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DEAR FRIENDS OF NEW ENGLAND,

I am pleased to present Discover New England’s annual report for July 2018 to June 2019. 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 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 in Portsmouth, New Hampshire, USA, where three staff members develop, direct and oversee all 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, Australia and New Zealand.

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

**Vice Chair:** Mark Brodeur, Rhode Island  
(July 2018 – June 2019)

**Treasurer:** Victoria Cimino, New Hampshire  
(July 2018 – April 2019)  
Amy Bassett, New Hampshire  
(April 2019 – June 2019)

**Secretary:** Francois-Laurent Nivaud, Massachusetts  
(July 2018 – March 2019)  
Keiko Orrall, Massachusetts  
(April 2019 – June 2019)

**Member:** Steve Lyons, Maine  
(July 2018 – June 2019)

### 2018/2019 MAJOR ACCOMPLISHMENTS

- New England was visited by 2.21 million overseas residents in 2017 and outperformed the U.S. average growth by 2%.

- Overseas visitors spent $7.1 billion traveling in New England states. That was an increase of 16.5% over the previous year. Spend increase was due to a mix of an increase in visits and increased air capacity (and access) to New England.

- In partnership with the Greater Boston CVB, hosted a UK Sales Mission in conjunction with the first ever Major League Baseball game played in the United Kingdom.

- Received two Step Grants for Australia and New Zealand Initiatives.
UK
ECONOMIC AND GENERAL OVERVIEW

- In 2018, the population for the United Kingdom was 66.2 million, increasing from 55.2 million in 1968 to 66 million persons in 2017, growing at an average annual rate of 0.37 percent. The population in the UK is getting older with 18.5 percent aged 65 and over and 2.4 percent aged 85 and over.

- The UK economy continues to be the 5th largest economy in the world, after USA, China, Japan and Germany (source www.Knoema.com). What is interesting to see is that China has now taken over the USA as the largest economy and will most probably rank #1 in 2020.

- The UK remains the second largest economy in Europe after Germany. Britain’s quarterly economic growth was confirmed at 0.2 percent in the three months to December 2018, below the previous three-month period’s revised figure of 0.7 percent. Household consumption and government spending supported the expansion, while gross capital formation and net trade contributed negatively to GDP growth.

- The UK unemployment rate stood at 3.9 percent in the three months to February 2019, its lowest level since the November 1974—January 1975 period and in line with market expectations. Employment continued to increase at a solid pace despite Brexit uncertainty and total pay growth was at the joint highest rate since mid-2008.

- Brexit date is now scheduled for January 31, 2020.

- UK annual holiday allowance minimum remains at 20 days plus eight public holidays.

MARKET TRENDS AND TRAVEL HABITS

UK residents made 72.8 million trips overseas in 2017/18 despite uncertainty created by world events, political upheaval and economic pressures. That was a 3 percent increase from the previous year, or two million more visits.

ABTA research shows that 86 percent of the population took a holiday in 2018, either at home or abroad, and wider industry statistics show that the overall package holiday market was up 5 percent in summer 2018.

In 2018, holidaymakers have focused on preserving and investing in their longer overseas break, in particular, with foreign holidays of seven nights or more increasing in the year to August 2018 and 60 percent of the population saying they took a foreign holiday over the same period, the highest figure since 2011.

In the past two years, the pound has fallen in value against a number of significant currencies including the euro and the dollar. ABTA’s research suggests that people have offset the impact of a weaker pound
through tighter budgeting. Value for money increased as a priority when choosing a package holiday (up to 60 percent) and holidaymakers also cut back on their spending money while away, both in the UK and abroad. The average spend was down £24 (£586 to £562) for longer holidays abroad and £40 (£311 to £271) for longer holidays in the UK, showing that people trimmed some of their holiday costs.

Despite the uncertainty around Brexit, forward bookings are up 12 percent on this time last year. January started very strong with all major tour operators forecasting large growth YOY on quotes and bookings.

The increase in early bookings is likely to reflect people wanting to get value for money and the destination of their choice. With a weak pound, holidaymakers are expected to be more cost-conscious in 2019 – more than half (51 percent) plan to spend the same on their holiday, with fewer people spending more (down 6 percent from last year to 25 percent).

Although there is continued pressure on consumer spending power, ABTA research shows holidays remain a spending priority, although a continued weak pound means the desire to get a value-for-money break has strengthened and is reflected in traveler’s choices.

KEY TRAVEL TRENDS

RESPONSIBLE TOURISM GOES MAINSTREAM

Holidaymakers are increasingly aware of the impact they have on a destination when they go away, with 45 percent of people saying sustainability is an important element when booking a holiday, up 6 percent from last year. It is also increasingly a factor when choosing who they travel with; over a third (36 percent) would choose one travel company over another if they have a better environmental record—up 6 percent since last year.

Responsible tourism is becoming a significant consideration for consumers planning a holiday, and the same can be said for more travel companies, as well. For quite some time the industry has been working across a range of sustainability issues, from waste management (including plastics) to carbon, as well as taking action to support the local economy and local workers. The impact on the communities they visit is becoming a mainstream consideration for travel companies and an integral part of business decisions and planning. G Adventures recently introduced a ‘Ripple Score’ tool which shows what percentage of a tour’s local spend remains in the local economy, so people can see how they positively affect locally owned businesses. TUI has pledged to deliver 10 million ‘greener and fairer’ holidays by 2020, enabling more local people to share in the benefits of tourism. Intrepid customers can visit one of the poorest and least developed regions of Myanmar and contribute to local businesses in a responsibly managed way.
Travel companies are taking different approaches to how holidays can be more sustainable in the long term and create a positive impact on local communities. Increasing awareness among consumers means we can expect to see this trend continue in 2019 and far beyond.

RESURGENCE OF THE TRUSTED TRAVEL EXPERT
ABTA research shows that one of the main reasons holidaymakers book with a travel professional is because they feel more confident (45 percent). In an age of limitless choice and information, the service travel professionals provide is highly valued—offering a few well-selected holidays which meet the customer’s specific requirements, while also giving advice and support throughout the booking process. Google data reinforces this, as 69 percent of travelers prefer to return to travel companies that seek to personalize the user experience. The demand for personal, tailored and expert travel advice is demonstrated with Hays Travel and Barrhead Travel among those ABTA members opening more stores or announcing growth plans. This is coupled with the increase in travel professional homeworkers—up by more than 10 percent each year over the past six years across ABTA members alone. Hays Travel has reported that the profitability of homeworkers has increased by 20 percent year-over-year.

We’re also seeing cruise companies strengthening their commitment to travel agents in recognition of their critical role in selling cruises—agents work closely with a customer to find the cruise that best fits their requirements. Competitive reward schemes from Cunard, P&O and Royal Caribbean reflect the value they place on agents and APT river cruises reported record sales this year, citing agents as critical to their growth. The fact that 59 percent of millennials would pay extra for a holiday tailor-made to their preferences, and with ABTA research showing that young people say they have a better holiday when they book with a travel professional, it looks like the trusted travel expert has a bright future.

WELLNESS TRAVEL IS ON THE RISE
According to the latest Global Wellness Institute report, wellness tourism is worth an estimated $639 billion globally, growing more than twice as fast as general tourism. More people than ever are seeking new ways to alleviate stress, reduce illness and boost wellbeing—with trips globally up 20 percent since 2015; and travel companies—from adventure to youth to cruise brands—increasingly cater to the demand for wellness holidays. While the classic ‘party destination’ holiday is still popular for young travelers, they are also broadening their horizons. Intrepid’s new 18 – 29 brand offers socially conscious opportunities, such as staying with a local or participating in community development projects.

THE TAILOR-MADE PACKAGE
Ease of booking, value for money and consumer protection have long been core benefits of the package holiday. Increasing numbers of holidaymakers look to a package for a good value break—in 2018, 60 percent
booked a package because it was the best value option for the price, up 3 percent over 2017.

The new Package Travel Regulations (which came into effect on July 1, 2018) mean that more holiday travel arrangements have now become packages. Whether it is a fortnight on a Spanish beach, an expedition to Everest base camp, or a multi-centre trip around Asia—it is not where you go or what you do which makes it a package, rather how it is booked. Travelers who want a bespoke trip can do so while still enjoying the protections and reassurances of a package, if they book services together in the same purchase. Travel companies are finding more ways to provide flexible and personalized holidays. Kuoni’s new brand, Meraki Travel, allows holidaymakers to book a tailor-made package online. Solo travel specialist Just You is offering more options to customize their trips through its “Make Your Own Way” service. And customers can book a TUI package earlier than ever before, after its summer 2020 program was launched in November 2018.

FAMILY TRAVEL IS CHANGING AND MODERN FAMILY DYNAMICS WILL INNOVATE TRAVEL

The United Kingdom’s Office for National Statistics states that there are around two million single-parent families today in the UK. The travel industry is quickly catching up. Virgin Holidays launched a new price program for single parents and Intrepid saw a 16 percent growth in family bookings, launching six new family tours in 2018. These tours do not charge more for parents traveling without a spouse.

ADVENTURE TRAVEL IS GETTING A NEW DEFINITION

According to a recent study by the Adventure Travel Trade Association (ATTA), the definition of adventure is changing. Risky adrenaline activities are favored 45 percent less than “experiencing a new culture” in the definition of adventure travel. And travel companies are taking note. Intrepid Travel is seeing a 20 percent increase in bookings this year for its Real Food Adventure tours which offer cooking classes, wine tastings and local market visits. Day tour company, Urban Adventures, launched a range of locally focused shopping (‘Made-In’) tours in 2018.

SOLO TRAVEL AT AN ALL TIME HIGH

Google searches for “solo travel” and “travel alone” were at the highest they’ve ever been in January of this year. Travel companies are now building catered products to not only accommodate but celebrate the solo traveler. After seeing a 40% increase in solo passengers on group trips over the past five years, Intrepid Travel launched their first solo only tour range. Meanwhile, Saga Cruise has built 109 solo cabins on its new ship launching in 2019. It’s a new era for solo travel.

THE UK TO USA MARKET

The UK remained the third largest nation travelling to the USA (outside Canada and Mexico) in 2018 with 4.2 million visitors.
New England attracts a very sophisticated and well-travelled passenger base as visitors come from all demographics. They are attracted to staying in New England due to educational links, history, culture and the arts, visiting family and friends, cruising, multi centre across states and multi country which could be incorporated into a self-drive, escorted tour or cruise.

There is also big appeal for sports travel and soft adventure. New England attracts an international repeat customer base. Historically the key demographic has always been the 50+ market but research shows that is changing. With the increase in airlift to Boston and the trend for adventure, sport and food, the younger demographic—millennials and young professionals could be key return visitors to the region, bringing with them their children and then their grandchildren for future visits.

TRAVEL TO NEW ENGLAND

Boston Logan is serviced directly from London Heathrow by:

- British Airways 3 x daily flights and 1 further flight operating 4 times a week
- Delta Air Lines 1 x daily flight
- Virgin Atlantic 2 x daily flight

Boston Logan is serviced directly from Manchester by:

- Virgin Atlantic twice weekly flights – seasonal Mar-Oct

Boston Logan is serviced directly from London Gatwick by:

- Norwegian Air daily
- Virgin Atlantic (daily as of 2020)

Boston Logan is serviced directly from Edinburgh by:

- Delta Air Lines – 2 x weekly flights – seasonal Mar-Oct

Indirect services from other airports:

- United Airlines Belfast, Birmingham, Edinburgh, Glasgow, London Heathrow and Manchester to Newark
- Aer Lingus with increased services from Dublin and Shannon
- Aer Lingus offers a feeder service: Aberdeen, Birmingham, Blackpool, Bournemouth, Bristol, Cardiff, Edinburgh, Glasgow, Jersey, London Gatwick, London Heathrow and Manchester
- Icelandair Regional departures from Glasgow, London Gatwick, London Heathrow, Manchester and from Birmingham to Reykjavik

New flight routes:

- Delta Air Lines – Edinburgh to Boston launched in May 2019
TECHNOLOGY

Service-based technology is making travelers lives easier—from the moment they leave their front door to their return to home soil. For a smoother journey through the airport, passengers travelling with airlines such as British Airways, Finnair and easyJet can now get their luggage collected from their home and checked in, avoiding the need to carry their cases or queue at baggage drop. The emergence of facial recognition technology is replacing the need for passports at some airports. Heathrow Airport, Singapore’s Changi Airport and Shanghai Hongqiao International Airport are already trialing this technology, and it is due to be introduced in Dubai airport with full installation by 2020.

Hotels such as the Four Seasons are taking the mess out of sunbathing with sunscreen booths which offer head-to-toe coverage in only ten seconds. Holidaymakers can also now choose a specific room and sunbed location in selected Thomas Cook hotels. When it comes to the end of the holiday, Jet2holidays has more than 300 hotels where customers can check in their bags for their flight, leaving them luggage free for the rest of their trip. Virgin’s ‘Departure Beach’ in Barbados lets guests check into their flight, get their boarding pass and spend their last few hours chilling out at the beach rather than waiting in the airport terminal. Anyone returning home to Glasgow airport can also avoid having to go to the market when they get home, as it is one of the first to test a post-holiday grocery pick-up service.

TRADE SHOWS

World Travel Market – November 2018
Visit USA Unite Trade Show – March 2019
DNE Summit – May 2019
IPW – June 2019

Other Special Events with Trade / Media:
DNE Sales Mission, London – May 2019
America’s Musical Journey Premiere – October 2018
Visit USA & Brand USA Thanksgiving Event – November 2018

Media events attended:
Visit USA Media Marketplace and Awards – July 2018
British Guild of Travel Writers Directory Launch Party – July 2018
Tourism Society & TravMedia – Media Masterclass – November 2018
Visit USA Association Meet the Media event – January 2019
Essentially America’s 25th Anniversary Party – January 2019
TravMedia MediaPlace networking event – February 2019
CONSUMER SHOWS
• Kuoni: Royal Highland Show – June 2019

JOINT MARKETING ACTIVITIES
• Vacations to America — $15,000 — March – November

TOUR OPERATOR TRAININGS
• 365 tour operators trained throughout the UK

FAMILIARIZATION TRIPS – TRADE
• May 2019: DNE Post Summit (MA, CT, RI)

FAMILIARIZATION TRIPS – MEDIA
• Qin Xie, Metro – October 2018 (MA, ME, NH)
• Graeme Croser, Mail on Sunday in Scotland – April 2019 (CT, MA, ME, NH, RI)

PRESS RELEASES
11 press releases issued:
• Millennial travel to New England
• News for 2019 to travel trade publications in the lead up to WTM
• Information on Autumnwatch New England
• Discover New England Stand NA 165 – Competition for Travel Agents at WTM

• New England 2019 News & Announcements
• Travel agent competition winner at WTM
• In 2019 Delta Airlines will launch an Edinburgh to Boston daily flight starting 23 May 2019
• One-of-a-kind dining experience at Ocean House, Rhode Island
• Follow in Jack Reacher’s footsteps through Maine, USA
• Follow in Jack Reacher’s footsteps and visit small towns in New England, USA
• A prize perfect for Father’s Day – win your name in a Jack Reacher book and the ultimate road trip through New England with Shipyard Beer

As a result of PR activity, the earned media value was $7,381,091 USD.

FULFILLMENT
Consumer Requests
• Fulfilled 186 DNE brochure requests
• Fulfilled 186 New England map requests
GERMANY & AUSTRIA
CONSUMER TRENDS & BEHAVIORS

Germany remains a strong market for U.S. travel, falling within the top five international markets and as the third strongest for New England. According to the National Travel and Tourism Office (NTTO), while there was an approximate 1 percent decrease in the number of German arrivals into the states in 2018, the total of arrivals remained strong with just under two million. In 2019, more than 80 percent of Germans reported that their financial situation was good or better than it was in 2018.

Several trends have surfaced in 2019 and will continue into the new year:

- Mid-sized tour operators are profiting more than the larger operators, with stronger turnover growth in 2018 than the market leaders due to varied types of vacation offerings, including experiential travel for small groups.
- Both large and small tour operators are trying to collect more consumer information to market directly, while still including travel agencies as a booking tool.
- The German U.S. specialist tour operators such as Argus Reisen, Faszination Fernweh, American Unlimited and Canusa have expanded their marketing efforts with heavier emphasis on online advertising like Google AdWords and other out-of-home, less traditional advertising avenues to keep up with the evolving consumer.
- The Renaissance of package tours to the Eastern Mediterranean, with strong dips in bookings in previous years.
- Large tour operators including TUI, DERTOUR, Neckermann and FTI reported just under 90 percent of their turnover is generated through travel agencies.

In June of 2018, Germany’s travel trade publication, fvw, reported the German tour operator market grew by 8% over the previous year to $39.1 billion. Tour operator websites and online travel agencies also increased revenues by up to 14 percent, as traditional travel agencies continue to lose share in the shifting market.

However, according to the annual “German travel sales” fvw report based on company data and figures from the German Travel Industry Association (DRV), travel agents increased combined sales by 4.6 percent throughout 2017. This increase helped balance out a previous decline that occurred in 2016.

NTTO also reported Germans’ spending on travel increased in 2018 to $8.3 billion, growing slightly from $8.2 billion in 2017. This trend can be supported through evidence of more expensive holidays, such as cruises, long-haul and luxury trips and immersive experiences.

Some operators were down 20 percent last year versus the previous year until June of 2019, with an increase in last-minute bookings, as well as fly/drives. Travelers have begun to use online travel agencies (OTAs) for travel experiences, while Germans still attend consumer shows for travel destination information and book long-haul travel through
brick and mortar travel agencies. Exceptional summer weather throughout Germany in 2018 has been a reason for Germans to explore in-country.

Personal security remains a vital issue for international travelers, as well as the political environment.

THE ECONOMY

The Organization for Economic Cooperation and Development (OECD) reported that growth of GDP slowed significantly in 2018 as world trade and important export markets decelerated. Projections for 2019 are positive but slow-moving, with a 0.7 percent growth in 2019 and in 2020, a 1.2 percent increase.

Germany’s economy continues to remain export driven. Temporary situations related to the automobile and chemical industries in late 2018, and the certification delays for new emission standards contributed to the dip in GDP have now resolved and yielded a better outlook for the first quarter of 2019.

Considerations like Brexit and various trade disputes are causing uncertainty and lack of confidence, resulting in stagnant business investment and export growth. However, a record-low unemployment rate, high labor force participation and a boost to wages are expected to support construction and private sectors which could prompt long-term growth.

Early in 2019, Germania, a vacation airline, announced unexpectedly that it was forced to file bankruptcy, impacting 260,000. Those who had booked travel via a tour operator were rebooked, while those who booked direct with the airline lost out.

Other uncertainties include: the budget deficit in Italy; “Yellow Vest” protests in France; the collapse of the government in Spain; trade conflicts between the U.S. and China; and the threat of nuclear proliferation following the U.S. and Russian withdrawal from the INF Treaty.

Overall, weaker global trade and ongoing disputes will hinder a more substantial growth pattern.

THE GERMANY TO USA MARKET

Germans viewed the U.S. as a relatively safe travel destination despite protests concerning violence with and against police enforcement and gun control. The political landscape of the U.S. also played a huge role in influencing the Germans decision to travel to the U.S. as a vacation destination.

According to the 2019 Brand USA Market Information for Germany, Switzerland and Austria, a total of 28-32 paid vacation days are awarded to salaried German employees each year, and some employees are even provided an additional vacation bonus or a thirteenth month salary. This length of vacation time paired with the 10-14 public holidays, provide ample time for Germans to explore the states.

Germans traveling to the U.S. are primarily visiting for a vacation/holiday (57.7 percent in 2018, down slightly from 57.9 percent in 2017) and to visit friends and relatives (19.3 percent in 2018, up from 18.3 percent in the previous year). While in the states in 2018, Germans stayed an average of 16.2 nights and 45 percent rented a vehicle for ground transportation needs. For 19 percent of visitors, it was their first international trip to the U.S.
Shopping, sightseeing, visiting our national parks and monuments, as well as historical locations, top the list of attractions and activities Germans like to partake in when visiting. The list of top interests complements New England’s rich offerings.

Regarding the New England marketing specifically, there were 148,000 overseas visitors from Germany. New England’s market share of overseas visitor arrivals decreased from 8.31 percent in 2016 to 7.1 percent in 2017. In total, German visitors spent $222.4 million while here in New England.

TRADE SHOWS

**ITB 2019, March 06–10, 2019**

- More than 10,000 exhibitors from more than 181 countries
- 113,500 trade visitors (an increase of 4,500 from 2018)
- Participants came from Connecticut, Rhode Island, Maine and Massachusetts
- DNE had 47 pre-scheduled trade (30) and media (17) appointments at the booth plus “walk-ins” during the show. Further media appointments were held at the Brand USA Lounge as well as during several media related events taking place in the course of ITB 2019.
- TravMedia’s International Media Marketplace (IMM) is one of the industry’s leading events for the media to meet travel and tourism brands. Markus participated on behalf of GIA and met with top travel journalists, editors and broadcasters to present and discuss the news, events and developments of the company and its clients, including DNE.

  - GIA was part of Post & Toast, an exclusive blogger evening event with more than 50 high-quality digital influencers.
  - America Journal is the leading special interest magazine focusing on America in the German-speaking market. Together with members of the DNE delegation, GIA represented New England at this event and met with the publishers, editors as well as with freelance journalists.
  - Distributed 600 Reiseplaner and 300 New England maps, as well as 1000 pieces of state literature and maps
  - Visit USA German Media Breakfast was held on Friday morning with 200 journalists in attendance. GIA reserved a table for DNE to discuss story ideas and future fam trips, meeting with several journalists.

**IPW Anaheim, June 02-05, 2019**

- 16 appointments with German-speaking tour operators
TRAININGS

• Sales meetings and trainings in Zurich, Switzerland and Dusseldorf, Frankfurt and Cologne, Germany.

• Seven product meetings and eight one-hour trainings with key tour operators.

VUSA ACTIVITIES

• Attended 3 VUSA Germany meetings

FAMILIARIZATION TRIPS – TRADE

• Post-Summit fam (May)

FAMILIARIZATION TRIPS – MEDIA

• BrandUSA Blogger group fam (June)
  The fam was based on Brand USA’S global United Stories Campaign www.visittheusa.com/unitedstories. BUSA Germany and GIA selected six travel, sustainability and lifestyle bloggers with a good Instagram follower range between 10 and 200k for a road trip story on “Food, sustainability and nature in Northern New England.” The results of this fam will be delivered in a separate document and in the clipping report.

• Freelance travel writer Verena Wolff for dpa (Germany’s largest newswire) and travel magazine Reisen Exklusiv

• Articles sent out by dpa receive great coverage and are published in multiple print and online media outlets. Verena also came to NE in February 2017 to do a story on ski and winter activities on behalf of dpa. The article resulted in more than 120 online and print placements with a combined readership of 57 million and a combined PR value of $2.5 million.

JOINT MARKETING ACTIVITIES

• FTI — $2,800 — Feb. 2019 (4 weeks)

• CANUSA — FOC (Usually > $15K) NE featured without DNE investment and logo placement — Fall 2018

PRESS RELEASES & NEWSLETTERS

• Issued 11 press releases
  o Scenic Drives, Indian Summer
  o Hiking New Hampshire
  o Hollywood of the East Coast
  o Winter Activities
  o New England News 2019
  o Outdoor Mecca, Maine
- New England at ITB Berlin
- Maritime Heritage in Connecticut
- Dive Paradise, Rhode Island
- Beer & Breweries of New England

- Issued 3 B2B and 3 B2C newsletters
- As a result of GIA PR activity, the earned media value was $1,458,387 USD.

FULFILLMENT

GIA manages a dedicated New England phone line (+49 221 4767 12 11); receives requests from consumers as well as the trade; distributes NE fulfillment packages. All fulfillment is being executed by GIA.

CONSUMER REQUESTS

- Fulfilled 103 DNE brochure requests
- Fulfilled 127 requests for various state brochures, with an additional 38 for Boston

TRADE REQUESTS

- Fulfilled requests for 1200 DNE brochures
- Fulfilled requests for 572 New England maps
JAPAN
CONSUMER TRENDS & BEHAVIORS

In 2017, Japan was the second largest overseas source of inbound travelers to the U.S. attracting 3.6 million visitors. The U.S. continues to be one of the most popular destinations for Japanese visitors with a 20 percent market share in Japan. Japanese spending in the U.S. remained high with travel and tourism receipts totaling $16.7 billion, second after China.

Currently, Japan Airlines is the only airline that services Boston from Tokyo with a daily non-stop flight using 787-9 Dreamliner with a total of 196 seats.

The Japanese government allocated 25 Haneda Airport slots to All Nippon Airways (ANA) and Japan Airlines (JAL). ANA received 13.5 and JAL received 11.5 slots. These are in addition to 12 slots that are already allocated to Delta, United, American and Hawaiian. These new allocations will boost Haneda’s yearly international capacity from 60,000 flights to 99,000. Haneda was Tokyo’s main airport until 1978 when Narita was built to relieve traffic on international routes. However, Haneda is once again gaining popularity due to its proximity to the city center. These new routes are scheduled to start in the summer 2020.

The demographic of active senior travelers continues to rise. One out of every four people traveling to the U.S. is over the age of 65, which is 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 U.S. 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—a bout 17% to date. In 2017, inflation was about .47 percent 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

The leading sectors for U.S. travel from Japan include:

- **Senior Travel Market** – Within the Japanese outbound travel market, the senior travel segment shows especially good growth potential for U.S. destinations. Currently, one out of every four people in Japan is over the age of 65, which is over 33 million people (of the total population of 127 million). These individuals have time, money and energy to spend on leisure travel and are the best match for long-haul destinations such as New England.

- **Special Interest Tours (SIT)** – While most Japanese travelers still enjoy nature/scenery, shopping, gourmet food, history and culture, SIT with more specific purpose in mind such as attending sporting events or engaging in favorite activities are increasing. These tourists are interested in...
traveling with others who share the same interests and have the potential to become repeat travelers. The following are examples of themes that appeal to Japanese travelers:

- Spectator sports – baseball, golf, soccer, football and Olympics or World Cups
- Participating in sports activities – golfing, hiking, fishing, diving, skiing and marathons
- Hobby tours – quilting, photo taking, drawing, dancing and cooking

- Cruise Travel – The number of Japanese cruise travelers in 2017 was 315,000, a 27 percent increase over the previous year. Out of 315,000 people, 197,000 traveled overseas. The interests in fly/cruise trips are increasing for the U.S.

FAMILIARIZATION TRIPS – MEDIA

As a result of the Quilt Jikan (Quilting Time) fam in June 2017, Maine was featured in October 2017 for 6 pages ($21,000 value), Massachusetts in December 2017 for 8 pages ($28,000 value), and Connecticut in February 2018 for 7 pages ($24,500 value).

NEWSLETTERS

- Produced and distributed four newsletters

TRADE & CONSUMER SHOWS

- New York City Event, NYC, Nov 13, 2018
  - Table-top reception for Japanese, Chinese and European tour/receptive operators that are based in the New York / New Jersey area
  - 33 New England suppliers participated
  - 56 tour operators attended

- DNE Summit — Foxwoods Resort Casino, Mashantucket, CT, May 13-15, 2019
  - 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 percent and one of the lowest unemployment rates of all time of 5.4 percent. 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.

Australian and New Zealand travelers continue to have some of the most accrued holiday time in the world. An introductory worker receives four weeks of paid vacation time. They are resilient travelers and with air travel price points continuing to decrease, the propensity for multi USA trips in a calendar year has risen. 69 percent of all Australians will plan on taking a trip in the next 12 months. Latest surveys show that 32 percent of Australian travelers are planning a 14- to 20-night trip and 32 percent are planning a 21+ night trip. This is a total of 64 percent of Australian travelers planning a vacation of 14 or more days.

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 9th in all international key markets due to the average length which is 18.7 nights. They book their trip on average at least 162 days in advance of travel and visit at least two states in a region when traveling to a U.S. destination. Repeat visitation is at 73 percent.

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

Expectations from the market are continued growth to the USA between now and 2021 between 3 and 5 percent 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 74,000 visitors from Australia to New England spending $199 million. 78 percent of these visitors are leisure travelers. Over the past two years, visitors coming to visit historic places and small towns have increased from 46 percent to 66 percent as destination awareness grows. During a trip to New England they will visit 3.3 states.
Aussies and Kiwis are very active and experiential travelers. They don’t want to stop for a photo, they want to explore, discover, touch, climb and hike what they see. They don’t want to tick the boxes on the travel list, they want to step out of the box and create an unexpected list. This is why New England is such a great place for Aussies and Kiwis with its diverse range of experiences. All five states offer unique opportunities. It is not a ‘stop and flop’ destination. You can explore beyond gateways and hit the road to find the unexpected.

KEY MARKET INITIATIVES

Visit USA, Brand USA and IMM – February 2019

- DNE was a platinum sponsor at the Visit USA show series in Brisbane, Melbourne, Sydney, Auckland & Wellington.
- 30+ B2B appointment sessions with Australia’s top tour operators.
- 20+ media appointments at Sydney’s International Media Marketplace.
- 950+ agents trained across the five-city program.
- New Hampshire and White Mountain’s Attractions were partners in attendance.

DNE Summit 2019

- Four Australia and New Zealand tour operators attended.
- Special FOC air partnership negotiated with United Airlines to support visiting buyers.

PR

- Created and curated quarterly what’s new release that went out to key market media and trade partners.
- Issued four New England specific press releases:
  - There’s more to New England than you think!
  - Stay, Play, Wine & Dine. There is more to New England than you think...
  - Top classic attractions in the 5 states of New England
  - Your top off-the-beaten-path attractions across the 5 states of New England
- Media visits and earned media coverage:
  - Pitched and generated 86 independent articles in top market publications with an earned media value of $250,843 USD

FAMILIARIZATION TRIPS — MEDIA

- Kylie McLaughlin, Fairfax Media – Sept/Oct 2018
- Cassandra Laffey, Flight Centre Media – Sept 2018
- Sonia Taylor, 9 Travel – Sept 2018
- Alexandra Carlton, Gourmet Traveller / Brands USA – July 2018
FAMILIARIZATION TRIPS — TRADE

- Sell Your Way – Sept 2018

JOINT MARKETING ACTIVITIES

- Adventure World — $5,000: Campaign Value: $23,000 — January – March, 2019
- Hawaiian Airlines Air Launch Boston Service — Supported through Red Sox had contribution — April 2019
- House of Travel — $4,765: Campaign Value: $60,000 — June 2019
IRELAND
CONSUMER TRENDS & BEHAVIORS

Irish residents spent $8 billion on outbound trips in 2018 and spend more than the average visitor while in the U.S. with most of the spending on dining, sightseeing and shopping. The average spend for a two-week Boston/Cape Cod holiday for a family of four is $12,000 to $15,000. The average spend per day is $100 per person.

The Irish plan their trips, on average, 110 days in advance. They are considered well-traveled and undertake several overseas flights each year.

When asked about the biggest travel trends in 2019 so far, agents say all-inclusive cruises have seen a huge surge in popularity. Top long-haul destinations include USA, Canada, Thailand, Mexico, Cuba and Dubai. Top US destinations include Florida, New York, Las Vegas and California.

Ireland is considered to have one of the highest internet user populations across Europe with 70 percent of Irish travelers researching trips online. 65 percent use mobile devices and tablets while on holidays. In a recent survey, 40 percent said they used social media to help select hotels and tourist attractions. More than 60 percent of all bookings made through a travel agent/tour operator utilize dynamic packaging, a method used in package holiday bookings to enable consumers to build their own bundle of flights, accommodation and car rental instead of purchasing a pre-defined package.

THE ECONOMY

Ireland has the fastest growing economy in Europe with an increase of 6.8 percent in 2018 and the estimate for 2019 is an increase of 4.1 percent. The country enjoys a very low unemployment rate of 5.7 percent in 2018 and 2019 is estimated to be 4.3 percent. The GDP per capita is $83,946 (2018).

Ireland has a population of 4.8 million with 33.2 percent of the population less than 25 years old. The average age of the population is 37.4 years. 7 percent of the population is in the 19–24 age group.

There is a minimum of four weeks paid holiday leave plus nine days public holidays.

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

There are deep historic, cultural and business links between Ireland and the U.S., especially New England. Irish residents took 8.3 million outbound trips in 2018, with was an increase of 4.2% over the previous year. Ireland remains the 17th highest country of origin for visitors to the U.S. with 9% growth in travel to U.S. in 2017 (most recent figures).
There are more than four million transatlantic seats to U.S. in 2018 and Ireland continues to have the highest per capita travel to the USA in Europe—third in the world behind Canada and Mexico with an average of 8.82 percent.

The average stay in the U.S. is 10–14 nights, however, three- to four-night short breaks and shopping weekends are increasing in popularity. July is the most popular month for summer vacation with Easter and school holiday also being important travel times.

The U.S. is one of the top three destination choices behind long-time favorites Spain and Portugal.

The U.S. also topped the poll for city break destinations—with New York being the most popular, followed by Barcelona, Rome and Prague.

Boston Logan is the third largest U.S. point of entry airport for Irish travelers (JFK and Newark occupy positions one and two respectively).

**TRADE & CONSUMER SHOWS**

- Tour America Red Cow Consumer Show – September 2018
- Holiday World Show, Dublin – January 2019
- Aer Lingus Roadshow, Belfast, Dublin, Limerick and Cork – February 2019
- DNE Summit, Foxwoods, CT – May 2019

**FAMILIARIZATION TRIPS – TRADE**

- DNE Summit Post Fam Trip – MA, CT, RI – May 2019

**PRESS RELEASES & NEWSLETTERS**

- Issued 14 press releases:
  - Lots of Spooky Things Happening in Salem this Halloween
  - Fresh Winter Breaks in New England
  - Make Your Christmas Shopping a Breeze in Rhode Island
  - Making Thanksgiving Traditions in Connecticut
  - What’s Hot in New England for Irish Visitors in 2019
  - Norman Rockwell Museum Turns 50
  - Oyster Celebration in Damariscotta, Maine
  - Paddle Panoramic in New Hampshire
  - New Massachusetts Trip Planning App
  - Find Your Next Adventure in New Hampshire This Spring
  - Fun in the Water in Connecticut
  - Boating and Yachting in Rhode Island
  - Top 5 Best Kept Brewery Secrets in New Hampshire
  - Literature is King in Maine
• Distributed four electronic newsletters to the trade throughout the year.
• As a result of PR activity, the earned media value was $3,255,000 USD.

JOINT MARKETING ACTIVITIES

There were three recommendations for tour operator joint marketing activities for FY19 based on recent product development and commitment to the region for all states to review and confirm their level of investment. New Hampshire agreed to a joint marketing program with Platinum Travel for $2,500.
ANNUAL TOURISM SUMMIT & INTERNATIONAL MARKETPLACE
ANNUAL TOURISM SUMMIT & INTERNATIONAL MARKETPLACE

May 13 – 15, 2019
Foxwoods Resort Casino, Mashantucket, CT

Participation:

- Delegates – 78 buyers from 73 companies and 14 countries, and 213 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 four post-Summit FAMs (with themes of Outdoor Recreation, Culinary Delight, and History and Culture)
- Highlights included:
  - Market Update: a panel of ten international specialists spoke about the latest trends in their market

Buyers came from:

- Australia/New Zealand (4)
- China (5)
- France (5)
- Germany (2)
- Ireland (2)
- Italy (6)
- Japan (6)
- Netherlands (4)
- Singapore (1)
- Sweden (1)
- Switzerland (1)
- United Kingdom (10)
- USA (29)
- Online travel agencies/operators (2)
TRAVEL WRITERS

• TEAM WADE

PRE & POST FAMS

• Post-Summit FAM New England – MA ME NH
  (10 participants from Germany, Netherlands, Sweden and Switzerland)

• Post-Summit FAM New England – MA CT RI
  (17 participants from New Zealand, Australia, UK and Ireland)

• Post-Summit FAM New England – MA NH
  (8 participants from Italy)

• Post-Summit FAM New England – NH ME
  (6 participants from France)
SOCIAL MEDIA
FACEBOOK

New Organic Likes: 1,845
Total Likes: 11,475
Daily Total Reach: 199,021
*Daily: The number of people who have seen any content associated with your Page. (Unique Users)*

Total Daily Page Engaged Users: 11,371
*Daily: The number of people who engaged with your Page. Engagement includes any click or story created. (Unique Users)*

Daily Total Impressions: 299,816
*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
- Canada
- Colombia
- Denmark
- Egypt
- France
- Germany
- Greece
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Malaysia
- Mexico
- Morocco
- Netherlands
- New Zealand
- Nigeria
- Norway
- Pakistan
- Peru
- Philippines
- Portugal
- Singapore
- South Africa
- South Korea
- Spain
- Sri Lanka
- Sweden
- Switzerland
- Taiwan
- Thailand
- Turkey
- United Arab Emirates
- United Kingdom
- USA
- Vietnam

Fans are coming from 45 different countries:
TWITTER
Total Followers: 3,598
New Followers: 127
Engagement: 382

INSTAGRAM
Media Posted: 130
Followers: 2,004
New Followers: 317

PINTEREST
Total Impressions: 10,378 (1/1/2019 - 6/30/2019)

YOUTUBE
(7/1/2018 – 6/30/2019)
Watch Time: 68.8K minutes
Views: 30.3K
Videos in Playlist: 379
Total Subscribers: 611 (70 new)
Traffic Sources:
  - External: 28.8%
  - YouTube Search: 40.1%
  - Suggested Videos: 19.4%
  - Browse Features: 3.4%
  - Other YouTube Features: 2.9%
  - Other: 5.3%
WEBSITE
MAIN SITE

- The DNE website had 548,349 unique visitors in 2019
- 45.58% of users visited via mobile devices (12.25% via tablet)
- There were 66,887 unique visits to the visitor guide
- Top landing pages:
  - Fall Foliage Maps
  - New England Maps
  - New England States
  - Beaches
  - New England Weather
  - Quick Facts
  - New England Fall
  - New England Summer
  - Train Rides
  - Train Travel in New England

OTHER KEY STATISTICS

- Avg. bounce rate: 51.71%
- New visitors: 89%
- Page views: 1,182,171

REFERRALS FROM SOCIAL NETWORKS

- Pinterest — 3,944
- Facebook — 1,905
- Reddit — 257
- YouTube — 33
- TripAdvisor — 29
- Twitter — 26
- Pocket — 15
- Instagram — 12
- BuzzFeed — 9
- LinkedIn — 8
GERMAN SITE

- Avg bounce rate: 46%
- Unique visitors: 30,425
- Mobile: 40.61%, 12,255 visits
- Top landing pages:
  - Beaches
  - Attractions in Boston
  - Things to do in Boston
  - New England States
  - New England Weather
  - Whale Watching
  - Seasons
  - Walking and Hiking
  - Fall Foliage Maps
  - Getaways with Children - Southern Tour
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