



## 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.

### July 2017 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$160.2 million
Primary Purpose of Stay:	Pleasure (63,776) vs. MCI (6,039)
Average Length of Stay:	13.19 days
First Time Visitors:	71.5%
Repeat Visitors:	28.5%

	2015	2016P	% Change 2016P vs 2015	2017 Forecast	% Change 2016P vs 2017 Forecast	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
EUROPE MMA (by Air)								
Visitor Expenditures* (\$ Millions)	337.2	341.8	1.4%	343.7	0.6%	160.2	182.4	-12.2%
Visitor Days	1,897,157	1,854,794	-2.2%	1,852,670	-0.1%	969,366	970,993	-0.2%
Arrivals	145,019	142,684	-1.6%	142,684	0.0%	73,469	75,279	-2.4%
Per Person Per Day Spending* (\$)	177.7	184.3	3.7%	188.0	2.0%	165.2	187.8	-12.0%
Per Person Per Trip Spending* (\$)	2,325.0	2,395.5	3.0%	2,408.7	0.6%	2,180.0	2,422.8	-10.0%
Length of Stay (days)	13.08	13.00	-0.6%	13.0	-0.1%	13.19	12.90	2.3%

\*Excludes supplemental business spending

### Contact Information

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

#### Hawai'i Tourism Europe:

##### UK:

Rosina Williams, Sales & Marketing Account Director  
 Tel: 44 (0) 20 7593 1775  
[hawaii@hillsbalfour.com](mailto:hawaii@hillsbalfour.com)

##### Germany:

Sabrina Hasenbien, Account Manager Sales and Marketing & PR  
 Tel: 49 (0) 89 689 06 38 0  
[hawaii@lieb-management.de](mailto:hawaii@lieb-management.de)

<sup>1</sup> 2016 and 2017 data are preliminary.

**France:**

Annabelle Michaux,  
PR & Marketing Account Director  
Tel: 33 (0)1 53 25 11 11  
[hawaii@interfacetourism.com](mailto:hawaii@interfacetourism.com)

## **Market Summary**

---

- Through July 2017, arrivals decreased 2.4% to 73,469 visitors. Lower daily spending (-12% to \$165 per person) also contributed to a 12.2% drop in visitor expenditures to \$160.2 million. MCI visitors increased 18.4% to 6,039 visitors. Looking at island distribution through July 2017, 73% went to O'ahu, 41% to Maui, 39% to Island of Hawai'i and 23% to Kaua'i.
- Preliminary 2016 data shows arrivals dropped 1.6% to 142,684 visitors and visitor days decrease 2.2% from 2015. Higher daily spending (+3.7% to \$184 per person) contributed to a 1.4 percent increase in visitor expenditures to \$341.8 million. MCI visitors decreased 13.1% to 8,031 visitors. Seventy-two percent (72%) of Europeans visited O'ahu, followed by Maui (45%), Island of Hawai'i (34%) and Kaua'i (22%).

## **Market Conditions**

---

- The Office for National Statistics (ONS) said the economy expanded by 0.3% in the quarter, up from 0.2% in the previous three months.
- Among long-haul destinations, the USA "remains by far the most popular destination for Germans, even if it is experiencing a slight decline at present", while Canada is enjoying strong demand this year, the DRV said. Other popular destinations this year include Asia, Australia, Africa and the Indian Ocean.
- Demand for winter 2017/18 holidays remains high, the GfK analysis showed. Bookings increased by 11% last month, following on from a 21% rise in May. Nearly a third of total travel agency revenues were generated by winter 2017/18 sales or very early bookings for summer 2018
- Germans booked more summer holidays last month compared to previous year figures and are also keen to snap up winter package offers, according to new travel agency sales figures.
- Group bookings for summer 2017 were up 11% with pricing up 1%, including significant growth to long-haul destinations. Thomas Cook added that winter 2017/18 was about 30% sold, with bookings ahead in all markets.
- Thomas Cook Airlines has announced a new route from Manchester to Seattle from May 2018, a move which cemented its position as "the largest long-haul carrier from Manchester". The flight, which will be on sale from £399.99, follows the recent introduction of San Francisco and a year-round service to New York (JFK) from Manchester.

## Visitor Statistics

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	2017 Forecast	% Change 2016P vs 2017 Forecast	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Visitor Expenditures* (\$ Millions)	337.2	341.8	1.4%	343.7	0.6%	160.2	182.4	-12.2%
Visitor Days	1,897,157	1,854,794	-2.2%	1,852,670	-0.1%	969,366	970,993	-0.2%
Arrivals	145,019	142,684	-1.6%	142,684	0.0%	73,469	75,279	-2.4%
Per Person Per Day Spending* (\$)	177.7	184.3	3.7%	188.0	2.0%	165.2	187.8	-12.0%
Per Person Per Trip Spending* (\$)	2,325.0	2,395.5	3.0%	2,408.7	0.6%	2,180.0	2,422.8	-10.0%
Length of Stay (days)	13.08	13.00	-0.6%	13.0	-0.1%	13.19	12.90	2.3%

\*Excludes supplemental business spending

## Distribution by Island

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
O'ahu	105,998	102,060	-3.7%	53,328	53,453	-0.2%
Maui County	61,005	65,497	7.4%	30,638	34,051	-10.0%
...Maui	60,361	64,707	7.2%	29,932	33,628	-11.0%
...Moloka'i	2,445	1,993	-18.5%	1,287	1,002	28.4%
...Lāna'i	1,492	1,570	5.2%	702	809	-13.2%
Kaua'i	33,406	31,605	-5.4%	17,101	15,592	9.7%
Hawai'i Island	49,755	48,606	-2.3%	28,528	24,513	16.4%

## Group vs. FIT; Leisure vs. Business

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Group vs FIT						
Group tour	8,399	8,599	2.4%	3,270	4,997	-34.6%
True Independent	94,079	92,950	-1.2%	50,635	49,286	2.7%
Leisure vs business						
Pleasure (Net)	126,397	122,818	-2.8%	63,776	64,075	-0.5%
MCI (Net)	9,246	8,031	-13.1%	6,039	5,099	18.4%
Convention/Conf.	6,369	4,719	-25.9%	4,488	2,369	89.5%
Corp. Meetings	1,296	1,319	1.7%	834	926	-10.0%
Incentive	1,834	2,349	28.1%	896	2,043	-56.1%

## First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
1st timers (%)	68.9	70.9	2.0	71.5	70.8	0.7
Repeaters (%)	31.1	29.1	-2.0	28.5	29.2	-0.7

## Tax Revenue

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
State tax revenue generated* (\$ Millions)	35.91	39.9	11.1%	18.69	21.29	-12.2%

\*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.