



**MOTT TravelStats Newsletter -August 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](mailto:Tony.Dagostino@state.ma.us).

**Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: July 2011**

- During the month of July 2011, Massachusetts statewide lodging room demand (1,955.0 k) increased 5.0% compared to July 2010 (1,861.0 k). The average daily room rate between these two periods increased by 3.3% to \$149.60 from \$144.83. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 5.2 percentage points to 79.0% from 75.1%. Overall room revenue increased by 8.5% to \$292.4 mil from \$269.5 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD July over same period last year by 8.6% to \$85.84 from \$79.06. Occupancy was up 5.0% and the room rate increased 3.4%.

**Massachusetts Hotel Lodging Data**

Month of July

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2011	1,955.0	149.60	79.0	292.4
2010	1,861.0	144.83	75.1	269.5
2009	1,737.0	142.46	70.0	247.4

REVPAR- Calendar Year 2011, thru July

Year	(\$'s)	% Change
2011	85.84	8.6
2010	79.06	11.1
2009	71.17	-17.2

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

**State Room Occupancy Taxes: July 2011 & Fiscal Year 2012**

- For the month of July 2011 (FY12), the net room occupancy tax collections of \$18.5 million increased by 13.5% from the July 2010 (FY11) collections of \$16.3 million. The July 2010 collections were a 14.1% increase from the July 2009 (FY10) collections of \$14.3 million.
- For FY2012 YTD net room occupancy tax collections totalled \$18.5 million, a 13.5% increase from FY11. The FY11 collections of \$16.3 million were 14.1% more than the FY10 collections of \$14.3 million.

**State Room Occupancy Tax Collections**

Month of July

Year	\$ (000)	% Change
FY2012	18,486.1	13.5
FY2011	16,282.2	14.1
FY2010	14,265.0	-20.0

FYTD thru July

Year	\$ (000)	% Change
FY2012	18,486.1	13.5
FY2011	16,282.2	14.1
FY2010	14,265.0	-20.0

Source: Mass DOR Monthly Report of Collections and Refunds.

**Local Option Room Occupancy Taxes: July 2011 & Fiscal Year 2012**

- For the month of **July 2011 (FY12)**, the local option room occupancy tax collections of \$14.6 million increased 17.6% from the July 2010 (FY11) collections of \$12.5 million. The July 2010 collections were a 57.7% increase from the July 2009 (FY10) collections of \$7.9 million (note: new law allowed local option tax rate increases in communities).
- **For FY2012 YTD**, local option room occupancy tax collections totalled \$14.6 million, a 17.6% increase from FY11. (See note above). The FY11 collections of \$12.5 million were a 57.7% increase over the the FY10 collections of \$7.90 million.

Source: Mass DOR Monthly Report of Collections and Refunds

**Local Room Occupancy Tax Collections**

Month of July

Year	\$ (000)	% Change
FY2012	14,645.6	17.6
FY2011	12,458.0	57.7
FY2010	7,899.0	-20.4

FYTD thru July

Year	\$ (000)	% Change
FY2012	14,645.6	17.6
FY2011	12,458.0	57.7
FY2010	7,899.0	-20.4

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

The July FYTD2012 MTF collections totaled \$4.3 million which was a 13.1% increase from the \$3.8 million collected during the same period in FY2011.

Source: Mass DOR Monthly Report of Collections and Refunds

**Museum and Attraction Attendance: July 2011 and CYTD 2011**

Massachusetts' museum and attraction attendance increased 5.8% in the month of July 2011 compared to July 2010 (1,631,091 vs. 1,541,077 visitors). The total net visitor increase was 90,014 at the 57 institutions reporting visitor data.

For calendar year 2011 thru July attendance is up 4.3% to 7,132,725 from the 6,840,557 during the same period in CY2010, an increase of 292,168 visitors.

(Source: Museum of Science Monthly attendance report)

**Logan International Airport Passenger Volume: July 2011**

- In **July 2011**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.4 million, an increase of 6.3% from the July 2010 total of 2.2 million. The CYTD2011 thru July total was 14.4 million, up 7.6% from the 13.4 million last year.
  
- The number of **international passenger** arrivals and departures increased in July 2011 by 11.2% compared to July 2010 to 446 k from 401 k. The CYTD thru July totals were up 6.3% to 2,245 k from 2,111 k last year.

**Domestic Passenger Volume**

July	(000)s	% Change
2011	2,384	6.3
2010	2,243	6.4
2009	2,108	1.6

**International Passenger Volume**

July	(000)s	% Change
2011	446	11.2
2010	401	1.1
2009	367	-5.7

**Domestic Passenger Volume**

CYTD July	(000)s	% Change
2011	14,397	7.6
2010	13,376	7.9
2009	12,400	-6.0

**International Passenger Volume**

CYTD July	(000)s	% Change
2011	2,245	6.3
2010	2,111	-1.8
2009	2,150	-10.3

Source: MASSPORT



## **Domestic Visitation to Massachusetts FY2010:**

Domestic visitors' origin, number of trips (visits) and percentage of total trips.

<b><u>Origin State</u></b>	<b><u>Person trips</u></b>	<b><u>Share of all trips</u></b>
Massachusetts	4,942,000	29.7%
New York	2,381,000	14.3%
Connecticut	1,557,000	9.3%
New Hampshire	820,500	4.9%
Rhode Island	700,000	4.2%
California	526,000	3.2%
Florida	578,000	3.5%
New Jersey	771,000	4.6%
Maine	688,000	4.1%
Virginia	197,000	1.2%
Pennsylvania	564,500	3.4%
Vermont	448,500	2.7%
<b>Sub Total</b>	<b>14,173,500</b>	<b>85.1%</b>
All Other States	2,481,500	14.9%
All New England States	9,157,000	55.0%
All Mid Atlantic States	3,217,000	22.3%

Source: TNS, Travels America, FY2010

The total domestic trips to Massachusetts in FY2010 were 16.1 million. The primary trip purpose in FY2010 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](http://massvacation.com) for more details.

Source: TNS, Travels America, FY2010

## International Visitors to MA & U.S. Calendar Year 2010 & July 2011

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u>  MA share of Market in 2010	<u>Visitors to U.S.</u>  CYTD 2011 thru July
	2010 Visitors (000s)	Change from 2009		
<b>ALL OVERSEAS</b>	<b>1,292</b>	<b>2.6%</b>	<b>4.9%</b>	<b>6.2%</b>
<b>WESTERN EUROPE</b>	<b>614</b>	<b>-5.2%</b>	<b>5.4%</b>	<b>7.3%</b>
<b>Canada</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>6.4%</b>
<b>United Kingdom</b>	<b>189</b>	<b>1.1%</b>	<b>4.9%</b>	<b>1.9%</b>
<b>Germany</b>	<b>121</b>	<b>10.0%</b>	<b>7.0%</b>	<b>5.7%</b>
<b>Japan</b>	<b>71</b>	<b>86.8%</b>	<b>2.1%</b>	<b>-7.1%</b>
<b>Ireland</b>	<b>21</b>	<b>-41.7%</b>	<b>5.8%</b>	<b>-2.9%</b>
<b>France</b>	<b>70</b>	<b>7.7%</b>	<b>5.2%</b>	<b>17.5%</b>
<b>Italy</b>	<b>41</b>	<b>-19.6%</b>	<b>4.9%</b>	<b>9.8%</b>
<b>Netherlands</b>	<b>35</b>	<b>-22.2%</b>	<b>6.2%</b>	<b>6.3%</b>
<b>Brazil</b>	<b>54</b>	<b>-5.3%</b>	<b>4.5%</b>	<b>26.8%</b>
<b>Spain</b>	<b>30</b>	<b>42.9%</b>	<b>4.7%</b>	<b>9.8%</b>
<b>Argentina</b>	<b>19</b>	<b>-5.0%</b>	<b>4.4%</b>	<b>16.4%</b>

### 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 five origin countries to visit MA have been Canada, the United Kingdom, Germany, France and Italy.

### Massachusetts market share of Overseas for CY2010 and Canadian visitation for CY2009

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 645 k in CY2009.

### Travel to U.S. from MOTT target markets for CYTD 2011 thru July

Travel to U.S. for CYTD thru July from Canada, which is Massachusetts number one international visitor origin market, was up 6.4%. Visits to U.S. from Western Europe were up 7.3% while all Overseas visitation was up 6.2%.



## 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%
<b>Total</b>	<b>\$13,475.0</b>	<b>100%</b>	<b>\$2,054.9</b>	<b>100%</b>	<b>\$15,530.9</b>	<b>100%</b>

### 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
<b>Statewide</b>	<b>\$13,474.99</b>	<b>\$2,992.62</b>	<b>104.73</b>	<b>\$538.88</b>	<b>\$339.88</b>

Source: USTA Economic Impact of Travel on MA Counties, 2010



### **MASSVACATION.COM Activity: August 2011 and First 6 months CY2011**

The **MASSVACATION.COM** site had **91,011 visits** in August 2011 **up 2.9%** from the 88,448 in August 2010. Additionally, there were **401,390 page views**, **down 10.9%** from the 450,529 the prior August. The **average time on the site went down 15.6%** to **3 minute 20 seconds**. The most visited page, **Find Lodging**, had 13,091 views. **Visits originating** in the U.S. **increased by 3.0%** to **77,529**. Visits from Canada decreased 3.2% to 4,718 and Visits from the U.K. increased 17.1% to 1,969.

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) data: August 2011 and First 6 months CY2011**

The Community Marketing, Inc. 13<sup>th</sup> Annual LGBT Tourism Study found that **Boston** ranked **9<sup>th</sup>** 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 August 2011, there were **5,198** visits and **12,109** page views. During the first six months of 2011 there were **44,986** visits and **106,197** page views.

The top five information pages viewed in August were **westmass, bostonmass, capemass, centmass and northmass**.

(Source: CMI and MOTT)

### **MOTT Updates and Activities from Tony D'Agostino August 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.