

# Airport Area Transit-Oriented Development Plan

## Employer Survey EXECUTIVE SUMMARY

October 2014



Department of  
Planning & Permitting



**NRC**  
National Research Center Inc

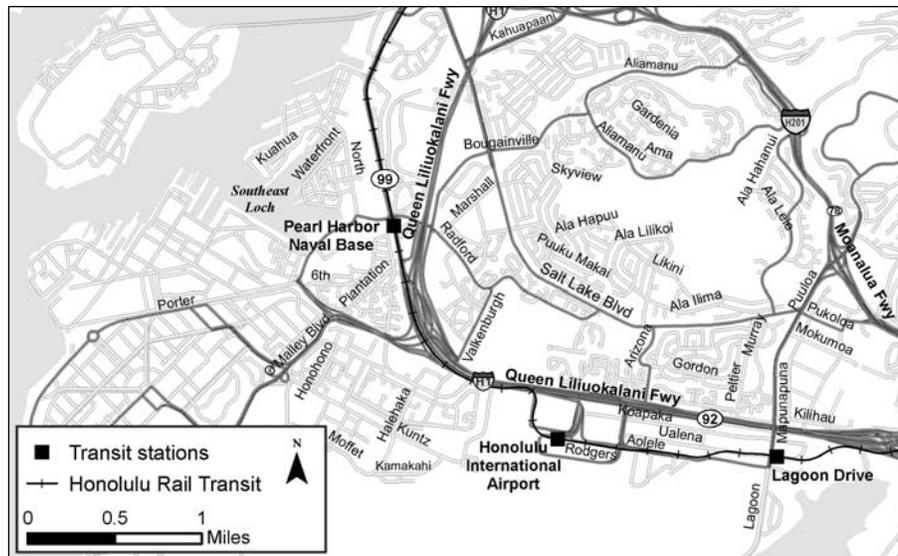
## Survey Background

### Survey Purpose

The Department of Planning and Permitting (DPP) of the City and County of Honolulu sought to capture the perspectives of employers located near the future rail transit stations at Pearl Harbor, Honolulu International Airport and Lagoon Drive. National Research Center, Inc. (NRC) assisted the City in conducting a survey to assess employers’ perceptions about their neighborhood and opinions about potential transit-oriented development opportunities in these areas. The results of the survey, combined with other sources of community input, will help the DPP make plans to guide future public investment and development around the rail stations.

### Survey Methods

A sample of 1,001 businesses was identified as being in the mapped area at right (the portion makai of Moanalua Freeway). This area around the rail stations at Pearl Harbor, Honolulu International Airport and Lagoon Drive is considered the project area. Surveys were mailed to 204 businesses around the Pearl Harbor rail station, 249 around the Airport station, and 548 around the Lagoon Drive station. Of the 1,001 mailed surveys, 80 were returned as undeliverable. Completed surveys were received from 204 employers, for a response rate of 20%, which is considered a strong response rate for a survey targeting employers. The margin of error is plus or minus 6 percentage points around any given percent for the entire sample.



### Survey Reports

This executive summary of the survey results highlights key findings across the entire Pearl Harbor/Airport/Lagoon Drive sample. A full report of the survey methods and results, including the survey itself and responses categorized by location, business customer type, building type, number of employees and tenure, can be found online at: [www.todhonolulu.org](http://www.todhonolulu.org).

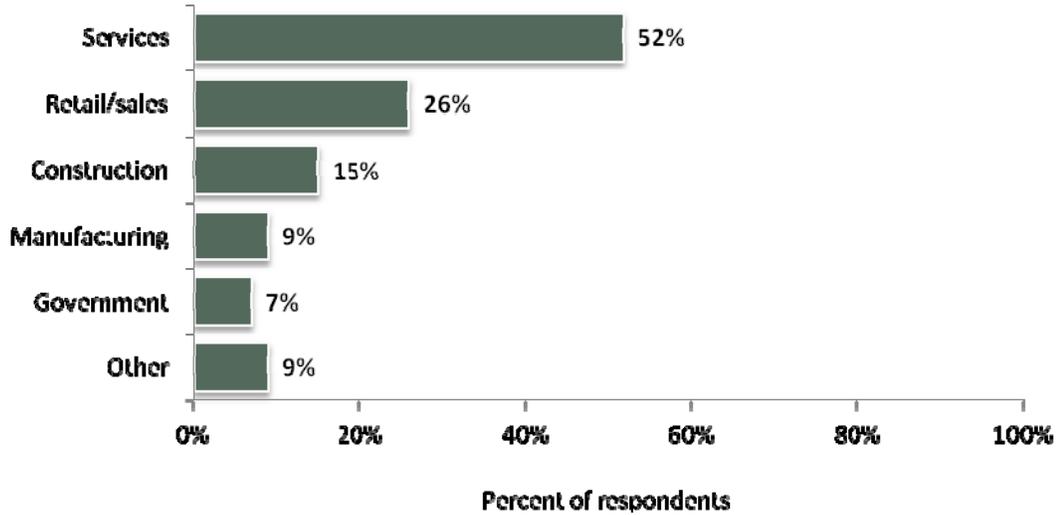
## Survey Findings

### Who We Heard From

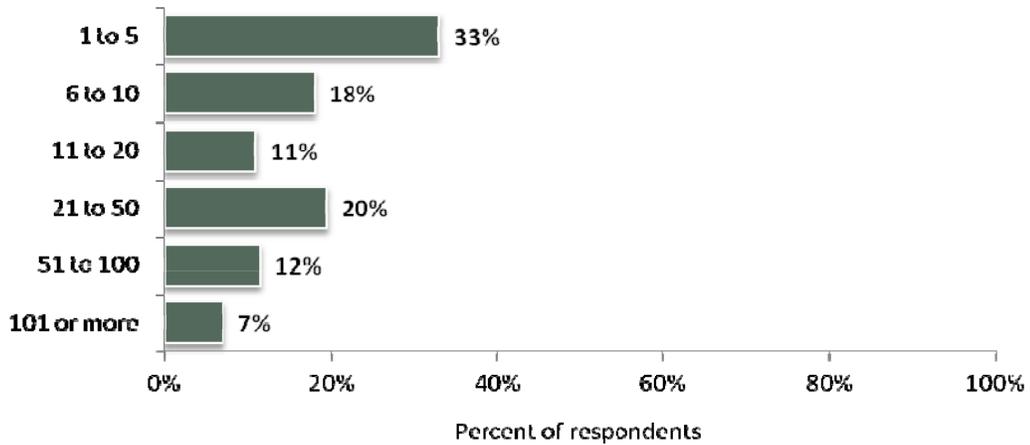
*Area businesses are largely in services and retail/sales, and most rent their facility*

Of the 204 responding employers, roughly three-fourths were in a service or retail/sales business, about one-fourth were in construction or manufacturing, and the rest were in government or another field (totals sum to greater than 100 percent because employers could pick more than one category). Sixty-two percent had 20 or fewer employees, while 71 percent of the businesses have been in existence for at least 20 years, and only 8 percent are less than 10 years old. Only 24 percent of employers said they owned their facility, while the rest said they rent.

Question 14: Which of the following best describes your organization?



Question 16: How many employees are at this location?

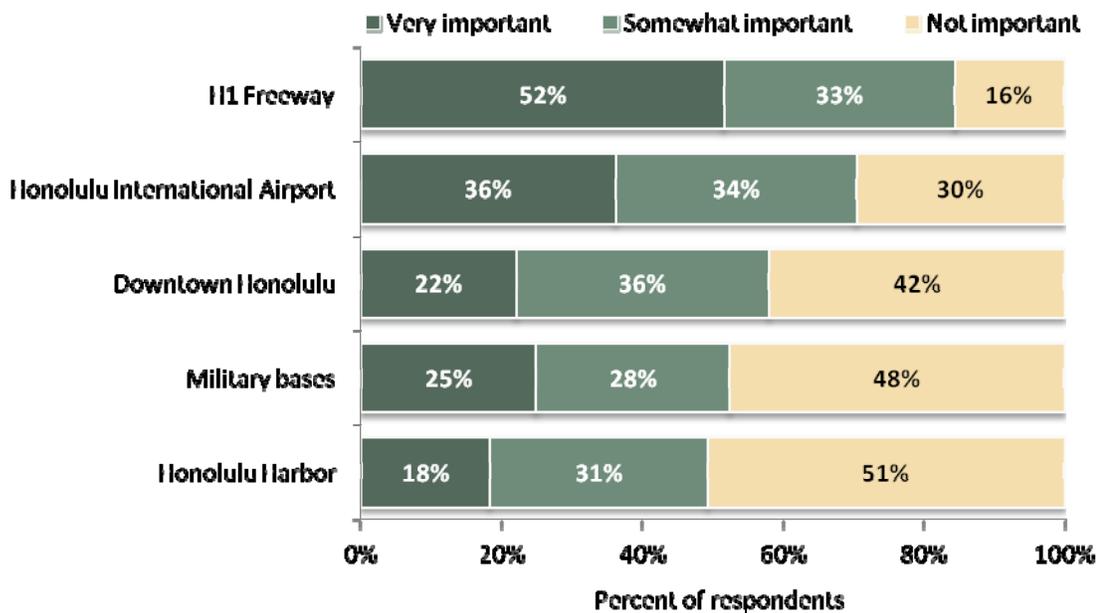


## Infrastructure and Neighborhood Characteristics

### *Employers say they're in the right place with the right-size facilities*

A significant majority of employers said being near the H-1 Freeway (85%) or Honolulu International Airport (70%) was important to their business, while proximity to Downtown Honolulu, military bases and Honolulu Harbor was also important to some. Those primarily serving other businesses or government were more likely to value proximity to the freeway than businesses that primarily serve individuals. Employers said they were satisfied with their business's location (96%) and size of facility (84%), and 82 percent said they had no plans to move. Eighty-four percent said they were satisfied with the size of their facility, although employers in multi-story buildings were more satisfied than those in warehouses or other types of buildings.

Question 4: Is it important to your business that you are located close to the following?



### *Significant concerns with safety and cleanliness highlighted*

Safety was expressed as a concern, with 56 percent of employers saying they felt safety was fair or poor during the day, 87 percent at night and 67 percent while waiting for buses. Seventy-one percent said the cleanliness of public spaces, such as streets and sidewalks, was fair or poor, and 77 percent said there were not enough trash and recycling receptacles in public areas.

### *Homelessness, lack of parking and vandalism seen as harming business*

Homelessness, a lack of nearby parking, and vandalism received the most responses when employers were asked what issues have had a negative impact on their business or employees. Eighty-seven percent of respondents said homelessness has had a very negative or somewhat negative effect; 83 percent cited a lack of nearby parking; and 81 percent said vandalism has had a negative effect. Other top concerns were illegal parking (76 percent), illegal dumping (75 percent), traffic delays (72 percent) and unwanted odors or noise (66 and 64 percent, respectively).

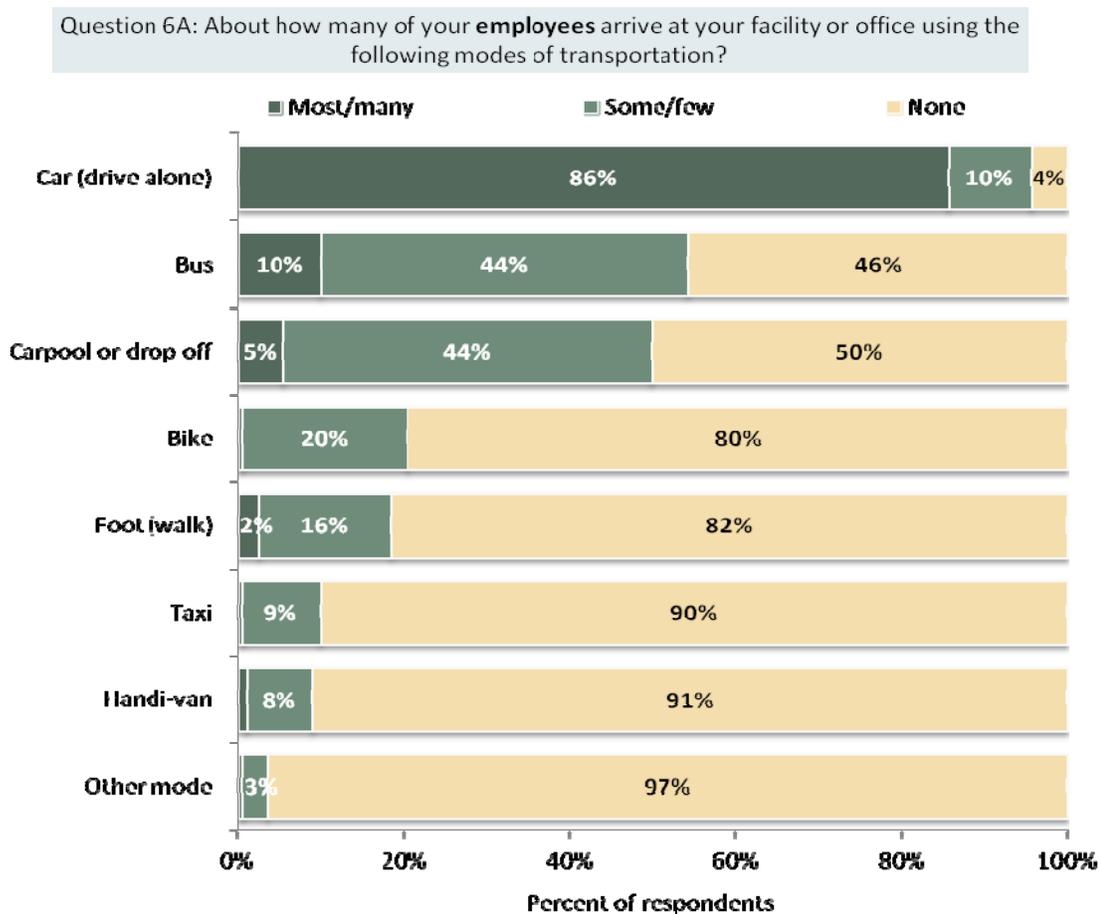
## Transportation Mobility

### *Most depend on cars and free parking; some commute by bus or bike*

Businesses in this survey area are highly dependent on automobiles, with 86 percent of employers saying that most or many of their employees drove alone to work, and likewise for their customers (according to 88 percent of employers). In contrast, 10 percent of employers said most or many of their workers ride the bus to work, and 5 percent said most or many carpool to work.

Free parking in surface lots was provided by 68 percent of employers to customers and by 64 percent of employers to their workers. Sixty-four percent of employers said free on-street parking was available to their businesses. A minority of employees paid for parking in surface lots (according to 12 percent of employers) and garages (7 percent), while customers of about 10 percent of the responding businesses paid for parking.

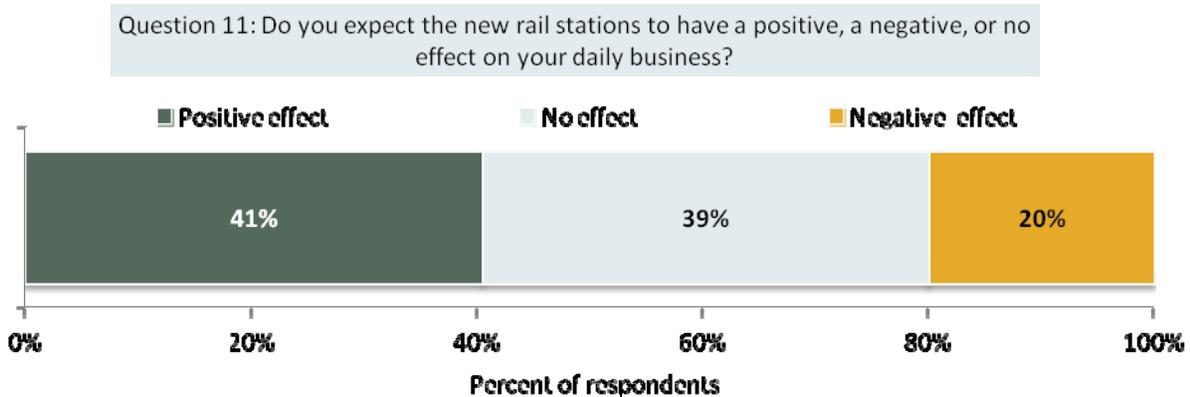
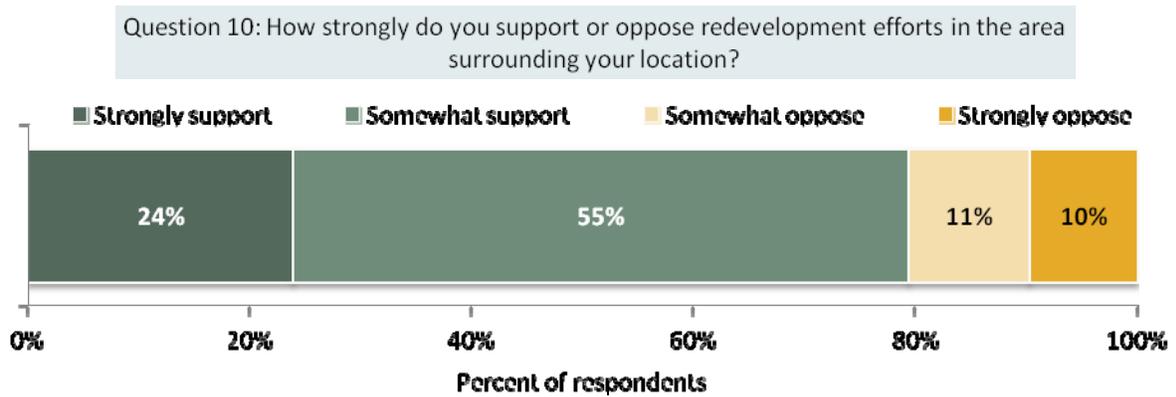
Forty-two percent of employers rated overall accessibility in their area as excellent or good, but few gave such marks for the condition of local streets (25 percent) or bicycling safety (10 percent).



## Development Opportunities

*Redevelopment efforts supported, but mixed feelings on whether rail will help or hurt*

Nearly 80 percent of employers said they strongly or somewhat support redevelopment in their area, but were more divided on whether rail stations in their area will have a positive or negative effect, or no effect at all. Amenities to improve automobile commutes were desired over housing. The most strongly wanted development items were improved lighting, increased parking, and better roads and other traffic improvements. More than half of the employers said housing, community centers and increased building density and height were not important for their area. The most-desired new businesses for the area were restaurants and coffee shops, gas stations and convenience stores.



*Homelessness tops concerns about new development*

More than half (53%) of employers offered no comment or had no concerns about the changes that redevelopment in their area could bring. Of those respondents who had a concern, the top concern (18 percent) was that more homeless people would come to their area. Other concerns included a lack of parking, and increases in traffic, crime and vandalism.

For more information on the City’s TOD program and a full report of survey results, visit [www.todhonolulu.org](http://www.todhonolulu.org). This report paid for by the taxpayers of the City & County of Honolulu.