



	<u>DMA</u>	<u>U.S. Rank</u>	<u>CBSA</u>	<u>U.S. Rank</u>
	#		#	
Households	438,900	#71	304,500	#62
Population	1,294,900	#62	914,600	#53
EBI	\$25.8 Billion	#58	\$18.6 Billion	#56
Retail Sales	\$24.2 Billion	#55	\$16.0 Billion	#52

Market Highlights

- A leader in research/development of ocean industries, astronomy, volcanology; the biotechnology industry is expected to generate \$3.1 billion in revenues by 2010
- Hawaii's total resident population is projected to reach nearly 1.7 million people in 2035, a 33% increase in population from 2005 (*Dept. of Business, Economic Development and Tourism, 1/08*)
- Hawaii had over 80,000 new jobs created since December 2001; for the 1st quarter 2008, Hawaii had the lowest % unemployment rate of all U.S. states at 3.0%, and Honolulu is ranked #4 with an unemployment rate at 2.7% of all 370 U.S. metros (*U.S. Bureau of Labor Statistics, 5/08*)
- Of the top 75 DMAs, Honolulu's per HH rank is: #1 grocery stores, food service/drinking places, and clothing/accessories; #2 in gen'l merchandising & food/beverages; #5 in dept. stores & health/personal care; and is ranked in merchandising line sales per HH in: #1 in jewelry; #2 in grocery/other food & footwear; and #3 in men's/boys and women/girls' clothing; it is also ranked #3 in total retail sales per HH and #3 in 5-year % change; its \$55,154 in retail sales per HH is 30.4% higher than the U.S. average (\$42,283) (*Demographics USA, 2007*)
- Hawaii's technology market has more than doubled in past 10 years, & is ranked as the #4 state in % growth in the tech industry jobs from 2005-2006, a 6.3% increase; it is also ranked #4 as the fastest growth rate in tech wages since 2001, with a 11.7% jump; from 2001-2006, Hawaii added 1,100 jobs; in 2006, there were 15,000 high-tech jobs & nearly 1,400 high-tech establishments (*AEA Cyberstates '08*)
- Honolulu has 2 Fortune 1000 firms: Hawaiian Electric Industries and Alexander & Baldwin (*Fortune, 4/08*); other top employers include: Bank of Hawaii, BancWest, Queen's Medical Center, St. Francis Health System, Kaiser Medical, Straub Clinical, Oahu Transit Svc., Hawaiian Telcom, Hilton-Hawaiian Village Beach, Honolulu International Airport, NCL America, Roberts Overnights, Servco Pacific Inc., Sheraton-Waikiki, and Polynesian Cultural Center (*Hawaii Workforce Informer, 3/08*)
- Hawaii has the 2nd-largest military base in US; total defense expenditures were \$5.6 billion for fiscal year 2005, an increase of 8.7% over 2004; third-ranking state in annual per capita federal defense expenditures - \$3,939 per person; in the next 10 years, the military is expected to pump additional billions of dollars into the economy, and creating new jobs, housing (*Chamber of Commerce of Hawaii, 1/08*)
- Nearly 7.4 million people visited Hawaii last year; expenditures for the visitor industry totaled \$12.2 billion, or 22.4% of the gross state product, and accounting for nearly 220,000 jobs for 28% of total employment for the state (*State of Hawaii, Dept. of Business, Economic Development & Tourism, 2007 Annual Report*)
- The Honolulu Int'l Airport had 21.5 million air passengers in '07, an increase of 6.1% over last year
- Honolulu is ranked:
 - #1 "Most livable US city" in housing costs, schools, attractions, setting up business (*Monocle Magazine, 6/08*)
 - #1 "Best place to raise a family"-student-teacher ratio, test scores, budget, unemployment (*Best Life, 5/08*)
 - #1 "Greenest city"- best carbon footprint, generating least amount carbon dioxide (*Brookings Institution, 5/08*)
 - #1 "Best US city: best quality of life" for health, educ., social economic, & environment (*Mercer HRC, 4/07*)
 - #1 "Best U.S. destination for business travel" (*Economist Intelligence Unit, 4/08*)
 - #1 "Healthiest metro for women" for health care resources, fitness, parks, and crime (*Self Magazine, 11/06*)
 - #2 "Best city for vacation (overall)," & #1 for romantic escape; #2 adventure vacation (*Travel + Leisure, '07*)
 - #3 "Least polluted U.S. city" (*American Lung Association, 2008*)
 - #6 "Most energetic city" for health, wellness, & overall lifestyle (*Sperling'sBestPlaces/Tahitian Noni Int'l Hiro, 5/07*)
 - #8 "Top city for job growth" for information & transportation employment (*Inc. Magazine, 4/07, of 450,000+ jobs*)
 - #8 "Top city for progress and innovation for technology & electronic government" (*Digital Cities Survey, '07*)

Source: Demographics USA, 2007;

The Honolulu Advertiser Delivers the Honolulu Market

Newspapers First
THE LEADER IN MAJOR MARKETS



	<u>Circulation</u>			<u>Readership</u>	
	<u>Daily</u>	<u>Sunday</u>		<u>Daily</u>	<u>Sunday</u>
Total	141,674	158,364	DMA	370,544	428,573
DMA	141,496	157,988	College Grad+	112,738	130,443
Metro	128,633	148,020	Prof/Managerial	90,653	102,656
			Average HH Income	\$95,512	\$93,549
			DMA Reader Income	\$35.4 Billion	\$40.1 Billion

Newspaper Highlights

- Newspaper is the medium that reaches the most upscale, high-end consumers in the Honolulu DMA. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the Honolulu DMA:

	<i>Newspaper Quintile 1</i>	<i>Radio Quintile 1</i>	<i>TV Quintile 1</i>		<i>Newspaper Quintile 1</i>	<i>Radio Quintile 1</i>	<i>TV Quintile 1</i>
Hm Improvement Loan	157	117	55	Home equity loan	140	94	109
Post grad degree+	156	109	173	Own CD's	130	93	85
Prof'l/Related Occ.	144	116	71	Own bonds	124	88	90

- Based in the state capital, the Advertiser is the largest newspaper in the state
- Daily Honolulu Advertiser readers have a HHI 11% higher than the DMA average HHI—over \$9,300; on Sunday, readers have a HHI 9% higher (over \$7,300 more) than the average for DMA adults
- The Honolulu Advertiser has the 2nd and 12th highest daily and Sunday household coverage within the top 75 DMAs (*Demographics USA, 2007; Circulation 2008*)

- The Honolulu Advertiser reaches up to 282% more readers than the #2 paper, The Star Bulletin:

<u>Daily Readers</u>	<u>Advertiser</u>	<u>Star-Bulletin</u>	<u>% Advantage</u>	<u>Sunday Readers</u>	<u>Advertiser</u>	<u>Star-Bulletin</u>	<u>% Advantage</u>
Total Adults	370,544	138,227	168%	Total Adults	428,573	137,762	211%
HHI \$100,000+	111,701	35,808	212%	Upscale Hotel	39,118	10,241	282%
Finc'l Planner	88,098	29,104	204%	Rent Car-Pers/Vac	187,788	49,771	277%
Money Mkt Acc't	68,174	22,568	202%	Visit Europe	47,244	13,815	242%
Sngl family hm	256,305	90,391	184%	College graduate+	130,443	42,546	207%
Own a DVR	125,183	44,831	179%	1+ Cruise Pst 3 Yrs	41,230	13,676	201%

- The Honolulu Advertiser provides far greater coverage of metro adults than A.M. drive time radio, or even 1 prime time TV spot each from ABC, CBS, FOX, & NBC combined:

<u>% Metro Adults</u>		<u>% Metro Adults</u>	
Daily Honolulu Advertiser	49%	A.M. Drive Time Radio (average ¼ hour, 38 stations)	22%
Sunday Honolulu Advertiser	58%	Prime Time TV: ABC, CBS, FOX, and NBC	13%

- The Honolulu Advertiser duplicates 89,978, or 65%, of the Star-Bulletin's daily total adult readership, and duplicates 89,666, or 65%, on Sunday
- Compared to the average adult in the U.S., daily Honolulu Advertiser DMA readers are:
158% more likely to have home value \$300M+ 53% more likely to own second home/property
119% more likely to own/lse foreign luxury vehicle 41% more likely to have mutual funds
55% more likely to own 2+ new cars 38% more likely to own IRA
- Compared to the average adult in the U.S., Sunday Honolulu Advertiser DMA readers are:
159% more likely to use a travel agent 55% more likely to own high definition T.V.
69% more likely to rent a car – any purpose 46% more likely to rent a car for business
56% more likely to own bonds 33% more likely to have an online service

- The HonoluluAdvertiser.com website for the Honolulu Advertiser is the area's most powerful medium for effective online advertising, with 1.4 million unique visitors monthly (*Honolulu Advertiser Media Kit, 2008*)

Source: Scarborough 2008, rel. 1; Circulation 2008