



Office of Travel & Tourism

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MOTT TravelStats Newsletter - January 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: December 2008

- During the month of December 2008, Massachusetts state wide lodging room demand (1,012k) increased 1.5% compared to December 2007 (996k). The average daily room rate between these two periods decreased by 5.5% to \$113.56 from \$120.13. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 0.1 percentage points to 43.7% from 43.8%. Overall room revenue decreased 4.0% to \$114.9 mil from \$119.7 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CY2008 over 2007 by 0.5% to \$86.76 from \$87.20. Occupancy was down 2.1% and the room rate was up 1.7%.

Massachusetts Hotel Lodging Data

Month of December

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2008	1,012	113.56	43.7	\$114.9
2007	996	120.13	43.8	\$119.7
2006	954	113.19	42.4	\$107.9

REVPAR- Calendar Year 2008

Year	(\$'s)	% Change
2008	86.76	-0.5
2007	87.20	7.2
2006	81.30	10.1

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

Room Occupancy Taxes: December 2008 (Fiscal Year 2009)

- For the month of December 2008 (FY09), the net room occupancy tax collections of \$12.3 million decreased by 12.2% over the December 2007 (FY08) collections of \$14.0 million. The December 2007 collections were an 18.9% increase over the December 2006 (FY07) collections of \$11.8 million.
- For the Fiscal Year 2009 thru December 2008, net room occupancy tax collections totalled over \$104 million, a 2.2% decrease over the same period of FY08. The FY08 collections of \$106.5 million were 11.8% more than the FY07 collections of \$95.3 million.

Total Room Occupancy Tax Collections

Month of December

Year	\$ (000)	% Change
FY2009	12,331	-12.2
FY2008	14,039	18.9
FY2007	11,803	4.6

FYTD thru December

Year	\$ (000)	% Change
FY2009	104,092	-2.2
FY2008	106,451	11.8
FY2007	95,253	10.1

Source: Mass DOR Monthly Report of Collections and Refunds

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

The fiscal year 2009 to date thru December 2008 Massachusetts Tourism Fund collections were down 3.4% compared to the December 2007 (FY2008) collections (\$25.2 million v. \$26.1 million). The FYTD December 2007 collections were 8.6% higher than the December 2006 (FY2007) collections (\$26.1 million v. \$24.0 million).

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: December 2008 and CY 2008

Massachusetts' museum and attraction attendance decreased 10.1% in the month of December 2008 compared to December 2007 (571,430 visitors v. 635,443 visitors). The total net visitor decrease was 64,013 at the 57 institutions reporting visitor data. For all of calendar year 2008 attendance was up 1.7% to 12.2 million from the 12.0 million attendees in 2007.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: December 2008

- In **December 2008**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.60 million, a decrease of 3.3% from the December 2007 total of 1.66 million. For calendar year 2008 the volume was down 7.6% from the prior year.
- The number of **international passenger** arrivals and departures decreased in December 2008 by 12.2% from December 2007. The CY08 the volume was down 4.2% from prior year.

Domestic Passenger Volume

December	(000)s	% Change
2008	1,604	-3.3
2007	1,660	- 7.5
2006	1,795	4.8

International Passenger Volume

December	(000)s	% Change
2008	257	-12.2
2007	293	5.3
2006	281	-0.8

Domestic Passenger Volume

CY2008	(000)s	% Change
2008	22,032	-7.6
2007	23,837	1.2
2006	23,556	3.6

International Passenger Volume

CY2008	(000)s	% Change
2008	3,977	-4.2
2007	4,153	2.6
2006	4,050	-4.4

(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 November
	2007 Visitors (000s)	2007 SHARE of MARKET	
ALL OVERSEAS	1,171	4.9%	7.0%
WESTERN EUROPE	684	5.9%	13.5%
Canada	604	3.6%	7.9%
United Kingdom	243	5.4%	3.0%
Germany	85	5.6%	18.2%
Japan	64	1.8%	-7.6%
Ireland	48	9.7%	8.7%
France	47	4.7%	26.2%
Italy	41	6.7%	24.8%
Netherlands	28	5.6%	21.9%
Brazil	28	4.4%	20.0%
Spain	28	5.4%	30.6%
Argentina	18	6.7%	20.0%

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 November** still show significant increases in **total visitors to the U.S.** from **Overseas (up 7.0%)**, **Western Europe (up 13.5%)** and **Canada (up 7.9%)** 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 MA during 2007, up 6.6% from 2006. Domestic traveler spending increased 6% while international traveler spending increased 11.1%. Total expenditures generated \$943.5 million in state and local taxes for MA.

<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: January 2009 and Calendar Year 2008

The **MASSVACATION.COM** site had **57,452 unique visits** in **January 2009** (down slightly from 61,709 in January 2008). Additionally, there were **492,789** page views in January up substantially from the **338,820** in 2008. There were almost twice as many pages viewed per visit in January 2008 and the average time on the site was up 20% to **4 minutes 10 seconds**.

For **CY2008**, the total **unique visits** were 1,007,325 and the **page views** were 5,586,468. The **median length** of a visit was 3 minutes and 46 seconds. The **United States** generated the most website visits with 221,871. **Canada** followed with 35,791 visits and the **United Kingdom** was third with 17,476 visits.

The **Special Offers/lodging page** had the most visits on the website with 266,141. Of the pages that individually profiled regions **Cape Cod** (121,766 visits), **Greater Boston** (111,178 visits), **Western MA** (102,639) were the top three. The **Find Lodging** and **Tours Information** pages were both in the top ten visited with 110,455 and 108,183 visits respectively.

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Distribution: January 2009

The total number of **2008 Getaway Guides** distributed in **January** was **16,106**. Of these, **15,703** were **individual requests** from **FARM** (the online fulfillment system), and there were 158 individual requests for the **Student Guide Kit**. The remaining guides were sent to legislators, AAA travel offices and hotels/motels across the state.

In total during 2008, there were over **700,000** of the **2008 Getaway Guides** distributed and just over 100,000 were processed through the **FARM** system.

The **new 2009 Getaway Guides** were also available in January and **5,408** were processed through **FARM**

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

Lesbian Gay Bisexual Transgender (LGBT): January 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%)** by the LGBT community.

The **LGBT micro site** was launched on January 23 and the site utilization has been fantastic. For the one week the site was live in January there were 2,000 unique visits and 7,500 page views.

MOTT Updates and Activities from Tony D'Agostino: February 2009

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.

The Boston Globe Travel Show was held February 20-22, 2009 at the Seaport World Trade Center in Boston and was a huge success.

Many thanks to MOTT intern Lauren Fernandes for helping pull this edition of TravelStats together.