



**Office of Travel & Tourism**

**MOTT TravelStats Newsletter - February 2015**

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: January 2015**

- During the month of January 2015, Massachusetts statewide lodging room demand (1,177.0k) increased 2.9% compared to January 2014 (1,143.5k). The average daily room rate between these two periods increased by 4.6% to \$131.67 from \$125.87. Occupancy rates, which reflect changes in both supply and demand for rooms increased 1.0 percentage points to 51.3% from 50.3%. Overall room revenue increased 7.7% to \$155.0 mil from \$143.9 mil.
- REVPAR, which is a function of occupancy rate and room rate, increased for CYTD January over same period last year by 6.7% to \$67.53 from \$63.26. Occupancy was up 2.0% and the room rate increased 4.6%.

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

**Massachusetts Hotel Lodging Data**

**Month of January**

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2015	1,177.0	131.67	51.3	155.0
2014	1,143.5	125.87	50.3	143.9
2013	1,091.6	120.78	47.9	131.8

**REVPAR- January 2015**

Year	(\$'s)	% Change
2015	67.53	6.7
2014	63.26	9.3
2013	57.88	3.4

**State Room Occupancy Taxes: January 2015 & FY 2015 thru Jan.**

- For the month of January 2015 (FY15), the net room occupancy tax collections of \$10.4 mil increased by 7.6% from the January 2014 (FY14) collections of \$9.7 mil. The January 2014 collections were a 5.8% decrease from the January 2013 (FY13) collections of \$10.3 mil.
- For FY2015 YTD, the net room occupancy tax collections of \$149.6 mil increased by 9.9% from the January 2014 (FY14) collections of \$136.1 mil. The January 2014 collections were a 6.7% increase from the January 2013 (FY13) collections of \$127.6 mil.

Source: Mass DOR Monthly Report of Collections and Refunds

**State Room Occupancy Tax Collections**

**Month of January**

Year	\$ (000)	% Change
FY2015	10,398.5	7.6%
FY2014	9,660.7	-5.8%
FY2013	10,252.2	8.4%

**FYTD thru January**

Year	\$ (000)	% Change
FY2015	149,551.4	9.9%
FY2014	136,083.9	6.7%
FY2013	127,551.0	6.3%

**Local Option Room Occupancy Taxes: January 2015 & FY 2015 thru January**

- **For the month of January 2015 (FY15)**, the local option room occupancy tax collections of \$8.4 mil increased by 8.1% from the January 2014 (FY14) collections of \$7.7 mil. The January 2014 collections were a 4.4% decrease from the January 2013 (FY13) collections of \$8.1 mil. (Note: recent law allows local option tax rate increases in communities).
- **For FY2015 YTD**, local option room occupancy tax collections totalled \$120.8 mil, a 10.1% increase from FY2014 total of \$109.7 mil. The FY2014 collections were 7.1% more than the FY2013 collections of \$102.5 mil. (See note above).

Source: Mass DOR Monthly Report of Collections and Refunds

**Local Room Occupancy Tax Collections**

Month of January

Year	\$ (000)	% Change
FY2015	8,362.0	8.1%
FY2014	7,736.7	-4.4%
FY2013	8,087.7	7.6%

2015 FYTD thru Jan

Year	\$ (000)	% Change
FY2015	120,829.5	10.1
FY2014	109,730.3	7.1%
FY2013	102,484.8	7.1%

**Ma Tourism Fund (MTF) Collections thru January: FYs 2015 and 2014**

The FY2015 year to date thru January 2015 the MTF collections totalled \$35.0 million which was a 9.0% increase from the \$32.1 million collected during the same period in FY2014.

Source: Mass DOR Monthly Report of Collections and Refunds

**Museum and Attraction Attendance: January 2015 and CYTD 2015**

Massachusetts's museum and attraction attendance decreased 2.6% in the month of January 2015 compared to January 2014 (509,646 visitors vs. 523,029 visitors). The total net visitor decrease was 13,383 visitors at the 73 sites reporting visitor data.

For calendar year 2015, attendance was down 2.6% to 509.7 thousand from the 523.0 thousand visits during the same period in CY2014, a decrease of 13.4k visitors.

(Note: 73 sites reported data for January, 2015.)

(Source: NEMA Monthly attendance report)

**Logan International Airport Passenger Volume: January 2015 and CYTD 2015**

- In **January 2015**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 1,756.3 thousand, an increase of 2.1% from January 2014 totaling 1,719.7 thousand.
- The CYTD 2015 total was 1.756 million, up 2.1% from the 1.719 million in CY2014.
- The number of **international passenger** arrivals and departures increased in January 2015 by 19.1% compared to January 2014 to 347k from 291k.
- The CYTD 2015 totals were up 19.1% to 347,000 from 291,000 the prior year.

**Domestic Passenger Volume**

January	(000)s	% Change
2015	1,756.3	2.1
2014	1,719.7	-0.3
2013	1,724.2	1.5

**International Passenger Volume**

January	(000)s	% Change
2015	347	19.1
2014	291	1.4
2013	287	6.4%

**Domestic Passenger Volume**

CYTD January	(000)s	% Change
2015	1,756.3	2.1
2014	1,719.7	-0.3
2013	1,724.2	1.5

**International Passenger Volume**

CYTD January	(000)s	% Change
2015	347	19.1
2014	291	1.4
2013	287	6.4%

(Source: Massport)

## Domestic Visitation to Massachusetts FY 2014:

Domestic visitors' origin, number of person trips (visits) and percentage of total trips.

<u>Origin State</u>	<u>Person trips</u>	<u>Share of all trips</u>
Massachusetts	7,250,000	33.1%
New York	2,412,000	11.0%
Connecticut	2,211,500	10.1%
New Hampshire	1,541,500	7.0%
Rhode Island	618,000	2.8%
California	826,500	3.8%
Florida	519,500	2.4%
New Jersey	991,500	4.5%
Maine	1,050,000	4.8%
Pennsylvania	490,000	2.0%
Vermont	428,000	2.2%
<b>Total</b>	<b>18,338,500</b>	<b>83.9%</b>
All Other States	3,535,500	16.1%
All New England States	13,099,500	59.7%
All Mid-Atlantic States	3,893,500	16.8%

The total domestic trips to Massachusetts in FY2014 were 21.9 million. The primary trip purpose in FY2014 was Visiting Friends and/or Relatives (47.2%), the top activities were attending a family/social event followed by Shopping (18.1%), and almost 70% of visitors arrived in their own vehicle. Of the visitors that stayed overnight, nearly 46% 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 , MOTT TRAVEL INDUSTRY REPORT CY2014

**International Visitors to MA CY2013 & CY2014 thru December to U.S.**

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u>  MA share of U.S. Market in 2013	<u>Visitors to U.S.</u>
	2013 Visitors (000s)	Change from 2012		CYTD 2014 thru December v. CYTD 2013 thru December Change
ALL OVERSEAS	1,339	-5.8%	4.5%	7.4%
WESTERN EUROPE	658	-3.7%	5.6%	8.4%
Canada	691	1.9%	3.0%	-1.8%
United Kingdom	222	0%	5.9%	3.6%
China	150	7.9%	10.2%	21.1%
Germany	124	3.3%	6.6%	2.7%
France	77	11.6%	5.3%	8.0%
Japan	70	42.9%	1.9%	-4.0%
Italy	57	5.6%	6.8%	11.3%
India	45	-10.0%	6.2%	11.9%
Netherlands	17	-34.6%	2.8%	4.5%
Brazil	52	-3.7%	2.9%	9.9%
Spain	38	40.7%	6.3%	12.9%
Australia	52	-20.0%	4.6%	5.9%

**Travel to Massachusetts from MOTT target markets in CY2013**

OVERSEAS visits to Massachusetts during CY2013 totaled just over 1.3 million. This was a decrease of 5.8% from CY2012. Historically, the top four origin countries to visit MA were Canada, the UK, China and Germany.

**Massachusetts market share of Overseas and Canadian visitation for CY2013**

For CY2013, Massachusetts captured 4.5% of all overseas travel to the U.S. Canadian visitation to MA totaled 691k in CY2013.

**Travel to U.S. from MOTT target markets for CYTD 2014 thru December, 2014**

Travel to U.S. for CYTD thru December was down 1.8% from Canada, which is Massachusetts' number one international visitor origin market. Visits to U.S. from Western Europe increased by 8.4%, from Japan down 4.0%, and up 21.1% from China. All overseas visitations to the U.S. were up 7.4% for CY2014 over CY2013.



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## Direct Economic Impact of Travel and Tourism, CY2013

Domestic and International traveler expenditures totaled \$17.7 Billion in MA during 2013. Domestic traveler spending totaled \$15.4 Billion, while international traveler spending totaled \$2.3 Billion. Travel is comprised of several sub industries as noted below.

Travel Expenditures	<u>Domestic</u>		<u>International</u>		<u>Total</u>	
Public Transportation	\$5,263.6	32.8%	\$300.2	12.2%	\$5,564.1	30.1%
Auto Transportation	2,364.8	14.8%	35.4	1.4%	2,400.4	13.3%
Lodging	3,165.4	20.8%	866.3	35.2%	4,194.3	22.7%
Foodservice	3,135.0	19.6%	462.8	18.8%	3,597.9	19.5%
Entertainment & Recreation	924.6	5.8%	194.3	7.9%	1,119.0	6.1%
General Retail Trade	1,008.3	6.3%	598.8	24.4%	1,607.2	8.7%
<b>Total</b>	<b>\$16,024.1</b>	<b>100.00%</b>	<b>\$2,457.7</b>	<b>100.00%</b>	<b>\$18,482.8</b>	<b>100.00%</b>

### Economic Impact of Domestic Travel on Massachusetts Counties, 2013

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax	Local Tax
				Receipts (\$ Millions)	Receipts (\$ Millions)
Barnstable	\$931.82	\$236.69	8.79	\$39.26	\$56.04
Berkshire	367.35	90.05	3.48	17.89	10.53
Bristol	461.56	90.81	3.08	23.57	8.93
Dukes	128.29	31.26	1.21	4.79	7.35
Essex	816.34	180.59	6.44	42.05	20.94
Franklin	58.88	10.23	0.37	3.13	1.88
Hampden	484.89	104.64	3.19	26.03	9.73
Hampshire	124.06	25.80	0.88	6.47	3.32
Middlesex	2,324.05	602.12	20.09	125.84	62.66
Nantucket	157.77	32.86	1.04	4.63	5.45
Norfolk	1,007.39	294.18	9.81	52.32	22.20
Plymouth	539.45	103.71	3.70	25.71	25.12
Suffolk	7,819.17	1,427.80	43.61	199.64	144.26
<u>Worcester</u>	<u>803.01</u>	<u>152.92</u>	<u>5.46</u>	<u>41.36</u>	<u>17.91</u>
<b>Statewide</b>	<b>\$16,024.05</b>	<b>\$3,383.64</b>	<b>111.14</b>	<b>\$612.71</b>	<b>\$396.33</b>

Source: USTA Economic Impact of Travel on MA Counties, 2013

## **MASSVACATION.COM Activity: February 2015 and Calendar Year 2014**

The **MASSVACATION.COM** site had **174,510 sessions** in February of 2015, down 29% from the **245,901** in February, 2014. Additionally, there were **401,748 page views**, down 28% from the **559,233** the prior February. The average time on the site went down 8.8% to **1 minute 33 seconds**. The most visited page was **Explore** with 90,778 views and the most visited region page was **Cape Cod and the Islands** with 6,922 views. **Visits** originating in the U.S. decreased by 32% to 155,931. Visits from Canada decreased 8.2% to 3,924, visits from the U.K. decreased 4.8% to 2,460, and visits originating in Germany increased 4.8% to 1,258.

For **CY 2015** through **February**, the total **visits** were 383,428, **down 8.3% from the 418,270 for the same period in CY2014**. The **page views were down 12.3% to 891,465** from **1,016,497**. The average time on the site went down 8.7% to 1 minute 41 seconds. The **United States** generated the most website visits with **341,403** (down 11.2%). **Canada** followed with **8,267** (down 5.9%) and the **United Kingdom** was third with **5,647** (up 3.4%) The **Explore** page had the most views **with 189,347**. The top region page was **Cape Cod and the Islands with 17,525** views.

Source: MOTT- (Google Analytics)

## **Lesbian Gay Bisexual Transgender (LGBT) data: February 2015 & CYTD 2015**

In February 2015 there were **2,087** visits (up 33.4%) and **3,557** page views (up 25%). The top 3 information pages were “Marriage”, “LGBT resources” and “Things to do”. The top 2 referral sources in February were m.facebook.com and massvacation.com.

For Calendar Year To Date 2015 through February, there were **4,728** visits (up 48.5%) and **8,127** page views (up 34.8%). **m. Facebook.com** and **massvacation .com** were the top 2 referral sources. **Marriage, Things to do and Provincetown-year-round** were the top 3 pages viewed

(Source: MOTT- (Google Analytics))

## **MOTT Updates and Activities from Tony D’Agostino... March, 2015**

Please be sure to check out the MASSVACATION.COM site for great travel and tourism related statewide data and travel related activities. A big thanks to Devon Follett, Marketing Intern here at MOTT, for her help pulling this edition together.