



MOTT TravelStats Newsletter -November 2010

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 2010

- During the month of October 2010, Massachusetts statewide lodging room demand (1,815.9k) increased 6.0% compared to October 2009 (1,712.3k). The average daily room rate between these two periods increased by 5.6% to \$149.20 from \$141.24. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 4.4 percentage points to 73.7 from 69.3 percent. Overall room revenue increased 12.0% to \$270.9 mil from \$241.8 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD October over same period last year by 11.5% to \$88.37 from \$79.24. Occupancy was up 9.5% and the room rate increased 1.8%.

Massachusetts Hotel Lodging Data

Month of October

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2010	1,815.9	149.20	73.7	270.9
2009	1,712.3	141.24	69.3	241.8
2008	1,708.1	154.31	69.5	263.6

REVPAR- Calendar Year 2010, thru October

Year	(\$'s)	% Change
2010	88.37	11.5
2009	79.24	-15.3
2008	93.54	2.4

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

State Room Occupancy Taxes: October 2010 & Fiscal Year 2011

- For the month of October 2010 (FY11), the net room occupancy tax collections of \$16.8 million increased by 7.5% from the October 2009 (FY10) collections of \$15.7 million. The October 2009 collections were a 9.6% decrease from the October 2008 (FY09) collections of \$17.3 million.
- For FY2011 YTD net room occupancy tax collections totalled \$70.7 million, a 10.5% increase from FY10. The FY10 collections of \$64.0 million were 13.6 % less than the FY09 collections of \$74.1 million.

State Room Occupancy Tax Collections

Month of October

Year	\$ (000)	% Change
FY2011	16,833.2	7.5
FY2010	15,659.4	-9.6
FY2009	17,315.6	-2.6

FYTD Thru October

Year	\$ (000)	% Change
FY2011	70,745.7	10.5
FY2010	64,031.0	-13.6
FY2009	74,123.3	2.1

Source: Mass DOR Monthly Report of Collections and Refunds

Local Option Room Occupancy Taxes: October 2010 & Fiscal Year 2011

- For the month of October 2010 (FY11), the local option room occupancy tax collections of \$13.2 million increased significantly (note: new law allowed local option tax rate increases in communities) from the October 2009 (FY10) collections of \$8.7 million. The October 2009 collections were a 10% decrease from the October 2008 (FY09) collections of \$9.7 million.
- For FY2011 YTD, local option room occupancy tax collections totalled \$55.7 million, a 52.8% increase from FY10. (See note above) The FY10 collections of \$36.4 million were 14.0 % less than the FY09 collections of \$42.3 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of October

Year	\$ (000)	% Change
FY2011	13,162.4	51.0
FY2010	8,719.6	-10.0
FY2009	9,686.1	-2.7

FYTD thru October

Year	\$ (000)	% Change
FY2011	55,568.2	52.8
FY2010	36,367.5	-14.0
FY2009	42,280.1	2.0

Ma Tourism Fund (MTF) Collections, month of October: FYs 2011, 2010, and 2009

The October 2010(FY2011) MTF collections totaled \$17.2 million which was an 8.7% increase from the \$15.8 million collected during the same period in FY2010. The FY2010 collections were 13.8% less than the FY2009 collections of \$18.3 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: October 2010 and CYTD 2010

Massachusetts' museum and attraction attendance increased 6.1% in the month of October 2010 compared to October 2009 (1,126,527 visitors v. 1,061,871 visitors). The total net visitor increase was 64,656 at the 60 institutions reporting visitor data.

For calendar year 2010 thru October attendance is up 0.6% to 10,925,911 from the 10,863,971 during the same period in CY2009, an increase of 61,940 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: October 2010 and CYTD 2010

- In **October 2010**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled just over 2.2 million, an increase of 11.6% from the October 2009 total of just under 2.0 million. The CYTD2010 thru October total was 19.9 million, up 8.4% from the 18.3 million last year.

- The number of **international passenger** arrivals and departures increased in October 2010 by 7.1% compared to October 2009 to 339k from 317k. The CYTD thru October totals were up 0.5% to 3.208 million from 3.193 million last year.

Domestic Passenger Volume

October	(000)s	% Change
2010	2,228	11.6
2009	1,996	7.0
2008	1,865	-11.1

International Passenger Volume

October	(000)s	% Change
2010	339	7.1
2009	317	1.1
2008	314	-11.7

Domestic Passenger Volume

CYTD October	(000)s	% Change
2010	19,867	8.4
2009	18,327	-2.7
2008	18,828	-7.2

International Passenger Volume

CYTD October	(000)s	% Change
2010	3,208	0.5
2009	3,193	-8.0
2008	3,472	-2.6

Source: MASSPORT



Domestic Visitation to Massachusetts FY2010:

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

<u>Origin State</u>	<u>Person trips</u>	<u>Share of all trips</u>
Massachusetts	4,942,000	29.7%
New York	2,381,000	14.3%
Connecticut	1,557,000	9.3%
New Hampshire	820,500	4.9%
Rhode Island	700,000	4.2%
California	526,000	3.2%
Florida	578,000	3.5%
New Jersey	771,000	4.6%
Maine	688,000	4.1%
Virginia	197,000	1.2%
Pennsylvania	564,500	3.4%
Vermont	448,500	2.7%
Sub Total	14,173,500	85.1%
All Other States	2,481,500	14.9%
All New England States	9,157,000	55.0%
All Mid Atlantic States	3,217,000	22.3%

Source:TNS, Travels America, FY2010

The total domestic trips to Massachusetts in FY2010 were 16.1 million. The primary trip purpose in FY2010 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

International Visitors to MA in CY2009 and to U.S. in CY2009 and CY2010

	Visitors to Massachusetts		CY2009 change in Visitors to U.S.	CY2010 thru October change in Visitors to U.S.
	2009 Visitors	2009 SHARE of U.S. MARKET		
	(000s)			
ALL OVERSEAS	1,259	5.3%	-6.3%	11.6%
WESTERN EUROPE	648	5.9%	-10.0%	4.6%
Canada	635	3.4%	-5.0%	11.4%
United Kingdom	187	4.8%	-14.6%	-0.5%
Germany	110	6.5%	-5.4%	3.1%
Japan	38	1.3%	-10.2%	17.5%
Ireland	36	8.7%	-22.6%	-11.4%
France	65	5.4%	-3.2%	10.6%
Italy	51	6.8%	-3.4%	11.3%
Netherlands	45	8.3%	-9.9%	3.9%
Brazil	57	6.4%	16%	35.8%
Spain	21	3.5%	-9.4%	7.1%
Argentina	20	5.5%	12%	23.0%

Travel to Massachusetts from MOTT target markets in CY2009

Estimated OVERSEAS visits to Massachusetts during **CY2009** was just under **1.259 million**. This was a slight decrease from the **CY2008** estimate of **1.267 million**.

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

Massachusetts market share of Overseas and Canadian visitation for CY2009

For CY2009, Massachusetts captured 5.3% of all Overseas travel to the U.S., up from a 5.0% marketshare in CY2008. Market share of visitation from Canada to MA was 3.4% in CY2009, unchanged from 2008.

Travel to U.S. from MOTT target markets thru October 2010

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 11.3 thru October, visits from western Europe were up 4.6% while all Overseas visitation was up 11.6%.

Source: Dept of Commerce, OTTI



Direct Economic Impact of Travel and Tourism, CY2009

Domestic and International traveler expenditures totaled \$14.4 billion in MA during 2009, down 7.8% from 2008. Domestic traveler spending decreased 8.3% while international traveler spending decreased 5.1%. Total expenditures generated \$962.7 million in state and local taxes for MA.

<i>2009 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$3,893.3	\$237.8	\$4131.1
Auto Transportation	1,811.9	26.6	1,838.4
Lodging	2,467.5	628.0	3,095.5
Foodservice	2,601.6	379.3	2,980.9
Entertainment & Recreation	791.2	164.0	955.2
General Retail Trade	853.7	497.8	1,351.5
2009 Totals	\$12,419.2	\$1,933.5	\$14,352.6

Impact of Domestic Travel on MA Counties, 2009

<u>County</u>	Expenditures	Payroll	Employment	State Tax	Local Tax
	(\$ Millions)	(\$ Millions)	(Thousands)	Receipts (\$ Millions)	Receipts (\$ Millions)
Barnstable	\$785.18	\$212.46	8.53	\$33.20	\$45.51
Berkshire	308.96	84.87	3.49	15.50	8.28
Bristol	361.50	79.45	2.92	19.37	6.84
Dukes	104.81	27.78	1.14	4.02	5.94
Essex	634.88	156.99	6.00	34.03	16.08
Franklin	47.26	9.53	0.35	2.69	1.50
Hampden	419.55	92.93	3.17	23.24	8.04
Hampshire	96.16	22.49	0.83	5.22	2.55
Middlesex	1,856.80	520.51	19.21	102.06	47.91
Nantucket	136.85	29.52	0.99	3.99	4.60
Norfolk	791.57	256.65	9.06	42.51	16.81
Plymouth	446.49	95.55	3.61	21.89	19.86
Suffolk	5,781.23	1,206.95	39.83	152.68	103.91
Worcester	647.93	133.81	5.22	34.80	14.01
Statewide	\$12,419.16	\$2,929.50	104.35	\$495.20	\$301.84

Source: USTA Economic Impact of Travel on MA Counties, 2009



MASSVACATION.COM Activity: November 2010 & Q1, Q2, Q3 of CY2010

The MASSVACATION.COM site had **35,909 visits** in November 2010, down 24% from the 47,253 in November 2009. Additionally, there were **149,203 page views** in November, down 27% from the **204,579** the prior November. The average time on the site went up 20% to **3 minutes 40 seconds** from the 3 minutes 3 seconds. The most visited page, **Find Lodging**, had 13,456 views down nearly 11% from November, 2009. **Visits** originating in the U.S. decreased by 25% to 29,232. Visits from Canada decreased 13% to 1,225 and Visits from the U.K. decreased 20% to 833.

For **CY2010 Q1, Q2 and Q3** combined, the total **visits** were **807,683** (down 1.3% from CY09 Q1, Q2 and Q3) and the **pageviews** were **3.9 million** (down 16.9%). The average time on the **site** was **3 minutes 35 seconds** (down 15.3%). The **United States** generated the most website visits with **698,290** (down 13.7%). **Canada** followed with **38,642** (up 6.9%) and the **United Kingdom** was third with **14,234** (down 3.5%). The **Find Lodging** page had the most views in the first 9 months of 2010 with **376,611 pageviews**. The top region page was **Cape Cod and the Islands** with **91,361** views (up 5.7%).

Source: MOTT- (Google Analytics)

Lesbian Gay Bisexual Transgender (LGBT) data: November 2010 & CYTD thru November

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 February 23, 2009 and the site utilization has been very high. Since inception thru December 2009 there were 65,347 visits and 145,661 pageviews.

In November 2010 there were 6,099 visits and 19,015 page views. Calendar Year to date thru November there have been 73,365 visits and 166,647 page views.

The top five information pages viewed were blog, contest, iphone xdirectory, capemass, bostonmass, westmass, and contest.

(Source: CMI and MOTT)



MOTT Updates and Activities from Tony D'Agostino: December 2010

Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities.