



Beyond Research, Intelligence

Short-Term Rental Public Opinion Research

July 2024

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EXECUTIVE SUMMARY

SMS Research surveyed over 500 registered voters across the state of Hawai'i to learn more about their attitudes and opinions towards short-term rentals. The results of this public opinion research include the following:

- Short-term rentals are not a major concern for Hawai'i voters. Just 28% of voters believe short-term rentals are a “big” problem in Hawai'i.
 - Similarly among Maui voters, only 24% of Maui voters believe short-term rentals are a “big” problem.**
- The issues that are most top of mind for both Hawai'i and Maui voters are cost of living, homelessness, and political corruption. 75% of Hawai'i voters noted cost of living a “big problem,” followed by homelessness (67%) and political corruption (34%).
 - Similarly, 76% of Maui voters believe cost of living is a “big” problem, 56% believe homelessness is a “big” problem, and 40% believe political corruption is a “big” problem.**
- In terms of policy preferences, the vast majority of voters (73%) prefer a policy that would maintain **existing** legal short-term rentals and ban **illegal** rentals. Just 10% of voters want to ban all short-term rentals, while another 10% prefer no regulations at all.
 - Among Maui voters, 65% prefer a policy that is supportive of **legal** rentals and bans **illegal** rentals. Seventeen percent (17%) oppose any restrictions on short-term rentals, and 12% prefer banning all short-term rentals.**
- 60% of Hawai'i voters support allowing property owners to rent out their housing as short-term rentals.
 - 65% of Maui voters support allowing property owners to offer their housing as short-term rentals.**
- The top reasons for supporting short-term rentals include: It's their property to do as they wish (56%), They provide low-cost alternatives to hotels (54%), and Short-term rentals keep money in the hands of locals (51%).
 - Among Maui voters, the top reasons for support were: It's their property to do as they wish (65%), They provide low-cost alternatives to hotels (61%), and Short-term rentals keep money in the hands of locals (55%).**
- 77% of Hawai'i voters are concerned about State and County governments' ability to provide basic services if tax funding declines due to a drop in visitors.
 - 68% of Maui voters are concerned about State and County governments' ability to provide basic services if tax funding declines due to a drop in visitors.**

*** Maui survey results are derived from 57 voters and are likely to include more sampling error than larger sample sizes.*

INTRODUCTION

The Maui Vacation Rental Association (MVRA) represents owners of legal short-term rentals in Maui County and is interested in gaining insight into residents' views of short-term rentals. The association would like to better understand the extent to which the public supports or opposes short-term rentals, the public's experience with short-term rentals, and the public's preferences for policies regulating these types of rentals.

The following report addresses these questions. This report includes analysis of weighted survey data from adult voters across the state of Hawai'i. In addition, due to MVRA's interest in Maui voters' opinions, this analysis includes an examination of the responses of 57 Maui voters (a proportionate sample size for a statewide sample of 503 voters). Given the sample size, the Maui results are likely to include results that have slightly larger error bounds when compared to samples with a greater number of respondents. However, these results do provide a general sentiment of Maui voters' opinions on these topics, which in many cases is not dissimilar from the aggregated opinions of all voters in Hawai'i.

The results demonstrate the public is supportive of allowing property owners to offer their units as short-term rentals, due in part to the belief in property rights, but also because they believe these units offer benefits to visitors, residents, and the islands' economy. Data from this analysis also demonstrates that the public is concerned with changes that could negatively impact the local economy. The public demonstrates a preference for a policy that protects existing short-term rentals and enforces punitive actions on illegal short-term rentals, providing the public with reasoning to keep short-term rental laws unchanged.

PROJECT OBJECTIVES

The primary objectives of this research are to:

1. Quantify Hawai'i voters' experience and support or opposition to short-term rentals in Hawai'i, including reasons why.
2. Discern policy preferences with regard to short-term rentals.
3. Quantify the perception of how problematic short-term rentals are to voters.

METHODOLOGY

SURVEY, SAMPLE, AND WEIGHTING

The survey instrument was designed by professionals with SMS Research & Marketing Services, Inc. The questionnaire includes questions regarding experience with short-term rentals, support for short-term rentals (including reasons why), preferences for short-term rental policies, assessments of various impacts of the short-term rental market, and demographics. The survey was administered in an online format and the mean survey duration was nine minutes to complete.

SMS collected 503 completed surveys from Hawai'i residents (18 or older) who indicated they were registered voters. Residents of all counties were included in data collection activities. Fielding was conducted from May 23rd through May 26th, 2024. All data were reviewed and cleaned and open-ended responses were coded for quantitative analysis.

Weighting was applied to the analysis to adjust the results to be more in line with known characteristics of the population. The weighting methodology used in this research is iterative proportional fitting (raking). In this study we used U.S. Census data on Voting and Registration in the 2022 Elections for our population data. In particular, we weighted the data to distributions for age, gender, broad ethnic distribution, and county residence.

DATA ANALYSIS

The following portion of this report presents data analysis of the survey research that was conducted among Hawai'i voters broadly, and includes additional analysis of Maui voters. The findings are presented in three sections. First, we show the extent to which residents feel short-term rentals are a problem by comparing them to other community issues. We also discern residents' policy preference with regard to short-term rentals and quantify support and opposition to short-term rentals, which include the most prominent reasons for this support. Finally, we show Hawai'i residents' experience and awareness of short-term rentals in their communities. Where applicable, we note statistically significant results by various subgroups, and separately present county differences¹.

STR POLICY PREFERENCES

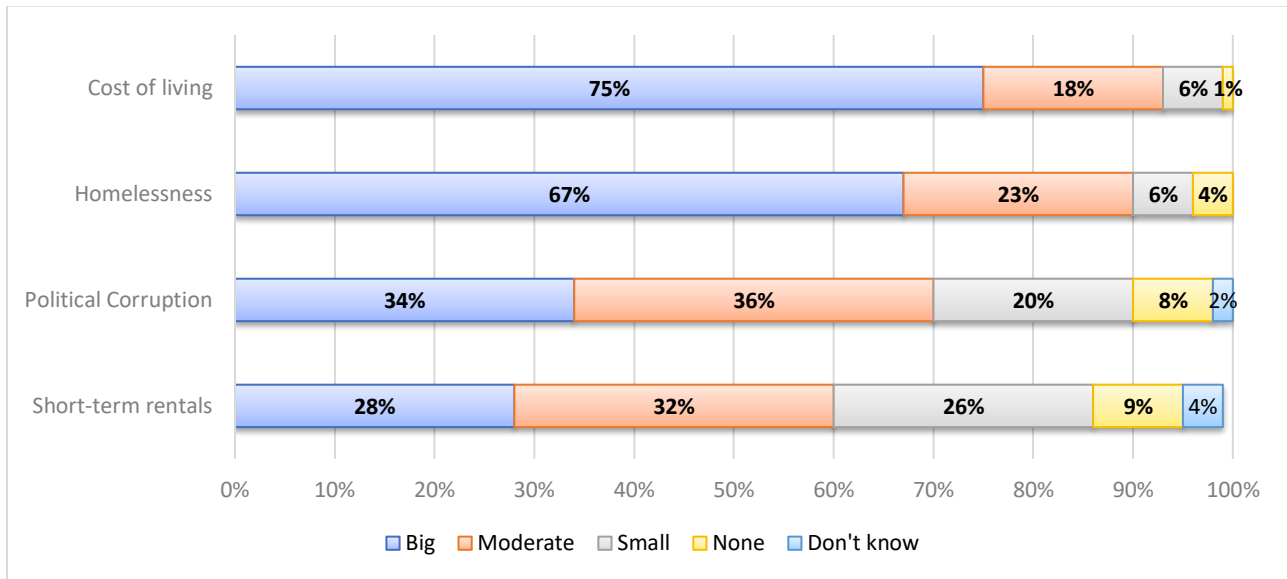
Most residents in Hawai'i and Maui are much more concerned with other issues compared to short-term rentals. Just 28 percent of respondents in Hawai'i, for example, indicated they believe short-term rentals are a "big" problem. In comparison, 75 percent of respondents in Hawai'i stated that cost of living was a "big" problem, 67 percent said homelessness was a "big" problem, and 34 percent believe political corruption is a "big" problem. Similarly, only 24 percent of Maui voters believe short-term rentals are a "big" problem. In contrast, 76 percent of Maui respondents state cost of living, 56 percent state homelessness, and 40 percent consider political corruption "big" problems.

There are a few key differences among segments that are worth noting. Thirty-five percent (35%) of Americans of Japanese Ancestry, 32 percent of Native Hawaiians, and 31 percent of Filipinos believe short-term rentals are a "big" problem, whereas 19 percent of Caucasians have that same assessment. In terms of geography, 33 percent of residents of Kaua'i, 29 percent of residents of Hawai'i Island, 28 percent of residents of O'ahu, and 24 percent of Maui residents feel short-term rentals are a "big" problem.

In terms of policy preferences for short-term rentals, most Hawai'i residents (73%) tend to have a nuanced approach that is supportive of short-term rentals that are legal, and another 10 percent oppose any type of restrictions on these units. In fact, just 10 percent of residents believe all short-term rentals should be banned. Among Maui voters, 65 percent support legal short-term rentals and want to ban illegal rentals, 17 percent oppose any restrictions, and 12 percent support banning all short-term rentals. There were no statistically significant differences by subgroups, due in part to the fact that there is overwhelming support for a policy that allows legal short-term rentals and bans those that are illegal.

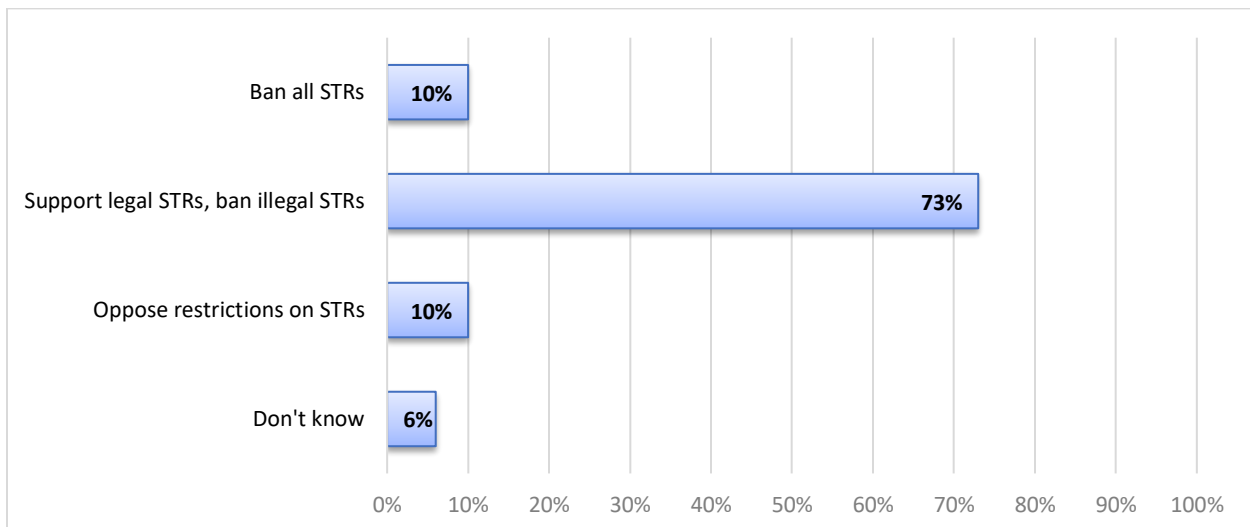
¹ This was a statewide survey that is proportional by county population, which means most respondents are residents of O'ahu. Although the sample sizes for neighbor counties are small and include greater error bounds around these estimates, we include the results from these counties to highlight differences and provide a "voice" to residents on these issues.

Figure 1: Magnitude of County Issues



Question: “Residents have expressed concerns about various problems in Hawai‘i. How much of a problem, if at all, do you think each of the following is on (your island)? Would you say a big problem, a moderate problem, a small problem, or not at all?”
n=503

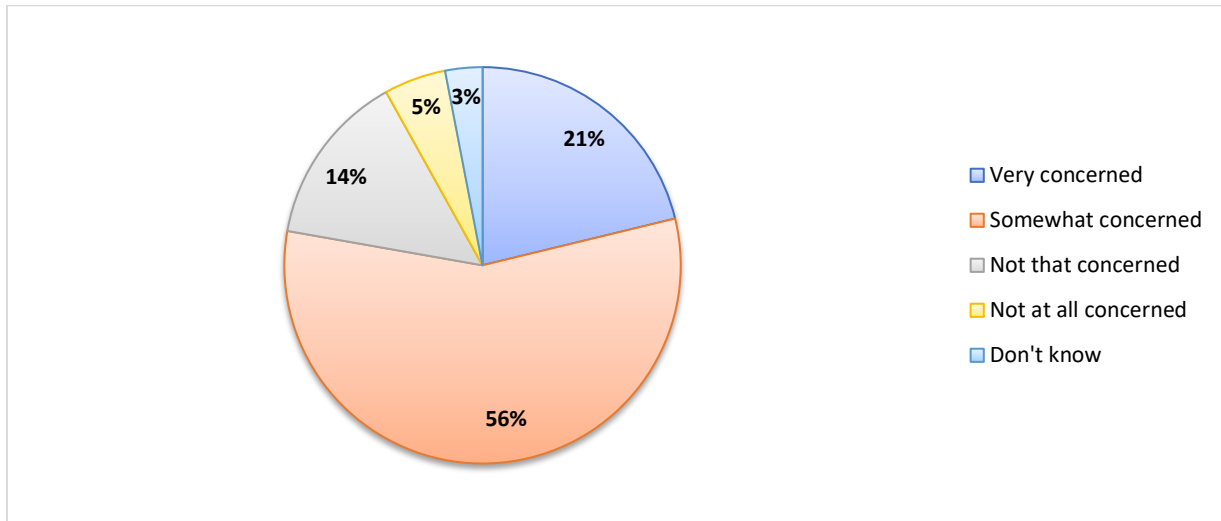
Figure 2: Policy Preference for STRs



Question: “Residents have different viewpoints about government policies regarding short-term rentals. Some people believe all short-term rentals should be banned, some people support legal short-term rentals and believe illegal rentals should be banned, and others feel there should be no restrictions at all on these types of properties. Which of these come closest to your view on policies towards short-term rentals?”
n=503

Respondents were asked about the impact a drop in visitors would have on State and County finances. Seventy-seven percent (77%) of respondents indicated they are very concerned or somewhat concerned about the governments' ability to fund services and programs in lieu of reductions in visitor arrivals. By contrast, 19 percent indicated they were not that concerned or not at all concerned about the ability to serve these core functions. Among Maui voters, 68 percent indicated they were concerned, 24 percent expressed little concern, and 8 percent didn't know how concerned they were about local government finances. There were no statistically significant differences in levels of concern by various subgroups.

Figure 3: Concerns about State and County Finances



Question: "Drops in visitors to Hawai'i have put pressure on State and County government finances in the past. Would you say that you are very concerned, somewhat concerned, not that concerned, or not at all concerned about State and County governments' current ability to fund services and programs?"
n=503

ATTITUDES TOWARDS STRS

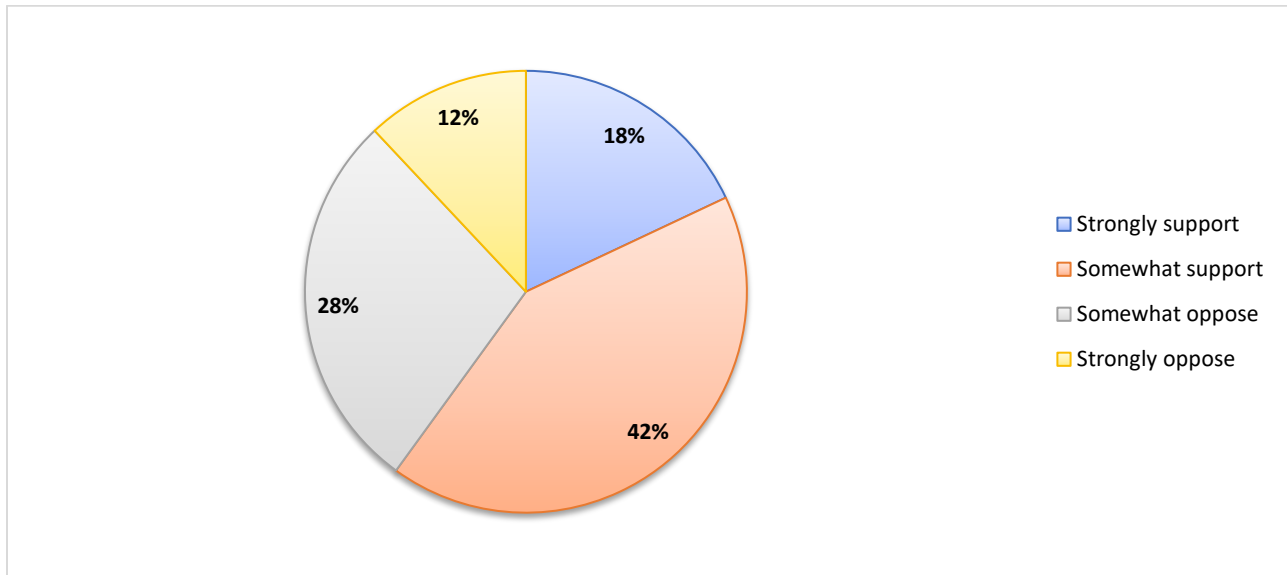
When asked about general support or opposition to short-term rentals, most respondents are in favor of allowing these types of accommodations. Sixty percent (60%) of respondents stated they either strongly support or somewhat support allowing property owners to rent out their housing units as short-term rentals. Sixty-five percent (65%) of Maui voters expressed support for short term rentals. Among the 34 percent who oppose, 25 percent "somewhat oppose" compared to 9 percent who "strongly oppose".

Support varied across several key factors. For example, 66 percent of respondents from Hawai'i Island, 65 percent of respondents from Maui, 59 percent of respondents from O'ahu, and 52 percent of respondents from Kaua'i support allowing property owners to use units as short-term rentals. Caucasians demonstrated the greatest support for the units (78%), followed by Filipinos (76%), Native Hawaiians (66%), and Americans of Japanese Ancestry (42%). Nearly three-quarters (74%) of residents who have experience with short-term rentals support allowing owners to offer these types of properties while 44 percent of those who don't have experience share the same sentiment. In terms of age, 74 percent of 18-34 year olds and 77 percent of 35-54 year olds support short-term rentals, compared to 42 percent of those 55 or older. Older residents appear to be less supportive of short-term rentals due to their lack of experience with these types of properties.

Those who support allowing property owners to rent their properties as short-term accommodations do so for a variety of reasons. Approximately 56 percent of supporters cite the belief that property owners should be able to do as they wish with their own properties. However, a nearly equal proportion (54%) of respondents also stated their support originates from the fact that short-term rentals provide lower cost alternatives to hotels, and 51 percent note that they support these rentals because locals receive economic benefits. Other reasons for support stem from the belief that these units offer more or a better selection of accommodations (especially when compared to hotels), these units generate state and local tax revenue, and they produce direct and indirect jobs for local residents.

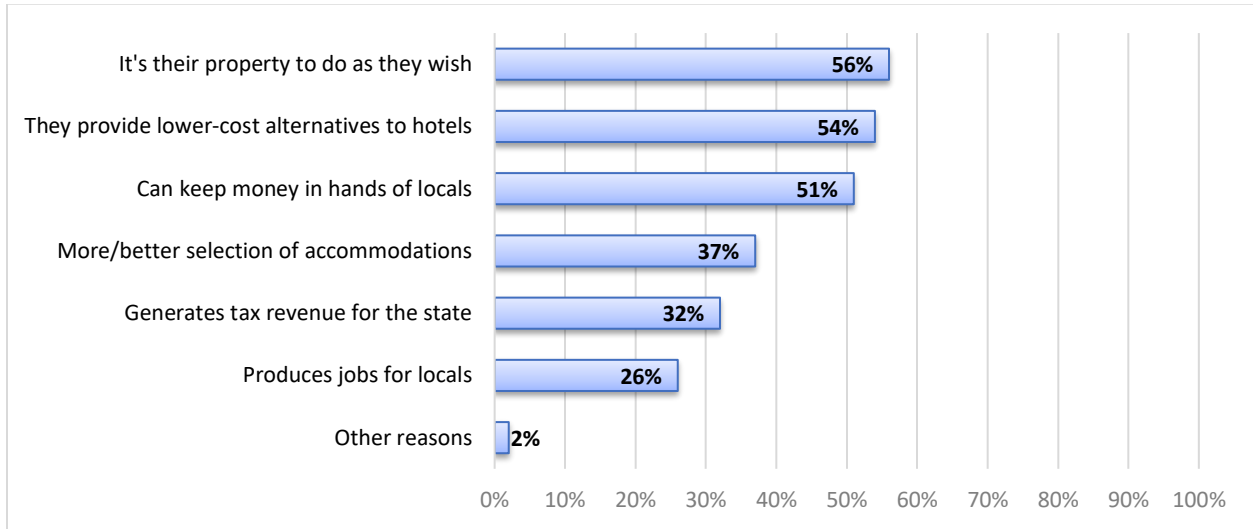
Supporters of short-term rentals on Maui provide similar reasons for their support. For example, 65 percent cite the ability of owners to do what they wish with their own property, 61 percent note the benefit of providing lower cost alternatives to hotels, and 55 percent state support is derived from the fact that short-term rentals keep money in the hands of local residents.

Figure 4: Support for STRs



Question: "Generally speaking, do you support or oppose allowing property owners to rent out their housing units as short-term rentals?"
n=503

Figure 5: Reasons for STR Support



Question: "Why do you say that?"
n=302

EXPERIENCE WITH STRS

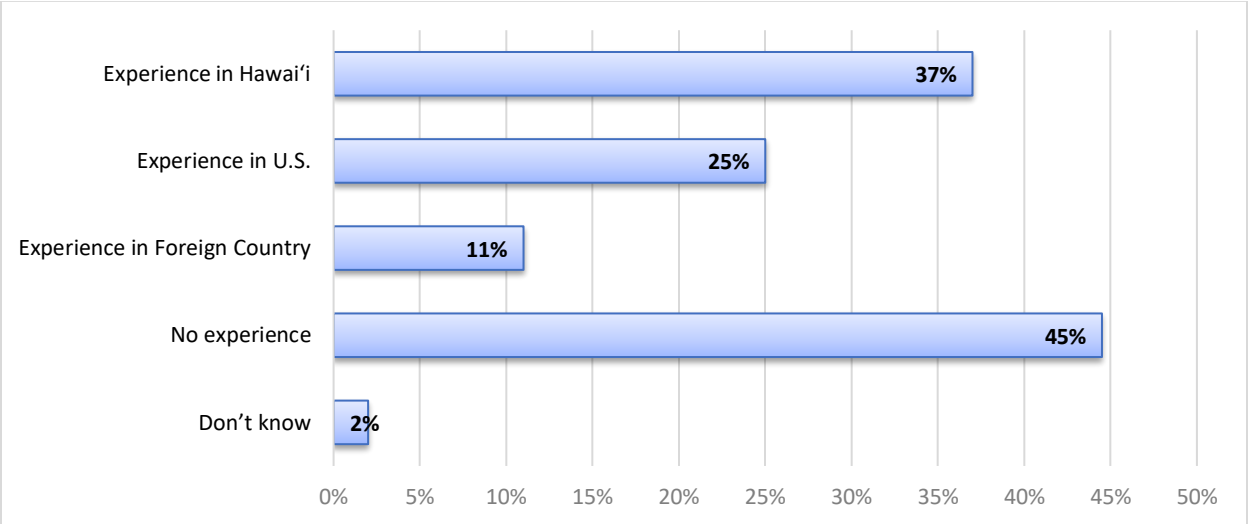
Survey respondents were asked about their experience with short-term rentals in Hawai'i, in other U.S. states, and in foreign countries. A majority of residents expressed experience with short-term rentals. Thirty-seven percent (37%) of respondents indicated they or a family member had experience with a short-term rental in Hawai'i, 25 percent indicated they or a family member stayed at a short-term rental in a state other than Hawai'i, and 11 percent indicated they used short-term rentals in a country outside the U.S. Just under half (45%) indicated they had never stayed in a short-term rental before. Among Maui voters, 43 percent of respondents or family members had experience with a short-term rental in Hawai'i, 21 percent had experience with a short-term rental in a state outside Hawai'i, and 12 percent had experience with a short-term rental outside the county. Forty-five percent (45%) stated they had no experience with short-term rentals.

Experience with short-term rentals was highest among younger and middle-aged residents (18-34 and 35-54), residents of Hawai'i Island, and Caucasians compared to other ethnicities.

When asked about short-term rentals operating in their neighborhoods, 40 percent of respondents indicated they were aware of these accommodations, 51 percent stated they were unaware, and nine percent didn't know if there were any short-term rentals operating in their neighborhoods. Among Maui voters, 56 percent indicated they were aware of a short-term rental in their neighborhood while 37 percent stated they were unaware.

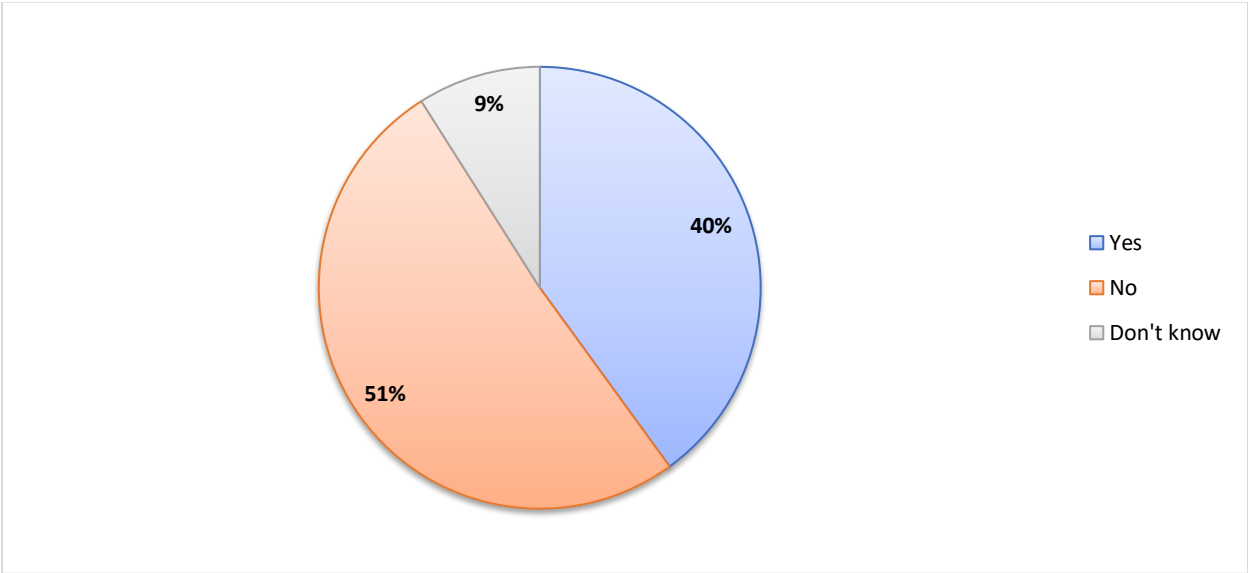
Awareness was higher among younger and middle-aged residents compared to those 55 or older, residents of neighbor islands compared to O'ahu, and Caucasians compared to other ethnicities.

Figure 6: Experience with STRs



Question: "Now, we'd like to know a little more about your thoughts on short-term rentals. First, what is your personal experience with short-term rentals? (Select all that apply)"
n=503

Figure 7: Awareness of STRs



Question: "Are you aware of any short-term rentals that operate in your neighborhood?"
n=503

APPENDIX

APPENDIX A: CROSSTABULATIONS

Table 1a: Assessment of the County

		Total	County				Age			Gender identity		Ethnicity				
		_	Oahu	Bl	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth
Let's begin with your thoughts about	Excellent	11	10	12	14	13	18	17	4	7	14	22	12	3	3	12
	Good	36	35	38	29	48	31	36	38	38	34	44	33	28	36	35
	Fair	38	42	29	33	21	34	31	45	39	38	27	34	49	48	39
	Poor	14	12	18	23	18	17	15	13	15	13	7	17	19	13	13
	Dont know	1	1	2				1	1	1	1		4			1
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 1b: Assessment of the County

		Total	Education			HH Income			Experience with STR		Support/Oppose	
		_	Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
Let's begin with your thoughts about	Excellent	11	13	8	11	7	13	13	4	17	16	4
	Good	36	33	37	40	30	36	41	33	38	40	30
	Fair	38	32	46	39	38	40	33	45	32	32	48
	Poor	14	19	9	10	23	9	12	17	12	12	18
	Dont know	1	2			2	1		1		1	1
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200

Table 2a: Magnitude of Problem: Homelessness

		Total	County				Age			Gender identity		Ethnicity				
		_	Oahu	Bl	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth
Homelessness: Residents have expressed	Big problem	67	70	59	56	77	65	56	76	65	69	45	77	75	81	68
	Moderate problem	23	21	28	29	16	24	26	21	24	22	28	20	22	16	24
	Small problem	6	6	9	9	2	9	10	3	6	6	16	4		3	6
	Not a problem	4	3	5	6	5	2	9	1	4	3	10		2		2
	Dont know											1				
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 2b: Magnitude of Problem: Homelessness

		Total	Education			HH Income			Experience with STR		Support/Oppose	
			Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
Homelessness: Residents have expressed	Big problem	67	67	65	72	69	70	59	76	59	59	79
	Moderate problem	23	24	25	18	26	19	26	21	25	27	16
	Small problem	6	6	6	7	4	6	9	2	9	8	3
	Not a problem	4	3	4	3	1	4	6	1	6	5	1
	Dont know				1							
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200

Table 3a: Magnitude of Problem: Short-term Rentals

		Total	County				Age			Gender identity		Ethnicity				
			Oahu	Bl	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth
Short-term rentals: Residents have expressed	Big problem	28	28	29	24	33	24	26	32	27	29	19	32	35	31	26
	Moderate problem	32	32	32	30	50	36	32	31	31	35	37	33	24	43	33
	Small problem	26	26	26	33	12	26	29	25	28	25	28	25	30	11	30
	Not a problem	9	9	12	9	5	12	11	7	10	9	14	3	9	9	10
	Dont know	4	5	2	3		1	3	6	4	3	2	7	3	7	1
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 3b: Magnitude of Problem: Short-term Rentals

		Total	Education			HH Income			Experience with STR		Support/Oppose	
			Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
Short-term rentals: Residents have expressed	Big problem	28	32	29	18	35	29	20	33	24	19	42
	Moderate problem	32	31	31	38	29	35	35	28	36	30	35
	Small problem	26	25	27	29	29	21	31	24	28	33	16
	Not a problem	9	9	10	10	5	10	12	8	11	13	4
	Dont know	4	3	3	5	2	5	2	7	1	4	3
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200

Table 4a: Magnitude of Problem: High Cost of Living/Inflation

		Total	County				Age			Gender identity		Ethnicity				
		_	Oahu	Bl	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth
High cost of living/inflation: Resident	Big problem	75	74	75	76	86	79	63	80	74	76	47	89	81	86	81
	Moderate problem	18	19	14	20	5	11	22	18	20	16	33	8	17	14	12
	Small problem	6	6	10	2	9	8	12	1	5	7	16	3	1		7
	Not a problem	1	1	1	3		1	3		1	1	5				
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 4b: Magnitude of Problem: High Cost of Living/Inflation

		Total	Education			HH Income			Experience with STR		Support/Oppose	
		_	Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
High cost of living/inflation: Resident	Big problem	75	75	72	78	82	74	67	83	67	70	81
	Moderate problem	18	16	23	15	15	19	22	15	20	20	15
	Small problem	6	8	5	6	3	7	9	1	11	9	2
	Not a problem	1	1	1	2		1	3		2	1	1
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200

Table 5a: Magnitude of Problem: Political Corruption

		Total	County				Age			Gender identity		Ethnicity				
		_	Oahu	Bl	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth
Political corruption: Residents have expressed	Big problem	34	34	24	40	46	37	33	33	32	35	28	40	34	41	35
	Moderate problem	36	39	28	32	18	30	36	38	38	34	33	33	39	32	38
	Small problem	20	20	26	13	32	24	18	20	20	21	25	18	20	20	18
	Not a problem	8	6	15	12	4	8	12	5	8	8	12	7	7		7
	Dont know	2	1	6	4		2	1	3	2	2	2	2	1	7	1
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 5b: Magnitude of Problem: Political Corruption

		Total	Education			HH Income			Experience with STR		Support/Oppose	
			Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
Political corruption: Residents have expressed	Big problem	34	39	29	31	39	34	30	35	33	34	35
	Moderate problem	36	33	39	39	31	39	37	37	35	35	38
	Small problem	20	19	23	20	22	18	21	20	21	21	19
	Not a problem	8	7	8	9	4	8	11	5	10	9	5
	Dont know	2	3	2	1	4	1	1	2	2	2	3
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200

Table 6a: Experience with Short-Term Rentals

		Total	County								Total	Age					
		Count	Oahu		BI		Maui		Kauai		Count	18-34		35-54		55+	
			Count	Col %	Count	Col %	Count	Col %	Count	Col %		Count	Col %	Count	Col %	Count	Col %
\$q12j	No experience with STRs	224	168	47.9%	18	25.1%	25	44.6%	13	50.5%	224	21	19.7%	38	24.2%	164	69.2%
	Experience in Hawaii	184	110	31.4%	39	56.3%	25	43.2%	9	37.7%	184	63	58.9%	85	53.5%	36	15.2%
	Experience in different US	125	89	25.4%	18	26.1%	12	21.4%	5	20.1%	125	33	31.1%	57	36.0%	34	14.4%
	Experience in Foreign	57	36	10.4%	10	14.9%	7	12.3%	3	11.1%	57	13	12.0%	30	19.1%	14	5.7%
	DK	9	9	2.5%	0	0.0%	0	0.0%	0	0.0%	9	0	0.0%	3	2.2%	5	2.3%

Table 6b: Experience with Short-Term Rentals

		Total	Gender identity				Total	Ethnicity									
		Count	Male		Female		Count	Cau		Hwn		Jap		Fil		Oth	
			Count	Col %	Count	Col %		Count	Col %	Count	Col %	Count	Col %	Count	Col %	Count	Col %
\$q12j	No experience with STRs	224	134	54.4%	90	35.6%	219	29	23.6%	41	48.8%	83	64.5%	15	37.5%	51	42.9%
	Experience in Hawaii	182	73	29.5%	110	43.4%	182	67	54.8%	32	38.7%	24	18.3%	22	52.8%	38	31.9%
	Experience in different US	123	45	18.1%	79	31.2%	123	47	39.0%	12	14.6%	22	17.1%	6	13.5%	36	30.5%
	Experience in Foreign	55	20	8.3%	35	13.7%	57	28	22.7%	3	3.6%	10	7.6%	3	6.7%	13	11.3%
	DK	9	6	2.3%	3	1.3%	7	1	.9%	2	2.1%	3	2.3%	0	0.0%	2	1.3%

Table 6c: Experience with Short-Term Rentals

	Total	Education							Total	HH Income						Total	STR Support/Oppose			
		Some college or less		College Degree		More than college degree		Less than \$50K		\$50-100K		\$100K+		Sup			Opp			
		Count	Col %	Count	Col %	Count	Col %	Count		Col %	Count	Col %	Count	Col %	Count		Col %	Count	Col %	
\$q12j	No experience with STRs	224	106	43.9%	84	49.3%	34	37.6%	207	67	47.9%	69	40.4%	71	41.9%	224	97	32.1%	127	63.3%
	Experience in Hawaii	184	94	38.8%	61	36.2%	29	31.4%	182	48	34.5%	72	41.5%	63	37.1%	184	139	46.0%	44	22.2%
	Experience in different US	123	47	19.3%	42	25.0%	34	37.9%	120	21	15.4%	48	27.7%	51	30.1%	125	89	29.3%	36	17.9%
	Experience in Foreign	57	26	10.8%	19	11.1%	12	12.7%	57	8	5.9%	22	12.9%	26	15.5%	57	40	13.3%	16	8.1%
	DK	9	5	2.1%	0	0.0%	4	4.1%	9	7	4.9%	1	.3%	1	.9%	9	5	1.7%	4	1.8%

Table 7a: Awareness of STRs in Neighborhood

	Total	County				Age			Gender identity		Ethnicity					
		Oahu	BI	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth	
Are you aware of any short-	Yes	40	32	62	56	62	58	54	23	33	48	67	37	21	41	34
	No	51	59	33	37	25	34	42	64	55	47	28	53	66	56	58
	Dont know	9	9	5	7	14	8	4	12	12	5	5	11	13	3	8
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 7b: Awareness of STRs in Neighborhood

	Total	Education			HH Income			Experience with STR		Support/Oppose		
		Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp	
Are you aware of any short-	Yes	40	42	36	43	33	46	45	22	56	47	30
	No	51	49	53	54	59	41	52	65	39	47	57
	Dont know	9	9	12	3	8	13	4	13	6	6	14
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200

Table 8a: STR Support/Opposition

	Total	County				Age			Gender identity		Ethnicity					
		Oahu	BI	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth	
General	Strongly support	18	18	15	23	20	22	29	9	17	19	25	19	14	23	14
ly speakin	Somewhat support	42	41	51	42	32	52	48	34	39	44	53	47	28	53	41
g, do	Somewhat oppose	28	31	19	25	27	19	17	40	32	25	16	24	39	21	33
you	Strongly oppose	12	11	15	9	20	7	5	18	12	12	5	11	19	3	12
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 8b: STR Support/Opposition

	Total	Education			HH Income			Experience with STR		Support/Oppose	
		Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
General											
ly speaking, do you											
Strongly support	18	18	16	22	12	19	23	11	24	30	
Somewhat support	42	48	37	36	43	44	41	33	50	70	
Somewhat oppose	28	24	35	28	30	25	27	38	20		71
Strongly oppose	12	10	12	14	15	13	8	18	6		29
Total # Respondents (WTD)	503	242	169	91	139	172	170	233	270	303	200

Table 9a: Reasons for Short-Term Rental Support

	Total	County								Total	Age					
		Oahu		BI		Maui		Kauai			18-34		35-54		55+	
		Count	Col %	Count	Col %	Count	Col %	Count	Col %		Count	Col %	Count	Col %	Count	Col %
Its their property to do as	161	109	55.0%	24	56.8%	23	64.9%	6	49.7%	161	43	57.3%	62	52.9%	57	59.6%
They provide lower-cost	154	105	52.8%	23	53.9%	21	60.8%	5	48.4%	154	40	54.5%	71	60.5%	43	44.9%
Can keep money in hands	147	100	50.5%	21	49.0%	19	54.9%	7	62.1%	147	33	43.9%	61	51.8%	54	56.4%
More/better selection of	105	78	39.1%	18	42.8%	7	19.5%	3	24.9%	105	33	44.7%	57	48.2%	15	16.2%
Generates tax revenue for	93	69	35.0%	12	28.7%	10	27.4%	2	16.5%	93	20	26.7%	30	25.6%	43	45.5%
Produces jobs for locals	76	60	30.3%	9	21.8%	5	15.3%	1	10.1%	76	19	25.0%	44	37.2%	13	14.1%
Other reasons	6	3	1.4%	0	0.0%	3	9.5%	0	0.0%	6	3	3.8%	1	1.2%	2	1.9%

Table 9b: Reasons for Short-Term Rental Support

	Total	Gender identity				Total	Ethnicity									
		Male		Female			Cau		Hwn		Jap		Fil		Oth	
		Count	Col %	Count	Col %		Count	Col %	Count	Col %	Count	Col %	Count	Col %	Count	Col %
Its their property to do as	160	76	57.7%	84	55.7%	160	40	42.8%	33	63.1%	28	58.6%	20	67.4%	39	62.9%
They provide lower-cost	152	72	54.4%	80	53.0%	153	57	60.7%	25	47.8%	19	39.8%	16	55.0%	36	57.8%
Can keep money in hands	146	64	48.4%	82	54.2%	147	43	46.3%	29	56.2%	28	57.7%	19	65.4%	28	44.0%
More/better selection of	104	42	32.1%	61	40.8%	105	51	54.6%	11	20.7%	13	27.4%	12	42.3%	18	28.5%
Generates tax revenue for	92	53	40.3%	39	25.7%	92	37	39.6%	14	26.8%	12	24.1%	4	14.6%	25	40.0%
Produces jobs for locals	76	39	29.2%	37	24.6%	76	31	33.1%	8	15.9%	13	27.4%	7	22.5%	17	26.7%
Other reasons	6	6	4.6%	0	0.0%	6	0	0.0%	2	3.6%	3	5.7%	0	0.0%	1	2.4%

Table 9c: Reasons for Short-Term Rental Support

	Total Count	Education						Total Count	HH Income						Total Count	Experience with STR			
		Some college or less		College Degree		More than college degree			Less than \$50K		\$50-100K		\$100K+			No experience		Some experience	
		Count	Col %	Count	Col %	Count	Col %		Count	Col %	Count	Col %	Count	Col %		Count	Col %	Count	Col %
Its their property to do as	160	69	46.7%	58	67.6%	33	63.4%	156	38	54.5%	59	58.2%	60	55.1%	161	59	63.2%	103	52.9%
They provide lower-cost	153	72	49.1%	57	66.3%	24	45.3%	151	32	46.5%	57	56.1%	62	56.8%	154	44	47.4%	110	56.8%
Can keep money in hands	147	64	43.6%	53	61.8%	30	56.7%	145	34	49.2%	58	57.0%	53	48.8%	147	52	56.6%	95	48.8%
More/better selection of	105	55	37.6%	32	37.2%	18	34.4%	103	18	26.2%	42	42.1%	42	38.8%	105	20	21.8%	85	43.9%
Generates tax revenue for	92	40	26.9%	38	44.6%	14	26.5%	86	14	20.3%	35	34.4%	38	34.5%	93	34	36.9%	59	30.3%
Produces jobs for locals	76	35	23.7%	28	32.9%	12	24.0%	76	16	23.0%	32	31.5%	28	25.8%	76	15	16.2%	61	31.3%
Other reasons	6	0	0.0%	5	5.4%	1	2.8%	6	0	0.0%	0	0.0%	6	5.6%	6	5	5.0%	1	.8%

Table 10a: Preferred Policy Towards STRs

	Total _	County				Age			Gender identity		Ethnicity									
		Oahu	BI	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth					
Residents have different viewpoints																				
Ban all short-term rentals	10	10	14	12	7	8	8	13	13	7	7	11	9	7	10					
Support legal rentals, ban	73	76	69	65	72	72	73	74	71	75	79	71	76	69	71					
Oppose restrictions on	10	10	9	17	8	12	16	6	9	12	10	11	9	10	12					
Dont know	6	5	8	7	13	8	3	7	7	5	4	7	5	14	6					
Total # Respondents (WTD)	502	351	70	56	25	107	159	237	246	252	121	83	129	41	119					

Table 10b: Preferred Policy Towards STRs

	Total _	Education			HH Income			Experience with STR		Support/Oppose		
		Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp	
Residents have different viewpoints												
Ban all short-term rentals	10	11	10	9	11	10	10	13	8		26	
Support legal rentals, ban	73	68	79	79	68	71	79	69	77	76	70	
Oppose restrictions on	10	12	8	11	11	14	7	9	12	17		
Dont know	6	9	4	1	10	5	3	10	3	7	4	
Total # Respondents (WTD)	502	241	169	91	139	171	170	233	270	302	200	

Table 11a: Concern about State and County Govt Finances

		Total	County				Age			Gender identity		Ethnicity				
		_	Oahu	Bl	Maui	Kauai	18-34	35-54	55+	Male	Female	Cau	Hwn	Jap	Fil	Oth
Drops in visitors to Hawai'i have	Very concerned	21	21	15	28	27	18	19	23	25	17	21	27	20	23	18
	Somewhat concerned	56	58	60	40	57	62	63	49	47	65	59	51	53	63	58
	Not that concerned	14	14	18	13	8	12	10	19	19	11	15	11	17	8	16
	Not at all concerned	5	5	2	11	2	4	6	5	6	4	4	11	4	3	3
	Dont know	3	2	6	8	6	4	3	4	3	3	1		6	3	5
Total # Respondents (WTD)		503	351	70	57	25	107	159	238	246	253	122	83	129	41	119

Table 11b: Concern about State and County Govt Finances

		Total	Education			HH Income			Experience with STR		Support/Oppose	
		_	Some college or less	College Degree	More than college degree	Less than \$50K	\$50-100K	\$100K+	No experience	Some experience	Sup	Opp
Drops in visitors to Hawai'i have	Very concerned	21	18	21	27	21	20	23	22	20	20	22
	Somewhat concerned	56	61	51	53	54	60	53	50	61	60	50
	Not that concerned	14	11	21	10	19	13	12	15	14	13	17
	Not at all concerned	5	5	4	7	5	3	7	7	4	4	6
	Dont know	3	4	3	2	1	4	5	6	1	2	6
Total # Respondents (WTD)		503	242	169	91	139	172	170	233	270	303	200