



**Office of Travel & Tourism**

massvacation.com

**MOTT TravelStats Newsletter - March 2010**

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: February 2010**

- During the month of February 2010, Massachusetts statewide lodging room demand (1,012K) increased 6.9% compared to February 2009 (947.2k). The average daily room rate between these two periods decreased by 5.2% to \$109.42 from \$115.38. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 3.0 percentage points to 48.2 from 45.2 percent. Overall room revenue increased 1.3% to \$110.7 mil from \$109.3 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD February over same period last year by 4.8% to \$49.83 from \$47.62. Occupancy was up 9.8% and the room rate decreased by 4.7%.

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 February

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2010	1,012.0	109.42	48.2	110.7
2009	947.2	115.38	45.2	109.3
2008	1,056.6	126.80	51.1	134.0

REVPAR- Calendar Year 2010, thru February

Year	(\$'s)	% Change
2010	49.83	4.6
2009	47.62	-18.3
2008	58.27	9.4

**Room Occupancy Taxes: February 2010 & Fiscal Year 2010 thru February**

- For the month of February 2010 (FY10), the net room occupancy tax collections of \$7.5 million increased by 11.8% from the February 2009 (FY09) collections of \$6.7 million. The February 2009 collections were a 19% decrease from the February 2008 (FY08) collections of \$8.2 million.
- For FY2010 to date thru February 2010, net room occupancy tax collections totalled \$106.2 million, an 8.9% increase from the same period of FY09. The FY09 collections of \$119.6 million were 3.5 % less than the FY08 collections of \$123.9 million.

Source: Mass DOR Monthly Report of Collections and Refunds

**Total Room Occupancy Tax Collections**

Month of February

Year	\$ (000)	% Change
FY2010	7,453.5	11.8
FY2009	6,667.7	-19.0
FY2008	8,236.4	17.3

FY2010 thru February

Year	\$ (million)	% Change
FY2010	106.2	-11.2
FY2009	119.6	-3.5
FY2008	123.9	-11.3

## Ma Tourism Fund (MTF) Collections: FY2010 thru February and FY2009

The FY2010 thru February 2010 MTF collections totaled \$25.4 mil which was a 12.4% decrease from the \$28.9 mil collected during the same period of FY2009.

The final FY2009 collections totaled \$38.3 million. The FY2009 collections were 8.0% lower than the FY2008 collections (\$38.3 million v. \$41.7 million).

Source: Mass DOR Monthly Report of Collections and Refunds

## Museum and Attraction Attendance: February 2010 and CYTD 2010

Massachusetts' museum and attraction attendance increased 6.5% in the month of February 2010 compared to February 2009 (724,160 visitors v. 680,078 visitors). The total net visitor increase was 44,082 at the 57 institutions reporting visitor data.

For calendar year 2010 thru February attendance is up 12.0% to 1,320,038 from the 1,178,361 attendees during the same period in CY2009, an increase of 141,677 visitors.

(Source: Museum of Science Monthly attendance report)

## Logan International Airport Passenger Volume: February 2010 and CYTD 2010

- In **February 2010**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.51 million, an increase of 3.8% from the February 2009 total of 1.46 million. The CYTD2010 thru February total was 3.1 million up 8.3% from last year.
- The number of **international passenger** arrivals and departures decreased in February 2010 by 6.2% compared to February 2009 from 227k to 213k. The CYTD thru February totals were down 3.1% to 454k from 469k last year.

**Domestic Passenger Volume**

February	(000)s	% Change
2010	1,514	3.8
2009	1,459	-11.1
2008	1,641	-0.3

**International Passenger Volume**

February	(000)s	% Change
2010	213	-6.2
2009	227	-17.0
2008	274	6.8

**Domestic Passenger Volume**

CYTD February	(000)s	% Change
2010	3,068	8.3
2009	2,832	-11.0
2008	3,184	-3.6

**International Passenger Volume**

CYTD February	(000)s	% Change
2010	454	-3.1
2009	469	-15.3
2008	553	4.7



**Domestic Visitation to Massachusetts FY2009:**

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	4,404,000	28.3%
New York	2,317,000	14.9%
Connecticut	1,456,000	9.4%
New Hampshire	823,000	5.3%
Rhode Island	675,000	4.3%
California	683,000	4.4%
Florida	455,000	2.9%
New Jersey	717,000	4.6%
Maine	595,000	3.8%
Virginia	173,000	1.1%
Pennsylvania	617,000	4.0%
Vermont	356,000	2.3%
Sub Total	13,271,000	
All Other States	2,289,000	14.7%
All New England States	8,309,000	53.4%
All Mid Atlantic States	3,652,000	23.5%

Source:TNS, Travels America, FY2009

The total domestic trips to Massachusetts in FY2009 were 15.6 million. The primary trip purpose in FY2009 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, FY2009

**International Visitors to MA in CY2008 and to U.S. in CY2009 and CY2010**

	Visitors to Massachusetts		CY2009 change in Visitors to U.S.	CY2010 thru January change in Visitors to U.S.
	2008 Visitors	2008 SHARE of U.S. MARKET		
	(000s)			
<b>ALL OVERSEAS</b>	<b>1,267</b>	<b>5.0%</b>	<b>-6.3%</b>	<b>8.3%</b>
<b>WESTERN EUROPE</b>	<b>720</b>	<b>5.9%</b>	<b>-10.0%</b>	<b>1.1%</b>
<b>Canada</b>	<b>635</b>	<b>3.4%</b>	<b>-5.0%</b>	<b>13.4%</b>
<b>United Kingdom</b>	<b>237</b>	<b>5.2%</b>	<b>-14.6%</b>	<b>-5.2%</b>
<b>Germany</b>	<b>123</b>	<b>6.9%</b>	<b>-5.4%</b>	<b>4.7%</b>
<b>Japan</b>	<b>62</b>	<b>1.9%</b>	<b>-10.2%</b>	<b>8.7%</b>
<b>Ireland</b>	<b>52</b>	<b>9.7%</b>	<b>-22.6%</b>	<b>n/a</b>
<b>France</b>	<b>57</b>	<b>4.6%</b>	<b>-3.2%</b>	<b>4.2%</b>
<b>Italy</b>	<b>58</b>	<b>7.5%</b>	<b>-3.4%</b>	<b>7.3%</b>
<b>Netherlands</b>	<b>33</b>	<b>5.4%</b>	<b>-9.9%</b>	<b>2.9%</b>
<b>Brazil</b>	<b>45</b>	<b>5.9%</b>	<b>16%</b>	<b>30.1%</b>
<b>Spain</b>	<b>32</b>	<b>4.9%</b>	<b>-9.4%</b>	<b>10.0%</b>
<b>Argentina</b>	<b>16</b>	<b>5.1%</b>	<b>12%</b>	<b>11.6%</b>

**Travel to Massachusetts from MOTT target markets in CY2008**

Estimated OVERSEAS visits to Massachusetts during **CY2008** was just under **1.3 million**. This was an 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.

**Travel to U.S. from MOTT target markets for all of CY2009**

For CY 2009 through December 2009, all Overseas travel to the U.S. has dropped 6.3%. Visitation from Canada to U.S. has dropped 5.0%, while visits from Western Europe have declined 10.0% compared to CY 2008.

**Travel to U.S. from MOTT target markets for January 2010**

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 13.4% in January and all Overseas visitation was up 8.3%. This trend, if it continues, bodes well for international travel to the Commonwealth.

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, CY2008

Domestic and International traveler expenditures totaled \$15.6 billion in MA during 2008, up 2.9% from 2007. Domestic traveler spending increased 1.4% while international traveler spending increased 13.3 %. Total expenditures generated \$962.7 million in state and local taxes for MA.

<i>2008 Expenditures in MA</i>	<b>Domestic</b>	<b>International</b>	<b>Total</b>
<b>By Industry</b>	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$4,419.0	\$265.3	\$4,684.3
Auto Transportation	2,016.5	29.2	2,045.8
Lodging	2,851.4	712.6	3,564.0
Foodservice	2,605.4	375.9	2,981.3
Entertainment & Recreation	790.2	165.7	955.9
General Retail Trade	857.0	488.5	1,345.5
<b>2008 Totals</b>	<b>\$13,539.5</b>	<b>\$2,037.3</b>	<b>\$15,576.8</b>

Direct travel expenditures in the U.S. in CY2008 totaled \$773 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, 2008)

## MASSVACATION.COM Activity: March 2010 & First Quarter of CY2010

The **MASSVACATION.COM** site had **69,215 visits** in **March 2010**, down 6.3% from the 73,855 in March 2009. Additionally, there were **369,378 page views** in March, down 9.7% from the **409,219** in March 2009. The average time on the site went down 15.5% to **3 minutes 48 seconds**. The **Where To Go** page had the largest number of views with 36,810.

For CY2010 Q1, the total **visits** were **179,603 (down 7.2% from CY09 Q1)** and the **pageviews** were **0.96 million (down 23.1%)**. The average time on the **site** was **3 minutes 46 seconds (down 15.7%)**. The **United States** generated the most website visits with **149,418 (down 8.5%)**. **Canada** followed with **8,486 (up 5.6%)** and the **United Kingdom** was third with **4,787 (up 7.6%)**. The **Where To Go** page had the most visits in Q1 2010 with **87,883 pageviews**. The top three region pages were Cape Cod and the Islands (**19,630 views**), Greater Boston (**17,751**) and Western Mass (**12,749**)

Source: MOTT- (Google Analytics)



## Lesbian Gay Bisexual Transgender (LGBT) data: March 2010 & CYTD thru March

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.

The Massachusetts' **LGBT microsite** was launched on February 23, 2009 and the site utilization has been very high. Since inception thru December 2009 there were 65,347 visits and 145,661 pageviews.

In March 2010 there were 9,023 visits and 16,162 pageviews.

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

(Source: CM,I and MOTT)

## GETAWAY GUIDE Distribution: Calendar Year 2009

For **calendar year 2009** just under **750,000** Getaway Guides were distributed to interested consumers.

Off this total, 85,000 requests came thru **FARM** (MOTT's on line fulfillment system)

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

## MOTT Updates and Activities from Tony D'Agostino: May 2010

The post conference survey of the attendees and sponsors of the 23<sup>rd</sup> Annual Governor's Conference on Travel and Tourism are in and the reviews are really strong. Just over 200 surveys were sent out by e-mail and 50 responded. Just over 93% of the considered the conference informative and 87% responded that the opportunity to network was very important.

