



Europe Fact Sheet

Europe Overview

Operating as Hawai'i Tourism Europe (HTE), Emotive Travel Marketing (ETM) Ltd, has been selected by the Hawai'i Tourism Authority (HTA) to represent the Hawaiian Islands in the United Kingdom. ETM Group's counterpart in Europe, New Age Marketing, will be responsible for the German and Swiss markets. In 2024, HTE will work to educate visitors about traveling mindfully to support Hawai'i's communities, build strategic partnerships, and achieve meaningful growth in the European markets with primary focus on the UK, Germany, and Switzerland.

Year-to-Date September 2024 Quick Facts^{1/}

Visitor Expenditures:	\$189.0 million
Primary Purpose of Stay:	Pleasure (59,203) vs. MCI (3,958)
Average Length of Stay:	13.06 days
First Time Visitors:	67.8%
Repeat Visitors:	32.2%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Sep. 2024P ^{1/}	YTD Sep. 2023	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	369.0	261.9	189.0	288.0	-34.4%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,150,933	902,170	1,180,999	-23.6%
Arrivals	137,908	21,550	18,775	114,041	117,241	85,571	69,088	91,227	-24.3%
Average Daily Census	4,877	810	863	4,364	4,156	3,145	3,293	4,326	-23.9%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	243.2	227.5	209.5	243.9	-14.1%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,147.0	3,060.2	2,735.7	3,157.2	-13.3%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.45	13.06	12.95	0.9%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2024 annual forecast (Quarter 3, 2024).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism Europe: Andreas Schunck, Account Director
 Tel: 49 173 5614987
andreas@hawaiiitourismeurope.com

^{1/} 2024P visitor data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office (NTTO). 2019 – 2023 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the NTTO and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first nine months of 2024, 69,088 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$189.0 million. It should be noted that 2024 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office. There were 91,227 visitors in the first nine months of 2023 and visitor spending was \$288.0 million. In the first nine months of pre-pandemic 2019, 103,667 visitors arrived from this market and visitor spending was \$211.3 million.
- In 2023, there were 117,241 visitors from Europe, compared to 114,041 visitors (+2.8%) in 2022 and 137,908 visitors (-15.0%) in 2019.
- Visitors from Europe spent \$369.0 million in 2023, compared to \$306.0 million (+20.6%) in 2022 and \$268.1 million (+37.6%) in 2019. Daily visitor spending in 2023 was \$243 per person, higher than 2022 (\$192 per person, +26.6%) and 2019 (\$151 per person, +61.5%).

Market Conditions

- In September 2024, the British Pound experienced a slight appreciation, reaching 1.31 USD. The Euro averaged around 1.11 USD, reflecting an increase of approximately 3.7 percent compared to August 2024. The CHF/USD exchange rate averaged 1.12 USD, indicating a minor depreciation from August 2024, when it averaged 1.15 USD.
- In the UK, economic growth in 2024 has exceeded expectations, while inflation has returned to the Bank of England's target of 2.0 percent. The GfK Consumer Confidence indicator remains at -13.0, unchanged from August 2024. Despite this negative figure, it represents the highest level since September 2021, suggesting a growing sense of optimism among consumers over the past three years.
- In Germany, after a notable decline in the previous month, consumer sentiment showed a slight recovery in September 2024. Improvements in income expectations and purchasing willingness have contributed to a projected increase in the consumer climate for October 2024, rising by 0.7 points to -21.2 points from -21.9 points of the previous month.
- In Switzerland, consumer sentiment remained relatively stable in September 2024 compared to the prior month. The monthly consumer sentiment index from the State Secretariat for Economic Affairs (SECO) recorded -34.0 points, up from -35.0 points in August 2024. This figure is higher than the level recorded a year ago, as reported by SECO.
- In the UK, the shoulder season is emerging as a popular time for travel, with many consumers opting to begin their summer vacations earlier and take breaks outside the peak summer period. This trend is anticipated to continue growing into 2025 and beyond, according to a report from British Airways Holidays.
- According to TUI Germany, travel trends for 2025 include: an increase in multi-generational travel involving the entire family, including grandparents; a rise in solo travel, which allows individuals to explore at their own pace and forge new connections; and a growing popularity of bleisure travel.
- Dertour is capitalizing on market opportunities following the bankruptcy of FTI. After acquiring IT service provider Anixe, the second-largest German tour operator has also taken over the FTI Wheels team.

- In Switzerland, Hotelplan Suisse is restructuring two key teams focused on long-haul travel. Effective September 1, 2024, Canada will be integrated into the USA department, while Oceania will receive increased focus within the company. By establishing a specialized North America division, Hotelplan Suisse aims to better utilize synergies between the U.S. and Canada, thereby offering a more comprehensive and targeted product range along with enhanced customer support for this region.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P ¹	YTD Sep. 2023	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	54,158	71,967	-24.7%
Maui County	61,575	8,535	6,129	47,654	39,712	23,147	32,685	-29.2%
Maui	60,596	8,315	5,967	46,788	38,675	22,890	31,924	-28.3%
Moloka'i	1,772	433	245	1,641	1,164	459	938	-51.1%
Lāna'i	1,630	253	221	1,247	1,846	327	1,360	-76.0%
Kaua'i	35,498	4,696	3,135	27,333	28,113	17,077	21,932	-22.1%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	21,534	28,189	-23.6%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Sep. 2024P ¹	YTD Sep. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,888	2,873	3,564	-19.4%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	51,621	67,851	-23.9%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	59,203	79,266	-25.3%
MCI (Net)	5,449	2,047	348	5,493	6,102	3,958	4,825	-18.0%
Convention/Conf.	2,938	829	156	2,697	3,438	2,245	2,498	-10.1%
Corp. Meetings	974	372	140	1,202	1,289	679	1,059	-35.8%
Incentive	1,753	967	82	1,810	1,645	1,182	1,505	-21.5%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Sep. 2024P ¹	YTD Sep. 2023	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	67.8	68.9	-1.1
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	32.2	31.1	1.1

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Sep. 2024P ¹	YTD Sep. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	31.29	NA	6.17	35.50	42.80	21.92	33.41	-34.4%

*State government tax revenue generated (direct, indirect, and induced)