



Europe Fact Sheet

Europe Overview

Hawai'i Tourism Europe (HTE) targets visitors from the countries of United Kingdom and Germany, which are the top two source markets in the Europe major market area. Europe visitors have the longest average length of stay of all visitors to Hawai'i.

Hawai'i continues to be represented in Europe with offices in London and Munich. Highlighted 2020 HTE activities include: 1) in-house and online travel trade training programs; 2) Hawai'i specialist incentive familiarization trips (FAMs); and 3) individual and group press trips.

Year-to-Date December 2019 Quick Facts¹

Visitor Expenditures:	\$274.1 million
Primary Purpose of Stay:	Pleasure (121,983) vs. MCI (5,353)
Average Length of Stay:	12.92 days
First Time Visitors:	70.6%
Repeat Visitors:	29.4%

EUROPE MMA (by Air)	2018	2017R	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Visitor Expenditures* (\$ Millions)	326.3	309.8	5.3%	301.1	-7.7%	274.1	326.3	-16.0%
Visitor Days	1,902,379	1,863,021	2.1%	1,804,652	-5.1%	1,789,549	1,902,379	-5.9%
Arrivals	144,953	142,665	1.6%	136,941	-5.5%	138,550	144,953	-4.4%
Per Person Per Day Spending* (\$)	171.5	166.3	3.2%	166.8	-2.7%	153.2	171.5	-10.7%
Per Person Per Trip Spending* (\$)	2,251.2	2,171.5	3.7%	2,198.4	-2.3%	1,978.6	2,251.2	-12.1%
Length of Stay (days)	13.12	13.06	0.5%	13.18	0.4%	12.92	13.12	-1.6%

*Excludes supplemental business spending

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¹ 2019 visitor data are preliminary. January – June 2019 data were updated with immigration statistics from the National Travel and Tourism Office (NTTO). 2018 and 2017R visitor data are the final numbers and reflect updated immigration statistics from NTTO; updated airfare statistics from DIO Mi Airline database, and final passenger counts for Airline reports.

Market Summary

- In 2018, growth in arrivals (+1.6% to 144,953 visitors) and higher daily spending (+3.2% to \$172 per person) led to a 5.3 percent increase in visitor expenditures to \$326.3 million. Arrivals for MCI purposes grew (+1.7% to 8,534 visitors) compared to 2017. Island arrival distribution showed that 741.1 percent went to O'ahu, 42.9 percent to Maui, 33.7 percent to the island of Hawai'i, and 25.5 percent to Kaua'i.
- In 2019, decreased arrivals (-4.4% to 138,550 visitors) and lower daily spending (-10.7% to \$153 per person) resulted in a 16.0 percent drop in visitor expenditures to \$274.1 million. Arrivals for MCI purposes (-34.7% to 5,353 visitors) declined compared to the same period last year. Island distribution in 2019 showed that 74.3 percent went to O'ahu, 43.9 percent to Maui, 31.6 percent to the island of Hawai'i, and 26.0 percent to Kaua'i.

Market Conditions

- The general election in the UK has established political stability across Europe following a period of uncertainty. The situation has also lead to a stronger Pound and Euro over the end of 2019. The Pound Sterling has continued to rise over December to \$1.31, whilst the Euro increased to \$1.12, as did the Swiss Franc, which rose to \$1.03.
- UK GDP grew by 0.3 percent during the third quarter. Unemployment rates are low at 3.8 percent in the UK.
- The US National Travel and Tourism Office predicts UK travel to the USA will grow over the next five years with over five million visitors expected in 2021, up from 4.7 million visitors in 2018 and 4.48 million in 2017.
- ABTA research has revealed that package holidays are still dominating the UK outbound tourism market. Since 2014, half of all holidays taken by UK travelers annually have been package holidays and this figure is staying steady.
- Overall, the German economy remains stable. Focus Economics Consensus Forecast panelists expect the German economy to increase 1.4 percent in 2020. The unemployment rate remains consistent at 3.2 percent. At the close of the year, business confidence rose in Germany from a revised 95.1 percent in November to 96.3 percent in December.
- According to the FVW destination rankings, the USA continues to be the largest single-haul destination for German travelers with about two million German visitors in each of the last three years.
- The last quarter has seen the European market continue on relatively strongly, despite economic circumstances like Brexit. Combined with consumers' willingness to carry on spending and taking on holidays, despite economic uncertainty, points to travel between Europe and Hawai'i continuing on well in the long-term, despite a short-term decline.
- Strong peak sales have been predicted as the general election presents clarity on the political climate and Brexit, as well as the return of Thomas Cook customers to the market.

Distribution by Island

EUROPE MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	107,384	103,528	3.7%	102,887	107,384	-4.2%
Maui County	62,970	62,747	0.4%	61,746	62,970	-1.9%
Maui	62,194	61,649	0.9%	60,756	62,194	-2.3%
Moloka'i	2,833	2,207	28.4%	1,771	2,833	-37.5%
Lāna'i	1,470	1,342	9.5%	1,620	1,470	10.2%
Kaua'i	37,015	34,203	8.2%	36,044	37,015	-2.6%
Island of Hawai'i	48,899	53,199	-8.1%	43,753	48,899	-10.5%

Group vs. True Independent; Leisure vs. Business

EUROPE MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	7,422	6,862	8.2%	7,020	7,422	-5.4%
True Independent (Net)	98,536	96,533	2.1%	97,374	98,536	-1.2%
Leisure vs business						
Pleasure (Net)	125,783	122,982	2.3%	121,983	124,157	-1.8%
MCI (Net)	8,534	8,390	1.7%	5,353	8,195	-34.7%
Convention/Conf.	6,064	5,922	2.4%	2,966	5,791	-48.8%
Corp. Meetings	1,501	1,511	-0.7%	974	895	8.8%
Incentive	1,190	1,178	1.0%	1,628	1,704	-4.4%

First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	69.5	71.4	-2.0	70.6	69.5	1.1
Repeaters (%)	30.5	28.6	2.0	29.4	30.5	-1.1

Tax Revenue

EUROPE MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	38.09	36.16	5.3%	32.00	38.09	-16.0%

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