AH-1(1)

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WEST MAUI WORKFORCE HOUSING SURVEY

Preliminary Analysis

- We have received 321 completed surveys to date (in 7 weeks).
- 56% are employed in the Visitor Industry, a representative number. 14% in the public sector (teachers, fire, police, local government etc., also representative)
- Almost two-thirds of respondents have lived on Maui at least 15 years (19% are lifetime residents)
- 41% live in a multiple-generation home
- As many as 25% of those surveyed are considering a move to the Mainland – which has serious implications for our economy and the visitor industry in particular. 75% of these specifically cite lack of affordable housing as a reason
- 54% of respondents rent, 34% are home owners, and 10% live with family
- 63% of all respondents have a Household income that falls below the 100% of HUD median income threshold of $81,400. 44% of all respondents fall below the 80% median household income threshold of $65,120.
- A recent study, the ALICE report published by Hawaii United Way, estimates that 52% of Maui households are living paycheck to paycheck.
- 80% of renters surveyed pay less than $2,000 per month in rent.
- Latest Realtor Association of Maui data show that the median price of a single family home on the West Side is $850,000. With 20% down ($170,000), a mortgage would cost almost $4,000 per month. This shows the affordability gap
- 46% of home owners report a mortgage payment of more than $2,000 per month (30% or more of household AMI)
- 83% of respondents who currently rent reported that if affordable homes were available, they would like to buy one
- 62% of all respondents say they would be willing to attend a County Council meeting to show support for affordable workforce housing

RECEIVED AT AH MEETING ON 6/19/19
Lori Sablas

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WEST MAUI WORKFORCE HOUSING SURVEY

Question 1: What industry are you employed in?

N = 321

56%	Visitor Industry: Hotels, Resorts, Lodging, Restaurants & Retail
14%	Public Sector (Teachers, police, fire, etc.)
5%	Non-profit sector
4%	Financial, Real Estate
3%	Construction
18%	Other

Question 2: Commute to Work:

N = 321

82%	Car
4%	Car Pool
7%	Don't commute
2.5%	Employer transportation

Question 3: Commute From:

N = 311

75%	West Side
16%	Central Maui
4%	South Maui
3%	Upcountry
2%	Other (North shore, East Maui, Lanai)

Question 4: Outbound Commute (From West Maui)

N = 40

Main destinations: Central (22) and South (9)

Question 5: How long have you lived at your current address:

N = 314

< 1 year	11%
1-5 years	33%
5-10 years	22%
10+ years	34%

Question 7: Current Living Situation:

N = 315

Rent	54%
Own	34%
Live with Family	10%
Other	2%

Question 8: Renters: Monthly Rental Rate:

N = 167

<$1,000	17%
$1,000 - $1,500	37%
$1,500 - $2,000	26%
$2,000 - $3,000	18%
> $3,000	2%

Question 9: Renters: Type of Rented Space

N = 166

Single Family home	19%
Ohana (attached)	31%
Ohana (detached)	14%
Condo	14%
Room in a home	12%
Other	10%

Question 10: Renters: Does anyone in your household receive rental housing assistance?

N = 167

No:	91%
Yes, Public Housing	2%
Section 8	2%
Don't know/Other	5%

Question 11: Renters: Have you ever owned a house or condo?

N = 166

Yes:	19%
No:	81%

Question 12: Renters: Which Living Situation do you prefer?

N = 167

Affordable Rental:	25%
Affordable Home Ownership:	68%
Don't Know:	7%

Question 13: Renters: If affordable homes were available, would you want to buy one?

N = 165

Yes:	83%
No:	7%
Don't Know:	10%

Question 14: Owners: Type of Ownership

N = 103

Single Family Home	70%
Condo:	26%
Other:	4%

Question 15: Owners: Mortgage Range

N = 103

No mortgage	17%
<$1,000	1%
$1,000 - $1,500	12%
$1,500 - $2,000	24%
$2,000 - $3,000	30%
>$3,000	16%

Question 17: Are you interested in attending educational seminars?

N = 229

Yes, For First-time Buyers	52%
Yes, Financial advice on saving for a home purchase	48%
Yes, Educational home-buying seminar	50%
No	27%

Question 18: If you are looking to purchase a house, what type of single family home?

N = 235 (Note: some respondents selected more than one category)

1 to 2 bedroom	36%
3 to 4 bedroom	56%
5 + bedroom	3%
Not currently looking or N/A	19%

Question 19: Current Annual Household Income

N = 232

<$65,120 (Up to 80% AMI)	44%
$65,121 to $81,400 (80% to 100% AMI)	19%
$81,401 to $97,680 (100% to 120% AMI)	15%
$97,681 to $113,960 (120% to 140% AMI)	7%
More than $113,960 (140%+ AMI)	11%
Decline to answer	4%

Question 20: Born and/or raised in Hawaii?

N = 304

Yes	38%
No	62%

Question 21: What Hawaiian Island were you raised on?

N = 118

Maui	74%
Oahu	18%
Hawaii	3%
Molokai	2%
Lanai	2%
Kauai	1%

Question 22: How long have you lived in Maui County?

N = 302

Lifetime	19%
25+ years	22%
15 to 25 years	22%
5 to 14 years	24%
1 to 4 years	11%
Less than 1 year	2%

Question 23: Are there multiple generations living in your home?

N = 300

Yes	41%
No	59%

Question 25: Are you considering a move to the Mainland?

N = 302

Yes	25%
No	75%

Question 26: Why are you considering a move to the Mainland?

N = 74 (Note: some respondents selected more than one category)

Cost of living	77%
Lack of affordable housing	75%
Work-related opportunities	24%
Family	4%
Other	12%

Question 27: Would you be willing to attend a County Council meeting to show support for a workforce housing project?

N = 299

Yes	62%
No	8%
Not at this time	31%

Question 28: When would you be able to attend a County Council meeting?

N = 187 (Note: some respondents selected more than one category)

Evening	75%
Morning	34%
Afternoon	29%

Question 29: Where would you be able to attend a County Council meeting?

N = 188 (Note: some respondents selected more than one category)

West Maui	80%
Central Maui	37%
South Maui	12%
Upcountry Maui	8%

Question 30: Would you be willing to submit written testimony to show support for a workforce housing project?

N = 300

Yes	61%
No	6%
Not at this time	33%

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WEST MAUI WORKFORCE HOUSING SURVEY

INTENTIONS OF THE SURVEY

Aloha, Thank you for participating in our anonymous survey regarding workforce housing in West Maui.

Our main goal is to discover and determine the need for housing in West Maui from "the bottom up" as opposed to "top down." We would like to provide actual feedback from the workforce to the decision makers on the county government level as well as to private real-estate development companies.

There were many hands in developing this survey, each one just as excited as the next. The questions within this survey are all related to primary industries on Maui, the need to provide workforce and live-able homes for those working within these industries, and the access to address this need for our local community.

The data gained will be used at the county level for decision making purposes.

This survey is completely anonymous.

Questions regarding this survey may be directed to WMSurvey@medb.org.

SECTION A: Industry and Demographic Representation

This section of questions is to determine the majority employment industry and location information of all participants taking this survey.

#1: What industry are you currently employed in?

- ☐ Hotels/Resorts/Lodging
- ☐ Restaurants
- ☐ Retails
- ☐ Public Service/Government (incl. teachers, firefighters, police, etc.)
- ☐ Non-Profit
- ☐ Health Care
- ☐ Construction
- ☐ Financial & Real Estate
- ☐ Not Employed
- ☐ Other (please specify): _____

#2: How do you currently commute to your primary place of employment?

- ☐ Public Transportation
- ☐ Employer Provided Transportation (incl. Commuter Bus)
- ☐ My Car
- ☐ Car Pool
- ☐ I don't commute
- ☐ Other (please specify): _____

#3: If you commute to West Maui for work, where do you commute from?

- ☐ West Maui
- ☐ Central Maui
- ☐ UpCountry
- ☐ North Shore & East Side
- ☐ South Side
- ☐ Lanai
- ☐ Molokai
- ☐ Not applicable

#4: If you commute from West Maui for work, where do you commute to?

- ☐ West Maui
- ☐ Central Maui
- ☐ UpCountry
- ☐ North Shore & East Side
- ☐ South Side
- ☐ Lanai
- ☐ Molokai
- ☐ Not applicable

SECTION B: Housing

This next section of questions relates to your CURRENT housing. From these questions we hope to gain a general sense of how our Maui community is living. We'd like to know if there is interest in owning your own home as an investment in the future.

Some questions are asking personal information. As a reminder this survey is completely anonymous.

#5: How long have you lived at your current address?

- ○ Less than 1 year
- ○ 1 - 5 years
- ○ 5 - 10 years
- ○ 10+ years

#6: What is your zip code? _____

PLEASE CONTINUE TO PAGE 2

Maui Economic Development Board, Inc. (MEDB) is a 501(c)(3) nonprofit corporation dedicated to leading and inspiring innovation in business, education and our community. We envision lives fulfilled in a vibrant economy and we serve as a convener of community voices. Participation in this survey is voluntary and anonymous. The quantitative results will be made available to the public and will be presented as a tool for Maui's community and county leaders to aid discussions and decisions on the issue of workforce housing.

SECTION B: Housing (continued from Page 1)

#7: What is your current living situation?

- O Rent (if selected, skip to **Section C**)
- O Own (if selected, skip to **Section D**)
- O Live with family (if selected, skip to **Section E**)
- O Currently, I do not have a home (if selected, skip to **Section E**)
- O My home is my vehicle (if selected, skip to **Section E**)
- O **Other (please specify):** (if selected, skip to **Section E**)

SECTION C: Currently Renting

Please complete this section IF you answered "Rent" for Question # 7.

#8: What is your current monthly rental range?

- O Under $1,000
- O $1,000 - $1,500
- O $1,500 - $2,000
- O $2,000 - $3,000
- O Above $3,000

#9: The space you are currently renting is:

- O A single-family home/entire house
- O Attached Ohana/Cottage/Apartment
- O Detached Ohana/Cottage/Apartment
- O Condo
- O A room in a home
- O **Other (please specify):**

#10: Do you or someone in your household currently receive any of these types of rental housing assistance?

- O No, none
- O Public Housing
- O Section 8
- O Rapid Rehousing or Housing First
- O **Assistance from religious or non-profit agency**
- O Don't know
- O **Other (please specify):**

#11: Have you ever owned a home or condo?

- O Yes
- O No

#12: Which living situation do you prefer?

- O Affordable renting
- O Affordable homeownership
- O Don't know

#13: If there were currently homes available that you could afford, would you want to buy one?

- O Yes
- O No
- O Don't know

PLEASE CONTINUE TO SECTION E ON PAGE 3

SECTION D: Currently Own Home

Please complete this section IF you answered "Own" for Question # 7.

#14: The space you currently own is:

- O A single-family home/entire house
- O Detached Ohana/Cottage/Apartment
- O A condo
- O **Other (please specify):**

#15: What is your current monthly mortgage rate?

- O There is no mortgage
- O Under $1,000
- O $1,000 - $1,500
- O $1,500 - $2,000
- O $2,000 - $3,000
- O Above $3,000

#16: To be able to purchase workforce housing, you would be unable to have owned a home or condominium within the past three (3) years. Would you be willing to sell your current home or condo, and wait three (3) years, for an opportunity to own a home in a workforce housing community in West Maui?

- O Yes (if selected, skip to **Section E**)
- O No (if selected, skip to **Section F**)
- O I would need more information (if selected, skip to **Section E**)

PLEASE CONTINUE TO SECTION E ON PAGE 3

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SECTION E: Interest in Purchasing a Home

#17: If there were educational seminars offered to help you qualify for home ownership, would you be interested in taking advantage of them? ** Please check all that apply

- ☐ I'd be interested in a first-time home buyers seminar
- ☐ I'd be interested in a financial seminar with tips on how to save for a home purchase
- ☐ I'd be interested in an educational home buying seminar
- ☐ No

#18: If you are looking to purchase a house, what type of single-family home are you interested in?

- ☐ 1 - 2 bedrooms
- ☐ 3 - 4 bedrooms
- ☐ 5+ bedrooms
- ☐ Not currently looking to purchase a house, or not applicable

#19: What is your current annual household income range?

- ☐ Below or equal to $65,120 annual
- ☐ $65,122 - $81,400
- ☐ $81,401 - $97,680
- ☐ $97,681 - $113,960
- ☐ $113,961+

SECTION F: Connections and Resources on the Island of Maui

This next section of questions relates to your connections and resources on island. We are looking to establish an association between those currently living on island and the interest and need for owning your own home.

#20: Were you born and/or raised in the state of Hawaii?

- ○ Yes
- ○ No (if selected, skip to **Question #22**)

#21: If you answered "yes" to the previous question, what island were you primarily raised on?

- ○ Maui
- ○ Molokai
- ○ Lanai
- ○ Hawaii Island
- ○ Oahu
- ○ Kauai
- ○ Niihau

#22: How long have you lived in Maui County?

- ○ Less than one year
- ○ 1 - 4 years
- ○ 5 - 14 years
- ○ 15 - 25 years
- ○ Over 25 years
- ○ Lifetime

#23: Are there multiple generations living in your home?

- ○ Yes
- ○ No (if selected, skip to **Question #25**)

#24: If you answered "yes" to the previous question, how many generations are currently living in your home?

- ○ Immediate family only
- ○ Immediate family with Grandparents and/or In-laws
- ○ Immediate family with Aunties/Uncles and Cousins
- ○ 4 generations and/or more

#25: Are you currently looking or considering a move to the mainland?

- ○ Yes
- ○ No (if selected, skip to **Question #27**)

#26: If you answered "yes" to the previous question, why are you considering a move to the mainland? **Check all that apply

- ☐ Work related opportunities
- ☐ There is a lack of affordable housing on Maui
- ☐ I am not able to afford the life I want, cost of living is too high for me in Hawaii
- ☐ I'm considering a move because of family obligations
- ☐ Other (please specify): _____

#27: Would you be willing to attend a County Council meeting to show support for a workforce housing project?

- ○ Yes
- ○ No (if selected, skip to **Question #30**)
- ○ Not at this time (if selected, skip to **Question #30**)

PLEASE CONTINUE TO THE LAST PAGE

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SECTION F: Connections and Resources on the Island of Maui (continued from Page 3)

#28: If you answered "yes" to the previous question, when would you be available to attend a County Council meeting?
****Please choose all that apply.**

- ☐ Morning
- ☐ Afternoon
- ☐ Evening

#29: If you answered "yes" to question #27, where would you be willing to attend a County Council meeting?
****Please choose all that apply.**

- ☐ West Maui
- ☐ South Maui
- ☐ Central Maui
- ☐ UpCountry Maui

#30: Would you be willing to submit written testimony to show support for a workforce housing project?

- ○ Yes
- ○ No
- ○ Not at this time

END OF SURVEY

MAHALO!

Thank you for taking the time to complete this survey. We hope to share your voice with those who make decisions about our housing needs on Maui.

Completed surveys can be mailed to:

Maui Economic Development Board, Inc.
Attn: Research Department
1305 N Holopono Street, Suite 1
Kihei, HI 96753

Please Sign Up

Visit **www.medb.org/wm-survey-mahalo** if you would like to sign up to participate at a county council meeting, attend a home buyers seminar, or would like more information on the home buying process.

Your survey results are anonymous and are not tied to the contact information you provide.

Questions?

Questions regarding this survey may be directed to **WMSurvey@medb.org**.

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WEST MAUI

Workforce Housing Survey

Do you live or work in West Maui?

Do you dream of owning your own home?

Looking to shorten your commute and spend more time with family and friends?

The West Maui Workforce Housing Survey is a grassroots, community-driven survey designed to determine the need for housing in West Maui from "the bottom up" as opposed to "top down".

We are seeking the input of neighbors, parents, small business owners, employees, visitor industry staff, and more to help us inform decision makers of what the resident workforce truly needs.

Take a few minutes today to complete the anonymous survey and help us better the West Maui community for those who live and work here.

Visit www.medb.org/WMsurvey to learn more.

DID YOU KNOW?

The 2018 median price for a single family home in Lahaina was $850,000.

For Lahaina condos, the 2018 median price was $526,500.

Source: Realtors Association of Maui

TAKE THE SURVEY NOW!

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Maui Workforce Housing Statistics

DID YOU KNOW?

When adequate or appropriate housing is unattainable to a large portion of the population, it negatively impacts the entire community and decreases overall quality of life. Source: Maui County General Plan 2030

One of the key constraints to economic development in multiple sectors is insufficient Affordable Housing.
Source: Maui County Comprehensive Economic Development Strategy (CEDS)

There is not enough affordable housing in the state and Maui is "maxed out" of housing units.
Source: Economist Paul Brewbaker at Maui Economic Summit. Maui News, p.A1, April 17, 2019.

WEST MAUI
Workforce Housing Survey

Learn more at medb.org/WMsurvey

TAKE THE SURVEY NOW!

Median home prices in Q1 of 2019 rose 7.7% over Q1 2018 to $735,000. Condo prices rose 10.2% to $525,000. Source: Maui News, p. A3, April 17, 2019.

The Median Price for single family home, Lahaina, 2018 (annual average): $850,000; for condos, the median in 2018 was $526,500.
Source: Realtors Association of Maui

Annual Median Household Income (AMHI): $74,100. Source: HUD

Median monthly mortgage: $2,279 p.m. or $27,348 p.a. (37% of AMHI) Source: Census Bureau

The percentage of cost burdened Households in Maui County (spending 30% or more on housing) is 50.8% Source: HUD

Annual Salary of 1st-year DOE teacher: $35,962 Source: Hawaii Dept of Education

The percentage of Asset Limited, Income Constrained Households (paycheck-to-paycheck) Maui Households is 51%.
Source: United Way ALICE Report

The working poor include child care providers, teaching assistants, wait staff, salespeople, administrative assistants, janitors, housekeepers, landscapers, and mechanics. Source: United Way ALICE Report

A single adult with no children needed to earn $17.08 per hour to meet basic needs and be economically self-sufficient. A two-adult couple with one preschooler and one school-age child needed to earn a combined wage of $37.22.
Source: 12/17 DBEDT Self-Sufficiency Income Standard Report

The Hawaii Minimum Wage is $10.10 per hour. Source: Hawaii Dept of Labor

The number of Vacant Housing Units (including rentals) is 26.4%. Source: Census Bureau

In Lahaina, 1 in 3 homes is used as a Vacation Rental unit (VRU). Source: Appleseed Center for Law and Economic Justice

Between 2008 and 2015, 52% of Maui homes were purchased by non-residents and 60% of Maui apartments and condos were purchased by investors and second home-owners, An estimated 52% of Vacation Rental Units in Maui County are owned by non-residents. Source: Appleseed Center for Law and Economic Justice