

2011

ANNUAL REPORT OF REVIEW ACTIVITY



BUCKS COUNTY PLANNING COMMISSION

2012 Bucks County Board of Commissioners



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SECTION 1

Introduction



This annual report is a summary of the subdivision, land development, and municipal proposals received by the Bucks County Planning Commission (BCPC) for review and comment as authorized by the Pennsylvania Municipalities Planning Code (Act 247 as amended). It is not intended, nor should it be interpreted, as a summary of the amount of construction activity or the number of housing units built within the county or a particular municipality during 2011. Information on construction activity may be obtained by contacting municipal building inspectors or zoning officers or the U.S. Census.

The information in this report provides an indication of what areas in the county might undergo development in the future. Comparisons are made with data from previous years to provide an indication of development

trends in the county. A concerted effort was made to eliminate duplication of the number of residential units and the amount of non-residential development proposed in the previous years. The number of lots and/or square footage of development were based on the most current plan submitted for review.

The number of reviews for 2011 reflects all the proposals submitted and reviewed during the year, including those that may have been reviewed also in a previous year at an early plan stage. In addition, where a subdivision or land development was reviewed more than once in the current year due to different planning stages, it was counted more than once as a reviewed proposal. This allows for an accurate account of the number of reviews conducted by staff during the year.

SECTION 2

Definitions

Housing Type

Attached—A building having: (i) only one dwelling structure from ground to roof, (ii) three or more dwelling units in each structure, (iii) independent outside access to each dwelling, and (iv) two or more walls in common with adjoining dwellings, with the exception of end units.

Detached—A single-family dwelling on an individual lot with yard space on all four sides.

Manufactured Home—A dwelling fabricated in an off-site manufacturing facility for installation or assembly at the building site, bearing a label certifying that it is built in compliance with the Federal Manufactured Housing Construction and Safety Standards. It is not constructed or equipped with a permanent hitch or other device allowing it to be moved other than for the purpose of moving to a permanent site, and it does not have any wheels or axles permanently attached to its body or frame. A mobile home is not a manufactured home.

Mobile Home—A transportable single-family dwelling which arrives at a site complete and ready for occupancy except for minor and incidental unpacking and assembly operations and is constructed so that it may be used without a permanent foundation.

Multifamily—A building containing more than two dwelling units and not elsewhere classified (high-rise, mid-rise, and garden apartments).

Semidetached—A building containing two dwelling units (twin, duplex).

Land Development

The improvement of one lot or two or more contiguous lots, tracts, or parcels of land for any purpose involving:

- a. A group of two or more residential or nonresidential buildings, whether proposed initially or cumulatively, or a single nonresidential building on a lot or lots regardless of the number of occupants or tenure; or
- b. The division or allocation of land or space, whether initially or cumulatively, between or among two or more existing or prospective occupants by means of, or for the purpose of streets, common areas, leaseholds, condominiums, building groups, or other features.

Major Subdivision

A proposal of three or more lots or units reviewed by the staff of the Bucks County Planning Commission.

Minor Subdivision

A proposal of fewer than three lots or units reviewed by the staff of the Bucks County Planning Commission.

Municipal Proposal

An application involving a zoning map change, ordinance amendment, new ordinance, comprehensive plan, the creation or extension of an agricultural security area, vacation of a public street or right-of-way, acquisition or sale of public ground, a new school or an addition to a school, etc., that is prescribed by the Municipalities Planning Code to be reviewed by the Bucks County Planning Commission.

Sketch Plan

An informal plan of future development that is reviewed by the staff of the Bucks County Planning Commission.

Subdivision

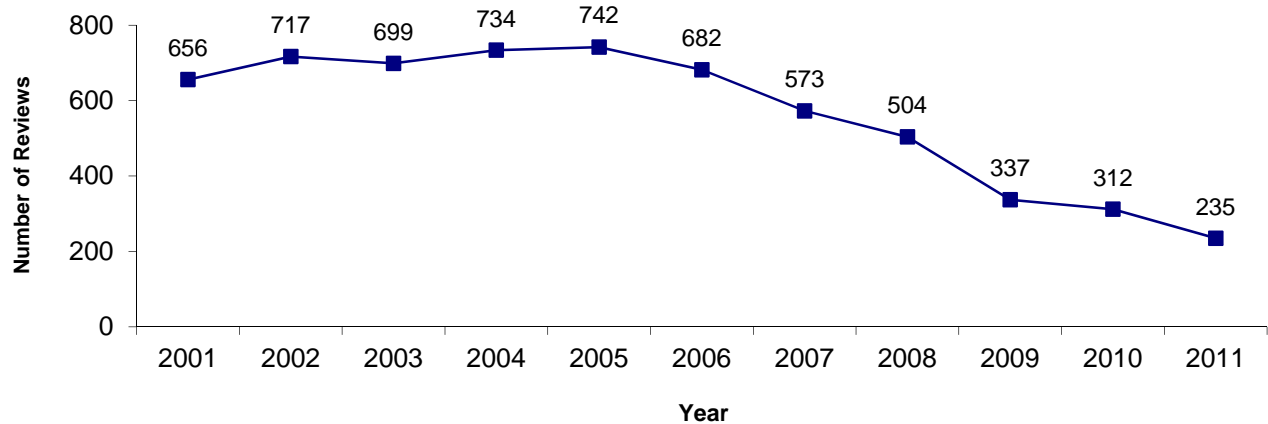
The division or redivision of a lot, tract, or parcel of land by any means into two or more lots, tracts, or parcels or other divisions of land including changes in existing lot lines for the purposes of transfer of ownership or building or lot development.

SECTION 3

Act 247 Review Activity

In 2011 the Bucks County Planning Commission and staff reviewed a total of 235 proposals submitted for subdivisions, land developments, and municipal actions. This was 25 percent less than last year's total of 312 reviews. The 2011 figure is the lowest since 1970. The graph below details the total number of reviews prepared each year since 2001. It also illustrates the variations in review activity.

FIGURE 1. Review Activity, 2001 to 2011



A breakdown of reviews into four categories reveals that in 2011, all four review categories decreased. The number of major, minor, sketch and municipal proposals reviewed in 2011 decreased by 15, 29, 25, and 32 percent, respectively.

The totals for the types of reviews conducted in 2011 and 2010 are summarized in Table 1, while Figure 2 shows the percentage of types of reviews for 2011. Table 2 on page 7 provides a breakdown by municipality.

TABLE 1. Review Activity by Type

REVIEW TYPE	2011 Number of Reviews	2010 Number of Reviews	Difference	Change
Major	102	120	-18	-15%
Minor	34	48	-14	-29%
Sketch	9	12	-3	-25%
Municipal	90	132	-42	-32%
TOTAL	235	312	-77	-25%

FIGURE 2. Review Activity, 2011

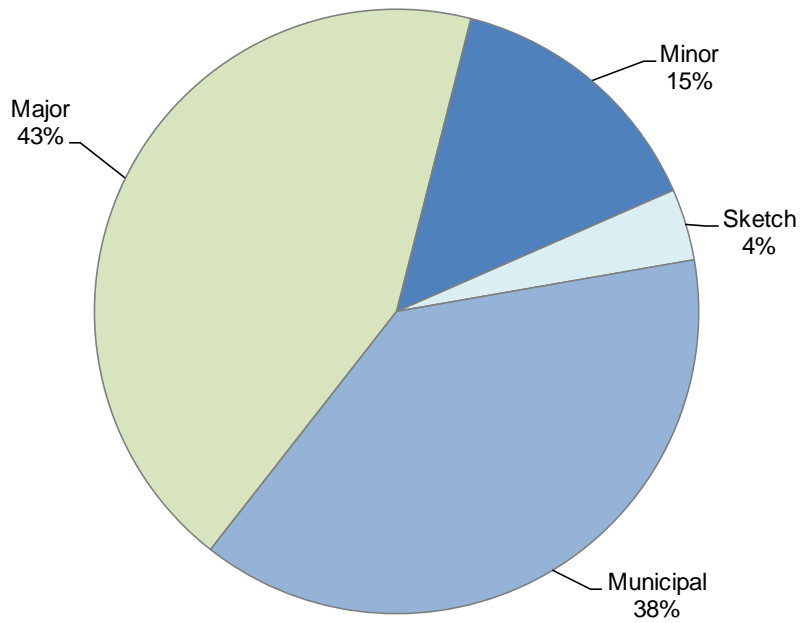


TABLE 2. Review Activity by Municipality, 2011

Municipality	Major	Minor	Sketch	Municipal	Total
Bedminster Township	2	0	0	2	4
Bensalem Township	7	5	0	4	16
Bridgeton Township	0	0	0	0	0
Bristol Borough	3	1	0	1	5
Bristol Township	2	1	0	3	6
Buckingham Township	2	0	1	1	4
Chalfont Borough	0	0	0	2	2
Doylestown Borough	1	0	0	0	1
Doylestown Township	4	0	1	1	6
Dublin Borough	0	0	0	0	0
Durham Township	0	1	0	0	1
East Rockhill Township	2	2	0	0	4
Falls Township	8	0	0	4	12
Haycock Township	0	0	0	0	0
Hilltown Township	3	1	0	5	9
Hulmeville Borough	0	0	0	0	0
Ivylnd Borough	0	0	0	2	2
Langhorne Borough	0	1	0	0	1
Langhorne Manor Borough	0	0	0	0	0
Lower Makefield Township	5	1	0	2	8
Lower Southampton Township	2	0	0	2	4
Middletown Township	5	0	3	2	10
Milford Township	3	4	0	0	7
Morrisville Borough	0	0	0	1	1
New Britain Borough	1	0	0	0	1
New Britain Township	3	2	0	3	8
New Hope Borough	1	0	0	2	3
Newtown Borough	0	0	0	5	5
Newtown Township	7	0	0	1	8
Nockamixon Township	0	0	0	1	1
Northampton Township	3	1	0	2	6
Penndel Borough	1	0	0	3	4
Perkasie Borough	2	1	0	0	3
Plumstead Township	2	3	0	3	8
Quakertown Borough	1	0	0	2	3
Richland Township	0	1	0	3	4
Richlandtown Borough	1	0	1	0	2
Riegelsville Borough	0	0	0	1	1
Sellersville Borough	0	0	0	0	0
Silverdale Borough	0	0	0	0	0
Solebury Township	2	3	0	2	7
Springfield Township	0	0	0	4	4
Telford Borough	2	0	0	1	3
Tinicum Township	1	0	0	3	4
Trumbauersville Borough	0	0	0	0	0
Tullytown Borough	0	0	0	0	0
Upper Makefield Township	1	0	1	3	5
Upper Southampton Township	2	0	0	1	3
Warminster Township	5	0	0	0	5
Warrington Township	8	4	1	3	16
Warwick Township	4	1	0	5	10
West Rockhill Township	2	0	1	8	11
Wrightstown Township	3	1	0	1	5
Yardley Borough	1	0	0	0	1
Quakertown Area Plng. Comm.	0	0	0	0	0
Newtown Area Jt. Plng. Comm.	0	0	0	1	1
Totals	102	34	9	90	235

SECTION 4

Subdivision and Land Development Activity

In accordance with sections 502 and 704 of the Pennsylvania Municipalities Planning Code (Act 247 as amended), all applications for subdivisions, land developments, and planned residential developments reviewed by municipalities must be submitted to the county planning agency for review and comment. The following describes the proposed residential and nonresidential subdivision and land development activity reviewed by the county planning agency in 2011. This activity may have a significant impact on the amount of land disturbed in the future. A municipal breakdown of the amount of land that may be potentially affected by the proposals submitted for review in 2011 is provided in Table 3 on page 10. This table includes only the land that is currently being farmed, is vacant, or is considered rural residential (a parcel which is five acres or larger and contains an existing residence). Given their size, rural residences usually contain significant open space and vacant area and allow for additional subdivision and development.



As Table 3 indicates, 392 acres of farm, vacant, and rural residential land could be impacted by the residential and nonresidential development proposed in 2011. This is the lowest amount of land potentially impacted by proposed development since this type of information has been recorded by the BCPC, and it is 16 acres less than the amount recorded in 2010. If the 2011 proposals were developed, nearly 52 acres (13 percent) would be preserved as open space, park and recreation land, and/or conservation easements. Northampton Township had the greatest amount of farm, vacant, and rural residential land (57 acres) associated with proposals in 2011, followed by Warrington (50 acres) and Bensalem townships (45 acres). Most of the land that could be impacted in Northampton is agricultural land, compared with rural residential in Warrington Townships and vacant land in Bensalem Township. Figure 3 shows the percentage of land potentially impacted by proposed development in 2011.

FIGURE 3. Land Potentially Impacted by Proposed Development, 2011 (392 acres)

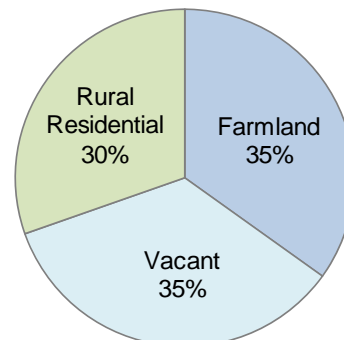


TABLE 3. Land Potentially Impacted by Proposed Development, 2011*

Municipality	Proposed Residential Development				Proposed Nonresidential Development				Total Proposed Development			
	Farmland	Vacant	Rural Residential	Total Acreage	Farmland	Vacant	Rural Residential	Total Acreage	Farmland	Vacant	Rural Residential	Total Acreage
Bedminster Township	0	7	0	7	15	0	0	15	15	7	0	21
Bensalem Township	0	45	0	45	0	0	0	0	0	45	0	45
Bridgeton Township	0	0	0	0	0	0	0	0	0	0	0	0
Bristol Borough	0	1	0	1	0	3	0	3	0	4	0	4
Bristol Township	0	0	0	0	0	30	0	30	0	30	0	30
Buckingham Township	0	0	0	0	0	0	0	0	0	0	0	0
Chalfont Borough	0	0	0	0	0	0	0	0	0	0	0	0
Doylestown Borough	0	0	0	0	0	0	0	0	0	0	0	0
Doylestown Township	0	0	37	37	0	0	0	0	0	0	37	37
Dublin Borough	0	0	0	0	0	0	0	0	0	0	0	0
Durham Township	5	0	0	5	0	0	0	0	5	0	0	5
East Rockhill Township	0	0	0	0	0	0	0	0	0	0	0	0
Falls Township	0	0	0	0	0	0	0	0	0	0	0	0
Haycock Township	0	0	0	0	0	0	0	0	0	0	0	0
Hilltown Township	0	0	8	8	0	0	0	0	0	0	8	8
Hulmeville Borough	0	0	0	0	0	0	0	0	0	0	0	0
Ivyland Borough	0	0	0	0	0	0	0	0	0	0	0	0
Langhorne Borough	0	0	0	0	0	0	0	0	0	0	0	0
Langhorne Manor Borough	0	0	0	0	0	0	0	0	0	0	0	0
Lower Makefield Township	0	0	0	0	41	0	0	41	41	0	0	41
Lower Southampton Township	0	0	0	0	0	0	0	0	0	0	0	0
Middletown Township	0	0	0	0	0	0	0	0	0	0	0	0
Milford Township	2	0	0	2	0	12	0	12	2	12	0	14
Morrisville Borough	0	0	0	0	0	0	0	0	0	0	0	0
New Britain Borough	0	0	0	0	0	0	0	0	0	0	0	0
New Britain Township	0	17	13	29	0	0	0	0	0	17	13	29
New Hope Borough	0	0	0	0	0	0	0	0	0	0	0	0
Newtown Borough	0	0	0	0	0	0	0	0	0	0	0	0
Newtown Township	0	0	0	0	0	0	0	0	0	0	0	0
Nockamixon Township	0	0	0	0	0	0	0	0	0	0	0	0
Northampton Township	57	0	0	57	0	0	0	0	57	0	0	57
Pennel Borough	0	0	0	0	0	0	0	0	0	0	0	0
Perkasie Borough	0	0	0	0	0	0	0	0	0	0	0	0
Plumstead Township	0	0	10	10	0	0	0	0	0	0	10	10
Quakertown Borough	0	0	0	0	0	0	0	0	0	0	0	0
Richland Township	0	0	0	0	0	0	0	0	0	0	0	0
Richlandtown Borough	0	0	0	0	0	0	0	0	0	0	0	0
Riegelsville Borough	0	0	0	0	0	0	0	0	0	0	0	0
Sellersville Borough	0	0	0	0	0	0	0	0	0	0	0	0
Silverdale Borough	0	0	0	0	0	0	0	0	0	0	0	0
Solebury Township	0	0	0	0	0	0	0	0	0	0	0	0
Springfield Township	0	0	0	0	0	0	0	0	0	0	0	0
Telford Borough	0	0	0	0	0	2	0	2	0	2	0	2
Tinicum Township	0	0	0	0	0	0	0	0	0	0	0	0
Trumbauersville Borough	0	0	0	0	0	0	0	0	0	0	0	0
Tullytown Borough	0	0	0	0	0	0	0	0	0	0	0	0
Upper Makefield Township	0	0	0	0	0	0	0	0	0	0	0	0
Upper Southampton Township	0	0	13	13	0	0	0	0	0	0	13	13
Warminster Township	0	0	0	0	0	15	0	15	0	15	0	15
Warrington Township	17	0	33	50	0	0	0	0	17	0	33	50
Warwick Township	0	0	3	3	0	0	0	0	0	0	3	3
West Rockhill Township	0	0	0	0	0	4	0	4	0	4	0	4
Wrightstown Township	0	0	4	4	0	0	0	0	0	0	4	4
Yardley Borough	0	0	0	0	0	0	0	0	0	0	0	0
Totals	81	69	119	269	56	67	0	123	137	136	119	392

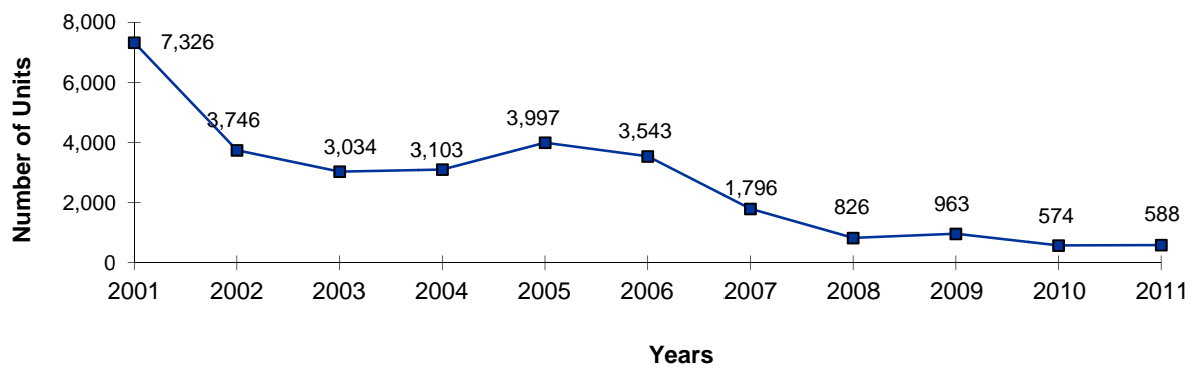
*Table 3 represents the potential amount of farm, vacant, and rural residential (parcels over five acres with an existing residence) land that may be developed/ consumed if proposed development in 2011 would be constructed. The acreage does not include land with existing development, except for rural residential properties.

RESIDENTIAL PROPOSALS



The development proposals reviewed by the planning commission in 2011 contained a total of 588 residential units. This is an increase of approximately 2 percent or 14 units from the 2010 figure of 574 units. Figure 4 illustrates the total number of proposed residential development units each year since 2001. The 2010 and 2011 figures are similar to the low levels of residential activity seen in the late 1960s and early 1970s.

FIGURE 4. Proposed Residential Development, 2001 to 2011



For the fifth year in a row, proposed single-family detached lots failed to retain the typical dominant position amongst other residential units, coming second to multifamily units. The 114 single-family detached lots accounted for approximately 20 percent of the dwelling units proposed by development plans in 2011 and represents an increase of 25 percent from the 2010 figure of 91. The number is considerably less than annual amounts proposed since the early 1980s, and continues an overall decline in the annual number of proposed single-family detached lots experienced since 2001.



Multifamily units (248) represent the largest residential category in 2011 and the residential category experiencing the largest increase in units (164) from 2010. Attached units experienced a significant decrease (217) while semidetached saw an increase (44). Multifamily units, along with semidetached and attached units, help to meet the demand of first time homebuyers, empty nesters, and persons needing more affordable housing. The total number of semidetached, multifamily, and attached units accounted for over 81 percent of residential units proposed in 2011. The figures represent the seventh year in a row and the eighth time since the mid-1980s that the combined number of these unit types outpaced the number of single-family units.

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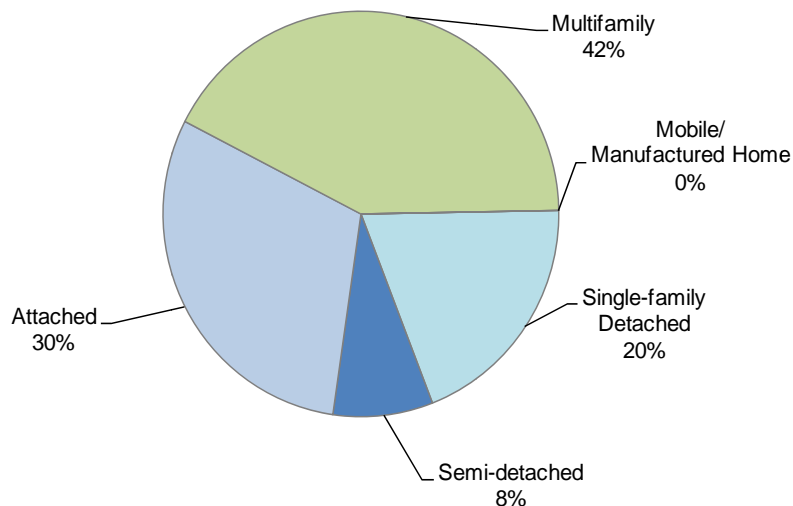
There were no age-qualified units proposed in 2011, the first time since these types of units began to be recorded that there were no proposals for age-qualified developments. This marks a continued reduction in proposals of these types of units. There were only 81 age-qualified units proposed in one development in 2010. The annual average of proposed age-qualified units for the eight previous years (2002 to 2009) was over 600 units.

Finally, zero mobile/manufactured homes in a park setting were proposed in 2011. A summary of 2010 and 2011 data for residential development is shown in Table 4. Figure 5 shows the breakdown of the number of units by type for 2011.

TABLE 4. Housing Types Proposed, 2011 and 2010

HOUSING TYPE	2011 Number of Units	2010 Number of Units	Difference	Change
Single-family	114	91	23	25%
Semidetached	48	4	44	1100%
Attached	178	395	-217	-55%
Multifamily	248	84	164	195%
Mobile/Manufactured Home	0	0	0	-
TOTAL	588	574	14	2%

FIGURE 5. Proposed Residential Activity, 2011



Central Bucks communities accounted for 65 percent (384 units) of all units proposed in the county in 2011. The lower Bucks region came in second with 34 percent (198) while upper Bucks trailed significantly with only 1 percent (6) of the units proposed in the county. These figures represent the third year in a row that central Bucks was the leader in the number of proposed residential units. They also represent a regional ratio similar to that seen in 2010 except that the percentage of units proposed in central and lower Bucks decreased by 6 percent while lower Bucks increased by the same percentage.

New Britain Township in central Bucks had the highest number of proposed units (234), representing 40 percent of all proposed units in the county. Moreover, all of these proposed units were multifamily units as part of one development, comprising all the multifamily units proposed in the county in 2011. Bensalem Township in lower Bucks had the second highest number of total proposed units (184) and accounted for all of the attached units proposed in 2011. Similar to Warrington, these units were associated with one proposed development. Combined, central and lower Bucks communities accounted for all the attached and multifamily units proposed in 2011.

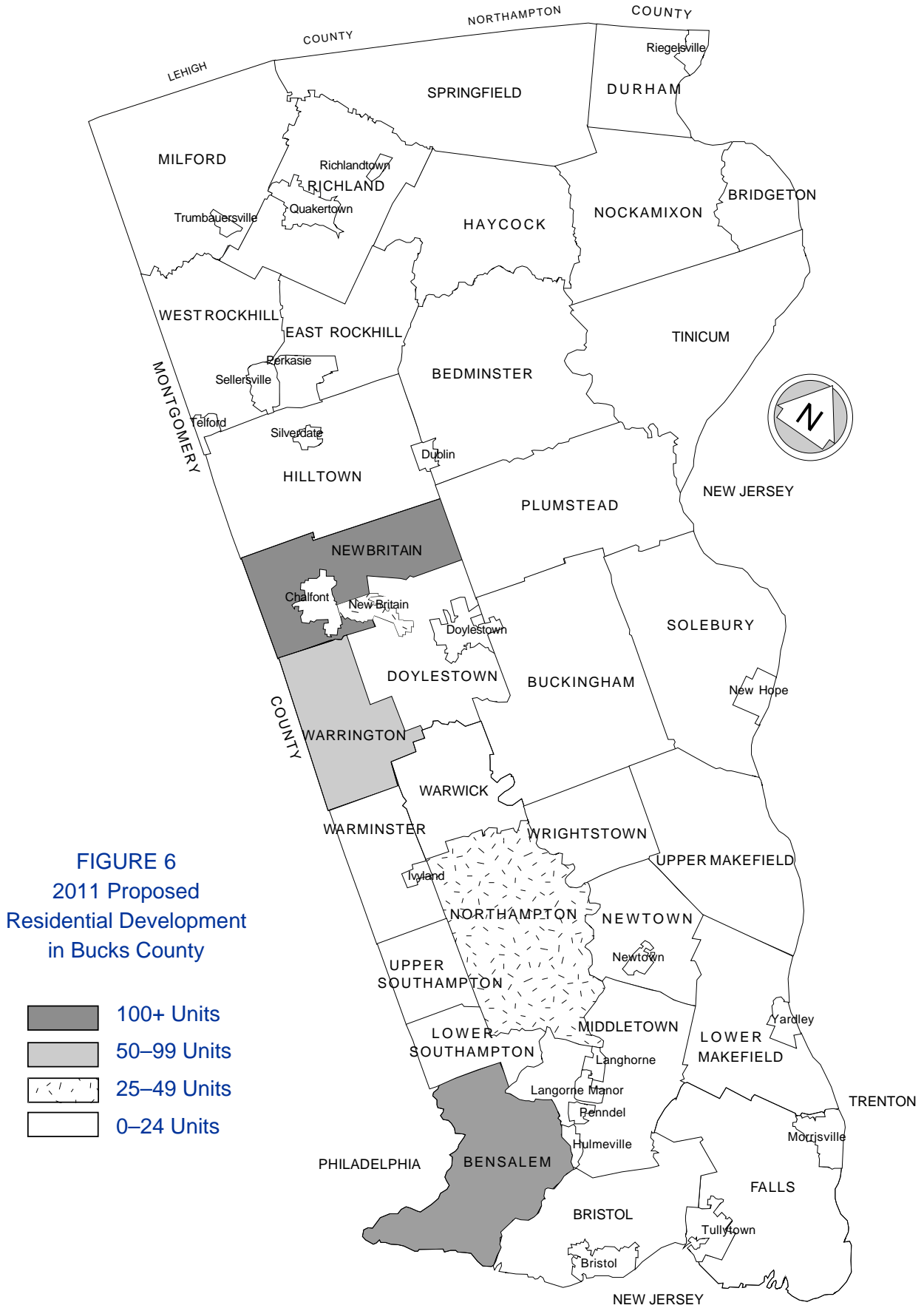
Single-family detached units proposed in 2011 were concentrated in the central Bucks region. Over 77 percent (88) of all proposed single-family detached units were located in central Bucks. Lower Bucks accounted for 18 percent (20), while upper Bucks trailed with only 5 percent (6) of the single-family detached units proposed in the county. Northampton Township had the highest number of proposed single-family detached units (41) followed by Warrington Township (25).

The 48 semidetached units proposed in 2011 were all located in Warrington Township.

A breakdown of residential development proposals by municipality is provided in Table 5 on page 14 and shown on Figure 6 on page 15. Also, Appendix A provides information regarding residential proposals of more than 100 units. There were no residential proposals of 50 to 100 units in 2011.

TABLE 5. Proposed Residential Development, 2011

Municipality	Single-family Detached	Semi Detached	Attached	Multi-family	Mobile Homes	Total
Bedminster Township	2	0	0	0	0	2
Bensalem Township	6	0	178	0	0	184
Bridgeton Township	0	0	0	0	0	0
Bristol Borough	4	0	0	0	0	4
Bristol Township	1	0	0	0	0	1
Buckingham Township	0	0	0	0	0	0
Chalfont Borough	0	0	0	0	0	0
Doylestown Borough	0	0	0	0	0	0
Doylestown Township	12	0	0	0	0	12
Dublin Borough	0	0	0	0	0	0
Durham Township	1	0	0	0	0	1
East Rockhill Township	0	0	0	0	0	0
Falls Township	1	0	0	0	0	1
Haycock Township	0	0	0	0	0	0
Hilltown Township	1	0	0	0	0	1
Hulmeville Borough	0	0	0	0	0	0
Ivyland Borough	0	0	0	0	0	0
Langhorne Borough	1	0	0	0	0	1
Langhorne Manor Borough	0	0	0	0	0	0
Lower Makefield Township	0	0	0	0	0	0
Lower Southampton Township	4	0	0	0	0	4
Middletown Township	1	0	0	0	0	1
Milford Township	2	0	0	0	0	2
Morrisville Borough	0	0	0	0	0	0
New Britain Borough	0	0	0	0	0	0
New Britain Township	2	0	0	232	0	234
New Hope Borough	0	0	0	16	0	16
Newtown Borough	0	0	0	0	0	0
Newtown Township	0	0	0	0	0	0
Nockamixon Township	0	0	0	0	0	0
Northampton Township	41	0	0	0	0	41
Penndel Borough	2	0	0	0	0	2
Perkasie Borough	0	0	0	0	0	0
Plumstead Township	3	0	0	0	0	3
Quakertown Borough	0	0	0	0	0	0
Richland Township	0	0	0	0	0	0
Richlandtown Borough	0	0	0	0	0	0
Riegelsville Borough	0	0	0	0	0	0
Sellersville Borough	0	0	0	0	0	0
Silverdale Borough	0	0	0	0	0	0
Solebury Township	0	0	0	0	0	0
Springfield Township	0	0	0	0	0	0
Telford Borough	0	0	0	0	0	0
Tinicum Township	0	0	0	0	0	0
Trumbauersville Borough	0	0	0	0	0	0
Tullytown Borough	0	0	0	0	0	0
Upper Makefield Township	2	0	0	0	0	2
Upper Southampton Township	0	0	0	0	0	0
Warminster Township	0	0	0	0	0	0
Warrington Township	25	48	0	0	0	73
Warwick Township	2	0	0	0	0	2
West Rockhill Township	0	0	0	0	0	0
Wrightstown Township	1	0	0	0	0	1
Yardley Borough	0	0	0	0	0	0
Totals	114	48	178	248	0	588



ANALYSIS OF RESIDENTIAL DEVELOPMENT TRENDS

The historically unprecedented low number of housing units proposed in Bucks County continued for the fifth year in a row. On the heels of 2010's record-setting 574 units, the 588 units proposed in 2011 are the second fewest number of units proposed in Bucks County since 1970. In the five years previous to 2007 the number of dwellings proposed averaged 3,485.

A sharp downturn in the national economy occurred in 2006. The National Bureau of Economic Research has declared an end to the recession as of June 2009, making this the longest recession since World War II. However, this date represents only the low point of U.S. economic activity. While economic indicators such as unemployment and GDP are improving, a full recovery is still a long way off.

The national housing market showed some signs of recovery toward the end of 2011. Housing starts are up to an annual rate of 685,000, the highest in 19 months. Mortgage rates remain at all-time lows, and surveys indicate that builder confidence in initiating new projects is increasing.

But overshadowing improving conditions in the housing market is the large backlog of foreclosures that have not been processed due to delays by lenders and the legal system. There remains the potential for an additional glut of homes to hit the existing-home market and further depress prices and slow sales.

Most troubling are the struggles in the local real estate market. In 2011, the 12-county Philadelphia region saw a 5.7 percent drop in median prices, and homes averaged 102 days on the market versus the previous year's 87 days. In Bucks County, median home prices fell 6.8 percent during 2011 and went from averaging 90 days on the market to 103.¹

Since 2005, multifamily and single-family attached units have dominated proposed housing. In 2011, multifamily and attached housing represented over 72 percent of the units proposed. About 8 percent of the total units proposed were semi-detached dwellings.

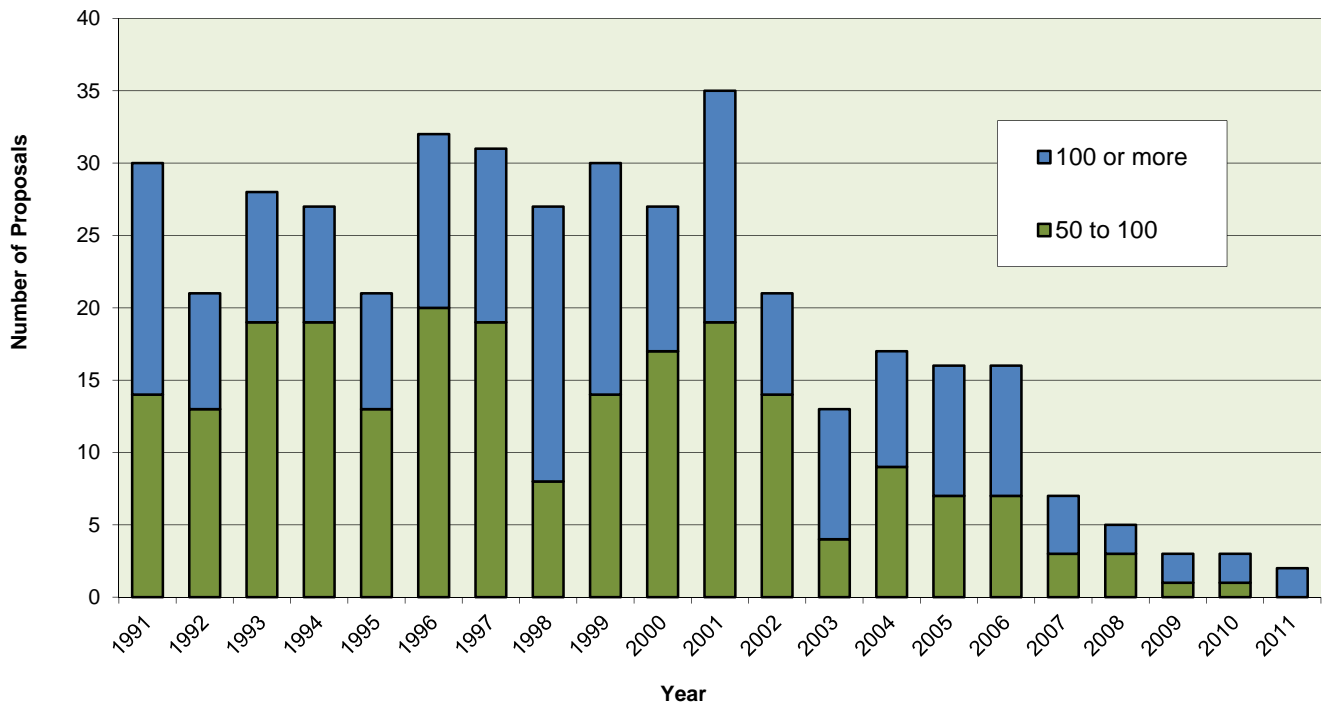
Only 114 single-family detached dwellings were proposed in 2011 and only 91 were proposed in 2010. Only 141 were proposed in 2009. By comparison, the average yearly number of single-family detached dwellings proposed for the 1997-2006 period was 2,528 dwellings. Developers continue to look to fill a market need by providing more affordable housing opportunities to first-time home buyers, seniors, and singles.

Over the past eight years, fewer total units and fewer large-scale developments have been proposed. 2011 saw only two proposals over 100 units and no proposals between 50 and 100 units.

¹ Prudential Fox & Roach Realtor's HomeExpert Market Report, Year-End 2011.

The forecast for 2012 is mixed. Nationally, the housing industry has become more optimistic: builders are beginning to make new plans and mortgage rates remain very low. However, the economic recovery has been slow, as shown by the small improvements in GDP and unemployment. After a year of stability in 2010, local housing prices in 2011 continued their fall and houses averaged more days on the market. Further, it is uncertain whether a significant backlog of foreclosures will soon hit the market, with the potential to depress prices and significantly affect the existing- and new-home markets. We again predict only a modest increase in the number of proposed units for 2012.

FIGURE 7. Proposals, 50 to 100 and 100 or More Units, 1991–2011



NONRESIDENTIAL PROPOSALS

Information on nonresidential activity is arranged according to the following categories: the number of lots/units proposed through subdivision, number of land development proposals, and the amount of square footage proposed in land developments (both new and reuse).

A total of 12 nonresidential lots (i.e., lots without a proposed building) were proposed in 2011,² a increase of 71 percent from the 2010 total. The number of proposed commercial and institutional lots from nonresidential subdivisions increased in 2011 by 1 and 5, respectively, while the number of industrial lots remained at one and office lots decreased by 1.

² These lots do not include units associated with institutional use proposals such as continuing care facilities.

TABLE 6. Proposed Nonresidential Subdivisions

TYPE OF USE	2011 Number of Lots	2010 Number of Lots	Difference	Change
Commercial	6	5	1	20%
Industrial	1	1	0	0%
Institutional	5	0	5	-
Office	0	1	-1	-100%
TOTAL	12	7	5	71%

The number of nonresidential land developments reviewed in 2011 totaled 52, 10 less than the total for 2010. The number of commercial, industrial, and office land development proposals decreased between 2010 and 2011 while the number of institutional land development proposals increased significantly. Table 7 includes each land development proposal submitted for review in 2011 and 2010. Where a proposal contained mixed uses, each use was counted in the appropriate category.

TABLE 7. Reviews of Nonresidential Land Developments

TYPE OF USE	2011 Number of Reviews	2010 Number of Reviews	Difference	Change
Commercial	17	33	-16	-48%
Industrial	14	18	-4	-22%
Institutional	17	6	11	183%
Office	4	5	-1	-20%
TOTAL	52	62	-10	-16%

In 2011, proposals totaling nearly 2.8 million square feet of building area were reviewed. This is a increase of 149 percent from the amount reviewed in 2010. As Figure 9 shows, the amount of nonresidential development proposed per year decreased significantly since 2000. The 8.7+ million square feet of proposed nonresidential development in 2000 was the largest annual amount recorded since 1981. Between 2000 and 2002, however, proposed nonresidential development decreased by nearly 5 million square feet. The amount of proposed building area in 2003 showed a slight rebound to over 4.5 million square feet; however, the figures between 2003 and 2008 averaged a little over 3.1 million square feet. The amount in 2009 was a rebound to levels seen in 2002 and 2003. The 1.1+ million square feet proposed in 2010 was the smallest annual amount recorded since 1981. The

2011 figure is a rebound very close to the 2003 through 2008 levels. A summary of proposed nonresidential square footage by type is provided in Figure 10 and Table 8.

FIGURE 8. Proposed Nonresidential Land Development, 2001 to 2011

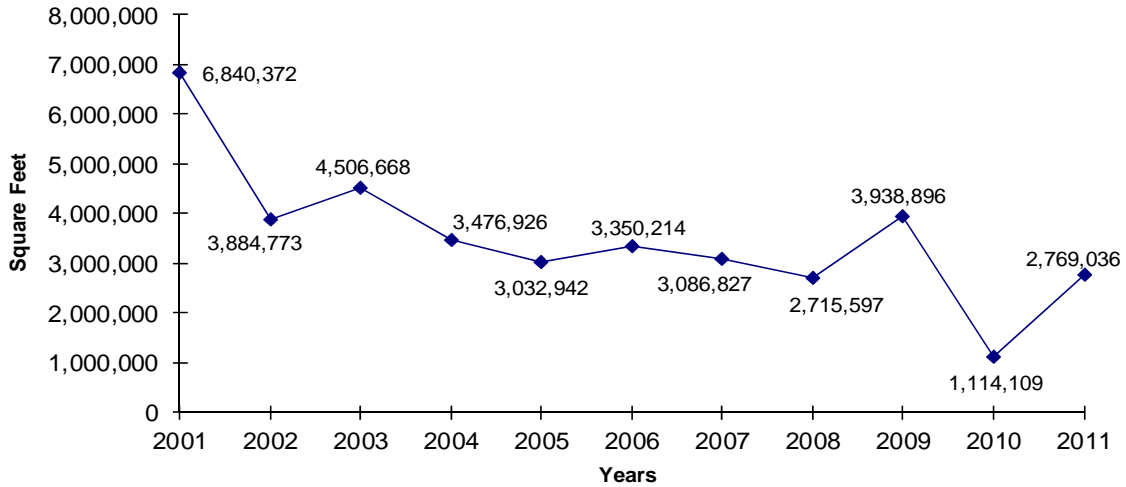


FIGURE 9. Proposed Nonresidential Land Development, 2011

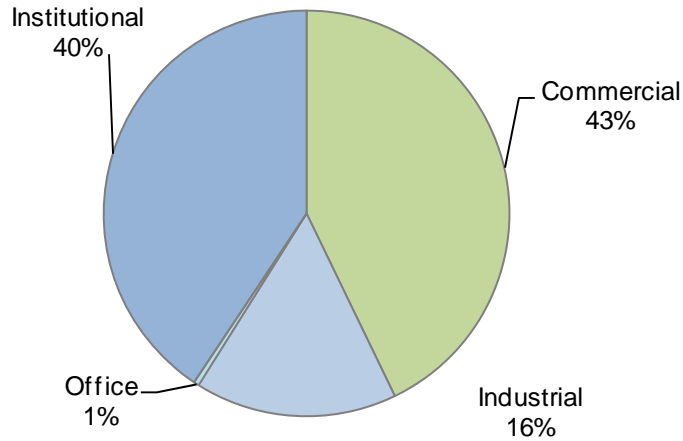


TABLE 8. Proposed Square Feet of Nonresidential Land Development

TYPE OF USE	2011	2010	Difference	Change
Commercial	1,186,091	597,908	588,183	98%
Industrial	445,673	226,247	219,426	97%
Institutional	1,125,560	238,488	887,072	372%
Office	11,712	51,466	-39,754	-77%
TOTAL	2,769,036	1,114,109	1,654,927	149%

Proposals for commercial land developments in 2011 totaled nearly 1.2 million square feet representing the largest amount of space compared with other nonresidential categories. The amount was a 98 percent increase from the commercial space proposed in 2010, and it is the second highest amount of proposed commercial space since 2003.



The majority of the proposed commercial development (74 percent) was located in lower Bucks. Over a quarter of the proposed commercial development was located in central Bucks with the remainder located in upper Bucks (less than 1 percent).

The vast majority of proposed commercial space (nearly 800,000 square feet) was in Bensalem Township. Most of this space (760,000 square feet) was associated with the parking garage expansion at the Parx Casino. There was only one other municipality, Warminster Township in central Bucks, that had more than 100,000 square feet of proposed commercial space. And there were two other municipalities—Doylestown Township in central Bucks and Middletown Township in lower Bucks—that had more than 50,000 square feet of proposed commercial space.



The amount of square footage proposed for industrial uses increased by nearly 220,000 square feet from the 1/4 million square feet in 2010, a 97 percent increase. While the 2011 figure marks a slight up-swing in proposed industrial development, it is the second lowest amount recorded since 1984. The figure must be looked at with additional caution since nearly 60 percent of the proposed square footage is related to one development.

The largest percentage (62 percent) of industrial development proposed in 2011 was located in lower Bucks and almost all of this was associated with a 260,000-square-foot

manufacturing/warehouse facility proposed in Bristol Township. Proposals in Bensalem Township (10,650 square feet) and Falls Township (7,200 square feet) made up the majority of the remaining proposed industrial development in lower Bucks County. About 20 percent of proposed industrial development was located in central Bucks and another 18 percent was located in upper Bucks. In central Bucks, Doylestown Township had the greatest amount of industrial square footage proposed with 60,000 square feet associated with a warehouse facility. The upper Bucks proposed industrial square footage was comprised of a helicopter research/development facility in Hilltown Township (48,600 square feet) and two food wholesale and printing services facilities in Telford Borough (30,700 square feet total).

Proposals for institutional land developments in 2011 totaled over 1.1 million square feet, a 372 percent increase from the 2010 total of nearly 240,000 square feet. The institutional development proposed in 2011 was associated with health care facilities (71 percent), long-term care facilities (15 percent), religious places (6 percent), community facilities (4 percent), and government facilities (1 percent). Nearly 73 percent of the institutional development proposed in 2011 was located in lower Bucks. Lower Makefield and Middletown townships had the greatest amount of institutional development proposed (455,000 and 350,600 square feet, respectively), associated with a proposed hospital and a health center and wellness campus. Proposals in upper and central Bucks accounted for 18 and 9 percent of the institutional development in the county.



Proposed office space in 2011 decreased by 77 percent from 2010 figures. The more than 11,700 square feet proposed in 2011 is the lowest amount of proposed office space recorded since this type of space was tracked as part of the Annual Report of Review Activity (1981). All of the county's 2011 proposed office space was located in central Bucks. This space was associated with two proposed medical offices in Buckingham and Newtown townships and an office building addition in Plumstead Township.

For the first time in three years, lower Bucks communities accounted for the majority of the total nonresidential development in the county (72 percent), much of it in Bensalem, Lower Makefield and Middletown townships. The 2011 lower Bucks figure revivals the high amounts and percentages of nonresidential development proposed in the region from 2005 to 2007, and continues to demonstrate that the lower Bucks area has room for expansion and growth and indicates that the region continues to be important in providing economic sustainability. The central Bucks region continues to experience increases in nonresidential development, spurred on by a maturing residential base. Central Bucks accounted for 18 percent of the proposed nonresidential development in 2011, the lowest percentage in over 10 years. The upper Bucks region accounted for only 10 percent of the proposed nonresidential development in 2011. In general, upper Bucks does not have the residential base of either lower or central Bucks County that would sustain significant nonresidential

development. The percentage in 2011 is mainly related to industrial proposals in Hilltown Township and Telford Borough and institutional proposals in West Rockhill, Richland, and Milford townships. Refer to Table 9 and Figure 11 for municipal figures and distribution. Appendix B lists all nonresidential land developments reviewed by the Bucks County Planning Commission in 2011.

ANALYSIS OF NONRESIDENTIAL DEVELOPMENT TRENDS

Office space continued its fall in 2011, dropping all the way to 11,712 square feet from 2010's total of 51,466 square feet and 2009's five-year high of 688,189 square feet. Vacancy rates in suburban office space still remain high. The lower/central Bucks area is estimated to have a 23.9 percent vacancy rate.³ Office space will continue to struggle in 2012.

Proposed industrial space experienced modest gains in 2011, increasing from 226,247 square feet to 445,673 square feet. Activity in the suburban industrial market is reported to be increasing and a recent survey of regional manufacturers suggests optimism for the coming year.⁴ Bucks County is reported to have a 6.1 percent vacancy rate, below the suburban county rate of 8.2 percent.² A further increase in proposed industrial space is likely for 2012.

Retail commercial development is more difficult to establish a trend for. Investment in retail commercial projects is based on individual market studies that analyze population increases, disposable income gains, available commercially-zoned land, and underserved areas for types of shopping centers.

Proposed commercial square footage took a surprising jump in 2011, increasing from 597,908 to 1,186,091 square feet. This occurred despite a slight increase in the vacancy rates of suburban Pennsylvania counties and renewed concerns about economic conditions.² Proposed commercial space is unlikely to increase in 2012 and may decline.

Institutional expansions probably are most closely related to increases in population and changes in the composition of the population. With an increase and composition change in population will come an increase in public need for institutional services, such as healthcare and religious services. Institutional development in Bucks County has remained steady over the past decade—with some fluctuation—reflecting the county's stable growth in population.

As predicted in the 2010 report, 2011 saw a modest increase in square footage, with total proposed space more typical of the 2005-2009 period. Many economists believe that the economic recovery will continue its slow pace in 2012. We again predict only modest increases in proposed nonresidential development for 2012.

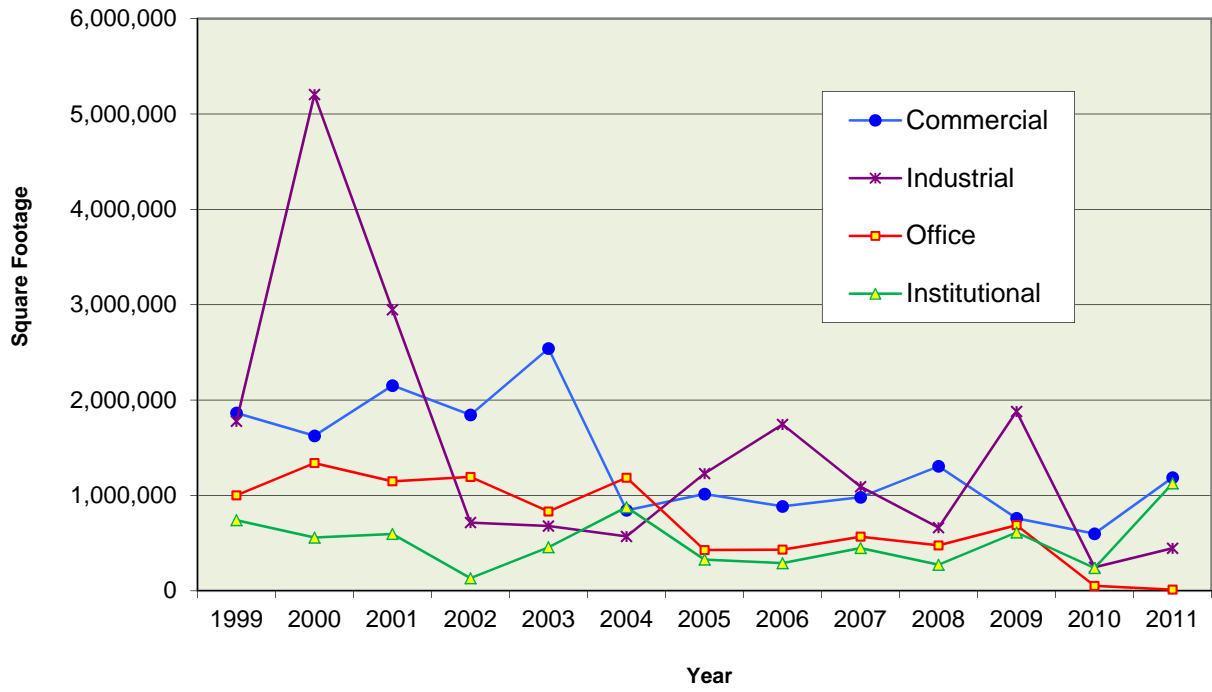
³ Colliers International, *Research & Forecast Report, Q4 2011*.

⁴ Federal Reserve Bank of Philadelphia, *Business Outlook Survey, January 2012*.

TABLE 9. Proposed Nonresidential Development, 2011

Municipality	Commercial Square Feet	Commercial Lots	Industrial Square Feet	Industrial Lots	Office Square Feet	Office Lots	Institutional Square Feet	Institutional Lots/Units
Bedminster Township	0	0	0	0	0	0	37,750	2
Bensalem Township	798,712	0	10,645	0	0	0	0	0
Bridgeton Township	0	0	0	0	0	0	0	0
Bristol Borough	0	0	0	0	0	0	13,850	0
Bristol Township	0	1	260,000	1	0	0	0	0
Buckingham Township	0	0	0	0	2,968	0	0	0
Chalfont Borough	0	0	0	0	0	0	0	0
Doylestown Borough	0	0	0	0	0	0	6,646	0
Doylestown Township	66,466	0	60,000	0	0	0	5,400	0
Dublin Borough	0	0	0	0	0	0	0	0
Durham Township	0	0	0	0	0	0	0	0
East Rockhill Township	0	0	0	0	0	0	9,833	0
Falls Township	0	0	7,200	0	0	0	0	0
Haycock Township	0	0	0	0	0	0	0	0
Hilltown Township	0	0	48,600	0	0	0	0	0
Hulmeville Borough	0	0	0	0	0	0	0	0
Ivyland Borough	0	0	0	0	0	0	0	0
Langhorne Borough	0	0	0	0	0	0	0	0
Langhorne Manor Borough	0	0	0	0	0	0	0	0
Lower Makefield Township	1,215	0	0	0	0	0	455,000	0
Lower Southampton Township	0	0	0	0	0	0	0	0
Middletown Township	77,081	0	0	0	0	0	350,600	0
Milford Township	0	1	0	0	0	0	32,271	1
Morrisville Borough	0	0	0	0	0	0	0	0
New Britain Borough	0	0	0	0	0	0	0	0
New Britain Township	4,800	2	0	0	0	0	0	0
New Hope Borough	0	0	0	0	0	0	0	1
Newtown Borough	0	0	0	0	0	0	0	0
Newtown Township	48,587	0	0	0	2,067	0	58,650	0
Nockamixon Township	0	0	0	0	0	0	0	0
Northampton Township	5,500	0	0	0	0	0	15,300	0
Penndel Borough	0	0	0	0	0	0	0	0
Perkasie Borough	3,000	0	0	0	0	0	0	0
Plumstead Township	14,415	0	0	0	6,677	0	0	0
Quakertown Borough	0	0	0	0	0	0	12,281	0
Richland Township	0	0	0	0	0	0	55,880	0
Richlandtown Borough	0	0	0	0	0	0	0	0
Riegelsville Borough	0	0	0	0	0	0	0	0
Sellersville Borough	0	0	0	0	0	0	0	0
Silverdale Borough	0	0	0	0	0	0	0	0
Solebury Township	0	0	0	0	0	0	0	0
Springfield Township	0	0	0	0	0	0	0	0
Telford Borough	0	0	30,665	0	0	0	0	0
Tinicum Township	0	2	0	0	0	0	0	0
Trumbauersville Borough	0	0	0	0	0	0	0	0
Tullytown Borough	0	0	0	0	0	0	0	0
Upper Makefield Township	12,415	0	0	0	0	0	0	0
Upper Southampton Township	0	0	0	0	0	0	0	0
Warminster Township	149,000	0	8,623	0	0	0	0	0
Warrington Township	0	0	19,940	0	0	0	0	0
Warwick Township	0	0	0	0	0	0	15,505	0
West Rockhill Township	0	0	0	0	0	0	56,594	0
Wrightstown Township	0	0	0	0	0	0	0	1
Yardley Borough	4,900	0	0	0	0	0	0	0
TOTALS	1,186,091	6	445,673	1	11,712	0	1,125,560	5

FIGURE 11. Proposed Nonresidential Development by Type, 1999–2011



SECTION 5

Municipal Activity

In accordance with the provisions of sections 301.3, 304, 305, 408, 504, 505, 609, and 609.1 of the Pennsylvania Municipalities Planning Code, municipalities must submit proposals concerning requests for zoning map changes, zoning ordinance amendments, subdivision and land development ordinance amendments, comprehensive plans, curative amendments, official maps, and other proposals (school district reviews, street vacations, acquisitions of public ground, sewage facilities plan update, etc.) to the county planning commission for review and comment.

During 2011, the Bucks County Planning Commission reviewed a total of 90 municipal proposals. This is a decrease of 32 percent from the number of proposals submitted in 2010. The majority of municipal proposals were zoning and subdivision and land development ordinance amendments. The number of ordinance amendments decreased by 38 (39 percent) in 2011. Zoning map changes decreased by 13 percent (3). There were five new complete ordinances reviewed in 2011. In addition, there were two comprehensive plan/plan amendment proposals reviewed in 2011 as compared to five in 2010.

Other proposals, such as school district reviews and sewerage facility plan updates, decreased by 22 percent (4) from 2010. Three school district proposals were reviewed in 2011; however, only one resulted in new proposed school space (16,370 square feet) and was associated with an addition to existing elementary school. Table 10 provides a summary of municipal proposals reviewed by type and Table 11 provides municipal totals.

TABLE 10. Municipal Proposals by Type

TYPE OF PROPOSAL	2011 Number of Proposals	2010 Number of Proposals	Difference	Change
Zoning Map Change	13	15	-2	-13%
Ordinance Amendment	56	94	-38	-40%
Curative Amendment	0	0	0	-
New Ordinances	5	0	5	-
Comprehensive Plan	2	5	-3	-60%
Official Map	0	0	0	-
Other *	14	18	-4	-22%
TOTAL	90	132	-42	-32%

* Other proposals include Agriculture Security Area extensions, school district reviews, water and sewer plan updates, street vacations, and acquisition of public lands.

TABLE 11. Municipal Proposals by Municipality, 2011

Municipality	Zoning Map Change	Ordinance Amendment	Curative Amendment	New Ordinance	Comprehensive Plan Amendment	Official Map	Other ASA, CR, SD WS, Septa	Total
Bedminster Township	1	2	0	0	0	0	0	3
Bensalem Township	3	0	0	0	0	0	0	3
Bridgeton Township	0	0	0	0	0	0	0	0
Bristol Borough	0	0	0	0	0	0	1	1
Bristol Township	1	2	0	0	0	0	0	3
Buckingham Township	0	1	0	0	0	0	0	1
Chalfont Borough	0	2	0	0	0	0	0	2
Doylestown Borough	0	0	0	0	0	0	0	0
Doylestown Township	0	1	0	0	0	0	0	1
Dublin Borough	0	0	0	0	0	0	0	0
Durham Township	0	0	0	0	0	0	0	0
East Rockhill Township	0	0	0	0	0	0	0	0
Falls Township	0	2	0	0	0	0	2	4
Haycock Township	0	0	0	0	0	0	0	0
Hilltown Township	2	3	0	0	0	0	0	5
Huimeville Borough	0	0	0	0	0	0	0	0
Ivyland Borough	0	2	0	0	0	0	0	2
Langhorne Borough	0	0	0	0	0	0	0	0
Langhorne Manor Borough	0	0	0	0	0	0	0	0
Lower Makefield Township	0	1	0	0	0	0	1	2
Lower Southampton Township	2	0	0	0	0	0	0	2
Middletown Township	0	0	0	0	0	0	2	2
Milford Township	0	0	0	0	0	0	0	0
Morrisville Borough	0	1	0	0	0	0	0	1
New Britain Borough	0	0	0	0	0	0	0	0
New Britain Township	0	2	0	0	0	0	1	3
New Hope Borough	0	1	0	0	1	0	0	2
Newtown Borough	0	5	0	0	0	0	0	5
Newtown Township	0	0	0	0	0	0	1	1
Nockamixon Township	0	1	0	0	0	0	0	1
Northampton Township	0	2	0	0	0	0	0	2
Penndel Borough	0	3	0	0	0	0	0	3
Perkasie Borough	0	0	0	0	0	0	0	0
Plumstead Township	0	2	0	0	1	0	0	3
Quakertown Borough	0	2	0	0	0	0	0	2
Richland Township	0	2	0	0	0	0	1	3
Richlandtown Borough	0	0	0	0	0	0	0	0
Riegelsville Borough	0	0	0	1	0	0	0	1
Sellersville Borough	0	0	0	0	0	0	0	0
Silverdale Borough	0	0	0	0	0	0	0	0
Solebury Township	0	2	0	0	0	0	0	2
Springfield Township	0	0	0	2	0	0	2	4
Telford Borough	0	0	0	1	0	0	0	1
Tinicum Township	0	3	0	0	0	0	0	3
Trumbauersville Borough	0	0	0	0	0	0	0	0
Tullytown Borough	0	0	0	0	0	0	0	0
Upper Makefield Township	0	3	0	0	0	0	0	3
Upper Southampton Township	1	0	0	0	0	0	0	1
Warminster Township	0	0	0	0	0	0	0	0
Warrington Township	1	2	0	0	0	0	0	3
Warwick Township	0	4	0	1	0	0	0	5
West Rockhill Township	2	5	0	0	0	0	1	8
Wrightstown Township	0	0	0	0	0	0	1	1
Yardley Borough	0	0	0	0	0	0	0	0
Quakertown Area Plng. Comm.	0	0	0	0	0	0	0	0
Newtown Area Jt. Plng. Comm.	0	0	0	0	0	0	1	1
Totals	13	56	0	5	2	0	14	90

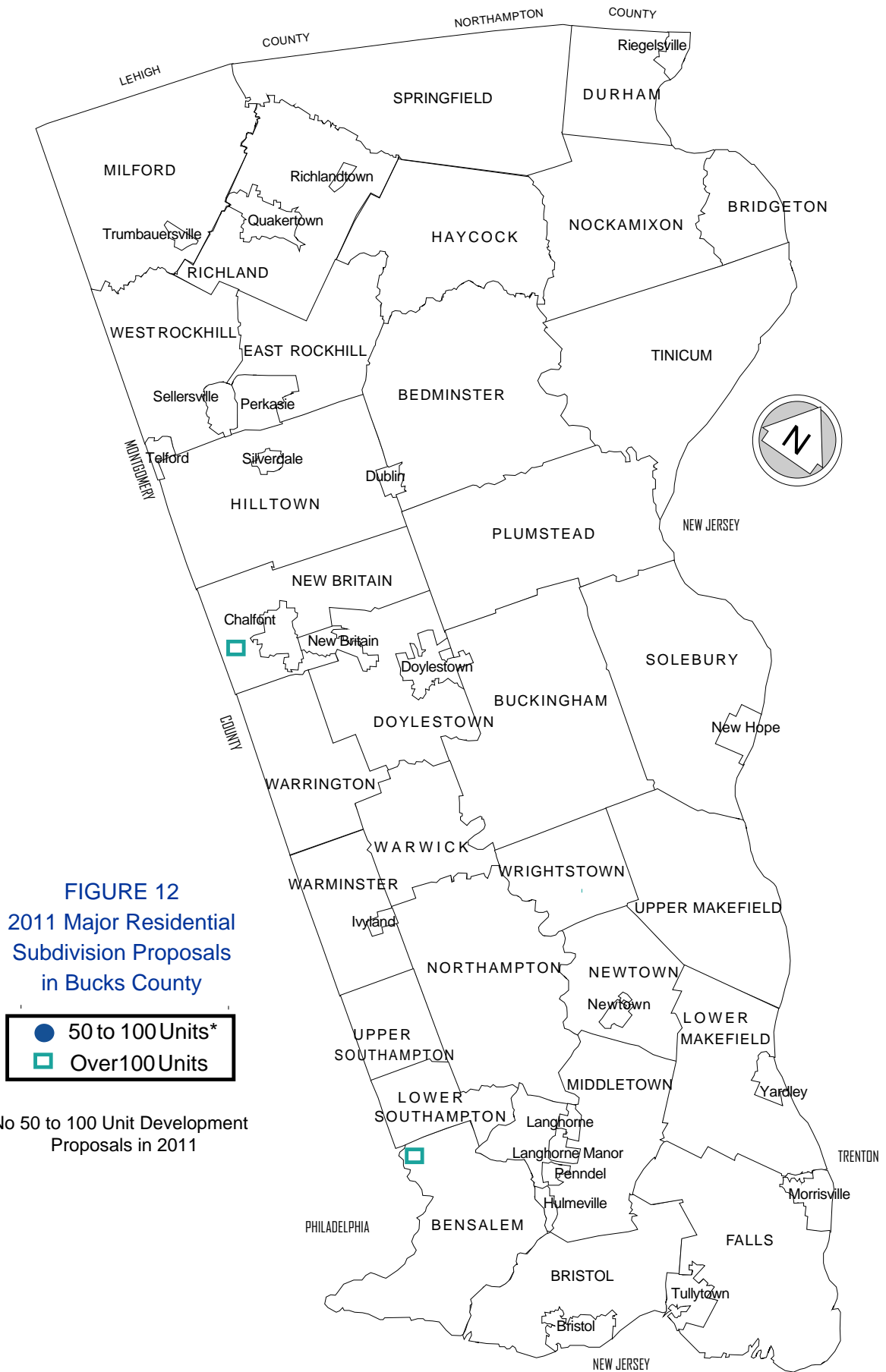
SECTION 6

Planning Module Review Activity

The Pennsylvania Sewage Facilities Act (Act 537 of 1970) requires county planning agencies to review sewage facilities planning modules for land development. During 2011, staff reviewed 20 planning modules as compared to 25 in 2011. The review of the modules is coordinated with the review of the corresponding subdivision or land development.

TABLE 12. Planning Module Reviews, 2011

Bensalem Township	1
Bristol Township	1
Hilltown Township	1
Lower Southampton Township	2
Milford Township	3
New Britain Township	1
Nockamixon Township	1
Northampton Township	1
Plumstead Township	1
Springfield Township	1
Upper Makefield Township	1
Warminster Township	4
Warrington Township	1
Wrightstown Township	1
TOTAL	20



APPENDIX A RESIDENTIAL PROPOSALS OVER 100 UNITS

Municipality: Bensalem Township
 BCPC File No.: 11001-A
 Plan Type: Preliminary Plan of Subdivision and Land Development for Somerton Homes
 TMP No. 2-6-1 and 2-7-2
 Applicant: Somerton Valley Homes, LLP
 Owner: Somerton Valley Homes, LLP
 Location: Southwest of the intersection of Somerton and Carters Mill roads.
 Proposal: Subdivide 44.552 acres into 178 attached dwellings lots, ranging from 2,160 square feet to 7,305 square feet. Nine open space areas totaling 25.43 acres will be preserved. The site will be served by public water and sewerage.

Municipality: New Britain Township
 BCPC File No.: 6169-N
 Plan Type: Preliminary Plan of Land Development for Madison at New Britain
 TMP No. p/o 26-5-49
 Applicant: New Britain Land L.P.
 Owner: New Britain Land L.P.
 Location: East side of Manor Drive between County Line and Schoolhouse roads.
 Proposal: Construction of a total of 232 multifamily housing units (apartments) in twelve buildings and a 4,800 square-foot clubhouse on a parcel of 16.56 acres. This parcel "Lot 5" is proposed to be subdivided from an existing 44.71-acre parcel on the site of the New Britain Corporate Center. The proposed subdivision that would create Lot 5 was submitted as a separate plan (See BCPC #6169-A, dated October 31, 2011. Public water and sewer will serve the site.


APPENDIX B PROPOSED NONRESIDENTIAL LAND DEVELOPMENTS

Commercial

<i>Municipality</i>	<i>BCPC File No.</i>	<i>Name</i>	<i>Proposed Square Feet</i>
Bensalem Township	10327-D	Parx Casino-West Side Improvements	38,712
Bensalem Township	10327-E	Parx Casino - Parking Garage	760,000
Doylestown Township	11859	Thompson Toyota	62,146
Lower Makefield Township	11856	Wells Fargo Bank	1,215
Middletown Township	9855-A	Giant Food Store Fuel Island	3,712
Middletown Township	11849	Jared, The Galleria of Jewelry	6,047
Middletown Township	10244-B	Reedman-Toll Quick-Lube & Service Ctr.	67,312
Newtown Township	11838	Beneficial Bank	3,186
Newtown Township	5616-C	McDonald's USA, LLC	3,911
Newtown Township	7957-D	Newtown Athletic Club-Baseball & Pool	41,490
Northampton Township	11824	1978 North Second Street Pike, LLC	5,500
Perkasie Borough	4053-B	American Heritage Fed. Credit Union	3,000
Plumstead Township	11858	Bailey's Square	14,415
Upper Makefield Township	11821	Washington Crossing Inn	12,415
Warminster Township	11814	Costco Wholesale	149,000
Yardley Borough	11860	DeNovio	4,900

Industrial

<i>Municipality</i>	<i>BCPC File No.</i>	<i>Name</i>	<i>Proposed Square Feet</i>
Bensalem Township	11840	Gianni	4,000
Bensalem Township	7255-B	Joseph John, Inc.	6,645
Bristol Township	6823-A	AMPOL, L.L.C.	260,000
Falls Township	11855	CNG Fueling Station - Fleet 500	1,300
Falls Township	4465-E	South End Auto Parts, Inc.	1,580
Falls Township	6253-LL	AE Polysilicon Corp.	4,320

Industrial (cont.)

<i>Municipality</i>	<i>BCPC File No.</i>	<i>Name</i>	<i>Proposed Square Feet</i>
Hilltown Township	8650-B	Carson Helicopters, Inc.	48,600
Telford Borough	9655-A	Indian Ridge Provisions, Inc.	13,265
Telford Borough	11850	Altek Business Systems	17,400
Warminster Township	11843	Petroleum Products Corporation	8,623
Warrington Township	11836	Penn Valley Pump	10,873
Warrington Township	11832	Polysciences, Inc.	9,067

Institutional

<i>Municipality</i>	<i>BCPC File No.</i>	<i>Name</i>	<i>Proposed Square Feet</i>
Bedminster Township	11817	Living Hope Community Church	37,750
Bristol Borough	11825	Public Works Facility	13,850
Doylestown Borough	11833	Our Lady of Mount Carmel Church	6,646
Doylestown Township	10562-A	Pine Run Community	5,400
East Rockhill Township	5441-B	First Baptist Church of Perkasio	9,833
Lower Makefield Township	11352-A	Aria Health Hospital	455,000
Middletown Township	11844	Saint Mary Medical Center	344,600
Middletown Township	11820	Oxford Valley Chapel	6,000
Milford Township	11209-A	Community Baptist Church	32,271
Newtown Township	11828	Birches of Newtown	58,650
Northampton Township	11831	Twining Village Independent Living	15,300
Quakertown Borough	11846	Morning Star Fellowship	12,281
Richlandtown Borough	7791-A	Phoebe Richland Health Care Center	55,880
Warwick Township	11812	Warwick Township Fire Co. No.1	12,709
Warwick Township	11818	Neshaminy Warwick Presby. Church	2,796
West Rockhill Township	9819-B	Perkasie Borough Authority	26,894
West Rockhill Township	8187-B	Hidden Meadows on the Ridge	29,700

Office

<i>Municipality</i>	<i>BCPC File No.</i>	<i>Name</i>	<i>Proposed Square Feet</i>
Buckingham Township	8794-A	Buckingham Family Medicine	2,968
Newtown Township	11823	Dr. Weglos Dental Practice	2,067
Plumstead Township	11829	Solardelphia Office Expansion	6,677

Mixed Use Developments

<i>Municipality</i>	<i>BCPC File No.</i>	<i>Name</i>	<i>Proposed Square Feet</i>
Doylestown Township	11847	The Pavillion at Furlong	4,320 Commercial 60,000 Industrial
New Britain Township	6169-N	Madison at New Britain	4,800 Commercial 232 Multifamily Units

