

## Center City/Market East Sites

All three Center City sites analyzed by the Task Force lie east of Broad Street, straddling Market Street between 8<sup>th</sup> and 12<sup>th</sup> Streets. The following are in-depth descriptions of the site suitability, transportation, and economic impact advantages and challenges held in common across these three Market East sites:

### 8th and Market (2.8 acres)

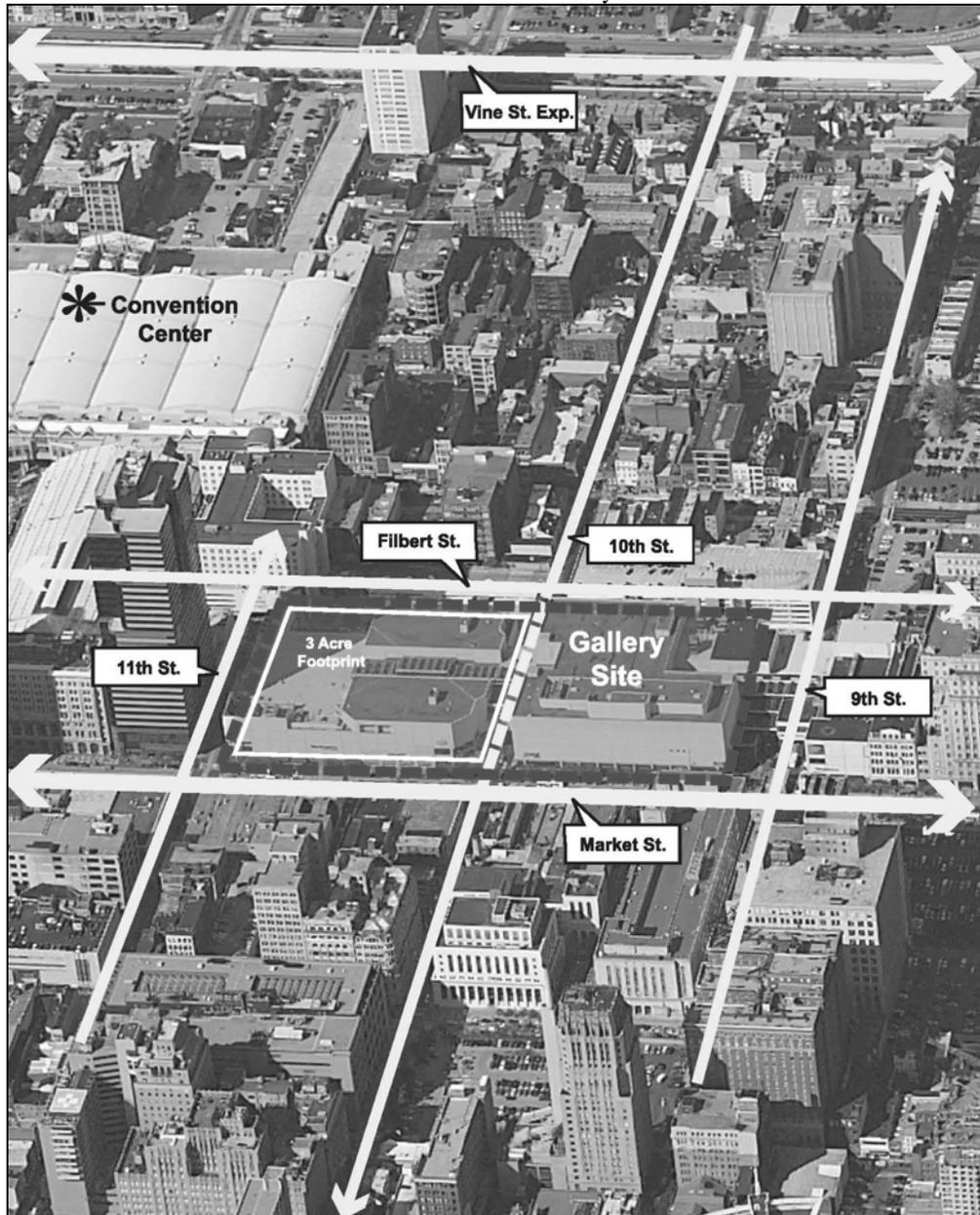
IMAGE 2.28: 8<sup>th</sup> and Market Site



Source: Philadelphia City Planning Commission

### The Gallery (7.2 acres)

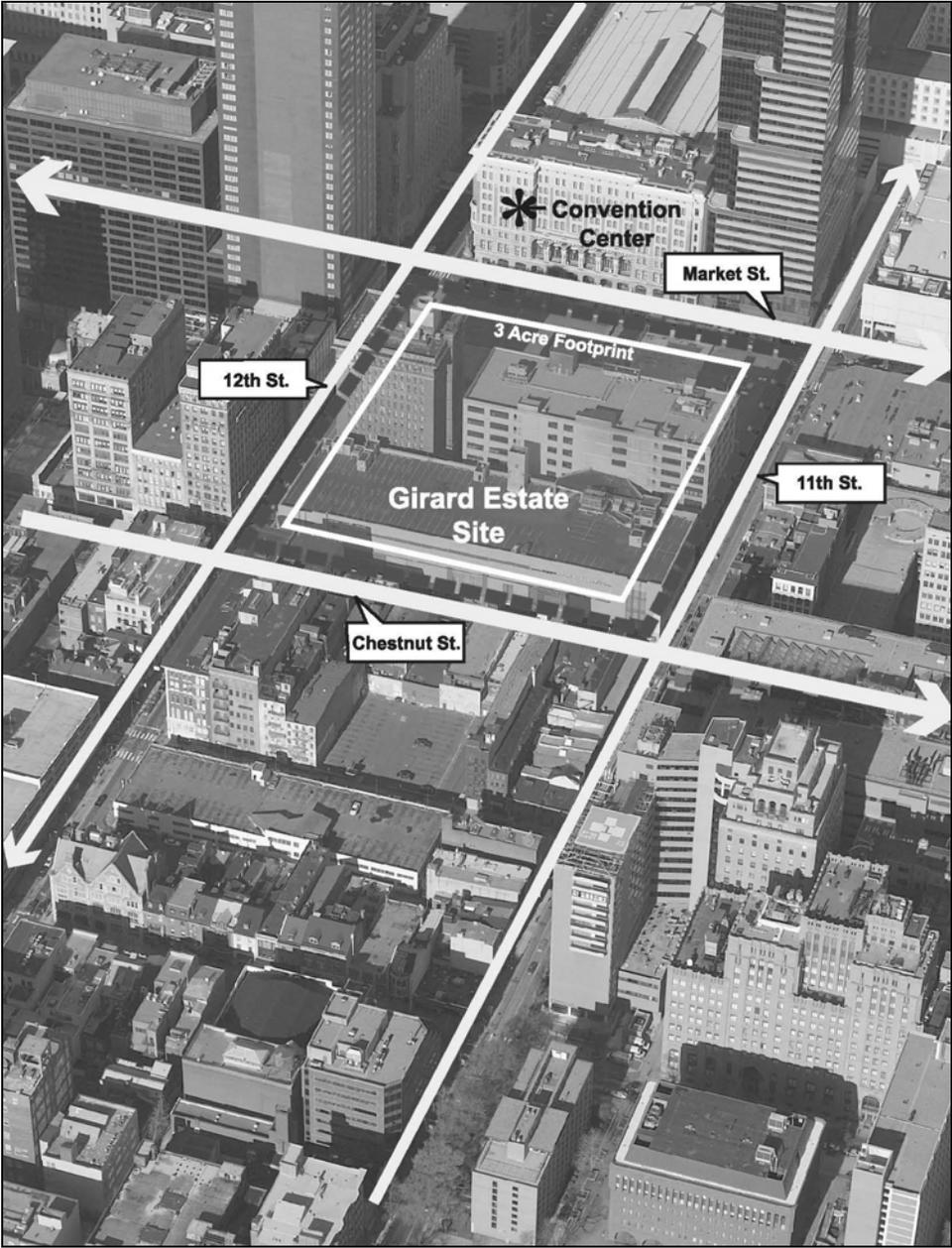
IMAGE 2.29: The Gallery Site



Source: Philadelphia City Planning Commission

Girard Estate (3.7 acres)

IMAGE 2.30: Girard Estate Site



Source: Philadelphia City Planning Commission

## Site Suitability

### *Advantages*

- In its 1988 plan for Center City and subsequent 1990 Market East urban design study, the Planning Commission has recommended accommodating new growth and development of Market East without compromising its historic and physical integrity. The Philadelphia Convention and Visitors Bureau and the Center City District have continued to work toward this same goal, with the understanding that “proposed gaming facilities, if well designed and managed, could add new evening destinations filling in gaps in the pedestrian experience.”<sup>2</sup> Each of the three Market East sites could be compatible with this planning goal of extending visitor-oriented, pedestrian-enhancing development along Market East while providing a valuable asset to the area.
- The Market East sites are compatible with surrounding lands uses, which are primarily retail and office space.
- Nearby restaurants and the Convention Center offer a degree of compatibility and synergy. The relationship with the Convention Center should allow significant capture rates from that market segment.
- The Market East sites are located within blocks of major tourist attractions including the historic district (Independence Hall, Liberty Bell, Constitution Center), City Hall, Reading Terminal Market, and Chinatown.
- The sites are also situated between hotel concentrations around City Hall and the Convention Center and in the Historic District. This proximity should enhance market capture from overnight visitors to the city.

### *Challenges*

- The sites are neither visible from an interstate, nor will they be easy for non-residents unfamiliar with Center City to find as they drive into Philadelphia.
- Each of the sites is considered small for casino development and would probably require multi-level development at significantly increased costs if the appropriate amenities are to be provided. This would be an atypical development, which casino operators tend to avoid for reasons of construction cost, operational difficulties, and customer preference.
- Due to the Center City location, costs are likely to be comparatively high in terms of land acquisition, mitigation actions, and construction.

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<sup>2</sup> State of Center City 2005. Prepared by Center City District & Central Philadelphia Development Corporation.

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- The limited site size could make it difficult to get a 3,000-slot machine facility up and running in one year and will inhibit any future expansion. It also will make phased development more challenging.
- There are no compelling negative aesthetics associated with the sites.
- A survey conducted by the Task Force indicates that, if given the choice between visiting a Center City or a waterfront casino location, Philadelphia regional residents overwhelmingly prefer a waterfront gaming site by a ratio of 66 to 22 percent. This corresponds with surveys of gamers elsewhere that indicate a preference for gaming locations not in the urban core where there is often a negative perception of crime and congestion.
- Sites are close to several residential communities.

## **Transportation**

### ***Advantages***

- I-676 connects I-76 to I-95, providing nearby access to the region's highway network. While there is no direct visibility to I-676, it is only four blocks from each of the sites. I-676 provides good highway access to the east towards New Jersey, while I-76 provides access to the west. I-95 provides access to the northeast and southwest.
- Public transit access is excellent from communities within the city, as well as from New Jersey and the Pennsylvania suburbs, with the sites serviced by SEPTA regional rail lines at Market East Station, the Market-Frankford subway at several stops along Market, and more than 20 bus lines. The Greyhound/Trailways terminal is nearby at 10<sup>th</sup> & Filbert and the sites are also serviced by the 8<sup>th</sup> & Market PATCO station providing rail access to South Jersey.
- Pedestrian access is good, with estimated lunchtime pedestrian counts on Market Street of 2,100, and approximately 1,000 on Chestnut in the general vicinity of the sites.

### ***Challenges***

- While overall highway access is considered good, congestion on I-676 during the rush hour may act as a deterrent to gamers visiting a Market East site.
  - Traffic congestion on local streets during the work week will be an area of major concern likely requiring significant roadway mitigation efforts from interstate off-ramps to the site. It is expected that there will be significant traffic conflicts and that new traffic police resources will be required.
  - The small size of each of the Market East sites will make the provision of sufficient free on-site parking problematical and costly to provide. While there are a large number of
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parking spaces in the general vicinity, these are, for the most part, occupied during the workweek but would be available in the evenings and on weekends. However, it is unclear how this will meet the very important criteria of free covered parking so often cited by gamers as a critical component in their selection of a casino. While the need for parking may be decreased by public transit access, attendance by a relatively high proportion of tourist visitors, and visits from residents already in the area for other purposes who have parked elsewhere, this will likely prove to be a difficult problem to overcome. If parking is to be provided on-site, it will likely have to be done on upper floors above the casino and retail development.

- It will be challenging to design and develop an efficient and sizeable bus loading and unloading facility in conjunction with each of the Market East sites.

## **Economic Impact**

### ***Advantages***

- There are major weekday daytime populations of workers and shoppers in the area not present at most other potential gaming sites
- The sites are within a reasonable walking distance to cultural events along the Avenue of the Arts as well as the numerous restaurants and shops that line Walnut Street.
- There are several local bars and pubs proximate to the sites, and some of the city's primary nightlife districts in Old City and along Delaware Avenue are only a short cab ride away.
- Depending on how they are designed, casinos could enhance redevelopment along Market Street, particularly in terms of retail, restaurants, and other forms of tourist or visitor-dependent businesses. It is important to note, however, that development of The Gallery has not achieved this effect, as the mall's inward facing design and lack of street-level retail has largely failed to stimulate other business activity along Market East.
- The excellent public transit access means that the sites are accessible by a very large regional labor pool.

### ***Challenges***

- The already highly developed nature of the area and its high land values will likely reduce the amount of nearby new development that can be expected as a result of the advent of a gaming venue, although existing businesses would be likely to realize significant benefits.
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## Differences among Center City/Market East Sites

Beyond these common advantages and challenges, remaining major differences among the three Market East sites are limited. These differences center on the size of the site, potential synergy with surrounding land uses and activities, and transit access.

### Size of the Site

Each of the three Market East sites is considered small for casino development and as having limited expansion potential. The 8<sup>th</sup> & Market site is the smallest at only 2.8 acres and would require considerable design innovation to accommodate gaming development. The Girard Estate site is slightly larger at 3.7 acres, which could accommodate a 130,000 square-foot gaming floor; however, it would be impossible to add back-of-house uses and amenities on the same floor. Both the 8<sup>th</sup> & Market and the Girard Estate sites would necessitate multi-level development, and if existing retail remained at The Gallery and Girard Estate sites, it would require gaming development on upper floors. This is not the most desirable development format since operators prefer ground-floor casinos that facilitate pedestrian access.

The Gallery site, even at 7.2 acres straddling two city blocks, is relatively small for a casino. Theoretically, a single-level casino with food and beverage and entertainment space could be developed on one floor if the entire six-acre site were to be used as the building footprint. It is not clear if this is feasible or desirable from a casino operator's standpoint.

### Synergy with Nearby Uses and Activities

The three Market East sites are located close enough to each other that they share the same general characteristics with respect to potential synergies with nearby entertainment, restaurant and retail, tourism, convention center, and hotel uses. However, some important distinctions exist regarding their relative locations to some of these uses.

The 8<sup>th</sup> & Market site is midway between City Hall and Independence Hall and would do the best job among the Center City sites of distributing major nodes of activity along Market Street. Being closer to Broad Street, the Girard Estate site perhaps would not be as effective at extending development along Market Street as the other two Center City sites. The Girard Estate site is closest to the Avenue of the Arts as well as the numerous restaurants and shops that line Walnut Street. All three sites have relatively good relationships to restaurants, but the 8<sup>th</sup> & Market site is closest to the Old City concentration of bars and clubs.

The Girard Estate and Gallery sites are immediately adjacent to the Loews and Hilton hotels and in close proximity to the Philadelphia Marriott and other hotels around the Convention Center. The 8<sup>th</sup> & Market site has no adjacent rooms, is a few blocks further from the Convention Center hotels, and has the Historic District hotel concentration 4-5 blocks to the east. This lack of hotel adjacency at 8<sup>th</sup> & Market could be a significant issue given the limited size of the site, which may make the development of any future hotel component associated with the gaming development difficult and costly.

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The Girard Estate site is directly across Market Street from the Convention Center, which should allow it to maximize market capture for conventioners compared to other Market East sites. While it is closer to City Hall, Broad Street, and new development along 13<sup>th</sup> Street, it is further away from the Historic District's tourist attractions. The Gallery is most proximate to Chinatown, although the other two sites are also very close.

The Gallery's status as an urban retail mall offers a significant opportunity to create synergy with gaming development, assuming it is retained and the mix of retail outlets adjusted to cater more to the tastes of gamers. Gaming could help to transform this long-underperforming property, strengthening the retail offerings and generating revenues for much-needed building and exterior improvements.

### **Transit Access**

Market East is extremely well served by public transit, between the Market East regional rail station, the Market-Frankford subway line, multiple SEPTA and New Jersey Transit bus routes, and PATCO connecting to South Jersey. The Gallery is exceptional in this respect, with SEPTA's Market East Station integrated into the development and the Greyhound/ Trailways bus terminal immediately behind the mall. Public transit access for Girard Estate also is excellent, with the site being serviced by both rail and bus lines. The site is adjacent to the 11<sup>th</sup> Street SEPTA Market-Frankford subway station and Market East station.

## **North-Central Delaware Waterfront Sites**

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There are two North-Central Delaware Waterfront sites: the Fishtown and the Old Incinerator/Festival Pier sites. The following are in-depth descriptions of the site suitability, transportation, and economic impact advantages and challenges held in common across these two North-Central Delaware sites:

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Fishtown (27 acres)

IMAGE 2.31: Fishtown Site



Source: Philadelphia City Planning Commission

### Old Incinerator (11 acres)

IMAGE 2.32: Old Incinerator Site



Source: Philadelphia City Planning Commission

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## Site Suitability

### *Advantages*

- Both sites are compatible with the long-term goal of activating the riverfront. While no formal plans have been identified with the Delaware riverfront south of the Betsy Ross Bridge, each site could provide an “anchor” that has the potential, by the sheer weight of visitation and investment, to reinvigorate and activate the remainder of the riverfront in conjunction with other planned developments.
- Visibility from the interstate is good for both the Fishtown and the Old Incinerator sites, each of which is only a block away from I-95. There is good access to the Benjamin Franklin Bridge, from which the sites are visible.
- Both sites have sufficient land to accommodate initial development and expansion.
- The riverfront location, if developed appropriately, could have interesting and beneficial aesthetics, including the possibility of ferry or water-taxi connections to Penn’s Landing and Camden’s waterfront.
- Utility infrastructure requirements are likely to be minimized due to previous uses, although development of the Old Incinerator site would require relocation of sewer lines.

### *Challenges*

- Aside from the Delaware Avenue nightclubs, there is little potential synergy with existing surrounding land uses.
- There is no immediate proximity to tourist attractions or facilities.
- There is limited proximity to hotels.
- The landside aesthetics of the surrounding areas could pose a challenge. This appearance, however, could change significantly once several planned residential towers are completed.

## Transportation

### *Advantages*

- I-95 provides excellent highway access to the northeast and southwest, to bridges to the north and south into New Jersey, and, via I-76, to the Atlantic City Expressway. On and off ramps are relatively close by, although clear directional signage would be required for
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navigating to a casino site. Planned reconfiguration of the I-95 Girard Avenue on- and off-ramps will significantly improve access, providing a more direct connection to either site.

- Traffic capacity on local streets is excellent, with congestion limited to occasional weekend evenings when Delaware Avenue and Spring Garden Street experience heavy volume due to the clubs.
- There is bus transit access and proximity to the Market-Frankford elevated subway line, providing access for Philadelphia residents seeking casino employment.

### ***Challenges***

- While overall highway access is considered good, congestion on I-676 during the rush hour and at other times is a negative that may act as a disincentive to gamers visiting a North-Central Delaware location, although less so than for Center City sites.
- There is no significant pedestrian access and no nearby SEPTA regional rail lines.

## **Economic Impact**

### ***Advantages***

- Each site could engender development of the riverfront.
- Both sites could help to stimulate redevelopment of Spring Garden and Girard Avenues, in particular Spring Garden for the Old Incinerator site and Girard Avenue for the Fishtown site.
- Each site could provide proximate employment for residents of the Fishtown, Northern Liberties, and surrounding neighborhoods.
- Both sites are a short cab ride away from Old City and the Historic District.
- There may be additional property available in the area for expansion.

### ***Challenges***

- There is no meaningful direct relationship to restaurants, tourist, hotel, or convention venues, although both sites are a relatively short cab ride from Center City.
  - There are no major daytime populations of workers and shoppers in the area.
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## Differences Between North-Central Delaware Waterfront Sites

Beyond these common advantages and challenges, some significant differences exist between the two North-Central Delaware Waterfront sites. Of the two sites, the Old Incinerator site would likely offer greater economic spin-off benefits, be a stronger anchor for riverfront development, and be more closely integrated into the local economy. However, the Fishtown site has greater visibility from the interstate and the Ben Franklin Bridge and would offer greater flexibility in design and opportunities for expansions.

### Site Suitability

The Fishtown site is located close to warehouses and light industrial buildings and is immediately adjacent to the Delaware River. While there is no benefit or synergy with these land uses, there is also no major incompatibility issue either. Some synergy is possible with the Port Richmond Village shopping center on the other side of I-95. The site is proximate to, and visible from, I-95 and from the Betsy Ross and Benjamin Franklin bridges, making it easier to find by non-residents, in particular those coming from New Jersey. At 27 acres, the site is sufficient for a casino development with all the appropriate amenities on a single level. The site is also buffered from nearby residential areas by the highway. The view and psychological connection back to Center City is actually better from the Fishtown site, despite the longer distance.

At approximately 11 acres, the Old Incinerator site is sufficient for a casino development with all the appropriate amenities. Located at the intersection of Delaware Avenue and Spring Garden Street, the site is a short distance away from tourist attractions such as Penn's Landing, Old City, the Historic District and Chinatown and would be easily visible from the Benjamin Franklin Bridge. On the landside of the Old Incinerator site are development sites, warehouses, private businesses, and a gentlemen's club. Other than a synergy with the gentlemen's club, there is no benefit or synergy with these land uses, and there is also no major incompatibility issue either. The Old Incinerator site is publicly owned, potentially allowing the city greater leverage to influence design and to generate an additional revenue stream in the form of lease payments.

The Old Incinerator site may provide a better "anchor" for development than Fishtown as it does not "stretch" the expectation of riverfront development beyond that which may reasonably be expected. It is closer to long-established and successful Center City nodes of activity, reducing the chance that it will become an isolated development and affording it a better opportunity to become an integrated component of riverfront development. The development of major residential towers just to the north along the Delaware River could provide a source of highly proximate patronage while providing entertainment and restaurants for the residents. The site also is relatively removed from the nearby Old Liberties and Old City neighborhoods.

In terms of challenges, the Old Incinerator site currently generates no beneficial synergy other than with Delaware Avenue nightclubs. In addition, development of the site would displace the current Festival Pier concert and event venue. It is two blocks from I-95 and would not be easily visible from the interstate, making it somewhat difficult to find for non-residents. There is no immediate proximity to hotels or the convention center, although both are a short cab ride away. Significant expansion would likely be limited to vertical development or purchase of adjacent

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property.

### **Transportation**

Construction of a parking facility should not be a problem at the Fishtown site, while it would need to be vertically integrated into the more confined Old Incinerator property. There should be little difficulty in designing and operating a bus loading and unloading facility at the Fishtown site, although tour buses may have to be stored off-site. The limited site size of the Old Incinerator site would require off-site bus storage and likely employee parking.

Access from I-95 will be significantly improved with the planned ramp reconfiguration at Girard Avenue, for which the new northbound off-ramp would dump almost directly into the Fishtown site. Currently, on- and off-ramps are several blocks away for both sites and require somewhat circuitous local routes to get between the site and the highway. Visibility and path-finding concerns, in particular for the Old Incinerator site, could be overcome by appropriate signage.

Public transit is stronger at the Old Incinerator compared to the Fishtown site. In Fishtown, public transit access is limited to bus, no regional rail lines run nearby, and the site is more than one-half mile from the nearest Market-Frankford El stop. For the Old Incinerator site, a SEPTA Market-Frankford El station is located at Spring Garden Street and I-95 two blocks away, providing access to the Center City area and connections to SEPTA lines serving the entire city.

### **Economic Impact**

The Fishtown site is at the northern edge of the Delaware Avenue clubs, while the Old Incinerator is more centrally located among existing riverfront nightlife options and close to Northern Liberties. The sites have a poor relationship to restaurants and to hotels, although both are a short cab ride away in the Historic/Old City District. There are no major daytime populations of workers and shoppers in the area of either site, although there is likely to be a significant residential base nearby the Old Incinerator. The Fishtown site could provide proximate employment for residents of the Fishtown and surrounding neighborhoods and benefit small business in the area.

## **Penn's Landing Site**

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The Penn's Landing site is described below. In summary, this site would be closely integrated with the local economy in terms of relationship to restaurants, bars, nightclubs, hotels, and tourist attractions. Pedestrian access would be a challenge. There would be the potential for congestion on local streets. However, the site has good highway access and high visibility and is a well-known location regionally. Perhaps the greatest negative associated with the site is that its use for casino development would limit public access to the riverfront at this key location adjacent to the historic district. This would have serious implications for future plans to open up the riverfront for public activities.

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Penn's Landing (13 acres)

IMAGE 2.33: Penn's Landing Site



Source: Philadelphia City Planning Commission

## Site Suitability

### *Advantages*

- Currently, Penn's Landing is the major existing public access point to the Delaware River. Development of this site would continue the process of riverfront development, and the 13-acre site is likely large enough to accommodate casino development.
- Gaming at the site would be compatible with the restaurants, bars and hotels in the Historic/Old City District and would develop considerable synergy with them. It is immediately adjacent to the Hyatt Regency Hotel and is a short cab ride away from hotels close to the Convention Center and City Hall.
- The site is adjacent to the Independence Seaport Museum, with which it would develop some degree of synergy. It is also adjacent to the RiverLink ferry terminal, which currently operates from 9 AM to 6 PM during April through September and links the site with the Adventure Aquarium, Tweeter Center, Campbell's Field, and other attractions across the river in Camden.
- Being located at Penn's Landing, immediately adjacent to I-95 and Delaware Avenue, and being clearly visible from the Benjamin Franklin Bridge, this site should be relatively easy for non-residents to find.
- The riverfront location, if developed appropriately, could have interesting and beneficial aesthetics.
- The magnitude of the casino investment could provide the resources necessary to help bridge the gap in the pedestrian fabric created by I-95 and Columbus Boulevard.
- The site at approximately nine acres is theoretically sufficient for a casino development with all the appropriate amenities. However, it is likely that the development would be multi-level given the need to provide for internal circulation, parking and other functions. Parking would have to be provided either in an adjacent property or in a multi-level garage vertically integrated into the overall development.
- The site is a short distance away from tourist attractions such as Old City, the Historic District, and Chinatown.

### *Challenges*

- A gaming use at the site could significantly limit public access to the riverfront at this central location, which is widely considered as a valuable asset and key component of riverfront development.
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- I-95 and Delaware Avenue form a major concrete barrier between the casino development and the Historic/Old City District, which provides aesthetic challenges for the design of the site.
- There is no immediate proximity to the Convention Center, although it is a short cab ride away.

## **Transportation**

### ***Advantages***

- I-95 provides excellent highway access to the northeast and southwest, to bridges to the north and south into New Jersey, and, via I-76, to the Atlantic City Expressway. On-and off-ramps are close by.
- A SEPTA Market-Frankford subway line station is located a block and a half away at the intersection of 2<sup>nd</sup> and Market. The site is also served by bus transit.
- The vast majority of traffic will access the site off of I-95 and Columbus Boulevard, potentially preventing major congestion on other local streets.
- Construction of a parking facility would need to be vertically integrated into the development.

### ***Challenges***

- While overall highway access is considered good, congestion on I-676 during the rush hour is a negative that may act as a disincentive to gamers visiting the site, especially from the western suburbs.
- The limited site size will require off-site bus storage and employee parking.
- Local access on Columbus Boulevard and I-95 off-ramps could become congested.
- While pedestrian access across both Delaware Avenue and I-95 is grade separated, this expanse creates a design challenge to provide a pleasant and effective connection to the attractive and appropriately scaled pedestrian environment of the Historic District.

## **Economic Impact**

### ***Advantages***

- The site could engender development of the riverfront.
  - The potential exists for significant synergy with Old City restaurants, bars, and nightlife at this site. It also could help enliven the Historic District, bringing additional business to
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the area and boosting visitation at nearby hotels, in particular the adjacent Hyatt.

- The site provides access to a citywide labor pool via SEPTA access.
- Penn's Landing is publicly owned, thereby allowing the city greater leverage to influence design and potentially to generate an additional revenue stream in the form of lease payments.

### ***Challenges***

- The site is not as advantageously placed relative to public transit to tap into citywide labor pool as a Center City gaming location, but fares slightly better than the Fishtown and Old Incinerator sites.

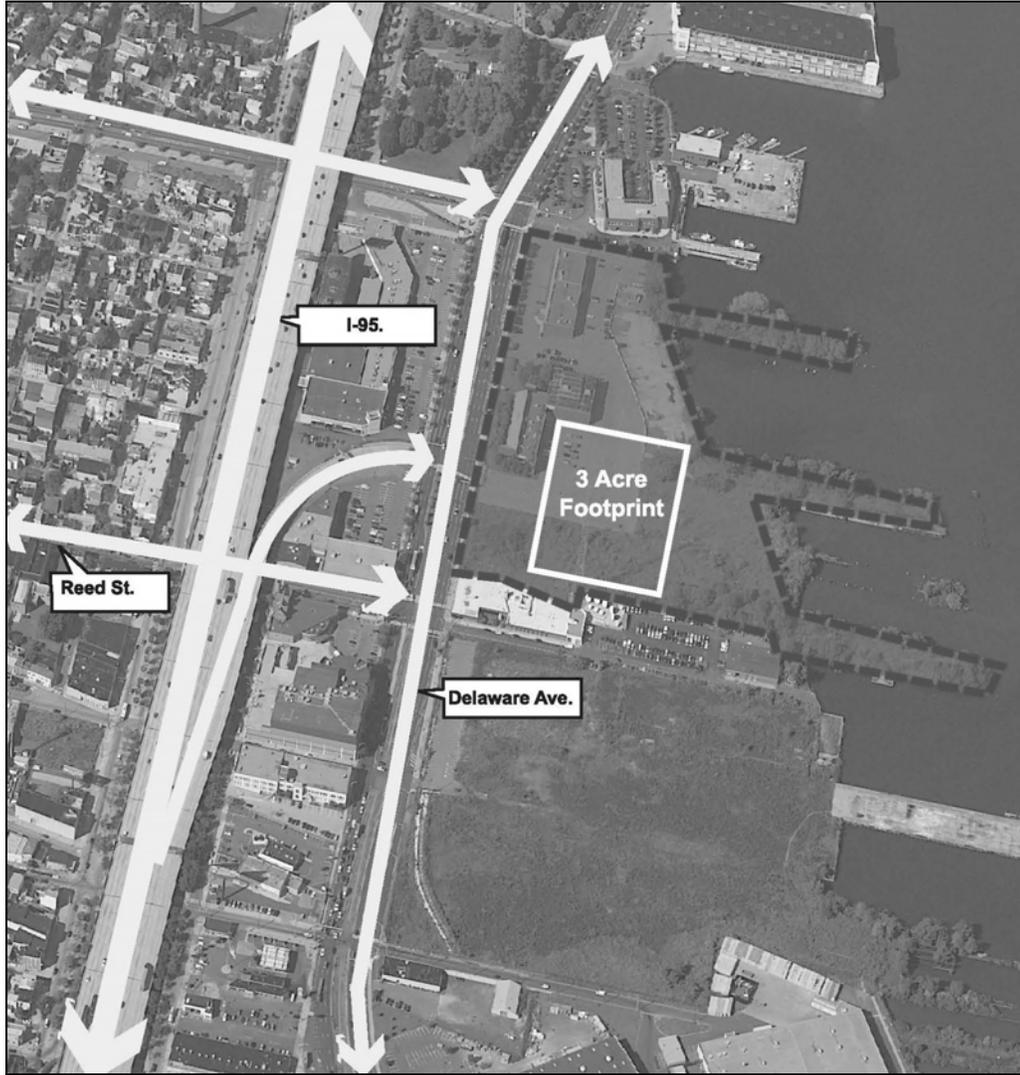
## **South Delaware Waterfront Sites**

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The two South Delaware sites are immediately adjacent and have many of the same characteristics, so most of the same advantages and challenges apply to both sites.

### **Sheetmetal (12 acres)**

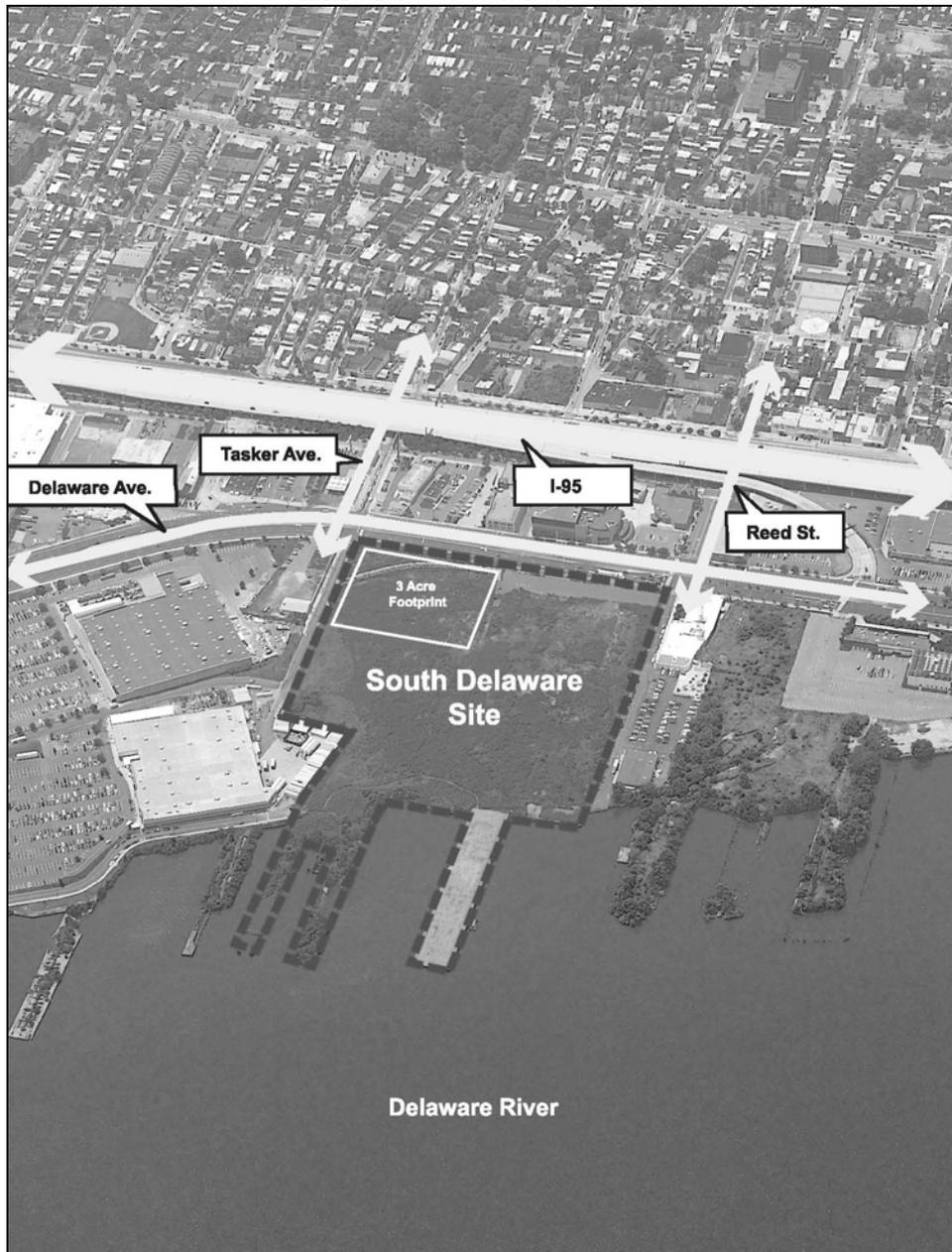
IMAGE 2.34: Sheetmetal Workers Site



Source: Philadelphia City Planning Commission

### South Delaware (16 acres)

IMAGE 2.35: South Delaware Site



Source: Philadelphia City Planning Commission

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## Site Suitability

### *Advantages*

- Both sites are compatible with the long-term goal of activating the riverfront. While no formal plans have been identified with the Delaware riverfront, either site could provide a southern “anchor” that has the potential, by the sheer weight of visitation and investment, to reinvigorate and activate the remainder of the riverfront in conjunction with other planned developments.
- Each site would be compatible with the “big box” retail developments that have occurred along this portion of Columbus Boulevard.
- Both sites have sufficient land to accommodate initial development.
- The riverfront location, if developed appropriately, could have interesting and beneficial aesthetics, including connections by ferry or water-taxi to Penn’s Landing and the Camden waterfront.
- Both sites would be visible from the Benjamin Franklin and Walt Whitman Bridges.
- Infrastructure requirements are likely to be minimized.

### *Challenges*

- Neither site is related directly to any tourist attractions or hotel concentrations, though the Caesar’s site has good views back to Center City.
- There is no immediate proximity to the Convention Center, although it is a short cab ride away.
- The sites may be less familiar to non-residents.
- Current landside aesthetics are less than desirable.

## Transportation

### *Advantages*

- I-95 provides excellent highway access to the northeast and southwest, to bridges to the north and south into New Jersey, and, via I-76, to the Atlantic City Expressway. On and off ramps are close by.
  - There is transit access to the sites in the form of bus service.
  - The vast majority of traffic will access the sites off of I-95 and Columbus Boulevard,
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thereby potentially limiting the level of congestion on local streets.

### ***Challenges***

- While overall highway access is considered good, congestion on I-676 during the rush hour is a negative that may act as a disincentive to gamers, especially those visiting from the western suburbs. Current I-95 ramp configuration leads to congestion heading up to on-ramps and could create off-ramp back-ups with the addition of a casino.
- In the absence of traffic police, local street congestion may be a problem given the proliferation of “big box” retail along Delaware Avenue and the traffic demands that development has already placed on the street system. In particular, congestion is possible on weekends and evenings when the peak periods of demand for “big box retail” and the casino are likely to overlap. This could require significant mitigation on Columbus Boulevard and other local streets.
- Aside from bus service, there is no existing public transit access and any new light rail investment along Delaware Avenue is at least seven years away.
- There is little or no pedestrian access to the sites.
- Limited site size will require off-site bus storage and employee parking.

### **Economic Impact**

#### ***Advantages***

- The sites could engender development of the riverfront and could benefit local businesses, in particular nearby strip malls along Columbus Boulevard.
- The sites could accommodate a clustered location for both Philadelphia slots parlors, but such an approach would require significant traffic mitigation.
- Local communities could benefit from the employment the development would bring to the area.

#### ***Challenges***

- There is little in the way of synergistic economic development at either site, with the exception of “big box” retail.
  - There is no meaningful direct relationship to entertainment, restaurant, nightclub/bar, or hotel concentrations. However, both sites are a relatively short cab ride from Center City and there are good views back to the Center City skyline from the Caesar’s site.
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- Not as advantageously placed relative to public transit to tap into city-wide labor pool as other locations.

Since the two South Delaware sites are adjacent, the only significant differences between them pertain to their respective property specifications. At approximately 16 acres, the South Delaware Caesar's site is sufficient for a casino development with all the appropriate amenities, including parking, on-site bus loading and unloading and potentially bus storage. It is likely to contain enough land to accommodate future expansion.

The adjacent Sheetmetal Workers site is more constrained at 12 acres. This makes it theoretically sufficient for a casino development with all the appropriate amenities. However, it is likely that the development would be multi-level given the need to provide for internal circulation, parking and other functions. Parking would have to be provided either in an adjacent property or in a multi-level garage vertically integrated into the overall development. There should be little difficulty in designing and operating a bus loading and unloading facility, but tour buses may have to be stored off-site. Also, construction of a parking facility would need to be vertically integrated into the development and expansion could be limited.

Use of existing riparian rights, however, could add several acres of development potential to each site.

## **Navy Yard Site**

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The Navy Yard site's greatest benefit is from land availability in terms of the design flexibility it affords and the ability to expand development in a meaningful way. A casino development might help to accelerate development of the Navy Yard as a whole, or it could retard investment. While there would be some synergy with the planned land uses at the Navy Yard, the site would be for the most part isolated from the wider local economy with no relationship to local tourist attractions, hotels, bars, nightclubs and restaurants. It is, however, the only site that has a close relationship to the City's sporting venues. I-95 passes nearby and intersects with I-76, providing excellent highway access, which would largely avoid interstate congestion present at other sites closer to Center City. There is some concern that Broad Street, the only existing access point to the potential site, would face additional congestion on top of current event traffic and that conflicts would arise with other land uses planned for the Navy Yard. There is however the possibility that these could be mitigated. While non-residents may have a problem finding the site, regional residents are likely to be familiar with the area given the presence of the major sports stadiums nearby.

This site, due to its quasi-public ownership, could provide the City with leverage over design issues and an additional revenue stream in the form of lease payments. It is also sufficiently large that the possibility of clustering two casinos adjacent to each other is a real possibility if the resulting traffic problems could be alleviated.

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**Navy Yard (1,200 acres)**

**IMAGE 2.36: Navy Yard Site**



**Source: Philadelphia City Planning Commission**

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## Site Suitability

### *Advantages*

- The Navy Yard site is controlled by the quasi-public Philadelphia Industrial Development Corporation (PIDC). A formal plan has been developed for the Navy Yard site entitled “2004 Philadelphia Navy Yard Plan Master Plan,” which calls for a mixed-use development consisting of office, retail, and residential uses combined with a marina and options for industrial uses, residential or golf course development. PIDC does not view gaming as particularly compatible with current master planning, citing primarily traffic-related issues. However, from a gaming perspective, all the proposed uses, with the possible exception of industrial development, would be compatible with a gaming development on this site.
- Only the eastern portion of the Navy Yard site would be eligible for gaming, as the western portion is within the exclusionary zone created by Chester Downs.
- The extensive acreage available and the extended waterfront would allow for attractive aesthetics to be developed and the creation of a distinct environment or theme for gaming.
- The site is likely to contain enough land to accommodate future expansion.
- The site is close to the stadium area with which it would generate significant synergy during events at those facilities.

### *Challenges*

- Due to the site’s location below the flood plain, substantial new development likely will require fill, pilings, and increased site preparation and infrastructure costs.
  - The site is not visible from the interstate, although effective signage could overcome this negative to some degree.
  - The site is not likely to be easily located for non-residents, although the prominence of the nearby stadiums and their familiarity to regional visitors may help it overcome this negative.
  - The site is not related directly to any tourist attractions or hotel concentrations.
  - The site is remote from the convention center.
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## Transportation

### *Advantages*

- I-95 provides highway access to the northeast and southwest and to I-76, which extends into Gloucester County via the Walt Whitman Bridge and beyond to Atlantic City. The interstate is some distance removed from the site and access would most likely be via Broad Street, which currently is the only primary access point into the entire Navy Yard site. There is some consideration in the PIDC master plan to widen Broad Street and add two more access points. New access at Delaware Avenue would be the most relevant for any consideration of gaming given the exclusion of the western portion of the site. PIDC has concluded that the costs associated with an extension of Delaware Avenue into the Navy Yard would be prohibitive given the need to bridge railroad tracks.
- By removing the weight of traffic away from Center City and the more congested portions of the waterfront, the traffic conflicts on I-676 can be reduced and traffic focused away from the more congested areas of the city.
- There is plenty of land to provide both surface and covered parking.
- There is sufficient space to provide for bus loading and unloading and for bus storage.
- Pedestrian access will be limited to future residential development within the Navy Yard site.
- The opportunity exists to re-start previously existing ferry service connecting the Navy Yard to South Jersey.

### *Challenges*

- The site would generate significant traffic conflicts with sports complex activity and increase congestion on already stressed local streets. This would require some mitigation treatment at the Broad Street entrance or the construction of an overpass to bring Delaware Avenue directly to the site over the intervening railroad tracks. Cost has been cited by the PIDC as being prohibitive with respect to this highway extension given the need to bridge railroad tracks. The problem is exacerbated by the current single point-of-access at Broad Street. Internal traffic circulation in relation to other proposed uses for the Navy Yard also will need to be resolved.
  - There is limited transit service in the form of bus service to the area. The nearest SEPTA station is the Pattison stop at the end of the Broad Street subway line located across the interstate at the stadium complex.
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- There is little or no pedestrian access to the site.

## **Economic Impact**

### ***Advantages***

- The development of a casino at this site could engender acceleration of the development of the Navy Yard complex and increase residential value of the area.
- The fact that the land is controlled by PIDC could provide the City of Philadelphia with some leverage to control design and a means to increase its economic participation in the profits of the venture through a lease of the property to a prospective operator.

### ***Challenges***

- The site has no meaningful relationship to entertainment, restaurant, nightclub/bar or hotel concentrations, although hotels are located a short drive away north of the sports complex and south along I-95 around the airport.
- The lack of transit and the site's location may limit access to the regional labor pool.
- An opportunity cost is associated with foregoing the existing Navy Yard master plan for phased mixed-use development.

## **I-76 & Route 1 Interchange Sites**

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The distinguishing common characteristic for the two potential gaming sites close to the I-76 and Route 1 interchange is their accessibility from the western Philadelphia suburbs and parts of northwestern Philadelphia in comparison to the other sites. Both the Budd and the Adam's Mark sites could more effectively maximize visitation and market share from these areas versus the racetrack casinos situated along the I-95 corridor.

The Budd site is large enough to allow for design flexibility, attractive landscaping, and extensive expansion. The site also could stimulate much needed redevelopment in the area and be integrated into a broader community development strategy. However, there is no relationship to tourist attractions, hotels, bars, nightclubs, or restaurants that would help maximize economic spin off. The site is not visible from I-76 and would likely be unfamiliar to non-residents, but will be highly visible to regular commuters on the Roosevelt Expressway (Route 1). The need for traffic circulation on local streets could cause traffic conflicts, but overall local street capacity is excellent.

The Adam's Mark site is well-positioned to capture gaming demand from the western Philadelphia suburbs, as well as high volumes of commuter and shopper traffic along City Avenue. A casino use would be fully compatible with nearby large office, commercial, and retail uses. The site is adequate for initial casino development, but could be constrained for further

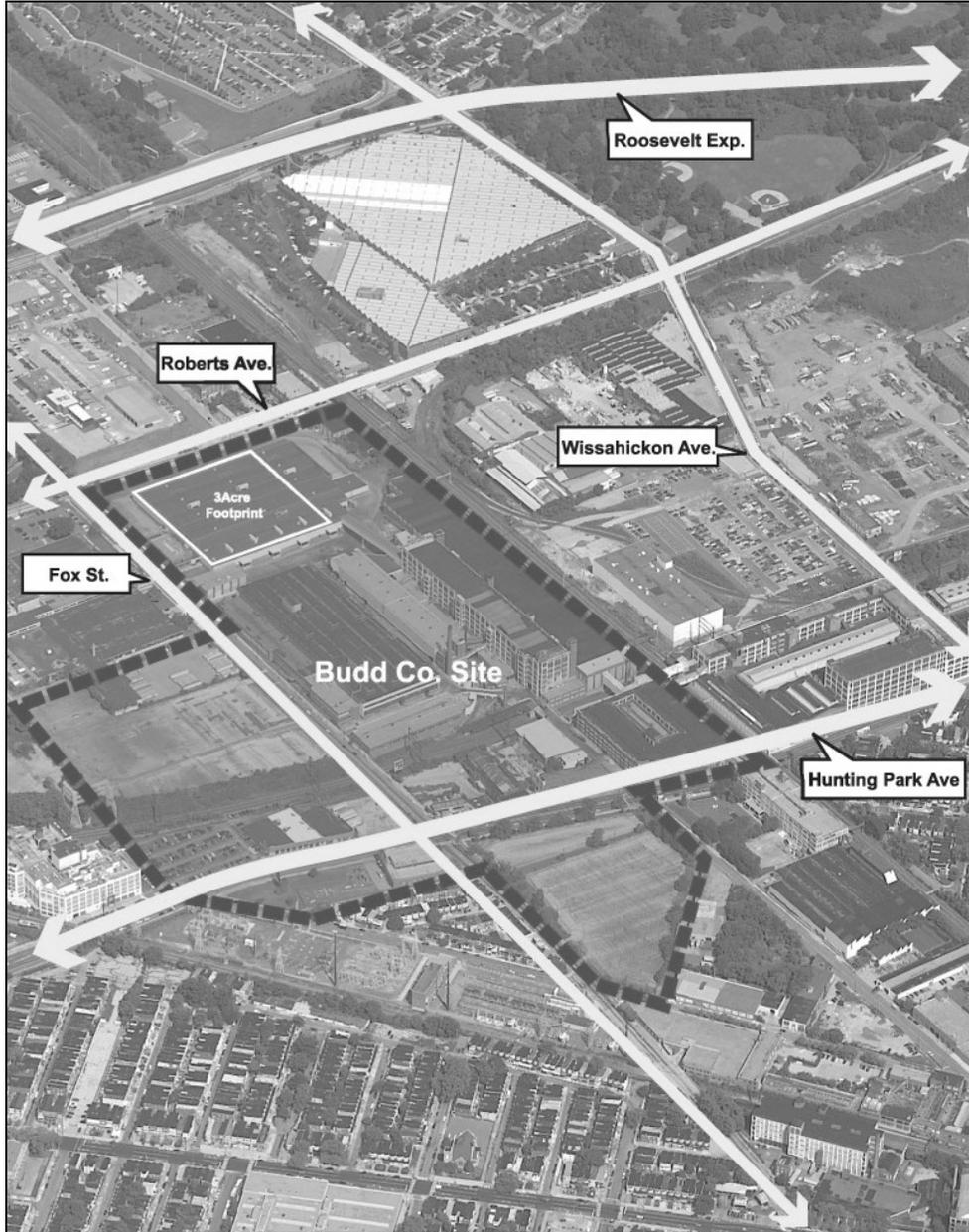
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expansion. Already heavy traffic volume and congestion along City Avenue is a concern.

Site assessments for these two potential gaming locations are presented separately below.

**Budd (75 acres)**

IMAGE 2.37: Budd Site



Source: Philadelphia City Planning Commission

## Site Suitability

### *Advantages*

- The site is large, including approximately 30 acres of unused warehouses among the 75 total acres. Surrounding development includes warehouses and residential uses. The

Task Force is unaware of any current planning policy for the area with which the casino development might be incompatible.

- Most of the surrounding land use is warehouse or light industrial with which a casino operation would not conflict. Some portions of the site border residential uses where conflicts might arise, and these areas should be avoided.
- The extensive acreage available would allow for flexibility of design and attractive landscaping to be developed.
- The site is likely to contain enough land to accommodate future expansion.
- Clustering of the two slots casinos is possible at the site if resulting traffic problems could be alleviated.
- From Henry Avenue and from buildings constructed along Henry Avenue, there are good views of the downtown skyline.

### ***Challenges***

- The industrial nature of the surrounding land uses makes the creation of attractive aesthetics challenging.
- The site would not be directly visible from I-76 or from Roosevelt Boulevard.
- The site is remote from the Convention Center, tourist attractions, and hotels.
- There is little synergy with surrounding land uses.
- Its non-central location away from Center City and tourist attractions and sports arenas may make it less familiar and harder to find for non-residents.

### **Transportation**

#### ***Advantages***

- The north side of the Budd property is one block away from the Roosevelt Expressway, which provides good access for commuters and patrons from northeast Philadelphia. US Route 1 also connects to I-76, providing excellent access to the higher-income western and northern suburbs in Montgomery and Bucks counties and to central Philadelphia to the south.
  - Adjacent local streets such as Hunting Park and Henry Avenues are very wide since they were designed to accommodate industrial tractor trailers. Traffic counts indicate that
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they could carry significant increases in traffic loads.

- The addition of a northbound ramp from the Roosevelt Expressway terminating close to the Budd site appears feasible, although at significant expense.
- By removing the weight of traffic away from Center City and the more congested portions of the waterfront, the traffic conflicts on I-676 can be reduced and traffic focused away from the more congested areas of the city.
- Public transit is proximate to the site in the form of bus service and the Allegheny station on SEPTA's R6 regional rail line. The Queen Lane station on SEPTA's R8 line is slightly further from the site. Due to the nature of Philadelphia's rail network, however, this location is not as efficient from a public transit perspective as Center City, where radial rail lines provide access from all parts of the region. At this site, out-of-direction travel and/or line transfers are required from most locations to access the site via transit, either rail or bus.
- There is plenty of land to provide both surface and covered parking.
- There is sufficient space to provide for bus loading and unloading and for bus storage.

### ***Challenges***

- The need to circulate traffic along local streets could cause traffic conflicts that will require mitigation.
- Existing congestion along the Roosevelt Expressway (Route 1) and I-76.
- Pedestrian access will be limited to residential development within the immediate vicinity of the site.

### **Economic Impact**

#### ***Advantages***

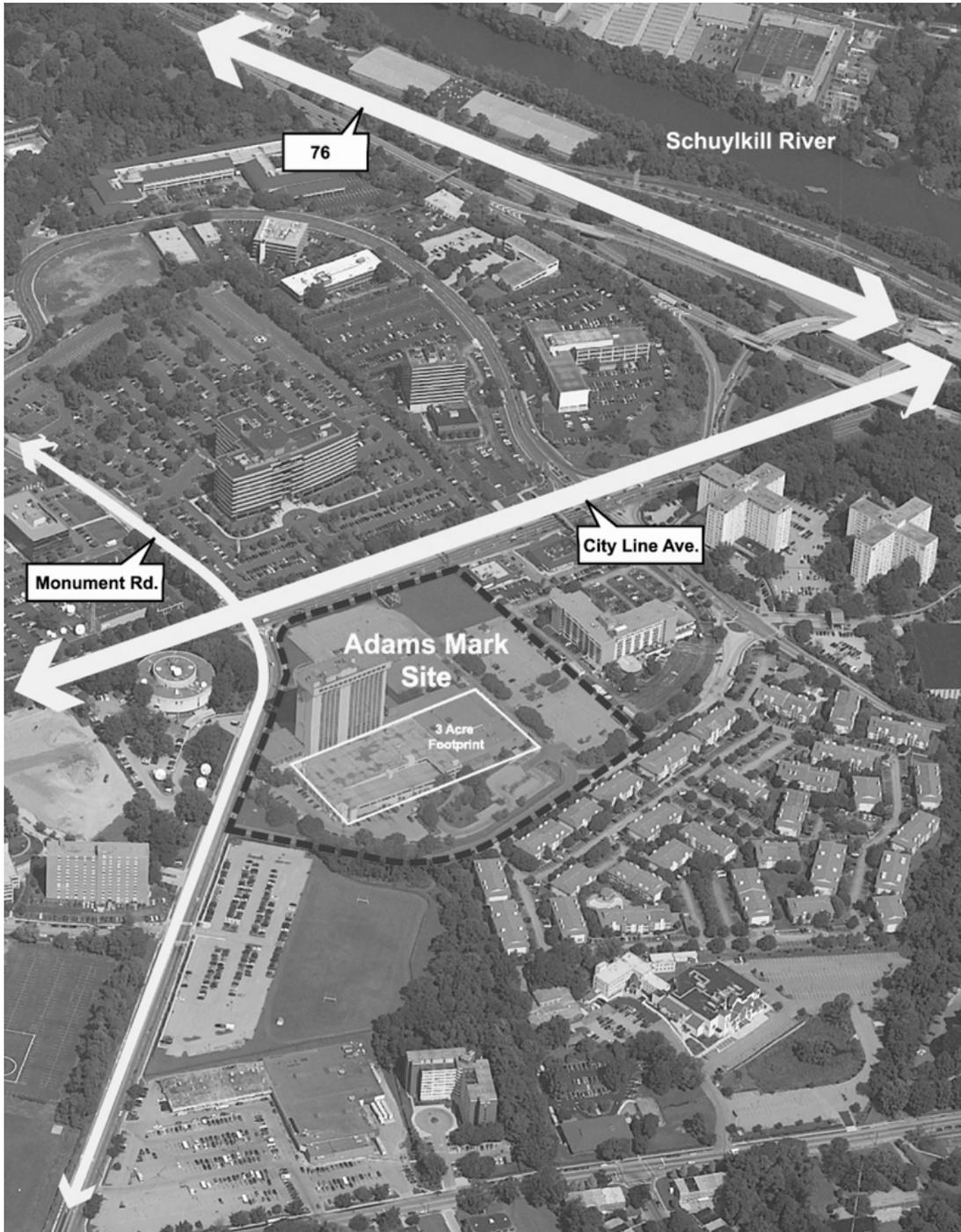
- The casino could spur master planned development of the entire site.
  - The site could engender both new development and redevelopment of the area, including nearby brownfield properties.
  - Large adjacent tracts are available for spin-off development.
  - The site is located close to a portion of the regional or city-wide labor pool that could benefit significantly from the jobs created. Being on the transit network provides additional access.
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***Challenges***

- The site has no meaningful relationship to entertainment, restaurant, nightclub/bar, or hotel concentrations.

Adam's Mark (14 acres)

IMAGE 2.38: Adam's Mark Site



Source: Philadelphia City Planning Commission

## Site Suitability

### *Advantages*

- Target Corporation in November 2004 purchased the site for planned construction of a retail store. Prior to the purchase, no formal redevelopment plans have been prepared for this portion of City Avenue, which is included within the service area of the City Avenue Special Services District.
- The Adam's Mark site is compatible with surrounding land uses, which are primarily office and commercial space. The development pattern along this portion of City Avenue is large-scale commercial/office buildings and shopping malls with significant set-backs, located mostly on the Lower Merion side of City Avenue with residential and hospital uses on the city side. The site is also proximate to the Channel 6 studios and a residential neighborhood.
- The site has sufficient land to accommodate initial development and offers the potential for reuse of the Adam's Mark building as a hotel or as a temporary gaming venue during construction of a permanent facility elsewhere on the site.
- Being located off of I-76 and the Roosevelt Expressway (US Route 1), this site should be relatively easy for non-residents to find.
- The site is close to two City Avenue hotels.
- There are no negative aesthetics surrounding the site.
- Infrastructure requirements are likely to be minimized.
- The site could maximize visitation from western Philadelphia suburbs compared to other sites.

### *Challenges*

- The site is not immediately visible from the interstate, although effective signage could overcome this to some degree.
  - There is limited potential synergy with nearby restaurants, such as TGI Friday's and Chili's, and retail stores, in particular nearby Saks Fifth Avenue and Lord & Taylor department stores. The auto-oriented nature of commercial and shopping strip development along City Avenue reduces potential synergies with nearby development.
  - The limited site size could inhibit future expansion.
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- The site is not proximate to tourist attractions.

## **Transportation**

### ***Advantages***

- The site is one block off of City Avenue near the I-76 interchange, providing good access for significant volumes of commuters and local traffic. Compared to other sites, this location along I-76 provides excellent access to the higher-income western and northern suburbs in Montgomery and Bucks counties and to central Philadelphia to the south.
- There is adequate space for on-site parking, but space constraints will require off-site bus storage and employee parking.
- By removing the weight of traffic away from Center City and the more congested portions of the waterfront, the traffic conflicts on I-676 can be reduced and traffic focused away from the more congested areas of the city.

### ***Challenges***

- While overall access is good via I-76, highway traffic congestion during business rush hour and at other times is a negative.
- City Avenue around the Adam's Mark site experiences heavy local traffic congestion due to high volumes entering and exiting I-76. Additional turning lanes off of City Avenue would likely be needed.
- Public transit access is limited to bus and there are no nearby SEPTA regional rail or subway lines.
- Pedestrian access will be limited to residential and office development within the immediate proximity of the site.

## **Economic Impact**

### ***Advantages***

- The site can capture a portion of the high volumes of commuters, office workers, and shoppers who pass through this portion of City Avenue.
- The site is close to a limited number of restaurants and hotels.

### ***Challenges***

- Significant amounts of ancillary non-gaming spending will be lost to Montgomery
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County due to the City Avenue location.

- The site is remote from the Convention Center and tourist attractions.
  - The site has no meaningful relationship to entertainment, nightclub/bar, or restaurant concentrations.
  - The already highly developed nature of the City Avenue corridor will likely reduce the amount of new development that can be expected in this area as a result of a new gaming venue, although existing businesses would be likely to realize significant benefits.
  - The lack of adequate transit may limit access to the regional labor pool and, in particular, residents of Philadelphia.
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