



**Office of Travel & Tourism**

massvacation.com

**MOTT TravelStats Newsletter - September 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](mailto:Tony.Dagostino@state.ma.us).

**Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: August 2009**

- During the month of August 2009, Massachusetts state wide lodging room demand (1,788k) decreased 3.9% compared to August 2008 (1,862k). The average daily room rate between these two periods decreased by 8.4% to \$140.93 from \$153.87. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 3.7 percentage points to 71.7% from 75.4%. Overall room revenue decreased 12.0% to \$252.0 from \$286.4 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CY2009 over same period in CY2008 by 16.7% to \$74.69 from \$89.71. Occupancy was down 9.1% and the room rate decreased by 8.4%.

**Massachusetts Hotel Lodging Data**

Month of August

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	1,788	140.93	71.7	252.0
2008	1,862	153.87	75.4	286.4
2007	1,869	145.95	76.9	272.7

REVPAR- Calendar Year 2009 thru August

Year	(\$'s)	% Change
2009	74.69	-16.7
2008	89.71	5.4
2007	85.11	4.4

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

**Room Occupancy Taxes: August 2009 and (Fiscal Year 2010)**

- For the month of August 2009 (FY09), the net room occupancy tax collections of \$17.1 million decreased by 10.9% from the August 2008 (FY09) collections of \$19.2 million. The August 2008 collections were a 3.1% increase over the August 2007 (FY08) collections of \$ 18.6 million.
- For the August 2009 (Fiscal Year 2010), net room occupancy tax collections totalled \$31.4 million, a 15.3% decrease from the same period of FY09. The FY09 collections of \$ 37.0 million were 3.4 % more than the FY08 collections of \$ 35.8 million.

**Total Room Occupancy Tax Collections**

Month of August

Year	\$ (000)	% Change
FY2010	17,113	-10.9
FY2009	19,206	3.1
FY2008	18,637	2.9

August (FY 2010)

Year	\$ (000)	% Change
FY2010	31,378	-15.3
FY2009	37,016	3.4
FY2008	35,777	5.2

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: August 2009 and CYTD 2009

Massachusetts' museum and attraction attendance decreased 7.7% in the month of August 2009 compared to August 2008 (1,498,937 visitors v. 1,624,197 visitors). The total net visitor decrease was 125,260 at the 58 institutions reporting visitor data.

For all of calendar year 2009 thru August attendance was down 0.6% to 8,695,609 million from the 8,747,706 million attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

## Logan International Airport Passenger Volume: August 2009

- In **August 2009**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.13 million, an increase of 1.5% from the August 2008 total of 2.1 million. Calendar year to date thru August the total was 14.5 million down 5.0%.
- The number of **international passenger** arrivals and departures decreased in August 2009 by 6.5% compared to August 2008 to 402k from 430k. Calendar year to date totals thru August are down 9.8% to 2,553k from 2,827k.

**Domestic Passenger Volume**

August	(000)s	% Change
2009	2,126	1.5
2008	2,096	-9.1
2007	2,307	6.0

**International Passenger Volume**

August	(000)s	% Change
2009	402	-6.5
2008	430	-2.8
2007	442	10.3

**Domestic Passenger Volume**

CYTD	(000)s	% Change
2009	14,527	-5.0
2008	15,293	-6.3
2007	16,325	2.7

**International Passenger Volume**

CYTD	(000)s	% Change
2009	2,553	-9.8
2008	2,827	-0.5
2007	2,844	0.6

(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
<b>Massachusetts</b>	5,270,000	30.6%
<b>New York</b>	2,523,000	14.7%
<b>Connecticut</b>	1,740,000	10.1%
<b>New Hampshire</b>	886,000	5.1%
<b>Rhode Island</b>	804,000	4.7%
<b>Maine</b>	683,000	4.0%
<b>New Jersey</b>	640,000	3.7%
<b>California</b>	578,000	3.4%
<b>Florida</b>	550,000	3.2%
<b>Pennsylvania</b>	524,000	3.0%
<b>Vermont</b>	290,000	1.7%
<b>Virginia</b>	204,000	1.2%
<b>All Other States</b>	2,519,000	14.6%
<b>All New England States</b>	9,671,000	56.2%
<b>All Mid Atlantic States</b>	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 JULY
	2008 Visitors (000s)	2008 SHARE of U.S. MARKET	
<b>ALL OVERSEAS</b>	<b>1,267</b>	<b>5.0%</b>	<b>-9.8%</b>
<b>WESTERN EUROPE</b>	<b>720</b>	<b>5.9%</b>	<b>-11.2%</b>
<b>Canada</b>	<b>635</b>	<b>3.4%</b>	<b>-9.0%</b>
<b>United Kingdom</b>	<b>237</b>	<b>5.2%</b>	<b>-16.9%</b>
<b>Germany</b>	<b>123</b>	<b>6.9%</b>	<b>-7.4%</b>
<b>Japan</b>	<b>62</b>	<b>1.9%</b>	<b>-17.6%</b>
<b>Ireland</b>	<b>52</b>	<b>9.7%</b>	<b>-19.4%</b>
<b>France</b>	<b>57</b>	<b>4.6%</b>	<b>-1.1%</b>
<b>Italy</b>	<b>58</b>	<b>7.5%</b>	<b>-4.1%</b>
<b>Netherlands</b>	<b>33</b>	<b>5.4%</b>	<b>-12.2%</b>
<b>Brazil</b>	<b>45</b>	<b>5.9%</b>	<b>8.3%</b>
<b>Spain</b>	<b>32</b>	<b>4.9%</b>	<b>-9.3%</b>
<b>Argentina</b>	<b>16</b>	<b>5.1%</b>	<b>10.6%</b>

**Travel to Massachusetts from MOTT target markets in CY02008**

Estimated OVERSEAS visits to Massachusetts during **CY2008** was just under **1.3 million**. This was a 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.

**All travel to U.S. from MOTT target markets CYTD thru July 2009**

For CY 2009 through July 2009, visitation from Canada to U.S. dropped 9.0%, while western Europe visits declined 11.2% 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>	<b>Domestic</b>	<b>International</b>	<b>Total</b>
<b>By Industry</b>	(\$ 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
<b>2008 Totals</b>	<b>\$13,539.5</b>	<b>\$2,037.3</b>	<b>\$15,576.8</b>

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: September 2009 & CYTD Thru September 2009

The **MASSVACATION.COM** site had **70,376 unique visits** in **September 2009**, up 13.7% from 61,875 in September 2008. Additionally, there were **361,600 page views** in September, up 1.8% from the **355,077** in 2008. The average time on the site went down by 4.5% to **3 minutes 57 seconds**. The **Fall Foliage** page had the most views with **19,695**.

For CY2009 through September 2009, the total **visits** were **818,500 (down 5.2% from same time period in 2008)** and the **page views** were **4.7 million (down 3.8%)**. The average time on the site was **4 minutes 14 seconds (up 9.7%)**.

The **United States** generated the most website visits with **709,095 (down 7.4%)**. **Canada** followed with **36,144 (up 15.3%)** and the **United Kingdom** was third with **14,747 (up 3.2%)**.

The **Mass Value Pass** page had the most visits for CY2009 through September 2009 with **468,177**. The top three region pages were Cape Cod (86,448 views), Western Mass (69,667) and North of Boston (46,903)

Source: MOTT- (Google Analytics)

## GETAWAY GUIDE Distribution: September 2009

The total number of **2009 Getaway Guides** distributed in **September** was 30,600. Of these, **3,200 were individual requests from FARM** (the online fulfillment system). Most of the remaining guides were sent to major information centers across the state (19,350), hotels and motels (1,200), and parks and campgrounds (2,850).

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

## Lesbian Gay Bisexual Transgender (LGBT): September 2009

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

The Massachusetts' **LGBT micro site** was launched on January 23, 2009 and the site utilization has been very high. Since inception thru September 2009 there have been 45,000 visits and over 111,000 page views.

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

## MOTT Updates and Activities from Tony D'Agostino: October 2009

A big thanks to intern Duy Khanh Nguyen for helping prepare this edition of TravelStats.