

Second Quarter 2013

Welcome to *Research and Data Highlights* from the DBEDT's Research and Economic Analysis Division (READ).

"Highlights" is a quarterly summary of research and data projects of the Division, which may be of interest to particular segments of the community. These projects range from overall economic forecasts to very specific and detailed industry studies.

It is also a way for READ to introduce data and information users to the rich array of materials on its website that may provide just the answer to a user's question.

About READ:

READ provides economic forecasts and analyses of the economy that are basic to effective, long-term statewide planning. We also collect, compile, interpret and present data and statistics on all aspects of business activity, the economy and provide demographic characteristics of Hawaii. For casual users, READ offers basic products such as the [Hawaii Facts & Figures](#) brochure. Researchers with more detailed needs may consult the comprehensive [Hawaii State Data Book](#) and our extensive on-line [Hawaii Census Data](#) section.

We invite you to explore our comprehensive research archives at: <http://dbedt.hawaii.gov/economic/>.

What's New at READ:

Mapping Tools from the 2010 Census

New mapping tools are being developed based on the 2010 census and the latest American Community Survey. The below, for example, is a web map showing Urbanized Areas (in blue) and Urban Clusters (in red) based on the 2010 Census data from the U.S. Census Bureau. The map also incorporates zip code boundaries.

<http://histategis.maps.arcgis.com/apps/OnePane/basicviewer/index.html?appid=5baf4f5e08d942009656e168bf2548d9>

http://dbedt.hawaii.gov/economic/data_reports/qser/

QSER – READ's Quarterly Statistical and Economic Report

Each quarter - in February, May, August and November - READ produces the QSER, its core report on the economy. Major economic sectors are reviewed and boiled down to a summary of the economic situation and outlook in the initial pages of the report.

In its latest economic report, DBEDT is projecting continued positive economic growth.

ACTUAL AND FORECAST KEY ECONOMIC INDICATORS FOR HAWAII: 2011 TO 2016

Economic Indicators	2011	2012	2013	2014	2015	2016
	(Actual)		(Forecast)			
Total population (thousands)	1,378	1,392	1,407	1,421	1,436	1,451
Visitor arrivals (thousands) 1/	7,299	7,999	8,344	8,554	8,735	8,901
Visitor days (thousands) 1/	68,495	74,638	76,957	79,075	80,745	82,282
Visitor expenditures (million dollars) 1/	12,255	14,523	15,341	16,070	16,800	17,521
Honolulu CPI-U (1982-84=100)	243.6	249.5	255.2	260.8	266.6	272.4
Personal Income (million dollars)	59,014	61,295	64,359	67,706	71,024	74,504
Real personal income (millions of 2005) 2/	42,706	43,316	44,459	45,764	46,973	48,214
Non-agricultural wage & salary jobs (thousands)	594.0	605.3	617.4	628.7	639.4	648.9
Civilian unemployment rate	6.5	5.8	4.8	4.5	4.3	4.1
Gross domestic product (million dollars) 3/	66,991	70,318	73,659	76,970	80,433	84,045
Real gross domestic product (millions of 2005) 3/	57,977	59,081	60,499	61,891	63,314	64,765
Gross domestic product deflator (2005=100) 3/	115.5	119.0	121.8	124.4	127.0	129.8
Annual Percentage Change						
Total population	1.0	1.0	1.0	1.0	1.0	1.0
Visitor arrivals	4.0	9.6	4.3	2.5	2.1	1.9
Visitor days	4.6	9.0	3.1	2.8	2.1	1.9
Visitor expenditures	10.7	16.5	5.6	4.8	4.5	4.3
Honolulu CPI-U	3.7	2.4	2.3	2.2	2.2	2.2
Personal Income	5.7	3.9	5.0	5.2	4.9	4.9
Real personal income	1.9	1.4	2.6	2.9	2.6	2.6
Non-agricultural wage & salary jobs	1.2	1.9	2.0	1.8	1.7	1.5
Civilian unemployment rate 4/	-0.3	-0.7	-1.0	-0.3	-0.2	-0.3
Gross domestic product	2.1	5.0	4.8	4.5	4.5	4.5
Real gross domestic product	-0.2	1.9	2.4	2.3	2.3	2.3
Gross domestic product deflator (2005=100)	2.3	3.0	2.3	2.1	2.2	2.2

1 Visitors who came to Hawaii by air or by cruise ship.

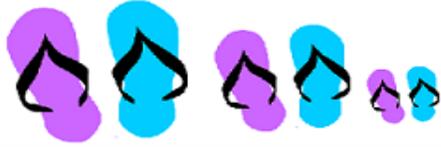
2 DBEDT calculated using BEA estimate of nominal personal income deflated by U.S. Bureau of Labor Statistics Honolulu CPI-U.

3 The 2012 value is estimated by DBEDT.

4 Absolute change from previous year.

Source: Hawaii State Department of Business, Economic Development & Tourism, May 7, 2013.

<http://dbedt.hawaii.gov/census/>



*Census 2010:
Your 'Ohana Has Been Counted!*

Census 2010: Latest Hawaii Data

The U.S. Census Bureau released its 2007-2011 ACS 5-year estimates based on the annual American Community Survey conducted by the Census Bureau. The Census Bureau recommends using this data for social, economic, and detailed housing characteristics.

Some highlights for Hawaii from the 2007-2011 ACS survey 5-year detail include:

All 37 census tracts that had median household incomes of \$100,000 or more were located on Oahu.

Waialae-Iki (census tract 4.02) had the highest household income of \$160,417 over the 5-year period.

Of the 36 census tracts with a population poverty rate of over 20 percent, 22 were located on Oahu, 10 were on the Big Island, 2 were on Molokai, and 2 were on Maui. Mayor Wright Housing (census tract 54) on Oahu had the highest population poverty rate at 65.4% over the 5-year period.

Of the 51 census tracts with civilian unemployment rates of 10% or above, Kolekole Avenue (census tract 95.01) on Oahu ranked the highest with 34.7%, followed by Civic Center (census tract 39 on Oahu) with 28.4% of the labor force unemployed during the 5-year period.

All 11 census tracts where 100% of their population 25 years and over had a high school degree or higher were located on Oahu.

The top 35 census tracts with 50% or more of their population 25 years or over holding a bachelor's degree or higher were also all located on Oahu.

14 census tracts in Hawaii had owner occupied homes averaging over a million dollars value during the 5 year period. Many of these areas were in East Oahu - Portlock, Waialae Iki, Waialae-Kahala, and Diamond Head. The neighbor island tracts were Wailea (census tract 303.03 on the island of Maui), Honokowai (census tract 315.03 on the island of Maui) and Ha'ena-Hanalei (census tract 401.04 on the island of Kauai).

<http://dbedt.hawaii.gov/census/>



*Census 2010:
Your 'Ohana Has Been Counted!*

Commuter-Adjusted Population Estimates from the American Community Survey 2006-2010

Knowing how a community's population changes during the day is crucial to emergency preparedness officials and other local planners. This report and series of tables show the population totals for places, minor civil divisions, counties and states, accounting for the flow of commuters on a typical workday (<http://www.census.gov/hhes/commuting/data/daytimepop.html>). In addition, graphs are available that show cities among the top 20 with the largest commuter-adjusted populations and cities among the top 20 with the greatest percentage change between residence population and commuter-adjusted population. The report also provides maps and ratios of workers to residents for counties and cities.

Place name	Total resident population		Total workers working in place		Total workers living in place		Estimated daytime population		Daytime population change due to commuting		Percent daytime population change due to commuting		Workers who lived and worked in the same place		Percent workers who lived and worked in the same place		Employment residence ratio	
	Estimate	MCE	Estimate	MCE	Estimate	MCE	Estimate	MCE	Estimate	MCE	Estimate	MCE	Estimate	MCE	Estimate	MCE	Estimate	MCE
Ahiwenu CDP	3,760	694	621	190	6,464	469	4,927	476	-4,033	419	-49.6	2.9	406	169	7.4	2.9	0.11	0.03
Aiea CDP	8,417	462	2,966	372	4,096	364	7,287	439	-1,130	600	-13.4	6.6	369	122	8.8	3.0	0.72	0.11
East Honolulu CDP	48,016	1,047	7,607	669	26,636	801	30,988	1,106	-18,028	973	-36.8	1.8	3,664	319	14.3	1.2	0.30	0.02
Ewa Beach CDP	15,294	1,357	2,448	341	6,772	765	10,970	937	-4,324	795	-28.3	3.7	470	163	6.9	2.5	0.36	0.06
Ewa Center CDP	21,476	911	1,310	282	10,960	548	11,826	788	-9,650	610	-44.9	2.5	346	144	3.2	1.3	0.12	0.03
Ewa Villages CDP	6,477	1,034	629	186	3,089	610	3,917	714	-2,660	629	-39.6	6.3	86	84	2.8	2.8	0.17	0.06
Hickam Housing CDP	7,011	896	9,871	814	3,143	621	13,739	1,016	6,728	689	96.0	16.6	2,175	477	69.2	6.6	3.14	0.43
Hilo CDP	48,796	1,866	28,448	1,106	21,407	1,043	66,836	1,754	7,041	999	14.4	2.3	17,612	983	81.8	2.0	0.33	0.06
Kalihi CDP	24,712	1,606	17,388	969	10,607	768	31,693	1,378	6,881	1,110	27.8	6.6	4,663	687	44.3	4.3	0.66	0.14
Kalihi CDP	13,069	1,002	18,604	986	6,487	662	26,196	1,194	13,137	966	100.6	12.4	4,982	806	77.0	4.2	3.03	0.30
Kalihi CDP	38,641	981	12,617	811	19,366	662	31,793	1,126	-6,748	946	-17.6	2.4	5,676	434	29.3	1.9	0.66	0.04
Kanaha CDP	34,401	1,278	10,437	706	17,469	846	27,369	1,126	-7,032	906	-20.4	2.3	3,143	369	18.0	1.8	0.60	0.04
Kanaha Station CDP	16,191	1,894	7,306	1,366	6,664	1,800	10,833	1,461	642	806	6.3	8.9	4,044	1,382	60.7	7.2	0.10	0.14
Kapolei CDP	12,043	498	4,423	379	6,206	446	10,260	610	-1,783	636	-14.8	4.3	482	160	7.3	2.5	0.71	0.07
Kihei CDP	19,866	1,216	6,986	714	10,948	847	16,882	1,101	-3,963	914	-20.0	4.2	3,784	628	34.6	6.1	0.64	0.07
Maiala CDP	17,116	1,028	928	270	8,966	636	9,088	752	-8,028	608	-46.9	2.6	628	219	6.9	2.2	0.10	0.03
Maunaloa CDP	6,906	797	1,609	266	3,408	403	6,006	620	-1,889	462	-27.6	6.2	872	220	26.6	6.0	0.44	0.09
Millers Market CDP	28,798	806	1,888	330	11,170	483	11,436	807	-9,362	607	-46.0	2.8	541	171	4.8	1.6	0.16	0.03
Millers Town CDP	28,542	724	5,201	582	16,678	617	19,066	800	-10,477	768	-36.5	2.4	2,140	276	13.6	1.7	0.33	0.04
Manali CDP	12,664	766	1,106	222	4,681	473	9,078	682	-3,676	638	-28.3	3.4	333	116	7.1	2.7	0.24	0.06
Pearl City CDP	44,602	1,373	10,819	663	22,102	776	33,219	1,226	-11,283	977	-25.4	1.9	2,460	331	11.1	1.2	0.49	0.03
Waimanalo CDP	6,681	1,368	1,473	472	2,642	631	6,412	1,278	-1,169	346	-17.8	6.4	668	444	24.9	13.0	0.66	0.12
Waipahu CDP	48,221	1,928	9,361	689	17,868	1,048	31,724	1,682	-8,497	1,261	-21.1	2.7	2,182	366	12.2	1.9	0.52	0.06
Waipio CDP	12,683	713	3,639	417	6,981	489	9,141	663	-3,442	629	-27.4	4.4	416	168	6.9	2.3	0.61	0.07
Waipio Acres CDP	6,686	688	97	66	2,782	341	2,991	377	-2,696	338	-47.4	3.6	68	40	2.1	1.2	0.03	0.02
West Loch Estate CDP	6,601	786	181	96	3,160	633	2,632	411	-2,969	631	-64.0	4.7	107	82	3.4	2.6	0.06	0.03

For the full DBEDT census site, visit: <http://dbedt.hawaii.gov/census/>

http://hawaii.gov/dbedt/info/economic/data_reports/energy-trends/



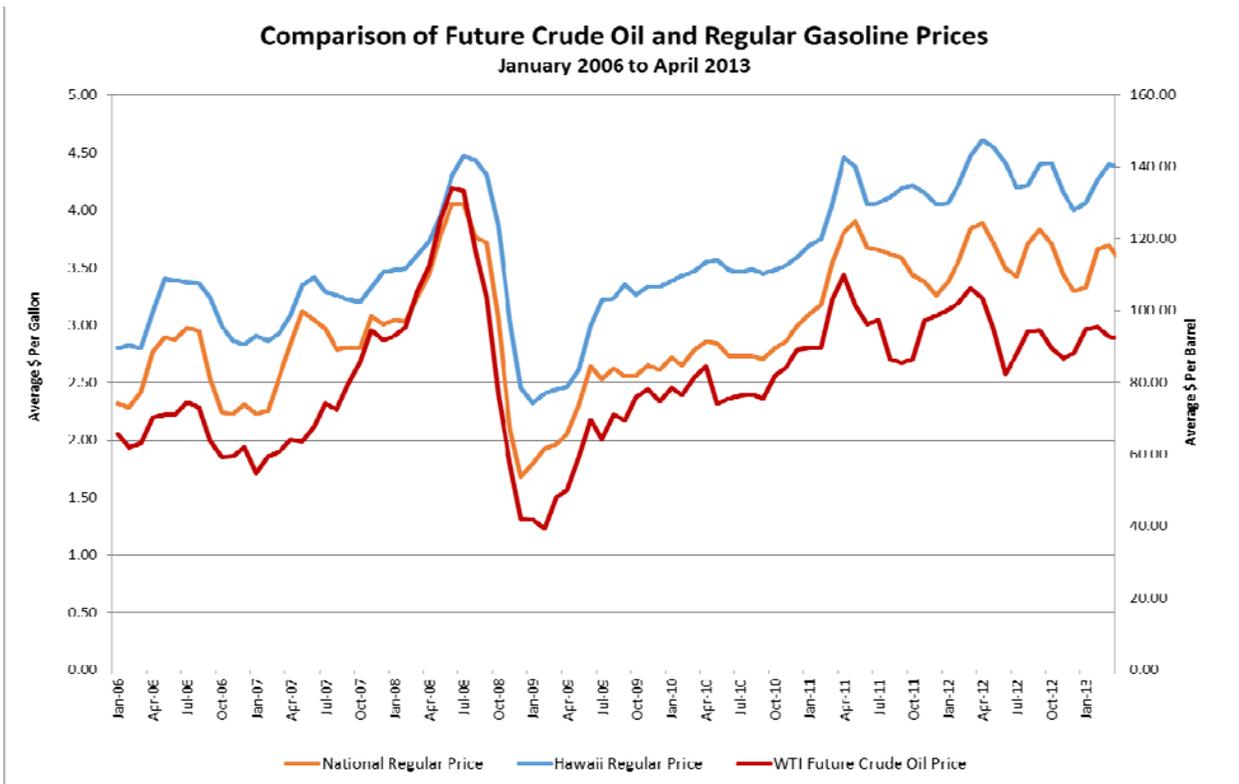
Monthly Energy Trend Data

Each month, READ compiles Hawaii energy data that is publically available through either private or federal data bases. Other proprietary energy data is collected and archived through the Hawaii State Energy Office.

For example, in April 2013, Hawaii's price for regular gasoline decreased only 4.9 percent, although the price of crude oil decreased 10.9 percent.

In April 2013, Hawaii's price for regular gasoline averaged \$4.379 per gallon, which was \$0.826 per gallon or 23.3 percent higher than the national average for the same month.

Monthly Energy Data Reports can be found on the READ website at: http://hawaii.gov/dbedt/info/economic/data_reports/info/economic/data_reports/energy-trends.



<http://hawaii.gov/dbedt/info/economic/databook/db2001/db2001.pdf/>

The State of Hawaii Data Book 2011

This official summary of statistics on the social, economic, and political organization of our state is continually updated online. Website tables reflect the latest information available.

The latest edition of the *State of Hawai'i Data Book* is now available at <http://hawaii.gov/dbedt/info/economic/databook/db2001/db2001.pdf/>

The state's Data Book is the most comprehensive statistical book about Hawai'i in a single compilation. With more than 800 data tables, it covers a broad range of statistical information in areas such as population, education, labor, energy, business enterprises, government, tourism and transportation.

DBEDT's Research and Economic Analysis Division (READ) also maintains the historical series of tables and updates the data continuously throughout the year.

These editions, closely follows the organization and format of its counterpart, the *Statistical Abstract of the United States*, to facilitate comparison of state and national data. It places the major emphasis on statewide data and less so on counties, islands, urban places, and smaller areas.

The Data Book is may be downloaded in whole or in part as PDF or Excel files.

Table 1.06-- RESIDENT POPULATION, BY COUNTY: 2000 TO 2012

[Based on place of usual residence, regardless of physical location on the estimate or census date. Includes military personnel stationed or homeported in Hawaii and residents temporarily absent; excludes visitors present]

Date	State total	City and County of Honolulu	Hawaii County	Kauai County	Maui County 1/
2000: April 1 2/	1,211,537	876,156	148,677	58,463	128,241
July 1 3/	1,213,519	876,629	149,244	58,568	129,078
2001: July 1 3/	1,225,948	882,755	151,690	59,075	132,428
2002: July 1 3/	1,239,613	890,473	154,576	59,981	134,583
2003: July 1 3/	1,251,154	894,311	158,442	60,805	137,596
2004: July 1 3/	1,273,569	907,997	162,852	62,095	140,625
2005: July 1 3/	1,292,729	918,181	168,237	62,863	143,448
2006: July 1 3/	1,309,731	926,954	173,536	63,465	145,776
2007: July 1 3/	1,315,675	925,335	177,733	64,490	148,117
2008: July 1 3/	1,332,213	933,680	181,506	65,603	151,424
2009: July 1 3/	1,346,717	943,177	183,629	66,518	153,393
2010: April 1 2/	1,360,301	953,207	185,079	67,091	154,924
July 1 3/	1,364,274	956,481	185,438	67,229	155,126
2011: July 1 3/	1,378,129	966,363	187,229	67,781	156,756
2012: July 1 3/	1,392,313	976,372	189,191	68,434	158,316

1/ Including Kalawao County (Kalaupapa Settlement). Kalawao had 147 in 2000, 90 in 2010 and 90 in 2012.

2/ Decennial census figure.

3/ Population estimates for 2000 through 2009 were revised based upon the April 1, 2010 figures which were released September 28, 2011. Population estimates after April 1, 2010 were based on revisions released in April 2012 and may differ somewhat from earlier figures cited in other tables.

Source: U.S. Bureau of the Census, Federal-State Cooperative Program for Population Estimates, "Table 1. Intercensal Estimates of the Resident Population for Counties of Hawaii: April 1, 2000 to July 1, 2010" (CO-EST00INT-01-15) <<http://www.census.gov/popest/data/intercensal/county/tables/CO-EST00INT-01/CO-EST00INT-01-15.xls>> accessed September 28, 2011 and "Annual Population Estimates, Estimated Components of Resident Population Change, and Rates of the Components of Resident Population Change for States and Counties: April 1, 2010 to July 1, 2012" (CO-EST2012-alldata) (released March 14, 2013) <<http://www.census.gov/popest/data/datasets.html>> accessed March 14, 2013.

To see the entire **Hawaii Data Book**, go to: <http://hawaii.gov/dbedt/info/economic/databook/db2011/db2011.pdf>

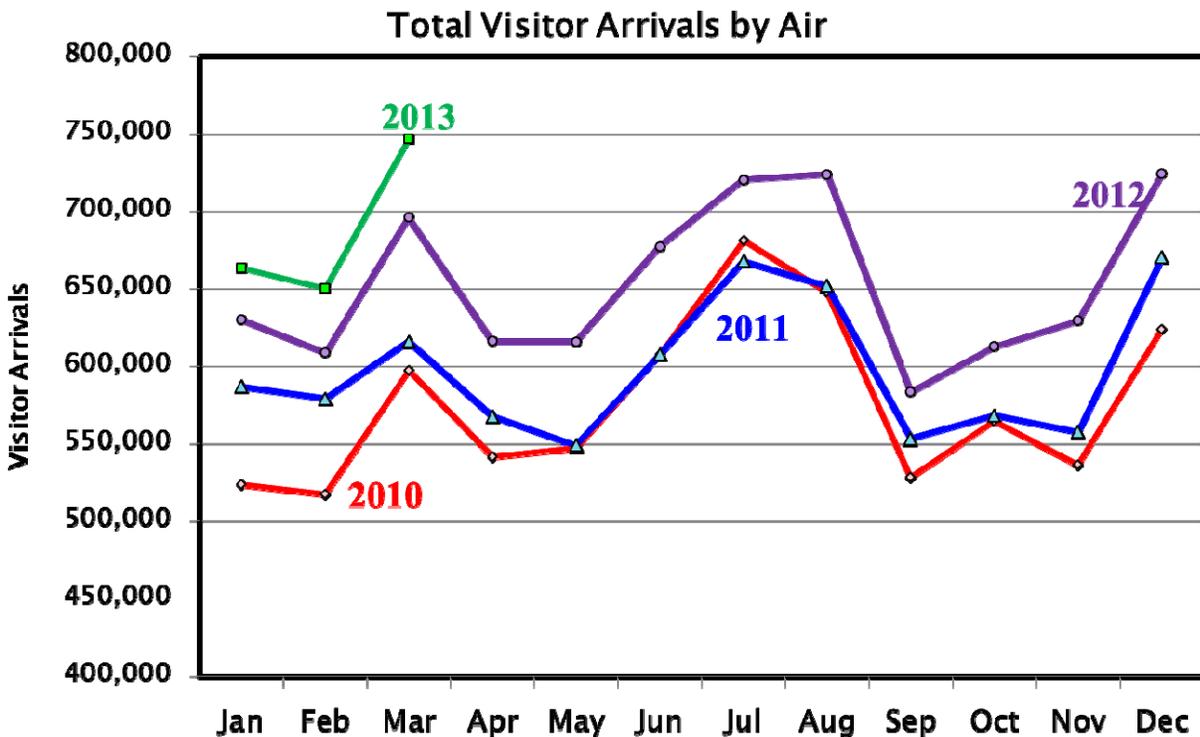
<http://hawaii.gov/dbedt/info/visitor-stats/tourism/>

Tourism Sector Continues to Improve

After very strong growth in 2012, Hawaii's tourism sector continued the positive growth in the first quarter of 2013. Both domestic and international visitor arrivals, especially international visitor arrivals increased in the quarter compared with the same quarter in 2012. Due to shorter lengths of stay, the increase in daily visitor census was lower than the increase in visitor arrivals. However, since visitors spent more on a daily basis during the first quarter of 2013, total visitor spending increased more than the increase in visitor arrivals in the quarter.

Nominal visitor expenditures by air totaled \$3.913.5 billion in the first quarter of 2013, up 7.5 percent or \$271.7 million from the same quarter of 2012 (Table D-11). In 2012, visitor expenditures increased \$2.243.8 billion or 18.6 percent compared with the previous year.

Readers interested in visitor statistics on a monthly basis can find them on the DBEDT website at: <http://dbedt.hawaii.gov/visitor/>. Those interested in daily passenger arrival data may access those at: http://dbedt.hawaii.gov/economic/data_reports/special/

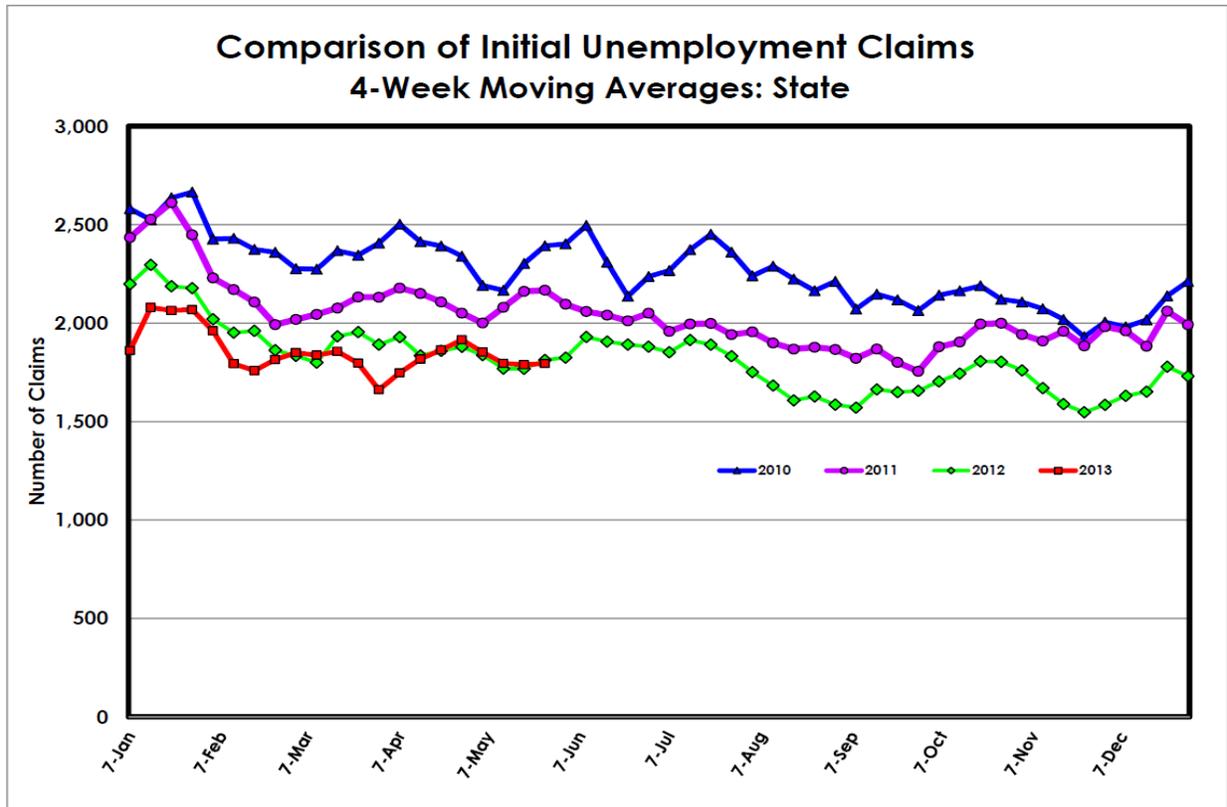


Through March 2013

Weekly Unemployment Data

Every Thursday, READ issues a Special Unemployment Update for the previous week on both a statewide and county-by-county basis.

The Division also presents graphics of 4-year comparisons, as well as a state trend since the year 2000. To see the report, go to: <http://dbedt.hawaii.gov/economic/unemployment/>.



This publication is produced by the Research and Economic Analysis Division (READ) of the Department of Business, Economic Development & Tourism (DBEDT), State of Hawaii which is responsible for its content and presentation.

For more information on READ, go to: <http://hawaii.gov/dbedt/info/economic>

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