



MOTT TravelStats Newsletter -September 2011

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: August 2011

- During the month of August 2011, Massachusetts statewide lodging room demand (1,986.0 k) increased 4.4% compared to August 2010 (1,903.0 k). The average daily room rate between these two periods increased by 3.8% to \$154.00 from \$148.36. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 3.5 percentage points to 80.3% from 76.8%. Overall room revenue increased by 8.3% to \$305.8 mil from \$282.3 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD August over same period last year by 8.6% to \$90.81 from \$83.65. Occupancy was up 4.9% and the room rate increased 3.5%.

Massachusetts Hotel Lodging Data

Month of August

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2011	1,986.0	154.00	80.3	305.8
2010	1,903.0	148.36	76.8	282.3
2009	1,770.4	142.79	71.6	252.8

REVPAR- Calendar Year 2011, thru August

Year	(\$'s)	% Change
2011	90.81	8.6
2010	83.65	11.2
2009	75.24	-16.5

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

State Room Occupancy Taxes: August 2011 & Fiscal Year 2012

- For the month of August 2011 (FY12), the net room occupancy tax collections of \$20.1 million increased by 8.8% from the August 2010 (FY11) collections of \$18.5 million. The August 2010 collections were a 7.9% increase from the August 2009 (FY10) collections of \$17.1 million.
- For FY2012YTD net room occupancy tax collections totalled \$38.6 million, a 11.0% increase from FY11. The FY11 collections of \$34.7 million were 10.7% more than the FY10 collections of \$31.4 million.

State Room Occupancy Tax Collections

Month of August

Year	\$ (000)	% Change
FY2012	20,083.3	8.8
FY2011	18,463.7	7.9
FY2010	17,113.4	-10.9

FYTD thru August

Year	\$ (000)	% Change
FY2012	38,569.5	11.0
FY2011	34,745.9	10.7
FY2010	31,378.5	-15.2

Source: Mass DOR Monthly Report of Collections and Refunds.

Local Option Room Occupancy Taxes: August 2011 & Fiscal Year 2012

- For the month of **August 2011 (FY12)**, the local option room occupancy tax collections of \$16.2 million increased 10.6% from the August 2010 (FY11) collections of \$14.7 million. The August 2010 collections were a 49.3% increase from the August 2009 (FY10) collections of \$9.8 million (note: new law allowed local option tax rate increases in communities).
- **For FY2012 YTD**, local option room occupancy tax collections totalled \$30.9 million, a 13.8% increase from FY11. (See note above). The FY09 collections of \$27.1 million were a 53.0% increase over the the FY09 collections of \$17.7 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of August

Year	\$ (000)	% Change
FY2012	16,228.5	10.6
FY2011	14,666.9	49.3
FY2010	9,822.9	-11.7

FYTD thru August

Year	\$ (000)	% Change
FY2012	30,874.1	13.8
FY2011	27,124.8	53.0
FY2010	17,721.9	-15.8

Ma Tourism Fund (MTF) Collections thru August: FYs 2012 and 2011

The August FYTD2012 MTF collections totaled \$9.3 million which was a 10.7% increase from the \$8.4 million collected during the same period in FY2011.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: August 2011 and CYTD 2011

Massachusetts' museum and attraction attendance increased 7.1% in the month of August 2011 compared to August 2010 (1,548,868 vs. 1,446,773 visitors). The total net visitor increase was 102,095 at the 59 institutions reporting visitor data.

For calendar year 2011 thru August attendance is up 4.9% to 8.7 million from the 8.3 million during the same period in CY2010, an increase of 408,117 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: August 2011

- In **August** 2011, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.31 million, an increase of 1.0% from the August 2010 total of 2.29 million. The CYTD2011 thru August total was 16.7 million, up 6.7% from the 15.7 million last year.

- The number of **international passenger** arrivals and departures increased in August 2011 by 9.9% compared to August 2010 to 450 k from 409 k. The CYTD thru August totals were up 6.9% to 2.7 million from 2.5 million last year.

Domestic Passenger Volume

August	(000)s	% Change
2011	2,309	1.0
2010	2,287	7.6
2009	2,126	1.5

International Passenger Volume

August	(000)s	% Change
2011	450	9.9
2010	409	1.8
2009	402	-6.5

Domestic Passenger Volume

CYTD August	(000)s	% Change
2011	16,706	6.7
2010	15,663	7.8
2009	14,527	-5.0

International Passenger Volume

CYTD August	(000)s	% Change
2011	2,695	6.9
2010	2,520	-1.3
2009	2,553	-9.8

Source: MASSPORT



Domestic Visitation to Massachusetts FY2011:

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

<u>Origin State</u>	<u>Person trips</u>	<u>Share of all trips</u>
Massachusetts	5,544,000	32.0%
New York	2,331,000	13.5%
Connecticut	1,625,000	9.4%
New Hampshire	953,500	5.5%
Rhode Island	713,500	4.1%
California	368,500	2.1%
Florida	534,000	3.1%
New Jersey	694,500	4.0%
Maine	694,000	4.0%
Virginia	232,500	1.3%
Pennsylvania	511,000	3.0%
Vermont	403,000	2.3%
All Other States	2,708,500	15.6%
All New England States	9,933,000	57.4%
All Mid Atlantic States	3,536,500	20.4%

Source:TNS, FY2010 & FY2011

The total domestic trips to Massachusetts in FY2011 were 17.3 million. The primary trip purpose in FY2011 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 & FY2011

International Visitors to MA & U.S. Calendar Year 2010 & August 2011

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u> MA share of Market in 2010	<u>Visitors to U.S.</u> CYTD 2011 thru August
	2010 Visitors (000s)	Change from 2009		
ALL OVERSEAS	1,292	2.6%	4.9%	6.4%
WESTERN EUROPE	614	-5.2%	5.4%	7.0%
Canada	662	2.6	3.3%	6.1%
United Kingdom	189	1.1%	4.9%	1.3%
Germany	121	10.0%	7.0%	5.9%
Japan	71	86.8%	2.1%	-5.3%
Ireland	21	-41.7%	5.8%	-3.5%
France	70	7.7%	5.2%	15.7%
Italy	41	-19.6%	4.9%	9.5%
Netherlands	35	-22.2%	6.2%	6.6%
Brazil	54	-5.3%	4.5%	27.2%
Spain	30	42.9%	4.7%	9.2%
Argentina	19	-5.0%	4.4%	17.0%

Travel to Massachusetts from MOTT target markets in CY2010

Estimated OVERSEAS visits to Massachusetts during **CY2010** was just under **1.3 million**. This was an increase of 2.6% from **CY2009**.

Historically, the top three origin countries to visit MA have been Canada, the UK and Germany.

Massachusetts market share of Overseas for CY2010 and Canadian visitation for CY2010

For CY2010, Massachusetts captured 4.9% of all Overseas travel to the U.S., down from a 5.3% market share in CY2009. Canadian visitation to MA totaled 662 k in CY2010 up 2.6% but share dropped to 3.3% from 3.6 in CY2009.

Travel to U.S. from MOTT target markets for CYTD 2011 thru August

Travel to U.S. for CYTD thru August from Canada, which is Massachusetts' number one international visitor origin market, was up 6.1%. Visits to U.S. from Western Europe were up 7.0% while all Overseas visitation was up 6.4%.



Direct Economic Impact of Travel and Tourism, CY2010

Domestic and International traveler expenditures totaled \$15.5 Billion in MA during 2010, 8.2% from 2009. Domestic traveler spending increased 8.5% while international traveler spending increased 6.3%. Total expenditures generated \$1 Billion in state and local taxes for MA.

Calendar Year 2010	(% of Total)		Expenditures			
	Domestic 2010p (\$ Millions)		International 2010p (\$ Millions)		Total 2010p (\$ Millions)	
Travel Expenditures						
Public Transportation	\$4,322.0	32%	\$253.7	12%	\$4,576.0	29%
Auto Transportation	1,952.6	14%	29.5	1%	1,982.2	13%
Lodging	2,728.3	20%	687.5	33%	3,416.0	22%
Foodservice	2,748.8	20%	395.1	19%	3,144.0	20%
Entertainment & Recreation	826.0	6%	171.0	8%	997.1	6%
General Retail Trade	897.2	7%	518.2	25%	1,415.5	9%
Total	\$13,475.0	100%	\$2,054.9	100%	\$15,530.9	100%

Impact of Domestic Travel on MA Counties, 2010

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
Barnstable	\$812.66	\$213.62	8.42	\$34.65	\$49.23
Berkshire	327.25	84.95	3.45	16.56	9.17
Bristol	384.36	82.24	2.94	20.78	7.60
Dukes	112.29	28.45	1.16	4.35	6.65
Essex	690.84	162.44	6.10	37.34	18.29
Franklin	50.73	9.69	0.36	2.91	1.69
Hampden	442.86	97.96	3.14	24.74	8.87
Hampshire	102.42	22.77	0.83	5.61	2.83
Middlesex	2,003.99	530.29	19.25	111.09	54.05
Nantucket	140.46	29.59	0.98	4.13	4.93
Norfolk	838.10	257.59	9.02	45.39	18.60
Plymouth	474.98	95.96	3.58	23.48	22.09
Suffolk	6,408.03	1,237.97	40.26	170.69	120.38
Worcester	686.02	139.08	5.24	37.16	15.50
Statewide	\$13,474.99	\$2,992.62	104.73	\$538.88	\$339.88

Source: USTA Economic Impact of Travel on MA Counties, 2010



MASSVACATION.COM Activity: September 2011 and First 6 months CY2011

The **MASSVACATION.COM** site had **118,562 visits** in September 2011 **up 7.4%** from the 110,443 in September 2010. Additionally, there were **356,849 page views**, **down 8.4%** from the 389,761 the prior September. The **average time on the site went down 14.9%** to **2 minutes 7 seconds**. The most visited page, **Fall Foliage**, had 65,911 views. **Visits originating in the U.S. increased by 8.3%** to **106,980**. Visits from Canada decreased 1.8% to 2,857 and Visits from the U.K. increased 3.2% to 2,014.

For the first six months of **CY2011** the total **visits** were **507,884 up 3.5%** from the **490,659 during the first six months of CY2010**. The **page views** were **down 9.7%** to 2.2 million from 2.4 million. The average time on the **site was 2 minutes 53 seconds** (down 21.8%). The **United States** generated the most website visits with **440,354** (up 4.6%). **Canada** followed with **21,538** (down 10.4%) and the **United Kingdom** was third with **8,176**(down 7.5%). The **Winterfun (168,916)** and **Find Lodging (74,172)** pages had the most views. The top region page was **Cape Cod** with **52,915k**.

Source: MOTT- (Google Analytics)

Lesbian Gay Bisexual Transgender (LGBT) data: September 2011 and First 6 months CY2011

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.

In September 2011, there were **5,600** visits and **10,652** page views. During the first six months of 2011 there were **44,986** visits and **106,197** page views.

The top five information pages viewed thru September were **westmass, bostonmass, capemass, centmass and northmass**.

(Source: CMI and MOTT)

MOTT Updates and Activities from Tony D'Agostino September 2011

Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities. Thanks to MOTT intern Christie Basile for helping pull this edition of TravelStats together.