

# Massachusetts

Office of Travel & Tourism

massvacation.com

## MOTT TravelStats Newsletter -December 2008

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: November 2008

- During the month of November 2008, Massachusetts state wide lodging room demand (1,214k) decreased 9.4% compared to November 2007 (1,340k). The average daily room rate between these two periods decreased by 7.2% to \$132.82 from \$143.10. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 6.6 percentage points to 53.54% from 60.1%. Overall room revenue decreased 15.9% to \$161.21 mil from \$191.7 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CYTD thru November 2008 over 2007 by 0.2% to \$90.11 from \$90.30. Occupancy was down 2.2% and the room rate was up 2.1%.

#### Massachusetts Hotel Lodging Data

##### Month of November

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2008	1,214	132.82	53.5	\$161.2
2007	1,340	143.10	60.1	\$191.7
2006	1,271	128.96	57.5	\$163.9

##### REVPAR- CYTD thru November

Year	(\$'s)	% Change
2008	90.11	-0.2
2007	90.30	7.1
2006	84.31	10.7

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

### Room Occupancy Taxes: November 2008 (Fiscal Year 2009)

- For the month of November 2008 (FY09), the net room tax collections of \$17.6 million decreased by 10.9% over the November 2007 (FY08) collections of \$19.8 million. The November 2007 collections were a 17.6% increase over the November 2006 (FY07) collections of \$16.8 million.
- For the Fiscal Year 2009 thru November 2008, net room occupancy tax collections totalled over \$91.7 million, a 0.7% decrease over the same period of FY08. The FY08 collections of \$92.4 million were 10.7% more than FY07.

#### Total Room Occupancy Tax Collections

##### Month of November

Year	\$ (000)	% Change
FY2009	17,638	-10.9
FY2008	19,810	17.6
FY2007	16,847	12.7

##### FYTD thru November

Year	\$ (000)	% Change
FY2009	91,761	-0.7
FY2008	92,411	10.7
FY2007	83,450	10.9

Source: Mass DOR Monthly Report of Collections and Refunds

## Ma Tourism Fund (MTF) Collections: FYTD November 2008 (FY09)

The November 2008(FY2009), Massachusetts Tourism Fund collections were down 1.9% compared to the November 2007 (FY2008) collections (\$22.4 million v. \$22.9 million). The FYTD November 2007 collections were 7.7% higher than the November 2006 (FY2007) collections (\$22.9 million v. \$21.2 million).

Source: Mass DOR Monthly Report of Collections and Refunds

## Museum and Attraction Attendance: November 2008

Massachusetts' museum and attraction attendance decreased 0.3% in the month of November 2008 compared to November 2007 (801,542 visitors v. 803,611 visitors). The total net visitor decrease was 2,069 at the 57 institutions reporting visitor data. Calendar year to date thru November attendance is up 2.3% to 11.6 from the 11.3 attendees during the same period in 2007.

(Source: Museum of Science Monthly attendance report)

## Logan International Airport Passenger Volume: November 2008

- In **November 2008**, the number of **domestic passengers** arriving to and departing from Logan International Airport totaled 1.865 million, a decrease of 11.1% from the November 2007 total of 2.099 million. Calendar year to date the volume is down 11.7% from prior year.
- The number of **international passenger** arrivals and departures decreased in November 2008 by 11.7% compared to November 2007. CYTD the volume is down by 2.6% from prior year.

Domestic Passenger Volume

November	(000)s	% Change
2008	1,600	-15.8
2007	1,900	- 2.9
2006	1,956	4.7

International Passenger Volume

November	(000)s	% Change
2008	248	-16.5
2007	297	11.0
2006	267	-6.1

Domestic Passenger Volume

CYTD thru November	(000)s	% Change
2008	20,427	-7.9
2007	22,178	1.9
2006	21,761	3.5

International Passenger Volume

CYTD thru November	(000)s	% Change
2008	3,720	-3.6
2007	3,861	2.4
2006	3,769	-4.7

(Source: Massport)

**Domestic Visitation to Massachusetts FY2008:**

**Domestic Visitors Origin: Top 10 States, FY2008**

<u>Origin</u>	Person Trips to Massachusetts	Share of all Person Trips
<b>Massachusetts</b>	6,733,000	34.7%
<b>New York</b>	2,500,000	12.9%
<b>Connecticut</b>	1,997,000	10.3%
<b>New Hampshire</b>	1,022,000	5.3%
<b>Rhode Island</b>	800,000	4.1%
<b>California</b>	631,000	3.3%
<b>Florida</b>	626,000	3.2%
<b>New Jersey</b>	575,000	3.0%
<b>Maine</b>	525,000	2.7%
<b>Virginia</b>	401,000	2.1%
<b>Pennsylvania</b>	386,000	2.0%
<b>Vermont</b>	380,000	2.0%
<b>All Other States</b>	2,803,000	14.5%
<b>All New England States</b>	11,457,000	59.1%
<b>All Mid Atlantic States</b>	3,461,000	17.9%

There was a 3.8% increase in domestic visitation to MA in FY2008 compared to FY2007. The primary trip purpose in FY2008 was visiting friends and/or relatives, the top activity was attending a family/social event, and 66% of visitors arrived in their own vehicle. Of the visitors that stayed overnight, 47% stayed in a hotel/motel/inn or B&B.

## International Visitors to Massachusetts in CY2007 and to U.S. in CY08

	Visitors to Massachusetts		Percentage change in visitors to U.S. in CY08 thru October
	2007 Visitors (000s)	2007 SHARE of MARKET	
<b>ALL OVERSEAS</b>	<b>1,171</b>	<b>4.9%</b>	<b>8.2%</b>
<b>WESTERN EUROPE</b>	<b>684</b>	<b>5.9%</b>	<b>15.3%</b>
<b>Canada</b>	<b>604</b>	<b>3.6%</b>	<b>9.8%</b>
<b>United Kingdom</b>	<b>243</b>	<b>5.4%</b>	<b>4.8%</b>
<b>Germany</b>	<b>85</b>	<b>5.6%</b>	<b>19.4%</b>
<b>Japan</b>	<b>64</b>	<b>1.8%</b>	<b>-6.7%</b>
<b>Ireland</b>	<b>48</b>	<b>9.7%</b>	<b>12.3%</b>
<b>France</b>	<b>47</b>	<b>4.7%</b>	<b>27.6%</b>
<b>Italy</b>	<b>41</b>	<b>6.7%</b>	<b>27.0%</b>
<b>Netherlands</b>	<b>28</b>	<b>5.6%</b>	<b>24.1%</b>
<b>Brazil</b>	<b>28</b>	<b>4.4%</b>	<b>20.9%</b>
<b>Spain</b>	<b>28</b>	<b>5.4%</b>	<b>33.3%</b>
<b>Argentina</b>	<b>18</b>	<b>6.7%</b>	<b>20.4%</b>

### Travel to Massachusetts

Estimated international visitation (ALL OVERSEAS plus Canada) to Massachusetts during **CY2007** was just under **1.8 million**. This was a 6% increase over the **CY2006** estimate of **1.7 million**.

Canadian visitors accounted for more than a third of all international visits to MA in **CY2007** at just over 604,000.

**Historically**, the top five origin countries to MA have been Canada, the United Kingdom, Germany, France and Italy.

### All travel to U.S.

For **CY2007**, international visitation to the U.S. increased by 11% to 56.7 million.

Canadian visitation increased by 10.9% while overseas visitation increased 10.3%.

Western European visitors to the U.S. increased by 12.6%

Data from OTTI for **CY2008 thru October** still show significant increases in **total visitors to the U.S. from Overseas (up 8.2%), Western Europe (up 15.7%) and Canada (up 9.8%)** suggesting good news for MA also.

Source: (Dept. of Commerce, OTTI) and StatsCanada

Please see the chart below for domestic and international spending data in MA for **CY2007**.

## 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>	<b>Domestic</b>	<b>International</b>	<b>Total</b>
<b>By Industry</b>	(\$ 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
<b>2007 Totals</b>	<b>\$13,346.5</b>	<b>\$1,798.1</b>	<b>\$15,144.6</b>

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: December and Calendar Year 2008

The MASSVACATION.COM site had **43,573 unique visits** in **December 2008**. Additionally, there were **210,878 page views**. Both these values were substantial increases from December 2007 when there were **34,365 unique visits** and **158,365 page views**. The average time on the site was down slightly to 2 minutes 30 seconds.

For **CY2008**, the total **unique visits** were 1,007,325 and the **page views** were 5,586,468. The **median length** of a visit was 3 minutes and 46 seconds. The **United States** generated the most website visits with 221,871. **Canada** followed with 35,791 visits and the **United Kingdom** was third with 17,476 visits.

The **Special Offers/lodging page** had the most visits on the website with 266,141. Of the pages that individually profiled regions **Cape Cod** (121,766 visits), **Greater Boston** (111,178 visits), **Western MA** (102,639) were the top three. The **Find Lodging** and **Tours Information** pages were both in the top ten visited with 110,455 and 108,183 visits respectively.

Source: MOTT- (Google Analytics)

## **GETAWAY GUIDE Individual and Bulk Distribution: December 2008**

The total number of **2008 Getaway Guides** distributed in **December** was **5,654**. Of these, **1,394** were **individual requests from FARM** (the online fulfillment system), 2,520 went to visitor information centers and there were 165 individual requests for the **Student Guide Kit**. The remaining guides were sent to legislators, AAA travel offices and hotels/motels across the state..

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

## **Lesbian Gay Bisexual Transgender (LGBT): November 2008**

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%)** by the LGBT community.

## **MOTT Updates and Activities from Tony D'Agostino: January 2009**

Please note that the 22<sup>nd</sup> Annual Governor's Conference on Travel & Tourism will be held on March 27, 2009 at The Westin Boston Waterfront Hotel.

Also, don't forget to visit the Boston Globe travel show February 20-22, 2009 at the Seaport World Trade Center in Boston.

Many thanks to MOTT intern Lauren Fernandes for helping pull this edition of TravelStats together.