

Appalachian Trail Conservancy

# Harlem Valley Outdoor Recreation Economic Assessment

Research Summary



Prepared by  
The Harbinger Consultancy  
February 2020

# Contents

About this Study .....	3
Study Area .....	4
Travel and Tourism Context .....	5
Socioeconomic and Demographic Context .....	5
Outdoor Recreation Visitor Markets .....	8
The Outdoor Recreation Landscape and Economy .....	24
Economic Values of Outdoor Recreation and Natural Assets .....	33
Potential Outdoor Recreation Economic Development Projects & Initiatives .....	36
References .....	39
Other Sources of Data, Information and Insight .....	40
Appendix A: Outdoor Recreation & Related Points of Interest .....	42

Produced by The Harbinger Consultancy for the Appalachian Trail Conservancy and the Harlem Valley Appalachian Trail Community, in partnership with Pawling Community Foundation and Solutions for a Better Dover.

Principal author: Michele L. Archie, The Harbinger Consultancy  
Contributing author: James Dion, Destination Solutions LLC  
Maps: Tatiana Magee, Appalachian State University

Thank you to more than 70 residents, business owners, nonprofit leaders, government staff and elected officials for supporting the study and contributing hours of your time, data, and insights—and for your enthusiastic commitment to the valley you share. Thank you also to Stacy DuHamel, co-chair Harlem Valley A.T. Community and project manager; for her leadership, dedication to large landscape conservation and commitment to sustainable economic development along the Appalachian Trail.

Special thanks to Dutchess County leadership for unwavering support: Marcus J. Molinaro, County Executive; Brad Kendall, County Clerk; Mary Kay Vrba, President and CEO, Dutchess Tourism Inc.; and Eoin Wrafter, Commissioner, Planning & Development. Thanks also to Appalachian Trail Conservancy leadership from Laura Belleville, Julie Judkins and Dennis Shaffer.

Finally, a note of appreciation for Suzanne Dixon, former ATC President and CEO, without whose vision and leadership this report and the collaboration and good work it has promoted in support of outdoor recreation-driven economic development in the Harlem Valley would not have been realized.



## Cover photos

Clockwise from top left: Old Drovers Inn (photo: Old Drovers Inn). Volunteer trail maintenance crew on National Public Lands Day, 2019 (photo: Melissa Goodwin). Brookby Farm (photo: Brookby Farm). Kayakers on the Ten Mile River (photo: Ryan Coveney).

## About this Study

The Harlem Valley Appalachian Trail Community outdoor recreation economic assessment was designed to generate a deeper understanding of the outdoor recreation-related economy, yielding insights that support development and implementation of initiatives to benefit local communities, businesses and residents.

In particular, the assessment considered:

- Visitor markets and local recreational use that point to marketing and promotion targets now and in the future, as well as to infrastructure and other improvements that would encourage more economic activity spurred by outdoor recreation.
- Specific opportunities for new, enhanced or connected services to appeal to existing and untapped markets, including ways to connect outdoor recreation with agritourism, education, arts, culture and history and other parts of the local economy.
- A range of economic values associated with outdoor recreation and natural assets that may help support a broader argument for conservation and protection of outdoor recreation assets and the open space and viewsheds they depend on.

The intent of this study is to begin to create a conceptual “map” of the outdoor recreation economy that can undergird a long-term approach to economic development and conservation, and advance specific, practical initiatives. The process of conducting the study was designed to identify and help cultivate cross-sector relationships that can support responsible use, development and promotion of the Harlem Valley’s outdoor recreation and conservation resources.

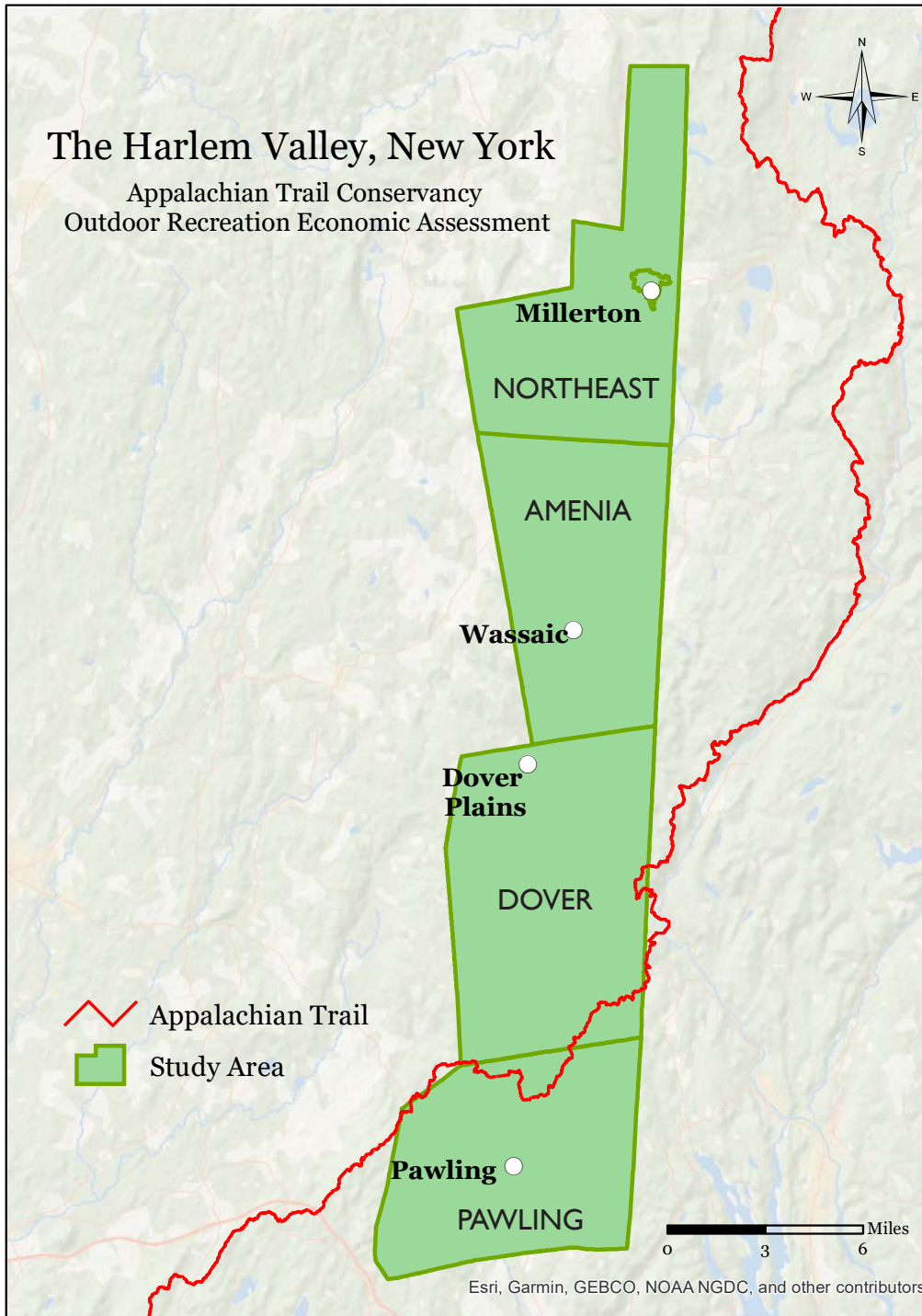


The Harlem Valley is located approximately 80 miles north of New York City, and is connected to the city by Metro-North Railroad.

The Harlem Valley Appalachian Trail Community outdoor recreation economic assessment aims to generate a deeper understanding of the outdoor recreation-related economy. Its intent is to yield insights that help support

sustainable economic development and implementation of initiatives to benefit local communities, businesses and residents while promoting conservation of the area's natural, cultural and historical assets.

## Study Area



The Appalachian Trail Conservancy  
and the Harbinger Consulting Group  
Author: Tatiana Magee

Source: Audubon Society, Dutchess County Planning Dept., NYS GIS Clearinghouse

# Travel and Tourism Context

Travel and tourism are important parts of the Dutchess County economy. In 2016, employment in industries that include travel and tourism-related accounted for 14.8% of jobs in the county (*Headwaters Economics*). This is on par with the 15.8% of U.S. jobs in these industries (retail trade; passenger transportation; arts, entertainment and recreation; and accommodation and food). While Dutchess County’s travel and tourism sector is strong, the county is not disproportionately dependent on these industries.

From 1998 to 2016, travel and tourism employment in Dutchess County grew 43.5%. Employment outside those industries grew 12.7%. (*Headwaters Economics*)

It is difficult to pin down the economic influence of travel and tourism-related industries in the Harlem Valley, a subset of the county. Approximately six percent of Dutchess County residents live in the Harlem Valley. (*U.S. Census Bureau*) The Harlem Valley shares 10.9% of the county’s lodging inventory with the northern part of the county (*Young Strategies Inc. 2018*) and has a strong share of the short-term-rental market. The rough alignment of these percentages suggests that travel and tourism may have a similar influence in the Harlem Valley as in Dutchess County as a whole. The uneven and overall low quality of lodging was identified by local stakeholders as a barrier to growth in other parts of the tourism sector.

Seasonal and recreational housing (weekend or second homes) has also been expanding, growing from three percent of all housing units in Dutchess County in 2005 to four percent in 2017, mirroring the four percent share of seasonal housing in the United States as a whole.

Three of the four towns of the Harlem Valley have a higher proportion of seasonal and recreational housing than the four percent county average. These part-time residents could be an important “local” market for services and experiences, e.g., guides, evening activities and interesting restaurants. In 2017, the percentages of these occasional use homes by town follows.

Amenia 6.1%	Dover 3.7%
North East 21%	Pawling 6.4%

(*U.S. Census Bureau, American Community Survey*)



A.T. thru-hikers, Dawn and Akuna, photographed as part of the [Harlem Valley A.T. Hikers Portraits](#) project. (Photo: Justin P. Goodhart)

## Socioeconomic & Demographic Context

Between 2010 and 2017, Dutchess County experienced a slight population loss of 0.2%, while the U.S. as a whole gained 5.6%. Population declined in most of Harlem Valley’s four towns more significantly than in the county as a whole.

Amenia -2.0%	Dover -2.4%
North East -1.1%	Pawling -0.1%

While this may seem to be dismal news, the population decline in Dutchess County and in Harlem Valley towns is less than in other non-metropolitan areas of New York State. On average, these areas lost 5.5% of their population in the same time period. Across all of these areas, population loss appears to be concentrated among young families, with the highest rates of decline in the 35-44 and under 18 age brackets. (*Headwaters Economics Demographics*)

Closer to home, some Dutchess County neighbors lost population while others gained. Most adjacent counties lost population from 2010-2018: Columbia, NY (-5%), Litchfield, CT (-2.1%), Putnam, NY (-0.8%) and Ulster, NY (-2.1%). Fairfield County (CT) and Orange County (NY) counties both gained population, up 2.9% and 2.4% respectively. (*U.S. Census Bureau*)

The Harlem Valley population is older than that of Dutchess County as a whole, where the median age is 41.8, and of the U.S. where it is 37.8. On average, the median age in the four towns is more on par with that of non-metropolitan New York State as a whole (45.3 years).

Amenia 45.8	Dover 43.4
North East 44.1	Pawling 45.9

(*Headwaters Economics Demographics*)

The Harlem Valley is significantly less diverse than the U.S., where the “white only” racial category accounts for 73% of the population, and Dutchess County (78.6% white). On average, the four Harlem Valley towns are 89.5% white, 3.7% black or African American, 1.4% Asian, 3.1% “other” single race, and 2.2% mixed race. On the whole, the Harlem Valley is more diverse than all of non-metropolitan New York State, where whites are 94.3% of the population.

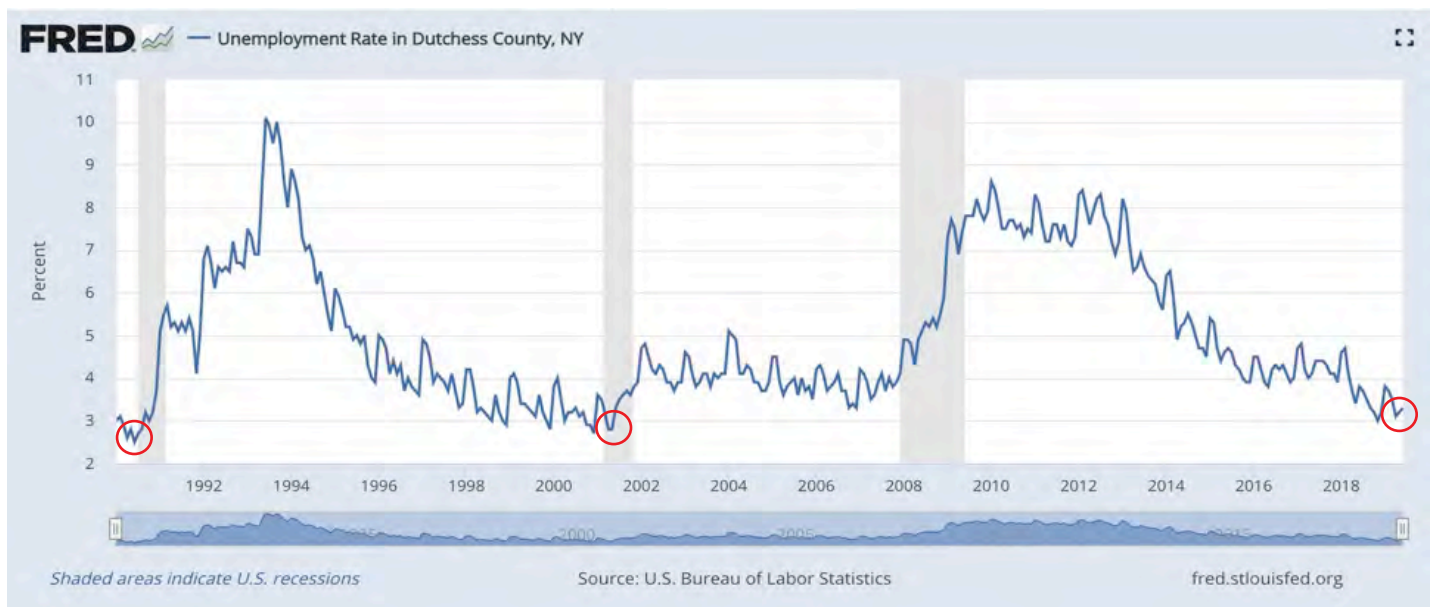
Latinos account for 11.9% of the Harlem Valley population, on par with Dutchess County (11.7%). The Latino population is proportionally smaller than the U.S. (17.6%), but much larger than in non-metro New York State (3.3%). By town, Latino population:

Amenia 5.4%
Dover 15.4%
North East 16.2%
Pawling 10.0% ( <i>ibid.</i> )

The Native American population in the Harlem Valley is reported at 0.0% (compared to 0.4% in Dutchess County and 0.5% in the U.S.). (*ibid.*) The Schaghticoke First Nations people traditionally lived in the Harlem Valley and are culturally associated with the area, but it is not clear whether or to what extent the fact that the tribe is not formally recognized may result in under-reporting of the valley’s native population.

Among the reasons cited in local media for the exodus of residents that is leading to a population decline are a shortage of jobs in Dutchess County and a high cost of living. (*See, for example, Purcell 2016.*)

As is the case across much of the United States, unemployment rates are near their historic lows since the late 1980s, as the graph below shows. (*Headwaters Economics Demographics*)



This Dutchess County unemployment graph, produced by the St. Louis Federal Reserve Bank, shows that the county’s current low unemployment rates are not unprecedented.

The Harlem Valley is home to a disproportionate number of residents who commute outside the county to work. About half of Harlem Valley workers are employed in Dutchess County, while half commute to jobs outside the county. By contrast, two-thirds of Dutchess County employees and seven in ten U.S. employees work in their county of residence. (*ibid.*) About 16% of Dutchess County commuters work in Westchester County, NY. (*U.S. Census Bureau Commuting Survey*)

Data compiled by the Massachusetts Institute of Technology suggest that the living wage in Dutchess County for a single adult is \$13.62/hour, and \$20.61 for two working adults supporting two children. This is 10-12% higher than in neighboring Ulster and Columbia counties, but 28% lower than in Putnam County to the south. (*MIT Living Wage*)

Housing is less affordable in Dutchess County than it is in the U.S. and in non-metropolitan New York State as a whole. It is similarly challenging for Harlem Valley homeowners and renters to afford their homes. (*Headwaters Economics Demographics*)

	Ownership cost >30% household income, 2017	Renting cost >30% household income, 2017
<b>Harlem Valley</b>	41.8%	47.2%
<b>Dutchess County</b>	38.1%	51.4%
<b>Non-metro New York State</b>	28.6%	39.4%
<b>United States</b>	29.3%	46.8%

Median household income varies dramatically across the Harlem Valley, with two towns exceeding the U.S. average and two towns falling below it. Median household income in Dutchess County outstrips both the U.S. average and the average for non-metropolitan New York State. (*ibid.*)

	Median household income, 2017
<b>Harlem Valley towns</b>	
<b>Amenia</b>	\$53,736
<b>Dover</b>	\$53,617
<b>North East</b>	\$60,536
<b>Pawling</b>	\$82,328
<b>Dutchess County</b>	\$75,585
<b>Non-metro New York State</b>	\$62,930
<b>United States</b>	\$57,652

In 2017, poverty was somewhat more prevalent in the Harlem Valley (10.6%) than it was in Dutchess County (9.1%). In 2017, the U.S. Department of Health and Human Services set the federal poverty line at an annual income of \$12,060 for an individual and \$24,600 for a family of four. The Town of Dover (14.6%) had the highest rate of individuals with incomes below the federal poverty line among Harlem Valley communities, matching the national average. (*ibid.*)

Harlem Valley employment is dominated by four industry sectors that account for approximately 60% of private employment:

Education, health care & social assistance	25.5%
Retail trade	13.2%
Professional, management, administration & waste management	11.4%
Construction	10%

Employment in the tourism-related arts, entertainment, recreation, accommodations and food sector is slightly less concentrated in the Harlem Valley (8.6%) than in Dutchess County (9.2 %) and the U.S. as a whole (9.7%). (*Headwaters Economics Demographics*)

# Outdoor Recreation Visitor Markets

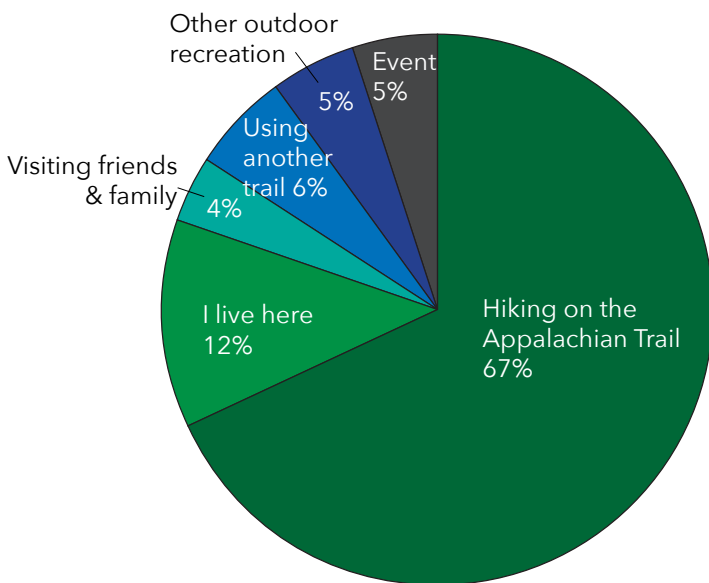
Two visitor surveys provide a foundation for an analysis of Harlem Valley visitor markets, and more specifically, outdoor recreation users and visitors:

- An ongoing Harlem Valley outdoor recreation user and visitor survey that has yielded 312 online and hiker intercept responses. Of these, 40% were intercept surveys completed by Appalachian Trail hikers.
- Dutchess Tourism Inc. (DTI) summer 2018 visitor survey. Young Strategies, Inc., the DTI survey contractor, incorporated questions to enable separate analysis of Harlem Valley visitors and residents and focus on outdoor recreation activities and destinations.

## Harlem Valley Outdoor Recreation Survey

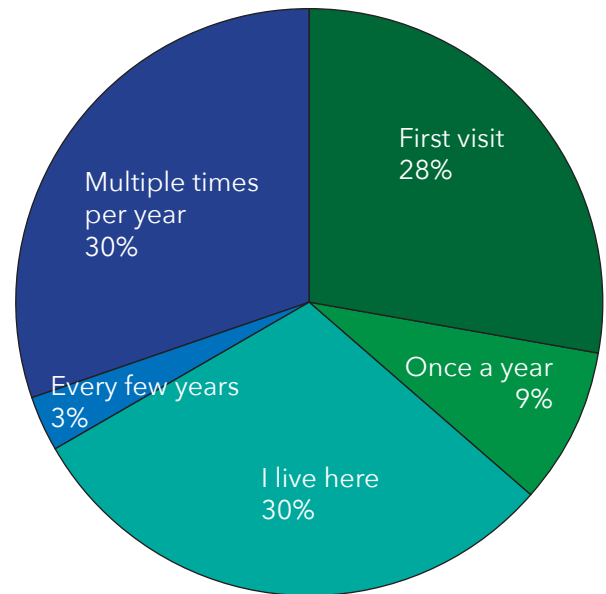
The survey, which remains open for further data collection, asked about respondents' primary reason for visiting the Harlem Valley. Unsurprisingly, given the preponderance of hiker intercept surveys, hiking on the A.T. is the most common reason for visiting.

## What is Your Primary Reason for Visiting the Harlem Valley Today?



In response to the question of how frequently they visit the Harlem Valley, 88% of survey respondents were divided among three main categories: frequent visitors, first-time visitors, and residents. Fewer visitors fall into the “once a year” or “every few years” categories. This breakdown is similar to findings from other rural, recreation areas similarly surveyed, especially with large urban markets nearby.

## How Frequently Do You Visit the Harlem Valley?



Caleigh Christie collects an outdoor recreation survey response from a thru-hiker at HVATC's Trail Magic event, 2018. (Photo: Stancy DuHamel)

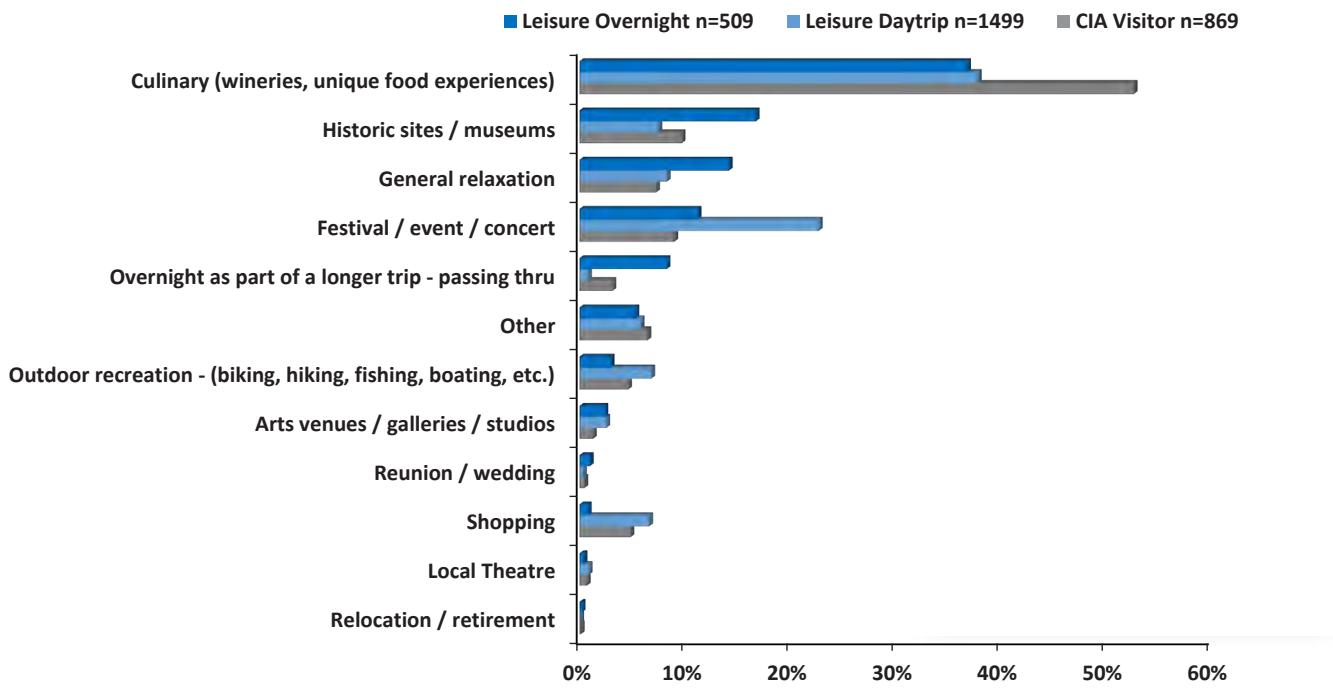


The Dutchess Tourism visitor survey sheds light on why, more generally, travelers visit Dutchess County. In the county as a whole, leisure travelers are motivated most strongly by the county's food and wine offerings. Outdoor recreation was the primary motivation for fewer than 10% of survey respondents. The DTI survey was promoted through a variety of channels, including to Culinary Institute of America (Hyde Park) program attendees. Their responses are reported in a separate category (CIA) from leisure daytrip and overnight visitors in the charts that follow.

Despite its relatively low draw as a primary trip motivation, there is evidence that outdoor recreation and the natural areas where it occurs are important to Dutchess County visitors. The chart on the following page shows that natural beauty and scenery, and outdoor recreation and parks rank second and third in important characteristics for the selection of destinations for getaways and vacation destinations.

### Dutchess County Visitor Survey: Primary purpose of most recent leisure trip to Dutchess County

- Observations:**
- Of those that responded they came to Dutchess County for a leisure trip purpose, the majority of overnight (37%) and CIA Visitors (53%) reported traveling for a culinary experience as their primary leisure trip purpose followed by historic sites and museums.
  - Leisure daytrip respondents reported primary trip purposes including experiencing Dutchess County culinary followed by a festival/event/concert.



Young Strategies Inc. 2018

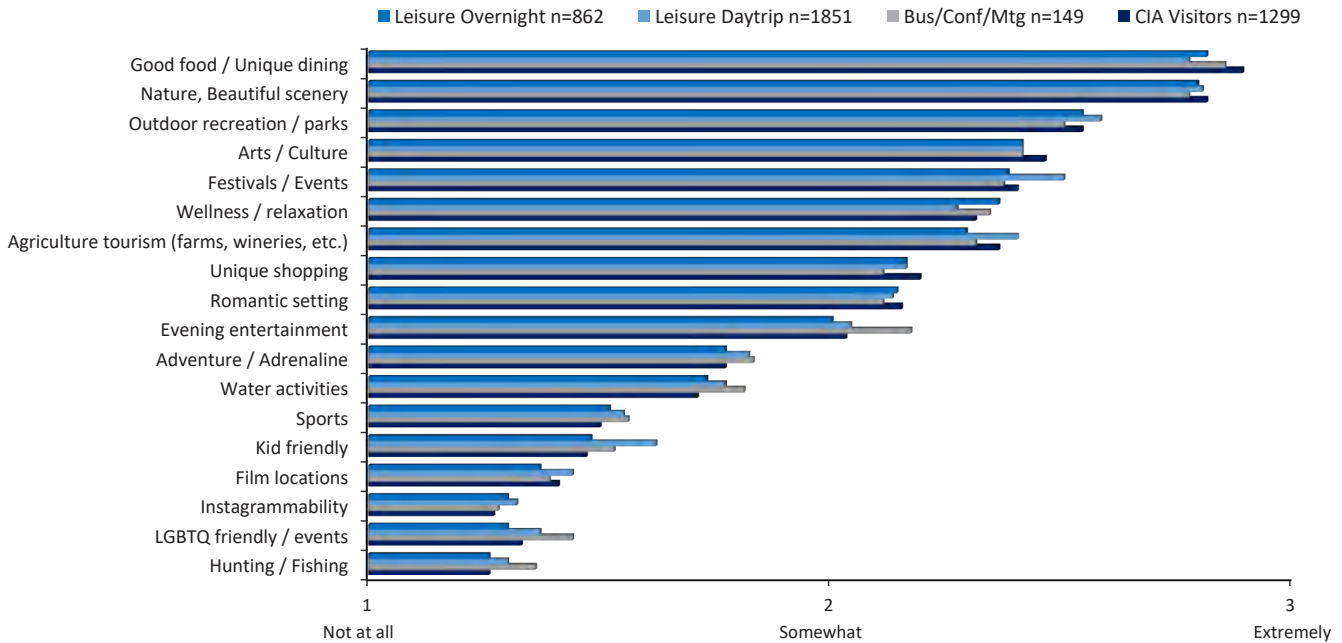


Vineyards at Millbrook Vineyards and Winery. (Photo: Millbrook Vineyards and Winery)

## Dutchess County Visitor Survey: Level of importance of attributes in vacation/getaway destination

**Observations:**

- The majority of respondents across all segments report good food/unique dining followed by nature, beautiful scenery as the most important attributes when selecting a getaway / vacation destination. This data is positive news for Dutchess County as they are a first-class culinary and scenic destination.



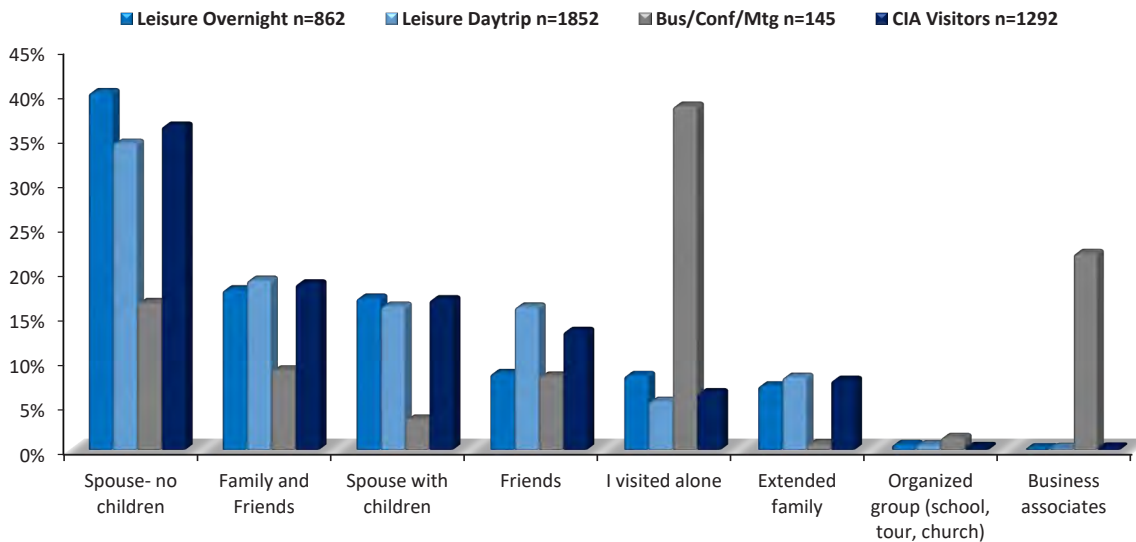
Young Strategies Inc. 2018

### Who is Traveling?

The Harlem Valley survey respondents were traveling primarily with small groups of family or friends, with an average party size of 2.5. Very few were traveling with children, with an average of only .39 children per party.

These characteristics fit with the findings of the Dutchess Tourism visitor survey, which found that the majority of visitors to the county were traveling with their spouse or friends and family without children.

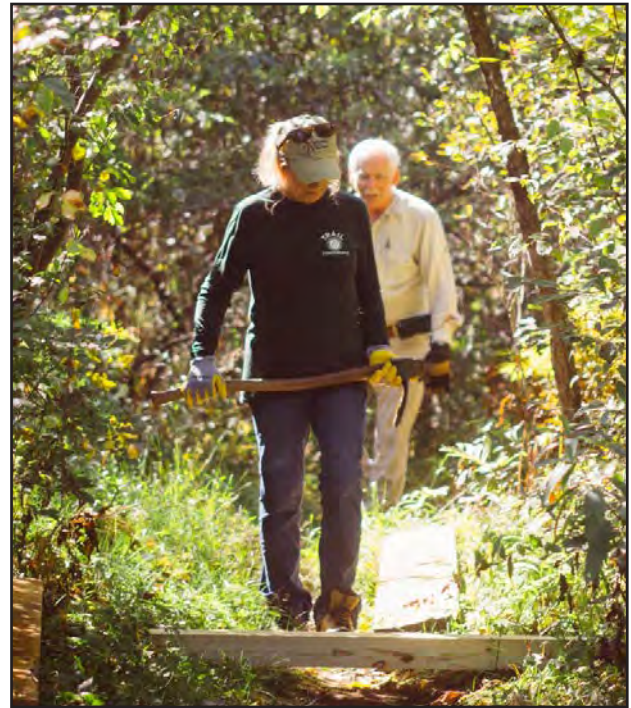
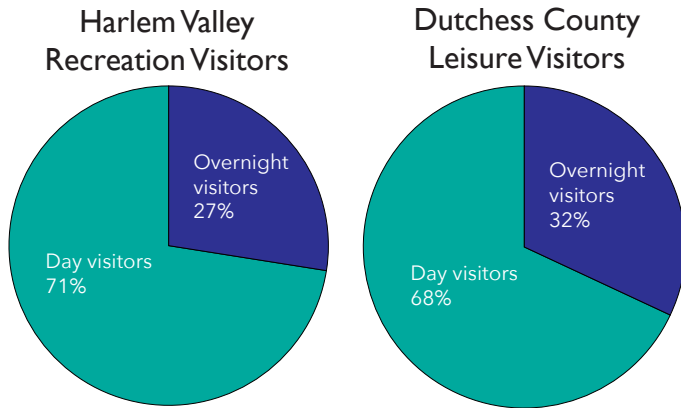
### Dutchess County Visitor Survey: Who are you traveling with on this trip to Dutchess County?



Young Strategies Inc. 2018

The Harlem Valley and Dutchess County surveys both reported a preponderance of day trips. Overnight visitors accounted for roughly one-third of all Dutchess County leisure visitors. The Harlem Valley recreation survey, influenced by the large percentage of part-time and full-time residents captured in hiker intercept survey, found a slightly lower proportion of overnight visitors—just over a quarter.

### Day and Overnight Visitors



Donna Briggs Chapman and Ron Rosen construct a section of puncheon along the A.T. during National Public Lands Day, 2019. (Photo: Charles Flores)



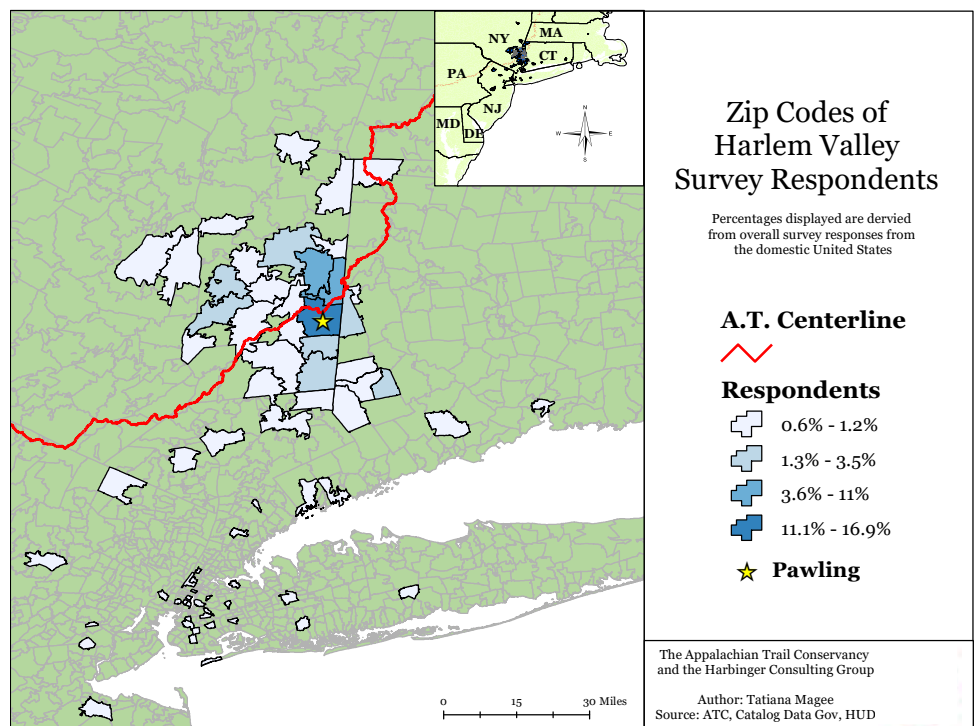
The Scott family, representing Boy Scouts of America Troop 34, Dover and Pawling, intercept A.T. hikers to complete visitor surveys during HVATC's Trail Magic event, 2018. (Photo: Tom Walogorsky)



The Harlem Valley is rich in scenic beauty, an important draw for visitors. Cat Rocks along the Appalachian Trail in Pawling offers a stunning overlook of the valley. (Photo: Julian Diamond)

## Where Harlem Valley Survey Respondents Live

Most respondents to the Harlem Valley survey live in the immediately surrounding area, including nearby parts of New York, Connecticut and New Jersey. The zip codes highlighted on the map below account for 84% of survey respondents. Respondents from outside of this area hailed from 16 U.S. states and eight foreign countries, mostly in Europe.

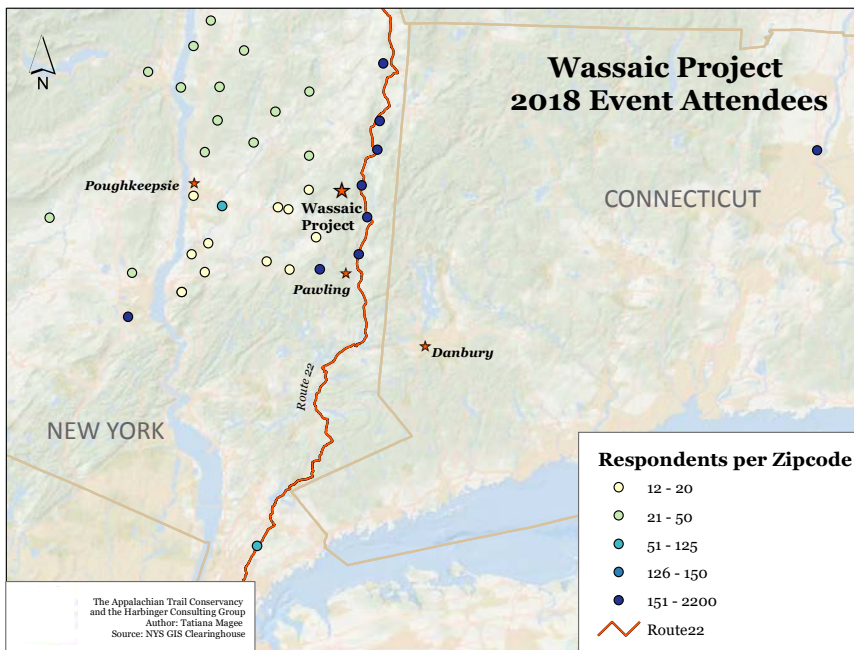


Data from three Harlem Valley businesses and organizations that serve visitors offer a base for comparison. Crown Maple is a maple syrup producer that formerly operated a visitor center and hiking trails on its property. When its visitor facilities were open, Crown Maple served a broad regional market, with most day-trip and overnight visitors hailing from Connecticut, Massachusetts, New Jersey and New York.

the Harlem Valley visitor market is strongly concentrated in the immediately surrounding region in New York and Connecticut, with significant representation from New York City.

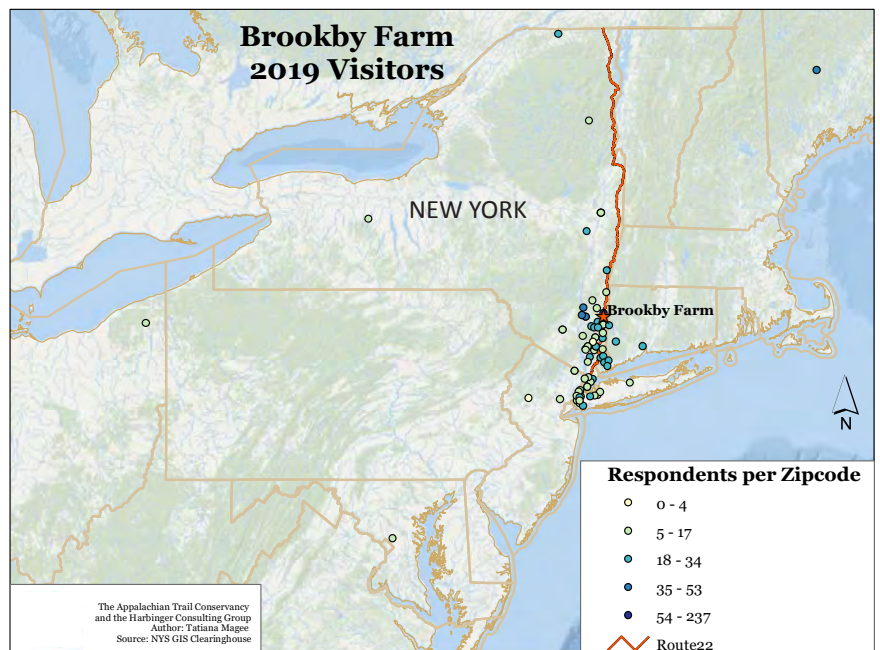
Visitor zip code data from Brookby Farm (a dairy farm with an onsite farm store) and the Wassaic Project (an arts and cultural organization) are represented on the maps on this page. These data support the finding that

The maps illustrate the home zip codes of all but the handful of visitors to each attraction who hailed from outside this region. Small numbers of Brookby Farm visitors came from Arizona, California, Colorado, Illinois, Nebraska, New Mexico, Oklahoma, Pennsylvania, and other Northeastern and New England states.

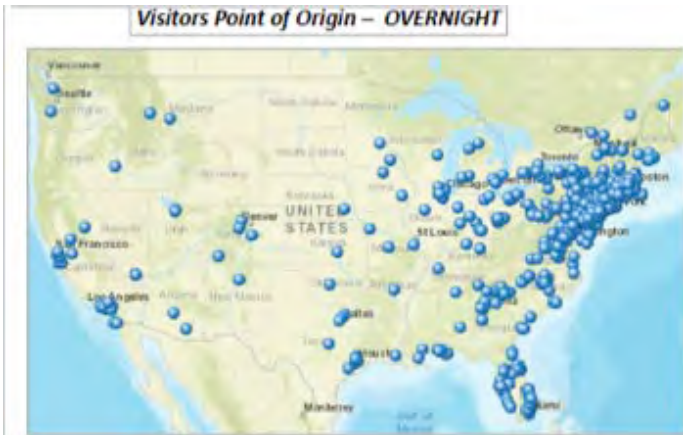


Above: Wassaic Project 2018 event visitor home zip codes

Right: Brookby Farm 2019 visitor home zip codes



The Dutchess Tourism visitor study similarly demonstrated the strength of the regional market for the county, as the maps below show.



Dutchess County visitor origin, Young Strategies Inc. 2018

### Visitor Spending

Visitor spending reported in the findings of the Harlem Valley outdoor recreation survey was significantly less than that reported in the Dutchess Tourism visitor survey. Much of this difference is likely explained by two factors: the preponderance in the Harlem Valley sample of A.T. hikers including thru-hikers who camp along the trail, and the relative lack of high-end shopping and high-ticket visitor attractions and services in the valley. The surveys suggest that both day and overnight visitors spend money locally related to their travels. In the Harlem Valley survey, over half of all visitor spending was in restaurants and grocery stores.

### Average Visitor Spending Per Party/Day

Average party size = 2.5-2.9 visitors

	Harlem Valley	Dutchess County
Day visitor party spending/day	\$93	\$295
Overnight visitor party spending/day	\$117	\$373

Dutchess County data from Young Strategies Inc. 2018, leisure visitors only



Mary Kay Vrba, President and CEO of Dutchess Tourism, Inc., greets a group of veterans thru-hiking the Appalachian Trail. (Photo: Carolyn Handler)

## Visitor Demographics

The Dutchess County visitor survey results suggest that the area is a destination that appeals primarily to individuals who are over 50, retired or in professional occupations, and white. Harlem Valley survey respondents were also predominantly white (84%) with 5% Hispanic or Latino and 2% Asian or Pacific Islander. Nine percent preferred not to answer.

Harlem Valley survey respondents by age group:

Teens - 2%	Twenties - 20%
Thirties - 19%	Forties - 18%
Fifties - 23%	Sixties - 13%
Seventies - 4%	

The Harlem Valley survey, with its sample geared toward outdoor recreation participants, showed a much more even distribution across age groups than the DTI survey.

### Dutchess County Visitor Survey Respondent Demographics

Respondent Demographics	Overnight n=777	Daytrip n=1,696
<b>Generational Group</b>	Teens - 0.1% <b>Fifties – 30.4%</b> Twenties – 2.8% <b>Sixties – 30.8%</b> Thirties – 7.1%      Seventies – 10.3% Forties – 16.6%      Eighties – 1.8%	Teens - 0.1% <b>Fifties – 26.2%</b> Twenties – 4.1% <b>Sixties – 29.0%</b> Thirties – 10.5%      Seventies – 13.5% Forties – 15.5%      Eighties – 1.0%
<b>Gender</b>		
Female	65.9%	69.2%
Male	33.6%	30.2%
Other	0.4%	0.5%
Transgender	0.1%	0.5%
<b>Occupation</b>		
	<b>Retired – 14.1%</b>	<b>Retired – 16.8%</b>
	Education-professor/teacher – 12.7%	Education-professor/teacher – 14.1%
	Healthcare industry – 10.2%	Healthcare industry – 10.0%
	Executive / manager – 8.5%	Administrative/Office support – 9.0%
	Professional / technical – 7.6%	Professional / technical – 6.8%
<b>Ethnicity</b>		
White / Caucasian	83.9%	80.4%
Prefer not to answer	7.5%	10.0%
Hispanic or Latino	4.3%	4.0%
Asian or Pacific Islander	3.8%	4.4%
Black or African American	1.9%	2.0%
American Indian or Alaskan Native	0.7%	1.3%

## Other Survey Insights for Marketing and Promotion

Information from this visitor market analysis have been used by Harlem Valley stakeholders to assist in the identification of target visitor segments for future marketing—including families with children from the surrounding region, a diverse 20s-40s urban population from New York City and active seniors. This information has also been used in nascent promotion and destination development work including efforts to create a Harlem Valley brand strategy.

### Travel Information Sources

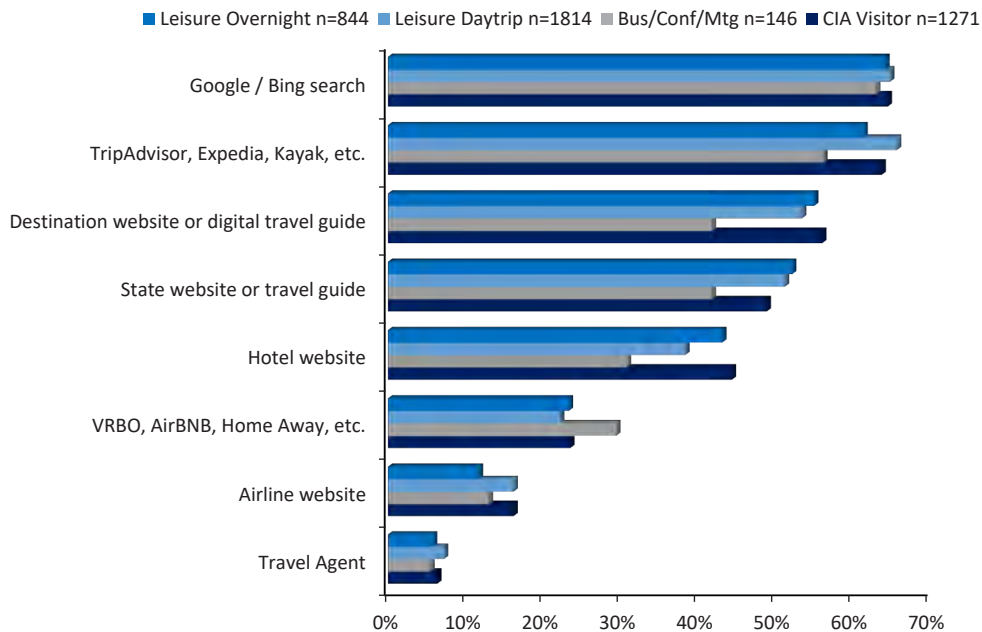
Survey results also offer other insights for marketing and promotion. Both the Harlem Valley and Dutchess County surveys asked visitors how respondents get their travel and trip-planning information.

The questions on the two surveys were not exactly the same, with the Harlem Valley survey inquiring about

planning and information sources while traveling, and the Dutchess County survey focusing more specifically on trip planning. The Harlem Valley survey responses reinforce the importance of local sources of information and wayfinding that help guide visitors once they are in the area, and on word of mouth as an information source in addition to the usual online travel resources and information sources specific to A.T. hikers.

The Dutchess County survey identifies specific online resources that travelers use, pointing the way to communication outlets most likely to reach visitors. Importantly, destination websites and digital travel guides rank highly among travel planning sources, suggesting that the development of a Harlem Valley-specific travel site could be instrumental to the valley’s ability to distinguish itself as a destination within Dutchess County and the larger region.

### Dutchess County Visitor Survey: What are your preferred sources for getaway/vacation planning?

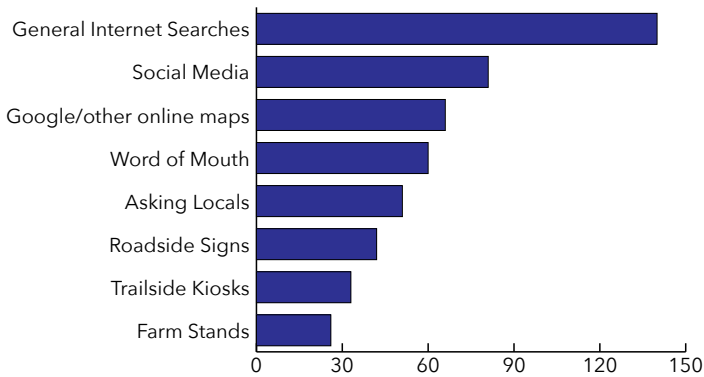


Young Strategies Inc. 2018



## Harlem Valley Visitor Survey

How do you typically find out about businesses, services and attractions in towns that you are visiting or for outdoor recreation?



## Transportation

Ninety-six percent of Dutchess County visitors reported getting to and around the county by car. About a quarter indicated they used the train for at least part of their travels. Twenty percent relied on family and friends for transportation, and ten percent used Uber, Lyft or ride shares. (*Young Strategies Inc.*)

The Metro-North Railroad's Harlem Line makes six stops in the Harlem Valley, including one on weekends at the only train stop on the 2,189-mile length of the Appalachian Trail.



Local sources of information and knowledge are important to help guide visitors and locals in the Harlem Valley.

Clockwise from above: Pete Murowski, owner, Native Landscapes and Garden Center, welcomes and supports A.T. hikers and events at HVATC headquarters (photo: Stacy DuHamel). Sachem Hawk-Storm of the Schaghticoke First Nations shows Ray Bracone a rock from the Ten Mile River that had been used by Native Americans for fishing (photo: Stacy DuHamel). Paul Robinson shows a group of Girl Scouts tools used in trail maintenance (photo: Wendy McDougall).



## Appalachian Trail Name Recognition

The Dutchess County survey included a question about visitor familiarity with four outdoor-recreation and natural areas in the Harlem Valley. The Appalachian Trail carried the strongest name recognition. A quarter of leisure visitors have hiked it, and 46% have heard of it and want to hike it in the future.

The A.T. has significantly better name recognition than other Harlem Valley outdoor attractions: Dover Stone Church, Great Swamp, Harlem Valley Rail Trail. The

A.T. is an even bigger draw to business and conference visitors. This familiarity suggests that the Appalachian Trail could be used to promote other outdoor recreation and local experiences, dispersing recreation and visitation across the valley. This is true for international markets, as well, where the A.T. is widely recognized among outdoor recreation enthusiasts. This connection is reflected in ongoing international marketing efforts by Dutchess Tourism, Inc.

### Dutchess County Visitor Survey: How familiar are you with the following Eastern Dutchess outdoor recreational experiences?

Leisure Overnight n=775	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	83.9%	6.2%	7.5%	2.5%
Dover Stone Church	78.1%	5.7%	13.4%	2.9%
Harlem Valley Rail Trail	62.3%	9.1%	20.6%	8.0%
<b>Appalachian Trail</b>	<b>6.8%</b>	<b>23.9%</b>	<b>48.0%</b>	<b>21.3%</b>

Leisure Daytrip n=1,684	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	78.9%	6.5%	10.5%	4.2%
Dover Stone Church	73.7%	5.7%	15.7%	4.9%
Harlem Valley Rail Trail	48.5%	10.8%	<b>28.2%</b>	12.6%
<b>Appalachian Trail</b>	<b>6.1%</b>	<b>20.4%</b>	<b>45.2%</b>	<b>28.3%</b>

Bus/Conf/Mtg n=125	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	78.3%	5.8%	10.8%	5.0%
Dover Stone Church	72.4%	11.4%	13.8%	2.4%
Harlem Valley Rail Trail	44.7%	13.0%	<b>26.0%</b>	16.3%
<b>Appalachian Trail</b>	<b>5.7%</b>	<b>20.3%</b>	<b>52.0%</b>	<b>22.0%</b>

CIA n=1,199	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	84.0%	5.5%	7.5%	3.1%
Dover Stone Church	79.5%	4.6%	12.6%	3.3%
Harlem Valley Rail Trail	58.5%	9.1%	22.2%	10.3%
<b>Appalachian Trail</b>	<b>6.1%</b>	<b>23.1%</b>	<b>46.0%</b>	<b>24.9%</b>

Young Strategies Inc. 2018

## Importance of Full-Time and Part-Time Residents

Results from both surveys highlight the importance of residents—whether full- or part-time—to the travel and tourism industry in the Harlem Valley. The Dutchess County survey found that a third of part-time residents identify themselves as hikers, and the Harlem Valley survey attributes an average expenditure of \$81 for a party of two to three on outdoor recreation recreation day trips (over half on restaurant meals).

In addition to their direct economic significance, residents act as “tour guides” for visitors. Around half of part-time residents host between one and ten guests annually (*Young Strategies, Inc.*), and provide an important local information source for these guests and other travelers. In that role, their familiarity with the Valley’s resources and commitment to their responsible use is critical.



The Appalachian Trail is a gathering point for Harlem Valley locals and visitors, and a portal to the valley’s other natural, cultural and historical attractions.

Clockwise from top left: Dutchess County Executive Marcus J. Molinaro talks with A.T. thru-hikers (photo: Colleen Pillus). Wild East Woman Christine Walters wields a weed whacker along the A.T. on Corbin Hill (photo: Christine Android). Participants in the Hike for Mental Health pose on the Metro-North Railroad Appalachian Trail stop platform (photo: Donna Briggs Chapman). Melissa “Girl Gotta Hike” Goodwin shows local Girl Scouts and Trail ambassador Jane Geisler a lightweight hiking tent (photo: Lauren Cosgrove).

## Travel Trends that Influence the Harlem Valley

Tourism is the third-largest private sector employer in New York State. In 2017, the state welcomed a record high 243.8 million visitors, whose spending generated an economic impact of \$108.7 billion. Visitor spending exceeded \$67.6 billion, adding \$8.5 billion in tax revenues to state and local coffers. (*New York State Travel Industry Association*)

Dutchess County's tourism industry has also experienced strong growth, with visitor spending up 26% from 2014 to 2018. In 2018, the county's estimated 4.75 million visitors spent over \$500 million, generating \$44.7 million in local taxes and \$35 million for the state and reducing the average Dutchess County household tax burden by \$743. (*Dutchess Tourism, Inc.*)

The United States also has a strong and growing tourism sector, which supports one in ten U.S. jobs (8.9 million directly in the travel industry and 6.8 million in other industries). In 2018, U.S. domestic leisure travel was up two percent from 2017. (*U.S. Travel Association*)

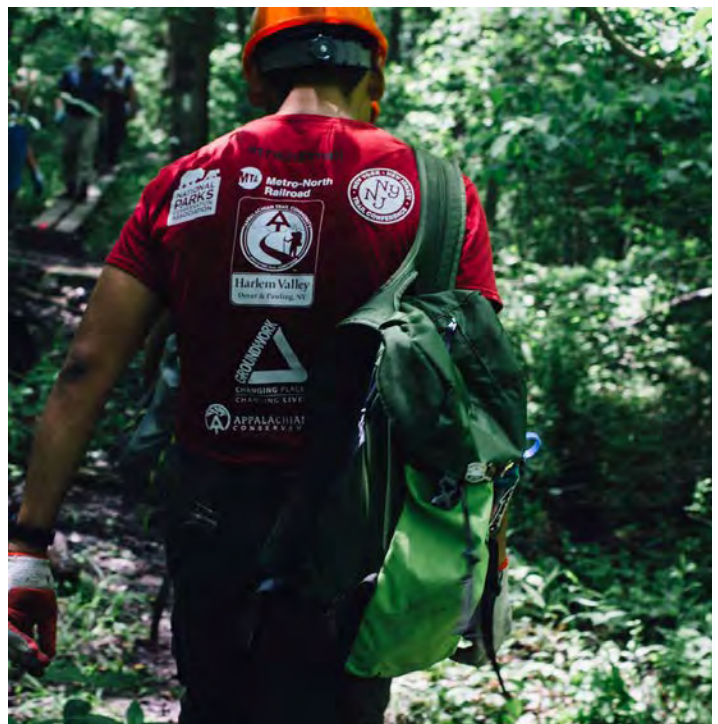
Tourism, broadly defined, is one of the world's largest and fastest growing industries. Globally, tourism has grown by around four percent annually for eight years running. (*U.N. World Tourism Organization*) Over the next decade, the industry is projected to achieve a compound average growth rate of 3.7% per year. (*World Travel and Tourism Council*)

In the United States, a 3.9% uptick in economic activity in outdoor recreation in 2017 outstripped that of the economy as a whole (2.4%) in 2017. Among the fastest-growing activities, guided tours and outfitted travel grew 11.4% in 2017. (*U.S. Bureau of Economic Analysis*)

More people are traveling to more and different places. Lesser-known destinations like the Harlem Valley are attractive to visitors not only for their lower costs but for the diversity of experience and uniqueness of their places. A 2018 study found that 85% of U.S. vacations are domestic, and 39% included a road trip, partly because of cost. (*David Craft, WEX.com*)

Note: Travel trends section based on and updated from James Dion, 2019. Rapid Tourism Site Assessment and Strategic Outlook for the Harlem Valley Appalachian Trail Community.

In the 1980s and early 1990s, promoted destinations in advanced economies dominated the global travel market, receiving more than 70% of total international arrivals. The U.N. World Tourism Organization projects that by 2030 the trend will have largely reversed, with emerging markets and newly "discovered" places capturing nearly 60% of total international arrivals.



Shifts in travel preferences from leisure and entertainment to experience and discovery highlight the value of immersive events.

Top:Wassaic Project educational summer camp. (Photo:Wassaic Project)

Bottom:Trail maintenance volunteer, Groundwork Hudson Valley, during National Trails Day, 2018. (Photo: Charles Flores)

As travel shifts increasingly from “leisure” and “entertainment” to “experience” and “discovery,” (*Expedia Group, Skift & Peak, WEX & Mastercard Advisors*) and “relaxation” evolves into the high growth sector of “health and wellness,” (*Global Wellness Institute*) both the quality of the experience and the uniqueness of a place give well-managed destinations a comparative advantage in the global and domestic travel markets.

Changes that may have important implications for the Harlem Valley include growing income disparity, or a “hollowing out” of the middle class in industrialized countries. This polarization has reduced levels of discretionary spending (including for international travel) for the majority, and has increased price sensitivity. Among a smaller minority of higher income households, there is increasing demand for customized, more exclusive, and more luxurious travel experiences.

One of the clearest indicators of this trend is the growth of the sharing or “on demand” economy, which is in part a creative response to increasing demand for more consumer choice and convenience. For many, however, this is simply a strategy for attempting to do more with less in the face of stagnating or declining discretionary income. Airbnb, a public marketplace for renting and finding accommodations founded in 2008, is now the world’s largest accommodations services provider, in terms of total rooms within its reservations system.

Rapidly changing consumer preferences are driven in part by a demand for more unique, off-the-beaten-path travel experiences, and a search for the authentic. A

2018 study of U.S. domestic travel preferences found that 75% of road trippers wanted to experience different cultures during their travels (versus 69% for those not taking road trips). (*David Craft, WEX.com*) Another study found that 86% of Americans say they have not seen enough of their own country. (*Project Time Off*)

The influence of the demands and preferences of Millennials (generally defined as those born between 1980 and 2000) is becoming more and more pronounced in travel markets. In the U.S. Millennials now represent 27% of the adult population, and a similar share of total travel spending. By 2030, this demographic is projected to represent more than half of global travel spending.

A recent survey of 31,000 Millennials in 134 countries including the United States provides information relevant to destinations of all sizes, including small, less-familiar places like the Harlem Valley.

- More than half reported booking their travel independently (primarily online), and the majority relied on recommendations from friends and social media as their primary sources of travel information.
- The majority are looking more for remote, adventurous destinations than for sun and sand vacations. (*Topdeck*)
- Millennials travel the most of any age group:
  - o More than seven in ten Millennials take at least one leisure trip per year;
  - o Two-thirds of Millennials consider travel a very important part of their life;



Above: Volunteer weekend at Harlem Valley Homestead. (Photo: Harlem Valley Homestead)



Right: Lauren Cosgrove, National Parks Conservation Association, with Aaron Scheinberg and Vu Nguyen, The Mission Continues, at the Metro-North Railroad A.T. train stop. (Photo: Lauren Cosgrove)

- o 71% of Millennials were twice as likely as older travelers to take trips of 14 or more days. (*PhoCusWright*)

Millennials tend to be discerning travelers, willing to pay for the experiences they seek and to voice complaints loudly when expectations are not met.

- 72% of Millennials will pay more for lasting experiences than for material items.
- Priorities in making destination decisions:
  - o Experience a new culture (86%);
  - o Shopping (28%);
  - o Experience a specific culture (50%);
  - o Learn something new (78%). (*Future Foundation*)

According to two 2018 surveys, U.S. Millennials still prefer hotels, but more are open to alternative, more authentic accommodations than previous generations. Fifty-two percent occasionally or regularly use owner-direct rental services such as Airbnb. (*Skift, Resonance*)

Forward-thinking destinations and tourism service providers are employing a variety of approaches in an attempt to respond to these demographic shifts. Some hallmarks follow.

**Greater engagement with the sharing economy,** devoting more attention to and/or working more closely with service providers like Airbnb, HomeAway, and TripAdvisor.

**Shift from product development to experience development** featuring nature, culture, culinary experiences, and more active pursuits (“site doing” vs. sightseeing).

**Focus on sustainability,** highlighting cultural and environmental, as a component of strategies for creating more authentic visitor experiences, reducing negative impacts on local communities and increasing local value added—and as a source of competitive advantage for attracting environmentally and socially aware Millennial travelers.

**Shift from analog to digital,** providing online trip planning tools, customized itineraries, digital destination promotional campaigns, micro-targeting, generating consumer feedback, word-of-mouth advertising and social media.

## Destination Marketing Changes

Previously focused exclusively on marketing tourism destinations, today’s destination marketing organizations (DMOs) are starting to realize the importance of destination management. A recent study conducted by Destination Marketing Association International surveyed 350 DMOs in over 36 countries to understand the most important trends affecting their members and destination marketing efforts. (*Destinations International*)



Thru-hikers “The Turtle” and “CatWoman” stayed at the Station Inn in Pawling when they returned to the Harlem Valley for the opening of Justin Goodhart and Jane Haslam’s show at LAND Gallery, Harlem Valley A.T. Hiker Portrait Project. (Photo: Charles Flores)

The report identified 20 important trends, several of which are particularly relevant to the Harlem Valley as an outdoor recreation travel destination:

1. Social media's reach to travel markets;
2. Mobile platforms and apps as the primary engagement platform for travelers;
3. Customers increasingly seeking personalized travel experiences;
4. Customers increasingly looking for travel destinations where they can experience local ways of life;
5. Online technology enabling faster decision-making by customers, thereby increasing business to a destination;
6. Destination brands becoming more important factors in travel decision making;
7. Short-stay trips and mini-vacations are increasing in popularity;
8. More third-party information providers aggregating destination content;
9. Peer-to-peer buyer influence driving customer purchases;
10. Governments working with tourism bureaus using an integrated, multi-departmental approach, focused on economic development.



Clockwise from top left: Harvesting tomatoes at Growing Heart Farm (photo: Growing Heart Farm). Raelin Seavers and Deanna Mancuso, owner, Lucky Orphans Horse Rescue and president, Harlem Valley Chamber of Commerce, with Trail ambassador Jane Geisler at HVATC Trail Day, 2019 (photo: Stancy DuHamel). Trail volunteers, National Public Lands Day, 2019 (photo: Harlem Valley Homestead).

# The Outdoor Recreation Landscape & Economy

In April 2018, during the first exploratory workshop that initiated this economic assessment, participants identified over 125 points of interest that defined the distinctive experience and landscape of the Harlem Valley. From that list, a beginning list of outdoor recreation resources was developed that includes trails, bicycle routes, parks and protected areas, shooting and hunting clubs, outdoor retailers, lodging, camping, gear rental, farms, farm markets, arts and culture sites, equestrian centers and more.

This list (see Points of Interest in Appendix A) became the basis for developing content for a pilot Harlem Valley Appalachian Trail Conservancy Geotourism travel destination website, and has been expanded and refined from the original.

Local stakeholders helped to identify six key outdoor recreation assets that anchor the Valley's diverse outdoor recreation offerings:

**Appalachian Trail** — Fifteen miles of the globally significant 2,189-mile Appalachian National Scenic Trail traverse the Harlem Valley towns of Dover and Pawling, passing through a corridor of conserved public and private lands.

**Dover Stone Church Nature Preserve** — This 175-acre preserve managed by the Town of Dover protects an ancient cave, scenic brook, four miles of

trails, and a landscape significant to the Schaghticoke First Nations people.

**Great Swamp** — The North Flow of this freshwater wetlands that covers over 6,000 acres lies in the southern portion of the Harlem Valley. The Great Swamp is among the five largest freshwater wetlands in New York State. Less developed for recreation than the South Flow, the North Flow of the Great Swamp offers a more primitive paddling experience, fishing, birding and wildlife viewing, and areas to explore on land.

**Harlem Valley Rail Trail** — A 15-mile hiking and biking trail was built on the former Harlem Valley line between Wassaic and Millerton. An additional 13 miles is under development. Another 18 miles of easement that has been acquired will connect Millerton to Chatham in Columbia County.

**Ten Mile River** — This 15-mile-long river flows through the Harlem Valley into western Connecticut, where it meets the Housatonic River. The popular whitewater paddling and fishing stream begins in Amenia at the confluence of Webatuck and Wassaic creeks. The Ten Mile River watershed includes the Town of North East.

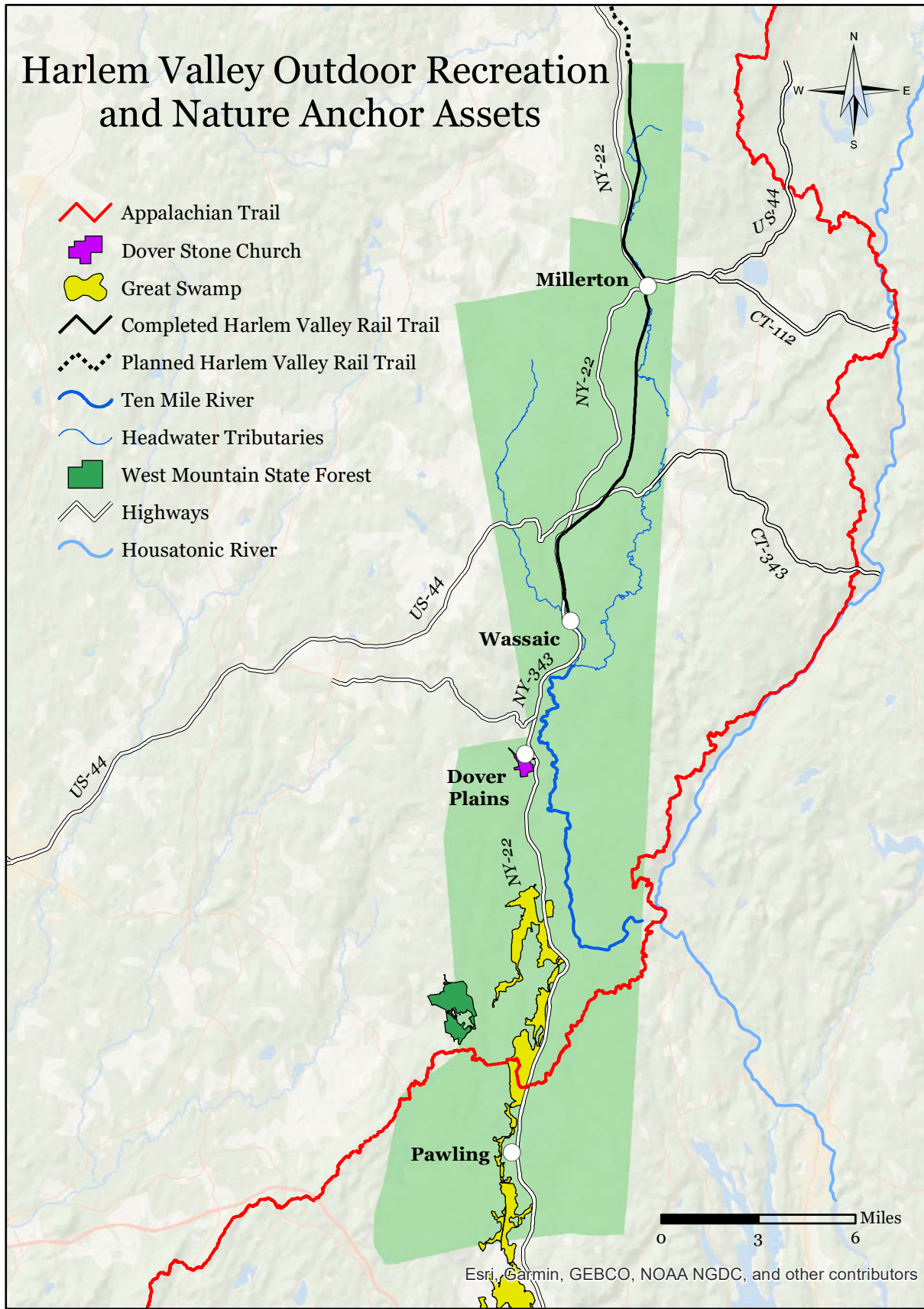
**West Mountain State Forest** — This 830-acre managed forest offers opportunities for hiking, mountain biking, horseback riding, hunting, target shooting, cross-country skiing, and a variety of other outdoor recreation pursuits.



Jeff Barnet-Winsby, Co-Executive Director of the Wassaic Project, makes a point during the April 2018 exploratory workshop that kicked off the outdoor recreation economic assessment. (Photo: Stancy DuHamel)



# Harlem Valley Outdoor Recreation and Nature Anchor Assets



The Appalachian Trail Conservancy  
and the Harbinger Consulting Group  
Author: Tatiana Magee

Source: Audubon Society, Dutchess County Planning Dept., NYS GIS Clearinghouse

## The Outdoor Recreation Economy Overview

For the most part, the Harlem Valley is a rural area with development concentrated in small villages and hamlets. The villages of Pawling and Millerton anchor the south and north ends of the NY Route 22 corridor through the valley, with the town center of Amenia and the hamlets of Dover Plains, Wingdale and Wassaic in between.

Recreation opportunities on public lands (e.g., local, state and national parks, forest and trails) are relatively limited, as 95% of the land in Dutchess County is privately owned compared to 80% in all non-metro areas of New York State. (*Headwaters Economics Amenities*) The Harlem Valley enjoys important publicly-owned recreational assets including the Appalachian Trail, Dover Stone Church, and West Mountain State Forest (see map on p. 25). Some private land is also managed for recreational use, including members-only hunting, sporting clays and equestrian trails. Orvis Sandanona is an exception; its lodge, sporting clays course, shooting and fly fishing schools, and guided activities are open to the public. (See more about these preserves on p. 32.) Nearby in Sherman, Connecticut Audubon's Deer Pond Farm preserve offers over 20 miles of trails open to the public.

The outdoor recreation economy seems diffuse, operating in the margins of more populous, better-serviced areas nearby—e.g., western Dutchess County and across the state line in Connecticut. A small number of outdoor specialty retailers is concentrated in Pawling:

- Anglers Den (fly shop, equipment rental, outfitter);
- Adaptive Shooting Sports (firearm sales and lessons);
- Dutchess Horse and Rider (tack shop); and
- Pawling Cycle & Sport (bicycle and cross-country ski, rental and tours).

Larger communities nearby in New York and Connecticut offer a broader array of outdoor recreation retailers and services. In New York, these include Orvis Sandanona and Argento Equestrian in Millbrook and Ski Haus in Brewster. In Connecticut, examples are Clarke Outdoors in Sharon, L.L. Bean in Danbury, and Housatonic River Outfitters in Cornwall.

Information about Harlem Valley outdoor recreation facilities, access and services is difficult to find on a single online site. In 2019, Dutchess County posted a comprehensive online guide, [Parks and Trails](#), which presents an important piece of the outdoor recreation picture. The lack of a Harlem Valley-specific information source is seen by stakeholders as an impediment to promoting the valley as a distinct destination within Dutchess County. Tourism in the county is concentrated in and around the Beacon, Rhinebeck, Hyde Park, Poughkeepsie and Fishkill areas, and primarily associated with the much larger Hudson River Valley.

There are few outdoor recreation-related events, and very little guided outdoor recreation services or equipment rental in the Harlem Valley. Yet, participation in outdoor recreation is likely strong, given a relatively stable local population, easy access from New York City and many weekend and seasonal homes. The gaps in the outdoor recreation economy signify opportunities for further development focused on specialty retail, personal services, “quirky” takes on typical businesses such as an outdoor recreation thrift shop, services that leverage platforms like Airbnb and Hip Camp, and experiences related to local food, beverage, and culture.



Left: Anglers Den in Pawling. (Photo: Anglers Den)

Above: Pawling Cycle & Sport. (Photo: Pawling Cycle & Sport)

## Outdoor Recreation Economy Concerns and Perceptions

Early workshops and interviews with local stakeholders revealed a range of concerns about the potential for developing the outdoor recreation economy in the Harlem Valley. These were remarkably consistent, as categorized in the graphic below (left).

Other concerns emerged as the study progressed. For example, lack of coordination and variations in capacity among local governments within the valley pose issues for consistent and appropriate development. Regulatory requirements for water and wastewater systems for small or alternative accommodations (e.g., tent structures) are

a barrier to developing appropriate scale, manageable, unconventional accommodations to add to the Harlem Valley’s limited lodging mix while retaining its rural character.

## Visitor Services

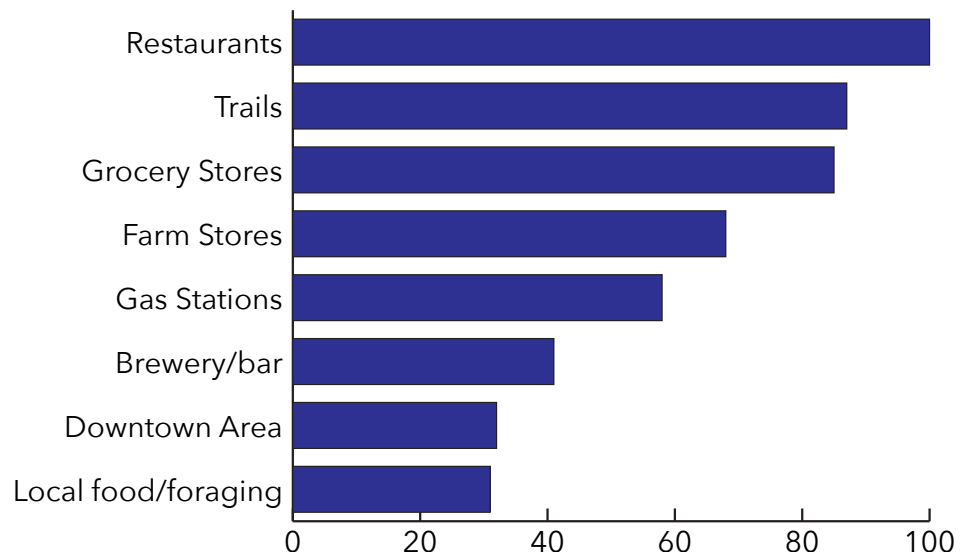
The Harlem Valley survey asked visitors which local services they most used during their outdoor recreation trips. The top responses are shown in the chart below (right).

These services are dominated by food, which is consistent both with outdoor recreationists, and with Dutchess County’s reputation for distinctive dining experiences.

### Concerns about Outdoor Recreation Economic Development from Early Workshops and Interviews



Harlem Valley Visitor Survey: Most Frequently Used Visitor Services



## Lodging

Lack of lodging ranks high on the list of perceived barriers to developing a more robust outdoor recreation economy in the Harlem Valley. Together, the northern and eastern parts of Dutchess County account for about 11 percent of the lodging available county-wide. (*Young Strategies Inc.*) As noted previously, this appears to be proportional to the area’s population. Still, a shortage of lodging in the Harlem Valley, especially for events, is seen as a confounding factor in creating or expanding visitor draws such events and overnight itineraries.

Eastern and northern Dutchess County, including the Harlem Valley, fill their hotel rooms with a higher percentages of leisure travelers and event attendees, and a much lower percentage of business travelers than do the other areas of Dutchess County. Nearly half of this region’s hotel stays are by leisure travelers. There is a larger share of B&Bs and inns in the this region than in the other parts of the county. (*Young Strategies Inc.*)

Short-term or vacation rentals offered through Airbnb, VRBO and other online booking platforms may take up some slack. There are 60 Airbnb “entire place” offerings in the four towns of the Harlem Valley, and more shared spaces. This is roughly 20% of the Airbnb listings in the entire county.

The table below suggests that the Harlem Valley’s limited hotel, motel and inn accommodations are concentrated in the upper price ranges. While short-term rentals are a comparatively good deal for groups (see map on the

following page) a two-person rental is on par with the price of a typical Harlem Valley hotel or inn room.

Vacation rentals are growing in popularity among travelers across Dutchess County. In 2013, no more than three percent of visitors in any category stayed in a vacation rental. In 2018, 14% of leisure visitors and 11% of business or conference travelers reported doing so.

## Farm and Food

There are approximately 2,200 full-time jobs on 678 farms in Dutchess County. In addition, there is more than double that number of jobs—at least 4,400—relating to the county’s agricultural infrastructure, not including grocery stores or food distribution chains. (*Fimbel*)

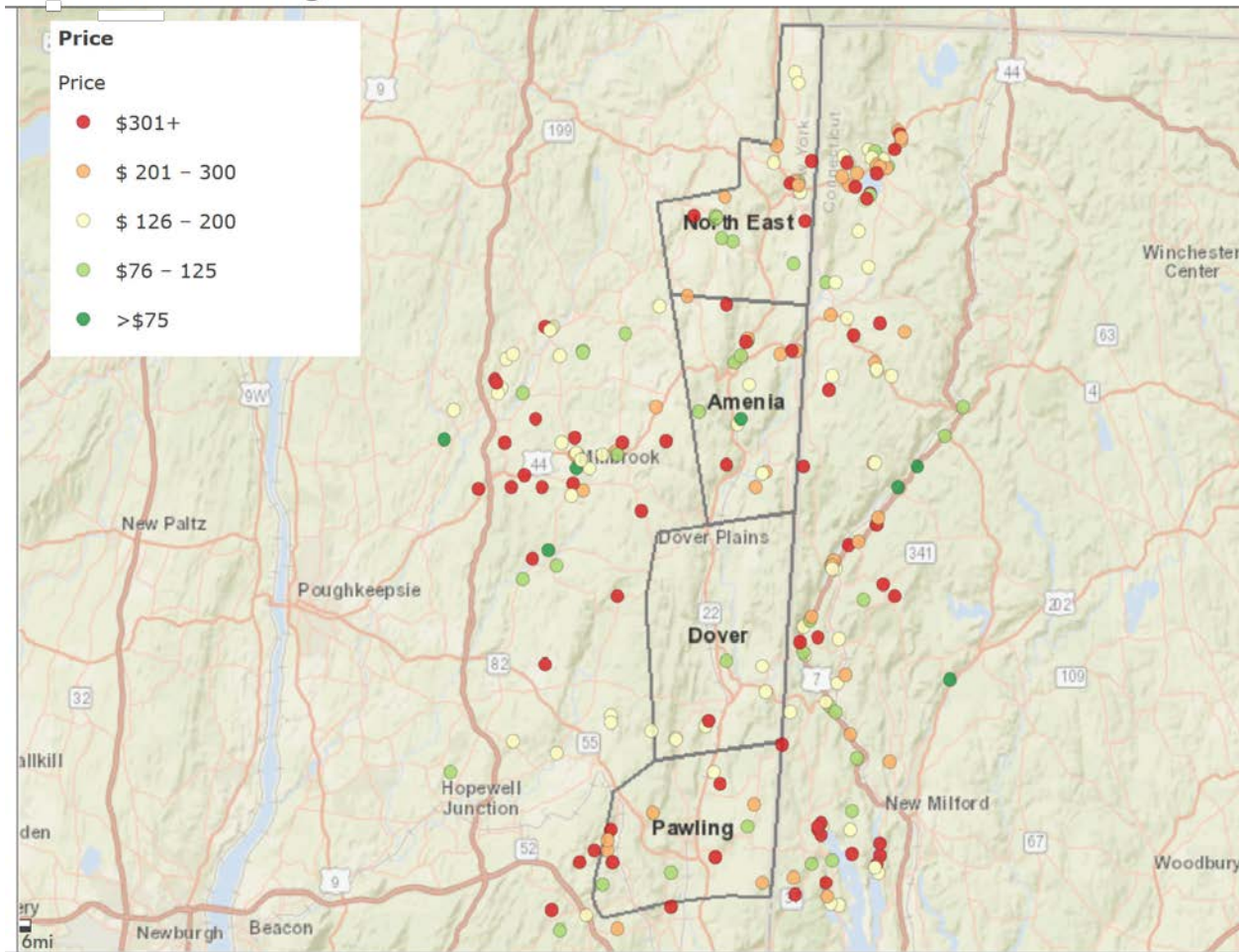
In the Harlem Valley, there is a long and growing tradition of small, specialty and direct-sale farms. Roadside farmstands, larger farm stores, farmers markets, and community-supported agriculture operations are all part of the fabric of local agriculture. Farm-based event venues, local food restaurants, and farm experiences such as cooking over a fire, milking demonstrations, foraging classes and volunteer days add to the strength of this sector of the economy.

The Harlem Valley visitor survey suggests there is significant interest among outdoor recreationists in locally produced food. When asked what would encourage them

### Harlem Valley Accommodations Price Range

	<\$75	\$76-\$125	\$126-\$200	\$201-\$300	\$301+
Hotel/Motel Rooms (109 rooms in 11 properties, including 3 in Millbrook)		27%	22%	51%	
Airbnb Properties (60 “entire place” rentals in Harlem Valley only)	3%	21%	27%	24%	24%
Airbnb Avg. per 2 guests = \$90/night					
Airbnb Avg. for a rental that accommodates 2 guests only = \$204/night					

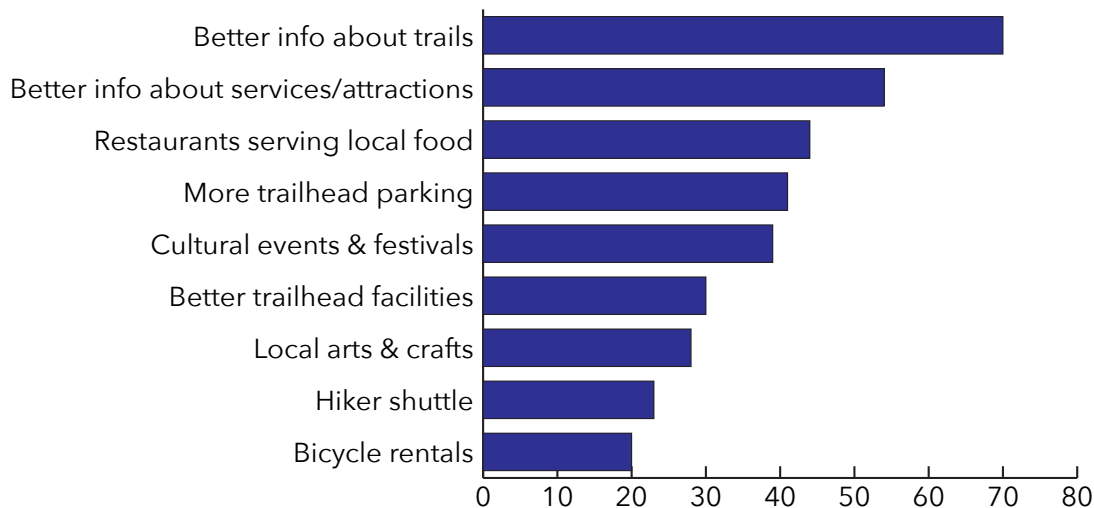
## AirBnB Price Categories



to spend more time in the area, Harlem Valley survey respondents selected “restaurants serving local food” as the third most frequent choice (see chart below). Some farm operators are interested in connecting to outdoor recreation in more ways than simply providing food for hungry hikers and paddlers. Crown Maple, a local syrup producer, operated a widely popular visitor center that

offered a place not only to buy syrup but also to enjoy a meal and hike on trails through the company’s woods. Other producers are interested in promoting itineraries that integrate farm stays or work weekends with outdoor adventure, providing off-trail experiences to Appalachian Trail hikers, and offering trails and other recreational experiences on their own land.

## Harlem Valley visitor survey: What would encourage you to spend more time here?

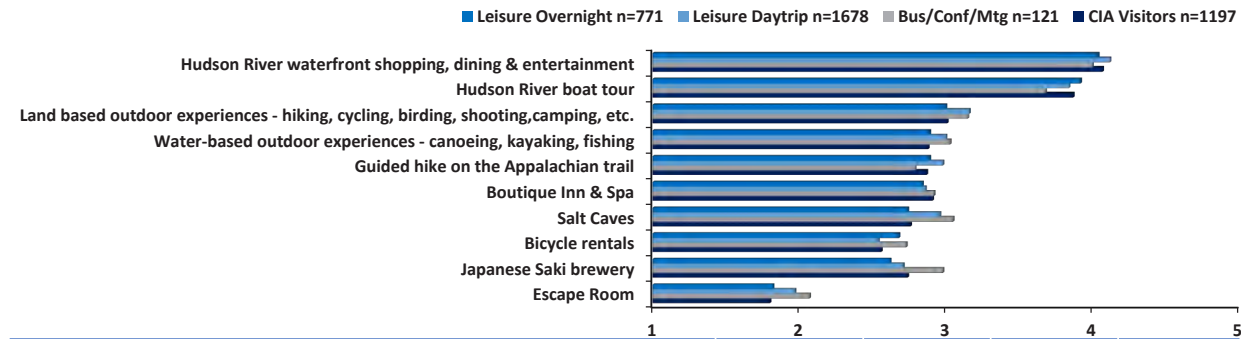


**Appealing Activities/Experiences**

Please tell us if any of the following activities/experiences would appeal if offered in Dutchess County.

**Observations:**

- Hudson River waterfront shopping, dining & entertainment followed by Hudson River boat tour was ranked most appealing by all segments as the most desirable for future product or experience development in Dutchess County.



	Leisure Overnight n=771	Leisure Daytrip n=1678	Bus/Conf/Mtg n=121	CIA Visitors n=1197
Hudson River waterfront shopping, dining & entertainment	4.04	4.12	4.00	4.07
Hudson River boat tour	3.92	3.84	3.68	3.87
Land based outdoor experiences - hiking, cycling, birding, shooting, snowshoeing, camping, etc.	3.00	3.16	3.15	3.01
Guided hike on the Appalachian trail	2.89	2.98	2.79	2.87
Water-based outdoor experiences - canoeing, kayaking, fishing	2.89	3.00	3.03	2.88
Boutique Inn & Spa	2.84	2.86	2.92	2.91
Salt Caves	2.74	2.96	3.05	2.76
Bicycle rentals	2.68	2.54	2.73	2.56
Japanese Saki brewery	2.62	2.71	2.98	2.74
Escape Room	1.82	1.97	2.07	1.80

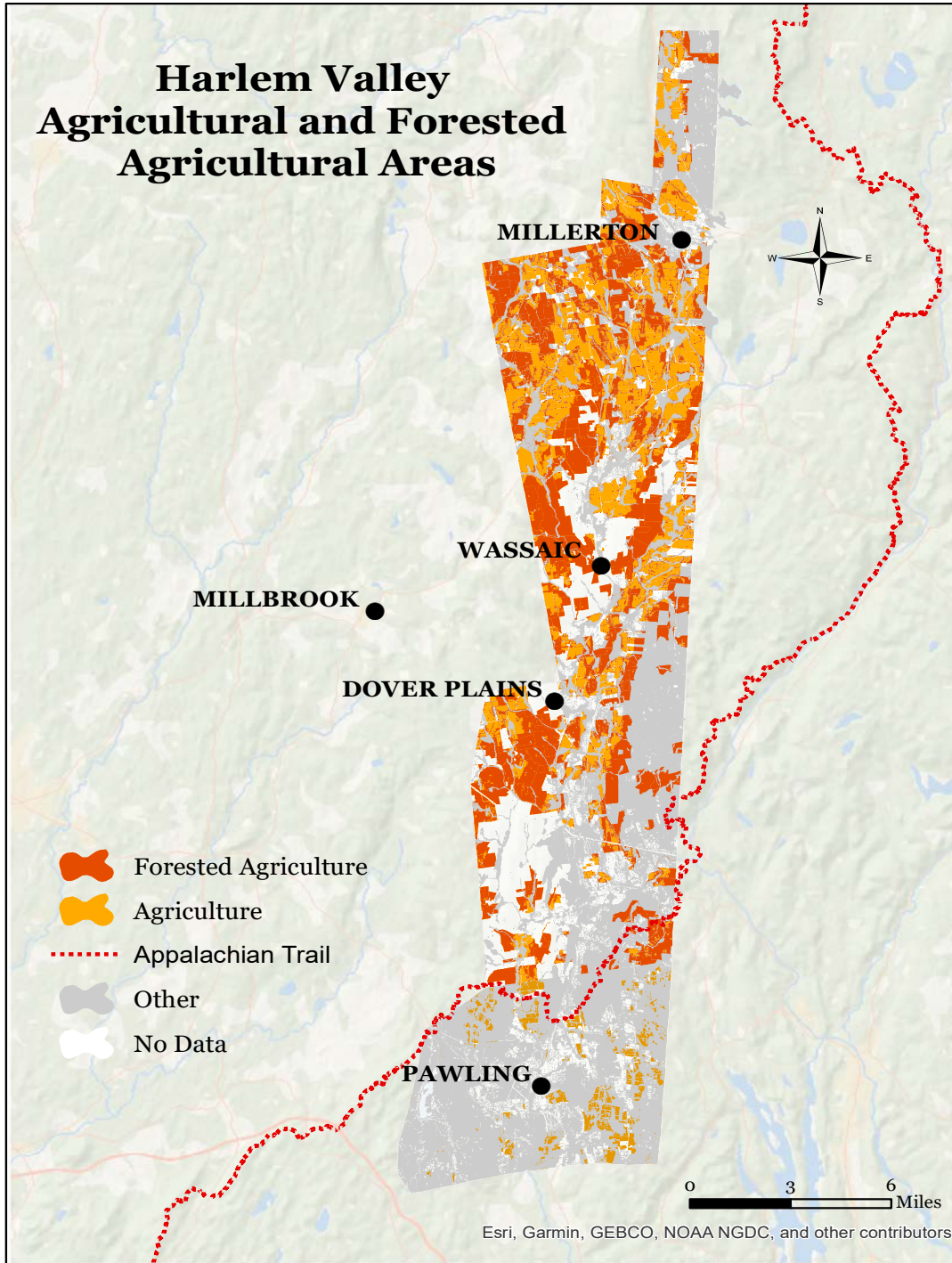
Dutchess County visitor survey respondents indicated interest in a variety of land and water recreation experiences, including guided hikes. (Young Strategies Inc. 2018)



Dutchess County and Harlem Valley visitors are interested in a variety of outdoor recreation activities. From left: Kayaker observing a heron rookery in the Great Swamp (photo: Stacy DuHamel). Kayakers on the Ten Mile River (photo: Ryan Coveney). Riding the Harlem Valley Rail Trail (photo: Susanne O'Neill, Dutchess Tourism, Inc.).

Agriculture accounts for less than one percent of the county's economy, but it is of critical importance in preserving the scenic beauty, rural landscapes, and forests

that lend the Harlem Valley its distinctive character and the feeling of being a place away. The map below shows how much of the Harlem Valley's landscape is in agricultural use, including a large proportion of the forests in



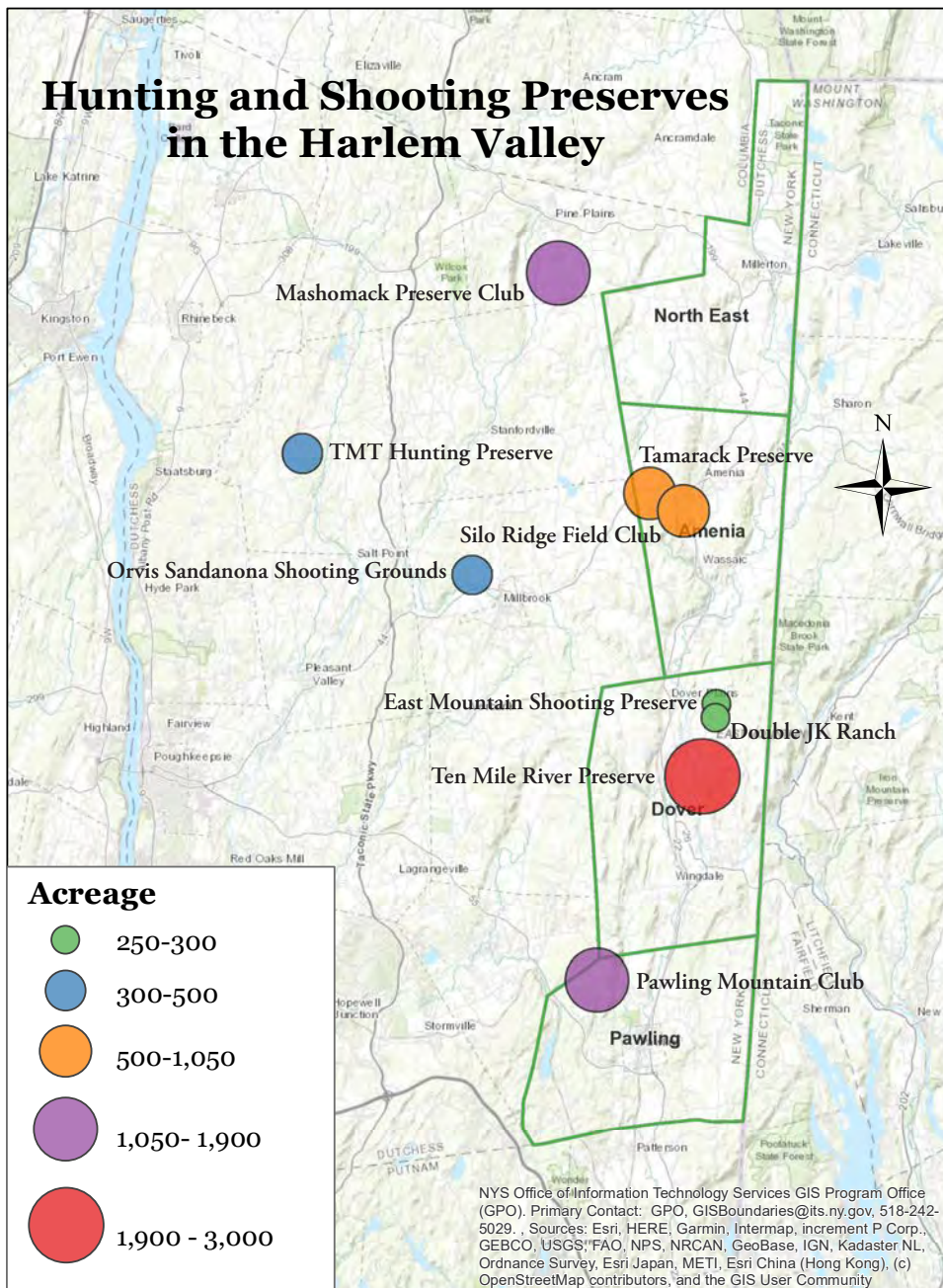
The Appalachian Trail Conservancy  
and the Harbinger Consulting Group  
Author: Tatiana Magee  
Source: Dutchess County GIS, NYS GIS Clearinghouse

some areas.

## Hunting and Shooting Preserves

Hunting and shooting preserves comprise a relatively hidden part of the valley’s outdoor recreation economy. With the exception of Orvis Sandanona, which is open to the public, these are private clubs. Their members come primarily from the surrounding region and New York City. Even for facilities that have overnight accommodations, it is common for members to treat shooting or hunting like a round of golf—as a partial-day activity rather than an overnight excursion.

This is a sector of the Harlem Valley outdoor recreation economy for which it is relatively easy to outline the types of economic impact with a sense of scale. Larger clubs and preserves such as Ten Mile River Preserve, Tamarack Preserve and Orvis Sandanona Shooting Grounds employ about a dozen full-time staff and between 12 and 60 part-time or seasonal staff from nearby, typically within a 30- or 45-minute drive. Applying these figures to five of the larger preserves yields total estimated full-time employment of roughly 60, with another 150-300 part-time employees engaged.



In addition, preserves that offer food service buy at least some of their food locally. Trucks and ATVs are typically purchased and serviced locally. Other services commonly procured locally include insurance policies, vehicle repairs, sporting clay traps and repairs, and maintenance services such as electrical, plumbing and chimney cleaning.

It is not clear how much engagement club members and their guests have—or want—with nearby communities. The impression of preserve owners and managers is that there is relatively little interaction, especially when members are driving in for part of a day.

Hunting and shooting preserves protect 6,900 acres of largely undeveloped space in Harlem Valley proper, and nearly 10,000 acres when nearby preserves are included.

The Appalachian Trail Conservancy and the Harbinger Consulting Group  
 Author: Tatiana Magee  
 Source: NYS GIS Clearinghouse



# Economic Values of Outdoor Recreation and Natural Assets

New York State (NYS) experienced a record-high 243.8 million visitors in 2017, generating an economic impact of \$108.7 billion, the fourth-straight year at over \$100 billion. Tourism is now the state's third-largest employer.

- Tourism supported 938,800 jobs in 2017.
- Visitors to NYS generated \$67.6 billion in direct spending in 2017—almost \$14 billion more than in 2011.
- U.S. domestic markets supplied 70% (\$47.2 bn) of the New York State's visitor spending base in 2017.
- International markets represented 30% (\$20.4 bn) of the spending base.
- NYS tourism generated \$8.5 billion in state and local taxes in 2017, an average per-household savings of \$1,172 in taxes. (*Empire State Development*)

---

*Note: Tourism data updated from James Dion. Rapid Tourism Site Assessment and Strategic Outlook for the Harlem Valley Appalachian Trail Community, 2019.*

Dutchess Tourism estimates annual per-household tax savings from tourism to be \$630. (*Berkeley Young Inc.*)

New York State's Tourism office, I Love New York, identifies ten distinct tourism regions. Dutchess County, where the Harlem Valley communities are located, is included within the the Hudson Valley region.

New York City, Long Island and Hudson Valley together comprise nearly 80% of New York State traveler spending. The Hudson Valley region accounts for five percent of traveler spending in the state. (*Tourism Economics*)

Given the significant economic impacts of tourism in the region, the Harlem Valley has a keen opportunity to position itself as a branded destination, a distinct visitor experience. The Harlem Valley is not well understood as a unique and authentic "destination" within the State of New York and Dutchess County.



Rudd Pond under a brilliant night sky. Photo included in the ATC exhibit, "United By the Trail," U.S. Capitol, 2018. (Photo: Julian Diamond)

## Value of Natural Areas

The Harlem Valley is predominantly forested (see map on p. 35), with significant agricultural holdings that include both forest and farmland. Approximately 93% of the land is undeveloped, with little long-term open space protection on parcels critical to viewsheds, wildlife habitat, recreation and other public values.

The valley's largely natural landscape provides economically valuable ecosystem services such as water filtration, erosion control, flood mitigation, carbon sequestration, and air purification. To illustrate the value of these services, it is useful to look at a 2011 analysis of the socioeconomic value of the Delaware River Basin, which incorporated an extensive literature review of studies from other watersheds to develop per-acre ecosystem services values for different natural systems. (*Kauffman*) Because of the thoroughness of this research and the geographic proximity of the basin to the Harlem Valley, these values are fitting multipliers to use to estimate the dollar value of the services these natural areas provide.

This analysis suggests the value of ecosystem services provided by these natural and human-altered systems in the Harlem Valley is \$195.5 million each year.

### Economic Value of Ecosystem Services in the Harlem Valley

Cover Type	Acres	\$ Value/ Acre	Annual \$ Value
Freshwater wetlands	10,531	\$16,116	\$169.7 million
Farmland	22,465	\$2,949	\$7.3 million
Forest	74,980	\$2,330	\$11.6 million
Open freshwater	1,500	\$2,292	\$3.4 million
Developed	8,700	\$403	\$3.5 million
Other	2,674	n/a	

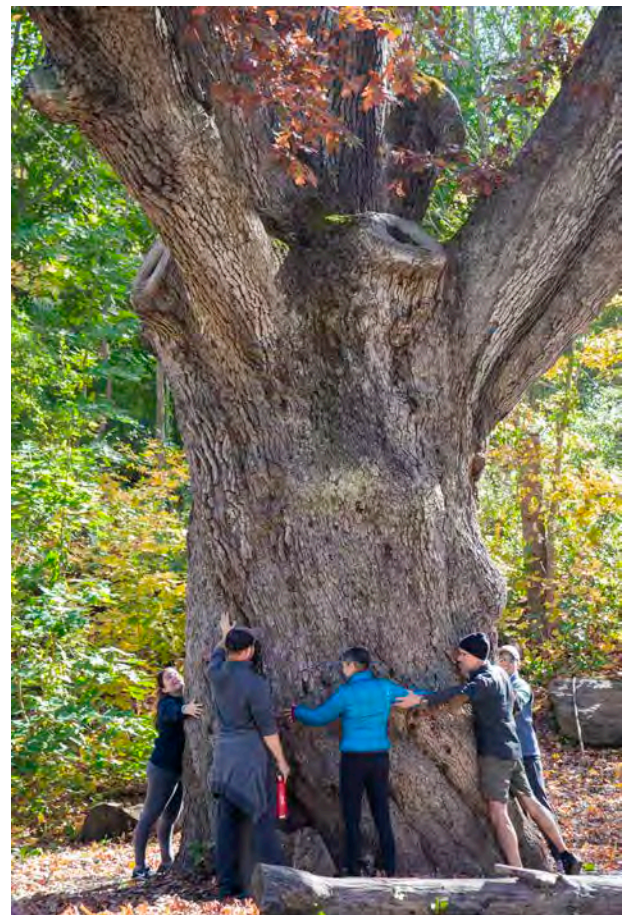
Land cover data provided by Sean Carroll, Cornell Cooperative Extension Dutchess County, dollar value per acre from Kauffman, inflation-adjusted from 2010 estimates.

## Open Space and Viewshed Protection

As noted previously, compared to the U.S. as a whole, Dutchess County has a disproportionately small public land base. Ninety-five percent of land in the county is privately owned, with three percent in state ownership, just over one percent in municipal and county ownership, and less than one percent federally owned. By contrast, 80% of non-metropolitan New York State is privately owned, and so is 61% of the United States. (*Headwaters Economics Amenities*)

Dutchess County and the Harlem Valley have tremendous open space resources, but very little protection for them. County-wide, the U.S. Geological Survey reported 1.7% of the private land base under conservation easement. (*ibid.*)

Given the importance of scenic beauty to Dutchess County visitors, investing in protection of farmlands and forests is one way to safeguard the Harlem Valley's economic vitality into the future. The Appalachian



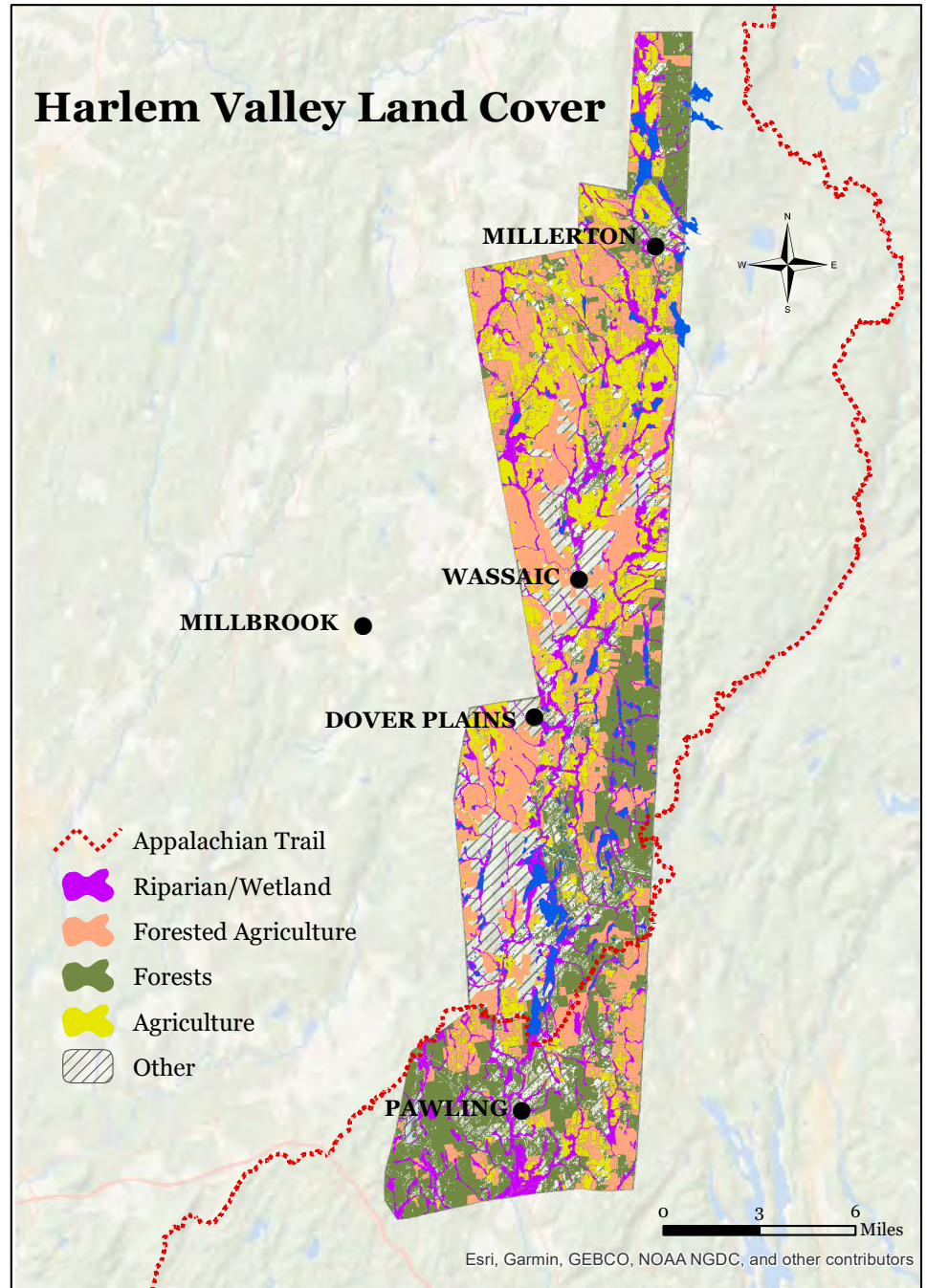
Hikers show their love for the Dover Oak, the largest oak tree on the Appalachian Trail during HVATC Trail Day 2019. (Photo: Steve Aaron)

Trail traverses open spaces and offers views of the scenic Harlem Valley landscape from vista points such as Cat Rocks. Especially in a small valley defined by two parallel ridgelines, viewshed protection for hikers and other recreationists is a clear value connected to open space preservation.

Careful development decisions could also contribute to the valley’s long-term economic vitality. The visual impact of sprawling commercial development along NY Route 22 and other roadways through the valley could change the appearance of the rural landscape that attracts visitors and residents. The visual impact of poorly planned development along the valley floor and forested uplands could be negative for existing residential and retail properties. By contrast, voluntary viewshed and open space protection on private land could add value.

A 2017 Auburn University study found that views of privately owned land permanently protected by voluntary conservation easements added an average of 3.4% to the value of homes in the study area over those without similarly protected views. *(Mittal and Byahut)*

A 2002 study focused on suburban and exurban counties in central Maryland found that both privately owned conservation lands and public, non-military open space “have a positive and significant effect on the value of neighboring residential properties relative to developable pastureland.” In this analysis, the value conferred by the open space increases with the conversion of developable open space—whether cropland, pasture or forest—to preserved open space in private or public, non-military ownership. *(Irwin)*



The Appalachian Trail Conservancy and the Harbinger Consulting Group  
 Author: Tatiana Magee  
 Source: Dutchess County GIS, NYS GIS Clearinghouse

# Potential Outdoor Recreation Economic Development Projects & Initiatives

This list of opportunities for new or enhanced services to appeal to existing and new markets and connect outdoor recreation to other parts of the local economy (e.g., agritourism, arts and culture, education) is derived largely from a series of stakeholder group meetings and individual interactions. A tourism destination assessment conducted by James Dion (Destination Solutions LLC) and assisted by Michele Archie (The Harbinger Consultancy) in the spring of 2019 provided additional information.

Some general priorities that have emerged over the course of work on this assessment include:

- o **Develop trail connections, loop trails and greenways to create a longer-distance network and connections with communities and businesses.**

One example of this type of project is a proposed A.T. Connector Trail, which would link the A.T. to an upgraded Lakeside Park in Pawling with a robust new trail network, camping for hikers, showers, and other facilities. Side trails and trails that provide A.T. access are approved through a process that involves local A.T. clubs, the Appalachian Trail Conservancy and the National Park Service and other relevant land management agencies.

Connecting the Harlem Valley Rail Trail to points south by scenic roads and rivers is another option that has been discussed. As a waterway, the Ten Mile River connects the Harlem Valley Rail Trail in Wasaic to the A.T. in Wingdale, creating a bike, paddle and hiking route that runs the length of the valley. Development of a formal Ten Mile River water trail could enhance opportunities for shuttle and equipment rental services.

Dover and Pawling offer additional opportunities for connections between the larger open spaces of Boyce Park, West Mountain Multiple Use Area, Lakeside Park and Murrow Park. The trails at the Dover Stone Church are easily accessed from the Dover Plains train station, and there is an opportunity to connect to the Nellie Hill Preserve entrance just a mile to the south. Donated by The Nature Conservancy, Nellie Hill was the first parcel in New York that established the Great Thicket National Wildlife Refuge.

- o **Develop a “connecting” infrastructure of goods and services** including guides, gear rentals or loaners, shuttles, tours and itineraries to connect the region and the experiences it offers. Use and develop lodging, farms, restaurants and markets to provide hospitality, information and links to this connective network.

- o **Create a coordinated, and promoted online information source.** A place-based travel website would serve this purpose.

- o **Focus on interpretation.** Develop a valley-wide interpretive plan, offer interpretive training and build local awareness through programs and outreach. Create a grassroots, volunteer-led, “We Speak Harlem Valley” program to develop an informed network of storytellers available to educate and guide residents and visitors. (See the [Oregon “We Speak” program](#) as an example.)

An environmental education center or institute could promote outdoor and conservation education, and help coordinate volunteer vacations and other programming. (See detail below.)

## Other projects to consider

- 1) **Small-scale lodging development and promotion** could encourage high-quality local inventory, services and activity on platforms such as HipCamp.com, Airbnb and Airbnb Experiences, Vacation Rental By Owner, Uber and Lyft.
  - Work with hosts to highlight proximity to the A.T. and other recreational assets and experiences, and make their accommodations “recreation-friendly” with gear, special deals with local outfitters, and other recreation-focused amenities.
  - Use outreach and training to encourage people to offer more “experiences” on Airbnb and other platforms.
  - Indicate whether there is cell signal at trailheads and other recreational access points in online descriptions and itineraries so users know whether shared ride services are an option.

- Connect with local governments to alleviate negative impacts and preempt potential short-term rental shutdowns.
- 2) **Hut-to-hut hiking/bicycling** along a designated trail system with overnight accommodations along the way, or guided inn-based hiking tours (hike by day and sleep at night in cabins, hotels or lodges) could appeal to an active visitor market. See for example this [overview of hut systems in the U.S.](#) and this brief description of [inn-based hiking tours](#) offered by Wildland Treks.
  - 3) **A nonprofit environmental education center** like [Pocono Environmental Education Center](#) could offer school, home-school, youth, adult, and family programs; meeting and retreat space; summer camps; and other outdoor recreation and environmental education services. It could also employ area residents and offer seasonal jobs and internships for young people.
 

More broadly, an organization modeled on prominent institutes and programs such as the Yellowstone Forever Institute and Nature Bridge could offer similar programming, a research focus and partnerships with organizations like Roads Scholars. Paid volunteer vacations could be part of the programming. A Harlem Valley-focused environmental and outdoor education center could also coordinate, integrate and feature programming of the Friends of the Great Swamp, Cary Institute of Ecosystem Studies and other groups with piecemeal or location-specific offerings.
  - 4) **Tour guide outreach to offer New York City train-to-adventure tours and bike trips** could develop locally based, experience-oriented custom guide businesses. [Gotham City Bicycles](#) is a New York City-based example.
  - 5) **An outdoor recreation visitor center** could help orient visitors to the array of available experiences, sites and services. Ideas could be drawn from existing and planned trail visitor centers in other A.T. Communities. See, for example, the [Monson, Maine, A.T. Visitor Center](#) and plans for a [new trail visitor center in Damascus, Virginia](#).
  - 6) **An outdoor recreation concierge service**, online and also potentially available at a new visitor center, could also be marketed to private sporting clubs and inns in the area.
  - 7) **A unified outdoor recreation visitor website** could provide high-quality travel information, connect to the stewardship work of the New York-New Jersey Trail Conference and other local groups, and provide a portal for volunteers. A 14-state Appalachian Trail travel website, possibly developed using a Geotourism approach to engage communities and stakeholders, could serve this purpose.
  - 8) **National Association for Interpretation Certified Interpretive Host training** could engage local hospitality workers to communicate with visitors about outdoor recreation, conserved lands and sustainability in the Harlem Valley. Certification for guides could add to the professionalism and skill base of local outfitters and guides.
  - 9) **Outdoor recreation itineraries** that connect outdoor activities with local communities and businesses could encourage travel and recreation throughout the entire Harlem Valley.
    - Conduct itinerary-building workshops involving representatives from different communities and including groups focused on different types of outdoor recreation (hiking, road cycling, mountain biking, scenic driving, paddling). Include “car-free” itineraries.
    - Feature itineraries on an Appalachian Trail travel website. Promote valley-wide tourism through Metro-North Railroad, Dutchess Tourism, social media, bloggers, REI, *Backpacker* magazine and other media as a way to attract visitors to the Harlem Valley and disperse visitors to points of interest beyond the A.T.
    - Use itinerary development to encourage new collaborative business relationships and connections (e.g., hiking + yoga).
    - Look at models such as the [Tennessee River Valley Geotourism initiative](#), which makes extensive use of the trip planning feature of its website.
    - See [Tips for marketing to Millennials](#) and [Tips for marketing experiences](#) for ideas.

- 10) **Guide, outfitter and rental services** (bike, kayak, canoe, hiking) could be developed to make these experiences available valley-wide. Pursuing a Ten Mile River outpost of Connecticut-based Clarke Outdoors is one possibility.
- 11) **Bicycling destination development and promotion** could build on the Harlem Valley's ample resources and opportunities for cyclists. The backbone of a unified strategy and information source could help boost the region's reputation as a bicycling destination.
- Develop a central source of information about routes, itineraries, and bike shops, rentals and outfitters.
  - Emphasize [Bike Friendly Business](#) improvements like bike racks and bike-friendly transportation.
  - Get routes placed and reviewed on Stravos and other apps and websites.
  - Organize familiarization tours for bloggers and tour operators.
  - Replicate successful bicycling events such as the [Harlem Valley Rail Ride](#).
  - Identify areas where bicycle routes, infrastructure and connectivity are weak, and pursue improvements.
  - Map nearby [state](#) and [U.S. bicycle routes](#) and consider organizing to achieve a new bicycle route designation through the Harlem Valley.

### Resources and examples

- Oregon has a traveler-oriented Bike Friendly Business program including guidelines that could be replicated in the Harlem Valley and Dutchess County. In Oregon, qualifying as bike-friendly gets [special promotional placement](#). See this list of [Bicycle Friendly Business services and amenities](#) for ideas.
- The League of American Bicyclists operates [national bike friendly business and community programs](#).
- Two Oregon communities have leveraged a [designated "Scenic Bikeway"](#) (an Oregon state program) to their benefit.
- The [Adventure Cycling blog](#) shares ten tips for becoming an adventure cycling destination.
- The [Cycle Life HQ guide](#) includes insights for becoming a successful bicycling destination.
- [International Mountain Biking Association](#) and [Adventure Cycling](#) are two supporting organizations.
- These articles include examples of [communities benefiting from bicycle tourism](#).
- [Bicycling economic impact studies](#) help to substantiate potential economic benefits.

## References

- David Craft. [More U.S. Travelers Are on the Road Again](#). WEX.com, September 17, 2018.
- Destinations International, 2017. [Destination NEXT: A Strategic Road Map for the NEXT Generation of Global Destination Organizations](#).
- Dutchess Tourism, Inc. 2019. [Economic Impact of Tourism Continues to Soar: Visitor Spending in Dutchess Up 26% Over Last 5 Years](#).
- Empire State Development. [Tourism Industry](#).
- Expedia Group, 2018. [Multi-National Travel Trends](#).
- Jennifer Fimbel, Ag Navigator. Cornell Cooperative Extension Dutchess County.
- Future Foundation, 2016. [Expedia Millennial Travel Report](#).
- Headwaters Economics, 2019. A Profile of Industries that Include Travel and Tourism, Dutchess County, New York.
- Headwaters Economics, 2019. EPS System Public Land Amenities Reports for Dutchess County and non-metro New York State.
- Headwaters Economics, 2019. EPS System Demographics Reports for Harlem Valley towns, Dutchess County and non-metro New York State. Analysis based on U.S. Census American Community Survey 5-Year Estimates.
- Elena G. Irwin, 2002. The Effects of Open Space on Residential Property Values. *Land Economics*, Vol 78(2), pp. 465-480.
- Gerald Kauffman, 2011. [Socioeconomic Value of the Delaware River Basin in Delaware, New Jersey, New York and Pennsylvania](#).
- Global Wellness Institute, 2018. [Global Wellness Tourism Economy](#).
- MIT [Living Wage Calculator](#).
- Jay Mittal and Sweta Byahut 2017. Scenic landscapes, visual accessibility and premium values in a single family housing market: *Environment and Planning*, Vol 46(1), pp. 66-83.
- New York State Travel Industry Association, 2018. [New York's Tourism Industry Generated New Records for Visitation, Economic Impact and Direct Spending in 2017](#).
- PhoCusWright Travel Market Research 2016. [Mobile, Millennials and Emerging Markets: The Next Wave in Global Travel](#).
- Project Time Off. [State of American Vacation 2018](#). U.S. Travel Association.
- Amanda J. Purcell. Money Wise: [Why are people leaving Dutchess?](#) Poughkeepsie Journal, February 27, 2016.
- Resonance Consultancy, 2018. [The Future of U.S. Millennial Travel](#).
- Skift, 2018. [U.S. Experiential Travel Trends](#).
- Skift and Peak Destination Management Company, 2016. [The Rise of Experiential Travel](#).
- Topdeck Travel and World Youth and Student Travel Confederation, [Millennials Travel Survey 2015](#).
- U.S. Bureau of Economic Analysis, 2017. [Outdoor Recreation Satellite Account, U.S. and Prototype for States](#).
- U.S. Census Bureau, [American Community Survey 5-Year Estimates](#). American FactFinder.
- U.S. Census Bureau, 2009-2013 5-Year American Community Survey [Commuting Flows](#).
- U.N. World Tourism Organization. [2015 Annual Report](#).
- U.S. Travel Association. [U.S. Travel and Tourism Overview](#), June 2019.
- WEX and Mastercard Advisors. [2019 U.S. Travel Trends Report](#).
- World Travel and Tourism Council. [Economic Impact 2019: World](#).
- Young Strategies Inc, 2018. [Dutchess County NY Comprehensive Travel Market Research and Strategic Planning](#). Prepared for Dutchess Tourism, Inc.

## Other Sources of Data, Information and Insight

This economic analysis was undertaken by the Appalachian Trail Conservancy as a step in better understanding and supporting the A.T. Communities that play a central role in outreach, education and engagement that support the Trail and the broader vision of a connected, conserved Wild East landscape. Entering more fully into an inquiry and partnership focused on leveraging outdoor recreation to the benefit of these communities is in keeping with Benton MacKaye's founding vision for the Appalachian Trail as a place that provides respite from dense urban areas while stimulating economic development in the rural towns that provide services along its length.

Like so much that the Appalachian Trail Conservancy and Harlem Valley Appalachian Trail Community do, this economic assessment was a collaborative endeavor. Thank you to more than 60 residents, business owners, nonprofit leaders, government staff and elected officials for contributing hours of your time, data, and insights—and for your enthusiasm and commitment to the valley you share. Each and every person we talked with, who attended workshops or who provided information and guidance was critical to the success of this endeavor.



A.T. Section Supervisor Bill Beehler blazing the Trail with Gabe Brower (photo: Donna Briggs Chapman). Wendy Janssen, Appalachian National Scenic Trail Superintendent, National Park Service, speaking at the Harlem Valley Appalachian Trail Community designation, 2013 (photo: Kara Sander). Julie Judkins, Appalachian Trail Conservancy; Pattie Camillone, WholeyOats; and Lauren Cosgrove, National Parks Conservation Association, outdoor recreation economic assessment kick-off workshop, April 2018 (photo: Stacy DuHamel).

## Additional project supporters and participants

Anne Baker, Appalachian Trail Conservancy  
Jeff Barnett-Winsby, Wassaic Project  
Madison Bell-Rosof  
Roy and Katherine Beller, Silver Cricket Farm  
Katie Berlandi, Pawling Community Foundation  
Tim Bontecou, Tamarack Preserve  
Book Cove  
David Bova, Millbrook Winery  
Henry Brunow, Pawling Community Foundation  
Alanna Burns, Harlem Valley Homestead  
Pattie Camillone, WholeyOats  
Sean Carroll, Cornell Cooperative Extension Dutchess County  
Donna Briggs Chapman, Chair, Dutchess-Putnam A.T. Committee  
Valerie Christie, Pawling Unit Service Manager and Troop Leader, and the Pawling Girl Scout Junior Troop 10410  
Art Collins, Dutchess Land Conservancy  
Lauren Cosgrove, National Parks Conservation Association  
Ryan Courtien, Harlem Valley Appalachian Trail Community  
Stacy DuHamel and Carolyn Handler

Dutchess Tourism, Inc.  
Beth & Wright Dykeman, Dykeman Farm  
Mandy & Henry Dykeman, Dykeman Farm  
Jay Erickson, Pawling Town Planning Board and Oblong Land Conservancy  
Susan & Steve Ewing, Wingnut Farm  
Jill Fieldstein, Solutions for a Better Dover  
Linda French  
Friends of Dick Stapleton  
Edward Gerrard and Peggy Long, Orvis Sandanona  
Jim Hagggett, Dutchess-Putnam A.T. Committee  
Harlem Valley Appalachian Trail Community  
Harlem Valley Homestead  
Sachem HawkStorm, Schaghticoke First Nations  
Donna Haynes, Metro-North Railroad  
Laurel Henschel  
Mike Jastremski, Housatonic Valley Association  
Marge Josephsen, Naromi Land Trust  
Dave Kelly, Harlem Valley Appalachian Trail Community  
Barb Kendall  
Cynthia Kinahan, Pawling Bread Company





Clockwise from top left: Three generations of the Vincent family at Brookby Farm (photo: Elyssa Vincent). Girl Scouts from Dover Troop 10427 at HVATC Trail Day, 2019 (photo: Wendy McDougall). Laura Belleville, VP of Conservation and Trail Programs, Appalachian Trail Conservancy, welcoming the Harlem Valley Community to Trail Day, 2018 (photo: Stancy DuHamel). Lauren Cosgrove, NPCA, working on a collaborative trail maintenance project with the Connecticut Appalachian Mountain Club (photo: Stancy DuHamel). Donna Briggs Chapman and Charles Flores, National Public Lands Day (photo: Donna Briggs Chapman). Suzanne Dixon, Appalachian Trail Conservancy, and A.T. thru-hiker, "Habib" (photo: Stancy DuHamel).

- Kevin Kitowski
- Lewis Kofsky, Growing Heart Farm
- Carol & Michael Kosarin
- Valerie LaRobardier, Town of Dover Historian
- Elizabeth McCormack
- Deanna Mancuso, Lucky Orphans Horse Rescue;  
Harlem Valley Chamber of Commerce
- Michael J. Meagher
- Maryalice Merritt, Akasha's Journey
- Jane Meunier, Solutions for a Better Dover
- Pete Murowski, Native Landscapes
- Jim Muncey, Structure Works & Ten Mile River Preserve
- Pete Murowski, Native Landscapes
- Ildiko & Patrick Orlando
- Sarah & Paul Osher
- Katie Palmer-House, Town Clerk, Town of Dover
- Janet Pickering
- Liz & Kurt Radke
- Cassandra Roth, Adaptive Shooting
- Karin Roux, Dutchess Land Conservancy

- Paul Robinson, Dutchess-Putnam A.T. Management  
Committee
- Stephanie Rockwell, Dutchess County Planning
- Julia Rogers
- Ron Rosen, Chair, NY-NJ Trail Conference and Appalachian  
Trail Coordinating Committee
- Theresa & Richard Ryan  
Solutions for a Better Dover
- Kristin Stinavage, Schaghticoke First Nations
- Becky Thornton, Dutchess Land Conservancy
- Kerri Travis, Crown Maple
- Josh Viertel, Harlem Valley Homestead
- Jaime Vincent, Brookby Farm
- Christine Walters, Harlem Valley Appalachian Trail  
Community
- Jill and Ernie Way
- Chuck Werner
- Dorian Winslow, Womanswork
- Rich Yeno, Supervisor, Town of Dover
- Berkeley Young, Young Strategies, Inc.

## Appendix A: Outdoor Recreation & Related Points of Interest (not all-inclusive)

5 Harts  
Akasha's Journey  
Akin Free Library  
Amenia Farmers Market  
Amenia Historical Society  
Ana's Family Authentic Latin American Kitchen  
Anglers Den  
ArtEast  
Barton Orchards & Tree Top Lines  
Bee Hive Furnaces  
Beekman Historical Society  
Big W's BBQ  
Boardwalk, A.T.  
Book Cove  
Boyce Park (Thomas Boyce Park)  
Brine Garden  
Brookby Farm & Farm Store  
Bulls Bridge, A.T.  
Cary Institute of Ecosystems Studies  
Cascade Winery  
Cat Rocks, A.T.  
Congregation Beth David  
Cousins Deli  
Crown Maple  
darragh studio kombucha  
Daryl's House  
Deer Pond Farm, CT Audubon  
Dover Farmers Market  
Dover Historical Society  
Dover Library  
Dover Oak, A.T.  
Dover Stone Church  
Dutchess Coffee  
Dykeman Farm  
Entrance to New York State, A.T.  
Four Brothers Drive-in and Cabana  
Four Brothers Restaurant  
Freville Farm  
The Grill, Wassaic  
The Grill 2, Wingdale  
Great Swamp  
Great Thicket Wildlife Area, formerly Nellie Hill  
Growing Heart Farm  
Harlem Valley Psychiatric Center Cemeteries  
Harney & Sons  
Hoofprint Cheese Company & Farm Store  
Inner Balance Studio  
Innisfree Garden  
Irondale Schoolhouse  
Irving Farm New York  
JSK Cattle Company & Farm Store  
John Kane House  
Judson Farm Stand  
Kane House / Pawling Historical Society  
Kelly's Creamery  
Ken's Bait & Tackle  
Kent Falls Brewery  
Kent Historical Society  
Lakeside Park  
LAND Gallery  
Lantern Inn Restaurant  
Lucky Orphans Horse Rescue  
Locust Hill Market  
McEnroe's Farm & Market  
McKinney & Doyle  
Millbrook Historical Society  
Millbrook School Trevor Zoo  
Millbrook Winery  
Millerton Farmers Market  
Montgomery Pottery  
Monte's Local Kitchen and Tap Room  
Native Landscapes  
Nuclear Lake, A.T.  
O'Connor's Pub  
Old Drivers Inn  
Orvis Sandanona Shooting Grounds & Sporting  
    Clays Course  
Pawling Bread Company  
Pawling Cycle & Sport  
Pawling Farmers Market  
Pawling Golf Course  
Pawling Historical Society  
Pawling House B&B  
Pawling Library  
Pawling Nature Reserve, TNC  
Quaker Meeting House  
Reverie  
Segundo's Taxi  
Serevan Restaurant  
Shady Knoll Distillery  
Sharon Historical Society  
Ski Haus  
Soukup Farms & Farm Store  
Station Inn  
Sunflour Bakery  
Tabor Wing House / Dover Historical Society  
Tacos and Cones  
Tap House Tavern  
Telephone Pioneers Shelter, A.T.  
Ten Mile River  
Thunder Ridge Skiing & Paintball  
Tio's Restaurant & Cantina  
Tony's Deli  
Troutbeck  
Vinnie's Deli  
Wassaic Project  
Watershed Center  
West Mountain Multiple Use Area  
WholeyOats  
Wicked Finch Farm  
Wiley Shelter, A.T.  
Z Farm

Page intentionally left blank

