WAILUKU PARKING AND EVENTS FACILITY

PROGRAMMING FEASIBILITY ASSESSMENT

DRAFT

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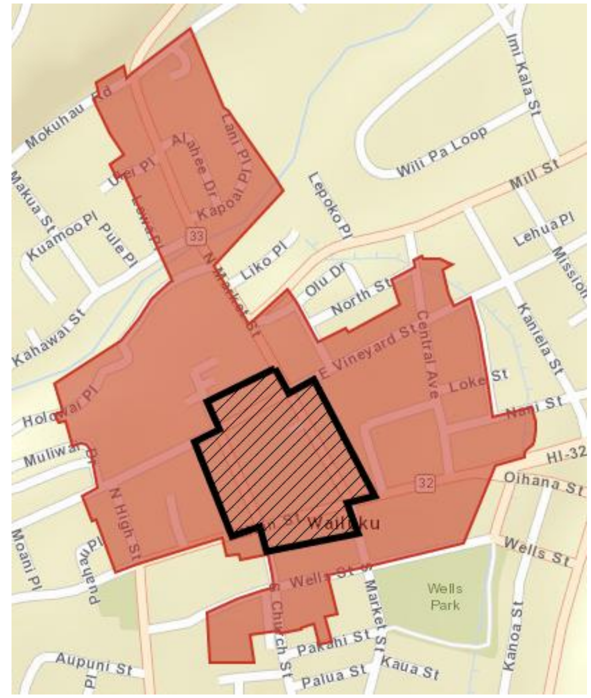
INTRODUCTION

The Wailuku Parking and Events Facility (PEF) is part of the reWailuku movement to remember, reimagine, and renew Wailuku Town Center. Wailuku Town Center follows the Maui Redevelopment Agency (MRA) district boundary, pictured to the right. The project site (or Superblock) is bound by Vineyard, Market, Main and Church Streets.



Maui Redevelopment Agency District; also known as Wailuku Town Center; PEF site in black. Source: ESRI

Through a multi-year visioning process that engaged the broad community, projects and priorities for Wailuku Town Center were identified. The need for more parking was widely expressed and seen as a barrier to new investment in the area. The PEF will address the need for more parking through a new parking garage. In addition, the project is expected to include additional buildings and uses that activate Wailuku Town Center.

The key question this report explores is, beyond parking, ***what programming elements are most viable and beneficial to include in the PEF project?*** Progressive Urban Management Associates (P.U.M.A.), a national economic development and community planning consultant, was hired by Maui Redevelopment Agency (MRA) to conduct a feasibility assessment to inform the programming and uses of the Parking and Events Facility.

P.U.M.A.'s process

P.U.M.A.'s process to complete the feasibility assessment, included:

- An update to the Wailuku Town Center Market Profile completed by P.U.M.A. in 2010.
- Site visit observations and inventory of existing facilities.
- Precedents research for parking facilities and programming.
- Community engagement involving focus groups, stakeholder interviews, an online survey and outreach activities at Wailuku First Friday.

PEF Site. Credit: reWailuku.org

Using the inputs above, P.U.M.A. identified feasible programming options for inclusion in the PEF. These options are summarized in this report. The report and its findings are intended to enable decision-makers to make informed selections of desired program elements. Their selections in turn inform the design of buildings to be included in the PEF project.

SUMMARY OF FINDINGS

P.U.M.A. explored a range of civic uses and other programming elements to complement the parking for the Wailuku Parking and Events Facility project. Potential program elements were evaluated based on market demand, community input, site observations, past precedent research and collaboration with the project team. Additional considerations included uses that can add activity and vitality, uses that meet a community need, whether the private sector can deliver the use, the size and scale, and – importantly – the additional parking demand generated.

VIABLE PROGRAM ELEMENTS

Many potential uses were suggested and evaluated for inclusion in the project. Among those, many were eliminated while a number were found to be viable. The table below includes a range of program elements for which there a demonstrated need or demand, and that could realistically be incorporated into the project site.

County Government Uses	Community Services Uses	Market-Supported Uses
Uses that support County functions	Uses that support arts, culture and community	Uses with indicated market demand
• Real Property Tax and County one stop bill pay counter • County Hearing/Training/Meeting Room Facility • County MRA management offices • County high tech conference room	• Landscaped plaza/festival area with outdoor stage • Community programming classrooms • Community reception space and catering kitchen • Arts and Cultural/Children's Discovery Center • Wailuku Visitors Center • Food Trucks/Outdoor Market Area	• Independent restaurants; especially casual dining • Small, boutique hotel • Housing at affordable price points • Unique, local retail • Small office • Specialty food store

PROGRAM DECISION

Ultimately, decisions of what kinds of spaces to build and what uses to place within a County-financed project weighs many factors, including numerical calculations about time, dollars, and parking stalls, as well as more subjective factors about community desires and predicted activation potential. It is not the purpose of this report to recommend a single, optimal program. Rather it is to identify a range of feasible options, while eliminating concepts that, however popular, were found unlikely to be viable.

DESIGN FLEXIBILITY

Despite careful consideration, uncertainty remains in predicting the success of a specific use. In many cases, the success of a program concept depends largely on the leadership and skill of the individuals that will execute it. In addition, market conditions in Wailuku Town Center are changing and will likely change further by adding parking. Finally, Wailuku exists within a larger island and market in which some uses may be developed elsewhere in the time it takes to finalize and construct the project. For all these reasons, the project design should strive to accommodate the desired program while remaining flexible to adapt to other possible uses. This is considered a best practice in an emerging and rapidly changing real estate market by many private sector real estate developers.

With many viable uses, and upcoming investments that are anticipated to improve market conditions at the site, it would be wise to develop flexible spaces that can adapt to accommodate a range of uses and future market conditions.

View of the PEF site from Church Street.

Community outreach at Wailuku First Friday.

STUDY INPUTS

To inform use options and the scenarios identified in the previous section, P.U.M.A. toured the PEF site and surrounding areas, collected market data, solicited input from community members, and researched parking and event facility precedents. Summaries of these inputs are provided in this section.

SITE OBSERVATIONS

During site visits, the P.U.M.A. team made the following observations related to programming and market potential of the Parking and Events Facility site and adjacent properties.

Economic Development Potential

- To maximize activity and economic development potential, the plaza /park element should be connected visually, physically and programmatically, to Market Street as much as possible.
- If more parking can be accommodated, it would further spur redevelopment and the office market. The potential to add more either now or in future phases will be important to Wailuku Town Center's economic development potential.

Grocery Retail and Restaurant Potential

- The site and surrounds, particularly the Calvary Church property, would be a great grocery/food market location.
- The strongest locations to develop restaurants are the corners of Main Street and Market Street due to both local traffic patterns and visitor traffic to ‘Iao Valley. The next strongest are the corners of Market Street and Vineyard Street; then along Market Street; and then along Vineyard. Church Street does not appear to be a viable location for restaurants in the current market cycle.
- A restaurant between the plaza area and Market Street (where the Public Defender's Office is currently a tenant and the Banyan Tree) would be an ideal use to connect Market street, ‘Iao square, and the proposed park/plaza, particularly with outdoor seating on or adjacent to the plaza.
- Properties on Market St. need grease traps in order to convert to restaurants but digging is too expensive. The project might be able to coordinate and encourage installation during construction excavation.

Addressing Safety Concerns

- Due to the existing safety concerns, the park/plaza will likely need heavy programming to get people comfortable using it. This can be reduced or offset if the first-floor tenants and adjacent uses attract a lot of foot traffic, particularly in the evening.
- The perception of safety in the park/plaza would be improved by clear sight lines from Main Street.
- The receivables counter (for RPT only or joint County facility) could create activity and security in a non-retail location such as on the park/plaza or on Church Street.

- It may be best if the public bus stop remains in its current location which is separated from the park/plaza; when waiting bus riders outnumber other users, they can worsen safety perceptions.

Adjacent Properties

- If there is any excess land area, the County could consider using it and other incentives to spur Armstrong or Public Defenders office property owner to redevelop in tandem with the project.
- The parking lot plus either the medical building or Armstrong property appears to have adequate area to accommodate the preliminary programming concepts; acquisition of both may not be necessary.
- Privately developed office or housing appears viable on the Armstrong property.

Other Observations

- The Festival Street concept (ability to easily close to traffic with gates or similar) may be less disruptive and better connect Market Street to the project site if developed on Pili Street rather than on Vineyard.
- Real Property Tax offices could potentially locate in the Takitani Building either as a long-term guaranteed lease or, if the parking height is unacceptable to Takitani, then through purchase of the property. This could reduce cost, and allow a higher parking structure/more intense site utilization.

Vineyard Street adjacent to the PEF site

View of the PEF site from Church Street

FACILITIES INVENTORY

During site visits, the P.U.M.A. team toured other Central Maui cultural facilities and meeting and event space to inventory existing assets. This inventory was evaluated along with community input to determine the need for additional performance venues, meeting space and reception space as part of the Parking and Events Facility. The facilities considered include the ʻIao Theater and plaza, Maui Academy of Performing Arts (MAPA), Maui Arts and Cultural Center (MACC), J. Walter Cameron Center, the Pono Center, Velma McWayne Santos (Wailuku) Community Facility, Central Maui Hotels and County of Maui facilities.

Key Findings

NEW INDOOR PERFORMANCE SPACE IS NOT IN HIGH DEMAND

Between Wailuku and Kahului, there are several performance venues, two of which, the ʻIao Theater and MAPA, are adjacent to the Parking and Events Facility site. Given the proximity of existing performance venues to the site and MAPA's planned expansion, a new indoor performance space is not recommended as part of the Parking and Events Facility. A need for more indoor rehearsal space was mentioned during the input process, however, it was also said that this space would need to be of performance quality. As a new indoor performance space is not recommended, a performance quality rehearsal facility is better suited elsewhere.

DEMAND FOR OUTDOOR PERFORMANCE VENUE.

Based on existing inventory and community input, there appears to be demand for an outdoor performance venue. The arts focus group in particular liked the idea of using an outdoor performance space as a place for rehearsals, script readings and other opportunities to share the creative process with the public. While the public plaza adjacent to the ʻIao Theater might be considered for this use, there are noise considerations related to coinciding productions at the Theater that must be taken into consideration.

LACK OF MEETING FACILITIES AND RECEPTION VENUES OFFERED AT A MID-TIER PRICE POINT.

Based on a tour of existing facilities, there is not a lack of meeting venues. However, input from business and property owner focus groups suggested unmet demand for a "mid-tier" facility, one with high-tech capabilities offered at a mid-tier price point. This facility would be in between the high-end offerings of hotels or the MACC and the very reasonably priced Wailuku Community Center, Cameron Center, or Pono Center. Some felt that the more affordable options needed upgrades, such as sound-proofing, to better meet their needs.

The MACC, Kahului

Similar to the desire for a mid-priced meeting space, demand was expressed for a mid-priced reception space that could accommodate outside catering. The MACC and hotels provide catering services in house and do not allow outside food and beverage services. This facility's cost and amenities would be somewhere in between what is offered by hotels and the MACC and the Wailuku Community Center. Community feedback was that events in Hawaii tend to be large, so the facility should have the ability to accommodate groups over 100 people.

COUNTY FACILITIES FOR MEETINGS, TRAININGS, AND HEARINGS IS NOT ADEQUATE.

The majority of County meetings, trainings, and hearings currently take place at the Planning Conference Room. It is evident that this facility is not meeting the need for certain functions. In particular, public hearings and community meetings can attract upwards of 100 people, which exceeds existing space capacity. This is a disservice to community members who must subsequently stand outside the meeting room where it is difficult to see or hear.

Performance Venues

- MAPA facility at 2027 Main Street - dance and drama classes and production storage
- MACC Omori Dance Studios (2) – dance classes, rehearsal space, auditions and acting classes
- Cameron Center theater and auditorium [Capacity 80 to 120]
- MACC McCoy Studio Theater [300 seats]
- ʻIao Theater/Maui OnStage [400-seats] - 50 mainstage and 12 youth performances; 8 Maui Chamber Orchestra concerts each year
- Kipuka Square Public Plaza - non-amplified only [outdoor plaza]
- Wailuku Community Center with stage and kitchenette and storage area [Capacity 500]
- MACC Castle Theater [1,200 seats]
- MACC Yokouchi Pavilion and Alexander & Baldwin Amphitheater [5,000 seat outdoor space]
- There are also small stages locally at the Queen Ka'ahumanu and Maui Malls where some community performances occur

MAPA recently acquired over 35,000 additional square feet in two buildings located at 2050 and 2020 Main Street, across the street from their existing facility. This new property will enable their expansion, which is planned to include a 150-seat black box theatre (Performance Garage), rehearsal studios, classrooms, productions spaces and administrative offices.

Meeting Space for Businesses

- Pono Center conference room [Capacity 10; free plus $150 deposit]
- Pono Center training room [Capacity 35; free plus $150 deposit]
- Wailuku Community Center [Capacity 500; $75/day]
- Cameron Center meeting room 1 [Capacity 12; $50 (non-profit) or $100 (for-profit)]
- Cameron Center meeting room 2 [Capacity 40; $85 (non-profit) or $160 (for-profit)]

- MACC Haynes meeting room [Capacity 50 to 100; 4-hour time blocks - $200 daytime/$225 nighttime (non-profit) or $275 daytime/$300 nighttime (for profit)]
- MACC Alexa Higashi meeting room [Capacity 50 to 100; 4-hour time block - $200 daytime/$225 nighttime (non-profit) or $275 daytime/$300 nighttime (for profit)]
- Courtyard Marriott (Kahului) Lokelani Boardroom [Capacity 12; $500/day or $150/hour]
- Courtyard Marriott (Kahului) Haleakala I & II [Capacity 20 to 50; $500/day]
- Courtyard Marriott (Kahului) Haleakala Ballroom [Capacity 64; $1,000/day]
- Maui Beach Hotel (Kahului) meeting rooms (4) [Capacity 30 to 40; $150 to $175 per 4 hours]

Meeting Space for the County

This inventory does not include a number of small rooms within County departments that can host a dozen or fewer people.

- County of Maui Council Chamber [Capacity 250; Seating 114]
- County of Maui Planning Conference Room [Capacity 60 but less in reality given configuration]
- County of Maui Service Center training room (At Real Property Tax offices, Maui Mall) [Capacity 30]

All existing County meeting rooms are not available to the general public or for any meetings after business hours unless the meeting pertains directly to the function of the department that manages the room.

Reception Spaces

- Wailuku Community Center with kitchenette and stage [Capacity 500; $75/day]
- Courtyard Marriott (Kahului) Haleakala Ballroom [Capacity 64; $1,000/day]
- Cameron Center theater, auditorium and kitchen (no food prep; for serving use only) [Capacity 80 to 120]
- Maui Beach Hotel (Kahului) banquet room [Capacity 300; $1,500/day]
- MACC Morgado Hall [Capacity 100+; $500/day]
- MACC Haynes meeting room [Capacity 50 to 100; 4-hour time block - $200 daytime/$225 nighttime (non-profit) or $275 daytime/$300 nighttime (for profit)]
- MACC Alexa Higashi meeting room [Capacity 50 to 100; 4-hour time block - $200 daytime/$225 nighttime (non-profit) or $275 daytime/$300 nighttime (for profit)]

Wailuku Community Center Reception Space

MARKET PROFILE SUMMARY

P.U.M.A. conducted a stand-alone *2017 Market Profile* for the Wailuku Town Redevelopment Area to help inform PEF programming recommendations. Included were evaluations of each market sector, and how local market conditions and demographics have changed since 2010 (P.U.M.A. initially developed a Market Profile in 2010 as a part of a Redevelopment Area planning effort). The following summary highlights the six major findings that were identified during this process. **The full Market Profile can be found in the Appendix.**

1. ***Wailuku Town Redevelopment Area market fundamentals have seen little change since 2010***

While Maui as a whole has experienced steady population growth, booming tourism, and rapidly rising cost of living, market conditions in the Redevelopment Area have remained largely unchanged over the last seven years. Simply, the rising tide on Maui is not lifting all boats. In the Redevelopment Area, there has been no population growth, as households have been getting older and smaller. Income has been stagnant and unemployment has been rising. There has been no significant new housing development and the existing building stock is aging and largely unimproved.


Existing retail on Market Street

Therefore, in-place residents are creating little market demand, and to fully realize market potential, the Redevelopment Area needs to capture energy from others beyond the local residential population. The Redevelopment Area remains an employment hub for the region, with a daytime population that is 400% larger than its residential population thanks to an influx of nearly 2,000 workers. This large daytime population is a major driver of market demand and remains a strength for the Redevelopment Area.

2. ***Demand for construction of new housing at affordable price points***

Maui County is in the midst of a housing affordability crisis. It is one of the ten least affordable counties in the nation, with median single-family home prices pushing toward $800,000. Housing continues to be built across the island in an effort to keep up with demand – a projected 14,000 new units will be needed by 2025 – but the lack of inventory remains a cause of skyrocketing costs. Furthermore, this new housing is not being built in the Redevelopment Area, which has only seen 4% growth to its housing stock since 2010. As the county continues to get more expensive, there will be demand for housing (particularly at affordable price points) in the Redevelopment Area, given its relative affordability, central location, and proximity to jobs.

3. ***Demand for construction of new niche lodging***

Tourism is Maui's leading economic sector and is currently at record levels of arrivals and visitor spending. While much of the lodging is clustered in resort areas, the new Courtyard by Marriott in Kahului proves support for additional lodging in central Maui. The Courtyard has daily rates in the $200s along with healthy occupancy. Other than its convenient location near the airport, the Wailuku Town Redevelopment Area is a more appealing environment for visitors, given its historic character, walkability, and local ambiance. However, the Redevelopment Area's existing lodging options are limited to only a few budget hostels and bed & breakfast inns. Given that a majority of new lodging in Maui has been resort-based, the Redevelopment Area has the ability to fill a lodging niche that is currently underserved on the island. There are limited options for business travelers, non-families (i.e., millennials or baby boomers), and extended stay visitors. The Wailuku Town Redevelopment Area is a strong location for a small, boutique hotel (with fewer than 100 rooms) catering to these users. Current obstacles to building new lodging are inadequate infrastructure, a lack of parking, and small parcel sizes.

4. ***Retail demand to fill, if certain barriers are removed***

Central Maui currently has a soft retail market. However, this has largely been driven by a number of big box vacancies and relocations. The Redevelopment Area's retail conditions have slightly improved since 2010. There has been modest growth in the number of spas and salons, restaurants, specialty boutiques, and art galleries; however, the number of vacant units has remained the same. The vacancy rate currently sits at 14%. There are several code and compliance barriers, as well as a building stock in need of general improvements, that prevent new retail (in particular restaurants and bars) from locating in the Redevelopment Area. If these can be resolved, the Area has the ability to serve a variety of users: the daytime population, visitors, cultural event attendees, and local residents. The Wailuku Town Redevelopment Area is authentic and not manicured, and new retail needs to be a reflection of this. Given the factors listed above, the majority of demand is for new local and independent restaurants, especially more casual dining which can serve daytime, residential, and visitor populations, at all income levels. Secondarily, there is also modest potential for leisure shopping and specialty food from locals, and further support potential from visitors.

Office/retail space for rent on Market Street

5. ***Office demand to fill, if certain barriers are removed***

Maui has been experiencing a soft office market over the past several years. Wailuku's office vacancy was 16% in 2016. However, the Wailuku Town Redevelopment Area is in a better position since it is an employment hub for the region, with strong anchor sectors in public administration and health care. Illustrating this, while the Redevelopment Area only makes up 2% of the Wailuku CDP's land mass (Census Designated Place), it accounts for 15% of its jobs and 18% of its businesses. The lack of available parking for businesses is the primary barrier preventing it from fully realizing demand. If this barrier is addressed, the Redevelopment Area can fill in existing office space with small businesses that are complimentary to the public sector, as well as small entrepreneurial and innovative businesses that are attracted to authentic and local environments with affordable lease rates.

6. *Demand to expand art & cultural offerings*

Arguably the most pronounced change in the Wailuku Town Redevelopment Area since 2010 has been the growing arts and cultural cluster: the 'Iao Theater's attendance has risen significantly over the past decade; the monthly First Friday event on Market Street has been established and continues to grow; Maui Academy of Performing Arts (MAPA) has plans to build a new black box theater; and the number of art galleries has tripled. There is demand for additional offerings to continue to grow this niche – particularly in theater and music. These would serve both locals and visitors, and would help further develop a brand for Wailuku as a whole.

(For more detailed information on the above market findings, see the stand-alone, *Wailuku Town Redevelopment Area 2017 Market Profile*.)

COMMUNITY ENGAGEMENT

P.U.M.A. engaged in a variety of outreach efforts to get feedback from community stakeholders regarding their desired outcomes and uses for the Parking and Events Facility. The majority of outreach was conducted during two site visits, February 27th through March 1st and April 4th through April 7th, 2017. Activities included one-on-one stakeholder interviews, facilitated discussions with focus groups, meetings with the MRA, Project Advisory Committee and Wailuku Community Association, and pop-up planning during the Wailuku First Friday event on April 7th. An online community survey was also administered.

Themes from Community Outreach

- Create flexible spaces that can be used for multiple purposes.
- Parking is needed across the board from employees to clientele, to residents and visitors.
- Enhance weekend and nighttime activity in Wailuku Town Center, through more restaurants, arts and cultural uses, children's programs etc.
- Enhance safety through project design and programming.
- Strengthen Wailuku as a place for locals; keep it affordable for locals.
- New amenities may induce additional parking demand; need a parking management strategy in addition to more spaces.

Focus Groups and Individual Interviews

A range of inputs such as one-on-one interviews, focus groups, and meetings of appointed officials are combined and summarized below by facility type.

MAUI COUNTY

Local government use is a community serving use by definition. In the time since the project was initially scoped, the FCA team has received clear direction to include, at a minimum, office space for the County's Real Property Tax office, which is currently located in Kahului. In addition, P.U.M.A. engaged other County division and department heads to discover what other needs exist and how they might be met within the project. The MRA, Councilmember & Budget Chair Hokama, and Mayor Arakawa also provided input to the team.

Desired Project Outcomes	*Desired Project Uses & Amenities*
• Resolve the longstanding parking deficit and consider additional supply to meet future needs. • Meet needs of the County as a whole, not just Wailuku. • Reinforce Wailuku as the seat and center of Maui County. • Support retention of County and State Civic uses, such as the judicial functions, which in turn anchor the professional office users in Wailuku. • Enhance and support economic development efforts in Wailuku Town Center. • Capture value from investments and economic development through adjacent property tax increases. • Incentivize property owners and businesses to make investments during the construction period.	• Office space for the Real Property Tax (RPT) Office. • A receivables facility that accepts payments for any/all County functions. • Training rooms that RPT and other departments can use with flexible size and arrangement. • A flexible hearing room for Boards and Commissions with capacity for up to 100 attendees, with interisland videoconferencing and telecommunications. • Bike parking and showering facilities. • Maui Bus stop. • Better emergency command center.

Concerns & Considerations

- County should not compete with or provide uses that the private sector can provide.
- The project shouldn't overwhelm the existing character of Wailuku Town Center with a massive structure.
- Take the minimum amount of property needed out of private hands and off the tax rolls.
- Limit the number of concessions or leases to private entities the County must manage.
- Cost and responsibility for how a plaza or park space would be managed and maintained.
- Restrict property owners and businesses from cutting into new roads for several years after the construction period.
- Emergency command center requires secured technology, reinforced design requirements, etc. This would constrain, if not entirely eliminate, the possibility of this space being shared with other uses; therefore, it would sit empty most of the time.

ARTS COMMUNITY

In 2010, the market-based plan for Wailuku Town Center identified a goal of strengthening the arts and creating an Arts & Entertainment District. An Arts & Cultural Plan for Wailuku has begun but is currently on hold due to funding availability. Wailuku is home to two of Maui's largest performing arts organizations – Maui Academy for Performing Arts (MAPA) and Maui On Stage at the ʻIao Theater. The ʻIao also hosts performances by other arts organizations including the Maui Chamber Orchestra. MAPA has recently acquired property within the Superblock between Main, Market, Church and Vineyard streets and will be developing a black box theater anticipated to open in 2018.

Desired Project Outcomes	*Desired Project Uses & Amenities*
• Enhance parking for theater patrons. • Increase the visibility and amount of arts in Wailuku (and other related desires from the in-progress Arts & Cultural Plan for Wailuku). • Make safe and inviting connections between parking and arts venues. • Help advance the brand and awareness of Wailuku Town Center as an arts & culture destination. • Enhance weekend and nighttime activity in Wailuku Town Center to encourage attendance and something for people to do (e.g., dining & drinking places) before and after shows. • Strengthen Wailuku as a place primarily for locals with offerings that appeal to and are accessible to locals.	• Informal, "neutral ground" performance space for community and arts groups with no permanent home. • Climate controlled rehearsal space with lighting and sound technology. • Climate controlled storage space for intermittent performers to keep bulky items in the run-up to performance (e.g., chairs, music stands, sound equipment). • Bathrooms for performers and audience, and changing rooms for performers. • Restaurants for people to go to before & after performances; more selection and ones that stay open on evenings and weekends.

Concerns & Considerations

- A space that isn't already heavily associated with or controlled by one arts organization.
- Potential for redevelopment of the Promenade to provide these facilities; diffusion of potential collaborative energy and partners if provided by the County.
- Differing and specific needs of various users (e.g., sprung floors for dancers).
- Redundancy or competition with existing, or in-development, venues in Wailuku Town Center: ʻIao, MAPA black box, and Kipuka Square
- What will happen to the Banyan Tree? Can it be retained?

BUSINESS COMMUNITY

Proximity to government services has made Wailuku the preferred location for many professional business offices on Maui, such as lawyers, accountants, and other financial services. Wailuku Town Center also has a cluster of retail shops on Market Street that form a basis for the activity and local patronage that many want to grow in Wailuku. Uses that could strengthen these businesses were explored.

DESIRED PROJECT OUTCOMES	DESIRED PROJECT USES & AMENITIES
• Add parking for employees. This is holding back office and other business investors. • Safe & convenient connections to the parking. • Add more office space in Wailuku Town Center with additional employee parking. • Add more activity and vitality to Wailuku Town Center. • Generate more commercial activity. • Explore ways for existing property owners to partner with developers that allow them to continue and increase steady income rather than selling off the family holdings. • Keep jobs/County offices in Wailuku Town Center.	• Parking. • Activating ground floor uses. • More dining options (including farmer's market/food stalls/food trucks). • Anything that attracts people to linger (e.g., spaces with active programming, community Wi-Fi, generate foot traffic at night, activities for youth). • High tech conference facility at a mid-tier price. • Arts-related uses (outdoors stage, movie screen, cultural emphasis). • Plaza with grass or another soft surface. • Bus stop. • Sidewalks on Vineyard. • More residential density. • Amenities for live/work (e.g. grocery store).

Concerns & Considerations

- Parking and impacts on retailers and restaurants during the construction.
- Massing that overwhelms the character of Wailuku Town Center.
- Meeting room needs are limited for businesses; they provide what they need or can afford to go to hotel facilities.
- Ensure local restaurants and retailers can continue to afford to be in Wailuku and are not priced out.
- County should not subsidize uses that would compete with their (retail) businesses.
- New amenities might induce additional parking demand, this should be considered when determining the number of spaces.
- Property owners need to reinvest in their properties to improve appearance.
- Does a parking structure fit a live/work vision for the future without cars?

CHEFS & CATERERS

The community wants more dining and drinking places in Wailuku Town Center and market demand data supports adding more. Wailuku Town Center is home to a few restaurants of which fewer have a liquor license. Many of the properties are constrained from meeting the criteria for acquiring a liquor license, such as adequate egress and sprinkler systems. Some restaurants proprietors have tried to purchase property in Wailuku Town Center but have been deterred by cost and inability to attract investors due to lack of parking.

Wailuku is also home to a number of caterers, including several that work out of the commissary kitchen in the Pono Center in Wailuku Town Center. A constraint for local caterers is that they are not permitted to cater at the hotels and lack other climate controlled venues that are accessible to locals.

Desired Project Outcomes	*Desired Project Uses & Amenities*
• Add parking for clientele. This is holding back potential restaurant investors. • Add more restaurants to achieve a strong cluster. • Assist restaurateurs to overcome property barriers such as lack of egress, lack of grease traps, unusually expensive tenant improvement needs, and property owners with limited ability to front such tenant improvements. • Keep restaurants oriented to and affordable to locals; keep rents affordable.	• Add more restaurants to achieve a strong cluster. • A reception space that local caterers could access, ideally with 300-person capacity. • A commercial/catering space attached to the reception space. • Cold food storage and freezer.

Concerns & Considerations

- Many locals' parties are big, so the ideal capacity for an additional facility would be from 500-to-1,000, such as those provided by community centers and hotels, but that does not appear to fit on this site.
- Reception space must be scaled to a realistic size for the available parking on nights/evenings.
- Ensure local restaurants can continue to afford to be in Wailuku and are not priced out.
- Must have a liquor license for the reception space.
- Keep rents affordable so that food can be affordable to locals.
- The best sites for restaurants, due to traffic patterns and visibility needed in an unproven market context, are the corners of Main & Market, not within the project site envelope. Secondary sites are on Market Street.

PROPERTY OWNERS

Property owners within Wailuku Town Center have made investments and may make further investments to coordinate with the project uses and timing. They and their tenants can be expected to suffer negative impacts during construction, which there is already concern about. Property owners ultimately can benefit from the project if it generates foot traffic and improves real estate demand and rents.

Desired Project Outcomes	*Desired Project Uses & Amenities*
• Add parking for employees and clientele. This is holding back leasing potential. The proposed number of parking spots (300) seems low. • Enhance weekend and nighttime activity in Wailuku Town Center to improve perceptions and enhance demand for space. • Evolve Wailuku Community Association into a stronger management association and perhaps business improvement district for Wailuku Town Center. • A focal point for the community that develops the Town's personality (walkable, arts, mom & pop).	• Parking. • Activating ground floor uses. • Arts or cultural uses that attract people to linger in Wailuku Town Center. • Car share and/or bike rental facilities. • The design is critical – should incorporate traditional Hawaiian themes (water, green walls) and elements for pedestrians (welcoming walkways, good lighting, seating, shade).

Concerns & Considerations

- Interim parking and impacts on retailers and restaurants during the construction. The risk is that by the time it is built it will have pushed out surrounding tenants and there is a parking structure with nothing around it.
- Blocking existing office owners' views.
- County should not be offering subsidized leases for the kinds of uses that would compete with their leasing or tenants.
- Meeting continually increasing parking needs.
- There is a need for parking management, not just more parking.

EDUCATIONAL & CHILDREN'S PROGRAMS

Many of the local education and arts groups that serve children on Maui have inadequate space. A children's museum or discovery center was an idea supported by the community in the reWailuku process. If developed, it would be a unique-to-Maui attraction. The idea has been advanced by several parties and some fundraising has occurred, but it does not have a venue and sadly is losing its on-island champion. Such uses would be ideal to activate Wailuku Town Center by drawing both locals and tourists primarily during off-peak hours for parking.

Desired Project Outcomes	*Desired Project Uses & Amenities*
• Provide a unique-to-Maui experience for families with multi-age exhibits and/or programs • Educate locals and tourists alike about Maui science and culture • Attract visitors and activity to Wailuku Town Center after school and on weekends • Provide a home for programs that currently operate in rented venues as availability permits • Collaborate to provide a diversity of offering	• A discovery center with changing, interactive exhibits • Classroom or program space available to multiple organizations • Storage space for rotating exhibit materials • Integrated outdoor spaces that extend learning and play • Spaces where messy activities can occur, with sinks and easy clean up • Office space for the tenant organizations

Concerns & Considerations

- There is no one entity ready to implement the discovery center concept at this moment
- If activated by multiple tenants, how will collaboration and possible conflict be managed? Some of the possible partner organizations have overlapping missions and interests; demand for classroom space could be a difficult scheduling challenge
- How much space would be occupied and could be tenanted this way is uncertain, so it is difficult to plan around
- This could tie into education and cultural interpretation of the ʻIao Valley
- Many of the organizations would still need other spaces and locations to serve other parts of the island. Administrative offices and storage could continue to be elsewhere with this space limited to programs and exhibits
- Uses would drive some daytime parking demand (afterschool by locals and rainy days by tourists) that would conflict with the daytime employee users
- If underutilized for exhibits and programs, some of this space could be used as rehearsal space and storage for intermittent performers

First Friday Event

During Wailuku Frist Friday on April 7, P.U.M.A., FCA and PBR Hawaii teamed up to offer a variety of activities to engage the public. P.U.M.A. invited people to participate in a "bucket exercise" meant to get feedback on what types of programming elements were more desirable. In the exercise, participants were each given three votes (plastic silver coins) and asked to put them in the buckets that indicated the programming elements they would most prefer to see as part of the Parking and Events Facility. There were nine prescribed choices, which included: Children's Museum, Plaza/Green Space, Food Trucks/Outdoor Market, Educational Activities, Outdoor Stage, Free Wi-Fi, Meeting/Training Room, Bike Parking/Repair, and Reception/Catering Kitchen. Plus, participants had the ability to provide other suggestions.

There were **236 participants** in total, equating to 709 votes. The programming elements with the most votes were as follows:

1. Children's Museum (153)
2. Plaza, Park or Green Space (121)
3. Food Trucks or Outdoor Market (111)
4. Educational Activities/Classes (90)
5. Outdoor Performance Stage (89)

Credit: PBR HAWAII

Community Survey

A community survey was administered between April 3 and May 8, 2017 and had 1,196 responses. **The full survey summary can be found in the Appendix.** Key survey findings include:

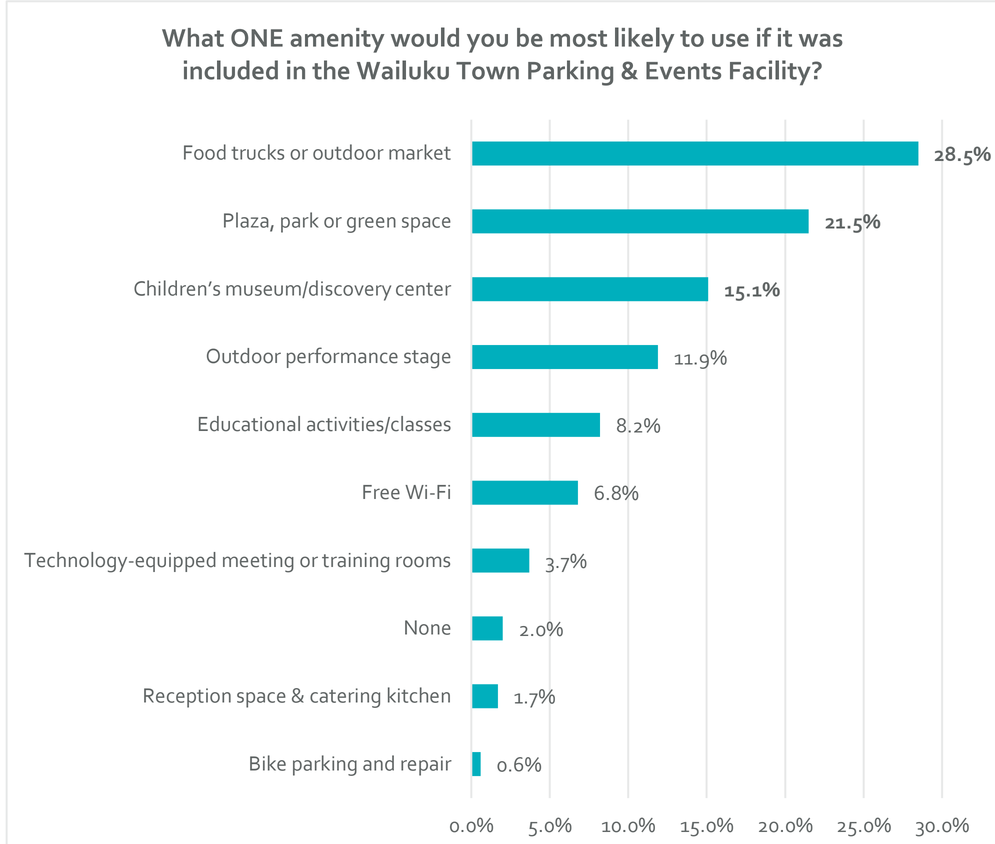
- The typical respondent was female, between ages 50-69, with an income between $50,000 and $99,000, and visits Wailuku Town Center once per week or more, by car, for personal business and spends 1-2 hours there.

- Preferences and use patterns for existing and future facilities were largely consistent among age groups, gender, income levels and interest(s) in Wailuku Town Center.

- The top three responses for the most desired amenity to add in Wailuku Town Center are **food trucks or outdoor market** (28.5%); **plaza, park, or green space** (21.5%); and a **children's museum or discovery center** (15.1%).

- The performance types respondents are most interested in are plays and musicals; pop or acoustic music; cultural programs; and children's/educational programs.

- The top three reasons respondents visit Wailuku Town Center are personal business; County/government business; and arts and cultural activities.

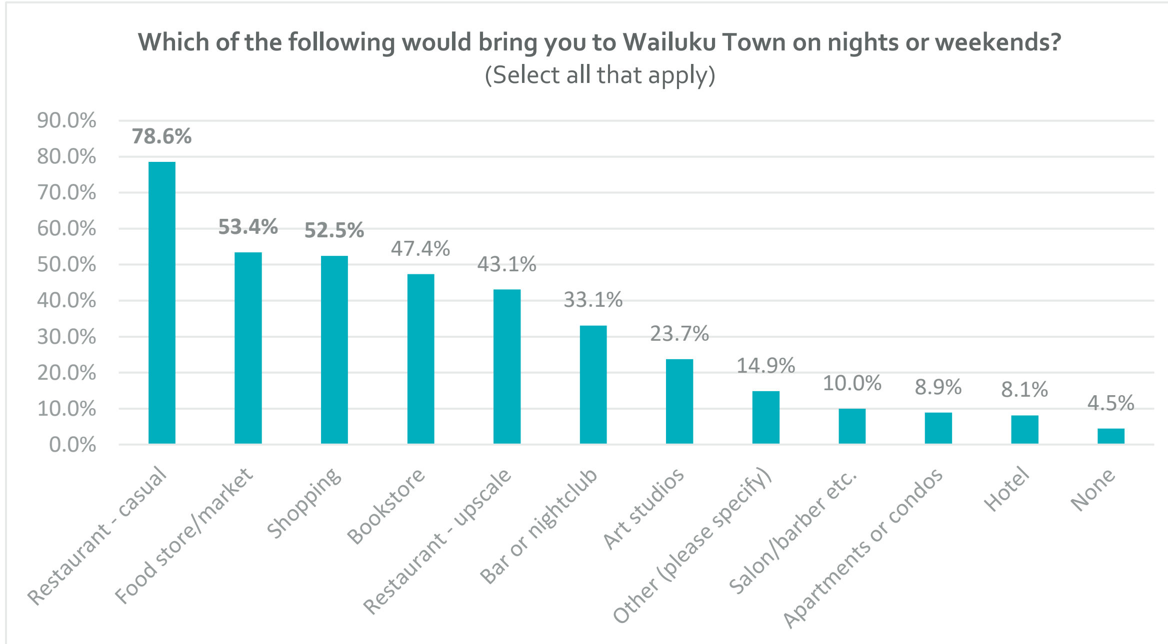


- Difficulty finding parking; lack of diverse retail; and traffic/congestion were the biggest reasons respondents did not visit Wailuku Town Center more often.

- When asked what amenities or uses would bring respondents to Wailuku Town Center on nights or weekends, the top three responses were: **restaurant - casual** (78.6%); **food store/market** (53.4%); and **shopping** (52.5%).

- Compared to the 2010 survey, respondents were more likely to use a personal vehicle to get to Wailuku Town Center and stay for less time once they arrive. It appears that the management strategies, such as the 2-hour parking limits recommended in the 2010 plan, have served the needs of people who want to visit for a short period of time.

- Other responses remained consistent, including frequency of travel to Wailuku Town Center, what amenities are used by respondents while in Wailuku Town Center, and how far respondents are willing to walk from where they parked to their destination.



PRECEDENTS RESEARCH

Precedent projects were considered for the Wailuku Parking & Events Facility. Examples considered were 1) public parking structures with additional community features such as an adjacent plaza or other gathering space and 2) multi-tenant non-profit arts & cultural organization centers.

Parking and Events Facilities

Summarized in the table below are projects identified as having the most programming similarity to the goals of the Wailuku Parking and Events Facility project. Each example includes the cost and management of the various components; uses; programming elements; and funding mechanisms. Subsequent research explored types of funding for various elements of the projects, such as the parking structure itself and additional community benefits like the plaza, bike parking, and similar.

Name/Location	Spaces/Cost/Management	Uses in/Adjacent to Structure	Programs	Funding Sources
Main Street Square Rapid City, SD,	560 on 3 levels - public metered parking on the first level, permit during day, free to public after 4pm and weekends	Public restrooms in structure and bicycle share– several retail/restaurant spaces across landscaped alley that doubles as festival space	200+ special events, arts and culture, live concerts, seasonal ice skating and interactive fountains	BID. Puts on over 200 annual events in/adjacent to plaza, can be booked for private events
Garfield Street Parking Garage & Center Hollywood, FL	400 spaces, 5 story (incl. roof) parking structure, $1.50 per hour	Adjacent to public park/beach, indoor/ outdoor community center houses public restroom, small paddleball pro-shop, a continuous balcony facing east and south and a 1,700-square-foot multipurpose community center room/banquet hall with support uses such as a kitchen, office, and restrooms	Community center/banquet hall available for rent (events, weddings) for a fee of $415 for 4 hours, Charnow Park has seating areas, picnic pavilions, playgrounds, and an interactive fountain	City owns and operates parking, parks and recreation manages the community center
Denver Botanical Gardens Denver, CO	325, 3 levels, 2 underground levels open to atrium w/ public art, free	Gardens (storm water capture, children's play area and "green roof", green wall)	Garage provides parking for Denver Botanical Gardens across the street, summer concert series, children's activities in the gardens on the roof, water demonstration	Denver bond initiative and private fundraising

Centennial Parking Plaza/Putnam Pointe Bend, OR	571-spaces, free parking for the first three hours or $5 per day	Affordable apartments, condos, solar panels, ground floor retail, Bend visitor center, post office, public restrooms, office - The parking garage was an existing structure, the mixed-use buildings were constructed around and one additional level of parking was constructed below	none	Parking garage owned and operated by City, New development was P3
Intermodal Transit Facility Hillsboro, OR	260,000 sq. ft., free parking, 5 stories, parking for nearby hospital and university staff on upper floor, and patients, daily commuters and short-term parkers on lower level, 800 vehicle spaces, and 85 bike spaces, 13 EV charging stations	Ground floor retail, education center, bicycle parking/facilities (incl. lockers, showers, repair space with tools), electric parking stations, pervious concrete alley adjacent, landscaped storm detention areas in adjacent public plaza across the street	Education center is part of university (Portland Community College), has updated classroom technology, wireless internet access, a testing room, a study room, classrooms and a computer lab	P3, City, hospital and university
Old Town Parking Structure Temecula, CA	$16M project. The entire project was funded by assessment district funds Free public parking, 3 stories, 462 parking spaces	The Old Town Parking structure in Temecula, CA is a key piece of the 5-acre $73 million civic center complex that houses City of Temecula Old Town Civic Center, retail shops, police station and visitor center as well and Town Square; an outdoor plaza with fountain and mosaic mural	Begin/end holiday bus tours at Old Town Parking Structure, winter ice skating rink in Town Square park	Assessment District funds, City owns and operates parking
Lowenstein Complex Denver, CO	230 free parking spaces for visitors to retail $16M project - $3.9M in dev TIF reimbursement from DURA	25,000 sq. ft. of ground floor retail, restaurant, movie theater as part of structure – additional 31,000 sq. ft. in adjacent book store – mini-esplanade connects the two buildings	Monthly summer concert series on roof of garage, variety of events in esplanade sponsored by SIE theater	CDBG, Historic Tax Credits, OED small business loan, private – Theater converted to book store, record store owner was also property owner
Parking Structure #6 Santa Monica, CA	11 levels, 744 spaces 90 min free, $1.25 for 2.5 hours, $1.85 for each additional 30 mins	30 free Electric Vehicle Charging Stations, Major Bicycle Hub, ground floor retail, storage space for farmer's market, LEED Gold Certification, unique exterior open-air stairs	none	Public, owned & operated by City

PROGRAMMING

The programming in or adjacent to these parking structure examples are typically run by the structure owner – either nonprofit organizations (i.e. Denver Botanical Gardens), Business Improvement Districts (Main Street Square Rapid City, SD), or in most cases by the municipal government.

FUNDING SOURCES FOR PARKING STRUCTURES

Many cities are seeking alternatives for funding and delivering parking structures. Due to costs that range from $20,000 to $35,000 per parking space, it is almost impossible for cities to fund structures in their entirety. Cities and counties must utilize third parties such as real estate professionals and developers. Institutions are having great difficulty generating the capital needed to finance parking structures as well. Below are a few methods for funding public parking structures.

Major Funding Mechanisms

- **Public-Private Partnership (P3):** P3's can include tax-exempt bonds, taxable bonds, municipal grants and property equity. The most common P3 model is the *lease-leaseback model* where a private party enters into a ground lease for a term longer than the lease. For example, a typical ground lease term for a parking garage is 35 to 40 years, while the typical term of the lease is 25 to 30 years. The private party designs, builds, and finances 100 percent of the project. The private party then leases the building—*in Wailuku's case, a parking structure*—back to the public entity. The public entity pays rent over the term of the lease. At the end of the lease, assuming all debt obligations have been met, the asset reverts back to the institution for a very small fee, which is typically $1.
- **Parking Revenue:** The parking structure can generate revenue from the parking system, including citations, visitor parking, special event parking, and monthly parking permits may have to be pledged towards the debt so that the deal can be financed. Alternatively, such funds are used to maintain and even program the structure.
- **Parking Districts:** Cities and counties may use *tax allocation districts* or similar mechanisms to provide the revenue stream that, when coupled with daily, monthly, and special event parking fees, generates the needed revenue for offsetting the debt and the operational expenses associated with a parking structure. In addition, when occupied space is included, institutions may use the rent as an additional form of revenue for making the deal work.

FUNDING SOURCES FOR COMMUNITY BENEFIT ELEMENTS

Wailuku is seeking much more than a typical parking structure for its Parking and Events facility. Below are some funding examples that other cities have used for community-oriented uses associated with parking structures.

Foundation Funding

National and local foundations provide grants that fund public realm improvements including walking and biking improvements, pedestrian safety, public art and public health.

Placemaking Grants

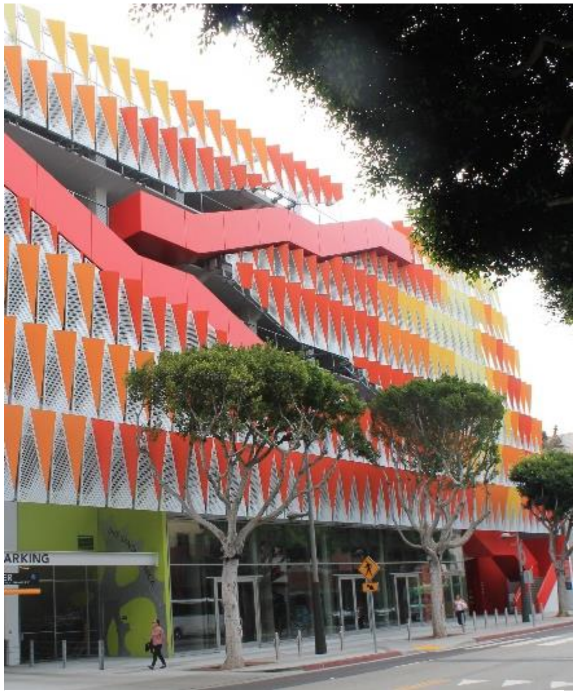
- ArtPlace America – National Grants Program provides $50k to $500k to support "creative placemaking" in a defined community such as a block.

- Project for Public Spaces Small Grants Programs provides grants that are focused on enhancing public spaces and highlighting local assets. Generally, awards range from $500 or less, up to as much as $10,000. Projects can involve youth programs, public art, community greening, clean-ups, park revitalization and stewardship.
- Funder's Network - Partners for Places Grant creates opportunities for cities and counties in the U.S. and Canada to improve communities by building partnerships between local government sustainability offices and place-based foundations. The grant program will provide partnership investments between $25,000 and $75,000 for one-year projects, or $50,000 and $150,000 for two-year projects, with a 1:1 match required by one or more local foundations.

Healthy Design Funding

Health funders increasingly recognize the benefits of a built environment that encourages activity. The fact that Wailuku Town Center is a blue zone and will be building awareness and programs would likely be seen as complementary. Some health foundations have supported bus shelters or other shade structures as part of cancer prevention initiatives.

- The Robert Wood Johnson Foundation funds a wide array of research and initiatives to help address pressing health challenges. They provide grants for planning and demonstration projects that feature qualities that make communities healthier, such as highlighted stairways on the exterior of the parking garage with paint markings to tell people how many steps they have climbed.
- Kaiser Permanente (KP) participates in Community Health Initiatives such as Healthy Eating Active Living (HEAL) collaboratives. While KP is not currently funding any HEAL projects in Hawaii, their programs continue to expand annually.
- The Environmental Protection Agency's (EPA) Office of Sustainable Communities provides Smart Growth Grants to support activities that improve the quality of development and protect human health and the environment.



Exterior pedestrian stairway in Santa Monica, CA

Bike Hub & Facilities Funding

- Federal Surface Transportation (STP) law provides flexibility to States and MPOs to fund bicycle and pedestrian improvements from a wide variety of programs. All major surface transportation funding programs can be used for bicycle and pedestrian-related projects. An 11.5% local match is required for these funds when used for bicycle projects.
- Congestion Mitigation and Air Quality Improvement Program (CMAQ) funds are available for bicycle facilities intended for transportation purposes. A local or state match is required for these funds.
- People for Bikes Community Grants provide up to $10,000 with a minimum 50% match to organizations and agencies seeking to support bike facilities and advocacy.

- The Federal Highway Administration provides funding for bicycle storage or service centers at transit hubs similar to the Santa Monica Bike Center described and illustrated below.
- The Santa Monica Bike Center has nearly 360 secure bicycle parking spaces. The full-service facility also includes rentals, attended bike valet, showers, lockers, self-service repairs, vending and restrooms. The bike center is near stops for many bus lines and is only one block away from the light rail terminus. Metro Transit provided $1.5 million in funding. The bike center is professionally operated by Bike and Park Santa Monica, a company with a mission to inspire people to ride bicycles for the benefit of one's health, spirit and planet.

Bicycle hub in Santa Monica, CA

Electric Vehicle (EV) Plug-ins

In June 2016, The Department of Energy (DOE) launched $22 million in funding to accelerate the development of plug-in electric vehicle use. As part of this funding opportunity, DOE seeks highly leveraged Alternative Fuel Vehicle Community Partner Projects that will significantly accelerate the use of light, medium, and heavy-duty vehicles that operate on fuels such as biodiesel, electricity, E85, hydrogen, natural gas, and propane, as well as the fueling infrastructure needed to support them.

Transit/Bus Stop Facilities Funding

- The Transit Enhancement Activity fund can be used by regional transportation planning agencies. State and local agencies may apply and must provide a 5% match.
- The Federal Highway Administration (FHA) provides funding for pedestrian projects that increase access to public transportation and also includes bus shelters, benches and bus pads.

CASE STUDIES – ONGOING PROGRAMMING AND MANAGEMENT

Main Street Square | Rapid City South Dakota

[Contact: Liz Smith – events director 605-716-7979]

Main Street Square is an outdoor landscaped festival area approximately 1 acre in size. The stage and lawn encompass about 20,000 sq. ft. Main Street Square is also the name of the nonprofit organization that runs the square and adjacent pedestrian alley. Both spaces are leased from the City. The space is highly programmed throughout the year with over 200 events that include arts and culture, live concerts, seasonal ice skating and interactive fountains. Main Street Square operates on a $1.2 million budget raised through donations, sponsorships and event revenue. Additionally, Main Street Square currently receives $120,000 from the local Downtown Business Improvement District tax assessment and in return, manages the Downtown BID funds and spearheads downtown improvement projects under the direction of the Downtown BID Board. The Destination Rapid City and Main Street Square office in the Main Street Square Shops building also serves as a Visitor Information Center.

Public restrooms are available year-round in the adjacent parking structure. Parking is metered on the first level of the structure Monday through Friday, 9 a.m. to 4 p.m. Parking is free after 4pm Monday through Friday, weekends, and holidays.

PRIVATE EVENTS

Many events at the Square are privately funded but open to the public, such as Walk for Wishes. About 26 of the 200 annual events are fully private, where the square is fenced off with dedicated entry gates and guest lists. The event rental fee for the entire square is $480 for the first two hours and $280 for each additional hour. Additionally, the renter must hire 2 security guards contracted by Main Street Square for $54 per hour. If the event entails private vendors with tents/booths, then for each one-third of the square the fee is $430 for the first 2 hours and $180 for each additional hour. Main Street Square solicits private sponsorships for events it manages, with a variety of pricing options. The most expensive sponsorships provide the sponsor with print, radio, and television advertising, booth space, tables and chairs.

LESSONS LEARNED

The biggest challenge of the space is that it that it is open to general public. Main Street Square has a great relationship with the Rapid City police department with open lines of communication. The police regularly patrol the space and they are in constant communication about what types of events are being held, particularly those that allow alcohol and those that attract many young children. Also, many people assume that the space is a public park and funded by tax dollars which sets their expectations for continual access. Educating the community that the space is not run by the City was critical to gain community support, especially in the first couple years of operation.

Main Street Square, Rapid City, SD

PRECEDENT IMAGES FOR COMMUNITY BENEFIT ELEMENTS

Denver Botanical Gardens, CO |Partial underground parking

Denver Botanical Gardens, CO |Children's playground on the roof

Santa Monica, CA Bicycle hub in parking structure

Lowenstein, Denver, CO | Rooftop utilized in off-peak hours for concerts

Multi-tenant non-profit arts & cultural organizations

Programming that enhances Wailuku Town Center's arts and cultural identity was considered for inclusion in the Parking and Events Facility. While there is no one champion for this type of effort, there are multiple organizations that support the arts in Wailuku and offer creative and exploratory programs for children. To inform a concept that could include multiple non-profit tenants, precedents were researched.

KEY FINDINGS

- A valuable resource organization exists which specializes in supporting those that seek to develop a multi-tenant nonprofit center.
- Most centers break-even and nearly a quarter are profitable. Less than a quarter run a deficit.
- Larger size than has yet been considered in the Wailuku PEF project (>50,000 s. f.) appears better for long term financial sustainability.
- Management needs are very significant and do not appear to be a realistic "side effort" of MRA in the near or long term.

USE & AMENITY EVALUATION

Many different uses and amenities could be included in the Wailuku Parking and Events Facility. P.U.M.A. evaluated which uses and amenities hold the greatest potential by measuring them against a set of criteria. Additional considerations explored in this section include the extent to which these new uses or amenities generate additional parking demand and the extent to which they have revenue generating potential.

Use & Amenities Rankings

The rankings table below evaluates uses and amenities based on: market demand; compelling community benefit; economic development impact; ease of management and maintenance; the ability to share the parking during off-hours (versus drive additional demand in peak times); and the existence of champions (such as funders, officials, tenants or other legitimate stakeholder groups) that demonstrate the capacity to advocate for and manage a community use. Factors are ranked negative 2 (-2) through positive 2 (+2) as a relative, order-of-magnitude measure. Rankings are color-coded from highest to lowest.

USE RANKINGS TABLE						
Use	Market Demand	Community Benefit	Economic Impact	Management	Champions	Share Parking
County meeting, hearing & training room	+ 1	+1	0	+1	+2	+1
Plaza, park or green space	+1	+2	+1	-2	+1	0
Food trucks or outdoor market area	+2	+1	+2	-1	+1	+1
Children's museum/discovery center	+2	+2	+2	-2	+1	-1
Outdoor performance/rehearsal venue	+2	+2	+1	-2	+1	+2
Reception space & catering kitchen	+2	+2	+2	-2	+1	+2
Onsite management (MRA) offices	0	+2	+1	+2	+2	+1
Educational Activities/Classes	+2	+1	+1	-1	0	+1
Bike parking and repair	0	+1	+1	0	0	+2
Meeting room for businesses	0	+1	+1	-1	0	-1
Housing	+2	+1	+1	-2	+1	+1
Indoor performance/rehearsal venue	-2	+1	-1	-2	-1	+2
Restaurant or cafe	+2	+1	0	-2	-1	0
Grocery	+2	+1	+2	-2	-1	-1
Office space	+2	-1	-1	-1	-1	-2
Commissary kitchen	+ 1	+ 1	+1	-2	0	-1
Emergency command center	+1	-1	-2	+1	+1	0

The table summarizes amenities or detail elements that could be incorporated within the major use concepts identified in the Use Rankings Table above. Most of these have limited space requirements and could be incorporated within the design. These amenities will impact the feasibility, utilization and, in some instances, revenue potential.

TABLE OF AMENITIES				
Amenities	**Size**	**Users**	**Location**	**Why?**
Secure maintenance, storage & staging area	1,000 to 3,000 sq. ft.	MRA; event, programming & performance providers	Accessible from exterior after hours.	Staging for programming to activate park/plaza and Kipuka square.
Food service tenant area	2,000 to 4,000 sq. ft.	Food service concession	Vineyard St. frontage; 1st floor facing plaza/park	Plaza activation, food use, & visitor attraction.
Shaded, dedicated Police Parking	1 parking stall	Police Officers	Parking garage overlooking plaza/park	Security.
Covered secure bike parking	200 to 500 sq. ft.	Employees and visitors	Within parking garage	Support alternative & healthy transportation use; visitor attraction; ties into blue zone.
Circulator shuttle bus waiting area	200 sq. ft.	Employees and visitors	Vineyard or Church frontage	Support a “park once” mentality within Wailuku.
Walking track/ markings	unknown	Community	Around parking structure	Create a shaded, lighted area for exercise; pedestrian safety; partner with Blue Zone and health funders.
Farmer’s/Art Market area	n/a; ceiling height	Community	1st level parking deck	Allow for weekend utilization and shaded event area.
Free Wi-fi access zone	n/a	Community	On plaza	Encourage lingering at park/plaza.
Food Truck parking & utility hook-ups	5 to 10 spaces	Food Trucks	Adjoining plaza/park	Activation & event support.
Enhanced business access; i.e., loading or drive-through	unknown	All visitor, employees, etc.	Access aisles to parking structure	Improve access and visibility to parking and to businesses; reduce traffic impediments.
Vineyard infrastructure upgrades	Within ROW	Community	Vineyard ROW	Improve pedestrian safety and drainage.
Street Festival Treatment	Within ROW	Community	TBD – Pili, Vineyard or Market	Allow for expanded gatherings, connect programming on site to Market St. & ‘Iao Square.

Parking Generation

One of the considerations when determining what level of parking to provide at the Parking and Events Facility project site is how much additional demand will be generated by the new uses proposed for the project outside of the parking structure. To help answer this question, P.U.M.A. referred to the Wailuku Redevelopment Area Zoning and Development Code parking requirements for uses that might be considered for the project; reviewed the 2011 Wailuku Town Parking Study, and gathered parking estimates for existing facilities with uses that might be similar to what is included in the PEF. A parking study for the project is currently underway with Dixon Resources Unlimited, which will include strategies for managing and operating the parking structure.

PARKING REQUIRMENTS

The table below references parking requirements, from the Wailuku Redevelopment Area Zoning and Development Code, for uses considered for the PEF project. While this is a helpful guide, actual demand generation may vary from code requirements.

USE	MINIMUM PARKING RATIO
Auditorium, theater, stadium, bleachers, place of assembly	1 parking space for every 6 seats. (In assembly areas in which patrons or spectators occupy benches, pews, or other similar seating facilities, each 24 inches of width shall be counted as a seat for the purpose of determining requirements for off-street parking).
Church	1 parking space for every 100-sq. ft. of floor area, where the church is within 500 feet of a public parking lot with more than 150 stalls the MRA may grant the church a waiver of up to 75% of the required stalls provided that service times are limited to weekends and after 6:00 p.m. on weekdays.
Day Care Facility	1 space per 10 care recipients, plus 4 pick-up/drop-off spaces for facilities with more than 25 care recipients.
Eating establishment	1 parking space for every 100-sq. ft. of serving and dining areas; including areas used for outdoor dining, provided, that there shall be a minimum of 3 parking spaces for patrons and a minimum of 3 additional spaces for employee parking for each such establishment.
Education, specialized	1 space per each 10 students of design capacity, plus 1 space per 400 square feet of office floor space.
Food/beverage/merchandise kiosk	None
Food and beverage retail	1 space per 500 square feet of floor area of building; provided that the minimum shall be three spaces.
General office	1 parking space for every 500-sq. ft. of floor area; provided, that the minimum shall be 3 parking spaces.
Library, museum, art gallery	1 parking space for every 300-sq. ft. of floor area
Outside open-air markets	None if within 400 feet of a public parking lot with more than 150 parking stalls. Otherwise, 1 space per 500 square feet of floor area; none required during County sponsored special events.

2011 WAILUKU TOWN PARKING STUDY

- Parking shortage was estimated at approximately (-200) spaces in the Central Market sub-area and (-262) spaces in the Government Center sub area.
- Parking occupancy and utilization at the 12-hour spaces in the Municipal Lot were consistently parked at 100% occupancy on weekdays from 7:30am to 3:30pm, effectively taking 140 off-street parking spaces out of public inventory.
- The most common utilization for the 2-hr parking spots was between 11:00am and 2:30pm with peaks around 12:30pm. Fridays tend to be less busy than other days of the week.

PARKING AT EXISTING FACILITIES

- Existing community and meeting spaces range from an estimated 200 parking spaces at the Wailuku Community Center to approximately 300 spaces at the Cameron Center.
- Smaller cultural venues, such as museums, and art/play studios, range from about 15 to 35 parking spaces. While peak times vary, weather is a consistent determinant. Rainy days tend to generate higher visitation and therefore parking demand.
- Parking requirements for comparable discovery centers range from 3 to 5 parking spaces for 1,000 sq. ft.

Parking at the Wailuku Community Center

Revenue Generation

Another factor used to evaluate uses, was their cost recovery potential. The table on the following page, identifies earned income opportunities from each type of use considered. An estimated annual earning and an explanation of assumptions used to generate the annual earning amount are included.

EARNED INCOME SUMMARY TABLE			
Type of Space	**Earned Income Opportunities**	**Est. Annual Earning**	**Assumptions**
Landscaped Plaza/Festival Area (smaller scale)	User fees for private or community events	$7,200 - $14,400	$500/day entire plaza x 1-2/mo. + $100 reception patio x1-2/mo.
Community Programming Classrooms	Net revenue from Program Providers	$9,600 - $20,000	4 rooms x 15-25 hrs./week x$4/hr. x 40-50 wks./yr.
Community Reception Space & Catering Kitchen	Rental Fees - peer mainland facilities cover operational costs with weekend rentals only	$18,750 - $31,250	$250/half day x 75-125 events/yr.; (more if stand-alone)
Arts and Cultural/Children's Discovery Center Space	Tenant leasing, but subsidized to support non-profit/civic use	$12,000 -$20,000	12-20,000 sq. ft. at $1/sq. ft./mo. (50% off market rate)
Wailuku Visitors Center	Potential for Wailuku product sales	$3,000 - $6,000	500 sq. ft. at $0.50-$1/sq. ft. mo.
Concession	Tenant leasing	$3,000 - $6,000	500 sq. ft. at $0.50-$1/sq. ft./mo.
Specialty Food or Grocery	Tenant leasing	$60,000 - $180,000	10,000 sq. ft. @ $0.50 - $1.50/sq. ft./mo.
Real Property Tax offices & County One Stop Bill Pay Counter	Rent recovery	$240,000 - $360,000	10,000 sq. ft. @$2-$3/sq. ft./mo. (Wailuku - Maui Mall rates)
County Hearing/Training/ Meeting Room - 150 capacity	After-hours meeting room rental fees	$2,100 - $4,200	$35/hour x 30-60, 2-hr rentals/yr.
County MRA Management Offices	Rent recovery	$16,000- $2,4000	1,000 sq. ft. at $1.50- $2/sq. ft./mo.
County High Tech Conference Room	Night and weekend rental fees	$2,600 - $5,600	$50 an hour to $20 for the day about once a week annually
Food Trucks/Outdoor Market	Permits for food Trucks	$1,200 -$9,600	$20 x 5-20 stalls x12-24 events
Outdoor Stage	User fees – est. based on Parks fees	$4,000 - $8,000	$200/event x 2-4 events/mo.
Programming Storage Area	Recoup cost of equipment purchase through rentals	N/A	Pricing similar to Parks to cover costs; not a profit center
Covered Bike Parking	Parking demand reduction	N/A	Equivalent to 1-4 stalls over 10 years

THREE INITIAL PROGRAM SCENARIOS

After consideration of many factors, a range of viable program options were identified. In order to present a range of choices for advisors and decision makers to consider, the uses were packaged into three programming options, of low, medium and high intensity. The components of each option, including the pros and the cons, are described in this section.

Standard Components

While each scenario is different, all scenarios assume inclusion of the following:

- A parking structure with a minimum capacity of 300 stalls
- Community reception space and catering kitchen
- Real Property Tax offices, including a Maui County one-stop bill pay counter
- A landscaped plaza/festival area with an outdoor stage
- Food trucks/outdoor market with 5 to 10 parking stalls

At the time these scenarios were generated, it was believed that the County would likely own and control the whole project, and wanted to limit its role in hosting private, for-profit tenants. Therefore, although market studies revealed various demand-based tenant opportunities, few were included in the scenarios.

PROGRAMMING OPTION 1: LOW INTENSITY

Credit: Ferraro Choi

Standard Components

- Parking structure; 4-levels of above grade parking with approximately 361 stalls.
- Community reception space and catering kitchen.
- Landscaped plaza/festival area with an outdoor stage.
- Real Property Tax offices, including a Maui County one-stop bill pay counter.
- Food trucks/outdoor market with 5 to 10 stalls.
- Bioswale

Programming Option 1: Low Intensity	
Pros	*Cons*
• Lowest cost and management demand. • Plaza would create an iconic landmark. • Creates indoor venue option for local caterers. • Break-even municipal event pavilion precedents exist. • Negligible increase in peak parking demand if rented nights and weekends; can likely cover operations (not facility) cost. • Smaller total area utilization, remaining area available for additional parking.	• Plaza has lowest activation and economic development potential of the three options because event attendees not likely to patronize other restaurants or retailers. • May not maximize site potential, plaza likely to be underutilized on weekdays & weeknights. • If space is rented/used during weekdays, this would increase peak parking demand by 1 car for every 2 attendees or up to 150 spaces.

PROGRAMMING OPTION 2: MEDIUM INTENSITY

Credit: Ferraro Choi

Standard Components

- Parking structure; 3-levels of above grade parking and 1-level below grade with approximately 367 stalls.
- Community reception space and catering kitchen.
- Landscaped plaza/festival area with an outdoor stage.
- Real Property Tax offices, including a Maui County one-stop bill pay counter.
- Food trucks/outdoor market with 5 to 10 stalls.
- Bioswale

Additional Components

- Community programming classrooms
- County hearing, training and meeting room facility
- County MRA offices
- Programming storage area
- Covered bike parking

Programming Option 2: Medium Intensity	
Pros	*Cons*
• Excellent afternoon/evening/weekend activation and vitality. • Economic development potential from families before/during/after classes. • Supports program providers who struggle to find affordable space. • Advances Wailuku Town Center arts & cultural brand identity and offerings. • Convenience for families with children in more than one program. • Adds a common municipal function that is lacking in Central Maui.	• Weekend demand for training room appears low, possibly redundant to Cameron Center. • Classroom revenue potential would be very modest. • Peak parking demand increase is negligible for afterschool/weekend. It increases by 12-to-30 spaces during the day in summer months *(based on County parking standard for Special Educational use of 1 space for every 10 students).* • Need faster/easier user permitting system to be successful. • Need to ensure the security of the dais and AV equipment. • Structure likely not as iconic a landmark as a pavilion.

PROGRAMMING OPTION 3: HIGH INTENSITY

Credit: Ferraro Choi

Standard Components

- Parking structure; 2-levels of above grade parking and 1-level below grade with approximately 311 stalls.
- Community reception space and catering kitchen.
- Landscaped plaza/festival area with an outdoor stage.
- Real Property Tax offices, including a Maui County one-stop bill pay counter.
- Food trucks/outdoor market with 5 to 10 stalls.
- Bioswale

Additional Components

- Community programming classrooms
- County hearing, training and meeting room facility
- County MRA offices
- Programming storage area
- Covered bike parking
- Arts and cultural/children's discovery center
- Iao visitor center
- Concession
- County high tech conference room
- Interactive water feature

<table>
<tr><th colspan="2">Programming Option 3: High Intensity</th></tr>
<tr><th>Pros</th><th>Cons</th></tr>
<tr><td>
• Small discovery centers are doing well nationally.
• Excellent activation and vitality.
• Economic development potential from attendees before/during/after use of the facility.
• Advances Wailuku Town Center arts & cultural brand identity and offerings.
• Supports program providers.
• Reception function makes use of otherwise underutilized hearing room hours.
• Creates indoor venue option for local caterers.
• Center management could manage plaza maintenance & perhaps programming.
• Maximum project impact and development intensity.
</td><td>
• Discovery Center needs a champion/organization.
• Significant increase in peak parking demand especially when rainy.
• Uncertainty in space needs and parking demand, tenant mix, attendees.
• Plaza programming/activation may be prioritized better if done by MRA.
• Multi-function reception room likely less distinctive/desirable than pavilion.
• Structure likely not as iconic a landmark as pavilion.
• Potential tenants may serve visitors as much or more than locals.
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The table below shows programming options, including an estimated square footage, for all three scenarios arranged by Community, County and Amenity.

	Type of Space	Target Square Footage	Low Intensity	Medium Intensity	High Intensity
COMMUNITY	**Landscaped Plaza/Festival Area (smaller scale)**	15,000 - 25,000 sq. ft. including adjoining Vineyard St. festival area	☺	☺	☺
COMMUNITY	**Community Programming Classrooms**	7,000 - 12,000 sq. ft.		☺	
COMMUNITY	**Community Reception Space & Catering Kitchen**	5,000 sq. ft.	☺ Stand-alone structure	☺ Stand-alone structure	☺ Multi-functional
COMMUNITY	**Arts and Cultural/Children's Discovery Center Tenant Space**	12,000 - 20,000 sq. ft.			☺
COMMUNITY	**Wailuku Visitors Center**	500 sq. ft.			☺
COMMUNITY	**Concession**	500 sq. ft.			☺
COUNTY	**Real Property Tax and County One Stop bill pay counter**	10,000 sq. ft.	☺	☺	☺
COUNTY	**County Hearing/Training/Meeting Room Facility - 150-person capacity**	4,000 - 6,000 sq. ft.		☺	☺
COUNTY	**County MRA Management offices**	1,000 sq. ft.		☺	☺
COUNTY	**County High Tech Conference Room**	1,500 sq. ft.			☺
AMENITY	**Food Trucks/Outdoor Market Area**	5 -10 spaces	☺	☺	☺
AMENITY	**Outdoor Stage**	Varies	☺	☺	☺
AMENITY	**Programming Storage Area**	1,000 sq. ft.		☺	☺
AMENITY	**Covered Bike Parking**	200 – 500 sq. ft.		☺	☺
AMENITY	**Interactive Play Feature**	N/A			☺
AMENITY	**Bioswale**	N/A			☺

CONCLUSION

The Programming Feasibility Assessment identifies and provides rationale for a range of viable program elements. This information was used to inform the three initial program scenarios for the Wailuku Parking and Events Facility, provided in this report, and will continue be informative as a preferred scenario is solidified. It should be noted that the program elements identified in this Feasibility Assessment are based on available information at this point in time. New opportunities and conditions may arise during the course of the PEF project design and construction. Designing the buildings and spaces of the project for adaptability will allow the project to be nimble and accommodate changes in conditions, should the need arise in the near term, as well as provide longevity over the long term.

Market Street, Wailuku Town Center

Wailuku First Friday

APPENDIX

2017 WAILUKU TOWN REDEVELOPMENT AREA MARKET PROFILE

SPRING 2017 WAILUKU COMMUNITY SURVEY SUMMARY

WAILUKU TOWN REDEVELOPMENT AREA

2017 MARKET PROFILE

FINAL DRAFT

Prepared By:

PROGRESSIVE URBAN MANAGEMENT ASSOCIATES

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JULY 2017 – FINAL DRAFT

CONTENTS

INTRODUCTION

P.U.M.A. initially developed a Market Profile for the Wailuku Town Redevelopment Area as part of the 2010 Wailuku Redevelopment Area Market-Based Plan. This 2017 Market Profile is an update to the 2010 original. It has been prepared as part of the Wailuku Parking & Events Facility planning and design effort, to help identify implications for the site planning, programming, and development; but is designed to also serve as a stand-alone document.

Data in this Market Profile was compiled using primary and secondary sources, including State and County reports and studies, Esri's Business Analyst, the U.S. Census Bureau, real estate industry reports, and other available sources.

BACKGROUND

Wailuku is located directly to the east of the West Maui Mountains, which provide the town with a spectacular, scenic backdrop. It is referred to as the gateway to the 'Iao Valley, one of Maui's most important historic sites and visitor attractions. Immediately adjacent to Wailuku on the east is the harbor town of Kahului, Maui's commercial and industrial center and home to Maui's air and ocean transportation facilities.

The Wailuku area was a center of power and population in pre-contact Hawaii. In the mid-1800s it was forever changed when New England missionaries brought their religious beliefs, Western skills and implements, and new agricultural methods. Within fifteen years, the Wailuku Sugar Company and other plantations were busy growing and milling sugarcane. Miles of ditches were dug, bringing irrigation water from deep in the mountains to the fields of Central Maui, where the sugar industry flourished. Thousands of skilled and unskilled workers immigrated to Maui from Asia, Europe and America to work in the fields and factories, bringing ethnic, cultural and religious diversity to the island.

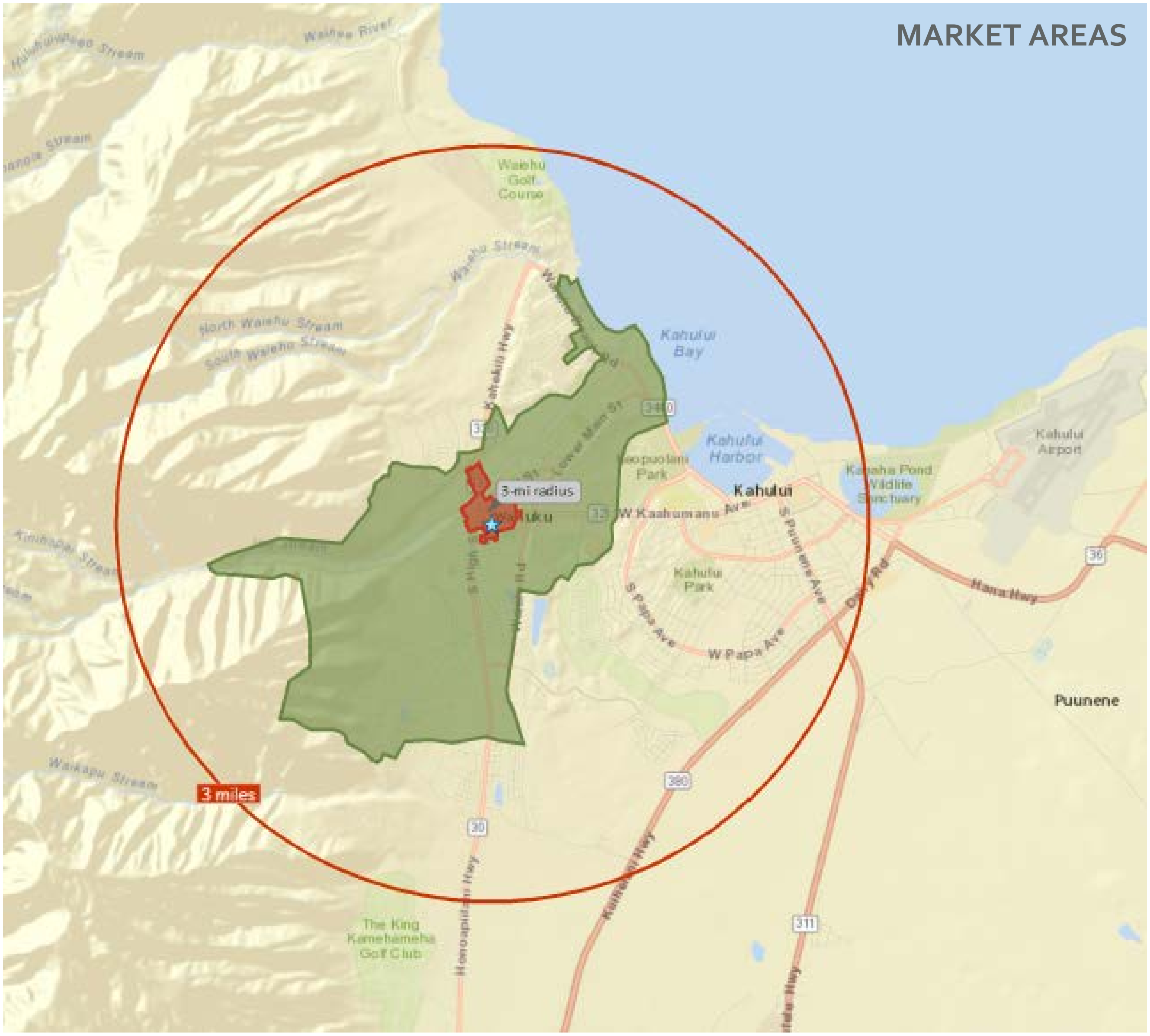
Maui County includes the islands of Maui, Molokai, Lana'i, and the uninhabited Kaho'olawe. Wailuku was declared County Seat in 1905, and it soon grew to become a hub of government, business, hospitality and entertainment. The sugar industry's decline in the 1960s along with the development of tourism and other commercial centers in other areas of the island drew many of the visitor-focused businesses away from Wailuku. Today, the Wailuku-Kahului area remains the economic and population center of the island.[1] The core area of Wailuku, referred to as the Wailuku Town Redevelopment Area, continues to be the hub of both government and of professional businesses on Maui. The Wailuku Town Redevelopment Area also hosts a collection of restaurants and retail, and two of the most prominent performing arts organizations on Maui.

MARKET AREAS

Where available, data was collected for three area geographies (from smallest to largest): the Wailuku Town Redevelopment Area (also referred to as simply the "Redevelopment Area" or WRA in this report), the Wailuku CDP (Census Designated Place), and a 3-mile radius from the Parking & Events Facility site. The map on the following page shows these three market areas (the Wailuku Town Redevelopment Area filled in red, Wailuku CDP filled in green, and the 3-mile radius illustrated as a red circle). The approximately 68-acre Wailuku Town Redevelopment Area, is centrally located within the Wailuku CDP. The Redevelopment Area includes the business blocks surrounding the Market-Vineyard intersection (Old Wailuku Town) and adjacent residential

[1] Alternative-hawai'i.com; via the 2010 Market Profile

areas including Happy Valley. The 3-mile radius includes all of the Wailuku CDP, much of the Kahului CDP, and stretches north to Waihe'e-Waiehu and south to Waikapu.



EXECUTIVE SUMMARY

The 2017 Market Profile evaluated each market sector in the Wailuku Town Redevelopment Area and how market conditions and demographics have changed since 2010. The following executive summary highlights the six major findings that were identified during this process.

1. ***Wailuku Town Redevelopment Area market fundamentals have seen little change since 2010***

   While Maui as a whole has experienced steady population growth, booming tourism, and rapidly rising cost of living, market conditions in the Redevelopment Area have remained largely unchanged over the last seven years. Simply, the rising tide on Maui is not lifting all boats. In the Redevelopment Area, there has been no population growth, as households have been getting older and smaller. Income has been stagnant and unemployment has been rising. There has been no significant new housing development and the existing building stock is aging and largely unimproved.

   Existing retail on Market Street

   Therefore, in-place residents are creating little market demand, and to fully realize market potential, the Redevelopment Area needs to capture energy from others beyond the local residential population. The Redevelopment Area remains an employment hub for the region, with a daytime population that is 400% larger than its residential population thanks to an influx of nearly 2,000 workers. This large daytime population is a major driver of market demand and remains a strength for the Redevelopment Area.

2. ***Demand for construction of new housing at affordable price points***

   Maui County is in the midst of a housing affordability crisis. It is one of the ten least affordable counties in the nation, with median single-family home prices pushing toward $800,000. Housing continues to be built across the island in an effort to keep up with demand – a projected 14,000 new units will be needed by 2025 – but the lack of inventory remains a cause of skyrocketing costs. Furthermore, this new housing is not being built in the Redevelopment Area, which has only seen 4% growth to its housing stock since 2010. As the county continues to get more expensive, there will be demand for housing (particularly at affordable price points) in the Redevelopment Area, given its relative affordability, central location, and proximity to jobs.

3. ***Demand for construction of new niche lodging***

   Tourism is Maui's leading economic sector and is currently at record levels of arrivals and visitor spending. While much of the lodging is clustered in resort areas, the new Courtyard by Marriott in Kahului proves support for additional lodging in central Maui. The Courtyard has daily rates in the $200s along with healthy occupancy. Other than its convenient location near the airport, the Wailuku Town Redevelopment Area is a more appealing environment for visitors, given its historic character, walkability, and local ambiance. However, the Redevelopment Area's existing lodging options are limited to only a few budget hostels and bed & breakfast inns. Given that a majority of new lodging in Maui has been resort-based, the

Redevelopment Area has the ability to fill a lodging niche that is currently underserved on the island. There are limited options for business travelers, non-families (i.e., millennials or baby boomers), and extended stay visitors. The Wailuku Town Redevelopment Area is a strong location for a small, boutique hotel (with fewer than 100 rooms) catering to these users. Current obstacles to building new lodging are inadequate infrastructure, a lack of parking, and small parcel sizes.

4. ***Retail demand to fill, if certain barriers are removed***
Central Maui currently has a soft retail market. However, this has largely been driven by a number of big box vacancies and relocations. The Redevelopment Area's retail conditions have slightly improved since 2010. There has been modest growth in the number of spas and salons, restaurants, specialty boutiques, and art galleries; however, the number of vacant units has remained the same. The vacancy rate currently sits at 14%. There are several code and compliance barriers, as well as a building stock in need of general improvements, that prevent new retail (in particular restaurants and bars) from locating in the Redevelopment Area. If these can be resolved, the Area has the ability to serve a variety of users: the daytime population, visitors, cultural event attendees, and local residents. The Wailuku Town Redevelopment Area is authentic and not manicured, and new retail needs to be a reflection of this. Given the factors listed above, the majority of demand is for new local and independent restaurants, especially more casual dining which can serve daytime, residential, and visitor populations, at all income levels. Secondarily, there is also modest potential for leisure shopping and a specialty food store.

Office/retail space for rent on Market Street

5. ***Office demand to fill, if certain barriers are removed***
Maui has been experiencing a soft office market over the past several years. The Wailuku CDP's office vacancy was 16% in 2016. However, the Wailuku Town Redevelopment Area is in a better position since it is an employment hub for the region, with strong anchor sectors in public administration and health care. Illustrating this, while the Redevelopment Area only makes up 2% of the Wailuku CDP's land mass (Census Designated Place, in green on map), it accounts for 15% of its jobs and 18% of its businesses. The lack of available parking for businesses is the primary barrier preventing it from fully realizing demand. If this barrier is addressed, the Redevelopment Area can fill in existing office space with small businesses that are complimentary to the public sector, as well as small entrepreneurial and innovative businesses that are attracted to authentic and local environments with affordable lease rates.

6. ***Demand to expand art & cultural offerings***
Arguably the most pronounced change in the Wailuku Town Redevelopment Area since 2010 has been the growing arts and cultural cluster: the ʻIao Theater's attendance has risen significantly over the past decade; the monthly First Friday event on Market Street has been established and continues to grow; Maui Academy of Performing Arts (MAPA) has plans to build a new black box theater; and the number of art galleries has tripled. There is demand for additional offerings to continue to grow this niche – particularly in theater and music. These would serve both locals and visitors, and would help further develop a brand for the Wailuku CDP as a whole.

POPULATION AND HOUSEHOLDS

This section examines demographics within the three market geographies by providing information on population age, race and ethnicity, and income, as well as how it differs amongst the various market areas. On average, the population of the Redevelopment Area can be characterized as older, ethnically diverse, and with very modest incomes.

POPULATION CHARACTERISTICS

The population in the Redevelopment Area was estimated to be 451 in 2016, a 2.7% increase since 2010. The Redevelopment Area experienced less population growth than the Wailuku CDP and the 3-mile radius, where the population increased by 7% between 2010 and 2016. According to Esri estimates, this slower growth rate is projected to continue over the next five years.

Households in the Redevelopment Area are relatively small, with an average household size of 1.85. This is considerably smaller than averages in both Wailuku CDP (2.7) and the 3-mile radius (3.25), and indicates a larger proportion of single-member households.

The Redevelopment Area is an employment hub for the region, as illustrated by its daytime population. During the workday, its population balloons to over 2,200 with the influx of nearly 2,000 workers. This daytime population is 398% larger than the residential population. The two larger market areas also have larger daytime populations as well, albeit much more balanced between residents and workers. In the Redevelopment Area, only 11% of the daytime population is residents, compared to 40% in the CDP and 50% in the 3-mile radius.

POPULATION & HOUSEHOLDS (2016)

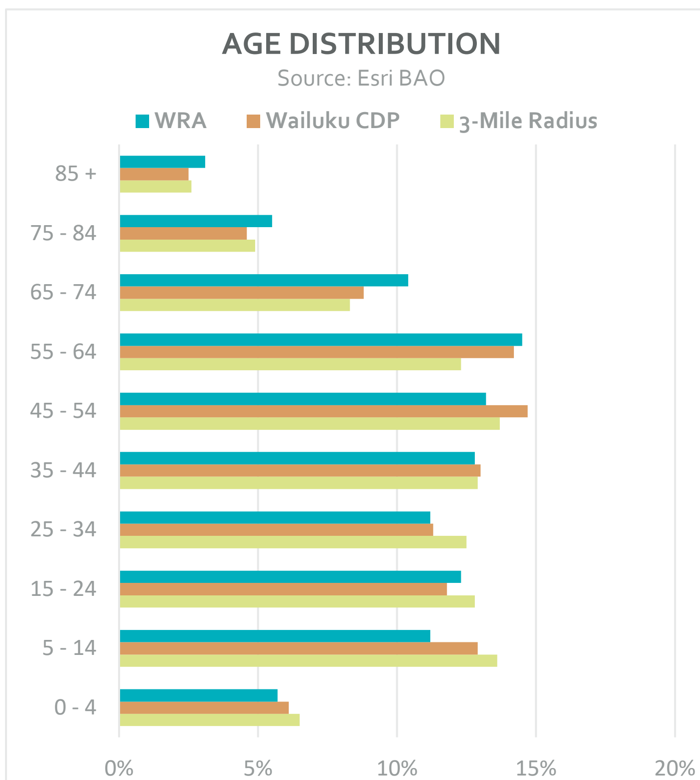
	WRA	Wailuku CDP	3-Mile Radius
Population	451	16,484	56,637
Population Growth (2010-2016)	2.7%	7.6%	7.0%
Households	240	6,027	16,840
Average Household Size	1.85	2.70	3.25
Median Household Income	$46,512	$65,220	$69,991
Daytime Population	2,246	21,033	57,060
Residents	261	8,316	28,570
Workers	1,985	12,717	28,490
Male	225	8,040	27,922
Female	226	8,446	28,715

Source: Esri Community Profile

AGE

Compared to the other two market areas, the Redevelopment Area has a larger proportion of older adults (55+) and fewer children.

The median age of 42.3 in the Redevelopment Area is slightly older, compared to 41.1 in the CDP, and 38.6 in the 3-mile radius.



In the Redevelopment Area, 17% of the population is 14 and under, which is similar but slightly less than the Countywide percentage (18.5%) in this age bracket. There are more families with children living in the 3-mile area, illustrated by the higher percentage of the population 14 and under (>20%) and average household size of 3.25.

CULTURAL HISTORY AND IMMIGRATION

Maui is a multi-cultural society, reflecting major immigration patterns throughout its history. During the 1800s, American businessmen arrived to invest in pineapple and sugar plantations. After a smallpox epidemic killed many native Hawai'ians, immigrants from China, Japan, the Philippines, and Europe flocked to Maui to work in the sugar cane fields. The table (top right) is a timeline of major immigration to Maui from overseas.

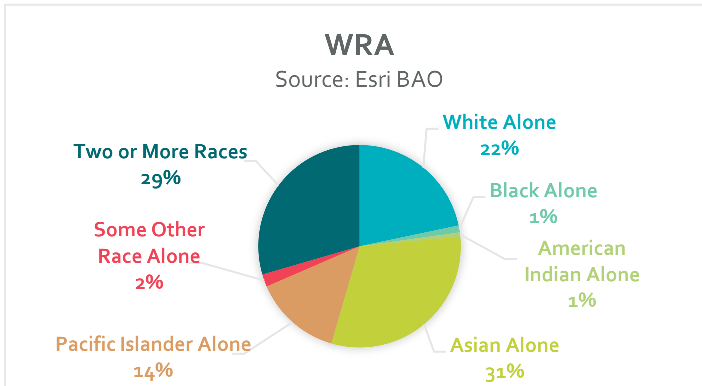
As the center of commerce and government, the Wailuku CDP's local history in the last century very much reflects the full range of Maui's multicultural influences. Interviews with locals note the continuing importance of the Wailuku CDP as a governmental center, economic center, and a meeting ground for all cultural traditions on the island.

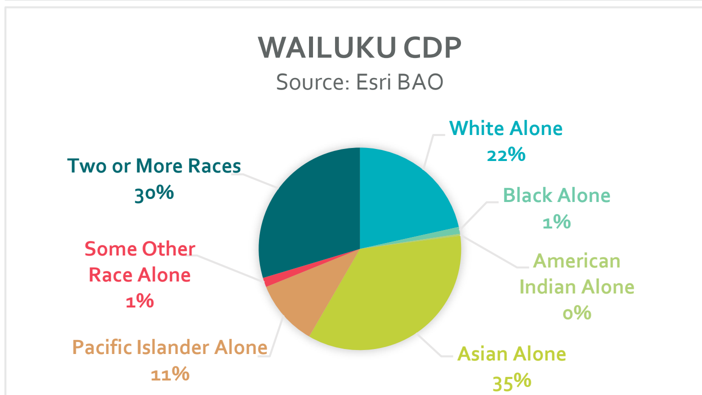
RACE AND ETHNICITY

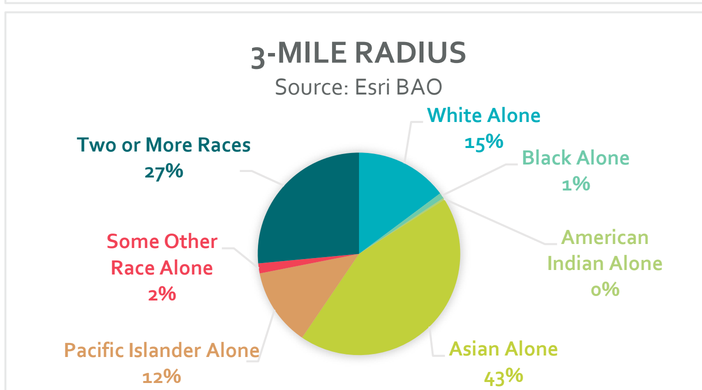
The three figures to the right illustrate the estimated racial distribution in the Wailuku Town Redevelopment Area, Wailuku CDP and the 3-mile radius in 2016. As in Maui County as a whole, there is no single majority race or ethnicity in any of the three market areas. The largest groups in the Redevelopment Area are Asian Alone at 31%, Two or More Races at 29% and White Alone at 22%. The Wailuku CDP and 3-mile radius are similar.

MAJOR IMMIGRATION TO MAUI COUNTY	
Population	**Date of Major Immigration**
Polynesia	700 A.D.
United States	1820
China	1852
Japan	1868
Portugal	1878
Puerto Rico	1900
Korea	1903
Philippines	1906

Source: alternativehawai'i.com







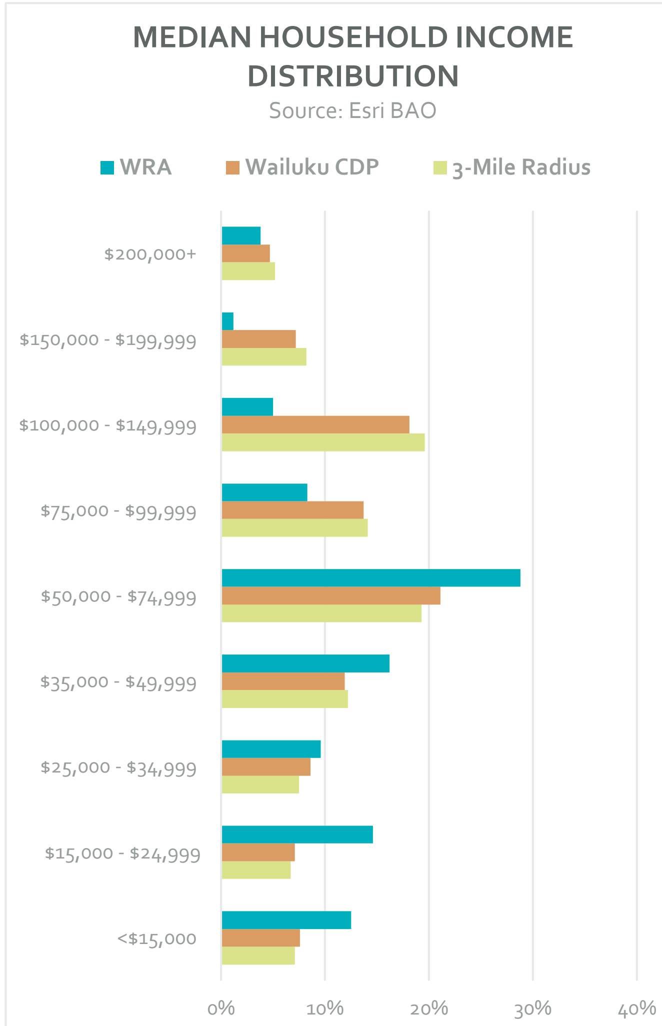
In Maui County as a whole, the largest racial groups are White Alone at 34%, Asian Alone at 28% and Two or More Races at 24%. Therefore, all three market areas have a lower proportion of White residents, and in turn a larger proportion of Asian, Pacific Islander, and Two or More Races, than the County.

INCOME CHARACTERISTICS

Overall, Redevelopment Area residents have much lower incomes, and higher unemployment and poverty rates than in the Wailuku CDP and 3-mile radius.

The Redevelopment Area has lower household incomes, in part due to higher unemployment, smaller households, and the presence of subsidized housing. Median household income in the Redevelopment Area is $46,512, compared to $65,220 in Wailuku CDP and $69,991 in the 3-mile radius. The median household income of Maui County as a whole is $68,424. Alternatively, per capita income is $24,895 in the Redevelopment Area, compared to $31,080 in the CDP and $27,413 in the 3-mile radius – still lower, but a much smaller gap than household income. The unemployment rate in the Redevelopment Area is 13.5%, which is almost double the unemployment rate in Wailuku CDP (7.1%) and the 3-mile radius (7.5%).

Few households in the Redevelopment Area have an income higher than $100,000 (10%), especially compared to the CDP (30%) and 3-mile radius (33%). On the other end of the spectrum, 27% of Redevelopment Area households have household incomes lower than $25,000, versus 15% in the CDP and 14% in the 3-mile radius. In the Redevelopment Area, the largest income cohort by far is $50,000 to $74,999, which comprises 29% of the population. The figure to the right illustrates the 2016 household income distribution for the Redevelopment Area, Wailuku CDP and the 3-mile radius.



Finally, approximately 27% of Redevelopment Area residents live under the federal poverty standard. This is a significant proportion of the population compared to Wailuku CDP at approximately 14% and the 3-mile radius at approximately 13%.[2] Of note, over 100 units of State of Hawaii subsidized housing are located in the Redevelopment Area, which has a significant impact on the above income statistics.

[2] Calculation based on the U.S. Department of Health & Human Services 2017 poverty guidelines, which states a household of four people in Hawaii should make more than $28,290 annually in order to be above the federal poverty line used to determine financial eligibility for federal programs. Source: https://aspe.hhs.gov/poverty-guidelines

HOUSING

This section profiles housing characteristics such as type, age, occupancy, and affordability for all three market areas. Maui County is one of the most expensive counties to live in throughout the country, and housing costs are the primary reason.

HOUSING CHARACTERISTICS

There are just 264 housing units in the Redevelopment Area, less than 4% of Wailuku CDP's total. The CDP has close to 7,000 units while the 3-mie radius has over 18,000. Like with population growth, new housing development has been slower in the Redevelopment Area than in the other two comparison geographies. As a result of the new 20-unit Habitat for Humanity condo project on Kahawai Street, the Redevelopment Area saw 4.3% housing growth since 2010. The CDP and 3-mile radius have expanded housing twice as fast.

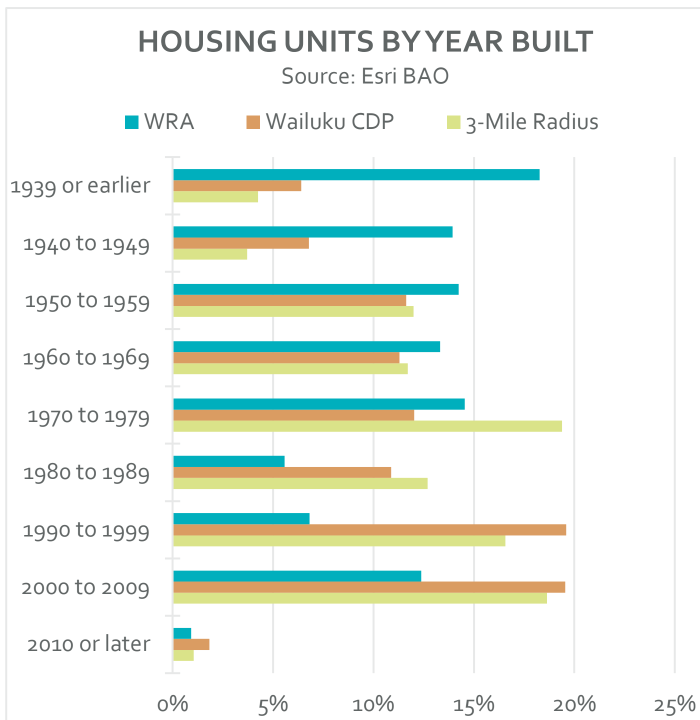
HOUSING CHARACTERISTICS (2016)

	WRA	Wailuku CDP	3-Mile Radius
Housing Units	264	6,849	18,710
% change since 2010	4.3%	9.6%	8.7%
Single-Family*	58%	64%	66%
Multi-Family*	42%	36%	34%
Owner-Occupied	35%	54%	55%
Renter-Occupied	56%	34%	35%
Vacant	9%	12%	10%
Median Home Value	$473,214	$577,748	$577,398
Median Monthly Rent*	$782	$908	$1,032

** 2014 estimates; Source: Esri BAO*

The Redevelopment Area has a greater proportion of rental units (56%) than the CDP (34%) and 3-mile radius (35%). It also has a larger proportion of multi-family housing (42%). In the 3-mile radius, two-thirds of housing units are single-family.

Estimated vacancy rates are comparable across all three areas, ranging from 9% in the Redevelopment Area to 12% in the CDP. This is strikingly high, given the high demand island-wide and relative affordability of Central Maui housing. The State attributes this high vacancy to the increasing number of seasonal and vacation units, not long-term residential vacancy.[3]



The Redevelopment Area's housing stock is considerably older than that of the other two geographies. About half of Redevelopment Area housing was built before 1960 and nearly 20% was built prior to 1940. Only 6% of the CDP housing stock and 4% of the 3-mile radius stock was built prior to 1940. The CDP and 3-mile radius both saw large quantities of housing built between 1990 and 2009.

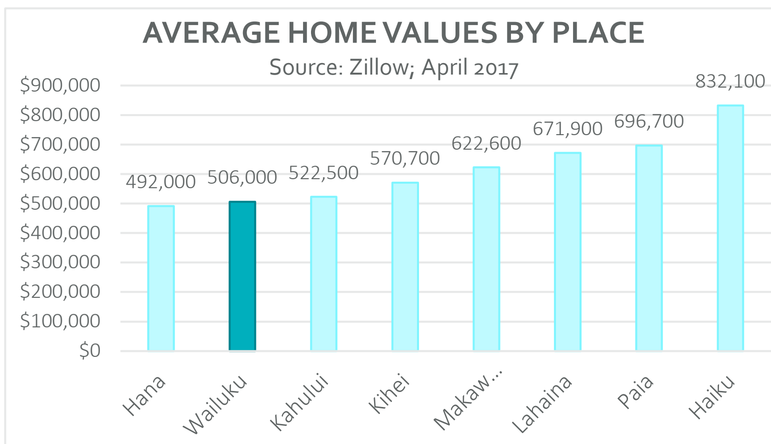
[3] http://files.hawaii.gov/dbedt/economic/reports/2015-05-housing-demand.pdf

HOUSING AFFORDABILITY

Maui County is one of the top 10 least affordable counties nationally, where average wage earners need to spend 89% of their personal income to buy a median-priced home.[4] Maui County's cost of living index is 191, meaning it costs nearly twice as much to live there compared to the U.S. on average (U.S. average is 100). The main factor for the cost of living difference is housing, which is three times higher than U.S. averages.[5] All in all, local workforce residents have been largely priced out of the market, as housing prices quickly escalate. There are two main reasons for this – out-of-state buyers purchasing investment/secondary homes are making up a majority of purchases, and lack of inventory.[6] The increase in vacation rentals (such as those listed on Airbnb and VRBO) has also had a negative impact on affordability and availability of units for local residents. Maui County is projected to have demand for at least 14,000 new housing units by 2025.[7]

The median price of a single-family home in Maui County hit $700,000 in December 2016 – the highest since 2006. Overall, 2016 prices were 10% higher than 2015. This incline is projected to continue through 2017.[8] By March of 2017, this number had already jumped to $769,000.[9]

Compared to the rest of Maui, housing costs are slightly lower in Central Maui, where outliers from luxury areas of the county do not skew the averages. In March 2017, the median price was $593,000 in Central Maui; a 13% increase from March 2016. Central Maui's median condo prices are also lower than countywide, by 27%; but have increased 30% to $345,000 during the first quarter of 2017.[10]



The chart to the right shows average home values for tracked places on Maui, according to the real estate database, Zillow. As of April 2017, the Wailuku CDP and Kahului were more affordable than any other place on the island other than Hana. However, average home values were still over $500,000 for both of these places.

Esri's estimates also depict the affordability crisis in all three market geographies. The median home value in the Redevelopment Area is $473,214, compared to $577,748 in Wailuku CDP and $577,398 in the 3-mile radius. Median rent in the Redevelopment Area is $782, lower than in the CDP ($908) and 3-mile radius ($1,032). In the CDP, nearly half of households (47%) are burdened by rent that is 30% or more of their total household income[11], a widely-accepted cutoff point when evaluating rental housing affordability. For 20% of all CDP households, more than half of their income is going towards rent alone.

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[4] http://www.bizjournals.com/pacific/news/2016/12/21/maui-and-kauai-among-least-affordable-counties-in.html
[5] http://www.bestplaces.net/cost_of_living/county/hawaii/maui
[6] http://www.mauinews.com/news/local-news/2017/01/median-price-for-a-single-family-home-hits-700000-in-december/
[7] State of Hawaii, Measuring Housing Demand in Hawaii, 2015-2025
[8] Ibid.
[9] http://www.mauinews.com/news/local-news/2017/04/median-single-family-home-price-jumps-to-769000/
[10] Ibid.
[11] Esri BAO, Population Summary

EDUCATION

This section provides details on educational attainment of adults in the three market areas and the University of Hawaii Maui College (UHMC). UHMC is a nearby asset for residents of the Redevelopment Area; however, the resident population as a whole has lower attainment levels than the CDP and 3-mile radius.

EDUCATIONAL ATTAINMENT

Although the industry profile suggests a highly educated daytime population, the residents of the Redevelopment Area have somewhat lower educational attainment overall than the CDP or 3-mile radius. In the Redevelopment Area, 21.4% of the population holds a postsecondary degree, compared to 32.4% in Wailuku CDP and 30.3% in the 3-mile radius. High school graduation rates are more similar; 34.6% of the Redevelopment Area population are graduates of high school, compared to 30.6% in Wailuku CDP and 33.5% in the 3-mile radius.

POPULATION 25+ BY EDUCATIONAL ATTAINMENT (2016)

	WRA	Wailuku CDP	3-Mile Radius
Less than 9th Grade	4.4%	3.9%	5.7%
9th - 12th Grade, No Diploma	8.5%	4.9%	5.9%
High School Graduate	34.6%	30.6%	33.5%
GED/Alternative Credential	2.8%	3.1%	3.1%
Some College, No Degree	28.3%	25.2%	21.5%
Associate Degree	6.3%	8.7%	8.9%
Bachelor's Degree	10.1%	14.9%	14.6%
Graduate/Professional Degree	5.0%	8.8%	6.8%

Source: Esri BAO

UNIVERSITY OF HAWAII MAUI COLLEGE (UHMC)

University of Hawaii Maui College is a public, commuter college located in Kahului, only 1.5 miles away from the Redevelopment Area. UHMC is the only post-secondary education institution located on Maui. It is one of ten branches of the University of Hawaii system and one of only nine institutions – public or private – offering bachelor degrees in the State. UMHC serves three islands – Maui, Lana'i and Molokai – through on-campus programs, satellite educational centers in remote areas, and distance-learning programs.

UHMC is geared to local residents that are advancing their education and careers. UHMC offers three bachelor degrees, 20 associate degrees, and 34 certificates. The three bachelor degrees offered are Applied Business & Information Technology, Engineering Technology, and Sustainable Science Management. Liberal Arts, Culinary Arts, and Nursing are three of the largest programs at the college. Of about 3,350 enrolled students, 94% are Hawaiian residents, two-thirds are enrolled part-time, and the average age is 26.

EMPLOYMENT

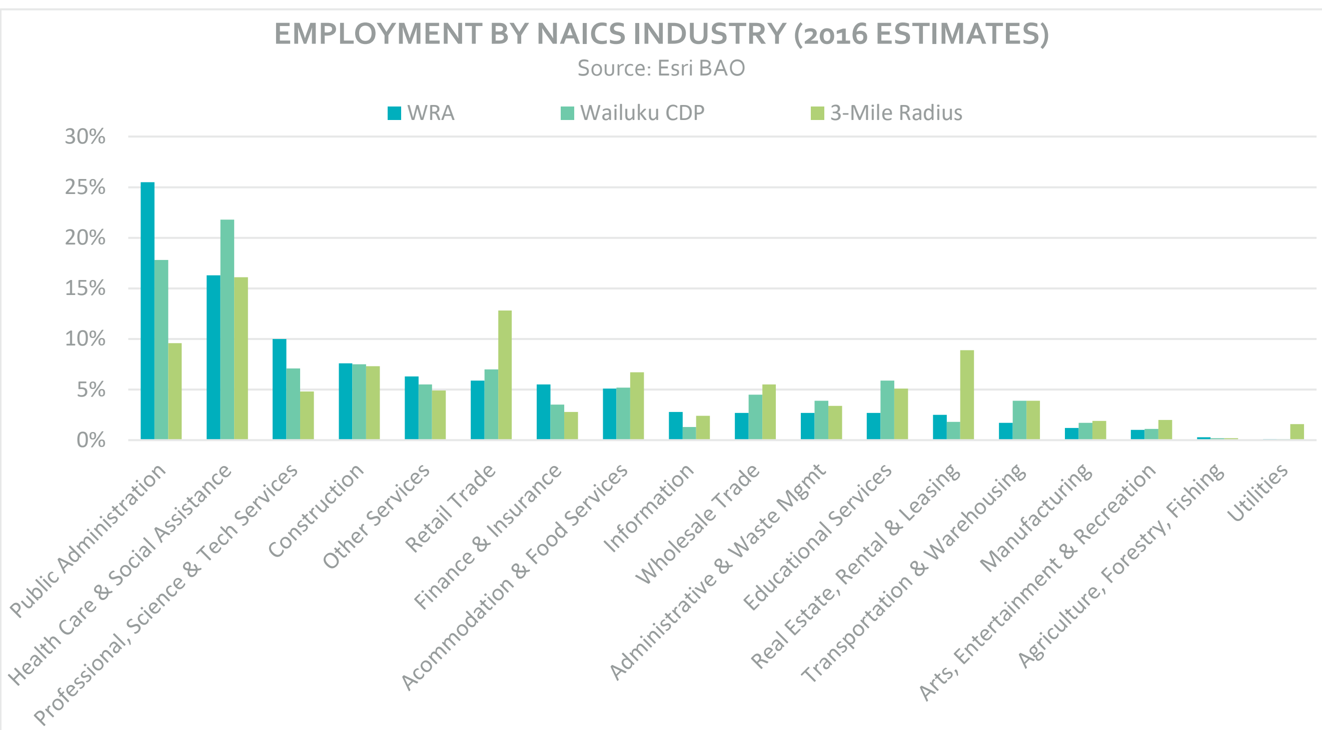
This section examines existing employment, major employers, and commercial real estate for all three geographies to better understand the economy within the Redevelopment Area and the greater Central Maui region. The Redevelopment Area is an employment hub for the region, with nearly 2,000 people working there to bolster its daytime population. This is a major driver of market demand and remains a strength for the Area.

EMPLOYMENT CHARACTERISTICS

The Redevelopment Area is an economic engine for the region. Although it only makes up 2% of Wailuku CDP's land mass, it accounts for 15% of its jobs and 18% of businesses. The table below provides a snapshot of the number of businesses and employees within all three geographies, including two measures that compare jobs and business density, which demonstrate the power of the Redevelopment Area despite its relatively small size.

EMPLOYMENT CHARACTERISTICS (2016)			
	WRA	**Wailuku CDP**	**3-Mile Radius**
Businesses	287	1,558	2,806
Employees	2,094	13,510	29,332
Size (in sq. mi.)	0.14	5.7	28.3
Businesses per sq. mi.	2,050	273	99
Jobs per sq. mi.	14,957	2,370	1,036
Top 3 Sectors	1. Public Administration: 26% 2. Health Care & Social Asst.: 16% 3. Professional, Scient. & Tech.: 10%	1. Health Care & Social Asst.: 22% 2. Public Administration: 18% 3. Construction: 8%	1. Health Care & Social Asst.: 16% 2. Retail Trade: 13% 3. Public Administration: 10%

Source: Esri BAO



The chart on the prior page shows jobs by industry for all three geographies. The economic makeup of the Redevelopment Area is significantly different than the 3-mile radius, while the Wailuku CDP is somewhat of an average of the two. The predominant industry in the Redevelopment Area is Public Administration, with 533 employees, or more than a quarter of its total. Health Care & Social Assistance and Professional Services also are well-represented in the Redevelopment Area. Together, these three industries make up more than half of the Redevelopment Area's total employment.

In the Wailuku CDP, Health Care & Social Assistance is the largest industry, followed by Public Administration. In the 3-mile radius, jobs are spread more evenly across industries – a typical trend as the capture area gets larger and more jobs are included. The largest industry here is also Health Care & Social Assistance, albeit with only 16% of the total. Retail Trade is the second largest industry with this area including much of the large-format retail in Kahului. Another significant outlier is Real Estate, Rental & Leasing at 9%, the fourth largest industry in the 3-mile area.

LARGEST EMPLOYERS

The table to the right lists the largest private and nonprofit employers in Maui County, derived from Hawaii Business's Top 250 of 2016. Of the statewide top 250, 15 are on Maui, and majority of these are located in Kahului. Two are located in the Wailuku CDP – Maui Medical Group and Maui Economic Opportunity (a nonprofit community action agency), both of which have a presence within or adjacent to the Redevelopment Area. Combined, they employ over 500 people. Maui Soda & Ice Works was on the list in 2015, but fell out of the top 250 in 2016.

The largest public employers located within the Wailuku CDP (most of which are near but not within the Redevelopment Area) are the Maui Police Department, Wailuku Elementary School, Baldwin High School, Maui County Water Supply Board, and Maui Community Correctional.

In the next chapter, there is a detailed inventory of retail in the Redevelopment Area to determine what the largest retail sub-categories.

LARGEST PRIVATE AND NONPROFIT EMPLOYERS (2016)

Company	Statewide Rank	Employees (2015)	Location
Jim Falk Automotive Group	23	330	Kahului
Grand Wailea (Hilton Worldwide)	50	N/A	Kihei
Four Seasons Resort Maui at Wailea	55	650	Wailea
Hawaii Petroleum Inc.	58	218	Kahului
Dorvin D Leis Co. Inc.	63	395	Kahului
VIP Foodservice	86	150	Kahului
Haleakala Solar Inc.	148	140	Kahului
Maui Medical Group Inc.	151	259	Wailuku
Hale Makua Health Services	166	392	Kahului
Maui Land & Pineapple Co. Inc.	202	N/A	Lahaina
MKC Hawaii	213	N/A	Kahului
Maui Clothing Co. Inc.	216	101	Lahaina, Kihei
Maui Economic Opportunity, Inc.	224	250	Wailuku
Wailea Golf LLC	241	85	Wailea
Exceptional Inc. dba Employers Option	243	1,014	Kahului

Source: Hawaii Business Top 250 2016

OFFICE & INDUSTRIAL REAL ESTATE

According to Colliers International Hawaii's Maui Market Year-End 2016 Report, Maui has been experiencing a soft office market over the past several years. It has approximately one million square feet of inventory and a vacancy rate that surpassed 20% in 2016. This is the seventh consecutive year of lost occupancy, and the highest vacancy rate in 15 years. In 2016, the Wailuku CDP had an office vacancy rate of 16%, versus 8% in Kahului and 31% in Kihei.[12]

The Redevelopment Area's office market is buoyed by County government offices and many of Maui's professional businesses that complement the public sector, compared to other parts of the island.[13] Demand for office in the Redevelopment Area is depressed by limited parking, according to stakeholder interviews. Where parking is available within the Redevelopment Area, office rents are stronger than in other parts of the Wailuku CDP or Kahului. Office leases range from $1.25 to $2.00, plus $0.65 net operating in the Redevelopment Area.

Conditions of Maui's industrial market are a stark contrast to the soft office market. Vacancy rates are very low countywide. According to the Colliers International report, there is a "severe shortage" of available space. The Wailuku CDP had a 2.4% vacancy rate, while Kahului had 1% vacancy. Much of the industrial space on the island is concentrated around Kahului Harbor, and mostly occupied by wholesalers.[14] The development pattern and lot size in the Redevelopment Area make it a poor fit for industrial land uses.

[12] Colliers International Hawaii, Maui Market Year-End 2016 report

[13] Ibid.

[14] Ibid.

RETAIL

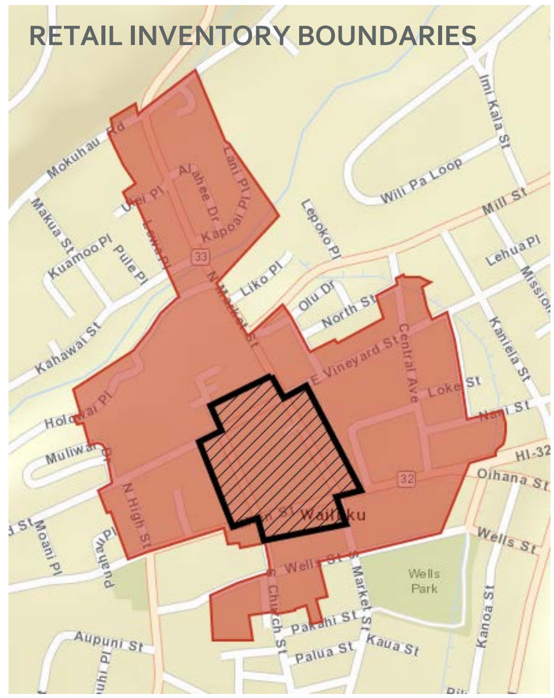
The success of the Wailuku Town Redevelopment Area is in large part driven by the success of its retail mix. This section begins with a detailed inventory of existing Redevelopment Area retailers, conducted on-site in April 2017. It then examines retail real estate conditions in Central Maui, competitive retail environments in the region, and retail spending amongst residents and visitors.

RETAIL INVENTORY

The retail inventory was conducted on-site in April 2017. A similar inventory was completed in February 2010 as part of the Wailuku Redevelopment Area Market-Based Plan that P.U.M.A. also conducted. Individual retailers within the Redevelopment Area were categorized into retail sectors consistent with the 2010 inventory so comparisons could be made between 2010 and 2017 retail conditions.

In addition to a Redevelopment Area inventory, there is also a more detailed property inventory for the area immediately surrounding the Parking and Events Facility project site. This area, referred to below as the project site superblock, includes all ground-floor uses along both sides of the street surrounding the project site (Market, Vineyard, Church, and Main).

Both of the areas that were inventoried are shown in the map to the right (Redevelopment Area in red; superblock in black). Findings and observations are laid out below. Following the findings are the detailed inventory tables for both the Redevelopment Area and superblock.



Redevelopment Area – Basic Retail Conditions:

- There are 96 existing retailers in the Redevelopment Area.
- The total square footage of these businesses is approximately 125,000 square feet. This averages to 1,300 square feet per retailer (although there is a wide range in size from 150 to 7,380 square feet).
- There are 14 vacant retail units, at a total of 20,000 square feet. Most vacancies were on Market or Main. The retail vacancy rate is 14%.
- Virtually all of the retail is concentrated between Main and Vineyard, from Central to Church; with Market as the primary corridor. The most significant exception is that the only existing market/grocery is located in Happy Valley.

Redevelopment Area – Findings by Category:

- The largest category of retail by square footage is **Leisure** (art galleries, bowling alley, crafts, sporting goods, etc.). This represents more than 30,000 square feet of the 125,000 square feet of total occupied space.
- Within the leisure category, the largest sub-category is **art galleries/framing stores**. There are seven art galleries in the Redevelopment Area, most of which are located on Market Street.

- The largest category by number of retailers is **Health & Personal Care**, with 29 businesses, or 30% of all occupied units in the Redevelopment Area.
- There are 16 full-service **restaurants, cafes, and fast food restaurants**. All of the fast food options are located on Main. The restaurants and cafes are clustered along Market and Vineyard. In addition, there are 3 bakeries (which are classified as specialty food stores).
- **Catering** was added as a category for the 2017 profile. Two businesses were classified as primarily catering. However, three other businesses that were classified as restaurants also have significant catering operations. So, although the table doesn't reflect it directly, there is a significant cluster of catering businesses in the Redevelopment Area.
- There are five **pawn stores**, all located along the most prominent retail block on Market Street.
- There are no **taverns or bars** in the Redevelopment Area. The restaurant, 808 on Main, has a liquor license. Several restaurants have a BYOB ("bring your own") policy as well. There is a bar and live music venue scheduled to open on Market later this year.
- Although there are no retailers classified primarily as **gift stores**, several retailers sell gifts/souvenirs as part of a larger selection of goods.

Redevelopment Area Retail Trends – 2010 vs. 2017:

- Overall, retail seems to be somewhat healthier than in 2010. There are 29 more retailers in 2017 than in 2010; however, the total number of vacant units hasn't changed. Therefore, retail is now accounting for more units in the Redevelopment Area than it was seven years ago.
- The starkest difference between 2010 and 2017 is the number of personal services (within the Health & Personal Care category). There are 27 now compared to 8 in 2010. The Redevelopment Area has clearly become a hub for salons, spas, massage and acupuncture therapists. Central Avenue is a popular location for these professional services businesses.
- Outside of Health and Personal Care, categories that saw significant increase in number of businesses between 2010 and 2017 are Leisure (+6) and Eating & Drinking (+5). Miscellaneous retailers (auto, florists, gifts, pawn shops) saw the largest decrease since 2010 (-3).
- The largest category of retail by square footage remains Leisure. This was also the case in 2010.
- The largest category by number of retailers was Leisure in 2010. While the number of Leisure businesses has increased to 20, the most in one category is now Health & Personal Care with 29 occupied units.
- The number of art galleries has increased from 2 in 2010 to 7 in 2017. While there is a growing arts cluster, several of these galleries are located either upstairs or along alleys/side roads, detracting from this cluster's visibility to shoppers and visitors.

Superblock Conditions:

Ground-floor uses along both sides of the street surrounding the project site (Market, Vineyard, Church, and Main)

- There are 43 retailers surrounding the project site. However, only a third of the square footage in this area is currently retail.
- Professional offices represent the largest amount of square footage amongst non-retail uses. There is also a significant number of institutional uses, namely theaters and churches.
- Several prominent parcels remain undeveloped, including three corner sites. One other corner site is currently vacant and available for lease.

Notes on how retail was defined:

- Two new categories were added that were not broken out in 2010: catering and home furnishings
- Many retailers could have been put in a couple different categories (such as a boutique that sells apparel, but also crafts and gifts). The predominant category was used in these cases.
- Personal services category is made up of: salons and barbers, spas, massage, beauty, acupuncture, tattoos, and yoga.
- Food court merchants were classified as fast food, and therefore, this category is not just made up of national chains.

2017 RETAIL INVENTORY - WAILUKU TOWN REDEVELOPMENT AREA

Source: P.U.M.A. on-site survey, April 2017

EXISTING RETAIL	2017		Change since 2010 (units)
	Estimated Square Feet	Number of units	
Food and Beverage Stores	**14,137**	**8**	**+2**
Market/Convenience	7,700	3	-1
Specialty Food Stores	6,437	5	+3
Eating and Drinking	**29,628**	**18**	**+5**
Restaurants/Cafes	15,648	9	+2
Fast Food	6,380	7	+1
Catering	7,600	2	n/a
Home	**6,200**	**4**	**-1**
Home Furnishings	3,180	2	n/a
Home Services/Supplies	3,020	2	-2
Building Materials/Hardware	0	0	-1
Apparel	**7,570**	**8**	**+1**
Apparel	4,960	5	+2
Watches/Jewelry	750	1	--
Footwear	1,260	1	--
Apparel Services	600	1	-1
Leisure	**32,754**	**20**	**+6**
Antique/Collectible/Second Hand	2,280	2	-3
Art Galleries/Framing	8,184	7	+5
Hobbies/Crafts	3,080	3	+2
Recreational Vehicles	4,400	1	--
Music	1,750	1	--
Pets	1,400	1	--
Sporting Goods	3,880	3	+1
Recreation	7,780	2	+1
Miscellaneous	**10,406**	**9**	**-3**
Automotive/Auto Aftermarket	5,442	4	-1
Florist	0	0	-1
Gifts	0	0	-3
Pawn Stores	4,964	5	+2
Health and Personal Care	**24,063**	**29**	**+19**
Personal Services	21,063	27	+19
Pharmacy	3,000	2	--
OCCUPIED SQUARE FEET / UNITS	**124,758**	**96**	**+29**
VACANT SQUARE FEET / UNITS	**20,371**	**14**	**--**
TOTAL SQUARE FEET / UNITS	**145,129**	**110**	**+29**

2017 RETAIL INVENTORY - PROJECT SITE SUPERBLOCK

Source: P.U.M.A. on-site survey, April 2017

RETAIL	*Estimated Square Feet*	*Number of units*
Food and Beverage Stores	**4,745**	**2**
Market/Convenience	2,750	1
Specialty Food Stores	1,995	1
Eating and Drinking	**11,179**	**11**
Restaurants/Cafes	7,229	5
Fast Food	1,950	5
Catering	2,000	1
Home	**1,680**	**1**
Home Furnishings	1,680	1
Apparel	**4,470**	**5**
Apparel	2,460	3
Watches/Jewelry	750	1
Footwear	1,260	1
Leisure	**13,394**	**12**
Antique/Collectible/Second Hand	2,280	2
Art Galleries/Framing	4,404	5
Hobbies/Crafts	1,680	1
Music	1,750	1
Sporting Goods	2,880	2
Recreation	400	1
Miscellaneous	**4,964**	**5**
Pawn Stores	4,964	5
Health and Personal Care	**6,833**	**7**
Personal Services	6,833	7
NON-RETAIL	*Estimated Square Feet*	*Number of units*
Professional/Office	52,318	13
Institutional/Religious	28,268	6
Bank	5,288	2
Lodging	2,700	1
Residential	800	1
TOTAL	*Estimated Square Feet*	*Number of units*
TOTAL OCCUPIED RETAIL	**47,265**	**43**
TOTAL OCCUPIED NON-RETAIL	**89,374**	**23**
TOTAL VACANT	**6,530**	**6**
UNDEVELOPED LAND	**24,672**	**4**

CENTRAL MAUI RETAIL REAL ESTATE

Generally, Central Maui has a soft retail market given the combination of: (1) recent and pending closings of big box retailers; (2) an expansion of inventory with some new shopping being built which has caused several major retailers to change locations within the market; and (3) already higher vacancy and lower rental rates compared to Maui as a whole.

Maui:

According to Colliers International Hawaii's Maui Market Year-End 2016 report, Maui had a retail vacancy of 11.9% in 2016 – the highest level in 17 years for the county.[15] In the fourth quarter of 2016, Maui had a total of 19 retail centers for a gross leasable area (GLA) of approximately 2.9 million square feet. Of this, about 235,000 square feet were vacant for a vacancy rate of 8% in the fourth quarter; nearly double the statewide average of 4.3%, but also an improvement over year-long averages.[16] Maui's average asking rate for retail space was $3.73/square foot/month, considerably lower than the statewide average of $5.73/square foot/month.[17]

Central Maui:

Central Maui had an inventory of almost 1.5 million square feet of retail space, meaning about half of Maui's retail inventory is located in this sub-market. Central Maui's retail vacancy rate has been increasing, and was up to 14% for 2016 (a record high).[18] This number is at risk of increasing in 2017 with the recent vacated Lowe's and pending closure of Kmart. Most of the 2016 vacancies that added to the available inventory occurred at the Queen Ka'ahumanu Center, Maui Marketplace, Maui Mall, and Kahului Shopping Center (which are all individually profiled below). The average asking price for rent ranged from $2.39 to $3.67 per square foot, which is lower than both Maui and statewide averages. As a comparison to Central Maui's recent struggles, South Maui and West Maui have experienced modest occupancy gains and have lower vacancy rates.[19]

COMPETITIVE RETAIL ENVIRONMENT

The following retail corridors and centers (illustrated in purple on the map on the following page, with the Redevelopment Area illustrated in red) were identified as competitors with the Redevelopment Area for retail goods and services. Many are clustered in Kahului near growing residential communities, and along major island thoroughfares, namely Kaahumanu Avenue and Hana Highway. Notably, they are all also closer to the Kahului Airport, the predominant point of entry for visitors to the island. Brief profiles of each of these competitive retail nodes can be found following the map.

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[15] Colliers International Hawaii, Maui Market Year-End 2016 report
[16] CBRE Research, Q4 2016
[17] Ibid.
[18] Colliers International Hawaii, Maui Market Year-End 2016 report
[19] Ibid.

Lower Main Street Corridor

This retail corridor is located along Lower Main Street, as well as Hookahi Street stretching north to Eha Street. Outside of the Redevelopment Area, this is where a majority of the retail is located in the Wailuku CDP. Lower Main is a lower density commercial corridor, with traditional strip centers and stand-alone retail along it. Retail offerings include primarily restaurants, specialty food shops, and bars. The Hookahi corridor includes much of the same, mixed in with some warehousing and other light industrial businesses, and also including a grocery.

Queen Ka'ahumanu Center

The Queen Ka'ahumanu Center is the largest single shopping center on Maui with a GLA of 571,225 square feet and 110 retailers located in an open-air format. The shopping center opened in 1972, with its latest renovation occurring in 2005. There is another anticipated renovation scheduled to happen sometime in 2017. It is located along Kaahumanu Ave, in the heart of Kahului, less than two miles from the Redevelopment Area. It is anchored by Macy's and Sears, and also contains a mix of local and national shops, restaurants, a six-screen movie theater, a Foodland grocery store, and a variety of services/small offices. There is free wi-fi available throughout the center, and a children's play area is located on-site. Events such as festivals, community performances, and Hawaiian cultural entertainment are regularly hosted (300+ annually) at the Queen's stage in Center Court.

Maui Mall

Maui Mall, built in 1971, recently transferred ownership and expanded to 235,000 square feet. As of early 2016, it was 91% leased.[20] It contains 13 restaurants (chain and local fast casual), a large movie theater, local and

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[20] http://www.jllipt.com/content/pdf/Maui_Mall_Press_Release_Final.pdf

national shops, and services such as salons, fitness studios, and professional offices. Anchor tenants are Longs Drugs and Whole Foods, as well as Regal Cinemas and a stand-alone TJ Maxx (which is a newer tenant, opened mid-2015). Several County government offices are located here, including the Real Property Tax office. (However, these are expected to move out and be consolidated in the new County Services Center.) The mall also regularly holds events and programming in an outdoor staged area.

The area surrounding Maui Mall is also currently being converted to retail. The Maui Clinic building next door is being transformed into a retail center, after it changed ownership in January 2017. The building is 16,642 square feet, and has been used as medical offices and clinics for decades. Retail spaces are being advertised for $2/square foot/month, plus expenses.

Kahului Shopping Center
Built in 1951 as Maui's original shopping mall, Kahului Shopping Center is located on Kaahumanu Avenue, across Puunene Avenue from Maui Mall. It is a small retail center, approximately 50,000 square feet in size, with a mix of small restaurants and shops. There are no major anchor tenants. As of 2010, this was planned for redevelopment into the Kahului Town Center, a mix of residential condos, retail, and office; but this project has stalled and its current status is unknown.

Maui Lani Shopping Center
Maui Lani Shopping Center is a smaller shopping center anchored by Safeway, located at the intersection of Kaahumanu Avenue and Maui Lani Parkway. It only has a handful of tenants and just over 100,000 square feet (a majority of which is dedicated to Safeway). It opened in 2013 and has gradually been leasing up space since then. This is the closest shopping center to the Redevelopment Area, which is located only a half mile west.

Hana Highway and Dairy Road Corridors
Hana Highway is a mixed retail corridor stretching from its convergence with Kaahumanu Avenue to its intersection with Dairy Road; a stretch that's a little less than a mile long. This corridor includes a variety of auto dealerships and other auto-oriented businesses, warehouses and wholesalers, several sporting goods retailers, and a small mix of other specialty shops.

The Dairy Road corridor stretches from its intersection with Haleakala Highway to Airport Road, and like the Hana corridor is also less than a mile long. Other than Maui Marketplace (discussed in more detail below), this corridor has a wide mix of retail. It is bookended by Costco on the northern end, and Home Depot and Walmart to the south. In between, the corridor has a mixed industrial/commercial/retail character that is unique in Central Maui. This eclectic environment is one that a growing number of small retailers are seeking nationwide as brick-and-mortar retail continues to evolve. Other than the big box stores, a majority of the retail is a mix of small-scale local and regional businesses. This includes local restaurants, a coffee shop, bar, and natural grocery, along with specialty shops.

The Dairy Road corridor is currently experiencing significant new vacancy with the recent spring 2017 closure of Savers and the announced June 2017 closure of Kmart (the island's first big box store).

Maui Marketplace
Maui Marketplace is a shopping center located along the Dairy Road corridor. It has lost its two anchors – Sports Authority and Lowe's – within the last year. Sports Authority closed its store after the company went bankrupt. Lowe's vacated its 77,000-square-foot location here for a nearby location at Pu'unene Shopping Center (discussed below). This new location is only 0.2 miles from the former in Maui Marketplace. Given these two

large closures, more than half of the center is currently vacant. The plan for these big box vacant spaces is to divide them into multiple smaller tenant spaces. Remaining tenants include a couple national retailers, fast food restaurants, and several local food vendors clustered in a small food court. Verizon and Petco are both current tenants, but have also announced moves to Pu'unene Shopping Center just blocks away, presumably closing their stores at Maui Marketplace as Lowe's did.

Pu'unene Shopping Center

This newer shopping center, located in the Maui Business Park with a main entrance from Hookele Street, is still being built out and filled in with retail. Upon full buildout, it will have 275,000 square feet of retail space. The center is anchored by Target which opened a couple years ago, and a brand-new Lowe's which relocated from Maui Marketplace a couple blocks away. Additionally, Planet Fitness and Verizon have announced openings here. Petco is listed as another anchor tenant, but has yet to open a store here (Petco currently has a store in the Maui Marketplace).[21] Although not technically in this shopping center, just across Ho'okele Street is Home Depot and Walmart, meaning this small stretch of street now has four major big box retailers, with significantly more land yet to be developed.

Ho'okele Shopping Center

This yet-to-be-built shopping center is also located in the Maui Business Park, on the opposite end from the Pu'unene Shopping Center. Construction is expected to begin in early 2018 and it is expected to have 94,000 square feet. It's announced anchor is Safeway.[22] There are already several other Safeways nearby, and it is unknown if any of these are at risk of closing with the opening of this new location.

Paia Town

Paia is a historic coastal town that was the center of the sugar industry until 2000. It is approximately 10 miles from the Redevelopment Area along the Hana Highway, at its intersection with Baldwin Avenue which leads upcountry. Paia's location on the ocean in close proximity to world-renowned windsurfing has turned it into a popular and bustling, yet laid-back town. It has an eclectic mix of local retail including shops, boutiques, art galleries, restaurants, bars, coffee shops, and a local grocery store. Paia Town is the most relevant comparable retail district on Maui due to its size, scale, relative proximity, and historical and local character.

RETAIL LEAKAGE & OPPORTUNITIES

Esri provides analysis of retail supply and demand, by industry, within customized geographies. Supply estimates sales by establishments in a given industry (based on the number of establishments). Demand estimates the expected amount spent at retail establishments (based on the area's population). The difference between these two values is the retail leakage or surplus.

Surplus in an area occurs when supply exceeds demand, meaning customers are being drawn in from outside the area. Leakage in an area occurs when demand exceeds supply. In other words, leakage is a measure of unmet demand for goods in a specified area by the residents of that same area. In general, leakage is an indicator of opportunity for new retail.

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[21] http://www.mauinews.com/news/local-news/2016/11/target-shoppers-will-soon-have-company-as-puunene-center-grows/

[22] http://www.mauinews.com/news/local-news/2017/02/safeway-to-anchor-new-shopping-center/

Retail leakage data shows modest unmet demand for the Redevelopment Area in only a few categories, while a majority of retail categories show a surplus. As a whole, there is approximately $17 million of *surplus* in retail. Notable categories of leakage are the following:

Retail Category	Estimated Leakage
General Merchandise	$1.5 million
Gas Stations	$0.5 million

Alternatively, according to the Esri analysis, notable categories where there is a surplus of retail in the Redevelopment Area include:

Retail Category	Estimated Surplus
Health & Personal Care	$5.9 million
Restaurants	$3.9 million
Motor Vehicle & Parts Dealers	$2.5 million
Food & Beverage Stores	$2.2 million

Non-Residential Demand

Retail Leakage analysis is based solely on spending by *residents* of the area, thus the above does not factor in the impact of demand and spending from *employees and visitors*. There are nearly 2,000 workers in the Redevelopment Area, which drive up demand for dining and other retail categories such as food and convenience stores. Tourism, Maui's leading economic sector, also has a major impact on the retail demand, particularly for dining and leisure shopping. Furthermore, tourism is a growing industry in Hawaii as a whole, where it has experienced five consecutive record-breaking years for visitor spending[23] (while resident retail spending has actually been decreasing[24]). Therefore, the importance of visitors on retail demand is only increasing given this trend. Overall, based on the workforce and tourism markets, it is likely that the Redevelopment Area still has room to grow in the retail and restaurant categories.

In 2016, Maui County visitors by air spent $4.5 billion. Statewide, visitors by air (which accounts for nearly all visitors) had personal daily spending of $206.50 in the first quarter of 2017. Of this, $28.10 (13.6% of all daily spending) was spent on dining, and $25.90 (12.5%) on shopping (which includes clothing, jewelry, cosmetics, leather goods, Hawaii food products, and souvenirs).[25] Using these percentages and the $4.5 billion of total spending from 2016, this translates to $612.3 million spent annually by Maui visitors on restaurants; and $564.4 million spent annually by Maui visitors on shopping.

With over $1 billion spent annually on Maui in two areas – dining and leisure shopping – there is significant potential for the Redevelopment Area to support additional retail. In particular, these areas are a strong fit because of the scale, existing retail mix, and historical and local character of the Redevelopment Area (especially dining which would also likely capture the daytime employee population). Visitor preferences are shifting away from idealized and manicured experiences toward a desire for more "authentic" and local options. The Redevelopment Area is well-positioned to capture these visitors and their dollars.

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[23] http://mauinow.com/2017/04/28/maui-visitor-spending-grew-6-8-in-march-2017/

[24] Given the fact that total retail sales for Maui County have been declining since 2013 (via the Colliers International Hawaii, Maui Market Year-End 2016 report), it can be concluded that resident spending is at the root of this, counteracting the increasing spending from visitors.

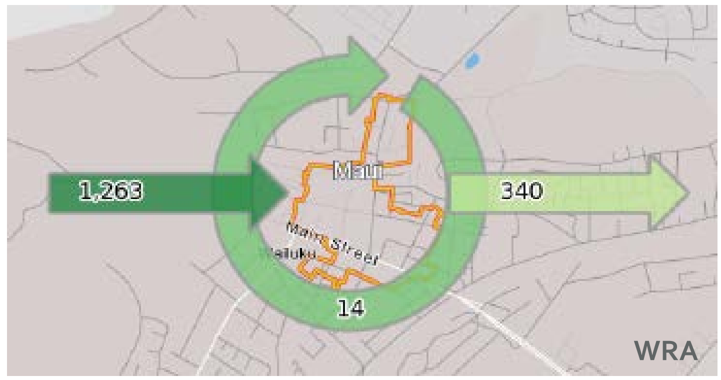
[25] http://files.hawaii.gov/dbedt/visitor/Air-Visitor-Spending-2017-YTD.pdf

TRANSIT AND COMMUTE

This section looks at commuting patterns, transit ridership, and traffic counts. The Wailuku Town Redevelopment Area has many commuters that impact the market demand for retail and real estate. Although the Redevelopment Area offers many jobs, a very low proportion of residents fill these jobs. A similar pattern is seen in the Wailuku CPD.

COMMUTE PATTERNS

As discussed in the Employment section, the Redevelopment Area is an economic hub for the region. The top graphic to the right illustrates[26] the very large group of workers who travel to the Redevelopment Area for work. Meanwhile, almost all of its residential population travels elsewhere for work, and a very small number of the working population that lives in the Redevelopment Area also works there. Therefore, the Redevelopment Area essentially has two in-place markets – the residential population and the daytime worker population, the second of which is both much larger and has higher disposable income.



Source: Census, onthemap.ces.census.gov/

The second graphic shows general commuting patterns in the Wailuku CDP. Here, there is a more balanced in-and-out commuting pattern, but still a proportionally low number of people staying in the CDP for both home and work. The percentage of population living in the CDP that works elsewhere on the island is 79%. A majority of CDP residents (63%) work in the service and retail industries. Many of these jobs are located in Kahului and the popular resort destinations.

TRANSIT RIDERSHIP NUMBERS

Starting in 2008, the County of Maui funded a public bus system that provides service to many Maui Island communities. The routes operate seven days a week including all holidays. The Wailuku Loop #1 and #2 (Reverse) are free routes that have four stops within the Redevelopment Area, operating 6:30 a.m. to 10 p.m. Total ridership for the Wailuku Loop route was 23,420 between January 2016 and January 2017, while ridership of the Wailuku Reverse Loop was 36,079. As the table on the following page illustrates, the Wailuku Reverse Loop route has significantly higher ridership than the Wailuku Loop route throughout the year, with peak ridership being in January. Overall ridership numbers increased substantially starting in October 2016. January

[26] These charts are used to illustrate commute patterns and not number of employees. The source of these charts is Census 2014 estimates. Employment estimates can be found in the Employment section, where the source is Esri 2016 estimates.

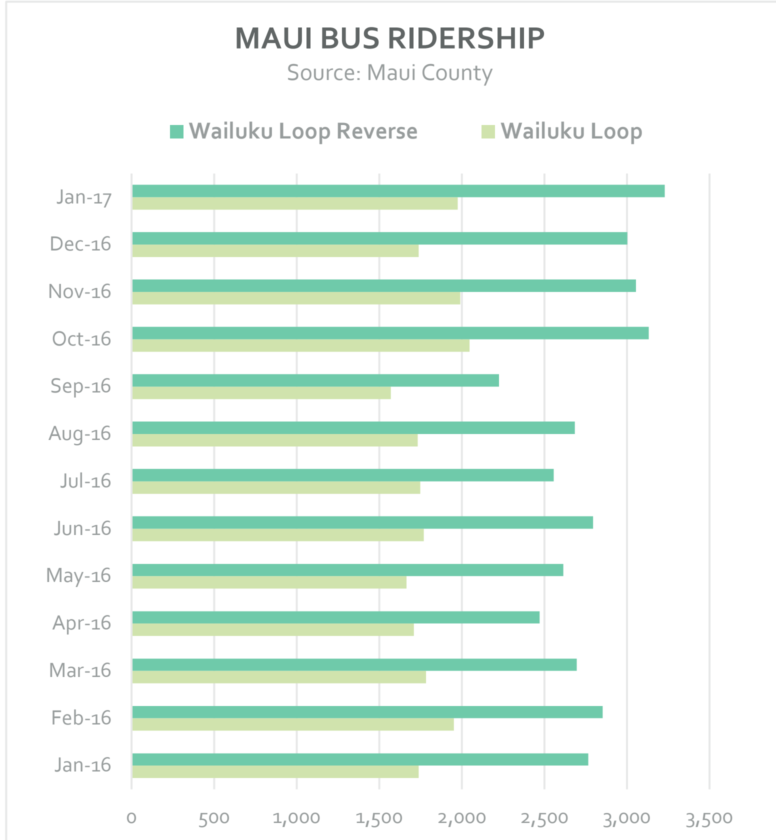
2017 had the highest combined ridership over the last year. Data is not available for boarding counts at specific stops.

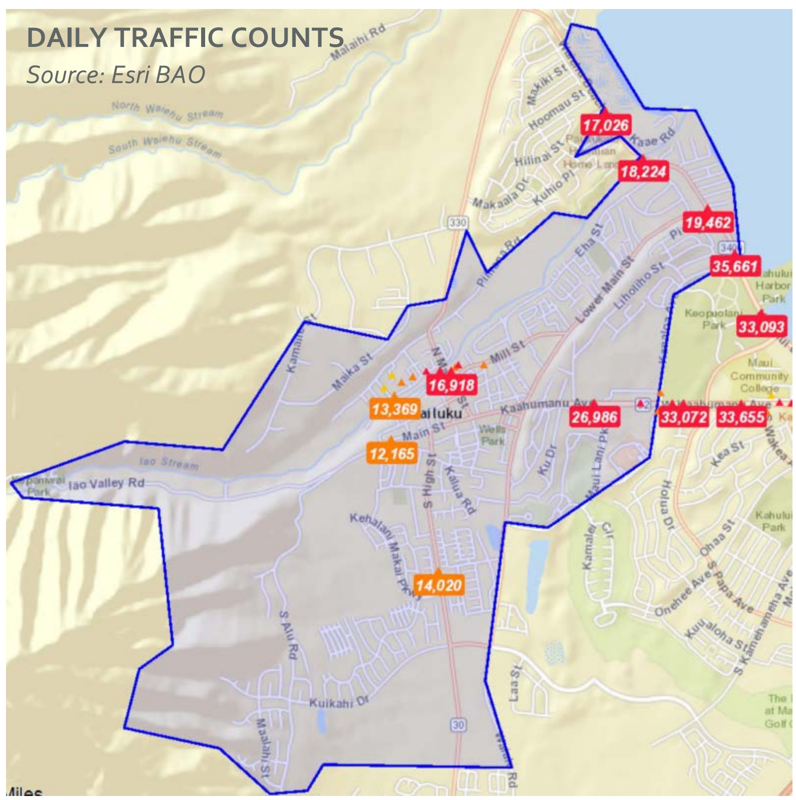
DAILY TRAFFIC COUNTS

Daily traffic counts are limited within the Redevelopment Area. Market Street (near Mill Street) has a volume of just under 17,000 cars per day. Traffic volumes are generally significantly higher toward (and in) Kahului. Kaahumanu Avenue sees traffic volumes of over 30,000 cars per day in Kahului. This number slowly drops as counts move west into the Wailuku CDP. The same road sees 27,000 cars daily near its intersection with Maui Lani Parkway on the eastern edge of the CDP. Then, once Kaahumanu Avenue changes to Main Street, traffic counts drop to 12,000 daily (near its intersection with High Street, west of the Redevelopment Area).

High variations in traffic counts indicate that within the small geography of the Redevelopment Area, some streets and sites have significantly more potential for retail and other uses that rely on visibility.

While most Wailuku CDP traffic is local versus visitor traffic, a portion of the higher traffic counts on Main street can be attributed to the 350,000+ annual visitors to 'Iao Valley State Monument, when the Park is open to the public. So, while visitors supplement the market demand for goods and services above resident-based estimates, their travel patterns in the Wailuku CDP today indicate very site-specific opportunity for businesses that would serve them based on convenience rather than as a destination.





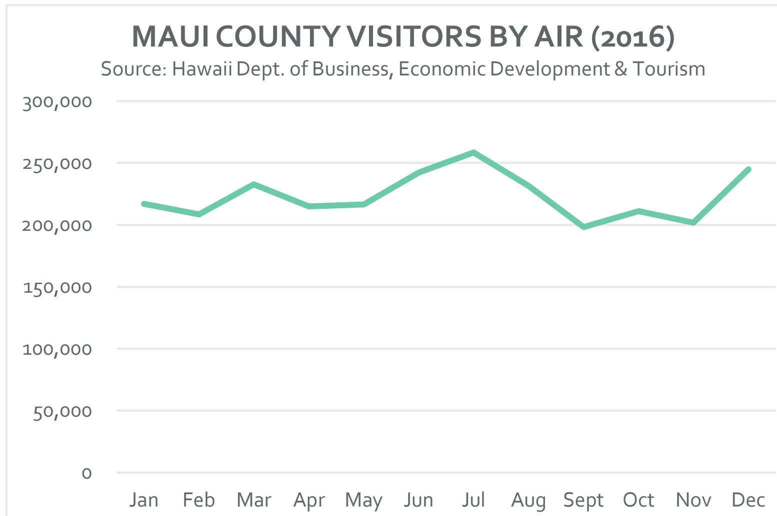
TOURISM

Tourism is the largest sector in the Hawaiian economy. The Wailuku CDP captures less of the tourism trade than other parts of Maui, but visitors do provide some market demand and opportunity. This section provides details on the economic impact of visitors on Maui, as well as the status of the hotel market.

VISITORS

The visitor industry is Maui's leading economic sector. Approximately 80% of every dollar is generated directly or indirectly by the visitor industry.[27]

In general, the state's tourism economy is healthy and growing. It has surpassed pre-recession levels and in 2016 set records in total visitor spending and arrivals. The state has experienced five consecutive record-breaking years for visitor spending.[28] In 2016, total visitor spending on Hawaii was $15.6 billion, an increase of 4% from the prior year.[29]



Maui benefits from consistent year-round tourism, with all but one month in 2016 seeing more than 200,000 visitors by air. July and December were the peak months, while September and November saw the fewest visitors.

Almost all visitors reach Maui by air, with a small fraction arriving by cruise ship. In 2016, Maui County had a total of nearly 2.7 million visitors by air. This was a 4% increase over 2015. Maui had the largest percentage increase in visitors in 2016 amongst the Hawaiian Islands. More broadly, visitor numbers have bounced back strongly since the recession – they've increased 41% since 2009. In total, 2016 visitors spent $4.5 billion, an 8% increase from 2015.

Through the first quarter of 2017, Maui tourism is on pace to surpass 2016 numbers. Visitor spending was up 2.7% and arrivals were up 1.2% compared to the first quarter of last year.[30]

Statewide, visitors by air had personal daily spending of $206 in the first quarter of 2017. This spending is allotted to the following categories[31]:

- Lodging: $96
- Food and beverage: $41
- Shopping: $26

[27] http://www.co.maui.hi.us/1133/Visitor-Industry
[28] http://mauinow.com/2017/04/28/maui-visitor-spending-grew-6-8-in-march-2017/
[29] http://www.hawaiitourismauthority.org/default/assets/File/December%202016%20final%20.pdf
[30] http://mauinow.com/2017/04/28/maui-visitor-spending-grew-6-8-in-march-2017/
[31] http://files.hawaii.gov/dbedt/visitor/Air-Visitor-Spending-2017-YTD.pdf

- Transportation: $19
- Entertainment and recreation: $17
- All other: $8

Nearly half of all daily spending is dedicated to lodging. Food and beverage and shopping together make up one third of all daily spending. Within the food and beverage category, dining accounts for $28 daily per visitor.

Personal daily spending by visitors is up 7% from this same time period in 2016. Lodging saw the largest jump (+13%), while shopping spending actually decreased slightly (-3%). Food and beverage and entertainment all saw modest increases in 2017.

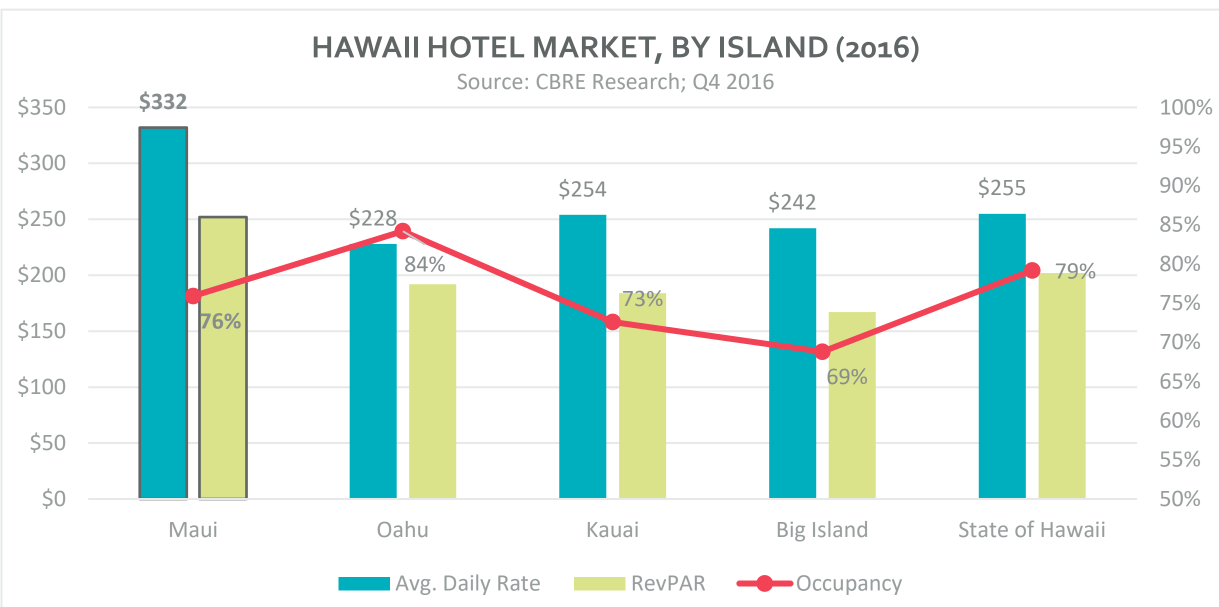
LODGING

Central Maui has just a few hotel options, none of which are located in the Wailuku CDP. Maui lodging is primarily found on the coast, clustered on the western coast near Lahaina and Kaanapali, and in the South Maui destination of Wailea-Makena. The only Wailuku CDP lodging options are several hostels and a bed & breakfast inn.

MAUI HOTEL MARKET		
	2015	**2016**
Average Daily Rate	$318	$332
RevPAR	$236	$252
Occupancy	74.3%	75.9%

Source: CBRE Research; Q4 2016

So, while visitor counts and spending are strong countywide, without much lodging nearby and given the location of major visitor destinations, Redevelopment Area businesses and cultural attractions must locate along major visitor travel routes or create new destination appeal in order to draw heavily from this growing sector. Currently, most market demand from visitors is based on convenience for those traveling through the Redevelopment Area, namely to visit the ʻIao Valley State Monument, rather than treating it as a destination in and of itself. New lodging options in the Redevelopment Area would help establish more of an in-place visitor market.



In 2016, Maui had the strongest hotel market amongst the Hawaiian Islands by a significant margin. Both its average daily rate and RevPAR are much higher, even with an occupancy rate slightly below state average. The average daily hotel rate on Maui[32] was $332 in 2016[33], a 4% increase from 2015. Occupancy also increased slightly from 74.3% to 75.9%, resulting in an increase in RevPAR ("revenue per available room," a hotel industry standard).[34] The newer Courtyard by Marriott in Kahului proves support for additional lodging in Central Maui. This hotel serves both the visitor and business markets – and anecdotally, rates and vacancy have been stronger than anticipated. Other than convenience to the airport, the Redevelopment Area is a more attractive environment, considering its walkability and historic appeal. The success of the Courtyard suggests market opportunity for a boutique hotel (those with fewer than 100 rooms) catering to business and other non-family travelers that aren't looking for a resort setting. Current development barriers, namely inadequate infrastructure, a lack of parking, and small parcel sizes, will need to be addressed to help encourage new lodging development.

[32] Lodging numbers were not available for Wailuku or Central Maui.
[33] This metric is significantly higher than the $96/day spent by visitors on lodging, as discussed earlier. The $96/day metric is a value of spending per *individual* visitor, whereas the average daily hotel rate is calculated by *room* rather than individual. In addition, presumably some visitors are not paying for lodging (those visiting friends or family), lowering the daily lodging spending, but not the average daily hotel rate. These are the primary reasons why these two, similar metrics are so different from each other.
[34] CBRE Research; Q4 2016

CULTURAL ATTRACTIONS

Maui is home to numerous natural, cultural, and historic attractions and facilities including museums, gardens, and parks which draw resident and visitor populations, as can be seen in the table below. The Redevelopment Area benefits from ʻIao Valley State Monument, a popular destination (when open to the public), and cultural offerings that bring visitors to and through the area.

ATTRACTIONS IN AND NEAR THE REDEVELOPMENT AREA

Attractions in or near the Redevelopment Area are highlighted in the table to the right. The ʻIao Valley State Monument is one of the most popular attractions on the island, and is critical in helping draw people to the Redevelopment Area. Due to severe flood damage to the valley, it closed indefinitely in September 2016, with June 2017 as the target for its reopening. Annual attendance at the Monument is not tracked regularly, but was estimated in 2010 at approximately 366,000 per year, making it one of Maui's most visited destinations. This landmark is all the more important, as it is the only main attraction for which visitors travel directly through the Redevelopment Area from the airport, harbor, or major lodging areas.

The Redevelopment Area also has a strong, growing arts and cultural cluster. The ʻIao Theater, located on Market Street, has seen significant increases in annual attendance over the last decade, from 18,200 in 2007 to 39,100 in 2016, a 115% increase. It holds five rotating main stage shows per year, equating to about 50 total performances. It also holds 12 youth performances and 8 Maui Chamber Orchestra performances per year. Community members can rent the space when not in use for concerts, film screenings, rehearsals, and other community events. There is a free playwriting series once a month, and New Hope Maui rents the space weekly for a church service.[35]

MAUI COUNTY CULTURAL ATTRACTIONS

	2013	2014	2015
Haleakala National Park	785,300	1,142,040	1,216,772
'Iao Valley State Monument*	(NA)	(NA)	366,000*
Whalers Village Museum	202,700	184,700	203,595
ʻIao Theater	(NA)	(NA)	39,100
Alexander & Baldwin Sugar Museum	36,680	34,899	34,370
Maui Historical Society Bailey House Museum	10,732	10,860	11,807
Baldwin Missionary Home Museum	14,463	13,390	11,170
Wo Hing Temple Museum	353	9,218	8,999
Hale Pai Printing House	12,259	490	479
Aquarium Maui/Maui Ocean Center	312,577	284,514	(NA)
Hana Cultural Center	(NA)	(NA)	(NA)
Kula Botanical Garden	34,275	(NA)	(NA)
Maui Arts & Cultural Center (MACC)	(NA)	(NA)	(NA)
Wailuku Town First Fridays	(NA)	(NA)	(NA)

Note: Highlights indicate attractions in or near the Wailuku Town Redevelopment Area

* from 2010 P.U.M.A. Market Profile

Source: State of Hawaii Data Book 2015; http://mauionstage.com/; 2010 Market Profile

[35] http://mauionstage.com/

Maui Academy of Performing Arts (MAPA) is also located in the Redevelopment Area. MAPA offers dance and other performing arts classes for youth and adults. In Fiscal Year 2016, it had approximately 3,000 annual enrollees in its classes. This is projected to increase to nearly 3,300 in FY 2017. MAPA also produces several plays each year, but currently holds most of its performances and programming at other various locations on the island such as the MACC. MAPA is in progress to convert an existing building in the heart of the Redevelopment Area into a 150-seat black box theater. Its completion is expected by the end of 2018.

The Maui Arts and Cultural Center (MACC) is a large multi-purpose arts center, located in Kahului. It has several performance venues, including: the 5,000-seat Alexander & Baldwin Amphitheater, a flexible indoor-outdoor venue; the Castle Theater, a 1,200-seat indoor venue; and the McCoy Studio Theater, a multi-purpose 300-seat indoor venue.[36] The MACC hosts a wide range of events large and small, such as musicians, performance theater, comedians, and various types of festivals.

[36] http://mauiarts.org/

CURRENT DEVELOPMENT

A majority of development occurring in Central Maui is residential. This development pattern aligns with the fact that the housing market is very tight with rapidly rising costs, while the commercial market is currently soft in Central Maui, as discussed in prior sections. This section identifies current residential and lodging development projects committed and planned in Central Maui.

WAIHE'E-WAILUKU-KAHULUI PROJECTS

The table to the right identifies details on individual projects in the Waihe'e-Wailuku-Kahului area. As of May 2016, there were 22 committed (i.e., entitled) projects in the Waihe'e-Wailuku-Kahului area. Of these, almost all were residential developments. In total, there were 1,272 new single-family units and 1,550 new multi-family units committed in the area. There was one hotel project – an addition adding 136 units to a hotel in Kahului.

There were also five partly entitled projects, all of which were single-family residential developments, expected to bring 360 new units to the area. Finally, there was one planned project – the Pu'unani Residences – expected to create 150 single-family and 450 multi-family units.

In total, the above development projects are projected to bring 1,782 single-family units, 2,000 multi-family units, and 136 lodging units to this area of Maui.

WAIHEE – WAILUKU – KAHULUI DEVELOPMENT PROJECTS 2016

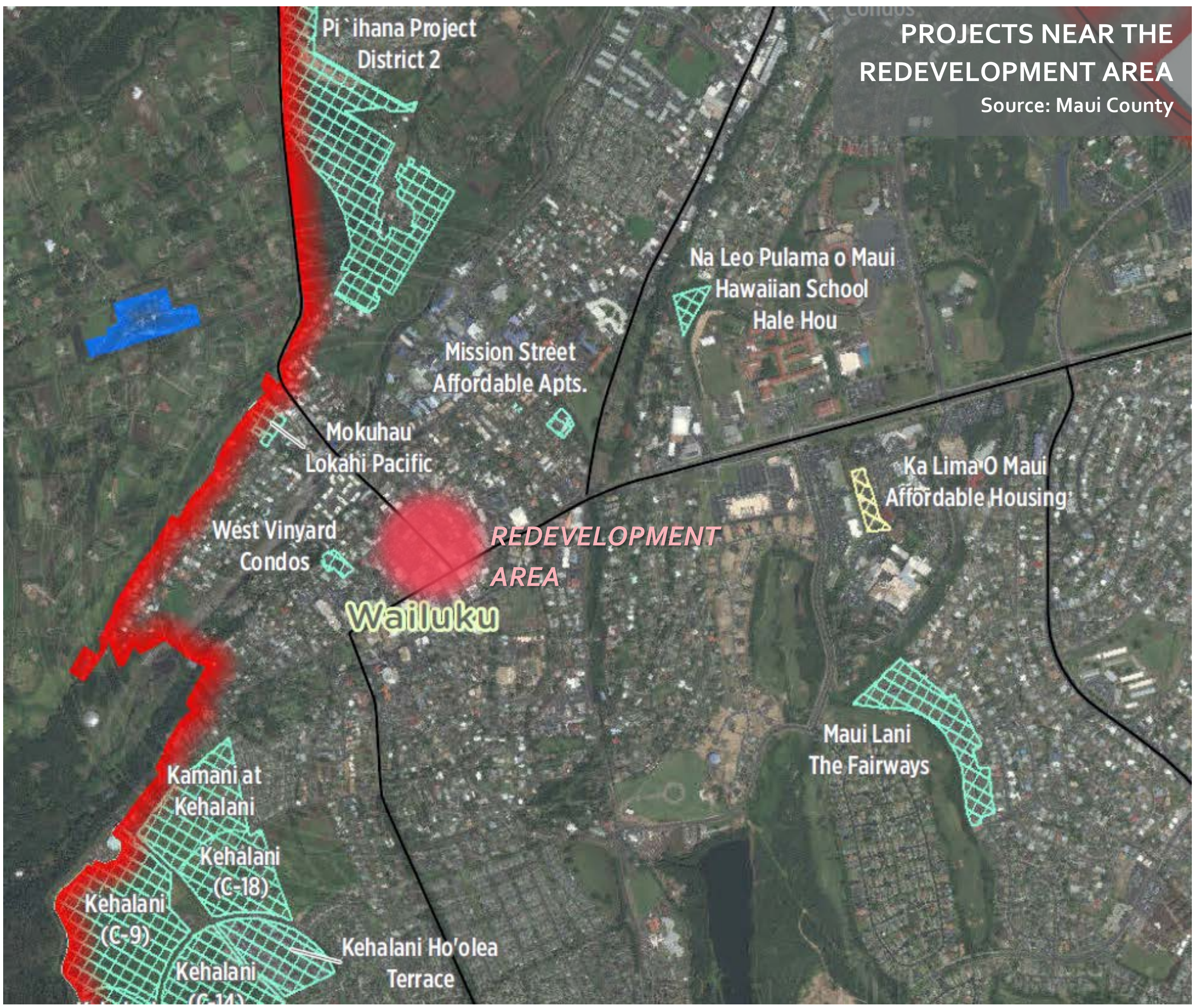
Project Name	Single Family	Multi Family	Time Share & Hotel
Committed (Entitled)			
Aina o Kane Apartments	0	0	0
Hale Mua	466	76	0
Kamani at Kehalani	0	112	0
Kehalani (C-3)	30	0	0
Kehalani (C-6)	0	80	0
Kehalani (C-7)	35	0	0
Kehalani (C-8)	0	84	0
Kehalani (C-9)	90	0	0
Kehalani (C-12)	150	0	0
Kehalani (C-13)	0	77	0
Kehalani (C-14)	80	0	0
Kehalani (C-18)	0	83	0
Kehalani Ho'olea Terrace	0	100	0
Kehalani Wai'olu Estates	60	0	0
Maui Beach Hotel Addition	0	0	136
Maui Lani Lot 4	0	238	0
Maui Lani The Fairways	50	0	0
Maui Lani Village	200	200	0
Mission Street Affordable Apts.	0	10	0
Mokuhau Lokahi Pacific	16	0	0
Pi' ihana Project District 2	95	440	0
West Vineyard Condos	0	50	0
Subtotal	1272	1550	136
Maui Island Plan & Comm. Plan (Partly Entitled)			
Habitat for Humanity Condos	0	0	0
Ka Lima O Maui Affordable Housing	0	0	0
Maui Lani Homes 1	240	0	0
Maui Lani Lot 7B	120	0	0
Maui Lani MF7 Condos	0	0	0
Subtotal	360	0	0
Maui Island Plan Only			
Pu' unani Residences	150	450	0
Subtotal	150	450	0
Combined Total	**1782**	**2000**	**136**

Source: Maui County Long Range Planning Division, May 2016

PROJECTS NEAR THE REDEVELOPMENT AREA

Projects within the Redevelopment Area vicinity are shown on the map below. There are three small residential development projects adjacent to the Redevelopment Area – West Vineyard Condos is the closest, expected to bring 50 multi-family units to the area; and Mokuhau Lokahi Pacific, which is expected to bring 16 single-family units. There is an affordable housing development – Mission Street Affordable Apartments – also within close proximity. This small project is scheduled to bring 10 new affordable multi-family units.

A little bit farther, there are two large residential projects. Kehalani, just southwest of the Redevelopment Area at the base of the West Maui Mountains, is a partially-built master-planned community scheduled to bring 2,400 residential units (both single- and multi-family) upon its completion. As of May 2016, it had 981 units committed. Pi'ihana Project District 2, located north of the Redevelopment Area, is another major entitled development. It will bring 535, mostly multi-family, units to the area once completed.



OPPORTUNITIES MOVING FORWARD

The above sections identified strengths, weaknesses, and current conditions in the Wailuku Town Redevelopment Area. To conclude, this section identifies opportunities that build on the area's strengths and address its weaknesses in order to enhance overall market conditions. Following each general strategy are potential actions that could be undertaken to help the Redevelopment Area reach its potential.

ENCOURAGE TENANT IMPROVEMENTS

- Ensure Zoning and Development Code is compatible with desired uses and the urban, historic character of the Redevelopment Area
- Increase awareness of expedited development review
- Improve emergency vehicle access for key properties with redevelopment potential
- Coordinate shared grease traps for key blocks and properties
- Improve building interiors to accommodate priority uses (e.g., restaurants and bars)
- Seek out developer and master leasing partners and make introductions to interested owners

ATTRACT NEW DEVELOPMENT AND USES

- Build the parking structure to address the existing parking shortage
- Consider allocating spaces in new structure to incentivize new investment and development
- Serve as liaison between new businesses and the County
- Partner with private owners and developers to bring desired uses to the Redevelopment Area, namely: dining, affordably-priced housing, boutique lodging, nightlife, entertainment, and a specialty food store
- Ensure County and State offices remain located in the Redevelopment Area, and that it continues as the professional center of Maui
- Revise or repeal the design standards to allow a wide range of design styles that fit the Wailuku CDP's history of cultural and economic diversity

ENSURE THE REDEVELOPMENT AREA IS CLEAN, SAFE, AND BEAUTIFUL

- Continue (and consider expansion of) the pilot Clean & Safe Program
- Enhance popular pedestrian ways (sidewalks, corridors, pathways) to improve walkability
- Incorporate additional streetscaping elements, such as benches, shading, street planter landscaping, lighting, and bicycle parking
- Activate ground floor uses, while encouraging office uses to locate on upper floors
- Improve wayfinding and connectivity between the core and the re-designed Wells Park

SUPPORT AND FURTHER ESTABLISH AN ARTS & CULTURAL NICHE

- Establish the Arts & Entertainment District outlined in the 2010 Market-Based Plan
- Build on success of First Fridays with additional events and programming in public spaces
- Target new funding sources from local and national arts foundations
- Provide targeted marketing and branding as an A & E District
- Encourage new programming for children

ENHANCE THE REDEVELOPMENT AREA'S IMAGE AND BRAND

- Sell the Area's "authenticity" to both locals and visitors
- Build on the "ReWailuku" brand
- Develop a larger website presence to market the area and events
- Provide better linkage to the visitor market that is seeking a unique experience on Maui that the Redevelopment Area can help fulfill

MITIGATE IMPACTS OF PEF CONSTRUCTION

- Identify and acquire temporary parking areas
- Test different mobility options during construction (i.e., car-share, bike-share)
- Offer incentives for businesses directly impacted by the construction
- Provide advanced communication of construction schedule and impact and proactively work with businesses to mitigate impacts

BOOST ORGANIZATIONAL CAPACITY TO HELP MOVE FORWARD

- Develop a Downtown Management Plan
- Identify sustainable source of funding to expedite implementation of the Plan
- Organize and dedicate staff to manage the above efforts
- Explore creation of a business improvement district to fund ongoing maintenance and marketing

WAILUKU TOWN SURVEY RESULTS

As part of the proposed Wailuku Town Parking and Events Facility planning and design process, Maui County and Progressive Urban Management Associates (P.U.M.A.) launched an online survey in April of 2017 to collect stakeholder input on priorities for the proposed facility and what brings people to Wailuku Town. As of May 8, 2017, 1,196 responses were received. The following analysis presents the survey's key findings and results and compares responses to a similar 2010 survey results, where applicable.

KEY FINDINGS

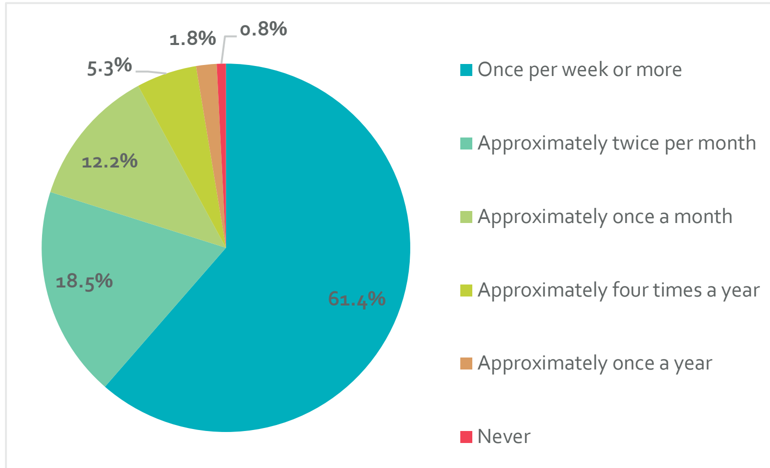
- The typical respondent was female, between ages 50-69, an island resident, with an income between $50,000 and $99,000, and visits Wailuku Town once per week or more, by car, for personal business and spends 1-2 hours there.
- Preferences and use patterns for existing and future facilities were largely consistent among age groups, gender, income levels and interest(s) in Wailuku Town.
- The top three responses for the most desired amenity to add in Wailuku Town are food trucks or outdoor market; plaza, park, or green space; and a children's museum or discovery center.
- The performance types respondents are most interested in are plays and musicals; pop or acoustic music; cultural programs; and children's/educational programs.
- The top three reasons respondents visit Wailuku Town are personal business; County/government business; and arts and cultural activities.
- Difficulty finding parking; lack of diverse retail; and traffic/congestion were the biggest reasons respondents did not visit Wailuku Town more often.
- Compared to 2010, survey respondents more likely to use a personal vehicle to get to Wailuku Town, and stay for less time once they are there. Other responses remained consistent, including frequency of travel to Wailuku Town, what amenities are used by respondents while in the study area, and how far respondents are willing to walk from where they parked to their destination. More respondents in 2017 indicated they drive, and since more respondents only stay in Wailuku Town for 1-2 hours, management strategies recommended in the 2010 plan and deployed since 2010, including 2-hour parking limits, have served the needs of people that want to visit for the short term very well.

SURVEY RESULTS

QUESTION 1: APPROXIMATELY HOW OFTEN DO YOU VISIT WAILUKU TOWN?

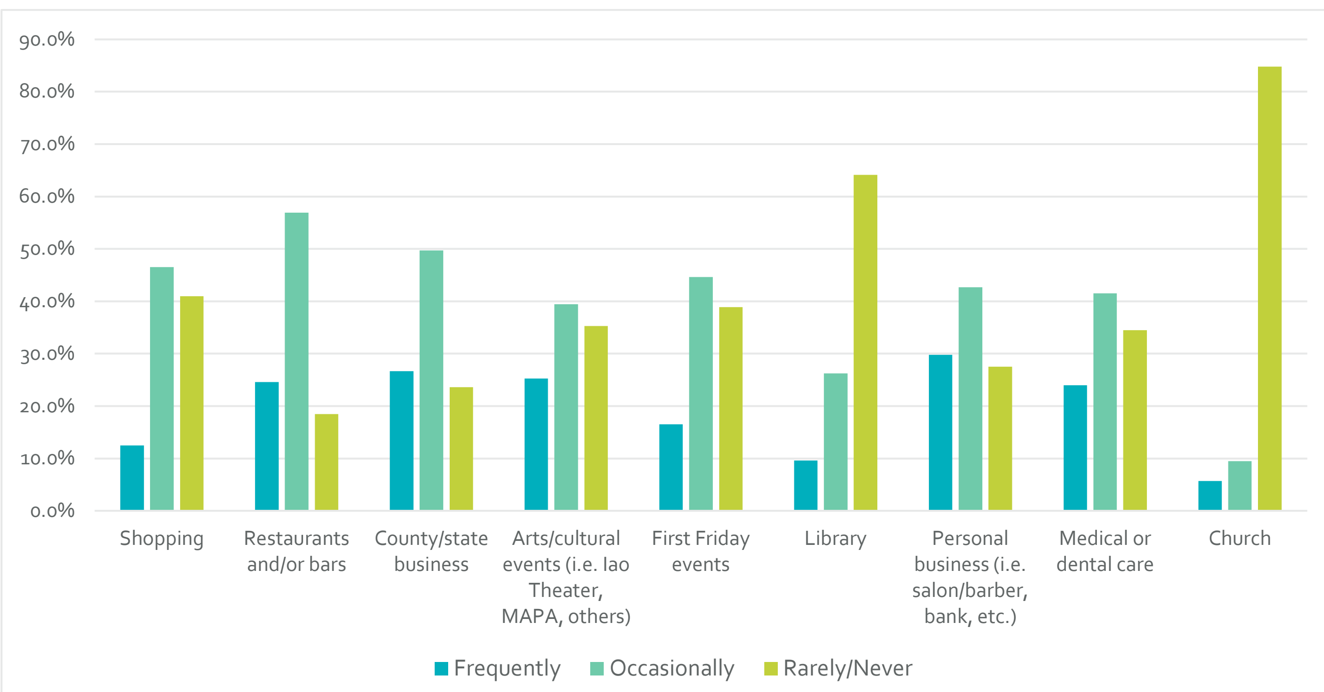
Respondents were asked how often they visit Wailuku Town in addition to visits for work. The majority of respondents answered once per week or more, 18.5% answered approximately twice per month, while 12.2% visit once per month.

These numbers are consistent with the results of the 2010 survey, in which 62.3% of respondents visited Wailuku Town once per week or more, 16.9% visited approximately twice per month, and 11.3% visited approximately once per month.



QUESTION 2: HOW OFTEN DO YOU VISIT WAILUKU TOWN FOR THE FOLLOWING ACTIVITIES?

Survey respondents were given nine activity options and were asked if they went to Wailuku Town for each activity 'Frequently', 'Occasionally', or 'Rarely/Never'. The graph below illustrates respondents' answers. Personal business (i.e. salon/barber, bank, etc.), 29.8%, had the most respondents select 'Frequently', followed by County/State business, 26.7%, and Arts/cultural events, 25.3%.

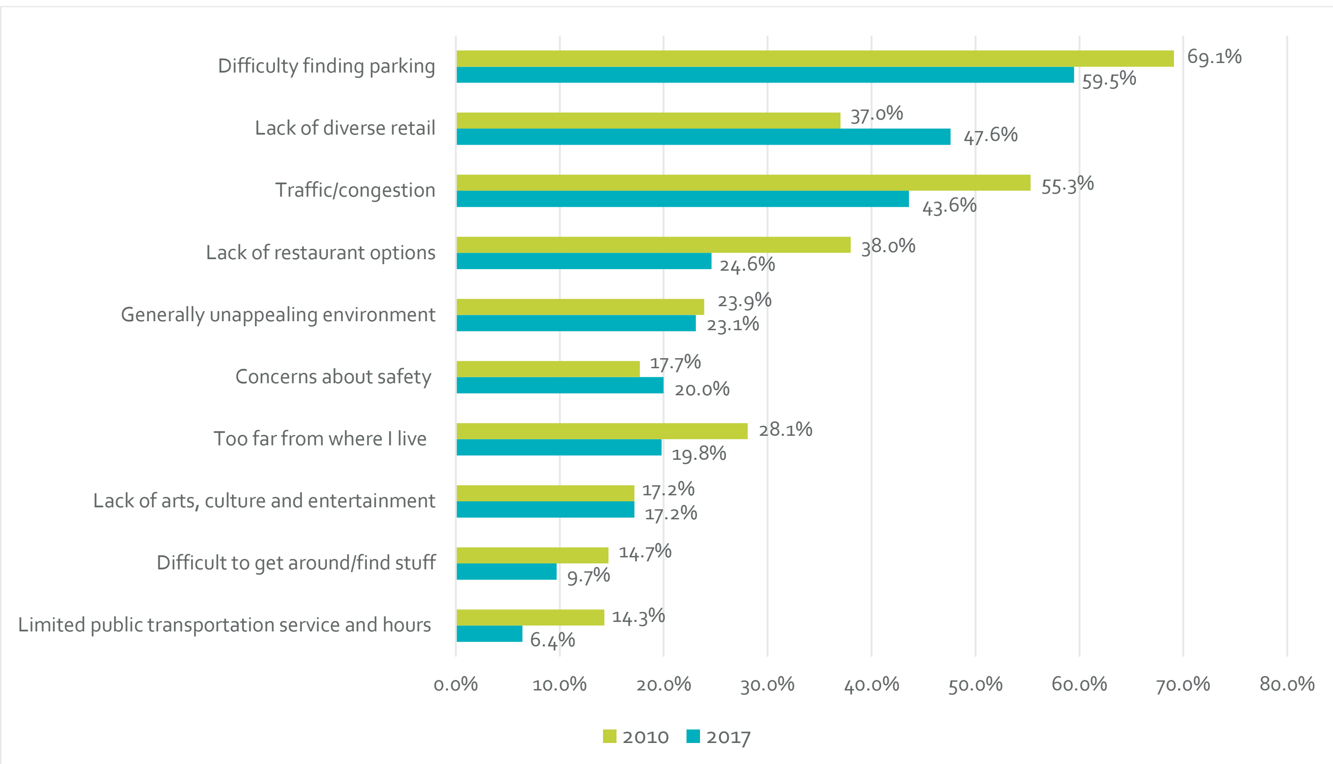


The activity that was selected by the most respondents as a reason to 'Occasionally' travel to Wailuku Town was restaurants and/or bars, followed by County/State business and shopping. The most respondents answered that they 'Rarely/Never' go to Wailuku Town for church, the library or shopping.

Since 2010, survey respondents' reasons for 'Frequently' visiting Wailuku Town have remained consistent, with the two most common reasons to go to Wailuku Town being personal business, followed by County/State business and medical or dental care. The most common reasons for 2010 respondents to 'Occasionally' go to Wailuku Town were restaurants, special events, and shopping. Similar to 2017, the most respondents selected church and library as a reason to 'Rarely or Never' go to Wailuku Town.

QUESTION 3: WHY DON'T YOU VISIT WAILUKU TOWN MORE OFTEN?

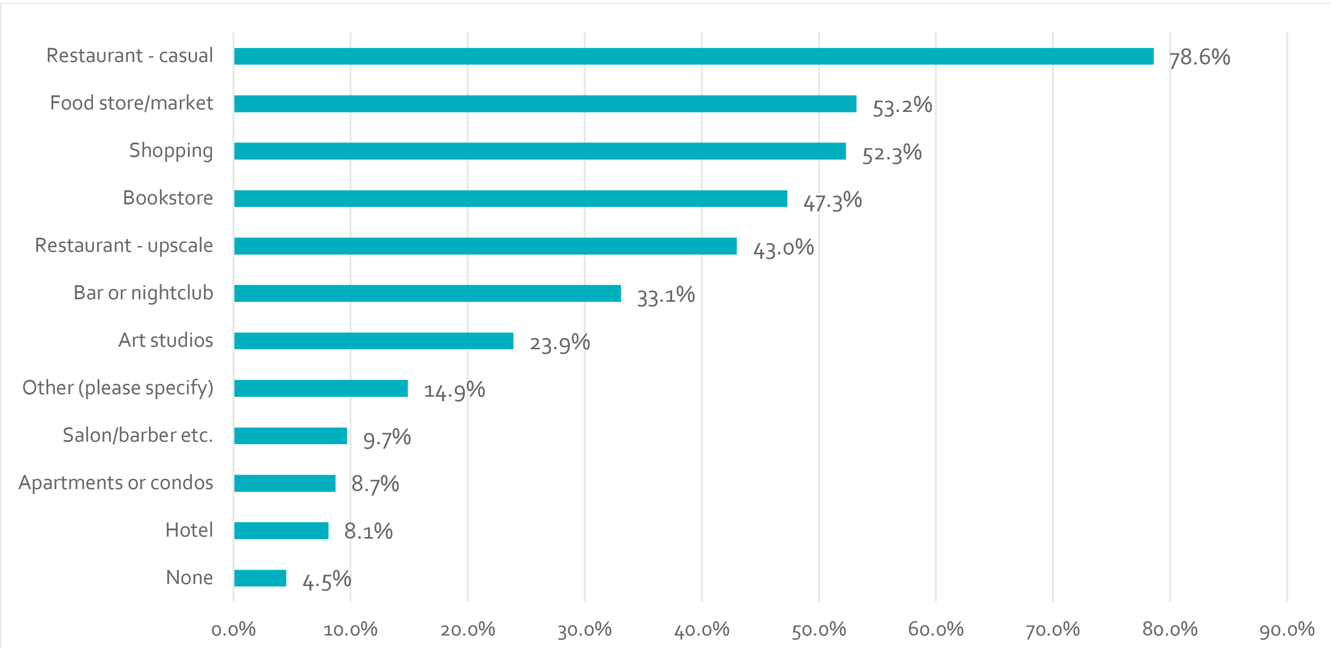
Respondents were asked what inhibits them from visiting Wailuku Town more often, and asked to select all options that apply. The most common response was difficulty finding parking, followed by a lack of restaurant options and lack of diverse retail. This is consistent with 2010 survey results, where respondents said difficulty finding parking, lack of diverse retail and traffic/congestion were the biggest reasons they did not visit Wailuku Town more often.



Recurring concerns entered in the 'other' response category include a lack of pedestrian infrastructure, limited hours of operation of businesses, the abundance of pawn shops in Wailuku Town, the cost of goods and services, and the presence of transient people. These concerns were voiced in the 2010 survey as well, particularly businesses' limited hours of operation and the presence of pawn shops.

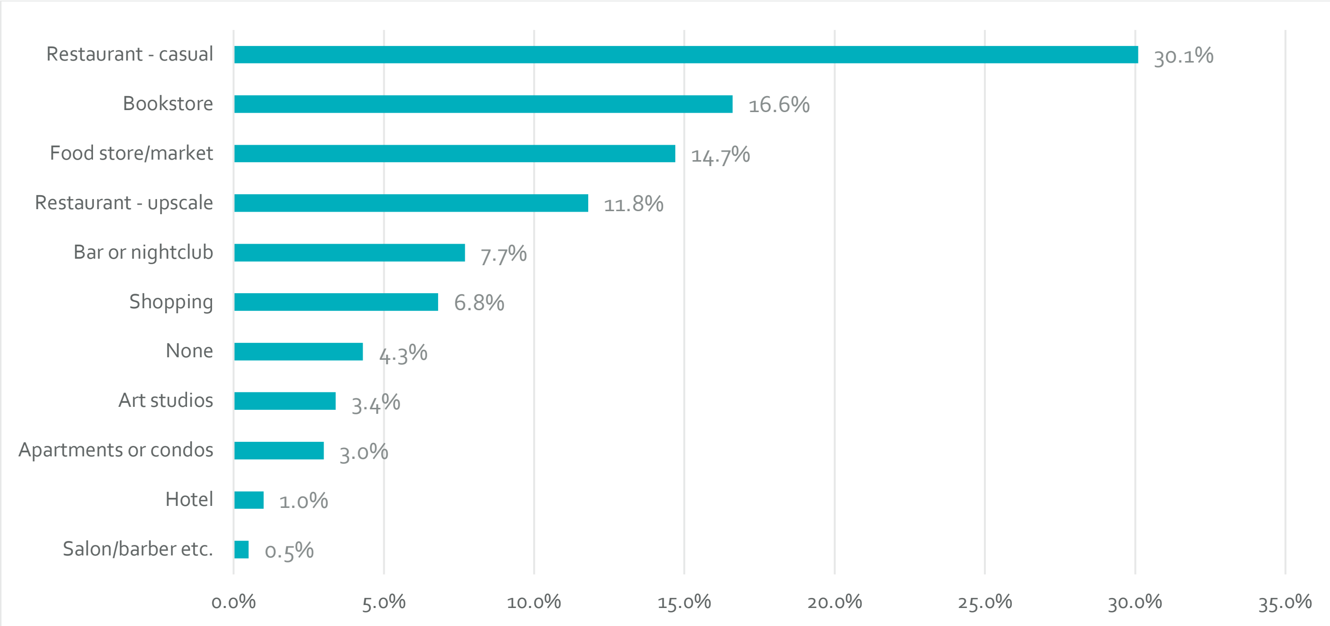
QUESTION 4: WHICH OF THE FOLLOWING WOULD BRING YOU TO WAILUKU TOWN ON NIGHTS OR WEEKENDS?

Respondents were asked to identify which amenities would bring them to Wailuku Town on nights and weekends, and to select all responses that apply. The most popular responses were casual restaurants, food store or market, and shopping. Responses in the 'other' category include activities for children, entertainment, activated public spaces, arts, theatre and cultural activities, and improved cleanliness and safety.



QUESTION 5: FROM THE USES IN QUESTION 4, WHICH ONE WOULD YOU MOST LIKE TO SEE ADDED IN WAILUKU TOWN?

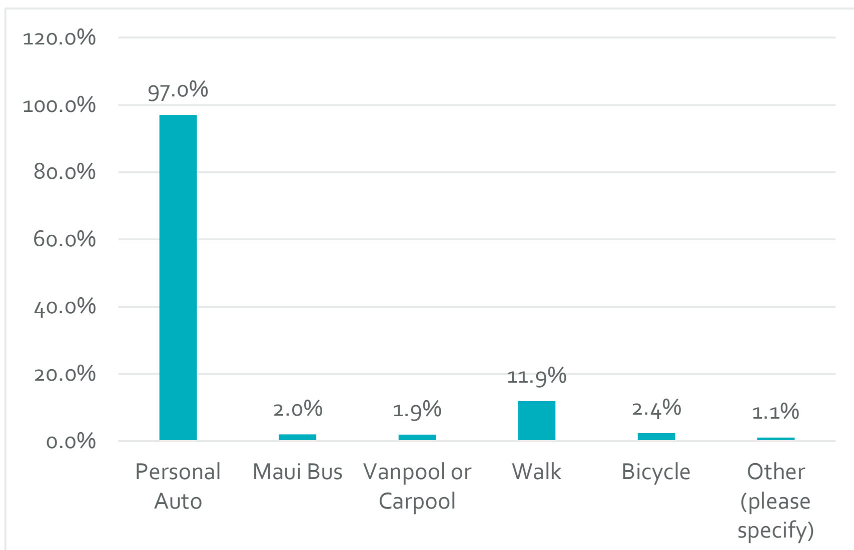
When respondents were asked to select what one use would bring them to Wailuku Town on nights and weekends, 30.1% of people selected casual restaurants. The next most popular use was a bookstore at 16.6%, followed by a food store/market at 14.7% and an upscale restaurant at 11.8%. Answers in the 'other' response category include a theatre or music and arts venue, public green spaces, and family-friendly gathering places, such as a bowling alley.



QUESTION 6: HOW DO YOU MOST OFTEN GET TO WAILUKU TOWN?

When asked to select up to two methods used to get to Wailuku Town, 97% answered that they use a personal vehicle.

This is a significant majority, and an increase from 2010, when 84.3% of survey respondents said they used a personal vehicle to get to Wailuku Town. All other methods of transportation to Wailuku Town have decreased since 2010, including walking which decreased from 15.4% in 2010 to 11.9% in 2017 and the Maui Bus which has decreased from 4.5% to 2.0%.



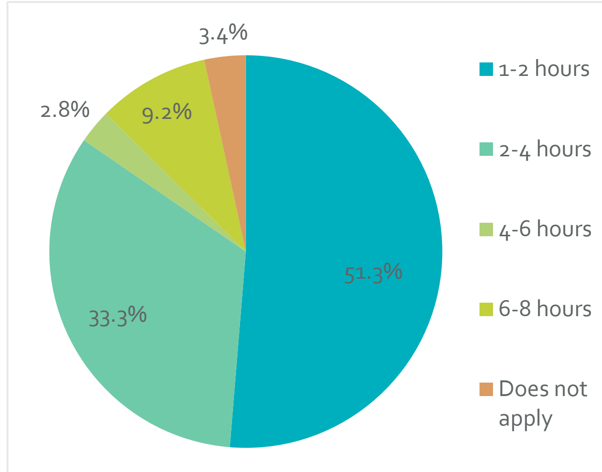
QUESTION 7: HOW DO YOU MOST OFTEN GET AROUND ONCE YOU ARE IN WAILUKU TOWN?

While few respondents use methods other than a personal vehicle to get to Wailuku Town, 72.9% of respondents use only walking to get around once they are in Wailuku Town. Use of a personal vehicle was the next most common response at 26.1%.

QUESTION 8: WHAT IS THE AVERAGE LENGTH OF TIME THAT YOU PARK IN WAILUKU TOWN?

When asked the average length of time they park in Wailuku Town, just over 50% answered 1-2 hours.

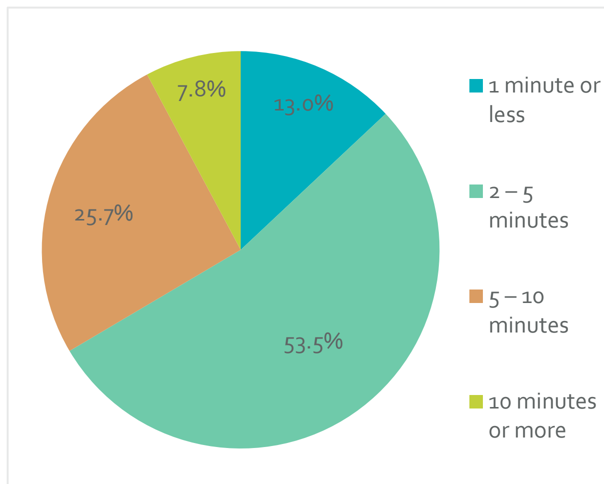
In 2010, 38.7% of survey respondents answered that they parked for 1-2 hours. A significantly higher proportion of respondents indicated they spent 6-8 hours parked in 2010 in Wailuku Town at 22.1%, compared to only 9.2% in 2017.



QUESTION 9: HOW FAR ARE YOU WILLING TO WALK FROM PARKING TO YOUR DESTINATION?

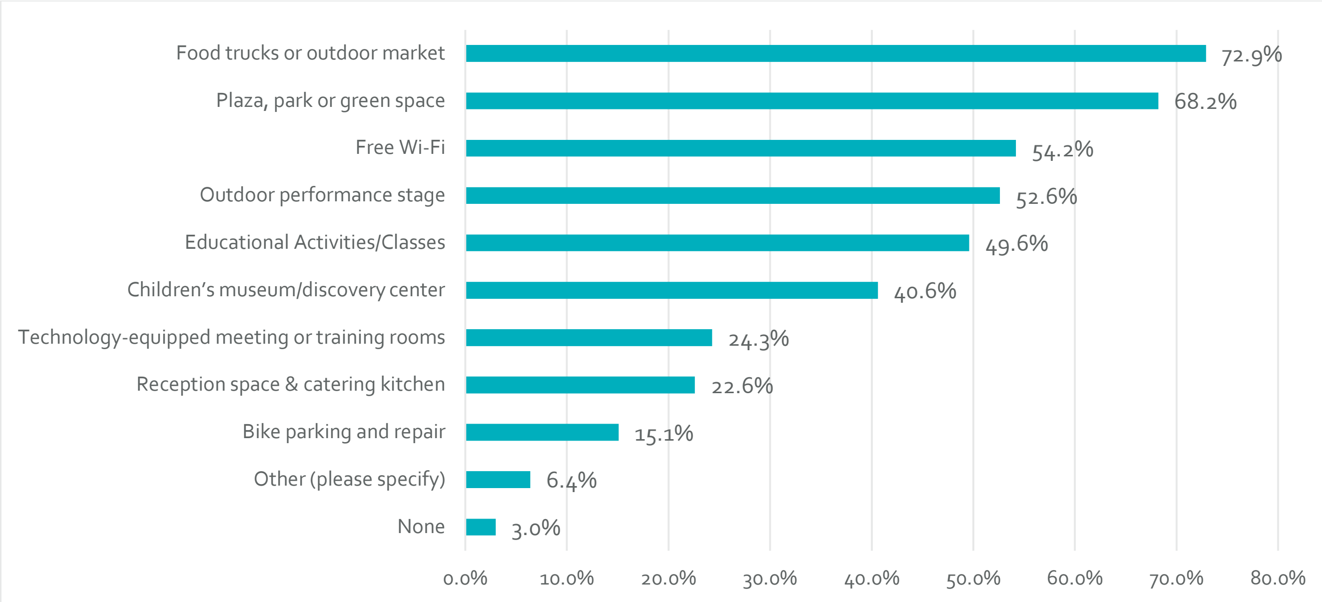
Survey respondents were asked to select one answer for how far they are willing to walk from where their car is parked to their destination. The majority answered they would walk 2-to-5 minutes, followed by 25.7% who would walk 5-to-10 minutes.

These responses are similar to those collected in 2010, when 55.5% of respondents indicated they would walk 2-to-5 minutes from their car to their destination, 24.1% answered 5-10 minutes, 15.3% answered 1 minute or less, and 5.2% answered 10 minutes or more.



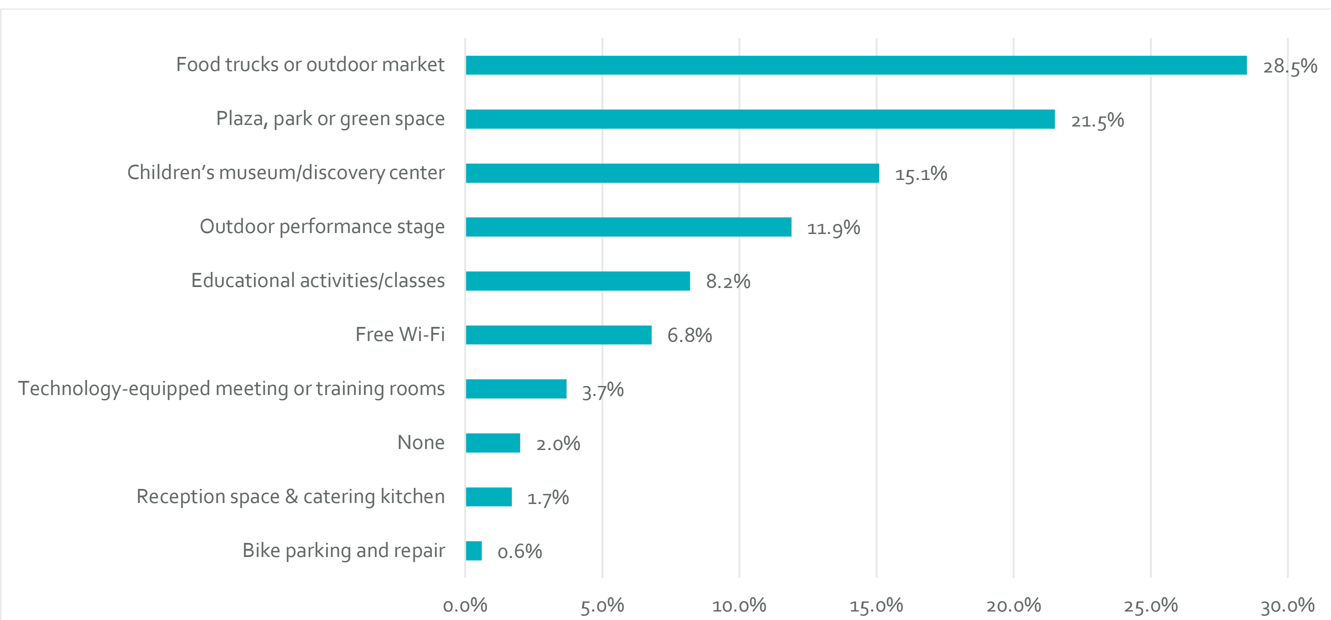
QUESTION 10: WHICH OF THESE WOULD YOU BE LIKELY TO USE IF THEY ARE PART OF THE PARKING & EVENTS FACILITY?

Respondents were asked to select all amenities they would be likely to use if included in the proposed Wailuku Parking & Events Facility. The most popular responses were food trucks or outdoor market, 72.9%, plaza, park or green space, 68.2%, and free Wi-Fi, 54.2%. Repeated responses in the 'Other' category include space for events and/or recreation and public restrooms.



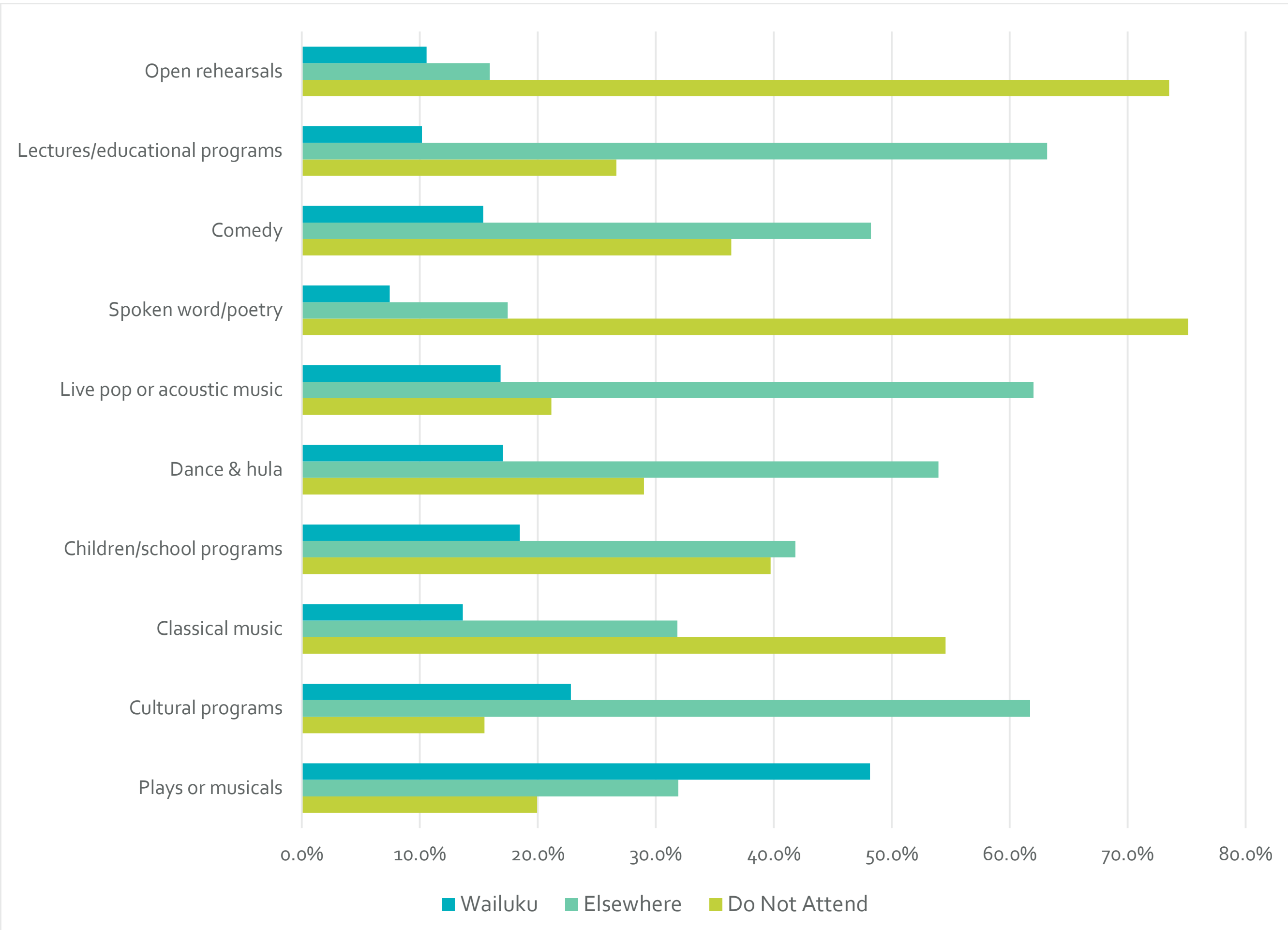
QUESTION 11: FROM THE ITEMS IN QUESTION 10, WHICH ONE WOULD YOU USE THE MOST?

Respondents were asked to select one amenity they would most likely use if included in the proposed Wailuku Parking & Events Facility. Food trucks or outdoor market had the most responses at 28.5%, 21.5% selected plaza, park, or green space, and 15.1% chose children's museum or discovery center. Interestingly, when asked to select all uses respondents would like to see included, the children's museum /discovery center was not in the top three responses, but when asked to choose one amenity, this use became more of a priority. Repeated responses in the 'other' category include Wi-Fi, a bookstore, additional parking, and recreational facilities.



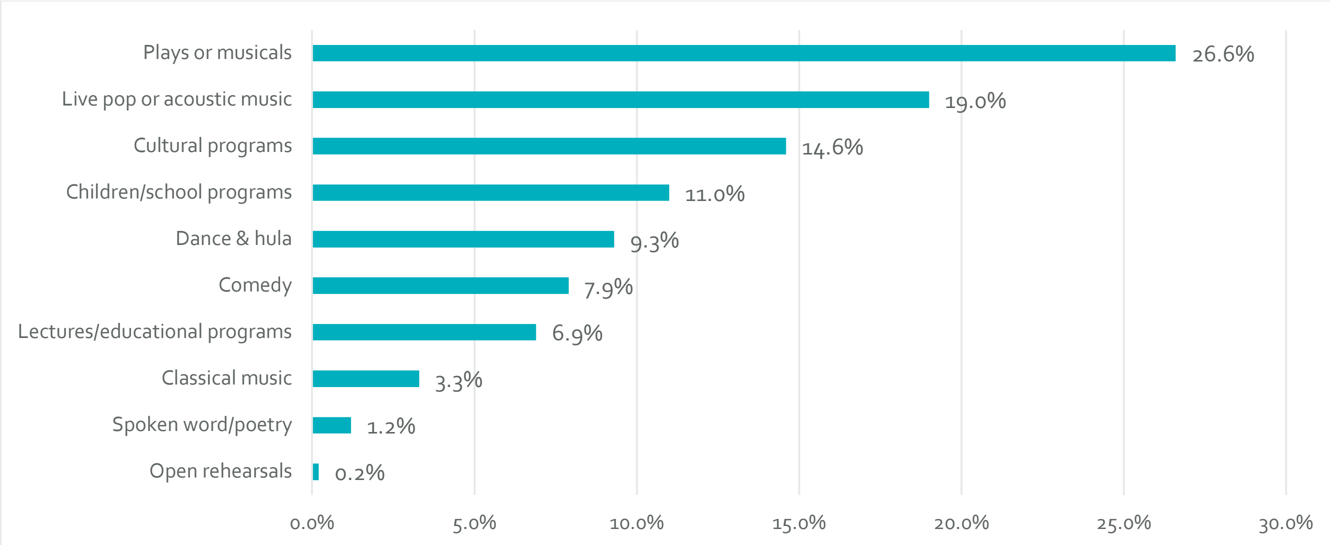
QUESTION 12: WHAT TYPES OF LOCAL PERFORMANCES DO YOU ATTEND, AND WHERE?

Respondents were asked to select whether they attend certain kinds of events and performances in Wailuku, elsewhere, or not at all. Plays or musicals are the most highly attended local performance, 48.2% of respondents attend in Wailuku, compared to 31.9% who attend elsewhere. The majority of respondents answered that they either attend local performances elsewhere or not at all, as can be seen in the chart below. In the 'other' category, however, many respondents indicated that they attend local performances both in Wailuku and elsewhere.



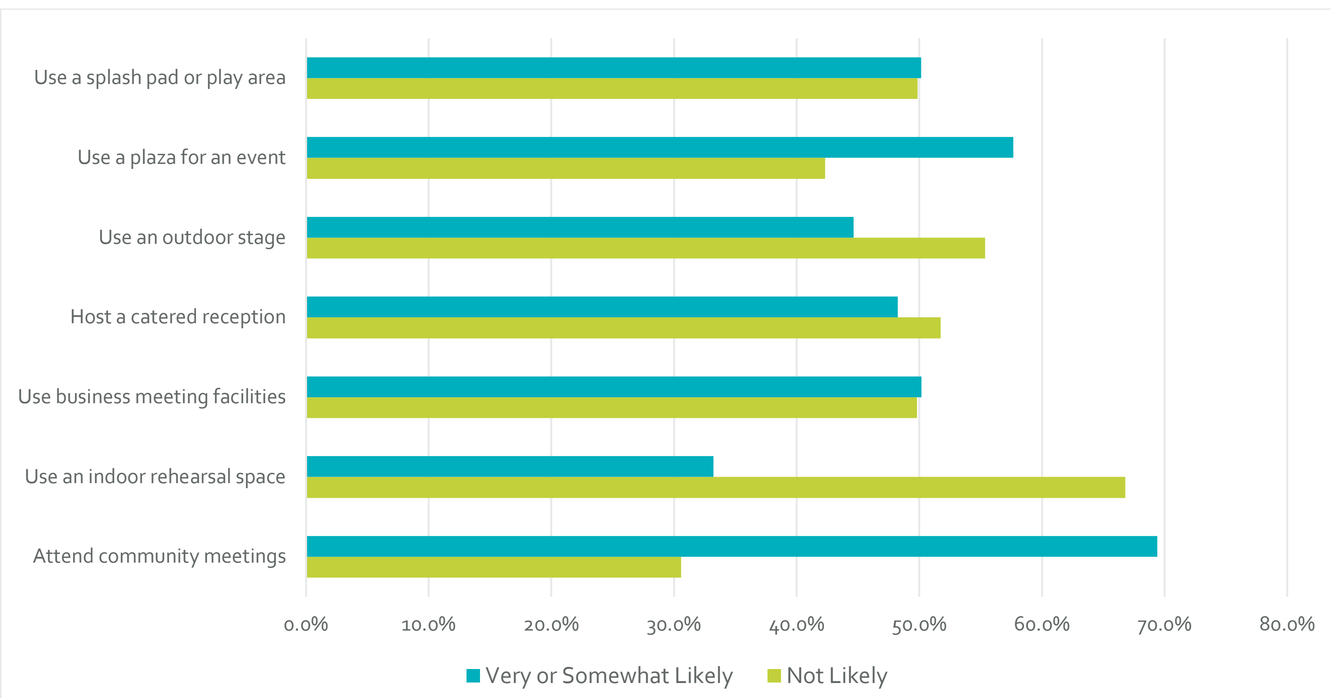
QUESTION 13: WHAT ONE PERFORMANCE TYPE FROM QUESTION 12 IS OF MOST INTEREST TO YOU?

When asked what one performance type is of most interest to respondents, the most popular response was plays or musicals, with 26.6%. The next most popular types of performances were live pop or acoustic music at 19%, cultural programs at 14.6%, and children/school programs at 11%.



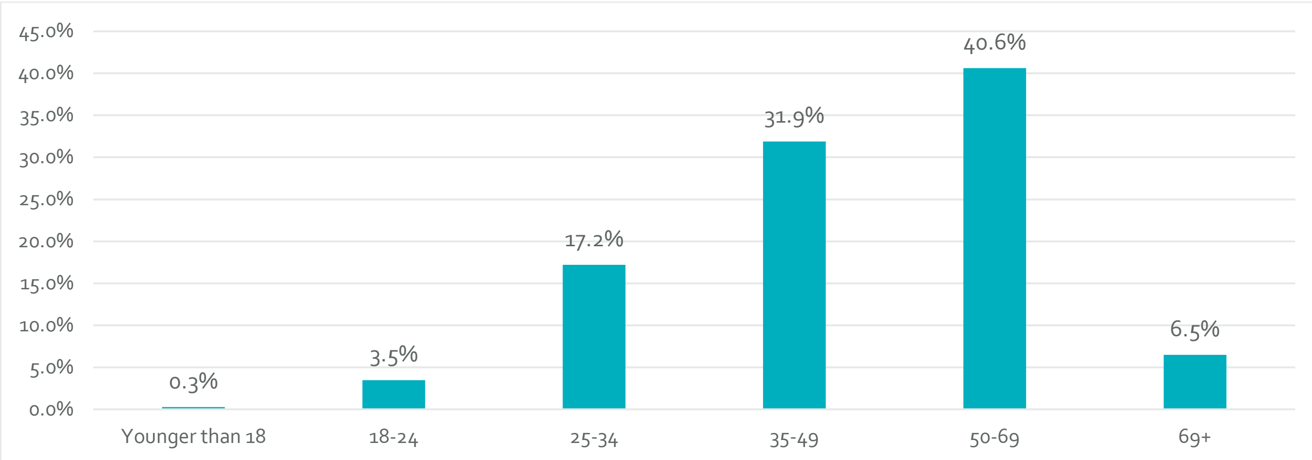
QUESTION 14: NEW FACILITIES ARE BEING CONTEMPLATED IN THE PROJECT. HOW LIKELY WOULD YOU BE TO DO THE FOLLOWING?

Respondents were asked to rate how likely they would be to participate in a selection of activities. Attend community meetings had the most responses; 22.6% of respondents selected "very likely" and 46.7% selected "somewhat likely". The use of a plaza for an event was next, 22.1% of respondents said they were "very likely" to participate, and 35.6% selected "somewhat likely". The activities with the most respondents that selected "not likely" were the use of an indoor rehearsal space, 66.8%, use of an outdoor stage, 55.4%, and host a catered reception, 51.7%.



RESPONDENT CHARACTERISTICS

AGE



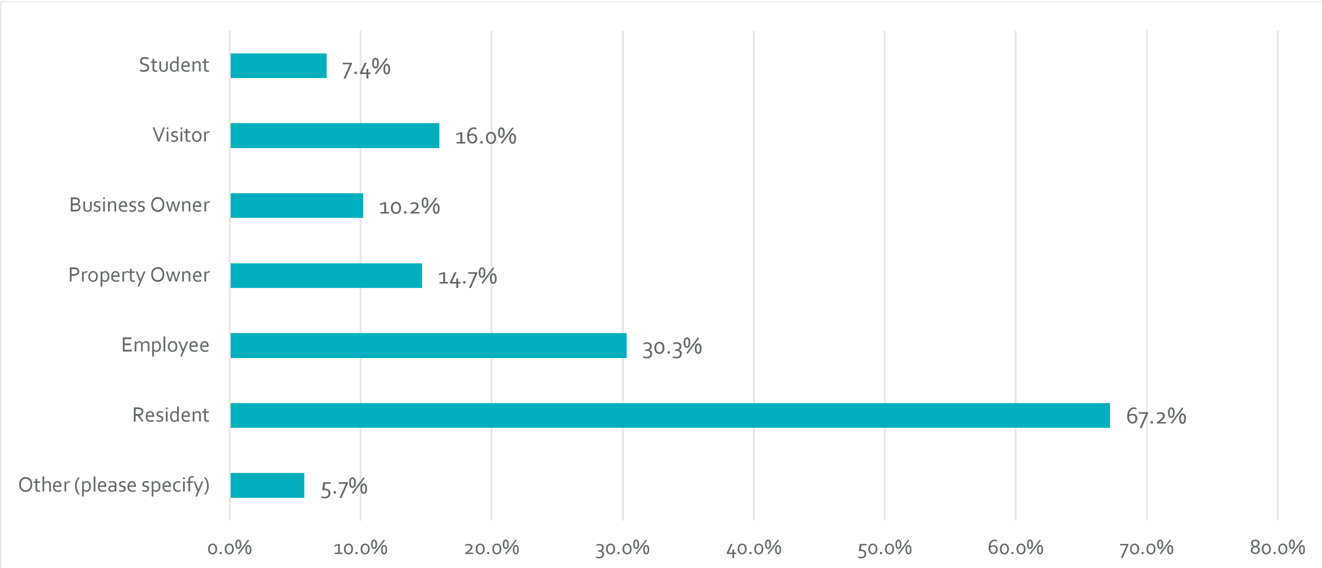
Respondents were prevalent between ages 35-60. About 20% pf respondents were under 35 years old.

GENDER

Of the 1,091 individuals who answered this question, 66% selected female, and 34% selected male.

INCOME

INTEREST(S) IN WAILUKU TOWN



Respondents represent a variety of interests and were allowed to select more than one response about their interest in Wailuku Town. Two-thirds indicate that they are a resident. Given that the resident population of Wailuku Town (the core area) is about 250, this group likely includes many residents who live in elsewhere in Wailuku and not just residents who live in the core.

CROSS-TABULATIONS

Survey results were cross-tabulated by age, gender, income and interest(s) in Wailuku in order to determine how much variation exists between various respondent groups. Overall, thre was a great deal of consistency in the priorities and preferences across various groups. Data presented in the following sections highlights differences that were found.

CROSS TABULATION BY AGE

The following bullet points highlight differing preferences and values based on survey respondents' age. The survey included six age groups: younger than 18*; 18 to 24; 25 to 34; 35 to 49; 50 to 69; and 69 or older.

- Respondents ages 18-to-24 were more likely than any other age group to select free Wi-Fi as the *one* thing they would use the most if it was included in the Wailuku Parking and Events Facility; 26% of respondents 18-to-24 selected free Wi-Fi, compared to just 7% of respondents overall.
- Out of all age groups, respondents ages 69+ were the most likely to say they would use an outdoor performance stage as part of the Wailuku Parking and Events Facility; 27% of respondents 69+ selected an outdoor stage as the one thing they would use the most, compared to 12% of respondents overall.
- Respondents ages 25-to-34 and 35-to-49 were much more likely than other age groups to say that they would use a children's museum/discovery center the most if it was part of the Wailuku Parking and Events

Facility. Approximately 25% of respondents ages 25-to-49 selected this option compared to less of 5% of respondents in other age groups.

- When asked what uses they would most like to see added to Wailuku Town, the greatest response among all age groups was casual restaurants, however respondents over 50-to-69 and 69+, tended to desire this amenity even more with 33% and 36% respectively selecting this as the one amenity they would most like to see, compared to 30% of respondents overall.
- Shopping was the second most popular choice among 18-to-24 year olds for the one thing they most wanted to see in Wailuku Town; 18% of respondents 18-to-24 selected this as their answer choice, compared to just 7% of respondents overall.
- The facility that the most respondents said they would be "very likely" to use was a splash pad or play area. This response was skewed heavily toward a younger audience with 28% of 18-to-24 year olds and 43% of 25-to-34 year olds saying they would be "very likely" to use this option. Less than 9% of respondents in other age groups selected this option.

CROSS TABULATION BY GENDER

Though male and female respondents generally replied with similar answers, there were some notable areas with diverging preferences and values.

- When asked what one amenity they would likely use, the top two amenities were the same for women and men -- food trucks or outdoor market; and plaza, park or green space. The third selection for women was a children's museum or discovery center while for men was outdoor performance stage.
- Women were twice as likely to select a children's museum or discovery center as the one amenity they would use most in the proposed Wailuku Parking & Events facility, as 19.3% of females selected this option compared to 7.7% of males.
- Males and females had the same top three performance types, in slightly different order, with males preferring live pop or acoustic music, 26.1%, followed by plays or musicals, 24.3%, and cultural programs, 14.1%. When asked the same question, 28.1% of females answered plays or musicals, while 15.3% answered live pop or acoustic music, and 14.9% prefer cultural programs.

PERFORMANCE TYPE	FEMALE	MALE
Plays or musicals	28.1%	24.3%
Cultural programs	14.9%	14.1%
Classical music	2.5%	5.3%
Children/school programs	12.2%	7.6%
Dance & hula	10.6%	6.5%
Live pop or acoustic music	15.3%	26.1%
Spoken word/poetry	1.3%	1.2%
Comedy	8.3%	7.0%
Lectures/educational programs	6.4%	7.9%
Open rehearsals	0.3%	0.0%

- Both male and female respondents answered similarly when asked how likely it is they would use amenities. The biggest difference was concerning the use of a splash pad or play area, where twice as many women (30%) answered they would 'very likely' use this amenity compared to men (14.1%).

CROSS TABULATION BY INCOME

The following bullet points highlight differing preferences and values based on annual household income. Annual income brackets in the survey included those earning: less than $50,000; between $50,000 and $99,999; between $100,000 and $149,000; and $150,000 or more.

- Respondents in all four income categories answered that the use they would most like to see added is casual restaurants. For income brackets below $100,000, the next most popular answer choice was a bookstore, while respondents in income brackets over $100,000 chose upscale restaurants.
- Close to 50% of all income groups are 'somewhat likely' to attend community meetings if included in the Wailuku Parking & Events Facility. The four income groups differed when asked what they would be 'very likely' to use; 27.8% of respondents with a household income less than $50,000 said they were 'very likely' to use a plaza for an event, compared to 22.1% of total respondents. 26.6% of respondents with a household income between $50,000 and $99,000 said they would 'very likely' utilize a splash pad or play area, compared to 24.8% of all respondents. Respondents with a household income of $100,000 to $149,000 and $150,000 or more answered they would 'very likely' attend community meetings if included in the proposed project.

CROSS TABULATION BY INTEREST(S) IN WAILUKU

The following data highlights respondents' differing preferences and priorities for the proposed Wailuku Parking & Events Facility based on each respondent's primary interest(s) in Wailuku. Interests listed in the survey included: resident, employee, property owner, business owner, visitor, and student.

- Business and property owners were much more likely to say they would attend community meetings if facilities were added to the Wailuku Parking and Events Facility. 36% of business owners and 32% of property owners said they were "very likely" to attend community meetings compared to just 22% of respondents overall.
- Employees were slightly more likely to select food store/market as the *one* thing they would most like to see added to Wailuku Town; 19% compared to 14% of respondents overall.
- Business owners and students were the most likely groups to say they would use a plaza for an event if it was part of the Wailuku Parking and Events Facility; 46% of business owners and 31% of students said they would be "very likely" to use a plaza compared to just 22% of respondents overall.
- Students were the most likely group to select free Wi-Fi as the *one* thing they would use the most if it was added to the Wailuku Parking and Events Facility; 15% of students selected this option compared to just 7% of respondents overall.
- Visitors and students were somewhat more likely than the other groups to select bookstore as the *one* thing they would most like to see added to Wailuku Town. 24% and 22% respectively selected this choice compared to 17% of respondents overall.

- Visitors were slightly more likely than other groups to select children's museum/discovery center as the *one* thing they would use the most if it was added to the Wailuku Parking and Events Facility; 21% of visitors selected this as their one choice compared to 15% of respondents overall.