

Third 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:

Browse the "New" Economic Website

Our new website is based on the latest statewide template and features more visible and more accessible data and statistics.

Main Research and Economic Analysis page: <http://dbedt.hawaii.gov/economic/>
Census Data and tools: <http://dbedt.hawaii.gov/census/>
Current Economic Conditions: http://dbedt.hawaii.gov/economic/current_economic_conditions/

<http://dbedt.hawaii.gov/economic/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 in Hawaii throughout 2013.

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	8,029	8,370	8,618	8,798	8,971
Visitor days (thousands) 1/	68,467	74,519	76,566	78,948	80,620	82,207
Visitor expenditures (million dollars) 1/	12,158	14,365	15,130	15,885	16,652	17,424
Honolulu CPI-U (1982-84=100)	243.6	249.5	254.2	259.8	266.3	274.3
Personal income (million dollars)	59,014	61,339	64,100	67,433	71,007	74,912
Real personal income (millions of 2000\$) 2/	42,706	43,348	44,454	45,758	47,008	48,149
Non-agricultural wage & salary jobs (thousands)	594.0	605.3	616.2	627.3	638.0	647.5
Civilian unemployment rate	6.5	5.8	4.8	4.5	4.3	4.1
Gross domestic product (million dollars)	70,006	72,424	75,611	79,010	82,565	86,280
Real gross domestic product (millions of 2005\$)	60,899	61,877	63,457	65,010	66,538	68,068
Gross domestic product deflator (2005=100)	115.0	117.0	119.2	121.5	124.1	127
Annual Percentage Change						
Total population	1.0	1.0	1.0	1.0	1.0	1.0
Visitor arrivals	4.0	10.0	4.3	3.0	2.1	2.0
Visitor days	4.6	8.8	2.7	3.1	2.1	2.0
Visitor expenditures	9.9	18.1	5.3	5.0	4.8	4.6
Honolulu CPI-U	3.7	2.4	1.9	2.2	2.5	3.0
Personal income	5.7	3.9	4.5	5.2	5.3	5.5
Real personal income	1.9	1.5	2.6	2.9	2.7	2.4
Non-agricultural wage & salary jobs	1.2	1.9	1.8	1.8	1.7	1.5
Civilian unemployment rate 3/	-0.3	-0.7	-1.0	-0.3	-0.2	-0.3
Gross domestic product	4.1	3.5	4.4	4.5	4.5	4.5
Real gross domestic product	2.1	1.6	2.6	2.4	2.4	2.3
Gross domestic product deflator (2005=100)	2.0	1.8	1.8	2.0	2.1	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/ Absolute change from previous year.

Source: Hawaii State Department of Business, Economic Development & Tourism, August 15, 2013.

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



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

Census 2010: Latest Hawaii Data

Hawaii Population Characteristics 2012

The U.S. Census Bureau released the 2012 National, State and County population characteristics on June 13, 2013. The following are a few facts about Hawaii.

On July 1, 2012, Asians (alone or in combination) accounted for 56.9% of the state total population (ranked #1 in the nation in terms of shares of Asians in total population; ranked second was California at 15.8%). On July 1, 2012, Honolulu County had the largest percentage of Asian (alone or in combination with other races) population at 60.9%, followed by Kauai County at 51.4%, Maui County at 47.7%, and Hawaii County at 45.7%.

On July 1, 2012, Native Hawaiians and Other Pacific Islanders (alone or in combination) accounted for 26.2% of Hawaii's total population (ranked #1 in the country in terms of shares of this race group in the total population). Hawaii County had the largest share of Native Hawaiians and Other Pacific Islanders at 34.3%, followed by Maui County at 27.5%, Kauai County at 25.8%, and Honolulu County at 24.4%.

On July 1, 2012, White (alone or in combination) accounted for 43.0% of the state total population (ranked on the bottom in terms of shares of this race group in the total population with Washington D.C. ranked second lowest having 44.8% of its population in this category). Within the state, Hawaii County ranked the first in terms of shares of White population. 56.2% of the total population on the Island of Hawaii was White alone or in combination with other races on July 1, 2012. Maui County had 52.3% of White population and ranked the second, followed by Kauai County at 51.3%, and then Honolulu County at 38.3%.

On July 1, 2012, Hawaii had 48,532 people with a Black or African American (alone or in combination) racial background. There were also 36,408 people who were American Indian and Alaska Native (alone or in combination) in Hawaii on July 1, 2012.

On July 1, 2012, the population 65 year and above accounted for 15.1% (ranked 9th in the nation), while persons 85 years of age and above shared 2.5% of the total population (5th place in the nation).

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



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

Hawaii Population Characteristics 2012 (continued)

Minority population comprised 77.2% of our state's population. "Minority" is defined by the U.S. Census Bureau as the population identifying their race and ethnicity as something other than non-Hispanic White race alone. By county, Honolulu County was the highest with an 80.6% minority population. Next was Kauai County with a 69.9% minority population, followed by Hawaii County with 69.3% and Maui County with 68.4%.

Hawaii's population 65 years and above increased by 4.1% from July 1, 2011 to July 1, 2012 while our total population increased 1.0% a year during the same period.

On July 1, 2012, Kauai County had the highest percentage of 65 year + population at 16.1% followed by Hawaii County with 15.9%. 15.1% of the population in Honolulu County was 65 years or above in July 2012 while Maui County had the smallest share of 65 year + population at 14.0%

Population in Honolulu County was relatively younger with median age of 37.3 years in July 2012, followed by Maui County at 40.2 years, and Hawaii County at 41.3 years. Median age for population on Kauai was 41.8 years in July 2012. Statewide median age in July 2012 was 38.3 years, which was lower than last year's median age of 38.5 years.

On July 1, 2012, Hawaii's total population consisted of 50.4% males and 49.6% females.

Mixed race population in Hawaii was 23.0% on July 1, 2012, while the percentage of mixed race population in the nation on the same day was only 2.4%. School age population (5-17 years) decreased by 1,399 between the 2011 to 2012 period.

The population and its characteristics are estimates by the U.S. Census Bureau based on the 2010 Census population, vital statistics, administrative records, Federal tax return, and the results from the American Community Survey. These estimates tend to change when more information become available.

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

<http://dbedt.hawaii.gov/economic/energy-trends-2/>



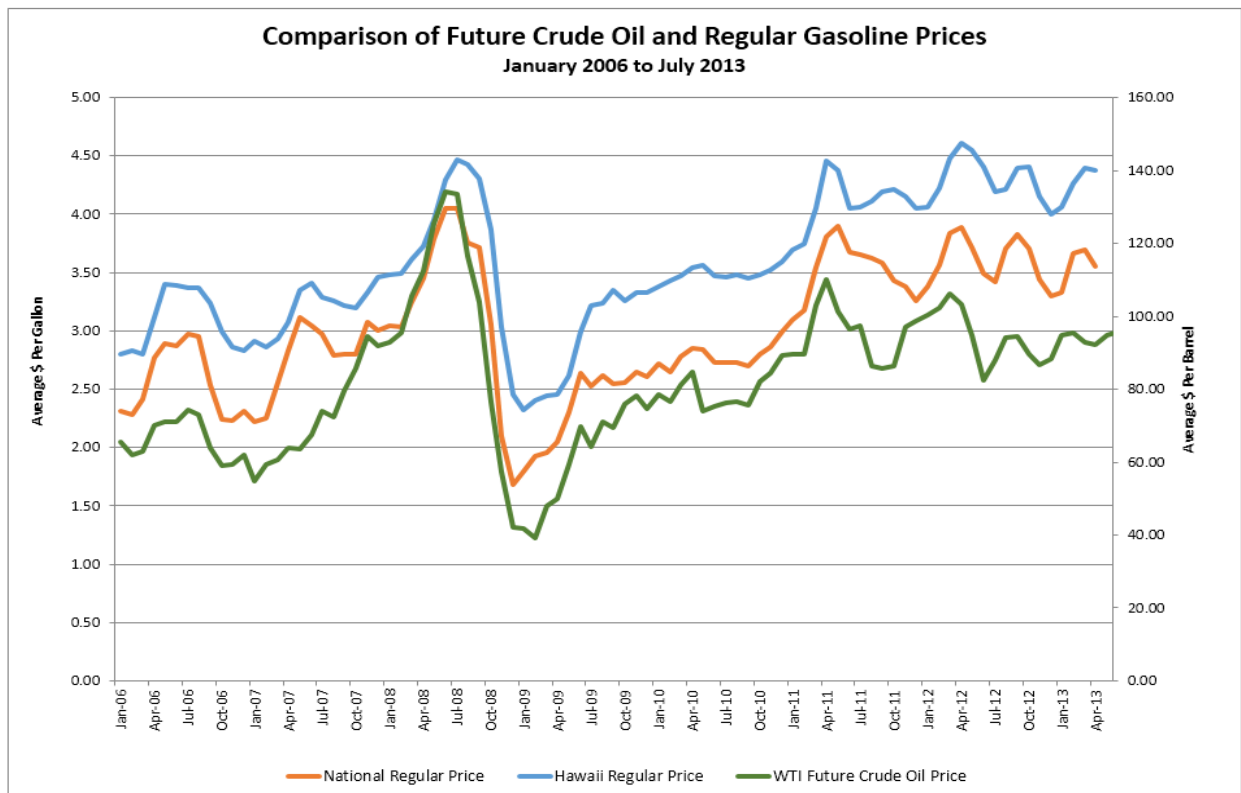
Monthly Energy Trend Data

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.

In July 2013, Hawaii's price for regular gasoline averaged \$4.339 per gallon, which was \$0.753 per gallon or 21.0% higher than the national average for the same month.

Also as of July 2013, there were 1,077,697 registered taxable gasoline passenger vehicles in the state - a 7.6% increase from the same period last year and an increase of 6,420 or 0.6% from June 2013.

Monthly Energy Data Reports can be found on the READ website at: <http://dbedt.hawaii.gov/economic/energy-trends-2/>



<http://dbedt.hawaii.gov/economic/databook/db2012/>

The State of Hawaii Data Book 2012

This official summary of statistics on the social, economic, and political The latest edition of the *State of Hawai'i Data Book* is now available at <http://dbedt.hawaii.gov/economic/databook/db2012/>.

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 place 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://dbedt.hawaii.gov/economic/databook/db2012/>.

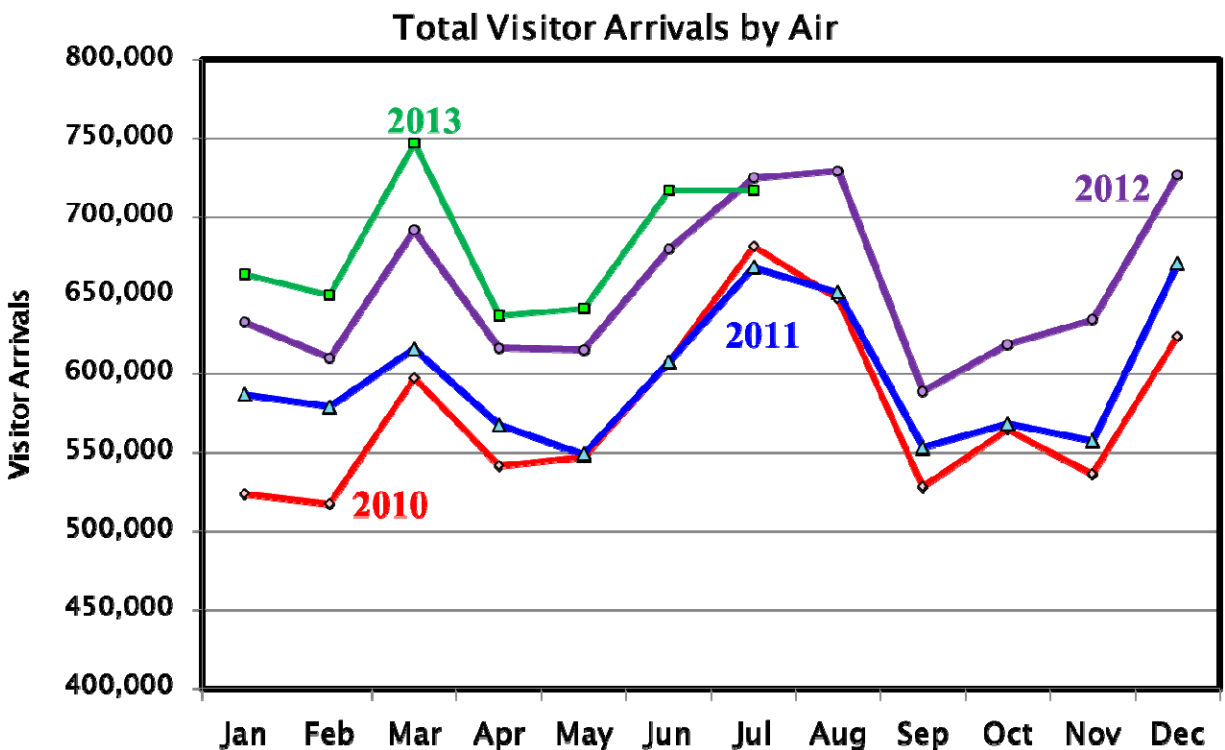
<http://dbedt.hawaii.gov/visitor/tourism-forecast/>

Tourism Sector Continues to Improve

After a very strong growth in 2012, Hawaii's tourism sector continued the positive growth in the second quarter of 2013. Both domestic and, 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 second quarter of 2013, total visitor spending increased more than the increase in daily visitor census in the quarter. For the economy, visitor spending is more important than visitor arrivals.

Nominal visitor expenditures by air totaled \$3,448.9 million in the second quarter of 2013, up 4.5 percent or \$147.0 million from the same quarter of 2012. For the first half of 2013, visitor expenditures increased \$479.2 million or 7.0 percent compared with the same period last year.

Readers interested in visitor statistics on a monthly basis can find them on the DBEDT website at: <http://dbedt.hawaii.gov/visitor/tourism-forecast/>



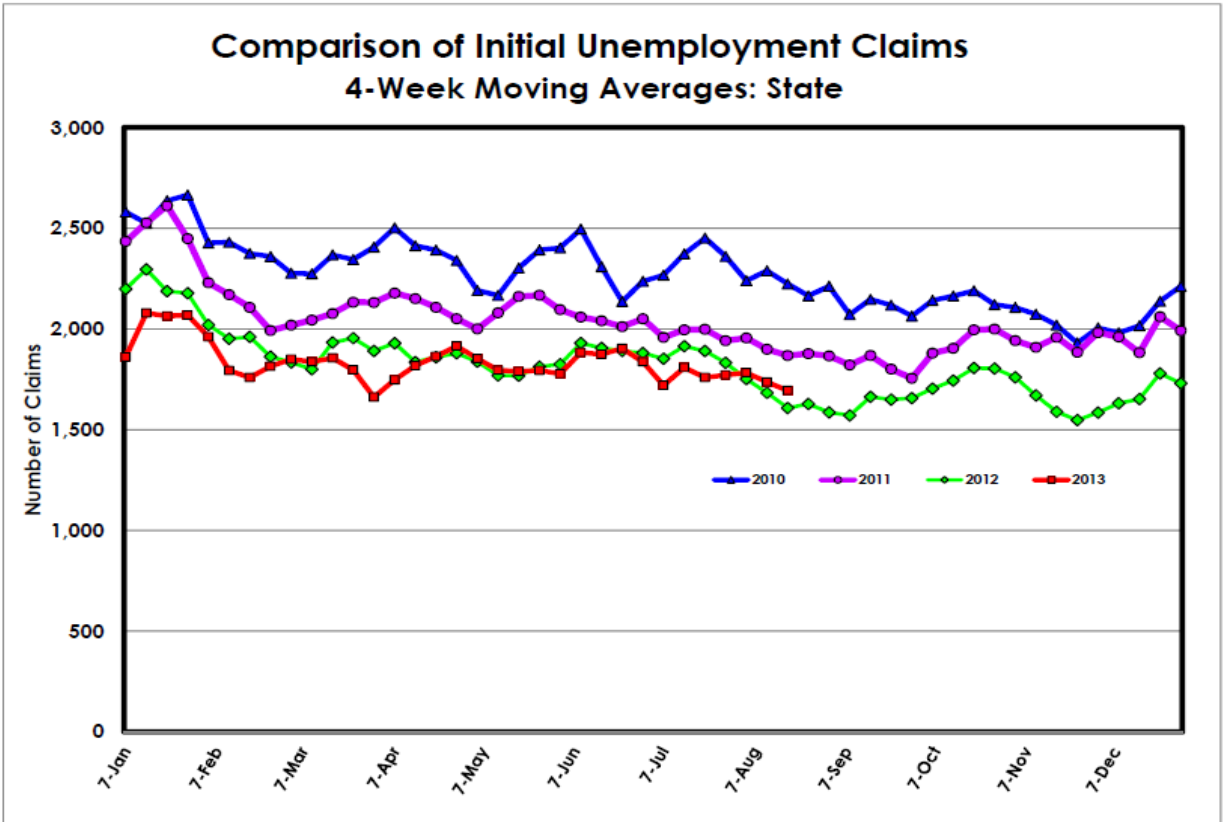
Through July 2013

<http://dbedt.hawaii.gov/economic/unemployment/>

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://dbedt.hawaii.gov/economic>

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