



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 June 2024 Quick Facts¹

Visitor Expenditures:	\$97.1 million
Primary Purpose of Stay:	Pleasure (29,234) vs. MCI (2,984)
Average Length of Stay:	13.20 days
First Time Visitors:	64.8%
Repeat Visitors:	35.2%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD June 2024P	YTD June 2023P	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	300.6	276.3	97.1	119.6	-18.9%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,255,308	1,233,293	470,556	498,953	-5.7%
Arrivals	137,908	21,550	18,775	114,041	93,727	91,695	35,637	37,611	-5.2%
Average Daily Census	4,877	810	863	4,364	3,439	3,370	2,585	2,757	-6.2%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	239.5	224.0	206.3	239.7	-14.0%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,207.0	3,012.8	2,723.7	3,180.2	-14.4%
Length of Stay (days)	12.91	13.76	16.77	13.97	13.39	13.45	13.20	13.27	-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).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism Europe: Katharina Dorr, Account Director
 Tel: 49 173 5614987
katharina@hawaiiouismeurope.com

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 half of 2024, 35,637 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$97.1 million. There were 37,611 visitors (-5.2%) in the first half of 2023 and visitor spending was \$119.6 million (-18.9%). In the first five months of pre-pandemic 2019, 54,975 visitors (-35.2%) arrived from this market and visitor spending was \$117.7 million (-17.6%).
- 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 June 2024, the average exchange rate for 1 Euro was 1.07 USD, which was a slight depreciation compared to May 2024. The British Pound strengthened slightly, averaging 1.27 US Dollars. The CHF/USD exchange rate averaged 1.13 USD, also a slight strengthening compared to May 2024.
- UK inflation dropped to its lowest level in three years in June 2024, with price increases at 2 percent compared to 2.3 percent in May 2024. UK interest rates remain unchanged at 5.25 percent. In Switzerland, inflation maintained its highest level of 2024, raising speculation about potential interest rate cuts by the Swiss National Bank (SNB).
- In June 2024, the USA continued to be the most popular outbound travel destination for the UK, with Florida, New York, and California being favored destinations. The Caribbean is increasingly emphasizing farm-to-table dining and eating local to reduce food imports, addressing cost and environmental concerns.
- According to a recent YouGov survey, three-quarters of UK consumers planning to travel in the next 12 months intend to holiday domestically, while two-thirds plan to take international holidays. City breaks are the most popular option at 48 percent, followed by sightseeing holidays, beach vacations, visiting friends and relatives (VFR), and cultural and historical trips.
- In June 2024, Germans have not shown an improved buying mood, as reported by Nuremberg-based institutes GfK and NIM. Their study on Germany's consumer climate indicates a pause in the recovery of consumer sentiment. Expectations regarding income and economic growth have been tempered, leading to a slight decrease in the willingness to make major purchases compared to the previous month.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	102,148	15,411	11,843	82,748	71,013	27,515	27,127	1.4%
Maui County	61,575	8,535	6,129	47,654	32,726	10,983	15,408	-28.7%
Maui	60,596	8,315	5,967	46,788	31,976	10,798	15,183	-28.9%
Moloka'i	1,772	433	245	1,641	1,249	262	480	-45.4%
Lāna'i	1,630	253	221	1,247	938	172	390	-55.9%
Kaua'i	35,498	4,696	3,135	27,333	23,998	8,479	8,395	1.0%
Island of Hawai'i	43,608	6,634	4,539	39,477	31,076	11,226	11,342	-1.0%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,472	1,923	2,329	-17.4%
True Independent (Net)	96,836	NA	16,198	83,739	69,157	26,723	27,274	-2.0%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	79,681	29,234	31,198	-6.3%
MCI (Net)	5,449	2,047	348	5,493	5,528	2,984	3,013	-1.0%
Convention/Conf.	2,938	829	156	2,697	3,077	1,462	1,131	29.2%
Corp. Meetings	974	372	140	1,202	1,221	550	793	-30.7%
Incentive	1,753	967	82	1,810	1,499	1,097	1,281	-14.4%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	67.9	64.8	65.7	-0.9
Repeat Visitors (%)	30.1	NA	46.0	30.0	32.1	35.2	34.3	0.9

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	31.29	NA	6.17	35.50	34.87	11.26	13.87	-18.9%

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