



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 December 2023 Quick Facts¹

Visitor Expenditures:	\$300.6 million
Primary Purpose of Stay:	Pleasure (79,681) vs. MCI (5,528)
Average Length of Stay:	13.39 days
First Time Visitors:	67.9%
Repeat Visitors:	32.1%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD Dec. 2023P	YTD Dec. 2022	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	310.5	300.6	306.0	-1.8%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,304,331	1,255,308	1,592,705	-21.2%
Arrivals	137,908	21,550	18,775	114,041	97,937	93,727	114,041	-17.8%
Average Daily Census	4,877	810	863	4,364	3,574	3,439	4,364	-21.2%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	238.1	239.5	192.1	24.6%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,170.8	3,207.0	2,683.4	19.5%
Length of Stay (days)	12.91	13.76	16.77	13.97	13.32	13.39	13.97	-4.1%

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) 2023 annual forecast (Quarter 4, 2023).

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

Market Summary

- For all of 2023, there were 93,727 visitors from Europe (including United Kingdom, France, Germany, Italy and Switzerland), compared to 114,041 visitors in 2022 and 137,908 visitors in 2019, prior to the COVID-19 pandemic.
- 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).
- In 2022, there were 114,041 visitors from Europe, compared to 18,775 visitors in 2021, 21,550 visitors in 2020 and 137,908 visitors in 2019. Total visitor spending was \$306.0 million in 2022 compared to \$52.9 million in 2021 and \$268.1 million in 2019.

Market Conditions

- Euro to U.S. Dollar exchange rate is currently at 1.094. The Swiss Franc to U.S. Dollar Exchange Rate is at 1.170 while the British Pound to US Dollar Exchange Rate is at 1.275.
- Germany's economy was 0.7 percent higher in 2023 than in 2019. However, analysts said Europe's largest economy was on track for another year of stagnant growth in 2024 at best, with a heightened risk of a second consecutive year of negative output.
- Britain's economy ended 2023 on a stronger footing than previously thought, according to a survey of businesses, amid other signs that the Bank of England's high interest rate campaign might not trigger a recession. The final S&P Global/CIPS UK Services Purchasing Managers' Index rose to 53.4 in December 2023, showing the sector grew more strongly in December than an initial reading of 52.7 and November 2023 index of 50.9.
- The consumer price index in Switzerland remained unchanged in December 2023 compared with the previous month at 106.2 points. Inflation was +1.7 percent compared with the same month of the previous year. The average annual inflation reached +2.1 percent in 2023.
- 46 percent of European holidaymakers spent more money on their trips in 2023 than in 2019, according to a survey of 3,000 holidaymakers in Europe by consultants Alvarez & Marsal (A&M). Among German holidaymakers, the figure is as high as 48 percent.
- Travel agencies in German speaking markets closed 2023 significantly better than the previous year. According to Tats-Reisebürospiegel, total turnover increased by 30.8 percent. In tourism, including cruises, turnover was 19.1 percent higher. Travel agencies are also up significantly in all segments compared to the pre-coronavirus year 2019.
- There is a willingness to pay for sustainability in the UK. Sustainability is no longer a choice but a conscious commitment. Gen Z and luxury travelers are especially willing to pay for responsible travel choices. However, providing transparency in where their money goes is key.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
O'ahu	102,148	15,411	11,843	82,748	71,013	82,748	-14.2%
Maui County	61,575	8,535	6,129	47,654	32,726	47,654	-31.3%
Maui	60,596	8,315	5,967	46,788	31,976	46,788	-31.7%
Moloka'i	1,772	433	245	1,641	1,249	1,641	-23.9%
Lāna'i	1,630	253	221	1,247	938	1,247	-24.8%
Kaua'i	35,498	4,696	3,135	27,333	23,998	27,333	-12.2%
Island of Hawai'i	43,608	6,634	4,539	39,477	31,076	39,477	-21.3%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
Group vs True Independent (Net)							
Group Tour	7,146	NA	521	4,892	4,472	4,892	-8.6%
True Independent (Net)	96,836	NA	16,198	83,739	69,157	83,739	-17.4%
Leisure vs Business		0					
Pleasure (Net)	121,207	17,442	14,071	97,416	79,681	97,416	-18.2%
MCI (Net)	5,449	2,047	348	5,493	5,528	5,493	0.6%
Convention/Conf.	2,938	829	156	2,697	3,077	2,697	14.1%
Corp. Meetings	974	372	140	1,202	1,221	1,202	1.6%
Incentive	1,753	967	82	1,810	1,499	1,810	-17.2%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	67.9	70.0	-2.1
Repeat Visitors (%)	30.1	NA	46.0	30.0	32.1	30.0	2.1

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	31.29	32.32	6.17	35.50	34.87	35.50	-1.8%

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