



MOTT TravelStats Newsletter -January 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: December 2010

- During the month of December 2010, Massachusetts statewide lodging room demand (1,003.2k) increased 5.4% compared to December 2009 (952.1k). The average daily room rate between these two periods increased by 2.1% to \$111.61 from \$109.31. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 2.8 percentage points to 43.9 from 41.1 percent. Overall room revenue increased 7.6% to \$112.0 mil from \$104.1 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD December over same period last year by 11.4% to \$83.83 from \$75.24. Occupancy was up 9.2% and the room rate increased 2.1%.

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

Massachusetts Hotel Lodging Data

Month of December

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2010	1,003.2	111.61	43.9	112.0
2009	952.1	109.31	41.1	104.1
2008	994.1	115.04	43.4	114.4

REVPAR- Calendar Year 2010, thru December

Year	(\$'s)	% Change
2010	83.83	11.4
2009	75.24	-14.7
2008	88.18	0.5

State Room Occupancy Taxes: December 2010 & FY 2011 thru December

- For the month of December 2010 (FY11), the net room occupancy tax collections of \$12.1 million increased by 14.0% from the December 2009 (FY10) collections of \$10.6 million. The December 2009 collections were a 13.9% decrease from the December 2008 (FY09) collections of \$12.3 million.
- For FY2011 YTD net room occupancy tax collections totalled \$101.5 million, an 11.1% increase from FY10. The FY10 collections of \$91.4 million were 12.2 % less than the FY09 collections of \$104.1 million.

Source: Mass DOR Monthly Report of Collections and Refunds

State Room Occupancy Tax Collections

Month of December

Year	\$ (000)	% Change
FY2011	12,111.1	14.0
FY2010	10,621.5	-13.9
FY2009	12,330.8	-12.2

FYTD Thru December

Year	\$ (000)	% Change
FY2011	101,523.1	11.1
FY2010	91,415.3	-12.2
FY2009	104,092.1	-2.2



Local Option Room Occupancy Taxes: December 2010 & FY 2011 thru December

- For the month of October 2010 (FY11), the local option room occupancy tax collections of \$9.4 million increased by 21.3% (note: new law allowed local option tax rate increases in communities) from the December 2009 (FY10) collections of \$7.8 million. The December 2009 collections were a 16.0% increase from the December 2008 (FY09) collections of \$6.7 million.
- For FY2011 YTD, local option room occupancy tax collections totalled \$79.7 million, a 41.5% increase from FY10. (See note above) The FY10 collections of \$56.3 million were 4.1 % less than the FY09 collections of \$58.7 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of December

Year	\$ (000)	% Change
FY2011	9,418.1	21.3
FY2010	7,763.0	16.0
FY2009	6,693.9	-10.9

FYTD thru December

Year	\$ (000)	% Change
FY2011	79,668.1	41.5
FY2010	56,285.3	-4.1
FY2009	58,688.6	-1.8

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

The FY2011 year to date thru December 2010 MTF collections totaled \$24.0 million which was a 9.2% increase from the \$22.0 million collected during the same period in FY2010. The FY2010 collections were 12.7% less than the FY2009 collections of \$25.2 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: December 2010 and CYTD 2010

Massachusetts' museum and attraction attendance increased 4.3% in the month of December 2010 compared to December 2009 (581,000 visitors v. 556,970 visitors). The total net visitor increase was 24,030 at the 59 institutions reporting visitor data.

For calendar year 2010 attendance is up 0.9% to 11,726,205 from the 11,623,630 attendees in CY2009, an increase of 102,575 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: December 2010 and CY 2010

- In **December** 2010, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled just over 1.8 million, an increase of 7.2% from the December 2009 total of just under 1.7 million. The CY2010 total was 23.7 million, up 8.8% from the 21.8 million in CY2009.

- The number of **international passenger** arrivals and departures decreased in December 2010 by 10.0% compared to December 2009 to 232k from 257k. The CY2010 totals were down 0.4% to 3.68 million from 3.70 million in CY2009.

Domestic Passenger Volume

December	(000)s	% Change
2010	1,820	7.2
2009	1,698	5.8
2008	1,604	-3.3

International Passenger Volume

December	(000)s	% Change
2010	232	-10.0
2009	257	0.1
2008	257	-12.2

Domestic Passenger Volume

Calendar Year	(000)s	% Change
2010	23,688	8.8
2009	21,767	-1.2
2008	22,032	-7.6

International Passenger Volume

Calendar Year	(000)s	% Change
2010	3,682	-0.4
2009	3,696	-7.1
2008	3,977	-4.2

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 and U.S. in Calendar Year 2010

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u> MA share of Market in 2010	<u>Visitors to the U.S.</u> CY2010 v. CY2009
	2010 Visitors (000s)	CY10 v. CY09 Change		
	ALL OVERSEAS	1,292	2.6%	4.9%
WESTERN EUROPE	614	-5.2%	5.4%	3.6%
Canada	n/a	n/a	n/a	11.0%
United Kingdom	189	1.1%	4.9%	-1.2%
Germany	121	10.0%	7.0%	2.3%
Japan	71	86.8%	2.1%	16.0%
Ireland	21	-41.7%	5.8%	-12.0%
France	70	7.7%	5.2%	11.4%
Italy	41	-19.6%	4.9%	11.3%
Netherlands	35	-22.2%	6.2%	4.1%
Brazil	54	-5.3%	4.5%	34.2%
Spain	30	42.9%	4.7%	7.2%
Argentina	19	-5.0%	4.4%	22.4%

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 and Canadian visitation for CY2010

For CY2010, Massachusetts captured 4.9% of all Overseas travel to the U.S., down from a 5.3% market share in CY2009. Market share of visitation from Canada to MA was 3.4% in CY2009. The CY2010 visits to MA data are not yet available.

Travel to U.S. from MOTT target markets for CY 2010

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 11.0 in CY 2010, visits from western Europe were up 3.6% while all Overseas visitation was up 11.0%.



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	Receipts
				(\$ Millions)	(\$ 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: January 2011 and Calendar Year 2010

The **MASSVACATION.COM** site had 54,137 **visits** in **January of 2011**, up 5.8% from the 51,182 in January, 2010. Additionally, there were **239,674 page views**, down 15% from the **282,972** the prior January. The average time on the site went down 14% to **3 minutes 19 seconds**. The most visited page, Find Lodging, had 9,950 views. **Visits** originating in the U.S. increased by 7.7% to 44,595. Visits from Canada increased 0.3% to 2,348 and Visits from the U.K. decreased 9.7% to 1,553. Visits originating in Germany decreased 4.7% to 794.

For **CY2010** the total **visits** were **952,880 down 3% from the 985,965 in CY2009** and the **pageviews were down 18% to 4.5M from 5.4M**. The average time on the site was **3 minutes 31 seconds** (down 13%). The **United States** generated the most website visits with **822,775** (down 3%). **Canada** followed with **42,754** (up 3%) and the **United Kingdom** was third with **17,061**(down 6%). The **Find Lodging (147k), Fall Foliage (108k) and 50 under 50\$ (104k)** page had the most view in 2010. The top region page was **Cape Cod and the Islands** with **97k**.

Source: MOTT- (Google Analytics)

Lesbian Gay Bisexual Transgender (LGBT) data: January 2011 & Calendar Year 2010

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 January 2011 there were 7,763 visits and 23,670 page views. For Calendar Year 2010, there were 80,618 visits and 186,890 page views.

The top information pages viewed were blog, contest, iphone xdirectory, capemass, bostonmass, westmass, and centmass.

(Source: CMI and MOTT)

MOTT Updates and Activities from Tony D'Agostino: 2010

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