



# 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 December 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$257.7 million
Primary Purpose of Stay:	Pleasure (76,842) vs. MCI (5,232)
Average Length of Stay:	13.11 days
First Time Visitors:	67.1%
Repeat Visitors:	32.9%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Dec. 2024P <sup>1/</sup>	YTD Dec. 2023	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	369.0	273.7	257.7	369.0	-30.2%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,250,378	1,194,789	1,517,015	-21.2%
Arrivals	137,908	21,550	18,775	114,041	117,241	95,461	91,110	117,241	-22.3%
Average Daily Census	4,877	810	863	4,364	4,156	3,416	3,264	4,156	-21.5%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	243.2	218.9	215.7	243.2	-11.3%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,147.0	2,867.3	2,828.2	3,147.0	-10.1%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.10	13.11	12.94	1.3%

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 4, 2024).

## Contact Information

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<sup>1</sup> 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

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- In calendar year 2024, 91,110 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland), total visitor spending was \$257.7 million and daily spending was \$216 per person. 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 117,241 visitors in 2023 and total visitor spending was \$369.0 million and daily spending was \$243 per person. In pre-pandemic 2019, 137,908 visitors arrived from this market and total visitor spending was \$268.1 million and daily spending was \$151 per person.
- 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

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- The British Pound has gained slightly against the US Dollar, reaching 1.27 USD to the Pound. The highest USD/EUR exchange rate in 2024 occurred on December 18, with 0.9657 Euros per US Dollar. Meanwhile, the CHF/USD rate has risen by 0.7 percent since December 18, 2024, indicating an increase in the value of the Swiss Franc relative to the US Dollar.
- The latest ONS data reveals that UK's net debt in November 2024 stood at 98.1 percent of GDP, 1.1 percent below the forecast but 1.2 percent higher than the previous year. Rising government borrowing and debt may affect the outbound travel industry through reduced consumer confidence, higher inflation, cuts to travel infrastructure spending, and potential tax increases to reduce debt.
- Germany's real GDP is expected to decline by 0.2 percent in 2024, with a modest recovery of 0.2 percent growth in 2025, followed by 0.8 percent in 2026 and 0.9 percent in 2027. This marks a downward revision compared to the June 2024 forecast.
- The Swiss government has revised its growth forecast, predicting the economy will expand by 1.5 percent in 2025, slightly lower than previous expectations for one of Europe's most resilient economies. For 2024, the economy is projected to grow by 0.9 percent.
- The outbound travel market for German and Swiss travelers to the US has experienced significant growth in 2024. The German outbound tourism market is expected to increase from around \$114.96 billion in 2024 to \$292.80 billion by 2034, reflecting a compound annual growth rate (CAGR) of 9.8 percent.
- DERTOUR Germany anticipates a record year in 2025, projecting a 21 percent increase in guests and a 33 percent rise in turnover in 2024. This growth is fueled by the resurgence of long-haul travel, a rise in high-quality bookings, and a 61 percent share of all-inclusive holidays. Additionally, the average travel duration for main holidays has increased from 8.5 to 10 days. The company remains optimistic about continued strong growth for both the winter and summer seasons.
- Google Search Trends reveal a mix of traditional European destinations and growing interest in long-haul travel:
  - Germany: Popular sun-and-beach destinations like Portugal and Morocco lead, followed by long-haul spots such as Japan, Singapore, Vietnam, and Sri Lanka. China and South Korea also attract attention.
  - UK: Spain, France, and the USA are top destinations, with increasing interest in long-haul travel to Greece, Italy, and Australia.
  - Switzerland: Swiss travelers frequently search for destinations like Italy, France, and Spain, as well as tropical locations like the Maldives and long-haul destinations such as the USA and Thailand.

## Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P <sup>1</sup>	YTD Dec. 2023	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	70,121	92,772	-24.4%
Maui County	61,575	8,535	6,129	47,654	39,712	30,461	39,712	-23.3%
Maui	60,596	8,315	5,967	46,788	38,675	30,130	38,675	-22.1%
Moloka'i	1,772	433	245	1,641	1,164	607	1,164	-47.8%
Lāna'i	1,630	253	221	1,247	1,846	428	1,846	-76.8%
Kaua'i	35,498	4,696	3,135	27,333	28,113	22,144	28,113	-21.2%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	29,624	36,665	-19.2%

## Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Dec. 2024P <sup>1</sup>	YTD Dec. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,888	3,816	4,888	-21.9%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	68,658	87,815	-21.8%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	76,842	100,817	-23.8%
MCI (Net)	5,449	2,047	348	5,493	6,102	5,232	6,102	-14.3%
Convention/Conf.	2,938	829	156	2,697	3,438	3,281	3,438	-4.6%
Corp. Meetings	974	372	140	1,202	1,289	825	1,289	-36.0%
Incentive	1,753	967	82	1,810	1,645	1,297	1,645	-21.1%

## First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Dec. 2024P <sup>1</sup>	YTD Dec. 2023	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	67.1	68.4	-1.4
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	32.9	31.6	1.4

## Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Dec. 2024P <sup>1</sup>	YTD Dec. 2023	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	31.29	NA	6.17	35.50	42.80	29.89	42.80	-30.2%

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