



Europe Fact Sheet

Europe Overview

Hawai'i Tourism Europe (HTE) targets visitors from the countries of United Kingdom, Germany, France, Italy and Switzerland (Europe Major Market Area, MMA). The U.K. and Germany are the two top source markets in the Europe MMA.

Hawai'i continues to be represented in Europe with offices in London, Munich and Paris. Highlighted 2017 HTE activities includes: 1) launch of a new online training program; 2) a multi-faceted consumer campaign, "Hawai'i through the Lens," encompassing social media, VP, print and online advertising; 3) travel trade incentives campaign centered around the Top 40 things to do in the Hawaiian Islands; 4) Aloha Europe sales mission; and 5) first-ever MCI FAM.

2017 Quick Facts¹

Visitor Expenditures:	\$290.3 million
Primary Purpose of Stay:	Pleasure (122,964) vs. MCI (8,185)
Average Length of Stay:	13.10 days
First Time Visitors:	71.2%
Repeat Visitors:	28.8%

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
Visitor Expenditures* (\$ Millions)	337.2	353.4	4.8%	331.1	-6.3%	290.3	353.4	-17.9%
Visitor Days	1,897,157	1,860,887	-1.9%	1,867,300	0.3%	1,830,610	1,860,887	-1.6%
Arrivals	145,019	143,922	-0.8%	140,377	-2.5%	139,780	143,922	-2.9%
Per Person Per Day Spending* (\$)	177.7	189.9	6.9%	177.3	-6.6%	158.6	189.9	-16.5%
Per Person Per Trip Spending* (\$)	2,325.0	2,455.6	5.6%	2,358.4	-4.0%	2,077.0	2,455.6	-15.4%
Length of Stay (days)	13.08	12.93	-1.2%	13.30	2.9%	13.10	12.93	1.3%

*Excludes supplemental business spending

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Market Summary

- In 2017, arrivals decreased 2.9% to 139,780 visitors. Lower daily spending (-16.5% to \$159 per person) also contributed to a 17.9% drop in visitor expenditures to \$290.3 million. Arrivals for MCI purposes rose 1.2 percent compared to 2016 to 8,185 visitors. Looking at island distribution in 2017, 73% went to O'ahu, 43% to Maui, 37% to Island of Hawai'i and 24% to Kaua'i.
- In 2016, arrivals dropped slightly (-0.8%) to 143,922 visitors and visitor days decrease 1.9% from 2015. Higher daily spending (+6.9% to \$190 per person) contributed to a 4.8 percent increase in visitor expenditures to \$353.4 million. MCI visitors decreased 12.5% to 8,086 visitors. Seventy-two percent of Europeans visited O'ahu, followed by Maui (45.4%), Island of Hawai'i (33.7%) and Kaua'i (22.1%).

Market Conditions

- Britain's dominant services sector grew unexpectedly quickly last month and businesses are more upbeat about 2018 than they were for much of 2017
- Over the past year, ABTA research shows that more British holidaymakers have taken more holidays than at any point in the last five years
- Germany's economy should continue to grow solidly into the New Year due to a strong labour market and low interest rates that are boosting the private sector economy. Household spending is also expected to benefit from the strengthening labour market
- A weaker franc, and a strengthening global economy, are expected to drive export-driven growth in 2018, while upbeat economic sentiment should prompt improved business investment
- 2017 has seen a savvier breed of holidaymakers; with people responding to challenging market conditions by planning further ahead to get the holiday they want, and by managing their holiday budgets more carefully.
- As 2017 draws to a close, early bookings for overseas holidays also appear strong for 2018, with industry figures showing bookings for next summer tracking 5% above last year
- Package holidays remain the single most popular booking option for foreign holidays, with over half (51%) of people taking one in the past 12 months
- Looking ahead, the German 2017/18 winter season has made a solid start with a 2% rise in cumulated sales as of end-October, according to GfK figures
- According to the tour operator Voyageurs du Monde, Hawai'i is among the 8 top destinations for 2018

Visitor Statistics

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*Excludes supplemental business spending

Distribution by Island

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
O'ahu	105,998	103,118	-2.7%	102,017	103,118	-1.1%
Mauai County	61,005	65,293	7.0%	61,148	65,293	-6.3%
...Mauai	60,361	64,502	6.9%	60,181	64,502	-6.7%
...Moloka'i	2,445	1,993	-18.5%	2,075	1,993	4.1%
...Lāna'i	1,492	1,584	6.2%	1,315	1,584	-17.0%
Kaua'i	33,406	31,772	-4.9%	33,444	31,772	5.3%
Hawai'i Island	49,755	48,481	-2.6%	52,313	48,481	7.9%

Group vs. FIT; Leisure vs. Business

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
Group vs FIT						
Group tour	8,399	8,943	6.5%	6,675	8,943	-25.4%
True Independent	94,079	93,533	-0.6%	95,186	93,533	1.8%
Leisure vs business						
Pleasure (Net)	126,397	124,394	-1.6%	122,964	124,394	-1.1%
MCI (Net)	9,246	8,086	-12.5%	8,185	8,086	1.2%
Convention/Conf.	6,369	4,740	-25.6%	5,819	4,740	22.8%
Corp. Meetings	1,296	1,317	1.6%	1,408	1,317	7.0%
Incentive	1,834	2,381	29.8%	1,178	2,381	-50.5%

First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
1st timers (%)	68.9	70.8	-1.9	71.2	70.8	0.4
Repeaters (%)	31.1	29.2	1.9	28.8	29.2	-0.4

Tax Revenue

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
State tax revenue generated* (\$ Millions)	38.10	41.25	8.3%	33.89	41.25	-17.9%

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

Industry

Major Tour Operators

Below are the current top tour operators in Germany and the United Kingdom in relation to market share. This is based on total numbers of passengers to Hawai'i.

Germany

- FIT Touristik*
- Canusa Touristik*
- Fairflight Touristik*
- Dertour
- Meier's Weltreisen
- TUI AG
- Thomas Cook AG
- Explorer Fernreisen
- America Unlimited
- CRD International
- Hawaii.de
- Boomerang Reisen

United Kingdom*

- Virgin Holidays
- Trailfinders
- Hayes and Jarvis
- STA
- Dnata (Gold Medal/Travelbag/Netflights)
- Flight Centre
- BA Holidays
- Expedia
- Tropical Sky
- US Airtours/Travelplanners

* These are the key tour operators who send UK visitors to Hawai'i as a stand-alone destination. This does not take into account multi-center add-ons to the West Coast.

* FIT, Canusa, and Fairlight are the only tour operators with their own dedicated Hawai'i brochure.