

TRAVEL TRENDS IN NEW ENGLAND AND THE NORTHEAST UNITED STATES: UPDATING POST 9-11 TRENDS

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Abstract.—This paper examines the travel market trends in New England after September 11, 2001 (9-11). Comparisons of travel to New England are also made with overall national domestic travel trends and vacation travel trends. The primary purpose is to examine the markets that travel to both the Northeast United States and New England¹ regions to determine if and when the markets had rebounded since 9-11. Subregions of New England are also examined.

1.0 BACKGROUND AND INTRODUCTION

The overall purpose of this paper is to re-examine and update trends in travel and tourism activity markets by those who seek to travel to the Northeast United States and New England and, specifically, to look at these trends beyond the year 2001, or post September 11, 2001 when the U.S. was attacked by terrorists using civil planes to hit U.S. targets (World Trade Center and the Pentagon; hereafter referred to as 9-11). The primary purpose is to examine travel patterns of the various market segments that traveled to these regions from 2001 through 2005/2006 to determine if and when the markets have rebounded since 9-11.

Comparisons of travel to New England are also made with overall national domestic travel trends and

¹New England includes six U.S. states: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont. The Northeast region of the U.S. is the New England states plus New Jersey, New York, and Pennsylvania.

vacation travel trends. Selected travel variables and recreational/sport activities associated with travel are examined across destination subregions within New England – Northern New England and Southern New England – to determine if travel to these subregions is similar or not, and how the markets have changed.

2.0 REVIEW OF LITERATURE

In previous studies (Kelly and Warnick, 1999; Warnick, 2002, 2004, 2006), the major data sets employed to examine trends over time were either Simmons Market Research Bureau's *Study of Media and Markets* or Standard Rate and Data Service's (SRDS) *Lifestyle Market Analyst*. Each data set had its limitations. The Simmons data sets often were not current and data were difficult to extract although the data has become available in CD format in recent years and does allow queries and data analysis customization. The SRDS data was available in tabular form and did not allow one to break down the data beyond the presentation tables but was perhaps the most current and was available on a yearly basis by major metro areas or designated market areas (DMAs) (SRDS, 1995-2007).

Other similar data sets exist and are now available online via research university libraries and through subscription services for further analysis. One such data set is MediaMark's *TopLine Research Reports*. Their data are now available through 2005/2006, are similar in format to the Simmons data, and provide information on market size, participation rates, market profile, DMA rankings and market indices. However, *TopLine Research Reports* does not allow extensive opportunities to conduct data queries as does Simmons.

The line of research and trend analysis presented in this paper is based on the data in MediaMark's *TopLine Research Reports (TRR, 2001 - 2006)*. The TRR data are collected consistently the same way each

year and provide an excellent foundation for long-term trend analysis much as the Simmons and SRDS data sets have in the past. These data provide activity patterns within regional markets that represent New England and the Northeast U.S. destinations' travel patterns and behavior.

There was evidence in previous data sets that 9-11 impacted travel in the Northeast U.S. and New England. However, because these data sets lagged in time, the long-term trend events were not readily available. The measured impact of 9-11 on the travel and related recreational activity behavior did appear in these data when the first few years post 9-11 became available. The previous analysis (Warnick, 2006) of the data and research did report a decline in travel to the New England primary target market region. Those previous data are discussed here briefly to provide a baseline or benchmark for examining travel trends over time.

Travel activities in the United States, both domestic travel and vacation travel appeared to have peaked in 2000 or 2001 according to previous studies (Warnick, 2003, 2005). Although declines in travel to these destinations were not as dramatic as expected post 9-11, the losses were indeed found to be much more pronounced in the New England and selected Northeast regional market areas, such as the New York metro area and within the primary market DMAs of the New England travel market. The overall New England domestic travel rate dropped from a peak of 43.5 percent in 2000 to 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 using the SRDS data from the *Lifestyle Market Analyst*. Further analysis from those data sets indicated that these rates rebounded in 2004 and 2005. There was also some evidence that participation in selected recreational activities was affected less in overall decline rates than the travel variables. However, a limitation of the SRDS data on recreational activities is that these activities are not linked to travel behavior and are linked only to the resident DMA's market behavior. It was concluded that people continued to participate in recreational activities, perhaps locally, and that their

activity patterns or behavior rebounded more quickly than travel behavior.

3.0 METHODS

This is a descriptive study of the activity and participation rates for travel and related activities from 2001 through 2006. Trend analysis was conducted by examining the change rates from year to year and calculating an average annual change rate during the specific time period (where data are available). The average annual change rate examines the percent change from each year to the next throughout the period and then averages the change rate over the total period. This eliminates the decade-to-decade change comparisons, which are often large. Comparisons are also insightful when these change rates within a region are compared with a larger or national change rate. For example, change rates in overall population change can be used as a benchmark for measuring change in travel participant numbers. Changes in numbers of participants were compared to overall adult population size growth to determine if the travel growth was changing at a rate comparable to these base rates. This benchmark for population growth was an average rate of 1.5 percent. Visual analysis of the data was used to determine the directional patterns of change. For the purposes of this study, several statistical variables were used to describe the trends evident in these data.

Number of travelers and participation rates of the adult population were used as the primary variables to examine the overall trends. Domestic travel and travel for vacation purposes and travel by primary regional destination including New England and the Northeast as a region were examined. Where the data were reliable (i.e., number of subjects sufficient for reliable statistical analysis), further analysis of the state travel trends was conducted by selected destination area (subregions), in this case Northern New England (Maine, New Hampshire and Vermont) versus Southern New England (Connecticut, Rhode Island and Massachusetts). Data were available in the *TRR* from 2001 through 2005/2006. The data for 2006 were available on the national level but were not yet available at the regional level. Additional lifestyle variables were examined to determine if people who

travel also might participate in recreational/leisure activities (general sightseeing, visiting family and friends or engaging in selected outdoor recreational or sport activities). However these statistics were available only at the national level and not for the Northeast or New England or its subregions (Northern and Southern New England).

4.0 RESULTS

4.1. National versus Regional Travel Trends Post 9-11

The *TRR* data indicate that the number of travelers has remained relatively constant between 2001 and 2006 (Table 1). However, the 0.7 percent growth rate in the number of domestic travelers is lower than the overall population growth rate in the same period (1.5 percent). This has resulted in a slight decline in the domestic travel participation rate during this period. In 2001, 55.2 percent of the adult population engaged in domestic travel and by 2006 the rate had dropped to 53.2 percent. Analysis of the year-to-year participation rates indicates that the rates remained relatively constant from 2001 through 2003 at approximately 55 percent of the total households participating before dropping off in 2004 and then gradually declining through 2006. Table 1 contains these data.

4.2. Travel Trends by Primary Travel Purpose

Among the primary travel purposes, the largest proportion of people reported traveling for vacation; more than 35 percent of the adult population traveled for vacation in 2005 (Table 2). This figure is close to the SRDS data from that period (Warnick, 2006). However, the average annual rate of vacation travel declined by a rate of 1.3 percent per year between 2001 and 2006. Only honeymoon travel and personal travel grew between 2001 and 2006 and these types of travel comprise only a small portion of all domestic travel.

4.3. Regional Travel Destination Trends: Where are the travelers going?

Of all regions of the country, the Northeast United States had the lowest proportion of domestic travelers between 2001 and 2006 ranging from 13 percent in 2001 to 11.8 percent in 2006 with an average annual decline of 1.9 percent (Table 3). During this time, the South Region of the country was the primary destination for most domestic travelers from U.S. markets with 29.1 percent and 27.5 percent of U.S. adults traveling to the South in 2001 and 2006, respectively, but with an average decline of 1.1 percent

Table 1.—U.S. population domestic travel: 2001 through 2006

Travel Category	Years						Average Annual Change Rate
	2001	2002	2003	2004	2005	2006	
Total adults ('000)	202,753	204,964	209,657	213,454	215,800	218,289	1.5%
Total adults who traveled	111,920	112,730	115,521	114,838	115,453	116,087	0.7%
Domestic travel part. rate	55.2%	55.0%	55.1%	53.8%	53.5%	53.2%	−0.7%

Note: Average annual change rate is measured by percentage change from year-to-year and averaged over period.

Table 2.—Participation rates of U.S. domestic travel markets by primary purpose: 2001 through 2006

Primary Travel Purpose	Years						Average Annual Change Rate
	2001	2002	2003	2004	2005	2006	
Business (company-paid)	7.5%	7.0%	6.7%	5.9%	6.4%	6.3%	−3.2%
Business (self-paid)	1.9%	2.0%	1.8%	1.8%	1.8%	1.7%	−2.1%
Honeymoon	0.7%	0.6%	0.7%	0.7%	0.7%	0.8%	3.3%
Vacation	37.3%	36.3%	37.7%	36.3%	35.1%	34.8%	−1.3%
Personal (not vacation)	16.0%	16.1%	15.7%	15.3%	15.5%	16.6%	0.8%
Part business/vacation	2.8%	2.7%	2.6%	2.6%	2.7%	2.3%	−3.6%

per year during that period. The North Central Region had the greatest average annual percent decline (–2.2 percent per year) between 2001 and 2006

The *number* of travelers who selected one of the six New England states as a primary destination declined only slightly from 13.17 million in 2001 to 13.05 million in 2005 (data were not available for 2006); the participation rate of domestic travel to New England declined from 6.5 percent to 6.0 percent during this time period. These changes do not indicate a significant overall directional change or rebound after 9-11. However, there was a small *increase* in travel to New England during the years immediately after 9-11 but the numbers and rates declined beginning in 2004.

4.4. Travel Volume Trends

While the overall numbers and participation rates reveal a decrease in domestic travel between 2001 and 2006, an analysis of travel frequency may be more revealing (Table 4). Travel by those who took three or more trips per year declined slightly between 2001 and 2006, from 22.5 percent to 20.5 percent. The only “travel volume” category (number of trips per year)

that increased during that time involved people who took only one trip per year. Data were not available by subregion for volume of travel. *TRR* does provide information that links recreational and leisure activities to travel activity, especially vacation travel.

4.5. Trends in Travel to New England

The overall participation rate of travelers to New England held relatively constant from 2001 to 2005 (Table 5). Within New England, the northern subregion (Maine, New Hampshire and Vermont) has been slightly more popular than the southern subregion (Massachusetts, Rhode Island and Connecticut) in 4 of the 5 years (2003 is the exception). Likewise, the percentage of travelers from the Northeast U.S. Region who selected Northern New England destination states over Southern New England states has also been consistently higher.

4.6. Travel Activity Pattern Trends

Selected tourism and recreational activities engaged in by travelers while on vacation were also analyzed (Table 6); data on these specific activities were available only at the national level, not at the regional

Table 3.—Primary regional destinations of U.S. domestic travel markets: 2001 to 2006

Part. Rate by Region	Years						Average Annual Change Rate
	2001	2002	2003	2004	2005	2006	
Northeast	13.0%	12.8%	12.6%	11.8%	12.0%	11.8%	–1.9%
North Central	15.4%	14.6%	14.3%	14.1%	12.9%	13.7%	–2.2%
South	29.1%	29.9%	29.3%	28.1%	28.1%	27.5%	–1.1%
West	18.8%	17.6%	18.6%	18.7%	18.4%	18.0%	–0.8%

Travel Variable	Years						Average Annual Change Rate
	2001	2002	2003	2004	2005	2006*	
Travel to New England	13,170	13,699	13,346	12,256	13,052		–0.1%
Trav. part. rate New Eng.	6.5%	6.7%	6.4%	5.7%	6.0%		–1.6%

*Data were not available for 2006 at the subregion level.

Table 4.—Number of trips taken by U.S. domestic travelers: 2001 to 2006

Number of Trips	Years						Average Annual Change Rate
	2001	2002	2003	2004	2005	2006	
One	19.3%	19.1%	19.1%	19.4%	19.8%	19.5%	0.2%
Two	13.4%	12.9%	13.7%	12.9%	13.1%	13.2%	–0.2%
Three or More	22.5%	22.9%	22.4%	21.5%	20.6%	20.5%	–1.8%

Table 5.—Travel to New England: 2001 through 2005

Travel Variable	Years					Average Annual Change Rate
	2001	2002	2003	2004	2005	
Travelers ('000) - New England	13,170	13,699	13,346	12,256	13,052	-0.1%
Travelers ('000) - No. New Eng.	6,738	6,885	6,625	6,393	6,811	0.4%
Travelers ('000) - So. New Eng.	6,432	6,814	6,721	5,863	6,241	-0.4%
Participation Rates	Years					Average Annual Change Rate
	2001	2002	2003	2004	2005	
Part. rate to New England	6.5%	6.7%	6.4%	5.7%	6.0%	-1.6%
Part. rate to No. New England	3.3%	3.4%	3.2%	3.0%	3.2%	-0.6%
Part. rate to So. New England	3.2%	3.3%	3.2%	2.7%	2.9%	-2.0%
Portion from Northeast Market	Years					Average Annual Change Rate
	2001	2002	2003	2004	2005	
% from No' east to No. New Eng.	61.7%	64.7%	65.9%	66.9%	58.2%	-1.2%
% from No' east to So. New Eng.	51.4%	56.8%	58.3%	51.6%	52.5%	0.8%

*Data were not available for 2006 for subregional analysis.

level. These included general sightseeing, going to the beach, attending a special event, visiting a national park, shopping, backpacking/hiking, golfing, bicycle riding, skiing, outdoor sports, theme park visitation, visiting family and friends, and visiting a spa or retreat. Between 2001 and 2006, there were declines in most of these activities (exceptions were spa/retreat visitation and skiing) but most had only 1-2 percent average annual declines. Four activities – backpacking/hiking, golf, playing outdoor sports, and visiting a theme park – had average annual declines of more than 3 percent during the study period.

5.0 DISCUSSION AND IMPLICATIONS

This review of New England and Northeast destination travelers and their respective markets enhances the understanding of the market potential of the region and its potential to attract travelers. It will also provide another viewpoint on the recovery of the tourism sector post 9-11.

New England's tourism industry had been on the rise in the 1990s prior to 9-11. Previous studies reported a rather dramatic decline in travel to New

Table 6.—Recreation activity participation rates of vacation travelers: 2001 to 2006

Number of Trips	Years					Average Annual Change Rate
	2001	2002	2003	2004	2005	
Going to beach	11.6%	11.7%	11.7%	11.2%	11.1%	-1.0%
General sightseeing	18.7%	18.3%	18.8%	18.9%	17.3%	-1.1%
Attending event	7.6%	7.5%	7.7%	7.6%	7.2%	-1.6%
Shopping	14.8%	14.0%	14.6%	14.4%	13.7%	-1.5%
Visiting national park	6.2%	5.9%	5.8%	5.3%	5.5%	-1.9%
Playing golf	2.4%	2.5%	2.3%	2.2%	2.0%	-5.5%
Backpacking/hiking	3.0%	2.8%	3.0%	2.6%	2.6%	-3.3%
Bicycle riding	1.4%	1.5%	1.5%	1.4%	1.3%	-2.9%
Skiing	0.8%	0.8%	0.9%	0.8%	0.9%	0.6%
Engaging in outdoor sports	6.3%	5.8%	5.1%	5.0%	4.9%	-3.6%
Visiting theme park	25.7%	24.2%	23.0%	22.8%	23.1%	-3.4%
Visiting family and friends	13.9%	13.2%	14.6%	13.7%	13.8%	-0.4%
Visiting health spa/retreat	0.8%	0.9%	1.0%	1.2%	0.9%	3.7%

England following 9-11. Using a different data set, MediaMark's *TRR* data, this study also found that declines were evident, but these declines were not as dramatic as previously reported. One possible reason for the discrepancy is the total number of years for which data are available. For most of the data sets analyzed in previous research, the actual report year often lags the stated report year by 1 to 2 years.

Another explanation may be that the analysis did not include data from years prior to 9-11. It is possible that data from those years would have revealed strong participation rates and, thus post 9-11 declines would have been more pronounced. Unfortunately, these data were not available at the time of the review.

The Northeast United States, and specifically the New England Region, is relatively compact which facilitates domestic and vacation travel, especially by car. Mintel Reports (2003) research indicates that, after 9-11, travelers reacting to financial concerns and lingering safety fears were less likely to fly and more likely to drive to their vacation destinations (compared to the 3 years prior to 2001). In addition, when people did travel after 9-11, they often opted for shorter vacations (25 percent of respondents indicated they did so), both to save money and to take less time away from work.

Finally, there is some evidence here that Northern New England experienced a smaller decline in travel interest than Southern New England after 9-11. This may reflect an interest in places where abundant recreation and vacation destination opportunities exist, and where a different pace of life offers the opportunity to escape the major urban areas of the Northeast United States. This will need to be further monitored over time as a potential evolving trend in travel behavior in this region. Further data monitoring and analysis will also need to be undertaken to determine if travel rates will return to pre-9-11 rates.

6.0 CITATIONS

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