

Socio-Economic Forecast

Basic Numbers

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State Land Use Districts

LĀNA'I LANDS, 2010

District Areas

Conservation	38,197 acres
Agricultural	46,639 acres
Rural	2,407 acres
Urban	3,257 acres

SOURCE: DBEDT, *2010 State of Hawaii Data Book*, Table 6.04
(<http://hawaii.gov/dbedt/info/economic/databook/db2010/>).

CLASS OF LĀNA'I LANDS IN TAX RECORDS, 2010

1 Improved Residential	316 acres
2 Apartment	73 acres
3 Commercial	127 acres
4 Industrial	72 acres
5 Agricultural	46,128 acres
6 Conservation	40,874 acres
7 Hotel/Resort	79 acres
8 Unimproved Residential	1,207 acres

NOTE: The tax records exclude some government lands, e.g., roadways, so the total acreage is smaller than shown in the preceding table.

SOURCE: Real Property Tax 2010 download, fullndarclass10.txt, from County of Maui Document Center.

Demographics

2010 DEMOGRAPHICS, ISLANDS OF MAUI COUNTY

	<u>Maui</u>	<u>Lāna`i</u>	<u>Moloka`i</u>
Resident Population	144,444	3,135	7,345
Wage and Salary Jobs	61,240	1,260	1,950
Visitor Units (Total)	19,325	352	392
Average Visitor Census	46,023	673	682

Important Ratios (2010)	% of Population		
age 0-19	25.0%	27.3%	29.2%
age 20- 64	62.4%	57.6%	54.5%
age 65 and up	12.6%	15.1%	16.3%
Unemployment Rate	8.1%	6.5%	12.8%
AVC/Resident Population	31.9%	21.5%	9.3%

Source: SE model (drawing on Census data and Hawai'i Tourism Authority visitor data).

PROJECTED POPULATION TO 2035

	Maui	Lānaʻi	Molokaʻi
2020 Forecast			
Resident Population	169,540	3,463	8,014
Wage and Salary Jobs	73,088	1,587	2,456
Unemployment Rate	6.6%	5.3%	10.4%
Visitor Units (Total)	19,326	352	392
Average Visitor Census	53,834	793	803
2035 Forecast			
Resident Population	206,884	4,020	9,304
Wage and Salary Jobs	82,740	1,935	2,765
Unemployment Rate	5.0%	4.0%	8.0%
Visitor Units (Total)	22,316	352	392
Average Visitor Census	61,934	912	924
Annual Rate of Change, 2010 to 2035			
Resident Population	1.45%	1.00%	0.95%
Wage and Salary Jobs	1.21%	1.73%	1.41%
Visitor Units (Total)	0.58%	0.00%	0.00%
Average Visitor Census	1.19%	1.22%	1.22%

PROJECTED DEMAND FOR SPACE

2020 2035 2020 2035

Change in

Resident Population 270 827 328 885

New resident housing demand 161 451 164 454

Non-resident demand NA NA 80 200

Demand for hotel/resort units □ □ □ □

Jobs counted as leading to COM space 151 355 137 341

Jobs counted as leading to IND space 13 63 54 104

New COM space demand (1,000 sq. ft.) 57 1 43

New IND space demand (1,000 sq. ft.) 54 1 05

2000 to 2010 to

NOTE: Demand for COM and IND space calculated using 2000 job counts and 2010 space. Density for new space

on Lānaʻi: 2.38 COM jobs per 1,000 square feet; 0.99 IND jobs per 1,000 square feet.

2.4 Supply of Urban Land

UNITS AND LANDS DESIGNATED FOR DEVELOPMENT

Use Units Area Sq. Ft. Internal area

Lānaʻi City

Vacant lots SFR 25

DHHL SFR 16

DHHL MFR 80

County SFR 201

County MFR 30

Kamāulupau SFR 30

Miki Basin IND 20 acres 435,600 [1]

Mānele SFR 265

MFR 115

COM 5.25 acres 171,518 [2]

Kōʻeʻe SFR 517

MFR 129

NOTES: Tables 6 and 7 did not treat Project District lands as a separate category, but included undeveloped PD lands in the "Urban, no Dwelling or Commercial" category.

[1] Assumes FAR = 0.5 (can be higher in Industrial areas).

[2] FAR of 0.75 according to Project District ordinance.

Housing Supply and Demand

- ▶ **Resident Housing:** Table 9 indicates demand for some 454 units by 2035. The LānaʻI City area includes spaces planned for some 383 additional housing units – a deficit of 71 units.
- ▶ **Non-Resident Housing:** The Project Districts could include 1,026 more units than had been built out as of 2010. Anticipated demand for these units by 2035 amounts to 200 units (based on historical rates of absorption).

Com/Ind Supply and Demand

- ▶ **Commercial Space:** The jobs associated with new demand for Commercial space could yield need for an **additional 143,000 square feet** of space. Current plans allow for construction of up to 171,518 square feet of space in Mānele. While the total amount of space available for development exceeds projected demand, it is located in a single Project District. Much of the demand for space for services and self-employed jobs might be better located in town, in more central and presumably less expensive space.
- ▶ **Industrial Space:** The additional space to be developed in Miki Basin will exceed likely demand by 2035.