



## 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 2018 HTE activities includes: 1) Promotions with Brand USA in the UK and Lonely Planet in Germany; 2) a multi-faceted consumer campaign, "Experience Our Hawai'i," encompassing social media and online advertising; 3) Aloha Europe sales mission in October; and 4) participation in IMEX Germany.

### Year-to-Date February 2018 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$38.2 million
Primary Purpose of Stay:	Pleasure (14,258) vs. MCI (1,243)
Average Length of Stay:	13.57 days
First Time Visitors:	57.5%
Repeat Visitors:	42.5%

	2016	2017P	% Change 2017P vs 2016	2018 Forecast (Feb. 2018)	% Change 2017P vs 2018 Forecast	YTD Feb. 2018P	YTD Feb. 2017P	% change YTD
EUROPE MMA (by Air)								
Visitor Expenditures* (\$ Millions)	353.4	290.3	-17.9%	308.7	6.3%	38.2	41.6	-8.2%
Visitor Days	1,860,887	1,830,610	-1.6%	1,838,578	0.4%	225,962	216,825	4.2%
Arrivals	143,922	139,780	-2.9%	139,780	0.0%	16,648	15,769	5.6%
Per Person Per Day Spending* (\$)	189.9	158.6	-16.5%	167.9	5.9%	168.9	191.7	-11.9%
Per Person Per Trip Spending* (\$)	2,455.6	2,077.0	-15.4%	2,208.7	6.3%	2,291.9	2,635.7	-13.0%
Length of Stay (days)	12.93	13.10	1.3%	13.15	0.4%	13.57	13.75	-1.3%

\*Excludes supplemental business spending

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## **Market Summary**

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- In 2017, arrivals decreased 2.9 percent to 139,780 visitors. Lower daily spending (-16.5% to \$159 per person) also contributed to a 17.9 percent 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 percent went to O'ahu, 43 percent to Maui, 37 percent to Island of Hawai'i and 24 percent to Kaua'i.
- Through the first two months of 2018, arrivals increased 5.6 percent to 16,648 visitors. However, lower daily spending (-11.9% to \$169 per person) resulted in an 8.2 percent decline in visitor expenditures to \$38.2 million. Arrivals for MCI purposes increased (+3.2% to 1,243 visitors) compared to year-to-date February 2017. Island distribution through February 2018 showed that 73 percent went to O'ahu, 36 percent to Island of Hawai'i, 33 percent to Maui, and 19 percent to Kaua'i.

## **Market Conditions**

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- The National Institute of Economic and Social Research (NIESR) said the strength of the world economy and the benefit for British exporters from the weak pound would help increase GDP growth by almost 2% this year and next. The NIESR's expectation of GDP growing by 1.9% this year and in 2019 is a rise from the previous estimate of 1.7% for both years.
- ABTA research shows a notable increase in people planning to spend more on their holidays in the next 12 months. Over three in ten people (31%) plan to spend more, compared to 24% who stated this in 2016.
- German analysts see GDP growth at 2.3% in 2018, up 0.1 percentage points from last month's estimate, and 1.8% in 2019.
- 24% of Germans plan to travel more in 2018 vs. 2017, which is a slight increase on the 23 percent figure at the same time last year. Moreover, 30% want to spend more on travel and holidays in 2018.
- Nearly half (47%) of last year's total summer revenues have already been reached as of end-January. The top growth months are May, mostly due to spring holidays in several German regions, and September, but all months in the summer season are higher than last year at present.
- According to the ABTA Travel Trends Report 2018, although there is continued pressure on consumer spending power, ABTA research shows a notable increase in people planning to spend more on their holidays in the next 12 months. Over three in ten people (31%) plan to spend more, compared to 24% who stated this in 2016, with only 14% of people planning to spend less.
- New year peak sales began strongly with industry analyst GfK reporting bookings for summer 2018 up 7% on 2017 in the first full week of the year.
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## Visitor Statistics

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## Distribution by Island

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Feb. 2018P	YTD Feb. 2017P	% change YTD
O'ahu	103,118	102,017	-1.1%	12,087	11,759	2.8%
Maui County	65,293	61,148	-6.3%	5,538	5,806	-4.6%
...Maui	64,502	60,181	-6.7%	5,422	5,707	-5.0%
...Moloka'i	1,993	2,075	4.1%	224	302	-26.0%
...Lāna'i	1,584	1,315	-17.0%	199	234	-15.0%
Kaua'i	31,772	33,444	5.3%	3,192	2,919	9.3%
Hawai'i Island	48,481	52,313	7.9%	5,948	6,834	-13.0%

## Group vs. FIT; Leisure vs. Business

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Feb. 2018P	YTD Feb. 2017P	% change YTD
Group vs FIT						
Group tour	8,943	6,675	-25.4%	1,079	674	60.1%
True Independent	93,533	95,186	1.8%	11,916	11,564	3.0%
Leisure vs business						
Pleasure (Net)	124,394	122,964	-1.1%	14,258	13,348	6.8%
MCI (Net)	8,086	8,185	1.2%	1,243	1,205	3.2%
Convention/Conf.	4,740	5,819	22.8%	434	856	-49.3%
Corp. Meetings	1,317	1,408	7.0%	255	214	19.4%
Incentive	2,381	1,178	-50.5%	620	173	257.3%

## First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Feb. 2018P	YTD Feb. 2017P	% change YTD
1st timers (%)	70.8	71.2	0.4	57.5	64.3	-6.8
Repeaters (%)	29.2	28.8	-0.4	42.5	35.7	6.8

## Tax Revenue

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Feb. 2018P	YTD Feb. 2017P	% change YTD
State tax revenue generated* (\$ Millions)	41.25	33.89	-17.9%	4.45	4.85	-8.2%

\*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.

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