Europe Fact Sheet

Europe Overview

The Hawai‘i Tourism Authority selected Emotive Travel Marketing (ETM) Ltd. for Brand Marketing and Management Services in Europe with primary focus in UK, Germany and Switzerland. In 2025, Hawai‘i Tourism Europe (THE) employs a strategic mix of innovative consumer marketing, public relations, and trade partnerships to strengthen Hawai‘i's brand awareness in the region.

Year-to-Date February 2025 Quick Facts[1/]

Visitor Expenditures:	$36.0 million
Primary Purpose of Stay:	Pleasure (7,422) vs. MCI (1,435)
Average Length of Stay:	13.62 days
First Time Visitors:	57.8%
Repeat Visitors:	42.2%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024P/1	2025 Annual Forecast*	YTD Feb. 2025P/1	YTD Feb. 2024P/1	% Change
Visitor Expenditures* ($ Millions)	268.1	NA	52.9	306.0	369.0	257.7	281.7	36.0	35.1	2.5%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,194,789	1,244,058	133,090	154,230	-13.7%
Arrivals	137,908	21,550	18,775	114,041	117,241	91,110	95,697	9,773	10,807	-9.6%
Average Daily Census	4,877	810	863	4,364	4,156	3,264	3,408	2,256	2,570	-12.2%
Per Person Per Day Spending* ($)	150.6	NA	167.9	192.1	243.2	215.7	226.5	270.4	227.6	18.8%
Per Person Per Trip Spending* ($)	1,943.9	NA	2,815.3	2,683.4	3,147.0	2,828.2	2,943.9	3,681.8	3,248.8	13.3%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.11	13.00	13.62	14.27	-4.6%

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) 2025 annual forecast (Quarter 1, 2025).

Contact Information

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

Hawai‘i Tourism Europe: Amy Waller, Account Director
Tel: +44 7858 893658
amy@hawaiitourismeurope.com

[1] 2024P and 2025P 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 two months of 2025, 9,773 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland), total visitor spending was $36.0 million and daily spending was $270 per person. In the first two months of 2024, there were 10,807 visitors, with $35.1 million in total visitor spending and daily spending was $228 per person. It should be noted that 2024 and 2025 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office.
- Preliminary data show 91,110 visitors from Europe in 2024, total visitor spending was $257.7 million and daily spending was $216 per person.
- There were 117,241 visitors in 2023, total visitor spending was $369.0 million and daily spending was $243 per person.
- In pre-pandemic 2019, 137,908 visitors arrived from this market, total visitor spending was $268.1 million and daily spending was $151 per person.

Market Conditions

- In January 2025, the British Pound (GBP) fell 0.7 percent against the US Dollar (USD), marking its fourth consecutive monthly decline and a 7.5 percent drop since September 2024. This is due to concerns over the UK economy, including rising unemployment, weak consumer spending, and slowing business activity. Analysts have lowered growth forecasts by 1-2 percent, with growth expected to be driven by consumer spending, wage increases, and government spending, though trade frictions may hinder global investment.
- As of January 2025, the German economy faces structural challenges, with GDP contracting by 0.2 percent in Q4 2024. This led the government to lower its 2025 growth forecast to 0.3 percent. Inflation is projected at 2.3 percent, and while business sentiment has slightly improved, uncertainty remains. A slow recovery is expected, but weak demand and structural issues will continue to limit growth. Additionally, the weaker euro, at $1.036 against the U.S. dollar, has made U.S. travel more expensive for Europeans.
- In December 2024, the Swiss government revised its economic growth forecasts, lowering the 2025 outlook to 1.5 percent from 1.6 percent, citing weak demand from key trading partners like Germany and China. Domestic demand is expected to drive short-term growth, with a forecasted 1.7 percent growth for 2026, indicating a gradual recovery. In January 2025, the Swiss franc (CHF) remained strong against the U.S. dollar, with exchange rates fluctuating between 1.0916 and 1.1059 USD per CHF.
- At the recent Wanderlust Reader Survey Luncheon in London, key travel trends were discussed, including Hawai'i being named the top U.S. travel destination, surpassing Alaska and the Pacific Northwest, highlighting its growing appeal. Additionally, 31 percent of survey respondents stated that the new U.S. administration could influence their travel plans, indicating that political shifts may play a significant role in shaping future travel decisions.
- The AITO Travel Insights 2025 Report, based on a survey of nearly 14,000 UK consumers in November 2024, revealed that 61 percent of respondents spent over £2,500 per person on holidays in 2024, with 80 percent willing to pay more for a better experience. It also showed that 83 percent of consumers view travel as an essential part of their lifestyle, with a 15.7 percent increase in travel intentions year-on-year, indicating strong demand. The US and Canada were the top long-haul destinations, while Spain, Italy, and France were the leading short-haul choices. Additionally, consumers aged 50-69 were particularly optimistic about their finances and travel plans for 2025.
- German airline Condor is expanding its summer 2025 network with new city connections and more frequent flights, including increased service to Miami. Meanwhile, in January 2025, Lufthansa announced that it will begin operating Airbus A380 flights from Munich to Denver starting April 30, 2025, marking the first scheduled A380 service to Denver International Airport.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	2024P/1	YTD Feb. 2025P/1	YTD Feb. 2024P/1	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	70,121	6,681	8,383	-20.3%
Maui County	61,575	8,535	6,129	47,654	39,712	30,461	3,652	2,969	23.0%
Maui	60,596	8,315	5,967	46,788	38,675	30,130	3,616	2,868	26.1%
Moloka'i	1,772	433	245	1,641	1,164	607	78	142	-45.4%
Lāna'i	1,630	253	221	1,247	1,846	428	37	73	-49.7%
Kaua'i	35,498	4,696	3,135	27,333	28,113	22,144	1,930	2,104	-8.3%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	29,624	2,850	3,056	-6.8%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air))	2019	2020*	2021	2022	2023	2024P/1	YTD Feb. 2025P/1	YTD Feb. 2024P/1	% Change
Group vs True Independent (Net)									
Group Tour	7,146	NA	521	4,892	4,888	3,816	645	765	-15.6%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	68,658	7,417	8,221	-9.8%
Leisure vs Business									
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	76,842	7,422	8,273	-10.3%
MCI (Net)	5,449	2,047	348	5,493	6,102	5,232	1,435	1,364	5.3%
Convention/Conf.	2,938	829	156	2,697	3,438	3,281	737	608	21.3%
Corp. Meetings	974	372	140	1,202	1,289	825	232	226	2.6%
Incentive	1,753	967	82	1,810	1,645	1,297	532	583	-8.9%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	2024P/1	YTD Feb. 2025P/1	YTD Feb. 2024P/1	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	67.1	57.8	56.3	1.5
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	32.9	42.2	43.7	-1.5

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	2024P/1	YTD Feb. 2025P/1	YTD Feb. 2024P/1	% Change
State tax revenue generated ($ Millions) 2/	31.29	NA	6.17	35.50	42.80	29.89	4.17	4.07	2.5%

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