



Office of Travel & Tourism

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MOTT TravelStats Newsletter - November 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: October 2009

- During the month of October 2009, Massachusetts state wide lodging room demand (1,732k) increased 0.8% compared to October 2008 (1,718k). The average daily room rate between these two periods decreased by 8.2% to \$140.61 from \$153.20. Occupancy rates, which reflect changes in both supply and demand for rooms, was unchanged at 69.6%. Overall room revenue decreased 7.5% to \$243.5 mil from \$263.3 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CY2009 over same period in CY2008 by 15.4% to \$78.82 from \$93.22. Occupancy was down 7.3% and the room rate decreased by 8.8%.

Massachusetts Hotel Lodging Data

Month of October

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	1,732	140.61	69.6	243.5
2008	1,718	153.20	69.6	263.3
2007	1,825	159.37	74.9	290.9

REVPAR- Calendar Year 2009 thru October

Year	(\$'s)	% Change
2009	78.82	-15.4
2008	93.22	2.2
2007	91.25	6.8

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

Room Occupancy Taxes: October 2009 and (Fiscal Year 2010)

- For the month of October 2009 (FY09), the net room occupancy tax collections of \$15.7 million decreased by 9.6% from the October 2008 (FY09) collections of \$17.3 million. The October 2008 collections were a 0.3% decrease over the October 2007 (FY08) collections of \$17.8 million.
- For FY2010 to date thru October 2009, net room occupancy tax collections totalled \$64.0 million, a 13.6% decrease from the same period of FY09. The FY09 collections of \$74.1 million were 2.1% more than the FY08 collections of \$72.6 million.

Total Room Occupancy Tax Collections

Month of October

Year	\$ (000)	% Change
FY2010	15,659	-9.6
FY2009	17,316	-0.3
FY2008	17,795	14.0

FY2010 thru October

Year	\$ (000)	% Change
FY2010	64,031	-13.6
FY2009	74,123	2.1
FY2008	72,602	9.0

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: October 2009 and CYTD 2009

Massachusetts' museum and attraction attendance decreased 3.1% in the month of October 2009 compared to October 2008 (1,088,106 visitors v. 1,123,345 visitors). The total net visitor decrease was 35,239 at the 60 institutions reporting visitor data.

For calendar year 2009 thru October attendance was down 0.4% to 10,758,150 from the 10,800,382 attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: October 2009

- In **October 2009**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled almost 2 million, an increase of 7.0% from the October 2008 total of 1.9 million. Calendar year to date thru October the total was 18.3 million down 2.7%.
- The number of **international passenger** arrivals and departures increased in October 2009 by 1.1% compared to October 2008 to 317k from 314k. The calendar year to date thru October totals are down 8.0% to 3,193k from 3,472k.

Domestic Passenger Volume

October	(000)s	% Change
2009	1,996	7.0
2008	1,865	-11.1
2007	2,099	0.5

International Passenger Volume

October	(000)s	% Change
2009	317	1.1
2008	314	-11.7
2007	355	7.3

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	18,327	-2.7
2008	18,828	-7.2
2007	20,278	2.4

International Passenger Volume

CYTD	(000)s	% Change
2009	3,193	-8.0
2008	3,472	-2.6
2007	3,564	1.8

(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
Massachusetts	5,270,000	30.6%
New York	2,523,000	14.7%
Connecticut	1,740,000	10.1%
New Hampshire	886,000	5.1%
Rhode Island	804,000	4.7%
Maine	683,000	4.0%
New Jersey	640,000	3.7%
California	578,000	3.4%
Florida	550,000	3.2%
Pennsylvania	524,000	3.0%
Vermont	290,000	1.7%
Virginia	204,000	1.2%
All Other States	2,519,000	14.6%
All New England States	9,671,000	56.2%
All Mid Atlantic States	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 September
	2008 Visitors (000s)	2008 SHARE of U.S. MARKET	
ALL OVERSEAS	1,267	5.0%	-8.6%
WESTERN EUROPE	720	5.9%	-11.3%
Canada	635	3.4%	-7.3%
United Kingdom	237	5.2%	-15.7%
Germany	123	6.9%	-7.2%
Japan	62	1.9%	-13.5%
Ireland	52	9.7%	-22.2%
France	57	4.6%	-3.0%
Italy	58	7.5%	-6.7%
Netherlands	33	5.4%	-11.2%
Brazil	45	5.9%	11.4%
Spain	32	4.9%	-12.2%
Argentina	16	5.1%	8.7%

Travel to Massachusetts from MOTT target markets in CY2008

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

Travel to U.S. from MOTT target markets CYTD thru September 2009

For CY 2009 through September 2009, visitation from Canada to U.S. has dropped 7.3%, while visits from Western Europe have declined 11.3% 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>	Domestic	International	Total
By Industry	(\$ 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
2008 Totals	\$13,539.5	\$2,037.3	\$15,576.8

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: November 2009 & CYTD Thru November 2009

The **MASSVACATION.COM** site had **47,253 visits** in **November 2009**, up 49% from the 31,649 in November 2008. Additionally, there were **204,579 page views** in November, up 3.4% from the **161,311** in 2008. The average time on the site went down by 9.8% to **3 minutes 3 seconds**. The **MassValuePass** page had the most views with **26,285 (this Page did not exist in November 2008)**.

For CY2009 through November 2009, the total **visits** were **936,938 (down 2.8% from same time period in 2008)** and the **pageviews** were **5.2 million (down 2.8%)**. The average time on the site was **4 minutes 7 seconds (up 7.7%)**.

The **United States** generated the most website visits with **807,771 (down 5.0%)**. **Canada** followed with **39,923 (up 17.7%)** and the **United Kingdom** was third with **17,284 (up 2.6%)**. The **Mass Value Pass** page had the most visits for CY2009 through November 2009 with **523,048 pageviews**. The top three region pages were Cape Cod and the Islands (**93,630 views**), Greater Boston (**78,797**) and Western Mass (**71,748**)

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Distribution: November 2009

The total number of **2009 Getaway Guides** distributed in **November** was 5,515. Of these, **1,965 were individual requests from FARM** (the online fulfillment system). Most of the remaining guides were sent to major information centers across the state (400), hotels and motels (250), and parks and campgrounds (350).

Calendar year to date over 681,000 Getaway Guides have been distributed to interested consumers. Off this total, 78k requests have come thru **FARM**.

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

Lesbian Gay Bisexual Transgender (LGBT) data: November 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%) purposes** by the LGBT community.

The Massachusetts' **LGBT microsite** was launched on January 23, 2009 and the site utilization has been very high. Since inception thru November 2009 there have been 58,000 visits and over 133,000 page views.

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

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

Looking forward to seeing many of you at the 23rd Annual Governor's Conference on Travel and Tourism on Wednesday March 24th, 2010 at The Park Plaza Hotel in Boston. For more information please contact Dagny Ashley at MOTT.