



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.

June 2017 Quick Facts¹

Visitor Expenditures:	\$128.6 million
Primary Purpose of Stay:	Pleasure (48,814) vs. MCI (5,065)
Average Length of Stay:	13.13 days
First Time Visitors:	70.9%
Repeat Visitors:	29.1%

	2015	2016P	% Change 2016P vs 2015	2017 Forecast	% Change 2016P vs 2017 Forecast	YTD Jun. 2017P	YTD Jun. 2016P	% change YTD
EUROPE MMA (by Air)								
Visitor Expenditures* (\$ Millions)	337.2	341.8	1.4%	343.7	0.6%	128.6	140.2	-8.3%
Visitor Days	1,897,157	1,854,794	-2.2%	1,852,670	-0.1%	748,813	753,718	-0.7%
Arrivals	145,019	142,684	-1.6%	142,684	0.0%	57,041	59,348	-3.9%
Per Person Per Day Spending* (\$)	177.7	184.3	3.7%	188.0	2.0%	171.7	185.9	-7.7%
Per Person Per Trip Spending* (\$)	2,325.0	2,395.5	3.0%	2,408.7	0.6%	2,254.0	2,361.5	-4.6%
Length of Stay (days)	13.08	13.00	-0.6%	13.0	-0.1%	13.13	12.70	3.4%

*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:

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

¹ 2016 and 2017 data are preliminary.

France:

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

Market Summary

- Through June 2017, arrivals decreased 3.9% to 57,041 visitors. Lower daily spending (-7.7% to \$172 per person) also contributed to a 8.3% dropped in visitor expenditures to \$128.6 million. MCI visitors increased 5.4% to 5,065 visitors. Looking at island distribution through June 2017, 71% went to O'ahu, 40% to Maui, 39% to Island of Hawai'i and 22% 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

- On 8th June 2017, the UK voted in the snap election called by Theresa May. Theresa May remains Prime Minister but Britain now has a hung parliament as no party won a majority of seats. Theresa May's Conservatives lost seats in England and Wales to Labour and the Liberal Democrats, despite seeing their vote share rise.
- The Confederation of British Industry (CBI) on Tuesday bumped up its forecast for economic growth in Britain. The economy looks on course to grow 1.6 percent this year and 1.4 percent in 2018, up from forecasts made last November of 1.3 percent and 1.1 percent. Like the Bank of England, the CBI's forecasts rely on a "smooth" transition as Britain leaves the European Union.
- With a GDP of \$295 billion in 2016, Denmark has been ranked the 39th largest economy in the world.
- German business confidence rose to 115.1 points in June, up from 114.6 in May, marking an all-time high and overshooting market expectations of a decline to 114.5 points. The UK economy continues to boast the most impressive growth among the G7 and advanced world economies. Despite initial concerns following Britain's decision to leave the European Union, overall it is very much business as usual.
- Online Travel Agencies remain prominent in travel planning. They stood as the most used resource in planning, closely followed by search engines and travel review sites.
- Following best value for money, the ability to be outdoors and active ranked second most important to Brits when planning a holiday. In particular, this was important to millennials, of which 78% voted this a priority. Being outdoors and active was closely followed by 'bucket list' activities and 'off the beaten path' locations.
- Travel agencies in Germany increased their overall holiday sales by 4% in May, the latest representative sales analysis of 1,500 agencies by market researchers GfK found. The key factor in this surge, according to GfK, is the continuing policy for leading tour operators to open up their winter product for travel agency bookings ahead of their official brochure presentations and earlier than in previous years.

Visitor Statistics

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Distribution by Island

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jun. 2017P	YTD Jun. 2016P	% change YTD
O'ahu	105,998	102,060	-3.7%	40,631	42,481	-4.4%
Maui County	61,005	65,497	7.4%	23,522	25,617	-8.2%
...Maui	60,361	64,707	7.2%	22,888	25,262	-9.4%
...Moloka'i	2,445	1,993	-18.5%	1,056	788	34.0%
...Lāna'i	1,492	1,570	5.2%	558	665	-16.1%
Kaua'i	33,406	31,605	-5.4%	12,789	11,315	13.0%
Hawai'i Island	49,755	48,606	-2.3%	22,270	18,845	18.2%

Group vs. FIT; Leisure vs. Business

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jun. 2017P	YTD Jun. 2016P	% change YTD
Group vs FIT						
Group tour	8,399	8,599	2.4%	2,617	4,398	-40.5%
True Independent	94,079	92,950	-1.2%	39,298	39,489	-0.5%
Leisure vs business						
Pleasure (Net)	126,397	122,818	-2.8%	48,814	49,455	-1.3%
MCI (Net)	9,246	8,031	-13.1%	5,065	4,804	5.4%
Convention/Conf.	6,369	4,719	-25.9%	3,628	2,269	59.9%
Corp. Meetings	1,296	1,319	1.7%	793	850	-6.7%
Incentive	1,834	2,349	28.1%	793	1,905	-58.4%

First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jun. 2017P	YTD Jun. 2016P	% change YTD
1st timers (%)	68.9	70.9	2.0	70.9	70.4	0.5
Repeaters (%)	31.1	29.1	-2.0	29.1	29.6	-0.5

Tax Revenue

EUROPE MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jun. 2017P	YTD Jun. 2016P	% change YTD
State tax revenue generated* (\$ Millions)	35.91	39.9	11.1%	15.01	16.36	-8.3%

*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.