



MOTT TravelStats Newsletter -October 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: September 2011

- During the month of September 2011, Massachusetts statewide lodging room demand (1,824.9 k) increased 7.0% compared to September 2010 (1,704.8 k). The average daily room rate between these two periods increased by 3.6% to \$148.54 from \$143.33. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 5.1 percentage points to 76.4% from 71.3%. Overall room revenue increased by 10.9% to \$271.1 mil from \$244.4 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD September over same period last year by 8.9% to \$93.38 from \$85.74. Occupancy was up 5.2% and the room rate increased 3.6%.

Massachusetts Hotel Lodging Data

Month of September

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2011	1,824.9	148.54	76.4	271.1
2010	1,704.8	143.33	71.3	244.4
2009	1,613.3	135.31	67.4	218.3

REVPAR- Calendar Year 2011, thru September

Year	(\$'s)	% Change
2011	93.38	8.9
2010	85.74	11.3
2009	77.04	-16.2

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

State Room Occupancy Taxes: September 2011 & Fiscal Year 2012

- For the month of September 2011 (FY12), the net room occupancy tax collections of \$20.6 million increased by 7.5% from the September 2010 (FY11) collections of \$19.2 million. The September 2010 collections were a 12.8% increase from the September 2009 (FY10) collections of \$17.0 million.
- For FY2012 YTD net room occupancy tax collections totalled \$59.2 million, a 9.8% increase from FY11. The FY11 collections of \$53.9 million were 11.5% more than the FY10 collections of \$48.4 million.

State Room Occupancy Tax Collections

Month of September

Year	\$ (000)	% Change
FY2012	20,611.9	7.5
FY2011	19,166.5	12.8
FY2010	16,993.2	-14.1

FYTD thru September

Year	\$ (000)	% Change
FY2012	59,181.4	9.8
FY2011	53,912.5	11.5
FY2010	48,371.6	-14.9

Source: Mass DOR Monthly Report of Collections and Refunds.

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

- **For the month of September 2011 (FY12)**, the local option room occupancy tax collections of \$16.7 million increased by 9.3% from the September 2010 (FY11) collections of \$15.3 million. The September 2010 collections were a 53.9% increase from the September 2009 (FY10) collections of \$9.9 million (note: new law allowed local option tax rate increases in communities).
- **For FY2012 YTD**, local option room occupancy tax collections totalled \$47.6 million, a 12.2% increase from FY11. (See note above). The FY10 collections of \$42.4 million were a 53.4% increase over the the FY10 collections of \$27.6 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of September

Year	\$ (000)	% Change
FY2012	16,669.3	9.3
FY2011	15,280.9	53.9
FY2010	9,926.0	-14.0

FYTD thru September

Year	\$ (000)	% Change
FY2011	47,573.4	12.2
FY2010	42,405.8	53.4
FY2009	27,647.9	-15.2

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

The September FYTD2012 MTF collections totaled \$14.6 million which was a 9.9% increase from the \$13.2 million collected during the same period in FY2011.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: September 2011 and CYTD 2011

Massachusetts' museum and attraction attendance increased 4.4% in the month of September 2011 compared to September 2010 (984,617 vs. 943,246 visitors). The total net visitor increase was 41,371 at the 60 institutions reporting visitor data.

For calendar year 2011 thru September attendance is up 4.8% to 9.8 million from the 9.3 million during the same period in CY2010, an increase of 445,521 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: September 2011

- In **September** 2011, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.1 million, an increase of 3.9% from the September 2010 total of 2.0 million. The CYTD2011 thru September total was 18.8 million, up 6.3% from the 17.6 million last year.

- The number of **international passenger** arrivals and departures increased in September 2011 by 11.4% compared to September 2010 to 388 k from 348 k. The CYTD thru September totals were up 7.5% to 3.1 million from 2.9 million last year.

Domestic Passenger Volume

September	(000)s	% Change
2011	2,053	3.9
2010	1,977	9.6
2009	1,804	8.1

International Passenger Volume

September	(000)s	% Change
2011	388	11.4
2010	348	7.7
2009	323	-2.0

Domestic Passenger Volume

CYTD September	(000)s	% Change
2011	18,758	6.3
2010	17,639	8.0
2009	16,331	-3.7

International Passenger Volume

CYTD September	(000)s	% Change
2011	3,083	7.5
2010	2,869	-0.3
2009	2,876	-8.9

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. CY 2010 & September 2011

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u> MA share of Market in 2010	<u>Visitors to U.S.</u> CYTD 2011 thru September
	2010 Visitors (000s)	Change from 2009		
ALL OVERSEAS	1,292	2.6%	4.9%	6.3%
WESTERN EUROPE	614	-5.2%	5.4%	6.7%
Canada	662	2.6	3.3%	6.2%
United Kingdom	189	1.1%	4.9%	0.8%
Germany	121	10.0%	7.0%	6.4%
Japan	71	86.8%	2.1%	-5.1%
Ireland	21	-41.7%	5.8%	-2.7%
France	70	7.7%	5.2%	14.8%
Italy	41	-19.6%	4.9%	9.5%
Netherlands	35	-22.2%	6.2%	6.4%
Brazil	54	-5.3%	4.5%	27.9%
Spain	30	42.9%	4.7%	10.4%
Argentina	19	-5.0%	4.4%	17.7%

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 September

Travel to U.S. for CYTD thru September from Canada, which is Massachusetts number one international visitor origin market, was up 6.2%. Visits to U.S. from Western Europe were up 6.7% while all Overseas visitation was up 6.3%.



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: October 2011 and First 6 months CY2011

The **MASSVACATION.COM** site had **168,110 visits** in October 2011 **up 121.9%** from the 75,768 in October 2010. Additionally, there were **409,098 page views, up 44.6%** from the 282,830 the prior October. The **average time on the site went down 48.1%** to **1 minutes 36 seconds**. The most visited page, **Fall Foliage**, had 130,005 views. **Visits originating** in the **U.S. increased by 133%** to **156,021**. Visits from Canada increased 27.5% to 2,494 and Visits from the U.K. increased 32.9% to 1,870.

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) site data: October 2011 and 6 months CY11

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 October 2011, there were **5,477** visits and **11,837** page views to the **LGBTMassvacation** site. During the first six months of 2011 there were **44,986** visits and **106,197** page views.

The top five information pages viewed in October were **westmass, bostonmass, wedding, centmass and southmass**.

(Source: CMI and MOTT)

MOTT Updates and Activities from Tony D'Agostino Novemebr 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.