



Europe Fact Sheet

Europe Overview

Operating as Hawai'i Tourism Europe (HTE), 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 May 2024 Quick Facts¹

Visitor Expenditures:	\$85.8 million
Primary Purpose of Stay:	Pleasure (24,976) vs. MCI (2,662)
Average Length of Stay:	13.18 days
First Time Visitors:	64.4%
Repeat Visitors:	35.6%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD May 2024P	YTD May 2023P	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	300.6	276.3	85.8	101.9	-15.8%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,255,308	1,233,293	402,174	427,134	-5.8%
Arrivals	137,908	21,550	18,775	114,041	93,727	91,695	30,506	32,223	-5.3%
Average Daily Census	4,877	810	863	4,364	3,439	3,370	2,646	2,829	-6.5%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	239.5	224.0	213.4	238.6	-10.6%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,207.0	3,012.8	2,813.2	3,162.2	-11.0%
Length of Stay (days)	12.91	13.76	16.77	13.97	13.39	13.45	13.18	13.26	-0.5%

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 2, 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 DIIO 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 five months of 2024, 30,506 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$85.8 million. There were 32,223 visitors (-5.3%) in the first five months of 2023 and visitor spending was \$101.9 million (-15.8%). In the first five months of pre-pandemic 2019, 46,035 visitors (-33.7%) arrived from this market and visitor spending was \$97.6 million (-12.1%).
- In 2023, there were 93,727 visitors from Europe, compared to 114,041 visitors (-17.8%) in 2022 and 137,908 visitors (-32.0%) in 2019.
- Visitors from Europe spent \$300.6 million in 2023, compared to \$306.0 million (-1.8%) in 2022 and \$268.1 million (+12.1%) in 2019. Daily visitor spending in 2023 was \$239 per person, higher than 2022 (\$192 per person, +24.6%) and 2019 (\$151 per person, +59.0%).

Market Conditions

- In May 2024, the Euro averaged 1.09 USD, showing a slight strengthening compared to April 2024. Meanwhile, the British Pound also strengthened slightly, now averaging 1.25 USD. The Swiss Franc remained stable at an average of 1.10 USD, consistent with April 2024.
- Germany's inflation rate is expected to reach +2.4 percent in May 2024, measured by the change in the consumer price index (CPI) compared to the same month a year earlier.
- Switzerland's inflation rate climbed to 1.4 percent in April 2024, accelerating from 1 percent in the previous month and exceeding market expectations of 1.1 percent. This marked the highest level since December 2023, primarily driven by significant price increases in food and non-alcoholic beverages.
- Germany remains a robust leader in supplying visitors to the USA, with 396,000 arrivals in the first quarter of 2024, surpassing the same period in 2023 by 24.4 percent and even exceeding pre-crisis levels in 2019 by 5 percent. Despite the distortion caused by early Easter vacations in 2024 compared to the previous year, Germany is expected to contribute nearly 2.1 million visitors in total this year, slightly more than in 2019. The German market continues its strong recovery trajectory, ranking second among overseas countries with 1.84 million arrivals, trailing only behind the UK.
- At IPW this year, Heinz Zimmermann, Chairman of Visit USA in Switzerland, noted that since 2015, 6 percent of the Swiss population has annually traveled to the USA, spending an average of \$296 per person per day during their vacations. This positions Switzerland as a leading contributor in terms of economic impact. With a low inflation rate of 1 percent (as of April 2024) and an unemployment rate of 2.3 percent, conditions are favorable for sustained travel intensity to the USA. Zimmermann anticipates that by the end of 2024, Swiss visitor numbers will only be around 10 percent lower than the record figures of 2019. With increased direct flights operated by Swiss and United Airlines, Zimmermann believes that reaching 2019 levels by 2025 is a realistic goal.
- In the UK, consumer spending priorities favor holidays and entertainment, though dining out faces economic pressures. Sustainability and a brand's environmental credentials are increasingly important to consumers, but convenience and cost remain paramount in the current economic climate, according to HSBC.

- HTE executed a tactical, multi-channel cooperative campaign with Condor as the primary partner to promote flights via the mainland US to the Hawaiian Islands. The campaign aims to enhance awareness of Hawai'i's diverse attractions and experiences among key audience segments, while also showcasing Condor's premium cabin experience. Utilizing targeted video on demand, Connected TV, video display, tactical retargeting, and paid social media, the campaign focuses on driving traffic and sales to Condor's website for travel to Hawai'i.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
O'ahu	102,148	15,411	11,843	82,748	71,013	23,555	23,244	1.3%
Maui County	61,575	8,535	6,129	47,654	32,726	9,291	13,058	-28.8%
Maui	60,596	8,315	5,967	46,788	31,976	9,122	12,860	-29.1%
Moloka'i	1,772	433	245	1,641	1,249	231	398	-42.0%
Lāna'i	1,630	253	221	1,247	938	154	328	-52.9%
Kaua'i	35,498	4,696	3,135	27,333	23,998	7,216	6,995	3.2%
Island of Hawai'i	43,608	6,634	4,539	39,477	31,076	9,679	9,633	0.5%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,472	1,685	2,125	-20.7%
True Independent (Net)	96,836	NA	16,198	83,739	69,157	22,942	23,396	-1.9%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	79,681	24,976	26,565	-6.0%
MCI (Net)	5,449	2,047	348	5,493	5,528	2,662	2,835	-6.1%
Convention/Conf.	2,938	829	156	2,697	3,077	1,273	1,052	21.1%
Corp. Meetings	974	372	140	1,202	1,221	509	736	-30.9%
Incentive	1,753	967	82	1,810	1,499	994	1,230	-19.1%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	67.9	64.4	65.2	-0.7
Repeat Visitors (%)	30.1	NA	46.0	30.0	32.1	35.6	34.8	0.7

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	31.29	NA	6.17	35.50	34.87	9.95	11.82	-15.8%

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