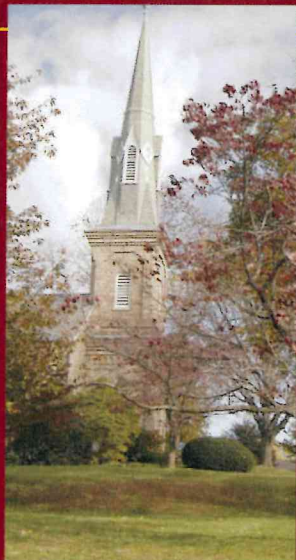


OLD YORK ROAD CORRIDOR IMPROVEMENT STUDY



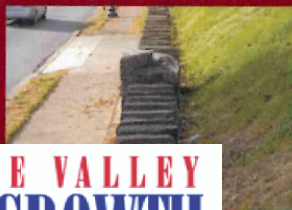
VITALITY



MOBILITY



COMMUNITY



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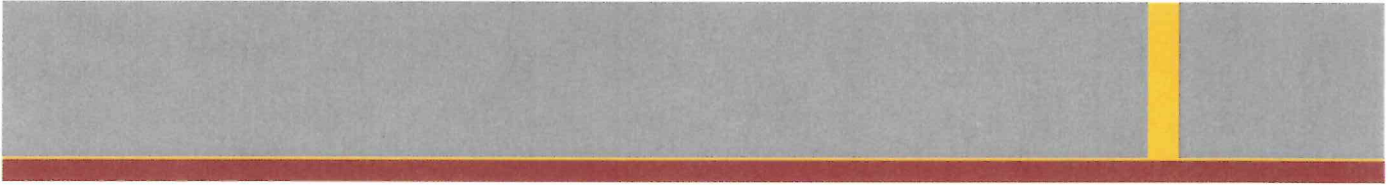
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EXECUTIVE SUMMARY

The Old York Road Corridor Improvement Plan is the product of a year-long study by Abington Township examining the current circumstances of the Old York Road (PA Route 611) corridor, a 2.5-mile-long segment of roadway and adjoining parcels of land from Rydal Road in the north to Moreland Road in the south, and advancing the linked causes of economic development, multi-modal mobility, and improved visual quality.

The impetus for the study was the Township's preparation of a new Comprehensive Plan, which recognized the significance of the Old York Road corridor to the economy, transportation system, and image of the community. From the Township's perspective, the Old York Road corridor has been underperforming as a setting for business and a reflection of character of the community and this has affected its tax base and its quality of life. In order to maximize benefits to Abington Township, measures need to be taken to improve the support the corridor offers for commercial, residential, and community activity.

The Old York Road Corridor Improvement Plan study process involved the oversight of a Steering Committee and technical work by a consultant team. The team documented existing conditions in the corridor and then, in cyclical fashion, explored a variety of alternative approaches with the Steering Committee that could possibly be applied in the corridor over the next five-to-twenty years. This exploration of alternatives was open ended, and a variety of ideas were probed. At various points in the process, public information meetings and stakeholder interviews were held to achieve broad input into the ongoing discussions from residents, business operators, and other interested parties.

The exploration of alternatives revealed both the possibilities and limitations for development and redevelopment along the corridor. An availability of land for additional development is present, although the area is highly developed already. There are potential market prospects, but these will need to be actively pursued in the context


of regional, national, and international trends. Transportation improvements are possible, but not necessarily easy to implement.

With respect to land development, opportunities for "infill" development on vacant and underutilized sites along the corridor are present. A greater intensification and mixing of land use on parcels is also possible.

Access and parking are challenges along the corridor. A tightly-constrained right-of-way is relatively consistent along Old York Road through Abington Township. The model for a successful traditional "Main Street" shopping district includes on-street parking on both sides of the street, as well as generous-width sidewalks, and pedestrian amenities such as street trees. The inclusion of all of these Main Street features would necessitate giving up moving lanes of traffic, a condition that conflicts with Old York Road's widely-accepted role as a major commuter corridor.

Traffic congestion and broad societal changes occurring as a response to higher energy prices and changing demographics prompted a look at the role of alternative transportation modes. The need for improvement to pedestrian and bicyclist facilities, a reorganization of the operations of the existing Abington Township Shuttle, and a potential expanded role of the existing R-3 Noble and R-2 Crestmont Regional Rail train stations for commuting and for accessing Center City Philadelphia, were examined. In particular, the presence of passenger rail service along the corridor is believed to present the opportunity to establish a mix of transit-oriented land uses in close proximity to the stations and to reduce reliance on single-occupant vehicle trips in the future life of the township.

Early on in the process it was proposed that, given limited fiscal resources and the complex property ownership and land use conditions of a dynamic corridor, wholesale change for the entire 2.5-mile-long corridor could not, and should not, be done all at once. A more realistic approach



would be to choose spots—to determine the portions of the corridor with the greatest potential and target these areas for development and investment. Eventually, as these strategic successes occur, they can be utilized to leverage improvements along the balance of the corridor. This approach was supported through Steering Committee endorsement of four target or priority areas along the corridor.

From south to north, a first priority area was recognized near the intersection of Old York Road and The Fairway. Several key attributes contribute to the potential of the area, including the following aspects:

- Access to the area and to Center City Philadelphia by way of the R-3 Regional Rail service to/from the Noble Station;
- Significant parcels of vacant and/or underutilized land;
- Concentration of existing retail activities;
- Effective depth of the corridor through the access provided laterally by The Fairway;
- Position of the area to be able to act as a gateway into Abington Township from the south.

The next priority area was designated near the intersection of Old York Road and Susquehanna Road. Conditions at this intersection that are favorable include the following elements:

- Historic ambiance;
- Existing locally-oriented businesses;
- Nearby school district and assisted living facilities;
- Availability of vacant and/or underutilized land.

From Keith Road to Edgehill Road was specified as the third priority area. The advantageous circumstances of this area include the following attributes:

- Underutilized land;
- Concentration of existing retail activities;


- Proximity to large institutions, including Abington Memorial Hospital and the campus of Penn State Abington.

The northernmost priority area was delineated between Chester Avenue and Old Welsh Road. Important conditions here include the following features:

- Linear extent of existing small businesses;
- Presence of Crestmont train station;
- Underutilized land.

In the exploration of alternatives phase, different ideas for each of the four priority areas were looked at, although thematic ties between priority areas were important. For example, sets of mobility and land use opportunities consistent with some broader concepts about the future of the township could represent a theme to be applied along the corridor at each of the four priority area locations. Such themes included notions of sustainability, healthy living, creating an Abington Town Center, reinvigorating local institutions, and broadening the types of commerce found along the corridor. The cyclical process by which the Steering Committee could look at alternatives allowed for a gradual narrowing to a “preferred” alternative for each of the priority areas and the identification of an overall framework for the future evolution of the entire corridor. Such a framework would offer the best opportunity for long term mobility, quality of life, and economic wellbeing in the corridor.

The Corridor Improvement Plan reflects the convergence on preferred alternatives in the form of recommendations for the corridor as a whole and for each priority area. Corridor-wide recommendations include steps toward providing visual continuity and improved mobility along the corridor, and incorporate consolidating access points, planting street trees, landscaping medians, repairing curbs, undergrounding overhead utility lines, enhancing transit stops, and improving conditions for pedestrians at intersections and along the length of the corridor. When implemented, the common



physical elements of the streetscape will provide visual unity for the entire two-and-a-half-mile-long corridor and make it a safer and more comfortable place for all modes of travel.

For the Noble Fairway priority area, recommendations are to create a new mixed-use, walkable, center for Abington Township focused around the Noble train station. Proposed new streets expand upon the existing roadway network and contribute to making the station more accessible and to making the area more walkable. The Fairway is proposed to be transformed into much more of a “Main Street” environment, with mixed-use buildings, wide sidewalks, and landscaped medians and verge areas. Proposed land uses include a mix of residential, retail, office, community, open space and recreational elements. Buildings are proposed to be built up to the street with structured parking and off-street parking lots located in the rear.

Recommendations for the intersection of Old York Road and Susquehanna Street are to establish a small, neighborhood-oriented, commercial crossroads that provides services to residents and to the patrons and staff of the nearby Abington High School, Sunrise Assisted Living, Abington Presbyterian Church, Abington Free Library and Abington Township Municipal Building. Reconfiguration of the cartway and properties on the northwestern corner will facilitate improved vehicular and pedestrian circulation. New “infill” businesses proposed include small offices, cafes, restaurants, hobby shops, book stores and educational facilities.

London Center area plans focus on accommodating residential and hotel uses identified in the market analysis as having strong demand and building on the success of existing business such as Target, Abington Pharmacy and the Kitchen Bar with additional, similar uses. London Center is recommended to include a wide mix of uses arranged in a walkable setting as an important destination for Abington


Township residents for eating and drinking, shopping, entertainment, living and working.

Recommendations for the Roy Rubicam area include both transportation and land use changes that are intended to improve pedestrian and vehicular safety while creating a village-like environment with retail uses that serve nearby residents. Properties along Old York Road are proposed to be redeveloped into mixed-use, multi-story buildings. Roy Avenue is recommended to be realigned so that both east and west portions meet at a signalized intersection along Old York Road, providing safe pedestrian crossing. Rubicam Avenue is proposed to be converted to a bicycle-and-pedestrian-access only way between Old York Road and the Crestmont train station and a new open space along the eastern side of Old York Road is recommended to provide an airy green space amid a highly built-up area.

The recommendations do include many aspects that may be begun immediately, even while further planning studies occur to determine the feasibility of certain actions. A two-pronged effort is required, one to implement more tangible recommendations, the other to continue to study longer-term planning and urban design ideas.

The Implementation Strategy that concludes the Plan lays out a step-by-step set of actions for Abington Township and its planning partners to pursue. The highest priority is the establishment of a Priority Area Task Force to guide the implementation process. Its appointment and commencement of work should begin immediately. The rest of the implementation strategy in the Plan represents a “best guess” as to how to phase in the recommendations of the Plan, but this will need to be messaged over time by the Task Force as it responds to various market, fiscal, environmental, and situational circumstances.

Taken all together, the recommendations for the corridor as a whole and for the priority areas



the promise of a better future, but the cost of some of the public improvements would be high and the time required to implement them could be lengthy. Abington Township is anxious to get started on something soon even if an initiative would not deliver a full package of features such as contained in many of the alternative concepts.

Chapter Six contains the Old York Road Steering Committee's concluding comments regarding the public process behind the Study, along with vision qualifications that clarify the context of how individual site development relates to global improvement change and the intended future synergy of the corridor. Any analysis of the study's specific recommendations should be treated with reference and sensitivity to these remarks.

PROJECT BACKGROUND

PROJECT BACKGROUND

The primary purpose of the Old York Road Corridor Improvement Study is to define a comprehensive vision to guide the economic, functional, and aesthetic future of the Old York Road corridor. The study area is a 2.5-mile-long corridor along Old York Road, a major arterial that runs north-south through Abington Township. Serving as both Main Street to township residents and as access between Center City Philadelphia and northern suburbs, the Old York Road corridor offers daily commuter vehicular passage and a local and regional draw to the corridor's commercial and institutional services. This dual identity, coupled with the physical complexities of the study area, have created a corridor with multiple, if sometimes competing, functions. A comprehensive transportation, land use planning, and market analysis study is needed to determine the best economic approach for the corridor's long-term viability and to organize the physical components of the corridor to provide a logical, practical, and attractive environment.

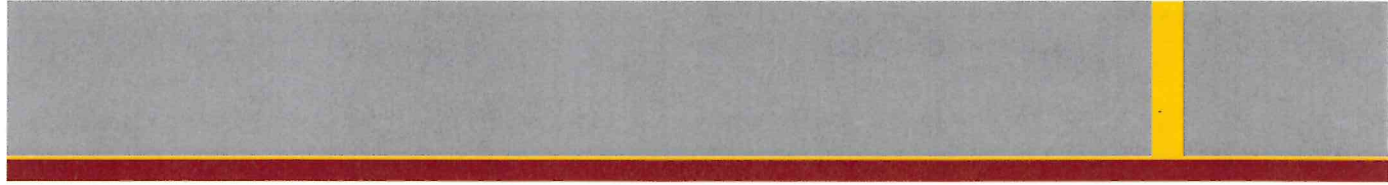
The Old York Road Corridor Improvement Study takes place at a timely planning stage for Abington Township. In 2007, Abington Township Commissioners adopted a new Comprehensive Plan for the township. The Plan describes visionary concepts for the township with regard to managing growth in a smart way by strategically balancing land use and transportation goals in a way that improves the quality of life in Abington. The Old York Road Corridor Improvement Study applies these recently adopted planning concepts in a way that defines physical improvements in real locations along the corridor, and identifies the strategic implementation steps to realize the recommendations.

PROJECT COORIDOR

As with many state highway corridors passing through older, "first ring" suburbs, the Old York Road corridor has felt the effects of the country's shift from urban centers to suburban living during the latter half of the 20th century. As populations moved out to the suburbs, an increased reliance on vehicular travel, over other modes, strained traffic capacities on community Main Streets. Corridors were widened to accommodate additional and faster-moving traffic sometimes leaving minimal, if any, pedestrian amenities. Businesses now tend to locate in suburbs where new residential neighborhoods indicated a strong market demand and large commercial development parcels offered flexibility and the opportunity to maximize surface parking spaces. This paradigm left many older suburbs' long corridors with small parcels, fragmented shopping districts, high traffic demands, and a dwindling pedestrian presence.

The Old York Road corridor has been more fortunate than most of these corridors. Its inherent assets have kept Old York Road a regional and local retail destination as well as an effective vehicular passage route. The study area is characterized by wooded, rolling terrain offering periodic views of building pinnacles piercing through treetops and architectural assets such as the former Strawbridge & Clothier building and many colonial style dwellings. Abington Township has done much to ensure developer and business owner interests in the corridor through various incentive programs including BRIC, grant and loan funding for façade and property improvements, and special tax incentives. The Township has also supported operational and aesthetic improvements such as "undergrounding" utilities, streetscape improvements, and New Vision guidelines for business corridors.

Important shopping centers exist at the intersection of Old York Road with London Road and Old York Road and The Fairway, providing large, anchor stores that attract shoppers to the



corridor. Existing bus and rail services connect the corridor to the region. And community facilities such as the Abington Library, the Abington Township Building, and numerous attractive churches and synagogues contribute to the livability of the adjacent neighborhoods.

A variety of SEPTA transit facilities are located within the corridor. The SEPTA R3 commuter rail line, operating between Center City Philadelphia and West Trenton, New Jersey, crosses the corridor at the southern end, near The Fairway. The Noble train station is located just north of the boundary with Jenkintown Borough and south of the Fairway. Additionally, the R2 Warminster commuter rail line parallels a portion of the corridor in the northern part of the study area and the Crestmont Station is located about two-and-a-half blocks north of the Old York Road corridor, near Roy Street.

The SEPTA bus route 55 runs the length of the corridor connecting south to Center City Philadelphia and north to Doylestown. Bus stops are located every one or two blocks.

PROJECT PROCESS

The study consisted of four major phases: Identifying Opportunities, Visioning, Draft Plan, and Final Report. Three streams of activities, comprised of Land Use Planning and Urban Design, Circulation, and Market Analysis elements allowed for parallel investigations relevant to each respective stream, while at the same time emphasizing cross-referencing and interaction among the streams in the course of the work through the four phases. The Final Old York Road Corridor Improvement Plan represents a full integration of the recommendations of the Plan relative to Land Use Planning and Urban Design, Circulation, and Market Analysis.

The study planning process was guided by a Steering Committee (SC) consisting of representatives from Abington Township Board of Commissioners, Abington Township staff,

Abington Township Planning Commission, Abington Memorial Hospital, Penn State Abington Campus, and Eastern Montgomery County Chamber of Commerce. SAC members, as well as other residents and business operators in the corridor, took part in focus group and interview activities to inform the land use planning and urban design, market analysis, and circulation components of the project (see the inside cover for names of SC representatives).

The first phase, Identifying Opportunities, included meetings with the SC, focus groups and interviews, a site tour, and an analysis and mapping of the existing conditions. The second phase, Visioning, included several rounds of exploring various themes for the corridor's future. Upon defining the preferred framework for the future of the corridor, the team worked on the Draft Plan. The project process was completed with the fourth phase, the Final Report.

The planning process included three Town Meetings with Abington residents. The first Town Meeting was held on March 19, 2008 and included a summary the Identifying Opportunities phase. The second Town Meeting was held on July 23, 2008 and included a review of the Visioning Phase and resulting Preferred Concept. The final and third Town Meeting was held on November 5, 2009. Each Town Meeting included a presentation of the recent project status followed by a question and answer period with attendees. The second Town Meeting included a workshop session in which attendees were given an opportunity to work directly with Steering Committee Members and the consultants on planning issues.

Abington Township staff maintained the website www.oldyorkroad.net with project updates throughout the project process. The website included project process information, illustrations at critical milestones throughout the process, and video of each of the Town Meetings.

Simultaneous to the Old York Road Corridor Improvement Study, the region's Metropolitan Planning Organization, Delaware Valley Regional Planning Commission (DVRPC),

CHAPTER 1

Regional Planning Commission (DVRPC), conducted Phase 1 of the Routes 611 and 263 Corridor Study in Montgomery County. This study included the interconnected 9- and 12-mile corridors along Route 611/Route 263 (Old York Road and Easton Road) in eastern Montgomery County which includes parts of five municipalities including Abington Township. As the DVRPC study includes the Old York Road Corridor Improvement study area as part of their study, the planning team was in frequent contact with DVRPC staff to coordinate the finding and recommendations of each study. Members of each study spoke on the phone and e-mail,

attended each others' respective meetings, and met for specific coordination meetings.

The final outcome of the planning process is this report, with a focus on Recommendations for the corridor (Chapter 4) and an Implementation Strategy (Chapter 5). These chapters are combined with ones that outline Existing Conditions (Chapter 2), and Market Analysis (Chapter 3).

Table 1.1 illustrates the process followed in the study.

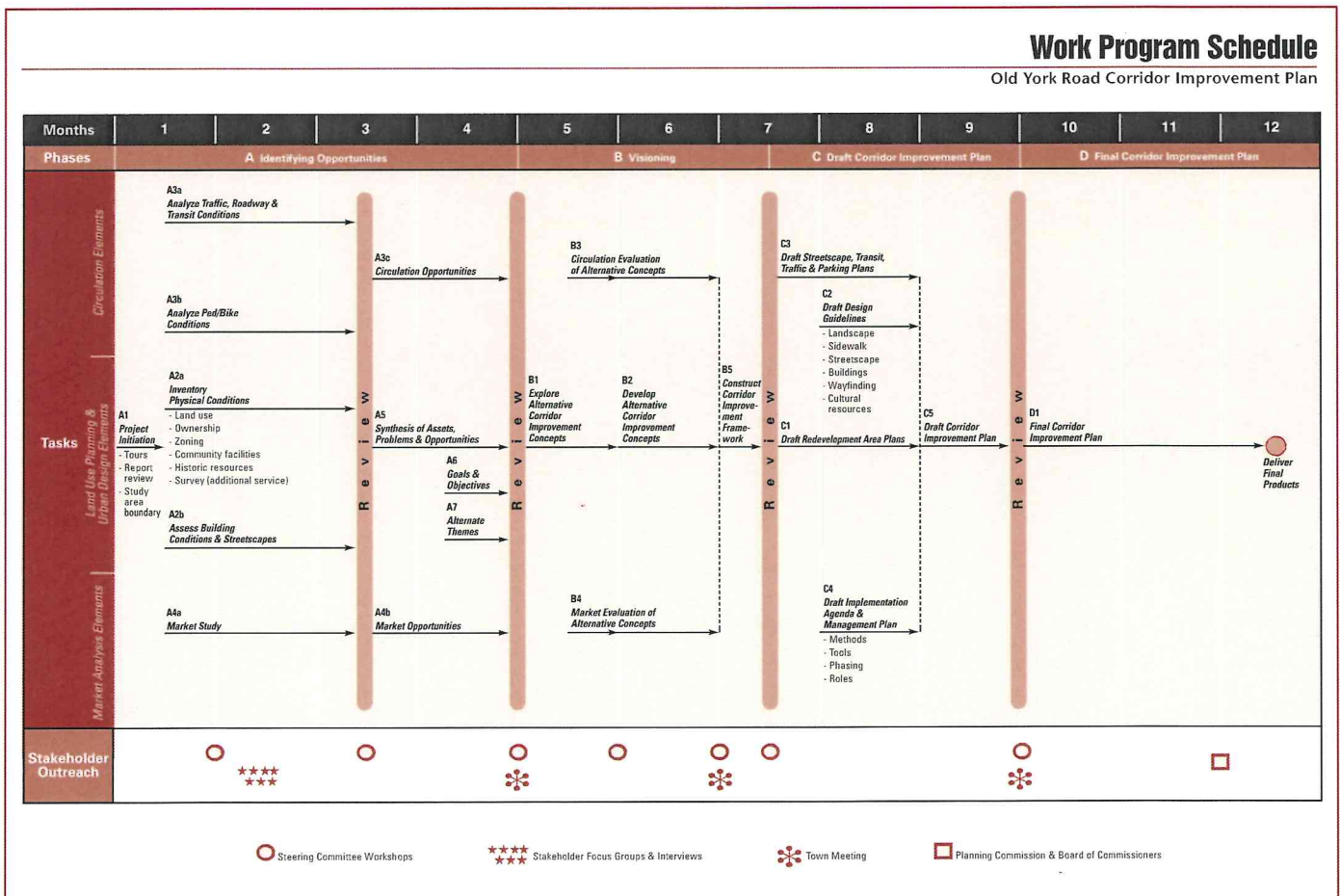
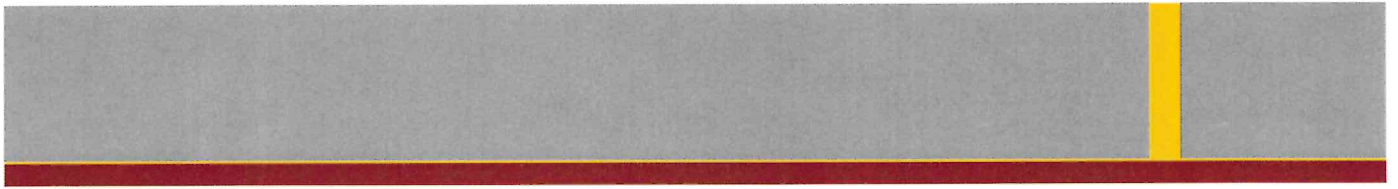


Table 1.1 Work Program Schedule



EXISTING CONDITIONS

During Phase A of the Old York Road Corridor Revitalization study, the corridor has been examined to develop an understanding of existing physical and market conditions (Figure 2.1). Previous planning studies were reviewed, data was compiled from various sources, and field investigations were conducted. Existing conditions are documented in the form of maps, photos, and written descriptions on the following pages (Figure 2.2).

EXISTING LAND USE

The Existing Land Use map illustrates how land is currently used in the study area (Figure 2.3). Land uses directly adjacent to Old York Road are predominantly of a commercial nature, with institutional uses interspersed along the corridor. A medical-related institution, Abington Memorial Hospital, is very prominent. Away from Old York Road, residential uses are widespread, particularly single-family detached residential uses.

The following land use categories have been used to describe the use of parcels within the study area:

1. Residential – Single Family Detached
2. Single Family Detached – Under Construction
3. Residential – Single Family Attached
4. Residential – Multi-Family
5. Residential – Age Restricted
6. Retail
7. Office
8. Auto Sales
9. Mixed-use
10. Institutional
11. Industrial
12. Open Space
13. Transportation
14. Vacant
15. Utilities
16. Golf Course


Beginning at the southern end of the study area, land use categories along the portion of Old York Road near the Noble Train Station are predominantly retail, with a mix of office and auto sales uses. This area contains five different auto dealerships.



The Noble Town Center contains numerous retail businesses. Stein Mart and Old Navy are two examples of the national chains in this location that draw patrons from Abington Township and the surrounding municipalities.

Perpendicular to Old York Road is The Fairway, a collector road with a median that is bordered by auto dealerships (mentioned above), as well as retail, office, and multi-family residential uses. The character of The Fairway is predominantly commercial, including the Baederwood Shopping Center.

North of The Fairway on Old York Road, additional national-chain retail establishments exist, but then the character of the corridor shifts to institutional uses. Near the intersection of Old York Road and Rydal Way is the Abington Free Library and further north are other institutional uses such as Abington Presbyterian Church and its cemetery, YMCA, Township Municipal Building, and Abington Memorial Hospital (AMH). AMH consists of several substantial structures, including Levy Medical Plaza, Lenfest Pavilion, and Toll Pavilion on both sides of Old York Road.



Interspersed between these institutional uses are a wide range of small commercial and office uses.

North of the hospital the character of Old York Road changes to predominantly retail land uses, anchored by Abington Towne Center and Abington Shopping Center on the east side of the street. Within these two shopping centers are stores that include Target and Giant Super Food. On the west side of Old York Road are several small retail and office properties, and those extend to the south toward AMH and to the north to Edge Hill Road.

North of Edge Hill Road the corridor continues to support retail activities but at a smaller scale than that found in the more southerly portions of the corridor. Many of the businesses are in structures that originally had residential uses but have been converted into small office or retail establishments.

EXISTING ZONING

Along the corridor of Old York Road, Abington Township has designated twelve zoning districts as per the Zoning Ordinance document adopted in May 1996 (Figure 2.4). These districts are as follows:

1. Low Density Residential (R-1)
2. Low-Medium Density Residential (R-2)
3. Medium Density Residential (R-3)
4. High Density Residential (R-4)
5. Apartment Office (AO)
6. Town Commercial (TC)
7. Planned Business (PB)
8. Special Commercial (SC)
9. Mixed-Use (M)
10. Community Service (CS)
11. Suburban Industrial (SI)
12. Recreation/Conservation

Residential designations are located off of Old York Road, with the higher density designations

closer to the retail uses fronting the corridor and then a decrease in density occurring farther back from the corridor. R-1 Residential is the category farthest away from the corridor on the eastern side of the study area. According to the Zoning Ordinance, this designation is meant to “provide low density, single-family, neighborhoods.” Located just off the southwest portion of the corridor, the R-2 Residential designation “provides for low density, single-family, neighborhoods which lie adjacent to or among one acre residential zoning districts.” The R-3 Residential districts appear east and west of the corridor just south of Edge Hill Road. They are meant to “provide single family dwelling units on medium sized lots.” R-4 Residential districts appear both east and west of the corridor north of Edge Hill Road and “provide single family dwelling units on high density lots.”

The Apartment Office (AO) zoning designation is not common for properties along Old York Road and only appears in parts of the former Rydal Waters development area and where new hospital expansion recently occurred. Apartment Office is meant to “provide locations for appropriate high density, residential/apartment land use, and limited office/professional land use in areas of the Township which, by virtue of their location, highway access, or unique site characteristics provide a logical use of land for such needs and services and which are appropriate to neighboring residential properties.”

Town Commercial (TC) designates the west side of Old York Road at the southern end of the corridor, with the east side of the street being part of Jenkintown Borough. The TC designation also appears on both sides of Old York Road from Susquehanna Road to Horace Avenue. The Town Commercial districts intent is to “establish standards for smaller neighborhood shopping areas which consist primarily of small retail shops, small personal care businesses, and professional office uses that may adequately function in isolation to anchor stores and planned associations of larger scale business activity.”

The area near the Noble Station and The Fairway has a Planned Business (PB) designation. Planned Business districts are “focal point areas for large scale commercial activity, which serves the needs of both local neighborhoods and surrounding communities.” The other portion of Old York Road that is designated Planned Business occurs north of AMH, from the hospital to Edge Hill Road. This Planned Business section includes the Abington Shopping Center and Abington Towne Center.

The Special Commercial (SC) zoning designation stretches along both sides of Old York Road from Edge Hill Road until the township boundary at East Moreland Road. Special Commercial districts are meant to “provide for a variety of commercial establishments and service businesses that offer specialized goods or services to markets generally greater than the immediate local neighborhood.”

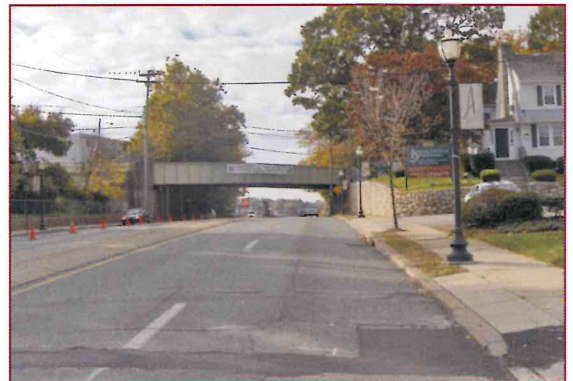
The Community Service (CS) designation has been applied to two locations along the corridor, the first being in the area of the Free Library, YMCA, Abington Presbyterian Church and the Baron-Rowland Funeral Home. The other CS zoning designation is in the Municipal Building and Abington Memorial Hospital area, including the properties across the street from these institutional uses. The Community Service designation is meant to “provide for the educational, medical, recreational and religious needs of the Township community.”

The Recreation/ Conservation (RC) zoning designation is intended to “protect and conserve the natural areas that comprise the Township.” This designation is applied along the corridor at the Abington Township War Memorial located between Old York Road and Old Old York Road near Temple Beth-Am.

The Mixed-Use (M) and Suburban Industrial (SI) zoning designations do not appear directly on the corridor but are present in other portions of Abington Township.

NATURAL FEATURES

The Old York Road corridor is located in the Piedmont Providence of the Appalachian Upland. Driving along the corridor, one is distinctly aware of the topographical changes of gently rolling hills, and the presence of old growth, canopy trees growing some distance off of the corridor (Figure 2.5). While native woodland areas exist elsewhere in the township, the Old York Road study area has for decades been utilized as an urbanized area and very little native landscape is present along the corridor.



SLOPES

Grades along the Old York Road corridor study area vary by over 160 feet. Three high points exist along the Old York Road corridor. One is just east of Horace Avenue, on the Abington Memorial Hospital site (approximately 350 feet above sea level). Another is at Edge Hill Road (approximately 380 feet above sea level), and the third is at the northern end of the study area near the intersection with Berrell Road (approximately 340 feet above sea level). The lowest spot along the corridor is at the southern end of the study area, near the SEPTA R-3 rail corridor (approximately 220 feet above sea level). Traveling south to north, the topography starts at the lowest elevation, rises to one of the corridor’s high points just east of Horace Avenue,

lowers with a slight decrease in elevation near the Abington Towne Center Shopping Area at London Road, rises again to the high point at Edge Hill Road, lowers in elevation to a point near Roy Avenue, and rises again to the highest elevation along the corridor at Upper Moreland Road.

Slopes along the corridor are generally slight to moderate. There are no slopes greater than 25 percent along the corridor. Five areas of moderately steep slopes, slopes between 15 percent and 25 percent, exist along the corridor including the following:

- Halfway between Mадiera Avenue and Rodman Avenue to the R3 rail line;
- Harte Road to the corridor's split with Old, Old York Road;
- Jericho Road to Edge Hill Road;
- Halfway between Penbryn Avenue and Hamilton Avenue to halfway between Hamilton Avenue and Roy Avenue;
- Near Berrell Avenue.

FLOODPLAINS

A 100-year floodplain, which runs perpendicular to the corridor, cuts through the Old York Road study area near Roy Avenue. Much of the floodplain is the Roy Avenue public right-of-way, to the west of Old York Road. Ten properties along the Old York Road are affected by this floodplain.

There are no floodways on Old York Road within the study boundary.

WETLANDS

There are no wetlands on Old York Road within the study boundary.

HYDRIC SOILS

There are no hydric soils on Old York Road within the study boundary.

COMMUNITY AND HISTORIC FEATURES

The Old York Road corridor is the central focus for community resources within Abington Township. Community facilities include municipal services, medical and health facilities, religious facilities, educational facilities and childcare, and adult care and living facilities (Figure 2.6).

COMMUNITY FEATURES

■ Municipal Services

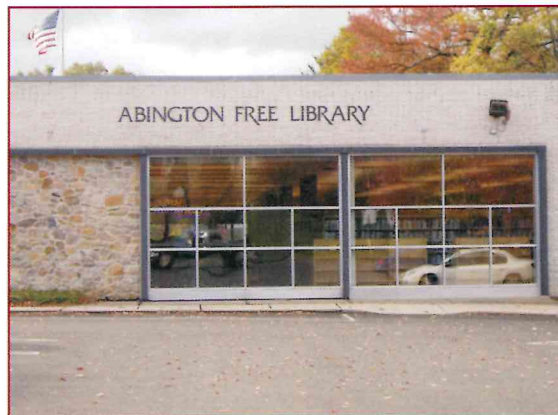
The Abington Township Municipal Building is located on the southwest corner of the intersection of Old York Road and Horace Avenue. The Township Building houses the offices of all of the Township departments,



and the meeting room for the Township Commissioners.

The Township Building includes the Abington Township Police Department. The Police Department is organized into four major divisions: Patrol Division, Detective Division, Community Policing Division, and Administrative Division. Public Safety support services located in the building include an Emergency Management & Planning Unit and the Fire Marshal's Office.

The Abington Fire Company is located on Horace Avenue, just off the corridor. The fire company is one of five companies that make up the Abington Township Fire Department. The other companies are: the McKinley Fire Company, the Weldon Fire Company, the Edge Hill Fire Company, and the Roslyn Fire Company.



The central resource facility of the Abington Township Public Library is located at 1030 Old York Road, between Old Orchard Road and Adams Avenue. The library also sponsors community programming, including teen and adult literacy programs.

The Abington Post Office is located one block west of the corridor on Keith Road.

■ Medical and Health Facilities

Abington Hospital occupies the largest street frontage along Old York Road. The hospital's five properties along the corridor total 29.95 acres. Abington Memorial Hospital is an independent, 570-bed, acute care teaching hospital with a medical staff of more than 800 physicians and 5,000 employees. The hospital has the only Level II accredited trauma center in Montgomery County and includes specialized services in cardiac care, cancer care, maternal child health, and surgery.

Access for emergency vehicles occurs at the intersection of Old York Road and Horace Avenue. Parking for students, outpatients, and staff are largely accommodated by the hospital parking garages located at the corner of Old York Road and Horace Road, at Keith Road and Old York Road, and in a parking garage located within the Levy Medical Plaza across the street from the main hospital facility. Overflow parking exists on an AMH-owned lot on the east side of Old York Road and on the Meals on Wheels site located on the east side of Old York Road, just north of the hospital. Parking for the hospital also occurs on side streets adjacent to and near the facility.

A YMCA facility is located on the east side of Old York Road, just south of the intersection with Susquehanna Street. The facility includes a number of health and fitness programs for youth,



adults, and seniors, and has a swimming pool, day care, after school programming and camps. According to focus group discussions, parking for the facility may be inadequate, especially during evening and weekend hours.

■ Religious Facilities

The Old York Road corridor has three centers for worship along the corridor, including the following:

- St. Anne's Episcopal Church, at the northwest corner of the intersection with Old Welsh Road;
- Abington Presbyterian Church, at the southwest corner of the intersection with Susquehanna Road and;
- Beth Am Temple, fronting along Old Old York Road.

These centers act as community centers in Abington and present a strong architectural and historic presence along the corridor.

Several additional religious facilities are located within a half mile of the Old York Road corridor.

■ Education and Childcare

While no public primary or secondary education facilities are located immediately on the Old York Road corridor, there are a number of facilities located within approximately one-half-mile of the corridor. The presence of these educational facilities generally indicates that students and their families may utilize, or cross, Old York Road at the start of the school day (generally around 8 am) and again at the end of the school day (generally around 3 pm). The presence of students can be apparent in vehicular, pedestrian, bicyclist, and school bus modes. Abington Township School District facilities located within approximately a one-half-mile of the corridor including the following:

- Highland Elementary School;
- Overlook Elementary School;
- Huntington Junior High School (athletic fields and bus storage only);
- Abington High School, and;
- Abington Junior High School.

The presence of students along Old York Road is particularly relevant as it relates to the Penn State Abington Campus located about a quarter of a mile east of the corridor on Woodland Road. Students of this campus of the Pennsylvania State University live off-campus and most come from some distance away. With over three thousand full- and part-time students and no on-campus housing, students travel to and from campus throughout the week-day and evenings by various modes.

A lack of on-campus parking has created the need for off-campus parking. The campus operates a shuttle bus system that picks students up at a number of locations, including the Rydal train station and the parking lot of the Abington Towne Center (used for university parking by special agreement with the owners of the shopping center).

A private nursery school, the Jenkintown Day Nursery, is located at the intersection of Hilltop Road and Baeder Road, just off of the corridor. This day nursery has been in the Abington Township area for over 100 years and participates in the Pennsylvania subsidized day care program, keeping the program affordable for families of all income levels.

■ Adult Care and Living

Adult care and living facilities are located adjacent to the Old York Road corridor. A senior living facility, Sunrise, is located east of the corridor on Susquehanna Road. Additionally, Rydal Park is located further east down Susquehanna Road at the Fairway Valley. These facilities offer care for adults at varying stages of mobility and independence.

Senior programs are also located at the YMCA and the Abington Public Library, as described previously in this section.

HISTORIC FEATURES



Historic features and community facilities are important cultural elements for Abington Township. Along the corridor are sites identified on the National Register of Historic Places (NRHP), sites under consideration for the NRHP, and certain buildings or locations identified by the Township as being of historical significance. The sites are listed below:

- **Old Abington Township High School** – This property is the only one on the NRHP and is located at the intersection of Old York Road and Susquehanna Road.
- **Abington YMCA** – This historic building is eligible for the NRHP designation, was built between 1913-1915 and is still being used today as a YMCA in its original purpose.
- **Abington Presbyterian Church and Graveyard** – This property is identified by the Historic Preservation Committee as a place of historical significance to Abington Township.

- **Noble Station** – This train station is one of the few remaining old train stations in the township and is recognized as having historical significance.
- **Old Abington Junior High School** – This building, constructed over two decades and completed in the 1930s, is located on Highland Avenue.
- **Tyson Green and Tyson House** – Located on Highland Road near Woodland Road, this property was owned by the Tyson Family, who helped provide mortar for the construction of Independence Hall in Philadelphia.
- **Penn State Abington Campus** – The campus, located on Woodland Road between School and Cloverly Roads, was once the Ogontz School for Young Ladies and graduated Amelia Earhart.
- **Old Abington Area** – This area, at the intersection of Old York Road and Susquehanna Road, is identified as having historical significance due to it being the first village in Abington Township.

VACANT AND UNDERUTILIZED PROPERTIES

The Vacant and Underutilized properties map has five different designations for properties, as follows:

1. Vacant Properties
2. Vehicle Storage
3. Underutilized Properties
4. Underutilized Buildings
5. Surface Parking

These designations indicate properties that may provide opportunities for development and/or redevelopment. Since the Old York Road corridor is largely developed, identifying these kinds of sites is important. When the “modules” of space are relatively small in size (a single house or lot



Underutilized properties are in close proximity to high intensity uses, yet remain relatively low in their intensity of use. Near the Noble Station are several such properties and farther up the corridor near the hospital are a number of similar parcels. These include Citizens Bank, Meals on Wheels, Republic First Bank, and S & S Tire and Auto. In total, there are over 11 acres of underutilized properties along the corridor.

Underutilized buildings include structures with available space for lease or use. Included is the Baerwood Shopping Center's former movie theater. Further north along Old York Road, at the corner of Susquehanna Road, there is a mixed-use building in which both retail and residential leaseholds are available. Continuing north on Old York Road past Edge Hill Road, the Digital Plaza currently has space for lease, and near the north end of the corridor are two properties on opposite sides of Maplewood Avenue in which buildings (one containing Arthur Murray Dance Studio and the other Lexi's Loft), currently have space for lease. These properties represent just under 3 acres of developable land.

Surface parking is a prominent use along parts of the corridor and auto dealer vehicle storage is a significant percentage of land area at the southern end of the corridor. Surface parking and vehicle storage total 77 and 16 acres respectively in total land used along the corridor. These uses may be accommodated in other ways when land values are high enough and land development prospects are strong.

PENDING AND PROPOSED DEVELOPMENT

The Pending and Proposed Development map shows prospective development locations and public improvements and are described below (Figure 2.8).

The Old York Road bridge that spans the SEPTA R3 line is deteriorated and in need of improvements. Plans are currently being devised by PennDOT to repair and modify this bridge.

in a row, for example) the opportunity is likely for infill; when the module is larger, however, the opportunity may be for significant new construction.

Along the corridor are vacant properties, which include the sites of former businesses, now shuttered, as well as sites that have not been occupied recently and remain empty (Figure 2.7). Properties along the corridor that are defined as vacant total just over 45 acres. Vacant properties include the former Eckenhoff Pontiac dealership site, containing three buildings, along with the former gas station site at the corner of where Hilltop Road and Baeder Road meet Old York Road. Down the Fairway Valley is a property that is vacant but is being used for vehicle storage by the dealerships across the street.

The most significant tract of land that is vacant along Old York Road is the Rydal Waters site. This land was in the process of being developed as a residential tract but the development company went bankrupt. The property is currently unused. Further up the corridor are several other vacant properties, including the site adjacent to the Peace a Pizza restaurant at the corner of Old York Road and Guernsey Road. There are vacant properties close to Rubicam Avenue, including the former Abington Plaza. Close to Moreland Road are a few buildings that are vacant adjacent to Maplewood Avenue.

The property formerly occupied by the Eckenhoff Pontiac dealership as well as a former gas station, at the southern end of the corridor, is currently vacant with no formal plans on record. On The Fairway, the current Baederwood Shopping Center is the site of a proposed 266-unit residential development with accompanying retail uses. There have been no official site plans submitted to the Township. Just up the hill from the Baederwood Shopping Center is the Rydal Waters development that was under construction until recently. The plans for this site were for single-family detached dwellings, but the development company, Elliot Building Group, went bankrupt, and Rydal Park, the senior living complex at the eastern end of The Fairway, now has plans to develop a low-density, low-rise complex of units across the entire site.

Redevelopment plans are underway for several small properties along Old York Road, such as a former bedding and furniture store property located next to the Houdini Lock and Safe Company. This site is being redeveloped as a bank.

The building at the northwest corner of Susquehanna and Old York Road is not fully leased and has caused problems due to its close proximity to the road right-of-way, leaving it exposed to collisions from trucks as they turn the corner. Safety improvements are needed; included might be a widening of the Old York Road sidewalk.

The former Abington Plaza site, at the intersection of Old York Road and Tremont Avenue, has now been redeveloped as a La-Z-Boy store.

Abington Memorial Hospital is continually searching for opportunities to expand their facilities, although the hospital has made an informal agreement with residents who live near the hospital not to seek to build or expand past Bockius Avenue to the east and Highland Avenue to the west. The possibility of hospital expansion is thus narrowed to include only

properties along Old York Road to the north and south of the hospital complex, and the hospital has plans to build on the parking lot next to the Levy Pavilion on the east side of the street.


VISUAL ANALYSIS

The general impression of Old York Road is that of a major thoroughfare traversing the varying topography of a “first-ring” suburb of Philadelphia (Figure 2.9). The roadway itself maintains a consistent character while the view to either side varies considerably, taking on a commercial or institutional nature with variations of the type, scale, age, and size of developments.

The southern end of the study area has a distinctive architectural component, the former Strawbridge and Clothier store. Although this property is in Jenkintown, it has a prominent visual presence when one first enters into the study area from the south. Opposite this building is more conventional suburban commercial development, with one-story buildings and surface parking in front.

Continuing northward along Old York Road, the historic bridge that spans the SEPTA R3 Regional Rail line allows for a seamless crossing of the tracks. The area around the intersection of Old York Road and The Fairway contains large parcels that include shopping centers and





auto dealerships. National chain stores range from Stein Mart, Walgreens, Old Navy, and Bed Bath and Beyond, to Whole Foods and Trader Joe's. This area has many car dealerships selling Ford, GMC, Acura, Dodge and Saturn products, among others. The Eckenhoff Pontiac dealership closed much of its site was cleared, leaving a visual "hole" at the intersection of Baeder and Hilltop Roads.

Past the shopping center and auto dealership district the topography of the corridor changes, with a steep uphill climb for a few hundred feet until the land levels in front of Larman Photo. The character of Old York Road changes considerably from what preceded. Building footprints are smaller and closer in scale to residential areas in back of the corridor. Old York Road splits to create an island, which the Township has dedicated as a War Memorial open space. Pedestrian-oriented street lighting, a feature of the corridor elsewhere along its length, ceases through this area as do street trees.

At Brook Road the character once again changes, this time to reflect the historic nature of the corridor. Stone walls appear for the first, but not last, time along Old York Road and follow along both sides of the road in front of such buildings as the Abington Free Library, Baron-Rowland Funeral Home, and Abington Presbyterian Church. At the corner of Susquehanna Road are numerous historic assets of the township, including a part of the



old Abington Junior High School, which was partially demolished and partially transformed into a Wachovia Bank and the Abington Presbyterian Church as well as the cemetery that is associated with it. Due to the age of the structures along this portion of the corridor, many buildings are close to the street curb line, even to the point of limiting the width of sidewalks to a narrow band.

At the intersection of Horace Avenue and Old York Road sizeable institutional properties begin. The Township Municipal Building and the Abington Memorial Hospital are located here, with AMH using almost 30 acres of land in just this quarter-mile stretch of the corridor. The multi-story hospital and the municipal building each have small pocket parks attached to their properties that are open for public use, with the municipal building's open space including a gazebo with benches and small plantings. Relatively speaking, the hospital's open space has more seating and more green space. The street trees along the corridor are important features and the trees in front of the hospital are set back from the sidewalk and are large, creating ample shade.

Continuing northbound along Old York Road, another shift in character occurs from the institutional uses to a commercial area. Between the intersections with Brentwood Road and Jericho Road, Old York Road maintains this appearance of suburban commerce, with a shopping center to the east and essentially strip commercial uses to the west. Target, Giant Food Stores, TJ Maxx, and other, smaller retailers make up the shopping center. Buildings are large boxes that have large expanses of surface parking located in front. Across the street from the shopping center are smaller one-story buildings that include the Abington Pharmacy as well as chain stores and gas stations.

The elevation changes again and an upward slope occurs as one approaches Edge Hill Road bridge. Once past this bridge, the corridor slopes down and once again changes its character.

Buildings and properties from the bridge until E. Moreland Road are predominantly old residential properties that have been converted over time into office or retail uses. One significant difference in the streetscape from the rest of the corridor is that overhead power lines and utility poles suddenly appear, in contrast to elsewhere where power lines are underground. This part of Old York Road has small parcel sizes and

of businesses along this portion of the corridor, there are many driveways. There are no traffic signals through most of this area and, without those controls, vehicles speed.

The condition of buildings along this part of the corridor varies mostly from fair to good, but some properties are in poor condition. With the small lots and buildings, overhead wires, and variable property conditions, this portion is the least attractive of the corridor.



All along the corridor are mountable medians with periodic breaks at certain intersections. Some parts of the median are in poor condition, but most are intact. Some parts of the median also have landscaping, with the most prominent examples being in front of the hospital and Abington Presbyterian Church.

PEDESTRIAN/BICYCLE FACILITIES

The Pedestrian Facilities map highlights conditions for pedestrian mobility along Old York Road (Figure 2.10). This corridor currently does not have any bicycle facilities, such as bike lanes within the road right-of-way and designated bicycle routes.

SIDEWALKS

Old York Road has virtually continuous sidewalks through the corridor on both sides of the roadway. Although sidewalks are present along the corridor, quality tends to vary from one portion of the corridor to another. Overall the quality of sidewalks is high. There are places in which quality drops due to either broken or cracked concrete or narrow sidewalks. The average width of sidewalks is between four and five feet. There are portions in which the sidewalk can narrow down to as little as two feet wide, such as near the intersection of Susquehanna Road and Old York Road, on the west side of Old York Road. Sidewalks

the highest number of vacant or underutilized properties. Interspersed within the old residential properties are more auto-oriented businesses such as McDonalds, Dunkin Donuts, and a 7-11. Due to the small parcel sizes and high number

underneath the Edge Hill Road bridge are also narrow, with a width of four feet on either side of the street.



study area, Old York Road becomes Broad Street and extends to Center City Philadelphia. Major roads to the west of the study area include Route 309 and I-476 (the Northeast Extension of the Pennsylvania Turnpike). To the east, US Route 1 and Interstate 95 run north and south. US Route 1 provides access for regional traffic, while I-95 provides access along the entire east coast of the United States. Consequently, there is a large volume of traffic traveling regionally on Old York Road.

From a local standpoint, the area is a highly developed commercial spine. This commercial development also attracts traffic to the area. Apart from the volumes, vehicular mobility is also constrained by the numerous traffic signals, with 15 over the 2.5-mile length of the corridor.

SIGNALIZED INTERSECTIONS

There are fifteen intersections on the 2.5-mile-long corridor that have traffic signals and accompanying pedestrian-activated signals. All of the intersections provide curb ramps that are in good shape as well as painted pedestrian crosswalks. The only signalized intersection on the corridor that lacks full pedestrian-activated equipment is at East Moreland Road. The northeast corner of that intersection does not have a phase for pedestrians.

TRAFFIC AND ROADWAY CONDITIONS

Old York Road is classified as an Urban Principal Arterial. Roadway character and features along it remain fairly consistent, with a five-lane section (two lanes in each direction with a separate left-turn lane). Urban Principal Arterials are designed to interconnect local and collector roads at somewhat higher speeds with some control of the access to the street.

The study limits are from Rydal Road to Moreland Road (Figure 2.11). Old York Road connects with the Pennsylvania Turnpike, just north of the study area. To the south of the

In the following sections, traffic volumes along Old York Road, its side streets, and the streets running parallel to it, are discussed. Existing conditions along the corridor are also presented in terms of geometry and traffic control.

VEHICULAR TRAFFIC VOLUMES

Data obtained from the DVRPC report determined that in 2005, Route 611 (Old York Road) had an average daily two-way traffic volume of 33,600 vehicles through Abington Township. The southern end of the corridor, by Cheltenham Township has the lowest volumes ranging from 20,000 to 23,500 average annual daily traffic (AADT) volumes. The Pennsylvania Turnpike generates a large amount of traffic in the northern end of Route 611 in Upper Moreland Township with around an AADT of around 36,000 vpd.

Parallel Roads in the area also carry large volumes, but none quite as big as Route 611. Easton Road to the West of Old York Road has an AADT of 16,500 vpd. The highest volume along that road is in the section parallel to the middle section of Old York Road. This indicates that traffic traveling on Old York Road might

use a side street to access Easton Road and bypass the most congested area on Old York Road. Similarly, volumes on Huntington Pike (S.R. 0232) are highest in the middle section of Old York Road, supporting the theory that traffic traveling on Old York Road might bypass the most congested section of Old York Road in favor of using parallel streets such as Huntington Pike.



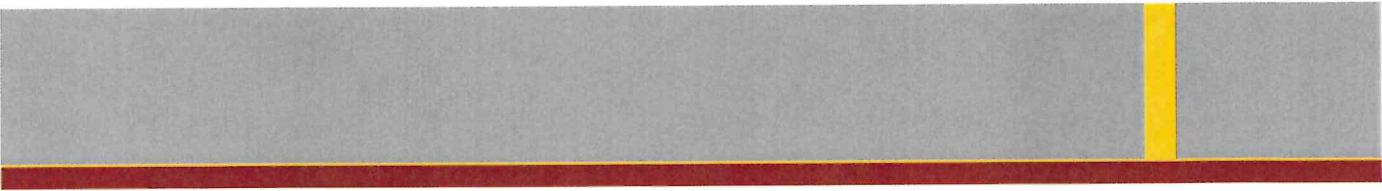
In comparing the three parallel roads, Old York Road, Easton Road and Huntington Pike, Old York Road carries the most volume (around 33,600 vpd), Huntington Pike is in the middle with about 23,000 vpd and Easton Road carries the least at around 16,500 vpd. Another parallel Road is Valley Road, which runs west of Old York Road and intersects several streets that intersect Old York Road. Valley Road has 13,700 vpd. Easton Road and Old York Road meet, north of the study area and provide a connection with the PA Turnpike. Huntington Pike parallels to Old York Road to the east.

While there are many cross-streets along this corridor, the five most heavily traveled are Moreland Road (10,800 vpd), Old Welsh Road (13,200 vpd), Highland Avenue (11,000 vpd), Susquehanna Road (14,600 to 17,800 vpd) and The Fairway (11,300 vpd). From a regional perspective, these cross-streets provide access to a number of destinations.

East of Old York Road, Old Welsh Road transitions into Welsh Road and provides a connection to US Route 1 and I-95. West of Old York Road, Old Welsh Road intersects Easton Road. According to recent traffic counts obtained from DVRPC, a significant amount of traffic utilizes this route by turning left from the northbound approach of Old York Road and conversely, turning right from Old Welsh Road onto Old York Road. Moreland Road (north of Old Welsh Road) and Edge Hill Road (south of Old Welsh Road) connect with Old Welsh Road east of Old York Road, providing an alternate route for traffic originating north and south of the study area to access US Route 1 and I-95, thereby bypassing the center of the study area, which according to the data from PennDOT's ITMS website, tends to be the most congested. The traffic counts obtained from DVRPC for this intersection also indicate that a significant amount of traffic is utilizing Moreland Road west of Old York Road. Again, traffic turns left from Old York Road onto Moreland Road and right from Moreland Road onto southbound Old York Road. The Fairway provides an additional connection for traffic originating south of the study area to access US Route 1 and I-95 by means of Valley Road and Huntington Pike to Welsh Road.

West of Old York Road, Moreland Road becomes Welsh Road, which provides a connection to Route 309 south of Montgomeryville. Susquehanna Road provides a connection to the PA Turnpike and thus is an important connection to Old York Road. Highland Avenue has likely become a popular alternate route to Susquehanna Road, as it runs parallel to Old York Road and provides motorists a means to avoid the intersection of Susquehanna Road and Old York Road.

While Old York Road is the focus of this study, it is clear that other roads in the area help in creating a network of roads to facilitate movement of vehicles through the area. The volume of traffic traveling in this network, combined with the high percentage of turning



vehicles onto the cross-streets, result in significant levels of congestion during peak periods.

Peak period traffic counts obtained from DVRPC show relatively balanced directional traffic flow. During the morning peak southbound volumes are slightly heavier along Old York Road while in the evening peak the northbound volumes are slightly heavier. The patterns are typical commuting patterns favoring travel towards the City.

Significant contributors to off-peak vehicular congestion include traffic traveling to destinations such as the Willow Grove Mall, The Fairway/Baederwood Shopping Center and Abington Shopping Center/Abington Towne Center. However, the entire Old York Road corridor has a number of retail locations, restaurants and other local businesses. Also, the Abington Free Library, YMCA, Abington Memorial Hospital and the Township Municipal Building are located along the corridor. Consequently, there are a number of driveways lining the road, creating many conflicts as traffic enters and leaves the parking lots of these establishments.

ROADWAY GEOMETRY AND TRAFFIC CONTROL

Old York Road is primarily a five-lane Suburban Arterial with two travel lanes in each direction and a center left-turn lane within a fifty-five-foot paved cartway. Old York Road from Rydal Road to Baeder Road has a speed limit of thirty-five miles per hour. North of Baeder Road, the speed limit is forty miles per hour. No shoulders or on-street parking are provided in the study area, though all sections of the road are curbed. Sidewalks are located on both sides of the street immediately adjacent to the roadway. From Rydal Road to Horace Avenue there is a mountable median. North of Horace Avenue the median varies from a mountable to a landscaped median.

There are 15 signalized intersections and a number of unsignalized intersections in the corridor (Figure 2.12). At each signalized intersection, there is at least a separate left-turn lane and two through lanes (with a shared right-turn lane) on Old York Road and the side street has a shared left-through-right lane and one receiving lane. In some sections, the pavement is widened to provide a separate, northbound right-turn lane. These intersections include The Fairway, Highland Avenue (including the entrance to Giant), London Road and Wheatsheaf Road (including the entrance to Target).

Similarly, some side streets have different lane configurations to accommodate heavier travel patterns. Cloverly Road has a separate right and left-turn lane. The eastbound approach of Baeder Road has a separate left-turn lane, separate through lane, and a right-turn that acts as a channelized right. The westbound approach of The Fairway has separate dual left-turn lanes and a separate shared through-right turn lane. Susquehanna Road has separate left-turn lanes on both approaches. Horrace Avenue has a separate left-turn lane on the eastbound approach. Woodland Road is one-way into the hospital entrance located on the west side of the road. Keith Road and Highland Avenue have separate left-turn lanes on the eastbound approach. London Road has a separate right-turn lane westbound. Old Welsh Road has a separate eastbound left-turn, through and right-turn lane. Moreland Road has a separate eastbound right-turn lane (see Figure 2.12 for diagrams of these intersections).

While there are no significant vertical curve issues in the area, there are several horizontal curves in the area that result in sight distance issues. Some examples include the horizontal curve on Old York Road north of the intersection with The Fairway and north of Canterbury Road. There is an overpass located at the Septa R-3 line and an underpass at Edge Hill Road. The underpass results in sight distance issues.

Several roads intersect Old York Road at acute angles, such as Rydal Road and Cloverly Avenue, Rodman and the Noble Station entrance, Keith Road, Wheatsheaf Road and Old Welsh Road. This type of intersection results a number of problems, such as site distance, atypical alignment, and horizontal problems with regard to turning radii.

As previously stated, site distance is a challenge in the area. Several buildings are located in close proximity to the edge of the road. This proximity creates sight distance problems and also interferes with the turning radius of vehicles, especially trucks. In some instances, trucks have been known to physically hit the sides of a building in making a turn.


The study area is a highly developed commercial corridor with numerous access points provided to parking areas supporting businesses alongside Old York Road. Sometimes these access points lack clear definition and the entire store frontage acts as a driveway instead of having a driveway

designated by curb cuts. Individual residences, however, typically do not have driveway access to Old York Road, but rather have rear or side street access to their properties.

TRANSIT FACILITIES

Public transportation comprises an important component of the mobility system within the study area (Figure 2.13). For many residents, incoming commuters, and visitors who do not have cars, it represents the only possible way to travel within and beyond the corridor. For others who have a car, the convenience and economy of public transportation encourages its use. While transit is no longer the dominant mode of transportation, it still can influence and shape development patterns. Moreover, the transit network and its proximity to major regional hubs can influence land use decisions and assure the economic vitality of the area. This section presents a description of the Southeastern





Pennsylvania Transportation Authority (SEPTA) transit system in terms of the service available to residents, employees, and others. The Old York Road corridor is served by two forms of SEPTA transit, including two Regional Rail lines, the R3 West Trenton and the R2 Warminster, and two bus routes, #22 and #55.

SERVICE DESCRIPTIONS

The R3 West Trenton line runs from Center City Philadelphia to West Trenton in New Jersey. There is one station in direct proximity to Old York Road, Noble Station, near Baeder Road. Farther down the line is Rydal Station, located at Susquehanna Road and Washington Lane. Both stations on the R3 West Trenton line provide off-street parking for commuters.

The R2 Warminster line runs from Center City Philadelphia to Warminster, northeast of Philadelphia. There are two stations along the R2 line in proximity to the corridor. Roslyn Station is located at Easton and Susquehanna Roads, and Crestmont Station is at Rubicam Avenue and Rockwell Road.

The Route 55 bus traverses the corridor while the Route 22 bus runs in close proximity to it. The Route 55 bus runs from the Olney Station in Philadelphia, where it connects to the Broad Street Subway, to Willow Grove. This route runs along the entire length of Old York Road in Abington Township, making over 30 stops along the way.

The Route 22 bus does not run on any portion of Old York Road but follows the nearby Easton Road. This route connects riders with Warminster in Bucks County to the north and the Olney Station to the south.

RIDERSHIP

The R3 West Trenton Regional Rail line's Noble Station has a daily ridership of about 210 to 220 persons. The inbound train, traveling toward Center City, boards 190 passengers while 31 depart the train. The outbound train, traveling toward West Trenton, boards 21 while 195 depart. There are 61 parking spaces available for use at this station, while typically 54 of them being utilized. Rydal Station is utilized by 85 passengers a day and has a parking capacity of 43 with a utilization level of 27.

The R2 Warminster line's Roslyn Station boards 204 passengers on a typical weekday and departs 146. The parking capacity is 87 with a utilization level of 80. The Crestmont Station boards 61 passengers, departs 57, and has a parking capacity of 24 with 24 being utilized.

The Route 55 bus is a very heavily utilized route. Throughout a typical weekday, this route serves 2,600 passengers both northbound and southbound. There are certain stops on Old York Road in Abington Township that have a higher-than-average number of people boarding and alighting than others. Intersections such as at The Fairway, Horace Road, Woodland Avenue, and Susquehanna Road support high numbers of riders due to their proximity to institutions, retail shopping centers and other destinations. The stops that serve the Abington Memorial Hospital near Woodland Road have 154 passengers either board or exit the bus going both northbound and southbound. The next stop on the line, at the corner of Horace Avenue and Old York Road, has 84 people board or alight from the bus on a typical day, making it the second busiest stop along the corridor. The two other frequently-used stops along the corridor were at Susquehanna Road with approximately 67 passengers and The Fairway with 75 total passengers.

Route	Weekday			Weekend	
	Peak	Midday	Evening	Saturday	Sunday
Regional Rail					
R3	30	60	28	60	60
R2	35	60	32	60	60
Bus					
55	10	20	10	20	30
22	15	20	16	30	70

Table 2.1 Transit Service – Headways (minutes)

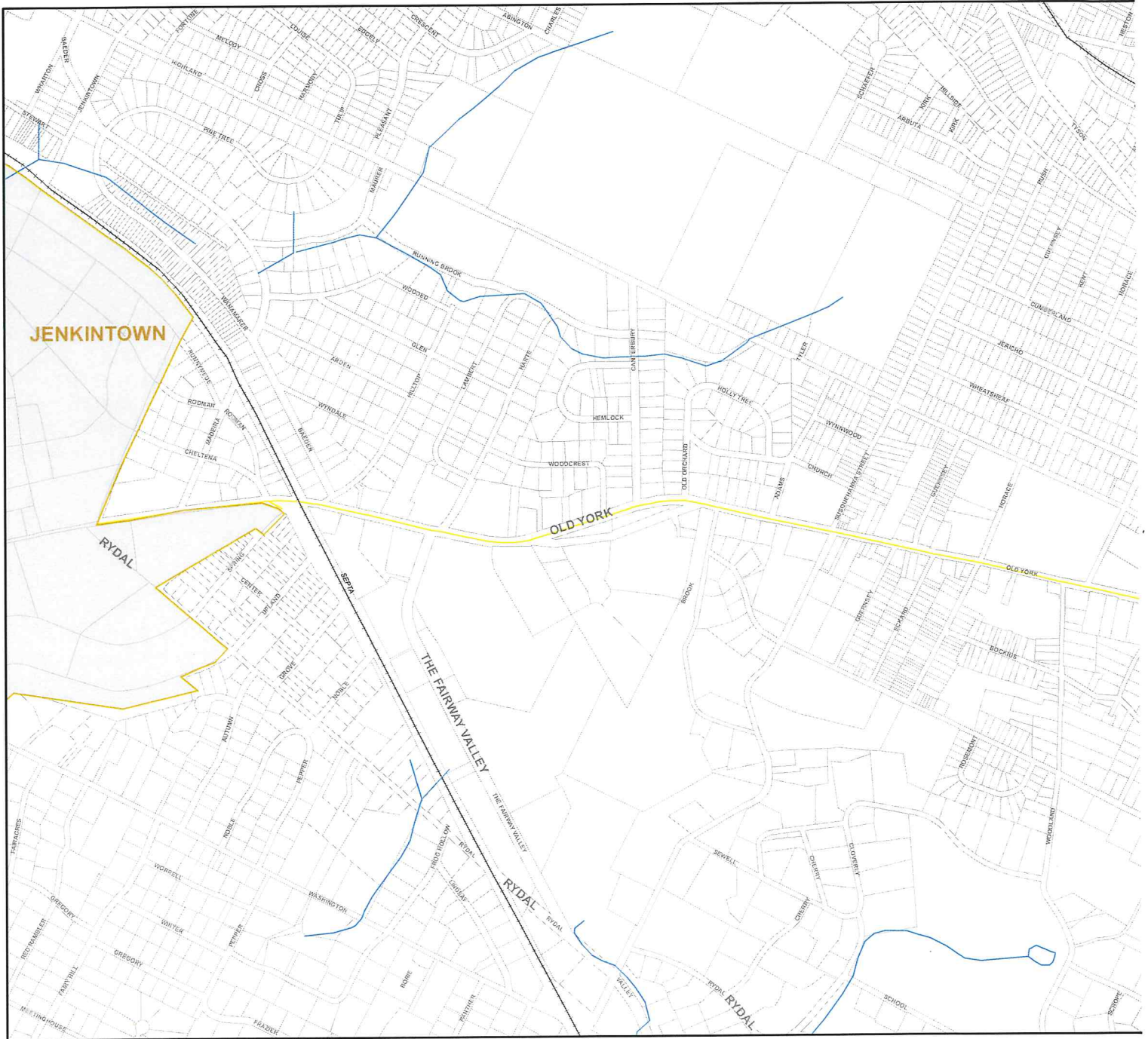
Route	Weekday		Saturday		Sunday	
	Start	End	Start	End	Start	End
Regional Rail						
R3 to Center City	5:46am	11:35pm	6:25am	11:25pm	6:26am	11:25pm
R3 to West Trenton	5:55am	12:11am	7:04am	12:34am	7:04am	12:34am
R2 to Center City	5:51am	11:24pm	5:51am	9:51pm	5:51am	9:51pm
R2 to Warminster	5:39am	12:39am	6:11am	11:08pm	6:11am	11:08pm
Bus						
55 Northbound	24 Hours	24 Hours	24 Hours	24 Hours	24 Hours	24 Hours
55 Southbound	24 Hours	24 Hours	24 hours	24 Hours	24 Hours	24 Hours
22 Northbound	5:06am	12:57am	5:08am	12:50am	5:05am	12:49am
22 Southbound	4:48am	1:12am	5:01am	1:05am	5:06am	1:00am

Table 2.2 Transit Service – Span of Service

FREQUENCY OF SERVICE

A major determinant as to whether people ride public transportation is the frequency of service. How often the transit vehicles operate influences waiting and transferring times. In the study area, headways or the interval between vehicles, is a function of both demand levels and policy considerations to limit waiting times.

Frequency of service was measured in terms of headways or the interval between transit vehicles in minutes (Table 2.1) and the span of service as determined by the start and stop times according to the routes schedule (Table 2.2). The Regional Rail lines run approximately from 5:30 in the morning, with 12:30 a.m. being the latest time of departure. During peak hours (7-9 a.m.; 3:30-6 p.m.), the rail lines run about every 30 minutes and during the off-peak hours every 60 minutes. The Route 55 bus offers service 24 hours a day with peak headways every 10 minutes and off-peak every 25 minutes. The Route 22 bus offers service from 4:45 a.m. until approximately 1:15 a.m. with headways during peak hours every 15 minutes and during off-peak hours every 30 minutes hours every 30 minutes.



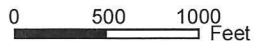
Old York Road Corridor Improvement Study Abington Township

BASE MAP

- Old York Road
- Railroad
- Streams
- Municipal Boundary



Figure 2.1





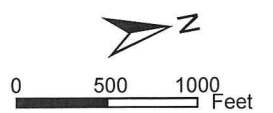
Old York Road Corridor Improvement Study Abington Township

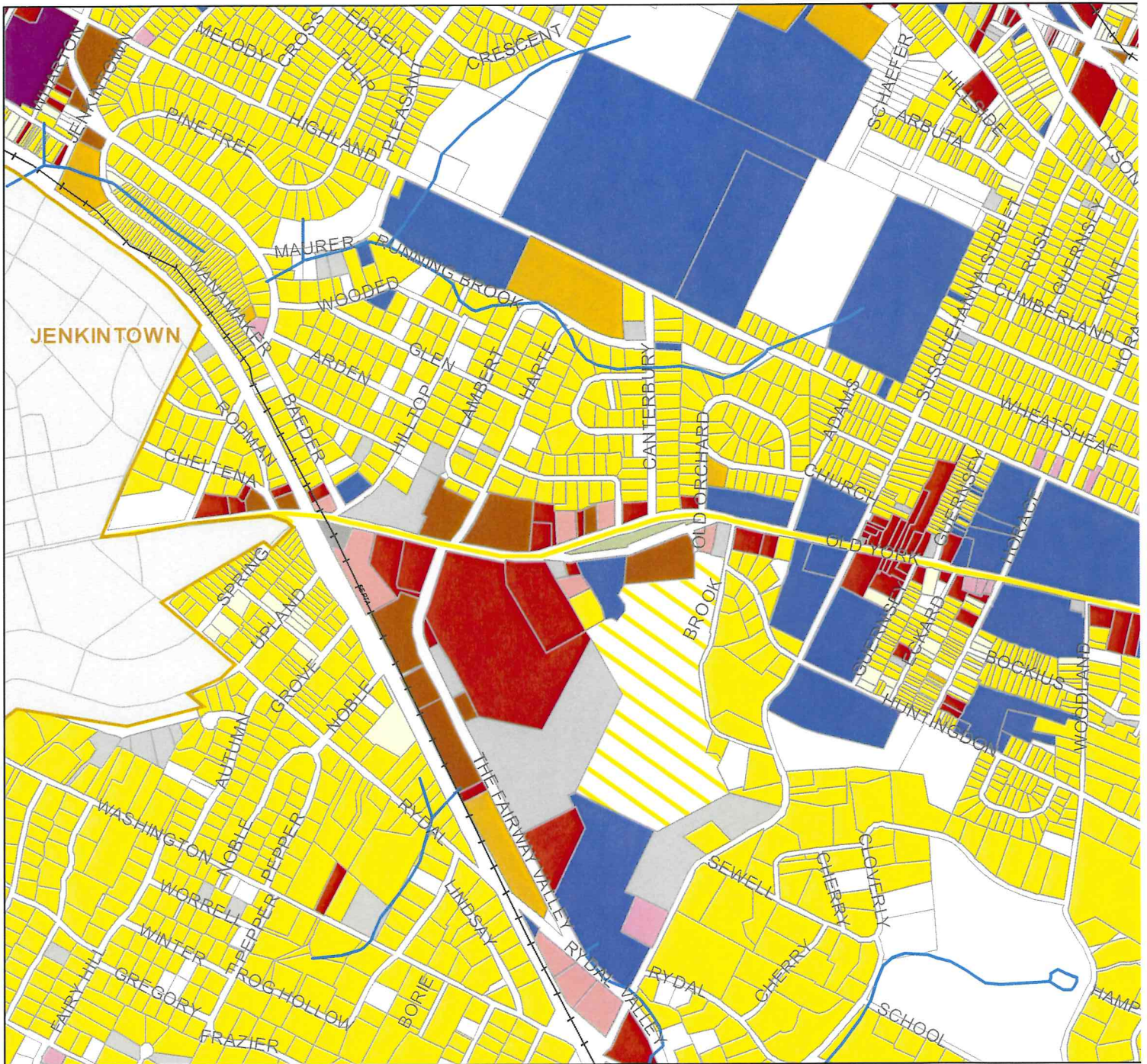
AERIAL

- Old York Road
- ▭ Municipal Boundary



Figure 2.2





Old York Road Corridor Improvement Study Abington Township

EXISTING LAND USE

- | | |
|---|-----------------------------------|
| Old York Road | Office |
| Railroad | Auto Sales, Service and/or Retail |
| Streams | Mixed Use |
| Municipal Boundary | Institutional |
| Parcel Boundary | Industrial |
| Residential - Single Family Attached | Open Space, Recreation |
| Residential - Single Family Detached | Transportation |
| Single Family Detached - Under Construction | Vacant |
| Residential - Multi-Family | Utilities |
| Commercial | |

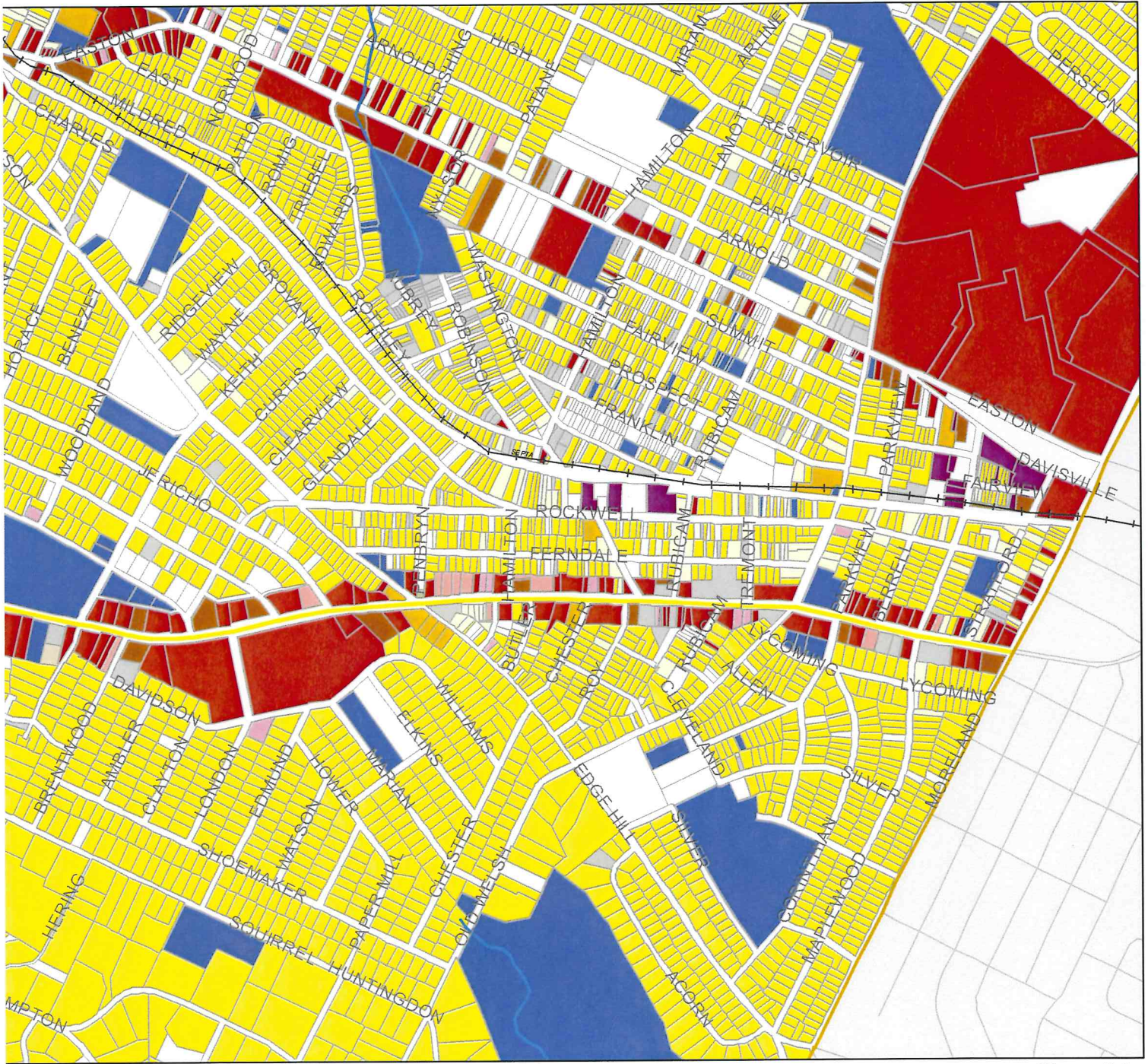
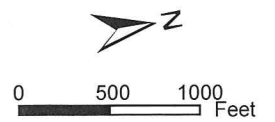
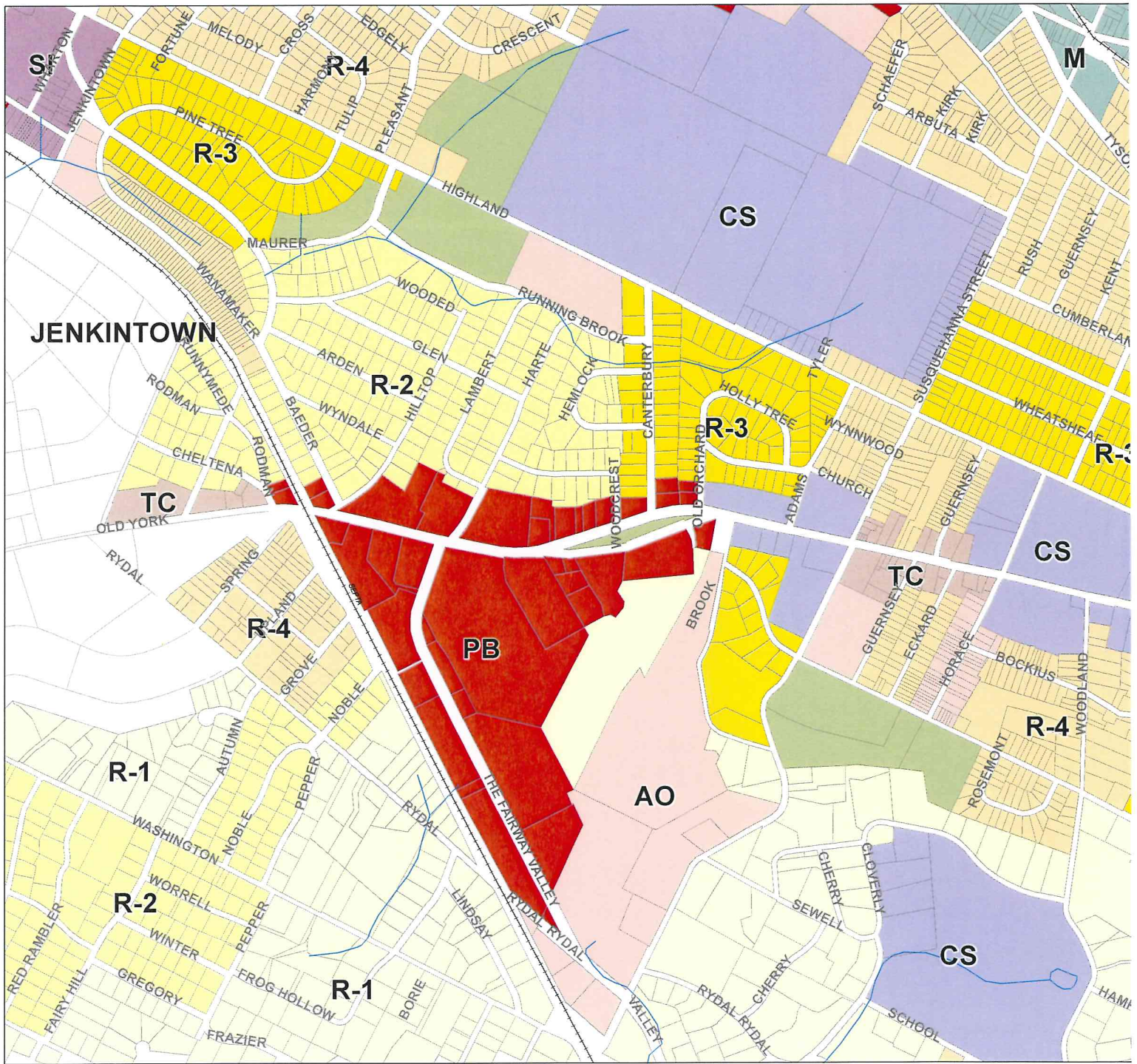


Figure 2.3





Old York Road Corridor Improvement Study Abington Township **ZONING**

 R-1 Lo Density Residential	 R-1 Lo Density Residential	 R-1 Lo Density Residential
 R-2 Low-Medium Density Residential	 R-2 Low-Medium Density Residential	 R-2 Low-Medium Density Residential
 R-3 Medium Density Residential	 R-3 Medium Density Residential	 R-3 Medium Density Residential
 R-4 High Density Residential	 R-4 High Density Residential	 R-4 High Density Residential

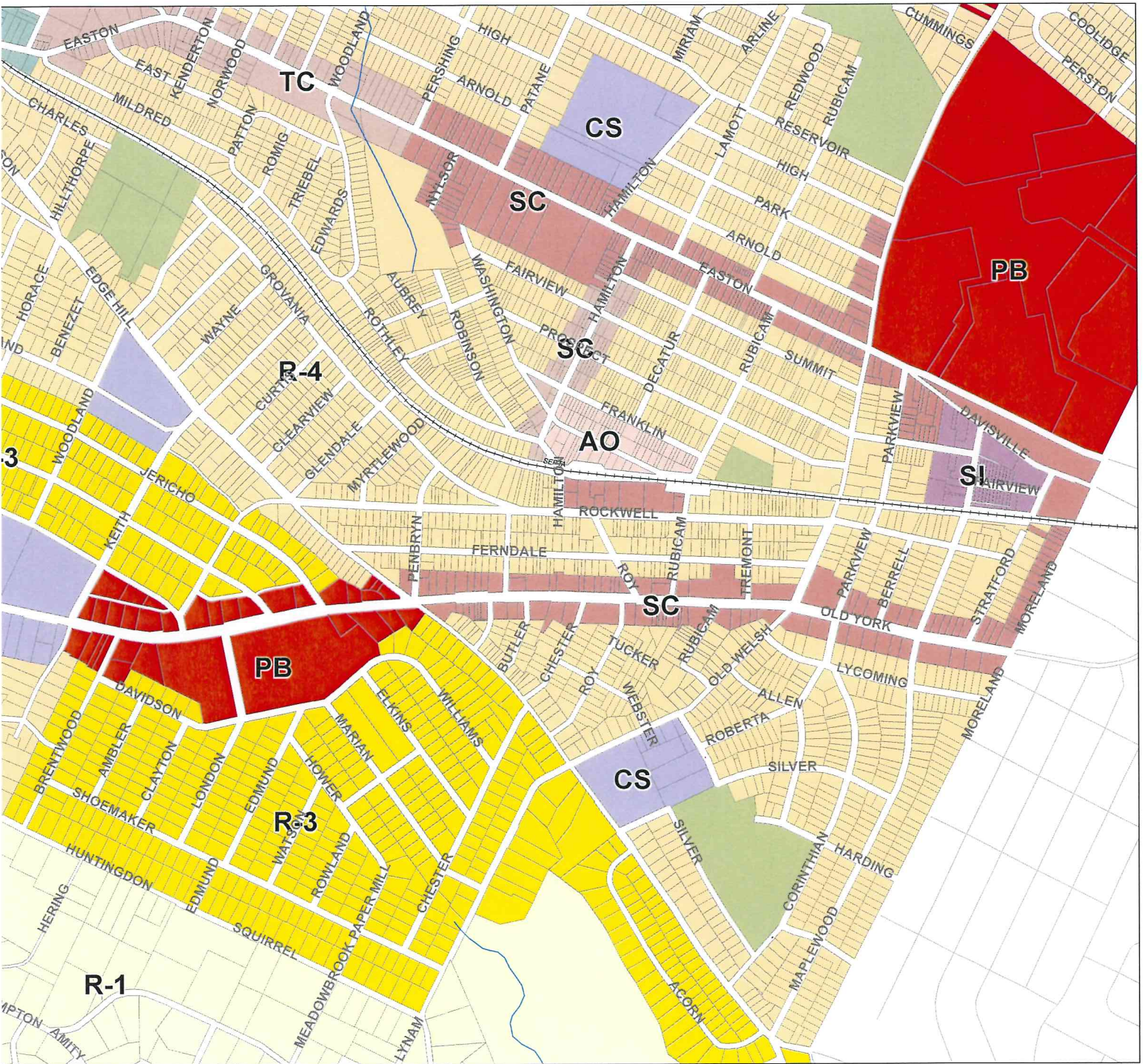
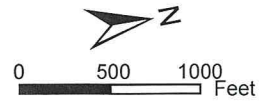
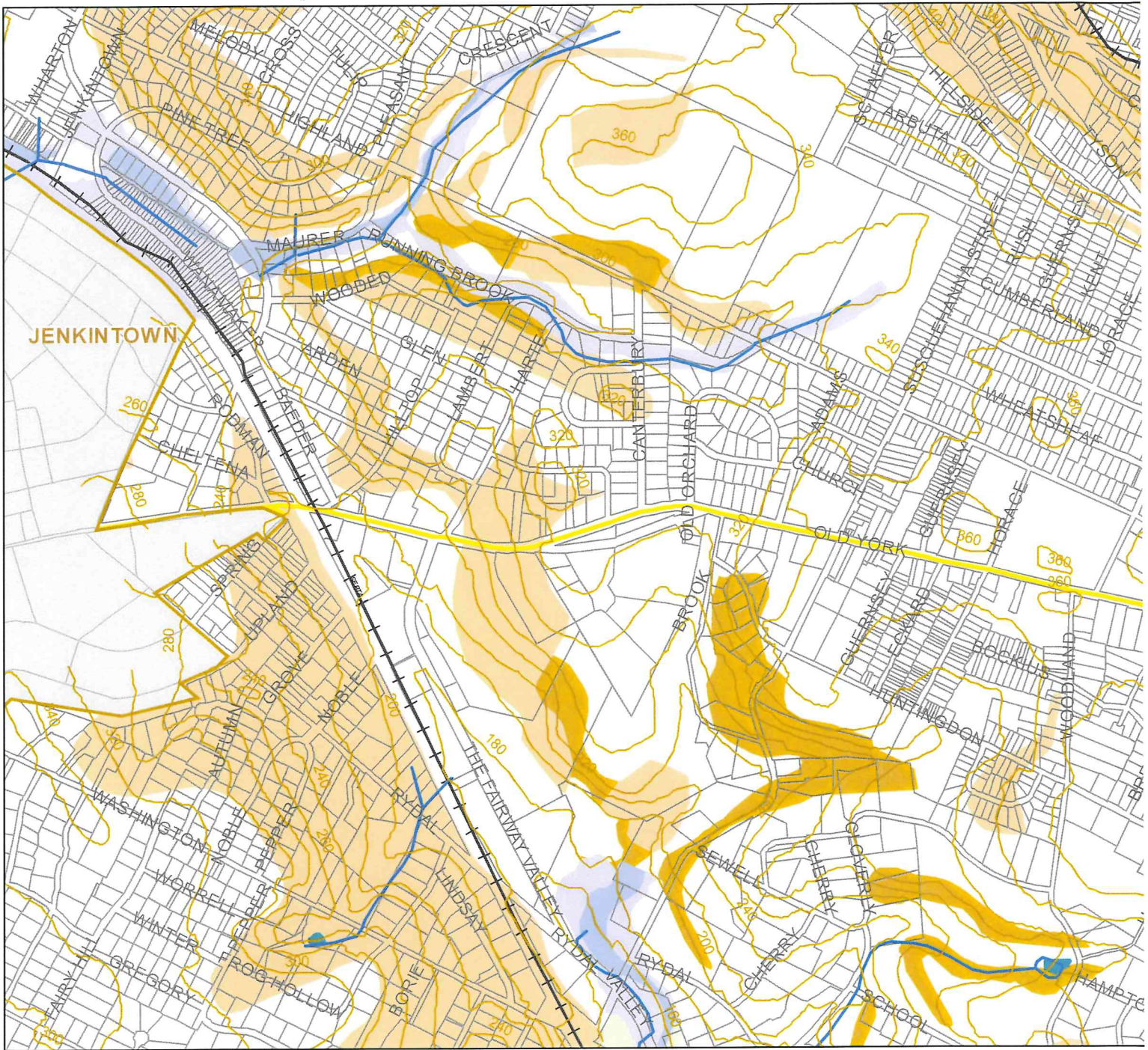













Figure 2.4





Old York Road Corridor Improvement Study Abington Township

NATURAL FEATURES

- | | |
|--|---|
|  Old York Road |  Hydric Soils |
|  Railroad |  Floodplain (100-YR) |
|  Streams |  Floodway |
|  Municipal Boundary |  NWI Wetland |
|  Contours (20 ft.) | |
|  Moderate Slope (15 - 25%) | |
|  Severe Slope (>25%) | |

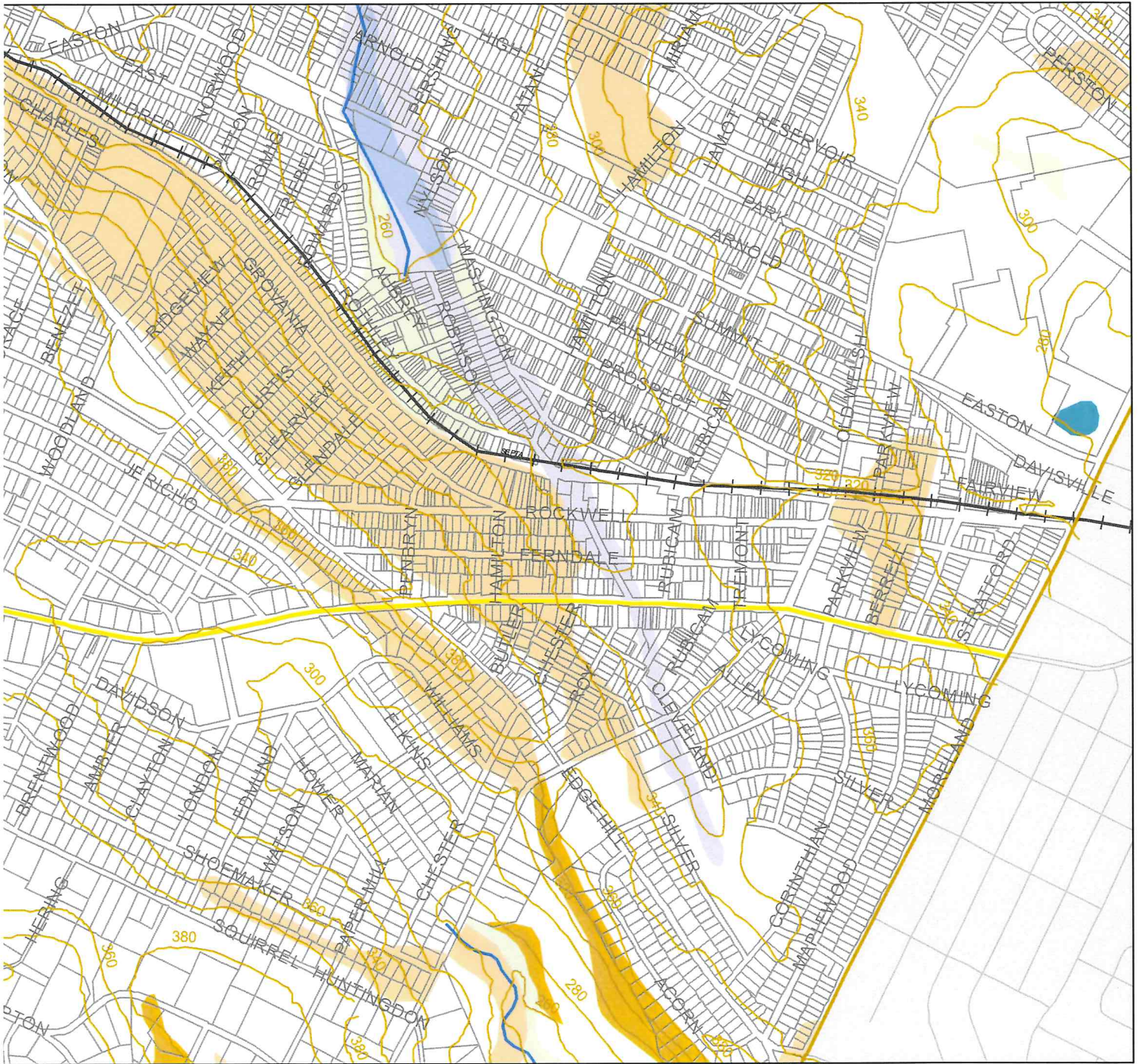
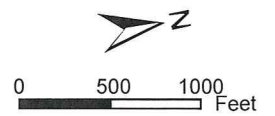
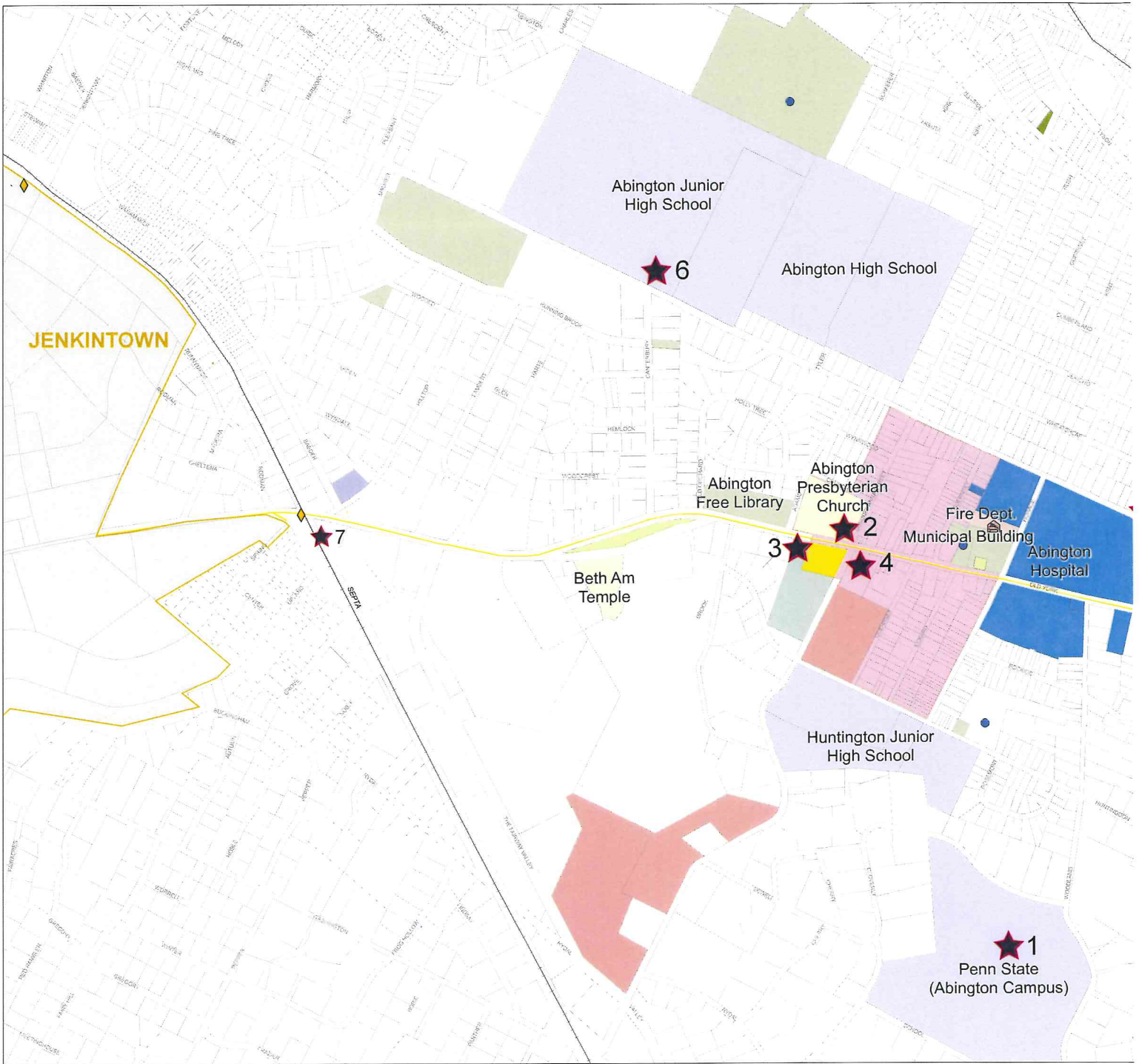


Figure 2.5



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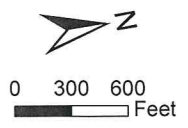
Old York Road Corridor Improvement Study Abington Township

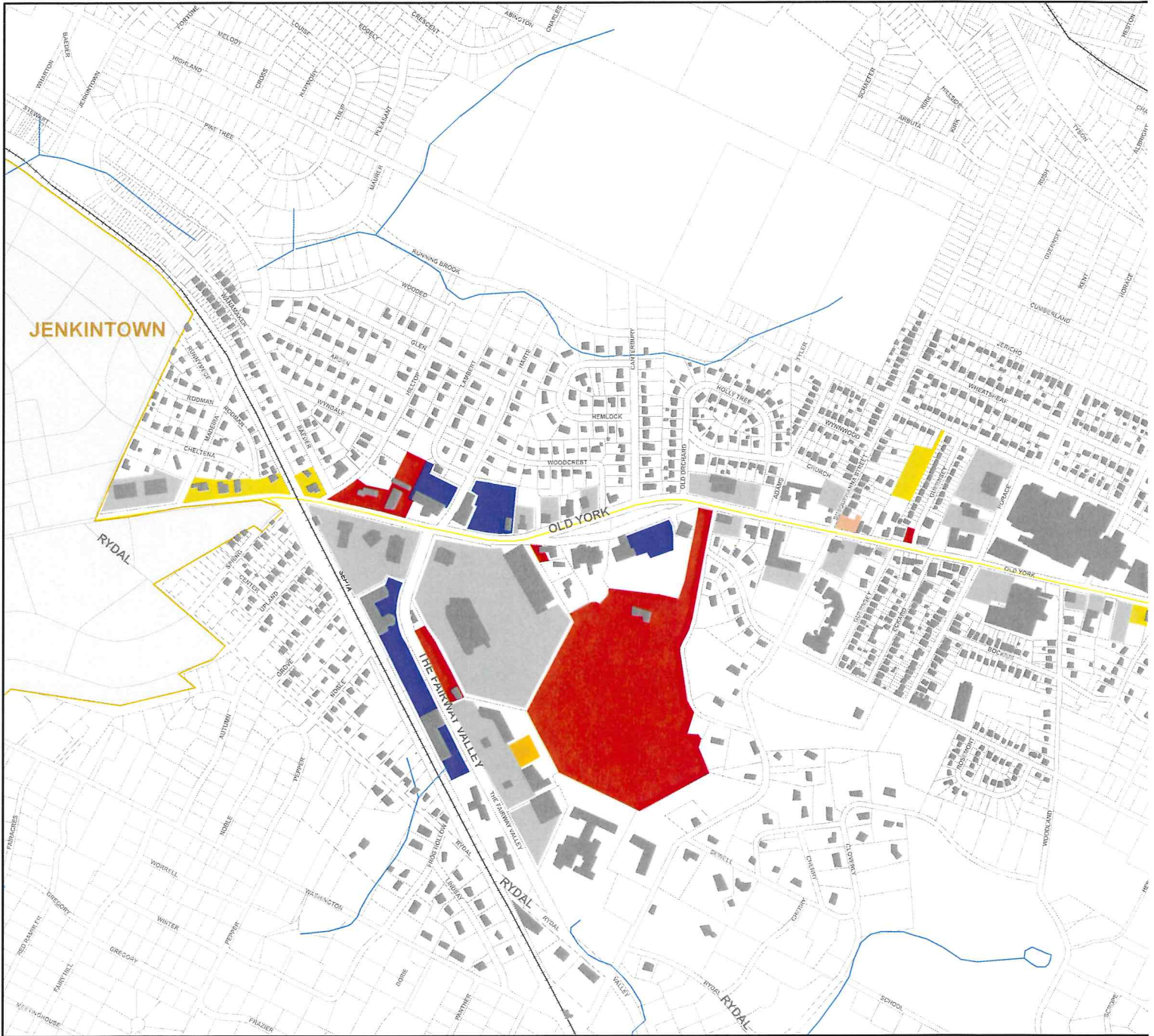
COMMUNITY AND HISTORIC FACILITIES

- | | | | | |
|--------------------|------------------------|----------------------------|--|-----------------------------------|
| Old York Road | Parcel | YMCA | Historic Resource | 5 Tyson Green and Tyson House |
| Railroad | Firehouse | Country Club | Old Abington Area | 6 Old Abington Junior High School |
| Streams | Church/Synagogue | Public Open Space | 1 Penn State Abington Campus | 7 Noble Station |
| Municipal Boundary | Cemetery | State Government Property | 2 Abington Presbyterian Church & Graveyard | |
| Firehouse | Abington Hospital | Montgomery County Property | 3 Abington YMCA | |
| Municipal Building | Adult Care or Living | Municipal Property | 4 Old Abington Township High School | |
| Historic Bridge | Schools | Post Office | | |
| Historic Resources | Private Nursery School | | | |



Figure 2.6





Old York Road Corridor Improvement Study Abington Township

VACANT AND UNDERUTILIZED PROPERTIES











-  Old York Road
-  Railroad
-  Streams
-  Municipal Boundary
-  Building Footprint
-  Vacant Properties
-  Vehicle Storage
-  Underutilized Properties
-  Underutilized Buildings
-  Surface Parking



Figure 2.7

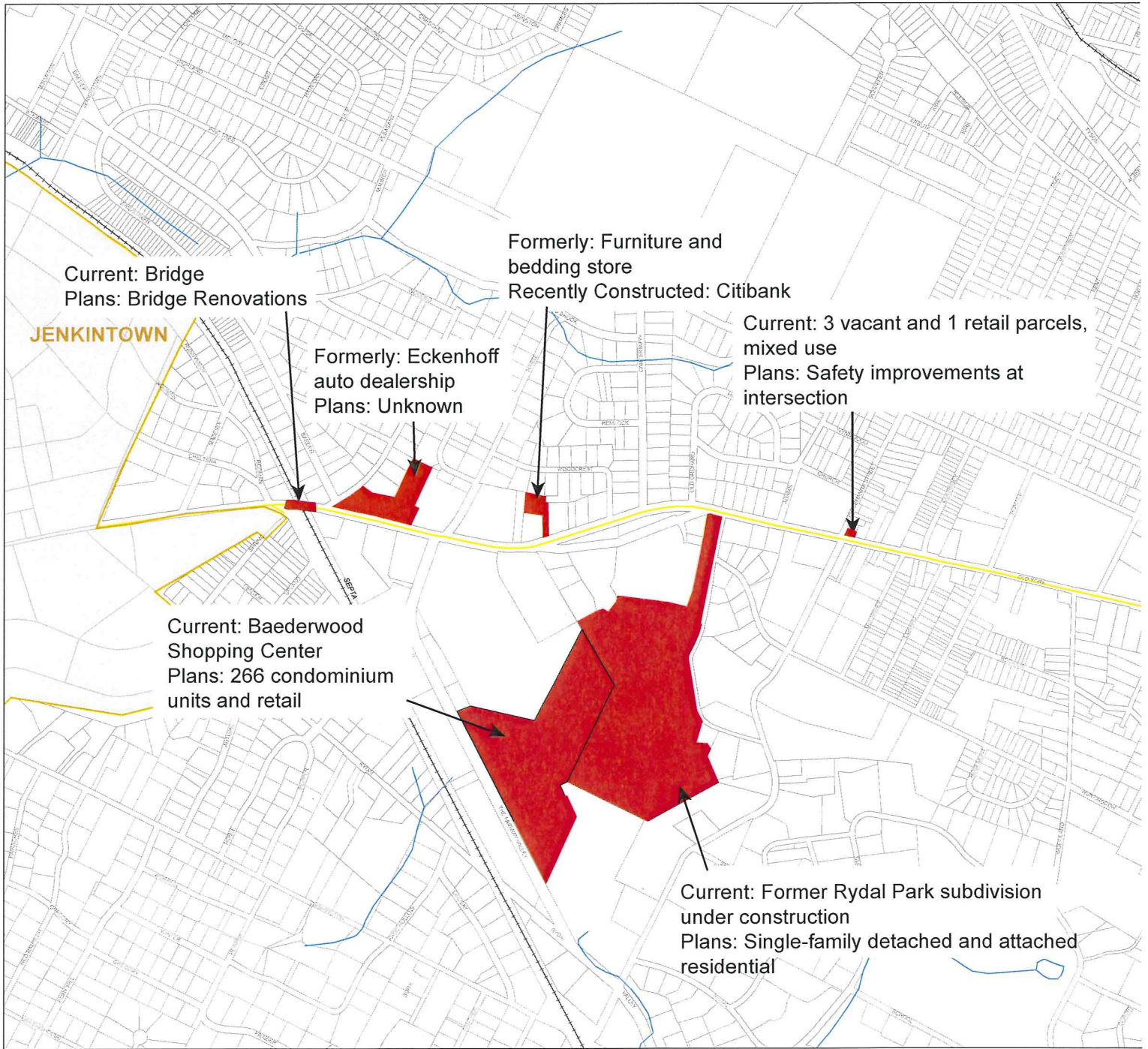


0 500 1000 Feet








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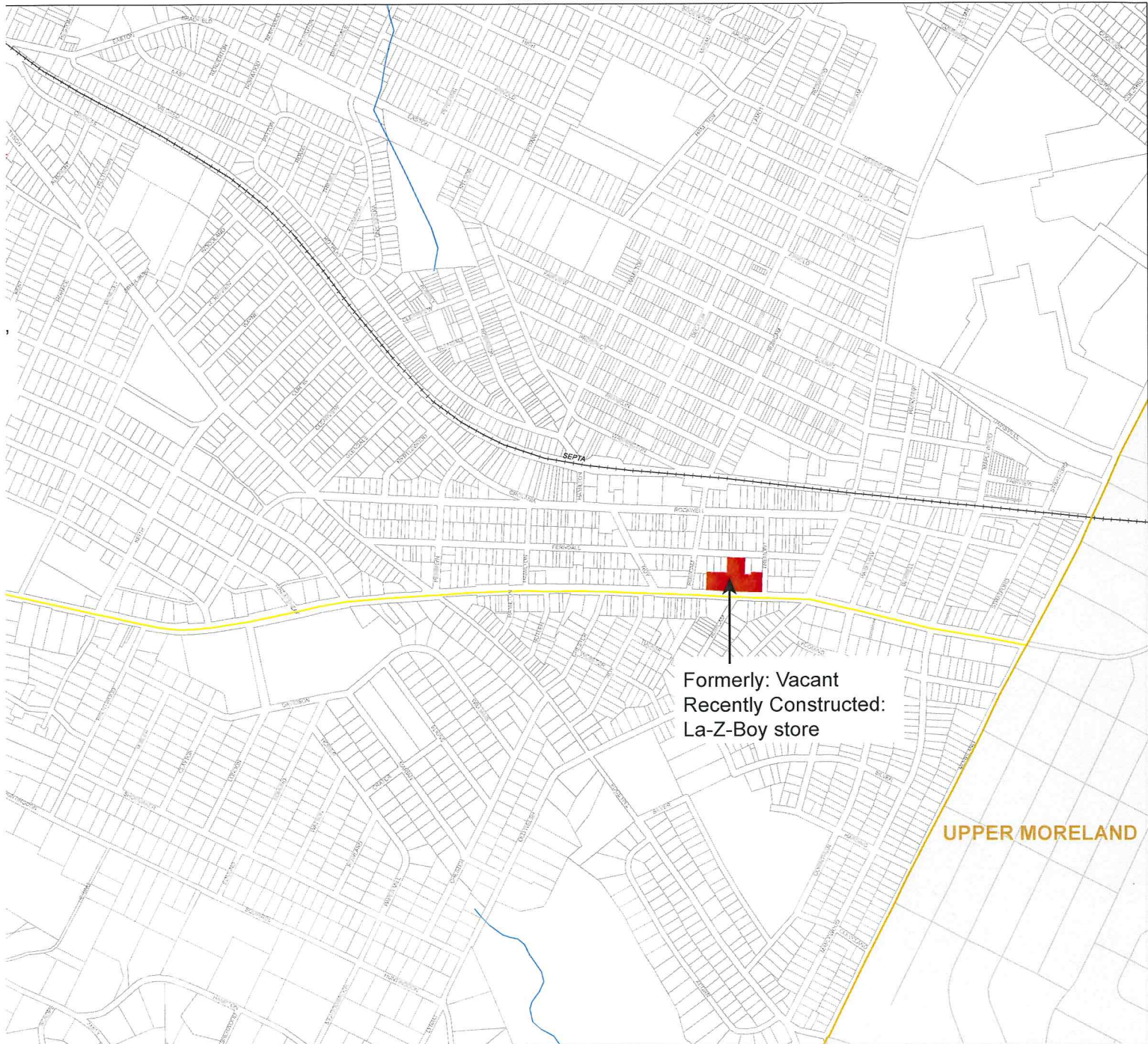
November, 2007



Old York Road Corridor Improvement Study Abington Township

PENDING AND PROPOSED DEVELOPMENT

-  Old York Road
-  Pending and Proposed Developments
-  Railroad
-  Streams
-  Municipal Boundary

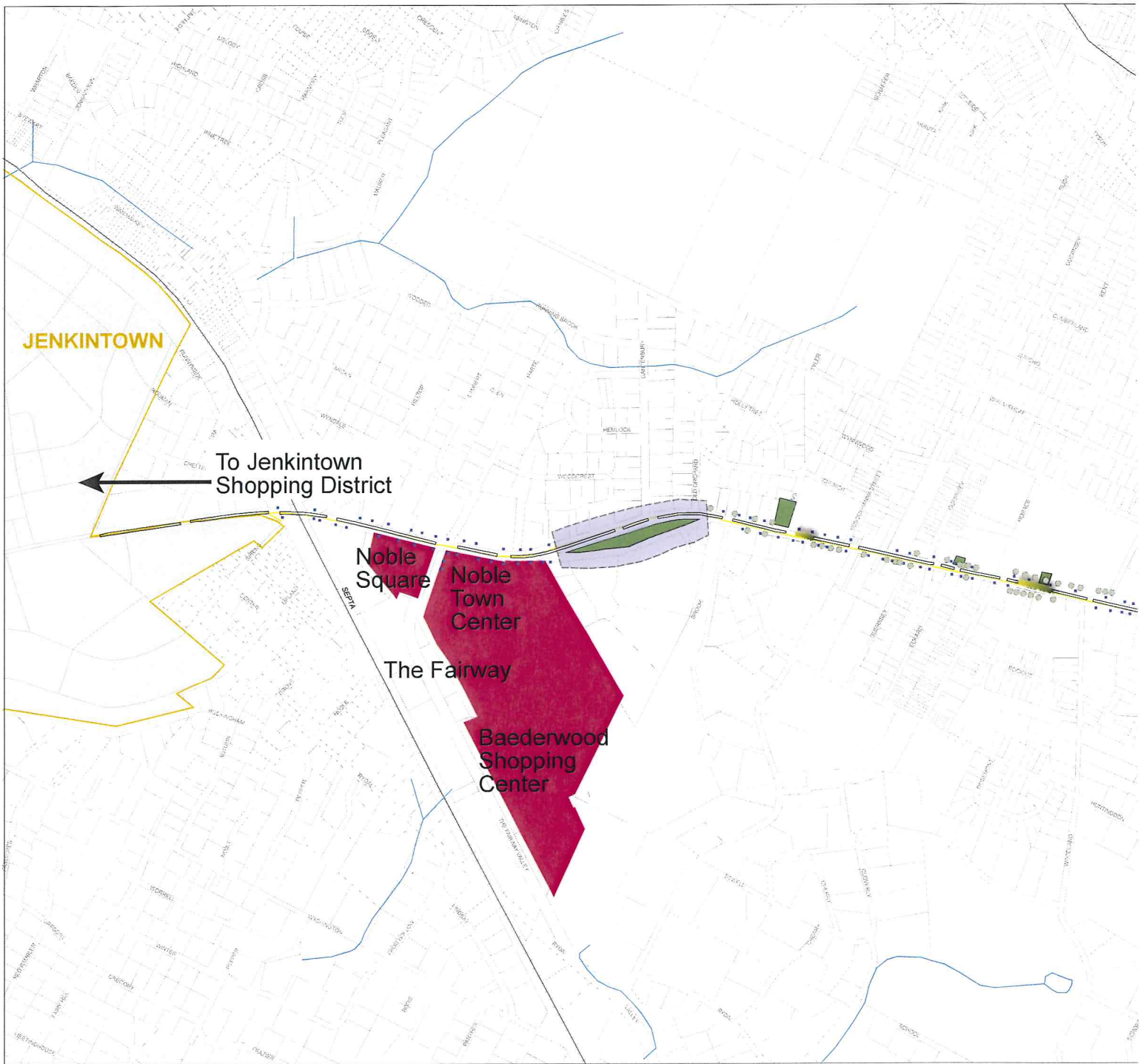


Formerly: Vacant
 Recently Constructed:
 La-Z-Boy store

UPPER MORELAND

Figure 2.8





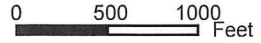
Old York Road Corridor Improvement Study Abington Township

VISUAL ANALYSIS

- | | | |
|--------------------|----------------------------|---|
| Old York Road | Overhead Utility Lines | Open Space |
| Railroad | Street Trees | Discontinuation of Pedestrian-scaled Lights |
| Streams | Pedestrian Lights | Shopping Districts |
| Municipal Boundary | Median with Mountable Curb | Landscaping |

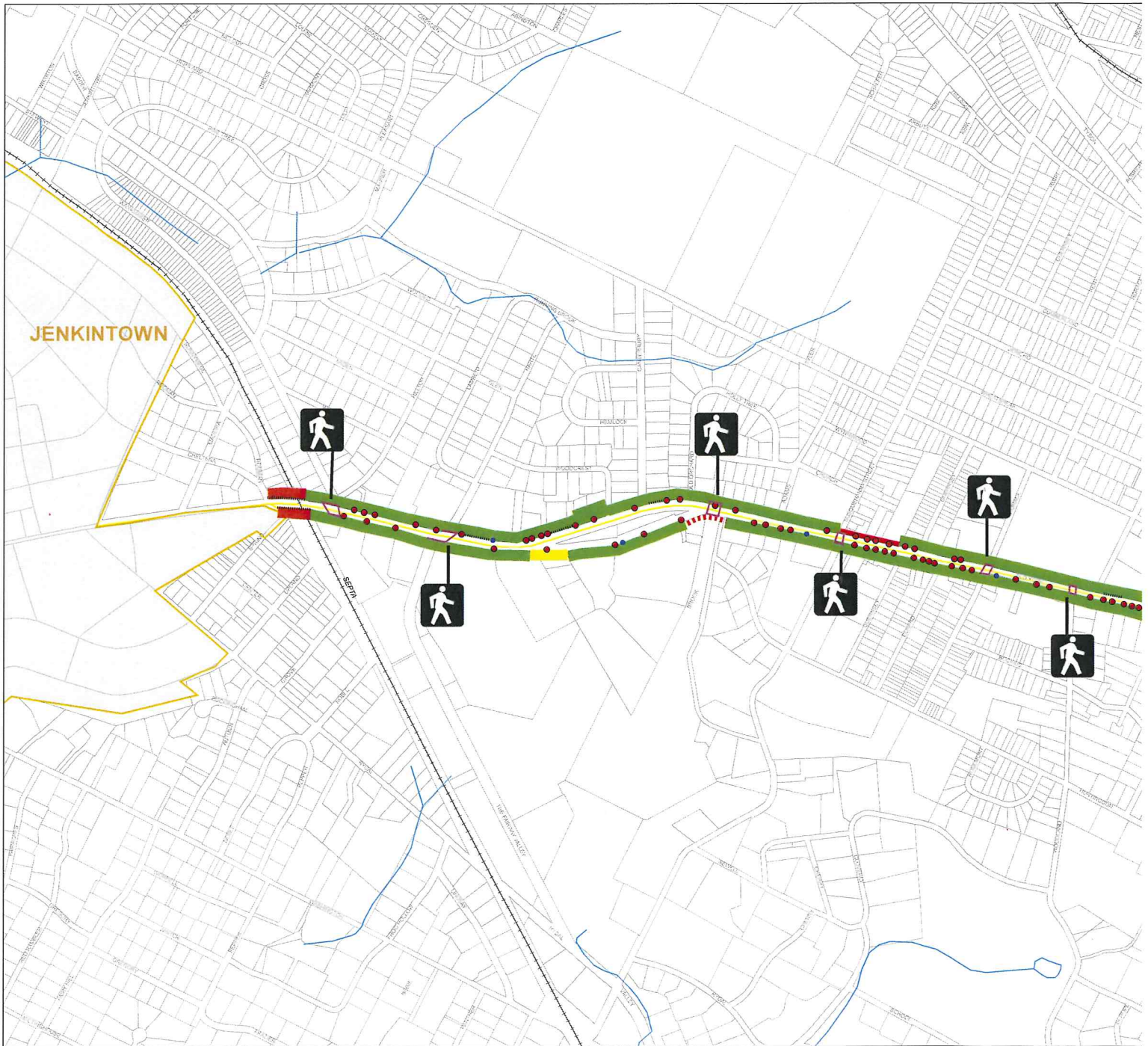


Figure 2.9



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Old York Road Corridor Improvement Study Abington Township **PEDESTRIAN FACILITIES**

- Railroad
- Streams
- Municipal Boundary

- Sidewalk Width < 4'
- Sidewalk 4' to 5'
- Sidewalk Width > 5'
- Sidewalk Under Construction

- Good to Fair Sidewalk Condition
- Fair to Poor Sidewalk Condition
- Poor Sidewalk Condition
- Crosswalk

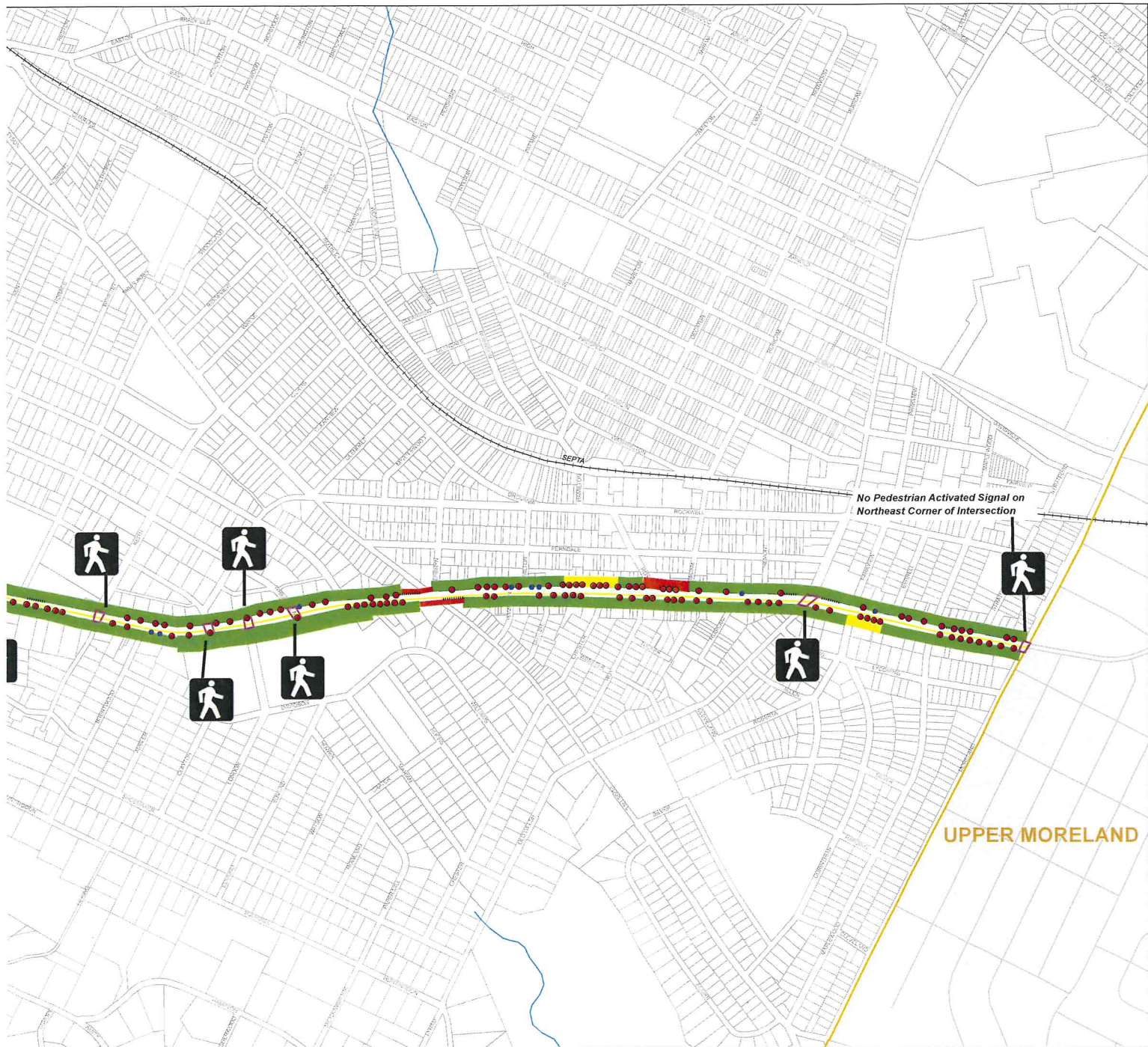



Figure 2.10



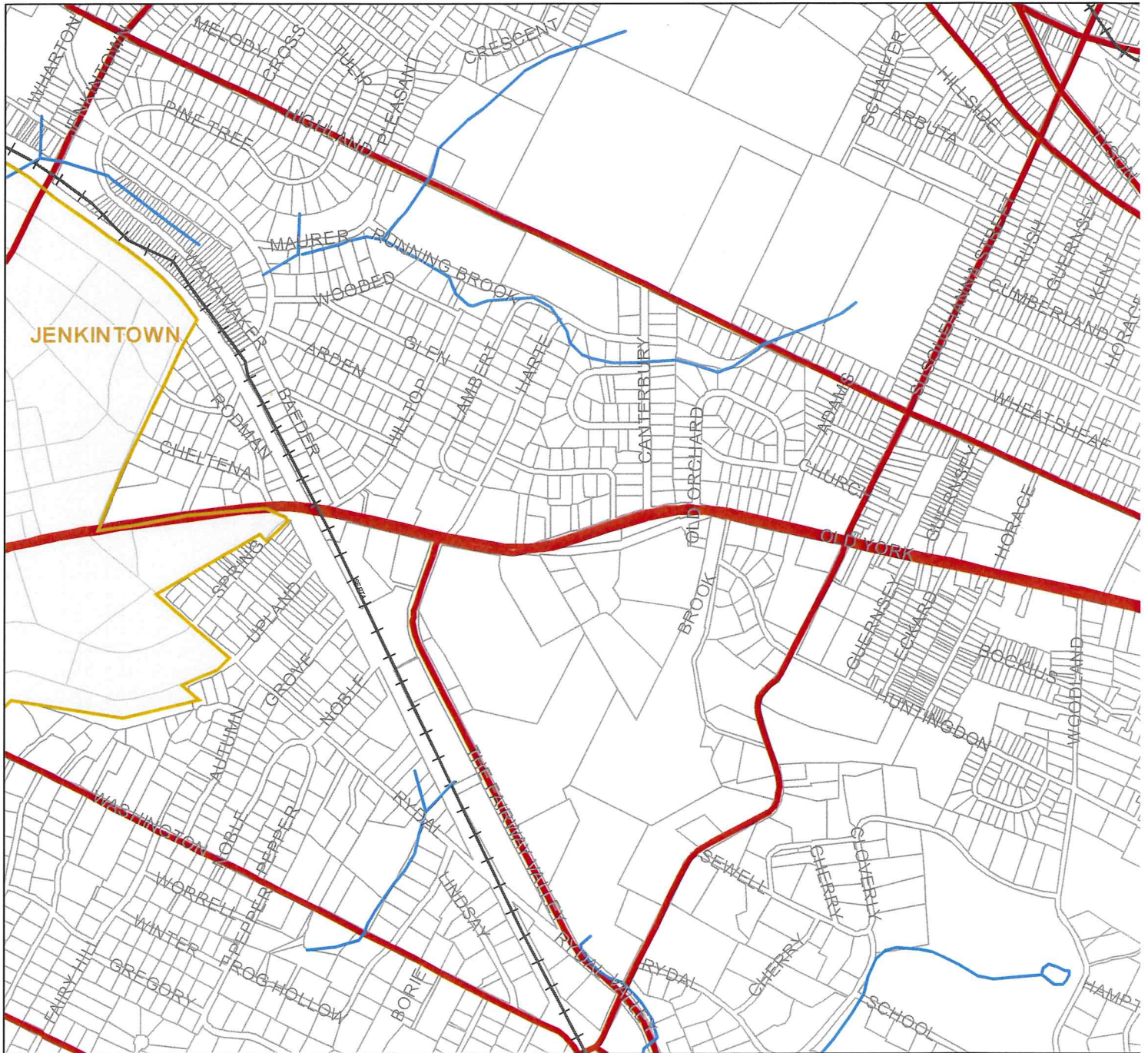
0 500 1000 Feet

- Driveway Curb Cuts
- Driveway Curb Cuts With No Access
-  Pedestrian Activated Crossing Signal
- Curbs in Poor Condition



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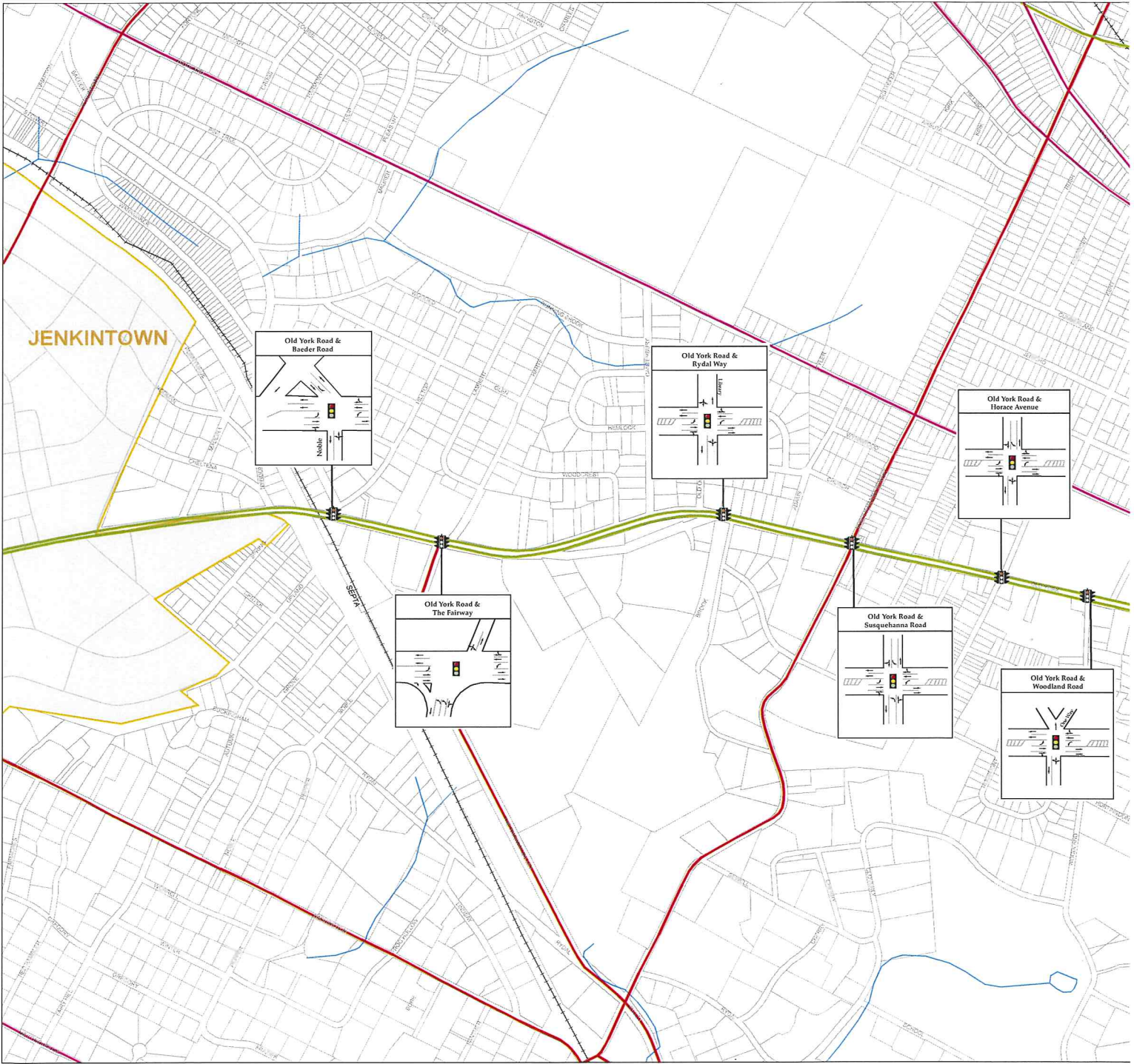
August, 2007



Old York Road Corridor Improvement Study Abington Township

ROADWAY JURISDICTIONAL CLASSIFICATION

-  Railroad
-  Streams
-  Municipal Boundary
-  State Roads



Old York Road Corridor Improvement Study Abington Township

ROADWAY FUNCTIONAL CLASSIFICATION

-  Railroad
-  Streams
-  Municipal Boundary
-  Urban Other Principal Arterial
-  Signalized Intersection
-  Urban Minor Arterial
-  Urban Collector

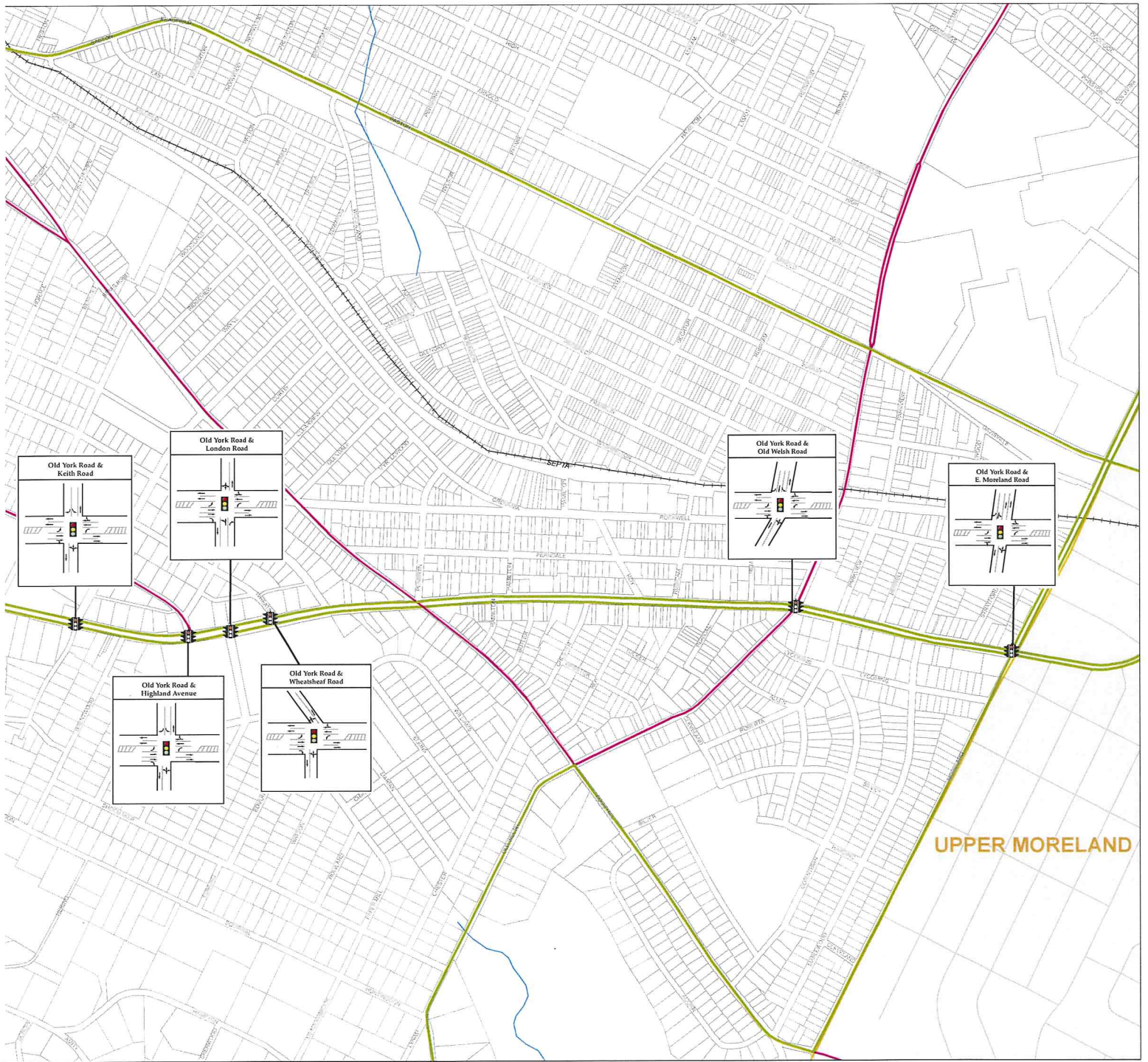
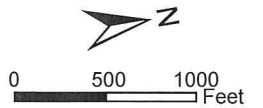


Figure 2.12



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Old York Road Corridor Improvement Study Abington Township

TRANSIT FACILITIES

- | | | |
|---|--|--|
|  Old York Road |  SEPTA R3, West Trenton (Regional Rail) |  Regional Rail Stations |
|  Railroad |  SEPTA R2, Warminster (Regional Rail) |  Bus Stop |
|  Streams |  SEPTA Route 55 (Bus) |  Bus Stop with Bench |
|  Municipal Boundary |  SEPTA Route 22 (Bus) |  Bus Stop with Shelter |

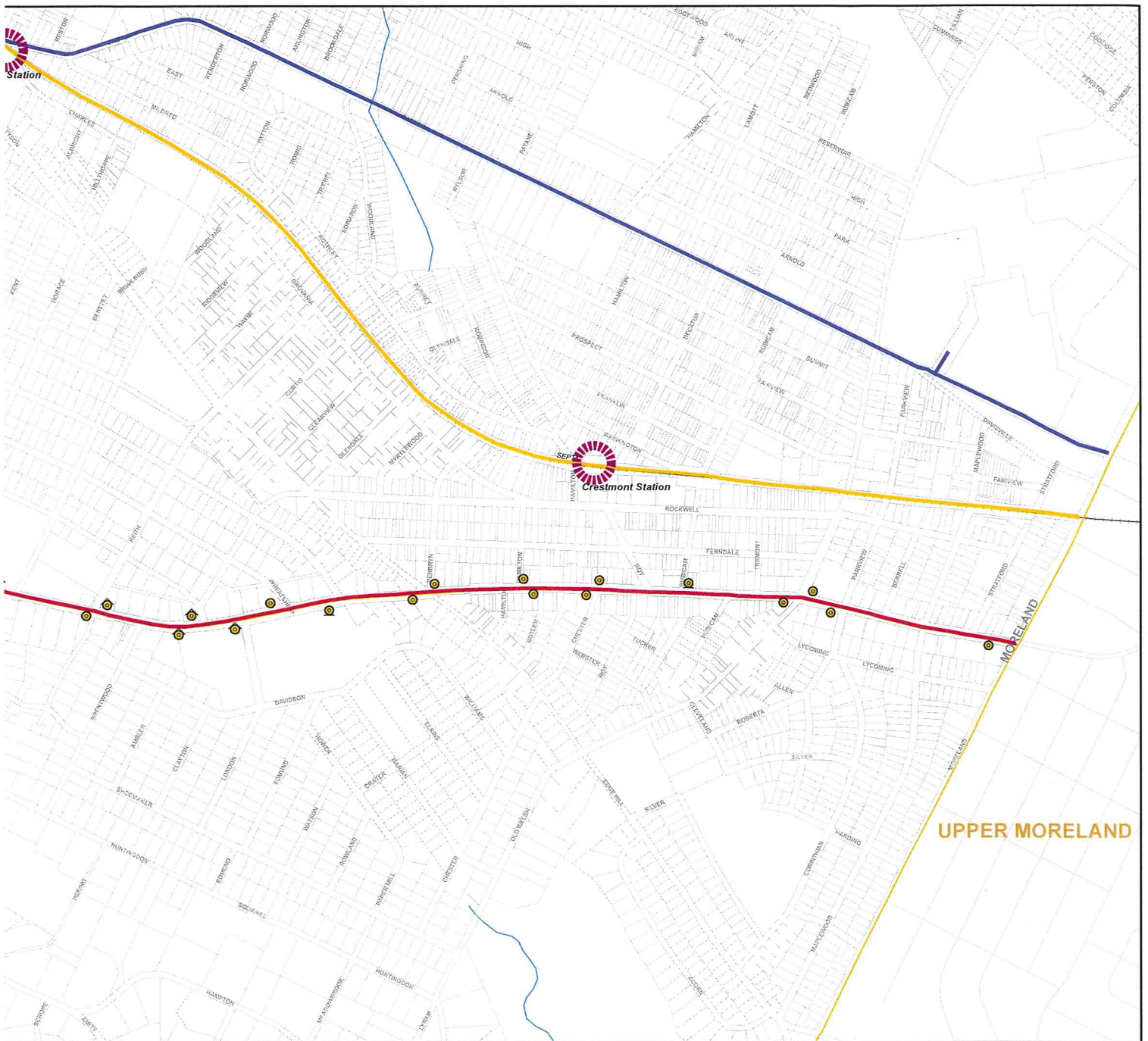
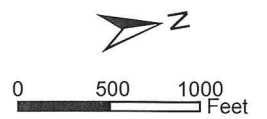
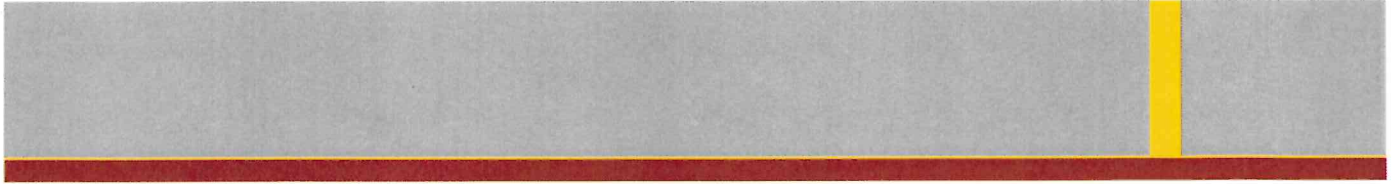


Figure 2.13



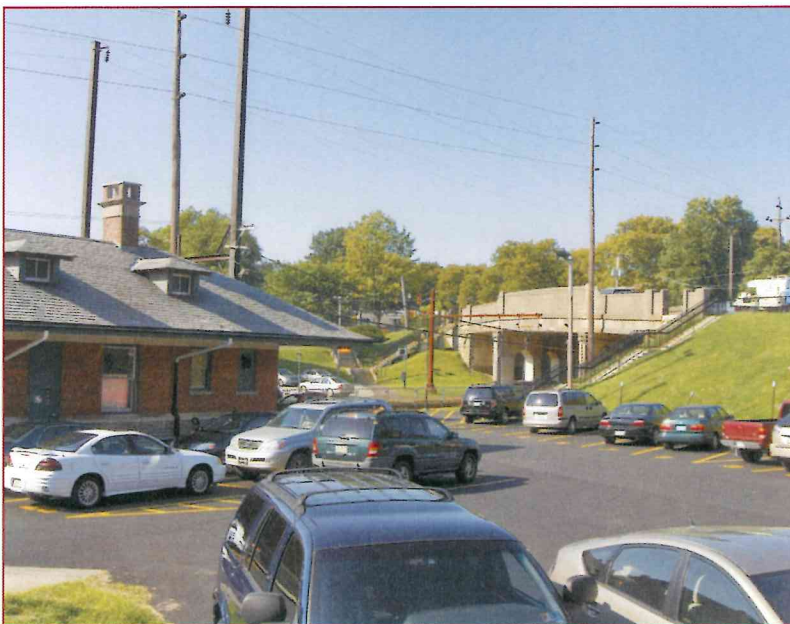


ASSETS, CONSTRAINTS, AND OPPORTUNITIES

The inventory of physical conditions (Chapter Two) and market circumstances (Chapter Three) have been reviewed, analyzed, and then synthesized into a summary of Assets, Constraints, and Opportunities for the corridor.

Assets are aspects of the corridor's current situation that are positive factors for Abington Township and that may form a foundation upon which to capitalize (Figure 2.14). Constraints are aspects of the corridor that are negative factors and that will have to be overcome in some manner to realize an improved future (Figure 2.15). Opportunities are the initial identification of potential possibilities toward an improved future (Figure 2.16).

Assets, Constraints, and Opportunities for the corridor are presented in text and mapped formats on the following pages.



ASSETS

- Vehicular connection to PA Turnpike.
- Vehicular connection to Center City.
- Presence of locally-important shopping areas (Baederwood & Target).
- Presence of locally-important eating and drinking establishments.
- Focused area for health services.
- Substantial residential population exists adjacent to and nearby corridor.
- Access provided to Center City via SEPTA's R-3 West Trenton Regional Rail line.
- Township Complex located on corridor.
- Hospital on corridor with a large employee base and regional draw for patients and visitors.
- Presence of historic houses and churches.
- Presence of Abington Free Library.
- Nearby PSU Abington Campus draws close to 3,500 students, faculty and staff to the area.
- Two large institutions are potential planning and development partners (PSU Abington Campus and Abington Memorial Hospital).
- Sidewalks are present throughout the corridor.
- Pedestrian activated lights and crosswalks are present throughout most of the corridor.
- Views are afforded at high points along the corridor.
- Bridge replacement project planned over the SEPTA rail lines (near Noble Station).
- Developers are interested in varied locations along the corridor.
- Available land exists for development and/or preservation (Rydal Park).
- SEPTA Route 55 bus service between Center City and Doylestown with frequent stops located along the length of the corridor.
- Parkway setting adjacent to Old Old York Road.
- Street trees throughout most of the corridor.
- Periodic landscaped medians along the corridor.
- "Green oasis" present in front of Abington Memorial Hospital.

CONSTRAINTS

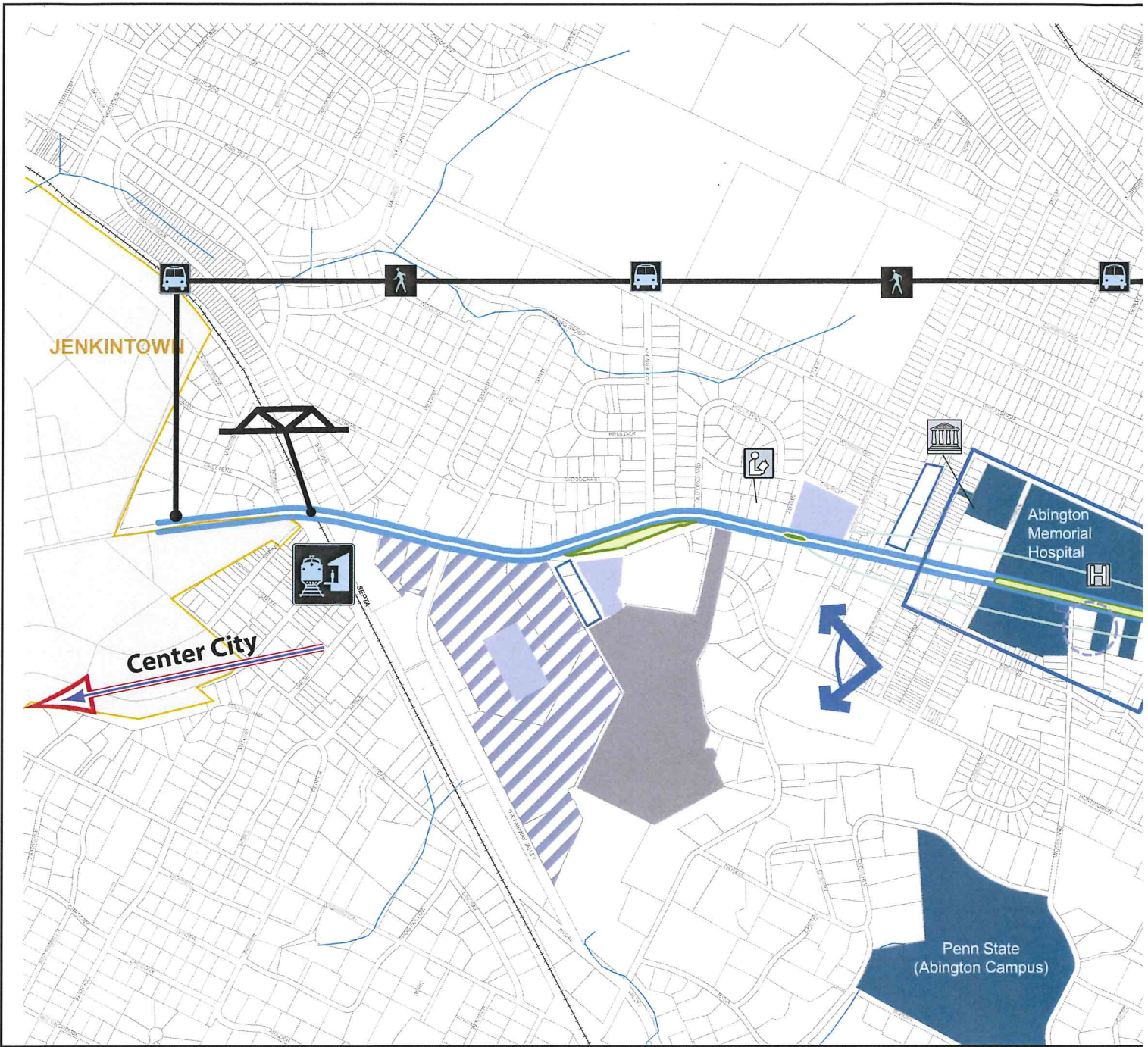


- Presence of vacant and underutilized buildings and parcels along the length of the corridor.
- Excessive amount of surface parking lots.
- Shallow and narrow parcels north of Edgehill Road restrict redevelopment opportunities.
- Wide right-of-way, fast vehicular traffic, and heavy traffic volumes deter pedestrian crossing of Old York Road and make for an inhospitable environment.
- Transit-oriented development potential adjacent to the Noble Train station is unrealized.
- Abundant driveway curb cuts throughout the corridor.
- Vehicular speeding north of Edgehill Road.
- Unsafe and physically-constricted intersection with Susquehanna Road.
- Large areas of vehicular storage associated with car dealerships.
- Insufficient loading areas for car dealerships.
- Lack of “Main Street USA”- type shopping area.
- Multiple branding techniques and sporadic locations of banners are not visually compelling.
- Inconsistent landscaping and lighting.
- Landscape within medians not thriving.
- Lack of pedestrian amenities (planters, benches, trash receptacles, drinking fountains).
- Lack of bicycle facilities/opportunities.
- Potential of Penn State Abington Shuttle and Abington Township’s LINK shuttle service is unrealized.
- Restricted cartway and sidewalk under the Edgehill Road bridge.
- Poorly marked bus stops.
- Overhead utility lines north of Edgehill Road are unsightly.
- Lack of wayfinding to Abington attractions.
- Municipal Building activity occurs in the back and does not contribute to the street life along Old York Road.

OPPORTUNITIES


















- “Infill” blocks and rehabilitate structures.
- Consolidate and redevelop tracts with new uses.
- Create mixed-use nodes in walkable settings along the corridor.
- Build parking structures in selected locations.
- Change orientation of building/parking along street frontage.
- Take advantage of underutilized and vacant properties to promote new retail/eating and drinking/cultural venues and live-work settings.
- Provide civic uses in a Town-Center-like atmosphere.
- Reorient Township Building to encourage activity along the Old York Road frontage.
- Redevelop the Fairway Shopping Center, Baederwood Shopping Center and Rydal Park simultaneously as part of an all-encompassed plan.
- Implement traffic calming elements at selected locations, especially at intersections where pedestrians are likely to want to cross Old York Road.
- Employ new strategies for vehicular storage (i.e. vertical stacking and structured parking).
- Create a common loading area for vehicle loading and unloading to be shared by multiple auto dealerships.
- Create a “branding” identity for whole corridor.
- Create special services district management entity along corridor.
- “Underground” overhead utilities through public/private partnerships as part of new development projects.
- Take advantage of views into and over the adjacent landscape.
- Take advantage of R-3 Noble station for Transit-oriented Development.
- Provide continuity in streetscape amenities (i.e. pedestrian lighting, banners, street trees, paving patterns and benches).
- Supplement median plantings with native plant species tolerant of urban and drought conditions.
- Supplement additional plantings through planters attached to pedestrian lights and/or banner poles.
- Consolidate access points to multiple properties.
- Create a joint venture shuttle service funded and operated by Abington Township and Penn State Abington.
- Improve intersection operations. 🚗



Old York Road Corridor Improvement Study, Abington Township

ASSETS

-  Old York Road
-  Railroad
-  Streams
-  Municipal Boundary
-   Township complex and library on corridor
-  Shopping center
-  Religious institutions and historic resources
-  Institutions that draw high numbers of employees and visitors
-  Sizable tract for development
-  Sidewalks are present along the corridor
-  Street trees
-  "Parkway" setting
-  Landscaped median
-  Planned bridge replacement project (by PennDOT)

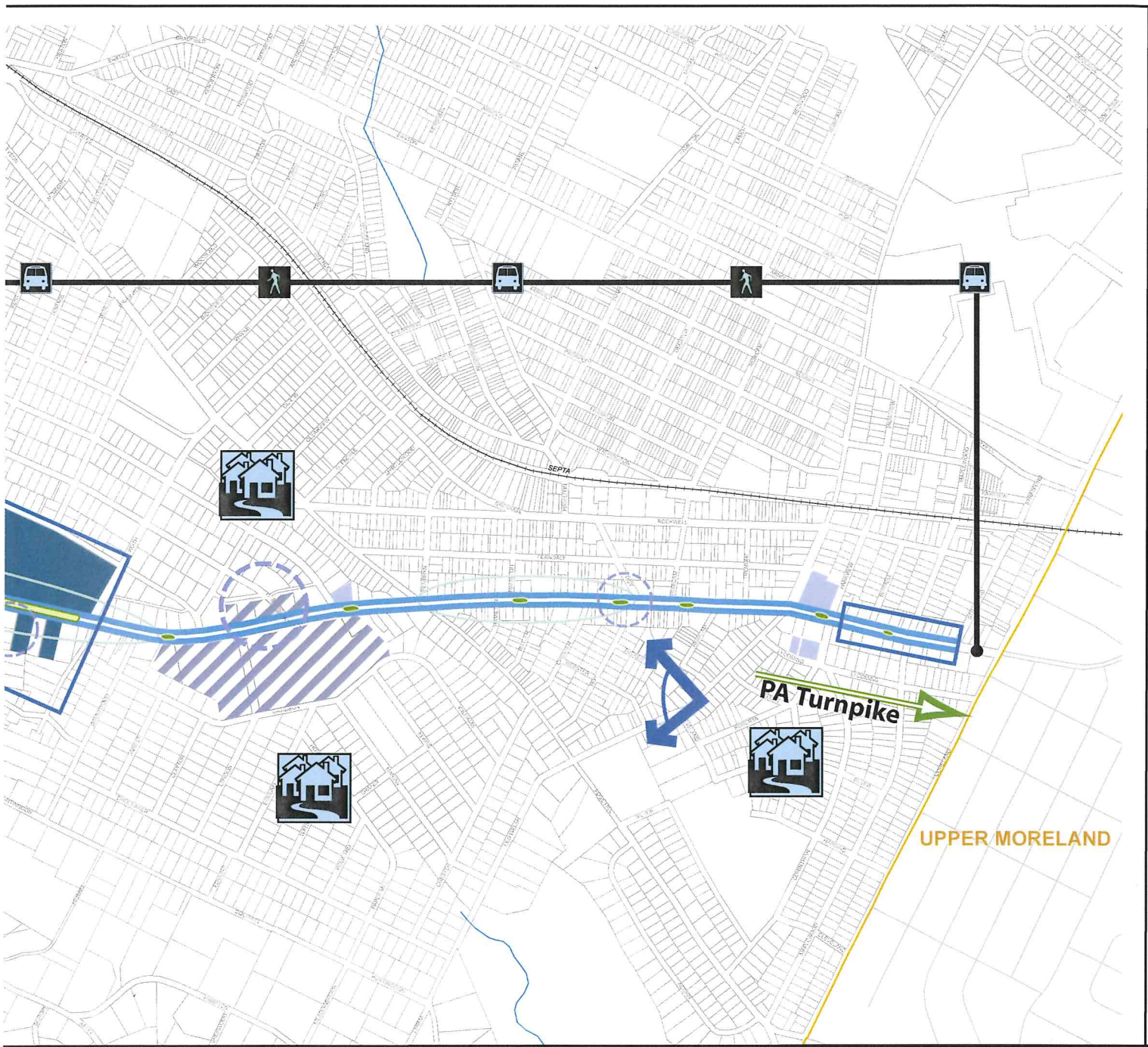






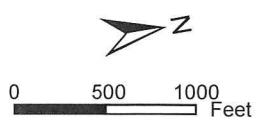
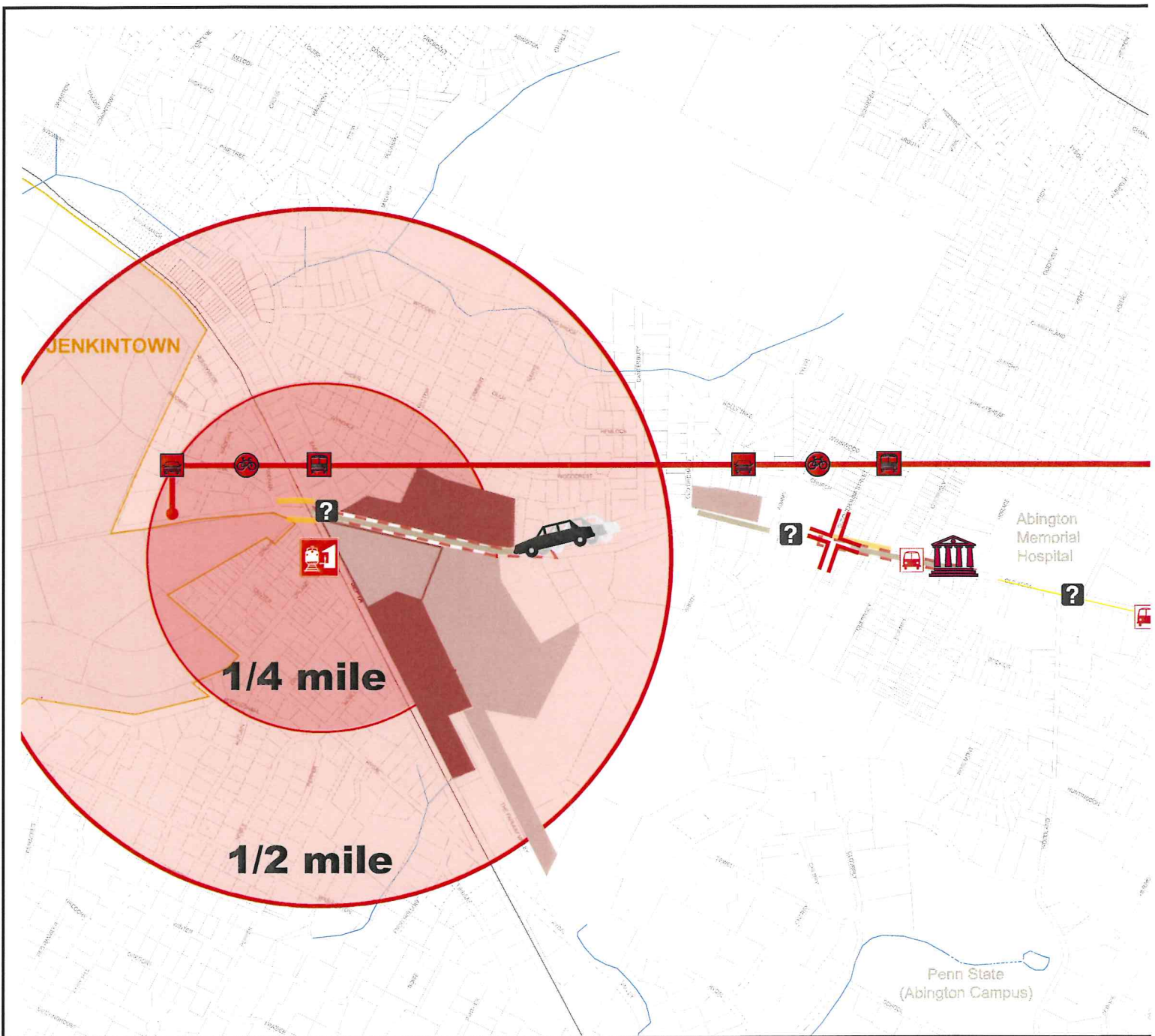


Figure 2.14

-  SEPTA Route 55 bus service between Center City and Doylestown
-  Pedestrian activated signals and crosswalks
-  SEPTA R-3 Regional Rail service between Center City and West Trenton
-  Substantial residential population nearby

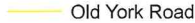





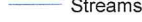







-  Popular eating and drinking establishments
-  Health services
-  Views to rolling terrain





Old York Road Corridor Improvement Study, Abington Township

CONSTRAINTS

- | | | |
|---|---|---|
|  Old York Road |  Frequent driveway curb cuts |  Poor/unsafe intersection geometry |
|  Railroad |  Lack of landscaping in medians |  Poorly marked bus stops |
|  Streams |  Large areas of surface parking |  Lack of on-street parking |
|  Municipal Boundary |  Shallow and narrow parcels restrict redevelopment opportunities |  Lack of bicycle mobility/facilities |
| |  Large areas of vehicle storage |  Untapped potential of Penn State Abington and Abington Township shuttle service |

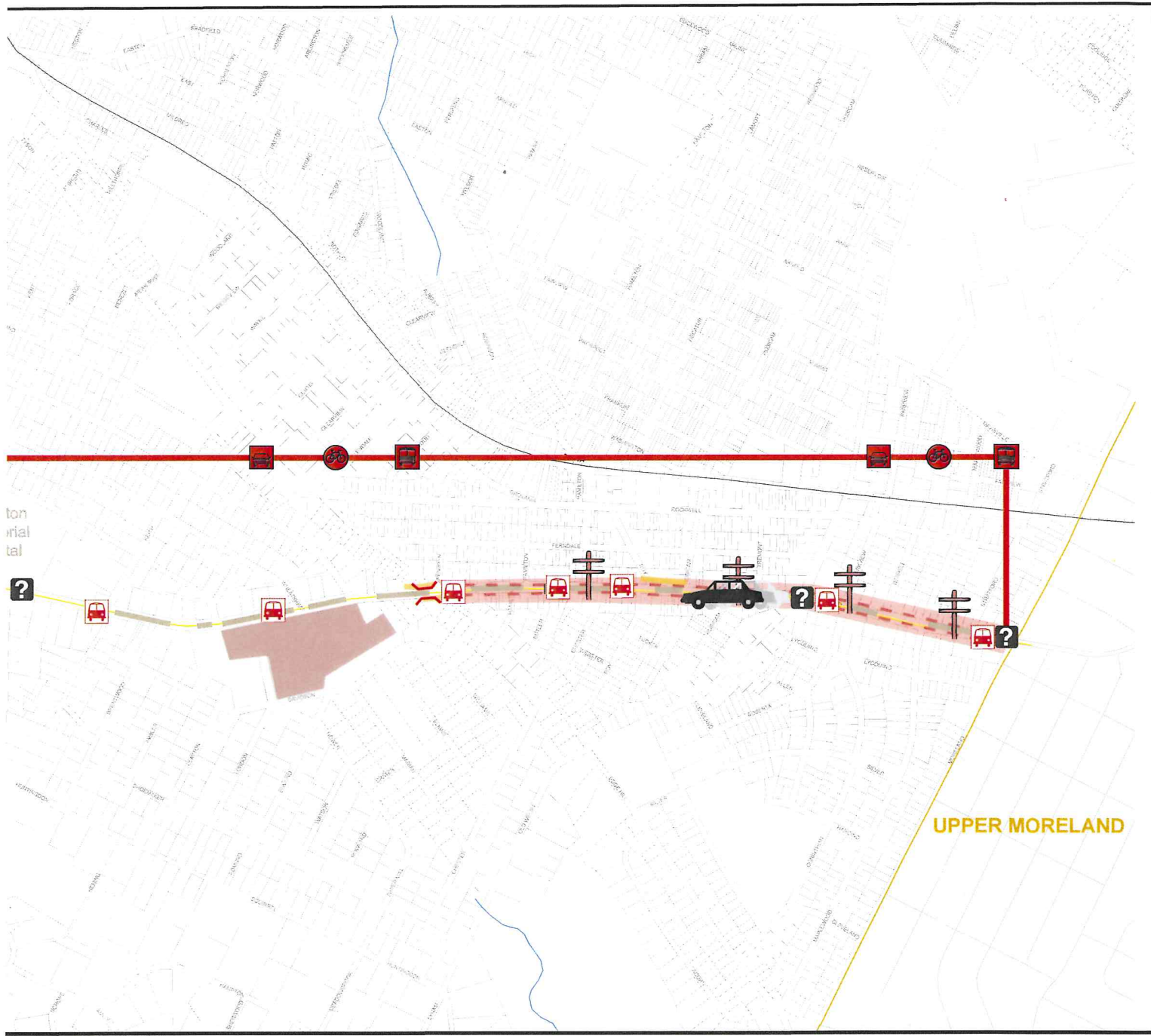






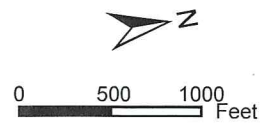
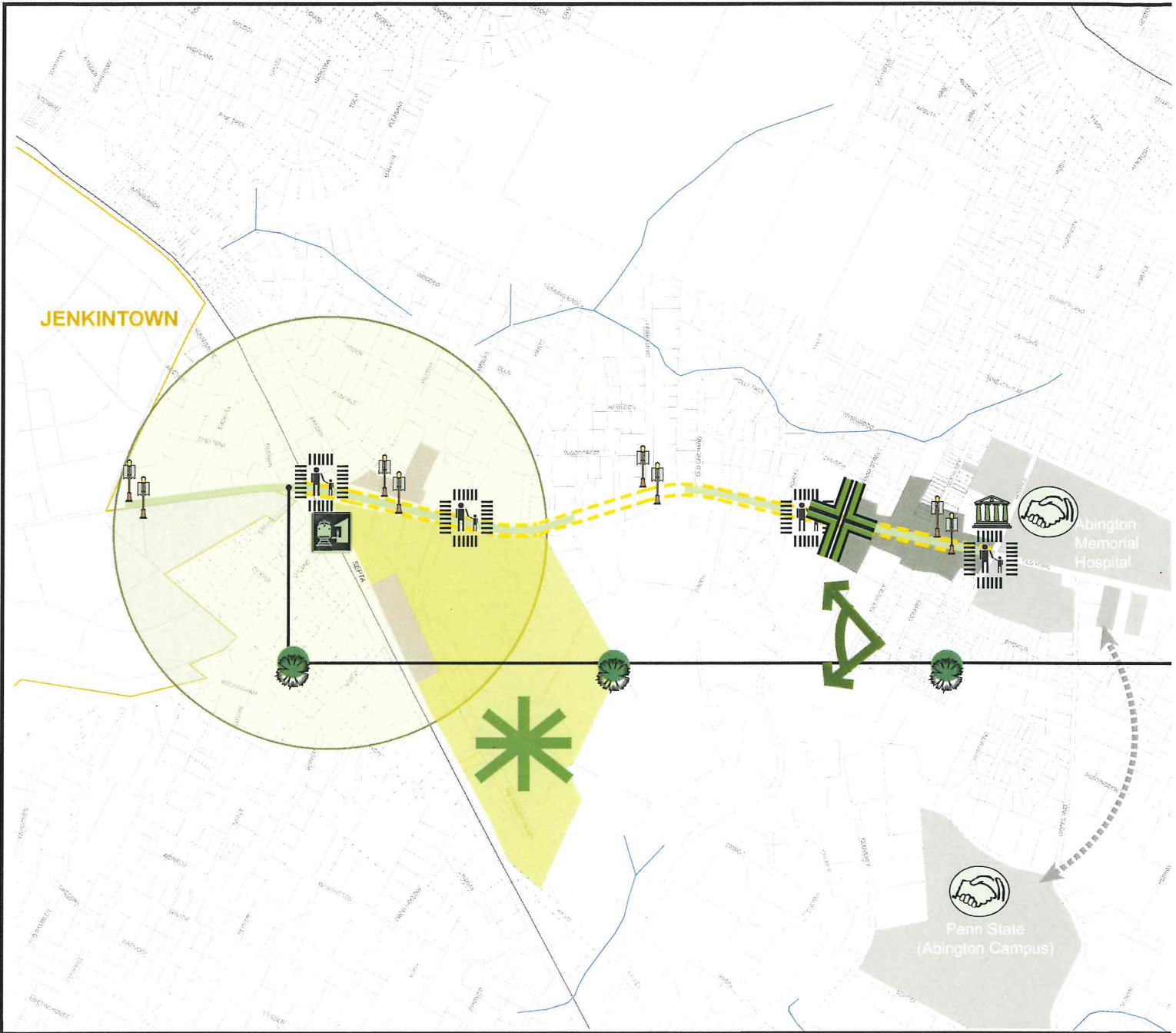


Figure 2.15

-  Municipal building turns its back to Old York Road
-  Restricted cartway and sidewalk
-  Lack of wayfinding to Abington attractions
-  Vehicular traffic speeding
-  Overhead utility lines
















 Transit-oriented development potential unrealized





Old York Road Corridor Improvement Study, Abington Township





OPPORTUNITIES




-  Old York Road
-  Railroad
-  Streams
-  Municipal Boundary
-  Provide continuity in streetscape and include additional plantings
-  Add median plantings with native plant species tolerant of urban and drought conditions
-  Create a common loading area for vehicle loading and unloading to be shared by multiple auto dealerships
-  Create mixed-use "nodes" in walkable settings
-  Large-scale institutions draw employees, visitors and patients/students
-  "Infill" blocks and rehabilitate structures, promote new retail/eating and drinking/cultural venues and live-work settings
-  "Underground" overhead utilities through public/private partnerships as part of new development projects
-  Supplement additional plantings through private planters and public planters attached to pedestrian lights and or banner poles
-  Implement traffic calming elements at select locations, especially at intersections where pedestrians are likely to cross Old York Road
-  Large-scale institutions identified as potential partners
-  Improved relationship between Township Building and frontage along Old York Road

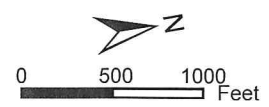


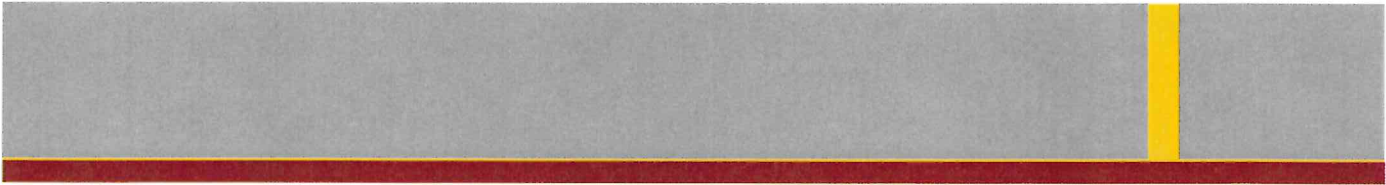
UPPER MORELAND

Figure 2.16

-  Create a "branding" Identity
-  Take advantage of SEPTA R-3 Noble Station for Transit Oriented Development
-  Take advantage of views into and over the adjacent landscape
-  Improve safety at intersection

-  Potential Town Center
-  Change orientation of building/parking along street frontages and consolidate access points to multiple properties
-  Strengthen connections between PSU Abington and Abington Memorial Hospital





MARKET ANALYSIS

EXECUTIVE SUMMARY

DEMOGRAPHIC CHARACTERISTICS

A study area was delineated for the housing market and retail market analysis that focuses on a portion of Abington Township conveniently accessible to Old York Road and The Fairway. Demographic characteristics are compared to trends in the township as a whole and to Montgomery County. The population growth rate in the study area has been modest since 1990, approximately 2.5 percent over the 17-year period and static in the township overall. In contrast, Montgomery County experienced a 16 percent increase in population during this same period. The number of households has grown at a slightly faster rate in each of the three jurisdictions analyzed, indicating a somewhat smaller household size. At the same time, the population throughout the region is aging, with the oldest median age found in the study area at 44.7 years.

Population projections indicate that the township should expect little change in the number of residents between 2010 and 2015. While the growth rate is anticipated to slow in the county, it would add approximately 20,600 new residents between 2010 and 2015. The county's growth rate is also projected to outpace the larger DVRPC region to 2025, a trend that could affect housing market demand in the study area, which has several attractive development sites, some in close proximity to mass transit.

Household income is relatively consistent across the area, with the median household income hovering at about \$79,000 in 2007. The study area is a powerful economic engine, providing approximately 17,000 jobs, which accounts for about 4 percent of the employment in the entire county. Nearly half of the jobs are in the education, health and social service category, with Abington Memorial Hospital alone providing about 5,000 of the 8,200 jobs in the category.

HOUSING MARKET

The current housing supply in the study area stands at about 18,250 units. The growth in the number of housing units in the study area and the township has kept pace with growth in the number of households. Given the generally static conditions in population and household growth in the township, it is not surprising to find a negligible change in housing supply. Similarly, housing vacancy rates have been stable and extremely low since 1990, about 3 percent in the study area and the township and about 4 percent in the county. In total there were only 272 vacant units for rent in the township in 2000, and only 137 vacant units for sale.

Housing values, however, experienced an enormous jump between 2000 and 2007, rising by slightly more than 50 percent in the study area, township and the county in constant dollar terms, i.e., accounting for the effects of inflation. For example, the median housing value in the township as a whole grew to \$280,841 from \$182,274 between 2000 and 2007. The median housing value in the study area is even higher, rising to \$315,618 from \$208,882 in the same period, equaling housing values countywide.

These conditions have implications for the future housing market. Since there is virtually no surplus housing in the local or broader area and since housing values in Abington parallel values in the county (indicating an attractive generally attractive stock), there may be an opportunity to redirect some of the population growth projected for Montgomery County to sites in Abington, particularly sites in close proximity to the Noble SEPTA station.

The issue of housing affordability will also affect demand for new units in Abington and the study area. Currently about 9 percent of the for-sale housing stock in the study area and the township is affordable to households with incomes less than \$40,000, and that group makes up about 25 percent of all households. It appears that an

expansion of the housing inventory at the low end of the for-sale market, considered here to be under \$199,000, would find willing buyers. A comparison of single-family home prices with prices of 1- and 2-bedroom condominiums in the area indicates that condominium-type housing, whether in townhouses or larger multi-family buildings would also find a willing market.

Additional support for the housing market could come from two major economic generators in the study area, Abington Memorial Hospital and Penn State Abington. It is not uncommon for employees to want to live close to their jobs in an attempt to reduce travel time and cost, increase their leisure time, and improve their quality of life. Hospital employees, the single largest group of employees in the study area, could affect demand for both high-end and low-end housing units. Penn State Abington sees an increasing trend in the number of students enrolling from South Jersey, which is creating demand for off-campus housing. This group too can spur demand for additional housing in the study area.

RETAIL MARKET

The primary trade area delineated for the retail market analysis extends from East Moreland Road and the Abington Township boundary in the north to Township Line Road and the Abington Township boundary in the south. The eastern boundary of the trade area is formed by the Montgomery County border with Philadelphia County and Abington Township's border with Rockledge Borough. The western boundary of the study area roughly consists of Tyson Avenue, Roslyn Road and Easton Road. A primary trade area represents the geographic area from which retailers get most of their repeat business. Typically 70 percent of retail store sales come from residents who live in the primary trade area. The primary trade area could extend for about 1 ½ to 2 miles (or a 5-to-10 minute drive) for a retail mix that resembles a neighborhood or community shopping center, i.e. retail facilities anchored by a large discount

department store (like Target), a "category-killer" store (like Barnes & Noble), or a large supermarket (like Giant or Whole Foods). The Willow Grove Park Mall is not included in the Old York Road corridor primary trade area.

The principal retail centers in Abington Township include Abington Towne Center, Abington Shopping Center, Baederwood Shopping Center, and Noble Town Center. Other notable retail concentrations along Old York Road in Abington Township include free-standing stores such as Barnes & Noble and Jennifer Convertibles, and a small group of stores anchored by Raymour and Flannigan and Trader Joe's. In addition, Keswick Village in Glenside is an attractive neighborhood retail destination. The portion of the trade area in Jenkintown includes several concentrations of retailers, including the Shops at the Pavilion and downtown Jenkintown itself.

The key retail categories for most downtown trade areas include shoppers goods, convenience goods and eating and drinking places.¹ A measure of how well retailers are performing is an estimate of what proportion of household consumer expenditures is being captured by local retailers. As noted above, in a balanced retail market about 70 percent of a

¹ Shoppers goods, also known as comparison goods, refer to the types of goods for which shoppers travel greater distances to compare selection, price and quality. Included in the category are apparel and accessories, furniture and home furnishings, consumer electronics, and miscellaneous retail goods such as sporting goods, jewelry, luggage and leather goods, cameras and photographic equipment, and hobbies and toys.

Convenience goods include goods that are not typically price-sensitive, such as food and beverages, drug store items, and wines and liquors. These goods are typically purchased close to home, hence the term "convenience good."

store's sales will come from residents in its primary trade area. An analysis of retail sales and consumer expenditure data indicates that the shoppers goods retailers in the Old York Road trade area are capturing about 69 percent of the available consumer expenditures. Convenience goods retailers are capturing about 150 percent of the available expenditures in the trade area, which means that they are attracting a substantial amount of consumer expenditures from outside the primary trade area. This condition is undoubtedly the result of the trade area's highly visible, high-power food stores such as Whole Foods, Trader Joe's, and Giant Supermarket, as well as drug stores such as Walgreen's.

The concentration of automobile dealers in the trade area also attracts customers from outside the area. Abington Township's auto dealers appear to be capturing about 250 percent of available expenditures in the trade area, again indicating that a substantial amount of car sales comes from people living outside the primary trade area.

In the category of retailers that are important to a downtown economy, only restaurants appear to fall short of expected capture rates. Restaurants in the Old York Road trade area are capturing about 43 percent of the potential consumer spending for "food away from home." This condition is reflected in the relatively small number of sit-down and fast food restaurants in the corridor.

Given the relatively high capture rates in most retail categories it appears that there is room to expand the retail inventory. Discussions during focus groups and interviews with stakeholders indicated that many trade area residents prefer to shop locally in stores where they can meet their friends and neighbors. Many avoid repeat trip to nearby large regional malls. In fact, the interviews and focus groups revealed that many residents would like to see the introduction of smaller retailers who could expand the variety and selection of merchandise, rather than the addition of large-format retailers like Target or

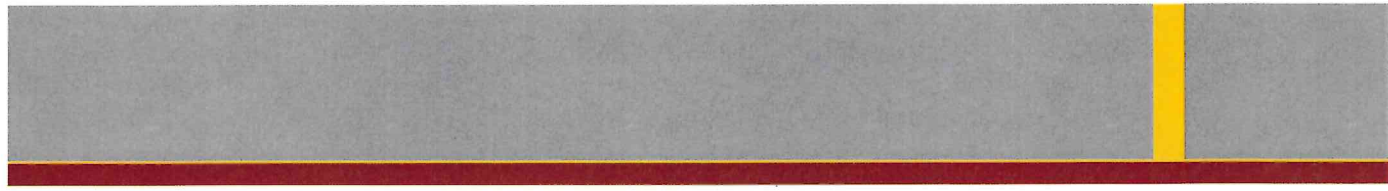
Barnes & Noble. There was near unanimous support for more sit-down family-oriented restaurants.

OFFICE MARKET

The office market analysis considers current conditions in the Horsham/Willow Grove submarket, which includes Abington Township. Currently, there is about 4.8 million square feet of Class A office space in the submarket with a vacancy rate of 11.9 percent. In comparison, the vacancy rate the broader Suburban Philadelphia market is currently 14.3 percent. Net absorption for the year in Class A buildings in the Horsham/Willow Grove submarket has been about 24,600 square feet at an average rent of \$23.66. A significant portion of the office inventory in the Horsham/Willow Grove submarket is located along I-276 in the Pennsylvania Business Campus. Vacancy rates are generally low in this complex and rents range from \$19.75 to \$23.75 per square foot.

The office inventory in the Old York Road corridor generally consists of low-rise buildings constructed between 1965 and 1981, although there have been more recent additions to the inventory such as Levy Medical Plaza and a newly opened 4-story building at the intersection of Old York Road and Brook Road. Office tenancy reflects the employment in the area, with an emphasis on medical offices and other professional firms such as lawyers, accountants and financial services. Vacancy rates in existing office buildings in the Old York Road corridor are low, and generally do not exceed the vacancy rates in the larger Horsham/Willow Grove submarket. At the same time, rents parallel or are somewhat lower than the submarket.

However, the ample amount of vacant Class A office space in the Horsham/Willow Grove submarket (approximately 571,500 square feet) together with the currently low absorption (about 25,000 square feet) indicates that the current market is weak. If net annual absorption were slightly higher than the current year-to-date



amount (24,600 square feet), there would be a sufficient supply to satisfy the demand for Class A space over the next 4 to 6 years. Despite these conditions, it is not unusual to see development of new office space in markets where vacancy rates consistently range from 9 to 10 percent. Several economic and physical characteristics of the study area can create opportunities for office development, such as the corridor's role as a major employment center and the proximity to mass transit. As noted above, the major employer in the study area and the county as a whole is the educational, health and social service category. The location of Abington Memorial Hospital in the center of the corridor is likely to continue to influence the type of office tenancy beyond the hospital's own office space, since proximity to the hospital is likely to provide the corridor with an advantage over other office concentrations in the county. The advantageous position of the Old York Road corridor is further enhanced by the availability of mass transit, particularly SEPTA's R3 line, and location of several vacant and underutilized sites within acceptable walking distance to the Noble Station.

HOTEL MARKET

There are currently no hotels in the Old York Road corridor study area, which extends roughly from Township Line Road in the south to Moreland Road in the north. The closest concentrations of hotels are near the intersection of Route 611 (Old York Road) with I-276 and the intersection of Route 309 (Fort Washington Expressway) with I-276. In all, there are 12 hotel properties at these locations with an inventory of 1,675 rooms. The majority of the hotels are major national chains providing accommodations, services and amenities ranging from upscale, midscale and economy levels. The largest portion of the room supply is found in midscale hotels (684 rooms), followed by upscale hotels (568 rooms), and finally, economy hotels (423 rooms).

Average annual occupancy for the 12 hotel properties was a healthy 69 percent between

2000 and 2006 (generally 65 percent occupancy is considered by hotel operators to be a benchmark for financial viability). Average room rates for upscale hotels range from \$149 to \$239 per night; for midscale hotels the range is \$99 to \$159; and for economy hotels, \$92 to \$112.

The primary market for these hotels is the business traveler. However, a detailed analysis of occupancy by day of the week revealed that Saturdays are generally the third busiest day of the week, indicating that leisure stays are an important component of the overall market.

Several factors indicate that the market is good for hotel development in the Old York Road corridor, including a relatively strong average occupancy rate, the concentration of jobs and economic activity in the corridor, and the absence of any hotels in close proximity to the employment center and general population in the study area. Given that only 25 percent of the rooms in the current hotel inventory are found in economy hotels, it appears that any addition to the supply should include an economy hotel such as Fairfield Inn by Marriott, Quality Inn, Holiday Inn Express, and MainStay Suites. A 100-room hotel could immediately be added to the current inventory without a significant adverse effect on the average occupancy rate, even if the number of overnight stays remained constant (which is highly unlikely).

PROPERTY CHARACTERISTICS

There are 207 lots in the study area that are accessible from either Old York Road or The Fairway. These lots contain a total land area of 9.2 million square feet. Most of the lots are controlled by individual property owners, particularly those lots located north of Edge Hill Road – a condition that would ordinarily make assembly of usable development sites difficult.

However, about 60 percent of the lot area accessible from either Old York Road or The Fairway is currently in the hands of a very few

owners. In fact only 8 entities control approximately 5.8 million of the 9.2 million square feet of the land in the study area accessible from either Old York Road or The Fairway. Although most of this land is already developed (except for the Rydal Waters site), a substantial portion of it is used for surface parking or storage of automobiles associated with businesses such as the Abington Towne Center, Noble Town Center, Baederwood Shopping Center, and the auto dealerships. These parcels offer potential opportunities for redevelopment, if parking areas could be reconfigured and development density increased.

DEMOGRAPHIC CHARACTERISTICS

INTRODUCTION

Demographic factors can affect various market sectors, but particularly residential and retail demand. Changes in the number of people living in a Primary Trade Area can alter the characteristics of a potential customer base in terms of household size and income, as well as age which can determine the type of housing that is in demand and the type of retail goods and services that are necessary to service the local population. The following section describes the changes in vital characteristics of the population living in the study area delineated for the Old York Road Corridor Improvement Study.

DELINEATION OF THE STUDY AREA

A study area was selected for the demographic analysis based on proximity and accessibility to Old York Road. Boundaries were determined in part by physical features such as large parks, country clubs, and rail lines that act as deterrents to convenient access to the corridor, and large commercial destinations that serve a broader region than the more locally-oriented uses observed in the corridor. By and large,

the boundaries of the study area follow the municipal boundaries of Abington Township, except for the western boundary. Jenkintown Borough is the only municipality other than Abington Township that is included in the study area. The boundaries of the study area, shown in Figure 3.1, are roughly as follows:

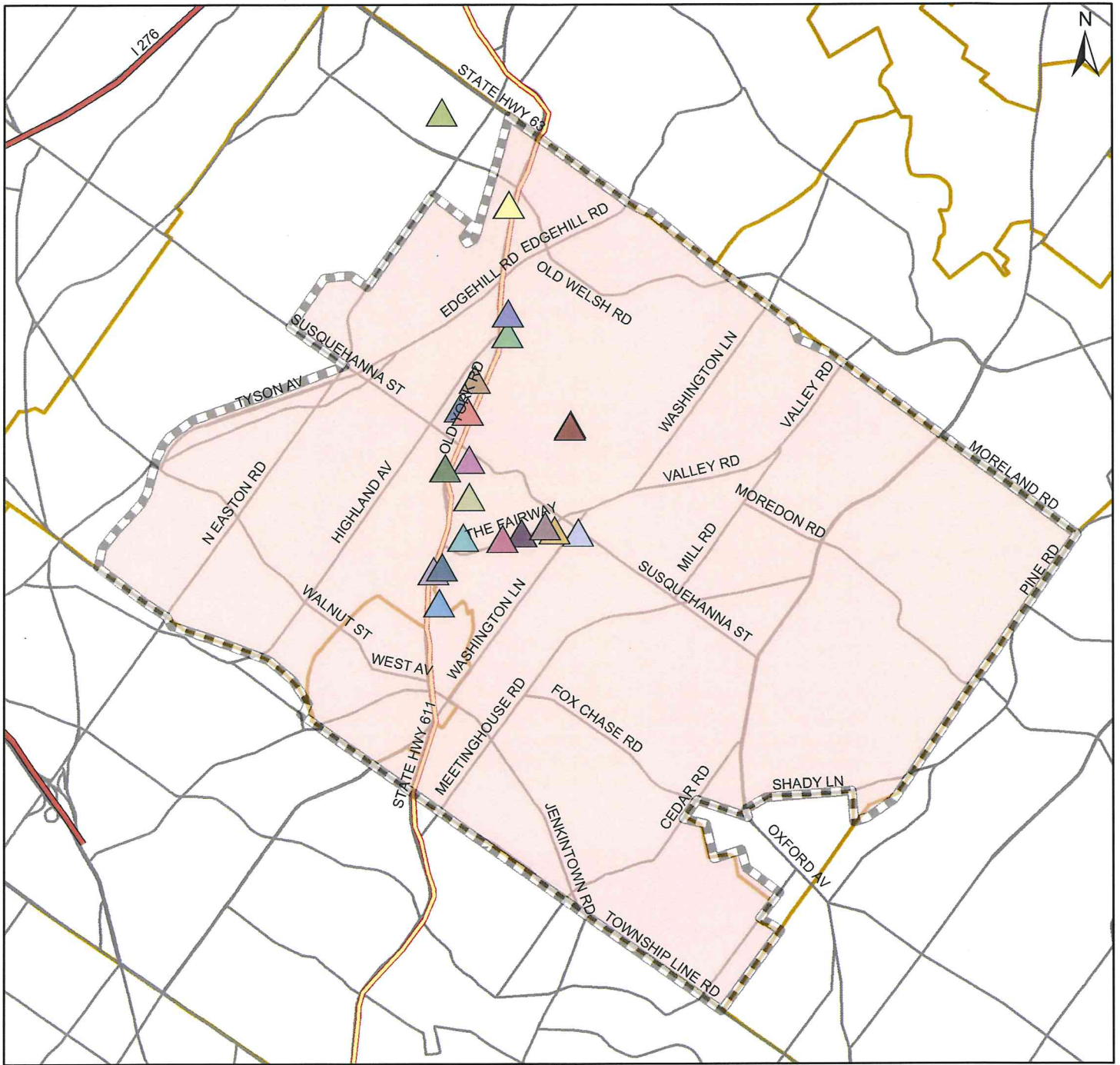
- East Moreland Road and the Abington Township boundary with Upper Moreland Township and Lower Moreland Township in the north;
- The Montgomery County Line and the Abington Township boundary with Rockledge Borough in the east;
- Township Line Road and the Abington Township boundary with Cheltenham Township in the south;
- Tyson Avenue, Roslyn Road, and Easton Road in the west.

Figure 3.1 also indicates that the major economic generators in the study area are concentrated on Old York Road south of Edge Hill Road and along The Fairway. These activity centers include Noble Town Center, Baederwood Shopping Center, Abington Memorial Hospital, Abington Towne Center, Abington Shopping Center, and the Abington Municipal Building, among others.

POPULATION TRENDS AND PROJECTIONS

The current population in the study area is estimated to be about 43,300, accounting for 77 percent of the Abington Township's population, which is approximately 56,300. The current population in the township represents only about 7 percent of the overall population in Montgomery County, which is approximately 789,500.

Both the study area and the township experienced extremely modest changes in



0 0.25 0.5 1 1.5 Miles

Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-1: STUDY AREA



Trade Area Segments	1990	2000	2007	Percent Change 1990-2000	Percent Change 2000-2007
Study Area	42,236	43,056	43,313	1.9%	0.6%
Town of Abington	56,322	56,103	56,333	-0.4%	0.4%
Montgomery County	678,111	750,097	789,528	10.6%	5.3%

Sources: U.S. Census 1990 and 2000; 2007; Estimates from ESRI Business Analyst.

Table 3.1 Population Change

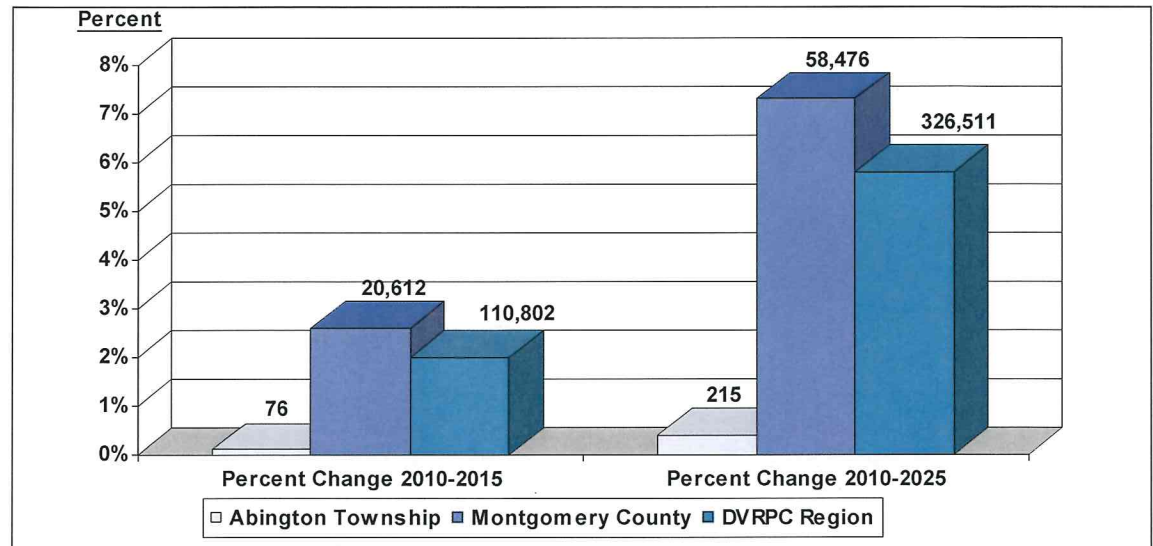


Figure 3.2 Population Projections: 2010 to 2025

population between 1990 and 2000, as well as from 2000 to 2007, as shown in Table 3.1. The population of the study area experienced a modest growth between 1990 and 2000, with 42,236 and 43,056 residents respectively – a gain of only 1.9 percent. During the same time period the township’s population was essentially static, i.e., a decline of 0.4 percent from 56,322 to 56,103 residents. Montgomery County as a whole saw the highest growth in population between 1990 and 2000, an increase of 71,986

residents or 10.6 percent. Growth in all areas between 2000 and 2007 was somewhat slower between 2000 and 2007, with growth rates falling below one percent in the study area and the township. Similarly, growth in Montgomery County dropped from 10.6 to 5.3 percent during this time.

According to projections by the Delaware Valley Regional Planning Commission (DVRPC) the population of Abington Township will be

relatively stable between 2010 and 2025 with growth anticipated at less than 1 percent (Figure 3.2). By comparison growth in Montgomery County and the DVRPC region is expected to be healthy, with the county growing by 7.3 percent between 2010 and 2015, and the region by 5.8 percent. Thus market demand for either residential or retail uses would not be significantly influenced by a population increase in Abington Township.

AGE CHARACTERISTICS

An analysis of median age data indicates that the study area population is older than both the township as a whole and Montgomery County. On the whole, all three jurisdictions have a relatively old population, and the trend indicates that the population is continuing to age. Between 2000 and 2007 the median age increased in the study area, as well as in the township and the county. As shown in Table 3.2, the median age

in the study area is 44.7 compared with 40.2 in the county. Each of the jurisdictions experienced an increase in median age of more than 5 percent between 2000 and 2007.

A closer look at the distribution of age further demonstrates an aging population within the study area (see Table 3.3). The most notable and consistent shift in age groups was within the 50-64 year old category, increasing in all areas between 2000 and 2007. The most dramatic shift within this category was in the study area itself, where the number of residents in the 50-64 year old category grew to 20.7 percent of the population in 2007 from 16.2 percent in 2000. All of the younger age groups, i.e., 0-17, 18-34 and 35-49, experienced a slight decrease in their percentage of the overall population.

These patterns suggest the baby boomer generation is passing through age cohorts, and is beginning to result in the aging of a population in the study area, township and the county. This

Trade Area Segments	2000	2007	Percent Change 2000-2007
Study Area	42.3*	44.7	5.7%
Town of Abington	40.6	43.2	6.4%
Montgomery County	38.2	40.2	5.2%

Note: *Study Area Median Age is a weighted average of all Census Tracts
Sources: U.S. Census 2000; 2007; estimates from ESRI Business Analyst.

Table 3.2 Median Age

Trade Area Segments	0-17 Years		18-34 Years		35-49 Years		50-64 Years		65+ Years	
	2000	2007	2000	2007	2000	2007	2000	2007	2000	2007
Study Area	22.7%	20.7%	16.9%	16.8%	23.6%	21.1%	16.2%	20.7%	20.6%	20.8%
Town of Abington	23.6%	21.9%	17.6%	16.6%	24.0%	22.4%	15.8%	19.3%	19.1%	19.5%
Montgomery County	24.1%	23.5%	20.5%	18.7%	24.6%	23.7%	15.8%	18.8%	14.9%	15.2%

Sources: U.S. Census 2000; and ESRI Business Analyst, 2007

Table 3.3 Age Distribution

change could create a shift in demand for goods and services characteristic of a more mature population, including a residential demand common to empty nesters, such as downsizing to smaller apartments close to urban amenities, as well as independent living and assisted living facilities. In addition, the more mature age group typically has a higher income, which could affect the demand for retail goods and restaurants.

■ Households and Household Size

The number of households increased slightly in all areas between 1990 and 2000, as well as from 2000 to 2007. As shown in Table 3.4, the largest increase of 12.4 percent occurred between 1990 and 2000 in Montgomery County. While the county continued to experience a substantial increase in the number of households between 2000 and 2007, Abington Township and

the study area saw modest increases of about 1 percent.

The number of households in the study area increased at the same rate as the population between 1990 and 2000 (1.9 percent), and at a slightly faster rate (+0.6 percent) between 2000 and 2007, indicating little to no change in the average household size. Within Montgomery County the number households increased at a faster rate than the overall population between 1990 and 2000, 12.4 percent compared to 10.6 percent, but then slowed to the mimic the growth in population between 2000 and 2007, i.e., 5.3 and 5.5 percent respectively.

The average household size in the study area has remained lower than all other areas since 1990, and now stands at 2.42 persons per household (see Table 3.5). From 2000 to 2007,

Trade Area Segments	Total Households			% Change	% Change
	1990	2000	2007	1990-2000	2000-2007
Study Area	17,061	17,379	17,596	1.9%	1.2%
Town of Abington	21,543	21,690	21,843	0.7%	0.7%
Montgomery County	254,596	286,098	301,802	12.4%	5.5%

Sources: U.S. Census 2000; and ESRI Business Analyst, 2007.

Table 3.4 Number of Households

Trade Area Segment	Household Size			% Change	% Change
	1990	2000	2007	1990-2000	2000-2007
Study Area	2.37	2.42	2.42	2.3%	0%
Town of Abington	2.52	2.54	2.53	1.0%	-0.4%
Montgomery County	2.48	2.54	2.54	2.6%	0%

Sources: U.S. Census 1990, 2000; and ESRI Business Analyst, 2007

Table 3.5 Average Household Size

there was virtually no growth in household size among any areas. With its population, number of households and average household size experiencing extremely sluggish growth, it is likely that the younger population of both the study area and the township is leaving the area, while the older generation remains in their homes living in smaller households.

MEDIAN HOUSEHOLD INCOME

Between 1990 and 2000, median household income decreased in the study area by 4.3 percent in constant 2007 dollars from \$81,874 to \$78,384. Median household income in Abington Township and Montgomery County increased slightly, by 0.3 and 1.4 percent, respectively after adjusting for inflation (see Table 3.6). Between 2000 and 2007 median household income in the study area did not increase at all, while incomes in the township saw a modest gain of 1.3 percent. Montgomery County experienced the highest increase in incomes between 2000 and 2007, 3 percent. In 2007, median household

income was relatively the same in all three jurisdictions, ranging from about \$78,300 to \$79,800 in the county.

Relative to its surrounding areas, Abington Township demonstrated fairly comparable incomes to Boroughs and Townships to the north (Figure 3.3). Higher incomes were concentrated east of Old York Road, ranging between \$75,000 and \$124,999. A small portion of the northeast portion of the study area earned incomes ranging between \$30,000 and \$74,999.

In 2007, the distribution of household income was relatively similar in the study area, township, and county (see Table 3.7). The largest percentage of households was concentrated between the \$30,000 to \$74,999 income range. The second highest concentration among all areas was within the \$75,000 to \$124,000 range, followed by the \$125,000 and over income range, again for all areas. Among the jurisdictions considered in this analysis, the study area had the highest representation of households within the \$125,000 and over income

Trade Area Segment	1990	2000	2007	Percent Change 1990-2000	Percent Change 2000-2007
Study Area	\$81,874	\$78,384	\$78,394	-4.3%	0.0%
Town of Abington	\$77,082	\$77,297	\$78,301	0.3%	1.3%
Montgomery County	\$76,435	\$77,468	\$79,785	1.4%	3.0%

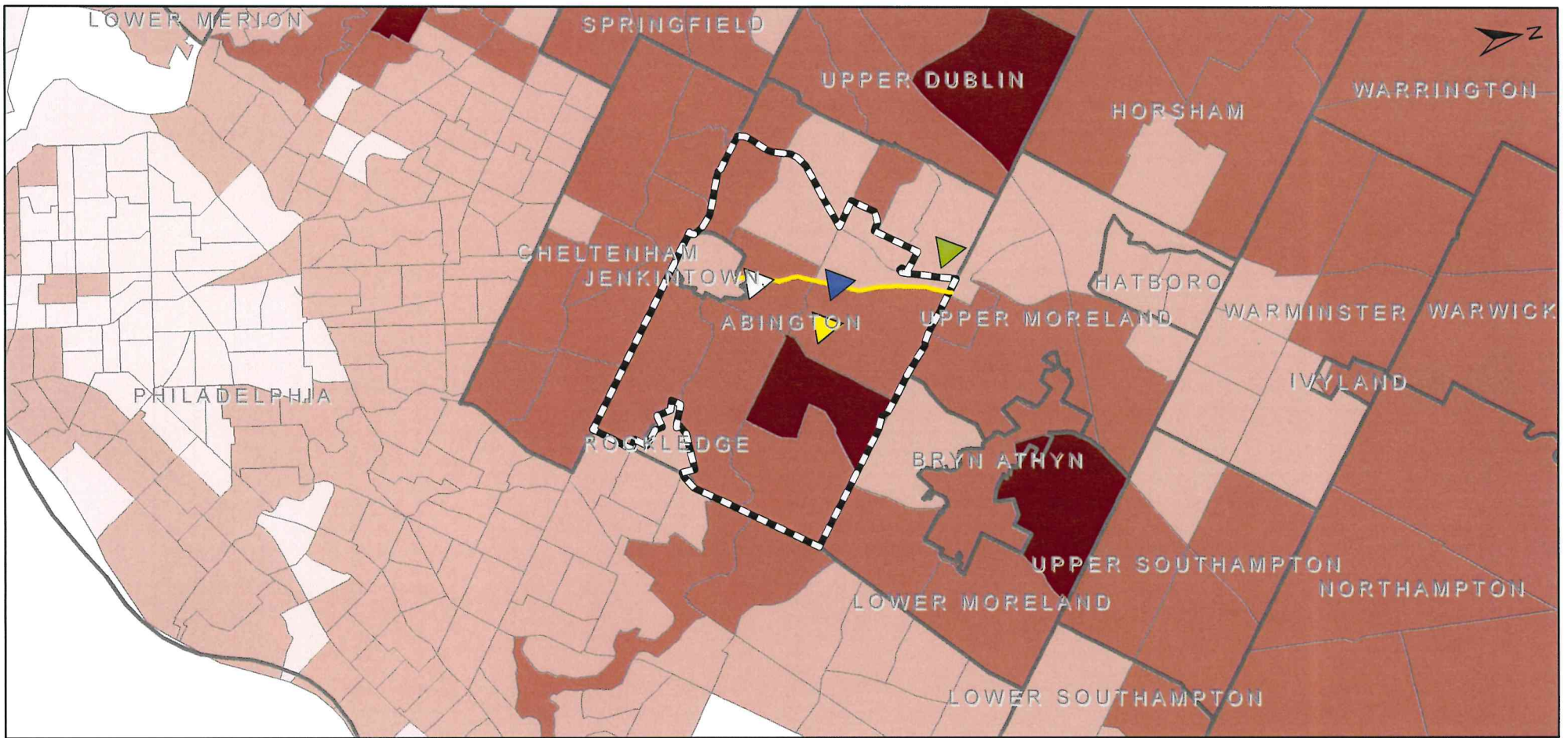
Sources: U.S. Census 1990 and 2000; and ESRI Business Analyst, 2007

Table 3.6 Median Household Income (In 2007 Dollars)

Trade Area Segment	Less than \$30,000	\$30,000 to \$74,999	\$75,000 to \$124,000	\$125,000 and over
Study Area	14.7%	32.5%	26.2%	26.9%
Town of Abington	14.2%	32.6%	29.0%	24.2%
Montgomery County	14.0%	31.8%	27.9%	26.4%

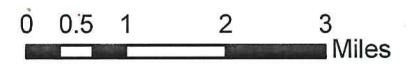
Sources: ESRI Business Analyst, 2007 Estimates

Table 3.7 Household Income Distribution: 2007



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-3: 1999 MEDIAN HOUSEHOLD INCOME (IN 2007 DOLLARS)



- | | | |
|------------------------|----------------------------|--------------------|
| Less than \$30,000 | Abington Memorial Hospital | Old York Road |
| \$30,001 - \$74,999 | Noble SEPTA station | Municipal Boundary |
| \$75,000 - \$124,999 | Penn State Abington | Study Area |
| Greater than \$125,000 | Willow Grove Mall | |

range (26.9 percent), as well as in the lowest income range (14.7 percent).

■ Employment Characteristics

There were approximately 17,100 employees in the study area in 2000 (see Table 3.8). Nearly half of the employment in the study area was concentrated in education, health, and social services, reflecting the importance of Abington Memorial Hospital and Penn State Abington to the local economy. The hospital alone currently employs approximately 5,000 people while the university has slightly more than 100 full-time professors. In all, there were 8,234 jobs in this category, comprising 48 percent of the total workforce of 17,139 persons.

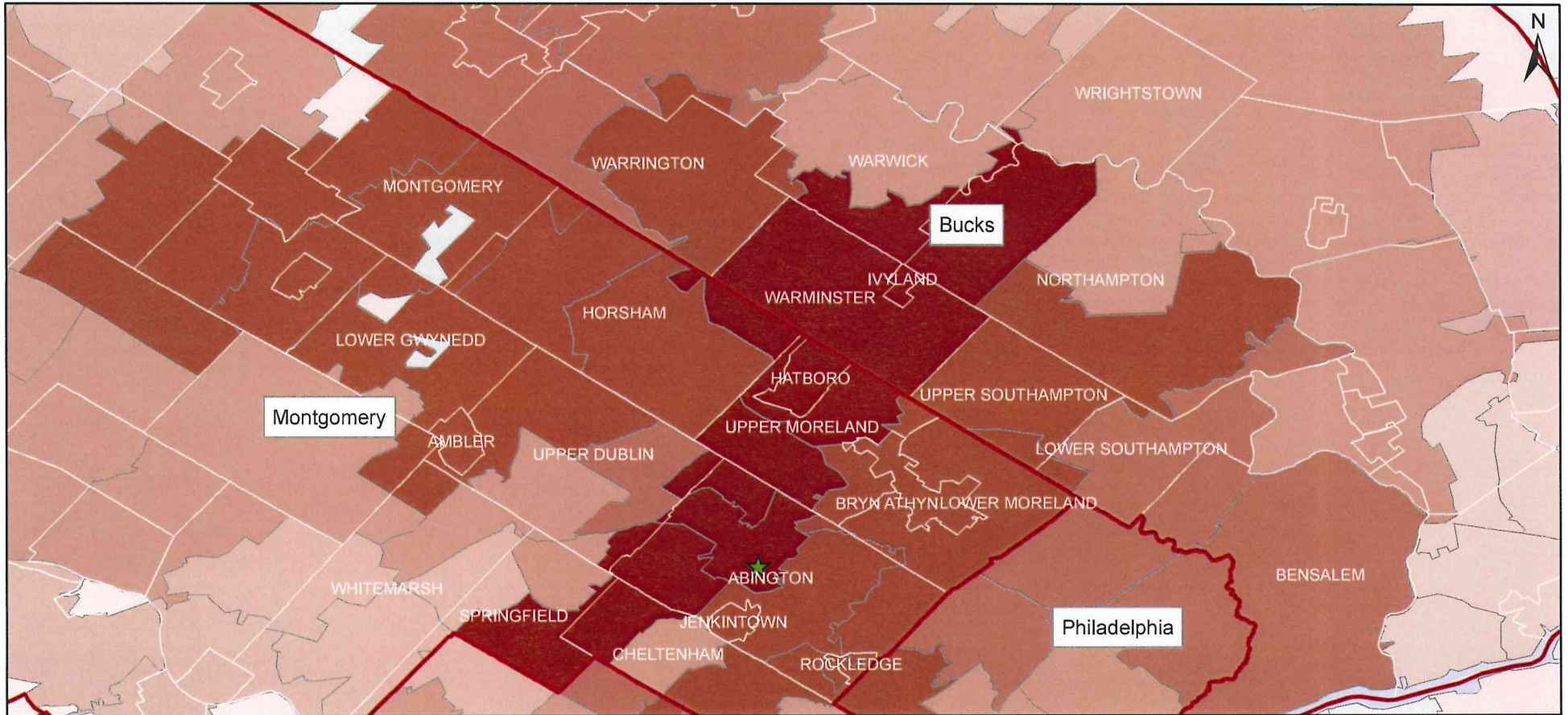
As shown in Figure 3.4, most of the hospital's employees reside in Montgomery and Bucks

Counties. The densest concentration of hospital employees is found relatively close to the hospital in narrow a narrow corridor about 4 miles wide and 16 miles long encompassing portions of Abington, Upper Moreland, and Springfield Townships and the Borough of Hatboro in Montgomery County and portions of Warminster and Northampton townships in Bucks County. Clearly, hospital employees make up a considerable portion of the demand for housing and retail goods and services in the study area, Abington Township, and southern Montgomery County.

The next largest industry was retail trade, making up 13 percent (2,220) of the entire workforce population. Professional, scientific and management jobs are also key contributors to the local economy, providing over 1,400 jobs and more than 8 percent of the total employment in the study area.

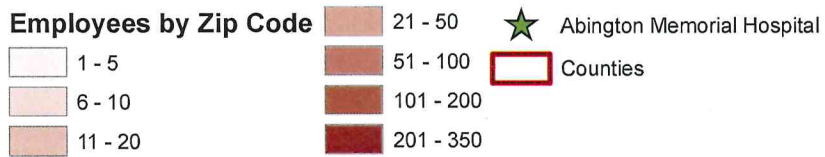
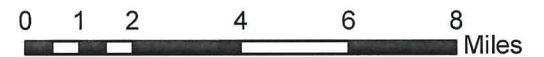
NAICS Sector	Number of Employees	Percent of all Employment
Agriculture, Forestry, Fishing and Hunting, and Mining	33	0.2%
Construction	695	4.1%
Manufacturing	414	2.4%
Wholesale Trade	350	2.0%
Retail Trade	2,220	13.0%
Transportation and Warehousing, and Utilities	262	1.5%
Information Industry	189	1.1%
Finance, Insurance, Real Estate and Rental and Leasing Industry	1,054	6.1%
Professional, scientific, management, administrative and waste management services	1,439	8.4%
Educational, Health and Social Services	8,234	48.0%
Arts, Entertainment, Recreation, Accommodation and Food Services	895	5.2%
Other services (except public administration)	925	5.4%
All Workers from Public Administration Industry	389	2.3%
Armed Forces	40	0.2%
Total Workers	17,139	100%
Sources: U.S. Census 2000, Reverse Journey To Work Data.		

Table 3.8 Study Area Employment by Industry



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-4: DISTRIBUTION OF ABINGTON MEMORIAL HOSPITAL EMPLOYMENT



HOUSING MARKET ANALYSIS

HOUSING INVENTORY

As shown in Table 3.9, Housing Units, the study area and Abington Township have experienced modest growth in the number of housing units since 1990. Currently the study area contains 18,247 housing units which is a 3.7 percent gain in 17 years. The township as a whole saw an even slower growth rate, just 2.1 percent since 1990, bringing the total number of housing units to 22,584. In contrast Montgomery County experienced a much more rapid increase in housing units from 1990 to 2007 (18.4 percent), even though the rate of growth in the county slowed between 2000 and 2007. This pattern mirrors its population growth rate during this seven year period, though the county's population grew at a slower rate than the number of housing units. Combined with a decreasing household size, the tendency for housing growth rate to outpace population growth may suggest an increase in the demand for smaller homes in both the study area and Montgomery County as a whole.

Single-family homes represent the majority of residential units in all areas in both 1990 and 2000, as shown in Table 3.10, Housing Unit Size. In 2000, the Abington Township had a noticeably higher percentage of single-family units (71.0 percent) compared to the study area (62.9 percent) and to county (56.0 percent). However, there was no growth within this category, suggesting that the increase in the

number of housing units was occurring in other housing types in the study area, township and county.

The data show that "Medium Scale Multi Family Buildings" containing three to nineteen units were not a preferred housing type, since the category declined as a percentage of total housing units in all three jurisdictions between 1990 and 2000. In contrast "Large Scale Multi Family Buildings" with 50 or more units experienced a moderate increase as a percentage of the total housing supply.

■ Tenure And Vacancy

Home ownership has historically been more prevalent in all three jurisdictions, as indicated in Table 3.11, Household Tenure. In fact home ownership rates increased in each of the areas between 2000 and 2007 to nearly 80 percent in the study area and the township, and to 74 percent in the county.

Overall, the percent of vacant units remained relatively low in all areas between 1990 and 2007. Table 3.12, Housing Vacancy, indicates that vacancy rates in the study area and the township was slightly higher than 3 percent since 1990. In the county the vacancy rate has stabilized at about 4 percent. Again, the increase in the number of housing units kept pace with the increase in the number of households, even though the rate of population growth slowed.

Although vacancy rates in all areas were relatively low, understanding exactly which types

	1990	2000	2007	Percent Change 1990-2000	% Change 2000-2007
Study Area	17,594	17,995	18,247	2.3%	1.4%
Abington Township	22,116	22,367	22,584	1.1%	1.0%
Montgomery County	265,856	297,434	314,842	11.9%	5.9%
Sources: U.S. Census 1990 and 2000; and ESRI Business Analyst, 2007.					

Table 3.9 Housing Units

of tend to be unoccupied can suggest why there is a gap between supply and demand of housing. Figure 3.5 shows the distribution of vacant units in 2000. While vacancy rates were similar among all three areas, there were slight differences in their composition. All jurisdictions contained

a high percentage of vacant rental units. For example, of a total 590 vacant units in the study area, rental units had the highest vacancy of any housing type, 45.3 percent or 267 units. Also notable is the percentage of vacant for sale units. The study area had the lowest percent

Trade Segment Area	Single-Family Home		Townhouses		Medium Scale Multi Family Building		Large Scale Multi Family Building		Other Mobile Homes, Rvs, etc.	
	1, detached		1 or 2 units		3 to 19 units		50 or more Units			
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Study Area	62.3%	62.9%	11.4%	11.5%	12.4%	11.3%	12.6%	14.2%	0.3%	0.1%
Abington Township	70.5%	71.0%	11.2%	11.6%	9.3%	8.4%	8.0%	9.0%	0.9%	0.1%
Montgomery County	55.5%	56.0%	20.9%	22.3%	12.3%	11.3%	9.3%	9.4%	2.0%	0.9%

Sources: U.S. Census 1990 and 2000.

Table 3.10 Housing Unit Size

Trade Area Segment	Owner-Occupied			Renter-Occupied		
	1990	2000	2007	1990	2000	2007
Study Area	72.8%	73.7%	79.6%	27.2%	26.3%	20.4%
Abington Township	78.5%	79.3%	79.6%	21.5%	20.7%	20.4%
Montgomery County	72.3%	73.5%	74.2%	27.7%	26.5%	25.8%

Sources: U.S. Census 2000; and ESRI Business Analyst, 2007.

Table 3.11 Housing Tenure

Trade Area Segment	Vacancy Rate		
	1990	2000	2007
Study Area	3.4%	3.3%	3.6%
Abington Township	2.6%	3.0%	3.3%
Montgomery County	4.1%	3.8%	4.1%

Sources: U.S. Census 1990, 2000; and ESRI Business Analyst, 2007

Table 3.12 Housing Vacancy

age of vacant for sale units (15.9 percent), while vacant for sale units in Abington Township and Montgomery County accounted for a higher proportion of all vacant units, 20.2 percent and 19.3 percent respectively.

SALES TRENDS

Housing Values

Housing values tend to be greater within the study area east of Old York Road, much the same as the trend in median household incomes. In general outside the study area housing values

tend to be higher to the north, again paralleling the distribution of household income (Figures 3.6 and 3.3).

Figure 3.7 illustrates the change in the median housing value from 2000 to 2007, as reported in Census 2000, which is based on respondents' self-evaluation of their housing value. The highest growth occurred in Montgomery County between 2000 and 2007, rising 55.6 percent from \$204,977 to \$318,887, accounting for the effects of inflation. In Abington, the value of owner-occupied homes increased by 54.1 percent during this same time from \$182,274 to \$280,841 in constant 2007 dollars. To a lesser

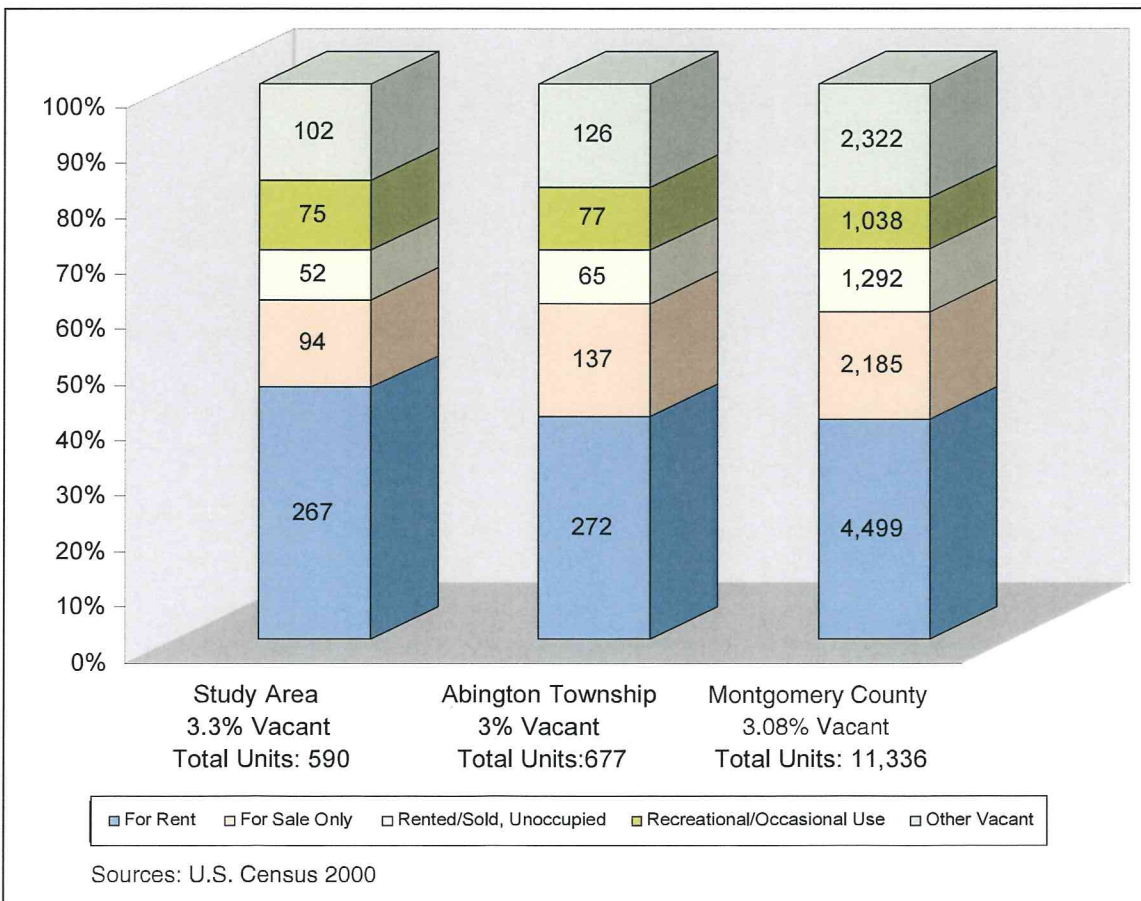
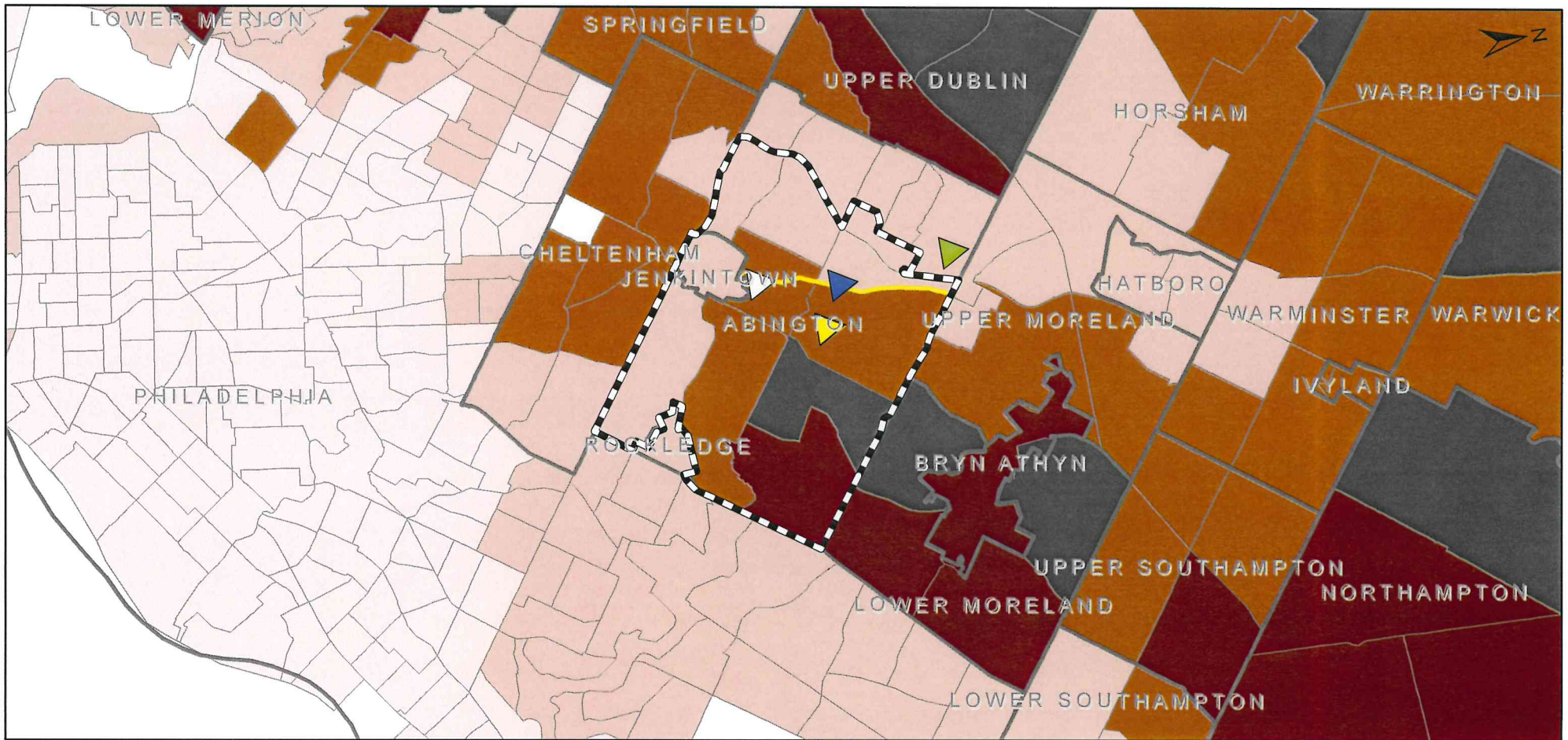
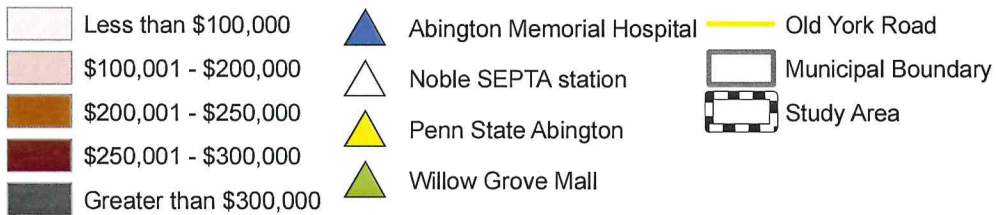


Figure 3.5 Distribution of Total Vacant Units, 2000



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-6: 1999 MEDIAN HOUSING VALUE (IN 2007 DOLLARS)



yet significant degree, median housing values increased in the study area to \$315,618 from \$208,882, or 51.1 percent from 2000 to 2007. The study area's median household value is comparable to Montgomery County as a whole, only showing a \$3,269 difference, demonstrating a strong, stable residential market.

The following sections discuss comparable single-family homes, multi-unit complexes and rentals are discussed as a means of assessing affordability, and gauging the competitive advantages or disadvantages of Abington's current housing stock and prices, as well as informing future residential development. Residential comparables were obtained from

apartment leasing agents and real estate websites for sales and rental information. Prices were gathered in several areas roughly within five miles of our Study Area.

- RENTALS

The study area reflected a variety of median contract rents in 1999 (Figure 3.8). These incomes ranged from \$500 to \$1350 dollars, as they did north of the study area. Moving south of Cheltenham towards Philadelphia, rents were much lower, not exceeding \$750. Contrary to median housing values, more expensive units were not concentrated east of Old York Road, rather they were scattered throughout the study area.

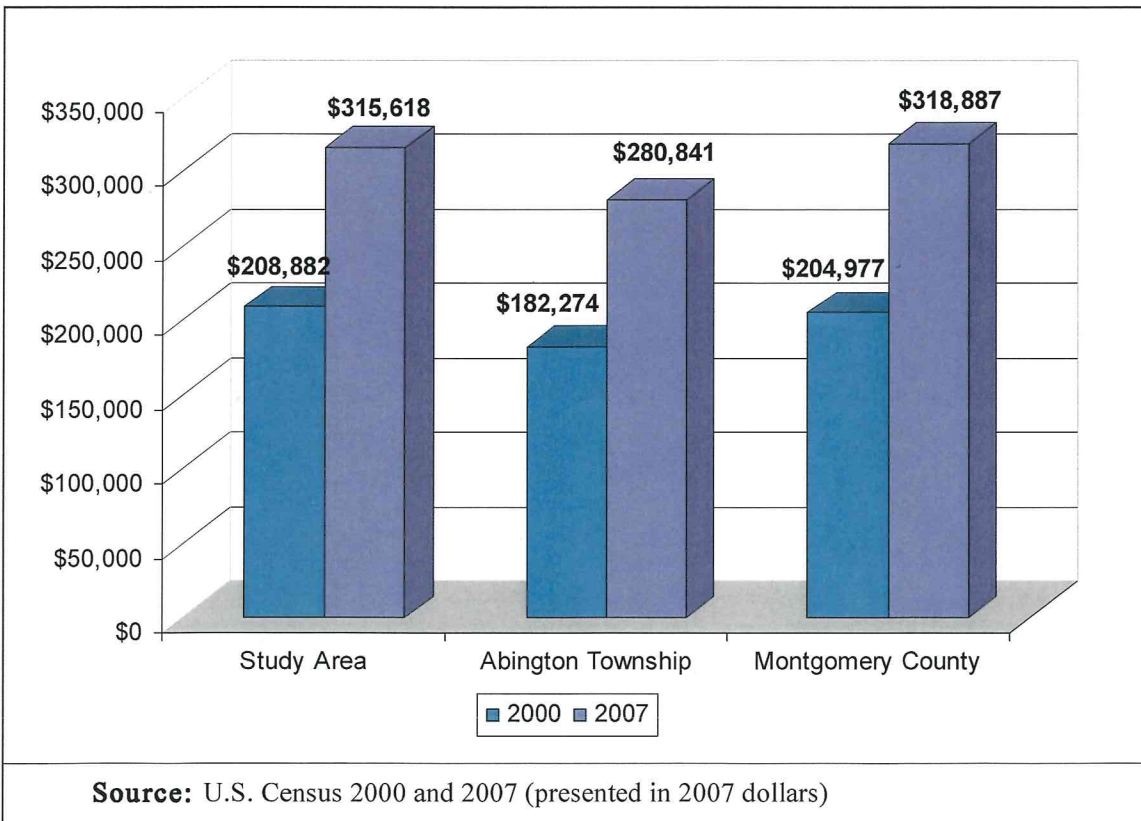
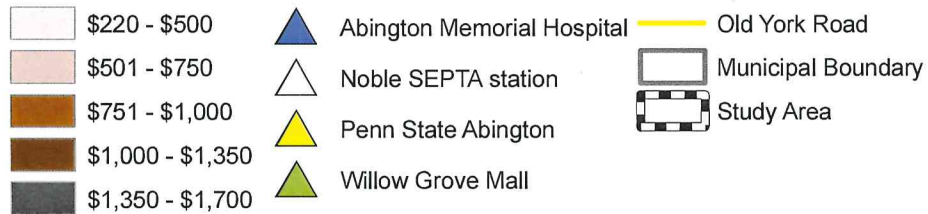


Figure 3.7 Median Housing Value: 2000 and 2007



Old York Road Corridor Improvement Study, Abington Township
FIGURE 3-8: 1999 MEDIAN CONTRACT RENT (IN 2007 DOLLARS)



Trade Segment Area	1990	2000	Percent Change from 1990 to 2000
Study Area	\$1,140	\$951	-16.6%
Abington Township	\$991	\$862	-13.1%
Montgomery County	\$672	\$868	29.2%

Sources: U.S. Census 1990 and 2000.

Table 3.13 Contract Rent (In 2007 Dollars)

As shown in Table 3.13, contract rents in the study area and the township declined substantially in terms of constant dollars between 1990 and 2000, contrary to rising home values. In contrast, contract rents in Montgomery County dramatically increased by 29.2 percent from 1990 to 2000. As mentioned above in the analysis of Housing Tenure, the study area experienced a decrease its rental stock of 1.2 percent between 1990 and 2000, dropping from 4,624 to 4,565 renter-occupied units. The decrease in rental units in Abington Township was even greater, declining by 3.4 percent from 4,640

to 4,489 units. This reduction in both rental prices and the number of rental units signals a decline in the demand for this type of housing during this ten year time frame.

A survey of selected rental units available in 2007 indicates that current asking rents are in the range of the median contract rents reported by Census 2000 (see Table 3.14). For example, rents in smaller, less stylish multifamily complexes such as the Edge Hill Apartments have asking rents that are approximately the same as median contract rents in the area. Larger more fashionable multifamily buildings such as the Colonnade have asking rents that are substantially higher than the median contract rents.

While the decline in median contract rent and the total number rental units in the study area indicates a lack of desirability to rent in the study area, interviews with local leasing agents may indicate otherwise. A representative from Jericho Manor stressed the high demand and low turnover rate for units within this complex.² It was one agent's testimony that units were usually 100 percent occupied, while prospective tenants were placed on a waiting list.

Regarding the source of demand, Jericho Manor's leasing agent described most of the inquiries as coming from local seniors that are too old to maintain a larger home and are looking to downsize. In addition, this individual claimed many renters are attracted



Edge Hill Apartments

	Maximum Monthly Rent	Square Feet	Monthly Rent Per Square Foot
Lynnewood Gardens			
1BR	\$935	647	\$1.45
2BR	\$1,035	810	\$1.28
3BR (Townhomes)	\$1,525	1,120	\$1.36
The Colonnade			
1BR	\$1,045	640	\$1.63
2BR	\$1,575	1,000	\$1.58
3BR	\$2020	1,300	\$1.00
Jericho Manor			
1BR	\$960	742	\$1.29
2BR	\$1,490	1,313	\$1.13
3BR (Townhomes)	\$1,810	1,698	\$1.07
Edge Hill Apartments			
1BR	\$770	700	\$1.10
2BR	\$895	850	\$1.05
Bradford Court Apartments			
1BR	\$810	600	\$1.35
2BR	\$910	810	\$1.12
Sources: Listings provided at www.rent.com ., October 2007.			

Table 3.14 Rentals in the Abington Area: 2007

to this complex's close proximity to Abington Memorial Hospital and the many "IT" office parks nearby.

As discussed and shown above in Table 3.10, the large majority of housing in all areas are single-family homes, with a growing number of units in large scale Multi Family Building complexes.

– **SINGLE-FAMILY HOMES**

Abington real estate agent Craig Lerch of Lerch and Associates indicated that the market for single-family homes in Abington was extremely steady.³ In an interview on October 16, 2007, Mr. Lerch claimed the

value of single-family homes are holding and not depreciating. Prospective buyers are mostly looking for single-family homes with a garage. Mr. Lerch also estimated that 25 percent of the buyers tend to be looking for a "resale" or "trade-up," while 15 to 20 percent are typically empty nesters. The remaining 50 to 60 percent are first-time home buyers looking to start a family or move out of Philadelphia. This real estate agent's testimony indicates a seemingly low turnover rate in Abington Township, which coincides with the area's extremely low vacancy rate.

As shown in Table 3.15, recently sold units listed with Century 21 in November 2007 indicated single-family home prices ranging

from \$177,000 to \$450,000. In order to assess which portion of the population is able to afford these homes, a further analysis of monthly mortgage payments was conducted. Assuming a down payment of 15 percent of the initial home sale price, mortgage payments were calculated on the basis of a thirty year loan with an interest rate of 7.5 percent. This scenario allowed us to calculate a minimum household income required to make debt service payments that would not exceed an amount equal to 35 percent of a household's annual pre-tax income (assuming that housing costs become a burden when they exceed 35 percent of a household's pre-tax income).⁴

Based on the sales prices listed above, a minimum household income of \$36,067 would be required to afford the monthly mortgage payment for the cheapest home (a five bedroom home sold at \$177,000); while the minimum household income required to afford the most expensive unit (a five bedroom home in Abington for \$450,000) would be \$91,697. According to the 2007 distribution of incomes in the study area, approximately 78.8 percent of the households would be able to afford the monthly mortgage payment for

the cheapest home listed above in Table 3.15 (i.e., those households earning \$40,000 or more) – assuming that these households had



The Colonnade

- 2 November 8, 2007. Interview with Jericho Manor Leasing Agent.
- 3 October 16, 2007. Interview with Craig Lerch of Lerch and Associates.
- 4 *Out of Balance: The Housing Crisis from a Regional Perspective*, Regional Plan Association and Citizens Housing and Planning Council, April 2004.

Number of Bedrooms	Selling Price
4	\$290,000
5	\$450,000
3	\$289,900
3	\$310,000
5	\$363,000
3	\$204,000
5	\$177,000
Notes: *Total homes sold in zip code 19001 listed on Century 21 website as of November 2007	
Sources: Century 21, November 2007.	

Table 3.15 Single-Family Home Sales in Abington Township: 2007 *

sufficient financial resources for the down payment. On the other hand, the most expensive unit listed in Table 3.15 would be affordable to about 36.8 percent of house holds in the study area (i.e., those households earning more than \$100,000). Thus, the single-family homes listed for sale in November 2007 in Abington were unaffordable to about 21 percent of the households living in the township.

– CONDOMINIUMS

Using a sample of 34 online listings within approximately five miles of the study area, there was again a wide variety of listing prices, as shown in Table 3.16. The cheapest unit, located in Elkins Park was advertised at \$69,000, and the most

expensive unit, located in Huntingdon was listed for \$365,000. Using the same methodology to assess the affordability of single-family homes, we are able to conclude that 95.6 percent of the study area's households are able to afford the monthly mortgage payment for the cheapest condominium unit, while 53.1 percent of households are able to afford the most expensive unit – again assuming that these households have sufficient financial resources for the down payment. Thus condominiums for sale in and near the study area appear to be affordable to a greater proportion of the study area households than single-family homes.

Though current listings suggest that a considerable portion of households in the

Town/Borough	Listing Price Range for 1-2 Bedroom Condominiums	Price Per Square Foot
Abington ¹	\$75,000-\$225,000	\$130-\$208
Elkins Park ²	\$69,900-\$219,900	\$199-\$207
Huntingdon ³	\$150,000-\$365,000	\$162-\$258
Cheltenham ⁴	\$70,000-\$126,500	\$151-\$167
Wyncote ⁵	\$75,000-\$111,900	\$109-\$94

Notes: 1> Sample of 10 listings; 2> Sample of 9 listings; 3>Sample of 6 listings; 4>Sample of 3 listings; 6>Sample of six listings.
Sources: Listings provided at www.trulia.com, November, 2007

Table 3.16 Listing Price for 1- to 2-Bedroom Condominiums

Housing Value	Study Area		Abington		Montgomery County	
<\$10,000 to \$199,000	1,192	9.0%	1,503	8.6%	30,496	13.6%
\$200,000 to \$399,999	8,581	65.8%	12,781	73.5%	154,211	68.9
\$400,000 to \$1,000,000+	3,257	25.0%	3,101	17.8%	39,35	17.5
Total	13,030	100%	17,385	100%	223,842	100%

Sources: ESRI Business Analyst, 2007

Table 3.17 Distribution of Housing Value: 2007

study area are able to afford single-family homes and condominiums in a variety of price ranges, analysis of the distribution of the actual housing stock indicates that there is a very small proportion of the inventory that would be available to lower income households (see Table 3.17). No more than 9 percent of the for-sale housing stock (1,192 units) would be affordable to households with incomes less than \$40,000, or about 25 percent of the households in the study area. These data suggest that the supply of lower priced for-sale units could be increased to meet demand from these lower income households. In the context of recent single-family home and condominium listings, it appears that 1-2 bedroom condominiums are the best type of housing product to meet the demand from lower income households. With the aging of the population in the study area, these types of units would also be attractive to seniors regardless of their income levels.

In general, demand for new housing in the study area is anticipated to be slow between 2010 and 2015, based on population projections for Abington Township. However, Montgomery County is expected to add approximately 20,600 residents between 2010 and 2015. If the township were to maintain its current percentage of the county's population, it could expect a population increase of nearly 1,100 people in this same period, equal to about 500 new households. Some of the county's population growth could be re-directed to the township and the study area if physical and economic conditions in the Old York Road corridor were improved. As expressed in interviews with key stakeholders, a portion of this growth could come from a number of sources, including an increase in medical personnel that would be associated with the potential development of new office space for Abington Memorial Hospital, from hospital employees seeking to live closer

to their jobs, especially those who need affordable housing, and from an anticipated increase in demand for off-campus housing by students at Penn State Abington.

RETAIL MARKET ANALYSIS

This section describes current retail market conditions in the Old York Road study area. Major retail concentrations on Old York Road and in the surrounding area are identified and described. Current retail sales in the trade area are analyzed, as well as the total expenditure potential of households likely to shop in the stores included in the analysis. The comparison of retail sales to retail expenditures provides a framework for identifying the demand for retail goods and services and the potential market opportunities within the trade area.

The retail market analysis focuses on the following three broad categories: shoppers goods stores, convenience goods stores, and eating and drinking establishments. Shoppers goods stores offer items such as furniture, clothing, electronics, and sports equipment – goods that people tend to make deliberate, planned trips to purchase, particularly to compare variety and selection of merchandise, quality and price. In general, people are more likely to comparison shop and travel longer distances to purchase shoppers goods. Convenience goods stores are those offering items such as groceries, personal care items, housekeeping products, prescription drugs, newspapers and magazines – goods that people tend to buy at the location most convenient to their homes. This section also evaluates auto-related sales and expenditures due to the concentration of auto dealerships in the trade area.

The results of this analysis will be used to inform and shape recommendations for future retail development, including strategic locations, the size, and the type of the retail mix.

DESCRIPTION OF TRADE AREA

A primary trade area for any shopping center or retail concentration refers to a geographic area from which the majority of the repeat sales are derived. Retailers typically expect to draw 70 to 80 percent of their regular or repeat customers from a primary trade area. Several factors are considered in delineating a reasonable trade area, including the size and mix of retail offerings in the trade area, the proximity of retail facilities that would compete directly with the retail facility or site under analysis, the road network and travel distance from residential concentrations, and physical barriers that may affect convenient access to the retail facility or site under analysis.

The trade area for this analysis is based on the type of stores located on Old York Road and the distances potential customers are typically willing

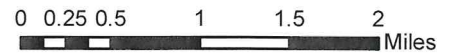
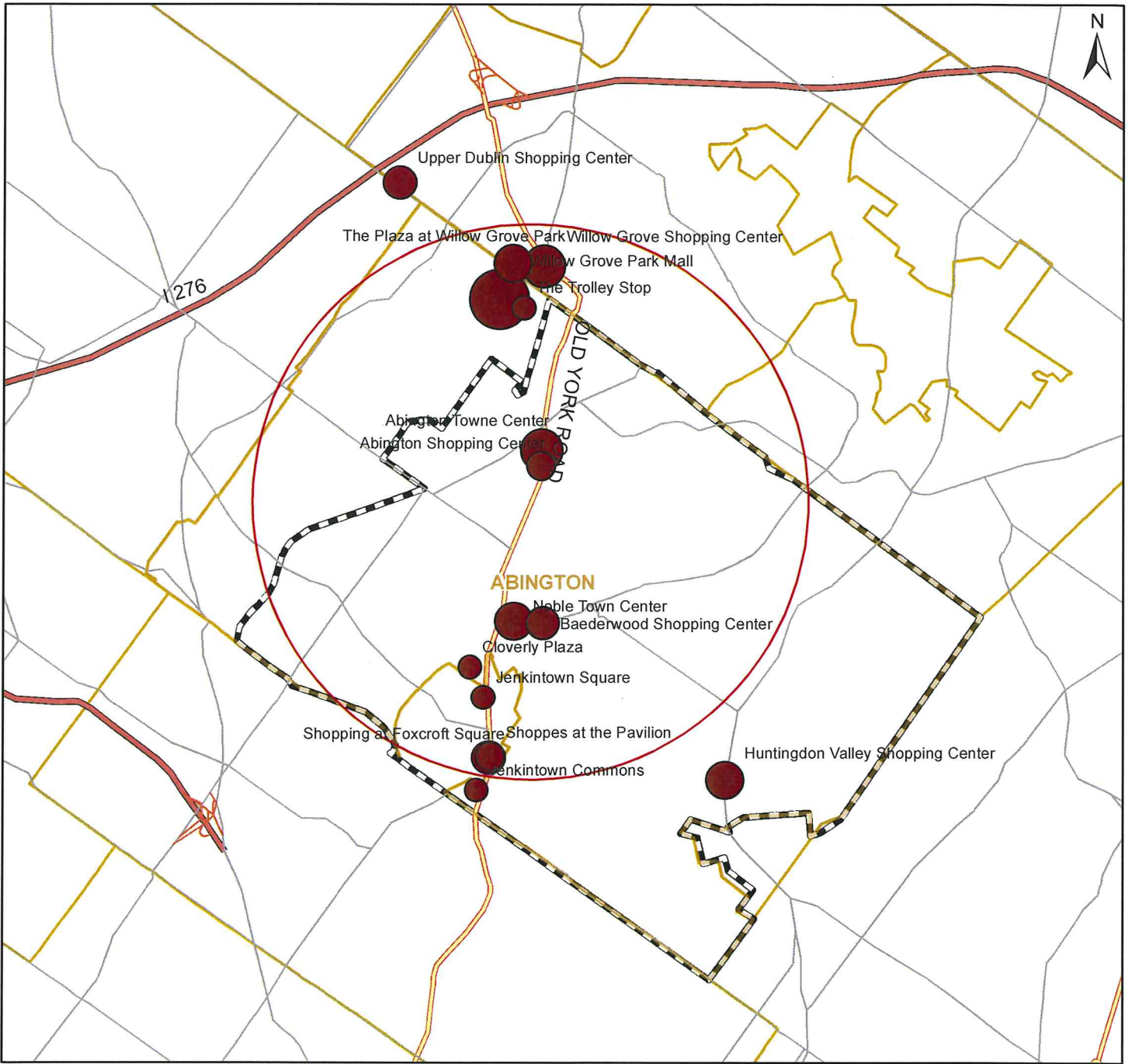
to travel to shop along the corridor. Figure 3.9 displays the major retail concentrations along Old York Road, as well as retail concentrations in Abington, Jenkintown, and Willow Grove.

As shown in Table 3.18, the major retail concentrations along Old York Road fall either within neighborhood or community shopping center retail categories. The Shopping Center Development Handbook, published by the Urban Land Institute, estimates that in order to reach a neighborhood and community center, customers typically travel between 5 and 10 minutes, which is equal to an approximate distance of 1.5 to 2 miles.

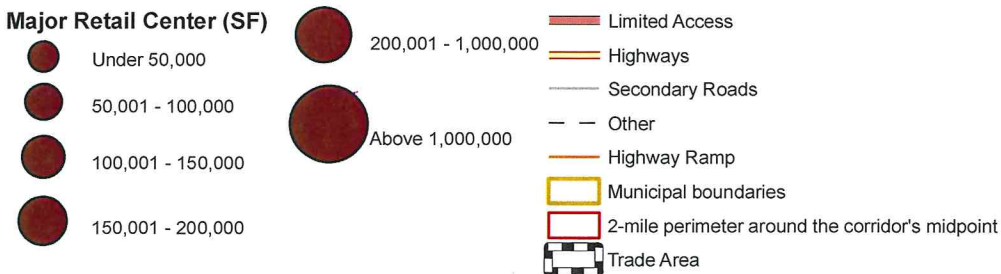
Figure 3.9 illustrates that while the trade area boundary generally follows a 1.5 to 2 mile radius, it is modified by the existing retail competition along Easton Road and shopping centers in

Name	Town/Borough	Type	GLA (including anchors)	Anchors
Abington Shopping Center	Abington	Neighborhood	74,000	Rite Aid, Giant
Abington Towne Center	Abington	Community	216,000	Target, TJ Maxx
Baederwood Shopping Center	Abington	Neighborhood	120,085 ¹	Whole Foods Market
Cloverly Plaza	Abington	Neighborhood	29,000	CVS
Huntington Valley Shopping Center	Abington	Community	198,000	Genuardi's Supermarket, Rite Aid
Jenkintown Commons	Jenkintown	Neighborhood	32,000	Pearl Vision
Jenkintown Square	Jenkintown	Neighborhood	29,000	
Noble Town Center	Abington	Community	165,000	Bed, Bath & Beyond, Walgreens, Old Navy Clothing
Shoppes at the Pavilion	Jenkintown	Community	150,000	Acme Supermarket
Shopping at Foxcroft Square	Jenkintown	Community	78,000	Eckerd Drugstore
Notes: 1. Montgomery County Property Records Database				
Sources: Shopping Center Directory, 2006; Times Chronicle Glenside News, August, 2007				

Table 3.18 Retail Concentrations in the Primary Trade Area



Old York Road Corridor Improvement Study, Abington Township
FIGURE 3-9: MAJOR RETAIL CENTERS



Willow Grove, including the Willow Grove Park Mall and the Willow Grove Plaza. Based on the considerations above, the trade area for retail stores along Old York Road extends from East Moreland Road and the Abington Township boundary in the north to Township Line Road and the Abington Township boundary in the south. The eastern boundary of the trade area is formed by the Montgomery County border with Philadelphia County and Abington Township's border with Rockledge Borough. The western boundary of the trade area roughly consists of Tyson Avenue, Roslyn Road and Easton Road. It includes Census Tracts 2015.01, 2015.02, 2016.06, 2016.07, 2016.08, 2017.05, 2017.06, 2018.00, 2019.01, 2019.02, and 2021.00.

■ Review Of Demographics

As discussed in Section B, Demographic Characteristics, the population in the trade area is currently 43,313, which was less than a one percent increase from the population in 2000 (43,056). The number of households in the trade area remained relatively constant during this time period with 17,379 households in 2000 and 17,596 households in 2007. According to ESRI estimates, the 2007 median household income is \$78,394. Over half of the households in the trade area (53.1 percent) have incomes above \$75,000. Nearly a third of the households (32.5 percent) have incomes between \$30,000 and \$74,999. Only 14.7 percent of the trade area households have incomes below \$30,000.

■ Additional Retail Demand

Retail expenditures by office workers in the trade area have the potential to further support local retailers. A survey by the International Council of Shopping Centers that was published in 2004 reported that office workers in suburban areas spend \$3,290 per year at retail stores closer to the office. The majority of these dollars are spent on shoppers and convenience goods (\$2,066), followed by lunches at \$1,080. Only \$144 was estimated to be spent annually for dinner/drinks close to the office.⁵

As shown in Table 3.8, there were approximately 17,139 workers in the trade area according to Census 2000 Reverse Journey to Work data. Based on the ICSC data presented above, these workers could potentially spend an estimated \$56 million at retail stores in the trade area, of which \$35 million would be spent on shoppers and convenience goods, \$19 million on lunches, and \$2 million spent on dinner/drinks near the office.

DESCRIPTION OF MAJOR RETAIL USES

The following section examines retail market conditions and trends on Old York Road in Abington and its vicinity. In the fall of 2007, AKRF, Inc. conducted field surveys of commercial businesses within the trade area. These surveys revealed that there are approximately 280 stores on Old York Road between Cloverly Avenue and East Moreland Road and on The Fairway (see Table 3.19). Several large national retailers line Old York Road, particularly at the southern end of the corridor. A 157,616-square foot Target anchors the Abington Towne Center. There is also a



Abington Towne Center

⁵ International Council of Shopping Centers, Office Worker Retail Spending Patterns, (New York: ICSC, 2004) 105-106.

Table 3.19 Retail Survey
 – Old York Road between East Moreland Road and Cloverly and The Fairway

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
SHOPPING GOODS	33	11.9%	CONVENIENCE GOODS	16	5.7%
General Merchandise	3		Food and Beverage	8	
Department (except discount)			Supermarkets and other grocery	3	
Discount department	3		Convenience stores	1	
Warehouse clubs and supercenters			Meat markets	1	
All other general merchandise			Fish and seafood markets		
Clothing and Clothing Accessories	15		Fruit and vegetable markets		
Men's clothing			Other specialty food stores	1	
Women's clothing	4		Beer, wine, and liquor stores	2	
Children's clothing	0		Health and Personal Care	6	
Family clothing	2		Pharmacies and drug stores	4	
Accessories			Beauty supplies and perfume	1	
Other clothing	2		Other health and personal care	1	
Shoes	4		Other Convenience Goods	2	
Jewelry	2		Florists	1	
Luggage and leather goods	1		Tobacco stores		
Furniture, Home Furnishings, Equipment	4		Newsdealers and newsstands		
Furniture	2		Pet and pet supplies stores	1	
Floor covering			Other miscellaneous convenience goods		
Window treatment			NEIGHBORHOOD SERVICES	155	55.6%
All other home furnishings	2		Taxi and limousine services		
Electronics and Appliance	7		Banks	11	
Appliance, television, and other electronics	3		Check cashing		
Computer and software	4		Pawn shops		
Camera and photographic supplies			Video tape and disc rentals	1	
Sporting Goods, Hobby, Books, Music	1		Photocopy stores		
Sporting goods			Fitness and recreational sports centers	5	
Hobby, toy, and games			Electronics repair (computer, stereo, etc.)		
Sewing, needlework, and piece			Personal & household goods repair (appliance, garden equipment, footwear, etc.)	3	
Musical instrument and supplies			Hair, nail, and skin services	10	
Books	1		Funeral homes and funeral services	3	
Tape, compact disc, and record			Laundromats		
Miscellaneous Store Retailers	3		Drycleaning and laundry services	5	
Optical goods			Photofinishing	1	
Office supplies and stationary			Parking lots and garages	2	
Gift, novelty, and souvenir	3		Medical or dental offices	57	
Used merchandise			All other professional offices (travel, tax, etc.)	45	
Art dealers			Other neighborhood services (palm reading, etc.)	12	
Other miscellaneous shopping goods			EATING AND DRINKING PLACES	23	8.2%
BLDING MTR'LS & GARDEN SUPPLY	4	1.4%	Full-service restaurants	8	
Home centers	3		Limited-service eating places	13	
Paint and wallpaper			Special food services (e.g., caterers)		
Hardware	1		Drinking places (alcoholic beverages)	2	
Other building material dealers			AUTO-RELATED TRADE	19	6.8%
Lawn and garden equipment & supplies			Automobile dealers	8	
VACANT STOREFRONTS	29	10.4%	Other motor vehicle dealers (motorcycle, boat, etc)		
Boarded-up			Automotive parts, accessories, and tires	2	
Under renovation, no tenant specified	28		Gasoline stations	4	
Under renovation, future tenant specified	1		Car rental		
			Automotive repair and maintenance	5	
STOREFRONT SUMMARY					
Total Storefronts	279	100.0%	Neighborhood Services	155	55.6%
Shopping Goods	33	11.8%	Eating and Drinking Places	23	8.2%
Blding Mtr'ls & Garden Supply	4	1.4%	Auto-Related Trade	19	6.8%
Convenience Goods	16	5.7%	Vacant Storefronts	29	10.4%

Source: AKRF, Inc. field surveys conducted in November 2007.

27,000-square foot TJ Maxx at this shopping center. Another discount shoppers goods retailer, SteinMart, is on the corridor in the Noble Town Center at 913 Old York Road. In addition to national discount department stores, there are two prominent upscale grocery stores: Trader Joe's and Whole Foods. Other national retailers include Bed Bath and Beyond, Old Navy Clothing Center, and PetSmart at the Noble Town Center. There is also a Barnes & Noble at 835 Old York Road.

Overall, the majority of the retail mix in the primary trade area is neighborhood services (56 percent). Professional, medical, or dental offices are common throughout the trade area, representing about 37 percent of all storefronts. This includes offices in larger buildings such as Noble Plaza and Levy Medical Plaza, as well low-rise buildings with single tenants. Other neighborhood services include 11 banks, 10 hair, nail, and skin services, and 5 fitness and recreational centers (see Table 3.19 for a complete list of store types).

There are 33 shoppers goods in the trade area, representing 12 percent of all retail stores. Over half of these stores are clothing and accessory

stores such as Old Navy, Chico's, Payless, and Fred H. Straub Jeweler. In addition, there are three discount department stores (Target, TJ Maxx, and SteinMart), and four furniture stores including Jennifer Convertibles and Raymore and Flannigan.

Approximately 8 percent of stores in the trade area are eating and drinking places. Limited-service eating places are more common, making up about 57 percent of all eating and drinking establishments. About a third of the eating and drinking places are full-service restaurants, such as Kitchen Bar and Houlihan's.

Auto-related retailers are clustered at the southern end of the Old York Road and on The Fairway. These retailers make up 7 percent of the storefronts in the trade area. These include Sussman Acura, Eckenhoff dealership, and a Saturn dealership.

COMPETING RETAIL CONCENTRATIONS

The types of retailers in the vicinity of the Old York Road commercial corridor varies from shops along main street (i.e. Easton Road, downtown Jenkintown, and Keswick Village) to the large retail concentration in Willow Grove which is just north of the trade area and is one of Montgomery County's four major regional shopping cores.⁶ As shown in Table 3.20, there are five retail centers in Willow Grove with approximately 1.7 million square feet of retail space.

■ Willow Grove Park Mall

Making up approximately 70 percent of the Willow Grove retail market, the Willow Grove

⁶ According to Montgomery County's 2005 Economic Development Plan, Montgomery County's four major regional shopping cores are King of Prussia, Plymouth Meeting, Montgomeryville, and Willow Grove.



Auto dealership in the trade area

Park Mall is a 1.2 million square foot super-regional mall that opened in 1982. This 3-story mall has over 120 stores and is anchored by Bloomingdale's, Macy's, and Sears. In addition, Boscov's Department Store will be opening in spring 2008. Willow Grove Park Mall targets upscale and upper middle income residents with retailers such as Abercrombie & Fitch, Coach, Williams-Sonoma, Ann Taylor, and J. Crew. Approximately 65 percent of the stores are shopping goods. About 13 percent of the stores are eating and drinking places, of which there are three full service restaurants (Cheesecake Factory, TGI Fridays, and Ruby Tuesday's). Only 8 percent of the stores sell convenience goods. 10 percent of the stores are vacant (see Table 3.21).



Willow Grove Plaza

Name	Address	Type	GLA (including anchors)	Anchors
The Plaza at Willow Grove Park	2525 Moreland Road	Community	193,000	Circuit City, Dick's Sporting Goods
The Trolley Stop	1865 Easton Road	Neighborhood	28,000	
Upper Dublin Shopping Center	3610 Welsh Road	Community	103,000	Super Fresh Supermarket
Willow Grove Park Mall	2500 Moreland Road	Super Regional	1,206,000	Macy's, Bloomingdale's, Boscov's, Sears
Willow Grove Shopping Center	102 Park Avenue	Community	215,000	Barnes & Noble, Marshalls, Modell's, Office Depot, Toys R Us, Ulta Cosmetics

Sources: Shopping Center Directory, 2006

Table 3.20 Retail Concentrations in Willow Grove

CHAPTER 3

Table 3.21 Retail Survey
– Willow Grove Park Mall

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
SHOPPING GOODS	81	64.8%	CONVENIENCE GOODS	10	8.0%
General Merchandise	4		Food and Beverage	5	
Department (except discount)	4		Supermarkets and other grocery		
Discount department			Convenience stores		
Warehouse clubs and supercenters			Meat markets		
All other general merchandise			Fish and seafood markets		
Clothing and Clothing Accessories	50		Fruit and vegetable markets		
Men's clothing	2		Other specialty food stores	5	
Women's clothing	13		Beer, wine, and liquor stores		
Children's clothing	5		Health and Personal Care	5	
Family clothing	12		Pharmacies and drug stores		
Accessories	1		Beauty supplies and perfume	4	
Other clothing			Other health and personal care	1	
Shoes	7		Other Convenience Goods	0	
Jewelry	9		Florists		
Luggage and leather goods	1		Tobacco stores		
Furniture, Home Furnishings, Equipment	2		Newsdealers and newsstands		
Furniture	1		Pet and pet supplies stores		
Floor covering			Other miscellaneous convenience goods		
Window treatment			NEIGHBORHOOD SERVICES	5	4.0%
All other home furnishings	1		Taxi and limousine services		
Electronics and Appliance	7		Banks		
Appliance, television, and other electronics	4		Check cashing		
Computer and software	2		Pawn shops		
Camera and photographic supplies	1		Video tape and disc rentals		
Sporting Goods, Hobby, Books, Music	7		Photocopy stores		
Sporting goods	4		Fitness and recreational sports centers		
Hobby, toy, and games	1		Electronics repair (computer, stereo, etc.)		
Sewing, needlework, and piece			Personal & household goods repair (appliance, garden equipment, footwear, etc.)		
Musical instrument and supplies			Hair, nail, and skin services	3	
Books	1		Funeral homes and funeral services		
Tape, compact disc, and record	1		Laundromats		
Miscellaneous Store Retailers	11		Drycleaning and laundry services		
Optical goods	2		Photofinishing		
Office supplies and stationary	1		Parking lots and garages		
Gift, novelty, and souvenir	5		Medical or dental offices		
Used merchandise			All other professional offices (travel, tax, etc.)	1	
Art dealers	1		Other neighborhood services (palm reading, etc.)	1	
Other miscellaneous shopping goods	2		EATING AND DRINKING PLACES	16	12.8%
BLDING MTR'LS & GARDEN SUPPLY	0	0.0%	Full-service restaurants	3	
Home centers			Limited-service eating places	13	
Paint and wallpaper			Special food services (e.g., caterers)		
Hardware			Drinking places (alcoholic beverages)		
Other building material dealers			AUTO-RELATED TRADE	0	0.0%
Lawn and garden equipment & supplies			Automobile dealers		
VACANT STOREFRONTS	13	10.4%	Other motor vehicle dealers (motorcycle, boat, etc)		
Boarded-up	13		Automotive parts, accessories, and tires		
Under renovation, no tenant specified			Gasoline stations		
Under renovation, future tenant specified			Car rental		
			Automotive repair and maintenance		
STOREFRONT SUMMARY					
Total Storefronts	125	100.0%	Neighborhood Services	5	4.0%
Shopping Goods	81	64.8%	Eating and Drinking Places	16	12.8%
Blding Mtr'ls & Garden Supply	0	0.0%	Auto-Related Trade	0	0.0%
Convenience Goods	10	8.0%	Vacant Storefronts	13	10.4%
Source: http://www.willowgroveparkmall.com					

■ Downtown Jenkintown

Downtown Jenkintown is a pedestrian-friendly shopping area located south of the study area. The area's wide sidewalks, gazebo, benches, trees, and decorative lampposts create an inviting shopping environment. This walkable retail core has a unique shopping environment. Most of these establishments are small businesses with attractive storefronts, and offer shoppers goods stores (Berta Sawyer clothing store), full-service restaurants (La Pergola Restaurant and West Ave Grill), and neighborhood services (Spa Viva and Eric's Cleaners). A focal point is Jenkintown Town Square, which provides communal space for local events and gatherings.



Jenkintown Town Square

■ Easton Road

Just west of the Old York Road corridor is Easton Road, a prominent retail concentration in the trade area. For this analysis, we identified retail establishments on Easton Road from Mt. Carmel Avenue in the south to Old Welsh Road in the north. Unlike Jenkintown and Keswick Village (see below), this retail corridor is auto-driven with on-site parking for patrons. Toward the southern end of Easton Road, there are smaller, more contiguous stretches of retail, while near the Willow Grove Park Mall businesses are larger and are more dispersed.

Similar to Old York Road, much of Easton Road's establishments are neighborhood services, which account for approximately 40 percent of all storefronts. Some of these include medical, dental and real estate offices. The second highest concentration of retail is in the automobile related services sector (roughly 17 percent), more specifically offering automotive repair and maintenance (see Table 3.22).



Retail on Easton Road

CHAPTER 3

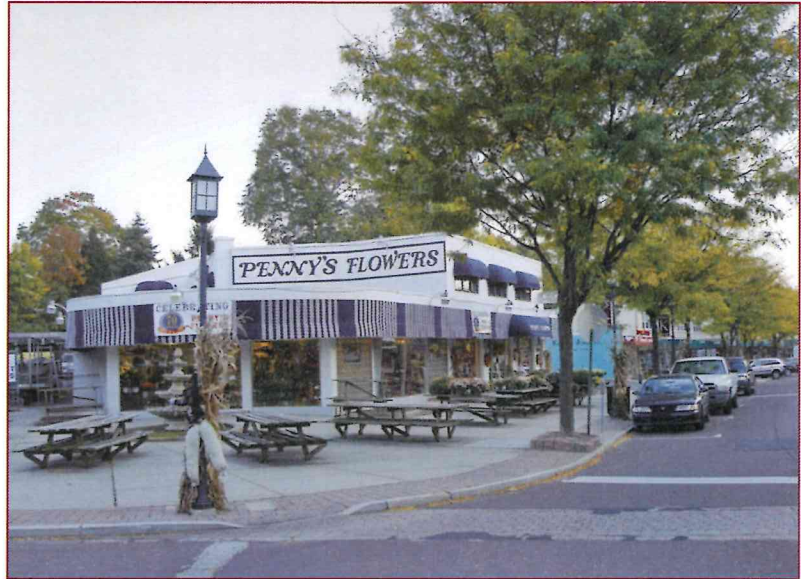
Table 3.22 Retail Survey
– Easton Road between Old Welsh Road and Mt. Carmel Avenue

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
SHOPPING GOODS	24	15.9%	CONVENIENCE GOODS	15	9.9%
General Merchandise	0		Food and Beverage	11	
Department (except discount)			Supermarkets and other grocery	1	
Discount department			Convenience stores	4	
Warehouse clubs and supercenters			Meat markets		
All other general merchandise			Fish and seafood markets		
Clothing and Clothing Accessories	3		Fruit and vegetable markets	1	
Men's clothing			Other specialty food stores		
Women's clothing	1		Beer, wine, and liquor stores	5	
Children's clothing	1		Health and Personal Care	1	
Family clothing			Pharmacies and drug stores	1	
Accessories			Beauty supplies and perfume		
Other clothing			Other health and personal care		
Shoes			Other Convenience Goods	3	
Jewelry	1		Florists	3	
Luggage and leather goods			Tobacco stores		
Furniture, Home Furnishings, Equipment	4		Newsdealers and newsstands		
Furniture			Pet and pet supplies stores		
Floor covering	2		Other miscellaneous convenience goods		
Window treatment	2		NEIGHBORHOOD SERVICES	60	39.7%
All other home furnishings			Taxi and limousine services		
Electronics and Appliance	6		Banks	2	
Appliance, television, and other electronics	6		Check cashing	1	
Computer and software			Pawn shops		
Camera and photographic supplies			Video tape and disc rentals		
Sporting Goods, Hobby, Books, Music	5		Photocopy stores		
Sporting goods	2		Fitness and recreational sports centers	5	
Hobby, toy, and games	2		Electronics repair (computer, stereo, etc.)		
Sewing, needlework, and piece	1		Personal & household goods repair (appliance, garden equipment, footwear, etc.)		
Musical instrument and supplies			Hair, nail, and skin services	10	
Books			Funeral homes and funeral services	3	
Tape, compact disc, and record			Laundromats		
Miscellaneous Store Retailers	6		Drycleaning and laundry services	2	
Optical goods			Photofinishing		
Office supplies and stationary			Parking lots and garages		
Gift, novelty, and souvenir	5		Medical or dental offices	11	
Used merchandise			All other professional offices (travel, tax, etc.)	20	
Art dealers			Other neighborhood services (palm reading, etc.)	6	
Other miscellaneous shopping goods	1		EATING AND DRINKING PLACES	20	13.2%
BLDING MTR'LS & GARDEN SUPPLY	4	2.6%	Full-service restaurants	4	
Home centers	1		Limited-service eating places	15	
Paint and wallpaper			Special food services (e.g., caterers)		
Hardware	1		Drinking places (alcoholic beverages)	1	
Other building material dealers	2		AUTO-RELATED TRADE	26	17.2%
Lawn and garden equipment & supplies			Automobile dealers	4	
VACANT STOREFRONTS	2	1.3%	Other motor vehicle dealers (motorcycle, boat, etc)		
Boarded-up	2		Automotive parts, accessories, and tires	3	
Under renovation, no tenant specified			Gasoline stations	5	
Under renovation, future tenant specified			Car rental		
			Automotive repair and maintenance	14	
STOREFRONT SUMMARY					
Total Storefronts	151	100.0%	Neighborhood Services	60	39.7%
Shopping Goods	24	15.9%	Eating and Drinking Places	20	13.2%
Blding Mtr'ls & Garden Supply	4	2.6%	Auto-Related Trade	26	17.2%
Convenience Goods	15	9.9%	Vacant Storefronts	2	1.3%

Source: AKRF, Inc. field surveys conducted in November 2007.

■ Keswick Village

Keswick Village is a small retail concentration in Glenside, approximately 2 miles from the southern tip of the trade area. It is a pedestrian-friendly environment, with wide sidewalks, lampposts, and street benches. Also, the area is visually attractive with street trees and landscaping. This retail concentration includes sit-down restaurants (Athena Restaurant and The Village Diner) and limited service eating places (Primo Hoagies), convenience goods stores (O'Neill's Food Market and Penny's Flowers), and shoppers goods (Bittersweet Village, The Irish Shop, and The Toy Shop). A key landmark is Keswick Theater, a venue that hosts approximately three dozen shows annually as well as a destination for community events with dance recitals, graduations, and other functions.



Keswick Village

CAPTURE RATE ANALYSIS

Capture rates are measures of business activity in a retail trade area, indicating the percentage of consumer expenditures for retail goods that are being “captured” by retailers in the trade area, expressed as sales. As described above, a primary retail trade area typically generates 70 to 80 percent of the sales in a shopping center or major retail concentration. If the total sales in the trade area are much lower than the area’s expenditure potential, then residents are spending a large portion of their available dollars outside of the trade area, and the capture rate is low. If sales are closer in value to expenditure potential, then area residents are likely spending a higher portion of their available resources within the trade area, and the capture rate is high.

Capture rates are also affected by sales flowing into an area from people who are not residents, such as employees or visitors. For instance, some of the sales in the Old York Road trade area are likely coming from commuters using the Noble SEPTA station, local employees, or

those visiting the Abington Memorial Hospital or Penn State campus. It is not possible to know exactly who is spending money in the trade area. However, despite these uncertainties about the origin of sales, comparing expenditure and sales data provides a good indication of the strength of the retail mix and how much of a trade area’s household expenditure potential is being captured by trade area retailers. Capture rates for the Old York Road retail trade area are presented in Table 3.23.

As shown in Table 3.23, convenience goods stores are capturing 150 percent of the household expenditure potential in the trade area. This high capture rate suggests that convenience goods stores are likely capturing a high percentage of available expenditure potential, plus additional spending from people who live outside of the trade area. This level of spending in the primary retail trade area is likely due to the presence of Whole Foods and Trader Joe’s, national gourmet grocery chains, as well as local favorites such as Abington Pharmacy, Walgreens, and PetSmart.

Retail Store Categories	Demand (Retail Potential) ¹	Supply (Retail Sales) ¹	Capture Rate
Shoppers Goods ²	\$171.2	\$118.9	69%
Convenience Goods ³	\$172.3	\$258.6	150%
Eating and Drinking Places	\$102.7	\$44.6	43%
Automobile Dealers	\$148.1	\$367.7	248%

Notes: ¹ All values are in millions of dollars.
² Shoppers' goods include the following retail sub-categories: Furniture and Home Furnishings Stores; Electronics and Appliances Stores; Clothing and Accessories Stores; Sporting Goods, Hobby, Book, and Music Stores; General Merchandise Stores; Office Supply, Stationery, and Gift Stores; and Used Merchandise Stores.
³ Convenience goods include the following retail sub-categories: Food and Beverage Stores; Health and Personal Care Stores; Florists; and Other Miscellaneous Store Retailers.

Sources: ESRI Business Analyst (2006) and AKRF, Inc.

Table 3.23 Estimated Capture Rates for Retail Stores in Trade Area

In addition, there are several pharmacies and drug stores in the corridor which likely contribute to the high capture rate for convenience goods.

The capture rate for shoppers goods (such as Target, TJ Maxx, Bed Bath and Beyond, Barnes and Noble, and Jennifer Convertibles) is approximately 69 percent, which indicates that the shoppers goods retailers are meeting demand in the trade area.⁷

However, eating and drinking places have a capture rate of approximately 43 percent, indicating that Old York Road is capturing a small portion of the market for dining outside the home. The capture rate for eating and drinking places is particularly low, considering that the Old York Road corridor is a major employment center. The trade area contains 23 eating and drinking establishments, of which the majority (57%) is limited service eating places such as Baja Fresh Mexican Grill and Boston Market. Only a third of the eating and drinking places are full-service. These include Kitchen Bar and Houlihan's. There are also two drinking places on the corridor, including Wing Walker Pub and Romeo's Bar.

There are several automobile dealers on the corridor, including: Acura, Chrysler, Jeep, and Saturn. According to ESRI, Inc. estimates,

the capture rate for automobile dealers is 248 percent with sales at \$367.7 million and demand at \$148.1 million. Thus, car sales are coming from both residents and from people outside of the trade area.

■ Evaluation Of Demand

As discussed above, there are several convenience goods retailers in the trade area. The capture rate analysis reflects the presence of these stores with a capture rate of 150 percent. In addition, auto dealerships are common in the study area, with a capture rate of 248 percent. Based on these capture rates, it seems likely that sales at convenience goods retailers are supported by residents living inside and outside the trade area, and that automobile dealerships are clearly attracting a majority of their sales from people who do not live in the study area.

⁷ Although ESRI, Inc. confirmed that Target sales are included in the general merchandise stores sales, it seems likely that shoppers goods sales could be higher than reported. If this is the case, the capture rate for shoppers goods stores could be higher than reported in Table 3.23.

The analysis also found that the capture rate for shoppers goods in the trade area is 69 percent. Also, as displayed in Table 3.19, there are approximately 23 eating and drinking establishments in the trade area, representing 8 percent of the retail storefronts. The low supply of sit-down and fast food restaurants is reflected in the 43 percent capture rate.

Based on the capture rate analysis, it appears as though there is room to expand the restaurant and shoppers goods inventory in the trade area. This finding is further strengthened by discussions during focus groups and interviews with stakeholders. During these conversations, residents in the trade area indicated a desire for more sit-down restaurants in the trade area and a wider selection of shoppers goods merchandise. In addition, they would like to see the introduction of smaller retailers similar to those in Downtown Jenkintown.

OFFICE MARKET ANALYSIS

OFFICE MARKET TRENDS

The CoStar Office Report Third Quarter 2007 provides an analysis of the office market in Philadelphia at the county level and at the submarket level. The Horsham/Willow Grove submarket (“the study area”) includes Old York Road in Abington and will be compared to Suburban Philadelphia for this analysis.⁸ As shown in Figure 3.10, the study area is bounded by Route 152 on the west, West Cheltenham Avenue on the south, the municipal boundaries of Cheltenham, Abington, Rockledge, and Lower Moreland on the east, and the municipal boundaries of Lower Moreland, Upper Moreland, Hatboro, and Horsham on the north.

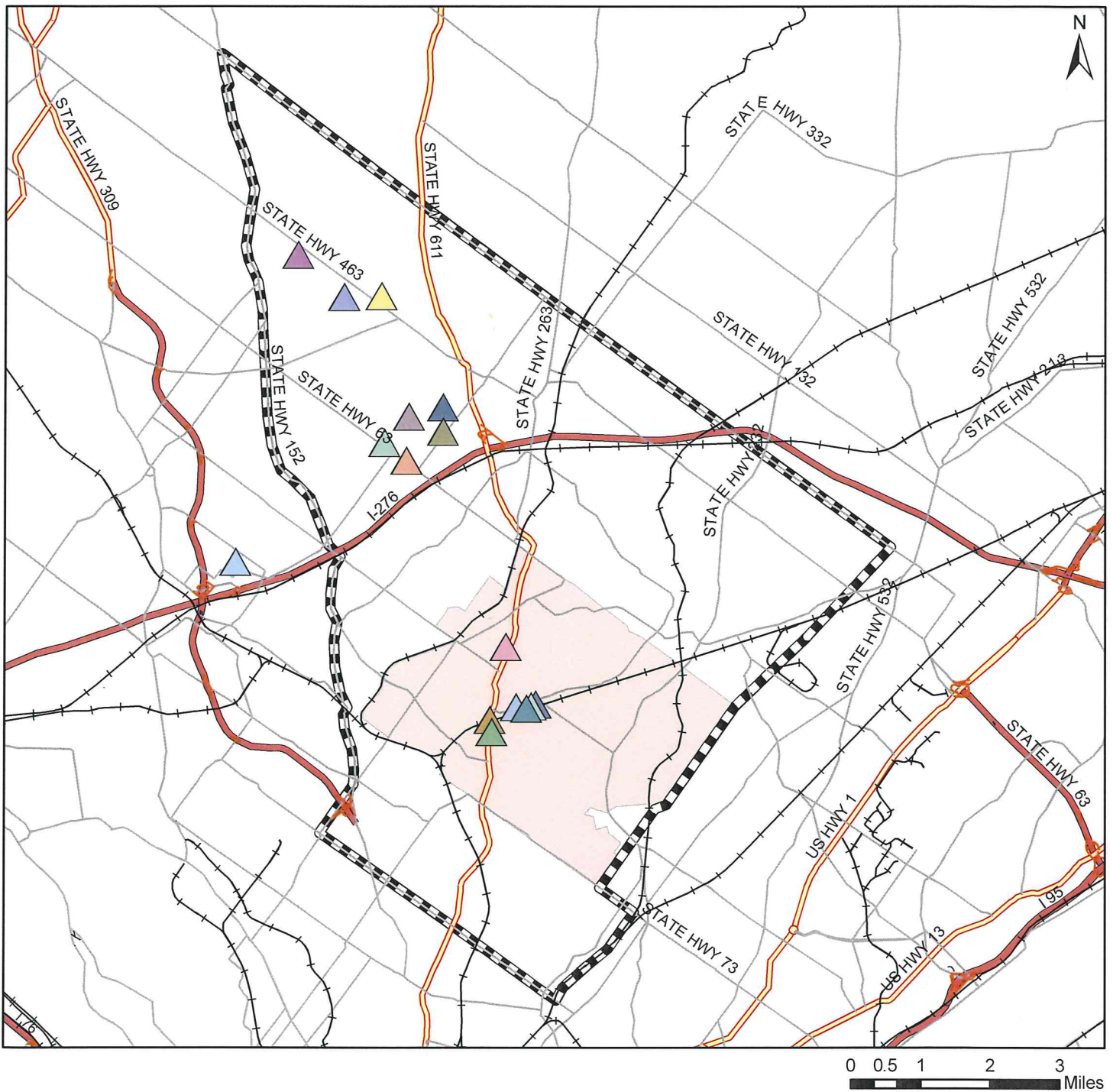
As shown in Table 3.24, there are currently 11.4 million square feet of rentable building area (RBA) in the study area, representing

10.9 percent of the office space in Suburban Philadelphia.

Class A office space makes up 42 percent of the study area’s RBA with 4.8 million square feet of space. Of the 4.8 million square feet of Class A space, 11.9 percent was vacant. This vacancy rate was lower than the vacancy rate for Class A space in Suburban Philadelphia (14.3 percent). Approximately 17 percent of the Class A space in Suburban Philadelphia that was under construction was in the study area. The lower vacancy rate and the amount of Class A office space under construction could indicate greater demand for office space in the study area relative to the suburban area. The average quoted asking rental rate for Class A space in the study area was \$23.66 per square foot, which was 12.5 percent lower than the asking rate in the suburban area (\$26.61).

There was 5.0 million square feet of Class B office space in the study area, representing approximately 13.2 percent of the suburban area’s Class B office space. Demand for Class B space in Suburban Philadelphia appears to be stronger when compared to the study area. The vacancy rate for Class B space was slightly higher in the study area at 14.3 percent, compared to 13.0 percent in Suburban Philadelphia. Also, although over 100,000 square feet of Class B space was absorbed in the suburban area, there was nearly 60,000 square feet of negative absorption in the study

⁸ According to CoStar, Suburban Philadelphia includes the following subareas: Bala Cynwyd/Narberth, Conshohocken, Delaware County, Exton/Whitelands, Ft. Washington/Spring House, Horsham/Willow Grove, King of Prussia/Wayne, Lower Bucks County, Main Line, Norristown/Valley Forge, Outer Chester County, Plymouth Meeting/Blue Bell, Upper Bucks County, Upper Main Line, West Chester, and West Montgomery County.



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-10: OFFICE MARKET STUDY AREA

Office buildings in Abington

- 1077 Rydal Road
- Levy Medical Plaza
- American Financial Realty Center
- Baederwood Shopping Center

Office Complexes Around Abington

- Noble Plaza
- 1095 Rydal Road
- Thomas J Paul building
- Babylon Business Campus
- Cedar Creek Corporate Center
- Commonwealth Corporate Center
- Fort Washington Office Center
- Horsham Business Center
- Horsham Tech Center
- Keith Valley Business Center
- Pennsylvania Business Campus
- Walnut Grove Corporate Center

- Limited Access
- Highways
- Secondary Roads
- Other
- Highway Ramp
- Rail
- Residential Market Study Area
- Office Market Study Area

area, indicating that more tenants are moving out of Class B space than tenants moving in. The average asking rental rate for Class B space is another indication of lower demand in the study area, as the rental rate in the study area was \$20.05, approximately 8.0 percent lower than the rental rate in the suburban area (\$21.79).

Approximately 8 percent of the Class C office space in Suburban Philadelphia was in the Horsham/Willow Grove subarea. While the suburban area had nearly 99,000 square feet of net absorption, the study area had negative absorption of 15,482 square feet of Class C space. This could indicate weaker demand in the study area when compared to the suburban area. However, the vacancy rate in the study area for Class C space is 7.6 percent, which was lower than the vacancy rate in the suburban area (8.9 percent). The average rental rate in for Class C space in the study area was \$20.68.

■ Evaluation Of Competition

A significant portion of the Horsham/Willow Grove office market is located at Pennsylvania

Business Campus, which is bounded by Dresher, New, Blair Mill, and Welsh Roads. This campus covers 200 acres and includes 2.5 million square feet of office space, making up approximately 52 percent of the inventory of office space in Horsham. The buildings are relatively new, with build years ranging from 1971 to 2001. The campus has excellent accessibility due to its location near Routes 63, 463, and 611, and less than one mile from the Pennsylvania Turnpike. There are several amenities near this campus, including restaurants, hotels, Horsham Fitness Club, Star Bank, and a walking/jogging trail throughout the business campus. There is ample parking with surface parking lots adjacent to the office buildings.

Table 3.25 shows data for a sample of Class A and Class B office buildings at the Pennsylvania Business Campus. Although several buildings are fully leased, others are about 67 percent leased. Rents for Class A office space are competitive, ranging from \$21.75 to \$23.75 per square foot—comparable and in some cases slightly lower than Class A office space in the study area (\$23.66 per square foot). Rents

	Existing Inventory		Vacancy (percent)	YTD Net Absorption	YTD Deliveries	Under Construction	Average Rental rate per SF
	Number of Buildings	Rentable Building Area					
Horsham/Willow Grove Submarket							
Class A	49	4,802,379	11.9	24,612	0	120,000	\$23.66
Class B	162	4,959,566	14.3	(57,760)	12,000	0	\$20.05
Class C	191	1,662,495	7.6	(15,482)	0	0	\$20.68
Total Office Market	402	11,424,440	12.3	(48,630)	12,000	120,000	\$21.84
Suburban Philadelphia							
Class A	565	46,538,537	14.3	922,658	813,175	693,069	\$26.61
Class B	1,663	37,574,409	13.0	104,631	120,246	713,132	\$21.79
Class C	2,076	20,726,644	8.9	98,988	7,000	0	\$20.30
Total Office Market	4,304	104,839,590	12.8	1,126,277	940,421	1,406,201	\$24.16
Source: CoStar Office Report, Philadelphia Office Market, Third Quarter 2007							

Table 3.24 Office Market Characteristics

Address	Building Class	Year Built	Building Size (SF)	% Leased	Annual Rent (PSF)
120 Gibraltar Road	A	1978	51,684	85.6	\$21.75
200 Gibraltar Road	A	1990	63,587	100.0	--
240 Gibraltar Road	A	1990	63,587	100.0	--
680 Blair Mill Road	A	2001	120,975	66.7	\$23.75
2 Walnut Grove Drive	A	1989	81,856	93.3	\$22.75
5 Walnut Grove Drive	A	2000	105,000	66.7	\$23.50
101 Gibraltar Road	B	1978	56,845	100.0	--
110 Gibraltar Road	B	1971	59,220	96.8	\$20.75
100-107 Lakeside Drive	B	1982	27,465	100.0	--
200-264 Lakeside Drive	B	1982, Renovated 2000	54,623	100.0	--
300-309 Lakeside Drive	B	1982, Renovated 2000	43,832	100.0	--
132 Welsh Road	B	1997	45,000	76.4	\$21.75

Source: Liberty Property Trust, Accessed November 20, 2007

Table 3.25 Pennsylvania Business Campus Data

for Class B office space in the Pennsylvania Business Center are \$20.75 per square foot and \$21.75 per square foot, comparable to Class B space in the study area (\$20.05 per square foot).

Despite these strengths, space is available at this campus, and would compete with offices throughout the study area for new tenants.

■ Office Inventory On Old York Road

There are a variety of office buildings on Old York Road, ranging from low-rise buildings with single tenants to the four-story Noble Plaza at 801 Old York Road. Two office buildings have recently been added to the market (office building at the corner of Old York Road and



Pennsylvania Office Campus, 6 Walnut Grove Drive (Class A building)



Pennsylvania Business Campus, 101 Gibraltar Road (Class B building)

Brook Road and the Levy Medical Plaza), however the larger office buildings have build years between 1965 and 1981. Although much of the office space on Old York Road is occupied by professional service firms, medical offices, such as Levy Medical Plaza, are prevalent in the study area due to their proximity to Abington Memorial Hospital.

One of the largest office buildings in the study area is Noble Plaza at 801 Old York Road. It is a 68,153-square foot building that was built in 1975. Tenants of the four-story building include a bank (Fulton Bank) and several professional service tenants (CPAs, lawyers, real estate firms, medical offices). Ample parking surrounds this



Noble Plaza, 801 Old York Road



Office buildings on Rydal Road, 1077 Rydal Road and Thomas J. Paul building

building. In addition, it is adjacent to the Noble SEPTA station.

There is a small cluster of office buildings along Rydal Road, including 1077 Rydal Road, the Thomas J. Paul building at 1061 Rydal Road, and Rydal Executive Plaza located at 1095 Rydal Road. These buildings provide parking for their employees, clients, and visitors. In addition, they are near the Rydal SEPTA station.

The professional building at 1077 Rydal Road was built in 1975 and is 20,277 square feet. It is occupied by professional service firms such as law firms and medical offices. Rent for office space in this building is \$21.50 per square foot, which is comparable to the average asking rent in the Horsham/Willow Grove subarea (\$21.84 per square foot). Vacancy is low at 5 percent (1,050 square feet).⁹

Rydal Executive Plaza, which was built in 1976, is approximately 30,000 square feet with a parking lot for 127 cars. Tenants include a mixture of medical offices and financial services firms. Approximately 3,750 square feet of space is vacant in this building (12.5 percent). Rent at this building is \$24.00 per square foot, approximately 10 percent higher than the Horsham/Willow Grove asking rate.

There are two, 80,635-sf buildings with apartments and office space on The Fairway. Although the Rydal East-West buildings are primarily residential with 114 apartment units, approximately 5 percent is occupied by office space. These offices, which were built in 1965, are occupied by professional and financial services firms as well as medical offices.

Another concentration of office space on The Fairway is located at the Baederwood Shopping Plaza. This building is primarily retail, however there are approximately 17,000 square feet

⁹ Interview with Mike Cohen at Situs Realty on November 20, 2007.

of office space on the second floor above the retail stores. In addition, the planned Brandolini development, which would be located at this shopping center, is expected to add additional office space to the study area.

There has been one recent addition to the office market at 1021 Old York Road where 3.5 floors of the four-story office building are rented. Two tenants are currently in the space, and another tenant is scheduled to move into the space in February 2008. The tenants include a dentist, an insurance company, and a real estate firm. Rents are competitive, ranging from \$18 per square foot to \$23 per square foot plus common area maintenance fees.¹⁰

Although just outside of the study area in Jenkintown, American Financial Realty Center at 610 Old York Road has 151,360 square feet of rentable building area in the former Strawbridge and Clothier building. The building is occupied primarily by financial services firms such as Morgan Stanley, Raymond James & Associates, and The Aranda Group. Employees and clients have access to around 600 covered and surface



New office building at 1021 Old York Road

¹⁰ Interview with Stan Casacio on November 28, 2007.

parking spaces that are adjacent to the building. Vacancy is low, however approximately 7,850 square feet of space is currently available for \$21.50 per square foot – comparable to the average asking rate for the Horsham/Willow Grove subarea. This office building, though outside of the study area, does affect demand for office space along the corridor.

■ Evaluation Of Demand

The office market is relatively strong on Old York Road. As discussed above, the office buildings are primarily rented by medical, financial, and other professional services. The office buildings provide ample parking, and several buildings are located near the Rydal or Noble SEPTA stations. The larger office buildings have low vacancy rates, at 5 percent at 1077 Rydal Road and 12.5 percent at Rydal Executive Plaza. Also, rents range from \$18 per square foot to \$24 per square foot, and are competitive with the Horsham/Willow Grove office market rents. By and large, the space at the larger office buildings on the Old York Road corridor is doing better than the Philadelphia Suburban market and just as well as the Horsham/Willow Grove submarket. However, absorption of office space is currently low, with only 24,612 square feet of Class A space absorbed YTD in the Horsham/Willow Grove submarket. Together with possibility of additional office space in the Brandolini redevelopment of the Baederwood Shopping Center, there would likely be sufficient office inventory to absorb demand in the next 2 to 3 years. In addition, Abington Memorial Hospital can likely take care of its near term need for office space by building a new office building on a site it owns next to the Levy Medical Plaza. Thus, although existing market conditions are good, there is probably not enough demand for additional office space in the near future. As absorption takes currently available and planned space off the market, the climate for new office development in the corridor would improve, particularly near the SEPTA train stations.

HOTEL MARKET ANALYSIS

HOTEL TRADE AREA

An analysis of hotel supply and demand was undertaken to determine the market for a new hotel in the Old York Road study area corridor. Currently there are no hotels in the study area. An Internet search located twelve hotels in close proximity to the study area, distributed in three nearby municipalities including: Willow Grove, located in Upper Moreland Township immediately north of the study area; Horsham Township, located north of I-276 (Pennsylvania Turnpike) along State Route 611; and Fort Washington, located in Upper Dublin Township also north of I-276.

As illustrated in Figure 3.11, the existing hotels in the vicinity of Abington are concentrated along Pennsylvania Turnpike (I-276). Half of the hotel inventory is more than 10 years old. While the population of the study area has not changed significantly since 1990, the commercial and institutional components of the Old York Road corridor have changed, with a greater emphasis on the service sector particularly businesses and institutions associated with health and financial services. In addition, the Abington campus was made a Penn State college in 1997 offering 4-year degree programs with the restructuring of the former Commonwealth Educational System. The change in the commercial and institutional composition of the township over the past decade may also have affected the demand for lodging.

HOTEL SUPPLY

■ Lodging Types And Levels Of Service

The twelve hotels in the analysis provide a variety of lodging options, levels of service and price points for overnight guests, including four

upscale hotels, five midscale hotels and three economy hotels:

– **UPSCALE HOTELS**

Upscale hotels typically offer distinctive and elegant décor, highest quality furnishings, premium guest room amenities, and a high staff-to-guest ratio. Suite chains and resorts may be included in the upscale category. Upscale lodging facilities in the Abington hotel trade area include:

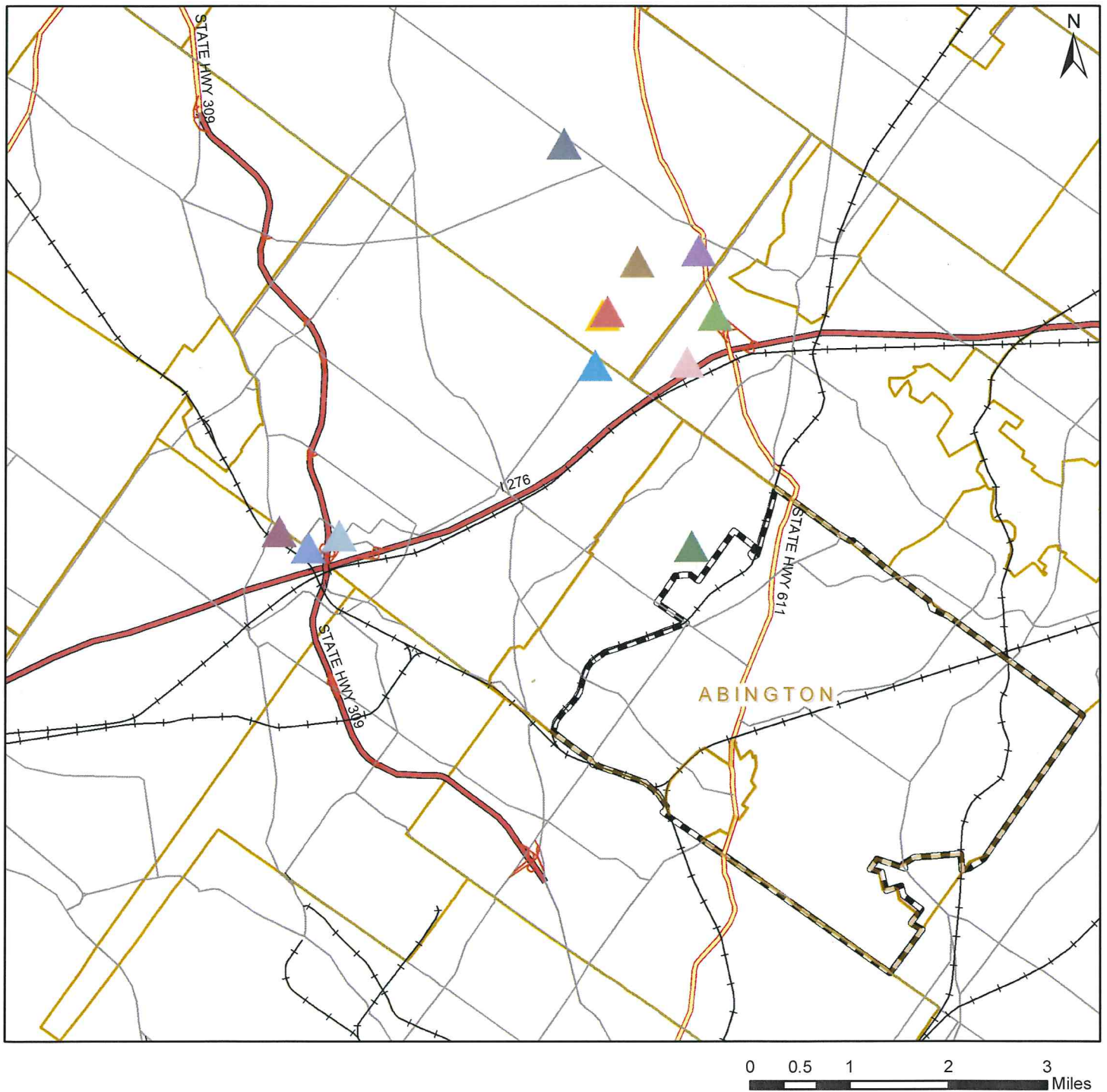
- Hilton Garden Inn Philadelphia/Fort Washington, Fort Washington, PA
- Residence Inn Philadelphia Willow Grove, Horsham, PA
- Courtyard Willow Grove, Willow Grove, PA
- Springhill Suites Philadelphia Willow Grove, Willow Grove, PA



Hilton Garden Inn, Fort Washington, PA

– **MIDSCALE HOTELS**

Midscale hotels are characterized by nicely appointed rooms, limited but good quality amenities, and usually on-property full-service



Old York Road Corridor Improvement Study, Abington Township
FIGURE 3-11: HOTEL INVENTORY

- | | | | | | |
|--|--|--|--|--|----------------------|
| | Best Western Fort Washington Inn | | Hampton Inn, Philadelphia/Willow Grove | | Limited Access |
| | Candlewood Suites Philadelphia | | Hilton Garden Inn Philadelphia/Fort Washington | | Highways |
| | Courtyard Willow Grove | | Homestead Horsham/Willow Grove | | Secondary Roads |
| | Days Inn Horsham | | Residence Inn Philadelphia/Willow Grove | | Other |
| | Extended Stay America Philadelphia/Horsham | | Springhill Suites Willow Grove | | Highway Ramp |
| | Fort Washington Hotel & Conference Center | | TownePlace Suites Philadelphia/Horsham | | Rail |
| | | | | | Municipal boundaries |
| | | | | | Study Area |

restaurant and meeting rooms. Some may have swimming pools. In the Abington hotel trade area the midscale hotels include:

- Best Western Fort Washington Inn, Fort Washington, PA
- Holiday Inn Fort Washington, Fort Washington, PA
- TownePlace Suites Philadelphia Horsham, Horsham, PA
- Candlewood Suites Philadelphia, Horsham, PA
- Hampton Inn Philadelphia Willow Grove, Willow Grove, PA



Best Western, Fort Washington, PA

– **ECONOMY HOTELS**

Economy hotels are clean, comfortable and functional facilities, offering a limited range of services and amenities. Suite chains can be part of this category, and in the lower tier the suite unit typically includes a small living room, small bedroom and a kitchen area. In the Abington hotel trade area the economy hotels are:

- Homestead Horsham Willow Grove, Horsham, PA
- Extended Stay America Philadelphia Horsham, Horsham, PA
- Days Inn Horsham, Horsham, PA

■ **Hotel Operating Characteristics**

There are a total of 1,675 rooms in the twelve hotels located in the Abington hotel trade area. Only four of the twelve hotels have more than 150 rooms. The distribution of rooms by service level is shown below in Table 3.26. The largest percentage of rooms is found in midscale hotels, about 41 percent. Approximately 1/3 of the rooms are in upscale hotels, and about 1/4 in economy hotels.

Level of Service	Number of Rooms	Distribution of Rooms (percent)
Upscale	568	33.9
Midscale	684	40.8
Economy	423	25.3
Total	1,675	100.0

Sources: Smith Travel Research, 2007; AKRF, Inc., 2007.

Table 3.26 Distribution of Hotel Rooms by Level of Service

Almost the entire hotel inventory is more than five years old (10 out of 12 hotels). Half of the inventory (6 out of 12 hotels) is more than 10 years old. A description of each hotel follows, including opening date, number of rooms, room rate, available food service, and amenities (see Table 3.27).

■ Hotel Demand

The average occupancy rate for all twelve hotels in the trade area was 69.0 percent from 2001 to 2006 – an acceptable rate in an industry that typically considers hotel operations financially viable at an average occupancy rate of about 65 percent. In 2006 occupancy was over 60 percent from March through November, with October and June being the busiest months, 77.2 percent and 68.7 percent respectively. Tuesdays and Wednesdays were the busiest days of the week. However, Saturday occupancy also ranked high, i.e., the third busiest day of the week in May, July, August, September, and October, with occupancy rates ranging from a high of 84.1 percent in October to a low of 65.6 percent in July.

These data indicate that the clientele in the hotel trade area are principally business travelers, but the unusually high Saturday occupancy from May through October indicates that weddings and perhaps graduations, as well as vacation travel are a key part of the hotel market.

■ Evaluation Of Demand

The presentation of the data by Smith Travel Research does not allow the analysis to determine the performance of any one brand or type of hotel, but it does indicate that:

- the total supply of hotel rooms is not overwhelmingly large, considering the population and employment in the study area corridor and the number and type of businesses and institutions that may generate demand for hotel rooms;

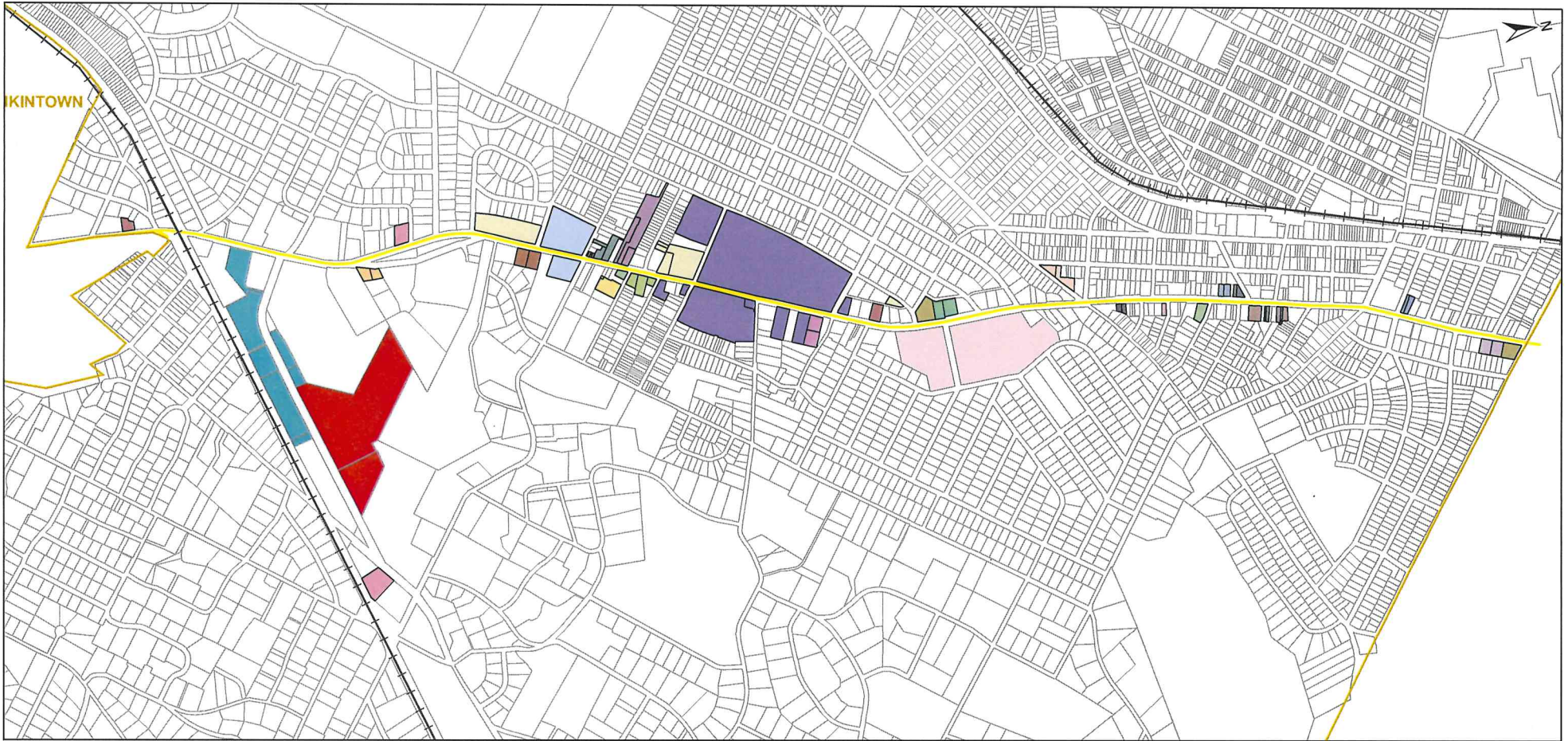
- the economy hotel market is underserved, given that only 25 percent of the hotel properties (3 hotels) and 25 percent of the room supply (423 rooms) are in the economy category;
- the average annual hotel occupancy in the trade area (69 percent) is sufficiently high to indicate that the existing hotel inventory is profitable, but not too high to have saturated the market;
- the market could accommodate the addition of a new hotel property, most likely at the economy level.

In late October 2007 the Jenkintown Borough Council accepted a proposal by a real estate developer to build a “boutique hotel” on a site close to the border with Abington Township. Although we were unable to obtain information regarding the proposed number of rooms and amenities, the Council hoped that the hotel would provide banquet and catering space. Office and retail development had also been considered for the area, but the Council accepted the hotel proposal based on a recent feasibility study. Should the proposed hotel become a reality over the next 12 to 18 months, its size and level of service would affect the demand for additional hotel space in the Old York Road corridor.

PROPERTY CHARACTERISTICS

PROPERTY OWNERSHIP

There are 207 lots in the corridor study area with access from Old York Road or from The Fairway with a total land area of approximately 9.2 million square feet.¹¹ Property owners who own multiple parcels in the study area are shown on Figure 3.12. As illustrated in the figure, few owners control more than one parcel fronting on Old York Road or The Fairway.



Old York Road Corridor Improvement Study, Abington Township

0 0.050.1 0.2 0.3 Miles

FIGURE 3-12: TWO OR MORE PARCELS UNDER SINGLE OWNERSHIP

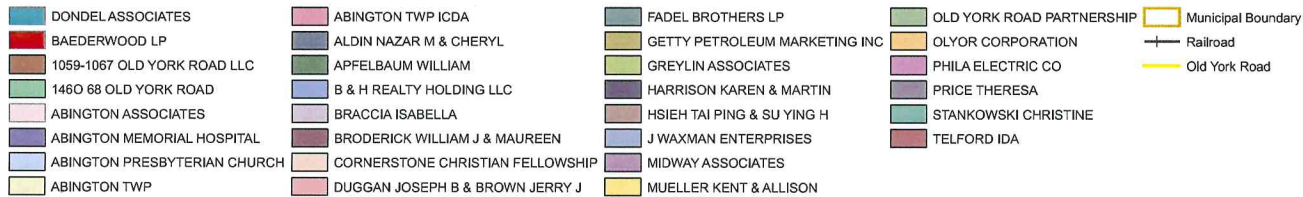


Table 3.27 Hotel Operating Characteristics

Hotel	City	State	Type	Opened	# Rooms	Avg. Rate*	Room service	Bar	Restaurant	Breakfast	Meeting Rooms	Banquet Rooms	Gym	Pool	Business Center	Other
Courtyard Willow Grove	Willow Grove	PA	Upscale	1989	149	\$205	None	On-site	On-site	In Restaurant	2 (Cap. 40, 40)	None	Yes	None	Yes	
Hilton Garden Inn Philadelphia/Fort Washington	Fort Washington	PA	Upscale	2007	146	\$149	Yes	None	On-site	In Restaurant	2,795 sq. ft.	2,795 sq. ft.	Yes	Indoor	Yes	
Residence Inn Philadelphia Willow Grove	Horsham	PA	Upscale	1991	118	\$220	None	None	None	Free Buffet	1 (544 sq. ft.)	None	Yes	Outdoor, Heated	None	In-room kitchens; extended stay
Springhill Suites Philadelphia Willow Grove	Willow Grove	PA	Upscale	2002	155	\$239	None	None	None	Free Buffet	2 (1,080 sq. ft. total)	None	Yes	Indoor	Yes	
Best Western Fort Washington Inn	Fort Washington	PA	Midscale	1966	104	\$109	None	On-site	On-site	Free Buffet	Cap. 125	Yes	Yes	Outdoor	Yes	
Candlewood Suites Philadelphia	Horsham	PA	Midscale	1997	110	\$99	None	None	None	None	None	None	Yes	None	None	
Fort Washington Hotel & Conference Center (formerly Holiday Inn Fort Washington; bought 10/06)	Fort Washington	PA	Midscale	1975	225	109	Yes	On-site	On-site	In Restaurant	Cap. 350	Cap. 350	Yes	Outdoor	Yes	
Hampton Inn Philadelphia Willow Grove	Willow Grove	PA	Midscale	1989	150	\$159	Yes	None	None	Free Buffet	2 (Cap. 40, 40)	None	Yes	None	None	
TownePlace Suites Philadelphia Horsham	Horsham	PA	Midscale	1999	95	\$139	None	None	None	Coffee in lobby	None	None	Yes	Outdoor, Heated		In-room kitchens; extended stay
Days Inn Horsham	Horsham	PA	Economy	1987	171	\$92	None	None	Adjacent	Free Continental	Yes	None	Yes	None	Yes	
Extended Stay America Philadelphia Horsham	Horsham	PA	Economy	2001	116	\$112	None	None	None	None	None	None	None	None	None	In-room kitchens; extended stay
Homestead Horsham Willow Grove	Horsham	PA	Economy	1998	136	\$112	None	None	None	None	None	None	None	None	None	In-room kitchens; extended stay

Notes: *Average Rate reflects the average nightly rate for a double-occupancy room.
Sources: The location, year of opening, and total room count as of October 2007, was provided by Smith Travel Research. All other information regarding hotel rates, amenities and facility space was accessed directly from the hotel's website in November, 2007.

However, there are five land owners that control multiple parcels with a combined lot area greater than 350,000 square feet. Baederwood LP has the largest concentration – approximately 799,326 square feet. Abington Associates owns two parcels with a total lot area of 737,056 square feet.¹¹ Abington Memorial Hospital owns the third largest concentration of land in the study area with 9 parcels totaling 600,338 square feet. Dondel Associates owns 5 parcels with 453,780 square feet located primarily on The Fairway. Finally, Abington Township and Abington Township ICDA own 8 parcels with a combined lot area of 396,130 square feet. In all, these 5 land owners control a total of 26 parcels encompassing approximately 3.0 million square feet, or about 32 percent of the lot area accessible from Old York Road and from The Fairway.

In addition, three parcels in separate ownership have a total combined lot area of approximately 2.8 million square feet, representing 31 percent of the total lot area accessible from Old York Road or The Fairway. These parcels include the Rydal Waters site with a lot area of 1.4 million square feet; Noble Town Center Associates LP which owns one parcel that has a lot area of 805,424 square feet; and Philadelphia Presbyterian Homes which owns one parcel on The Fairway with a lot area of 561,053 square feet.

Having control of a substantial portion of the lot area accessible from Old York Road and The

¹¹ Ownership and assessment data was obtained from parcel information from Abington Township supplemented with information from Montgomery County's property records database. (<http://propertyrecords.montcopa.org/Main/Home.aspx>)

¹² According to Montgomery County's property records database, approximately 286,625 square feet of the property at 1495 Old York Road is owned by Target Corp.

Fairway in the hands of a few property owners can be beneficial to creating new redevelopment opportunities. All but one of these large parcels has already been developed; only the Rydal Waters site remains vacant. However, several include large parking lots (such as the upper parking lot at Noble Town Center) or storage areas for automobiles (such as the Eckenhoff dealership, as shown in Photo below) that could potentially be reconfigured for denser or more efficient use of the property.

While there appears to be a substantial consolidation of land area under the control of a few owners, the remainder of the parcels fronting on Old York Road and The Fairway are small and in individual ownership. This condition particularly characterizes the area along Old York Road north of Edge Hill Road, which could make redevelopment of this segment of the corridor problematic. As noted in the following chapter describing Opportunity Clusters, the presence of several contiguous vacant sites north of Edge Hill Road could possibly ameliorate the problem, even though the parcels are individually owned.



Storage areas for automobiles

ASSESSED VALUES

The total assessed value of properties along Old York Road and on The Fairway is approximately \$320 million, based on data available from

Montgomery County's property records database.

As discussed in the following chapter in more detail, our market analyses and evaluation of land uses, building types, vacancies, and various other assets and constraints led us to conclude that there are four opportunity clusters along the corridor. These clusters are: TOD, Institutional, Commercial, and Dining & Entertainment. The two clusters at the southern end of the corridor make up nearly 90 percent of the total value. The Institutional Cluster makes up the majority of the total assessed value along the corridor with a valuation of approximately \$204.9 million or 64 percent of the total assessed value of properties accessible from Old York Road or from The Fairway. This is largely based on the properties owned by or associated with Abington Memorial Hospital. The TOD Cluster (including properties on The Fairway) follows with a value of \$81.8 million or about 25 percent of the total assessed value in the corridor, most likely based on the value of the automobile dealers, Noble Plaza, Noble Town Center, and the Baederwood Shopping Center.

Only 11 percent of the total assessed value is attributable to properties in the two clusters at the northern end of the corridor with \$13.4 million or 4 percent of the valuation in the Commercial Cluster and \$22.5 million or 7 percent in the Dining & Entertainment Cluster.

OPPORTUNITY CLUSTERS

The study area for the Old York Road corridor (State Route 611) extends from roughly Rydal Road in the south to Moreland Road in the north, a distance of approximately 3 miles. The principal economic activities in the corridor are commercial and institutional uses, such as the Noble Town Center, Abington Town Center, Abington Shopping Center, Abington Memorial Hospital, Abington Township Municipal Building, Abington YMCA, and several churches. The

Abington Campus of Penn State University, located between Woodland Road and Cloverly Lane east of Old York Road, is one of the major institutions in the township. These businesses and institutions provide approximately 17,000 jobs for residents throughout the Philadelphia Metropolitan Area, and draw thousands of shoppers, employees, and visitors to the Old York Road corridor on a regular basis.

The topography along the corridor is varied, with high points near the intersections with Rydal Road, Susquehanna Road, and Edge Hill Road. In general the peaks and valleys along Rt. 611 provide relatively long views that permit travelers to identify their destinations well in advance. The high visibility of most sites along the corridor is in general an asset to businesses and institutions that deal with the public.

The corridor itself can be divided into four principal clusters of economic activity. Each cluster has its own set of assets and constraints that impact existing economic conditions and could affect opportunities to expand or improve economic activity in the future. From south to north the four opportunity clusters include:

- **Transit-Oriented Development (TOD) Cluster** where future economic activity could be substantially influenced by the location of the Noble Station (SEPTA R3 line) near the intersection of Old York Road and Rydal Road. The cluster extends from Rydal Road in the south to the Abington Free Library at Old Orchard Road in the north, a distance of approximately ½ mile.
- **Institutional Cluster** where prominent institutional uses provide a broad range of services that affect the quality of life of the residents of Abington Township, particularly Abington Memorial Hospital, Abington Free Library, Abington YMCA, Abington Municipal Building, U.S. Post Office, Montgomery County District Court, and the historic Abington Presbyterian Church, among others. The Institutional Cluster extends along

Old York Road from Old Orchard Road in the south to Highland Road in the north.

■ **Commercial Core Cluster** which contains the largest concentration of retail uses in the Old York Road study area corridor, including the Abington Town Center anchored by a Target Department Store, Abington Shopping Center anchored by a Giant Supermarket, plus free standing retailers such as the Abington Pharmacy, Kitchen Bar Restaurant, and Blockbuster Video. The Commercial Core Cluster extends along Old York Road roughly from Highland Road in the south to Edge Hill Road in the north.

■ **Dining and Entertainment Cluster** which comprises the northern gateway to the study area corridor, extending along a relatively flat portion of Rt. 611 between Edge Hill Road in the south and Moreland Road in the north. Currently this opportunity cluster contains the greatest concentration of national chain restaurants in the study area

corridor, as well as local restaurants with high brand recognition. Among the national chains are McDonald's, Dunkin' Donuts, Boston Market, and the Pretzel Factory. Well known local restaurants in the cluster include Rita's, Lee's Hoagie House, Koki Japanese Restaurant, Bonnet Lane Restaurant, and Romeos Bar. In all, 9 of the corridor's 23 restaurants are located in this cluster, or nearly 40 percent of all eating and drinking places along Old York Road from roughly Rydal Road to Moreland Road.

TRANSIT-ORIENTED DEVELOPMENT (TOD) CLUSTER

■ ASSETS

The strongest asset of this cluster is its relatively dense concentration of commercial activity which consists primarily of new car dealerships and retail stores – both high-power destinations for local and regional residents. While these types of businesses do not necessarily depend



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-13: TRANSIT ORIENTED DEVELOPMENT (TOD) CLUSTER



on mass transit to attract their customers, they do create an image that the TOD Cluster is an active, thriving area where businesses are successful. The TOD Cluster combines brand name recognition with good visibility, making development sites in the TOD Cluster among the most valuable in the study area. The cluster combines national chains such as Barnes & Noble, Houlihan's, Bed Bath & Beyond and Old Navy with Class A office space in Noble Plaza within the ¼ mile of the Noble Station. Typically the primary pedestrian district is located within a ¼ mile of a train station, and the secondary pedestrian district within a ½ mile of a station. Extending the TOD influence to a ½ mile radius from the Noble Station captures several other prized national retail chains, including Trader Joe's and Whole Foods along with residential condominiums and office space in the Rydal East-West complex. The concentration of such recognizable retailers in a free-standing setting offers the opportunity to attract additional brand name retailers to available sites or in combination with mixed-use development to enhance the image of Abington.

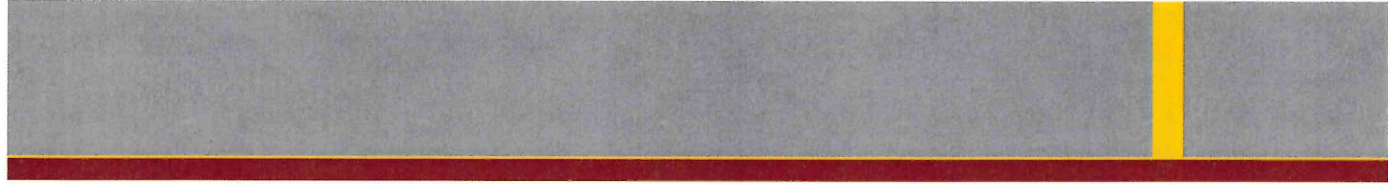
Adding to the regional attraction of the TOD Cluster is the concentration of new car dealerships, including Sussman Acura and Faulkner Jeep Chrysler Dodge on Old York Road near Rydal Road, and Eckenhoff Buick Pontiac GMC Cadillac Hummer on The Fairway, all within the ¼ mile primary pedestrian district. In addition, the Saturn of Jenkintown dealership, located on Old York Road across from the library, is within ½ mile of the Noble Station. In 2006 auto dealerships in the study area had sales of about \$367 million, which represented 16 percent of all new and used car sales in Montgomery County. Over \$200 million of the \$367 million in auto sales came from buyers who live outside the Old York Road study area, serving as an example of their powerful draw, including the dealerships on Old York Road and The Fairway.

The TOD Cluster is one of the richest in assets and opportunities among the four clusters within the Old York Road study area corridor, primarily

due to the amount of land that is either vacant or used for surface parking and auto storage. The determination of the opportunity clusters is based in part on the concept that surface parking lots and auto storage areas can be reconfigured to permit new development in the context of existing businesses and institutions, while continuing to meet the parking demand of existing businesses.

Among the most strategic vacant sites in the corridor in terms of connectivity to the existing concentration of commercial activity, visibility, and proximity to the R3 line is the former Eckenhoff Buick Pontiac GMC dealership on the west side of Old York Road near Rydal Road. The availability of the vacant car dealership at the southern gateway to the Old York Road corridor in Abington presents an extraordinary opportunity to enhance the image of the corridor as an economic engine that is important to the Township and the County. Another strategic site at the edge of the ¼ mile TOD district is the upper parking lot of Noble Town Center which is substantially underutilized. Other opportunity sites include a parking lot associated with Noble Plaza adjacent to the train station and auto storage associated with the new car dealerships located along Old York Road and The Fairway.

Perhaps the biggest asset in terms of future development opportunity is the largely vacant Rydal Waters site of approximately 34 acres, which is now in bankruptcy court. Portions of the Rydal Waters site are located within the ½ mile TOD secondary pedestrian district, providing an acceptable walking distance for new residential and commercial development. Other development opportunities in the TOD Cluster include the Baederwood Shopping Center where there is already a proposal for a mixed-use development of 266 residential units and 168,000 square feet of new retail space. Adding residential units in the TOD Cluster would increase pedestrian activity and create a more urban environment that would benefit existing retailers and help attract new retail stores. At the same time, the proximity of these vacant



and underutilized sites to the Noble Station makes them even more attractive for residential development.

Just beyond the ½ mile TOD pedestrian radius is Rydal Park of the Philadelphia Presbytery Homes near the intersection of The Fairway and Susquehanna Road, a growing residential community that could also contribute to a more pedestrian-oriented environment in the TOD Cluster, while providing additional retail demand and local purchasing power. The nearby concentration of Class A professional offices at the eastern edge of The Fairway, including the Thomas J. Paul Building, 1077 Rydal Road and the Rydal Executive Plaza offers the beginnings of the critical mass of office space necessary to attract additional office development. A significant portion of the tenants in these office buildings provide medical and other health and wellness services, perhaps reflecting the dominant role in the local economy played by Abington Memorial Hospital. At the same time these offices generate a daytime population that could support local retailers and restaurants.

■ CONSTRAINTS

From an economic point of view the TOD Cluster has few constraints. The most troublesome constraint is that there are only a few truly vacant sites, limited largely to the Eckenhoff Buick Pontiac GMC site and the Rydal Waters site. The center of gravity in the TOD cluster wants to be located close to the Noble Station to take advantage of the proximity to mass transit as a marketing tool, particularly for any new residential and office development. Except for the vacant Eckenhoff site, any new development in this cluster linked to TOD would require reconfiguration of existing auto dealerships or shopping centers, an action that is possible but not imminent as suggested by the public's reaction to the redevelopment of the Baederwood Shopping Center. However, market forces, i.e., supply and demand, may win the day for future development in the TOD Cluster based

on the old real estate adage, "Location, location, location."

INSTITUTIONAL CLUSTER

■ ASSETS

The Institutional Cluster is the primary employment center in the corridor. Abington Memorial Hospital alone provides more than 5,000 jobs, accounting for nearly 1/3 of the total employment in the study area. As such, it generates hundreds millions of dollars in personal income for local and regional residents. In addition to the extraordinary concentration of jobs and economic activity, the Institutional Cluster provides services that are essential to the wellbeing of residents of the township and the broader region. For example, Abington Memorial Hospital offers state of the art programs and services in cardiac and pulmonary care, cancer care, and joint replacement. Its maternity ward is one of the busiest in the state, and its trauma center provides a level of service available at no other hospital in Montgomery County. More than 800 doctors are associated with the hospital as staff or specialists. Abington Memorial is a community hospital that is essential to maintaining a high quality of life for many local and regional residents. Additional health and safety services are provided by the Abington Police Department and the Abington Fire Company, both headquartered in facilities adjacent to the Abington Township Municipal Building.

The Institutional Cluster also contains the Abington YMCA which provides facilities for recreation and general wellness for community members. The Y maintains a swimming pool, fitness center, gymnastics center, and offers child care, after school care, and a summer camp program. It sponsors basketball leagues and offers massage therapy. The facility is open seven days per week and is an integral part of the quality of life and health of the community.



Old York Road Corridor Improvement Study, Abington Township
FIGURE 3-14: INSTITUTIONAL CLUSTER



The Abington Free Library (AFL) also contributes to the lifestyle that is sort after by many residents of Abington Township. AFL provides programs in adult literacy, as well as learning and literature programs for teens and children.

In general the Institutional Cluster is an asset to the entire township and in many cases to a broader regional population. Maintaining the quality of the health, safety and wellness services and facilities is a key to maintaining the quality of life that is integral to Abington as a community. This means that certain institutional facilities will need to be upgraded and/or expanded from time to time to keep pace with changing technologies and demand for additional services. Because of the existing concentration of institutional services in the area offers accessibility and convenience to local and regional residents, it would be best to provide

an opportunity to expand and upgrade these services within the Institutional Cluster.

■ CONSTRAINTS

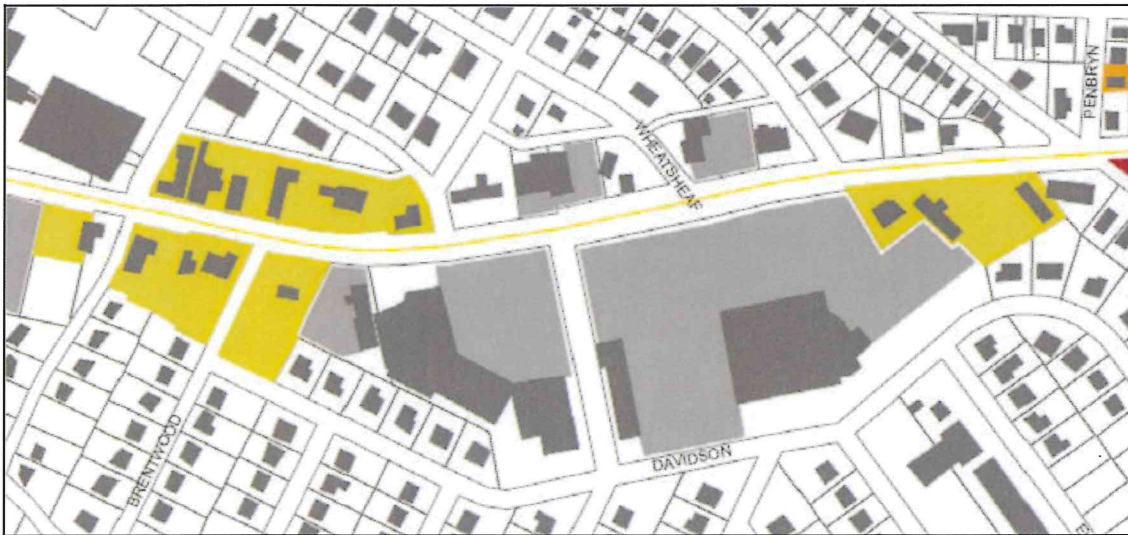
The principal constraint on the Institutional Cluster is the relative lack of vacant or underutilized land and buildings that could provide space for upgrading or expanding institutional services and facilities. There are two underutilized sites in the cluster that could provide a redevelopment opportunity: the commercial properties at the northwest corner of Old York Road and Susquehanna Road and the Meals-on-Wheels site on the east side of Old York Road near Brentwood Road. The property on the northwest corner of Susquehanna and Old York Road appears to be largely vacant above the ground floor. The building itself encroaches on the sidewalk, making pedestrian movement

extremely unsafe. Although the site is highly visible, the occupancy does not substantially contribute to the economic activity in the cluster or to the overall economy of the township. Considering its strategic location between the YMCA and the Municipal Building and Abington Memorial Hospital, it should be considered for redevelopment that would be more in context with existing institutional uses in the cluster. Similarly the Meals-on-Wheels facility, while an important contributor to the wellness of the community, occupies a small portion of a strategically located site. In addition, some of the existing commercial uses between Keith Road and Highland Road could ultimately give way to expanding institutional activities, allowing a greater concentration of institutional facilities which would be the highest and best use of real estate in the cluster.

COMMERCIAL CORE CLUSTER

■ ASSETS

Despite the presence of the Willow Grove Mall and other large strip centers and power centers in Willow Grove immediately north of the study area, the existing retail inventory in the study area offers a convenient mix of shopping goods, convenience goods, and restaurants. As reported earlier, sales in the convenience goods stores in the study area are far higher than could be supported by expenditures from local consumers, most likely due to the presence of two national gourmet food store chains (Whole Foods and Trader Joe's). Undoubtedly the Giant Supermarket and Rite Aid located in the Abington Town Center contribute to the strong



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-15: COMMERCIAL CORE CLUSTER



performance of convenience goods retailers in the study area as a whole.

In the shopping goods category stores selling department store type merchandise such as clothing and accessories, furniture and miscellaneous items such as jewelry, books and sporting goods compete comparatively well with the regional shopping destinations in Willow Grove. Stores like Target, T.J. Maxx and Jennifer Convertibles located in the Commercial Core Cluster attract customers for several reasons, as expressed in focus groups conducted prior to the preparation of this report: (1) the stores in the Commercial Core Cluster are particularly convenient to major employers such as the Abington Memorial Hospital and Penn State Abington; (2) many shoppers prefer the neighborhood ambiance of retail facilities like the Abington Shopping Center and Abington Town Center, and shun the crowds and parking problems associated with larger retail malls like Willow Grove Mall; and (3) local stores open much earlier than shops in the mall, again improving the convenience factor.

Expanding the commercial mix and selection of stores could enhance the shopping experience, reduce the number of shopping trips to the major malls just outside of Abington, and better serve local residents. However, there is a fine line between increasing the selection of stores in the Commercial Core Cluster and maintaining the convenience factor. For example, increasing the number of stores could also result in an increase in traffic on Old York Road, disrupting the convenience. Nonetheless, the Commercial Core Cluster plays an important role in the economic life of the township by providing a convenient and diverse shopping experience that makes Old York Road a major center of economic activity.

■ CONSTRAINTS

Unfortunately there is little or no vacant land in the Commercial Core Cluster, which could limit any attempt to increase commercial activity in the area or to develop a mix of uses that could

help create a “town center” pedestrian-friendly environment that was expressed as a goal by some participants in the focus groups.

However, there are several underutilized sites at the edges of the Commercial Core Cluster that could be redeveloped to accommodate commercial growth or to provide an opportunity for introducing a broader mix of uses into the cluster. At the north end of the cluster just south of the Edge Hill Road overpass is a car wash and Thai Thanee Restaurant. These two sites are among the highest elevations in the study area corridor and could be combined with surface parking in the vicinity of Jennifer Convertibles and the Abington Town Center to permit the expansion of retail uses and/or the development of other commercial and residential uses.

A similar opportunity exists at the south end of the cluster overlapping with the Institutional Cluster, more specifically the Meals-on-Wheels site and adjacent vacant lot at the intersection of Old York Road and Brentwood Road. Like the car wash and restaurant sites, the Meals-on-Wheels site is located at a high point in the corridor, offering excellent visibility to employees, shoppers and visitors traveling through the corridor – visibility that could help re-brand the Commercial Core Cluster as Abington’s town center.

Depending on the financial feasibility of reconfiguring the parking lot and the one-story out-parcel in the Abington Town Center that currently houses Firestone, Slom’s Uniforms, Payless Shoes and Subway, among others, this site could also be considered as an opportunity to increase the retail inventory in the cluster and perhaps add some residential units to the mix.

DINING AND ENTERTAINMENT CLUSTER

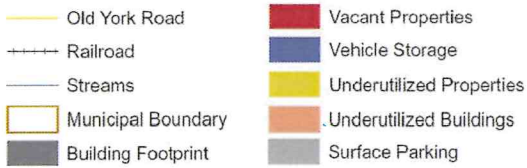
■ ASSETS

As noted above, the segment of Old York Road between Edge Hill Road in the south



Old York Road Corridor Improvement Study, Abington Township

FIGURE 3-16: DINING AND ENTERTAINMENT CLUSTER



and Moreland Road in the north contains a substantial concentration of eating and drinking places, including national fast food restaurant chains. Despite the concentration of restaurants along Old York Road, eating and drinking sales in the study area as a whole are relatively low compared to the buying power of local residents. Overall, the current inventory of restaurants in the study area captures only 43 percent of the available household expenditures for dining out (categorized by the U.S Department of Labor’s Consumer Expenditure Survey as food away from home). Given the buying power of local residents for food away from home, together with potential spending by employees in the study area at sit-down and take-out restaurants, there appears to be an opportunity to expand the number of restaurants in the Dining and Entertainment Cluster and increase the capture of food away from home expenditures.

Increasing the number of restaurants in the cluster would help promote the image of the area

as a dining destination, and at the same time retain a greater portion of the local spending power for food and beverages, as well as other retail goods. To help brand the cluster as a dining destination local entertainment opportunities could also be expanded to increase the diversity of activities in the area. Entertainment uses could include small performance venues, galleries, artist live/work studios or a small independently owned movie theater that would be attractive to local residents and to students at the nearby Penn State Abington Campus. In fact, the cluster could become the focus of a university arts district where cultural programs are more closely integrated into the community life of the township.

Unlike the other opportunity clusters where vacant and underutilized property is in short supply, the Dining and Entertainment Cluster contains a number of vacant parcels, several of which are adjacent to each other and could provide a larger redevelopment opportunity.

For example, there are four adjacent properties on the east side of Old York Road between Maplewood Road and Moreland Road that could offer a significant redevelopment opportunity, including the former Rockaway Bedding Store, Verizon Wireless Store, Midas Muffler Shop and Arthur Murray Dance Studio. Two additional vacant parcels are located in the adjacent block south between Maplewood Road and Parkview Road. The corridor's largest vacant parcel is located on the west side of Old York Road between Tremont Road and Rubicam Road, in the immediate vicinity of Boston Market, Bonnet Lane Restaurant, and Rita's Restaurant. This site is currently under contract to be redeveloped as a La-Z Boy furniture store, but would offer an excellent opportunity for mixed-use development that would enhance the attraction of the Dining and Entertainment Cluster. There are several other vacant properties on the east side of Old York Road in the vicinity of the proposed La-Z Boy site that would help create a concentration of redevelopment opportunities in the Dining and Entertainment Cluster.

■ CONSTRAINTS

There are two key constraints on redevelopment opportunities in the Dining and Entertainment Cluster: (1) the relatively narrow depth of many of the properties, and (2) the close proximity of residential uses adjacent to the narrow parcels fronting on Old York Road. The narrow depth of the properties in the cluster could limit the type of redevelopment to smaller retail, commercial and residential uses, requiring additional density and higher building heights to make redevelopment economically and financially feasible. Increased density would permit ground floor retail and commercial uses and required off-street parking, while upper levels could accommodate additional retail and commercial space or residential uses. 