West Maui
Commuter Needs Survey
Today

- Survey overview
- Key results
- Next steps
Survey Overview
Overview

- 4 page travel survey
- Administered through employers
- 54 employers participated
- 2,433 surveys returned
- Response rate of 34%
- Sampling error ± 2.0%
## Participating Employers

<table>
<thead>
<tr>
<th>505 Front Street Shops</th>
<th>Kapalua Land Company</th>
<th>Nordic/PCL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlantis Submarines</td>
<td>Kapalua Resort Association</td>
<td>Old Lahaina Luau</td>
</tr>
<tr>
<td>Bank of Hawaii</td>
<td>Lahaina Galleries</td>
<td>Outback Steakhouse</td>
</tr>
<tr>
<td>C J's Deli &amp; Diner</td>
<td>Lahaina Intermediate School</td>
<td>Paki Resort</td>
</tr>
<tr>
<td>Chase 'n Rainbows Real Estate</td>
<td>Latatudes &amp; Adatudes</td>
<td>Prudential Maui Realtors, Inc.</td>
</tr>
<tr>
<td>Classic Resorts</td>
<td>Lowson &amp; Associates</td>
<td>Resort Quest at the Mahana</td>
</tr>
<tr>
<td>Coldwell Banker</td>
<td>Management Consultants</td>
<td>Ritz-Carlton Kapalua</td>
</tr>
<tr>
<td>Embassy Vacation Resort</td>
<td>Marriott Maui Ocean Club</td>
<td>Sands Of Kahana</td>
</tr>
<tr>
<td>Expeditions</td>
<td>Maui Clothing Co., Inc</td>
<td>Sheraton Maui Resort</td>
</tr>
<tr>
<td>Fidelity National Title Insurance Co.</td>
<td>Maui Jim's Sunglasses</td>
<td>Starwood Vacations</td>
</tr>
<tr>
<td>County of Maui Fire Department</td>
<td>Maui Kai Condominiums</td>
<td>Starwood Vacations – Ka’anapali Ocean Resort</td>
</tr>
<tr>
<td>Hawaiian Dredging</td>
<td>Maui Kleen Team</td>
<td>Starwood Vacations - Westin Maui</td>
</tr>
<tr>
<td>Hyatt Regency Maui Resort &amp; Spa</td>
<td>Maui Land &amp; Pineapple Company, Inc.</td>
<td>Sugar Cane Train Sullivan Properties Inc</td>
</tr>
<tr>
<td>John Pierre’s Studio</td>
<td>Maui Preparatory Academy</td>
<td>The Sultan Company</td>
</tr>
<tr>
<td>Ka’anapali Beach Hotel</td>
<td>Maui Theatre</td>
<td>Ufo Parasailing</td>
</tr>
<tr>
<td>Ka’anapali Beach Resort Association</td>
<td>Mauiian Hotel-Napili Beach</td>
<td>Water Source LLC</td>
</tr>
<tr>
<td>Ka’anapali Golf Courses</td>
<td>Media Systems Inc</td>
<td>Westin Ka’anapali Ocean Resort</td>
</tr>
<tr>
<td>Kaiser Permanente Medical Care</td>
<td>Napili Kai Beach Resort</td>
<td>Westin Maui Resort &amp; Spa</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Wharf Cinema Center</td>
</tr>
</tbody>
</table>
Company Report
Your Employees

26 Employers (> 20 responses)
Key Results
Where Our Employees Live

- West Maui, 59%
- Wailuku, 14%
- Kahului, 12%
- Kihei, 8%
- Paia, 1%
- Up Country, 6%
Where They Work

- Lahaina, 30%
- Kapalua, 10%
- Kahana, 6%
- Honokowai, 5%
- Kaanapali, 48%
Household Income

- $50,000 - $80,000: 29%
- $30,000 - $50,000: 23%
- < $30,000: 19%
- > $80,000: 29%
What They Do

- Housekeeping: 18%
- Restaurant: 15%
- Other: 15%
- Customer Services: 13%
- Hotel Management: 12%
- Facility Maintenance: 7%
- Retail: 7%
- Construction: 4%
- Reception: 4%
- Real Estate: 3%
- Education: 2%
How They Get to Work

- Drive Alone: 86%
- Carpool w/ Non-Workers: 15%
- Carpool w/ Workers: 6%
- Bus Transit: 3%
- Multiple Modes: 1%
- Walk: 1%
- Bike: 1%
- Other: 2%
Commute Distance

- Average Commute = 16 miles
- 35% commute > 25 miles
Length of Commute Trip

- Live on West Maui: 5.7 miles
- Live Elsewhere: 30.2 miles
Commute Travel Time

- Live on West Maui: 15 minutes
- Live Elsewhere: 56 minutes
Average Commute Speed

25 mph

Live on West Maui

32 mph

Live Elsewhere
Drive Alone %

- Live on West Maui: 75%
- Live Elsewhere: 68%
Carpool %

10% Live on West Maui

22% Live Elsewhere
Ride the Bus %

Live on West Maui: 1%

Live Elsewhere: 5%
Distance to Work/Drive Alone

- 9% walk to work

<table>
<thead>
<tr>
<th>Distance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 2</td>
<td>71%</td>
</tr>
<tr>
<td>3 - 4</td>
<td>80%</td>
</tr>
<tr>
<td>5 - 6</td>
<td>82%</td>
</tr>
<tr>
<td>7 - 9</td>
<td>74%</td>
</tr>
<tr>
<td>10 - 24</td>
<td>74%</td>
</tr>
<tr>
<td>&gt; 25</td>
<td>68%</td>
</tr>
</tbody>
</table>
Begin Commute Before 6:30 AM

- 21% Live on West Maui
- 61% Live Elsewhere
Safety
Commute Characteristics

By Household Income
Length of Commute Trip

- Bottom: 13.8 miles (20%)
- Top: 16.7 miles (30%)
Commute Travel Time

30 minutes (Bottom 20%)

32 minutes (Top 30%)
Average Commute Speed

28 mph
Bottom 20%

31 mph
Top 30%
Drive Alone %

- Bottom 20%
  - 63%
- Top 30%
  - 77%
Support for Multi-Modal Transportation
Commute Characteristics

By Job Type
Length of Commute Trip

19.4 miles
Housekeeping

13.7 miles
Restaurant

17.5 miles
Hotel Management

13.4 miles
Customer Service
Commute Travel Time

- Housekeeping: 36 minutes
- Restaurant: 25 minutes
- Hotel Management: 36 minutes
- Customer Service: 27 minutes
Carpool %

Housekeeping: 39%
Restaurant: 11%
Hotel Management: 8%
Customer Service: 8%
Cost of Commuting

By Place of Residence
Length of Commute Trip

- Live on West Maui: 5.7 miles
- Live Elsewhere: 30.2 miles
Cost of Commuting for Drivers

- Average self reported gas costs: $130 per month*
- But 33% pay more than $150 per month for gas*

*commute only
Monthly Cost of Gas
(Commute Only)

- Live on West Maui: $41
- Live Elsewhere: $216
## Driving Costs

<table>
<thead>
<tr>
<th></th>
<th>2005 Chevrolet TrailBlazer LS</th>
<th>2005 Dodge Caravan SXT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6-cyl. (4.3-liter)</td>
<td>6-cyl. (3.3-liter)</td>
</tr>
<tr>
<td></td>
<td>2WD 4-door sport utility</td>
<td>passenger van</td>
</tr>
</tbody>
</table>

### Operating Costs

<table>
<thead>
<tr>
<th></th>
<th>per mile</th>
<th>per mile</th>
</tr>
</thead>
<tbody>
<tr>
<td>gas</td>
<td>10.8 cents</td>
<td>8.9 cents</td>
</tr>
<tr>
<td>maintenance</td>
<td>5.3 cents</td>
<td>5.7 cents</td>
</tr>
<tr>
<td>tires</td>
<td>0.9 cents</td>
<td>0.6 cents</td>
</tr>
</tbody>
</table>

**cost per mile**

|           | 17.0 cents | 15.2 cents |

### Ownership Costs

<table>
<thead>
<tr>
<th></th>
<th>per year</th>
<th>per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>full-coverage insurance</td>
<td>$1,398</td>
<td>$1,130</td>
</tr>
<tr>
<td>license, registration, taxes</td>
<td>$435</td>
<td>$389</td>
</tr>
<tr>
<td>depreciation (15,000 miles annually)</td>
<td>$4,300</td>
<td>$3,755</td>
</tr>
<tr>
<td>finance charge (10% down; loan @ 6%/5 yrs.)</td>
<td>$891</td>
<td>$739</td>
</tr>
</tbody>
</table>

**cost per year**

|           | $7,024 | $6,013 |

**cost per day**

|           | $19.24 | $16.47 |

### Total Cost Per Mile

<table>
<thead>
<tr>
<th></th>
<th>per year</th>
<th>per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000 miles a year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>cost per mile x 10,000 miles</td>
<td>$1,700</td>
<td>$1,520</td>
</tr>
<tr>
<td>cost per day x 365 days</td>
<td>$7,024</td>
<td>$6,013</td>
</tr>
<tr>
<td>decreased depreciation***</td>
<td>-$950</td>
<td>-$925</td>
</tr>
</tbody>
</table>

**total cost per year**

|           | $7,774 | $6,608 |

**total cost per mile***

|           | 77.7 cents | 66.1 cents |
Total Monthly Cost of Commuting

- $500 - $700
  - Live on West Maui

- $700 - $900
  - Live Elsewhere
Housing Preferences
Top 3 Reasons for Not Living Closer to Work

- I like where I live now: 58%
- I live near family and friends: 23%
- West Maui is too expensive: 38%
Propensity: Moving to West Maui

I wish I lived closer to work for a shorter commute
48%

I would be “very likely” to move to West Maui if I could find a place there for similar amount of money
50%
Household Vehicle Ownership
Household Vehicle Ownership

- 81% of West Maui workers have a vehicle available for commuting
- Ratio of vehicles to persons in household: 0.91
Household Vehicle Ownership

- No Vehicle, 1%
- 1 Vehicle, 25%
- 2 Vehicles, 41%
- 3+ Vehicles, 33%
Top 4 Reasons for Driving Alone

I prefer the security of having my own car available in case of emergency 48%

I can get to work faster by driving alone than by bus 45%

I do not like being dependent on others for transportation 39%

I have irregular hours or work overtime 39%
Fuel Efficient Vehicles
Analysis

Leading Opportunities
Bus Route Logistics

Transfer required from Lahaina Islander to Ka‘anapali Islander
Buses arrives transfer point, as second bus leaves.
West Maui Transit Potential

- 59% live in West Maui
- 74% of these drive alone
- 72% of commute trips are < 6 mi
Carpooling Potential

- 39% of housekeepers already carpool
- Of those who carpool, the median number of carpool trips is 8/month
- 82% of employees came straight to work without making stops
Road Signs
Fact Sheet
Fact Sheet

1. 71% of employees drive alone to work

2. Of those who arrived to work between 7:00am and 7:30am, 12% took the bus, 26% carpooled and only 57% drove alone.

3. 35% of employees travel 25 miles or more each way.

4. 25% of employees are required to make off-site trips using their own transportation.
Fact Sheet

5. 48% of employees work in Kaanapali.

6. 28% of employees have second jobs.

7. 76% of drivers park for free.

8. Only 35% of those who take the bus, drive and park to access the bus. The others walk, bike or get dropped off.
Fact Sheet

9. 53% of employees don’t know where the nearest bus stop is from their house

10. Housekeepers were 4X times more likely than others to ride the bus
Next Steps
Develop Program Recommendations

- Identify best prospects for commuter assistance
- Describe program implementation measures
- Develop cost estimates
Bottom Line: Suggested Priorities

- Implement employer-assisted ridesharing (carpool & vanpool)
- Work with County to improve transit service, especially commuter routes
- Implement “guaranteed ride home”
- Build workforce housing in West Maui
- Complete Lahaina Bypass
- Improve road connectivity in Lahaina
Mahalo