

Europe Market Update

Chris Lee

*Managing Director
Hawai'i Tourism Europe*

2026 Spring Tourism Update



EUROPE ECONOMY

UNEMPLOYMENT

UK

5.1%

DE

6.3%

CH

3.2%

INFLATION

UK

3%

DE

1.9%

CH

0.1%

EXCHANGE RATE - USD

GB£

1.34

DE€

1.09

CHF

1.13

- Unemployment stable across all three markets
- UK inflation above target, DE and CH under control
- Middle East conflict adding inflation risk, driving up energy prices, and increasing interest rates - weighing on consumer confidence
- GB£ / Euro weakening against US\$ - increasing travellers' costs

*Data based on latest available 26 March



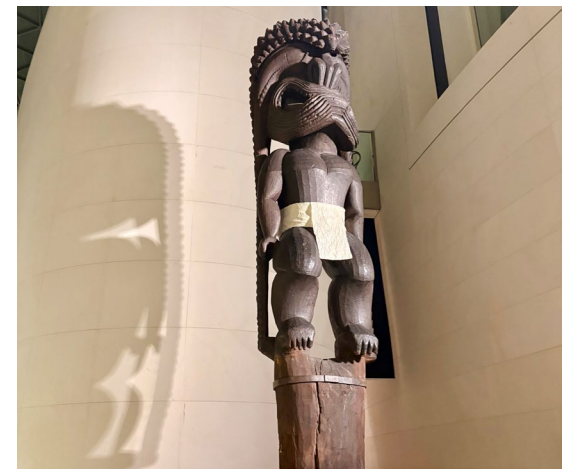
CONSUMER TRENDS

- Travel remains a priority even among cautious consumers
- European travellers are taking fewer trips, with longer stays
- Long-haul demand remains robust despite uncertainty
- Demand is shifting, not collapsing - travellers are rerouting west, not cancelling
- Hawai'i is outperforming continental USA

- 
- An aerial photograph of a tropical coastline. A dense, green forest covers a steep hillside that meets the ocean. A winding, light-colored road or path snakes along the edge of the forest, just above the shoreline. The ocean is a deep blue, with white waves breaking against a dark, rocky beach. The sky is a pale blue with some light clouds. The overall scene is one of natural beauty and tranquility.
- USA: Hawai'i, Alaska and Deep South standout performers
 - Competitive set expanding as long-haul destinations invest in Europe
 - Short-term gain for short-haul and western destinations as travellers prioritise familiarity and safety

Q1 ACTIVITY CONSUMER

- British Museum Partnership – Hawai'i: A Kingdom Crossing Oceans – January 15 – May 24
- 6.5 Million Visitors Annually (42% London / 36% UK)
- Ave. 80,000 visitors to the Hotung Exhibition Gallery
- Visual Identify & Recognition for the Hawaiian Islands
- 800 Attended Launch Event – January 13
- Journeyscape Competition – March 31



Q1 ACTIVITY MEDIA

- Visit USA 'Meet the Media' and British Museum Press Launch – January 12
- British Museum 'Behind-the-Scenes' – January 22
- 3 Press Releases
- 111 – Media Interactions
- 11 Stories – Earned Print
- 16 Stories – Earned Digital Media
- 13 Stories – Media FAMs

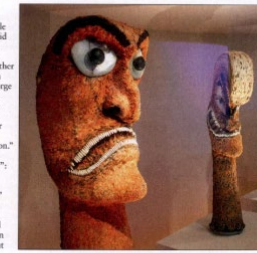
Exhibition of the week Hawai'i: a kingdom crossing oceans

The British Museum, London WC1 (020-7323 8181, britishmuseum.org). Until 25 May

In 1810, the warrior chief Kamehameha I united the Hawaiian islands into a single kingdom. That same year, said Emma Stokes in *The Daily Telegraph*, he dispatched an extraordinary cargo to the other side of the world, along with a formal appeal to King George III to make Great Britain his own island nation's "natural ally". "Should any of the powers which you are at war with molest me," he wrote, "I shall expect your protection." The letter was sent with "a gift of astonishing splendour": a cloak fashioned from "hundreds of thousands of red and yellow bird feathers" – which was worn by only the highest-ranking chief, and which "embodied sacred authority". It has not been on public display since 1900, but now takes "pride of place" in a "thrilling" new show that illustrates both the range of the British Museum's Hawaiian collections, and the friendly relations between the two kingdoms until Hawai'i's official annexation by the US in 1898. There are a wealth of spectacular exhibits, including a trio of feathered *ahua ipou*, which encapsulate a chieftain's power and "exude a ferocious energy". The exhibition "treats artefacts as living objects", and gives voice to a "fascinating, rarely heard culture".

at the heart of this tremendous show is a "desperate tragedy", said Laura Cumming in *The Observer*. In 1824, Kamehameha's son Liholiho and his wife Queen Kāmāmalu travelled to London, where they were received with full honours, celebrated by society and stored in for an audience with the profligate George IV – "one of the worst monarchs in British history". We see a lithograph of the Hawaiians "beaming" through a performance at the Theatre Royal, and Regency portraits of the couple, dressed in the English fashions of the day. But, unused to foreign climes, they both contracted measles and died within a week of each other; they never met George IV, though he did at least pay their hotel bills, and ordered a ship to transport their bodies home.

The show's narrative isn't the easiest to follow, said Laura Freeman in *The Times*: "I felt somewhat swamped by the history and the who's who of Hawaiian royal genealogy." Yet the artefacts it contains are "dazzling". Highlights include textile panels decorated with "chevrons, stripes, steps and zigzags", helmets worn from climbing plants, even a "tiny, endearing turtle ornament carved from whale ivory and set with tortoiseshell eyes". Best of all is a cabinet full of "feathered cloaks, caplets, chokers, tokens, garlands and fans", many embellished with feathers from the now-extinct *o'o* bird. It's a grown-up event that recognises our Georgian ancestors as humans, rather than demons; yet never lets them off "scot-free" for their plundering ways. In short, it's an exemplary *British Museum* show – "handsome", "intelligent" and never less than interesting.



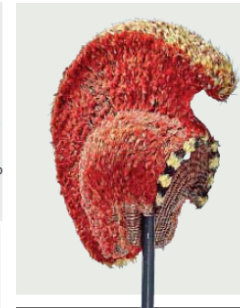
The feathered ahua ipou "exude a ferocious energy"

HAWAII: A KINGDOM CROSSING OCEANS, BRITISH MUSEUM

This is a surprisingly intimate show – one modest room that takes on centuries of history and politics. And there is one particular episode of history that grounds the exhibition: the visit of King Liholiho of Hawai'i and Queen Kāmāmalu to London – including the British Museum – in 1824 to seek an audience with George IV and a political alliance with Britain. Alas, the poor young king and queen contracted measles and died a few streets from the museum, but it is this encounter and the relationship that follows that frame the show.

At the centre is a blazing red feather cloak, gifted by the previous king, Kamehameha I, to George III. Nearby, helmets, feathered regalia and finely worked textiles extend the story, showing how status, spirituality and lineage were carried on the body, feather by feather, fibre by fibre. The exhibition sketches a wide arc from ancestral ocean voyages to 19th-century diplomacy, notably Queen Victoria's refusal to shield Hawai'i from American encroachment. In the end, the quiet achievement of this compact show is that it lets a handful of gifts, ceremonial outfits, ancestral garments and hair-worked treasures carry a vast story.

★ ★ ★ Until May 25 Agnes Dauti



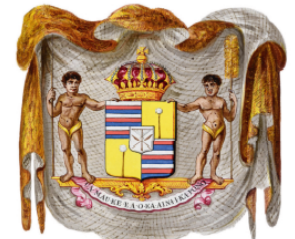
Arts & antiques



Carla Passino

Faraway, so close

Ties between Britain and Hawai'i ran deep, so much that the Union Jack was included in the Pacific country's new flag and its coat of arms was designed in London, as a British Museum exhibition highlights



JUST before Kamehameha was born on Hawai'i Island in about 1758, a light appeared in the sky with feathers like a bird, presaging greatness. Should the comet not be portent enough, the young warrior quickly proved his mettle against the Naha Stone, a massive piece of volcanic rock meant to identify the true heirs of the Naha chieftain line. In a prophecy with Arthurian echoes, the priestess Kalanipouli foretold that, if Kamehameha lifted the birthstone, he would rule over all the Hawaiian islands. He put his shoulders to the three-ton slab and promptly overturned it.

Kamehameha did go on to conquer the islands from Hawai'i to Ni'ihau – but perhaps not only because of divine favour or physical strength. A strategic hotshot, he was quick to grasp the potential of the ships, cannons and muskets that came with Capt James Cook and the sailors that followed in his wake. From that initial contact, Hawai'i and Britain, two island nations more than 7,000 miles apart, would build a lasting, if complex, connection, which the British Museum is exploring in a new exhibition, 'Hawai'i: a kingdom crossing oceans'.

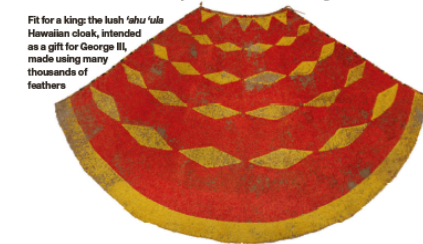
Long before Kamehameha became king, Polynesian master navigators followed the sea, the wind, the nightly and migratory birds to reach Hawai'i. In the culture of those early Kānaka

'Ōiwi (native Hawaiians), gods, the land and the chiefs that governed it were strongly interconnected, a link that the exhibition captures at its very entrance with a sculpture of Kū, one of the archipelago's many deities. Lead curator Alice Christophe, who worked closely with native Hawaiian stewards, explains that the islands' rulers, descended from the gods, mediated between the divine and the earthly, protecting common people from unseen forces and ensuring their wellbeing. Some chiefs had guardianship of the gods and in 1792, when high chief Kalanipouli died, he bequeathed political power to his son Kiwala'o, but left custody of Kū's ilimo, a manifestation of the war god Kū, to his nephew Kamehameha. War soon broke out between the two chiefs, with the latter triumphing over his cousin.

By the time of Cook's former midshipman, Capt George Vancouver, arrived in Hawai'i 10 years later, Kamehameha had consolidated control of Hawai'i Island, captured an American merchant ship, enlisted British sailors Isaac Davis and John Young to train his warriors in

firearm use and begun conquering some of the neighbouring islands. The British officer and the high chief declared mutual friendship – which, despite some confusion over the nature of the exchange, could be regarded as a form of alliance – and the captain presented Kamehameha with a Union Jack, together with several other uniforms for his retinue. 'From that long-ago time, the Hawaiian people made favorites of the British people,' wrote Hawaiian legend specialist Stephen Desha in *Kamehameha and his warrior Kūka'eapa'a*. 'When children fought with each other, a boy who did not cry was said by the Hawaiians to be a "British boy".'

Of course, the impact of the incursions wasn't as rosy as this 1920s account suggests: ships introduced diseases that proved fatal, as well as insects and invasive plants. Sailors also encouraged prostitution and sometimes took away ancestral works. Yet, in 1810, when the last island, Kauai, submitted to Kamehameha and, in the words of Dr Christophe, 'Hawai'i was propelled into the concert of nations as an equal with a regal figure', Britain was a natural partner and as the newly forged country set out to design its own flag, Ka Hae Hawai'i, it incorporated the Union Jack in the canton. When a ship Vancouver had pledged failed to appear, Kamehameha sent a reminder to George III with an extraordinary present: a red and yellow 'ahu 'ula, the largest-known ancestral feathered cloak in existence. Historically associated with chieftain power, 'ahu 'ula were cut from "incredibly lush velvet," according to Dr Christophe, but were made of hundreds of thousands of feathers, plucked from several different species in the forested uplands. 'It would have taken months, possibly years, for this particular cloak to be made' and it certainly took two more years for it to arrive in Britain. However, its intended recipient was



Fit for a king: the lush 'ahu 'ula Hawaiian cloak, intended as a gift for George III, made using many thousands of feathers

British Museum – Sample Coverage

Q1 ACTIVITY

MEDIA



KAUAI

**NATURE'S ANSWER
TO WELLBEING**

Na'Pali Coast boat trip with Kauai Sea Turtles
I spent 5 hours, which flew by on the oldest family-owned boat your company on Kauai on their newest vessel in their fleet: Lady Kailani, a 65-foot handcrafted luxury catamaran. As we sailed, we saw the awe-inspiring plunging cliff of Na'Pali Coast – a true testament to Kauai's vast volcanic past which by boat you can clearly see what happens internally when a volcano once erupts. A tasty lunch is served onboard, with drinks throughout the day, passes to plunge into the water and swim with tropical fish and sea turtles and we were lucky enough to spot a few of water and the tail of some humpback whale in the distance and delightful dancing dolphins at the base of the boat.

Waimea Canyon State Park

Be sure to take a scenic drive to Waimea Canyon State Park, which overlooks one of the State's treasures – the spectacular gorge of Waimea Canyon. There are ample photo opportunities including a viewpoint of Niihau Island, nothing quite humbles a human being quite like standing among towering canyons. It is a quiet and peaceful place to be mindful.

Wailua River and Fern Grot

boat to go with Smiths Kaula. While on this picturesque boat to traditional singing and even joined on land, we walked through a strike stopping at a special spot along the *Mifama'skaluno*, an area that was associated with agriculture and cul-
important figure in the practices of

KAUAI

THE LOCALS' APPROACH TO FEELING GOOD

Hanapepe Art Night

As it was Friday, we headed to what felt like a massive street party the - Hanafusa Art Night, a weekly, community-driven event bringing people together for fun every Friday from 5pm to 8pm. It was the ideal pit stop before flying home to purchase some local art at one of the many cute art galleries, listening to live music and manching on street food, or you could do as we did and visit Japanese Grandma's for excellent sushi and delicious cocktails and mocktails.



MAUI

THE LOCALS' APPROACH TO FEELING GOOD



Old Lahaina Luau



A wonderful way to feel the roots of Hawaiian culture is to dine at the Old Lahaina Luau, the evening begins with a tribute to the tradition of the pahu (drum) with the compelling o'e's – drum dance of Tahiti. Then kahiko: an ancient hula dance which tells a story about Pele the fire goddess. Then a dancer telling the tale of missionary times when hula was banned but then King David Kalakaua brought it back to his people. Lastly contemporary hula dance is shown with both solo and group performances, all topped off with sharing platters of delicious local fare.

Journey Jill

Jill came to pick us up after we finished feasting on a succupoon, blackened ahi plate (seared ahi, rice, grilled veg and homemade tamazone), just one of the choices from food trucks at Pate Lunch Marketplace, then she staked us off in her 1967 Ford Mustang. The car was around Mass. American born but with a genuine interest in local indigenous culture, she shared instead a knowledge along the way. Highlights included a visit to Waukaha — a place brimming with entrepreneurship from cattle, dog shops selling unique breeds to a local artist who painted and sold art galleries — showcasing Maui's creative resilience. Another stop was to Black Swan Temple Farm and wellness retreat. Heather and her husband Donny have created a healing space nestled in nature. We were given homemade tarot cards, and a small gift of a jar of locally sourced waterfall to take a dip in whenever somers. To end the self-fulfilling garden and took one of their homemade essential oils home, they have also pressed books.



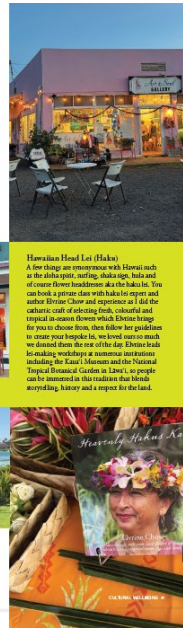
MAUI

WHERE TO STAY

Royal Lahaina

A collection of welcoming accommodation set directly on the pristine Kānaloa Beach - nature is never far, from the Pacific Ocean at your feet, mountains on the horizon and 27 acres of tropical landscape to wander in. Paintings of nature were incorporated into traditional art, flowers in their base, a lot of beads around their necks, are framed on the walls, ratan in flasks reupped with and hibiscus flower and foliage patterned cushions and fan made to local culture such as the cook books on the walls - the raised pinky and thumb of the official Hawaiian hand gesture - the *shaka* - acting as hooks. I couldn't possibly go to Hawaii without having a local loani kani manager and the one I had at this place offered the famed technique of the *moopipi* hand strikes making them feel like a massage, although the perfect way was to use coconut shells rolling all over my body, without any beads, to release tension, remove blockages and left me feeling a deep sense of peace.

www.mysailshades.com



Hawaiian Head Lei (Haku)

A few feelings are synonymous with Hawaii such as the aloha spirit, ʻohana, aloha ʻāina, hula and of course flower headresses like the haku lei. You can book a private day with haku lei expert and author Ebbine Chow and experience as I did the cathartic craft of selecting fresh, colourful and tropical in-season flowers which Ebbine brings for you to choose from, then follow her guidelines to create your bespoke lei, we loved ours so much we donated them the rest of the day. Ebbine leads lei-making workshops at numerous institutions including the Kauri Museum and the National Tropical Botanical Garden in Lāwai*, so people can be immersed in this tradition that blends storytelling, history and a respect for the land.



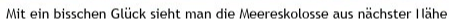
Wailea Beach Resort

Sandwiched between Wailea and Ulu beach, the hotel is ocean facing which made for spectacular views from the balcony of any spacious contemporary ocean and terrace framed room. There are plenty of pools, including the NALU Adventure Pool featuring fun slides for all ages, plus a spa and newly opened Chikino Wellness sanctuary – which I admit, you built to have access to. The wellness sanctuary, I went in the morning and was reclining on an outdoor lounge, enjoying the aromatic, fresh green juice and avocado and eggs on toast – which I never tire of and they were exceptionally good, before taking a dip in the infinity pool. On Saturdays they have music thru and Friday to Sunday neck and shoulder massages, music and more. Dinner in their Humble Market Kitchen was a treat – I had the Hamachi crudo with poke for lunch, picked up an Hawaiian chili pizza and then some *steaky* pig skin, light but flavoured, with a pineapple – tomato, chili, ginger juice, pineapple and brown onion salad on the side.

travelINSIDE Magazine (Trade) / America Journal (Trade) / Neue Westfälische (Consumer)



Pünktlich zur jährlichen Rückkehr der Buckelwale nach Hawaii gibt es neue Angebote für Besucherinnen und Besucher. Auf Maui etwa kann man die Tiere bei einer Sounds-Tour nicht nur sehen, sondern sie dank Hydrophon-Technologie auch hören. Dafür werden die Schallwellen unter Wasser in elektrische Signale umgewandelt. Auf O'ahu wiederum gibt es jetzt auch Bootsfahrten ab dem Waikiki Pier, also ganz in der Nähe der Waikiki Resorts.



LESERREISEN

Auf den ersten Blick wirkt Hawaiis Hauptstadt wie eine normale amerikanische City. Doch inmitten sich wiegender Palmen, exotischer Düfte, weizenblonder Surfer und polynesischen Sanftmuts springt der Aloha-Motor sofort an.

Oh du wunderbarer Tag! Dank der obdunkelten Zeitverschiebung stehe ich schon seit sechs Uhr früh in den Märkten und mache mich bei Einbruch der Dämmerung zu einem Spaziergang durch den Alamo Park auf, gleich neben meinem Hawaii Prince Hotel am südlichen Ende von Waikiki, Hawaii.



Der kornige Wackel ist auch vor dem mächtigen Diamond-Kessel, eingestrichen von den giftigen Kold und Hochhäusern des Wackelenden Wackel.



BUCHEN SIE
JETZT IHRE
REISE NACH
HONOLULU

[illegible][illegible]

besitz wie zum Beispiel Seidwusch
von seinem Gläubiger über Kom-
mission Abbruch hat. Nach immer sel-
teren Fällen der Selbsttötung, wie es
in der Vergangenheit häufiger ge-
schah, ist es nicht mehr notwendig, dass die
Tat und die Entscheidung auf der Basis
des eigenen Willens erfolgt. Die
Viele Töchter haben schon zum Sa-
cken (in der ersten Phase, wie ich
vermutet) das Verlangen nach
Freiheit und Selbstbestimmung.
Dabei kann man die besten Treue
wunderbar beobachten.

Hierbei ist die Frage, ob die
Waise, Waika-Schmuck, entfällt, die

Q1 ACTIVITY **TRADE**

- British Museum 'Behind-the-Scenes'
- Visit USA 'Island Hopping' Trade Event (CH)
- Unite USA (UK)
- Visit USA Webinar (UK)
- Hawai'i Stays With You – Distribution / Training
- 157 Trade Meetings / Discussions
- 7 Trade Education Sessions
- 97 Trade Education Participants

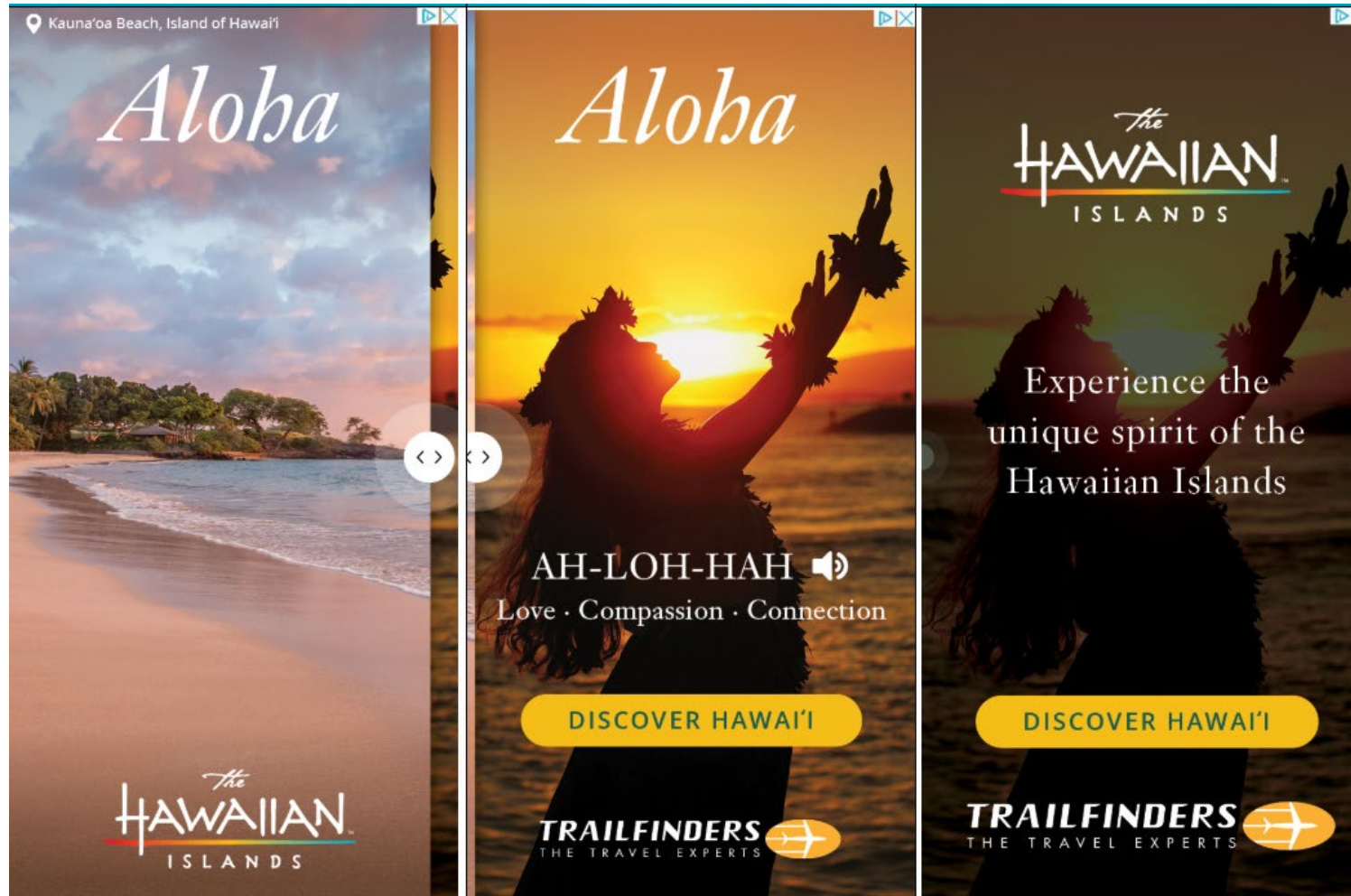


Q2 ACTIVITY CONSUMER

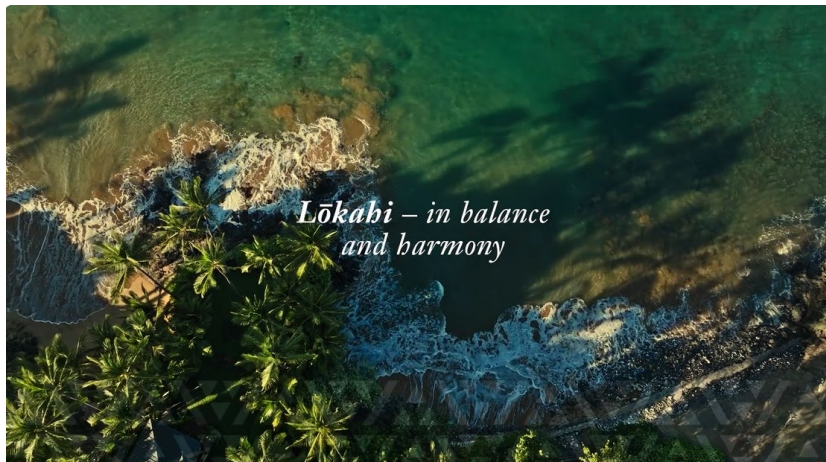
- 'Ōlelo Hawai'i Digital Campaign - UK & DE (March 24 – May 15)
- Emotion-led storytelling woven into display, video on demand and Meta
- Precision-targeted at Ethical Explorers & Wellness Seekers - Culturally curious travellers
- Geo-targeted digital ads building on the British Museum exhibition across the London travel network
- Twin-phase campaign in partnership with Fairflight (DE) and Trailfinders (UK)



Q2 ACTIVITY CONSUMER



Q2 ACTIVITY CONSUMER



Q2 ACTIVITY

MEDIA

- 3 Press Releases
- Media Outreach
- Myself Consumer Magazine (DE)
- Individual Press Trip (UK)
- Visit USA 'Meet the Media' – June 30



Q2 ACTIVITY **TRADE**

- Post-Peak – Training / Product Focus (UK/DE)
- Pan European FAM (Maui & Kaua'i) – April
- Lusso Luxury Showcase (UK) – June
- Visit USA Summer Affair (UK) – July



PARTNER OPPORTUNITIES



Key Contact: Amy Thomas (Europe) – amy@hawaiiourismeurope.com

Trade Training: Fleur Sainsbury (UK) – fleur@hawaiiourismeurope.com
Julia Rohrbacher (DE/CH) – julia@hawaiiourismeurope.com

PR: Joanna Cooke (UK) – joanna@hawaiiourismeurope.com
Sabrina Hasenbein (DE/CH) – sabrina@hawaiiourismeurope.com

Mahalo nui loa!

