REPORT DATA

Data in this report are the most current available at the time of publication. Data are based on all travel – domestic and international, leisure and business, unless otherwise specified. Data are reported on a calendar-year basis, unless otherwise specified. A visitor is defined as someone who travels at least 50 miles one way or stays overnight.

TRAVELSTATS

The Massachusetts Office of Travel & Tourism (MOTT) publishes a free monthly research e-newsletter, TravelStats, which comprises lodging, attractions, and airport data; lodging tax collections; Massachusetts Tourism Fund receipts; and site and circulation data for massvacation.com. To subscribe, contact tony.dagostino@state.ma.us. Current and past issues are posted at www.massvacation.com/research.
ECONOMIC IMPACT

- Direct spending by domestic and international visitors totaled $15.5 billion in 2010 (p. 4).

- Visitor expenditures supported 121,700 jobs in 2010 and $3.5 billion in wages and salaries (p. 4).

- Visitor expenditures generated just over $1 Billion in Massachusetts state and local tax revenue in 2010 (p. 4).

- Each dollar spent by a visitor in 2010 generated 4.0 cents in state tax receipts and 2.5 cents in local taxes (p. 4).

- State hotel room occupancy tax collections totaled $167.3 million and local option room occupancy tax collections totaled $131.3 million in FY2011 (p. 6).

VISITOR ORIGIN

- In FY2011, Massachusetts hosted 17.3 million domestic visitors.

- In CY2010, there were 2.0 million international visitors; 1.3 million came from overseas and 662,000 from Canada (p. 10).

- Domestic visitors accounted for approximately 90% of all visitors; international visitors, 10% (p. 10).

DOMESTIC & INTERNATIONAL VISITORS

- In FY2011, 57.4% percent of all person trips originated in New England and 20.4% from the mid-Atlantic states (NY, NJ, and PA) (p. 12).

- Visiting friends and relatives is the most frequently reported primary trip purpose (45.8%) (p. 13).

- Travel by personal car is the dominant mode of transportation (68.3%) (p. 13).

- 45.1% of the domestic visitors who spent at least one night in Massachusetts reported staying in a hotel, motel, or bed and breakfast (p. 13).

- Seasonality of domestic visitors: 16% of domestic visitors come in the first quarter of the calendar year (Q1), 25% during (Q2), 37% during (Q3) and 22% during (Q4).

- Canada, the United Kingdom, and Germany are the top three countries of origin and accounted for 50% of all international visitors to MA in CY2010 (p. 26).
CONTENTS

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

Economic Impact 4–5
Room Occupancy Taxes 6
Spending by Industry Sector 7–9
Visitor Volume 10
Domestic Visitor Economic Impact By County 11
Domestic Visitor Origin 12
Domestic Visitor Behavior 13

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

MOTT Mission 14
Domestic Marketing Programs & Results 14–15
LGBT Marketing Program & Group Tour 20
massvacation.com 21–22
Governors Conference 23
FARM Fulfillment & Relationship Marketing 23
Public Relations 23–24

MOTT International Overview 25–26
MOTT Regional Grant Program 27
Direct expenditures by domestic and international visitors to Massachusetts totaled $15.5 billion in 2010, an 8.2% increase from 2009 and a 9.3% increase over 2006.

Massachusetts’ 2010 direct expenditures represented a 2.0% share of all U.S. direct expenditures ($758.7 billion).

Domestic visitors spent $13.5 billion in 2010, 86.8% of all spending; international visitors, $2.1 billion, 13.2%.

An analysis of spending by industry sectors shows major differences between domestic and international visitors’ spending behavior.

In 2010, domestic spending increased 8.5%; international increased 6.3%.

Visitor spending supported 121,700 full-time, part-time, and seasonal jobs, an increase of 0.2% from 2009, and payroll of $3.5 billion, a 2.0% increase.

The state received $622.7 million in revenues through the state sales tax, excise taxes, and taxes on travel-related personal and corporate income, a 8.5% increase from 2009. Local community revenue totaled $383.6 million in sales and property tax revenue, a 12.3% increase.

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment</th>
<th>State Tax Receipts ($ Millions)</th>
<th>Local Tax Receipts ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>15,529.9</td>
<td>3,475.7</td>
<td>121,700</td>
<td>622.7</td>
<td>383.6</td>
</tr>
<tr>
<td>2009</td>
<td>14,352.6</td>
<td>3,407.5</td>
<td>121,500</td>
<td>573.8</td>
<td>341.5</td>
</tr>
<tr>
<td>2008</td>
<td>15,576.8</td>
<td>3,650.1</td>
<td>128,800</td>
<td>598.1</td>
<td>364.6</td>
</tr>
<tr>
<td>2007</td>
<td>15,144.6</td>
<td>3,582.8</td>
<td>127,800</td>
<td>588.0</td>
<td>355.4</td>
</tr>
<tr>
<td>2006</td>
<td>14,211.3</td>
<td>3,381.6</td>
<td>125,800</td>
<td>554.2</td>
<td>333.0</td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010

<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>2010 Expenditures</th>
<th>Domestic ($ Millions)</th>
<th>International ($ Millions)</th>
<th>Total ($ Millions)</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Transportation</td>
<td>4,322.0</td>
<td>253.7</td>
<td>4,575.7</td>
<td>29.5</td>
<td></td>
</tr>
<tr>
<td>Auto Transportation</td>
<td>1,952.6</td>
<td>29.5</td>
<td>1,982.0</td>
<td>12.8</td>
<td></td>
</tr>
<tr>
<td>Lodging</td>
<td>2,728.3</td>
<td>687.5</td>
<td>3,415.8</td>
<td>22.0</td>
<td></td>
</tr>
<tr>
<td>Foodservice</td>
<td>2,748.8</td>
<td>395.1</td>
<td>3,143.8</td>
<td>20.2</td>
<td></td>
</tr>
<tr>
<td>Entertainment &amp; Recreation</td>
<td>826.0</td>
<td>171.0</td>
<td>997.0</td>
<td>6.4</td>
<td></td>
</tr>
<tr>
<td>General Retail Trade</td>
<td>897.2</td>
<td>518.2</td>
<td>1,415.4</td>
<td>9.1</td>
<td></td>
</tr>
<tr>
<td>2010 Totals</td>
<td>$13,475.0</td>
<td>$2,054.9</td>
<td>$15,529.9</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Percentage of total</td>
<td>86.8%</td>
<td>13.2%</td>
<td>100.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009 Totals</td>
<td>$12,419.2</td>
<td>$1,933.5</td>
<td>$14,352.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of total</td>
<td>86.5%</td>
<td>13.5%</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010
THE MULTIPLIER IMPACT

Visitors’ direct expenditures have a multiplier impact on the Massachusetts economy through indirect and induced spending. Indirect spending results from Massachusetts’ travel-related businesses purchasing goods and services within Massachusetts. Induced spending results from employees of travel-related businesses spending part of their income in MA. This multiplier impact is measured for expenditures, earnings, and employment. In 2010, the total impact of all travel spending was $24.7 billion, a 7.9% increase from 2009.

### Multiplier Impact of Direct Spending, 2010

<table>
<thead>
<tr>
<th>Impact Measure</th>
<th>Direct Impact</th>
<th>Indirect &amp; Induced Impact</th>
<th>Total Impact</th>
<th>% change over 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Impact (millions)</td>
<td>$15,529.9</td>
<td>$9,215.2</td>
<td>$24,745.1</td>
<td>7.9%</td>
</tr>
<tr>
<td>Earnings (millions)</td>
<td>$3,475.7</td>
<td>$3,155.0</td>
<td>$6,630.8</td>
<td>2.3%</td>
</tr>
<tr>
<td>Employment (thousands)</td>
<td>121.7</td>
<td>76.0</td>
<td>197.7</td>
<td>-0.7%</td>
</tr>
</tbody>
</table>

Indirect impact — travel industry operators purchasing goods and services in MA
Induced impact — employees of businesses and suppliers spending part of their earnings in MA

Source: TIA, The Economic Impact of Travel on MA Counties, 2010
In FY2011, state room occupancy tax collections (including convention centers) totaled $167.3 million, a 9.9% increase from FY2010 and a 6.2% increase over FY2007. Local room occupancy tax collections totaled $131.3 million, a 28.2% increase over FY2010 and a 48.7% increase over FY2007.

In FY2010, Suffolk, Middlesex, and Barnstable counties were the top three room occupancy tax-producing counties, accounting for 72.6% of state and 75.3% of local option room occupancy tax collections. On 10/1/2009 the local option rooms tax rate was increased from a maximum of 4% to 6%.

Room occupancy tax collections are driven by the overall performance of the lodging sector. In CY2011, Massachusetts’ lodging industry grew substantially, according to Smith Travel Research. In CY2011, Massachusetts’ room occupancy was up 5.5% and room revenue grew 8.7%.

### Room Occupancy Tax Collections, FY2007 – 2011

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State $ Millions</th>
<th>% Change</th>
<th>Local Option $ Millions</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>167.3</td>
<td>9.9%</td>
<td>131.3</td>
<td>28.2%</td>
</tr>
<tr>
<td>2010</td>
<td>152.2</td>
<td>-5.4%</td>
<td>102.4</td>
<td>14.0%</td>
</tr>
<tr>
<td>2009</td>
<td>160.9</td>
<td>-7.6%</td>
<td>89.8</td>
<td>-7.3%</td>
</tr>
<tr>
<td>2008</td>
<td>174.2</td>
<td>10.6%</td>
<td>96.9</td>
<td>9.6%</td>
</tr>
<tr>
<td>2007</td>
<td>157.5</td>
<td>8.8%</td>
<td>88.3</td>
<td>8.2%</td>
</tr>
</tbody>
</table>

Source: MA DOR (state totals include convention center collections)

### CY2011 vs. CY2010

<table>
<thead>
<tr>
<th></th>
<th>Occupancy</th>
<th>Room Rate</th>
<th>Demand</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>4.4</td>
<td>3.7</td>
<td>5.0</td>
<td>8.8</td>
</tr>
<tr>
<td>MA</td>
<td>5.5</td>
<td>3.3</td>
<td>5.2</td>
<td>8.7</td>
</tr>
<tr>
<td>NJ</td>
<td>5.0</td>
<td>1.7</td>
<td>5.1</td>
<td>6.9</td>
</tr>
<tr>
<td>NY</td>
<td>2.3</td>
<td>5.0</td>
<td>5.4</td>
<td>10.7</td>
</tr>
<tr>
<td>PA</td>
<td>4.2</td>
<td>4.5</td>
<td>5.7</td>
<td>10.5</td>
</tr>
</tbody>
</table>

Source: MA DOR (state totals include convention center collections)

### Room Occupancy Tax Collections by County, FY2010

<table>
<thead>
<tr>
<th>County</th>
<th>State Collections ($000)</th>
<th>Share %</th>
<th>Local Option Collections ($000)</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barnstable</td>
<td>$9,763</td>
<td>9.6%</td>
<td>$8,173</td>
<td>8.0%</td>
</tr>
<tr>
<td>Berkshire</td>
<td>$3,142</td>
<td>3.1%</td>
<td>$2,602</td>
<td>2.5%</td>
</tr>
<tr>
<td>Bristol</td>
<td>$1,912</td>
<td>1.9%</td>
<td>$1,728</td>
<td>1.7%</td>
</tr>
<tr>
<td>Dukes</td>
<td>$1,400</td>
<td>1.4%</td>
<td>$1,149</td>
<td>1.1%</td>
</tr>
<tr>
<td>Essex</td>
<td>$4,677</td>
<td>4.6%</td>
<td>$4,431</td>
<td>4.3%</td>
</tr>
<tr>
<td>Franklin</td>
<td>$363</td>
<td>0.4%</td>
<td>$333</td>
<td>0.3%</td>
</tr>
<tr>
<td>Hampden</td>
<td>$2,605</td>
<td>2.6%</td>
<td>$2,146</td>
<td>2.1%</td>
</tr>
<tr>
<td>Hampshire</td>
<td>$1,092</td>
<td>1.1%</td>
<td>$1,155</td>
<td>1.1%</td>
</tr>
<tr>
<td>Middlesex</td>
<td>$20,569</td>
<td>20.3%</td>
<td>$21,125</td>
<td>20.6%</td>
</tr>
<tr>
<td>Nantucket</td>
<td>$1,330</td>
<td>1.3%</td>
<td>$1,155</td>
<td>1.1%</td>
</tr>
<tr>
<td>Norfolk</td>
<td>$5,523</td>
<td>5.4%</td>
<td>$5,537</td>
<td>5.4%</td>
</tr>
<tr>
<td>Plymouth</td>
<td>$1,814</td>
<td>1.8%</td>
<td>$1,652</td>
<td>1.6%</td>
</tr>
<tr>
<td>Suffolk</td>
<td>$43,360</td>
<td>42.7%</td>
<td>$47,797</td>
<td>46.7%</td>
</tr>
<tr>
<td>Worcester</td>
<td>$4,019</td>
<td>4.0%</td>
<td>$3,423</td>
<td>3.3%</td>
</tr>
<tr>
<td>Total FY2010</td>
<td>101,569</td>
<td>100.0%</td>
<td>102,406</td>
<td>100.0%</td>
</tr>
<tr>
<td>Total FY2009</td>
<td>109,458</td>
<td>100.0%</td>
<td>89,815</td>
<td></td>
</tr>
</tbody>
</table>

Source: MA DOR
In 2010, the largest share of visitors’ direct expenditures was for public transportation, followed by lodging and food service. The lodging sector generated the largest payroll of any category; food service generated the most jobs.

<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>Expenditures ($ Millions)</th>
<th>% Share</th>
<th>Payroll ($ Millions)</th>
<th>% Share</th>
<th>Employment</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Transportation</td>
<td>4,575.7</td>
<td>29.5%</td>
<td>585.0</td>
<td>16.8%</td>
<td>14,000</td>
<td>11.5%</td>
</tr>
<tr>
<td>Auto Transportation</td>
<td>1,982.0</td>
<td>12.8%</td>
<td>124.7</td>
<td>3.6%</td>
<td>3,800</td>
<td>3.1%</td>
</tr>
<tr>
<td>Lodging</td>
<td>3,415.8</td>
<td>22.0%</td>
<td>870.9</td>
<td>25.1%</td>
<td>28,200</td>
<td>23.2%</td>
</tr>
<tr>
<td>Foodservice</td>
<td>3,143.8</td>
<td>20.2%</td>
<td>842.6</td>
<td>24.2%</td>
<td>46,300</td>
<td>38.0%</td>
</tr>
<tr>
<td>Entertainment &amp; Rec</td>
<td>997.0</td>
<td>6.4%</td>
<td>491.2</td>
<td>14.1%</td>
<td>16,900</td>
<td>13.9%</td>
</tr>
<tr>
<td>Retail</td>
<td>1,415.4</td>
<td>9.1%</td>
<td>195.0</td>
<td>5.6%</td>
<td>7,400</td>
<td>6.1%</td>
</tr>
<tr>
<td>Travel Planning</td>
<td>n/a</td>
<td>n/a</td>
<td>366.3</td>
<td>10.5%</td>
<td>5,300</td>
<td>4.4%</td>
</tr>
<tr>
<td></td>
<td>15,529.9</td>
<td>100.0%</td>
<td>3,475.7</td>
<td>100.0%</td>
<td>121,700</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Note: Travel Planning does not generate expenditure data Source: TIA, The Economic Impact of Travel on MA Counties, 2010

PUBLIC TRANSPORTATION

Spending in 2010 for public transportation totaled $4.6 billion, a 10.8% increase from 2009 and a 4.3% increase over 2006.

Public transportation accounted for 29.5% of all expenditures, 16.8% of payroll, and 11.5% of employment.

The public transportation industry is comprised of air, intercity bus, rail, boat, ship, taxicab and limousine services.

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>4,575.7</td>
<td>585.0</td>
<td>14,000</td>
</tr>
<tr>
<td>2009</td>
<td>4,131.1</td>
<td>575.0</td>
<td>13,800</td>
</tr>
<tr>
<td>2008</td>
<td>4,684.3</td>
<td>598.5</td>
<td>14,800</td>
</tr>
<tr>
<td>2007</td>
<td>4,624.8</td>
<td>621.6</td>
<td>14,900</td>
</tr>
<tr>
<td>2006</td>
<td>4,385.0</td>
<td>574.5</td>
<td>14,500</td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010
LODGING

Spending in 2010 for lodging totaled $3.4 billion, a 10.3% increase from 2009 and a 6.2% increase over 2006.

The lodging industry represented 22.0% of all expenditures. It generated the largest share of payroll, 25.1%, and the second largest share of employment, 23.2%.

The lodging industry comprises hotels and motels, inns, resorts, campgrounds, and ownership or rental of vacation and second homes.

FOOD SERVICE

Spending in 2010 for food service totaled $3.1 billion, an increase of 5.5% from 2009 and an increase of 16.4% over 2006.

Food service accounted for 20.2% of total expenditures. It generated the second-highest share of payroll, 24.2%, and the largest share of employment, 38.0%.

The labor-intensiveness of the food service sector and the large share of visitor expenditures spent on food results in this sector’s major contribution to the travel industry’s economic impact and to employment.

Food service comprises restaurants, other eating and drinking establishments, and grocery stores.

AUTO TRANSPORTATION

Spending in 2010 for auto transportation totaled $2.0 billion, an increase of 7.8% from 2009 and an increase of 8.7% over 2006.

Auto transportation accounted for 12.8% of all expenditures, 3.6% of payroll, and 3.1% of employment.

Auto transportation comprises privately owned vehicles used for trips (i.e., automobiles, trucks, campers, and other recreational vehicles), gasoline service stations, and auto rentals.

### Lodging Industry: Economic Impact, 2006 – 2010

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>3,415.8</td>
<td>870.9</td>
<td>28,200</td>
</tr>
<tr>
<td>2009</td>
<td>3,095.5</td>
<td>848.3</td>
<td>28,400</td>
</tr>
<tr>
<td>2008</td>
<td>3,564.0</td>
<td>938.3</td>
<td>30,900</td>
</tr>
<tr>
<td>2007</td>
<td>3,498.5</td>
<td>910.7</td>
<td>30,300</td>
</tr>
<tr>
<td>2006</td>
<td>3,215.8</td>
<td>852.5</td>
<td>29,800</td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010

### Food Service Industry: Economic Impact, 2006 – 2010

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>3,143.8</td>
<td>842.6</td>
<td>46,300</td>
</tr>
<tr>
<td>2009</td>
<td>2,980.9</td>
<td>833.9</td>
<td>46,000</td>
</tr>
<tr>
<td>2008</td>
<td>2,981.3</td>
<td>856.3</td>
<td>47,300</td>
</tr>
<tr>
<td>2007</td>
<td>2,876.0</td>
<td>832.7</td>
<td>47,100</td>
</tr>
<tr>
<td>2006</td>
<td>2,700.6</td>
<td>791.9</td>
<td>46,100</td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010

### Auto Transportation Industry: Economic Impact, 2006 – 2010

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1,982.0</td>
<td>124.7</td>
<td>3,800</td>
</tr>
<tr>
<td>2009</td>
<td>1,838.4</td>
<td>126.3</td>
<td>3,900</td>
</tr>
<tr>
<td>2008</td>
<td>2,045.8</td>
<td>128.0</td>
<td>4,000</td>
</tr>
<tr>
<td>2007</td>
<td>1,933.3</td>
<td>129.6</td>
<td>4,100</td>
</tr>
<tr>
<td>2006</td>
<td>1,824.1</td>
<td>127.8</td>
<td>4,200</td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010
ENTERTAINMENT & RECREATION

Spending in 2010 for entertainment & recreation totaled $997.0 million, up 4.4% from 2009 and an increase of 14.7% over 2006.

Entertainment & recreation accounted for 6.4% of all expenditures, 14.1% of payroll, and 13.9% of employment.

Entertainment & recreation comprises user fees, sporting events, admissions at amusement parks, and attendance at movies.

RETAIL

Spending in 2010 for general retail totaled $1.42 billion, an increase of 4.7% over 2009 and an increase of 16.3% over 2006.

General retail accounted for 9.1% of all expenditures, 5.6% of payroll, and 6.1% of employment.

General retail comprises gifts, clothes, souvenirs, and other incidental retail purchases.

TRAVEL PLANNING

In 2010, travel planning accounted for 10.5% of payroll and 4.4% of employment. This sector does not generate direct expenditures in Massachusetts because the expenditures take place in visitors’ points of origin.

Travel planning comprises travel agents, tour operators, and others involved in planning trips.
Massachusetts hosted 17.3 million domestic person trips in FY2011. See the chart of domestic visitor origins for FY2011 on p. 12.

In CY2010, Massachusetts hosted 2.0 million international person trips. 66% of the person trips were from overseas, 34% from Canada.

Massachusetts' share of all Canadian travel to the U.S. in 2010 stayed the same as 2009 at 3.4%; Massachusetts' share of overseas travel to the U.S. decreased from 5.3% to 5.0% in 2010.

For visitation numbers from top international markets, see p. 26.
In 2010, domestic visitors spent $13.5 billion in direct expenditures, a 8.5% increase from 2009 and an increase of 7.0% over 2006.

Greater Boston - Suffolk, Middlesex, and Norfolk counties - generated 68.6% of all travel expenditures, 60.7% of state tax receipts, and 56.8% of local tax receipts.

<table>
<thead>
<tr>
<th>County</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment (Thousands)</th>
<th>State Tax Receipts ($ Millions)</th>
<th>Local Tax Receipts ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barnstable</td>
<td>812.66</td>
<td>213.62</td>
<td>8.42</td>
<td>34.65</td>
<td>49.23</td>
</tr>
<tr>
<td>Berkshire</td>
<td>327.25</td>
<td>84.95</td>
<td>3.45</td>
<td>16.56</td>
<td>9.17</td>
</tr>
<tr>
<td>Bristol</td>
<td>384.36</td>
<td>82.24</td>
<td>2.94</td>
<td>20.78</td>
<td>7.60</td>
</tr>
<tr>
<td>Dukes</td>
<td>112.29</td>
<td>28.45</td>
<td>1.16</td>
<td>4.35</td>
<td>6.65</td>
</tr>
<tr>
<td>Essex</td>
<td>690.84</td>
<td>162.44</td>
<td>6.10</td>
<td>37.34</td>
<td>18.29</td>
</tr>
<tr>
<td>Franklin</td>
<td>50.73</td>
<td>9.69</td>
<td>0.36</td>
<td>2.91</td>
<td>1.69</td>
</tr>
<tr>
<td>Hampden</td>
<td>442.86</td>
<td>97.96</td>
<td>3.14</td>
<td>24.74</td>
<td>8.87</td>
</tr>
<tr>
<td>Hampshire</td>
<td>102.42</td>
<td>22.77</td>
<td>0.83</td>
<td>5.61</td>
<td>2.83</td>
</tr>
<tr>
<td>Middlesex</td>
<td>2,003.99</td>
<td>530.29</td>
<td>19.25</td>
<td>111.09</td>
<td>54.05</td>
</tr>
<tr>
<td>Nantucket</td>
<td>140.46</td>
<td>29.59</td>
<td>0.98</td>
<td>4.13</td>
<td>4.93</td>
</tr>
<tr>
<td>Norfolk</td>
<td>838.10</td>
<td>257.59</td>
<td>9.02</td>
<td>45.39</td>
<td>18.60</td>
</tr>
<tr>
<td>Plymouth</td>
<td>474.98</td>
<td>95.96</td>
<td>3.58</td>
<td>23.48</td>
<td>22.09</td>
</tr>
<tr>
<td>Suffolk</td>
<td>6,408.03</td>
<td>1,237.97</td>
<td>40.26</td>
<td>170.69</td>
<td>120.38</td>
</tr>
<tr>
<td>Worcester</td>
<td>686.02</td>
<td>139.08</td>
<td>5.24</td>
<td>37.16</td>
<td>15.50</td>
</tr>
<tr>
<td>Statewide 2010</td>
<td>13,474.99</td>
<td>2,992.62</td>
<td>104.73</td>
<td>538.88</td>
<td>339.88</td>
</tr>
<tr>
<td>Statewide 2009</td>
<td>12,419.6</td>
<td>2,929.5</td>
<td>104.4</td>
<td>495.2</td>
<td>301.8</td>
</tr>
<tr>
<td>Statewide 2008</td>
<td>13,539.5</td>
<td>3,150.6</td>
<td>110.9</td>
<td>518.5</td>
<td>323.5</td>
</tr>
<tr>
<td>Statewide 2007</td>
<td>13,346.5</td>
<td>3,137.0</td>
<td>111.7</td>
<td>516.9</td>
<td>319.1</td>
</tr>
<tr>
<td>Statewide 2006</td>
<td>12,592.2</td>
<td>2,976.0</td>
<td>110.5</td>
<td>489.9</td>
<td>300.4</td>
</tr>
</tbody>
</table>

Source: TIA, The Economic Impact of Travel on MA Counties, 2010
DOMESTIC VISITOR ORIGIN
MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

In FY2011, visitors from New England and the mid-Atlantic states (NY, NJ, and PA) accounted for 77.8% of all domestic person trips to the state.

The largest source of visitors was Massachusetts residents themselves, 5.5 million person trips, 32.0% of all domestic trips; followed by New York state with 2.3 million person trips, 13.5% of trips; and Connecticut, 1.6 million person trips, 9.4% of trips.

Again, the definition of a visitor is one who travels 50 or more miles one way or who stays overnight.

<table>
<thead>
<tr>
<th>State</th>
<th>Person Trips to Massachusetts</th>
<th>Share of all Person Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Massachusetts</td>
<td>5,544,000</td>
<td>32.0%</td>
</tr>
<tr>
<td>New York</td>
<td>2,331,000</td>
<td>13.5%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>1,625,000</td>
<td>9.4%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>953,500</td>
<td>5.5%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>713,500</td>
<td>4.1%</td>
</tr>
<tr>
<td>California</td>
<td>368,500</td>
<td>2.1%</td>
</tr>
<tr>
<td>Florida</td>
<td>534,000</td>
<td>3.1%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>694,500</td>
<td>4.0%</td>
</tr>
<tr>
<td>Maine</td>
<td>694,000</td>
<td>4.0%</td>
</tr>
<tr>
<td>Virginia</td>
<td>232,500</td>
<td>1.3%</td>
</tr>
<tr>
<td>All Other States</td>
<td>2,708,500</td>
<td>15.6%</td>
</tr>
<tr>
<td>All New England States</td>
<td>9,933,000</td>
<td>57.4%</td>
</tr>
<tr>
<td>All Mid Atlantic States</td>
<td>3,536,500</td>
<td>20.4%</td>
</tr>
</tbody>
</table>

Source: TNS, Travels America, FY2010 & FY2011
DOMESTIC TRIP DURATION & COMPOSITION
Just under 2/3 of all person trips in FY2011 included an overnight stay. Overnight visitors averaged 4 nights in Massachusetts. All visitors — overnights and those on day trips — averaged 3 nights.

22.0% of all travel parties included one or more children less than 18 years of age.

DOMESTIC TRANSPORTATION MODE
The majority of visitors, 68.3%, drive their own vehicle to Massachusetts. Air travel ranks second at 18.4%.

DOMESTIC LODGING
45.1% of overnight visitors stay in a hotel/motel/inn or B&B, 44.3% in a private home.

DOMESTIC TRIP PURPOSE (PRIMARY)
Visiting friends or relatives is the dominant trip purpose and accounts for 45.8% of all domestic trips. Entertainment and sightseeing accounts for 11.2% of all trips.

DOMESTIC TRIP ACTIVITIES
Visiting relatives is the most frequently reported trip activity by domestic visitors, 26.8%, followed by visiting friends, 18.5% and shopping, 17.3%. Fine dining, beaches, urban sightseeing, rural sightseeing, historical places/churches, museums and state/national parks make up the remaining top activities.
MOTT MISSION

MOTT is the state agency dedicated to promoting Massachusetts as a leisure travel destination in order to stimulate the Massachusetts economy by generating state and local tax revenues, creating jobs, and supporting the growth of travel-related businesses.

DOMESTIC MARKETING OVERVIEW

MOTT’s domestic marketing programs focus on generating overnight leisure travel by consumers in selected media markets within Boston, New England and New York. Research is used extensively to determine best customer prospects, markets, campaign timing, messages and collateral materials. It is also used to evaluate results. Advertising spending is focused heavily on the summer and fall seasons. In FY11 we added more focus on the winter season to support the program activities taking place in Massachusetts during those seasons. Public relations is used year round to help keep MOTT’s messaging in the marketplace. MOTT’s marketing programs are fully integrated with a mix of broad-based media.

<table>
<thead>
<tr>
<th>Massachusetts Market Share From Target DMAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMA</td>
</tr>
<tr>
<td>----------------------</td>
</tr>
<tr>
<td>New York City DMA</td>
</tr>
<tr>
<td>Hartford/New Haven DMA</td>
</tr>
<tr>
<td>Albany/Troy DMA</td>
</tr>
<tr>
<td>Providence/New Bedfd DMA</td>
</tr>
<tr>
<td>Boston DMA</td>
</tr>
<tr>
<td>Sprgfld/Hlyke DMA</td>
</tr>
</tbody>
</table>

Source: TNS FY2011 & FY2010

FY2011 DOMESTIC MARKETING PROGRAMS

MOTT’s programs are research driven and targeted at best customer prospects and are rigorously evaluated both during and post program. All marketing programs target Massachusetts’ best customer prospects: 35-64 years old with a household income of $75,000+. Media is skewed toward women, who have a greater propensity to plan and make travel decisions. In FY11, we allocated 36.48% of media budget to online and radio and reduced our print and broadcast expenditures to niche markets.

Programs: Television, Radio, Online Advertising Campaign, www.massvacation.com, Public Relations, Targeted Consumer Outreach, Social Media: Facebook, Twitter, Blog; Niche Programming; LGBT; group tour; Multicultural. (see media chart table on page 15)

- Television
- Radio
- Online Advertising Campaign
- www.massvacation.com
- Public Relations
- Targeted Consumer Outreach
- Social Media: Facebook, Twitter
- Massachusetts Lure Brochure
- Niche Programming:
  - MA Green
  - LGBT
  - Small Meetings
  - Multicultural
  - Weddings
  - Accessibility
  - Culinary
  - Group Tour
## MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

<table>
<thead>
<tr>
<th>Domestic Marketing Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Domestic Marketing</strong></td>
</tr>
<tr>
<td><strong>Public relations</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Media</th>
<th>FY11</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net media</strong></td>
<td>$2,076,077.93</td>
</tr>
<tr>
<td><strong>ALLOCATION BY MARKET</strong></td>
<td></td>
</tr>
<tr>
<td>New York DMA</td>
<td>59.99%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>24.91%</td>
</tr>
<tr>
<td>Both Markets</td>
<td>14.76%</td>
</tr>
<tr>
<td>National</td>
<td>.35%</td>
</tr>
<tr>
<td><strong>ALLOCATION BY MEDIA</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TV</strong></td>
<td></td>
</tr>
<tr>
<td>New York</td>
<td>$1,112,811.53</td>
</tr>
<tr>
<td>Boston</td>
<td>$76,712.50</td>
</tr>
<tr>
<td><strong>RADIO</strong></td>
<td></td>
</tr>
<tr>
<td>Boston</td>
<td>$74,825,50</td>
</tr>
<tr>
<td><strong>PRINT</strong></td>
<td></td>
</tr>
<tr>
<td>New York Print (includes eth)</td>
<td>$57,311.50</td>
</tr>
<tr>
<td>Boston Print (includes eth)</td>
<td>$64,562.99</td>
</tr>
<tr>
<td>Group Tour (nat)</td>
<td>$7,247.60</td>
</tr>
<tr>
<td><strong>DIGITAL</strong></td>
<td></td>
</tr>
<tr>
<td>Ma Digital</td>
<td>$300,960.00</td>
</tr>
<tr>
<td>New York Digital</td>
<td>$75,219.00</td>
</tr>
<tr>
<td>Both Markets (includes social search and ad serving)</td>
<td>$306,357.31</td>
</tr>
</tbody>
</table>
MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

FY11 MARKETING CAMPAIGN

- Tagline: It’s All Here
- Markets: Massachusetts, New York DMA
- Television: (See page 18)
- Radio Spots
  February Vacation Radio
  Better to Stay in MA - Skiing :30
  Focused on why it’s better to stay in Massachusetts for February school vacation.
  Created in January/February 2011
  Ran on air in Massachusetts - 2 weeks in February 2011

  April Vacation Radio
  Vacation Requirements :30
  Focused on why it’s better to stay in Massachusetts for April school vacation.
  Created in March/April 2011
  Ran on air in Massachusetts - 2 weeks in April 2011

  Print (See page 19)
  Online

- Fall Foliage Campaign
  Display banners that focused on Massachusetts being a great destination to view fall foliage and for fall events.
  Created in August/September 2011
  Ran on sites in Massachusetts & New York DMA - September & October 2011

- Winter Fun
  Display banners that focused on planning a winter getaway in Massachusetts, as there’s so much Winter Fun here.
  Ran on sites in Massachusetts & New York DMA - January - May 2011

February Vacation Campaign
  Display banners focused on planning your February School vacation in Massachusetts.
  Created in January 2011
  Ran on sites in Massachusetts & New York DMA - February 2011

Mass Insider & Spring/Summer Fun Campaigns
  Display banners promoted the Mass Insider program, where consumers can “like” Visit Massachusetts on Facebook for deals, exclusive giveaways and insider info on Massachusetts.
  We also ran another banner campaign focused on planning a summer vacation in Massachusetts.
  Created in March/April 2011
  Ran on sites in Massachusetts & New York DMA - May & June 2011

Social Media Ads
  We ran ad copy on Facebook and Twitter that promoted the Mass Insider program.
  Created in March 2011
  Ran on Facebook & Twitter, targeting Massachusetts & New York DMA - April - June 2011

Pay-Per-Click Search Ads
  We ran ad copy on Google, which aligned with which ever campaign/message was running online at the same time.
  Ran on Google, targeting Massachusetts & New York DMA - February 2011 - June 2011
MASS INSIDER PROGRAM

The ‘Mass Insider’ program is currently a social media initiative (Facebook only). We encourage users to “Like” MOTT on FB to receive the latest deals, insider tips, event information and exclusive promotions via the news feed. The program has been successful in growing MOTT Facebook fans (roughly 4k to 80k). We’ve encouraged others to join the conversation on our page and to gain access to the following benefits as a Mass Insider:

- Fun events & activities around the state
- Insider tips/Community of people sharing tips, info, “off the beaten path” recommendations
- Last minute deals/discounts around the state
- Giveaways

The purpose of this program is to grow MOTT’s social media fan-base and continue the conversation with fans of Massachusetts by engaging them with contests, giveaways, etc. We’ve also been able to increase traffic to the site by designing a Mass Insider landing page that the Mass Insider display banners now click-thru to. On this landing page, the program is explained and the user can “like” the Visit Massachusetts Facebook page right from massvacation.com.

NO ROI study done in FY11
TELEVISION SPOTS
Created in May 2011. Ran on air in Massachusetts & New York DMA from May 2011 - July 2011

TELEVISION
Couples :30 and Couples :15
Features 3 different couples who are visiting art galleries, beaches, parks and picnicking on Charles River. The idea being that although you may spend money on your vacation in Massachusetts, there are also great places in the state that don't cost a thing.

Families :30 and Families :15
Features 2 different families who are on a fun and adventurous vacation in Massachusetts, going to amusement parks, the aquarium, parks and beaches. The idea being that although you may spend money on your vacation in Massachusetts, there are also great places in the state that don't cost a thing.
PRINT

Opportunistic Print
Colors Campaign “Green” Creative
Visual and copy representing the “green” in Massachusetts, including the 37-foot-high Monster in Fenway Park, trees along the Ipswich River or the fairways at Pinehills golf course.
Created in 2010; Repurposed in February 2011
Ran in Boston & New York - March - June 2011

Group Tour Print
Colors Campaign “All Colors” Creative
Visual and copy representing the various colors in Massachusetts, including a 40-ton humpback whale leaping out of the deep blue Atlantic Ocean or the red bricks of the Freedom Trail.
Created in 2010; Repurposed in April 2011
Ran Nationally & in New England - May 2011

Ethnic Print
“Open Book” Creative
Visual of an open book with various different sights, attractions and things to do in Massachusetts. The copy of the ad was promoting our Mass Insider program on Facebook.
Created in April 2011
Ran in Boston & New York - May - June 2011
**LGBT MARKETING PROGRAM**

In CY2011, MOTT enhanced the marriage resource microsite geared towards the LGBT community. The site contains information about how to get married in the Commonwealth of Massachusetts and simplifies the process for both residents and non-residents. In addition, the LGBT Facebook page had nearly 14,000 fans and the LGBT Twitter account surpassed 1,300 followers. The LGBT site had 78,000 visits and 180,000 page views in CY2011.

**GROUP TOUR**

MOTT markets Massachusetts year round as a group travel destination, working proactively with tour operators and travel agents.

**Group Tradeshows:**

MOTT staff attended, maintained and created new relationships with tour operators and travel agents as well as generating leads for the Massachusetts travel industry. Massachusetts (MOTT) attended American Bus Association Marketplace, National Tour Association Travel Exchange, Ontario Motorcoach Association Marketplace and Cruise Canada New England Symposium.

**Group Travel Advertising**

MOTT advertising can be found in Destinations (American Bus Association publication), Courier (National Tour Association publication), Black Meetings & Tourism, Packaged Travel Insider and Group Tour Magazine.

**Group Travel Promotions**

Massachusetts participated in the National Tour Association Tour Operator Profile Book

MOTT collaborated with Regional Tourism Councils and other New England state tourism offices on joint group tour programs.

**GOALS**

To consistently educate domestic tour operators and travel agents on the newest Massachusetts product and position Massachusetts as a top group tour destination.

**RESULTS**

In FY11, the Massachusetts group tour program generated over 250 qualified leads from new and current tour operators and travel agents who actively book groups to Massachusetts.
MOTT operates a highly interactive Web site, massvacation.com, that provides users with comprehensive information about what to see and do, where to stay, and how to plan a trip. In CY11, MOTT, once again, had seasonal micro sites for fall foliage and winter fun which generated high seasonal traffic. Other content:

- Information centers
- Events up to 24 months in advance
- Mapping and travel directions
- Special lodging deals
- Special offers from MOTT’s marketing partners
- Order form for travel information from RTCs and Chambers of Commerce
- Links to attractions, hotels, regional tourism councils, and other travel sites
- Ongoing contest to win a Massachusetts prize package
- Press room
- Free listings for all Massachusetts businesses
RESULTS

In 2011, the site hosted 1,080,604 visits (a 13.4% increase from 2010) which resulted in more than 4.2 million page views. 88% of users were U.S. residents. The next five top countries of origin were Canada, the U.K., Germany, Italy, and France. The most visited topical pages viewed after the Homepage were Fall Foliage and Winter Fun pages. The top region pages visited, in order, were Cape and the Islands, Greater Boston, Western Mass, North of Boston, and South of Boston.
FARM FULFILLMENT AND RELATIONSHIP MARKETING

Throughout 2010 MOTT continued to increase FARM, our consumer Fulfillment and Relationship Marketing database. This database is used to support the seasonal promotions, and direct mail programs. The primary source for acquiring new FARM customers and for updating existing customer records is via www.massvacation.com. FARM complies with CAN-SPAM best practices.

RESULTS

At the end of 2010 the number of consumer records in FARM totaled 960,223. Of these, 284,326 were permission emails. 88.3% of the total records are U.S customers. 5.5% are Canadian and 6.2% represent all other countries.

GOVERNOR’S CONFERENCE

MOTT host the annual Governor’s Conference on Travel & Tourism. 2011 marked its 24th year, the conference attracts more than 400 industry professionals who convene for networking with their colleagues from across the Commonwealth’s travel sector. The conference features a Keynote by the Governor and presentations by other industry leaders. The conference includes panel discussions, workshops and an industry marketplace with relevant information and tools for tourism professionals. 2012 celebrates 25 years.

PUBLIC RELATIONS

MOTT’s public relations program aims to promote the Commonwealth as a premier leisure destination, rich in culture and diversity. The majority of the program’s focus is on media relations, gaining valuable third-party endorsements from respected travel press, and in turn, influencing consumer behavior when it comes to visiting Massachusetts.

As a result of MOTT’s public relations efforts, Massachusetts has enjoyed positive coverage in nation’s top circulating publications, regional newspapers and magazines and online travel and lifestyle sites.

JOURNALISTS TO MASSACHUSETTS

MOTT works closely with Massachusetts’ lodging facilities and attractions to stay up-to-date on their services and special events, in order to serve as an information resource to journalists wishing to visit the state. Working personally and directly with journalists, MOTT packages tours throughout the commonwealth for coverage online, in print, broadcast & radio.

Through the efforts MOTT’s public relations team, journalists representing the following publications visited or wrote about the Commonwealth in CY 2011:

AAA New England
About.com
Alaska Airlines Inflight Magazine
Away.com
Bing Travel
Black Meetings & Tourism
Boston Globe
Boston.com
Boston Herald
Boston Metro
Bringing it Home with Laura McIntosh
BUMP – logo TV
Exhale Magazine
Edge Publications
Globetrotting
Go:AirTran airways inflight magazine
GO! Magazine
MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

L.L. Bean’s Guide to the Outdoors
METRO
National Geographic Traveler
Newsday
NY Post
NY1 News
Nylon Magazine
P3 Magazine
Taking–the-Kids
Time Out New York
Travel & Leisure
Today Show
USA Today
Washington Examiner

Global Eats in Modern Massachusetts
A State of Green
The Art of Great Gardens

MASSVACATION.COM PRESS ROOM

In CY2011 MOTT updated its press room with new images, information, press materials and story ideas. In addition, HD footage is available free of charge to promote the state via broadcast. The press room also posts leads for the entire industry to take advantage of, and get the opportunity to showcase their properties, attractions or events for interested journalists.

LOCAL AND NATIONAL CONSUMER BUSINESS
AND TRADE MEDIA RELATIONS

MOTT regularly researches, prepares and distributes press releases that cover a wide range of topics aimed to stimulate media interest. In FY11, a sample of the releases MOTT distributed:

Seaside Autumn Escape
From Haunts To Harvest
Massachusetts Latin Vibe
Iconic Thanksgiving
MA Taverns Warm Travelers
Holiday Massachusetts
Celebrating Massachusetts
Spectacle of Lights and Holiday Festivities
Not Your Average New Years Celebrations
Welcome the New Year with an offbeat, only-in-Massachusetts Way.
Snowy State of Mind
Black History Month
Celebrating Chemistry in Massachusetts
February School Vacation Week
April School Vacation Week
Massachusetts Music Scene: Marching to a New Beat

SUPPORT ADVERTISING AND MARKETING PROGRAMS

MOTT’s integrated marketing team launched a new and innovative promotional campaign in FY2011. The public relations group promoted the campaign in national and regional trade and consumer press. Coverage appeared in the following press:

WCVB-TV (Ch. 5)
The BostonChannel.com/Boston Globe
Associated Press
Boston Herald
NECN
NY1
NY DMO Targets

TOURISM U

Tourism U is a series of FREE presentations hosted around the state by the Massachusetts Office of Travel & Tourism (MOTT) for the travel and tourism industry. Tourism U is designed to help increase awareness of the programs that MOTT offers to the industry and to encourage participation.

MOTT offered presentations on International, Research, Film, Sports, Domestic Marketing, Online Digital Marketing and LGBT Marketing in various regions around the state.
STRATEGY

To market and promote Massachusetts as a premier travel destination in primary overseas markets (Canada, United Kingdom, and Germany) and in secondary markets (Japan, France, Italy, and Ireland).

MOTT contracts with destination marketing agencies in its primary and secondary markets to implement comprehensive promotional programs.

Marketing and public relations activities include, but are not limited to: ongoing proactive travel trade outreach, international travel trade and consumer shows, destination training programs, cooperative marketing with in-market travel partners, familiarization (FAM) tours, media relations, and consumer promotions.

TRAVEL TRADE PROMOTION

MOTT’s travel trade promotion consists of proactive outreach to tour operators whose brochures feature New England and Massachusetts product. MOTT works to secure current product, to expand product offerings, to support cooperative opportunities (consumer promotion, direct mail, point of purchase, etc.), and to assist in itinerary development. As needed, MOTT will provide tour operators with videos, promotional items, and literature to support promotion.

MOTT works in partnership with major airlines in each primary and secondary market to develop cooperative promotions.

MEDIA RELATIONS

Media relations conducted in MOTT’s primary and secondary markets generate valuable earned media coverage for the state. MOTT’s in-market agencies provide story ideas, issue press releases, develop/distribute e-newsletters, and respond to image/b-roll requests. In fiscal year 2011, the earned media value totaled $10.8 million.

INDUSTRY PARTICIPATION

Familiarization Tours; Event Information; Thematic Itineraries; New Product; Imagery; Events/Shows: Governor’s Conference, Pow Wow, Discover New England Summit

INTERNATIONAL VISITS TO MA, CY2010

<table>
<thead>
<tr>
<th>Visitor Est. Volume (000s)</th>
<th>Share of Country Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>662</td>
</tr>
<tr>
<td><strong>ALL OVERSEAS</strong></td>
<td>1,292</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>189</td>
</tr>
<tr>
<td>Germany</td>
<td>121</td>
</tr>
<tr>
<td>Japan</td>
<td>71</td>
</tr>
<tr>
<td>Ireland</td>
<td>21</td>
</tr>
<tr>
<td>France</td>
<td>70</td>
</tr>
<tr>
<td>Italy</td>
<td>41</td>
</tr>
<tr>
<td>Netherlands</td>
<td>35</td>
</tr>
<tr>
<td>Brazil</td>
<td>54</td>
</tr>
<tr>
<td>Spain</td>
<td>30</td>
</tr>
<tr>
<td>Argentina</td>
<td>19</td>
</tr>
<tr>
<td>South America</td>
<td>133</td>
</tr>
<tr>
<td>Belgium</td>
<td>13</td>
</tr>
<tr>
<td>Australia</td>
<td>86</td>
</tr>
<tr>
<td>China</td>
<td>79</td>
</tr>
</tbody>
</table>

Source: Dept. of Commerce, Stats Canada
## MOTT INTERNATIONAL MARKETS OVERVIEW CY2010

<table>
<thead>
<tr>
<th>Country</th>
<th>Marketing Firm</th>
<th>Visitation to MA</th>
<th>Est. Visitor Spending</th>
<th>Est. MA State Taxes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>VOX International Inc</td>
<td>662,000 Visitors</td>
<td>$352 M</td>
<td>$14.3 M</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Travel &amp; Tourism Marketing</td>
<td>189,000 Visitors</td>
<td>$312 M</td>
<td>$12.7 M</td>
</tr>
<tr>
<td>Germany</td>
<td>Buss Consulting</td>
<td>121,000 Visitors</td>
<td>$187 M</td>
<td>$7.6 M</td>
</tr>
<tr>
<td>Japan</td>
<td>Global Consulting</td>
<td>71,000 Visitors</td>
<td>$129 M</td>
<td>$5.2 M</td>
</tr>
<tr>
<td>Ireland</td>
<td>Tara Travel Services</td>
<td>21,000 Visitors</td>
<td>$27 M</td>
<td>$1.1 M</td>
</tr>
<tr>
<td>France</td>
<td>Express Conseil</td>
<td>70,000 Visitors</td>
<td>$119 M</td>
<td>$4.8 M</td>
</tr>
<tr>
<td>Italy</td>
<td>Thema Nuovi Mondi</td>
<td>41,000 Visitors</td>
<td>$68 M</td>
<td>$2.7 M</td>
</tr>
</tbody>
</table>
REGIONAL TOURIST COUNCILS AND REGIONAL TOURISM GRANT PROGRAM

Massachusetts’ 16 Regional Tourist Councils (RTCs) are independent, membership-based, not-for-profit organizations that market their regions as travel destinations. RTCs are funded by membership fees, other private-sector revenues sources, and funds from the Regional Grant Program.

The Regional Grant Program was established by statute (Chapter 23A, Section 14) and is managed by MOTT. It provides state funds to each RTC to support its destination marketing programs. The grant program requires that RTCs match their grants with a minimum one-to-one match of nongovernmental funds. Grants are awarded based on a performance-based formula which evaluates the economic impact of RTCs’ efforts (50%), their marketing plans (30%), and their abilities to raise matching funds (20%).

RTC FY2012 Grant Allocation Summary

<table>
<thead>
<tr>
<th>Regional Tourist Council</th>
<th>FY 2012 Grant Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berkshire VB</td>
<td>$342,010.78</td>
</tr>
<tr>
<td>SE Mass CVB</td>
<td>$92,910.75</td>
</tr>
<tr>
<td>Cape Cod Chamber</td>
<td>$564,528.84</td>
</tr>
<tr>
<td>Franklin County Chamber</td>
<td>$224,675.23</td>
</tr>
<tr>
<td>Greater Boston CVB</td>
<td>$2,056,153.95</td>
</tr>
<tr>
<td>Merrimack Valley CVB</td>
<td>$346,298.12</td>
</tr>
<tr>
<td>Greater Springfield CVB</td>
<td>$332,861.46</td>
</tr>
<tr>
<td>Martha’s Vineyard Chamber</td>
<td>$265,677.64</td>
</tr>
<tr>
<td>Nantucket Chamber</td>
<td>$279,097.81</td>
</tr>
<tr>
<td>North of Boston CVB</td>
<td>$278,430.91</td>
</tr>
<tr>
<td>Plymouth County CVB</td>
<td>$258,755.64</td>
</tr>
<tr>
<td>Central Mass CVB</td>
<td>$300,955.84</td>
</tr>
<tr>
<td>Mohawk Trail Association</td>
<td>$129,480.00</td>
</tr>
<tr>
<td>METROWEST</td>
<td>$90,000.00</td>
</tr>
<tr>
<td>JOHNNYAPPLESEED</td>
<td>$174,611.32</td>
</tr>
<tr>
<td>HAMPSHIRE</td>
<td>$263,551.72</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
<td><strong>$6,000,000</strong></td>
</tr>
</tbody>
</table>

Source: MOTT

Photography Courtesy of:

Cover: Tim Grafft/MOTT
Page 2: Battleship Cove
Page 5: Arnold Arboretum, Basketball Hall of Fame
Page 7: Bill DeSousa-Mauk
Page 10: Tim Grafft/MOTT
Page 11: Kindra Clineff/MOTT
Page 12: Tim Grafft/MOTT
Page 15: Tim Grafft/MOTT
Page 16: Cambridge Riverfront Festival, Chinatown Cultural Association
Page 17: Boston Athletic Association, Golf Cape Cod