



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 August 2024 Quick Facts¹

Visitor Expenditures:	\$168.4 million
Primary Purpose of Stay:	Pleasure (50,863) vs. MCI (3,675)
Average Length of Stay:	13.15 days
First Time Visitors:	66.9%
Repeat Visitors:	33.1%

EUROPE MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Aug. 2024P	YTD Aug. 2023	% Change
Visitor Expenditures* (\$ Millions)	268.1	NA	52.9	306.0	369.0	261.9	168.4	247.7	-32.0%
Visitor Days	1,780,190	296,487	314,899	1,592,705	1,517,015	1,150,933	786,230	1,020,834	-23.0%
Arrivals	137,908	21,550	18,775	114,041	117,241	85,571	59,810	79,232	-24.5%
Average Daily Census	4,877	810	863	4,364	4,156	3,145	3,222	4,201	-23.3%
Per Person Per Day Spending* (\$)	150.6	NA	167.9	192.1	243.2	227.5	214.2	242.6	-11.7%
Per Person Per Trip Spending* (\$)	1,943.9	NA	2,815.3	2,683.4	3,147.0	3,060.2	2,815.5	3,126.0	-9.9%
Length of Stay (days)	12.91	13.76	16.77	13.97	12.94	13.45	13.15	12.88	2.0%

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 3, 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 eight months of 2024, 59,810 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$168.4 million. There were 79,232 visitors (-24.5%) in the first eight months of 2023 and visitor spending was \$247.7 million (-32.0%). In the first eight months of pre-pandemic 2019, 89,559 visitors (-33.2%) arrived from this market and visitor spending was \$184.4 million (-8.7%).
- 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 August 2024, the British Pound remained stable against the US Dollar at 1.29 USD per Pound. The Euro averaged 1.09 USD, showing a slight increase from July 2024. The CHF/USD exchange rate averaged 1.15 USD, indicating a modest strengthening compared to the previous month.
- According to Globetrender, Global Data forecasts that UK departures will reach 86.9 million by 2024, surpassing the 84.7 million recorded in 2019, despite the economic downturn in Europe. This marks a shift from the "fly less, stay longer" trend of 2021. BA Holidays reports that the most searched package holiday destinations for UK consumers in 2024 include New York, Orlando, Dubai, Barbados, Cancun, Maldives, Las Vegas, Tenerife, Dominican Republic, and St Lucia.
- As of August 2024, outbound travel from Germany continues to show significant growth, with international departures rebounding strongly. Euromonitor International projects that approximately 122 million Germans will travel abroad in 2024, surpassing the pre-pandemic high of 116.1 million in 2019.
- Audley Travel reports that discerning UK travelers are increasingly seeking alternative, less-crowded experiences, elevating less-visited but equally appealing destinations on their travel wish lists.
- TUI indicates that autumn 2024 is set to be the strongest season ever for autumn travel. Germans are showing high demand for Mediterranean destinations such as Turkey, Spain, Greece, and Egypt. Long-haul travel trends also reveal strong interest in destinations including the USA, UAE, Thailand, Maldives, and Mauritius.
- A notable shift towards sustainable travel is emerging among German and Swiss travelers, with many opting for eco-friendly accommodations and transport options. This trend underscores a growing commitment to environmental responsibility as travel demand rebounds, with German-speaking travelers increasingly prioritizing sustainability.
- Swiss travelers are increasingly exploring international destinations, fueled by the strong Swiss franc. There is notable interest in long-haul travel to the United States, Japan, and Australia, alongside traditional favorites such as France, Italy, and Spain.

Distribution by Island

Europe MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	102,148	15,411	11,843	82,748	92,772	46,585	62,079	-25.0%
Maui County	61,575	8,535	6,129	47,654	39,712	19,874	29,483	-32.6%
Maui	60,596	8,315	5,967	46,788	38,675	19,648	28,991	-32.2%
Moloka'i	1,772	433	245	1,641	1,164	397	707	-43.9%
Lāna'i	1,630	253	221	1,247	1,846	267	1,083	-75.3%
Kaua'i	35,498	4,696	3,135	27,333	28,113	14,710	18,309	-19.7%
Island of Hawai'i	43,608	6,634	4,539	39,477	36,665	18,747	24,016	-21.9%

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,146	NA	521	4,892	4,888	2,603	3,117	-16.5%
True Independent (Net)	96,836	NA	16,198	83,739	87,815	44,781	58,903	-24.0%
Leisure vs Business								
Pleasure (Net)	121,207	17,442	14,071	97,416	100,817	50,863	68,776	-26.0%
MCI (Net)	5,449	2,047	348	5,493	6,102	3,675	4,417	-16.8%
Convention/Conf.	2,938	829	156	2,697	3,438	2,039	2,292	-11.1%
Corp. Meetings	974	372	140	1,202	1,289	618	932	-33.7%
Incentive	1,753	967	82	1,810	1,645	1,154	1,406	-17.9%

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	69.9	NA	54.0	70.0	68.4	66.9	68.8	-1.8
Repeat Visitors (%)	30.1	NA	46.0	30.0	31.6	33.1	31.2	1.8

Tax Revenue

Europe MMA (by Air)	2019	2020*	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
State tax revenue generated (\$ Millions) ^{2f}	31.29	NA	6.17	35.50	42.80	19.53	28.73	-32.0%

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