



Community Pulse Survey

August 13, 2020

Method



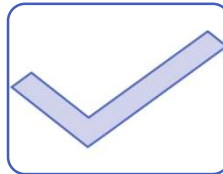
3 Waves
400 Completed surveys for each



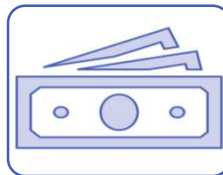
Residents statewide
Data adjusted to be representative



Online Panel

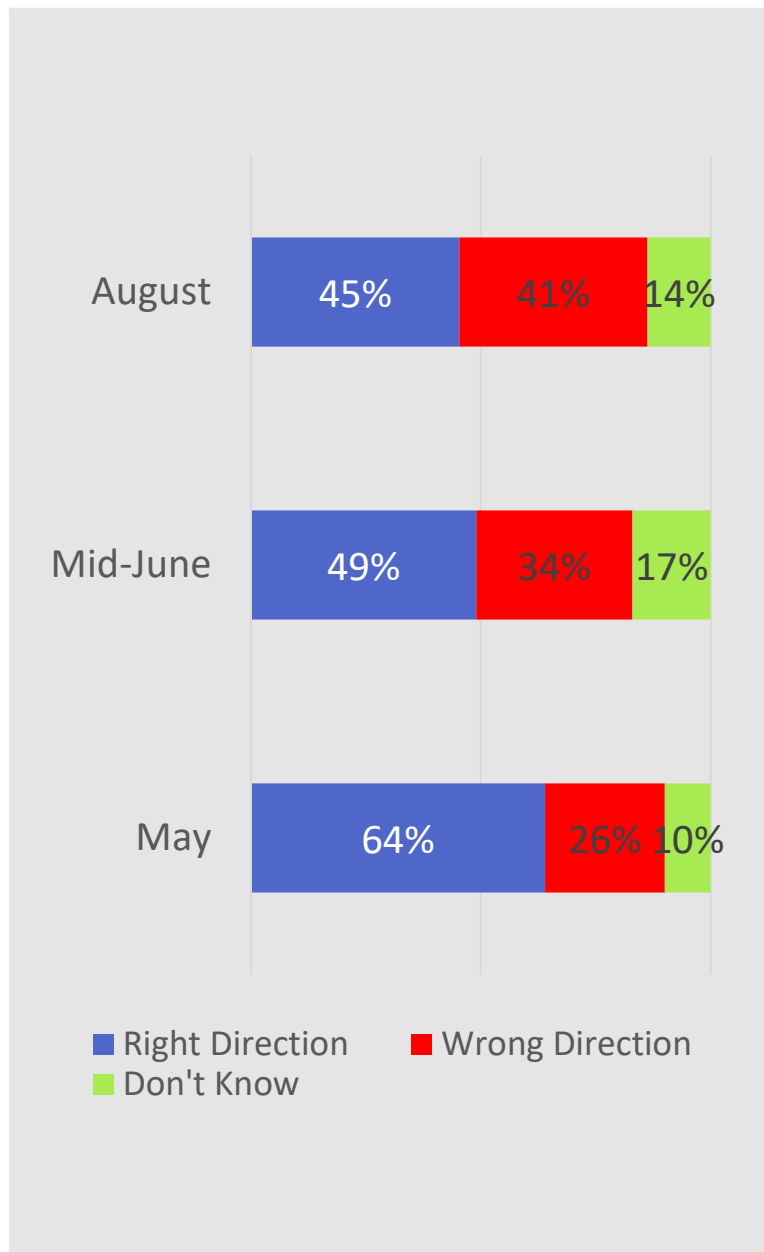


May 5-10
June 11-17
July 31-August 8



Independent study
Self-funded

Over time residents feel government's management of pandemic going in the wrong direction



Neighbor Islands more likely to think gov't going in right direction

State Trends & 7-day Averages

*Bars represent daily values and line represents 7-day averages



As case counts rise, residents' impression of the coronavirus situation it's still getting worse

60%

Neighbor Islanders

90%

O'ahu Residents

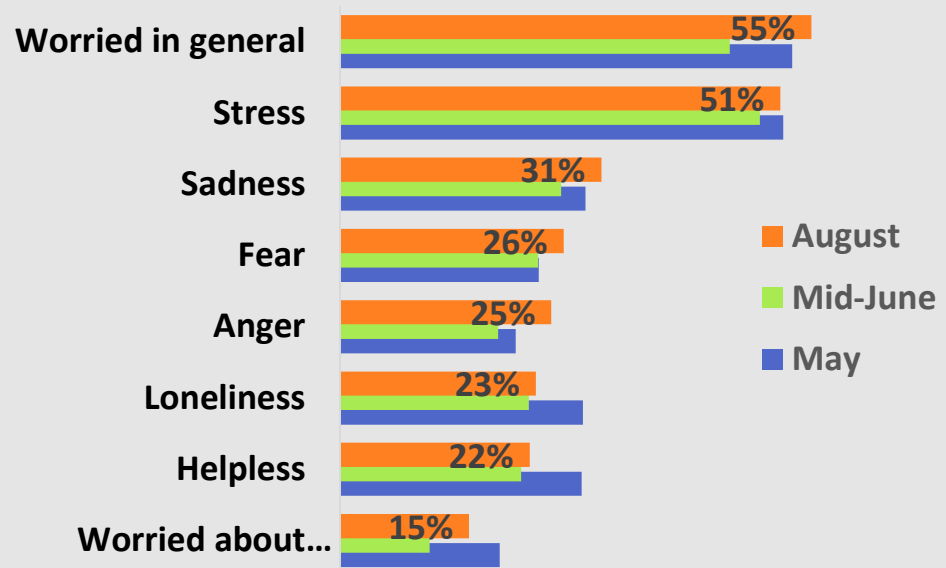
- Cultural factors and high costs of living create a situation for COVID to spread through large families that are unable to isolate
- The dominant tourism and service industries are still struggling; leaving many still not working
- Clusters at Honolulu Hale and other businesses may concern employees about a safe workspace

Worry and stress are equally concerning in Hawai'i & the Continent

75% Reported that they are worried that someone in their family will get sick from COVID-19

68% Stated that a great deal or a fair amount of their own life has been affected or disrupted by the coronavirus situation

Across all three periods, more than half of residents feel worried and stressed



Women were more stressed than men and twice as likely to feel worried

Native Hawaiians and Other mixed ethnicities felt more stressed than the general population

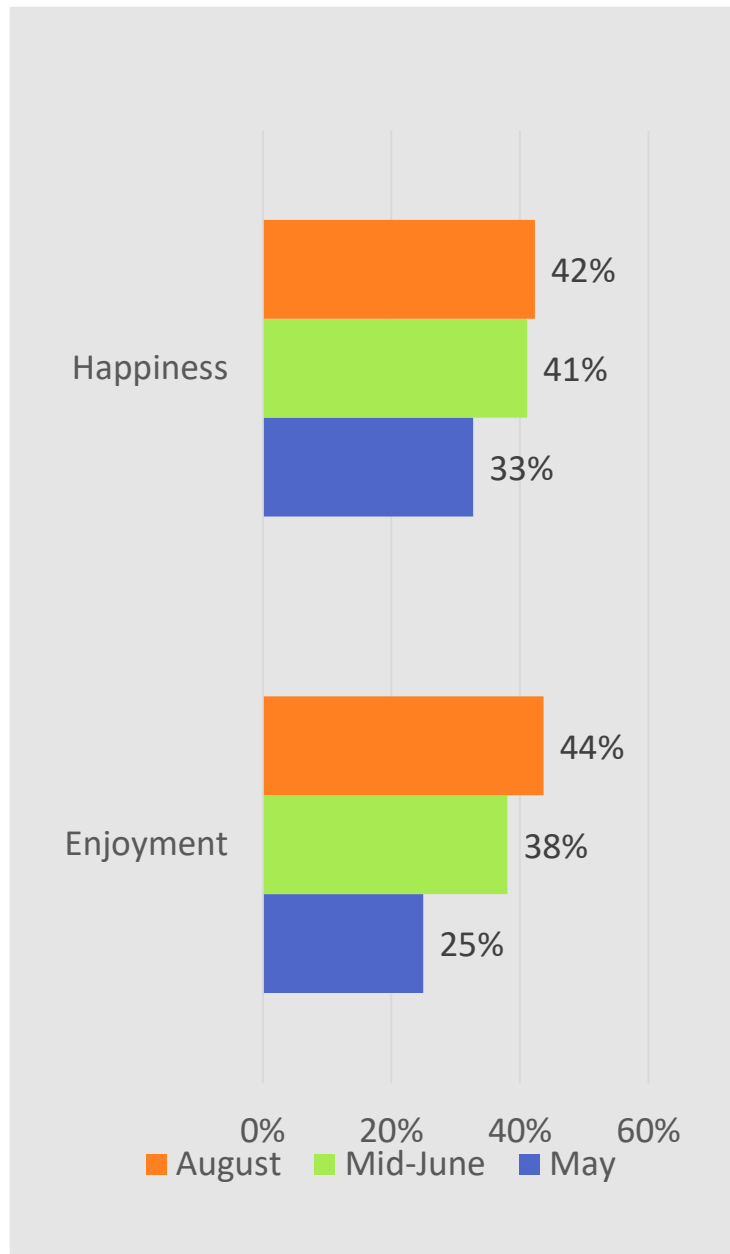
Financial Situation

41% Women just managing to make ends meet

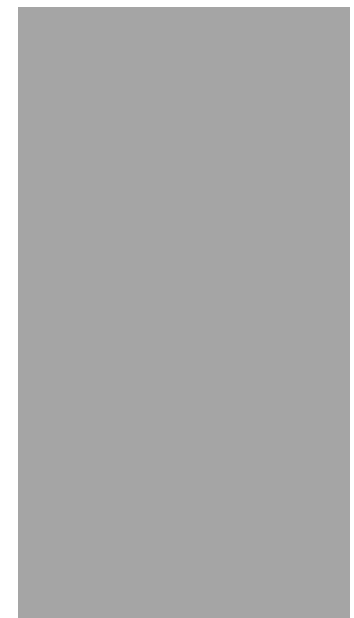
43% Filipinos also just making ends meet

23% Women drawing on their savings

8/13/2020



SMS Community Pulse Survey



Overall Residents continue to be happy and make the best of the situation

6

Neighbor Island residents are moving back to normalcy

71% NI went to a shopping center

67% NI went to beach

62% NI dined in a restaurant at least once last month

31% NI traveled outside of Hawaii

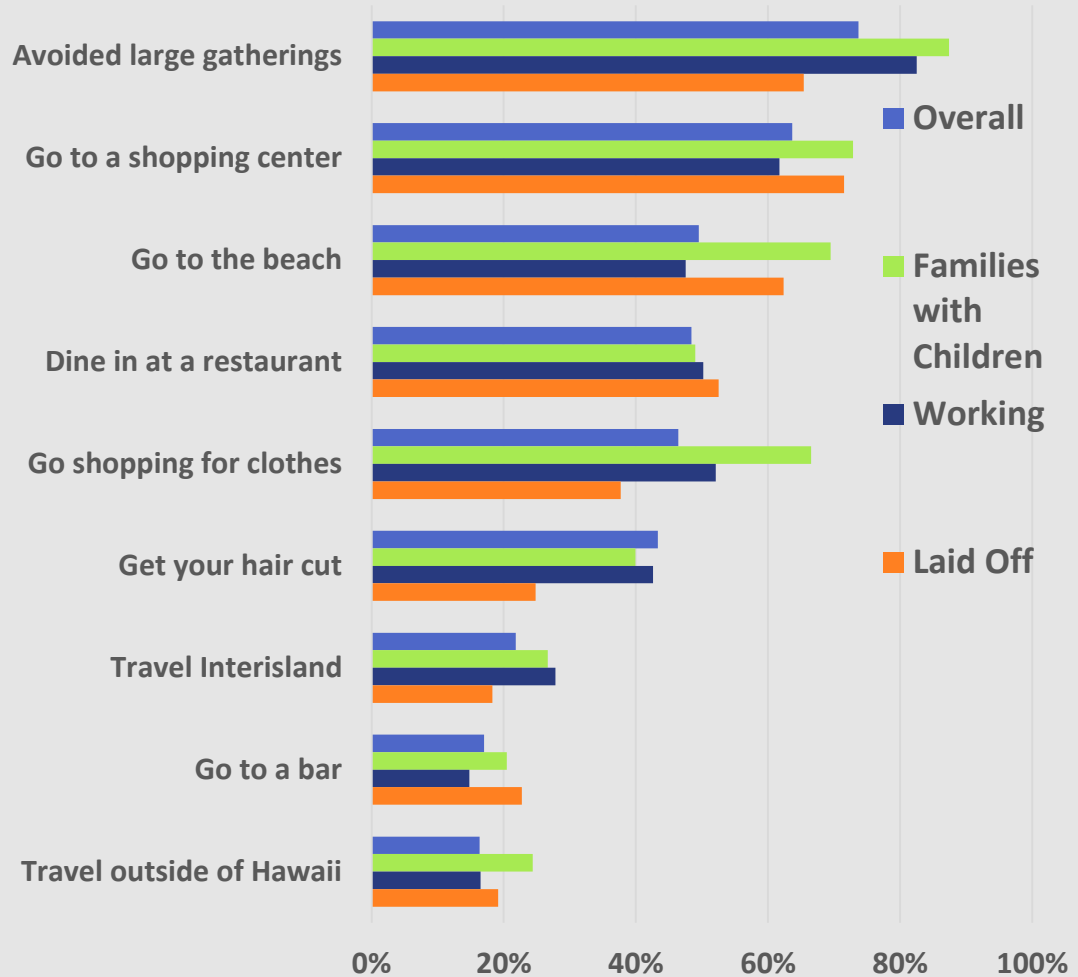
NI want to keep schools closed

Workers are still limiting activity

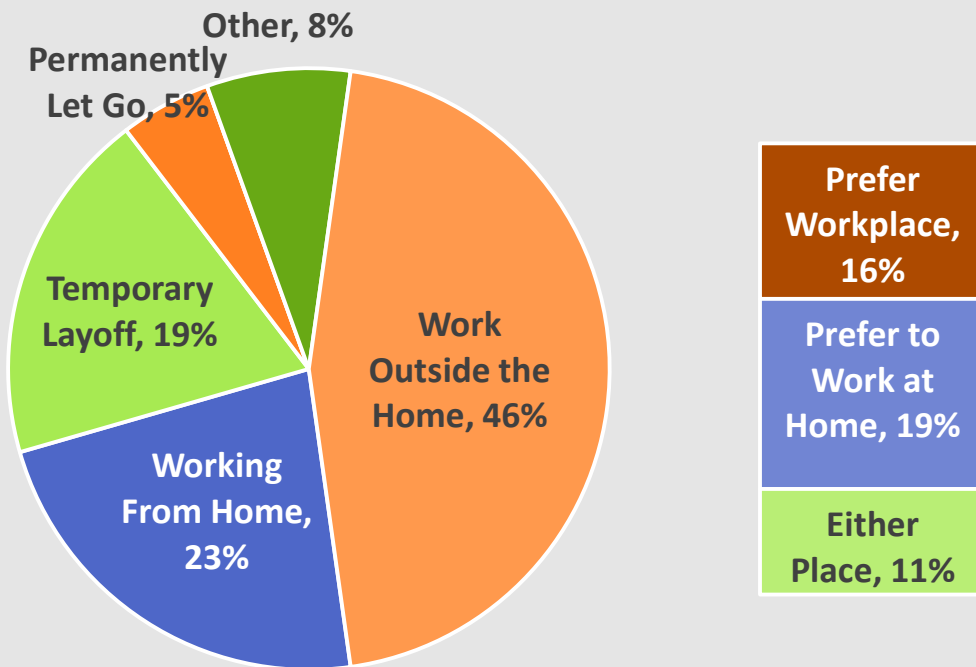
Well being is a leading indicator of increased consumer activity and expenditures

8/13/2020

Did One or More Times Last Month



SMS Community Pulse Survey



45% Filipinos have been temporarily laid off or let-go

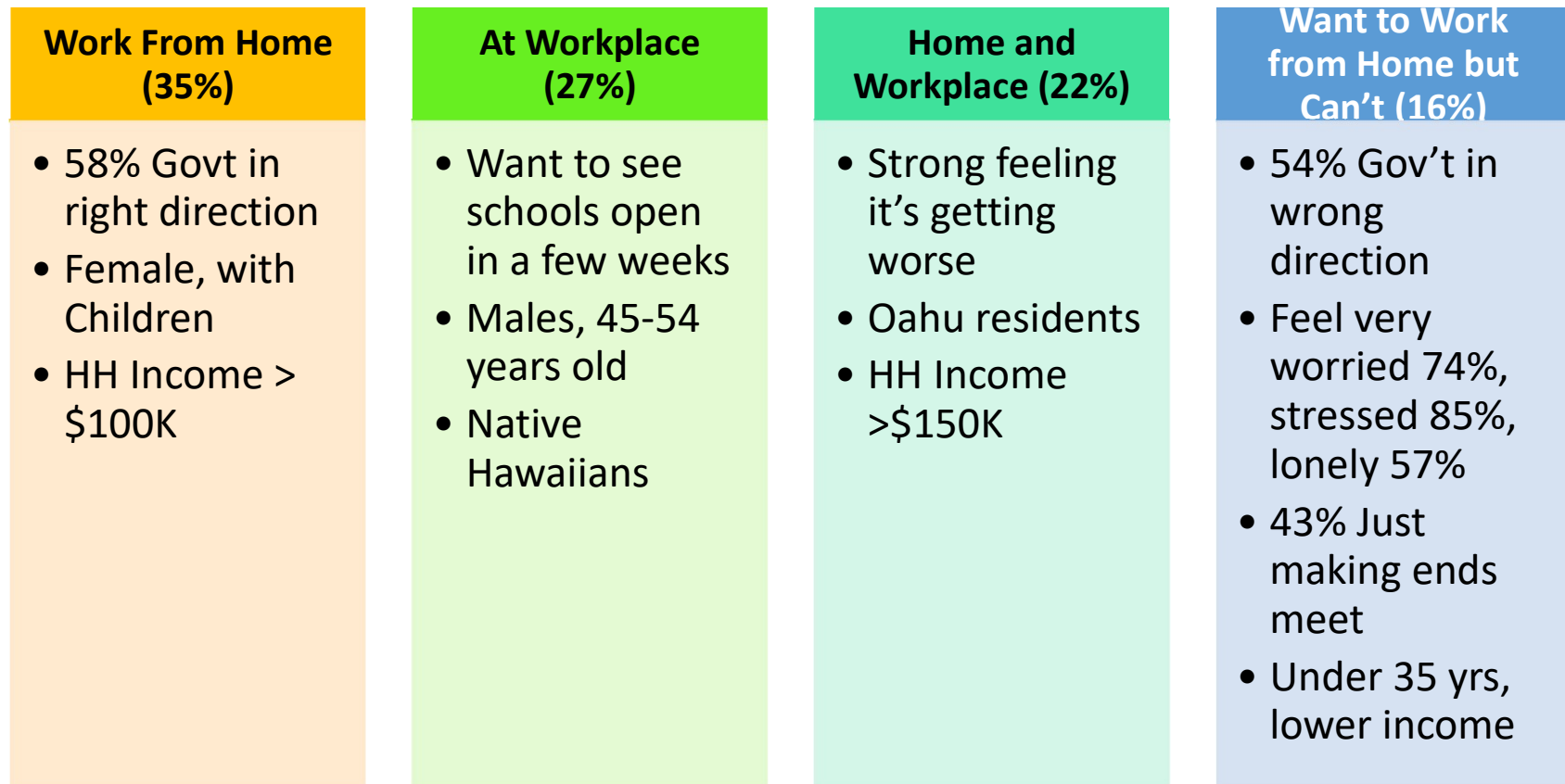
➤ *Oahu residents & Filipino residents are more likely to want tourism policies changed immediately*

46% Now working back at the workplace or outside their home

19% Prefer to work at home but are working outside

A challenge at the workplace will be to ensure that employees are comfortable working at the office

Preference for work location has unique characteristics



Employees' issues differ by the sector they work in



Private - 50%

- 50% Govt going in right direction
- 45% Worried
- Half still working from home



Public - 37%

- 47% Gov't going in the wrong direction
- 83% Worried
- 42% Just making it
- Majority are working outside the home, but most want to work from home or flexible



Non-Profit - 6%

- 72% Gov't going in the wrong direction
- Not worried (23%) but high level of stress, loneliness and sadness

*Note: 7% Declined or didn't know the sector type

Things to consider in the new normal

- How can you help your employees feel safe
 - Understand their stressors and needs
 - Identify who wants to work from home and why
- Consider future space needs
 - Safe office space
 - Changes in technology and work process
- Customers have same the concerns

Mahalo

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