



**MOTT TravelStats Newsletter -MARCH 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](mailto:Tony.Dagostino@state.ma.us).

**Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: February 2011**

- During the month of February 2011, Massachusetts statewide lodging room demand (1,057.1k) increased 5.3% compared to February 2010 (1,003.6k). The average daily room rate between these two periods increased by 2.5% to \$112.58 from \$109.86. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 3.1 percentage points to 51.2% from 48.1%. Overall room revenue increased by 7.9% to \$119.0 mil from \$110.3 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD February over same period last year by 7.1% to \$53.54 from \$49.99. Occupancy was up 4.3% and the room rate increased 2.7%.

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)
2011	1,057.1	112.58	51.2	119.0
2010	1,003.6	109.86	48.1	110.3
2009	942.4	115.78	45.3	109.1

REVPAR- Calendar Year 2011, thru February

Year	(\$'s)	% Change
2011	53.54	7.1
2010	49.99	4.6
2009	47.80	-18.1

**State Room Occupancy Taxes: February 2011 & Fiscal Year 2011**

- For the month of February 2011 (FY11), the net room occupancy tax collections of \$7.4 million decreased by 0.9% from the February 2010 (FY10) collections of \$7.5 million. The February 2010 collections were a 11.8% increase from the February 2009 (FY09) collections of \$6.6 million.
- For FY2011 YTD net room occupancy tax collections totalled \$117.5 million, a 10.7% increase from FY10. The FY10 collections of \$106.2 million were 11.2 % less than the FY09 collections of \$119.6 million.

Source: Mass DOR Monthly Report of Collections and Refunds

**State Room Occupancy Tax Collections**

Month of February

Year	\$ (000)	% Change
FY2011	7,386.5	-0.9
FY2010	7,453.5	11.8
FY2009	6,667.7	-19.1

FYTD thru February

Year	\$ (000)	% Change
FY2011	117,547.7	10.7
FY2010	106,229.4	-11.2
FY2009	119,565.9	-3.5

**Local Option Room Occupancy Taxes: February 2011 & Fiscal Year 2011**

- For the month of February 2011 (FY11), the local option room occupancy tax collections of \$5.9 million increased 4.2% (note: new law allowed local option tax rate increases in communities) from the February 2010 (FY10) collections of \$5.6 million. The February 2010 collections were a 52.1% increase from the February 2009 (FY09) collections of \$3.7 million.
  
- For FY2011 YTD, local option room occupancy tax collections totalled \$92.3 million, a 37.1% increase from FY10. (See note above). The FY10 collections of \$67.33 million were slightly more than the FY09 collections of \$67.32 million.

Source: Mass DOR Monthly Report of Collections and Refunds

**Local Room Occupancy Tax Collections**

Month of February

Year	\$ (000)	% Change
FY2011	5,879.6	4.2
FY2010	5,640.4	52.1
FY2009	3,707.6	-18.7

FYTD thru February

Year	\$ (000)	% Change
FY2011	92,346.5	37.1
FY2010	67,334.3	0.0
FY2009	67,321.8	-3.2

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

The February FYTD 2011 MTF collections totaled \$27.7 million which was a 9.1% increase from the \$25.4 million collected during the same period in FY2010. The FY2010 collections were 12.4% less than the FY2009 collections of \$28.9 million.

Source: Mass DOR Monthly Report of Collections and Refunds

**Museum and Attraction Attendance: February 2011 and CYTD 2011**

Massachusetts' museum and attraction attendance decreased 14.8% in the month of February 2011 compared to February 2010 (625,579 visitors vs. 734,471 visitors). The total net visitor decrease was 108,892 at the 59 institutions reporting visitor data.

For calendar year 2011 thru February attendance is down 15.6% to 1,129,296 from the 1,337,449 during the same period in CY2010, a decrease of 208,153 visitors.

(Source: Museum of Science Monthly attendance report)

**Logan International Airport Passenger Volume: February 2011**

- In **February** 2011, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.56 million, an increase of 5.7% from the February 2010 total of just 1.5 million. The CYTD2011 thru February total was 3.24 million, up 5.7% from the 3.07 million last year.
- The number of **international passenger** arrivals and departures decreased in February 2011 by 9.7% compared to February 2010 to 192 k from 213 k. The CYTD thru February totals were down 9.7% to 409 k from 454 k last year.

**Domestic Passenger Volume**

February	(000)s	% Change
2011	1,559	5.7
2010	1,514	3.8
2009	1,459	-11.1

**International Passenger Volume**

February	(000)s	% Change
2011	192	-9.7
2010	213	-6.2
2009	227	-17.0

**Domestic Passenger Volume**

CYTD February	(000)s	% Change
2011	3,244	5.7
2010	3,068	8.3
2009	2,832	-11.0

**International Passenger Volume**

CYTD February	(000)s	% Change
2011	409	-9.7
2010	454	-3.1
2009	469	-15.3

Source: MASSPORT



## **Domestic Visitation to Massachusetts FY2010:**

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

<b><u>Origin State</u></b>	<b><u>Person trips</u></b>	<b><u>Share of all trips</u></b>
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%
<b>Sub Total</b>	<b>14,173,500</b>	<b>85.1%</b>
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](http://massvacation.com) for more details.

Source: TNS, Travels America, FY2010

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

	Visitors to Massachusetts		Visitors to Massachusetts	Visitors to U.S. CYTD 2011 thru February
	2010 Visitors (000s)	Change from 2009		
<b>ALL OVERSEAS</b>	<b>1,292</b>	<b>2.6%</b>	<b>4.9%</b>	<b>6.4%</b>
<b>WESTERN EUROPE</b>	<b>614</b>	<b>-5.2%</b>	<b>5.4%</b>	<b>2.6%</b>
<b>Canada</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>6.0%</b>
<b>United Kingdom</b>	<b>189</b>	<b>1.1%</b>	<b>4.9%</b>	<b>1.5%</b>
<b>Germany</b>	<b>121</b>	<b>10.0%</b>	<b>7.0%</b>	<b>-3.3%</b>
<b>Japan</b>	<b>71</b>	<b>86.8%</b>	<b>2.1%</b>	<b>3.5%</b>
<b>Ireland</b>	<b>21</b>	<b>-41.7%</b>	<b>5.8%</b>	<b>n/a%</b>
<b>France</b>	<b>70</b>	<b>7.7%</b>	<b>5.2%</b>	<b>17.5%</b>
<b>Italy</b>	<b>41</b>	<b>-19.6%</b>	<b>4.9%</b>	<b>5.4%</b>
<b>Netherlands</b>	<b>35</b>	<b>-22.2%</b>	<b>6.2%</b>	<b>0.5%</b>
<b>Brazil</b>	<b>54</b>	<b>-5.3%</b>	<b>4.5%</b>	<b>19.5%</b>
<b>Spain</b>	<b>30</b>	<b>42.9%</b>	<b>4.7%</b>	<b>11.3%</b>
<b>Argentina</b>	<b>19</b>	<b>-5.0%</b>	<b>4.4%</b>	<b>19.2%</b>

### 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 CY 2011 thru February

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 6.0, visits from western Europe were up 2.6% while all Overseas visitation was up 6.4%.



## 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>	<b>Domestic</b>	<b>International</b>	<b>Total</b>
<b>By Industry</b>	<b>(\$ Millions)</b>	<b>(\$ Millions)</b>	<b>(\$ Millions)</b>
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
<b>2009 Totals</b>	<b>\$12,419.2</b>	<b>\$1,933.5</b>	<b>\$14,352.6</b>

### Impact of Domestic Travel on MA Counties, 2009

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

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



## **MASSVACATION.COM Activity: March 2011 and First Quarter CY 2011**

The **MASSVACATION.COM** site had **69,278 visits** in March 2011 up 0.1% from the 69,215 in March 2010. Additionally, there were **318,083 page views**, down 13.9% from the **369,378** the prior March. The average time on the site went down 15% to **3 minute 14 seconds**. The most visited page, **Winterfun (a new page)**, had 14,172 views. **Visits** originating in the U.S. increased by 1% to 58,462. Visits from Canada decreased 13% to 3,287 and Visits from the U.K. decreased 7.9% to 1,345.

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: March 2011 & CY2011 First Quarter**

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.

In March 2011 there were 14,744 visits and 29,388 page views. During the First Quarter of 2011 there have been 28,246 visits and 68,508 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: March 2011**

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