



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 March 2018 Quick Facts¹

Visitor Expenditures:	\$62 million
Primary Purpose of Stay:	Pleasure (22,471) vs. MCI (1,602)
Average Length of Stay:	13.69 days
First Time Visitors:	59.6%
Repeat Visitors:	40.4%

	2016	2017P	% Change 2017P vs 2016	2018 Forecast (Feb. 2018)	% Change 2017P vs 2018 Forecast	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
EUROPE MMA (by Air)								
Visitor Expenditures* (\$ Millions)	353.4	290.3	-17.9%	308.7	6.3%	62.0	62.2	-0.2%
Visitor Days	1,860,887	1,830,610	-1.6%	1,838,578	0.4%	363,970	336,593	8.1%
Arrivals	143,922	139,780	-2.9%	139,780	0.0%	26,589	24,710	7.6%
Per Person Per Day Spending* (\$)	189.9	158.6	-16.5%	167.9	5.9%	170.4	184.7	-7.7%
Per Person Per Trip Spending* (\$)	2,455.6	2,077.0	-15.4%	2,208.7	6.3%	2,332.8	2,515.3	-7.3%
Length of Stay (days)	12.93	13.10	1.3%	13.15	0.4%	13.69	13.62	0.5%

*Excludes supplemental business spending

Contact Information

Hawai'i Tourism Authority: Caroline Anderson, Tourism Brand Manager
Tel: (808) 973-2273
caroline@gohta.net

Hawai'i Tourism Europe:
UK:
Rosina Williams, Sales & Marketing Account
Director
Tel: 44 (0) 20 7593 1775
hawaii@hillsbalfour.com

Germany:
Katharina Dorr, Sales & Marketing Manager
Tel: 49 (0) 89 689 06 38 0
hawaii@lieb-management.de

France:

Annabelle Michaux, PR & Marketing Account

Director

Tel: 33 (0)1 53 25 11 11

hawaii@interfacetourism.com

Market Summary

- 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 dropped 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 three months of 2018, arrivals increased 7.6 percent to 26,589 visitors. However, lower daily spending (-7.7% to \$170 per person) resulted in no growth in visitor expenditures \$62 million (-0.2%). Arrivals for MCI purposes declined (-13% to 1,602 visitors) compared to year-to-date March 2017. Island distribution through March 2018 showed that 74 percent went to O'ahu, 34 percent to Maui, 33 percent to Island of Hawai'i and 19 percent to Kaua'i.

Market Conditions

- British businesses grew at the fastest rate in more than two years. The Confederation of British Industry's monthly growth indicator more than doubled to +20 percent in February, from +9 percent in January, reaching its highest since December 2015.
- Analysts report to see Germany's GDP expanding 2.4 percent in 2018 and 1.9 percent in 2019.
- The International Monetary Fund has confirmed an acceleration of the global economic growth for France, with an increase of 3.9 percent this year and in 2019.
- UK demand for overseas holidays is at record levels as the Office for National Statistics (ONS) data reports that the UK consumers took a record 46.5 million overseas holidays last year, one million more than the previous high of 45.5 million a decade ago.
- Consumers in Germany are willing to travel more than last year and increase their spending as well, according to the annual Reiseanalyse market survey. As many as 30 percent are ready to spend more on travel this year, with only 13 percent planning to cut back.

Distribution by Island

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
O'ahu	103,118	102,017	-1.1%	19,756	18,240	8.3%
Maui County	65,293	61,148	-6.3%	9,237	9,305	-0.7%
...Maui	64,502	60,181	-6.7%	9,048	8,800	2.8%
...Moloka'i	1,993	2,075	4.1%	342	743	-53.9%
...Lāna'i	1,584	1,315	-17.0%	298	319	-6.4%
Kaua'i	31,772	33,444	5.3%	5,104	4,544	12.3%
Hawai'i Island	48,481	52,313	7.9%	8,830	9,843	-10.3%

Group vs. FIT; Leisure vs. Business

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
Group vs FIT						
Group tour	8,943	6,675	-25.4%	1,454	1,042	39.5%
True Independent	93,533	95,186	1.8%	18,605	18,210	2.2%
Leisure vs business						
Pleasure (Net)	124,394	122,964	-1.1%	22,471	21,316	5.4%
MCI (Net)	8,086	8,185	1.2%	1,602	1,842	-13.0%
Convention/Conf.	4,740	5,819	22.8%	593	1,383	-57.2%
Corp. Meetings	1,317	1,408	7.0%	324	261	23.9%
Incentive	2,381	1,178	-50.5%	766	244	214.1%

First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
1st timers (%)	70.8	71.2	0.4	59.6	66.8	-7.2
Repeaters (%)	29.2	28.8	-0.4	40.4	33.2	7.2

Tax Revenue

EUROPE MMA (by Air)	2016	2017P	% Change 2017P vs 2016	YTD Mar. 2018P	YTD Mar. 2017P	% change YTD
State tax revenue generated* (\$ Millions)	41.25	33.89	-17.9%	7.24	7.25	-0.2%

*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

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

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.*