



MOTT TravelStats Newsletter – January, 2020

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: December, 2019

- During the month of December, 2019, Massachusetts statewide lodging room demand (1,393.2k) increased by 3.1% compared to December 2018 (1,351.1k). The average daily room rate decreased by 1.8% to \$141.87 from \$144.54. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 0.2 percentage points to 53.5% from 53.3%. Overall room revenue increased 1.2% to \$197.7mil from \$195.3 mil.

Massachusetts Hotel Lodging Data

Month of December, 2019

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions\$)
2019	1,393.2	141.87	53.5	197.7
2018	1,351.1	144.54	53.3	195.3
2017	1,261.8	138.26	51.4	174.4

- REVPAR CYTD, which is a function of occupancy rate and room rate, decreased for CYTD December over same period last year by 2.3% to \$129.16 from \$132.15. Occupancy rate decreased 2.7% and the room rate increased 0.5%.

REVPAR CYTD December, 2019

Year	(\$'s)	% Change
2019	129.16	-2.3
2018	132.15	3.7
2017	127.38	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: December, 2019 & FY 2020 thru December

- **For the month of December, 2019 (FY20),** the net room occupancy tax collections of \$21.4 mil decreased by 0.5 % from the December 2018 (FY19) collections of \$21.5 mil. The December 2018 collections were a 15.9 % increase from the December 2017 (FY18) collections of \$18.5 mil.

State Room Occupancy Tax Collections

Month of December

Year	\$ (000)	% Change
FY2020	21,374.3	-0.5
FY2019	21,483.6	15.9
FY2018	18,528.0	3.9

- **For FY2020 YTD December,** the net room occupancy tax collections of \$196.2 mil increased by 11.7% from the December 2018 (FY19) collections of \$175.7 mil. The December 2018 collections were a 9.2 % increase from the December 2017 (FY18) collections of \$160.9 mil.

FYTD thru December

Year	\$ (000)	% Change
FY2020	196,163.4	11.7
FY2019	175,669.5	9.2
FY2018	160,873.6	3.1

Source: Mass DOR Monthly Report of Collections and Refunds

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

- **For the month of December, 2019 (FY20),** the local option room occupancy tax collections of \$17.4 mil increased by 0.02% from the December 2018 (FY19) collections of \$17.4 mil. The December 2018 collections were a 18.1% increase from the December 2017 (FY18) collections of \$14.7 mil. (Note: MA law allows local option tax rate increases in communities).

Local Room Occupancy Tax Collections

Month of December

Year	\$ (000)	% Change
FY2020	17,419.9	0.02
FY2019	17,415.9	18.1
FY2018	14,737.8	4.1

- **For FY2020 YTD December,** local option room occupancy tax collections totalled \$161.7 mil, a 13.2% increase from FY2019 total of \$142.7 mil. The FY2019 collections were 9.4% more than the FY2018 collections of \$130.4 mil. (See note above).

FYTD thru December

Year	\$ (000)	% Change
FY2020	161,682.8	13.2
FY2019	142,745.9	9.4
FY2018	130,413.6	2.9

Source: Mass DOR Monthly Report of Collections and Refunds

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

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

- Massachusetts's museum and attraction attendance decreased by 11.1% in the month of December, 2019 compared to December, 2018 (728,699 visitors vs 819,466 visitors). The total net visitor decrease was 90,767 visitors at the 75 sites reporting visitor data.

- For calendar year 2019 through December, attendance was down to 0.6% to 12,244,720 from the 12,323,501 visits during the same period in CY2018, a decrease of 78,781 visitors.

(Note: 75 sites reported data for December 2019)

Source: NEMA Monthly attendance report

Logan International Airport Passenger Volume: December 2019 and CYTD 2019

- In **December 2019**, the number **Domestic passenger arrivals and departures** of 2.76 mil was an increase of 10.1% from the December 2018 total of 2.51 mil.
- The CYTD 2019 through December total was 34.1 million, up 2.6% from the 33.2 mil in the same period of CYTD 2018.
- The number of **International passenger arrivals and departures** increased in December 2019 by 7.5% compared to December 2018 to 621.3 k from 578.0 k.
- The CYTD 2019 totals were up 9.7% to 8.3 mil from 7.6 mil the prior year.

Domestic Passenger Volume

December	(000)s	% Change
2019	2,762.0	10.1
2018	2,509.4	4.4
2017	2,403.8	5.5

International Passenger Volume

December	(000)s	% Change
2019	621.3	7.5
2018	578.0	11.2
2017	519.9	1.7

Domestic Passenger Volume

CYTD December	(000)s	% Change
2019	34,098.8	2.6
2018	33,245.9	6.9
2017	31,101.0	5.1

International Passenger Volume

CYTD December	(000)s	% Change
2019	8,318.0	9.7
2018	7,583.9	5.3
2017	7,199.6	9.3

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 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.

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... January, 2020

- 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.