



Office of Travel & Tourism

massvacation.com

MOTT TravelStats Newsletter -November 2008

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: October 2008

- During the month of October 2008, Massachusetts state wide lodging room demand (1,725k) decreased 5.3% compared to October 2007 (1,822k). The average daily room rate between these two periods decreased by 4.3% to \$151.95 from \$158.70. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 5.1 percentage points to 69.8% from 74.9%. Overall room revenue decreased 9.3% to \$262.17 mil from \$289.19 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD thru October 2008 over 2007 by 1.3% to \$91.98 from \$90.76. Occupancy was down 1.4% and the room rate was up 2.8%.

Massachusetts Hotel Lodging Data

Month of October

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2008	1,725	151.95	69.8	\$262.17
2007	1,822	158.70	74.9	\$289.19
2006	1,717	143.26	71.5	\$245.99

REVPAR- CYTD thru October

Year	(\$'s)	% Change
2008	91.98	1.3
2007	90.76	6.4
2006	85.34	10.9

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

Room Occupancy Taxes: October 2008 (Fiscal Year 2009)

- For the month of October 2008, the net room tax collections of \$17.3 million decreased by 2.7% over the October 2007 (FY08) collections of \$17.8 million. The October 2007 collections were a 14.0% increase over the October 2006 (FY07) collections of \$15.6 million.
- For the Fiscal Year 2009 thru October 2008, net room occupancy tax collections totalled over \$74.1 million, a 2.1% increase over the same period of FY08. The FY08 collections of \$72.6 million were 9.0% more than FY07.

Total Room Occupancy Tax Collections

Month of October

Year	\$ (000)	% Change
FY2009	17,316	-2.7
FY2008	17,795	14.0
FY2007	15,604	4.7

FYTD thru Oct Year	\$ (000)	% Change
FY2009	74,123	2.1
FY2008	72,602	9.0
FY2007	66,603	10.5

Source: Mass DOR Monthly Report of Collections and Refunds

Ma Tourism Fund (MTF) Collections: FYTD October 2008 (FY09)

The October 2008(FY2009), Massachusetts Tourism Fund collections were up 0.1% compared to the October 2007 (FY2008) collections (\$18.30 million v. \$18.29 million). The FYTD October 2007 collections were 6.7% higher than the October 2006 (FY2007) collections (\$18.29 million v. \$17.14 million).

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: October 2008

Massachusetts' museum and attraction attendance increased 1.8% in the month of October 2008 compared to October 2007 (1,122,335 visitors v. 1,102,599 visitors). The total net visitor increase was 19,736 at the 57 institutions reporting visitor data. Calendar year to date thru October attendance is up 2.5% to 10,802,880 from the 10,537,050 attendees during the same period in 2007.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: October 2008

- In **October 2008**, the number of **domestic passengers** arriving to and departing from Logan International Airport totaled 1.865 million, a decrease of 11.1% from the October 2007 total of 2.099 million. Calendar year to date the volume is down 11.7% from prior year.
- The number of **international passenger** arrivals and departures decreased in October 2008 by 11.7% compared to October 2007. CYTD the volume is down by 2.6% from prior year.

Domestic Passenger Volume

October	(000)	% Change
2008	1,865	-11.1
2007	2,099	0.5
2006	2,089	7.5

International Passenger Volume

October	(000)	% Change
2008	315	-11.7
2007	355	7.3
2006	331	-3.7

Domestic Passenger Volume

CYTD thru October	(000)	% Change
2008	18,828	-7.2
2007	20,278	2.4
2006	19,805	3.4

International Passenger Volume

CYTD thru October	(000)	% Change
2008	3,472	-2.6
2007	3,564	1.8
2006	3,502	-4.6

(Source: Massport)

Domestic Visitation to Massachusetts FY2008:

Domestic Visitors Origin: Top 10 States, FY2008

<u>Origin</u>	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	6,733,000	34.7%
New York	2,500,000	12.9%
Connecticut	1,997,000	10.3%
New Hampshire	1,022,000	5.3%
Rhode Island	800,000	4.1%
California	631,000	3.3%
Florida	626,000	3.2%
New Jersey	575,000	3.0%
Maine	525,000	2.7%
Virginia	401,000	2.1%
Pennsylvania	386,000	2.0%
Vermont	380,000	2.0%
All Other States	2,803,000	14.5%
All New England States	11,457,000	59.1%
All Mid Atlantic States	3,461,000	17.9%

There was a 3.8% increase in domestic visitation to MA in FY2008 compared to FY2007. The primary trip purpose in FY2008 was visiting friends and/or relatives, the top activity was attending a family/social event, and 66% of visitors arrived in their own vehicle. Of the visitors that stayed overnight, 47% stayed in a hotel/motel/inn or B&B.

International Visitors to Massachusetts in CY2007 and to U.S. in CY08

	Visitors to Massachusetts		Percentage change in visitors to U.S. in CY08 thru September
	2007 Visitors (000s)	2007 SHARE of MARKET	
ALL OVERSEAS	1,171	4.9%	9.1%
WESTERN EUROPE	684	5.9%	16.7%
Canada	604	3.6%	11.5%
United Kingdom	243	5.4%	6.1%
Germany	85	5.6%	19.8%
Japan	64	1.8%	-6.1%
Ireland	48	9.7%	15.7%
France	47	4.7%	28.1%
Italy	41	6.7%	28.7%
Netherlands	28	5.6%	25.6%
Brazil	28	4.4%	21.1%
Spain	28	5.4%	36.1%
Argentina	18	6.7%	21.4%

Travel to Massachusetts

Estimated international visitation (ALL OVERSEAS plus Canada) to Massachusetts during **CY2007** was just under **1.8 million**. This was a 6% increase over the **CY2006** estimate of **1.7 million**.

Canadian visitors accounted for more than a third of all international visits to MA in **CY2007** at just over 604,000.

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

All travel to U.S.

For **CY2007**, international visitation to the U.S. increased by 11% to 56.7 million. Canadian visitation increased by 10.9% while overseas visitation increased 10.3%. Western European visitors to the U.S. increased by 12.6%

Data from OTTI for **CY2008 thru September** still show significant increases in **total visitors to the U.S.** from **Overseas (up 9.1%)**, **Western Europe (up 16.7%)** and **Canada (up 11.5%)** suggesting good news for MA also.

Source: (Dept. of Commerce, OTTI) and StatsCanada

Please see the chart below for domestic and international spending data in MA for **CY2007**.

Direct Economic Impact of Travel and Tourism, CY2007

Domestic and International travelers directly spent over \$15.1 billion in Massachusetts during CY2007, up 6.6% from CY2006. Domestic traveler spending increased 6% while international traveler spending (helped by the strength of foreign currencies) increased 11.1%. TOTAL expenditures generated \$943.5 million in state and local taxes for Massachusetts.

<i>2007 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$4,392.9	\$231.9	\$4,624.8
Auto Transportation	1,908.7	24.6	1,933.3
Lodging	2,856.6	641.9	3,498.5
Foodservice	2,548.3	327.7	2,876.0
Entertainment & Recreation	769.4	148.6	918.0
General Retail Trade	870.5	423.4	1,293.9
2007 Totals	\$13,346.5	\$1,798.1	\$15,144.6

Direct travel expenditures in the U.S. in CY2007 totaled \$700 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, 2007)

MASSVACATION.COM Activity: November 2008

The **MASSVACATION.COM** site had **31,649 unique visits** in November 2008. Additionally, there were **161,311 page views**. Both these values were slight decreases from November 2007 when there were **34,389 unique visits** and **187,748 page views**.

For **Q3 CY2008** (July, August, September), the total **unique visits** were 258,397 and the **page views** were 1,622,869. The **median length** of a visit was 4 minutes and 33 seconds. Visitors from the **United States** visited the website most frequently with 221,871 sessions. **Canada** followed with 11,841 visits and the **United Kingdom** was third with 5,689 visits.

Also for **Q3** (and other than the homepage) the **find lodging page** was visited more than any other page on the website (38,214 visits). Of the pages that individually profiled regions or super regions **Cape Cod** (32,865 visits), **Western Mass** (31,609 visits), and **Greater Boston** (30,219 visits) were the top three. The **Tours Information** page was the number 4 visited page with 31,929 visits. Additionally, the **90 Spots** and **50 under 50 pages** were in the top ten with 28,079 and 26,447 visits respectively.

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Individual and Bulk Distribution: November 2008

The total number of **2008 Getaway Guides** distributed in November was **7,925**. Of these, **1,439** were **individual requests from FARM** (the online fulfillment system), 2,520 went to visitor information centers and there were 116 individual requests for the **Student Guide Kit**. The remaining guides were sent to legislators, AAA travel offices and hotels/motels across the state..

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

Lesbian Gay Bisexual Transgender (LGBT): November 2008

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%)** by the LGBT community.

MOTT Updates and Activities from Tony D'Agostino: December 2008

Please note that the 22nd Annual Governor's Conference on Travel & Tourism will be held on March 27, 2009 at The Westin Boston Waterfront Hotel.

Also, don't forget to visit the Boston Globe travel show February 20-22, 2009 at the Seaport World Trade Center in Boston.