

NRC

National Research Center Inc

2955 Valmont Road, Suite 300, Boulder, CO 80301 • t: 303.444.7863 • f: 303.444.1145 • www.n-r-c.com

Report of Results

Survey of Employers Located Near Honolulu International Airport

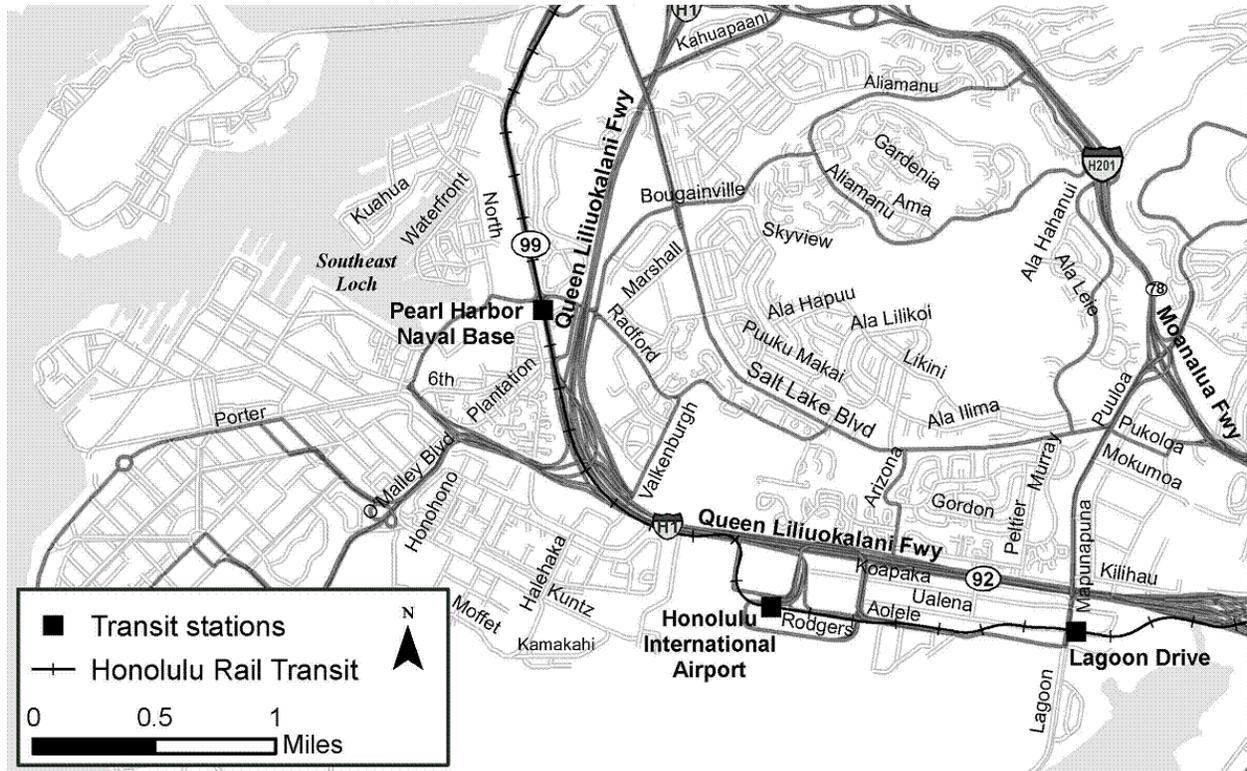
October 2014

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Survey Background

National Research Center, Inc. (NRC) worked with PBR HAWAII & Associates, Inc. and the City and County of Honolulu Department of Planning and Permitting to design and conduct a survey of employers located near one of three planned rail stations: Pearl Harbor Naval Base (Radford Drive), Honolulu International Airport, and Lagoon Drive (see map below).



Survey questions focused on what employers thought about this business area, potential development opportunities that would come with the building of the planned rail stations, and potential impacts on their business and employees.

Selecting the Survey sample

A list of employers that were located within the zip codes that included the area surrounding the planned stations was obtained from InfoUSA. This list included employers in the private, government and non-profit sectors, and was compiled from multiple sources, such as from online and phone listings from the White/Yellow Pages, and service registries. All addresses from this list were geocoded (i.e., exact latitude and longitude were identified) and mapped to determine their location in relation to the stations. The addresses that fell within the above mapped area, and were below the Moanalua Freeway were included in the mailing sample. For this survey, 1,001 businesses were identified as being in the area of interest, and all 1,001 were included in survey mailings.

Survey Mailing Methods

Employers were first mailed a postcard introducing the survey and asking them to watch for the survey in the mail. The first wave of the survey was mailed on August 27, 2014, and this mailing included a cover letter explaining the purpose of the survey, a survey and a postage-paid envelope for returning the completed survey. One week later, the second wave (including a reminder cover

letter, a survey and postage-paid return envelope) was mailed and an additional postcard reminder was sent the following week.

Survey Processing (Data Entry)

Mailed surveys were returned to NRC via postage-paid business reply envelopes. Once received, each survey was reviewed and “cleaned” as necessary. For example, a question may have asked a respondent to select one response out of a list of five, but the respondent checked two; staff would choose randomly one of the two selected items to be coded in the dataset.

Surveys were entered into an electronic dataset. This dataset was subject to a data entry protocol of “key and verify,” in which survey data were entered twice into an electronic dataset and then compared. Discrepancies were evaluated against the original survey form and corrected. Range checks as well as other forms of quality control were also performed.

Response Rates and Margins of Error

Of the 1,001 surveys mailed, 80 organizations were found to be closed or to have inaccurate contact information (surveys returned by the post office as undeliverable). Completed surveys were received from 204 employers, yielding a response rate of 20%. This is a strong response rate for a survey targeting employers. Given that these 204 employers represent a small population (1,001 employers), the 95% confidence level (or “margin of error”) for this survey is generally no greater than plus or minus six percentage points around any given percent reported for the whole group.

When subgroups are discussed in this report the margin of error increases (as there are fewer respondents in each subgroup) to as much as plus or minus thirteen percentage points for a subgroup of 49 respondents (see *Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees*).

For subgroup comparisons, Chi-square or ANOVA tests were applied to determine if results were statistically different. A “p-value” of 0.05 or less indicates that there was less than a 5% probability that differences observed between groups were due to chance; or in other words, a greater than 95% probability that the differences observed in the selected categories of the sample represented “real” differences among those populations. Where differences between subgroups were statistically significant, they are marked with grey shading in the appendices and discussed in the report body text.

How the Results are Reported

On many of the questions in the survey, respondents gave an answer of “don’t know.” The proportion of respondents giving this reply is shown in *Appendix A: Results Including “Don’t Know” Responses* but has been removed from the results presented in the report body. The body of the report displays the responses from respondents who had an opinion about a specific item.

For some questions, respondents were permitted to select multiple responses. When the total exceeds 100% in a table for a multiple response question, it is because some respondents are counted in more than one category. When a table for a question that only permitted a single response does not total to exactly 100%, it is due to the convention of rounding percentages to the nearest whole number.

When comparing results by subgroup in *Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees*, the full frequency distribution is not shown and instead, for ease of comparison, a summary measure is created. Summary measures are defined in the footnote of each relevant table.

Survey Highlights

Employers liked their location.

- 82% had no plans to move, 16% didn't know, and of the 2% planning to move, most would stay in the same area.
- 54% were very satisfied, and 42% were somewhat satisfied with the location of their facility.
- 52% said it was very important and 33% said it was somewhat important that they were located close to the H1 Freeway.
- 36% said it was very important and 24% said it was somewhat important that they were located close to Honolulu international Airport.

Employers were supportive of rail transit and redevelopment efforts.

- 41% expected the new rail stations to have a positive effect on their daily business, while 39% thought there would be no effect.
- When asked to write down any concerns, just over half did not have any to contribute.
- 79% of employers supported redevelopment efforts in the area surrounding their location.

The concerns employers currently had were also concerns they thought might be amplified with development.

- When asked which, if any, issues have had a negative effect on their business or employees, homelessness, lack of parking, and vandalism topped the list. Illegal parking and traffic delays were of concern to three-quarters of the employers.
- Of those with concerns about development, the most often mentioned issues were possible increases in the homeless population, more parking problems, and traffic issues.

Business employees and customers largely relied on cars for transportation.

- Close to 9 in 10 employers said most or many of their employees and customers drove alone to their facility, compared to 10% who said most or many took the bus, and about 5% who said most or many carpooled.
- Nine in 10 employers said they owned or leased at least one company vehicle that was parked or stored at their location. About 3 in 10 had ten or more company vehicles.

Walking and using bus transit infrastructure rated more highly than features supporting bike travel.

- While most gave good or fair ratings to the walking and bus transit infrastructure (sidewalks, crosswalks, bus stops, bus service and safety), most gave poor ratings to biking infrastructure (bike paths, lanes, racks, and safety while biking).

Amenities to improve automobile commutes were desired over housing.

- The most strongly wanted development features were improved lighting, increased parking, better roads, and infrastructure to improve traffic flow.
- More than half of employers said housing and community centers were not important for the area.
- Employers would most like to see more restaurants, gas stations, and convenience stores.

Who We Heard From

Overall completed surveys were received from 204 of the 1,001 employers that were identified as being in the target area. This is a strong response rate for a survey of employers. The organizations that responded were close to equally split in their target customers, with 53% primarily serving individuals and 47% serving other businesses or public institutions. About half of those completing the survey provided services, one-quarter were in retail or sales, and one-quarter were in construction or manufacturing.

Figure 1: Primary Customer Type

Question 15: Who are your primary customers?

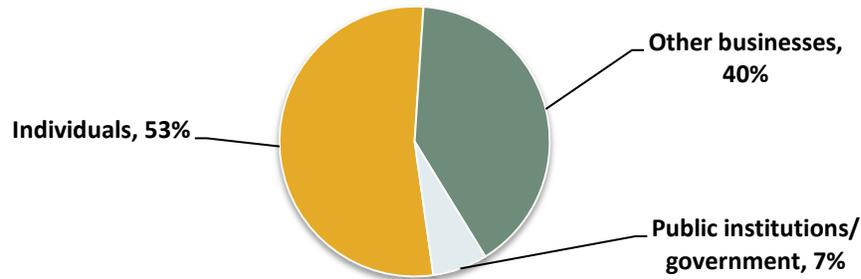
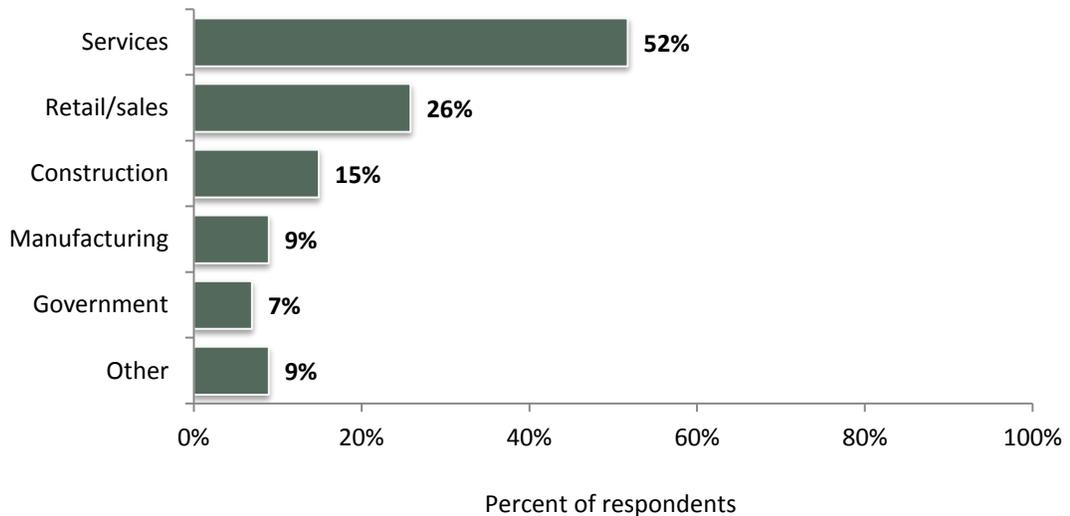


Figure 2: Type of Business

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



Verbatim responses from the “Other” category can be found in Appendix A: Results Including “Don’t Know” Responses.

Most employers rented their space, with only 24% saying they owned their facility. The types of buildings varied, with just under half describing their facility as a warehouse space; 36% indicated they were in a stand-alone structure, 20% said their building had a single story, and 28% said their building was multi-storied.

Figure 3: Building Tenure

Question 17: Do you rent or own your facility?

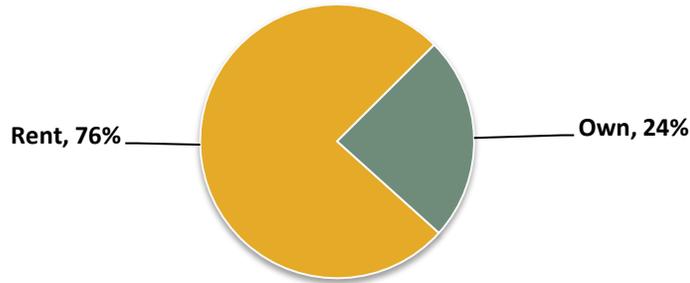
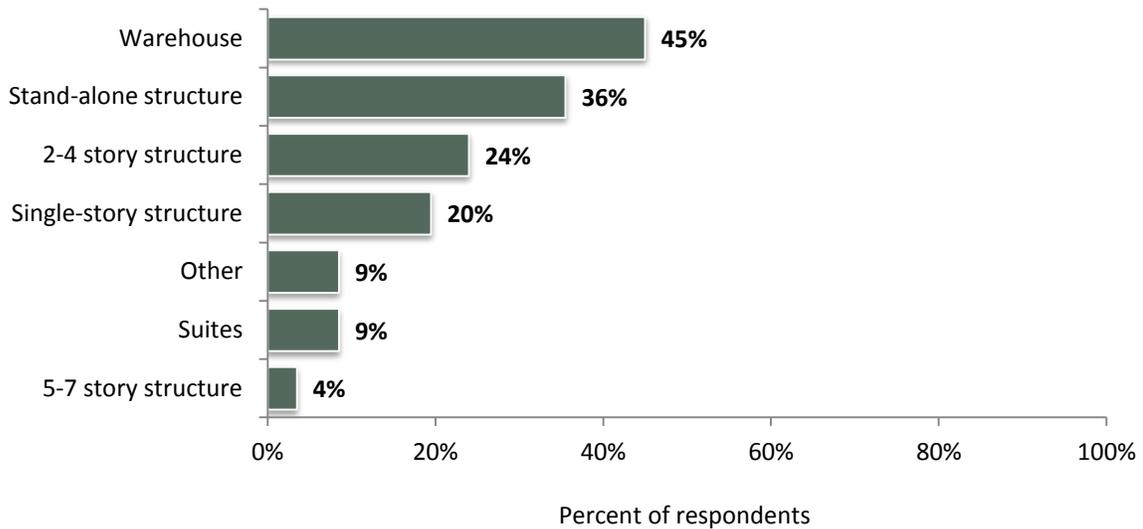


Figure 4: Type of Building

Question 19: In what type of building does your business operate? (Check all that apply)



May add to more than 100% as respondents could choose more than one category to describe their building.

While most of the responding businesses (71%) had been in existence for 20 years or more, the size of the businesses varied widely. About half had between 1 and 10 employees, 30% had 11 to 50 employees, and the remaining 20% had more than 50 employees. This variation in employer size was similar to the entire sample of 1,001 businesses.

Figure 5: Years in Business

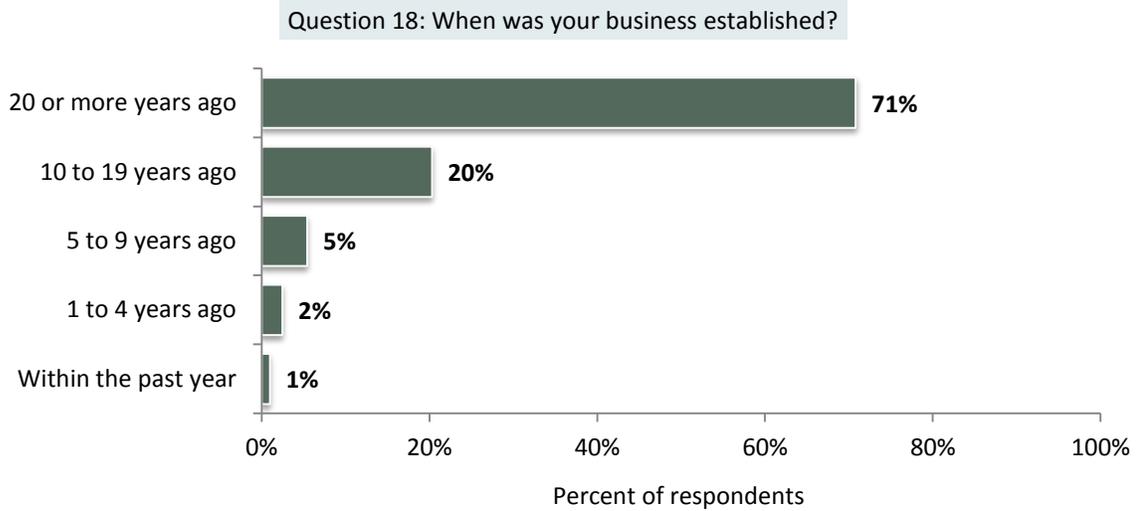
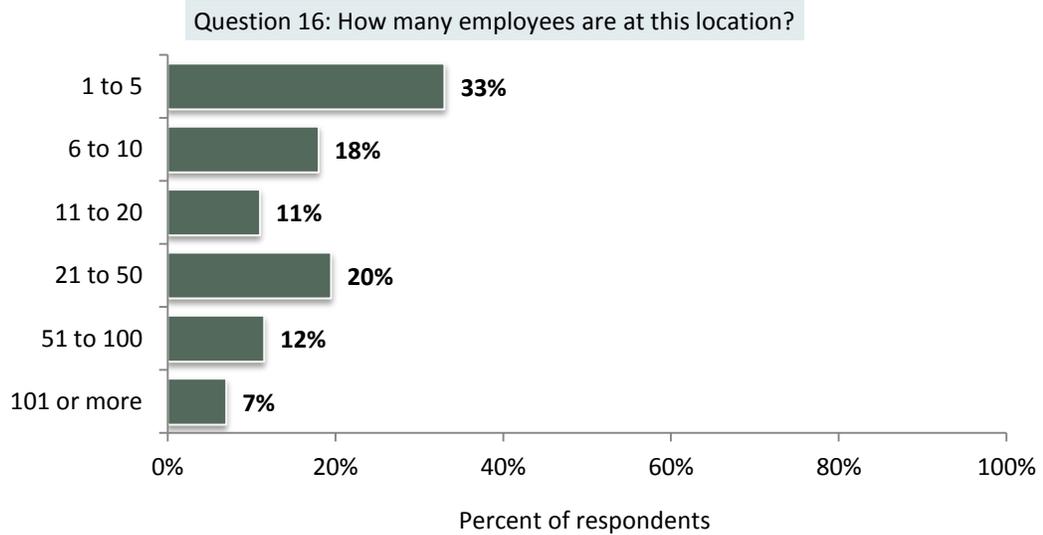
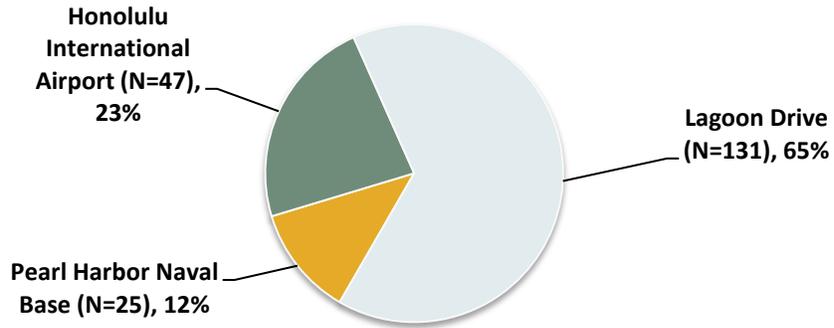


Figure 6: Number of Employees



Each survey had a unique number printed on the cover to identify the respondent organization's location. One respondent removed this number. Of the remaining 203, 25 were closest to the Pearl Harbor station, 47 were closest to the Honolulu International Airport station, and 131 were closest to the Lagoon Drive Station.

Figure 7: Closest Rail Station



What We Heard

Employers were asked to rate characteristics related to infrastructure and transportation mobility in the area near their business location and the planned transit stations (see Figure 8).

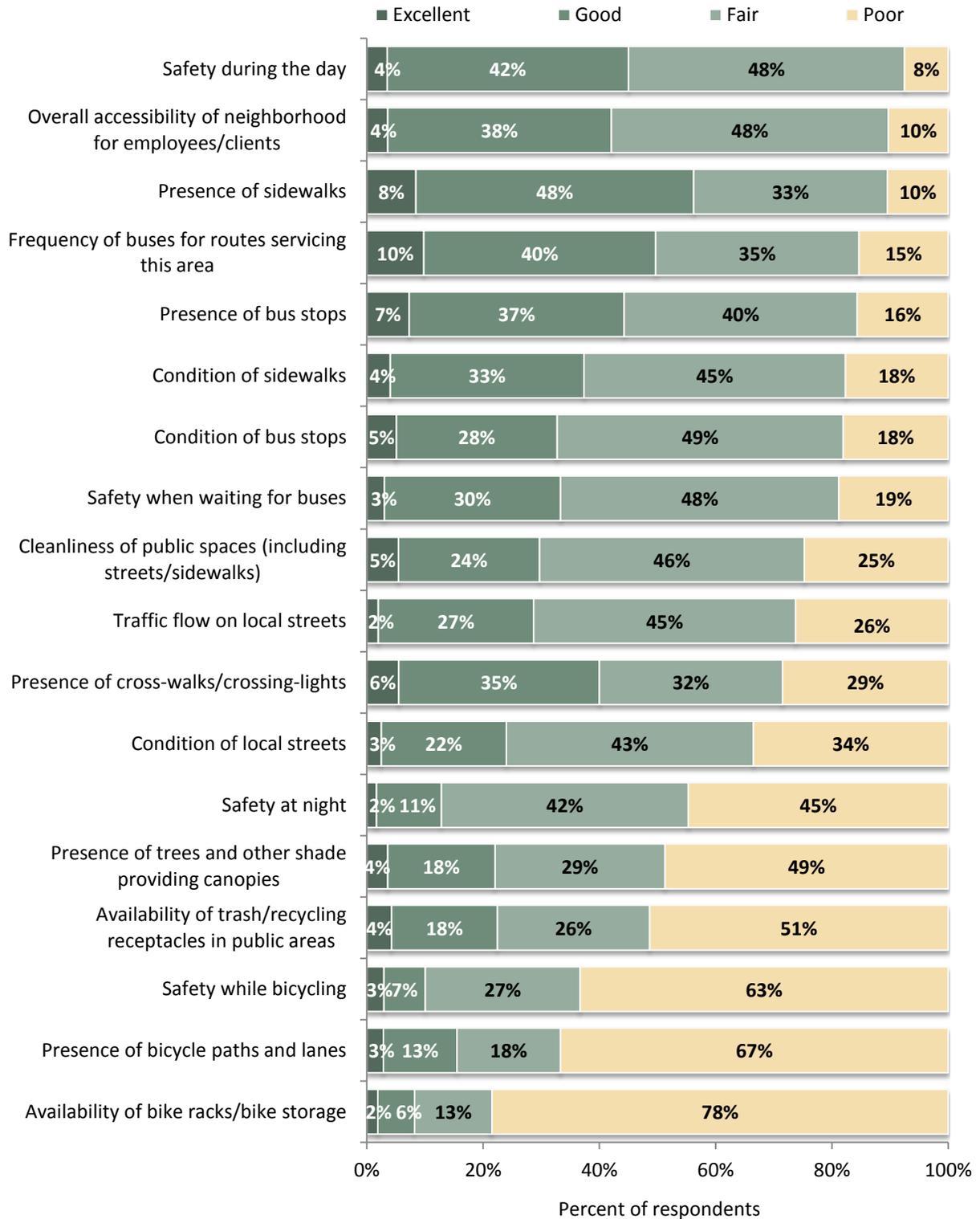
While 56% said the presence of sidewalks was excellent or good and 50% thought the frequency of bus routes was excellent or good, all other characteristics were rated as fair or poor by more than half of respondents. The best rated characteristics were safety during the day (only 8% thought this was poor), overall accessibility, and the presence of sidewalks (only 10% said this was poor). Characteristics related to bus transit (presence and condition of bus stops and safety when waiting for buses) and condition of sidewalks received the next best ratings (fewer than 20% said these were poor). About half of respondents rated safety at night, the presence of trees and shade canopies, and the availability of trash and recycling receptacles as poor. Bicycle infrastructure received the worst ratings; 78% said the availability of bike racks was poor, 67% said the presence of bike paths and lanes were poor, and 63% rated safety while biking as poor.

Appendix B highlights differences in ratings given by different types of employers as defined by their customer type (individuals or other businesses/agencies), tenure (building owners or renters), building type (warehouses, multistory buildings or other), and number of employees (20 or fewer compared to 21 or more). Ratings did not vary by the number of employees, but did have some variance by the other employer characteristics. Those who served business or government customers gave lower ratings than those serving individuals to the presence of trees and shade canopies, the availability of trash and recycling receptacles, the presence of bus stops and frequency of bus routes, and the condition of local streets. Renters gave lower ratings than owners to safety at night and safety when waiting for buses. Those who worked in a warehouse gave lower ratings than those in other types of buildings to safety at night, the condition of local streets, cleanliness of public spaces, the presence of trees and shade canopies, and the availability of trash and recycling receptacles.

Appendix C highlights differences in ratings given by those closest to each rail station. Employers near the Honolulu International Airport station had the highest ratings for nearly every characteristic, while those nearest Lagoon Drive station had the lowest rating for all the characteristics.

Figure 8: Ratings of Neighborhood Characteristics

Question 1: Please rate each of the following characteristics of the area around your office or facility's location and the nearest rail station.



When asked if any of a list of potential issues have had a negative impact on their business or employees, close to half of employers said that homelessness (47%), lack of nearby parking (49%), and vandalism (44%) had a very negative impact, with most other employers saying these had a somewhat negative impact (see Figure 9). Illegal parking (36%), illegal dumping (38%), traffic delays (29%), and unwanted odors (31%) had a very negative impact on close to one-third of respondents.

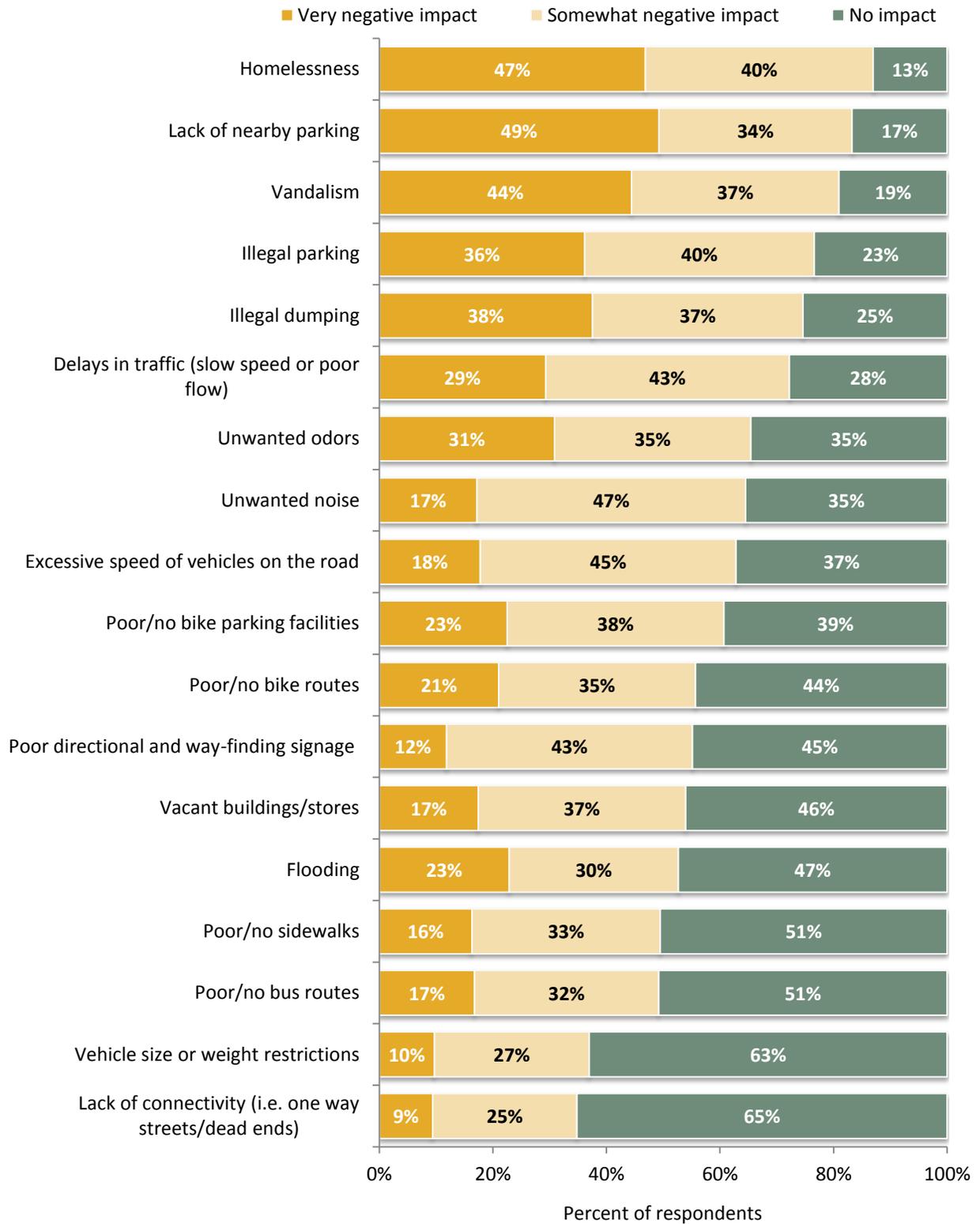
About half of respondents said that having poor or no sidewalks or bus routes had no impact on their business or employees, and closer to two-thirds said vehicle size or weight restrictions and lack of connectivity (i.e. one way streets/dead ends) had no impact on their business or employees.

The impact of most potential issues did not vary by employer type, with a few exceptions (see *Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees*). Vacant buildings were more likely to have a negative impact on renters than owners and on those serving businesses rather than individuals. Those working in warehouses were more likely to be negatively impacted by issues related to homelessness and vandalism, but less likely than those in other (non-warehouse and more than single-story) building types to be impacted by there being poor or no sidewalks. Those in larger companies (with 21 or more employees) were more likely to be negatively impacted by flooding than those with fewer employees.

Only two issues varied by location (see *Appendix C: Results by Proximity to Rail Station*). Flooding was much more common near Lagoon Drive (60% somewhat or very negative impact) than Pearl Harbor (26%), or the Airport (28%). And issues with homelessness were worse near Lagoon Drive (87% somewhat or very negative impact) than the Airport (81%), or Pearl Harbor (67%).

Figure 9: Issues with a Negative Impact of Business or Employees

Question 2: Which, if any, of the following issues have had a negative impact on your business or your employees?

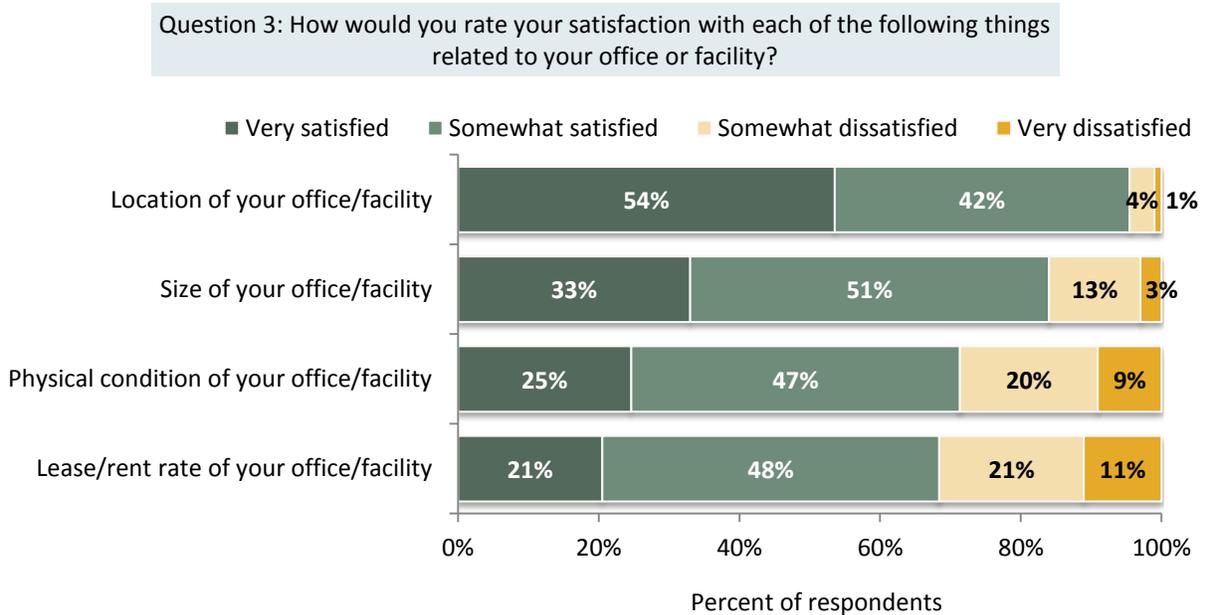


Most employers were very or somewhat satisfied with their office or facility. They were most satisfied with the location (96% somewhat or very satisfied) and somewhat less satisfied with the lease or rental rates (69%). Most also thought the space was a good size for their needs (84% somewhat or very satisfied) and in good physical condition (72%).

Employers that were in multi-story buildings were more satisfied than those in warehouses or other types of buildings, with the size, physical condition, and cost of their space. Owners were more satisfied than renters with the physical condition and location of their facility, and those with smaller companies (20 or fewer employees) were more satisfied with the size of their facility than those with more than 20 employees. (See *Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees*).

Employers near Pearl Harbor were more satisfied with their lease rates than those near the airport, and those near the airport were more satisfied than those near Lagoon Drive. Satisfaction with the other elements mentioned in Figure 10 did not vary by location (see *Appendix C: Results by Proximity to Rail Station*).

Figure 10: Satisfaction with Office or Facility

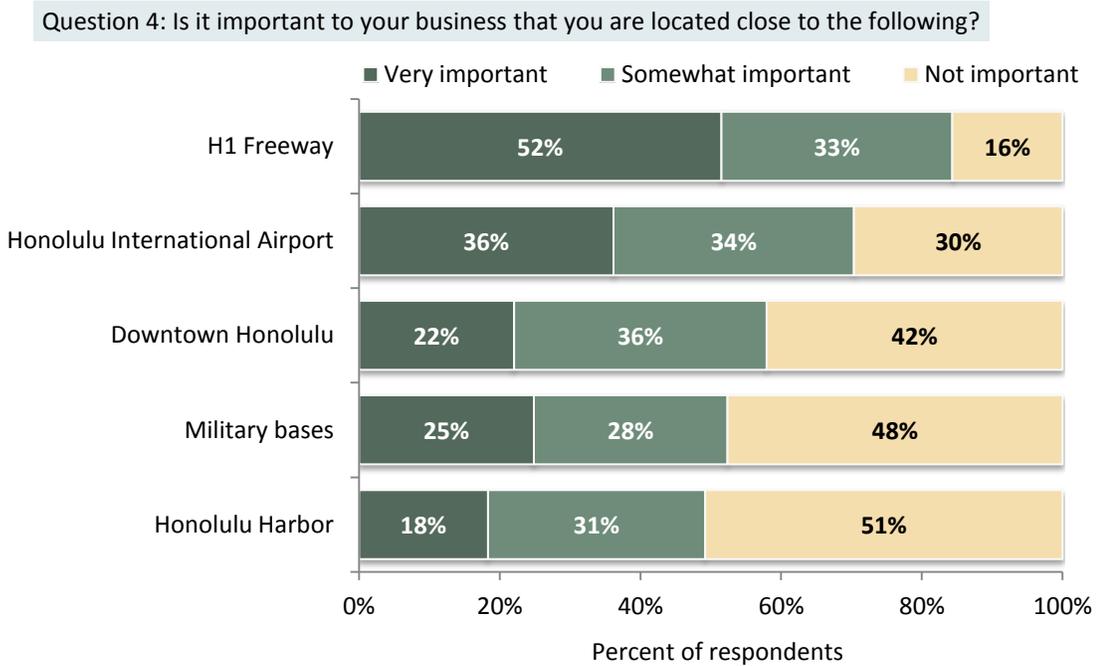


Probably related to the high degree of satisfaction with the location of their business, most respondents said that being near the H1 Freeway (85%) and the Honolulu International Airport (70%) was somewhat or very important to their business.

Those serving other businesses (or the government) were more likely to say proximity to the H1 Freeway was important, compared to those primarily serving individuals. Those in warehouses were more likely to cite the importance of proximity to the H1 Freeway and to Honolulu Harbor than those not working in warehouses. Owners were more likely than renters to value being near Honolulu Harbor, and businesses that served other businesses or the government were more likely than others to value being near the H1 Freeway. (See *Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees*).

Employers near the airport were more likely to say that being near the airport was important to the business than employers near Pearl Harbor and Lagoon Drive. The importance of proximity to the other locations mentioned in Figure 11 did not vary by employer location (see *Appendix C: Results by Proximity to Rail Station*).

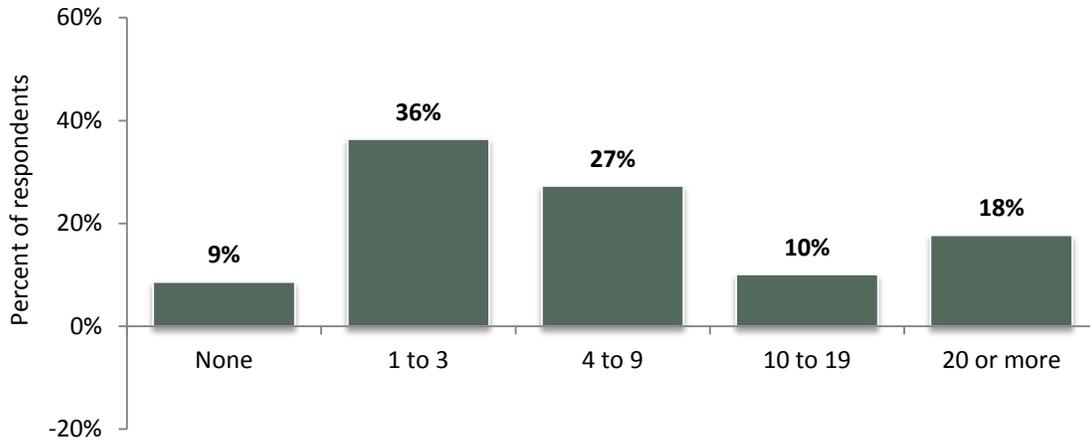
Figure 11: Importance of Location



Most of the employers in the area said they had at least one vehicle that was owned or leased by the business or agency and parked at their location. Only 9% said they had no company vehicles, and 36% said they had 1 to 3 vehicles. Those working in warehouses and those with more employees had more vehicles than those in multi-story or other types of buildings and those with fewer employees. (See *Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees*).

Figure 12: Company Vehicles

Question 5: How many vehicles are owned or leased by your business and parked or stored at this location?

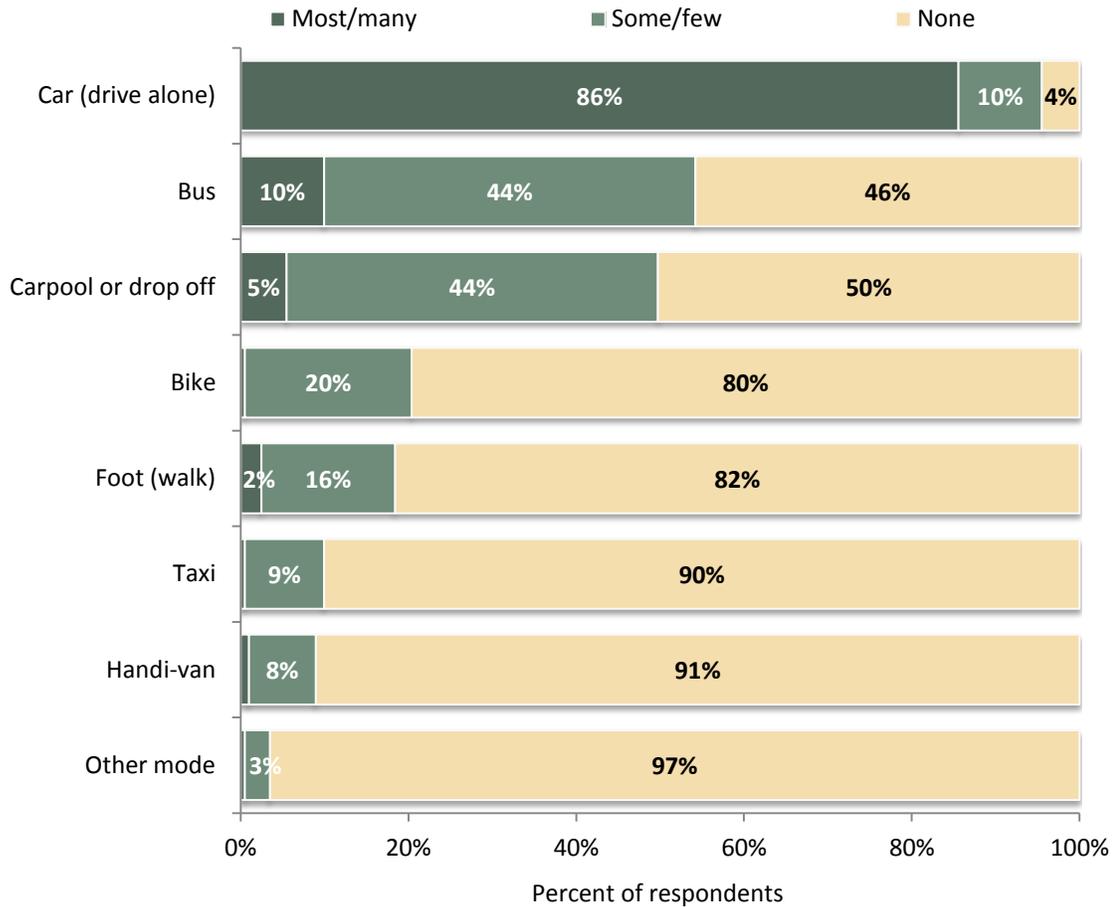


Employers indicated that most of their employees commuted to work by driving alone, but 10% said most or many of their employees took the bus, and 5% said most or many carpooled. About half of the employers said that at least a few of their employees took the bus or carpooled.

This did not vary by whether the building was owned or rented or by the type of building. However, employers whose businesses served individuals were more likely than those serving other businesses to say some of their employees walked or biked, and those with more employees were more likely to say some carpooled, took the bus, or drove alone.

Figure 13: Employee Transportation Modes

Question 6A: About how many of your **employees** arrive at your facility or office using the following modes of transportation?



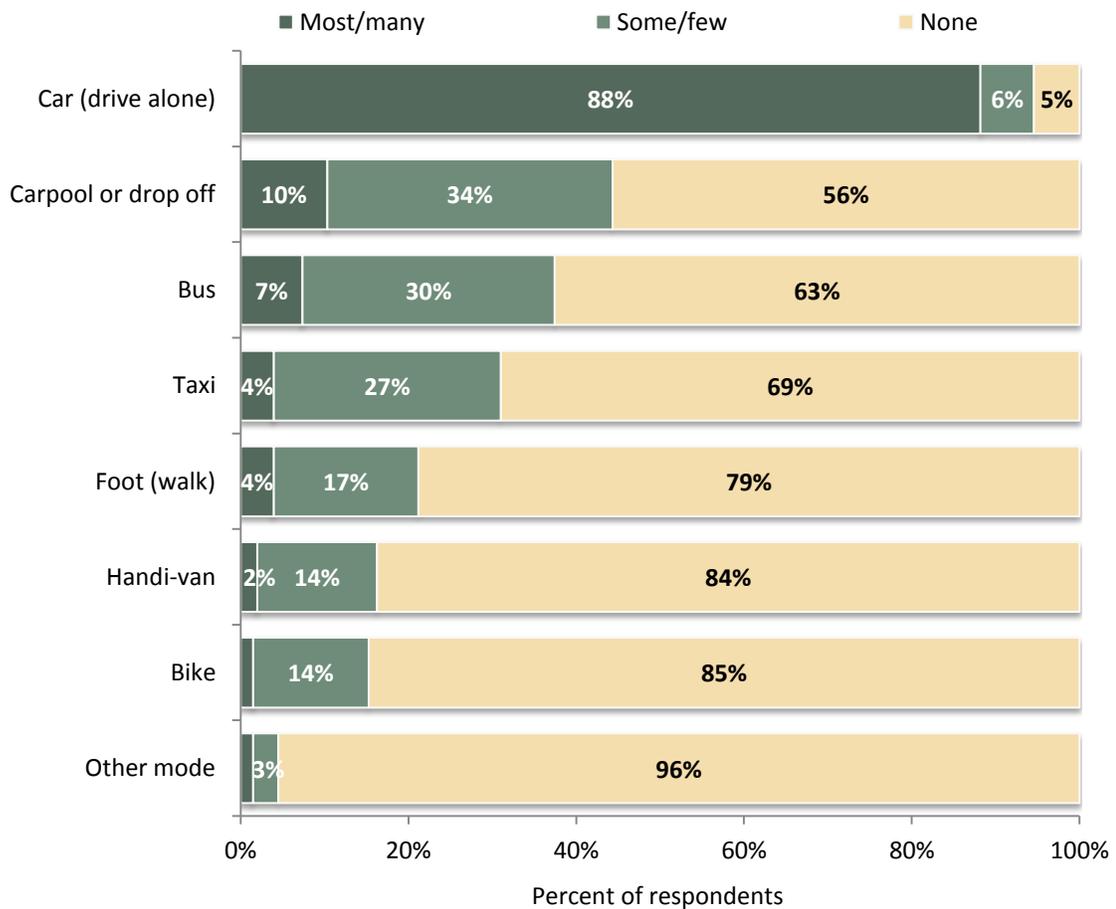
Similar to employee travel modes, most customers or clients arrived at the offices or facilities by driving alone, while only 10% said most or many of their customers took the bus and 5% said most or many carpoled. Compared to employees, fewer employers said at least a few of their customers took the bus or carpoled.

Customer travel modes varied more by business type than employee travel modes. Customers of businesses serving individuals were much more likely to use all of the alternative modes (carpool, bus, walk, bike, taxi and handi-van) than were customers of businesses serving other businesses or government agencies. Customers going to warehouses were much less likely to use alternative travel modes than those going to other types of buildings.

Employers near the airport were likely to say that their customers or clients used buses or taxis to get to their location than were employers near Pearl Harbor or Lagoon Drive. Customers' use of other transportation modes did not vary by employer location (see *Appendix C: Results by Proximity to Rail Station*).

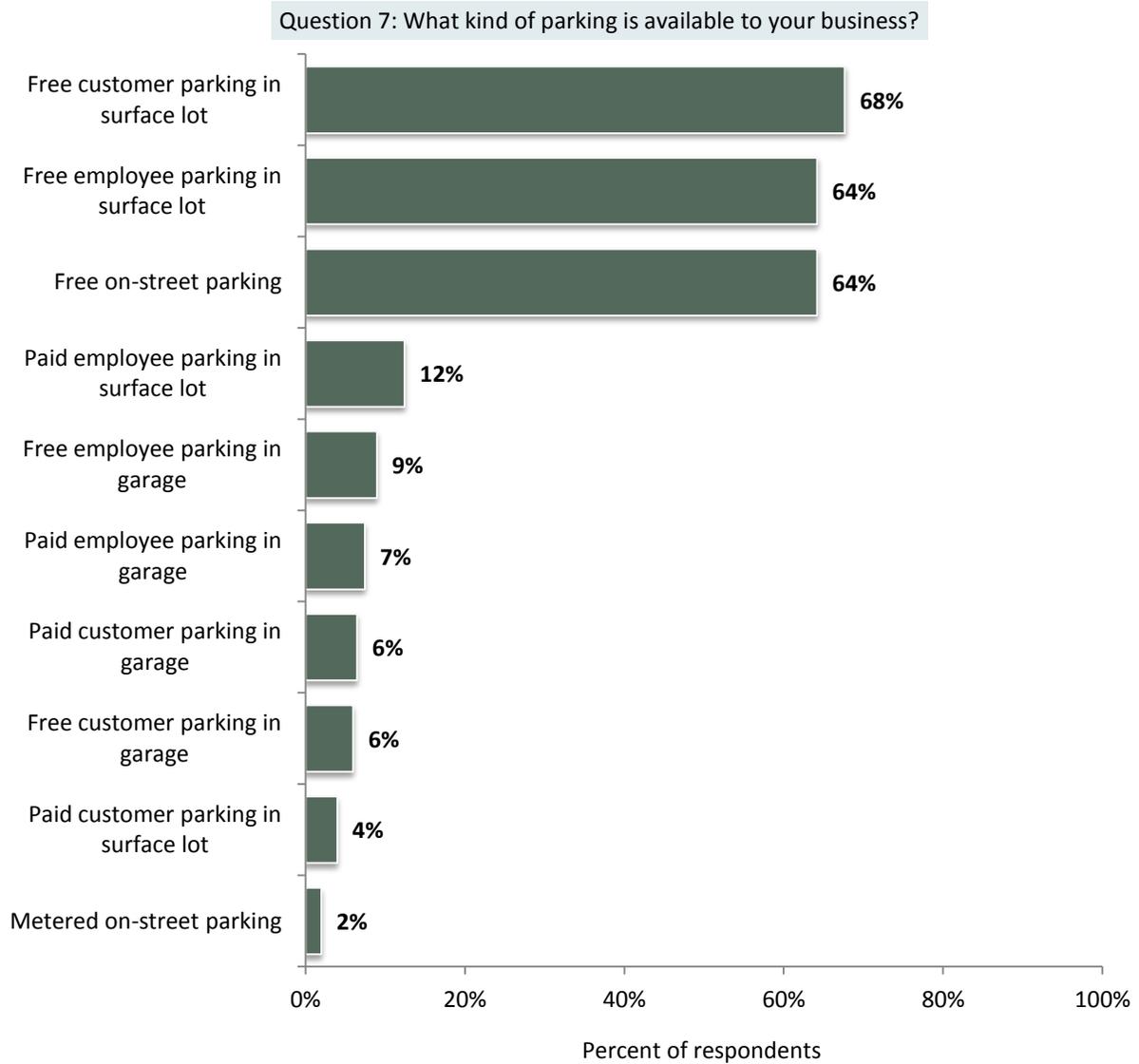
Figure 14: Customer/Client Transportation Modes

Question 6A: About how many of your **customers/clients** arrive at your facility or office using the following modes of transportation?



Free parking was very common in the neighborhood, and most businesses had access to a combination of free parking spaces in lots and on the street. However, some employees and customers did have to pay for parking.

Figure 15: Parking Availability



May add to more than 100% as respondents could indicate each type of parking that was available at their business.

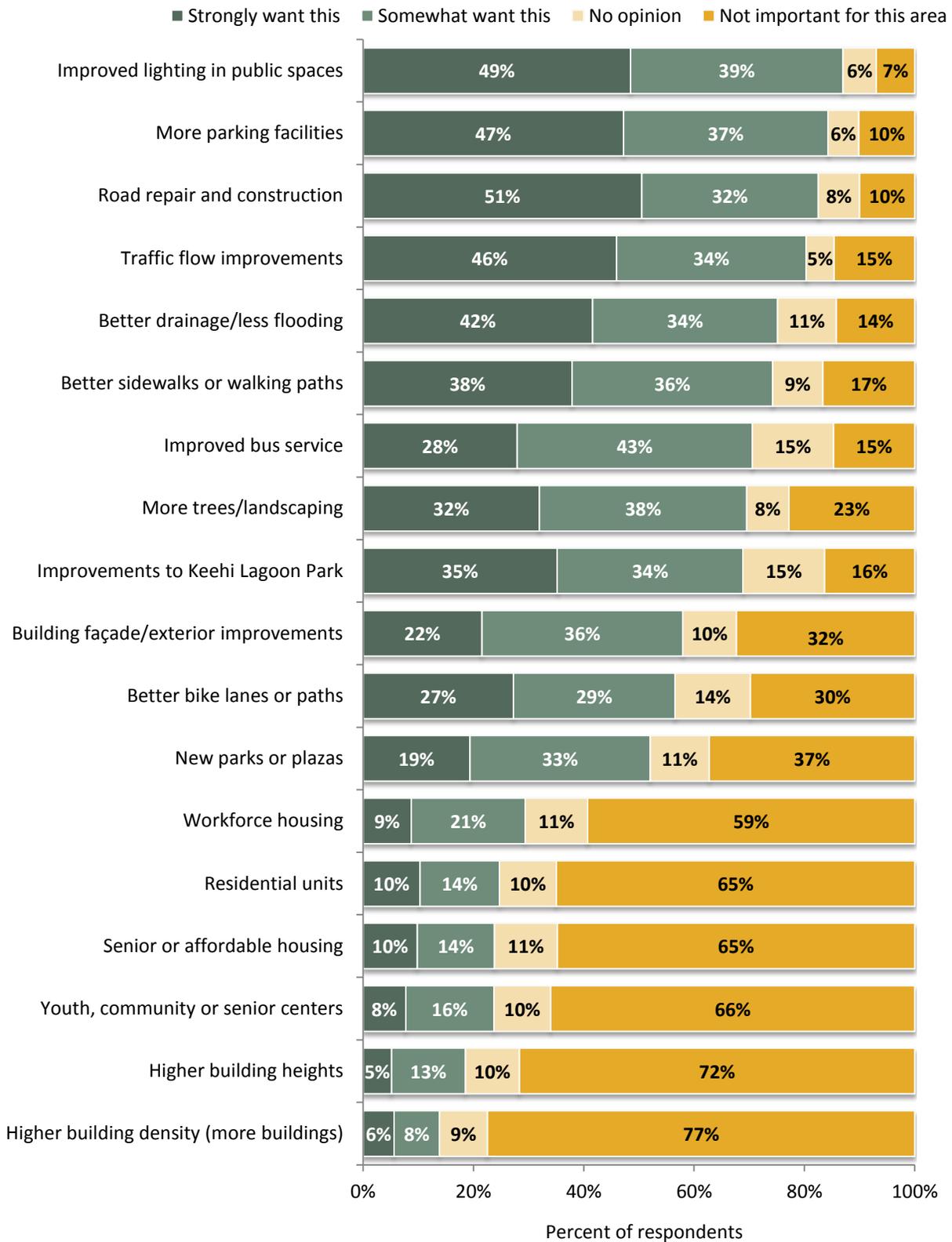
Employers were asked what features they would most like to see improved or added to the area near their business and/or the new rail stations as the stations are developed. The features that the largest majority of employers wanted to see were improved public lighting, more parking, and improved roads and traffic flow; about half said they strongly wanted these and most others somewhat wanted to see these improvements. Improvements to drainage, sidewalks, landscaping, Keehi Lagoon Park, and bus service were the next most desired improvements. Less desired was increased density (through more buildings or higher height buildings). Most employers also did not see a need for residential units, workforce or senior housing, and youth, community or senior centers.

Employers with more employees (21 or more) were more likely than those with fewer employees to want to see residential units and workforce housing, as well as improved bus service. Those working in warehouses were less likely to see a need for senior or affordable housing and youth, community or senior centers than those in multistory or other buildings, while owners were more likely than renters to see value in youth, community or senior centers. Businesses that primarily served individuals were more likely than those serving other businesses or agencies, to want residential units or senior or affordable housing, but those serving other businesses or agencies were more likely to want to see building façade and exterior improvements.

Employers near Pearl Harbor were more likely to say they wanted to see residential units, workforce housing, and youth, community or senior centers developed than were employers near Pearl Harbor or Lagoon Drive. Those closest to the airport were most likely to want more parking and parks or plazas developed. Desire for other amenities did not vary by employer location (see *Appendix C: Results by Proximity to Rail Station*).

Figure 16: Desired Development Features

Question 8: If new development or redevelopment occurred near your location and/or the new rail station, which of these features would you most, or least, like to see?



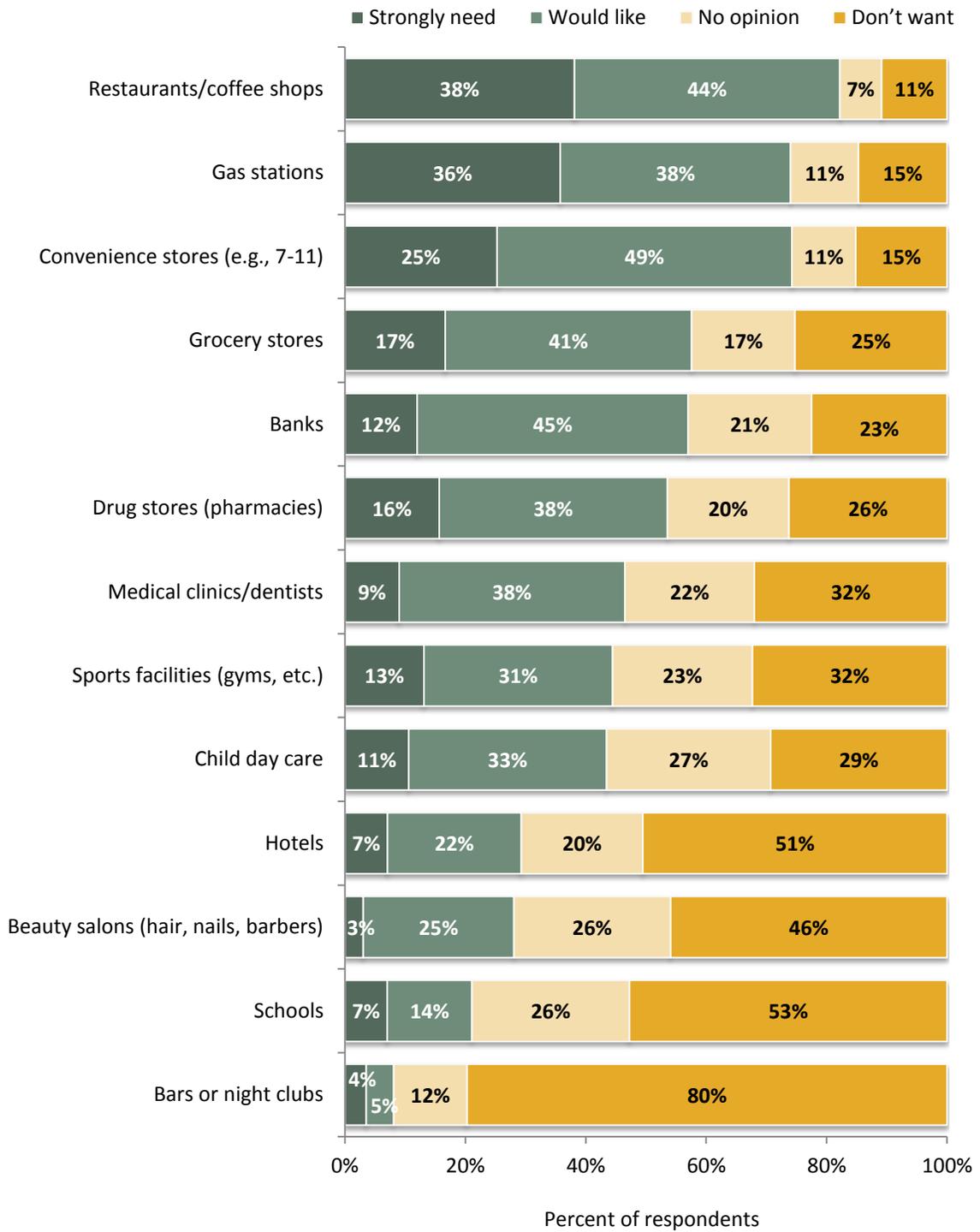
When asked what potential businesses could be added to the area to best help meet business and employee needs, employers chose restaurants or coffee shops, gas stations, and convenience stores as most needed. Grocery stores, banks, and drug stores were not as strongly needed, but were wanted by over half of respondents. Least desired were bars or night clubs and schools.

Employers in warehouses and those serving business clients (rather than individuals) were more likely than their cohorts to want new gas stations in the area, but less likely to be interested in sports facilities. Warehouse employers were also more likely to want convenience stores, as were employers who rented their facilities. Renters were also more likely than owners to want bars or nightclubs and hotels. Employers with 21 or more employees were stronger proponents of restaurants and coffee shops and less interested in schools than those with 20 or fewer employees.

Employers near the airport were more likely to say they wanted to see grocery stores, beauty salons, and hotels developed than were employers near Pearl Harbor or Lagoon Drive. Those closest to Pearl Harbor were most likely to want schools developed and those near Lagoon Drive were least likely to want new sports facilities. Desire for other amenities did not vary by employer location (see *Appendix C: Results by Proximity to Rail Station*).

Figure 17: Desired New Businesses

Question 9: Which types of new businesses would you most like to see move into your area to help meet your business' or employee's needs?



About 8 in 10 of the employers said they somewhat (55%) or strongly (24%) supported redevelopment in the area surrounding their location and most thought it would have a positive (41%) or no effect (39%) on their daily business. Two in 10 employers were concerned about the effects of development and did not support it. Renters were more concerned about negative effects than owners.

Those near the airport were the strongest supporters of redevelopment efforts and expected the most positive effects. However, the majority of those near each of the three stations at least somewhat supported redevelopment and expected a neutral or positive effect.

Figure 18: Support for Redevelopment of Area

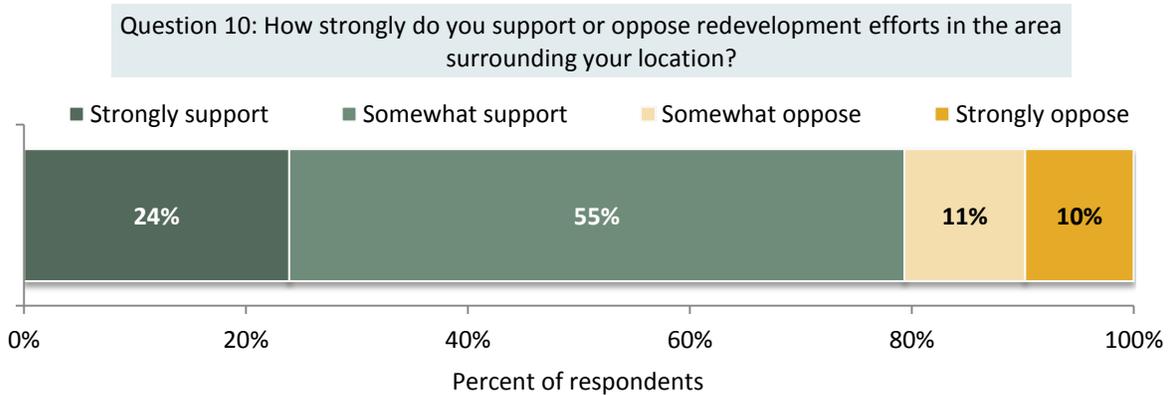
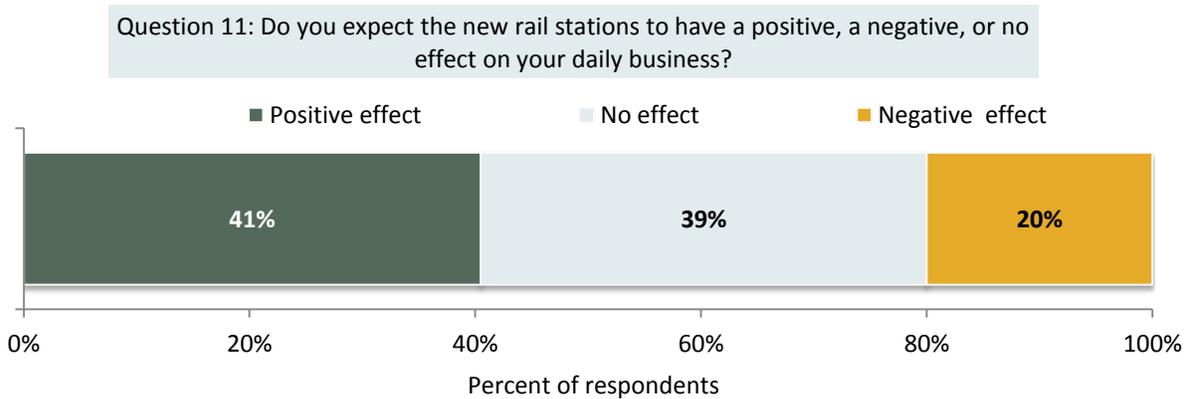
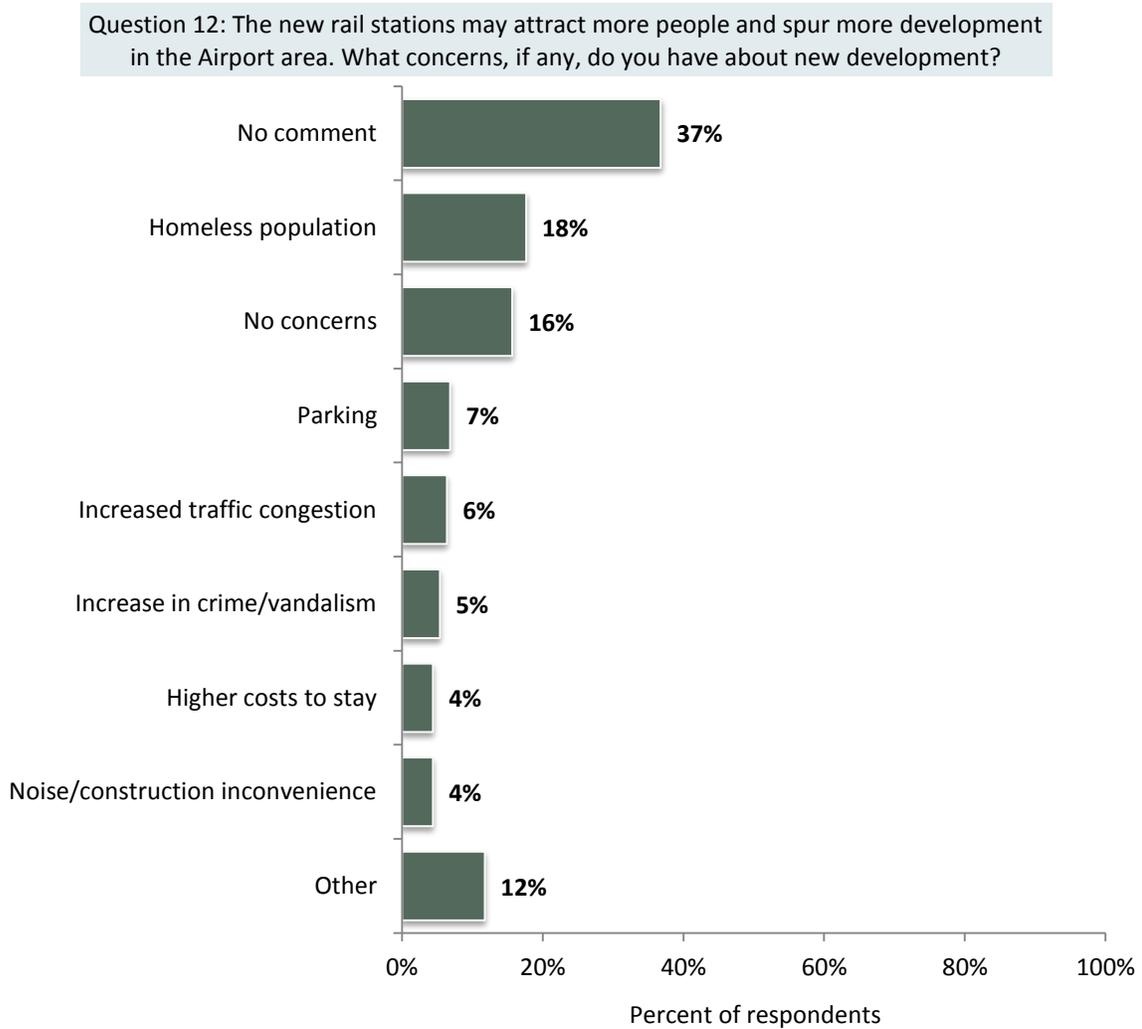


Figure 19: Effect of New Rail Stations on Business



Respondents were asked what concerns they might have about the new rail stations and the development that may accompany them. Of the 204 employers who completed the survey, 37% had no comment, and 16% said they had no concerns. Of those with a concern (47%), the top concern was that more homeless people would come to the area. Others were concerned about not having enough parking and that traffic congestion would increase.

Figure 20: Concerns about Development

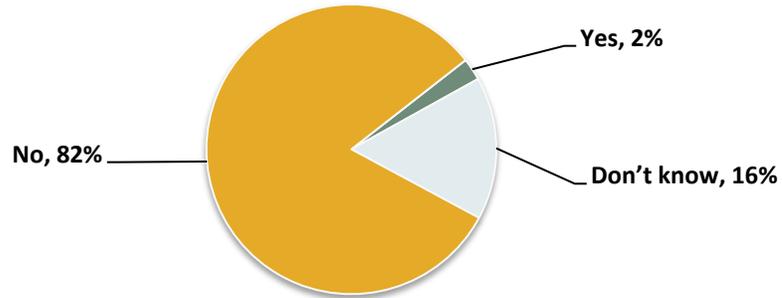


Verbatim responses for the “Other” category can be found in Appendix A: Results Including “Don’t Know” Responses

Most respondents had been located in the area for 20 years or more, and most had no plans to move. Only 2% of respondents said they were planning to move in the next two years, and 16% did not know if they would leave or stay. Most of those who were planning to move thought they would stay in the area.

Figure 21: Plans to Move

Question 13: Do you plan to move from your current location in the next two years?



Appendix A: Results Including “Don’t Know” Responses

Question 1: Please rate each of the following characteristics of the area around your office or facility’s location and the nearest rail station. (Please check one box for each line)						
	Excellent	Good	Fair	Poor	Don't know	Total
Cleanliness of public spaces (including streets/sidewalks)	5%	24%	45%	25%	1%	100%
	N=11	N=49	N=92	N=50	N=2	N=204
Availability of trash/recycling receptacles in public areas	4%	17%	24%	48%	7%	100%
	N=8	N=34	N=49	N=96	N=15	N=202
Presence of trees and other shade providing canopies	3%	18%	28%	47%	3%	100%
	N=7	N=36	N=57	N=95	N=7	N=202
Presence of sidewalks	8%	47%	33%	10%	1%	100%
	N=17	N=96	N=67	N=21	N=3	N=204
Condition of sidewalks	4%	33%	44%	17%	1%	100%
	N=8	N=66	N=89	N=35	N=3	N=201
Presence of cross-walks/crossing-lights	5%	34%	31%	28%	2%	100%
	N=11	N=69	N=63	N=57	N=4	N=204
Presence of bicycle paths and lanes	2%	11%	15%	57%	15%	100%
	N=5	N=22	N=31	N=116	N=30	N=204
Safety while bicycling	2%	6%	22%	53%	17%	100%
	N=5	N=12	N=45	N=107	N=34	N=203
Availability of bike racks/bike storage	2%	5%	11%	62%	21%	100%
	N=3	N=10	N=21	N=124	N=42	N=200
Presence of bus stops	7%	35%	38%	15%	6%	100%
	N=14	N=71	N=77	N=30	N=12	N=204
Frequency of buses for routes servicing this area	8%	32%	28%	12%	20%	100%
	N=16	N=65	N=57	N=25	N=40	N=203
Condition of bus stops	4%	24%	43%	16%	12%	100%
	N=9	N=49	N=87	N=32	N=25	N=202
Safety when waiting for buses	2%	25%	39%	15%	18%	100%
	N=5	N=50	N=79	N=31	N=37	N=202
Condition of local streets	2%	21%	42%	33%	1%	100%
	N=5	N=43	N=85	N=67	N=2	N=202
Traffic flow on local streets	2%	26%	45%	26%	1%	100%
	N=4	N=54	N=91	N=53	N=2	N=204
Safety during the day	3%	41%	47%	7%	2%	100%
	N=7	N=83	N=95	N=15	N=4	N=204
Safety at night	1%	10%	37%	39%	12%	100%
	N=3	N=20	N=76	N=80	N=24	N=203
Overall accessibility of neighborhood for employees/clients	3%	37%	46%	10%	4%	100%
	N=7	N=75	N=93	N=20	N=8	N=203

Question 2: Which, if any, of the following issues have had a negative impact on your business or your employees?					
	No impact	Somewhat negative impact	Very negative impact	Don’t know	Total
Flooding	44%	28%	21%	7%	100%
	N=89	N=56	N=43	N=14	N=202
Homelessness	12%	38%	45%	4%	100%
	N=25	N=77	N=90	N=9	N=201
Illegal dumping	23%	34%	34%	10%	100%
	N=46	N=67	N=68	N=19	N=200
Illegal parking	22%	38%	34%	6%	100%
	N=44	N=76	N=68	N=12	N=200
Vandalism	18%	35%	42%	6%	100%
	N=36	N=69	N=84	N=11	N=200
Unwanted odors	32%	32%	29%	6%	100%
	N=65	N=65	N=58	N=13	N=201
Unwanted noise	33%	44%	16%	8%	100%
	N=66	N=88	N=32	N=16	N=202
Vacant buildings/stores	41%	33%	16%	11%	100%
	N=82	N=65	N=31	N=22	N=200
Lack of connectivity (i.e. one way streets/dead ends)	59%	23%	9%	9%	100%
	N=118	N=46	N=17	N=18	N=199
Delays in traffic (slow speed or poor flow)	27%	42%	29%	2%	100%
	N=55	N=85	N=58	N=4	N=202
Excessive speed of vehicles on the road	36%	43%	17%	5%	100%
	N=71	N=86	N=34	N=9	N=200
Poor directional and way-finding signage	43%	42%	11%	3%	100%
	N=87	N=84	N=23	N=7	N=201
Lack of nearby parking	17%	34%	49%	1%	100%
	N=33	N=67	N=97	N=2	N=199
Poor/no sidewalks	48%	32%	16%	4%	100%
	N=96	N=63	N=31	N=8	N=198
Poor/no bus routes	47%	30%	16%	7%	100%
	N=94	N=60	N=31	N=14	N=199
Poor/no bike routes	39%	31%	19%	11%	100%
	N=78	N=61	N=37	N=22	N=198
Poor/no bike parking facilities	34%	33%	20%	14%	100%
	N=68	N=66	N=39	N=27	N=200
Vehicle size or weight restrictions	52%	23%	8%	17%	100%
	N=104	N=45	N=16	N=34	N=199
Other	9%	4%	43%	43%	100%
	N=2	N=1	N=10	N=10	N=23

Question 2: Other issues impacting business or your employees

- Abandoned Cars.
- Crime (theft).
- Enforce parking.
- Flooding on Altna St.
- Graffiti.
- Pacific transfer use public area as its working space, very negative!
- Police patrol.
- Rubbish/abandoned vehicles.
- Smoking.

Question 3: How would you rate your satisfaction with each of the following things related to your office or facility? (Check one box for each line)

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Don't know	Total
Lease/rent rate of your office/facility	20% N=39	46% N=91	20% N=39	11% N=21	5% N=10	100% N=200
Physical condition of your office/facility	24% N=49	46% N=93	19% N=39	9% N=18	1% N=2	100% N=201
Size of your office/facility	33% N=66	50% N=102	13% N=26	3% N=6	1% N=2	100% N=202
Location of your office/facility	53% N=106	41% N=83	3% N=7	1% N=2	1% N=3	100% N=201

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

	Very important	Somewhat important	Not important	Don't know	Total
Honolulu International Airport	36% N=72	34% N=68	29% N=59	1% N=3	100% N=202
Honolulu Harbor	18% N=35	30% N=59	49% N=97	3% N=6	100% N=197
Downtown Honolulu	22% N=43	36% N=70	42% N=82	1% N=2	100% N=197
Military bases	24% N=47	26% N=52	46% N=90	4% N=8	100% N=197
H1 Freeway	51% N=102	33% N=65	16% N=31	1% N=2	100% N=200

Question 5: How many vehicles are owned or leased by your business and parked or stored at this location?

None	N=17	9%
1 to 3	N=72	36%
4 to 9	N=54	27%
10 to 19	N=20	10%
20 or more	N=35	18%
Don't know	N=1	1%
Total	N=199	100%

Question 6A: About how many of your employees arrive at your facility or office using the following modes of transportation?				
	Most/many	Some/few	None	Total
Car (drive alone)	86%	10%	4%	100%
	N=172	N=20	N=9	N=201
Carpool or drop off	5%	44%	50%	100%
	N=11	N=89	N=101	N=201
Bus	10%	44%	46%	100%
	N=20	N=89	N=92	N=201
Bike	0%	20%	80%	100%
	N=1	N=40	N=160	N=201
Foot (walk)	2%	16%	82%	100%
	N=5	N=32	N=164	N=201
Handi-van	1%	8%	91%	100%
	N=2	N=16	N=183	N=201
Taxi	0%	9%	90%	100%
	N=1	N=19	N=181	N=201
Other mode	0%	3%	97%	100%
	N=1	N=6	N=194	N=201

Question 6B: About how many of your customers/clients arrive at your facility or office using the following modes of transportation?				
	Most/many	Some/few	None	Total
Car (drive alone)	88%	6%	5%	100%
	N=179	N=13	N=11	N=203
Carpool or drop off	10%	34%	56%	100%
	N=21	N=69	N=113	N=203
Bus	7%	30%	63%	100%
	N=15	N=61	N=127	N=203
Bike	1%	14%	85%	100%
	N=3	N=28	N=172	N=203
Foot (walk)	4%	17%	79%	100%
	N=8	N=35	N=160	N=203
Handi-van	2%	14%	84%	100%
	N=4	N=29	N=170	N=203
Taxi	4%	27%	69%	100%
	N=8	N=55	N=140	N=203
Other mode	1%	3%	96%	100%
	N=3	N=6	N=192	N=201

Question 7: What kind of parking is available to your business? (Check all that apply)		
Free customer parking in surface lot	N=136	68%
Free on-street parking	N=129	64%
Free employee parking in surface lot	N=129	64%
Paid employee parking in surface lot	N=25	12%
Free employee parking in garage	N=18	9%
Paid employee parking in garage	N=15	7%
Paid customer parking in garage	N=13	6%
Free customer parking in garage	N=12	6%
Paid customer parking in surface lot	N=8	4%
Metered on-street parking	N=4	2%
Total	N=201	100%

Question 8: If new development or redevelopment occurred near your location and/or the new rail station, which of these features would you most, or least, like to see?					
	Strongly want this	Somewhat want this	Not important for this area	No opinion	Total
Residential units	10%	14%	65%	10%	100%
	N=20	N=28	N=126	N=20	N=194
Senior or affordable housing	10%	14%	65%	11%	100%
	N=19	N=27	N=125	N=22	N=193
Workforce housing	9%	21%	59%	11%	100%
	N=17	N=40	N=115	N=22	N=194
Youth, community or senior centers	8%	16%	66%	10%	100%
	N=15	N=31	N=128	N=20	N=194
Higher building density (more buildings)	6%	8%	77%	9%	100%
	N=11	N=16	N=151	N=17	N=195
Higher building heights	5%	13%	72%	10%	100%
	N=10	N=26	N=139	N=19	N=194
Building façade/exterior improvements	22%	36%	32%	10%	100%
	N=42	N=71	N=63	N=19	N=195
More trees/landscaping	32%	38%	23%	8%	100%
	N=63	N=74	N=45	N=15	N=197
Improved lighting in public spaces	49%	39%	7%	6%	100%
	N=97	N=77	N=14	N=12	N=200
Better drainage/less flooding	42%	34%	14%	11%	100%
	N=82	N=66	N=28	N=21	N=197
More parking facilities	47%	37%	10%	6%	100%
	N=93	N=73	N=20	N=11	N=197
Better sidewalks or walking paths	38%	36%	17%	9%	100%
	N=75	N=72	N=33	N=18	N=198
Better bike lanes or paths	27%	29%	30%	14%	100%
	N=54	N=58	N=59	N=27	N=198
Improved bus service	28%	43%	15%	15%	100%
	N=55	N=84	N=29	N=29	N=197
Road repair and construction	51%	32%	10%	8%	100%
	N=101	N=64	N=20	N=15	N=200
Traffic flow improvements	46%	34%	15%	5%	100%
	N=91	N=68	N=29	N=10	N=198
New parks or plazas	19%	33%	37%	11%	100%
	N=38	N=64	N=73	N=21	N=196
Improvements to Keehi Lagoon Park	35%	34%	16%	15%	100%
	N=69	N=66	N=32	N=29	N=196
Other	21%	0%	7%	72%	100%
	N=6	N=0	N=2	N=21	N=29

Question 8: Other preferred features

- Homeless vandalism decrease.
- Rubbish removal abandoned, expired vehicles tires, junk removal.
- No smoking in public.
- Security.

Question 9: Which types of new businesses would you most like to see move into your area to help meet your business’ or employee’s needs?					
	Strongly need	Would like	Don’t want	No opinion	Total
Restaurants/coffee shops	38%	44%	11%	7%	100%
	N=77	N=89	N=22	N=14	N=202
Bars or night clubs	4%	5%	80%	12%	100%
	N=7	N=9	N=157	N=24	N=197
Convenience stores, (e.g., 7-11)	25%	49%	15%	11%	100%
	N=50	N=97	N=30	N=21	N=198
Grocery stores	17%	41%	25%	17%	100%
	N=33	N=81	N=50	N=34	N=198
Drug stores (pharmacies)	16%	38%	26%	20%	100%
	N=31	N=75	N=52	N=40	N=198
Gas stations	36%	38%	15%	11%	100%
	N=73	N=78	N=30	N=23	N=204
Beauty salons (hair, nails, barbers)	3%	25%	46%	26%	100%
	N=6	N=49	N=90	N=51	N=196
Banks	12%	45%	23%	21%	100%
	N=24	N=90	N=45	N=41	N=200
Hotels	7%	22%	51%	20%	100%
	N=14	N=44	N=100	N=40	N=198
Medical clinics/dentists	9%	38%	32%	22%	100%
	N=18	N=75	N=64	N=43	N=200
Child day care	11%	33%	29%	27%	100%
	N=21	N=65	N=58	N=54	N=198
Schools	7%	14%	53%	26%	100%
	N=14	N=28	N=105	N=52	N=199
Sports facilities (gyms, etc.)	13%	31%	32%	23%	100%
	N=26	N=62	N=64	N=46	N=198
Other	14%	5%	14%	68%	100%
	N=5	N=2	N=5	N=25	N=37

Question 9: Other types of new businesses

- Community Center.
- Designating smoking locations.
- Grocery Store.
- Parking structure.

Question 10: How strongly do you support or oppose redevelopment efforts in the area surrounding your location?		
Strongly support	N=44	22%
Somewhat support	N=102	51%
Somewhat oppose	N=20	10%
Strongly oppose	N=18	9%
Don’t know	N=16	8%
Total	N=200	100%

Question 11: Do you expect the new rail stations to have a positive, a negative, or no effect on your daily business?		
Positive effect	N=79	41%
Negative effect	N=39	20%
No effect	N=77	39%
Total	N=195	100%

Question 11A: Why? (i.e., reasons for expected POSITIVE effect on daily business).

- Access that avoids traffic or added traffic.
- All depends on the pick up/drop off points are located and utilized.
- Alternative transportation for employees.
- Another means of transportation for clients.
- Area redevelopment, airport improvement, Keehi Lagoon repurpose, eliminates homeless, commercial/residential mix use.
- As long as shuttles are available up and down Lagoon Drive, the shuttle will be positive.
- Better and easier commute.
- Better traffic.
- Better transportation for employees/clients.
- Better transportation.
- Convenience to airport, less traffic.
- Ease of reaching my office.
- Easier for customers to ride maybe.
- Easy access for those without transport.
- For transportation.
- Give commuters alternate transportation.
- Help with some of the west side traffic.
- Helps to relieve traffic.
- Hopefully improves traffic flow.
- Hopefully it cleans up area/crime will lessen with increased public traffic and police presence.
- Hopefully it will allow the workers in this industrial area to start riding rail & will result in less traffic on the H-1 & H-2.
- If it will improve traffic, it will be positive.
- Improved commuting options for employees.
- Improving community.
- Increased customer traffic.
- It could bring more business.

- Keep light industrial.
- Less cars on road, less traffic congestion.
- Less cars on road.
- Less traffic coming in from the west side.
- Less traffic on road in the area.
- May alleviate excess traffic & cars parked on the street.
- Might use it.
- More options/modes of transportation.
- More people traffic less danger?
- More walk-in customer.
- Positive - One more chance for getting to work. Negative - Industrial area & business may create new problem for us.
- Redevelopment of area will take it from poor/rundown to modern & appealing to eye.
- Safety purposes, and too (crime related).
- This is a high traffic area for trucking so hopefully will reduce auto traffic for safety purposes.
- Transport people to work from the west side.
- Transportation for families/employees living on the west side.
- Transportation is the most important for travelers.
- Will give employees other option to commute.

Question 11A: Why? (i.e., reasons for expected NEGATIVE effect on daily business).

- Additional traffic.
- Area is already congested.
- Clients will probably not use.
- Construction delays.
- Construction disruption, noise, traffic.
- Constructions increase in rent.
- Create traffic in our area.
- Don't think it will have more people not driving.
- Had to close my business because of the rail.
- Homeless will occupy.
- Homeless.
- Increase in traffic.
- Increased traffic and re-directed traffic.
- It will be difficult or may be impossible to maneuver 40-foot containers in the area.
- It will impact on street parking and traffic.
- It would be too noisy, especially if the offices are close (under 25') to the rail.
- Losing part of lot & bad design location of column in middle entrance.
- Loss of airport industrial space – less available space - higher rent.
- More traffic.
- Most employees will continue to drive & clients are dropped off or use taxi.
- No flow through of traffic.
- Not user friendly, i.e. luggage & seating configurations.
- Plan takes a part of existing building disruption.
- Road construction during build/traffic.
- Tear up the roads for years. Too far away for customers, if they have riders.

- The construction will take customers longer to get to our location.
- Too few will use it. Bus is better. Add buses.
- Traffic in the area will increase. Large container trucks already block traffic throughout the day.
- Traffic will increase for a system that will not be utilized by our employees or customers.
- Will reduce our business. Increase our taxes.

Question 11A: Why? (i.e., reasons for expected NO EFFECT on daily business).

- Air gauge.
- Business is not dependent on rail, does not deal w/ general public that much, more commercial.
- Cannot be foreseen.
- Construction materials need construction vehicles.
- Customers need a vehicle to deal with us.
- Don't believe enough riders will use it.
- Don't know.
- Everyone wants their neighbor to ride rail so they can drive.
- Far away.
- Home business.
- It going to be the same as it is.
- Jet Air Charter.
- My business caters to a particular type of customer. Not the general public.
- My business is not conducive for rail commuters.
- No effect unless rail users park their vehicles in our area where parking is already scarce, then it would be a negative impact.
- No increase in customer sales.
- None. Will Rail buy local wholesale?
- Not close enough to where we are.
- Not close.
- On the road a lot.
- Our business is rolling trucks and people so we need cars and trucks, only a few could use rail.
- People taking the rail will not be dropping off samples for testing.
- The customer base at the school would not use the rail system.
- Too Far from this location.
- Very little ridership expected.
- We are in an industrial area.
- We don't have walk in traffic.
- We're a wholesaler, No retail.
- Wouldn't need to use rail.

Question 12: The new rail stations may attract more people and spur more development in the Airport area. What concerns, if any, do you have about new development?		
No concerns	N=32	25%
Homeless population	N=36	28%
Parking	N=14	11%
Increased traffic congestion	N=13	10%
Increase in crime/vandalism	N=11	9%
Noise/construction inconvenience	N=9	7%
Higher costs to stay	N=9	7%
Other	N=24	19%
Total	N=129	100%

Question 12: Other concerns

- ?
- Access to the station terminal.
- Already very crowded.
- Does the area have infrastructure ready for the increase?
- Don't know.
- Foot traffic that will pose safety risks.
- If over develop.
- Increase [?].
- It sucks.
- It will transform the light industrial and commercial area.
- Leave our building alone.
- May not be compatible with neighborhood.
- More shopping stores.
- Over Crowding.
- Please keep area clean.
- Run a 72,000 sq ft laundry line service > no foot [?] [?].
- Safe Public walking access once the people have disembarked the rail.
- Safety of the area.
- So, do not have to pay too much for a taxi.
- The rail station will not attract more people.
- This area needs a plan development!
- Traffic/Infrastructure - Plumbing/Electrical etc.
- Unknown.
- We will be not able to run our current business.

Question 13: Do you plan to move from your current location in the next two years?		
Yes	N=5	2%
No	N=164	82%
Don’t know	N=32	16%
Total	N=201	100%

Question 13A: Where do you anticipate moving?		
A new place in this neighborhood	N=3	60%
Another place in Honolulu	N=1	20%
Outside Honolulu, but on Oahu	N=1	20%
Outside Oahu	N=0	0%
Total	N=5	100%

Question 14: Which of the following best describes your organization? (Check all that apply)		
Services	N=104	52%
Retail/sales	N=52	26%
Construction	N=30	15%
Manufacturing	N=18	9%
Government	N=14	7%
Other	N=18	9%
Total	N=201	100%

Question 14: Other types of organizations

- AOA (N=1)
- Church (N=3)
- Condo (N=1)
- Education (N=2)
- Non Profit (N=2)
- Residential (N=1)
- Transportation (N=4)
- Trucking (N=1)

Question 15: Who are your primary customers?		
Individuals	N=106	53%
Other businesses	N=80	40%
Public institutions/government	N=13	7%
Total	N=199	100%

Question 16: How many employees are at this location?		
1 to 5	N=66	33%
6 to 10	N=36	18%
11 to 20	N=22	11%
21 to 50	N=39	20%
51 to 100	N=23	12%
101 or more	N=14	7%
Total	N=200	100%

Question 17: Do you rent or own your facility?		
Rent	N=151	76%
Own	N=48	24%
Total	N=199	100%

Question 18: When was your business established?		
Within the past year	N=2	1%
1-4 years ago	N=5	2%
5-9 years ago	N=11	5%
10-19 years ago	N=41	20%
20 or more years ago	N=143	71%
Total	N=202	100%

Question 19: In what type of building does your business operate? (Check all that apply)		
Warehouse	N=90	45%
Stand-alone structure	N=71	36%
2-4 story structure	N=48	24%
Single-story structure	N=39	20%
Suites	N=17	9%
5-7 story structure	N=7	4%
Other	N=17	9%
Total	N=200	100%

Question 19: Other types of buildings

- 12 Story structure. (N=1)
- 13 Story (N=1)
- 40 Story high rise. (N=1)
- Airline Hangar. (N=2)
- Airport (N=1)
- Airport Industrial Park Assoc. (AIPA). (N=1)
- Airport terminal (N=2)
- Condo (N=3)
- Containers. (N=1)
- Hangar (N=1)
- High rise Apartment. (N=1)
- Highrise 100+ units. (N=1)
- Multiple single story buildings. (N=1)
- School buildings (N=1)
- Shopping center. (N=1)
- Within Airport (N=1)

Appendix B: Results by Customer Type, Tenure, Building Type and Number of Employees

Results for select survey questions are compared by employer characteristics (customer type, tenure, building type and number of employees). Cells shaded grey indicate that the differences between groups are statistically significant ($p < .05$), tested with chi-square. Tests of statistical significance were not conducted for multiple response questions.

Number of Respondents in Each Category			
Employer characteristics		Number	Percent
Customer type	Individuals	N=106	53%
	Businesses or government	N=93	47%
	Total	N=199	100%
Tenure	Rent	N=151	76%
	Own	N=48	24%
	Total	N=199	100%
Building type	Warehouse	N=92	45%
	Multi-story	N=49	24%
	Other	N=63	31%
	Total	N=204	100%
Number of employees	20 or fewer	N=124	67%
	21 or more	N=62	33%
	Total	N=186	100%

Average Rating* of Characteristics of the Area by Customer Type, Tenure, Building Type and Number of Employees										
Question 1: Please rate each of the following characteristics of the area around your office or facility's location and the nearest rail station.	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Cleanliness of public spaces (including streets/sidewalks)	37	38	34	35	42	31	41	43	37	37
Availability of trash/recycling receptacles in public areas	25	30	20	24	29	16	30	35	26	22
Presence of trees and other shade providing canopies	26	30	20	23	33	18	28	35	25	26
Presence of sidewalks	51	51	51	50	54	50	56	49	52	51
Condition of sidewalks	41	41	41	40	44	39	45	42	41	39
Presence of cross-walks/crossing-lights	39	41	37	39	38	35	42	43	41	37
Presence of bicycle paths and lanes	17	18	16	18	15	16	18	19	19	13
Safety while bicycling	17	18	16	17	18	16	17	17	19	13
Availability of bike racks/bike storage	11	13	8	10	12	7	13	14	12	6
Presence of bus stops	45	50	40	44	49	42	47	50	48	41
Frequency of buses for routes servicing this area	48	53	42	48	50	47	49	48	50	44
Condition of bus stops	40	41	38	38	44	39	41	40	40	37
Safety when waiting for buses	39	42	35	36	48	37	46	37	40	37
Condition of local streets	31	35	27	29	37	26	40	32	33	26
Traffic flow on local streets	35	36	33	34	37	34	35	36	36	33
Safety during the day	47	45	49	45	52	45	51	46	48	45
Safety at night	23	25	21	21	30	16	30	29	23	22
Overall accessibility of neighborhood for employees/clients	45	46	44	44	48	46	49	41	47	40

*Average rating where 100=excellent, 67=good, 33=fair and 0=poor.

Percent Who Thought Issue has had a "Somewhat" or "Very" Negative Impact on their Business by Customer Type, Tenure, Building Type and Number of Employees										
Question 2: Which, if any, of the following issues have had a negative impact on your business or your employees?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Flooding	49%	47%	51%	51%	43%	55%	44%	44%	44%	61%
Homelessness	83%	82%	87%	85%	77%	90%	81%	75%	81%	89%
Illegal dumping	68%	67%	70%	66%	72%	71%	62%	66%	69%	69%
Illegal parking	72%	70%	74%	70%	74%	80%	67%	65%	71%	77%
Vandalism	76%	77%	77%	75%	81%	84%	67%	73%	76%	77%
Unwanted odors	61%	64%	60%	60%	64%	65%	50%	65%	59%	66%
Unwanted noise	59%	60%	60%	60%	60%	60%	54%	63%	56%	64%
Vacant buildings/stores	48%	42%	56%	53%	34%	54%	33%	51%	47%	54%
Lack of connectivity (i.e. one way streets/dead ends)	32%	31%	33%	34%	26%	29%	38%	30%	31%	30%
Delays in traffic (slow speed or poor flow)	71%	69%	73%	70%	72%	65%	69%	81%	65%	77%
Excessive speed of vehicles on the road	60%	66%	54%	60%	59%	53%	61%	69%	58%	66%
Poor directional and way-finding signage	53%	54%	53%	53%	55%	47%	54%	62%	50%	56%
Lack of nearby parking	82%	84%	79%	84%	81%	84%	83%	81%	82%	84%
Poor/no sidewalks	47%	49%	47%	47%	52%	41%	38%	64%	46%	49%
Poor/no bus routes	46%	44%	48%	47%	45%	40%	44%	56%	43%	49%
Poor/no bike routes	49%	48%	52%	48%	55%	46%	47%	56%	46%	56%
Poor/no bike parking facilities	52%	54%	52%	53%	53%	55%	45%	55%	50%	57%
Vehicle size or weight restrictions	31%	32%	30%	31%	30%	32%	23%	34%	29%	32%
<i>Percent "somewhat" or "very" negative impact</i>										

Average Rating* of Characteristics of the Area by Customer Type, Tenure, Building Type and Number of Employees										
Question 3: How would you rate your satisfaction with each of the following things related to your office or facility?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Lease/rent rate of your office/facility	59	60	59	56	67	54	73	57	60	56
Physical condition of your office/facility	62	63	61	57	78	57	71	64	60	62
Size of your office/facility	71	71	71	70	75	68	82	68	74	63
Location of your office/facility	83	81	84	81	88	83	86	79	82	84

**Average rating where 100=very satisfied, 67=somewhat satisfied, 33=somewhat dissatisfied and 0=very dissatisfied.*

Percent Who Thought it was "Somewhat" or "Very" Important to be Located Near by Customer Type, Tenure, Building Type and Number of Employees										
Question 4: Is it important to your business that you are located close to the following?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Honolulu International Airport	69%	71%	68%	68%	71%	61%	73%	76%	70%	65%
Honolulu Harbor	46%	44%	48%	42%	60%	60%	31%	38%	44%	47%
Downtown Honolulu	55%	55%	57%	53%	63%	57%	55%	54%	59%	52%
Military bases	49%	50%	47%	48%	52%	48%	53%	46%	47%	52%
H1 Freeway	82%	75%	91%	82%	81%	89%	73%	78%	83%	81%

Percent "somewhat" or "very" important

Number of Company Vehicles by Customer Type, Tenure, Building Type and Number of Employees										
Question 5: How many vehicles are owned or leased by your business and parked or stored at this location?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
None	9%	10%	8%	7%	9%	7%	11%	10%	10%	5%
1 to 3	36%	42%	30%	37%	34%	26%	45%	44%	48%	19%
4 to 9	27%	24%	29%	30%	19%	35%	17%	23%	28%	29%
10 to 19	10%	7%	14%	12%	6%	15%	11%	2%	8%	16%
20 or more	18%	16%	20%	13%	32%	16%	17%	20%	6%	29%
Don't know	1%	1%	0%	1%	0%	0%	0%	2%	0%	2%

Average Rating* of Frequency of Employee Travel Mode Use by Customer Type, Tenure, Building Type and Number of Employees										
Question 6A: About how many of your employees arrive at your facility or office using the following modes of transportation?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Car (drive alone)	91	87	94	91	89	93	86	90	87	98
Carpool or drop off	28	29	25	27	30	31	19	30	20	38
Bus	32	33	30	31	36	32	26	38	25	42
Bike	10	15	6	9	15	10	11	10	7	12
Foot (walk)	10	14	6	9	16	7	12	14	9	10
Handi-van	5	8	2	4	8	3	7	6	4	6
Taxi	5	6	4	6	4	5	5	5	5	4

*Average rating where 100=most/many, 50=some/few and 0=none.

Average Rating* of Frequency of Customer/Client Travel Mode Use by Customer Type, Tenure, Building Type and Number of Employees										
Question 6B: About how many of your customers/clients arrive at your facility or office using the following modes of transportation?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Car (drive alone)	91	90	94	92	89	96	90	85	90	95
Carpool or drop off	27	35	17	28	26	21	32	33	25	27
Bus	22	35	8	21	26	12	31	31	23	20
Bike	8	13	3	7	14	3	16	10	9	7
Foot (walk)	13	20	4	12	15	7	20	15	15	10
Handi-van	9	15	2	7	15	4	14	13	10	7
Taxi	17	26	8	17	17	10	23	24	15	18

**Average rating where 100=most/many, 50=some/few and 0=none.*

Parking Types Available by Customer Type, Tenure, Building Type and Number of Employees										
Question 7: What kind of parking is available to your business?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Free on-street parking	64%	65%	61%	59%	85%	74%	55%	57%	66%	64%
Free employee parking in surface lot	64%	58%	72%	61%	74%	74%	51%	61%	61%	74%
Free employee parking in garage	9%	7%	10%	8%	13%	9%	14%	5%	10%	10%
Paid employee parking in surface lot	12%	16%	9%	15%	4%	5%	20%	16%	9%	16%
Paid employee parking in garage	7%	7%	9%	9%	0%	2%	16%	8%	6%	7%
Metered on-street parking	2%	3%	1%	2%	0%	2%	2%	2%	2%	0%
Free customer parking in surface lot	68%	64%	71%	69%	63%	84%	59%	51%	64%	80%
Free customer parking in garage	6%	8%	4%	5%	9%	3%	10%	7%	7%	2%
Paid customer parking in surface lot	4%	6%	2%	5%	2%	1%	8%	5%	4%	3%
Paid customer parking in garage	6%	7%	7%	8%	0%	3%	12%	7%	5%	5%

Percent Who "Strongly" or "Somewhat" Wanted Development Features by Customer Type, Tenure, Building Type and Number of Employees										
Question 8: If new development or redevelopment occurred near your location and/or the new rail station, which of these features would you most, or least, like to see?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Residential units	24%	30%	17%	23%	27%	18%	29%	27%	19%	34%
Senior or affordable housing	23%	30%	13%	21%	29%	15%	33%	25%	19%	31%
Workforce housing	28%	28%	27%	28%	29%	25%	27%	33%	23%	37%
Youth, community or senior centers	23%	27%	17%	19%	35%	13%	37%	25%	19%	27%
Higher building density (more buildings)	13%	14%	12%	14%	13%	11%	14%	16%	10%	19%
Higher building heights	18%	16%	19%	19%	17%	16%	16%	21%	15%	26%
Building façade/exterior improvements	55%	49%	63%	60%	44%	61%	61%	43%	56%	55%
More trees/landscaping	67%	64%	72%	68%	69%	66%	67%	68%	65%	77%
Improved lighting in public spaces	85%	85%	88%	85%	88%	86%	84%	86%	85%	89%
Better drainage/less flooding	73%	71%	76%	74%	73%	73%	67%	76%	70%	81%
More parking facilities	81%	81%	82%	81%	83%	83%	84%	78%	81%	82%
Better sidewalks or walking paths	72%	75%	71%	72%	77%	71%	76%	71%	68%	79%
Better bike lanes or paths	55%	55%	55%	52%	67%	51%	63%	54%	52%	58%
Improved bus service	68%	67%	70%	68%	73%	64%	67%	75%	62%	77%
Road repair and construction	81%	78%	84%	80%	83%	84%	73%	83%	78%	84%
Traffic flow improvements	78%	76%	80%	77%	81%	77%	76%	81%	76%	81%
New parks or plazas	50%	55%	45%	50%	52%	46%	49%	57%	51%	48%
<i>Percent "strongly" or "somewhat" want this.</i>										

Average Rating* of Desire for New Types of businesses by Customer Type, Tenure, Building Type and Number of Employees										
Question 9: Which types of new businesses would you most like to see move into your area to help meet your business' or employee's needs?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Restaurants/coffee shops	70	68	73	70	67	71	76	63	65	78
Bars or night clubs	11	11	10	13	4	9	10	13	11	9
Convenience stores, (e.g., 7-11)	61	60	63	65	52	69	57	54	59	67
Grocery stores	50	51	48	48	54	49	51	50	47	55
Drug stores (pharmacies)	48	49	46	47	48	44	49	51	45	51
Gas stations	65	59	72	67	60	72	65	55	62	67
Beauty salons (hair, nails, barbers)	28	30	27	29	24	24	35	29	29	27
Banks	49	47	51	48	51	48	50	49	48	49
Hotels	29	26	31	33	15	29	29	28	27	28
Medical clinics/dentists	41	41	41	41	40	40	42	42	38	46
Child day care	42	41	42	42	40	40	45	42	38	45
Schools	25	28	21	25	26	21	29	29	28	18
Sports facilities (gyms, etc.)	42	47	36	41	41	34	51	46	43	37

**Average rating where 100=strongly need, 67=would like, 33=no opinion and 0=don't want.*

Support for Redevelopment Efforts by Customer Type, Tenure, Building Type and Number of Employees										
Question 10: How strongly do you support or oppose redevelopment efforts in the area surrounding your location?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Strongly support	22%	19%	26%	23%	22%	20%	31%	18%	19%	26%
Somewhat support	51%	58%	46%	48%	57%	49%	49%	55%	51%	54%
Somewhat oppose	10%	8%	11%	11%	4%	13%	6%	8%	8%	11%
Strongly oppose	9%	7%	12%	8%	13%	9%	12%	6%	12%	3%
Don't know	8%	9%	5%	9%	4%	8%	2%	13%	10%	5%

Average Rating* of Support for Redevelopment Efforts by Customer Type, Tenure, Building Type and Number of Employees										
Question 10: How strongly do you support or oppose redevelopment efforts in the area surrounding your location?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
How strongly do you support or oppose redevelopment efforts in the area surrounding your location?	64	66	64	65	64	63	67	65	62	70

**Average rating where 100=strongly support, 67=somewhat support, 33=somewhat oppose and 0=strongly oppose.*

Expected Effect of New Rail Stations on Daily Business by Customer Type, Tenure, Building Type and Number of Employees										
Question 11: Do you expect the new rail stations to have a positive, a negative, or no effect on your daily business?	All	Customer type		Tenure		Building type			Number of employees	
		Individuals	Businesses or government	Rent	Own	Ware-house	Multi-story	Other	20 or fewer	21 or more
Positive effect	41%	38%	44%	45%	28%	35%	48%	43%	40%	37%
No effect	39%	41%	37%	33%	57%	44%	32%	38%	38%	44%
Negative effect	20%	21%	19%	22%	15%	20%	20%	19%	22%	19%

Appendix C: Results by Proximity to Rail Station

Results for select survey questions are compared by which of the proposed rail stations is closest to the location of the organization. Cells shaded grey indicate that the differences between groups are statistically significant ($p < .05$), tested with chi-square. Tests of statistical significance were not conducted for multiple response questions.

Number of Respondents by Closest Station		
	Number	Percent
Pearl Harbor Naval Base	N=25	12%
Honolulu International Airport	N=47	23%
Lagoon Drive	N=131	65%
Total	N=203	100%

Average Rating* of Characteristics of the Area by Closest Rail Station				
Question 1: Please rate each of the following characteristics of the area around your office or facility's location and the nearest rail station.	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Cleanliness of public spaces (including streets/sidewalks)	37	60	41	31
Availability of trash/recycling receptacles in public areas	25	33	39	18
Presence of trees and other shade providing canopies	26	42	36	19
Presence of sidewalks	51	60	55	49
Condition of sidewalks	41	51	47	38
Presence of cross-walks/crossing-lights	39	57	43	35
Presence of bicycle paths and lanes	17	30	23	13
Safety while bicycling	17	33	22	12
Availability of bike racks/bike storage	11	12	21	7
Presence of bus stops	45	58	56	39
Frequency of buses for routes servicing this area	48	51	61	43
Condition of bus stops	40	48	45	37
Safety when waiting for buses	39	52	45	35
Condition of local streets	31	50	42	24
Traffic flow on local streets	35	49	35	32
Safety during the day	47	63	49	43
Safety at night	23	41	30	17
Overall accessibility of neighborhood for employees/clients	45	54	48	42

*Average rating where 100=excellent, 67=good, 33=fair and 0=poor.

Percent Who Thought Issue has had a "Somewhat" or "Very" Negative Impact on their Business by Closest Rail Station				
Question 2: Which, if any, of the following issues have had a negative impact on your business or your employees?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Flooding	49%	26%	28%	60%
Homelessness	83%	67%	81%	87%
Illegal dumping	68%	78%	55%	70%
Illegal parking	72%	70%	63%	75%
Vandalism	76%	83%	66%	79%
Unwanted odors	61%	61%	61%	61%
Unwanted noise	59%	65%	49%	62%
Vacant buildings/stores	48%	43%	43%	50%
Lack of connectivity (i.e. one way streets/dead ends)	32%	30%	38%	29%
Delays in traffic (slow speed or poor flow)	71%	61%	72%	72%
Excessive speed of vehicles on the road	60%	57%	67%	58%
Poor directional and way-finding signage	53%	48%	59%	52%
Lack of nearby parking	82%	74%	76%	86%
Poor/no sidewalks	47%	57%	43%	47%
Poor/no bus routes	46%	52%	35%	48%
Poor/no bike routes	49%	48%	52%	48%
Poor/no bike parking facilities	52%	57%	50%	52%
Vehicle size or weight restrictions	31%	23%	33%	31%

Average Rating* of Characteristics of the Area by Closest Rail Station				
Question 3: How would you rate your satisfaction with each of the following things related to your office or facility?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Lease/rent rate of your office/facility	59	73	67	54
Physical condition of your office/facility	62	68	61	62
Size of your office/facility	71	69	74	71
Location of your office/facility	83	81	86	82
<i>*Average rating where 100=very satisfied, 67=somewhat satisfied, 33=somewhat dissatisfied and 0=very dissatisfied.</i>				

Percent Who Thought it was "Somewhat" or "Very" Important to be Located Near by Closest Rail Station				
Question 4: Is it important to your business that you are located close to the following?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Honolulu International Airport	69%	60%	87%	64%
Honolulu Harbor	46%	36%	43%	50%
Downtown Honolulu	55%	44%	64%	55%
Military bases	49%	60%	45%	47%
H1 Freeway	82%	80%	81%	83%

Number of Company Vehicles by Closest Rail Station				
Question 5: How many vehicles are owned or leased by your business and parked or stored at this location?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
None	9%	16%	7%	8%
1 to 3	36%	48%	43%	31%
4 to 9	27%	24%	24%	29%
10 to 19	10%	8%	7%	12%
20 or more	18%	4%	17%	20%
Don't know	1%	0%	2%	0%

Average Rating* of Frequency of Employee Travel Mode Use by Closest Rail Station				
Question 6A: About how many of your employees arrive at your facility or office using the following modes of transportation?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Car (drive alone)	91	91	90	90
Carpool or drop off	28	20	27	29
Bus	32	30	37	31
Bike	10	9	11	11
Foot (walk)	10	13	14	9
Handi-van	5	4	7	5
Taxi	5	0	7	6

**Average rating where 100=most/many, 50=some/few and 0=none.*

Average Rating* of Frequency of Customer/Client Travel Mode Use by Closest Rail Station				
Question 6B: About how many of your customers/clients arrive at your facility or office using the following modes of transportation?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Car (drive alone)	91	81	93	93
Carpool or drop off	27	19	34	26
Bus	22	15	35	19
Bike	8	15	10	7
Foot (walk)	13	12	20	10
Handi-van	9	6	13	8
Taxi	17	4	27	16

**Average rating where 100=most/many, 50=some/few and 0=none.*

Parking Types Available by Closest Rail Station				
Question 7: What kind of parking is available to your business?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Free on-street parking	64%	78%	34%	73%
Free employee parking in surface lot	64%	57%	51%	70%
Free employee parking in garage	9%	9%	4%	11%
Paid employee parking in surface lot	12%	0%	32%	8%
Paid employee parking in garage	7%	0%	23%	3%
Metered on-street parking	2%	0%	2%	2%
Free customer parking in surface lot	68%	48%	51%	77%
Free customer parking in garage	6%	0%	11%	5%
Paid customer parking in surface lot	4%	0%	15%	1%
Paid customer parking in garage	6%	0%	17%	4%

Percent Who "Strongly" or "Somewhat" Wanted Development Features by Closest Rail Station				
Question 8: If new development or redevelopment occurred near your location and/or the new rail station, which of these features would you most, or least, like to see?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Residential units	24%	36%	34%	18%
Senior or affordable housing	23%	36%	30%	18%
Workforce housing	28%	48%	30%	24%
Youth, community or senior centers	23%	40%	34%	15%
Higher building density (more buildings)	13%	20%	19%	10%
Higher building heights	18%	28%	23%	14%
Building façade/exterior improvements	55%	40%	68%	54%
More trees/landscaping	67%	52%	74%	68%
Improved lighting in public spaces	85%	80%	87%	85%
Better drainage/less flooding	73%	68%	68%	75%
More parking facilities	81%	60%	89%	82%
Better sidewalks or walking paths	72%	64%	85%	69%
Better bike lanes or paths	55%	64%	64%	50%
Improved bus service	68%	60%	79%	66%
Road repair and construction	81%	64%	83%	84%
Traffic flow improvements	78%	64%	87%	77%
New parks or plazas	50%	48%	68%	44%

Average Rating* of Desire for New Types of businesses by Closest Rail Station				
Question 9: Which types of new businesses would you most like to see move into your area to help meet your business' or employee's needs?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Restaurants/coffee shops	70	57	74	71
Bars or night clubs	11	18	14	8
Convenience stores, (e.g., 7-11)	61	52	64	62
Grocery stores	50	49	62	45
Drug stores (pharmacies)	48	42	58	45
Gas stations	65	41	73	67
Beauty salons (hair, nails, barbers)	28	35	41	23
Banks	49	56	56	45
Hotels	29	18	47	24
Medical clinics/dentists	41	45	49	37
Child day care	42	52	46	38
Schools	25	37	33	20
Sports facilities (gyms, etc.)	42	51	50	37

**Average rating where 100=strongly need, 67=would like, 33=no opinion and 0=don't want.*

Support for Redevelopment Efforts by Closest Rail Station				
Question 10: How strongly do you support or oppose redevelopment efforts in the area surrounding your location?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Strongly support	22%	22%	39%	16%
Somewhat support	51%	48%	50%	52%
Somewhat oppose	10%	13%	4%	12%
Strongly oppose	9%	9%	2%	12%
Don't know	8%	9%	4%	9%

Average Rating* of Support for Redevelopment Efforts by Closest Rail Station				
Question 10: How strongly do you support or oppose redevelopment efforts in the area surrounding your location?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
How strongly do you support or oppose redevelopment efforts in the area surrounding your location?	64	63	77	60
<i>*Average rating where 100=strongly support, 67=somewhat support, 33=somewhat oppose and 0=strongly oppose.</i>				

Expected Effect of New Rail Stations on Daily Business by Closest Rail Station				
Question 11: Do you expect the new rail stations to have a positive, a negative, or no effect on your daily business?	All	Closest Station		
		Pearl Harbor Naval Base	Honolulu International Airport	Lagoon Drive
Positive effect	41%	29%	64%	34%
No effect	39%	63%	16%	44%
Negative effect	20%	8%	20%	22%