



MOTT TravelStats Newsletter -JULY 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: June 2011

- During the month of June 2011, Massachusetts statewide lodging room demand (1,833.9k) increased 6.9% compared to June 2010 (1,716.3k). The average daily room rate between these two periods increased by 5.5% to \$147.66 from \$139.91. Occupancy rates, which reflect changes in both supply and demand for rooms increased by 5.2 percentage points to 76.6% from 71.4%. Overall room revenue increased by 12.8% to \$270.8 mil from \$240.1 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD June over same period last year by 8.5% to \$80.02 from \$73.75. Occupancy was up 4.9% and the room rate increased 3.4%.

Massachusetts Hotel Lodging Data

Month of June

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2011	1,833.9	147.66	76.6	270.8
2010	1,716.3	139.91	71.4	240.1
2009	1,543.4	137.59	64.2	212.4

REVPAR- Calendar Year 2011, thru June

Year	(\$'s)	% Change
2011	80.02	8.5
2010	73.75	11.6
2009	66.06	-18.5

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

State Room Occupancy Taxes: June 2011 & Fiscal Year 2011

- For the month of June 2011 (FY11), the net room occupancy tax collections of \$16.7 million increased by 5.3% from the June 2010 (FY10) collections of \$15.9 million. The June 2010 collections were a 13.4% increase from the June 2009 (FY09) collections of \$14.0 million.
- For FY2011 YTD net room occupancy tax collections totalled \$167.3 million, a 9.9% increase from FY10. The FY10 collections of \$152.2 million were 5.4% less than the FY09 collections of \$160.9 million.

State Room Occupancy Tax Collections

Month of June

Year	\$ (000)	% Change
FY2011	16,697.1	5.3
FY2010	15,851.5	13.4
FY2009	13,972.4	-11.2

FYTD thru June

Year	\$ (000)	% Change
FY2011	167,304.4	9.9
FY2010	152,233.1	-5.4
FY2009	160,933.0	-7.6

Source: Mass DOR Monthly Report of Collections and Refunds.

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

- **For the month of June 2011 (FY11)**, the local option room occupancy tax collections of \$13.1 million increased 7.2% from the June 2010 (FY10) collections of \$12.2 million. The June 2010 collections were a 59.7% increase from the June 2009 (FY09) collections of \$7.6 million (note: new law allowed local option tax rate increases in communities).
- **For FY2011 YTD**, local option room occupancy tax collections totalled \$131.3 million, a 28.2% increase from FY10. (See note above). The FY10 collections of \$102.4 million were a 14.0% increase over the the FY09 collections of \$89.8 million.

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of June

Year	\$ (000)	% Change
FY2011	13,067.2	7.2
FY2010	12,185.6	59.7
FY2009	7,632.2	-12.1

FYTD thru June

Year	\$ (000)	% Change
FY2011	131,281.6	28.2
FY2010	102,405.9	14.0
FY2009	89,815.2	-7.3

Ma Tourism Fund (MTF) Collections thru June: FYs 2011 and 2010

The June FYTD2011 MTF collections totaled \$38.6 million which was an 8.7% increase from the \$35.5 million collected during the same period in FY2010.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: June 2011 and CYTD 2011

Massachusetts' museum and attraction attendance increased 14.2% in the month of June 2011 compared to June 2010 (1,350,232 vs. 1,182,301 visitors). The total net visitor increase was 167,931 at the 57 institutions reporting visitor data.

For calendar year 2011 thru June attendance is up 4.1% to 5,425,557 from the 5,213,731 during the same period in CY2010, an increase of 211,826 visitors.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: June 2011

- In **June 2011**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.3 million, an increase of 8.5% from the June 2010 total of 2.1 million. The CYTD2011 thru June total was 12.0 million, up 7.9% from the 11.1 million last year.

- The number of **international passenger** arrivals and departures increased in June 2011 by 13.7% compared to June 2010 to 418 k from 368 k. The CYTD thru June totals were up 5.2% to 1,799k from 1,710 k last year.

Domestic Passenger Volume

June	(000)s	% Change
2011	2,263	8.5
2010	2,086	7.4
2009	1,943	-3.7

International Passenger Volume

June	(000)s	% Change
2011	418	13.7
2010	368	3.3
2009	356	-7.9

Domestic Passenger Volume

CYTD June	(000)s	% Change
2011	12,012	7.9
2010	11,132	8.2
2009	10,292	-7.5

International Passenger Volume

CYTD June	(000)s	% Change
2011	1,799	5.2
2010	1,710	-2.5
2009	1,754	-11.3

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 & June 2011

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u> MA share of Market in 2010	<u>Visitors to U.S.</u> CYTD 2011 thru June
	2010 Visitors (000s)	Change from 2009		
ALL OVERSEAS	1,292	2.6%	4.9%	6.4%
WESTERN EUROPE	614	-5.2%	5.4%	8.1%
Canada	n/a	n/a	n/a	5.9%
United Kingdom	189	1.1%	4.9%	2.8%
Germany	121	10.0%	7.0%	6.8%
Japan	71	86.8%	2.1%	-7.4%
Ireland	21	-41.7%	5.8%	-1.5%
France	70	7.7%	5.2%	20.8%
Italy	41	-19.6%	4.9%	10.7%
Netherlands	35	-22.2%	6.2%	7.6%
Brazil	54	-5.3%	4.5%	28.1%
Spain	30	42.9%	4.7%	10.2%
Argentina	19	-5.0%	4.4%	18.2%

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 June

CYTD thru June, visitation from Canada, which is Massachusetts number one international visitor origin market, was up 5.9%. Visits from Western Europe were up 8.1% 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>	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: July 2011 and First Quarter CY 2011

The **MASSVACATION.COM** site had **99,835 visits** in July 2011 down **15.5%** from the **118,133** in July 2010. Additionally, there were **474,640 page views**, down **22.3%** from the **610,496** the prior July. The **average time on the site went down 9.1%** to **3 minute 36 seconds**. The most visited page, **Lodging**, had 16,738 views. **Visits originating** in the U.S. decreased by **16.7%** to **85,829**. Visits from Canada decreased **7.8%** to **6,289** and Visits from the U.K. decreased **13.1%** to **1,531**.

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: July 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 July 2011, there were **5,498** visits and **12,506** 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 July were **wedding, iphone/directory, westmass, bostonmass, and capemass**.

(Source: CMI and MOTT)

MOTT Updates and Activities from Tony D'Agostino August 2011

Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities. Thanks to MOTT intern Christie Basile for helping pull this edition of TravelStats together.