



Europe Fact Sheet

Europe Overview

Hawai'i Tourism Europe (HTE) will focus on priority markets in the U.K., Germany, and Switzerland, employing a strategic mix of consumer marketing, public relations, and travel trade partnerships to strengthen Hawai'i's brand awareness in the region. HTE continues to target high-value travelers who demonstrate strong per-person spending and have a deep appreciation for Hawai'i's unique culture and heritage. A key initiative is the 'Ōlelo Hawai'i campaign, which centers on Hawaiian language, history, and cultural heritage to inspire European travelers.

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

Visitor Expenditures: \$46.0 million
 Primary Purpose of Stay: Pleasure (12,373) vs. MCI (1,494)
 Average Length of Stay: 11.49 days
 First Time Visitors: 62.2%
 Repeat Visitors: 37.8%

EUROPE MMA (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
Visitor Expenditures* (\$ Millions)	NA	52.9	306.0	369.0	317.0	355.8	357.0	46.0	48.6	-5.3%
Visitor Days	296,487	314,899	1,592,705	1,517,015	1,486,935	1,473,989	1,449,899	169,246	180,297	-6.1%
Arrivals	21,550	18,775	114,041	117,241	117,962	114,845	113,121	14,724	13,767	6.9%
Average Daily Census	810	863	4,364	4,156	4,063	4,038	3,972	2,869	3,056	-6.1%
Per Person Per Day Spending* (\$)	NA	167.9	192.1	243.2	213.2	241.4	246.2	272.1	269.8	0.8%
Per Person Per Trip Spending* (\$)	NA	2,815.3	2,683.4	3,147.0	2,687.6	3,098.0	3,155.7	3,127.4	3,533.6	-11.5%
Length of Stay (days)	13.76	16.77	13.97	12.94	12.61	12.83	12.82	11.49	13.10	-12.2%

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.

^{2/}Dept. of Business, Economic Development & Tourism (DBEDT) 2026 annual forecast (Quarter 1, 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.

^{2/} Due to limited data, Moloka'i and Lāna'i visitor statistics were not reported for February 2026. Total arrivals statewide, arrivals to O'ahu, Maui, Kaua'i and Hawai'i Island and arrivals by visitor markets were not affected. Year-to-Date 2026 Visitor spending, visitor days, length of stay and average daily census data did not include those who visited Moloka'i and Lāna'i.

Market Summary

- In the first two months of 2026, 14,724 visitors arrived by air service from Europe (including United Kingdom, France, Germany, Italy, and Switzerland), total visitor spending was \$46.0 million and daily spending was \$272 per person. In the first two months of 2025, 13,767 visitors arrived from Europe, total visitor spending was \$48.6 million and daily spending was \$270 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)

- Early-2026 conditions reflected easing inflation, softer labor markets in the UK and Germany, and expectations for lower-for-longer interest rates. Switzerland stood out for price stability and labor resilience, though growth concerns persisted across all markets.
- Inflation trends shifted across markets heading into January 2026. UK inflation rose to 3.4 percent in December 2025, driven by services and housing costs. Germany's inflation was around 2.1 percent, near the ECB target as price pressures stabilized, while Switzerland remained close to 0 percent amid a strong currency and weak domestic demand.
- Economic growth remained subdued. The UK recorded modest late-2025 gains, including a 0.1 percent increase in the three months to November 2025. Germany saw limited growth supported by services despite weak industry, while Switzerland maintained steady but modest expansion.
- Outbound travel demand remained strong. Surveys indicate 84 percent of travelers in major markets (UK, Germany, Switzerland) plan to travel the same or more in 2026, with many expecting to maintain or increase spending. UK demand was particularly resilient, with bookings tracking 24 percent ahead of 2025. However, travel to the United States was comparatively weaker. Overseas visitation declined in 2025, including from Western Europe, with a further 2.5–4 percent drop projected before a modest recovery in 2026.
- Sentiment toward U.S. travel was mixed, with political uncertainty and policy concerns dampening demand for some destinations such as Florida, while boosting interest in alternatives like Canada and Australia. The 2026 FIFA World Cup is expected to drive demand, though some luxury travelers plan to avoid peak periods due to pricing and crowds.
- Value-seeking behaviors were widespread across demographics. Many younger travelers relied on credit or installment payments, while increased use of price alerts reflected deal-hunting trends. High-net-worth travelers also focused on value, frequently leveraging loyalty programs and rewards points.
- Wellness-driven travel remained prominent, with 69 percent citing mental reset as a key motivation and growing demand for slower-paced experiences such as walking holidays.
- Alaska Airlines continued to promote its expanded Seattle hub with new non-stop routes to Europe, strengthening connectivity to Hawai'i. New flights include the daily, year-round London Heathrow service beginning May 21, 2026, seasonal Rome service starting April 28, 2026, and daily summer Reykjavik service beginning May 28, 2026.

Distribution by Island

Europe MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
O'ahu	15,411	11,843	82,748	92,772	96,301	90,744	11,142	10,528	5.8%
Maui County	8,535	6,129	47,654	39,712	34,945	47,322	5,755	5,064	13.6%
Maui	8,315	5,967	46,788	38,675	34,597	46,743	5,684	5,028	13.0%
Moloka'i	433	245	1,641	1,164	794	1,131	142	78	82.5%
Lāna'i	253	221	1,247	1,846	597	675	31	37	-15.8%
Kaua'i	4,696	3,135	27,333	28,113	26,580	29,015	2,287	2,278	0.4%
Island of Hawai'i	6,634	4,539	39,477	36,665	34,966	40,904	4,917	4,175	17.8%

P=Preliminary data.

Group vs. True Independent; Leisure vs. Business

Europe MMA (by Air)	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	521	4,892	4,888	4,068	3,847	930	847	9.8%
True Independent (Net)	NA	16,198	83,739	87,815	89,776	86,937	10,854	10,529	3.1%
Leisure vs Business									
Pleasure (Net)	17,442	14,071	97,416	100,817	100,848	100,318	12,373	10,788	14.7%
MCI (Net)	2,047	348	5,493	6,102	5,584	6,467	1,494	1,515	-1.4%
Convention/Conf.	829	156	2,697	3,438	3,456	4,198	767	737	4.1%
Corp. Meetings	372	140	1,202	1,289	900	939	311	312	-0.3%
Incentive	967	82	1,810	1,645	1,400	1,508	432	532	-18.7%

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.

First Timers vs. Repeat Visitors

Europe MMA (by Air)	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	NA	54.0	70.0	68.4	68.9	70.7	62.2	63.8	-1.6
Repeat Visitors (%)	NA	46.0	30.0	31.6	31.1	29.3	37.8	36.2	1.6

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 Feb. 2026P 3/	YTD Feb. 2025P	% Change
State tax revenue generated (\$ Millions)	NA	6.17	35.50	42.80	44.34	49.76	6.44	6.80	-5.3%

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.