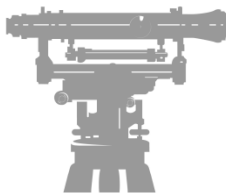


Nicetown CDC

Nicetown Economic Development and Housing Strategy

A plan for improvements to the Nicetown Germantown Avenue Commercial
Corridor and surrounding neighborhood



Prepared by Sherick Project Management
May 2012



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Executive Summary

The Nicetown Community Development Corporation is an energetic CDC that has worked hard to change Nicetown for the better. Based on the significant progress they have made over the past decade, in early 2011 the Commerce Department provided funding support to complete an economic development and housing strategy for the Nicetown Germantown Avenue commercial corridor that will build on the momentum they have created. Despite the economic downturn, Nicetown is seeing tremendous investment and growth. Within the last few years, a number of redevelopment projects have gotten off the ground in and around Nicetown representing over \$180 million in area investment and providing the catalyst for additional, significant community revitalization. This plan represents an effort to identify the potential for additional development and create strategies designed to realize that potential, ensuring that every investment dollar leverages additional growth.

Using a process that involved a planning team, advisory committee and input from neighborhood businesses and residents, Nicetown CDC conducted analyses of commercial activity and area housing, circulated surveys to corridor businesses and shoppers, and gathered feedback from residents and stakeholders on neighborhood priorities. All of this information was then used to create recommendations for stimulating economic development on and around the Germantown Avenue commercial corridor and building a strong housing base to support economic growth.

This plan contains recommendations for economic and housing development, and also addresses quality of life issues including infrastructure, safety and community services that impact the effectiveness of community development strategies. Recommended goals and activities include:

Economic Development

Goals:

- Focus on creating a diverse business mix in Corridor, rather than only retail business attraction.
- Be strategic in selecting locations for investment.
- Create opportunities for businesses to move in with low fit-out investment.
- Retain long-time businesses.
- Encourage TOD uses at Wayne Junction.
- Facilitate opportunities for non-store retailers.
- Make marketing and promotion activities a priority for the Business Association.

Recommended Activities:

- 1) Complete development of incubator and business support space at 4159-63 Germantown Ave.
- 2) Conduct a coordinated façade/streetscape improvement program for the 4100 through 4400 blocks of Germantown Avenue.
- 3) Provide technical assistance for upgrading physical plant at owner-occupied businesses.
- 4) Inventory available space and communicate with targeted brokers.

- 5) Investigate Business Improvement District (BID) feasibility.
- 6) Use social media to involve business people who may not be able to attend meetings.
- 7) Develop and implement a cart/street vendor plan.
- 8) Develop and implement a TOD marketing plan for Nicetown Court II and the newly created Wayne Junction historic district.

Housing Development

Goals:

- Prioritize housing development in areas where economic development has occurred or is slated to occur.
- Eliminate blight in highly visible areas.
- Create additional anchor sites that are visually significant and will encourage further economic development efforts.
- Fight against outmigration that weakens the economic health of the neighborhood.

Recommended Activities:

- 1) In addition to Nicetown Courts I & II, complete third anchor development at 1801 Courtland Street.
- 2) Conduct a phased homeownership/rental blight removal program that includes a scattered site tax credit rental project and the Housing Rehabilitation Program.
- 3) Use Targeted Housing Preservation Program (THPP) funds in conjunction with the phased homeownership/rental program.
- 4) Market housing opportunities in the newly created Wayne Junction historic district.

Recommended Quality of Life Activities:

Infrastructure

- 1) Work with the Streets Department to make improvements to traffic flow around Germantown Avenue.
- 2) Expand commuter parking options for Wayne Junction Station.
- 3) Extend planned commercial corridor streetscape improvements to other sections of Germantown Avenue.

Open Space

- 1) Incorporate streetscape improvements into open spaces on Germantown Avenue.
- 2) Create additional active space in Nicetown Park.
- 3) Develop a budget and timeline to transform vacant land under the Roosevelt Boulevard overpass into a skate park.
- 4) Work with the Federal Transportation Administration to address blighted conditions on CSX property along Windrim Avenue.

Safety

- 1) Incorporate safety enhancements, such as pedestrian lighting and business security cameras, into the commercial corridor program.
- 2) Establish a regular schedule for meetings between the police and the community.

Community Services

- 1) Conduct a feasibility study for possible senior center locations and program partners.
- 2) Encourage additional childcare and afterschool options in the community through marketing and connections to available resources for childcare businesses.

Following these recommendations is a ten year timeline for implementation and a list of potential resources to assist in realizing the plan's goals.

The Planning Team & Planning Process

In early 2011, Nicetown CDC initiated the Nicetown Economic Development and Housing Strategy planning process with CDBG support made available by the City of Philadelphia Department of Commerce. Key members of the planning team include:

Majeedah Rashid, Chief Operating Officer, Nicetown CDC
Maisha Jackson, Baker & Company, LLC
Matt Wysong, Northwest Philadelphia Community Planner, Phila. City Planning Commission
Beth Beckett, Senior Vice President, Real Estate Strategies
Susanne Stone, Vice President, Sherick Project Management
Leslie Anastasio, Project Manager, Sherick Project Management

In addition to the planning team, the process was guided by an Advisory Committee charged with reviewing the proposed plan outline and community involvement strategy, providing input on proposed plan goals, and reviewing the draft of the plan before finalization. The Advisory Committee includes the following representation:

Bob Bembry, Office of Councilwoman Bass
Michael Bennett, NTCDC/NAC
Kendra Brooks, NTCDC/NAC
Greg Clennon, Nicetown Business Association
Lucretia Crawford, Program Coordinator-NTCDC (Nicetown Resident)
Sheila Hall, NTCDC/NAC
Pat Jamison, Block Captain Committee of Nicetown
Rojer Kern, Philadelphia Department of Commerce
Richard Mathis, Nicetown Business Association
Joe McFadden, President, NTCDC/NAC
William Parks, Block Captain Committee of Nicetown
Ron Payne, NTCDC/NAC
Dennis Pickeral, Stenton Manor
Charisma Presley, NTCDC/NAC
Zakariyya Abdur Rahman, President/CEO of Nicetown CDC
Laura Seaman, Philadelphia Redevelopment Authority
Shayna Terrell, Mastery Charter School @ Gratz
Gwen White, Block Captain Committee of Nicetown

The planning team held regular meetings from May 2011 through March 2012. The Advisory Committee was convened in November 2011 to review the proposed plan outline and community outreach strategy, and again in March 2012 to review a plan draft.

Community input was sought through Germantown Avenue business and shopper surveys, along with open-ended surveys allowing residents to list any of their concerns and suggestions regarding neighborhood economic development, housing, infrastructure, quality of life and community services.

This plan's recommendations were determined by combining community and advisory committee input with analysis of existing neighborhood conditions and area economic conditions, focusing on aspects where needs, community priorities, and achievable goals coincide. The plan's primary focus is economic improvements on the Germantown Avenue commercial corridor from Broad Street to Windrim Avenue, but it also includes recommendations for housing, infrastructure, quality of life and community services that will maximize and capitalize on economic development goals.

Community Participation

From the start, it was the intention that this planning process be driven by the needs of the community, recognizing that neighborhood business and resident buy-in are critical to successful area revitalization. To ensure this input was comprehensive, Nicetown CDC used a number of methods to engage the community and other stakeholders in this planning process including:

- Establishment of an Advisory Committee
- Open public meetings where community input was gathered
- Germantown Avenue business interviews
- Nicetown resident shopper surveys

Corridor Business Interviews

Since understanding shopper and business perceptions of Nicetown's Germantown Avenue commercial corridor is critical to the plan's primary goal, Nicetown CDC engaged consultant Maisha Jackson of Baker & Company, LLC to gather input from residents and corridor business owners. From March to June 2011, Ms. Jackson conducted extensive outreach to businesses between the 3700 and 4400 blocks of Germantown Avenue, resulting in 23 interviews which represent about 40% of the businesses along the corridor. Key interview results are outlined in the Commercial Analysis section of this plan, and Ms. Jackson's full report on the interviews is included as Appendix A.

Resident Input on the Commercial Corridor

On September 15, 2011, Nicetown CDC convened a community meeting to solicit resident concerns about, and hopes for, their commercial corridor. Flyers for the meeting were distributed through the Nicetown NAC network of block captains, and attracted 70 participants. The meeting was led by Nicetown CDC Chief Operating Officer Majeedah Rashid, and Maisha Jackson presented the Consumer Shopper Survey tool to collect resident



feedback. Sixty-four participants completed the nine question survey at the meeting, and Nicetown NAC staff collected an additional 16 surveys from visitors to the Nicetown Community Center during the week of September 26, 2011. These 80 responses achieved a survey sample that closely reflected the neighborhood's overall age distribution profile. Key survey findings are included in the Commercial Analysis section of this plan, and Ms. Jackson's full report on the surveys is included as Appendix B.

Community Observations & Suggestions

Recognizing that a strong commercial corridor requires a strong neighborhood base and that each foster one another, the plan seeks to provide a comprehensive vision for Nicetown, including goals that will not only encourage economic development, but also provide a housing strategy and recommendations for improvements to public safety, infrastructure and community services. Nicetown CDC solicited resident input on for this broader context through a community survey distributed to residents door to door and to individuals visiting the CDCs offices in February and March 2012. This survey gave residents the opportunity to provide open-ended responses to the issues & opportunities they perceive in their community. A total of 45 surveys were collected.

Similarly, at the November 10, 2011 meeting of the Plan's advisory committee, committee members discussed the issues they believe Nicetown is currently facing, and their vision for improving the community. Community survey responses and advisory committee observations include the following issues and recommendations:

Housing

- There is a need for senior housing and a senior center. Consider a mixed use building to serve both purposes.
- Need a process for addressing vacant, dilapidated properties that owners don't want to fix up or sell.
- There are too many vacant lots on residential streets.
- Community should fix up abandoned houses and resell or lease them

Economic Development

- Neighbors feel businesses are not invested enough in the community; specifically they don't make local hires, don't support the neighborhood.
- Need a wider variety of stores, more shopping options
- Neighborhood could use a dry cleaners, a dollar store, a supermarket, a pharmacy and a bank
- Can consumer data collected in the planning process be used to market to potential businesses?
- Make sure new businesses are diverse, convenient and not already in existence.
- Consumer data shows residents travel 5 miles for food. That is too far and should be addressed.
- Vacant businesses need to be cleaned up and occupied. Challenge is that many are owned by the same real estate company out of New York and it's hard to communicate with them.
- Enhance/expand NT CDC entrepreneur program
- Promote Nicetown as a hub with Wayne Junction train station
- Sidewalks around Wayne Junction station are wide, would be perfect for kiosk/stand/cart businesses
- Develop an internship/volunteer program with neighborhood businesses to build resident skills
- Offer incentives for patrons to shop at local stores

- All operating stores should open their storefronts , not leave their gates down
- Hold business owners accountable for the condition of their property, make sure they clean up in front of their store everyday

Infrastructure

- Streetscape improvements to coincide with Wayne Junction upgrades to include security cameras, sidewalks, lighting, benches and banners.
- Encourage PennDOT to make improvements to Route 1 overpass
- Need more street cleaning

Open Spaces

- Windrim St. corridor is a dumping ground. CSX owns the land that is being dumped on, work with Federal Transportation Administration to address.
- Look for opportunity to develop a community garden
- Encourage PennDOT to develop a skate park beneath the Route 1 overpass
- Nicetown Park should be utilized for more youth activities
- Playground equipment in Nicetown Park needs to be repaired

Safety

- Need more police officers on the streets
- Strengthen Town Watch
- Build connections between community and police officers so that they know each other
- Put cameras on every corner
- Get kids active so they will stay away from drugs and crime
- Need speed bumps to slow down speeders on residential streets
- Need more street lights
- Need more enforcement of curfew laws

Community Services

- Need a senior center. There is no place for seniors to congregate. There are vacant buildings around Wayne Junction and in Stenton Park that are potential sites.
- There is also a need for additional childcare services. Explore the possibility of an intergenerational childcare/senior center like the Sisters of Mercy model in Tioga.
- Need more afterschool program options. Stenton Museum could develop a youth program.
- Neighborhood municipal pool at Germantown Avenue & Staub Street is not in use. Need \$1.2 million in funding to bring it back, or need to develop an alternative use
- Proposed neighborhood skate park should be pursued

Nicetown Today

Existing Conditions Analysis

Area Boundaries

The Nicetown study area is based in the eighth Councilmatic District and includes portions of Census Tracts 201, 203, 204, 205, and 280. It is bounded on the west by Pulaski Avenue to 18th Street to Clarissa Street, then follows Wayne Avenue to Berkley Street around the Wayne Junction Station, returning down Germantown Avenue to Windrim Avenue on the northern end, and then follows Broad Street south to Erie Avenue. Map 1 shows the plan area boundaries.

Brief History

Nicetown was founded around 1700, and remained rural until the mid-1800s when railroad construction allowed industrial and residential development to flourish. Nicetown established itself as an industrial hub with coal, steel, linoleum and other manufacturing plants that employed thousands and supported adjacent residential and commercial development. After World War II, industrial activity began to decline in the area, leading to a loss of businesses, population decline and increased vacancy. Today, Nicetown presents many opportunities for redevelopment and has the access to transportation and proximity to Center City that make it ripe for rejuvenation.

Area Demographics

According to ESRI, a vendor that provides Census and other demographic data for specific market areas, in the year 2000, the study area population was 11,725 and in 2010 it was 10,635 indicating an overall population decline of 9% from 2000 – 2010, whereas the City of Philadelphia as a whole saw a slight population gain of .6% in that timeframe.

The racial composition of the study area is 93% African American, 2.4% white, 0.8% Asian, 0.3% Native American, .1% Native Hawaiian and other Pacific Islander, 2.2% two or more races and 1.3% other race, with 3.7% of the residents of Hispanic origin. Income levels vary from low to moderate, with the 2010 median income at \$28,944, compared with a median income of \$41,221 for Philadelphia as a whole. Sixty percent of area residents own their homes, which is in line with the citywide homeownership rate of 61%.

Economic Conditions

Today, commercial activity is concentrated along portions of Germantown Avenue, and a number of nearby facilities provide employment opportunities to Nicetown residents including Shop-N-Bag

Supermarket, Einstein Hospital, Temple University's main campus and Children's Hospital, LaSalle University, Graz High School and Edward T. Steel Elementary School.

Commercial Corridor Overview

The one-mile long Germantown Avenue commercial corridor extends from Windrim Avenue at Wayne Junction to a five-way intersection at Broad Street and Erie Avenue. The corridor is roughly bisected at the intersection of Hunting Park Avenue: the 3700 through 4000 blocks run south of Hunting Park, while the 4100 through 4400 blocks run north of Hunting Park to Windrim. The commercial corridor includes a mix of uses. Retail and service establishments are concentrated on the 3700 block near Broad Street, the 4100 and 4200 blocks between Staub and St. Paul and the 4400 block close to Wayne Junction. In between the concentrations of retail and service businesses are blocks dominated by either non-retail establishments (4000 block), not-for-profit and single-family residential use (4300 block) or offering a mix of retail/service businesses, significant vacancy, church and non-retail establishment uses (3800 and 3900 blocks).

Most retail and service businesses are located in storefronts on the first floor of older three-story mixed-use buildings. These spaces typically contain 900 to 1,000 square feet. In some cases, two properties have been joined to create a larger storefront space. Observations made during walking and windshield surveys of the corridor suggest that the upper two floors of many buildings are occupied residential units. Retail and service businesses along the corridor typically do not offer dedicated parking. Customers arriving by car park on the street.

Vacant and grated storefronts are an issue throughout the corridor, even on strong blocks. On the 4100 and 4200 blocks of Germantown Avenue, the strongest concentration of retail space in Nicetown, nine vacant storefronts exist alongside 14 operating establishments. Few have signs offering the space for rents. In some cases establishments are grated and out of business, but the establishment signs remain. Throughout the corridor some businesses that are reportedly open leave their storefronts grated during business hours; other buildings appear to be occupied on the first floor, but have no signs.

Area Consumer Spending

Based on Bureau of Labor Statistics Consumer Expenditure Surveys for 2005 and 2006, ESRI estimates that in 2010 the area's population spent approximately \$164 million on goods and services annually in 14 different retail categories including:

Apparel & Services:	\$4,500,232
Computers & Accessories:	\$488,029
Education:	\$3,382,285
Entertainment/Recreation:	\$7,819,079
Food at Home:	\$11,579,955
Food Away from Home:	\$8,296,754
Health Care:	\$9,017,484

Household Furnishings & Equip:	\$4,301,052
Investments:	\$4,046,013
Retail Goods:	\$57,133,682
Shelter:	\$43,399,578
TV/Video/Audio:	\$3,217,996
Travel:	\$4,569,225
Vehicle Maintenance & Repairs:	\$2,276,329
	<u>\$164,027,693</u>

Land Conditions

The study area includes 4,912 parcels over a 320 acre area. The area is primarily zoned residential, with commercial designations focused on Germantown Avenue, Broad Street and Pulaski Avenue, and a few scattered industrial designations. Land use and zoning are shown on Maps 2 and 3. Most of the residential properties in Nicetown are two story row homes that are at least 100 years old. Nicetown Park and Stenton Park provide open space, and the area includes Steel Elementary and Gratz High School.

As shown in Map 4, 11% of the parcels are vacant (68 vacant buildings and 461 vacant lots), presenting both a challenge and a tremendous opportunity for revitalization. Map 5 shows that 168 (approx. 3%) of area parcels are publicly owned, including 87 vacant, non-recreational parcels.

Housing Assessment

According to housing data available through ESRI, there are 4,589 total housing units and 3,735 households in the project area, indicating that almost 19% of available housing units are vacant. Of the occupied housing units, 2,245 (60%) are owner occupied, and 1,490 (40%) are renter occupied. Fifty-nine percent of owner occupied housing units do not have mortgages. The median home value is \$54,724 and the median rent is \$539/month. The vast majority of housing units (78%) are attached single family units (mostly rowhomes). The median home age is 72. Nicetown Court I, which was completed in 2011, represents the first new housing units added to the project area in more than six years.

Transportation

The area holds much promise for redevelopment, in large part due to its proximity to Center City Philadelphia and its high accessibility via all forms of public transportation. Seven SEPTA bus routes serve the area and provide easy access to all parts of the City. The area is also well served by the Broad Street subway line and the Wayne Junction Regional Rail hub, which provides direct access to 12 of 16

regional rail lines, directly connecting Nicetown with most of the Delaware Valley served by regional rail, and ensuring train access to Center City Philadelphia every 15 minutes. Map 6 shows area transit options.

According to information available from SEPTA, average daily Regional Rail ridership from Wayne Junction station includes the following boardings and leaves (disembarkings):

Wayne Junction Station - Average Daily Ridership			
INBOUND			
	BOARDS	LEAVES	ON-BOARD
Weekday	490	130	620
Saturday	235	73	308
Sunday	187	63	250
OUTBOUND			
Weekday	138	390	528
Saturday	68	214	282
Sunday	66	173	239
INBOUND + OUTBOUND			
Weekday	628	520	1148
Saturday	303	287	590
Sunday	253	236	489

Recent Investment

Despite the economic downturn, Nicetown is seeing tremendous investment and growth. Within the last few years, a number of redevelopment projects have gotten off the ground in and around Nicetown representing over \$180 million in area investment and providing the catalyst for additional, significant community revitalization. Projects include:

Nicotown Court I

Developed by Nicetown CDC and Universal Companies, this mixed use building located on the 4300 block of Germantown Avenue was completed in 2011 and provides 37 units of affordable apartments and 3,900 square feet of first floor retail space occupied by a day spa and Temple University Health System. The total value project value is over \$14.6 million.

Nicotown Court II

Another partnership of Nicetown CDC and Universal Companies and The Community Builders, this \$13.2 million project includes development on both sides of the 4400 block of Germantown Avenue to create 50 units of affordable housing and 6,000 square feet of commercial space. Groundbreaking is scheduled to take place in June 2012, and the project is expected to be fully leased up August 2013.

Salvation Army Kroc Center

Completed in November 2010, this \$72 million state of the art recreational facility located at the former Budd Company site on Wissahickon Avenue between Hunting Park and Roberts Avenues is one of the largest, most comprehensive community centers on the east coast. The Center includes a worship and performing arts center, aquatic center, arts and education programs, café, conference and training center, family resource center and fitness and recreation facilities, and currently serves about 7,000 members.

SEPTA Wayne Junction

This extensive three year station renovation project got underway in the Fall of 2011 and will include ADA compliance improvements, upgrades to infrastructure, platform construction, passenger tunnels and stairways, painting the Wayne Avenue bridge, and improvements to passenger amenities for a total investment of \$33 million. It is expected this project will increase station ridership and generate transit oriented development projects around the station.

Bakers Centre

This project involves revitalization of properties left vacant by the relocation of Tasty Baking in 2010 and includes construction of a 220,000 SF shopping complex on vacant 30 acre parcel and adaptive reuse of the former Tasty Baking headquarters for commercial and retail use. The shopping complex will be anchored by a Shop Rite grocery store, eradicating one of the largest Philadelphia ‘food deserts.’ The total project cost is approximately \$53 million.

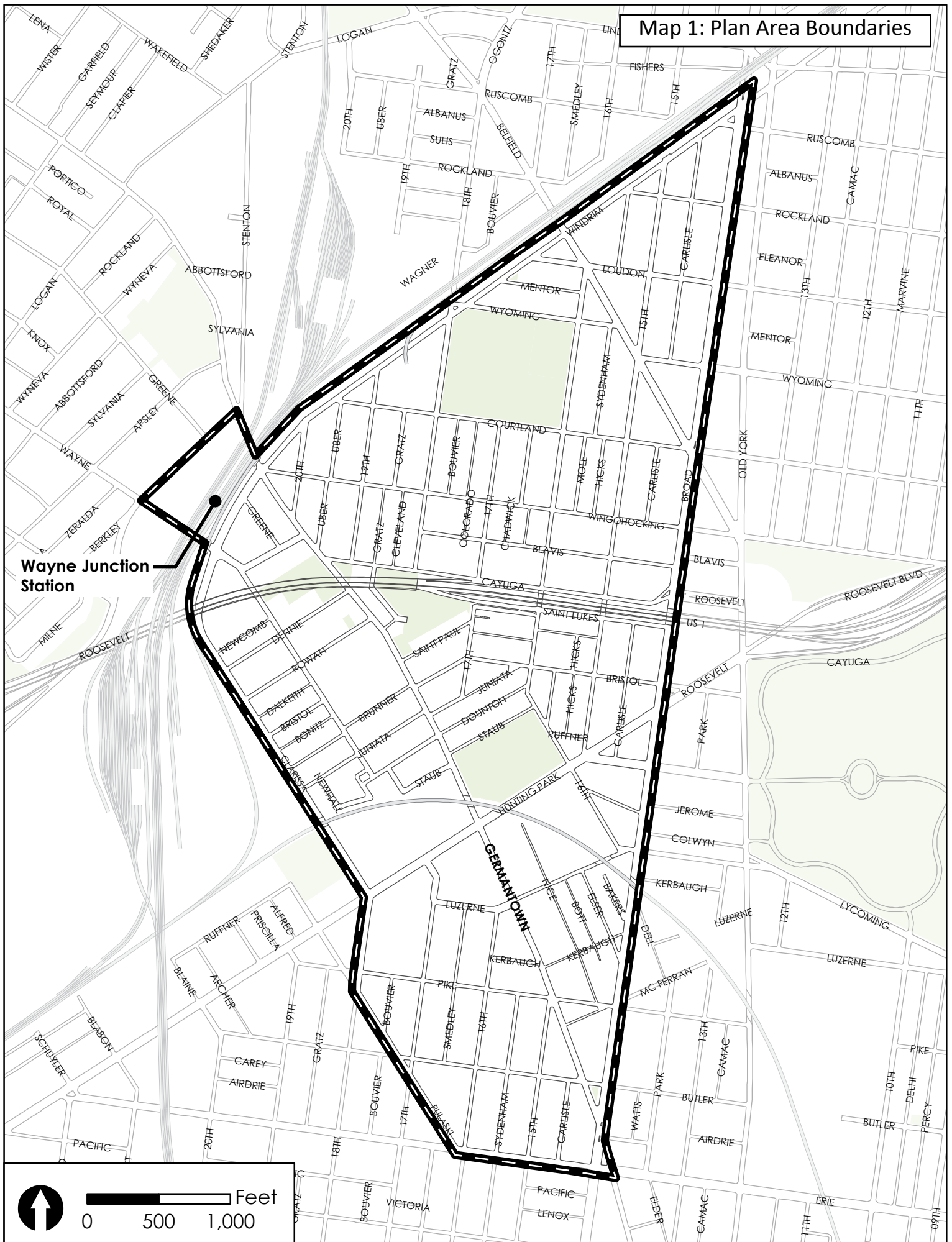
Nicetown Boys and Girls Club

Through a generous donation of \$900,000 from Phillies player Shane Victorino, the Boys and Girls Club of Greater Philadelphia was able to transform its 106 year old Nicetown site from a worn, crumbling structure slated for closing to a state of the art facility for area youth including a new gymnasium, game room, technology center, study lounge and playground.

These investments have created tremendous momentum for the Nicetown community. Now Nicetown must seize the opportunities they have created and ensure its renaissance continues.

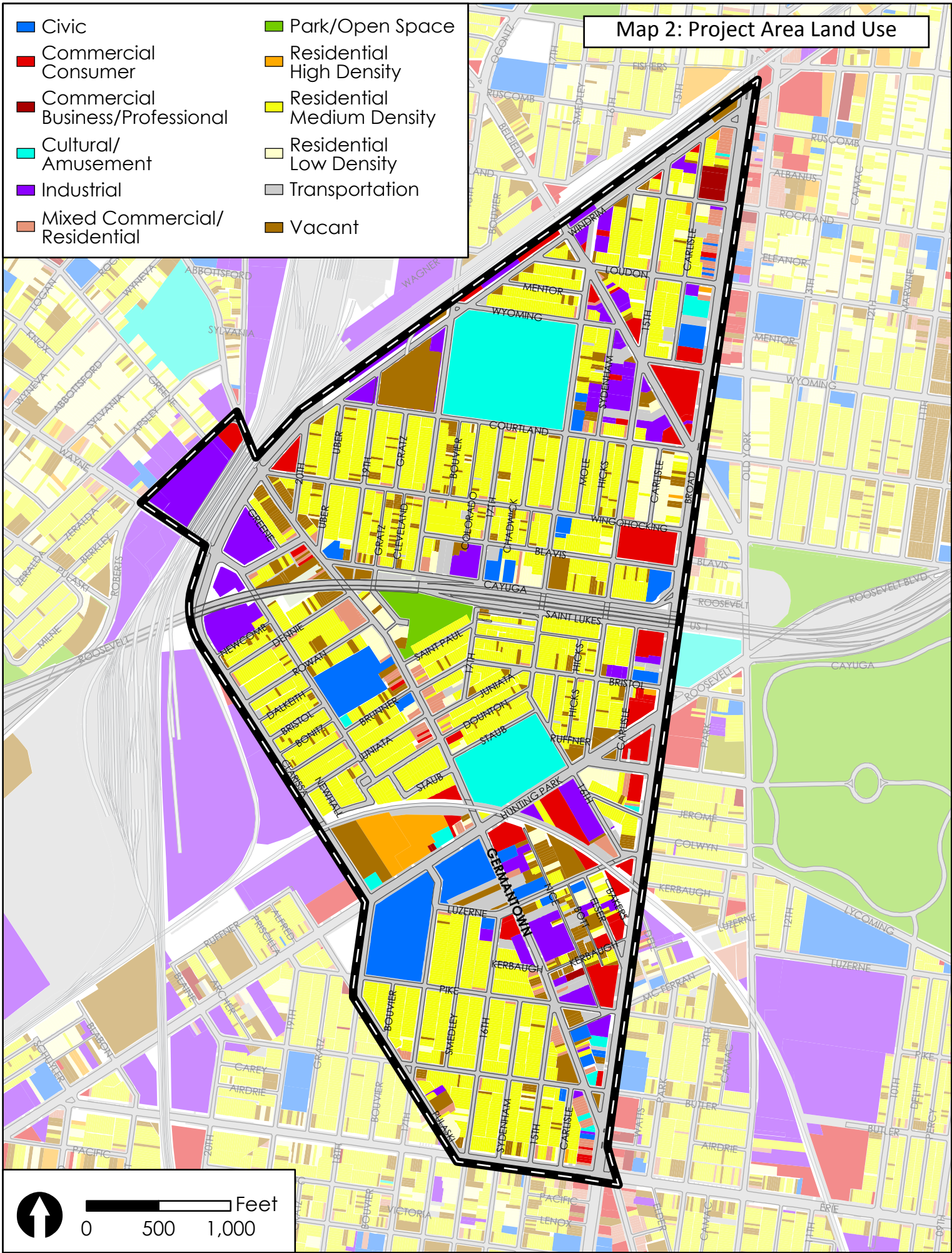
Plan Area Maps

Map 1: Plan Area Boundaries



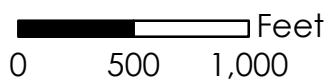
Wayne Junction
Station





Map 3: Project Area Land Zoning

The map displays the land zoning for the project area, which is outlined in black. The map is color-coded by zoning type: yellow for residential (R), orange for commercial (C), green for recreational (REC), and purple for industrial (G). The project area is divided into numerous small lots, each labeled with its zoning code. The map also shows surrounding areas with different zoning codes and a scale bar indicating 0, 500, and 1,000 feet.



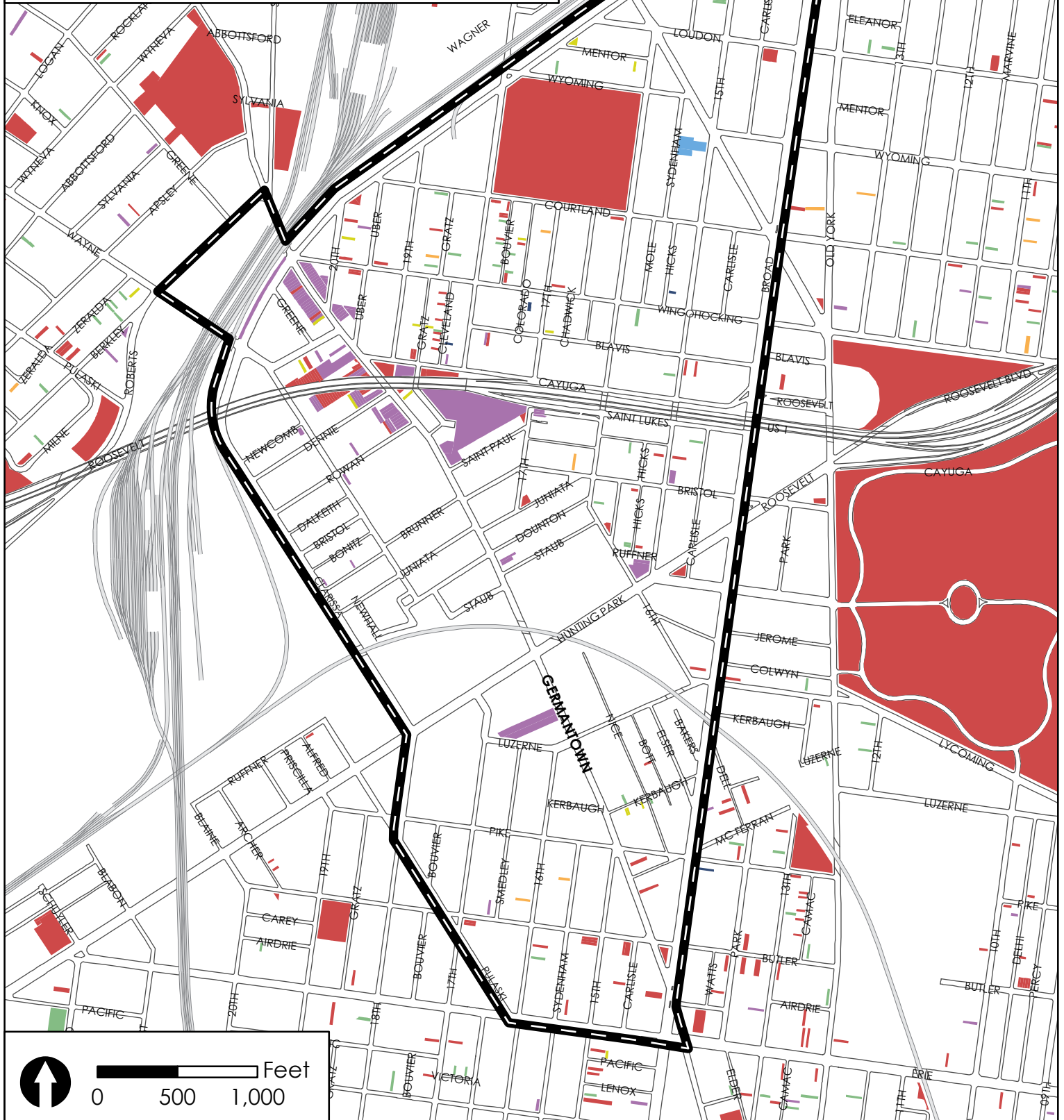
- Vacant Lot
- Vacant Building

Map 4: Project Area Vacant Properties

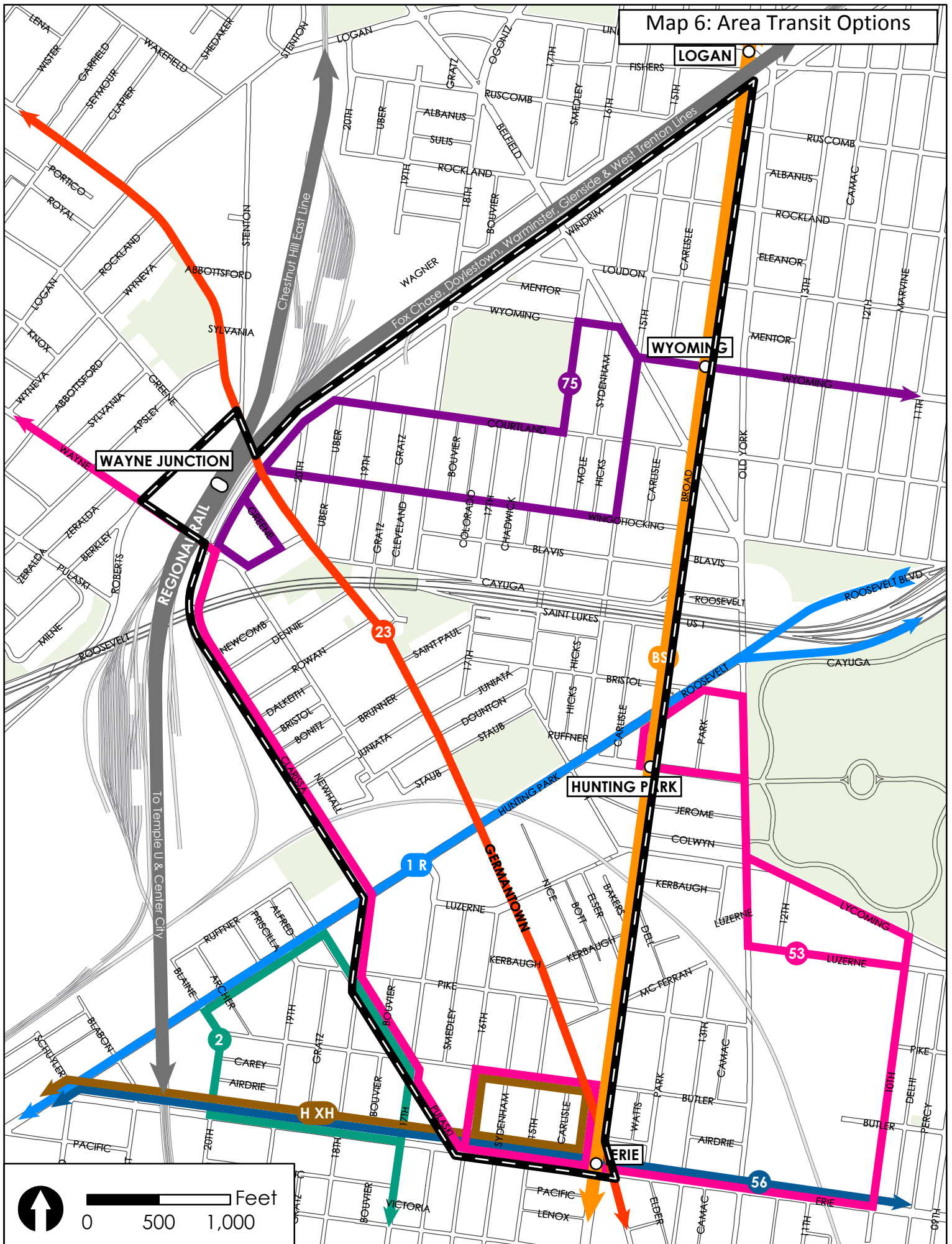


- City of Philadelphia
- US Dept. of Housing & Urban Development (HUD)
- Phila. Housing Development Corp. (PHDC)
- Phila. Housing Authority (PHA)
- Phila. Authority for Industrial Development (PAID)
- Office of the District Attorney
- Philadelphia Redevelopment Authority (RDA)

Map 5: Plan Area Publicly Owned Properties



Map 6: Area Transit Options



Commercial Analysis

Commercial Corridor Overview

The one-mile long Nicetown section of Germantown Avenue commercial corridor extends from Wayne Junction to a five-way intersection at Broad Street and Erie Avenue. The corridor is roughly



bisected at the intersection of Hunting Park Avenue: the 3700 through 4000 blocks run south of Hunting Park, while the 4100 through 4400 blocks run north of Hunting Park to Windrim.

The commercial corridor includes a mix of uses. Retail and service establishments are concentrated on the 3700 block near Broad Street, the 4100 and 4200 blocks between Staub and St. Paul Streets and the 4400 block close to Wayne Junction. In between the concentrations of retail and service businesses are blocks dominated by either non-retail establishments (4000 block), not-for-profit and single-family residential use (4300 block) or a mix of retail/service businesses, significant vacancy, church and non-retail establishment uses (3800 and 3900 blocks).

Most retail and service businesses are located in storefronts on the first floor of older three-story mixed-use buildings. These spaces typically contain 900 to 1,000 square feet. In some cases, two properties have been joined to create a larger storefront space. Observations made during walking and windshield surveys of the corridor suggest that the upper two floors of many buildings are occupied residential units. Retail and service businesses along the corridor typically do not offer dedicated parking. Customers arriving by car park on the street.

Traffic Counts and Bus Ridership

Street conditions along Germantown Avenue—including irregular spacing of cross streets resulting in sometimes unexpected cross traffic, frequent SEPTA bus stops, trolley tracks, and cobbles in the eastern blocks of the corridor—create a challenging driving environment for automobiles. Nevertheless, Germantown Avenue within the corridor has a moderately high level of daily traffic. At Wayne Junction, the intersection of Windrim Avenue and proximity to streets leading to the Route 1 on-ramp result in a higher traffic count than in other parts of the commercial corridor. The table below presents the most recent traffic counts available from the Delaware Valley Regional Planning Commission (DVRPC).

Average Daily Traffic Counts (AADT)

Street	Segment Measured	AADT	Date
Windrim Avenue	Between Germantown Avenue and Wayne Avenue	13,124	July 7, 2010
Germantown Avenue	Between Windrim and Berkley Street	10,858	June 27, 2006
Germantown Avenue	Between Bristol and Rowan Streets	10,063	April 13, 2004
Germantown Avenue	Between Broad Street and Hunting Park Avenue	10,050	March 6, 2007

Source: DVRPC

SEPTA's Route 23 bus travels along Germantown Avenue past corridor business establishments. For the entire route, May 2011 weekday passenger counts on this route averaged 24,262; June 2011 average weekday passenger counts were 21,311. This represents the highest ridership of any city bus route. In conjunction with the automobile traffic counts detailed above, bus ridership offers additional access and demand potential for businesses on the Corridor.

Existing Corridor Businesses by Type

Seventy-nine establishments are located on the corridor. Only businesses with a Germantown Avenue address are included in this count. The distribution of these establishments by type is presented in the table on the following page.

Service businesses represent more than 35 percent of corridor establishments and include a fairly broad offering of service types. This category is dominated by barber/beauty shops and child day care businesses, a typical pattern in neighborhoods with low to moderate household income levels.

The 15 retail and wholesale (open to the public) establishments in the corridor represent 19 percent of the total, and are more limited in range, with few shoppers goods (clothing, furniture, books, etc.) available to neighborhood shoppers. Two small grocery stores—one more of a corner convenience store—are located on Germantown Avenue. The area is served by the Shop-N-Bag supermarket at Broad and Wingohocking Streets.

Restaurants and bars account for another 25 percent of establishments in the corridor. Most are take-out establishments; however, several offer in-restaurant dining. A new nightclub, Club Bleu, recently opened in the 4200 block of Germantown Avenue and appears to be a more upscale offering in this category.

Ten churches and the Nicetown CDC are located on Germantown Avenue as well as five skilled trade and other non-retail businesses.

GERMANTOWN AVENUE ESTABLISHMENTS, BY TYPE

Eating and Drinking Places (n=20, 25.3%)

Full and limited service restaurants	13
Bars and lounges	7

Service Establishments (n=28, 35.4%)

Beauty, nails and barber shops	10
Laundromat	2
Dry cleaner	1
Shoe repair	1
Bank	1
Child day care	5
Health Center/physician's office	2
Real estate office	1
Auto repair	3
Banquet hall	1
Post office	1

Retail/Wholesale Establishments (n=15, 19.0%)

Grocery store	2
Drug store	1
Discount department/variety store	1
Hardware store	1
Computer sales/service	1
Resale/thrift store	1
Gift/novelty store	1
Newsstand	1
Wholesale	3
Tire store	1
Gas station	1
Cell phone store	1

Not for Profit Organizations (n=11, 13.9%)

Churches/religious organizations	10
Community development corporation	1

Other Businesses (n=5, 6.3%)

Plumber	1
Roofer	1
Trucking	1
Recycling/salvage	1
Security system sales/service	1

TOTAL ESTABLISHMENTS	79
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Employment in the Study Area and at Corridor Businesses

According to business data provided by Claritas and InfoUSA, more than 1,500 people work in the Nicetown study area overall. Of these, approximately 260 persons work for businesses located along the Germantown Avenue commercial corridor.

Vacancy

Vacant and security-grated storefronts are an issue throughout the corridor, even on strong blocks. The vacancy rate is estimated to be approximately 40 percent. On the 4100 and 4200 blocks of Germantown Avenue, the strongest concentration of retail space in Nicetown, seven vacant storefronts exist alongside 16 operating establishments. Few have signs offering the space for rent. In some cases

establishments are gated and out of business, but the establishment signs remain. Throughout the corridor some businesses that are reportedly open leave their storefronts grated during business hours; other buildings appear to be occupied on the first floor, but have no signs identifying the establishment or activity.



Grated businesses on the 4200 block of Germantown Avenue

Current Nicetown CDC Business Development Initiatives

The Nicetown CDC employs a part-time Corridor Manager who is responsible for facilitating communications with Corridor businesses and acting as a liaison with City programs that can assist business owners in maintaining or expanding their establishments. The Corridor Manager indicates that the following programs are currently available to assist businesses in the Corridor:

- Storefront (façade) improvement assistance
- Greenworks Loans for energy efficiency improvements
- Merchants Fund support—business stabilization and crisis grants and loan matching.

The Nicetown CDC provides merchants with assistance in completing applications for these programs.

The Nicetown CDC is currently developing a Business, Arts and Cultural Center in an existing two-story structure at 4159-63 Germantown Avenue. This facility will offer eight incubator spaces, business services such as copy and publishing equipment, computers, a 700 square foot meeting room and offices for service intake and a business manager. The facility will also include a 1,500 square foot

art/dance studio at the rear of the building and two apartments on the upper level. The Business, Arts and Cultural Center will complement the existing Nicetown CDC Community Center at 4300 Germantown Avenue and is being developed to help stabilize and grow existing businesses, and attract new businesses and entrepreneurs. The facility will also focus on year-round facilitation of the annual Give Back Festival.

The Nicetown CDC, in conjunction with Universal Companies, has two mixed-use development projects that will add modern street-level commercial space to the corridor. Nicetown Court I, located on the 4300 block of Germantown Avenue, includes 37 affordable general occupancy apartments and 3,900 square feet of retail space. The residential units are 100 percent leased, and the Nicetown CDC has master-leased the commercial component and subleased 2,200 square feet to Temple Physicians Inc. for a family practice physician's office. The balance of the space is occupied by Transformations Salon & Spa, owned and managed by the Nicetown CDC.

The Nicetown CDC has also received Neighborhood Stabilization Program (NSP) funding and an allocation of Low Income Housing Tax Credits for Nicetown Court II, 50 affordable rental homes and 6,000 sq. ft. of transit-oriented commercial/retail space to be developed on either side of Germantown Avenue in the 4400 block at Windrim Avenue. Site assembly for this development necessitated acquisition of an operating business on this block—Sister Muhammed's Kitchen. The Nicetown CDC hopes to relocate this restaurant to the new commercial space, however the business owner had owned the acquired building; moving into rented space may not be financially feasible. The Nicetown CDC has developed plans to establish a 1,500 sq ft. restaurant- with an updated "Geno's steaks" theme, and has also received inquiries from a dollar store, but has not begun actively seeking commercial tenants for the new buildings. Groundbreaking is scheduled for June 2012, with a 14-month construction schedule. Lease up is slated to take place from January – June 2013.

Other Commercial Development

In addition to the efforts of the Nicetown CDC, two development initiatives, both approximately 1 mile from the plan area, will impact the Nicetown community:

- Bakers Centre, a 220,000 square foot community shopping center at West Hunting Park Avenue and Fox Street, will include a new 71,000-square foot Brown's Shop-Rite grocery store. Groundbreaking took place in March 2011. This center will expand the selection and quality of goods—particularly fresh foods—available to Nicetown residents, although most would need to access the center by car or bus. The Germantown Avenue corridor will continue to offer convenient pedestrian-oriented shopping for nearby residents.
- The Salvation Army's Kroc Center, a recently opened 130,000-square foot comprehensive community and recreational center located at 4200 Wissahickon Avenue.

Business Survey Results

Between March and June 2011, Maisha Jackson of Baker & Company LLC conducted interviews with a sample of 23 businesses that was representative of the types of establishments located in the corridor. The survey results are included in Appendix A. The following are key findings:

- All of the businesses surveyed were independent, single location establishments; none was part of a chain.
- Thirteen businesses own their buildings, while ten rent their space.
- Almost 40 percent of businesses surveyed have been located in the Corridor less than five years. The remaining establishments have operated on this part of Germantown Avenue from between six years to nearly 30 years.
- The businesses generally do not have many employees. One third of the sample had three to five full-time employees. Another third operates with one or two full-time employees. The remaining businesses are staffed only by part-time employees.
- While businesses generally draw the majority of their customers from either a ½ mile radius or the “rest of North Philadelphia”, the majority of businesses report getting at least some customers from “elsewhere in Philadelphia” or “outside the City”.
- Customers travel to businesses in the Corridor by a number of modes—public transportation, car, and on foot.
- Two thirds of businesses reported that their sales over the past year are “keeping up with inflation”, while twenty percent reported declining sales. Three businesses reported increased sales.
- Nearly half of the businesses surveyed indicated that they are interested in expanding over the next 24 months. The remainder anticipate staying “as is”.
- Most businesses rely on street parking for both customers and employees. While a majority of businesses reported that parking is currently adequate for their customers, nearly 40 percent of respondents indicated that parking is an issue for their business.

When asked what types of economic development activities would help to improve their businesses, the most frequently mentioned items were related to corridor maintenance and business development support. The table below summarizes the responses:

Activity	Respondents
Improved maintenance and cleanliness	15
Access to financing	13
Support and advice on strengthening business	13

management and improving profitability	
Coordinated promotional activities	13
Addition of complementary businesses and services	12
Information and funding to improve energy efficiency/reduce utility costs	12
Better police patrols/response time	11
Streetscape improvements	11
Better street signage	10
Affordable façade improvement program	9
More parking	6

Source: Maisha Jackson/Nicotown CDC 2011 Business Survey

Shopper Survey Results

In addition to the business survey, Maisha Jackson completed a shopper survey on behalf of the Nicetown CDC. Responses were collected from a sample of 80 respondents.

- More than two thirds (62 percent) of respondents report they regularly shop, visit or do business on Germantown Avenue.
- Most respondents (42 percent) usually walk to Germantown Avenue. Roughly equal numbers drive or take public transportation (30 percent drive, 27 percent public transit).
- Residents generally feel safe on the commercial corridor during daylight hours.
- Commercial corridor businesses are used by area residents for limited convenience goods and services purchases.
- Residents would like to see the commercial corridor reshaped to create a welcoming and entertaining town center that offers healthful recreation, socialization and shopping opportunities.
- Residents are not interested in increasing alcohol sales in the community.
- Most Nicetown residents travel more than five miles to purchase retail goods. Several respondents provided comments indicating that they travel to shop in order to take advantage of sales, find more reasonable prices, and have access to a broader selection of merchandise.

A full report on the survey results is included as Appendix B.

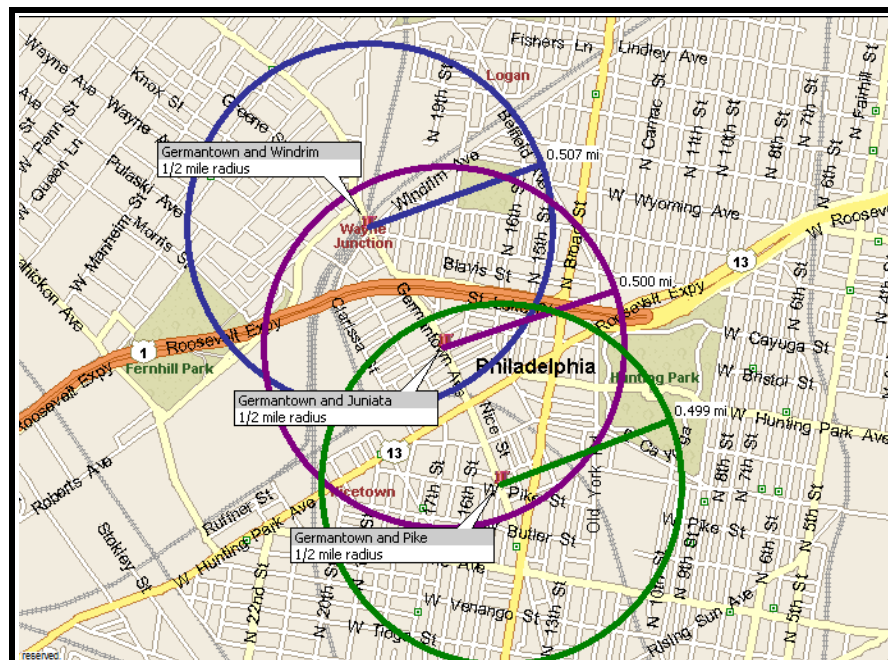
Retail and Service Establishments with Market Support

The shopper survey provides input on the type of businesses residents would like to see added to the commercial corridor. To further evaluate the types of stores and service establishments that would have market support, but are missing from the current mix in the Nicetown portion of the Germantown Avenue commercial corridor, the following factors must be considered:

- The physical characteristics of the corridor and real estate
- The demographic and economic characteristics of the trade area population
- The spending potential of the trade area population and the current leakage of spending out of the trade area
- Existing stores and services present in the corridor
- The additional demand that could be generated by households living outside the trade area including employees of local businesses and individuals who travel through on public transportation

The Germantown Avenue commercial corridor has several distinct retail/service sub-areas along its one-mile length, and specific business types may be more appropriate to one sub-area than another. In dense pedestrian-oriented urban neighborhoods such as Nicetown, the primary retail trade area is typically defined to include a 0.5-mile radius. The map below shows half-mile trade area boundaries drawn around intersections at Windrim Avenue (Wayne Junction), Juniata Street (the heart of the 4100/4200 block commercial area) and Pike Street (the heart of the 3800/3900 block commercial area). As shown, these trade areas overlap.

Half-mile Trade Areas for Selected Points along the Germantown Avenue Commercial Corridor



Data on population and income levels in the three trade areas indicate the area around Germantown Avenue and Pike Street has somewhat higher population density than the other two corridor sub-areas, while the Wayne Junction (Germantown and Windrim Avenues) trade area has relatively higher income levels. Overall, households in the trade areas served by the Germantown Avenue corridor have

relatively low incomes when compared to the City as a whole. The 2010 median household income for Philadelphia was \$41,221 while the average household income was \$51,929.

Selected Trade Area Economic and Demographic Characteristics

	1/2 - Mile Radius Trade Area Germantown Avenue and:			
	Windrim Ave.	Juniata St.	Pike St.	Philadelphia
2010 Population	12,341	11,029	12,722	1,526,006
2010 Households	4,625	5,070	5,125	599,736
Per Capita Income (2010 est.)	\$16,613	\$15,989	\$15,484	\$20,987
Median HH Income (2010 est.)	\$34,635	\$32,420	\$29,809	\$41,221
Median HH Disposable Income (2010 est.)	\$28,012	\$26,339	\$24,541	\$32,787
Average HH Income (2010 est.)	\$46,444	\$42,673	\$39,748	\$51,929
Average HH Disposable Income (2010 est.)	\$37,678	\$35,076	\$32,985	\$42,716

Sources: Population and household data: 2010 Census. Income data: ESRI estimates.

The leakage analyses below look at expenditure potential generated by trade area households that is not served within the trade area. An identified gap (spending leaking out of the trade area) can be evaluated based on the following:

- What percentage of the leaking expenditures could reasonably be captured by additional establishments in the trade area? In most retail categories this percentage is substantially lower than 100%. For example, clothing stores within the trade area may only be able to capture 5 to 10 percent of the expenditures leaking out of the trade area, because individuals typically shop for clothing in a variety of locations. Grocery stores and pharmacies typically capture a much higher percentage of the expenditure potential within a trade area.
- Would the “capturable” proportion of expenditure potential be adequate to support a typically sized establishment in that store category? As a very general rule, retailers need to be able to achieve annual sales per square foot at least ten times the rent paid for street retail space.
- A survey of the limited street retail listings for the 19140 and 19144 zip codes posted on Loopnet.com suggests that annual rents for existing small storefronts are in the \$12.00 to \$15.00 per square foot range. Asking rents for rehabilitated space in the Germantown business district and at Broad and Erie are in the \$18.00 to \$20.00 range, although there are no listings of this type in the study area at this time. Ideally, annual rent should not exceed

10 percent of annual sales per square foot. This information suggests that sales of at least \$150 to \$200 per square foot are required to support businesses in existing space. For newly constructed space rents would be significantly higher, particularly if development costs are not subsidized.

Wayne Junction (Germantown and Windrim Avenues)

The leakage analysis for Germantown and Windrim Avenues shows significant expenditure leakage in several categories where it would be reasonable to be able to capture a portion of the spending within the trade area. The categories include grocery stores; health and personal care stores (drug stores), general merchandise stores (dollar or discount stores) and food and beverage establishments. Although the clothing category also shows significant leakage, as indicated in the shopper survey, residents tend to purchase clothing in many establishments, both for variety and to obtain the best price. It is unlikely that enough spending could be recaptured in the trade area to support a store.

Wayne Junction is a multi-modal transit hub served by multiple regional rail and bus lines. SEPTA data indicate that annual ridership on all modes at Wayne Junction totals 190,500. Bus riders and rail riders beginning or ending their trip at Wayne Junction could generate demand for transit oriented goods and services. Riders residing outside the trade area (for example, those who park and ride at Wayne Junction) represent a source of incremental demand, above and beyond trade area households, which could be enhanced by providing a dedicated park and ride lot.

Transit-oriented retail includes stores and services individuals are likely to patronize at the beginning or end of a workday commute. Stores can include those offering groceries and produce as well as prepared food, and restaurants, coffee shops, and newsstands. A uniform store may be an appropriate type of destination retail. Services such as child care, personal care (hair and nail), dry cleaners and doctors and dentist offices also find transit-oriented locations attractive. The new street retail space being developed in Nicetown Court II would be appropriate for any of these TOD uses.

The “special food services” category shown in the leakage analysis includes grocery and prepared food vending from motorized and non-motorized carts. That type of food vending may be appropriate in this location, particularly during commuting hours.

As indicated in the 2009 Germantown-Nicotown Transit-Oriented Development Neighborhood Plan, the triangular site bounded by Windrim Avenue, Wingohocking and 20th Streets, offer the potential for development of either a chain pharmacy or convenience/food market store such as a Wawa that would serve both commuters and trade area residents. While the new Shop-Rite at Baker’s Centre will undoubtedly capture a significant portion of grocery demand from the Nicetown neighborhood, there will still be demand for fresh produce and convenience groceries along the corridor.

Retail Spending Leakage Analysis

Germantown and Windrim Avenues: ½ Mile Trade Area

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$73,958,293	\$26,214,035	\$47,744,258
Total Retail Trade (NAICS 44-45)	\$62,375,736	\$21,974,885	\$40,400,851
Total Food & Drink (NAICS 722)	\$11,582,557	\$4,239,150	\$7,343,407

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
Motor Vehicle & Parts Dealers (NAICS 441)	\$12,604,341	\$1,737,762	\$10,866,579
Furniture & Home Furnishings Stores (NAICS 442)	\$2,153,054	\$191,025	\$1,962,029
Furniture Stores (NAICS 4421)	\$1,331,348	\$0	\$1,331,348
Home Furnishings Stores (NAICS 4422)	\$821,706	\$191,025	\$630,681
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$1,463,181	\$0	\$1,463,181
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$2,239,204	\$900,988	\$1,338,216
Building Material and Supplies Dealers (NAICS 4441)	\$2,213,356	\$900,988	\$1,312,368
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$25,848	\$0	\$25,848
Food & Beverage Stores (NAICS 445)	\$13,861,343	\$8,008,151	\$5,853,192
Grocery Stores (NAICS 4451)	\$12,253,876	\$7,727,711	\$4,526,165
Specialty Food Stores (NAICS 4452)	\$769,410	\$280,440	\$488,970
Beer, Wine, and Liquor Stores (NAICS 4453)	\$838,057	\$0	\$838,057
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$2,387,027	\$184,614	\$2,202,413
Gasoline Stations (NAICS 447/NAICS 4471)	\$9,379,049	\$6,163,347	\$3,215,702
Clothing and Clothing Accessories Stores (NAICS 448)	\$3,449,949	\$1,033,433	\$2,416,516
Clothing Stores (NAICS 4481)	\$2,828,294	\$988,154	\$1,840,140
Shoe Stores (NAICS 4482)	\$406,198	\$11,742	\$394,456
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$215,457	\$33,537	\$181,920
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$682,002	\$79,876	\$602,126
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$355,899	\$79,876	\$276,023
Book, Periodical, and Music Stores (NAICS 4512)	\$326,103	\$0	\$326,103
General Merchandise Stores (NAICS 452)	\$7,957,795	\$2,334,519	\$5,623,276
Department Stores Excluding Leased Depts. (NAICS 4521)	\$2,367,958	\$97,366	\$2,270,592
Other General Merchandise Stores (NAICS 4529)	\$5,589,837	\$2,237,153	\$3,352,684
Miscellaneous Store Retailers (NAICS 453)	\$1,138,699	\$283,531	\$855,168
Florists (NAICS 4531)	\$123,898	\$0	\$123,898
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$376,262	\$69,674	\$306,588
Used Merchandise Stores (NAICS 4533)	\$32,811	\$83,487	-\$50,676
Other Miscellaneous Store Retailers (NAICS 4539)	\$605,728	\$130,370	\$475,358
Nonstore Retailers (NAICS 454)	\$5,060,092	\$1,057,639	\$4,002,453
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$3,434,539	\$0	\$3,434,539
Vending Machine Operators (NAICS 4542)	\$157,161	\$0	\$157,161
Direct Selling Establishments (NAICS 4543)	\$1,468,392	\$1,057,639	\$410,753
Food Services & Drinking Places (NAICS 722)	\$11,582,557	\$4,239,150	\$7,343,407
Full-Service Restaurants (NAICS 7221)	\$6,559,767	\$3,255,407	\$3,304,360
Limited-Service Eating Places (NAICS 7222)	\$3,259,585	\$466,312	\$2,793,273
Special Food Services (NAICS 7223)	\$1,336,004	\$0	\$1,336,004
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$427,201	\$517,431	-\$90,230

Sources: ESRI; InfoGroup

Retail Spending Leakage Analysis

Germantown Avenue and Juniata Street: ½ Mile Trade Area

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$63,207,096	\$66,289,042	-\$3,081,946
Total Retail Trade (NAICS 44-45)	\$53,322,740	\$56,413,522	-\$3,090,782
Total Food & Drink (NAICS 722)	\$9,884,356	\$9,875,520	\$8,836

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
Motor Vehicle & Parts Dealers (NAICS 441)	\$10,788,377	\$15,540,866	-\$4,752,489
Furniture & Home Furnishings Stores (NAICS 442)	\$1,827,220	\$1,110,126	\$717,094
Furniture Stores (NAICS 4421)	\$1,129,961	\$265,137	\$864,824
Home Furnishings Stores (NAICS 4422)	\$697,259	\$844,989	-\$147,730
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$1,250,070	\$0	\$1,250,070
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$1,883,007	\$219,471	\$1,663,536
Building Material and Supplies Dealers (NAICS 4441)	\$1,861,177	\$219,471	\$1,641,706
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$21,830	\$0	\$21,830
Food & Beverage Stores (NAICS 445)	\$11,889,404	\$13,234,672	-\$1,345,268
Grocery Stores (NAICS 4451)	\$10,511,120	\$12,905,024	-\$2,393,904
Specialty Food Stores (NAICS 4452)	\$659,509	\$329,648	\$329,861
Beer, Wine, and Liquor Stores (NAICS 4453)	\$718,775	\$0	\$718,775
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$2,054,029	\$5,032,209	-\$2,978,180
Gasoline Stations (NAICS 447/NAICS 4471)	\$8,028,715	\$18,409,225	-\$10,380,510
Clothing and Clothing Accessories Stores (NAICS 448)	\$2,936,949	\$294,264	\$2,642,685
Clothing Stores (NAICS 4481)	\$2,407,252	\$181,157	\$2,226,095
Shoe Stores (NAICS 4482)	\$347,208	\$80,186	\$267,022
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$182,489	\$32,921	\$149,568
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$584,308	\$251,139	\$333,169
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$303,621	\$205,014	\$98,607
Book, Periodical, and Music Stores (NAICS 4512)	\$280,687	\$46,125	\$234,562
General Merchandise Stores (NAICS 452)	\$6,805,161	\$1,961,367	\$4,843,794
Department Stores Excluding Leased Depts. (NAICS 4521)	\$2,019,576	\$97,366	\$1,922,210
Other General Merchandise Stores (NAICS 4529)	\$4,785,585	\$1,864,001	\$2,921,584
Miscellaneous Store Retailers (NAICS 453)	\$971,232	\$360,183	\$611,049
Florists (NAICS 4531)	\$104,586	\$13,159	\$91,427
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$321,611	\$105,453	\$216,158
Used Merchandise Stores (NAICS 4533)	\$28,045	\$128,902	-\$100,857
Other Miscellaneous Store Retailers (NAICS 4539)	\$516,990	\$112,669	\$404,321
Nonstore Retailers (NAICS 454)	\$4,304,268	\$0	\$4,304,268
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$2,944,387	\$0	\$2,944,387
Vending Machine Operators (NAICS 4542)	\$134,793	\$0	\$134,793
Direct Selling Establishments (NAICS 4543)	\$1,225,088	\$0	\$1,225,088
Food Services & Drinking Places (NAICS 722)	\$9,884,356	\$9,875,520	\$8,836
Full-Service Restaurants (NAICS 7221)	\$5,596,269	\$5,031,873	\$564,396
Limited-Service Eating Places (NAICS 7222)	\$2,782,027	\$3,915,337	-\$1,133,310
Special Food Services (NAICS 7223)	\$1,140,167	\$0	\$1,140,167
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$365,893	\$928,310	-\$562,417

Sources: ESRI; InfoGroup

Germantown Avenue and Juniata Street:

The section of the commercial corridor surrounding Germantown and Juniata is the strongest node of existing businesses. The leakage analysis below shows that the trade area brings in spending in a number of categories (indicated in red), above and beyond the demand generated by trade area residents.

The leakage analysis suggests opportunities to add a general merchandise store (dollar store or other discount store) to the mix. Spending leakage in the hardware category indicates the potential for the existing hardware store to expand its offerings. Because this is the only hardware store in this part of North Philadelphia, it draws from a wider trade area than the 0.5 mile radius analyzed. Proximity to the hardware store also will continue to make this part of the corridor an attractive location for skilled tradespeople such as plumbers, heating and cooling contractors, painters and roofers.

Like Wayne Junction, this part of the corridor shows potential for food vending from carts.

Germantown Avenue and Pike Street:

Commercial activity in the lower part of the corridor—the trade area surrounding Germantown and Pike—is split between auto-related retail and services in the vicinity of Hunting Park and Germantown and a large aggregation of retail establishments at Broad and Erie. The leakage analysis indicates that establishments in this trade area attract a significant amount of outside spending. The aggregation of auto related-uses and relative ease of driving along Hunting Park Avenue attract customers looking for a variety of auto repair services and parts dealers.

The Broad Street Subway stop at Erie Avenue, and Broad Street bus and vehicle traffic, attract demand to Broad and Erie from customers living well outside the trade area. When a number of retail businesses cluster together, they create a gravity effect, drawing more shoppers from a broader area because of the convenience of a greater selection and the ability to comparison shop.

The 3700 and 3800 blocks of Germantown Avenue can benefit from the gravity effect generated at Broad and Erie, if the CDC focuses on filling vacancies visible from Broad Street, within walking distance from the subway stop. Tenant options could include a range of service providers as well as restaurants. (Restaurants were identified in the PCPC Broad & Erie Plan as a preferred use.) This could also be an appropriate location for a credit union or additional facilities associated with Temple University Health System.

Retail Spending Leakage Analysis

Germantown Avenue and Pike Street: ½ Mile Trade Area

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$70,908,648	\$91,365,352	-\$20,456,704
Total Retail Trade (NAICS 44-45)	\$59,909,806	\$71,906,289	-\$11,996,483
Total Food & Drink (NAICS 722)	\$10,998,842	\$19,459,063	-\$8,460,221

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
Motor Vehicle & Parts Dealers (NAICS 441)	\$12,251,141	\$15,618,746	-\$3,367,605
Furniture & Home Furnishings Stores (NAICS 442)	\$2,031,103	\$1,296,252	\$734,851
Furniture Stores (NAICS 4421)	\$1,257,099	\$265,137	\$991,962
Home Furnishings Stores (NAICS 4422)	\$774,004	\$1,031,115	-\$257,111
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$1,403,165	\$0	\$1,403,165
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$2,070,411	\$256,001	\$1,814,410
Building Material and Supplies Dealers (NAICS 4441)	\$2,046,023	\$256,001	\$1,790,022
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$24,388	\$0	\$24,388
Food & Beverage Stores (NAICS 445)	\$13,315,255	\$12,113,997	\$1,201,258
Grocery Stores (NAICS 4451)	\$11,776,445	\$11,902,094	-\$125,649
Specialty Food Stores (NAICS 4452)	\$737,800	\$211,903	\$525,897
Beer, Wine, and Liquor Stores (NAICS 4453)	\$801,010	\$0	\$801,010
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$2,327,950	\$6,091,729	-\$3,763,779
Gasoline Stations (NAICS 447/NAICS 4471)	\$9,112,163	\$15,146,273	-\$6,034,110
Clothing and Clothing Accessories Stores (NAICS 448)	\$3,260,895	\$4,280,536	-\$1,019,641
Clothing Stores (NAICS 4481)	\$2,673,195	\$2,420,166	\$253,029
Shoe Stores (NAICS 4482)	\$387,535	\$1,497,052	-\$1,109,517
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$200,165	\$363,318	-\$163,153
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$653,930	\$476,528	\$177,402
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$340,026	\$266,968	\$73,058
Book, Periodical, and Music Stores (NAICS 4512)	\$313,904	\$209,560	\$104,344
General Merchandise Stores (NAICS 452)	\$7,621,497	\$15,978,979	-\$8,357,482
Department Stores Excluding Leased Depts. (NAICS 4521)	\$2,255,657	\$145,249	\$2,110,408
Other General Merchandise Stores (NAICS 4529)	\$5,365,840	\$15,833,730	-\$10,467,890
Miscellaneous Store Retailers (NAICS 453)	\$1,088,382	\$293,033	\$795,349
Florists (NAICS 4531)	\$116,859	\$13,159	\$103,700
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$358,954	\$115,904	\$243,050
Used Merchandise Stores (NAICS 4533)	\$31,229	\$128,902	-\$97,673
Other Miscellaneous Store Retailers (NAICS 4539)	\$581,340	\$35,068	\$546,272
Nonstore Retailers (NAICS 454)	\$4,773,914	\$354,215	\$4,419,699
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$3,307,120	\$0	\$3,307,120
Vending Machine Operators (NAICS 4542)	\$150,886	\$354,215	-\$203,329
Direct Selling Establishments (NAICS 4543)	\$1,315,908	\$0	\$1,315,908
Food Services & Drinking Places (NAICS 722)	\$10,998,842	\$19,459,063	-\$8,460,221
Full-Service Restaurants (NAICS 7221)	\$6,222,562	\$11,288,406	-\$5,065,844
Limited-Service Eating Places (NAICS 7222)	\$3,100,001	\$6,294,510	-\$3,194,509
Special Food Services (NAICS 7223)	\$1,270,325	\$249,524	\$1,020,801
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$405,954	\$1,626,623	-\$1,220,669

Sources: ESRI; InfoGroup

Commercial Corridor SWOT Analysis

The data collected on existing businesses within the corridor, the available inventory and condition of commercial space, and the level of demand for goods and services generated with the surrounding trade area suggests strengths, weaknesses, opportunities and threats (SWOT) affecting the potential for the ongoing revitalization of the Germantown Avenue Corridor in Nicetown . These factors are summarized below:

	Helpful	Harmful
Internal	Strengths <ul style="list-style-type: none"> Well defined, densely populated neighborhood organized around commercial corridor. Neighborhood offers opportunity to live in affordable homes with good access to transit, neighborhood shopping and recreational opportunities Active and effective CDC Good transit service Both traditional retail and auto served retail locations Close proximity to major employers Two new construction retail projects Some long-term businesses on corridor. Fewer absentee owners than many corridors. 	Weaknesses <ul style="list-style-type: none"> Low-moderate incomes limit purchasing power for discretionary items. Train switching facilities and viaduct divide and limit trade area and visibility of corridor from northwest Vacancies on commercial strip Small, functionally obsolete storefronts Street condition poor in lower blocks; cleanliness identified as an issue throughout the corridor Public safety issues, both real and perceived. Some merchants feel threatened by young customers. Route 1 overpass creates unprotected/unmaintained areas
External	Opportunities <ul style="list-style-type: none"> Improvements at Wayne Junction offer renewed TOD opportunity New mixed use buildings will create modern retail store spaces Support businesses of all types with incubator services Organize corridor maintenance and promotion activities Utilize open spaces on corridor for vendor businesses to build future storefront tenants Assist existing businesses to improve appearance and energy efficiency of space Wayne Junction offers the opportunity to capture multiple sources of demand: area residents, transit riders and automobile traffic 	Threats <ul style="list-style-type: none"> Increase in crime or well-publicized incident will turn perception of corridor. Further budget cuts at Temple University and the Temple University Health System (TUHS) could lead to job losses that impact Nicetown. Improvements at Broad and Erie and Bakers Square could draw expenditures away from Germantown Avenue.

With the SWOT analysis as a guide, the revitalization efforts already underway at Wayne Junction stations & Nicetown Courts I & II as a catalyst, and the support of a Corridor Manager and programs already in place to assist corridor businesses, Nicetown is well positioned to set and achieve economic development goals for Germantown Avenue. Suggested goals and activities are presented in the Recommendations section of this plan.

Area Housing Analysis

Over the past few decades, outmigration has hit hard in the Nicetown neighborhood. Census and ESRI data show that while Philadelphia as a whole experienced a slight population increase of 0.6% from 2000 to 2010, over the same period Nicetown's population continued to decline from 11,725 in 2000 to 10,460 in 2010, a decrease of 10.78%. Housing data available through ESRI show a corresponding 12.5% decline in occupied housing units. In 2000, the Nicetown plan area included 4,988 total housing units with a vacancy rate of 14.4% (4,269 occupied and 719 vacant). Currently there are 4,589 total housing units with a vacancy rate of 18.6% (3,735 occupied and 854 vacant). Of the occupied housing units, 2,245 (60%) are owner occupied, and 1,490 (40%) are renter occupied. Fifty-nine percent of owner occupied housing units do not have mortgages. The median home value is \$54,724 and the median rent is \$539/month. The vast majority of housing units (78%) are attached single family units (mostly rowhomes), and the median home age is 72. Nicetown Court I, which was completed in 2011, represents the first new housing units added to the project area in more than six years.



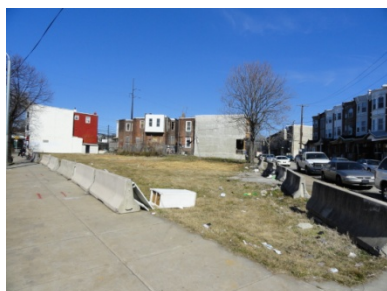
Area Anchor Developments

Nicetown Court I was the first in a series of large residential and mixed use developments the CDC anticipates will help jump-start area development. Located at 4330-52 Germantown Avenue, the project replaced the neighborhood's most visible vacant buildings with new construction containing 37 units of affordable apartments and 3,900 square feet of first floor retail space, creating a remarkable transformation for this highly visible block. With residential lease up completed in just one month, Nicetown Court I has proved to be a huge success.

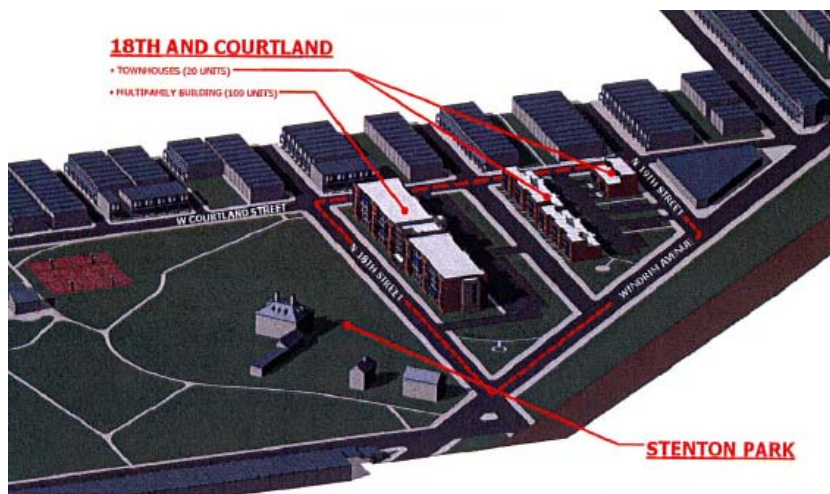


Before & after: 4330-63 Germantown Avenue – Nicetown Court I

The second planned anchor development is Nicetown Court II, slated to break ground on both sides of the 4400 block of Germantown Avenue in June 2012. This project involves construction of 50 units of affordable housing and 6,000 square feet of commercial space on what is now primarily publicly owned vacant land. Together, these projects revitalize the most blighted, barren sections of Germantown Avenue and provide visual continuity from the Wayne Junction station to the more concentrated commercial section of Germantown Avenue.



Current conditions on the east side 4400 block of Germantown Avenue and elevation of Nicetown Court II proposed for that site



1801 Courtland design concept by Kramer+Marks Architects

Nicetown CDC envisions a third anchor development at 1801 Courtland Street, a 3½ acre vacant lot adjacent to Stenton Park. The current design concept includes 20 townhomes and a 100 unit multifamily building, providing the opportunity for a mix of affordable and market rate options. Located two blocks from Wayne Junction station, this project will also achieve transit oriented design goals.

Additional Opportunities

Addressing Vacancies

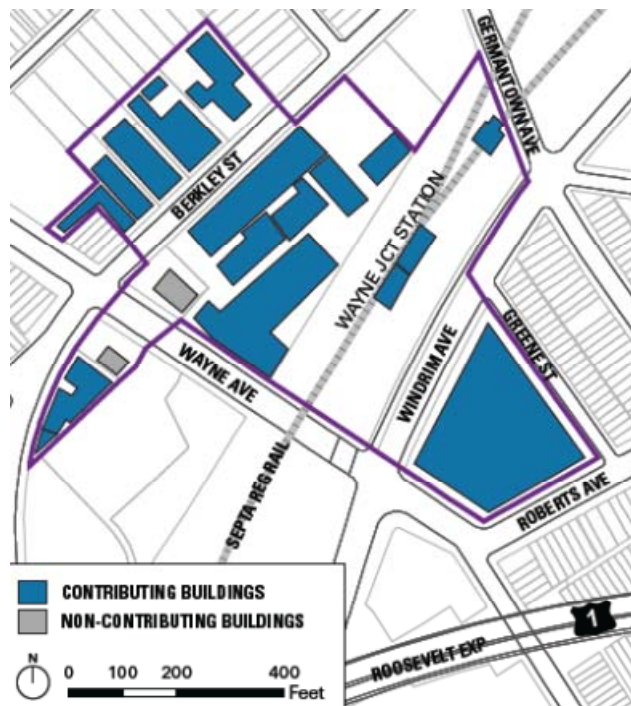
As planned anchor sites raise the profile of the community, Nicetown CDC should simultaneously offer additional options to potential residents that address the high volume of vacant properties and lots, such as the Philadelphia Housing Development Corporation's Housing Rehabilitation Program (HRP), and scattered site in-fill projects. Not only does this have the potential to bring new residents to the neighborhood, it can also help retain residents who see the tide of abandonment turned. Priority should be given to the blocks immediately off Germantown Avenue to encourage redevelopment of the commercial corridor and the blocks that fall between the Germantown Avenue anchor developments and the 1801 Courtland Street site, to connect areas of revitalization.

Owner Occupied Improvements

Along with blight reduction through programs which address vacant properties and lots, the CDC should continue to pursue Targeted Housing Preservation Program funds for owner-occupied units in need of building façade or basic systems repair work to their homes. With a small match of \$500, owners can receive up to \$20,000 in improvements to their home's exterior and/or systems. Not only will this add another layer of improvements to targeted blocks, it will also allow homeowners to undertake vital repairs with the potential to impact the integrity of neighboring properties, thereby preventing the spread of repair issues and more effectively attracting and retaining residents to those blocks.

The Wayne Junction Historic District

In February 2012, the Pennsylvania Historical & Museum Commission approved the Wayne Junction National Historic District (see map at right). Contributing buildings on income producing properties in this district are eligible for 20% tax credits to offset the cost of rehabilitation. Since the district incorporates the Wayne Junction train station, it is prime for transit oriented mixed-use redevelopment. The relatively large size of contributing buildings offers the possibility to develop another anchor site. A marketing plan to attract developers to the district should be prepared and implemented.



Senior Housing Needs

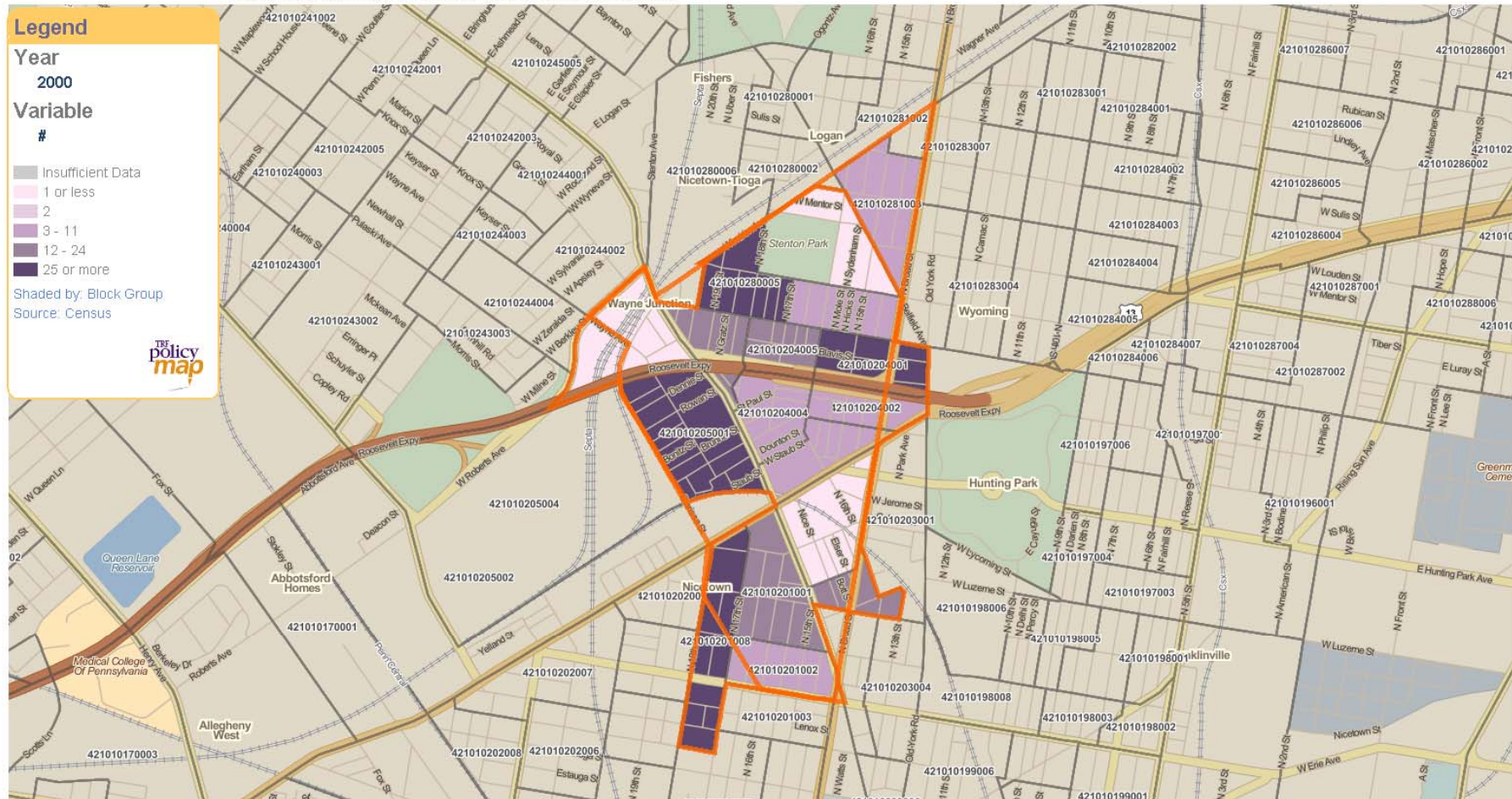
Residents and members of the advisory committee identified a critical need for affordable senior housing within the plan area. The project area includes 870 households where the head of household is age 65 or older, representing 23% of the total households. According to the Philadelphia Corporation for Aging study *Looking Ahead: Philadelphia's Aging Population in 2015*, while Philadelphia's total population is expected to decline from 2005 to 2025, the age 55+ population will grow 11%, and the 65+ group will grow 13%. According to The Reinvestment Fund's Policy Map site, 287 residents age 65 or older in the plan area's block groups are living in poverty. (Some of the block groups extend outside the plan area. See Map 7 for further information.) With a median home age of 72, many seniors in the plan area are living in deteriorating conditions because they cannot afford to maintain and repair their aging homes. Further, the vast majority of homes are two- or three-story row homes with front stairs, stairs within the home, no first floor bathroom or bedrooms and doorways too narrow to accommodate wheelchairs or walkers. The addition of affordable senior housing to Nicetown will allow elderly residents to age in place, providing them the opportunity to stay in the community and avoid unnecessary nursing home costs.

Through Nicetown Courts I & II, Nicetown CDC has laid the groundwork for a strong housing strategy to coincide with economic development activities for Germantown Avenue. The Recommendations section of this plan includes goals and activities designed to both build upon economic improvements and act as a catalyst for further growth.

Map of Custom Regions (Block Groups in Nicetown, Nicetown Plan Area) and Block Group (421010280003, PA) with Number of people 65 or older living in poverty as of 2000.

Number of people 65 or older living in poverty as of 2000.

Count of population 65 years and older living below poverty level in 2000.



Recommendations

Over the past decade, Nicetown CDC has worked hard to move revitalization of Germantown Avenue and change Nicetown for the better. The NTCDC is contracted by OHCD to administer a Neighborhood Advisory Committee (NAC) program, which delivers social services in an 11 census tract area of Northwest Philadelphia. It also runs a number of community programs including a Neighborhood Energy Center, community Land Care, a computer center, emergency food cupboard, community garden, and block captain and business association support. It has rehabilitated its offices at 4300 Germantown Avenue, rehabilitated and sold vacant residential properties and through the Housing Rehabilitation Program (HRP), assisted homeowners with façade improvements and basic systems repairs through the Targeted Housing Preservation Program (THPP), and is currently involved in development of Nicetown Court II, which, along with Nicetown Court I is bringing significant improvements over two blocks of Germantown Avenue through construction of a total of 87 affordable housing units and 9,900 square feet of new commercial space.



The recommendations included in this plan are intended to build upon these investments and further Nicetown's housing and economic development strategy. They are informed by analysis of existing land conditions, input received from the residents and stakeholders, the business and shopper surveys, and the commercial analysis. They provide a holistic approach to development in Nicetown, including strategies that directly address improvements on the Germantown Avenue commercial corridor and adjoining residential blocks, as well as non-development strategies that provide critical support to these activities through improvements to infrastructure, safety and community services.

Following the recommendations are a potential ten year timeline for implementation, and a table of resources available to support these activities. The resource table is comprehensive, but not exhaustive, and identifies sources available at the time this plan was written. Nicetown CDC should continue to seek out new funding opportunities from the sources listed here, as well as funders not included in this plan.

Economic Development Recommendations

The commercial analysis in conjunction with the survey results suggests a number of strategies for improving the business climate in the Nicetown section of the Germantown Avenue commercial corridor in Nicetown. All economic development activities should achieve the following goals:

- **Focus on creating a diverse business mix in Corridor, rather than only retail business attraction.**

With limited disposable income, households spend a relatively larger percentage of their incomes on services versus consumer goods. Services located on Germantown Avenue, such as hair salons, barber shops, health care and child care centers generate foot traffic which can translate into sales for retail stores in close proximity.

- **Be strategic in selecting locations for investment.**

The Nicetown CDC has been a powerful force in corridor revitalization activities to date. Given a limited funding environment, the CDC should focus on acquiring and renovating or facilitating the third party rehabilitation of specific properties that are negatively impacting or could positively impact adjacent concentrations of successful establishments. The goal should be encouraging longer continuous stretches of well-maintained occupied commercial space that enhances the convenience of Germantown Avenue as a walkable commercial corridor. One example of this is Nicetown CDC's planned redevelopment of 4159-63 Germantown Avenue from its current blighted state into a Business, Arts and Cultural Center. As one of the only properties on the east side of the 4100 block of Germantown, its current dilapidated state creates a disproportionately negative impression of this node of the commercial corridor, and rehabilitating this single building will positively impact the more concentrated adjacent block. In the lower portion of corridor, redevelopment efforts should be focused incrementally west from Broad Street starting with buildings that have visibility from Broad.



Properties adjacent to 4159-63 Germantown Ave.



4159-63 Germantown Ave., slated to become the Business, Arts & Cultural Center

➤ **Create opportunities for businesses to move in with low fit-out investment.**

Store spaces in older commercial corridors are typically deteriorated and in need of significant fit-out to allow retail and service tenants to create an attractive, successful enterprise. Many prospective business owners do not have the resources and cannot obtain sufficient financing to cover substantial fit-out.

Although, the Nicetown CDC is addressing this problem by creating modern storefronts in its Nicetown Court I and Nicetown Court II LIHTC developments, the CDC could explore retrofitting selected existing storefronts to allow rapid occupancy by retailers with limited fit-out dollars. If a long-term tenant is not identified, this strategy would create opportunities for temporary or “pop-up” stores, community art shows, and other enlivening use of formerly deteriorated first floor space.

➤ **Retain long-time businesses.**

The commercial corridor is fortunate to have several long term anchor businesses, including a hardware store, a wholesaler, and several restaurants. While business attraction efforts are important, it is critical to meet the needs of these long term businesses. Sister Muhammed’s Kitchen will be relocated as a result of the development of Nicetown Court II. The NTCDC is making every effort to accommodate Sister Muhammad’s Kitchen in the retail portion of this new mixed-use development, and has a LOI in place.

➤ **Encourage TOD uses at Wayne Junction.**

The 2009 Germantown-Nicotown Transportation Oriented Neighborhood Plan encourages transit-oriented commercial uses at Wayne Junction. The CDC has remained committed to this goal and, when Nicetown Court II is constructed will seek tenants offering goods and services appropriate for both residents and commuters, such as those offering groceries and produce as well as prepared food, restaurants, coffee shops, newsstands, child care, personal care (hair and nail), dry cleaners and doctors and dentist offices.

➤ **Facilitate opportunities for non-store retailers.**

Cart operators and temporary vendors can provide a variety of goods to the community with relatively low start-up costs for the entrepreneur. Inexpensive secure storage facilities in close proximity to the commercial corridor could facilitate vendor operations of this type. The CDC should identify existing or potential new options for vendor cart and inventory storage and make this information available to prospective merchants.

The CDC views the underutilized space under the Route 1 overpass as an opportunity to encourage flea market type retail. Concentrating vendors in a designated area makes business sense in that more shoppers will be attracted and the disorder of vendors spreading goods on the street or sidewalk can be avoided. Some communities have installed masonry stanchions that allow quick installation of awnings over a vendor area and clearly define the space allocated to each merchant.

Funding is available on a competitive basis under the City of Philadelphia's Healthy Carts initiative to facilitate small cart-based businesses marketing fresh foods and produce in neighborhood settings.

➤ **Make marketing and promotion activities a priority for the Business Association.**

The goal of promotional activities is to build a positive image of the corridor and the neighborhood overall ("Working Together To Put The Nice Back In The Town") and to encourage support of local businesses and services by people living and working in the neighborhood as well as visitors. The Business Association should use a variety of channels (press releases to print and broadcast media, social networking sites, postings on community events calendars in local publications) to get the word out about good things happening in the commercial corridor and surrounding neighborhood. Examples of opportunities to "get the word out" include: the Give Back festival, corridor improvements, the development of Nicetown Court I and II, the efforts of organized Block Captains, the Titans football team, the Boys & Girls Club, Mastery @ Gratz, and other often "unsung" activities.

Recommended Economic Development Activities:

1) Complete development of incubator and business support space at 4159-63 Germantown Ave.

The CDC has received funding and is moving forward with development of the Business, Arts and Cultural Center at 4159-63 Germantown Avenue. The Center will provide incubator space for eight businesses as well as business support services that will serve establishments throughout the Corridor. The location of the Center should allow effective use of signage to advertise the presence of incubator businesses to pedestrians, drivers and transit riders traveling on Germantown Avenue. This visibility will be of particular value to start-up businesses. The CDC should consider partnering with Lasalle University or another Philadelphia institution to enrich the types of training and technical assistance available at the Center.

2) Conduct a coordinated façade/streetscape improvement program for the 4100 through 4400 blocks of Germantown Avenue.

This section of Germantown Avenue, from the gateway at Hunting Park Avenue to the Wayne Junction station gateway at Windrim Avenue, includes the most highly concentrated commercial sections of the corridor and a number of Nicetown CDC past, current and planned investment projects. A coordinated façade/streetscape improvement program will allow property and business owners to accomplish façade improvements at reduced cost and provide a unified appearance

through banners, sidewalk refurbishment, historically sensitive lighting, trash receptacles, benches and greening. These improvements will present an inviting, positive image of what the corridor has to offer, encouraging shoppers to buy locally, increase market activity, and bring significant economic benefits to the Nicetown neighborhood.



Example of current commercial corridor conditions



Proposed façade/streetscape improvements include:

- | | | |
|----------------------|-----------------------|--|
| ① Cornice repair | ③ Façade improvements | ⑤ Unifying awnings/signage |
| ② Window replacement | ④ Storefront upgrades | ⑥ Streetscape elements (trees, lighting, banners, benches, etc.) |

3) Provide technical assistance for upgrading physical plant at owner-occupied businesses.

The Germantown Avenue commercial corridor has a relatively large number of businesses that operate out of owned (rather than rented) real estate. As property owners, these businesses are particularly invested in the success of the corridor. Long time businesses may have deferred maintenance and dated systems. When conducting a façade/streetscape improvement program, the CDC should also conduct outreach on these long-term merchants to determine what they need to maintain and upgrade their properties, and connect them to available resources.

4) Inventory available space and communicate with targeted brokers.

The CDC should maintain an inventory of available commercial space along the corridor. The inventory should include the size and condition of the available space, and any storage and parking characteristics associated with the property. The CDC should develop a distribution list of commercial real estate agents/brokers who are active in listing and leasing properties on Germantown Avenue. Brokers who specialize in certain tenants types desired on the corridor (e.g. restaurants) should be included on this list. The inventory, along with neighborhood demographics and information about revitalization activities and new business locations in the corridor, should be forwarded to this distribution list periodically. The CDC may also wish to invite real estate agents and brokers on a corridor tour showing available properties. The tour can start or end with refreshments at the CDC community center and an opportunity for attendees to ask questions and learn more about the Nicetown neighborhood.

5) Investigate Business Improvement District (BID) feasibility.

Much of the feedback from the merchant survey indicated dissatisfaction with maintenance and cleanliness in the Corridor. Establishment of a BID is one strategy that could facilitate street scape improvement and ongoing maintenance. The large percentage of businesses operating in owned real estate could enhance interest in a BID, although businesses operating on limited margins often resist the concept of a real estate tax surcharge to fund BID operations. The CDC should begin discussions with corridor businesses and the district councilperson to discuss the potential advantages of a BID in addressing maintenance and cleanliness and to gather feedback on merchant concerns about this structure. A BID was also recommended for the area surrounding Broad and Erie; perhaps these efforts could be coordinated.

6) Use social media to involve business people who may not be able to attend meetings.

The business survey results indicate that business association membership and participation in the corridor is limited. Many corridor businesses operate with only one or two full-time employees, typically the owner(s) or one other worker. It is difficult for the owner to leave the business during operating hours to attend a meeting, even if the business owner believes that the session would be useful. Social media, Skype and other on-line tools may offer an option for conveying information to and facilitating interaction between business owners, and offering merchants an opportunity to provide input about issues and opportunities along the corridor.

7) Develop and implement a cart/street vendor plan.

The plan should identify desirable market areas for street vendors, indicate where vendor storage will be located, describe an outreach strategy to recruit vendors to market areas, and outline a process for informing street vendors of regulations affecting their operations and available funding, such as the Healthy Carts Initiative.

8) Develop and implement a TOD marketing plan for Nicetown Court II and the newly created Wayne Junction historic district.

In February 2012, the Pennsylvania Historical & Museum Commission approved the Wayne Junction National Historic District in the blocks immediately surrounding the Wayne Junction train station. Contributing businesses on income producing properties in this district are eligible for 20% tax credits to offset the cost of rehabilitation. The historic district, along with the Nicetown Court II project, present significant transit-oriented business opportunities that should be communicated to brokers and marketed to potential developers.

Housing Development Recommendations

Over the past two decades, Nicetown's population has steadily declined. Yet at the same time, Nicetown and the surrounding area have benefitted from significant recent investment in transportation and economic development projects. It is critical for Nicetown's future that these investments become the catalyst for rebuilding a residential base that can support continued economic growth. Therefore, a housing development strategy for the Nicetown plan area should be designed to achieve the following goals:

- **Prioritize housing development in areas where economic development has occurred or is slated to occur.**

SEPTA's \$33 million renovation of the Wayne Junction station and the nearby commercial/retail offerings created through the Nicetown Court I & II mixed use developments provide an excellent opportunity for the CDC to rehabilitate existing adjacent housing and develop new housing that will seize on transit-oriented benefits these investments provide.

- **Eliminate blight in highly visible areas.**

The positive impact of current and planned investments is adversely affected when adjacent areas still create an impression of distress. Many blocks that are ideally situated to build planned redevelopment of the commercial corridor and transit oriented design are not in great shape and should be addressed through preservation activities and in-fill development opportunities.

- **Create additional anchor sites that are visually significant and will encourage further economic development efforts.**

Further opportunities exist for Nicetown to develop anchor sites in close proximity to Wayne Junction station and the commercial corridor. The size and highly visible nature of these developments will provide a tremendous boost to Nicetown will maximize the impact of all their development activities.

- **Fight against outmigration that weakens the economic health of the neighborhood.**

Strategies which help preserve existing housing stock, address blight and fill the areas between anchor sites with additional development will allow Nicetown to attract and retain long-term residents and reverse the trend of outmigration.

Targeting properties on blocks included in the homeownership project will add further stability to these blocks and allow the CDC to leverage these improvements through increased sales and higher resident retention.

4) Market housing opportunities in the newly created Wayne Junction historic district.

Since many of the contributing buildings in the Wayne Junction historic district are ideal for mixed use development, a district marketing plan should highlight opportunities for transit oriented housing development.

Additional Recommendations

These economic and housing goals will be strengthened through a holistic community development approach that addresses infrastructure, quality of life and safety issues which support and contextualize housing and economic development improvements.

Recommended Infrastructure Improvements

1) Work with the Streets Department to make improvements to traffic flow around Germantown Avenue

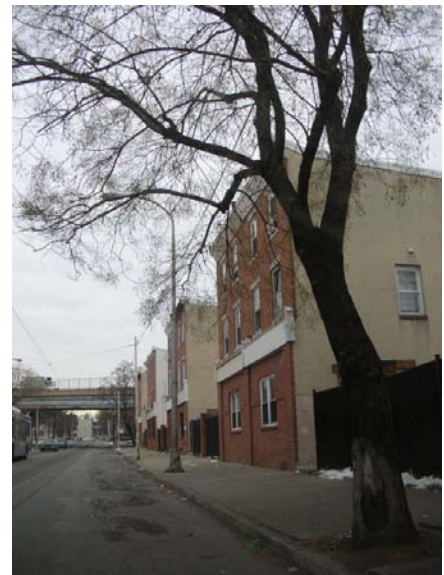
As noted in the Philadelphia City Planning Commission Nicetown 2010 Redevelopment Area Plan, a number of streets which intersect Germantown Avenue change direction at the avenue, preventing through traffic and making it difficult to navigate the neighborhood. As Nicetown works to build its commercial corridor and attract shoppers from around the area, ease of access can make the difference between drivers choosing the corridor or going elsewhere and should be improved.

2) Expand commuter parking options for Wayne Junction Station

Only on-street parking is available around Wayne Junction Station, and a number of streets surrounding the station have residential permit parking restrictions to prevent commuter parking. Increasing and improving park and ride options can greatly enhance development of transit oriented businesses near Wayne Junction. A relatively simple solution is to allow reverse-in angle parking on both sides Windrim Avenue in front of Wayne Junction, which will add at least 30 new on-street spaces. Additionally, Planning Commission staff and the Delaware Valley Regional Planning Commission are researching ridership to determine demand for a park and ride lot, which could potentially be located just north of the station on Wayne Avenue.

3) Extend planned commercial corridor streetscape improvements to other sections of Germantown Avenue.

Unifying elements of streetscape improvements for the commercial corridor, such as historically sensitive pedestrian lighting, sidewalk improvements and trash receptacles should be extended along Germantown Avenue, visually extending improvements from one gateway or anchor to the next. For example, the 4300 block of Germantown Avenue is primarily residential, however adding the streetscape improvements here links investments from the commercial corridor to the Nicetown Court I anchor development.



Residential properties on the 4300 block of Germantown Avenue

Recommended Open Space Improvements

1) Incorporate streetscape improvements into open spaces

The 4300 block of Germantown Avenue contains a considerable amount of open space including the entrance to Nicetown Park, which is south of the Roosevelt Boulevard overpass, and a sitting plaza just north of the Roosevelt Boulevard overpass.

Extending the streetscape improvements into these highly visible open spaces will communicate the continuity of investment along Germantown Avenue and bring new life to these valuable community assets.

2) Community Garden/Farmer's Market

Established as a community orchard garden in 2009, this 2-acre open space to the rear of the NTCDC Community Center and Steel Elementary School (4300 block of Germantown Ave) has been a challenge to maintain. Nevertheless, the NTCDC and dedicated neighborhood residents have harvested fresh produce and fruit, distributing it to needy families. The goal is to expand it to a revenue-generating urban farm, with flowers, herbs, and other items that can be sold in a farmers market. The design will also incorporate a water source, sitting areas, greenhouse, and a rain barrel/storm water management system.

3) Complete master plan for Nicetown Park that will add more active space

Nicetown Park is a largely passive park that sits behind the east side of Germantown Avenue from St. Paul Street to the Roosevelt Boulevard Overpass. Improving and enlarging the active space in this park through playground upgrades and the creation of performance space will increase the quality of life and help attract and retain area residents.

4) Develop a budget and timeline to transform vacant land under the Roosevelt Boulevard overpass into a skate park and vending bazaar.

What was once a public parking lot serving Germantown Avenue businesses under and to the north of the Roosevelt Boulevard overpass now sits as 2½ acres of vacant, unused land. Because of stormwater management issues, this lot is unlikely to be redeveloped, so the community envisions transforming this dead space into an active skate park. The land is owned by the City of Philadelphia and the Philadelphia Redevelopment Authority and the Redevelopment Authority plans to transfer its land to the City to



Entrance to Nicetown Park from Germantown Avenue



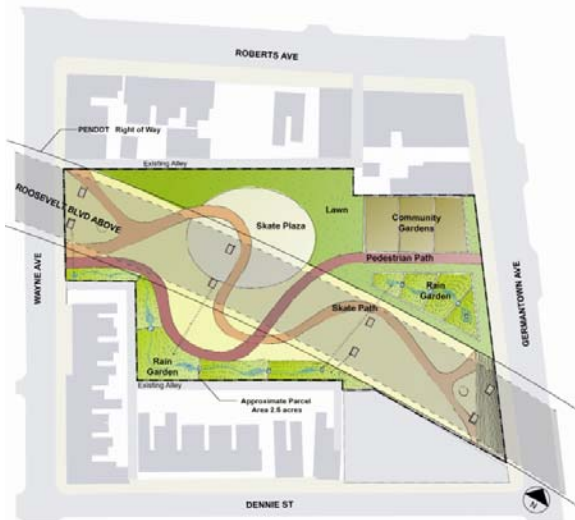
Sitting plaza at Germantown Avenue and Cayuga Street



Community garden near NTCDC Community Center and Steel Elementary



Vacant land under the Roosevelt Boulevard overpass



Franklin's Paine's vision for the Nicetown Skatepark

facilitate the creation of park space. Franklin's Paine Skatepark Fund has developed a conceptual design for the park that incorporates community gardens and stormwater management. With easy access from almost anywhere in the Delaware Valley via the Wayne Junction station, this park could become a significant draw for Nicetown, providing a new customer base for Germantown Avenue shops and restaurants.

Turning this skate park vision into a reality involves a number of agencies and groups including Nicetown CDC, Franklin's Paine, PennDOT, the Redevelopment Authority, Public Property, the Water Department, and Parks and Recreation. These groups have met to discuss the planned park; now the task is to develop a budget, identify potential sources of funds, and create a timeline of predevelopment and construction activities.

5) Work with the Federal Transportation Administration to address blighted conditions on CSX property along Windrim Avenue.



Trash on the CSX property along Windrim Avenue

CSX owns all of the property along north side of Windrim Avenue from Germantown Avenue to Broad Street, a major access route for the Wayne Junction train station. The property is significantly blighted, with overgrown weeds and broken fence panels interspersed among large piles of trash. Its close proximity to several planned improvement areas, including the Wayne Junction station, the Wayne Junction historical district, and anchor development sites is detrimental to their positive impact. The NT CDC has been in contact with the

Federal Transportation Administration who has indicated a willingness to coordinate meetings with CSX, SEPTA, PennDot, Conrail and other stakeholders to address this issue.

Recommended Safety Improvements

1) Incorporate safety enhancements into commercial corridor improvement program.

The pedestrian lighting which will serve as a unifying element in the commercial corridor improvement program will have the added benefit of increasing safety along Germantown Avenue. Additionally, the Commerce Department is developing a program that will offer incentives to businesses who install security cameras that can be accessed by law enforcement, which can be part of the upgrades offered to participants.

2) Establish a regular schedule for police to convene with members of the community.

Increasing the number of beat patrols and curfew enforcement were the most often cited concerns on residents' community surveys. Regular meetings between police who patrol the neighborhood and members of the community will allow for ongoing sharing of information and common solutions, while also strengthening the relationship between parties.

Recommended Community Service Improvements

1) Conduct a feasibility study for possible senior center locations and program partners.

There are vacant buildings around Wayne Junction and in Stenton Park that are potential sites, along with the possibility of including it in the anchor site at 1801 Courtland Street.

2) Encourage additional childcare and afterschool options in the community through marketing and connection to available resources.

Residents identify a strong need for additional childcare and afterschool options in the community. With the creation of the Wayne Junction historic district and Nicetown Court II slated to get underway in May 2012, the opportunities to develop transit oriented service businesses like childcare are great in Nicetown. Through the Business, Arts & Culture Center, the CDC can assist potential childcare operators to identify potential sites, understand regulations and develop a business plan for success.

3) Create a neighborhood directory of community and faith based services.

4) Explore social media options for community and faith based organizations to share information and collaborate.

Ten Year Timeline

	5/12- 10/12	11/12 - 4/13	5/13- 10/13	11/13 - 4/14	5/14- 10/14	11/14 - 4/15	5/15- 10/15	11/15 - 4/16	5/16- 10/16	11/16 - 4/17	5/17- 10/17	11/17 - 4/18	5/18- 10/18	11/18 - 4/19	5/19- 10/19	11/19 - 4/20	5/20- 10/20	11/20 - 4/21	5/21- 10/21	11/21 - 4/22
Economic Development																				
Complete Business, Arts & Culture Center																				
Explore partnership with LaSalle or other institution																				
Predevelopment																				
Construction																				
Leaseup/closeout																				
Operations																				
Conduct Germantown Ave streetscape program																				
Develop scope and budget																				
Outreach to funders/stakeholders																				
Fundraising																				
Outreach to businesses/owners																				
Implementation 4100-4200 blocks																				
Implementation 4300-4400 blocks																				
Owner-occupied maintenance program																				
Outreach to businesses/owners																				
Implementation																				
Space inventory/broker communication																				
Investigate BID feasibility																				
Develop social media communication program for corridor businesses																				
Develop and implement street vendor plan																				
Historic district/Nicetown Court II TOD marketing plan																				
Housing																				
Anchor Development at 1801 Courtland Street																				
Identify development partner(s)																				
Negotiate partner roles & compensation																				
Preliminary development plan, budget & sources																				
Meet w/electeds, funders, stakeholders																				
Property acquisition process																				
Funding																				
Predevelopment																				
Construction																				
Leaseup/Sales																				
Operations																				

	5/12- 10/12	11/12 - 4/13	5/13- 10/13	11/13 - 4/14	5/14- 10/14	11/14 - 4/15	5/15- 10/15	11/15 - 4/16	5/16- 10/16	11/16 - 4/17	5/17- 10/17	11/17 - 4/18	5/18- 10/18	11/18 - 4/19	5/19- 10/19	11/19 - 4/20	5/20- 10/20	11/20 - 4/21	5/21- 10/21	11/21 - 4/22
Housing Rehab & Scattered Site Development Phase I																				
Identify development partner																				
Negotiate partner roles & compensation																				
Meet district councilperson re: site selection/funding																				
Preliminary design, development plan & budget																				
Property acquisition processes																				
Meetings w/potential funders (City, FHLB, PHFA, etc.)																				
Predevelopment																				
Submit funding applications, HRP package																				
Construction																				
Leaseup/Sales																				
Operations																				
Targeted Housing Preservation Program on Phase I infill/rehab blocks																				
Submit target area application																				
Outreach to homeowners																				
Develop repair scopes																				
Submit individual home applications																				
Construction																				
Housing Rehab & Scattered Site Development Phase II																				
Meet district councilperson re: site selection/funding																				
Preliminary design, development plan & budget																				
Property acquisition processes																				
Meetings w/potential funders (City, FHLB, PHFA, etc.)																				
Predevelopment																				
Submit funding applications, HRP package																				
Construction																				
Leaseup/Sales																				
Operations																				
Targeted Housing Preservation Program on Phase I infill/rehab blocks																				
Submit target area application																				
Outreach to homeowners																				
Develop repair scopes																				
Submit individual home applications																				
Construction																				
Historic district TOD housing marketing plan																				

	5/12- 10/12	11/12 - 4/13	5/13- 10/13	11/13 - 4/14	5/14- 10/14	11/14 - 4/15	5/15- 10/15	11/15 - 4/16	5/16- 10/16	11/16 - 4/17	5/17- 10/17	11/17 - 4/18	5/18- 10/18	11/18 - 4/19	5/19- 10/19	11/19 - 4/20	5/20- 10/20	11/20 - 4/21	5/21- 10/21	11/21 - 4/22
Infrastructure																				
Work with Streets Dept on traffic flow improvements																				
Expand commuter parking options at Wayne Jct Station																				
Back in angle parking																				
Park & ride lot																				
Open Space																				
Streetscape improvements on Germantown Ave. open spaces																				
Create additional active space in Nicetown Park																				
Create preliminary design																				
Meet with potential stakeholders																				
Fundraising																				
Implementation																				
Budget and timeline for skate park																				
Work with FTA to address CSX property blight																				
Safety																				
Incorporate safety elements into streetscape improvements																				
Establish a regular schedule for meetings between the police and the community																				
Community Services																				
Feasibility study for senior center locations & partners																				
Childcare marketing and support																				
Community & faith based organization directory																				
Explore social media options for community & faith based organizations																				

Project Resources

Source Contact Information	Eligible Project Types \$\$\$ range	Application Process Competitiveness	Notes
Low Income housing Tax Credits Pennsylvania Housing Finance Agency www.phfa.org	<ul style="list-style-type: none"> Affordable rental housing developments, and residential portion of larger mixed use projects 75% or more of total project costs 	<ul style="list-style-type: none"> One round annually in October. Application is complex. Very Competitive 	<ul style="list-style-type: none"> Nearly all tax credit projects have at least 15 units Tax credits are sold to an investor, who provides equity for the investment
PennHOMES Funding Pennsylvania Housing Finance Agency www.phfa.org	<ul style="list-style-type: none"> Affordable rental housing developments of 10 units or more, and residential portion of larger mixed use projects Maximum of \$32,500 per unit and \$1.5 million per development 	<ul style="list-style-type: none"> One round annually in October. Application is complex. Very Competitive 	<ul style="list-style-type: none"> Typically used in conjunction with LIHTCs Minimum project size is 10 units
CDBG/HOME/HTF funds through City of Philadelphia, Office of Housing and Community Development 1234 Market St. 17 th Floor Philadelphia, PA 19103 www.phila.gov/ohcd	<ul style="list-style-type: none"> Affordable residential rental, mixed use and homeownership developments Generally no more than \$1.5 million per project 	<ul style="list-style-type: none"> Contact district Councilperson for initial discussion of project, followed by meeting with OHCD about project Competitive RFP 	<ul style="list-style-type: none"> Political support is key
Local Initiatives Support Corporation 718 Arch Street, Suite 500-S Philadelphia, PA 19106 www.lisc.org/content/offices/detail/611	<ul style="list-style-type: none"> Predevelopment, acquisition, and construction financing for affordable rental, homeownership, mixed use, and commercial developments carried out by CDCs Predevelopment recoverable grants \$25,000 – 75,000 Construction loan amounts vary, up to \$1 million 	<ul style="list-style-type: none"> Contact LISC to discuss application Funding decision based on project feasibility, mission fit, and other factors Project and organization must meet underwriting standards 	
The Reinvestment Fund www.trfund.org 1700 Market Street, 19 th Fl Philadelphia, PA 19103	<ul style="list-style-type: none"> Predevelopment, acquisition, construction, and mini-perm financing for affordable rental, homeownership, and mixed-use developments Predevelopment - up to \$50,000 Construction - based on project requirements 	<ul style="list-style-type: none"> Contact TRF to discuss application Project and organization must meet underwriting standards 	

Source Contact Information	Eligible Project Types \$\$\$ range	Application Process Competitiveness	Notes
Fresh Food Financing Initiative Administered jointly by TRF and The Food Trust www.trfund.com/TRF-food-access.html www.thefoodtrust.org	<ul style="list-style-type: none"> Grants and loans for standalone supermarkets in underserved areas, and supermarkets occupying more than 50% of the floor area of larger developments Grants of up to \$250,000 for predevelopment, land assembly/capital costs, pre-opening soft costs, and construction Construction/permanent loans of up to \$1.6 million with a term up to 10 years 	<ul style="list-style-type: none"> Available on a rolling basis until funds run out; see applications and process on TRFs website 	
City of Philadelphia Commerce Department Neighborhood Planning and Pre-Development Fund www.phila.gov/commerce/comm/ 1515 Arch Street, 12 th Floor Philadelphia, PA 19102	<ul style="list-style-type: none"> Predevelopment grants for neighborhood economic development projects that will create jobs Up to \$25,000 	<ul style="list-style-type: none"> Application available from Commerce Department Moderately competitive 	
City of Philadelphia Commerce Department Neighborhood Development Grants	<ul style="list-style-type: none"> Gap financing grants for neighborhood economic development projects that will create jobs Up to \$300,000 	<ul style="list-style-type: none"> Application available from Commerce Department Moderately competitive 	
Philadelphia Industrial Development Corporation Neighborhood Development Fund Loan Program/Growth Loan Program www.pidc-pa.org 1500 Market St, 26 th Floor Philadelphia, PA 19102	<ul style="list-style-type: none"> Acquisition, rehab, and construction costs for development projects Loans of up to \$500,000 at below market rates 	<ul style="list-style-type: none"> Contact PIDC for application Requests underwritten in accordance with PIDC underwriting criteria 	
Pennsylvania Department of Community and Economic Development – Keystone Communities Program http://www.newpa.com/find-and-apply-for-funding/funding-and-program-finder/keystone-communities-program	<ul style="list-style-type: none"> Various funding pools for different project types, good gap financing source Types of eligible projects include economic development, infrastructure, facades, anchor buildings, public improvement 	<ul style="list-style-type: none"> Contact DCED, complete Single Application for Assistance Moderately competitive 	State Senator/Representative support important

Source Contact Information	Eligible Project Types \$\$\$ range	Application Process Competitiveness	Notes
Federal Home Loan Bank of Pittsburgh Affordable Housing Program Grants www.fhlpb-pgh.com	<ul style="list-style-type: none"> Grants for affordable rental and homeownership developments. Could be used for residential component of mixed use project Maximum grant \$250,000 	<ul style="list-style-type: none"> One funding round annually, typically August Competitive 	Member bank must sponsor application
Federal Home Loan Bank of New York Affordable Housing Program Grants www.fhlbnny.com	<ul style="list-style-type: none"> Grants for affordable rental and homeownership developments. Could be used for residential component of mixed use project Maximum grant \$20,000 per unit or 10% of total available funds, whichever is less 	<ul style="list-style-type: none"> One funding round annually, typically April Very Competitive for projects outside NY, NJ Puerto Rico and the U.S. Virgin Islands 	Member bank must sponsor application
Commercial Banks	<ul style="list-style-type: none"> Residential and commercial projects that can support debt payments out of cash flow Amounts determined by project economics 		

Appendices

SURVEY OF COMMERCIAL CORRIDOR BUSINESSES

Between March and June, 2011, Nicetown CDC consultants conducted in-store interviews of 23 businesses on Germantown Avenue, the Nicetown community's commercial corridor. Interviews with establishments on the 3700 through 4400 blocks of Germantown Avenue were structured to gather information about the nature of their businesses, recent trends, and observations about the commercial environment. A tabulated copy of the survey instrument is attached.

The interviewed business included:

- Eleven retail businesses, including six limited service restaurants, two hardware and security system stores, one thrift store, and one each grocery and specialty food stores;
- Nine service businesses, including three barbershops, two day care centers, one laundromat and one each shoe, computer and auto repair businesses;
- Two wholesale establishments, one selling snack foods and one selling natural health and beauty products; and
- One bar.

General Information

While the commercial corridor has a very high percentage of vacant store fronts (about forty percent), it also has a stable core of operating businesses and a few new businesses are opening. Nearly forty percent of the establishments indicated they have been doing business at their current location for more than ten years, including two that have been in operation more than twenty-six years. All are small independently owned and operated businesses, and none operated a business at a separate location.

More than half of businesses owners also own the business location (thirteen own /ten rent). The interviewed businesses employ a small number of employees: an average of 2.2 full time, and 0.6 part time employees. Most owners are operating the business as jobs for themselves and family members.

While only about a third of interviewed business owners are active in any business association, most expressed a desire to gain more knowledge about plans for

upgrading the commercial corridor and the business environment. Given owners' long hours of operation and small number of employees, business association organizers will have to employ creative strategies to maximize business association participation.

Hours of Operation

All of the businesses begin operations by 10:00 am on weekdays, and half operate ten or more hours per day. Approximately ninety percent operate six or seven days every week. Businesses reported their busiest hours and days of operation varied by the type of business: barbershops were busiest Thursday through Saturday; limited service restaurants were busiest at lunch and dinner time.

Customer Base

Given the community-serving nature of businesses on the corridor, it is not surprising most customers come from the immediate vicinity. There are, however, a fairly large number of businesses that draw customers from other parts of North Philadelphia and other parts of the city. A few businesses attract customers from outside of the city. Most businesses serve customers with characteristics close to neighborhood demographics with no discernable predominant type of customer, while one wholesaler principally serves a network of foreign-born store owners.

Modes of Transportation and Parking Issues

Businesses reported their customers reach them by car or public transportation in approximately equal numbers. A slightly smaller share of customers walk to their stores and a very small number come by bicycle. None of the stores reported their customers or employees had trouble parking on Germantown Avenue, however, parking may become an issue when the many vacant stores on the corridor are restored and reoccupied. Two businesses, the auto repair shop and small grocery store, are trying to acquire adjacent vacant lots to provide off street parking and vehicle storage to improve business operations.

Sales Trends

Nearly two thirds (sixty-four percent) of businesses reported steady sales within the last two years, while about twenty percent reported declining sales. Declining sales were attributed to the state of the economy and business disruptions attributable to site assembly for future community development projects. The vast majority of owners

reported they planned to maintain their businesses at current size over the next two years, while three project expansion and one she is closing her business due to relocation related to a new community development project.

Positive and Negative Impacts on Business

When asked whether any recent changes in the surrounding area had a positive impact on the business environment, none of the respondents cited improvements. Negative impacts included disruptions caused by unruly school age students going home from or skipping school, drug activity, alcohol consumption and rowdy behavior related to Stop & Go's, deteriorated streets and sidewalks, illegal dumping in vacant buildings and lots, and automobile break-ins and theft.

Suggested Improvements

When asked what specific activities would improve corridor business conditions, the top four suggestions were improved maintenance and cleanliness; coordinated promotional activities; access to business financing, and support and advice on how to strengthen business management and improve profitability.

Priority Improvement Ideas	
15	Improved maintenance/cleanliness
13	Coordinated promotional activities by businesses
13	Accessibility to financing for your business
13	Support and advice on how to strengthen business management and improve profitability
12	Addition of businesses that would complement the services or products you supply
12	Information on and access to funding to improve energy efficiency and reduce utility costs
11	Physical improvements to neighborhood streets (lighting, trashcans, improved sidewalks)
11	Better police patrolling/response time
10	Better street signage
9	Affordable facade improvement program
6	More parking

SURVEY INSTRUMENT

Business Name	Address	Nature of Business
Retail		
Bravo Pizza	3748 Germantown Ave	Limited Service Restaurant
Lin Deli	3801 Germantown Ave	Limited Service Restaurant
Baldi's Barbecue	4102 Germantown Ave	Limited Service Restaurant
Lucky Garden	4215 Germantown Ave	Limited Service Restaurant
Hot Pot Cuisine	4234 Germantown Ave	Limited Service Restaurant
Sister Muhammad's Kitchen	4449 Germantown Ave	Limited Service Restaurant
Samson Security Systems	3838 Germantown Ave	Hardware/Home Security And Contractors
Joe Einhorn Hardware	4174 Germantown Ave	Hardware
Strictly Seafood	4167 Germantown Ave	Specialty Food
R&L Supermarket	4222 Germantown Ave	Grocery Store
Better The Second Time Around	4357 Germantown Ave	Thrift Store
Service		
Artistical Creations Barber	4169 Germantown Ave	Barber Shop
Marvelous Marv's Klassic Kuts	4171 Germantown Ave	Barbershop
Rah's Freehandz Barbershop	4221 Germantown Ave	Barbershop
Sister's Childcare Center	3904 Germantown Ave	Day Care
Tianna's Terrific Tots	4205 Germantown Ave	Day Care
R & R Laundromat	4412 Germantown Ave	Laundromat
Willie & Sons	3831 Germantown Ave	Shoe Repair
Joseph's Auto Collision Center	3913 Germantown Ave	Auto Repair
KE Custom PC	3933 Germantown Ave	Computer Repairs and Sale
Wholesalers		
Baryeh Imports	3752 Germantown Ave	Health and Beauty Products
Z & Z Distributors	4416 Germantown Ave	Snack Foods
Bars and Lounges		
Yellow Bird Nite Club	4175 Germantown Ave	Bars And Lounges

1. How long have you operated a business on Germantown Avenue? Total Responses 19

1.5 years to 5 years - 9
6 years to 10 years - 3

11 years to 15 years - 4
16 years to 25 years - 1

26 years to 30 years - 2

Is your business part of a chain? Total Responses 23: Yes 0 No 23

- Do you have any other stores? Total Responses 23 : Yes 0 No 23
- If so, how many? N/A

- Where are they located? N/A
- Are you a member of any business associations? Total Responses 18 : Yes 5
No 13
- Do you participate in the Nicetown Business Association? Total Responses 20 :
Yes 8 No 12

2. How many employees do you have? Total Responses 23

	Average Full-time	Average Part-time
Retail	1.5	0.7
Service	3.1	0.4
Wholesalers	1.5	.5
Bars And Lounges	***	***

3. What are your hours of business? Total Responses 22

Days of Operation		Hours of Operation	
5 day week	3	7 hours to 9 hours	8
6 day week	11	10 hours to 11 hours	6
7 day week	8	12 + hours	5

4. What are your busiest times/days of operation? Total Responses 16

Time of Day	Day of Week
Morning - 1	Friday – 1
Morning and night - 2	Wednesday thru Saturday - 1
Lunch time - 2	Thursday thru Friday - 5
Afternoon - 5	Varies - 2
Evening - 2	

5. Where do your customers come from? Total Responses 18

	100% to 76%	75% to 51%	50% to 26%	25% to 0%
Surrounding 5 blocks (1/2 mile radius)	7	3	8	2
Rest of North Philadelphia	2	0	8	7
Elsewhere in Philadelphia	2	0	3	10
Outside of the City	0	0	0	8

6. Are there any unique characteristics of your customers? Total Responses 11

<u>Limited Service Restaurants, Shoe Repair</u> General, all groups in the neighborhood – 3	<u>Barbershops</u> Young to elder, mostly men – 3
--	--

Most of my customers wear ragged ghetto-style clothing – 1 More younger males – 1 All ages, male and female – 1	
<u>Natural Health Products</u> Young to middle age, most African American – 1	<u>Hardware</u> Over 40 years of age – 1
<u>Grocery Store and Specialty Foods</u> 99% Black – 1 Mixed – 1	<u>Bars & Lounges</u> All kinds of people - 1
<u>Wholesale Snack Distributor</u> Foreign, mostly male middle age – 1	<u>No Special Characteristics</u> – 5
<u>Used Clothing</u> Women, men, some young children – 1	

7. What form of transportation do your customers use? Total Responses 23

	100% to 76%	75% to 51%	50% to 26%	25% to 0%
Public Transportation	1	1	3	9
Walk	4	2	3	8
Bike	0	0	0	4
Car	6	2	7	5

8. What have been your sales trends over the past year? Total Responses 22

Keeping up with inflation 14 Declining 5 Growing 3

- If growing or declining, to what do you attribute this change?
Reasons for declining – The economy/recession 2, RDA 1
Reasons for growing – Word of mouth

9. Within the next 24 months, what do you plan to do? Total Responses 23

Expand 10 Stay about the same 10 Downsize or close business 2 Other:
Don't know 1

If planning any changes, why?

- Reasons for expansion
 - a. Would like to add parking lot
 - b. Expand to make a more friendly place for customers to eat and enjoy
 - c. Seeking more contracts, increase sales
 - d. plan to remodel
- Reasons for downsizing or closing
 - a. RDA taking property

10. Do you own or lease your retail space? Total Responses 23

Own 13 Lease 10

11. Have there been any recent changes in the area that are beneficial to your business? Total Responses 20
 No 15 No, but hopeful 2 Yes 2 Don't know 1
12. Are there any issues in the surrounding area that have a negative impact on your business? Total Responses 14
- Are they being addressed?
 - a) Kids fighting coming out of school
 - b) Dropouts smoking in my restaurant, afraid of retaliation if call police
 - c) RDA business and people relocation
 - d) Drugs
 - e) Lack of parking
 - f) Stop & Go's a problem
 - g) Deteriorated streets and sidewalks
 - h) Nuisance dumping in vacant building and lots
 - i) Automobile break-ins/thefts
13. Is parking an issue for your business? Total Responses 22: Yes 9 No 13
- Is it adequate for your customers? Yes 14 No 4
 - Where do your customers park? On the street
 - Where do your employees park? On the street
14. What types of activities do you think would help improve your business? Total Responses 21

11	Physical improvements to neighborhood streets (lighting, trashcans, improved sidewalks)
15	Improved maintenance/cleanliness
13	Coordinated promotional activities by businesses
6	More parking
13	Accessibility to financing for your business
12	Addition of businesses that would complement the services or products you supply
11	Better police patrolling/response time
9	Affordable facade improvement program
10	Better street signage
13	Support and advice on how to strengthen business management and improve profitability
12	Information on and access to funding to improve energy efficiency and reduce utility costs

Nicetown CDC Commercial Corridor Plan

Community Shopping Survey

Maisha Jackson

October 12, 2011

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Overview

With the support of the Philadelphia Commerce Department the Nicetown CDC is developing a commercial corridor revitalization strategy that will:

- 1) Increase the economic viability of the Germantown Avenue commercial corridor;
- 2) Enable existing neighborhood-serving businesses to grow and stay in the community;
- 3) Enhance the businesses mix to meet the needs of the community and creates jobs, particularly for residents;
- 4) Encourage greater public and private investment to improve the physical and business environment;
- 5) Support activities on the commercial corridor to contribute to an enhanced quality of life for neighborhood residents and merchants by improving safety and cleanliness, and strengthening the sense of community;
- 6) Implement improvements to benefit existing residents and merchants by providing them access to affordable goods and services, employment, and cultural gathering places; and
- 7) Promote neighborhood residents', merchants', and community groups' leadership and activities to contribute to increased civic participation in the neighborhood.

This document is intended to present data and findings that will influence, and be incorporated into the revitalization strategy's final report.

Citizen Input

In order to gain citizen input in the planning process, Nicetown CDC convened a community wide meeting on September 15, 2011 to discuss the community's commercial corridor, and solicit resident concerns and preferences for strengthening the neighborhood's retail/commercial assets. The meeting was advertised through the NicetownNAC network of Block Captains and attracted 70 participants and 64 completed a nine question Community Shopping Survey. During the week of September 26, 2011 NicetownNAC staff administered 16 additional surveys to individuals who came to the Nicetown Community Center for service to achieve a survey sample that more closely resembled the neighborhood's overall age distribution profile, resulting in a total sample of 80 Nicetown residents. Community residents and leaders who have reviewed survey results feel confident they present an accurate picture of resident preferences.

The community meeting was led by Nicetown CDC Chief Operating Officer Majeedah Rashid. Maisha Jackson, consultant, described the goals and objectives of the project and presented the Consumer Shopping Survey.

Residents expressed general dissatisfaction with the commercial corridor and cited lack of adequate shopping and service opportunities, absence of restaurant and entertainment options, and safety.

Additional comments included:

	Number of Similar Comments
<ul style="list-style-type: none"> I am a comparison shopper. Get coffee at McDonald’s and Dunkin Donuts, fresh food at Reading Terminal. Groceries—best coupon deals get my attention, wherever. 	2
<ul style="list-style-type: none"> Because I am a bargain/comparison shopper and there are few close locations, I travel throughout Philadelphia. 	5
<ul style="list-style-type: none"> I shop around for clothing and shoes. 	1
<ul style="list-style-type: none"> Our neighborhood businesses don’t put money back into the community. 	2
<ul style="list-style-type: none"> We need more trash cans around 15th and Erie Avenue to 21st and Erie Avenue. The 3600 block of Germantown Avenue needs to be clean, too dirty. Store owners need to clean up in front of their businesses. Erie and Germantown Avenue looks nasty and dirty. 	1
<ul style="list-style-type: none"> I would like to see healthy food choices: panera, nice restaurants, Shoprite. Also stores need to hire from within the community and train workers in customer service—especially attitudes. 	1
<ul style="list-style-type: none"> We need a high school uniform school nearby. 	1
<ul style="list-style-type: none"> We need more stores in the community that we go out of the community for. 	1

Survey Analysis

Critical Findings

- More than two thirds (62 percent) of respondents report they regularly shop, visit or do business on Germantown Avenue.
- Most respondents (42 percent) usually walk to Germantown Avenue. Roughly equal numbers drive or take public transportation (30 percent drive, 27 percent public transit).
- Residents generally feel safe on the commercial corridor during daylight hours.

- Commercial corridor businesses are used by area residents for limited convenience goods and services purchases.
- Residents would like to see the commercial corridor reshaped to create a welcoming and entertaining town center that offers healthful recreation, socialization and shopping opportunities.
- Residents are not interested in increasing alcohol sales in the community.
- Most Nicetown residents travel more than five miles to purchase retail goods.

Respondent Characteristics

Eighty Nicetown residents completed the Consumer Shopping Survey. Women are overrepresented in the survey sample with women representing approximately three fourths (74 percent) of respondents and males representing only one fourth (24 percent male and two percent non responses), compared to the 2010 Census estimate of the 55 percent female and 45 percent male. Older community residents are also overrepresented in the survey sample and Nicetown CDC leadership has acknowledged new strategies will have to be developed to reach younger residents in the community.

Survey Age Distribution			
	Number	Survey Percent of Total	2010 Census Percent of Total
19 to 20	2	3%	8%
20 to 30	13	16%	14%
31 to 40	12	15%	10%
41 to 50	6	8%	14%
51 to 60	11	14%	15%
61+	35	44%	18%
No Response	1	1%	0%
Total	80		

Shopping Frequency

More than two thirds (62 percent) of respondents report they regularly shop, visit or do business on Germantown Avenue—from one to seven times per week, clearly indicating the community-serving nature of the corridor.

Shopping Frequency		
	Number	Survey Percent of Total
5 to 7 times per week	11	14%

Shopping Frequency		
	Number	Survey Percent of Total
2 to 4 times per week	20	25%
1 time per week	18	23%
Less than 1 time per week	22	28%
Never	6	8%
No Response	3	4%
Total	80	

Transportation & Parking

Most respondents (42 percent) usually walk to Germantown Avenue. Roughly equal numbers drive or take public transportation (30 percent drive, 27 percent public transit). Only one respondent reported regularly traveling to the commercial corridor by bicycle. Half of the respondents who drive reported they frequently have trouble finding parking when they drive to Germantown Avenue for shopping or other purposes.

Mode of Transportation		
	Number	Survey Percent of Total
Car	29	30%
Public transportation	26	27%
Walk	41	42%
Bike	1	1%
Total	97	

Frequency of Parking Difficulty		
	Number	Survey Percent of Total
Frequently	22	50%
Rarely	15	34%
Never	7	16%
Total	44	

Safety Perceptions

While the greater majority of respondents (79 percent) of respondents feel very safe or somewhat safe on Germantown Avenue during the day, only about half as many (42 percent) have the same level of comfort at night.

Perceived Day Safety			Perceived Nighttime Safety		
	Number	Survey Percent of Total		Number	Survey Percent of Total
Very safe	24	30%	Very safe	6	8%
Somewhat Safe	39	49%	Somewhat Safe	31	39%
Not very safe	8	10%	Not very safe	22	28%
Not at all safe	2	3%	Not at all safe	6	8%
No response	7	9%	No response	15	19%
Total	80		Total	80	

Business & Services Attraction Goals

Most residents use Germantown Avenue businesses to meet some of their day-to-day convenience shopping and service needs. The leading five retail services currently used include carry out food, beauty supply, hardware, groceries and drugstore purchases.

Goods and Services Purchased/Used on Germantown Avenue		Number of Responses	Survey Percent of Total
1	Carry out food	48	13%
2	Beauty supply	36	10%
3	Hardware store	30	8%
4	Groceries	28	8%
5	Drug store	27	7%
6	Hair/nail salon/barbershop	27	7%
7	Thrift store	25	7%
8	Bank	21	6%
9	Laundromat	20	6%
10	Dry cleaner	19	5%
11	Medical services	17	5%
12	Shoe repair	14	4%
13	Bars and lounges	12	3%
14	Computers and electronics	10	3%
15	Gasoline	10	3%
16	Auto repair	7	2%
17	Contractors/home repair	4	1%
18	Child day care	3	1%
19	Real estate services	3	1%
	Total Responses	361	

Respondent preference for the types of stores and services they would like to see increased or added on the Avenue indicate a desire to see a much fuller, family-friendly array of products and

services. The leading categories, family entertainment, book stores, dance/fitness classes, fruits and vegetables, indicate a desire for the commercial corridor to be reshaped to create a welcoming and entertaining town center that offers healthful recreation, socialization and shopping opportunities. Generally, respondents would like to see more of their daily convenience, shopping and entertainment needs met in their neighborhood.

WOULD LIKE TO SEE MORE IN THE NEIGHBORHOOD AND WOULD USE THEM			
Stores and Services		Number of Responses	Percent of Total Surveyed
1	Family entertainment place, such as skate park, bowling	60	75%
2	Book stores	58	73%
3	Dance/fitness classes	57	71%
4	Fruits & vegetables	56	70%
5	Dollar stores & other general merchandise stores	56	70%
6	Bakeries	55	69%
7	Health food store	48	60%
8	Full service, sit down restaurant	47	59%
9	Drug stores/pharmacies	45	56%
10	Copying & printing	45	56%
11	Children's clothing	45	56%
12	Groceries	44	55%
13	Gift / card store	43	54%
14	Women's clothing	43	54%
15	Laundry, dry cleaning	43	54%
16	Legal/accounting	43	54%
17	Medical/dental services	42	53%
18	Cultural event/meeting place	42	53%
19	Live music establishments	42	53%
20	Men's clothing	41	51%
21	Housewares	40	50%
22	Radio/TV/electronics	40	50%
23	Shoe stores	40	50%
24	Clothing accessories	40	50%
25	Spa/beauty salon	38	48%
26	Furniture	34	43%
27	Music store	33	41%
28	Pet supplies	32	40%
29	Optical stores	31	39%
30	Convenience stores	29	36%

WOULD LIKE TO SEE MORE IN THE NEIGHBORHOOD AND WOULD USE THEM			
Stores and Services		Number of Responses	Percent of Total Surveyed
31	Cosmetics & beauty supplies	28	35%
32	Garden supplies	27	34%
33	Bike shop	27	34%
34	Auto parts & accessories	24	30%
35	Liquor store/beer distributor	12	15%
36	Bars and lounges	7	9%
	Total	1,437	

While fewer residents expressed opposition to specific categories of stores and services, greatest opposition was expressed toward increasing alcohol sales in the community. Some opposed uses seem inconsistent with preferred new uses, and may be a reflection of the sample's over representation of more mature and female respondents.

DON'T WANT TO SEE MORE IN THE NEIGHBORHOOD			
Stores and Services		Number of Responses	Percent of Total Surveyed
1	Liquor store/beer distributor	31	39%
2	Bars and lounges	28	35%
3	Auto parts & accessories	19	24%
4	Bike shop	17	21%
5	Convenience stores	14	18%
6	Pet supplies	12	15%
7	Men's clothing	12	15%
8	Cosmetics & beauty supplies	11	14%
9	Garden supplies	11	14%
10	Live music establishments	11	14%
11	Children's clothing	10	13%
12	Furniture	10	13%
13	Spa/beauty salon	10	13%
14	Music store	9	11%
15	Women's clothing	9	11%
16	Legal/Accounting	9	11%
17	Laundry, dry cleaning	9	11%
18	Clothing Accessories	8	10%
19	Optical stores	8	10%
20	Copying & printing	8	10%

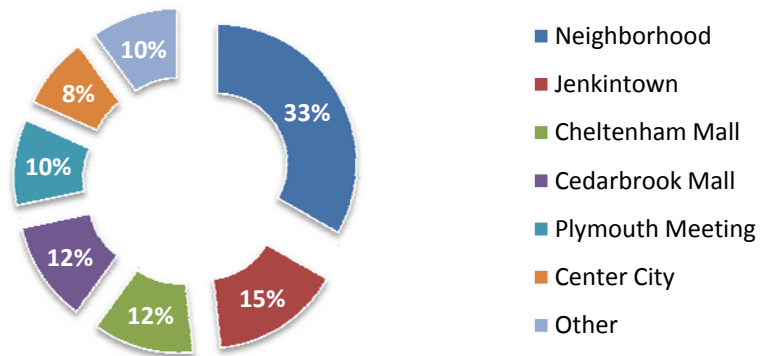
DON'T WANT TO SEE MORE IN THE NEIGHBORHOOD			
Stores and Services		Number of Responses	Percent of Total Surveyed
21	Gift / card store	7	9%
22	Radio/TV/Electronics	7	9%
23	Dollar stores & other general merchandise stores	7	9%
24	Shoe stores	7	9%
25	Housewares	6	8%
26	Drug stores/pharmacies	6	8%
27	Bakeries	6	8%
28	Cultural event/meeting place	6	8%
29	Groceries	4	5%
30	Health food store	4	5%
31	Book stores	4	5%
32	Medical/dental services	3	4%
33	Full service, sit down restaurant	3	4%
34	Fruits & vegetables	3	4%
35	Dance/fitness classes	2	3%
36	Family entertainment place, such as skate park, bowling	0	0%
Total		331	

Where Residents Currently Shop

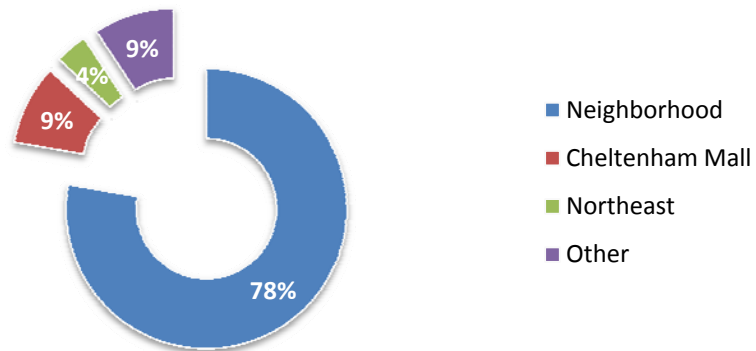
Eating and Drinking Places

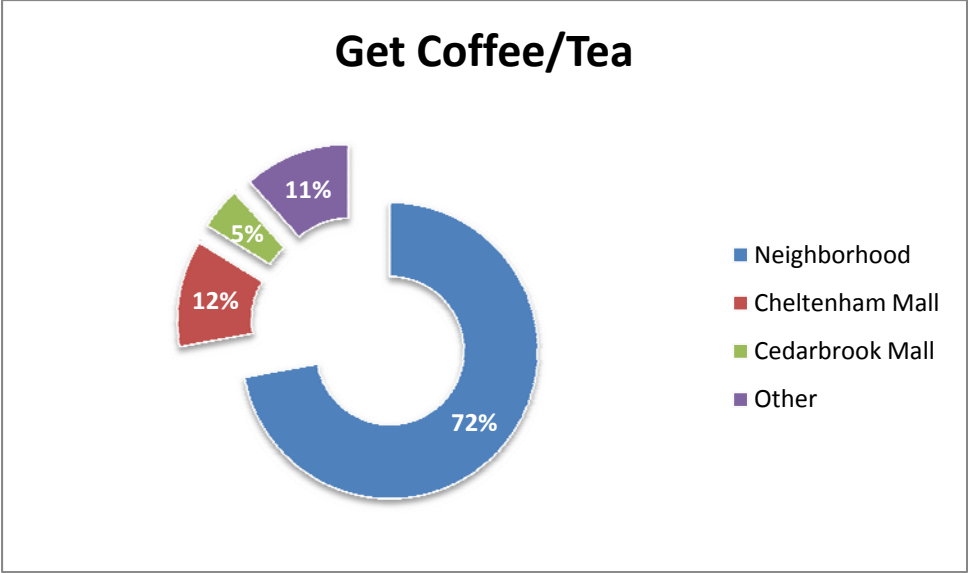
Residents purchase most takeout food and casual coffee/tea outings in the community's limited number of eating establishments, however, respondents travel throughout the nearby region for restaurant dining. Most Nicetown spending for these uses occurs five to six miles out of the neighborhood.

Restaurant Dining



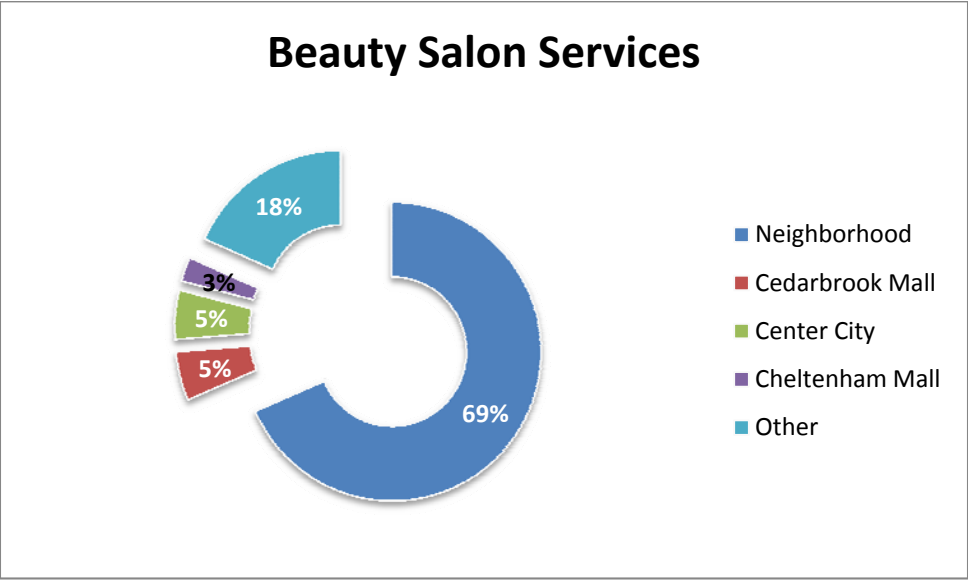
Take Out Food Purchases



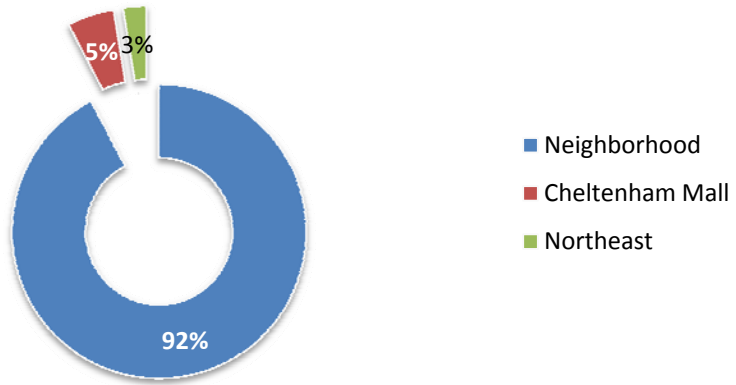


Service Establishments

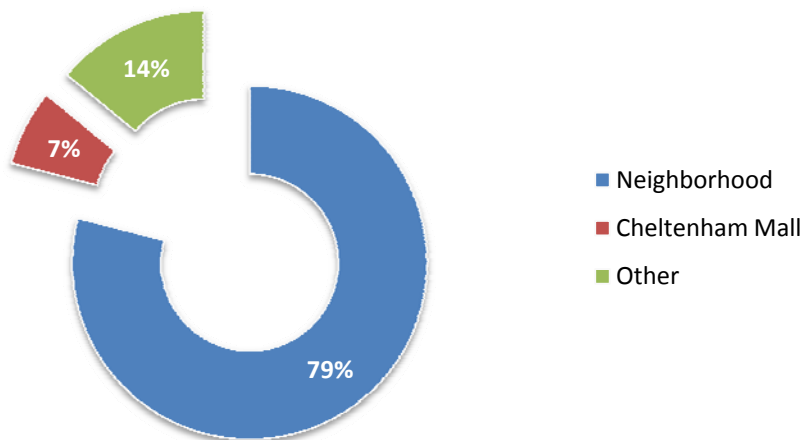
Beauty salon, laundry and dry cleaning service needs are typically met in the neighborhood, but approximately half of residents travel outside the community to do their banking and purchase duplicating and fax services.



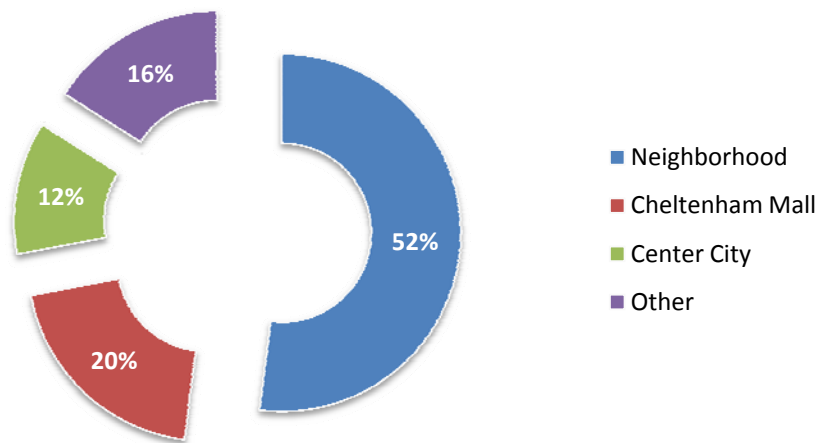
Laundromat Services



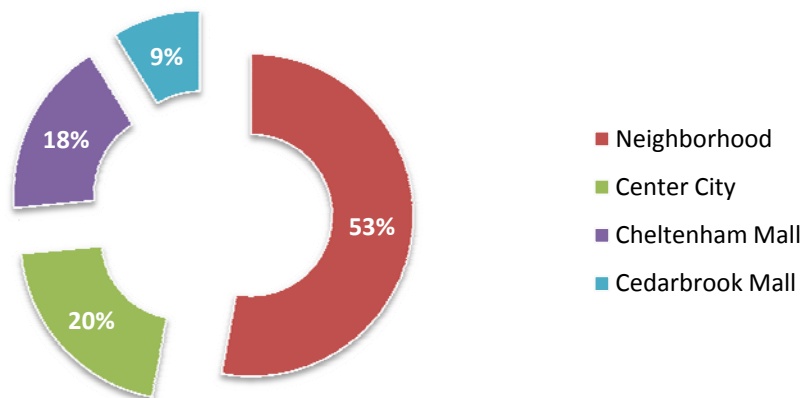
Dry Cleaning Services



Banking Services

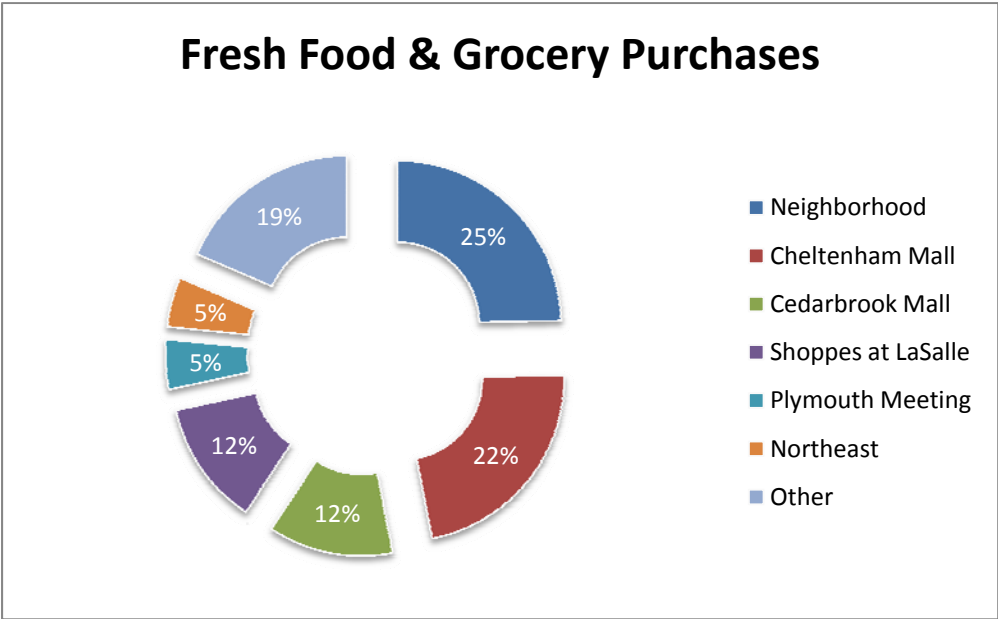


Copying, Duplicating & Fax Services

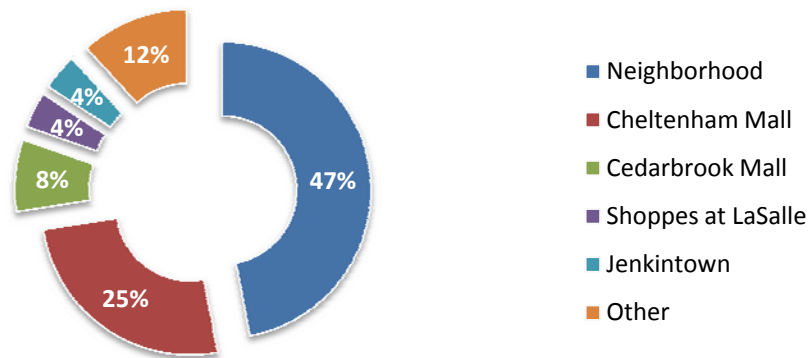


Retail and Wholesale Establishments

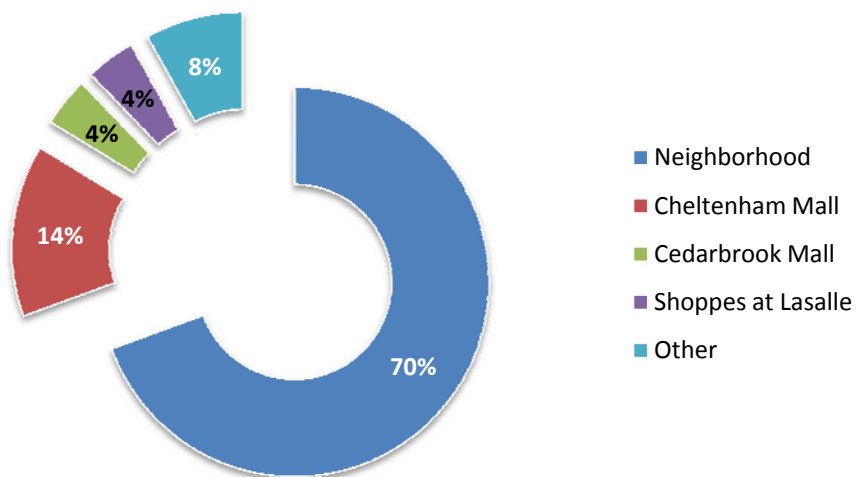
With the exception of prescriptions drug purchases, no resident retail shopping need is effectively captured (more than 50 percent) in the community. Most Nicetown spending for these uses occurs five to six miles out of the neighborhood. While this deficit must be reviewed in the context of competition from nearby discount shopping centers and big box stores at Cedarbrook and Cheltenham Malls, as well as constraints offered by the size and ownership of the corridor’s commercial properties, a diligent business attraction strategy should result in enhanced capture of resident expenditures.



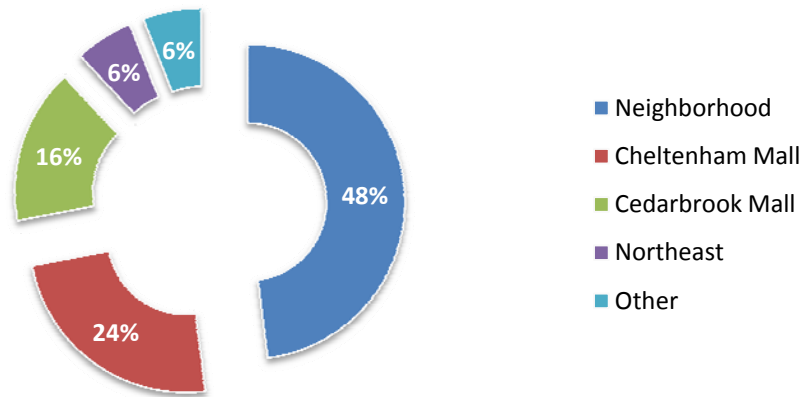
Bakery Purchases



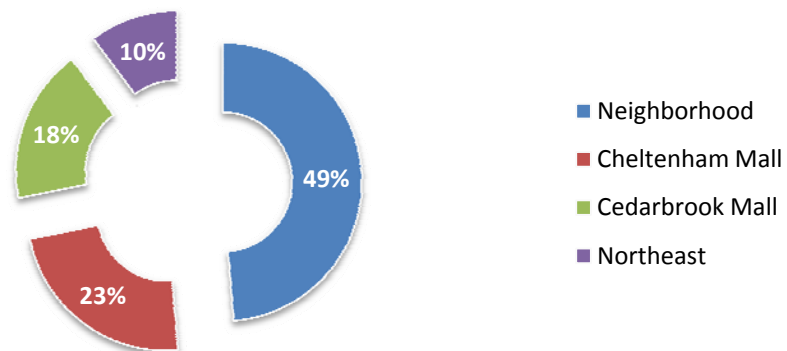
Prescription Medicine Purchases



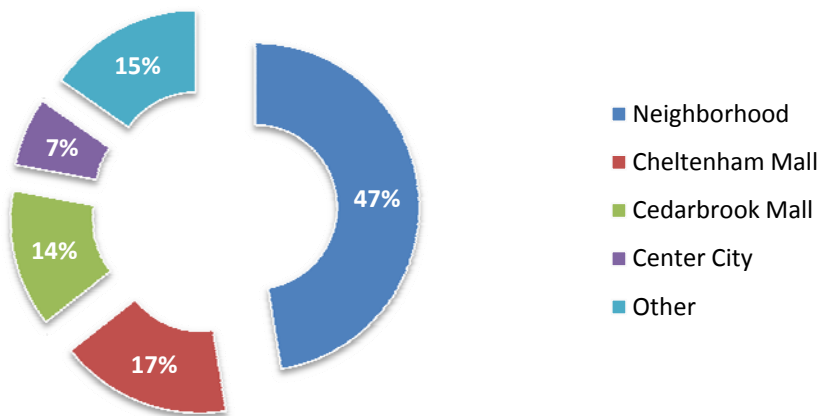
Personal Care/Cleaning Purchases



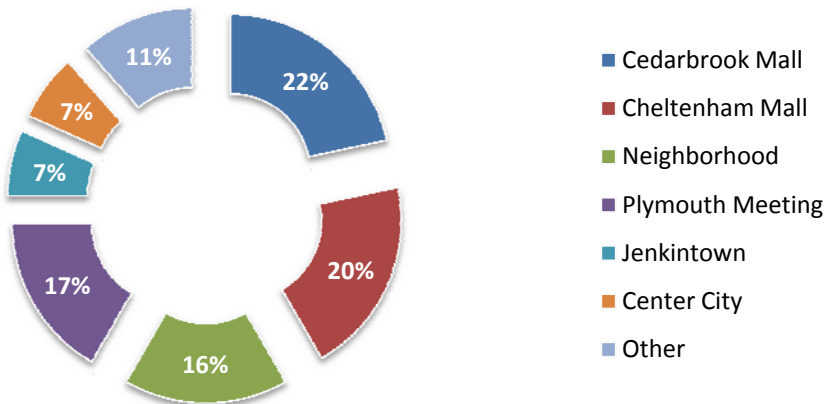
Hardware, Tools & Home Improvement Purchases



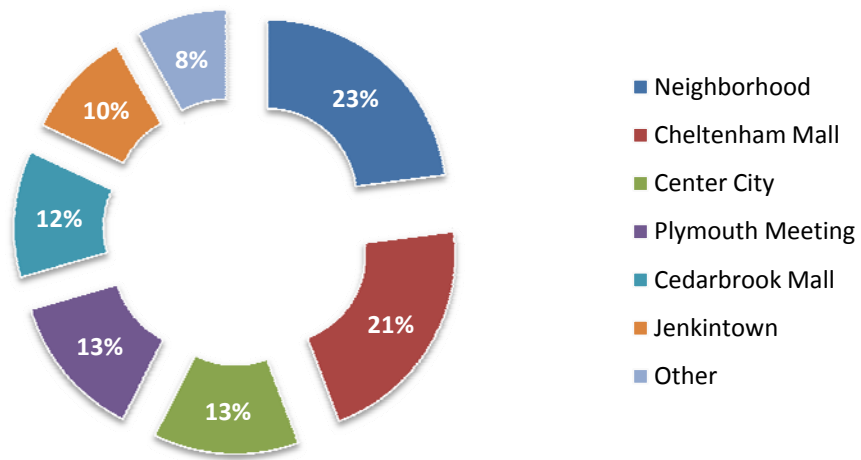
Greeting Card & Gift Purchases



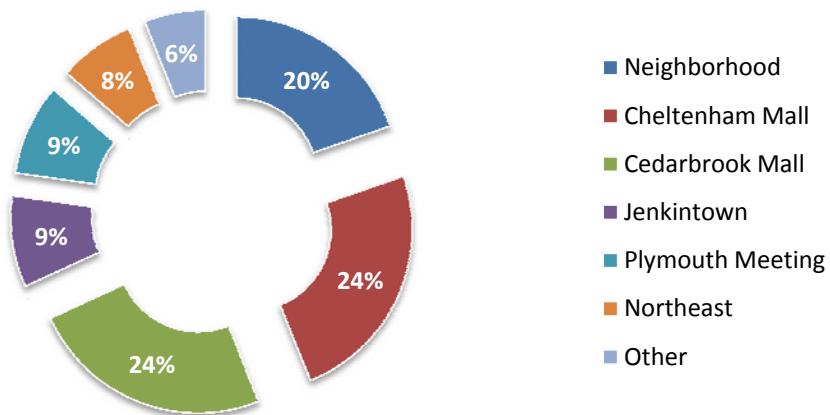
Clothing Purchases



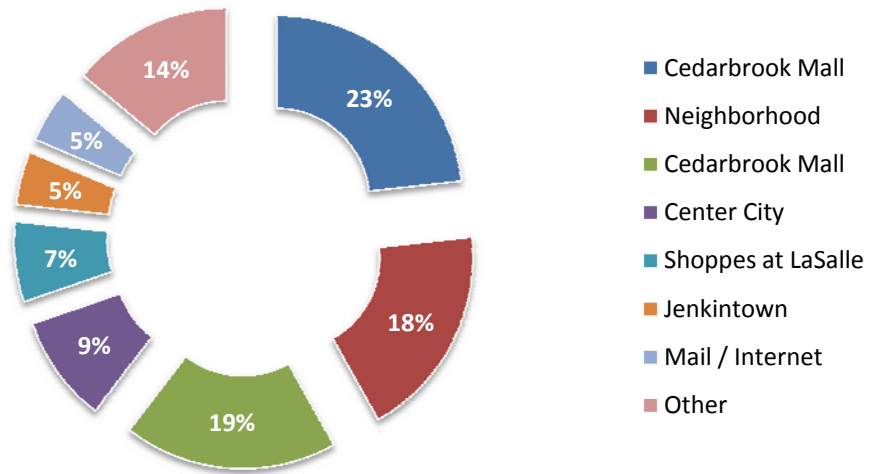
Shoe Purchases



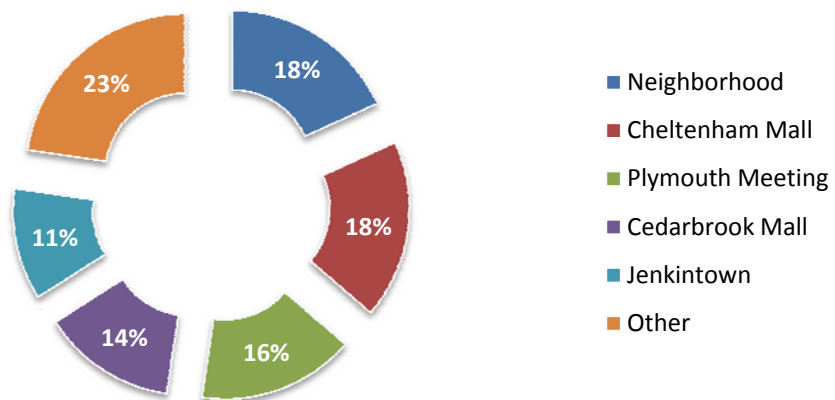
Housewares & Home Decorating Purchases



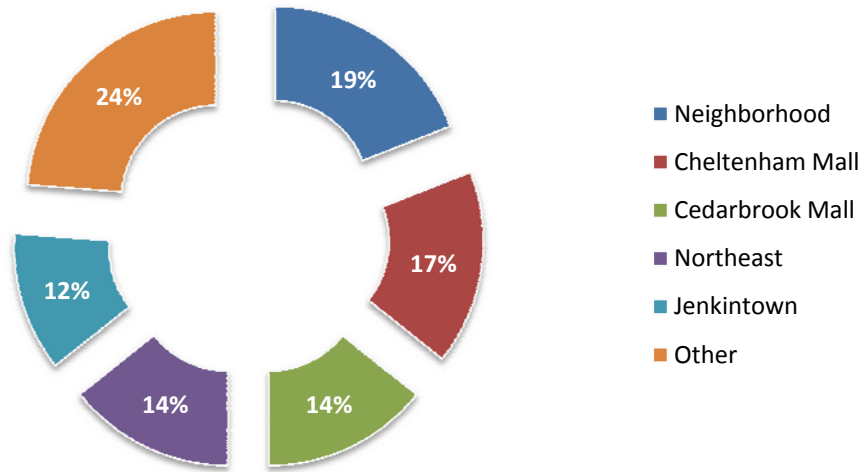
Electronics Purchases



Furniture Purchases



Appliance Purchases



Resident Shopping Patterns

RESIDENT SHOPPING PATTERNS		Total Responses	Neighborhood	Cheltenham Mall	Cedarbrook Mall	Shoppes at LaSalle	Jenkintown	Plymouth Meeting	Center City	Chestnut Hill	Roxborough	Northeast	City Line Avenue	Roxborough
Eating and Drinking Places														
1	Restaurant dining	60	20	7	7	0	9	6	5	1	0	2	2	0
			33.3%	11.7%	11.7%	0.0%	15.0%	10.0%	8.3%	1.7%	0.0%	3.3%	3.3%	0.0%
2	Take-out food	54	42	5	1	1	1	0	0	1	1	2	0	0
			77.8%	9.3%	1.9%	1.9%	1.9%	0.0%	0.0%	1.9%	1.9%	3.7%	0.0%	0.0%
3	Get coffee/tea	43	31	5	2	0	1	1	1	0	0	1	0	0
			72.1%	11.6%	4.7%	0.0%	2.3%	2.3%	2.3%	0.0%	0.0%	2.3%	0.0%	0.0%
Service Establishments														
4	Beauty salon	38	26	1	2	1	0	0	2	0	0	0	0	0
			68.4%	2.6%	5.3%	2.6%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Laundromat	39	36	2	0	0	0	0	0	0	0	1	0	0
			92.3%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%
6	Dry cleaning	43	34	3	1	0	1	0	1	0	0	1	1	0
			79.1%	7.0%	2.3%	0.0%	2.3%	0.0%	2.3%	0.0%	0.0%	2.3%	2.3%	0.0%
7	Banking services/ATM	50	26	10	2	0	1	1	6	0	0	2	1	1
			52.0%	20.0%	4.0%	0.0%	2.0%	2.0%	12.0%	0.0%	0.0%	4.0%	2.0%	2.0%
8	Copying, duplicating and faxes	39	18	6	3	1	1	1	7	1	0	1	0	0
			46.2%	15.4%	7.7%	2.6%	2.6%	2.6%	17.9%	2.6%	0.0%	2.6%	0.0%	0.0%

RESIDENT SHOPPING PATTERNS		Total Responses	Glenwood	Lawncrest	North Phila	Frankford	Mail / Internet	Willow Grove	South Phila	New Jersey	Olney	Southwest	West Phila
Eating and Drinking Places													
1	Restaurant dining	60	0	0	0	0	0	1	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Take-out food	54	0	0	0	0	0	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Get coffee/tea	43	0	0	0	0	0	1	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Service Establishments													
4	Beauty salon	38	0	0	2	0	0	0	2	0	0	0	2
			0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	5.3%
5	Laundromat	39	0	0	0	0	0	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Dry cleaning	43	0	0	0	0	0	0	0	0	0	0	1
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%
7	Banking services/ATM	50	0	0	0	0	0	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8	Copying, duplicating and faxes	39	0	0	0	0	0	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

RESIDENT SHOPPING PATTERNS		Total Responses	Neighborhood	Cheltenham Mall	Cedarbrook Mall	Shoppes at LaSalle	Jenkintown	Plymouth Meeting	Center City	Chestnut Hill	Roxborough	Northeast	City Line Avenue
Retail/Wholesale Establishments													
9	Fresh food and groceries	81	20	18	10	10	4	4	2	0	0	4	0
			24.7%	22.2%	12.3%	12.3%	4.9%	4.9%	2.5%	0.0%	0.0%	4.9%	0.0%
10	Bakery	51	24	13	4	2	2	1	1	0	0	0	0
			47.1%	25.5%	7.8%	3.9%	3.9%	2.0%	2.0%	0.0%	0.0%	0.0%	0.0%
11	Prescription medicines	49	34	7	2	2	1	0	1	0	0	0	0
			69.4%	14.3%	4.1%	4.1%	2.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
12	Personal care (soap, shampoo), household cleaning items	50	24	12	8	0	1	1	0	0	0	3	0
			48.0%	24.0%	16.0%	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%	6.0%	0.0%
13	Hardware, tools and home improvement items	42	19	9	7	1	1	1	0	0	0	4	0
			45.2%	21.4%	16.7%	2.4%	2.4%	2.4%	0.0%	0.0%	0.0%	9.5%	0.0%
14	Greeting cards & gifts	59	28	10	8	0	3	6	4	0	0	0	0
			47.5%	16.9%	13.6%	0.0%	5.1%	10.2%	6.8%	0.0%	0.0%	0.0%	0.0%
15	Clothing	60	10	12	13	1	4	10	4	0	0	3	0
			16.7%	20.0%	21.7%	1.7%	6.7%	16.7%	6.7%	0.0%	0.0%	5.0%	0.0%
16	Shoes	61	14	13	7	1	6	8	8	0	0	2	0
			23.0%	21.3%	11.5%	1.6%	9.8%	13.1%	13.1%	0.0%	0.0%	3.3%	0.0%
17	Housewares (utensils) & home decorating	66	13	16	16	1	6	6	1	0	0	5	1
			19.7%	24.2%	24.2%	1.5%	9.1%	9.1%	1.5%	0.0%	0.0%	7.6%	1.5%
18	Electronics (computer, etc.)	43	8	8	10	3	2	3	4	0	0	1	0
			18.6%	18.6%	23.3%	7.0%	4.7%	7.0%	9.3%	0.0%	0.0%	2.3%	0.0%
19	Furniture	44	8	8	6	1	5	7	1	0	0	1	0
			18.2%	18.2%	13.6%	2.3%	11.4%	15.9%	2.3%	0.0%	0.0%	2.3%	0.0%
20	Appliances (refrigerator, stove, etc.)	42	8	7	6	1	5	4	1	0	0	6	0
			19.0%	16.7%	14.3%	2.4%	11.9%	9.5%	2.4%	0.0%	0.0%	14.3%	0.0%

RESIDENT SHOPPING PATTERNS			Total Responses	Glenwood	Lawncrest	North Phila	Frankford	Mail / Internet	Willow Grove	South Phila	New Jersey	Olney	South-west	West Phila
Retail/Wholesale Establishments														
9	Fresh food and groceries	81	1	0	0	0	0	1	2	0	0	4	0	0
			1.2%	0.0%	0.0%	0.0%	1.2%	2.5%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%
10	Bakery	51	0	0	2	0	0	1	0	0	1	0	0	0
			0.0%	0.0%	3.9%	0.0%	0.0%	2.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
11	Prescription medicines	49	0	0	0	0	0	0	0	0	0	0	0	2
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%
12	Personal care (soap, shampoo), household cleaning items	50	0	0	0	0	0	0	0	0	1	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
13	Hardware, tools and home improvement items	42	0	0	0	0	0	0	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
14	Greeting cards & gifts	59	0	0	0	0	0	0	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
15	Clothing	60	0	0	0	0	2	1	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	3.3%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
16	Shoes	61	0	0	0	0	1	0	0	0	0	0	0	1
			0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
17	Housewares (utensils) & home decorating	66	0	0	0	0	0	1	0	0	0	0	0	0
			0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
18	Electronics (computer, etc.)	43	0	1	0	0	2	1	0	0	0	0	0	0
			0.0%	2.3%	0.0%	0.0%	4.7%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
19	Furniture	44	0	0	0	0	1	1	2	0	0	0	2	1
			0.0%	0.0%	0.0%	0.0%	2.3%	2.3%	4.5%	0.0%	0.0%	4.5%	2.3%	2.3%
20	Appliances (refrigerator, stove, etc.)	42	0	0	0	1	1	0	0	0	0	0	1	1
			0.0%	0.0%	0.0%	2.4%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	2.4%

