

MEDIA ECONOMIC DEVELOPMENT STRATEGY AND IMPLEMENTATION PLAN



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TABLE OF CONTENTS

1.0	Introduction.....	1
1.1	Our Charge and Our Approach.....	1
1.2	Overview of the Report.....	2
2.0	Economic Vision and Goals.....	4
2.1	Vision Overview.....	4
2.2	Public Outreach Methodology.....	4
2.3	Summary of Public Outreach Findings.....	4
2.4	Principles for the Economic Development Vision and Goals.....	5
2.5	Vision Statement.....	6
3.0	Strengthening The Downtown Corridor.....	7
3.1	Overview of Retail in Media.....	7
3.2	The Retail Market in Detail.....	11
3.3	National Trends and Best Practices.....	21
3.4	Retail Recommendations.....	23
4.0	Everybody's Hometown: Leveraging Major Assets.....	31
4.1	Placemaking Overview.....	31
4.2	Infrastructure Overview.....	32
4.3	Framework for Placemaking and Transportation Recommendations.....	33
4.4	State Street: Media's "Street for People" Recommendations.....	33
4.5	Trolley Recommendations.....	35
4.6	Bicycling Recommendations.....	39
4.7	Bus Recommendations.....	41
4.8	Regional Rail Recommendations.....	42
4.9	Parking Recommendations.....	44
5.0	Managing Future Growth.....	46
5.1	Section Overview.....	46
5.2	New Construction.....	46
5.3	Economic Development Recommendations.....	49
6.0	Implementation Plan.....	52
6.1	Overview and Importance of an Action Plan.....	52
6.2	Summary of Recommendations.....	53
6.3	Color Coded Map.....	55
	Appendix A: Additional Retail Analysis.....	A-1
	A.1 Gap Analysis.....	A-1
	A.2 Comparative Analysis.....	A-6
	A.3 Best Practices from Around the Country.....	A-7
	A.4 Media Business Recruitment Business Plan.....	A-16
	Appendix B: About the Project Team.....	B-1



1.0 INTRODUCTION

1.1 OUR CHARGE AND OUR APPROACH

The Borough of Media, the seat of Delaware County, is a thriving community outside of Philadelphia, Pennsylvania. Its charming walkable downtown, with its mix of retail, restaurants and an annual calendar of extraordinary events, has established Media as a regional destination. The borough has a strong residential base and a stable daytime population. The town also boasts a strong housing market, a highly rated school district, and well-connected transportation infrastructure. Its population is actively engaged in arts and culture, community issues, and even public policy. Combined, these assets and attributes contribute to the creation of a very appealing environment and a desirable place to live.

Media, like many suburban communities, is undergoing a period of change and borough needs to proactively plan for its future. New developments, including the new multifamily development on the West side and a shift in the tenure of commercial development such as the new Wawa, are putting pressure on the community and its leadership to maintain its village-like feel that has driven much of its success.

State Street is the town's primary pedestrian commercial corridor and has a long history dating back to the mid-nineteenth century. Today, it is home to a mix of local and regional retail stores and restaurants. Shifts in consumer spending, how people shop, and national trends in the retail industry, present a potential threat to this retail environment. Increased demand for dining and entertainment uses is putting pressure on landlords to lease space traditionally used for retail to restaurants. Eateries and entertainment uses often command higher rents, which elevates their appeal to property owners. Shifts in daytime population stemming from a decrease in the presence of lawyers' offices have affected the daytime foot traffic. This dynamic, combined with higher rental rates, creates a challenge for the community especially if it wants to maintain a vibrant downtown.

Econsult Solutions, Inc. (ESI) was commissioned to prepare an Economic Development Strategy and Implementation Plan ("the Plan") for the borough. The Plan provides an economic development roadmap for the next five to ten years that will assist Media to maintain and promote the economic health of the borough. The effort pays particular attention to data-driven analytics and spatial assessment, along with powerful public engagement. This data-driven approach has produced recommendations that address economic development, retail attraction, place-making, transportation and marketing. A set of short and long-term action steps provide a customized implementation program, which will position Media's downtown as a sustainable and desirable place to live, work, and play.



1.2 OVERVIEW OF THE REPORT

This report provides a practical guide for an economic development strategy in Media. The report begins with an articulated vision for economic development and goals, reflecting the community's priorities, as elucidated by elected officials, business and community stakeholders, and residents. Subsequent chapters drill down with content related to the current state of retail, the state of placemaking, transportation, and development (current and planned). We have included an analysis of the local and regional market, described the national trends and best practices relevant to retail, highlighted transportation and placemaking opportunities, and identified areas for future growth and development.

The report concludes with an Implementation Plan which offers recommendations that build a framework for the future with immediate (Year 1), short term (Year 2-5) and longer term (Year 6-10) tools and tactics. It also identifies the responsible party to advance these recommendations.



Media by the Numbers

5,336 Residents in Media	\$161,700,000 Total Assessed Value of Commercial Real Estate
28% Residents 20-34 Years of Age	1,724 Residential Properties
30% Residents 55+	\$287,500 Median Residential Sales Price in 2016
7% Projected Population Growth of Residents 55+ Years of Age from 2016 to 2021	47% More Residential Sales in 2016 Compared to 2011
\$63,348 Median Household Income of Media Residents	\$1,272 Median Rent in August, 2017
59% Residents Who Have a Bachelor's Degree or Higher	11,500 Daily Ridership on the Media Regional Rail Line
6,719 Jobs in Media	93 Average WalkScore in Media

Sources: American Community Survey (2015, 2016), Delaware County Board of Assessments (2016), Rent Jungle (2017), SEPTA (2017), WalkScore.com (2017)



2.0 ECONOMIC VISION AND GOALS

2.1 VISION OVERVIEW

A local economic development vision requires community buy-in for it to succeed. The vision recommended for Media was crafted with significant input from community stakeholders, and is built around shared priorities and goals.

2.2 PUBLIC OUTREACH METHODOLOGY

The project team used a four pronged approach to solicit feedback and direction from the public. First, one-on-one interviews were set up with borough leadership, including council members as well as department heads. Next, the project team hosted four focus groups with nearly 50 people in attendance. While there was crossover between participants, the sessions were generally split into 1) business owners and operators, 2) real estate professionals and land use professionals, 3) boards and commissions, and 4) institutional stakeholders and general residents. In addition, the team conducted an online survey to capture community input on a range of issues. Over 850 participants shared their preferences regarding the retail and business mix, public space enhancements, and priorities for new investments. Finally, the team hosted a public forum to share the initial recommendations and strategies and hear final feedback from the community.

2.3 SUMMARY OF PUBLIC OUTREACH FINDINGS

Over the course of the public outreach, residents, business owners, public officials, and visitors presented their opinions of Media and shared ways they would like to see Media improve. Many focus group participants reiterated Media's slogan, "Everybody's Hometown", to express what they like about the borough, and what they want to preserve as Media grows. With the increased popularity of walkable communities and accessible amenities, residents and business owners want to make sure that Media evolves without losing the charm that makes it unique. This means different things to different stakeholders, but areas of consensus emerged.

Outreach participants were eager to keep State Street as a place to congregate, whether to dine, shop, or participate in an event, and even enhance the overall vibrancy. People were also mindful of how Media's increasing popularity is leading to higher home values, which, while positive, is making it more difficult for first time home buyers and young families to purchase in the borough. Residents want to maintain Media as a welcoming place for people of all races, ages, backgrounds and income.

Retail was an important topic at all the public outreach events. Residents and visitors enjoy Media's many restaurants and related events, like Dining Under the Stars, with 75 percent of



survey respondents satisfied or highly satisfied with the current restaurant offerings. However, some feel the borough is becoming over-saturated with restaurants, a sentiment that came across in interviews and the survey, where 20 percent of respondents indicated that there are too many restaurants in the borough. Perceptions of Media's shops were more mixed, with 35 percent of survey respondents satisfied or highly satisfied with the current retail offerings. Participants expressed a desire for the storefronts and the mix of stores to be updated and better reflect the community and its needs. There is also concern about turnover, and a sense that high rents may make it difficult for retail businesses to survive. Many of the businesses suggested that more should be done to promote Media's retailers, whether with more support from the borough or with cross-promotion with the successful restaurant scene. Notably, business owners had mixed opinions about the many festivals and events that occur on State Street, while residents were mostly satisfied with the amount and variation. Less than 10 percent of survey respondents think there are currently too many events in Media.

Transportation was another important issue to Media's residents, business owners, and visitors. Traffic and parking concerns were raised by many participants, though some felt these have been natural consequences of Media's popularity, and something to adapt to. Nonetheless, with new housing developments under construction, people expressed worry about the potential increase in car traffic. Participants also noted a lack of signs directing visitors to State Street and the downtown area, particularly at the entry points to the borough on Baltimore Avenue and at the Media SEPTA Regional Rail Station.

2.4 PRINCIPLES FOR THE ECONOMIC DEVELOPMENT VISION AND GOALS

Feedback from all phases of the public outreach helped formulate the foundational principles used to express the economic development vision and goals. This foundation rests upon the collective opinions of what Media should be like in five years.

- **Physical infrastructure** – a vibrant mix of retail, visually appealing storefronts, walkable streets, and density along State Street and Baltimore Avenue.
- **Customer experience** – consumers want a quality, unique, authentic experience that can't be replicated elsewhere, for both retail and restaurants.
- **Placemaking experience** – A memorable place, enjoyed by people of all ages due to the bustle and charm of its everyday streets, punctuated by the best festivals, community events, cultural arts, and urban amenities outside the city.
- **Future growth** – welcoming of development and people, seeking to increase diversity and maintain affordability.
- **Sentiment** – Everybody's Hometown, small town feel but active, fun, progressive, welcoming, "Keep Media Funky."



2.5 VISION STATEMENT

“The future of Media will be a sustainable community with a vibrant, walkable downtown that offers an authentic and memorable experience for people of all ages. It will be a regional destination for retail, dining, the arts and community events. As Media attracts residents, visitors, and workers, it will be a diverse and welcoming community that remains Everybody’s Hometown.”

Media’s vision statement can be viewed as an outcome of achievement and guidepost for future action. The following chapters describe specific actions to help achieve the economic development vision in the borough. The Plan focuses on strengthening the entire borough and the downtown corridor through retail, leveraging the transportation and placemaking assets, and managing future growth.

3.0 STRENGTHENING THE DOWNTOWN CORRIDOR

3.1 OVERVIEW OF RETAIL IN MEDIA

Retail is a critical ingredient to a community's economic and social health. Retail businesses add to the quality of life by providing wanted and needed options to residents, visitors and other businesses. Retail also supports the local economy through job creation and tax revenue generation. Where retail is located is also important, as it is often a catalyst for other development. However, there are paradigm shifts occurring in the retail industry, influenced by changes in consumer spending, consumer demographics and psychographics, retail products, and accelerated market access due to technology.¹ While online retail sales still are less than 10 percent of total sales, the surge of online retail makes it increasingly difficult for communities to establish and maintain a sustainable retail base.

This section details the health of the retail market in Media, along with retail gaps and potential competition from nearby towns with a similar size and feel to Media. This section also identifies national trends and best practices, as well as market-based recommendations including a business recruitment plan.

RETAIL & LEASING & DEVELOPMENT MARKET

The retail real estate market in Media is tight. Spaces rarely come on the market, especially in the downtown area. When they do, they tend to re-lease quickly in comparison to other similar downtown markets. Currently, there are four active spaces for rent in the downtown market, one of which is on State Street. The three others are just outside the borough, at the Media Shopping Center, at Providence Road & E. Baltimore Pike, which is partially located in the borough (one pad site at 2,544 SF and 2 inline spaces: 2,000 and 2,506 SF).³ Several others are purportedly coming on the market soon, when current tenants allow their leases to expire.

Rents range from \$10 per square foot for older and inline space to more than \$25 per square foot for newer space.⁴ Asking rents on some newer space is over \$25 per square foot. Average

¹ Psychographics is the study and classification of people according to their attitudes, aspirations, and other psychological criteria, especially in market research.

³ Note: only a portion of the Media Shopping Center is in the borough, but it is in the primary trade area and therefore an important retail center to track.

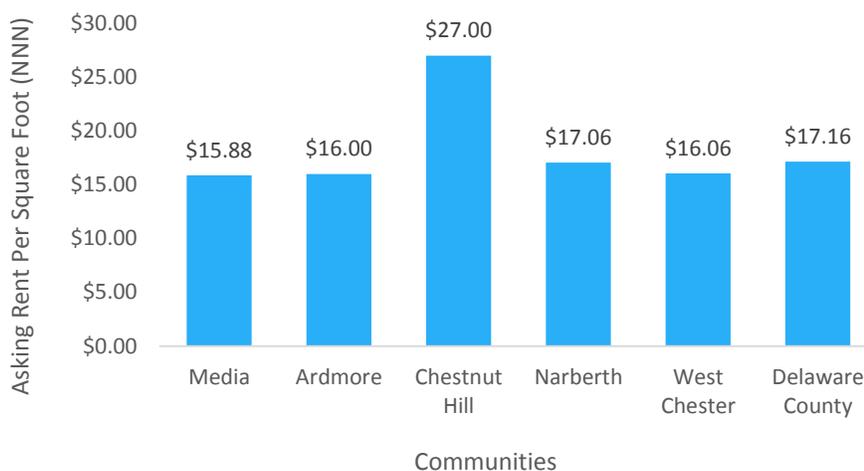
⁴ Pricing information reflects recent lease transactions. Sources include: "For Lease." LoopNet. Accessed June 16, 2017. <http://www.loopnet.com/>.

"Properties for Lease." CBRE. Accessed June 16, 2017. <http://www.cbre.us/properties/properties-for-lease>. Echo Realty. Accessed June 16, 2017. <http://www.echorealty.com/>.



rents in Media have remained stable since 2014, hovering around \$15 per square foot, triple net, similar to other smaller markets including West Chester and Ardmore (see Figure 3.1).⁵

FIGURE 3.1 – COMPARISON OF AVERAGE ASKING RETAIL RENTS



Source: LoopNet, CBRE

The retail space in the downtown area is clustered on or adjacent to State Street and along Baltimore Avenue. There is some scattered retail in the northern part of the community in the Five Points area. Many of the downtown retail storefronts average between 1,000 and 2,500 square feet on one level, with exceptions such as Turning Point Gallery, which has two levels of selling space. Restaurant spaces tend to be larger, ranging from 2,500 to 7,500 square feet. There are a few retail centers in Media, including the small strip centers at 443 E. Baltimore Pike (2,400 SF), which includes a Starbucks, and 1 State Road, in the commercial area at Five Points.

The average range of supportable retail space per capita in the US varies anywhere from 9 to 32 SF/per capita, depending on the type of location (rural versus urban, downtown versus suburban).⁶ More urban markets with a regional draw such as Media can support retail at the upper end of the range because the consumer base is larger and typically the spending power is stronger. There is an estimated 125,000 square feet of street level retail space in the downtown area, which translates to approximately 24 square feet of retail space per capita for residents of the borough.⁷ There is approximately 4,000,000 square feet of retail space in the

⁵ A triple net (NNN) lease is defined as a lease structure where the tenant is responsible for paying all operating expenses associated with a property. Triple net or NNN leases are considered “turnkey” investments since the landlord is not responsible for paying any operating expenses.

⁶ International Council of Shopping Centers, average range of supportable retail.

⁷ Does not include shopping centers or Baltimore Pike.



Secondary Trade Area (five-mile driving distance) (see Figure 3.2).⁸ This translates to 25.4 SF/per capita and it falls just above the national median of 23 SF/per capita.⁹

CURRENT STATE OF RETAIL

State Street and the adjacent blocks are central to the vitality of Media. While certain sectors of retail are under-represented, the retail environment in downtown is fairly established in a setting that is very comfortable. Downtown is one of the amenities often cited by stakeholders and respondents to the survey as what drew them to town.¹⁰ Maintaining downtown as a vibrant retail and entertainment district is essential to continuing to attract people to live, work, play and shop in Media.

Several businesses have closed in recent months, and a few others are rumored to be closing soon. These business owners stated they decided to close primarily because they were tired of running a retail operation or other personal reasons.

CHALLENGES

In a privately controlled retail environment, such as a mall or shopping center, (mall, shopping center) the owner controls and manages the property, merchandising and leasing and much of the marketing. This coordinated approach is not typically the case in a downtown environment where there are many owners, often with different visions and objectives. Moreover, in a downtown, the owners have no obligation to adhere to a community based merchandising plan or participate in marketing. They can lease to anyone they choose providing the business meets the local regulations.

In downtown Media, a few landlords have multiple buildings with a complement of smaller owners and individual landlords. Some may be inclined to keep things as they are, maintaining long-term tenants and limited property improvements, driven by an income approach rather than a community-wide vision or the community's desire for new types of retail.

The lack of available retail inventory today limits the borough's ability to update and reinvigorate the retail merchandise mix. Any tenant interested in Media will have a difficult time finding space. Ongoing business recruitment will need to address this tightness, including marketing the community consistently on a long-term basis. Creative solutions for retail space such as short term leases in non-retail locations, pop-up stores, and food and fashion trucks might also be considered.

⁸ This figure only includes retail shopping centers and developments and verifiable space downtown areas.

⁹ International Council of Shopping Centers

¹⁰ Online Perception Survey launched on August 15, 2017



Some of the retail tenants are simply out-of-date, operating under a “business as usual” model, rather than changing with the times. Some of the merchandise mix is oriented toward an older consumer base. Others have not updated their retail offerings with goods that appeal to younger consumer, nor their selling environment with contemporary materials and design. Several of the retail storefronts show evidence of wear and tear, minor maintenance issues, which if ignored can turn into more serious issues. All of these challenges limit sales potential.



Tenants who cannot afford to undertake capital improvements must rely on landlords to freshen their space. This could result in a lethargic mix of businesses and property conditions that may not be top of line or meet the needs of today’s consumers.

MOVING FORWARD

What makes a great retail street? A mix of businesses and merchandise set in a compelling environment with appealing amenities and scale that draws people in.

To sustain and improve Media’s retail offerings, the borough will need to sell its economic development vision to the business and property owners in the downtown corridor. Building consensus among stakeholders about the community’s assets, the mission and vision will be useful to deliver a consistent and cogent marketing message. The stakeholders must collectively embrace the physical and placemaking improvements and show a willingness to tweak the merchandise mix to realize long-term sustainability. This process will require a strong articulation of the goals and objectives for downtown; engagement and support of property owners and businesses who embrace the vision and are willing to support it through their own efforts and investment; a collective understanding of the value of offering contemporary merchandise in a compelling retail setting; a promise to be proactive in marketing, even adopting new social media tools; and a commitment to working together collaboratively.

Ultimately, the residents must also embrace the vision and be willing and prepared to support it including supporting local businesses.

3.2 THE RETAIL MARKET IN DETAIL

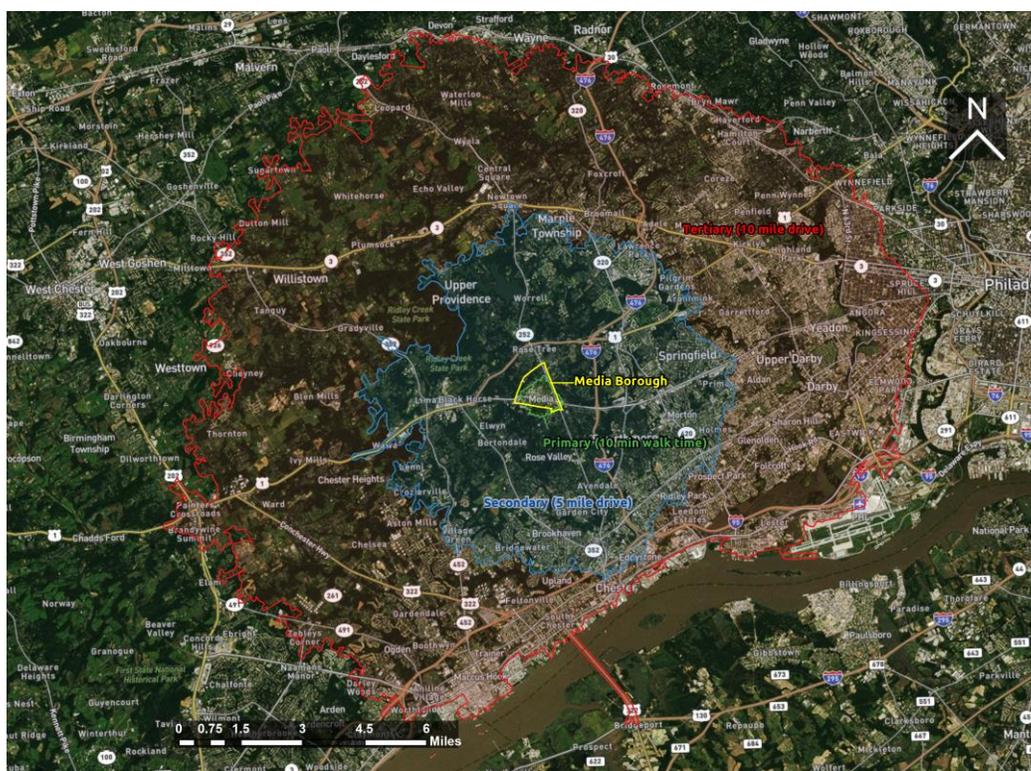
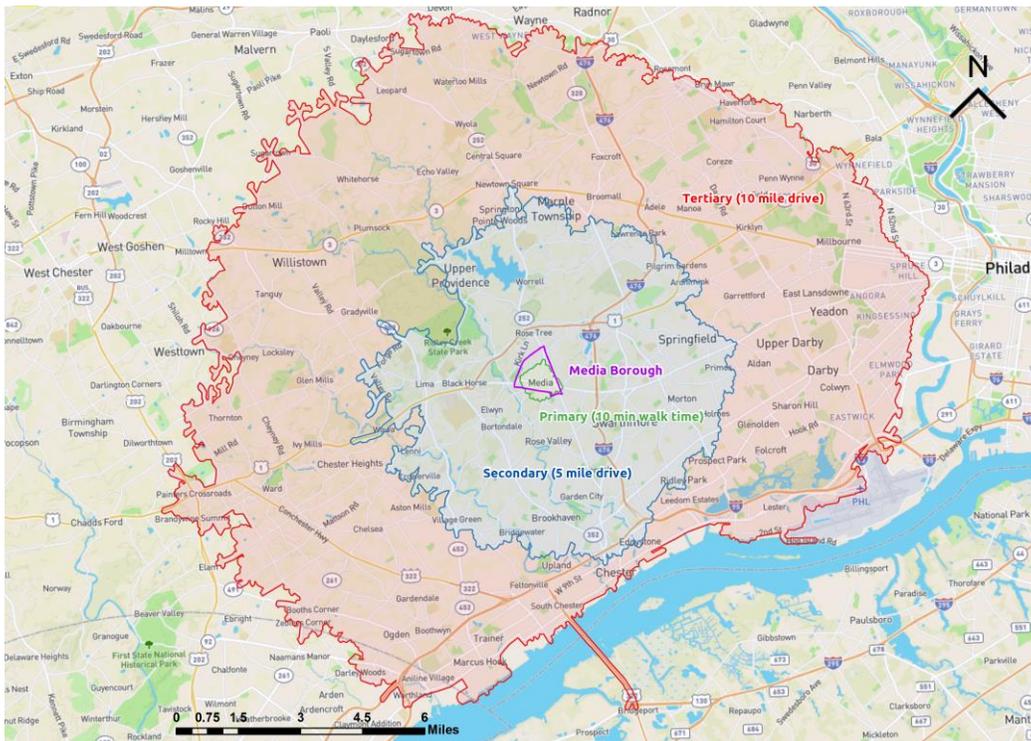
TRADE AREA

Understanding a community's trade area is central to demonstrating the potential for sales and for determining market and consumer demand for retail. Three trade areas are common when evaluating sites and their market depth. The primary trade area typically accounts for nearly 75 percent of the consumer audience, the secondary trade area covers an additional 10 to 20 percent, and the tertiary or regional trade area represents 5 to 10 percent more. Trade areas reflect "local demand" based on residential population and households within those areas.

The parameters for the trade areas for downtown Media were developed using walk times and driving distances. Physical boundaries such as infrastructure (I-95), large public spaces (parkland), and even the road network were also considered. As a result, the primary trade area represents a 10-minute walk time from the center of Media (the intersection of State and Jackson streets). The secondary trade area is captured by a five-mile drive and includes consumers from nearby towns such as Springfield, Swarthmore, and Upper Providence. Finally, the tertiary trade area represents a 10-mile drive and includes consumers from the regional market including Glen Mills, Newtown Square, Upper Darby, and Chester (see Figure 3.2).

In a market such as Media with a strong regional draw, sales in certain sectors will likely outpace local demand, suggesting that sales are coming from outside the market.

FIGURE 3.2 - TRADE AREAS: PRIMARY, SECONDARY, AND TERTIARY



Source: ESRI, Mapbox (2017)

RETAIL SALES & SPENDING IN THE MEDIA TRADE AREAS

Food and general retail are the dominant sectors in the Media market and a priority for interviewed stakeholders and survey respondents.

While there is some question if the market is saturated, restaurants are performing well. And there is unmet demand for restaurants within the region. Table 3.1 provides a snapshot of retail demand and sales

in the individual trade areas. The total supply/sales of retail goods and

food and drink in the borough is \$166 million, and exceeds local demand by more than \$52

million. Demand for food and drink in the primary trade area (10-minute walk time) is \$8.5

million, and overall demand for retail is \$82 million.

\$82M

Total Retail Demand
within the primary
trade area

Sales of food outpace demand in Media and the primary trade area, demonstrating that Media businesses are benefitting from a customer base beyond the local community. The strong sales are likely due to Media's reputation as a dining destination and special events such as Dining Under the Stars. However, in the secondary trade area demand outweighs sales by more than \$40 million. The excess demand potentially shows an opportunity for several new eateries in Media, or an opportunity for existing restaurants to capture a greater share of the larger market.

This information, along with the analysis of general retail sectors, will inform recommendations around retail including what opportunities exist for new retail uses, what type of retail is sustainable, and how to diversify the retail merchandise mix.

TABLE 3.1 – RETAIL MARKETPLACE PROFILE, IN MILLIONS

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap*
Media Borough			
Total Retail Trade & Food & Drink	\$113	\$166	(\$53)
Total Retail Trade	\$103	\$139	(\$36)
Total Food & Drink	\$11	\$27	(\$17)
Primary Trade Area (10-Min Walk time)			
Total Retail Trade & Food & Drink	\$91	\$144	(\$54)
Total Retail Trade	\$82	\$119	(\$37)
Total Food & Drink	\$9	\$25	(\$17)
Secondary Trade Area (5-Mile Drive)			
Total Retail Trade & Food & Drink	\$2,997	\$2,776	\$221
Total Retail Trade	\$2,717	\$2,536	\$180
Total Food & Drink	\$281	\$240	\$41
Tertiary Trade Area (10-Mile Drive)			
Total Retail Trade & Food & Drink	\$12,036	\$8,388	\$3,648
Total Retail Trade	\$10,912	\$8	\$3,281
Total Food & Drink	\$1,125	\$758	\$367

Source: ESRI (2017)

*Green indicates leakage, where sales are leaving the market. Red indicates a surplus, where sales exceed demand.



See Appendix A.1 for the sales and demand for individual retail sectors within the borough and the trade areas as well as a breakdown of food spending by subcategory.

Spending on food and dining out is rising across the country, and Media mirrors these trends. The restaurants in Media are a strong retail asset and a regional draw. They attract customers from the community and outside the area including from Delaware and Philadelphia. However, the community has expressed some concern that there may be too many restaurants in the borough. To better understand how food related retail fits within the overall retail mix, we analyzed how much consumers are spending in various food categories. Table 3.2 breaks down food spending by subcategory.

TABLE – 3.2 – MEDIA FOOD SALES (RETAIL EXPENDITURE REPORT), IN MILLIONS

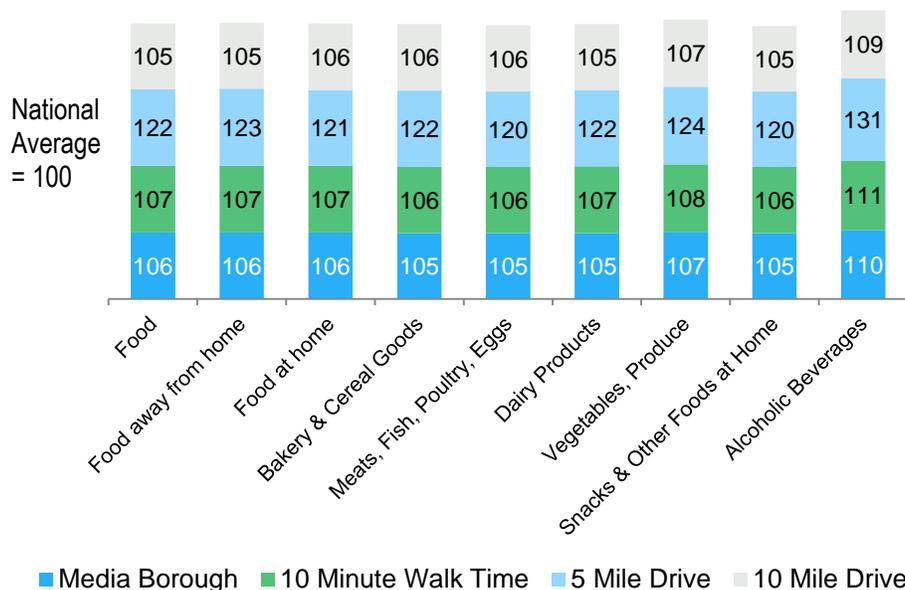
Trade Area	Total Food Spending	Food Away from Home	Food at Home	Bakery & Cereal Goods	Meats, Fish, Poultry, Eggs	Dairy Products	Vegetables, Produce	Snacks & Other Foods at Home
Media Borough	\$23	\$9	\$14	\$2	\$3	\$2	\$3	\$5
10-Min Walk Time	\$18	\$7	\$11	\$2	\$3	\$1	\$2	\$4
5-Mile Drive	\$591	\$228	\$362	\$49	\$80	\$39	\$71	\$123
10-Mile Drive	\$2,425	\$928	\$1,498	\$204	\$335	\$159	\$290	\$510

Source: ESRI (2017)

The next step in the analysis is to examine the general retail goods and food sales in detail. Indices are helpful to understand how a community performs against national averages. The national average for household spending on each category is indexed to 100. Anything above 100 suggests household spending above the national average for that category, anything below 100 indicates household spending falls under the national average. A one or two-point shift is considered marginal, while any shift greater than 10 points indicates a strength or weakness.

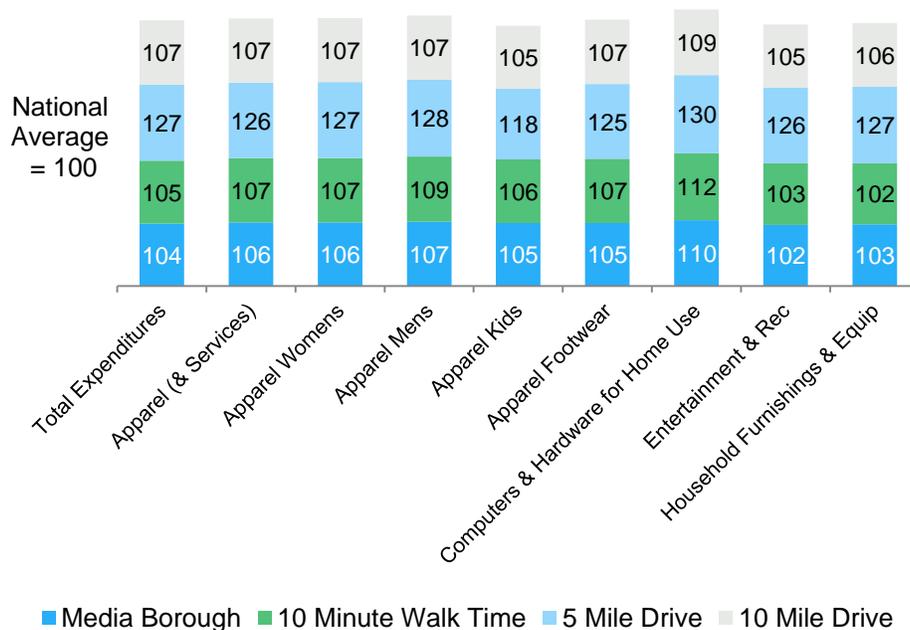
Certain markets reflect a propensity for certain types of retail spending. For example, Philadelphia is considered a food town and often benchmarks 15- 20 points over the national average in food-related categories. The indices are adjusted for local cost differentials. Figure 3.3 and Figure 3.4 display the indices for Media. The borough and the primary trade area (10-minute walk time) perform similarly given that their boundaries closely align. The strongest performance across all categories is in the secondary trade area (five-mile drive). This area includes wealthier communities such as Swarthmore, Upper Providence Township and Middletown Township.

FIGURE 3.3 – SPENDING POTENTIAL INDEX, FOOD SECTOR, BY TRADE AREA



Source: ESRI (2017)

FIGURE 3.4 – SPENDING POTENTIAL INDEX, RETAIL GOODS BY, TRADE AREA



Source: ESRI (2017)



Examining the average monthly spending by household helps to explain what households are spending money on and, coupled with other data, can be used to predict what type of retail uses are likely to be sustainable. The indices provide a benchmark for how a community is performing against the national average. Residents in the secondary trade area have a higher potential spending index than those in the borough and the in primary trade area. However, all the indices are above the national average.

Within the borough and the primary trade area, the average household is spending more on food at home than away from home, which suggests that they are eating at home more than dining out. This balance is common in markets that have a significant portion of families with children, older households, and individuals with limited disposable income. A large cluster of the population in Media is millennials (20-34 years old), a group that is often early in the career, may be carrying school debt, and even starting a family. Another sizeable group is people over 65. Both groups probably have budgets, and are deliberate with spending choices. This information, along with the potential spending indices, informs the recommendations around retail uses and suggestions for the merchandise mix. See Appendix A.1 for average annual spending in Media and each of the trade areas by retail category as well as ESRI Leakage/Surplus Factor by Industry.

REGIONAL COMPETITION

Walkable retail environments are trending today, driven by consumers' preference for sustainable urban living and entertainment-oriented retail. Newer retail development projects (under development and planned) are focused on creating walkable environments that include land uses and components commonly found in downtown areas. Notable projects in the region include the Ellis Preserve, The Promenade at Granite Run and the planned Middletown Commons at the former Franklin Mint site.

The Ellis Preserve is a 218-acre master planned development located near the intersection of Newtown Road and West Chester Pike (Route 3) in the heart of Newtown Square, Pennsylvania. Phase 1 is completely leased. Whole Foods Market is constructing a 52,000-square foot store, slated to open in 2018. Paxos Firepoint Grill is the newly opened centerpiece of The Shoppes at Ellis Preserve. Other tenants include Zoe's Kitchen, Mod Pizza, Pet Valu, ULTA, PA Wine & Spirits, AT&T, FedEx, Chipotle, Franklin Mint Federal Credit Union and First Watch. Plans for Phase 2 of The Shops at Ellis Preserve are now in the design stage of development.



The Promenade at Granite Run is a 1 million plus square foot lifestyle center currently under development about two miles west of Media. This is the former site of the Granite Run Mall at Baltimore Pike and Middletown Road, which is being repurposed to include more entertainment, unenclosed retail, street facing retail, and approximately 400 multifamily rental units (retail anchors including Boscov's and Sears). New inline and street oriented retail stores range in size from 6,000 square feet to 32,000 square feet. Storefronts are approximately 85 percent leased, and retailers are expected to open in late 2017 and the first quarter of 2018.¹¹



Middletown Commons is a development proposed for the former Franklin Mint Property. The project is zoned for 300,000 square feet of office or retail space, 350 residential units, and a 150-room hotel. The project is in the planning stage and the development program under review.

Media has an advantage over these new projects and redeveloped spaces as it is authentic. Regardless of design attributes and investment, it is almost impossible to duplicate the character and diversity of building types and commercial space found in Media today. That walkability and authenticity offers a curb appeal that is part of the allure for residents and those within the region seeking a distinct experience.



Walker's Paradise

Daily errands do not require a car.

More traditional downtown markets in the region also share an audience with Media, including West Chester and Kennett Square. These are not necessarily direct competitors to Media, but are similar types of places and lessons from these communities can apply to Media.

Downtown West Chester, Pennsylvania combines small-town charm with cosmopolitan restaurants, shopping, and cultural attractions. Located 45 minutes from Philadelphia and 25 minutes from Media, West Chester is the county seat of Chester County and was recently recognized as one of the winners of the 2017 Great American Main Street Award. It has

¹¹ "Town center to bring new life at Granite Run Mall" *The Delaware County Daily Times*. Accessed July 3, 2017. <http://www.delcotimes.com/article/DC/20170107/NEWS/170109735>

become a dining and shopping destination, with more than 75 restaurants and dozens of local shops and boutiques, in addition to a few national tenants such as Blink. West Chester's entire downtown district is listed on the National Register of Historic Places.

Historic Kennett Square, located one hour from Philadelphia and 30 minutes from Media, is a designated Main Street, a downtown revitalization model developed by the National Trust for Historic Preservation in 1980. This historic downtown is dotted with a mix of retail, restaurants, breweries and arts and cultural attractions including galleries and live theater and the nearby renowned Longwood Gardens. The community also has a robust farmers market – building off the local mushroom industry. Its diverse land use character and densities make this a charming place to visit. The retail component is limited in scale, compared to Media. While it represents a level of competition, it serves more as a destination leveraging its major attractions such as Longwood Gardens.

COMPARATIVE ANALYSIS

Understanding how Media performs against similar communities in the region is helpful to understand the local retail potential. Comparable communities include Ardmore, Chestnut Hill, Narberth, and West Chester. The median age in Ardmore, Chestnut Hill, Narberth and Media hovers around 40, slightly above the US median of 37.8. West Chester is an outlier, with a median age of 24.2, which is largely attributed to college students. Media has a higher percentage of millennials (age 25 to 34) and adults over 60 years old than the four comparison communities.

Narberth has the highest concentration of families, with families making up 65 percent of households, followed by Ardmore and Chestnut Hill. In Media, 43 percent of households are families, and less than 20 percent of households have children under 18. Media also has the highest percent of people living alone, with 44 percent single person households. The median household income in Media trails behind Chestnut Hill, Narberth and Ardmore, likely due in part to the higher percent of millennials just beginning their professional careers. Nonetheless, 30 percent of Media households have income over \$100,000. Homeownership at 41 percent is well below the national average of 64 percent.¹² If Media continues to attract younger population and households, the retail mix will need to reflect their needs. For more details on the comparative analysis, please reference Appendix A.2.

OPPORTUNITY AND GAP ANALYSIS

A Gap Analysis for the primary, secondary, and tertiary trade areas was conducted as means of understanding what categories of retail and merchandise are underserved. (See Appendix A.1

¹² US Census QUARTERLY RESIDENTIAL VACANCIES AND HOMEOWNERSHIP, SECOND QUARTER 2017



for detailed reports). The analysis measures the gap between supply (retail sales) and demand (based on households in the trade area), and is qualified as surplus and leakage.

When demand in a retail category outweighs the supply of those products and services (sales) there is a gap and a possible opportunity for new retail goods and services in that category. Sometimes the gap is already being met through retail in the regional market, which is known as leakage. In other words, retailers outside the market area are fulfilling local demand for retail goods and products, and sales are "leaking" out of the trade area. Certain tenants and uses have a broad reach that crosses many markets and communities (electronics, sporting goods, auto dealers).

Surplus in an area represents a condition where supply exceeds the area's demand. Retailers are attracting shoppers (sales) from outside the trade area. In Media, the "Food Services & Drinking Places" industry subsector shows sales of \$25 million with demand closer to \$8 million, based on households in the trade area. The strong sales or surplus reflects Media's position as a dining destination and its restaurants' ability to draw customers from the region into the trade area.

TABLE 3.3 COMPARISON OF FOOD SERVICE & RELATED DEMAND GAPS FOR PRIMARY TRADE AREA, IN MILLIONS

Primary Trade Area - 10 Min Walk	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap*
Food Service and Drinking Places	\$8.5	\$25.1	(\$16.6)
Special Food Services	\$0.2	\$0.2	\$0
Drinking Places - Alcoholic Beverages	\$0.5	\$0	\$0.5
Restaurants/Other Eating Places	\$7.8	\$24.8	(\$17.0)

Source: ESRI (2017)

Several categories of goods and services are under supplied in Media's primary and secondary trade areas (see Table 3.4), including clothing and clothing accessories, shoes, furniture, general merchandise, and drinking places.¹³

¹³ The category Drinking places may be a nuance based on how Pennsylvania manages liquor licenses and bars and this demand may actually be folded into Food Services and Drinking Places Category

TABLE 3.4 COMPARATIVE GAP ANALYSIS FOR SELECT GENERAL RETAIL CATEGORIES, IN MILLIONS

10-Min Walk Time	Demand (Retail Potential)	Supply (Retail Sales)	Gap
Furniture Stores	\$1.7	\$0.0	\$1.7
Food & Beverage Stores	\$15.7	\$66.2	(\$50.5)
Grocery Stores	\$14.2	\$59.3	(\$45.0)
Beer, Wine & Liquor Stores	\$0.7	\$4.8	(\$4.1)
Health & Personal Care Stores	\$5.1	\$21.9	(\$16.8)
Clothing & Clothing Accessories Stores	\$4.8	\$4.5	\$0.4
Clothing Stores	\$3.3	\$2.8	\$0.5
Shoe Stores	\$0.7	\$0.0	\$0.7
Jewelry, Luggage & Leather Goods Stores	\$0.9	\$1.6	(\$0.8)
Sporting Goods, Hobby, Book & Music Stores	\$2.4	\$2.2	\$0.3
Book, Periodical & Music Stores	\$0.3	\$0.0	\$0.3
General Merchandise Stores	\$12.6	\$1.6	\$11.0
Florists	\$0.2	\$1.0	(\$0.8)
Office Supplies, Stationery & Gift Stores	\$0.8	\$11.8	(\$11.0)
Food Services & Drinking Places	\$8.8	\$24.5	(\$15.7)
Restaurants/Other Eating Places	\$8.2	\$24.3	(\$16.1)
5-Mile Drive			
Furniture Stores	\$52.9	\$35.3	\$17.6
Food & Beverage Stores	\$520.3	\$627.3	(\$107.0)
Grocery Stores	\$466.8	\$560.8	(\$94.0)
Beer, Wine & Liquor Stores	\$21.4	\$21.1	\$0.3
Health & Personal Care Stores	\$155.4	\$171.9	(\$16.6)
Clothing & Clothing Accessories Stores	\$141.8	\$121.7	\$20.1
Clothing Stores	\$97.0	\$94.8	\$2.2
Shoe Stores	\$19.8	\$12.3	\$7.6
Jewelry, Luggage & Leather Goods Stores	\$24.9	\$14.6	\$10.3
Sporting Goods, Hobby, Book & Music Stores	\$74.7	\$48.6	\$26.2
Book, Periodical & Music Stores	\$10.6	\$8.7	\$1.9
General Merchandise Stores	\$443.6	\$504.5	(\$60.9)
Florists	\$5.8	\$2.7	\$3.1
Office Supplies, Stationery & Gift Stores	\$26.3	\$34.8	(\$8.5)
Food Services & Drinking Places	\$280.9	\$239.9	\$41.0
Restaurants/Other Eating Places	\$257.8	\$224.4	\$33.3

Source: ESRI (2017)

The gap analysis is an indicator of goods and services that are likely to be sustainable because consumers are having to leave the market to get them. This information, when considered along with local buying power, consumer and national trends, and competition, provides a starting



point for retail attraction for Media. This information is not a predictor for which specific businesses might succeed or fail. Rather it is a starting point for the type of businesses that might be strong prospects for downtown.

APPLYING THE DATA TO DOWNTOWN MEDIA: MERCHANDISING OPPORTUNITIES

All the data compiled can be used as an indicator of goods and services that are likely to be economically sustainable because the data suggest that people are leaving the area to get them. Desire for these services was confirmed through the stakeholder meetings and the survey. Additional consideration is given to the nuances of the market, including walkability, age of the population, consumer buying power and patterns as well as national trends and competitive retail in the region.

Based on the data examined for the individual trade areas and the borough, several categories are underserved and are outlined below:

- Apparel (women's, kids, consignment)
- Shoes and footwear (women's, men's, kids)
- Furniture (new and used)
- General merchandise (basic goods found in a department store)
- Lawn & garden (small plant or garden store)
- Specialty foods
- Books, music and limited electronics
- Coffee shop, café, drinking places



In addition to the categories above, the following uses are recommended based on the complementary nature and synergistic nature of co-tenancy with existing retail, Media's place as the county seat, connectivity and transit access.

- Professional Service firms (side street, second levels)
- Design/planning firms (architecture, interior)
- Law and related services
- Personal and business services (finance, real estate, insurance)
- Business services (printing, design, mail)
- Art and cultural uses (studio space, galleries, art school)

3.3 NATIONAL TRENDS AND BEST PRACTICES

We identified national trends in retail real estate and examined and evaluated best practices of tools and tactics undertaken to promote downtowns related to retail recruitment across the country. The following are those relevant for Media.

National Trends Overview

Industry Trends

- Store sizes are shrinking. The average size of a fashion store today is between 1,500 – 2,000 square feet. The average size of a “fashion boutique” is 1,000 running as small as 500 square feet.
- Lease terms are shrinking. Standard retail leases in the past two decades were 10 years, plus 5 and 5 for renewals. Landlords are now open to shorter-terms even as low as three years.
- Shops within Shops are increasingly common; Small and independent stores are increasingly sharing space (cooperative leases, -co-tenancy).
- Showrooming is rising: retailers feature their products in smaller spaces where the customer can see it, buy it, and have it delivered within 24 hours.
- Online spending is increasing, but still less than 10 percent of all sales.
- Nearly 50 percent of in-store retail sales are influenced online. 50 percent of consumers expect to buy online and pick up in-store.
- Omni-channel marketing is a must for retailers. Integrated selling platforms have become the norm regardless of store size, from web-based sales to Instagram promotions. Yet, only 28 percent of U.S. small businesses are selling their products online.
- Integration of products and experience is becoming seamless. A coffee shop or bar combined with a bookstore or apparel, athletic wear and classes, restaurants and movies even special events inside stores.
- Pop-up Shops These short-term temporary stores are being used to promote new brands and products and introduce young businesses to a market. Communities are integrating pop-ups to activate vacant storefronts.

Consumer Trends

- The curated experience is imperative. Consumers today demand curated and personalized offerings which leads to increased brand relevancy.
- Comparison-shopping and sales between independent businesses and chains is about "overall value, uniqueness, not just price".
- Loyalty programs are becoming commonplace even among independent brands and often co-branded and this influences where consumers spend their money.
- Experience and convenience are paramount and often trump price today.
- Dining and entertainment is more than one half of retail spending for individual and household budgets for millennial populations.
- Apparel sales are trending toward casual and trendier and less costly items and away from "professional attire". Suits still have a role in certain professions but far less than years past.
- Seventy-one percent of consumers want access to in-store inventory when shopping online, 85 percent still prefer an instore experience, even if they buy online.
- Cash usage for retail purchases is falling. Twenty-one percent of young Americans -- aged 23-34 -- say they make all or most of their purchases with cash, down from the 39 percent who say they used cash to that extent five years ago.**
- Preferred payment types vary by age, too. People ages 25 to 44 preferred credit cards, while the 18-24 crowd and the 45-54 crowd prefer debit. Forty eight percent of smartphone users said they made a purchase from their device Qtr. 2 2016.
- There is an increased focus on locally made, sourced and produced. A decision to buy locally is typically about a lifestyle choice that reflects commitment to the community, access and even affordability and driving entrepreneurial retail concept

**TSYS 2016 U.S. Consumer Payment Study



BEST PRACTICES OVERVIEW

National best practices provide insight into the ways that commercial corridors can improve. Several ideas relevant and useful for Media include:

- A dedicated retail recruiter whose sole job is to focus on retail attraction
- An inventory of available sites
- Easily accessible market and demographic data
- Animate vacant storefronts
- A buy local campaign
- Subsidies for startups
- Funding for retail recruitment and retention
- Proactive marketing and outreach
- Participation in retail industry associations and events
- Cultivate and nurture entrepreneurial businesses, and
- Pop-up and temporary shops

Please see Appendix A.3 for a detailed description of these practices and how they can be applied to Media.

3.4 RETAIL RECOMMENDATIONS

REALIGN THE FUNCTION AND FOCUS OF THE MEDIA BUSINESS AUTHORITY

The Media Business Authority (MBA) has made great strides since inception and has proven to be a valuable resource to promote downtown Media. Market shifts and consumer trends are impacting retail and downtown environments nationwide. To stay current many downtown organizations are adjusting to be more proactive about business recruitment and attentive to the fundamentals of what makes a vibrant downtown. Recommendations regarding the MBA include:

- Change the name of the Media Business Authority to the Media Business Alliance – which is more inclusive and would help to separate the MBA from the appearance of being part of the local government.
- Include the retailers in event marketing activities and associated marketing narrative in ads, collateral and on the calendars.
- Bolster efforts around retail attraction and recruitment and retention including a focus on entrepreneurs, locally made and sourced goods.
- Reposition the function of the organization and role of leadership. The MBA needs to function more like a traditional Main Street Group or Business Improvement District. In this vein, the MBA would be the lead steward and advocate for downtown. Specifically, this should include:

- Expansion of the director’s role to thought leadership and long-term planning, overall marketing, business investment, recruitment and retention.
 - Have the director serve as a liaison between the Borough Council and the business community.
 - Oversight of the plan implementation and any other downtown oriented policy and programmatic changes.
- Develop an executive board that includes representation from the borough, the business community (lawyer, developer, lender) the retail industry and the restaurants.
 - Pursue funding, including local foundation and public funding, to support marketing, retail recruitment, and attraction as well as public improvements. This might include money from the State, federal grants (CDBG, HUD), and foundations that support infrastructure, public space and small business and retail investments (William Penn Foundation, Kaiser, Kresge).
 - As part of this restructuring, the MBA should hire someone (or two part-time people) whose sole responsibility is to manage events and maintain an active social media presence.
 - Hire someone to focus on retail attraction and retention. This too could be a part-time person. The individual should have experience with business attraction or in retail leasing. Ideally, this individual also has relationships with retailers and or retail representatives that they can leverage as part of this effort.

RELOCATE THE MBA OUT OF BOROUGH HALL

A location within downtown will allow more accessibility for the business owners, and help to eliminate any misperceptions of the organization as a government entity. Ideally, their office should be located on State Street or a nearby side street where there may be obsolete office or an inadequate retail storefront space. The office could also function as a welcome center with information on downtown Media. Explore whether any local stakeholders have space they might make available at a discounted rate.

EXPAND MBA MARKETING FOCUS BEYOND EVENTS

Today much of the MBA’s marketing focus is around events and programming, with ads and marketing materials limited to the specific events and participating businesses and organizations. There are other cost-effective marketing efforts that could be undertaken to raise awareness about downtown and its retail assets.

- Embrace PR including editorial coverage in local publications and national and industry-oriented ones. Pursue stories on individual retailers and products available in the market as well as the experience of Media.



- Seek exposure intended to capture a larger audience with outlets such as Philly.com. Expand outreach to local media – print and online. While events are marketed to local press, consider sharing information about events, activities, promotions and even business news with more regional press. Possible examples include Philadelphia Magazine (website has an event calendar), Where Philadelphia (Escape the City section), more targeted publications as Metro Kids, Grid, and more.
- Pursue coverage/post coverage on Yelp, Trip Advisor and other similar platforms about Media retailers; this can be done by the retailers themselves, staff, customers etc.
- Place emphasis on the overall retail experience, history of downtown, placemaking, and assets such as walkability, connectivity (Trolley, regional rail), arts and creative uses.
- Leverage retail and entertainment anchors, such as the Media Theater and Trader Joe's by including them in marketing messaging or working with them to provide information on downtown Media in their vestibules or entryways.

FINE-TUNE THE PURPOSE FOR AND THE PROCESS OF COLLECTING THE MERCANTILE TAX

There is some confusion among Media business owners over who is required to pay this tax and how it is (and if it is) collected. It is important for the borough and the MBA to reinforce why the tax is collected and how it benefits downtown.

- MBA should launch an information campaign explaining what the Mercantile Tax is, why it is important and who is required to pay it.
- An MBA Welcome Committee should visit each new business in the borough providing a packet of basic information about the borough and borough requirements for businesses, MBA membership and the Mercantile Tax.
- MBA should launch a campaign to welcome home-based businesses into their fold, conveying information about benefits of MBA membership and borough requirements for businesses, making sure to mention the Mercantile Tax.
- MBA should emphasize in its social media and other communications that all retail and wholesale businesses in Media are automatically members. There is no membership fee.
- The borough should work with the tax collection entity to build a system that ensures the Mercantile Tax is consistently paid each year by all businesses required to pay it.
- Report on the tax collected year over year – even use it as a benchmark for progress.
- Direct all Mercantile Tax revenue to the MBA.

UNDERTAKE A PHYSICAL STOREFRONT CONDITION AUDIT

Some of the storefronts and buildings are weathered, even tired. The façade and entrance are the most important components of a storefront. Their visual and street appeal can make or break a business.



- Visually review and assess the storefronts, preferably by an architect or properly trained planner.
- Provide constructive feedback to business owners (e.g., excessive and crooked window signs, lackluster store fronts and window displays, old merchandise).
- Reinvigorate marketing of the borough’s Façade Loan Program as a means to improve visual and street appeal and address ongoing maintenance.
- Identify funding tools that may be available to augment improvements.
- Enhance the illumination of storefronts and within display windows. This would have a dramatic impact on the appeal of State Street and adjacent side streets at night, even when businesses are closed. Many small businesses install LED or spot lights to brighten up or even animate their stores.

ENFORCE BUILDING CODES TO ADDRESS ACCESS AND PHYSICAL ELEMENTS

- Address ADA issues.
- Enforce the sign code and eliminate paper signs.
- Maintain facades, address peeling paint and safety hazards including deteriorating entryways.

MAINTAIN CONSISTENT STORE HOURS

Encourage businesses to maintain hours consistent to what is advertised or posted on their entryway.

- Nothing is more frustrating than heading to a business that advertises they are open only to find them closed.
- Build consensus for extended hours on days when there are dedicated events. (“Friday Nights in Media” advertises 5 to 11 PM, but many of the stores are not open past 5 PM).
- Create a calendar link that lists those businesses that are indeed open during evening hours.
- Encourage merchants to advertise their hours of operation on their websites.

EMBRACE THE “MAIN STREET” FUNDAMENTALS

The Main Street Approach, which evolved from the National Trust for Historic Preservation, is centered on transformation strategies. A Transformation Strategy articulates a focused, deliberate path to revitalizing or strengthening a downtown or commercial district’s economy. Many small downtowns embrace the fundamentals. Downtowns that become certified are often eligible for funding.

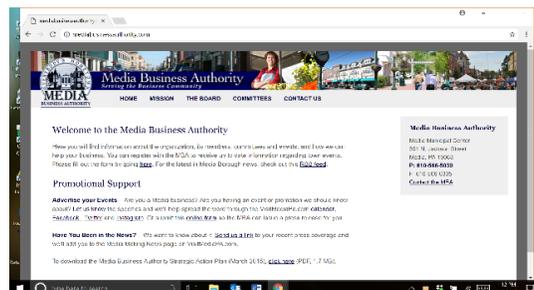




- Define and adopt those elements that make sense for downtown Media.
- Consider pursuing designation as a Pennsylvania Main Street – it enables Media to get additional funding, and often results in direct and indirect marketing.
- People (and retailers) identify and even align with “main street” organizations as they bring a certain level of confidence along with the designation.

ADOPT A PROACTIVE APPROACH TO MARKETING

Downtown Media has achieved a strong market presence. In today's competitive environment, pro-active marketing is essential to maintain downtown Media's presence as a destination in the region and to ensure it continues to grow. The following tactics and tools have proven successful in other small downtowns and for promoting (and recruiting) retail assets.



- Improve and update the website for the MBA and the page on the borough website for shopping and dining. The content of the MBA site appears to be concentrated toward members of the MBA and local businesses rather than at audiences that are looking at Media. Shift the focus from inward communication to one that is externally oriented and promotes the community.
- Optimize the website and language to assure maximum exposure. Make it easy for potential customers exploring the website and seeking information about Media businesses. Link individual businesses' websites within the borough's website.
- Optimize, enhance and change the narrative on the calendar for events, especially those that are repetitive (Dining Under the Stars, Friday Nights). Highlight individual businesses and/or activities on different weeks (maybe for a fee). Optimize key language so it gets picked up by outside search engines and media.
- Bolster the use of online sales and in-store pickups (either through the MBA or a campaign by the MBA – encourage businesses to participate).
- Reach out to local print and online media as well as those outlets that reach a regional audience including Philly.com and Philadelphia Magazine, etc. Pursue stories on individual retailers or products available in the market. Secure listings about Media in relevant columns.
- Leverage local retail and entertainment anchors such as the Media Theater and Trader Joe's. Include these sites in promotional marketing and messaging. Cultivate them as partners in marketing. Ask them to provide space for information on downtown Media in their entryways.
- Participate with and grow Small Business Saturday, which has a strong national brand and following. This strategy aligns with expanding and strengthening the "shop local" campaign.

Kenny's Flower Shop

110 W State Street
Media, PA 19063
610-566-6162

Website: <http://www.kennysflowers-media-pa.com>

Friday Nights in Media

5:00 PM to 11:00 PM

Friday Nights in Media - Where Your Weekend Begins! Stroll through the charming streets of Media, shop for unique gifts or something fun just for you, indulge your taste buds with our variety of award-winning restaurants, have a date night with live music or Broadway theater, luxuriate with a specialty salon service, watch your favorite sports teams in our local pubs, or meet a friend to catch up over a quiet cup of coffee. Media has everything you need to jump start your weekend!

10th Annual Dining Under the Stars in Downtown Media

5:00 PM to 11:00 PM

STROLL, SHOP, DINE: On Wednesday evenings, State Street in Media, PA is closed to traffic to provide ample space for outdoor dining or strolling the street to visit the retail shops. Live entertainment rounds off the experience!



- Pursue coverage/post coverage about Media retailers on sites such as Yelp, Trip Advisor and other similar platforms that provide consumer and visitor information. This can be done by the retailers themselves, staff, customers etc.

ADOPT A SOCIAL MEDIA POLICY

Research has demonstrated that audiences of all ages are using social media tools around retail and shopping activities. A basic social media strategy and platform could help to elevate the businesses' presence to broader audiences.

- Create a hashtag just for downtown – encourage merchants, restaurants, and customers to use this.
- Bolster “gramming” – Instagram and other social imagery tools – encourage local and elected officials to use this as well as part of the promotional programming.
- Ask attendees or store customers to like either specific retailers in Media or Downtown Media Retail on appropriate social media platforms.
- Establish a Twitter account and use this to market Media, businesses, events and in general to attract attention to downtown.

DEVELOP AND TRACK METRICS TO SUPPORT MARKETING AND BUSINESS ATTRACTION

Fact-based marketing works, especially when data points are those that resonate with target audiences, businesses and consumers. Metrics are a straightforward way to track progress as well.

- Metrics such as Walk Score and Transit Score can be used to sell Media's asset base. Other examples include connectivity, Livability Ranking, ridership numbers, pedestrian traffic, etc.
- Promote these metrics to websites and organizations that host rankings of communities locally and nationally - it is a means of getting on “best of” types of lists. They also resonate well with consumers and businesses, providing an easy means of comparison.
- Business attraction and retention metrics are also important, such as number of site inquiries, number of site visits, rent rate changes, tenant retention (years, occupancy), vacancy rates, even crime rates.

CONSIDER A PROMOTIONAL EVENT THAT CORRELATES WITH DINING AND SPECIAL EVENTS

- Explore special promotional days/hours where those attending Dining Under the Stars and the America's Music Festival Series can enjoy retail offerings, such as 10 percent off from 5-6 PM on Wednesday nights in the summer.



- Cross market with restaurants (e.g., the bakery brings little cookies to that antique store). This could be done with other types of food as well.
- Market locally made and designed goods that are available in the market relevant to special events.

CREATE A TESTIMONIAL CAMPAIGN

More and more communities are using testimonials to market businesses, neighborhoods, and even for business recruitment. Peer to peer marketing is very powerful – whether consumer to consumer or business to business.

- Use the voice of customers to extol their assets in downtown Media, including what they like and why they come.
- Engage a few proprietors to share why they selected Media.
- Market and distribute these stories via social media and on the MBA and borough's website.

LAUNCH A RETAIL BUSINESS RECRUITMENT PLAN

Downtown Media, with its idyllic setting and overall affordability and accessibility make it a fantastic location for business. It is further strengthened as its destination as the County Seat – which lends credibility for businesses. These points need to be articulated and promoted to make business attraction and recruitment a priority. A Retail Business Recruitment Plan should include a mix of the following items: developing the human capital infrastructure dedicated to retail attraction, creating essential recruitment tools, and focusing on select entrepreneurial businesses. For further detail, please see Appendix A.4, which lays out the guiding principles and specific action steps for the recruitment plan.

4.0 EVERYBODY'S HOMETOWN: LEVERAGING MAJOR ASSETS

4.1 PLACEMAKING OVERVIEW

Media Borough is a traditional town of the pre/early-automobile era, comprising a tight grid of relatively narrow streets. Short blocks, narrow crosswalks, and a fine-grain architecture, and accessibility of daily activities render the town eminently walkable, especially given that nowhere within borough limits is further than a 10-15 minute walk from the intersection of State and Jackson Streets. Media has public parks and playgrounds, the iconic outdoor Plum Street, as well as intimate sidewalks in the business corridor and a number of benches strategically placed along State Street. These amenities are important to residents, workers, and visitors to the borough. In fact, our survey results indicated that over 70 percent of respondents felt that parks, outdoor activities, and outdoor spaces to rest are important amenities for their lifestyle

State Street is the borough's economic and cultural core, but unlike many comparable towns, it is not a state highway with the thru-traffic responsibilities of that designation. Instead, two other major roads serve this purpose: Baltimore Avenue being two blocks to its south and the Route 1 Bypass just north of the borough. State Street does however, boast unique regional access in the form of SEPTA's Route 101 trolley, which runs two-way on a single track in the borough, transitioning to a separated right-of-way east of Providence Road.

Infrastructure and regional transportation may set the stage, but people make places. In Media, placemaking begins with people in the street every day – walking to school or work, shopping, getting a bite to eat, hopping on the trolley, stopping at the drycleaner, or just visiting friends.

However, not only do people activate streets through daily life, but they come together to make them more interesting places by further improving existing public space. After community interest to update the Plum Street Mall heightened the presence of public art there, the borough has undertaken a bold project to redesign the iconic space. Similarly, Veteran's square is being updated to include green infrastructure and new gathering spaces.

Finally, placemaking is achieved by supplementing daily life with high quality public events and programmed activities. In many ways, State Street is the most intuitive location to encourage further placemaking and events as so much of the action already occurs there. This focus would also complement and support the retail presence. State Street hosts almost all of the largest events in Media each year including:

- Dining Under the Stars, an outdoor dining event each Wednesday throughout the summer,
- “Super Sunday” street festival in the spring and fall,
- The America's Music Festival Series,
- The Media Art Exhibition & Craft Fair,
- The Media Film Festival,
- The Downtown Car Show, and



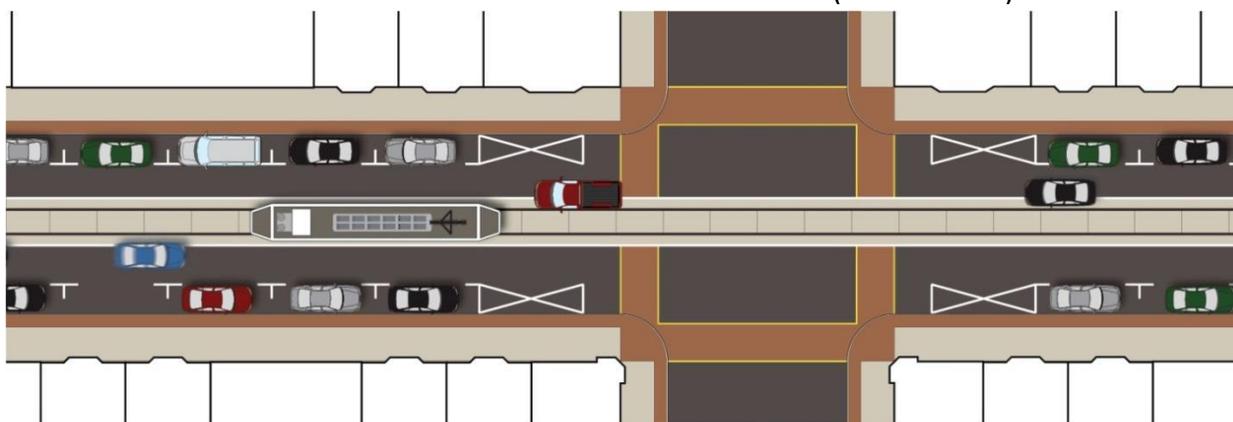
- Numerous holiday parades throughout the year.

However, it is important for borough leadership to weigh the benefits of investing in events with the other opportunities for growth and development. The optimal approach is thus to establish a set of core values for Media Borough, assess the tradeoffs between various actions, and then implement those items that best support the borough's ultimate goals. In this vein, the project team has developed a series of recommendations that will advance Media's vision to enhance "sense of place" without necessarily adding new events.

4.2 INFRASTRUCTURE OVERVIEW

State Street accommodates a remarkable mix of transportation uses in a tight right of way. Its 6.5-foot parking lanes, 8.5-foot travel lanes, and 9-foot two-way center-running trolley track defy conventional traffic engineering, yet come together to support a vibrant retail street. When SEPTA modernizes its trolley fleet in the next decade, State Street will need to be creatively reorganized to come into compliance with the Americans with Disabilities Act. This poses a unique challenge and opportunity.

FIGURE 4.1 – DIAGRAM OF THE LAYOUT OF STATE STREET (CREDIT: SEPTA)



SEPTA's regional rail station in Media is just south of the borough's border, providing Regional Rail access to Philadelphia and, in the future, Wawa and potentially West Chester. The station serves 580 daily boardings. Of these passengers, 59 percent walk to the station, 39 percent drive, 1 percent bike, and 1 percent take the bus there. Of the 228 passengers who drive to the station, only 2 percent come from within a half mile of the station, suggesting that the vast majority of people parking at the station live outside the borough.

Presently, Media is served by two SEPTA bus routes: the 110 and the 118. Route 110 runs from Penn State Brandywine Campus and the Springfield Mall to 69th Street Transportation Center by way of Baltimore Avenue through Media, carrying 2,275 passengers per weekday (8th among 45

suburban bus routes). Route 118 runs from Newtown Square to Chester Transportation Center by way of Jackson Street, Baltimore Avenue, and Radnor Street in Media, carrying 599 passengers per weekday (29th among 45 suburban bus routes). Both routes run relatively infrequently with 30-60 minute headways and no Sunday service on Route 118. Such service is generally a last resort for those with few other options.

Finally, motor traffic in the borough appears to be decreasing. Based on traffic counts conducted by DVRPC, measured segments of roadway in the borough have experienced declines in volume from their 15-year peak to their most recent measurement. Motor volume reductions range from 12 percent to 36 percent. This is especially interesting in the context of the economic growth Media has witnessed in recent years (which would normally be expected to be accompanied by traffic increases), and suggest that transportation behavior may be shifting, either by becoming more evenly distributed or including more non-driving alternatives.

4.3 FRAMEWORK FOR PLACEMAKING AND TRANSPORTATION RECOMMENDATIONS

In many communities, placemaking preferences get inadvertently undermined by other transportation priorities. For example, despite a desire to be “walkable,” vehicular level of service is prioritized, and as a result, sidewalks get narrowed to or bike lanes get eliminated to accommodate vehicular turning lanes. Therefore, to advance Media’s stated objectives, aligning transportation assets with placemaking preferences is critical to shaping growth and minimizing unintended negative consequences; this report treats them as an integrated strategy. Media’s walkability is, overwhelmingly, considered to be one of its greatest assets, which should be the basis for its continued economic development and further enhanced.

4.4 STATE STREET: MEDIA’S “STREET FOR PEOPLE” RECOMMENDATIONS

State Street is the heart of “Everybody’s Hometown,” beloved for its social nature, walkability, physical character, and attractions. Any changes to the street should always be incrementally improving these features. Changes that compromise these fundamental characteristics should be reconsidered. Of the following three recommendations for State Street, the first two are relatively modest modifications to the way the street operates, with major impact on experience and perception.

PARKLET PROGRAM

Begin a “parklet program” to add public seating to narrow sidewalks. Parklets replace one or more curbside parking spaces (parking, more broadly, is addressed in section 4.9) with social spaces that may include seating or other activities.



Parklets are often implemented using temporary or seasonal materials, with the option to make them permanent in the future. There are even local designers and manufacturers specializing in their design. Parklets, about the width of a parked car, are often built with elements separating them from moving traffic.

There are many models parklet programs, but Philadelphia's, for example, creates opportunity for community groups, restaurants or retailers to build and insure parklets at little to no municipal cost. While they may provide additional dining space, they must remain accessible to the public.



PARKLET IN UNIVERSITY CITY – CAFÉ SEATING AND BICYCLE PARKING

A Media parklet program could be a joint initiative between the MBA and the Media Arts Council, both to provide more space for busy locations, or to create interest in fledgling ones.

REMOVE TRAFFIC SIGNALS

Traffic signals are tools to maximize vehicular throughput by controlling movements of all roadway users, including pedestrians. From villages in the Netherlands to the streets of Pittsburgh, however, local leaders are learning that by removing rigid roadway hierarchies, instead relying on social cues, and giving pedestrians more free reign over the road, cities and towns can become more social and less stressful, without negative traffic consequences.

Unlike the “main streets” of many similar towns like Bryn Mawr, State Street is not a state highway or even a throughway at all, and carries relatively little through traffic. In many ways, this makes the central section of it an ideal candidate to become a less regulated “shared street,” resulting in a slower, but more fluid movement of traffic through the heart of the borough. At first, such a traffic-calming transformation may involve replacing costly signals with stops signs, but as State Street is reconstructed for Trolley Modernization, design treatments may be applied that forgo the need for any stop control at all. A pilot program to test converting the traffic signals on State Street at Orange, Olive, Jackson, and Monroe to 4-way flashing red would allow the borough to introduce the idea and monitor motorist and pedestrian behavior and impressions.



SHARED SPACE INTERSECTION IN DRACHTEN, NL

STATE-BALTIMORE CONNECTOR: A CIVIC ART PROJECT

Today, State Street peters out west of the Orange Street trolley terminus and while Glen Providence Park is a lovely asset with quality programming, it is not well integrated into the urban fabric, despite its proximity to downtown.

Especially with significant development underway in the west end, the time is right to improve the connectivity and presence of these assets. Such a connectivity project, much like the ongoing Plum Street initiative, should reconceive the street not only as infrastructure, but civic art. Specifically, this project could:

- Extend pedestrian scale street lights west on State Street to Baltimore Avenue.
- Consider narrowing the northern crosswalks of the intersection with West Street, which is presently especially wide because of a sweeping curve.
- Complete streetscape improvements from Baltimore Avenue to West Street, establishing sidewalks and green infrastructure on both sides of the street.
- Redesign the threshold to Glen Providence Park at State Street to create a proper sense of arrival, including the possibilities of lighting, public art, seating, and gardens.

4.5 TROLLEY RECOMMENDATIONS

Trolley service is an unusual asset in suburban locations across the country. The following recommendations provide guidance on how to enhance this asset both in the near term, and in the longer term as SEPTA undertakes its trolley modernization program.

PROMOTE THE TROLLEY AND MARKET-FRANKFORD LINE

The borough should work to promote the trolley and Market-Frankford Line as more frequent and direct service to Philadelphia than regional rail. While the railroad may be a shorter ride, the trolley-to-subway is convenient to State Street, less expensive to ride, connects to more sections of Philadelphia (like West Philadelphia, Old City, and Fishtown), and most importantly, runs more frequently, with the possibility of even greater frequency in the future. Any promotion should be in concert with relevant retail marketing, branding and messaging that is coordinated by the MBA. For example, advertisements on the Market-Frankford subway for visiting Media shops and restaurants recommend taking the subway to 69th Street and hopping on the trolley.

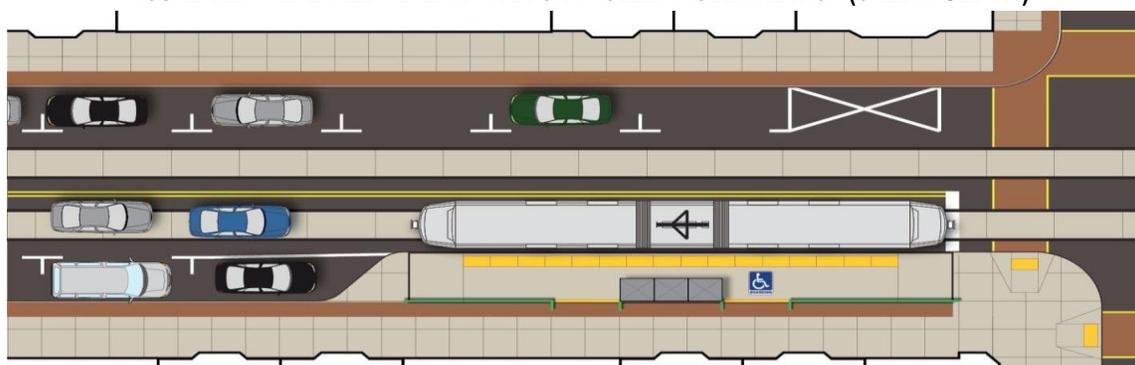
MODERNIZE TROLLEY INFRASTRUCTURE

SEPTA will be modernizing trolley infrastructure across the region over the coming decade, in order to make the service accessible to people with disabilities, improve the experience and ease of boarding for the general population, and reduce boarding-related delay. In order to achieve these federally mandated improvements, changes will need to be made to infrastructure



and operations on State Street. SEPTA and the DVRPC have developed a series of alternatives in the Modern Trolley Station Design Guide on how to configure the limited right-of-way, each with tradeoffs between cost, parking, construction interference, and two-way operation. After considering these alternatives, the double-track alternative that creates more comfortable boarding and alighting areas at dedicated stations is the preferred concept. This alternative minimizes parking reductions, is less capital and maintenance intensive, and creates the opportunity for more frequent service than is possible under the current single-track configuration. Additional stakeholder and community outreach, as well as technical design work, will be necessary to finalize the preferred Americans with Disabilities Act compliant service improvements. We believe the double track alternative to be the best option for advancing the borough's interests moving forward.

FIGURE 4.2: PREFERRED ALTERNATIVE FOR TROLLEY MODERNIZATION (CREDIT: SEPTA)



CONSIDER MODIFICATIONS TO EVENTS ON STATE STREET

After significant investment, it may become more difficult to justify closing State Street to trolley traffic with the same frequency as today, and it may become important to consider modifying events like Dining Under the Stars. One option for this event would be to utilize all curbside spaces for dining during the event, maintain trolley service, but prohibit all other motorized traffic. The two center lanes of the street, much like many cities in Europe, could be shared by pedestrians, bicyclists and trolleys during the event. Supplemental dining space could be added by closing off the first block of streets intersecting with State, such as Olive, Orange, or especially an updated Veterans Square.

REDUCE THE NUMBER OF TROLLEY STOP LOCATIONS

Best practices in transit recommend stations less frequently than every block. This is especially so when stations are expected to be 130-foot long (about five curbside parking spaces). Eliminating stops will save on construction costs, minimize parking reductions, and ultimately allow for faster service for passengers. Stops should be selected not only based on their

current ridership or concerns from immediate neighbors, but how the series of stops is spaced and contributes to an intuitive system. Our Initial recommendations include stops at Providence Road, Edgemont Street, Church/Jackson Streets, Veterans Square, and possibly Orange/Lemon Streets, depending on how the turnaround is designed.

INTEGRATE PLUM STREET MALL AND TROLLEY INTO SEAMLESS DESIGN

Plum Street has an offset intersection with State Street, resulting in an interesting design challenge to unify north and south sections of the mall across State Street. Initial Plum Street mall redesign concepts did not consider the implications of two tracks in the street, and featured narrow (about 4-foot) bumpouts with two travel lanes and a dedicated trolley lane for the 100 feet of State Street. However, assuming a double-track trolley modernization, a dedicated lane for a two-way trolley is no longer necessary in the Plum Street design. Therefore, and at a minimum, a seamless design of Plum Street and trolley modernization would involve expanding the planned bumpouts to the whole width of the parking lanes (about 8 feet), and materials in the street that unify both sides of the mall.

However, by combining the Plum Street Mall and Trolley Modernization projects with the concept of “shared space” outlined in Section 4.4, the opportunity also exists to transform this central block of State Street into a curbsless plaza, dominated by pedestrians, through which trolleys pass, and motorists proceed cautiously as guests. Such a bold change would require careful collaboration with SEPTA and a creative design team, but have the opportunity to multiply the impact of Plum Street and trolley modernization beyond the possibility of each project alone.



MARKET SQUARE IN PITTSBURGH

TROLLEY STATION DESIGN: A CIVIC ART PROJECT

Sometimes, public art is a free-standing, independent installation. Another opportunity, however, is to engage artists to design otherwise ordinary pieces of repetitive public infrastructure, like transit stations. This requires both artist creativity, and an understanding of the functionality of infrastructure and the needs of its users. SEPTA is preparing to overhaul its trolley operation on State Street, which will include reconstruction of several intersections and creation of 130-foot stations with shelters on them. Artists could be engaged to add Media's creative personality to the design of new trolley stations and shelters. The Media Arts Council may be tasked to manage a collaborative public art and station design process with SEPTA and local artists.

Each of these stations is a "gateway" that informs Media's sense of place and brand. The recommended artist-driven design should be in sync with the palette developed in the recently adopted wayfinding plan, and be part of a larger initiative to develop gateways at other key entry points, such as Five Points and the train station.

INCREASE SERVICE FREQUENCY

People ride transit when it is convenient, as confirmed by this study's public survey, and what transit lacks in flexibility, it makes up for with reliability. One of the greatest factors in transit convenience and reliability is the frequency of service and, in fact, service frequency is one of the best predictors of ridership of all modes of transit. Current frequency on the trolley in Media is limited by the operational realities of running two-way trolley traffic on a single track. The double-tracking proposed through Modernization will provide the necessary infrastructure capacity to increase frequency. Advocate for increasing service frequency to no more than 10-minute headways to serve existing riders better, attract new riders to the service, and get the most return on SEPTA's substantial capital investment in modernization.

DEVELOP METRICS TO ASSESS FUTURE EXPANSION

Media officials have discussed the potential benefits of jitneys linking to major destinations, including Granite Run Mall. These benefits include reduced congestion, connections to employers beyond the borough, and attraction of visitors to media who might not otherwise come. Beyond a separate jitney service, however, these goals could be met by extending Media's existing trolley service to the West End, Granite Run, and Riddle Hospital. Unlike a separate, rubber-wheeled visitor jitney, a trolley extension has the potential to impact development patterns. Here, that may mean infill housing development at places like Granite Run, taking some pressure off Media and more rural sections of Middletown Township.

While trolley modernization is an overhaul of existing infrastructure and may seem relatively manageable, it is a major undertaking. Therefore it must be approached very methodically, and this study is not prepared to recommend it. However, that doesn't mean that service can or should never be extended. The first step should be to develop a set of agreed-upon



transportation and economic development metrics and thresholds that SEPTA, the County, and the borough, and neighboring townships can use to determine the circumstances in which expansion would be appropriate and worth the capital and operating costs. Media may engage Middletown and Upper Providence Townships to discuss collaborative land-use planning.

4.6 BICYCLING RECOMMENDATIONS

Our survey found that while 46 percent of people think quality of life would improve with more bicycling (only 11 percent said it would get worse), bicycling is relatively seldom used and considered relatively inconvenient with most people (64 percent) attributing lack of safety (real or perceived). These results are consistent with national research that finds that vast swaths of the population that would be interested in bicycling choose not to because of concerns about safety and comfort. However, limited rights of way mean that safe cycling space comes with tradeoffs, which can be difficult in any community, regardless of stated preferences. The recently adopted Media Bike Plan is an excellent start.

IMPLEMENT SHARROWS

Allocate the \$20,000 identified in the adopted bicycle plan to immediately implement the sharrows recommended in the plan. Consider spacing them more frequently than every 250 feet on Jackson Street.

ADVANCE PLANNING FOR MEDIA-SMEDLEY CONNECTOR

This project, identified in the Media Bike Plan, would connect to regional trails and Glen Providence Park via 3rd Street and, presumably, the dam and bridge currently being reconstructed. It would provide a boost to recreation access and overall quality of life. However, the cartway on 3rd Street is a relatively narrow 26 feet wide, which would not readily accommodate a multi-use trail on a one-way street. Planning for the connector should be advanced with an alternatives analysis considering a variety of configurations, which could include utilization of 4th Street.

JACKSON STREET BIKEWAY

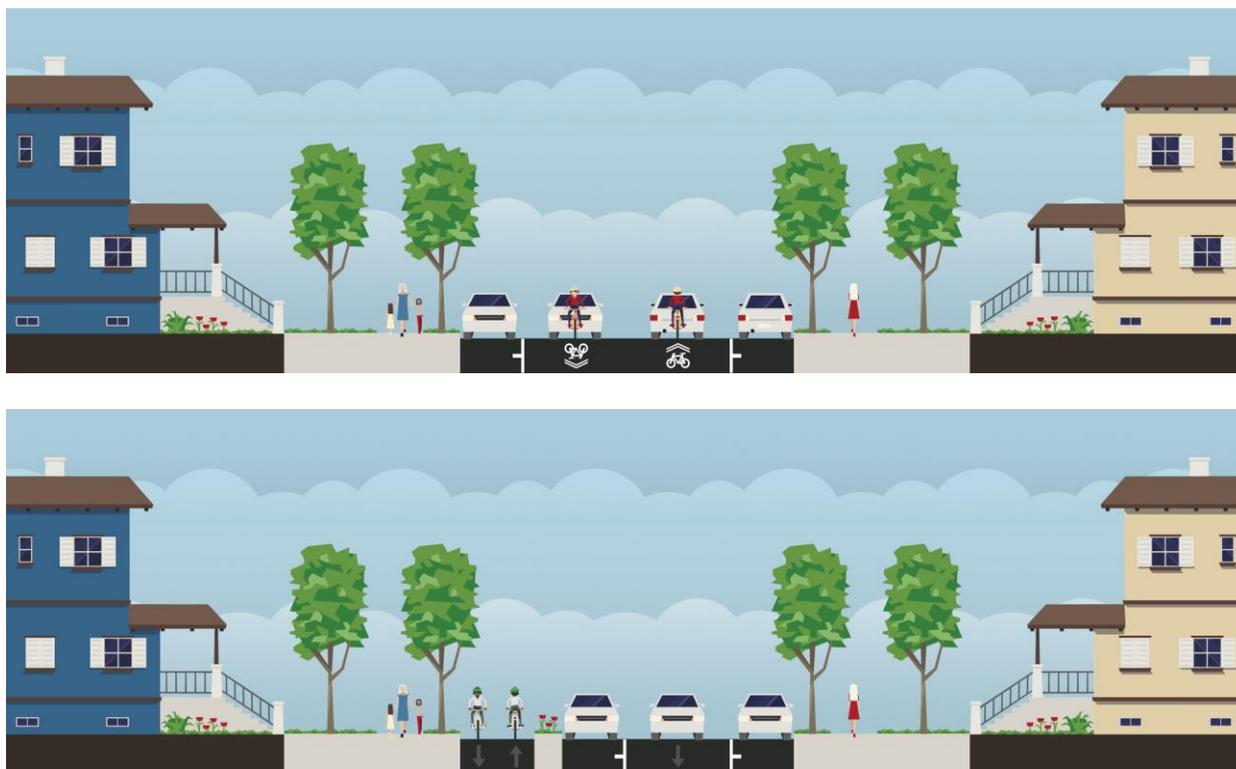
The bike plan found Jackson Street to be among the most highly desired bike routes. However, 2016 DVRPC bicycle counts found very few existing cyclists. Just as there were few motorists crossing the Delaware River before the construction of the Benjamin Franklin Bridge, most people will not bicycle on streets until they have infrastructure that makes them feel safe doing so. The Jackson Street Bikeway is an opportunity to provide that infrastructure.



Today, Jackson Street operates as a one-way street north of 5th Street, two-way south of 5th Street. By converting Jackson Street in the center of Media to one-way travel between 5th and Jefferson Streets, right-of-way exists to create bicycle lanes separated from motor traffic, without sacrificing parking. DVRPC traffic counts on Monroe Street show peak-hour traffic of 474 vehicles traveling in both directions, combined. Since Jackson Street (counts unavailable) is generally less busy than Monroe, this count initially suggests that one-way conversion is possible from a traffic perspective, assuming that northbound motor traffic would rebalance to Olive and Monroe Streets, each of which should have sufficient capacity.

A key issue to resolve is how to maintain engine access and egress at the firehouse, which may require a painted bike lane (rather than physically separated) and roadway markings that permit all-way movements by emergency vehicles in the block between Front and Jasper Streets.

FIGURE 4.3 – CURRENT STREET LAYOUT AND PROPOSED PROTECTED BIKE LANE



Implementation would provide infrastructure that people of nearly all ages and abilities would feel comfortable riding from the northern edge of the borough, all the way to the Media Regional Rail Station.

Such an initiative requires significant study, civic engagement, and design before proceeding. In addition, a study could determine how to extend the bikeway north to Providence Road and

south to the Media Regional Rail Station, and how to address the roadway geometry changes north and south of this core section. As one low-cost interim strategy, however, by using temporary materials and signage, borough officials may consider conducting a pilot project to help determine viability of such an intervention.



POP-UP SEPARATED BIKE LANE IN OLD CITY

ADD BIKE RACK POSTS OR CORRALS

Just as with driving, bicycling relies on convenient storage at the destination. A single vehicular parking space, converted to bicycle parking can accommodate about ten bicycles, thereby significantly increasing the number of visitors or workers able to park downtown. The simplest option is to install more bike racks at the curbside of the sidewalk throughout downtown. The advantage of this approach is that it is relatively cost effective and easy to accomplish. The challenge, however, is that individual racks each only accommodate a single bicycle or two and Media's sidewalks are relatively narrow and already have many uses competing for space, including dining, signage, etc.

Alternatively, bicycle corrals (structures placed in vehicular parking spaces to provide bicycle parking spaces) could be installed. They may be constructed from basic public works materials (such as screw-in bike racks, concrete curbs, and flex posts) or purchased as whole kits. Local designers and manufacturers have begun to incorporate planting features or even café seating. Locations can be identified along the State Street corridor or on the first block of intersecting cross-streets

4.7 BUS RECOMMENDATIONS

Our survey found that inconvenience (49 percent) and lack of joy in the experience (19 percent) are the biggest deterrents to riding transit. Convenience and experience are generally a product of route design, speed, and frequency. By making routes more frequent and direct, operators

can improve the experience for existing riders and actually attract passengers who currently do not consider transit to be a viable option for them. Media Borough, together with the County, can make requests of SEPTA and take some actions themselves.

INCREASE SERVICE FREQUENCY

Buses currently run only once or twice an hour, rendering them an unattractive option for many people who may otherwise consider taking them. Increase service frequency for Bus Routes 110 and 118 to 20-minute headways. As the county seat, setting this minimum standard would provide more convenient access to both county offices and borough attractions.

HIGH-FREQUENCY MEDIA SHUTTLE: MODIFY ROUTE 118

Today, Route 118 runs a block away from Wallingford Station. By modifying Route 118 to directly serve Wallingford Station, Media residents can have a direct bus connection to regional rail without needing to create an additional service to Media Station (from the passenger perspective, it doesn't matter which Philadelphia-bound station a bus takes them to).

However, Route 118 currently runs very infrequently. One option for increased frequency would be to increase frequency on the whole route. However, given the length of the route, that may require capital and labor costs beyond what SEPTA is able to provide. One alternative would be to supplement service along the 118 with a shorter route that runs from Providence Road to Wallingford Station, designed to create 10-minute headways or less within Media to State Street and Regional Rail. The incremental cost of operating this service can be determined by SEPTA; the borough, county, and Authority can then discuss an appropriate means of paying this cost for additional service.

PROMOTE MULTI-MODAL BENEFITS OF THE RAIL PASS

People are often unaware that their rail pass entitles them to ride busses, trolleys and subways at no additional cost. If Route 118 becomes more convenient, this could become especially useful for borough residents destined for the Regional Rail. This benefit could be promoted on Regional Rail trains or at Regional Rail parking lots by SEPTA or the borough.

4.8 REGIONAL RAIL RECOMMENDATIONS

SEPTA regional rail provides mid-frequency service to Philadelphia and, in the future, Wawa and potentially West Chester. The station location at the edge of town makes it an amenity for the borough as a whole, but not necessarily a direct economic driver for the downtown core. The following recommendations are meant to enhance its role.



REQUEST MORE FREQUENT OFF-PEAK SERVICE

Service to and from Media is relatively frequent in the peak periods, but drops off to hourly service during off peak hours and weekends. By extending the hours of the peak period during the week and increasing weekend frequency, regional rail can become a more convenient service for borough residents and visitors alike. Media can advance this initiative by appealing to SEPTA directly, but also by asking service increases to be part of the County Plan and by lobbying the county's representatives on the SEPTA Board. Finally, Media can strengthen its case for more service demonstrating its ability to generate passengers and their access to the station, by walking, biking, or even rideshare services. The borough can demonstrate this ability by developing concrete plans and commitments to implementing them.

STATION AREA DEVELOPMENT PARTNERSHIP

Media Station is not actually within the borough. However, much like economic boundaries, transportation geographies often do not align with political ones, and Media has an interest in the condition of the Regional Rail station bearing its name. Beyond the simplest maintenance projects, however, most substantial station improvements (such as adding stairs to the outbound side), trigger a much larger station overhaul because of thresholds related to the Americans with Disabilities Act. Given SEPTA's limited capital budget and Media Station's strategic priority relative to other regional projects, local participation will be critical to achieving more than the most basic station improvements. If Media Borough, Upper Providence Township, or the county are unwilling to bear the cost of such improvements, public/private partnership in developing the larger station area may be an option for reducing the amount of public funds necessary. This would be another opportunity for the borough and township to work together on mutually beneficial land use and development planning.

STATION CONNECTOR

Build upon the adopted wayfinding program with streetscape improvements along Orange Street to State Street that includes more pedestrian lighting, better sidewalks, a map at the station, and wayfinding signage explicitly pointing the way downtown. For many people this is their entrance to the borough: It should be easy to navigate and encourage people to come onto State Street through wayfinding and aesthetic appeal. Again, this will require collaboration with Upper Providence and SEPTA.

PURSUE PLACE-BASED ADVERTISING OPPORTUNITIES

Too often, advertising on transit markets national products to a broad audience, and often gets lost in the noise. However, it can also remind passengers of the place-based shopping, dining, and recreational options they can reach on the transit they ride. As part of a coordinated Media



marketing campaign, installations on the trolley and the Market-Frankford subway could raise awareness of all that Media has to offer to a broader audience, and remind them how convenient it is to get there. Placements on the regional rail should be considered, but will reach a less targeted audience and likely result in a few trips for special occasions than generate regular visits to Media.

4.9 PARKING RECOMMENDATIONS

DO NOT PRIORITIZE ADDITIONAL PARKING AT SEPTA RAIL STATION

Today, only 39 percent of station passengers drive and the vast majority of parkers originate from outside Media (only 2 percent of drivers originate within a half mile of the station). In other words, parking at Media station does not really serve Media Borough residents. Additionally, when the new station at Wawa is complete, existing parking demand at Media is likely to decrease.

ENFORCE CURRENT PARKING RULES

Beyond providing revenue, parking enforcement maintains parking availability by discouraging employees from parking in valuable spaces or shoppers from occupying a space too long at the exclusion of others, when they could use a garage instead. Continue to rigorously enforce existing parking regulations. If parking availability is a concern among retailers and restaurateurs, enforcement of existing curbside regulations should be the first course of action.

ASSESS PRICING

If enforcement of existing regulations is not enough, assess whether parking is priced appropriately and during the right times. As a rule of thumb, rates should be calibrated to target a healthy 85 percent occupancy throughout the day and night. In other words, if spaces are regularly 100 percent occupied, they are priced too cheaply; if they are regularly only 50 percent occupied, they are priced too expensively. Generally, longer stays should be financially encouraged to be made in garages, not on the street.

ADDITIONAL LONG TERM PARKING CONSIDERATIONS

- Approach new garage construction with caution, and proceed only if municipal resources are worth being dedicated. Garage construction is an expensive proposition (as much as \$40,000 per space), and provision of parking is the most reliable predictor of increased vehicular volume, which our survey found to be generally undesirable in Media. While a new garage at Orange Street and Baltimore Avenue through a partnership with SEPTA

has been discussed, the project is not on the Authority's capital plan. The borough should consider whether construction would be worth the financial and traffic burdens, and whether customers and workers can be delivered to Media by more efficient means.

- If such asset management requires reinstating a parking authority, then the borough should initiate the process for doing so.
- Consider dedicating parking revenue, or at a minimum, any net revenue increases (above the existing \$800,000 annual) to business improvement activities, including but not limited to recruitment, marketing, management, and capital improvements throughout the downtown.



5.0 MANAGING FUTURE GROWTH

5.1 SECTION OVERVIEW

Media lives up to its motto of “Everybody’s Hometown.” With an inviting downtown area, a highly-engaged community, an excellent school district, and a low-crime environment, it is no wonder that the borough is an attractive location for workers and families. With its numerous events throughout the year, accessible public transportation, and walkable commercial corridor, Media has also built a strong reputation for visitors. These people contribute to the community, the borough’s tax base, and the overall vitality of Media. As such, current residents are right to emphasize that they want the borough to remain an affordable and welcoming community for various groups of people.

To do so, however, it is important for Media to remain welcoming of new growth, especially residential development. While seemingly counterintuitive, it is necessary to have a variety of housing options at a variety of price points. Restricting the supply of housing in Media will lead to higher housing prices. Supporting the development of new housing will help to maintain affordability by accommodating new residents without driving up the prices in the housing market. Media stakeholders have emphasized the importance of affordability and diversity, and growing the housing stock will help the borough continue to be accessible to households of all income levels and backgrounds.

As a magnet for workers, families, and visitors, the borough must properly manage the future growth and development opportunities. Proper stewardship is all the more pressing given that Media is small (less than one square mile) and that so much of this activity is concentrated along the downtown corridor. The borough must therefore be proactive in managing growth over the short, medium, and long-term. The best way to accomplish this is to build off the new development already occurring along the eastern and western edges of the borough, as doing so will allow everyone to benefit from the possibilities that this growth will offer.

5.2 NEW CONSTRUCTION

Media is currently seeing a variety of new construction (see Figure 5.1). Of particular importance are the two large residential developments to be located at the western end of Baltimore Avenue. Due to be completed in 2018, The West End Flats will comprise 162 apartment units and include numerous amenities such as an outdoor swimming pool, a common area social space, a covered parking garage, and a game/media room (map point one).¹⁴

¹⁴ “BET Investments Breaks Ground on 162-Unit Multifamily Building in Media, Pennsylvania,” ReBusiness Online, December 20, 2016. <http://rebusinessonline.com/bet-investments-breaks-ground-on-162-unit-multifamily-building-in-media-pennsylvania/>.

Directly across the street and backing up to Glen Providence Park, West End Walk is a new 27-luxury townhome community with home prices beginning at \$490,000 (map point two).¹⁵

The realm of commercial property is also seeing some significant construction activity. The new Wawa recently completed at Baltimore Pike and Providence Road is notable for being a flagship store that will also offer fueling stations (map point three).¹⁶ According to the Delco Times, this project was instrumental in the decision to demolish the Lukoil across the street. It will be replaced by a yet-to-be-named store (map point four).¹⁷ Next, the project to relocate and expand the CVS on Baltimore Avenue to a new site across the street is also underway (map point five).¹⁸ Construction has begun on a new Hampton Inn to be located at Beatty Road and Providence Road, which will supposedly be four stories tall and include some 116 rooms (map point six).¹⁹ It is expected to open in 2018. There is also a proposal to redevelop the former Towne House restaurant into a multilevel apartment complex (map point seven).²⁰

Lastly, local governments are also undertaking their own projects. Reconstruction recently began at the Third Street dam site along Broomall's Lake, with the Pennsylvania Department of Environmental Protection making safety improvements to the dam (map point eight).²² Later phases of the project will include Pennsylvania Department of Transportation's construction of a Third Street roadway. Additionally, Media Borough officials are currently in discussion with Delaware County officials and Media residents to rebuild and expand the county parking garage on Orange Street (map point nine).²³

¹⁵ "West End Walk," accessed May 23, 2017, <http://westendwalkmedia.com/>.

¹⁶ Serbin, S.L., "Officials provide update on Media Wawa plans," Delco Times, September 14, 2016. <http://www.delcotimes.com/general-news/20160914/officials-provide-update-on-media-wawa-plans>.

¹⁷ Serbin, S., "Building boom changing the face of Media," Delco Times, March 11, 2017. <http://www.delcotimes.com/general-news/20170311/building-boom-changing-the-face-of-media>.

¹⁸ Serbin, S.L. "Media won't oppose zoning change for new CVS store." DelCo Times. July 25, 2016. <http://www.delcotimes.com/general-news/20160725/media-wont-oppose-zoning-change-for-new-cvs-store>.

¹⁹ "The Hampton Inn and Suites is back and here's the latest." All Things Media. April 17, 2017. <http://allthingsmediapa.blogspot.com/2017/04/the-hampton-inn-and-suites-is-back-and.html>

²⁰ "Here's what's being proposed for the site of the former Towne House restaurant." All Things Media, PA. September 26, 2017. <http://allthingsmediapa.blogspot.com/2017/09/heres-whats-being-proposed-for-site-of.html>

²² Serbin, S.L., "Work begins at Third Street dam site in Media," DelCo Times, May 12, 2017. <http://www.delcotimes.com/general-news/20170512/work-begins-at-third-street-dam-site-in-media>.

²³ "New Parking Garages Coming to Media, PA? It's being discussed." All Things Media, <http://allthingsmediapa.blogspot.com/2017/05/new-parking-garages-coming-to-media-pa.html>.

FIGURE 5.1 – MAP OF MEDIA BOROUGH, PUBLIC TRANSPORTATION, AND NEW AND PROPOSED CONSTRUCTION

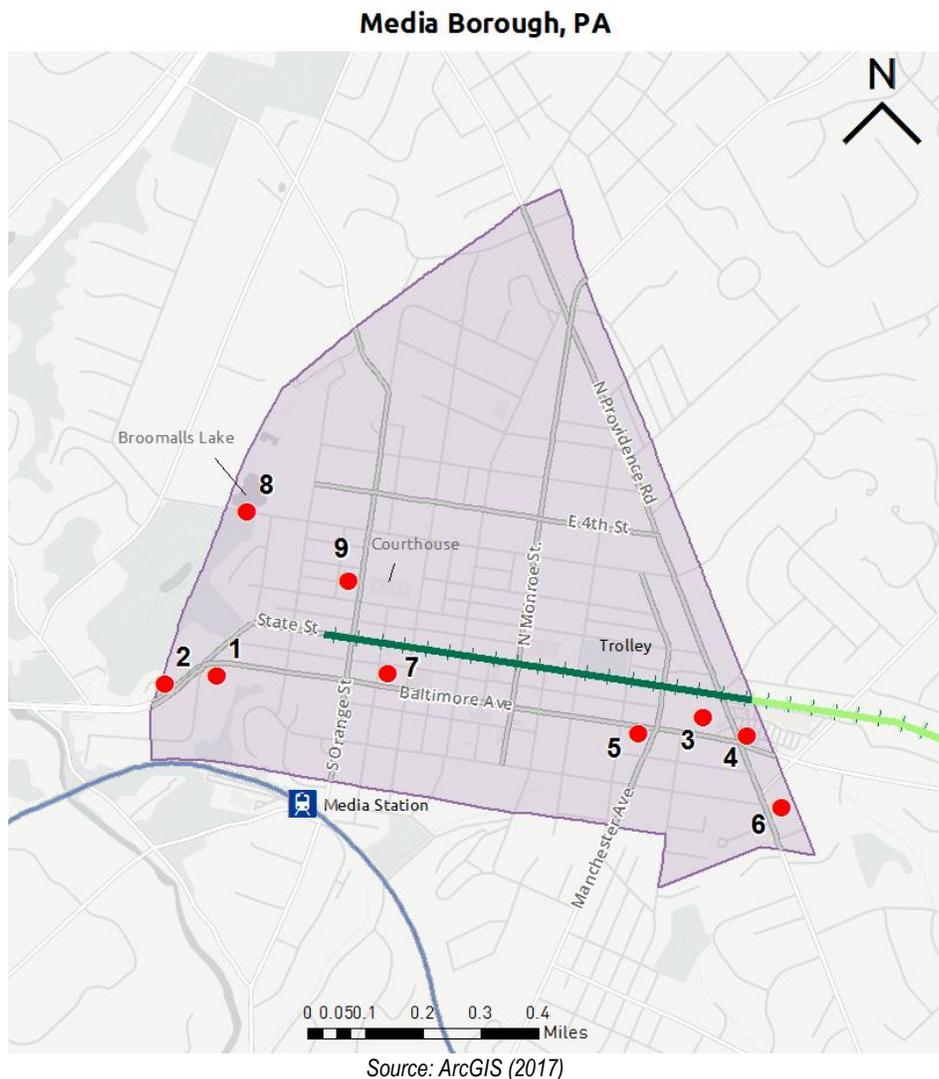


TABLE 5.1 – NEW AND PROPOSED CONSTRUCTION IN MEDIA BOROUGH

Map ID	Name	Description
1	West End Flats	162 unit apartment complex with parking and amenities
2	West End Walk	27-unit luxury townhome/duplex community
3	Wawa	Flagship 2-story Wawa with numerous fueling stations
4	Former Lukoil	Demolished; new store yet-to-be-named
5	CVS Relocation	CVS expansion and relocation across the street
6	Hampton Inn and Suites	New 116 unit hotel
7	Former Towne House Restaurant	Potential multi-level apartment building with parking
8	Third Street Dam Site	PA Dept. of Environmental Protection project
9	Rebuilding County Parking Garage	Proposed rebuild of garage to increase capacity

5.3 ECONOMIC DEVELOPMENT RECOMMENDATIONS

CREATE INVENTORY OF UNDERUTILIZED LOCATIONS

Create an inventory of vacant and underutilized locations, to be maintained by the borough, and target them for development. Several of these sites are along Baltimore Avenue. For example, the northwest corner of West Baltimore Avenue and Lemon Street and the southeast corner of West Baltimore Avenue and Lemon Street are both currently vacant. Begin this inventory on the western edge of the borough and work eastward. In the meantime, before redevelopment occurs, one of these sites at Baltimore Avenue and Lemon Street intersection may prove to be an attractive location for a farmer's market.

FUTURE OPPORTUNITIES FOR BALTIMORE AVENUE

Mixed-Use Walkable Development Corridor

Recent developments and rising prices are a clear indicator of demand, especially in the residential sector. As a means of reducing any negative impact on the form and character of built-out historic sections of the borough, Baltimore Avenue could be a natural outlet for this demand. Baltimore Avenue is currently zoned for "Highway, Business Office." While uses permitted include "All uses permitted by right in the Retail-Office-Apartment District, including vertical mixed use buildings with retail use on the ground floor," the district also permits several auto-oriented uses, including car dealers, gas stations and drive-through, which are incompatible with a walkable district. Additionally, current minimum parking standards make fine-grain walkable development patterns difficult, if not impossible to achieve.

Consider rezoning the corridor to better accommodate pedestrian-oriented mixed-use development by preventing incompatible neighborhoods and providing more compatible dimensional standards, either by changing the zoning to "Residential Office Apartment," akin to State Street, or developing a new district, tailored to the aspirations for Baltimore Avenue. This may be part of the form-based zoning process currently under consideration by the borough. In a new district, regulations could include parking maximums (rather than minimums), traditional urban forms, as-of-right permits for residential, and flexibility to allow for retail in the future, even if not requiring it today.

Redesign High Traffic Intersections

Redesign intersections at Orange, Olive, Jackson, and Monroe Streets for pedestrian comfort and safety, possibly including curb extensions. These areas have already been identified as important pedestrian improvements, and will only increase if Baltimore Avenue becomes an outlet for development pressure. This will also help to connect residents that are south of Baltimore Avenue to the downtown corridor in Media, which has been a stated goal of borough Council members. Figure 5.2 illustrates how an intersection can be redesigned to promote safety, highlighting multiple aspects of street design, including crosswalks.



FIGURE 5.2 – EXAMPLE STREET REDESIGN TO IMPROVE CROSSWALK SAFETY



Source: National Association of City Transportation Officials

Parking Meters

Consider future expansion of parking meters as demand increases. And consider electronic meters for ease of use.

BUILDING UPON THE INDUSTRIAL AREA

Creative Industry “Pink Zone”

Consider repositioning the southwest corner of the borough as a creative district. This would include reviewing uses permitted as-or-right, lightening red tape for additional uses or temporary structures, and strategizing recruitment and cultivation.

Good examples would likely include “new industrial” uses such small-batch food production, shared commercial kitchens, artisanal manufacturing, and temporary artistic uses, perhaps supplemented by as a family beer garden akin to The Creamery in Kennett Square. Given the proximity to the Media Arts Council, this could also be a good location for artists and artisans who are contributing to public art and station design in Media.



THE CREAMERY, KENNETT SQUARE

Developing a creative district will require significant community input with a variety of stakeholders including the existing businesses in the current industrial area, the Media Arts Council, as well as interested residents. This type of long term vision requires diligent planning and community participation and may be a good project to be reviewed and implemented through the form-based zoning process that the borough is considering.

6.0 IMPLEMENTATION PLAN

6.1 OVERVIEW AND IMPORTANCE OF AN ACTION PLAN

Once the analysis is completed, conclusions formulated, and recommendations identified, it is important to develop a comprehensive, action-oriented implementation plan. This plan can be seen as a roadmap for the borough and overall community to realize the short and long-term goals in the next five to ten year timeframe.

While a number of important recommendations have been identified, the following implementation plan helps to prioritize the most critical action steps, sort them into the appropriate timeframe, and identify the responsible party. These recommendations are chosen because they represent high-impact interventions that are relevant to Media's situation and ones that can be successful in the current and projected economic conditions.

It is important to note that the implementation plan should be further reviewed and developed by the Borough Council in conjunction with the latest priorities and funding restraints. This is the entity that must provide the leadership for the economic development plan. While there are a number of responsible parties for specific recommendations, it is the Council that must drive the effort and proactively work with the MBA, business owners, landlords, and residents to ensure the future economic vitality of Media.



6.2 SUMMARY OF RECOMMENDATIONS

<u>Immediate (Year 1)</u>	
Retail	Responsible Party
Realign function and focus of the MBA	Borough/MBA
Expand MBA marketing focus beyond events	MBA
Undertake a physical storefront condition audit	Borough/MBA
Maintain consistent store hours	Businesses/MBA
Adopt a proactive approach to marketing	MBA/Borough
Adopt a social media policy for downtown and other commercial areas	MBA/Borough
Consider a promotional retail event that correlates with special events	MBA
Launch a retail business recruitment plan	MBA/Borough
Placemaking	Responsible Party
Begin a “parklet” program	MBA / MAC
Pilot project: convert traffic signals on State St	Borough
Transportation	Responsible Party
Promote the trolley and Market-Frankford Line	MBA/Borough
Modernize trolley Infrastructure	Borough
Implement bike sharrows	Borough
Pilot project: separated bike lane on Jackson St	Borough
Add bike rack posts or corrals	MBA
Increase bus service frequency	SEPTA/Borough/County
Promote multi-modal benefits of the rail pass	Borough
Request more frequent regional rail service	Borough
Do not prioritize additional regional rail parking	Borough
Pursue transportation advertising opportunities	MBA
Enforce current parking rules	Borough
Assess parking pricing	Borough
Review additional long-term parking considerations	Borough
Economic Development	Responsible Party
Create inventory of underutilized locations	Borough

Short Term (Years 2-5)

Retail

Relocate the MBA out of borough hall
 Fine-tune the purpose for and the process of collecting the mercantile tax
 Enforce building codes to address access and physical elements
 Embrace the "Main Street" fundamentals
 Develop and track metrics that appeal to target audiences & industries
 Create a testimonial campaign

Responsible Party

MBA/Borough
 Borough
 Borough
 MBA/Borough
 MBA
 MBA

Placemaking

State-Baltimore Connector and incorporated civic art project
 Integrate Plum St Mall & trolley into seamless design
 Station connector

Responsible Party

Borough/MAC
 Borough/SEPTA/MAC
 Borough/MAC

Transportation

Develop metrics to assess future trolley expansion
 Advance planning for Media-Smedley Connector
 Modify bus route 118
 Station area development partnership

Responsible Party

SEPTA/Borough
 Borough/County
 County/SEPTA
 Borough/County/SEPTA

Economic Development

Mixed-use walkable development corridor along Baltimore Ave
 Redesign high traffic intersections along Baltimore Ave
 Creative industry "Pink Zone"

Responsible Party

Borough
 Borough
 Borough

Long Term (Years 6-10)

Transportation

Reduce the number of trolley stop locations
 Increase Trolley service frequency

Responsible Party

SEPTA
 SEPTA

Placemaking

Consider modifications to events on State Street
 Install public art at trolley and regional rail station stops

Responsible Party

MBA
 MAC/MBA/SEPTA

Economic Development

Consider expanding parking meters along Baltimore Ave

Responsible Party

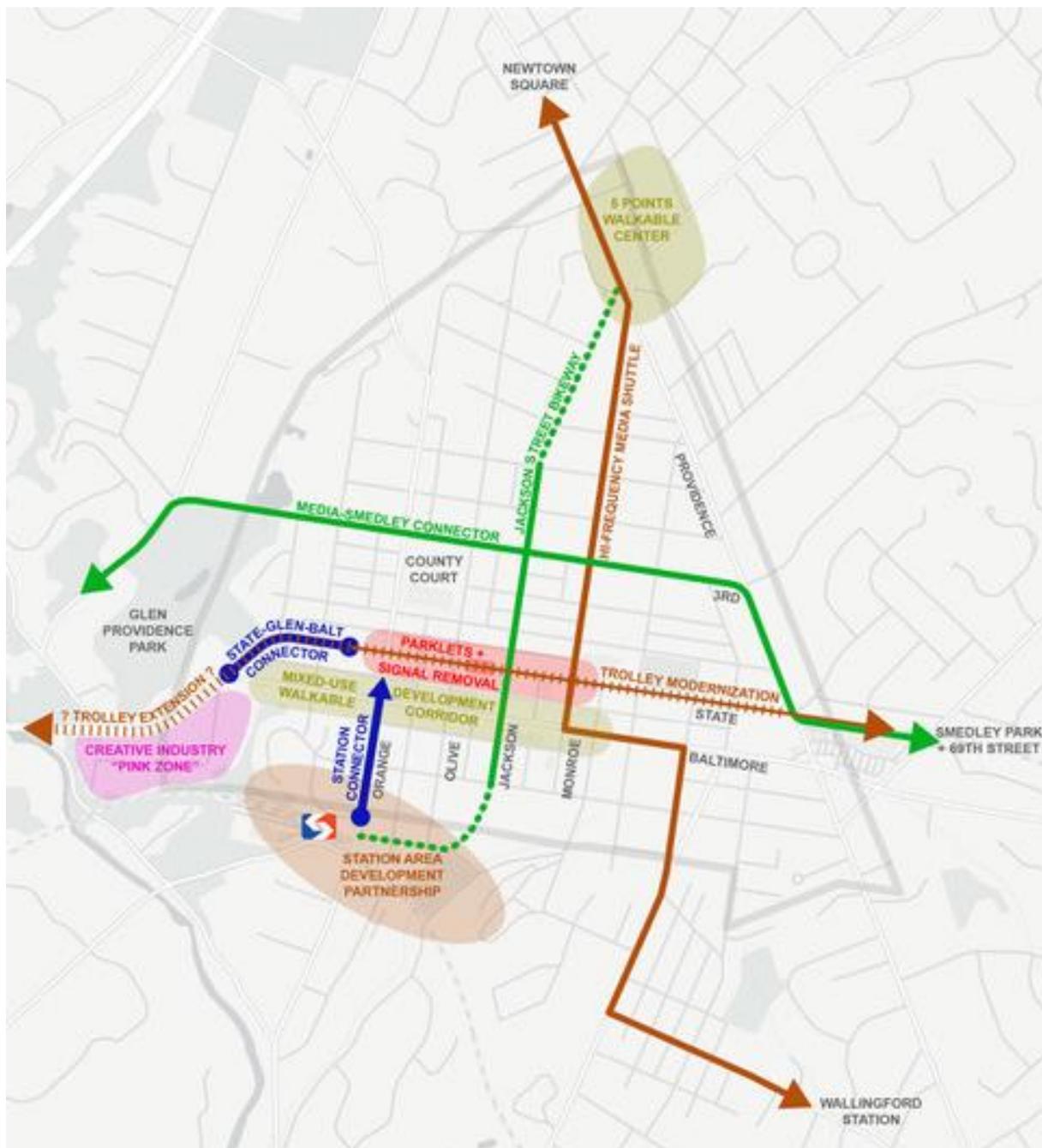
Borough



6.3 COLOR CODED MAP

The map below highlights and summarizes key development, transportation, and placemaking opportunities identified in this economic strategy.

FIGURE 6.1 – MAP OF RECOMMENDATIONS



APPENDIX A: ADDITIONAL RETAIL ANALYSIS

A.1 GAP ANALYSIS

TABLE A.1 – COMPARATIVE GAP ANALYSIS FOR SELECT GENERAL RETAIL CATEGORIES

Media Borough	Demand (Retail Potential)	Supply (Sales)	Gap
Furniture & Home Furnishing Stores	\$3,296,497	\$2,880,862	\$415,635
Electronics & Appliance Stores	\$5,365,893	\$4,294,389	\$1,071,504
Clothing & Accessory Stores	\$5,307,734	\$5,137,105	\$170,629
Shoe Stores	\$7,486,998	\$0	\$748,698
Sporting Goods	\$2,812,832	\$341,450	\$597,618
General Merchandise	\$16,876,419	\$4,337,643	\$12,538,776
10-Min Walk time			
Furniture & Home Furnishing Stores	\$2,631,745	\$2,889,862	(\$249,117)
Electronics & Appliance Stores	\$4,312,140	\$3,399,640	\$912,500
Clothing & Accessory Stores	\$4,272,285	\$4,741,118	(\$468,833)
Shoe Stores	\$603,552	\$0	\$603,552
Sporting Goods	\$2,259,983	\$2,641,911	(\$381,928)
General Merchandise	\$13,525,159	\$3,940,190	\$9,584,969
5-Mile Drive			
Furniture & Home Furnishing Stores	\$90,974,109	\$62,579,874	\$28,394,235
Electronics & Appliance Stores	\$145,207,327	\$165,406,444	(\$20,199,117)
Clothing & Accessory Stores	\$141,767,545	\$121,698,608	\$20,068,937
Shoe Stores	\$19,818,676	\$12,251,120	\$7,567,556
Sporting Goods	\$74,749,541	\$48,583,170	\$26,166,371
General Merchandise	\$443,572,428	\$504,463,003	(\$60,890,575)
10-Mile Drive			
Furniture & Home Furnishing Stores	\$362,482,739	\$146,916,389	\$215,566,350
Electronics & Appliance Stores	\$577,083,086	\$373,048,230	\$204,034,856
Clothing & Accessory Stores	\$568,895,377	\$377,617,540	\$191,277,837
Shoe Stores	\$80,101,025	\$47,389,592	\$32,711,433
Sporting Goods	\$257,323,358	\$110,733,361	\$146,589,997
General Merchandise	\$1,785,758,050	\$1,210,864,491	\$574,893,559

Source: ESRI (2017)



TABLE A.2 - AVERAGE ANNUAL SPENDING BY RETAIL CATEGORY

	Media Borough	10-Min. Walk Time	5-Mile Drive	10 Mile Drive
Average Total Expenditures	\$68,801	\$69,384	\$83,791	\$70,756
Apparel (& Services)	\$2,132	\$2,162	\$2,536	\$2,160
Computers & Hardware for Home Use	\$191	\$194	\$224	\$188
Education	\$1,566	-	\$2,051	\$1,667
Entertainment & Rec	\$2,987	\$3,009	\$3,669	\$3,069
Food	\$8,527	\$8,626	\$9,853	\$8,517
Food Away from Home	\$3,266	\$3,306	\$3,810	\$3,258
Food at Home	\$5,261	\$5,320	\$6,042	\$5,258
Alcoholic Beverages	\$562	\$570	\$671	\$558
Home - Mortgage Payment	\$7,837	\$7,730	\$11,706	\$9,160
Housing	\$21,886	\$22,183	\$26,292	\$22,428
Household Furnishing & Equipment	\$1,815	\$1,827	\$2,237	\$1,865
Childcare	\$432	\$438	\$552	\$464
Healthcare	\$5,289	-	\$6,589	\$5,507
Pensions and Social Security	\$6,789	\$6,821	\$8,775	\$7,194
Travel	\$1,877	\$1,885	\$2,514	\$1,998

Source: ESRI (2017)



TABLE A.3 - COMPARISON OF FOOD SERVICE & RELATED DEMAND GAPS FOR MEDIA AND TRADE AREAS

Media Borough	Demand (Retail Potential)	Supply (Retail Sales)	Gap
Food Service and Drinking Places	\$10,574,529	\$27,485,007	(\$16,910,478)
Special Food Services	\$248,303	\$221,163	\$27,140
Drinking Places - Alcoholic Beverages ²⁴	\$562,730	\$0	\$562,730
Restaurants/Other Eating Places	\$9,763,496	\$27,263,844	(\$17,500,348)
Primary Trade Area - 10 Min Walk			
Food Service and Drinking Places	\$8,501,112	\$25,074,481	(\$16,573,369)
Special Food Services	\$198,666	\$221,163	(\$22,497)
Drinking Places - Alcoholic Beverages	\$454,123	\$0	\$454,123
Restaurants/Other Eating Places	\$7,848,323	\$24,853,318	(\$17,004,995)
Secondary Trade Area – 5-Mile Drive			
Food Service and Drinking Places	\$280,888,249	\$239,923,586	\$40,964,663
Special Food Services	\$7,067,281	\$10,588,575	(\$3,521,294)
Drinking Places - Alcoholic Beverages	\$16,062,363	\$4,885,716	\$11,176,647
Restaurants/Other Eating Places	\$257,758,605	\$224,449,294	\$33,309,311
Regional Trade Area – 10-Mile Drive			
Food Service and Drinking Places	\$1,124,602,487	\$757,761,307	\$366,841,180
Special Food Services	\$27,905,869	\$38,146,739	(\$10,240,870)
Drinking Places - Alcoholic Beverages	\$62,737,945	\$31,460,600	\$31,277,345
Restaurants/Other Eating Places	\$1,033,958,673	\$688,153,968	\$345,804,705

Source: ESRI (2017)

²⁴ The category Drinking places may be a nuance based on how Pennsylvania manages liquor licenses and bars and this demand may be folded into Food Services and Drinking Places Category



RETAIL MARKETPLACE PROFILE & LEAKAGE/SURPLUS FACTOR

ESRI's U.S. Retail Marketplace Report provides a comparison between retail sales and consumer spending by households. The information provided in the report is useful to measure retail activity in a trade area, and compare consumer sales to consumer spending by NAICS industry classifications including food and drink, electronics, health and personal care and more. The report also measures the gap between supply and demand.

In the report, the Leakage/Surplus Factor measures the balance between the volume of retail sales (supply) generated by retail businesses and the volume of retail potential (demand) produced by household spending on retail goods within the same industry. Leakage in an area represents a condition where demand exceeds supply. In other words, retailers outside the market area are fulfilling local demand for retail goods and products, and sales are "leaking" out of the trade area. Surplus in an area represents a condition where supply exceeds the area's demand. Retailers are attracting shoppers (sales) from outside the trade area.

The Retail Marketplace Profile (Figure A.1) shows information graphically. Below is the Leakage/Surplus Factor for the borough's primary trade area. Surplus is represented by a negative factor and shown on the left portion of the graph. Leakage is represented by a positive factor and shown on the right portion of the graph.

This report can be confusing and even counterintuitive. Surplus is not always an indication of strong sales, and a gap does not always present an opportunity for new retail. For example, the report for the 10-minute walk time from the intersection of State and Jackson streets shows that "Motor Vehicles & Parts" has a large leakage (unmet demand). However, retailers that operate in this industry have large trade areas that often encompass multiple markets/communities. Much of this demand is already being met in the larger retail market.

Conversely, "Food Services & Drinking Places" industry subsector shows significant surplus based on households in the trade area. The report does not account for Media's position as a dining destination and the ability of Media's restaurants to draw customers from the region into the trade area.

These reports are just two in a portfolio of reports from ESRI, and data from sources such as the US Census and the Bureau of Labor Statistics, that we use to evaluate a market's retail potential.



FIGURE A.1 – RETAIL MARKETPLACE PROFILE

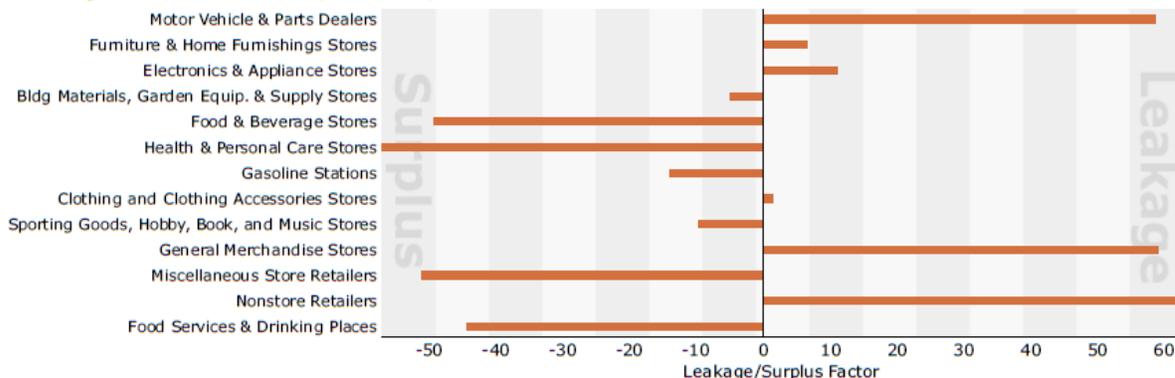


Retail MarketPlace Profile

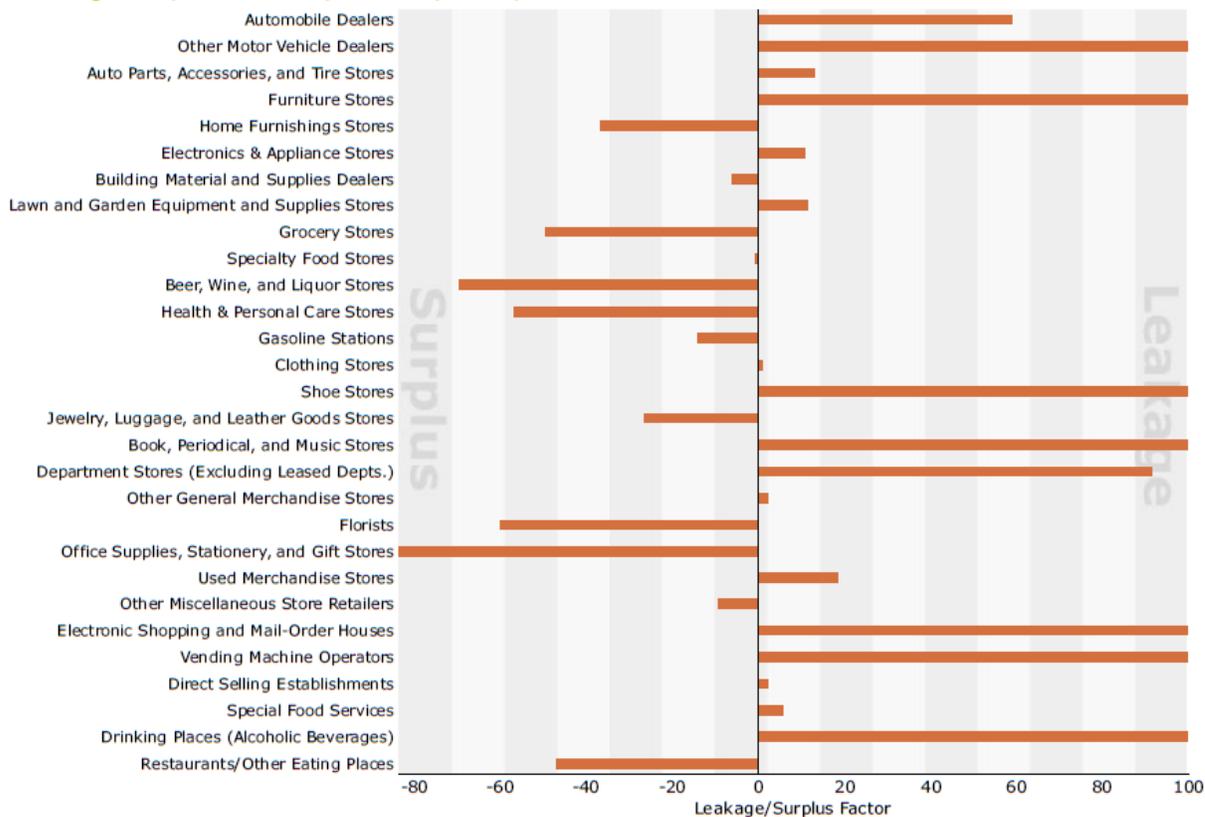
Media Borough, PA
 Media Borough, PA (4248480)
 Geography: Place

Prepared by Esri

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



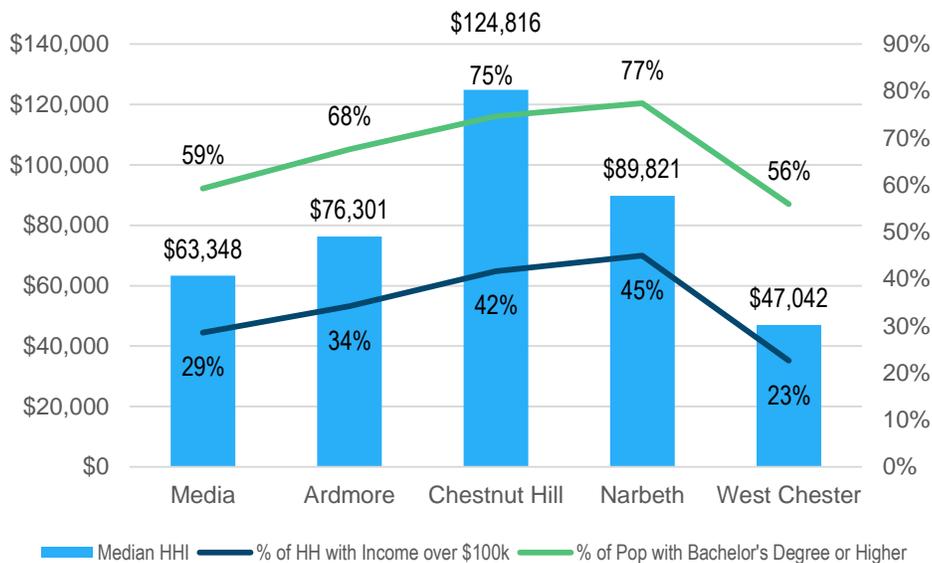
Source: Esri and Infogroup. Retail MarketPlace 2016 Release 2. Copyright 2016 Infogroup, Inc. All rights reserved.

Source: ESRI (2017)



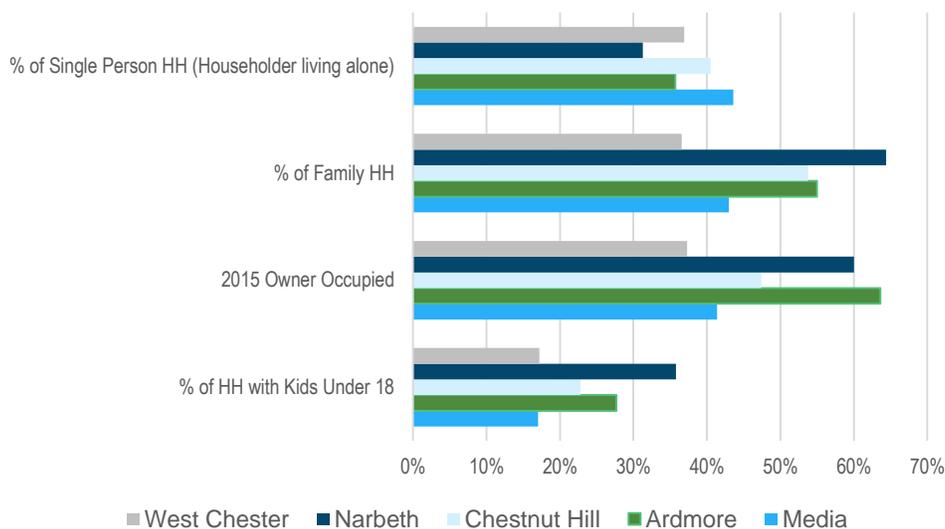
A.2 COMPARATIVE ANALYSIS

FIGURE A.2 – COMPARISON OF HOUSEHOLD INCOME AND EDUCATION



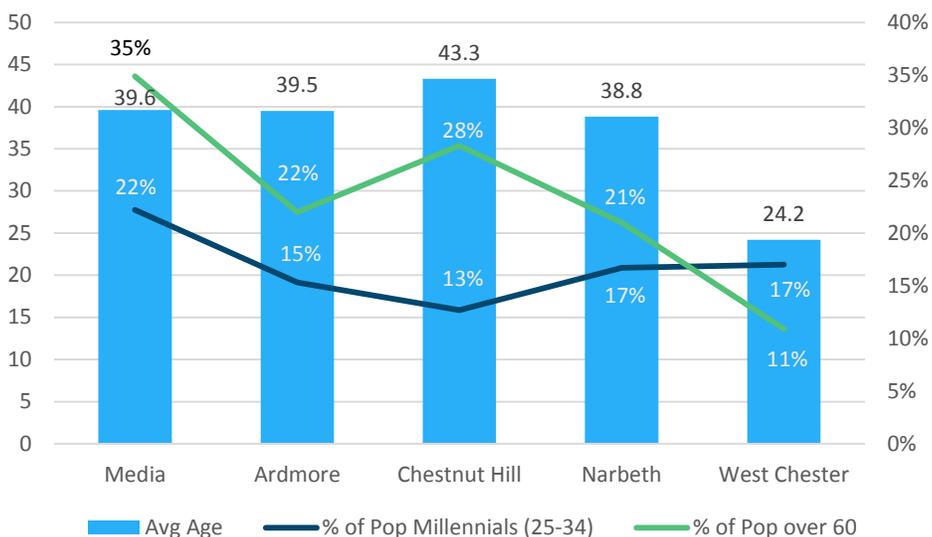
Source: US Census (2015)

FIGURE A.3 – COMPARISON OF HOUSEHOLD COMPOSITION



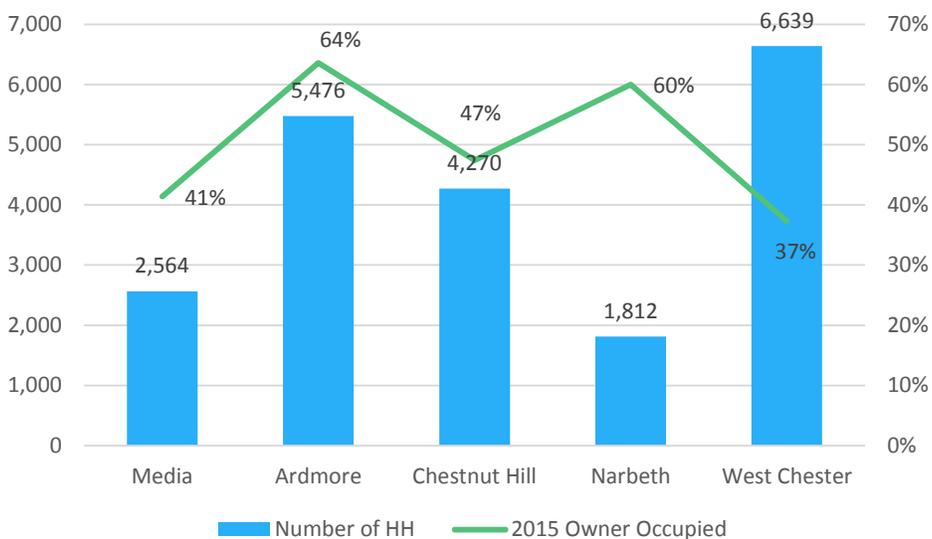
Source: US Census (2015)

FIGURE A.4 – COMPARISON OF AGE



Source: US Census (2015)

FIGURE A.5 – COMPARISON OF HOUSEHOLDS AND HOMEOWNERSHIP



Source: US Census (2015)

A.3 BEST PRACTICES FROM AROUND THE COUNTRY

Hire a Dedicated Retail Recruiter

Many cities dedicate a retail attraction team, focused entirely on new retailer attraction and existing retailer expansion. This can significantly and positively influence retail investment and

retail location decisions and, along the way, accelerate timing. A dedicated retail recruiter can raise a community's profile within the industry; market sites to tenants; and recruit new businesses to fill gaps in market offerings. To succeed, these retail staff must be laser-focused on marketing and promoting data and market intelligence of interest to retail prospects and on marketing to those prospects. Additionally, they need to build a network. Their audience needs to be brokers (local and national), tenants, investors, and even designers.

Retail recruiters should have:

- (1) A clear and realistic mission;
- (2) An equally as clear and realistic understanding of the marketplace's economic and real estate (including strengths, weakness, opportunities and challenges);
- (3) Applicable skills in and marketing tools for economic development and real estate; and,
- (4) A demonstrated ability to sell and follow through.

Inventory of Available Sites

Searchable web-based data bases allow potential investors, entrepreneurs and tenants or brokers to explore and review available retail properties. Most of these web based inventories are searchable by either standard criteria (size, geography/street, and zoning). These inventory sites can be developed as part of a local government site or as a separate web portal. Strong examples include <http://wdceprss.dc.gov> and Philadelphia Retail Marketing Alliance at www.philadelphiaretail.com.

Some communities utilize industry-listing services such as LoopNet and Costar. Appleton Wisconsin offers listings, for sale and lease, in a simple list with corresponding map which identifies the location. Their audience is brokers, owners, investors and tenants. It is commonly free to post a listing and to search listings. Philadelphia and Denver use this tool to market retail sites and vacant properties suitable for development. It's also an opportunity to market vacant and underutilized buildings and sites to investors and to facilitate matching of tenants to sites.



Map



1	10 College Avenue Appleton, WI 54911	2	530 W College Avenue Appleton, WI 54911	3	400 N Richmond Appleton, WI 54913
4	210 W College Avenue Appleton, WI 54911	5	900 W College Appleton, WI 54911	6	200 E. Washington Street Suite 2A Appleton, WI 54911
7	225 N. Richmond Street Appleton, WI 54911	8	100 W. Lawrence St. Appleton, WI 54911	9	122 East College Avenue Appleton, WI 54911
10	222 W. College Avenue Appleton, WI 54911	11	222 W. College Avenue Appleton, WI 54911	12	200 E. Washington St. Appleton, WI 54911
13	103 W College Avenue Appleton, WI 54911	14	423 W College Ave Appleton, WI 54911	15	122 E. College Ave. Appleton, WI 54911
16	500 w. franklin street Appleton, WI 54911	17	222 N. Oneida St. Appleton, WI 54912	18	103 E College Appleton, WI 54915
19	100 East College Avenue Appleton, WI 54911	20	513 West College Avenue Appleton, WI 54911		

APPLETON WISCONSIN SITE DATA BASE

Make Current Market & Demographic Information Available

A community can enhance consideration of local sites, by making current market data easily available on targeted and priority geographies and make the due diligence process just one-step simple. Data is much easier to come by today with the plethora of online resources. All retailers and their representatives use market data to make site selections decision. However sometimes a potential tenant may be looking at a market incorrectly or at the wrong geography. This data should be updated annually at minimum, more frequently if necessary.



Some cities provide a simple demographic snapshot on their local government website site, some create Facebook pages. A few communities take access to data to a higher level with searchable links and access to sources such as ESRI. However, these can be cumbersome and time consuming. Lancaster City provides visitors an exported PDF report (below) with one click, about resources, incentives, and other tools and information about the local retail market.

WELCOME TO THE CITY OF LANCASTER
 A compact city of seven square miles and 60,000 residents, Lancaster City is located within driving distance of Washington DC, Baltimore, Philadelphia, and New York. Lancaster is about much more than our geographic location, but a growing vibrant urban center where historic preservation and a cutting-edge arts scene live and thrive side by side; a city of neighborhoods that are safe and welcoming; a city that encourages entrepreneurship and investment; a city that values the cultural, ethnic, and diverse lifestyles of our residents, businesses and guests.

DEMOGRAPHICS
 (Median / Approx 2014)

POPULATION
60,000 AND GROWING—2% PROJECTED GROWTH OVER THE NEXT 5 YEARS

MEDIAN AGE
34.64 YEARS

OVER 25 YEARS OF AGE
37,500 COUNTY: 350,000

ASSOCIATE COLLEGE DEGREE OR HIGHER
8,000 (21%) COUNTY: 103,000

HOUSEHOLDS
22,260

AVERAGE HOUSEHOLD INCOME
\$42,500 AND RISING
 COUNTY: \$56,200 / USA: \$62,000

CITY OF LANCASTER HIGHLIGHTS

- Over \$1.5 billion in investment completed, under construction or announced since 2005.
- Over \$8 million in public space improvements completed, planned or now underway—including new sidewalks and amenities, repaved streets and open space projects.
- Lancaster County Convention Center and Lancaster Marriott at Penn Square—\$17 million facility opened in June of 2009. Bringing 170,000 people to the City annually.
- The nation's 32nd busiest Amtrak station, serving over 500,000 passengers annually.
- Clayton Magazine Stadium—Employs 500,000 in annual attendance and is the home of the Lancaster Barnstormers.
- Franklin & Marshall College—2,000 students with a continued campus expansion.
- Ranked 4th Most Exciting Small City in the U.S. —*By.com, Best Small, 2012*
- Ranked best in country as America's most visited "non-city city" —*Crude West, Traveler, make your*
- Ranked 4th Most Exciting Small City in the U.S. —*By.com, Best Small, 2012*
- Ranked best in country as America's most visited "non-city city" —*Crude West, Traveler, make your*
- Ranked 4th Most Exciting Small City in the U.S. —*By.com, Best Small, 2012*
- Ranked best in country as America's most visited "non-city city" —*Crude West, Traveler, make your*

Lancaster's Long's Park Art and Craft Festival named the 2014 art show and the #6 fine craft show in the U.S. —*Art Now, 2014*

Recognized as one of the "Top 50 Cities that Sizzle." —*Nation's Restaurant News*

Images: People walking on a street, a building facade, a street scene with a person walking, a building facade, a street scene with a person walking, a building facade.

Regardless the approach, communities build credibility by using reliable data and sources commonly used by the industry (Census, ESRI, Claritas) and present it in a format that is easy to use.

Animate Vacant Storefronts & Dead Spaces

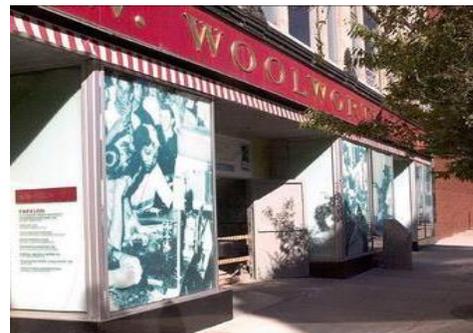
Vacant storefronts can send a negative image and have a deleterious impact on a commercial corridor's overall appeal. Communities and neighborhood organizations have utilized creative approaches to minimize the visual impact of vacant storefronts for decades. The two most common practices for retail storefronts are window coverings typically artistically done (art, advertising) and temporary window displays. Signage and/or art on the window can be undertaken at minimum cost. Some cities use vacant windows to market their downtown/neighborhood organization and available space. Others use the storefront for advertising and promotion. The costs associated with this are limited to the materials and installation. Most print and sign companies can do generate these for less than \$1,500.00 including installation and design of an adhesive covering (72 x 48 - \$750). Adhesive window coverings are preferable to paint as they are the easiest to remove. Many older main streets have metal grate coverings for security. These can also be painted.





Sometimes landlords can be encouraged to open their vacant storefronts to local organizations and nonprofits to keep the space activated. Detroit has optimized vacant storefronts for local entrepreneurs and start-ups as part of promoting brand awareness for the businesses and their local program Motor City Match. Artistic installations are also a trendy way to activate the space.

The costs associated with this type of installation typically include power associated with illuminating the window, liability insurance (if a property owner requires this during installation and the duration of exhibit), and cost of display materials. The Downtown DC BID used window displays as a fundraising tool when the vacancy rate was exceptionally high. They rented vacant windows in a former department store to offset costs associated with marketing vacant retail space. San Francisco has a program for art installations in vacant storefronts; Greensboro used a vacant storefront to market the new Civil Rights Museum that was opening in the former Woolworth & Company site



CIVIL RIGHTS MUSEUM GREENSBORO

Maintain Storefronts & Window Displays

Retailers in downtown districts face many challenges including maintaining and freshening their storefronts on a regular basis. Larger and national chains have budgets for merchandising and to hire experts.



Many cities have façade renovation programs to ensure storefronts are maintained. Some communities provide grants, others offer low interest loans to small businesses, even forgivable ones. Simple paint-up fix-up initiatives, that include painting and new exterior elements (awnings, lights) are beneficial to keeping storefronts fresh and inviting.

Activate Vacant Lots and Walls with Art, Decorative Fencing, and Landscaping

Vacant lots, including surface parking lots, can pose a threat to public safety and attract trash and debris. These properties that exhibit traits of neglect can also negatively affect the overall economic health and appeal of a commercial corridor. Some cities create ordinances that can impose penalties for continuing to maintain a vacant property, or provide incentives for rehabilitating and reusing the property.



Reuse and protecting the boundaries of these lots can have a positive impact on a commercial corridor. Borders can also help to define and add interest to vacant lots. A fence in combination with landscaping, or a landscaped edge treatment in lieu of fencing, provides an attractive boundary for a vacant lot and visually defines it as being tended, cared for, or in use.

Cities across the country are implementing urban garden programs that serve multiple purposes including cleaning up a lot, enhanced landscaping and physical improvements and education around healthy eating. Detroit, Cleveland, DC and Philadelphia have all enacted urban garden programs. Programs that enlist local participation also tend to realize greater community engagement around maintaining the lot. Urban agriculture and gardens are another means of activating vacant lots and have an added benefit of helping to revitalize local economies.

Charlottesville, Atlanta and Cleveland both have programs that foster the public art in downtown and neighborhoods. Art is generally respected by graffiti artist and often embraced by local businesses and suppliers.

“Buy Local” Campaigns

Buy Local Campaigns are used by many communities to promote retail and shopping to local markets and keep retail dollars within the community, enhance competitiveness and sustainability of area businesses and to thwart shopping online. National and local organizations that work together can strengthen

SMALL BUSINESS
SATURDAY
NOVEMBER 26
#SHOPLOCALWPB



independent businesses as well as downtown and commercial areas. Often driven by retailers themselves or business associations, these campaigns have proved helpful in driving traffic into stores and business-to-business exchange and include advertising, collateral material and websites.

Loyalty programs are being introduced by some communities which are especially important for independent companies. Several cities have built funding and resource pools that can be used in downtown areas as well as neighborhoods. Participation in Small Business Saturday is increasingly popular with small communities. This is a national initiative and brand concept consumers identify with which helps support local retail.

Short-term Startup Rent Subsidies

Goldman Properties used subsidies in Mid-Town Village in Philadelphia to achieve a merchandise mix with a strong entrepreneurial presence. Subsidies by the landlords have also been effective tools in Charlotte, sponsored by the Charlotte Center City Partners (BID). A similar tool was implemented in Downtown Vancouver in the Eastside neighborhood. Utilized on a case-by-case program, it is intended to bring essential retail into the neighborhood and offset costs in the first three years, allowing a business to become financially sound. The Lease-Subsidy Program (the “Program”), is being managed by the Vancouver Economic Development Commission (VEDC) in consultation with Real Estate Services, Planning and representatives from the community.

Funding for Retail Recruitment and Retention

Public funds to support retail attraction and expansion are increasingly popular. These range from low interest loans to fund working capital to larger even forgivable loans to support tenant fit out and large capital expenditures, even site acquisition. The following are a few examples.

College Park MD: Business Retention Fund: Created to help retain high-quality retail tenants, the program is now open for its second cycle of funding. The program offers up to \$5,000 in grant funds for leasehold improvements of existing, locally owned retail businesses. The reimbursement grant will cover up to 50 percent of the total improvement costs for qualifying businesses. Applicants are ranked on various criteria with the highest scoring applicants receiving grants.

College Park, MD: Retail Attraction & Expansion Fund: The city is offering up to \$25,000 in grant funds for leasehold improvements for new and expanding retail businesses. The reimbursement grant will cover up to 50 percent of the total improvement costs for qualifying businesses. The program will target locally-owned and independent businesses that fill a void in the city’s retail environment such as an apparel store, coffee shop, full service restaurant, and health club. New or expanding businesses can apply for matching grants of up to \$25,000 to help cover their improvement costs and extensions of 1,000 square feet or more. The fund is intended to attract independent, locally owned businesses to vacant retail spaces in College Park.

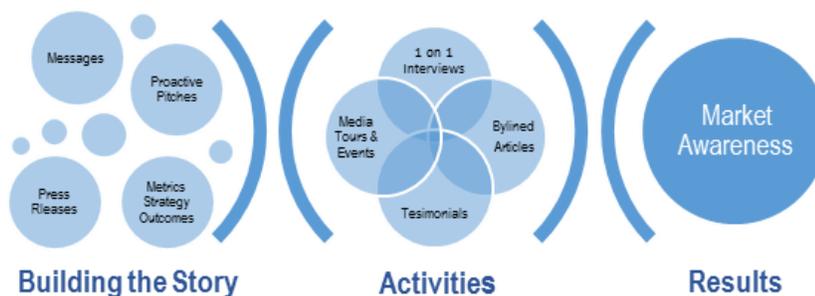


Great Streets Retail Small Business Reimbursement Grants, The Government of the District of Columbia through the Office of the Deputy Mayor for Planning and Economic Development (DMPED) administers the fund which provides competitive grants of up to \$50,000 for qualified small business owners who wish to improve their place of business. The purpose of the grant program is to support existing small businesses, attract new businesses, increase the District's tax base, create new job opportunities for District residents, and transform emerging commercial corridors into thriving and inviting neighborhood centers. This grant can be applied towards the following hard costs including build-out of new or vacant space and for underwriting heavy equipment and interior and exterior improvements.

\$hop Baltimore Loan Program The purpose of the \$hop Baltimore Loan Program is to promote attractive and healthy neighborhood retail districts by providing flexible gap financing in the form of below-market interest rate loans to eligible retail businesses located in designated commercial districts, Retail Business District License areas, and Main Street districts. Maximum \$100,000, not to exceed 50 percent of total project costs.

Marketing & Outreach

Strategic retail marketing is essential to ensure a community is accurately delivering its message to its target audience – in this case retailers. Demonstrating economic viability and promoting economic opportunities is also an important part of this process.

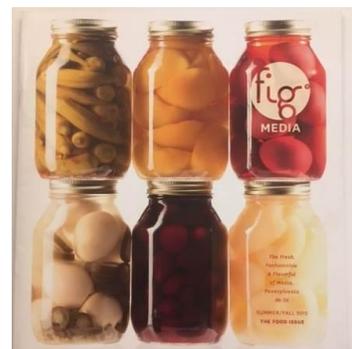


The Internet and social media are useful tools to amplify a market to its intended audience. Yet retail is still a relationship-based business – whether between to consumer and the retailer, or the community and the retailer.

Media & PR Using Buzz Helping Attract Retailers to a Market

Effective buzz is centered on growth and expansion, new business development, and the population – all issues retailers want to know about it. You can also use PR to enhance your tourism and visitor traffic. Media used to distribute a publication entitled *FIG* which was well received.

Not to be overlooked are those print and online publications that reach your audience of retailers – local, regional and national.



Publications such as *Philadelphia Magazine*, *Philly.com*, *Philadelphia Style*, “Lifestyle” – the section within the *Inquirer* and national ones as *National Restaurant News*, *Shopping Center Business*, *Independent Retailer*, *Eater.com*, and *Gourmet Retailer*. Courting travel and food writers is a wonderful way to gain continuous exposure about food offerings and events in the borough.

Lists and Blogs Today’s tech savvy consumer is just one click away from the latest list, ranking and blog. Search engine optimization (SEO) can be useful to capture the attention of these lists, for there are too many in the market to capture. Targeting a select few is an ideal way to raise Media’s profile in front of intended audiences. Locally there is FooBooz, Philly Hoody, Philly Food Ventures and The Insider. One of the best national ones is USNews.com’s best small towns.

Participate in Industry Associations & Trade Events

One of the best tools to help cities grow their retail sector is membership and participation in the International Council of Shopping Centers (ICSC). Communities can take advantage of the great networking possibilities at the ICSC events and by active participation through ICSC social media channels. ICSC events are still one of the most effective ways a community can herald its strengths and market its retail wants and needs and market its strengths.



ICSC offers a variety of conferences and programs to build retail networks and to meet and build relationships with many retail businesses. It is also an excellent means to stay current about trends in the market. The National Convention can be an overwhelming venture for a smaller community as Media, which can accomplish their goals at regional shows such as the Mid-Atlantic Idea Exchange and PA/NJ Deal Making conference. The NY ICSC DEAL Making provides access to many of the same tenants and investors that attend the national show, many whom do not participate in local shows. Its new location at the Javits Center since 2014 resulted in an enhanced level of attendance.

Many communities collaborate with local stakeholders for booth space and on meeting to reduce overhead, and maximize their presence at these shows. Many brokerage firms are happy to designate a table for the local economic team. It provides easy access to decision makers for their clients and makes their booth look well trafficked.

The Independent Retailer Conference is a “pop up conference” within a trade show experience dedicated entirely to the unique lifestyle and responsibilities of indie store owners with a focus on delivering in-store and e-commerce operational insight and expertise that can help independent merchants further succeed in their retail goals.



It is nationally recognized as a unique, trusted destination for retailers to gain valuable insight for their one-of-a-kind businesses. IT is dedicated to delivering indie-style expertise in the areas of store operations, marketing, publicity, merchandising and more.

Cultivate Entrepreneurs

Incubating retail and temporary, shared and transitional spaces are evolving as means to attract new tenants and allow entrepreneurs an opportunity to test a market. Retail incubators are great for launching new retail concepts and gaining a presence in the marketplace, as well as for filling otherwise empty spaces with “retail liveliness” on a temporary basis. Retail incubators are being used by public and private sector landlords to fill empty space and nurture entrepreneurs. These take several forms, but most often provide space where several entrepreneurs can gather under one roof, open a store, learn the basics of retailing and business and eventually graduate into spaces of their own.



Philadelphia has a Fashion Incubator that has cultivated nearly two dozen designers, several who have launched their own businesses. Buffalo is home to a 3,000-square-foot incubator on the first floor of the Ellicott Commons, a mixed-use project that marries lofts, office space and now retail in the downtown. Privately managed, the incubator is home to five or six small retailers, each leasing 500 to 600 sf at considerably reduced rental rates.



Pop-up shops

Pop-up shops are being developed in a variety of shapes and sizes, as well as locations. They can be found in a traditional brick-and-mortar store — as a store-within-a-store — as a standalone kiosk or even via a motorized vehicle, taking the lead from the food truck craze. Consumers expect that the pop-up shopping experience will be unique — different from the average brick-and-mortar visit. Local and national landlords are using temporary tenants to fill vacant space that is in transition or around special events and holidays. The pop-up industry has grown to approximately \$10 billion in sales.²⁵



A.4 MEDIA BUSINESS RECRUITMENT BUSINESS PLAN

Retail recruitment is an especially challenging mission for many communities. One of the greatest hurdles is creating a balance between a community's desires and expectations about

²⁵ PopUp Republic

retail attraction, market perception, and what is economically realistic. It is important that any retail marketing and attraction efforts be market-driven to ensure achievability and sustainability. That said, without vision and aspirations, communities might never reach for or achieve the ultimate retail mix that advances and enhances quality of life to the level desired for all citizens.

The mission of the recruitment strategy is to identify those companies and tenants that match Media's assets and development goals. We have developed guiding principles which are outlined below for retail recruitment. Many of the marketing tools and tactics presented as part of this plan, are intended to support retail attraction and retention efforts.

Guiding Principles for Recruitment

The Guiding Principles are based on the market intelligence, best practices from downtowns around the country, and the local economic development objectives. These consider the retail mix, the real estate, placemaking, and the sustained development of downtown Media. The Guiding Principles for Recruitment will help the borough to realize its goals and provide landlords and tenants a common platform to guide leasing and merchandising.

Allocate storefronts and street facing space along State Street to businesses that draw foot traffic. Those that do not require foot traffic to be successful should be located on side streets and upper floors.

Attract and recruit businesses that serve the residential population but also the daytime population (workforce, visitors) and draw consumers from surrounding communities and fill gaps in the market, including in the secondary trade area.

Focus on businesses that fill the gaps in the current retail market (categories defined above) and those that complement and augment existing ones.

Focus on independent and regional retailers, entrepreneurs and emerging small businesses, rather than national tenants for State Street and adjacent streets. Include those expanding from other markets that would complement the unique mix in Media today.

Encourage all local and independent retailers and entrepreneurs to be proactive about marketing and establish a strong presence through traditional and social media. Retailers in Media have an advantage of being in a market



that is already recognized as a place to dine. The general retail businesses need to build on that momentum.

Direct national tenants and franchisees, including restaurants that have larger space requirements, to more heavily trafficked Baltimore Avenue and outlying parcels.

Be creative, even imaginative, and embrace new concepts. Downtown landlords around the country are embracing temporary and non-traditional tenants. Pop-ups are often done seasonally or to test new concepts on a short-term basis. These can help to maintain a vibrant mix in a downtown market, and to fill vacant space. The tenant would be open on a short-term basis while the space is being marketed.



Embrace Browsing and Window Shopping. The contiguous flow of store fronts and commercial space makes downtown ideal for browsing and window shopping. Encourage tenants to animate and illuminate their storefronts with lighting and regular merchandising displays. Build on existing initiatives. Dining Under the Stars brings a large audience to Media. Though they may not shop on Wednesday nights, great window displays could encourage diners to come back. It would even be more inviting if the businesses were open - if not during these events, then perhaps before.



Media Retail Business Recruitment Plan Action Steps

- Develop a business recruitment team (Mayor, MBA, interested business owners).
- Encourage property owners to participate with the MBA in business recruitment.
- Create essential recruitment tools and make them available on the websites (Collateral with demographics and market info, list of existing business gaps, list of tools available).
- Focus on locally made and sourced products and goods.
- Recruit local entrepreneurs especially those that draw foot traffic (Retail boutiques, professional service firms, creative companies).
- Maintain a list of available and forthcoming properties.
- Ideas for new retailers include:
 - Specialty food store (olive oil, breads cheeses, selective meats).
 - Garden or plant store – locally grown plants (potentially seasonal, i.e. holiday trees during the winter).
 - Restaurant or bar with evening entertainment and live performances. Busboys and Poets in DC is a good example – from coffee and pastries in the morning to a platform for live entertainment and meetings at night (spoken word, readings, local bands and performance) and even offering books for sale (new and used).
 - Missing ethnic foods.
 - Pop-up tenants, such as carts during events.

APPENDIX B: ABOUT THE PROJECT TEAM

Econsult Solutions, Inc. (“ESI”) is a Philadelphia-based economic consulting firm that provides businesses and public policy makers with economic consulting services in urban economics, real estate economics, transportation, public infrastructure, development, public policy and finance, community and neighborhood development, planning, as well as expert witness services for litigation support. Its principals are nationally recognized experts in urban development, real estate, government and public policy, planning, transportation, non-profit management, business strategy and administration, as well as litigation and commercial damages. Staff members have outstanding professional and academic credentials, including active positions at the university level, wide experience at the highest levels of the public policy process and extensive consulting experience.



The Riddle Company, LLC is an economic and real estate development marketing firm based in Washington, DC. The Riddle Company (TRC) provides consulting services in urban economic development, retail and business attraction, and market positioning and promotion. Catherine Timko, the founder, has been providing marketing and retail services to the Center City District and the Philadelphia Retail Marketing Alliance since 2008. She is well acquainted with the local retail market and nuances of the retail merchandise mix in Center City.



JVM STUDIO is a Philadelphia-based urban design practice founded to help cities, towns, and neighborhoods manage change. We connect civic discourse, history, economic forces, geographic context to generate forward looking designs and policies for urban places that reflect best practices, informed decisions, and values-based priorities. By focusing on human scale design, JVM Studio helps communities think big.

