

# NEW ENGLAND'S TRAVEL AND RECREATION MARKETS: TRENDS IN THE GEOGRAPHIC TARGET MARKETS BEYOND 2000

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**Abstract.**—The purpose of this paper was to re-examine and update geographic travel and lifestyle activity market trends for those areas targeted by New England destinations beyond the year 2000. The central theme was to examine in detail the primary, secondary and tertiary geographic markets targeted by New England destinations through both travel behavior and lifestyle behavior from 1995 through 2005.

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## 1.0 INTRODUCTION

In 2000, a multi-year analysis (1993 to 1999) identified the trends in the major geographic markets targeted by New England destinations (Warnick 2000). A great deal has changed in the past six years. In a post 9/11 era, the U.S. is now engaged in a global war on terrorism, interest rates have begun to creep upward; the price of gasoline has exceeded \$3 per gallon; and the front end of a huge market of active retirees—the Baby Boomers—is just being to impact the travel markets. A great deal of speculation and concern was stated post 9/11 as to the long-term impacts on travel and tourism. New England as a relatively compact region with major markets within easy driving distances was felt to be less vulnerable to substantial downturns in the travel sectors. However, this was also the geographic area where the terrorism had its most devastating impact—on New York City, Washington, D.C., and rural Pennsylvania. Furthermore, long-term trend analysis has not been conducted to truly monitor the geographic market conditions for travel and related recreational lifestyle pursuits in a post 9/11 environment.

Studies in the 1990s (Warnick 1992a, 1992b, 1993, 1996, 1999) indicated domestic travel in the Northeast and New England had become a mature market and

finally showed signs of recovery in the mid-1990s. The 2000 study (Warnick 2000) of New England geographic travel markets indicated travel had rebounded and increased between 1993 and 1999 for each of the geographic markets (primary, secondary, and tertiary) and was especially strong in the vacation travel sector. From that study, six major findings documented lifestyle activity preferences and trends. Tennis and bicycling held strong growth patterns in the major markets and golf continued to grow across a number of the geographic markets but at a slower pace than documented in previous studies. Skiing activities still held higher than national average household participation rates, and these markets continued to grow at a more moderate pace. Interest in camping, hiking, and fishing held strong growth patterns in the region. Activity interest in hunting, snow skiing, and camping and hiking varied widely across the various New England geographic markets. The trend analysis data also revealed that interest in fitness activities remained stable and interest in cultural activities and heritage continued to grow across a number of geographic markets.

New England remains easily one of the nation's most definable regions, is a relatively compact region, is close to the megalopolis of East Coast cities, and is a highly desirable and nostalgic geographic market to visit in most consumers' minds. New England's tourism and recreation attraction industry is very well defined, and four of the six New England states possess significant tourism- and recreation-based economies. Thus, careful monitoring of trends in tourism and recreation activities by geographic markets is critical.

## 2.0 PURPOSE OF STUDY

The purpose of this study is to examine in detail the geographic markets targeted by New England destinations through the lifestyle and geographic profiling. The first trend study (Warnick 1996) of geographic markets covered the period only through the mid-1990s and then the next study (Warnick 2000) covered the period from the mid-1990s through 1999. This study updated those findings and provided trend

analysis from 1995 through 2005 and examined the impacts of 9/11 in the participation rates of households within the various geographic markets of New England.

### 3.0 METHOD

In the previous studies, the major database employed to examine trends was Standard Rate and Data Service's (SRDS) *Lifestyle Market Analyst* (1993 through 1996; then 1993 through 1999). With data now available through 2005, the line of research and trend analysis was updated and expanded. The SRDS data are collected consistently the same way each year and provide an excellent foundation for long-term trend analysis. These data provide activity patterns for 17 geographic metro markets that New England destinations would commonly target. For the purposes of this study, several statistical variables were used to describe the trends in these data.

The descriptive statistics used included an average annual adjusted percent change rate and a three-year moving average for the SRDS data. Participation rates of households were used as primary variables to examine the overall trends. The trends analysis of the geographic target markets of New England-based destinations included three major sub-regions—primary, secondary, and tertiary markets. The analysis examined the associated lifestyle trends within these markets both combined and separately. Primary markets included those target market metro areas within a three-hour drive of the center of New England, and included the geographic metro areas of Albany, NY; Bangor, ME; Boston, MA; Burlington, VT; Hartford/New Haven, CT; New York, NY; Portland/Auburn, ME; Providence/New Bedford, RI/MA; and Springfield, MA. Secondary markets included those target market areas from a three- to six-hour drive of New England and included the geographic metro areas of Philadelphia, PA; Scranton/Wilkes-Barre, PA; Harrisburg, PA; and Syracuse, NY. Tertiary markets include those target market metro areas in excess of six hours' drive time and included the geographic metro markets of Baltimore, MD; Cleveland, OH; Pittsburgh, PA, and Washington, DC. These markets (primary, secondary and tertiary) collectively will be referred to as the "New England market area." Activity clusters for each geographic market were grouped into travel, recreation and sport, outdoor recreation, fitness, and

cultural/heritage markets. The travel market lifestyle includes activities of domestic travel (100 miles or more, overnight) and vacation travel. The recreation and sport market lifestyle includes activities of golf, tennis, skiing, and bicycling. The outdoor recreation lifestyle includes activities of interest in wildlife and environment, hiking and camping, hunting and shooting, and fishing. The physical fitness lifestyle includes fitness walking and fitness programs. The cultural and historic interests lifestyle includes activities of attending cultural/arts events and interests in our nation's heritage.

These targeted metro or geographic market areas for New England destinations were examined to determine if changes in these lifestyle interests had occurred between 1995 and 2005. Household participation data are reported here for 1995, 2000, and 2005 due to space limitations although each year was included from 1995 through 2005 in the overall analysis. The lifestyle interests within these markets were also compared by a within market area analysis, (e.g., metro areas within the primary markets were compared), to the national market, and to the entire region examined (e.g., the primary, secondary, and tertiary geographic markets combined or the New England market area). Trends were identified on a change scale of strong decline (decline of 2% or more per year); decline (0 to -2% per yr); no growth (at or near 0% per year or less than 1% per year); stable (positive, but less than 2% per year); growth (2% to 4% per year) and strong growth (>4% per year) during the 1995 through 2005 period. For comparative purposes, rates and trends were also reported at the national level and overall New England market area for 1995 to 2000 and 1995 to 2005. Household growth rates were about 1 percent per year, so growth not exceeding this rate should be classified as "no growth." SRDS data are presented as household participation data expressed as a three-year moving average. Thus, data from 1995 are an average of data from 1993, 1994, and the new year 1995 and so on for each new year. The data actually also represent household participation as far back as 1992 even though the data reported are labeled as 1995 data. This is due to how the data are collected and reported. The actual reporting year data was collected from the period of November through November of the previous year; so, actual reporting data for 2005, for example, would

**Table 1.—Travel activities rates for New England markets for 2005 with trends for 1995 to 2005**

	Travel	Travel Trend	Vacation Travel	Vac. Trav Trend
1995 National Rates	34.9%	--	37.5%	--
2000 National Rates	42.5%	G	37.9%	SG
2005 National Rates	36.8%	G	39.5%	G
1995 All NE Markets (Prim, Sec., Tert.)	36.1%	--	39.4%	--
2000 All NE Markets (Prim, Sec., Tert.)	39.0%	S	46.6%	SG
2005 All NE Markets (Prim, Sec., Tert.)	37.7%	S	42.1%	NG
2005 Primary Markets:	38.2%	S	44.6%	NG
Albany, NY	36.8%	NG	42.3%	NG
Bangor, ME	32.2%	NG	29.7%	D
Boston	38.8%	NG	48.1%	G
Burlington/Plattsburgh, NY	35.7%	S	43.1%	G
Hartford/New Haven, CT	38.2%	NG	44.0%	NG
New York City Metro	38.8%	S	46.2%	NG
Portland/Auburn, ME	35.1%	S	36.7%	D
Providence/New Bedford, RI/MA	36.4%	NG	44.6%	D
Springfield, MA	35.9%	NG	39.8%	NG
2005 Secondary Markets:	36.6%	S	37.8%	D
Philadelphia	37.8%	NG	40.0%	D
Scranton-Wilkes Barre, PA	33.8%	S	31.5%	D
Harrisburg, PA	35.4%	S	34.5%	D
Syracuse, NY	33.8%	D	39.1%	NG
2005 Tertiary Markets:	37.5%	S	39.8%	D
Baltimore	37.5%	S	39.6%	NG
Cleveland	37.6%	NG	34.9%	D
Pittsburgh	34.4%	S	32.3%	D
Washington, DC	39.0%	S	47.2%	G

Key: SD=Strong Decline (>-2%/yr). D=Decline (>0 to -2%/yr). NG= No Growth (at or near %/yr). S=Stable (positive, but less than 2%/yr). G=Growth (2% to 4%/yr.). SG=Strong Growth (>4%/ yr). National and regional 2000 trends measure 1995 to 2000.

reflect data collection from the November 2003 through November 2004. The reporting year representing the first real impact of 9/11 would then be 2003, when data were reported from November 2001 to November 2002 and reported in 2003.

## 4.0 SELECTED FINDINGS

The findings here are grouped into travel markets, sports and recreation, outdoor recreation, fitness activities, and interest in cultural and history/heritage events by primary, secondary, and tertiary markets of the New England Region.

### 4.1 Travel Lifestyle Activity by Geographic Markets

In this study, overall national travel trends indicated a growth pattern from 1995 through 2000, but the trends

depicted no growth between 1995 and 2005. While domestic travel did grow nationally, the overall New England travel markets were stable or no-growth markets within the primary, secondary, and tertiary markets. Vacation travel, however, was much more volatile in terms of overall trend patterns. Table 1 contains the participation and trend data for domestic travel and vacation travel.

### 4.2 Domestic Travel Lifestyle

New England's primary markets were overall stable for domestic travel. No markets actually grew over the period. While each of the main geographic markets (primary, secondary, and tertiary) indicated a stable trend between 1995 and 2005, no major metro area experienced a growth trend. Metro areas with the highest participation rates for travel were Boston (38.8%), New

York Metro (38.8%), and Washington, DC (39.0%). The primary and tertiary geographic markets of New England held overall rates that were higher than the national average. Washington, DC, with the highest participation rate for domestic household travel, held only a stable trend. A better indicator for tourism travel is “vacation travel” as collected by SRDS.

### **4.3 Vacation Travel Lifestyle**

The national vacation travel market increased in excess of 4 percent per year by households from 1995 through 2002 and the regional participation rate for vacation travel was nearly eight percent higher than the national average for the same period. However, this trend changed drastically after 2002 for the overall New England geographic market, when 42.1 percent of all households participated in vacation travel. The downturn in participation appears to have caused the overall trend to slow for the period of 1995 through 2005. The trends indicated no growth for the primary market and declines in both the secondary and tertiary markets. Within New England’s primary markets, only two metro areas held growth trends in excess of 2 percent per year—Boston and Burlington/Plattsburgh. Four metro areas experienced no growth over the period (Albany, Hartford/New Haven, New York City Metro, and Springfield) while three markets actually declined in household participation in vacation travel (Bangor, Portland/Auburn, and Providence/New Bedford). New England’s secondary and tertiary geographic markets both experienced overall decline in vacation travel for the period of 1995 to 2005. The only metro area within these two regions to actually experience any growth in vacation travel was Washington, DC where the household vacation participation rate stood at 47.2 percent in 2005.

### **4.4 Recreation and Sport Lifestyle Market Activity by Geographic Markets**

The activity with the strongest growth during this period was biking. Over 19 percent of all households in the total market area participated, and the growth trend exceeded 2 percent per year, reflecting the national average. All four activities experienced strong national growth trends from 1995 through 2000; however, these trends slowed after 2000. Recreation and sport lifestyle markets may be found in Table 2.

### **4.5 Golf Lifestyle**

The regional rates were slightly lower than the national participation rates for golf, and the regional trend pattern indicated overall decline. There were no growth markets throughout the regional markets. In fact, 11 of the 17 metro markets indicated a decline in participation rates for golf from 1995 to 2005. Only three markets (Bangor, Portland/Auburn, and Scranton-Wilkes Barre) were stable. However, substantial variation existed within the areas for golf even in the recent years. For example, Albany, NY (21.5%); Boston (20.2%), and Springfield (20.1%) held household participation rates higher than the national average (19.2%) for golf and even the overall New England regional average of 17.7 percent in 2005. Other markets, New York City (14.9%) and Bangor, ME (15.7%), held much lower rates even though these markets were not declining. Overall, the secondary and tertiary markets are more active golf markets than the primary markets for golf with several of these metro markets holding rates in excess of 20 percent (Syracuse, NY-23.9%; Cleveland, OH-23.5%; and Pittsburgh, PA-21.2%). However, even these markets actually experienced a decline from 1995 to 2005.

### **4.6 Tennis Lifestyle**

Tennis sustained some growth in the 1995 to 2000 trend period; but remained stable throughout the period of 1995 to 2005. The New England regional market held rates that were higher than the national averages. The stability in the participation rates for tennis appeared to be supported by the three major metro areas of New York City (9.1% rate and stable trend); Boston (8.6% rate and growth trend); and Washington, DC (9.8% rate and stable trend) over the period of 1995 to 2005. Bangor and Portland/Auburn both experienced strong growth trends during the period. All other secondary and tertiary market areas experienced either stable or moderate growth for tennis from 1995 to 2005.

### **4.7 Bicycling Lifestyle**

All metro areas in the New England market area either grew or remained stable and the regional participation rate equaled the national rate for biking. Primary metro areas with high bicycling rates in 2005 include Springfield, MA (21.1%) and Burlington, VT (23.7%);

**Table 2.—Recreation and sport activity rates for New England markets for 2005 with trends for 1995 to 2005**

Markets	Golf	Golf Trend	Tennis	Tennis Trend	Ski	Ski Trend	Bike	Bike Trend
1995 National Rates	19.8%	--	5.8%	--	7.4%	--	17.1%	--
2000 National Rates	21.6%	SG	7.8%	SG	9.5%	SG	24.2%	SG
2005 National Rates	19.2%	D	6.8%	G	8.3%	G	19.3%	G
1995 All NE Markets (Prim, Sec., Tert.)	18.3%	--	6.9%	--	8.8%	--	16.2%	--
2000 All NE Markets (Prim, Sec., Tert.)	20.4%	G	9.1%	SG	11.0%	G	24.3%	SG
2005 All NE Markets (Prim, Sec., Tert.)	17.7%	D	7.7%	S	9.6%	S	19.3%	G
2005 Primary Markets	17.0%	NG	8.2%	S	10.9%	NG	19.8%	S
Albany, NY	21.5%	D	4.8%	D	12.5%	D	20.9%	G
Bangor, ME	15.7%	S	4.6%	SG	12.4%	NG	17.2%	S
Boston	20.2%	D	8.6%	G	14.5%	S	20.0%	S
Burlington/Plattsburgh, NY	17.7%	NG	6.7%	S	20.4%	NG	23.7%	G
Hartford/New Haven, CT	19.7%	D	7.5%	NG	10.7%	D	19.2%	G
New York City Metro	14.9%	NG	9.1%	S	12.1%	NG	19.6%	G
Portland/Auburn, ME	17.7%	S	6.3%	SG	16.0%	NG	20.4%	SG
Providence/New Bedford, RI/MA	18.6%	D	6.9%	G	9.6%	NG	19.9%	S
Springfield, MA	20.1%	D	5.7%	S	10.3%	D	21.1	S
2005 Secondary Markets	17.9%	D	6.5%	S	8.0%	S	18.2%	G
Harrisburg, PA	18.5%	D	5.8%	S	6.6%	S	17.4%	G
Philadelphia	17.3%	D	7.3%	S	8.2%	S	18.9%	S
Scranton-Wilkes Barre, PA	16.8%	S	4.2%	G	7.4%	S	15.5%	G
Syracuse, NY	23.9%	D	5.6%	S	10.4%	D	19.2%	G
Tertiary Markets	19.4%	D	7.3%	S	7.8%	S	19.0%	G
Baltimore	15.9%	D	7.7%	S	7.9%	S	18.0%	S
Cleveland	23.5%	D	5.4%	G	6.3%	G	20.5%	G
Pittsburgh	21.2%	D	4.8%	S	7.1%	S	16.4%	SG
Washington, DC	17.2%	NG	9.8%	S	9.2%	S	19.5%	S

Key: SD=Strong Decline (>-2%/yr). D=Decline (>0 to -2%/yr). NG= No Growth (at or near %/yr). S=Stable (positive, but less than 2%/yr). G=Growth (2% to 4%/yr.). SG=Strong Growth (>4%/ yr). National and regional 2000 trends measure 1995 to 2000.

seven of the nine areas have rates in excess of the national rate of 19.3 percent. The overall rates in the secondary markets are not as high. Philadelphia (18.9%) and Syracuse (19.2%) are highest here. In the tertiary markets, Cleveland has the highest rate of 20.5 percent and Pittsburgh the lowest with only 16.4 percent participating; but Pittsburgh also experienced a strong growth trend from 1995 to 2005.

#### 4.8 Skiing Lifestyle

Skiing has traditionally enjoyed higher participation rates in the New England market area due to the proximity of many ski resorts and facilities. The market area rates maintained higher participation rates than the national rates throughout the 1995 to 2005 period.

However, the growth trend rates appeared to be not as strong in the New England market as compared to the national markets. Four of the major metro area (Albany, Hartford/New Haven, Springfield, and Syracuse) actually experienced declines in participation rates during the review period. Rates for skiing do vary considerably even within the primary market. Primary metro areas with high skiing rates in 2005 include Burlington/Plattsburgh (20.4%), Portland/Auburn (16%), and Boston (14.5%). This compares to a regional participation rate for skiing in the primary market area of 10.9 percent in 2005. Overall, the primary area experienced no growth in participation from 1995 to 2005. The secondary and tertiary market areas maintained stable participation rate trends from 1995 to 2005.

**Table 3.—Outdoor activity rates for New England markets for 2005 with trends for 1995 to 2005**

Markets	Wildlife	Wildlife Trend	Camp/Hike	Camp/Hike Trend	Hunt	Hunt Trend	Fish	Fish Trend
1995 National Rates	16.4%	--	22.6%	--	15.4%	--	23.8%	--
2000 National Rates	18.6%	D	28.4%	G	18.2%	S	30.6%	SG
2005 National Rates	15.1%	D	28.0%	G	18.0%	S	29.6%	G
1995 NE Mrkts (Prim,Sec.,Tert,)	16.9%	--	17.0%	--	11.0%	--	17.3%	--
2000 NE Mrkts (Prim,Sec.,Tert,)	18.6%	D	24.2%	SG	12.8%	S	22.9%	SG
2005 NE Mrkts (Prim,Sec.,Tert,)	14.9%	D	21.4%	G	12.6%	S	22.0%	G
2005 Primary Markets	15.7%	D	20.5%	G	10.0%	S	20.3%	G
Albany, NY	18.9%	NG	32.3%	G	18.5%	S	27.6%	G
Bangor, ME	21.1%	D	40.4%	G	31.6%	S	40.2%	S
Boston	16.3%	D	24.8%	G	9.3%	S	20.7%	G
Burlington/Plattsburgh, NY	22.0%	NG	37.8%	SG	27.7%	S	33.9%	G
Hartford/New Haven, CT	16.3%	NG	23.5%	G	11.0%	S	22.5%	G
New York City Metro	14.5%	D	15.3%	G	7.7%	S	18.2%	G
Portland/Auburn, ME	20.8%	D	37.9%	S	22.1%	S	32.5%	G
Providence/New Bedford, RI/MA	14.9%	D	22.5%	G	8.7%	S	21.9%	G
Springfield	17.8%	NG	27.6%	SG	12.9%	S	25.3%	G
2005 Secondary Markets	15.9%	D	22.3%	G	16.5%	S	24.6%	G
Harrisburg, PA	16.9%	NG	28.5%	G	25.1%	S	27.0%	G
Philadelphia	15.1%	D	18.8%	G	11.8%	S	22.1%	G
Scranton-Wilkes Barre, PA	17.7%	S	27.4%	G	28.3%	S	31.8%	S
Syracuse, NY	18.3%	NG	32.3%	G	20.3%	S	29.3%	G
2005 Tertiary Markets	14.7%	D	22.7%	G	15.3%	S	23.6%	G
Baltimore	15.0%	D	20.1%	G	12.2%	S	22.5%	G
Cleveland	14.6%	D	25.3%	G	14.7%	G	25.7%	SG
Pittsburgh	14.8%	NG	25.0%	G	22.7%	SG	26.6%	G
Washington, DC	14.5%	D	21.1%	G	13.3%	G	21.1%	G

Key: SD=Strong Decline (>-2%/yr). D=Decline (>0 to -2%/yr). NG= No Growth (at or near %/yr). S=Stable (positive, but less than 2%/yr). G=Growth (2% to 4%/yr.). SG=Strong Growth (>4%/ yr). National and regional 2000 trends measure 1995 to 2000.

#### 4.9 Outdoor Recreation Lifestyle Market Activity by Geographic Markets

The activities with overall national growth trends during this period were fishing and camping/hiking, and the same activity trends were noted in the New England market area for this review period. This cluster of activities also revealed wide variability in household participation rates within the metro markets. For example, the rates for camping and hiking topped 40.4 percent in Bangor, ME, and grew during the period. In contrast, only 15.3 percent in the New York City metro area participated in camping and hiking. Similar patterns of wide variability were also found in hunting and fishing. After years of growing interest in wildlife and the environment, the rate of interest within the New England market (14.9%) has declined. Hunting enjoyed a stable pattern of activity during the 1995 to 2005 period both

nationally and in the New England market area, but in 2005 the rate was 18 percent nationally while only 12.6 percent in the New England market. Although the fishing rates for the overall region demonstrated growth, the household rate for the New England region (22.0%) is still below the national rate (29.6%). Participation rates and trends for the outdoor recreation activities may be found in Table 3.

#### 4.10 Interest in Wildlife & Environment

The household participation rate (14.9%) for interest in the environment and wildlife in the New England market area in 2005 was about the same rate as the national rate (15.1%). Rates in nine of 17 metro areas declined with only one metro area in the secondary market (Scranton-Wilkes Barre) experiencing a stable trend in interest. However, all but two metro areas (Providence/New

Bedford and New York City) had rates above the regional and national rates for the activity.

#### **4.11 Camping/Hiking Lifestyles**

Fourteen of the 17 metro areas in the New England market area showed growth trends patterns for camping and hiking. Two metro markets (Burlington/Plattsburgh and Springfield) within the region experienced strong growth trends, but rates varied widely across the region. New York held a 15.3 percent household participation rate and Bangor, ME, a 40.4 percent rate in 2005. In the primary market, all markets except New York City held higher participation rates than both national and regional rates. All market areas in the primary geographic region experienced growth in participation rates with the exception of Portland, ME (37.9% in 2005), where the trend remained stable. Rates for camping and hiking also varied widely in the primary market. Rates were highest in Bangor (40.4%), Portland/Auburn (37.9%), and Burlington/Plattsburgh (37.8%), and lowest in Boston (24.8%), and New York City (15.3%). The secondary market area had only one market area (Philadelphia) with below-average participation rates for camping/hiking. All markets revealed growth trends. All of the tertiary markets held strong growth trends for camping/hiking. Cleveland (25.3%) held the highest participation rate for camping and hiking.

#### **4.12 Hunting Lifestyles**

The New England regional trend pattern for hunting was stable and increased slightly from 11.0 percent in 1995 to 12.6 percent in 2005, but these rates were still lower than the national rates. The overall rates within the region were stable across the primary, secondary, and tertiary markets for hunting. The only region with sustained growth within metro areas was the tertiary region, including Pittsburgh (2005 participation rate of 22.7 percent and strong growth trend, Cleveland (2005 participation rate of 14.7 percent and growth trend pattern), and Washington, DC (2005 participation rate of 13.3 percent and growth trend pattern). Rates varied widely within the region, too. New York held a 7.7 percent household participation rate for hunting while Bangor, ME held a 31.6 percent rate. No metro markets within any of the market areas experienced decline in participation rates for hunting from 1995 to 2005.

#### **4.13 Fishing Lifestyles**

The New England regional trend for fishing also indicated growth, and participation increased from 17.3 percent in 1995 to 22.0 percent in 2005. The overall rates within the region also grew across the primary, secondary, and tertiary markets. However, the only metro area with strong growth (in excess of 4% per year) was Cleveland, where fishing participation rates stood at 25.7 percent in 2005, up from 20.9 percent in 1995. Participation rates also varied considerably even within the regional market. For example, in the primary geographic market, New York held an 18.2 percent household participation rate for fishing while Bangor, ME held a 40.2 percent rate. None of the 17 metro markets experienced overall decline trends for fishing from 1995 to 2005.

#### **4.14 Fitness Lifestyle Market Activity by Geographic Markets**

Over 31 percent of the New England market area households engaged in fitness walking in 2005, but this participation rate is down from a peak of 38.6 percent in 2000. For fitness and exercise program participation, the trends within the New England region market area remained stable over the 1995 to 2005 period. In 2005, 40.7 percent participated in a fitness/exercise program within the New England region market area. All markets experienced a decline in fitness walking, but stability was maintained in exercise and fitness program participation for the region.

#### **4.15 Fitness Walking Lifestyles**

In the primary markets, eight of the nine markets actually declined in participation; only Portland/Auburn actually grew during this period and held the highest participation rate (36.3%) for fitness walking of all the metro areas within this market area. In the secondary and tertiary markets, all metro areas experienced declines in fitness walking.

#### **4.16 Fitness/Exercise Program Lifestyle**

The collective primary, secondary, and tertiary markets overall remained stable from 1995 through 2005. Thirteen of the 17 the metro market areas were stable in fitness and exercise program participation trend patterns. Within the primary market, both Portland, ME (36.3%) and Bangor (35.0%) were growth markets.

**Table 4.—Fitness and cultural/historic activity rates for New England markets for 2005 with trends for 1995 to 2005.**

Markets	Fitness Walk	Fit Walk Trend	Fit./Exer	Fit/Ex. Trend	Cult. Activity	Cult.Act. Trend	Hist. & Heritage	Hist. Herit. Trd
1995 National Rates	34.3%	--	34.0%	--	13.6%	--	4.9%	--
2000 National Rates	36.9%	S	41.9%	S	19.8%	SG	7.4%	G
2005 National Rates	31.3%	D	39.3%	S	14.8%	S	6.8%	G
1995 All NE Markets	34.6%	--	35.3%	--	15.6%	--	5.0%	--
2000 All NE Markets	38.6%	S	44.1%	S	22.9%	SG	7.8%	G
2005 All NE Markets	31.1%	D	40.7%	S	17.1%	S	6.8%	G
2005 Primary Markets	31.6%	D	41.2%	S	17.9%	S	6.4%	G
Bangor, ME	35.0%	D	36.2%	G	12.6%	G	6.5%	G
Portland/Auburn, NE	36.3%	G	39.7%	G	14.9%	G	7.2%	G
Boston	32.5%	D	42.5%	S	17.8%	S	6.5%	G
Burlington/Plattsburgh, NY	33.8%	D	38.9%	S	14.6%	S	7.0%	G
Albany, NY	33.2%	D	38.2%	S	15.7%	S	7.8%	G
Springfield, MA	34.1%	D	39.7%	S	16.0%	S	6.6%	G
Hartford/New Haven, CT	32.9%	D	40.9%	S	17.5%	S	6.7%	SG
Providence/New Bedford, RI/MA	33.8%	D	39.3%	S	15.5%	S	6.3%	G
New York City Metro	30.4%	D	41.7%	S	18.9%	S	6.2%	G
2005 Secondary Markets	30.8%	D	39.0%	S	15.2%	G	7.2%	SG
Harrisburg, PA	31.0%	D	36.6%	G	13.6%	S	8.2%	SG
Philadelphia	30.7%	D	40.9%	S	16.5%	S	7.2%	SG
Scranton-Wilkes Barre, PA	32.2%	D	34.6%	G	11.8%	G	6.9%	G
Syracuse, NY	31.9%	D	38.6%	S	14.0%	G	6.9%	G
2005 Tertiary Markets	30.3%	D	40.9%	S	16.6%	S	7.2%	G
Baltimore	29.7%	D	40.5%	S	16.8%	S	7.3%	G
Washington, DC	29.1%	D	43.7%	S	19.3%	NG	8.0%	G
Pittsburgh	32.5%	D	37.8%	S	14.0%	S	6.9%	SG
Cleveland	31.0%	D	39.3%	S	14.3%	S	6.2%	G

Key: SD=Strong Decline (>-2%/yr). D=Decline (>0 to -2%/yr). NG= No Growth (at or near %/yr). S=Stable (positive, but less than 2%/yr). G=Growth (2% to 4%/yr.). SG=Strong Growth (>4%/ yr). National and regional 2000 trends measure 1995 to 2000.

All others were stable. Boston (42.5%) held the highest participation rate for fitness programs. In the secondary markets, Harrisburg (36.3%) and Scranton-Wilkes Barre (34.6%) grew. In the tertiary markets, all metro areas were stable. Washington, DC (43.4%) held the highest participation rate in 2005. Table 4 contains these data.

#### 4.17 Cultural Activity and History/Heritage Interest Activity by Geographic Markets

Interest in history and America's heritage in the New England market area mirrored the national trends; history and heritage interest activity grew at identical rates. The overall interest in the market area was higher for cultural activities (17.1% in 2005 compared to the national rate of 14.8 percent in 2005) even though the rates of change were the same. See Table 4 for these data.

#### 4.18 Cultural Activity Lifestyles

In the primary markets, seven of the nine markets remained stable for cultural activity interest. Interest was strongest in Boston (17.8%) and New York City (18.9%). Growth occurred in two metro markets in this region (Bangor and Portland/Auburn). Although Growth was also experienced in the secondary market area overall, the tertiary market interest for cultural activities remained stable. Philadelphia held the highest interest rate (16.5%) and Scranton-Wilkes Barre grew the least (11.8%) during the period. In the tertiary market, Washington, DC (19.3%) held the highest rate but experienced no growth, and the other metro areas were stable.

#### 4.19 History and Heritage Interest Lifestyles

In the primary market, eight of nine metro markets grew in their interest and involvement for history and heritage and one market area, Hartford/New Haven, actually experienced strong growth overall during the review period. The primary market overall held a household participation rate of 6.4 percent—slightly below the national rate of 6.8 percent in 2005. Both the secondary and tertiary regions experienced growth from 1995 to 2005. Each registered a household participation rate of 7.2 percent for interest in history and heritage. Both Harrisburg (8.2%) and Philadelphia (7.2%) were found to have strong growth trends. Washington, DC held the highest interest rate (8.0%) in history and heritage in the tertiary markets, but Pittsburgh experienced the strongest growth trend of the metro areas within this region.

#### 4.20 Impact of 9/11 on Travel and Recreation Trends

This data set provided one of the first review opportunities to examine the impact 9/11 had on travel and recreation trend activities over time. The measured impact of 9/11 on the travel and recreation data does not appear here until 2003. Travel activities, both domestic travel and vacation travel, peaked in 2000 or 2001. Domestic travel dropped from a national household participation rate of 42.5 percent in 2001 to 38.0 percent in 2003, and the national vacation travel rate dropped from a peak of 37.9 percent to 35.1 percent in 2003. The losses were not as dramatic as expected but were indeed more pronounced in the New England market area. The New England overall domestic travel rate dropped from a peak of 43.5 percent in 2000 to a 38.8 percent participation rate in 2003 while vacation travel dropped from a peak of 46.6 percent in 1999 to 31.2 percent in 2003. Further analysis, though, saw these rates rebound in 2004, when vacation travel for the New England region was 43.4 percent and held steady in 2005 at 42.1 percent. Domestic travel, on the other hand, did not rebound, but slowly declined to 38.0 percent in 2004 and continued down to 37.7 percent in 2005.

Only four of the 12 recreation activities and interests experienced losses in participation rates exceeding two percent at the national level in the post 9/11 era. Fitness walking dropped from a peak of 36.9 percent to 31.3

percent in 2003; attending cultural events dropped from 19.8 percent to 16.8 percent in 2003; camping and hiking dropped from 28.4 percent to 26.2 percent in 2003, and biking dropped from 24.2 percent to 21.7 percent in 2003. The losses in these same activities in the New England market area were slightly higher. Fitness walking dropped from a peak of 38.6 percent to 31.6 percent in 2003, attending cultural events dropped from 22.9 percent to 18.8 percent in 2003, camping and hiking dropped from 24.2 percent to 20.2 percent in 2003, and biking dropped from 24.3 percent to 21.0 percent in 2003 for each of these New England market area activities. Only the outdoor recreation activities (camping and hiking, hunting, fishing, and interest in wildlife and the environment) collectively rebounded in participation rates after 2003. The recreational activities of golf, tennis, skiing, and biking continued to slowly but steadily decline in household participation rates post 9/11. Consequently, the largest losses came in the travel activities, although some recreation activities were affected, not all were affected as negatively as the travel activities during this review period.

## 5.0 CONCLUSIONS AND IMPLICATIONS

Earlier studies indicated that the New England travel markets had rebounded in the mid-1990s and then grew into the late 1990s. The areas targeted by New England destinations, however, revealed further trends in the market post-2000. The SRDS *Lifestyle Market Analyst* provides an excellent source of secondary data about these markets. In this study, New England's markets were grouped and examined into primary, secondary, and tertiary areas. Findings from these markets provided additional insights into the markets and trends within them. The data are current and because yearly data are provided, trend analyses are both possible and timely.

Travel, and particularly vacation travel, in the New England Region revealed no growth over the entire period and growth primarily only in the early half of the decade. There was evidence that 9/11 impacted the data with large drops in vacation travel for the New England Region from its peak year to the first full measurement year after 9/11, 2003. However, rebound in participation was found to occur in 2004 and 2005. For recreation and sport markets, biking experienced a growth trend in

New England during the study period while tennis and skiing remained stable and golf declined. The primary market for skiing in the New England region experienced no growth overall; however, the rates were still above the national averages. For outdoor recreation, interest in the environment and wildlife had declined across all markets while interest in camping, hiking, and fishing grew. Furthermore, participation in these activities and individual metro markets varied widely. However, the activity interests in outdoor activities in the overall New England market analysis found each of these activities to lag behind national rates. The fitness markets were stable and interest in history and cultural activities continued to grow in interest overall.

We should note, however, that the information collected through the SRDS data does not indicate whether these markets either have traveled or actually will travel to New England. The link to activity participation and travel is only an association. There are no links in the data to actually show where the households traveled—only that they did take domestic or vacation travel trips in the last year. The associations would be expected to be strong. People who travel on vacation are likely to go on trips that are within a reasonable distance from home. Though it is likely that a portion of this travel was to New England, one cannot be conclusive on this assumption. These market figures reveal only the propensity to travel and engage in the activities monitored here. Furthermore, data in the SRDS only highlight the number of households and participation rates and do not address individual participation rates or the volume of participation or actual number of trips taken.

When these findings are combined with a look at the target markets regions—primary, secondary, and tertiary—we more fully understand where the markets may actually exist. We know that the vacation travel market was strong, was dramatically impacted by 9/11, but has rebounded within the two most recent years. We also now know that the primary markets of New England have the highest participation rates for this activity. Furthermore, we know that six of nine metro markets in the primary target region are taking vacation trips at rates higher than the national average even though their rates are not growing. Knowing that New England-

based travelers participate at levels well above national participation rates for selected sport and recreation activities is encouraging and helpful in the targeting process.

In other activities, it was clear that some markets are changing and great differences exist between major metro areas and smaller areas. For example, we found that interest in the environment and wildlife had slowed over the last half of the decade. On the other hand, other significant differences existed. For example, in hunting and fishing, household participation rates in Bangor, ME (the rate for hunting in the most recent year, 2005 was 31.6% and for fishing 40.2%) were more than twice the rates of the New York City metro area for the same activities (hunting rate - 7.7% and fishing rate - 18.2%). However, the number of hunting households in Bangor was 44,748 in 2005 while in the NYC metro area the number of hunting households was 578,708 in 2005. While rates are indeed important, overall market size cannot be overlooked and should be carefully understood and examined. But, it is clear that reaching the market in Bangor would be easier than in New York City. The market is simply more concentrated even though it is less than 13 times the size of the New York market.

Within recreation, travel, sport, and cultural activity markets, more insights were gained by examining the geographic markets where people live and participate. Finding markets that are active and markets that are growing in activity interest is critical to market successes. New England destination markets have been shown to be travelers who came from active households. This research tells where visitors are likely to come from and whether those same markets are growing, are stable, or are declining within these lifestyle pursuits. This review of New England destination travelers and their respective markets further enhances our understanding of the market potential of the area and opportunity to attract those travelers. We also see that the markets are changing. A simple review of national, regional, and metro trends and activity patterns can be misleading unless one examines carefully each of the individual markets. These markets are dynamic—some drastically different even within a region—and are ever changing. This monitoring of trends and activities by markets will continue to be

necessary if New England is to maintain its status as a major destination tourism region.

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