

Massachusetts

Office of Travel & Tourism

massvacation.com

MOTT TravelStats Newsletter -February 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: January 2009

- During the month of January 2009, Massachusetts state wide lodging room demand (899k) decreased 11% compared to January 2008 (1,009k). The average daily room rate between these two periods decreased by 5.7% to \$112.15 from \$119.10. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 5.6 percentage points to 38.8% from 44.4%. Overall room revenue decreased 16.2% to \$100.8 mil from \$120.2 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CYTD 2009 over same period in CY2008 by 17.6% to \$43.53 from \$52.86. Occupancy was down 12.5% and the room rate decreased by 5.8%.

Massachusetts Hotel Lodging Data

Month of January

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	899	112.15	38.8	\$100.8
2008	1,009	119.10	44.4	\$120.2
2007	955	112.56	42.5	\$107.4

REVPAR- Calendar Year 2009 thru January

Year	(\$'s)	% Change
2009	43.53	-17.6
2008	52.86	10.4
2007	47.89	3.4

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

Room Occupancy Taxes: January 2009 (Fiscal Year 2009)

- For the month of January 2009 (FY09), the net room occupancy tax collections of \$8.8 million decreased by 4.5% over the January 2008 (FY08) collections of \$9.2 million. The January 2008 collections were a 2.2% increase over the January 2007 (FY07) collections of \$9.0 million.
- For the Fiscal Year 2009 thru January 2009, net room occupancy tax collections totalled over \$112.8 million, a 2.4% decrease over the same period of FY08. The FY08 collections of \$115.6 million were 10.9% more than the FY07 collections of \$104.2 million.

Total Room Occupancy Tax Collections

Month of January

Year	\$ (000)	% Change
FY2009	8,806	-4.5
FY2008	9,218	2.2
FY2007	8,996	13.7

FYTD thru January

Year	\$ (000)	% Change
FY2009	112,898	-2.4
FY2008	115,668	10.9
FY2007	104,249	10.3

Source: Mass DOR Monthly Report of Collections and Refunds

Ma Tourism Fund (MTF) Collections: FYTD January 2009 (FY09)

The FY2009 to date thru January 2009 Massachusetts Tourism Fund collections were down 3.7% compared to the collections for the same period in FY2008 (\$27.3 million v. \$28.4 million). The FYTD January 2008 collections were 8.4% higher than the FYTD January 2007 collections (\$28.4 million v. \$26.2 million).

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: January 2009 and CY 2008

Massachusetts' museum and attraction attendance increased 1.1% in the month of January 2009 compared to January 2008 (503,391 visitors v. 497,871 visitors). The total net visitor increase was 5,520 at the 59 institutions reporting visitor data.

For all of calendar year 2008 attendance was up 1.7% to 12.2 million from the 12.0 million attendees in 2007.

(Source: Museum of Science Monthly attendance report)

Logan International Airport Passenger Volume: January 2009

- In **January 2009**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.37 million, a decrease of 11.0% from the January 2008 total of 1.54 million. Calendar year to date data and January data are same (periods).
- The number of **international passenger** arrivals and departures decreased in January 2009 by 13.7% compared to January 2008 to 242,000 from 280,000. Calendar year to date data and January data are same (periods).

Domestic Passenger Volume

January	(000)s	% Change
2009	1,374	-11.0
2008	1,543	2.7
2007	1,655	1.6

International Passenger Volume

January	(000)s	% Change
2009	242	-13.7
2008	280	2.7
2007	273	-2.8

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	1,374	-11.0
2008	1,543	2.7
2007	1,655	1.6

International Passenger Volume

CYTD	(000)s	% Change
2009	242	-13.7
2008	280	2.7
2007	273	-2.8

(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
Massachusetts	6,733,000	34.7%
New York	2,500,000	12.9%
Connecticut	1,997,000	10.3%
New Hampshire	1,022,000	5.3%
Rhode Island	800,000	4.1%
California	631,000	3.3%
Florida	626,000	3.2%
New Jersey	575,000	3.0%
Maine	525,000	2.7%
Virginia	401,000	2.1%
Pennsylvania	386,000	2.0%
Vermont	380,000	2.0%
All Other States	2,803,000	14.5%
All New England States	11,457,000	59.1%
All Mid Atlantic States	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 CY2008

	Visitors to Massachusetts		Percentage change in visitors to U.S. in CY08
	2007 Visitors	2007 SHARE of MARKET	
	(000s)		
ALL OVERSEAS	1,171	4.9%	6.1%
WESTERN EUROPE	684	5.9%	12.0%
Canada	604	3.6%	6.6%
United Kingdom	243	5.4%	1.5%
Germany	85	5.6%	16.9%
Japan	64	1.8%	-8.0%
Ireland	48	9.7%	8.2%
France	47	4.7%	24.7%
Italy	41	6.7%	22.9%
Netherlands	28	5.6%	19.9%
Brazil	28	4.4%	20.3%
Spain	28	5.4%	27.5%
Argentina	18	6.7%	19.2%

Travel to Massachusetts from MOTT target markets in CY2007

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 visit MA have been Canada, the United Kingdom, Germany, France and Italy.

All travel to U.S. from MOTT target markets in CY2008

For **CY2008**, combined overseas and Canadian visitation to the U.S. increased by 6.3% to 44.2 million. Canadian visitation increased by 6.6%, overseas visitation increased 6.1% and, western European visitors to the U.S. increased by 12.0%...suggesting increases to MA also.

Source: Dept of Commerce, OTTI

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>	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: February 2009 & CYTD Thru February 2009

The **MASSVACATION.COM** site had **51,933 unique visits** in **February 2009** (down from 64,549 in February 2008...note that February 2008 had one extra day). Additionally, there were **344,023** page views in February, down from the **384,773** in 2008. The average time on the site was up almost 22% to **4 minutes 8 seconds**.

For CY2009 through February 2009, the total **visits** were **119,587** and the **page views** were **836,812**. The average time on the **site was 4 minutes 9 seconds**. The United States generated the most website visits with **101,168**. Canada followed with **4,490** and the United Kingdom was third with **2,767**. The Mass Value Pass page had the most visits on the website with 50,333. The top three region pages were Boston(13,400 views), Cape Cod (12,000) and Western Mass (11,000).

Source: MOTT- (Google Analytics)

GETAWAY GUIDE Distribution: February 2009

The total number of **2009 Getaway Guides** distributed in **February** was **150,895**. Of these, **11,215 were individual requests from FARM** (the online fulfillment system), and there were **93** individual requests for the **Student Guide Kit**. The remaining guides were sent to Major information centers across the state(32,000), hotels and motels (16,250),international individual requests and bulk to vendors (5,000), trade shows(5,200), AAA Travel Offices (17,800). Another 21,630 Getaway Guides were sent bulk by the printer to repeat customers, pre-order e-mails, lodging and attractions that appear in the Guide and journalists.

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

Lesbian Gay Bisexual Transgender (LGBT): February 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 **LGBT micro site** was launched on January 23 and the site utilization has been fantastic. Since inception there have been 8,870 visits and 25,700 page views.

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

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

Please note that the 22nd Annual Governor's Conference on Travel & Tourism was held on March 27, 2009 at The Westin Boston Waterfront Hotel. The day was very informative and all had a good time. Hope to see you at next year's event.

The 2008 Tourism Industry Report should be posted on the site by April 6, 2009.

Many thanks to MOTT intern Rebecca Andersen for helping pull this edition of TravelStats together.

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