible and affordable clean transportation choices, such as walking, rolling, catching public transit, and biking. This report shares key takeaways from Ulupono Initiative's annual survey of Hawai'i residents and our thoughts about the state's current transportation choices, making clear that public sentiments about clean transportation choices aren't as singular as they are sometimes presented. Almost 25% of Hawai'i's population already commute via clean transportation choices, which include walking, rolling, public transit and carpooling. On O'ahu alone, there are up to 130,000 average weekday transit trips and more than 17,000 active kama'aina bikeshare members, plus another 58,000 riders per year.

However, these options aren't enough to meet the needs of all residents – sometimes they can take longer or don't run at the right time. So often, we hear people say, "I could never give up my car," or "walking, biking or transit would never work for me and my family." It can also be true that once most people choose single-mode transportation, they are less likely to consider choices, even if these options are easier or significantly cheaper.

We wanted to know **"Why is there such a disconnect between residents' desire to use clean transportation choices and actually going out and using them?"** Over the past four years, we commissioned an annual survey of full-time Hawai'i residents through an online omnibus survey conducted by Anthology Research, a Hawai'i-based professional research firm. The survey reached approximately 400-500 people per year in all four counties.

UNDERSTANDING HAWAI'I'S CLEAN TRANSPORTATION CHOICES

Since 2009, Ulupono Initiative has been investing, educating and advocating in support of locally produced food, renewable energy, clean transportation choices, and freshwater systems in Hawai'i. We collaborate and partner with lawmakers, community stakeholders and industry representatives with the goal of helping our communities become more resilient and self-sufficient.

We support projects and policies that align with the state's goal to decarbonize the transportation sector by 2045 through greater transportation choices and electrification. The good news is that many of these clean transportation solutions are available now with a diverse selection of multimodal options. They are inexpensive and can be very convenient for many people to access.

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, accessible, and well-supported – providing a true set of transportation choices. However, not all choices have the same impacts. Below illustrates how some modes are much cleaner and take up significantly less space than others – an important consideration in an expensive island community that emit lower carbon emissions. When we provide these multimodal choices and encourage the most environmentally friendly ones, then we are providing real clean transportation choices..

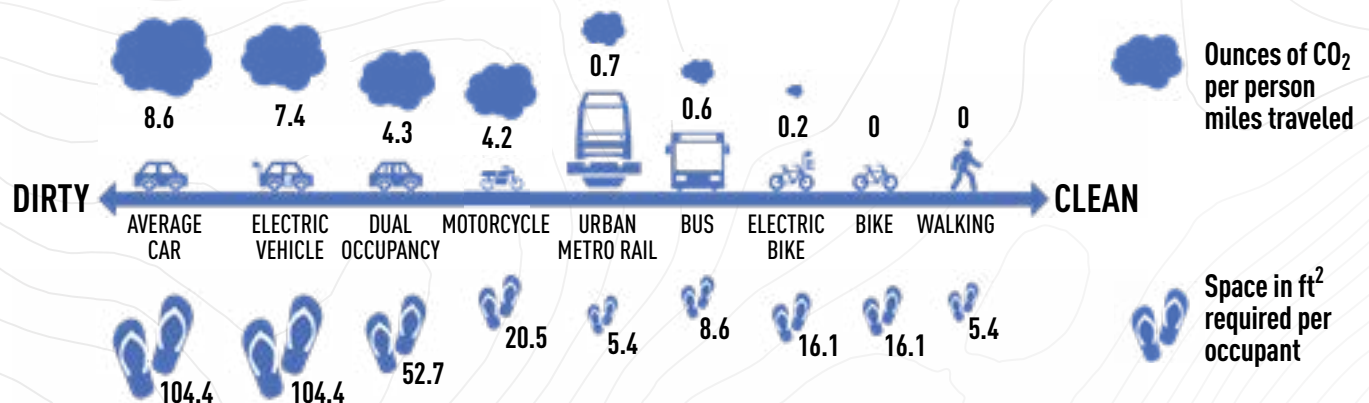


Image courtesy of City & County of Honolulu Department of Transportation Services

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



Reducing the costs of living. Ulupono Initiative's 2025 ["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 \$55,400 per year by our collective public and private vehicle dependency. This also means, a friend or family member can save \$36,000 on public and private costs by not owning a car.¹



Improving our health. In Hawai'i, chronic diseases are among the most prevalent, costly, and preventable of all health problems, and 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.²



Meeting our climate and energy challenges. The 2015 Hawai'i Clean Energy Initiative Transportation Energy Analysis³ 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.⁴

INCORPORATING CLEAN TRANSPORTATION CHOICES INTO DAILY 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

- ▶ **31%** believe their future transportation needs could someday be fulfilled by using the forms of transportation in the survey question.
- ▶ **46%** admit this is unlikely, while **24%** were unsure if this could be accomplished.
- ▶ Current vehicle-owners (**25%**) were statistically less likely to believe they can transition to 100% public or multimodal transportation options compared to those who do not currently own a vehicle (**57%**).

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

- ▶ A little more than one-third of respondents said they could envision at least half of their daily needs being met through one of the listed clean transportation choices.
- ▶ Among O'ahu residents, residents in urban Honolulu and Waikīkī indicated a higher potential use of clean transportation choices than residents who reside in other O'ahu regions.
- ▶ The potential use of clean transportation choices was also higher amongst renters than homeowners.

TRUE BELIEVERS

A bright spot was seeing that an average of 31% of respondents say they would choose clean transportation choices for 100% of their daily needs.

WHO ARE THE SUPPORTERS?

PLACE OF RESIDENCE

- 4% — Kaua'i
- 71% — O'ahu
- 14% — Maui County
- 10% — Hawai'i County



PROFILE CHARACTERISTICS

- 74% — Own a vehicle
- 47% — Own their home
- 56% — College graduate
- 57% — Born & raised in Hawai'i

INCORPORATING CLEAN TRANSPORTATION CHOICES INTO DAILY LIFE

(CONTINUED)



A possible street design showing how many people and modes of travel can thrive on a given city street, including many in Hawai‘i. (Source: Global Designing Cities Initiative)

TRENDS OVER TIME



Comparing survey results of the two transportation questions over the past four years, we have identified the following trends:

SURVEY QUESTION #3

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?

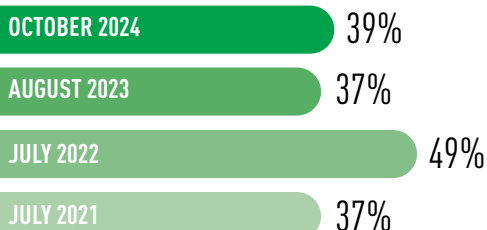
% of survey participants who say they would be open to choosing 100% clean transportation options in the future.



SURVEY QUESTION #4

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

% of survey participants who say they could envision using multimodal options 50-100% of the time.



- It is also important to note that in 2021, not all schools and workplaces had opened their facilities to in-person attendance, due to the COVID-19 pandemic.
- In 2022, there was a significant jump in pro-multimodal transportation options observed in both questions. However, just a year later in 2023, the results seemed to settle back to results similar to 2021.

WILLINGNESS TO PAY FOR PARKING

Along with asking for their thoughts about using clean transportation choices, the survey also asked participants about their willingness to pay a fee to park their vehicles. Our reasoning for asking the parking fee question 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, higher taxes, or the cost of goods. Parking availability and price are the predictors of travel mode choice.

► SURVEY QUESTION #5

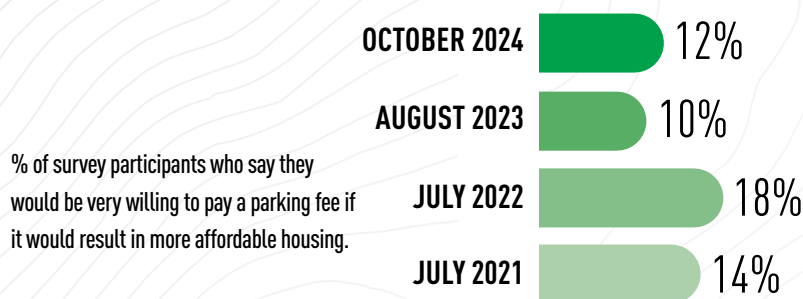
If it meant Hawai‘i would have more affordable housing and you would have more parking when/where you need it, in general, how willing would you be to pay a fee to park your vehicle?

✓ KEY TAKEAWAYS

- 46% of respondents are very or somewhat willing to pay for parking
- Survey responses revealed, however, that when a benefit is called out, some residents are even more willing to pay. In this case, the benefit used in the survey question was a parking fee and have more affordable housing.



TRENDS OVER TIME



- Females (58%) were statistically less willing to pay a parking fee than were males (42%).
 - Have a household income up to \$150,000/year were more willing to pay for parking in this scenario (39%).
 - Those who were born and raised in Hawai‘i were more likely to pay for parking in this scenario (66%).
 - Neighbor island residents (37%) were more likely to oppose paying a parking fee than O‘ahu residents (51%).



HOW MUCH DOES PARKING REALLY COST US IN HAWAI‘I?⁵

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.

CONCLUSION

Openness among Hawai'i residents to accepting clean transportation choices and parking fees with benefits is substantial and prominent. Despite varying availability of clean transportation choices on all islands, similarities between O'ahu and neighbor island resident sentiments on these topics reveal a common 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.



¹ "The Cost of the Vehicle Economy in Hawai'i." (Ulupono Initiative: 2025).
https://ulupono.com/media/m1kpvoxx/the-cost-of-the-vehicle-economy-in-hawaii_2025-4-11-final.pdf

² "Hawai'i Physical Activity and Nutrition Plan 2030." (Hawai'i State Department of Health: 2021).
<https://hhsp.hawaii.gov/program-area/9>

³ "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

⁴ Ibid.

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