MASSACHUSETTS

Massachusetts Office of Travel & Tourism

2023 ANNUAL REPORT

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REPORT DATA

Data in this report are the most current available and reported on a calendar-year basis, unless otherwise specified. Data are based on all travel – domestic and international, leisure and business, unless otherwise specified. A visitor is defined as someone who travels at least 50 miles one way or stays overnight in paid accommodations.

NOTE ON INTERNATIONAL RESULTS

The basis for estimating international traveler volume to the United States and Massachusetts is the U.S. Department of Commerce I-94 survey program.

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Top Numbers

ECONOMIC IMPACT

- Direct spending by domestic and international visitors totaled $24.2 billion in Calendar Year (CY) 2022 (p. 4).
- Visitor expenditures supported 131,200 jobs in CY 2022 and $6.0 billion in wages and salaries (p. 4).
- Visitor expenditures generated $1.9 billion in Massachusetts state and local tax revenue in CY 2022 (p. 4).
- Each dollar spent by a visitor in CY 2022 generated 4.8 cents in state tax receipts and 3.0 cents in local taxes (p. 4).
- State hotel room occupancy tax collections totaled $388 million and local option room occupancy tax collections totaled $330.5 million in FY2023 (p. 6).
- Domestic visitors accounted for approximately 90% of all visitor spending. International visitor spending accounted for approximately 10% (p. 4)

DOMESTIC & INTERNATIONAL VISITORS

- In Calendar Year (CY) 2022, 54% of all domestic person trips originated in New England, and 23% from the mid-Atlantic states (NY, NJ, and PA) (p. 12).
- Visiting friends and relatives is the most frequently reported primary trip purpose (49%) (p. 13).
- Travel by personal car is the dominant mode of transportation (75%) (p. 13).
- 54% of the domestic visitors who spent at least one night in Massachusetts reported staying in a hotel, motel, or bed and breakfast (p. 13).
- In Calendar Year 2022, Massachusetts hosted 19.5 million domestic visitors.
- In Calendar Year 2022, Massachusetts hosted 810,000 international visitors (Overseas, and Mexican & Canadian air visitors).

Economic Impact

Direct Economic Impact of Travel on Massachusetts, 2022-2019					
Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
2022	$24,197.6	$5,968.5	131.2	$1,170.5	$729.6
2021	$16,473.5	$4,783.2	110.8	$823.5	$496.6
2020	$9,965.2	$4,293.1	102.1	$568.7	$311.2
2019	$24,871.1	$6,090.3	157.3	$1,040.2	$641.6

Source: USTA, Tien Tian LLC, Domestic plus International

Direct expenditures by domestic and international visitors to Massachusetts totaled $24.2 billion in CY 2022, a 46.8% increase from CY 2021.

Massachusetts' 2022 direct expenditures represented a 2% share of all U.S. direct expenditures.

Domestic visitors spent $22 billion in CY 2022, 90% of all spending; international visitors, $2.2 billion, or 10%.

In CY 2022, domestic spending increased 40.2%; international increased 174.1%.

Visitor spending supported 131,200 full-time, part-time, and seasonal jobs, an increase of 18.4% from CY 2021, and payroll of $5.9 billion, a 24.7% increase.

The state received $1.2 billion in revenues through the state sales tax, and taxes on travel-related personal and corporate income, a 42.1% increase from CY 2021. Local community revenue totaled $729.6 million in sales, property, and excise tax revenue, a 46.9% increase.

Domestic and International Direct Expenditures by Industry Sector, CY2022				
2022 Expenditures	Domestic ($ Millions)	International ($ Millions)	Total ($ Millions)	% of Total
Public Transportation	5,874.5	228.3	6,102.8	25.22%
Auto Transportation	3,193.6	32.9	3,226.5	13.33%
Lodging	6,133.2	930.2	7,063.4	29.19%
Foodservice	4,633.8	431.0	5,064.8	20.93%
Entertainment & Recreation	890.1	166.4	1,056.5	4.37%
General Retail Trade	1,225.5	458.1	1,683.6	6.96%
2022 Totals	**21,950.6**	**2,246.9**	**24,197.6**	**100%**
Percentages	**90%**	**10%**	**100%**	**-**
2021 Totals	**15,653.7**	**819.8**	**16,473.5**	**-**
Percentages	**95%**	5%	**100%**	**-**

Source: USTA, Tien Tian LLC, Domestic plus International

Economic Impact

THE MULTIPLIER IMPACT

Visitors' direct expenditures have a multiplier impact on the Massachusetts economy through indirect and induced spending. Indirect spending results from Massachusetts' travel-related businesses purchasing goods and services within Massachusetts. Induced spending results from employees of travel-related businesses spending part of their income in MA. This multiplier impact is measured for expenditures, earnings, and employment. In CY 2022, the total impact of all travel spending was $36.3 billion, total employment reached 210,000, with $10.8 billion in earnings.

Multiplier Impact of Direct Spending, CY2021

Impact Measure	Direct Impact	Indirect & Induced Impact	Total Impact
Spending (Millions)	$24,197.6	$12,098.8	$36,296.3
Earnings (Millions)	$5,968.5	$4,834.5	$10,803.0
Employment (Thousands)	131.2	78.7	209.9
Indirect impact — travel industry operators purchasing goods and services in MA			
Induced impact — employees of businesses and suppliers spending part of their earnings in MA			

Source: USTA, Tien Tian LLC, Domestic plus International

Massachusetts Lodging Performance

Lodging performance during CY 23 far outpaced the rest of the United States.

Lodging Performance 2023

	Room Revenue (millions)	Occ	ADR	RevPAR
United States	189,384.8	0.6	8.1	8.7
New England	9,130.0	4.7	11.2	16.4
Massachusetts	317.5	6.3	13.3	20.4
New York	13,508.6	5.3	8.5	14.3
New Jersey	3,343.7	12.3	23.7	38.9
Pennsylvania	4,471.8	3.6	10.8	14.8

Source: MA DOR (state totals include convention center collections)

In FY 2023, state room occupancy tax collections (including convention centers) totaled $388 million, a 31.4% increase from FY 2022 and a 212.4% increase from FY 2021. Local room occupancy tax collections totaled $330.5 million, a 31.4% increase over FY 2022 and a 203.8% increase over FY 2021.

State Room Occupancy Tax Collection, FY 2023-2020

Fiscal Year	State $ Millions	% Change	Local Option $ Millions	% Change
2023	388.0	31.9%	330.5	31.4%
2022	294.2	137%	251.5	131.2%
2021	124.2	-50.8%	108.8	-48.0%
2020	252.3	-11.1%	209.2	-8.6%

Source: MA DOR (state totals include convention center collections)

Room occupancy tax collections are driven by the overall performance of the lodging sector.

In FY 2023, Meet Boston, Cape Cod, and North of Boston were the top room occupancy tax-producing regions, accounting for 76% of local option room occupancy tax collections.

Local Option Room Occupancy Tax Collections by RTC, FY2023

RTC (Regional Tourist Council)	Collections ($)	Share (%)
Meet Boston	182,940,227	58%
Cape Cod Chamber/CVB	41,478,289	13%
North of Boston CVB	14,308,195	5%
Nantucket Chamber of Commerce	13,237,514	4%
Greater Merrimack Valley CVB	12,846,932	4%
Martha's Vineyard Chamber	8,898,393	3%
Metrowest Tourism & Visitor's Bureau	8,751,746	3%
1Berkshires	7,467,614	2%
See Plymouth	6,176,863	2%
Southeastern MA CVB	5,316,850	2%
Greater Springfield CVB	4,253,636	1%
Discover Central Massachusetts	2,691,310	1%
Visit North Central MA	2,660,624	1%
Hampshire County CVB	2,142,953	1%
Franklin County	378,682	>1%

Local option rooms tax collections data reflect rates imposed by municipalities only

Source: MA DOR

Spending by Industry Sector

In Calendar Year 2022, the largest share of visitors' direct domestic and international expenditures were for lodging, public transportation, and food services. The food services category generated the largest payroll of any category and the most jobs.

Expenditures, Payroll, & Employment by Industry Sector, CY 2022

Industry Sector	Expenditures ($ Millions)	% Total	Payroll ($ Millions)	% Total	Employment (Thousands)	% Total
Public Transportation	6,102.8	25.2%	1,112.5	18.64%	17.0	13.0%
Auto Transportation	3,226.5	13.3%	185.5	3.11%	4.4	3.4%
Lodging	7,063.4	29.2%	1,314.3	22.02%	30.6	23.3%
Food Services	5,064.8	20.9%	1,341.7	22.48%	43.8	33.4%
Entertainment/Recreation	1,056.5	4.4%	1,058.8	17.74%	20.6	15.7%
Retail Shopping	1,683.6	7.0%	247.3	4.14%	7.6	5.8%
Travel Planning	-	-	708.6	11.87%	7.2	5.5%
TOTAL	**24,197.60**	**100%**	**5,978.7**	**100%**	**131.2**	**100%**

Note: travel planning does not generate expenditure output

Source: USTA, Tien Tian LLC, Domestic plus International

PUBLIC TRANSPORTATION

Spending in CY 2022 for public transportation totaled $6.1 billion, a 68.1% increase from CY 2021.

Public transportation accounted for 25.22% of all expenditures, 18.64% of payroll, and 13.0% of employment.

The public transportation industry comprises air, inter-city bus, rail, boat and ship, and taxicab and limousine services.

Public Transportation Industry: Economic Impact, CY 2022-2019

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2022	6,102.8	1,112.5	17.0
2021	3,617.4	917.2	14.0
2020	1,955.8	876.5	13.2
2019	6,926.2	1,027.2	17.3

Source: USTA, Tien TIan LLC, Domestic plus International

Spending by Industry Sector

AUTO TRANSPORTATION

Spending in 2022 for auto transportation totaled $3.2 billion, an increase of 35% over 2021 and an increase of114.6% from 2020.

Auto transportation accounted for 13.33% of all expenditures, 3.11% of payroll, and 3.37% of employment.

Auto transportation comprises privately owned vehicles used for trips (i.e., automobiles, trucks, campers, and other recreational vehicles), gasoline service stations, and auto rentals.

Auto Transportation Industry: Economic Impact, CY 2022-2019

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2022	3,226.5	185.5	4.4
2021	2,388.0	170.8	4.2
2020	1,503.0	156.7	4.0
2019	2,719.3	182.3	5.0

Source: USTA, Tien Tian LLC, Domestic plus International

LODGING

Spending in 2022 for lodging totaled $7 billion, a 55% increase from 2021 and a 175.6% increase from 2020.

The lodging industry represented 29.19% of all expenditures, generated the second-largest share of payroll, 22.02%, and the second-largest share of employment, 23.31%.

The lodging industry comprises hotels and motels, inns, resorts, campgrounds, and ownership or rental of vacation and second homes.

Lodging Industry: Economic Impact, CY 2022-2019

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)
2022	7,063.4	1,314.3	30.6
2021	4,555.3	1,011.1	24.1
2020	2,562.5	965.4	23.6
2019	6,405.1	1,567.3	38.7

Source: USTA, Tien Tlan LLC, Domestic plus International

FOOD SERVICE

Spending in 2022 for food service totaled $5.1 billion, a 29.8% increase from 2021 and an increase of 96.2% from 2020.

Food service accounted for 20.93% of total expenditures. It generated the highest share of payroll, 22.48%, and the largest share of employment, 23.31%.

The labor-intensiveness of the food service sector and the large share of visitor expenditures spent on food results in this sector's major contribution to the travel industry's economic impact and to employment.

Food service comprises restaurants, other eating and drinking establishments, and grocery stores.

Food Service Industry: Economic Impact, CY 2022-201S

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2022	5,064.8	1,341.7	43.8
2021	3,933.7	1,076.3	38.4
2020	2,582.5	899.7	34.9
2019	5,054.0	1,418.1	57.1

Source: USTA, Tien Tian LLC, Domestic plus International

Spending by Industry Sector

ENTERTAINMENT & RECREATION

Spending in 2022 for entertainment & recreation totaled $1.06 billion an increase of 41.1% from 2021 and an increase of 111.8% from 2020.

Entertainment & recreation accounted for 4.37% of all expenditures, 17.74% of payroll, and 15.70% of employment.

Entertainment & recreation comprises user fees, sporting events, admissions at amusement parks, and attendance at movies and other cultural events.

Entertainment & Recreation Industry: Economic Impact, CY 2022-2019

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2022	1,056.5	1,058.8	20.6
2021	748.7	814.6	16.7
2020	498.8	686.7	14.6
2019	1,535.5	976.1	23.0

Source: USTA, Tien Tian LLC, Domestic plus International

RETAIL

Spending in 2022 for general retail totaled $1.7 billion, a increase of 36.8% from 2021 and an increase of 95.1% from 2020.

General retail accounted for 6.96% of all expenditures, 4.14% of payroll, and 5.80% of employment.

General retail comprises gifts, clothes, souvenirs, and other incidental retail purchases.

Retail Industry: Economic Impact, CY 2022-2019

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2022	1,683.6	247.3	7.6
2021	1,230.3	219.6	7.3
2020	862.6	196.4	6.5
2019	2,231.0	233.5	8.8

Source: USTA, Tien Tian LLC, Domestic plus International

TRAVEL PLANNING

In 2022, travel planning accounted for 11.87% of payroll and 5.47% of employment. This sector does not generate direct expenditures in Massachusetts because the expenditures take place in visitors' points of origin.

Travel planning comprises travel agents, tour operators, and others involved in planning trips.

Travel Planning Industry: Economic Impact, CY 2022-2019

Calendar Year	Payroll ($ Millions)	Employment
2022	708.6	7.2
2021	573.5	6.0
2020	511.7	5.4
2019	685.9	7.5

Source: USTA, Tien Tian LLC, Domestic plus International

Visitor Volume

Massachusetts hosted 19.5 million domestic person trips in CY 2022. See the chart of domestic visitor origins on p. 12.

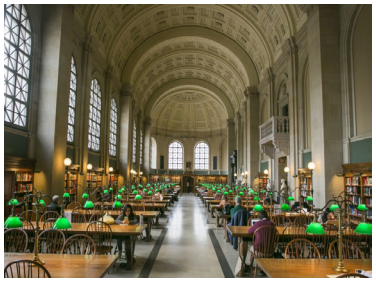
In CY 2022 Massachusetts welcomed 810,000 from Overseas countries. This includes 26,000 air-only travelers from Mexico and 19,000 air-only travelers from Canada.

For visitation numbers from top international markets, see p. 14.

Domestic Visitor Economic Impact by RTC

In CY 2022, domestic visitors spent $22 billion in direct expenditures, a 40.2% increase from 2021 and an increase of 5.1% over 2019.

Meet Boston, Cape Cod, and North of Boston generated 69.6% of all domestic travel expenditures, 61.9% of state tax receipts, and 65.6% of local tax receipts.



Economic Impact of Domestic Travel on Massachusetts RTCs, CY 2022

RTC	Expenditures ($ Millions)	Employment (Thousands)	Payroll ($ Millions)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
Meet Boston	12,667.20	58.1	3,025.10	506.4	298
Cape Cod (Barnstable County)	1,413.00	10.1	378	77.1	104
Greater Merrimack Valley	1,232.60	7.4	341.1	80.9	38.8
North of Boston (Essex County)	1,210.10	7.5	257.4	77.3	36.4
Metro West	1,086.00	8.2	363.5	66.3	30.1
See Plymouth	710.8	4.6	157.9	44.4	42.8
Greater Springfield	692.1	4	176.6	44.1	16.7
1Berkshires	640.8	4.4	148.5	36.4	22.1
Southeastern MA (Bristol County)	596.6	3.5	124	41	14.9
Nantucket Chamber	300.2	1.2	56	9.9	11.9
Martha's Vineyard (Duke's County)	239.5	1.8	61.4	10.8	17.3
Visit North Central MA	184.9	1	44.2	11.6	6.1
Hampshire County	159.1	0.9	34	10.5	5
Franklin County	85.7	0.6	18.7	5.5	3.4
Discover Central Massachusetts	732	4.7	184.3	43.9	20.1
Statewide Total 2022	**$21,951.2**	**118.0**	**$5,370.6**	**$1,066.1**	**$667.5**
Statewide Total 2021	**$15,653.7**	**102.2**	**$4,428.4**	**$782.6**	**$473.0**
Statewide Total 2020	**$9,308.7**	**93.6**	**$3,952.4**	**$531.3**	**$292.4**
Statewide Total 2019	**$20,887.1**	**130.5**	**$5,157.7**	**$866.2**	**$551.7**

Source: USTA, Tien Tian LLC, Domestic plus International

Domestic Visitor Origin

In CY2022, there were 19.5 million total domestic visitors to Massachusetts. Visitors from Massachusetts and neighboring states accounted for 61% of all domestic person trips to the state.

The largest state source of visitors was Massachusetts residents themselves, 6 million person trips, 31% of all domestic trips; followed by New York state with 2.6 million person trips, 14% of trips; and Connecticut, 1.8 million person trips, 9% of trips.

The definition of a visitor is one who travels 50 or more miles one way or who stays overnight in paid accomodations.

Domestic Visitor Origin: Top 10 States, CY 2022

State	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	6,041,000	31%
Connecticut	1,834,000	9%
New Hampshire	1,308,000	7%
Rhode Island	783,000	4%
Maine	492,000	3%
Vermont	331,000	2%
New York	2,640,000	14%
New Jersey	1,203,000	6%
Pennsylvania	563,000	3%
Florida	633,000	3%
Texas	490,000	3%
Other	785,000	4%

Source: Omnitrak

Domestic Visitor Behavior

DOMESTIC TRANSPORTATION MODE

The majority of visitors in Calendar Year 2022, 75%, drive to Massachusetts. Airplanes rank second at 16%.

Domestic Visitor Transportation Mode	
Own Auto/Truck/Motorcycle	75%
Shared Economy/Other	2%
Rental Car	4%
Train	4%
Bus	2%
Airplane	16%

Source: OmniTrak

DOMESTIC TRIP ACTIVITIES

Visiting relatives and friends combined is the most frequently reported trip activity by domestic visitors in CY 2022, 39%, followed by historic sites, 23% and fine dining 20%

Domestic Visitor Top Activities	
Visiting friends/relatives	39%
Historic sites	23%
Fine dining	20%
Shopping	20%
Beach	19%
Museums	14%
Urban sightseeing	12%
Unique local cuisine	9%
Rural sightseeing	9%
Local/folk arts/crafts	8%
State Parks & Monuments	8%
Hiking & Backpacking	6%
Wildlife Viewing	5%

Source: OmniTrak

DOMESTIC TRIP PURPOSE (PRIMARY)

Visiting friends or relatives is the dominant trip purpose and accounts for 49% of all domestic trips in CY 2022. Entertainment/sightseeing accounts for 15% of all trips. Pleasure/Personal travel accounts for 12% of all trips.

Domestic Visitor Primary Trip Purpose	
Visit Friends/Relatives	49%
Entertainment/Sightseeing	15%
Other, Pleasure/Personal	12%
Outdoor Recreation	8%
General Business	5%
Personal Business	5%
Conferences, Seminars, Conventions, and Trade Shows	3%
Other	2%

Source: OmniTrak

DOMESTIC LODGING

54% of overnight visitors stay in a hotel/motel/inn or B&B, 34% in a private home.

Overnight Domestic Visitor Lodging	
Hotel/Motel/Inn	54%
Private Home	34%
Rental Home/Condo/Shared Economy	**8%**
Personal Second Home/Condo or Time Share	5%
Other	5%

Source: OmniTrak

International Results Volume / Market Share

In CY 2022, Massachusetts welcomed 810,000 International visitors. Pre-pandemic, about one third of all international visitors to Massachusetts come from Canada, another third from Europe, and the rest from all other countries. Pre-pandemic, the Massachusetts market share of all overseas (not including Canada and Mexico) was around 4%. Listed below are data from origin countries where MOTT has representation and also countries that MOTT monitors closely.

Overseas, Mexican and Canadian Air Visitors to Massachusetts Volume Report CY 2022	
Origin Country	
All Overseas	810,000
United Kingdom	111,000
Germany	72,000
India	63,000
Brazil	55,000
France	49,000
People's Rep. of China	45,000
Dominican Republic	37,000
Italy	34,000
South Korea	28,000
Mexico (Air Only)	26,000
Ireland	24,000
Canada (Air Only)	19,000

Source: U.S. Department of Commerce

MOTT Grant Programs

REGIONAL TOURISM GRANT PROGRAM

Massachusetts' 16 Regional Tourism Councils (RTCs) are independent, membership-based, not-for-profit organizations that market their regions as travel destinations. Each RTC focuses on the travel market segments that generate the greatest economic return for its region: domestic visitors, international visitors, leisure visitors, group travel, meetings, conventions, and sports events. RTCs are funded by membership fees, other private-sector revenues sources, and funds from the Regional Grant Program.

The Regional Grant Program was established by statute (Chapter 23A, Section 14) and is managed by MOTT. It provides state funds to each RTC to support its destination marketing programs. The grant program requires that RTCs match their grants with a minimum one-to-one match of nongovernmental funds. Grants are awarded based on a performance-based formula which evaluates the economic impact of RTCs' efforts (20%), their marketing plans (40%), room occupancy tax collected (20%), and their abilities to raise matching funds (20%).

RTC FY 2024 Summary	
Regional Tourist Council	Allocation
1Berkshire	$517,136.55
Cape Cod Chamber of Commerce/CVB	$812,934.60
Discover Central Mass CVB	$420,619.22
Franklin County Chamber of Commerce	$258,856.99
Meet Boston	$2,046,991.19
Greater Merrimack Valley CVB	$423,621.92
Greater Springfield CVB	$411,251.52
Martha's Vineyard Chamber of Commerce	$392,252.82
Mohawk Trail Association	$175,869.59
Nantucket Island Chamber of Commerce	$425,697.85
North of Boston CVB	$584,003.72
See Plymouth	$434,946.43
Southeastern MA CVB	$262,249.40
Visit North Central MA	$328,473.23
Hampshire County Tourism & Visitors Bureau	$316,610.13
MetroWest Tourism & Visitor Bureau	$338,141.53
TOTAL	$8,149,656.69

Note: Award is Formula Allocation less Research Allocation