



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.

January 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	2023 Annual Forecast*	Jan. 2024P	Jan. 2023P	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	300.6	310.5	19.3	18.6	3.9%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,255,308	1,304,331	77,069	80,238	-3.9%
Arrivals	137,908	21,550	18,775	114,041	93,727	97,937	4,793	5,059	-5.3%
Average Daily Census	4,877	810	863	4,364	3,439	3,574	2,486	2,588	-3.9%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	239.5	238.1	250.9	231.9	8.2%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,207.0	3,170.8	4,034.4	3,677.6	9.7%
Length of Stay (days)	12.91	13.76	16.77	13.97	13.39	13.32	16.08	15.86	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) 2023 annual forecast (Quarter 4, 2023).

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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 DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In January 2024, there were 4,793 visitors from Europe (including United Kingdom, France, Germany, Italy and Switzerland), compared to 5,059 visitors in January 2023 and 8,022 visitors in pre-pandemic January 2019.
- Visitors from Europe spent \$19.3 million in January 2024, compared to \$18.6 million in January 2023 and \$19.3 million in January 2019. Daily visitor spending in January 2024 was \$251 per person, higher than January 2023 (\$232 per person) and January 2019 (\$163 per person).
- 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

- The overall economic situation in Germany at the turn of 2023/2024 remains weak due to the after-effects of the previous crises, in particular the considerable loss of purchasing power as a result of the massive rise in energy and food prices, the weak global economic development, the geopolitical crises and the tightening of monetary policy.
- The overall economic situation in the UK is improving slowly. Interest rates have remained unchanged but tensions in the Red Sea, the ongoing Israel-Gaza war and the war in Ukraine are stifling faster growth and causing supply disruptions. There is talk of a possible UK election in the latter part of 2024 which will potentially impact the economy and the strength of the Pound.
- Switzerland boasted a solid growth track record in the two decades leading up to the Covid-19 shock, recording average annual GDP growth of 2 percent – notably above the 1.7 percent for the Eurozone as a whole. The Swiss economy was more resilient than its European peers.
- The outlook for travel in 2024 is positive overall, according to a travel analysis by the Forschungsgemeinschaft Urlaub + Reisen (FUR). A good two thirds of German speaking holidaymakers plan one or more vacation trips. The indicators for tourism demand in 2024 reflect the current economic situation. "General worries about the future are not preventing people from traveling at the moment," according to the tourism research institute NIT. According to the FUR, more than four out of five holidaymakers (82%) were already thinking about vacation trips in 2024 in November. At 54 percent, the desire to go on vacation is high, as is the availability of time (63%).
- For the UK, Travel Weekly is reporting that demand for outbound travel in 2024 will remain robust despite some caution, as financial pressures on consumers' ease. Holidays and travel are seen as a priority in Britain and are one of the last items a household will be prepared to compromise on. In a consumer sentiment survey by PwC, 70 percent of respondents said they planned to spend the same or more on holidays in 2024. However, 15 percent said they were not yet sure, which was a higher percentage than the same survey the previous year.
- The largest European tour operators are seeing good demand for long-haul holidays this year – despite higher prices. These long-haul destinations are the most popular: Maldives, Thailand, Mexico, USA, Canada, Mauritius, Dominican Republic and United Arab Emirates.

- Condor Airlines (Germany) came out with B2B marketing activities promoting the fastest route from Germany to Hawai'i (18 hours and 30 minutes) via Seattle to Honolulu. Condor works closely with Alaskan Airlines as well as Hawaiian Airlines. Condor's hubs on the US mainland to the Hawaiian Islands are: Anchorage, Portland, Seattle, Las Vegas and Los Angeles.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
O'ahu	102,148	15,411	11,843	82,748	71,013	3,561	3,537	0.7%
Maui County	61,575	8,535	6,129	47,654	32,726	1,388	1,796	-22.7%
Maui	60,596	8,315	5,967	46,788	31,976	1,344	1,760	-23.6%
Moloka'i	1,772	433	245	1,641	1,249	61	73	-16.6%
Lāna'i	1,630	253	221	1,247	938	36	61	-40.4%
Kaua'i	35,498	4,696	3,135	27,333	23,998	933	922	1.1%
Island of Hawai'i	43,608	6,634	4,539	39,477	31,076	1,520	1,513	0.4%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,472	164	240	-31.8%
True Independent (Net)	96,836	NA	16,198	83,739	69,157	3,893	4,001	-2.7%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	79,681	3,599	3,883	-7.3%
MCI (Net)	5,449	2,047	348	5,493	5,528	567	607	-6.5%
Convention/Conf.	2,938	829	156	2,697	3,077	482	458	5.2%
Corp. Meetings	974	372	140	1,202	1,221	58	111	-48.3%
Incentive	1,753	967	82	1,810	1,499	35	71	-50.9%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	67.9	56.1	57.9	-1.7
Repeat Visitors (%)	30.1	NA	46.0	30.0	32.1	43.9	42.1	1.7

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	31.29	32.32	6.17	35.50	34.87	2.24	2.16	3.9%

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