

THE NEW ENGLAND TRAVEL MARKET: CHANGES IN GENERATIONAL TRAVEL PATTERNS

Rodney B. Warnick

Associate Professor, Department of Hotel Restaurant and Travel
Administration, 107 Flint Lab, University of Massachusetts,
Amherst, MA 01003-2710

The purpose of this study was to examine and explore the New England domestic travel market trends, from 1979 through 1991 within the context of generations. The existing travel markets, who travel to New England, are changing by age cohorts and specifically within different generations. The New England changes in generational travel patterns do not reflect national trends. Implications and discussion points were provided.
Keywords: Domestic travel, trends, New England, demographics, generations, generational marketing, and market implications.

Introduction

Evidence indicates that demographic shifts in the population age structure will affect many businesses and activities, especially tourism as the population ages and significant portions of the population have time to travel (Research Alert 1990). This will be particularly true as baby boomers reach older age cohorts. The distinct differences in travel-specific behavior and participation rates exhibited by changes over time will likely shape future demand for these activities. Recent studies (Warnick 1992B and 1993B) indicated that domestic travel in the New England has become a mature market. Rather than simply examine tourism travel trends by age cohorts, this study examines the generations as they cycle through time and relates their domestic travel behavior to the New England Region.

Purpose of the Study

The purposes of this research paper are three-fold: 1) to examine domestic travel to New England during the 80s and early 90s within the context of generations; 2) to determine how participation rates in domestic travel within individual age categories changed over time (from 1979 through 1991)? (Can watershed years be identified in a 13 year span?); 3) to determine how participation rates in domestic travel of generations changed as these groups passed from one age category into the next (i.e., from 25 to 34 in 1980 to 35 to 44 in 1990)? Will generational characteristics and personalities impact upon domestic travel?

Method

For the analysis of domestic travel, data for this study were compiled from the annual surveys conducted by Simmons Market Research Bureau, Inc. (1979 through 1991)¹. This research firm annually measures participation rates, demographic composition and media use patterns of a wide variety of leisure, sport and travel activities. The sample sizes range from 15,000 adults sampled in the early 80s to over 21,000 adults sampled in 1990. The data were analyzed over the period from 1979 through 1991 using an average annual adjusted percentage change rate.

Other change rate factors were considered (weighted change rate, moving average, and least squares method); however, this method was selected due to its wide acceptance. Within this study only travelers who indicated that they traveled to New England were included. Excluded from this analysis were travelers who visited the New England from other countries.

The nature of domestic travel and participation requires the description of three major components of travel demand. First, domestic travel must be defined. "Domestic travel" is defined as "any trip(s) of over 100 miles (one way) within the continental 48 coterminous U.S. states taken in the previous 12-month period" (Simmons Market Research Bureau, Inc. 1991). This definition of domestic travel includes all types of travel taken which fits the mileage and regional description; but excludes all types of travel taken of distances shorter than 100 miles. Second, "market size" is the "number of people who participate in domestic travel." This statistic in and of itself it is somewhat less meaningful than a statistic which more specifically quantifies demand or travel volume. However, the nature of this data set does not easily allow a projection of the number of travel days to New England. Third, "participation rate" is the percent of total adults by descriptor (total U.S. population or age - such as 18- to 24 -year-olds) who elected to travel to New England for any reason as a primary destination during the previous 12 months. In this study the geographic region definition of "New England" includes the states of Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut.

Age cohorts in terms of the demographic patterns of travel include the following categories: 18 to 24; 25 to 34; 35 to 44; 45 to 54; 55 to 64 and 65 and older. Other groupings of age cohorts include young adults -- 18 to 34; middle aged adults -- 35 to 50; and mature adults -- 50 and older. The generations included were the GI Generation (born 1901 to 1924); the Silent Generation (born 1925 to 1942) the Baby Boom Generation (born 1941 to 1960); the Thirteenth Generation (born 1961 to 1981) and reference is made to the newest generation, the Millennial Generation (born since 1982). The Lost and Missionary Generations (both born before 1904) are referred to but are not a major portion of this study as they are now very few of these individuals who are active travelers. As generations move through time, they have been labeled and have been found to take recycle and within each generation a set of traits evolve or also cycle through time. Thus, as generations are added, they have been labeled "idealistic" like today's Baby Boomers, "reactive" like today's X Generation, "civic" like the older GI Generation or the youngest Millennial Generation, or adaptive like today's Silent Generation. Currently we are adding a civic generation as predicted by Strauss and Howe (1991) in the Millennial Generation. The cycle then is idealistic-reactive-civic-adaptive. Within each generation, such as the Baby Boom Generation, traits evolve over time. For example, Baby Boomers grew up being "indulged," then turned inward and became "narcissistic," and now are in a "moralistic" mode (note the move to "political correctness") and will eventually move into a "visionary" phase. These generations are based on the works of Strauss and Howe (1991). The cycle of generations and their specific generational traits have repeated over time since the 1500s and the authors expect these cycles to continue. Strauss and Howe's (1991) works defines these cycles through such concepts as social moments, secular crises, and social awakenings. For more details on the concepts of generations, generational cycles and generational traits, please see Strauss and Howe, 1991. The generations, their generation type name and their traits are listed below in Table 1.

¹/ Permission to use the travel data base was granted by Simmons Market Research Bureau (SMRB), Inc. of New York for the purposes of this study. The interpretation of the data is the author's and SMRB is the source.

Table 1. Generation names, examples and traits.

Type	Generation Example	Generational Traits ^a
Idealist	Baby Boom	Indulged Narcissistic <u>Moralistic</u> Visionary
Reactive	Thirteenth / X	Criticized <u>Alienated</u> Pragmatic Reclusive
Civic	GI, Millennial	<u>Protected</u> (Millennial) Heroic Powerful <u>Busy</u> (GI)
Adaptive	Silent	Suffocated Conformist Indecisive <u>Sensitive</u>

^aThe current trait of the generation is underlined for each generation. Source: Strauss and Howe, 1991.

Age cohorts were fitted to the generations to examine the domestic travel behavior specific to the New England Region. Target regions, or the place where travelers come from, are defined by Simmons (1991) in four broad areas of the U.S.: Northeast, South, Midwest and West.

The data were analyzed using an average annual growth rate which is defined as the percent change in terms of the size of the market or travel volume. It is derived by taking the current year number (market size or market volume) subtracting the previous year number and dividing by the previous year number; percent change from year to year was then averaged over the study period of 1979 through 1991. Travel market composition is defined as the percent of the market from each area -- such as from each region.

Selected Findings

Overall Market Conditions for 1979 through 1991

The participation rate of all adults selecting New England as a primary destination averaged 3.6% over the decade. An adjusted annual change rate indicated 4.6% decline per year for the U.S. adult market choosing New England as a primary destination. This translates into losing about 140,000 to 150,000 primary destination travelers per year to the region. The peak year during this period was 1984 when 6.9 million destination travelers selected New England as a primary destination. The bottom year was 1991 when 4.2 million destination travelers selected New England. Caution must be noted in the overall results as 1991 was the Gulf War year which had dramatic impacts on the winter related travel during this period of the war. This was particularly harmful for New England as it retains a significant amount of travel based on winter recreational sports (i.e., downhill skiing, cross country skiing, snowmobiling, etc.). (NOTE: For a more complete update of the domestic travel trends for New England by demographic and geographic markets, please see the Warnick, 1993. "The New England Travel Market: Changing Demographics and Geographic Markets, 1980 to 1990." 1993 *NERR Proceedings*, pp 205-215.) Those findings may be viewed as somewhat more stable as the Gulf War year was not included within those calculations. The region, as a primary destination, appears to have rebounded in 1992 (these data are not yet fully available, but preliminary reviews indicate the rebound). The overall statistics for this section may be found in Table 2.

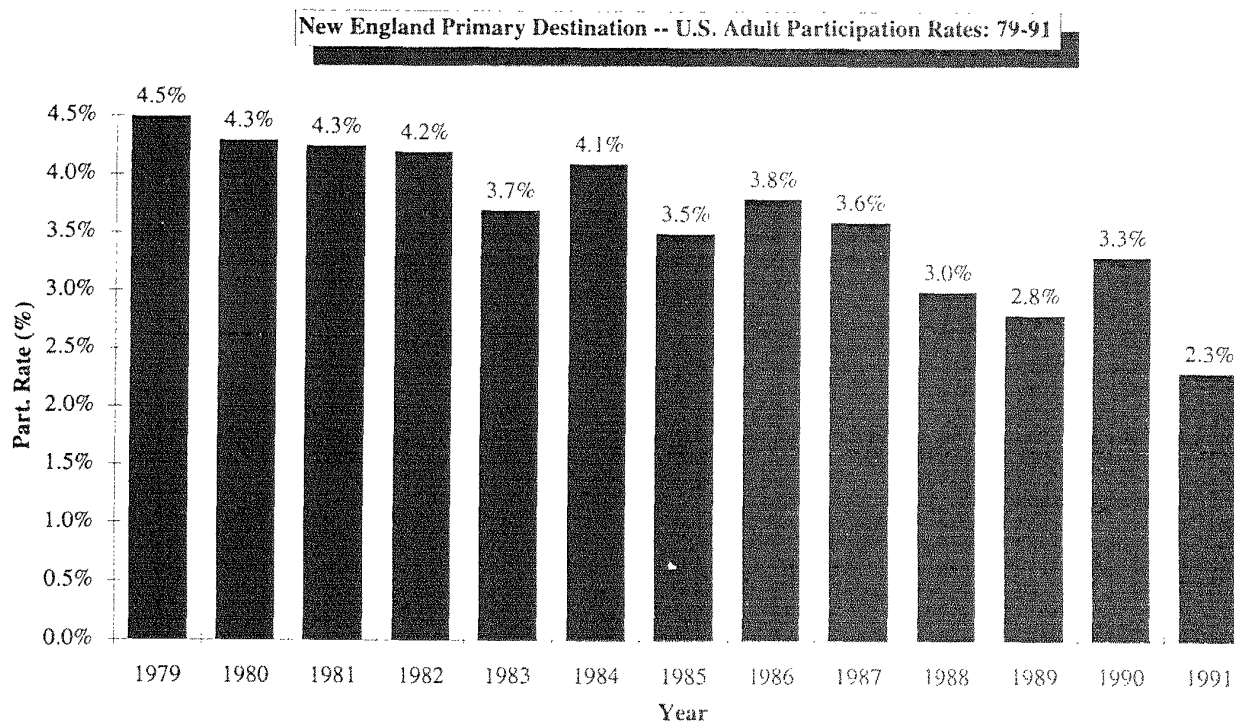


Figure 1. Adult participation rates for New England travel destination, 1979-1992.

Table 2. New England travel market.

Table 2. New England travel market.																		
Age Cohorts	Adult Part. Rate #New Eng. Trav. ('000)	New England Primary Destination Choice										Decade	Adj. Annual	Two-Point				
		1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	Average	Change Rate	Moving Ave.	
		4.5%	4.3%	4.3%	4.2%	3.7%	3.7%	3.6%	3.5%	3.8%	3.6%	3.0%	2.8%	3.3%	2.3%	3.6%	-4.6%	-3.9%
Adult Overall Rate 18 to 24	7,062	4.5%	4.3%	4.3%	4.2%	3.7%	3.7%	3.5%	3.8%	3.6%	3.0%	2.8%	3.3%	2.3%	3.6%	-4.6% <td>-3.9%</td>	-3.9%	
		4.6%	4.3%	4.3%	4.2%	3.9%	3.6%	3.0%	2.8%	2.7%	2.5%	1.8%	3.5%	1.9%	3.8%	-7.5% <td>-6.8%</td>	-6.8%	
		4.5%	4.7%	4.7%	3.5%	4.5%	4.0%	3.8%	4.4%	4.5%	2.6%	2.7%	3.5%	2.6%	4.3%	-3.3% <td>-4.7%</td>	-4.7%	
		5.4%	5.2%	5.4%	5.5%	3.6%	5.3%	4.3%	4.2%	3.6%	3.7%	3.1%	4.5%	2.6%	4.3%	-2.6% <td>-3.3%</td>	-3.3%	
		5.2%	5.1%	5.2%	5.3%	4.0%	5.0%	4.0%	3.9%	3.8%	3.9%	2.9%	3.9%	3.0%	4.2%	-2.9% <td>-3.4%</td>	-3.4%	
45 to 54	7,062	4.2%	3.5%	3.9%	4.2%	3.4%	4.7%	3.3%	4.6%	3.7%	3.7%	4.0%	2.5%	3.2%	3.7%	3.7%	0.9% <td>-2.4%</td>	-2.4%
		4.2%	3.5%	3.9%	4.2%	3.4%	4.7%	3.3%	4.6%	3.7%	3.7%	4.0%	2.5%	3.2%	3.7%	3.7%	0.9% <td>-2.4%</td>	-2.4%
		3.1%	2.3%	3.0%	3.7%	2.4%	2.7%	2.5%	3.0%	3.0%	2.1%	2.3%	2.6%	2.0%	2.6%	-1.0% <td>-0.7%</td>	-0.7%	
		3.1%	2.3%	3.0%	3.7%	2.4%	2.7%	2.5%	3.0%	3.0%	2.1%	2.3%	2.6%	2.0%	2.6%	-1.0% <td>-0.7%</td>	-0.7%	
		3.1%	2.3%	3.0%	3.7%	2.4%	2.7%	2.5%	3.0%	3.0%	2.1%	2.3%	2.6%	2.0%	2.6%	-1.0% <td>-0.7%</td>	-0.7%	
65 and Older																		
Other Age Cohorts																		
Adult Overall Rate 18 to 34	7,062	4.5%	4.3%	4.3%	4.2%	3.7%	3.7%	3.5%	3.8%	3.6%	3.0%	2.8%	3.3%	2.3%	3.6%	-4.6% <td>-3.9%</td>	-3.9%	
		4.6%	4.3%	4.3%	4.2%	3.9%	3.6%	3.5%	3.7%	3.8%	2.5%	2.4%	2.9%	1.8%	3.4%	-5.7% <td>-5.5%</td>	-5.5%	
		5.6%	5.3%	5.6%	5.9%	3.4%	4.3%	4.1%	4.3%	3.6%	3.8%	3.1%	4.4%	2.9%	4.3%	-2.1% <td>-3.2%</td>	-3.2%	
		3.8%	3.2%	3.6%	3.9%	3.3%	4.2%	3.2%	3.7%	3.4%	3.0%	2.9%	2.7%	2.5%	3.3%	-2.4% <td>-2.5%</td>	-2.5%	
		3.8%	3.2%	3.6%	3.9%	3.3%	4.2%	3.2%	3.7%	3.4%	3.0%	2.9%	2.7%	2.5%	3.3%	-2.4% <td>-2.5%</td>	-2.5%	
50 and Older																		
Target Region																		
Northeast	7,062	14.5%	14.3%	13.9%	13.4%	11.5%	13.1%	10.8%	11.5%	11.1%	8.8%	6.5%	10.2%	6.4%	11.0%	-4.1% <td>-4.5%</td>	-4.5%	
		1.7%	1.8%	1.9%	1.9%	1.2%	1.6%	1.4%	1.5%	1.4%	1.3%	1.8%	1.4%	1.1%	1.5%	-1.4% <td>-2.4%</td>	-2.4%	
		1.6%	1.3%	1.4%	1.5%	1.5%	1.7%	1.8%	2.1%	1.8%	1.7%	1.9%	1.7%	1.4%	1.7%	-0.4% <td>0.9%</td>	0.9%	
		1.6%	1.3%	1.3%	1.3%	1.9%	1.2%	1.0%	1.2%	1.5%	1.3%	1.4%	0.9%	1.1%	1.3%	0.0% <td>-2.2%</td>	-2.2%	
		1.6%	1.3%	1.3%	1.3%	1.9%	1.2%	1.0%	1.2%	1.5%	1.3%	1.4%	0.9%	1.1%	1.3%	0.0% <td>-2.2%</td>	-2.2%	
Midwest																		
West																		
Target Region Composition																		
Northeast	7,062	72.4%	72.9%	71.8%	70.7%	68.5%	70.5%	66.7%	65.6%	65.9%	61.5%	50.1%	66.3%	58.1%	65.7%	-1.3% <td>-1.3%</td>	-1.3%	
		9.6%	10.6%	11.3%	12.0%	8.4%	9.9%	10.1%	9.7%	9.4%	10.7%	15.7%	10.2%	10.2%	10.8%	3.4%	1.3%	
		11.0%	10.3%	11.0%	11.6%	13.6%	14.2%	17.6%	18.9%	16.8%	19.3%	24.2%	17.8%	20.6%	16.3%	6.4%	5.9%	
		7.0%	6.3%	6.0%	5.7%	9.5%	5.3%	5.6%	5.8%	7.9%	8.5%	10.0%	5.8%	9.5%	7.2%	7.9%	2.6%	
		7.0%	6.3%	6.0%	5.7%	9.5%	5.3%	5.6%	5.8%	7.9%	8.5%	10.0%	5.8%	9.5%	7.2%	7.9%	2.6%	
Total Travel Destinations of Northeast Market ('000)																		
Total All Known Destinations	7,062	138,238	130,431	131,425	132,419	129,781	126,112	119,659	121,750	125,319	122,738	122,913	130,839	130,494	126,990	-0.4% <td>-0.2%</td>	-0.2%	
		27,646	25,426	23,534	21,642	25,862	28,141	24,064	22,931	24,620	23,877	20,069	21,780	20,870	23,568	-1.8% <td>-1.7%</td>	-1.7%	
		5,112	4,965	4,877	4,788	4,335	4,860	3,975	4,318	4,151	3,276	2,460	3,913	2,489	4,034	-3.4% <td>-3.7%</td>	-3.7%	
		7,222	7,135	7,600	8,064	8,205	8,307	7,276	6,268	6,632	6,978	6,094	5,772	4,853	6,932	-2.9% <td>-2.5%</td>	-2.5%	
		15,312	13,326	11,058	8,790	13,322	14,974	12,813	12,345	13,837	13,623	11,515	12,095	13,528	12,602	0.6% <td>-0.2%</td>	-0.2%	
NE Share of All																		
NE Share of NoEa	7,062	3.7%	3.8%	3.7%	3.6%	3.3%	3.9%	3.3%	3.5%	3.3%	2.7%	2.0%	3.0%	1.9%	3.2%	-3.3% <td>-3.5%</td>	-3.5%	
		18.5%	19.5%	20.7%	22.1%	16.8%	17.3%	16.5%	18.8%	16.9%	13.7%	12.3%	18.0%	11.9%	17.0%	-1.7% <td>-1.7%</td>	-1.7%	
		26.1%	28.1%	32.3%	37.3%	31.7%	29.5%	30.2%	27.3%	26.9%	29.2%	30.4%	26.5%	23.3%	29.4%	-0.4% <td>-0.4%</td>	-0.4%	
		26.1%	28.1%	32.3%	37.3%	31.7%	29.5%	30.2%	27.3%	26.9%	29.2%	30.4%	26.5%	23.3%	29.4%	-0.4% <td>-0.4%</td>	-0.4%	
		26.1%	28.1%	32.3%	37.3%	31.7%	29.5%	30.2%	27.3%	26.9%	29.2%	30.4%	26.5%	23.3%	29.4%	-0.4% <td>-0.4%</td>	-0.4%	
Mid-At Share of NoEa																		

New England Primary Destination -- U.S. Adult Travelers: 79-91

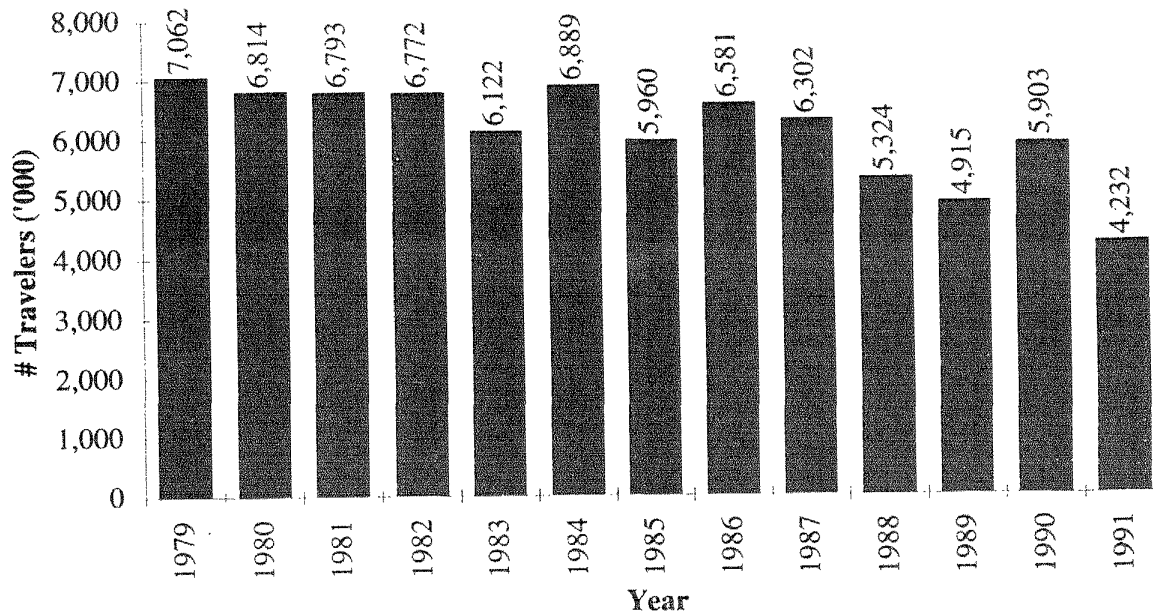


Figure 2. New England destination travelers, 1979-1991.

New England's Demographic Markets

Are the travelers to New England young or old and are there are prevalent trends noted here? These findings update the author's 1993 study by adding data from 1979 and 1991. New England declined as a destination choice for five of the six age cohorts:

- 18 to 24 year olds -- declined by 7.5%
- 25 to 34 year olds -- declined by 3.3%
- 35 to 44 year olds -- declined by 2.6%
- 45 to 54 year olds -- declined by 2.9%
- 65 and older -- declined by 1.0%

However, New England grew as a destination choice for one of the six age cohorts:

- 55 to 64 year olds -- increased by ".9"%"

These data suggest that the New England destination market has continued to decline. There is some indication that age cohorts changes are more drastic and provides some speculation as to whether specific generations have indeed contributed to the overall decline in travel participation.

New England's Generational Market Trends

A different view of travel to New England may be gained when generations are examined over time. Is the market changing? Is New England's base market becoming older, is the region still attracting their fair share of younger adults?

There appear to be watershed years evident in these data even though there has been an overall decline in domestic travel to New England in the years examined here. Participation rates for five of the six age cohorts ticked up after 1989. This happens to

be the very point when each generation is neatly confined within the corresponding 10 year age segments. For example, in 1989 all of the Baby Boomers had moved up one age cohort from "18 to 24" to "25 to 34" and "25 to 34" to "35 to 44." This change, which appears to indicate a change in the overall decline trend could then be called a "watershed year" -- a point in time when the overall pattern changes. Even within these overall changes, there may be age specific changes which may provide more insights into the changes in travel patterns to New England. See Figure 3 (next page) for changes in travel pattern participation trends by age cohorts.

The overall rate of decline appears much more pronounced in age categories under 35; the rates of decline were more than double of their older counterparts (see "Other Age Cohort" configurations in Table 2 here). Specifically, rates declined at a rate of nearly 7% per year for 18 to 24 year olds and over 3% for 25 to 34 year olds. Rates of age groups over 35 also declined, but they declined at a slower rate of approximately 3% percent per year or less. The age category where domestic travel declined the least was the 55 to 64 and older category. However, the overall problem still remains. One is looking at static age cohorts; but, we need to look at generations as they move through time.

Some findings affecting the data provide insights into how the data are affected by the aging population and the movement of generations through particular age cohorts. For example, a look at the younger generations provides some insights into how people change their travel behavior over time. In 1979, Baby Boomers were 35 or under. By 1989, a watershed year, Baby Boomers were in the 25 - 34 and 35 - 44 year old categories. Within the 18 to 24-year-old category, for example, domestic travel

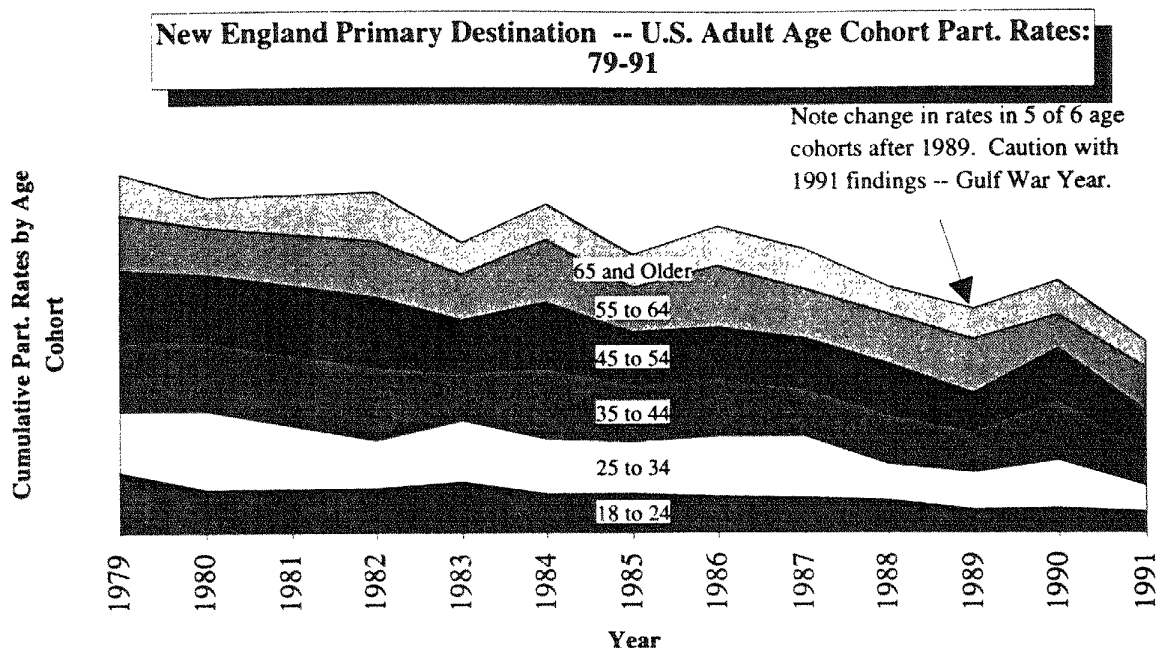


Figure 3. New England primary destination, U.S. adult participation rates by age cohort, 1979-1991.

participation rates declined steadily from '79 through '91. From '89 to '91, rates increased by 5% for 18 -24 year olds at the national level, but, there has been no corresponding change in participation rates among these young adults traveling to New England. The "Baby Bust" or "13th Generation" fully comprised the 18 - 24 year old cohort after the year 1989.

The "Silent Generation" adults were largely in the 35 to 54 age categories from 1979 through 1989; then moved ahead into 45 to 64 year old groups. Their domestic travel behavior participation rate declined from 1979 - 1989 in the 35 to 44 age category. In 1979, the New England travel participation rate was 5.4% and it declined to 3.1% in 1989. It appears to have rebounded in 1990 at 4.5%. The older half of the "Silent Generation," age 45 to 54, experienced a decline in New England travel participation from 5.2% in 1979 to a low of 2.9% in 1989. It, too, has appeared to have rebounded to 3.9% in 1990. However, this was the only age cohort to experience an increase in participation rates for New England.

Next, the "G.I. Generation" held the most stable New England travel participation rate over the decade when they were age 55 to 64. Their participation rates in 1979 was 4.2% and dropped to its lowest rate of 2.5% in 1990, but generally held between 3.3% and 4.7%. The "G.I. Generation" moved out of the 55 to 64 age group and completely into the 65 and older age category by 1989. The upward trend in growing domestic travel in this age category was largely fueled by the "G.I. Generation" moving into retirement years.

The year 1989 was a watershed year. This is a positive note for the domestic travel industry in New England. Participation rates

appear to have rebounded after the 1989 year; however the Gulf War in 1991 has clouded the picture. Caution must be observed because participation rates only indicate what percent the overall population and individual members of age categories participate and not how frequently they travel. New England's dominant demographic market are the 35 to 50 year olds, who have the highest participation rates and specifically the Baby Boomers (age 35 to 44).

The Transition of Generational Participation Rates in Domestic Travel

In this portion of the study, generations were examined during the transition from one decade to the next. The overall participation change by generation from one decade to the next was examined within the context of three periods (1979 to 1989; 1980 to 1990 and 1981 to 1991). National domestic travel participation of declined on average of 9% for these three year groupings (Warnick 1993A); however, travel to New England overall, was only off 1.6% on average over these three time periods.

The Baby Boom Generation's participation rate in New England destination travel declined at the same or a lower rate. This is a positive sign. The younger half of the Baby Boom Generation (those age 25 to 34 in the 90s), had participation rates which declined less than any other age cohort. This segment of the Baby Boom Generation has a participation rate which decline -1.1% on average for these three periods. In fact, from 1980 to 1990, their travel participation behavior actually increased slightly. The older half of the Baby Boom Generation, those age 35 to 44 in the 90s, had a decrease in participation rates as they aged, but it was not higher than the overall population participation rate change for the same period. The "Silent Generation" which appears to be a

growth market nationally is not as strong in its travel intentions to New England. The younger half of this generation, those age 45 to 54 in the 90s, had the highest decline in New England destination based travel of all of the generations. Because the GI Generation has entered into the 65 and older cohort, not as much

can be read into the changes in the their travel patterns. However their participation rate change was equal to the overall population change for the region and is much lower than the change at the national level. See Tables 3 and 4 for changes in participation rates by generations over the decades.

Table 3. Generational changes in New England domestic travel participation rates: 1979, 1980 to 1990 and 1981 to 1991.

Generation, Age Category and Year	1979	1989	Change	1980	1990	Change	1981	1991	Change	Average Decade Change Rate
<i>Baby Boom Generation</i>										
18 to 24 year olds (79,80,81)	4.6%			3.3%			3.4%			
1->25 to 34 year olds (89,90,91)		2.7%	-1.9%		3.5%	0.2%		1.9%	-1.5%	-1.1%
25 to 34 year olds (79,80,81)	4.5%			5.8%			4.7%			
1->35 to 44 year olds (89,90,91)		3.1%	-1.4%		4.5%	-1.3%		2.6%	-2.1%	-1.6%
<i>Silent Generation</i>										
35 to 44 year olds (79,80,81)	5.4%			5.2%			5.4%			
1->45 to 54 year olds (89,90,91)		2.9%	-2.5%		3.9%	-1.3%		3.0%	-2.4%	-2.1%
45 to 54 year olds (79,80,81)	5.2%			5.1%			5.2%			
1->55 to 64 year olds (89,90,91)		4.0%	-1.2%		2.5%	-2.6%		3.2%	-2.0%	-1.9%
<i>G.I. Generation *</i>										
55 to 64 year olds (79,80,81)	4.2%			3.5%			3.9%			
1->65 and over (89,90,91)		2.3%	-1.9%		2.6%	-0.9%		2.0%	-1.9%	-1.6%
<i>Overall Population Travel Rate</i>										
Early Rate	4.5%			4.3%			4.3%			
1-> One Decade Later Rate		2.8%	-1.7%		3.3%	-1.0%		2.3%	-2.0%	-1.6%

* The generation change of the GI Generation is report for consistency only; this generation's domestic travel participation rates are confounded by the presence of two other older generations (those 85+).

Source: Simmons Market Research Bureau. 1979-1991. Study of Media and Markets, Vol. P-4. Travel.

Table 4. Generational diagonal in domestic travel behavior in New England.

Year----->>> Life Stage and Age Cohort	-----The Early 80s-----			-----The Early 90s-----		
	1979	1980	1981	1982	1990	1991
<i>Elder</i>						
65 and Older	Lost/GI	Lost/GI	Lost/GI	GI	GI	GI
Travel Part. Rate	3.1%	2.3%	3.0%	2.3%	2.6%	2.0%
<i>Midlife</i>						
55 to 64	GI	GI	GI	Silent	Silent	Silent
Travel Part. Rate	4.2%	3.5%	3.9%	4.0%	2.5%	3.2%
45 to 54	Silent	Silent	Silent	Silent	Silent	Silent
Travel Part. Rate	5.2%	5.2%	5.2%	2.9%	3.9%	3.0%
<i>Rising Adult</i>						
35 to 44	Silent	Silent	Silent	Boom	Boom	Boom
Travel Part. Rate	5.4%	5.2%	5.4%	3.1%	4.5%	2.6%
25 to 34	Boom	Boom	Boom	Boom	Boom	Boom
Travel Part. Rate	4.5%	5.8%	4.7%	2.7%	3.5%	1.9%
<i>Youth</i>						
18 to 24	Boom	Boom	Boom	Thirteenth	Thirteenth	Thirteenth
Travel Part. Rate	4.6%	3.3%	3.4%	1.8%	1.9%	1.6%

Source: Simmons Market Research Bureau. (1979, 1980, 1981 and 1989, 1990, 1991). Study of Media and Markets, Vol. P-4, Travel. Strauss and Howe. 1991. History of America's Future, 1584 to 2069. New York, NY: William Morrow.

Conclusions and Implications for Recreation and Tourism Resource Managers

Trends were evident in the New England Travel Destination Market from 1979 through 1991. New England has become even more mature as destination market over the last decade since the last year's review (Warnick 1993B). The travel market is not in a high growth mode and the findings here appear to be affected by the Gulf War of 1991. The actual adult participation rate has declined and the actual number of travelers is down slightly. Although New England is without a doubt one of the United States' most definable or marketable travel destination regions, the decline can be partially attributed to changing demographics and travel preferences of different generations.

However, this review of travel by different generations indicates some new insights and raises even more questions.

- Why is New England not gaining in popularity with the current young adults (those 18 to 24 years old)?
- Why is the Silent Generation not a growth market for New England as it is at the national level?
- The Baby Boomers appear to still be a potentially strong future market. Will they come?
- Can these data be used in predicting the future of travel to New England?

Trend analysis on an on-going basis is necessary. An analysis of these data for the period 1979 through 1991 indicated continued concern over an overall declining market for domestic travel in New England. However, the Gulf War and its impact on the 1991 data provides little comfort that the travel market has not yet fully rebounded. The addition of two more years of data indicated that the overall market declined up to 1989, then recovered in 1990 and then declined again in 1991. Was this a reflection of real market conditions or a spike in the data for 1990? Probably, it is a combination of both conditions. Furthermore, an examination of only year to year change can be misleading. For example, the Gulf War did influence travel to most all regions in the U.S. in 1991 and it appears to also had substantial impacts on the New England Region. The changes must be viewed in an overall pattern change.

Market change over time is another important travel trend issue which was examined here. People who participate in travel pursuits may change their rates of travel based on their individual household conditions. It is very possible that people who travel frequently one year might not travel as frequently the following year. Travel related behavior, like recreational related behavior, may reveal changing patterns over the life span or through age cohorts or even changes in attitudes about travel as one ages.

This study revealed further changes in the overall market traveling to New England. First, New England appears to be falling out of favor with young adults. This was most evident in the 18 to 24 year old segment where the rates declined by over 7% per year. This decline was even more dramatic than the 1993 findings indicated (Warnick 1993B). The 25 to 34 year market also declined in participation of traveling to New England by over 3% per year. Both the 35 to 44 and 45 to 54 year old markets declined by nearly 3% per year. The 55 to 64 year old segments increased only slightly and the 65 and over segment declined by about 1%. Finally, another view of the data revealed that the dominant age group for travel to New England are 35 to 44 year olds. This age cohort is comprised largely of Baby Boomers in the 90s.

These trends, if they continue may mean some very basic changes in how travelers use the resources in New England. If we assume that the region is losing the more active travelers (younger age cohorts usually have higher participation rates in active recreational pursuits than older cohorts); then activities which are likely to grow may include hiking, walking, visiting historic

places and more passive forms of recreation and entertainment. Activity resource areas which are likely to see declines in participation may include swimming, skiing, and outdoor resource based activities -- such as hunting, snowmobiling, water skiing, for example. These fundamental uses may not be dramatic changes, but will gradually change. Furthermore, unlike the national market where the Silent Generation, those 45 to 64, is seen as a strong growth travel market in the years ahead, this market is not growing in its choices of New England as a destination. At the national level, the younger half of the Silent Generation is the dominant market; however, this generation's travel participation behavior has declined the most in New England. Even though New England is losing its share of younger travelers, it does appear to be particularly at least stable for the older half of the Silent Generation -- those 55 to 64 years old. The Baby Boom Generation appears to be one of the potential growth markets for New England for the next decade.

New England is not the "hot market" it was a decade ago for domestic travel. Other regions appear to have marketed their regions more aggressively and successfully. More of the Northeast travel market, New England's primary source of travelers, have revealed more travel tendencies to other parts of the United States over the decade (Warnick 1993B). The aggressive nature of other regions, the revitalization of market areas, and the overall changing demographic and generational travel pattern changes may explain the repositioning of the New England Region. Furthermore, it may be that New England is now one of many choices and is losing market share based on a growing diversification in the travel market. Furthermore, business travel has slowed with the downturn in the New England industrial and manufacturing economy.

What are the choices for the tourism and travel industry and businesses within the New England? First, it must be noted that there is not high growth in the domestic travel market as defined within the context of this study. It continues to be a mature and declining market. It may be out hustled and repositioned by other more aggressive and perhaps potentially more attractive destination choices. Long term, there are signs that market conditions may improve. More retirees and an aging population with more free time should help to increase domestic travel demand to this region. Short term, the growing family market is particularly promising. New England is positioned near areas with large numbers of Baby Boomers with children. Agencies' positioning statements and plans and market place promotions should consider the family market. It is a viable market and will be aggressively pursued over the next decade. The rate of decline was smallest for the younger half of the Baby Boomer market which is just entering its rising adulthood years with children entering the nest. The market is likely to be strong for the next decade. The aging population and the increase of older markets is particularly promising for the New England. While the Silent Generation does not look as strong for New England as the trend does at the national level, the GI market may provide some promise for the very short term. This market declined the least after the Baby Boom Generation. New England's noteworthy historical, education and medical centers all may combine to attract more of these travelers to the region.

The longer stay behavior patterns of the family and older age markets does traditionally match well with the typical New England vacation. Those agencies which depend on a younger market (i.e., young adults 18 to 30 for example) must carefully review the future market potential and understand that this market's behavior is different than that of the older adults. This group of young adults belongs to the "Thirteenth or X Generation" and it is very different in its travel behavior than was the older Baby Boom Generation. The personality type of this generation is evolving from one of alienation into pragmatism. While they like to travel, destination choices must offer high quality and exciting experiences at relatively low cost. This group will become pragmatic much more quickly than their older counterparts, the "idealistic" Baby Boomers. Value is key to the X Generation due to income constraints. It is likely that this

market will be one of shorter stays, but perhaps more frequent trips. They view recreation, leisure and travel as a right, not a privilege. The message to them should reflect their culture of being blunt, flashy, kinetic, "MTVish", pragmatic and survivalistic (Warnick 1993A and Strauss and Howe 1991). One may learn how responsive this market is by watching the clues of how the market is targeted in the advertising world over the next decade.

With no strong growth patterns in the domestic market, recreation and tourism businesses must seek to balance market demand through either new markets or return markets. Furthermore, businesses must recognize that travel just does not "happen" anymore. Today's travelers have a diverse menu of national and international travel destinations to choose from during their free time. Heavily discounted airfares may prompt some travelers to go to more distant locales. Baby Boomers are a market who change their loyalties quickly. A decade ago they were called "Yuppies" and were buying big ticket items (BMW's, condos on the beach, wine coolers, etc.). They indulge in the fast lane of life. Today, this same generation is moving into family life, trying to juggle the same pace for life, but beginning to slow down. The items which they purchase may still be expensive, but they are indeed different (mini-vans; Legos™; fruit juices, etc.). They are rapidly moving to healthier lifestyles. They have realigned their life perspectives and are "downshifting" in order to simplify their hectic schedules. These cultural, generational and lifestyle changes will impact on their vacation desires, too. Once fast paced, exciting vacations were the draw for them. Today, stress reduction, healthy-orientation, and family experiences may be the draw. Time changes markets and markets change in their desires.

Tourism and recreation businesses can no longer expect to benefit from growth markets where a new customer base is constantly replaced with another customer base. Mature market conditions spur customer retention strategies and market share competitiveness. In other words, these businesses must work hard to retain their current patrons because other firms will be seeking to draw them away. It simply will be a more competitive tourism marketplace in New England in the 90s.

This review of domestic travel within the generational context of travelers to the New England destination area provides new insights and how the market conditions for the 1990s may be evolving. National trends can be misleading within a regional context. The changes in the national travel market were not duplicated in the New England travel market. However, closer and more intense monitoring of travel trends, both domestic and localized, is still needed. Much is still not known about the inner travel patterns within New England or about the travel volume of each of these segments examined here. But, travel patterns have evolved and the New England travel market is much different than it was just one decade ago.

Literature Cited

Simmons Market Research Bureau, Inc. 1979-1991. Study of Media and Markets, Volume P-4: Travel. New York, NY.

Simmons Market Research Bureau, Inc. 1991. Technical Guide. New York, NY.

Strauss, William and Neil Howe. 1991. Generations: The History of America's Future, 1584 to 2069. New York, NY: William Morrow and Company. 538pp.

U.S. Travel Data Center. 1991. Travel Outlook. Washington, D.C.: U.S. Department of Commerce.

Warnick, Rodney B. 1993B. The New England travel market: changing demographics and geographic markets 1980 to 1990. Proceedings of the 1992 Northeastern Recreation Research Symposium. General Technical Report NE-185. Radnor, PA: Northeastern Forest Experiment Station. pp. 208-215.

Warnick, Rodney B. 1992A. U.S. domestic travel, 1980 to 1989: hidden data and trends. National Recreation and Parks Association Leisure Research Symposium. October 1992. Cincinnati, Ohio.

Warnick, Rodney B. 1992B. Northeast domestic travel trends: An exploratory study and analysis, 1986 to 1990. New England Travel and Tourism Journal. 2: 7-14.

Warnick, Rodney B. 1993A. U.S. domestic travel: Back to the future -- the impact of an aging U.S. population on domestic travel trends. The Annual Review of Travel. New York, NY: American Express Travel Related Services. pp. 73-90.