



Office of Travel & Tourism

massvacation.com

MOTT TravelStats Newsletter - August 2009

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: July 2009

- During the month of July 2009, Massachusetts state wide lodging room demand (1,749k) decreased 3.7% compared to July 2008 (1,817k). The average daily room rate between these two periods decreased by 7.9% to \$140.38 from \$152.40. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 3.5 percentage points to 70.1% from 73.6%. Overall room revenue decreased 11.3% to \$245.5 mil from \$276.9 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CY2009 over same period in CY2008 by 17.5% to \$70.73 from \$85.74. Occupancy was down 9.9% and the room rate decreased by 8.5%.

Massachusetts Hotel Lodging Data

Month of July

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	1,749	140.38	70.1	245.5
2008	1,817	152.40	73.6	276.9
2007	1,789	144.03	73.9	257.6

REVPAR- Calendar Year 2009 thru July

Year	(\$'s)	% Change
2009	70.73	-17.5
2008	85.74	5.9
2007	80.98	2.9

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

Room Occupancy Taxes: July 2009 (Fiscal Year 2009)

- For the month of July 2009 (FY09), the net room occupancy tax collections of \$14.3 million decreased by 19.9% from the July 2008 (FY09) collections of \$17.8 million. The July 2008 collections were a 3.9% increase over the July 2007 (FY08) collections of \$17.1 million.
- For the July 2009 (Fiscal Year 2010), net room occupancy tax collections totalled \$14.3 million, a 19.9% decrease from the same period of FY09. The FY09 collections of \$17.8 million were 3.9% more than the FY08 collections of \$17.1 million.

Total Room Occupancy Tax Collections

Month of July

Year	\$ (000)	% Change
FY2010	14,265	-19.9
FY2009	17,809	3.9
FY2008	17,140	7.8

July (FY 2010)

Year	\$ (000)	% Change
FY2010	14,265	-19.9
FY2009	17,809	3.9
FY2008	17,140	7.8

Source: Mass DOR Monthly Report of Collections and Refunds

Ma Tourism Fund (MTF) Collections: July 2009 (FY2010)

Massachusetts Tourism Fund collections were not included in both the June 2009 (FY2009 year end) and the July 2009 MA DOR Blue Book report. The collections were included in the Schedule D General Fund section.

The final FY2008 collections totaled \$41.7 million. The FY2008 collections were 7.2% higher than the FY2007 collections (\$41.7 million v. \$38.9 million).

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: July 2009 and CYTD 2009

Massachusetts' museum and attraction attendance increased 1.3% in the month of July 2009 compared to July 2008 (1,695,515 visitors v. 1,673,713 visitors). The total net visitor increase was 21,802 at the 59 institutions reporting visitor data.

For all of calendar year 2009 thru July attendance was up 1.1% to 7.2 million from the 7.1 million attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: July 2009

- In **July 2009**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2.11 million, an increase of 1.6% from the July 2008 total of 2.08 million. Calendar year to date thru July the total was 12.4 million down 6.0%.
- The number of **international passenger** arrivals and departures decreased in July 2009 by 5.7% compared to July 2008 to 397k from 421k. Calendar year to date totals thru July are down 10.3% to 2,150,748 from 2,399,019.

Domestic Passenger Volume

July	(000)s	% Change
2009	2,108	1.6
2008	2,075	-6.1
2007	2,209	3.4

International Passenger Volume

July	(000)s	% Change
2009	397	-5.7
2008	421	-3.1
2007	434	3.9

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	12,400	-6.0
2008	13,197	-5.9
2007	14,018	2.2

International Passenger Volume

CYTD	(000)s	% Change
2009	2,151	-10.3
2008	2,399	-0.1
2007	2,401	-1.0

(Source: Massport)

Domestic Visitation to Massachusetts CY2008:

Domestic Visitors Origin: Top states and regions, CY2008

<u>Origin</u>	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	5,270,000	30.6%
New York	2,523,000	14.7%
Connecticut	1,740,000	10.1%
New Hampshire	886,000	5.1%
Rhode Island	804,000	4.7%
Maine	683,000	4.0%
New Jersey	640,000	3.7%
California	578,000	3.4%
Florida	550,000	3.2%
Pennsylvania	524,000	3.0%
Vermont	290,000	1.7%
Virginia	204,000	1.2%
All Other States	2,519,000	14.6%
All New England States	9,671,000	56.2%
All Mid Atlantic States	3,687,000	21.4%

There was a 6.5% decrease in domestic visitation to MA in CY2008 (17.2 mil) compared to CY2007 (18.4 mil). The primary trip purpose in CY2008 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.

International Visitors to Massachusetts in CY2008 and to U.S. in CY2009

	Visitors to Massachusetts		Change in visitors to U.S. in CY09 thru JUNE
	2008 Visitors (000s)	2008 SHARE of MARKET	
ALL OVERSEAS	1,267	5.0%	-10.3%
WESTERN EUROPE	720	5.9%	-11.2%
Canada	635	3.4%	-9.1%
United Kingdom	237	5.2%	-17.3%
Germany	123	6.9%	-8.4%
Japan	62	1.9%	-18.1%
Ireland	52	9.7%	-16.3%
France	57	4.6%	0.7%
Italy	58	7.5%	-3.2%
Netherlands	33	5.4%	-14.2%
Brazil	45	5.9%	7.8%
Spain	32	4.9%	-7.0%
Argentina	16	5.1%	7.2%

Travel to Massachusetts from MOTT target markets in CY02008

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

All travel to U.S. from MOTT target markets CYTD thru June 2009

For CY 2009 through June 2009, visitation from Canada to U.S. dropped 9.1%, while WE visits declined 11.2% compared to same period in CY 2008.

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, CY2007

Domestic and International travelers directly spent over \$15.1 billion in MA during 2007, up 6.6% from 2006. Domestic traveler spending increased 6% while international traveler spending increased 11.1%. Total expenditures generated \$943.5 million in state and local taxes for MA.

<i>2007 Expenditures in MA</i>	Domestic	International	Total
By Industry	(\$ Millions)	(\$ Millions)	(\$ Millions)
Public Transportation	\$4,392.9	\$231.9	\$4,624.8
Auto Transportation	1,908.7	24.6	1,933.3
Lodging	2,856.6	641.9	3,498.5
Foodservice	2,548.3	327.7	2,876.0
Entertainment & Recreation	769.4	148.6	918.0
General Retail Trade	870.5	423.4	1,293.9
2007 Totals	\$13,346.5	\$1,798.1	\$15,144.6

Direct travel expenditures in the U.S. in CY2007 totaled \$700 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, 2007)

MASSVACATION.COM Activity: August 2009 & CYTD Thru August 2009

The MASSVACATION.COM site had **97,990 unique visits** in August 2009, up 16% from 84,790 in August 2008. Additionally, there were **545,351 page views** in August, down 1% from the **549,475** in 2008. The **MassValuePass** page had the most views with **52,827**. The average time on the site was down 11% to **4 minutes 14 seconds**.

For CY2009 through August 2009, the total **visits** were **748,124 (down 7% from same time period in 2008)** and the **page views** were **4.3 million (down 4%)**. The average time on the site was **4 minutes 16 seconds (up 11%)**.

The **United States** generated the most website visits with **650,910 (down 9%)**. **Canada** followed with **33,345 (up 14%)** and the **United Kingdom** was third with **12,784 (up 3%)**.

The **Mass Value Pass** page had the most visits for CY2009 through August 2009 with **466,443**. The top three region pages were Cape Cod (88,903 views), Greater Boston (86,195), and Western Mass (77,248).

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Distribution: August 2009

The total number of **2009 Getaway Guides** distributed in **August** was just under 40,000. Of these, **almost 5,000 were individual requests from FARM** (the online fulfillment system). Another 10,800 were sent to the Big E trade show in West Springfield. Most of the remaining guides were sent to major information centers across the state (19,150), hotels and motels (700), and 1,250 were sent to AAA info centers.

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

Lesbian Gay Bisexual Transgender (LGBT): August 2009

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%)** by the LGBT community.

The Massachusetts' **LGBT micro site** was launched on January 23 and the site utilization has been very high. Since inception thru August 2009 there have been 43,000 visits and over 107,000 page views.

The top five information pages viewed were capemass, marriage, bostonmass, westmass, and southmass.

MOTT Updates and Activities from Tony D'Agostino: September 2009

A big thanks to intern Matt Hunt for helping prepare this edition of TravelStats.

Please note that a revised July 2009 TravelStats is now posted on Massvacation.com Research page.