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NERCRD Factsheet

Allegheny National Forest Tourism Surveys: Overview of Findings

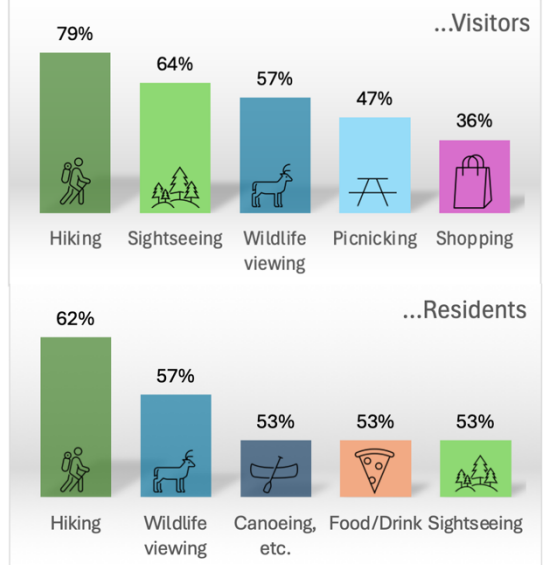
The Northeast Regional Center for Rural Development helped bring together a team of researchers and educators from Penn State University and West Virginia University with local community leaders to survey residents of and visitors to the Allegheny National Forest (ANF) Region about their opinions and preferences regarding tourism in the region. The region includes Warren, Elk, McKean, Forest and Cameron counties and visitors from the main target markets of Erie, Pittsburgh and Philadelphia, PA; Buffalo, Rochester and New York City, NY; and Cleveland and Columbus, OH.

Nearly two-thirds (63%) of **visitors** stayed overnight, while 37% were day trippers. One quarter of overnight visitors camped while 23% stayed in a hotel and 21% stayed with friends/relatives. One in five visitors stayed in an Airbnb. About three-quarters of the visitors were between 18-44 years of age. Most (75%) reported an annual household income of less than \$100,000 before taxes. One-half were visiting for the first time while 42% had visited between two and five times. Most traveled in pairs or in groups of three to five people (about 42% each). Forty-six percent of visitors spent \$300 or less in group spending/trip. More than half (54%) of the visitors listed McKean County as their destination, followed by Warren (45%). The top activities mentioned by visitors and residents are shown in the adjacent graphic.

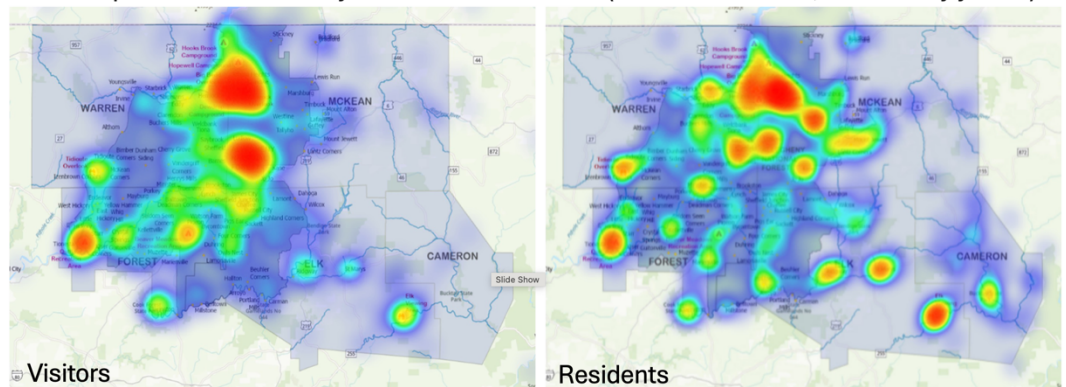
Three-quarters of the local **residents** surveyed were 45 years of age or older. About 15% had some role in the local tourism economy, and two-thirds had visited another county in the ANF Region ten times or more within the last year for leisure purposes: McKean (mentioned by 46%), Elk (41%), Forest (38%), Warren (34%), and Cameron (22%). Kinzua Bridge State Park, Kinzua Dam, Allegheny River, Elk County Visitor Center, Rim Rock, and Jake's Rock Trails are the most-visited places. Visitation patterns are shown in the heat maps below.

Visitors and residents were asked which factors or indicators are most important to measure when considering the sustainability of tourism in a given area. This information reveals which local assets residents value most, and it can also be used to identify areas most in need of improvement. **Residents** ranked environmental factors as being most important. However, they were also concerned about socio-economic indicators, notably the improvement of the well-being of rural communities through tourism, and institutional indicators such as local leaders' support of tourism development. **Visitors** also ranked environmental quality, protection of the natural environment and waste management as being important but thought local leaders' support of tourism development or local economic opportunities from tourism development were less important.

Activities participated in by...



Heat maps for areas visited by Visitors and Residents (red is most visited, followed by yellow)



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Visitors and residents were also asked how well they thought the ANF region performed on the same indicators.

Visitors thought ANF Region performed well on environmental indicators (including rural authenticity) but poorly on economic indicators such as investment in tourism development, career opportunities in tourism, and high-paying jobs from tourism development. Similarly, **residents** felt the region performed well on environmental indicators but poorly on economic

indicators such as investment in tourism development, career opportunities in tourism, and high-paying jobs from tourism development. These findings suggest that the challenge for the ANF region, and many other areas, is to improve the well-being of communities through tourism, secure local leaders' support for tourism development, create more economic opportunities from tourism development, invest in tourism development, and develop systems to monitor and manage the impacts of tourism over time. *Residents felt strongly that long-term planning and managed growth are important to control any negative impacts of tourism*, that tourism development will provide more local economic opportunities, that the area should invest in tourism development and do more to promote its tourism assets to visitors.

Visitors indicated that the ANF region performed *somewhat better* than similar destinations in terms of prices, level of crowding, outdoor recreation opportunities, rural authenticity, and hospitality and friendliness of local residents, while **residents** thought that the ANF region performed slightly better than similar destinations they had visited on level of crowding, rural tranquility and authenticity, and outdoor recreation opportunities. The adjacent word cloud shows what attributes residents think of the most when considering the desirability of the ANF Region. Positive experiences identified by visitors included scenery and nature, outdoor recreation opportunities, and rural character while residents identified natural resources, recreational activities, and business and economic development as regional strengths. Negative experiences were related to crowding, weather/insects, roads/accessibility, littering, and food/lodging while residents reported lack of infrastructure, organizational and community leadership as regional weaknesses. *According to visitors, opportunities to increase competitiveness included advertising more, developing more attractions, maintaining authenticity, and more amenities and lodging while residents identified improved marketing and infrastructure and increased amenities, activities and lodging.*

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METHODS: A survey of visitors to the Allegheny National Forest region of Pennsylvania was conducted in March, 2024 using the Prolific online survey platform. 560 valid responses were retained for further analysis. A corresponding survey was developed for residents of the five-county region that surrounds the area of the Allegheny National Forest in Pennsylvania including Warren, Elk, McKean, Forest, and Cameron counties. The survey is still open, and this preliminary report includes surveys collected through September 18, 2024, from 339 participants resulting in 235 valid responses. A parallel survey was administered in 2023 to visitors to the region. **The resident survey results should be interpreted with caution due to the small sample size obtained to date;** for the full reports and related resources, please see: <https://nercrd.psu.edu/tourism-research-in-allegheny-national-forest/>

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Ranking of Top 10 Tourism Indicators by Residents and Visitors (1=highest importance)

Indicator	Residents	Visitors
Environmental Quality (water, air, resources, etc.)	1	2
Protection of the Natural Environment	2	1
Improvement of Well-being of Community from Tourism	3	12
Management of Waste	4	3
Local Leaders' support of Tourism Development	5	24
Control of Negative Impacts through long-term Planning	6	6
Guidelines for Visitor Behavior at Culturally sensitive Sites	7	5
Local Economic Opportunities from Tourism Development	8	23
Quality of Public-Private Partnerships for Tourism	9	25
Rural Authenticity	10	15

Words describing the ANF region as a tourism destination...

