



Europe Fact Sheet

Europe Overview

Operating as Hawai'i Tourism Europe (THE), 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 February 2024 Quick Facts¹

| | |
|--------------------------|--------------------------------|
| Visitor Expenditures: | \$19.3 million |
| Primary Purpose of Stay: | Pleasure (3,599) vs. MCI (567) |
| Average Length of Stay: | 16.08 days |
| First Time Visitors: | 56.1% |
| Repeat Visitors: | 43.9% |

| EUROPE MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023P | 2024 Annual Forecast* | YTD Feb. 2024P | YTD Feb. 2023P | % Change |
|-------------------------------------|-----------|---------|---------|-----------|-----------|-----------------------|----------------|----------------|----------|
| Visitor Expenditures* (\$ Millions) | 268.1 | NA | 52.9 | 306.0 | 300.6 | 302.3 | 35.1 | 35.7 | -1.5% |
| Visitor Days | 1,780,190 | 296,487 | 314,899 | 1,592,705 | 1,255,308 | 1,243,817 | 154,230 | 146,282 | 5.4% |
| Arrivals | 137,908 | 21,550 | 18,775 | 114,041 | 93,727 | 95,678 | 10,807 | 10,395 | 4.0% |
| Average Daily Census | 4,877 | 810 | 863 | 4,364 | 3,439 | 3,398 | 2,570 | 2,479 | 3.7% |
| Per Person Per Day Spending* (\$) | 150.6 | NA | 167.9 | 192.1 | 239.5 | 243.1 | 227.6 | 243.7 | -6.6% |
| Per Person Per Trip Spending* (\$) | 1,943.9 | NA | 2,815.3 | 2,683.4 | 3,207.0 | 3,159.7 | 3,248.8 | 3,430.0 | -5.3% |
| Length of Stay (days) | 12.91 | 13.76 | 16.77 | 13.97 | 13.39 | 13.00 | 14.27 | 14.07 | 1.4% |

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) 2024 annual forecast (Quarter 1, 2024).

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¹ 2023 and 2024 visitor data are preliminary. 2019 - 2022 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first two months of 2024, 10,807 visitors arrived from Europe ((including United Kingdom, France, Germany, Italy and Switzerland) and visitor spending was \$35.1 million. There were 10,395 visitors in the first two months of 2023 and visitor spending was \$35.7 million. In the first two months of pre-pandemic 2019, 16,305 visitors arrived from this market and visitor spending was \$33.7 million.
- In 2023, there were 93,727 visitors from Europe, compared to 114,041 visitors in 2022 and 137,908 visitors in 2019.
- Visitors from Europe spent \$300.6 million in 2023, compared to \$306.0 million in 2022 and \$268.1 million in 2019. Daily visitor spending in 2023 was \$239 per person, higher than 2022 (\$192 per person) and 2019 (\$151 per person).

Market Conditions

- In February 2024, 1 Euro was worth 1.07 USD. This reflects a minimal decrease compared to January 2024.
- Germany was slashing its expectations for gross domestic product growth for 2024 to 0.2 percent, down from a 1.3 percent estimate previously.
- UK economic growth accelerated in February 2024, with the early PMI survey data pointing to the fastest growth of business activity for nine months. This is by no means a one-off improvement, as accelerating growth has now been recorded for four straight months after a brief spell of decline late last year.
- Economic activity in Switzerland is expected to remain sluggish in the first part of 2024 amid euro area weakness but should pick up gradually from Quarter 2 onwards. Stripping out the impact of major sporting events, annual GDP growth is projected to be 0.9 percent in 2024, after an estimated 1.2 percent in 2023.
- More Germans want to go on holiday this year than in 2023 despite higher prices, an economic downturn and international conflicts – and more of them will head to foreign destinations than last year, according to the latest annual Tourism Analysis by the BAT Foundation for Future Studies. According to the consumer survey, 63 percent of Germans have already planned a holiday trip of at least five days for some time this year. This is three percentage points more than last year and only two percentage points below the pre-pandemic level.
- Switzerland indicates a potential of 380,000 arrivals in 2023 to the US, which corresponds to growth of 30 percent compared to 2022.
- For the UK, TTG Media conducted consumer research to identify which age brackets will spend more on their holidays in 2024 than 2023. Those aged 55 years+ stated that they will spend 15 percent more on their travel this year. Quality or High Value Travelers are increasingly seeking out off the beaten travel, experiential and sustainable holidays that take them beyond the main tourist sites.
- Among UK travelers, 57 percent now say sustainability issues are impacting their holiday taking with 14 percent saying they are changing how far they travel. 13 percent say they are changing how often they travel. Younger age groups are most likely to say they have already adjusted their holiday plans and a third of 45+ age groups also say it will affect their plans in the future.

- Travel Inside Switzerland conducted a survey amongst travel agents. The year 2024 appears to be a promising one for the Swiss travel industry, as 65.5 percent of survey participants were satisfied with the current booking situation, with 26.5 percent achieving a satisfactory result. 39 percent even stated that the current booking situation had met 100 percent of their expectations. According to the TI survey, two clear favorites are currently emerging among the destinations. 44 percent of customers book destinations in Europe and 43 percent book long-haul destinations.

Distribution by Island

| Europe MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023P | YTD Feb. 2024P | YTD Feb. 2023P | % Change |
|---------------------|---------|--------|--------|--------|--------|----------------|----------------|----------|
| O'ahu | 102,148 | 15,411 | 11,843 | 82,748 | 71,013 | 8,383 | 7,066 | 18.6% |
| Maui County | 61,575 | 8,535 | 6,129 | 47,654 | 32,726 | 2,969 | 4,162 | -28.7% |
| Maui | 60,596 | 8,315 | 5,967 | 46,788 | 31,976 | 2,868 | 4,087 | -29.8% |
| Moloka'i | 1,772 | 433 | 245 | 1,641 | 1,249 | 142 | 120 | 18.2% |
| Lāna'i | 1,630 | 253 | 221 | 1,247 | 938 | 73 | 106 | -31.3% |
| Kaua'i | 35,498 | 4,696 | 3,135 | 27,333 | 23,998 | 2,104 | 1,861 | 13.0% |
| Island of Hawai'i | 43,608 | 6,634 | 4,539 | 39,477 | 31,076 | 3,056 | 2,801 | 9.1% |

Group vs. True Independent; Leisure vs. Business

| Europe MMA (by Air) | 2019 | 2020* | 2021 | 2022 | 2023P | YTD Feb. 2024P | YTD Feb. 2023P | % Change |
|---------------------------------|---------|--------|--------|--------|--------|----------------|----------------|----------|
| Group vs True Independent (Net) | | | | | | | | |
| Group Tour | 7,146 | NA | 521 | 4,892 | 4,472 | 765 | 723 | 5.8% |
| True Independent (Net) | 96,836 | NA | 16,198 | 83,739 | 69,157 | 8,221 | 7,878 | 4.4% |
| Leisure vs Business | | | | | | | | |
| Pleasure (Net) | 121,207 | 17,442 | 14,071 | 97,416 | 79,681 | 8,273 | 8,119 | 1.9% |
| MCI (Net) | 5,449 | 2,047 | 348 | 5,493 | 5,528 | 1,364 | 1,275 | 6.9% |
| Convention/Conf. | 2,938 | 829 | 156 | 2,697 | 3,077 | 608 | 553 | 9.9% |
| Corp. Meetings | 974 | 372 | 140 | 1,202 | 1,221 | 226 | 240 | -5.9% |
| Incentive | 1,753 | 967 | 82 | 1,810 | 1,499 | 583 | 547 | 6.7% |

First Timers vs. Repeat Visitors

| Europe MMA (by Air) | 2019 | 2020* | 2021 | 2022 | 2023P | YTD Feb. 2024P | YTD Feb. 2023P | % Change |
|-------------------------|------|-------|------|------|-------|----------------|----------------|----------|
| First Time Visitors (%) | 69.9 | NA | 54.0 | 70.0 | 67.9 | 56.3 | 57.2 | -0.9 |
| Repeat Visitors (%) | 30.1 | NA | 46.0 | 30.0 | 32.1 | 43.7 | 42.8 | 0.9 |

Tax Revenue

| Europe MMA (by Air) | 2019 | 2020* | 2021 | 2022 | 2023P | YTD Feb. 2024P | YTD Feb. 2023P | % Change |
|---|-------|-------|------|-------|-------|----------------|----------------|----------|
| State tax revenue generated (\$ Millions) ^{2/} | 31.29 | 32.32 | 6.17 | 35.50 | 34.87 | 4.07 | 4.14 | -1.5% |

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