



MOTT TravelStats Newsletter -JUNE 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: May 2011

- During the month of May 2011, Massachusetts statewide lodging room demand (1,682.8k) increased 1.9% compared to May 2010 (1,651.9k). The average daily room rate between these two periods increased by 3.2% to \$143.62 from \$139.20. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 1.5 percentage points to 68.3% from 66.8%. Overall room revenue increased by 5.1% to \$241.7 mil from \$229.9 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD May over same period last year by 7.1% to \$73.13 from \$68.31. Occupancy was up 4.3% and the room rate increased 2.6%.

Massachusetts Hotel Lodging Data

Month of May

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2011	1,682.8	143.62	68.3	241.7
2010	1,651.9	139.20	66.8	229.9
2009	1,474.6	138.37	59.5	204.0

REVPAR- Calendar Year 2011, thru May

Year	(\$'s)	% Change
2011	73.13	7.1
2010	68.31	11.3
2009	61.40	-18.2

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

State Room Occupancy Taxes: May 2011 & Fiscal Year 2011

- For the month of May 2011 (FY11), the net room occupancy tax collections of \$13.9 million increased by 6.5% from the May 2010 (FY10) collections of \$13.1 million. The May 2010 collections were a 17.0% increase from the May 2009 (FY09) collections of \$11.2 million.
- For FY2011 YTD net room occupancy tax collections totalled \$150.6 million, a 10.4% increase from FY10. The FY10 collections of \$136.4 million were 7.2 % less than the FY09 collections of \$147.0 million.

State Room Occupancy Tax Collections

Month of May

Year	\$ (000)	% Change
FY2011	13,923.4	6.5
FY2010	13,075.9	17.0
FY2009	11,174.5	-21.6

FYTD thru May

Year	\$ (000)	% Change
FY2011	150,607.3	10.4
FY2010	136,381.6	-7.2
FY2009	146,960.6	-7.2

Source: Mass DOR Monthly Report of Collections and Refunds.

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

- **For the month of May 2011 (FY11)**, the local option room occupancy tax collections of \$10.8 million increased 9.1% from the May 2010 (FY10) collections of \$9.9 million. The May 2010 collections were a 63.9% increase from the May 2009 (FY09) collections of \$6.0 million (note: new law allowed local option tax rate increases in communities).
- **For FY2011 YTD**, local option room occupancy tax collections totalled \$118.2 million, a 31.0% increase from FY10. (See note above). The FY10 collections of \$90.2 million were a 9.8% increase over the the FY09 collections of \$82.1 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of May

Year	\$ (000)	% Change
FY2011	10,794.9	9.1
FY2010	9,895.5	63.9
FY2009	6,035.7	-21.6

FYTD thru May

Year	\$ (000)	% Change
FY2011	118,214.4	31.0
FY2010	90,220.2	9.8
FY2009	82,183.1	-6.8

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

The May FYTD2011 MTF collections totaled \$34.9 million which was a 8.9% increase from the \$32.1 million collected during the same period in FY2010. The FY2010 collections were an increase of 4.7% from the FY2009 collections of \$30.7 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: May 2011 and CYTD 2011

Massachusetts' museum and attraction attendance increased 9.9% in the month of May 2011 compared to May 2010 (1,160,273 vs. 1,055,621 visitors). The total net visitor increase was 104,652 at the 58 institutions reporting visitor data.

For calendar year 2011 thru May attendance is up 0.9% to 4,156,347 from the 4,119,486 during the same period in CY2010, an increase of 36,861 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: May 2011

- In **May 2011**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.2 million, an increase of 10.6% from the May 2010 total of 2.0 million. The CYTD2011 thru May total was 9.7 million, up 7.8% from the 9.0 million last year.

- The number of **international passenger** arrivals and departures increased in May 2011 by 14.7% compared to May 2010 to 366 k from 319 k. The CYTD thru May totals were up 2.9% to 1,381k from 1,342 k last year.

Domestic Passenger Volume

May	(000)s	% Change
2011	2,235	10.6
2010	2,021	7.2
2009	1,886	-4.7

International Passenger Volume

May	(000)s	% Change
2011	366	14.7
2010	319	2.3
2009	312	-11.1

Domestic Passenger Volume

CYTD May	(000)s	% Change
2011	9,749	7.8
2010	9,047	8.3
2009	8,350	-8.3

International Passenger Volume

CYTD May	(000)s	% Change
2011	1,381	2.9
2010	1,342	-4.0
2009	1,398	-12.2

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 & U.S. Calendar Year 2010 & May 2011

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u> MA share of Market in 2010	<u>Visitors to U.S.</u> CYTD 2011 thru May
	2010 Visitors (000s)	Change from 2009		
ALL OVERSEAS	1,292	2.6%	4.9%	6.3%
WESTERN EUROPE	614	-5.2%	5.4%	8.1%
Canada	n/a	n/a	n/a	5.8%
United Kingdom	189	1.1%	4.9%	4.7%
Germany	121	10.0%	7.0%	0.9%
Japan	71	86.8%	2.1%	-6.6%
Ireland	21	-41.7%	5.8%	-0.6%
France	70	7.7%	5.2%	24.1%
Italy	41	-19.6%	4.9%	12.1%
Netherlands	35	-22.2%	6.2%	5.9%
Brazil	54	-5.3%	4.5%	27.0%
Spain	30	42.9%	4.7%	9.9%
Argentina	19	-5.0%	4.4%	17.5%

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 May

CYTD, visitation from Canada, which is Massachusetts number one international visitor origin market, was up 5.8% thru May, visits from western Europe were up 8.1% while all Overseas visitation was up 6.3%.



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: June 2011 and First Quarter CY 2011

The **MASSVACATION.COM** site had 95,874 **visits** in June 2011 down 25.4% from the 128,432 in June 2010. Additionally, there were 438,244 **page views**, down 21.3% from the **557,124** the prior June. The **average time on the site** went up 5.6% to 3 minute 33 seconds. The most visited page, **Lodging**, had 16,679 views. **Visits originating** in the U.S. decreased by 27.3% to 83,420. Visits from Canada decreased 15.4% to 4,913 and Visits from the U.K. decreased 2.4% to 1,322.

For **CYTD 2011 Quarter 1** the total **visits** were **271,704 up 51.3% from the 179,603 in CY2010 Q 1** and the **page views were up 1.5% to 972,858** from 958,410. The average time on the site was **2 minutes 14 seconds** (down 40.5%). The **United States** generated the most website visits with **239,892** (up 60.5%). **Canada** followed with **8,878** (up 4.6%) and the **United Kingdom** was third with **4,417** (down 7.7%). The **Winterfun (158.3k)** and **Find Lodging (32.1k)** pages had the most views. The top region page was **Cape Cod** with **19.1k**.

Source: MOTT- (Google Analytics)

Lesbian Gay Bisexual Transgender (LGBT) data: June 2011 & CY2011 First Quarter

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 June 2011, there were 5,010 visits and 11,794 page views. During the First Quarter of 2011 there were 28,246 visits and 68,508 page views.

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

(Source: CMI and MOTT)

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

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