



MOTT TravelStats Newsletter -December 2010

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 2010

- During the month of November 2010, Massachusetts statewide lodging room demand (1,257.9k) increased 5.9% compared to November 2009 (1,187.9k). The average daily room rate between these two periods increased by 4.2% to \$128.27 from \$123.10. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 3.5 percentage points to 55.8 from 52.3 percent. Overall room revenue increased 10.3% to \$161.4 mil from \$160.6 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD November over same period last year by 11.5% to \$86.88 from \$77.94. Occupancy was up 9.2% and the room rate increased 2.0%.

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

Massachusetts Hotel Lodging Data

Month of November

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2010	1,257.9	128.27	55.8	161.4
2009	1,187.9	123.10	52.3	146.2
2008	1,194.3	134.46	53.0	160.6

REVPAR- Calendar Year 2010, thru November

Year	(\$'s)	% Change
2010	86.88	11.5
2009	77.94	-14.9
2008	91.58	0.8

State Room Occupancy Taxes: November 2010 & Fiscal Year 2011

- For the month of November 2010 (FY11), the net room occupancy tax collections of \$18.7 million increased by 11.4% from the November 2009 (FY10) collections of \$16.8 million. The November 2009 collections were a 5.0% decrease from the November 2008 (FY09) collections of \$17.6 million.
- For FY2011 YTD net room occupancy tax collections totalled \$89.4 million, a 10.7% increase from FY10. The FY10 collections of \$80.8 million were 12.0 % less than the FY09 collections of \$91.8 million.

Source: Mass DOR Monthly Report of Collections and Refunds

State Room Occupancy Tax Collections

Month of November

Year	\$ (000)	% Change
FY2011	18,666.3	11.4
FY2010	16,762.7	-5.0
FY2009	17,640.0	-11.0

FYTD Thru November

Year	\$ (000)	% Change
FY2011	89,412.0	10.7
FY2010	80,793.7	-12.0
FY2009	91,761.3	-0.7

Local Option Room Occupancy Taxes: November 2010 & Fiscal Year 2011

- For the month of October 2010 (FY11), the local option room occupancy tax collections of \$14.7 million increased significantly (note: new law allowed local option tax rate increases in communities) from the November 2009 (FY10) collections of \$12.2 million. The November 2009 collections were a 25.1% increase from the November 2008 (FY09) collections of \$9.7 million.
- For FY2011 YTD, local option room occupancy tax collections totaled \$70.3 million, a 44.8% increase from FY10. (See note above) The FY10 collections of \$48.5 million were 6.7 % less than the FY09 collections of \$52.0 million.

Local Room Occupancy Tax Collections

Month of November

Year	\$ (000)	% Change
FY2011	14,681.8	20.8
FY2010	12,154.8	25.1
FY2009	9,714.6	-10.1

FYTD thru November

Year	\$ (000)	% Change
FY2011	70,250.0	44.8
FY2010	48,522.3	-6.7
FY2009	51,994.8	-0.5

Source: Mass DOR Monthly Report of Collections and Refunds

Ma Tourism Fund (MTF) Collections, thru November: FYs 2011, 2010, & 2009

The November 2010(FY2011) MTF collections totaled \$21.3 million which was an 8.7% increase from the \$19.6 million collected during the same period in FY2010. The FY2010 collections were 12.6% less than the FY2009 collections of \$22.4 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: November 2010 and CYTD 2010

Massachusetts' museum and attraction attendance decreased 1.6% in the month of November 2010 compared to November 2009 (760,649 visitors v. 773,031 visitors). The total net visitor decrease was 12,382 at the 59 institutions reporting visitor data.

For calendar year 2010 thru November attendance is up 0.6% to 11,133,750 from the 11,066,660 during the same period in CY2009, an increase of 67,090 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: November 2010 and CYTD 2010

- In **November 2010**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled just over 2.0 million, an increase of 14.9% from the November 2009 total of just 1.7 million. The CYTD2010 thru November total was 21.9 million, up 9.0% from the 20.1 million last year.

- The number of **international passenger** arrivals and departures decreased in November 2010 by 1.6% compared to November 2009 to 242k from 246k. The CYTD thru November totals were up 0.3% to 3.45 million from 3.44 million last year.

Domestic Passenger Volume

November	(000)s	% Change
2010	2,001	14.9
2009	1,742	8.9
2008	1,600	-15.8

International Passenger Volume

November	(000)s	% Change
2010	242	-1.6
2009	246	-0.9
2008	248	-16.5

Domestic Passenger Volume

CYTD November	(000)s	% Change
2010	21,868	9.0
2009	20,069	-1.8
2008	20,428	-7.9

International Passenger Volume

CYTD November	(000)s	% Change
2010	3,450	0.3
2009	3,439	-7.6
2008	3,720	-3.6

Source: MASSPORT



Domestic Visitation to Massachusetts FY2010:

Domestic visitors' origin, number of trips (visits) and percentage of total trips.

<u>Origin State</u>	<u>Person trips</u>	<u>Share of all trips</u>
Massachusetts	4,942,000	29.7%
New York	2,381,000	14.3%
Connecticut	1,557,000	9.3%
New Hampshire	820,500	4.9%
Rhode Island	700,000	4.2%
California	526,000	3.2%
Florida	578,000	3.5%
New Jersey	771,000	4.6%
Maine	688,000	4.1%
Virginia	197,000	1.2%
Pennsylvania	564,500	3.4%
Vermont	448,500	2.7%
Sub Total	14,173,500	85.1%
All Other States	2,481,500	14.9%
All New England States	9,157,000	55.0%
All Mid Atlantic States	3,217,000	22.3%

Source:TNS, Travels America, FY2010

The total domestic trips to Massachusetts in FY2010 were 16.1 million. The primary trip purpose in FY2010 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.

Source:TNS, Travels America, FY2010

International Visitors to MA in CY2009 and to U.S. in CY2009 and CY2010

	Visitors to Massachusetts		CY2009 change in Visitors to U.S.	CY2010 thru November change in Visitors to U.S.
	2009 Visitors	2009 SHARE of U.S. MARKET		
	(000s)			
ALL OVERSEAS	1,259	5.3%	-6.3%	11.1%
WESTERN EUROPE	648	5.9%	-10.0%	3.6%
Canada	635	3.4%	-5.0%	11.3%
United Kingdom	187	4.8%	-14.6%	-0.5%
Germany	110	6.5%	-5.4%	2.9%
Japan	38	1.3%	-10.2%	17.2%
Ireland	36	8.7%	-22.6%	-11.5%
France	65	5.4%	-3.2%	11.5%
Italy	51	6.8%	-3.4%	12.0%
Netherlands	45	8.3%	-9.9%	4.3%
Brazil	57	6.4%	16%	35.1%
Spain	21	3.5%	-9.4%	7.2%
Argentina	20	5.5%	12%	22.6%

Travel to Massachusetts from MOTT target markets in CY2009

Estimated OVERSEAS visits to Massachusetts during **CY2009** was just under **1.259 million**. This was a slight decrease from the **CY2008** estimate of **1.267 million**.

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

Massachusetts market share of Overseas and Canadian visitation for CY2009

For CY2009, Massachusetts captured 5.3% of all Overseas travel to the U.S., up from a 5.0% marketshare in CY2008. Market share of visitation from Canada to MA was 3.4% in CY2009, unchanged from 2008.

Travel to U.S. from MOTT target markets thru November 2010

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 11.3 thru November, visits from western Europe were up 3.6% while all Overseas visitation was up 11.0%.

Source: Dept of Commerce, OTTI



Direct Economic Impact of Travel and Tourism, CY2009

Domestic and International traveler expenditures totaled \$14.4 billion in MA during 2009, down 7.8% from 2008. Domestic traveler spending decreased 8.3% while international traveler spending decreased 5.1%. Total expenditures generated \$962.7 million in state and local taxes for MA.

<i>2009 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$3,893.3	\$237.8	\$4131.1
Auto Transportation	1,811.9	26.6	1,838.4
Lodging	2,467.5	628.0	3,095.5
Foodservice	2,601.6	379.3	2,980.9
Entertainment & Recreation	791.2	164.0	955.2
General Retail Trade	853.7	497.8	1,351.5
2009 Totals	\$12,419.2	\$1,933.5	\$14,352.6

Impact of Domestic Travel on MA Counties, 2009

<u>County</u>	Expenditures	Payroll	Employment	State Tax	Local Tax
	(\$ Millions)	(\$ Millions)	(Thousands)	Receipts	Receipts
				(\$ Millions)	(\$ Millions)
Barnstable	\$785.18	\$212.46	8.53	\$33.20	\$45.51
Berkshire	308.96	84.87	3.49	15.50	8.28
Bristol	361.50	79.45	2.92	19.37	6.84
Dukes	104.81	27.78	1.14	4.02	5.94
Essex	634.88	156.99	6.00	34.03	16.08
Franklin	47.26	9.53	0.35	2.69	1.50
Hampden	419.55	92.93	3.17	23.24	8.04
Hampshire	96.16	22.49	0.83	5.22	2.55
Middlesex	1,856.80	520.51	19.21	102.06	47.91
Nantucket	136.85	29.52	0.99	3.99	4.60
Norfolk	791.57	256.65	9.06	42.51	16.81
Plymouth	446.49	95.55	3.61	21.89	19.86
Suffolk	5,781.23	1,206.95	39.83	152.68	103.91
Worcester	647.93	133.81	5.22	34.80	14.01
Statewide	\$12,419.16	\$2,929.50	104.35	\$495.20	\$301.84

Source: USTA Economic Impact of Travel on MA Counties, 2009



MASSVACATION.COM Activity: December 2010 and Calendar Year 2010

The **MASSVACATION.COM** site had **33,520 visits** in December **2010**, down 32% from the 49,027 in December 2009. Additionally, there were **124,845 page views** in December, down 33% from the **187,116** the prior December. The average time on the site went down 4% to **2 minutes 39 seconds**. The most visited page, **Holiday Events (a new page)**, had 5,768 view. **Visits** originating in the U.S. decreased by 32% to 28,299. Visits from Canada decreased 37% to 931 and Visits from the U.K. decreased 33% to 587. Visits originating in Germany increased 7% to 612.

For **CY2010** the total **visits** were **952,880 down 3% from the 985,965 in CY2009** and the **pageviews were down 18% to 4.5M from 5.4M**. The average time on the **site was 3 minutes 31 seconds** (down 13%). The **United States** generated the most website visits with **822,775** (down 3%). **Canada** followed with **42,754** (up 3%) and the **United Kingdom** was third with **17,061**(down 6%). The **Find Lodging (147k)**, **Fall Foliage (108k)** and **50 under 50\$ (104k)** page had the most view in 2010. The top region page was **Cape Cod and the Islands** with **97k**.

Source: MOTT- (Google Analytics)

Lesbian Gay Bisexual Transgender (LGBT) data: December 2010 & Calendar Year 2010

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 February 23, 2009 and the site utilization has been very high. Since inception thru December 2009 there were 65,347 visits and 145,661 pageviews.

In December 2010 there were 7,253 visits and 20,243 page views. Calendar Year to date thru December there were 80,618 visits and 186,890 page views.

The top information pages viewed were blog, contest, iphone xdirectory, capemass, bostonmass, and westmass.

(Source: CMI and MOTT)



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

Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities.