



LOWERS
Italian Market
revitalization project

for the
Passyunk Square Civic Association

_INTERFACE STUDIO LLC
ECONSULT CORPORATION

August . 08

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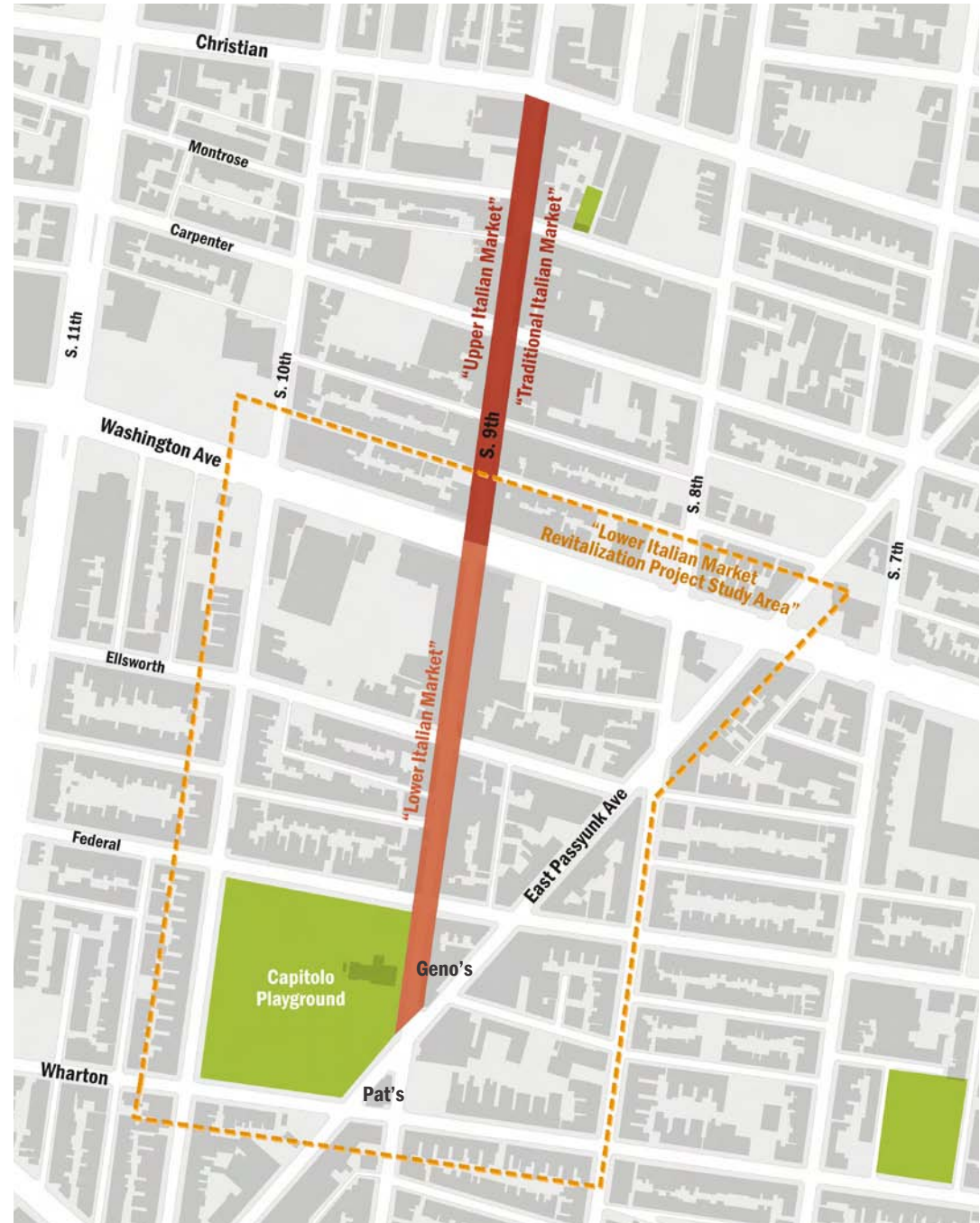
I Executive Summary

The Italian Market is a nationally recognized brand name that artfully integrates the local and the global. Tourists mingle with long-term residents, high-end cheese and other delicacies are sold only doors away from produce that continues to nourish families of all incomes throughout South Philadelphia. The common thread is the familial identity expressed through the Market's seemingly ad-hoc station of stalls and the intense mixture of activity unique to 9th Street. The Market remains relevant because it is gritty, tactile, and uncompromising.

The Lower Italian Market always drummed to a beat of its own. Less oriented toward food than its northern counterpart, through history, the Lower Italian Market was a blend of a wide-range of neighborhood-serving retail mixed with manufacturing and distribution. But once the Italian Market started to make the transition from a local, daily shopping market to a shopping destination, the Lower Italian Market was the first to decline and the hardest hit, as evidenced by its vacancies and underutilized storefronts.

Today, the Lower Italian Market faces a new set of challenges and opportunities. New residents and rising home prices are driving growth around 9th Street. The neighborhoods surrounding the Italian Market have always been diverse, but they are currently becoming more so – both economically, racially, and ethnically. The expanding Vietnamese population and growing Latino presence are visibly re-shaping the look and feel of the Market's storefronts.

Amidst these shifting market dynamics, the Passyunk Square Civic Association (PSCA) recognized a need to create a community-driven strategy to revitalize the Lower Italian Market – a plan that will enable the Lower Italian Market to embrace and strengthen its own evolving character and to develop as a place at once grounded in but distinct from the traditional Market, which lives north of Washington Avenue. The PSCA secured a grant to jump-start the planning process, and this study is the result of six months of dialog, research, thinking, and imagining directed toward creating both short- and long-term strategies for change that respect and reinforce the Lower Italian Market's uniqueness and vibe.



Study Area Map



View down South 9th Street from Washington Avenue.





Plan Goals:

- 1. Get to know the neighbors,** their memories and histories, their priorities for the future. Learn to depend on them to help you reinvent the southern end of the 9th Street Market.
- 2. Take a look in the mirror.** Recognize and strengthen the Market's identity. Adopt a market-based identity for local business. Build upon its reputation as a destination for specialty foods, but broaden its offerings with complementary retail uses that add variety and character, especially in the vein of arts and culture. Nurture an identity that is reflective of the traditional Market, but at the same time fresh and independent, off-beat and distinct.
- 3. Broadcast the Market's identity to put South 9th Street back on the map in new ways.** Begin to attract new visitors independently of the traditional Market and the cheese steak joints, Pat's and Geno's.
- 4. Reinforce the Market's local flavor and authenticity.** Encourage and support small, local, and/or family-owned businesses along the corridor.
- 5. Reinforce the Market's long-term viability.** Strengthen the corridor's links to surrounding neighborhoods, the City, and the region.
- 6. Facilitate peoples' arrival in the Lower Italian Market.** Lessen the perceived physical boundary created by Washington Avenue. Promote travel to and from the corridor by multiple modes, particularly by bicycle and on-foot.
- 7. Don't wait for a catalyst project to jump-start this change.** Initiate temporary uses to activate the corridor *now*.
- 8. Embrace the corridor's urban marketplace.** Promote mixed use development that brings new density and activity to South 9th Street, new shops and new venues, new residents and new customers. Mix some green and some green development into the corridor's mixed use equation.
- 9. Balance lived-in with livable.** Savor the grit and the rhythms that are inherent in the Market's operation, but improve South 9th Street's cleanliness and appearance enough to encourage people to linger a little longer and return a little sooner.

The following recommendations form a comprehensive strategy for the corridor and promise to put the Lower Italian Market back in business and back on the map as an eclectic and evolving hub of living history and a vibrant collection of shops and eateries, serving the neighborhood, the City, and the region.

1 Building Community

The Italian Market has always been a melting-pot, a sponge absorbing growing immigrant communities, and a nesting place where newcomers live, work, and shop together – a home away from home. As the Italian Market has endured over a century of change and flux, a central tenet of the Lower Italian Market's future must be to integrate and embrace diversity in ways that reinforce the larger identity of the Market. For this to occur, all populations must have a voice at the table and play an active role in the coming future. The recommendations for Building Community detail ideas for increasing communication, trust, and pride within the Lower Italian Market community.

2 Developing Identity (and flaunting it)

The Lower Italian Market is wedged between the long-standing, well established, and marketable Italian Market and an iconic intersection of cheese steaks. But the Lower Italian Market is also in close proximity to the emerging Passyunk Avenue hipster scene, while strangely situated among a mixture of auto garages, auto-oriented specialty markets, dense residential blocks, and a growing number of Latino businesses. The question of identity must somehow navigate this mixture of powerful images.

Ultimately, the corridor's reinvigorated commercial mix will, in large part, form the basis for the Lower Italian Market's revitalized identity, branding, and marketing. Recommendations to enhance the area's identity include an emphasis on food, the arts and the corridor's role as a bridge between local and global influences. These themes must also be expressed, and this plan recommends putting the Lower Italian Market on the map through joint marketing opportunities with Passyunk Avenue, promoting new events and placing signage in visible locations.

3 Guiding Change, Igniting Change

The Ice and Coal site as well as a handful of other spaces along 9th Street are either vacant or underutilized and awaiting a strengthened market to push new businesses through their doors. An activated streetwall offering visual interest and contiguous shopping opportunities is important along an urban retail corridor like South 9th Street,

but redevelopment of the Ice and Coal site could take years, and the commercial market for the smaller retail spaces will take time to build too. Recommendations oriented toward igniting change are directed toward developing clear expectations for development that the PSCA Zoning Committee can use in future negotiations as well as developing ideas for short-term and temporary uses of vacant sites until they are redeveloped.

4 Getting There, Getting Around (and enjoying it)

In true South Philly-style, the automobile typically dominates the street, the curb, and the crosswalk or median, despite the fact that it is the area's pedestrian-scaled environment that makes this corridor appealing to small shop and open-air market patrons. The Lower Italian Market should more safely accommodate and offer additional amenities for pedestrians and cyclists, incorporating designs that enliven and reward the travel experience for those moving at slower speeds. Recommendations to enhance the pedestrian (and bicycle) environment include shrinking the expanse of the Washington Avenue and 9th Street intersection, redesigning the awnings, encouraging new stalls or alternative sidewalk uses, and making room for bike parking.

5 Growing Green

Despite the PSCA's recent tree plantings and community efforts to improve the neighborhood's urban forest, much of the study area remains sparsely planted. The lack of permeable land prevents effective stormwater management, and many have expressed the desire for the Market to grow greener. Design solutions should incorporate a greening strategy that accounts for the narrowness of blocks and the limited amount of sun exposure by introducing natural elements in areas that preserve and enhance the integrity of adjacent properties. But for the Market to truly grow green, a major emphasis must be placed on reinvigorating Capitolo Playground as an attractive green oasis. This plan advocates for new recreation facilities, new park entries, expanded programming, and a softer edge that moves the chain link fence back to allow for new landscaping.

6 Sparkling Clean (and kept that way)

Despite recent improvements to curb-side garbage pickup and improved City management, trash continues to saturate conversations with local residents and business owners. From insufficient garbage pickup, to litter along the curbs, antiquated and unhealthy means of waste disposal, and some lack of diligence by corridor businesses, trash plagues 9th Street. Recommendations intended to clean up the Market are oriented toward a combination of better enforcement, more grass-roots involvement, new trash bins, education and outreach, and coordinated street sweeping.

crosswalk island



mixed use development



redesigned awnings with skylights



zebra-striped crosswalks



signage



food



Proposed improvements for the intersection of 9th and Washington and the gateway to the Lower Italian Market.



elevated park over the carriage houses



bicycle parking



planted median



striped bike lanes





II Introduction & Methodology

Purpose of Plan



The Lower Italian Market sits at one of the most prominent cultural intersections in the City of Philadelphia, celebrated as a cornerstone of the City's historic roots that continues to mesh immigrant communities and maintain a sense of authenticity in South Philadelphia. Benefiting from the rising market in Queen Village to the east and Center City to the north, the Italian Market has enjoyed a recent surge of tourist activity and city-wide restaurant produce demand.

The Lower Italian Market, located south of Washington Avenue, has experienced a largely different scenario than that of its northern counterpart. Though the recent acquisition and demolition of the long-vacant Ice and Coal building at 9th and Washington Avenue removed a major source of distress and frustration from the physical landscape, concern regarding the future development of the site remains a central theme in the community's dialogue. Similarly, many of the small carriage houses that line the west side of 9th Street offer little square footage and few business amenities compared to that of the 9th Street properties north of Washington Avenue, thus exacerbating a shared sense that the existing is somewhat temporary.



Local textures and character.

Over the past few years, the demographics of the Lower Italian Market have changed in ways perhaps unforeseeable by local long-timers. South 9th Street, today, is home to a healthy and somewhat established mix of Asian, Latino, Lebanese, and Italian Americans. Recently, and increasingly, the Lower Italian Market area stretching southwest along Passyunk Avenue has been drawing an influx of hipsters and late-twenty-somethings seeking affordable housing and a down-to-Earth vibe. Neighborhood appeal is on the rise, but much remains to be done.

In the context of such changes and opportunities, the Passyunk Square Civic Association (PSCA) recognized a need to create a community-driven strategy to revitalize the Lower Italian Market – a plan that will enable the Lower Italian Market to embrace and strengthen its own evolving character and to develop as a place at once grounded in but distinct from the traditional Market, which lives north of Washington Avenue. The PSCA secured a grant to jump-start the planning process, and this study is the result of six months of dialog, research, thinking, and imagining directed toward creating both short- and long-term strategies for change that respect and reinforce the Lower Italian Market's uniqueness and vibe.

Project Partners

The **Passyunk Square Civic Association (PSCA)** is a Pennsylvania nonprofit corporation founded in the winter of 2003 by neighbors Geoff DiMasi and Sue Montella, who realized the power and importance of having an active civic association to give residents and business owners a voice in what happens in their own community. The mission of PSCA is to enhance the quality of life in the neighborhood, preserve the neighborhood's unique historic character, and to promote a cohesive community of residents, businesses, and institutions.

PSCA has three main goals:

- 1. Quality of Life** – to improve open spaces, create an attractive environment, promote local businesses and institutions, and improve the climate for living, visiting, and doing business in this area.
- 2. Historic Character** – to preserve our architecture, promote our rich history, and ensure appropriate development.
- 3. Community Building** – to reinforce a sense of neighborhood, keep members informed, involve the community in activities, facilitate consensus-building, promote the neighborhood image, and encourage public service.

PSCA hosts monthly General Meetings:

The first Tuesday of the month (except July and August) at 6:30 PM
Meetings are held at the South Philadelphia Older Adult Center, East Passyunk Avenue at Dickinson Street.

INTERFACE STUDIO LLC, an urban design and planning firm based in Philadelphia, is the lead consultant for the Lower Italian Market Revitalization Project. All of the Studio's work stems from a shared commitment to promoting the long-term viability of urban neighborhoods and commercial corridors by celebrating their unique and defining characteristics with fresh and inventive design solutions. The firm adopts a comprehensive approach focused on identifying critical physical, social, and economic opportunities that will foster sustained and meaningful change. Interface Studio has extensive experience in planning for neighborhoods undergoing rapid change and redevelopment and in that capacity has successfully developed plans that are both innovative and achievable.

ECONSULT CORPORATION is an economic consulting firm whose practice includes economics and policy advisory services. Econsult services include management and organizational advisory services; market studies; project investment evaluation; benefit cost analysis and feasibility studies; and economic impact and hedonic price studies. The firm specializes in assisting clients with structuring successful development initiatives and planning objectives that are justified economically, sustainable financially, and fully implementable. Econsult provided the commercial market analysis and market potential recommendations for this study.



PSCA General Meetings held at the South Philadelphia Older Adult Center (East Passyunk Avenue at Dickinson Street) are open to all.

Study Boundaries

PSCA's boundaries encompass a broader area than that of the study area adopted for this planning project: the Passyunk Square neighborhood reaches from Washington Avenue in the north to Tasker Street in the south, Broad Street at the western edge to 6th Street in the east.

However, as this plan focuses on the Lower Italian Market, or the portion of the South 9th Street commercial corridor between Washington Avenue and Federal Street, the study area for this project is much more targeted, bounded by:

- **8th Street** to the east, so as to capture a portion of Passyunk Avenue;
- **10th Street** to the west, so as to include Capitolo Playground;
- **League Street** to the north, just above Washington Avenue; and
- **Wharton Street** to the south, so as to capture the dynamics of Pat's and Geno's, Philadelphia's cheese steak dueling grounds.

Planning Playing Field

This plan builds upon a foundation of planning work generated prior to this study, namely the:

- **9th & Ellsworth Redevelopment Area Plan** created by the Philadelphia City Planning Commission in 2006; and
- **SoPhi: A Downtown Plan for Washington Avenue** created by University of Pennsylvania City Planning Masters students also in 2006;

Base Map



Planning Process

Though organizing discussions and data collection for the plan commenced in late summer 2007, the six-month planning process for the Lower Italian Market Revitalization Project began, in earnest, in January 2008 and will end in June 2008 with the adoption of a final plan by the PSCA. Ultimately though, the plan belongs to the larger Passyunk Square community, those who live, work, shop, eat, create, invest, and play in the Lower Italian Market and surrounding areas, those whom the PSCA represents. Creating a plan reflective of their collective concerns and desires required that public dialog be a central part of the planning process. As implementation moves forward, this dialog must remain ongoing, growing both to include newcomers to the organization and newcomers to the neighborhood.

Public Outreach

Over the past six months, the Interface Studio team conversed frankly with a sample of community leaders and neighbors, business owners, political representatives, investors, activists and artists in a series of confidential interviews and open public meetings.

The team conducted interviews with a mixture of local long-timers, new residents and new businesses, and members of the Italian, Asian, and Latino communities. The interviews offered a foundation for the team's understanding of the Lower Italian Market – **the dirt and the gossip, the low-down, the history, and the pulse of the place.**

- The team conducted two community meetings as well at turning points in the planning process, inviting the entire community to serve as a sounding board, offering comment, critique, and feedback, and thus ensuring that the plan captures their concerns and hopes, values and priorities. The PSCA General Meetings served as the forum for discussions about the findings of the analysis and about the proposed recommendations.
- Throughout the planning process, the team met regularly with the PSCA Planning Committee, charged with overseeing the process, guiding the plan's evolution, and providing invaluable guidance, input, and humor along the way.

**You talk, we listen.
You whisper, we'll keep your secrets.
We talk, you tell us what you think.**



Project Phases

The Lower Italian Market Revitalization Project, led by the Interface Studio team and overseen by the PSCA's Planning Committee, consisted of three phases:

I The **Research and Existing Conditions Phase**, defined by observation, research, and outreach to assess neighborhood dynamics, measure market competition and potential, and determine study area needs included:

- A survey of each parcel within the study area to create an up-to-date land use map, document building conditions, locate recent investment, and provide a current state of affairs;
- An in-depth examination of the physical environment and commercial market conditions within the study area to assess the existing commercial and retail mix, market synergies or lack thereof, the quality of the natural environment, visual interest and pedestrian impediments, local traffic and circulation patterns, parking resources, and future opportunity locations;
- Census research to evaluate demographic and socioeconomic changes within the study area over time;
- A review of old maps, photographs, and historic accounts as well as of pre-existing plans that will in some way touch or impact the future of the Lower Italian Market; and, perhaps most informative,
- A public outreach initiative designed to get the gossip on the ground and access the qualitative aspects of the neighborhood.





The Carriage Houses on the west side of South 9th Street.

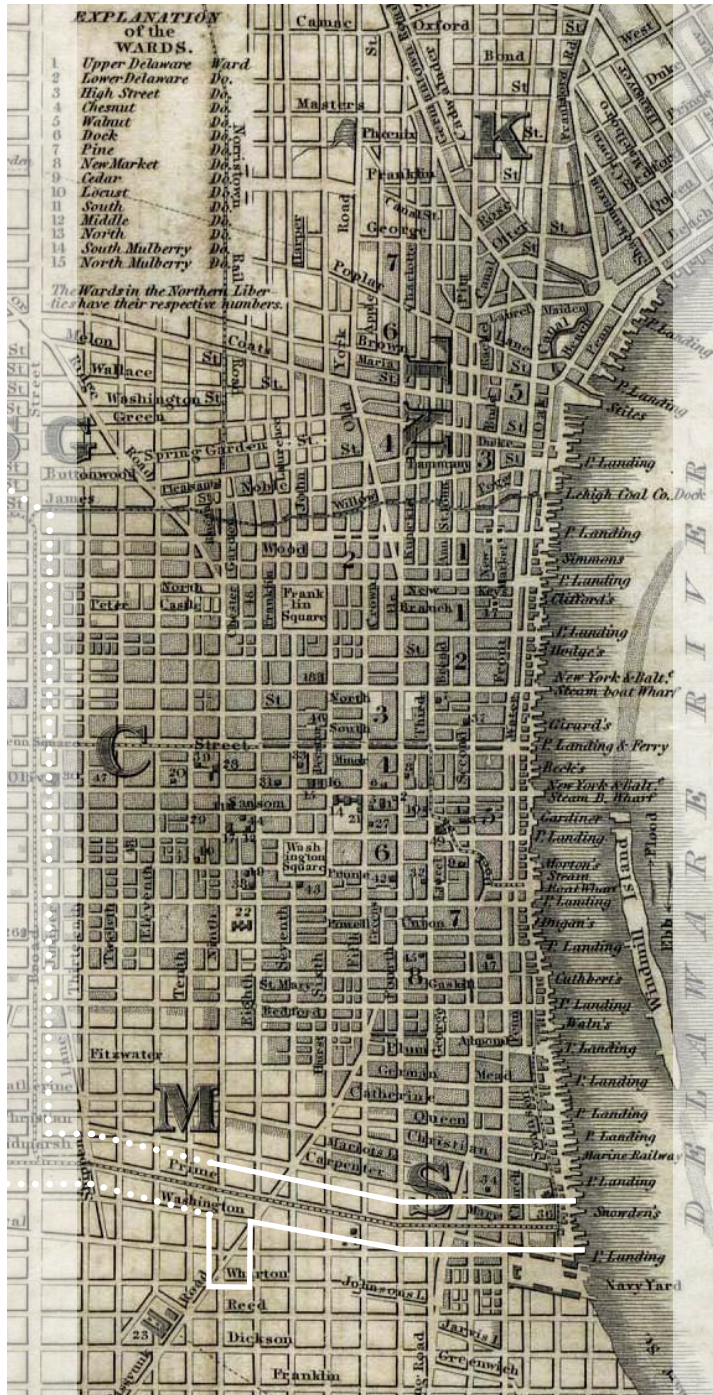
2 The **Recommendations Phase** involved:

- Compiling and illustrating a series of preliminary recommendations and commercial market strategy in response to the key issues identified at the close of the Research and Existing Conditions Phase;
- Sharing the preliminary recommendations and market strategy with the PSCA Planning Committee to ensure that the ideas were on target;
- Presenting the preliminary recommendations and market strategy to the community for feedback, critique, and approval;
and
- Tweaking the recommendations to reflect the public input.

3 The planning process culminates with the drafting and delivery of this document, the **Final Plan**. Together with the PSCA Planning Committee, the Interface Studio team will then develop an Action Plan and Implementation Matrix that defines PSCA priorities and indicates a timeframe and potential partners for each recommendation. Upon completion of the plan, the team will be available to present the final plan to the Lower Italian Market community, to City officials, and to other entities whose support is necessary for successful implementation.

PSCA, as a nonprofit neighborhood group and an empowered effector of change next assumes responsibility for the Lower Italian Market Revitalization Project, its adoption, and its implementation, so...





Historic Map of Philadelphia, 1842. Source: www.lib.utexas.edu



III The Italian Market: yesterday to today

The Beginnings of a Market

In the 1800s, the Delaware River waterfront served as Philadelphia's front door, greeting goods from abroad and elsewhere and transferring these products to the rail lines that blanketed the City for further distribution. The primary port during this time for coal, other materials, and sometimes people was located at Prime Street – today's Washington Avenue. The Prime Street port linked to the Southwark Railroad, which ran westward toward Broad Street and then north through the City.



Ice and Coal Building, pre-demolition, 2008.

The recently demolished Ice and Coal Building at 9th and Prime served as a major stop along this rail line. Still early in the City's development, the location was already a crossroads due to an existing Indian trail which became Passyunk Avenue and the subsequent construction of the Moyamensing Prison which is now the Acme grocery at Reed and 11th Streets. Goods were unloaded at the Ice and Coal building and then reloaded in horse-drawn carriages, which were stored across the street (now the



L - R: Northwest corner of 9th and Washington, 1914; Ice and Coal Building, 1915; Carriage houses at the northeast corner of 10th and Washington, 1914; Southwest corner of 9th and Washington, 1915; 9th Street Curb Market, 1937; Northeast corner looking west from 9th and Washington, 1938. Source: www.phillyhistory.org

The Lower Italian Market Stands Apart

one-story carriage houses on 9th Street). Space behind the carriage houses (currently a parking lot) was used for the storage of excess material and sand, and a successful steel fabricator was established on 10th Street. The Lower Italian Market's first identity was as a distribution center.

With distribution came jobs, and Antonio Palumbo in the 1880s started a boarding house on 9th Street for the multitude of immigrants that sought work in the area. Welcoming a wide range of immigrants, many from Italy, each family imprinted its culture physically on 9th Street. The need for food and day-to-day goods fueled the ad-hoc development of an active, outdoor market where the immigrants themselves were both merchants and customers. It was pragmatically called the **"Ninth Street Curb Market"** or **"9th Street"** for short. The Market reached critical mass in the early 1900s when many of the anchor businesses that exist today – Fante's, Di Bruno Brothers, Esposito's, Giordano's, and Claudio's, for example – were established. Today it is the **"oldest, continually active outdoor market in the Country."**

9th Street grew outward from Palumbo's boarding house, which was located north of Christian Street, and this is where the greatest concentration of retail activity was centered. But with a continued influx of families, all of 9th Street stretching south from Christian to Federal Streets filled with retail activity.

Lower 9th Street (south of Washington Avenue) always exhibited a different vibe and mix of stores. While lower 9th Street was Italian, it was also heavily influenced by a strong Lebanese community and Jewish families, many of which according to interviews, owned local stores. While 9th Street above Washington was distinguished by its food and produce, lower 9th Street offered a mixture of other necessary goods from hardware to clothes and shoes. The two blocks south of Washington Avenue never developed the anchor stores like Di Bruno Brothers that characterize the upper portions of 9th Street.

Instead, lower 9th Street's character was largely influenced by the continued presence of large uses that dominated both its northern and southern ends. To the north, at the intersection with Washington Avenue, the Ice and Coal building remained a gap in



Home of the Philly Cheese Steak.

the contiguous stretch of retail storefronts which grew around it. To the south at Federal Street was Lafayette Cemetery, founded in 1839. The Cemetery ceased operations in 1946 (along with a few others across the City) to make way for a large City-sponsored playground building project resulting in Capitolo Park.

The mid-1900s brought the invention of the cheese steak and the establishment of Pat's King of Steaks at the crossing of Passyunk and 9th Street. Their success quickly fueled additional restaurants including Joe's Steaks across the street (currently a vacant building) and, later, Geno's in 1966. The Passyunk and 9th Street intersection remains an iconic Philadelphia destination due to these uses. One store owner interviewed for this project indicated he moved to this Country and started his store at the Italian Market because of Pat's, Geno's, and Rocky.

Those who grew up around the lower 9th Street Market recall an active and vibrant street where **"grapes were sold every fall"** so wine could be made locally, but these same people also note that the two blocks between Washington Avenue and Pat's and Geno's were always **"the stepchild of the market."**

The Market Falls Victim to... a Changing Market

It is unclear to many local owners when the 9th Street Curb Market became the "Italian Market," but the change in name signifies the challenges the market has faced in attracting customers and sustaining itself.

After 1950, Philadelphia quickly became what is commonly referred to as a "shrinking city." Years of population decline, combined with the concurrent expansion of the suburbs and growing reliance on the automobile, brought expanded mobility and introduced new forms of shopping to much of the population. The traditional relationship between living and shopping was severed, and the "main streets" in the City, which once met the daily needs of local customers traveling by foot, were forced to find a new identity to compete in a regional economy.

For traditional commercial corridors like 9th Street, this meant a substantial decline in the local buying power that once supported the continuous string of active storefronts that lined the corridor deep into the heart of South Philadelphia. The historic trend of shop owners occupying the living quarters above their stores ceased, and local residents started to spend their dollars at shopping centers scattered across the City and region. The effects of changing spending patterns and increased consumer mobility became manifest on 9th Street in the growing number of vacant stores and abandoned upper floors as well as in the decreasing number of street vendors. **"These days, two blocks is too far for market shoppers to walk."**

The food-oriented stores fell victim to other trends as well. Many existing uses were **"grandfathered"** in with regard to zoning codes and other licenses. When these stores changed hands, some new owners could not afford to meet the new codes and regulations, and these long-time shops subsequently went vacant. The spread of supermarkets in the 1950s also changed the national expectations in terms of food storage and safety. To ensure equal competition, supermarkets lobbied to require that existing businesses on 9th Street had to integrate new (and expensive) refrigeration systems in their stores. While some were able to comply, others went out of business.

Despite these significant challenges, the 9th Street Market remained and adapted. Now officially branded the Italian Market, the area serves a growing tourist market. The successful Italian Market Festival has reinforced this success. Originally built upon an Italian tradition of climbing a greased pole, the celebration was also oriented toward honoring the Virgin Mary – the Patron Saint of the Market. When the Festival first started, a priest would bless all of the local stores cementing 9th Street's image as a mix of religion, culture, and food.

A Continued Nexus for Immigration

Today, the Italian Market is still supported in large part by visitors and tourists, be they from outside Philadelphia or from another Philadelphia neighborhood. Although some local residents continue to shop at the Market, many others now shop along Delaware and Oregon Avenues instead. It is difficult to fuel a lengthy commercial corridor on tourists alone, and for decades, vacancies have continued to sprout up, and while the image of religion, culture, and food told one compelling story of the Italian Market, the area's other key identifying feature – immigration – was finding a renewed presence on 9th Street.

During the late 1980s and early 1990s, the Italian Market hit what many refer to as **“its low point.” “9th Street almost died 15 years ago.”** It was during this time that immigration made a significant impact on the Market today. In the 1980s, a number of Vietnamese families moved into homes and started businesses nearby along 8th Street. Many people from these families also found jobs on the Italian Market adding a new and visible diversity to 9th Street. In the early 1990s, many Chinese families followed suit, and some bought buildings along 9th Street which they still own today.

At the same time, Mexican immigrants were drawn to the area in part by St. Thomas Aquinas church in the adjacent Point Breeze neighborhood. St. Thomas Aquinas offered a number of programs and services in Spanish, and many Mexican families made the area home. According to a 2007 article in the Philadelphia Weekly entitled “Sign Language,” there are an estimated 12,000 Mexican residents living neighboring Bella Vista today. The article further notes “a strong Mexican influence down on the [south] end of the market,” where some of these residents have invested heavily in 9th Street, transforming what was vacant less than six months ago into a mix of restaurants and other businesses oriented toward Latino families south of Washington Avenue. One interviewee referred to the lower Italian Market as **“Little Mexico.”**



New languages diversify signage in the Lower “Italian” Market.

Facing the Challenges Today

The Italian Market today has found yet another voice as the center of an expanding residential community. As determined by Econsult, the housing prices around the Italian Market grew far more quickly since 1995 than in any other area in South Philadelphia. This raised a number of concerns, most notably on the issue of affordability, among new immigrants and old-time residents alike.

In addition to the strong housing market, 9th Street has also been discovered by Philly’s “hipster” scene, drawing well-educated, young, generally liberal and non-mainstream, middle- and upper-class adults to the corridor and surrounding areas. Many credit Sabrina’s café with first putting 9th Street on the hipster map, but combined with new coffee houses on 9th street, arts venues, and new pubs on Passyunk Avenue further south, the hipsters are transforming the look and feel of both the Italian Market and the Passyunk Avenue retail district. The influx of new residents has helped to reinvigorate the Passyunk Avenue retail district, but has also created tensions between new and old residents with often conflicting values and aspirations for the area’s future

Where new and old residents agree is that the Lower Italian Market is not what it could or should be. It serves neither local residents nor tourists very well and remains a gap in what is an extremely active and vibrant center of South Philadelphia. A culprit, according to many, was the Ice and Coal building. Vacant for decades, the Ice and Coal building effectively signaled the end of the Italian Market at Washington Avenue. It was for years discussed as an opportunity for new senior housing, but the owner was unwilling to sell.

Long frustrated by the inability to redevelop that site, the Philadelphia City Planning Commission created the *9th & Ellsworth Redevelopment Area Plan*, which encompassed the Ice and Coal building, enabling the City to acquire the land at any time for fair market value. Due to the inclusion of additional properties near the Ice and Coal building in the redevelopment zone, many in the community were outraged by, what they describe as, a lack of public process and the threat of acquisition.

Although the process of creating the *9th & Ellsworth Redevelopment Area Plan* was controversial, the Ice and Coal building was recently sold privately and subsequently demolished. As of the writing of this report, no plans have been unveiled, but residents remain hopeful that in the near future the site will provide the missing link to the Lower Italian Market, long needed to encourage retail activity south of Washington Avenue. Combined with the renewed emphasis on planning and implementation in the City of Philadelphia and the Nutter administration’s optimism, these trends suggest a coming wave of change in the Lower Italian Market.



As the area's rich and unfolding history meets the challenges and new opportunities facing South 9th Street today, the Lower Italian Market is poised to welcome a new future. In the context of these urban dynamics, the Passyunk Square Civic Association applied for and received a grant to create a community-driven plan that will help guide coming change in the Lower Italian Market. The challenge is to fill these three blocks nestled between national icons – the Italian Market and Pat's and Geno's – with a mix of activity, culture, and retail that exemplifies the best and most unique qualities of the Market, yesterday and today.



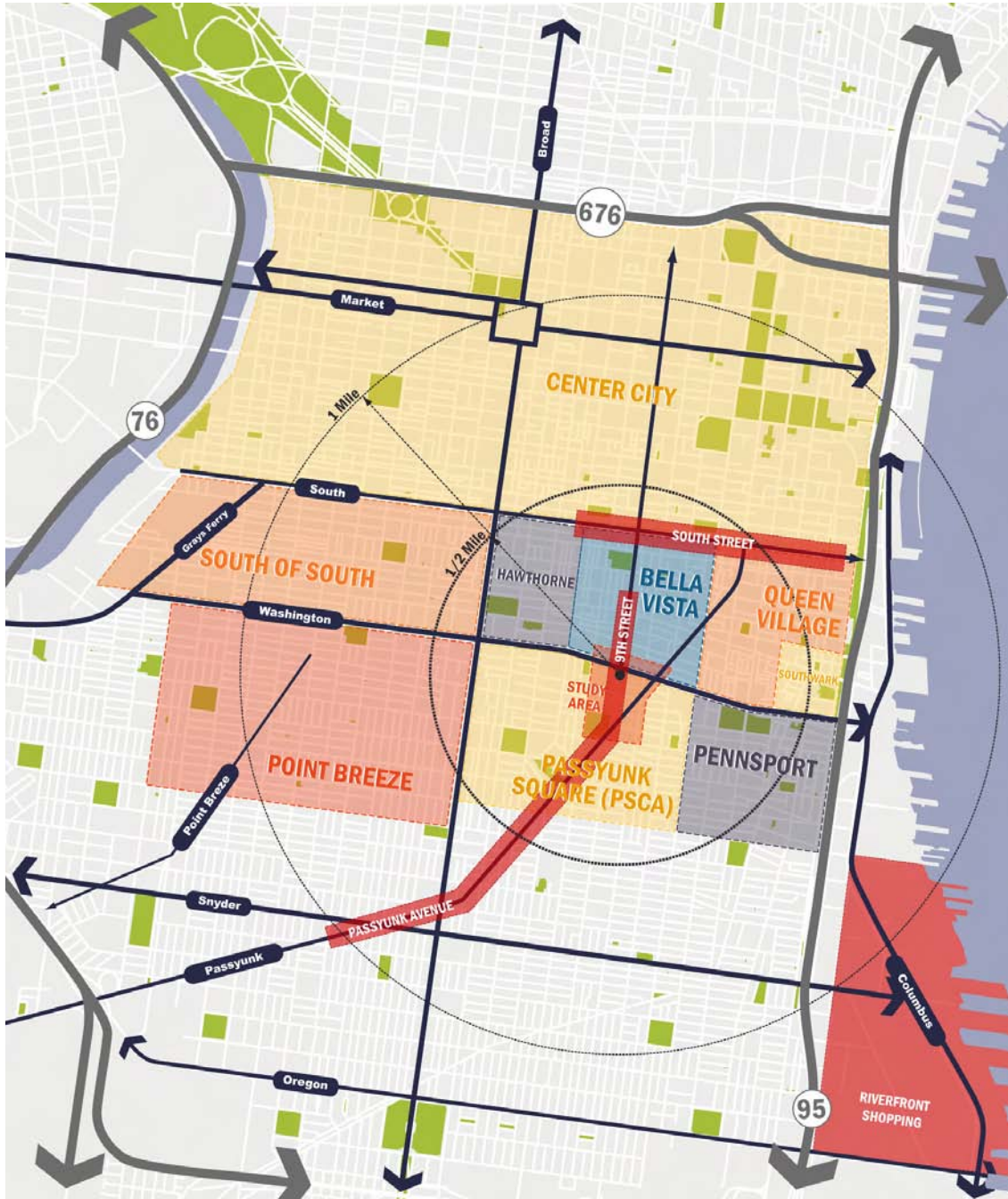
Entering the Lower Italian Market from Washington Avenue.

IV Existing Conditions

The following research and data represents a snapshot of the Italian Market and surrounding neighborhoods in time. Direct observation, data collection, and one-on-one interviews form the basis for the information.

Context

The Lower Italian Market is located in South Philadelphia, one half mile from South Street and a little over one mile from City Hall. It occupies a strategic location less than a mile from the Delaware River and less than a half mile from the Broad Street subway; its front door opens on Washington Avenue, one of the major east-west corridors in the City. It is also closely connected to the Passyunk Avenue retail district located just to the south, which, along with South Street, is the one of the two longest commercial corridors in South Philly. Most importantly, the Lower Italian Market is nestled within dense and appreciating neighborhoods that have a long history and very proud residents.



The study area, while focused on 9th Street, actually includes three major City streets—9th, Passyunk Avenue, and Washington Avenue. Each of these streets changes in character and general use from one side of the study area to the other. 9th Street is strongly commercial north of Washington Avenue but residential south of Wharton Street. Passyunk Avenue is strongly commercial south of Wharton Street but almost entirely residential north of Washington Avenue. Washington Avenue is broadly recognized as the City’s design and materials corridor west of Broad Street and is distinctly Asian in retail flavor within the few blocks immediately east and west of 9th Street. Although each street is unique, within the study area they all share a vague identity. Vacant stores, active industries, retail, housing, garages and auto-body shops are all mixed together. The end result is that the study area feels transitional, less like a destination and more like a gap in local activity.



Left: **Neighborhood Context**

Above: **Corridor Context**



Demographics – Who Lives Here?

The following presents data collected from the United States Census for the year 2000. The geographies used in this analysis compose those Census block groups that touch and have a majority of their area within the study area boundary. A full listing of included Census block groups is included in the Appendix.

Population and Population Change

In 2000 (the last year the Census was taken), the population within the Census block groups that encompass the study area was almost 2,300 people. This equates to an increase of a couple of hundred people, or roughly 10 percent, from 1990. The rest of Philadelphia lost 4.3 percent of its population during the same time frame.

Race and Ethnicity

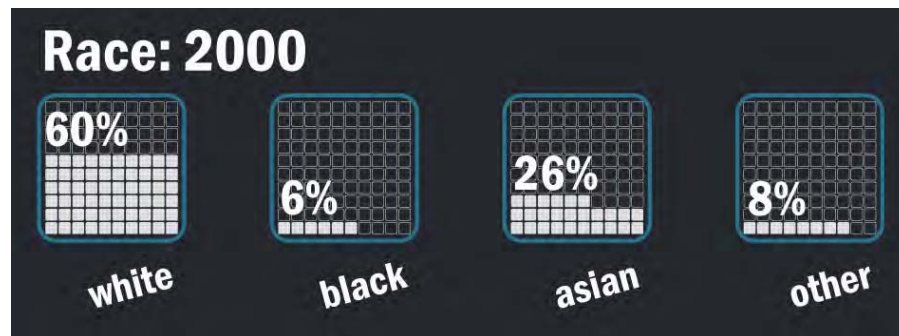
“It’s like the United Nations, here in Philadelphia.”

The 2000 Census indicates that the study area is more white, less black, and significantly more Asian than the City as a whole. At that time, the Census reported that five percent of the area was Latino. Much has changed since 2000, however. While Asian residents maintain a significant presence, the number of Mexican residents, from Puebla, Mexico, specifically, as well as other Latino families has swelled. It is estimated that 12,000 Mexican residents live within neighboring Bella Vista alone. The 2010 Census will probably only capture a percentage of these residents, as some are likely undocumented and will not want to be counted.

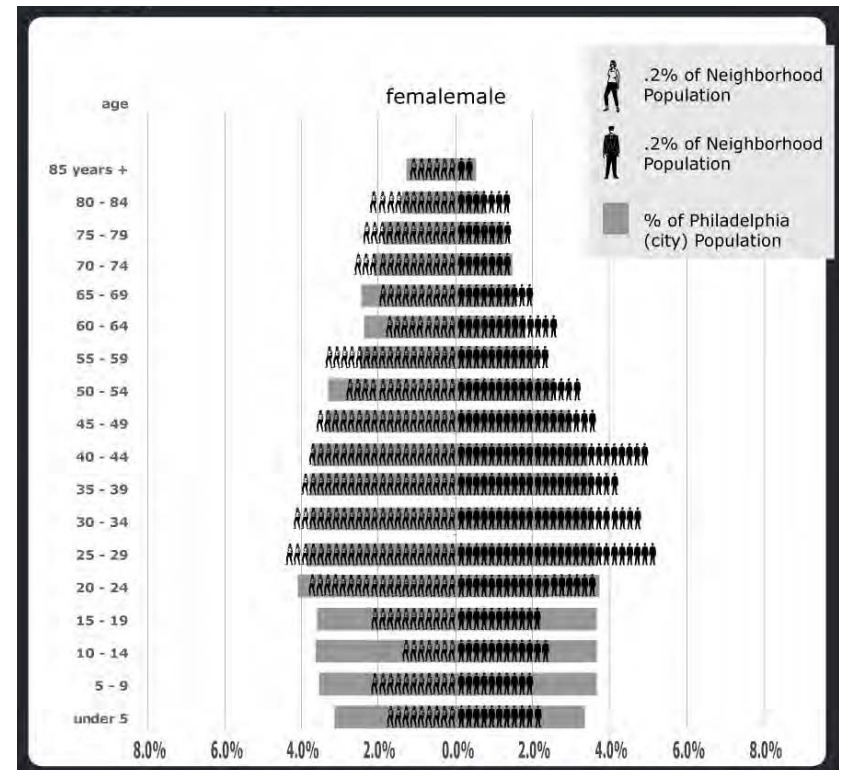
In evaluating Census data approximately a half-mile beyond the study area, far more racial diversity is evident. The Hawthorne and Point Breeze neighborhoods are predominantly black with a growing presence of Hispanic and Asian families including Cambodian, Filipino, and Laotian residents, while Queen Village and Pennsport are characterized by a larger percentage of white residents. The study area for the Lower Italian Market Revitalization Project is the meeting place for people of all of these different backgrounds.

Age Structure

The number of elderly (particularly women) in the study area far surpasses the average rate for the City as a whole. At the same time, men ages 25 and 55 also outpace City averages. While only a small percentage of residents were under the age of 19 in 2000, today a local baby boom is visibly present in the community. To plan for the Lower Italian Market’s future, the needs of both the elderly and a growing number of families with children will need to be considered.



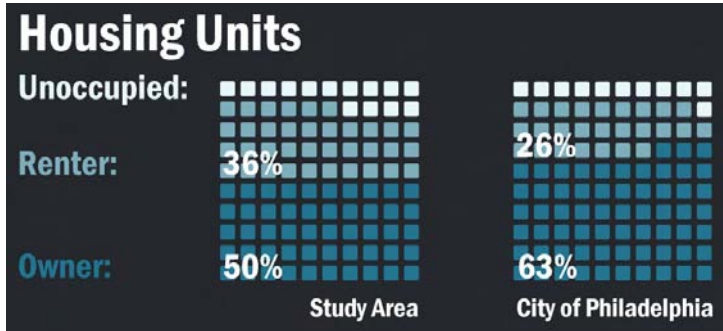
Race. Source: U.S. Census 2000



Population Age Distribution. Source: U.S. Census 2000

Homeownership

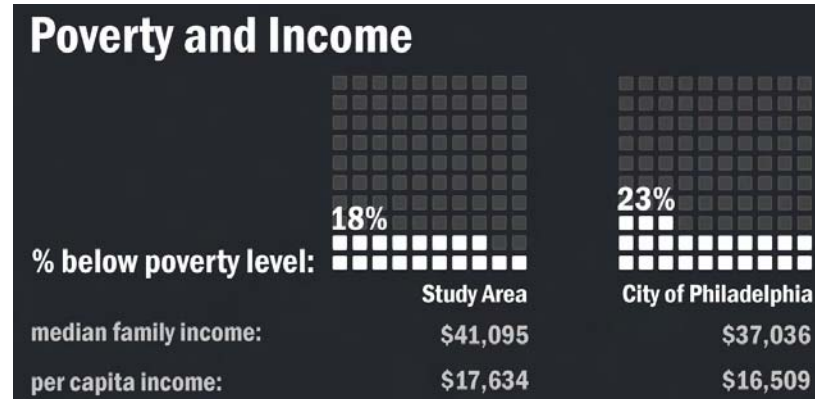
Homeownership in the study area hovers around 50 percent, which is lower than the City average of 63 percent. However, this is not too unusual, as commercial corridors typically have a much higher rate of renters. The indication from recent housing trends is that with increasing home values, more homes that were formerly rentals are transitioning to homeownership units for new residents.



Housing Occupancy. Source: U.S. Census 2000

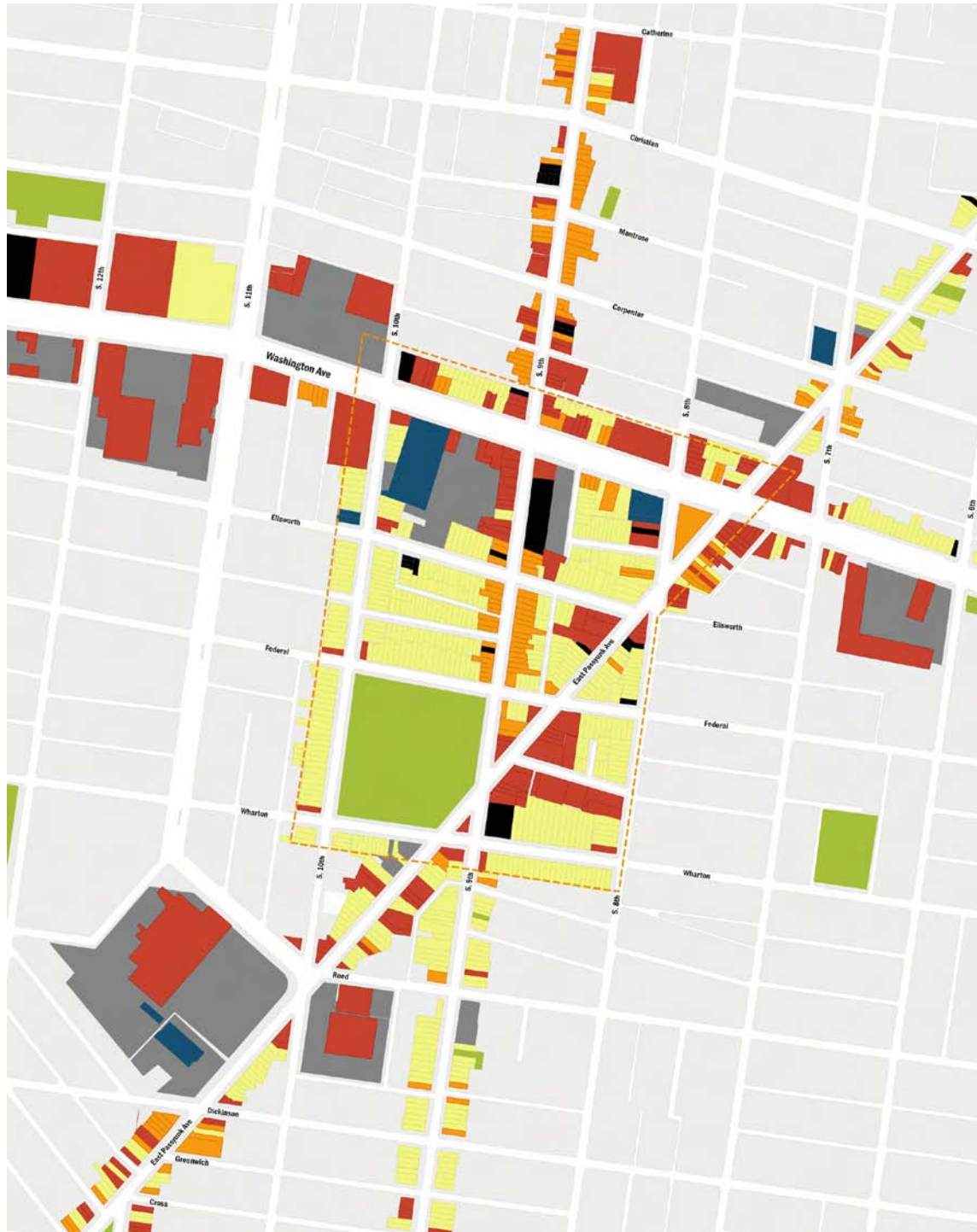
Poverty and Income

Both the median income and poverty rates for the study area compare favorably to the City. However, some have speculated that the problems associated with poverty are masked because residents who are undocumented immigrants and very poor avoid Census counts.



Poverty and Income. Source: U.S. Census 2000





Physical Conditions

Land Use and Zoning

The land use map represents parcel-by-parcel data surveyed in November 2007 and indicates how each property within the study area is currently being used. Additionally, the study area was expanded to include extensions of the major corridors in order to examine the business activity and use along them. Grasping the relationship between the study area and those spaces surrounding them is crucial to understanding the uses inhabiting the Lower Italian Market.

Land use within the study area is extremely mixed. Many of the properties along South 9th Street are either strictly commercial or commercial mixed with residential above. Buildings along Washington Avenue represent a mixture of commercial, institutional, and residential uses. The commercial uses are typically larger footprints and oriented toward the car including a lot of private, off-street parking space. The commercial uses shown on Passyunk Avenue within the study area are primarily auto-body shops that draw customers from a much larger area. The result is often cars parked on sidewalks at the expense of space for pedestrians. Surrounding these three corridors is a tight network of residential streets.

Land Use

Source: Field Survey

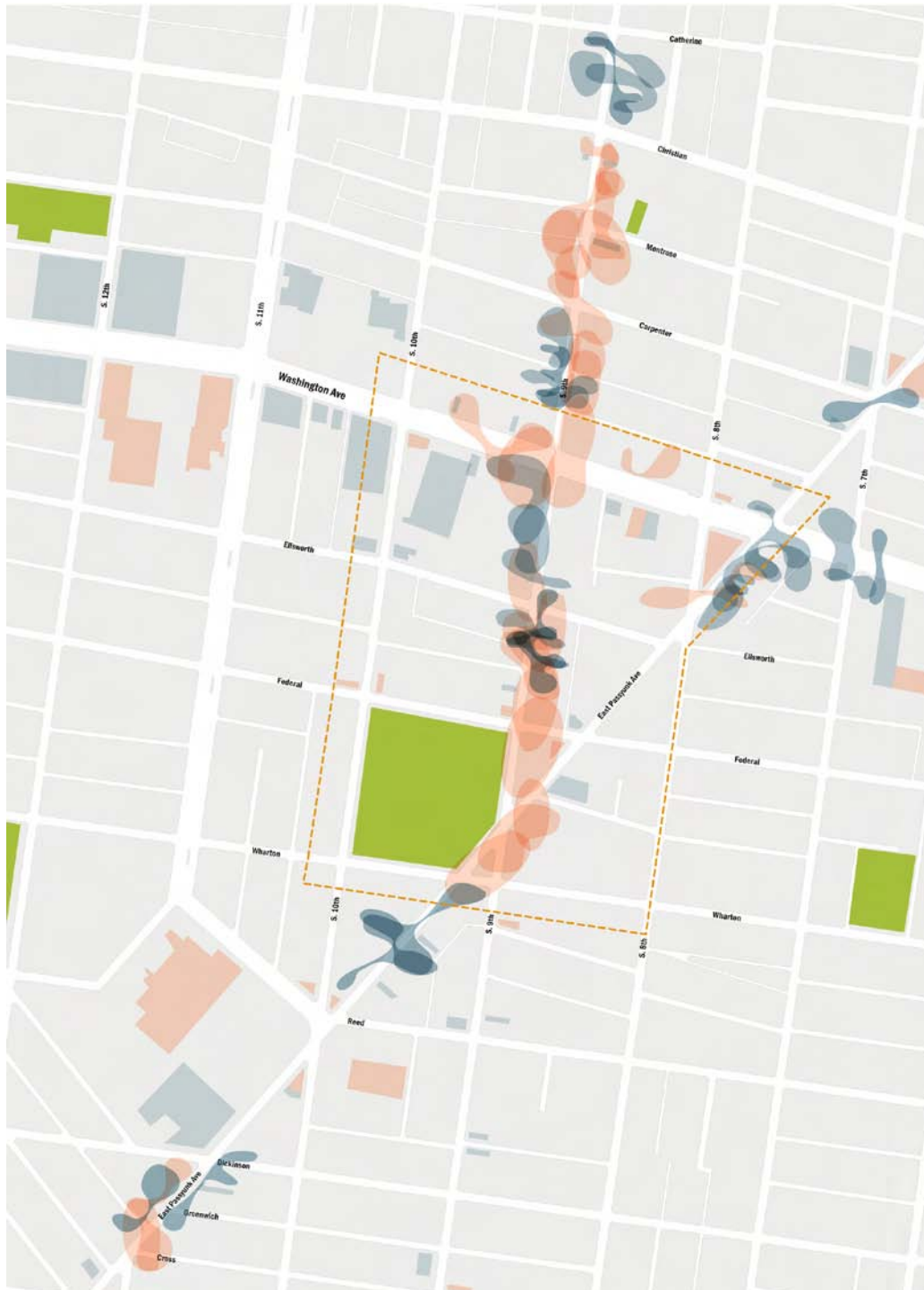
- Commercial**
- Residential**
- Mixed Use**
- Institutional**
- Vacant land**
- Pavement**
- Park**

The area's existing zoning in many ways reflects the existing land use observed this year. C2, a traditional commercial zone, encompasses almost all of the major commercial streets, and all of the residential is zoned R10A which is extremely common for Philadelphia's row house neighborhoods. A few properties are zoned C7 along Washington Avenue, allowing for a more auto-oriented development pattern.



Auto-Oriented Commercial Use
Source: Field Survey





Commercial Business Distribution and Activity

A full survey was conducted to identify the location and type of each store in the study area and along the length of the entire Italian Market. The Market north of Washington displays a greater concentration of food-related stores as well as a greater overall number of retail establishments. An analysis of food-oriented establishments versus non-food establishments indicates that the Lower Italian Market has more non-food retail interspersed with a handful of restaurants. The primary concentration of food-related stores stretches south from Federal to include Pat's and Geno's. By contrast, only one block of the upper Italian Market – primarily the west side of 9th Street and south of Carpenter Street – has any non-food related retail at all. The other main difference is in the type of food-related business. The Lower Italian Market is weighted far more toward restaurants and prepared food while the overwhelming majority of the Market north of Washington is oriented to produce, butcher shops, and specialty food products.



Produce and seafood sold in the Upper Italian Market, prepared food/restaurant in the Lower Italian Market.

Commercial Business Distribution

Source: Field Survey

- Food Related
- Non-Food Related



Hours of Operation

Source: Field Survey



The type of retail also determines how the Market is used over the course of a 24-hour period. Very few stores are open late into the evening which gives the Market a ghost town feel at night. In fact, the majority of the market is closed by 9:00pm with the exception of a few restaurants, Pat's and Geno's, and local bars. This is clearly readable in the map showing daytime (yellow) and nighttime (grey) uses with the circles representing the relative amount of activity each use generates in terms of customers.

Daytime and Nighttime Uses

Source: Field Survey



Vacancy

The Ice and Coal building, now a vacant lot, represents the largest and most visible void in the area. There are, however, other scattered vacancies from empty storefronts to vacant upper floors and a few entirely vacant buildings. The majority of the area's vacancy is distributed along 9th Street, clustered between Ellsworth and Federal in particular. While the vacant commercial spaces deaden the vibrancy of the retail corridor, the vacant upper floor units (in some cases, vacant storage) prevent the corridor from becoming a thriving, mixed-use 24-7 district. There are only a few vacant spaces on both Passyunk Avenue and Washington Avenue.



Vacancy

Source: Field Survey



Inactive Frontage

Compounding the negative impact vacant storefronts have on street life, is a number of other barriers that discourage people from walking south of Washington Avenue. These "inactive" frontages include vacant lots, construction fencing, chain link fencing, and blank walls. All of these features inhibit retail activity and signal that the area is closed for business. At night, a series of additional yet temporarily inactive frontages are noticeable in the form of opaque security grates. Encouraging semi-transparent security grates can have an immense impact on the perceived look and safety of the street at night, particularly because the awnings, such an identifiable component of the Italian Market's streetscape, prevent streetlight from reaching the dark sidewalks.



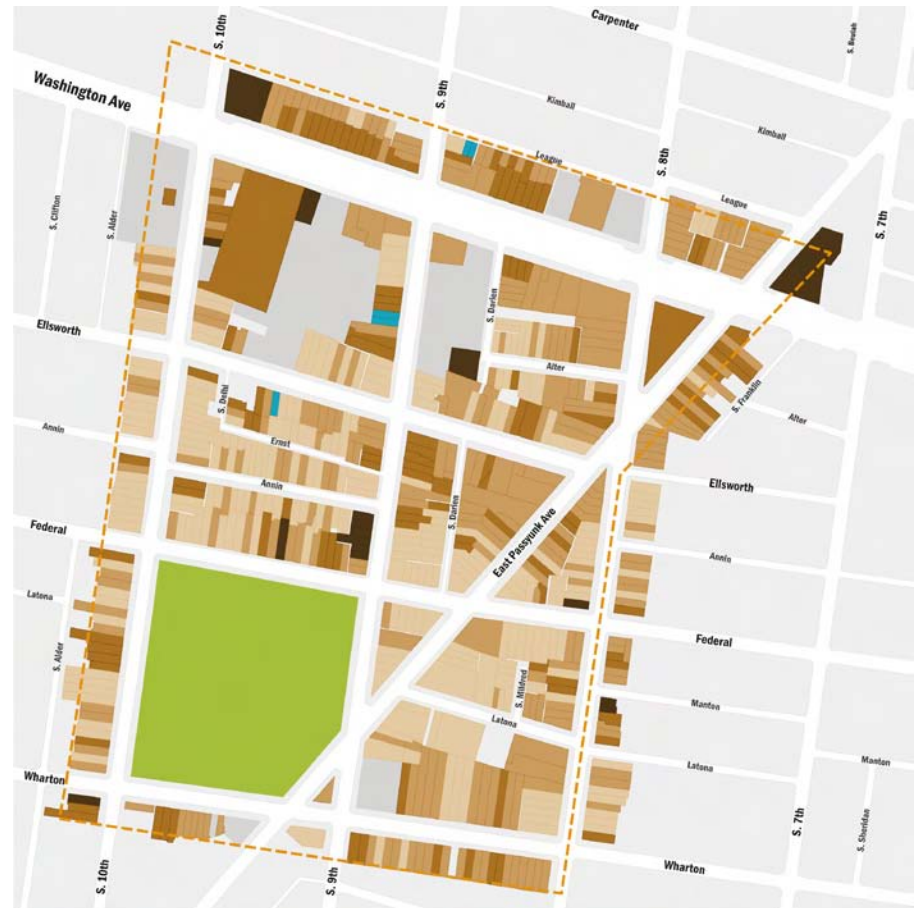
Inactive Frontage

Source: Field Survey



Building Condition

As a part of the parcel survey, our team ranked each building on a scale of 'A' to 'D.' The overwhelming majority of buildings were rated either an 'A' – excellent, or 'B' – good. The properties rated 'C' indicating some visible deterioration are mostly clustered on either 9th Street or Washington Avenue, with a few scattered along Passyunk Avenue. Only a handful of structures received a 'D' rating, indicating serious deterioration and blight. Most of these buildings are also on 9th Street and coincide with the pattern of vacancy in the area.



Building Condition

Source: Field Survey



Inactive Frontage: auto-oriented business



Inactive Frontage: closed businesses



Inactive Frontage: vacant land

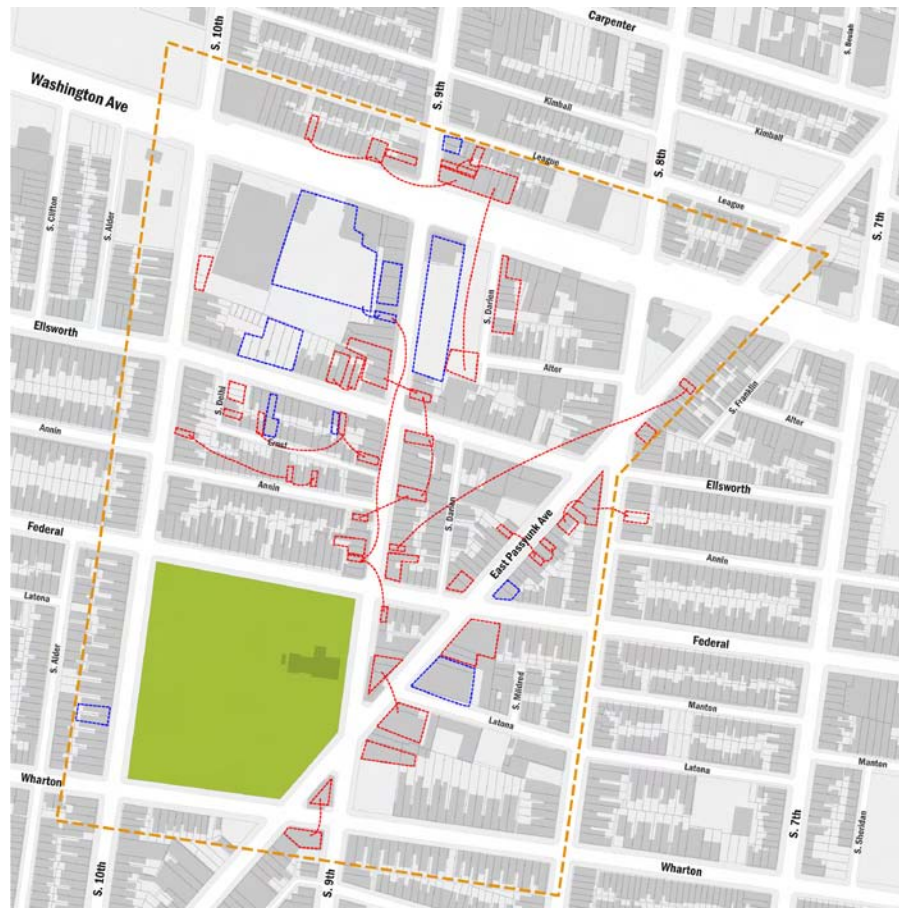


Inactive Frontage: park edge



Property Ownership

The families who have invested in the Market for generations still own much of it. Indeed, a review of ownership patterns reveals that a large number of properties in the study area are owned by the same person or family. In some cases, sons or daughters are maintaining different properties left to them by their parents. Multiple-property land owners account for over half of the total number of properties on both Passyunk Avenue and 9th Street. There is currently only one large publicly owned site in the study area – the parking lot on the north side of Ellsworth Street west of 9th Street. There is also a growing number of properties owned by different **“fictitious owners”** or Limited Liability Corporations (LLCs), entities that have purchased the land with the intent of redeveloping the property or reselling it for a higher price to a developer, demonstrating that the Market has potential value for investment.



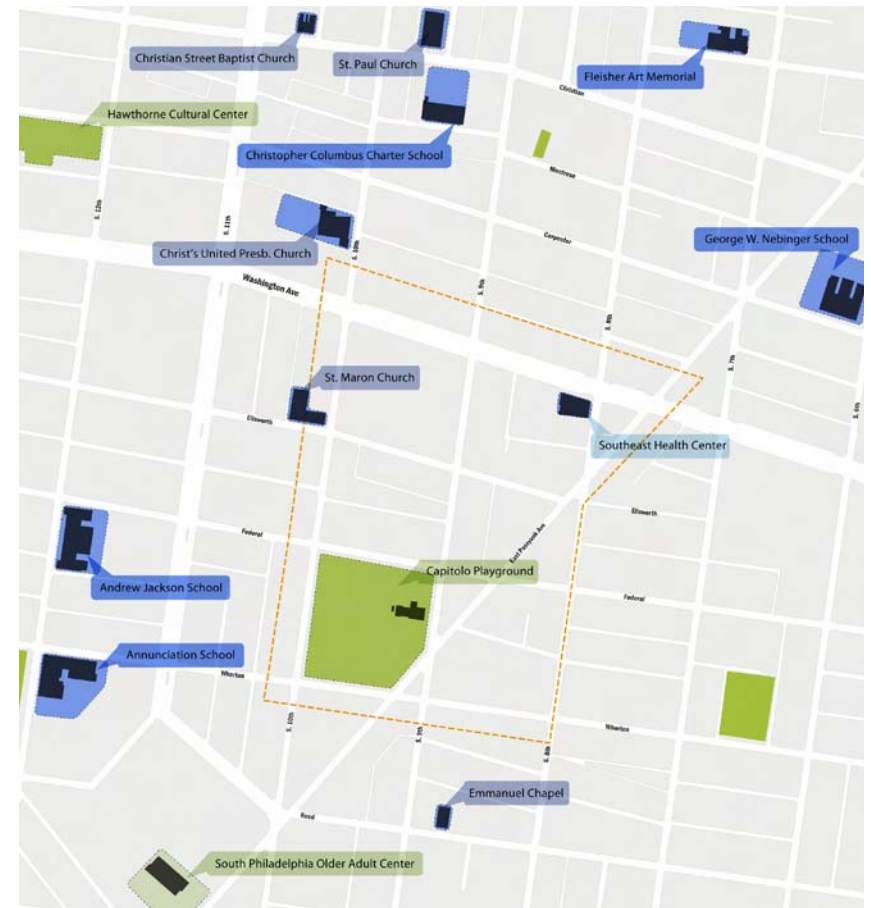
Multiple Property Ownership

Source: Board of Revision of Taxes

- - - LLC, Corporate, Public
- - - Private Individual

Institutional Uses

The study area is surrounded by institutional uses including schools, arts programs, churches, and a public library. Very few of these uses, however, are located in the study area. The main local institutions include the Southeast Health Center on Washington and St. Maron’s Church located at 10th and Ellsworth Streets. St. Maron’s has long served as the center for the local Lebanese community and has a very active parish. Its newly formed community development corporation (CDC) is interested in developing an affordable senior housing development to allow local residents to age in place.



Institutions

Source: Field Survey

- Health Facility
- School
- Place of Worship
- Department of Recreation Facility/Park

Capitolo Playground

Formerly the Lafayette Cemetery, Capitolo is an adequately maintained playground and the only green space is the study area. Many people that participated in this study noted a few ongoing concerns:

- The edges of the park are unwelcoming and a little worn down;
- There is not enough programming to meet the needs of the area's changing population;
- Portions of the park are sometimes abused by the late-night cheese steak crowd; and
- The recreation facilities require improved management and possibly a new design (there is an ad-hoc fence that separates the baseball field in the southeast corner from an un-programmed field typically used for soccer).



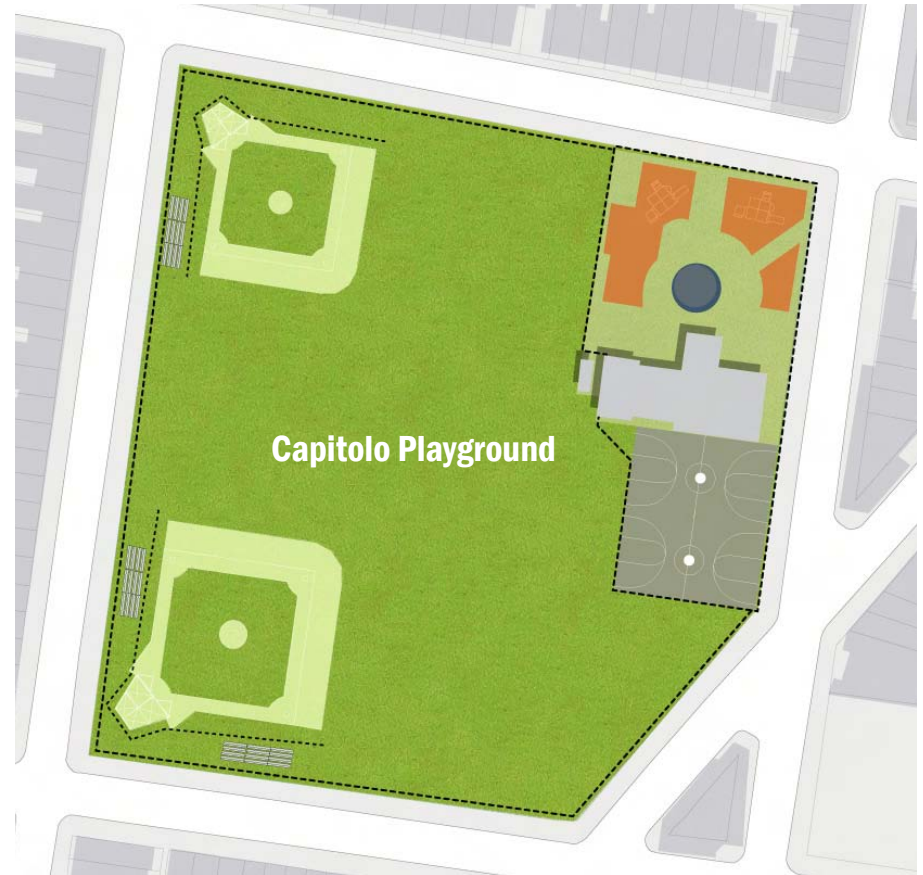
Capitolo Playground: elevated play area separated from sidewalk.



Capitolo Playground: encircled by fencing.



Capitolo Playground: make-shift fencing bisects field to create small space for informal soccer games.



Capitolo Playground.



Trees

The majority of the area's trees are located along 10th Street, around Capitolo Playground, and along portions of Passyunk Avenue, Federal, and Ellsworth Streets. The PSCA has taken an active interest in tree planting and has planted a substantial number in the community. Despite these efforts, the overall tree canopy (amount of land area covered by trees) is 2.1 percent. For reference, many cities set a goal of 30 percent.

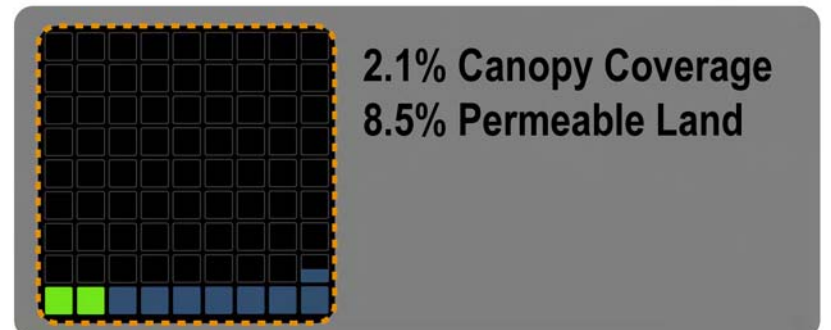
'Permeable' Land

The other concern in the area from an environmental perspective is the amount of permeable land. Permeable land allows water to slowly sink into the ground like a sponge as opposed to impermeable land that directs rainwater into local streets and sewers. As Philadelphia has combined sewers, sudden or heavy rainfall often causes back-ups in the streets and sometimes in peoples' basements. The more permeable land a community has, the better equipped it is to manage the stormwater and reduce flooding. The study area comprises only 8.5 percent permeable land, the majority of which is Capitolo Playground. For reference, other neighborhoods in the City exceed 20 percent permeable land, which is still a low figure.



Tree Coverage and 'Permeable' Surfaces

Source: Field Survey and Aerial Photography



Many of the residential streets are too narrow for tree plantings. Portions of Capitolo Playground are paved in asphalt, reducing the park's stormwater management potential.

“Life is much harder now, survival is tough.”

Econsult Corporation conducted the commercial market analysis for the Lower Italian Market Revitalization Project. Econsult’s report, including the full market study and subsequent recommendations, is included as an Appendix to this plan. The conclusions of Econsult’s analysis are summarized below, blended with the frank and candid comments of some of the Market’s key personalities.

Local Flavor, Synergy, and Competition

The Italian Market is a commercial corridor steeped in history and tradition. Its streetscape and atmosphere – complete with awnings and stalls, sidewalk vending, straightforward window displays, and authentic South Philly attitude – coupled with its flavors and reputation, have built and maintained its status as a tourist attraction. It is this destination status that has buoyed the market despite shifting spending patterns, shopping habits, and economic downturn. Rather than local customers shopping each day for day-to-day goods, **“discriminatory shoppers”** now comprise the customer base, and **“quality is the number one issue.”** Indeed, the Italian Market must regain its reputation as one of the best specialty food centers in the City in order to reverse the decline and thrive serving local and regional customers.

The Lower Italian Market, however, lacks the cluster of historic Italian businesses now famous within the Market and enjoys fewer synergies afforded by a continuous wall of retail uses. For these reasons, the Lower Italian Market is much less of a tourist attraction, if an attraction at all, and though evolving and neighborhood serving, must compete for attention not only with more modern shopping districts, but with the Upper portion of the Italian Market as well. If the traditional Italian Market north of Washington is **“struggling,”** which it is, those struggles are much more pronounced in the Lower Italian Market.

Evolving commercial market dynamics are not the only challenges facing business owners in the Italian Market though. The Italian Market itself poses challenges to business owners, both north and south of Washington Avenue. Common perceptions hold that parking resources are scarce, that the tenant mix is shifting and becoming more homogeneous rather than complementary, that image is suffering as is quality of goods, that the constrained shops and streets make discreet disposal of trash nearly impossible, and that the small footprints of retail spaces impose outdated and laborious retail practices on current owners.

“It’s tough to be a medium to large size operation in the Italian Market due to the physical size of the buildings. Businesses sacrifice much to be at this location, with multiple storage and cooling places all over the Market, multi-floor production areas – it’s highly inefficient.”

These harsh realities must be outweighed by the strength of the local and regional market to attract and sustain new commercial uses. At the same time, the market must attract and retain new businesses that are interesting to customers in order to build a strong market. It is, it seems, a case of the chicken and the egg.



Which comes first?



Above: Signage from the Upper portion of the Market. Below: The Lower Italian Market’s eclectic offerings.





Retail Supply and Demand

Econsult's retail market leakage analysis (published in full in the Appendix of this report) determined that the Lower Italian Market can sustain additional retail development to strengthen its role as a regional destination for produce, specialty foods, and related products. Leakage analysis measures an area's aggregate income and considers how much the average consumer spends on different retail categories, yielding an estimate of the total demand or retail potential for those retail categories. The model then calculates whether there is a gap between the level of demand and the level of supply of those goods by stores in the area.

In the Italian Market area, 40 percent of all retail establishments are food-related businesses, creating a market niche. Local residents demand nearly \$30 million dollars in food and beverages per month; the local supply totals \$50 million dollars in goods, resulting in a negative supply gap of \$20 million per month in that category. As Econsult explains, a negative gap suggests that the area has a cluster, or agglomeration, of goods, which draws from a wider secondary market. This is, in fact, the case in the Italian Market, and Econsult concludes that the Lower Italian Market should seek to fill vacant retail spaces with uses that build upon the corridor's reputation as a specialty food market, thus reinforcing the market niche.

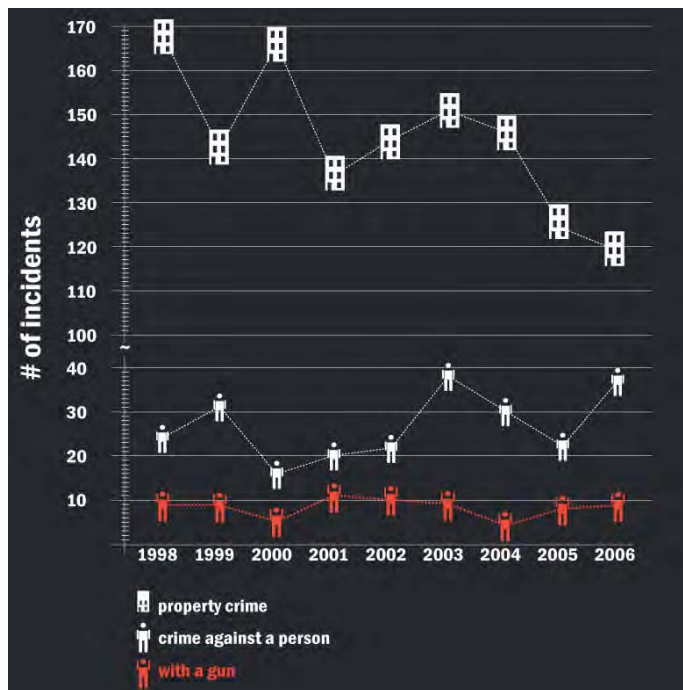
Crime and Public Safety

“South Street has 50 cops walking the beat there. We’ve got none on 9th Street because we make it safe and have for many years!”

Safety remains a serious concern for many who have provided input into this study. There is a general feeling that 9th Street is unsafe at night due to a concentration of day-time only uses, poor lighting, and loitering. Comparing crime rates to that of the City as a whole, the Lower Italian Market has a lower percentage of crimes against persons (assault, robbery, etc.) per 1,000 people but outpaces the City with regard to crimes against property (burglary, graffiti, vandalism). This is not uncommon, as closed stores are often targets for burglaries in the evening. Between 1998 and 2006, the property crime rate has declined in the area. The rate of crimes against persons, however, has recently increased.



Crime comparison.
Source: Cartographic Modeling Lab (CML)



Crime over Time.
Source: Cartographic Modeling Lab (CML)

Trash and Street Cleaning

A major complaint of residents and businesses, in particular, is the poor and unkempt appearance of the street. Despite efforts to sweep up the sidewalk, trash and debris returns the next day. Many factors contribute to 9th Street’s trash issues, including:

- While some business owners are responsible, others are not or are simply not aware of local rules and expectations. Enforcement of the laws on the books is lacking;
- The same is true for visitors, with a number of concerns raised about the lack of respect by some visitors who regularly litter;
- 9th Street generates both day-time trash and night-time trash. This round the clock production of waste inevitably finds its way to the sidewalk without regular pick up and cleaning;
- Vacant stores and the unwelcoming presence at night make it too easy to dump trash in the area. The Lower Italian Market is a place of least resistance at night, which only encourages poor behavior; and
- There is no one organization coordinating trash management and cleanliness for the entire corridor.



Litter and trash influence the streetscape in multiple ways.

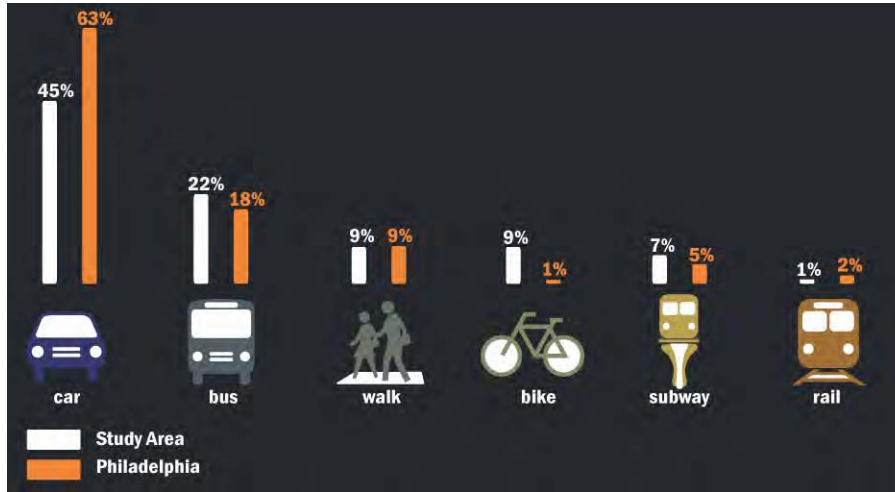


Transportation

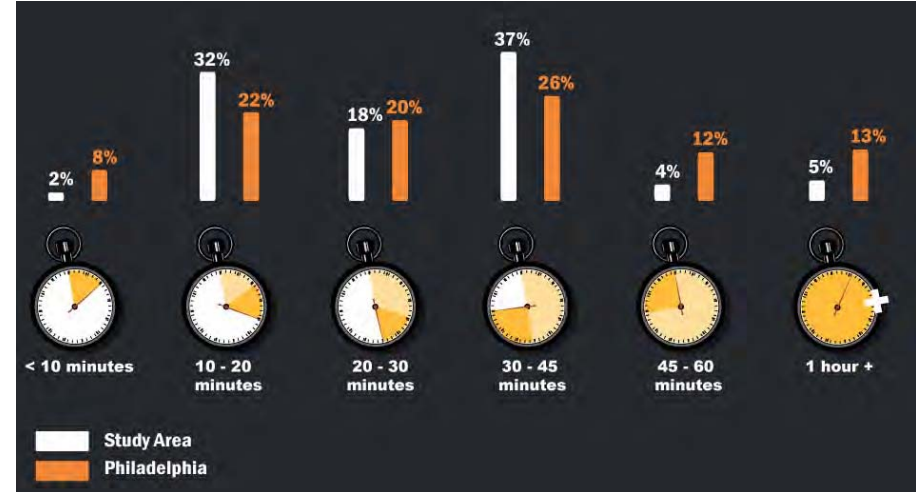
Commute Mode and Time

People living around the Lower Italian Market drive less, take more public transit, and bike significantly more than the typical Philadelphian. The growing number of bicyclists is evident from the use of the street's awnings as ad-hoc bike racks. While the highest percentage (37 percent) of residents have 30-45 minute commutes to work, 50 percent of residents have between a 10 and 30 minute commute to work, which reaches the majority of Center City.

While residents take different modes of transportation to work, a critical issue is how people come to the Italian Market to shop. From local interviews, the majority of customers for Pat's and Geno's come by car or taxi. On a Saturday, many visitors come to the Italian Market by a mix of car, transit and walking.



Commute Mode. Source: U.S. Census 2000



Commute Time. Source: U.S. Census 2000



The Pedestrian Environment

“The biggest challenge of the Italian Market Festival is to get people to cross Washington.”

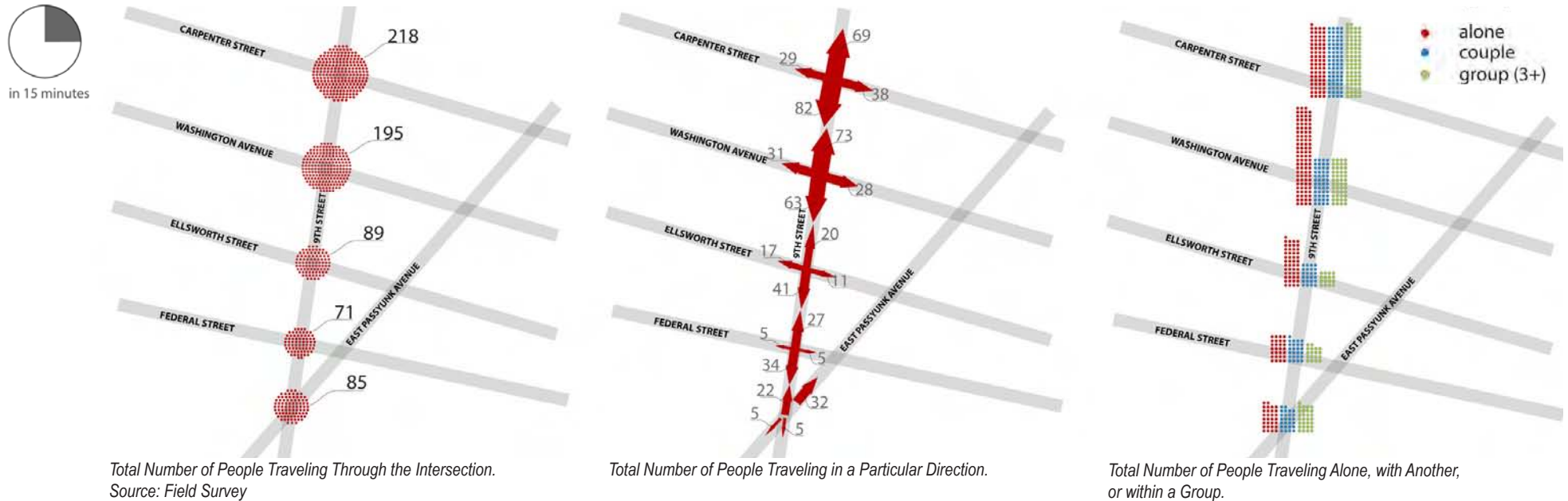
Although the Italian Market is geared toward strolling, the Lower Italian Market lacks a number of pedestrian amenities that would encourage people to walk. The lack of a strong retail core is perhaps the major factor, but the following factors contribute to an at times inhospitable pedestrian environment:



Washington Avenue.

- The Washington Avenue and 9th Street intersection is dominated by cars and traffic. The width of Washington Avenue, faded crosswalks, limited signage, and visible vacancy south of Washington effectively end the journey for many pedestrians;
- Sidewalks are, at times, in deteriorated condition and made worse by continued issues with trash – littering, short-dumping, and collection;
- Many of the awnings are in disrepair and uncared for. The awnings were not replaced as a part of the awning improvement project in the 1990s, which targeted 9th Street north of Washington Avenue; and
- The street stalls are not active south of Washington making the sidewalks appear inactive compared to the vitality north of Washington. Stall licenses are privately owned.

All of these factors confirm observations along 9th Street. Our team observed pedestrian movements at five intersections along 9th Street – Carpenter, Washington, Ellsworth, Federal and Passyunk – each for 15 minute intervals. The number of pedestrians drops dramatically south of Washington Avenue. So too does the percentage of those walking in a couple or group where the majority of those walking at the Ellsworth Street intersection are singles. The percentages of those in a couple or group pick up again south of Ellsworth around Pat’s and Geno’s which indicates that many come to these restaurants either from the south or by car.



Parking

“The lifeblood of the Italian Market is parking.”

Business owners and residents alike complain that there is not nearly enough parking. It appears drivers feel the same way, at least in terms of cheap on-street parking, because numerous people have expressed their frustration with visitors “cruising” the neighborhood looking for on-street parking. This causes traffic congestion and conflicts with pedestrians and bicyclists alike.

Demand is clearly high for parking, but much of the available supply is either unused or not used efficiently. The pay parking lot west of 9th Street with access from Washington Avenue was only 60 percent full on the Saturdays our team surveyed parking occupancy. On-street spaces were also available around Capitolo Playground during that same time frame. On 9th Street, inefficient use of on-street parking spaces is regularly visible. Trash and other items from local merchants often appropriate what would normally be a parking space, as do unused vending stalls, which stand unoccupied along the street.



Lot empty on a Saturday at noon.



Block by block parking occupancy. Source: Field Survey



Parking Occupancy: Saturday at Noon

Source: Field Survey

- 100% Occupied
- 60-99% Occupied
- 60% or Less Occupied
- Informal Parking Area

Street Network

Except for Washington Avenue, all streets in the study area have a one-way traffic flow. With both Passyunk Avenue and 9th Street heading northward, there is a lot of traffic that turns left onto 9th Street from Passyunk. This traffic flow makes the connection between these two retail corridors very important in terms of marketing.



Street Network

Source: Field Survey

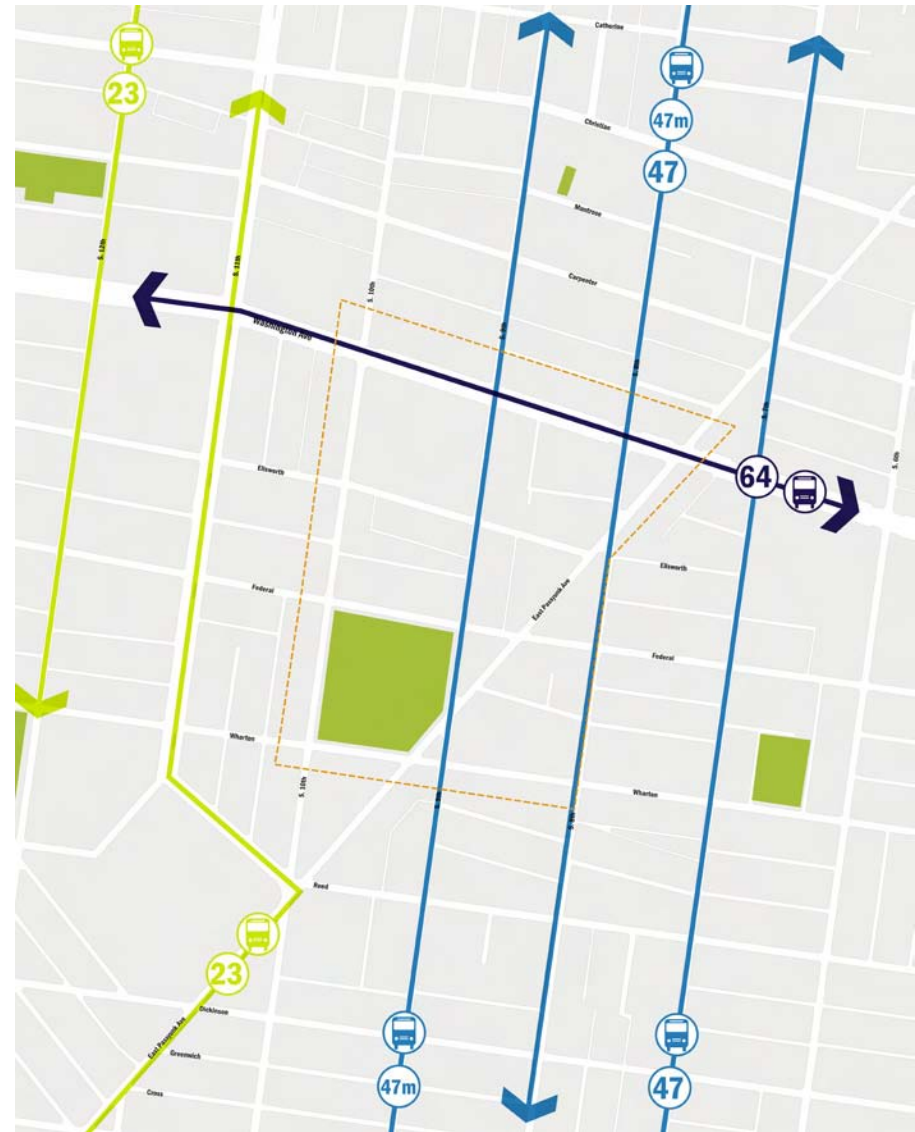


Public Transportation

Source: Septa

Transit

The Broad Street Subway is within a ten minute walk of most of the study area, but the most convenient transit choice is the bus network. The only east-west route is the 64, which runs on Washington Avenue. Route 23 runs north-south on 11th / 12th Streets, and Route 47 operates along 7th / 8th Streets. The only bus that runs along 9th Street is Route 47M, but the frequency of service is limited, with wait times of twenty to thirty minutes, as are the hours of operation, 9:00 AM to 5:00 PM only.



Summary of Key Issues

After discussing the findings with the PSCA Planning Committee and conducting numerous interviews with business owners, stakeholders, long-time residents and new residents, the team identified a series of ten critical issues facing the Lower Italian Market and threatening its healthy development.

1 Tension between new and old residents

Like any neighborhood beset by rapid change, misperceptions persist that divide new residents from the ‘long-timers.’ There is the feeling that some of the new people coming into the neighborhood are not necessarily building relationships with the current residents – **“they weren’t raised with the community mentality of helping neighbors, of taking care of business whether it’s yours or not.”** At the same time, there is a feeling that some of the current residents are not welcoming to newcomers. Outgoing or introverted, welcoming or not, the main difference is in values and their aspirations for the future. Long-time residents often express a desire to bring the market back to its former glory but also have specific concerns about their ability to afford to stay in the community as they age. New residents have no nostalgic backdrop to pull from and bring their own specific concerns and ideas generated from their experiences elsewhere. The PSCA General Meetings have proven to be a great forum for discussing the differences, and shared concerns, between new and old residents.

It should be noted that some of this tension is racially motivated. The influx of Asian and Mexican residents has made what has always been a diverse community now diverse in a clear and visible way. Concerns about business practices, language gaps, and the mix of stores have been raised throughout the planning process, but there has also been much interest in and respect for these new residents of different backgrounds. The challenge is to capitalize on the area’s diversity in an open and inclusive manner.

2 Marketing and identity

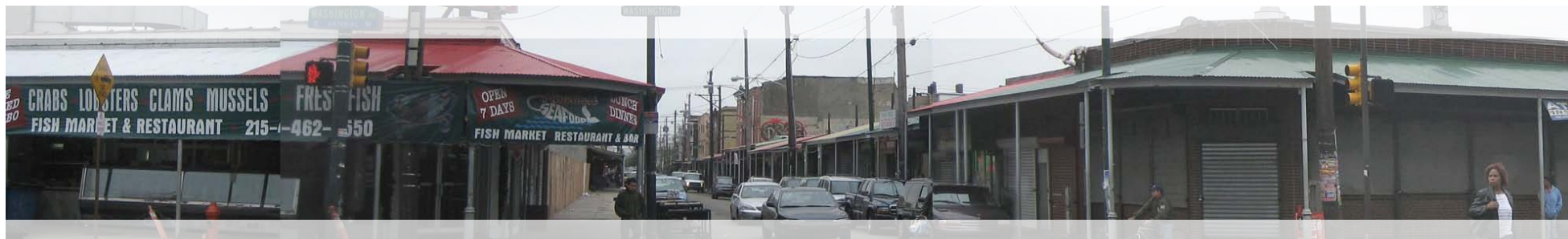
What is the identity of the Lower Italian Market? Is it different than that of its northern counterpart or more related to Passyunk Avenue? The Lower Italian Market has many personalities which are continually evolving. Residents frequently asked what the potential can and should be.

3 Retail mix

The history of the Italian Market has always been tied to its local families and relationships. Businesses reflected this local sensibility, and the stores that characterize the Market distinguish it from other commercial corridors because they are unique and local, independent and authentic. The redevelopment of the Ice and Coal site will offer a large space that could be filled by any number of stores. Many in the community are concerned that the balance of the Market remains local in character and spirit rather than becoming a location for chain retail. **“Chain retail would kill us!”**

4 Ice and Coal site

The long vacant Ice and Coal building is now gone and replaced with a vacant site awaiting redevelopment. Residents expressed significant concerns about both the long-term and short-term plans for the site. What type of retail will occupy the ground floor, and what will the new building look like? In the meantime, are there temporary uses or public art that can be used to transform an eyesore into something productive until the site is redeveloped? Will the national housing market collapse affect the site’s redevelopment, and if so, how?



5 Parking... and the perception that there is none

The three main corridors in the study area – 9th Street, Washington Avenue, and Passyunk Avenue – are dominated by cars. From parking to traffic congestion, concerns about how to accommodate the car regularly arise in conversations with residents and business owners. The more the Market accommodates the car, the more cars it will attract and, subsequently, the more issues it will have with parking and congestion. Strategies must balance the demands of the car while promoting alternative forms of transportation like bicycling, walking, and transit. Existing parking must be better managed such that it more efficiently serves the demand.

6 Auto-centric land use

The presence of auto-body shops and auto-oriented retail along both Washington and Passyunk Avenues draw cars to the area but also create frequent conflicts with pedestrians due to curb cuts and parking on sidewalks. The blank walls often associated with these uses also create dull spaces along streets that deaden the street life and character and make the area feel unsafe and unwelcoming.

7 Pedestrian safety and amenities

In constantly worrying about the car, it is easy to forget that the Italian Market is a pedestrian experience, designed to be tactile and engaging at slow speeds. The Lower Italian Market, however, is not often welcoming to pedestrians. Deteriorated crosswalks, lighting, signage, and a lack of street furniture coupled with no real sense of the commercial offerings that exist in the Lower Italian Market discourage people from venturing south of Washington Avenue.

8 Neighborhood greenness

Constrained by the dense historic development patterns of the area, the community around the Lower Italian Market has very few trees and very little permeable surface that can help to manage stormwater runoff. PSCA has done much to plant new trees in the community, encourage recycling, and organize community clean-ups. This activity has generated interest in additional measures to help the lower Italian Market grow greener, but much remains to be done.

9 Park access and programming

Capitolo Playground is a major amenity but needs improvement to meet the needs of the community today. Its exterior fence and concrete wall are deteriorating, the recreation facilities are not tailored to how the space is actually used, and many have indicated the need for additional programming for seniors and children.

10 Trash pick up and street cleanliness

It is no secret – the Lower Italian Market is often characterized by trash on the sidewalks and in the streets. To some extent, this is normal. Active commercial spaces always generate trash. The presence of trash on the street only indicates that the corridor is actively used. While some portions for the Lower Italian Market require constant trash pick-up because of continuous activity (Pat's and Geno's for instance), other areas are trash-strewn because of vacancy and a sense that no one is watching.





recomm^ondati^ons

V Goals and Vision

In response to the 10 key issues confronting the Lower Italian Market, the Interface Studio team together with the PSCA Planning Committee and the larger Passyunk Square community generated a list of goals that the plan should seek to achieve through its recommendations and implementation.

- 1. Get to know the neighbors**, their memories and histories, their priorities for the future. Learn to depend on them to help you reinvent the southern end of the 9th Street Market. Broaden public outreach to engage a representative cross-section of the community.
- 2. Take a look in the mirror.** Recognize and strengthen the Market's identity. Adopt a market-based identity for local business. Build upon its reputation as a destination for specialty foods, but broaden its offerings with complementary retail uses that add variety and character, especially in the vein of arts and culture. Nurture an identity that is grounded in, yet distinct from that of the traditional Market, which lives on north of Washington Avenue.
- 3. Broadcast the Market's identity to put South 9th Street back on the map in new ways.** Begin to attract new visitors independently of the traditional Market and the cheese steak joints.
- 4. Reinforce the Market's local flavor and authenticity.** Encourage and support small, local, and/or family-owned businesses along the corridor.
- 5. Reinforce the Market's long-term viability.** Strengthen the corridor's links to surrounding neighborhoods, the city, and the region.
- 6. Facilitate peoples' arrival in the Lower Italian Market.** Lessen the perceived physical boundary created by Washington Avenue. Promote travel to and from the corridor by multiple modes, particularly by bicycle and on-foot.



- 7. Don't wait for a catalyst project to jump-start this change.** Initiate temporary uses to activate the corridor *now*.
- 8. Embrace the corridor's *urban marketplace*.** Promote mixed use development that brings new density and activity to South 9th Street, new shops and new venues, new residents and new customers. Remember that the market thrived when these groups were one and the same. Mix some green and some green development into the corridor's mixed use equation.
- 9. Balance lived-in with livable.** Savor the grit and the rhythms that are inherent in the Market's operation, but improve South 9th Street's cleanliness and appearance enough to encourage people to linger a little longer and return a little sooner.

Goals speak to values and priorities, hopes and dreams, which in turn inform a shared vision for the South 9th Street Corridor: a corridor back in business and back on the map as an eclectic and evolving hub of living history and a vibrant collection of shops and eateries, serving the neighborhood, the City, and the region. The future Lower Italian Market is at once familial and authentic yet diverse and diversifying, intimate and underground yet a recognized destination, dense and urban yet green.

VI Recommendations

The vision translates into a series of six opportunity topics, each of which encompasses a set of recommendations for the revitalization of the Lower Italian Market. Together, these recommendations form a comprehensive strategy for the corridor.



I Building Community

The Italian Market has always been a melting-pot, a sponge absorbing growing immigrant communities, and a nesting place where newcomers live, work, and shop together – a home away from home. While the Upper portion of the Italian Market has a large number of uses and stores that have remained over the years and fostered an air of stability, the character and population of the Lower Italian Market visually represents change. The Italian Market was never singularly “Italian” of course, but the more recent influx of new immigrants and stores that cater to their needs do represent a shift in the Market’s identity. This change is embraced by some but raises concerns among others. As the Italian Market has endured over a century of change and flux, a central tenet of the Lower Italian Market’s future must be to integrate and embrace diversity in ways that reinforce the larger identity of the Market. For this to occur, all populations must have a voice at the table and play an active role in the coming future. The PSCA is positioned to guide this dialogue and build stronger links within the community.



Many things, stitched together.

The following recommendations detail ideas for increasing communication, trust, and pride within the Lower Italian Market community:

I.1

Welcome the Neighbors.

In the Lower Italian Market and its surrounding residential streets, meeting the neighbors is no small task. As a hub of immigration, the area’s population is, in one sense, constantly in transition. New neighbors may settle or set up shop in the Market intending to stay, or may stay only briefly, relying on familial or community ties to help with housing and work before moving on. And while this dynamic makes it difficult to determine a new neighbor’s interest in community involvement, language barriers often complicates such relationships. On the flip side of the coin, as real estate values appreciate and market pressure in the area builds, rehab and development is accelerating, attracting another set of newcomers – perhaps more permanent, perhaps not – to the neighborhood. In both cases, new opportunities and new homes translate into new faces, and in the face of such change, an open and friendly neighborhood will become a stronger, more trusting and unified community.



Multi-lingual public outreach.

The PSCA should establish a Welcoming Committee or evolve the Communications Committee to focus on community outreach with an emphasis on involving representatives from different cultural groups. With native speakers of English, Italian, Mandarin, Vietnamese, Spanish, and Arabic on board, the Committee should employ multi-lingual postcard and/or flyering campaigns to invite all residents, especially the new ones, to come out to meetings, meet the neighborhood, and get involved.

Ultimately, the Committee's role is twofold – to greet newcomers and to foster relationships between long-term residents and their new neighbors. As such, the Committee should coordinate the following three recommendations:

1.2 Create an Informational Brochure.

Plates of cookies to greet the new neighbors are great, especially in the Italian Market where pastries achieve an art form (so if you feel inspired, please, by all means...). But information is both cheap and priceless – and these days easier to share. The PSCA Welcoming or Communications Committee should prepare a Welcome to 9th Street brochure, available to all residents, but to new neighbors and businesses in particular. The brochures should include some basic information:

- **Neighborhood history** – provide a sense of continuity amidst change and bring newcomers up to speed on the rich history of the community and commercial corridor they now inhabit;
- **Neighborhood services** – demystify the trash schedule, the recycling opportunities, the bus routes, etc. Include the numbers and web links already posted on PSCA's website, www.passyunk.org;
- **Neighborhood institutions** – locate schools, churches, temples, health clinics, and community centers and advertise their available services;
- **Ninth Street Business Listings** – where to shop and what not to miss;
- **A PSCA Calendar of Events** – where to be when, and why;
and
- **A Volunteer Sign Up Sheet** – help people to match their skills and interests with the needs of the neighborhood.

For new businesses, the Welcome to 9th Street brochure might also include information about small business assistance resources, business plan development, and local “business buddy” contact information to link newcomers with experienced 9th Street shop-owners who are willing to offer advice and how-to guidance, share stories, and explain expectations.

Publish the brochures in all necessary languages, post them on the PSCA website, and make them available at PSCA General Meetings. If you need to, fall back on old habits, and hand-deliver with cookies.



Cookies are always good.

1.3

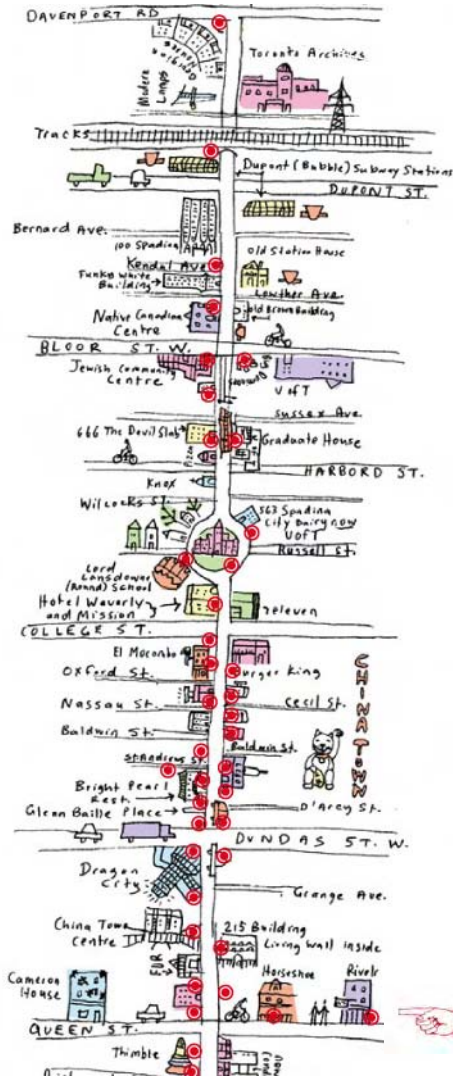
Develop Web-Based Artworks Dedicated to the Exploration of Contemporary Immigrant Experiences.

Much of the “local” population has come to the Lower Italian Market from elsewhere, bringing with them stories from past experiences and far away places and writing new stories as their lives take root along South 9th Street and its surrounding streets. Use storytelling and sharing to uncover the perhaps surprising commonalities and celebrate the differences between local immigrant experiences. Use the web as a tool to collect, communicate, and enrich the hidden narratives and histories of the Lower Italian Market.

Beautiful and compelling examples exist of web-based storytelling initiatives underway in other cities, some of them tailored specifically to the exploration of the contemporary immigrant experience. Look to Murmur in Toronto (<http://murmurtoronto.ca>), which ties recorded oral histories to an online map of specific districts in the City. Murmur’s stories can also be accessed via cell phone as people explore the city streets.

“the city is full of stories, and some of them happen in parking lots and bungalows, diners and front lawns. The smallest, greyest or most nondescript building can be transformed by the stories that live in it.” - Murmur

Also investigate the Lower East Side Tenement Museum’s Digital Artist in Residence Program (DARP) in New York City (<http://www.tenement.org/darp.html>). Tap local creative interests and technology talent to give the corridor’s untold stories a visual form and web presence; tap local chatter bugs to get people talking.



Click to hear a story.
Source: www.murmurtoronto.ca



Digital Artist in Residence Program project, Gods of Chinatown.
Source: www.tenement.org/darp

I.4 Curate an exhibit on local immigration to describe the area's rich cultural history.

The web is an increasingly important tool for information distribution and consumption, but the Lower Italian Market's rich cultural history should find expression in physical form – right there on 9th Street – for the people who might not otherwise know (how) to look for it. Until the renewed strength of the retail market reopens shops in every storefront along South 9th Street, the PSCA should rent a space for display and exhibits. The displays could take the form of a video installation that lights up a vacant window with imagery and information at night (meet your neighbor, founder of the Klip Collective, <http://klip.tv>) or a storefront exhibit of old photos, maps, and posters. Reclaim a vacant space, reactivate the streetwall, host an opening, meet your neighbors, and enjoy the flavors of the Lower Italian Market. While you're at it, learn your history and build local pride within and about the immigrant community.



Above: Vacant storefront, existing.
Right: Vacant storefronts temporarily reclaimed for neighborhood exhibit and opening, proposed.



2 Developing Identity (and flaunting it)

The Italian Market is a long-standing, well established, and marketable corridor with a powerful history and buzz of activity that will live on for decades. South of Washington Avenue, however, the legacy of the traditional Italian Market is no longer quite as apparent, and today, there is opportunity to redefine the Lower Italian Market's image and identity. The Lower Italian Market is in close proximity to the emerging Passyunk Avenue hipster scene, while also strangely situated among auto, dense residential, and pseudo-commercial uses that are specifically tailored to particular demographics. Is the goal to extend the Italian Market's identity south along 9th Street or to pull the identity of Passyunk Avenue northward? Perhaps, fusing the character of these corridors to become a unique spot between communities is more appropriate.

Ultimately, the corridor's reinvigorated commercial mix will, in large part, form the basis for the Lower Italian Market's revitalized identity, branding, and marketing. What types of commercial establishments would help build a viable identity, complement existing businesses, reinvigorating the community without compromising existing business owners? The following recommendations detail ideas about what the Lower Market's identity should be and how to market that identity:



It's about food.

IDENTITY

2.1 It's About Food.

As detailed in Econsult's report included in the Appendix of this study, the Lower Italian Market's commercial identity should remain grounded in all things edible and delectable. Although interviewees expressed concern that grocers saturate the market, and that the Market should diversify to offer a greater range of products and services to the visitor, Econsult's study states that variety can be found in food and food-related uses and that the most important aspect of new commercial development is that it be high quality.

Econsult recommends *unusual*, non-chain, specialty supermarkets, large restaurants, and food-serving entertainment venues to serve as much needed retail anchors, stores that offer upscale meat, cheese, fish, organic, and ethnic products to attract both local and regional customers. A beer store, a wine and liquor store, a florist, and new bars would support the Lower Italian Market's new identity as an upscale food-oriented market.

Proposals for commercial development should be reviewed on a case-by-case basis, however, as certain chains or locally-owned franchises may be acceptable to the community provided that the overall retail mix works.

TYPE OF USE	SQUARE FEET	ANCHOR	APPROPRIATE FOR 9 th STREET
City and Regional Market			
Specialty Foods	22,500 to 45,000	Yes	Yes
Produce Market	22,500 to 45,000	Yes	Yes
Organic Food Market	22,500 to 45,000	Yes	Yes
Full Service Restaurant (with arts venue)	22,500 to 45,000	Yes	Yes
Neighborhood Market			
Grocery store	10,000 to 22,500	No	Yes
Full Service Restaurant (without arts venue)	10,000 to 22,500	No	Yes
Ethnic food markets	10,000 to 22,500	No	Yes
Liquor and beer	10,000 to 22,500	No	Yes
Coffee shop	1,000 to 5,000	No	Yes
Florist	1,000 to 5,000	No	Maybe
Hardware Store	1,000 to 5,000	No	No
Pharmacy	1,000 to 5,000	No	No
Bank	1,000 to 5,000	No	No
Pet Boutique	1,000 to 5,000	No	Maybe

Retail Potential. Source: Econsult Corporation

2.2 It's About Local and Global.

Local – Conversations with local residents and businesses about the future mix of commercial uses in the Lower Italian Market reveal a shared aversion to national retailers. Indeed, most of the businesses in the Italian Market and the Lower Italian Market are family owned, locally managed, and supportive of a local first appeal which makes the area unique. While the smaller spaces available along South 9th Street may inherently attract smaller-scale, locally-owned businesses, the larger anchor developments may present opportunities for chain-retailers to infiltrate the corridor. Econsult recommends that PSCA reach out to existing local stores who may be interested in growing in size as potential tenants for new anchor spaces in the Lower Italian Market; these include: Anastasi Seafood, Sarcone's Bakery, Di Bruno Brothers, and Talluto's Pasta and Cheese.

The PSCA should also work with corridor retailers and the Merchants' Association to strengthen a Buy Local campaign on the market. Locally-owned businesses should receive stickers in their front windows that advertise them as such.

Global – part of what distinguishes the Lower Italian Market from the Upper portions of the corridor and other shopping districts in the City, however, is that in addition to being locally-owned, many stores are global in ownership, customer-base, and products sold. The Lower Italian Market should embrace and advertise this unique characteristic where older Italian establishments stand adjacent to newer Mexican, Chinese, or Vietnamese-owned businesses. According to Econsult, ethnic food stores and shops add variety to the retail mix, while enhancing the corridor's reputation as an ethnic market, fulfilling the needs of a growing immigrant community, and providing new retail options for groups outside the target ethnic group.

Consider rebranding the Lower Italian Market as the 9th Street Market, marking a return to the corridor's historic name and a more accurate description of the corridor today.



It's about local...



and global.

2.3 It's About an Emerging Reputation as an Underground Center for Culture, Arts, and Off-Beat Creativity.

The Lower Italian Market's emerging identity should strive to balance the desire to become more established with the desire to remain neighborhood-serving, off-beat, and gritty. As non-traditional forms of art and creativity take root in the area, the Lower Italian Market should become more of an underground center for arts and culture. Econsult suggests that small-scale food-serving arts and cultural venues (like galleries, performance spaces, and restaurants that showcase live or visual art) would complement existing businesses and help to extend the corridor's business hours into the evening.

One potential match for a creative event on the corridor is the BBoy BBQ, hosted annually, until recently, at the Hawthorne Recreation Center at 12th and Carpenter Streets. The event, which showcases "all disciplines of hip hop featuring live DJs, graffiti, breakdancing, and MCs," was recently ousted from Hawthorne due to concerns about increased graffiti vandalism in the neighborhood post-event. Why not close off South 9th Street for a day and invite the BBoy BBQ? Storefront exhibits (Recommendation 1.4) and temporary art installations (Recommendation 3.2) will further reinforce the creativity locating along or near to the corridor.



It's about off-beat creativity, arts and culture.



It all comes together on 9th Street, where people meet and flavors blend.



*Logos for a Chicago business improvement district reflect and market the local ethnic diversity.
Translations: blue, Polish, "We are WPB;" green, Spanish, "WPB works."
Source: Wicker Park Bucktown SSA#33*

FLAUNT IT

2.4 Embrace the Cultural Diversity of 9th Street, Where People Meet and Flavors Blend.

The name Lower "Italian" Market tells only a portion of the corridor's history and unfolding future. Embrace and advertise the uniqueness of its cultural diversity with a new logo and signage for the "9th Street Market" corridor that presents all text not only in English, but in Italian, Spanish, Mandarin, Vietnamese, French, and Arabic as well.

2.5 Host a Taste of the Lower "Italian" Market Event.

Celebrate global flavors and new food and dining venues on the corridor with an event distinct from the Italian Market Festival that showcases ethnic foods and beverages now available along the corridor. Market and raise funds for the event with the sale of a new 9th Street Market cookbook that offers recipes for eclectic global cuisines, educates people about unfamiliar ingredients, and advertises locations on the Market where such products are sold.

2.6 Advertise in Visible Locations to put the 9th Street Market on the Map.

Put the 9th Street Market on the map with unique and highly visible signage that attracts visitors independently of the influence of the Upper Italian Market to the north or the cheese steak dueling grounds to the south.

- **Broadcast the Lower “Italian” Market’s local/global vibe** – Consider commissioning a “Sister Cities” sign for placement at the Crab Shack site on Passyunk that points to nearby destinations and to the cities and countries from which local residents and businesses have moved. Alternatively, consider a cluster of Cypress Trees, common in Italy and throughout the Mediterranean, to symbolize the area’s heritage at this location.
- **Populate Washington Avenue’s median with a highly visible sign near the center of the intersection** – Signal to shoppers in the Upper portion of the Italian Market that rich shopping opportunities continue south of the divide as well (Recommendation 4.1).



2.7 Pursue Marketing Opportunities with the East Passyunk Avenue BID.

Partner with the adjacent East Passyunk Avenue Business Improvement District (BID) and the Italian Market Merchants’ Association to actively sell the re-birth of the Lower Italian Market. Ensure that marketing occurs in multiple media forms, both in print and online.



Above: Sketch of proposed “Sister Cities” signage at the Crab Shack corner.
 Right: Sketch of proposed alternative - Cypress Trees.



3 Guiding Change, Igniting Change

The recent demolition of the Ice and Coal building has initiated a period of extreme vacancy at a very high profile location, perhaps a defining location for the Lower Italian Market. Though decreasing in number, there are additional spaces along the corridor that remain vacant or underutilized as well, awaiting a strengthened market to push new businesses through their doors. An activated streetwall offering visual interest and contiguous shopping opportunities is important along an urban retail corridor like South 9th Street, but redevelopment of the Ice and Coal site could take years, especially with the struggling housing market nation-wide, and the commercial market for the smaller retail spaces will take time to build too.

The following recommendations are about development in the Lower Italian Market and the interim time between now and when development occurs. They answer two questions that arise regarding the current gaps in the Lower Italian Market:

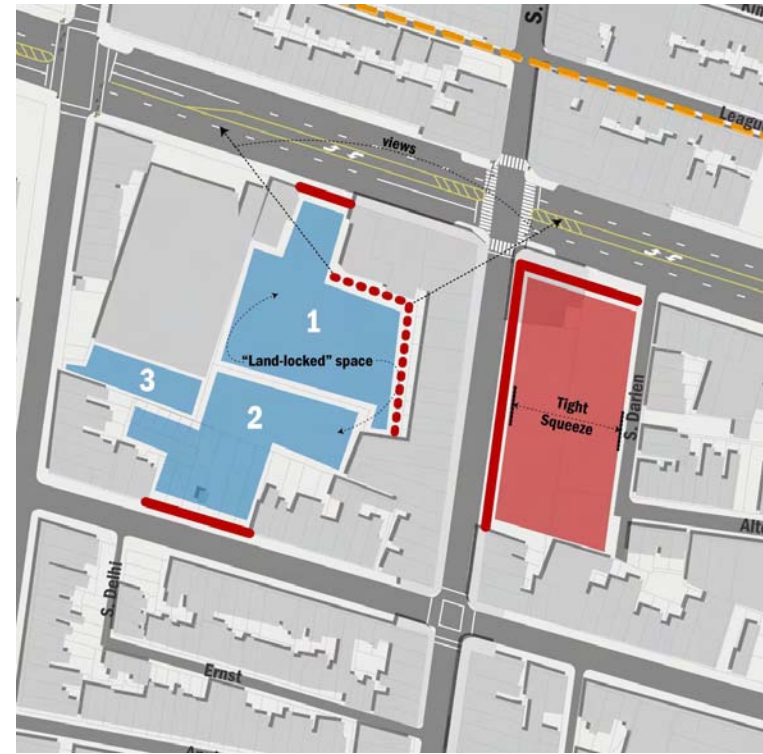
- What should the PSCA expect and advocate for in the redevelopment of key sites along the corridor?
- What might occupy these spaces during the period of vacancy, enlivening the corridor and helping to build a market for what is to come?



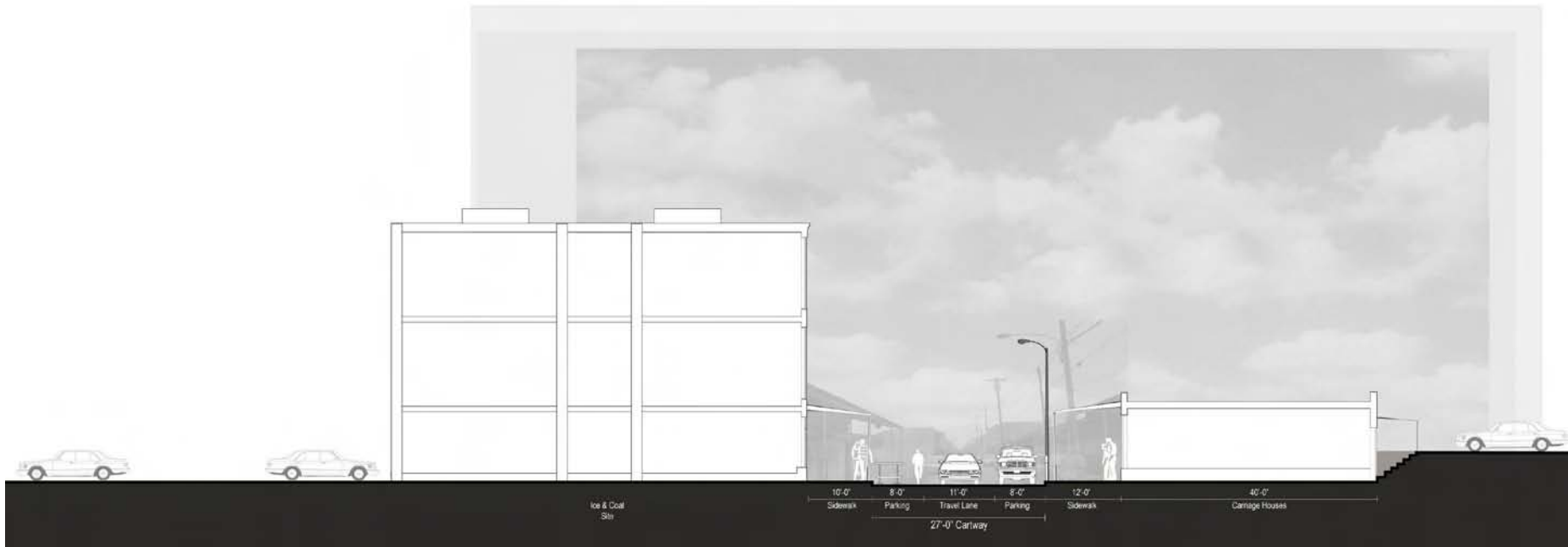
Ice and Coal site, existing.

3.1 Establish Long-Term Guidelines for the Redevelopment of Key Properties.

Two key redevelopment sites exist in the Lower Italian Market, one on either side of South 9th Street, just south of Washington Avenue. On the east side of the street is the site of the former Ice and Coal building, a tight 120-foot (approximately) deep site between 9th and Darien Streets. The redevelopment of the Ice and Coal site will result in new street frontages on both Washington and 9th. On the west side of 9th, exists a large, “land-locked” space tucked behind the existing single-story carriage houses and other existing developments on Washington, 10th, and Ellsworth. This land, carved into three smaller spaces by property lines, meets the street in only two small spaces, one along Washington, and one along Ellsworth. Ultimately, the single-story carriage houses, which while adding character and history to the street offer limited retail amenities, architectural value, and real estate value, present a possible third redevelopment site, extending the “land-locked” space to meet 9th Street.



Analysis of challenges at key development sites.



Existing 9th Street section looking south from Washington (pre-Ice and Coal building demolition).



As the PSCA will serve as the unified voice of the community in negotiating with the developers of these sites, it is important to establish long-term guidelines for their redevelopment. Three options were explored to test the potential of the underutilized sites in the area. These options are not development plans and serve only as a base of information for PSCA as they review subsequent plans by developers.

Development Option 1

- Ice and Coal site** – steer redevelopment such that structural and façade characteristics complement the corridor, including redesigned awnings (Recommendations 4.2 and 4.3) and ground floor commercial space(s). In this development scenario, the new building will reach approximately four stories with parking located at grade and behind the structure, accessed off of Darien Street. Given the constrained site, a shared parking arrangement may need to be negotiated between the building’s commercial tenants and residential occupants. Ensure that the building’s program strengthens the market’s viability, bringing a non-chain, high-quality retail anchor to this large square-foot print opportunity of the corridor. Housing on upper floors should reactivate the corridor and provide customers for the retail below. A green roof should cap the project. This could yield approximately 16,000 square feet of commercial space on the ground floor, 32 residential units and 50 parking spaces.
- Parking lot west of 9th Street** – work with the St. Maron’s Church CDC to build 50 units of new senior housing in a four to five story structure on the publicly owned parking lot west of 9th Street, just off of Ellsworth Street. The development should include minimal parking required for senior housing developments, and a garden and plaza for residents and other seniors in the area. The remainder of the parking lot in the middle of the block, now divided in three by chain link fencing, should be joined and redesigned to provide more parking space for all users.
- Carriage Houses** – consider a range of alternatives, including redevelopment to create a larger retail footprint to house a second retail anchor on this portion of South 9th Street or keep the historically “short” structures and cap them with a publicly accessible green roof that introduces an elevated park “on” the Market. The green roof should be used to improve stormwater management, provide a destination social space, and should be accessible via the parking lot located behind the Carriage Houses.

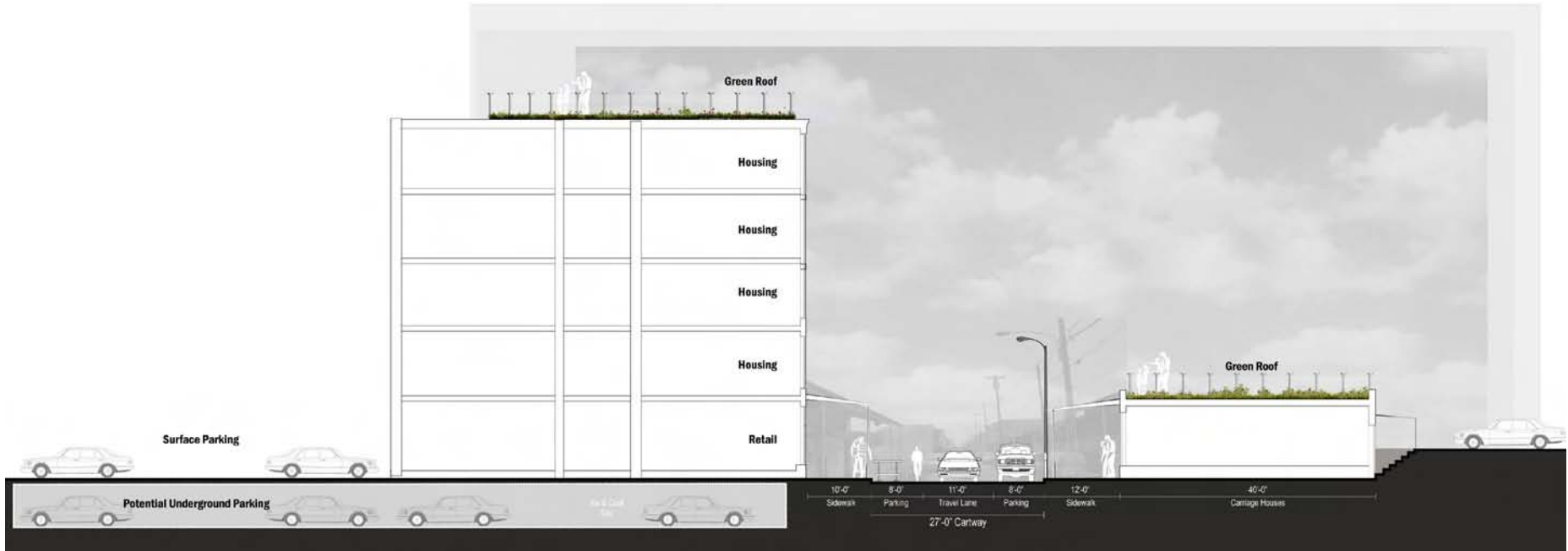


*Right: View of Carriage House roofs pre-Ice and Coal demolition.
Below: Sketch of proposed elevated park on Carriage House roofs.*





Development Option 1 site plan.

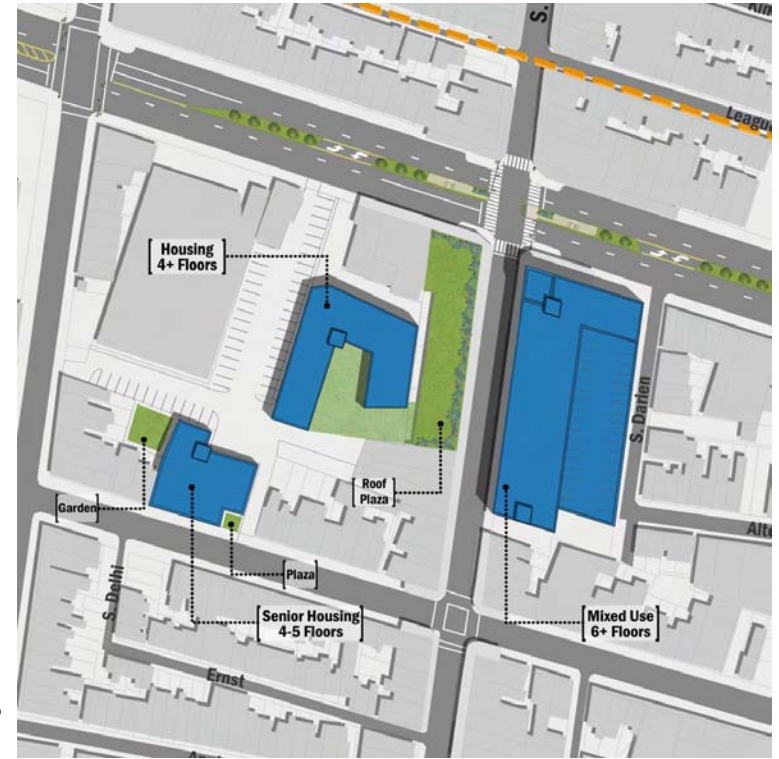


Development Option 1 - Potential 9th Street section looking south from Washington.

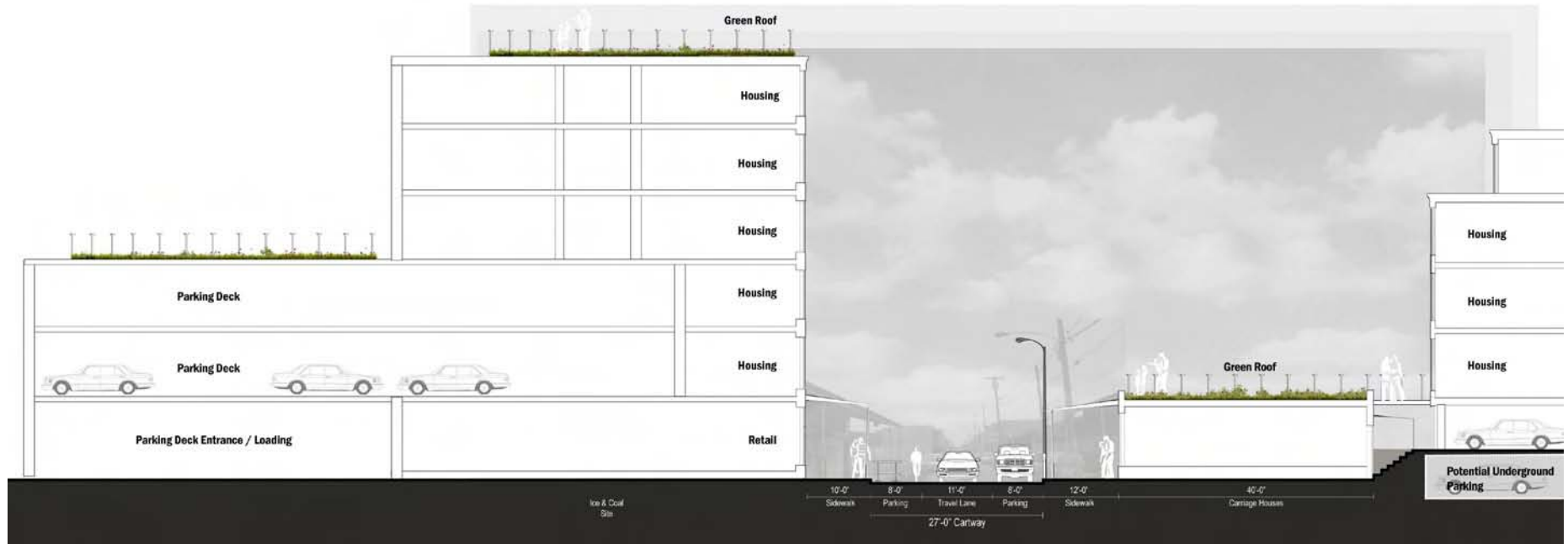


Development Option 2 – this is the densest redevelopment scenario, and parking is likely to be the limiting factor.

- **Ice and Coal site** – maintaining the structural and façade requirements of the first development scenario, allow the new Ice and Coal building to build taller, up to six stories, provided that parking, which must now occur in a stacked garage format is not seen from 9th Street. To maintain commercial or retail frontage on 9th, some parking will need to be tucked under the site below grade, the rest built behind residential units that line the commercial corridor. A green roof should cap the project. This could yield approximately 18,000 square feet of commercial space on the ground floor, 50 residential units and 100 parking spaces.
- **Parking lot west of 9th Street** – build new senior housing as described in the first development scenario plus four stories of new live-work housing at the center of the parking lot itself. With parking provided at grade and the live-work units occurring on upper floors, the buildings elevated courtyard should extend to meet the proposed elevate park over the Carriage Houses. This is the densest redevelopment scenario, and parking is likely to be the limiting factor. Development in the parking lot could yield 32 residential units on 4 floors with 50 parking spaces remaining in the parking lot.
- **Carriage Houses** – adopt the same expectations and approach described in the first development scenario.



Development Option 2 site plan.



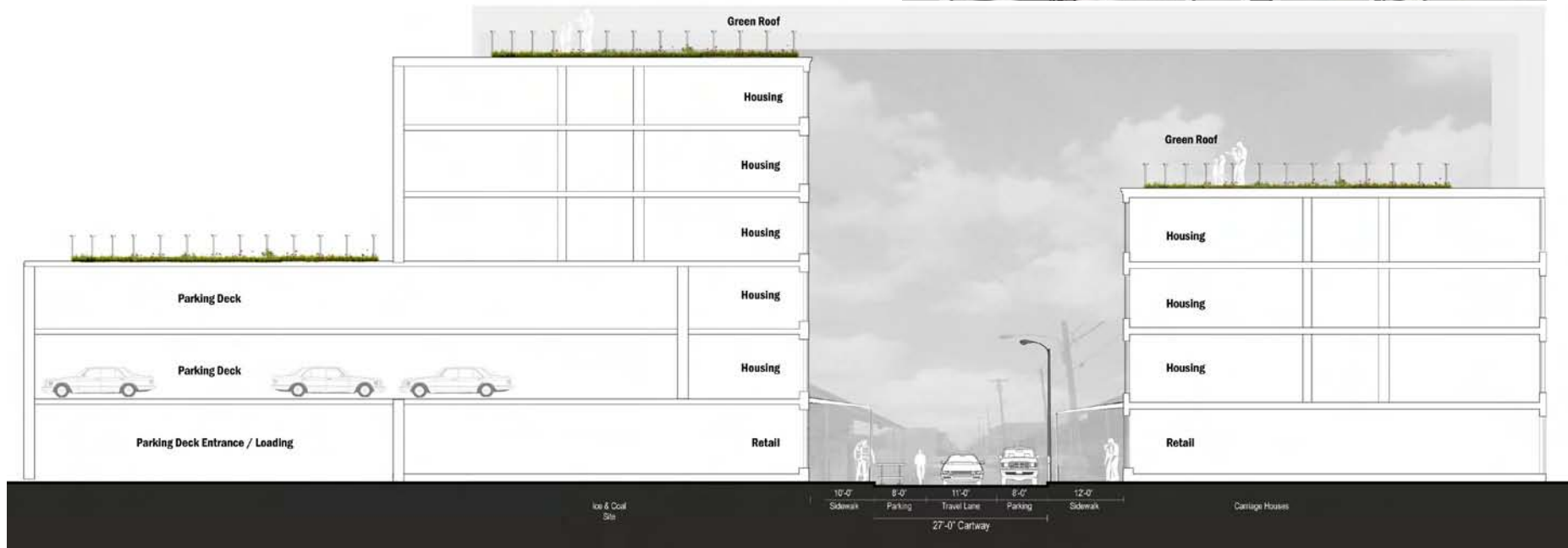
Development Option 2 - Potential 9th Street section looking south from Washington.

Development Option 3 – this is the most balanced, and the most likely, redevelopment scenario, at once maximizing existing real estate potential and infusing new life in the Market with the addition of a second retail anchor coupled with additional housing units.

- **Ice and Coal site** – adopt the same expectations and approach described in the second development scenario.
- **Parking lot west of 9th Street** – adopt the same expectations and approach described in the first development scenario.
- **Carriage Houses** – replace the existing single-story carriage houses with a new mixed use development that includes a large commercial footprint for a second retail anchor on the ground floor and three floors of housing above. This could yield approximately 12,000 square feet of commercial space on the ground floor, 30 residential units above and 90 parking spaces in the rear parking lot.



Development Option 3 site plan.



Development Option 3 - Potential 9th Street section looking south from Washington.



3.2 In the Meantime, Think About the Ice and Coal Site as a Site and a Surface.

Redevelopment is often a lengthy process, full of unforeseen hurdles and delays, and the duration of the construction phase can further deaden the Lower Italian Market's image. The housing market collapse currently playing out across the United States is adding an additional layer of uncertainty to already complex urban redevelopment projects and threatening to further lengthen reinvestment processes. The recent acquisition and demolition of the Ice and Coal site has dramatically altered the face of South 9th Street. A solid but temporary-looking eight-foot plywood wall now stands where a hulking, three to four story brick building once stood, and though developer intentions are to move the Ice and Coal project forward with relative speed, the wall may in fact be an element of the Lower Italian Market's streetscape for longer than anyone anticipates. Rather than sitting back, watching and wondering between now and the new building's completion, the PSCA should work with the site's owner to make the best possible use of the now vacant and cleared space in the interim.



Ice and Coal, before and after demolition.



As a site – cleared and open, the Ice and coal site has limitless potential. According to the developer, however, the fill on the cleared site has not been compacted, and is therefore susceptible to settling and not fit for occupation or events. If the site's ground conditions improve, the PSCA should investigate the possibility of the following site-specific, temporary, cultural uses that would draw people, attention, and energy to the Lower Italian Market:

- **Once per year** – use the site as a destination for the Italian Market Festival, to host a BBQ Cook-Off, and/or to host an Ice Carving Competition where the *Ice* and *Coal* building once stood.
- **Every so often, in the summertime perhaps** – use the site to host “drive-in” movie nights projected on an adjacent wall. Rocky, anyone?
- **Ever weekly or every month** – use the site for an open air market that brings a new and rotating range of goods to the Market
- **“Permanent” Temporary Use** – if the projected pace of redevelopment slows or stops, consider the site's potential for a more permanent temporary use as a tree farm for local greening efforts.



As a surface – if use of the Ice and Coal site remains an impossibility, utilize the blank wooden wall that now meets the sidewalk as a canvas to advertise the area's history and identity, generate buzz about the change underway in the Lower Italian Market, or prompt a public dialog about that change:

- **Treat it like a message board** – with multi-lingual welcomes or an interactive art installation that invites public comment about the future of the Lower Italian Market.
- **Give it a pattern** – to enliven the corridor as in artist Tattfoo Tan's *Concrete Jungle* installation on Jersey Barriers in Lower Manhattan.



Concrete Jungle by artist Tattfoo Tan, New York City. Sources: www.tattfoo.com/projects and www.nytimes.com



surface
treatment



...or make use of the Ice and Coal site's surface: proposed multi-lingual welcomes on the Ice and Coal site's surface.

3.3 Encourage the Creation of Live-Work Spaces in the Upper Floor Units along 9th Street.

The PSCA should reach out to the building owners of vacant or underutilized upper floor units along South 9th Street and encourage the transformation of these units into live-work spaces. Upper floor apartments above retail uses are often difficult to rent or sell to families, so property owners believing that there is a lack of market for such units are, in some cases, using the spaces for storage. However, with the corridor's emerging reputation as a place of arts and culture, creative people seeking unique spaces have been moving into the Lower Italian Market area.

The PSCA can play a key role in supporting 9th's Streets future as a more mixed-use, 24-7 corridor by working with building owners and realtors to directly target students, artists, and other creatives for upper floor space. The PSCA should start by reaching out to local property owners that the organization knows. If this is successful, as a second phase, the PSCA should reach out to the other building owners living elsewhere.



While there is not much existing upper floor vacancy, many of the upper floor units along South 9th Street are underutilized.



Alternative surface treatment for the fence at the Ice and Coal site, an interactive brainstorming wall.

4 Getting There, Getting Around (and enjoying it)

Currently, the pedestrian or cyclist is at odds with the automobile in the Lower Italian Market area, particularly at Washington Avenue, at all intersections adjacent to Capitolo Park, and along Passyunk Avenue. In true South Philly-style, the automobile typically dominates the street, the curb, and the crosswalk or median, despite the fact that it is the area's pedestrian-scale environment that makes this corridor appealing to small shop and open-air market patrons. The Lower Italian Market should more safely accommodate and offer additional amenities for pedestrians and cyclists, incorporating designs that enliven and reward the travel experience for those moving at slower speeds.

In addition to supporting pedestrian and cyclist mobility, the Lower Italian Market must better manage the presence of cars. Like most urban retail centers, parking falls within the top three most controversial and “real” issues in the Lower Italian Market. Even “hipsters” and bohemian types have expressed the belief that there is a lack in parking availability and concern that with new development, the parking demand will become worse. Following the perceived increase in the area's density – resulting from single-family homes being converted to multi-family dwellings – a new influx of cars will be cruising the already over-burdened streets in search of an open space. As new development is proposed for the Ice and Coal property, the issue of parking will erupt once again and will undoubtedly be a major obstacle to realizing a successful development project. Circulation strategies must address all modes of travel to reduce auto-reliance among residents, visitors, employees, and patrons.

The following recommendations detail ideas for improving mobility, circulation, and the experience of moving through the Lower Italian Market:

4.1 Shrink the Expanse of Washington Avenue.

Washington Avenue consists of a 70-foot cartway plus roughly 12 feet of sidewalk on either side, resulting in a nearly 95-foot break in the Italian Market's otherwise compact rhythms and quaint street system. It's an entirely different world the one that exists on 9th Street – it reads like a divide, it causes a divide, and it disrupts what could be a natural flow of pedestrians moving between the Upper portions of the Italian Market and the cheese steak joints at the far end of the Lower Italian Market. Washington Avenue, as it stands, is an ocean of cars, trucks, and buses.

Relying on foot-traffic or park-once-and-walk customers, the vibrancy of the retail in the Lower Italian Market greatly depends on pedestrians and shoppers north of Washington Avenue 1) recognizing that the shopping district in fact continues south of the Avenue, and 2) feeling compelled, or at the very least, not discouraged from crossing Washington Avenue to get there. PSCA together with the businesses on South 9th Street should work with the City of Philadelphia and the Pennsylvania Department of Transportation (PennDOT) to advocate for and implement the following streetscape improvements at the intersection of 9th and Washington:

- **Introduce a green median** – Where Washington Avenue's median is striped with yellow paint or not serving as a turning lane, build up a curb and plant a green median with trees, landscaping, and bicycle parking in the center of Washington between 10th and Passyunk. This will introduce a visual break and a pedestrian refuge in the mid-point of the vast cartway, helping to “shrink” Washington Avenue, at least in appearance. Work with the Philadelphia Water Department's (PWD) Green Streets program as a partner in funding, implementing, and integrating bio-swales and natural stormwater management measures in the median's redesign. Add bicycle parking to reinforce that cyclists are welcome in this pedestrian-oriented market. Add visible signage that cues people to continue their shopping south of 9th Street.
- **Constrict vehicular traffic flow to slow speeds and encourage pedestrian and bicycle activity** – Sidewalk bump-outs already exist at all corners of the intersection, but the east side of the median should be stretched past the crosswalk markings and slightly into the intersection space to line up with the outer edge of the stalls on the east side of 9th Street, reminding cars turning off of Washington to drive up 9th that they are entering a much slower, pedestrian-dominated zone. Consider adding pavers in what would be the stalls' zone were they to continue across Washington Avenue. Restripe the crosswalks with international style crosswalk markings (zebra striping), and while the paint is out, stripe bike lanes in both directions on Washington Avenue. (Bike lanes along Washington are on the Philadelphia Bicycle Map as a proposed improvement.)

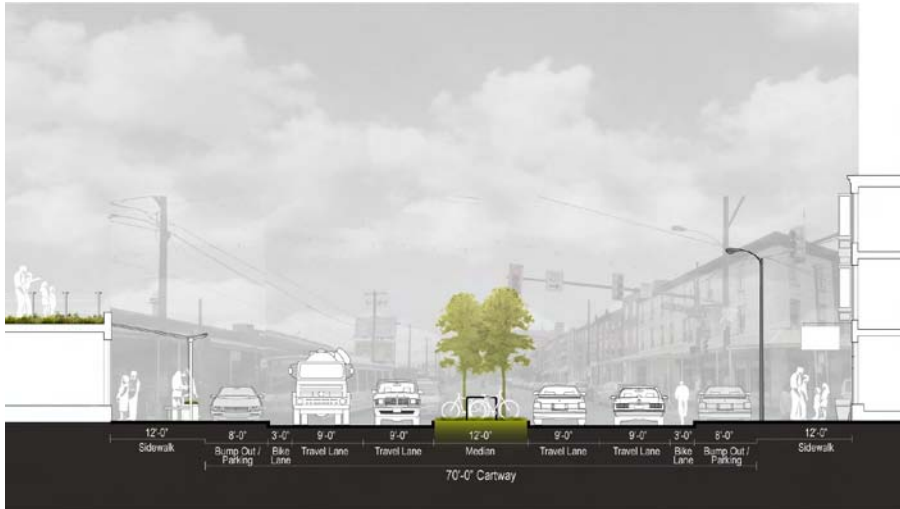
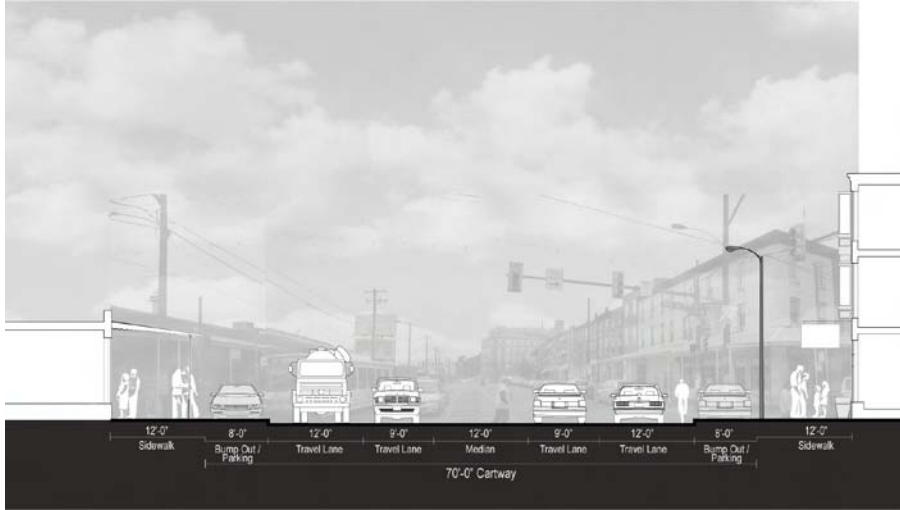


Plan view of Washington Avenue, existing.



Plan view of proposed changes to Washington Avenue.





Above, top: Section of Washington Avenue at 9th Street, existing.
 Above: Section of Washington Avenue at 9th Street showing proposed improvements.



Rendering of proposed improvements to the intersection of Washington Avenue and 9th Street.



4.2

Shed a Little Light on the Scene.

The Italian Market awnings are a recognizable symbol of the market and the result of many years of teamwork between political representatives and local business owners. Though the awnings north of Washington were replaced in the mid-1990s, they remained in the Lower Italian Market and many of the old awnings are still in need of replacement, repair, or reconsideration. Because most of the awnings are opaque, the sidewalks on South 9th Street rarely see light during the day, and at night receive none of the illumination provided by the corridor's auto-oriented cobra-head streetlights. The result: the Market's sidewalks and street life would benefit from more light 24 hours a day.

- **Convert the awnings into skylights** – allowing natural light to reach the sidewalks. As symbols of the Market and a link to the past, it is important to keep the awnings as an element of the streetscape, but reinventing the awnings to bring sunlight to the corridor would be a major improvement, allowing the Lower Italian Market to re-image itself as a related to, yet distinct from the traditional Market. Consider a plastic composite panel as the material for the new awning roofs which is inexpensive and coated so it doesn't yellow under the sun.



Above: Lower Italian Market streetscape, existing.

Right: Rendering of proposed improvements to Lower Italian Market streetscape.



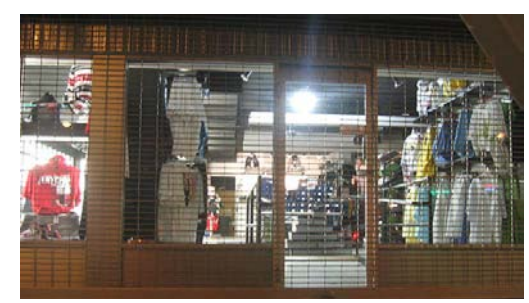
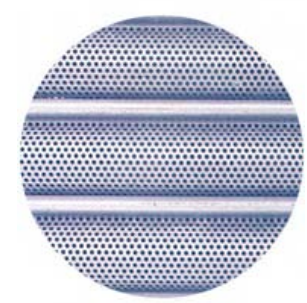
- **Introduce a solar-powered LED lighting scheme** – to add light and visual interest along the corridor at night. Light Emitting Diode (LED) tube lighting is inexpensive and easy to install. While the light that tube lighting offers is minimal and more decorative than functional, lining the awnings, as done to highlight the structures on Boat House Row in Fairmount Park, would help put the Lower Italian Market on the map as part of the larger commercial corridor.
- **Encourage business owners to utilize LED or fluorescent lighting fixtures** – which could tap into the solar panel power source and add bright and focused lighting under the awnings at night. Brighter sidewalks would discourage loitering in these spaces, which are protected from the elements, discourage vandalism and illegal dumping, which continue to plague the Lower Italian Market, and contribute to a general feeling of improved safety along the Market at night.
- **Encourage business owners to install perforated security grates** – that allow light and sight lines into and out of store windows even after hours. The additional light on the sidewalk and visual interest of visible merchandise will help the corridor to feel brighter, more active, and more inhabited, and therefore safer in the evenings and throughout the night.



LED tube lighting.



Outdoor LED light fixture to illuminate the dark sidewalks at night.



Perforated security grates.



4.3

Make the Awnings Work for You.

If reconsidering the awning roofs, reconsider the awning structures as well, especially in the case of redevelopment, where awnings will need to be built, not retrofitted. In their redesign, the awnings should become not only more aesthetically pleasing, but more functional as well.

- **Design the awnings to channel rain water** – through a weep hole, down the frame, and into planters or rain barrels at street level (Recommendation 5.1).
- **Equip the awnings with solar cells** – to fuel the proposed LED tube lighting and LED or fluorescent lighting fixtures (Recommendation 4.2).
- **Incorporate a kit of parts** – in the awning redesign, including an extendable canopy to cover stall space below, stalls, benches, bike racks, planters, and rain barrels so that vendors can tailor their frontages as desired.

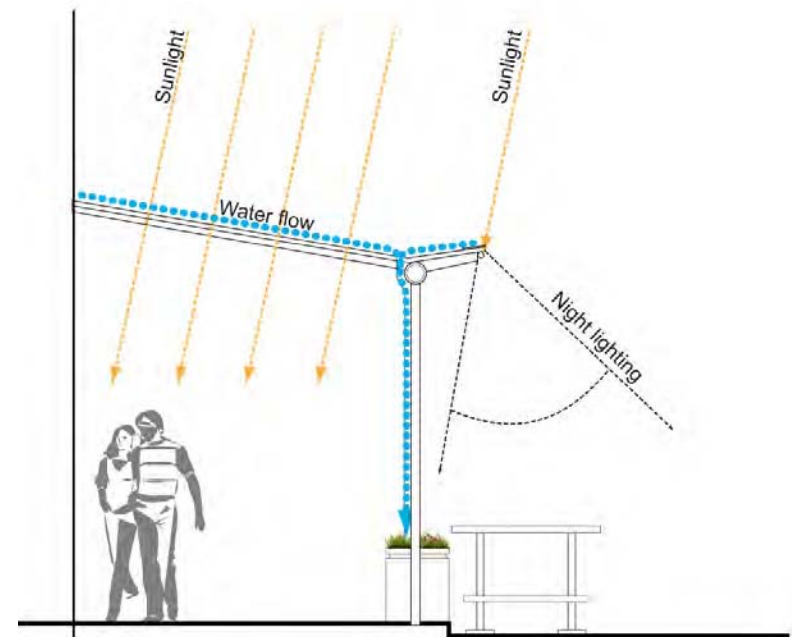
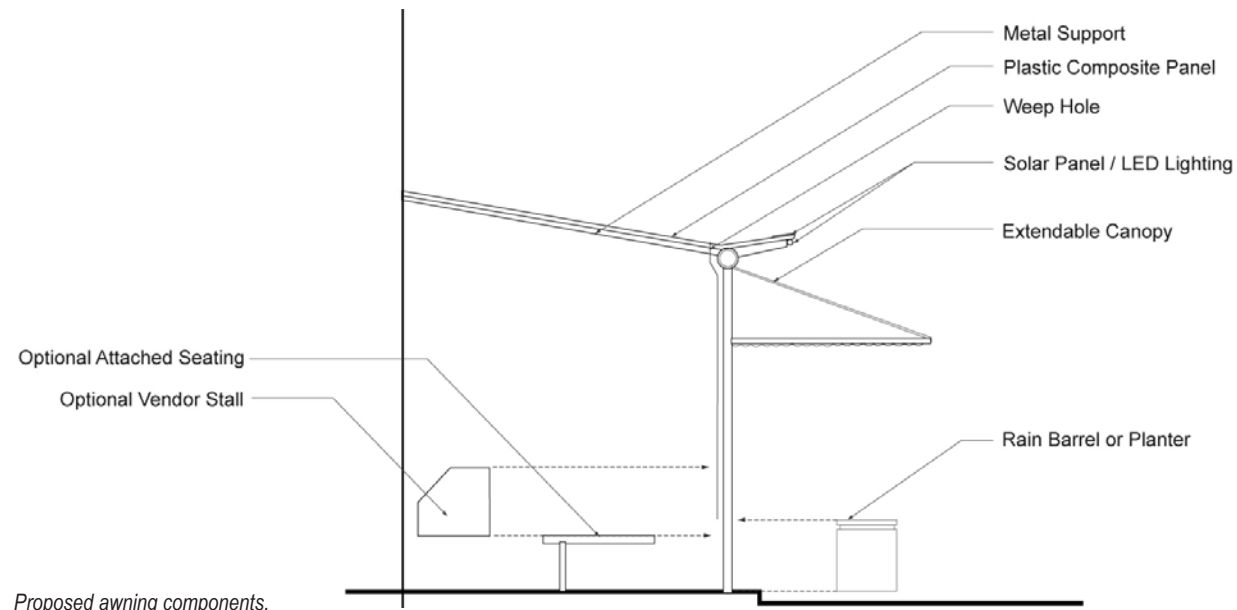
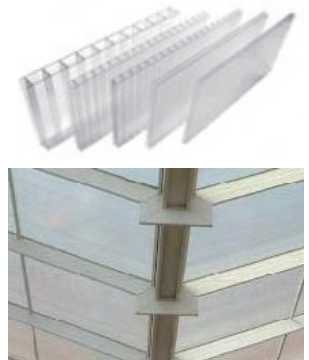


Diagram of proposed concept for awning re-design.



Proposed awning components.

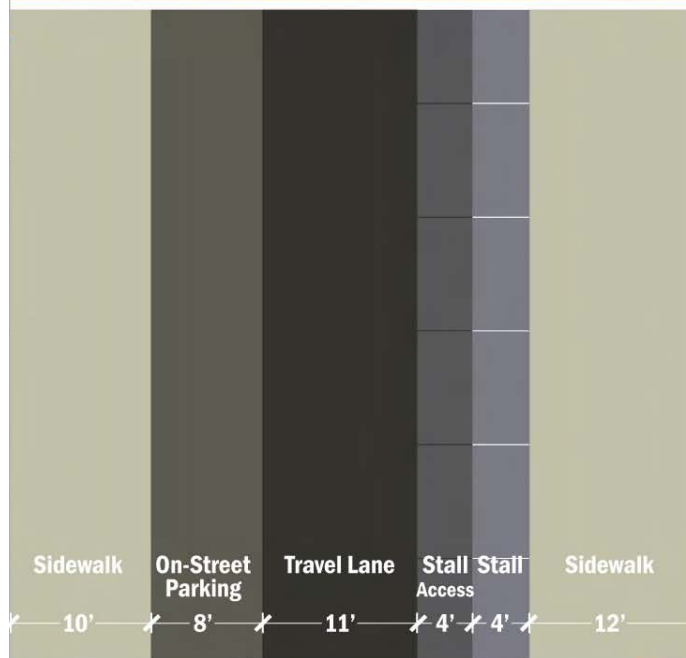


Polygal plastic composite panel.

Diversify the Uses Programmed for the Public Right of Way.

At present, 9th Street’s cart way is roughly 27 feet across, with eight feet of on-street parking on the west side of the street, an 11-foot travel lane, and eight feet of parking and/or vendor stalls (largely unutilized) on the east side of the street. Ten to 12 feet of sidewalk flank the cart way on either side. Because the stalls are mostly or entirely non-operational and the sidewalks are dark and uninhabited compared to the cluttered and active sidewalks in the Upper portions of the Market, the Lower Italian Market’s public right-of-way feels strangely closed and vacant. The PSCA should work with corridor business owners and the City to diversify and enliven the Lower Italian Market’s street and sidewalk space.

- **Push for the transfer of unused stalls to new operators** – if the stalls are to stay, then the stalls should be active. The PSCA should work with the City to determine a process for transferring unused stalls to new operators and keep its ears to the ground in hopes of hearing about interested operators. Alternatively, work with existing store owners on the east side of the street, encouraging them to take ownership of the extra space in the right-of-way to expand their outdoor programming.
- **Don’t force the stalls if the stalls aren’t happening** – If no potential stall operators emerge, let the stalls go as a piece of the Market’s history and reclaim and reactivate that space with new outdoor programming (see below).
- **Encourage people to inhabit the corridor by expanding (and furnishing) “living space” along 9th** – Work with store owners to populate their sidewalks with benches, tables, planters, and shelving, creating social spaces, or outdoor living rooms, where customers can sit and enjoy the Market and its edible goods. Where stalls no longer stand, encourage shop owners on the east side of the street to take ownership of the extra space in the right-of-way, furnishing larger “living” and “dining rooms” to draw more customers to the corridor and encourage those who do come to stay longer. Perhaps once per block, reclaim an on-street parking space for bicycle parking (Recommendation 4.6).



Outdoor living room at transit stop in LA. Source: www.nytimes.com

9th Street Right-of-Way program - proposed, top; and existing, left.



4.5

Take Back the Sidewalks.

The nature of uses along portions of Passyunk Avenue, Washington Avenue and even 9th Street is in conflict with the aspirations and potential of the Lower Italian Market. At various points along Passyunk Avenue, for instance, safe pedestrian passage is compromised by auto-oriented uses that typically take advantage of limited local enforcement. Drivers park cars wherever they please, and wide curb cuts reduce the sidewalks' ability to afford safe passage and an active street life.

This is South Philly, we know, but if the PSCA doesn't say something, who will? The PSCA should pursue three strategies for keeping cars on the streets, in parking that actually turns over, so that the sidewalks become less obstructed for pedestrian travel:

- **Print activist postcards and place them on windshields** – to remind people of the rules of the road. Quite simply, *stay on the road*.
- **Pressure the City to enforce existing laws** – and establish a relationship with the Philadelphia Parking Authority (PPA) who can dispatch a patrol person to ticket cars parked on the sidewalks when necessary.
- **Lobby for more metered parking spaces on 9th Street** – to encourage parking turnover, bringing a new crop of customers with each cycle, and to discourage employee parking along the corridor.

While out postcarding window shields, scout out the large blank walls of the auto-oriented uses along Passyunk Avenue. These walls are good candidates for murals that would enliven the streetscape and help to strengthen the visual link between the Lower Italian Market and Passyunk Avenue. A mural project on Passyunk would also strengthen the collaborative relationship between the PSCA and the East Passyunk Avenue Business Improvement District.



Proposed activist postcard concept.

4.7

Make Room for Bikes

With the growing hipster presence along East Passyunk Avenue and Mexican community along 9th Street come more cyclists and bicycles in the Lower Italian Market, a trend that will likely continue with gas prices on the rise. Parking is precious in the Italian Market, but bikes need parking too. Prevent a new form of South Philly sidewalk clog (due to bicycles and therefore much less offensive) by designating a space or two for bicycle parking in the place of an on-street parking space (gasp!). If the residential and business communities object to replacing an on-street parking space with bike parking, search for a hydrant with ample room on either side that could host some bicycle parking as a pilot project.



Replace an on-street parking space with bicycle parking...



... or make space near a hydrant.



5 Growing Green

Despite community efforts to improve the neighborhood's urban forest, much of the study area remains sparsely planted. Many streets within the study area are quite narrow, and a locally harbored belief that street trees damage properties is shared by many neighbors. Some residents have gone to seemingly great lengths to add natural elements to the front of their properties with potted plants and window boxes, but most have little or no plantings to soften the environment, add beauty, and help manage stormwater when it rains. The PSCA has stepped in to help by planting trees throughout the area. Design solutions should incorporate a greening strategy that accounts for these factors, introducing natural elements in areas by methods that preserve and enhance the integrity of adjacent properties. With Capitolo Playground serving as the main green oasis in the otherwise dense and hardscaped environment, much could be done to bring the park to the pedestrian and the pedestrian to the park.

The following recommendations detail ideas for greening the Lower Italian Market area:

5.1 Adopt an Area-Wide Greening Strategy.

Given South Philadelphia's dense urban fabric and notoriously narrow streets and sidewalks, gardeners must be thoughtful and garden strategies well tailored if greening efforts are to succeed. The greening strategy for the Lower Italian Market and its surrounding residential streets should include the following components:

- **Plant trees** – on the north side of major East-West Streets so saplings will receive the maximum amount of sunlight.
- **Encourage potted trees, planters, or window boxes** – on the south side of major East-West Streets, choosing plant species that thrive in shade and partial shade. Potted trees and planters are also appropriate for 9th Street itself, to sit at the base of the proposed awning structures where they will function to absorb rainwater funneled down from the awnings (see Recommendation 4.3).
- **Encourage rooftop gardens** – as a desirable design element for new mixed use development to help manage stormwater.
- **Introduce new and unique green elements to the local landscape** – including new Cypress trees at the corner of 8th and Passyunk (Recommendation 2.6); an elevated park “on” the market in the form of a usable green roof above the carriage houses that provides open space and stormwater management directly on 9th Street (Recommendation 3.1); new green space specifically for seniors in conjunction with new senior housing (Recommendation 3.1); new bike lanes and a greened median with bicycle parking on Washington Avenue (Recommendation 4.1); and, of course, an improved Capitolo Playground, park edge, and park access (Recommendation 5.2).



Proposed area-wide greening strategy.



5.2

Open Up the Park.

Capitolo Playground is an expansive park space within an otherwise tight and hardscaped urban environment. It contains a well-groomed baseball field, a make-shift soccer pitch, basketball courts, a playground, and a recreation facility. Access to the park is highly limited to just a handful of gates that break the endless façade of metal fencing that surrounds the entirety of the park. The children's playground at the northeast corner is perhaps the most restricted space. A four-foot tall concrete wall protrudes from the sidewalk raising the playground from the street, and the park is framed by a 10-foot tall fence that further limits the pedestrian's relationship with the active space. Capitolo Park provides an enormous opportunity for quality neighborhood green space, and an amenity for shoppers along the retail corridor and the growing population of families with young children the neighborhood, but only if the park becomes more accessible and user-friendly to neighbors, visitors and passersby.

The park's redesign will need to be coordinated with the Philadelphia Department of Recreation and should accomplish the following:

- **Strengthen the pedestrian-park relationship** – by opening new entrances to the park at key 10th and Federal and across from Pat's King of Steaks on Passyunk between 9th and Wharton. The entrance to the playground in the park's northeast corner should also be shifted slightly east to better align with the playground's tree-lined path.
- **Soften the edges of the park** – by moving the tall chain-link fencing that surrounds the park inward except for at the baseball diamond in the southwest corner, the playground, and the basketball courts. Intensify the plantings between the new fence and the sidewalk with trees and shrubs as done at Columbus Park. Paint the four-foot concrete wall that elevates the playground above street level to add visual interest to the park's northeast corner.



Existing park edge at Capitolo Playground.



Rendering of proposed improvements to Capitolo's edge.



- **Redesign the recreation space** – to include a real soccer field along the park's northern edge. At present, a strange chain link fence bisects the park, making what was once a baseball diamond in the northeast corner unusable. The informal soccer field that has emerged in its place is well used, particularly by Latino men in the neighborhood.
- **Install secure public restroom facilities** – adjacent to the basketball courts and across the street from Pat's and Geno's to meet the needs of the area's evening clientele. Bathroom requests are a nuisance in the neighborhood, and the new entrance to the park on Passyunk would provide access to a secured space for the restrooms, ensuring the remainder of the park's protection after hours.
- **Offer additional programming** – like gardening seminars to engage the area's youth and elderly populations, in particular.

Site plan of proposed improvements to Capitolo Playground.



6 Sparkling Clean (and kept that way)

Despite recent improvements to curb-side garbage pickup and improved City management, trash continues to saturate conversations with local residents and business owners. From insufficient garbage pickup, to litter along the curbs, antiquated and unhealthy means of waste disposal (read fires burning in trash cans), and some lack of diligence by corridor businesses, trash plagues 9th Street and is an issue that crosses boundaries affecting the pedestrian environment, local image, marketing, and the potential recruitment of new businesses. Furthermore, interview anecdotes suggest that trash disposal and sidewalk maintenance are a main cause of racial tension between old timers and newer immigrant-oriented businesses, with the former believing that that latter are not doing their part to keep the corridor clean.

The following recommendations detail ideas for cleaning, but not sterilizing, the Lower Italian Market area:



Big Belly.
Source: www.bigbellsolar.com

6.1

Let's All Pitch In.

Part of the Italian Market's charm lies in its grittiness. In a compact and active urban marketplace, the necessary functions are necessarily exposed – delivery and pickup, packaging and unpacking, display, consumption, and disposal all occur within the same 20 feet of sidewalk and street space. While the bulk of these activities occur at the store or distributor scale, individual consumers engage in them as well, particularly in a food-based market, where purchasing, eating, and disposing of waste often happens while strolling along the corridor. Making waste disposal easier for consumers will enable the Italian Market to maintain its grit without slipping too far in the direction of gross.

- **More trash bins** – The PSCA should work with the corridor's business owners and the City to provide trash receptacles at regular and frequent intervals along South 9th Street. More trash cans will translate into fewer windswept cheese steak wrappers and other forms of packaging strewn on area streets, thus improving the area's littered and unkempt appearance and, in turn, both its image and the public's perception.

The PSCA should select bins that offer functionality and add aesthetic interest or originality to the corridor. One option is the "BigBelly," a solar-powered, self-compacting trash bin that has already proven successful in high pedestrian traffic volume areas in Boston and New York City. Although substantially more expensive than a more traditional trash can, the BigBelly reduces the frequency of trash collection by 70 percent, which offsets the cost in two years. After the initial two years, the cans will save the corridor and the City significant dollars in labor and maintenance. Advertising space on the sides of the bins can be used to offset purchase costs. Given the nature of the Market's goods (food, some of it for immediate consumption) and the customer base (high volume, both local and tourist), the Italian Market would be an ideal candidate for a Philadelphia-BigBelly pilot project.

- **More community clean-ups** – The PSCA already does a great job of organizing community clean-ups of the neighborhood, and should continue to organize these efforts along 9th Street as well. Not only will clean-up days improve the PSCA's visibility, but they have the potential to mobilize a somewhat fragmented community around an issue of common concern while reminding business owners that the market still does and should serve the local neighbors, not just with goods, but with common courtesies and cleanliness.

6.2 Help Businesses to Do More.

Cleaner streets are a quality of life matter for South 9th Street's residential neighbors, but a matter of survival for local businesses. The image of their stores and appeal their goods is directly related to the surrounding sidewalk environment. It follows that the PSCA and the residential community should expect and encourage the business community to do their fair share toward keeping 9th Street's sidewalks clean and navigable. The PSCA should coordinate with businesses in the Lower Italian Market on the following initiatives:

- **Street sweeping** – Some business owners do it, religiously. Others do not. Street-sweeping is a necessity and must be a consistent and regular occurrence. The PSCA should work with all local business owners to organize a street-sweeping and sidewalk cleaning service, to be funded in large part by area businesses. The corridor's overall appearance will improve, tensions between sweepers and non-sweepers will dissipate, and business owners and employees will have more time to devote to other needs such as merchandising and marketing.
- **Alternatives to burning trash** – **“Fire in buckets provides an ambiance, but it's not progressive and not necessary.”** Justly concerned about the air pollution and toxins emitted by the Market's tradition and common practice of burning trash along the corridor, the PSCA should reach out to business owners with an educational campaign about alternatives methods of disposal.



Regular trash pickups offer one answer, requiring the City's partnership. The reduce, reuse, recycle, approach requires the businesses to alter their behavior to a degree, giving more thought to the reuse-recycle potential of each item discarded; for cardboard boxes and bins, this is likely the correct approach (see below). Composting, however, would introduce a new behavior, and potentially a new product, to the Market if produce distributors, in particular, would learn to harvest nutrient rich-compost from their food wastes for resale to local green-thumb and gardening efforts.



- **Business recycling plans** – Philadelphia's residential recycling programs are expanding and improving, now offering weekly curb-side comingled recycling in portions of the City. To help South 9th Street become a greener commercial corridor, the PSCA should work with business owners to develop a commercial recycling plan that ensures that each business is effectively minimizing its waste output.

6.3 Consider a Business Improvement District to Coordinate Improvements.

One way of funding business-driven corridor improvements including trash collection is by establishing a Business Improvement District (BID) in conjunction with the 9th Street Merchants' Association. A BID is a form of taxing district, levying a tax on all business or property owners that is then spent each year along the corridor on items and efforts that benefit all members of the district. The potential of a BID for 9th Street has been considered by the Merchants' Association previously, and if the idea is rejected once more, the PSCA should reach out to the East Passyunk Avenue BID to explore an arrangement that might extend its boundary north along 9th Street to Washington Avenue.

VII Implementation Approach

The Lower Italian Market Revitalization Project plan outlines the direction for 9th Street and the surrounding community over the next decade, and although the plan contains multiple strategies for PSCA and its partners to pursue, each recommendation requires a different set of partners, enabling many proposals to be addressed concurrently. In addition, many of the recommendations are tailored to low-cost solutions that can be implemented by volunteer efforts and through the capacity of local organizations.

Attached is an Implementation Matrix that details the timeframe, responsibility and partners, and potential funding sources for each recommendation to help guide and keep track of the neighborhood's progress in implementing the plan's components. The spreadsheet should be actively used, updated, and changed once implementation commences.



On your marks, get set, GO!

What do we do tomorrow?

PSCA's first action item is to submit the plan for approval by the Philadelphia City Planning Commission and Department of Commerce. A copy of the plan should also be delivered to Councilman DiCicco, Andy Altman – the Deputy Mayor for Planning and Commerce, and Rina Cutler – the Deputy Mayor for Transportation. The intent is to get the plan recognized by the City and to raise awareness that significant strides have been made to organize and improve the community. This should occur as soon as the PSCA Board adopts the plan.

The immediate next step is to organize a guiding Implementation Committee comprised of PSCA Board members, its general membership and other key stakeholders. The Implementation Committee should divide the task of implementing the plan's six key recommendation areas into six sub-committees charged with raising funds, organizing volunteers, and lobbying the City and other agencies for improvements. At the second public meeting held to discuss this plan's recommendations, many expressed a strong interest in helping to spur implementation and further investment in the area.

The range of recommendations for the Lower Italian Market's revitalization will require coordination and financing well beyond what PSCA can organize locally. City and State agencies, local institutions, and interested developers must form an active dialog about these recommendations. As with any implementation strategy, PSCA should seek to blend dollars from both public and private sources to maximize impact. Foundation dollars and grants should also be sought for specific efforts. This means that the plan should also be hand-delivered to local partners like the East Passyunk Avenue BID and the Italian Market Merchants' Association as well as the Wachovia Regional Foundation and William Penn Foundation.

Phasing and Priority Projects

Discussions with the PSCA Planning Committee, local residents, and business owners emphasized a number of clear priority projects. These priority projects are defined as critical investments that can have a transformative impact on 9th Street over the next 1-2 years. While some of these projects will not be fully implemented within that time frame, it is important that significant progress be made toward their implementation.

Priority projects for the Lower Italian Market include:

- Get to know the new neighbors and make them a part of the PSCA (1.1 – Welcome the Neighbors);
- Distribute information on trash pick-up, local stores, and the area’s unique history (1.2 – Create an Information Brochure);
- Begin interviewing (and recording) local stories for an on-line oral histories project (1.3 – Develop Web-Based Artworks Dedicated to the Exploration of Contemporary Immigrant Experiences (at least get started on moving the process forward));
- Reach out to the Crab Shack to create a new sign to advertise the area (2.6 – Advertise in Visible Locations to Put the Lower Italian Market on the Map);
- Create a stronger link with the East Passyunk Avenue BID (2.7 – Pursue Marketing Opportunities with the East Passyunk Avenue BID);
- Create temporary uses for the Ice and Coal site until it is developed (3.2 – Explore the Ice and Coal Building as a Site and a Surface);
- Get started on changing the look and feel of the Washington and 9th intersection (4.1 – Shrink the Expanse of Washington Avenue);
- Work with the developer of the Ice and Coal site to create new awnings in-line with the objectives described in this plan (4.2 – Shed a Little Light on the Scene);
- Find at least one area on-street for bike parking (4.7 – Make Room for Bikes);
- Continue the tree planting and forge strong links with PHS (5.1 – Adopt an Area-Wide Greening Strategy);
- Organize 9th Street clean-ups (6.1 – Let’s All Pitch In); and
- Test the waters in creating a BID or hiring a street sweeping service (6.3 – Consider a Business Improvement District to Coordinate Improvements).

PSCA’s Capacity to Implement

The Lower Italian Market is well positioned for major change in coming years. An improving housing market and the coming development of the Ice and Coal site will introduce new residents and businesses to the strong existing community. PSCA is already playing a central role in guiding change in the community from planting trees and overseeing zoning to securing the funds to undertake this work. PSCA has proven that it is an extremely capable and knowledgeable organization with the potential to undertake a strong leadership role in guiding many of these recommendations toward reality. But with new ideas comes the need for more people to be actively involved. The only way an organization comprised entirely of volunteers can truly take on this plan is to enlarge its membership, maintain excitement and form strategic partnerships with other organizations. PSCA might look to secure an unpaid intern as staff for a summer or part-time over a year through one of the local universities to help maintain some of this momentum. Many non-profits and CDCs have reached out to both Penn and Temple to gain the assistance of students.

PSCA will also need to fund raise to help finance the implementation of the plan, build internal capacity, and grow its financial and technical resources. In addition to presenting the plan to the City, PSCA should spend a day at the Philadelphia Free Library’s Regional Foundation Center. The Regional Foundation Center at the main branch of the Free Library provides local nonprofit organizations with free access to information on management, grant-seeking, fund development, and proposal writing. They have a comprehensive collection of print and electronic materials available on all aspects of fundraising, institutional advancement, and general philanthropy.

Lastly, PSCA must continue to provide an open dialog in the community. Resident and business owner support and participation are key to the success and implementation of the plan. PSCA must continue to work to inspire all stakeholders to get involved and stay involved. The ball is rolling, the challenge now is to maintain the energy and momentum. *Good luck... and have fun!*

Implementation Matrix

▶ Priority Projects Indicated by: ▶

What PSCA should do tomorrow				
	Action	Timeframe	Responsibility / Partners	Potential Source of Funds
▶	Present the Plan to the City Planning Commission, Deputy Mayor for Planning and Commerce, Deputy Mayor for Transportation and Councilman DiCicco	2008	PSCA	--
▶	Organize an Implementation Committee of the PSCA	2008	PSCA	--
▶	Deliver the plan to local partner organizations and foundations	2008	PSCA	--

1. Building Community				
	Recommendation	Timeframe	Responsibility / Partners	Potential Source of Funds
▶	1.1 - Welcome the Neighbors			
	<i>Key Initial Action Steps</i>			
	Designate 5-10 welcoming committee representatives	2008	PSCA	--
	Form partnerships with local realtors to work with committee	2009	Welcoming Committee	--
▶	1.2 - Create an Informational Brochure			
	<i>Key Initial Action Steps</i>			
	Develop content for a Welcome to South 9th Street Brochure - Assign 3 volunteers to develop draft	2009	Welcoming Committee	--
	Undertake fundraising campaign from local businesses and institutions	2009-2010	Welcoming Committee	--
	Hire local graphic designer to develop brochure and distribute	2010	Welcoming Committee	Private donations, in-kind services, Foundation
▶	1.3 - Develop Web-Based Artworks edicated to the Exploration of Contemporary Experiences			
	<i>Key Initial Action Steps</i>			
	Reach out to Juntos, the Italian Market Merchants Association Asian Americans United to discuss the project	2008	PSCA	--
	Create a list of 20 names that would be ideal candidates for interviews	2009	PSCA / Juntos / AAU / Italian Market Merchants Association	--
	Secure grant money to support the project	2009	PSCA / Juntos / AAU / Italian Market Merchants Association	--
	Purchase recording equipment and enlist volunteers in the effort	2010	PSCA / Juntos / AAU / Italian Market Merchants Association	Foundation grant
	Consider hiring an ethnographer to direct initial process and gather all recordings into one database	2010	PSCA / Juntos / AAU / Italian Market Merchants Association	Foundation grant
	Place recordings on the PSCA website and update annually	2010	PSCA / Juntos / AAU / Italian Market Merchants Association	donation of time for web update
	1.4 - Curate an Exhibit on local immigration to describe the area's rich cultural history			
	<i>Key Initial Action Steps</i>			
	Reach out to Juntos, the Italian Market Merchants Association Asian Americans United to discuss the project	2009	PSCA	--
	Secure grant money to support the project	2010	PSCA / Juntos / AAU / Italian Market Merchants Association	--
	Identify vacant storefront space and work with the owner to secure permission for use	2010	PSCA / Juntos / AAU / Italian Market Merchants Association	Foundation grant to support cost of using the space
	Develop content for the exhibit	2010-2011	PSCA / Juntos / AAU / Italian Market Merchants Association	Foundation grant for research, materials, installation and marketing

2. Developing Identity (and flaunting it)			
Recommendation	Timeframe	Responsibility / Partners	Potential Source of Funds
2.1 - It's About Food			
<i>Key Initial Action Steps</i>			
Encourage new development to include retail related to specialty food	as development occurs	PSCA Zoning Committee	--
2.2 - It's About Local and Global			
<i>Key Initial Action Steps</i>			
Reach out to existing stores in the Italian Market to see if they would be interested in expanding as a part of new development	2008	PSCA / Italian Market Merchants Association	--
Work with local retailers to start a "Buy-Local" campaign and advertise the corridor as a locally operated market-place	2009	PSCA / Italian Market Merchants Association	--
Consider re-branding the "Lower Italian Market" to "9th Street" to recognize the continuing diversity of the market	2010	PSCA	--
2.3 - It's About an Emerging Reputation as an Underground Center for Culture, Arts and Off-Beat Creativity.			
<i>Key Initial Action Steps</i>			
Encourage arts venues and galleries to occupy existing storefronts - encourage new development to consider arts space	as development occurs	PSCA Zoning Committee	--
Invite the Bboy BBQ and other off-beat festivals to make the lower Italian Market their home	2008	PSCA	--
2.4 - Embrace the Cultural Diversity of 9th Street			
<i>Key Initial Action Steps</i>			
Hire a graphic designer to create a new logo and signs that touch on the corridor's history and diversity	2008	PSCA / local businesses	Commerce Dept. /
2.5 - Host a Taste of the Lower "Italian" Market Event			
<i>Key Initial Action Steps</i>			
Reach out to the Italian Market Festival, Juntos and local business owners to discuss the event	2008	PSCA / Italian Market Festival / Juntos / local businesses	--
Create a new 9th Street Market cookbook that advertises global cuisine and where to buy specialty foods on the market	2008	PSCA / Italian Market Merchants Association / local businesses	--
▶ 2.6 - Advertise in Visible Locations to put the Lower Italian Market on the Map			
<i>Key Initial Action Steps</i>			
Reach out to the Crab Shack to explore the possibilities of adding a new sign or Cypress trees	2008	PSCA	--
Commission a local artist to design a "sister cities" sign for the crab shack	2008	PSCA	--
Work with the City and State to create a large sign on the Median of Washington Avenue	2008	PSCA / Councilman's office	--
▶ 2.7 - Pursue Marketing Opportunities with the East Passyunk Avenue BID			
<i>Key Initial Action Steps</i>			
Begin discussions with the BID's staff and Board about joint marketing opportunities.	2008	PSCA / East Passyunk Avenue BID	--

3. Guiding Change, Igniting Change				
	Recommendation	Timeframe	Responsibility / Partners	Potential Source of Funds
	3.1 - Establish Long-Term Guidelines for the Redevelopment of Key Properties			
	<i>Key Initial Action Steps</i>			
	Work with developers on density, parking and use issues	as development	PSCA Zoning Committee	--
▶	3.2 - Explore the Ice and Coal Building as a Site and Surface			
	<i>Key Initial Action Steps</i>			
	Reach out to the owner of the Ice and Coal site to determine feasibility of using the site (or part of it) for temporary uses	2008	PSCA / Ice and Coal owner / Councilman's office	--
	If the Ice and Coal site is not suitable, explore space at Capitolo or on the parking lot west of 9th for outdoor movies, open air market, BBQ cook-offs and winter ice sculpting event	2009	PSCA / Councilman's office	Foundation grant
	Reach out to the Mural Arts Program to discuss options for the surface of the site	2008	PSCA / Mural Arts Program	City of Phila.
	Raise funds to secure paint	2008	PSCA / Mural Arts Program	City of Phila. / In kind donations
	Organize volunteers and kids to paint the wood fencing	2008	PSCA / Mural Arts Program	--
▶	3.3 - Encourage the Creation of Live-Work Spaces in the Upper Floor Units along 9th Street			
	<i>Key Initial Action Steps</i>			
	Reach out to local property owners to develop a joint marketing approach for upper floor units	2008	PSCA	--

4. Getting There, Getting Around (and enjoying it)			
Recommendation	Timeframe	Responsibility / Partners	Potential Source of Funds
4.1 Shrink the Expanse of Washington Avenue			
<i>Key Initial Action Steps</i>			
▶ Hire an engineering firm to test the traffic flow issues and create construction documents		PSCA	DVRPC TCDI Grant / Commerce Dept. Grant
Garner City political support to implement changes		PSCA / Councilman's Office	--
Set a meeting with Rina Cutler to discuss funding options and regulatory hurdles		PSCA / Councilman's Office	--
Lobby the State to allow changes		PSCA / Councilman's Office	--
Secure implementation dollars		PSCA / Councilman's Office	DVRPC TE Funds / City of Phila. / PennDOT
4.2 - Shed a Little Light on the Scene			
<i>Key Initial Action Steps</i>			
▶ Work with the developer of the Ice and Coal site to further develop the new awnings	2008-2009	PSCA Zoning Committee	--
Encourage existing businesses to install outdoor LED lighting under the awnings	2009	PSCA / PCDC	PCDC
Work with businesses to upgrade their security grates	2009	PSCA / PCDC	PCDC
4.3 Make the Awnings Work for You			
<i>Key Initial Action Steps</i>			
Work with the developer of the Ice and Coal site to further develop the new awnings	2008-2009	PSCA Zoning Committee	--
4.4 - Diversify the Uses Programmed for the Public Right-of-Way			
<i>Key Initial Action Steps</i>			
Research the existing stall ownership	2009	PSCA / Councilman's office	
Encourage the transfer (and marketing) of stall ownership to those that would like to operate a street business	2010	PSCA / Councilman's Office	
Select 1-2 businesses as a pilot location for stall alternatives - planters, seating and tables	2011	PSCA / Councilman's Office	
4.5 - Take Back the Sidewalks			
<i>Key Initial Action Steps</i>			
Create and print postcards to place on cars that are not following the rules of the road (or parking)	2010	PSCA	in-kind donations
Pressure the City to enforce existing laws about parking on sidewalks	2009	PSCA / Councilman's Office / PPA	--
Lobby for more metered parking spaces on 9th Street	2010	PSCA / Councilman's Office / PPA	City of Phila. / PPA
Pursue a Mural Arts project along a blank façade on East Passyunk Avenue	2010	PSCA / East Passyunk Avenue BID / Mural Arts	Commerce Department / Mural Arts
▶ 4.6 - Make Room for Bikes			
<i>Key Initial Action Steps</i>			
Select 1-2 locations on-street ideal for new bike parking	2009	PSCA	--
Reach out to the Philadelphia Bicycle Network to lobby for new bike parking	2009	PSCA	--
Secure permission from City Streets Dept.	2010	PSCA / Councilman's Office	City of Phila. / Bicycle Network

5. Growing Green				
	Recommendation	Timeframe	Responsibility / Partners	Potential Source of Funds
▶	5.1 - Adopt an Area-Wide Greening Strategy			
	<i>Key Initial Action Steps</i>			
	Target new tree plantings for the north side of east-west streets	2008	PSCA / PHS	PHS Treevitalize Program
	Work with homeowners to introduce potted trees, planters and window boxes on the south side of east-west streets / connect with PHS	2008	PSCA	PHS
	Educate PSCA membership about the value of rooftop gardens	2009	PSCA	--
	5.2 - Open Up the Park			
	<i>Key Initial Action Steps</i>			
	Hire a landscape architect to create a planting plan for new park edges	2009	PSCA / Dept. of Recreation	DCNR
	Work with the City to create new park entrances and move back the existing fencing from the sidewalk	2010	PSCA / Councilman's Office	DCNR / Dept. of Recreation
	Work with the City and local sports leagues to redesign the rec spaces	2011	PSCA / Dept. of Recreation	DCNR / Dept. of Recreation
	Lobby the City for more programming at the recreation center	2011	PSCA / Dept. of Recreation	Dept. of Recreation
	Lobby for secure public restroom facilities	2011	PSCA / Dept. of Recreation / Local businesses	Local Businesses

6. Sparkling Clean (and kept that way)			
Recommendation	Timeframe	Responsibility / Partners	Potential Source of Funds
6.1 - Let's All Pitch In			
<i>Key Initial Action Steps</i>			
Look to implement two Big Belly trash cans as pilots	2010	PSCA / City of Phila.	City of Phila. / Advertising revenue
▶ Organize 9th street community clean-ups	2008-	PSCA	--
6.2 - Help Businesses Do More			
<i>Key Initial Action Steps</i>			
Go door to door to talk with business owners about paying for an organized street sweeping service	2009	PSCA	Business donations
Touch base with the Center City District and the South Street Headhouse District about estimated costs based on their experiences	2009	PSCA	--
Solicit proposals to conduct sweeping	2010	PSCA / Local Businesses	--
Determine what could be composted and reused from a typical day at the market	2010	PSCA	--
Work with an interested business to create a recycling plan - market the effort and show others how it saves them money	2011	PSCA	--
▶ 6.3 - Consider a Business Improvement District to Coordinate Improvements			
<i>Key Initial Action Steps</i>			
Reach out to the Italian Market Merchants Assoc about the possibility of becoming a BID	2008	PSCA	--
Meet with the Passyunk BID about potential expansion of their BID north along 9th Street	2008	PSCA	--

Glossary
 DVRPC = Delaware Valley Regional Planning Commission
 DCNR = Department of Conservation and Natural Resources (State)
 PennDOT = Pennsylvania Department of Transportation
 PCDC = Philadelphia Commercial Development Corporation
 PPA = Philadelphia Parking Authority
 PWD = Philadelphia Water Department
 PHS = Pennsylvania Horticultural Society
 PCPC = Philadelphia City Planning Commission
 TE funds = Transportation Enhancement Funds (Federal)
 TCDI = Transportation and Community Development Initiative (DVRPC grant)

Census Geographies

The orange line in the map at right encompasses the study area for the Lower Italian Market Revitalization Project. The demographic research for the project adopted a slightly larger boundary, including all of the City blocks highlighted in white, which correspond to the following Census Geographies:

Tract 23

Block Group 1

- Blocks 1002
- 1003
- 1004
- 1005

Tract 24

Block Group 3

- Blocks 3001
- 3005
- 3006
- 3007

Block Group 4

- Blocks 4002
- 4003
- 4006
- 4007
- 4008

Block Group 5

- Blocks 5000
- 5003
- 5004
- 5005



Census Geography Key Map.

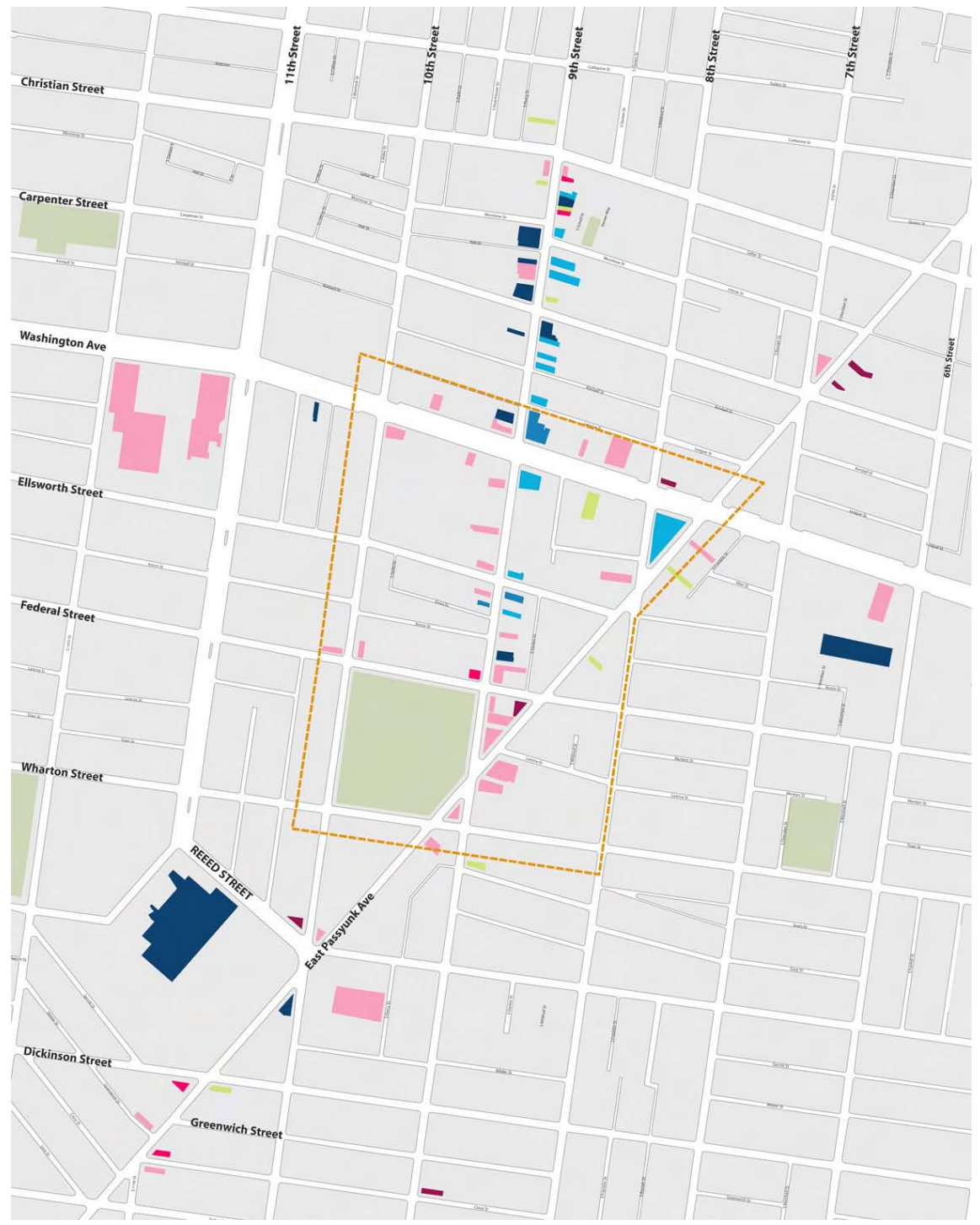
Commercial Business Distribution Blob Map Methodology

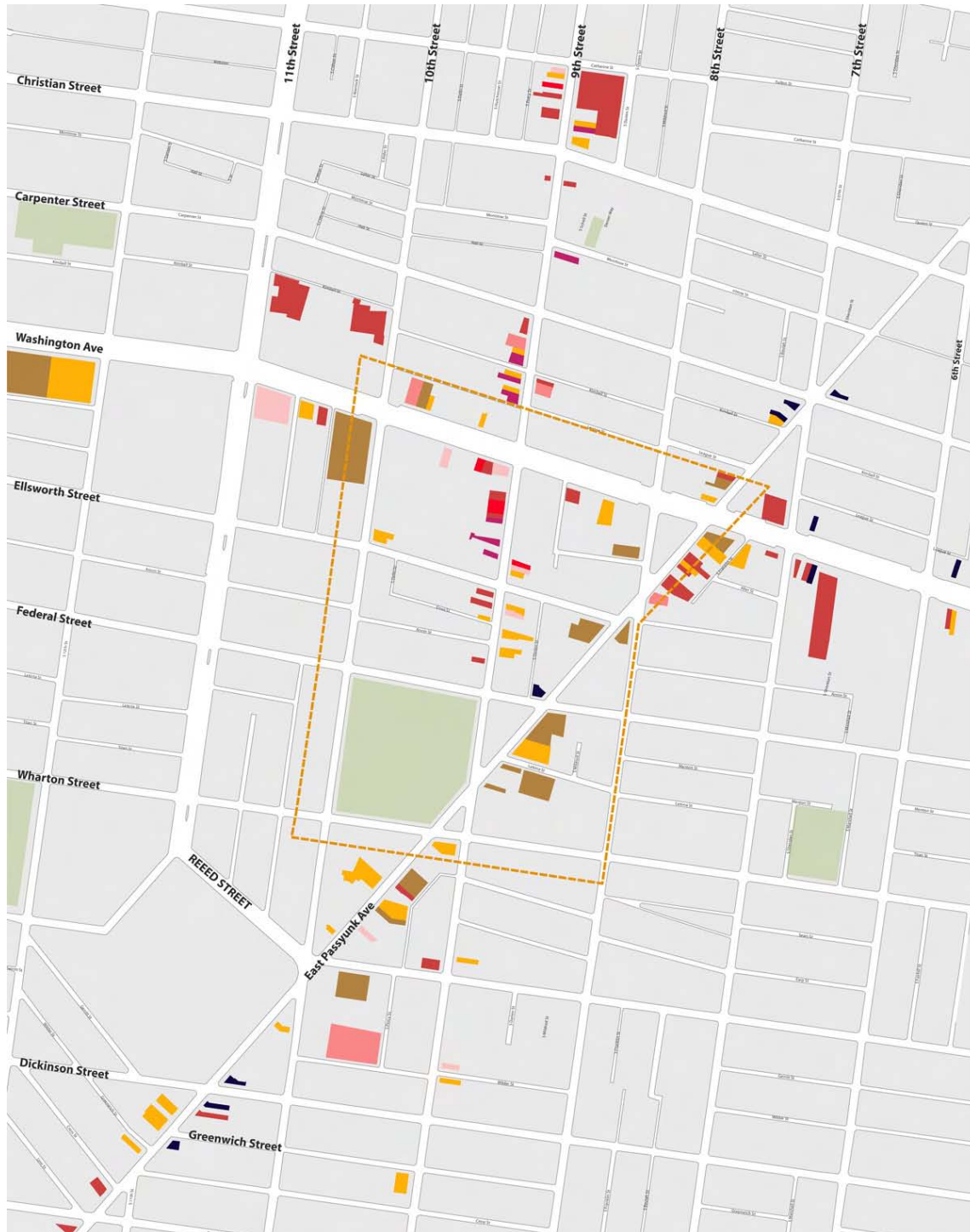
The following description and maps support the information presented in the Commercial Business Distribution section of the Lower Italian Market Revitalization Project.

Method Used to Generate the Commercial “Blob” or Cluster Maps

To generate the commercial “blob” or cluster map, we first located two like businesses within one block or a block and a half of each other, and grouped them to treat them as one entity. We then expanded the reach of the paired businesses to capture any business within one block or one and a half blocks of the pair’s center of mass, allowing the mass to expand by repeating these steps until there were no more businesses to add to the growing blob.

Overlapping of the same color blob occurs when categories that were originally separate were combined. The overlapping blobs depict overall centers of mass or greater densities of commercial activity. The overlapping arms of the blobs illustrate paths that form from one area to another where businesses connect.





Non-Food-Related Commercial

Source: Field Survey

-  Clothes
-  Convenience
-  Miscellaneous Retail
-  Music
-  Services
-  Auto-Oriented
-  Household Items
-  Office





LOWER ITALIAN MARKET

Market Analysis

Final Report Submitted To:
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Philadelphia, PA 19107

Final Report Submitted By:
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August 2008

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EXECUTIVE SUMMARY

As a key component of its Lower Italian Market Master Plan for the Passyunk Square Civic Association (PSCA), Interface Studio retained Econsult Corporation (Econsult) to conduct an economic analysis of the southern end of the Italian Market, along 9th Street between Washington Avenue and Wharton Street. The three central research questions considered in this analysis were:

1. What are the economic and market challenges with opening new businesses as well as retaining existing businesses on 9th Street?
2. For new retail spaces in the anticipated development sites at the corner of 9th and Washington, what should the PSCA encourage and why?
3. For existing retail spaces, what should the PSCA encourage given that the spaces are often small and obsolete?

The most serious economic and market challenges to the success of retail businesses are related to the overall reputation and regional perception of the quality of the Italian Market, which in turn is a function of the quality and types of retail and other businesses in the immediate area. Provided the Lower Italian Market can strengthen its reputation as one of the best specialty food centers in the city, it can thrive as a unique shopping district that offers a wealth of diverse retail for its local and regional customers.

The corridor's retail mix is essential to its success. It would be counter-productive, however, to prescribe specific retailers or goods. This limiting approach would only undercut the efficiency of the free market in metering changing demands with the appropriate suppliers of these demanded goods and services. Instead, we present a reasoned retail strategy which can serve as a guide for policy makers and business owners alike

In keeping with this strategy, key anchor positions in the anticipated development on 9th Street, just below Washington Avenue, should uphold the Italian Market's tradition of high quality specialty food. The PSCA should meet with the new owners of the site as soon as possible to discuss this retail vision and objective. Stores that are large (25,000 square feet or more), upscale, and unique will attract customers from a regional secondary market area, who will then shop throughout the corridor. This "spin-off" demand will help neighboring retailers.

The PSCA should encourage smaller specialty food and complementary stores on 9th Street. These businesses serve neighborhood needs while providing variety for regional shoppers. Non-food-related stores that fit within an "Italian Market as supermarket" business model similarly contribute to the mix, provided they are also distinctive. Other, non-distinctive neighborhood-serving stores should be encouraged to set up shop off of 9th Street. A three-tiered retail growth pattern like this would allow regional shoppers, including neighborhood residents, to have a wide variety of stores from which to choose. In addition to a successful retail strategy, Econsult recommends that PSCA work to continue to enhance the corridor's streetscape and overall urban design, consider an arts and culture strategy, and create a marketing plan that includes ongoing customer research.

1 INTRODUCTION

As a key component of its Lower Italian Market Master Plan for the Passyunk Square Civic Association (PSCA), Interface Studio retained Econsult Corporation (Econsult) to conduct an economic analysis of the southern end of the Italian Market, along 9th Street between Washington Avenue and Wharton Street (see Figure 1.1). The site was examined in the context of its role within the entire Italian Market commercial corridor, which runs from 7th Street to 11th Street and Catherine to Wharton.

Interface Studio’s and the Passyunk Square Civic Association’s primary questions concerned the retail strategy they should support for Lower Italian Market:

1. What are the economic and market challenges with opening new businesses as well as retaining existing businesses on 9th Street?
2. For new retail spaces in the anticipated development sites at the corner of 9th and Washington, what should the PSCA encourage and why?
3. For existing retail spaces, what should the PSCA encourage given that the spaces are often small and obsolete?

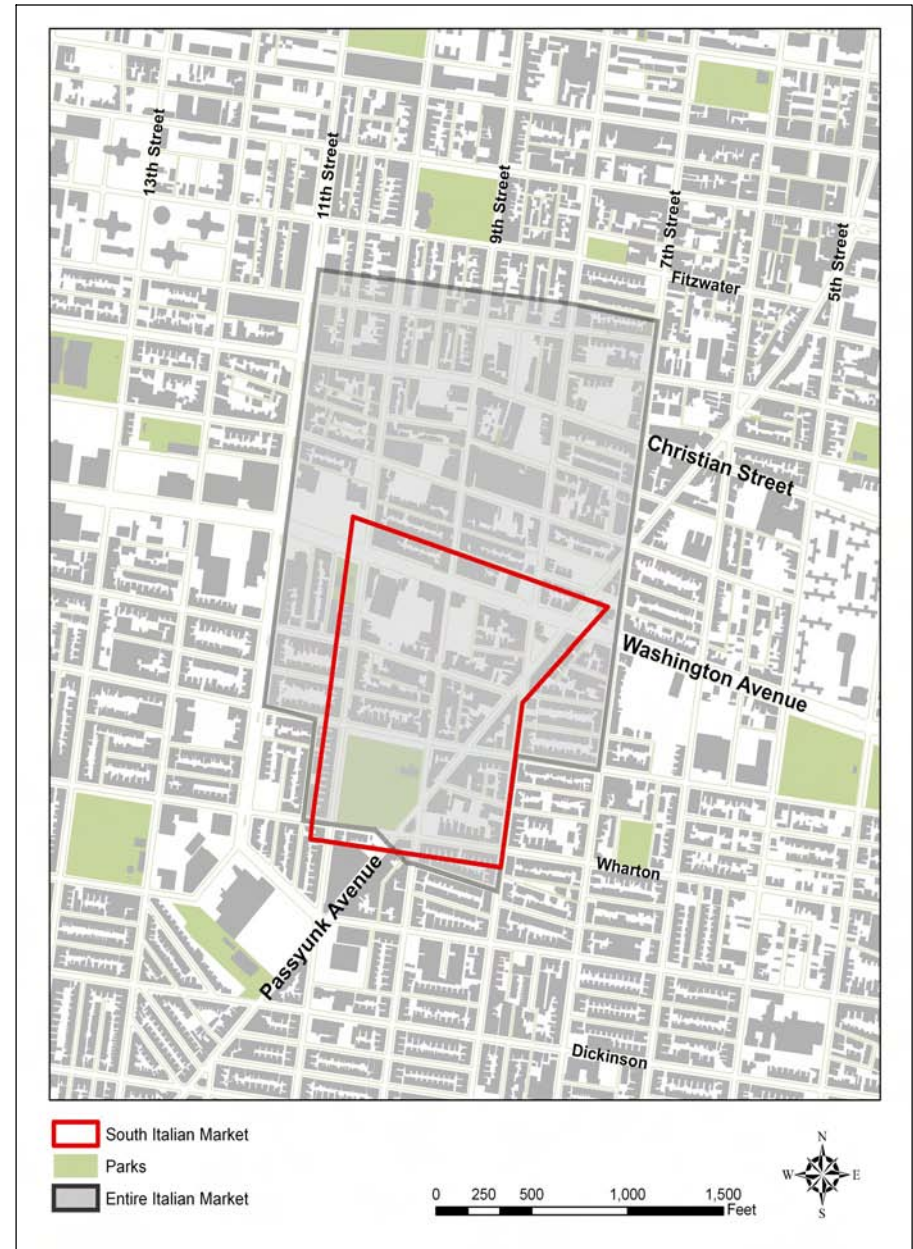


Figure 1.1 (Right) Lower Italian Market Study Area

Source: Econsult Corporation and Philadelphia City Planning Commission (2008)

2 ANALYSIS

2.1 Overview: 2002 Philadelphia Shops Update

The Philadelphia City Planning Commission (PCPC) periodically conducts an exhaustive survey of the city's 265 commercial corridors. Their most recently published report, *Philadelphia Shops Update 2002-2003*, provides a wealth of information on the Italian Market. (For an outline of the *2002 Philadelphia Shops Update*, see Appendix A.)

The PCPC categorizes the Italian Market as a "Free-Standing" corridor. That is, shoppers tend to drive to the area and then walk from shop to shop, much as they would at a supermarket or a mall. This is consistent with a corridor that relies on regional shoppers. Based on the size, level of vacancy, and the physical condition of the corridor, the PCPC considers the Market to be "Stable," (as opposed to growing, declining, or developing).

Retail planners grade corridors by size and composition to indicate how well these shopping centers can attract customers. On the low end of the scale, a "Neighborhood Subcenter," contains 10,000-35,000 square feet of gross leasable area (GLA), provides a limited selection of convenience goods, and generally draws a small, local customer base. On the high end, "Superregional Centers," like large malls or parts of Center City Philadelphia, contain as much as 2,000,000 square feet of GLA, include three or more department stores, offer a wide selection of goods and draw on a large regional market. At approximately 221,000 square feet in GLA, the Italian Market falls in the middle in terms of size. The Planning Commission, however, classifies the corridor as a "Specialty Center," which can be of any size, due to the drawing power of a substantial cluster of specialized food-related businesses.

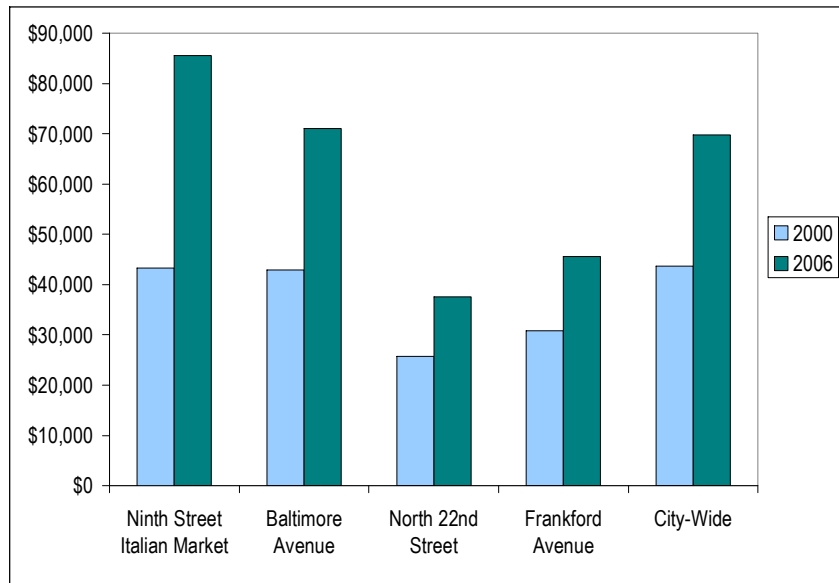
Still, the Commission rates the Italian Market's retail mix as only "fair" (on a scale of poor, fair, good and excellent). This is because the range of anchor stores and available goods does not strongly represent the corridor's traditional function as a specialty food center. It is our estimation that the inclusion of many non-food-related businesses on 9th Street has led to a decline in the strength of the corridor's retail mix, which can be detrimental to its regional drawing power.

2.2 Corridor Strength

Corridor managers generally divide their shoppers into two groups: a primary market of customers that live close by and shop often, and a secondary market of those who travel from further away to shop, albeit less frequently—though not all corridors have a secondary market. The Italian Market is able to attract a secondary market due to its distinctive goods and atmosphere, which encourage people who have many shopping alternatives—including tourists—to *choose* to patronize the district. For the purposes of this study, the primary market of the Italian Market Corridor is the area within ¼ mile of 9th and Federal Streets (or a 5-minute walk) and the secondary market is the rest of the area within 10 miles (or a 20 minute drive).

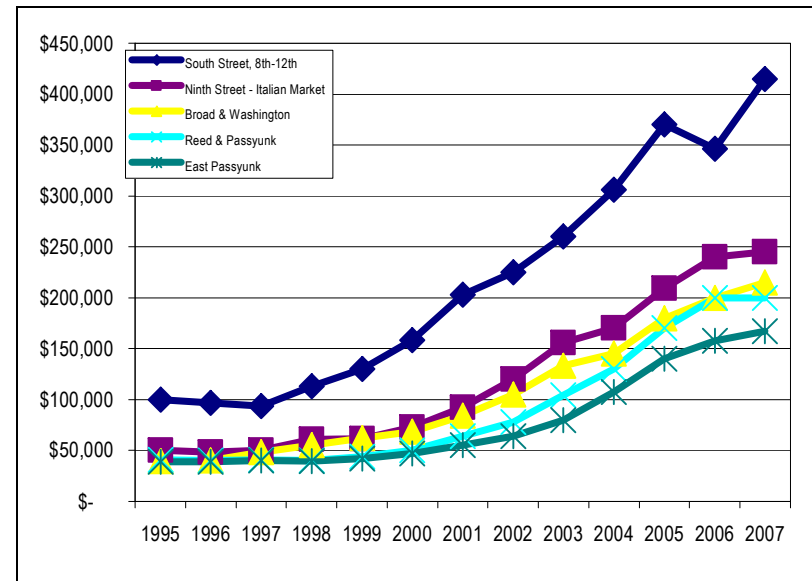
The Italian Market, as a whole, is experiencing a number of trends that contribute to its decline as a retail center specializing in produce, specialty food, and related products with a regional service area. True, a subset of the primary market in the neighborhood is growing wealthier, as measured by the rapidly increasing income of new home owners and the dramatic rise in home values in the past ten years (See Figures 2.2.1 and 2.2.2). The mean income of owner-occupied mortgage borrowers in the Italian Market rose over 97 percent from 2000-2006, compared to the city-wide increase in income of approximately 60 percent during the same period. Median house sale prices in the Italian Market corridor increased nearly 4-fold from 1995-2007, which was among the top 15 corridors with the highest growth in the city of Philadelphia. It is likely, however, that most of this wealth is concentrated towards the northern end (or Center City side) of the Market.

Figure 2.2.1 2000-2006 Change in Mean Income among Owner-Occupied Mortgage Borrowers in Selected Corridors



Source: Federal Financial Institutions Examination Council (2000,2006), Econsult Corporation (2008)

Figure 2.2.2 Median House Price Each Year for Housing Units Transacted Proximate to Italian Market and 4 Nearby Corridors



Source: Board of Revision of Taxes (2007), Hallwatch (2007), Econsult Corporation (2008)

Simultaneously, the ethnic makeup of the neighborhood is shifting to include more immigrants from Southeast Asia and Mexico; in many cases these individuals have much lower incomes. These new groups are important constituencies in the primary market, as demonstrated by the many new stores that have opened south of Washington to cater to their needs.

2.3 Retail Market Analysis

To illuminate the supply and demand for particular goods in and around Lower Italian Market, Econsult conducted a detailed analysis of retail activity in the area. This research tool, often called a leakage analysis, identifies the aggregate income within a geographic area and considers how much the average consumer spends on different retail categories. This identifies the total demand (or retail potential) for those retail categories. The model then looks to see if there is a gap between the level of demand and the level of supply of those goods by stores in the area.

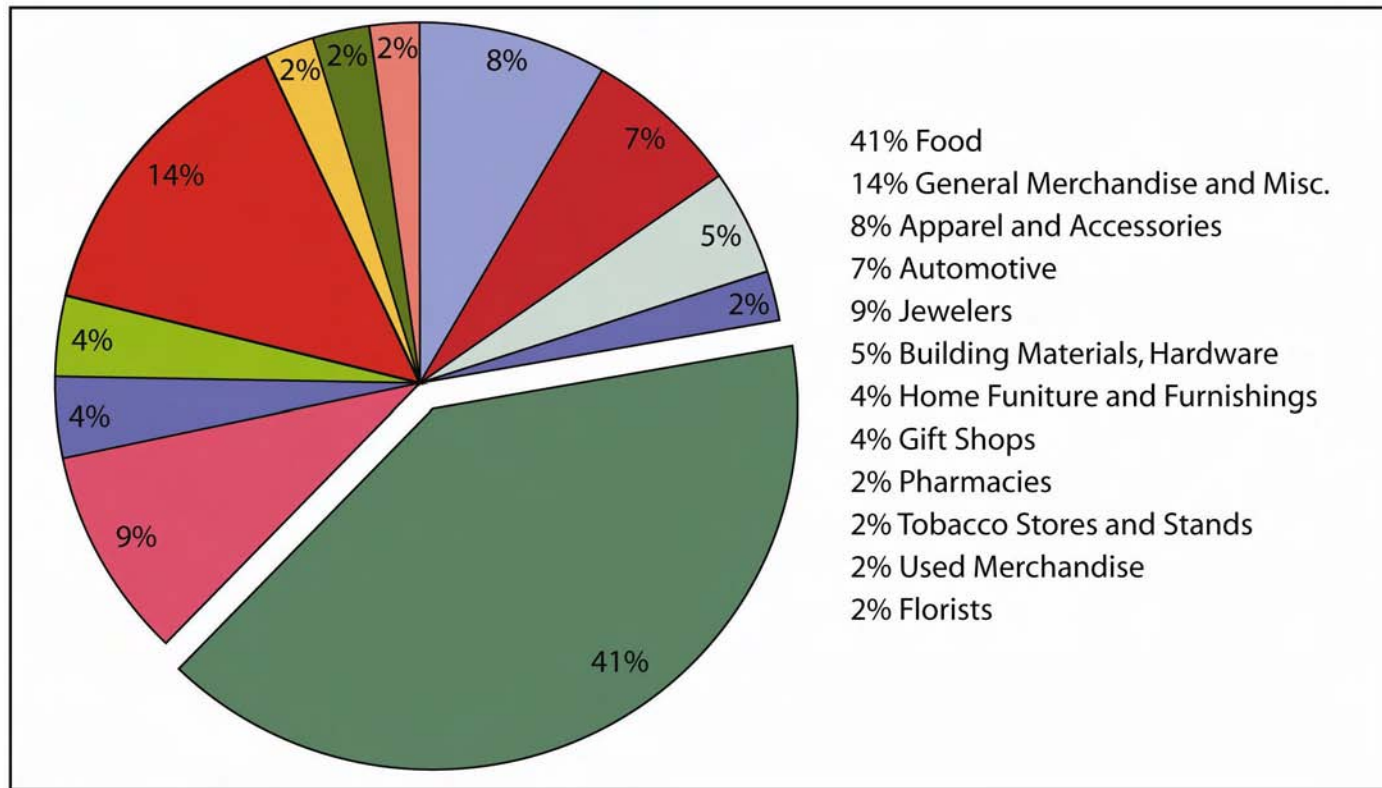
For example, based on the aggregate income and spending patterns of residents within a ½ mile radius of 9th and Federal Streets, there is a total annual retail demand of roughly \$6 million for furniture and home furnishing goods. Contrasted with a supply of approximately \$2.5 million in merchandise, there is a **positive retail supply gap** of nearly \$3.5 million. In contrast, residents demand nearly \$30 million in food and beverages, but the supply of \$50 million in goods leaves a **negative supply gap** of \$20 million per month in that category.

With a positive retail gap for home furnishings and a negative gap in food and beverage stores, one might believe it would be more profitable to set up a furniture store than a produce market. In fact, a positive retail gap indicates a “leakage” of business to another shopping area, which is already successfully competing for that business. Conversely, a negative gap indicates that the area has an agglomeration, or cluster, of goods in a particular category, which is drawing from a wide secondary market. Of course, a resourceful business person could successfully compete in either category with an appropriate business plan. The right strategy for the Lower Italian Market as a whole, however, would be to build off of the traditional Italian Market’s reputation for providing a vast array of specialty foods.

We examined primary market areas of ¼ mile, ½ mile, 1 mile as well as secondary market areas with a drive time of 10, 20, and 30 minutes. As indicated above, this market study confirms the perception that the Italian Market is a specialty center for food, food-related items, and restaurants. An analysis of the retail establishments located within a quarter mile radius of 9th and Federal streets shows that food-related businesses occupy over 40 percent of all of the retail establishments in the area (see Figure 2.3). This food-related market niche is the corridor’s most significant and enviable strength and should serve as the foundation for determining the ongoing retail strategy for the Lower Italian Market.

Additionally, residents in the primary market are currently shopping outside the corridor for a number of retail categories. These include: beer, wine and liquor stores; florists; and drinking Places (Alcoholic Beverages). These underserved categories are consistent with the retail strategy identified below in the Recommendations section of this report and would complement the current retail mix.

**Figure 2.3 Retail Establishments by Type
Quarter Mile Radius from 9th and Federal**



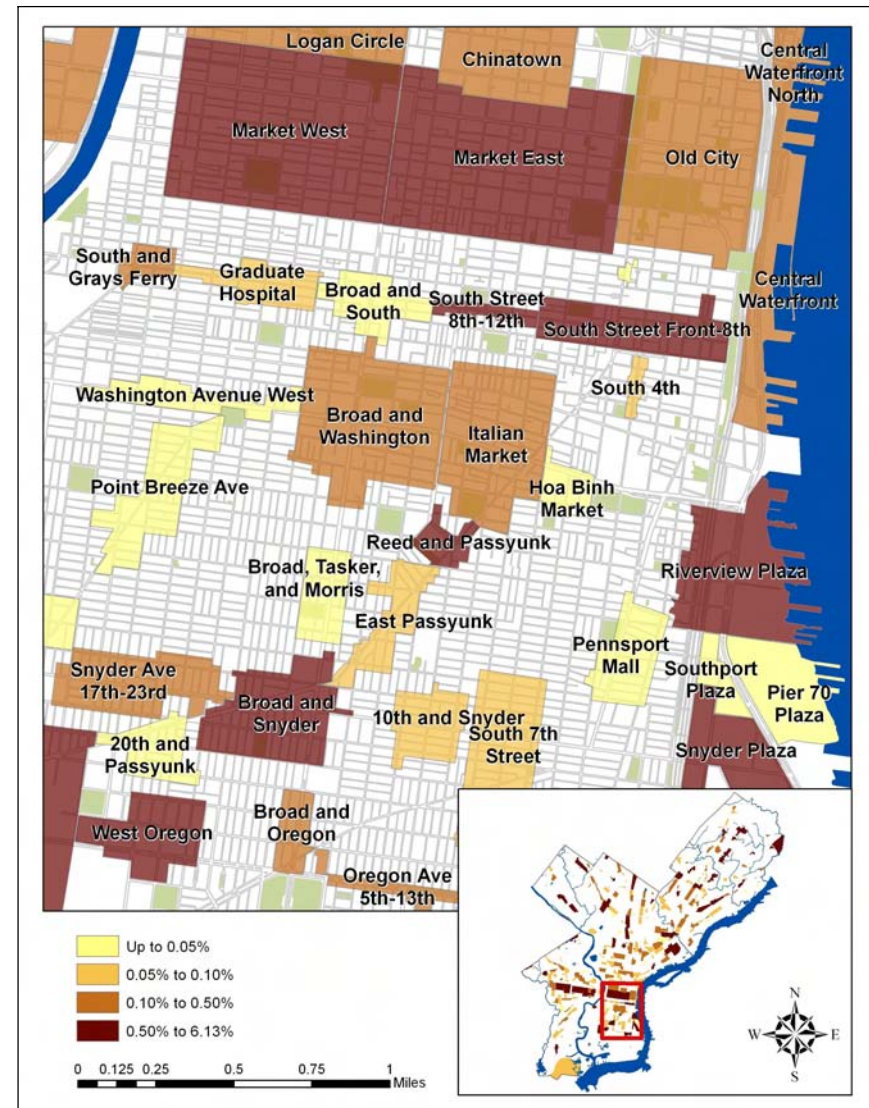
Source: InfoUSA (2008), Econsult (2008)

2.4 Consumer Choice Market Share

In the summer of 2007, Econsult conducted an extensive survey the buying patterns of Philadelphia shoppers. With a catalogue of over 10,000 shopping trips, we measured the number of excursions that ended up in each of the city’s 265 commercial corridors. The Italian Market scores respectably with a market share of 0.40 percent, higher than Passyunk Avenue to the south (0.10 percent) which is perceived to be “on the rise.”¹ The Italian Market’s score is somewhat higher than the market share of the Broad and Washington corridor immediately to the west (0.20 percent) and much higher than the specialized Hoa Bin Corridor at 6th and Washington (0.002 percent). Pedestrian surveys conducted by Interface Studio observe that foot traffic declines as one moves south from Catherine to Wharton Street. Therefore, much of this market share is likely being captured by stores in the northern end of the Market.

There are opportunities for the Italian Market to strengthen its draw on the city-wide market, if it can reinforce connections to much stronger South Street to the north and Reed and Passyunk to the south, with 0.60 percent and 1.03 percent, respectively.² It is essential that the Market capitalize on its proximity to these two strong corridors, by making it easy and attractive for shoppers to extend their visit to the Market, and by specializing in product categories that are not readily duplicated in those other corridors.

Figure 2.4 (Right) Market Share of Shopping Trips to Commercial Corridors, Italian Market and Neighboring Corridors



The Reed Group (2007), Econsult Corporation (2008)

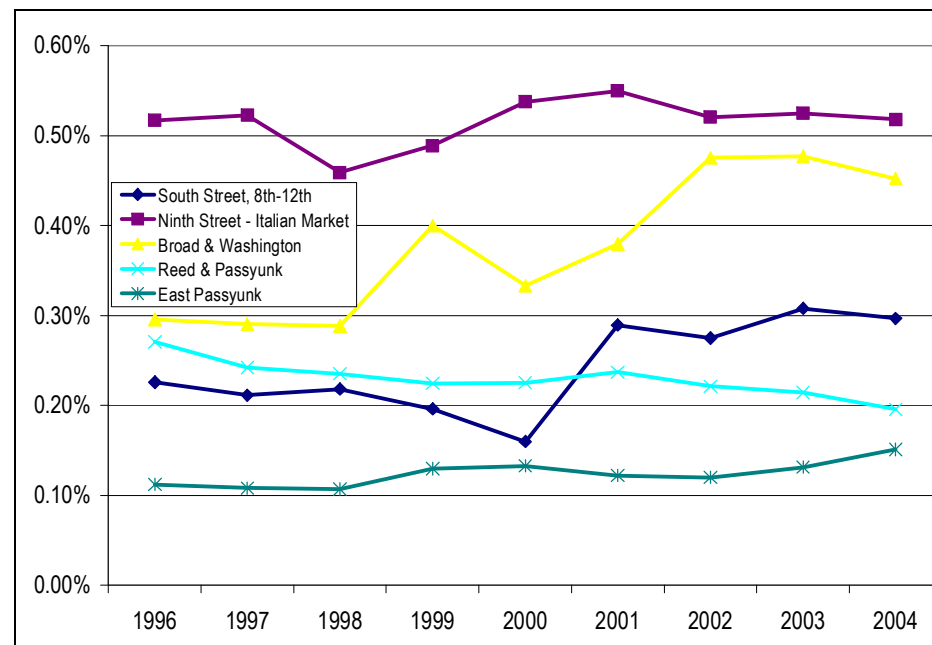
¹ Market share values seem small because they are a percentage of trips shared among 265 corridors. The median market share value was 0.177%.

² For a closer look of shopping patterns in and out of South Philadelphia, please see APPENDIX A.

2.5 Retail Sales Market Share

Above, we considered market share in terms of the percentage of Philadelphia shoppers who chose the Market above all other corridors. Here, we examine market share as a percentage of city-wide retail sales. Since this is a look at actual sales, it includes the purchases of shoppers from outside the city and region, who are critical to the Italian Market's success.

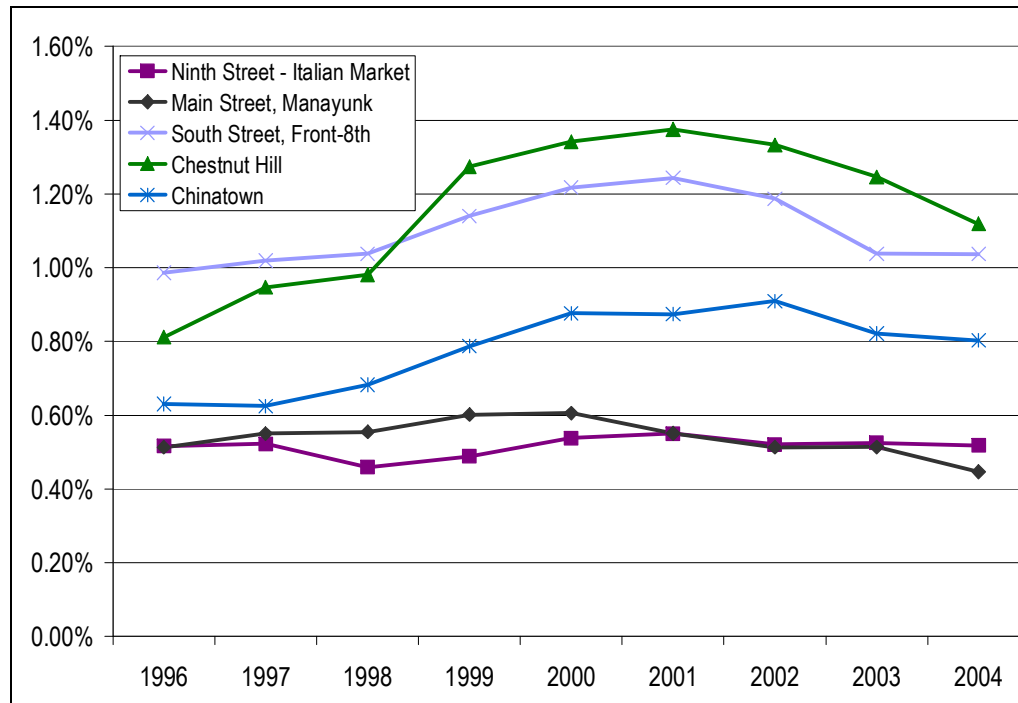
**Figure 2.5.1 Market Share of City-Wide Retail Sales 1996-2004
Italian Market and Neighboring Corridors**



Source: Philadelphia Department of Revenue

Relative to its neighboring corridors, the Italian Market's performance is strong (Figure 2.5.1). When considered as part of the city's overall volume of retail sales, however, the Market is stagnant, capturing 0.52 percent in both 1996 and 2004, with only slight volatility. During this period, the retail market in the city grew by 65%, but the Italian Market did not capture any additional share of that growth. The Broad and Washington and East Passyunk Corridors, however, increased their shares significantly (by 53 percent and 35 percent, respectively). Among its neighbors, only the Reed and Passyunk corridor, dominated by a few large retailers, lost market share.

**Figure 2.5.2 Market Share of City-Wide Retail Sales 1996-2004
Italian Market and other Marquee Corridors**



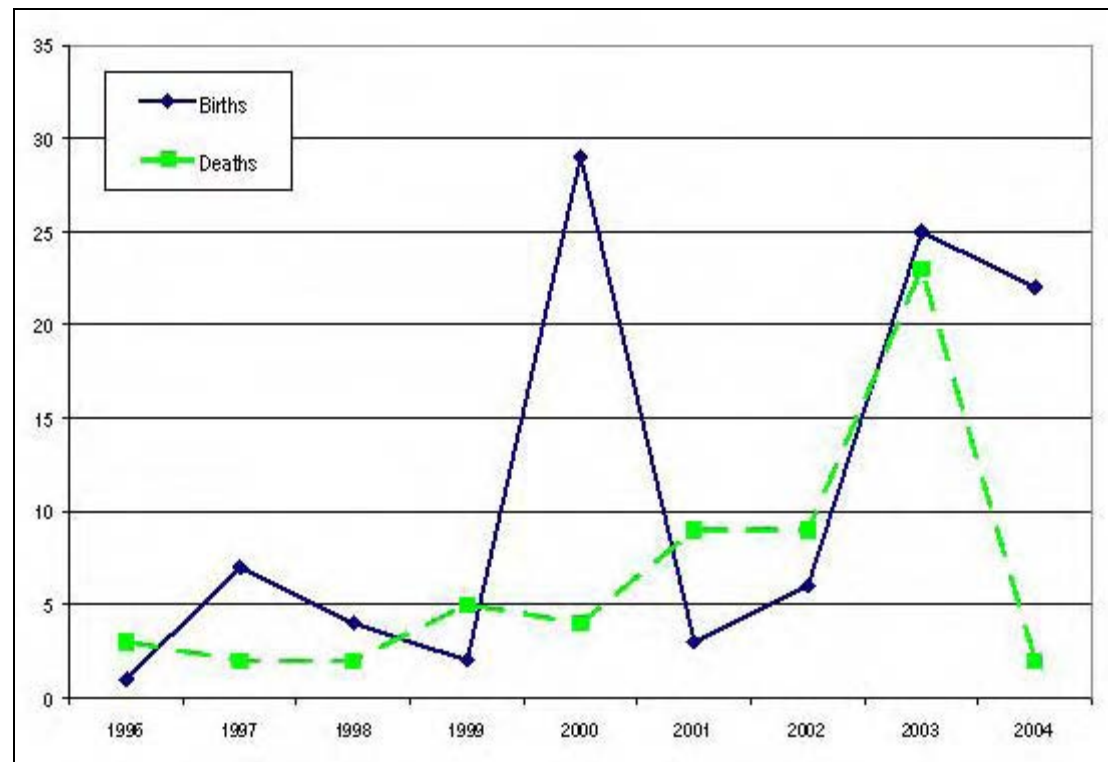
Source: Philadelphia Department of Revenue

Since the Italian Market is one of the city’s marquee shopping districts, it is useful to examine its growth alongside corridors that similarly attract the regional market. We compared the growth in retail market share in Chestnut Hill; Chinatown; Manayunk; and South Street, Front to 8th. Main Street Manayunk was the only corridor in this grouping that did not perform as well as the Italian Market, losing 13 percent of its market share. The other three shopping districts all increased their share (Chestnut Hill, 38 percent; Chinatown, 7 percent; and South Street, 5 percent), despite some volatility. Given the city-wide increase in retail growth, its location and marquee status, the Italian Market is performing below its potential.

2.6 Retail Churn

Figure 2.4.3 shows the number of new businesses starting (births) and established businesses closing (deaths). Since 2000, there has been a high volume of churn, that is, many businesses have closed and were replaced by others. This is a likely explanation for the impression among some local business owners that the Market is in decline. They most likely associate the stores that have closed in recent years with the traditional Italian Market and discount the value of new businesses. More importantly, this significant turnover signals that the Market is undergoing a period of transition. With the addition of many non-food-related stores and businesses that target a much smaller neighborhood customer base, the Market runs the risk of transforming itself from a regional attraction to a community center with a less diverse mix of goods available.

Figure 2.6 Births and Deaths of Retail Businesses in the Italian Market, 1996- 2004



Source: Philadelphia Department of Revenue

2.7 Challenges and Opportunities

The Lower Italian Market's competitiveness is linked to the health of the traditional Market (north of Washington Avenue). As a long-lived and respected food-oriented commercial corridor, the Italian Market enjoys a historic South Philadelphia streetscape and a cluster of shops that still attracts some customers from throughout the region. It even serves as a tourist destination. Provided the Italian Market as a whole can strengthen its reputation as one of the best specialty food centers in the city, it can thrive as a unique shopping district that offers a wealth of diverse retail for its local and regional customers.

The most serious economic and market challenges to the success of retail businesses on the stretch of 9th Street below Washington Avenue are related to the overall reputation and regional perception of the quality of the Italian Market, which in turn is a function of the quality and types of retail and other businesses in the immediate area.

Despite the rising incomes of home buyers and the influx of new--if lower income--populations, Market shopkeepers feel the corridor is in decline. In interviews conducted by Interface Studio, long-term business owners note that while the blocks below Washington Avenue were always the "stepchild" of the Italian Market, the declines in the 1980s and 1990s led to a degradation in the quality of merchandise and the built environment. Many feel that the Market is still undergoing a downturn today.

The Lower Italian Market neighbors another important retail and commercial corridor, East Passyunk Avenue. Unlike the Italian Market, this corridor has seen significant reinvestment, and while not as widely known, is seen as rising in attractiveness and store quality by neighborhood residents and shopkeepers.

The Italian Market's current position as a well-known specialty center--even if stagnant or in decline relative to the city-wide market--can be a solid foundation for new commercial development. Businesses that can augment the strengths of the traditional Italian Market could do well in the southern end and help the area develop as a distinct but complementary retail destination.

On the whole, these factors strongly suggest that the Market can sustain additional retail development south of Washington Avenue. Our recommendations work to strengthen the Lower Italian Market's role as a part of a regional destination for produce, specialty foods and related products, rather than let it devolve into a smaller neighborhood retail center.

3.0 RECOMMENDATIONS

Econsult presents five specific strategies to strengthen the Lower Italian Market's competitiveness: encourage the development of strong retail anchors; build on the traditional Market's traditional strength: food; enhance the streetscape; consider developing an arts and culture strategy; and create a marketing plan.

3.1 Encourage the Development of a New Retail Anchor

The anticipated commercial development at the former Ice and Coal site (the southeast corner of 9th and Washington) and across the street (the current parking lot site west of 9th St.), present excellent opportunities to add new *retail anchors* to Lower Italian Market. Through their size or distinctive wares, anchor stores contribute to the sense that a corridor is a retail *destination*, attracting shoppers who then patronize neighboring businesses. An anchor doesn't necessarily mean a single retailer, but the site should have the feel of a single destination. Econsult recommends that PSCA encourage food and food-related retail uses at these sites to underscore the corridor's reputation as a destination for food items and help bring more shoppers to the Market's southern end. The PSCA should meet with the new owners of the site as soon as possible to discuss this retail vision and objective.

Such anchors include supermarkets, large restaurants, and food-serving entertainment venues. The size or type of business, however, can vary. Stores such as Fante's Kitchen Wares or Di Bruno Brothers House of Cheese are destinations due to their reputations for providing virtually anything one might need in their respective retail categories.

It is important that *unusual* stores fill these anchor locations. A typical grocery store will not bring in customers from across town, but an upscale meat, cheese, fish, organic, locally grown, or ethnic grocery store will add distinction to Lower Italian Market and foot traffic to the entire corridor. While consumers will shop from a primary trade area because they live nearby, secondary trade area consumers will only continue to visit the Market if they are able to get something unique, in the form of either products or an overall shopping experience.

As a prominent intersection, the Southeast corner of 9th and Washington is ideal for a new retail anchor. The relatively large size of the vacant parcel provides an opportunity to make a significant impact with 25,000 square feet (or more) of food-related retail on one or two floors. PSCA should support the *densest possible use of the site*, including encouraging greater height than the surrounding buildings.

3.2 Urban Design: Enhance the Streetscape

The design of a large anchor is critical; it must not degrade the traditional pedestrian character of the corridor, and should enhance the connection to other nearby successful corridors. The last opportunity to build a relatively large anchor store in the Italian Market was the construction of the Rite Aid on the site of the demolished Palumbo's Restaurant at 9th and Catherine Streets. With parking in the front, this development significantly detracts from the traditional pedestrian streetscape. Furthermore, a pharmacy is a classic example of a neighborhood retailer, serving mainly the primary market. The Rite Aide *diminishes* the attractiveness of the Market as a regional destination.

A similar design at 9th and Washington would only increase the distance one must travel across Washington Avenue and pronounce a definite southern boundary to the Italian Market. Fante's and Pearl Art Supplies on South Street, provide good examples of how stores with relatively large floor plans can fit comfortably in a traditional corridor.

Strong urban design considerations should inform development decisions throughout the Lower Italian Market. A neighborhood that physically deteriorates over time sends a clear signal that no one is paying attention to the area. The result is an increase in crime, the degradation of the pedestrian environment, and dramatic reduction in the level of private investment.

A recent University of Pennsylvania study of neighborhoods throughout the city revealed that properties near vacant lots loose approximately 20 percent of their value, while those that are adjacent to recently greened lots increase in value by as much as 17 percent.³ Additionally, Econsult recently concluded an extensive study of commercial corridor intervention strategies throughout the city and discovered that the presence of Philadelphia Horticultural Society (PHS) Vacant Land Reclamation projects, which green vacant lots, is highly correlated with increased retail sales in a shopping district. Research has also shown that consumers perceive goods to be of a higher quality when they are found in heavily greened urban areas, and they are willing to spend approximately 12 percent more for those goods.⁴

The PSCA should build on its ongoing partnership with the PHS Treevitalize project, by continuing to focus on enhancing the streetscape. This would help send a powerful signal of public pride and participation and help extend the presence of the Italian Market south across Washington Avenue.

³ Wachter, Susan M, and Kevin C. Gillen, "Public Investment Strategies: How they Matter for Neighborhoods in Philadelphia." The Wharton School, University of Pennsylvania.

⁴ Wolf, K.L. 2005. "Business District Streetscapes, Trees, and Consumer Response." *Journal of Forestry* 103(8): 396-400.

3.3 Retail Mix: Focus on Food

The cluster of food-related businesses in the Italian Market lies at the heart of the corridor's reputation and value to the neighborhood and region. The anticipated development at the Ice and Coal site should help extend this tradition to Lower Italian Market. Therefore, Econsult recommends that PSCA lobby for an upscale specialty food store or combination specialty food store and restaurant. A good model would be the new Di Bruno Brothers store at 1730 Chestnut Street. Of course, PSCA, may wish to support a food-related business that *complements* existing retailers rather than one that directly competes with them. The key is to maintain the theme that made the Italian Market famous: *specialty food*. We expect that this recommendation would be consistent with the new owner's plans for the site, and we suggest that PSCA meet with them to discuss this strategy as soon as possible. Furthermore, the community has expressed a desire to promote a retail mix that focuses on local businesses to the exclusion of national chain stores. Through its ongoing outreach, PSCA can educate businesses about the benefits of partnering with organizations like Farm to City or Buy Local PA.

Since the corridor is constrained by existing development, there are few opportunities for stores on the market to grow in size. PSCA may encourage the developer of the Ice and Coal site to look first to existing shops in the area that are looking to expand. Stores strongly identified with the Italian Market, like Anastasi Seafood, Sarcone's Bakery, Di Bruno Bros., and Talluto's Pasta and Cheese would be ideal prospects.

Challenges and Opportunities for Small Stores

Many corridors that lack large anchor stores are nonetheless destinations, because they enjoy a cluster of small related businesses. This is true of the Antique Row on Pine Street, Fabric Row on 4th Street, and, of course, sections of the Italian Market on 9th Street.

The Italian Market as a whole, functions much like a supermarket, so small businesses on the southern end of the corridor that sell goods that fit within that model could help pull shoppers across Washington Avenue. High quality florists, coffee shops, specialty food stores, or ethnic restaurants would contribute to the retail mix. As mentioned above, food-related businesses that complement existing retailers would contribute much more to the retail mix than those that compete with them.

Individually, however, these stores are too small for anything besides local uses, and some likely diminish the potential of 9th Street. Such businesses do serve the neighborhood market, but they should be encouraged to set up shop in other areas of the commercial corridor (off of 9th Street). Ultimately, the small retail spaces on the west side of 9th Street, directly below Washington Avenue, and the parking lot behind them, should be redeveloped into something with greater density and a bigger retail footprint.

The essential challenge to creating the right store mix is to encourage new businesses that add variety to the market while supporting the traditional food-oriented retail model. Clusters of small stores that work well together can prosper, especially if they are supported by a strong retail anchor.

New Mexican food stores and restaurants, for example, add variety to the retail mix while enhancing the corridor’s reputation as an ethnic market. These businesses serve the otherwise unfulfilled demands of a growing community, while providing new retail options for groups outside the target ethnic group. These businesses are opportunities for the Lower Italian Market because they draw ethnic customers from the region and provide uniqueness to all potential customers. Of course, the changing ethnic profile of the Market can create tension; this is where PSCA’s role as a bridge-builder can serve the neighborhood.

3.4 Arts and Culture

Small-scale *food-serving* arts and cultural operations (including, but not limited to, galleries, performance venues, art house movie theatres and restaurants that showcase live or visual art) can also complement existing businesses while attracting new customers. In the Philadelphia region, arts and culture consumers spend an additional \$46.27 per person when they go an event (Figure 3.1). It is important to note that this average includes parking and expensive dining in Center City, so neighborhood impacts would likely be smaller, but still potentially meaningful.

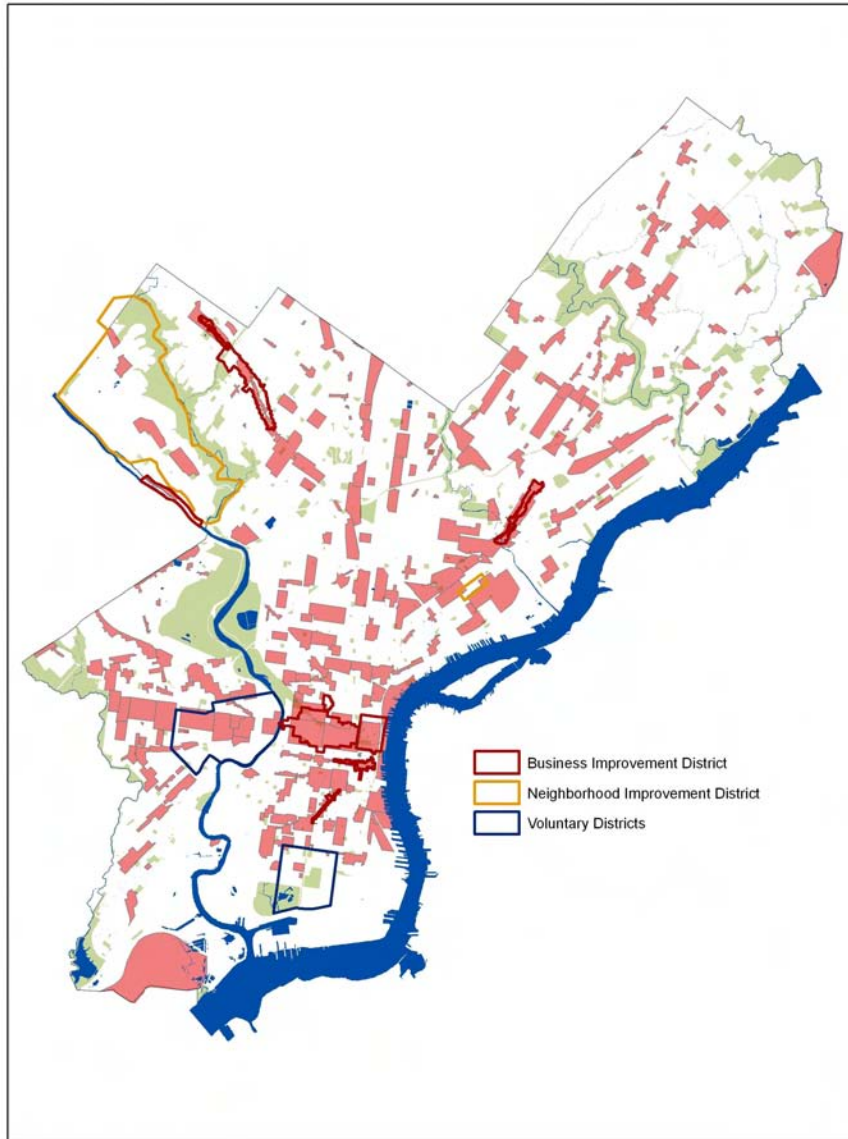
For an arts strategy to work in the Italian Market, it should be designed to create a cultural and restaurant scene with regional appeal. This can also help extend the corridor’s business hours into the evening, boost the business of nearby shops and restaurants, and, in turn, increase the revenue of nearby food vendors who supply those restaurants.

Spending Category	Average Spending Per Patron
Refreshments/Snacks During Event	\$4.83
Meals Before/After Event	\$14.01
Souvenirs and Gifts	\$3.65
Clothing and Accessories	\$1.27
Ground Transportation	\$4.88
Event-Related Child Care	\$0.43
Overnight Lodging (one night only)	\$10.98
Other	\$2.79
Total	\$46.27

Table 3.4 (Right) Arts and Culture-Related Spending by Category

Source: Greater Philadelphia Cultural Alliance (2007)

3.5 Marketing



As outlined above, the Lower Italian Market has a number of strong assets, not least of which include its traditional streetscape, its reputation as a specialty food center, and its cultural diversity. A marketing plan that emphasizes these features would help draw businesses and customers to the Market, and help boost the Market's sagging perceptions in the region. As part of this planning process, it is essential to conduct an ongoing survey to learn more about how well merchants are satisfying the needs of the Market's customers.

Business Improvement Districts

In our recently concluded study of commercial corridor intervention strategies, we discovered that the presence of an active Business Improvement District (BID) is highly correlated with increased retail sales in a shopping district. The PSCA should consider establishing a BID, or partnering with the neighboring East Passyunk Avenue BID, to organize and fund its urban design and marketing projects.

Figure 3.5 (Left) Location of Business Improvement Districts, Neighborhood Improvement Districts, and Voluntary Districts

Source: Econsult Corporation (2008)

4.0 CONCLUSION

The retail categories consistent with this strategy break down into three groups. First, the key anchor positions in the anticipated development on 9th Street, just below Washington Avenue, should uphold the Italian Market's tradition of high quality specialty food. Stores that are large, upscale, and unique will attract customers from a regional secondary market area who will then shop throughout the corridor.

Second, PSCA should encourage smaller specialty food stores on 9th Street. These businesses serve neighborhood needs while providing variety for regional shoppers. Non food-related stores that fit within "Italian Market as supermarket" model similarly contribute to the mix, provided they are also distinctive.

Third, other non-distinctive neighborhood-serving stores should be encouraged to set up off of 9th Street. A three-tiered retail growth pattern like this would allow neighborhood residents to have a wide variety of stores from which to choose, including some of the most interesting shopping in the region.

While not all-inclusive, Table 4.1 illustrates the general principle that distinctive food-related businesses that can attract customers from outside the neighborhood should take precedence on 9th Street.

Table 5.0 Ideal Retail Types, Sizes, and Locations

Type of use	Square Feet	Anchor	Appropriate for 9th Street
<i>City and Regional Market</i>			
Specialty Foods	22,500 to 45,000	Yes	Yes
Produce Market	22,500 to 45,000	Yes	Yes
Organic Food Market	22,500 to 45,000	Yes	Yes
Full Service Restaurant (with arts venue)	22,500 to 45,000	Yes	Yes
<i>Neighborhood Market</i>			
Grocery store	10,000 to 22,500	No	Yes
Full Service Restaurant (without arts venue)	10,000 to 22,500	No	Yes
Ethnic food markets	10,000 to 22,500	No	Yes
Liquor and beer	10,000 to 22,500	No	Yes
Coffee shop	1,000 to 5,000	No	Yes
Florist	1,000 to 5,000	No	Maybe
Hardware Store	1,000 to 5,000	No	No
Pharmacy	1,000 to 5,000	No	No
Bank	1,000 to 5,000	No	No
Pet Boutique	1,000 to 5,000	No	Maybe

Source: Econsult Corporation (2008)

4.1 Summary of Recommendations

In summary, efforts to improve the Lower Italian Market should focus on various ways to enhance the destination for both local and regional shoppers. Our analysis gives five specific and inter-related approaches to accomplish that objective:

- **Encourage the development of strong food-related retail anchors** for the Ice and Coal site and the developable land on the southwest corner of 9th and Washington. For the Ice and Coal Site specifically, Econsult recommends that PSCA lobby the owners for an upscale store in the range of 25,000 square feet or more that offers specialty foods or a combination specialty food store and restaurant.
- **Focus on the Market's traditional strength: Food.** Encourage a mix of distinctive high quality specialty food stores and restaurants on the corridor. New stores that do not offer food-related goods should set up off of 9th Street.
- **Enhance the streetscape.** Remember that form-based considerations that preserve the pedestrian character of the street and promote cleanliness contribute to the corridor's reputation and are, therefore, *at least as* important as the retail mix, to the extent that they help retain existing shoppers and connect new shoppers from nearby corridors.
- **Consider arts and culture.** Explore the possibility of attracting food-serving arts-related uses to the corridor. As mentioned above, a large arts and entertainment venue would serve as a retail anchor, but a cluster of smaller galleries, music or other performance venues, and/or restaurants/coffee shops that showcase art, could boost foot traffic just as effectively.
- **Create a marketing plan.** Tie the above ideas together, emphasizing the traditional ambiance and the cluster of food-related businesses as well as the growing diversity of people and shopping opportunities in Lower Italian Market. As part of this planning process, conduct an ongoing survey to learn more about how well merchants are satisfying the needs of the Market's customers. Consider establishing a BID, or partnering with the neighboring BIDs, to implement urban design and marketing projects.

APPENDIX A: 2002 PHILADELPHIA SHOPS UPDATE CORRIDOR CHARACTERISTICS

The following lists identify the different sub categories for corridor character, stage, type, and retail mix as determined in the Philadelphia City Planning Commission's 2002 *Philadelphia Shops Update*. The categories in **bold maroon** describe the Italian Market corridor.

Corridor Character Categories

- Pedestrian/Transit Corridor
- Auto-Oriented Strip
- **Free-Standing Corridor** (Consistent setbacks of buildings from the street; coordinated development and ownership; auto-oriented, with limited curb cuts and free-off street parking; internal pedestrian circulation)
- Specialty Center
- Mixed Character

Corridor Stage Categories (based on corridor size, vacancy level, and physical condition)

- **Stable**
- Growing
- Declining
- Redeveloping

Corridor Mix Categories (Considers the type of anchors relative to center type, and uses that are compatible or detrimental to center health)

- Excellent
- Good
- **Fair**
- Poor

Corridor Type Categories (Determination of customer draw based largely on the size of the corridor's gross leasable area)

- *Neighborhood Subcenter* (10,000-35,000 sq ft GL), primarily convenience
- *Neighborhood Center* (30,000-120,000 sq ft GLA) supermarket, variety store, post office, etc.
- *Community Center* (100,000-500,000 sq ft GLA) discount department store, "category killers"
- *Regional Center* (300,000-900,000 sq ft GLA) might contain one or two full-line department stores
- *Superregional Center* (500,000-2,000,000 sq ft GLA) three or more department stores or equivalent
- **Specialty Center** (Size can vary) includes a concentration of entertainment, restaurants, off-price goods, arts, or other

Source: Philadelphia City Planning Commission (2002)

APPENDIX B: NET FLOW ANALYSIS

Net Flow Analysis

The Net Flow Analysis is a tool for measuring the strength of a commercial area's secondary market while also gauging how well that location is meeting the retail needs of its residents and workers. By counting (A) the number of shoppers who *come from outside* South Philadelphia, (B) the number who *stay* in South Philadelphia to shop, and (C) the number who *leave* South Philadelphia to shop, we unearth two key observations (Table A-B).

Table A-B: Net Flow Analysis by Region and Zip Code

Region/Zip Code	Shoppers Imported (A)	Shoppers Retained (B)	Shoppers Exported (C)	Net Flow (A-C)	Percent Imported (A/A+B)	Percent Exported (C/C+B)
University City	122	95	161	-39	56.20%	62.90%
West	330	656	479	-149	33.50%	42.20%
South	450	619	313	137	42.10%	33.60%
Center	460	437	344	116	51.30%	44.00%
Northwest	292	416	317	-25	41.20%	43.20%
North	468	791	710	-242	37.20%	47.30%
Lower Northeast	481	943	524	-43	33.80%	35.70%
Upper Northeast	355	494	220	135	41.80%	30.80%
Kensington-Frankford	410	501	300	110	45.00%	37.50%
19147	141	67	84	57	67.80%	55.60%

Source: Econsult Corporation (2008)

Observation 1: Of all the shoppers in South Philadelphia, 42.1 percent come from outside of the area (see Percent Imported).

Observation 2: Of all the shoppers *who start their shopping trips in South Philadelphia*, only 33.6 percent leave the area (see Percent Exported).

Taken together, these observations indicate that South Philadelphia has a strong positive Net Flow. While there are some parts of the city that have higher proportions of their shoppers coming from outside the immediate neighborhood (such as Center City and University City), neither of those areas are as good at retaining shoppers.

Implications: South Philadelphia shoppers seem largely satisfied with the retail available. Furthermore, commercial corridors in South Philadelphia are doing a good job attracting shoppers from outside the area. While many of these corridors are auto-oriented big box centers, older traditional shopping districts in South Philadelphia, like the Italian Market, that can provide a distinctive retail niche, can draw upon this strong secondary market.