



MOTT TravelStats Newsletter – December, 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.

Hotel Demand, Rate, Occupancy, Revenue, and REVPAR Data: November 2015

- During the month of November 2015, Massachusetts statewide lodging room demand (1,456.0K) increased 0.8% compared to November 2014 (1,444.9). The average daily room rate between these two periods increased by 0.2% to \$164.03 from \$163.64. Occupancy rates, which reflect changes in both supply and demand for rooms decreased 0.5 percentage points to 63.1% from 63.6%. Overall room revenue increased 1.0% to \$238.8 mil from \$236.4 mil.
- REVPAR CYTD, which is a function of occupancy rate and room rate, increased for CYTD October over same period last year by 8.2% to \$127.38 from \$117.75. Occupancy was up 2.1% and the room rate increased 6.0%.

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 November

Year	DEMAND (000's)	RATE (\$'s)	Occupancy Rate %	REVENUE (millions)
2015	1,456.0	164.03	63.1	238.8
2014	1,444.9	163.64	63.6	236.4
2013	1,420.9	147.23	62.9	209.1

REVPAR CYTD November 2015

Year	(\$'s)	% Change
2015	127.38	8.2
2014	117.75	9.7
2013	107.33	5.0

State Room Occupancy Taxes: November 2015 & FY 2016 thru November

- For the month of November 2015 (FY16), the net room occupancy tax collections of \$25.8 mil increased by 8.5% from the November 2014 (FY15) collections of \$23.8 mil. The November 2014 collections were a 1.7% increase from the November 2013 (FY14) collections of \$23.3 mil.
- For FY2016 YTD, the net room occupancy tax collections of \$133.4 mil increased by 9.0% from the November 2014 (FY15) collections of \$122.5 mil. The November 2014 collections were a 9.9% increase from the November 2013 (FY14) collections of \$111.4 mil.

Source: Mass DOR Monthly Report of Collections and Refunds

State Room Occupancy Tax Collections

Month of November

Year	\$ (000)	% Change
FY2016	25,769.9	8.5
FY2015	23,753.1	1.7
FY2014	23,347.1	16.5

FYTD thru November

Year	\$ (000)	% Change
FY2016	133,436.7	9.0
FY2015	122,461.6	9.9
FY2014	111,437.8	7.9

Local Option Room Occupancy Taxes: November 2015 & FY 2016 thru November

- For the month of **November 2015 (FY16)**, the local option room occupancy tax collections of \$20.7 mil increased by 8.7% from the November 2014 (FY15) collections of \$19.1 mil. The November 2014 collections were a 2.4% increase from the November 2013 (FY14) collections of \$18.6 mil. (Note: recent law allows local option tax rate increases in communities).
- **For FY2016YTD**, local option room occupancy tax collections totalled \$109.1 mil, a 9.9% increase from FY2015 total of \$99.3 mil. The FY2015 collections were 9.8% more than the FY2014 collections of \$90.2 mil. (See note above).

Source: Mass DOR Monthly Report of Collections and Refunds

Local Room Occupancy Tax Collections

Month of November

Year	\$ (000)	% Change
FY2016	20,728.7	8.7
FY2015	19,062.1	2.4
FY2014	18,608.1	16.2

2015 FYTD thru November

Year	\$ (000)	% Change
FY2016	109,061.1	9.9
FY2015	99,269.6	9.8
FY2014	90,242.0	8.3

Ma Tourism Fund (MTF) Collections thru November: FYs 2016 and 2015

- The FY2016 year to date thru November 2015 the MTF collections totalled \$31.4 million which was a 7.9% increase from the \$29.1 million collected during the same period in FY2015.

Source: Mass DOR Monthly Report of Collections and Refunds

Museum and Attraction Attendance: November 2015 and CYTD 2015

- Massachusetts's museum and attraction attendance decreased by 0.0% in the month of November 2015 compared to November 2014 (743,672 visitors vs. 743,763 visitors). The total net visitor decrease was 91 visitors at the 68 sites reporting visitor data.
- For calendar year 2015 through November, attendance was down 3.3% to 9,747,675 from the 10,084,131 visits during the same period in CY2014, a decrease of 336,456 visitors. (Note: 68 sites reported data for November , 2015.)

Source: NEMA Monthly attendance report

Logan International Airport Passenger Volume: November 2015 and CYTD 2015

- In **November 2015**, the number of **domestic passenger** arrivals and departures from Logan International Airport totaled 2,254.0 k an increase 8.7% from November 2014 total of 2,073.6 k.
- The CYTD 2015 total was 25.7 million, up 4.9% from the 24.5 million in CY2014 through the same period.
- The number of **international passenger** arrivals and departures increased in November 2015 by 11.8% compared to November 2014 to 381.1 k from 340.9 k.
- The CYTD 2015 totals were up 10.5% to 5.1 mil from 4.6 mil the prior year through the same period.

Domestic Passenger Volume

November	(000)s	% Change
2015	2,254.0	8.7
2014	2,073.6	3.5
2013	2,003.0	-0.2

International Passenger Volume

November	(000)s	% Change
2015	381.1	11.8
2014	340.9	19.2
2013	286.0	-4.5

Domestic Passenger Volume

CYTD November	(000)s	% Change
2015	25,698.3	4.9
2014	24,499.8	4.0
2013	23,564.5	2.9

International Passenger Volume

CYTD November	(000)s	% Change
2015	5,108.7	10.5
2014	4,623.5	9.6
2013	4,220.3	3.4

Source: Massport

Domestic Visitation to Massachusetts FY 2015:

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	6,954,000	30.8%
New York	2,595,500	11.5%
Connecticut	2,286,500	10.1%
New Hampshire	1,739,500	7.7%
Rhode Island	1,024,500	4.5%
California	788,500	3.5%
Florida	684,000	3.0%
New Jersey	735,000	3.3%
Maine	779,000	3.4%
Pennsylvania	668,000	3.0%
Vermont	346,500	1.5%
Total	18,700,000	82.3%
All Other States	4,076,000	17.7%
All New England States	13,129,500	58.1%
All Mid-Atlantic States	3,998,500	17.7%

The total domestic trips to Massachusetts in FY2015 were 22.7 million. The primary trip purpose in FY2015 was Visiting Friends and/or Relatives (52%), the top activities were attending a family/social event (29%) followed by shopping (19%), and almost 71% of visitors arrived in their own vehicle. Of the visitors that stayed overnight, nearly 44% 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 CY2015

International Visitors to MA CY2014& CY2015 thru June to U.S.

	Visitors to Massachusetts		Visitors to <u>Massachusetts</u> MA share of U.S. Market in 2014	<u>Visitors to U.S.</u>
	2014 Visitors (000s)	Change from 2013		CYTD 2015 thru June v. CYTD 2014 thru June Change
ALL OVERSEAS	1,514	9.9%	4.4%	8.7%
WESTERN EUROPE	690	4.2%	5.4%	10.4%
Canada	n/a	n/a	n/a	-6.1%
United Kingdom	183	-16.4%	4.6%	13.8%
China	177	55.3%	8.1%	18.2%
Germany	93	-20.5%	4.7%	13.5%
France	81	15.1%	5.0%	4.3%
Japan	75	25.0%	2.1%	2.2%
Italy	65	30.0%	7.0%	5.6%
India	65	16.1%	6.8%	18.7%
Netherlands	36	71.4%	5.8%	12.8%
Brazil	41	-16.3%	1.8%	5.3%
Spain	48	65.5%	6.9%	7.5%
Australia	63	18.9%	4.9%	10.6%

Travel to Massachusetts from MOTT target markets in CY2014

- OVERSEAS visits to Massachusetts during **CY2014** totaled just over **1.5 million**. This was an increase of 9.9% from **CY2013**. **Historically**, the top four origin countries to visit MA have been Canada, the UK, China and Germany.

Massachusetts market share of Overseas and Canadian visitation for CY2014

- For CY2014, Massachusetts captured 4.4% of all overseas travel to the U.S... All Canadian visitation to MA totaled 691k in CY2013.

Travel to U.S. from MOTT target markets for CYTD 2015 thru June

- Travel to U.S. for CYTD thru June was down 6.1% from Canada, which is Massachusetts’ number one international visitor origin market. Visits to U.S. from Western Europe increased by 12.8%, from Japan up 2.2, and up 18.2% from China. All overseas visitations to the U.S. were up 8.7%.

Source: U.S. Dept. of Commerce, OTTI

Direct Economic Impact of Travel and Tourism, CY2014

- Domestic and International traveler expenditures totaled \$19.5 Billion in MA during 2014. Domestic traveler spending totaled \$16.85 Billion, while international traveler spending totaled \$2.65 Billion. Travel is comprised of several sub industries as noted below.

	<u>Domestic</u>		<u>International</u>		<u>Total</u>	
Travel Expenditures						
Public Transportation	\$5,544.7	32.9%	\$312.2	11.8%	\$5,856.9	30.0%
Auto Transportation	2,401.7	14.3%	37.2	1.4%	2,438.9	12.5%
Lodging	3,601.7	21.4%	967.7	36.5%	4,569.3	23.4%
Foodservice	3,288.9	19.5%	495.4	18.7%	3,784.3	19.4%
Entertainment & Recreation	964.1	5.6%	205.1	7.7%	1,169.2	6.0%
General Retail Trade	1,045.3	6.2%	636.7	24.0%	1,682.0	8.6%
Total	\$16,846.4	100.00%	\$2,654.3	100.00%	\$19,500.7	100.00%

Economic Impact of Domestic Travel on Massachusetts Counties, 2014

<u>County</u>	<u>Expenditures</u> (\$ Millions)	<u>Payroll</u> (\$ Millions)	<u>Employment</u> (Thousands)	<u>State Tax</u> <u>Receipts</u> (\$ Millions)	<u>Local Tax</u> <u>Receipts</u> (\$ Millions)
Barnstable	\$956.6	\$240.0	8.79	\$40.3	\$57.5
Berkshire	386.9	93.8	3.5	18.8	11.1
Bristol	465.1	92.0	3.1	23.9	9.1
Dukes	133.3	32.1	1.2	5.0	7.6
Essex	861.8	192.2	6.7	44.7	21.9
Franklin	61.0	10.7	0.4	3.3	2.0
Hampden	489.0	106.4	3.2	26.5	9.9
Hampshire	125.3	26.1	0.9	6.6	3.4
Middlesex	2,457.8	633.0	20.6	133.2	65.3
Nantucket	162.2	33.7	1.0	4.8	5.6
Norfolk	1,052.	308.2	10.0	55.3	23.2
Plymouth	563.3	107.9	3.8	26.9	25.9
Suffolk	8,306.9	1,508.7	44.7	213.6	154.9
<u>Worcester</u>	<u>824.7</u>	<u>155.4</u>	<u>5.5</u>	<u>42.9</u>	<u>18.7</u>
Statewide	\$16,846.4	\$3,540.2	113.3	\$645.8	\$416.1

Source: USTA Economic Impact of Travel on MA Counties, 2014

MASSVACATION.COM Activity: December 2015 and CYTD December, 2015

- The MASSVACATION.COM site had **101,210 sessions** in December of 2015, down 45.1% from the **185,953** in December, 2014. Additionally, there were **244,651 page views**, down 39.5% from the **404,217** the prior December. The average time on the site went **down 15.5%** to **1 minute and 34 seconds**. The most visited page was **Explore** with 81,574 views and the most visited region page was **Western Massachusetts** with 9,353 views. **Visits** originating in the U.S. decreased by 44.6% to 92,586. Visits from Canada decreased 59.7% to 1,554, visits from Russia increased 179.4% to 799 and visits from the U.K decreased 37.3% to 1,211.
- For **CY 2015** through **December**, the total **visits** of 2,614,731 were down 1.6% from the 2,656,297 for the same period in CY2014. The **page views** were down 6.3% to 6,631,956 from 7,079,650. The average time on the site went down 16.2% to 1 minute 47 seconds. The **United States** generated the most website visits with 2,344,719 (down 0.87%). **Canada** followed with 77,436 (down 34.2%) and the **United Kingdom** was third with 29,321 (down 12.7%) The **EXPLORE** page had the most views with 1,702,574. The top region page was **Cape and the Islands** with 182,714 views.
Source: MOTT- (Google Analytics)

LGBTmassvacation.com web site data: December 2015 & CYTD 2015

- In December 2015 there were **2,722** visits (up 3.0%) and **4,223** page views (down 4.4%) to lgbtmassvacation.com. The top 3 information pages were “celebrating the new year in Provincetown!”, “LGBT Resources”, and “things to do”. The top 2 referral sources in December were **massvacation.com** and **seeplymouth.com?**. The **United States** generated the most website visits 2,514 and the **United Kingdom** followed with 23 and **Canada** was third with 15. **Within the United States, Massachusetts generated the most website visits with 1,357 followed by New York with 251 and Michigan with 106.**
- For Calendar Year to Date 2015 through December, there were **34,358** visits (up 47.8%) and **57,317** page views (up 32.8%). **m.facebook.com** and **massvacation .com** were the top 2 referral sources. **Things to do, LGBT Resources, and Marriage** were the top 3 information pages viewed. The **United States** generated the most website visits with 30,445. **Canada** followed with 756 visits and the **United Kingdom** was third with 378 visits. **In the United States, Massachusetts generated the most website visits with 14,670, followed by New York with 4,114 and Connecticut with 1,327.**

Source: MOTT- (Google Analytics)

MOTT Updates and Activities from Tony D’Agostino... February, 2016

- 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 Alexis Podedworny, Marketing Intern here at MOTT, for her help pulling this edition together.