



Office of Travel & Tourism

massvacation.com

MOTT TravelStats Newsletter - July 2009

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: June 2009

- During the month of June 2009, Massachusetts state wide lodging room demand (1,550k) decreased 8.9% compared to June 2008 (1,701k). The average daily room rate between these two periods decreased by 10.7% to \$135.77 from \$152.07. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 7.2 percentage points to 64.2% from 71.4%. Overall room revenue decreased 18.7% to \$210.4 mil from \$258.7 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CYTD 2009 over same period in CY2008 by 18.9% to \$65.73 from \$81.02. Occupancy was down 11.0% and the room rate decreased by 8.8%.

Massachusetts Hotel Lodging Data

Month of June

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	1,550	135.77	64.2	210.4
2008	1,701	152.07	71.4	258.7
2007	1,720	143.78	73.5	247.3

REVPAR- Calendar Year 2009 thru June

Year	(\$'s)	% Change
2009	65.73	-18.9
2008	81.02	6.0
2007	76.43	3.3

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

Room Occupancy Taxes: June 2009 (Fiscal Year 2009)

- For the month of June 2009 (FY09), the net room occupancy tax collections of \$13.97 million decreased by 11.2% from the June 2008 (FY08) collections of \$15.73 million. The June 2008 collections were a 2.4% increase over the June 2007 (FY07) collections of \$15.36 million.
- For the completed Fiscal Year 2009 (July 2008 thru June 2009), net room occupancy tax collections totalled \$160.9 million, a 7.6% decrease from the same period of FY08. The FY08 collections of \$174.2 million were 10.6% more than the FY07 collections of \$157.5 million.

Total Room Occupancy Tax Collections

Month of June

Year	\$ (000)	% Change
FY2009	13,972	-11.2
FY2008	15,732	2.4
FY2007	15,362	4.7

Fiscal Year (FY) 2009

Year	\$ (000)	% Change
FY2009	160,933	-7.6
FY2008	174,157	10.6
FY2007	157,515	8.8

Source: Mass DOR Monthly Report of Collections and Refunds

Ma Tourism Fund (MTF) Collections: Fiscal Year 2009 (FY2009)

The final FY2009 Massachusetts Tourism Fund collections were not included in the June 2009 MA DOR report. The final FY2008 collections totaled \$41.7 million. The FY2008 collections were 7.2% higher than the FY2007 collections (\$41.7 million v. \$38.9 million).

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: June 2009 and CYTD 2009

Massachusetts' museum and attraction attendance decreased 0.6% in the month of June 2009 compared to June 2008 (1,355,230 visitors v. 1,363,304 visitors). The total net visitor decrease was 8,074 at the 59 institutions reporting visitor data.

For all of calendar year 2009 thru June attendance was up 1.1% to 5.5 million from the 5.5 million attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: June 2009

- In **June 2009**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.9 million, a decrease of 3.7% from the June 2008 total of 2.0 million. Calendar year to date thru June the total was 10.3 million down 7.5%.
- The number of **international passenger** arrivals and departures decreased in June 2009 by 7.9% compared to June 2008 to 356k from 387k. Calendar year to date totals thru June are down 11.3% to 1,754,659 from 1,978,395.

Domestic Passenger Volume

June	(000)s	% Change
2009	1,943	-3.7
2008	2,018	-7.4
2007	2,179	4.2

International Passenger Volume

June	(000)s	% Change
2009	356	-7.9
2008	387	-3.2
2007	399	4.5

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	10,292	-7.5
2008	11,123	-5.8
2007	11,809	2.0

International Passenger Volume

CYTD	(000)s	% Change
2009	1,755	-11.3
2008	1,978	0.6
2007	1,967	-2.0

(Source: Massport)

Domestic Visitation to Massachusetts FY2008:

Domestic Visitors Origin: Top 10 States, FY2008

<u>Origin</u>	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	6,733,000	34.7%
New York	2,500,000	12.9%
Connecticut	1,997,000	10.3%
New Hampshire	1,022,000	5.3%
Rhode Island	800,000	4.1%
California	631,000	3.3%
Florida	626,000	3.2%
New Jersey	575,000	3.0%
Maine	525,000	2.7%
Virginia	401,000	2.1%
Pennsylvania	386,000	2.0%
Vermont	380,000	2.0%
All Other States	2,803,000	14.5%
All New England States	11,457,000	59.1%
All Mid Atlantic States	3,461,000	17.9%

There was a 3.8% increase in domestic visitation to MA in FY2008 compared to FY2007. The primary trip purpose in FY2008 was visiting friends and/or relatives, the top activity was attending a family/social event, and 66% of visitors arrived in their own vehicle. Of the visitors that stayed overnight, 47% stayed in a hotel/motel/inn or B&B.

International Visitors to Massachusetts in CY2008 and to U.S. in CY2009

	Visitors to Massachusetts		Change in visitors to U.S. in CY09 thru May
	2008 Visitors	2008 SHARE of MARKET	
	(000s)		
ALL OVERSEAS	1,267	5.0%	-13.6%
WESTERN EUROPE	720	5.9%	-9.5%
Canada	N/A	N/A	-8.3%
United Kingdom	237	5.2%	-19.4%
Germany	123	6.9%	-7.5%
Japan	62	1.9%	-13.9%
Ireland	52	9.7%	-17.8%
France	57	4.6%	1.1%
Italy	58	7.5%	-1.7%
Netherlands	33	5.4%	-12.4%
Brazil	45	5.9%	6.6%
Spain	32	4.9%	-8.1%
Argentina	16	5.1%	9.1%

Travel to Massachusetts from MOTT target markets in CY02008

Estimated OVERSEAS visits to Massachusetts during **CY2008** was just under **1.3 million**. This was a 8.2% increase over the **CY2007** estimate of **1.2 million**.

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

All travel to U.S. from MOTT target markets CYTD thru May 2009

For CY 2009 through May 2009, visitation from Canada to U.S. dropped 8.3%, while WE visits declined 9.5% compared to same period in CY 2008.

Source: Dept of Commerce, OTTI

Please see the chart below for domestic and international spending data in MA for **CY2008**.

Direct Economic Impact of Travel and Tourism, CY2007

Domestic and International travelers directly spent over \$15.1 billion in MA during 2007, up 6.6% from 2006. Domestic traveler spending increased 6% while international traveler spending increased 11.1%. Total expenditures generated \$943.5 million in state and local taxes for MA.

<i>2007 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$4,392.9	\$231.9	\$4,624.8
Auto Transportation	1,908.7	24.6	1,933.3
Lodging	2,856.6	641.9	3,498.5
Foodservice	2,548.3	327.7	2,876.0
Entertainment & Recreation	769.4	148.6	918.0
General Retail Trade	870.5	423.4	1,293.9
2007 Totals	\$13,346.5	\$1,798.1	\$15,144.6

Direct travel expenditures in the U.S. in CY2007 totaled \$700 billion.

A traveler is defined as one who travels more than 50 miles from home one way to a destination or who stays at a destination overnight.

(Source: TIA, The Economic Impact of Travel on Massachusetts Counties, 2007)

MASSVACATION.COM Activity: July 2009 & CYTD Thru July 2009

The MASSVACATION.COM site had **129,704 unique visits** in July 2009, up 16% from 111,732 in July 2008. Additionally, there were **746,659** page views in July, up 4% from the **718,317** in 2008. The average time on the site was up down 4% to **4 minutes 27 seconds**.

For CY2009 through July 2009, the total **visits** were **650,134 (down 9% from same time period in 2008)** and the **page views** were **3.8 million (down 5%)**. The average time on the site was **4 minutes 16 seconds (up 14%)**.

The United States generated the most website visits with **566,163 (down 12%)**. Canada followed with **28,730 (up 13%)** and the United Kingdom was third with **10,955 (up 4%)**.

The **Mass Value Pass** page had the most visits for CY2009 through July 2009 with **411,822**. The top three region pages were Cape Cod (88,903 views), Greater Boston (86,195), and Western Mass (77,248).

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Distribution: July 2009

The total number of **2009 Getaway Guides** distributed in **July** was **41,923**. Of these, **10,960** were **individual requests from FARM** (the online fulfillment system). Most of the remaining guides were sent to major information centers across the state (22,200), hotels and motels (550), and 3,150 were sent to AAA info centers.

(Source: FARM Monthly Report & MOTT Fulfillment Dept.)

Lesbian Gay Bisexual Transgender (LGBT): July 2009

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%)** by the LGBT community.

The **LGBT micro site** was launched on January 23 and the site utilization has been fantastic. Since inception thru July 2009 there have been 40,000 visits and over 102,000 page views.

The top five information pages viewed were capemass, marriage, bostonmass, westmass, and southmass.

MOTT Updates and Activities from Tony D'Agostino: August 2009

Please note that the 2008 Tourism Industry Report is now on the website Research page.

A revised June TravelStats has been posted on the Research Page of massvacation.com.