



MOTT TravelStats Newsletter – NOVEMBER, 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

Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: October, 2019

- During the month of October, 2019, Massachusetts statewide lodging room demand (2,137.5k) decreased by 2.8% compared to October 2018 (2,199.0k). The average daily room rate decreased by 4.0% to \$205.85 from \$214.54. Occupancy rates, which reflect changes in both supply and demand for rooms decreased by 4.7 percentage points to 76.6% from 81.3%. Overall room revenue decreased 6.7% to \$440.0 mil from \$471.86 mil.

Massachusetts Hotel Lodging Data

Month of October, 2019

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions\$)
2019	2,137.5	205.85	76.6	440.0
2018	2,199.4	214.54	81.3	471.8
2017	2,053.4	204.59	78.7	420.1

- REVPAR CYTD, which is a function of occupancy rate and room rate, decreased for CYTD October over same period last year by 1.2% to \$136.6 from \$138.22. Occupancy rate decreased 2.4% and the room rate increased 1.2%.

REVPAR CYTD October, 2019

Year	(\$'s)	% Change
2019	136.6	-1.2
2018	138.22	2.6
2017	134.67	2.6

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, 2019 & FY 2020 thru October

- **For the month of October, 2019 (FY20),** the net room occupancy tax collections of \$33.6 mil increased by 12.7% from the October 2018 (FY19) collections of \$29.8 mil. The October 2018 collections were an 11.1% increase from the October 2017 (FY18) collections of \$26.9 mil.

State Room Occupancy Tax Collections

Month of October

Year	\$ (000)	% Change
FY2020	33,677.3	12.7
FY2019	29,867.0	11.1
FY2018	26,872.3	1.2

- **For FY2020 YTD October,** the net room occupancy tax collections of \$142.0 mil increased by 16.8% from the October 2018 (FY19) collections of \$121.4 mil. The October 2018 collections were a 7.2% increase from the October 2017 (FY18) collections of \$113.2 mil.

FYTD thru October

Year	\$ (000)	% Change
FY2020	141,951.8	16.8
FY2019	121,430.7	7.2
FY2018	113,234.3	1.5

Source: Mass DOR Monthly Report of Collections and Refunds

Local Option Room Occupancy Taxes: October, 2019 & FY 2020 thru October

- For the month of October 2019 (FY20), the local option room occupancy tax collections of \$27.8 mil increased by 15.5% from the October 2018 (FY19) collections of \$24.1 mil. The October 2018 collections were a 10.4% decrease from the October 2017 (FY18) collections of \$21.7 mil. (Note: MA law allows local option tax rate increases in communities).

Local Room Occupancy Tax Collections

Month of October

Year	\$ (000)	% Change
FY2020	27,808.9	15.5
FY2019	24,066.8	10.4
FY2018	21,696.6	1.3

- For FY2020 YTD October, local option room occupancy tax collections totalled \$117.2 mil, an 18.5% increase from FY2019 total of \$98.8 mil. The FY2019 collections were 7.1% more than the FY2018 collections of \$92.3 mil. (See note above).

Source: Mass DOR Monthly Report of Collections and Refunds

FYTD thru September

Year	\$ (000)	% Change
FY2020	117,229.7	18.5
FY2019	98,872.8	7.1
FY2018	92,306.7	1.5

Ma Tourism Fund (MTF) Collections thru October: FYs 2020 and 2019

- The FY2020 year to date thru October 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: October, 2019 and CYTD 2019

- Massachusetts's museum and attraction attendance decreased by 4.5% in the month of October, 2019 compared to October, 2018 (1,051,548 visitors vs 1,101,640 visitors). The total net visitor decrease was 50,092 visitors at the 75 sites reporting visitor data.

- For calendar year 2019 through October, attendance was up 0.4% to 10,724,221 from the 10,678,003 visits during the same period in CY2018, an increase of 46,218 visitors.

(Note: 75 sites reported data for October 2019)

Source: NEMA Monthly attendance report

Logan International Airport Passenger Volume: October 2019 and CYTD 2019

- In **October 2019**, the number **Domestic passenger arrivals and departures** of 3.1 mil was an increase of 2.1% from the October 2018 total of 3.0 mil.
- The CYTD 2019 through October total was 28.6 million, up 2.3% from the 28.0 mil in the same period of CYTD 2018.
- The number of **International passenger arrivals and departures** increased in October 2019 by 5.3% compared to October 2018 to 686.1 k from 651.8 k.
- The CYTD 2019 totals were up 10.5% to 7.1 mil from 6.5 mil the prior year.

Domestic Passenger Volume

October	(000)s	% Change
2019	3,075.5	2.1
2018	3,013.2	6.1
2017	2,839.0	7.7

International Passenger Volume

October	(000)s	% Change
2019	686.1	5.3
2018	651.8	12.1
2017	581.5	5.6

Domestic Passenger Volume

CYTD October	(000)s	% Change
2019	28,631.6	2.3
2018	27,988.9	7.2
2017	26,101.0	5.0

International Passenger Volume

CYTD October	(000)s	% Change
2019	7,144.6	10.5
2018	6,466.3	4.4
2017	6,196.3	10.2

Domestic Visitation to Massachusetts FY 2019:

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

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

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 September 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.

Travel Expenditures	Domestic		International		Total	
	2018		2018		2018	
	(\$ Millions)		(\$ Millions)		(\$ Millions)	
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%
Total	\$19,863.8	100.0%	\$4,292.7	100.0%	\$24,156.5	100.0%

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>
Statewide	\$19,863.8	\$4,652.6	125.4	\$810.8	\$503.8

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 Chang for publishing this month's TravelStats Newsletter.