

Executive Summary

Survey Background

The South Broad Street Conditions Survey was sponsored by the South Broad Street Neighborhood Association (SBSNA) to explore the existing conditions facing business and property owners on South Broad Street. SBSNA is considering options to address ongoing maintenance issues along South Broad Street which may include planning for a Business Improvement District. To best determine an appropriate course of direction for the future of South Broad Street and the efforts of the SBSNA, a survey was conducted to gather feedback from both community business owners and property investors. Thomas Gilbertson of Baseline Community Consultants worked with the South Broad Street Neighborhood Association, to create a short survey that still provided enough detailed stakeholder insights to guide planning efforts for South Broad Street. The South Broad Street Conditions Survey was open from Mid-October 2017 to November 4, 2017. The primary survey instrument was a paper document however, participants also had the opportunity to complete the survey online via Survey Monkey.

There were eighty-four (84) survey responses from an estimated 500 business interests (business tenants and commercial property owners) along South Broad Street, a strong result producing a level of statistical significance or a confidence interval in the range of eight-five percent (85%). Although this result isn't as strong as the desired ninety-five percent (95%) level of confidence, the results and written feedback provided by survey respondents still serve as useful information for SBSNA. This report is designed to serve the SBSNA's efforts when determining how to best approach the establishment of desired services along South Broad Street. This report aims to establish those areas of concern among South Broad Street property and business owners by focusing on items demonstrating the strongest consensus. Another aim of this report is to serve as a pre-planning step for examining the feasibility of exploring a Business Improvement District. To support this more specific focus, this report covers in detail the questions concerned with financial burdens on business and property owners in addition to their top concerns for South Broad Street.

Summary of Key Results

A supplemental component of the South Broad Street Conditions Survey, was an analysis of reassessment trends on South Broad Street resulting from the City of Philadelphia's 2018 reassessment of commercial properties. The reassessment analysis included within this report produced a series of important findings. The top three findings from this report are as follows:

- Nearly sixty percent (57%) of South Broad Street commercial properties experienced an increase in their property assessment while only eight percent (8%) saw a decline. Another thirty-five percent (35%) experienced no change.
- Of those commercial properties experiencing an increase in their assessment, forty-two percent (42%) experienced an increase of more than ten percent (10%) while thirty-three percent (33%) saw a gain of more than twenty percent (20%). Given that many BID assessments range between ten and twenty percent of a property's assessed value, the Reassessment has placed a comparable financial burden on more than a third of South Broad Street properties.
- The average property tax increase on a commercial property was \$1,275 on a average assessment increase of \$91,113. This is approximately double a common monetary BID fee applied on a standard three-story, 2,200 square foot, row-house property (~\$600).

Before asking the four open response questions provided on the second side of the South Broad Street Conditions Survey, respondents were asked to provide feedback along a five-level Likert Scale on a series of nine opinion statements as well as to rank the desirability of a series of four potential improvements. The most significant results from responses provided to the opinion statements and potential improvement ideas is presented as follows:

- The strongest consensus from the multiple-choice portion of the South Broad Street Conditions Survey was the widespread disagreement (73.4% selected either “somewhat disagree” or “strongly disagree”) with the statement that “the sidewalks on South Broad Street are clean of trash and debris.”
- The level of connection business and/or commercial property owners on South Broad Street feel between each other at least on a block-by-block level does not appear to be weak.
- When sifting through the raw data to isolate the results among only those respondents owning a business, it is suspected that approximately two-thirds (66.6%) of business owners selected either “somewhat agree” or “strongly agree” with the statement “South Broad Street is a good place for me to grow and expand my business.” These results are very positive, potentially indicating that South Broad Street has been moving in the right direction for its current business owners, and appears to demonstrate that many existing shop owners would like to remain and grow along the corridor.
- There was a potential indication that consensus may exist around supporting the idea that the current level of greenery along South Broad Street is inadequate. However, approximately one-third (34.2%) of respondents either felt “neutral” or agreed on some level with the statement “There are enough trees and planters along South Broad Street.” A consensus at this level might indicate a tough selling point in terms of pursuing a Business Improvement District.
- Consensus around customer safety was difficult to define, and the results demonstrate a relatively mild lean towards agreement with the statement “My customers feel safe when visiting my business.”
- Consensus leaned towards participants feeling that South Broad Street has a sense of identity with nearly two-thirds of respondents indicating agreement with the statement “South Broad Street has a strong sense of identity.”
- The statement, “The sidewalks along South Broad Street are well lit at night,” produced responses that were balanced along the Likert Scale among respondents, indicating no true consensus. Another observation from the results to this opinion statement is that results to the multiple-choice section of the survey concerning potential improvement ideas should be interpreted cautiously such as to require a higher threshold of desirability before concluding that consensus exist around the subject idea.
- When prompted with the opinion statement, “I am not concerned with my current property taxes (South Broad Street properties only)” just over sixty-seven percent (67.1%) selected either “somewhat disagree” or “strongly disagree.” This result indicates that around two-thirds of the business and/or commercial property owners on South Broad Street feel concerned about their property taxes. The top selection, “strongly disagree” was the choice of just over forty-two percent (42.1%) of respondents – a result matching the number of commercial property owners experiencing an assessment increase above ten percent (10%). Overall, the results provided by survey participants to this opinion statement were consistent with the findings of our 2018 Reassessment analysis for commercial properties on South Broad Street.

- The statement, “Current parking conditions meet the needs of my business,” produced the third highest percentage of respondents selecting “strongly disagree” indicating that a significant portion of business owners along South Broad Street do not feel current parking conditions meet the needs of their establishment. This statement also produced the fourth highest percentage of respondents selecting “somewhat disagree” indicating that another portion of business owners might wish to see parking conditions improved but do not view the current situation as critical. Interestingly, current parking conditions seem satisfactory for nearly a quarter of respondents, potentially indicating that a few “smaller scale” interventions could provide significant improvement in this area.
- Potential Improvement Idea; Regular pan and broom cleaning of sidewalks and gutters – a leading consensus. Out of eighty (80) respondents, this was by far the most desired potential improvement with almost ninety-three percent (92.5%) of all respondents having selected either “somewhat desired” or “highly desired.” Furthermore, more than seventy-six percent (76.3%) of respondents selected “highly desired,” a result matching the percentage of respondents choosing either “somewhat desired” or “highly desired” for the two second most desired potential improvements. This result is impressive and demonstrates the opportunity for a leading consensus.
- Potential Improvement Idea; The addition and maintenance of sidewalk planters. Because of our established precaution for evaluating the results for potential improvement ideas, although this improvement demonstrated desirability, it does not appear to be a leading consensus.
- Potential Improvement Idea; Decorate light poles on South Broad Street with flags. There does not appear to be strong consensus around placing flags on the light poles.
- Potential Improvement Idea; More pedestrian lighting to illuminate sidewalks at night. Nearly a quarter (24.6%) of respondents either selected “neutral” or “not desired.” Because of our established precaution for evaluating the results for potential improvement ideas, although this improvement demonstrated desirability, it does not appear to be a leading consensus.

An important key insight, nearly thirty-six percent (35.9%) of all comments provided in response to the question – “How has Philadelphia’s 2018 reassessment of commercial properties effected your investment?” – indicated that commercial property and/or business owners feel burdened by property taxes and the recent reassessment.

Recommendations from Findings

Based on the information provided for within this report, the following recommendations are provided:

- The SBSNA should work toward continuing to build capacity along South Broad Street. This entails not only getting business and/or commercial property owners to get involved in SBSNA activities but also to become more involved in the activities of the organization and its future goals. Although this survey engaged a great number of stakeholders, a stronger response might reveal a “lurking attitude” along South Broad Street held by individuals who were not inclined to complete the survey. Once again, this survey produced good findings, however, greater participation may have rendered even stronger results while potentially uncovering more insightful comments.
- The SBSNA should take the strongest areas of consensus defined within this report (cleanliness, and potential parking) and reach out to potential partners to determine what small-scale improvements can be made to build momentum towards establishing a nicer and more cohesive business district.

- Given the impacts of Philadelphia’s 2018 reassessment on South Broad Street’s commercial properties, the timing for the immediate pursuit of a Business Improvement District may be off.
- Survey participants provided a great range of comments concerning parking issues. Although parking was determined to be a key issue facing the district there may not be a leading consensus around any one parking solution. However, small-scale efforts to resolve parking problems (such as the proper addition of space lines) should be explored by SBSNA.
- SBSNA should review the current cleaning activities provided by the Passyunk Avenue Revitalization Corporation and other entities to determine how specific cleanliness issues can be resolved – at minimal cost.
- Respondents expressed desires for improved safety and business environment enhancements (greenery, business mixture, etc.) however these issues do not appear to demonstrate a leading consensus.