Project Report

Merion-Cynwyd Retail Strategy

Prepared for

Township of Lower Merion
Ardmore, PA

Submitted by

Economics Research Associates: Downtown Works

September 29, 2006

ERA Project No. 16568
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Introduction

ERA Downtown Works was hired by the Township of Lower Merion to develop a Retail Strategy and Implementation Recommendations for the Merion-Cynwyd business district. In this Executive Summary, Downtown Works documents the research and findings of several evaluation factors and recommends critical steps to set retail revitalization in place.

Merion-Cynwyd is a village within the Township of Lower Merion. It is approximately 10 miles from Philadelphia and considered part of the Main Line of Philadelphia. The Main Line refers to the first-ring suburbs west of Philadelphia that developed along the regional rail lines. The Merion-Cynwyd commercial district is located along Montgomery Avenue, which is a major arterial road for commuter traffic traveling into and out of Philadelphia, as well as traffic circulating within the Main Line region. The study area for this project is the original commercial district of Merion-Cynwyd.

The demographics of both the larger Main Line region and Merion-Cynwyd market areas are strong. The high median and average income levels of permanent residents in the area indicate that the surrounding markets have money to spend on various types of retail. Likewise, psychographics (lifestyle patterns), indicate that market area residents do spend disposable income on themselves and their families.

The root of Merion-Cynwyd’s challenges in becoming a successful retail district is manifested through the less than ideal mix of tenants, as well as the lack of reinvestment in storefront conditions and design. In this report, Downtown Works examines these issues and provides Merchandise Mix recommendations. Downtown Works believes a proactive and organized recruitment effort is necessary to bring strong local and regional operators to Merion-Cynwyd. Downtown Works also recommends Storefront and Signage Design Guidelines to help shape a distinct identity that embraces Merion-Cynwyd’s strengths and under capitalized potential.

Assessment

Downtown Works researched several aspects of the Merion-Cynwyd retail district, including the physical condition of every retail use and the district as a whole. In addition, Downtown Works considered the breakdown of various retail uses. Conversations and interviews with stakeholders also provided helpful information and insights regarding the retail environment in Merion-Cynwyd.

Physical Conditions

The built environment in the project area is a unique mix of commercial and residential buildings. The buildings that are located one to two blocks on either side of the intersection of Montgomery Avenue and Levering Mill Road, are conventional retail buildings. They are contiguous and one-story. The typical space size is approximately between 900 – 2,500 square feet and most of the buildings are built out to the public right-of-way or sidewalk. The further the distance from this central intersection, the more varied the building stock becomes.
Some retail operations or professional services are located in converted detached houses. These buildings are not ideal retail designs because they are set back from the sidewalk and road, they do not have designated spaces for signs, and they do not have enough fenestration for merchandise displays. Downtown Works recognizes that this is a characteristic of the project area that should be accounted for with regards to the Retail Strategy. Retail services, such as salons, and professional services, such as dentists, are often good uses for houses that have been converted to commercial uses.

Downtown Works conducted an assessment of all the retail uses in the project area. Storefronts were evaluated on four categories including, displays, signage, maintenance, and façades. In Merion-Cynwyd, there were strengths and weaknesses in all four areas.

Some retailers, such as Cooper Market, display their merchandise and/or services very well. The displays are rotated (ideally bi-monthly or monthly) and dust-free. Displays should be neither cluttered nor sparse. Signage is a challenging and important part of a retail operation and includes all signage in the storefront (temporary, window, awning, etc). Signs should be succinct, attractive, creative, well maintained, and legible. Jule’s Bottega’s is one of the better-signed stores in Merion-Cynwyd. The permanent signage is prominent, but not overstated and the temporary “sale” signage is basic and does not detract from the storefront. Other retailers, such as Boston Pizza, have stores that are meticulously maintained. The windows are spotless, sidewalks are swept routinely (ideally twice a day), cash wraps and windowsills are clean, and building components are working, clean, and/or well painted. A few retailers in Merion-Cynwyd exhibit a holistic and comprehensive approach to the façade design. The whole façade is the frame that displays the store; it forms a pedestrian or driver’s first impression of a store. It is important that the façade elements (i.e. fenestration, awning, etc.) and designs (colors, materials, etc.) are a cohesive visual presentation. Aldar Restaurant has a nicely designed storefront and well maintained façade.
Weaknesses in the physical condition of Merion-Cynwyd retail range from minor to major offenses. A sampling is listed below:

Display
- Dark tinted windows
- Dusty merchandise
- Cluttered merchandise
- Outdated displays
- No display

Signage
- Abundance of temporary posted signage
- Excessive information
- Cramped or small lettering
- Box-lit signage
- Faded signage

Maintenance
- Trash strewn in grass
- Planters not maintained
- Damaged or deteriorating siding or awnings
- Dirty windows
- Overgrown landscaping

Façade
- Incongruous materials
- Low-quality materials
- Setbacks are not ideal for retail operations
- Overstated sign band/awnings
- Air conditioning units in old transom space

Downtown Works also observed a pattern of high volume speeding traffic on Montgomery Avenue as an impediment to a safe and comfortable retail environment. According to the 2004 Merion-Cynwyd Business District Plan, some points of Montgomery Avenue have
traffic counts of over 20,000 vehicles per day. In addition, the major intersection in the commercial district is the point where five roads converge. While these roads have traffic signals they are very difficult and uncomfortable for the pedestrian to cross. Other ideal points of crossing do not have traffic signals. In addition, sidewalks are narrow and poorly maintained, which does not encourage pedestrian activity. Downtown Works also found that some private parking lots were in poor condition, under utilized, and unavailable for common parking. Some businesses, especially like-businesses located near each other, are experiencing parking challenges during peak hours.

**Retail Uses**

Downtown Works evaluated the variety of uses found in Merion-Cynwyd to determine over or under supplied categories in relation to the potential customer markets. There are 21 soft-goods retailers, 19 retail services, 11 restaurants, and 8 offices; this totals 59 occupied retail uses in the project area. The ratio of these types of uses is standard and accommodates the market fairly well. The overall commercial district would benefit, however, if the operations that constitute each category were improved. This will be discussed in further detail. A specific breakdown of retail uses is displayed in Table 1.
The presence of seven vacancies, a 10.6 percent vacancy rate, is not an alarming number. For Merion-Cynwyd, an older commercial district with older buildings, the presence of seven vacant properties is not detrimental to the area. These vacancies are opportunities to recruit new desirable retailers that will serve and expand the customer base. If the same property, however, remains vacant for an extended period of time, then it hinders the viability of surrounding retailers and the perception of the area as a whole. Proactive recruitment is necessary to find the appropriate tenant for each location. The variety of food types offered among the restaurants is balanced. Retail service uses constitute approximately 30 percent of the merchandise mix, which is acceptable in a neighborhood-oriented retail district. Ideally, the retail services should not be located on premium corners or properties.

**Stakeholder Interviews**

Downtown Works interviewed Merion-Cynwyd stakeholders. Stakeholders include people who work, live, own property, or frequent Merion-Cynwyd. There were several comments repeatedly mentioned throughout the interviews; they are noted below.
- Sidewalks are too narrow and the streets are difficult to cross
- Cars speed excessively
- Parking lots are in very poor condition, specifically private lots
- Parking space availability – not certain if real or perceived problem
- Parking availability is stressed for similar retail uses during similar peak hours
- Strong and growing Jewish community
- Additional Kosher-oriented retail would be successful
- Not all building/retail owners care about the condition of their building/storefront
- Storefronts need to be better maintained and designed
- Some business owners are not committed to events that may benefit the community as a whole
- Extended vacancies hurt the overall retail environment
- Limited pedestrian traffic
- There is some difficulty finding appropriate tenants
- New stores will not come to the area and existing stores will leave if the conditions do not improve
- The area needs additional stores, all types were mentioned: apparel, accessories, restaurants (Kosher and non-Kosher), stationary, small chain, food markets
- Destination retailers serve customers from New York City, Wilmington, and Delaware
- Outdoor dining would be a plus
- Business has grown or is stable, but margins have decreased
- The surrounding market is well-educated and affluent

**Analysis**

Downtown Works evaluated both demographic and psychographic data. Together this information, along with the physical assessment and stakeholder interviews helped to formulate the ideal merchandise direction and implementation recommendations. Downtown Works identified a primary and secondary market of customers for the commercial district.
**Figure 1: Merion-Cynwyd Market Areas**

![Map of Merion-Cynwyd Market Areas]

**Demographic Findings**

Downtown Works researched demographic information that is relevant to the retail success in Merion-Cynwyd. Merion-Cynwyd is adjacent to the city of Philadelphia and part of the larger metropolitan region, which has a population of approximately 5.25 million people. The table below displays the population and household figures for 2005 estimates and 2010 projections.
Table 2: Population and Households

<table>
<thead>
<tr>
<th></th>
<th>Philadelphia Metro</th>
<th>Montgomery County</th>
<th>Secondary Market</th>
<th>Primary Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005 Population</td>
<td>5,251,753</td>
<td>775,046</td>
<td>23,410</td>
<td>17,251</td>
</tr>
<tr>
<td>2005 Households</td>
<td>2,005,553</td>
<td>300,017</td>
<td>9,260</td>
<td>6,034</td>
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<td>2010 Population</td>
<td>5,392,022</td>
<td>798,024</td>
<td>23,897</td>
<td>17,532</td>
</tr>
<tr>
<td>2010 Households</td>
<td>2,071,183</td>
<td>310,675</td>
<td>9,505</td>
<td>6,178</td>
</tr>
</tbody>
</table>

Source, ESRI Business Analyst

The average household size is 2.6 people and 2.4 in the primary and secondary markets, respectively. The most populated age cohorts are the ages between 15 and 19, as well as between 50 and 54 years of age. These factors indicate that there are many families constituted of parents with teenage children. Figure two displays the population breakdown by age.

Figure 2: Population Breakdown By Age

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1 ESRI Business Analyst: GIS technology with extensive business and demographic data, US Census.
In both markets, the population is a majority white, constituting 82 percent of the population in the primary market and 90.5 percent in the secondary market. Downtown Works also learned through stakeholder interviews, that there is a relatively large Jewish population in Merion-Cynwyd. According to a local Rabbi, there are about 2,500 Orthodox Jewish households. In addition, the typical Orthodox Jewish household in Merion-Cynwyd is, in most cases, larger than the average household size.

Merion-Cynwyd is in an area that is home to affluent individuals and wealthy households. It is one of the wealthiest areas in the Delaware Valley Region and especially in Pennsylvania. Both residents and business owners are aware of this wealthy contingent of potential customers. Figures two and three compare the median and average household incomes of Merion-Cynwyd’s markets, the Philadelphia metropolitan area, Pennsylvania, and the United States.
Figure 3: Average and Median Household Incomes

Figure 4, below, directly displays just the average income comparisons in a visual format.

Figure 4: Average Household Incomes
It is also helpful to note the number of households that earn incomes within specific ranges. Table 6 displays this information.

**Table 3: Income Distribution By Household – Primary Market**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Number of Households</th>
<th>Percentage of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$10,000</td>
<td>220</td>
<td>3.68%</td>
</tr>
<tr>
<td>$10,000 - $14,999</td>
<td>114</td>
<td>1.91%</td>
</tr>
<tr>
<td>$15,000 - $19,999</td>
<td>127</td>
<td>2.13%</td>
</tr>
<tr>
<td>$20,000 - $24,999</td>
<td>133</td>
<td>2.23%</td>
</tr>
<tr>
<td>$25,000 - $29,999</td>
<td>150</td>
<td>2.51%</td>
</tr>
<tr>
<td>$30,000 - $34,999</td>
<td>147</td>
<td>2.46%</td>
</tr>
<tr>
<td>$35,000 - $39,999</td>
<td>166</td>
<td>2.78%</td>
</tr>
<tr>
<td>$40,000 - $44,999</td>
<td>156</td>
<td>2.61%</td>
</tr>
<tr>
<td>$45,000 - $49,999</td>
<td>170</td>
<td>2.85%</td>
</tr>
<tr>
<td>$50,000 - $59,999</td>
<td>292</td>
<td>4.89%</td>
</tr>
<tr>
<td>$60,000 - $74,999</td>
<td>580</td>
<td>9.71%</td>
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<tr>
<td>$75,500 - $99,999</td>
<td>731</td>
<td>12.24%</td>
</tr>
<tr>
<td>$100,000 - $124,999</td>
<td>552</td>
<td>9.24%</td>
</tr>
<tr>
<td>$125,000 - $149,999</td>
<td>545</td>
<td>9.12%</td>
</tr>
<tr>
<td>$150,000 - $199,999</td>
<td>553</td>
<td>9.26%</td>
</tr>
<tr>
<td>$200,000 - $249,999</td>
<td>339</td>
<td>5.67%</td>
</tr>
<tr>
<td>$250,000 - $499,999</td>
<td>730</td>
<td>12.22%</td>
</tr>
<tr>
<td>&gt;$500,000</td>
<td>269</td>
<td>4.50%</td>
</tr>
</tbody>
</table>

Source, ESRI Business Analyst
A significant percentage of households in both the primary and secondary market earn between $250,000 and $499,999 dollars (approximately 12 percent) and also between $75,000 and $99,999 (approximately 12 percent). The highest percentages in both categories are all above $50,000. All of these figures confirm the potential for more retail sales in Merion-Cynwyd.

**Psychographic Findings**

Lifestyle patterns can be determined by analyzing psychographic information, such as Tapestry © Segments. Tapestry information describes the characteristics and lifestyle choices of various demographic segments living in a defined area. It describes common living preferences, buying trends, preferred activities (sports, entertainment), and additional lifestyle choices. This information helps determine what types of stores are

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2 ESRI Business Analyst 2005 Data. Community Tapestry: The Fabric of America’s Neighborhoods. This resource uses proven segmentation methodology introduced more than 30 years ago, and classifies U.S. neighborhoods based on their socioeconomic and demographic composition.
likely successes and appropriate for Merion-Cynwyd’s commercial district. The following psychographic profiles are based on national trends and demographics; however, the profiles are attributed to the market areas based on 2005 U.S. Census data from a defined area. Figures 1 and 2 illustrate the proportion of households in both the primary and secondary market. A detailed description of the characteristics of each Tapestry segment is included in the Appendix I.

**Figure 5: Primary Market Psychographics**

![Primary Market Psychographics Diagram]

**Figure 6: Secondary Market Psychographics**

![Secondary Market Psychographics Diagram]

The psychographic research shows that the lifestyle patterns and types of people in both markets are very similar. In fact, Downtown Works has found, throughout its recent research in Ardmore and Bryn Mawr, that much of the Township of Lower Merion
population is homogenously wealthy and affluent. In both the primary and secondary markets, Connoisseurs and Urban Chic residents constitute over 50 percent of the population. Connoisseurs are the second wealthiest Tapestry group and the highest spending group. Nationally, they spend more on vacation and travel than any other group. The national median age for Connoisseurs is mid-forties and low-forties for Urban Chic residents. Urban Chic residents prefer living in urban areas and are typically politically and civically involved in their communities. Both types of residents also enjoy upscale shopping.

In both markets, the Top Rung category constitutes 13 percent of the population. Top Rung residents are more subtly wealthy than Connoisseurs; nationally, their median home value is $1 million. These residents are mostly in their lower 40’s. Pleasant-ville residents also represent 13 percent of both the primary and secondary market. These residents are prosperous single-family homeowners that have older children. Pleasant-ville residents are in their high 30’s and some are nearing retirement. Home improvement is a priority for these residents and their shopping tastes are eclectic, ranging from national chains to boutique retailers.

In the primary market, the Retirement Communities category makes up eight percent of the population. These residents are well-educated retirees. A selection of other lifestyle categories constitutes 15 percent of the primary market and 12 percent of the secondary market. The categories are identified as Metropolitans, College Towns, In Style, Wealthy Seaboard Suburbs, and Old and Newcomers. More detailed descriptions can be found in the Appendix I.

Overall, the majority of the population in both markets is well educated, prosperous, and active. Most are middle-aged and well-established adults (40 – 60 years old) in their prime earning years; a smaller portion of the population falls into the young adult category (20-35 years old). All of the psychographic groups have a comfortable disposable income and regularly spend money on luxury and pleasure items (those not necessary for daily living).

**Competitive Areas**

Merion-Cynwyd and the surrounding areas are close together and fairly dense. Downtown Works evaluated other commercial districts and shopping centers that could be potential competitors to the Merion-Cynwyd commercial district. The Merion-Cynwyd commercial district will compete against other original commercial districts in the region for ideal retailers. The shopping and strip centers will not pose as much competition as other original commercial districts because their target retailer is different from the ideal retailer for Merion-Cynwyd. The larger shopping centers are primarily recruiting national chain retailers. Merion-Cynwyd will not be recruiting national chain stores, but rather strong local or regional operators. Most of the major shopping centers house large format anchor uses, such as Super Fresh, Bed Bath and Beyond, or L.A. Fitness. These centers have a definite orientation to the automobile, which is largely evidenced by large surface parking in front of stores. This factor, combined with a location along a major local thoroughfare, contributes to an uncomfortable pedestrian environment. Merion-Cynwyd’s ability to be a more pedestrian friendly environment with a non-chain Merchandise Mix in an area with distinct storefronts is one of its greatest advantages and differentiating features. Many of
the retail areas described below also maintain their competitiveness by continually reinventing and revitalizing their retail. The shopping centers have all undergone façade renovations in the past ten years and are periodically updating their merchandise mix. Ardmore and Manayunk are both in the midst of redefining their downtowns. Merion-Cynwyd must also put this practice into place to maintain equal standing amongst the other retail offerings in the Main Line area.

Narberth

The small town of Narberth, a borough surrounded by the Township of Lower Merion, offers a unique mix of small scale, neighborhood-oriented retail. The Merchandise Mix in Narberth consists of mostly local operators and uses include neighborhood services, such as dry cleaning, a movie theatre, apparel and antiques, high-end interior design, and even two Japanese grocery stores. There are also several restaurants/pubs along Haverford Avenue, the main retail street, that are frequented by area residents. The retail rents per square foot are approximately $20 to $21 per square foot. Narberth has considerable pedestrian and vehicular traffic. The wide sidewalks and the one way traffic on the street provide a very comfortable walking environment. Downtown Narberth is not bordered by any main thoroughfares such as City Avenue or Montgomery Avenue, so through-traffic to the main retail streets is minimal. Additionally, the community (residents in conjunction with local officials) made a concerted effort to enforce the slow traffic speeds (25 mph) that create a more comfortable pedestrian environment. The street is well maintained; sidewalks are swept and potters are planted and seasonally updated. The storefronts are distinguished from one another with unique signage and varied display formats, yet are congruous as a whole. In addition, there is a well-utilized Septa R5 train station, whose outbound platform adjoins Haverford Avenue, and an ample amount of appropriately signed parking lots on and off the street. The retail rents per square foot are approximately $20 to $21 per square foot. Along Montgomery Avenue, where Penn Valley in Lower Merion adjoins Narberth, there is another cluster of retail. These stores include two local high-end women’s apparel boutiques (Knit Wit, Mendelson’s), as well as an upscale children’s boutique, three salons, a jewelry store and a corner office space. Other uses include a Staples, Wawa, and a Chinese buffet restaurant. Some of the uses are stand-alone spaces that are converted residential units (similar to Merion-Cynwyd), while others are very small strip complexes with front and rear parking.
Manayunk

Manayunk is an area adjacent to the Schuylkill River and Interstate-76. The main commercial district stretches along Main Street from Green Lane to Shurs Lane. Manayunk began its revitalization as a retail and restaurant destination in the 1980’s. Retail attractions include home furnishing and apparel stores. Restaurant attractions include strong locals, such as Jake’s, La Colombe, and Le Bus. The national operators include Vespa, Ben and Jerry’s, Restoration Hardware, Pottery Barn, and Pompanoosuc Mills. Other notable retailers include Smith Brothers, Nicole Miller, Caribou Coffee, and Benjamin Lovell. The area thrived as a district for some time, but has recently started to experience a slight decline in popularity and sales. The current mix consists of national and regional operators. Rent samples from CoStar, an urban real estate database, range from $17.50 per square foot to $45.00 per square foot, depending on the retail space’s location, size, and condition. The very large spaces have lower rent rates per square foot (i.e. $17.50). Recent efforts to revitalize Manayunk include a large initiative to orient restaurant uses and park space along the river. Typically downtown commercial districts and shopping centers will reinvent themselves with streetscape improvements, new facades, and in Manayunk’s case with a new attraction. These efforts will maintain Manayunk’s competitive edge. In addition, the number of residential units is growing significantly with new apartments and condos coming on the market. Manayunk will not pose competition for Merion-Cynwyd with regard to neighborhood retail and services, but will pose competition for destination restaurants especially as the new river plans are realized.

Bala Avenue

Bala Avenue is a small commercial district with a mix of primarily neighborhood serving retail. The physical boundaries of the commercial district are small running between Montgomery Avenue and City Avenue in Philadelphia. The existing supply of built or potential retail space is limited. In order for Bala Avenue to become a major retail center, more retail space and residential units must be built. Bala Avenue has retained its historic and charming structures, including a distinctively styled movie theatre. This adds character to the area. The rents along Bala Avenue range from the high teens to the low $20’s per square foot. Merion-Cynwyd and Bala Avenue will compete for some of the same neighborhood retailers and customers. The best way for both to be successful is for each to enhance their own strengths and identities. Merion-Cynwyd has a larger supply of retail space and a broader range of property types than Bala Avenue. In the near future, Merion-Cynwyd can recruit more retailers and house a larger concentration of retail.
Ardmore and Suburban Square

Downtown Ardmore is in the midst of a retail revitalization and recruitment effort. The current retail mix consists largely of nail and hair salons and specialty stores. The strong retailers in Ardmore are destination retailers, such as Jacques Ferber Furs, Main Line Seafood, Lonni Rossi Designs, and Rittenhouse Electric. A Retail Coordinator was hired to lead the retail recruitment effort, which is first focusing on vacancies. The function and advantages of a Retail Coordinator will be explained further in the report. Like Merion-Cynwyd, one of Ardmore’s greatest strengths is also its weakness, and that is accessibility. Both areas are very accessible to people whether they are on their way home or live nearby. Ardmore, however, is also on the Amtrak and SEPTA R5 rail line and Merion-Cynwyd is not. This accessibility, however, causes challenges with speeding traffic and less than ideal pedestrian environments. Rents per square foot in Ardmore range from the high teens to the high $20’s.

The presence of Suburban Square is undoubtedly one of Ardmore’s strengths. It is one of the best performing shopping centers in the Delaware Valley Region and has become an institution in the area. It attracts many customers to downtown Ardmore. The merchandise mix is a well-balanced selection of national chains and strong local operators. The national chains include Blue Mercury, Gap, Anne Taylor, Free People, Trader Joe’s, Theory, Williams Sonoma, Apple, and Starbucks. The local/regional retailers include Toby Lerner (apparel), Blue Tulip (gifts), Dandelion (jewelry), Josephine Sasso (apparel), Asta De Blue (apparel), and The Paperia (stationary). Although the rents in Suburban Square are proprietary information, they surpass market value, as well as the rents in most retail districts or centers in the area. While Ardmore does not currently pose significant competition to Merion-Cynwyd, it has the potential to be a primary retail destination in the greater Main Line Area.

Wynnewood Square

Wynnewood Square is along Lancaster Avenue/Route 30 just to the east of Ardmore’s commercial district. This area is not very pedestrian friendly because the vehicular speeds are high and the street is a through commuter street with no traffic calming measures. The stores are oriented to the automobile rather than the pedestrian. Specific retailers include Vinny T’s (national restaurant chain), Five Below (discount general store), Super Fresh (grocery), and Saladworks (quick service restaurant). The rents per square foot in this area range from approximately $24 to $30 dollars.

Whole Foods Market Plaza

The Whole Foods Market Plaza is another auto-oriented shopping center. It is located about a half mile to the east of Wynnewood Square on Lancaster Avenue/Route 30. The Whole Foods Market in the Whole Foods Market Plaza reports rent of $30 per square foot.
This particular Whole Foods Market is one of the retailers smallest stores at about 13,000 square feet. Newer Whole Foods Markets are now built at a minimum of 40,000 square feet. In addition to the Whole Foods Market, retailers include an upscale and popular Chinese restaurant, dry cleaners, a new fish market, and a hair salon. This center does not greatly threaten the viability of Merion-Cynwyd retail because the nature and the type of tenants in the two retail areas are very different.

Wynnewood Shopping Center

The Wynnewood Shopping Center, a strip-center surrounded by surface parking is located across from the Wynnewood R5 Train Station. The center was built in 1954 and was renovated in 2000. It is approximately 260,000 square feet and currently managed by Federal Realty. The mix consists of mostly large format national chain stores including Old Navy, Bed Bath & Beyond, Borders Books and Music, and a 98,000 square foot grocery store (Genuardi’s). The smaller format stores include GNC, Wachovia Bank, Cingular and quick service food uses. This development resembles a typical strip center, the signage is uniform in color and style and storefronts are distinguished only by signage and window displays, not by building material. The area is not particularly pedestrian friendly, as the cars tend to move quickly though the parking lot to get to different areas of the center. While there are sidewalks for pedestrians, the speed and volume of traffic prevents the area from becoming a comfortable walking environment.

Bala Cynwyd Center

The Bala Cynwyd Center is located along City Avenue and Belmont Avenue in Bala Cynwyd. The primary anchors are LA Fitness, Acme Market, and Lord & Taylor. Other uses include the Olive Garden, Foot Locker, Dress Barn, and Wachovia Bank. City Avenue is a major arterial road dividing the Township of Lower Merion and the City of Philadelphia. The wide road is not pedestrian friendly and is difficult to cross. However, efforts are being made to mitigate these pedestrian challenges. The center is oriented to the automobile and has a very large surface parking lot that separates the retail from City Avenue. In this strip center, which is also managed by Federal Realty, all of the stores blend into one another with the exception of signage, which is reflective of the branding and image of each retailer. The center will not pose significant competition to Merion-Cynwyd.

City Avenue

City Avenue is populated with strip retail, large surface parking lots, some isolated stores, gas stations, and office uses. The merchandise mix ranges from pet stores, convenient stores, restaurants, apparel, to furniture. Most of
the mix represents moderately priced regional or national operators with the exception of Lord and Taylor and Saks 5th Avenue. The mix of stores in the strip centers is not complementary to the upscale department stores. Adjacent to City Avenue, the Pathmark Center’s rent is approximately $17 per square foot. The retail is not contiguous and is along a street that is less pedestrian friendly than Merion-Cynwyd’s main street. Because of its large format retailers and its orientation to the automobile, City Avenue is not a major competitor to Merion-Cynwyd retail.

Recommendations

Downtown Works evaluated physical conditions, retail uses, demographic and psychographic information, competitive areas, and stakeholder comments for the Merion-Cynwyd project area. Based on these findings, Downtown Works is prepared to offer recommendations and strategies regarding physical improvements, the district identity, the merchandise mix, and retail recruitment recommendations for Merion-Cynwyd’s commercial district.

Physical Improvements

Downtown Works identified two distinctive types of physical improvements that would add value to Merion-Cynwyd as a retail district. The first, and most important type of physical improvement includes building and storefront design enhancements. The second type of physical improvement includes streetscape, parking, and traffic improvements.

Building Improvements

Downtown Works understands that streetscape improvements are an important part of retail revitalization; however, attractive and interesting storefront and signage design has equal or more influence in attracting other retailers and customers. Ultimately, excellent retailers with quality façades will attract customers. Retailers and property owners in Merion-Cynwyd should periodically reinvest in their buildings. Components of the façade, including the building itself, signage, and awnings should be inspected and maintained regularly. For example, façades should be repainted if chipped or faded, cleaned if dirty, and repaired if damaged. High-quality and durable materials, such as brick, stone, and glass, are recommended for future building renovations or new construction. Downtown Works recommends that the Township discourage or prohibit artificial materials, such as vinyl siding, Dryvit®, or other Exterior Insulation and Finish Systems (EIFS), and poured concrete for renovations or new construction.

Character-defining elements of the original building design should be preserved. For example, transom windows above doors should not house air conditioning units or be covered by a sign band. Windows, as display space, are dominant and critical features in storefront design. Windows should be spotless, unobstructed, and constitute at least 75 percent of the storefront. There should be no solid blank façades in a commercial district. Merchandise displays should be updated and rotated at least bimonthly, as well as accurately reflect the merchandise or services offered in the establishment. Posted paper signage in display spaces and on facades should be removed.
In addition, storefronts that are distinct from adjacent storefronts will add character and attractiveness to the original commercial district. Storefronts within the same building should be distinguished from the other storefronts, even if they are part of the same building. Homogenous signage and façades, as well as a single sign band covering multiple storefronts should be avoided. These characteristics are common in strip or shopping centers, which Merion-Cynwyd is not. One of Merion-Cynwyd’s strengths, in the context of competitive shopping areas, is that it is not a bland and uniform shopping center. Merion-Cynwyd retailers and building owners should take advantage of this potential in their district. Well-designed storefronts that are distinctive, yet complementary to the area as a whole, will attract customers and help define the area as a retail district.

**Streetscape, Traffic, and Parking**

The second type of physical improvement includes enhancements to the streetscape, parking, and the pedestrian environment. Downtown Works recommends prioritizing building improvements, façade renovations, and retail recruitment to most effectively revitalize the commercial district. The sidewalks in Merion-Cynwyd are narrow; therefore, Downtown Works supports wider sidewalks where possible. The speeding traffic on Montgomery Avenue and intersecting streets creates an unsafe and uncomfortable retail and pedestrian environment. Downtown Works does not specialize in traffic management or transportation planning, but does support further exploration and implementation of traffic calming measures as outlined in the 2004 Merion-Cynwyd Business District Plan. Some of these include traffic light timing, speed enforcement, and major lane changes.

Downtown Works also supports the 2004 Business District Plan’s recommendations to improve parking operations and management through measures such as shared parking programs, improved physical conditions, and consolidated lots. These recommendations state that refined operations and management are more accurate solutions for better parking conditions than supplying more parking. The 2004 Merion-Cynwyd Business District Plan documented a total of 644 parking spaces, of which 509 are private, 59 are in public lots, and 76 are public on-street parking spaces. This study found that at any given time, public parking is never over three quarters occupied. There are, however, parking challenges for specific businesses during peak hours. For example, parking for the restaurant uses in the eastern part of the project area is very stressed. These restaurants and event spaces (Aldar, Yi’zte, The Tavern, and the Union Firehouse) all compete for the same small amount of parking in the evening. The Union Firehouse plans to expand and utilize their second level for more frequent banquets and meetings. The available city and private lots in the western part of the project area are inconvenient for customers of the aforementioned businesses. The Township is paving a lot behind That Special Look for additional parking, which may alleviate some of the parking challenge for Aldar. Downtown Works recommends that the Township explore convenient parking solutions for the eastern edge of the commercial district.
Shared parking programs, similar to the program in Chestnut Hill in northwest Philadelphia in which property owners deed parking lot management to the local civic governing body, may alleviate parking pressures during peak hours. The 2004 Business District Plan further explains how these programs and other parking strategies may be advantageous to the area as a whole. In addition, the Township should consider relaxing parking requirements for certain uses. Parking requirements (number of spaces required) may deter ideal uses in ideal locations. For example, a restaurant may not be able to locate in the best location for its business and the commercial district as a whole because too many parking spaces are required by zoning regulations. Therefore, a less than ideal use, with a lower parking requirement, will be more likely to occupy the space. Due to the overall lack of demand for additional parking, the Township should initiate discussions with property owners to organize shared parking programs, consider relaxing current parking requirements in order to attract desirable retail uses, and address parking challenges in the eastern edge of the commercial district.

**District Identity**

The Township of Lower Merion and surrounding areas are very densely populated and it is often hard to decipher where one town or village ends and the next begins. Traditional commercial districts, which typically consist of contiguous stores built out to the sidewalk, often define one town or village from another. Such commercial districts exist in Merion-Cynwyd, Bala Avenue, Ardmore, Bryn Mawr, Narberth, Manayunk, etc.

Merion-Cynwyd should establish a strong and recognizable identity. This can be accomplished not only through an appealing merchandise mix, but also through façade design and signage. Merion-Cynwyd has the potential to enhance the visual appeal of the district in a way that other surrounding districts cannot because Merion-Cynwyd is not bound to historic building design as in other districts, such as Bala Avenue. The buildings in Merion-Cynwyd are not exceptionally historic and currently exhibit ordinary retail design. The potential exists, however, for creative and unique signage and storefronts. Also, some of 1940s and 1950s streamline moderne style architecture found, for example, in the established delicatessens could be embellished or highlighted. Appendix II includes a collection of images depicting creative, unique, attractive, design elements that are not traditional or historic, but add value to their respective retail districts. Other unique features, which may stand out as different, in Merion-Cynwyd should be embraced. One example is the burnt orange brick of Yi’tze, which is incongruous with the common and historic gray stone found in the greater Main Line area. Downtown Works is not recommending specific design criteria at this time. Rather, we are identifying existing examples that could possibly provide inspiration for design criteria that would help build a distinct and positive identity for Merion-Cynwyd.
The most effective way to unify the efforts of retailers, property owners, and the Township (incentives such as façade grants) is through a common set of Storefront and Signage Design Guidelines. Storefront and Signage Design Guidelines are currently being created for Ardmore. A professional retail designer who understands merchandising, retail, and architecture is creating them. These Guidelines outline good retail design practices that can be applied to other areas in the Township and incorporate all other pertinent Township regulations. The Guidelines will clearly outline what is allowed with both text and visual images. Downtown Works recommends that these basic Guidelines be modified with a specific section regarding Merion-Cynwyd. They can help shape, but not limit Merion-Cynwyd’s identity.

**Merchandise Mix**

The ultimate strength and success of a retail district relies on the quality of the merchandise mix. The merchandise mix pertains to the balance of various retail categories, range of product prices, and uniqueness of stores. It is important to relate the existing and potential markets’ lifestyles to the merchandise mix. If Merion-Cynwyd’s merchandise mix appropriately caters to its market population, then the area will improve as a retail district and capitalize on sales potential. The ideal merchandising mix for Merion-Cynwyd should consist of good quality independent operators, which will largely be local or regional.

Merion-Cynwyd will likely experience success with neighborhood retail, as well as destination restaurants and services. Existing building types in Merion-Cynwyd accommodate these uses with traditional retail buildings in the core of the district and single-detached homes surrounding the core used for professional or retail services. The types of retail uses in Merion-Cynwyd already accurately reflect the needs and demands of the potential markets. The condition and quality of the retail operations and buildings in Merion-Cynwyd do not, however, allow the area as a whole to fully capitalize on the surrounding markets spending patterns. The condition and quality of retail is limited for many reasons: storefronts are not cleaned daily, merchandise is not displayed well, window displays are not updated, signs are not catchy or creative, etc. In addition, some of the merchandise, while the right category for the market, is not the appropriate style for the market. All types of retail and retail services should be well maintained and carry up-to-date merchandise. Additionally, retail services that do not have merchandise to display should have well maintained and attractive store fronts. The image below (on the left) displays an attractive and well maintained dry cleaner in Narberth. The image below (right) displays a cluttered and poorly maintained dry cleaner in Merion-Cynwyd.
Downtown Works recommends upgrading the quality of the tenant mix to a level that more accurately reflects the surrounding communities’ standards and lifestyle choices, as well as potential lucrative customer markets. The surrounding markets have a significant disposable income and enjoy spending money on boutique, trend conscious, or unique items and enjoy spending their time in charming, metropolitan-inspired, and cultural environments. On a whole, they are well educated and affluent. Catering to these predominant markets entails enhancing the physical appearance of buildings and replacing outdated stagnated retail businesses with fresh, interesting, and dedicated retail businesses.

Placement is also a factor of the merchandise mix. Ideally, very active uses should occupy corners, especially key corners. For example, a restaurant open during the day and evening is an ideal use for a corner, while a bank or another retail service is not. Retail services are ideally located along side streets with better parking access and in less prominent spaces. Professional services should continue to occupy the detached converted houses that are in the periphery of the commercial district.

An upgraded tenant mix will likely achieve more sales per square foot than what is currently achieved in Merion-Cynwyd. Merion-Cynwyd’s rent structure is similar to other commercial districts in the Township. In Merion-Cynwyd, rental rates range from $15 to $30 per square foot. Rental rates in newer retail spaces range between $20 and $30 per square foot and rents in older properties are between $15 and $25 per square foot. Rent levels are typically determined by the amount of sales a retailer can generate.\(^3\) One goal of the merchandising strategy is to achieve higher sales/rent levels by bringing quality retailers with excellent merchandising skills. Higher sales/rent levels bring credibility to an area and signify high sales volumes. Retailers often use rental rates to assess the health and vitality of an area’s retail environment. In addition, higher sales/rent levels provide more capital for building/storefront improvements. It is important, for the long-term viability of Merion-Cynwyd retail, that the district remains attractive to potential new retailers. Retailers that can pay higher rents typically do an excellent job of maintaining storefronts and merchandising displays. Additionally, with higher sales/rent levels landlords have more capital to renovate and maintain the building. There are several additional factors that influence the rent level and lease details; they are described below:

- **Profit Margin** - The profit margin of a store varies greatly depending on the merchandise or service. For example, book and electronic stores generally have a lower profit margin. Whereas, jewelry stores, coffee shops and pizza restaurants have a higher profit margin because either the merchandise is very expensive (jewelry) or their retail price mark-ups are very large relative to cost of goods (coffee). The stores with higher profit margins can afford higher rent. In Merion-Cynwyd, there may be cases in which a store with a low profit margin fits into the

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\(^3\) Street-front retail stores and restaurants should produce enough sales to be able to pay a rent that equals 8-10% of gross sales. A general rule of thumb in the retail industry is that stores doing less than $250 per square foot annually are perceived to be unstable and potentially troubled.
Merchandising Mix Plan and there is an ideal space. A store with a low profit margin is by no means synonymous with a low-quality store. Although it is tempting to rent space to tenants with a high profit margin, all possible efforts should be made to secure stores that fit the Merchandising Mix Plan regardless of their profit margin.

- **Building Condition and Location** - The overall condition of a building, the condition of the specific rental space, and the proximity to other retailers are important factors in determining rent levels. For the most part Merion-Cynwyd’s rents are similar to rents in the surrounding area; however, some buildings may be overpriced for their physical condition. A more in-depth survey and analysis of building structures (interior and exterior) and rehabilitation costs are necessary to determine if some rental rates are appropriate. Stores adjacent to other well-maintained and successful retailers are premium locations.

- **Incentives** - Tenant allowances or rental rate incentives are also an important part of retail leasing and are often given by the landlord to the new tenant to update or redesign the space. Tenant allowances and rental rate incentives vary greatly and are determined through individual negotiations and the condition in which the space will be presented. Generally new construction space is delivered as a “vanilla box.” This industry term describes a space that includes dry walls, storefront, restroom, electrical and HVAC distribution, lighting, ceiling and flooring. In some cases, the developer will work with new tenants to incorporate their store’s needs into the design. Existing space is usually delivered “as is;” therefore, tenant allowances and rental incentives are almost always necessary.
Potential Retail Uses

Downtown Works believes that many types of neighborhood retail uses (those that sell goods) and services (those that sell services) are ideal for Merion-Cynwyd. Downtown Works has outlined retail categories that are under-served, adequate, or well-served in Merion-Cynwyd. Retail categories that are **under-served** should be aggressively recruited to add to the existing Merchandise Mix. **Adequate** retail categories have a presence in Merion-Cynwyd and could be expanded, but are not top recruitment priorities. **Well-served** categories have the maximum desired presence in Merion-Cynwyd and should not be recruited.

**Table 5: Merchandise Mix Recommendations**

<table>
<thead>
<tr>
<th>Retail Category</th>
<th>Underserved</th>
<th>Adequate</th>
<th>Well-served</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Soft Goods</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apparel: Children/Teens</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apparel: Men's</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apparel: Unisex Sportswear</td>
<td>X</td>
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<tr>
<td>Apparel Women's</td>
<td>X</td>
<td></td>
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<tr>
<td>Art/Framing</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Bookstore/Newstand</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Card/Gift</td>
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<tr>
<td>Cosmetics</td>
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<td>X</td>
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<tr>
<td>Food Markets</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Home Accessories</td>
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<td>X</td>
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<tr>
<td>Jewelry</td>
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<td>X</td>
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<tr>
<td>Optical Shop</td>
<td>X</td>
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<td></td>
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<tr>
<td>Personal care: specialty</td>
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<td>X</td>
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<tr>
<td>lotions &amp; soaps</td>
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<tr>
<td>Pharmacy/Convenience</td>
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<td>X</td>
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<tr>
<td>Shoes</td>
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<td>X</td>
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<tr>
<td><strong>Retail Service</strong></td>
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<tr>
<td>Dry Cleaner</td>
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<td>X</td>
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<tr>
<td>Hair Salon</td>
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<td>X</td>
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<tr>
<td>Nail Salon</td>
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<td>X</td>
<td></td>
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<tr>
<td>Tailor</td>
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<td>X</td>
<td></td>
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<tr>
<td><strong>Restaurants</strong></td>
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<td></td>
</tr>
<tr>
<td>Café</td>
<td>X</td>
<td></td>
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<tr>
<td>Delicatessons</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Full Service Restaurant</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Quick Service and Pizza</td>
<td></td>
<td>X</td>
<td></td>
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</tbody>
</table>

*Source: Economics Research Associates/Downtown Works*
It is apparent that many of the desired retail uses and services already exist in Merion-Cynwyd. Many of the retailers, however, do not exhibit quality standards in merchandising, displaying, and maintenance and many of the landlords do not commit to maintenance and appropriate storefront design.

Downtown Works also recommends that two or three additional unique cafés be recruited to complement and strengthen the existing restaurant destinations (Yi’tze, Cooper Market, Aldar, Boston Pizza). Chef-driven, charming, unique, and/or ethnic restaurants are an attractive contrast to the ever-growing population of national chain restaurants. Restaurants are destination uses within Merion-Cynwyd that tend to draw customers from a larger geographic area than neighborhood retail uses. Additional cafés may include:

- **American Regional Café**, light menu items, casual atmosphere and décor
- **Coffee/Dessert Café**, desserts, light fare, extra activities (readings, music), late hour potential
- **Regional/Celebrity Chef Restaurant**, eclectic menu with fusion foods, regional dining by locally known chef
- **International/Ethnic Restaurants**, Thai, Brazilian, Indian, Japanese/Sushi, Spanish, Mexican
- **Take Away**, prepared foods, sandwich bar, prepared meal, ideal for commuter thoroughfare
- **Kosher Restaurants**, can include any above categories, cater to the growing Orthodox Jewish population, as well as others.

While it is important to target and recruit specific types of retail uses to Merion-Cynwyd, it is also important to understand what types of retail will neither thrive, nor complement the district as a whole. Merion-Cynwyd cannot and should not compete with Suburban Square, King of Prussia or other shopping centers that are major fashion (apparel and accessory) centers. While some select apparel stores fill niche markets and are currently successful, it would be challenging to recruit additional national apparel stores. Merion-Cynwyd should not recruit additional nail or hair salons, unless existing retailers in this category leave. Merion-Cynwyd should not recruit passive uses, including banks or offices, for primary retail properties. In addition, Merion-Cynwyd should not recruit national chain stores. There are many other locations in the Main Line area (some of those discussed as competitive sites) that are more attractive to the national chains.

**Recruitment Strategy**

The Merchandise Mix will influence the overall retail success in Merion-Cynwyd. The right balance of store types and price points, as well as the quality of merchandise offered are all factors for success. The most effective way to ensure the best possible merchandise mix and sales performance is through proactive and selective retail recruitment. As evident in Merion-Cynwyd, merely placing a “For Lease” sign in the window is not effective. The
process of reformatting a tenant mix, especially in an area with existing businesses and varied property owners, takes time.

Downtown Works recommends that the Township commence proactive recruitment efforts with a Retail Coordinator. The Retail Coordinator for Ardmore is now a part-time Township employee. Downtown Works recommends that her role and services be expanded to include Merion-Cynwyd and Bala Avenue recruitment efforts. A Retail Coordinator’s primary role is to recruit retailers that fulfill the Merchandise Mix Plan, sell them on the retail vision for Merion-Cynwyd, and connect them to the necessary broker or landlord for negotiation and deal making. The role also includes establishing relationships with property owners, business owners, and brokers in Merion-Cynwyd. The Retail Coordinator should be aware of existing retail lease terms and the landlord intentions. The proactive recruitment that is necessary to truly enhance the retail environment in Merion-Cynwyd is not a financially feasible practice for commission-based brokers. Selective recruitment of the most appropriate and best performing retailers takes time. The coordinator must be determined and maintain contact to attain the desired retailers.

A Retail Coordinator will recruit retailers by first, visiting similar markets to identify and assess ideal retailers. Merion-Cynwyd must first cultivate local and regional retailers from primarily the tri-state area. Recruitment efforts should begin closer to Merion-Cynwyd and gradually expand. The initial target recruitments will be strong and desirable independent-operators with at least one successful business. While retailers with at least one store location are desirable, Downtown Works does not recommend dismissing a well-qualified entrepreneur with a well-defined concept and business plan to open a start-up business. Filling vacancies with qualified retailers would be a priority in recruitment efforts. Following vacancies, the Retail Coordinator should identify the retailers that are nearing the end of their lease (one to three years) and are most limited in their contributions to the district as a whole. A recruitment effort is a delicate balance between space availability, landlord flexibility, and prospective retailer timing and desires.

Downtown Works supports the Township’s actions to bring the Retail Coordinator in-house. This Coordinator can devote a portion of her work time to recruiting and securing the best possible retailers for Merion-Cynwyd, as well as other areas. The Township is committed to retail revitalization throughout the Township as demonstrated by the Retail Recruitment program in Ardmore, a Master Plan for Bryn Mawr, and a Retail Strategy for Bala Avenue. Downtown Works realizes that it may be necessary, at some point, to hire a second part-time Coordinator to recruit simultaneously for Ardmore, Merion-Cynwyd, Bala Avenue, and other future target areas. Centralized retail coordination would prevent a duplication of recruitment efforts, including outreach to potential retailers and property owners. Repetitious efforts would not be an efficient utilization of time or money and may confuse prospective retailers and property owners.

**Conclusion**

Merion-Cynwyd is geographically positioned adjacent to a major metropolitan area and in a dense market in which residents have significant disposable income. The median and average incomes in both Merion-Cynwyd’s primary and secondary markets are some of the highest in the area. These factors once supported a thriving commercial district and have
since sustained a selection of retailers. There is a nationwide movement to revitalize
downtowns and original commercial districts. This movement is reflective of people’s
desires to live and spend time (shop, dine, stroll) in charming areas with distinct storefronts
and buildings (which add depth and character to the street). In a society where national
chains and homogenous strip centers are dominant, people, with the resources to do so, are
turning back to downtowns to live, work, and socialize. Downtowns are a contrast to the
bland uniform strip centers or the same-old shopping mall retailer. Merion-Cynwyd can
define itself as a contrast to the homogeneity of strip centers and distinguish itself from
other original commercial districts.

Downtown Works recognizes that Merion-Cynwyd has limitations that are inherent to the
area. These include a building stock that includes converted houses as retail spaces and the
presence of a major local thoroughfare. Merion-Cynwyd’s strengths, which are strong
existing and potential customer markets and location, outweigh these weaknesses. These
strengths, however, cannot overcome a failed merchandise mix with outdated merchandise
and poor storefront conditions.

The most effective way to initiate a revitalization process in Merion-Cynwyd is two-fold.
First, the Township should expand the role of the current Retail Coordinator to include
Merion-Cynwyd’s compact retail district. The Coordinator’s efforts will be hindered or null
if retailers, brokers, and business owners are not cooperative throughout the recruitment
process. Secondly, the Township should sponsor modifications to the Storefront and
Signage Design Guidelines (originally created for Ardmore) for a Merion-Cynwyd edition
in order to capitalize on Merion-Cynwyd’s strengths and potential. The Design Guidelines
should incorporate existing Township regulations and be part of a streamlined approval
process. Building owners and retailers should accept the guidelines, understanding that
improvements to their buildings and storefronts will ultimately increase property values
and retail appeal. Additionally, Downtown Works recommends that the Township explore
a concentrated façade grant program in concert with Design Guidelines, as well as a shared
parking program and potential solutions to parking difficulties at the eastern end of the
commercial district.

It is important to remember that revitalizing and enhancing a merchandise mix is a time-
intensive process. Results are often not seen within months, but after a few years changes
will be evident. If all of these efforts progress simultaneously with the cooperation of
business owners, property owners, and the Township, Merion-Cynwyd will be embarking
on a substantial Implementation Program for a revived retail district.
Appendix I: Merion-Cynwyd Tapestry Descriptions

**Connoisseurs** – 26% - 1771 households

Second in wealth to Top Rung among the consumer markets, but first for conspicuous consumption, Connoisseurs residents are slightly older, with a median age of almost 45 years, and closer to retirement than child rearing. Their neighborhoods tend to be older bastions of affluence where the median home value tops $511,000. Growth in these neighborhoods is slow. Residents rate first among Tapestry’s segments for conspicuous consumption and spend more for personal travel and vacations than any other Tapestry segment. They also work actively for political candidates or parties, participate in civic activities, and donate to charities.

**Urban Chic** – 25% - 1736 households

Urban Chic residents are professional couples living an urbane, exclusive lifestyle. They are homeowners; many are city dwellers with a preference for expensive homes in high-rise buildings or townhomes (median value tops $472,000). Median age is 41 years. They travel extensively and embrace city life by visiting museums, attending dance performances and shopping at upscale stores. Civic-minded Urban Chic residents volunteer to work for political parties. Being news junkies, they read multiple newspapers each day and listen to news talk and public radio.

**Top Rung** – 13% - 918 households

Top Rung residents are the wealthiest consumer market—representing less than 1 percent of all U.S. households. Their median household income tops $170,000; three and one-half times the national median. Their median home value is approximately $1,000,000. These residents are in their peak earning years, 45–64, primarily in family households with no children or older children. Their median age is 43 years. With the purchasing power to indulge any choice, Top Rung residents are the best market for the purchase or lease of luxury or imported cars. They travel in style, both domestically and overseas, for business and pleasure. They set aside time in their busy lifestyles for exercise and community activities.

**Pleasant-ville** – 13% - 918 households

Prosperous domesticity distinguishes the settled homes of Pleasant-Ville neighborhoods. Most residents live in single-family homes built in the 1950s with a current median value of $272,000. Located throughout the United States, these households are headed by middle-aged residents — most have children, some are nearing early retirement. Median age is almost 39 years. Home improvement is a priority for these residents of older homes, though they employ contractors and other maintenance services to complete the work. Shopping choices are eclectic, ranging from upscale department stores and warehouse stores to big box stores and discounters.
**Retirement Communities** – 8% - 571 households

Congregate housing, which commonly includes meals and other services in the rent, is concentrated in this market. Although retirement communities can also offer owner-occupied housing and nursing care facilities, most are characterized by congregate housing.

Scattered throughout the United States, and dwelling mainly in cities, Retirement Communities residents include well-educated retirees, almost a third of whom are aged 65 years or older. Although their median household income is a relatively modest $44,400, their median net worth tops $175,000. Good health is a priority; many Retirement Communities residents visit their doctors regularly, use Weight Watchers for diet control, exercise on a stationary bike, and take vitamins and dietary supplements. Among other activities, these busy seniors spend their leisure time playing golf, attending ice hockey games, and listening to all-news and jazz radio. They like to spend time with their grandchildren and spoil them with toys, and they usually have ongoing home improvement projects.

**Other: Metropolitans** – 7.5% - 529 households

Metropolitans residents favor city living in older neighborhoods populated by singles or childless couples. These neighborhoods are an eclectic mix of single- and multifamily structures, with a median home value of $183,000. Residents include both Generation Xers and retirees, most of whom are prosperous with a median household income of more than $55,000. Busy and actively living the urban lifestyle, Metropolitans residents participate in yoga, attend rock concerts, and visit museums. They listen to jazz, news, talk, and sports radio and rent foreign videos. They travel for business or pleasure, belonging to three or more frequent flyer programs. They participate in numerous civic activities such as volunteering for environmental causes.

**Other: College Towns** – 5% - 380 households

Neighborhoods in College Towns represent on- and off-campus living. This market has a strong presence of college students; nearly 42 percent are enrolled in college and one-third of these students still live on campus. The median age is 25 years, with a high concentration of 18–24 year olds. Housing is a mix of low-income, multiunit rentals and single-family detached homes with married couples. The median home value is $119,900. Convenience is the primary consideration for food purchases; residents frequently eat out, order in, or eat ready-made or easy to prepare meals bought from the closest grocery store. Owning a laptop or desktop computer and being able to access the Internet are necessities. In their leisure time, they enjoy playing sports, attending rock concerts and college football games, and going to the movies and bars. MTV and Comedy Central are their favorite cable television channels.

**Other: In Style** – 1% - 72 households

In Style residents live in the affluent neighborhoods of metropolitan areas. More suburban than urban, these households nevertheless embrace an urban lifestyle, favoring townhomes
over traditional single-family houses. Professional couples are predominant in these neighborhoods. Labor force participation is high and most households have fewer children than the U.S. average. Their median age is approximately 38 years. Technologically savvy, In Style residents own cell phones, PDAs, and fully equipped PCs. Home remodeling and yard work are contracted out. Physical fitness is integral to their lives; they subscribe to Weight Watchers for diet control, work out in regular exercise programs, and take vitamins.

Other: **Wealthy Seaboard Suburbs** – .7% - 46 households

Wealthy Seaboard Suburbs residents remain established quarters of affluence characteristic of coastal metropolitan areas. Neighborhoods are older and slow to change, with median home values that exceed $372,000. The labor force is professional. The households consist of married couples living alone or with older children. Their median age is 42 years. Residents maximize their leisure time by relying on contractors and home services to maintain their homes and gardens. They enjoy visiting local beaches and traveling frequently. They are computer savvy but use the Internet for convenience, not entertainment.

Other: **Old and Newcomers** – .1% - 10 households

Old and Newcomers neighborhoods are in transition, populated by renters who are starting their careers or retiring. Many householders are in their twenties or above the age of 75. The median age of 36 years simply splits this age difference. Spread throughout U.S. metropolitan areas, Old and Newcomers neighborhoods have more single-person and shared households than families. Many residents have moved recently. Mid- or high-rise apartment buildings constructed in the 1970s dominate the housing market. The purchase choices of Old and Newcomers residents reflect their unencumbered lifestyle as singles and renters. Compact cars are preferred by these non-family households. Cats are the preferred pets because of apartment living. Among markets with median household income below the U.S. level, this segment has the highest readership of books. Depending on their age, they play sports such as racquetball and golf in addition to jogging or walking.
Appendix II: Samples of Creative Signage