



# 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 June 2025 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$114.0 million
Primary Purpose of Stay:	Pleasure (30,643) vs. MCI (3,920)
Average Length of Stay:	12.75 days
First Time Visitors:	65.7%
Repeat Visitors:	34.3%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024RP <sup>1/</sup>	2025 Annual Forecast*	YTD June 2025P <sup>1/</sup>	YTD June 2024RP <sup>1/</sup>	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	369.0	258.5	263.5	114.0	97.9	16.5%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,198,853	1,186,437	475,412	474,620	0.2%
Arrivals	137,908	21,550	18,775	114,041	117,241	91,429	91,264	37,273	35,955	3.7%
Average Daily Census	4,877	810	863	4,364	4,156	3,276	3,251	2,627	2,608	0.7%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	243.2	215.6	222.1	239.8	206.3	16.3%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,147.0	2,827.5	2,887.4	3,058.9	2,722.9	12.3%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.11	13.00	12.75	13.20	-3.4%

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 2, 2025).

## Contact Information

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<sup>1/</sup> 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.

RP=March and April 2024 data were revised.

## Market Summary

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- In the first half of 2025, 37,273 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland), total visitor spending was \$114.0 million and daily spending was \$240 per person. In the first half of 2024, there were 35,955 visitors, with \$97.9 million in total visitor spending and daily spending was \$206 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 91,429 visitors from Europe in 2024; total visitor spending was \$258.5 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 (Updated Quarterly)

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- The UK economy is grappling with global trade tensions and rising costs, leading to downgraded growth forecasts 0.8 percent for 2025 and 0.9 percent for 2026, with the IMF projecting a slightly higher 1.1 percent increase for 2025. Amid easing U.S. trade tensions, the pound has strengthened against the U.S. dollar, reaching a 38-month high. Meanwhile, European policymakers remain vigilant, as ongoing geopolitical and trade uncertainties pose risks to the region's export-driven economy.
- In April 2025, Germany's economy showed mixed performance, with moderate growth in the services sector but continued weakness in manufacturing due to subdued demand. GDP growth for the year is expected to be a modest 0.3 percent. While high inflation, particularly in energy and food persists, consumer confidence is stabilizing, supported by a strong labor market and steady wages. The euro stood at \$1.0863 at month's end, bolstered by Eurozone stability and concerns over U.S. fiscal policy, with analysts predicting it will remain between \$1.07 and \$1.09 in the short term.
- In April 2025, Switzerland's economy demonstrated resilience, with strong domestic consumption and financial services offsetting export challenges. The government upheld its 1.4 percent growth forecast, reflecting cautious optimism amid global trade uncertainties. Consumer confidence remained low, with the SECO index at -21, despite minor improvements. Inflation inched up to 0.4 percent, still among Europe's lowest while the Swiss National Bank maintained its accommodative policy with a 0.25 percent interest rate. The Swiss franc strengthened to 1 CHF = 1.145 USD, reaffirming its status as a safe-haven currency.
- UK outbound travel to the U.S. was strong in early 2025, with steady bookings and a 5 percent increase in visitor numbers, particularly to popular destinations like New York and California. However, recent data shows a decline, with UK visits down 14.3 percent in March and 67 percent of travel professionals reporting decreased bookings. Despite stable air capacity, forecasts predict a 9.4 percent drop in international U.S. arrivals in 2025, with full recovery not expected until 2029.
- German travel to the U.S. fell 28 percent in March 2025 due to political uncertainty, yet overall international travel demand remains strong. Summer 2025 bookings are up 14 percent year-on-year, with long-haul destinations like Asia and the Maldives driving a 13 percent revenue increase. Canusa Touristik reports steady U.S. interest, with 80 percent of forecasted 2025 bookings already secured, despite 85 percent of agencies citing concerns over declining demand linked to the U.S. political climate.
- Swiss travel to the U.S. fell 26 percent in March 2025, prompting significant airfare reductions, direct flights from Zurich to New York dropped to CHF 460, Boston under CHF 300, and West Coast routes from CHF 470, alongside declining hotel prices. This reflects broader hesitation amid global and U.S. political uncertainty, although the price drops may stimulate renewed interest in transatlantic travel in the coming months.

- UK: Virgin Atlantic has resumed flights between London Heathrow and Toronto, marking its return to the Canadian market after more than a decade and increasing transatlantic capacity.
- Germany: Discover Airlines has introduced new long-haul routes from Germany, including a Munich–Calgary service. Meanwhile, Condor Airlines plans to expand its international operations from Frankfurt in 2025 to enhance North American connectivity, with U.S. routes yet to be detailed.
- Switzerland: SWISS has reinstated its Zurich services to Washington, D.C., and Toronto as part of its expanded transatlantic summer 2025 schedule. Additionally, Edelweiss Air will launch new Zurich routes to Seattle on June 2 and Halifax on July 3, 2025, strengthening its long-haul network.

## Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	2024RP <sup>1</sup>	YTD June 2025P <sup>1</sup>	YTD June 2024RP <sup>1</sup>	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	70,365	27,607	27,759	-0.5%
Maui County	61,575	8,535	6,129	47,654	39,712	30,556	13,919	11,078	25.6%
Maui	60,596	8,315	5,967	46,788	38,675	30,224	13,795	10,892	26.7%
Moloka'i	1,772	433	245	1,641	1,164	608	214	263	-18.8%
Lāna'i	1,630	253	221	1,247	1,846	429	163	173	-5.8%
Kaua'i	35,498	4,696	3,135	27,333	28,113	22,239	8,400	8,574	-2.0%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	29,729	10,983	11,331	-3.1%

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air))	2019	2020*	2021	2022	2023	2024RP <sup>1</sup>	YTD June 2025P <sup>1</sup>	YTD June 2024RP <sup>1</sup>	% Change
Group vs True Independent (Net)									
Group Tour	7,146	NA	521	4,892	4,888	3,831	2,127	1,938	9.7%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	68,900	27,391	26,964	1.6%
Leisure vs Business									
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	77,115	30,643	29,507	3.9%
MCI (Net)	5,449	2,047	348	5,493	6,102	5,248	3,920	3,000	30.7%
Convention/Conf.	2,938	829	156	2,697	3,438	3,288	2,162	1,469	47.2%
Corp. Meetings	974	372	140	1,202	1,289	829	673	554	21.5%
Incentive	1,753	967	82	1,810	1,645	1,303	1,255	1,103	13.8%

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	2024RP <sup>1</sup>	YTD June 2025P <sup>1</sup>	YTD June 2024RP <sup>1</sup>	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	67.1	65.7	64.8	0.9
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	32.9	34.3	35.2	-0.9

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	2024RP <sup>1</sup>	YTD June 2025P <sup>1</sup>	YTD June 2024RP <sup>1</sup>	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	31.29	NA	6.17	35.50	42.80	29.99	13.23	11.36	16.5%

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced)

P=Preliminary data. RP=March and April 2024 preliminary data were revised.