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 November 2024 Quick Facts[1/]

Visitor Expenditures:	$240.2 million
Primary Purpose of Stay:	Pleasure (72,089) vs. MCI (4,968)
Average Length of Stay:	13.04 days
First Time Visitors:	67.7%
Repeat Visitors:	32.3%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Nov. 2024P[/1]	YTD Nov. 2023	% Change
Visitor Expenditures* ($ Millions)	268.1	NA	52.9	306.0	369.0	273.7	240.2	341.0	-29.6%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,250,378	1,112,402	1,409,879	-21.1%
Arrivals	137,908	21,550	18,775	114,041	117,241	95,461	85,293	109,464	-22.1%
Average Daily Census	4,877	810	863	4,364	4,156	3,416	3,321	4,221	-21.3%
Per Person Per Day Spending* ($)	150.6	NA	167.9	192.1	243.2	218.9	216.0	241.9	-10.7%
Per Person Per Trip Spending* ($)	1,943.9	NA	2,815.3	2,683.4	3,147.0	2,867.3	2,816.5	3,115.2	-9.6%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.10	13.04	12.88	1.3%

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.
*Dept. of Business, Economic Development & Tourism (DBEDT) 2024 annual forecast (Quarter 4, 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@hawaiitourismeurope.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 11 months of 2024, 85,293 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was $240.2 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 109,464 visitors in the first 11 months of 2023 and visitor spending was $341.0 million. In the first 11 months of pre-pandemic 2019, 127,656 visitors arrived from this market and visitor spending was $255.5 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

- The British Pound has slightly weakened against the US Dollar, with the exchange rate at 1.26 USD per Pound. Germany's exchange rate remains relatively stable, hovering around $1.08 to the Dollar. The Swiss Franc continues to be strong and stable against the US Dollar, averaging around 0.887 USD per Franc.
- The UK Office for Budget Responsibility (OBR) forecasts a 1.1 percent growth in the UK economy for 2024, with a 2 percent growth expected in 2025. The first budget under the new Labour Government, presented in October 2024, has faced criticism due to increases in National Insurance and taxes. However, it includes plans to raise the national minimum wage and boost public spending.
- The International Monetary Fund (IMF) reports that Germany's GDP is projected to grow by just 0.3 percent in 2024, as the country continues to face challenges such as energy price pressures and weak domestic demand.
- The IMF suggests Switzerland's growth will remain modest in 2024, with an expected increase of around 0.6 percent. Despite this subdued growth, Switzerland's economy is anticipated to stay resilient, although global inflationary pressures and weaker demand from key export markets continue to pose challenges.
- Research from ABTA's annual Travel Trend Report (UK) covering the past 12 months and year ahead highlighted the following key travel trends:
    - A growing trend for long-haul travel, particularly to the 'Rest of the World (excluding Europe and North America).
    - Increasing numbers booking 5-star accommodation, led by Gen Z.
    - Couples-only holidays are on the rise, particularly amongst the 25-44 age group. This is not exclusive to those without children, with parents increasingly talking couple's getaways.
    - While new technologies like AI are gaining traction, traditional sources such as holiday brochures remain popular across all age groups, with Gen Z using both methods equally for travel inspiration.
- A recent study by Marriott Bonvoy, surveying over 21,000 people across Europe, the Middle East, and Africa, reveals that German travelers are optimistic and ambitious about 2025, despite economic uncertainties. Key findings include:
    - Resilience and Wanderlust: 77 percent of Germans plan to travel as much or more in 2025, with younger travelers (18-34) leading the growth, seeking new experiences.
    - Love for Advance Planning: Germans are meticulous planners, booking vacations an average of 4.6 months ahead and planning 4.5 trips, including domestic, short-haul, and long-haul journeys.
    - Prioritizing Indulgence and Relaxation: 59 percent see vacations as a time for indulgence, with hiking, cycling, and beach activities becoming more popular. Nature-focused experiences are also on the rise, with 40 percent prioritizing them.

- Focus on Sustainability: 67 percent of Germans consider the environmental impact of their trips, favoring hotels that use renewable energy and support local communities.
- Luxury with Responsibility: Affluent Germans (household income over €180,000) prioritize luxury travel, averaging 4.8 international trips annually. They seek five-star hotels but demand sustainable practices, such as renewable energy and waste reduction.
- Unique Experiences: Germans are increasingly viewing travel as an investment in personal happiness, with 62 percent placing it as a top spending priority, seeking wellness retreats, private tours, and authentic local experiences.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P/1	YTD Nov. 2023	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	65,842	86,387	-23.8%
Maui County	61,575	8,535	6,129	47,654	39,712	28,441	37,653	-24.5%
Maui	60,596	8,315	5,967	46,788	38,675	28,137	36,718	-23.4%
Moloka'i	1,772	433	245	1,641	1,164	562	1,061	-47.0%
Lāna'i	1,630	253	221	1,247	1,846	389	1,602	-75.7%
Kaua'i	35,498	4,696	3,135	27,333	28,113	20,814	26,189	-20.5%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	27,813	34,427	-19.2%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air))	2019	2020*	2021	2022	2023	YTD Nov. 2024P/1	YTD Nov. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,888	3,669	4,616	-20.5%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	63,935	81,697	-21.7%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	72,089	94,421	-23.7%
MCI (Net)	5,449	2,047	348	5,493	6,102	4,968	5,760	-13.8%
Convention/Conf.	2,938	829	156	2,697	3,438	3,077	3,125	-1.5%
Corp. Meetings	974	372	140	1,202	1,289	778	1,269	-38.7%
Incentive	1,753	967	82	1,810	1,645	1,279	1,635	-21.7%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Nov. 2024P/1	YTD Nov. 2023	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	67.7	69.0	-1.2
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	32.3	31.0	1.2

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Nov. 2024P/1	YTD Nov. 2023	% Change
State tax revenue generated ($ Millions) 2/	31.29	NA	6.17	35.50	42.80	27.87	39.56	-29.6%

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