



MOTT TravelStats Newsletter -February 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.

Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: January 2011

- During the month of January 2011, Massachusetts statewide lodging room demand (1,013.1k) increased 0.8% compared to January 2010 (1,004.6k). The average daily room rate between these two periods increased by 2.5% to \$111.58 from \$108.81. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 1.0 percentage points to 44.6% from 43.6%. Overall room revenue increased by 3.4% to \$113.0 mil from \$109.3 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD January over same period last year by 4.9% to \$49.71 from \$47.41. Occupancy was up 2.3% and the room rate increased 2.5%.

Massachusetts Hotel Lodging Data

Month of January

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2011	1,013.1	111.58	44.6	113.0
2010	1,004.6	108.81	43.6	109.3
2009	883.8	113.35	38.4	100.2

REVPAR- Calendar Year 2011, thru January

Year	(\$'s)	% Change
2011	49.71	4.9
2010	47.41	8.8
2009	43.58	-16.9

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

State Room Occupancy Taxes: January 2011 & Fiscal Year 2011

- For the month of January 2011 (FY11), the net room occupancy tax collections of \$8.6 million increased by 17.3% from the January 2010 (FY10) collections of \$7.4 million. The January 2010 collections were a 16.4 % decrease from the January 2009 (FY09) collections of \$8.8 million.
- For FY2011 YTD net room occupancy tax collections totalled \$110.2 million, a 11.5% increase from FY10. The FY10 collections of \$98.8 million were 12.5 % less than the FY09 collections of \$112.9 million.

State Room Occupancy Tax Collections

Month of January

Year	\$ (000)	% Change
FY2011	8,638.1	17.3
FY2010	7,360.7	-16.4
FY2009	8,806.1	-4.5

FYTD Thru January

Year	\$ (000)	% Change
FY2011	110,161.2	11.5
FY2010	98,775.9	-12.5
FY2009	112,898.2	-2.4

Source: Mass DOR Monthly Report of Collections and Refunds

Local Option Room Occupancy Taxes: January 2011 & Fiscal Year 2011

- For the month of January 2011 (FY11), the local option room occupancy tax collections of \$6.8 million increased 25.7% (note: new law allowed local option tax rate increases in communities) from the January 2010 (FY10) collections of \$5.4 million. The January 2010 collections were a 9.8% increase from the January 2009 (FY09) collections of \$4.9 million.

- For FY2011 YTD, local option room occupancy tax collections totalled \$86.5 million, a 40.2% increase from FY10. (See note above). The FY10 collections of \$61.7 million were 3% less than the FY09 collections of \$63.6 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of January

Year	\$ (000)	% Change
FY2011	6,798.8	25.7
FY2010	5,408.5	9.8
FY2009	4,925.6	-5.7

FYTD thru January

Year	\$ (000)	% Change
FY2011	86,467.0	40.2
FY2010	61,693.8	-3.0
FY2009	63,614.2	-2.1

Ma Tourism Fund (MTF) Collections, thru January: FYs 2011, 2010, & 2009

The January 2011(FY2011) MTF collections totaled \$25.9 million which was a 9.6% increase from the \$23.7 million collected during the same period in FY2010. The FY2010 collections were 13.4% less than the FY2009 collections of \$27.3 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: January 2011 and CYTD 2010

Massachusetts' museum and attraction attendance decreased 16.5% in the month of January 2011 compared to January 2010 (503,717 visitors vs. 602,918 visitors). The total net visitor decrease was 99,201 at the 60 institutions reporting visitor data.

For calendar year 2011 thru January attendance is down 16.5% to 503,717 from the 602,918 during the same period in CY2010, a decrease of 99,201 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: January 2011

- In **January** 2011, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.64 million, an increase of 5.8% from the January 2010 total of just 1.55 million. The CYTD2011 thru January total was 1.64 million, up 5.8% from the 1.55 million last year.

- The number of **international passenger** arrivals and departures decreased in January 2011 by 9.8% compared to January 2010 to 217 k from 240 k. The CYTD thru January totals were down 9.8% to 217 k from 240 k last year.

Domestic Passenger Volume

January	(000)s	% Change
2011	1,645	5.8
2010	1,554	13.1
2009	1,374	-11.0

International Passenger Volume

January	(000)s	% Change
2011	217	-9.8
2010	240	-0.3
2009	241	-13.7

Domestic Passenger Volume

CYTD January	(000)s	% Change
2011	1,645	5.8
2010	1,554	13.1
2009	1,374	-11.0

International Passenger Volume

CYTD January	(000)s	% Change
2011	217	-9.8
2010	240	-0.3
2009	241	-13.7

Source: MASSPORT



Domestic Visitation to Massachusetts FY2010:

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

<u>Origin State</u>	<u>Person trips</u>	<u>Share of all trips</u>
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%
Sub Total	14,173,500	85.1%
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 for more details.

Source:TNS, Travels America, FY2010

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

	Visitors to Massachusetts		Visitors to Massachusetts	Visitors to U.S.
	2010 Visitors	Change from 2009	MA share of Market in 2010	CYTD 2011 thru January
	(000s)			
ALL OVERSEAS	1,292	2.6%	4.9%	9.2%
WESTERN EUROPE	614	-5.2%	5.4%	3.2%
Canada	n/a	n/a	n/a	5.7%
United Kingdom	189	1.1%	4.9%	2.0%
Germany	121	10.0%	7.0%	-2.6%
Japan	71	86.8%	2.1%	4.1%
Ireland	21	-41.7%	5.8%	n/a%
France	70	7.7%	5.2%	19.2%
Italy	41	-19.6%	4.9%	8.8%
Netherlands	35	-22.2%	6.2%	3.4%
Brazil	54	-5.3%	4.5%	27.8%
Spain	30	42.9%	4.7%	9.7%
Argentina	19	-5.0%	4.4%	19.2%

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 January CY 2011

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 5.7 in January, visits from western Europe were up 3.2% while all Overseas visitation was up 9.2%.



Direct Economic Impact of Travel and Tourism, CY2009

Domestic and International traveler expenditures totaled \$14.4 billion in MA during 2009, down 7.8% from 2008. Domestic traveler spending decreased 8.3% while international traveler spending decreased 5.1%. Total expenditures generated \$962.7 million in state and local taxes for MA.

<i>2009 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$3,893.3	\$237.8	\$4131.1
Auto Transportation	1,811.9	26.6	1,838.4
Lodging	2,467.5	628.0	3,095.5
Foodservice	2,601.6	379.3	2,980.9
Entertainment & Recreation	791.2	164.0	955.2
General Retail Trade	853.7	497.8	1,351.5
2009 Totals	\$12,419.2	\$1,933.5	\$14,352.6

Impact of Domestic Travel on MA Counties, 2009

<u>County</u>	Expenditures	Payroll	Employment	State Tax	Local Tax
	(\$ Millions)	(\$ Millions)	(Thousands)	Receipts (\$ Millions)	Receipts (\$ Millions)
Barnstable	\$785.18	\$212.46	8.53	\$33.20	\$45.51
Berkshire	308.96	84.87	3.49	15.50	8.28
Bristol	361.50	79.45	2.92	19.37	6.84
Dukes	104.81	27.78	1.14	4.02	5.94
Essex	634.88	156.99	6.00	34.03	16.08
Franklin	47.26	9.53	0.35	2.69	1.50
Hampden	419.55	92.93	3.17	23.24	8.04
Hampshire	96.16	22.49	0.83	5.22	2.55
Middlesex	1,856.80	520.51	19.21	102.06	47.91
Nantucket	136.85	29.52	0.99	3.99	4.60
Norfolk	791.57	256.65	9.06	42.51	16.81
Plymouth	446.49	95.55	3.61	21.89	19.86
Suffolk	5,781.23	1,206.95	39.83	152.68	103.91
Worcester	647.93	133.81	5.22	34.80	14.01
Statewide	\$12,419.16	\$2,929.50	104.35	\$495.20	\$301.84

Source: USTA Economic Impact of Travel on MA Counties, 2009



MASSVACATION.COM Activity: February 2011 and CYTD 2011 thru February

The **MASSVACATION.COM** site had **148,289 visits** in February **2011** up 150.5% from the 59,206 in February 2010. Additionally, there were **415,101 page views**, up 35.6% from the **306,060** the prior February. The average time on the site went down 61.8% to **1 minute 23 seconds**. The most visited page, **Winterfun (a new page)**, had 139,345 views. **Visits** originating in the U.S. increased by 173% to 136,835. Visits from Canada increased 37% to 3,243 and Visits from the U.K. decreased 5.5% to 1,519.

For **CYTD 2011 thru February** the total **visits** were **202,426 up 83.4% from the 110,388 in CY2010** and the **page views** were **up 11.2% to 654,775** from 589,032. The average time on the **site was 1 minutes 54 seconds** (down 49%). The **United States** generated the most website visits with **181,430** (up 98%). **Canada** followed with **5,591** (up 19%) and the **United Kingdom** was third with **3,072**(down 8%). The **Winterfun (144k)** and **Find Lodging (20k)** pages had the most views. The top region page was Valuepass/greaterboston with **14k**.

Source: MOTT- (Google Analytics)

Lesbian Gay Bisexual Transgender (LGBT) data: February 2011 & CYTD thru February

The Community Marketing, Inc. 13th Annual LGBT Tourism Study found that **Boston** ranked **9th** 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 February 2011 there were 5,739 visits and 15,450 page views. Calendar Year to date thru February there have been 13,502 visits and 39,120 page views.

The top five information pages viewed were wedding, capemass, bostonmass, westmass, and contest.

(Source: CMI and MOTT)

MOTT Updates and Activities from Tony D'Agostino: February 2011

Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities.