OFFICE OF PERFORMANCE MANAGEMENT & OVERSIGHT
FISCAL 2013 ANNUAL REPORT GUIDANCE

The Office of Performance Management & Oversight (OPMO) measures the performance of all public and quasi-public entities engaged in economic development. All agencies are required to submit an Annual Report, which includes all of the following information and demonstrates progress made against the Annual Plan submitted for the same year.

Based on review of Performance to Plan, the Office of Performance Management and Oversight will annually re-evaluate the goals and measures established by the agencies. The Office will recommend changes to goals and measures as appropriate to align with the statewide economic development policy and plan.

The annual reports of each agency will be published on the official website of the Commonwealth, and be electronically submitted to the clerks of the Senate and House of Representatives, the Chairs of the House and Senate Committees on Ways and Means and the House and Senate Chairs of the Joint Committee on Economic Development and Emerging Technologies.

Filing Instructions:

The Fiscal Year 2013 report is due no later than **Friday, November 1, 2013**. An electronic copy of the report and attachments A & B should be e-mailed to Anne.Struthers@state.ma.us.

1) AGENCY INFORMATION	
Agency Name	Massachusetts Office of Travel & Tourism
Agency Head	**Betsy Wall**
Title	**Executive Director**
Website	**massvacation.com**
Address	**10 Park Plaza (suite 4510), Boston MA 02116**

2) MISSION STATEMENT
Please include the Mission Statement for your organization below.
To market Massachusetts as a leisure travel destination in order to generate state and local tax

revenues, create jobs, and support travel-related businesses.

3) Performance on Goals and Objectives

Please provide details on the agency's progress and accomplishments for Fiscal Year 2013 as it relates to the Fiscal Year 2013 Plan submitted by your agency. This information should be included as **Attachment A and should include prior year perspective.** In addition to your Performance to Plan Report, Questions 5 through 10 provides guidance on the specific information required under Chapter 240 of the Acts of 2010.

4) Accounting

Please provide financial information for your agency. Below please give a summary of *Receipts and Expenditures* during the fiscal year, and include the *Assets and Liabilities* at the end of the fiscal year. Please include the most recent audited financial report for the agency as **Attachment B**.

	Amount
Receipts	**$12,130,007**
Expenditures	**$12,054,487**
Assets	**$0**
Liabilities	**$0**

5) Investments or Grants to Businesses or Individuals

Does your agency make **investments** and/or provide **grants** to businesses or individuals? **Yes x** ☐
No ☐

If **Yes**, please provide detailed information on investments and/or grants made during FY13 in the **Performance on Goals and Objectives** section of this report. Information should include the number, nature and amounts of investments made and grants awarded by your agency along with job, investment and/or other economic development impact. Please list the name(s) of the investment and/or grant programs offered by your agency in the space provided below:

Provide grants to businesses or individuals: Yes

Grant details:

I. Grants provided, per MGL Chapter 23A, Sec. 14

The office of travel and tourism is hereby directed, subject to appropriation, to establish a program for financial assistance to those public or nonprofit agencies which promote or provide services for

tourism, convention, travel and recreation in the commonwealth.

RTC – TOTAL GRANT: $6.0M FY13 Formula Allocation

Berkshire CVB $ 316,055.36

Southeastern Mass CVB $ 71,202.93

Cape Cod Chamber of Commerce $ 503,890.01

Franklin County Chamber $ 234,402.22

Greater Boston CVB $2,066,261.67

Greater Merrimack Valley CVB $ 321,568,15

Greater Springfield CVB$ 250,147.90

Martha's Vineyard Chamber $ 282,614.65

Nantucket Chamber of Commerce $ 237,710.83

North of Boston CVB $ 252,449.00

Plymouth County CVB $ 240,434.71

Central Mass CVB $ 278,895.60

Mohawk Trail Association $ 129,480.00

MetroWest Visitors Bureau $ 205,815.93

Johnny Appleseed Trail Association $ 135,004.83

Hampshire County CVB $ 180,540.21

Chart 1 $5,576,994.00

II. Grants provided to individual organizations via the Regional Tourism Council: (this funding came from our stability funds)

ORGANIZATION $ AMOUNT PURPOSE REGIONAL TOURISM COUNCIL

Massachusetts Association of Campground Owners $10,000 For production of their FY13 campground directory Martha's Vineyard

The Freedom Trail Foundation $50,000 To support their FY13 advertising and printing efforts Greater Boston CVB

Amesbury Fireball Run $10,000 To aid in the promotion of this national fundraiser North of Boston CVB

Old Colonial Historical Society, Taunton $500 For production of an updated brochure Plymouth County CVB

CapeFlyer Train $3,800 Towards production of their new websiet Cape Cod Chamber of Commerce

Cape Cod Chamber of Commerce $25,000 To assist with FY13 advertising and marketing efforts Cape Cod Chamber of Commerce

Greater Boston CVB $90,000 To assist with FY13 advertising and marketing efforts Greater Boston CVB

Greater Springfield CVB $50,000 To establish a Western MA Sports Commission Greater Springfield CVB

Central Massachusetts CVB $10,000 To promote the Civil War Event Central MA

CVB

Greater Springfield CVB$43,000 For production of YouTube video and branding campaign efforts Greater Springfield CVB

Cape Cod Chamber of Commerce $5,000 To host the Pennsylvania Bus Association Meeting Cape Cod Chamber of Commerce

Plymouth County CVB $3,000 To support advertising for 20 attractions in Southeastern Mass Plymouth County CVB

Plymouth County CVB $2,335.75 Advertising support for the new minor league baseball team, Plymouth Pilgrims Plymouth County CVB

-end-

6) Debt or Equity Investment Details

Is your agency involved in **debt** or **equity investments** for businesses? **Yes** ☐ **No x**☐
If **Yes**, please provide detailed information on debt and/or equity investments made during FY13 in the **Performance on Goals and Objectives** section of this report along with job, investment and/or other economic development impact. Please list the name(s) of the debit and/or equity investments programs offered by your agency in the space provided below:

[Please enter the debt or equity investment details here.]

7) Loan Details

Is your agency involved in **real estate loans**, **working capital loans**, or any **other type of loan** or **guarantee**? **Yes** ☐ **No x**☐
If **Yes**, please provide detailed information on loan(s) and/or guarantee(s) made during FY13 in the **Performance on Goals and Objectives** section of this report along with job, investment and/or other economic development impact. Please list the types of loan(s) and/or guarantee(s) offered by your agency in the space provided below:

[Please enter the loan details here.]

8) Other forms of Financing or Financial Assistance?

If your agency provides any other form of financing or financial assistance, please include FY13 details in the **Performance on Goals and Objectives** section of this report along with job, investment and/or other economic development impact. Please list the types of other forms of financing offered by your agency in the space provided below:

[Please enter the details on financing or financial assistance here]

9) Patents or Products

Does your agency track **patents** or **products** resulting from agency-funded activities? **Yes** ☐ **No x**☐
If **Yes**, please include details in the **Performance on Goals and Objectives** section of this report along with job, investment and/or other economic development impact. Please list the agency-funded activities of your agency that promote patent and product advancement in the space provided below:

[Please enter the details on patents or products here.]

10) Technical Assistance

If your agency provides technical assistance, please provide detailed information on technical assistance provided during FY13 in **the Performance on Goals and Objectives** section of this report along with job, investment, and/or other economic development impact. Please list the name(s) of the technical assistance programs offered by your agency in the space provided below:

[Please enter the details on technical assistances here.]

MASSACHUSETTS OFFICE OF TRAVEL & TOURISM

STRATEGIC PLAN FY2014

Report against plan noted in red (November, 2013)

MISSION: To market Massachusetts as a leisure travel destination in order to generate state and local tax revenues, create jobs, and support travel-related businesses.

SNAPSHOT OF MASSACHUSETTS TOURISM:

Top 5 Origin Markets
(Ranked by estimated Visitor Spending)

DOMESTIC	INTERNATIONAL
1. Boston	**1.** Canada
2. New York	**2.** UK
3. Hartford/New Haven	**3.** China
4. Prov./New Bedford	**4.** Germany
5. NH, VT, ME (Beyond DMAs)	**5.** France

Massachusetts Tourism Economic Impact

CY 2012 Revenue:
$17.7 Billion

Total Number of Visitors CY2012:
22.8 Million

Tax Revenue CY2012:
$1.1 Billion

Number of Jobs Supported:
126,500

Strategic Goal 1:

To maximize tourism revenues by focusing marketing efforts on domestic and international markets, generating maximum return on investment. MOTT made a strategic decision to reorient marketing through digital platforms in order to ensure agility and measurability.

- Focus domestic marketing efforts on DMAs that generate the highest volume of overnight leisure trips: in state, New York, and New England.
- Increase and allocate international marketing resources based on visitation patterns and economic outlooks: expand Canadian program; continue programs in European Markets.
- Collaborate with other New England states on marketing/PR in European markets through *Discover New England* (DNE).
- Achieve cost efficiencies in media production by leveraging purchasing power and negotiate added value in digital, print, radio, and TV.

Strategic Goal 2:

Develop niche markets that have potential to generate significant revenues and are important sources of revenue for specific regions and businesses. Enhance Massachusetts brand.

Enter emerging markets: Asia, India, Brazil; Align international efforts with Brand USA to qualify for 30% added value.

Niche/Special Interest Markets:	
LGBT	Multicultural
Historic Ports (cruise)	Sports Enthusiasts
Accessibility	Film Buffs
Group Tour	Weddings
MassJazz	Culinary
Native MA	

Strategic Goal 3:

Increase earned-media-value utilizing a strong PR program:

- Increase the effectiveness of marketing programs and the frequency of marketing messages through robust, innovative social media program and search functions.
- Use 3rd party sources – TV shows, magazines, online bloggers – to increase the credibility of MOTT's marketing messages.
- Convey and provide vivid imagery of Massachusetts' destinations, attractions, and activities.

Strategic Goal 4:

Monitor consumers' changing media habits and shift marketing vehicles appropriately; leverage social media. As stated above (see goal #1), this is the underlying principle of all our programs. The data derived from these programs is extremely instructive and allows for smarter, real-time initiatives.

- Expand online marketing programs.
- Launch mobile applications.
- Maintain blogs.
- Produce and viral-market video for targeted audiences.

Strategic Goal 5:

Use MOTT's leadership to increase the effectiveness of regional tourism councils, other DMOs, and travel businesses. With our ad agency, we are now preparing a digital audit of each RTC which will allow them/us to align metrics and strategies.

- Develop a common research platform so RTCs can better target their marketing program to best traveler prospects.
- Assess annual Governor's Conference on Travel & Tourism programming to increase attendees' knowledge and practical skills.
- Encourage RTCs to develop multi-region marketing programs.
- Tourism U: offers free skill-based workshops throughout the state.
- Industry Newsletters: keep trade aware of MOTT program and marketing opportunities.
- Make industry aware that MOTT provides marketing assistance to municipalities.

Strategic Goal 6:

Employ primary and secondary research to target marketing programs and evaluate results. Our Canada TV program was measured through standard brand survey techniques.

- Track web use: volume and visitor origins.
- Develop visitor profiles; Survey visitors, re: preferences.
- Track revenue stats by region.
- Share all research with travel industry to help focus marketing programs.

Strategic Goal 7:

Maximize effectiveness of new universal database. New website has been rolled out this year, and we are working with the industry to enhance their listings for maximum impact.

- Increase travel industry's ability to post information on massvacation.com and get exposure to potential customers.
- Increase MOTT's ability to target industry communications.

Strategic Goal 8

70 Massachusetts communities have hosted 16 major productions, creating 72,461 "worker days" and 55 new instate film related businesses. The Sports office submitted a statewide bid to NCAA and has made the "finals"; selections to be announced in December.

- Continue to align sports marketing into MOTT; including competitive bidding efforts, refined branding of Massachusetts as sports destination.
- Maintain Massachusetts film office at MOTT: marketing Massachusetts as desirable location for big Budget Hollywood movies, small independents, and commercials. Also, branding as a film buffs destination.

Betsy Wall
Executive Director
betsy.wall@state.ma.us

MASSACHUSETTS
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Massachusetts

OFFICE OF TRAVEL & TOURISM

2012 ANNUAL REPORT

Commonwealth of Massachusetts

GOVERNOR
Deval L. Patrick

LIEUTENANT GOVERNOR
Timothy P. Murray

SECRETARY OF HOUSING AND ECONOMIC DEVELOPMENT
Gregory Bialecki

Massachusetts Office of Travel & Tourism

EXECUTIVE DIRECTOR
Betsy Wall

REPORT DATA

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

TRAVELSTATS

The Massachusetts Office of Travel & Tourism (MOTT) publishes a free monthly research e-newsletter, *TravelStats,* which comprises lodging, attractions, and airport data; lodging tax collections; Massachusetts Tourism Fund receipts; and site and circulation data for massvacation.com. To subscribe, contact tony.dagostino@state.ma.us. Current and past issues are posted at www.massvacation.com/research.

TOP NUMBERS

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

ECONOMIC IMPACT

- Direct spending by domestic and international visitors totaled $16.9 billion in 2011(p. 4).
- Visitor expenditures supported 124,700 jobs in 2011 and $3.6 billion in wages and salaries (p. 4).
- Visitor expenditures generated $1.1 Billion in Massachusetts state and local tax revenue in 2011 (p. 4).
- Each dollar spent by a visitor in 2011 generated 3.9 cents in state tax receipts and 2.4 cents in local taxes (p. 4).
- State hotel room occupancy tax collections totaled $183.7 million and local option room occupancy tax collections totaled $146.1 million in FY2012 (p. 6).

VISITOR ORIGIN

- In FY2012, Massachusetts hosted 20 million domestic visitors. In CY2011, there were 2.1 million international visitors; 1.3 million came from overseas and 678,000 from Canada (p. 10).
- Domestic visitors accounted for approximately 90% of all visitors; international visitors, 10% (p. 10).

DOMESTIC & INTERNATIONAL VISITORS

- In FY2012, 59.2% percent of all person trips originated in New England and 15.3% from the mid-Atlantic states (NY, NJ, and PA) (p. 12).
- Visiting friends and relatives is the most frequently reported primary trip purpose (46.9%) (p. 13).
- Travel by personal car is the dominant mode of transportation (69.6%) (p. 13).
- 69.9% of the domestic visitors who spent at least one night in Massachusetts reported staying in a hotel, motel, or bed and breakfast (p. 13).
- Seasonality of domestic visitors...16% of domestic visitors come in the first quarter of the calendar year (Q1), 25% during (Q2), 37% during (Q3) and 22% during (Q4).
- Canada, the United Kingdom, and China are the top three countries of origin and accounted for 50% of all international visitors to MA in 2011 (p. 26).

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ECONOMIC IMPACT

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

Direct Economic Impact of Travel on Massachusetts, 2007 – 2011					
Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
2011	16,913.8	3,629.0	124,700	652.2	406.1
2010	15,529.9	3,475.7	121,700	622.7	383.6
2009	14,352.6	3,407.5	121,500	573.8	341.5
2008	15,576.8	3,650.1	128,800	598.1	364.6
2007	15,144.6	3,582.8	127,800	588.0	355.4

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

Direct expenditures by domestic and international visitors to Massachusetts totaled $16.9 billion in 2011, an 8.9% increase from 2010 and a 11.7% increase over 2007.

Massachusetts' 2011 direct expenditures represented a 2.0% share of all 2011 U.S. direct expenditures ($812.9 billion).

Domestic visitors spent $14.6 billion in 2011, 86.4% of all spending; international visitors, $2.3 billion, 13.6%. An analysis of spending by industry sectors shows major differences between domestic and international visitors' spending behavior.

In 2011, domestic spending increased 8.5%; international increased 11.6%.

Visitor spending supported 124,700 full-time, part-time, and seasonal jobs, an increase of 2.4% from 2010, and payroll of $3.6 billion, a 4.4% increase.

The state received $652.2 million in revenues through the state sales tax, excise taxes, and taxes on travel-related personal and corporate income, a 4.7% increase from 2010. Local community revenue totaled $406.1 million in sales and property tax revenue, a 5.9% increase.

Domestic and International Direct Expenditures by Industry Sector, 2011				
2011 Expenditures	Domestic ($ Millions)	International ($ Millions)	Total ($ Millions)	% of Total
Public Transportation	4,744.7	287.7	5,032.4	29.8%
Auto Transportation	2,240.7	34.6	2,275.3	13.5%
Lodging	2,920.0	775.7	3,695.6	21.8%
Foodservice	2,906.1	439.0	3,345.0	19.8%
Entertainment & Recreation	869.2	185.4	1,054.7	6.2%
General Retail Trade	939.1	571.7	1,510.8	8.9%
2011 Totals	$14,619.8	$2,294.0	$16,913.8	100.0%
Percentages	86.4%	13.6%	100.0%	
2010 Totals	$13,475.0	$2,054.9	$15,529.9	
Percentages	86.8%	13.2%	100.0%	

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

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 2011, the total impact of all travel spending was $26.9 billion, an 8.9% increase from 2010.

Multiplier Impact of Direct Spending, 2011

Impact Measure	Direct Impact	Indirect & Induced Impact	Total Impact	% change over 2010
Economic Impact (millions)	$16,913.8	$10,022.3	$26,936.2	8.9%
Earnings (millions)	$3,629.0	$3,334.4	$6,963.4	5.0%
Employment (thousands)	124.7	77.3	202.0	2.2%
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: TIA, The Economic Impact of Travel on MA Counties, 2011

ROOM OCCUPANCY TAXES

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

In FY2012, state room occupancy tax collections (including convention centers) totaled $183.7 million, a 9.8% increase from FY2011 and a 5.5% increase over FY2008. Local room occupancy tax collections totaled $146.1 million, an 11.3% increase over FY2011 and a 50.8% increase over FY2008.

In FY2011, Suffolk, Middlesex, and Barnstable counties were the top three room occupancy tax-producing counties, accounting for 67.4% of state and 74.6% of local option room occupancy tax collections. On 10/1/2009 the local option rooms tax rate was increased from a maximum of 4% to 6%.

Room occupancy tax collections are driven by the overall performance of the lodging sector. In CY2012 Massachusetts' room revenue was up 8.3% compared to the national rate which increased 7.3%.

Room Occupancy Tax Collections, FY2008 – 2012

Fiscal Year	State $ Millions	% Change	Local Option $ Millions	% Change
2012	183.7	9.8%	146.1	11.3%
2011	167.3	9.9%	131.3	28.2%
2010	152.2	-5.4%	102.4	14.0%
2009	160.9	-7.6%	89.8	-7.3%
2008	174.2	10.6%	96.9	9.6%

Source MA DOR (state totals include convention center collections)

MA Lodging Results CY2012 vs. CY2011 % Change

	Supply	Occupancy	Room Rate	Revenue
U.S.	0.5	2.5	4.2	7.3
MA	0.5	1.0	6.7	8.3
NJ	1.8	3.9	3.2	9.2
NY	1.8	2.1	3.8	7.9
PA	1.5	-0.4	3.6	4.7

Source Smith Travel Research

Room Occupancy Tax Collections by County, FY2012

County	State Collections ($000)	Share %	Local Option Collections ($000)	Share %
Barnstable	12,408	11.2%	10,348	7.9%
Berkshire	3,915	3.5%	3,636	2.8%
Bristol	2,489	2.3%	2,172	1.7%
Dukes	1,733	1.6%	1,171	0.9%
Essex	6,216	5.6%	5,887	4.5%
Franklin	441	0.4%	377	0.3%
Hampden	3,316	3.0%	2,197	1.7%
Hampshire	1,372	1.2%	1,375	1.0%
Middlesex	20,931	19.0%	27,504	21.0%
Nantucket	1,807	1.6%	1,860	1.4%
Norfolk	7,406	6.7%	7,512	5.7%
Plymouth	2,462	2.2%	2,283	1.7%
Suffolk	41,067	37.2%	60,132	45.8%
Worcester	4,838	4.4%	4,827	3.7%
Total FY2011	110,401	100.0%	131,281	100.0%
Total FY2010	101,569		102,406	

Source MA DOR

SPENDING BY INDUSTRY SECTOR

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

In 2011, the largest share of visitors' direct expenditures was for public transportation, followed by lodging and food service. The lodging sector generated the largest payroll of any category; food service generated the most jobs.

Expenditures, Payroll, & Employment by Industry Sector, 2011

Industry Sector	Expenditures ($ Millions)	% Share	Payroll ($ Millions)	% Share	Employment	% Share
Public Transportation	5,032.4	29.8%	621.4	17.1%	14,500	11.6%
Auto Transportation	2,275.3	13.5%	129.1	3.6%	3,900	3.1%
Lodging	3,695.6	21.8%	912.0	25.1%	28,700	23.0%
Foodservice	3,345.0	19.8%	876.2	24.1%	47,400	38.0%
Entertainment & Rec	1,054.7	6.2%	503.0	13.9%	17,100	13.7%
Retail	1,510.8	8.9%	202.8	5.6%	7,600	6.1%
Travel Planning	n/a	n/a	384.5	10.6%	5,500	4.4%
	16,913.8	100.0%	3,629.0	100.0%	124,700	100.0%

Note: Travel Planning does not generate expenditure data

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

PUBLIC TRANSPORTATION

Spending in 2011 for public transportation totaled $5.0 billion, an 10.0% increase from 2010 and a 8.8% increase over 2007.

Public transportation accounted for 29.8% of all expenditures, 17.1% of payroll, and 11.6% of employment.

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

Public Transportation Industry: Economic Impact, 2007 – 2011

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2011	5,032.4	621.4	14,500
2010	4,575.7	585.0	14,000
2009	4,131.1	575.0	13,800
2008	4,684.3	598.5	14,800
2007	4,624.8	621.6	14,900

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

LODGING

Spending in 2011 for lodging totaled $3.7 billion, an 8.2% increase from 2010 and a 5.6% increase over 2007.

The lodging industry represented 21.8% of all expenditures. It generated the largest share of payroll, 25.1%, and the second largest share of employment, 23.0%.

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

Lodging Industry: Economic Impact, 2007 – 2011

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2011	3,695.6	912.0	28,700
2010	3,415.8	870.9	28,200
2009	3,095.5	848.3	28,400
2008	3,564.0	938.3	30,900
2007	3,498.5	910.7	30,300

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

FOOD SERVICE

Spending in 2011 for food service totaled $3.3 billion, a 6.4% increase over 2010 and an increase of 16.3% over 2007.

Food service accounted for 19.8% of total expenditures. It generated the second-highest share of payroll, 24.5%, and the largest share of employment, 37.8%.

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, 2007 – 2011

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2011	3,345.0	876.2	47,400
2010	3,143.8	842.6	46,300
2009	2,980.9	833.9	46,000
2008	2,981.3	856.3	47,300
2007	2,876.0	832.7	47,100

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

AUTO TRANSPORTATION

Spending in 2011 for auto transportation totaled $2.3 billion, an increase of 15% over 2010 and an increase of 18% over 2007.

Auto transportation accounted for 12.8% of all expenditures, 3.5% of payroll, and 3.1% 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, 2007 – 2011

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2011	2,275.3	129.1	3,900
2010	1,982.0	124.7	3,800
2009	1,838.4	126.3	3,900
2008	2,045.8	128.0	4,000
2007	1,933.3	129.6	4,100

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

SPENDING BY INDUSTRY SECTOR

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

ENTERTAINMENT & RECREATION

Spending in 2011 for entertainment & recreation totaled $1.1 billion and increase of 5.8% over 2010 and an increase of 14.9% over 2007.

Entertainment & recreation accounted for 6.2% of all expenditures, 13.9% of payroll, and 13.7% of employment.

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

Entertainment & Recreation Industry: Economic Impact, 2007 – 2011

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2011	1,054.7	503.0	17,100
2010	997.0	491.2	16,900
2009	955.2	473.4	16,600
2008	955.9	496.3	17,300
2007	918.0	478.2	17,000

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

RETAIL

Spending in 2011 for general retail totaled $1.5 billion, an increase of 6.7% over 2010 and an increase of 16.8% over 2007.

General retail accounted for 8.9% of all expenditures, 5.6% of payroll, and 6.1% of employment.

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

Retail Industry: Economic Impact, 2007 – 2011

Calendar Year	Expenditures ($ Millions)	Payroll ($ Millions)	Employment
2011	1,510.8	202.8	7,600
2010	1,415.4	195.0	7,400
2009	1,351.5	194.8	7,500
2008	1,345.5	193.6	7,700
2007	1,293.9	191.2	7,700

Source: TIA, The Economic Impact of Travel on MA Counties, 2009

TRAVEL PLANNING

In 2011, travel planning accounted for 10.6% of payroll and 4.4% 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, 2007 – 2011

Calendar Year	Payroll ($ Millions)	Employment
2011	384.5	5,500
2010	366.3	5,300
2009	355.9	5,300
2008	439.1	6,800
2007	418.7	6,600

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

VISITOR VOLUME

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

Massachusetts hosted 20.0 million domestic person trips in FY2012. See the chart of domestic visitor origins for FY2012 on p. 12.

In CY2011, Massachusetts hosted 2.1 million international person trips. 66% of the person trips were from overseas, 34% from Canada.

Massachusetts' share of all Canadian travel to the U.S. in 2011 was 3.2%, down from 3.4% in 2010. Massachusetts' share of overseas travel to the U.S. increased from 5.0% to 5.3% in 2011.

For visitation numbers from top international markets, see p. 25.

DOMESTIC VISITOR ECONOMIC IMPACT BY COUNTY

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

In 2011, domestic visitors spent $14.6 billion in direct expenditures, an 8.5% increase from 2010 and an increase of 9.5% over 2007.

Greater Boston - Suffolk, Middlesex, and Norfolk counties - generated 68.8% of all travel expenditures, 60.8% of state tax receipts, and 56.9% of local tax receipts.

Domestic Economic Impact on Massachusetts Counties, 2007-2011

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
Barnstable	$851.80	$217.60	8.43	$35.93	$51.48
Berkshire	345.80	86.53	3.46	17.13	9.76
Bristol	421.19	83.71	2.95	21.61	8.07
Dukes	122.31	29.82	1.18	4.59	6.97
Essex	752.67	168.05	6.21	38.76	19.30
Franklin	55.99	9.77	0.36	2.98	1.76
Hampden	483.04	101.64	3.21	25.95	9.49
Hampshire	111.06	23.31	0.83	5.82	3.00
Middlesex	2,161.21	551.98	19.48	115.71	57.07
Nantucket	147.73	30.31	0.99	4.29	5.21
Norfolk	922.45	268.31	9.31	47.63	19.83
Plymouth	514.19	97.83	3.59	24.36	23.19
Suffolk	6,979.10	1,300.86	41.48	178.70	127.04
Worcester	751.26	143.98	5.33	38.75	16.45
Statewide 2011	14,619.81	3,113.70	106.81	562.21	358.63
Statewide 2010	13,474.99	2,992.62	104.73	538.88	339.88
Statewide 2009	12,419.6	2,929.5	104.4	495.2	301.8
Statewide 2008	13,539.5	3,150.6	110.9	518.5	323.5
Statewide 2007	13,346.5	3,137.0	111.7	516.9	319.1

Source: TIA, The Economic Impact of Travel on MA Counties, 2011

DOMESTIC VISITOR ORIGIN

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

In FY2012, visitors from New England and the mid-Atlantic states (NY, NJ, and PA) accounted for 74.5% of all domestic person trips to the state.

The largest source of visitors was Massachusetts residents themselves, 6.7 million person trips, 32.6% of all domestic trips; followed by New York state with 1.9 million person trips, 9.2% of trips; and Connecticut, 1.6 million person trips, 9.0% of trips.

Again, the definition of a visitor is one who travels 50 or more miles one way or who stays overnight.

Domestic Visitor Origin: Top 10 States, FY2012

State	Person Trips to Massachusetts	Share of all Person Trips
Massachusetts	6,745,000	32.6%
New York	1,908,000	9.2%
Connecticut	1,852,000	9.0%
New Hampshire	1,708,000	8.3%
Rhode Island	635,000	3.1%
California	957,000	4.6%
Florida	654,000	3.2%
New Jersey	843,000	4.1%
Maine	842,000	4.1%
Vermont	454,000	2.2%
All Other States	3,397,000	16.4%
All New England States	12,236,000	59.2%
All Mid Atlantic States	3,157,000	15.3%

Source: TNS, Travels America, FY2012

DOMESTIC VISITOR BEHAVIOR, FY2012

MASSACHUSETTS TRAVEL INDUSTRY BY THE NUMBERS

DOMESTIC TRIP DURATION & COMPOSITION

Just under 2/3 of all person trips in FY2012 included an overnight stay. Overnight visitors averaged 3.3 nights in Massachusetts. All visitors — overnights and those on day trips — averaged 2.1 nights. 20.0% of all travel parties included one or more children less than 18 years of age. 39% included only one adult, 50% had two adults and 11% had three or more adults.

DOMESTIC TRANSPORTATION MODE

The majority of visitors, 69.9%, drive their own vehicle to Massachusetts. Air travel ranks second at 18.3%.

Domestic Visitor Transportation Mode, FY2012	
Own Auto/Truck/Motorcycle	69.9%
Airplane	18.3%
Rental Car	3.1%
Bus	3.2%
Train	1.8%
Ship/Boat	1.1%
Motorcoach	0.3%
Camper/RV	0.2%

Source: TNS, Travels America, FY2012

DOMESTIC LODGING

43.5% of overnight visitors stay in a hotel/motel/inn or B&B, 46.4% in a private home.

Overnight Domestic Visitor Lodging, FY2012	
Hotel/Motel/Inn	42.0%
Private Home	46.4%
Condo/Timeshare	4.1%
RV/Tent	1.6%
Bed & Breakfast	1.5%
Other	4.5%

Source: TNS, Travels America, FY2012

DOMESTIC TRIP PURPOSE (PRIMARY)

Visiting friends or relatives is the dominant trip purpose and accounts for 46.9% of all domestic trips. Business and convention/seminar travel accounts for 10.1% of all trips.

Domestic Visitor Primary Trip Purpose, FY2012	
Visit Friends/Relatives	46.9%
Personal	19.2%
Entertainment/Sightseeing	12.5%
Business	7.7%
Outdoor Business/Leisure	6.1%
Outdoor Recreation	5.2%
Other	2.4%

Source: TNS, Travels America, FY2012

DOMESTIC TRIP ACTIVITIES

Attendance at family events is the most frequently reported trip activity by domestic visitors, 29.3%, followed by shopping, 17.3%. Fine dining, beaches, rural sightseeing, historical places/museums, and urban sightseeing follow in rank order.

Domestic Visitor Top 10 Activities: FY2012	
Visiting Relatives	29.3%
Visiting Friends	19.2%
Shopping	17.3%
Fine Dining	14.8%
Beaches	16.1%
Rural Sightseeing	13.0%
Urban Sightseeing	12.7%
Historical Places/Churches	11.7%
Museums	7.3%
State/National Parks	7.5%

Source: TNS, Travels America, FY2012

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

MOTT MISSION

MOTT is the state agency dedicated to promoting Massachusetts as a leisure travel destination in order to stimulate theMassachusetts economy by generating state and local taxrevenues, creating jobs, and supporting the growth of travel-related businesses.

DOMESTIC MARKETING OVERVIEW

MOTT's domestic marketing programs focus on generating overnight leisure travel by consumers in selected media markets within Boston, New England and New York. Research is used extensively to determine best customer prospects, markets, campaign timing, messages and collateral materials. It's also used to evaluate results. Advertising spending is focused on the summer, fall & winter seasons. Public relations is used year-round to help keep MOTT's messaging in the marketplace. MOTT's marketing programs are fully integrated with a mix of broad-based traditonal and social media

Massachusetts Market Share From Target DMAs

DMA	Total Visitors from DMA (000)	Visitors from DMA to MA (000)	MA Market Share
New York City DMA	64,875	2,564	4.0%
Hartford/New Haven DMA	5,215	1,453	27.9%
Albany/Troy DMA	5,363	677	12.6%
Providence/New Bedfrd DMA	5,939	1,359	22.9%
Boston DMA	26,701	5,262	19.7%
Sprgfld/Hlyke DMA	3,158	809	25.6%

Source: TNS CY2011

FY2012 DOMESTIC MARKETING PROGRAMS

MOTT's programs are research driven and targeted at best customer prospects and are rigorously evaluated both during and post program. All marketing programs target Massachusetts' best customer prospects: 35-64 years old with a household income of $75,000+. Media is skewed toward women, who have a greater propensity to plan and make travel decisions. In FY10, we allocated 70% of media budget to TV (broadcast and cable) and reduced print expenditures which were reallocated to online/search. (see media table on page 15)

- Radio
- Online Advertising Campaign
- www.massvacation.com
- Public Relations
- Targeted Consumer Outreach
- Social Media: Facebook, Twitter, Pinterest, Instagram, Google+, YouTube
- Niche Programming:

MA Green

LGBT

Small Meetings

Multicultural

Weddings

Disability

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

Domestic Marketing Budget		
Marketing, collateral, and research	FY12: $3.63m	FY11: $5.1m
Public relations	FY12: $200,000	FY11: $0.21m
Total	FY12: $3.65m	FY11: $5.31m

Media		
	FY12	FY11
Net media	$ 2.076m	$ 3.4m
Allocation by market		
New York DMA	27.51%	52%
Massachusetts	44.74%	2%
Connecticut	1.69%	15%
MA & NY DMA	4.82%	4%
All Markets/National	21.25%	27%
Allocation by media		
TV	n/a%	70%
Radio	13.22%	1%
Print	4.97%	15%
Digital	81.81%	14%

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

FY12 AT A GLANCE

FY12 DOMESTIC MARKETING CAMPAIGN

Tagline: It's All Here
Primary Markets: Massachusetts, New York DMA
Domestic Marketing Total Budget - $3,626,000

RADIO ADVERTISING

Fall Foliage Opportunistic Radio - Live Reads
:10 & :15 copy read live by stations
Air Dates: 9/26/11 - 10/9/11
Focused on the foliage season peaking later in MA and that you don't have to go far to see beautiful foliage. These spots encouraged listeners to visit the fall foliage microsite for fall events and fall foliage driving routes around Massachusetts.

Holiday Break Opportunistic Radio - Live Reads & Endorsements
:10 & :15 copy read live by stations, as well as :30 & :60 copy used in hand-picked DJ endorsements (for example: Lisa Donovan from Kiss 108 on Matt in the Morning)
Air Dates: 12/19/11 - 1/1/12
Focused on "it's all here" this winter vacation in Massachusetts, encouraging listeners to visit Massvacation.com to find various indoor and outdoor activities and attractions throughout the state.

February Vacation Opportunistic Radio - Live Reads & Endorsements
:10 & :15 copy read live by stations, as well as :30 & :60 copy used in hand-picked DJ endorsements (for example: Lisa Donovan from Kiss 108 on Matt in the Morning)
Air Dates: 1/30/12 - 2/12/12
Focused on getting out of the house on February vacation to take advantage of the skiing, tubing and cross-country skiing, driving to the seasonal Winter Fun microsite on Massvacation.com

April Vacation Opportunistic Radio - Live Reads & Endorsements
:10 & :15 copy read live by stations, as well as :30 & :60 copy used in hand-picked DJ endorsements (for example: Lisa Donovan from Kiss 108 on Matt in the Morning)
Air Dates: 4/9/12 - 4/22/12
For this radio campaign, we ran 2 promotions at 50% each. One message promoted our Mass Insider campaign, which enticed consumers to "like" MOTT's Facebook page for exclusive access to deals, giveaways and insider info on Massachusetts. The other message focused on the launch of our MassFinds Blog, where consumers could find under-the-radar things to do in Massachusetts, as well as in-depths looks at familiar favorites.

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

DIGITAL ADVERTISING

Fall Foliage Campaign

Display flash banners that focused on Massachusetts being a great destination to view fall foliage and for fall events, driving to our Fall Foliage Fun Planner.
Originally created in August/September 2010; Repurposed in Fall 2011
Ran on sites in Massachusetts & New York DMA - October 2011
Results:
15.5 Million Impressions
106,738 Visits to Site
.69% Click through rate

Winter Fun & Mass Insider Campaigns

Display flash banners that focused on all of the winter fun events and activities in Massachusetts. We created high-impact units with messaging specific to school vacation, that ran the week leading up and of February vacation, which includes homepage takeovers, pushdown units, and email blasts. We had another banner campaign promoting the Mass Insider program, which drove to MOTT's Facebook page in an effort to increase "likes" by offering exclusive access to deals, giveaways, insider tips, etc.

Winter Fun Creative - originally created in 2011; Repurposed for Winter 2012

Mass Insider Creative - originally created in 2011; Updated with a winter look and feel for 2012

Ran on sites in Massachusetts, New York DMA and Connecticut - December 2011 - March 2012.

We also hand-picked additional dates to run high-impact units on during the week leading up to Memorial Day Weekend and 4th of July. so that we would be serving up extremely timely and relevant content to users.

MassFinds Blog Creative - Created in Spring 2012. Mass Insider Creative - originally created in 2011; Repurposed for Spring 2012. Ran on sites in Massachusetts, New York DMA, Connecticut and Nationally - April 2012 - June 2012
Results:
63.2 Million Impressions
201,819 Visits to site
.32% Click through rate

Ask a Local Campaign

Results - 4,859 downloads of the mobile app
Mobile Banner Ads
Static mobile banners that featured MOTT's Ask a Local mobile app and drove to a page on Massvacation.com that explains the features and benefits of the app. Users could also go directly to the iTunes store from that page to download the app.

Ask a Local Creative - Created in Spring 2012
Ran on Boston.com's mobile site and mobile ad networks - May 2012 - June 2012

Pre-Roll Video Ads

We repurposed our :10 TV spots that focused on the Ask a Local app, into :10 web pre-roll videos. These videos ran in a variety of video ad networks as the advertising users see before the actual video content is displayed.

Ask a Local Video Creative - Originally created in Summer 2011; Repurposed for web use in Spring 2012

Ran on video ad networks targeting Massachusetts, which included sites like Yahoo! Weather Channel AOL Travel ABC New Huffington Post, and local station sites - May 2012 - June 2012

Social Media Ads

We ran various ad copy on Facebook and Twitter that consistently promoted whatever MOTT's seasonal effort was and also, the Mass Insider program. This year, we tested a new Facebook ad unit called, "Sponsored Stories", with the goal of surpassing 100K likes by June 2012. Sponsored stories show the brand/logo from MOTT's Facebook page and other friends who have liked the VisitMA page, with the idea being that if a user sees their friends liking a specific brand, that user will most likely "like" that brand as well.

Ran on Facebook & Twitter, targeting New England & New York DMA - January - June 2012

Pay-Per-Click Search Ads

We ran ad copy on Google, which aligned with the seasonal campaign/message that was running online at the same time.

Ran on Google, targeting Massachusetts & New York DMA - October 2011 & January 2012 - June 2012

NEW IN FY12…

Launch of MassFinds Blog...

MOTT's blog, MassFinds was created in Spring 2012 and launched on 3/21/12. The main focus of this blog is to highlight the lesser-known, below the radar activities across Massachusetts, along with unique slants and perspectives on the State's more familiar favorites. By posting rich content four times per week, the blog is significantly expanding the search term friendly and seasonally relevant catalog of content available on massvacation.com – this has had a very significant impact on the site's organic listing (SEO) ranking performance with search engines. We also provide readers/site visitors with the opportunity to interact with the blog via guest blogging or by suggesting a find by sending us ideas for the next blog post. Aside from the regular posts, we also feature a "Find of the Month" and "Find of the Week" which are both determined by overall post popularity: recommendations, number of likes, shares, comments, etc. The blog has been strategically integrated with MOTT's other other social media channels (Facebook, Twitter, Google+, and Pinterest) by giving the user the ability to tweet, Google Plus 1, Share or Like each blog post.

Social Media Growth

MOTT continues to grow their social presence on Facebook and Twitter, and in 2012, expanded to other social channels including Google+, Pinterest, YouTube, and Flickr. The channels have helped create a strong sense of brand affinity with consumers by engaging them in conversations, providing recommendations/insider tips, videos/photos of things to do and ultimately touting all that Massachusetts has to offer. MOTT's social channels have also contributed a significant amount of referral traffic to Massvacation.com, driving consumers to deeper content and vacation planning tools. Overall, our social channels have helped to keep Massachusetts top of mind and encouraged consumers to "Visit Massachusetts" often.

Online Video

Connelly Partners created (3) :10 web TV spots to promote the new Ask A Local mobile iPhone app. Each spot focuses on one of the app's key features: the ability to access insider tips for a specific restaurant, lodging property, or retail business, so that users can get local insight right on their phone. These ads are running as online pre-roll video and drive to the app download page on the iTunes App store. This campaign launched on 5/14/12 in the Boston and New York DMAs and ran through June 2012.

Mobile Texting Campaigns

MOTT introduced two mobile SMS text programs in FY12 designed to target smart phone users/heavy text'ers which skews toward the younger part of our demo. Skiing/Snowboarding: Each ski resort was given a text keyword (eg: MAWachusett). The resort then provided a deal of their choosing that was sent to consumers who requested it. The program was promoted via social, e-mail blast, and on the site. Anecdotal feedback from the industry was positive and helpful, during a slow winter season. Mass Insider TXT: During the spring & summer of 2012, consumers who text MA___ (super region) to a short code will receive a deal or event from that region.

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

PRINT

Opportunistic Print

"Storybook Mass Insider" Creative

Visual of an open book with various sights, attractions and things to do in Massachusetts, which changed depending on the timing of the insertion. The main message of the ad was to "like" MOTT's Facebook page for exclusive access to deals, giveaways and insider info in Massachusetts.

Originally created in Spring 2011; Repurposed in 2012

Ran in Boston - February - June 2012

Group Tour Print

"Ultimate Massachusetts Tour" Creative

Visual and copy representing a variety of things to do and see in Massachusetts, from historic to thrill-seeking.

Created in 2012

Ran Nationally & in New England - May & June 2012

Ethnic Print

"Storybook Mass Insider" Creative

Visual of an open book with various sights, attractions and things to do this summer in Massachusetts. The main message of the ad was to "like"

MOTT's Facebook page for exclusive access to deals, giveaways and insider info in Massachusetts. This copy was translated from English to other languages, depending on what multicultural publication the ad was running in.

Originally created in Spring 2011; Repurposed in 2012

Ran Nationally & in New England - May & June 2012

MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

LGBT MARKETING PROGRAM

In CY2012, MOTT enhanced the marriage resource microsite geared towards the LGBT community. The site contains information about how to get married in the Commonwealth of Massachusetts and simplifies the process for both residents and non-residents. In addition, the LGBT Facebook page had nearly 21,000 fans and the LGBT Twitter account surpassed 1,700 followers. The LGBT site had nearly 11,000 page views in CY2012.

GROUP TOUR

MOTT markets Massachusetts year round as a group travel destination, working proactively with tour operators and travel agents.

Group Tradeshows:

- Attended, maintained and created new relationships with tour operators as well as generating leads for the Massachusetts travel industry. Massachusetts (MOTT) attended American Bus Association Marketplace, Alliance Military Reunion and Cruise Canada New England Symposium.

Group Travel Advertising

- MOTT advertising can be found in Teach & Travel (SYTA publication), Packaged Travel Insider, Destinations, Courier, Black Meetings & Tourism and New England Group Travel Planner

Group Travel Promotions

- Massachusetts participated in the National Tour Association Tour Operator Profile Book.
- MOTT participated in welcoming the National Association of Motorcoach Operators during their annual meeting in Massachusetts.
- MOTT partnered with the Massachusetts Department of Agricultural Resources, hosting a Savor Massachusetts Culinary Farm Tour.

and other New England state tourism offices on joint group tour programs.

GOALS

Consistently educate domestic tour operators and travel agents on the newest Massachusetts product and position Massachusetts as a top group tour destination.

RESULTS

In FY2012, the Massachusetts group tour program generated 310 qualified leads from new and current tour operators who actively book groups to Massachusetts.

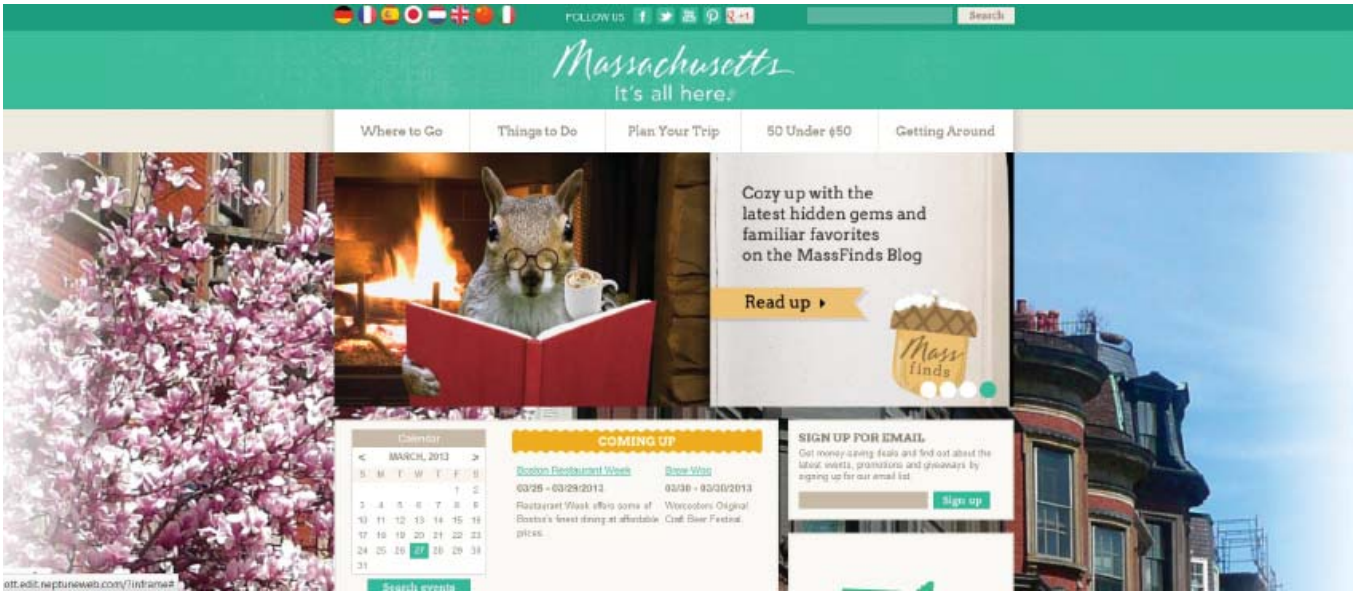
MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

massvacation.com

MOTT operates a highly interactive web site, massvacation.com, that provides users with comprehensive information about what to see and do, where to stay, and how to plan a trip. In CY12, for the third year, MOTT had seasonal micro sites for fall foliage and winter fun which generated high seasonal traffic. The site was also optimized and is performing very well in keyword searches in Google, Bing and Yahoo. Other content:

- Information centers
- Events up to 24 months in advance
- Mapping and travel directions
- Special lodging deals
- Special offers from MOTT's marketing partners
- Links to attractions, hotels, retail, restaurants and events.
- Ongoing contest to win a Massachusetts prize package
- Press Room
- Research

massvacation.com (cont.)



MOTT DOMESTIC MARKETING PROGRAMS AND RESULTS

CONSUMER DATABASE AND RELATIONSHIP MARKETING

Throughout 2012 MOTT continued to increase consumer database. This database is used to support the seasonal promotions, interest email program and text messaging. The primary source for acquiring new customers and for updating existing customer records is via www.massvacation.com. Our sign up forms comply with CAN-SPAM best practices.

GOVERNOR'S CONFERENCE

MOTT hosts the annual Governor's Conference on Travel & Tourism. 2012 marked its 25th year. The conference attracts more than 400 industry professionals who convene for networking with their colleagues from across the Commonwealth's travel sector. The conference features a Keynote by the Governor & Lt. Governor and presentations by other administrative leaders. The conference includes panel discussions, workshops and an industry marketplace with relevent information and tools for tourism professionals. In addition, the 25th anniversary was marked with the Larry Meehan Awards. Awards given in honor of one of the industries greatest advocates for Massachusetts, vice president of the GBCVB, Larry Meehan.

Massachusetts 25TH ANNUAL GOVERNOR'S CONFERENCE ON TRAVEL & TOURISM

PUBLIC RELATIONS

MOTT's public relations program aims to promote the Commonwealth as a premier leisure destination, rich in culture and diversity. The majority of the program's focus is on media relations, gaining valuable third-party endorsements from respected travel press, and in turn, influencing consumer behavior when it comes to visiting Massachusetts

As a result of MOTT's public relations efforts, Massachusetts has enjoyed positive coverage in the nation's top circulating publications, regional newspapers and magazines and online travel and lifestyle sites.

JOURNALISTS TO MASSACHUSETTS

MOTT works closely with Massachusetts' lodging facilities and attractions to stay up-to-date on their services and special events, in order to serve as an information resource to journalists wishing to visit the state. Working personally and directly with journalists, MOTT packages tours throughout the commonwealth for coverage on line, in print and on the radio.

Through the efforts of MOTT's public relations team, journalists representing the following publications visited the Commonwealth in CY2010:

AAA New England
About.com Guide to New England for Visitors
American Spa
Boston Courant
Boston Globe
Boston Herald
Boston Magazine
Boston Metro
Connecticut Magazine
Country Living
Destinations of the World
Edge Publications
Executive Profile
Family.com
Gayot.com
Hartford Courant
Improper Bostonian

Inside Reel
Instinct Magazine
Journey Magazine
Lawrence Eagle-Tribune
New York Post
New York Times
NY Daily News
Out & About
Pathfinders
Philadelphia Daily News
Spectrum
Taking-the-Kids
Travel & Leisure
Traveltowellness.com
Valley Scene Magazine
Worldtravelguide.net

LOCAL AND NATIONAL CONSUMER BUSINESS AND TRADE MEDIA RELATIONS

MOTT regularly researches, prepares and distributes press releases that cover a wide range of topics aimed to stimulate media interest. In FY2012, MOTT distributed the following releases:

Family Fun

Peak Season

Holidays in MA

Working Farms

Get Yor Adrenaline Pumping

Winter Ski Packages

Female Chefs

Arts in Massachusetts

Presidential Lodging

Black History

April School Vacation Week

Pride Events

Dining by the Water

Gardens

MASSVACATION.COM PRESS ROOM

In CY2012 MOTT further updated its press room with new images, information, press materials, and story ideas. In addition, HD footage is available free of charge to promote the state via broadcast. The press room also posts leads for the entire industry to take advantage of, and get the opportunity to, showcase their properties, attractions or events for interested journalists. Our image library is now located on Flickr.

SUPPORT ADVERTISING AND MARKETING PROGRAMS

MOTT's integrated marketing team launched a new and innovative campaign in FY2012 with a new social media strategy and blog called MassFinds, highlighting the little known places in Massachusetts. The public relations group promoted the campaign in national and regional trade and consumer press. Coverage appeared in the following press:

The BostonChannel.com/Boston Globe

Associated Press

Boston Herald

NECN

NY1

NY DMO Tagrets

MOTT INTERNATIONAL MARKETS OVERVIEW

STRATEGY

To market and promote Massachusetts as a premier travel destination in primary international markets (Canada, United Kingdom, and Germany) and in secondary markets (Ireland, Japan, France, Italy.

MOTT contracts with destination marketing agencies in its primary and secondary markets to implement comprehensive promotional programs.

Marketing and public relations activities include, but are not limited to: ongoing proactive travel trade outreach, international travel trade and consumer shows, destination training programs, cooperative marketing with in-market travel partners, familiarization (FAM) tours, media relations, and consumer promotions. MOTT has increased its presence in Canada and has entered into partnerships with various tour programs and outlines.

TRAVEL TRADE PROMOTION

MOTT's travel trade promotion consists of proactive outreach to tour operators whose brochures feature New England and Massachusetts product. MOTT works to secure current product, to expand product offering, to support cooperative opportunities (consumer promotion, direct mail, point of purchase, etc.), and to assist in itinerary development. As needed, MOTT will provide tour operators with videos, promotional items, and literature to support promotion.

MOTT works in partnership with major airlines in each primary and secondary market to develop cooperative promotions.

MEDIA RELATIONS

Media relations conducted in MOTT's primary and secondary markets generate valuable earned media coverage for the state. MOTT's in-market agencies provide story ideas, issue press releases, develop/distribute e-newsletters, and respond to image/b-roll requests. In fiscal year 2012, the earned media value totaled $14.0 million.

INDUSTRY PARTICIPATION

Familiarization Tours; Event Information; Thematic Itineraries New Product; Imagery; Events/Shows: Governor's Conference, Pow Wow, Discover New England Summit

International Visits to MA & Share

CY2011

	Visitor Volume (000)s	Share of Country Market
ALL OVERSEAS	1,422	5.1%
EUROPE	709	5.6%
Canada	678	3.4%
United Kingdom	222	5.8%
PROC (china)	139	12.8%
Germany	120	6.6%
France	69	4.6%
Australia	65	6.3%
Brazil	54	3.6%
Italy	54	6.1%
India	50	7.5%
South Korea	50	4.4%
Japan	49	1.5%
Argentina	34	6.7%

MOTT INTERNATIONAL MARKETS OVERVIEW

Canada	
Marketing Firm:	VOX International Inc
Visitation to MA (2011):	678,000 Visitors
Est. Visitor Spending (2011):	$457 M
Est. MA State Taxes (2011):	$27 M

United Kingdom	
Martketing Firm:	Travel & Tourism Marketingi
Visitation to MA (2011):	5222,000 Visitors
Est. Visitor Spending (2011):	$305 M
Est. MA State Taxes (2011):	$19 M

Germany	
Marketing Firm:	Buss Consulting
Visitation to MA (2011):	122,000 Visitors
Est. Visitor Spending (2011):	$143 M
Est. MA State Taxes (2011):	$9 M

Japan	
Marketing Firm:	Global Consulting
Visitation to MA (2011):	49,000 Visitors
Est. Visitor Spending (2011):	$103 M
Est. MA State Taxes (2011):	$7 M

SOURCE: DEPT. OF COMMERCE, OTTI

Italy	
Marketing Firm:	Thema Nuovi Mondi
Visitation to MA (2011):	54,000 Visitors
Est. Visitor Spending (2011):	$73 M
Est. MA State Taxes (2011):	$5 M

France	
Marketing Firm:	Express Conseil
Visitation to MA (2011):	69,000 Visitors
Est. Visitor Spending (2011):	$86 M
Est. MA State Taxes (2011):	$5 M

China	
Marketing Firm:	Thema Nuovi Mondi
Visitation to MA (2011):	139,000 Visitors
Est. Visitor Spending (2011):	$143 M
Est. MA State Taxes (2011):	$9 M

MOTT REGIONAL GRANT PROGRAM

REGIONAL TOURIST COUNCILS AND REGIONAL TOURISM GRANT PROGRAM

Massachusetts' 16 Regional Tourist 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 (50%), their marketing plans (30%), and their abilities to raise matching funds (20%).

RTC FY2013 Final Summary	
Regional Tourist Council	Allocation
Berkshire VB	$316,055.36
SE Mass CVB	$791.33
Cape Cod Chamber	$537,690.01
Franklin County Chamber	$234,402.22
Greater Boston CVB	$2,209,966.34
Merrimack Valley CVB	$327,568.15
Greater Springfield CVB	$345,765.09
Martha's Vineyard Chamber	$292,614.65
Nantucket Chamber	$237,710.83
North of Boston CVB	$262,449.00
Plymouth County CVB	$316,057.06
Central Mass CVB	$288,895.60
MetroWest	$185,009.32
JohnnyApplseed	$135,004.83
Hampshire	$180,540.21
Mohawk Trail Association	$129,480.00
TOTAL:	$6,000,000.00

Source: MOTT

*Note In calendar year 2009 the Travel Industry Association (TIA) became the United States Travel Association (USTA).

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Greater Boston CVB

Berkshire Visitors Bureau

Greater Merrimack Valley CVB

Mohawk Trail Association