



FY26 Strategic Plan

Prepared by
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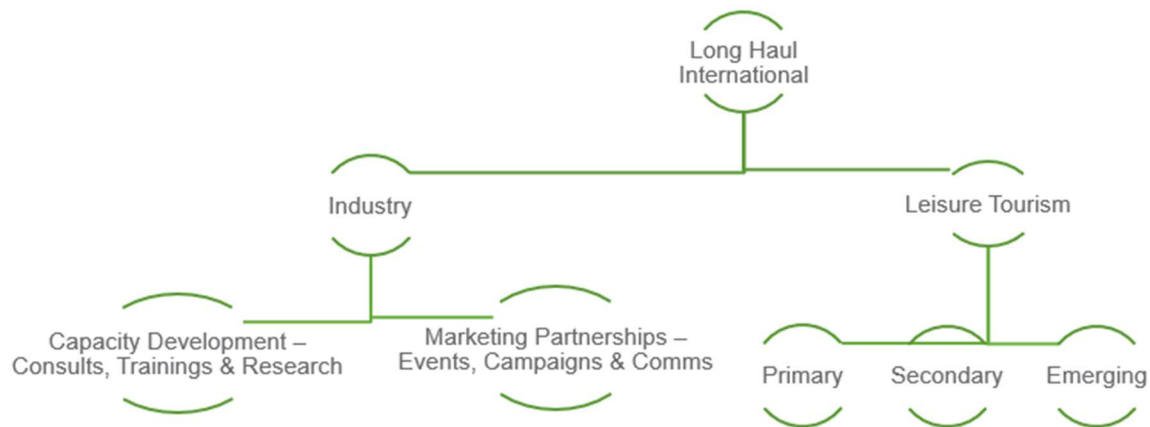
About

Discover New England (DNE) is a regional destination marketing organization founded in 1992 by the six New England state tourism offices. DNE is a nonprofit (501c6) association dedicated to promoting travel to and within the member states of Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont.

Goal

To increase international visitation to the New England region and support the region's tourism economy by promoting the six states as a unified destination to international travelers.

Overview



Industry

Discover New England creates education opportunities and coordinates capacity building initiatives with New England suppliers (hotels, attractions, experiences, transportation, DMOs, etc) for the international market by informing of the latest research and policies impacting the industry, hosting trainings, and creating marketing and messaging opportunities for SMEs to elevate their own brands to international audiences.

Leisure - Trade & Consumer

Primary Markets: Under the direction of the six New England states, DNE's approach is **80% B2B**, targeting members of the travel trade and media, and **20% consumer** targeting. DNE's primary markets are the UK and Germany with a goal of maintaining and defending market share. Ireland is a subcontract of the UK representation and has reduced deliverables, and Austria and Switzerland fall within the German contract purview:

The current approach for primary markets is for DNE to hire full year, in-market representation on retainer to implement:

- 30-50 training and sales calls annually.
- Manage and maximize DNE's membership with VisitUSA Committees.
- Negotiate and manage pay-to-play joint marketing and general media buys for DNE either direct or with BrandUSA.

- Secure, manage and escort a trade delegation for the DNE Summit.
- Support DNE's appointment scheduling at key trade shows (IPW/BUSATW).
- Plan and escort an annual DNE sales mission.
- 20-30 media pitches and calls annually.
- Clipping service.
- Post socially and distribute newsletters (sometimes create newsletters 4x annually with translation).
- Ongoing availability to assist with trade and media inquiries on behalf of DNE.

Secondary Markets: France, Italy, the Netherlands, Belgium and Japan. Current activities for secondary markets include:

- Training for tour operators and agents during high attendance events and on a request basis.
- Secure, manage and escort a trade delegation for the DNE International Marketplace.
- Additional projects as approved by the board.

Emerging Market: Continue with year 2 of the 3-year commitment in Mexico City as part of a partnership with Meet Boston. The goal is to establish New England as a destination with key channel partners in order to open up the greater Latin American market. Mexico City is a cost-effective target area due to the concentration of wealth, the high number of multinational travel company headquarters and the effectiveness of the multinational media based there.

The plan includes hiring in-market representation to coordinate media and trade outreach, conduct trainings, bring A-list media to New England, facilitate joint marketing campaigns with key tour companies and to host a sales mission in Mexico City for a delegation of New England tourism industry businesses.

Mexico was selected as an emerging market with the assistance of the USA Dept of Commerce International Trade Administration which conducted a RAISE Matrix Study with Discover New England in 2023. Mexico has a large number of active tourist visa holders, has a consistently growing middle and upper class, is a gateway to many multinational companies, has strong interest in cultural and outdoor recreation experiences, and is known to travel throughout the year. Additionally, Mexico has a very healthy and lucrative economic trade relationship with New England businesses and an impressive volume of existing education travel as well.

New for FY25

It has been helpful for DNE to reserve a certain amount of capital from year to year for one-time projects. In FY2023, DNE contracted with Yankee to produce a translated regional Visitors Guide due to the lack of existing messaging materials available. In fiscal 2024, DNE launched a training series in partnership with IITA due to the severe shortage of product available in international channels and commissioned 12 suggested itineraries. In fiscal 2025, DNE set aside a Secondary Market Training Fund which was used to conduct trainings in a number of markets and launched a Strategic Planning project with tourism experts Miles and Coraggio. All projects were successful and were essential building blocks for DNE's growing success today. In the future, DNE may need to invest in various projects such as updating its guide and itineraries, enhancing its BrandUSA microsite, commissioning for short video, ordering display, or looking at a brand refresh.

DNE continues to evolve as an organization as it responds to markets and prepares itself for the future. In FY2026, DNE will implement the following projects:

- **Secondary Market Training Fund with a focus on Japan.** There is still an immediate, short-term need for training due to new staff and new product demands in New England's secondary markets. Japan has the strongest need for training as their USA travel is still rebounding from the global pandemic.

- **Pilot Eastern Townships Partnership.** DNE has interest from the Eastern Townships of Quebec in collaborating on creating one or more bookable itinerary and an activation targeting European FIT. DNE feels that this would be beneficial in a number of ways including demonstrating our close relationship with our neighbors to the north, how easy it is to access New England from Quebec, and would help to stimulate awareness and demand for rural areas of northern New England.
- **Pilot Media FAM Fund.** It is becoming increasingly difficult to find outside funding for the most qualified media. Many publications are shifting to freelancers to downshift costs, airlines policies are becoming more restrictive, and BrandUSA funding is in jeopardy. In order to ensure New England is not passed up for assignments, DNE will create a small fund to cover airline and car rental only after all over other options for covering these expenses have been exhausted. DNE will attach a restrictive policy for use of this fund to ensure that coverage is equitable and meets the expectations of the assignment.

How International Channels Work

New England's calendar year 2024 top 10 long haul international markets (not including Canada) ranked based on volume are: UK, India, China, Germany, France, Brazil, Mexico, Italy, Korea, and Spain. The chart below shows volume for calendar year 2024 into New England and forecasted growth through 2026 based on Tourism Economics data.

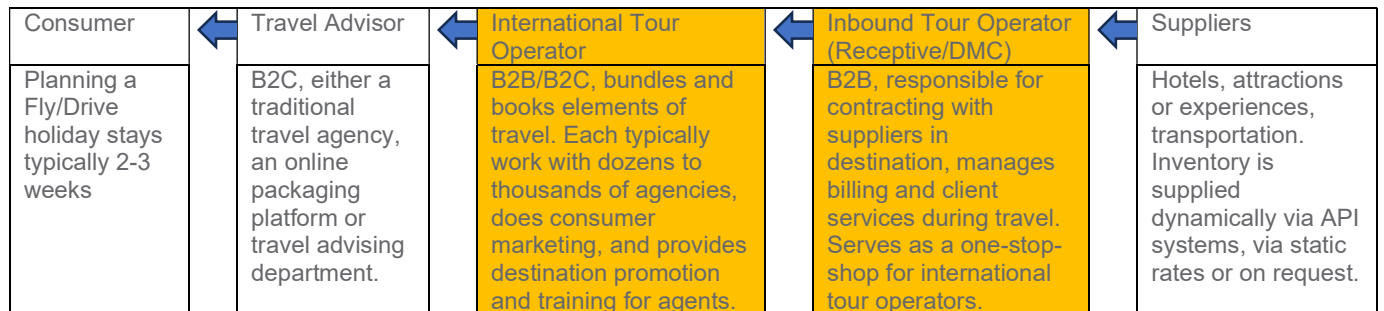
The region was forecasted to have record-breaking arrivals in 2025; however, federal policy has created instability in USA arrivals as a whole. At the time of this report, it is unknown how much of the change in arrivals is a short-term reaction vs lasting impact.

| DNE's Primary & Emerging Markets | Calendar Year 2024 Volume (YOY % change) | Forecast CAGR through 2026 if all remains constant |
|----------------------------------|--|--|
| Total Overseas | 1,954,000 (+13.3%) | 0.1% |
| UK | 245,082 (+1.4%) | -1.7% |
| Germany | 134,219 (+12.6%) | -4.7% |
| Ireland | 57,600 (+3.3%) | 1.2% |
| Mexico | 72,814 (+19.2%) | -2.0% |

For New England specially, 2024 was a record year for spend by long-haul international markets at an average of more than \$2,500 per person, per trip. It far exceeds the domestic pp/pt spend of \$250 and the Canadian of pp/pt spend of \$500.

Why B2B

The vast majority of international inbound to the United States originates from B2B distribution channels as opposed to domestic travel that commonly book direct or through online travel agencies. B2B channels are even more prevalent when planning holidays to fly/drive destinations such as New England in comparison to cruise or all-inclusive beach stays. Most leisure travel to the United States are FIT, which stands for Foreign Independent Travel comprised of couples, friends and families; however, many operators also have group and corporate services. The B2B Distribution Channel works like this:



Trade & Consumer

| Objective | Tactic | Tools |
|--|---|--|
| 1. Improve travel offerings to New England sold by tour operators. | <ul style="list-style-type: none"> ▪ Calls, training & consults. ▪ Engage trade media for editorial and webinars. ▪ Offer ways to visualize or experience New England. | <ul style="list-style-type: none"> ▪ Market Reps. ▪ WanderMap & Itineraries. ▪ FAM Tours. ▪ Crowdriff Media Hub and Galleries. ▪ Trade/Media Newsletter. ▪ Summit, IPW, Sales Mission. |
| 2. Inspire tour operators to begin selling/promoting New England and/or to increase dispersal seasonally and geographically. | <ul style="list-style-type: none"> ▪ Calls, training & consults. ▪ Offer ways to visualize or experience New England. | <ul style="list-style-type: none"> ▪ Market Reps. ▪ WanderMap & Itineraries. ▪ FAM Tours. ▪ Crowdriff Media Hub and Galleries. ▪ Visitor Guide. ▪ Summit, IPW, Sales Mission & other trade shows. |
| 3. Support consumer demand for travel agencies and tour operators while strengthening trade relationships. | <ul style="list-style-type: none"> ▪ Consumer marketing. ▪ Media targeting. | <ul style="list-style-type: none"> ▪ Joint marketing campaigns with influential tour operators. ▪ BrandUSA digital optimized campaigns and affinity programs. ▪ Trade Kit (in development). ▪ BrandUSA Consumer Subsite. ▪ Visiting journalist program. ▪ Market rep media pitching & editorial. |

Tools Performance Goals/KPIs

Market Rep Outreach

- Market reps serve as an extension to DNE who have the direct relationships and trust of trade and media in their countries. DNE uses these reps to maintain and increase awareness of the destination. The main goal is consistency in market so DNE would like to see UK/IR and Germany reps *maintain outreach activity to trade and media at about 30-50 trade calls annually with the goal of relations and the same volume for media with the goal of generating articles with influential reach (about 500 million annually per market).*

FAM Tours

- Due to low supplier participation by partners (hotels and attractions) in this program and the reluctance of states and regions to host when media need to come for optimal photography (summer/fall) and low season for product development managers (Sept/Oct), DNE will enforce more strict FAM policies requiring greater reach. *Success for this program will be to welcome 2-3 high profile media FAMs per primary market who generate articles that feature New England (all six states or as many states as possible) as one destination.* All FAMs are qualified by market reps and accepted by host states.

Trade Shows, Sales Missions and DNE Summit

- DNE has prioritized its travel to the most effective shows that have the least amount of cross-over in order to be conservative with travel budget and staff time out of the office. These shows are IPW and BrandUSA Travel Week. Additional shows may be brokered by DNE on behalf of pay-to-play participants from the states and industry with recent examples being Holiday World Showcase and the Aer Lingus Road Show. Sales Missions are the most effective way of building rapport with target media and trade in-market in which DNE hosts two: the UK + Ireland and German-speaking countries. Summit is an effective way for operators to see our region for themselves and to meet with more suppliers in one place. *The main goal of these programs is to maintain full schedules of meetings and have sell-out participation by partners and states.*

Campaigns & Consumer Subsite

- BrandUSA campaigns (optimized via Expedia, social, digital and retargeting) drive awareness in market. *Indicators of success of this program are campaign impressions exceeding 8.5M and clicks to the Discover New England subsite exceeding 10K.*
- DNE uses the BrandUSA LOA to expand its budget of \$50,000 to run joint marketing advertising and campaigns with tour operators negotiated by in-market reps. These are referred to as general media buys. These serve the same goal as above of generating consumer awareness but they also serve the goal of driving that demand to New England product hosted by members of the travel trade. *DNE aims to rotate out the buyers they engage with on these campaigns and seeks proposals that include expanding product offering and lasting content and that utilize a mix of media. Not all buyers report out bookings data so impressions are the most consistent indicator of performance. Not all campaigns have the same target as some are travel agent audiences only, others are consumer and others have a mix. Ideal consumer targeting should exceed a million impressions and trade more than 5,000.*

Media Hub

- This is a tool to support both trade and media with free and easy to use imagery and video. While it is important to have available, its engagement is not necessarily the most important outcome. The user count is a better indicator which began 2024 with 30 accounts. These include tour operators such as Salt & Green (luxury), Saga (group), Origin, Frontier Travel, go2travel, NATS, Enjoy Vacations, CRD and more. Media include Falstaff Verlags and multiple freelancers who are known to publish in significant publications. *Success would be to increase the amount of video and high-res photography and then double the amount of trade and media accounts on this platform in 2026.*

Maps & Galleries

- While these tools are designed to inspire travel for trade and media, both are frequented organically by consumers so it is virtually impossible to differentiate. *DNE's would like to see ongoing increasing visits to both tools as more content becomes available. Currently, both tools receive a few hundred visits and views each month.* Their primary function to serve as sales tools when speaking with or in follow-up with media and trade as part of direct outreach by DNE and its reps; therefore, they are support tools that provide more content available for messaging and sales processes.

Digital Guide & Individual Expanded Articles on discovernewengland.org

- Like mapping and galleries above, this is an inspiration tool that provides content and context for DNE when educating those not so familiar with the destination and to provide content for newsletters. Success is not categorized by high visitation numbers as this is a support tool. Unfortunately, DNE cannot see reports of who downloads the guide. Also, like above, the guidebook may be frequented by consumers organically. In addition to being a support tool, this tool does provide the simplest pathway for displaying and promoting its Partners in the Partner Program. *DNE will support with digital campaigns in travel trade media overseas driving visitation to the guide with the goal of increasing views and clicks on Partner advertisements.*

Trade/Media Newsletter

- This is a brand-new tool that DNE has started to communicate directly to trade and media in addition to communicating through its reps. This is most important so that DNE can reach its secondary markets and others who DNE has met at trade shows along the way or who have subscribed directly via the website. It is a way to share out new itineraries, galleries New England news and individual Partner branding to a wider audience so that New England doesn't fall off the radar. *The goal is to gradually increase the subscriber base organically. The open rates are a good indicator of interest. The current subscriber base is just over 300 trade/media with an additional 2,500 on the redistribution list by DNE's reps.*

Trade Kit Videos (on website and dropbox)

- Previously, DNE compiled partner profiles and a handful of PDFs for itineraries and news into a file share compilation of links via email as the press/trade kit (including the newsletter subscriber link, the media hub, thematic trails maps & galleries, the visitor guide, the what’s new roundup, the general training powerpoint, and the 30/60 second video spots). Moving forward and in response to more and more tour operators launching online, password protected training hubs for agents and staff, DNE will collect video shorts as recorded Zoom presentations by states and members of the Partner Program and make these videos available for download and sharing on these training platforms. DNE will create video shorts on new itineraries to give a visual overview of the PDF pieces.

Industry

| Objective | Tactic | Tools |
|--|--|--|
| 1. Educate industry on trends, strategies, and tools for better reaching and serving international visitors. | <ul style="list-style-type: none"> ▪ Create a schedule of educational opportunities involving industry experts in their fields. ▪ Compile resources and slides in a downloadable/sharable format. | <ul style="list-style-type: none"> ▪ IITA training and Zoom Webinars. ▪ Industry resource section of website. ▪ LinkedIn. |
| 2. Create pathways for the industry to elevate their brands internationally. | <ul style="list-style-type: none"> ▪ Maintain the Valued Partner program. ▪ Host pay-to-play travel opportunities. ▪ Feature specific businesses throughout the region in various creative and messaging tools. | <ul style="list-style-type: none"> ▪ Offer varying sizes of pay-to-play marketing packages. ▪ Crowdriff Media Hub & Galleries. ▪ WanderMap & Itineraries. ▪ Digital Guide. ▪ DiscoverNewEngland.org media/trade section. ▪ Trade Kit (in development). ▪ Summit, Sales Missions and trade shows. ▪ Facebook & Instagram. |
| 3. Maintain and grow participation by industry partners in export channels. | <ul style="list-style-type: none"> ▪ Advocate through state and local DMO partners. ▪ Attend local events. | <ul style="list-style-type: none"> ▪ Speaking engagements. ▪ Announcement redistribution. ▪ Governors Conferences and annual chamber events. ▪ Testimony. |

Tools Performance Goals/KPIs

Education Program: Trainings & Webinars

- DNE has hosted a handful of webinars including those explaining the international market, presenting research and perception studies and market trends. These offerings will be expanded to include topics such as technology in international channels, sustainability, and accessibility as it pertains to international audiences. Any expenses in the Education Program are to be fully supported by revenue raised by the Partner Program. Both programs are to be fully designed and managed by the Director of Product & Sales. *Successful events will have at least 30 participants encompassing partners from all six states.*

Industry Resource Section on discovernewengland.org

- The majority of the content and top menu items are designed for New England industry partners and is a place to make recordings and slides of past presentations available and easily shareable and to link to research resources and documents explaining best practices in the industry.

LinkedIn and Social Media

- LinkedIn is a platform for DNE to share its activities and announcements with industry partners. This program is passively maintained at the moment.
- Facebook/Instagram has been demoted in function and purpose for DNE because the audience is outside of DNE's target audience. Other than international ad placement by BrandUSA, DNE uses this platform passively to share imagery and to share individual posts by DNE's Valued Partners.
- Success for these platforms is to merely show activity often enough to validate the organization.*

Partner Program: Pay-to-Play Marketing Packages

- Packages can be as simple as basic listings to as full as having expanded content, imagery, communication features, full lead reports and more. They are renewed on a rolling basis. The program is fully designed and managed by the Director of Product and Sales. Revenue from the program may be used to reinvest into driving traffic to the partners directly and to the Education program. *The goal of the program is to maintain steady engagement with the partners to elevate their branding with international audiences directly. Success is having partners in all six states, a 90% retention rate and adding 10 new partners annually.*