



FY27 Strategic Plan

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Discover New England

www.DiscoverNewEngland.org

About Discover New England

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 (501(c)(6)) association dedicated to promoting travel to and within its member states: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont.

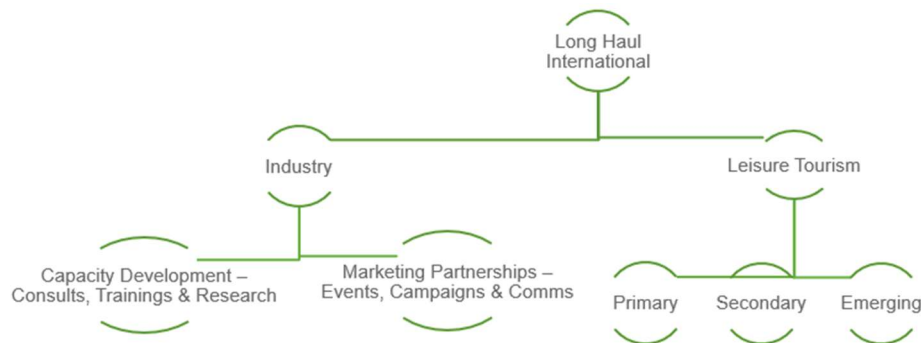
Goal

To develop and strengthen New England as a four-season tourism destination for long-haul international markets.

Vision

To be the leading international marketing voice for New England, uniting the region through collaborative storytelling, trade partnerships, and destination education that drives global visitation and supports local economies.

Overview



Reflection on FY26

FY26 was another rollercoaster year, marked by fast-moving changes in federal policy affecting trade, TSA services, and funding to states and to Brand USA — all of which fueled fears of market instability. Despite these headwinds, tourism exports to New England proved resilient. In calendar year 2025, spending by overseas travelers rose 0.5%, exceeding 2019 levels, even as arrivals fell 3% off a strong prior growth year. The UK and Brazil were up slightly year-over-year, while arrivals from Mexico and Italy rose significantly. On a fiscal-year basis, FY2026 arrivals were flat versus FY2025 while spending rose 1.6%.

Industry

Discover New England creates education opportunities and coordinates capacity-building initiatives with New England suppliers — hotels, attractions, experiences, transportation providers, and DMOs — for the international market. DNE keeps the industry informed of the latest research and policy developments, hosts

trainings, and creates marketing and messaging opportunities that help SMEs 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 with reduced deliverables, and Austria and Switzerland fall within the German contract's purview.

DNE hires full-year, in-market representation on retainer in its primary markets 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 Brand USA
- 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, plus a clipping service
- Post socially and distribute newsletters (4x annually, with translation)
- Provide 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

Since FY2025, DNE has set aside flexible funds for opportunities in secondary markets. This has funded staff trainings for Cercle Des Voyages et Visiteurs in France, multiple destination trainings in Tokyo, a contract with Global Consulting to manage DNE's VisitUSA membership for Japan, participation in in-person destination trainings with Joker Reisen in Belgium, and dedicated VisitUSA webinars for Italy. In FY2027, these funds will support expanded training in Japan and a greater focus on the Belgium and Netherlands markets, both of which are rapidly expanding their New England product.

Emerging Market: Mexico

DNE will continue in Mexico in partnership with Meet Boston, with the goal of establishing New England as a destination with key channel partners across the greater Latin American market. Mexico City is a cost-effective

target area given its concentration of wealth, its high number of multinational travel company headquarters, and the reach of the multinational media based there.

The plan continues in-market representation with Another Co., whose contract commenced in April 2026, to manage Mexico media and trade outreach, conduct trainings, bring A-list media to New England, and facilitate joint marketing campaigns with key tour companies.

Mexico was selected as an emerging market with the assistance of the U.S. Department 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, a consistently growing middle and upper class, strong ties to multinational companies, strong interest in cultural and outdoor recreation experiences, and a tendency to travel year-round. It also has a healthy, lucrative economic trade relationship with New England businesses and an impressive volume of existing education travel.

Changes for FY27

Task Force Facilitator to Manage Committee on Strategic Plan

DNE will hire a third-party facilitator to manage a task force of nominated industry leaders charged with discussing how the strategic plan created by Miles/Coraggio should be implemented. Focus areas include identifying emerging markets, improving inter-state forums and engagement, and assessing funding models.

Video Content

With growing demand for short-form video, and DNE's existing footage now 14 years old, DNE will broker a cooperative package for state buy-in with a local production company to film in each participating state and deliver full usage rights with no credit requirements or expiry.

Sentiment Study

DNE will advance a sentiment study of the UK, Ireland, and Germany with research firm Longwoods. The goal is to understand what travelers really think of New England — both those who have visited and those who have yet to come — not to measure intent to travel. The findings will inform future campaigns, content, and messaging.

Continue Southern Quebec Collaboration with Media FAMs — and Launch a New Program Using this Model

Building on the interest this collaboration has generated, the next step is to invite specific operators and media for FAMs. Southern Quebec will match DNE resources to support airline and ground transportation costs through our region for qualified UK media.

Expand Day 1 of Summit

DNE will expand Summit to better serve tourism SMEs throughout New England with additional speakers, more networking, a keynote luncheon, and a new registration category and appointment session specifically for

Media, Tech, and Services. This expansion will bring added costs, to be funded through the Member Program and Summit registrations.

The Opportunity

New England's top 10 international markets in calendar year 2025, ranked by volume and not including Canada, were: UK, India, China, Germany, Brazil, France, Mexico, Italy, Spain, and Korea. The table below shows calendar-year 2025 volume into New England and forecasted growth through 2027, based on Tourism Economics data, for the markets in which Discover New England has full-year representation.

Market	CY2025 Volume	Change from Prior Year	Change from 2019	3-Yr Forecast CAGR (2025–2027)
Total Overseas	1,935,953	-3.0%	-27.8%	+4.5%
UK	255,083	+1.1%	-29.2%	+3.8%
Germany	121,611	-11.5%	-19.0%	+4.7%
Ireland	59,800	Flat	+1.9%	+5.0%
Mexico / Fly	79,148	+8.5%	+27.0%	+2.4%

Total Overseas excludes Canada and Mexico. Mexico/Fly had no representation prior to 2023 and was newly added in 2024.

International inbound travel is an export, and overseas visitors are essential to New England's economy. In 2025, this segment spent an average of \$2,843 per person per trip in New England, compared with \$500 per person per trip from Canadian arrivals, who make up 38.8% of international arrivals to the region. Overseas visitors directly support more than 700,000 jobs in the United States and stay an average of 18 nights. (Source: U.S. Travel Association.)

The Difference

The vast majority of international inbound travel to the United States originates through B2B distribution channels, unlike domestic travel, which is commonly booked direct or through online travel agencies. B2B channels are even more prevalent for fly/drive holidays like New England than for cruise or all-inclusive beach stays. Most leisure travel to the United States is FIT (Foreign Independent Travel) — couples, friends, and families — though many operators also offer group and corporate services. The B2B distribution channel works as follows:

Consumer	Travel Advisor	International Tour Operator	Domestic Inbound Receptive Operator	Suppliers
Plans a fly/drive holiday, typically 2–3 weeks.	B2C — a traditional agency, online platform, or advising department. Sources product from international tour operators.	B2B/B2C — bundles and books travel elements. Works with dozens to thousands of agencies; provides consumer marketing, destination promotion, and agent training.	B2B — contracts with in-destination suppliers, manages billing and client services. A one-stop shop for international tour operators.	Hotels, attractions, experiences, and transportation. Inventory supplied dynamically via API or static rates for packaging; may require allocation or by-request bookings.

Discover New England's Approach

B2B distribution channels thrive on professional relationships between channel partners. Discover New England directs about 80% of its marketing resources toward trainings, tools, and outreach to B2B and B2C tour operators, who in turn reach thousands of travel agents. The remaining 20% of DNE's marketing dollars fund consumer targeting through strategic partners such as Brand USA and in-market media.

Media, Trade & Consumer

Objective	Tactic	Tools
1. Improve travel offerings to New England sold by tour operators.	● Calls, training & consults ● Engage trade media for editorial and webinars ● Offer ways to visualize or experience New England	● 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 increase seasonal and geographic dispersal.	● Calls, training & consults ● Offer ways to visualize or experience New England	● 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.	● Consumer marketing ● Media targeting	● Joint marketing campaigns with influential tour operators ● Brand USA digital optimized campaigns and affinity programs ● Trade Kit (in development) ● Brand USA Consumer Subsite ● Visiting journalist program ● Market rep media pitching & editorial

Tools, Performance Goals & KPIs

Market Rep Outreach

Market reps extend DNE's reach, bringing direct relationships and trust with trade and media in their countries. DNE uses these reps to maintain and increase destination awareness. The main goal is consistency in market, so DNE would like UK/Ireland and Germany reps to *maintain outreach activity to trade and media at about 30–50 trade calls annually, with a comparable volume for media aimed at generating articles with influential reach (about 500 million annually per market).*

FAM Tours

Given low supplier participation from partners (hotels and attractions) and the reluctance of states and regions to host during the windows when media need to visit for optimal photography (summer/fall) versus the low season for product development managers (Sept/Oct), DNE will enforce stricter FAM policies requiring greater reach. *Success for this program means welcoming 2–3 high-profile media FAMs per primary market that generate articles featuring New England — all six states, or as many as possible — as one destination.* All FAMs are qualified by market reps and accepted by host states.

Trade Shows, Sales Missions, and DNE Summit & Marketplace

- DNE prioritizes travel to the most effective shows with the least overlap, to stay conservative with travel budget and staff time out of office. These are IPW and Brand USA Travel Week. Additional shows may be brokered by DNE on behalf of pay-to-play participants from the states and industry, with recent examples including the Holiday World Showcase and the Aer Lingus Road Show.
- Sales missions are the most effective way to build in-market rapport with target media and trade. DNE hosts two annually: UK + Ireland, and Italy.

Annual Summit & Marketplace gives operators a chance to see the region firsthand and meet more suppliers in one place. This year's conference runs March 8–10, 2027 at Foxwoods Resort Casino in Connecticut, hosting about 70 operators and reps from more than a dozen countries for pre- and post-event FAMs, evening events, pre-scheduled appointments, and networking. About 200 hotels, attractions, and DMOs from all six states will attend educational sessions and speakers, meetings with tech and consulting firms, pre-scheduled meetings with international operators, and a state evening hosted by Connecticut. *The main goal of these programs is to maintain full meeting schedules and sell-out participation by partners and states.*

Campaigns & Consumer Subsite

- Brand USA campaigns — optimized via Expedia, social, digital, and retargeting — drive in-market awareness. *Success indicators are campaign impressions exceeding 8.5M and clicks to the Discover New England subsite exceeding 10K.*
- DNE also runs joint marketing campaigns with tour operators, negotiated by in-market reps (general media buys). These build consumer awareness while driving demand to New England product hosted by travel trade members. *DNE aims to rotate the buyers it engages and seeks proposals that expand product offerings, deliver lasting content, and use a mix of media. Not all buyers report bookings data, so impressions remain the most consistent performance indicator; targets vary by audience, but ideal consumer targeting should exceed one million impressions, and trade more than 5,000.*

Media Hub

This tool supports trade and media with free, easy-to-use imagery and video. While availability matters, engagement isn't the primary measure of success — user count is a better indicator. Users include tour operators such as Salt & Green (luxury), Saga (group), Origin, Frontier Travel, go2travel, NATS, and Enjoy Vacations, CRD, and others, along with media such as Falstaff Verlags and multiple freelancers known to publish in major outlets. *Success means growing the volume of video and high-resolution photography, and doubling the number of trade and media accounts on this platform in 2027.*

Maps & Galleries

These tools are designed to inspire trade and media, though both are also visited organically by consumers, making the two audiences difficult to distinguish. Their primary function is as sales tools for direct outreach and follow-up by DNE and its reps, providing content that supports messaging and sales. *DNE would like to see steadily increasing visits to both tools as more content becomes available; currently, each receives a few hundred visits and views per month.*

Digital Guide & Expanded Articles on discovernewengland.org

Like the maps and galleries, this is an inspiration tool that provides content and context for educating audiences unfamiliar with the destination, and material for newsletters. Success isn't measured by high visitation, since this is a support tool, and DNE cannot currently see who downloads the guide. Like the tools above, it may also be visited organically by consumers. It also offers the simplest pathway for displaying and promoting Partner Program members.

Trade/Media Newsletter

DNE uses this tool to communicate directly with trade and media, supplementing outreach through its reps. It is especially important for reaching secondary markets and other contacts met at trade shows or who subscribed directly via the website — sharing new itineraries, galleries, New England news, and individual Partner branding with a wider audience so New England stays top of mind.

Industry — Objectives & KPIs

Objective	Tactic	Tools
1. Educate industry on trends, strategies, and tools for better reaching and serving international visitors.	● Create a schedule of educational opportunities involving industry experts in their fields ● Compile resources and slides in a downloadable, sharable format	● IITA training and Zoom webinars ● Industry resource section of website ● LinkedIn ● Industry newsletter, including quarterly market update reports ● Password-protected member portal
2. Create pathways for industry to elevate their brands internationally.	● Maintain the Valued Partner program ● Host pay-to-play travel opportunities ● Feature specific businesses across creative and messaging tools	● Pay-to-play marketing packages, varying sizes ● 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.	● Advocate through state and local DMO partners ● Attend local events	● 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 covering the international market, research findings, and perception studies and market trends. These offerings will expand to include topics such as technology in international channels, sustainability, and accessibility for international audiences. Any Education Program expenses are fully supported by revenue raised through the Partner Program, and both programs are designed and managed by

the Director of Product & Sales. *Successful events will each draw at least 30 participants representing all six states.*

Industry Resource Section on discovernewengland.org

Most of the content and top menu items are designed for New England industry partners, offering a place to access recordings and slides from past presentations and to link to research resources and best-practice documentation.

A password-protected Member Portal offers ongoing access to current leads from tour operators and media, plus the research dashboard powered by Tourism Economics.

LinkedIn and Social Media

- LinkedIn is where DNE shares 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, since the audience there falls outside DNE's target audience. Aside from international ad placement by Brand USA, DNE uses this platform passively to share imagery and Valued Partner posts.
- *Success on these platforms simply means showing activity often enough to validate the organization's presence.*

Member Program: Pay-to-Play Marketing Packages

Packages range from basic listings to full packages with expanded content, imagery, communication features, and full lead reports. They renew on a rolling basis and are designed and managed by the Director of Product and Sales. Program revenue may be reinvested into driving traffic to partners directly and into the Education Program. *The program's goal is steady partner engagement that elevates their branding with international audiences. Success means having partners in all six states, a 90% retention rate, and adding 10 new members annually.*