



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.

October 2017 Quick Facts¹

Visitor Expenditures:	\$253.1 million
Primary Purpose of Stay:	Pleasure (105,868) vs. MCI (7,482)
Average Length of Stay:	12.97 days
First Time Visitors:	72.9%
Repeat Visitors:	27.1%

	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
EUROPE MMA (by Air)								
Visitor Expenditures* (\$ Millions)	337.2	353.4	4.8%	331.1	-6.3%	253.1	294.7	-14.1%
Visitor Days	1,897,157	1,860,887	-1.9%	1,867,300	0.3%	1,561,356	1,606,986	-2.8%
Arrivals	145,019	143,922	-0.8%	140,377	-2.5%	120,374	124,567	-3.4%
Per Person Per Day Spending* (\$)	177.7	189.9	6.9%	177.3	-6.6%	162.1	183.4	-11.6%
Per Person Per Trip Spending* (\$)	2,325.0	2,455.6	5.6%	2,358.4	-4.0%	2,102.3	2,365.6	-11.1%
Length of Stay (days)	13.08	12.93	-1.2%	13.30	2.9%	12.97	12.90	0.5%

*Excludes supplemental business spending

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Market Summary

- Through October 2017, arrivals decreased 3.4% to 120,374 visitors. Lower daily spending (-11.6% to \$162 per person) also contributed to a 14.1% drop in visitor expenditures to \$253.1 million. MCI visitors were flat 0% to 7,482 visitors. Looking at island distribution through October 2017, 72% went to O'ahu, 44% to Maui, 38% to Island of Hawai'i and 24% to Kaua'i.
- In 2016, arrivals dropped slightly (-0.8%) to 143,922 visitors and visitor days decreased 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

- The British economy picked up pace in the third quarter of the year, according to preliminary data released by the Office for National Statistics (ONS) on 25 October.
- Unemployment rate remains at multi-decade low in the June-August period in the UK. It remained at 4.3% in the June-August period, matching market expectations and marking the joint-lowest rate since 1975.
- North America was ranked higher than competitors (16%) compared to Asia (10%) and Australia/New Zealand (6%) in the most popular destination to visit in the next 12 months according to the ABTA Holiday Trends 2017 report.
- Budget airlines, led by Eurowings, Ryanair and Easyjet, now control a quarter of the German air travel market and are set for more following the collapse of Air Berlin, according to a new survey. The flight capacity of budget carriers currently amounts to 25% of total seat capacity in the German air travel market, the latest annual Low Cost Monitor by the German Aerospace Centre (DLR) found.
- The World/European Luxury Travel Report from IPK International found that in planning stages, the internet was used by some 83% of international luxury travellers, but 51% of them also used travel agencies as an information source. The study also showed a boom in "spending heavily" on travel, with a rise of about 18% in luxury travel since 2014, growing at around twice the rate as international travel in general, which rose by about 9% over the same period. The most popular destination by far was the US, receiving 8.1 million luxury trips, in Europe.

Visitor Statistics

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Length of Stay (days)	13.08	12.93	-1.2%	13.30	2.9%	12.97	12.90	0.5%

*Excludes supplemental business spending

Distribution by Island

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
O'ahu	105,998	103,118	-2.7%	87,037	88,283	-1.4%
Maui County	61,005	65,293	7.0%	53,305	57,857	-7.9%
...Maui	60,361	64,502	6.9%	52,428	57,212	-8.4%
...Moloka'i	2,445	1,993	-18.5%	1,826	1,662	9.8%
...Lāna'i	1,492	1,584	6.2%	1,166	1,385	-15.8%
Kaua'i	33,406	31,772	-4.9%	29,244	27,826	5.1%
Hawai'i Island	49,755	48,481	-2.6%	45,958	42,215	8.9%

Group vs. FIT; Leisure vs. Business

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
Group vs FIT						
Group tour	8,399	8,943	6.5%	6,160	7,467	-17.5%
True Independent	94,079	93,533	-0.6%	79,885	79,949	-0.1%
Leisure vs business						
Pleasure (Net)	126,397	124,394	-1.6%	105,868	107,234	-1.3%
MCI (Net)	9,246	8,086	-12.5%	7,482	7,486	0.0%
Convention/Conf.	6,369	4,740	-25.6%	5,265	4,394	19.8%
Corp. Meetings	1,296	1,317	1.6%	1,303	1,106	17.8%
Incentive	1,834	2,381	29.8%	1,119	2,271	-50.7%

First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
1st timers (%)	68.9	70.8	-1.9	72.9	71.9	1.1
Repeaters (%)	31.1	29.2	1.9	27.1	28.1	-1.1

Tax Revenue

EUROPE MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
State tax revenue generated* (\$ Millions)	38.10	41.25	8.3%	29.54	34.40	-14.1%

*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.