



Office of Travel & Tourism

massvacation.com

MOTT TravelStats Newsletter - December 2009

MOTT TravelStats is a monthly newsletter tracking indicators of travel activity in Massachusetts, as well as MOTT activity. If you have comments or questions regarding the contents of this newsletter, send e-mail to Tony.Dagostino@state.ma.us.

Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: November 2009

- During the month of November 2009, Massachusetts state wide lodging room demand (1,213K) increased 0.4% compared to November 2008 (1,209k). The average daily room rate between these two periods decreased by 8.4% to \$122.16 from \$133.36. Occupancy rates, which reflect changes in both supply and demand for rooms decreased by 0.3 percentage points to 53.0 from 53.3 percent. Overall room revenue decreased 8.1% to \$148.2 mil from \$161.2 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CY2009 over same period in CY2008 by 15% to \$77.59 from \$91.27. Occupancy was down 6.8% and the room rate decreased by 8.8%.

Massachusetts Hotel Lodging Data

Month of November

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	1,213	122.16	53.0	148.2
2008	1,209	133.36	53.3	161.2
2007	1,343	143.49	60.1	192.7

REVPAR- Calendar Year 2009 thru November

Year	(\$'s)	% Change
2009	77.59	-15.0
2008	91.27	0.5
2007	90.82	7.5

Source: Smith Travel Research, Inc. (STR). Any re-use of this data without the written permission of STR is prohibited.

Room Occupancy Taxes: November 2009 and (Fiscal Year 2010)

- For the month of November 2009 (FY09), the net room occupancy tax collections of \$16.8 million decreased by 5% from the November 2008 (FY09) collections of \$17.6 million. The November 2008 collections were a 11% decrease over the November 2007 (FY08) collections of \$19.8 million.
- For FY2010 to date thru November 2009, net room occupancy tax collections totalled \$80.8 million, a 12% decrease from the same period of FY09. The FY09 collections of \$91.8 million were 0.7% less than the FY08 collections of \$92.4 million.

Total Room Occupancy Tax Collections

Month of November

Year	\$ (000)	% Change
FY2010	16,763	-5.0
FY2009	17,638	-11.0
FY2008	19,810	17.6

FY2010 thru November

Year	\$ (000)	% Change
FY2010	80,794	-12.0
FY2009	91,761	-0.7
FY2008	92,411	10.7

Source: Mass DOR Monthly Report of Collections and Refunds

Ma Tourism Fund (MTF) Collections: June 2009 (FY2009)

The final FY2009 collections totaled \$38.3 million. The FY2009 collections were 8.0% lower than the FY2008 collections (\$38.3 million v. \$41.7 million).

Please note: The MA DOR is correcting mistakes made in the recent blue book reports which incorrectly placed the MTF amounts in the general revenue line item. Corrections will be made in the near future according to MA DOR.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: November 2009 and CYTD 2009

Massachusetts' museum and attraction attendance increased 1.3% in the month of November 2009 compared to November 2008 (794,655 visitors v. 784,538 visitors). The total net visitor increase was 10,117 at the 59 institutions reporting visitor data.

For calendar year 2009 thru November attendance was down 0.1% to 11,493,151 from the 11,508,606 attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: November 2009

- In **November** 2009, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.7 million, an increase of 8.9% from the November 2008 total of 1.6 million. Calendar year to date thru November the total was 20.1 million down 1.8%.
- The number of **international passenger** arrivals and departures increased in November 2009 by .9% compared to November 2008 to 246k from 248k. The calendar year to date thru November totals are down 7.6% to 3,439k from 3,720k.

Domestic Passenger Volume

November	(000)s	% Change
2009	1,742	8.9
2008	1,600	-15.8
2007	1,900	-2.9

International Passenger Volume

November	(000)s	% Change
2009	246	-0.9
2008	248	-16.5
2007	297	11.0

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	20,069	-1.8
2008	20,428	-7.9
2007	22,178	1.9

International Passenger Volume

CYTD	(000)s	% Change
2009	3,439	-7.6
2008	3,720	-3.6
2007	3,861	2.4

(Source: Massport)

Domestic Visitation to Massachusetts CY2008:

Domestic Visitors' Origin: Top states and regions, CY2008

<u>Origin</u>	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	5,270,000	30.6%
New York	2,523,000	14.7%
Connecticut	1,740,000	10.1%
New Hampshire	886,000	5.1%
Rhode Island	804,000	4.7%
Maine	683,000	4.0%
New Jersey	640,000	3.7%
California	578,000	3.4%
Florida	550,000	3.2%
Pennsylvania	524,000	3.0%
Vermont	290,000	1.7%
Virginia	204,000	1.2%
All Other States	2,519,000	14.6%
All New England States	9,671,000	56.2%
All Mid Atlantic States	3,687,000	21.4%

There was a 6.5% decrease in domestic visitation to MA in CY2008 (17.2 mil) compared to CY2007 (18.4 mil). The primary trip purpose in CY2008 was visiting friends and/or relatives, the top activity was attending a family/social event, and almost 70% of visitors arrived in their own vehicle. Of the visitors that stayed overnight, nearly 50% stayed in a hotel/motel/inn or B&B. Please see the Travel Industry Report on massvacation.com for more details.

International Visitors to Massachusetts in CY2008 and to U.S. in CY2009

	Visitors to Massachusetts		Visitors to U.S. change in CY09 thru October
	2008 Visitors (000s)	2008 SHARE of U.S. MARKET	
ALL OVERSEAS	1,267	5.0%	-8.3%
WESTERN EUROPE	720	5.9%	-11.1%
Canada	635	3.4%	-6.7%
United Kingdom	237	5.2%	-14.8%
Germany	123	6.9%	-5.9%
Japan	62	1.9%	-12.4%
Ireland	52	9.7%	-23.0%
France	57	4.6%	-3.2%
Italy	58	7.5%	-5.7%
Netherlands	33	5.4%	-10.8%
Brazil	45	5.9%	13.9%
Spain	32	4.9%	-11.0%
Argentina	16	5.1%	10.6%

Travel to Massachusetts from MOTT target markets in CY2008

Estimated OVERSEAS visits to Massachusetts during **CY2008** was just under **1.3 million**. This was an 8.2% increase over the **CY2007** estimate of **1.2 million**.

Historically, the top five origin countries to visit MA have been Canada, the United Kingdom, Germany, France and Italy.

Travel to U.S. from MOTT target markets CYTD thru October 2009

For CY 2009 through October 2009, visitation from Canada to U.S. has dropped 6.7%, while visits from Western Europe have declined 11.1% compared to same period in CY 2008.

Source: Dept of Commerce, OTTI

Please see the chart below for domestic and international spending data in MA for **CY2008**.

Direct Economic Impact of Travel and Tourism, CY2008

Domestic and International traveler expenditures totaled \$15.6 billion in MA during 2008, up 2.9% from 2007. Domestic traveler spending increased 1.4% while international traveler spending increased 13.3 %. Total expenditures generated \$962.7 million in state and local taxes for MA.

<i>2008 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$4,419.0	\$265.3	\$4,684.3
Auto Transportation	2,016.5	29.2	2,045.8
Lodging	2,851.4	712.6	3,564.0
Foodservice	2,605.4	375.9	2,981.3
Entertainment & Recreation	790.2	165.7	955.9
General Retail Trade	857.0	488.5	1,345.5
2008 Totals	\$13,539.5	\$2,037.3	\$15,576.8

Direct travel expenditures in the U.S. in CY2008 totaled \$773 billion.

A traveler is defined as one who travels more than 50 miles from home one way to a destination or who stays at a destination overnight.

(Source: TIA, The Economic Impact of Travel on Massachusetts Counties, 2008)

MASSVACATION.COM Activity: December 2009 & Calendar Year 2009

The **MASSVACATION.COM** site had **49,027 visits** in **December 2009**, up 12.5% from the 43,573 in December 2008. Additionally, there were **187,116 page views** in December, down 11.3% from the **210,878** in 2008. The average time on the site went up by 11.0% to **2 minutes 46 seconds**. The **Holiday Events** page had the most views with **6,569**

For CY2009, the total **visits** were **985,965 (down 2.1% from CY2008)** and the **pageviews** were **5.4 million (down 3.2%)**. The average time on the site was **4 minutes 3 seconds (up 7.5%)**. The **United States** generated the most website visits with **850,159 (down 4.4%)**. **Canada** followed with **41,390 (up 15.6%)** and the **United Kingdom** was third with **18,155 (up 3.9%)**. The **Mass Value Pass** page had the most visits for CY2009 with **539,277 pageviews**. The top three region pages were Cape Cod and the Islands (**96,337 views**), Greater Boston (**81,645**) and Western Mass (**74,120**)

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Distribution: December 2009

The total number of **2009 Getaway Guides** distributed in **December** was 32,000. Of these, **1,926** were **individual requests** from **FARM** (the online fulfillment system). Most of the remaining guides were sent to travel shows and small amounts went to major information centers across the state, hotels and motels, and parks and campgrounds .

For calendar year 2009 just under 720,000 Getaway Guides have been distributed to interested consumers. Off this total, 85k requests have come thru **FARM**.

(Source: FARM Monthly Report & MOTT Fulfillment Dept.)

Lesbian Gay Bisexual Transgender (LGBT) data: December 2009

The Community Marketing, Inc. 13th Annual LGBT Tourism Study found that **Boston** ranked **9th** with **17.1%** visitation among cities visited in the last 12 month for **Leisure (11.5%)** and **Business (5.6%) purposes** by the LGBT community.

The Massachusetts' **LGBT microsite** was launched on January 23, 2009 and the site utilization has been very high. Since inception thru December 2009 there have been 65,347 visits and over 145,661 pageviews.

The top five information pages viewed were capemass, marriage, bostonmass, westmass, and southmass.

MOTT Updates and Activities from Tony D'Agostino: January 2010

Looking forward to seeing many of you at the 23rd Annual Governor's Conference on Travel and Tourism on Wednesday March 24th, 2010 at The Park Plaza Hotel in Boston. For more information please contact Dagny Ashley at MOTT.

Thanks to MOTT intern Valerie Small for pulling this edition of TravelStats together.