



## ***MOTT TravelStats Newsletter – DECEMBER, 2019***

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@mass.gov](mailto:Tony.Dagostino@mass.gov)

### **Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: November, 2019**

- During the month of November, 2019, Massachusetts statewide lodging room demand (1,637.6k) decreased by 4.8% compared to November 2018 (1,720.9k). The average daily room rate decreased by 6.2% to \$169.31 from \$180.47. Occupancy rates, which reflect changes in both supply and demand for rooms decreased by 5.1 percentage points to 63.8% from 68.9%. Overall room revenue decreased 10.7% to \$277.3 mil from \$310.57 mil.

#### **Massachusetts Hotel Lodging Data**

**Month of November, 2019**

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions\$)
2019	1,637.6	169.31	63.8	277.3
2018	1,720.9	180.47	68.9	310.6
2017	1,567.9	168.8	64.8	264.7

- REVPAR CYTD, which is a function of occupancy rate and room rate, decreased for CYTD November over same period last year by 2.1% to \$134.06 from \$137.00. Occupancy rate decreased 2.8% and the room rate increased 0.7%.

**REVPAR CYTD November, 2019**

Year	(\$'s)	% Change
2019	134.06	-2.1
2018	137.00	3.4
2017	132.43	2.5

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

## **State Room Occupancy Taxes: November, 2019 & FY 2020 thru November**

- **For the month of November, 2019 (FY20),** the net room occupancy tax collections of \$32.8 mil increased by 2.5% from the November 2018 (FY19) collections of \$32.8 mil. The November 2018 collections were a 12.5 % increase from the November 2017 (FY18) collections of \$29.1 mil.

### **State Room Occupancy Tax Collections**

#### **Month of November**

<b>Year</b>	<b>\$ (000)</b>	<b>% Change</b>
FY2020	32,837.2	2.5
FY2019	32,755.1	12.5
FY2018	29,111.4	8.9

- **For FY2020 YTD November,** the net room occupancy tax collections of \$174.8 mil increased by 13.4% from the November 2018 (FY19) collections of \$154.2 mil. The November 2018 collections were a 8.4% increase from the November 2017 (FY18) collections of \$142.3 mil.

#### **FYTD thru November**

<b>Year</b>	<b>\$ (000)</b>	<b>% Change</b>
FY2020	174,789.1	13.4
FY2019	154,185.8	8.4
FY2018	142,345.7	3.0

**Source: Mass DOR Monthly Report of Collections and Refunds**

### **Local Option Room Occupancy Taxes: November, 2019 & FY 2020 thru November**

- **For the month of November, 2019 (FY20),** the local option room occupancy tax collections of \$27.0 mil increased by 2.2% from the November 2018 (FY19) collections of \$26.4 mil. The November 2018 collections were a 13.2% increase from the November 2017 (FY18) collections of \$23.4 mil. (Note: MA law allows local option tax rate increases in communities).

#### **Local Room Occupancy Tax Collections**

##### **Month of November**

<b>Year</b>	<b>\$ (000)</b>	<b>% Change</b>
FY2020	27,033.2	2.2
FY2019	26,457.2	13.2
FY2018	23,369.1	8.5

- **For FY2020 YTD November,** local option room occupancy tax collections totalled \$144.3 mil, a 15.1% increase from FY2019 total of \$125.3 mil. The FY2019 collections were 8.4% more than the FY2018 collections of \$115.7 mil. (See note above).

##### **FYTD thru November**

<b>Year</b>	<b>\$ (000)</b>	<b>% Change</b>
FY2020	144,262.9	15.1
FY2019	125,330.0	8.4
FY2018	115,675.8	2.9

Source: Mass DOR Monthly Report of Collections and Refunds

### **Ma Tourism Fund (MTF) Collections thru November: FYs 2020 and 2019**

- The FY2020 year to date thru November 2019 the MTF collections totaled \$5,000,000. The amount reported collected for the same period in FY2019 was \$5,000,000.

Source: Mass DOR Monthly Report of Collections and Refunds

### **Museum and Attraction Attendance: November, 2019 and CYTD 2019**

- Massachusetts's museum and attraction attendance decreased by 3.6% in the month of November, 2019 compared to November, 2018 (796,376 visitors vs 826,032 visitors). The total net visitor decrease was 29,656 visitors at the 75 sites reporting visitor data.
  
- For calendar year 2019 through November, attendance was up 0.1% to 11,516,021 from the 11,504,035 visits during the same period in CY2018, an increase of 11,986 visitors.  
  
(Note: 75 sites reported data for November 2019)

**Source: NEMA Monthly attendance report**

## **Logan International Airport Passenger Volume: November 2019 and CYTD 2019**

- In **November 2019**, the number **Domestic passenger arrivals and departures** of 2.71 mil was a decrease of 1.5% from the November 2018 total of 2.75 mil.
- The CYTD 2019 through November total was 31.3 million, up 2.0% from the 30.7 mil in the same period of CYTD 2018.
- The number of **International passenger arrivals and departures** increased in November 2019 by 2.3% compared to November 2018 to 552.1 k from 539.6 k.
- The CYTD 2019 totals were up 9.9% to 7.7 mil from 7.0 mil the prior year.

**Domestic Passenger Volume**

November	(000)s	% Change
2019	2,705.2	-1.5
2018	2,747.6	5.8
2017	2,596.1	5.7

**International Passenger Volume**

November	(000)s	% Change
2019	552.1	2.3
2018	539.6	11.6
2017	483.4	6.1

**Domestic Passenger Volume**

CYTD November	(000)s	% Change
2019	31,336.8	2.0
2018	30,736.5	7.1
2017	28,697.4	5.1

**International Passenger Volume**

CYTD November	(000)s	% Change
2019	7,696.6	9.9
2018	7,005.9	4.9
2017	6,679.7	9.9

## **Domestic Visitation to Massachusetts FY 2019:**

Domestic visitors' origin, number of person trips (visits) and share of total trips to Massachusetts.

<b><u>Origin State</u></b>	<b><u>Person trips (000)</u></b>	<b><u>Share of all trips</u></b>
Massachusetts	8,389	31.4%
New York	3,779	14.1%
Connecticut	2,698	10.1%
New Hampshire	1,785	6.7%
Rhode Island	1,070	4.0%
California	604	2.3%
Florida	614	2.3%
New Jersey	1,246	4.7%
Maine	692	2.6%
Pennsylvania	775	2.9%
Vermont	583	2.2%
 Above Total	 22,235	 83.1%
 All Other States	 4,539	 17.0%
 All New England States	 15,217	 56.9%
All Mid-Atlantic States	5,800	21.7%
Total Trips	26,759	100%

All numbers based on rolling 2 year average

The total domestic trips to Massachusetts in FY2019 were 26.8 million. The primary trip purpose in FY2019 was Visiting Friends and/or Relatives (49.1%), the top activities were attending a family/social event (43.0%) followed by shopping (21.1%), and 71.6% of all domestic visitors arrived in their own vehicle. Of the visitors that stayed overnight, 52.1% stayed in a hotel/motel/inn or B&B. Please see the Travel Industry Report on massvacation.com for more details.

**Note: All values are based on 2-year rolling average**

Source: TNS, Travels America , MOTT TRAVEL INDUSTRY REPORT CY2018

# International Visitors to MA CY 2018 & CYTD 2019 October to U.S.:

	Visitors to Massachusetts		Visitors to U.S. in CY 2019 through October	
	2018 Visitors (000s)	% Change from 2017	2019 Visitors through October (000s)	% Change from 2018 through October
<b>ALL OVERSEAS</b>	<b>1,826</b>	<b>5.5%</b>	<b>34,002</b>	<b>1.0%</b>
<b>Canada</b> (U.S. thru Sept 2019)	<b>682</b>	<b>4.7%</b>	<b>16,102</b>	<b>-3.9%</b>
<b>United Kingdom</b>	<b>243</b>	<b>7.8%</b>	<b>4,061</b>	<b>3.1%</b>
<b>China</b>	<b>298</b>	<b>2.4%</b>	<b>2,521</b>	<b>-5.5%</b>
<b>Germany</b>	<b>114</b>	<b>-14%</b>	<b>1,773</b>	<b>-0.2%</b>
<b>France</b>	<b>100</b>	<b>10.6%</b>	<b>1,593</b>	<b>4.1%</b>
<b>Japan</b>	<b>54</b>	<b>-17.1%</b>	<b>3,125</b>	<b>7.4%</b>
<b>Italy</b>	<b>61</b>	<b>33%</b>	<b>913</b>	<b>1.2%</b>
<b>India</b>	<b>89</b>	<b>2.9%</b>	<b>1,280</b>	<b>5.1%</b>
<b>Brazil</b>	<b>85</b>	<b>28.8%</b>	<b>1,724</b>	<b>-3.1%</b>
<b>Spain</b>	<b>43</b>	<b>-1.2%</b>	<b>783</b>	<b>7.0%</b>
<b>Australia</b>	<b>51</b>	<b>-3.8%</b>	<b>1,115</b>	<b>-2.6%</b>
<b>Ireland</b>	<b>56</b>	<b>48%</b>	<b>434</b>	<b>-2.4%</b>
<b>Sweden</b>	<b>74</b>	<b>17.5%</b>	<b>374</b>	<b>-11.1%</b>
<b>South Korea</b>	<b>65</b>	<b>-11.1%</b>	<b>1,898</b>	<b>-0.2%</b>

Note: All Overseas estimates to MA based on 2-year rolling average



### **Travel to Massachusetts from MOTT target markets in CY2018**

- OVERSEAS visits to Massachusetts during **CY2018** totaled 1.8 **million**. This was an increase of 5.5% from **CY2017**. The top four Overseas origin countries to visit MA were the UK 243k (up 7.8%), China 298k (up 2.4%), Germany 114k (down 14%) and France 100k (up 10.6%).

### **Massachusetts market share of Overseas for CY2018 and Canadian visitation for CY2017**

- For CY2018, Massachusetts captured 4.6% of all Overseas travel to the U.S. All Canadian visitation to MA totaled 650k in CY2017, which was a 3.3% share for MA.

### **Travel to U.S. from Overseas and MOTT target markets, CY 2019 through October**

- Travel to U.S. from Overseas for CYTD October 2019 was up 1.0%. Visits to U.S. from Japan were up 7.4%, down 5.5% from China, down 0.2% from Germany, up 3.1% from the UK, down 2.4% from Ireland and up 1.2% from Italy. Travel from Canada to the U.S. was down 3.9% through November 2019.

**Source: U.S. Dept. of Commerce, OTTI and MOTT 2-yr average for all Overseas to MA only**

## **Direct Economic Impact of Travel and Tourism, CY2018**

- Domestic and International traveler expenditures totaled \$24.2 Billion in MA during CY2018.

Domestic traveler spending totaled \$19.9 Billion, while international traveler spending totaled \$4.3 Billion. This spending supported 143,200 jobs. Travel spending is comprised of several sub industries as noted below.

<b>Travel Expenditures</b>	<b>Domestic</b>		<b>International</b>		<b>Total</b>	
	<b>2018</b>		<b>2018</b>		<b>2018</b>	
	<b>(\$ Millions)</b>		<b>(\$ Millions)</b>		<b>(\$ Millions)</b>	
Public Transportation	\$6,235.1	31.4%	\$475.0	11.1%	\$6,710.2	27.8%
Auto Transportation	2,631.3	13.2%	58.1	1.4%	2,689.4	11.1%
Lodging	4,603.8	23.2%	1,649.8	38.4%	6,253.6	25.9%
Foodservice	4,015.4	20.2%	843.6	19.7%	4,859.0	20.1%
Entertainment & Recreation	1,136.8	5.7%	327.5	7.6%	1,464.3	6.1%
General Retail Trade	1,241.3	6.2%	938.7	21.9%	2,180.0	9.0%
<b>Total</b>	<b>\$19,863.8</b>	<b>100.0%</b>	<b>\$4,292.7</b>	<b>100.0%</b>	<b>\$24,156.5</b>	<b>100.0%</b>

### **Economic Impact of Domestic Travel on Massachusetts Counties, 2018**

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ M)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ M)</u>	<u>Local Tax Receipts (\$ M)</u>
Barnstable	\$1,122.1	\$309.4	9.6	\$50.2	\$69.3
Berkshire	467.9	124.5	4.0	24.2	13.8
Bristol	533.4	116.3	3.3	29.2	10.8
Dukes	150.5	39.8	1.3	6.0	8.9
Essex	1,008.4	246.8	7.3	55.6	26.3
Franklin	66.5	13.1	0.4	3.8	2.2
Hampden	578.2	138.9	3.5	33.3	12.1
Hampshire	148.5	34.0	1.0	8.3	4.1
Middlesex	2,913.1	818.8	22.7	167.8	79.5
Nantucket	181.3	41.7	1.1	5.8	6.5
Norfolk	1,268.4	410.0	11.3	70.8	28.7
Plymouth	671.4	142.2	4.2	34.1	31.8
Suffolk	9,760.7	2,011.1	49.6	266.8	187.0
<u>Worcester</u>	<u>993.4</u>	<u>206.0</u>	<u>6.1</u>	<u>54.9</u>	<u>23.1</u>
<b>Statewide</b>	<b>\$19,863.8</b>	<b>\$4,652.6</b>	<b>125.4</b>	<b>\$810.8</b>	<b>\$503.8</b>

Source: USTA Economic Impact of Travel on MA Counties, 2018

### **MOTT Updates and Activities from Tony D'Agostino... December, 2019**

- Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities.
- Thank you to MOTT intern Sally Tang for publishing this month's TravelStats Newsletter.