NEW ENGLAND'S TRAVEL & TOURISM MARKETS: TRENDS IN THE GEOGRAPHIC TARGET MARKETS IN THE 90'S

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Abstract: The purpose of this paper was to examine the travel and lifestyle activity market trends to New England in the 90s. The central theme was to fully examine in detail the primary, secondary and tertiary geographic markets targeted by New England destinations. Keywords: travel and tourism trends; activity trends; geographic markets; primary, secondary and tertiary geographic markets.

Introduction

The changing age and demographic shifts in the population age structure will one of the most important social phenomena of the 21st century (Kelly and Warnick, 1999). The shifts will have far reaching effects on society in general and in recreation and tourism markets specifically. Many will react to the demographic shifts by devising marketing strategies aimed ever more heavily at Baby Boomers and by diversifying into tourism attractions and programs that have traditionally appeal to middle-aged and older consumers. Each demographic group of people has distinct differences in travel-specific behavior and participation rates. On the other hand, many tourism agencies will focus those market strategies on highly targeted geographic or metro areas. For the geographic target tourism marketers, strategies will include market penetration and grabbing more market share. The different strategies and the approaches taken will depend upon the monitoring of changing trends within both the demographic and geographic markets. Participation rates will shape future demand and the monitoring of rates of participation and behavior and related changes within market areas will help to signal changing cycles and conditions in the tourism and recreation activity industries.

Recent studies (Warnick, 1992A and 1992B, 1993, 1996, 1999) indicated domestic travel in the Northeast and New England had become a mature market and finally showed signs of recovery in the mid-90s. New England, which is easily one of the nation's most definable regions, is a relatively compact region, close to the large megalopolis of east coast cities and a highly desirable geographic market to visit in most consumers' minds. New England's tourism and recreation attraction industry is very well defined and four of the six New England states possess significant tourism-based economies. Thus, careful monitoring of trends in activities by demographic and geographic markets is critical to these tourism-based economies. The 1999 study fully documented the demographic and behavior changes and will form the starting basis of this study, which concludes, with a more detailed examination of the geographic markets targeted by New England's destinations.

Purpose of Study

The purpose of this study is to examine in detail the geographic markets targeted by New England destinations through the lifestyle and geographic profiling of the markets (i.e., the metro markets by geographic area -- the relative distance to New England destinations). The initial study (Warnick, 1996) on geographic markets covered the period only through the mid-90s and this study will update those findings.

Method

In previous studies, two databases were examined in order to more fully understand the travel trends to New England. These data sets included Simmons Market Research Bureau's *Study of Media and Markets* (1980 through 1996) and Standard Rate and Data Service's (SRDS) *Lifestyle Market Analyst* (1993 through 1996). With data now available through 1999, the line of research and trend analysis was updated and expanded through the SRDS data. These data provide activity patterns of geographic markets, which New England destinations would commonly target. For the purposes of this study, several statistic variables were used to describe the trends in these data.

The descriptive statistics used included an average annual adjusted percent change rate and a three-year moving average for the SRDS data. Participation rates and net market of households were used as primary variables to examine the overall trends. The trends analysis of the geographic target markets of New England based destinations, primary, secondary, and tertiary markets, was undertaken and the associated lifestyles within these markets were examined. Primary markets included those target market metro areas within a three-hour drive of the heart of New England (i.e., Boston, New York City). Secondary markets included those target mentor areas within a three to six hour drive of New England (i.e., Philadelphia, Harrisburg). Tertiary markets include those target market metro areas in excess of six hours drive time (i.e., Baltimore, Washington). The metro areas within in each geographic market included: primary market – includes geographic areas of Albany, NY; Bangor, ME; Boston, MA; Burlington, VT; Hartford/New Haven, CT; New York, NY; Portland/Auburn, ME; Providence/New Bedford, RI/MA; and Springfield, MA; secondary market – includes the geographic areas of Philadelphia, PA; Scranton/Wilkes-Barre, PA; Harrisburg, PA; and Syracuse, NY; and tertiary market – includes the geographic markets of Baltimore, MD; Cleveland, OH; Pittsburgh, PA and Washington, DC. When referring to these markets (primary, secondary and tertiary) collectively throughout this study we will refer to them as the Northeast market area. Activity clusters for each geographic market were grouped into travel, recreation and sport, outdoor recreation, fitness and cultural/heritage markets. The travel market lifestyle includes activities of domestic travel (100 miles or more, overnight) and vacation travel. The recreation and sport market lifestyle includes activities of golf, tennis, skiing and bicycling. The outdoor recreation lifestyle includes activities of interest in wildlife and environment, hiking and camping, hunting and shooting, and fishing. The physical fitness lifestyle includes activities of fitness walking or walking for health and fitness programs. The cultural and historic interests lifestyle includes activities of attending cultural/arts events and interests in our nation's heritage. These targeted metro or geographic market areas for New England destinations were examined to determine if changes in these lifestyle interests had occurred from the period of 1995 through 1999. The lifestyle interests within these markets were compared to the overall market area (a within market area analysis, i.e., metro areas within the primary markets were compared for example), to the national market and to the entire region examined (e.g., the primary, secondary and tertiary geographic markets combined or the Northeast market area). Trends were identified on a change scale of strong decline (decline of 2% or more per year); decline (0 to –2% per yr); no growth (at or near 0% per year); stable (positive, but less than 2% per year); growth (2% to 4% per year) and strong growth (>4% per year) during the 1995 through 1999 period. SRDS data is presented as household participation data and they present their information as a three-year moving average. So, data from 1995 is an average of data from 1993, 1994, and the new year 1995 and so on for each new year.

Selected Findings

A detail analysis of the New England destination travelers with tables may be found in the 1999 NERR Proceedings; they provide an overview of who travels to New England and what their activity interests and motivations for travel are. For detailed information and tables see Warnick, 1999. "The New England Travel Market: An Update of Changing Demographic and Geographic Markets, 1980 to 1996." *1999 Proceedings of the Northeast Recreation Research Conference.* Bolton Landing, New York. General Technical Report N-269. Radnor, PA Northeast Forest Experiment Station. pp. 134-140. The findings here reveal what people within the target markets do and how these markets are changing.

Insights into the geographic markets may be obtained by examining the markets which New England destinations target geographically. Here we have grouped the findings into travel markets, sports and recreation, outdoor recreation, fitness activities and interest in cultural and history/heritage events by primary, secondary and tertiary markets of New England.

Travel Lifestyle Activity by Geographic Markets. In the previous studies, travel was found to be declining, although the travel patterns were still higher than the national averages. In this study, the best of both worlds has been realized in travel market activities. Domestic travel has remained stable and vacation travel has increased. Table 1 contains the participation and trend data for travel and vacation travel.

Domestic Travel Lifestyle. New England's primary markets were overall stable for domestic travel. Which metro areas showed the strongest growth trends in travel? Albany, NY; Bangor, Maine; Boston, Massachusetts; and Portland/Auburn, Maine grew at rates exceeding 4% per year. Metro areas with the highest participation rates for travel were Boston and Hartford/New Haven. Both held travel rates of 40.2%, which are above the national and overall regional market rates. New England's secondary market was strong with overall travel rates at about the national rates. Philadelphia and Harrisburg, Pennsylvania were strong growth markets for travel. Scranton-Wilkes Barre, PA, no growth market, and Syracuse, NY, a decline market, were less promising markets for New England. The tertiary markets also exhibited strong growth trends for travel with rates exceeding national rates. Baltimore, Maryland (38.3%) and Washington, DC (40.6%) held the most promise. Washington held the highest participation rate for household travel of all of the markets examined here and held strong growth patterns. This travel includes all types of travel of 100 miles or more away from home. A better indicator for tourism travel is "vacation travel" as collected by SRDS. Rates are typically higher here and although not clear in the data collection process, these data likely reflect more regional based travel, which may not exceed the common "100 miles away from home" criteria often used in travel studies.

Vacation Travel Lifestyle. The national vacation travel market increased in excess of 4% per year by households during this period and the regional participation rate for vacation travel was higher for the Northeast (46.6% of all households participated in vacation travel) than the national rate, which was 45%. Within New England's primary markets, all metro areas held strong growth trends, in excess of 4% per year, with the exception of Providence/New Bedford and Springfield, Massachusetts where the trend changes were less. Boston (49.1%) and New York City (47.3%) held the highest household participation rates for vacation travel in this portion of the total market area. New England's secondary market was strong with overall vacation travel rates slightly above the national rate. Philadelphia and Harrisburg, Pennsylvania were the strongest growth markets for vacation travel in this market area. Scranton-Wilkes Barre, PA and Syracuse, NY were stable market with some growth but less than 2% per year. All of the tertiary market area exhibited strong growth patterns from 1995 through 1999 for vacation travel. Baltimore (46.4%) and Washington, DC (47.3%) were the strongest.

Table 1. Travel patterns for New England destination markets for 1999 with trends for 1995-1999.

	Travel	Travel Trend	Vacation Travel	Vac. Travel Trend
National Rates	37.9%	G	45.0%	SG
All New England Markets	39.0%	S	46.6%	SG
Primary Markets:	39.4%	S	47.1%	SG
Albany	38.3%	SG	45.5%	SG
Bangor	34.1%	SG	41.9%	SG
Boston	40.2%	SG	49.1%	SG
Burlington/Plattsburgh	36.4%	G	41.9%	SG
Hartford/New Haven	40.2%	S	39.5%	SG
New York City Metro	39.8%	S	47.3%	SG
Portland/Auburn	36.4%	SG	42.3%	SG
Providence/New Bedford	37.5%	S	45.0%	G
Springfield	36.0%	S	43.2%	S
Secondary Markets:	37.9%	SG	45.8%	SG
Philadelphia	39.0%	SG	47.3%	SG
Scranton-Wilkes Barre	34.1%	NG	41.4%	S
Harrisburg, PA	36.8%	SG	43.2%	SG
Syracuse, NY	37.5%	D	45.0%	S
Tertiary Markets:	38.8%	SG	46.0%	SG
Baltimore	38.3%	SG	46.4%	SG
Cleveland	39.4%	G	46.4%	SG
Pittsburgh	36.0%	S	43.2%	SG
Washington, DC	40.6%	SG	47.3%	SG

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

Recreation and Sport Lifestyle Market Activity by Geographic Markets. Of these four activities, the activity with the strongest growth during this period was biking. Nearly 21% of all households in the total market area participated and the growth trend exceeded 4% per year. The rate was about equal to the national participation rate for the activity. Tennis enjoyed a rebound in the Northeast market with a strong growth pattern and rates that exceed the national rates for the activity. Household participation rates for tennis were 6.8% nationally and 8.0% for the Northeast regional markets. The rates for skiing exceeded the national rates, but the growth was not as strong as the national trends. Growth in household participation for skiing was up over 4% per year at the national level. Household participation rates for skiing were 8.3% nationally and 9.6% for the Northeast regional markets. Surprisingly, the household rate for golf did not grow as rapidly as in early portions of the decade in the Northeast. Nationally, golf has enjoyed a strong growth trend in the late 90s. Household participation rates for golf were 21.2% nationally and 19.9% for the Northeast regional markets. Recreation and sport lifestyle markets may be found in Table 2.

Golf Lifestyle. The rates were slightly lower than the national participation rates for golf in this region and the trend pattern was only about 2 –4% growth per year. Most all of the markets within this area grew only slightly or were stable. However, substantial variation exists within the metro area for the game of golf. While Albany, NY (23.1%); Boston (22.5%), and Hartford (22.7%) household participation rates were higher than the national average (21.2%) for golf, the trends within these markets were stable to moderate in growth. Other markets, Portland (18%) and Bangor (16.1), Maine had rates below the national and regional rates even though the markets were growing. Overall, the secondary and tertiary markets are more active golf markets with several of these metro markets holding rates in excess of 20% (Syracuse, NY–25.9%; Cleveland, Ohio-26.1%; and Pittsburgh, Pennsylvania-22.9%). However, none of those other areas exceeded growth rates for golf of more than 4% per year. Cleveland and Pittsburgh experience no growth during the 1995 to 1999 period. Still, next to biking, this activity enjoys the highest household participation rates of the four activities examined.

Tennis Lifestyle. Tennis, which has traditionally held strong rates in the Northeast, has indeed rebounded in the last half of the 90s. While the rates have not increased to those of the 70s and early 80s, the trends here indicate strong growth nationally and in the Northeast market areas. The Northeast market metro areas held rates that are higher than the national averages and several are growing at rates exceeding 4% per year. Much of the growth in tennis may be fuel by the New York City metro area with a household participation rate of 9.4% and a strong growth trend exceeding 4% per year. Boston is also a good tennis market with a household rate of 8.4%, but it only experienced moderate growth. Providence/New Bedford (7.1% participate) experienced a strong growth trend for tennis. Hartford/New Haven has a high participation rate, but the growth trend was moderate. Of the secondary markets, Philadelphia has the highest participation rate for tennis (7.7%) while the growth trend is only moderate. Scranton/Wilkes Barre (4.2%) and Syracuse (5.7%) have lower rates but strong growth trends. The strongest tertiary market for tennis is Washington with a strong growth trend pattern and a household participation rate of 9.3%. All other tertiary markets are either stable or moderate growth markets for tennis.

Bicycling Lifestyle. Biking now comes in many different forms; however, across the board in the Northeast all markets are growing and the rates are near or exceed the national averages. All primary, secondary and tertiary markets are growing. Primary metro areas with high bicycling rates include Springfield, Massachusetts and Burlington, Vermont; however, six of the nine areas have rates in excess of 22%. The overall rates in the secondary markets are not as high. Philadelphia (20.2%) and Syracuse (21% are highest here. In the tertiary markets, Washington has the highest rate of 21.6% and Pittsburgh the lowest with only 16% participating.

Table 2. Recreation and sport activity rates for New England destination markets for 1999 with trend of 95-99.

Markets:	Golf	Golf Trend	Tennis	Tennis Trend	Ski	Ski Trend	Bike	Bike Trend
National Rates	21.2%	SG	6.8%	SG	8.3%	SG	20.8%	SG
All NE. Mkts	19.9%	G	8.0%	SG	9.6%	G	20.7%	SG
Primary Markets	18.9%	G	8.6%	G	11.0%	G	21.6%	SG
Albany	23.1%	S	6.5%	G	13.1%	NG	22.0%	SG
Bangor	16.1%	G	4.8%	SG	12.1%	NG	19.3%	SG
Boston	22.5%	G	8.4%	G	14.7%	G	22.7%	SG
Burlington/Plattsburgh	19.3%	S	6.4%	G	20.0%	NG	24.5%	SG
Hartford/New Haven	22.7%	S	8.0%	G	11.0%	NG	20.4%	SG
New York City Metro	17.0%	G	9.4%	SG	9.0%	G	21.2%	SG
Portland/Auburn	18.0%	G	5.8%	G	15.6%	NG	22.3%	SG
Providence/New Bedford	20.4%	G	7.1%	SG	10.4%	G	22.3%	SG
Springfield	21.0%	NG	6.2%	G	10.2%	D	23.1%	SG
Secondary Markets	20.1%	S	6.7%	G	8.1%	G	19.2%	SG
Harrisburg, PA	20.6%	G	5.6%	G	6.4%	G	17.3%	SG
Philadelphia	19.7%	G	7.7%	G	8.3%	G	20.2%	SG
Scranton-Wilkes Barre	17.4%	S	4.2%	SG	7.0%	S	15.2%	SG
Syracuse, NY	25.9%	S	5.7%	SG	10.5%	D	21.0%	SG
Tertiary Markets	21.6%	S	7.5%	SG	7.6%	G	20.0%	SG
Baltimore	18.4%	G	7.8%	SG	7.9%	G	20.2%	SG
Cleveland	26.1%	NG	5.5%	SG	6.0%	G	20.8%	SG
Pittsburgh	22.9%	NG	4.8%	G	6.7%	S	16.0%	SG
Washington, DC	19.1%	G	10.5%	SG	9.3%	SG	21.6%	SG

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

Outdoor Recreation Lifestyle Market Activity by Geographic Markets. Of these four activities (interest in wildlife and the environment, camping/hiking, hunting and fishing), the activity with the strongest growth during this period was fishing. Nearly 29% of all households in the U.S. fish and the growth trend exceeded 4% per year from 1995 to 1999. Both fishing and camping/hiking were strong growth markets in the Northeast from 1995 to 1999, each exceeded a growth rate of 4% per year; however, in both activities the household participation rates were below the national rates. Before one jumps to conclusions on these activities, it was clear that there was wide variability within the metro areas markets in the Northeast. For example, the rates for camping and hiking topped 41.5% in Bangor, Maine and only 15% in the New York City metro area. Similar patterns of wide variability were also found in hunting and fishing. After years of growing interest in wildlife and the environment, the rate of interest both nationally (15.5%) and within the overall Northeast market (15.5%) have declined. However, the decline was less than 2 % per year. For interest in camping and hiking, the Northeast enjoyed strong growth trends with an overall household participation rate of 20.6% compared to the national average of 26.8%. Hunting enjoyed a stable pattern of activity during the 1995 to 1999 period both nationally and in the Northeast. The national rate was 16.6% and in the Northeast 11.3%. Although rates are far below the national participation rates, the stability and moderate growth in selected markets helped to maintain the overall market interest. Although the fishing rates for the overall region held strong growth trends, the household rate for the Northeast (21.3%) is still below the national rate (28.8%). Participation rates and trends for the outdoor recreation activities may be found in Table 3.

Table 3. Outdoor Activity Rates for New England destination markets for 1999 with trend of 95-99.

Markets:	Wildlife	Wildlife_ Trend	Camp/Hike	Camp/Hike_ Trend	Hunt	Hunt Trend	Fish	Fish_ Trend
National Rates	15.5%	D	26.8%	G	16.6%	S	28.8%	SG
All NE. Mkts	15.6%	D	20.6%	SG	11.3%	S	21.3%	SG
Primary Markets	15.9%	SD	19.9%	SG	9.2%	S	19.8%	G
Albany	18.3%	D	30.3%	SG	17.3%	S	25.6%	SG
Bangor	22.6%	S	41.5%	SG	30.9%	S	40.3%	SG
Boston	16.3%	D	24.1%	SG	8.6%	S	19.6%	SG
Burlington/Plattsburgh	21.1%	D	37.8%	SG	26.2%	S	32.3%	SG
Hartford/New Haven	15.7%	D	22.8%	SG	9.8%	S	21.3%	SG
New York City Metro	15.0%	D	15.0%	SG	6.8%	NG	17.3%	SG
Portland/Auburn	20.3%	D	36.7%	D	21.4%	S	31.7%	D
Providence/New Bedford	15.0%	SD	21.2%	SG	8.1%	G	21.0%	SG
Springfield	17.2%	D	26.3%	SG	12.8%	G	23.9%	SG
Secondary Markets	15.9%	SD	21.4%	SG	15.1%	S	23.7%	SG
Harrisburg, PA	16.6%	D	26.0%	SG	22.2%	D	25.6%	SG
Philadelphia	15.0%	SD	18.2%	SG	10.6%	S	21.3%	SG
Scranton-Wilkes Barre	16.9%	S	25.5%	NG	25.7%	D	30.2%	D
Syracuse, NY	19.1%	S	30.3%	SG	18.8%	NG	28.8%	SG
Tertiary Markets	14.7%	SD	21.7%	SG	13.6%	S	22.8%	SG
Baltimore	15.7%	SD	20.1%	SG	11.0%	S	21.0%	SG
Cleveland	14.3%	SD	23.3%	SG	12.6%	NG	24.8%	SG
Pittsburgh	14.3%	SD	22.5%	SG	20.8%	S	25.3%	SG
Washington, DC	14.9%	SD	20.9%	SG	11.5%	S	20.2%	SG

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

Interest in Wildlife & Environment. The household participation rate (15.6%) for interest in the environment and wildlife in the Northeast overall market was about the same rate as the national rate (15.5%); but both nationally and regionally the interest has declined. Nearly all metro areas in the Northeast experienced a decline in interest in this activity (14 of 17 areas declined) with one metro area in the primary (Providence/New Bedford) and secondary (Philadelphia) markets experiencing strong decline of more than 4% per year. All of the tertiary markets experienced the same level of declining interest. Still, all but two metro areas (Providence/New Bedford and New York City) had rates above the regional and national rates for the activity. Scranton-Wilkes Barre and Syracuse were stable markets, but Harrisburg and Philadelphia declined. Three of four tertiary markets held rates that were lower than national or regional averages and all four markets declined strongly, more than 4% per year. While metro markets also do vary substantially and are declining; in 10 of 17 metro areas the rates of interest in wildlife and environment are still above the national rate.

Camping/Hiking Lifestyles. In 14 of the 17 metro areas, strong growth patterns in participation for camping and hiking occurred. Only Portland, Maine (36.7%) and Scranton-Wilkes Barre (25.5%) held decline or no growth trends, but both areas held above average rates during the period. Overall, the primary market area for camping and hiking is in a strong market growth trend. While the small metro areas have higher participation rates, 8 of 9 experienced strong growth. Rates varied widely within the region, too. New York held a 15% rate while Bangor, Maine a 41.5% rate. The secondary market area found one market area with above average participation rates (Syracuse, 30.3%), but three of the four held patterns of strong growth. The rates were lower than the other regional and national averages in all of the tertiary markets, but each market held growth trend patterns above 4% per year.

Hunting Lifestyles. Hunting probably held the most variability of any activity when the metro areas were examined. For example, Bangor, Maine held a participation rate of 30.9% that was stable compared to New York City with a rate of 6.8% and no growth. Overall, the primary market was found to be stable. Six of the metro areas had stable participation rates for hunting. Moderate growth was found in two markets – Providence/New Bedford (8.1%) and Springfield, Massachusetts (12.8%). The New York City metro area experienced no growth during this period. Bangor, Maine (30.9%); Burlington, Vermont (26.2%) and Portland, Maine (21.4%) held the highest participation rates for hunting in the primary market area. In the secondary market area, the overall market trend was stable. However, variation within these markets was also substantial. One market actually grew, Philadelphia, but it held only a 10.6% participation rate. Two markets, Harrisburg (22.2%) and Scranton-Wilkes Barre (25.7%) actually declined, but their rates were twice that of Philadelphia. Syracuse possessed a no growth change pattern. Finally, three of the tertiary markets held a stable trend pattern -- Baltimore (11.0%), Pittsburgh (20.8%) and Washington, DC (11.5%) while Cleveland (12.6%) experienced no change in participation trends for hunting. No metro areas experienced strong growth for hunting during this period.

Fishing Lifestyles. Fifteen of the 17 metro markets held strong growth patterns during the period. In the primary market, nearly all markets held high growth rates for fishing. Only the Portland, Maine market declined. Rates for fishing varied widely in the primary market. Rates were highest in Bangor (40.3%) and Burlington (32.3%) and lowest in Boston (19.6%) and New York City (17.3%). In the secondary markets, the overall trend was strong growth with only Scranton-Wilkes Barre declining in participation rates. Harrisburg (25.6%) and Syracuse (28.8%) exceeded the regional participation rate (21.3%). All of the tertiary markets held strong growth trends for fishing. Pittsburgh (25.3%) had the highest participation rate in this area.

Fitness Lifestyle Market Activity by Geographic Markets. Both of these activities (fitness walking and fitness/exercise programs) maintained stable trends patterns. Nearly 37% of all households in the U.S. engage in fitness walking and 36% participate in a fitness/exercise program in 1999. All of the markets, primary, secondary and tertiary held stable activity interest for both activities. Participation rates varied only slightly between metro areas.

Fitness Walking Lifestyles. In the primary markets, 8 of the 9 markets actually grew; however New York, which held the lowest participation rate of 37.3%, remained stable during the period. In the secondary markets, Syracuse (39.1%) had the highest participation rates and the strongest growth trend. Philadelphia (37.3%) and Harrisburg (37.3%) were growth markets and Scranton-Wilkes Barre (39.1%) was stable. In the tertiary markets, Baltimore (36.5%) and Washington DC (35.8%) grew and Pittsburgh (39.1%) and Cleveland (36.2%) were stable.

Fitness/Exercise Program Lifestyle. Overall, the Northeast (37.8%) market held participation rates higher than the national rate (36.2%) and each of the market areas within the Northeast; the primary, secondary and tertiary; experienced stable patterns of change. Each of the market areas was stable. Within the primary market, both Portland, Maine (35.8%) and Providence/New Bedford (37.3%) were growth markets. All others were stable. Boston (39.8%) held the highest participation rate for fitness programs. In the secondary markets, Harrisburg (33%) and Scranton-Wilkes Barre (29.7%) grew and Philadelphia (37.6%) and Syracuse (34.4%) were stable. Philadelphia held the highest participation rate. In the tertiary markets, all metro areas were stable. Washington, DC (43.4%) held the highest participation rate. Table 4 contains these data.

Cultural Activity and History/Heritage Interest Activity by Geographic Markets. Of these two activities, interest in cultural activities grew the most, but interest in history and heritage experienced moderate growth (less than 2% growth). Nearly 17% of all households in the U.S. showed interest in cultural activities and nearly 6% expressed interest in history and heritage. The rates in the Northeast overall were higher for cultural activities (19.3%). Rates for interest in history and heritage were only slightly lower in the Northeast (5.7%). See Table 4 for these data.

Table 4. Fitness and Cultural/Historic Activities for New England destination markets for 1999 with trend of 95-99.

Markets:	Fitness Walk	Fit Walk Trend	Fit./Exer	Fit/Ex. Trend	Cult. Activity	Cult.Act. Trend	Hist. & Heritage	Hist. Herit. Trd
National Rates	36.9%	S	36.2%	S	16.7%	SG	5.5%	G
All NE Mkts	37.2%	S	37.8%	S	19.3%	SG	5.7%	G
Primary Markets	37.8%	S	38.3%	S	20.3%	SG	5.5%	G
Bangor	42.4%	G	32.2%	S	13.2%	SG	5.9%	SG
Portland/Auburn	41.7%	G	35.8%	G	15.7%	SG	6.3%	SG
Boston	41.0%	G	39.8%	S	20.2%	SG	5.8%	SG
Burlington/Plattsburgh	40.2%	G	35.1%	S	16.2%	SG	6.5%	SG
Albany	40.2%	G	35.1%	S	17.0%	SG	6.4%	G
Springfield	40.2%	G	35.8%	S	16.4%	G	5.2%	G
Hartford/New Haven	39.9%	G	38.4%	S	19.0%	SG	5.3%	G
Providence/New Bedford	42.8%	G	37.3%	G	16.9%	SG	5.0%	S
New York City Metro	37.3%	S	38.7%	S	21.7%	SG	5.4%	G
Secondary Markets	36.9%	S	35.7%	S	16.4%	SG	5.8%	G
Harrisburg, PA	37.3%	G	33.0%	G	14.9%	SG	6.4%	G
Philadelphia	37.3%	G	37.6%	S	17.9%	SG	5.7%	G
Scranton-Wilkes Barre	39.1%	S	29.7%	G	11.7%	SG	5.5%	S
Syracuse, NY	39.2%	SG	34.4%	S	16.0%	SG	5.8%	G
Tertiary Markets	35.9%	S	38.2%	S	19.2%	SG	6.0%	G
Baltimore	36.5%	G	37.3%	S	19.4%	SG	6.2%	SG
Washington, DC	35.8%	G	43.4%	S	23.5%	SG	7.0%	G
Pittsburgh	39.1%	S	33.7%	S	15.9%	SG	5.3%	G
Cleveland	36.2%	S	35.8%	S	16.0%	SG	5.1%	S

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

Cultural Activity Lifestyles. In the primary markets, 8 of the 9 markets actually grew more than 4% per year (strong growth) for cultural activity interest. Interest was strongest in Boston (20.2%) and New York City (21.7%). Strong growth of more than 4% was also experienced in all of the secondary and tertiary markets for cultural activities. Rates were highest in Philadelphia (17.9%) and Syracuse (16%). In the other markets, Washington, DC (23.5%) and Baltimore (19.4%) held the highest interest in cultural activities.

History and Heritage Interest Lifestyle. In the primary market, four areas, Bangor, Portland, Boston and Burlington all experienced strong growth trends. Philadelphia and Harrisburg were growth markets and Scranton-Wilkes Barre was stable. In the tertiary markets, Baltimore and Washington DC grew and Pittsburgh and Cleveland were stable.

Conclusions and Implications

Earlier studies indicated that the New England travel markets had rebounded in the mid- to late 90s. However, the areas targeted by New England destinations revealed further trends in the market. The SRDS *Lifestyle Market Analyst* provides an excellent source of secondary data about these markets. In this study, we were able to group New England's markets into primary, secondary and tertiary areas. Findings from these markets provide additional insights into the markets and trends within them.

The Simmons data, which formed the baseline data about New England destination travelers, are usually dated and do not provide a representative sampling of the typical metro areas targeted by tourism destinations. However, advancements in the data did provide opportunities for more directed analysis of the New England destination travelers. The SRDS data provide current up-to-date market data on regional metro areas throughout the Northeast. The data are current and because yearly data are provided, trend analysis is possible. The data are usually inexpensive and readily available at major university libraries.

Data collected and analyzed here provide information on grow, stable and decline activities. We found that travel, and particularly vacation traveled had in fact increased. Broad cross sections of activities were examined by three major market areas. In these markets, we attempted to determine where the active tourism markets resided, and what do they do? How large is the market and what is the trend in the market area?

Some interesting new findings were documented in this study. For the travel markets, the target areas were stable for domestic travel, but vacation travel had strong growth patterns. Tennis and bicycling held strong growth patterns in the focused market areas. Golf continued to grow, but a slightly slower pace. Downhill skiing enjoyed a higher than national participation rate in the primary markets and the markets did continue to grow moderately. For outdoor recreation, we found surprisingly that interest in the environment and wildlife had declined across all markets while interest in camping, hiking and fishing held strong growth pattern changes. Furthermore, variability in these activities and markets offered widely different market conditions. The fitness markets were stable and interest in cultural activities and interest in history and cultural activities continued to grow in interest.

However, one should note that the information collected through the SRDS data do not indicate if these markets either have or actually will travel to New England. The link to activity participation and travel is only an association. There are no links in the data to actually know where the households traveled only that they did take domestic or vacation travel trips in the last year. One would expect that the associations are strong. People who travel on vacation are likely to go on trips, which are within a reasonable distance from home. While there may be a likelihood that a portion of this travel was to New England, one cannot be conclusive on this assumption. This is a significant limitation to these data although this is overcome in the Simmons data. Furthermore, data in the SRDS only highlight the number of households and participation rates and do not address the volume of participation or actual number of trips taken.

The insights from taking the two data sets together and examining the results provide us even more thorough understanding of the New England travel market. For example, we know that the New England destination traveler is a highly active outdoors type and a large portion of the New England destination travelers are individuals who travel frequently. We now know that over 40% of all New England based travelers take four or more trips per year. Furthermore, we now know that travel to New England is much more disbursed than one might be perceived. For example from Simmons we found that 41% of the New England destinations travelers take trips in May through August and another 17% come during the fall foliage season – September and October. When these findings are combined with a look at the target markets regions – primary, secondary and tertiary, we more fully understand where the markets may actually exist. We know that the vacation travel market is strong and that the primary markets have the highest participation rates. Furthermore we know that 8 of 10 metro markets in the primary target region are going at rates greater than 4% per year. Knowing that New England based travelers participate at levels well above national participation rates for selected sport and outdoor recreation activities, we can also target these markets.

In other activities, it was clear that some markets are changing and great differences exist between major metro areas and smaller areas. For example, we found that interest in the environment and wildlife had slowed over the last half of the decade. On the other hand, other significant differences existed. For example, in hunting and fishing, household participation rates in Bangor, Maine (the rate for hunting was 30.9% and for fishing 40.3%) were more than twice the rate of the New York City metro area (hunting rate – 6.8% and fishing rate – 17.3%).

Within recreation, travel, sport and cultural activity markets more insights were gained by examining the geographic markets where people live. New England destination travelers are from active households. This research tells both where they are likely to come from but also if those same markets are growing, are stable or are declining within these lifestyle pursuits. This review of New England destination travelers and their respective markets further enhances our understanding of the market potential of the Northeast and opportunity to attract those potential travelers. We also see that the markets are changing. A simple review of national and even regional trends and activity patterns can be misleading unless one examines carefully each of the individual markets. These markets are dynamic, some drastically different and ever changing. This monitoring of trends and activities by markets will continue to be necessary if New England is to maintain its status as a major destination tourism region.

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