



MOTT TravelStats Newsletter -MAY 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: April 2011

- During the month of April 2011, Massachusetts statewide lodging room demand (1,501.7k) increased 4.5% compared to April 2010 (1,436.7k). The average daily room rate between these two periods increased by 1.4% to \$134.41 from \$132.59. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 3.2 percentage points to 64.9% from 61.7%. Overall room revenue increased by 6.0% to \$201.8 mil from \$190.5 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD April over same period last year by 7.6% to \$66.26 from \$61.57. Occupancy was up 5.0% and the room rate increased 2.5%.

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)
2011	1,501.7	134.41	64.9	201.8
2010	1,436.7	132.59	61.7	190.5
2009	1,269.1	126.77	54.4	160.9

REVPAR- Calendar Year 2011, thru April

Year	(\$'s)	% Change
2011	66.26	7.6
2010	61.57	10.6
2009	55.65	-19.4

State Room Occupancy Taxes: April 2011 & Fiscal Year 2011

- For the month of April 2011 (FY11), the net room occupancy tax collections of \$10.9 million increased by 12.0% from the April 2010 (FY10) collections of \$9.7 million. The April 2010 collections were a 9.1% increase from the April 2009 (FY09) collections of \$8.9 million.
- For FY2011 YTD net room occupancy tax collections totalled \$136.7 million, a 10.9% increase from FY10. The FY10 collections of \$123.3 million were 9.2 % less than the FY09 collections of \$135.8 million.

Source: Mass DOR Monthly Report of Collections and Refunds.

State Room Occupancy Tax Collections

Month of April

Year	\$ (000)	% Change
FY2011	10,901.9	12.0
FY2010	9,736.6	9.1
FY2009	8,927.0	-17.9

FYTD thru April

Year	\$ (000)	% Change
FY2011	136,683.9	10.9
FY2010	123,305.7	-9.2
FY2009	135,786.1	-5.8

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

- For the month of April 2011 (FY11), the local option room occupancy tax collections of \$8.5 million increased 15.7% (note: new law allowed local option tax rate increases in communities) from the April 2010 (FY10) collections of \$7.4 million. The April 2010 collections were a 52.1% increase from the April 2009 (FY09) collections of \$4.8 million.

- For FY2011 YTD, local option room occupancy tax collections totalled \$107.4 million, a 33.7% increase from FY10. (See note above). The FY10 collections of \$80.3 million were a 5.5% increase over the the FY09 collections of \$76.1 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of April

Year	\$ (000)	% Change
FY2011	8,518.9	15.7
FY2010	7,361.7	52.1
FY2009	4,841.1	-18.1

FYTD thru April

Year	\$ (000)	% Change
FY2011	107,419.5	33.7
FY2010	80,324.8	5.5
FY2009	76,147.4	-5.4

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

The April FYTD2011 MTF collections totaled \$31.9 million which was a 9.1% increase from the \$29.3 million collected during the same period in FY2010. The FY2010 collections were 4.6% less than the FY2009 collections of \$30.7 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: April 2011 and CYTD 2011

Massachusetts' museum and attraction attendance increased 8.2% in the month of April 2011 compared to April 2010 (1,153,352 visitors vs. 1,066,165 visitors). The total net visitor increase was 87,187 at the 59 institutions reporting visitor data.

For calendar year 2011 thru April attendance is down 2.2% to 3,013,014 from the 3,080,054 during the same period in CY2010, a decrease of 67,040 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: April 2011

- In **April 2011**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.1 million, an increase of 5.4% from the April 2010 total of 2.0 million. The CYTD2011 thru April total was 7.5 million, up 7.0% from the 7.0 million last year.
- The number of **international passenger** arrivals and departures increased in April 2011 by 21.1% compared to April 2010 to 339 k from 280 k. The CYTD thru April totals were down 0.8% to 1,015 k from 1,023 k last year.

Domestic Passenger Volume

April	(000)s	% Change
2011	2,137	5.4
2010	2,028	8.7
2009	1,866	-7.2

International Passenger Volume

April	(000)s	% Change
2011	339	21.1
2010	280	-13.1
2009	322	-7.2

Domestic Passenger Volume

CYTD April	(000)s	% Change
2011	7,514	7.0
2010	7,025	8.7
2009	6,463	-9.3

International Passenger Volume

CYTD April	(000)s	% Change
2011	1,015	-0.8
2010	1,023	-5.8
2009	1,086	-12.5

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 & April 2011

	Visitors to Massachusetts		Visitors to Massachusetts	Visitors to U.S. CYTD 2011 thru April
	2010 Visitors (000s)	Change from 2009		
ALL OVERSEAS	1,292	2.6%	4.9%	7.5%
WESTERN EUROPE	614	-5.2%	5.4%	9.6%
Canada	n/a	n/a	n/a	6.4%
United Kingdom	189	1.1%	4.9%	6.0%
Germany	121	10.0%	7.0%	3.1%
Japan	71	86.8%	2.1%	-4.2%
Ireland	21	-41.7%	5.8%	-3.9%
France	70	7.7%	5.2%	27.7%
Italy	41	-19.6%	4.9%	11.9%
Netherlands	35	-22.2%	6.2%	11.0%
Brazil	54	-5.3%	4.5%	28.6%
Spain	30	42.9%	4.7%	10.5%
Argentina	19	-5.0%	4.4%	19.8%

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 April

April visits from western Europe were up over 40% driving year to date Visitation numbers up sharply. CYTD, Visitation from Canada, which is Massachusetts number one international visitor origin market, was up 6.4% thru April, visits from western Europe were up 9.6% while all Overseas visitation was up 7.5%.



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: May 2011 and First Quarter CY 2011

The **MASSVACATION.COM** site had **71,185 visits** in May 2011 down 23.8% from the 93,415 in May 2010. Additionally, there were **407,519 page views**, down 16.0% from the **485,209** the prior May. The average time on the site went down 5.2% to **3 minute 50 seconds**. The most visited page, **Lodging**, had 13,401 views. **Visits** originating in the U.S. decreased by 26.1% to 59,384. Visits from Canada decreased 18.9% to 3,996 and Visits from the U.K. increased 1.6% to 1,381.

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: May 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 May 2011 there were 5,768 visits and 13,228 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 May were capemass, bostonmass, westmass, and southmass.

(Source: CMI and MOTT)

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

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