



Office of Travel & Tourism

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MOTT TravelStats Newsletter - May 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.

Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: April 2010

- During the month of April 2010, Massachusetts statewide lodging room demand (1,441.9k) increased 13.6% compared to April 2009 (1,270.9k). The average daily room rate between these two periods increased by 4.4% to \$132.31 from \$126.78. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 7.4 percentage points to 61.8 from 54.4 percent. Overall room revenue increased 18.4% to \$191.1 mil from \$161.1 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD April over same period last year by 10.7% to \$61.47 from \$55.51. Occupancy was up 12.3% but the room rate decreased by 1.4%.

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 April

| Year | DEMAND (000's) | RATE (\$'s) | Occupancy Rate % | REVENUE (millions) |
|------|----------------|-------------|------------------|--------------------|
| 2010 | 1,441.9 | 132.31 | 61.8 | 190.8 |
| 2009 | 1,270.9 | 126.78 | 54.4 | 161.1 |
| 2008 | 1,440.2 | 143.63 | 62.4 | 206.9 |

REVPAR- Calendar Year 2010, thru April

| Year | (\$'s) | % Change |
|------|--------|----------|
| 2010 | 61.47 | 10.7 |
| 2009 | 55.51 | -19.5 |
| 2008 | 68.99 | 7.8 |

Room Occupancy Taxes: April 2010 & Fiscal Year 2010 thru April

- For the month of April 2010 (FY10), the net room occupancy tax collections of \$9.74 million increased by 9.1% from the April 2009 (FY09) collections of \$8.93 million. The April 2009 collections were a 17.9% decrease from the April 2008 (FY08) collections of \$10.9 million.
- For FY2010 to date thru April 2010, net room occupancy tax collections totalled \$123.3 million, a 9.2% decrease from the same period of FY09. The FY09 collections of \$135.8 million were 5.8 % less than the FY08 collections of \$144.2 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Total Room Occupancy Tax Collections

Month of April

| Year | \$ (000) | % Change |
|--------|----------|----------|
| FY2010 | 9,736.6 | 9.1 |
| FY2009 | 8,927.0 | -17.8 |
| FY2008 | 10,867.4 | 8.6 |

FY2010 thru April

| Year | \$ (million) | % Change |
|--------|--------------|----------|
| FY2010 | 123.3 | -9.2 |
| FY2009 | 135.8 | -5.8 |
| FY2008 | 144.2 | 11.3 |

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

The FY2010 thru April 2010 MTF collections totaled \$29.3 mil which was a 4.6% decrease from the \$30.7 mil collected during the same period of FY2009.

The final FY2009 collections totaled \$30.7 million. The FY2009 collections were 12.1% lower than the FY2008 collections (\$30.6 million v. \$34.9 million).

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: April 2010 and CYTD 2010

Massachusetts' museum and attraction attendance decreased 1.7% in the month of April 2010 compared to April 2009 (1,118,351 visitors v. 1,138,006 visitors). The total net visitor decrease was 19,655 at the 60 institutions reporting visitor data.

For calendar year 2010 thru April attendance is up 2.3% to 3,131,731 from the 3,060,810 attendees during the same period in CY2009, an increase of 70,921 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: April 2010 and CYTD 2010

- In **April 2010**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.03 million, an increase of 8.7% from the April 2009 total of 1.87 million. The CYTD2010 thru April total was 7.0 million, up 8.7% from last year.
- The number of **international passenger** arrivals and departures decreased in April 2010 by 13.1% compared to April 2009 from 322k to 280k. The CYTD thru April totals were down 5.8% to 1.02 mil from 1.09 mil last year.

Domestic Passenger Volume

| April | (000)s | % Change |
|-------|--------|----------|
| 2010 | 2,028 | 8.7 |
| 2009 | 1,866 | -7.2 |
| 2008 | 2,010 | -5.6 |

International Passenger Volume

| April | (000)s | % Change |
|-------|--------|----------|
| 2010 | 280 | -13.1 |
| 2009 | 322 | -7.2 |
| 2008 | 347 | 2.1 |

Domestic Passenger Volume

| CYTD April | (000)s | % Change |
|------------|--------|----------|
| 2010 | 7,025 | 8.7 |
| 2009 | 6,463 | -9.3 |
| 2008 | 7,126 | -5.2 |

International Passenger Volume

| CYTD April | (000)s | % Change |
|------------|--------|----------|
| 2010 | 1,023 | -5.8 |
| 2009 | 1,086 | -12.5 |
| 2008 | 1,241 | 2.6 |



Domestic Visitation to Massachusetts CY2009:

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 | 4,704,000 | 30.3% |
| New York | 2,209,000 | 14.2% |
| Connecticut | 1,524,000 | 9.8% |
| New Hampshire | 637,000 | 4.1% |
| Rhode Island | 395,000 | 2.5% |
| California | 478,000 | 3.1% |
| Florida | 627,000 | 4.0% |
| New Jersey | 787,000 | 5.1% |
| Maine | 487,000 | 3.1% |
| Virginia | 163,000 | 1.1% |
| Pennsylvania | 562,000 | 3.6% |
| Vermont | 597,000 | 3.8% |
| Sub Total | 13,170,000 | 91.7% |
| All Other States | 1,286,000 | 8.3% |
| All New England States | 8,344,000 | 53.8% |
| All Mid Atlantic States | 3,558,000 | 22.9% |

Source:TNS, Travels America, CY2009

The total domestic trips to Massachusetts in CY2009 were 15.5 million. The primary trip purpose in CY2009 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, CY2009

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 February change in Visitors to U.S. |
|-----------------------|---------------------------|---------------------------|-----------------------------------|---|
| | 2008 Visitors (000s) | 2008 SHARE of U.S. MARKET | | |
| ALL OVERSEAS | 1,267 | 5.0% | -6.3% | 9.2% |
| WESTERN EUROPE | 720 | 5.9% | -10.0% | 1.5% |
| Canada | 635 | 3.4% | -5.0% | 10.7% |
| United Kingdom | 237 | 5.2% | -14.6% | -3.4% |
| Germany | 123 | 6.9% | -5.4% | 3.6% |
| Japan | 62 | 1.9% | -10.2% | 10.7% |
| Ireland | 52 | 9.7% | -22.6% | -19.1% |
| France | 57 | 4.6% | -3.2% | 3.3% |
| Italy | 58 | 7.5% | -3.4% | 8.9% |
| Netherlands | 33 | 5.4% | -9.9% | 5.0% |
| Brazil | 45 | 5.9% | 16% | 33.8% |
| Spain | 32 | 4.9% | -9.4% | 10.7% |
| Argentina | 16 | 5.1% | 12% | 11.1% |

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 February 2010

Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 10.7% in February and all Overseas visitation was up 9.2%.

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> | Domestic | International | Total |
|--------------------------------|-------------------|----------------------|-------------------|
| By Industry | (\$ 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 |
| 2008 Totals | \$13,539.5 | \$2,037.3 | \$15,576.8 |

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: May 2010 & First Quarter of CY2010

The **MASSVACATION.COM** site had **93,415 visits** in **May 2010**, down 8.8% from the 102,472 in May 2009. Additionally, there were **485,209 page views** in May, down 16.3% from the **579,917** in May 2009. The average time on the site went down 10.41% to **4 minutes 3 seconds**. The **Find Lodging** page had the largest number of views with 18,022 up 3.9% from May, 2009. **Visits** originating in Canada increased by 7.3% to 4,926.

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: May 2010 & CYTD thru May

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.

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 May 2010 there were 9,258 visits and 19,483 page views. Calendar Year to Date thru May there have been 40,753 visits and 76,163 page views.

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: June 2010

Thanks to intern Liza Heussler for pulling this addition of TravelStats together.

