

# Massachusetts

## Office of Travel & Tourism

massvacation.com

### MOTT TravelStats Newsletter -March 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](mailto:Tony.Dagostino@state.ma.us).

#### Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: February 2009

- During the month of February 2009, Massachusetts state wide lodging room demand (955k) decreased 11% compared to February 2008 (1,072k). The average daily room rate between these two periods decreased by 9.5% to \$114.81 from \$126.89. Occupancy rates, which reflect changes in both supply and demand for rooms, decreased by 6.3 percentage points to 45.6% from 51.9%. Overall room revenue decreased 19.4% to \$109.6 mil from \$136.0 mil.
- REVPAR, which is a function of occupancy rate and room rate, decreased for CYTD 2009 over same period in CY2008 by 19.2% to \$47.70 from \$59.02. Occupancy was down 12.3% and the room rate decreased by 7.8%.

#### Massachusetts Hotel Lodging Data

##### Month of February

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2009	955	114.81	45.6	\$109.6
2008	1,072	126.89	51.9	\$136.0
2007	1,011	119.45	49.8	\$120.7

##### REVPAR- Calendar Year 2009 thru February

Year	(\$'s)	% Change
2009	47.70	-19.2
2008	59.02	10.5
2007	53.40	3.2

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

#### Room Occupancy Taxes: February 2009 (Fiscal Year 2009)

- For the month of February 2009 (FY09), the net room occupancy tax collections of \$6.7 million decreased by 19.0% from the February 2008 (FY08) collections of \$8.2 million. The February 2008 collections were a 17.3% increase over the February 2007 (FY07) collections of \$7.0 million.
- For the Fiscal Year 2009 thru February 2009, net room occupancy tax collections totalled over \$119.5 million, a 3.5% decrease from the same period of FY08. The FY08 collections of \$123.9 million were 11.4% more than the FY07 collections of \$111.3 million.

#### Total Room Occupancy Tax Collections

##### Month of February

Year	\$ (000)	% Change
FY2009	6,668	-19.0
FY2008	8,236	17.3
FY2007	7,023	4.7

##### FYTD thru February

Year	\$ (000)	% Change
FY2009	119,566	-3.5
FY2008	123,905	11.4
FY2007	111,271	9.7

Source: Mass DOR Monthly Report of Collections and Refunds

## Ma Tourism Fund (MTF) Collections: FYTD February 2009 (FY09)

The FY2009 to date thru February 2009 Massachusetts Tourism Fund collections were down 4.4% compared to the collections for the same period in FY2008 (\$28.9 million v. \$30.3 million). The FYTD February 2008 collections were 8.2% higher than the FYTD February 2007 collections (\$30.3 million v. \$28.0 million).

Source: Mass DOR Monthly Report of Collections and Refunds

## Museum and Attraction Attendance: February 2009 and CYTD 2009

Massachusetts' museum and attraction attendance increased 11.1% in the month of February 2009 compared to February 2008 (685,654 visitors v. 617,289 visitors). The total net visitor increase was 68,365 at the 59 institutions reporting visitor data.

For all of calendar year 2009 thru February attendance was up 6.6% to 1.2 million from the 1.1 million attendees during the same period in 2008.

(Source: Museum of Science Monthly attendance report)

## Logan International Airport Passenger Volume: February 2009

- In **February** 2009, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1.5 million, a decrease of 11.1% from the February 2008 total of 1.6 million. Calendar year to date thru February the total was 2.8 million down 11%.
- The number of **international passenger** arrivals and departures decreased in February 2009 by 17% compared to February 2008 to 227,000 from 274,000. Calendar year to date totals thru February are down 15.3% to 469,000 from 553,000.

Domestic Passenger Volume

February	(000)s	% Change
2009	1,459	-11.1
2008	1,641	-0.3
2007	1,646	-0.4

International Passenger Volume

February	(000)s	% Change
2009	227	-17.0
2008	274	6.8
2007	256	-4.3

Domestic Passenger Volume

CYTD	(000)s	% Change
2009	2,832	-11.0
2008	3,184	-3.6
2007	3,301	0.6

International Passenger Volume

CYTD	(000)s	% Change
2009	469	-15.3
2008	553	4.7
2007	529	-3.5

(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 CY2008**

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

**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 and January 2009**

For **CY2008**, combined overseas and Canadian visitation to the U.S. increased by 6.3% to 44.2 million compared to CY2007. Canadian visitation increased by 6.6% and Western European visitors to the U.S. increased by 12.0%...suggesting increases to MA also.

In January 2009, visitation from Canada to U.S. dropped 12.4%, while WE visits declined 11.4% from January 2008.

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>	<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: March 2009 & CYTD Thru March 2009

The **MASSVACATION.COM** site had **73,855 unique visits** in **March 2009**, up 15% from 64,361 in March 2008. Additionally, there were **409,219 page views** in March, up 11% from the **369,736** in 2008. The average time on the site was up almost 10% to **4 minutes 12 seconds**.

For CY2009 through March 2009 (Q1), the total **visits** were **193,442** and the **page views** were **1,246,031**. The average time on the **site was 4 minutes 10 seconds**. The United States generated the most website visits with **163,279**. Canada followed with **8,036** and the United Kingdom was third with **4,448**.

The **Mass Value Pass** page had the most visits during the first quarter with 76,974. The top three region pages were Boston (20,383 views), Cape Cod (19,325) and Western Mass (16,345).

Source: MOTT- (Google Analytics)

**GETAWAY GUIDE Distribution: March 2009**

The total number of **2009 Getaway Guides** distributed in **March** was **233,024**. Of these, **8,224** were **individual requests from FARM** (the online fulfillment system). The remaining guides were sent to major information centers across the state (7,350), hotels and motels (1,100), and 1,200 were sent to AAA info centers.

Additionally, there were **210,000** Getaway Guides distributed with the New York Times Sunday March 15<sup>th</sup>, 2009 edition.

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

**Lesbian Gay Bisexual Transgender (LGBT): March 2009**

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.

The **LGBT micro site** was launched on January 23 and the site utilization has been fantastic. Since inception thru March 2009 there have been 22,475 visits and 62,641 page views.

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

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

Survey results from the 22<sup>nd</sup> Annual Governor's Conference on Travel & Tourism held on March 27, 2009 at The Westin Boston Waterfront Hotel have been tabulated and ..... the respondents liked the one day format, were extremely happy that Governor Patrick and Secretary Bialecki participating and were also very satisfied with the morning and afternoon panel sessions.

Please note that the 2008 Tourism Industry Report is now on the website Research page.

