



Sullivan County

Economic Development Committee

Meeting Agenda - Final

100 North Street
Monticello, NY 12701

Chair Terry Blosser-Bernardo
Vice Chair Luis Alvarez
Committee Member Brian McPhillips
Committee Member Catherine Scott
Committee Member Joe Perrello

Thursday, June 4, 2026

9:30 AM

Government Center

Call To Order and Pledge of Allegiance

Roll Call

Comments:

Reports:

1. Division of Community Resources
Workforce Development
June 2026 Report

[ID-8399](#)

Attachments: [2026 Economic Dev June Report](#)

2. SCVA

[ID-8410](#)

Attachments: [EDC final packet](#)

3. Chamber of Commerce

4. IDA

[ID-8409](#)

Attachments: [IDA Activity Report May 2026](#)

5. Partnership for Economic Development

Discussion:

Public Comment

Resolutions:

Adjourn



Sullivan County

Legislative Memorandum

100 North Street
Monticello, NY 12701

File #: ID-8399

Agenda Date: 6/4/2026

Agenda #: 1.

Division of Community Resources Monthly Report

Workforce Development

June 2026

Workforce Development

- Planning is underway for the Summer Youth Employment Program (SYEP). Outreach to previous worksites has begun. Policies are being reviewed and updated. Launching the program fully is dependent on the passage of the State budget.
- The college, through a partnership with CDT in Kingston, launched CDL B classes in September 2025. There have been 2 classes and 8 students completed. The class starting in July is full. These classes are on the weekend so take a longer period of time to complete.
- The NYS Systems Change and Inclusive Opportunities Network (NYSCION) update:
 - ✓ The Disability Resource Coordinator (DRC) directly provided services to 37 individuals in April with 3 individuals gaining employment.
 - ✓ The round table and sustainability group quarterly meetings restarted in April. Goals for this year are:
 - Identify and collaborate with second chance employers for justice involved individuals with disabilities
 - Develop two Employer Resource Teams
 - Identify paid and unpaid work experiences for adults and youth
 - 2026 Sullivan County Workforce Summit
 - ✓ The DRC sits on three Sullivan County Task Force pillars, SALT, Single Point of Access (SPOA), Sullivan County Treatment Court, National Navigator Exchange, and the NYS Coalition to prevent addiction and support recovery in employment. In addition, The DRC sits on the Sullivan County Mental Hygiene Specialty group and the Wellness Committee.

- There are 72 individuals enrolled in Adult and Dislocated Worker programs and 14 enrolled in the Youth program receiving different stages of services under the Workforce innovation and Opportunity Act (WIOA). Services include resume development, job search assistance, career counseling, career explorations, occupational training and post-employment follow up services.

Temporary Assistance Caseload Representative Profile 2026

April 2026 Total Caseload - 321	TANF/SNM* Cases - 201	Safety Net Caseload - 120
Medical Issues	6%	2%
Disabled	17%	0
Pregnant/Newborn	1%	0
Needed in Home	6%	0
No Child Care	6%	0
Criminal Justice Involved	7%	73%
Cases Closed	8	35

*TANF – Temporary Assistance for Needy Families
SNM – Safety Net Maintenance of Effort

There are currently 5 individuals enrolled in the Community Work Experience Program (CWEP). The month of April saw 16 entries into employment marking the highest monthly placement total this year for this program.

- **Career Center Services:**

There have been 4 customized in-house hiring events in March and April hosted by the Center for Workforce Development (CWD) at the Career Center. These events brought together 25 businesses and 78 jobseekers.

Business Services

- **In- House Hiring Events**
Sullivan County Career Center
50 North ST., Monticello
11:00AM – 2:00PM

Tuesday, June 16
County of Sullivan
New Hope Community
New York State Police
Delaware Valley Job Corps
U.S. Army
New York Air National Guard
New York State Dept of Corrections

- The CWD provided services to 14 new business customers and listed 195 jobs in April.
- There were 602 individuals who received assistance from the partnership of CWD and DOL staff for the month of April.
- In April 2026 CWD's Facebook page experienced strong growth and increased interaction, welcoming 50 new followers and generating 32.2k views. This spike in followers is likely driven by the Facebook events created to promote the In-House Hiring events, while website traffic also remained robust with 353 unique users and 1,912 website interactions.

Labor Market Data for April 2026

- ✓ Sullivan County's total nonfarm jobs increased 3.2% (1,000) and private sector jobs increased 3.6% (900) for April 2026.

Please note: The net month (March 2026 – April 2026) showed an increase in nonfarm jobs of 1.6% (500) and the private sector jobs showed an increase of 2.0% (500) jobs.

- ✓ For Sullivan County the job gains were:
 - Private Educational and Health Services at 6.6% (600)
 - Professional and Business Services at 9.1% (200)
 - Trade, Transportation and Utilities at 2.3% (100)
 - Government at 1.7% (100)

For Sullivan County the sectors that showed no job growth were:

- Information
- Manufacturing
- Financial Activities
- Mining, Logging and Construction
- Other Services
- Leisure & Hospitality

NYS showed an increase of 0.3% (25,300) in total nonfarm jobs and an increase of 0.3% (24,100) in private sector jobs.

NYS saw the largest jobs gains were found in:

- Private Educational and Health Services at 1.1% (27,700)
- Government at 0.1% (8,900)
- Financial Activities at 0.8% (6,000)
- Mining, Logging and Construction at 1.2% (4,800)
- Trade, Transportation and Utilities at 0.1% (2,000)

NYS saw job losses in:

- Manufacturing at -2.3% (-9,100)
- Leisure & Hospitality at -0.4% (-3,900)
- Other Services at -0.8% (-3,200)
- Information at -0.2% (-600)

The Professional and Business Services sector saw no growth for April 2026.

- ✓ Within the region, Sullivan County's private employment sector grew the fastest, up 3.6 percent. The second fastest growth was found in the Westchester (+1.7 percent), followed by Rockland County (+0.9 percent), and Kingston MSA* at (+0.4 percent). Job losses were centered in Kiryas Joel-Poughkeepsie-Newburgh MSA (-0.5 percent), and Putnam County (-0.4 percent).

*MSA stands for Metropolitan Statistical Area. A Metropolitan Statistical Area is defined as a region that includes a central city and surrounding communities that are linked by social and economic factors. This classification is used by the Bureau of Labor Statistics (BLAS) to analyze labor market conditions within specific geographic areas.

- ✓ The Hudson Valley region showed an increase of 0.8% (8,300) in total nonfarm jobs and an increase of 0.9% (7,500) in private sector jobs.

The largest job gains were found in:

- Private Educational and Health Services at 1.1% (2,700)
- Trade, Transportation and Utilities at 0.9% (1,700)
- Financial Activities at 2.5% (1,200)
- Government at 0.5% (800)
- Professional and Business Services at 0.5% (600)
- Leisure & Hospitality at 0.6% (500)
- Mining, Logging and Construction at 0.7% (400)
- Manufacturing at 0.8% (300)
- Information at 0.9% (100)

The Other Services sector saw no job growth in April 2026.

- ✓ Sullivan County's unemployment rate was 3.7% for April 2026, an increase from 3.1% in April 2025.

April 2026 had 38,100 people in the labor force (36,700 employed & 1,400 unemployed). Year over year the number of employed individuals increased by 2.5% (900) and the number of unemployed individuals increased 16.7% (200). Overall, there was an increase of 3.0% (1,100) in the labor force compared to April 2025.

The total labor force remained the same from March 2026 to April 2026 at 38,100. The number of employed workers increased by 0.5% (200) and the number of unemployed individuals decreased by -12.5% (-200).

- ✓ The Hudson Valley's unemployment rate was 3.4% for April 2026, an increase from 2.9% in April 2025.
- ✓ NYS's unemployment rate was 4.2% in April 2026, an increase from 3.8% in April 2025.
- ✓ The US unemployment rate was 4.0% in April 2026, an increase from 3.9% in April 2025.
- ✓ The April 2026 unemployment rates across the 62 NYS counties ranged from a low of 3.0% for Putnam and Saratoga Counties to a high of 7.3% for Hamilton County. Sullivan County with a 3.7% unemployment rate ranked 20th in the State along with Orange County.
- ✓ Hudson Valley unemployment rankings for April 2026:
 - # 1 Putnam County at 3.0%
 - # 3 Rockland County at 3.2%
 - # 4 Dutchess County at 3.3%
 - # 4 Westchester County at 3.3%
 - #10 Ulster County at 3.5%
 - #20 Orange County at 3.7%
 - #20 Sullivan County at 3.7%

Labor Market Data for March 2026

- ✓ Sullivan County's total nonfarm jobs increased 4.3% (1,300) and private sector jobs increased 4.9% (1,200) for March 2026.

Please note: The net month (February 2026 – March 2026) showed an increase in nonfarm jobs of 1.6% (500) and an increase of 2.0% (500) in private sector jobs.

- ✓ For Sullivan County the job gains were:
 - Private Educational and Health Services at 11.8% (1,000)
 - Professional and Business Services at 9.1% (200)
 - Trade, Transportation and Utilities at 2.3% (100)
 - Government at 1.7% (100)

For Sullivan County the sectors that showed no job growth were:

- Information
- Financial Activities

- Mining, Logging and Construction
- Other Services
- Manufacturing

For Sullivan County the sector that showed job losses was:

- Leisure & Hospitality at -2.8% (-100)

NYS showed a decrease of -0.4% (-35,700) in total nonfarm jobs and a decrease of -0.5% (-41,800) in private sector jobs.

NYS saw the largest jobs gains were found in:

- Private Educational and Health Services at 1.3% (32,500)
- Government at 0.4% (6,100)
- Financial Activities at -0.1% (-600)

NYS saw job losses in:

- Mining, Logging and Construction at -2.4% (-9,300)
- Manufacturing at -3.0% (-12,200)
- Trade, Transportation and Utilities at -1.0% (-15,200)
- Leisure & Hospitality at -1.9% (-17,200)
- Professional and Business Services at -0.9% (-12,700)
- Other Services at -0.9% (-3,300)
- Information at -1.4% (-3,800)

- ✓ Within the region, Sullivan County's private employment sector grew the fastest, up 4.9 percent. The second fastest growth was found in the Kingston MSA* at +2.4 percent, followed by Westchester County at +1.4 percent. Job losses were found in Putnam County at -0.9 percent, Rockland County at -0.8 percent and the Kiryas Joel-Poughkeepsie-Newburgh MSA* at -0.3 percent.

*MSA stands for Metropolitan Statistical Area. A Metropolitan Statistical Area is defined as a region that includes a central city and surrounding communities that are linked by social and economic factors. This classification is used by the Bureau of Labor Statistics (BLAS) to analyze labor market conditions within specific geographic areas.

- ✓ The Hudson Valley region showed an increase of 0.6% (6,300) in total nonfarm jobs and an increase of 0.7% (5,800) in private sector jobs.

The largest job gains were found in:

- Private Educational and Health Services at 4.3% (10,400)
- Professional and Business Services at 0.4% (500)
- Government at 0.3% (500)
- Financial Activities at 0.6% (300)

The Region's job losses were in:

- Trade, Transportation and Utilities at -1.6% (-3,000)
- Leisure & Hospitality at -1.5% (-1,300)
- Mining, Logging and Construction at -1.2% (-700)
- Information at -2.6% (-300)
- Other Services at -0.2% (-100)

The Manufacturing sector saw no growth in March 2026.

- ✓ Sullivan County's unemployment rate was 4.3% for March 2026, an increase from 3.9% in March 2025.

March 2026 had 38,100 people in the labor force (36,400 employed & 1,600 unemployed). Year over year the number of employed individuals increased by 4.0% (1,400) and the number of unemployed individuals increased by 14.3% (200). Overall, there was an increase of 4.7% (1,700) in the labor force compared to March 2025.

The total labor force increased by 0.5% (200) February 2026 to March 2026. The number of employed workers increased by 0.8% (300) and the number of unemployed individuals decreased by -11.1% (-200).

- ✓ The Hudson Valley's unemployment rate was 3.7% for March 2026, an increase from 3.4% in March 2025.
- ✓ NYS's unemployment rate was 4.4% in March 2026, an increase from 4.1% in March 2025.
- ✓ The US unemployment rate was 4.3% in March 2026, an increase from 4.2% in March 2025.
- ✓ The March 2026 unemployment rates across the 62 NYS counties ranged from a low of 3.3% for Putnam County to a high of 7.5% for Hamilton County. Sullivan County with a 4.3% unemployment rate ranked 24th in the State along with Chenango, and Tioga counties.
- ✓ Hudson Valley unemployment rankings for March 2026:
 - # 1 Putnam County at 3.3%
 - # 1 Rockland County at 3.3%
 - # 6 Dutchess County at 3.6%
 - # 6 Westchester County at 3.6%
 - #11 Orange County at 4.0%
 - #11 Ulster County at 4.0%
 - #24 Sullivan County at 4.3%



Sullivan County

Legislative Memorandum

100 North Street
Monticello, NY 12701

File #: ID-8410

Agenda Date: 6/4/2026

Agenda #: 2.



Economic Development Committee
4 June 2026





















REPORTING



SHORT-TERM RENTALS





















KEY PERFORMANCE INDICATORS

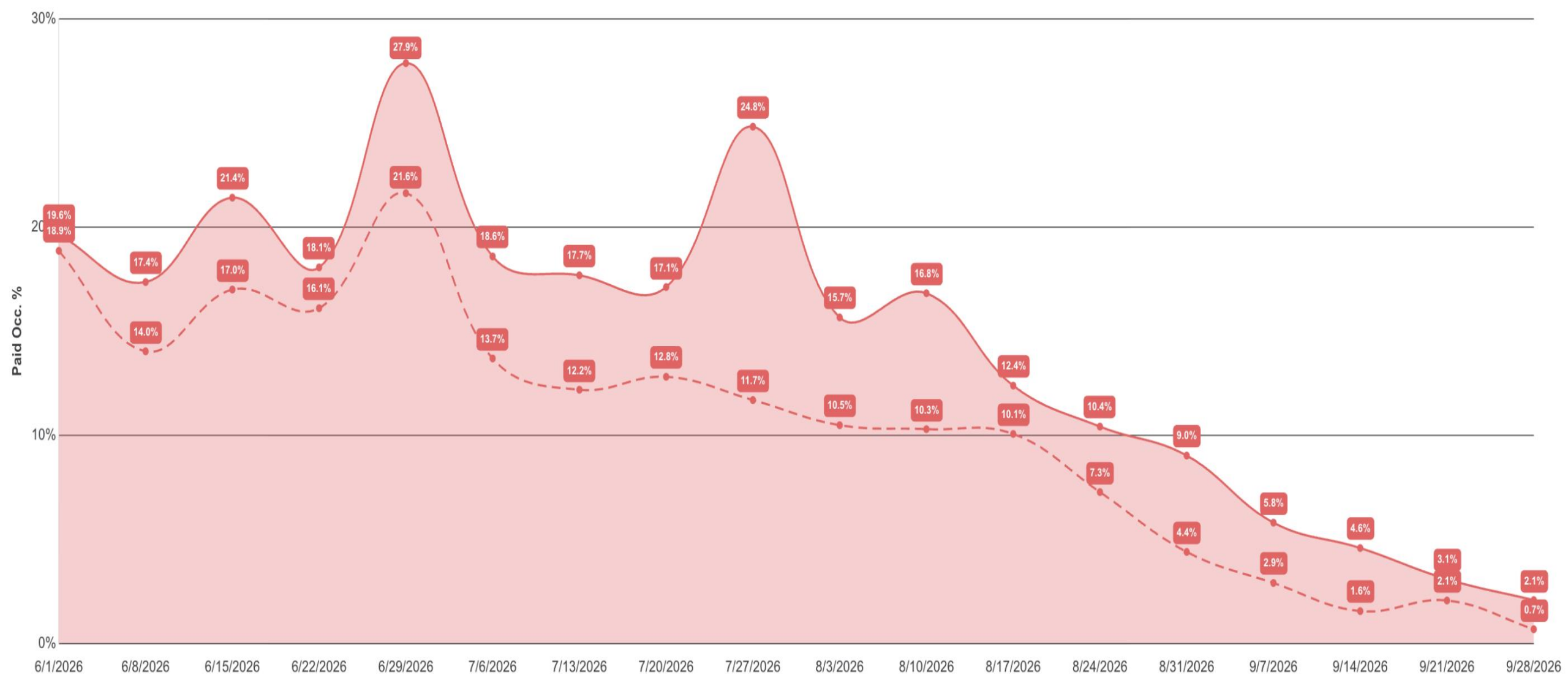
YEAR-OVER-YEAR VARIANCE

<i>as of May 28 @ 1pm</i>		JUNE	JULY	AUGUST	SEPTEMBER	TOTAL
OCCUPANCY		15.5%	 44.6%	 54.7%	 104.2%	 39.5%
AVERAGE DAILY RATE (ADR)		10.5%	 5.5%	 8.0%	 19.6%	 9.3%
REVENUE PER AVAILABLE ROOM RevPAR		27.6%	 52.5%	 67.1%	 144.4%	 52.4%
UNIT REVENUE		21.0%	 41.2%	 49.7%	 130.2%	 41.3%

KEY PERFORMANCE INDICATORS

2026 ACTUAL RESERVATIONS

as of May 28 @ 1pm		JUNE	JULY	AUGUST	SEPTEMBER	TOTAL
OCCUPANCY		18.7%	 20.9%	 14.9%	 5.2%	 15.0%
AVERAGE DAILY RATE (ADR)		\$457	 \$513	 \$524	 \$520	 \$499
REVENUE PER AVAILABLE ROOM RevPAR		\$86	 \$107	 \$78	 \$27	 \$75
UNIT REVENUE		\$3.43M	 \$4.40M	 \$3.20M	 \$1.04M	 \$12.08M



IN YOUR PACKET

- The DMO & CHAMBER Distinctions
- Summer Bookings & Bethel Woods Impact
- "One year in ..." article

Thank you.

”Travel is fatal to prejudice, bigotry, and narrow-mindedness, and many of our people need it sorely on these accounts. Broad, wholesome, charitable views of men and things cannot be acquired by vegetating in one little corner of the earth all one's lifetime.”

– Mark Twain



Reimagining a Destination Brand

Twelve Months In



MICHAEL MARTELON

MAY 28, 2026



Share



One year in. Here's what we built, what it cost, and why it was worth it. I joined the Sullivan County Visitors Association in May 2025. Not with a five-year plan and a slow rollout, but with a conviction that this region deserved better than what destination marketing had been giving it – and that the window to act was now, not after another planning cycle.

One year later, I want to be honest about what that actually looked like.

The destination was ready. The platform wasn't. The Sullivan Catskills has one of the most legitimate origin stories in American tourism. Hudson River School painters romanticized these mountains in the 19th century. The Borscht Belt filled its resorts

with comedians, dreamers, and families for decades. Woodstock happened here. The creative DNA has always been present, deep, and real. What wasn't present was a modern system capable of expressing it – or measuring it.

When I arrived, the brand was fragmented across more than 100 communities with no unifying visual or narrative language. The website was an information hub, not a conversion engine. Marketing was intuition-based, spend was concentrated almost entirely in the New York Metro market, one of the most expensive media environments in the world. And, there was no infrastructure to know whether any of it was working.

The destination had a great story. We just weren't telling it well, to the right people, or with the tools to know the difference. That had to change. The story we needed to tell was rooted, real, and radiant – grounded in place, honest about what this region is, and alive to what it can become. Building the system to tell that story was the work of year one.

What we built and how quickly. The title of this piece isn't rhetorical. We rebuilt the Sullivan Catskills tourism platform in months, not years. Here's what that actually means:

A new destination brand identity. The “Spirit of &” – anchored in the ampersand – gave the region a flexible, scalable visual and narrative system for the first time. Not a tagline. A *framework*: nature & culture, stillness & spark, refinement & realness. A brand that could hold a campsite and a Michelin-recognized hotel in the same story without contradiction.

A fully reimagined website. SullivanCatskills.com became a storytelling and conversion platform – Stay, Play, Taste, Dream, Plan – with real-time booking integration, curated visitor pathways, and AI-powered trip planning through a tool we call Dream. We went from a passive browsing experience to a system that creates, captures, and converts demand.

A premium editorial magazine. We transformed the visitors guide into *here* – produced in partnership with the Edible Manhattan team – a narrative publication

that celebrates the people, places, and wide-open spaces of Sullivan County. The first issue led with maple syrup families who have carried forward generations of craft. Volume II, our Anniversary Issue arriving next week, opens with Forestburgh Playhouse's 80th season, Bethel Woods' 20th anniversary, and the Delaware Valley Arts Alliance's 50th – 150+ years of art-making woven into a single story about what it means to belong to this place.

A data intelligence ecosystem. KeyData Dashboard for real-time lodging performance. Datafy for visitor mobility, origin mapping, and campaign attribution. Critical Mention for earned media tracking. A CRM architecture built for personalization, automation, and the AI applications that haven't been invented yet.

An always-on marketing engine. Brand, advertising, social, editorial, digital, and AI integrated into one connected system, not siloed campaigns that contradict each other, but a single traveler journey told across every touchpoint.

What the numbers say. I believe in letting data do the heavy lifting. So here it is.

Earned media: In the past year, Sullivan Catskills generated 319 tracked mentions, reaching an audience of over 679 million and producing a publicity value of \$4.1 million. That's what a coherent brand narrative with a real PR strategy looks like when it starts working.

Website Q1 year-over-year performance: Total sessions up 17.9%. Total users up 25.4%. Organic search up 110.8%. Mobile organic sessions up 142.2%. Homepage traffic up 232.5%. Direct traffic, the truest measure of brand awareness and loyalty, is now the largest channel by volume.

Lodging performance: The arc here matters more than any single month. Via our vacation rental performance portal.

Q1 (January–March) was nearly flat: occupancy dipped slightly, from 13.6% to 13.3%, but ADR rose 6.7%, which pushed RevPAR into positive territory at +4.7%. A foundation holding while we built above it.

Spring was soft. April and May saw occupancy down 3%, but rate held – up 3% – and RevPAR came in essentially flat year-over-year. We acknowledged it, tracked it, and kept building.

Then THE season in front of us. June-July: occupancy up 29.5%, ADR up 8.5%, revenue up 31.6%, from \$5.96 million to \$7.84 million. August-September: occupancy up 62.2%, revenue up 63.8%, from \$2.59 million to \$4.24 million. The shoulder seasons moved. That was the goal. And it's moving.

The part nobody talks about. Here's what the slides don't show. Rebuilding a destination brand isn't a marketing project. It's an organizational transformation happening in public, in real time, while the tourism season continues, while partners have questions, while legislators want ROI they can quote at budget hearings, and while the staff is learning new systems, new language, and a new way of thinking about their work.

You don't get a quiet room to figure it out. You build while operating. You educate while executing. You make the case for why this matters to people who haven't yet seen the results – because the results don't exist yet. That's the job.

What I've learned in this first year is that the most important work a new DMO leader does isn't visible. It's the internal coherence, the shared language, the aligned, trustful board, the county partners who understand what we're building and why – that makes everything external possible. You cannot redirect a destination's story outward until the people closest to it are telling the same one.

We are still building that. We will always be building that. That's not a failure of execution. That's the nature of institution-building.

Why this is bigger than one year. The Sullivan Catskills has a \$1 billion tourism economy. That number should not be an asterisk. It should be a floor – the baseline from which we measure how much more equitably, sustainably, and intelligently that value can grow.

The brand we launched, the data infrastructure we built, the editorial voice we established – none of it is designed for 2026. It's designed to compound. The first-party data we're collecting now will train smarter campaigns in 2028. The brand system we created will hold creative work that hasn't been made yet. The story framework – rooted, real, radiant – will outlast everyone who built it.

I came here to lay the first brick in something that will outlive me. I mean that without dramatics. Great institutions are built that way – not by people trying to own the outcome, but by people willing to do the work and trust that the foundation holds. One year in, the foundation is holding.

What's next. We are not done. We are barely started. The fly market strategy – reaching consumers in Chicago, Philadelphia, Boston, Washington, Miami, and Los Angeles and beyond who have the propensity to travel further and stay longer – is just beginning to take shape. The Film Commission concept is on the table. The mobile visitor center fleet is ready for a green light. And the community work – the Sullivan County Chamber, the workforce pipeline, the partnerships with SUNY Sullivan and Sullivan BOCES – represents the next rings of the stakeholder model we're building outward from the core.

The lesson of year one is that speed and quality are not opposites. You can move fast and build something that lasts, if you're clear about what you're building and honest about why it matters. Sullivan Catskills is ready for its next chapter. So are we.



Discussion about this post

Comments Restacks



Write a comment...



**BETHEL WOODS
CENTER FOR THE ARTS**

Summer 2026 Vacation Rental Occupancy Impact
Sullivan County, NY | Airbnb Benchmarking Data

Prepared: May 2026

<p>+2.5 pts June YoY Lift 18.7% vs 16.2%</p>	<p>+6.4 pts July YoY Lift 20.9% vs 14.5%</p>	<p>+5.3 pts August YoY Lift 14.9% vs 9.6%</p>	<p>+2.7 pts September YoY Lift 5.2% vs 2.5%</p>
<p>+31 pts Peak Single-Day Lift (Jul 31) Billy Strings</p>	<p>49.8% Peak July Occupancy vs 18.4% in 2025</p>	<p>+108% September Relative Gain Doubled YoY</p>	<p>+55% August Relative Gain vs prior year</p>

Executive Summary

This report presents a comprehensive analysis of Bethel Woods Center for the Arts as the primary driver of vacation rental occupancy in Sullivan County, New York during Summer 2026. Using Airbnb benchmarking data across June, July, August, and September 2026, compared against the same periods in 2025, the data establishes a clear, consistent, and statistically compelling correlation between Bethel Woods concert programming and measurable short-term rental demand across the region.

The findings are unambiguous: Bethel Woods is not merely a contributor to Sullivan County tourism — it is the season's defining economic engine. Every month analyzed shows significant year-over-year occupancy improvements that align directly with the venue's concert calendar. Concert weekends routinely achieve 2x to 3x the occupancy of non-event dates, and the 2026 programming lineup has driven the strongest summer performance metrics in the comparison period.

Key Conclusion

Bethel Woods Center for the Arts is the single most impactful driver of short-term rental demand in Sullivan County. The 2026 concert season has produced measurable, significant, and consistent occupancy gains across all four summer months – with individual events generating occupancy spikes of up to +31 percentage points above the prior year. The venue's programming does not merely attract visitors; it fundamentally transforms the regional tourism economy.

Data & Methodology

All occupancy data is sourced from Airbnb Benchmarking (Paid Occupancy %) via a third-party analytics platform, measured for Sullivan County, NY. Daily paid occupancy percentages were compared across two periods:

- Primary Range: June 1 – September 30, 2026 (as of May 28/29, 2026)
- Comparison Range: Equivalent dates in 2025 (June 2 – October 1, 2025)

Concert events at Bethel Woods Center for the Arts are identified via green event markers overlaid on the occupancy charts. Occupancy lift is calculated as the difference in paid occupancy percentage between 2026 and 2025 for the same calendar date. All observations are based on booking data captured as of late May 2026, meaning forward-looking bookings for summer events are already demonstrating these elevated occupancy levels.

June 2026 Analysis

Monthly Performance

18.7% June 2026 Paid Occ. vs 16.2% in 2025	+2.5 pts YoY Point Lift Month Average	+15% Relative Increase Year-over-Year	37.2% Peak Occupancy Jun 19 — James Taylor
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Concert Event Impact — June

Date	Event	2026 Occ.	2025 Occ.	YoY Lift
Jun 5–6	Pre-season peak	32.7–33.6%	31.3–31.2%	+1–2 pts
Jun 11–13	BW: Darius Rucker / Jazz at Lincoln Center / John Pizzarelli	28.2–29.3%	17.1–22.3%	+6–11 pts
Jun 18–20	BW: James Taylor	35.5–37.2%	26.2–27.5%	+8–10 pts
Jun 26–27	BW: Wyona Judd & Melissa Etheridge	26.2–28.2%	23.6–23.8%	+2–4 pts

Key June Observations

- The June 18–20 James Taylor engagement produced the month's occupancy peak at 37.2%, nearly 10 points above the same dates in 2025. This represents a remarkable lift for what would otherwise be a mid-June shoulder period.
- The mid-June concert cluster (June 11–13) is particularly compelling: in 2025, that window sat at a historical trough of 17–18%. In 2026, identical dates reached 28–29%. Bethel Woods programming has effectively eliminated a previously soft period.
- Even the highest non-event occupancy days in June 2026 show modest YoY improvement (31–33% vs. 31%), confirming that the concert season lifts the entire market baseline, not just event nights.

July 2026 Analysis

Monthly Performance

20.9% July 2026 Paid Occ. vs 14.5% in 2025	+6.4 pts YoY Point Lift Month Average	+44% Relative Increase Year-over-Year	49.8% Peak Occupancy Jul 31 — Billy Strings
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July is the strongest single-month evidence in this analysis. A +6.4-percentage point average lift – representing a 44% relative increase – over a full 31-day period cannot be attributed to weather variation, economic conditions, or general tourism trends alone. The data tracks in precise correlation with the Bethel Woods concert calendar.

Concert Event Impact — July

Date	Event	2026 Occ.	2025 Occ.	YoY Lift
Jul 3–4	BW: Paul Simon / Santana & The Doobie Brothers	48.1–47.7%	31.1–28.4%	+17 pts
Jul 9–10	BW: Tim McGraw / Lindsey Stirling	25.1–25.6%	17.6–18.3%	+7 pts
Jul 12–13	BW: Rock & Roll Playhouse / Pink Pony Party / Buju Banton & Stephen Marley	16.2–25.6%	14.9–16.4%	+5–9 pts
Jul 16–17	BW: TOTO & Christopher Cross / The Romantics	25.7–25.7%	16.8–16.4%	+9 pts
Jul 18–19	BW: Jason Aldean	16.3%	8.3%	+8 pts
Jul 24–25	BW: The Beach Boys	27.1–27.4%	19.7–20.1%	+7 pts
Jul 31	BW: Billy Strings	49.8%	18.4%	+31 pts

Key July Observations

- July 31 – Billy Strings – is the single most dramatic data point in the entire summer dataset. A +31-percentage point lift (49.8% vs. 18.4%) on a late-July weekday is extraordinary. This is textbook evidence that a single high-demand artist drives regional tourism bookings that would not otherwise exist.
- The July 4th weekend (Paul Simon / Santana & Doobie Brothers) nearly reached capacity at 48.1%, up 17 points from 2025's already-strong Independence Day weekend. The concert pairing turned a good holiday into an exceptional one.
- The trough periods between concerts are also elevated vs. 2025 – quieter mid-July dates that ran 11–13% in 2025 are now running 13–16% in 2026. The concert calendar creates a rising tide effect on baseline occupancy across the entire month.
- TOTO & Christopher Cross / The Romantics (July 16–17) achieved a +9 point lift on mid-month dates – demonstrating that classic rock legacy acts have strong travel demand from regional and national audiences.



August 2026 Analysis

Monthly Performance

14.9% August 2026 Paid Occ. vs 9.6% in 2025	+5.3 pts YoY Point Lift Month Average	+55% Relative Increase Year-over-Year	48.5% Peak (Carryover) Aug 1 — Jerry Garcia Bash
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August is historically the softest month for Sullivan County short-term rentals as summer families return to school schedules. The +55% relative increase in paid occupancy YoY makes August arguably the most impressive monthly performance in this dataset – the Bethel Woods programming is overcoming seasonal headwinds that have historically depressed late-summer demand.

Concert Event Impact — August

Date	Event	2026 Occ.	2025 Occ.	YoY Lift
Aug 1	BW: Billy Strings	48.5%	17.3%	+31 pts
Aug 2	BW: Matisyahu	18.3%	11.7%	+7 pts
Aug 7–8	Mid-season build	22.4–23.7%	14.5–15.3%	+8 pts
Aug 15–16	BW: Turnpike Troubadours	23.8–25.2%	17.1–15.2%	+8 pts
Aug 17	BW: Brandi Carlile	17.2%	9.1%	+8 pts
Aug 22–23	BW: Ninja Kidz Live at Kidstock	16.8%	13.4–14.7%	+3 pts
Aug 23	BW: Josh Groban	9.9%	4.7%	+5 pts
Aug 30–31	BW: Tedeschi Trucks Band / Jerry Garcia Symphonic Celebration	17.4–9.4%	2.8–3.6%	+14 pts

Key August Observations

- August 1st carries the Billy Strings momentum directly from July 31, sustaining 48.5% occupancy vs. 17.3% the prior year. Multi-day festival-style programming creates extended booking behavior, not just single-night spikes – a critical multiplier effect for local property owners.
- Brandi Carlile (August 17) nearly doubled prior year occupancy for that date – a particularly strong indicator that her fanbase travels specifically for the Bethel Woods amphitheater experience.
- The entire August baseline floor has risen. Even the quietest mid-August days in 2026 run 10–12%, while the same dates in 2025 saw 6–8%. Concert programming is re-engineering the month's demand curve, not just creating isolated spikes.
- The end-of-August Tedeschi Trucks Band / Jerry Garcia Symphonic Celebration shows enormous lift on dates that were near-zero in 2025, demonstrating Bethel Woods' ability to extend the profitable summer season deeper into late August – capturing demand that previously did not exist.
- Even family-oriented programming (Ninja Kidz Live at Kidstock) generates measurable occupancy lift, confirming that Bethel Woods drives diverse visitor demographics across the region.



September 2026 Analysis

Monthly Performance

5.2% Sept 2026 Paid Occ. vs 2.5% in 2025	+2.7 pts YoY Point Lift Month Average	+108% Relative Increase Year-over-Year	14.1% Peak Occupancy Sep 5 — AL Shakes/Mavis Staples
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September occupancy has historically been negligible for Sullivan County short-term rentals as the summer season concludes. Doubling year-over-year paid occupancy in a traditionally dormant month represents one of the most significant findings in this analysis. Bethel Woods is not just improving the summer peak — it is actively extending the profitable rental season into September.

Concert Event Impact — September

Date	Event	2026 Occ.	2025 Occ.	YoY Lift
Sep 4–5	BW: Alabama Shakes with Mavis Staples	12.8–14.1%	7.8–6.8%	+6 pts
Sep 11–12	Mid-month organic build	8.6–10.1%	5.0–4.9%	+4–5 pts
Sep 13–14	BW: John Fogerty & Steve Winwood	6.8–3.6%	4.6–0.9%	+2–4 pts
Sep 18–19	Weekend peak	7.8–7.7%	3.4–3.9%	+4 pts
Sep 26–27	BW: The Rascals, Graham Nash	6.7%	4.3–4.8%	+2 pts
Sep 28–29	BW: Graham Nash Night 2 / Event Gallery	5.5–1.6%	1.3–0.5%	+4 pts

Key September Observations

- Alabama Shakes with Mavis Staples (September 4–5) is the clear month anchor, driving 14.1% occupancy — nearly double the prior year's equivalent dates. Post-Labor Day bookings of this magnitude would simply not exist in Sullivan County without Bethel Woods programming.
- The entire September baseline has doubled. Even the quietest mid-September days in 2026 run 3–4%, where 2025 saw 0.4–1.6%. The concert calendar is creating a new floor for September demand that did not exist before.
- Graham Nash's two-night run in late September demonstrates that even intimate Event Gallery performances move the regional occupancy needle – and that Bethel Woods' programming reach extends well beyond stadium-scale headliners.
- John Fogerty & Steve Winwood (September 13–14) creates a meaningful mid-month surge that interrupts what would otherwise be an uninterrupted post-Labor Day decline curve – generating occupancy that arrives with no historical precedent in Sullivan County's September rental market.

Cumulative Summer Analysis

Month-by-Month Summary

Month	2026 Avg. Occ.	2025 Avg. Occ.	Point Lift	Relative Lift	Peak Lift Event
June	18.7%	16.2%	+2.5 pts	+15%	James Taylor (+10 pts)
July	20.9%	14.5%	+6.4 pts	+44%	Billy Strings (+31 pts)
August	14.9%	9.6%	+5.3 pts	+55%	Jerry Garcia Bash (+31 pts)
September	5.2%	2.5%	+2.7 pts	+108%	Alabama Shakes/Mavis Staples (+6 pts)

Top 10 Concert Occupancy Lifts — Summer 2026

Rank	Event	Month	2026 Occ.	2025 Occ.	Lift
1	Billy Strings	Jul 31	49.8%	18.4%	+31 pts
2	Jerry Garcia Birthday Bash (carryover)	Aug 1	48.5%	17.3%	+31 pts
3	Paul Simon / Santana & Doobie Brothers	Jul 3–4	48.1%	31.1%	+17 pts
4	Tedeschi Trucks / Jerry Garcia Symphonic	Aug 30–31	17.4%	2.8%	+14 pts
5	James Taylor	Jun 18–20	37.2%	27.5%	+10 pts
6	TOTO & Christopher Cross	Jul 16–17	25.7%	16.4%	+9 pts
7	Tim McGraw / Lindsey Stirling	Jul 9–10	25.6%	17.6%	+8 pts
8	Brandi Carlile	Aug 17	17.2%	9.1%	+8 pts
9	Jason Aldean	Jul 18–19	16.3%	8.3%	+8 pts
10	Alabama Shakes / Mavis Staples	Sep 4–5	14.1%	7.8%	+6 pts

The Rising Tide Effect

A critical finding beyond individual concert spikes is what this report characterizes as the Rising Tide Effect: baseline occupancy across all four months is elevated relative to 2025, even on non-concert dates. This suggests Bethel Woods is doing more than driving event-night bookings – it is conditioning regional traveler behavior, establishing Sullivan County as a summer destination worthy of multi-night or week-long stays built around concert attendance.

Evidence of this effect appears consistently throughout the data:

- July's quietest mid-month days (11–14%) significantly exceed the same dates in 2025 (8–10%)
- August's mid-week troughs (10–12%) are substantially above 2025 equivalents (6–8%)
- September's baseline minimum (3–4%) is 3–5x higher than the 2025 floor (0.4–1.6%)
- June's non-event shoulder periods track 1–3 points above prior year across the month

Strategic Implications

For Sullivan County Stakeholders

The evidence presented in this report supports the following strategic conclusions for county tourism boards, economic development organizations, hospitality operators, and municipal planning:

Investment in Bethel Woods Programming = Direct Tourism ROI

Every major concert event in the 2026 lineup produced measurable, positive short-term rental occupancy impact. The correlation between programming quality and booking demand is direct and consistent. Investment in artist booking, venue infrastructure, and event marketing at Bethel Woods translates into quantifiable short-term rental revenue for the entire county — not just the venue itself.

Season Extension is Proven

The September data is perhaps the most strategically important finding. Occupancy that doubled year-over-year in a traditionally dormant month represents real, new economic activity that did not previously exist. Late-season concert programming – particularly the Alabama Shakes / Mavis Staples booking and the Graham Nash residency – is creating a September market for Sullivan County rentals where none existed before. Further investment in September and early October programming could continue to extend the profitable rental season.

Genre Diversity Drives Broad Demographic Reach

The 2026 lineup spans country (Tim McGraw, Jason Aldean), classic rock (Paul Simon, Santana, TOTO, The Beach Boys), Americana/jam band (Billy Strings, Tedeschi Trucks, Jerry Garcia tribute), R&B/soul (Alabama Shakes, Mavis Staples, Brandi Carlile), reggae (Buju Banton), jazz (John Pizzarelli, Jazz at Lincoln Center), and family entertainment (Ninja Kidz Live). Each genre demographic represents a different traveler profile, and the data shows all of them booking Sullivan County rentals when their preferred artists perform at Bethel Woods. This diversity insulates the local economy from the risk of any single demographic trend.

Multi-Night Programming Multiplies Per-Visit Economic Impact

The Jerry Garcia Birthday Bash / Billy Strings sequence (July 31–August 1) produced two consecutive near-50% occupancy nights. Festival-style or back-to-back programming demonstrably extends visitor stays, increasing total economic output per visitor. Concert clusters – as observed in the mid-June, mid-July, and late-August windows – create extended-stay incentives that single-night events cannot replicate. Programming strategy should prioritize clustered scheduling to maximize rental night capture.

The Bethel Woods Brand Has Regional Drawing Power

The magnitude of the occupancy lifts observed – particularly +31 points on July 31 for Billy Strings, and +17 points for the July 4th weekend – cannot be explained by local attendance alone. These numbers require travelers arriving from metropolitan feeder markets (New York City, New Jersey, Philadelphia, Connecticut) booking 1–3 night stays in Sullivan County specifically to attend Bethel Woods events. The venue has established itself as a destination, not merely a local amenity. This distinction is critical for understanding the full scope of its economic impact on the county.

Conclusions

The Summer 2026 occupancy data for Sullivan County, NY presents an unambiguous picture: Bethel Woods Center for the Arts is the region's primary tourism economic engine, and the 2026 concert season has driven the strongest short-term rental performance in the recorded comparison period.

The evidence supports five core conclusions:

Finding	Evidence
Bethel Woods is the #1 driver of Sullivan County short-term rental demand	Every significant occupancy spike in June–September 2026 corresponds directly to a Bethel Woods concert event
The 2026 lineup represents a step-change improvement over 2025	July posted a +44% relative YoY gain; August a +55% gain; September doubled (+108%)
Individual high-demand artists generate transformational single-event lift	Billy Strings drove +31 pts on Jul 31; Jerry Garcia Bash sustained +31 pts on Aug 1
Concert programming elevates baseline demand across entire months	Non-event dates in 2026 consistently outperform the same dates in 2025 across all four months
Bethel Woods is actively extending Sullivan County's profitable rental season	September occupancy doubled YoY, creating real new economic activity in a traditionally dormant month

Final Statement


Bethel Woods Center for the Arts is not a seasonal amenity for Sullivan County — it is the county's most powerful economic development asset. The 2026 data demonstrates that investment in world-class concert programming translates directly into measurable regional tourism revenue, broader visitor demographics, extended season length, and a rising tide of baseline demand that benefits every property owner and hospitality business in the county. The case for continued, expanded, and strategically structured investment in Bethel Woods programming is made definitively by the data presented in this report.

*Data Source: Airbnb Benchmarking (Paid Occupancy %) — Sullivan County, NY
Analysis Period: June 1 – September 30, 2026 | Comparison: June 2 – October 1, 2025*



DMO vs. Chamber of Commerce

Understanding the Distinct Roles & Lanes

 <h2>DMO</h2> <p>Outward-facing. Tourism-driven. Perception is the product.</p>	vs	 <h2>Chamber</h2> <p>Inward-facing. Business-driven. Local advocacy is the mission.</p>
<p>PRIMARY AUDIENCE</p> <p>Travelers, visitors, and media outside the county — people who haven't decided to come yet.</p>	⇌	<p>PRIMARY AUDIENCE</p> <p>Local business owners, residents, and elected officials within the county.</p>
<p>CORE MISSION</p> <p>Shape and amplify how the destination is perceived by the outside world. Drive visitation and economic impact through storytelling.</p>	⇌	<p>CORE MISSION</p> <p>Advocate for the local business community — lobbying, networking, workforce, and local economic development.</p>
<p>INDUSTRY FOCUS</p> <p>Tourism-specific: hospitality, lodging, attractions, outdoor recreation, and culinary — all in service of a unified destination brand.</p>	⇌	<p>INDUSTRY FOCUS</p> <p>Industry agnostic — serves retail, healthcare, real estate, manufacturing, and every other local sector equally.</p>
<p>GEOGRAPHIC LENS</p> <p>Looks outward — positioning the county on the regional, national, and international stage.</p>	⇌	<p>GEOGRAPHIC LENS</p> <p>Looks inward — hyper-local focus on the health of businesses and infrastructure within county lines.</p>
<p>KEY ACTIVITIES</p> <p>PR & media relations, influencer campaigns, content marketing, brand partnerships, visitor guides, earned media, and destination storytelling.</p>	⇌	<p>KEY ACTIVITIES</p> <p>Legislative advocacy, ribbon cuttings, business mixers, grants facilitation, workforce initiatives, and government relations.</p>
<p>DEFINITION OF SUCCESS</p> <p>Increased overnight stays, media impressions, destination brand awareness, and visitor spending — measured externally.</p>	⇌	<p>DEFINITION OF SUCCESS</p> <p>Business retention and growth, policy wins, member satisfaction, and a thriving local economy — measured internally.</p>

These organizations are complementary — not competitive. The DMO carries the destination's story to the world; the Chamber keeps the community strong at home.



Sullivan County

Legislative Memorandum

100 North Street
Monticello, NY 12701

File #: ID-8409

Agenda Date: 6/4/2026

Agenda #: 4.

ACTIVITY REPORT –MAY 2026
COUNTY OF SULLIVAN INDUSTRIAL DEVELOPMENT AGENCY (IDA),
SULLIVAN COUNTY FUNDING CORPORATION (SCFC), THE SULLIVAN
COUNTY INFRASTRUCTURE LOCAL DEVELOPMENT CORPORATION
(TSCILDC), SULLIVAN COUNTY RESORT FACILITIES LOCAL
DEVELOPMENT CORPORATION (SCRFLDC)

May 29, 2026

The IDA Board held its regular monthly meeting on May 18th. At the meeting the Board adopted the following resolutions:

- Resolution directing the recapture of sales and use tax benefits exceeding the amount authorized relating to the **NY Forestburgh I LLC** project. This is a solar photovoltaic electricity generating facility in the Town of Forestburgh.
- Resolution authorizing an increase in the authorized sales and use tax abatement for the **Maude Crawford Realty LLC and Bridgeville Ski Company Inc. d/b/a Holiday Mountain** project in the Town of Thompson.
- Resolution approving the **Rockland Solar CS, LLC** project. This is an approximately 4.6MWac solar photovoltaic electricity generating facility to be constructed along Amber Lake Road in the Town of Rockland
- Resolution approving the **Amytra Development, LLC and Eldred Entertainment, LLC** project, for the development of a spa at the Eldred Preserve in the Town of Highland.

SCFC, TSCILDC, and SCRFLDC also met on May 18th. Each Board adopted a resolution authorizing a reduction in the number of Directors from nine to seven. Following adoption of these resolutions and related actions and approvals, the IDA, SCFC, TSCILDC, and SCRFLDC Boards will each be comprised of seven Directors.

The next regular monthly meeting of the IDA Board will be held on Monday, June 8th at 11:00 AM in the Legislative Committee Room.

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