



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 October 2024 Quick Facts^{1/}

Visitor Expenditures:	\$227.1 million
Primary Purpose of Stay:	Pleasure (67,303) vs. MCI (4,650)
Average Length of Stay:	13.05 days
First Time Visitors:	67.9%
Repeat Visitors:	32.1%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Oct. 2024P ^{1/}	YTD Oct. 2023	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	369.0	261.9	227.1	322.2	-29.5%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,150,933	1,039,439	1,320,452	-21.3%
Arrivals	137,908	21,550	18,775	114,041	117,241	85,571	79,633	102,403	-22.2%
Average Daily Census	4,877	810	863	4,364	4,156	3,145	3,408	4,344	-21.5%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	243.2	227.5	218.5	244.0	-10.5%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,147.0	3,060.2	2,851.4	3,146.6	-9.4%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.45	13.05	12.89	1.2%

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.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2024 annual forecast (Quarter 3, 2024).

Contact Information

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

Hawai'i Tourism Europe: Andreas Schunck, Account Director
 Tel: 49 173 5614987
andreas@hawaiiitourismeurope.com

^{1/} 2024P visitor data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office (NTTO). 2019 – 2023 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the NTTO and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first 10 months of 2024, 79,633 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$227.1 million. It should be noted that 2024 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office. There were 102,403 visitors in the first 10 months of 2023 and visitor spending was \$322.2 million. In the first 10 months of pre-pandemic 2019, 118,559 visitors arrived from this market and visitor spending was \$238.7 million.
- 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 September 2024, the British Pound slightly weakened to 1.29 US Dollars. UK inflation remained steady at 2.2 percent, matching the Bank of England's expectations, with interest rates at 5 percent. In October 2024, the Euro to US Dollar exchange rate averaged about 1.10 USD and the Swiss Franc to US Dollar exchange rate averaged 1.16 USD, allowing travelers to enjoy greater purchasing power in the U.S.
- In the UK, economic growth for 2024 has exceeded expectations at 1.3 percent, while inflation is at 1.7 percent. The new Labour Government presented its first budget on October 30th, 2024, with anticipated tax increases, changes to pensions, and adjustments in public service spending.
- Germany's economic outlook in October 2024 remained subdued, with major institutions revising their forecasts downward. The International Monetary Fund (IMF) now projects a 0.2 percent contraction in Germany's GDP for 2024, a change from their previous expectations of moderate growth.
- In Switzerland, the IMF maintains its GDP growth projection at 1.1 percent for the year. In October 2024, Switzerland's consumer confidence indicator remained steady at -33.7 points, unchanged from September.
- At Brand USA Travel Week in London, strong European demand for U.S. travel was evident. UK arrivals to the USA increased by 4.3 percent to nearly three million, but remain 16.7 percent below 2019 levels. Germany experienced a more significant increase of 10 percent, reaching 1.5 million arrivals and only 3.4 percent below pre-pandemic numbers, with potential for further growth in autumn. In contrast, France is 9.1 percent below 2019 levels, and Western Europe overall is down 11.2 percent due to the UK's slow recovery. Italy has fully rebounded, surpassing 2019 levels with 841,000 arrivals, a 1.4 percent increase.
- British Airways is either scrapping or delaying certain long-haul services due to a shortage of parts for its Rolls Royce engines used in Boeing 787 aircraft. As a consequence, the Kuala Lumpur route has been postponed until 2025, and some London-New York flights have been temporarily cancelled.
- American Airlines has announced plans to expand its European network from Miami International Airport. This includes a new route from Miami to Rome starting in the summer of 2025, which will improve connectivity between the two cities. The airline also intends to increase

seat capacity on its Miami to London Heathrow route to accommodate the strong demand for transatlantic travel.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P ¹	YTD Oct. 2023	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	61,378	80,573	-23.8%
Maui County	61,575	8,535	6,129	47,654	39,712	26,468	35,686	-25.8%
Maui	60,596	8,315	5,967	46,788	38,675	26,183	34,836	-24.8%
Moloka'i	1,772	433	245	1,641	1,164	527	1,015	-48.0%
Lāna'i	1,630	253	221	1,247	1,846	373	1,466	-74.6%
Kaua'i	35,498	4,696	3,135	27,333	28,113	19,500	24,640	-20.9%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	26,093	32,453	-19.6%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Oct. 2024P ¹	YTD Oct. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,888	3,361	4,272	-21.3%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	59,631	75,973	-21.5%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	67,303	88,474	-23.9%
MCI (Net)	5,449	2,047	348	5,493	6,102	4,650	5,329	-12.7%
Convention/Conf.	2,938	829	156	2,697	3,438	2,832	2,829	0.1%
Corp. Meetings	974	372	140	1,202	1,289	737	1,172	-37.1%
Incentive	1,753	967	82	1,810	1,645	1,236	1,577	-21.7%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Oct. 2024P ¹	YTD Oct. 2023	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	67.9	69.1	-1.2
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	32.1	30.9	1.2

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Oct. 2024P ¹	YTD Oct. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	31.29	NA	6.17	35.50	42.80	26.34	37.38	-29.5%

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