# Visitors' Perceptions of Recreation Economy in the Monongahela National Forest Area


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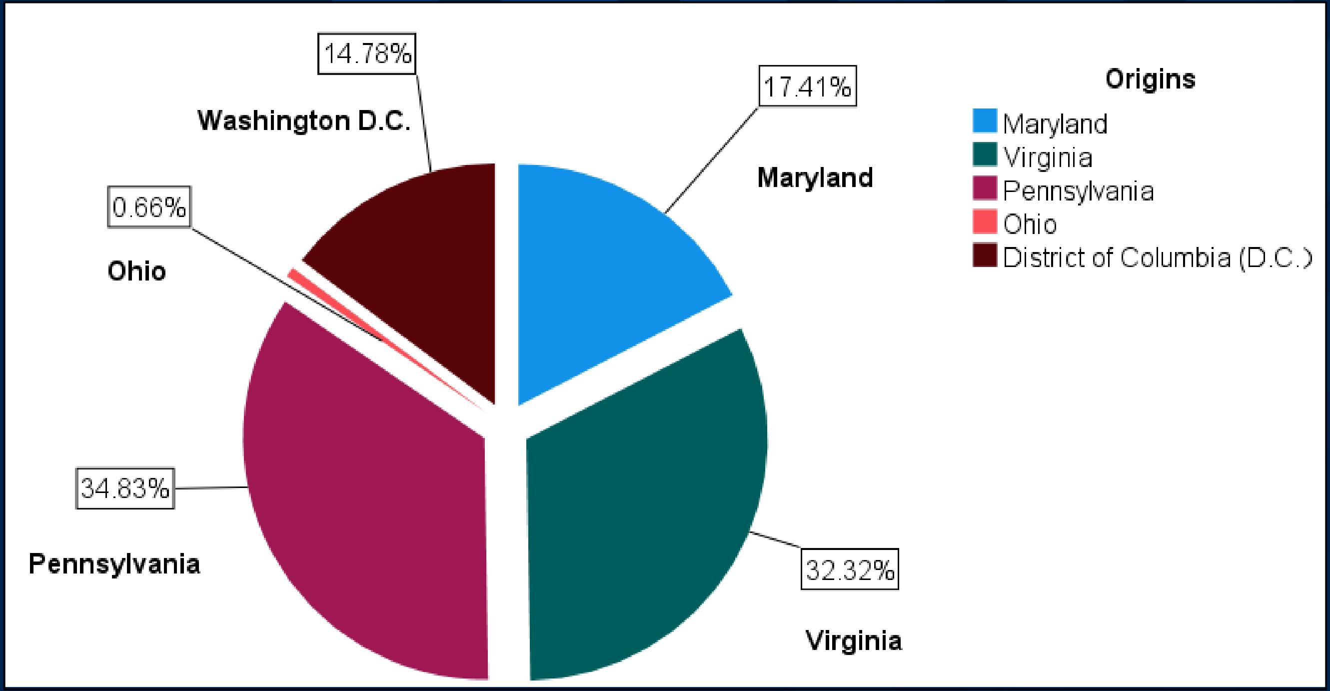
# About the survey

- Administered online by Qualtrics
- The survey was carried out between Oct. 21, 2021 and Jan. 8, 2022
- Participants: 621 completed ones (out of 815)
- Targeted states: PA, VA, MD, OH, DC

# Section 1: Background Information

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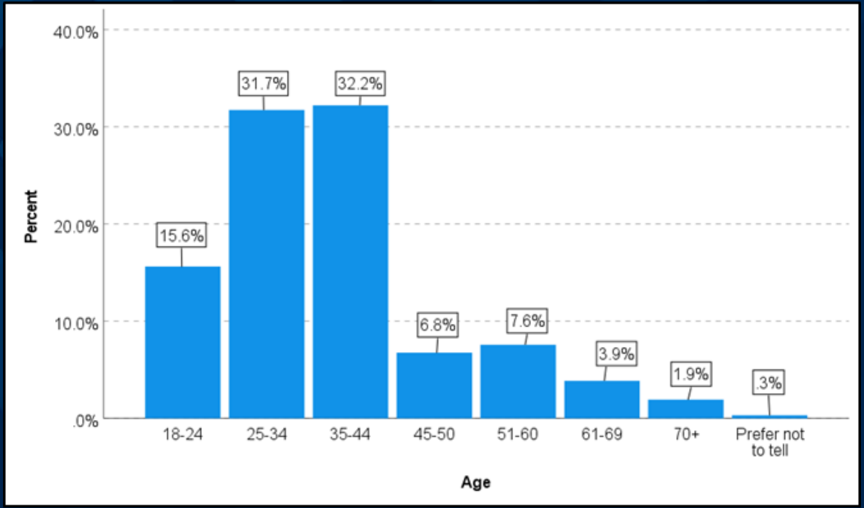
# Section 1: Background Information

- The majority of respondents were young, with 79.5% of them ranging between 18 and 44 years old

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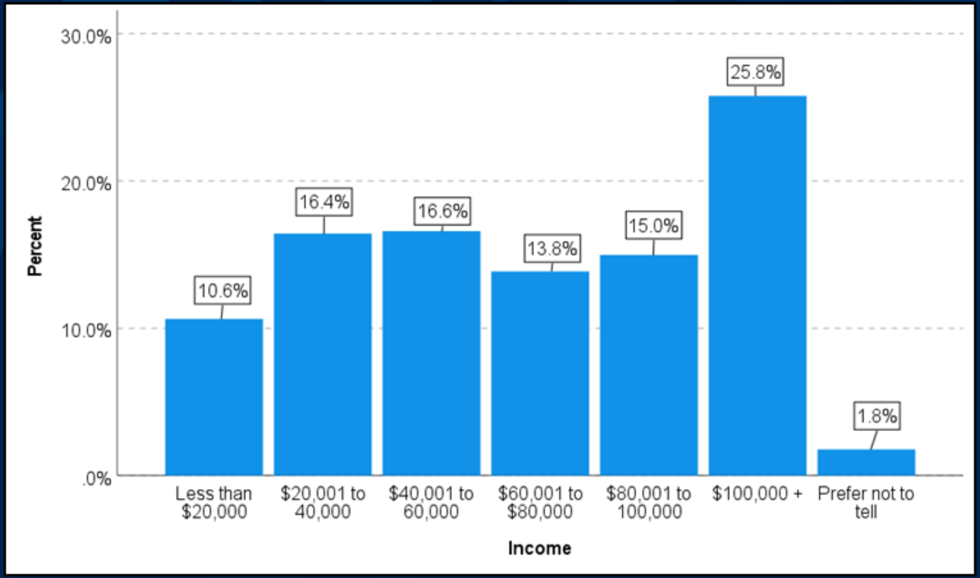
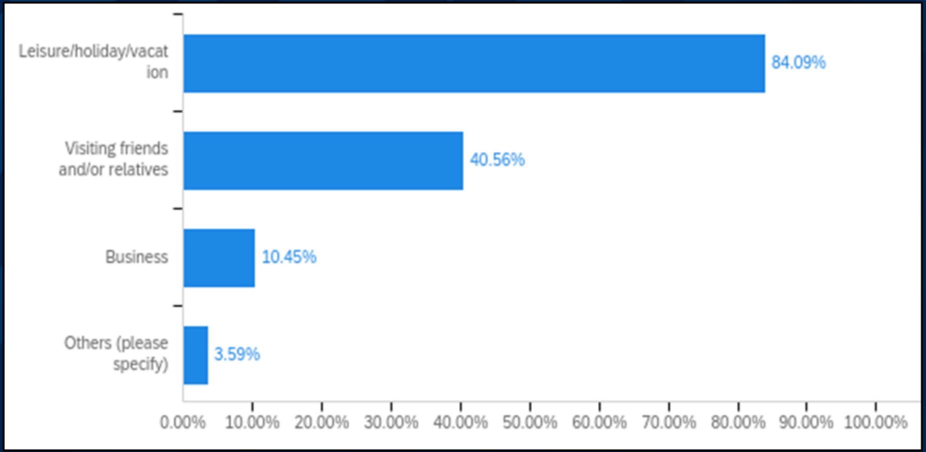
# Section 1: Background Information

- The majority of respondents (40.8%) reported an income of $80,001 or above



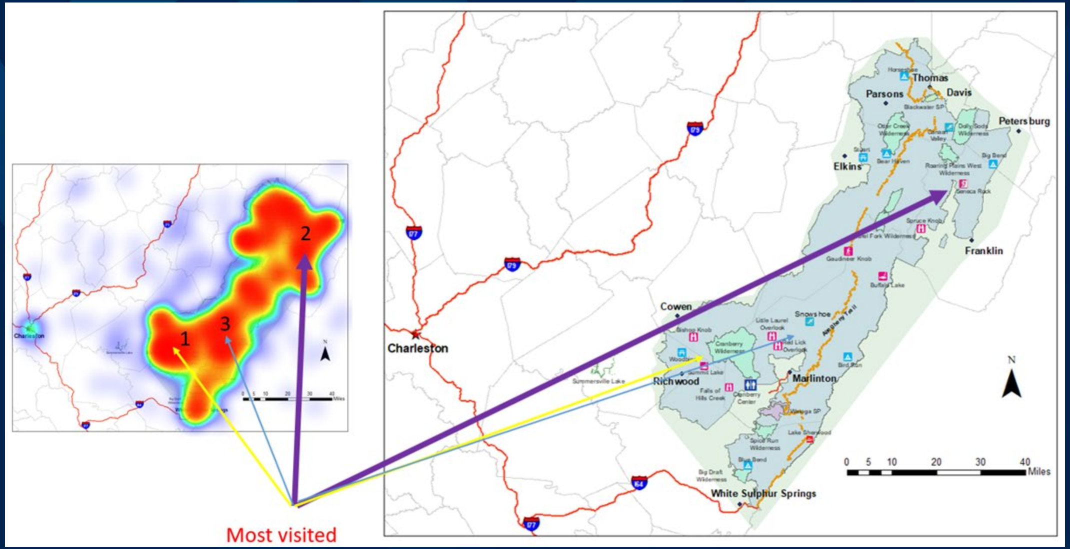
# Section 2: Trip Characteristics

- Most respondents (84.09%) traveled to the forest area for leisure/holiday/vacation, followed by visiting friends and/or relatives (40.56%), and business (10.45%)



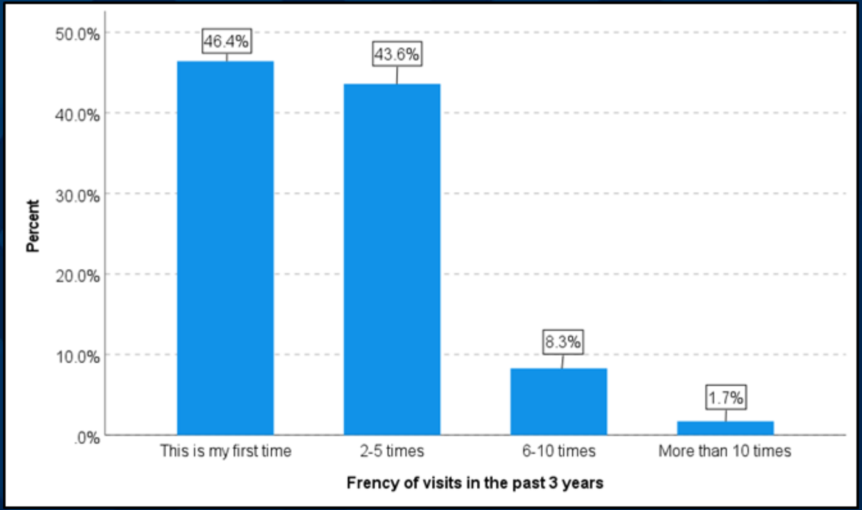
# Maximum 10 places visited

- Subregion 1 (Richwood and Cranberry Wilderness) was most visited (36.46%)
- Subregion 2 (Seneca Rock) (31.46%)
- Subregion 3 which is featured by Snowshoe and a segment of Highland Scenic Highway (27.71%)



# Section 2: Trip Characteristics

- A large number of respondents (46.4%) reported being the first time to visit the rea,

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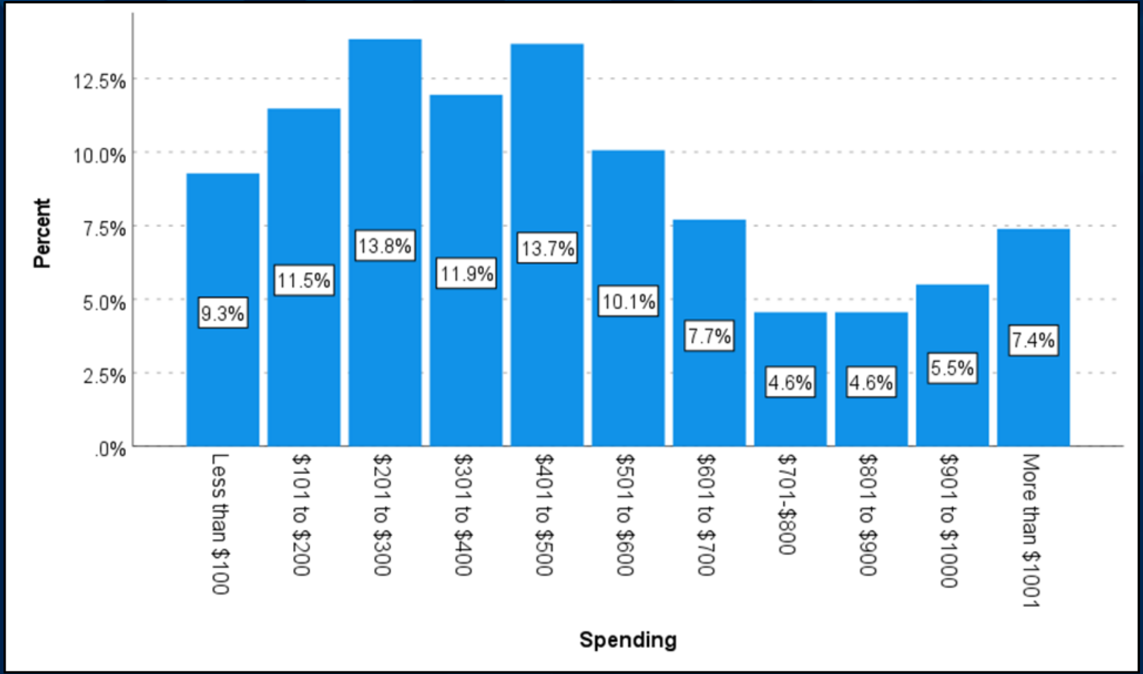
# Section 2: Trip Characteristics

- A good number of respondents spent over $600 per group/trip (29.8%) while 9.3% spent less than $100.

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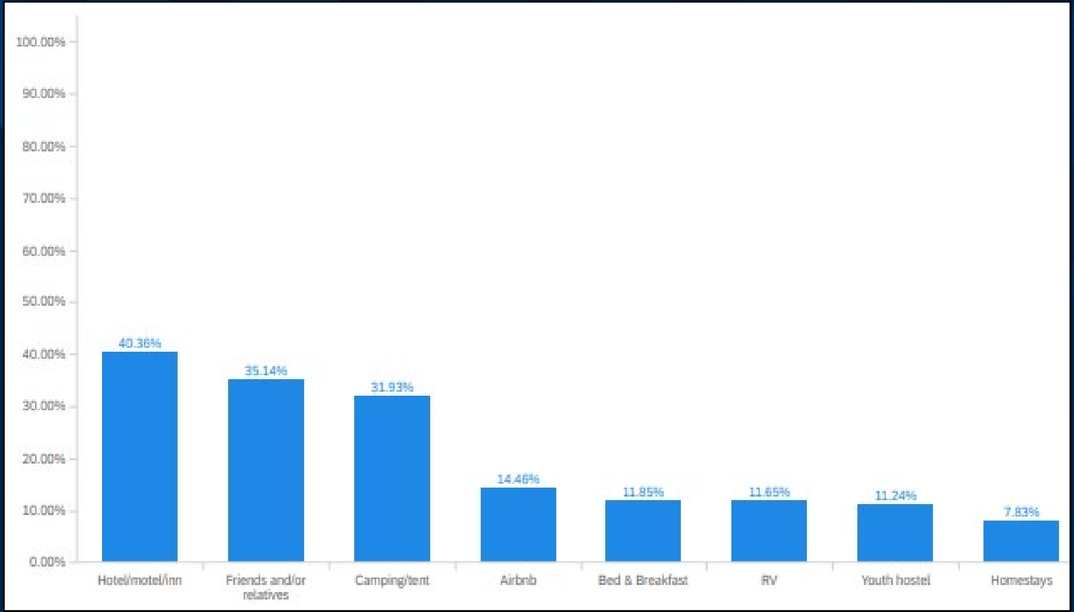
# Section 2: Trip Characteristics

- Most stayed in hotels/motels/inns (40.36%), followed by friends/relatives (35.14%), camping/tents (31.93%), and Airbnb (14.46%).

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# Section 4: Perceptions of Destination Images

- Highest:
  - Natural attractions
  - Conservation
  - Rural tranquility
- Lowest:
  - Lodging
  - Nightlife
  - Shopping
- Overall: very positive

| Items | Strongly disagree (SD) (%) | Mildly disagree (MD) (%) | Neutral (N) (%) | Mildly agree (MA) (%) | Strongly agree (SA) (%) | MA+ SA |
|---|---|---|---|---|---|---|
| 1. I was impressed by the natural attractions in the area | 2.5 | 2.9 | 6.8 | 32.2 | 55.6 | 87.8 |
| 9. The area is well maintained and conserved | 1.4 | 3.2 | 11.4 | 39.5 | 44.5 | 84.0 |
| 3. The area provides a good opportunity to experience rural tranquility and authenticity | 2.2 | 4.1 | 10.6 | 36.3 | 46.8 | 83.1 |
| 7. I felt secure and safe during my recent trip to the area | 2.5 | 3.5 | 10.9 | 38 | 45 | 83.0 |
| 12. Prices are reasonable | 1 | 5.2 | 13.6 | 42.3 | 37.9 | 80.2 |
| 13. The area provides diverse and quality outdoor recreational activities | 2.2 | 3.3 | 14.3 | 35.8 | 44.4 | 80.2 |
| 11. The area provides opportunities to experience local food/eatery | 1.9 | 4.1 | 15.2 | 42 | 36.8 | 78.8 |
| 4. Local residents are hospitable and friendly | 1.7 | 3.3 | 16.8 | 35.7 | 42.5 | 78.2 |
| 5. Local products are diverse and unique | 1.6 | 3.8 | 16.8 | 40.6 | 37.2 | 77.8 |
| 6. The area is easily accessible | 1.3 | 5.1 | 16.2 | 40.7 | 36.8 | 77.5 |
| 2. I was impressed by the heritage and cultural assets in the area | 1.6 | 4.4 | 17.3 | 36.5 | 40.3 | 76.8 |
| 15. The area is not crowded | 1.7 | 5.9 | 16.2 | 39.6 | 36.6 | 76.2 |
| 8. The area has enough and | 1.1 | 5.4 | 17.7 | 36.9 | 38.8 | 75.7 |
| 10. The area provides opportunities to experience | 2.2 | 4.8 | 21.9 | 37.4 | 33.8 | 71.2 |
| 17. The area has a wide choice of lodging | 1.9 | 5.1 | 22.8 | 40.3 | 30 | 70.3 |
| 14. The area provides good opportunities to enjoy entertainment and night life | 2.4 | 7.1 | 21.6 | 38.4 | 30.6 | 69.0 |
| 16. The area is good for shopping | 3 | 9.8 | 28.4 | 31.5 | 27.3 | 58.8 |
| 18. My overall image of the area was positive | 1.7 | 1.9 | 9 | 34.1 | 53.2 | 87.3 |

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# Section 5: Perceptions of Relative Competitiveness

- Most competitive :
  - Recreation
  - Rural tranquility
  - Local people
- Least competitive:
  - Festival/events
  - Crowding
  - Nightlife
  - Shopping
- Overall: 62.9%

| Items | Much worse (%) | Somewhat worse (%) | About the same (%) | Somewhat better (%) | Much better (%) | Last two combined |
|---|---|---|---|---|---|---|
| 13. Outdoor recreation opportunities | 1.4 | 3.7 | 30.7 | 35.1 | 29 | 64.1 |
| 3. Rural tranquility and authenticity | 2.6 | 4.6 | 29 | 37.1 | 26.7 | 63.8 |
| 4. Hospitability and friendliness of local people | 1.7 | 5.5 | 29.6 | 34.8 | 28.4 | 63.2 |
| 6. Accessibility | 2 | 6.9 | 28.4 | 32.2 | 30.5 | 62.7 |
| 12. Prices | 1.7 | 7.5 | 28.2 | 35.6 | 27 | 62.6 |
| 1. Natural attractions | 4.3 | 6.9 | 27.9 | 31.6 | 29.3 | 60.9 |
| 11. Local food/eatery | 1.7 | 7.5 | 29.9 | 30.7 | 30.2 | 60.9 |
| 2. Heritage and cultural assets | 3.4 | 6.3 | 31 | 37.9 | 21.3 | 59.2 |
| 8. Infrastructure | 2.3 | 6 | 32.5 | 32.2 | 27 | 59.2 |
| 5. Diversity and uniqueness of local products | 2.3 | 6.9 | 31.9 | 34.5 | 24.4 | 58.9 |
| 7. Security and safety | 2 | 4.3 | 35.1 | 27.9 | 30.7 | 58.6 |
| 9. Resource conservation | 2 | 7.2 | 32.2 | 32.5 | 26.1 | 58.6 |
| 17. Lodging | 2.9 | 6.3 | 33.6 | 30.7 | 26.4 | 57.1 |
| 10. Festivals and events | 1.4 | 8.6 | 33.3 | 28.2 | 28.4 | 56.6 |
| 15. Crowding | 1.4 | 8 | 33.9 | 31.9 | 24.7 | 56.6 |
| 14. Entertainment and night life | 2.6 | 6.6 | 34.5 | 29 | 27.3 | 56.3 |
| 16. Shopping | 1.4 | 9.2 | 38.2 | 27.3 | 23.9 | 51.2 |
| 18. Overall competitiveness | 1.7 | 7.5 | 27.9 | 36.2 | 26.7 | 62.9 |

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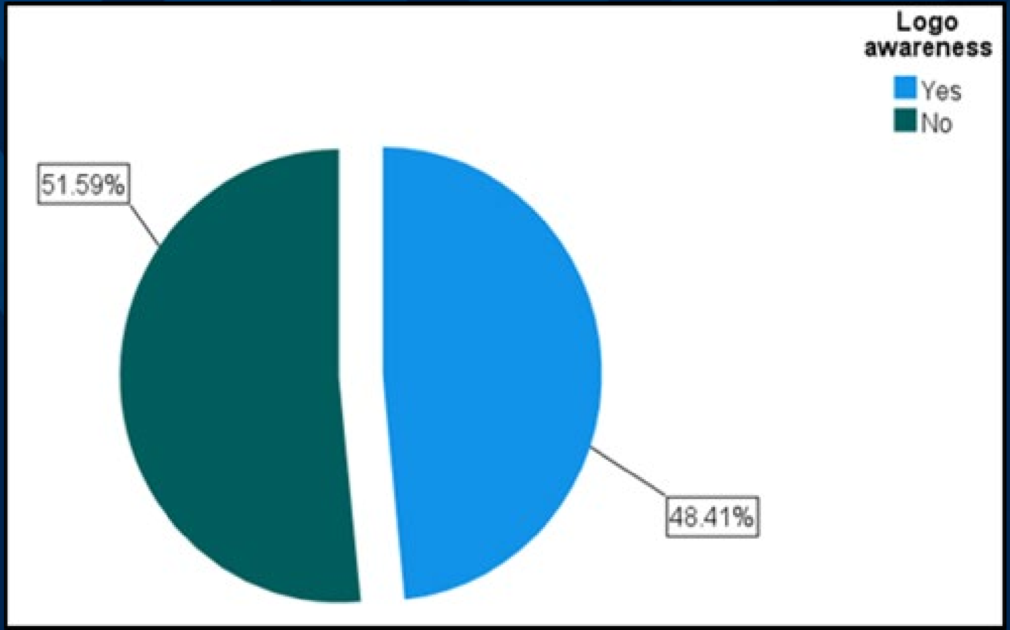
# Section 6: Perceptions of Branding



# Section 6: Perceptions of Branding

- Top three:
  - Interesting
  - Strong impression
  - Curiosity
- Bottom three (note: negatively worded):
  - Emotion
  - Appealing
  - Thinking

| Items | Strongly disagree (SD) (%) | Mildly disagree (MD) (%) | Neutral (N) (%) | Mildly agree (MA) (%) | Strongly agree (SA) (%) | MA+SA |
|---|---|---|---|---|---|---|
| 2. I find this brand interesting in a sensory way | 2.4 | 5.9 | 15.3 | 39.8 | 36.6 | 76.4 |
| 1. This brand makes a strong impression on my visual sense or other senses | 3.5 | 5.6 | 14.9 | 43 | 33.1 | 76.1 |
| 8. This brand stimulates my curiosity and problem solving | 3.7 | 9.7 | 21.6 | 36.7 | 28.3 | 65.0 |
| 4. This brand induces feelings and sentiments | 2.4 | 10.2 | 25.9 | 38.7 | 22.8 | 61.5 |
| 7. I engage in a lot of thinking when I encounter this brand | 4.3 | 9.6 | 27.6 | 33.4 | 25.1 | 58.5 |
| 6. This brand is an emotional brand | 5 | 12 | 29.6 | 27.5 | 26 | 53.5 |
| 5. I do not have strong emotions for this brand | 12 | 19 | 26.2 | 25.9 | 16.9 | 42.8 |
| 3. This brand does not appeal to my senses | 20 | 22.5 | 17.9 | 24.4 | 15.2 | 39.6 |
| 9. This brand does not make me think | 16.6 | 19.2 | 24.9 | 22 | 17.3 | 39.3 |

# Section 7: Destination Satisfaction

- Top three:
  - Natural attractions
  - Recreation
  - Rural tranquility
- Bottom three:
  - Festivals/events
  - Nightlife
  - Shopping
- Overall: 84.7%

| Items | Extremely dissatisfied (%) | Somewhat dissatisfied (%) | Neutral (%) | Somewhat satisfied (%) | Extremely satisfied (%) | Last two combined |
|---|---|---|---|---|---|---|
| 1. Natural attractions | 1.6 | 1.9 | 9.3 | 36.1 | 51.1 | 87.2 |
| 13. Outdoor recreation opportunities | 1 | 2.6 | 13.9 | 37.8 | 44.7 | 82.5 |
| 3. Rural tranquility and authenticity | 1.6 | 1.9 | 15.2 | 36.2 | 45 | 81.2 |
| 7. Security and safety | 1.6 | 3 | 14.6 | 37 | 43.8 | 80.8 |
| 9. Resource conservation | 1.3 | 2.6 | 16.2 | 38.3 | 41.7 | 80 |
| 4. Hospitability and friendliness of local people | 2.1 | 4 | 16.5 | 39.3 | 38.1 | 77.4 |
| 6. Accessibility | 0.8 | 4.2 | 17.6 | 39.1 | 38.3 | 77.4 |
| 2. Heritage and cultural assets | 1.1 | 3.8 | 17.8 | 41.8 | 35.4 | 77.2 |
| 12. Prices | 1.1 | 5.1 | 17.9 | 41.7 | 34.1 | 75.8 |
| 17. Lodging | 2.2 | 3.2 | 19.7 | 39.9 | 34.9 | 74.8 |
| 11. Local food/eatery | 1.6 | 4.3 | 19.4 | 39.4 | 35.3 | 74.7 |
| 5. Diversity and uniqueness of local products | 2.4 | 4 | 19.2 | 40.1 | 34.3 | 74.4 |
| 15. Crowding | 1.6 | 5.4 | 21 | 39.4 | 32.5 | 71.9 |
| 8. Infrastructure | 1.6 | 4 | 22.9 | 40.4 | 31.1 | 71.5 |
| 10. Festivals and events | 1.9 | 5 | 25.5 | 33.8 | 33.8 | 67.6 |
| 14. Entertainment and night life | 2.2 | 5.9 | 26.6 | 32.2 | 33 | 65.2 |
| 16. Shopping | 2.4 | 6.4 | 26 | 35.4 | 29.8 | 65.2 |
| 18. Overall experience | 1.6 | 2.1 | 11.5 | 35.7 | 49 | 84.7 |

# Section 8: Perceptions of the Impacts of COVID-19 Pandemic

- Top three:
  - Travel preferences/behaviors
  - Safety/hygiene
  - New forms of tourism

- Bottom three:
  - Less likely to be contracted with COVID-19
  - COVID-19 cases affecting travel intention
  - Recreation economy never come back

| Items | Strongly disagree (SD) (%) | Mildly disagree (MD) (%) | Neutral (N) (%) | Mildly agree (MA) (%) | Strongly agree (SA) (%) | MA+ SA |
|---|---|---|---|---|---|---|
| 8. People's travel preferences and behaviors have been changed due to the pandemic | 1.9 | 3.4 | 20.8 | 35.9 | 38 | 73.9 |
| 13. People will care about safety and hygiene while travelling more than they used to due to the pandemic | 2.4 | 4.5 | 19.5 | 36.1 | 37.5 | 73.6 |
| 10. New forms of tourism may emerge in the forest area due to the pandemic | 2.9 | 4.2 | 24.6 | 41.5 | 26.7 | 68.2 |
| 1. Covid-19 reduces the possibility of travelling with groups | 7.6 | 6.9 | 17.7 | 38.2 | 29.6 | 67.8 |
| 12. Recreation/tourism in the forest area will end up being more resilient and sustainable post the pandemic | 2.6 | 4.8 | 25.8 | 43 | 23.8 | 66.8 |
| 5. The Monongahela National Forest will become more popular for city dwellers post the COVID-19 pandemic | 2.3 | 6.8 | 24.3 | 39.9 | 26.7 | 66.6 |
| 14. COVID-19 increases the possibility of travelling alone or with family | 3.9 | 7.7 | 23.7 | 36.9 | 27.9 | 64.8 |
| 6. People may choose to stay in Airbnb over hotels/motels while traveling to the forest area during the pandemic | 3.4 | 6.9 | 28.7 | 37 | 24 | 61 |
| 15. Number of COVID-19 cases in the forest area may increase with influx of tourists | 4.2 | 8.5 | 29.3 | 37 | 20.9 | 57.9 |
| 7. Camping has become more popular across the U.S. due to the pandemic. This popularity may fade away post the pandemic | 3.1 | 11.8 | 28.2 | 33.8 | 23.2 | 57 |
| 2. I prefer to avoid traveling to urban areas due to COVID-19 pandemic | 9.7 | 11.8 | 22.5 | 35.1 | 20.9 | 56 |
| 9. Tourism in the forest area was hit hard by the pandemic | 3.7 | 9.7 | 31.1 | 31.7 | 23.8 | 55.5 |
| 4. There is a low likelihood of contracting COVID19 when travelling to the Monongahela National Forest area | 6.1 | 8.7 | 30 | 30.6 | 24.6 | 55.2 |
| 3. Number of daily COVID-19 cases is a key factor that affects my intention to travel to the Monongahela National Forest | 10.8 | 9.5 | 27.1 | 30.8 | 21.9 | 52.7 |
| 11. Recreation economy/tourism industry in the forest area will never come back to the pre-pandemic level | 10 | 19.2 | 27.4 | 25.8 | 17.7 | 43.5 |

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# Section 9: Destination Loyalty

| Items | Yes (%) | No (%) |
|---|---|---|
| 2. I have said something positive about the area since my most recent trip to the area | 84.5 | 15.5 |
| 1. I have recommended the area to my friends and family since my most recent trip to the area | 81.3 | 18.7 |
| 3. I have made a plan to visit the area again since my most recent trip to the area | 70.2 | 29.8 |

I have …

| Items | Strongly disagree (SD) (%) | Mildly disagree (MD) (%) | Neutral (N) (%) | Mildly agree (MA) (%) | Strongly agree (SA) (%) | MA +SA |
|---|---|---|---|---|---|---|
| 2. I will say something positive about the area | 2.1 | 3.5 | 8.2 | 33.3 | 52.8 | **86.1** |
| 1. I will recommend the area to my friends and family | 3.1 | 2.6 | 9.3 | 36.6 | 48.5 | **85.1** |
| 3. I will visit the area again | 1.9 | 2.7 | 11.6 | 30.6 | 53.1 | **83.7** |

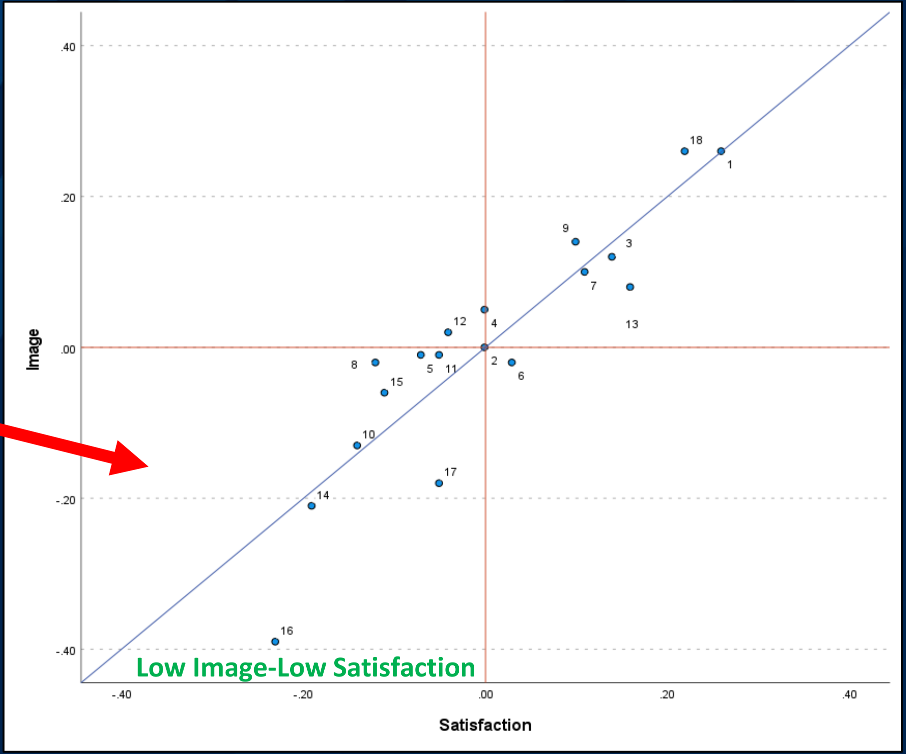
I will …

# Gap Analysis of Image, Competitiveness, and Satisfaction

Low images (below the mean value):

- Diversity and uniqueness of local products (item 5)
- Infrastructure (item 8)
- Festivals and events (item 10)
- Local food/eatery (item 11)
- Entertainment and night life (item 14)
- Crowding (item 15)
- Shopping (item 16)
- Lodging (item 17)

Related to lower level of satisfaction

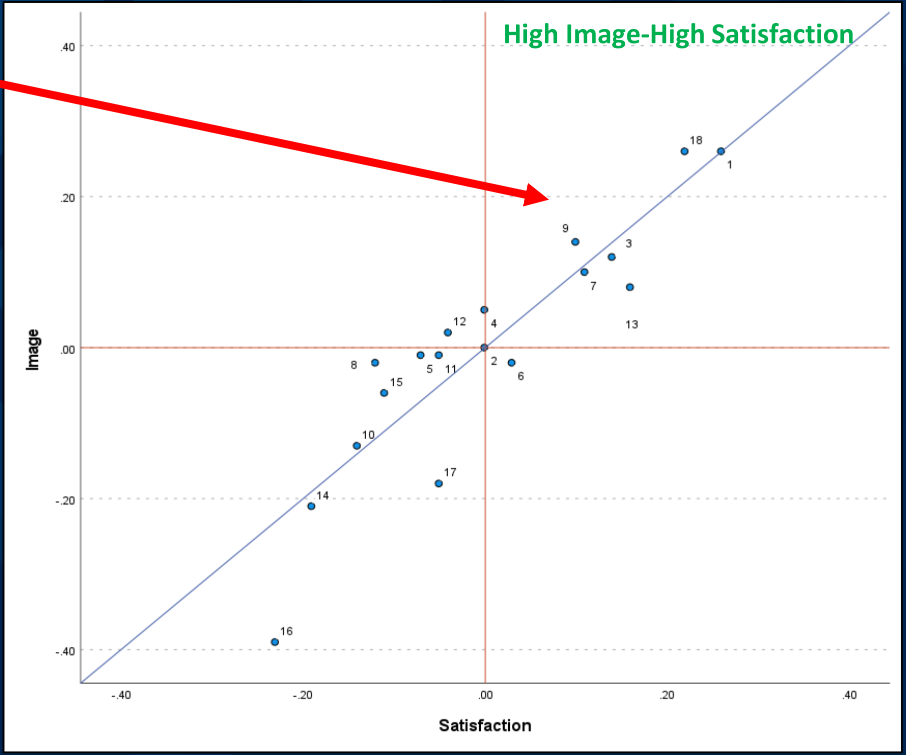


# Gap Analysis of Image, Competitiveness, and Satisfaction

High images (above the mean value):

- Natural attractions (item 1)
- Rural tranquility and authenticity (item 3)
- Security and safety(item 7)
- Resource conservation(item 9)
- Outdoor recreation opportunities(item 13)
- Overall experience vs. overall image (item 18)

Related to higher level of satisfaction

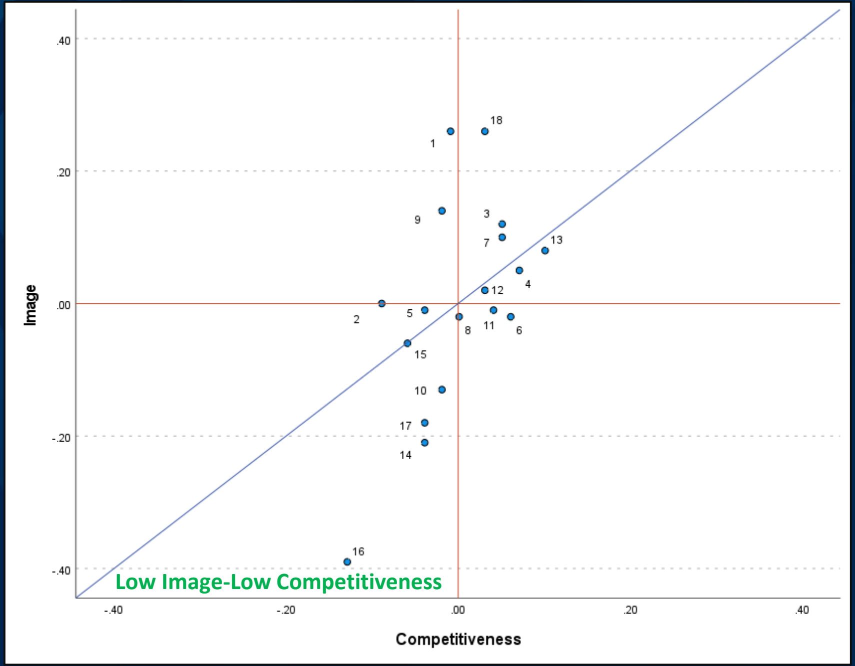


# Gap Analysis of Image, Competitiveness, and Satisfaction

Low images (below the mean value):

- Diversity and uniqueness of local products (item 5)
- Festivals and events (item 10)
- Entertainment and night life (item 14)
- Shopping (item 16)
- Lodging (item 17)

Related to low level of competitiveness

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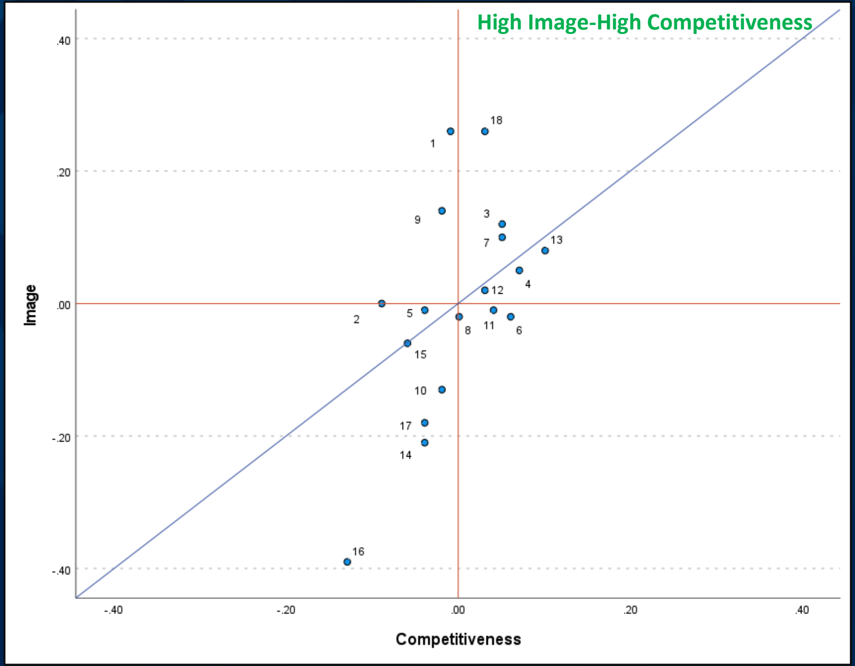
# Gap Analysis of Image, Competitiveness, and Satisfaction

High images (above the mean value):

- Rural tranquility and authenticity (item 3)
- Hospitability and friendliness of local people (item 4)
- Security and safety (item 7)
- Prices(item 12)
- Outdoor recreation opportunities (item 13)
- Overall (item 18)

Related to high competitiveness

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Thanks!

Questions/comments

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