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DEAR FRIENDS OF NEW ENGLAND,

I am pleased to present Discover New England’s annual report for July 2017 to June 2018. Founded in 1992, Discover New England is a nonprofit cooperative destination marketing organization with the sole mission of promoting New England internationally. In partnership with five state tourism offices, we are able to help the New England travel and tourism industry reach the global market and attract new and repeat international visitors.

Working directly with travel trade professionals, we promote the New England tourism product while providing our regional suppliers with the tools and education they need to compete internationally. DNE helps to ensure that New England’s tourism offerings appeal to international consumers and travel planners by connecting the industry with the latest research, educational tools and travel trends. Using research firm, Travel Market Insights, we’re able to gather all the pertinent data that our industry will need to make educated decisions when marketing to the international visitor.

Discover New England also offers access to an extensive network of industry contacts in New England and abroad. We work directly with U.S. receptive operators, group tour operators, travel agencies, online booking agencies, and international travel and lifestyle media to provide them with new trip ideas, regional offerings and enhancements to their existing trips, as well as marketing tools to promote New England travel.

Our primary organizational goal is to be positioned as the premier resource for reaching key international markets for New England–based state tourism offices, regional tourism organizations and tourism suppliers. The following report will give you an understanding of DNE’s key target markets, consumer trends and behaviors, details on each country’s economic status, and an overview of how international travelers interact with the U.S. market.

Best wishes,

Lori Harnois
Executive Director
Discover New England’s board of directors is comprised of the tourism directors from five New England states. The headquarters is located in Portsmouth, New Hampshire, USA, where three staff members develop, direct and oversee all of the day-to-day activities. Ongoing, face-to-face contact with the international travel trade industry is ensured by Discover New England’s representative offices in the United Kingdom, Ireland, Germany, Scandinavia, Japan and Australia/New Zealand.

**Board Chair:** Randall Fiveash, Connecticut  
(January 2017 – present)

**Treasurer:** Mark Brodeur, Rhode Island

**Secretary:** Victoria Cimino, New Hampshire

**Member:** Francois-Laurent Nivaud, Massachusetts

**Member:** Steve Lyons, Maine  
(January 2017 – present)

### MAJOR ACCOMPLISHMENTS

2017/2018

- Launched new branding elements for the organization
- Expanded the industry education page on our website, adding valuable resources for our suppliers
- Hired in-country representation in Scandinavia and Ireland
UK
CONSUMER TRENDS & BEHAVIORS

UK residents made 71 million trips overseas in 2017 despite uncertainty created by world events, political upheaval and economic pressures. Although there is continued pressure on consumer spending power, ABTA research shows a notable increase in people planning to spend more on their holidays in the next 12 months. Over three in ten people (31%) plan to spend more, compared to 24% who stated this in 2016, with only 14% of people planning to spend less.

- Holidaymakers responded in 2017 by trying somewhere new, with over a quarter (27%) planning to visit a country they've never been to before and almost a third (32%) expecting to experience something unique.

- City Breaks were the nation’s favorite holiday in 2017 with over half the population taking one according to ABTA research.

- Early bookings for overseas holidays were strong for 2018, with industry figures showing bookings for summer tracking 5% above last year. This may reflect the growing trend for early booking, with people keen to secure their preferred resort or destination in an increasingly competitive market.

- According to the Travel Insight Survey of 25,000 UK travelers (Association of Independent Tour Operators), British holidaymakers are getting much more active on holiday, with beach breaks being overtaken in popularity by wildlife and walking holidays. Short city breaks are preferred, too.

- For 2018 there’s a clear trend towards discovery, especially places that were either relatively unknown or more difficult to access.

- Package holidays remain the single most popular booking option for foreign holidays, with over half (51%) of people taking one in the past 12 months. One of the main reasons for choosing a package is because it provides ‘the best value option for price’, and 2018 should see this trend continue as people look for options where they can plan ahead on a fixed budget. This will be particularly important in light of political and economic uncertainty, as holidaymakers look to protect themselves against likely currency fluctuations.

- According to the International Passenger Survey, the residents of UK prefer July and August for travel abroad mainly due to the long school holidays. Other popular months are April, May, June, October and November. January to March is a popular time for single-week ski trips and winter sun breaks to inexpensive destinations, usually as an extra holiday.
Global political and economic uncertainty, a heightened terror threat and natural disasters impacting some well-known tourist destinations were never far from the headlines. We saw terrorist attacks in Manchester, London and Barcelona, political unrest in The Gambia, a devastating earthquake in Mexico and Hurricanes Harvey, Irma and Maria impacting Texas, Florida and the Caribbean.

The Brexit negotiations continued to dominate the news, but the fall in the value of the pound did not appear to put people off holidaying in Europe in 2017. The EU remains the UK’s largest travel destination and consumer confidence in travel to EU destinations has held up well.

Relatively high disposable income per capita is expected to drive the United Kingdom’s outbound tourism sector. Baby Boomers, with more free time and money for travel, are the most important segment of the UK outbound travel sector. The baby boomer generation has topped the market share of the UK outbound travel sector mainly attributed to the recent changes in pension annuities.

THE UK TO USA MARKET

The UK remained the third largest nation travelling to the USA (outside Canada and Mexico) in 2017 with 3.27M visitors. However, USA travel decreased by 3% in 2017 for a number of reasons including the fall in value of the Pound against the Dollar and strong growth in Canada. Transatlantic travel is growing with the introduction of low-cost airlines disrupting the market. Flights to Boston have seen prices under £200 per sector with Norwegian daily and Primera Air 4 x per week.

Airlines using new aircraft such as Dreamliners, making long haul journeys more attractive and comfortable as well as affordable, thus making U.S. city breaks now more accessible than ever for all demographics.

Spain, France, Italy, Germany and the USA, in that order are the most visited destinations by UK residents and the United States was the most visited non-European destination with 3.3M UK visitors according to the NTTO.

Top USA destinations for the UK traveler continue to be New York, Las Vegas, California, Orlando, National Parks, Deep South and New England. 267,000 UK travelers visited New England, spending $533.3 million.

COMMUNICATION, BOOKING & GENERAL TECHNOLOGY FACTS

- 89% of adults in the UK had recently used the internet (in the last 3 months), up from 88% in 2016; while 9% had never used the internet, down from 10% in 2016
- Virtually all adults aged 16 to 34 years were recent internet users (99%), in contrast with 41% of adults aged 75 years and over.
- 90% of men and 88% of women were recent internet users, up from 89% and 86% in 2016.
• Recent internet use among women aged 75 and over had almost tripled from 2011.
• 22% of disabled adults had never used the internet in 2017, down 25% in 2016.
• Northern Ireland is catching up with the other UK regions in recent internet use, reaching 84% in 2017, however, it remained the region with the lowest recent use.
• 2017 was the ‘year of video marketing’ with 2018 set to be even bigger as organizations incorporate video marketing into all aspects of their customer experience.
• The projected use of video marketing is expected to increase to 80% of the total internet traffic by 2020.
• Consumers like to hear other consumers opinions, they believe these are unbiased, current and are trusted more than adverts. Latest statistics show that 66% of consumers trust other consumer opinions that are posted online.

**TRADE SHOWS**

• World Travel Market – November 2017
• Visit USA Briefing – Excel, London – November 2017
• Visit USA Unite Trade Show – March 2018
• DNE Summit – April 2018 – 8 UK tour operators and 1 UK journalist attended
• IPW – May 2018

**CONSUMER SHOWS**

• Destinations Manchester – January 2018
  • Visitor numbers: 30,120 +6.68%
• Destinations: The Holiday Show – London Olympia – 1st – 4th February 2018
  • Visitor numbers: 50,093
• Visit USA General Meeting – March 2018

**JOINT MARKETING ACTIVITIES**

• Vacations to America — $15,000 — Mar. – Nov.

**FAMILIARIZATION TRIPS – TRADE**

• DNE Summit Post Culinary Fam, April 2018
• Dave Lorch, Original Travel, May 2018

**FAMILIARIZATION TRIPS – MEDIA**

Four Individual Media Visits:

• Lindsay Sutton, Trinity Mirror Group – October 2017
• Michael McKenzie, The Scottish Sun – March 2018
• Lynn Houghton, Freelance – May 2018
• Emma Winterschladen, Liz Earle Wellbeing – June 2018
8 PRESS RELEASES & NEWSLETTERS

- Eight press releases issued
- Newsletters
  - Spring 2018 newsletter  
    (distributed in March 2018)
  - Summer 2018 newsletter 
    (distributed in June 2018)
GERMANY, AUSTRIA & SWITZERLAND
CONSUMER TRENDS & BEHAVIORS

The German-speaking market is quite wealthy, and consumer-spending habits on vacation experiences have been surveyed to increase in 2019 and beyond. Long-haul travelers enjoy planning their individual vacations well ahead and thoroughly in contrast to short-haul tourists heading off to mass tourism destinations. An appreciation of quality before price holds true for demanding travelers from Germany, Austria and Switzerland, where the GDP per capita exceeds $53,000 for the roughly 100 million residents, and unemployment and inflation rates continue to steadily decrease. Both Austria and Switzerland are small but growing and prosperous markets with nature and luxury loving travelers.

The USA remains Germany’s number one long-haul destination, and Germany continues to be the sixth largest market for inbound tourism to the U.S. Especially smaller tour operator specialists are reporting an increase in U.S. bookings and the current exchange rate makes travel to the USA more affordable than last year.

THE ECONOMY

The Organization for Economic Cooperation and Development (OECD) stated that Germany’s current and projected economic outlook is projected to ease somewhat but still remain robust and broad-based. The recovery in the euro area sustains exports and business investment. Nevertheless, business investment is still subdued by historic standards. Housing investment will remain strong, driven by higher house prices, although unmet housing needs of refugees will diminish. The tight labor market will boost private consumption and is expected to result in some pick-up of wage and price inflation. The current account surplus will remain large. There are downside risks related to the impact of the exit of the United Kingdom from the European Union, as it may disrupt the sourcing of inputs by key German industries, including automotive production and chemicals. On the other hand, some businesses have announced they will transfer activity to Germany. Geopolitical risks could reduce world trade and German exports. Steps to implement reforms to complete the Single Market in the European Union and establish a more comprehensive banking union in the euro area could strengthen confidence in the euro.

THE GERMANY TO USA MARKET

In 2017, visitation increased 1.7% gaining 34,000 visits ranking Germany as the fifth largest overseas market, accounting for 5.35% of total overseas visits to the United States. However, the German market share contracted from 5.37% of total overseas visits in 2016. Germany dropped from fourth to fifth due to South Korea’s increase.

Visitation from Germany to the U.S. is forecast to increase 10%, at an average annual rate of 1.6% between 2017 and 2023, to reach nearly 2.3 million by 2023.

Policies introduced by the new U.S. Administration generated worries in the travel industry that foreign tourists could be put off by restrictions such as the travel ban for visitors holding a certain passport. After a year in office, Germany’s top tour operators do not observe
any negative developments as the demand for travel to the United States remains high, in part thanks to the stronger Euro, the German press agency DPA found in a survey.

Germany’s second largest carrier Air Berlin filed for bankruptcy in August of 2017, leaving a gap in the market for long-haul flights to the United States from the German capital Berlin in particular. Lufthansa reports that they are experiencing difficulties in trying to replace the gaps left by their rival, the international news agency Reuters reports.

Regarding the New England market specifically, there were 169,000 overseas visitors from Germany with direct spending of $274.4 million USD. German visitors spent an average of 9 nights traveling within the region and traveled to 2.7 states, on average, during their 20-night stay in the United States.

**TRADE SHOWS**

- **ITB** — March 07 – 11, 2018
  - Over 10,000 exhibitors from more than 180 countries – more than two-thirds of whom came from abroad – were represented in 26 halls which were booked to capacity.
  - 110,000 trade visitors (2017: 109,000) travelled to Berlin.
  - Participants at the DNE booth came from Connecticut, Rhode Island, Massachusetts, Maine and New Hampshire.

- 42 pre-scheduled trade and media appointments plus “walk-ins” during ITB Trade Days.
- 187 journalists attended Visit USA Germany Media Breakfast.
- During the trade and consumer days, 700 Reiseplaner, 300 NE maps, and 300 pieces of state brochures and state maps were distributed.
- **DNE Summit** — Falmouth Cape Cod, Massachusetts — April 21 – 24, 2018
  - Seven German tour operators attended.
- **IPW Denver** — June 20-23, 2018
  - 20 appointments with German-speaking tour operators and a total of 44 appointments.

**CONSUMER SHOWS**

Participated with brochure distribution in the joint Visit USA/Brand USA booth at various consumer shows in 2018.

- **CMT Stuttgart**
- f.re.e München
- Reisen Hamburg
- Diamir “Globetrotter Days” Dresden
- Amerika Unlimited Reisemesse Bremen
- Distinct Travel Consumer Show Cologne
- Cruising Reise Event Langenberg
TRAININGS

• Sales calls and training and media calls in Berlin in November 2017
  o Visited 5 tour operators / travel agencies (trained 15 agents)
  o Visited 6 Journalists / Magazines

VUSA ACTIVITIES

• VUSA Switzerland – Travel Agent Seminar in Zurich
• 370 travel agents from throughout Switzerland
• Attended 3 VUSA Germany Meetings

FAMILIARIZATION TRIPS – TRADE

• Post Summit fams with four tour operators

FAMILIARIZATION TRIPS – MEDIA

• Christa Winteler for SonntagsZeitung, Tagesanzeiger and Der Bund
• Sabine Loeprick for Radio Berlin-Brandenburg (as well as other radio stations) and Forum Magazine
• Wolfgang Greiner, RoadTrip Magazine
• Andrea Bonder, America Journal, Reise & Preise, Reise-Magazin.de

JOINT MARKETING ACTIVITIES

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<th>TOUR OPERATOR</th>
<th>BRAND USA BUDGET TOTAL</th>
<th>DATES OF ACTIVITY</th>
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<tr>
<td>America Unlimited</td>
<td>$3,500</td>
<td>April 2018 (2 weeks)</td>
</tr>
<tr>
<td>Flamingo/USA-Reisen.de</td>
<td>$2,844</td>
<td>Nov. 3, 2017</td>
</tr>
<tr>
<td>Tour Consult</td>
<td>$5,000</td>
<td>Started Feb. 2018 – ongoing</td>
</tr>
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PRESS RELEASES & NEWSLETTERS

- Issued 12 press releases since July 2017, covering topics from lighthouses to winter getaways.
- Seasonal newsletter was distributed to a mailing list of 1,432 consumers

FULFILLMENT

GIA manages a dedicated New England phone line (+49 221 12 11); receives requests from consumers as well as the trade; distributes NE fulfillment packages.

Travel Agency Online Fulfilment program is managed by INFOX, www.infox.de, Germany’s leading mailing house which services the German travel trade. They deliver ordered materials, including the German DNE Guide, to approx. 12,000 retail travel agents and coordinate shipping for all consumer and travel trade shows for DNE.

CONSUMER REQUESTS

- 90 direct consumer enquiries
- 223 consumer enquiries via the website

TRADE REQUESTS

- 20 travel agency enquiries for a total of 1,137 brochures
- 213 requests from travel agencies for a total of 756 brochures
- Together with the consumer shows and roadshow, trainings etc. more than 3,850 German guides were distributed
JAPAN
CONSUMER TRENDS & BEHAVIORS

Japan continues to be one of the top markets for international arrivals to the USA. Just behind the U.K., the country had 17.89 million visitors traveling to the U.S. in 2017 (NTTO). The Millennial Generation has increased travel as the baby boomer generation as they enter their 70s and travel has been reduced. Millennials have always had smart devices and expect nothing different when planning travel.

JTB Tourism Research & Consulting recently conducted several surveys to see how travel styles have changed. It was found that 40.5% of Japanese travelers are searching for information on the web, while travelers using physical guides have declined over the past three years. Visitors are booking on their smart phones (33.2%) and purchasing travel products online (28.9%) versus travel agencies and over the telephone.

The demographic of active senior travelers is on the rise. One out of every four people traveling to the US are over the age of 65, about 33 million. This demographic has the money and time to travel and they enjoy long-haul destinations. Safety when traveling is their number one concern. World and US politics do not affect travelers unless safety is threatened.

THE ECONOMY

Japan boasts the third-largest economy in the world. The exchange rate continues to be favorable with the Japanese Yen slowly getting stronger compared to a year ago – about 17% to date. In 2017, inflation was about .47% compared to the previous year. Japan saw slow growth, but the GDP has been stable.

Much of the Japanese workforce is employed in the services industry. The country mainly exports electronics, transportation equipment and vehicles.

THE JAPAN TO USA MARKET

Japan holds 9.2% of the inbound overseas visitor market according to the U.S. Travel Association. 80,000 Japanese travelers visited New England, with $189.6 million in direct spending.

FAMILIARIZATION TRIPS – MEDIA

• Globetrotter Travel Guide, Aug 2017
• Quilt Jikan (Quilt Time), June 2017

PRESS RELEASES & NEWSLETTERS

• Produced and distributed thirteen newsletters and press releases
TRADE & CONSUMER SHOWS

- Japanese Sales Calls – Los Angeles, CA, April 3-4, 2017
  - Table-top reception.
  - 15 Japanese tour/receptive operator companies that are based in the LA area.

- New York City Event, NYC, Nov 2, 2017
  - Table-top reception for Japanese, Chinese and European tour/receptive operators that are based in the New York / New Jersey area.

- Japanese Sales Mission – Tokyo, Japan, Feb 12-16, 2018
  - Annual sales mission included groups sales calls, a tour operator seminar and a one on one appointment style workshop.
  - Approximately 80 tour operators were at the seminar.

- DNE Summit — Falmouth Cape Cod, Massachusetts, April 21 – 24, 2018
  - Six Japanese receptive operators attended.
AUSTRALIA & NEW ZEALAND
CONSUMER TRENDS & BEHAVIORS

Overall, there is confidence within the Australian economy with a stable GDP of 2.8% and one of the lowest unemployment rates of all time of 5.4%. Low wage growth has been a concern, however. The exchange rate has been less erratic over the past two years, which has given the consumer more confidence.

THE AUSTRALIA TO USA MARKET

Currently, there are more than 1.64 million visitors from Australia and New Zealand who travel to the USA. This has doubled over the course of the last 10 years. USA ranks third in overseas destinations for Australian travelers and is currently placed number one for the most popular destination for planning an overseas trip.

In terms of spend, the Australian traveler ranks 8th in all international key markets of Brand USA. This is because the average length of stay of the Aussie and Kiwi traveler is 22.3 nights in the USA, they book their trip on average at least 113 days in advance of travel and visit at least 2.1 states in a region when traveling to a USA destination. 73% of Australian visitation is repeat visitation.

Australian and New Zealand consumers continue to be more traditional in their approach to booking the USA with travel agencies (42%) and online travel agencies (38%) being the key sources for both planning and booking. Of these travel agent groups Flight Center owns 35% of the market share while Helloworld 30% of USA outbound travel. The largest OTAs in Australia are Webjet, booking.com and Expedia.

Airline capacity into the USA has continued to grow with eight airlines flying into the USA.

Expectations from the market are continued growth to the USA between now and 2021 between 3 and 5% in each independent year. (Source: Brand USA) Total estimated visitation by 2021 will be an additional 402,000 travelers per year.

VISITATION TRENDS TO NEW ENGLAND

Currently, there are more than 72,000 visitors from Australia to New England, spending $202.2 million. 78% of these visitors are leisure travelers. Over the past year, visitors coming to visit historic places and small towns has increased from 46% to 66% as destination awareness grows.
KEY MARKET INITIATIVES

Discover New England Sales Mission, October 2017
- More than 250 connections with key market points of contact
- Three culinary-themed media events

Visit USA Brand USA and IM, February 2018
- DNE was platinum sponsor at Visit USA show series in Brisbane, Melbourne and Sydney.
- 37 B2B sessions with Australia’s top tour operators
- 22 independent meetings at Sydney’s International Media Marketplace

DNE Summit, April 2018
- 5 Australian/New Zealand tour operators attended

Press Releases
- Issued five press releases from July 2017 through June 2018

Media Visits and Earned Media Coverage
- Pitched and received 45 articles or stories in top market publications with an earned media value of $148,650 and reach of 24.2 million impressions

FAMILIARIZATION TRIPS — MEDIA
- Janeece Keller, Bound Round/My Discoveries, Sept 2017
- Liz Bond, Escape/Escape.com/This Magnificent Life, Oct 2017
- Jenny Piper, Bruce Piper, Travel Bulletin/Travel Daily, Sept 2017

FAMILIARIZATION TRIPS — TRADE
- (Sell Your Way)
- Jodie Garner, Flight Centre, Sept 2017
- Brianna Johnson, Escape Travel, Sept 2017
- Aaron Eilers, Cruise Express, Sept 2017

JOINT MARKETING ACTIVITIES

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<tr>
<th>TOUR OPERATOR</th>
<th>BUDGET</th>
<th>DATES OF ACTIVITY</th>
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<tbody>
<tr>
<td>Australia Pacific Tours</td>
<td>$14,750 (Includes Brand USA)</td>
<td>January 2018</td>
</tr>
<tr>
<td>Venture Far</td>
<td>$9,000</td>
<td>December 2017 – April 2018</td>
</tr>
<tr>
<td>House of Travel</td>
<td>$10,000</td>
<td>May 15 – June 30, 2018</td>
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IRELAND
CONSUMER TRENDS & BEHAVIORS

The U.S. is one of the top three destinations, behind Spain and Portugal, for Irish travelers. In 2017, Irish residents took almost 8.2 million foreign trips, which was an increase of 6.9% on the 2016 statistics. Considered to have one of the highest internet user populations across Europe, the Irish are considered well-traveled and take several overseas flights each year.

The outlook from the Irish travel industry is optimistic with a strong start for 2018 due to an increase of bookings (20% up over the same period last year), according to the latest Irish Travel Agents Association (ITAA) quarterly survey. When asked about the biggest travel trends in 2018 so far, agents say all-inclusive cruises have seen a huge surge in popularity.

Irish travelers are known to be avid researchers and visitors to the U.S. are mainly here for a holiday or for leisure (56%), with city breaks, soft adventure vacations, family beach/seaside vacations, and shopping being the main activities during the visit. The average age is 25-45 years old and the consumer profile continues to show steady growth in the over 50s, ‘empty nesters’ with disposable income, as well as families here for a summer vacation.

THE ECONOMY

Ireland was the fastest growing economy in the European Union in 2017 and is expected to remain strong in 2018 with GDP growth estimated at 4.4%. The unemployment rate of 6% is the lowest in 10 years and has contributed to a boost of consumer confidence. According to the Central Statistics Office, the average inflation rate for 2017 was 0.26% and the average industrial wage was up 3.1% in 2017 across eight out of the thirteen sectors.

The country benefits greatly from foreign direct investments from major high-tech manufacturers such as Intel, Google, Facebook, IBM, EMC, Apple, United Drug and Pfizer. Ireland is one of the world’s biggest exporters of pharmaceuticals and software.

THE IRELAND TO USA MARKET

Ireland ranked in the top 20 international arrivals into North America and has the highest per capita travel to the U.S. in Europe, third in the world behind Canada and Mexico with an average of 8.82%. The average length of stay is 12.4 nights and Q1 of 2018 saw a visitation increase of 24%. This is supported by the 22% increase in transatlantic seat capacity from Ireland. Ease of travel is only increased when flying through airports in Dublin and Shannon because the presence of U.S. Customs and Immigration Pre-Clearance, which Ireland is the only European country with this amenity.

New England enjoys a very high profile in Ireland because of the strong ethnic links forged decades ago, with our historical, cultural, coastal and maritime aspects, which are all very attractive to the Irish traveler. Especially, with daily service from Dublin and Shannon flying directly to Boston Logan.
TRADE & CONSUMER SHOWS

- WTM, London – November 2017
- Holiday World Show, Dublin – January 2018
  - Well attended show, with a total of 43,000 consumers throughout the three-day event. Approximately 1,000 travel agents attended on Trade Day.
- Aer Lingus Roadshow, Belfast, Dublin, Limerick, and Cork – February 2018
  - Participants had the opportunity to meet with more than 369 travel agents
  - Format was a tradeshow style where agents circulated and visited vendor tables while videos of destinations were displayed
- DNE Summit, Cape Cod, MA – April 2018
  - Two Irish tour operators attended

FAMILIARIZATION TRIPS – TRADE

- DNE Summit Post Culinary FAM Trip, April 2018

PRESS RELEASES & NEWSLETTERS

- Issued seven press releases since November 1, 2017, covering topics from classic New England to breweries, food and drink trails.
- Distributed two newsletters

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<tr>
<th>TOUR OPERATOR</th>
<th>TOTAL COST</th>
<th>PROPOSAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platinum Travel</td>
<td>$5,000</td>
<td>Four NE focused e-zines sent to a database of 3,000 dedicated NE landing pages on flydriveusa.ie and platinumtravel.ie, with banner advertisements on both for the duration of the campaign. NE microsite advertisement in the Irish Independent. Eight-week Google AdWords campaign.</td>
</tr>
</tbody>
</table>
NORDIC REGION (DENMARK, SWEDEN, NORWAY & FINLAND)
CONSUMER TRENDS & BEHAVIORS

The bad weather during the summer in 2017, along with an extremely cold winter, has the Scandinavian travel market predicting a banner year for 2018. For the seventh consecutive year, the Danish Travel Awards named the U.S. as the ‘Best Longhaul Destination,’ a designation is solely decided by consumers. The Nordic Region consists of Denmark, Sweden, Norway and Finland.

During the past three years, Scandinavians have changed their international travel patterns by decreasing the length of stay but increasing the frequency of travel. Travelers are primarily booking their summer holidays in January and February (USA Tours) and USA tour bookings are 25% ahead compared to the same period last year. Although, travel companies are seeing the landscape change from selling trips to now selling information about the destinations.

According to media agency GroupM, at least half of all advertising budgets in Denmark are being spent on Google and Facebook. While traveling, the average Scandinavian spends 73 minutes per day on social media, Facebook accounts for 61% and Instagram for 34%. The new trend is called #Travelbrag and shows things like safety, family and spending time with loved ones, and has less of a focus on sharing the perfect vacation photo.

THE ECONOMY

EU’s new General Data Protection Regulation (GDPR) law went into effect on May 25, 2018. The new regulations require companies to address the standards of how they treat and store data regarding their users’ privacy rights.

With a better than expected economic growth, Sweden’s economy grew 2.8% (2.4% predicted) and Norway’s grew 1.9% (1.5% predicted). However, the Danish economy’s growth was the frontrunner with an unexpected growth of 2.1% versus the forecasted rate of 1.5%. (Reuters.com). The average unemployment rate is 5.2%, with the EU averaging 7.6%. The inflation rate is 2.1% and GDP growth was 2.5% in 2017. It is important to note that all countries enjoy excellent international political and trade relations and are members of the EU (except Norway).

The average Nordic household has two adults and two children with an income of $94,779 and have an internet penetration of 96% (one of the highest in the world). The countries have free health care and education (every student over the age of 18 years is entitled to public support for further education and receives $1,000 per month). Copenhagen and Southern Sweden are the most densely populated areas, most live in urban locations, mainly around the capitals and secondary cities.
THE NORDIC REGION TO USA MARKET

The Nordic Region is an attractive opportunity for the U.S. and New England, in particular. In 2016, 1.4 million visitors from the region visited the United States, this number has increased 3.1% in 2017. Many Scandinavians belong to the money-rich, time-poor segment and prefer to travel multiple times a year. Peak months continue to be June/July and extra disposable income is spent on travel.

Sweden has introduced a new eco-friendly aviation tax; depending on the destination, all flights departing from Swedish airports will now have an added charge of between $6-46 USD, with the $46 USD primarily for overseas flights. Several airlines are adding connections to the U.S. market, including Primera Air, SAS, and Icelandair. SAS saw a passenger growth of 4.5% in March 2018, where U.S. route traffic grew by more than 6%. 66,000 travelers from Scandinavia visited New England.

TRADE & CONSUMER SHOWS

- Brand USA and Discover America Norway Roadshow, Oslo, Trondheim, Bergen, and Stavanger – September 2017
- Swanson’s US Travel Show, Osby, Sweden – March 2018
- FDM US Travel Show, Copenhagen, Denmark – March 2018
- Discover America USA Travel Show 2018, Copenhagen, Denmark – March 2018
- DNE Summit, Cape Cod, MA – April 2018
FAMILIARIZATION TRIPS – TRADE

- BIG Travel Sweden, December 2017
- HRG Nordic, January 2018
- SAS Agent FAM to Boston, MA, April 2018
- VIP FAM trip to Rhode Island with KLM, May 2018
- Individual research trips
  - FDM Travel Denmark, April 2018
  - BIG Travel Sweden, May-June 2018
  - Risskov Rejser study trip planned for September-October 2018

FAMILIARIZATION TRIPS – MEDIA

- SAS, April 2018
- Jyllands-Posten
- Jysk Fynske Medier
- Jens Henrik Nybo, October 2017
- Miriam Poulsen, October-November 2017
- Jonas Henningsson, October 2017
- Kim Iversen, December 2017

PRESS RELEASES & NEWSLETTERS

- Produced and distributed thirteen newsletters and press releases
ANNUAL TOURISM SUMMIT & INTERNATIONAL MARKETPLACE
ANNUAL TOURISM SUMMIT & INTERNATIONAL MARKETPLACE

April 22 – 24, 2018
Sea Crest Beach Resort, Cape Cod, MA

Participation:

• Delegates – 85 buyers from 81 companies and 14 countries, and 214 New England suppliers, including state tourism organizations, officials, and international representatives

• An overview of DNE’s efforts was shown at the Monday luncheon

• Facilitated more than 5,000 pre scheduled eight-minute meetings between international buyers and New England suppliers

• Staff and volunteers coordinated and managed the marketplace

• Coordinated three post-Summit FAMs (with themes of Outdoor Recreation, Culinary Delight, and History and Culture)

• Highlights included:
  o Keynote remarks from Roger Dow, CEO of the United Stated Travel Association
  o Market Update: a panel of ten international specialists spoke about the latest trends in their market

Buyers came from:

• Australia/New Zealand (5)
• Belgium (1)
• Canada (1)
• China (4)
• France (5)
• Germany (7)
• Ireland (2)
• Italy (8)
• Japan (6)
• Netherlands (4)
• Scandinavia (2)
• United Kingdom (8)
• USA (29)
• Online travel agencies/operators (3)
• **Post-Summit FAM New England – A Playground for Outdoor Recreation**
  (12 participants from Germany, Netherlands and Italy)

• **Post-Summit FAM New England – A Place Rich in American History & Culture**
  (9 participants from New Zealand, Australia, Italy and Germany)

• **Post-Summit FAM New England – A Culinary Delight**
  (13 participants from New Zealand, Germany, Ireland, UK, Netherlands and Scandinavia)
SOCIAL MEDIA
FACEBOOK

New Organic Likes: 1,573
Total Likes: 10,896
Daily Total Reach: 442,054
*Daily: The number of people who have seen any content associated with your Page. (Unique Users)*
Total Daily Page Engaged Users: 13,819
*Daily: The number of people who engaged with your Page. Engagement includes any click or story created. (Unique Users)*
Daily Total Impressions: 606,080
*Daily: The number of impressions seen of any content associated with your Page. (Total Count)*

**Fans are coming from 45 different countries:**

- Algeria
- Argentina
- Australia
- Austria
- Bangladesh*
- Belgium
- Brazil
- Bulgaria
- Canada
- Czech Republic
- Denmark
- Egypt
- France
- Germany
- Greece
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Malaysia
- Mexico
- Myanmar*
- Netherlands
- New Zealand
- Nigeria*
- Norway
- Pakistan
- Philippines
- Portugal
- Singapore
- South Africa
- Spain
- Sri Lanka*
- Sweden
- Switzerland
- Taiwan
- Thailand
- Turkey
- United Arab Emirates
- United Kingdom
- United States of America
- Vietnam*
FACEBOOK POSTS WITH MOST IMPRESSIONS

People Reached: 4,704
Likes: 68
Comments: 16
Shares: 25

People Reached: 23,743
Likes: 521
Comments: 70
Shares: 136
FACEBOOK POSTS WITH MOST IMPRESSIONS

People Reached: 7,011
Likes: 352
Comments: 25
Shares: 59
TWITTER
Total Followers: 3,446
New Followers: 259
Engagement: 879

INSTAGRAM
Media Posted: 542
Followers: 1,687
New Followers: 595

PINTEREST
Average Daily Impressions: 598
Average Daily Viewers: 384
Total Impressions: 73,490

YOUTUBE
Watch Time: 77,000 minutes
Views: 39,300
Videos in Playlist: 1,908
Total Subscribers: 107
Traffic Sources
- External: 28.6%
- YouTube Search: 34.6%
- Suggested Videos: 22.2%
- Other: 14.6%
Top Geographies by Watch Time
- United States
- United Kingdom
- Germany
- Italy
- Brazil
WEBSITE
MAIN SITE

- The DNE website had 788,511 unique visitors in 2018
- 40.48% of users visited via mobile devices (13.4% via tablet)
- There were 142,286 unique visits to the visitor guide
- Top landing pages:
  - Fall Foliage Maps
  - One Week Fall Foliage Tour
  - New England Quick Facts
  - New England State Maps
  - New England States
  - New England Fall
  - Beaches
  - Northern Coastline Tour
  - New England Weather
  - Whale Watches

OTHER KEY STATISTICS

- Avg. bounce rate: 46.69%
- New visitors: 87%
- Page views: 1,779,215
- Site speed:
  - Average page load time dropped 14% (2.82 seconds vs 3.21 seconds)
  - Average page download time improved by 33% (.12 seconds vs .16 seconds)

REFERRALS FROM SOCIAL NETWORKS

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GERMAN SITE

- Avg bounce rate: 43.09%
- Unique visitors: 44,387
- Page views: 117,871
- Mobile: 36.94%, 16,443 visits
- Top landing pages:
  - Boston – Things to Do
  - New England Quick Facts
  - New England Beaches
  - Fall Foliage Drives
  - New England States
  - Whale Watching
  - Massachusetts
  - Vermont
  - Six-state Foliage Tours
  - One-week Fall Foliage Tour
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