



Europe Fact Sheet

Europe Overview

Hawai'i Tourism Europe (HTE) targets visitors from the countries of United Kingdom and Germany, which are the top two source markets in the Europe major market area. Europe visitors have the longest average length of stay of all visitors to Hawai'i.

Hawai'i continues to be represented in Europe with offices in London and Munich. Highlighted 2020 HTE activities include: 1) in-house and online travel trade training programs; 2) Hawai'i specialist incentive familiarization trips (FAMs); and 3) individual and group press trips.

January 2020 Quick Facts¹

Visitor Expenditures:	\$16.0 million
Primary Purpose of Stay:	Pleasure (6,466) vs. MCI (942)
Average Length of Stay:	13.04 days
First Time Visitors:	68.8%
Repeat Visitors:	31.2%

EUROPE MMA (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	326.3	274.1	-16.0%	NA	NA	16.0	19.2	-16.5%
Visitor Days	1,902,379	1,789,549	-5.9%	NA	NA	103,717	118,915	-12.8%
Arrivals	144,953	138,550	-4.4%	NA	NA	7,956	8,062	-1.3%
Per Person Per Day Spending* (\$)	171.5	153.2	-10.7%	NA	NA	154.5	161.4	-4.3%
Per Person Per Trip Spending* (\$)	2,251.2	1,978.6	-12.1%	NA	NA	2,013.5	2,381.3	-15.4%
Length of Stay (days)	13.12	12.92	-1.6%	NA	NA	13.04	14.75	-11.6%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

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¹ 2020 and 2019 visitor data are preliminary. 2018 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database and data from the National Travel and Tourism Office.

Market Summary

- In 2019, decreased arrivals (-4.4% to 138,550 visitors) and lower daily spending (-10.7% to \$153 per person) resulted in a 16.0 percent drop in visitor expenditures to \$274.1 million. Arrivals for MCI purposes (-34.7% to 5,353 visitors) declined compared to 2018. Island distribution in 2019 showed that 74.3 percent went to O'ahu, 43.9 percent to Maui, 31.6 percent to the island of Hawai'i, and 26.0 percent to Kaua'i.
- In January 2020, fewer arrivals (-1.3% to 7,956 visitors) and lower daily spending (-4.3% to \$154 per person) led to a decline in visitor spending (-16.5% to \$16.0 million) compared to January 2019. Arrivals for MCI purposes (+17.1% to 942 visitors) increased compared to January 2019. Island distribution in January 2020 showed that 78.1 percent went to O'ahu, 34.6 percent to Maui, 27.5 percent to the island of Hawai'i, and 24.3 percent to Kaua'i.

Market Conditions

- The Pound Sterling finished January 2020 strongly at \$1.33, the Euro moved down slightly to \$1.10, while the Swiss Franc fell slightly to \$1.01.
- On January 31, 2020 the UK left the European Union (EU). Prime Minister Boris Johnson has vowed to bring the country together and move it "forward". There will be a transitional period for the remainder of the year, when the UK will be allowed to negotiate new trade deals with other countries, whilst also discussing a free trade deal with the EU.
- Under the UK-EU deal following Brexit, British families can rest assured that everything will stay the same as when the UK was still an EU member. British citizens can still travel freely with a passport until the end of the transition period in 2020. There will be no additional border checks so airport queues should not be longer, and the current Great Britain passport will be valid until date of expiry. Changes to travel after the transition period starting in 2021 will be decided in the negotiations on the EU-UK relationship.
- ABTA research has revealed that package holidays are still dominating the UK outbound tourism market. Since 2014, half of all holidays taken by UK travelers annually have been package holidays and this figure is staying steady.
- GDP in Germany improved toward the end of 2019 but still reported its slowest economic growth in 6 years. The Gross Domestic Product of Germany grew 0.6 percent in 2019 compared to 2018.
- Focus Economics Consensus Forecast panelists expect the German economy to increase 1.4 percent in 2020. The unemployment rate remains consistent at 3.2 percent.
- Following the collapse of Thomas Cook in 2019, Hays Travel has announced that they now have more staff in the 461 former Thomas Cook shops than at the time of its collapse. 2,000 of the 2,500 retail staff employed by Thomas Cook has been retained by Hays Travel and they now have a total of 3,000 employed in the shops. Hays Travel said that the business made more than £2 billion worth of sales in the year when its acquisition of the Thomas Cook retail estate expanded its network from 180 shops to more than 640.

Distribution by Island

EUROPE MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
O'ahu	107,384	102,887	-4.2%	6,215	6,237	-0.4%
Maui County	62,970	61,746	-1.9%	2,854	3,473	-17.8%
Maui	62,194	60,756	-2.3%	2,755	3,440	-19.9%
Moloka'i	2,833	1,771	-37.5%	140	128	9.2%
Lāna'i	1,470	1,620	10.2%	116	67	72.5%
Kaua'i	37,015	36,044	-2.6%	1,933	2,173	-11.0%
Island of Hawai'i	48,899	43,753	-10.5%	2,187	2,579	-15.2%

Group vs. True Independent; Leisure vs. Business

EUROPE MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	7,422	7,020	-5.4%	700	220	218.7%
True Independent (Net)	98,536	97,374	-1.2%	5,656	6,502	-13.0%
Leisure vs business						
Pleasure (Net)	124,157	121,983	-1.8%	6,466	6,690	-3.3%
MCI (Net)	8,195	5,353	-34.7%	942	805	17.1%
Convention/Conf.	5,791	2,966	-48.8%	544	683	-20.3%
Corp. Meetings	895	974	8.8%	100	61	63.7%
Incentive	1,704	1,628	-4.4%	321	78	312.5%

First Timers vs. Repeat Visitors

EUROPE MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
1st timers (%)	69.5	70.6	1.1	68.8	62.0	6.8
Repeaters (%)	30.5	29.4	-1.1	31.2	38.0	-6.8

Tax Revenue

EUROPE MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
State tax revenue generated* (\$ Millions)	38.09	32.00	-16.0%	1.87	2.24	-16.5%

*State government tax revenue generated (direct, indirect, and induced)