



EXISTING CONDITIONS REPORT

TOWNSHIP OF
CHERRY HILL, NJ

DRAFT: 02/14/18



Plan Prepared by

GROUPmelvinDESIGN

In consultation with,

URBAN
PARTNERS



0. STRUCTURE

The Existing Conditions Report is a document that serves as a preface to goals and recommendations established in the Cherry Hill Master Plan update (2018). The report is structured to impart a clear picture of the Township, where it stands today, and how it got there. A quick reference guide (p.II-VII) is provided for document navigation.



QUICK REFERENCE GUIDE

The following is a quick reference guide to help users navigate this Existing Conditions Report.

I. DEMOGRAPHICS (P.1)

An explanation of demographic patterns and building trends that have shaped Cherry Hill Township over time, such as the effects of the suburbanization of America, and the great American shopping mall.

1. INTRODUCTION (P.2)

Provides a brief description of the evolution of Cherry Hill Township from its agricultural roots through to the present day.

2. AGRICULTURAL BEGINNINGS (P.2)

Describes the impact of agricultural land use and ownership on the initial development patterns of the township.

3. A QUINTESSENTIAL SUBURB (P.2)

Identifies three eras of residential construction in Cherry Hill Township, resulting in its current suburban-style development.

EARLY CONSTRUCTION BOOM (P.2)

Describes land development impacts produced by the construction of the Ben Franklin Bridge.

POST-WAR BOOM (P.4)

Describes the development boom between 1940 and 1980 where over 70% of Cherry Hill's housing was constructed, spurred by the construction of new highways and federal subsidization of suburban single-family home construction.

PEAK GROWTH (P.4)

Expounds upon findings that peak population growth has likely already occurred, and future growth is expected to be a fraction of what it once was.

4. A COMMERCIAL DESTINATION (P.7)

Illustrates the impact of commercial development on the built environment of Cherry Hill Township.

SHOPPING AND ENTERTAINMENT (P.7)

Describes the emergence of Cherry Hill as an entertainment destination, bolstered by the Garden State Park racetrack.

THE MALL (P.7)

Shows the importance of the Cherry Hill Mall, once seen as the "heart of Cherry Hill", in shaping growth in the township.

OFFICE GROWTH (P.8)

Demonstrates the role of the township as a regional job hub.

5. A PLACE OF STABILITY (P.9)

Describes the ability of the township to maintain stable conditions over time in areas meaningful to quality of living, such as education and housing opportunity.

EDUCATION AND EMPLOYMENT (P.9)

Reveals the high levels of educational attainment achieved by residents of Cherry Hill, particularly compared to the region, and how this translates to employability and household incomes.

HOUSING (P.10)

Describes the stability of the housing stock in the township over time, including housing availability and affordability.

REGIONAL ACCESS (P.10)

Builds upon the understanding of Cherry Hill as a classic suburb - accommodating large numbers of inflow/outflow as residents and workers travel from origin to destination. Further discusses access to Philadelphia as a key factor for the township.

RATABLES (P.10)

Describes the continued ability of Cherry Hill to attract ratable development, such as commercial centers, providing a local revenue stream for the township.

6. CHANGE (P.12)

In contrast to elements that have remained roughly the same over time, such as education, this section defines the elements in the township which are undergoing change, such as household structures.

HOUSEHOLDS (P.12)

Describes the decrease in size of the average household in Cherry Hill, as well as a significant shift in median age, trending towards a larger retirement age population.

RACE & ETHNICITY (P.12)

Notes the diversification of residents, beginning approximately in 1980, highlighting the importance of new residents in Cherry Hill, which offsets the net decrease in white and native-born residents.

II. MARKET ANALYSIS (P.15)

An explanation of both local and national economic trends, and their impact on the market in Cherry Hill Township.

1. STRUCTURE OF THE CHERRY HILL ECONOMY (P.16)

Illustrates both the economic structure of the township, as well as compares individual employment concentrations over a period of time.

TOWNSHIP-WIDE ECONOMIC STRUCTURE (P.16)

Records the economic structure of the township through an analysis of concentrations of employment within Cherry Hill, further

articulated by an analysis of employment by job sector.

KEY EMPLOYMENT NODES (P.18)

Summarizes the concentration of employment in Cherry Hill into four distinct nodes, each individually analyzed by employment sectors:

- **Kings Highway/Chapel Avenue Area (p.20)**
- **I-295 Industrial Area (p.21)**
- **Golden Triangle/Cherry Hill Mall Area (p.22)**
- **Ashland/Woodcrest Area (p.23)**

2. COMMERCIAL CORRIDORS (P.24)

Highlights the importance of commercial corridors in Cherry Hill, which function as regional commercial spines, and analyses three use and roadway frontage conditions that are found along primary corridors.

BACKGROUND AND EXISTING CONDITIONS (P.24)

Describes the role of key corridors in the perception of Cherry Hill Township and the following frontage characteristics:

- **Large Developments (p.24)**
- **Non-commercial Uses (p.24)**
- **Individual Homes (p.24)**
- **Commercial Frontage (p.24)**

OPPORTUNITIES & CHALLENGES WITH COMMERCIAL FRONTAGE PROPERTIES (P.24)

Discusses the key benefits and challenges relating to both long-term and recent investments in commercial frontages in five types of uses:

- **Large Single Use Facilities (p.24)**
- **High-value Freestanding Retail Facilities (p.24)**
- **Smaller Strip Shopping Centers (p.25)**
- **Individual Commercial Properties/Automotive Service Uses (p.25)**
- **Automotive Dealership Frontages & Car Storage (p.25)**

AREAS IN NEED OF REVITALIZATION (P.25)

Illustrates the clustered nature of areas that may require revitalization/rejuvenation along major commercial corridors:

- **Route 70 Between Union Avenue & Hampton Rd (p.25)**
- **Rt 38 Between Longwood Avenue & Haddonfield Road (p.26)**
- **West Side of Haddonfield Road North of Route 38 (p.26)**
- **Erlton Shopping Center (p.26)**

SUMMARY OF OBSERVATIONS (P.27)

Highlights specific recommendations for improving the look and feel of commercial corridors throughout Cherry Hill Township, specifically general corridor appearance, automotive facilities, and efficient commercial development.

3. COMMERCIAL MARKET TRENDS (P.27)

Addresses trends that are currently impacting Cherry Hill's office and retail markets, based on findings from WCRE.

OFFICE MARKET (P.27)

Describes the active office market in the township, and expands upon possible future vacancies which will bolster the investor/sales market.

RETAIL MARKET (P.27)

Discusses the current strength of the retail market in Cherry Hill, as well as potential future implications due to the growth of e-commerce.

4. TAX BASE TRENDS (P.29)

Assesses the strengths and weaknesses of the Cherry Hill economy as expressed by the tax base. Further examines the tax base through the three largest components: single-family residential property, apartments, and commercial/industrial property.

5. STATE TRENDS AND THE CHERRY HILL ECONOMY (P.30)

Provides a comparison between the local economy and the economy of the State of New Jersey as a whole.

CHERRY HILL COMPARED TO NEW JERSEY GROWTH TRENDS (P.30)

Identifies specific economic conditions of interest. These conditions highlight sectors where activity in Cherry Hill Township differed from activity on the state-level.

Provides a discussion of three distinct conditions which should be taken into consideration when discussing future economic strategy in Cherry Hill.

NEW JERSEY STATE ECONOMIC GROWTH TRENDS (P.31)

Highlights two recent analyses of the New Jersey economy which should be used to inform economic strategy in the township.

Discusses four state economic conditions which should be monitored, and potential reactions for the township.

6. METROPOLITAN AREA FORECASTS (P.32)

Introduces two key regional planning documents: CONNECTIONS 2040 and Greater Philadelphia FUTURE FORCES, both prepared by DVRPC.

Showcases seven conclusions which may be drawn from regional economic forecasting, as they relate to Cherry Hill Township.

This section compounds all prior economic analysis to present ten factors that impact Cherry Hill's future.

7. CONCLUSIONS: ECONOMIC OPPORTUNITIES AND CHALLENGES (P.41)

Provides a discussion on the economic opportunities or challenges within the context of employment and market trends.

OPPORTUNITIES (P.41)

Presents a number of economic opportunities within the township:

- **Cherry Hill Train Station (p.41)**
- **Cherry Hill Mall (p.41)**
- **Visible Commercial Corridors (p.41)**
- **Key Redevelopment Sites (p.42)**
- **University Satellite Campus (p.42)**

CHALLENGES (P.43)

Presents a number of economic challenges faced by the township:

- **Industrial Park (p.43)**
- **Township Identity (p.43)**
- **Car Dealerships (p.43)**
- **Zoning (p.43)**

III. LAND USE & ZONING (P.45)

An explanation of the current land uses within the township, and the key issues faced by the township related to land use and zoning.

1. LAND USE (P.46)

Discusses how historical and modern land uses have shaped Cherry Hill.

LAND ALLOCATION (P.46)

Reveals current patterns in land use allocation by use types, such as residential and industrial.

SEPARATION OF USES (P.46)

Provides a discussion as to why land uses tend to be separated within the township, such as the large swaths of the township developed under post-war suburban principles.

COMPARISON TO CAMDEN COUNTY (P.48)

Expands upon the key land use differences between the township and the county, particularly for residential land uses and open space.

2. KEY LAND USE NODES (P.48)

Provides an analysis of five key nodes within Cherry Hill that will require special attention as land use recommendations begin to be made. The nodes are:

- **THE GOLDEN TRIANGLE (P.49)**
- **SPRINGDALE INDUSTRIAL AREA (P.51)**
- **ERLTON VILLAGE (P.52)**
- **KINGS HIGHWAY OFFICE PARK (P.53)**
- **CHERRY HILL MALL AND SURROUNDING COMMERCIAL AREAS (P.54)**
- **ROUTE 70 EAST (P.55)**
- **BATESVILLE TRIANGLE (P.56)**

3. ZONES (P.59)

Provides an understanding for how the zoning code is analysed for the purposes of the master plan--in relation to potential goals and objectives, and the administrative functionality of current standards and regulations. Further, it provides a basic review of specific zones which may pose challenges for the township.

Discusses the current zones which no longer function as intended for the Township, and details the conditions surrounding that disfunctionality.

INDUSTRIAL RESTRICTED ZONES (IR) IS TRANSITIONING AWAY FROM STRICT INDUSTRIAL USES (P.57)

Highlights the changing nature of industrial spaces in the Township, due to a number of exterior conditions and challenges:

- **Changing Market (p.59)**
- **New Users (p.59)**
- **Parking and Access (p.61)**
- **Wayfinding (p.61)**
- **Code Compliance (p.61)**

AREA ALONG CUTHBERT BOULEVARD
AND ROUTE 70 IS HINDERED BY REGIONAL
BUSINESS ZONE (B4) DESIGNATION (P.57)

Highlights the challenge to appropriately regulate sites zoned B4 that are adjacent to, but not a part of the Racetrack site, as the B4 zone was written specifically for the redevelopment of the racetrack.

THE B2 ZONE IS UBIQUITOUS ALONG
COMMERCIAL CORRIDORS AND DOES NOT
PROMOTE HIGH-QUALITY PLACES (P.60)

Discusses the placelessness associated with most major corridors in Cherry Hill Township, which by majority are zoned as B2.

THE PARKING STANDARDS OF THE B2 ZONE
PROHIBIT REUSE OF NON-CONFORMING
PRE-EXISTING USES (P.61)

Provides an discussion on the issues being faced in strip-shopping centers and other commercial uses, which must undergo parking evaluations when spaces convert to new uses.

5. ADDITIONAL ISSUES (P.61)

Discusses a number of additional issues that were discovered through an analysis of prior Annual Reports of Zoning Board Adjustments from 2012-2016:

6. ADMINISTRATIVE (P.63)

Discusses common zoning code administration issues encountered by planning staff.

THE CURRENT DEFINITIONS ARTICLE OF THE
ZONING REGULATIONS (ARTICLE II) LACKS
DEFINITIONS OF TERMS USED THROUGHOUT
THE ORDINANCE (P.63)

Presents the commonly cited problem of a lack of key terms in the definition section of the code.

THE CURRENT APPLICATION PROCESS FOR
ZONING PERMITS, AND THE APPLICATION
ITSELF, IS CONFUSING TO RESIDENTS, AND
PLACES A LARGE BURDEN ON PLANNING
STAFF (P.63)

Presents the key issues surrounding the “one-size fits all” application currently in use by the

township, particularly when encountered by laypersons.

IV. TRENDS AND CONSIDERATIONS (P.65)

Presents the major trends that may directly impact land use decisions moving forward.

1. THE FUTURE OF RETAIL (P.66)

Discusses the “ratables chase” that has driven commercial development in Cherry Hill.

Explains the unintended consequences of the ratables chase, particularly how it has resulted in traffic congestion and infringement on established neighborhoods.

Highlights the potential implications that a growing online market may have for brick and mortar retail, and thus commercial development.

Presents a number of the new retail models seen as retailers attempt to compete with the growing share of online sales.

Relates the shifts seen in the retail market to the on-the-ground realities which the township may face.

2. TRANSPORTATION COSTS (P.68)

Discusses the potential repercussions that rising transportation costs may have on the township, as it stands as a regional retail destination, but also, how rising costs will effect residents.

3. THE PHILADELPHIA RENAISSANCE (P.68)

Presents the catalytic development and redevelopment seen in Philadelphia, and posits how this may impact Cherry Hill Township.

Discusses the growth seen in the population of Center City Philadelphia, as more people move to the city to live.

Discusses new open space projects in the city which are bringing suburban-style amenities to the city.

Highlights 30th Street Station development project, which, if completed, could have a major impact on Cherry Hill, being directly connected via Amtrak.

Discusses the unknown impact that Philadelphia may have on Cherry Hill Township, either positive or negative.

Discusses how Cherry Hill may become a model sustainable suburb in the future, through implementing sustainability principles such as smart growth. “Roadmap to Our Future”

Discusses the lack of a true downtown in Cherry Hill, and the impact that this has on the community.

4. CAMDEN RISING (P.68)

Discusses the Economic Opportunity Act of 2013, which has brought major private investment into the City of Camden, the closest major city to Cherry Hill. Furthermore, this section discusses the positive and negative impacts this has had on Cherry Hill.

5. RISE OF THE MILLENNIAL (P.71)

Presents the need for Cherry Hill to provide an attractive environment for millennials in order to maintain its population.

6. EDS & MEDS (P.75)

Discusses the need for Cherry Hill to remain actively engaged with both the education and medical service industries, as they provide a large opportunity for growth in the future economically, but also function as an attractant for residents.

7. DRIVERLESS TRANSPORTATION (P.72)

Posits that driverless transportation may one day significantly benefit the attractiveness of suburban communities as employment nodes.

V. CONCLUSIONS (P.73)

Presents historic patterns, future trends and development considerations, and demographic shifts as influential in considering the future land use.

Relates historic land use patterns to current conditions in the township, and draws broad conclusions about possible next steps for the township, pertaining to issues such as housing mismatch, and commercial development and redevelopment.





I. DEMOGRAPHICS

This report is a discussion of the findings from a robust investigation into demographic patterns and trends. Information in this section will help the reader understand the history of Cherry Hill, how it has evolved over time, and the current opportunities and challenges that it faces.

1. INTRODUCTION

Cherry Hill, New Jersey (Map 1) is the epitome of the American Post-War suburb. From its humble roots as an agricultural crossroads, Cherry Hill emerged in the 20th century as *the* premier business, entertainment, and shopping destination of South Jersey. Today, over 70,000 residents call Cherry Hill home, and over 53,000 workers make their living in the Township.

Cherry Hill's quiet neighborhoods of reasonably priced homes with generous yards and setbacks, interspersed by modern strip malls, office parks, recreation centers, and open spaces, provided those leaving Philadelphia and Camden their slice of the American Dream. As the amount of developable land in Cherry Hill has dwindled over the past few decades, the township's population has plateaued and socioeconomic and housing indicators have remained stable. Although the Township is no longer growing, Cherry Hill has continued to evolve; it has become increasingly diverse, families and households have changed in size and structure, and its role in the Philadelphia metro region may be changing as Philadelphia reemerges as a desirable place to live.

In this time of stability and transformation, the township and its residents must face the exciting prospects of redevelopment, while maintaining the aspects of their community that have made Cherry Hill a great place to live and work.

2. AGRICULTURAL BEGINNINGS

The existing suburban fabric and regional significance of Cherry Hill are largely a result of the township's agricultural beginnings and close proximity to the cities of Philadelphia and Camden.

Cherry Hill's farmers enjoyed convenient connections to Camden's ferry terminals and ports. They also had access to Campbell's Soup factory, where a large portion of the township's produce was processed.

Unlike the neighboring communities of Haddonfield and Merchantville - with their centralized main streets and townhouse and business development - the early development of Cherry Hill occurred on large swaths of farmland held by single families and in small villages on the edges of these properties.¹

Figure 1. Holly Ravine Farm and Cowtail Dairy Bar, operated by former Cherry Hill mayor John Gilmour



Figure 2. Ben Franklin Bridge under construction (1924)



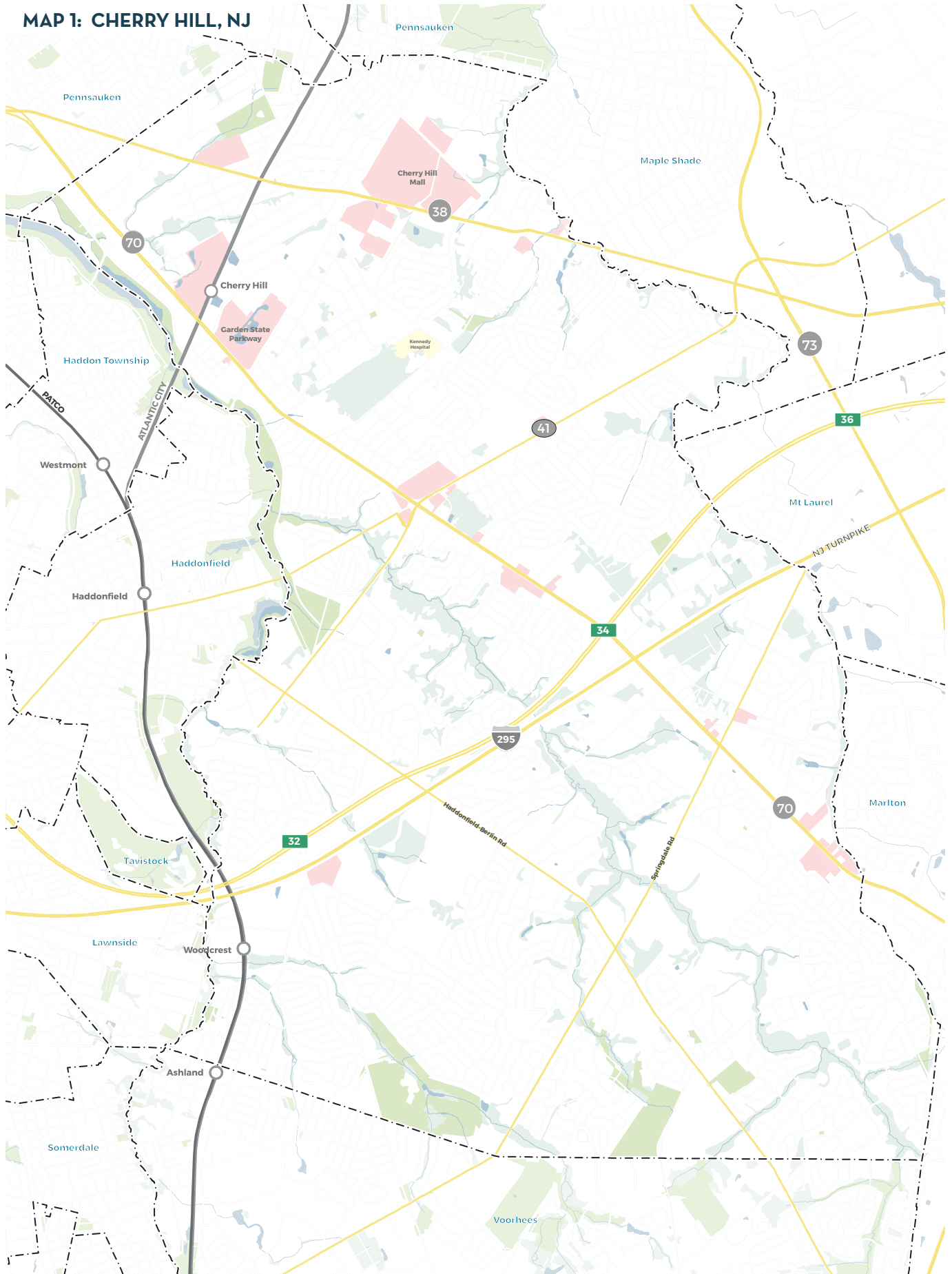
3. A QUINTESSENTIAL SUBURB

EARLY CONSTRUCTION BOOM

The first construction boom in Cherry Hill occurred quickly after the opening of the Delaware River Bridge, known today as the Benjamin Franklin Bridge, in 1926. With a new, effortless connection to Center City Philadelphia, and the proliferation of the automobile, the northwestern neighborhoods of Barlow and Woodland were parceled out and gradually developed, and the roads of the Erlton neighborhood along the Cooper River were laid out. Although these neighborhoods were within the township border, they functioned moreso as extensions of nearby Merchantville and Haddonfield. Development pressures in the township fell into a lull during World War II, while American soldiers around the world consumed the products of Cherry Hill's fields by way of Campbell's Soup rations.

¹ Cherry Hill: A Brief History, p. 15

MAP 1: CHERRY HILL, NJ



POST-WAR BOOM

In the Post-War years, returning servicemen and their families fled the dirty, crowded cities for greener pastures in the suburbs. **The population of Cherry Hill skyrocketed from 1950 to 1970 fueled by inexpensive land, the continued rise of the automobile, state and federal subsidization of new highway systems, and white flight from Philadelphia and Camden.** Between 1950 and 1960, the population tripled, and then doubled again between 1960 and 1970. (Figure 3) This boom corresponded to growth region-wide, although not nearly as significant as in Cherry Hill (Figure 4).

The expansive tracts of farmland that composed Cherry Hill provided the ideal canvases for rapidly developed suburban communities. Federal Housing Administration subsidized mortgages aimed specifically at suburban single-family homes made buying one's own home in Cherry Hill cheaper than renting in the city.²

As illustrated in Map 2, whole neighborhoods, such as Cooper Park Village, Old Woodcrest, and Windsor Park were constructed at the same time. By 1970, nearly all of the land west of the New Jersey Turnpike had been developed. (Map 2) As a result, **over 70% of Cherry Hill's housing units were constructed in the boom time between 1940 and 1980, and only 4% of the township remains as vacant land today.**

PEAK GROWTH

After decades of explosive population growth and rapid development, Cherry Hill has likely reached peak growth. Cherry Hill's population leveled off at 71,152 in 2014, growing only 1.7% since 2000. Over the next 25 years, the Delaware Valley Regional Planning Commission (DVRPC) projects that Cherry Hill will only grow 0.24%. (Figure 3)

POPULATION STATISTICS

Figure 3. Population growth and projections for Cherry Hill.

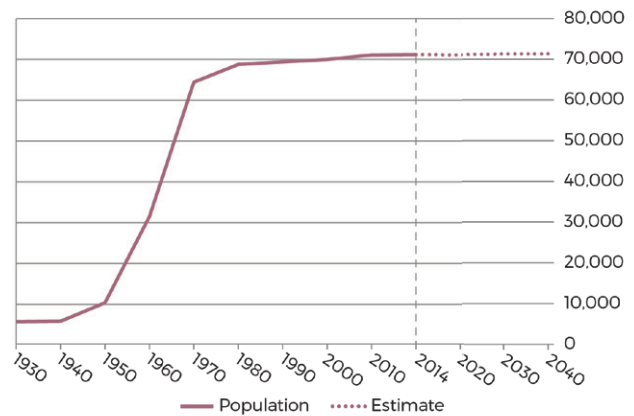
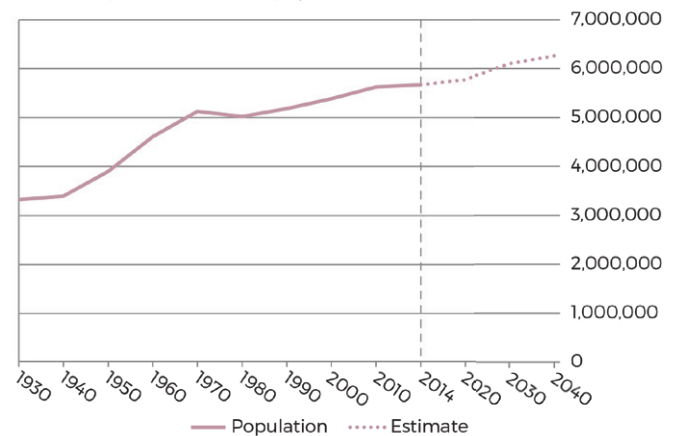


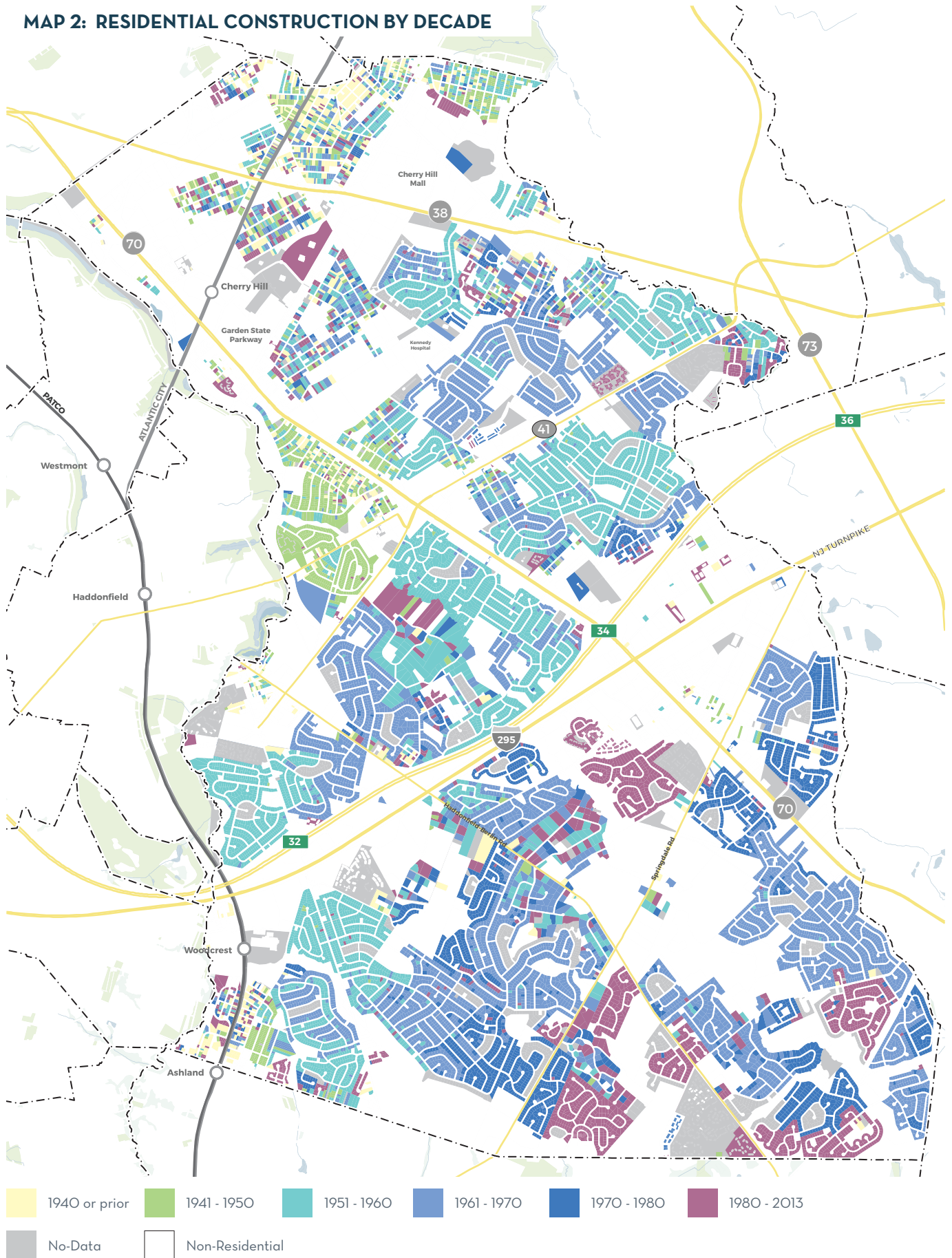
Figure 4. Population growth and projections for DVRPC Region.



Source: US Census

² Suburban Nation, p. 8

MAP 2: RESIDENTIAL CONSTRUCTION BY DECADE



SPOTLIGHT: DELAWARE VALLEY REGIONAL PLANNING COMMISSION



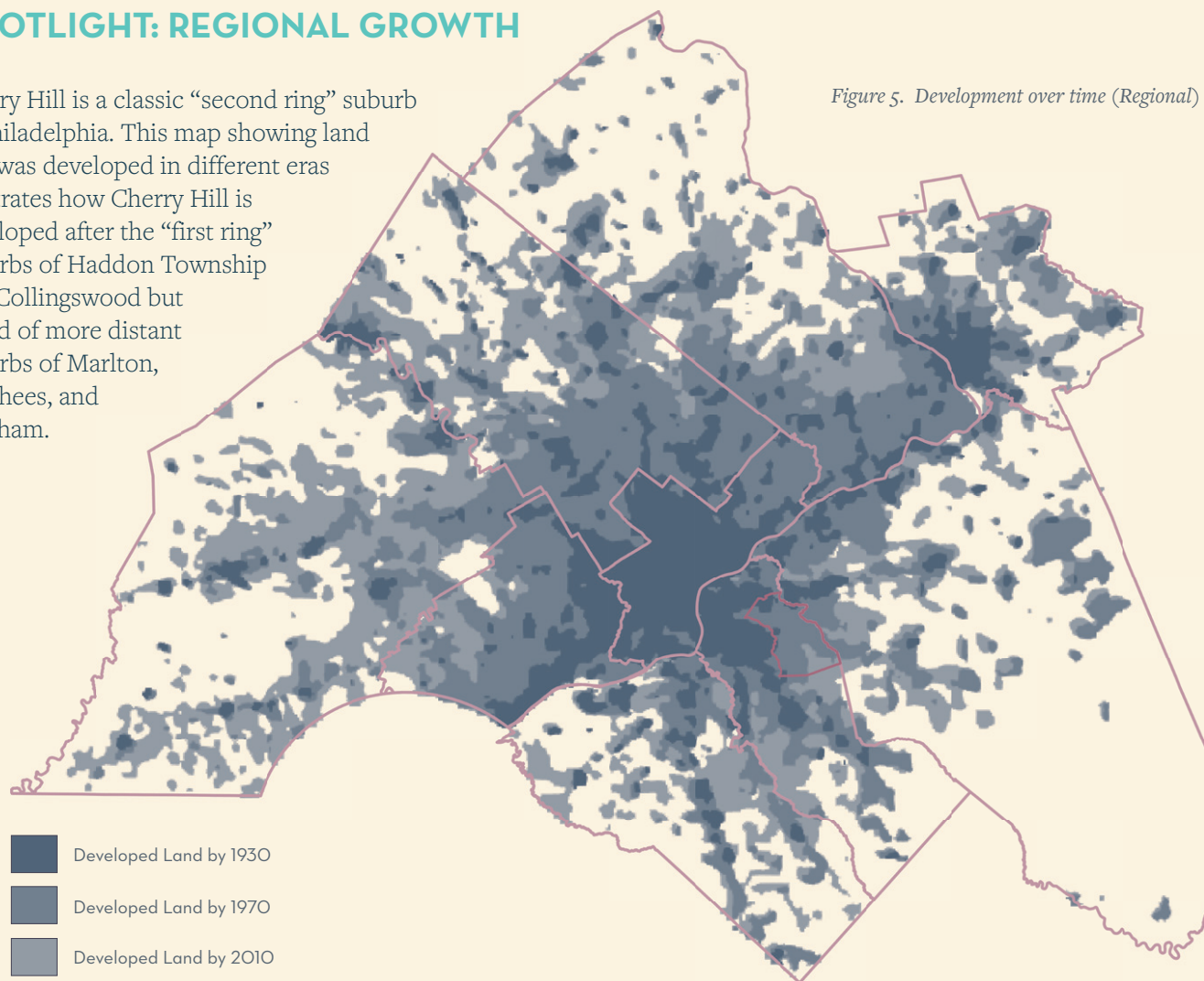
The Delaware Valley Regional Planning Commission (DVRPC) is the federally designated Metropolitan Planning Organization for the Greater Philadelphia Region. The DVRPC serves the following nine counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia in Pennsylvania; and Burlington, Camden, Gloucester and Mercer in New Jersey.

As the regional MPO, the DVRPC both collects and analyzes data for the nine counties, providing local planners with reliable data for analysis. This report uses DVRPC data, as well as US Census Bureau data, as part of the demographic analysis.

SPOTLIGHT: REGIONAL GROWTH

Cherry Hill is a classic “second ring” suburb of Philadelphia. This map showing land that was developed in different eras illustrates how Cherry Hill is developed after the “first ring” suburbs of Haddon Township and Collingswood but ahead of more distant suburbs of Marlton, Voorhees, and Evesham.

Figure 5. Development over time (Regional)



4. A COMMERCIAL DESTINATION

SHOPPING AND ENTERTAINMENT

Concurrent with the housing boom, Cherry Hill was quickly emerging as the premier entertainment, shopping, and business hub of South Jersey. After its opening in 1942, the Garden State Park racetrack became an instant success and provided steady tax revenue for the township.³ The success of the racetrack spawned commercial and residential development along Routes 38 and 70, including the popular Latin Casino nightclub, the Hawaiian Cottage restaurant, the Park City apartment complex (today known as Cherry Hill Towers), and the Cherry Hill Inn, which became South Jersey's number one convention center.

THE MALL

The opening of Cherry Hill Mall in 1961 was a seminal moment of the township's history. As the largest and most luxurious mall east of the Mississippi, and the first indoor mall in the Delaware Valley, the Cherry Hill Mall attracted shoppers and visitors from the entire East Coast.⁴ **The Mall also functioned as the heart of Cherry Hill, with summer concerts, Easter services, and even junior proms held in its gleaming halls and corridors.**

The success of the Cherry Hill Mall encouraged the construction of strip malls and shopping centers throughout the township, and cemented Cherry Hill as a regional retail destination. In the last quarter of the 20th century, many of the entertainment venues that had put Cherry Hill "on the map," including the Garden State Racetrack, the Cherry Hill Inn, and the Hawaiian Cottage Café were demolished in favor of new and expanding shopping centers. However, Cherry Hill's status as a regional destination remains in tact. Today, over 7,700 people work in Cherry Hill's retail sector, and another 4,250 work in accommodation and food services.

³ Cherry Hill: A Brief History, p. 51

⁴ Ibid p. 58

Figure 6. Historic image of the Garden State Park racetrack

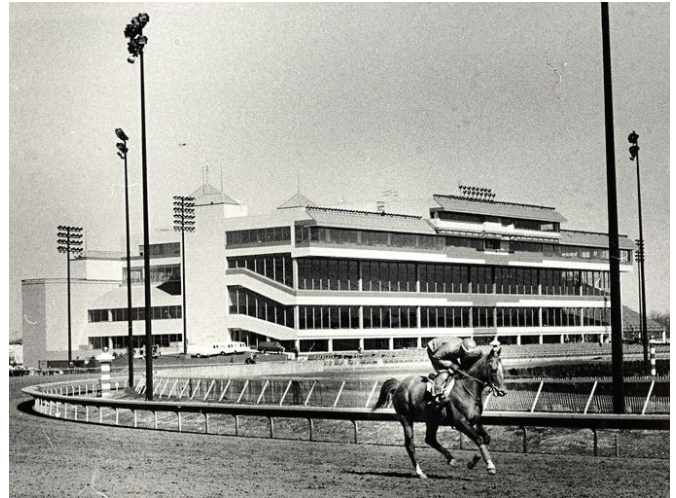


Figure 7. Cherry Hill Mall circa 1962

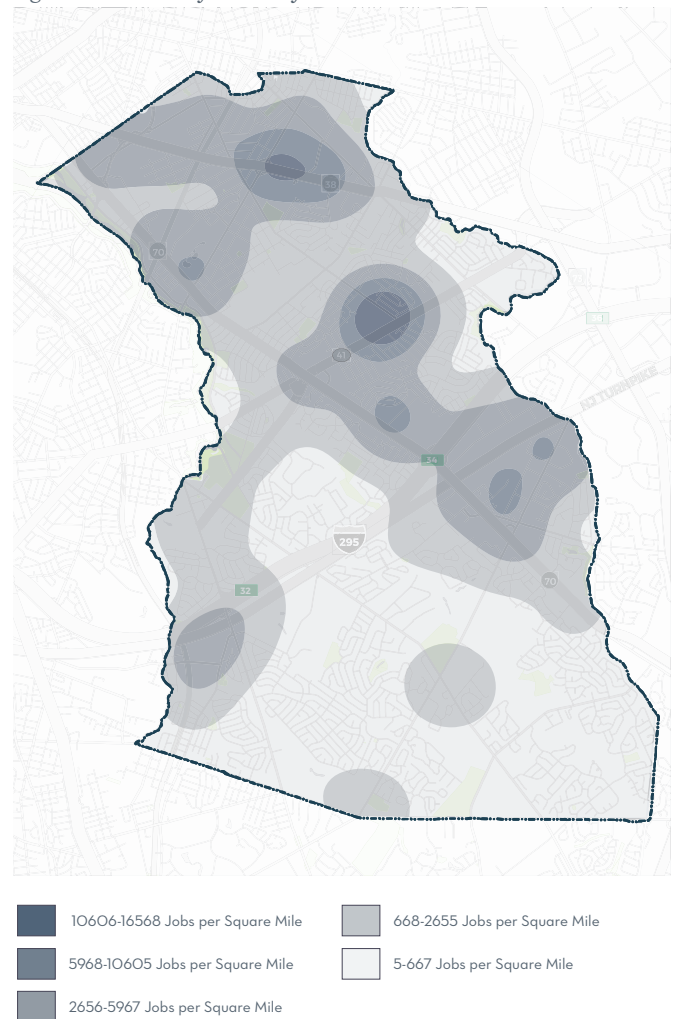


OFFICE GROWTH

Retail was not the only business attracted to Cherry Hill, however. As workers and executives left Philadelphia and Camden, and the tax structures of the cities became increasingly punitive, companies of all sorts rushed to the newly constructed office and industrial parks of Cherry Hill. **With 53,725 workers employed in the township in 2014, Cherry Hill is still the third largest job market in the entire Philadelphia-Camden-Wilmington Metropolitan Area, behind only Philadelphia and Upper Merion Township (King of Prussia), and contains nearly twice the number of jobs as Camden County's next largest employment center, the City of Camden.**

Jobs in Cherry Hill are dispersed throughout the township, but there are concentrations of workers along Route 41 near Chapel Avenue; just east of Route 70 and the New Jersey Turnpike's crossing; and around the Woodcrest PATCO Station near the Township's southeastern border. (Figure 8).

Figure 8. Job Density in Cherry Hill



5. A PLACE OF STABILITY

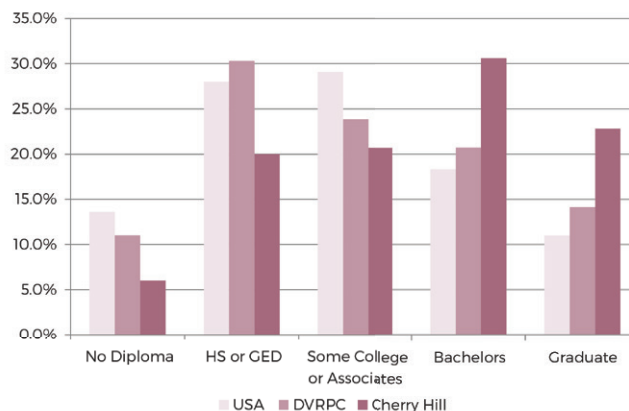
Despite monumental changes in land use and population size in the Post-War era, one of the most striking attributes of contemporary Cherry Hill is its stability. **Many of the features that made Cherry Hill an attractive place to live during the mid-20th century continue today.**

EDUCATION AND EMPLOYMENT

Cherry Hill continues to attract and retain educated residents. Township residents are more likely than those of the 9-county DVRPC region to possess a bachelor's degree or higher, and the proportion of Cherry Hill residents with a high level of educational attainment has steadily increased (Figure 9).

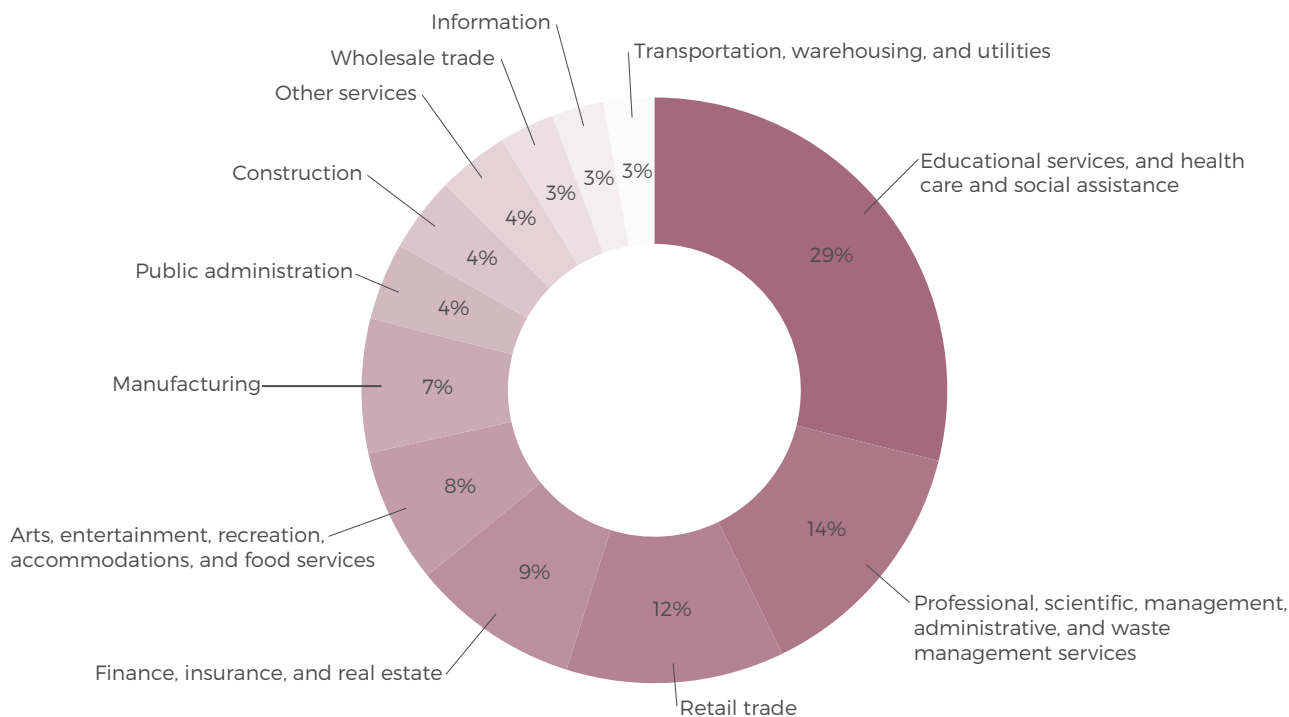
The educated and well-trained residents of Cherry Hill are employed in a wide range of industries (Figure 10) making them more resilient to economic downturns, and comfortable financially. The township has long been a desirable location for middle and

Figure 9. Education Attainment



upper-middle class households; **family and household median incomes have been higher than that of the region since at least 1980.** While the unemployment rate has mirrored regional trends and increased between 1990 and 2014, it remains below that of the region and the nation. The poverty rate for individuals has only increased by 1.6 percentage points since 1980, and remains at roughly one third that of the DVRPC area.

Figure 10. Employment By Sector



HOUSING

As mentioned above, the housing stock of Cherry Hill has remained largely stable over the past 50 years. **Only 5.3% of Cherry Hill housing units were constructed after 1999, and the majority of homes are 3-or-4-bedroom units. Only about 10% of housing units are 1-bedrooms or studios.**

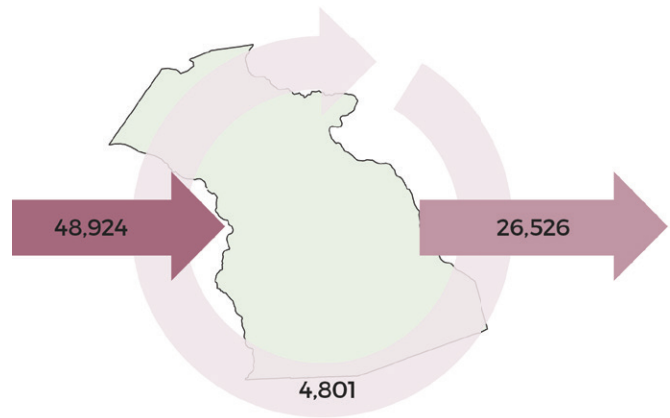
Median housing values have also remained stable. After adjustment for inflation, median housing value has remained in the mid-\$200,000 range since 1990, and Cherry Hill's median has remained squarely between high-end Haddonfield and more-affordable Pennsauken. While inflation-adjusted median gross rent has increased by about \$150 since 1990, Cherry Hill again maintains a solid position in the housing market between Haddonfield and Pennsauken.

With home values ranging from less than \$100,000 to over \$1,000,000, the neighborhoods of Cherry Hill continue to offer housing stock suited to a variety of household income levels. (Map 3) The neighborhoods to the East of the NJ Turnpike, which developed most recently, trend towards higher home values, with neighborhoods such as Wilderness Glen, Sienna, Short Hills Farms, and the Voken Tract offering homes with average values above \$500,000 and several homes valued above \$1,000,000. The Hunt Tract, adjacent to the Barclay Farms neighborhoods, share similar home values, though it is located on the opposite side of the NJ Turnpike. The neighborhoods with home values of \$250,000 or less, particularly those located on the southern edge and northwest portion of the Township, tend to be those neighborhoods which were earliest to develop, and represent some of the oldest, and smallest homes in the township. The Ashland neighborhood is a classic exemplar.

REGIONAL ACCESS

Stable job and housing opportunities within Cherry Hill have solidified the township as a place to both live and work, however it also functions as a classic suburb - many Cherry Hill residents do not work within the township and rely on personal and public forms of transportation to reach their destinations (Figure 11). Cherry Hill accommodates daily in/outflow on state and county roads, such as NJ 70, NJ 73, I-295, and the

Figure 11. Job inflow and Outflow



New Jersey Turnpike, and through public transportation systems such as the PATCO high speed rail and NJ Transit bus systems and commuter rail branch.

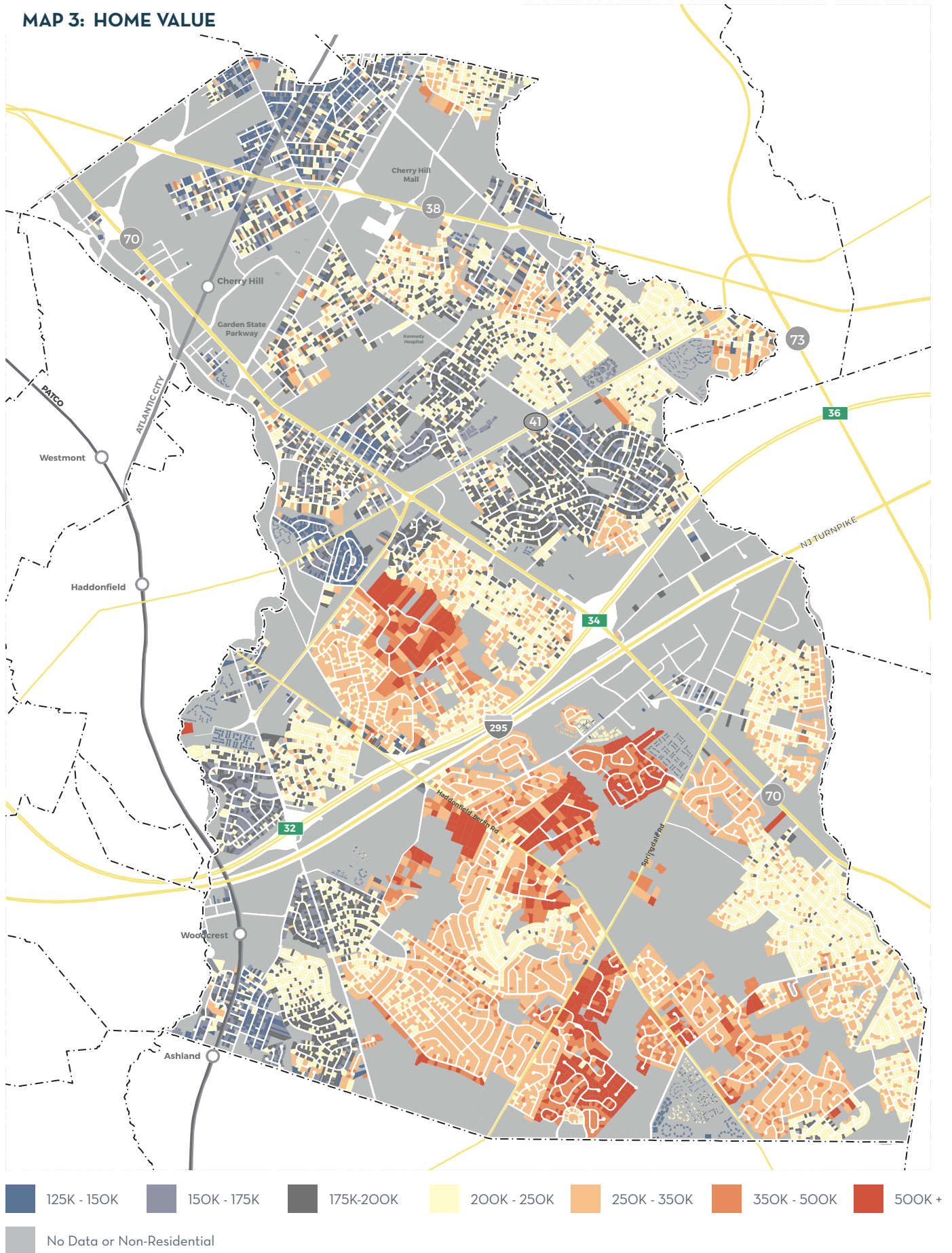
Cherry Hill's access to Philadelphia and the region is as good as it has ever been. The Ben Franklin Bridge, whose opening in the 1920s sparked the first wave of development in Cherry Hill, continues to serve as the township's primary connection to Philadelphia by car or PATCO high speed rail. Additionally, NJ Transit's Atlantic City commuter rail branch, provides a single-seat ride from Cherry Hill to Philadelphia's 30th Street Station District and seaside destinations. The New Jersey Turnpike and I-295 provide quick access to the rest of New Jersey and beyond.

The DVRPC Long-Range Plan has identified Cherry Hill as a Metropolitan Subcenter, a focal point for Smart Growth planning in the region, because of its strong access to multiple types of transportation. The township is in a strong position to strengthen their hold as a prime suburban community if transportation infrastructure improvements continue to allow manageable inflow and outflow to Cherry Hill.

RATABLES

Finally, **Cherry Hill maintains its advantageous ability to attract ratable development.** Just as the Garden State Park racetrack provided a revenue stream to fund township services and afforded some tax relief for homeowners in the 1940s, redeveloped shopping centers and new commercial developments continue to help maintain Cherry Hill's high quality of life.

MAP 3: HOME VALUE



DRAFT

6. CHANGE

Although the total population, socioeconomic indicators, and built environment have largely remained unchanged in Cherry Hill in recent decades, **the township is undergoing a number of exciting and important transformations.** Household and family size and structure in the township are changing in significant ways, the population is becoming increasingly diverse, gas and transportation costs are more unpredictable, and state and federal priorities have begun to shift away from the suburbs.

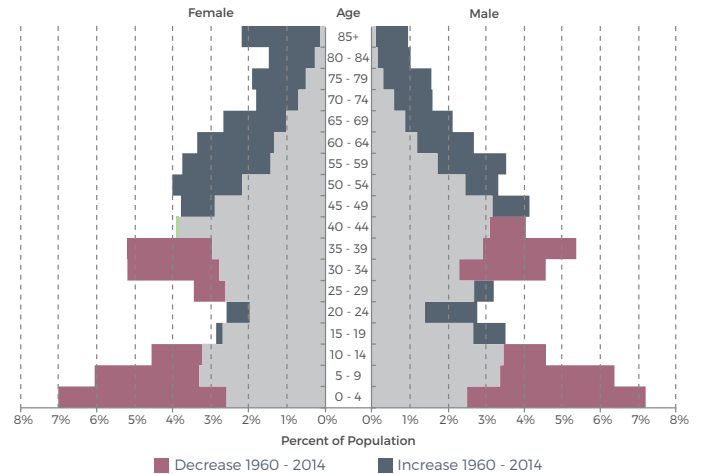
HOUSEHOLDS

The families and households that inhabit Cherry Hill are changing in size and structure. Mirroring national trends, median household and family sizes have decreased since 1980. There are fewer children and more elderly residents in Cherry Hill today than in earlier decades. **The median age of Cherry Hill residents has increased from 29 to 42 since 1970, and one quarter of the population has been living in their home for 25 years or longer.** Finally, **the number of single-person households (persons living alone) has grown by 36% between 1990 and 2014, while the number of households with 3 people or more have decreased.**

The median age of Cherry Hill residents has increased from 29 to 42 since 1970. As the population pyramid for Cherry Hill shows (Figure 12), there are significantly more retirement age people (over the age of 60) in Cherry Hill now than there were in 1980. Moreover, there are far fewer school aged children. The only population that has stayed relatively constant is the proportion of late career adults (those between 40 and 60).

While family size has decreased and the population ages in place, the housing stock, which is primarily 3-or-4-bedroom single family homes, has remained unchanged. For more information on the impact of changing household size see, “Spotlight: Is housing in Cherry Hill the right size for today and tomorrows population?”

Figure 12. Population Pyramid Comparison



RACE & ETHNICITY

While white residents still make up the majority of Cherry Hill, **the township has become much more diverse since 1980. Cherry Hill's growth since 1980 has largely been sustained by an influx of foreign-born residents, many of them from Asia.** Between 1980 and 2014, the township saw a net decrease of both white residents and native-born Americans, which was offset by new residents entering Cherry Hill.

Many of these relative newcomers are naturalized citizens, and over half of foreign-born township residents have a bachelor's degree or higher.

Figure 13. Cherry Hill Racial Makeup 2014 (Estimate)

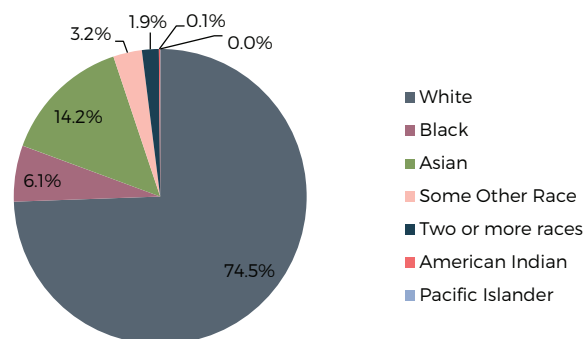
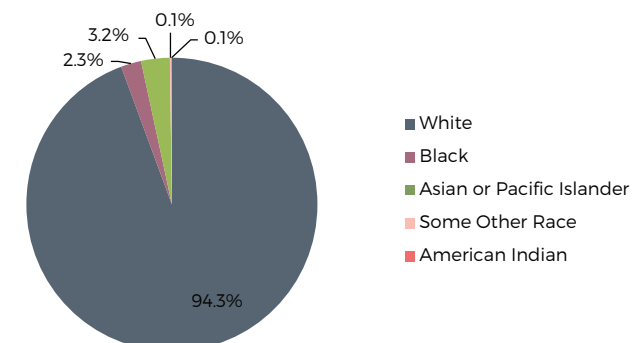


Figure 14. Cherry Hill Racial Makeup 1980



SPOTLIGHT: IS HOUSING IN CHERRY HILL THE RIGHT SIZE FOR TODAY AND TOMORROWS POPULATION?

Starting in 1970 things began to change in Cherry Hill. Between 1950 and 1970, the population of Chery Hill increased by more than 600%. After 1970, however, population growth dwindled as Cherry Hill ran out of developable land.

1970 was also an important year for Americans. According to the Pew Research Center, between 1940 and 1970, approximately 30% of Americans felt that four children was the ideal family size and an additional 25% said that three was the ideal size. However, **by 1971, there had been a shift in attitudes: Americans’ “ideal” family switched from four kids (19%) to two kids (38%), with a mean saying 2.9 kids was ideal.**¹

According to Pew this was likely due to a number of factors including, “the wide availability of the birth control pill in the 1960s; the growth of women’s participation in the workforce, which surged in the 1970s; and, of course, the increasing cost of raising a kid.”

The effect of this in Cherry Hill is striking. The residential fabric of the township was constructed in an era in which large families were expected. **Over 70% of Cherry Hill’s housing units were constructed in the boom time between 1940 and 1980.** However, as the “ideal” family size shrank, there was little opportunity to “right size” the housing stock.

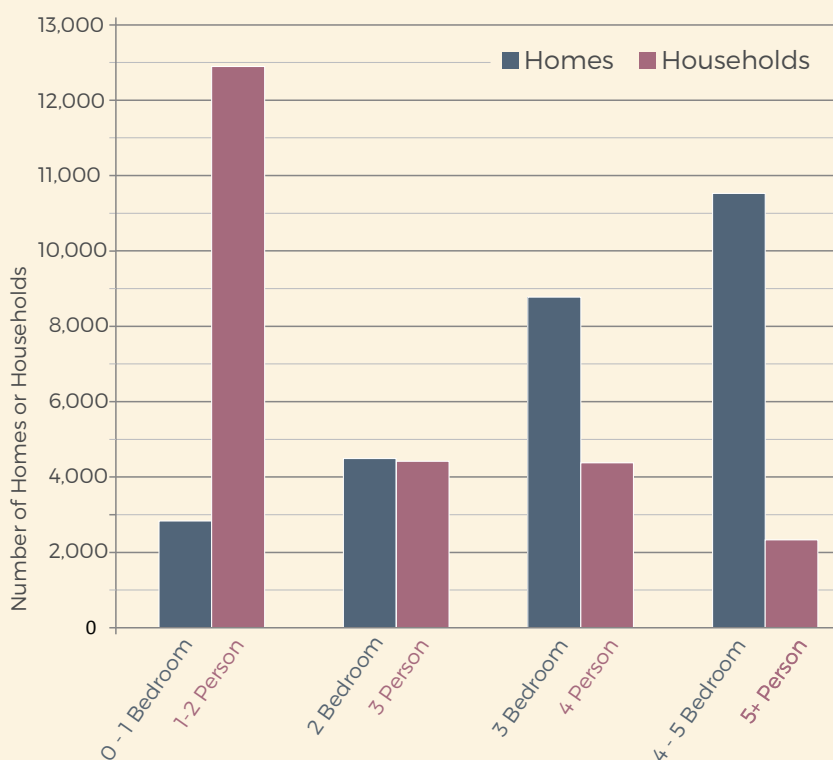
¹ George Gao, “Americans’ ideal family size is smaller than it used to be” May 8, 2015. pewresearch.org/

A comparison of household size and the number of bedrooms in Cherry Hill is presented in (Figure 14). There is no direct relationship between number of people in a household and their need for a certain number of bedrooms. A couple may only need one bedroom whereas a single parent and child may desire two. Equally, some families may use a second (or third) bedroom for an office. Nonetheless, figure 15 clearly illustrates **Cherry Hill has substantially more 3- and 4-bedroom homes than it has 3- and 4-person households to fill them. Conversely, there are many more 1- and 2-person households than there are studio, one, or even two bedroom units.**

The median age of Cherry Hill residents has increased from 29 to 42 since 1970 and that one quarter of the population has been living in their home for 25 years or longer. This indicates that many of these large homes are likely occupied by retirees and seniors who’s children have left the home and are now living on fixed incomes.

This analysis suggests there is a significant housing and household mis-match. In this instance, it is likely that smaller households have “too much home” and therefore excessive costs associated with homeownership.

Figure 15. Comparison of Household Size and Bedrooms/Home





CHERRY HILL

existing conditions report



II. MARKET ANALYSIS

Information within the market analysis section will help the reader understand the current economic climate of Cherry Hill, particularly as it relates to employment. This section also draws relationships between local and state economies, as well as national trends, and discusses current opportunities and challenges.

1. STRUCTURE OF THE CHERRY HILL ECONOMY

Cherry Hill Township's economy includes several high-performing industries both in terms of total employment and job growth. This employment is concentrated in distinct nodes throughout the township. To demonstrate the economic structure of the township and the individual employment concentrations, employment conditions and trends by industry sector have been examined and compared between 2002 to 2014 using the U.S. Census resource On the Map¹.

TOWNSHIP-WIDE ECONOMIC STRUCTURE

In Cherry Hill, employment covered by unemployment compensation grew by 18.1% between 2002 and 2014 to 53,725 jobs (see Figure 16)—growth significantly higher than New Jersey's growth rate of 6.6%.

Cherry Hill is a substantial center of employment concentration with 91% of the jobs being filled by people living outside of the township (see Figure 17). Only 15% of Cherry Hill's employed residents work in the township while 85% commute to surrounding areas for employment. These commuters most frequently travel for employment to Burlington County (19%), Philadelphia (17%), Camden City (5%), and Camden County jurisdictions other than Cherry Hill Township and Camden City (14%).

¹ On the Map is an online mapping application that identifies where people work and where workers live. This employment data is derived from payroll tax (unemployment insurance) payment records maintained by each state. This data excludes any employee for which unemployment insurance is not filed, any self-employed person who is not part of an unemployment insurance program, and any military personnel. As a result, labor force totals differ between On the Map and PolicyMap data sources.

Figure 16. Total Primary Jobs in Cherry Hill Township

	2014		2008		2002	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	53,725	100.0%	50,625	100.0%	45,472	100.0%

Source: OntheMap: U.S. Census, Center for Economic Studies

Figure 17. Employment Inflow/Outflow in Township (2014)

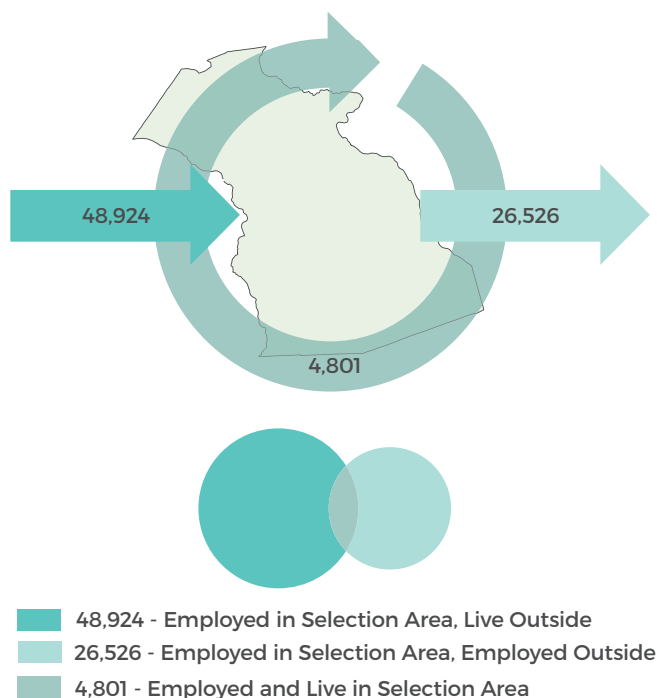


Figure 18. Inflow/Outflow Job Counts (Primary Jobs, 2014)

	Count	Share
Employed in Selection Area	53,725	100.0%
Employed in Selection Area but Living Outside	48,924	91.1%
Employed and Living in the Selection Area	4,801	8.9%
Living in the Selection Area	31,327	100.0%
Living in the Selection Area but Employed Outside	26,526	84.7%
Living and Employed in the Selection Area	4,801	15.3%

Source: OntheMap: U.S. Census, Center for Economic Studies

Two-thirds of Cherry Hill employment in 2014 was in five sectors (see Figure 18):

- Administration & support (9,300 jobs—17.3%);
- Health care & social assistance (8,900 jobs—16.6%);
- Retail trade (7,700 jobs—14.4%);
- Professional, scientific & technical services (5,600 jobs—10.5%); and
- Accommodations and food services (4,300 jobs—7.9%).

The largest sector in 2014 (“Administration & Support, Waste Management, & Remediation”) included 9,300 workers (17.3% of employment). Major components of this sector in Camden County are temporary employment agencies (46% of the sector); janitorial services to buildings (11%); security services (7%); collection agencies (7%); office administrative services (5%); and landscaping (5%).

Between 2002 and 2014, Cherry Hill gained 8,300 jobs. Six sectors grew substantially:

- Administrative & support gained 4,500 jobs;
- Health care & social assistance gained 2,500 jobs;
- Professional, scientific & technical services added 1,000 jobs;
- Accommodations and food services added 1,000 jobs;
- Management services gained 900 jobs; and
- Retail trade added 700 jobs.

Conversely, some employment sectors lost jobs between 2002 and 2014. The Information and Wholesale Trade sectors each lost 1,000 jobs. The Information sector comprises establishments engaged in producing and distributing information such as publishing industries (including software), broadcasting industries, telecommunications industries, and internet service providers. During the same period, the Finance and Insurance sector lost 362 jobs.

Figure 19. Jobs by Industry Sector

	2014		2008		2002	
	Count	Share	Count	Share	Count	Share
Administration & Support, Waste Management and Remediation	9,310	17.3%	5,326	10.5%	4,877	10.7%
Health Care and Social Assistance	8,934	16.6%	7,162	14.1%	6,414	14.1%
Retail Trade	7,739	14.4%	7,327	14.5%	7,003	15.4%
Professional, Scientific, and Technical Services	5,621	10.5%	4,641	9.2%	4,606	10.1%
Accommodation and Food Services	4,266	7.9%	3,642	7.2%	3,222	7.1%
Finance and Insurance	2,760	5.1%	3,678	7.3%	3,122	6.9%
Educational Services	2,567	4.8%	2,660	5.3%	2,487	5.5%
Manufacturing	2,446	4.6%	1,886	3.7%	2,414	5.3%
Other Services (excluding Public Administration)	1,712	3.2%	1,436	2.8%	1,499	3.3%
Public Administration	1,465	2.7%	2,005	4.0%	1,661	3.7%
Construction	1,376	2.6%	1,826	3.6%	1,521	3.3%
Information	1,374	2.6%	3,791	7.5%	2,417	5.3%
Wholesale Trade	1,129	2.1%	2,902	5.7%	2,127	4.7%
Management of Companies and Enterprises	979	1.8%	377	0.7%	45	0.1%
Real Estate and Rental and Leasing	755	1.4%	829	1.6%	879	1.9%
Transportation and Warehousing	709	1.3%	532	1.1%	548	1.2%
Arts, Entertainment, and Recreation	570	1.1%	532	1.1%	448	1.0%
Utilities, Agriculture, and Mining	13	0.0%	100	0.2%	215	0.5%
Total	53,725		50,625		45,475	

Source: OntheMap: U.S. Census, Center for Economic Studies

KEY EMPLOYMENT NODES

Cherry Hill's employment is largely concentrated in four nodes (see Figure 20): the Kings Highway/Chapel Avenue area, the Interstate 295 industrial area, the Golden Triangle/Cherry Hill Mall area (including Garden State Park), and the Ashland/Woodcrest area. An analysis of these areas identifies how each node contributes to the township's overall economic structure.

In 2014, nearly 80% of Cherry Hill's employment was located in these four nodes (see Figure 21). Three of the four employment nodes had a stand-out single industry sector in 2014 representing a quarter or more of jobs in those locations. In the King's Highway/Chapel Avenue area, the administration & support industry employed the most workers, representing 63.5% of all jobs in that node and 50.2% of all administration & support jobs in the township.

The Golden Triangle/Cherry Hill Mall area had the greatest number of total jobs among the nodes (20,142 jobs—37.5% of the township total).

Figure 20. Employment Concentrations (2014)

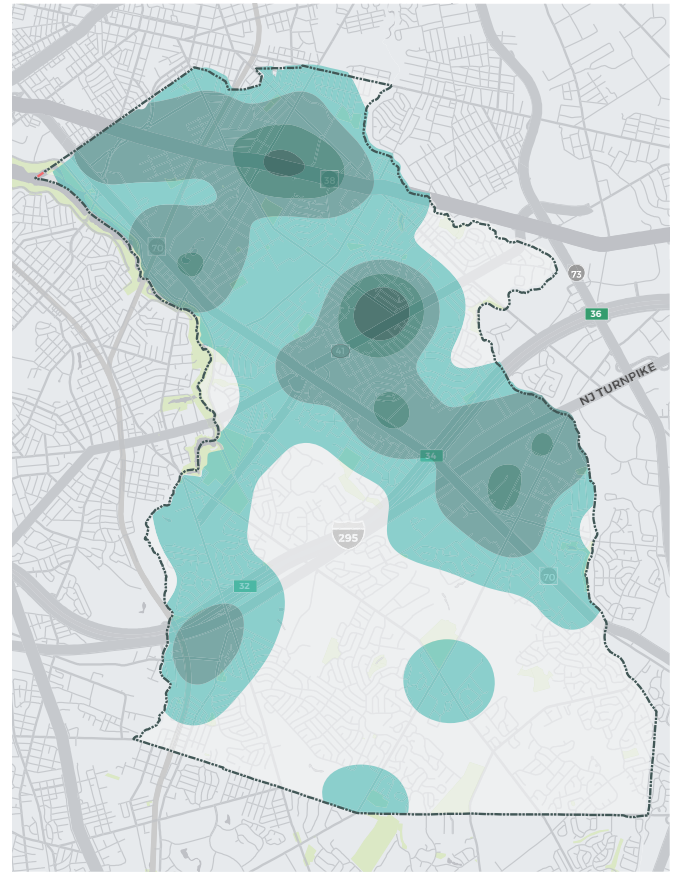



Figure 21. Jobs by Industry Sector (2014)

	2014 Count	King's Highway	I-295 Industrial	Cherry Hill Mall	Ashland/ Woodcrest	Other
Administration & Support, Waste Management and Remediation	9,310	4,678	1,573	2,209	438	412
Health Care and Social Assistance	8,934	920	1,954	2,949	197	2,914
Retail Trade	7,739	95	691	5,191	315	1,447
Professional, Scientific, and Technical Services	5,621	898	925	1,480	1,199	1,119
Accommodation and Food Services	4,266	52	167	2,775	125	1,147
Finance and Insurance	2,760	217	1,266	667	128	482
Educational Services	2,567	31	172	338	110	1,916
Manufacturing	2,446	12	1,145	671	379	239
Other Services (excluding Public Administration)	1,712	65	412	481	142	612
Public Administration	1,465	33	67	1,300	26	29
Construction	1,376	16	864	193	67	236
Information	1,374	75	176	595	424	104
Wholesale Trade	1,129	31	510	229	61	298
Management of Companies and Enterprises	979	180	139	576	3	81
Real Estate and Rental and Leasing	755	50	262	294	64	85
Transportation and Warehousing	709	16	44	94	475	80
Arts, Entertainment, and Recreation	570	1	216	94	11	248
Utilities, Agriculture, and Mining	13	2	1	6	1	3
Total	53,725	7,372	10,584	20,142	4,165	11,462

Source: OntheMap: U.S. Census, Center for Economic Studies



The industry sector of strength in the Golden Triangle/ Cherry Hill Mall area was not surprisingly retail trade, constituting 25.8% of the jobs in that location. At the same time, the mall area had 67% of all retail trade jobs in the township. Similarly, in this area, accommodation and food services jobs (closely related to retail trade) constituted 65% of all township employment in that industry. The stand-out industry sector for employment in the Ashland/Woodcrest area – the smallest employment node among those examined – was Professional, Scientific, and Technical Services. The jobs in that category represented 28.8% of all employment in the node.

The I-295 Industrial area had the second highest concentration of employment in the township (10,584 jobs—19.7%), though spread more universally among several industry sectors than the other nodes. The remaining 11,462 jobs in the township (21.3%) are distributed throughout the township, though additional smaller employment nodes can be identified, particularly along Springdale Road.

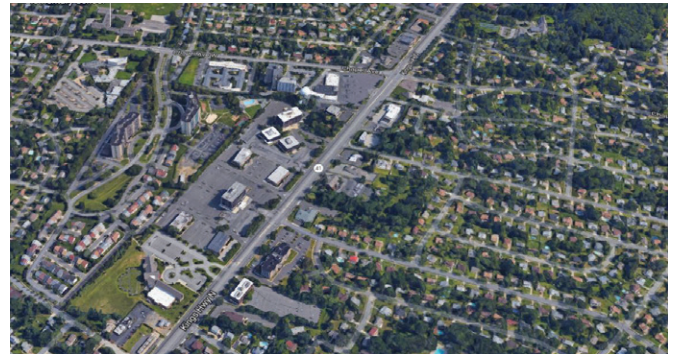
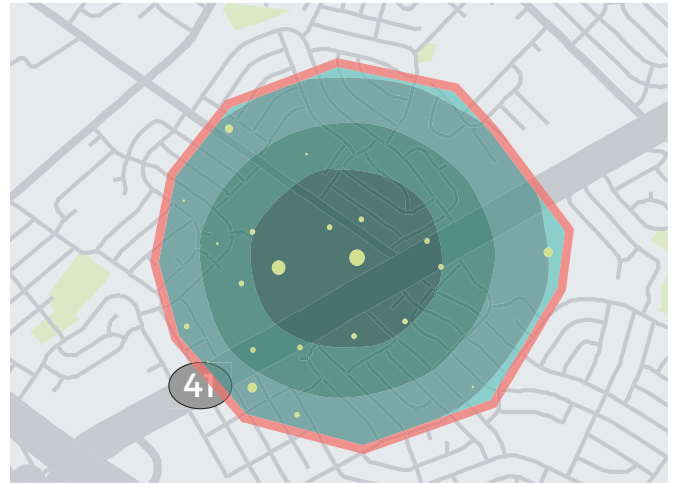
KINGS HIGHWAY/CHAPEL AVENUE AREA

The Kings Highway/Chapel Avenue Area node encompasses the intersection of Kings Highway and Chapel Avenue, as well as the office buildings along Kings Highway south of the intersection including Cherry Hill Tower (see Figure 22).

Employment in the Kings Highway node grew by over 105.7% between 2002 and 2014 to 7,372 jobs. Figure 22 shows how these jobs have changed by industry sector from 2002 to 2014.

The most dramatic job growth in the Kings Highway/Chapel Avenue area from 2008 to 2014 was in the Administration & Support sector with 4,678 workers (63.5% of employment) by 2014. In addition, Health Care & Social Assistance (920 jobs—12.5% of employment in 2014) and Professional, Scientific & Technical Services (898 jobs—12.2% of employment in 2014) held their previous strong positions and grew steadily during this period. As noted above, businesses in the administration & support sector are heavily concentrated in temporary employment agencies, janitorial services to buildings, security services, and related administrative functions. It is possible that the strong growth of these jobs in the Kings Highway/Chapel Avenue area reflects both the changing character of employment (increase in contract and temporary employees) and the location along King's Highway of the management offices of companies, such as Accu Staffing, providing these services. Hence, this apparent concentration of employment (reported through payroll) likely does not translate to occupied office space or nearby employee-serving businesses, such as lunch dining and convenience retailing, since the temporary and contract employees do not actually report to this King's Highway location.

Figure 22. Kings Highway Area Employment Concentration (2014)



Between 2002 and 2014, the Kings Highway/Chapel Avenue Area employment concentration gained 3,788 jobs, including 3,267 jobs gained in administration & support, 501 in health care & social assistance, and 195 jobs in professional, scientific & technical services.

Figure 23. Jobs by Industry Sector - Kings Highway

	2014		2008		2002	
	Count	Share	Count	Share	Count	Share
Administration & Support	4,678	63.5%	623	22.4%	1,411	39.4%
Health Care and Social Assistance	920	16.6%	574	20.6%	419	11.7%
Retail Trade	898	12.2%	779	28.0%	703	19.6%
Other	876	11.9%	805	28.9%	1,051	29.3%
Total	7,372		2,781		3,584	

Source: OntheMap: U.S. Census, Center for Economic Studies

I-295 INDUSTRIAL AREA

The I-295 Industrial Area encompasses the industrial properties flanking the New Jersey Turnpike, centered on an area between Interstate 295 and Springdale Road north of Route 70 (see Figure 24). Employment in the I-295 Industrial Area node grew by over 32.0% between 2002 and 2014 to 10,584 jobs. Figure 24 shows how these jobs have changed by industry sector during this period.

Jobs in the I-295 Industrial Area are much more evenly spread among several industry sectors than in other areas of employment concentration. The largest jobs sector in this employment node in 2014 was Health Care & Social Assistance with 1,954 workers (18.5% of employment), closely followed by Administration & Support (1,573 jobs—14.9%). Considering Finance and Insurance (1,266 jobs—12.0%) and Manufacturing (1,145 jobs—10.8%), these top four industries in the I-295 Industrial Area all comprised between 10 and 20% of the total employment in the node in 2014.

Between 2002 and 2014, the I-295 Industrial Area gained 2,567 jobs, largely in Administrative & Support with 1,286 jobs added, and Health Care & Social Assistance with 1,121 jobs added. Manufacturing grew by 300 jobs – rare for a suburban municipality like Cherry Hill, but logical considering the industrial nature of the employment concentration.

Figure 24. The I-295 Industrial Area Employment Concentration (2014)

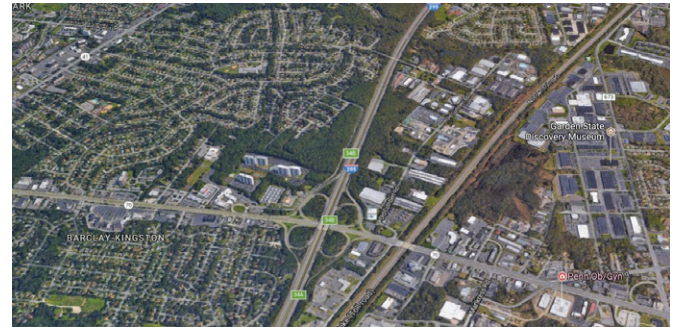
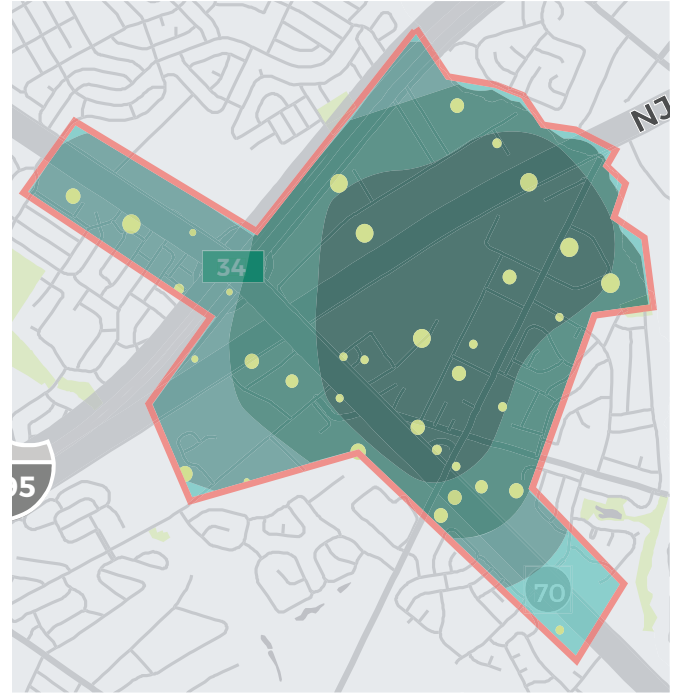


Figure 25. Jobs by Industry Sector - I-295

	2014		2008		2002	
	Count	Share	Count	Share	Count	Share
Health Care and Social Assistance	1,954	18.5%	930	9.5%	833	10.4%
Administration and Support	1,573	14.9%	698	7.1%	287	3.6%
Finance and Insurance	1,266	12.0%	1,284	13.1%	749	9.3%
Manufacturing	1,145	10.8%	765	7.8%	845	10.5%
Professional, Scientific, and Technical Services	925	8.7%	905	9.2%	1,405	17.5%
Construction	864	8.2%	807	8.2%	666	8.3%
Retail Trade	691	6.5%	713	7.3%	529	6.6%
Wholesale Trade	510	4.8%	1,499	15.3%	496	6.2%
Other Services (excluding Public Administration)	412	3.9%	337	3.4%	264	3.3%
Other	1,244	11.8%	1,865	19.0%	1,943	24.2%
Total	10,584		9,803		8,017	

Source: OntheMap; U.S. Census, Center for Economic Studies

GOLDEN TRIANGLE/CHERRY HILL MALL AREA

The Golden Triangle/Cherry Hill Mall Area employment node encompasses the area of the Township most noted for its retail concentration. It includes the Golden Triangle, containing Garden State Park and Executive Campus, and the Cherry Hill Mall as well as the key corridors of Route 38, Route 70, and Haddonfield Road (see Figure 26). Employment in the Golden Triangle/Cherry Hill Mall Area node grew by over 67.7% between 2002 and 2014 to 20,142 jobs.

The largest jobs sector in the Golden Triangle/Cherry Hill Mall Area in 2014 was Retail Trade with a significant 5,191 workers (25.8% of employment) (see Figure 27). This almost doubled the jobs in the next closest industry sectors, Health Care & Social Assistance (2,949 jobs—14.6%) and Accommodation and Food Services (2,775 jobs—13.8%). This last category, combined with Retail Trade, constituted almost 40% of the jobs in 2014 in the Golden Triangle/Cherry Hill Mall Area – a location best known for its stores and restaurants.

Between 2002 and 2014, the Golden Triangle/Cherry Hill Mall Area gained 8,128 jobs. Retail experienced the largest increase by far with 2,636 jobs, in part reflecting the construction of Garden State Park and the expansion of the Cherry Hill Mall. Accommodation and Food Service grew by 1,686 jobs while Health Care and Social Assistance increased by 1,864. Other growth industries include Public Administration (927 jobs); Administration & Support (866 jobs); and Management of Companies and Enterprises (576 jobs).

Figure 26. The Golden Triangle/Cherry Hill Mall Area Employment Concentration (2014)

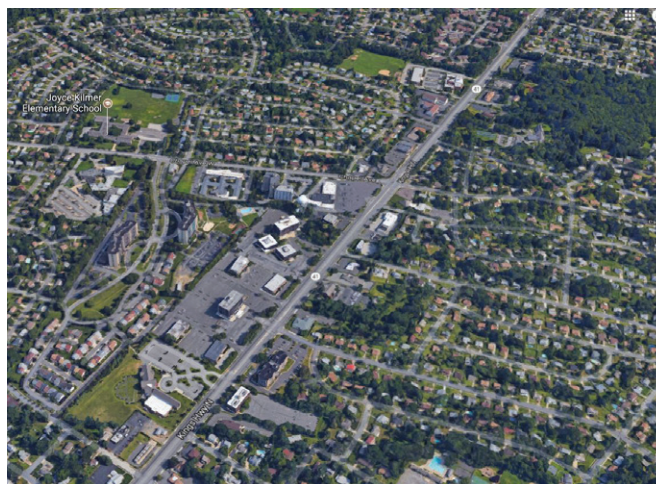
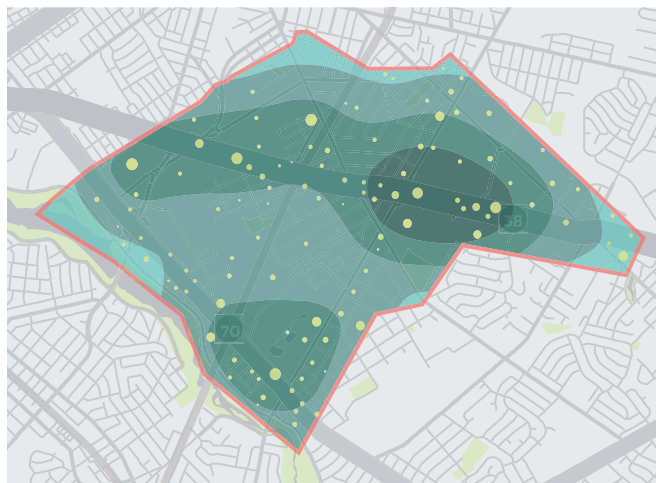


Figure 27. Jobs by Industry Sector - Golden Triangle/Cherry Hill Mall

	2014		2008		2002	
	Count	Share	Count	Share	Count	Share
Retail Trade	5,191	25.8%	3,521	24.7%	2,555	21.3%
Health Care and Social Assistance	2,949	14.6%	799	5.6%	1,085	9.0%
Accommodation and Food Services	2,775	13.8%	1,710	12.0%	1,089	9.1%
Administration and Support	2,209	11.0%	1,999	14.0%	1,343	11.2%
Professional, Scientific, and Technical Services	1,480	7.3%	1,527	10.7%	1,165	9.7%
Public Administration	1,300	6.5%	377	2.6%	373	3.1%
Manufacturing	671	3.3%	707	5.0%	784	6.5%
Finance and Insurance	667	3.3%	876	6.1%	916	7.6%
Information	595	3.0%	339	2.4%	760	6.3%
Other	2,305	11.4%	2,398	16.8%	1,944	16.2%
Total	20,142		14,253		12,014	

Source: OntheMap: U.S. Census, Center for Economic Studies

ASHLAND/WOODCREST AREA

The Ashland/Woodcrest Area employment node encompasses the Woodcrest PATCO station and as well as the adjacent Woodcrest Corporate Center. It also extends to the north and west along Haddonfield-Berlin Road (see Figure 28).

The largest jobs sector in the Ashland/Woodcrest Area in 2014 was Professional, Scientific & Technical Services, with 1,199 workers (28.8% of employment) (see Figure 29). At about half this size were the Transportation and Warehousing sector (475 jobs—11.4% of employment); Administration & Support (438 jobs—10.5%); and Information (424 jobs—10.2%).

Employment in the Ashland/Woodcrest Area grew by 31.9% between 2002 and 2014 to 4,165 jobs. Between 2002 and 2014, the Ashland/Woodcrest Area gained 1,008 jobs, with Professional, Scientific & Technical Services gaining 1,059 jobs, Transportation and Warehousing increasing by 444 jobs, and Administration & Support by 275 jobs. Growth in these sectors balanced losses in the Information and Health Care and Social Assistance sectors.

Figure 28. The Ashland/Woodcrest Area Employment Concentration (2014)

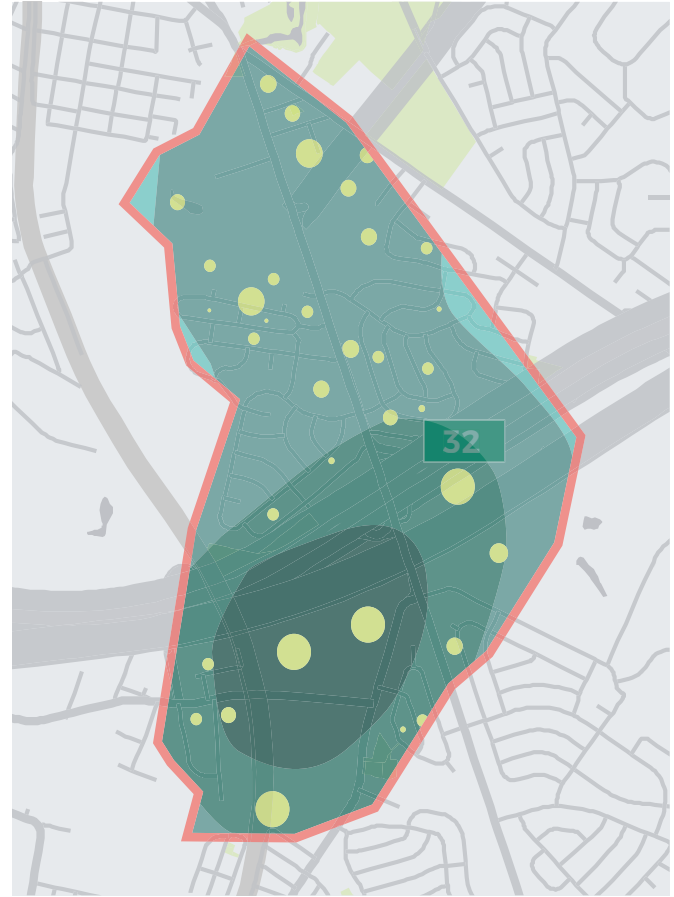


Figure 29. Jobs by Industry Sector - Ashland/Woodcrest

	2014		2008		2002	
	Count	Share	Count	Share	Count	Share
Professional, Scientific, and Technical Services	1,199	28.8%	189	4.3%	140	4.4%
Transportation and Warehousing	475	11.4%	34	0.8%	31	1.0%
Administration and Support	438	10.5%	102	2.3%	163	5.2%
Information	424	10.2%	2,328	53.0%	759	24.0%
Manufacturing	379	9.1%	245	5.6%	468	14.8%
Retail Trade	315	7.6%	305	6.9%	328	10.4%
Health Care and Social Assistance	197	4.7%	297	6.8%	446	14.1%
Other Services (excluding Public Administration)	142	3.4%	129	2.9%	148	4.7%
Finance and Insurance	128	3.1%	324	7.4%	105	3.3%
Accommodation and Food Services	125	3.0%	108	2.5%	116	3.7%
Other	343	8.2%	333	7.6%	453	14.3%
Total	4,165		4,394		3,157	

Source: OntheMap: U.S. Census, Center for Economic Studies



2. CHERRY HILL COMMERCIAL CORRIDORS

BACKGROUND AND EXISTING CONDITIONS

Three commercial corridors—Route 38, Route 70, and Haddonfield Road—serve as regional commercial spines traversing Cherry Hill. The quality of the physical environment and the apparent prosperity of commercial activity along the 12 miles of these roadways contributes to the regional perception of Cherry Hill Township as the commercial core of South Jersey. Despite the commercial nature of these corridors, the uses and overall aesthetics of each corridor vary substantially.

Uses and roadway frontage characteristics vary substantially throughout these three corridors.

Large Developments: About one-third of the frontage in these corridors is occupied by the edges of large developments with long frontages and large lot depths that reach deeply off the corridors. These larger developments that “edge” the corridors include:

- Major retail/mixed use complexes such as Cherry Hill Mall, the Garden State Park development, Garden State Pavilions, the Walmart complex on Route 38, Hillview Shopping Center, Ellisburg Shopping Center, and Plaza at Cherry Hill;
- Multi-building office complexes such as Commerce Center, Liberty View, Cherry Tree Corporate Center, Woodland Falls Corporate Park, Executive Mews, and 51-57 Haddonfield Road; and
- Cemeteries, athletic fields, the footprints of grade separated intersections, and other open space.

In general, these “edge” uses have limited entrance and egress from the roadways and present a positive image for the corridors due to quality landscaping and uniform maintenance.

Non-Commercial Uses: Another 6% of frontage consists of the “highway edge” of larger non-commercial uses, such as apartment complexes, multi-building residential developments, entrances to single-family neighborhoods, senior health care facilities, houses of worship, and educational facilities. Again, the limited entrance and egress from the roadways and the positive image of these properties due to quality

landscaping and maintenance contribute positively to the appearance of, if not the activity on, the corridors.

Individual Homes: An additional 6% of frontage consists of freestanding current or former residences—many of which have been converted to commercial uses. These properties can present specific concerns. Ingress and egress to these smaller sites means a significant number of turning movements on roads with a high rate of speed. Façade appearance and signage is inconsistent, leading to a lack of any sense of place. Finally, parking is often difficult to provide in sufficient number on smaller lots that have been converted to businesses, leaving customers parking on side streets often in residential neighborhoods.

Commercial Frontage: The remaining 55% of frontage involves commercial properties with active frontage along these three corridors. The variety of circumstances found among these properties has very important impacts on the functioning and appearance of these corridors, as discussed below.

OPPORTUNITIES & CHALLENGES WITH COMMERCIAL FRONTAGE PROPERTIES

Cherry Hill has benefited substantially from both long-term and recent investments in many of these commercial frontage properties that present a number of opportunities for the township. However, there are also a number of challenges that impact the success of these commercial corridors.

Large Single Use Facilities: Numerous larger parcels are occupied by single use facilities—hotels, individual multi-story office buildings, new automobile dealerships, larger multi-specialty medical office hubs, movie complexes, and large full-service restaurants—both national chain and independent/regional. In most cases, these facilities are well-maintained and appear prosperous.

High-Value Freestanding Retail Facilities: There has been and continues to be significant investment in high-value freestanding retail facilities—drug stores, convenience stores with gas service, and fast food outlets. These operations generate very high volumes of sales and have encouraged reinvestment in the Haddonfield Road corridor between Garden State Park and Cherry Hill Mall and at key traffic signal controlled intersections along all three corridors. These modern

retailers seek high traffic locations and ease of entrance and exit in both directions. Because of the high volumes of sales generated by these specific retailers, they can afford to support higher site purchase prices than many other uses; hence, we should not be surprised that these uses dominate development at these high access locations.

The volumes of sales generated by these specific retailers derive in part from their generally rigid site requirements—visible standardized signage, highly accessible and visible parking, and—often—drive through window service. However, in general, these retailers can present attractive and appropriate presentation for higher-speed, high volume corridors due to quality landscaping and limited entrance and egress. They also provide substantial benefits for their host communities by adding significantly to tax base and by projecting a sense of modern prosperity for those communities.

Smaller Strip Shopping Centers: There are a number of smaller strip shopping centers—most in strong condition, but a few in need of reinvestment. In general, the businesses in these smaller shopping centers benefit from shared parking and more easily recognized ingress and egress from the high speed traffic on Routes 38 and 70.

Individual Commercial Properties/Automotive Service Uses: While smaller properties near traffic signal controlled intersections are proving attractive for valuable restaurant and drug store outlets, small commercial properties away from these intersections have less easy access and are not displaying such signs of reinvestment. Urgent care facilities have successfully utilized some of these properties, but many others are for sale, vacant, or marginally used.

Many of these more marginal properties are occupied by automotive service facilities such as car washes, truck rental, auto repair, and tires sales and service. The quality of landscaping, screening, façade maintenance, and storage of vehicles varies widely for these automotive uses—in many cases negatively impacting the appearance of the commercial corridor.

Automobile Dealership Frontages & Car Storage: We should also note that, while the highly valuable automobile dealerships have invested heavily in attractive buildings, the parking lot edges of these

businesses along the corridors do not reach the same high standard.

These dealerships also generate a high demand for convenient off-site auto storage resulting in the current use of some corridor properties—especially on Haddonfield Road—for that purpose.

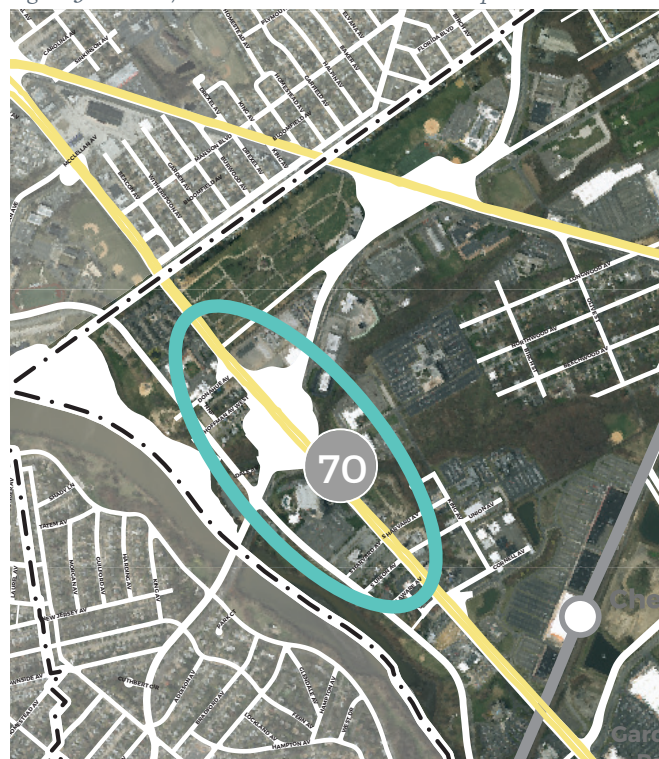
CORRIDORS IN NEED OF REVITALIZATION

There are scattered locations requiring rejuvenation along these corridors—the former Lone Star Steakhouse on Route 38 is a prime example—but these negative conditions tend to cluster in certain locations.

Route 70 Between Union Avenue & Hampton Road:

There is a significant area of vacancy and marginal business use on the north side of Route 70 between Union Avenue and Hampton Road. This situation is especially unfortunate because it occurs at the gateway to Cherry Hill from Philadelphia. The frontage runs for nearly 6,000 linear feet, one-third of which is the ramp system for Cuthbert Boulevard. Other than this ramp, the only active uses west of the Mikado Japanese restaurant are a car wash and a small auto body shop.

Figure 30. Route 70 Between Union Avenue & Hampton Road



This area abuts and fronts the Executive Campus office complex. There is significant opportunity for redevelopment of this entire stretch of Route 70 (see Figure 30).

Route 38 Between Longwood Avenue & Haddonfield Road: The section of Route 38 between Longwood Avenue and Haddonfield Road runs for about 3,500 linear feet. Although there are modern food service facilities at the traffic light controlled intersections (Longwood; Chapel) and successful freestanding destination retailers scattered along the corridor, vacant lots and more marginal business uses abound, offering the potential for redevelopment or reuse for an overall stronger corridor economy. Key opportunities include several vacant parcels, as well as current auto service facilities and a few vacant buildings (see Figure 31).

West Side of Haddonfield Road North of Route 38: Across Haddonfield Road from the Cherry Hill Mall is a series of smaller shopping centers, freestanding retailers, and a large number of auto service facilities. To achieve maximum benefit from adjacency to the Mall, this area could benefit from a more uniform appearance. Some retailers have very positive facades and strong landscaping, while others—especially some of the auto service facilities—have limited landscaping and active auto service activities visible from the street. There is also a highly visible vacant property on the northwest corner of Haddonfield and Church, which should be developed as an attractive retail use (See Figure 32).

Erlton Shopping Center: The Erlton shopping area on Route 70 presents a special case with the opportunity for a more “Main Street” type improvement effort that would integrate the many successful businesses there with new ones brought to fill the few, but visible vacancies. Shared parking and streetscape enhancements that both evoke the retro character of the district and are “readable” for Route 70 traffic could provide very significant benefit (see Figure 33).

Figure 31. Route 38 Between Longwood Avenue & Haddonfield Road

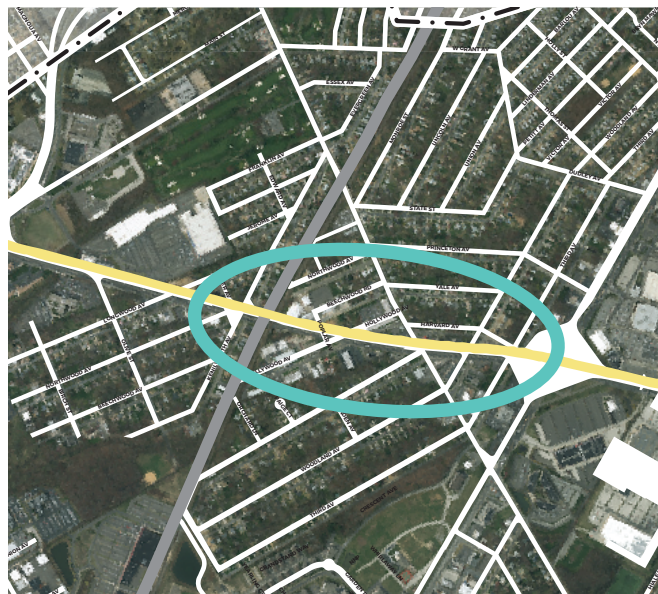


Figure 32. West Side of Haddonfield Road North of Rt. 38

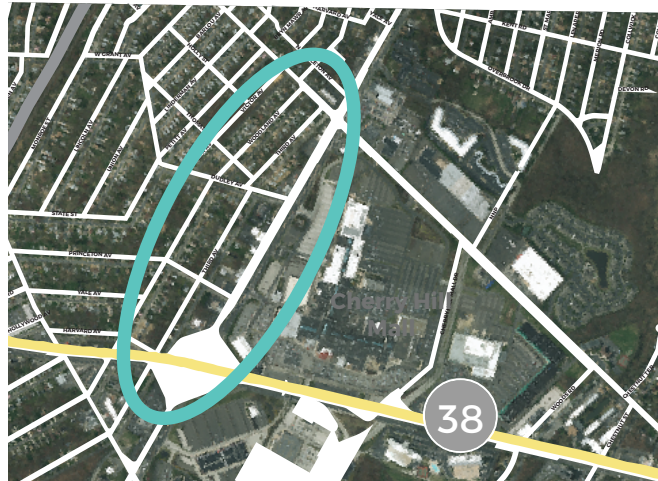
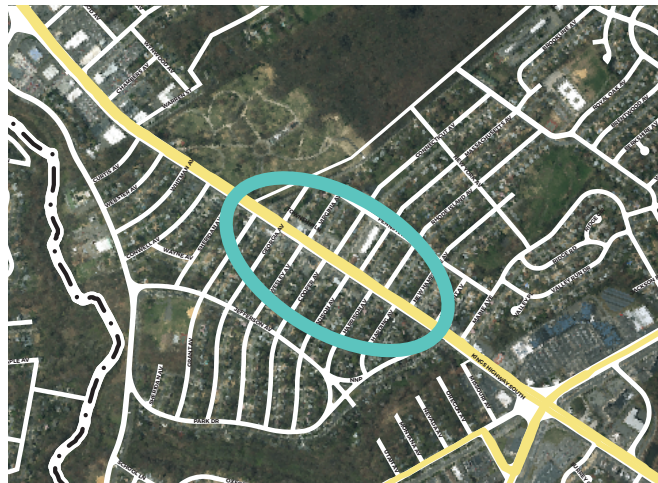


Figure 33. Erlton Shopping Center



CONSIDERATION FOR NEXT STEPS

GENERAL CORRIDOR APPEARANCE

Entrances to Cherry Hill along all three corridors lack visible gateway characteristics such as welcome signage and attractive landscaping areas

Homes converted to business use along these corridors present inconsistent quality in use, façade appearance, and signage. Stronger standards and incentive programs could bring lagging properties up to desired appearance.

AUTOMOTIVE FACILITIES

Viable auto service businesses are both an important component of the Cherry Hill economy and service supports needed by Cherry Hill residents. However, many of these businesses—located in highly visible locations along key corridors—exhibit poor landscaping and inadequate screening. Some also store autos in locations that negatively impact adjacent residents and businesses. Consistently applied standards are necessary for these businesses to become better neighbors for other businesses along these corridors.

Cherry Hill's many automobile dealerships are a distinctive component of the Cherry Hill economy which should be celebrated. A distinctive "Cherry Hill look" for these dealerships could enhance the appearance of the dealerships and of the corridors on which they are located.

These auto dealerships need appropriate locations for auto storage that do not include visible parking along the key commercial corridors.

EFFICIENT COMMERCIAL DEVELOPMENT

Smaller shopping centers along these corridors provide effective commercial locations. However, other small, single-use properties are less attractive and productive for these businesses. Collaboration among adjacent smaller properties on these corridors could generate more effective development patterns. This collaboration may be as dramatic as site assembly and redevelopment, but lesser levels of collaboration could also be effective: common façade improvements, shared ingress and egress, shared parking, collaborative signage, etc.

The north side of Route 70 between Union and Hampton offers significant potential for redevelopment, perhaps in conjunction with a significant revitalization of the overall Golden Triangle.

Erlton offers the potential to act as a prototype for mini-revitalization efforts along the commercial corridors, if a concentrated, multi-component approach could be programmed for this location.

Other areas needing focused enhancement programs are Route 38 from Longwood to Haddonfield and the west side of Haddonfield Road north of Route 38.

3. COMMERCIAL MARKET TRENDS

Cherry Hill Township is a premier location for commercial development – predominantly office and retail – in the Philadelphia metropolitan area. Due to the magnitude of this development, it is a key component of the township's economy. Furthermore, real estate trends mirror the industry trends described above; employment growth often results in new development opportunities while job losses can create vacancies and the need for redevelopment. The following assessment, based on findings from WCRE in its "Q2 2017 – Southern NJ Office/Retail Market Update", focuses on trends impacting Cherry Hill's office and retail markets.

OFFICE MARKET

Overall, as of July 2017, the office market was showing strong fundamentals for growth in South Jersey as demand for office space and leasing activity increased in the second quarter of 2017. Healthcare, insurance, technology, and service businesses increased their occupancy needs during this time. Small- to mid-sized tenants continue to show signs of expansion.

In Cherry Hill, leasing activity remained active. However, with the move of such companies as Subaru and American Water to Camden, significant spaces will be returning to the market, creating a potential spike in vacancy.

The investor/sales market was also showing signs of increased activity in Cherry Hill, where a higher level of vacancies was creating below-market opportunities favorable for purchasing. Some local business owners

were therefore transitioning from rent-paying tenants into owner-occupant investors. It is expected that this trend will continue through 2017.

While occupancy data is not available for Cherry Hill Township at the municipal level, the vacancy rate for office space in Camden County dropped to 11.7% at the end of the second quarter of 2017 compared to 13.3% in the first quarter. Average rents for Class A and Class B office product continued to range from \$10.00 to \$14.50 per SF (for a NNN lease – one that passes through property taxes, property insurance, and common area maintenance fees to the lessee) or \$20.00 to \$24.50 per SF (for a gross lease) during the second quarter. This remained relatively unchanged from the first quarter of 2017.

RETAIL MARKET

Consumer confidence continued to grow since the Great Recession, and retail sales were up 3.9% for the first half of 2017, according to WCRE. However, e-commerce continued to steal shares of these retail gains. It is expected that e-commerce sales will increase by 15% in 2017 - compared to 13% in 2016 – growing to 8.5% of the nation’s total retail transactions (up from 3.2% in 2007). In-store sales will increase by 2%.

The vacancy rate for retail space in Camden County was 9.4% at the end of the second quarter of 2017, compared to 10.5% in Burlington County and 7.1% in Gloucester County, and well below the U.S. average of 12.5%. Retail rents in Camden County hovered around \$12.00 per SF during the second quarter.

Despite the growth in e-commerce, a report issued in August 2017 by the IHL Group entitled “Debunking the Retail Apocalypse” suggests that more stores are opening than closing. The study revealed that chain retailers are opening 4,080 more stores in 2017 than they are closing; chains are opening a net 14,239 stores while closing 10,123 stores. The largest gains are in mass-merchandisers - including off-price and value chains, followed by convenience stores, and grocery retailers. The study also found that just 16 chains account for 48.5% of the total number of stores closing, and that five of the 16 represent 28.1% of the total closings. The bulk of retailers that are growing tend to have small and intermediate store spaces, while an

important segment of the declining group - department stores - specifically Sears, Kmart, and JC Penney, tend to occupy large-format stores. The result is, while there’s likely a net gain in retail square-footage, it is occurring in more numerous smaller stores, frequently on pad sites, while the stores that are closing are much larger and therefore more noticeable.

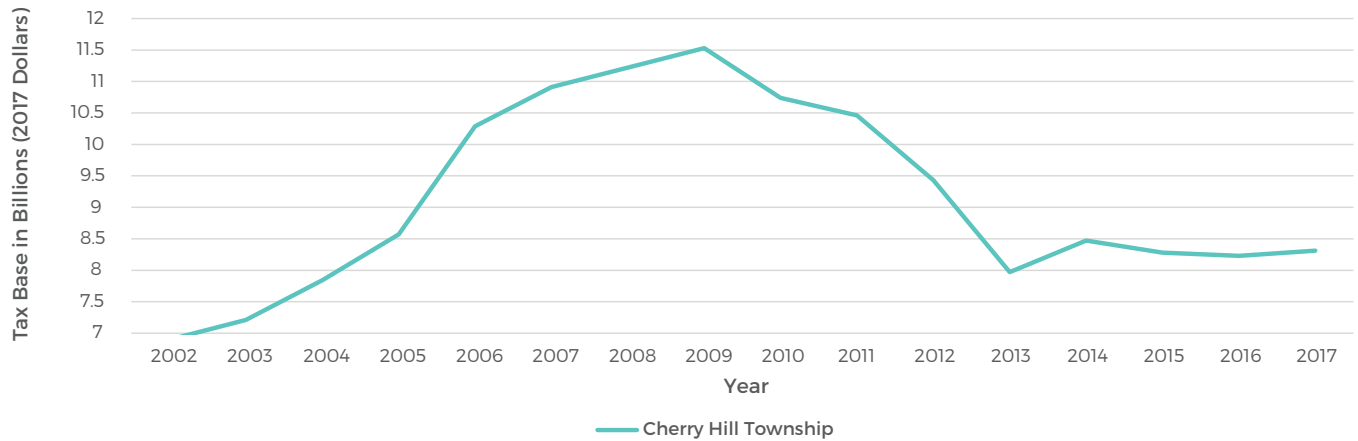
Nonetheless, these trends will have implications for malls and shopping centers, including those in Cherry Hill. As a means for protecting their real estate assets, future commercial development and redevelopment is trending toward mixed-use, particularly with a residential component. By building apartments or condos at larger retail and mall properties, retail-center landlords hope to insulate themselves by boosting their tenants’ customer bases while generating income for themselves through the sale or rental of the dwelling units. Garden State Park is an example for this type of development.

Developers in Cherry Hill have concurred with these trends and anticipate gradual conversions of some of the township’s older traditional retail centers into places with a live, work, and play component. This philosophy is growing, which can be accommodated through mixed-use development. The millennial generation is reportedly seeking high-quality service-

Figure 34. Tax Base Trends in Cherry Hill

Year	Equalized Valuation Cherry Hill	Equalized Valuation (2017 Dollars)
2002	\$ 5,060,141,117	\$ 6,900,215,306
2003	\$ 5,407,516,193	\$ 7,206,683,257
2004	\$ 6,029,605,370	\$ 7,836,867,655
2005	\$ 6,903,594,015	\$ 8,571,117,562
2006	\$ 8,453,318,961	\$ 10,283,093,803
2007	\$ 9,214,981,750	\$ 10,909,072,765
2008	\$ 9,946,147,878	\$ 11,220,699,383
2009	\$ 10,086,207,691	\$ 11,526,967,741
2010	\$ 9,503,219,927	\$ 10,737,895,885
2011	\$ 9,612,304,593	\$ 10,456,652,404
2012	\$ 8,838,694,823	\$ 9,427,363,120
2013	\$ 7,564,599,160	\$ 7,973,926,005
2014	\$ 8,167,722,329	\$ 8,469,271,051
2015	\$ 7,980,976,889	\$ 8,278,622,097
2016	\$ 8,053,043,625	\$ 8,232,865,179
2017	\$ 8,310,281,257	\$ 8,310,281,257

Figure 35. Cherry Hill Tax Base: Equalized Valuation in 2017 Dollars



oriented businesses (restaurants, fitness centers, etc.), and wants to be able to walk there from their residences. Smaller residential units are increasingly acceptable as long as services and access are good.

Further supporting this mixed-use trend, according to developers, strictly retail developments are riskier, especially enclosed malls. An exceptional regional mall with quality retailers in a good location, such as Cherry Hill Mall, is likely relatively safe. However, other more marginally-performing centers with vacancies will need to be repositioned. The brick-and-mortar retail component is emphasizing an improved customer experience and high-service – including quality restaurants, high-end fitness centers, spas, and pet-related services. Entertainment is a growing trend as well, incorporating such things as zip lines, bowling, etc. into former retail space, which cannot be found online.

4. TAX BASE TRENDS

The strength of the Cherry Hill economy, as expressed in the township's tax base—that is, in the value of the community's taxable real estate—is tracked from 2002 to 2017 on Figure 34. As shown there, the equalized value of Cherry Hill's tax base stood at \$5.4 billion in 2002 and grew to \$10.1 billion by 2008 before starting a period of decline through 2014 that has only recently been reversed.

A more accurate assessment of tax base trends adjusts for inflation as shown on the third column of Figure 34 and as illustrated on Figure 35. This approach measures each year's tax base in 2017 dollars. Looked at in that perspective, the tax base grew rapidly during the real estate boom years of 2002 to 2007, continued to grow modestly until 2009, but began a sharp decline of 31%

Figure 36. Inflation-Adjusted Tax Base Trends by Major Land Use Component

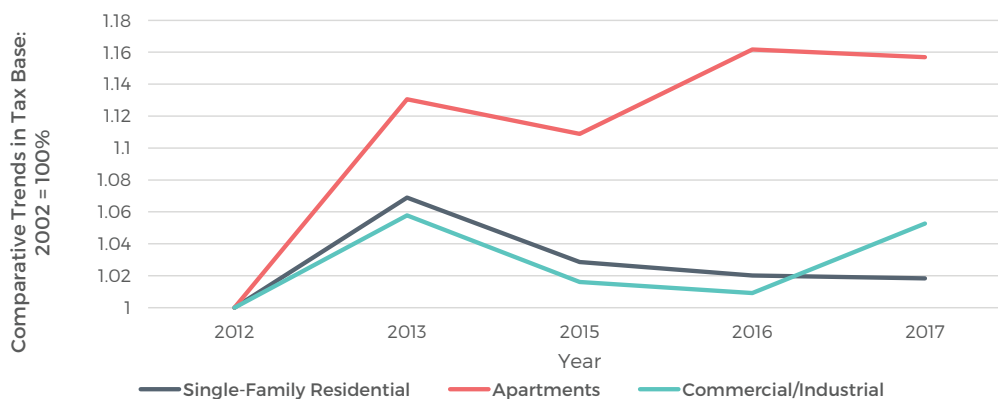
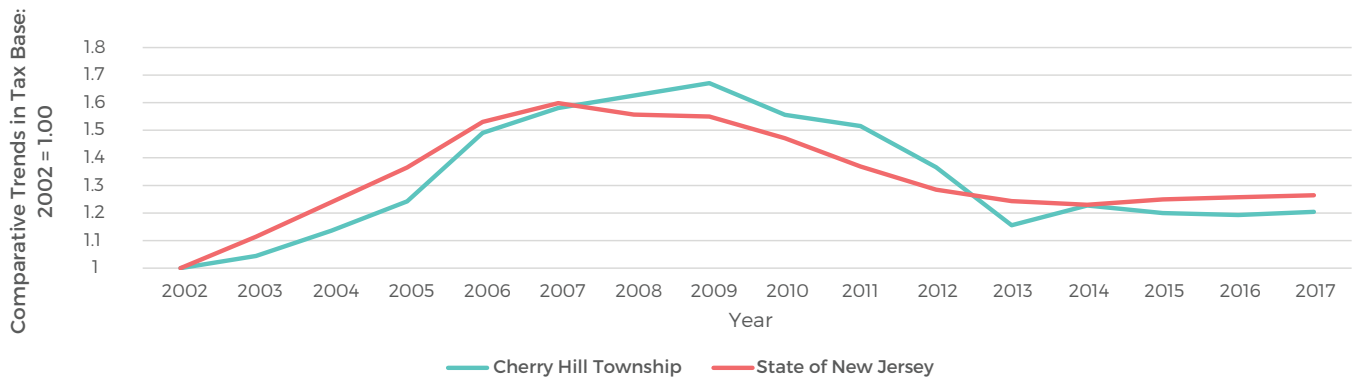


Figure 37. Cherry Hill and New Jersey Inflation-Adjusted Tax Base Trends



in four years through 2013. During 2013, a brief period of growth occurred. Starting in 2014, the tax base declined modestly again through 2016 by an annual average of 1% to the 2016 equalized value of \$8.2 billion before increasing again slightly in 2017.

An examination of the three largest components of the township's tax base – single-family residential property, apartments, and commercial/industrial property – provides a more detailed assessment of tax base trends (see Figure 36). While the graph illustrates growth trends from 2012 to 2013 for all three property types, the apartment component of Cherry Hill's tax base grew by 13% compared to the 6 to 7% for commercial/industrial and single-family residential. Although data for 2014 was unavailable, the tax base for all three types declined by 2015, with single-family residential and commercial/industrial experiencing more severe losses in value than apartments. While those two property types continued a modest decline throughout 2015, the apartment tax base rebounded by 2016 by almost 7%. Apartments then stabilized throughout 2016 along with single-family residential property, while commercial/industrial property experienced a modest 4% gain by 2017.

Another perspective on Cherry Hill's tax base is achieved by comparing trends in Cherry Hill's tax base to the overall tax base of all local jurisdictions in the State of New Jersey (see Figure 37). As illustrated here, New Jersey communities as a whole have followed trends in tax base in a pattern similar to those encountered by Cherry Hill, with significant gains during 2002 to 2007, though Cherry Hill's growth continued until 2009 as the state's tax base declined

during those two years. Both the state and township experienced major losses in the 2009 to 2013 period, and ultimately a recent slow pattern of stabilization and moderate growth. However, the decline in tax base during the 2009 to 2013 period averaged only 20% statewide versus 31% in Cherry Hill, leaving Cherry Hill's tax base in a poorer condition than the average New Jersey local jurisdiction by 2017.

5. STATE TRENDS AND THE CHERRY HILL ECONOMY

CHERRY HILL COMPARED TO NEW JERSEY GROWTH TRENDS

Between 2002 and 2014, Cherry Hill gained 8,300 jobs, most significantly in six sectors: administrative & support businesses (4,500 jobs); health care & social assistance (2,500); professional, scientific & technical services; accommodations and food services; management services; and retail trade. In comparison, major growing sectors in New Jersey during this period were: health care & social assistance (117,000 jobs); educational services (83,000); accommodations and food services; and professional, scientific & technical services.

Conversely, for New Jersey as a whole, manufacturing lost 121,000 jobs; wholesale trade lost 23,000; and the information sector lost 19,000. At the same time, Cherry Hill lost significant numbers of jobs in the information, wholesale trade, and finance and insurance sectors.

Comparing Cherry Hill trends with New Jersey as a whole, six items stand out:

First, Cherry Hill has followed state trends in the growth of the health care & social assistance, accommodations & food services, and professional, scientific & technical services sectors, as well as in the decline of the wholesale trade and information sectors.

Second, Cherry Hill was not impacted by the rapidly declining New Jersey manufacturing sector, because manufacturing was only a small share (5.3%) of the Township's economy in 2002. At 4.6% in 2014, the manufacturing sector of Cherry Hill's economy remains smaller than the reduced 6.2% share of manufacturing to the overall New Jersey economy.

Third, Cherry Hill needs to be conscious of evolving trends in manufacturing. Manufacturing employment in the US declined from a peak of 19.5 million in 1979 to 11.5 million workers in 2010, as lower cost labor overseas replaced American workers. However, since 2010, manufacturing employment has grown by nearly one million workers (about 9% growth). Much of this employment expansion is in "advanced manufacturing." Both the spatial requirements of manufacturing spaces and the workforce requirements for advanced manufacturing differ from traditional manufacturing. The workforce needed for this "advanced manufacturing" model is much more productive, more highly skilled, and more highly compensated than traditional manufacturing workers - the machines make the products; the workers maintain and program the machines.

Fourth, Cherry Hill has not participated in the substantial growth of educational services in the New Jersey economy.

Fifth, while the administration & support sector has grown strongly in New Jersey (14.3%), Cherry Hill has seen explosive growth (92.2%).

Finally, Cherry Hill has grown the retail trade sector by 10.5% while New Jersey only grew by 1.8%.

IMPLICATIONS OF STATE ECONOMIC COMPARISON FOR CHERRY HILL

1. Cherry Hill has not participated in the growth of educational services that happened

elsewhere in New Jersey. Adding post-secondary educational services may be both an opportunity and a necessity for further economic growth in Cherry Hill.

2. Cherry Hill has not been as heavily impacted by a declining traditional manufacturing sector as have other New Jersey communities. However, as a focus on advanced manufacturing returns to the U. S., Cherry Hill will want to participate in that evolution and will need to increase focus on the manufacturing sector.
3. The economic adjustment to a more "freelance" employment structure (contract employment, more transitory workforce, more diverse scheduling) appears to have found a cutting edge in Cherry Hill with the dramatic growth in the administration and support sector suggesting that Cherry Hill is an administrative hub for a variety of temporary and contract employment organizations. Understanding Cherry Hill's advantage in this sector may provide the opportunity for further growth.

NEW JERSEY STATE ECONOMIC GROWTH TRENDS

Two recent analyses of the New Jersey economy and factors that need to be exploited in the future can inform opportunities for the Cherry Hill economy. These reports were prepared by New Jersey Future and McKinsey's New Jersey Office (see Spotlights on pages 34-40).

IMPLICATIONS OF STATE ECONOMIC ANALYSES FOR CHERRY HILL

1. Cherry Hill faces the challenge of upgrading/ updating aging retail concentrations. Earlier development patterns isolated these retail services and amenities from nearby single-family neighborhoods through limited street connections and "seas of asphalt." Potential state investment in walkable communities and transit-oriented development can provide Cherry Hill with the tools to effectively inter-relate these single family neighborhoods with retail concentrations and transit facilities

via positive new denser residential/business development that builds connections, rather than continuing isolation by substituting “walls of development” for the current parking lots.

2. The next wave of job growth in New Jersey is likely to focus on smaller companies, many in advanced manufacturing and business services
3. Provision of technical training for the middle-skilled workforce is likely to become more critical to job growth and retention. Cherry Hill must consider how it can access such skill training and trained workers for its businesses. This will have implications on home-work commuting patterns and on growing the current low level of post-secondary training resources in Cherry Hill.
4. New state business financing mechanisms could provide additional resources for Cherry Hill to grow its job base. However, state incentive programs are likely to evolve; Cherry Hill must remain current on changing opportunities to support existing and new businesses.

6. METROPOLITAN AREA FORECASTS

Two key regional planning documents prepared by the Delaware Valley Regional Planning Commission suggest trends that will influence the Cherry Hill economy. CONNECTIONS 2040 is the current regional plan document; in anticipation of updating this plan, DVRPC has recently issued Greater Philadelphia FUTURE FORCES detailing key factors influencing the future. The key recommendations of these documents are highlighted on pp35-

IMPLICATIONS OF REGIONAL PLANNING FORECASTS FOR CHERRY HILL

1. As a Metropolitan Subcenter, Cherry Hill has been prioritized for reinvestment, growth, and infrastructure investment.
2. Transportation investments and land use patterns must recognize the evolving technology of travel; in particular, the changes

likely to occur through ride sourcing, micro transit, and driverless technology.

3. Cherry Hill employers need to access the growing technical workforce living in Center City Philadelphia.
4. Cherry Hill needs to exploit its position as one of six Metropolitan Subcenters in creating housing environments attractive to the millennial workforce.
5. Cherry Hill needs to expand post-secondary offerings—both to expand its technical workforce and to provide an innovation hub to support new business development.
6. Growth in small scale advanced manufacturing provides an opportunity for business development in Cherry Hill.
7. Entrepreneurial business development needs to be supported in Cherry Hill through co-working spaces, sensitive regulation, and incubator facilities.

IMPLICATIONS OF ECONOMIC TRENDS FOR THE FUTURE CHERRY HILL ECONOMY

Drawing together all the above analysis of the Cherry Hill economy and its current and future position within New Jersey and the Delaware Valley, we observe these factors that impact Cherry Hill’s future:

1. **Cherry Hill’s economic position has been and remains strong.** Employment grew by 18.1% between 2002 and 2014--significantly higher than New Jersey’s growth rate of 6.6%. Cherry Hill remains a substantial center of employment concentration with 22,000 more jobs than employed persons, but 91% of jobs in Cherry Hill are filled by in-commuters.
2. **Cherry Hill’s tax base was hurt more dramatically than most New Jersey communities** by the economic recession of 2007 to 2012. Cherry Hill needs to continue and accelerate its recent economic expansion.
3. Cherry Hill participated strongly in state trends in the **growth of the health care & social**

assistance, accommodations & food services, and professional, scientific & technical services sectors.

4. Cherry Hill has not participated in the growth of educational services that happened elsewhere in New Jersey. **Adding post-secondary educational services may be both an opportunity and a necessity for further economic growth in Cherry Hill**--both to expand its technical workforce and to provide an innovation hub to support new business development.
5. The next wave of job growth in New Jersey is likely to focus on **smaller companies, many in advanced manufacturing and business services**. Entrepreneurial business development needs to be supported in Cherry Hill through co-working spaces, sensitive regulation, and incubator facilities. As a focus on advanced manufacturing returns to the U. S., Cherry Hill will want to participate in that evolution; it provides an opportunity for business development in Cherry Hill.
6. **As a Metropolitan Subcenter, Cherry Hill has been regionally prioritized for reinvestment**, growth, and infrastructure investment. Cherry Hill must exploit that advantage by attracting transportation investments that recognize the evolving technology of travel; in particular, the changes likely to occur through ride sourcing, micro transit, and driverless technology.
7. Cherry Hill employers need to **access the millennial workforce**, especially the growing technical workforce living in Center City Philadelphia. Efforts must be made to both ease commuting to Cherry Hill for that workforce and for Cherry Hill to exploit its position as a Metropolitan Subcenter to create housing environments attractive to the millennial workforce.
8. The adjustment to a more **“freelance” employment structure (contract employment, transitory workforce, diverse scheduling)** appears to have found a cutting edge in Cherry Hill with the dramatic growth in the administration and support sector suggesting that Cherry Hill is an administrative hub for a variety of temporary and contract employment organizations. Understanding Cherry Hill’s advantage in this sector may provide the opportunity for further growth.
9. Cherry Hill faces the challenge of **upgrading/ updating aging retail concentrations**. Potential state investment in walkable communities and transit-oriented development can provide Cherry Hill with the tools to effectively inter-relate adjacent single family neighborhoods with retail concentrations and transit facilities via new residential/business development that builds connections.
10. This retail repositioning needs to incorporate Cherry Hill’s visible, gateway retail corridors—**Routes 38 and 70 and Haddonfield Road**. Recent investments along Haddonfield Road should be only the beginning of re-imaging key segments of these corridors.



SPOTLIGHT: SMART GROWTH IS ECONOMIC GROWTH BY NEW JERSEY FUTURE (MARCH 2017)

KEY RECOMMENDATIONS

1. INVEST WISELY IN INFRASTRUCTURE.

Make smart, cost-effective investments in transportation and water infrastructure to increase New Jersey's competitiveness and support healthy communities.

Infrastructure development has tremendous potential to unlock economic growth in New Jersey. The age and increasing deterioration of our trains and buses, pipes and tunnels, roads and rails has led to growing equity, environmental, and safety concerns. Investment in these areas promises thousands of jobs with equitable wages and a better quality of life for New Jersey residents. The next governor has the opportunity to explore new and responsible ways to finance and oversee investments and operations that will open new avenues of growth for New Jersey.

- Refocus state transportation agencies on the mission of improving access to more destinations for more people.
- Fund transit operations and capital improvements adequately in order to restore NJ Transit's systems and make them long-term growth drivers.
- Pursue a "One Water" strategy to modernize inadequate drinking water, wastewater, and stormwater systems in ways that strengthen communities and support future growth.

2. SUPPORT GOOD LOCAL REDEVELOPMENT.

Empower cities and towns to take the bold and difficult steps needed to allow them to meet the demographic, economic, and environmental challenges of the next century.

Smart-growth development can provide fiscal and social benefits to the state and its municipalities. The next governor should seize the opportunity to work with municipalities in their efforts to create vibrant places to live and work. Indeed, economic growth in the state depends on this partnership.

- Provide technical and financial resources to cities and towns to promote compact, walkable development.
- Support transit-oriented development and redevelopment through targeted tax credits and coordinated state policies and investments.
- Adopt a comprehensive housing strategy, including inclusionary zoning practices and incentive programs to ensure individuals and families at all life stages and income levels have access to quality homes.

3. INCORPORATE CLIMATE RISK INTO DECISION-MAKING.

Prepare our communities for the consequences of climate change and sea level rise through long-term planning and education about the growing risk of flooding.

With the effects of climate change accelerating, New Jersey's coastal areas could face up to six feet of sea level rise early in the next century. The next administration must confront the significant economic & health risks associated with weather-related and tidal flooding, aggravated by intensive development.

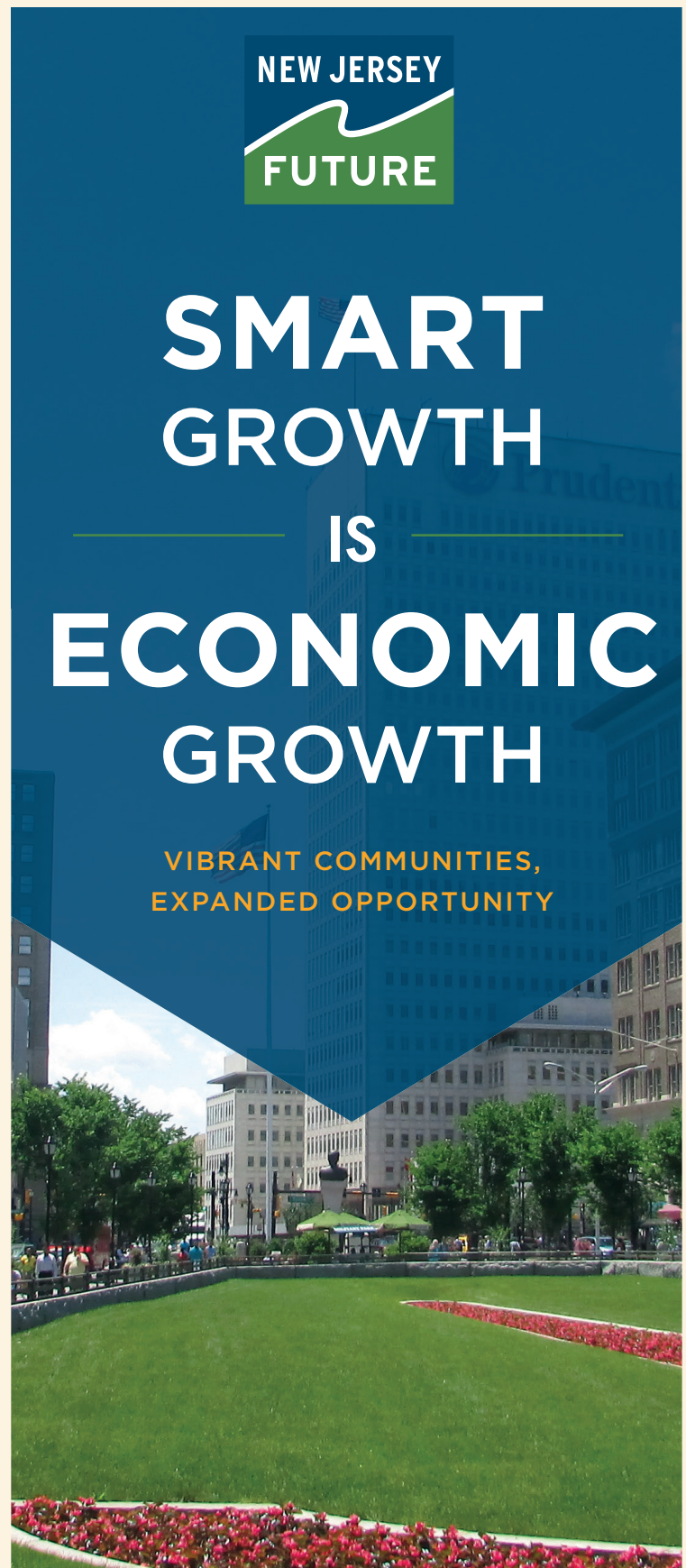
- Integrate science-based sea level rise projections and other climate change risk into decision-making at all levels of government.
- Support regional and local approaches to managing increased flood risks through land-use changes.
- Expand real estate disclosure requirements to prospective buyers and renters to include details on flood risk.

4. COORDINATE STATE DEVELOPMENT EFFORTS.

Provide leadership from the governor's office to direct state investments to ensure a prosperous, sustainable state and to support communities' efforts to create great places to live, work and play.

Clear and high-profile policy direction from the next governor is necessary to achieve smart growth and sustainable development in New Jersey. Breaking down agency silos, creating a culture of innovation and collaboration, and instituting transparency and effective performance measurement should be high priorities for the next governor and cabinet.

- Implement an organized and strategic state planning process that guides state actions and aligns local and state efforts.
- Initiate better data collection and its dissemination, utilize performance measurement and open reporting of results.
- Leverage new financing possibilities such as a state bank and public-private partnerships.



SPOTLIGHT: SMART GROWTH IS ECONOMIC GROWTH

RESEEDING THE GARDEN STATE'S ECONOMIC GROWTH: A VISION FOR NEW JERSEY BY NEW JERSEY FUTURE (JULY 2017)

KEY RECOMMENDATIONS

GROWING YOUNG BUSINESSES:

Young, fast-growing firms create most of the jobs in the United States. In New Jersey, only 5% of companies with 500 employees or more are less than 10 years old, compared with 11% across the United States. New Jersey attracts less venture capital per capita than peer states other states have created better environments for fast-growing young companies by improving access to capital through angel investing credits, setting up business incubators, and helping firms navigate state and local regulations.

IMPROVING TRANSPORTATION INFRASTRUCTURE:

Aging transportation infrastructure and congestion are a drag on productivity, raise the cost of doing business, and restrict worker mobility across the region. To help address the infrastructure problem, New Jersey could consider shifting more funding to long-term improvements, adopting methods for optimizing infrastructure spending, encouraging transit-oriented development, and taking additional steps to rebalance traffic flows.

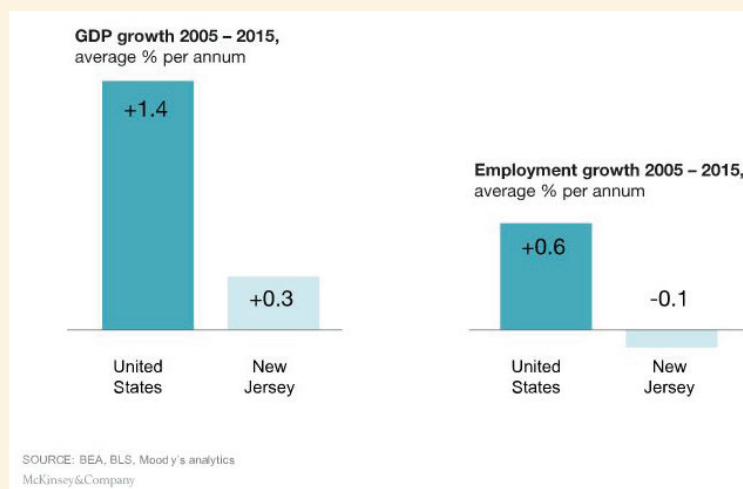
ADDRESSING WORKFORCE IMBALANCES:

The skills of the labor force in New Jersey are not well aligned with demand. There are more high- and low-skill workers in New Jersey than employers need, and more middle-skill jobs than qualified middle-skill applicants. The economy has shifted successfully from a heavy reliance on traditional manufacturing to services and advanced manufacturing (pharmaceuticals, for example), but relatively few of New Jersey's middle-skill workers (with less than a four-year post-secondary degree) are qualified for

the middle-skill jobs that are available today, such as health technicians, construction service workers, heavy vehicle maintenance, and retail managers. New Jersey could increase the supply of "job-ready" middle-skill workers by expanding access to vocational training, partnering with companies to tailor college curricula, and putting in place other measures to train workers in skills demanded by the private sector.

TAILORING INCENTIVES FOR GROWTH:

New Jersey's capital outlays (for building construction, land alterations, and infrastructure expansion, etc.) and business development efforts have had relatively modest impact on growth. In an average deal, New Jersey pays ~5x more for each job affected and ~6x more per dollar of investment attracted than peer states. Over 80% of incentive deals are geared to older domestic companies, even though younger firms and foreign companies, on average, invest more capital in operations and create more jobs. Other states have gotten higher returns by continuously monitoring the economic gains from their investment, enforcing claw-back provisions for incentives that do not produce returns, and focusing investment in industry clusters where young companies can blossom.



Source: *Reseeding growth in the Garden State*: McKinsey Global Institute

SPOTLIGHT: CONNECTIONS 2040 PLAN FOR GREATER PHILADELPHIA BY THE DELAWARE VALLEY REGIONAL PLANNING COMMISSION

CORE PLAN PRINCIPLES

Connections 2040 is built around four core principles to help achieve its vision:

- Manage Growth and Protect the Environment
- Create Livable Communities
- Build the Economy
- Establish a Modern Multimodal Transportation System

PRINCIPLE: MANAGE GROWTH & PROTECT THE ENVIRONMENT

Open space, natural areas, farmland, and historic resources are indispensable to our region and its residents. However, many of these resources are endangered by sprawling development patterns. Connections 2040 recognizes that the continued loss of these resources is not sustainable, and the need to accelerate and coordinate growth management and resource protection activities is urgent.

PRINCIPLE: CREATE LIVABLE COMMUNITIES

The region will gain over 630,000 residents and 318,000 jobs by 2040--an 11% increase since 2010. If current trends continue, the majority of this growth will occur at the periphery of the region--increasing suburban sprawl, creating the need for expensive new infrastructure and underutilizing existing facilities, and

contributing to the further disappearance of our open space and the depletion of natural resources. Instead, these issues can be averted through focused investment and redevelopment to create more compact, mixed use, livable communities within and around established Centers.

DVRPC'S CENTERS-BASED PHILOSOPHY:

- Livable communities can be found throughout the region: in Core Cities; their neighborhoods; older suburbs; and in town and rural Centers. The Plan identifies a Metropolitan Center (Center City/Camden) and six Metropolitan Subcenters, including downtown Trenton, King of Prussia/Valley Forge, the International Airport, the Navy Yard/Sports Complex, Cherry Hill/Mount Laurel/Marlton, and the Route 1 Corridor (Mercer County).
- Livable communities can be created and supported by investing in and redeveloping Centers; Connections 2040 envisions numerous thriving, compact, mixed-use Centers. Investing in Centers facilitates the most efficient use of infrastructure, conserves open space and natural resources, strengthens local economies, and creates the densities to support walking, biking, and public transit.

PRINCIPLE: BUILD THE ECONOMY

Philadelphia's regional economy, with an annual gross metropolitan product of over \$380 billion, ranks among the most diverse of the nation's major metro areas. Although not booming, the economy is resilient, protecting the region from extremes in growth or decline that economies dependent on one or two major industries often experience.



**MANAGE GROWTH
& PROTECT THE
ENVIRONMENT**



**CREATE LIVABLE
COMMUNITIES**



BUILD THE ECONOMY



**ESTABLISH A MODERN
MULTIMODAL
TRANSPORTATION
SYSTEM**



DVRPC'S ECONOMIC DEVELOPMENT PLANNING PHILOSOPHY:

- The Connections 2040 Plan reiterates the goals and strategies of the adopted regional comprehensive economic development strategy (CEDS), the Commonwealth of Pennsylvania's Keystone Principles for Growth, Investment, and Resource Conservation, and the economic strategies advanced in New Jersey's State Strategic Plan.
- Invest in Centers, to facilitate the most efficient use of infrastructure; conserve open space and natural resources; provide employers with easy access to supplies, markets, and a qualified workforce; and create concentrations of "knowledge density."
- Support the growth of key economic sectors and locations within the region.

PRINCIPLE: ESTABLISH A MODERN MULTIMODAL TRANSPORTATION SYSTEM

Connections 2040 envisions a seamless multimodal passenger and freight system that is safe; convenient; sufficient in its capacity; attractive and affordable to its users; accessible and equitable for all citizens and visitors to locations throughout the region; and incorporates sound growth management, urban revitalization, and environmental and economic competitiveness planning principles. Greater Philadelphia enjoys a tremendous advantage by virtue of its location in the middle of the Northeast Corridor, but needs to address several challenges to continue to take advantage of this locational benefit in the future. Maintaining and improving key interstate and interregional highway and transit routes is imperative, as is upgrading the region's airport, port, and intercity rail facilities, which serve as our links to the rest of the nation and world.

DVRPC'S TRANSPORTATION PLANNING PHILOSOPHY:

The transportation investment priorities are:

- 1) Preserve and maintain the existing transportation system and rights of way;
- 2) Improve the operation of existing transportation facilities; and
- 3) Increase the capacity of the existing multimodal transportation system, limiting the addition of through travel lanes.

The role of new technology in transportation must be recognized. Future improvements will lower costs, reduce emissions, improve safety, and make vehicles more efficient and reliable. In the future, vehicles may be powered by a variety of energy sources; remote sensors will impact adaptive traffic signals and the monitoring of bridge and road conditions and repair needs. Continued growth in telecommuting and e-commerce will greatly impact regional travel patterns. Connected cars communicate with other vehicles and warn drivers of upcoming traffic conditions. This vehicle-to-vehicle communication will be used in driverless cars. As self-driving cars become more common, they will be able to travel closer together. Driverless cars could alter the vehicle ownership model, with a decrease in privately owned cars and an increase in shared vehicle ownership. This could revolutionize the carsharing model, and by removing the sunk costs of automobile ownership, other modes may benefit.

SPOTLIGHT: GREATER PHILADELPHIA FUTURE FORCES BY THE DELAWARE VALLEY REGIONAL PLANNING COMMISSION



As a first step in updating its regional plan (CONNECTIONS 2040), DVRPC researched key forces likely to impact the Delaware Valley's future. Five forces were identified and some implications considered:

ENDURING URBANISM

Millennials and empty nesters moving back to walkable urban centers are the start of a long-term trend, as future generations show an even stronger desire for city living and walking, biking, and transit.

IMPLICATIONS:

- Young adults (20–34 years old) continue to flock to the region, and there are fewer persons per household.
- Population grows around dense regional centers but declines slightly in farther-out suburbs.
- Increase in walking, biking, and transit trips.
- Significant push to fully pedestrianize main streets, while adding protected bike and pedestrian infrastructure to all roads (except highways).
- Demand increases for new types of housing, such as micro apartments.
- Urban schools slowly close the quality gap, reducing the push of families with children to the suburbs.

THE FREE AGENT ECONOMY

Individuals must create their own economic opportunities and contribute more toward their healthcare and retirement, as labor efficiency and the rising cost of full-time employees cause large companies to continue to reduce their workforces.

IMPLICATIONS:

- Population is more transitory, as people constantly move in search of economic opportunity.
- New development centers emerge around universities, which become the creators and incubators of new businesses.
- Fewer 9-to-5 work schedules harm transit agencies' ability to effectively deliver service.
- Strong desire for low-cost transportation options, pushing a move toward Complete Streets, which safely accommodate all users.
- Demand grows for co-working space.
- 3-D printing, automation, and robotics brings more local manufacturing back to the region.



SEVERE CLIMATE

Increasing atmospheric carbon levels, due to continued global use of fossil fuels, lead to significant disruptions from climate change. The region must prepare for hotter and wetter weather, more frequent and intense storms, and rising sea levels.

IMPLICATIONS:

- Region receives some in-migration from other regions that are more severely impacted by climate change.
- More infill development and increased density in regional centers.
- Movement away from major rivers and floodplains.
- Slower growth in trade and goods movement.
- Extreme weather shortens transportation infrastructure lifespans and increases maintenance costs.
- The need to rebuild and make infrastructure more resilient limits other investments that can encourage economic growth.

TRANSPORTATION ON DEMAND

Smartphones, apps, and real-time information help people get around using a multimodal network of car sharing, taxis, ride sharing, transit, biking, bike sharing, walking, and new modes such as on-demand micro transit bus service and ride sourcing, where a vehicle is e-hailed for a point-to-point trip.

IMPLICATIONS:

- Technologies allow workers to live anywhere and work remotely.
- Mix of infill development that occurs near transit access and regional centers, and more traditional suburban development.
- New transportation services, such as ride sourcing and micro transit, become major travel providers.
- New technologies, such as 3-D printing, nanotechnology, and better asset management, extend the lifespan of transportation infrastructure and lower its costs.
- A significant increase in zero-car households.
- Innovations in alternative energy sources lead to lower energy costs.

THE U.S. ENERGY BOOM

The region's economy grows with domestic natural gas extraction and distribution, and renewed manufacturing. An abundance of domestically produced energy keeps the cost of energy low and helps the region and the nation become more energy independent.

IMPLICATIONS:

- Population and jobs increase due to the energy hub and economic growth.
- Industrial growth reactivates the Delaware River waterfront, and spurs residential growth in areas with easy access to industrial jobs.
- Overall increase in freight moved by pipeline, train, and waterways.
- Low energy prices bring down the cost of building and maintaining transportation infrastructure.
- Fossil fuels remain the dominant energy source.

7. CONCLUSIONS: ECONOMIC OPPORTUNITIES AND CHALLENGES

Within the context of its employment and market trends, Cherry Hill Township enjoys numerous economic opportunities while facing some challenges.

OPPORTUNITIES

CHERRY HILL TRAIN STATION

Located behind the ShopRite at the Garden State Pavilions shopping center, Cherry Hill Station is an out-of-the-way and underutilized transit stop. While the station provides service to Philadelphia on NJ Transit's Atlantic City Line, train headways vary between an hour and two hours depending on the time of day. Travel time is a half hour to 30th Street Station. Vehicular access, parking, and signage for the station are limited.

The Cherry Hill Station is a significant transportation asset for the township and presents a tremendous opportunity for improving connections between Cherry Hill Township and Philadelphia. Through the future use of autonomous vehicles with ridesharing companies, the station could become a transit hub that directly serves the township's employment and residential nodes, effectively completing the "last mile" of the transit route with ride-hailing services (perhaps autonomous). In the meantime, a shuttle service could perform the same function. For this combined system to be successful, NJ Transit would need to increase its headways, at least during rush hour, to improve service between Philadelphia and Cherry Hill, though there may be some conflicts with freight trains that use the same rail line. The station should also be made more visible through site improvements and signage along S. Cornell Avenue.

CHERRY HILL MALL

Cherry Hill Mall is a very strong regional mall with its selection of upscale stores and restaurants. The most successful section of the mall is the southern side facing Route 38. However, within the northern wing closest to Church Road, stores are not as upscale and successful. At the same time, the parking lot in this vicinity remains relatively vacant most of the year.

Area developers and brokers concur that an opportunity potentially exists to redevelop the area on the northern end of the mall. Adjacent parcels along Church Road

could also be considered for redevelopment. This effort should be coordinated with improvements to the smaller properties on the west side of Haddonfield Road. The entire area could be proposed as a designated redevelopment area. Enhanced service to and from the Cherry Hill Station to the mall area would greatly benefit this development as well.

VISIBLE COMMERCIAL CORRIDORS

As noted above, three commercial corridors—Route 38, Route 70, and Haddonfield Road--serve as regional commercial spines traversing Cherry Hill where their visibility impacts the regional perception of Cherry Hill. Key portions of these corridors are in need of attention and offer the opportunity for both increased property values and improved overall perception of the economy of Cherry Hill. Segments that could be readily enhanced include:

- Route 70 Between Union Avenue & Hampton Road, where the only active uses are a car wash and a small auto body shop. This area abuts and fronts the Executive Campus office complex.
- Route 38 Between Longwood Avenue & Haddonfield Road where vacant lots and more marginal business uses abound, offering the potential for redevelopment or reuse for an overall stronger corridor economy. Key opportunities include several vacant parcels, as well as current auto service facilities and a few vacant buildings.
- West Side of Haddonfield Road North of Route 38 where, to achieve maximum benefit from adjacency to the Mall, this area could benefit from a more uniform appearance.
- Erlton Shopping Center on Route 70 which could have a more "Main Street" type improvement that would integrate the many successful businesses there with new ones brought to fill the few, but visible vacancies. Shared parking and streetscape enhancements that both evoke the retro character of the district.

More generally, these corridors would benefit Cherry Hill with visible gateways at the entrances to Cherry Hill, improved standards for uses, facades, and signage for homes converted to business use, as well as stronger standards for landscaping, screening, and auto storage for automotive businesses. This might include

////////// a distinctive “Cherry Hill look” that enhances the appearance of the valuable auto dealerships.

KEY REDEVELOPMENT SITES

While some communities would consider vacant buildings or parcels a challenge, they instead present redevelopment opportunities in Cherry Hill Township due to its robust economy. Real estate brokers and developers seem to agree that buildings and parcels do not remain vacant in Cherry Hill for very long, and suggest that good buildings in good locations get filled or redeveloped relatively quickly. A successful example is Penn Medicine’s redevelopment of the former Sym’s store. Several key existing or future redevelopment opportunities in the township include:

- Subaru headquarters: Subaru will vacate its headquarters building entirely when it moves to Camden. This building has been discussed as market-rate rental housing and senior housing.
- Route 70 parcels: In addition to the vacant parcels between Union Avenue and Hampton Road noted above, the vacant former Lockheed Martin building (recently purchased by Cooper Hospital) has additional redevelopment potential. This area – and the entire Golden Triangle – could take better advantage of its proximity to the Cherry Hill NJ Transit station for transit-oriented mixed-use development.
- Executive Campus: Just off Route 70 at Cuthbert Boulevard, six dated office buildings (900,000 SF) comprise the Executive Campus surrounded by additional developable land to the north and east that could supplement the above development opportunities along Route 70. Current space offerings at \$12-\$14 gross plus electric are at the very lowest end of the office market as is the sale of 3 Executive Campus in the past three years for less than \$70 per SF.
- Victory Refrigeration site: This large cleared parcel across from the Woodcrest Corporate Center is a significant transit-oriented development (TOD) development opportunity due to its proximity to the Woodcrest PATCO station and I-295. The parcel has been considered for apartments as well as a mixed-use concept including a hotel as part of a TOD study of the station area.

UNIVERSITY SATELLITE CAMPUS

Of the 83,000 new education jobs created in New Jersey from 2002 to 2014, only 300 were in Cherry Hill Township. While Camden County College has a large facility in the township, it is not considered to be a vibrant outpost of the college. The township has an opportunity to reposition itself as a center for education and training by recruiting an area higher-ed institution to establish a satellite campus in Cherry Hill. With the location and expansion of several hospitals in the township, a university affiliated with one or more of the hospitals could be considered. Jefferson’s affiliation with Kennedy Health System could offer particularly interesting opportunities given Jefferson’s recent merger with Philadelphia University.

CHALLENGES

INDUSTRIAL PARK

The under-occupied industrial park flanking the New Jersey Turnpike and I-295 presents a challenge to the Township. While the park contains many thriving businesses, it has evolved into an eclectic mixture of uses, including the Garden State Discovery Museum, Cherry Hill Skating Center, the Amazing Escape Room, and the Gymnastics and Cheerleading Academy. Several vacancies exist in the park while rents have been flat at around \$5.00 per SF.

TOWNSHIP IDENTITY

A common perception of Cherry Hill Township is that “there is no there there”, or that the township doesn’t have a defined traditional downtown. The area most resembling a Main Street is Earlton in the area along Route 70 between Cooper Landing Road and Kings Highway. However, this area needs physical improvements to both the public and private realms for it to reach its potential as a defined place.

CAR DEALERSHIPS

Cherry Hill Township is home to a substantial number of car dealerships. As sales increase for certain brands, some dealers are seeking additional land to expand their footprint, particularly for storing inventory close their dealerships. In most cases, additional land simply does not exist in the township to accommodate this expansion. Furthermore, some dealers have experienced conflicts with adjacent land owners,

particularly homeowners in areas where dealerships abut residential areas.

ZONING

Zoning is also a challenge in the township, according to developers. Some think zoning should be changed in specific locations to encourage development and redevelopment without requiring variances. Examples include Greentree Road across from the Springdale Shopping Center – currently zoned residential but would be better for commercial or institutional uses. Another example is 3rd Avenue near Haddonfield Road. The area is zoned Highway Business (B2). The residual industrial uses in that location are no longer permitted and will likely convert to other uses eventually.

AUTOMOBILE DEALERSHIP FRONTAGES & CAR STORAGE:

Cherry Hill's highly valuable automobile dealerships face a number of crucial competitive issues that impact land use concerns. First, these dealerships are under pressure from their manufacturers/distributors to locate on highly visible and accessible sites that attract customers. As a result these facilities seek prominent locations along the Route 38, Route 70, and Haddonfield Road corridors and invest heavily in attractive buildings. On the other hand, observation of the parking lot edges of these businesses suggests that they have not applied the same high standards of appearance to those edges. Improved site conditions could be encouraged by the township.

A second competitive condition is strongly impacting both the commercial corridors and adjacent blocks. Each dealership is under pressure to virtually instantly provide a range of vehicles—models, colors, accessory packages—in order to close transactions with potential buyers. To meet this demand, dealers now need to maintain broad auto inventories that are readily accessible from the dealership. These required inventories are often in excess of on-site storage capacities. As a result, nearby parking areas and vacant lots are being leased by dealers for off-site storage—often times creating “dead zones” on commercial corridors or conflicting with residential and community uses. A review of land use policies concerning such storage would be valuable for the township to identify the best approaches to maintaining the value of the township's auto dealerships while also minimizing the negative aspects of such off-site storage.



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III. LAND USE & ZONING

Information within this section provides analyses of current land uses patterns within the township, and discusses key issues faced by the township related to land use and zoning.

1. LAND USE

Cherry Hill's agricultural roots, post-war housing and entertainment/commercial boom, and growth as an office center are all reflected in its current land use.

LAND ALLOCATION

A review of the land allocation in Cherry Hill (Figure 38) reveals that almost half of all land in the township is dedicated to residential uses (4-units or less per acre) while only a small fraction (1.5%) is dedicated to multi-family housing. Cherry Hill's commercial and entertainment prominence is evident by the relative dominance of commercial uses in the Township. The lack of industrial land is notable, especially considering the regions eminent industrial past. However, this is likely a reflection of the strong agricultural history of Cherry Hill and more intensive industrial uses being located in communities with easier access to the Delaware River.

SEPARATION OF USES

As Cherry Hill rapidly developed, large-scale residential, office, shopping, and entertainment developers largely worked independently, each with their own values and interests. **The township grew under the principles by which the ideal post-war suburb was defined: stark separation of land uses; reliance on, and precedence given to, the automobile for all of life's needs; and low-density, horizontal or sprawling development.**

A review of the Land Use (Map 4) reveals large swaths of single family residential properties, especially south of the Turnpike. In the north of Cherry Hill - which developed earlier than the south and is closer to Philadelphia - there is a much higher concentration of commercial uses. In the north, commercial uses are more commonly found in close proximity to, or in some cases, interspersed into predominantly residential areas. Examples of this include neighborhood stores as found along Chapel Avenue north of Route 38 and Erlton or pre-existing non-conforming businesses and industrial uses located in neighborhoods such as Kenilworth.

The areas bounded by I-295 and Springdale Road north of Route 70 and I-295 and the NJ turnpike south of Route 70, are the only areas in the Township where large industrial properties concentrate. The easy access

Figure 38. Land Use Patterns in Cherry Hill

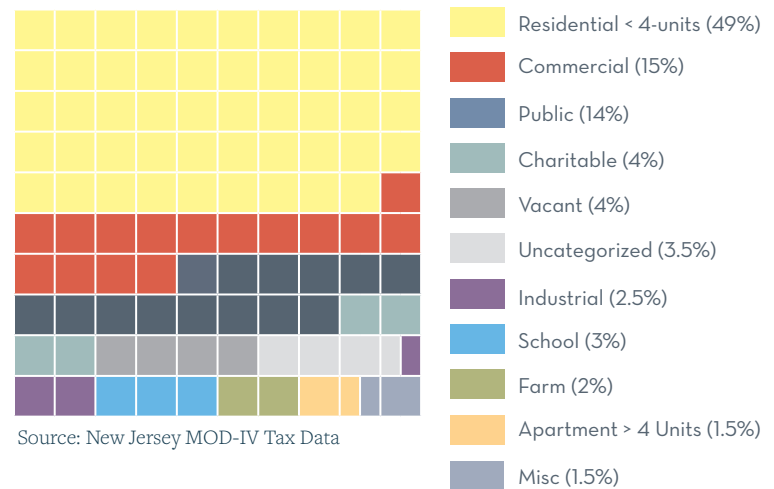
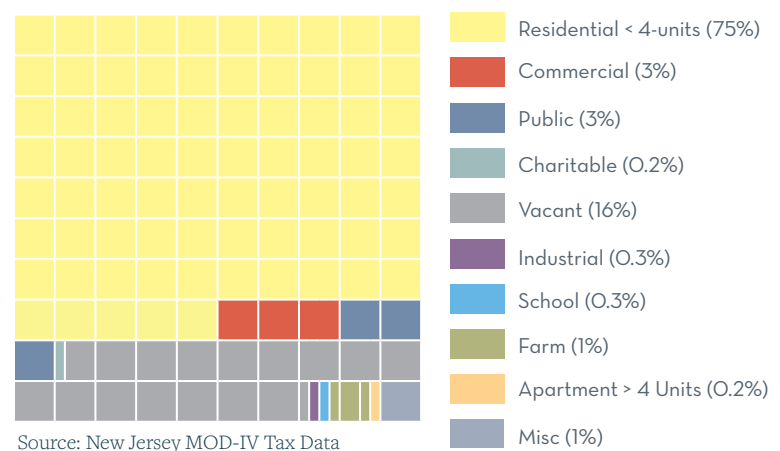
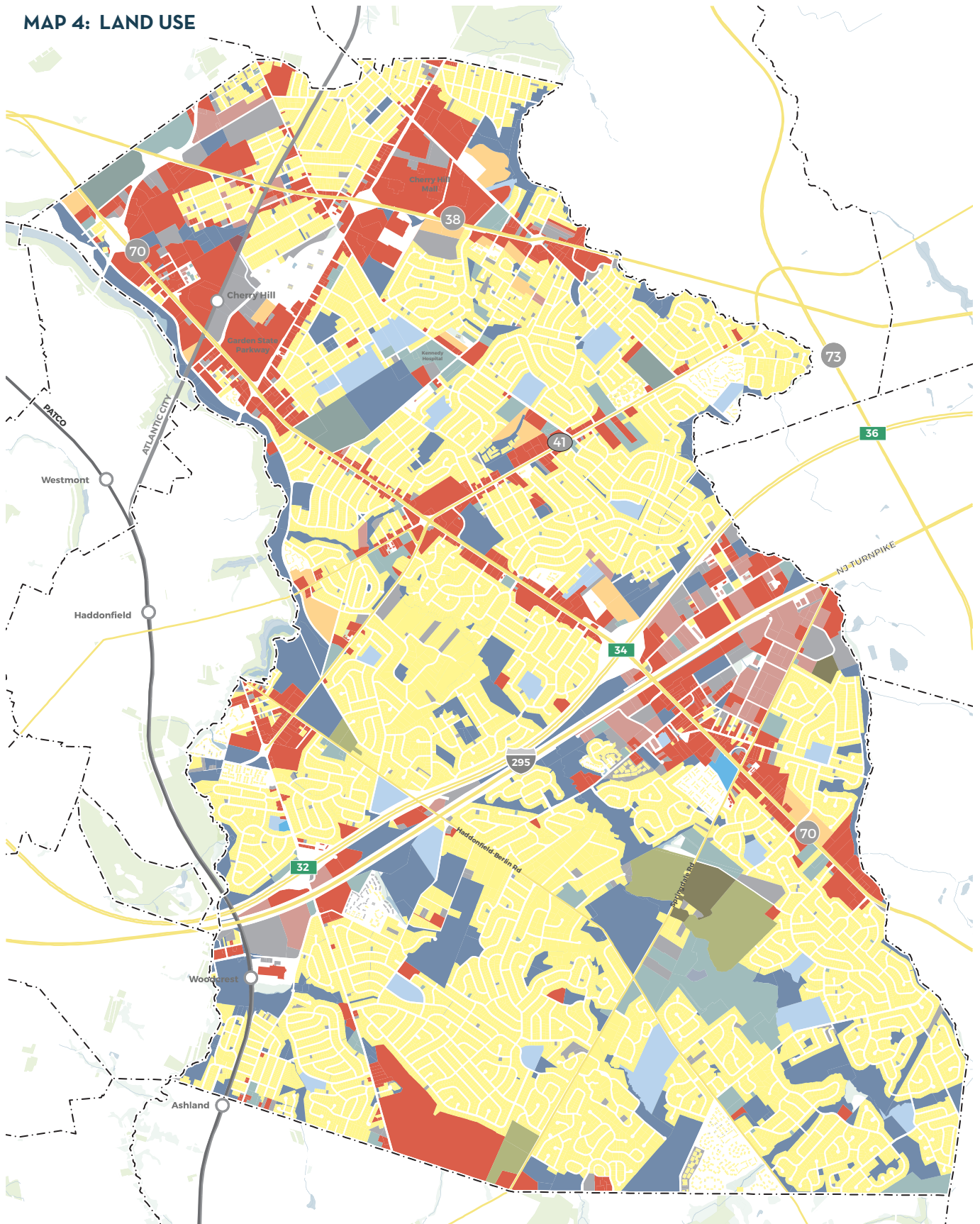


Figure 39. Land Use Patterns in Camden County



MAP 4: LAND USE



Vacant Land	Commercial	School	Cemetery
Residential	Industrial	Public	Miscellaneous
Farm	Apartment	Charitable	

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to highways at exit-36 and exit-34 make these ideal locations for businesses that require tractor-trailer and truck access to operate.

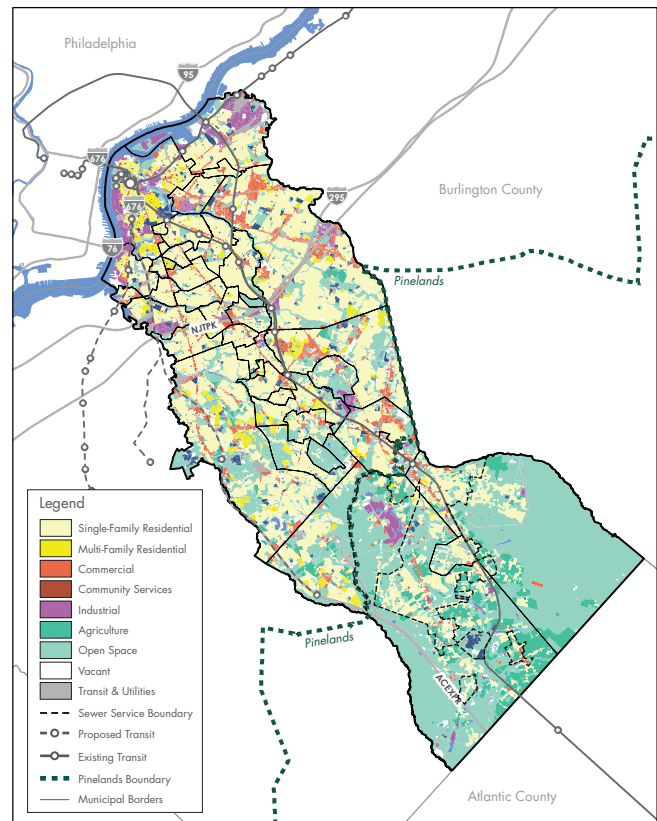
Finally, the Land Use map clearly illustrates the importance of retail corridors along the township's major thoroughfares. Route 70, 38, and 41 are almost completely dominated by commercial uses on both sides. Commercial properties that front along these commercial corridors account for 43% of all commercial properties in the township.

COMPARISON TO CAMDEN COUNTY

Similar to Cherry Hill, the county as a whole has very limited undeveloped and unprotected land remaining. Cherry Hill, and adjacent communities in Camden County are the oldest and densest in the county, and contain a greater share of the county's industrial and commercial land where development occurred first closest to the Delaware River, and subsequently, over decades, spread outward toward the Pinelands. Camden County as a whole only contains 3% Commercial uses and 0.3% Industrial uses, whereas Cherry Hill allocates 15% and 2.5% respectively. Residential Land Use in the county is also a greater percentage of land allocation than within Cherry Hill at 75% compared to 49%. The low-density residential land use pattern is likely the result of development patterns; the majority of communities developed adjacent to the NJ Turnpike and I-295 when they were completed in the mid-twentieth century, and maintain the residential and commercial characteristics of typical post World War II communities, with large lot residential neighborhoods and commercial clustered along main roads.

One of the characteristics of the county not well represented through New Jersey MOD-IV Tax data is the large share of the county's forests, preserved farmland, and open space, which is located primarily in the Pinelands and beyond in the county. (Figure 19). Although it is represented as vacant for tax purposes (16% land use), much of this area is protected and does not face development pressure. This results in pushing development pressure into other areas of the county, particularly areas like Cherry Hill which are located adjacent to major roadways and benefit from mass transit such as NJ Transit and PATCO.

Figure 40. Land Use Patterns in Camden County (2010)



Source: Camden County Master Plan Land Use Element

2. KEY LAND USE NODES

Cherry Hill Township's includes several land use nodes that require special attention due to their location, condition, tenure of buildings, or land use configuration. These nodes roughly overlap with the Key Employment Nodes and Commercial Corridors identified in the Economic Development Report but are not intended to correspond on a one-to-one basis.

THE GOLDEN TRIANGLE

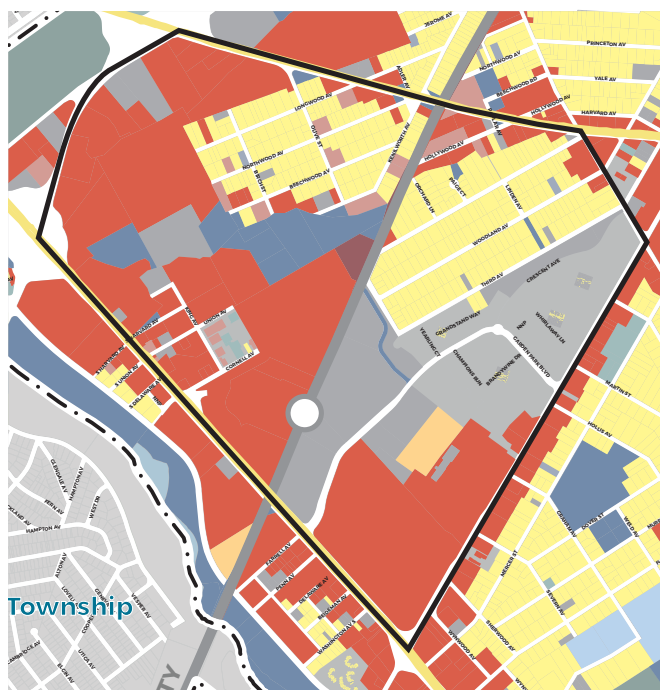
The Golden Triangle is located in the westerly portion of Cherry Hill Township near the eastern border of Pennsauken Township. The Golden Triangle contains approximately 700 tax parcels, and contains a variety of commercial, office, retail, residential, and light industrial land uses. Additionally, the area contains a significant amount of open space and recreation areas, including the county-owned Cooper River Park, and several township-owned neighborhood parks and freshwater wetland areas that contain informal passive recreation trails.

The Golden Triangle was the subject of a Vision Plan in 2010 funded by a Transportation and Community Development Initiative (TCDI) grant provided through the Delaware Valley Regional Planning Council (DVRPC). The report summarized a vision in the following six statements:

- The Golden Triangle will be a vibrant local and regional destination with a distinctive character that contains protected environmentally sensitive areas, and a complementary mix of commercial, residential, recreation, and community-oriented uses.
- The Golden Triangle will be connected by a network of safe and attractive streets and pedestrian linkages that include facilities for motorists, bicyclists, pedestrians, and enhanced public transit service.
- Route 70 will be a visually appealing gateway into Cherry Hill with a “boulevard feel” that will include a redesigned streetscape, improved signage, a safe pedestrian environment, and reduced speeds.
- The Golden Triangle will be an environmentally sustainable area with preserved open space, restored stream corridors, and eco-friendly development that incorporates state of the art green building techniques and renewable energy systems.
- The Cherry Hill Train Station will be an attractive, safe, user-friendly transit facility that has supportive land uses, pedestrian facilities, and improved passenger shelter.
- Kenilworth and Woodland will be safe, attractive, and viable neighborhoods that benefit from proximity to other parts of the Golden Triangle while maintaining their quiet, predominantly residential character.

Graphics illustrating this vision are presented on the following page.

Figure 41. Golden Triangle Land Use and Aerial



Legend for land use colors can be found on page 47



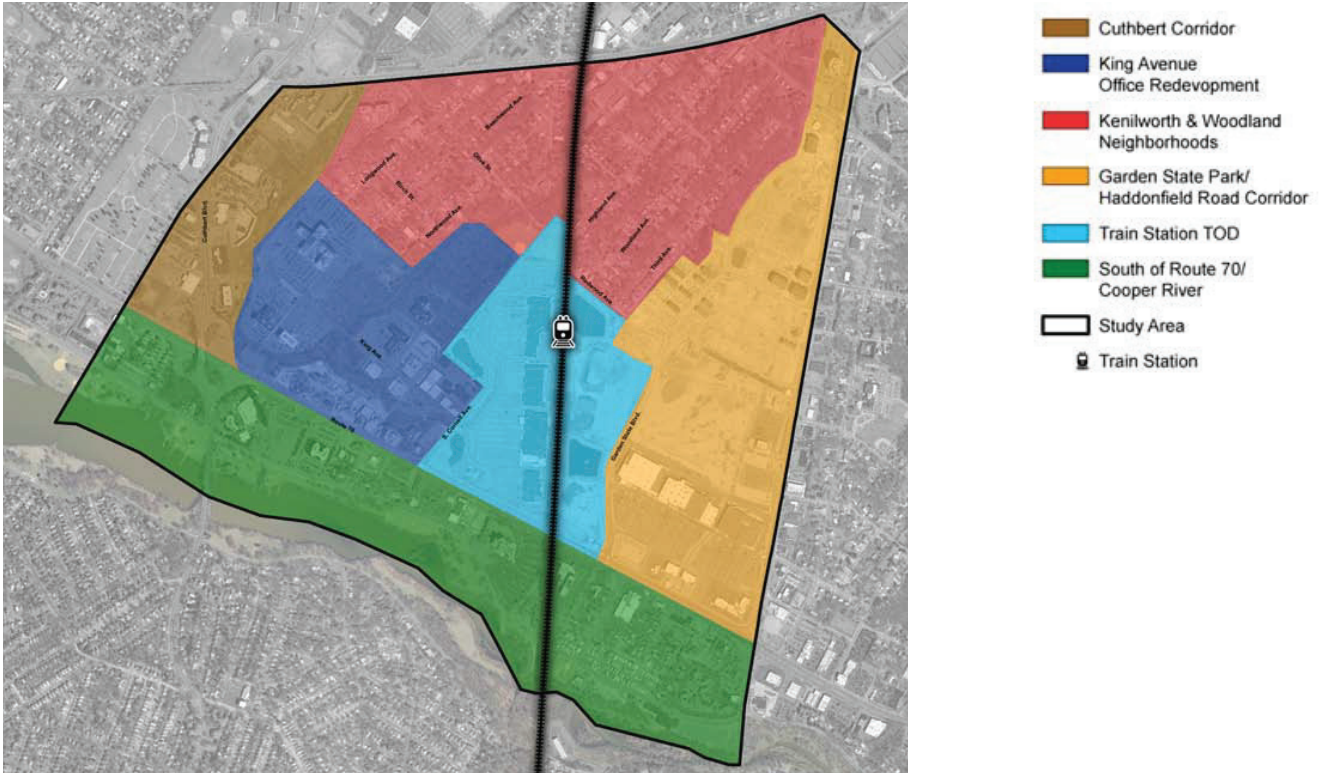


Figure 42. Vision for Route 70 from Golden Triangle Vision Plan (2010)



SPRINGDALE INDUSTRIAL AREA

The Springdale Industrial Area is a traditional light industrial area that consists primarily of large floorplate (typically between 50,000 and 100,000 square feet) one-story industrial buildings. Employee parking is typically accommodated in the front of the building with room for loading in the rear, side, and sometimes front of the building.

The area has increasingly accommodated a number of non-industrial commercial and civic uses, as demand for industrial spaces has diminished in Cherry Hill. Often this has resulted in property owners sub-dividing larger floorplate buildings and accommodating uses that have higher traffic volumes. For example, the Wine Room allows visitors to make their own wine, holds private events, and has food and wine seminars. The Garden State Discovery Museum is also located in the industrial areas, as is an “escape the room” business where visitors solve puzzles in order to “escape” themed rooms.

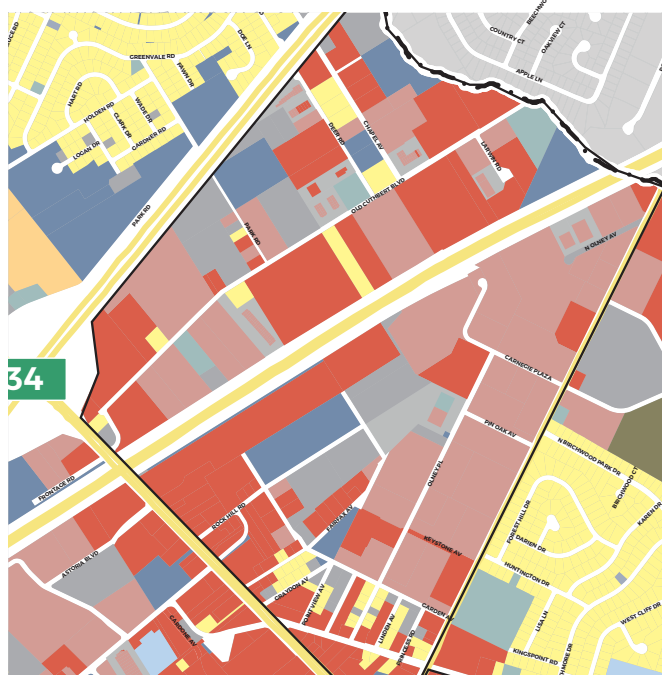
The industrial area is attractive to these types of users because of the flexible floorplate, few residential neighbors, and low rents. Nonetheless, the area was not originally designed for commercial purposes, let alone these types of hybrid uses that do not fit into traditional land use categories.

Figure 43. Examples of non-industrial uses occurring in the Springdale Industrial Area



Garden State Discovery Museum (top); Amazing Escape Room Cherry Hill (lower left); The Wine Room (lower right)

Figure 44. Springdale Industrial Land Use and Aerial



Legend for land use colors can be found on page 47



ERLTON VILLAGE

The Erlton Village is a small commercial center located on Route 70 near the intersection of Georgia Avenue. The area is the only commercial center in Cherry Hill that follows “traditional” land use patterns: small attached buildings (some only 25 feet wide) line the street creating an unbroken chain of facades. On one side of the street, parking occurs in the front yard and cars have to back out onto Route 70. On the other side, parking is provided in side and rear lots as well as on the street.

The area struggles in part because the traditional building forms front onto a high-volume high-speed arterial. Typically these types of buildings are successful on “main streets” and in neighborhood commercial corridors where traffic speeds are slower, which makes them more enjoyable to walk along.

The architectural character of the buildings is diverse and inconsistent. There is no defining feature that unifies the area: buildings facades use many different materials and color pallets; signs are of various sizes, material, and character; and some buildings have awnings while others do not.

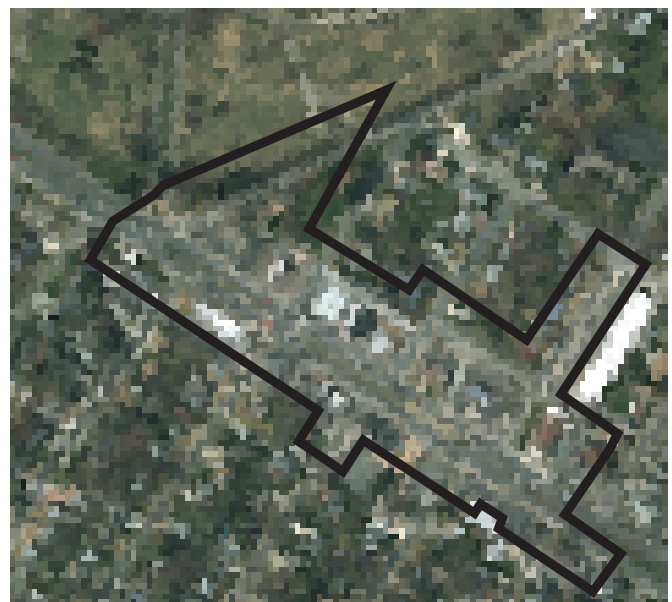
Figure 45. Erlton Village



Figure 46. Erlton Village land use and aerial imagery



Legend for land use colors can be found on page 47



KINGS HIGHWAY OFFICE PARK

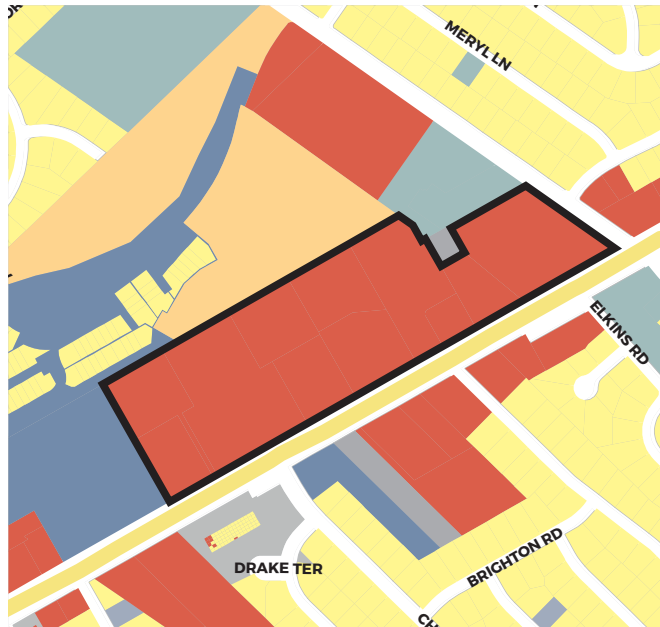
The Kings Highway Office Park is comprised of two to seven story office buildings surrounded by parking. The buildings are setback from the street and are not configured in a traditional “grid” as would be in an urban center. Instead, large parking lots make up the interstitial space between sporadically placed buildings.

Architecture is consistent with 1970s and 1980s suburban office buildings: many buildings use a large proportion of tinted colored glass with little ornament and relatively nondescript building identification. Despite the presence of sidewalks along Kings Highway, the area is not pedestrian friendly: there is no internal pedestrian circulation.

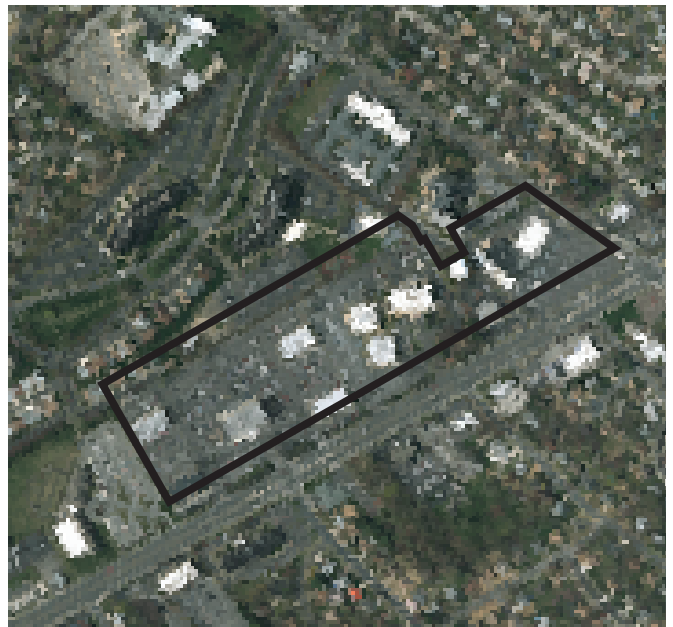
Figure 48. Kings Highway Office Park



Figure 47. Kings Highway Office Park land use and aerial imagery



Legend for land use colors can be found on page 47



CHERRY HILL MALL AND SURROUNDING COMMERCIAL AREAS

The opening of Cherry Hill Mall in 1961 was a seminal moment of the township's history. As the largest and most luxurious mall east of the Mississippi, and the first indoor mall in the Delaware Valley, the Cherry Hill Mall attracted shoppers and visitors from the entire East Coast. Ever since, it has been an icon in the region and continues to serve as a major economic driver in Cherry Hill. Recently, the mall has undergone some major transformations, including the addition of a "restaurant row" along Route 38.

Surrounding the mall are a number of commercial businesses that vary in their degree of quality. Along Haddonfield Road, mid-sized commercial properties are highway oriented with large parking lots. Facades are of moderate quality - there is inconsistent signage and a variety of materials are used. Front yards vary considerably. Newer retail has landscaped front yards while older retail tends towards parking in the front yard.

Larger footprint buildings line Church Road and are located in the shopping center east of Mall Drive. These commercial shopping centers front onto large parking lots and have tenants typical of their location and size.

The entire area is neither pedestrian friendly nor bike friendly. There is an oversupply of curb cuts, few sidewalks, poor internal pedestrian circulations, and no bike infrastructure.

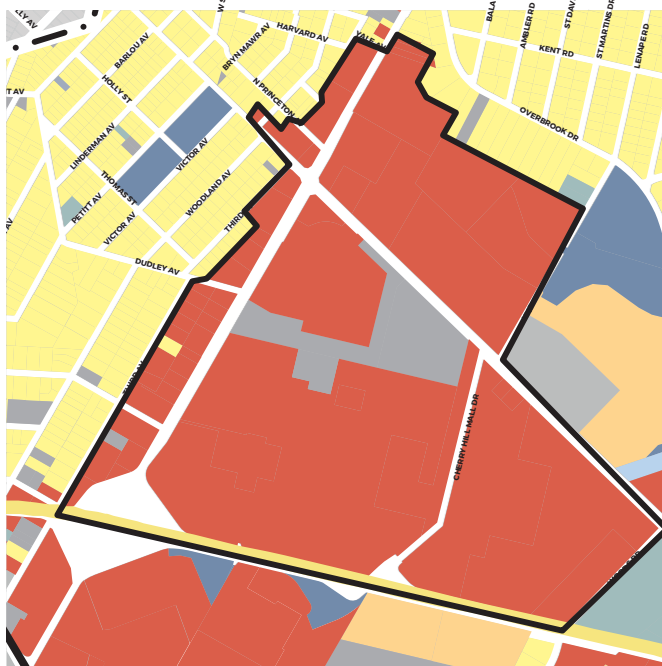
Figure 49. Cherry Hill Mall



Figure 50. Haddonfield Road Commercial



Figure 51. Cherry Hill Mall land use and aerial imagery



Legend for land use colors can be found on page 47



ROUTE 70 EAST

The section of Route 70 between Old Marlton Pike and Springdale Road is a hodgepodge of commercial, office, and multi-family residential.

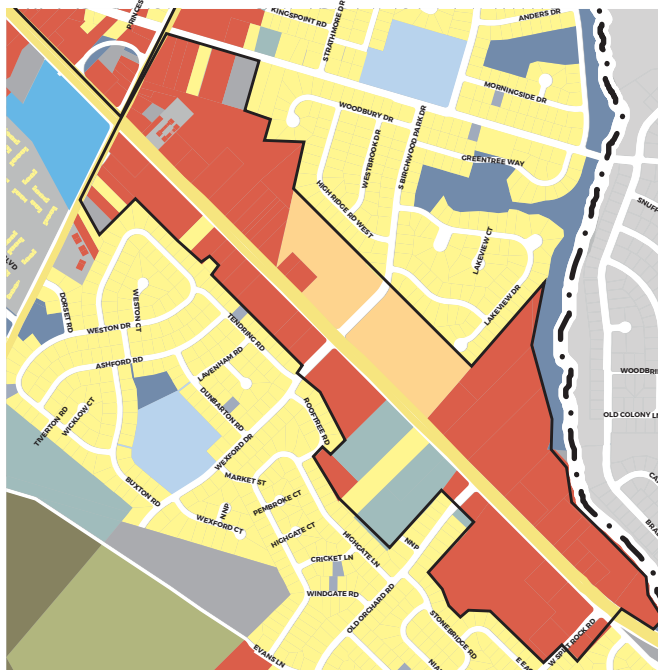
Large lot multi-family properties have a single entrance, are self contained, and offer no connection to adjacent lots.

Retail properties vary in size and quality. Larger lot single-use commercial properties, such as the Jaguar dealership, are interspersed with strip mall commercial centers that are home to a variety of retail uses. Without exception, the commercial uses have large parking lots that front onto Route 70, and the buildings themselves are setback anywhere from 60 to 300 feet.

This stretch of Route 70 is also home to a number of two to three story suburban-style office buildings. These buildings typically have side and rear yard parking, with front yards that are landscaped.

Overall, the corridor has little cohesiveness or identity. The construction median is grass panel with no trees or identifying features. The large setbacks give the street an open, undefined quality. The more than 1 mile of completely straight street contributes to this lack of interest, creating a sensation of just passing through a placeless landscape.

Figure 52. Route 70 East land use and aerial imagery



Legend for land use colors can be found on page 47

Figure 53. Development along Route 70



BATESVILLE TRIANGLE

The Batesville Triangle is roughly defined by Brace Road, Kresson Road, and Haddonfield-Berlin Road. The area is predominately retail commercial, although there is a smattering of residential properties nearer to the intersection of Kresson Road and Haddonfield-Berlin Road.

A large shopping center sits at the eastern side of the intersection of Brace Road and Haddonfield-Berlin Road. This shopping center is auto-centric with a large parking lot separating the road from the buildings. A mix of smaller single-use commercial properties and a smaller strip mall commercial center make up the remainder of the commercial properties, which again are auto-oriented and typically have parking in the front yards.

On the northern end of Haddonfield-Berlin Road, front yards gradually become more landscaped with higher quality plantings, and the areas starts to have a more residential character. Kresson Road too becomes more residential in character as one moves north towards the intersection with Haddonfield-Berlin Road.

Both shopping centers have suffered from a high level of vacancy and turnover. New residential development in the vicinity is spurring renewed interest in retail opportunities in the area.

Figure 55. Development in Batesville Triangle

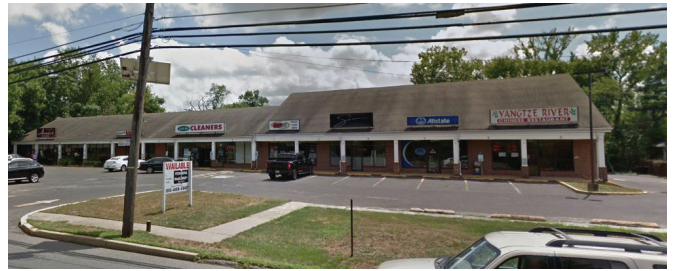
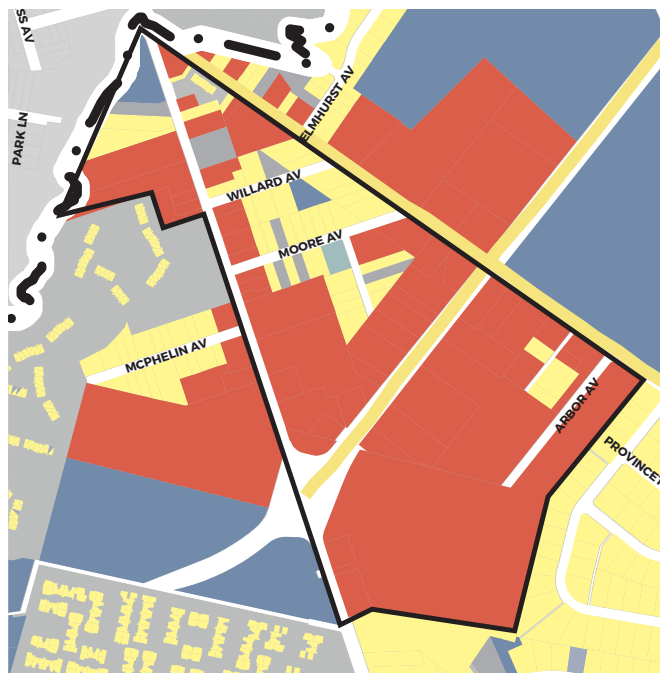


Figure 54. Batesville land use and aerial imagery



Legend for land use colors can be found on page 47



3. ZONING

The existing zoning ordinance for the Township of Cherry Hill, officially cited as the “Cherry Hill Township Zoning Ordinance (2013-18 as amended)” has been periodically updated. However, many of the zones have not been significantly modified since the 1950s. As a result, the zoning ordinance include provisions for solar panels while also allowing for furriers and video rental shops.

The zoning ordinance is evaluated in this Master Plan from two perspectives:

- Are the standards and regulations of the ordinance consistent with the goals and objectives of the Master Plan? Stated differently, if enforced, would the standards produce change in the township that will be well received by residents?
- Are the standards and regulations working for all those involved in the development process? Investigating this question probes whether the standards are placing an undue burden on anyone in the development process, including the township, neighbors, and applicants.

A review of the current zoning ordinance, site visits, demographic and market analysis, and stakeholder and public outreach suggest a number of key zoning issues which should be resolved. The following four zones have factors that have substantially changed since the adoption of the last Master Plan and will require modifications:

- IR: Industrial Restricted Zone (\$419)
- B4: Regional Business Zone(\$417),
- B2: Highway Business (\$415)
- IN: Institutional Zone (\$418)

In addition to issues with specific zones, this section identifies issues with the administration of the zoning ordinance as well as “housekeeping” issues that are important but will not require substantial changes to the use and bulk standards.

INDUSTRIAL RESTRICTED ZONES (IR) IS TRANSITIONING AWAY FROM STRICT INDUSTRIAL USES

CHANGING MARKET

As noted in the Economic Analysis, demand for light to moderate industrial uses is shrinking in Cherry Hill. This is particularly relevant in the IR areas located along Springdale Road and Old Cuthbert Rd.

Within the Industrial Restricted Zones (IR), many existing structures can no longer accommodate the types of uses which typically existed within the zone (manufacturing, etc.). The layout of the structures are unsuitable for many modern manufacturing/ warehousing standards, due to conditions such as low ceiling heights and small footprints. The availability of larger more modern facilities with better transportation connections in other municipalities is also a likely factor attracting industrial uses to locate elsewhere.

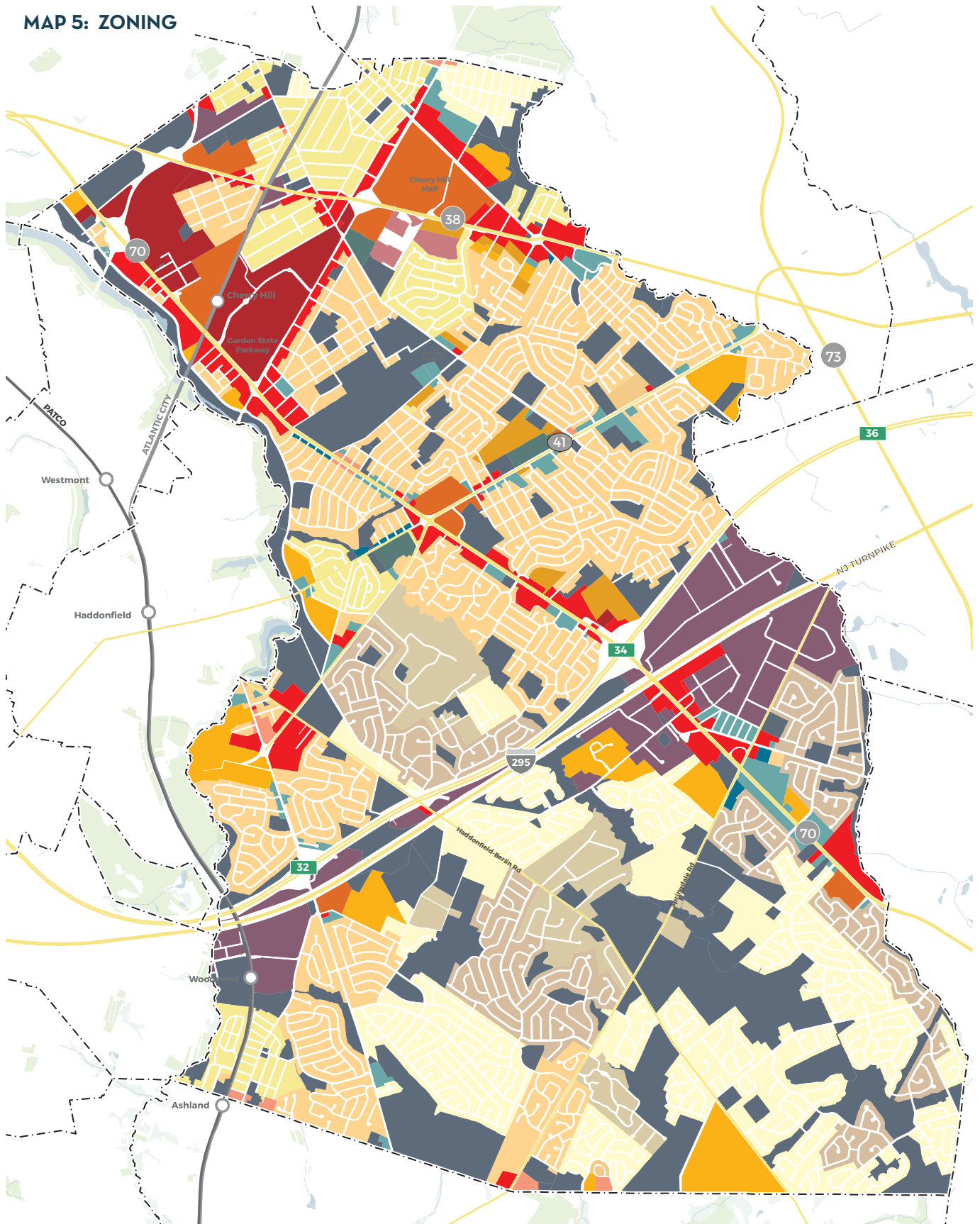
NEW USERS

As a result, industrial lands in Cherry Hill are becoming more attractive to other non-industrial users. Property owners have converted buildings, or portions of buildings, into office, commercial, and retail uses. The ordinance permits retail sales in industrial zones as an accessory use as long as it does not exceed 20% of the gfa not to exceed 5,000 sf. Religious institutions and non-profits have also started locating within the IR zones. Rents in the industrial zones are affordable which increases their appeal to non-industrial uses who are looking for larger spaces and do not need to be highly visible. This has caused a condition where buildings once designed for single user occupancy are being subdivided into multi-tenant - and often mixed-use - office, commercial, civic, and retail spaces.

At the same time, “industrial” uses are changing in the modern economy, blurring the line between what has typically been defined as industrial and retail. For example, some industrial uses allow customers to come and shop while maintaining an overwhelming industrial quality to the space.

The following are examples of uses that are currently located in the zone but are not traditionally associated

MAP 5: ZONING



with industrial uses (those marked with an * are not currently permitted in the IR Zone):

- Doggy Daycare*
- Religious*
- Schools*
- Winery (with retail)
- Brewery (with retail)
- Museum
- Physical Therapy
- Fitness Centers
- Roller Skating Rink

The following uses were granted a use (d) variance between 2012 and 2016: wholesale landscaping yard, used car auto sales business, after-school learning center, a barn building for the Fire District, and a coffee storage silo.

Religious institutions and non-profits have found the zone attractive due to the availability of large buildings with affordable rents.

The township has also seen interest in locating a hotel within an area currently zoned as Industrial Restricted (IR). It is possible that the Industrial Restricted Zones are attractive to these uses because they are located at key gateway points to the township, and adjacent to key roadway networks, appealing to uses which are not industrial in nature, but rely on access to transportation and high visibility from roadways.

Light Industrial uses are also increasingly blurring the line between industrial and retail, with some uses allowing customers to come and shop while maintaining an overwhelming industrial quality to the space. This is particularly true of breweries and similar outfits.

Additional growing industries which may be suitable new uses within the Industrial Zones, such as healthcare and assisted living, also continue to show interest in moving businesses into Cherry Hill. The township must find an appropriate way to balance these interests.

Finally, the Industrial Restricted Zone does not currently permit personal services and offices.

PARKING & ACCESS

As a result of these changes, the parking and access to the buildings has become more complicated. Many of the industrial buildings were not typically built to provide parking for customers. As buildings are

subdivided, new spaces are often created in the back or side of what were once single use buildings. As a result, access to these areas is occurring through former loading zones or parking lots, and/or parking once meant to serve the entire building is located far away from current uses.

WAYFINDING

The addition of multi-tenant buildings complicates wayfinding, especially as new businesses are tucked into the backs of buildings. This has made the area more disorganized and complicated circulation.

CODE COMPLIANCE

The proliferation of more subdivided buildings has made it more difficult to ensure that buildings meet fire code requirements. Of particular note, some owners are not aware that they are required to have an inspection when they subdivide and add a new tenant.

CONSIDERATION FOR NEXT STEPS

The township should consider working with residents, property owners, business owners and other stakeholders to create a clear vision for the parcels currently zoned IR. The township must then update the zoning ordinance to reflect that vision. The vision and subsequent amendments must allow for economically feasible uses that meet stakeholders' vision.

AREA ALONG CUTHBERT BOULEVARD AND ROUTE 70 IS HINDERED BY REGIONAL BUSINESS ZONE (B4) DESIGNATION

The Regional Business Zone (B4) was written to be suitable for redevelopment of the racetrack site. However, it has also been applied to the area along Cuthbert Boulevard and Route 70. The complicated regulations that were intended to guide a large redevelopment site are not appropriate for an area that has multiple property owners and does not have the type of coordinated development program that exists on the former racetrack.

Part of the issue stems from the complexity of the B4 zoning language. The use of various categories of Retail, Office, Restaurant and Residential categories (e.g. Office A, Retail B, restaurant C, Residential A) makes it difficult for a layperson, let alone a trained professional,

to understand what can be built in these areas. Table 4.1 of the ordinance that dictates the density standards, only adds to the confusion already created by the use categories. The Bulk Requirements for this zone also provide the township little opportunity to enforce its stated goal of encouraging, “a comprehensive approach that encourages compact and mixed-use development that is supportive of transit and pedestrian travel.” (\$417.A) For example, a 30 foot front yard, 20 foot side yards, and 30% maximum building coverage is unlikely to produce “compact” development nor is it guaranteed to produce particularly attractive walking environments. The bulk standards also fail to address the form of buildings and how they relate to the street, open spaces, or transportation infrastructure. Moreover, the ordinance lacks language that would support multi-modal transportation enhancements.

The complexity of the B4 zone was noted in the 2013 Zoning Board of Adjustment annual report, “Based on the complexities of the Regional Business (B4) Zone, it is suggested that this zoning district and the applicable density standards be amended to reflect existing conditions and provide for redevelopment opportunities that reflects the intent of a mixed use zone.” This recommendation was likely the result of an application by Modernfold Styles Inc to permit an office and warehouse use for a company that develops wall partitions along with signage. The list of sections where relief was sought and granted (17-B.F; 417-B.D; 517-A.G(3)(b)(i); 517-A.C(3)(b); 510-A.B(1); 513-A.B(6); N.J.S.A. §40:55D-70d1&5) indicate the complexity of the regulations of the B4 zone. It is likely that the language of that zone made such an application difficult to interpret, from both a township and applicant position.

CONSIDERATIONS FOR NEXT STEPS:

- The township should consider working with residents, property owners, and stakeholder to create a clear vision for the parcels along Cuthbert Boulevard and Route 70. The township can then update the zoning ordinance to reflect that vision. The vision and subsequent amendments must allow for economically feasible uses that meet resident’s vision.
- The township should examine rezoning the parcels not directly associated with the Racetrack’s

redevelopment. For example, a B3 designation with an overlay ordinance would promote mixed-use, multi-modal, compact development.

THE B2 ZONE IS UBIQUITOUS ALONG COMMERCIAL CORRIDORS AND DOES NOT PROMOTE HIGH-QUALITY PLACES

The B2 Zone abuts most major corridors. The zone is defined, in part, by its permissiveness. The zone allows for most office uses, a wide swath of retail uses, personal services, services, as well as recreation uses. That said, non-office commercial uses dominate because they are the uses that produce the highest rent and are in the most need of highly visible corridor access.

The zone lacks important design standards, leading to a sense of “placelessness”: Many corridors have no special relationship to the surrounding community or architectural history of Cherry Hill. One could be dropped along these streets and feel like you were anywhere in New Jersey. This is driven in part by the varying sizes of the lots that make the area inconducive to large-scale redevelopment. Moreover, many of these uses are inadequately served by pedestrian infrastructure, making them difficult to access by any means other than an automobile.

One area of specific concern is the area zoned B2 adjacent to the Cherry Hill Mall (along Haddonfield Road and Church Road). Haddonfield Road and Church Road are important corridors in the City. Yet the uses along these roads near the Cherry Hill Shopping Mall deteriorate into a confusing mixture of use with no strong architectural character.

CONSIDERATIONS FOR NEXT STEPS:

- The township should consider façade and frontyard design guidelines for commercial corridors to strengthen place characteristics.
- The township should consider specialized signage guidelines for some or all of the corridors. The township has a rich history of architectural signage. The use of “retro” design principles pulling from the 1950s -1970s has the opportunity to establish place character that speaks to Cherry Hill’s commercial history.

- The township should consider “Area In Need of Rehabilitation” designation for some corridors to provide tax incentives for property owners to improve their buildings.
- The township should consider implementing a form-based code approach along corridors that would provide an opportunity to regulate the relationship of the buildings to the street.

THE PARKING STANDARDS OF THE B2 ZONE PROHIBIT REUSE OF NON-CONFORMING PRE-EXISTING USES

The parking requirements are problematic for strip-shopping centers in the B2 Zone. When a space converts to a new use, the Township requires that the entire shopping strip be re-evaluated to determine if sufficient parking is available. This requires assessing the parking requirements for each of the uses in the shopping center. Since many shopping centers were approved decades ago, and many of those approvals are long lost, it is almost impossible to tell what standards were originally applied, whether a variance was granted, and if the shopping center continues to comply. The only solution is to apply the current standards, which have almost certainly changed.

The re-evaluation process for parking standards is seen as a common “stumbling block” by commercial property tenants who are looking to acquire or lease a property.

The parking requirements also prohibit the rehabilitation of non-conforming pre-existing commercial uses, even for the same use. There have been instances in which a new tenant wants to occupy a building for the same use as a previous tenant, which may have gone out of business a number of years ago. Because the use was approved with fewer spaces than currently required, the new tenant is unable to get approvals for the same use without a variance. This is information that tenants and perspective buyers need to know before purchasing property but cannot find out without submitting an application. The result is that township staff have to spend considerable time assisting property owners, or perspective property owners, with navigating the code.

CONSIDERATIONS FOR NEXT STEPS:

- The township should consider providing a reduction in on-site parking requirements where cross access easements and/or shared parking agreements are in place with adjacent property owners.
- The township should consider reestablishing a business liaison position and develop outreach materials to assist current and potential property and business owners, as well as realtors, in understanding the requirements of the zoning ordinance as they pertain to new businesses, parking, and signage.

4. ADDITIONAL ISSUES

The following represents the findings from a review of the Annual Report of the Zoning Board Of Adjustments from 2012 to 2016 as well as stakeholder interviews with Township staff.

Outdated or Missing Uses: There are a number of outdated uses listed that can be excluded from the zoning code (e.g. furriers). In addition, there are a number of uses which have come into fashion but are not specifically addressed (e.g. co-working spaces). Updating the list of allowable uses will significantly modernize the zoning code, resulting in zones which more closely reflect their modern intent. (See also, “The Current Application Process for Zoning Permits, and the application itself, is confusing to Residents, and places a large burden on Planning Staff.” below)

Corner Lots: The township has a number of properties that are corner facing. These lots do not have traditional side and rear yards. The Zoning ordinance attempts to define which portion of the lot should be considered side and which rear. This is particularly important when determining where accessory uses can be placed. However, the language is confusing and difficult to administer.

Home Occupation Definition: The definition of home occupation is not clear and difficult to enforce. For example, it is unclear whether a day-trader or professional working out of an office in their home would need a zoning permit. Other issues include how to treat home-based businesses (such as a power washing businesses) that is based in the home but

where a majority of the work is done off-site.

Co-Location of Telecommunication Infrastructure:

There is an opportunity to review whether telecommunications equipment should be permitted in the Multi-Residential (R2O) High Rise zone. A survey of the R2O zoned would likely note at least a few instances where there are telecommunications equipment on the rooftop of these buildings. Any time these property owners want to add something as small as an antenna, it triggers the need for a use d(2) variance for an expansion of a nonconforming use. If it is proposed on an R2O building that does not have any existing telecommunications equipment, then it would need a use d(1) variance. While the township already has minimum bulk standards that need to be met in order to have a by-right application for telecommunications equipment, the township should consider having stringent conditional regulations that would permit telecommunications equipment in the R2O zone by-right.

Definition of Telecommunications: The code does not distinguish new tower structures from rooftop mounted antennas and the like. Currently, the ordinance does not distinguish tower structures from antennas with regard to setback and height requirements. It is likely that when the code was written, many applications were made for new ground-mounted telecommunications towers. Most applications the township receives now are for rooftop-mounted equipment. For example, antennas are generally proposed to be mounted to new or existing equipment shelters and or penthouse elevators. If the regulations were made “reader friendly” adjacent residential property owners may have a better understanding of what is being proposed should an application still require board approval.

Additionally, there have been a number of new federal laws passed with regard to fast-tracking certain types of telecommunications related applications. The Zoning Ordinance should be updated to be consistent with the recent legislation.

Chickens: There have been several requests to permit chickens and other similar livestock in residential zones; however, the zoning code has no provisions regarding this matter and the general code only has provisions regarding goats, sheep, and swine. These

types of livestock are not permitted to be located within 300’ of dwellings, which essentially makes it impossible to keep them on any residential property in the township. It is recommended that the Township Council consider, where appropriate, revisions to the Zoning Ordinance and/or General Code to address this public policy issue, and determine if chickens or similar livestock should be permitted within the township.

Fees: The ZBA noted in 2014 that the escrow fees associated with application and variance requests should be increased, as the current fee schedule is insufficient for both Planning and Zoning Board of Adjustment applications. Additionally, the requirement for paying an application and escrow fee for each individual variance may put an undue burden on residential property owners and keep them from making improvements to their homes that can help improve our existing neighborhoods, particularly in areas where older homes exist that already do not conform to the requirements of the zoning ordinance. The township should consider making a single fee payment for residential property owners regardless of the number of variances being requested.

Hotels: Consideration should be given to amend the conditional use standards as they relate to motel, hotel, and other similar uses in the B2 zone in regard to standard room size. Trends in the hospitality sector are leading to smaller “efficiency” style rooms that are generally smaller than the 350 SF minimum room size as required in the Zoning Ordinance. The minimum standard room size to permit kitchenettes should also be considered for a revision.

Accessory Structures: There has been a noticeable uptick in zoning permit applications for uses such as back-up generators, non-enclosed storage areas, and koi ponds, yet the Zoning Ordinance does not specifically list regulations for these uses under “Additional Uses & Structures”. It is recommended that standards for these uses be addressed for residential and non-residential properties.

Sheds: The Department of Community Development has received a number of inquiries and zoning permit requests for very large sheds, almost rivaling detached garages in size. It is recommended that a size restriction be placed upon residential storage sheds so as to delineate a shed from a garage.

Landscaping Standards: The table listing the permitted species of plants in Cherry Hill Township appears to be out of date as some of the permitted species are currently not carried by local nurseries. It is recommended that this list be evaluated and updated to reflect not only what new species the township shall permit in conjunction with site plan approvals, but also reflect the species available on the local market. Such a potential revision could address the handling of bamboo as an invasive species. Additionally, new fire safety concerns regarding the location of mulch adjacent to buildings that are not fire safe will require that no landscaping mulch be placed within 10' of the building. The zoning code should be updated to reflect this change.

Fence Height: The Department of Community Development continues to receive complaints about the restrictions on fence heights in secondary front yards for corner properties, which is currently restricted to 3' in height in the front and secondary front yards. The Department should look at alternatives to varying heights so long as it does not present a safety issue regarding access and sight triangles.

Kennels: There is ambiguity regarding the issue of kennels and/or boarding of animals outside of traditional veterinary hospital. Currently, the Zoning Ordinance does not provide specific definitions for this use, and without an interpretation by the Zoning Board of Adjustment, it is unknown as to whether or not a "kennel" would be perceived as a "similar use" to an animal hospital per the specific provisions of the Zoning Ordinance. Clarification should be given as to whether or not the Zoning Ordinance is intended to permit kennels as a similar use or not in zones throughout the Township.

information on this see, "The Current Application Process for Zoning Permits, and the application itself, is confusing to Residents, and places a large burden on Planning Staff." (below).

THE CURRENT APPLICATION PROCESS FOR ZONING PERMITS, AND THE APPLICATION ITSELF, IS CONFUSING TO RESIDENTS, AND PLACES A LARGE BURDEN ON PLANNING STAFF.

The zoning application is presented as a one-size fits all application. This means the same application must be filled out by sophisticated commercial center developers and residents who want to add a deck in their back yard. Often, property owners who are inexperienced with the development review process do not know how to fill out these forms properly. They do not know what information is relevant to their specific application. This often results in extraneous or insufficient information being provided to the reviewer. Township officials report spending considerable time assisting homeowners and small business owners with this process. This detracts from the amount of time they could be spending on other township duties and lengthens the time it takes to complete the review process.

5. ADMINISTRATIVE

THE CURRENT DEFINITIONS ARTICLE OF THE ZONING REGULATIONS (ARTICLE II) LACKS DEFINITIONS OF TERMS USED THROUGHOUT THE ORDINANCE.

Stakeholders and township officials have noted that the definition section of the code is often does not include key terms. One of the most commonly cited problems is the definition of a particular use category. For more



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IV. TRENDS AND CONSIDERATIONS

This section addresses national, regional, and local trends and considerations which are shaping land use patterns.

A discussion of the existing conditions found in Cherry Hill cannot be complete without addressing the national, regional, and local trends and considerations which have the potential to impact Cherry Hill Township now and in the future.

Major trends that may directly impact land use decisions moving forward include:

- The Future of Retail
- Transportation Costs
- The Philadelphia Renaissance
- Camden Rising
- NJ Tax Rates

1. THE FUTURE OF RETAIL

For years, popular logic suggested that the key to keeping property tax rates down is to discourage residential development – particularly housing likely to attract families with children that place a tax “burden” on the municipality – while courting large non-residential projects like office parks, shopping malls, or hotels. This practice is commonly referred to as the “ratable chase” – where towns chase after high-value taxable, or “ratable,” properties.¹

Cherry Hill has had considerable success in attracting non-residential development to offset the need to raise taxes on Cherry Hill residents. In that sense, Cherry Hill has been winning the ratable race.

IMPACT OF RETAIL ON THE COMMUNITY

However, the concentration and continued growth of retail stores within the township is a double-edged sword. **Although residents appreciate the convenience and retail options provided within the township, traffic congestion has worsened.**

Along major corridors such as Marlton Pike (Route 70) and Kaighns Avenue (Route 38), **residents of Cherry Hill express concern that commercial development is slowly encroaching on established residential neighborhoods and lowering property values.**

¹ “Chasing Their Tails: Municipal Ratables Chase Doesn’t Necessarily Pay”, NJ Future, July 2010

LONG-TERM RATABLES CHASE

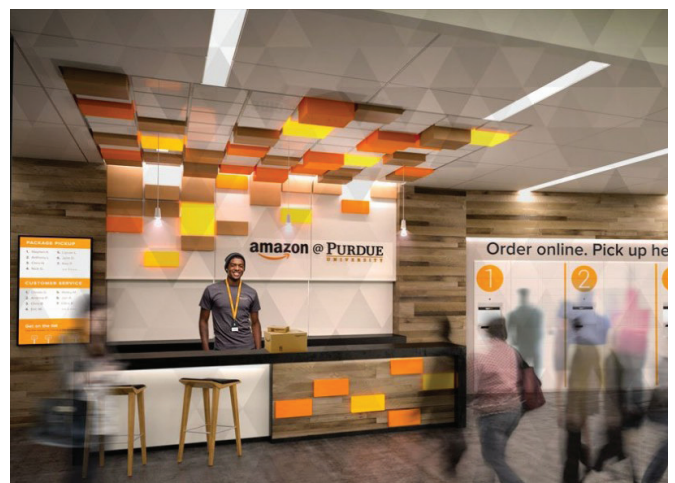
Beyond these localized concerns, **one of the most pertinent considerations for land use in Cherry Hill is the future of brick-and-mortar retail itself.** Although economists do not predict the total replacement of brick-and-mortar retail by online sales, **the physical side of the retail market is shifting to adapt to a growing percentage of online sales and online research prior to purchase.**

News of major anchor stores closing shops and the struggle of shopping malls to remain viable in an online shopping environment are easy to find. For example, in January of 2017, Macy’s announced that it will close 68 stores across the US and an additional 30 stores over the next few years. According to Business Insider, **“Nearly every major department store, including Macy’s, Kohl’s, Walmart, and Sears, have collectively closed hundreds of stores over the last couple years to try and stem losses from unprofitable stores and the rise of ecommerce”.**²

This trend is likely to continue into the future. As Chilton Capital Management, a Texas based investment advisory company notes in a 2016 Report on Shopping, “Besides the normal ebb and flow of retailers, there will be entire portions of retail real estate that will have to be converted to an alternate use. One of the easiest to see disappearing in large swaths will be the low quality malls, a favorite headline story for many media

² “A giant wave of store closures is about to hit the US”. Business Insider, December 31, 2016

Figure 56. Amazon “Locker” Store



outlets.... It is entirely possible that we will see many of the remaining 496 malls downsized or repurposed in the next 10-20 years.... **More than likely, most of the decline in retail square footage per capita will have to come from power centers or strip centers with the most vulnerability to e-commerce threats.**³

On the other hand, a report issued in August 2017 by the IHL Group entitled “Debunking the Retail Apocalypse” suggests that more stores are opening than closing. The study revealed that chain retailers are opening 4,080 more stores in 2017 than they are closing; chains are opening a net 14,239 stores while closing 10,123 stores. The largest gains are in mass-merchandisers - including off-price and value chains, followed by convenience stores, and grocery retailers. The study also found that just 16 chains account for 48.5% of the total number of stores closing, and that five of the 16 represent 28.1% of the total closings. The bulk of retailers that are growing tend to have small and intermediate store spaces, while an important segment of the declining group - department stores - specifically Sears, Kmart, and JC Penney, tend to occupy large-format stores. The result is, while there’s likely a net gain in retail square-footage, it is occurring in more numerous smaller stores, frequently on pad sites, while the stores that are closing are much larger and therefore more noticeable, often in malls.

However, **the impact is not likely to be evenly distributed.** Class A malls, like the Cherry Hill Mall, have been able to attract premier tenants and have performed well from both a fundamentals and valuation perspective. According to an analysis by Green Street Advisors, Class A malls represent 72% of total mall value despite making up only about 1/4 of all malls. This suggests that there may be stronger bifurcation in the market: with premier shopping centers providing a premium shopping experience while lower end shopping centers struggle to compete with online retailers. **As lower end shopping centers fail to attract**

Figure 57. Closed Macy’s in Voorhees Town Center



Figure 58. Lumberton Shopping Center for Sale




retail, there will be more pressure to convert land into a higher and better use, as opposed to struggling retail.

RETAILERS RESPONSES

Retailers have responded by utilizing more “flagship stores,” as the experiential quality of shopping replaces the necessity of visiting a store. Furthermore, it is expected that loyalty programs and in-store events will increase in popularity as shopping in a store becomes more about social interaction.

Stores like IKEA and online retailers such as Amazon are also developing brick-and-mortar stores to serve a purpose closer to fulfillment than to traditional shopping. Through this model, consumers are able to shop online, and pick-up their orders in store. These trends in retail are expected to result in larger, more impactful brick-and-mortar stores, and fewer of them. Bonobos, an online retailer of men’s clothing, has developed

³ “Class A Malls Standing Tall”, Chilton Capital Management, July 2016



a model where customers try on items in the store but get shipped their purchase from the online store. This allows them to occupy smaller footprints while maintaining a strong online presence.

CONCLUSIONS

Cherry Hill should expect that the trend of retailers evolving their brick-and-mortar models will continue. This may impact the township's ability to use commercial property taxes to offset setting residential taxes. Moreover, the township will likely see an increased demand for redevelopment as property owners face the need to repurpose or replace their very large format retail stores. The township will have to define what struggling shopping centers should become when retail is no longer viable. Planning for these changes will have to continue while the township also works to protect adjacent residential neighborhoods and promote other goals and objectives identified in the Master Plan. Similarly, the township will continue to face the issue of expanding smaller format retailing—in strip centers, in repositioned malls, and, especially, on pad sites along high traffic corridors.

2. TRANSPORTATION COSTS

The Housing and Transportation (H+T®) Affordability Index is a service that provides a comprehensive review of housing as well as the cost of transportation at the neighborhood level.

According to their index, Cherry Hill households spend an average (median) of \$12,900 on transportation each year, compared to \$9,500 nationally. Additionally, residents drive more than 20,500 miles each year, which is consistent with the rest of the nation.

The average Cherry Hill household spends \$4,455 on gas. If gas were one-dollar more expensive than it is today (as was the case through much of 2010 through 2014), the average Cherry Hill household would see an increase of \$1,780 in annual transportation costs, approximately \$150 a month. This would constitute 2.5% of the median household income in Cherry Hill. Such a spike would decrease spending power of households (including those in surrounding community). It might also impact Cherry Hill's position as a regional retail destination, as the cost to travel from far distances becomes less attractive for shoppers. Such

a spike in transportation costs would disproportionately affect low-and moderate-income residents, the elderly on fixed incomes, and those households with already high transportation costs.

3. THE PHILADELPHIA RENAISSANCE

Catalytic development and redevelopment is underway in Philadelphia at a scale not seen for decades. High end retail, commercial, and residential development is being planned and completed at an astonishing rate. In fact, there are currently 32 high-rises under construction or undergoing renovations throughout the City. In West Philadelphia, growth is being spurred by institutions such as Penn, Drexel, the Children's Hospital of Pennsylvania (CHOP), and the Hospital of the University of Pennsylvania (HUP).

CENTER CITY

Center City, and the areas directly surrounding, have seen a considerable increase in residents; **since 2000, the population of Center City has grown 16 percent, spurred primarily by residential development aimed at empty nesters, retirees, and well-off millennials who are looking to be a part of the growing excitement in Philadelphia**, with its walkability to countless restaurants, entertainment venues, and job hubs. New or reinvigorated apartment buildings and townhomes built with such suburban-style amenities as backyard space and garages are attracting residents from Philadelphia's suburbs to Center City and its surrounding neighborhoods. The Navy Yard, a massive development project in South Philly, is continuing to see success and currently plans for, at completion, 13.5 million square feet of occupied space, 300 businesses, 2 or more hotels, 1,000 or more residential units and 30 new or renovated buildings.

OPEN SPACE

Structures are not the only pieces of the urban fabric to be redeveloped - open space development is also booming. The revitalization of the Reading Viaduct and the ambitious open spaces outlined within the Delaware River Master Plan are two prime examples of the effort being made to increase the quantity and quality of open spaces in Philadelphia, providing yet another suburban-style amenity to the urban core.

SPOTLIGHT: 30TH STREET STATION DISTRICT PLAN: A MAJOR OPPORTUNITY FOR CHERRY HILL?

The Philadelphia 30th Street Station District Plan is a collaborative two-year joint planning effort to produce a single, integrated long-term vision for growth and development in the area surrounding 30th Street Station along the western bank of the Schuylkill River.

The location of development at a regional mass transportation hub provides a significant probable future for the Cherry Hill New Jersey Transit Station (CRH), which directly connects to 30th Street Station via Amtrak (see Map 4). Should the 30th Street Station district become an employment hub, the attractiveness of reaching the new district via alternative means of transportation could make The Cherry Hill New Jersey Transit Station the premiere transit station for Southern New Jerseyans traveling into Philadelphia.

The appeal of the Transit Station is further magnified by the probability that motor vehicle transportation costs will continue to rise, along with traffic congestion as the region continues to grow. The average American family now spends 50% of its income on housing and transportation costs, and oil prices will likely continue to prove volatile. Furthermore, a lack of reliable federal, state, or county funding sources will continue to exacerbate traffic congestion and deteriorating road infrastructure. It is crucial to understand what modes of transportation will be the most cost-effective to meet the township's transportation needs into the future. The township will need to focus on providing transit options, to not only accommodate more travelers, but to foster economic vitality for local businesses, which rely on easy consumer access.



30TH STREET STATION

The development project of most importance to Cherry Hill is the Philadelphia 30th Street Station District Plan, a collaboration between Amtrak, Brandywine Realty Trust, Drexel University, Penn-DOT and SEPTA. The plan proposes numerous projects and improvements to the areas directly surrounding 30th Street Station and encourages spill-over development in the district as a whole. The planned development will potentially comprise forty new acres of open space, 18 million square feet of new development, and an entirely new mixed-use neighborhood.

For more information on how the 30th Street Station Project is likely to affect Cherry Hill, read “Spotlight: 30th Street Station District Plan: A major Opportunity for Cherry Hill?”

IMPACT

The impact on Cherry Hill of a strong Philadelphia is difficult to predict. Whether post-war white residents fleeing the turmoil of mid-century Philadelphia or businesses escaping the regressive tax structure, Cherry Hill owes many of its strengths to people moving out of Philadelphia in order to find better opportunity. However, Cherry Hill’s easy access to Philadelphia and its improving amenities may still be attractive to those seeking a suburban lifestyle. Regardless, in planning for the future, the township must closely monitor developments in Philadelphia and work diligently to understand its relationship to a rapidly changing City.

4. CAMDEN RISING

For the State of New Jersey, the focus on future growth is shifting away from the suburbs and into urban centers, particularly priority growth investment areas as identified in the State Strategic Plan (Figure 59). These areas are considered by the State of New Jersey to be capable of achieving significant development and redevelopment, and the State is backing these areas with never-before seen levels of

Figure 59. NJ State Development and Redevelopment Policy Map

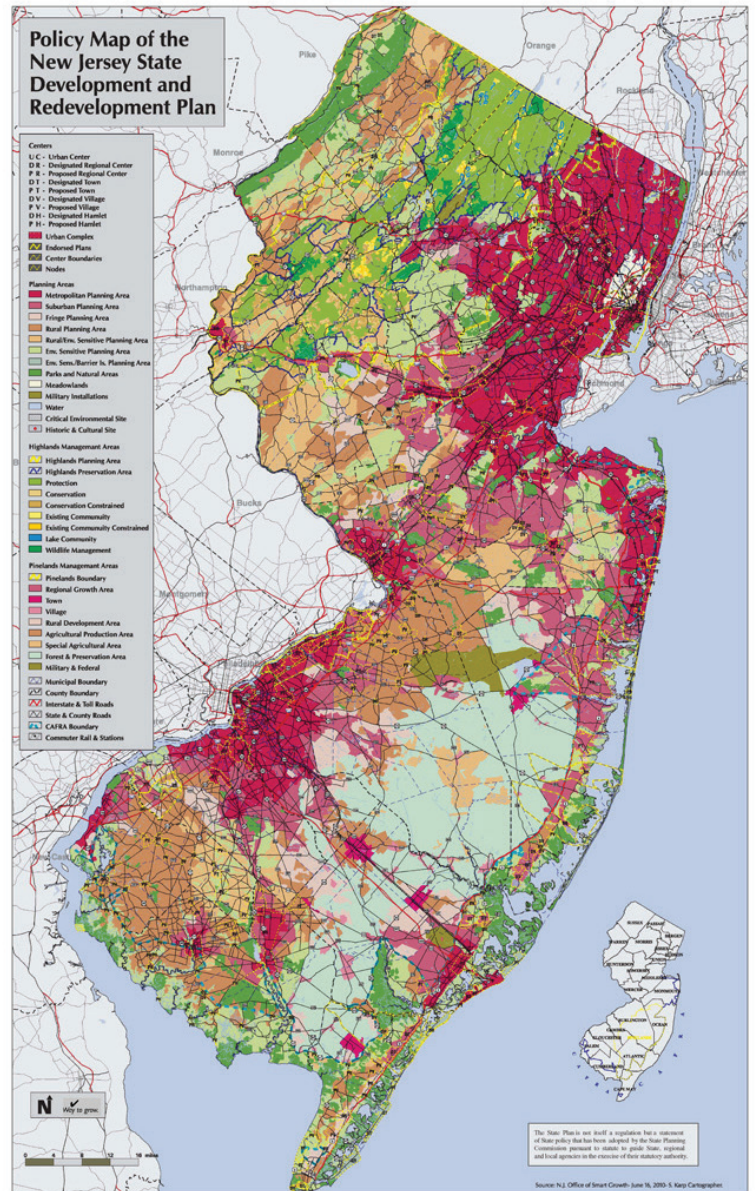



Figure 60. Camden Waterfront Development rendering





economic investment. The Economic Opportunity Act of 2013 has proven to be a massive facilitator in bringing private investment into the City of Camden, the closest major city to Cherry Hill. Through the Economic Opportunity Act, the Economic Development Authority (EDA) was granted the ability to provide hundreds of millions of dollars' worth of tax incentives to businesses who chose to relocate to the city. For example, Holtec International, an energy design and manufacturing firm, was granted \$260 million in tax credits. Spurred by the multiple companies relocating to the City, and the Camden Rising Movement, Liberty Property Trust has invested \$700 million to build a mixed-use development on the Camden Waterfront that will include office space, retail offerings, a hotel, and around 300 residential units. (Figure 6o)

One of the largest critiques of the tax incentive program is that, rather than attracting new economic development, jobs are simply being “poached” from other locations in New Jersey. For Cherry Hill, the rise of private investment in the City of Camden should be seen as both a challenge and an opportunity. After receiving \$118 million in tax credits, Subaru International left Cherry Hill for the City of Camden. Subaru had been publicly searching for a new facility to relocate to for years, citing a lack of space and outdated facilities in Cherry Hill. Similar concerns arise for many office buildings in Cherry Hill, which are approaching decades in age, and no longer meet the criteria for Class A Office space. From a land use perspective, the Township of Cherry Hill must be careful to balance the redevelopment of aging commercial infrastructure while outside economic forces are pulling corporate jobs to elsewhere in Camden County and into Philadelphia.

Conversely, the housing stock in Cherry Hill may prove appealing to those whose jobs are relocating to Camden City, yet desire to settle in a community with established neighborhoods, civic assets, convenient commercial and retail opportunities, and excellent schools. If this proves to be the case, Cherry Hill's Woodcrest PATCO Station, connected to two stations within the City of Camden by high-speed rail, may prove a tremendous asset to the township. Transit-oriented development surrounding the station should be highly considered in this instance, and would support the DVRPC's goal for smart growth within Cherry Hill Township.

5. RISE OF THE MILLENNIAL

There has been extensive documentation of the evolution in life-style for the Millennial generation. These changes to some extent underlie the Philadelphia Renaissance noted above, but they also have implications for suburban communities such as Cherry Hill. The millennial life-style is characterized by:


- smaller households;
- a higher desire for rental housing rather than homeownership;
- flexibility in employment arrangements including freelance employment and even occasional participation in co-working spaces;
- retail, exercise, and community facility environments that provide easy access to social networks; and
- life-style support through a variety of service-oriented businesses (spas; animal services; etc.).

For Cherry Hill to regenerate its middle class, it must provide an attractive environment for millennials including attractive residential, employment, and social/support land uses.

6. EDS & MEDS

The growth in the education and medical services industries (Eds and Meds) has been a strong dynamic of the evolution of the national and state economy for the past 15 years. These trends have been slowing for three or four years and we do not anticipate future employment growth at the levels seen previously. However, the medical service sector is characterized by almost continuous evolution in the technology, systems, and facilities providing state-of-the-art services. Cherry Hill has benefitted in the past several years from health care providers making these reinvestments; the Township needs to remain actively engaged with this sector to encourage continued modernization and investment so that Cherry Hill retains its share of employment in this sector.

With regard to educational services (especially post-secondary services), Cherry Hill did not benefit from employment expansion in this sector in the past decade. These facilities are opportunities as



economic activities unto themselves; but perhaps more importantly, they provide a supportive environment for attracting both workforce and other growing employers. Cherry Hill should seek some growth—in effect, on a catch-up basis—to benefit from the increasing importance of this sector. The recent affiliation of Jefferson Health with Kennedy Health System, coupled with the merger of Jefferson with Philadelphia University may provide a route to such Eds growth in Cherry Hill.

7. DRIVERLESS TRANSPORTATION

The arrival of driverless transportation technologies—certainly expected within the next decade—can significantly benefit the attractiveness of suburban communities as employment nodes. To this point in the post-World War II era, employment locations have either had dense mass transit access or they have been exclusively dependent on workers commuting by car. Cherry Hill currently falls heavily in the second category.

As technically skilled younger workers have chosen to live in downtowns and other dense urban environments, auto-dependent suburban employers have been negatively impacted—some to the point of relocating to downtowns. The only perceived solution for older suburban communities has been to seek massive transportation infrastructure investment in fixed rail services. The high costs of these investments have generally precluded or delayed a positive response from federal, state, and regional sources.

Driverless transportation technology, however, promises to offer a third path—coupling driverless vehicles with existing transit hubs to provide inexpensive service for the last three to five miles. Future systems mating driverless vehicles with expanded frequency of service along existing rail lines can effectively reposition Cherry Hill to capture businesses benefitting both from the Cherry Hill location and from access to a technical workforce arriving by mass transit from Center City and other locations.



V. CONCLUSIONS

The following section provides broad conclusions for land use, sustainability, and sense of place, as concluded from the analyses found in the prior chapters.



1. CONCLUSIONS

The historic patterns, future trends and development considerations, in combination with the demographic shifts mentioned within this examination, should be influential in considering the future land use for Cherry Hill within the 2016 Master Plan update.

LAND USE

The township grew under the principles by which the ideal post-war suburb was defined: stark separation of land uses; reliance on, and deferment to, the automobile for all of life's needs; and low-density, horizontal or sprawling development. The township also grew rapidly and much of the built environment reflects the specific needs and desires of the population at that time. As a result, the township will face a number of challenges as it works to maintain its status as a premier suburban community.

As the second highest land use, after residential, commercial development and redevelopment should be handled with the greatest amount of care. The continued strength of commercial, office, and industrial uses will be key for bolstering the tax base, providing shopping opportunities and increasing local employment. However, the township will have to be careful to ensure that future redevelopment can meet the needs of citizens, be respectful of existing neighborhoods, and sustainable (particularly in how development utilizes transportation infrastructure).

As infrastructure maintenance costs continue to strain municipal budgets nationally, Cherry Hill should also consider how transportation systems of all forms will greatly impact how the township is accessed, and the ease with which residents and job-holders are able to travel within, and outside of, its borders. Cherry Hill's access to Philadelphia and Camden is unmatched in the region, but transportation to and from these places will continue to be crux of that success.

Furthermore, the township must reconcile the shifting demographics within its borders. Efforts should be made to correct the mismatch between housing options and family size, and to provide housing options for their aging and vulnerable population. The township must also address the growing need for physical improvements within a school district with a shrinking school-aged population. The attraction of Cherry Hill


Township as a premiere public school system with a strong housing stock continues to be true today, but as residents age in place, and new families and childless adults choose where in the region to locate, Cherry Hill must determine the wisest path for attracting new residents to the area and supporting those who are choosing to stay. Combined with the growing popularity of Philadelphia, and the ever-increasing property tax burden in New Jersey, Cherry Hill must also position itself to be competitive in offering housing for a variety of family structures and income levels.

SUSTAINABILITY

The township and its residents have recognized the importance of ensuring that Cherry Hill plays its role in maintaining and preserving the environment. In 2016, the City published "Roadmap to Our Future" which created a series of action items for creating a more sustainable Cherry Hill. The Plan argues that, "municipalities such as Cherry Hill Township are in a unique position to partner with local residents and business owners regarding sustainable development by incorporating sustainable practices into municipal activities and using the relationship to communicate ways to practice sustainability at home and in business." (Roadmap to Our Future, 5) The Sustainability Plan provides a roadmap for the township to practice sustainability in its own actions, guide property owners toward energy-efficient "green" building and site design, and help residents, workers and visitors incorporate green practices into their everyday.

Increasingly, communities such as Cherry Hill are also paying attention to "smart growth" principles which advocate for creating places with a mix of building types and uses, diverse housing and transportation options, development within existing neighborhoods, and community engagement. Fueled by New Urbanist design principles, this new paradigm was one of the driving forces behind the design for the redeveloped Garden State Race Track. Originally conceived to be the new "town center" of Cherry Hill, the area currently represents a stronger mix of land uses within a single development and implementation of a more walkable urban design. Likewise, smart growth principals underlined the development of the State Strategic Plan.

As Cherry Hill defines its role in the region moving forward, it is conceivable that the township may



take a strong role in the creation of model, modern sustainable suburban communities. Cherry Hill, once the *premiere* shopping destination in the region, could also become the *premiere sustainable* suburban community.

LACK OF PLACE

Throughout its development, little effort was made in defining a “center” of the township beyond the de-facto center at the Cherry Hill Mall. With the few early crossroads commercial nodes demolished in favor of wider roads and parking lots, **Cherry Hill residents today have no traditional “downtown” or “town center” to point to.**

The new Garden State Park development, constructed on the site of the former Garden State Park racetrack and promoted as the new “town center” of Cherry Hill, promised to be that new town center. However, the project has been criticized for its disconnection to nearby transit lines and lack of mixed uses and walkability. There are no spaces for large community events -summer concerts, parades, or other civic events - and does not currently function as the township’s center.



CHERRY HILL

existing conditions report

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EXISTING CONDITIONS REPORT

TOWNSHIP OF CHERRY HILL, NJ

