

NORTHERN LIBERTIES

Business Improvement District

2022 Needs Assessment Survey Report

2022 RESPONSES

149 respondents (choose one)
69% Residents
10% Visitors
6.7% Business Owner within current boundaries
4% Commercial Property Owners
3.4% Employees

Of 22 Business Owners

41% rent
41% own
22% misc responses (four people)

Of 115 Residents

29.6% rent
69.6% own

Of Visitors or Employees

24% are in 19123 (Northern Liberties)
17% are in 19125 (Fishtown)
14% are in 19122 (Kensington)
14% are in 19147 (East Passyunk)

2017 RESPONSES

333 respondents (all that apply)
67% Residents
14% Visitors
17% Business Owner within current boundaries
8.4% Commercial Property Owners
22% Employees

Of 77 Business Owners

61% rent
30% own
17% misc responses

Question not asked

Of Respondents

85% are in 19123 (Northern Liberties)
No more than seven from another zip

EXECUTIVE SUMMARY

Much has changed in Philadelphia since 2017 when our first needs assessment survey was issued. The NLBID was formed in 2018 to augment, not replace, city services and our funding priorities then reflected a very different world. As the events of the past two and a half years have caused those city services to be interrupted or diminished, the NLBID has had to step in to fill the gap, often doing work it was not expected to have to do. The fact that many of the responses to our 2022 survey are flat and not negative demonstrates our ability to nimbly react in real time to the needs of the community and maintain continuity in service.

In preparation for our next five-year budget, we issued the same survey to gauge how our stakeholders and residents feel about cleanliness, capital projects, safety and more. This document compares the 2017 to the 2022 surveys and makes recommendations for how funds should be allocated beginning in 2023.

Many of the NLBID's current projects – such as the creation of a pedestrian plaza and safer crosswalks at 2nd and Laurel, median improvements on Spring Garden, creating parking under I-95, and the establishment of a farmer's market – track with this survey which indicates that we are already responding to needs as they have evolved.

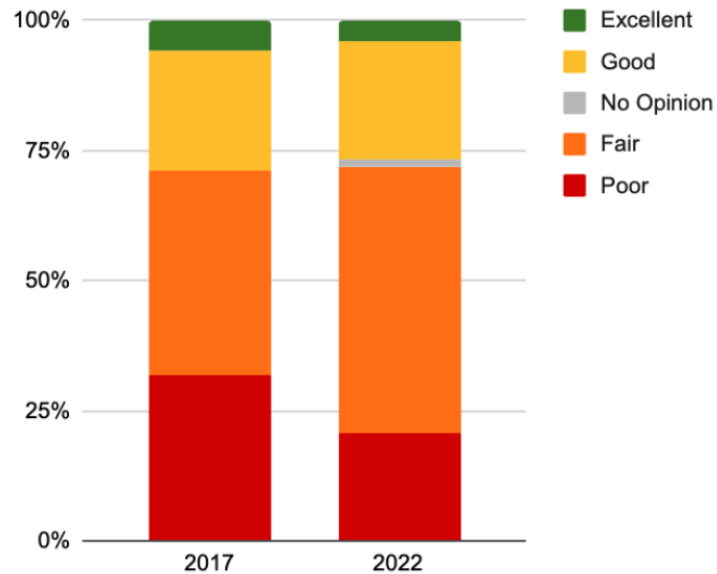
In comparing 2022 results to 2017 results, there were 184 fewer responses, but a more diverse set of stakeholders with a higher percentage being from outside of 19123. Drinking & dining options, walkability and proximity to other neighborhoods remained constant as things people value and like in Northern Liberties.

Most questions about opinions on services remained fairly consistent. Opinions about sidewalk cleanliness saw decent improvement. Perceived daytime safety saw a big shift from mostly fair/good to excellent with perceived nighttime safety slipping a bit. Construction maintenance also improved slightly, though is clearly still a concern.

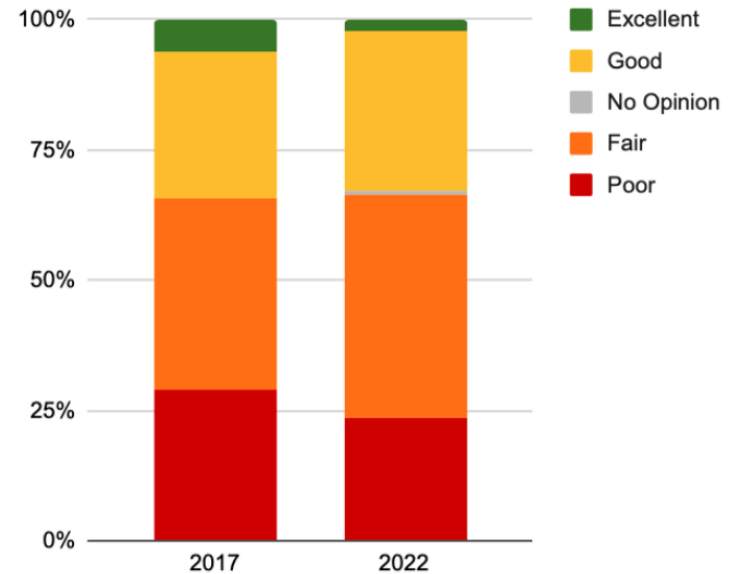
The following pages show side-to-side comparisons in pie chart form from 2017 to 2022 with short summaries explaining those results. This report concludes with a set of recommendations for funding priorities for our next five-year budget.

CLEANLINESS

Sidewalk cleanliness



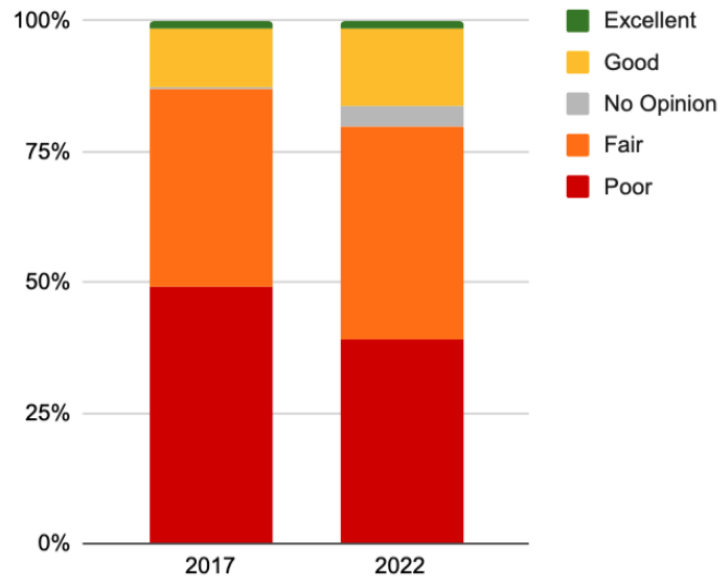
Street cleanliness



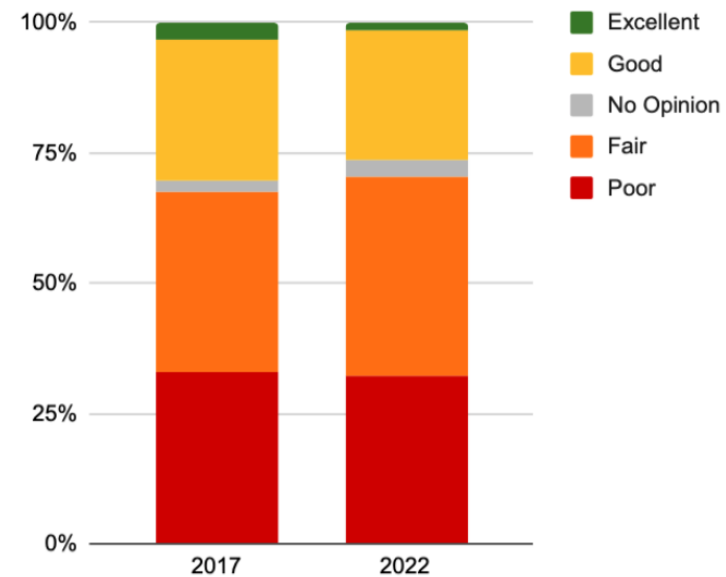
It's heartening to see a decent shift in sentiment about sidewalk cleanliness, as this is the BID's biggest investment. An eleven point drop in "poor" should be commended, though more can be done to attain a higher rating in the future. Likewise, though there is not currently a street sweeping program, the cleaning of inside the curb is pushing the street cleaning rating higher.

MAINTENANCE

Construction site maintenance

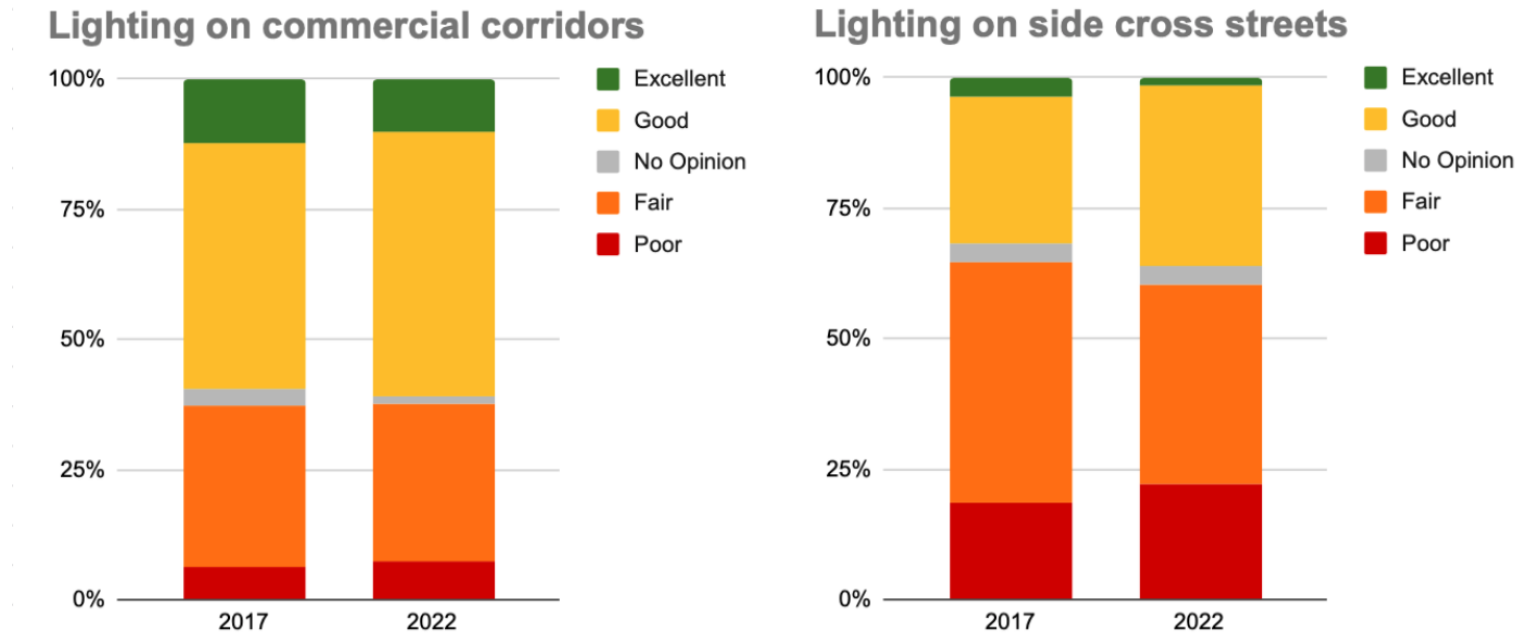


Trash can quantity & maintenance



Sentiment about construction maintenance improved slightly while trash receptacle quantity and conditions remained fairly flat, despite the addition of eighteen cans. Respondents noted in a separate question that more trash cans are their #1 beautification priority. A shift to take-out food during and after COVID lockdowns may be contributing to more need for cans. Clearly, the cans we have need to be repaired and emptied more frequently. Overall, the ratings have room for improvement.

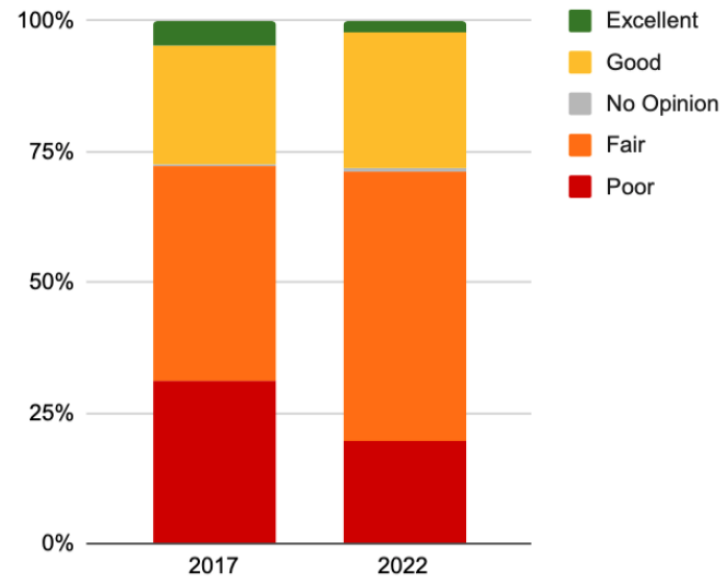
LIGHTING



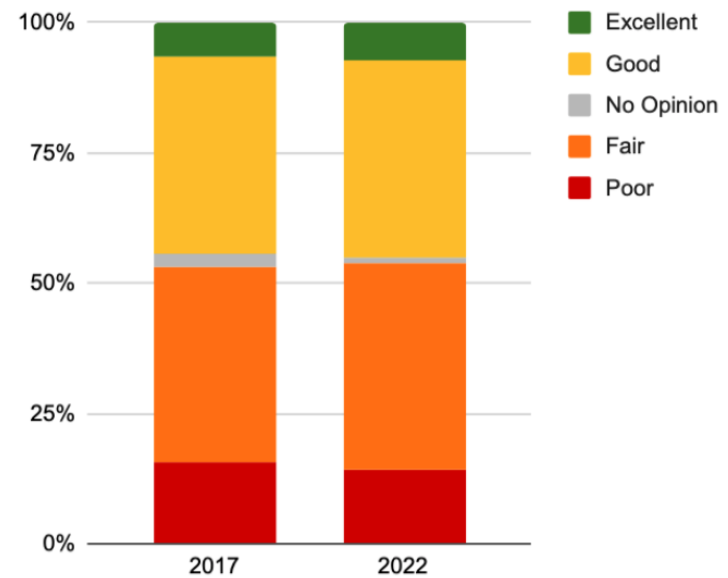
Sentiment about commercial corridor lighting did not change much, as little work has been done on this, but lighting on cross streets saw improvement. It's likely that new construction has contributed to better side street lighting.

SIDEWALKS

Physical sidewalk conditions



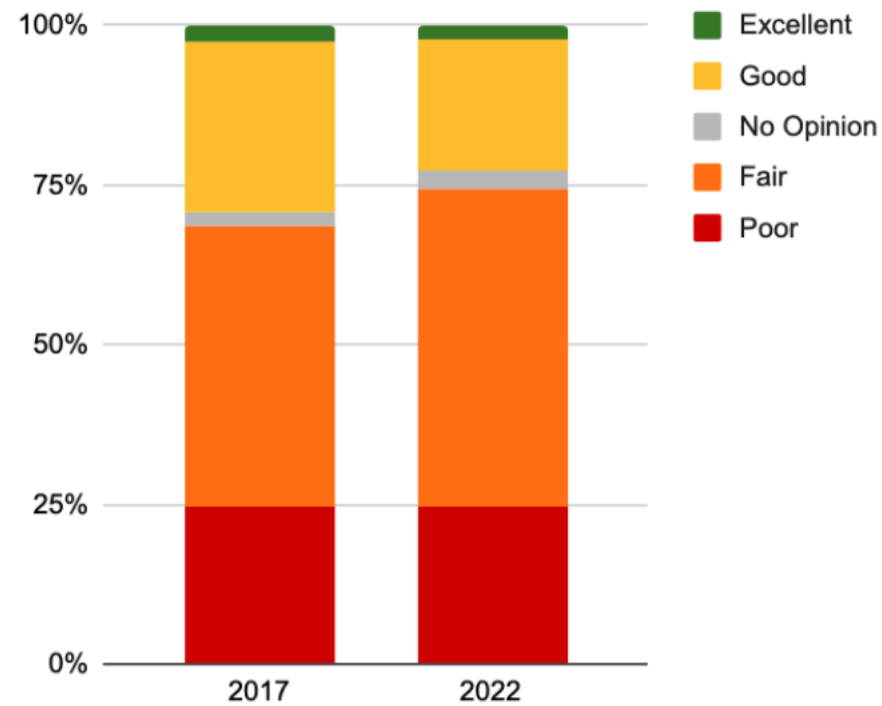
Sidewalk access



Physical sidewalk conditions saw a modest boost which corresponds to the modest work done on repairing them, though access to sidewalks remained pretty much the same. This is likely due to several projects in high-use areas that are still ongoing four years after the initial survey.

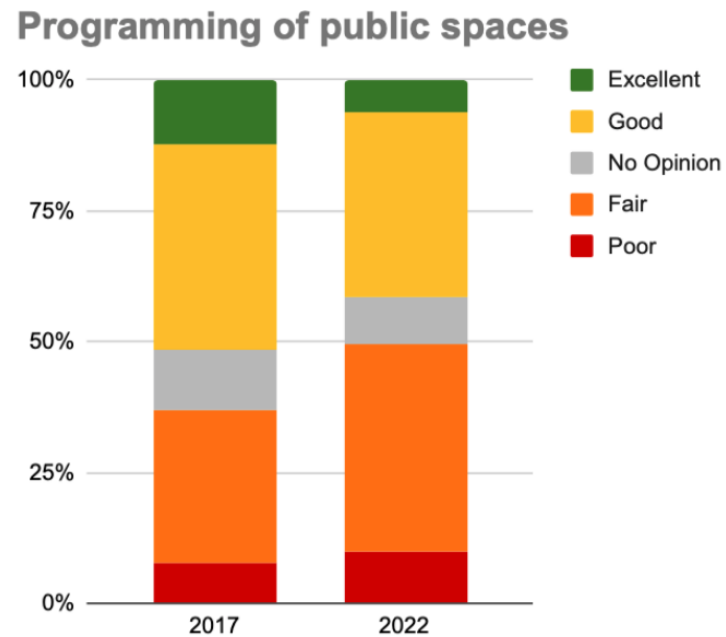
PHYSICAL STREET CONDITIONS (INCLUDING DRAINAGE)

Physical street conditions incl drain



Sentiment about physical street conditions saw a shift down from good to fair. Almost no streets have been paved in Northern Liberties since the 2017 survey and these results hint at their deterioration.

PROGRAMMING OF PUBLIC SPACE



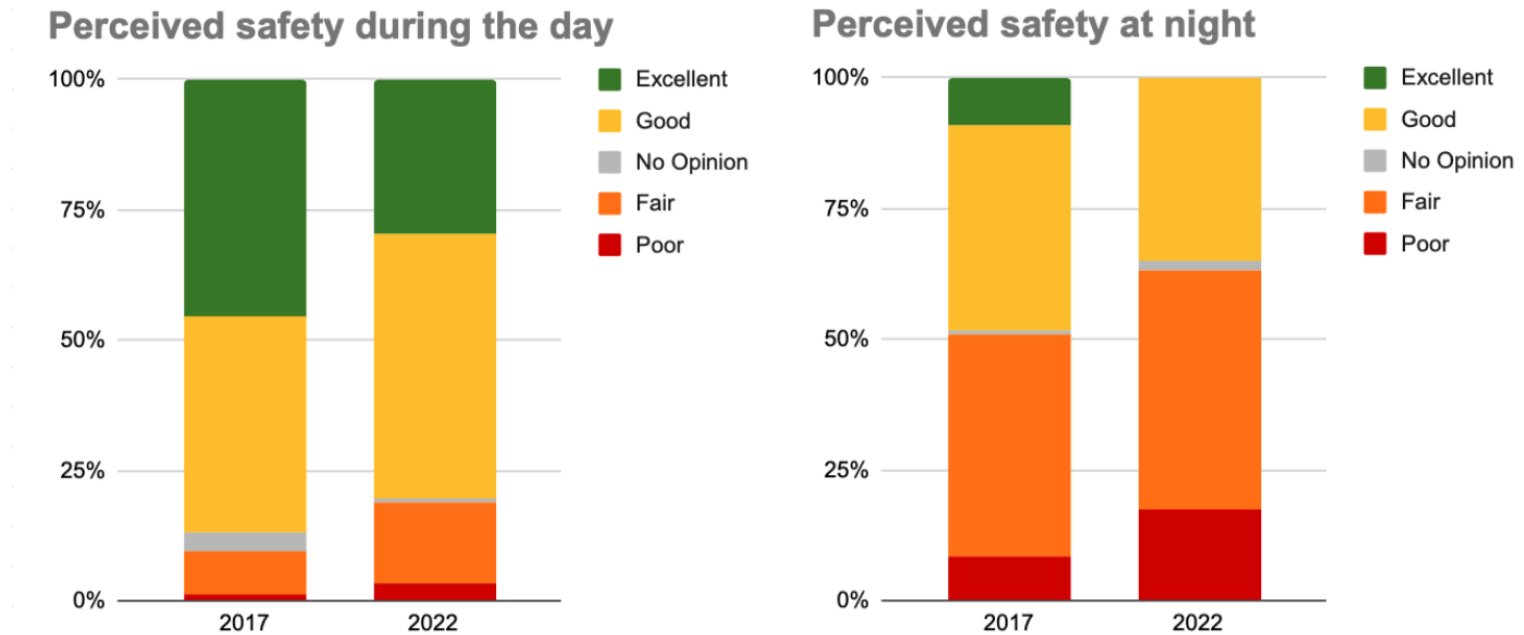
Programming of public space was a casualty of the pandemic and the shift toward “fair” is evidence of that. The shrinkage of “excellent” and the increase of “poor” should be noted. More context is needed to understand why, if not simply because there were fewer events.

PEDESTRIAN SAFETY



Sentiment about pedestrian safety shifted from excellent and good to fair. There are numerous factors behind this, including large construction projects that have blocked many sidewalks, a growing number of double-parked delivery vehicles, streeteries, and a general sense of lawlessness amongst motorists. Much of this is beyond the BID's control, but improved construction site maintenance and the push for intersection improvements such as pedestrian plazas could make a difference.

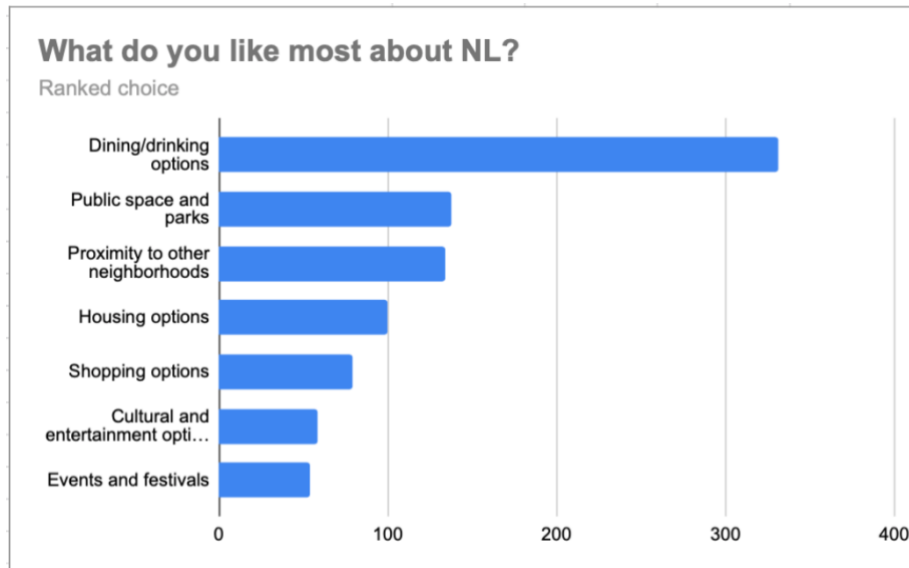
PERSONAL SAFETY



It should come as no surprise that feelings about personal safety have plummeted. While daytime safety is still good, no 2022 respondents felt that nighttime safety is excellent. Some of this is related to lighting, but by in large, it is attributed to a city-wide spike in crime.

WHAT PEOPLE LIKE ABOUT THE NEIGHBORHOOD

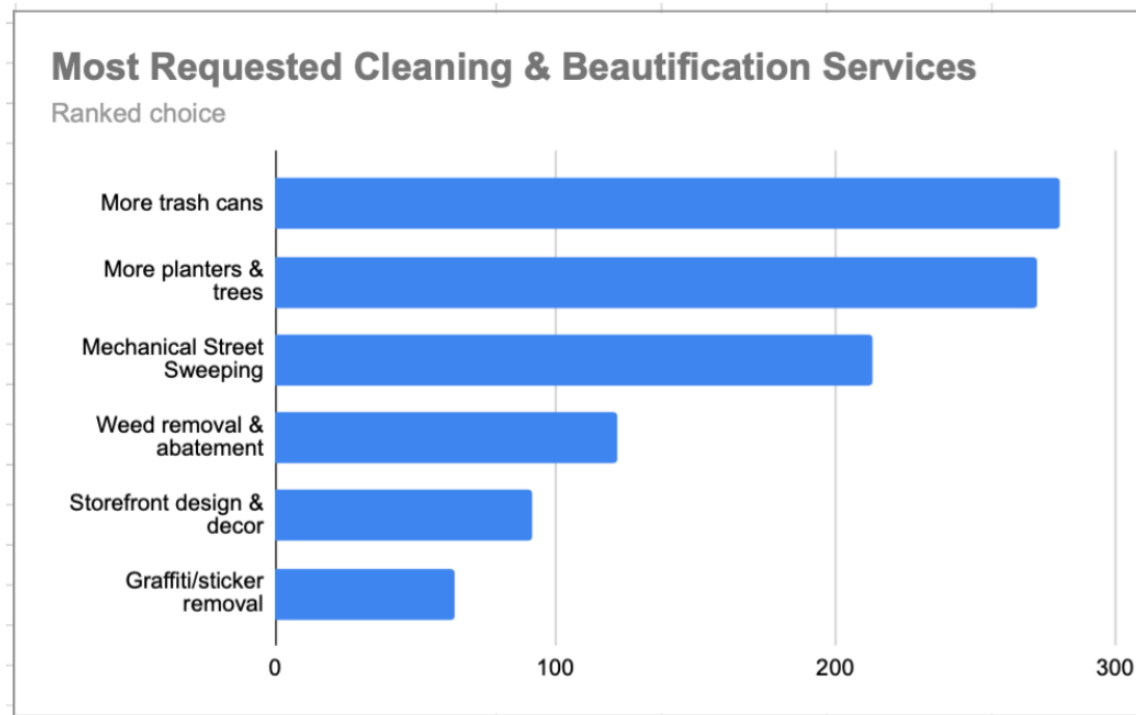
Respondents identified drinking/dining as their top favorite thing about Northern Liberties followed by public space/parks and then proximity to other neighborhoods. Walkability and proximity were echoed in the open-ended question about their favorite thing about living or working in the neighborhood.



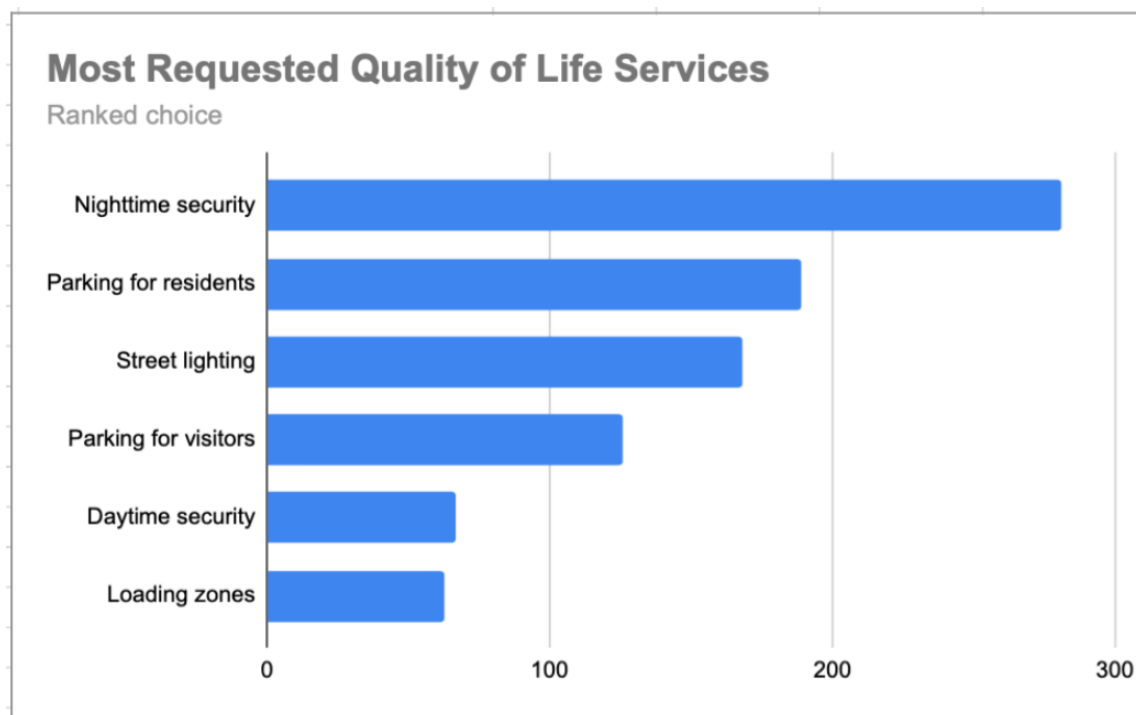
able access activities area atmosphere bars better
businesses cafe center city
community corridors destination dining
distance drink everything feel fishtown food
foot friendly housing lands liberty life living local
location love nd neighborhood
neighbors options park people
proximity public restaurants small
space stores street things town traffic vibe
walkwalkability

WHAT PEOPLE WANT TO SEE

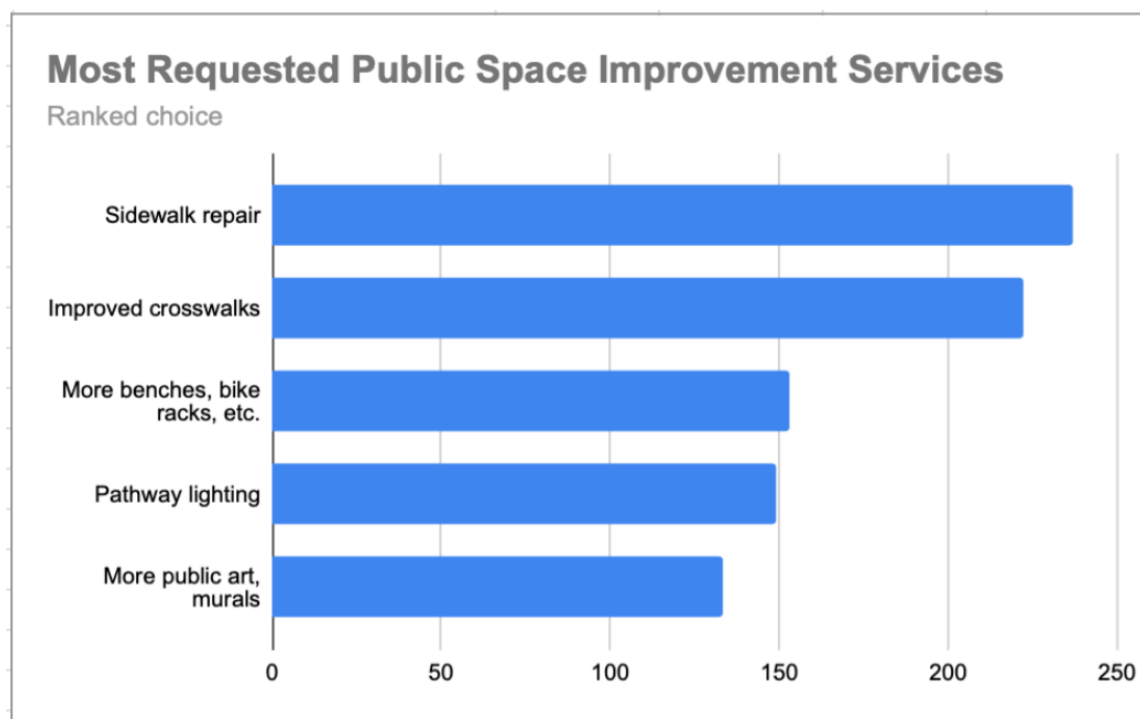
Overwhelmingly people identified more trash cans as their desired beautification priority along with more planters and trees. Mechanical street sweeping has proven difficult to implement but remains a much-desired service. Graffiti and sticker removal ranked lowest with storefront design and décor also taking a back seat.



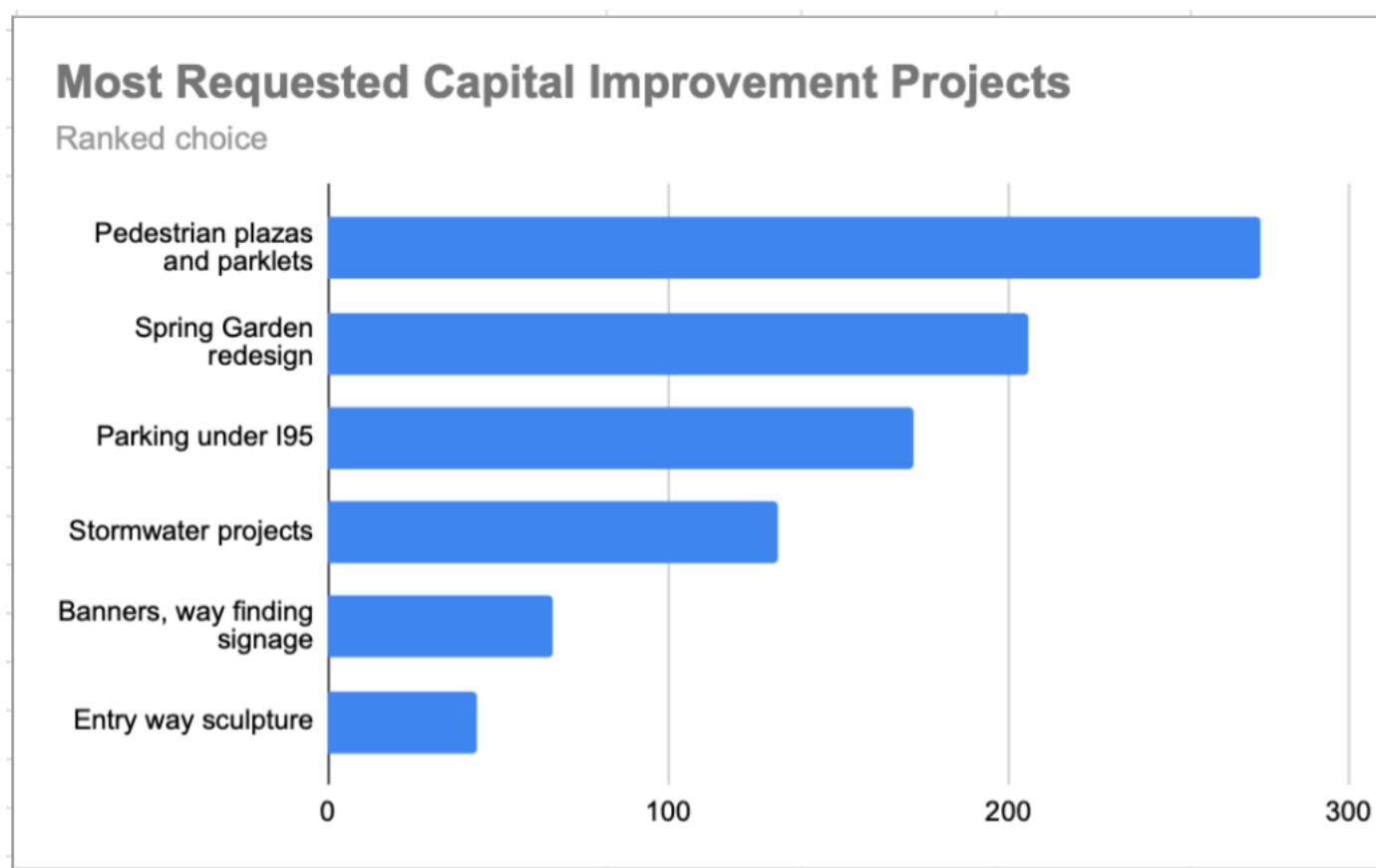
Consistent with rankings of sentiment, improvements to lighting and the strengthening of nighttime security are top requests from the mostly residential respondents, as is parking for residents. They are less concerned with parking for visitors and loading zones, both of which affect the functioning of the business corridor.



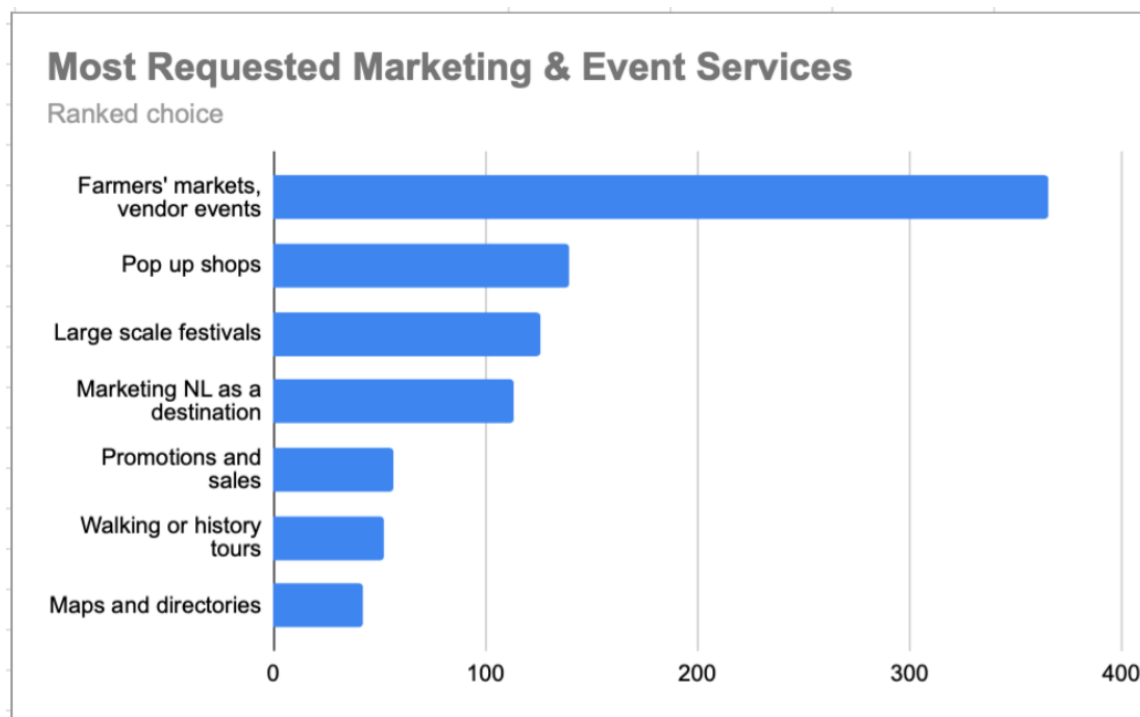
Sidewalk repair and improved crosswalks are the dominant priorities for public space improvements, with more street furniture, improved pathway lighting and more public art being close thirds. In general, capital improvements are popular because they are highly visible and have an immediate impact on the environment.



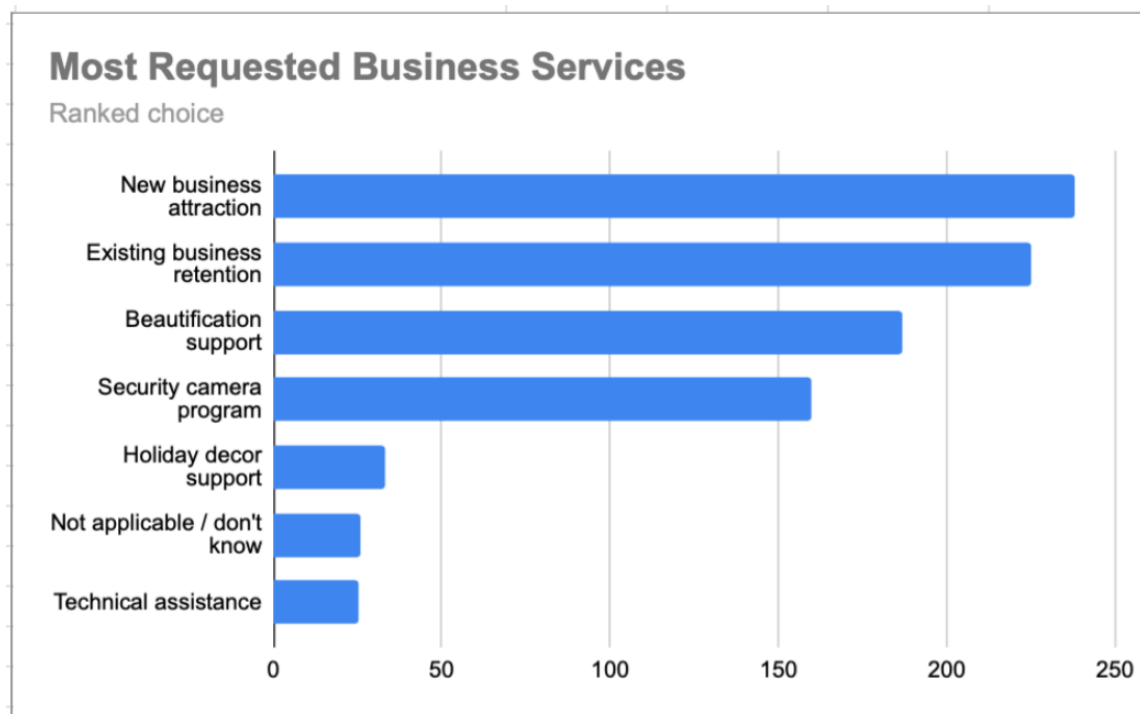
Pedestrian plazas led the pack for large-scale capital improvements priorities. The Spring Garden redesign, for which the BID has already done some design work, also ranks high. Parking under I-95 also ranks as a priority. Again, this survey was dominated by responses from residents who prioritize residential parking.



Without a doubt, people most want to see farmers' and vendor markets. Pop Up shops, which fall into the same vein, are also very popular. Maps and directories are at the bottom of people's wish list, though this could be because most respondents were residents of Northern Liberties.



Respondents want to see new businesses recruited and existing ones retained, perhaps through beautification efforts. That security cameras comes in a close fourth is further support for people's safety concerns.



FUNDING PRIORITIES AND TAKEAWAYS

FUNDING SHOULD BE INCREASED FOR

- Street and ped lighting
- Nighttime safety
- Additional trash receptacles
- Planters and trees
- Sidewalk sweeping
- Staff time for construction site maintenance, capital project execution, producing pop up and farmers markets

FUNDING SHOULD BE MAINTAINED AT CURRENT LEVELS FOR

- Street sweeping
- Staff time for business recruitment, retention
- Sidewalk and beautification grants

FUNDING SHOULD DECREASE FOR

- Business training
- Holiday décor
- Banners and wayfinding signage
- Graffiti and sticker removal

GENERAL TAKEAWAYS

- A street sweeping program is still high priority. City cooperation is the problem, not funding
- Street repaving needs to be prioritized with City government
- Lighting for the sake of safety, not decoration, is the priority
- Marketing/communications should focus on connecting to near neighborhoods as well as our brand as a community, and capital projects should focus on walkability and safe travel between neighborhoods
- The creation of pedestrian plazas, such as the one at 2nd and Laurel, has broad support. Communications should highlight upcoming improvement projects to build support