

Fourth 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:

State of Hawaii Electric Power Industry Current Status and Trends

Based on the most recent data available, this report provides basic information to help readers understand the current status and recent changes in Hawaii's electric power industry.

Find it at: http://files.hawaii.gov/dbedt/economic/data_reports/reports-studies/ElectricityReport2013.pdf

<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 2014.

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) †	7,299	8,029	8,265	8,486	8,680	8,863
Visitor days (thousands) †	68,467	74,519	75,650	77,734	79,522	81,201
Visitor expenditures (million dollars) †	12,180	14,365	14,790	15,405	16,176	16,946
Honolulu CPI-U (1982-84=100)	243.6	249.5	253.7	259.0	265.5	273.5
Personal income (million dollars)	60,095	62,330	64,823	68,388	72,013	75,973
Real personal income (millions of 2000\$) ‡	43,488	44,047	45,044	46,544	47,815	48,976
Non-agricultural wage & salary jobs (thousands)	594.0	605.3	613.2	624.2	634.8	644.3
Civilian unemployment rate	6.5	5.8	4.6	4.2	4.0	3.8
Gross domestic product (million dollars)	70,006	72,424	75,497	79,171	82,814	86,540
Real gross domestic product (millions of 2005\$)	60,899	61,877	63,362	65,136	66,765	68,300
Gross domestic product deflator (2005=100)	115.0	117.0	119.2	121.5	124.0	126.7
Annual Percentage Change						
Total population	1.0	1.0	1.0	1.0	1.0	1.0
Visitor arrivals	4.0	10.0	2.9	2.7	2.3	2.1
Visitor days	4.6	8.8	1.5	2.8	2.3	2.1
Visitor expenditures	10.1	17.9	3.0	4.2	5.0	4.8
Honolulu CPI-U	3.7	2.4	1.7	2.1	2.5	3.0
Personal income	5.8	3.7	4.0	5.5	5.3	5.5
Real personal income	2.0	1.3	2.3	3.3	2.7	2.4
Non-agricultural wage & salary jobs	1.2	1.9	1.3	1.8	1.7	1.5
Civilian unemployment rate ‡	-0.3	-0.7	-1.2	-0.4	-0.2	-0.2
Gross domestic product	4.1	3.5	4.2	4.9	4.6	4.5
Real gross domestic product	2.1	1.6	2.4	2.8	2.5	2.3
Gross domestic product deflator (2005=100)	2.0	1.8	1.8	2.0	2.1	2.2

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

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

‡ Absolute change from previous year.

Source: Hawaii State Department of Business, Economic Development & Tourism, November 29, 2013.

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



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

Latest Hawaii Census Data

Hawaii Population Characteristics 2013

The July 1, 2013 population for the State of Hawaii was released on December 30, 2013. Our population is 1,404,054. There was an increase of about 14,000 people to our state between July 1, 2012 and July 1, 2013 which represented a 1.0% increase in our population.

Census Bureau has also released highlights for the 2012 ACS 5-year data. The link is at: http://www.census.gov/acs/www/data_documentation/geography/

Highlights

- The 2012 ACS estimates include data products for the 113th Congressional Districts, and the 2008-2012 ACS 5-year data release will include 2013 State Legislative District estimates. These geographic areas will only include a limited set of summary levels for the 2012 data releases. The 113th Congressional District and 2013 State Legislative District definitions took effect in January 2013.
- ACS estimates for Metropolitan and Micropolitan Statistical Areas continue to use December 1, 2009 definitions. These geographic areas will use the February 2013 delineation based on 2010 standards and Census Bureau data for the 2013 ACS data release planned for 2014.

Release Notes

- The 2012 ACS data release marks the first time estimates based on 2010 Census definitions for Public Use Microdata Areas (PUMAs), Urban Areas, and Urban/Rural are available.
- Geography plays an important role in Census Bureau activities, including supporting the American Community Survey. It is the framework by which the Census Bureau collects and publishes demographic, social, housing, and economic data. Geography contributes to, and is involved in, ACS sampling, data collection, weighting, and data tabulation activities.

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



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GETTING TO KNOW HAWAII'S CENSUS GEOGRAPHY (Based on the 2010 Census geography)

Hawaii has 5 counties, one of which is Kalawao County. The 5 counties in the State of Hawaii are Honolulu, Hawaii, Kalawao, Kauai and Maui. Kalawao County is the part of Molokai Island known as the Kalaupapa Settlement.

Islands are not a separate census geographic level. The 7 populated islands are Hawaii, Maui, Lanai, Molokai, Oahu, Kauai and Niihau. To obtain data for the island areas of Maui County and Kauai County, census tracts must be utilized. Within Maui County, Lanai Island consists of census tract 316.01; Molokai Island consists of census tracts 317, 318.01, and 319 (the census tract that is a part of Kalawao County); and Maui island consists of the remaining census tracts in the county. Within Kauai County, Niihau and Kaula Island is census tract 412 and Kauai Island consists of the remaining tracts in the county.

Census designated places (CDPs) do not cover all land area in Hawaii and their boundaries may change over time. Census Designated Places (CDPs) are the statistical counterparts of incorporated places, and are delineated to provide data for settled concentrations of population that are identifiable by name but are not legally incorporated under the laws of the state in which they are located. CDP boundaries may change from one decennial census to the next with changes in the settlement pattern; a CDP with the same name as in an earlier census does not necessarily have the same boundary. Therefore, CDPs are concentrations of population that only cover selected land areas in Hawaii. CDPs are also referred to as “cities” for only the State of Hawaii. The shortened term of “places” may also be used.

The census geographic level of Hawaiian Home Land first appeared in the Census 2000. “Hawaiian home lands are unique to Hawaii and are lands held in trust for Native Hawaiians by the state, pursuant to the Hawaiian Homes Commission Act of 1920, as amended”. These boundaries are designated by the Department of Hawaiian Home Lands which is a part of the Hawaii State Government system.

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

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

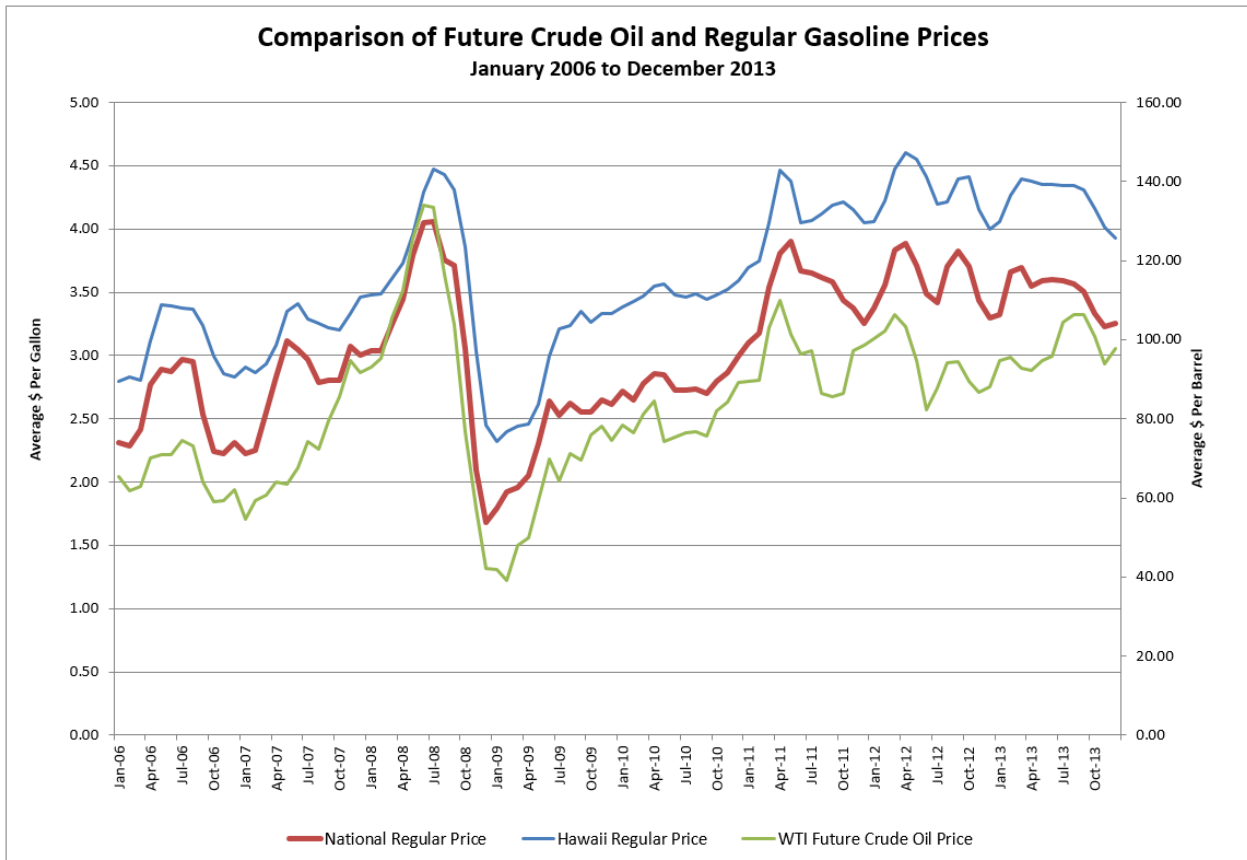


Monthly Energy Trend Data

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 December 2013, Hawaii's price for regular gasoline averaged \$3.925 per gallon, which was \$0.671 per gallon or 20.6 percent higher than the national average for the same month.

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.

Census date	Total population		City & County of Honolulu	Hawaii County	Kauai County	Maui County 2/
	Number	Percent change 1/				
1831-32 3/	130,313	(X)	29,755	45,792	12,024	42,742
1835-36 4/	108,579	-4.6	27,809	39,364	9,927	31,479
1850: January	84,165	-1.8	25,440	25,864	7,670	25,191
1853: Dec. 26	73,138	-3.5	19,126	24,450	7,781	21,781
1860: Dec. 24	69,800	-0.7	21,275	21,481	7,134	19,910
1866: Dec. 7	62,959	-1.7	19,799	19,808	6,624	16,728
1872: Dec. 27	56,897	-1.7	20,671	16,001	5,194	15,031
1878: Dec. 27	57,985	0.3	20,236	17,034	5,811	14,904
1884: Dec. 27	80,578	5.5	28,068	24,991	8,935	18,584
1890: Dec. 28	89,990	1.8	31,194	26,754	11,859	20,183
1896: Sept. 27	109,020	3.3	40,205	33,285	15,392	20,138
1900: June 1	154,001	9.4	58,504	46,843	20,734	27,920
1910: April 15	191,874	2.2	81,993	55,382	23,952	30,547
1920: January 1	255,881	3.0	123,496	64,895	29,438	38,052
1930: April 1	368,300	3.6	202,887	73,325	35,942	56,146
1940: April 1	422,770	1.4	257,696	73,276	35,818	55,980
1950: April 1	499,794	1.7	353,020	68,350	29,905	48,519
1960: April 1	632,772	2.4	500,409	61,332	28,176	42,855
1970: April 1	769,913	2.0	630,528	63,468	29,761	46,156
1980: April 1	964,691	2.3	762,565	92,053	39,082	70,991
1990: April 1	1,108,229	1.4	836,231	120,317	51,177	100,504
2000: April 1	1,211,537	0.9	876,156	148,677	58,463	128,241
2010: April 1	1,360,301	1.2	953,207	185,079	67,091	154,924

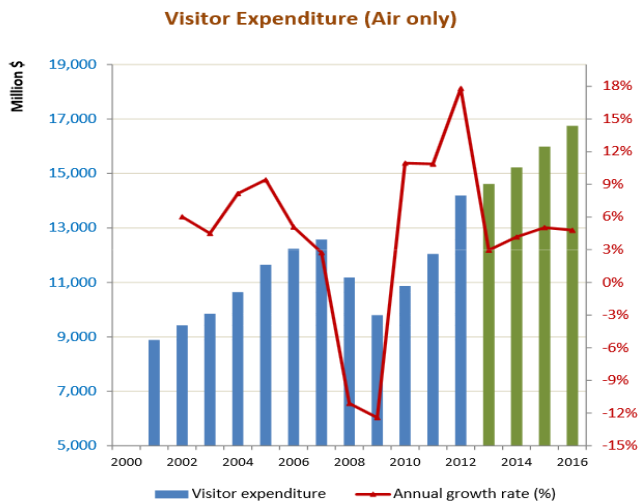
To see the entire **Hawaii Data Book**, go to: <http://dbedt.hawaii.gov/economic/databook/db2012/>.

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

Tourism Sector Continues to Improve

Visitor arrivals are expected to increase 2.9 percent in 2013, 1.4 percentage points below the previous forecast. The forecast for visitor days in 2013 decreased from 2.7 percent to 1.5 percent. Readers interested in visitor statistics on a monthly basis can find them on the DBEDT website at: <http://dbedt.hawaii.gov/visitor/tourism-forecast/>. Those interested in daily passenger arrival data may access those at: http://dbedt.hawaii.gov/economic/data_reports/special/

DBEDT Forecasts (4Q 2013): Visitor Expenditure



	Air only		Total	
	\$million	annual growth (%)	\$million	annual growth (%)
2005	11,650	9.4%	11,904	9.6%
2006	12,243	5.1%	12,492	4.9%
2007	12,578	2.7%	12,811	2.6%
2008	11,182	-11.1%	11,398	-11.0%
2009	9,794	-12.4%	9,993	-12.3%
2010	10,867	10.9%	11,066	10.7%
2011	12,047	10.9%	12,180	10.1%
2012	14,193	17.8%	14,365	17.9%
2013	14,612	3.0%	14,790	3.0%
2014	15,222	4.2%	15,405	4.2%
2015	15,988	5.0%	16,176	5.0%
2016	16,753	4.8%	16,946	4.8%

DBEDT Forecasts (4Q 2013): Visitor Arrival

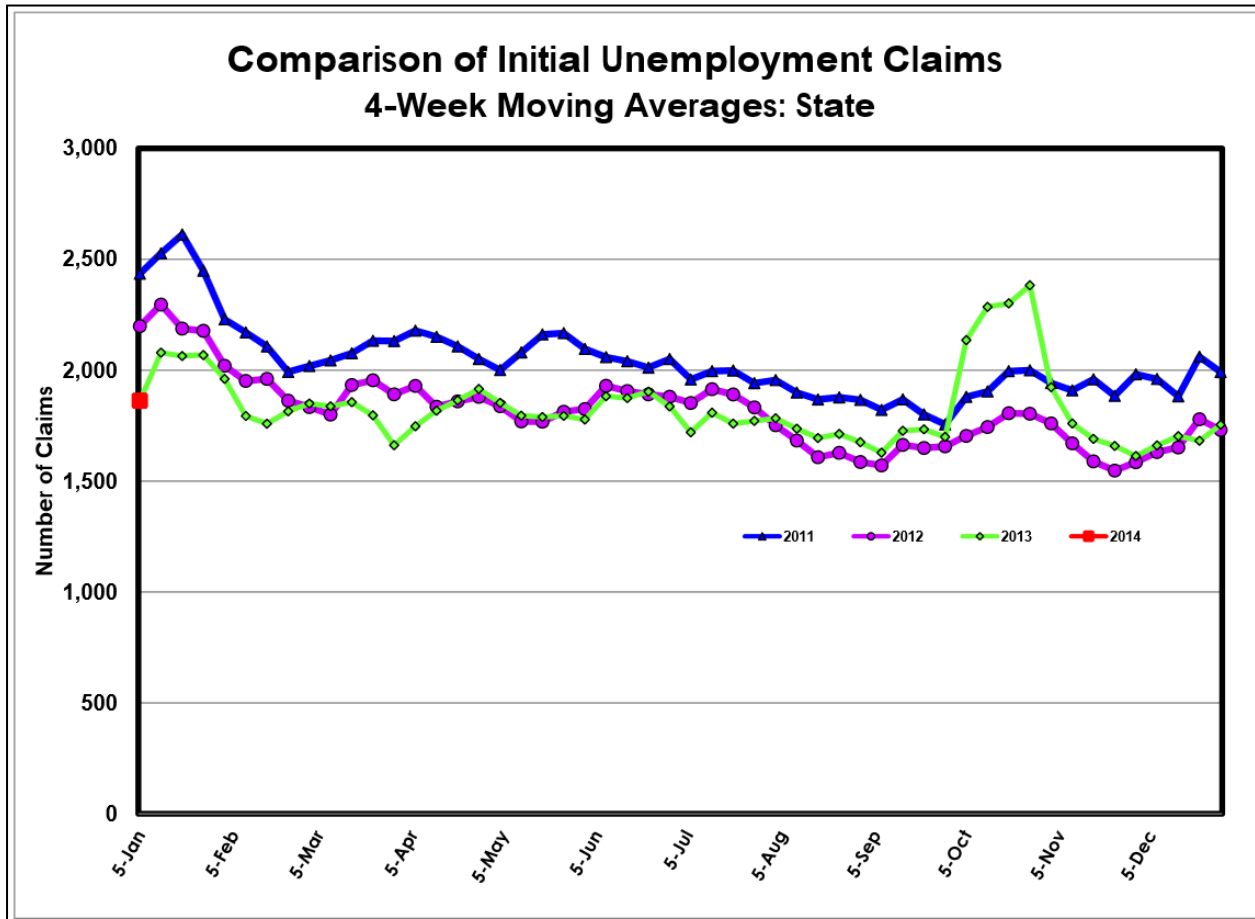


	Air only		Total	
	person	annual growth (%)	person	annual growth (%)
2005	7,416,574	7.3%	7,494,236	7.2%
2006	7,528,105	1.5%	7,628,117	1.8%
2007	7,496,820	-0.4%	7,627,819	0.0%
2008	6,713,436	-10.4%	6,822,912	-10.6%
2009	6,420,448	-4.4%	6,517,054	-4.5%
2010	6,916,894	7.7%	7,018,133	7.7%
2011	7,174,398	3.7%	7,299,048	4.0%
2012	7,867,143	9.7%	8,028,742	10.0%
2013	8,090,000	2.8%	8,265,000	2.9%
2014	8,311,000	2.7%	8,486,000	2.7%
2015	8,505,000	2.3%	8,680,000	2.3%
2016	8,687,000	2.2%	8,863,000	2.1%

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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