



Northeast Regional Center  
for Rural Development



**PennState**  
College of Agricultural Sciences



TEXAS A&M UNIVERSITY  
Hospitality, Hotel  
Management & Tourism

# Residents' Perceptions of and Attitudes towards Tourism in the Allegheny National Forest Region:

*Preliminary: For Review and Discussion Only; not for Distribution*

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## Executive Summary

This document presents survey responses provided by residents of the five counties in Pennsylvania contained in the Allegheny National Forest (ANF) region. The results are preliminary in that additional survey responses are expected over the course of the 2024 fall and winter seasons. Nevertheless, the results presented here provide general early indications of community residents' perceptions and participation in tourism and recreation activities, to be used in discussions with local tourism organizations and community leadership.

Local residents who had visited one or more of the other four counties in the ANF area for recreational purposes mentioned McKean County most frequently. The Kinzua Bridge State Park, Kinzua Dam and Allegheny River were the most visited places, followed by the Elk County visitor center in Benezette Township. These responses are confirmed in the heatmap location analysis. Hiking, wildlife viewing, and canoeing/kayaking along with food and drink experiences were the most frequent activities during the visit.

Most resident-visitors from within the region (three-quarters) spent less than \$200 during their most recent trip. Slightly more than a quarter stayed overnight, with three nights being the most common, while just over 7% spent at least 10 nights. Overnight camping or tenting was the most popular, followed by use of an RV.

“Environmental quality” (air, water, other resources), “protection of the natural environment,” and “improvement of the well-being of rural communities from tourism development” were ranked as the most important indicators of tourism sustainability in the ANF region. “Waste management,” “local leaders’ support for tourism development,” and “control of negative impacts through long-term planning” were also highly ranked. Two other important indicators were that “guidelines for visitor behavior at sensitive sites and cultural events were provided to visitors,” and that “economic opportunities (would be) provided from tourism development.” “Quality of public-private partnerships in tourism” and “rural authenticity” also ranked highly as sustainability indicators.

Comparing residents' perceptions of the importance of indicators with how well these indicators are currently perceived to perform reveals where the community needs to “keep up the good work” or “concentrate efforts.” Residents felt best about “environmental quality,” in that this was important to them and the community was also performing well on this indicator. “Protection of the natural environment,” “management of waste,” “control of negative impacts through long-term planning,” “quality of public-private partnerships in planning,” “rural authenticity” and “having a risk reduction, crisis management and emergency response plan” were also areas for “keeping up the good work.”

Areas needing attention were “improvement of well-being of rural communities”; “local leaders’ support for tourism development”; “guidelines for visitor behavior at sensitive sites and cultural events”; and “contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors and the public.” “Economic opportunities from tourism development” and “career opportunities and training in tourism” were also rated as important but currently low-performing and in need of improvement.

Local resident attitudes towards recreation and tourism were also evaluated. The strongest agreement was with the statement that “long-term planning and managed growth are important to control any negative impacts of tourism,” followed by “tourism development will provide more economic opportunities for the area,” and “the area should invest in tourism development.” The strongest disagreement was with respect to the statement that “an increase in tourism will lead to unacceptable amounts of traffic, crime and pollution.”

In terms of competitiveness with other tourism areas they had visited, resident-respondents felt strongly that the “level of crowding” in the ANF was better than that in competing destination, followed by “outdoor recreation opportunities,” and “rural tranquility and authenticity.” Two areas in which the ANF compared less favorably with the reference destination were “shopping” and “entertainment and nightlife.”

While a few respondents had strong reservations about developing the region to increase tourism and recreation in the area, many saw both a need and opportunity for developing the sector to support local incomes and economic development more broadly. There is a clear recognition among those responding that investments in tourism and recreation are needed, but also that safeguards need to be in place to avoid the problems associated with “overtourism.” Respondents also indicated that there is a lack of current leadership capacity in this regard, and that a strategic and coordinated approach to destination management is important to ensure a stable and sustainable form of tourism development with benefits accruing to a broad segment of the local population.

# Preliminary Survey Results

## 1. Introduction

This Report presents the results of a survey of residents in the Alleghany National Forest (ANF) area conducted by Penn State University and West Virginia University faculty and staff, in collaboration with the Northeast Regional Center for Rural Development. The Report accompanies a similar document summarizing the results of a survey of visitors to the ANF area (Deng, Arbogast, Zhuang and Goetz, 2024), which also provides more context for the study. Like the visitor survey, this survey of local residents in the five-county region that is home to the ANF was administered starting in the Spring of 2024. With retrospective questions, it allows comparisons to be made to the before, during and after Covid-19 pandemic periods. As elaborated below, the survey was designed to elicit sociodemographic background information on respondents, current tourism and recreation-related activities pursued, residents' perceptions of and attitudes towards such activities, and basic information about other tourism destinations these residents have visited, as well as their sense of how "competitive" the ANF area is compared to those other destinations. The Report is organized as follows: the first section describes the Methods, followed by the detailed Results, including an assessment of various tourism sustainability performance indicators and the final section presents a conclusion.

## 2. Methods

### 2.1 Questionnaire

A questionnaire was designed and administered to elicit the opinions and attitudes of residents in the Alleghany National Forest (ANF) area about tourism and recreational activities in the region, following a thorough review of the relevant literature and with input from the research team. External reviewers including tourism leaders in the targeted destinations were then invited to comment on the survey. The resulting questionnaire consisted of eight sections: 1) background information, 2) leisure, vacation, and recreation activities, 3) perceptions of tourism sustainability indicators, including their importance and performance, 4) attitudes toward recreation/tourism, 5) perceptions of relative competitiveness of the ANF area relative to other destinations, and 6) socio-demographic variables. The questionnaire was reviewed and approved by the West Virginia University Institutional Review Board (2211673418).

### 2.2 Data Collection and Analysis

The questionnaire for this study was built in Qualtrics, an online survey platform. The target study area was predetermined as the five-county region that contains or surrounds the area of the ANF in Pennsylvania: Cameron, Forest, Elk, McKean, and Warren. The survey was distributed to prospective

participants through stakeholder and community channels (e.g., social media groups, flyers, newsletters), whereby initial screening questions filtered in only participants who resided within these identified counties.

The survey opened and began accepting responses on May 2, 2024, and it is still open as of this writing; therefore, the results presented here should be viewed as preliminary and subject to change as more responses are received and included in the analysis. This preliminary report includes surveys collected through September 18, 2024, from 339 participants. Of this number, 86 had to be removed due to systematically incomplete responses, resulting in 235 valid responses (69.3%) for further analysis. This report presents descriptive findings; a future study will include regression analysis of the data to generate additional insights.

It should be noted with these preliminary results that the percentages from each county should not be used as representative of the entire county populations, as they do not necessarily reflect the actual distributions of county populations.<sup>1</sup>

### 3. Results

#### 3.1 Demographics of Resident Respondents

Of the 235 valid responses, well over one-half were females (57.1%) while males accounted for 39.1%. A small percent of respondents identified themselves as non-binary (1%) while 2.9% preferred not to say (Figure 1).

Most respondents were in the 45 to 65+ years of age range, accounting for about three-quarters of the total (17.1 % for age 45-54, 27.6% for age 55-64, and 29.5% for age 65 and older) (Figure 2). A small percentage of respondents (1.9 %) were between 18 and 24

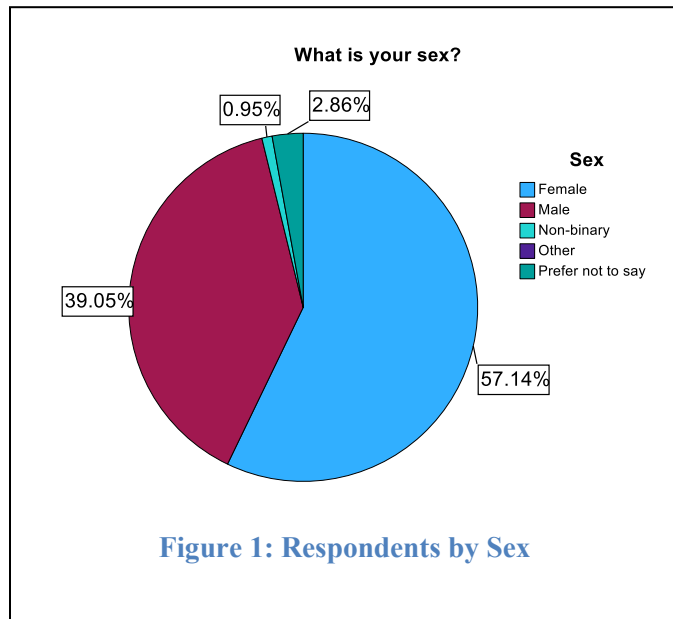


Figure 1: Respondents by Sex

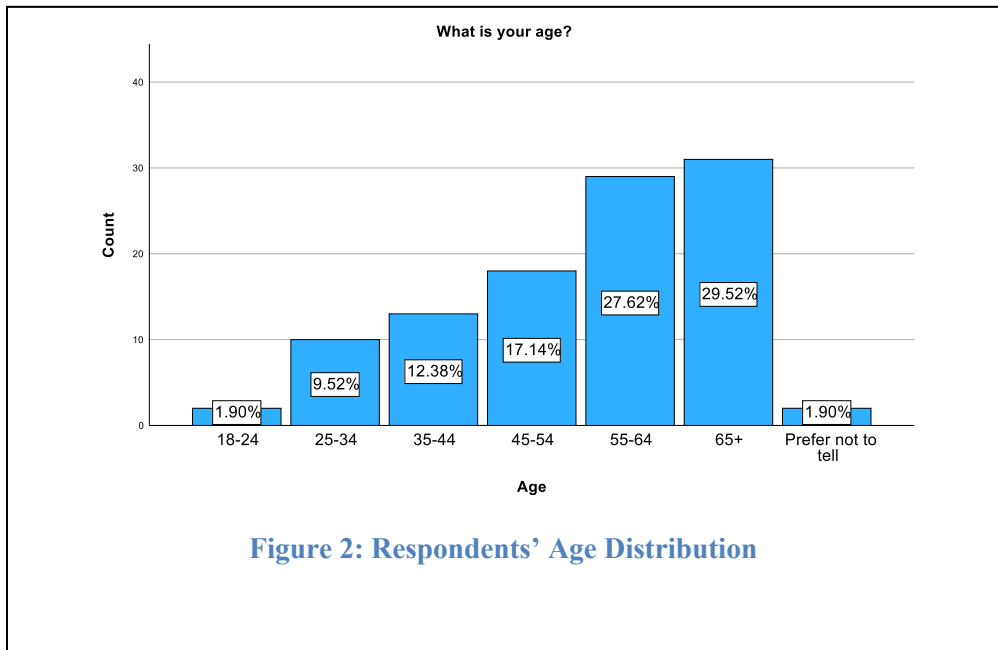
<sup>1</sup> For example, the survey responses reflect an under-sampling of Cameron County and an over-sampling of McKean County, while the percentages for the remaining counties are relatively proportional to actual 2024 populations.



years old. Those between the ages of 25 to 44 accounted for 21.9% of respondents. In addition, 1.9% of respondents preferred not to record their age.

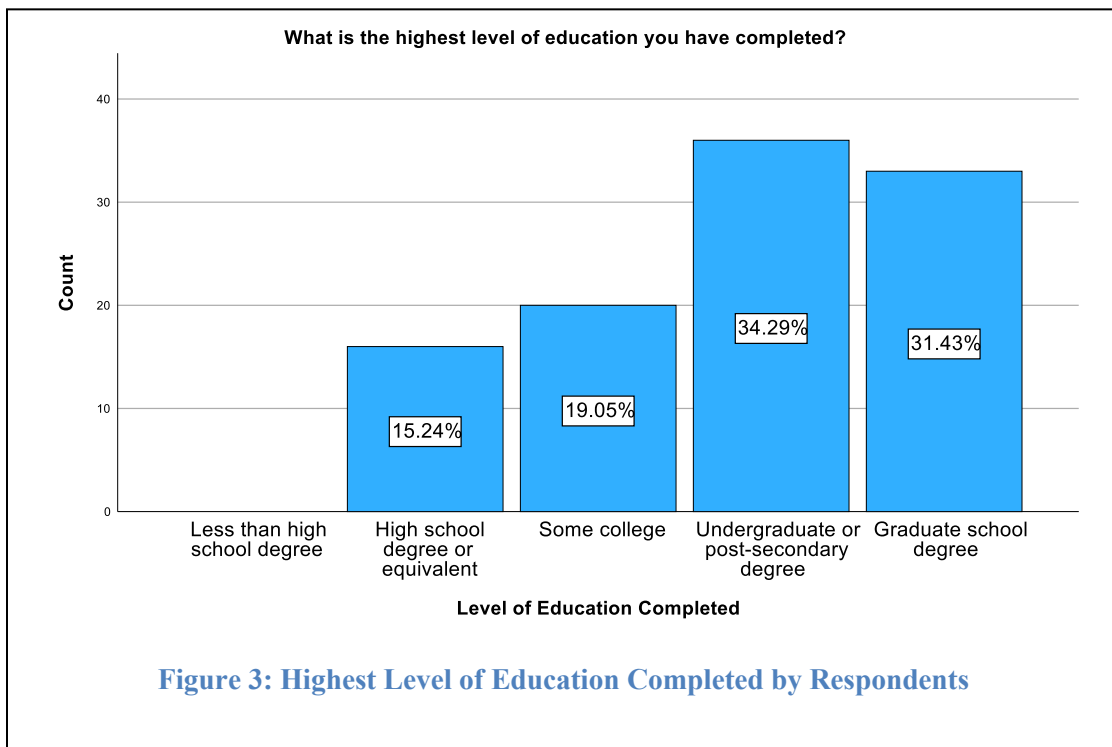
Figures 3 and 4 show respondents' characteristics in terms of education and income, respectively. Most respondents are well-educated, and many are affluent.

Specifically, most respondents had some level of college education:



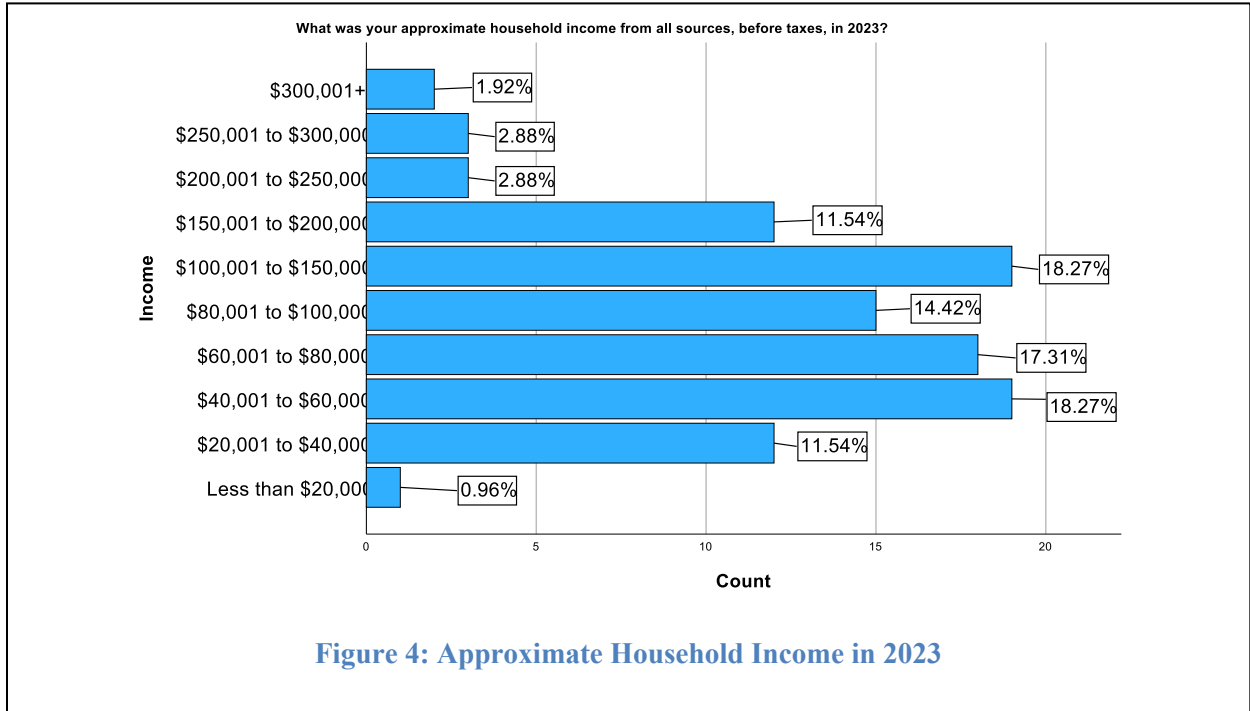
**Figure 2: Respondents' Age Distribution**

19.1% had attended some college, 34.3% held an undergraduate or postsecondary degree, and 31.4% held a graduate school degree. In addition, 15.2% had a high school degree or equivalent. None of the respondents reported having less than a high school degree or equivalent.



**Figure 3: Highest Level of Education Completed by Respondents**

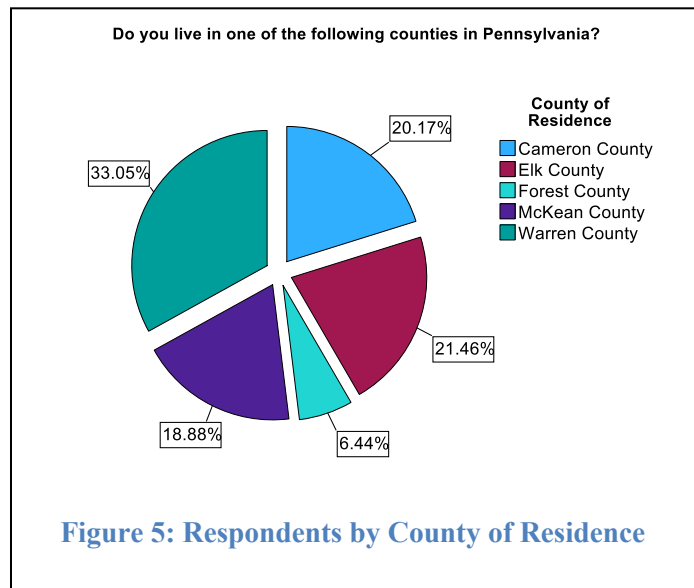
Over sixty percent of respondents (62.5%) reported a household income before taxes of below \$100,000. The remainder of 37.5% reported an income of at least \$100,001, with just under 2% reporting an annual household income before taxes of over \$300,000.



### 3.2 Other Respondent Characteristics

#### 3.2.1. Respondents' Counties

Figure 5 shows the distribution of counties of residence reported by survey respondents. Two of the five counties within the study area, Warren and Elk, combined accounted for over half the respondents (54.5%), with one-third being from Warren County and 21.5% from Elk County. Cameron and McKean counties together made up 39.1% of respondents, followed by Forest County (6.4%). As indicated above, the percentages from each county should not be used as



representative of the entire county populations, as they do not necessarily reflect the actual distributions of county populations.<sup>2</sup>

### 3.2.2. Community Role

Table 1 presents the roles that respondents perform and/or identify with within their communities. Respondents were asked to select all that apply, which is reflected in the percent of cases reporting. Of the reported community roles, nearly three-quarters (73.1%) of respondents reported being “residents” of the county. This was followed by the next-largest response “non-recreation/tourism related employment” (16.3%), “recreation/tourism related local or county board” (13.5%), “government official” (9.6%), “non-recreation/tourism related local or county board” 6.7%) and “recreation or tourism related business owner” and “non-recreation/tourism related business owner.” A small percentage (3.8%) reported that they were “employed by recreation/tourism.” Additionally, 12.5% of cases reported respondent roles within the community as “Other.”

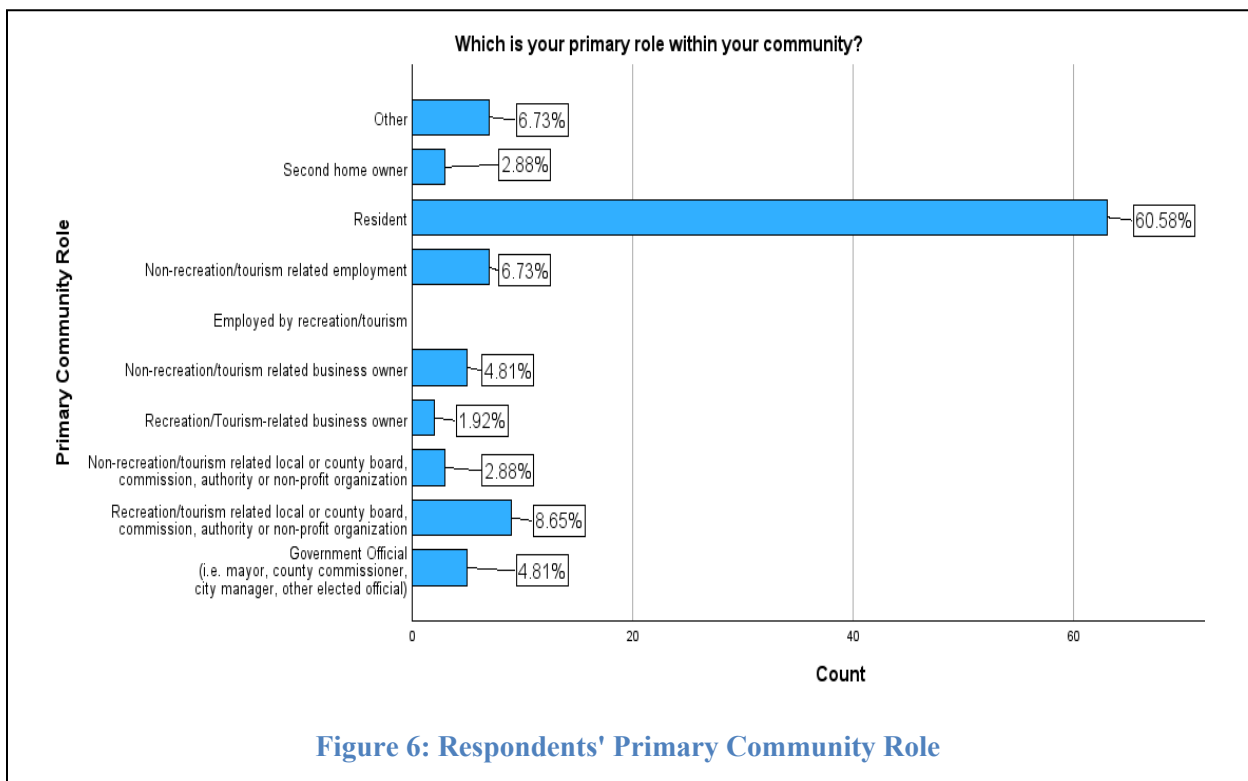
**Table 1: Role in Community (Multiple Responses Allowed)**

	Responses		Percent of Cases
	N	Percent	
Resident	76	46.9%	73.1%
Non-recreation/tourism related employment	17	10.5%	16.3%
Recreation/tourism related local or county board	14	8.6%	13.5%
Other (please specify)	13	8.0%	12.5%
Government Official	10	6.2%	9.6%
Second homeowner	7	4.3%	6.7%
Non-recreation/tourism related local or county board	7	4.3%	6.7%
Recreation/Tourism-related business owner	7	4.3%	6.7%
Non-recreation/tourism related business owner	7	4.3%	6.7%
Employed by recreation/tourism	4	2.5%	3.8%
<b>Total</b>	<b>162</b>	<b>100.0%</b>	<b>155.8%</b>

Note: The 162 respondents on average listed 1.56 roles in the community (155.8/100). "Percent of responses": Calculated by dividing the number of times an answer option was selected by the total number of responses to that question across all participants, regardless of whether they selected other options as well. This shows which answer option was most frequently chosen overall, especially for multiple response questions where individuals can select multiple answers. "Percent of cases": Reflects the proportion of participants in the dataset who chose a particular answer option, considering each participant only once. This shows what proportion of the sample selected a specific answer option, considering each participant only once. For example, “Government Official” represented 6.2% of all responses given; 9.6% of respondents indicated that they were “Government Officials.”

<sup>2</sup> This may change as more survey responses are received and incorporated.

Respondents were further asked to report which of the community roles they identified with they considered to be their primary role within the community, results of which are shown in Figure 6. Aligning with the results in Table 1, “resident” was the most commonly reported primary community role (60.6%). The next highest primary community role reported was “Recreation/tourism related local or county board” (8.7%), followed by “non-recreation/tourism related employment” (6.7%), “non-recreation/tourism related business owner” (4.8%), and “government official” (4.8%). “Non-recreation/tourism related local or county board” and “second homeowner” “recreation/tourism related business owner” and those “employed by recreation/tourism” were least likely to be identified as primary community roles of respondents. In fact, not a single respondent indicated that his or her primary role was that of being employed in recreation or tourism. A small share (6.73%) of respondents reported that their primary community role was “other.”

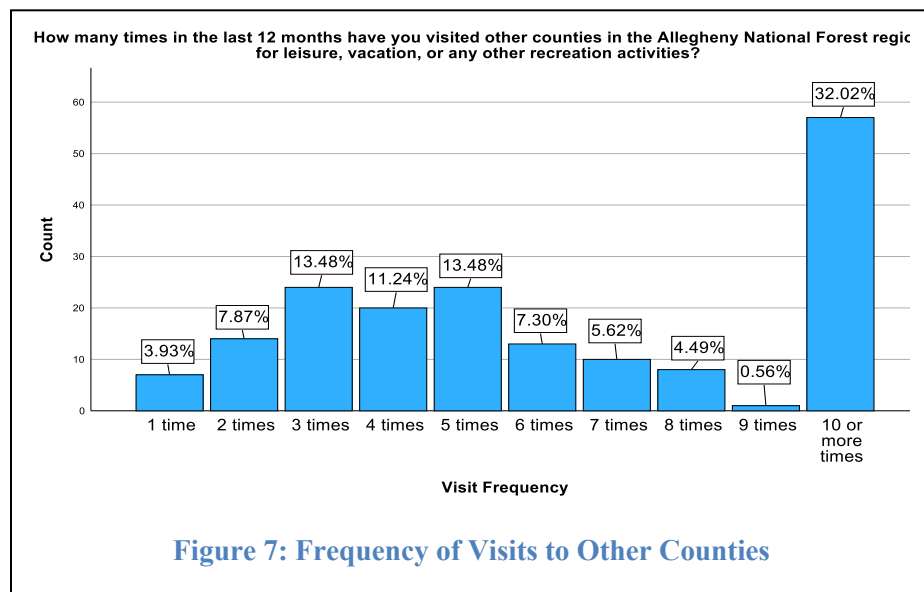


### 3.2.3. Places Visited

Table 2 presents counties that respondents visited for leisure during their most recent trips to or within the ANF area, outside of the county that they reside in. McKean County was the most visited for leisure by residents in the region (46.1%), followed closely by Elk County (41.1%). Forest, Warren and Cameron Counties were mentioned less frequently for leisure-related visits. Additionally, one-quarter (23.7%) of respondents reported that they had not travelled to any county outside of their county of residence for leisure purposes.

	Responses		Percent of Cases
	N	Percent	
McKean County	107	22.5%	46.1%
Elk County	96	20.2%	41.4%
Forest County	88	18.5%	37.9%
Warren County	79	16.6%	34.1%
I have not visited other counties for leisure, vacation, or other recreation activities	55	11.6%	23.7%
Cameron County	51	10.7%	22.0%
I do not live in one of the counties listed above	0	0.0%	0.0%
<b>Total</b>	<b>476</b>	<b>100.0%</b>	<b>205.2%</b>

Figure 7 shows the frequency of visits to other counties for leisure (within the past 12 months) for those respondents who reported leisure trips to other counties (Table 2). Nearly one-third (32.0%) reported taking leisure trips to other counties 10 or more times in the last year. Over half had taken leisure trips to other counties 2 to 6 times within the past 12 months with three and five times being reported with slightly higher frequencies (13.5%).



Respondents were then asked to report whether they had visited certain attractions within the region, the results of which are presented in Table 3. The Kinzua Bridge State Park Visitor Center and Sky Walk (McKean), Kinzua Dam (Warren & McKean), and Allegheny River were the three most visited

**Table 3: Places visited for leisure in the ANF Region**

	Responses		Percent of Cases
	N	Percent	
Kinzua Bridge State Park Visitor Center and Sky Walk (McKean)	121	12.6%	69.1%
Kinzua Dam (Warren & McKean)	116	12.0%	66.3%
Allegheny River	110	11.4%	62.9%
Elk Country Visitor Center (Benezette Township)	88	9.1%	50.3%
Rim Rock	73	7.6%	41.7%
Trails at Jake's Rock (Warren)	71	7.4%	40.6%
Winslow Hill	60	6.2%	34.3%
Straub Brewery (Elk County)	60	6.2%	34.3%
Others (Please specify)	48	5.0%	27.4%
Ridge Road (Cameron County)	45	4.7%	25.7%
Zippo/Case Museum (McKean County)	43	4.5%	24.6%
Clarion River Water Trail (Elk)	38	3.9%	21.7%
Sinnemahoning Canyon Vista	27	2.8%	15.4%
The Fred Woods Trail (Cameron County)	27	2.8%	15.4%
Twisted Vine Beverage	15	1.6%	8.6%
Eldred World War II Museum	12	1.2%	6.9%
Table Falls	10	1.0%	5.7%
<b>Total</b>	<b>964</b>	<b>100.0%</b>	<b>550.9%</b>

attractions by residents (69.1%, 66.3%, and 62.9%, respectively). The Elk County Visitor Center (Benezette Township), Rim Rock, and the Trails at Jake’s Rock (Warren) were the next most frequently visited attractions in the region, followed by Straub Brewery in Elk County (by over one-third, or 34.3%), Winslow Hill, Ridge Road (Cameron County), the Zippo/Case Museum (McKean County), Clarion River Water Trail, the Fred Woods Trail, Sinnemahoning Canyon Vista, Twisted Vine Beverage, Eldred World War II Museum, and Table Falls. Lastly, 27.4% of respondents reported having visited other attractions not listed. Local residents are more likely to be aware of the locations of regional attractions than visitors from outside the region (who may benefit, for example, from more road signage directing them to these attractions).

Respondents were provided with an interactive digital map of the ANF region and asked to click on the approximately locations of the places they had visited during their most recent trip to the area (with a maximum 10 clicks). Figure 8 shows using a heat map the two most popular subregions as determined by the frequency of clicks. Table 4 reports the percentages of clicks by each county-bounded region: McKean not surprisingly had the highest frequency of clicks at 85.0%, followed by Warren at 72.1% and Elk at 57.8%. Forest County received one-half (50.3%) of click cases, while Cameron accounted for only 21.1% of cases

**Table 4: Heat Map Region (County) Selection Frequency**

	Responses		Percent of Cases
	N	Percent	
McKean County	125	29.7%	85.0%
Warren County	106	25.2%	72.1%
Elk County	85	20.2%	57.8%
Forest	74	17.6%	50.3%
Cameron County	31	7.4%	21.1%
Total	421	100.0%	286.4%

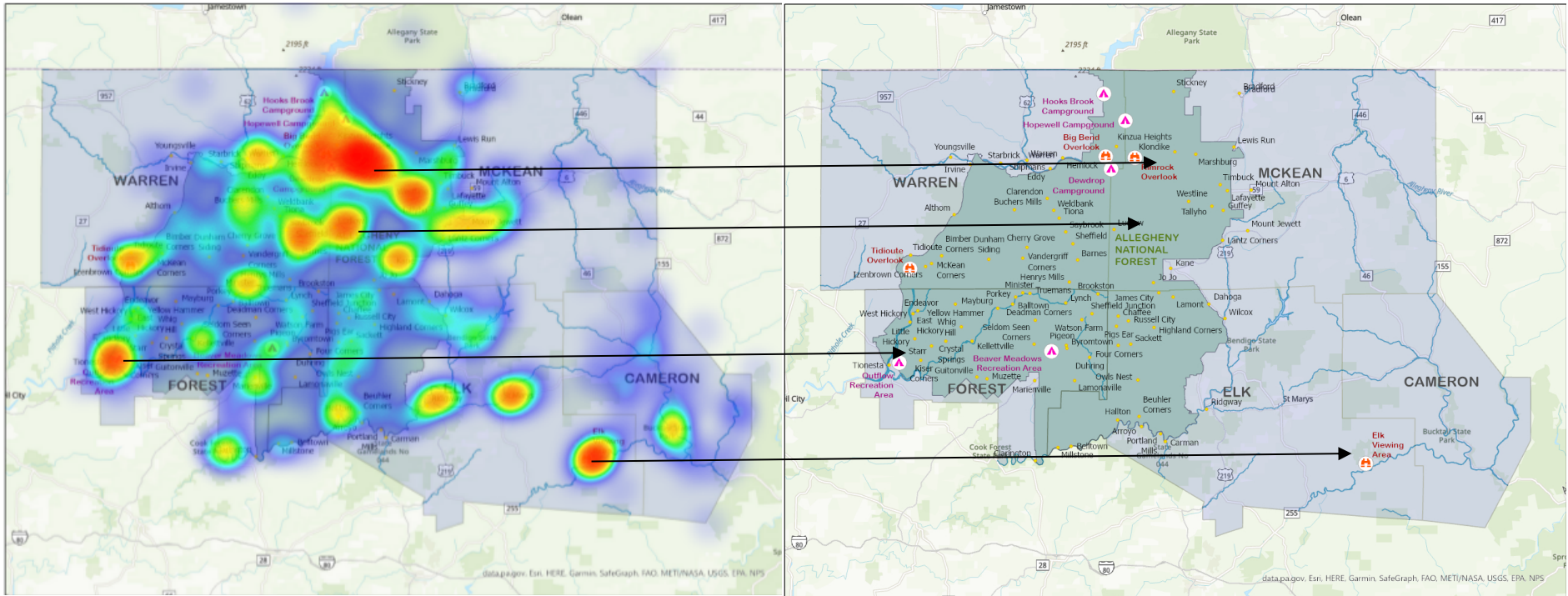


Figure 8: Heat Map of Areas Visited for Leisure



### 3.2.4. Activities Participated In

Table 5 presents activities that respondents participated in during their most recent trip to the region. Hiking was reported as the most frequent activity (mentioned by 62% of respondents), followed closely by viewing of wildlife (57.3%); food and drink experiences tied with sightseeing and canoeing/kayaking each at 52.9%. These top five activities were also reported as being among the most favorite activities engaged in by

respondents (Table 6). Other popular activities include fairs and events, fishing, and visiting farms/farmer's markets. In contrast, activities such as factory tours, geocaching, downhill skiing/snowboarding, and whitewater rafting were not only engaged in less frequently, but also not listed as one of the favorite activities.

**Table 5: Activities Participated in by Respondents**

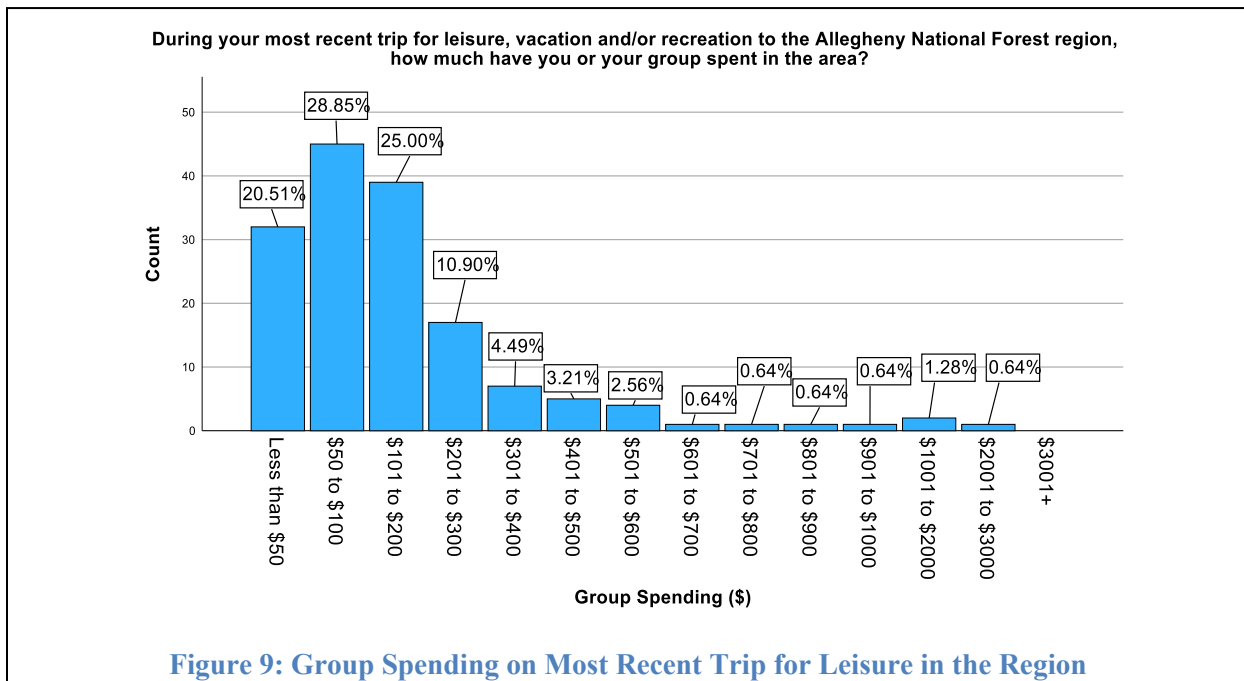
	Responses		Percent of Cases
	N	Percent	
Hiking	97	8.4%	61.8%
Viewing wildlife	90	7.8%	57.3%
Canoeing/Kayaking	83	7.2%	52.9%
Food & drink experiences	83	7.2%	52.9%
Sightseeing	83	7.2%	52.9%
Fairs & events	71	6.2%	45.2%
Farms/farmer's markets	61	5.3%	38.9%
Fishing	61	5.3%	38.9%
Leaf peeping	58	5.0%	36.9%
Picnicking	56	4.9%	35.7%
Rail-trail/Road Biking	54	4.7%	34.4%
Shopping	47	4.1%	29.9%
Swimming	44	3.8%	28.0%
Backpacking	40	3.5%	25.5%
Hunting	39	3.4%	24.8%
Other (please specify)	28	2.4%	17.8%
Mountain Biking	23	2.0%	14.6%
Performing arts	22	1.9%	14.0%
Rock Climbing/Bouldering	19	1.7%	12.1%
Nightlife	19	1.7%	12.1%
Civil war sites/historic sites	17	1.5%	10.8%
Snowmobiling/ATV/UTV riding	15	1.3%	9.6%
XC Skiing	13	1.1%	8.3%
Geocaching	9	0.8%	5.7%
Factory tours	9	0.8%	5.7%
Downhill Skiing/Snowboarding	6	0.5%	3.8%
Whitewater Rafting	3	0.3%	1.9%
<b>Total</b>	<b>1150</b>	<b>100.0%</b>	<b>732.5%</b>

### 3.2.5. Spending

Figure 9 presents the distribution of group spending/per trip reported by respondents. As shown, three-quarters (74.3%) of respondents reported group spending of between zero to \$200/per trip, which by a large margin accounted for the majority of respondents. This is followed by the group spending \$201 to \$300 (10.9%) and \$301 to \$400 (4.5%), indicating that only relatively few resident-tourists spend large amounts during their leisure trips to other counties within the region.

**Table 6: Favorite Activities Participated in by Respondents**

	Responses	
	N	Percent
Hiking	29	18.5%
Canoeing/Kayaking	22	14.0%
Sightseeing	15	9.6%
Viewing wildlife	12	7.6%
Mountain Biking	11	7.0%
Fishing	10	6.4%
Other	10	6.4%
Food & drink experiences	8	5.1%
Hunting	8	5.1%
Rail-trail/Road Biking	8	5.1%
Fairs & events	7	4.5%
Snowmobiling/ATV/UTV riding	6	3.8%
Backpacking	3	1.9%
Swimming	2	1.3%
XC Skiing	2	1.3%
Farms/farmer's markets	2	1.3%
Leaf peeping	2	1.3%
Downhill Skiing/Snowboarding	0	0.0%
Picnicking	0	0.0%
Rock Climbing/Bouldering	0	0.0%
Shopping	0	0.0%
Geocaching	0	0.0%
Civil war sites/historic sites	0	0.0%
Whitewater Rafting	0	0.0%
Factory tours	0	0.0%
<b>Total</b>	<b>157</b>	<b>100.0%</b>



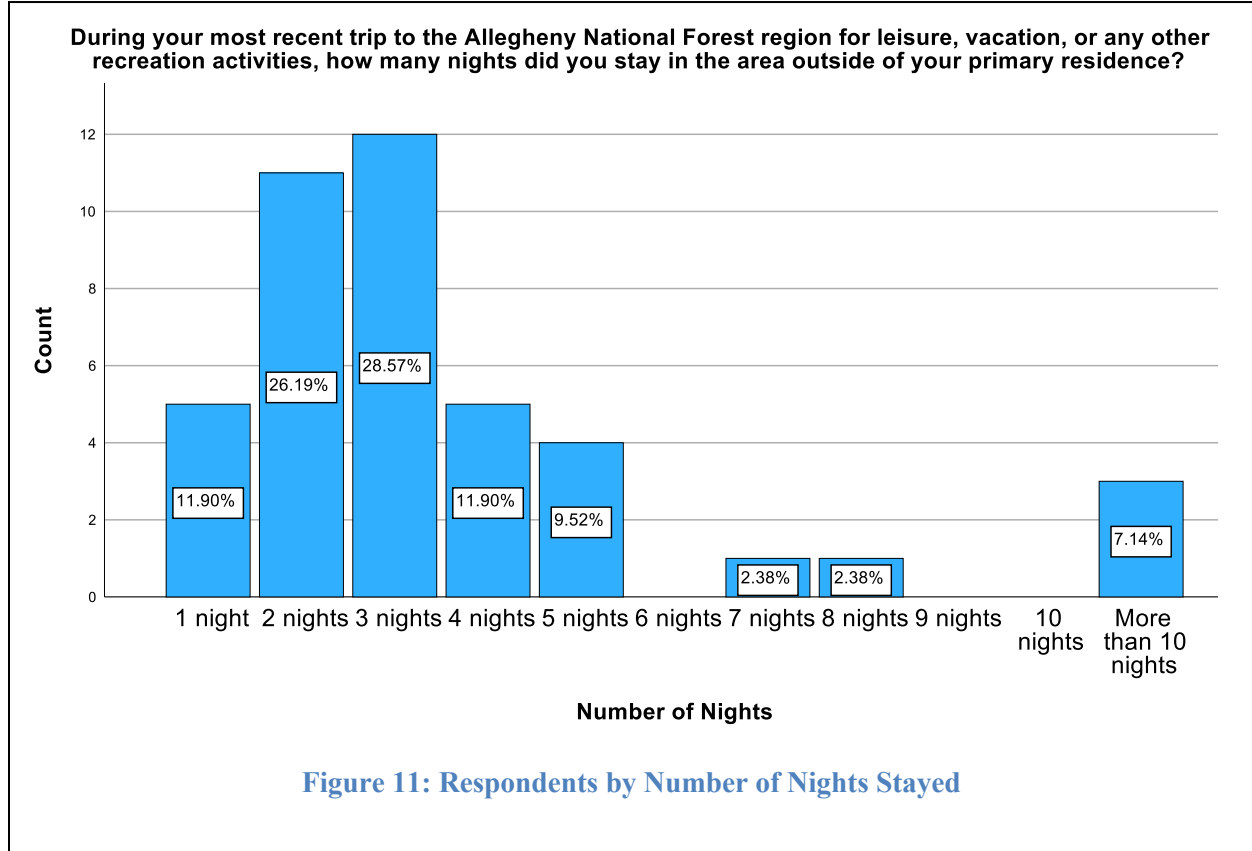
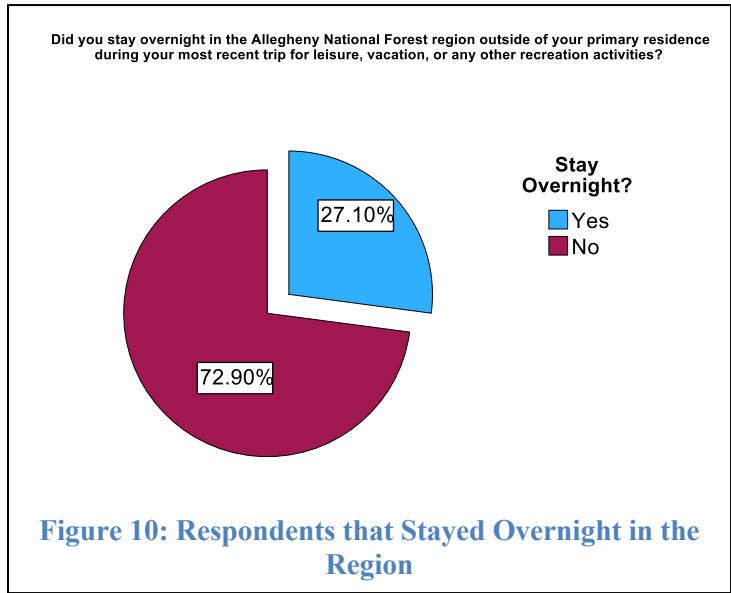
**Figure 9: Group Spending on Most Recent Trip for Leisure in the Region**

### 3.2.6. Overnight Stays

The spending patterns shown in Figure 9 generally correspond with most respondents visiting other areas in the region only for day trips (72.9%) vs. just over one-quarter (27.1%) staying overnight (Figure 10).

The 27.1% of respondents who reported having stayed overnight somewhere other than their primary personal homes when taking trips for leisure within the region were then asked to report how many nights they had stayed away from home on their most recent trip. Those results are shown in Figure 11, where two-thirds of respondents reported staying 2 or 3 nights

away from home (66.7%). This may be due to availability of weekend or long weekend getaways that require minimal travel. The next highest reported number of nights away were 4 nights and 1 night. About



seven percent of respondents reported having spent more than 10 nights, while no respondents reported having stayed 6, 9, or 10 nights away from home on their most recent trip in the region.

Table 7 highlights respondents’ overnight accommodations (outside of a personal home) by type that they stayed in during their most recent trip (multiple choices allowed). Over half of the cases reported using camping/tent (58.5%) accommodations, followed by RVs (29.3%), and hotels/motels/inns (12.2%). Those reporting that they stayed in an Airbnb accounted for just under ten percent (9.8%) of cases, while the remainder represented smaller shares, with 19.5% not specifying where they spend the night.

**Table 7: Respondent’s Types of Overnight Accommodations**

	Responses		Percent of Cases
	N	Percent	
Camping/tent	24	39.3%	58.5%
RV	12	19.7%	29.3%
Other (please specify)	8	13.1%	19.5%
Hotel/motel/inn	5	8.2%	12.2%
Airbnb	4	6.6%	9.8%
Friends and/or relatives	3	4.9%	7.3%
Second home	2	3.3%	4.9%
Bed & Breakfast	2	3.3%	4.9%
Rented house/apartment/VRBO	1	1.6%	2.4%
Timeshare	0	0.0%	0.0%
Youth hostel	0	0.0%	0.0%
Homestays	0	0.0%	0.0%
<b>Total</b>	<b>61</b>	<b>100.0%</b>	<b>148.8%</b>

### 3.3 Perceptions of Tourism Sustainability Indicators

#### 3.3.1. Importance

Table 8 presents respondents’ assessment of 32 sustainable tourism indicators in terms of their importance in the Allegheny National Forest region, with a Likert scale ranging from 1: least important to 5: Most important. These indicators are organized in four different categories, with 8 items each, relating to the environment, socio-economic factors, cultural items, and institutional factors, which reflect local tourism leadership and management characteristics. Two key summary statistics are presented: first, the mean or average of the responses to the Likert scale and, second, the share of respondents indicating the indicator was important or very important to them. The first captures the average sentiment among respondents, while the second reflects the intensity of preferences among respondents. It is possible for the Mean response to be high(er) while the intensity is lower, and vice versa. For example, items 9 “economic opportunities from tourism development” and 28 “Quality of public-private partnerships” both received a mean score of 4.18, but the former was considered important or very important by 78.7% of the respondents compared with only 75.9% for the latter. This was the same percentage as for item 21.

“Optimize visitor flow and minimize adverse impacts in cultural sites,” which received a mean ranking of only 4.09. (Continued on next page.)

**Table 8: Perceptions of Tourism Sustainability Indicators: Importance**

	1 Least Important	2 Less Important	3 Neutral	4 Important	5 Most Important	Not Applicable	Important + Most Important	Mean	Std Dev
3. Environmental quality (water, air, resource quality, etc.)	0.6%	1.7%	6.3%	13.8%	77.6%	0.0%	91.4%	<b>4.66</b>	<b>0.73</b>
1. Protection of the natural environment	1.7%	0.6%	8.0%	17.2%	71.8%	0.6%	89.1%	<b>4.59</b>	<b>0.81</b>
11. Improvement of the well-being of rural communities from tourism development	2.3%	0.6%	8.6%	29.3%	58.6%	0.6%	87.9%	<b>4.43</b>	<b>0.86</b>
6. Management of waste	1.7%	2.9%	10.9%	24.1%	60.3%	0.0%	84.5%	<b>4.39</b>	<b>1.01</b>
27. Local leaders' support for tourism development	3.4%	2.3%	12.6%	23.6%	58.0%	0.0%	81.6%	<b>4.30</b>	<b>1.01</b>
5. Control of negative impacts through long-term planning	2.3%	5.7%	10.3%	24.1%	57.5%	0.0%	81.6%	<b>4.29</b>	<b>1.02</b>
20. Guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors	2.9%	4.0%	13.8%	28.7%	50.6%	0.0%	79.3%	<b>4.20</b>	<b>1.01</b>
9. Economic opportunities from tourism development	5.2%	4.6%	11.5%	24.1%	54.6%	0.0%	78.7%	<b>4.18</b>	<b>1.13</b>
28. Quality of public-private partnership in tourism	4.0%	1.1%	17.2%	29.3%	46.6%	1.7%	75.9%	<b>4.18</b>	<b>1.04</b>
2. Rural authenticity	3.4%	3.4%	18.4%	23.6%	51.1%	0.0%	74.7%	<b>4.16</b>	<b>1.06</b>
14. Contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors, and the public	4.0%	2.9%	18.4%	24.7%	48.9%	1.1%	73.6%	<b>4.15</b>	<b>1.09</b>
13. More investment in tourism development	4.6%	3.4%	17.2%	25.9%	48.3%	0.6%	74.1%	<b>4.11</b>	<b>1.11</b>
21. Optimize visitor flow and minimize adverse impacts in cultural sites	2.3%	3.4%	18.4%	35.1%	40.8%	0.0%	75.9%	<b>4.09</b>	<b>0.97</b>
19. Accurate interpretative material that informs visitors of the significance of the cultural and natural aspects of the sites they visit	2.3%	5.2%	16.7%	35.6%	39.1%	1.1%	74.7%	<b>4.07</b>	<b>1.01</b>
29. A risk reduction, crisis management and emergency response plan	4.0%	5.7%	18.4%	24.1%	47.1%	0.6%	71.3%	<b>4.06</b>	<b>1.13</b>
12. Marketing and promotion of tourism assets to visitors	4.6%	4.6%	20.1%	23.6%	46.6%	0.6%	70.1%	<b>4.05</b>	<b>1.14</b>
23. Cultural/heritages sites accessible to physically disabled tourists	3.4%	6.3%	19.0%	28.2%	42.5%	0.6%	70.7%	<b>4.02</b>	<b>1.10</b>
10. High-paying jobs from tourism development	4.0%	5.7%	19.5%	29.3%	39.7%	1.7%	69.0%	<b>4.00</b>	<b>1.12</b>
17. A policy and system to evaluate, rehabilitate, and conserve cultural assets, including built heritage and cultural landscapes	2.9%	6.3%	17.8%	35.6%	36.8%	0.6%	72.4%	<b>3.99</b>	<b>1.04</b>
31. Public participation in sustainable destination planning and management	3.4%	8.0%	16.1%	34.5%	36.2%	1.7%	70.7%	<b>3.97</b>	<b>1.11</b>
18. Celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness	2.9%	6.9%	21.8%	30.5%	37.9%	0.0%	68.4%	<b>3.94</b>	<b>1.07</b>
15. Career opportunities and training in tourism	2.3%	5.7%	25.3%	31.6%	33.9%	1.1%	65.5%	<b>3.93</b>	<b>1.04</b>
24. Safeguarding cultural identify of local community	3.4%	8.0%	21.3%	29.9%	36.8%	0.6%	66.7%	<b>3.90</b>	<b>1.11</b>

26. Existence of a regional collaboration and marketing organization	6.3%	8.6%	14.4%	35.1%	33.9%	1.7%	69.0%	<b>3.87</b>	<b>1.21</b>
32. The destination management strategy/plan clearly visible and available online	5.2%	7.5%	23.6%	25.9%	36.8%	1.1%	62.6%	<b>3.85</b>	<b>1.18</b>
8. Management of overcrowding	5.7%	7.5%	23.6%	27.6%	32.8%	2.9%	60.3%	<b>3.83</b>	<b>1.21</b>
16. A system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards that addresses the needs of both visitors and residents	4.6%	10.3%	20.1%	28.2%	36.2%	0.6%	64.4%	<b>3.83</b>	<b>1.18</b>
30. A system to monitor and respond to socio-economic, cultural and environmental issues and impacts arising from tourism	5.2%	11.5%	21.8%	34.5%	25.9%	1.1%	60.3%	<b>3.68</b>	<b>1.16</b>
4. Reduction of energy consumption and improvement of efficiency in its use	6.9%	9.8%	29.9%	22.4%	30.5%	0.6%	52.9%	<b>3.61</b>	<b>1.22</b>
25. Evidence of links and engagement with other bodies	8.0%	8.6%	35.1%	25.3%	15.5%	7.5%	40.8%	<b>3.54</b>	<b>1.29</b>
7. Reduction of greenhouse gas emissions	12.6%	9.8%	23.0%	24.7%	28.2%	1.7%	52.9%	<b>3.51</b>	<b>1.37</b>
22. Opportunities for visitors to reflect on religious or other spiritual values	17.8%	16.1%	28.7%	21.8%	13.8%	1.7%	35.6%	<b>3.03</b>	<b>1.34</b>

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**Note: Items 1-8: Environmental; 9-16: Socio-economic; 17-24: Cultural; 25-32: Institutional**

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For 91.4% of respondents, “environmental quality” (item 3) is an important or the most important indicator, with a mean (M) ranking of  $M = 4.66$ , followed closely by “protection of the natural environment” (89.1%, with  $M=4.59$ ). The next-highest is “improvement of the wellbeing of rural communities from tourism development” (item 11) (87.9%,  $M = 4.43$ ), which is among the socio-economic measures. “local leaders’ support for tourism development” (item 27; 81.6%,  $M = 4.30$ ) also ranks highly, among the set of institutional indicators. In contrast, cultural indicators such as “opportunities for visitors to reflect on religious or other spiritual values” (item 22) and institutional indicators such as “evidence of links and engagement with other bodies” (item 25) were rated the lowest with 35.6% ( $M = 3.03$ ), and 40.8% ( $M = 3.54$ ), respectively, among respondents, who also did not rate these indicators as important or most important for sustainability.

Overall, resident respondents felt most strongly about the importance of environmental ( $M=4.13$ ) and socio-economic indicators ( $M= 4.09$ ), while cultural indicators ( $M= 3.91$ ) and institutional indicators ( $M= 3.93$ ) were deemed less important, comparatively, as sustainability measures or indicators.

### *3.3.2. Performance*

After asking respondents to rank these various indicators in terms of their importance, they were then asked how well they thought the region performed on the indicators. As discussed further below, when an indicator is considered important, but its performance is assessed to be low or poor, this represents an opportunity where the community may seek to change the underlying conditions that are causing the perceived low performance.

Table 9 presents respondents’ assessment of the performance of the 32 sustainable tourism indicators in the ANF region. The highest performance rating was given to “environmental quality (water, air, resource quality),” item 3, with which 75.2% of respondents were satisfied or very satisfied and a mean score of ( $M = 4.20$ ). This was followed by “rural authenticity,” which received a mean satisfaction rating of 4.14 and a satisfaction share of 67.2%. Next was “protection of the natural environment” (item 1), with a higher share (71.2%) of respondents satisfied but a mean score slightly below that of “rural authenticity,”  $M = 4.11$ . The three highest performing indicators — items 3, 2 and 1 — all relate to the environmental domain of sustainability. Interestingly, the next-highest mean score was given to item 29, an institutional sustainability factor, “a risk reduction, crisis management and emergency response plan,” but only 42.4% of respondents were satisfied or very satisfied with the performance. The highest share in this category was “neutral,” with 27.2%. Importantly, the lowest amount of satisfaction with performance was for the indicators of “high paying jobs from tourism development” (item 10) (32.0%,  $M$



= 3.35), “career opportunities and training in tourism,” and “economic opportunities from tourism development.” (Continued on next page.)

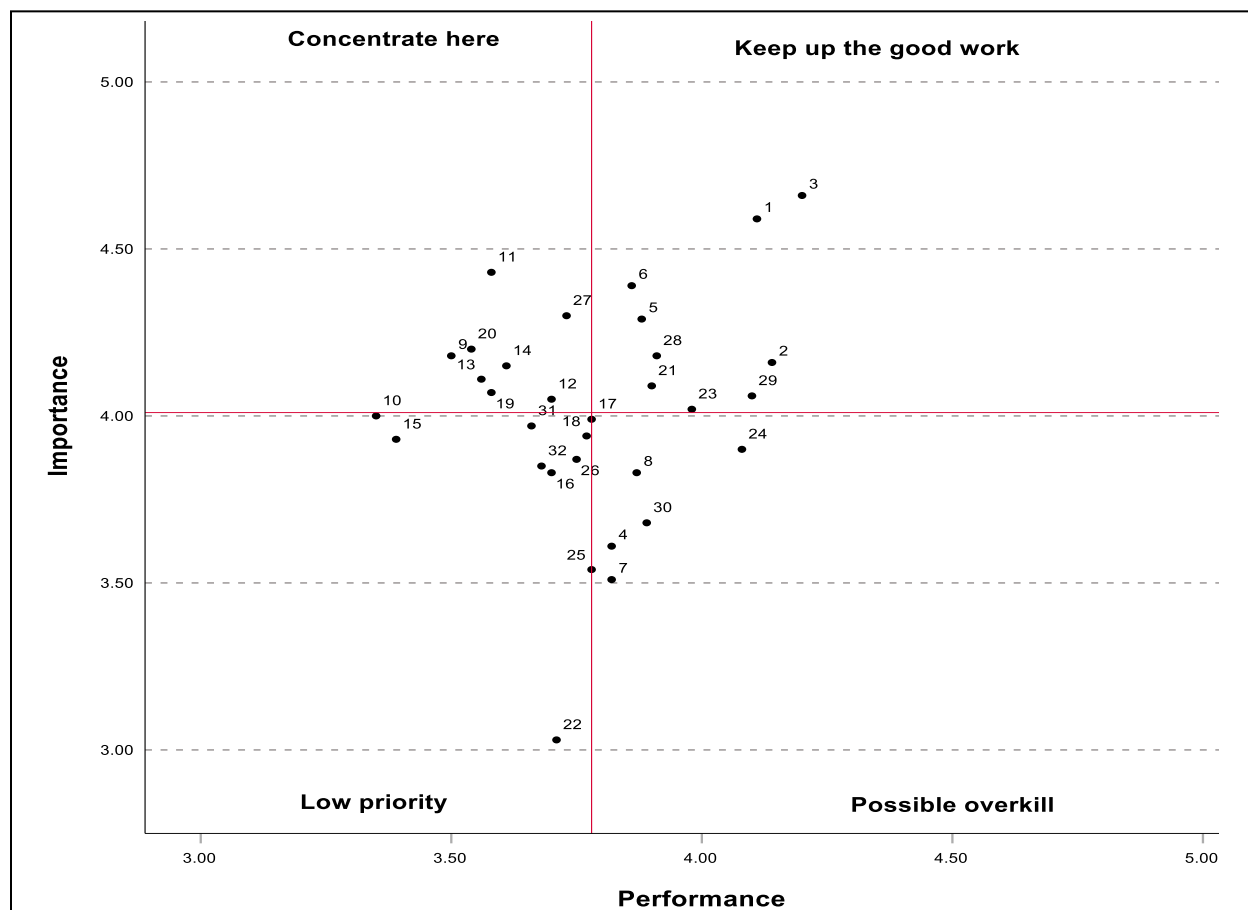
<b>Table 9: Perceptions of Tourism Sustainability Indicators: Performance</b>	1 Very Dissatisfied	2 Dissatisfied	3 Neutral	4 Satisfied	5 Very Satisfied	Unsure	Satisfied + Very Satisfied	mean	Std Dev
3. Environmental quality (water, air, resource quality, etc.)	2.4%	1.6%	17.6%	33.6%	41.6%	3.2%	75.2%	<b>4.20</b>	<b>0.98</b>
2. Rural authenticity	0.0%	2.4%	24.0%	36.8%	30.4%	6.4%	67.2%	<b>4.14</b>	<b>0.94</b>
1. Protection of the natural environment	1.6%	3.2%	21.6%	32.0%	39.2%	2.4%	71.2%	<b>4.11</b>	<b>0.99</b>
29. A risk reduction, crisis management and emergency response plan	4.8%	5.6%	27.2%	20.0%	22.4%	20.0%	42.4%	<b>4.10</b>	<b>1.40</b>
24. Safeguarding cultural identify of local community	2.4%	4.0%	31.2%	23.2%	24.0%	15.2%	47.2%	<b>4.08</b>	<b>1.24</b>
23. Cultural/heritages sites accessible to physically disabled tourists	4.0%	8.8%	29.6%	13.6%	30.4%	13.6%	44.0%	<b>3.98</b>	<b>1.37</b>
28. Quality of public-private partnership in tourism	3.2%	13.6%	24.0%	20.8%	24.8%	13.6%	45.6%	<b>3.91</b>	<b>1.37</b>
21. Optimize visitor flow and minimize adverse impacts in cultural sites	4.8%	7.2%	30.4%	21.6%	22.4%	13.6%	44.0%	<b>3.90</b>	<b>1.34</b>
30. A system to monitor and respond to socio-economic, cultural and environmental issues and impacts arising from tourism	7.2%	8.0%	28.8%	20.0%	16.8%	19.2%	36.8%	<b>3.89</b>	<b>1.48</b>
5. Control of negative impacts through long-term planning	4.8%	6.4%	28.8%	24.8%	26.4%	8.8%	51.2%	<b>3.88</b>	<b>1.26</b>
8. Management of overcrowding	3.2%	7.2%	27.2%	32.8%	20.8%	8.8%	53.6%	<b>3.87</b>	<b>1.18</b>
6. Management of waste	4.0%	11.2%	22.4%	27.2%	27.2%	8.0%	54.4%	<b>3.86</b>	<b>1.27</b>
4. Reduction of energy consumption and improvement of efficiency in its use	4.0%	4.8%	35.2%	28.0%	17.6%	10.4%	45.6%	<b>3.82</b>	<b>1.21</b>
7. Reduction of greenhouse gas emissions	7.2%	7.2%	29.6%	23.2%	18.4%	14.4%	41.6%	<b>3.82</b>	<b>1.40</b>
17. A policy and system to evaluate, rehabilitate, and conserve cultural assets, including built heritage and cultural landscapes	7.2%	11.2%	26.4%	21.6%	19.2%	14.4%	40.8%	<b>3.78</b>	<b>1.45</b>
25. Evidence of links and engagement with other bodies	6.4%	12.8%	28.8%	18.4%	15.2%	18.4%	33.6%	<b>3.78</b>	<b>1.50</b>
18. Celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness	6.4%	7.2%	31.2%	25.6%	17.6%	12.0%	43.2%	<b>3.77</b>	<b>1.34</b>
26. Existence of a regional collaboration and marketing organization	4.0%	12.8%	29.6%	20.8%	23.2%	9.6%	44.0%	<b>3.75</b>	<b>1.32</b>
27. Local leaders' support for tourism development	6.4%	12.8%	22.4%	26.4%	24.0%	8.0%	50.4%	<b>3.73</b>	<b>1.35</b>
22. Opportunities for visitors to reflect on religious or other spiritual values	11.2%	11.2%	25.6%	17.6%	16.0%	18.4%	33.6%	<b>3.71</b>	<b>1.60</b>
12. Marketing and promotion of tourism assets to visitors	6.4%	12.0%	24.0%	25.6%	26.4%	5.6%	52.0%	<b>3.70</b>	<b>1.31</b>
16. A system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards that addresses the needs of both visitors and residents	5.6%	14.4%	30.4%	14.4%	24.0%	11.2%	38.4%	<b>3.70</b>	<b>1.41</b>

32. The destination management strategy/plan clearly visible and available online	11.2%	9.6%	27.2%	20.0%	16.0%	16.0%	36.0%	<b>3.68</b>	<b>1.54</b>
31. Public participation in sustainable destination planning and management	8.8%	15.2%	24.0%	19.2%	19.2%	13.6%	38.4%	<b>3.66</b>	<b>1.51</b>
14. Contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors, and the public	6.4%	10.4%	36.0%	19.2%	19.2%	8.8%	38.4%	<b>3.61</b>	<b>1.33</b>
11. Improvement of the well-being of rural communities from tourism development	6.4%	16.0%	27.2%	20.0%	24.8%	5.6%	44.8%	<b>3.58</b>	<b>1.34</b>
19. Accurate interpretative material that informs visitors of the significance of the cultural and natural aspects of the sites they visit	5.6%	12.8%	31.2%	24.8%	19.2%	6.4%	44.0%	<b>3.58</b>	<b>1.27</b>
13. More investment in tourism development	5.6%	16.0%	28.8%	21.6%	22.4%	5.6%	44.0%	<b>3.56</b>	<b>1.30</b>
20. Guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors	10.4%	15.2%	24.0%	20.0%	20.8%	9.6%	40.8%	<b>3.54</b>	<b>1.48</b>
9. Economic opportunities from tourism development	6.4%	16.0%	27.2%	26.4%	19.2%	4.8%	45.6%	<b>3.50</b>	<b>1.28</b>
15. Career opportunities and training in tourism	9.6%	16.0%	31.2%	20.0%	15.2%	8.0%	35.2%	<b>3.39</b>	<b>1.39</b>
10. High-paying jobs from tourism development	12.0%	15.2%	32.8%	13.6%	18.4%	8.0%	32.0%	<b>3.35</b>	<b>1.46</b>

**Note: Items 1-8: Environmental; 9-16: Socio-economic; 17-24: Cultural; 25-32: Institutional**

Residents responding to the survey were more positive about the performance of environmental (3.96) and least positive about socio-economic (3.55) and institutional indicators (M= 3.81). Cultural indicators (M= 3.79) were perceived as performing worse than the institutional but better than the socio-economic sustainability indicators. As a next step, the tourism indicators were compared in terms of their importance to residents relative to whether they were being met, i.e., their performance. Also known as a Gap analysis, this shows where efforts for improvement in the community would have the highest impact (high importance but low performance), and where residents are satisfied in terms of how the important indicators are performing (i.e., “keep up the good work” in that both the performance and importance are high). Other areas are where efforts should be concentrated because performance is low, but importance is high; areas of possible overkill in that performance is high but importance is not; and areas of low priority in that performance is low but importance is also low (Figure 12).

The Gap analysis presented in Figure 12 shows that community residents felt best about the region’s environmental quality, in the sense that this was important to them, and that the community also was



**Figure 12: Performance-Importance (Gap) Analysis for ANF Residents**

Note: Items 1-8: environmental; items 9-16: socio-economic; items 17-24: cultural; items 25-32:

performing well on this indicator (no. 3. in the Figure). This was followed by “protection of the natural environment,” “management of waste,” “control of negative impacts through long-term planning,” “the quality of public-private partnerships in planning,” “rural authenticity” and “having a risk reduction, crisis management and emergency response plan.” These can be classified as areas in which to “keep up the good work.” In contrast, residents felt the greatest need for improvement was in the areas of “improvement of well-being of rural communities from tourism development,” “local leaders’ support for tourism development,” “guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors,” and “contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors and the public.” Among key socio-economic indicators, “economic opportunities from tourism development” and “more investment in tourism development” were other areas for improvement. “Career opportunities and training in tourism” was also rated as currently low-performing and of medium importance.

Another way to look at this is to use so-called Paired Samples tests (see Appendix). This analysis indicates that the greatest difference in perceived importance, as already noted, is for item 11, “improvement of the well-being of rural communities from tourism development,” with a net difference between importance and performance of  $4.43 - 3.58 = 0.800$ , which is statistically different from zero. This is followed by item 10, “high paying jobs from tourism development” with a difference of 0.640, and item 20, “guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors,” with a difference of 0.630. These are the areas in most urgent need of improvement. In contrast, one area where performance is already relatively high but also is not deemed to be important is 22, “opportunities for visitors to reflect on religious or other spiritual values,” with a difference of  $-0.624$  (also statistically significant).

### **3.4 Attitudes Toward Recreation and Tourism**

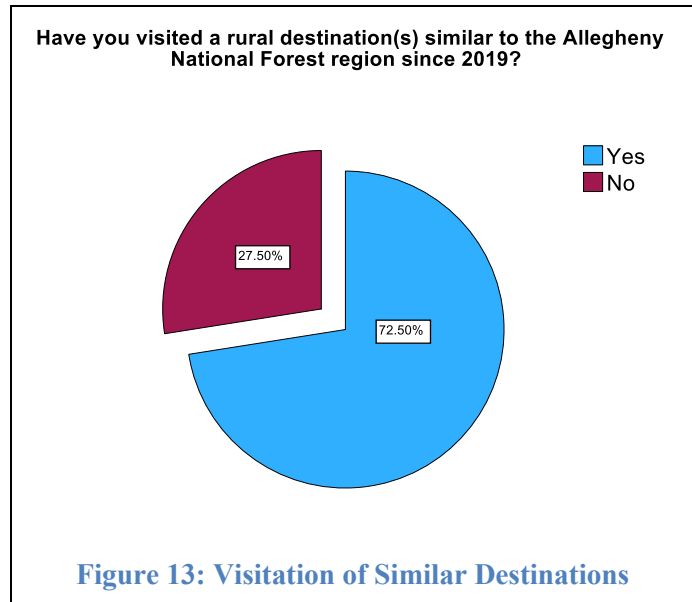
Table 10 presents respondents’ attitudes toward recreation/tourism in the ANF region; here they were asked to rate their agreement or disagreement with each item. Items 2, “tourism development will provide more economic opportunities for the area” (89.2%,  $M= 4.30$ ) and 9, “long-term planning and managed growth are important to control and negative impacts of tourism” (88.3%,  $M= 4.35$ ) scored highest in terms of the mean score and in their combinations of somewhat agree and strongly agree for each. Those were followed by 6, “tourism will improve the wellbeing of communities in the area” (77.5%,  $M= 3.97$ ) and 7, “the area should invest in tourism development” (75.0%,  $M= 4.00$ ). Also relatively high-scoring was “the area should do more to promote its tourism assets to visitors” (item 10, with 72.5% and  $M=3.93$ ).

In contrast, items 12, 11, and 3 received the lowest amount of agreement, respondents disagreeing that “an increase in tourism will lead to unacceptable amounts of traffic, crime and pollution,” “the area should discourage more intensive development of facilities, services, and attractions for tourists,” and “tourism development will only produce low-paying service jobs,” (21.7%, M= 2.46; 25.0%, M= 2.56; 30.8%, M= 2.85) respectively. These findings indicate that resident respondents currently tend to have a positive perception of recreation/tourism development in the area and, furthermore, do not think it will have undesirable effects within their communities. There was not much enthusiasm for raising taxes for tourism development in the region (21.7% strongly disagreeing with this suggestion), but even stronger disagreement that “an increase in tourism will lead to unacceptable amounts of traffic, crime, and pollution” (26.7%) or “the area should discourage more intensive development of facilities, services, and attractions for tourists” (28.3% strongly disagreeing). (Continued on next page.)

<b>Table 10: Attitudes Toward Recreation/Tourism Development</b>	Strongly Disagree	Somewhat Disagree	Neither Disagree nor Agree	Somewhat Agree	Strongly Agree	Somewhat Agree + Strongly Agree	Mean	Std Dev
9. Long-term planning and managed growth are important to control any negative impacts of tourism.	0.8%	0.8%	10.0%	39.2%	49.2%	88.3%	<b>4.35</b>	<b>0.76</b>
2. Tourism development will provide more economic opportunities for the area.	1.7%	1.7%	7.5%	43.3%	45.8%	89.2%	<b>4.30</b>	<b>0.82</b>
7. The area should invest in tourism development.	5.8%	4.2%	15.0%	34.2%	40.8%	75.0%	<b>4.00</b>	<b>1.12</b>
10. The area should do more to promote its tourism assets to visitors.	2.5%	8.3%	16.7%	38.3%	34.2%	72.5%	<b>3.93</b>	<b>1.03</b>
6. Tourism will improve the wellbeing of communities in the area.	5.8%	7.5%	9.2%	48.3%	29.2%	77.5%	<b>3.87</b>	<b>1.10</b>
5. Tourism development will help to protect natural/heritage resources in the area.	7.5%	15.8%	30.0%	32.5%	14.2%	46.7%	<b>3.30</b>	<b>1.13</b>
8. An increase in tourism will lead to crowding of outdoor recreation, historic, and cultural sites/attractions.	10.0%	31.7%	23.3%	25.0%	10.0%	35.0%	<b>2.93</b>	<b>1.17</b>
3. Tourism development will only produce low-paying service jobs.	11.7%	28.3%	29.2%	25.0%	5.8%	30.8%	<b>2.85</b>	<b>1.10</b>
1. An increase in tourism will increase the cost of living in the Allegheny National Forest Region.	16.7%	25.8%	24.2%	28.3%	5.0%	33.3%	<b>2.79</b>	<b>1.17</b>
4. I support taxes for tourism development in the area.	21.7%	20.8%	27.5%	25.0%	5.0%	30.0%	<b>2.71</b>	<b>1.21</b>
11. The area should discourage more intensive development of facilities, services, and attractions for tourists.	28.3%	28.3%	18.3%	9.2%	15.8%	25.0%	<b>2.56</b>	<b>1.40</b>
12. An increase in tourism will lead to unacceptable amounts of traffic, crime, and pollution.	26.7%	29.2%	22.5%	15.0%	6.7%	21.7%	<b>2.46</b>	<b>1.22</b>

### 3.5 Perceptions of Relative Competitiveness

Respondents were asked if they had visited other rural destinations that were similar to the ANF region (Figure 13), and if so, how they would compare the region to those comparable other areas. Figure 13 shows that 72.5% of respondents had visited similar destinations elsewhere, while 27.5% had not. Of those that had visited other similar destinations (Table 11), 49.4% (M= 3.51) reported that their local region had either somewhat better or much better levels of crowding (item 15), followed by 36.1% who rated their outdoor recreation opportunities



**Figure 13: Visitation of Similar Destinations**

(item 13) better than other areas that are similar in comparison (M= 3.18). “Rural tranquility and authenticity” was again rated highly, with 34.9% of respondents indicating this asset was somewhat or much better than the other destination (M=3.33). Conversely, “shopping” (2.42), and “lodging” (2.59) received the lowest scores when comparing the region to similar destinations (8.4%, M= 2.42; 14.5%, M= 2.69; and 14.5%, M= 2.66, respectively), highlighting these items as areas that may need the most improvement as perceived by resident respondents. Overall, the average score of all items regarding respondents’ perceptions of competitiveness of the Allegheny National Forest region as compared to similar destinations was rated (average mean of all 18 items) at 2.69, showing that opportunities exist for improving the area’s competitiveness as a tourism destination. These rankings provide clues as to where efforts could or should be expended in order to make the local destination more competitive relative to similar destinations.



<b>Table 11: Perceptions of Competitiveness</b>	Much Worse	Somewhat Worse	About the Same	Somewhat Better	Much Better	Somewhat Better + Much Better	Mean	Std Dev
15. Level of crowding	3.6%	6.0%	41.0%	34.9%	14.5%	49.4%	<b>3.51</b>	<b>0.94</b>
3. Rural tranquility and authenticity	1.2%	14.5%	49.4%	20.5%	14.5%	34.9%	<b>3.33</b>	<b>0.94</b>
13. Outdoor recreation opportunities	2.4%	24.1%	37.3%	25.3%	10.8%	36.1%	<b>3.18</b>	<b>1.00</b>
7. Security and safety	1.2%	7.2%	71.1%	15.7%	4.8%	20.5%	<b>3.16</b>	<b>0.67</b>
12. Prices	4.8%	14.5%	47.0%	31.3%	2.4%	33.7%	<b>3.12</b>	<b>0.86</b>
9. Resource conservation	6.0%	3.6%	69.9%	15.7%	4.8%	20.5%	<b>3.10</b>	<b>0.79</b>
1. Natural attraction	7.2%	16.9%	47.0%	18.1%	10.8%	28.9%	<b>3.08</b>	<b>1.04</b>
5. Diversity and uniqueness of local products	2.4%	22.9%	49.4%	16.9%	8.4%	25.3%	<b>3.06</b>	<b>0.92</b>
4. Hospitality and friendliness of local residents	6.0%	25.3%	41.0%	15.7%	12.0%	27.7%	<b>3.02</b>	<b>1.07</b>
2. Heritage and cultural assets	2.4%	28.9%	50.6%	15.7%	2.4%	18.1%	<b>2.87</b>	<b>0.79</b>
6. Accessibility	8.4%	19.3%	53.0%	15.7%	3.6%	19.3%	<b>2.87</b>	<b>0.91</b>
10. Festivals and events	6.0%	28.9%	41.0%	21.7%	2.4%	24.1%	<b>2.86</b>	<b>0.91</b>
11. Local food/eatery	12.0%	32.5%	33.7%	14.5%	7.2%	21.7%	<b>2.72</b>	<b>1.09</b>
18. Overall competitiveness	10.8%	26.5	48.2%	12.0%	2.4%	14.5%	<b>2.69</b>	<b>0.91</b>
8. Infrastructure	12.0%	28.9%	44.6%	9.6%	4.8%	14.5%	<b>2.66</b>	<b>0.98</b>
17. Lodging	12.0%	37.3%	34.9%	10.8%	4.8%	15.7%	<b>2.59</b>	<b>1.00</b>
14. Entertainment and night life	15.7%	34.9%	38.6%	6.0%	4.8%	10.8%	<b>2.49</b>	<b>0.99</b>
16. Shopping	15.7%	37.3%	38.6%	6.0%	2.4%	8.4%	<b>2.42</b>	<b>0.91</b>

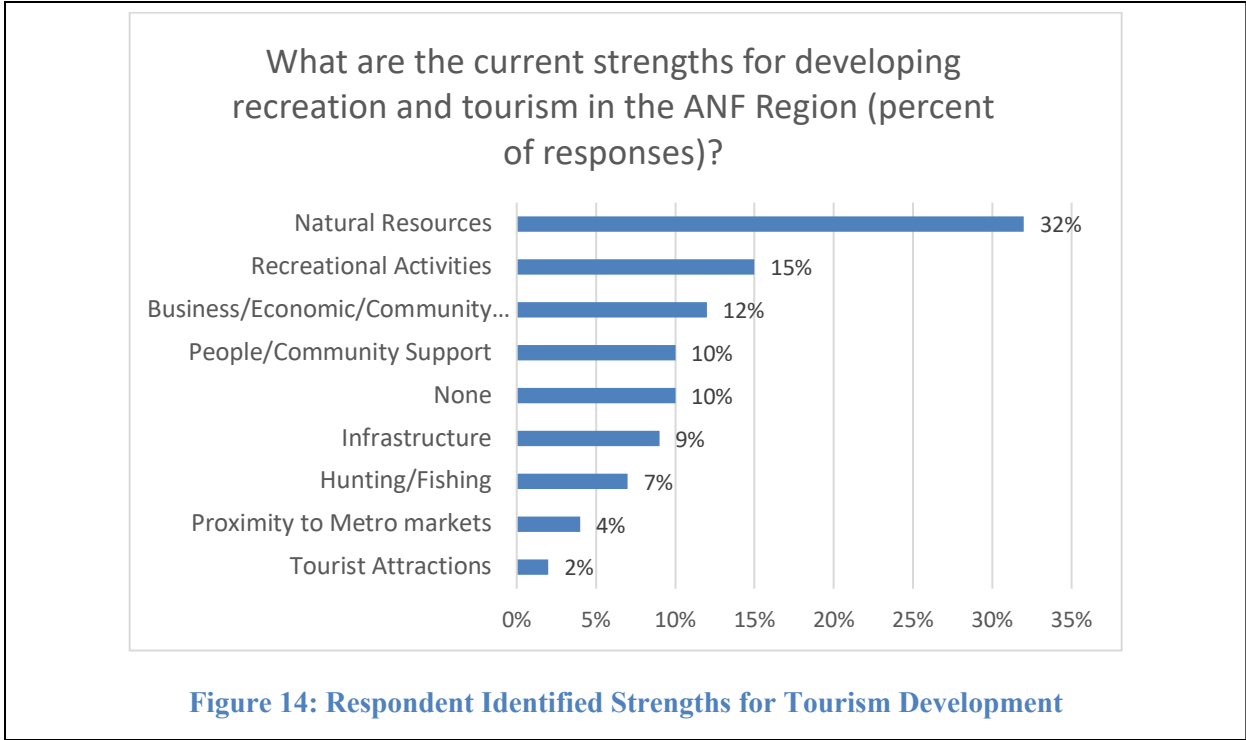
Community residents were asked to list up to three rural destinations they have visited since 2019 that they felt were like the ANF region. Out of 187 total other places mentioned, combining the first, second and third responses, the following ten locations were listed most frequently.

1. Cook Forest State Park (located just south of the ANF)
2. Adirondacks/Adirondack Park, NY
3. Great Smokey Mountains/Gatlinburg/Pigeon Forge (NC, TN)
4. Monongahela National Forest (WV)
5. Ohiopyle State Park, PA
6. Poconos, PA
7. George Washington National Forest (VA, WV, KY)
8. Letchworth State Forest, NY
9. Upper Peninsula of Michigan
10. Allegany State Park, NY

In addition, 137 other similar and competing locations were mentioned two or fewer times. Many of these were in the Northeast U.S., but faraway places such as Breckenridge, CO; the Natchez Trail parkway (AL, MS, TN); Joshua Tree National Park, CA; Outer Banks, NC; Rocky Mountain NP; and Yellowstone, Moab and Southern Utah were also listed.

### **3.6 Perceived Strengths for Developing Tourism and Recreation (Assets)**

Survey respondents felt that the ANF region's natural resources were the most important current asset (or strength) for developing local recreation and tourism (Figure 14). Proximity to metro markets and tourist attractions were mentioned far less frequently (fewer than 5%) and may be relative weaknesses rather than perceived strengths. One out of ten respondents (10%) felt that support from people in the community was a strength, tied (also at 10%) with the share who felt the region did not have any strengths for developing recreation and tourism in the ANF Region.

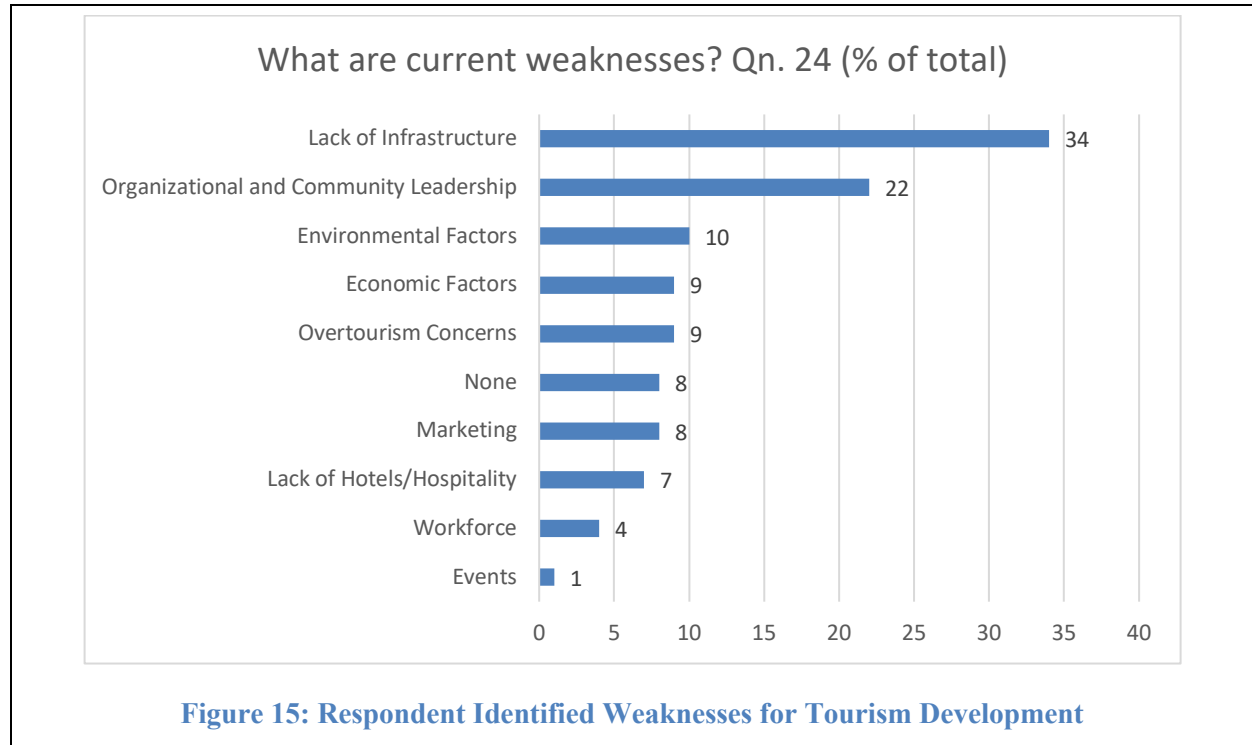


For the open-ended question, “In your opinion, what are the current strengths for developing recreation and tourism in the ANF region,” the following are representative samples of answers recorded.

- A community that wants to showcase great local resources
- There are a lot of small communities that are working to improve their towns. This is a good time to jump on board.
- Mountain biking, hiking, camping - performing arts. New small businesses with a local charm. Historic architecture.
- Outdoor recreation opportunities such as hiking, biking, fishing, water-based activities, etc. are major strengths of the area. Low cost of living and high quality of life are large selling points as well. There are also lots of economic development providers who are willing and able to help get these types of enterprises started as well as creative funding opportunities.
- The Allegheny River and its tributaries, hunting and fishing, wildlife viewing, environmental services
- The PA Wilds has the largest collection of beautiful natural public lands, people of all ways of life can appreciate and enjoy something they have to offer.

### 3.7 Perceived Weaknesses for Developing Tourism and Recreation

Asked to identify perceived weaknesses in the ANF region in terms of developing the tourism and recreation economy, residents reported a “lack of infrastructure” (34%) as well as a “lack of organizational and community leadership (22%) (Figure 15). A lack of Marketing of the region, Hotels and hospitality facilities, Workforce and Events in general were also identified as current weaknesses, although each was mentioned by fewer than ten percent of respondents. Eight percent of respondents felt there were no current weaknesses that needed to be addressed.



In the open-ended question section, respondents noted the following as illustrative examples of weaknesses for developing the tourism and recreation economy of the ANF region. Two respondents raised concerns about possible adverse effects of having tourists from the outside visit the community.

- *Zero name recognition relative to ANF or PA Wilds. Paved road quality is abysmal. Road cycling is basically gone as a result of tar and chip roads. Sure you can still road [ride] on the road, but you need to run 32mm tires and the experience is not the same. Driving an RV on the roads here is punishing. Before you promote camping here, rent a motorhome and drive it on the roads in this region.*

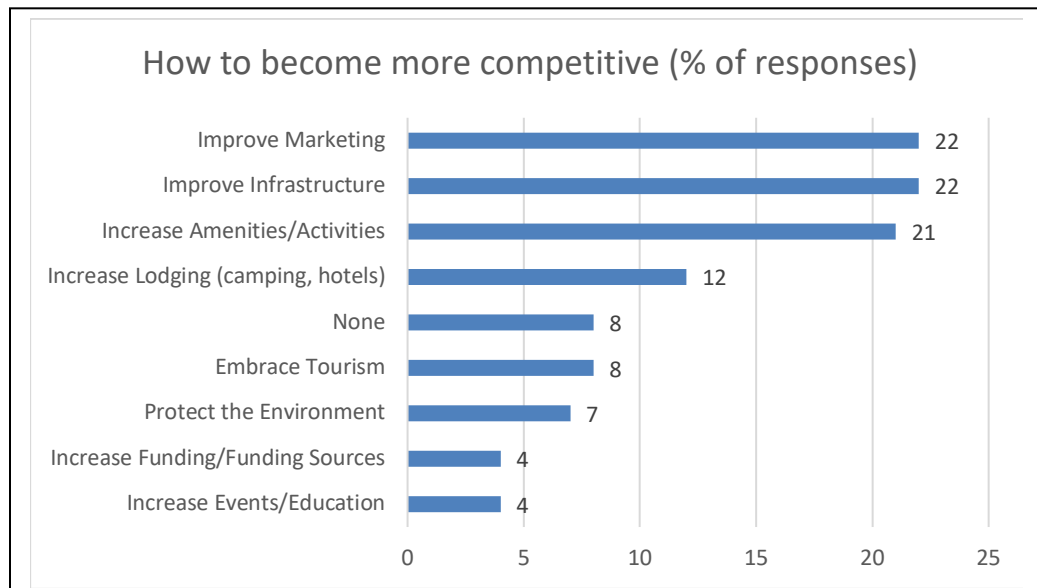
- *Reluctance of communities to embrace the opportunities and have an open mind about welcoming visitors from a diverse set of geographies and cultures.*
- *I am concerned about the large crowds and what comes along with them - pollution, trash and litter, loudness, etc. I have lived in Benetzung and have seen first hand what reckless tourists can do, especially during the rut and tourists go crazy.*
- *Unintended decline of natural resources and beauty of the area. More people, more destruction of land and waterways.*
- *See previous comment. Additionally, we need to further market our assets. Marketing takes money. We need to find sufficient funds. PA should allow us to add local room taxes for tourism at campgrounds, Airbnbs.*
- *Camping infrastructure, ADA access to the river*
- *Not many activities for youth in town and not many job opportunities for teens.*
- *Reluctance of communities to embrace the opportunities and have an open mind about welcoming visitors from a diverse set of geographies and cultures.*
- *A defined plan to market the area*

### 3.8 Suggestions for Improving the Region’s Competitiveness

Area residents responding to the survey also had suggestions for making the ANF region more competitive for tourism and the recreation economy. Improving the marketing and infrastructure in the region along with increasing the number of amenities and activities available to visitors ranked highly among

respondents, followed by making more lodging available both for camping and hotels (Figure 16).

Representative responses to the open-ended



**Figure 16: Respondent Identified Methods to Improve Competitiveness**

questions related to becoming more competitive as a tourism and recreation region included the following:

- *I believe the PA Wilds team is helping build a cooperative effort of businesses and entities working to collectively improve the marketing of the region. It just takes time.*
- *Maybe hire a trail guide specialist. Put in a mountain slide somewhere. Do a roof top restaurant that views the mountains. Take a chair lift up the mountain. Do caving. Why do people from PA like to go to Gatlinburg, TN? However, they have definitely over did Gatlinburg, it was so much nicer 15 years ago. However, everyone goes there to hope to see wildlife and views of the mountains. Sometimes a little bit goes a longway. Keep the beauty of the forest!*
- *More advertising, better hotels and accommodations, more attractions.*
- *create more opportunities for atv/utv riding areas that people are traveling outside the area to enjoy else where.*
- *Grants for businesses to provide more events, destinations.*
- *The Kinzua Dam and river have declined significantly since the 1980s and 90s in visitation and maintenance of the facilities. The Kinzua Beach is a ghost town and the facilities are in shambles. The one bright spot is the Wolf Run Marina. There needs to be more facilities for overnight stays near the marina and Jakes Rocks and Rimrock overlook. A well-managed resort much like the Cacapon State Park of West Virginia would be ideal for that area.*

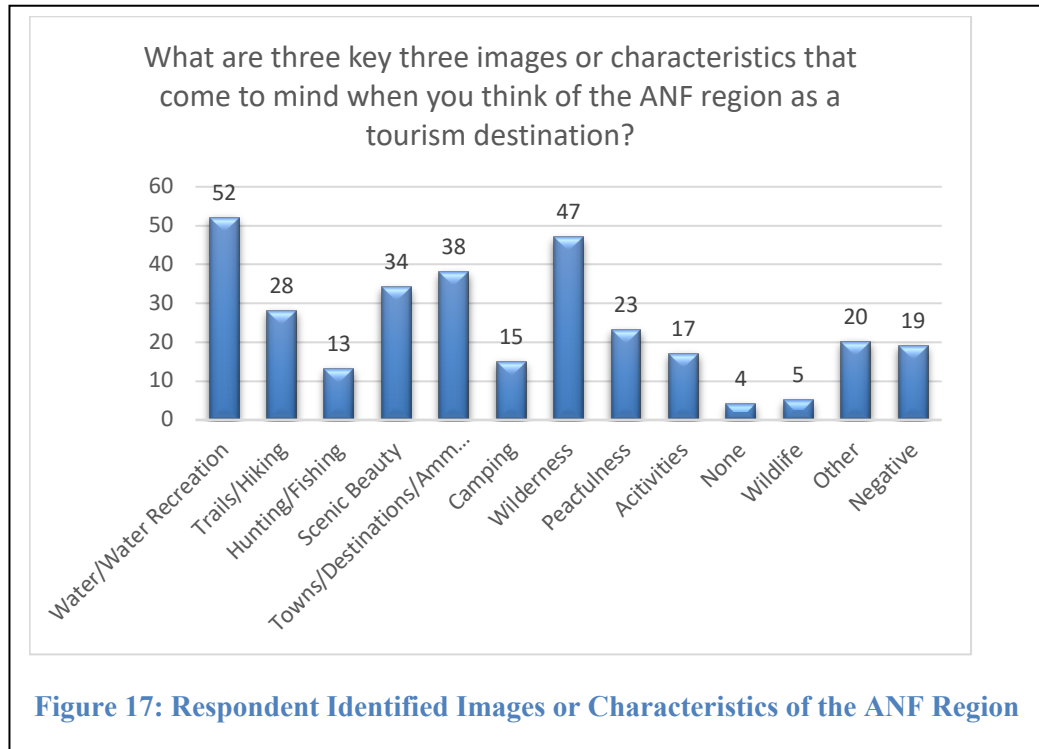
The more common themes among these answers were:

- More access to ATV/UTV trails and more ATV trails in general.
- Accessibility to trails in the National Forest and more signage.
- Improved roads and signage for directions.
- Improved ADA accessibility at tourist locations.
- Improved hospitality industry (lodging, restaurants and nightlife)
- More events to attract tourists.
- More campgrounds.

### 3.9 Key Characteristics of the Region for Developing Tourism and Recreation

Water and water recreation were mentioned by more than half of the survey respondents as being a key image or characteristic of the region as a tourism or recreation destination (Figure 17). This was followed by the wilderness, towns/destinations/amenities and scenic beauty. Hunting, fishing and wildlife were listed by far fewer of the respondents as being a key draw or feature of the ANF region.

In response to the open-ended question: “What are three key three images or characteristics that come to mind when you think of the Allegheny National Forest region as a tourism or recreation



destination?” respondents gave the following representative answers:

- Water recreation and access to rivers, lakes and streams were common answers. Some of the highlighted areas were:
  - Allegheny River
  - Clarion River
  - Canoe/Kayaking
  - Allegheny Reservoir
  - Fishing
- The most mentioned attractions were:
  - Kinzua Reservoir/Kinzua Dam
  - Kinzua State Park
  - Jake’s Rocks

- Scenic Beauty, Peacefulness, Wilderness, and Wildlife were listed as common images as well, with some respondents also mentioning:
  - Forests and Hiking Trails
  - Solitude and Rural Environment of the Region
  - The sprawling mountains and scenic views
  - Wildlife (especially the elk herd)
- Many outdoor recreation activities:
  - Respondents mentioned numerous recreation activities in the region including:
    - Hiking, ATV riding, mountain biking, water sports, and rock climbing
- Negative characteristics mentioned by respondents included the following:
  - Overcrowding in popular areas.
  - Some towns look dilapidated and run down.
  - Economic struggles of current residents.
  - Oil and logging industry overtaking some areas.

Survey respondents were also asked to list up to three specific distinctive or unique attractions or events that they thought represent the Allegheny National Forest region in terms of tourism and recreation. In rough order of frequency, the following were listed:

- Festivals/Events
- Streams/Waterways
- Kinzua Bridge
- Kinzua Reservoir/Dam
- Trails
- Other
- Wildlife
- Jakes Rocks
- None
- Towns
- Allegheny Reservoir
- Fishing/Hunting
- Forest

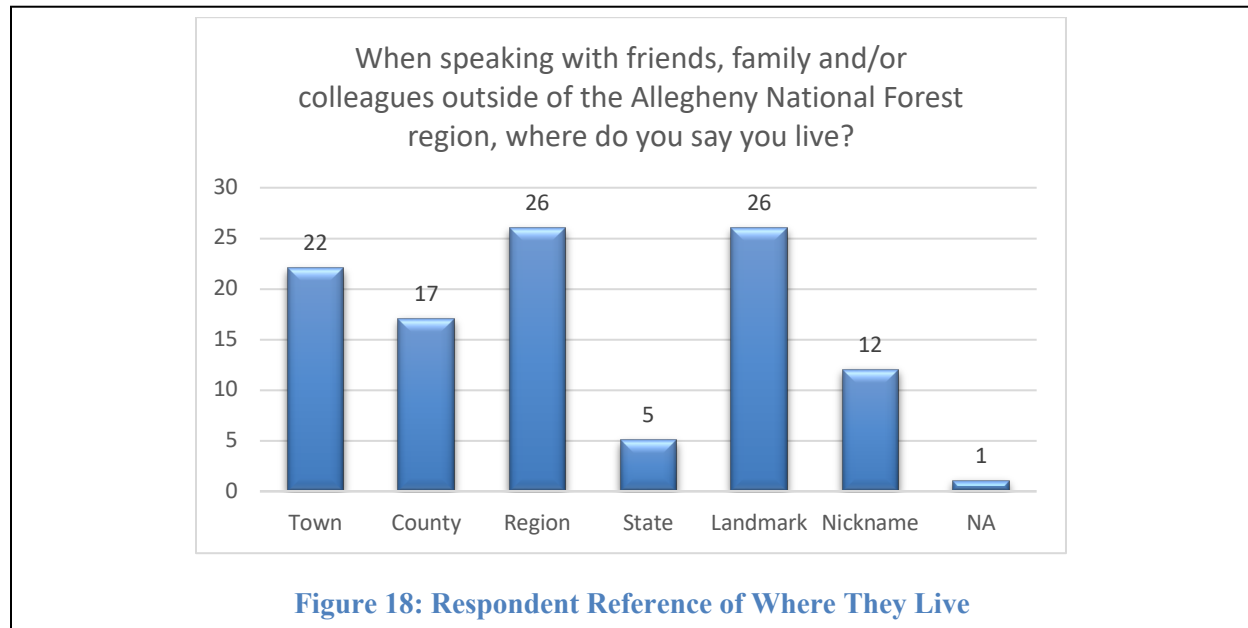


When asked to list the first three words or phrases respondents would use to describe the Allegheny National Forest region to someone who had never been here before, the following were mentioned with the frequency shown for the first response (Table 12):

**Table 12: Respondent Identified Phrases to Describe the ANF Region**

Beauty/beautiful	47
Peaceful	24
Remote	11
Natural	11
Quiet	10
Forest	9
Green	8
Serene	7

To understand their sense of place in terms of the geography in which they live, residents surveyed were asked which label they used to describe where they live, when talking to others who lived elsewhere (Figure 18). The labels “region” and “landmark” were mentioned most frequently, i.e., by one-quarter of respondents.



### 3.10 Additional Comments Related to Tourism and Recreation

Finally, respondents were asked if they had any additional comments about tourism in the ANF region, related to topics such as improving the infrastructure or general concerns about tourism and underlying economic opportunities. The following open-ended responses are again illustrative of the kinds of comments received. Especially noteworthy are the concerns about “over tourism.” While few respondents listed this as an issue, the response underscores the importance of developing and managing natural areas in a way that does not destroy the very features that serve as attractions in the first place.

## **Improve Infrastructure**

- *Yes. I appreciate the effort to promote tourism but what is done in North Central PA in general is comparable to waxing a car without first washing it. Yes, visitors are coming, but the roads and the endless blighted properties are going to ensure it never becomes what you want it to become. Having traveled alot both by car, RV, and bicycle in PA in particular in recent years, there is an obvious disparity in the quality of the roads in North Central PA and other areas of PA. Blight in all of PA is rampant. The only area I have seen that is worse is eastern Tennessee. You cannot go 1 mile in any direction without seeing a dilapidated property. You cannot visit any of the "major attractions" in the region without seeing innumerable blighted properties. It needs to be addressed, if not attacked, by the state and local governments, and by the residents as well.*
- *Kinzua Beach is in desperate need of an overhaul. Please take care of that gem.*
- *Any funding put towards infrastructure and sustainability efforts will enhance ecotourism efforts already being done in the region. Particular attention should be placed on refreshing the small towns and communities that would support that tourism.*

## **Community**

- *ANF is underutilized. We residents like it that way but, unfortunately, we need to have jobs.*
- *It is an amazing place to raise a family. We definitely need to take more of an advantage of our We have incredible architecture - without it we lose our charm. We need protections for our buildings and landscapes. area (in an educated, organized, resourceful way). It would be great to bring our schools into it.*
- *We have incredible architecture - without it we lose our charm. We need protections for our buildings and landscapes.*

## **Tourism Concerns**

- *We live in a rural area because we like the rural area and do not appreciate being overrun by city folk; the dollars of tourism are overrated*
- *No one is paying to come see trees and streams. There is nothing here. Stop your pipe dreams that there is something people want to see. Kinzua Dam isn't a draw either. Lots of dams and rivers around the east coast*
- *Tourism has a double edge. There's a fine line that we need to maintain when considering tourism. Without proper planning and organization, tourism could destroy*

*the very thing people are coming to do here. The PA Wilds and Leave No Trace have partnered to promote responsible and sustainable outdoor recreation and tourism. I hope to help promote that and support our community to grow this tourism industry with restraint and awareness.*

- *not interested in tourist invading the area*

### **Tourism and Economic Opportunity**

- *Glad to see it is finally getting the recognition that it deserves along with the communities that surround it*
- *Keep up the good work lets promote and keep the whole thing going*
- *I think Warren and Warren County are doing an awesome job of promoting their natural beauty, but I think that McKeen county is not, and I feel like we need to do more to develop attractions for out-of-towners because our natural beauty is vast and all around us also*
- *The ANF is a vast and expansive opportunity to bring in more of the outdoorsy recreation for every month of the year. Recreation businesses could thrive here and can work together to build success amongst each other. I've talk to many individuals just within an hour from the ANF that had no idea what there was to offer and the small community that frequently uses the ANF for recreational enjoyment trying to bring them people in and show them.*

### **Environmental Protection**

- *Inhibit conspicuous consumption preserve the healthy natural state. Don't turn this area into another "theme park" destination.*
- *It's a beautiful area but forest fragmentation and resource extraction have degraded it. I once read that the ANF is the most fragmented national forest in the US. We need to protect the ANF and the region's forests from more fragmentation due to large scale solar and wind energy protection cutting down and fragmenting more forests, as well as natural gas extraction, etc.*
- *Remember, it is NOT about generating more "boots on the ground" or more "heads in the beds," etc. per se, but rather it is first and foremost about forever preserving the WILDNESS of the wilderness as an end in itself, as Tionesta native and Wilderness Act of 1964 author Howard Zahniser always used to say. The visitation will be there, but it can ONLY ever happen within the context of permanently preserving the WILDNESS of the wilderness.*

## 4. Conclusion

The kind of information generated and presented in this report can help destination management organizations and other local businesses or non-profits to better understand the tourism-related and recreational activities engaged in by local residents, as well as their perceptions. Knowing residents' perceptions and opinions of key tourism sustainability indicators related to environmental, socio-economic, cultural and institutional factors can help ensure that future developments are consistent with local preferences. For residents in the ANF area, environmental quality in terms of water, air and other resources, rural authenticity of the region and protection of this natural environment were all important and ranked highly with mean scores above 4.0. Having risk reduction, crisis management and emergency response plans also were important, as was safeguarding the cultural identity of the local community. Comparing and contrasting this information with that collected in the visitor surveys can be valuable for identifying areas of conflict and synergy, as well as where future investments can help make the area more attractive to all tourists, local and visiting.

Together with the companion report on visitors' travel behavior to and perceptions of tourism sustainability in the ANF region, this report can serve as a potential blueprint for developing the local tourism and recreation economy sectors. Ensuring that such a development benefits the community more broadly requires extensive community discussion and deliberation.

## 5. References

Deng, J., D. Arbogast, Y. Zhuang and S.J. Goetz (2024), "Visitors' Travel Behavior and Perceptions of the Allegheny National Forest Region," unpubl. Report available at:  
<https://nercrd.psu.edu/tourism-research-in-allegheny-national-forest/>

## Appendix

Biggest I-P gaps are: Improvement of Well-Being of community resident from tourism development (0.800); High-paying jobs from tourism development (0.640); and Guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors (0.632).

Paired Samples Test					
	Mean		Mean Difference	Significance	
	Importance	Performance		<i>p</i>	
1. Protection of the natural environment	4.59	4.11	.504	<.001	***
2. Rural authenticity	4.16	4.14	.032	.792	
3. Environmental quality (water, air, resource quality, etc.)	4.66	4.20	.464	<.001	***
4. Reduction of energy consumption and improvement of efficiency in its use	3.61	3.82	-.192	.183	
5. Control of negative impacts through long-term planning	4.29	3.88	.424	.005	**
6. Management of waste	4.39	3.86	.536	<.001	***
7. Reduction of greenhouse gas emissions	3.51	3.82	-.304	.079	
8. Management of overcrowding	3.83	3.87	-.080	.581	
9. Economic opportunities from tourism development	4.18	3.50	.584	<.001	***
10. High-paying jobs from tourism development	4.00	3.35	.640	<.001	***
11. Improvement of the well-being of rural communities from tourism development	4.43	3.58	.800	<.001	***
12. Marketing and promotion of tourism assets to visitors	4.05	3.70	.256	.043	*
13. More investment in tourism development	4.11	3.56	.496	<.001	***
14. Contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors, and the public	4.15	3.61	.448	.002	**
15. Career opportunities and training in tourism	3.93	3.39	.456	.002	**
16. A system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards that addresses the needs of both visitors and residents	3.83	3.70	.104	.512	
17. A policy and system to evaluate, rehabilitate, and conserve cultural assets, including built heritage and cultural landscapes	3.99	3.78	.184	.230	
18. Celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness	3.94	3.77	.128	.383	
19. Accurate interpretative material that informs visitors of the significance of the cultural and natural aspects of the sites they visit	4.07	3.58	.472	<.001	***
20. Guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors	4.20	3.54	.632	<.001	***
21. Optimize visitor flow and minimize adverse impacts in cultural sites	4.09	3.90	.184	.216	
22. Opportunities for visitors to reflect on religious or other spiritual values	3.03	3.71	-.624	<.001	***
23. Cultural/heritages sites accessible to physically disabled tourists <sup>a</sup>	4.02	3.98	.064	.655	
24. Safeguarding cultural identity of local community	3.90	4.08	-.136	.339	
25. Evidence of links and engagement with other bodies	3.54	3.78	-.208	.161	
26. Existence of a regional collaboration and marketing organization	3.87	3.75	.096	.498	
27. Local leaders' support for tourism development	4.30	3.73	.488	.002	**
28. Quality of public-private partnership in tourism	4.18	3.91	.232	.117	
29. A risk reduction, crisis management and emergency response plan	4.06	4.10	-.144	.325	
30. A system to monitor and respond to socio-economic, cultural and environmental issues and impacts arising from tourism	3.68	3.89	-.200	.210	
31. Public participation in sustainable destination planning and management	3.97	3.66	.272	.086	
32. The destination management strategy/plan clearly visible and available online	3.85	3.68	.176	.305	

\*p < 0.05, \*\*p < 0.01, \*\*\*p <= 0.001

Specific sites in the region visited by ANF residents.

	N	Responses %	Percent of Cases
Allegheny River	110	11.4%	62.9%
Clarion River Water Trail (Elk)	38	3.9%	21.7%
Eldred World War II Museum	12	1.2%	6.9%
Elk Country Visitor Center (Benezette Township)	88	9.1%	50.3%
Kinzua Bridge State Park Visitor Center and Sky Walk (McKean)	121	12.6%	69.1%
Kinzua Dam (Warren & McKean)	116	12.0%	66.3%
Ridge Road (Cameron County)	45	4.7%	25.7%
Rim Rock	73	7.6%	41.7%
Sinnemahoning Canyon Vista	27	2.8%	15.4%
Straub Brewery (Elk County)	60	6.2%	34.3%
Table Falls	10	1.0%	5.7%
The Fred Woods Trail (Cameron County)	27	2.8%	15.4%
Trails at Jake's Rock (Warren)	71	7.4%	40.6%
Twisted Vine Beverage	15	1.6%	8.6%
Zippo/Case Museum (McKean County)	43	4.5%	24.6%
Winslow Hill	60	6.2%	34.3%
Others (Please specify)	48	5.0%	27.4%
Total	964	100.0%	550.9%