# NEW ENGLAND'S NORTHEAST RECREATION ACTIVITY MARKETS: TRENDS IN THE 90S

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Abstract: The purpose of this study was to examine activity markets within three major geographic areas in the Northeast for the period of 1994-1996. The activity markets examined included travel activities; recreation/sport activities; outdoor activities; interest in fitness activities and cultural/historic interests. The geographic markets of each activity group were examined by primary, secondary and tertiary markets of Central New England. Findings here indicated that the activity markets with potential to travel to New England show signs of growing; however, there exists considerable variation between the different geographic areas.

## Introduction

Recent studies have examined trends in the activity and geographic markets for New England's travelers and recreation participants (Warnick 1993, 1994, 1995, 1996 and Kuentzel, Robertson and Ramaswamy, 1995). These studies have indicated that domestic travel in the Northeast has become a mature market and also very different in terms of changes by state within the Northeast. This paper examines activity markets by their major metro areas and groups these areas into primary, secondary and tertiary markets to examine how trends within the activity markets and by geographic locale may affect the travel potential to New England.

In Warnick's previous studies of geographic markets, the markets were examined by large geographic regions and their travel behavior in selecting New England as a primary destination. Specifically, all of the Northeast was considered as one major market and compared to other regions (the South, Midwest and West) when individuals indicated travel to New England as a primary destination choice. These studies indicated that New England was considered to be a mature destination region for domestic travel. The region had not rebounded to the peak market demand of the mid-80s. However, the most recent study (Warnick 1996) indicated some rebound in the travel patterns. The Vermont and New Hampshire travel study (Kuentzel, Robertson and Ramaswamy, 1995) showed domestic travel to these states had also become mature, but they also found very different changes in travel patterns by state residence and primary destination of the visitors. Therefore, evidence does suggest that the future of travel and recreational pursuits in New England are changing and need further attention and review. Specifically, it may be helpful to examine activities and changes within these activities by geographic subregions of the Northeast to further assess the market potential of New England.

## Purposes of Study

The purposes of this research paper are two-fold: 1) to examine and update recreation activity markets for New England in the 90s by specifically examining activity trends for 1994, 1995 and 1996; and 2) to continue to identify changing patterns in these activity trends by examining the geographic markets by primary, secondary and tertiary regions of those who may potentially visited New England.

## Method

A limitation of Warnick's studies and justly noted is the lag time in monitoring the trends. The data are usually two to three years behind the current publication time. This was simply a result of the release time of the Simmons Market Research Bureau's activity data to universities for research and teaching purposes. However, other data sets exist which now allow more timely review of the travel and recreational trend analysis.

Standard Rate and Data Service's (SRDS) *Lifestyle Market Analyst* has been published on a yearly basis since the early 90s and provides perhaps the most recent and timely data available of selected markets. In additional to profiling the market for the activity, SRDS provides data specific to over 200 major markets areas. These data are provide at the local, regional and national levels and provide three distinct ways of identifying who one's customers are, how they differ from market to market and how they spend their time in over 60 different lifestyle activities.

SRDS' data are based on information collected from more than 20 million households collected on an annual basis. This includes extensive information on the interests, hobbies and activities popular in each geographic and demographic market. The data come from a joint venture of SRDS and NDL (National Demographic and Lifestyles, Inc., a subsidiary of R.L. Polk and Company). The demographic and lifestyle profiles collect in this data set are updated annually and the release of the 1990 census information enables NDL to summarize, weight and update the profiles to be reflective of the U.S. population and their respective markets. NDL uses a variety of sources to derive its estimates including Claritas for its household counts and demographic estimates.

NDL collects the data from U.S. household by inserting consumer information questionnaires into the packaging of a variety of consumer goods. From the large 20 plus million household surveys a sample of over 10 million, which represents data collect over one year, from November to November, are weighted and adjusted to reflect the entire U.S. population and its respective regional locations. The data are collected and represent 211 DMAs (designated market areas) as compiled by the Nielsen Company. These markets, DMAs, are more commonly known as TV or broadcast markets and are largely groupings of counties with commercial stations located in metro/central areas. DMAs are non-overlapping areas used for planning, buying and evaluating television audiences. Lifestyle markets and activities are created by NDL in conjunction with product consumption and media data compiled by Mediamark Research, Inc. Respondents to NDL's questionnaire are asked to report their participation in each of 69 different activities. Households are considered to be involved in an activity if at least one adult member is a regular or frequent participant within the previous year. An adult is any person over 18 years of age or older living in the household. The activities are assembled into home life; good life; investing and money; sports, fitness and health; great outdoors; hobbies and interests; and high tech activity groupings with individual statistics reported on each individual activity and by each geographic market. Data is also collected on 40 different demographic variables.

For this study, three major groupings of geographic markets were developed: primary, secondary and tertiary markets. Markets were based on their location relative to the center of New England and respective drive times. Primary markets were those major markets which are located within a three - five hour drive time of Central New England and include the metro areas of Albany, New York; Bangor, Maine; Boston, Massachusetts; Hartford/New Haven, Connecticut; New York City; Portland/Auburn, Maine; Providence, Rhode Island/New Bedford, Massachusetts; and Springfield, Massachusetts. These geographic areas are likely to make-up an estimated 50-60% of the travel market to the region. Secondary markets were those major markets which are located from a five to eight hour drive time of Central New England and include the metro areas of Harrisburg; Philadelphia; and Scranton-Wilkes Barre, Pennsylvania and Syracuse, New York. These geographic areas are considered to make-up an estimated 20-30% of the travel market to the region. Tertiary markets were those major markets which are located over an eight hour drive time of Central New England and include the metro areas of Baltimore, Maryland; Cleveland, Ohio; Pittsburgh, Pennsylvania and Washington, DC. These geographic areas are considered to make-up an estimated 10-20% of the travel market to the region.

For the purposes of this study, activity groupings included travel activities; recreation/sport activities; outdoor activities; interest in fitness activities and cultural/historic interests. Specifically within each groupings include travel activities -- domestic travel and travel for vacation; recreation/sport activities -- golf, tennis, ski and biking; outdoor activities -- interest in wildlife and the environment, camping/hiking, hunting and fishing; interest in fitness activities -- fitness walking and fitness and exercise programs; and cultural/historic interests -- attending cultural activities and interest in history and America's heritage. "Travel" in this study is believe to represent those households with individuals who have traveled over 100 miles one-way, overnight to an away-from-home destination. "Vacation travel" represents those households with individuals who traveled away from home for vacation purposes with no mileage restrictions.

Participation rates of households within major metro markets were developed by activity and geographic market and summed to reflect the primary, secondary and tertiary areas and compare to national, regional and internal geographic markets. When the primary, secondary and tertiary areas are combined, they are considered to be the total Northeast market for New England. An average annual adjusted percentage change rate and descriptive statistics were used to examine each of the activity markets. The change rates were compared by indexing metro rates to the national rates. Each trend year reflects the average participation for the previous three years. This serves to be a three point moving average for each activity market. For example, 1994 data would reflect the average for 1992, 1993 and 1994 data on activity participation. Thus, this study's data actually covers a moving average of participation for activities from 1992 through 1996. In tables which follow, activity trends for the years 1994 through 1996 are described on one of five different patterns -- decline trend (declining more than 1% per year); stable trend (no change); growth trend (increasing more than 1% per year); stable/decline trend (declining less than 1% per year) and stable/growth (increasing less than 1% per year).

The tables presented in this study provided information which can be compared three ways. Comparisons can be made from: 1) New England's total northeast markets to national rates; 2) the primary, secondary and tertiary rates compared to the overall New England Northeast rates; and 3) the metro rates within each of the primary, secondary and tertiary areas.

**Selected Findings**
Discussions here will address each of the activity markets with specific data presented in each of the following tables. Only key findings are discussed, but readers are encouraged to examine in detail the subregion and metro specific trends and rates.

Table 1. Geographic Markets for New England Destinations for Travel Activities.

| Geographic Region | Travel | Vacation Travel |
|---|---|---|
| National Rates | 34.5% (D)* | 37.6% (S) |
| All New England Mkts (Prim., Sec., Tert.) | 34.8% (D) | 38.4% (D) |
| 1. Primary Markets | 34.7% (D) | 38.5% (D) |
| Albany | 34.8 (S) | 38.4 (D) |
| Bangor | 29.0 (D) | 31.6 (D) |
| Boston | 35.9 (D) | 40.2 (D) |
| Hartford/New Haven | 36.6 (D) | 39.5 (D) |
| New York City Metro | 36.6 (D) | 40.6 (D) |
| Portland/Auburn | 31.7 (D) | 35.7 (D) |
| Providence/New Bedford | 33.8 (D) | 38.0 (D) |
| Springfield | 34.2 (D) | 38.0 (G) |
| 2. Secondary Markets | 34.5% (G) | 38.3% (S) |
| Harrisburg, PA | 32.8 (G) | 37.2 (S) |
| Philadelphia | 35.5 (S) | 39.5 (S) |
| Scranton-Wilkes Barre | 30.7 (S) | 34.2 (S) |
| Syracuse, NY | 35.5 (G) | 38.4 (G) |
| 3. Tertiary Markets | 35.4% (SG) | 38.2% (S) |
| Baltimore | 33.8 (D) | 38.0 (S) |
| Cleveland | 36.2 (G) | 38.0 (D) |
| Pittsburgh | 33.1 (G) | 36.5 (S) |
| Washington, DC | 36.9 (D) | 39.9 (S) |

*Participation rate noted is for most recent year, 1996.
Indicates trend of 1994- 1996: D=Decline; S=Stable; G=Growth; SD=Stable/Decline and SG=Stable/Growth.
Source. SRDS. 1994-1996. *Lifestyle Market Analyst*.

Travel Activities. Nationally, domestic travel is declining at a rate of slightly greater than one percent per year; however, vacation travel has remained relatively stable. Within all of New England major markets (primary, secondary and tertiary), the rate of participation who travel and travel for vacation purposes are declining. However, the rates for these markets are higher than the national rates. Overall, the primary market metro areas when combined are declining for both travel activities. Secondary and tertiary markets were growing for travel and stable for vacation travel participation. Table 1 contains these data.

Table 2. Geographic Markets -- Key Markets for Recreation and Sport Activities.

| Geographic Region | Golf | Tennis | Ski | Bike |
|---|---|---|---|---|
| National Rates | 19.6% (G)* | 5.4% (D) | 7.1% (D) | 16.7% (D) |
| All New England Mkts | 20.2% (SD) | 6.4% (D) | 8.1% (D) | 16.0% (G) |
| 1. Primary Markets | 16.5% (D) | 6.7% (D) | 9.1% (D) | 16.0% (D) |
| Albany | 22.2 (D) | 5.5 (D) | 12.2 (S) | 17.2 (G) |
| Bangor | 14.1 (D) | 3.3 (D) | 11.6 (G) | 15.8 (G) |
| Boston | 20.6 (D) | 6.7 (D) | 13.1 (D) | 18.0 (G) |
| Hartford/New Haven | 20.8 (D) | 6.5 (D) | 9.8 (D) | 15.4 (G) |
| New York City Metro | 15.1 (D) | 7.6 (S) | 7.8 (D) | 16.2 (G) |
| Portland/Auburn | 16.5 (D) | 4.5 (D) | 14.4 (D) | 16.7 (S) |
| Providence/New Bedford | 19.2 (D) | 5.3 (D) | 8.8 (D) | 17.0 (S) |
| Springfield | 20.0 (D) | 4.7 (D) | 10.1 (D) | 17.5 (G) |
| 2.Secondary Markets | 18.7% (S) | 5.3% (D) | 7.0% (S) | 14.9% (G) |
| Harrisburg, PA | 18.8 (D) | 4.6 (D) | 5.3 (G) | 12.9 (D) |
| Philadelphia | 18.2 (S) | 6.1 (D) | 7.0 (S) | 15.9 (G) |
| Scranton-Wilkes Barre | 16.5 (G) | 3.2 (D) | 6.3 (G) | 11.0 (S) |
| Syracuse, NY | 24.9 (D) | 4.4 (D) | 10.2 (D) | 16.4 (G) |
| 3.Tertiary Markets | 20.1% (G) | 5.9% (G) | 6.5% (G) | 15.6% (G) |
| Baltimore | 16.1 (D) | 6.2 (D) | 6.5 (D) | 15.9 (G) |
| Cleveland | 25.5 (S) | 4.3 (G) | 5.3 (G) | 15.9 (G) |
| Pittsburgh | 22.5 (G) | 4.0 (G) | 6.1 (G) | 11.7 (G) |
| Washington, DC | 16.7 (G) | 8.0 (D) | 7.6 (S) | 17.5 (G) |

*Participation rate noted is for most recent year, 1996. Indicates trend of 1994- 1996: D=Decline; S=Stable; G=Growth; SD=Stable/Decline and SG=Stable/Growth. Source. SRDS. 1994-1996. *Lifestyle Market Analyst.*

Table 3. Geographic Markets -- Key Markets for Outdoor Activities.

| Geographic Region | Wildlife | Camp/Hike | Hunt | Fish |
|---|---|---|---|---|
| National Rates | 16.2% (S)* | 22.7% (G) | 15.2% (G) | 23.3% (G) |
| All New England Mkts (Prim., Sec., Tert.) | 16.2% (SG) | 16.5% (SG) | 10.4% (SG) | 16.4% (G) |
| 1. Primary Markets | 16.1% (SD) | 15.4% (SG) | 7.9% (SG) | 14.6% (G) |
| Albany | 18.6 (D) | 26.1 (G) | 16.3 (G) | 20.3 (D) |
| Bangor | 21.2 (D) | 35.0 (D) | 28.7 (D) | 33.3 (D) |
| Boston | 17.5 (G) | 20.2 (G) | 8.1 (G) | 14.9 (G) |
| Hartford/New Haven | 16.5 (D) | 19.1 (G) | 9.4 (G) | 17.2 (G) |
| New York City Metro | 16.0 (S) | 12.0 (S) | 6.5 (D) | 13.5 (G) |
| Portland/Auburn | 21.4 (D) | 32.0 (G) | 20.2 (G) | 25.4 (D) |
| Providence/New Bedford | 15.9 (D) | 17.5 (G) | 7.4 (G) | 16.3 (G) |
| Springfield | 18.0 (S) | 22.5 (G) | 11.9 (G) | 19.6 (G) |
| 2.Secondary Markets | 17.0% (G) | 17.6% (S) | 14.6% (S) | 19.4% (G) |
| Harrisburg, PA | 17.3 (G) | 21.8 (D) | 22.3 (S) | 21.2 (D) |
| Philadelphia | 16.7 (G) | 14.8 (G) | 10.2 (G) | 17.0 (G) |
| Scranton-Wilkes Barre | 16.8 (G) | 21.1 (D) | 25.2 (D) | 26.1 (D) |
| Syracuse, NY | 18.5 (D) | 25.4 (G) | 17.9 (S) | 22.8 (G) |
| 3.Tertiary Markets | 16.5% (G) | 16.5% (S) | 10.4% (G) | 16.5% (G) |
| Baltimore | 16.8 (S) | 16.6 (G) | 10.2 (G) | 17.7 (G) |
| Cleveland | 15.2 (G) | 19.5 (S) | 11.9 (G) | 20.0 (S) |
| Pittsburgh | 15.2 (G) | 18.6 (S) | 19.2 (D) | 20.5 (D) |
| Washington, DC | 16.7 (S) | 17.5 (G) | 10.8 (G) | 15.6 (G) |

*Participation rate noted is for most recent year, 1996. Indicates trend of 1994- 1996: D=Decline; S=Stable; G=Growth; SD=Stable/Decline and SG=Stable/Growth. Source. SRDS. 1994-1996. *Lifestyle Market Analyst.*

Recreation and Sport Activities. Nationally, for three of the four recreational sport activities, household participation rates are declining. They include the activities of tennis, skiing and bicycling. Only golf was growing at the national level. Within all of New England major markets (primary, secondary and tertiary), the rates of participation for tennis and skiing were declining. Golf was declining only slightly and contrary to national rates the participation rate for biking was growing. But, golf, tennis and skiing participation rates were higher than national household participation rates. Overall, the primary market metro areas held rates which were declining for all four activities. Secondary markets were more stable with decline in only tennis; stable for golf and skiing and experienced growth in biking. Growth across all these activities were found in the tertiary markets. Table 2 contains these data.

Outdoor Activities. Nationally, for three of the outdoor activities, household participation rates are growing -- camping/hiking, hunting and fishing. Interest in wildlife and the environment were found to be stable. Within all of New England major markets (primary, secondary and tertiary), the rates of participation for each of these activities were growing with the rate of growth the strongest for fishing. However, the rates for each of the growth activities are significantly below the national rates. The rates are as much as five to seven percent below the national rates. For the primary, secondary and tertiary markets for each of these activities the household participation rates are either stable , slightly growing or growing overall. Only the primary market has experienced a slight decline for interest in wildlife and the environment. Table 3 contains these data.

Table 4. Geographic Markets -- Key Markets for Fitness Activities.

| Geographic Region | Fitness Walking | Fit/Exercise Programs |
|---|---|---|
| National Rates | 34.1% (D)* | 34.1% (D) |
| All New England Mkts | 33.7% (SD | 34.2% (D) |
| 1. Primary Markets | 34.7% (S) | 34.6% (D) |
| Albany | 35.8 (D) | 36.5 (D) |
| Bangor | 36.8 (SG) | 29.0 (D) |
| Boston | 36.8 (G) | 37.2 (D) |
| Hartford/New Haven | 35.1 (SD) | 35.5 (D) |
| New York City Metro | 33.8 (S) | 36.5 (S) |
| Portland/Auburn | 37.5 (SG) | 32.4 (D) |
| Providence/New Bedford | 38.5 (SG) | 33.8 (D) |
| Springfield | 36.1 (S) | 33.4 (D) |
| 2.Secondary Markets | 34.4% (D) | 30.4% (D) |
| Harrisburg, PA | 34.1 (SD) | 31.0 (S) |
| Philadelphia | 34.1 (S) | 35.5 (G) |
| Scranton-Wilkes Barre | 36.1 (D) | 27.6 (G) |
| Syracuse, NY | 34.1 (S) | 34.1 (S) |
| 3.Tertiary Markets | 33.0% (SD) | 36.0% (S) |
| Baltimore | 31.7 (SG) | 35.1 (D) |
| Cleveland | 32.7 (D) | 33.8 (SD) |
| Pittsburgh | 33.3 (SD) | 34.3 (G) |
| Washington, DC | 32.1 (SG) | 40.2 (D) |

*Participation rate noted is for most recent year, 1996. Indicates trend of 1994- 1996: D=Decline; S=Stable; G=Growth; SD=Stable/Decline and SG=Stable/Growth. Source. SRDS. 1994-1996. *Lifestyle Market Analyst.*

Fitness Activities. The rates for fitness walking and participation in fitness and exercise programs/activities were declining at the national level. Within all of New England major markets (primary, secondary and tertiary), interest in fitness walking is declining slightly and fitness and exercise participation is declining more. The primary market for fitness walking is stable and for exercise and fitness participation rates are stable within the tertiary market. All other markets are either declining or declining slightly for these two activities. Table 4 contains these data and comparisons.

Cultural and Historical Activities. Attending cultural activities at the national level is declining and interest in history and America's heritage is increasing. Interest in history within all of new England markets is growing and above the national average. Attending cultural events within New England's major markets is declining slightly but above the national average. Participation is growing over all market areas for interest in history and America's heritage. In only the tertiary market is the household participation for attending cultural events stable. Table 5 contains these data.

Table 5. Geographic Markets -- Key Markets for Attending Cultural Activities and Interest in history and America's Heritage.

| Geographic Region | Attend Cultural Events | Interest in History and America's Heritage |
|---|---|---|
| National Rates | 13.9% (D)* | 4.8% (G) |
| All New England Mkts | 15.8% (SD) | 5.1% (G) |
| 1. Primary Markets | 16.5% (SD) | 4.9% (G) |
| Albany | 14.5 (D) | 5.9 (SG) |
| Bangor | 14.8 (G) | 5.9 (G) |
| Boston | 16.3 (D) | 5.1 (G) |
| Hartford/New Haven | 15.6 (D) | 4.8 (D) |
| New York City Metro | 17.8 (D) | 4.7 (D) |
| Portland/Auburn | 12.6 (D) | 5.6 (G) |
| Providence/New Bedford | 12.8 (D) | 4.8 (G) |
| Springfield | 13.8 (G) | 4.5 (D) |
| 2.Secondary Markets | 13.4% (D) | 5.4% (SG) |
| Harrisburg, PA | 12.1 (D) | 5.9 (D) |
| Philadelphia | 14.5 (D) | 5.3 (G) |
| Scranton-Wilkes Barre | 9.7 (D) | 5.2 (G) |
| Syracuse, NY | 13.6 (SG) | 5.2 (D) |
| 3.Tertiary Markets | 16.0% (S) | 5.6% (G) |
| Baltimore | 15.2 (D) | 5.3 (D) |
| Cleveland | 13.3 (D) | 4.9 (S) |
| Pittsburgh | 13.8 (G) | 5.0 (G) |
| Washington, DC | 19.9 (D) | 6.6 (SG) |

*Participation rate noted is for most recent year, 1996. Indicates trend of 1994- 1996: D=Decline; S=Stable; G=Growth; SD=Stable/Decline and SG=Stable/Growth. Source. SRDS. 1994-1996. *Lifestyle Market Analyst.*

**Conclusions and Implications**

Earlier studies have indicated that New England was a mature travel destination. However, this examination of the data by activities and primary, secondary, and tertiary markets with the potential to travel to New England provide different findings. Market orientation is also helpful in examining the trends within various activities. The early studies examined the Northeast as a total market area. But, there exists considerable variation within the Northeast when activities are examined by the primary, secondary and tertiary markets of New England. Furthermore, even though an activity may show a decline at the national level, activity trends within selected regions can be and are different. Also, regional trends can also vary greatly from the national participation rates.

Examining trends within the Northeast at the subregion or primary/secondary/tertiary level provides clearly different insights about the potential markets for the Northeast. There is variation within these subregions and between these regions and the national rates. When travel participation is examined, for example, participation rates of New England's markets as a whole are declining. However, the secondary market area (including such cities as Philadelphia, Pennsylvania and Syracuse, New York) and tertiary market area (including such cities like Baltimore, Maryland and Washington, DC) are actually growing. In addition, although there is a decline, the participation rates are higher than the national averages.

While the Simmons data are somewhat dated by the time research can be undertaken, the SRDS data are more current. However, even these data suffer from another problem which does not allow a highly accurate picture of the more precise travel indicators to New England provided by the data from Simmons. These data only provide information on whether or not the markets actually traveled and/or participated in various activities by their residential locale. There is no indication in the data that people within these households actually engaged in travel and recreational activities which were undertaken at New England destinations. This is a significant limitation of this data set and analysis. The data merely show the what people are doing specific to their home area. Also, these data are unlike the Simmons and other data sets in that participation is measured at the household level. What is measured here is the residential market demand for activities and <u>not</u> the actual participation in travel and related activities while visiting New England. However, part of marketing is persuading motivated markets to travel to New England. Identifying these markets and trends within the respective markets is essential in the targeting and promotional effort.

The subregional analysis also provides information about how trends may affect regional marketing efforts. For example, if travel within New England's primary market is declining; then, it would seem reasonable to more aggressively pursue those markets within the secondary and tertiary metro areas which are growing.

Within recreational and outdoor markets, even further market savvy may be necessary. On a positive note, the traditional outdoor activities of camping, hiking and fishing are enjoying a rebound within new England's major markets. However, even within these markets, the rates are dramatically below the national rates. Those businesses which seek to attract these traditional activity markets should enjoy rebounding market activity, but also recognize that there are more distant markets (e.g., the South and Midwest) which may have markets with participation rates which are substantially higher than the national averages and the averages for New England's Northeast markets. Recreation businesses and attractions with longer term stay potential may benefit from marketing to these more distant locations.

While variations were noted within the Northeast by primary, secondary and tertiary markets, the variations also extend to intra-regional markets. For example, household participation rates in 1996 for golf vary by as much as eight (8) percent between Albany, New York (household golf participation rate - 22.2%) and Portland, Maine (household golf participation rate -- 14.1%). On the other hand, the household participation rate for hunting for Portland, Maine (28.7%) is over four times higher than the rate for New York City metro area (rate of 6.5%). In other activities, hunting for example, those metro areas closer to more abundant hunting areas (Albany, New York's proximity to upstate New York) and Bangor, Maine's proximity to the Great Northern Woods) all have much higher household participation rates. Albany's participation rate for hunting in 1996 was 16.3% and Bangor's 28.7% in 1996 as compared to the primary region rate of 7.9%.

The impact of a large metropolitan area should also not be overlooked within these findings. The New York City metro area is comprised of over 6.9 million households in 1996. The household density may actually limit participation in some activities such as camping, hiking, hunting and even others like interest in viewing wildlife due to the proximity to the resources and lack of opportunities. The impact of the New York City metro area must be acknowledged in that it comprises 56.4% of the primary market. Due to this size factor, activity trends within this metro area may well mask changes within other metro areas when the primary market is considered in total. For example, New York City metro area has the lowest participation rate for skiing in 1996 of all the major metro areas in the primary market areas. The household participation in 1996 for skiing was 7.8%. However, it comprises 48.4% of all households ski markets within the primary market area and 30.5% of all households throughout the three regions. Portland, Maine's ski participation rate of 14.4% is nearly double that of New York City, but it comprises only 4.5% of the household ski market in New England's primary geographic market in 1996. Attracting skiers from New York metro area may be easier even though the rate is much lower and the distribution of these skiers is likely more dispersed. However, reaching these skiers with advertising messages may be more cost effective because of media can be used in the metro area which has further reach. On the other hand, New York City has the highest household participation rate (7.6%) for tennis in 1996 of all cities within the primary and secondary markets. The New York metro tennis market comprises 64.1% of all primary market tennis households and 38.3% of all three markets for New England. In addition, the New York metro is one area not to over look for travel marketing. Of all the metro areas examined here, it has the highest participation rates for household which travel for vacation purposes -- a rate of 40.6%.

It is also likely that variations in participation are occurring within the New York Metro Area. This is a large area which includes 26 different sub-areas/counties. The New York Metro area extends from Southwestern Connecticut through Central City New York to Northern and Central New Jersey. A quick examination of skiing participation rates in 1994, when the rates were the highest doing this period finds that the household participation rate for skiing in Fairfield County, Connecticut, part of the greater New York metro area, was 14.6% while the rate of participation in Bronx County, New York, also part of the New York metro area, was 3.3%. SRDS data does provide the opportunity to further examine trends within the large metropolitan areas. Sub-metro analysis can be conduct on such cities as Boston, New York, Philadelphia, Baltimore and Washington, DC.

This review of activity markets within geographic proximity of New England gives us new perspectives. The markets in the 90s are changing and evolving. It is clear that a simple examination of national and even regional trends can be misleading and may not provide the total picture for marketing and targeting purposes. Nevertheless, more intense monitoring of travel and recreational activity trends is needed if New England is to continue as a major destination region.

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