



Europe Fact Sheet

Europe Overview

Europe is a key international market for Hawai'i, with a focus on Germany and the UK, two of Europe's leading outbound travel markets. European visitors have the highest average length of stay among Hawai'i's major markets, making the region an important source of high-value travelers. Strengthening Hawai'i's appeal as a preferred destination remains a strategic priority as European travelers increasingly make purpose-driven choices centered on adventure, culture, food, wellness, and nature. Messaging positions Hawai'i as a multi-island destination offering rich cultural experiences and diverse landscapes that appeal to travelers seeking meaningful and immersive travel

Year-to-Date June 2026 Quick Facts^{1/}

Visitor Expenditures:	\$139.2 million
Primary Purpose of Stay:	Pleasure (38,575) vs. MCI (2,158)
Average Length of Stay:	11.89 days
First Time Visitors:	64.9%
Repeat Visitors:	35.1%

EUROPE MMA (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD June 2026P	YTD June 2025P	% Change
Visitor Expenditures* (\$ Millions)	N/A	52.9	306.0	369.0	317.0	355.8	339.5	139.2	148.7	-6.4%
Visitor Days	296,487	314,899	1,592,705	1,517,015	1,486,935	1,473,989	1,372,796	535,027	619,799	-13.7%
Arrivals	21,550	18,775	114,041	117,241	117,962	114,845	111,556	44,979	49,997	-10.0%
Average Daily Census	810	863	4,364	4,156	4,063	4,038	3,761	2,956	3,424	-13.7%
Per Person Per Day Spending* (\$)	N/A	167.9	192.1	243.2	213.2	241.4	247.3	260.1	239.9	8.4%
Per Person Per Trip Spending* (\$)	N/A	2,815.3	2,683.4	3,147.0	2,687.6	3,098.0	3,043.0	3,093.8	2,974.5	4.0%
Length of Stay (days)	13.76	16.77	13.97	12.94	12.61	12.83	12.31	11.89	12.40	-4.0%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2026 annual forecast (Quarter 2, 2026).

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^{1/} 2026P and 2025P visitor data are preliminary. 2020 – 2024 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, APIS I-94 data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first half of 2026, 44,979 visitors arrived by air service from Europe (including United Kingdom, France, Germany, Italy, and Switzerland), total visitor spending was \$139.2 million and daily spending was \$260 per person. In the first half of 2025, 49,997 visitors arrived from Europe, total visitor spending was \$148.7 million and daily spending was \$240 per person.
- In 2025, 114,845 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland), total visitor spending was \$355.8 million and daily spending was \$241 per person.

Market Conditions (Updated Quarterly)

- UK inflation held at 2.8 percent in May 2026. The labor market is softening, but Quarter 1 GDP growth of 0.8 percent exceeded expectations. The British pound remains relatively strong at approximately US\$1.38, supporting purchasing power for U.S. travel.
- German inflation eased to 2.6 percent in May 2026. Switzerland remains relatively stable, with inflation at just 0.6 percent and a strong Swiss franc supporting purchasing power for international travel.
- UK outbound travel remains resilient, with travel businesses reporting year-to-date bookings up an average of 4 percent.
- Germany remains Europe's largest outbound travel market, with bookings reaching a record €76.3 billion in 2025, although economic and geopolitical pressures may temper near-term long-haul demand.
- Long-haul competition continues to strengthen, particularly from Thailand, which is benefiting from expanded UK air service to Phuket and Bangkok. The easing of some Middle East travel restrictions is reopening destinations such as Dubai and Jordan to European travelers.
- Around 70 percent of surveyed consumers intend to spend the same or more on holidays in 2026.
- Late-booking behavior continues with consumers booking closer to departure in search of value and due to concerns of economic uncertainty.
- In Germany, economic and geopolitical pressures are encouraging some travelers to stay closer to home, with cross-border rail travel now 30 percent above 2019 levels.
- Experiential and off-peak travel continue to gain momentum across Europe.

Distribution by Island

Europe MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
O'ahu	15,411	11,843	82,748	92,772	96,301	90,744	36,709	39,974	-8.2%
Maui County	8,535	6,129	47,654	39,712	34,945	47,322	N/A	17,184	N/A
Maui	8,315	5,967	46,788	38,675	34,597	46,743	16,592	17,031	-2.6%
Moloka'i	433	245	1,641	1,164	794	1,131	N/A	313	N/A
Lāna'i	253	221	1,247	1,846	597	675	N/A	221	N/A
Kaua'i	4,696	3,135	27,333	28,113	26,580	29,015	8,914	10,557	-15.6%
Island of Hawai'i	6,634	4,539	39,477	36,665	34,966	40,904	13,904	14,556	-4.5%

P=Preliminary data.

N/A=Due to limited data, Moloka'i and Lāna'i statistics are not available.

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2020*	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
Group vs True Independent (Net)									
Group Tour	N/A	521	4,892	4,888	4,068	3,847	2,282	2,335	-2.3%
True Independent (Net)	N/A	16,198	83,739	87,815	89,776	86,937	31,999	37,285	-14.2%
Leisure vs Business									
Pleasure (Net)	17,442	14,071	97,416	100,817	100,848	100,318	38,575	41,765	-7.6%
MCI (Net)	2,047	348	5,493	6,102	5,584	6,467	2,158	4,506	-52.1%
Convention/Conf.	829	156	2,697	3,438	3,456	4,198	885	2,652	-66.6%
Corp. Meetings	372	140	1,202	1,289	900	939	378	770	-50.9%
Incentive	967	82	1,810	1,645	1,400	1,508	913	1,255	-27.3%

N/A = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data.

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2020*	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
First Time Visitors (%)	N/A	54.0	70.0	68.4	68.9	70.7	64.9	69.8	-4.9
Repeat Visitors (%)	N/A	46.0	30.0	31.6	31.1	29.3	35.1	30.2	4.9

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data.

Tax Revenue

Europe MMA (by Air)	2020*	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
State tax revenue generated (\$ Millions)	N/A	6.17	35.50	42.80	44.34	49.76	19.46	20.80	-6.4%

³State government tax revenue generated (direct, indirect, and induced) for 2024, 2025P; year-to-date 2025P and year-to-date 2026P were calculated using the new Hawai'i Tourism Input-Output model (October 2025) and are not directly comparable to previous years' calculations.