

Place-Based Economic Development in York County, PA

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**Economic Development
Corporation**

Chamber of Commerce

**Downtown Inc
(Main Street York)**

AFFILIATES

General Authority

**Industrial
Development Authority**

**BLOOM Business
Empowerment Center**

**Redevelopment
Authority**

**York Business
Improvement District
Authority**

**York County
Land Bank Authority**

**Firefly Outdoor &
Economics Consultancy**



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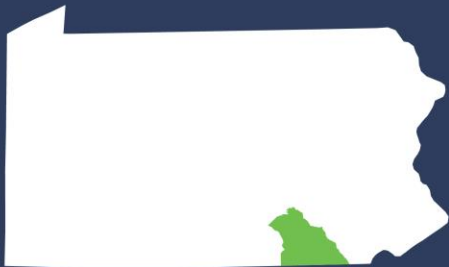


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York County PENNSYLVANIA

8TH
Largest County in PA



*Among PA's fastest
growing counties*

POPULATION: 450,000



40%

of US Population
within 4-hour
drive



**3 International
Airports**



35-Minute Drive To: Harrisburg, Hershey, Lancaster,
Baltimore, and Gettysburg



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- 1) Warehouses and Freight Management
- 2) Attainable Housing
- 3) Outdoor Recreation Economy



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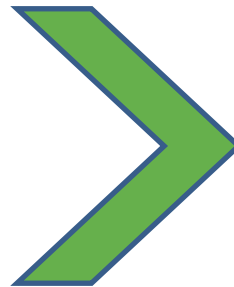
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York County Economic Action Plan

In March 2020, we launched the EAP planning process with 1,000+ stakeholders providing input:

Outcomes we hoped to achieve:

- Alignment
- Systems Change (and a pivot)
- Tangible Economic Progress
- Economic Opportunity & Mobility



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York County Economic Action Plan



Future of Industry

- Current economic drivers
- Projected industry growth
- Impact of technology and innovation



Workforce Development

- Aligning labor force with industry needs
- Education and upskilling



Entrepreneurship

- Small business support
- Diverse venture development



Equity and Economic Mobility

- Removing barriers to employment
- Diversity and inclusion



Quality of Place

- Arts and cultural amenities
- Environmental assets



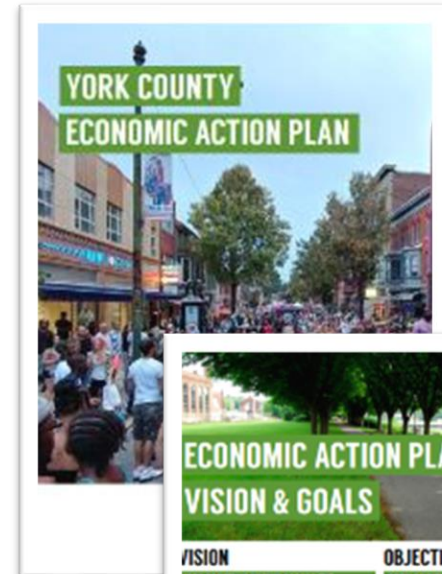
Infrastructure/Built Environment

- Roads, transit, water, sewer
- Commercial, industrial, residential real estate



Rural Economy

- Community and agricultural businesses
- Broadband, other services



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York County Economic Action Plan

Annual COVID Recovery Reports

Annual topic-specific, deep-dives

Bi-Monthly Snapshot Reports

Investments in software



York County Economic Action Plan

Of 142 total actions in the plan, 89% were either complete or underway at the end of 2024.

We are doing a 5-year refresh to ensure the next half of plan implementation is just as effective.

	Total Actions	Complete	In Progress	Not Started	10 Year Underway /Complete	10 Year Total	10 Year Percentage	2 Year Underway/ Complete	2 Year Total	2 Year Percentage	YCEA Led Actions
Equity & Inclusion	24	11	9	4	20	24	83%	17	17	100%	20
Workforce & Economic Mobility	24	16	8	0	24	24	100%	15	15	100%	20
Future of Industry	21	19	2	0	21	21	100%	15	15	100%	20
Entrepreneurship	18	13	5	0	18	18	100%	15	15	100%	11
Rural Economy	12	5	4	3	9	12	75%	7	9	78%	12
Quality of Place	23	5	14	4	19	23	83%	15	16	94%	5
Infrastructure & Built Environment	20	9	6	5	15	20	75%	11	14	79%	13
TOTALS End of Year 2024	142	78	48	16	126	142	89%	95	101	94%	
TOTALS End of Year 2023	142	57	56	29	113	142	80%	87	101	86%	101
Change EOY 2023-2024		21	-8	-13	13		9%	8		8%	0



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York County Economic Action Plan

Quality of Place



Rural Economy



Quality of Place



Entrepreneurship



Equity & Inclusion



Future of Industry



Workforce & Economic Mobility



Warehouse and Industrial Development



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Warehouse Development

- 221 million tons of inbound freight; 236 million tons of outbound freight. Tonnage anticipated to grow by 46 percent in the next 25 years.
- National vacancy rates for industrial real estate have risen to 8.8%—but not in south central PA.
- York County has a current vacancy rate of 1.92% (down from 2% in 2024) out of more than 90 million square feet (and growing).
- Facilities of 10,000+ square feet account for 78% of all transactions.



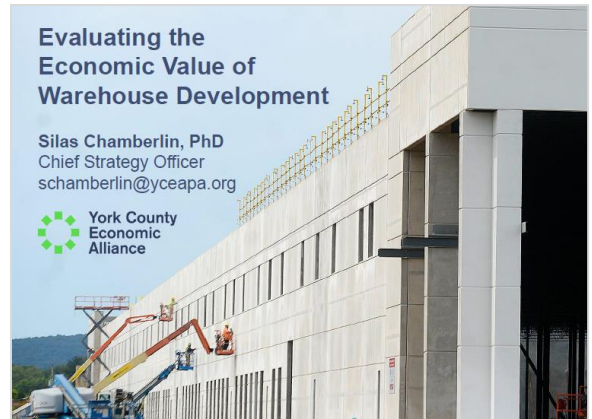
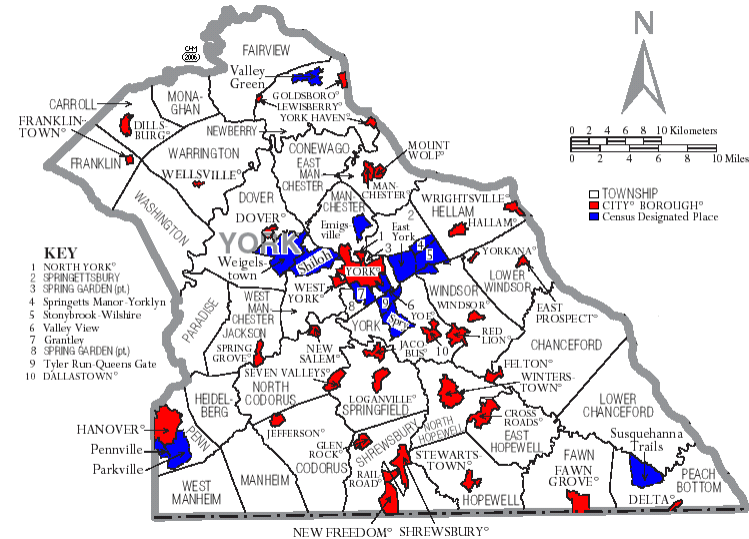
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Warehouse Development

- Demand for very large warehouse development will continue for the foreseeable future.
- In Pennsylvania, land use and development is determined at the municipal level.
- York County has 72 municipalities, each of which has its own ideas about appropriate land use and the role of industrial and warehouse development in their economic strategy.
- Our approach is all about education and mitigating impact.



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Warehouse Development

- In 2023, York County Planning Commission created the county's first freight management plan and defined the core freight network.
- In 2024, we launched a Freight Advisory Committee



YORK COUNTY Freight Plan

June 22, 2023

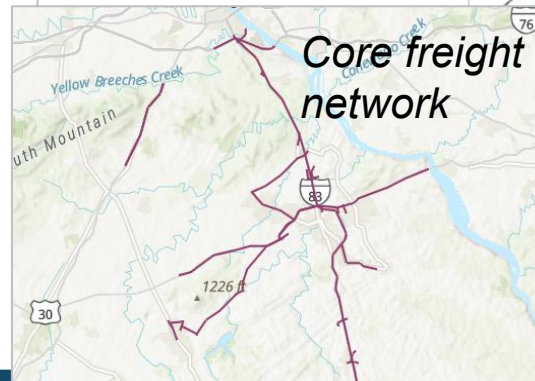
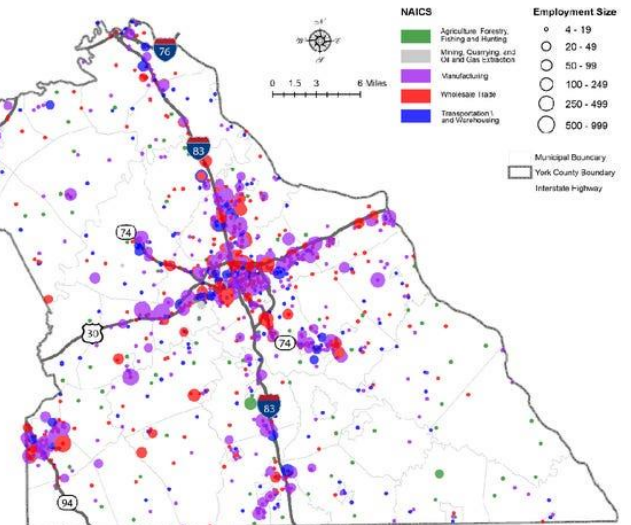


Figure 4. Freight-related Employment by Industry and Business/Employer Size



Source: York County; Gannett Fleming, Inc.



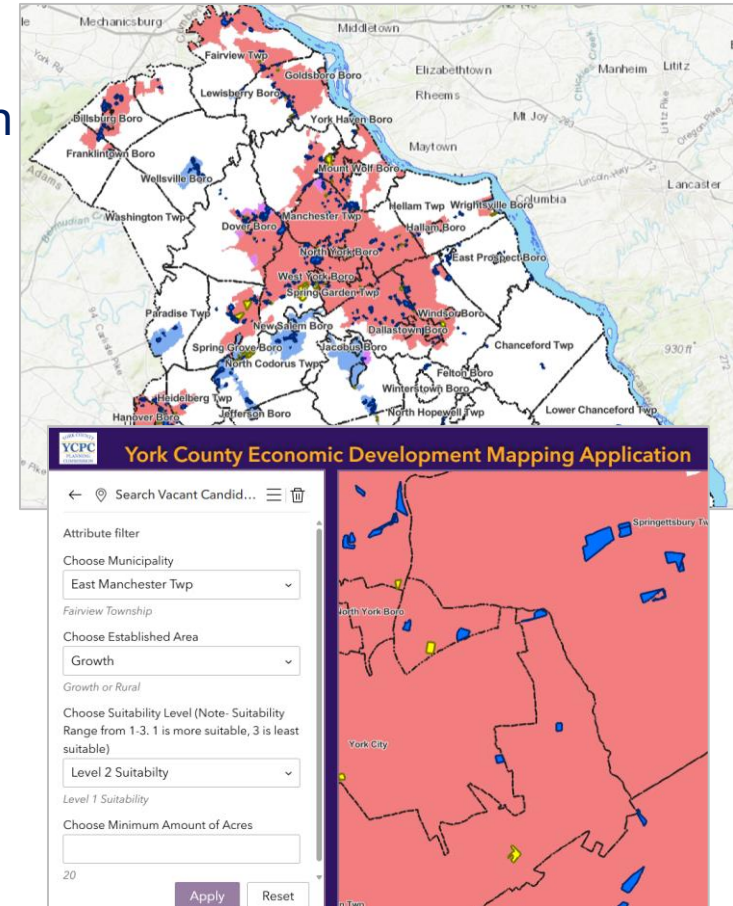
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Warehouse Development

- The Freight Advisory Committee brings together municipalities, elected officials, freight generation facilities, motor truck companies and advocacy groups, FHWA, PennDOT, environmental and alternative transportation groups, and others.
- In the first 1.5 years of the FAC we've focused on:
 - Trucking parking strategy, RFI and projections
 - Truck crashes and congestion mitigation
 - Empowering municipalities to evaluate proposals from a quality of life, public health and economic development perspective



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Warehouse Development

- An untapped opportunity is regional coordination.

Shippensburg University Center for Land Use & Sustainability Warehouse Development Event



*First Regional Freight Summit
October 28, 2025*

Regional Freight Summit		
Program		
Draft – 5/19/2025		
8:30am	Registration open	
9am	Opening/Welcome - YCPC Director	
	<ul style="list-style-type: none">• Overview of the Summit/Expectations/Set the Table• (Q&A)• Networking at your table?	
10am	Secretary Carroll – Charge? Priorities? Suggested topics for Sec	
	<ul style="list-style-type: none">• Federal Authorization, State Funding, State Freight Plan (Policy and Planning)	
11am	Breakouts #1	Moderator Speakers
	A. Enhancing State/Regional/MPD collaboration (transportation planning)	Mod: Mike Pritchard Sp: Jess Clark/Mike Rimer (tbd); ____, Maryland SHA
	B. Seeing Logistics 360: Shipper-Carrier-Municipality panel (land use/economic development)	Mod: Sp: ____; Bruce Vick, Hartman Trucking; Flo Ford, Jackson Twp

Attainable Housing



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Attainable Housing

Of the 2 year goals,
THE LEAST ADVANCED STRATEGIES
ARE IN THE AREAS OF

**INFRASTRUCTURE & BUILT
ENVIRONMENT (29%)**

RURAL ECONOMY (44%)

In 2023, we anticipate making significant
progress on two major actions within
these two strategies, including:

**LAUNCHING A COUNTYWIDE HOUSING NEEDS
STUDY AND STRATEGY AND EXPLORING
WAYS TO INCREASE THE CAPACITY OF
MUNICIPALITIES IN THE AREAS OF
REVITALIZATION AND ECONOMIC DEVELOPMENT**

STRATEGY 3

ENCOURAGE REDEVELOPMENT AND INCREASED DENSITY TO MAKE MARKET-RATE, WORKFORCE HOUSING MORE AFFORDABLE

As the population and demand for housing grows, residential zoning in parts of York County could be updated and modernized to allow for mixed use development, increased density, and other mechanisms that would reduce the cost of building, encourage redevelopment, and ultimately increase the number of available and affordable housing options for working families.

ACTION STEPS IMMEDIATE (0-6 MONTHS)

1. Complete an updated inventory of available York County and City of York RDA properties and hubs via the county's open data portal, creating a "living map" of York County that is technology based, accessible to the public, and user friendly.
2. Conduct a needs assessment to determine what housing is needed throughout York County. Engage the Land Bank and Redevelopment Authority. Conduct a gap analysis comparing the demand to the available inventory.
3. Launch an education and awareness campaign to reframe the term affordable and break down myths about who needs affordable housing. Highlight living wage workers and aging residents.
 - Include and contrast the definitions of gentrification, revitalization, and redevelopment.
 - Tap respected community organizations to participate. The YMCA came up as the most trusted organization in York City and also does relevant development work.
4. Explore employer-assisted housing programs with both large and smaller employers in the county, whereby an employer puts money into closing costs on homes that are developed nearby. The Realtors Association of York and Adams County explored this 10 years ago, and York College is engaged in this work. Highlight these examples as a great way to keep employers engaged in the community and keep communities livable for local inhabitants.
5. Develop a plan to increase homeownership throughout the city by making financing more available. Use this plan as a preventative measure to mitigate evictions and homelessness that will occur



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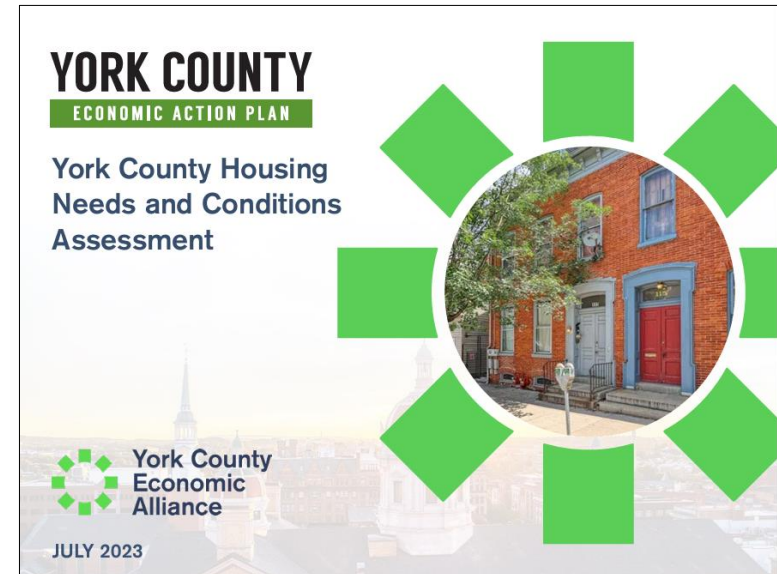


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Attainable Housing

Two Phase Process

- Phase 1:
 - Convene steering committee
 - Gather baseline data
 - Promote
- Phase 2:
 - Identify existing collaboratives and initiatives, as well as gaps
 - Develop and promote agenda of key initiatives to support housing partners
 - Advance new initiatives where appropriate



Attainable Housing

The York County Economic Alliance would like to thank the York County Housing Study Steering Committee and Focus Group participants for their support and guidance throughout the development of this Needs and Conditions Assessment.

Joyce Santiago, Affordable Housing Advocates

David Kalinoski, AARP

Kim Moyer, Berkshire Hathaway & Windsor Township

Colby Swartz, Burkentine Real Estate

Todd Bowser, Campbell Associates

Jada Richardson, City of York

Jason Phillips, Coldwell Residential Brokerage

Ruth Robbins, Community Progress Council

Pat Ball, CTY Consulting

Joshua Gropp, Elite Property Management

Doug Walters, Elite Property Management

Cory Erhard, Family First Health

Anthony Moore, Four Squares Development & Construction

Fred Walker, Four Squares Development & Construction

Tim Staub, HRG & Springettsbury Township Planning Commission

Jordan Ilyes, Ilyes Holdings

Heather Saylor, Inch & Co.

Dawn Squire, Lifepath Christian Ministries

Ben Myers, J.A. Myers Homes

Tim James, Manchester Township

Andy Shaffer, New Freedom Borough

Madra Clay, PA Department of Community & Economic Development

Tim Pasch, Pasch Companies

Rep. Kate Klunk, Pennsylvania House District (169th)

Sherry Welsh, rabbittransit

Shanna Terroso, Realtors Association of York & Adams Counties

Tom Englerth, Redevelopment Authority of the County of York

Dave Bode, ROCK Real Estate

Joshua Hankey, Royal Square Development & Construction

Alia Pillsbury, Tailored Real Estate

Marc Unger, Tenfold

Teresa Gregory, Traditions Mortgage

Amy Wannemacher, United Way of York County

Ann Kunkel, WellSpan Health

Kim Brister, WellSpan Health

Matthew Howle, WellSpan Health

Kelly Kelch, West Manchester Township

Jose Santiago, YMCA of the Roses

Seth Noll, Yoe Borough

Dominic DelliCarpini, York College of Pennsylvania

Vinny Cannizzaro, York College of Pennsylvania

Kelly Blechertas, York County Coalition on Homelessness

Adrian Buckner, York County Community Foundation

Jessica Mockabee, York County Human Services

Dory Bannon, York County Planning Commission

Felicia Dell, York County Planning Commission

Natasha Kukorlo, York Habitat for Humanity

Regina Mitchell, York Housing Authority

Dawn Hansen, York Township

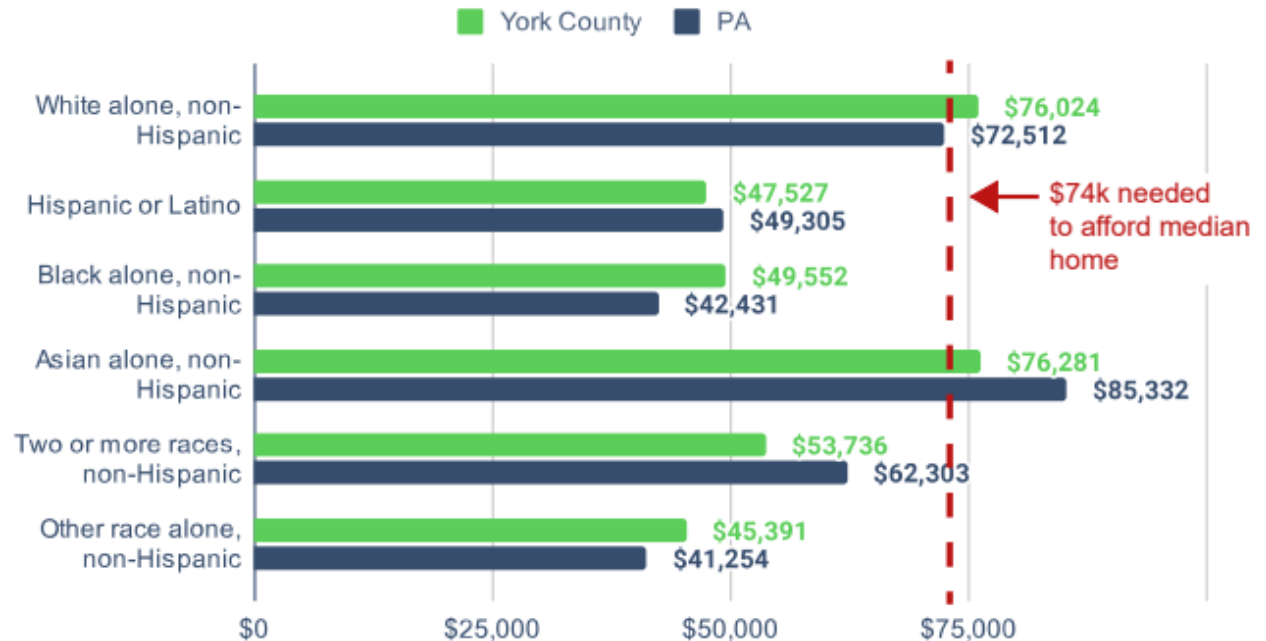
Silas Chamberlin, York County Economic Alliance

David Gonzalez, York County Economic Alliance



Attainable Housing

Only white, non-Hispanic residents and Asian, non-Hispanic residents have median household incomes (\$74K+) at the threshold to afford the median home in York County (\$245K).



Source: 2021 American Community Survey 5-Year Estimates



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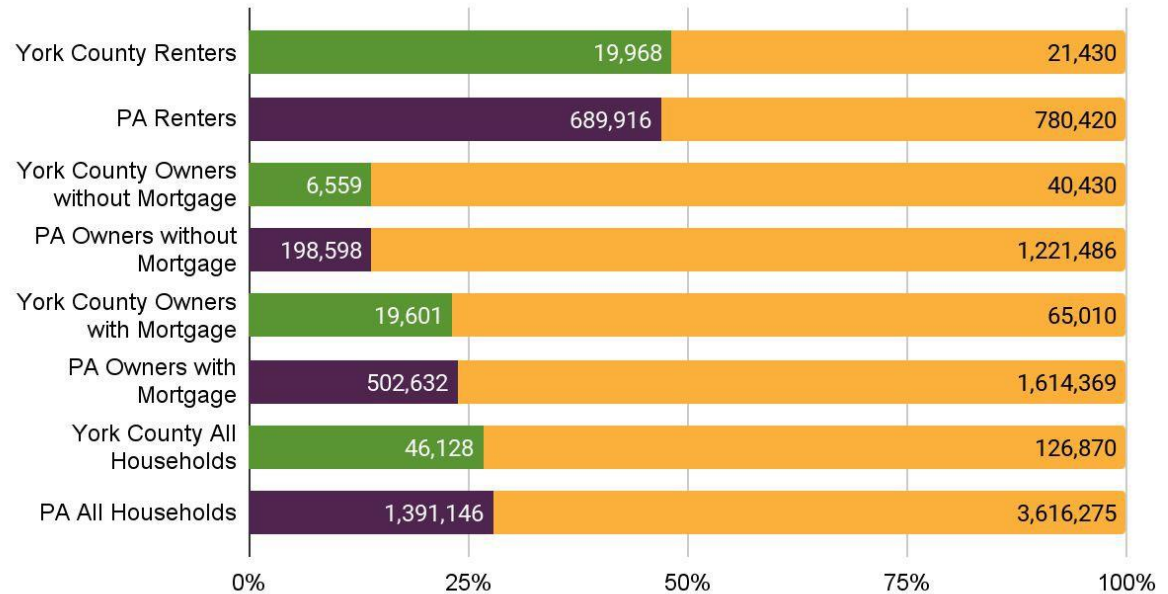
Attainable Housing

Nearly **half of all renters** and more than **1/4 of all households** in York County are considered **cost burdened**.

Approximately **20%** of York County residents are considered **severely cost burdened** (**9,624 owner households** and **8,800 renter households**).

This is most pronounced for **Latino renters and homeowners** in York County, 60% and 34% of whom are cost burdened, respectively. This is more than 56% of Latino renters and 29% of Latino homeowners at the state level.

Cost Burdened Households in PA and York County



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Attainable Housing

Since 2010, York County has produced new housing at an annual rate of less than half the pre-recession rate.

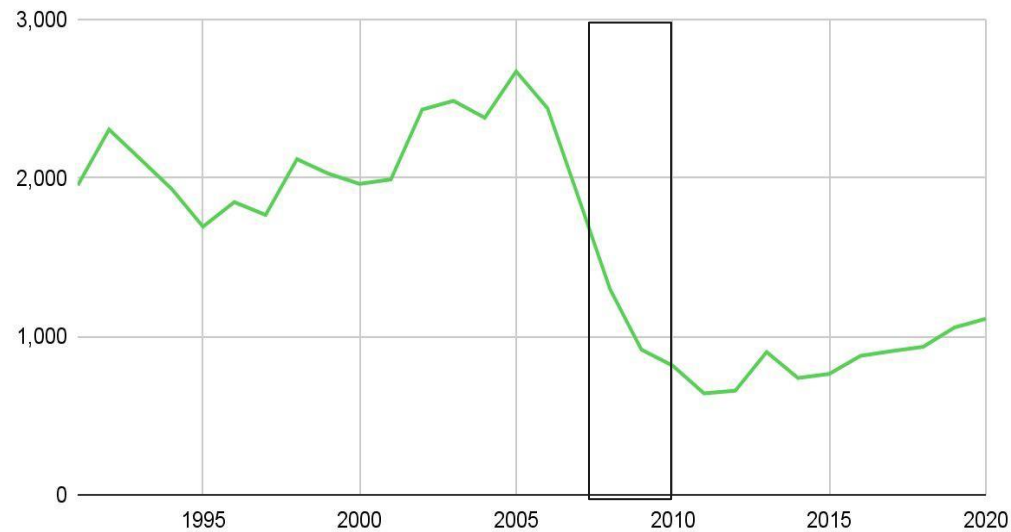
During the same period, York County's population grew 36%.

This decline stymied some of the continued sprawl we might otherwise have seen and allowed the County and its partners to preserve more than 64,000 acres.

But slow growth has also exacerbated the structure supply and demand issues within the housing market.

Number of Residential Building Permits by Year, 1991-2020

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Attainable Housing

Affordable at greater than or equal to 100% AMI



Affordable at greater than or equal to 80% AMI but less than 100% AMI



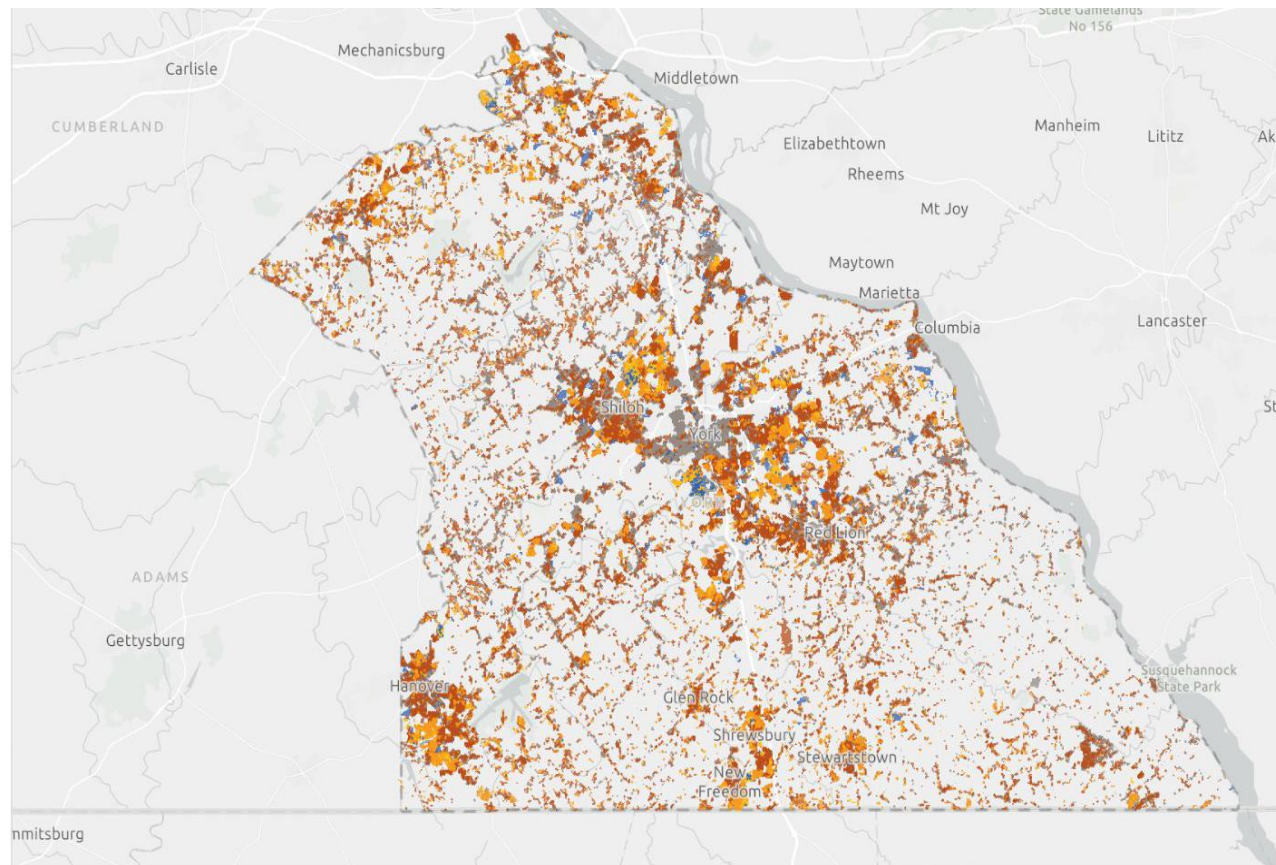
Affordable at greater than or equal to 50% AMI but less than 80% AMI



Affordable at greater than or equal to 30% AMI but less than 50% AMI



Affordable at less than 30% AMI



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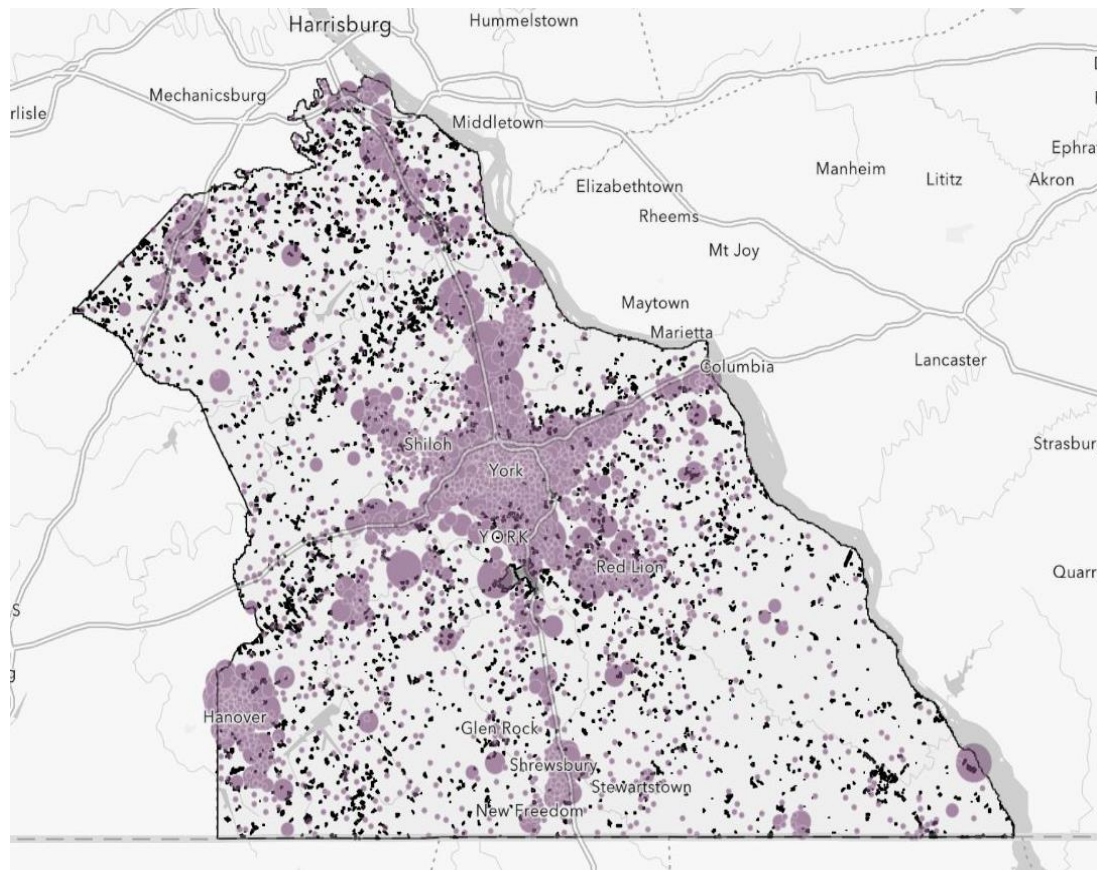
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Attainable Housing

This map shows vacant residentially zoned parcels **greater than or equal to 1 acre** in size, overlaid with the job centers for the region sized according to number of employees.

There are 3,643 vacant residential parcels, for a total of 11,355 acres.

Only 11 vacant parcels are greater than or equal to 10 acres in size, totaling 149 acres.



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Attainable Housing

- Produced a York County Housing Action agenda to encourage more coordination, advocacy and development related to attainable housing
- Developing a municipal playbook for pro-housing zoning and ordinances and talking points on the need for housing
- Encouraging and incentivizing naturally occurring affordable housing in York's 36 historic boroughs through redevelopment and new construction



York County Housing Action Agenda

- ACTION #1** - Support the goal of Friends & Neighbors of Pennsylvania, the York County Coalition on Homelessness, and other emergency shelter providers to develop a **permanent day shelter** in the City of York through strong advocacy to funders and other stakeholders. The day shelter will provide essential services and comfort to community members from throughout the county who are experiencing housing or essential service insecurity.
- ACTION #2** - Collaborate with Affordable Housing Advocates, York Housing Authority, LifePath, York County Stable Housing Collaborative and other housing support partners to develop a **housing stability continuum of care** that increases coordination between partners to deliver improved access to emergency housing services, enhanced financial planning, and clearer pathways to stable housing, which includes the development of an educational support program connecting tenants to responsible, private landlords.
- ACTION #3** - Invest **\$1,200,000** from the Whole Home Repairs program in training partnerships that create **pathways to in-demand construction careers**, in turn growing the capacity of the builder community for home rehabilitation, maintenance of York County's aging residential stock and new home construction.
- ACTION #4** - Support York County Planning Commission's (YCP) implementation of a federal **PRO Housing Grant** aimed at municipal outreach and education, to promote missing middle housing through zoning reform and model ordinances that help address housing barriers, including opposition to new housing development.
- ACTION #5** - Launch a quarterly **Housing Developers Roundtable** to provide a forum for information sharing and issue identification amongst the public and private residential development and construction community.
- ACTION #6** - Formalize discussions of **employer-invested workforce housing** and home ownership or rental incentives through **Welcoming Workplaces**, a collective of nearly 100 York County employers focusing on equity and workplace culture to attract and retain a talented workforce.

For more information on the York County Housing Study Partnership, please contact David Gonzalez, Director of Economic Initiatives at dgonzalez@yceapa.org or Silas Chamberlin, Chief Strategy Officer at schamberlin@yceapa.org. For updates on implementation of the Housing Action Agenda and to access the full York County Housing Conditions and Needs Assessment, please visit YorkCountyEAP.org.



Over the course of 18 months, a collaborative of 30+ housing stakeholders analyzed data and on York County's housing market and came to a consensus around these six strategies that would make a tangible improvement in housing attainability across the market.



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Outdoor Economy



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PA's Outdoor Economy

- **Economic Impact.** \$18.9 billion or 1.9% of GDP
 - 5% annual growth rate in last decade, including 10% from 2022-2023
- **Business Creation.** 9,000+ businesses directly supporting the outdoor economy
- **Employment.** 168,322 jobs generating \$8.6 billion in salary and wages
- **Tax Revenue.** \$1.9 billion in state and local taxes



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Chesapeake Watershed's Outdoor Economy

- **Total GDP.** \$45.4 billion
- **Total Employment.** 408,218

MD: \$9.4 billion, 81,615 employees

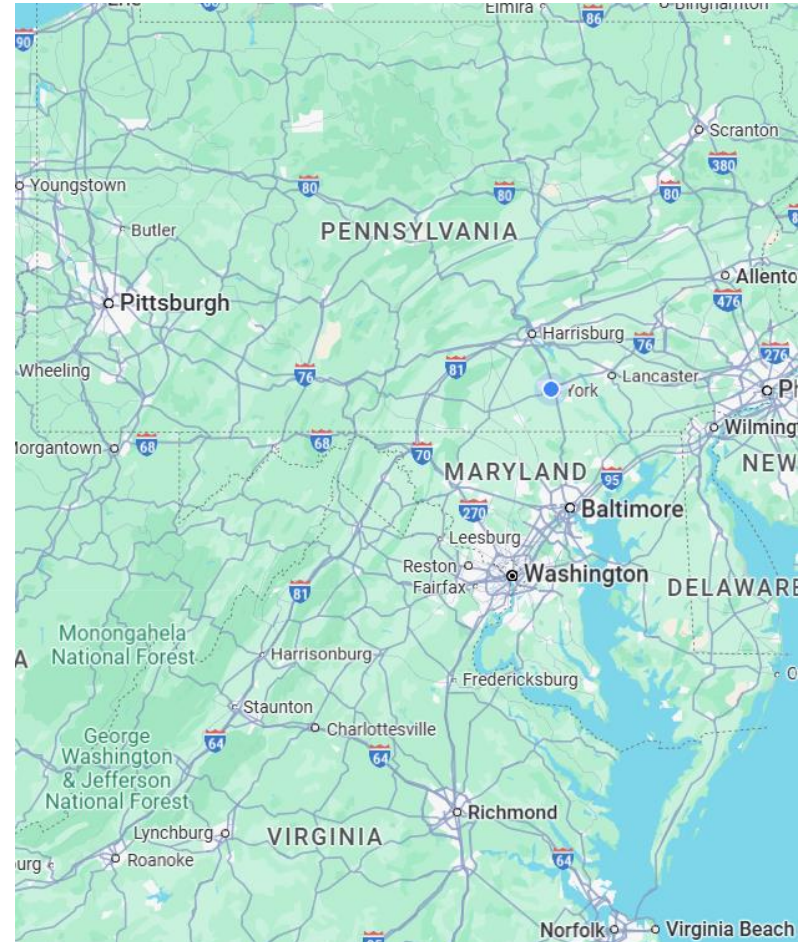
VA: \$13.4 billion, 122,405 employees

DE: \$1.6 billion, 15,550 employees

PA: \$18.9 billion, 168,322 employees

WV: \$2.1 billion, 20,326 employees

**November 2024 US Bureau of Economic Analysis, Outdoor Recreation Satellite Account*

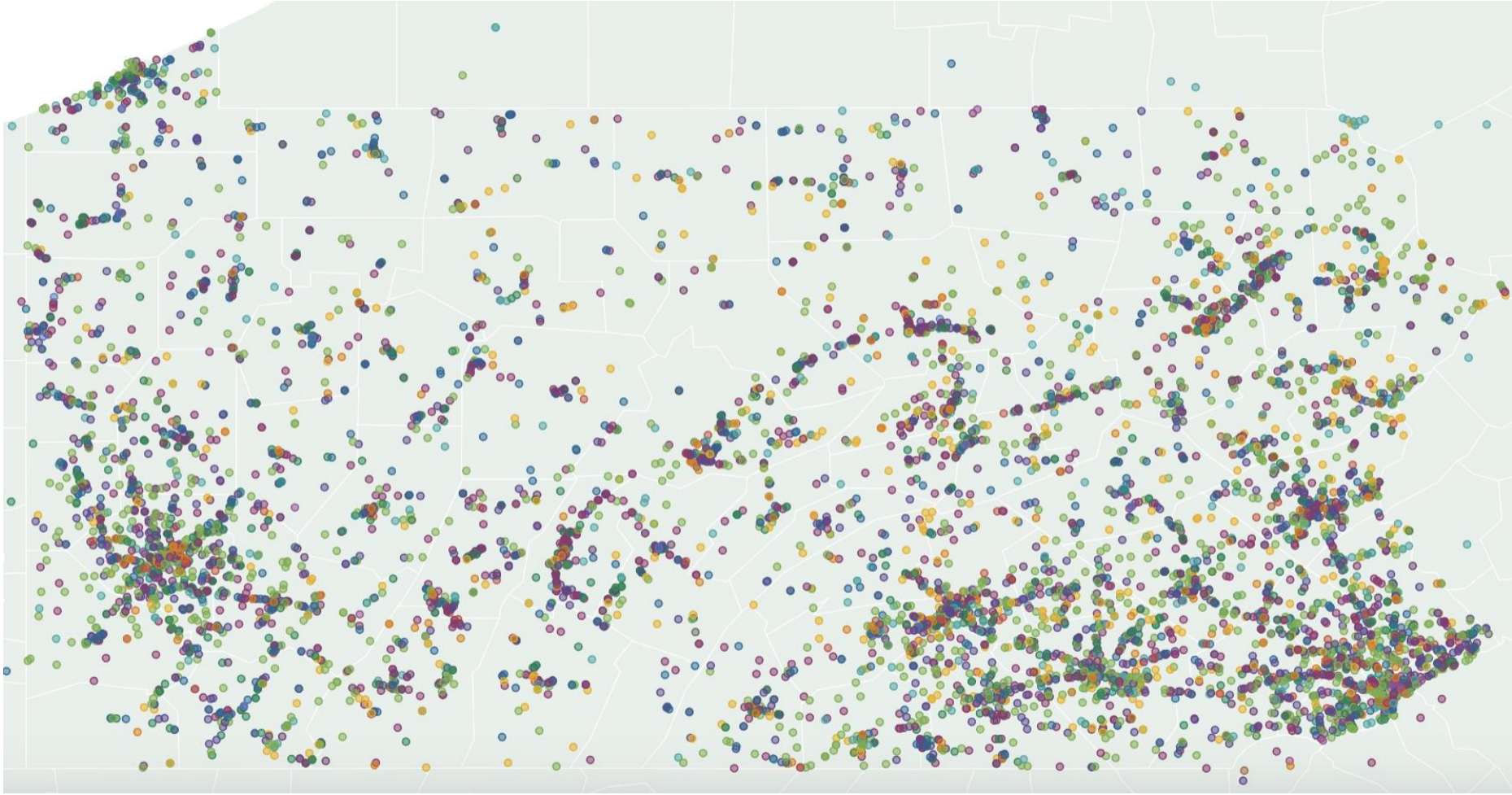


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Outdoor Economy Ecosystem



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York County's Outdoor Economy

- 5,240 York County residents are employed in the outdoor economy—a 14% increase since 2010. More than real estate, insurance, and financial services—combined.
- \$135 million in wages each year.
- York County's four state park units host 2 million visits every year, generate \$44 million in consumer spending, and sustain 420 jobs.



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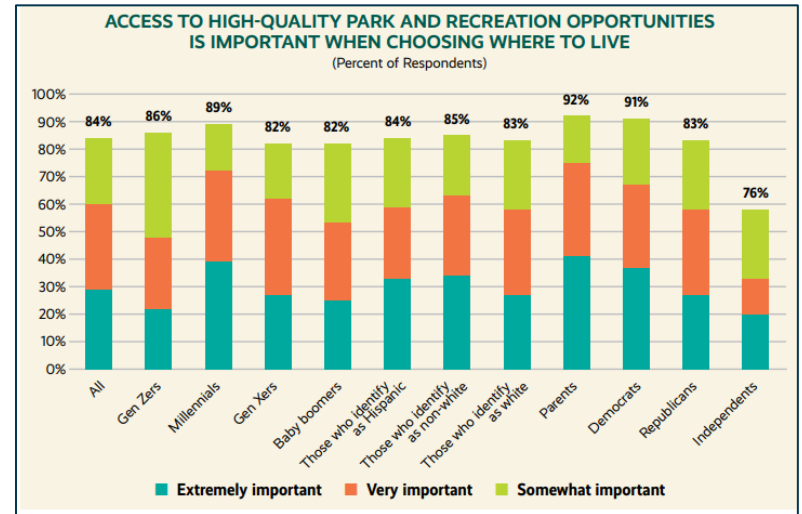


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Outdoor Economy Paradigm Shift

Talent and Business Attraction.

- Access to bike/walking paths is consistently a top 3 consideration for home buyers (National Realtors) across demographics and political persuasion (NRPA)
- 50% of recent college graduates say “place” is more important than job in their career search (HBJ)



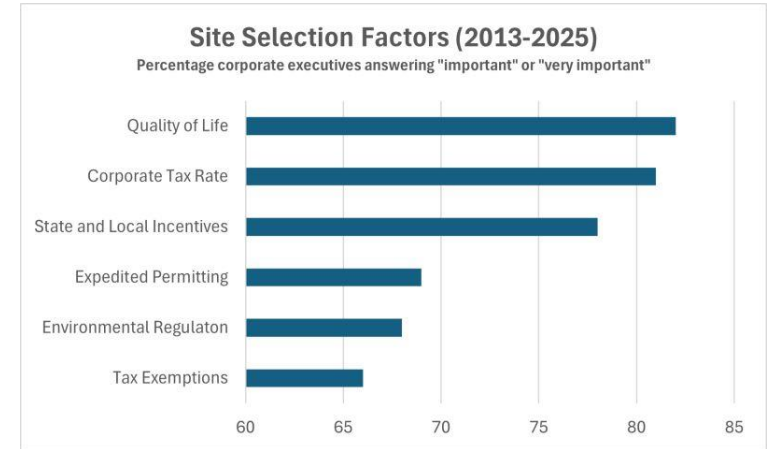
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Outdoor Economy Paradigm Shift

- Between 2013 and 2025, the highest ranked site selection factor by corporate executives has been quality of place.
- 82% say quality of life outranks corporate income taxes and financial incentives, when deciding on their next business location.
- Quality of life outpaced lax environmental regulations by 13 points and expedited permitting by 12 points.
- Since 2020, the number of corporate executives who consider quality of life important to site selection grew by 4 points to 86%, a full 20% higher than environmental regulations and 19% higher than expedited permitting.

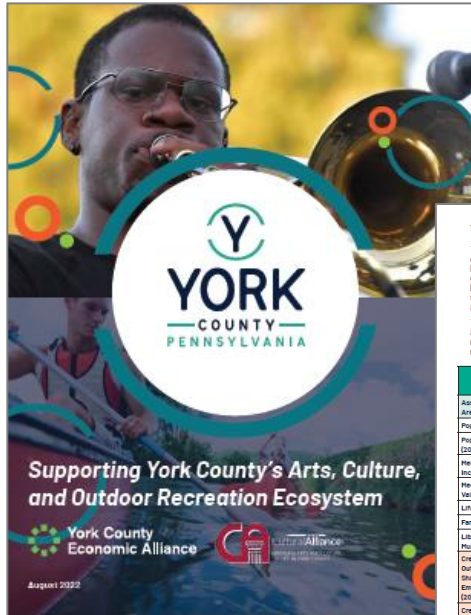


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Outdoor Economy Ecosystem



YORK COUNTY'S DATA PROFILE

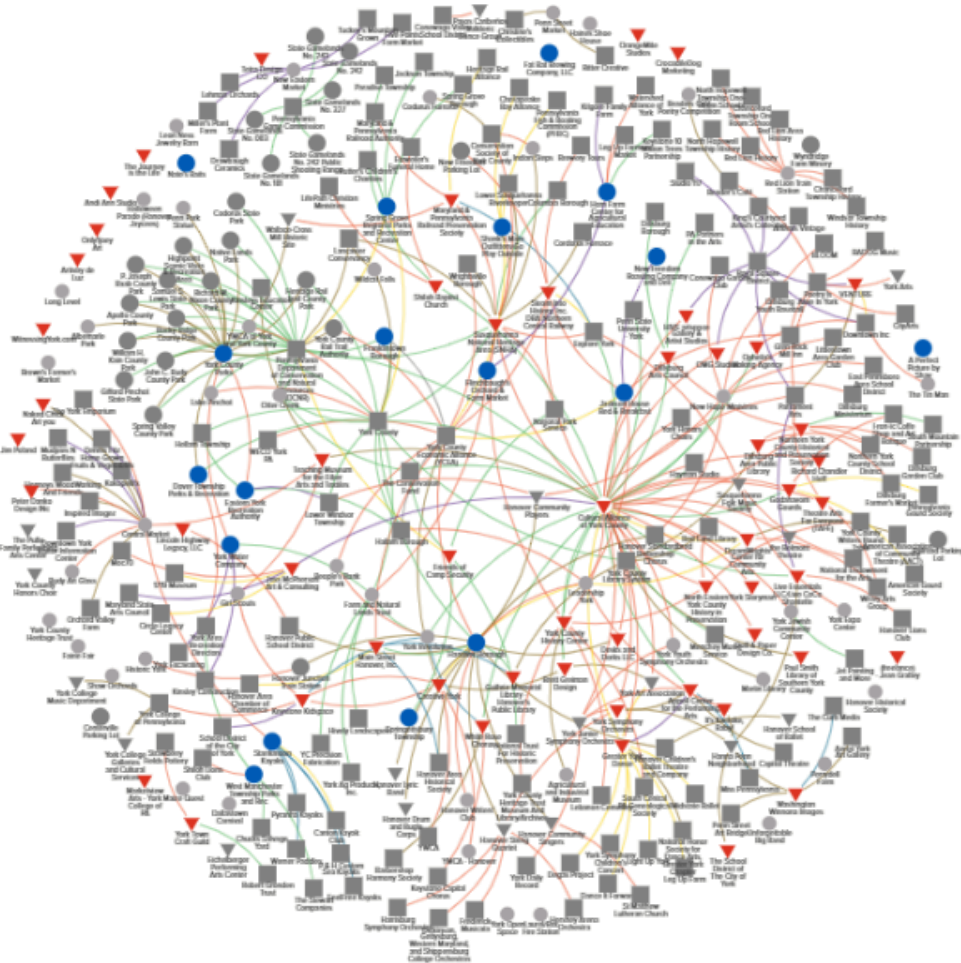
The following chart explores economic and demographic data for York County and six comparable communities, chosen for their relative similarities to York in characteristics like population size, growth, median household income, and/or median home value. Each of the profiled communities has a dedicated public funding source for supporting quality of life amenities throughout their counties. In the sections that follow, the linkages between the presence of these funding mechanisms and economic growth is explored, in particular as it relates to employment within the creative and outdoor sectors.

These sectors are composed of diverse industries, including performing arts, museums and heritage sites, arts education, design and architecture, film and television, sounds and radio, publishers and software design, golf and skiing facilities, marinas, campgrounds, recreational goods retail, and more (full list included in the appendix).

	York County, PA	Allegheny County, PA	Davidson County, TN	Washington County, MD	St. Bernard Parish, LA	Santa Barbara County, CA	Sioux County, ND
Associated Metro Area	York City	Pittsburgh	Nashville	Hagerstown	New Orleans	Santa Barbara	Flinn
Population (2010)	443,058	1,278,040	654,344	101,043	412,344	440,439	405,813
Pop Change (2000-10)	3.00%	-0.80%	31.60%	3.30%	28.30%	3.20%	-4.30%
Median HH Income	\$58,340	\$62,320	\$62,210	\$61,510	\$47,873	\$78,325	\$50,200
Median Home Value	\$161,800	\$161,800	\$217,400	\$221,700	\$192,800	\$84,300	\$110,500
Life Expectancy	78	77	78	78	78	81	76
Farmers Markets	0	23	14	4	1	15	0
Libraries/Museums	70	101	33	14	5	44	39
Creative/Outdoor Sector Share of Total Employment (2010)	4%	6%	5%	4%	13%	6%	4%
Creative/Outdoor Sector Share of Total Employment (2010)	5%	8%	7%	4%	5%	8%	4%
Creative/Outdoor Sector Employment (2010)	8,358	10,221	32,033	2,370	511	16,000	4,017
Sector Employment Change (2010-2010)	13.80%	19.50%	40.80%	15.30%	16.50%	36.00%	-4.50%

IMPACT / CASE STUDIES

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FOURTH ECONOMY



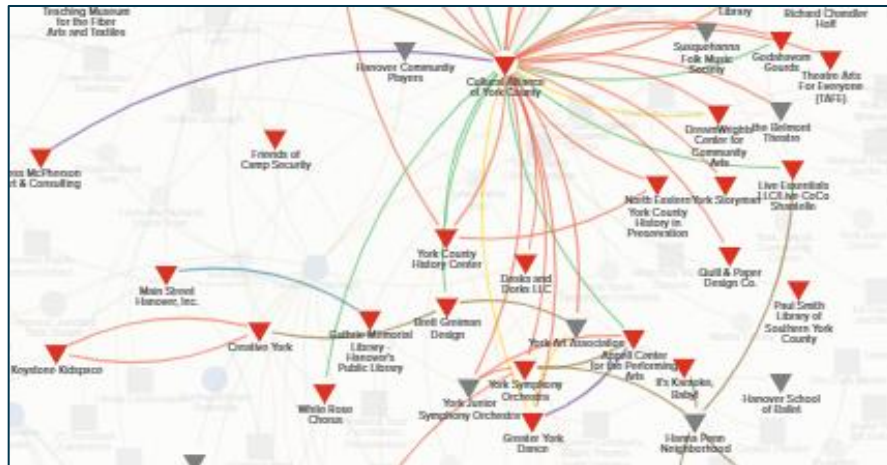
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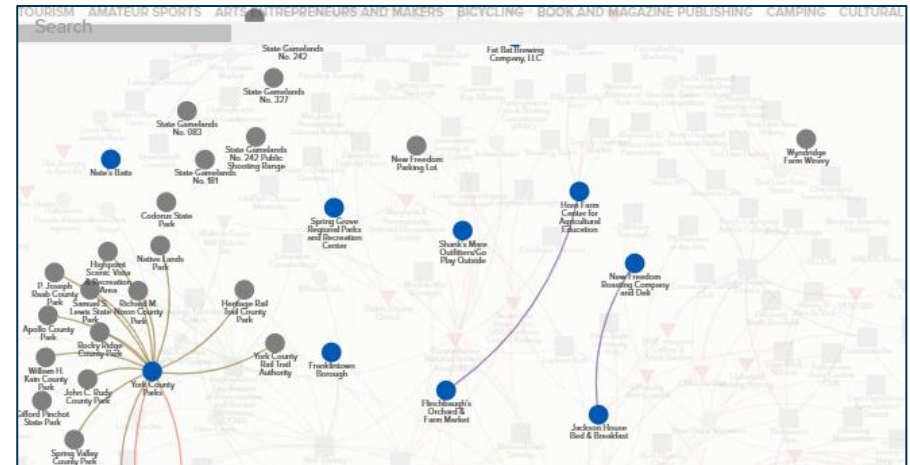
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Outdoor Economy Ecosystem

Cultural Sector Connectivity



Outdoor Sector Connectivity



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York County Economic Action Plan

Our 10-year EAP pivots our county's economic development strategy to emphasize people-focused and place-based initiatives, including:

- Promoting investment in arts, cultural and outdoor infrastructure, including parks, trails, and open space
- Building the capacity for placemaking countywide
- Rededicating resources to the county's 36 historic boroughs
- Documenting the economic impact of the outdoor and cultural economies

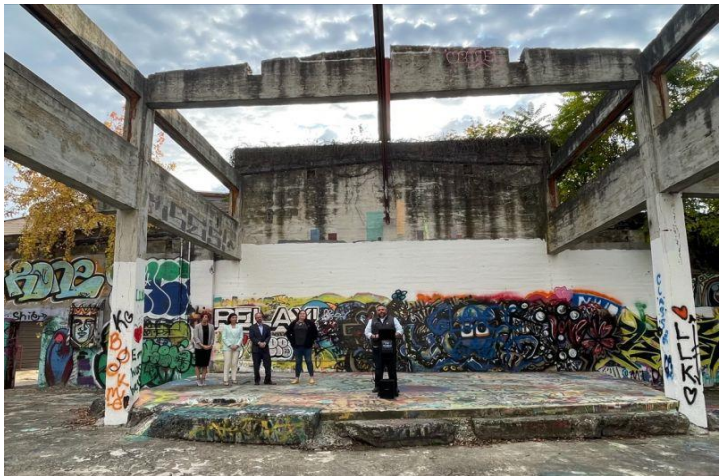


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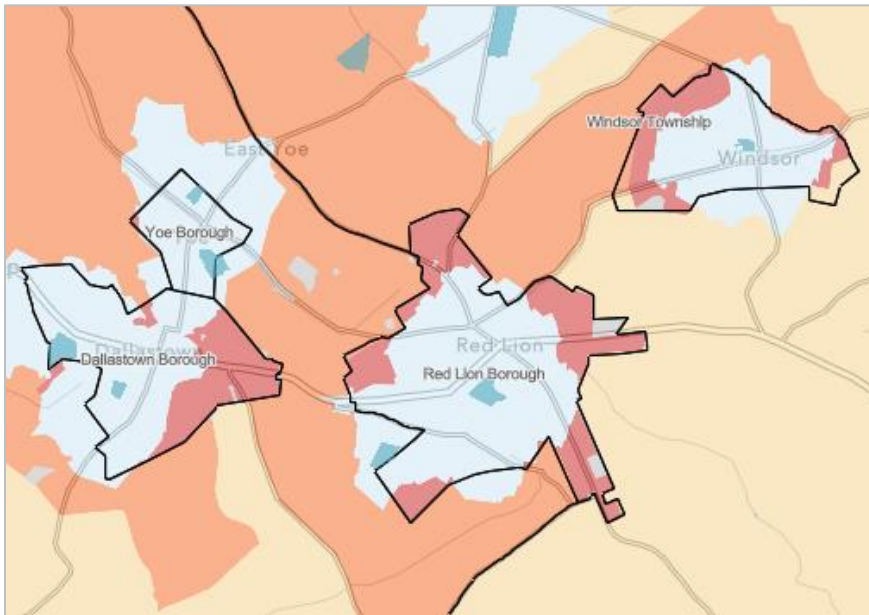
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York County Trail Towns



York County Trail Towns

Outdoor Asset Rich



Economic Inequity



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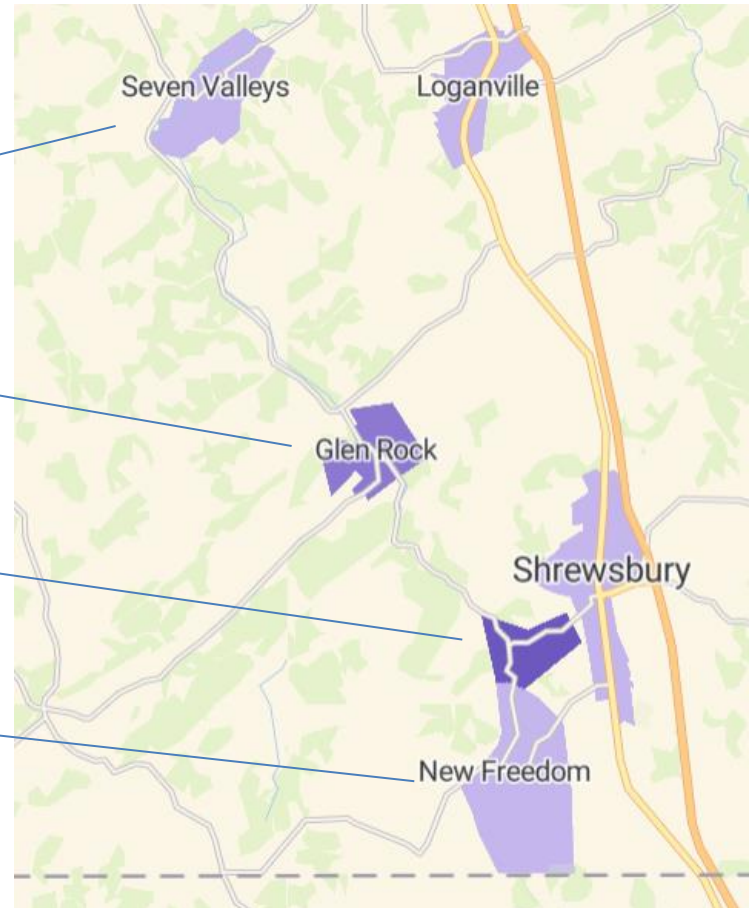
York County Trail Towns

Seven Valleys: 8% poverty

Glen Rock: 14% poverty

Railroad: 17% poverty

New Freedom: 5% poverty



Census tract average: 5% poverty

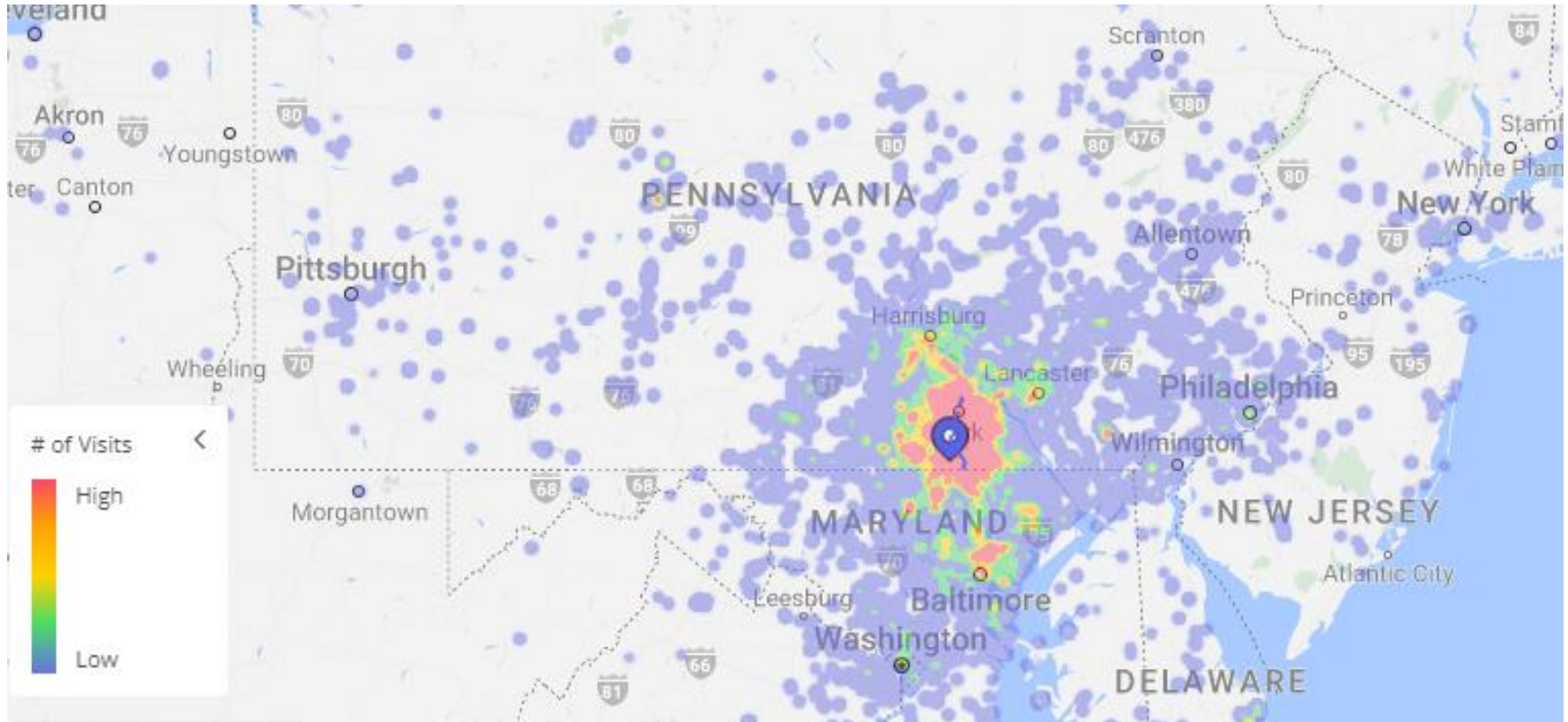


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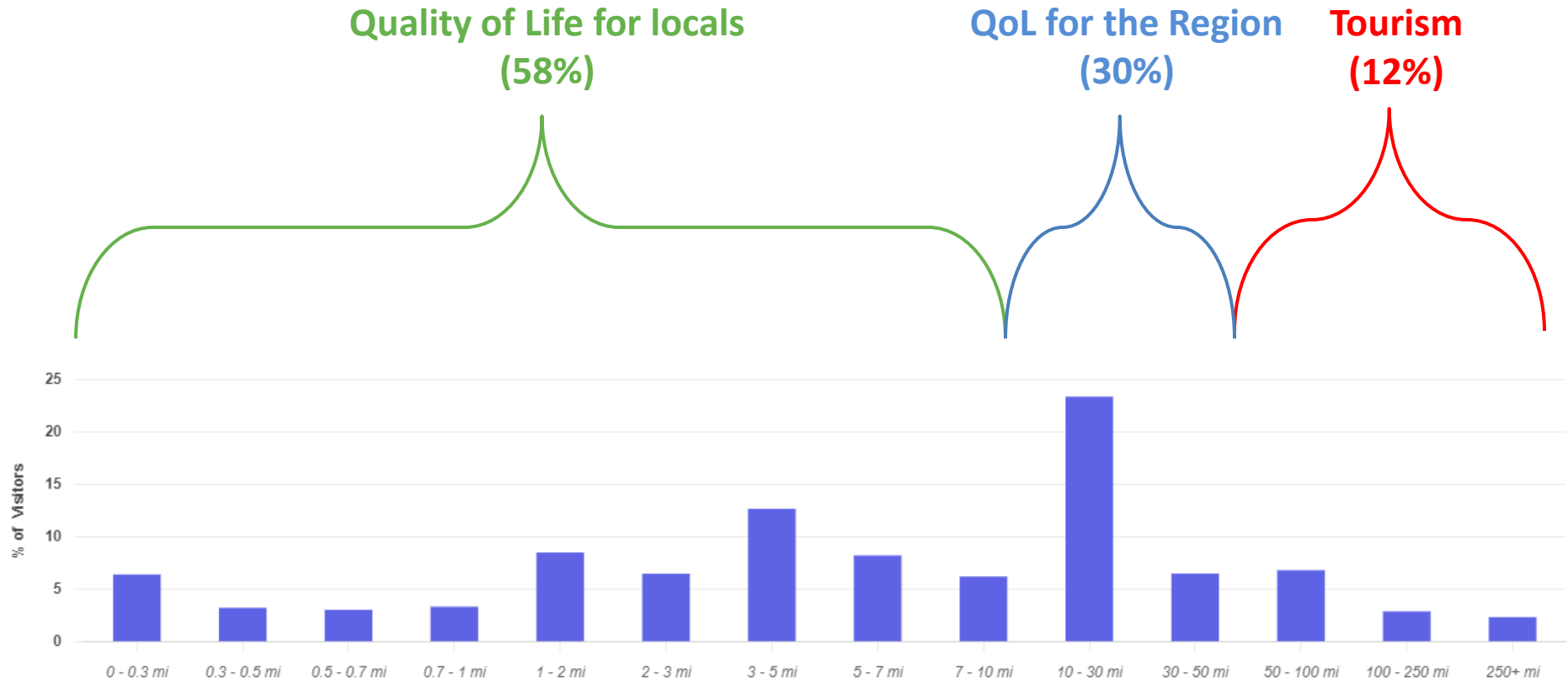
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Heritage Rail Trail Visitation



June 1, 2017 – June 1, 2024
All visitors > 10 minutes

Heritage Rail Trail Distance from Home



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Heritage Rail Trail Tourism Spending

$$20,657 \text{ visits} \times \$419 \text{ per visit} = \$8,655,283$$

Each year, the Heritage Rail Trail generates an estimated **\$8,655,283** in consumer spending from tourists alone, injecting revenue into local businesses.

(Even when 88% of all trail use is by those living in the region.)



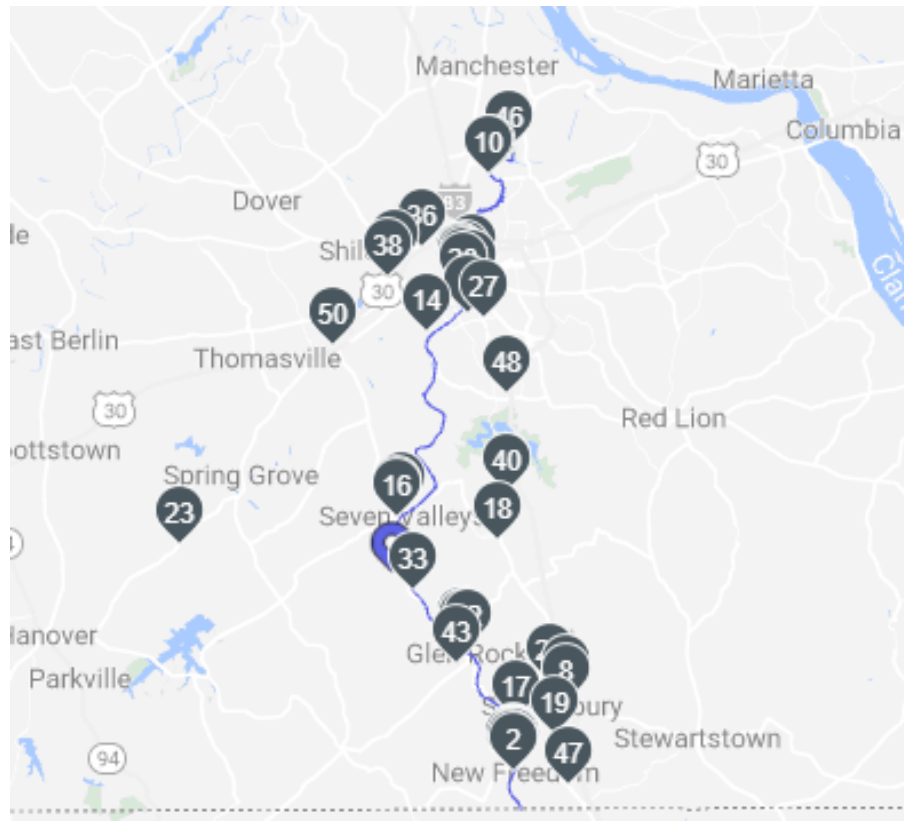
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Heritage Rail Trail Visitor Journey

A visual representation of the top 50 destinations reveals remarkable concentration of visits along the trail's corridor, indicating that trail users tend to visit local destination even when coming to the region as tourists.



June 1, 2017 – June 1, 2024
All visitors > 10 minutes



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Heritage Rail Trail Visitor Journey

Individual businesses benefited from trail-related patronage. For example, in 2023:

- Rutters Convenience Store (New Freedom) captured 2,175 customer visits.
- Seven Sports Bar (New Freedom) captured 2,241 customer visits.
- Glen Rock Mill Inn captured 3,272 customer visits.
- CS Convenience Store (Glen Rock) captured 3,800 customer visits.
- Valley Tavern (Seven Valleys) captured 1,904 customer visits.
- Paesano's Pizza (New Freedom) captured 2,348 customer visits.
- Main Street Market, a fresh food grocer (Glen Rock) captured 2,138 customer visits.

Most of these businesses, and others in the top 50 destinations, are located in York County Trail Towns and participate in the Trail Friendly Business program, which encourages trail user patronage.

2023 total visitation
All visitors > 10 minutes



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Business Impact

Seven Sports Bar (New Freedom) captured 2,241 customer visits in 2023.



IRISH BRUSSELS

Fresh Brussel sprouts flash fried and tossed with craisins and pecans in an Irish whiskey glaze.

\$13

MARGARITAS

Our house margaritas served on the rocks or frozen

\$6

\$19/customer X 2,241 customers =

\$42,579 in revenue from trail users in 2023.

Trail Town Business Resources

- \$139,000 grants made to 81 Trail Town businesses
- \$80,000 in façade grants within Trail Towns
- \$3 million in construction capital invested in Trail Towns projects
- 50+ Trail Friendly Business who commit to welcoming trail users
- \$6.7 million in financing now available via BLOOM CDFI with priority given to Trail Town businesses, women-owned businesses and businesses owned by people of color.



Trail Town Business Resources

**AleCraft Brewery
(Railroad)**



**Main Street Market
(Glen Rock)**



WE   **YORK COUNTY
TRAIL TOWNS**

4 YEARS OF SUCCESS

23 New Businesses Created
4 Businesses Retained

Breweries • Coffee Shops • Book Stores
Event Venues • Restaurants • Retail Stores
Fresh Food Markets / Micro Grocers

Trail-Friendly Business Program

Expanded to include 54 businesses across York County.
This program aims to improve visibility for businesses and
enhance goods and services provided to trail-users.

**Riverside Subs
(Wrightsville)**



**New Freedom Roasting Co.
(New Freedom)**



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Statewide Activity



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Place-Based Economic Development in York County, PA

Silas Chamberlin, PhD
Chief Strategy Officer
York County Economic Alliance

President
Firefly Outdoor + Economics



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