NEW ENGLAND'S TRAVEL AND TOURISM MARKETS: TRENDS IN GEOGRAPHIC TARGET MARKETS BEYOND THE 90s – THE Y2K DECADE

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Abstract.—The purpose of this paper is to examine the travel and lifestyle activity trends in the years beyond the 1990s—the Y2K decade—for geographic markets of interest to New England travel destinations. The central theme is examining New England's potential primary, secondary, and tertiary geographic markets in detail.

1.0 INTRODUCTION

This line of research was last updated in 2006 and the data covered was just 4 years after September 11, 2001 (9/11) (Warnick and Bojanic 2007). This update assesses participation in recreation and travel activities from 1995 through 2007 and analyzes the recovery of the New England tourism markets after 9/11. Coming off a very strong late-1990s financial upswing, the U.S. economy grew rapidly before 9/11, interest in recreational activities and travel was increasing, and travel trends were very positive for the greater New England region. The post-9/11 world has had to confront severe economic challenges, such as the Iraq War, corporate fraud, and eventually the mortgage crisis and rapidly increasing fuel prices. All of these hardships have combined to change the outlook for both recreation and tourism destinations, which now face an uncertain future. Other demographic issues affecting the Northeast region include outmigration and an aging population.

Previous studies (Warnick 1992a, 1992b, 1993, 1997, 2000, 2001, 2008; Warnick and Bojanik 2007) have summarized data on domestic travel to the Northeast and New England. Warnick and Bojanik (2007) reported that rates of domestic travel (travel by U.S. residents to U.S. destinations) declined between 2000 and 2005. These rates have recovered somewhat since 2005 but without a return to robust pre-9/11 levels. After 9/11, vacation travel declined the most in the regional markets, in some cases rather dramatically. As travel participation rebounded in the few years after 9/11, the overall trend has been one of "no growth."

Another line of analysis by Warnick and Bojanik (2007) looked at recreation and sports activity participation of people living in specific geographic markets. Between 2000 and 2005, participation in golf declined while tennis remained relatively stable and skiing and biking actually grew. Outdoor recreation markets had mixed results, with interest in wildlife and the environment continuing to decline while camping and hiking grew across nearly all markets. Hunting remained stable, but rates varied dramatically even within the primary markets of metropolitan areas. Household interest in physical fitness and exercise and cultural activities remained stable, but interest in the nation's heritage grew through 9/11 and remained stable across nearly all markets. Interest in history and heritage grew in those areas most directly affected by the 9/11 tragedy, New York City and Mid-Atlantic metropolitan areas, where some of New England's secondary target markets are located.

2.0 PURPOSE OF STUDY

The purpose of this study is to: 1) examine domestic travel and travel recreation activities of residents of New England and other nearby markets during and beyond the 1990s into the Y2K decade; 2) identify changing patterns in travel and recreation activity of people who live in geographic markets of interest to New England destinations over a longer period of time post-9/11; and 3) examine additional market conditions that have not yet been examined in the context of trend analysis. Due to limited space in this publication, not all of the data can be presented here and primary reporting and analysis will focus on the major findings.

3.0 METHOD

In previous studies, two databases were examined to more fully understand U.S. travel trends: Simmons Market Research Bureau's *Study of Media and Markets* and Standard Rate and Data Service's (SRDS) *Lifestyle Market Analyst*. With data now available through 2007, this research and trend analysis has been updated and expanded using SRDS data exclusively. Refer to Warnick and Bojanik (2007) for more detailed information about the methodology and variable selection for this research.

4.0 SELECTED FINDINGS

4.1 Travel Lifestyle Activity by Geographic Markets.

Domestic travel activity has remained relatively stable in the New England travel markets while vacation travel rates are higher for the New England region's primary, secondary, and tertiary markets than the national markets (Table 1). Table 1 also lists New England's primary, secondary, and tertiary markets that are examined in this research.

4.2 Domestic Travel Lifestyle.

None of New England's primary metropolitan markets experienced strong growth (>4 percent per year)

Table 1.—Travel patterns for New England destination markets for 2007 with trends for 1995-2007

Markets	Domestic Travel[a]	'95-'07 Dom. Trav. Trend	Vacation Travel[a]	'95-'07 Vac. Trav. Trend
1995 National Rates	34.9%		37.5%	
2001 National Rates	41.5%	S	34.3%	G*
2007 National Rates	35.1%		39.5%*	
1995 All New England Markets	35.8%		39.1%*	
2001 All New England Markets	42.2%	S	35.3%*	G*
2007 All New England Markets	35.8%		42.2%*	
Primary Markets 2007	35.6%	S	42.5%*	G*
Albany, NY	35.4%	NG	27.4%*	NG*
Bangor, ME	31.8%	NG	29.7%*	D*
Boston, MA	36.2%	S	48.1%*	G*
Burlington, VT/Plattsburgh, NY	34.7%	S	43.1%*	G*
Hartford/New Haven, CT	36.6%	NG	44.0%*	G*
Portland/Auburn, ME	34.2%	S	36.7%*	G*
Providence, RI/New Bedford, MA	34.7%	S	39.0%*	G*
Springfield, MA	34.2%	S	39.8%*	G*
Secondary Markets 2007	36.1%	S	43.0%*	G*
Harrisburg, PA	35.0%	G	34.5%*	G*
Philadelphia, PA	36.3%	S	31.5%*	G*
Scranton-Wilkes Barre, PA	34.3%	S	34.5%*	S*
Syracuse, NY	34.8%	S	36.8%*	G*
New York City, NY	36.4%	S	46.2%*	G*
Tertiary Markets 2007	35.6%	S	41.0%*	G*
Baltimore, MD	35.7%	S	39.6%*	G*
Cleveland, OH	36.4%	NG	34.9%*	S*
Pittsburgh, PA	34.3%	NG	32.3%*	S*
Washington, DC	36.5%	S	47.2%*	SG*
Atlanta, GA	36.2%	G	44.6%*	SG*
Charlotte, NC	33.8%	G	38.8%*	SG*
Raleigh/Durham, NC	34.0%	G	42.5%*	SG*

[a]Percent of people from each market that participated in each kind of travel in a given year
* Vacation travel data available through 2005 only; no data for 2006/2007

Key: SD = Strong Decline (>-2%/yr); D = Decline (>0 to -2%/yr); NG = No Growth (at or near 0%/yr); S = Stable (positive, but <2%/yr); G = Growth (2% to 4%/yr); SG = Strong Growth (>4%/ yr) in domestic travel during this period. Albany, NY; Bangor, ME; and Hartford, CT experienced no-growth trends. Metropolitan areas with the highest travel participation rates in 2007 were Boston (36.2 percent) and Hartford/New Haven (36.6 percent). However, it is also noteworthy that the most recent year examined here, 2007, reflects an overall downward trend in domestic travel activity. Domestic travel in the primary markets peaked in 2000 at 43.2 percent.

New England's secondary markets were also relatively stable and metropolitan areas had rates similar to the national rates for domestic travel. Harrisburg, PA, was the only growth market for travel in this sub-region. The tertiary markets exhibited more growth in domestic travel, but the overall region trend was stable for the period examined. The evolving markets of Charlotte, NC; Atlanta, GA; and Raleigh/Durham, NC were the only growth markets for domestic travel.

4.3 Vacation Travel Lifestyle

A better indicator for tourism travel is "vacation travel" collected by SRDS. Rates are typically higher here and these data likely reflect more region-based travel. The national vacation travel market increased between 2 and 4 percent per year between 1995 and 2007. The participation rate for vacation travel was higher for the New England markets (42.2 percent of all households participated in vacation travel) than the national rate (39.5 percent). Within New England's primary markets, nearly all metro areas experienced growth, with the exception of Albany (no growth) and Bangor (decline). Of all the geographic market areas in this analysis, Boston (48.1 percent), Washington, D.C. (47.2 percent), and New York City (46.2 percent) had the highest household participation rates for vacation travel.

Vacation travel rates in New England's secondary and tertiary markets grew and exceeded the national rates by 2007. Three of the tertiary market metro areas exhibited strong growth patterns from 1995 through 2005 for vacation travel: Atlanta (44.6 percent), Charlotte (38.8 percent), and Raleigh/Durham (42.5 percent). (Please note that at the time of this analysis, vacation travel data were available only for 1995 through 2005; data for 2006 and 2007 had not yet been released.)

4.4 Recreation and Sport Lifestyle Market Activity by Geographic Markets (Table 2)

Biking and tennis participation rates grew during the review period while skiing and golf participation rates have remained stable. Nearly 21 percent of all households in the New England market area participated in biking, but this activity peaked at 23.5 percent in 2000. Tennis enjoyed a rebound in the overall New England market area with a growth trend of 2 to 4 percent annually and the rates generally exceeded the national rates for the activity. Household participation rates for tennis were 6.5 percent nationally and 7.6 percent for the New England regional markets in the most recent year, 2007. Skiing participation rates also exceeded the national rates, but skiing rates were stable overall during the period for both the national and the overall New England markets. Household participation rates for skiing were 7.2 percent nationally and 8.1 percent for the New England regional markets by the end of the review period in 2007. Nationally, golf enjoyed a strong growth pattern in the late 1990s, but its popularity has generally declined since then. Household participation rates for golf were 17.6 percent nationally and 16.4 percent for the New England markets in 2007.

Golf Lifestyle. Households in three of the metropolitan areas (Albany, Hartford/New Haven, and Springfield, MA) had declining golf participation rates between 1995 and 2007. The secondary and tertiary markets were also no-growth regions for golf. Philadelphia, PA; Syracuse, NY; Cleveland, OH; and Pittsburgh, PA all had declining markets for golf while Harrisburg, Washington, D.C., and the southern tier markets (Atlanta, Charlotte, and Raleigh/Durham) remained stable over the period. Still, next to biking, this activity enjoys the highest household participation rates of the four activities examined.

Tennis Lifestyle. Tennis, which has traditionally had strong household participation rates in the New England region, has continued to show growth trend patterns through the late Y2K decade. The New York

Table 2.—Recreation and sport activity participation rates by market for 2007 plus 1995-2007 trends

Markets	Golf	Golf Trend	Tennis	Tennis Trend	Skiing	Skiing Trend	Biking	Biking Trend
1995 National Rates	19.8%		5.8%		7.4%		17.1%	
2001 National Rates	21.2%	NG*	6.9%	G*	9.0%	S*	24.3%	G*
2007 National Rates	17.6%		6.5%		7.2%		20.8%	
1995 All New England Markets	18.4%		7.0%		7.3%		19.2%	
2001 All New England Markets	20.0%	NG*	8.4%	G*	10.0%	S*	23.4%	G*
2007 All New England Markets	16.4%		7.6%		8.1%		19.8%	
Primary Markets 2007	17.8%	NG	7.0%	S	11.8%	NG	20.8%	G
Albany	19.7%	D	6.4%	S	11.4%	D	21.9%	G
Bangor	14.6%	S	4.1%	G	10.6%	NG	17.6%	G
Boston	18.2%	NG	7.7%	S	12.7%	NG	20.6%	G
Burlington/Plattsburgh	17.3%	S	6.3%	G	18.3%	S	24.2%	G
Hartford/New Haven	17.6%	D	7.4%	S	9.3%	D	19.8%	G
Portland/Auburn	16.5%	S	6.0%	G	14.7%	S	21.1%	G
Providence/New Bedford	17.3%	NG	6.5%	G	8.9%	S	20.5%	G
Springfield	18.3%	D	5.8%	S	9.1%	D	21.9%	G
Secondary Markets 2007	14.8%	NG	7.9%	S	7.7%	S	20.4%	G
Harrisburg	17.3%	S	5.7%	G	5.9%	G	18.4%	SG
Philadelphia	15.9%	D	7.3%	S	7.3%	S	20.5%	G
Scranton-Wilkes Barre	16.1%	NG	4.3%	G	6.4%	S	16.7%	SG
Syracuse	22.2%	D	5.5%	S	9.2%	NG	21.0%	SG
New York City	14.9%	NG	9.1%	S	12.1%	NG	19.6%	G
Tertiary Markets 2007	17.5%	NG	7.7%	G	6.5%	G	19.5%	SG
Baltimore	14.6%	NG	7.2%	S	6.9%	S	18.4%	G
Cleveland	21.6%	D	5.2%	G	5.6%	S	22.1%	G
Pittsburgh	19.9%	D	4.6%	S	6.2%	NG	17.2%	SG
Washington, DC	15.3%	S	9.2%	G	8.2%	G	20.4%	G
Atlanta	16.6%	S	10.1%	G	5.7%	SG	16.5%	SG
Charlotte	18.3%	S	6.8%	G	6.2%	SG	15.5%	SG
Raleigh/Durham	17.2%	S	7.9%	SG	5.5%	SG	17.7%	SG

Key: SD = Strong Decline (>-2%/yr); D = Decline (>0 to -2%/yr); NG = No Growth (at or near 0%/yr);
S = Stable (positive, but <2%/yr); G = Growth (2% to 4%/yr); SG = Strong Growth (>4%/ yr)

City metropolitan area has a household participation rate of 9.1 percent and is a relatively stable market. Those metro market areas in the primary market that experienced 2- to 4-percent growth include Burlington, VT/Plattsburgh, NY; Portland/Auburn, ME; Providence, RI/New Bedford, MA; and Bangor. The strongest tertiary markets for tennis in 2007 were Washington, D.C. (9.2 percent) and Atlanta (10.1 percent). Raleigh/Durham (7.0-percent participation in tennis in 2007) had the strongest growth trend pattern for the period, with rates increasing more than 4 percent per year.

Bicycling Lifestyle. In all the New England markets, bicycling participation rates increased and were near or higher than the national averages. Bicycling is growing in all primary, secondary, and tertiary markets, and several metropolitan market areas in the secondary and tertiary areas are growing at rates exceeding 4 percent per year (a strong growth trend). Primary metro areas with high bicycling rates include Albany, Springfield, and Burlington/Plattsburgh. The overall rates in the secondary markets were not as high. In the tertiary markets, Cleveland had the highest rate of bicycling participation (22.1 percent) in 2007. The metropolitan areas of Pittsburgh, Atlanta, and Charlotte all had overall growth rates that exceeded 4 percent per year in household bicycling participation.

Skiing Lifestyle. Nationally the skiing markets remained relatively stable. Participation rates were 7.4 percent in 1995, peaked at 9.0 percent in 2001, and were back down to 7.2 percent by 2007. In 1995, the skiing rate in the New England market areas was 7.3 percent; by 2007 it was up to 8.1 percent. Although these rates are higher than the national averages, they are hardly keeping pace with population growth. The primary market overall had “no growth” between 1995 and 2007, but all of the region’s metro areas have rates above the national average. Three of the market areas experienced declining skiing participation rates during the period: Springfield, Hartford/New Haven, and Albany. The secondary markets remained stable during the review period for skiing. Rates were considerably lower in the tertiary markets with the exceptions of Washington, D.C. (growth), Atlanta, (strong growth), Charlotte (strong growth), and Raleigh/Durham (strong growth).

4.5 Outdoor Recreation Lifestyle Market Activity by Geographic Markets (Table 3).

Nearly 29 percent of all households in the United States fished in 2007 compared to 23.8 percent in 1995. Camping/hiking and fishing grew in the New England markets as well, but the rates for both activities were below the national rates and there was wide variability among the metropolitan area markets in the region. For example, the rates for camping/hiking topped 38.5 percent in Burlington/Plattsburgh but reached only 13.6 percent in the New York City metro area in 2007. Similar variability was also found in hunting and fishing participation rates. After years of growing interest in wildlife and the environment, the rate of interest nationally (15.1 percent) has returned to a stable overall trend and the overall New England market rate in 2007 (15.5 percent) showed no growth. The New England market area experienced growth in camping/hiking with a 2007 household participation rate of 19.9 percent, but this percentage was lower than the national average of 25.5 percent. Hunting enjoyed a stable pattern of activity between 1995 and 2007 in the New England market, and grew nationally. Although the fishing rates for the New England market exhibited a growth trend, the overall household participation rate for New England (22.4 percent) is still below the national rate (28.8 percent).

Interest in Wildlife and the Environment. The household participation rate (15.1 percent) for interest in the environment and wildlife in the New England markets was about the same rate as the national rate (15.5 percent). All New England metropolitan areas experienced either a stable or no-growth trend pattern. Only Burlington/Plattsburgh in the primary market area and Harrisburg and Syracuse in the secondary market area experienced growth. Hartford/New Haven and New York City actually experienced declining interest in wildlife and the environment. While metropolitan markets also do vary substantially, 10 of 20 metro areas had higher 2007 rates for interest in wildlife and the environment than the national rate.

Camping/Hiking Lifestyles. This activity displayed an overall growth pattern among most of the metropolitan markets reviewed here. The exceptions were Syracuse, New York City, and Cleveland, which all had stable rates. By 2007, Burlington/Plattsburgh (38.5 percent) and Portland/Auburn had rates that were 10 percent higher than the national and regional rates.

Hunting Lifestyles. Hunting probably had the most variability of any activity within the metropolitan areas examined. Bangor had a stable participation rate of 29.9 percent while New York City’s rate was only 7.3 percent; this disparity likely reflects the relative lack of available hunting areas around New York City compared to Bangor. Hunting participation rates were stable in the primary and secondary markets. Five metropolitan markets exhibited growth in hunting participation rates: Boston (9.0 percent), Portland/Auburn (21.8 percent), Providence/New Bedford (8.4 percent), Springfield (12.4 percent), and Harrisburg (23.9 percent). Hunting participation rates did not decline in any of the target market areas. Although hunting participation grew in four markets in the tertiary region (Washington, D.C.; Atlanta; Charlotte; and Raleigh/Durham), overall household participation rates in those markets in 2007 still remained below the national rate of 17.2 percent.

Table 3.—Outdoor activity participation rates for New England destination markets with trends for 1995-2007

Markets	Wildlife	Wildlife Trend	Camp/Hike	Camp/Hike Trend	Hunting	Hunting Trend	Fishing	Fishing Trend
1995 National Rates	16.4%		22.6%		15.4%		23.8%	
2001 National Rates	19.0%	S*	28.5%	G*	18.8%	G	31.1%	G*
2007 National Rates	15.4%		25.5%		17.2%		28.8%	
1995 All New England Markets	16.9%		17.0%		11.0%		17.3%	
2001 All New England Markets	18.5%		22.2%		13.3%		23.8%	
2007 All New England Markets	15.1%	NG*	19.9%	G*	12.4%	S*	22.4%	G*
Primary Markets 2007	17.1%	S	24.9%	G	12.7%	S	23.3%	G
Albany	19.4%	S	29.5%	G	17.5%	S	27.1%	G
Bangor	21.7%	S	29.2%	G	29.9%	S	38.7%	G
Boston	15.6%	NG	21.8%	G	9.0%	G	19.6%	G
Burlington/Plattsburgh	23.2%	G	38.5%	G	26.8%	S	34.3%	G
Hartford/New Haven	16.0%	D	21.6%	G	10.2%	S	21.5%	G
Portland/Auburn	21.5%	S	35.2%	G	21.8%	G	32.0%	G
Providence/New Bedford	14.9%	NG	19.7%	G	8.4%	G	21.1%	G
Springfield	17.9%	S	25.4%	G	12.4%	G	23.9%	G
Secondary Markets	14.7%	NG	16.5%	G	10.6%	S	20.1%	G
Harrisburg	17.3%	G	27.2%	G	23.9%	G	26.7%	G
Philadelphia	15.0%	NG	17.3%	G	11.2%	S	21.5%	G
Scranton-Wilkes Barre	18.2%	S	26.5%	G	27.4%	S	31.4%	S
Syracuse	19.4%	G	29.7%	S	19.7%	S	28.8%	G
New York City	13.8%	D	13.6%	S	7.3%	S	17.5%	G
Tertiary Markets	14.4%	S	21.2%	G	14.4%	G	24.7%	G
Baltimore	14.6%	NG	18.3%	G	11.5%	S	21.6%	G
Cleveland	14.8%	NG	23.2%	S	13.9%	S	25.0%	G
Pittsburgh	14.7%	NG	23.6%	G	12.9%	S	26.3%	G
Washington, DC	14.3%	NG	19.1%	G	12.3%	G	20.4%	G
Atlanta	13.8%	S	21.6%	G	13.8%	G	26.1%	SG
Charlotte	14.7%	S	23.5%	G	16.1%	G	29.3%	G
Raleigh/Durham	14.7%	S	19.7%	G	14.1%	G	28.3%	G

Key: SD = Strong Decline (>-2%/yr); D = Decline (>0 to -2%/yr); NG = No Growth (at or near 0%/yr); S = Stable (positive, but <2%/yr); G = Growth (2% to 4%/yr); SG = Strong Growth (>4%/ yr)

Fishing Lifestyles. Eighteen of the 20 metropolitan markets experienced growth trend patterns for fishing between 1995 and 2007. The only metro area among all regions examined that did not grow was Scranton/Wilkes Barre, PA. Rates for fishing also varied widely in the primary market. Rates in 2007 were highest in Bangor (38.7 percent) and Burlington (34.3 percent) and lowest in Boston (19.6 percent). In the secondary markets, Scranton-Wilkes Barre had the highest fishing participation rate (31.4 percent) and New York City had the lowest rate (17.5 percent). All of the tertiary markets exhibited growth trends for fishing. Charlotte had the highest participation rate in this area by 2007 (29.3 percent), but Atlanta experienced the strongest growth during the review period.

4.6 Fitness Lifestyle Market Activity by Geographic Markets (Table 4).

Between 1995 and 2007, fitness walking remained stable and fitness program participation grew across all three regions. The primary market participation rates for fitness walking (36.8 percent) and fitness programs (39.8 percent) were above the national rates of 34.2 percent and 38.3 percent, respectively.

Fitness Walking Lifestyle. Fitness walking participation rates grew in Portland/Bangor and Burlington/Plattsburgh while participation rates in the other primary markets remained stable. In the secondary markets, all metro areas remained stable. In the tertiary markets, Atlanta, Charlotte, and Raleigh/

Table 4.—Fitness and cultural/historic activity participation rates for New England destination markets with 1995-2007 trends

Markets	Fitness Walking	Fitness Walking Trend	Fitness/ Exercise	Fitness/ Exercise Trend	Cultural Activity	Cultural Activity Trend	History & Heritage	History & Heritage Trend
1995 National Rates	34.3%		34.0%		13.6%		4.9%	
2001 National Rates	36.9%	S*	41.6%	S*	19.4%	G*	7.4%	
2007 National Rates	34.2%		38.3%		16.9%		6.8%	SG*
1995 All New England Markets	34.6%		35.3%		15.6%		5.0%	
2001 All New England Markets	37.5%	S*	43.4%	S*	22.0%	SG*	7.6%	
2007 All New England Markets	37.2%		39.8%		19.3%		6.8%	G*
Primary Markets	36.8%	S	39.6%	G	18.7%	G	6.8%	G
Albany	36.7%	S	38.2%	G	18.0%	G	7.8%	G
Bangor	39.0%	S	35.1%	G	14.5%	SG	7.5%	SG
Boston	36.0%	S	40.8%	G	20.0%	G	6.5%	G
Burlington/Plattsburgh	38.6%	G	38.6%	G	16.8%	G	7.5%	SG
Hartford/New Haven	36.1%	S	39.9%	S	19.5%	G	6.5%	SG
Portland/Auburn	40.0%	G	38.1%	G	16.9%	SG	6.5%	G
Providence/New Bedford	37.2%	S	38.9%	S	17.4%	SG	6.2%	SG
Springfield	36.0%	S	39.3%	G	17.9%	G	6.4%	G
Secondary Markets 2007	34.0%	S	40.0%	G	20.0%	G	6.5%	G
Harrisburg	33.4%	S	40.1%	G	18.7%	G	7.2%	SG
Philadelphia	33.8%	S	37.3%	G	14.5%	G	7.9%	SG
Scranton-Wilkes Barre	35.8%	S	35.8%	G	12.9%	G	7.5%	SG
Syracuse	35.4%	S	38.3%	S	15.8%	S	7.1%	G
New York City	34.0%	S	40.6%	S	21.9%	G	6.0%	G
Tertiary Markets 2007	33.6%	S	39.8%	G	18.2%	G	7.1%	SG
Baltimore	32.3%	S	38.9%	G	18.9%	G	7.0%	G
Cleveland	33.9%	S	38.8%	S	15.9%	G	6.3%	G
Pittsburgh	35.2%	NG	38.7%	G	15.4%	S	6.8%	SG
Washington, DC	32.2%	S	41.8%	G	21.7%	G	7.8%	G
Atlanta	33.3%	G	39.5%	G	19.3%	SG	7.0%	SG
Charlotte	34.6%	G	38.4%	SG	14.6%	SG	7.4%	SG
Raleigh/Durham	35.1%	G	40.8%	G	18.2%	SG	7.1%	SG

Key: SD = Strong Decline (>-2%/yr); D = Decline (>0 to -2%/yr); NG = No Growth (at or near 0%/yr);
S = Stable (positive, but <2%/yr); G = Growth (2% to 4%/yr); SG = Strong Growth (>4%/ yr)

Durham each grew, Pittsburgh experienced no growth, and the others remained stable.

Fitness/Exercise Program Lifestyle. The New England market had a higher fitness program participation rate (39.8 percent) than the national average (38.2 percent). The primary, secondary, and tertiary market areas all experienced growth in this activity while the national rate was stable. Across market areas, all fitness program participation rates grew except in Hartford/New Haven, Providence/New Bedford, Syracuse, New York City, and Cleveland which remained stable. In 2007, the highest participation rates in the primary, secondary, and tertiary markets were in Boston (40.8 percent), New York City (40.6 percent), and Washington, D.C. (41.8 percent), respectively.

4.7 Cultural Activity and History/Heritage Interest Activity by Geographic Markets (Table 4).

For the period 1995-2007, nearly 17 percent of all U.S. households showed interest in cultural activities and 6.8 percent expressed interest in history and heritage. The rates in the New England overall market area (combined regions of primary, secondary, and tertiary) were higher for cultural activities (19.3percent) than the national rate (16.9 percent) and the rates for interest in history and heritage were the same as the national rate (6.8 percent) by 2007. The national rates for interest in history and heritage experienced strong growth over this time while history/heritage interest grew (but less strongly) in the New England region.

Cultural Activity Lifestyles. In the primary, secondary, and tertiary markets, 2007 participation in cultural activities was highest in Boston (20 percent), New York City (21.9 percent), and Washington, D.C. (21.7 percent), respectively. In the primary markets, participation rates in Bangor, Portland/Auburn, and Providence/New Bedford grew more than 4 percent per year (strong growth). Growth extended across all metropolitan areas in the secondary and tertiary regions except Syracuse and Pittsburgh, which remained stable. Strong growth occurred in cultural activity interest and participation in the three southern tier cities (Atlanta, Charlotte, and Raleigh/Durham).

History and Heritage Interest Lifestyle. Growth occurred in both the primary and secondary regions for participation in history/heritage activities and strong growth occurred in the tertiary region. In the primary market, Bangor, Portland/Auburn, Hartford/New Haven, and Providence/New Bedford experienced strong growth trends for interest in history and heritage activities. In the secondary region, all metropolitan areas grew and Harrisburg, Philadelphia, and Scranton-Wilkes Barre experienced strong growth trend patterns. The 2007 rate was highest in Philadelphia (7.9 percent). In the tertiary markets, Pittsburgh, Atlanta, Charlotte and Raleigh/Durham experienced strong growth and the highest 2007 participation rate was in Washington, D.C. (7.8 percent).

5.0 DISCUSSION AND CONCLUSIONS

Earlier studies indicated that the New England travel markets rebounded in the mid- to late- 1990s. However, examining the markets of interest to New England destinations provides a more up-to-date review of travel and recreational activities in the late Y2K decade and the SRDS Lifestyle Market Analyst is an excellent source of secondary data about these markets. This research found that domestic travel is relatively stable in the target markets examined. Vacation travel has rebounded in many metropolitan areas since 9/11 and has experienced some growth, but the growth is not as dramatic as suggested in previous research.

In this study, grouping New England's markets into primary, secondary, and tertiary areas provides new insights into how travel and activity patterns are changing. In addition, as the marketplace becomes more competitive, new markets evolve and some markets may become more or less important. The three southern tier market cities (Atlanta, Charlotte, and Raleigh/Durham) examined here are examples of currently changing market areas. Grouping and segmenting activities by geographic region also provide insights for potential market-targeting strategies and shows that metropolitan areas have varying travel and activity participation rates that grow or decline independently. This analysis also identifies the most active tourism markets and the most popular activities.

One limitation of the research is that the SRDS data link travelers from specific markets to specific activities but do not link actual participation in travel activities to specific destinations. That is, a certain percentage of New York City travelers may report participating in hunting, but this does not mean that the New York travelers necessarily participate in hunting while traveling. The link between activity participation and travel is only an association. Furthermore, the SRDS data provide only number of households and participation rates but do not address the frequency or intensity of participation; this omission continues to be a weakness of the dataset. Nonetheless, it is useful to know that New England-based travelers participate in selected recreation activities at levels well above the national average; this finding provides an important insight and suggests that these markets are robust.

One additional word of caution is needed when examining trend data. Rates of change over time were represented by a single number for each market area and each activity. Thus, one number represents the overall trend pattern and may fail to depict micro-trends within the larger trend. For example, participation in an activity can grow for 7 of 10 years and then decline in the last 3 years. The average annual change rate may represent a positive growth trend, but the last 3 years may suggest interest in the activity has changed and declined. Future trend analysis may benefit from weighted year analysis with the most recent years contributing more than the more distant years.

Within recreation, travel, sport, and cultural activity markets, more insights were gained by examining the geographic markets where people live. People living in New England's potential market areas live in active households. This research examined both where they are likely to come from and the trend conditions within those markets over time. These markets are dynamic and some change dramatically over time. This monitoring of trends and activities by markets will continue to be necessary if New England is to maintain its status as a major tourism destination region.

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