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MOTT TravelStats Newsletter – October 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: September 2009

- During the month of **September 2009,** Massachusetts state wide lodging room demand (1,620k) decreased 1.6% compared to September 2008 (1,647k). The average daily room rate between these two periods decreased by 12.7% to $133.76 from $153.15. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 1.5 percentage points to 67.5% from 69.0%. Overall room revenue decreased 14.1% to $216.7 mil from $252.2 mil.

- REVPAR, which is a function of occupancy rate and room rate, decreased for CY2009 over same period in CY2008 by 16.4% to $76.50 from $91.56. Occupancy was down 8.2% and the room rate decreased by 8.9%.

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

Massachusetts Hotel Lodging Data

Month of September

Year	DEMAND (000's)	RATE ($'s)	Occupancy Rate %	REVENUE (millions)
2009	1,620	133.76	67.5	216.7
2008	1,647	153.15	69.0	252.2
2007	1,729	148.33	73.4	256.5

REVPAR- Calendar Year 2009 thru September

Year	($'s)	% Change
2009	76.50	-16.4
2008	91.56	4.2
2007	87.64	5.5

Room Occupancy Taxes: September 2009_and_(Fiscal Year 2010)

- For the month of **September 2009 (FY09),** the net room occupancy tax collections of $17.0 million decreased by 14.1% from the September 2008 (FY09) collections of $19.8 million. The September 2008 collections were a 4.0% increase over the September 2007 (FY08) collections of $19.0 million.

- For the September 2009 (Fiscal Year 2010), net room occupancy tax collections totalled $48.4 million, a 14.8% decrease from the same period of FY09. The FY09 collections of $56.8 million were 3.7% more than the FY08 collections of $54.8 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Total Room Occupancy Tax Collections

Month of September

Year	$ (000)	% Change
FY2010	16,993	-14.1
FY2009	19,792	4.0
FY2008	19,030	11.9

September (FY2010)

Year	$ (000)	% Change
FY2010	48,372	-14.8
FY2009	56,808	3.7
FY2008	54,806	7.5

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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: September 2009 and CYTD 2009_

Massachusetts' museum and attraction attendance increased 5.5% in the month of September 2009 compared to September 2008 (935,625 visitors v. 887,107 visitors). The total net visitor increase was 48,518 at the 60 institutions reporting visitor data.

For calendar year 2009 thru September attendance was down 0.1% to 9,670,044 million from the 9,677,037 million attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: September 2009 _

- In **September** 2009, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.8 million, an increase of 8.1% from the September 2008 total of 1.7 million. Calendar year to date thru September the total was 16.3 million down 3.7%.

- The number of **international passenger** arrivals and departures decreased in September 2009 by 2.0% compared to September 2008 to 323k from 330k. The calendar year to date thru September totals are down 8.9% to 2,876k from 3,159k.

Domestic Passenger Volume

September	(000)s	% Change
2009	1,804	8.1
2008	1,669	-10.0
2007	1,854	1.5

International Passenger Volume

September	(000)s	% Change
2009	323	-2.0
2008	330	-9.7
2007	366	6.0

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	16,331	-3.7
2008	16,963	-6.7
2007	18,179	2.6

International Passenger Volume

CYTD	(000)s	% Change
2009	2,876	-8.9
2008	3,159	-1.6
2007	3,209	1.2

(Source: Massport)

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Domestic Visitation to Massachusetts CY2008:

Domestic Visitors' Origin: Top states and regions, CY2008

Origin	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	5,270,000	30.6%
NewYork	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%
NewJersey	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.

Source:TNS, Travels America, CY2008

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International Visitors to Massachusetts in CY2008 and to U.S. in CY2009

	Visitors to Massachusetts		Visitors to U.S. change in CY09 thru August
	2008 Visitors (000s)	2008 SHARE of U.S. MARKET	
ALL OVERSEAS	1,267	5.0%	-6.3%
WESTERN EUROPE	720	5.9%	-11.2%
Canada	635	3.4%	-5.7%
United Kingdom	237	5.2%	-16.4%
Germany	123	6.9%	-6.2%
Japan	62	1.9%	-16.2%
Ireland	52	9.7%	-20.0%
France	57	4.6%	-2.6%
Italy	58	7.5%	-7.1%
Netherlands	33	5.4%	-11.0%
Brazil	45	5.9%	11.3%
Spain	32	4.9%	-11.8%
Argentina	16	5.1%	9.4%

Travel to Massachusetts from MOTT target markets in CY02008

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.

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

For CY 2009 through July 2009, visitation from Canada to U.S. has dropped 8.3%, while visits from Western Europe 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**.

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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.

2008 Expenditures in MA By Industry	Domestic ($ Millions)	International ($ Millions)	Total ($ 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: October 2009 & CYTD Thru October 2009

The **MASSVACATION.COM** site had **71,185 visits** in **October 2009**, up 3.3% from the 68,923 in October 2008**.** Additionally, there were **324,900 page views** in October, down 3.4% from the **336,300** in 2008. The average time on the site went down by 2.4% to **3 minutes 29 seconds**. The **Fall Foliage** page had the most views with **40,879 (down 14.4% from October 2008)**.

For CY2009 through October 2009, the total **visits** were **889,700 (down 4.6% from same time period in 2008)** and the **pageviews** were **5.0 million (down 3.8%)**. The average time on the **site was 4 minutes 11 seconds (up 8.7%).**
The **United States** generated the most website visits with **768,800 (down 7.0%)**. **Canada** followed with **38,515 (up 17.0%)** and the **United Kingdom** was third with **16,242 (up 1.5%)**. The **Mass Value Pass** page had the most visits for CY2009 through October 2009 with **496,763**. The top three region pages were Cape Cod and the Islands (**90,526 views**), greater Boston (**75,147)** and Western Mass (**68,741**)

Source: MOTT- (Google Analytics)

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GETAWAY GUIDE Distribution: October 2009

The total number of **2009 Getaway Guides** distributed in **October** was 22,693. Of these, **2,265 were individual requests** fr**om FARM** (the online fulfillment system). Most of the remaining guides were sent to major information centers across the state (13,400), hotels and motels (1,200), and parks and campgrounds (2,850).

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

Lesbian Gay Bisexual Transgender (LGBT) data: October 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 October 2009 there have been 50,000 visits and over 120,000 page views.

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

MOTT Updates and Activities from Tony D'Agostino: November 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 Dagney Ashley at MOTT.

Seaons Greetings to all.
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