



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 July 2024 Quick Facts¹

Visitor Expenditures:	\$132.9 million
Primary Purpose of Stay:	Pleasure (38,368) vs. MCI (3,193)
Average Length of Stay:	13.31 days
First Time Visitors:	65.3%
Repeat Visitors:	34.7%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD July 2024P	YTD July 2023	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	369.0	276.3	132.9	202.4	-34.3%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,233,293	610,619	807,578	-24.4%
Arrivals	137,908	21,550	18,775	114,041	117,241	91,695	45,865	62,751	-26.9%
Average Daily Census	4,877	810	863	4,364	4,156	3,370	2,867	3,809	-24.7%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	243.2	224.0	217.7	250.6	-13.1%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,147.0	3,012.8	2,898.1	3,225.2	-10.1%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.45	13.31	12.87	3.4%

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 2, 2024).

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¹ 2024 visitor data are preliminary. 2019 - 2023 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 seven months of 2024, 45,865 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$132.9 million. There were 62,751 visitors (-26.9%) in the first seven months of 2023 and visitor spending was \$202.4 million (-34.3%). In the first seven months of pre-pandemic 2019, 71,034 visitors (-35.4%) arrived from this market and visitor spending was \$149.9 million (-11.3%).
- In 2023, there were 117,241 visitors from Europe, compared to 114,041 visitors (+2.8%) in 2022 and 137,908 visitors (-15.0%) in 2019.
- Visitors from Europe spent \$369.0 million in 2023, compared to \$306.0 million (+20.6%) in 2022 and \$268.1 million (+37.6%) in 2019. Daily visitor spending in 2023 was \$243 per person, higher than 2022 (\$192 per person, +26.6%) and 2019 (\$151 per person, +61.5%).

Market Conditions

- In July 2024, the Euro averaged 1.08 USD, showing a slight appreciation from June. The British Pound strengthened to an average of 1.29 USD. The Swiss Franc (CHF) averaged 1.14 USD, also reflecting a slight increase compared to June.
- The Swiss economic outlook is positive. Zurich's Economic Barometer rose to 102.7 points in June 2024, up 0.5 points from the previous month and above the long-term average. This improvement is attributed to a favorable international business environment, potentially benefiting sectors such as Swiss hospitality.
- Following the UK General Election, a new Labour Government achieved a decisive victory. While consumer sentiment remains stable, the implications for the UK economy are yet to be fully understood.
- The USA remains the top outbound travel destination for the UK, with Florida, New York, and California as popular choices. Shoulder season travel in the UK is increasing, with more Britons planning earlier summer vacations and breaks outside the peak summer months. BA Holidays reported a doubling in searches for May and June travel compared to July and August.
- Travel trends from Germany in July 2024 indicate a significant rise in international travel, particularly for major sporting events. Popular destinations include Paris, Miami, and New York City, which are hosting events such as the Olympics, Formula 1, and the US Open Tennis.
- Germans are increasingly pursuing "affordable luxury" travel experiences, opting for budget-friendly yet elevated accommodations and unique adventures. This trend includes paying for upgrades and choosing boutique hotels.
- In July 2024, Swiss travelers showed a strong preference for local and easily accessible international destinations, focusing on outdoor activities, wellness, and short trips.
- Swiss interest in long-haul travel is growing, with popular destinations including the United States, Southeast Asia, and the Caribbean. The US, especially cities like New York, San Francisco, and Miami, is increasingly favored. Hawai'i is also seeing a rise in Swiss visitors seeking unique tropical experiences and outdoor adventures.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	35,515	48,327	-26.5%
Maui County	61,575	8,535	6,129	47,654	39,712	14,877	25,230	-41.0%
Maui	60,596	8,315	5,967	46,788	38,675	14,673	24,884	-41.0%
Moloka'i	1,772	433	245	1,641	1,164	333	552	-39.8%
Lāna'i	1,630	253	221	1,247	1,846	200	907	-77.9%
Kaua'i	35,498	4,696	3,135	27,333	28,113	11,374	13,619	-16.5%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	14,788	18,541	-20.2%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,888	2,184	2,656	-17.8%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	34,316	46,927	-26.9%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	38,368	53,631	-28.5%
MCI (Net)	5,449	2,047	348	5,493	6,102	3,193	4,234	-24.6%
Convention/Conf.	2,938	829	156	2,697	3,438	1,605	2,167	-26.0%
Corp. Meetings	974	372	140	1,202	1,289	593	897	-33.9%
Incentive	1,753	967	82	1,810	1,645	1,131	1,381	-18.1%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	65.3	66.8	-1.6
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	34.7	33.2	1.6

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
State tax revenue generated (\$ Millions) ^{2f}	31.29	NA	6.17	35.50	42.80	15.42	23.48	-34.3%

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