Downtown Ardmore Customer Survey

for

Downtown Ardmore Market Study

Final Survey Findings Report

Conducted by

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Executive Summary

The Ardmore Initiative Inc. (AI) sought consumer feedback about its operation and downtown commercial district as part of a Strategic Planning process. The purpose of the survey was to learn about the consumer preferences for downtown Ardmore and what stores, restaurants, and businesses would make downtown Ardmore more appealing for shoppers.
Marie Suvansin, Assistant Executive Director of the Ardmore Initiative, created an online survey that was short and informative, yet provided enough detailed consumer insights to make suggestions about future activities for the downtown organization. The survey had 29 questions with several text boxes for write-in comments. The Downtown Ardmore Customer Survey was open for about a month from August 31, 2016 to October 4, 2016, using Survey Monkey as the administrator. A press release was sent to the *Main Line Times*.

There were 704 responses. This survey passed the threshold of 385 responses required to accurately represent Ardmore's population of about 12,455.[1] Therefore the survey results are considered a "statistically representative sample size" and can be treated as if 95% of the general population of Lower Merion Township had taken the survey. This information will be useful to both the Ardmore Initiative and business owners in the downtown. Both groups should use this information to make changes in current marketing, business recruitment and retention, and advertising practices.

Summary of the Survey Findings

The survey findings show that Ardmore's greatest strength and identity are rooted as a downtown dining destination. After passing through, the next most frequent purpose for which thirty percent (30%) of nearby residents, walk or drive downtown is to eat lunch or dinner at least weekly. This finding is based on the results that forty-two percent (42%) of all shoppers are from the neighborhood and either drive or walk (43% and 30% respectively) downtown due to its immense walkability.

The survey results formed the basis for the following recommendations:

1. Attract new specialty food stores and restaurants.
2. Continue to make storefronts attractive and inviting.
3. Expand outdoor dining and activities.
4. Improve parking downtown for the forty percent (40%) who reported frequent trouble.
5. Define Ardmore as a unique destination with more music events and increased nightlife.
6. Continue to host family friendly activities for the forty percent (40%) of respondents with children at home.

Many of these recommendations build from the strength of the dining scene downtown. AI should continue to improve the pedestrian and outdoor experience for Ardmore shoppers. If successful, these recommendations could further bolster the economic strength in the area and

[1] *Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates, ZCTA5 19003*

create a foundation for larger and even more ambitious events in the future.

Other recommendations, such as improving storefronts and continuing to find solutions to make parking easier, are the types of ongoing activities necessary for the continued success of any commercial district. Construction and temporary changes in the area may provide an opportunity to explore additional options for parking solutions. Meanwhile, continue to monitor the temporary parking changes and encourage property owners to use the existing storefront improvement program to enhance the pedestrian experience for the many window shoppers downtown.

Who is the Ardmore shopper?

Based on survey results, married women make up three-quarters of shoppers in downtown Ardmore. Sixty percent (60%) of downtown shoppers do not have children at home, while forty percent (40%) do. These survey results are far higher than Ardmore's general population. Finally, Baby Boomers between the ages of 40 and 59 represent almost half of all shoppers downtown.

Inviting storefronts

The Ardmore Initiative's Facade Improvement Grant program, which provides fifty percent (50%) matching grants for up to $5000, is an excellent tool to encourage quality rehabilitation of storefronts in the district. Since inviting shops are highly valued by current shoppers and were identified as an area for improvement, more can be done to encourage property owners who have not yet taken advantage of this incentive. The walkability of downtown also correlates to window shopping, an important activity in downtown. Ardmore stores that put a premium on high quality window displays and visual merchandising will do well given the respondents' propensity to window shop.

Downtown events

The most popular AI events are: Ardmore Restaurant Week (66%), Ardmore Vintage & Antiques Market (58%), Taste of Ardmore (54%), and Ardmore Oktoberfest (54%). Most of these events build on the existing restaurant cluster in downtown and are popular with adults without children. Dining is the number one reason people come downtown. The events with the lowest scores were St. Paddy's Day Pub Crawl (13%) and the Easter Egg Hunt (15%). Given that 40% of survey respondents have children, AI should continue to host family friendly events throughout the year, even if they are not the most popular activities overall.

More outdoor dining was requested along with more nightlife activities, even though it is not a current draw for the area. Despite survey respondents' interest in closing Lancaster Avenue more often for festivals and events, other options could be investigated first. The organization might want to consider expanding outdoor dining options on side streets or on small parts of existing parking lots, perhaps like a "parklet," for special events/retail events organized by the Ardmore Initiative. If successful, these expanded outdoor dining options could be continued on a regular basis.

Travel patterns

Perceptions of the experience for walking downtown are especially important for Ardmore given the large number of people that travel through the area, get there by walking, or visit just to window shop. The most positive perceptions of the area build on its strength of walkability with the top perception being that the area is safe (43% Strongly Agree) and that it is clean (19% Strongly Agree.) However, improvements can still be made as most disagreed with statements that Ardmore has good directional signage (41% Disagreed and Strongly Disagreed) and many felt that there was not enough lighting at night (39% Disagreed and Strongly Disagreed). These improvements in lighting and signage would play a very large role to improve the walking experience that is central to Ardmore's downtown character.

Communications

Word of mouth is the major source (54%) of information for planning all trips downtown. The internet, social media, and the Ardmore Initiative's online resources combine as the second most successful means of communicating for another sixteen percent (16%) of respondents. Continue to develop AI's communication tools using online sources and social media, as they have been successful and still have a large opportunity for growth as a primary source of information about downtown events and promotions.

People came downtown most often for the following activities:

1. Passing Through (69% More than Once a Week)
2. Groceries (29% At Least Once a Week)
3. Eating Out (27% At Least Once a Week)

Eating lunch and dinner were the most common meals that survey respondents consumed in the downtown.

- Dinner: 76% at Least Once a Week
- Lunch: 61% at Least Once a Week

Ardmore is already a dining destination. Survey respondents also eat lunch and breakfast downtown often, but happy hour is less of a draw. Most restaurant users spend less than $20 for lunch, and forty-five percent (45%) spend less than $10. There is a wider spread on dinner spending. The majority (43%) of survey respondents spent between $20 to $30 a person on dinner, a third (30%) spent more than $30 per person on dinner, and a quarter (26%) spent under $20 per person on dinner.

Most requested shops, restaurants and entertainment options

Ardmore shoppers want more food related business in downtown. Our survey asked: what kinds of stores would you like to see downtown? The top five responses were:

1. Restaurants/bars 229 responses

2. Clothes/Shoes/Department store 92 responses
    - 28 - Department Store
    - 25 - Boutique
    - 17 - Unspecified
    - 9 - Thrift
    - 6 - Sporting Goods
    - 6 - Shoes
3. Coffee shop 89 responses
4. Movie theater 44 responses
5. Bakery 41 responses

Current Ardmore shoppers would visit downtown more often if these following shops were available. Below is the list with more than fifty percent (50%) responding they would visit downtown if these stores were available.

- Specialty food store 80%
- Book store 75%
- Bakery 70%
- Clothing stores 69%
- Grocery 62%
- Furniture/housewares 52%

Current Ardmore shoppers would visit more often if these entertainment venues were available:

- Movie theater 84%
- Performing arts center 64%
- Family entertainment place 64%
- Nightclubs/bars 43%
- Co-op artist's studio and space 42%

Food related shops (bakery, specialty grocery, and a grocery store) as well as more bars and restaurants would do well in Ardmore based on current shopper's preferences. Also popular were more clothing stores (not specific about whether for men, women, or kids), shoes, and a department store, most likely to replace Macy's in Suburban Square. Bars and nightlife, especially movies, were highly regarded by current shoppers. This list represents the businesses that the AI business recruitment team should prioritize over the next few years.

Mom and pop shops

Shopping is still the second highest reason for visiting downtown, while dining is first. Ardmore shoppers value a unique and diverse shopping environment, and prefer small independent shops rather than chain type stores. Specialty stores rated highly with eighty-two percent (82%) of the survey respondents. We encourage the Ardmore Initiative to focus its Business Assistance Grant program to attract more independently owned stores such as those shops listed above.

How to use this report

These survey findings provide fresh information from and about current shoppers. This information will be useful to the Ardmore Initiative and the business owners in the commercial district. This survey and the resulting findings report are only helpful if they are employed by the Ardmore Initiative and local merchants to make changes in current marketing, business recruitment and retention, and advertising practices. We encourage the Ardmore Initiative to circulate this report widely and explain its significance to retailers and restaurateurs in the district.

Section 2

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Perceptions

Shopping

Dining

Events, Shopping, & Services

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Introduction

Overview

As part of its Strategic Planning process, the Ardmore Initiative (AI) wished to gain consumer feedback about its operation and the downtown district of Ardmore. The purpose of the survey was to learn about downtown consumer preferences and what stores, restaurants, and businesses would make downtown Ardmore more appealing for shoppers. Marie Suvansin, Assistant Executive Director of the Ardmore Initiative, created a 29-question online survey that was short and informative yet provided enough detailed consumer insights to make suggestions about future activities for the downtown organization. This findings report was written by Stephen Skilton and Donna Ann Harris of Heritage Consulting Inc., the consultants engaged to help the Ardmore Initiative Board to create their new five-year Strategic Plan.

The Downtown Ardmore Customer Survey Report was available online via Survey Monkey for about a month from August 31, 2016 to October 4, 2016. The survey link was sent to the organization's large e-mail list and the link was posted on the organization's Facebook page several times. A press release was also distributed regarding the survey. Postings about the survey on Facebook generated the most responses. Other outlets were helpful in gaining participants including Patch, the *Main Line Times*, Black Ministers Alliance, Lower Merion Township emails, and the North Ardmore Civic Association email lists.

The survey had 29 questions with several text boxes for write-in comments. A $50 Downtown Ardmore gift card was awarded weekly during the survey period to encourage survey participation. Random winners were chosen during the survey period.

All this timely publicity generated 704 responses, an impressive result and a statistically valid sample. Since more than 385 people answered the survey, the survey results are considered a "statistically representative sample size." This means that the survey results are accurate as if 95% of the general population of Lower Merion Township had taken the survey.

These findings should be considered seriously as high quality intelligence as well as fresh information about current downtown Ardmore shoppers. This information will be useful to both the Ardmore Initiative and to business owners downtown. Both groups should use this information to make changes in current marketing, business recruitment and retention, and advertising practices.

How this report is organized

The report is organized into two sections.

The first portion of the Downtown Ardmore Customer Survey Report provides an Executive Summary, our recommendations, and a summary and analysis of the 29 survey questions. They are organized by theme rather than in numerical order. This was done to make it easier to group together related questions for analysis and to understand the relations between several questions that can provide a more complete picture of consumer behavior patterns.

We decided to group together the Location and Travel Questions because they relate to where survey respondents live and work, how they travel downtown, and their parking habits. Grouping these questions together provides a broader picture of the daily travel patterns of Ardmore shoppers. By grouping questions together, we learned that most people shopping downtown also live nearby. This is strongly related to the survey responses where people reported that they get downtown by walking.

The second section of this Survey Report contains three appendices at the end, which show specific breakdowns of individual comments and answers. Appendices A and B show the original graphs and table outputs of specific responses as they originally appeared in the Survey Monkey results. These are meant as a record of all the survey responses. Appendix C provides all the answers from the open-ended questions and shows the specific comments that were organized along particular themes. These appendices supply ALL the actual comments made by survey participants and they have not been altered in any way, except to correct obvious spelling errors.

Towns in the area such as Narberth and Wayne scored very highly as popular destinations besides Ardmore and have similar reduced speeds on major roadways. Those who visit most frequently are passing through.

Recommendations

Who shops downtown Ardmore?

The key demographic for which Ardmore should continue to target its programming activities and business recruitment work are married women between the ages of 30 and 59, who make up two thirds (66%) of current downtown Ardmore shoppers per ages given in survey responses. Another twenty-one percent (21%) of local shoppers are married women 60-69 years of age. The 2010 census information says that this age group represents only eight percent (8%) of the Ardmore population. This is significant because this older group of Baby Boomers (commonly determined as those born between 1945 and 1964, who are between 51 and 71 today) shop downtown often; they represent forty percent (40%) of all shoppers downtown.

Given the demographics of survey respondents, we are recommending that the organization's events and activities should be balanced between the sixty percent (60%) of women shoppers without children and the forty percent (40%) of those who do have children in their homes. We make suggestions about this later in this report.

Ardmore should continue to build on the strengths that currently define the area and make it appealing to current shoppers. Three qualities that help define and shape downtown are:

- Culture (70% of those questioned said that they would attend more cultural events downtown)
- Community (42% of those that visit downtown live nearby in Ardmore)
- Walkability (30% of all shoppers walk downtown from their homes)

These stats are important because they show how deeply downtown is centered at the heart of the community. Many of the shoppers (42%) are also a part of the community and live nearby. They are personally invested in the well-being of downtown, but also have an interest in participating in events with those around them. When those in the community do travel downtown, they walk (30%), which also adds to the sense of the neighborhood and speaks to the scale and appeal of the environment downtown. These factors combine to create a sense of pride and culture in Ardmore and foster the desire to have a home that is unique among others nearby. It would be wise to grow new programs and events that continue to build a unique cultural identity for the area.

Inviting storefronts

Survey respondents highly value inviting storefronts that are both interesting and friendly to view. Many (69%) of downtown Ardmore shoppers walk by or pass through the area daily, per the survey. The atmosphere of downtown Ardmore is a great strength. The words "quaint," "home," and "friendly" were the top results from the write-in question asking for three words to describe Ardmore today, as well as Question 26. Maintaining the character of downtown, its buildings, sidewalks, and open spaces is critical to reinforcing the atmosphere of downtown. The walkability of downtown also correlates to window shopping, which is an important activity in downtown. Ardmore stores that put a premium on high quality window displays and visual merchandising will do well given the survey respondents' propensity to window shop.

The Ardmore Initiative's Facade Improvement Grant program, which for the past twenty years has been providing a fifty percent (50%) matching reimbursement grant of up to $5,000, is an excellent tool to encourage high quality rehabilitation of storefronts in the district. Since inviting storefronts are highly valued by current shoppers, more can be done to encourage property owners who have not yet taken advantage of this incentive.

Another way to ensure attractive storefronts is to balance the presence of window posters with visibility inside the store. Survey respondents noted that window posters were a highly effective method to market and reach customers in downtown, especially those of younger demographics. It is important that posters and advertisements do not block more than twenty percent (20%) of transparent windows and doors facing the street to maintain the attractiveness of storefronts. Finally, eighty-nine percent (89%) of survey respondents agreed that cleanliness and convenient hours were important to them and that downtown Ardmore had those attributes now. Good places to eat scored high also, with close to eighty-percent (80%) saying this was an important downtown attribute.

Dining and spending

Dining is already the most successful commercial category downtown, with eighty percent (80%) of survey respondents coming downtown for dinner once a week. This is an extraordinarily high percentage of people visiting the various types of restaurants in downtown. Survey respondents also eat lunch and breakfast downtown often, but happy hour is less of a draw. The clear majority of restaurant users spend less than $20 for lunch, which is to be expected. There is a wider spread on dinner spending, with the majority (43%) spending between $20 to $30 on that meal, a third (30%) spending more than $30 per person on dinner, and a quarter (26%) spending under $20 per person on dinner. This information should be shared with current restaurants so they can adjust their pricing as needed. This up to date information is also important for restaurant recruitment purposes and should be included in any marketing packet produced by AI.

Food related events

Since the survey respondents are already downtown once a week eating dinner, the downtown organization is reinforcing downtown's strength with its food related special events throughout the year. The most successful downtown events were Ardmore Restaurant Week, Taste of Ardmore, and Oktoberfest, which made up three of the top four events in Question 23. Ardmore can build on this strength by continuing to expand outdoor dining options, which was the second most common suggestion by survey respondents.

Outdoor events popular

In the open-ended question asking what activities people would like to see, there were sixteen survey respondents (10% of the 174 categorized responses) who expressed a desire to close

Lancaster Avenue for dining or for large festivals. Lancaster Avenue is a state highway and the major thoroughfare through all of Lower Merion Township. Closing this major spine for events has many implications for residents inconvenienced by a street closure, downtown merchants who depend on daily traffic, and emergency vehicles.

Above: Example of parklet design and placement.
Photo Credit: nacto.org

Despite survey respondent's interest in closing Lancaster Avenue more often for festivals and events, other options could be investigated first. The organization might want to consider expanding outdoor dining options on side streets or on small parts of existing parking lots, perhaps like a "parklet," for special events/retail events organized by the Ardmore Initiative. Parklets are reclaimed parking spaces, often only two or three spaces, that are made into small parks or dining areas. Parklets could be added strategically in place of street parking in specific areas to create additional seating outdoors along sidewalks, either seasonally or for a limited period during an event.

Outdoor dining was even more popular of a recommendation in the same survey question (from 20 participants, the second highest response) than closing Lancaster Avenue for large events. If successful, these expanded outdoor dining options could be continued on a regular basis. More opportunities for outdoor dining options could create a more interesting vibe, improve walkability, and boost economic activity for restaurants during lunch and dinner hours, which were reported as frequent activities for current shoppers.

To continue to make the outdoors appealing downtown and improve the pedestrian experience and safety, it may also be worth exploring changing traffic patterns. Reducing the speed limit to 25 mph may make downtown more quiet and walkable. Towns in the area such as Narberth and Wayne scored very highly as popular destinations besides Ardmore and have similar reduced speeds on major roadways.

Nightlife

Survey respondents noted that Ardmore's nightlife is not currently a draw for the area, and that respondents desired more improvements in the area's nightlife. As evidence of the lack of nightlife, the AI event St. Paddy's Day Pub Crawl ranked lowest among Ardmore events (13%). However, this is partly since this event is attractive to just a very specific age group, those in their 20s, which are represented as a smaller share of the population in the area. When considering this figure more closely, forty-three percent (43%) of those 21-29 attended. The numbers dropped significantly for those 30-39, with only eighteen percent (18%) of people within that age group responding yes.

In addition, happy hour attendance was the lowest among dining times (21% at least weekly). Happy hours depend heavily on a younger demographic: those in their 20s and 30s. This age group makes up a third (31%) [2] of the population for Ardmore's 19003 zip code area and twenty-nine percent (29%) of those surveyed.

More music

When looking at new events for the area, the top write-in response with 70 comments was for more music events. Combined with the existing music venues and shops downtown, there is potential to continue to build upon music as a unique cultural asset for Ardmore. Promoting events that fill bars and restaurants as well as outdoor events could contribute to the culture and reinforce downtown Ardmore as an interesting destination for those who live outside of the immediate area.

Since there was considerable support from survey respondents interested in having more bars, wine tastings, and other nightlife attractions (most recommended with thirty-eight percent (38%) in Question 18, supported by forty-four percent (44%) in Question 16), the organization must determine if bars and nightlife is a business cluster they wish to attract to downtown Ardmore.

Family friendly events

The Ardmore Initiative board and staff should continue to develop events that are geared towards children, given that there is a 40 /60 split of survey respondents with children and without children in their homes.

The highly-rated dining events, such as Restaurant Week (66%) and Taste of Ardmore (57%), are geared to adults without children. The organization's more family friendly holiday events, such as Santa's Arrival (28%) and Halloween Spooktacular (28%), scored lower and were less heavily attended overall. Attendance and interest was higher at rates of 39% and 37% respectively when looking at 'yes' responses just within the families with children. The organization should revisit all the family friendly events and perhaps do some small event surveys to indicate how these activities can better serve this important audience.

Most requested shops, restaurants, entertainment options

Ardmore shoppers want more food related businesses downtown. Question 18 asked, "What kinds of stores or eateries would you like to see in downtown Ardmore? Are there shops in other towns that you think would do well in downtown Ardmore? Please be specific." The top five responses were:

- 225 Restaurants / Bars
- 92 Clothing / Shoes / Dept. Store
- 89 Coffee Shop

[2] *Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates, ZCTA5 19003*

- 44 Movies
- 41 Bakery

Question 15 asked, “Would you visit Ardmore more often if it had more of these shops?” The following earned the highest votes:

- Specialty food store 80%
- Book store 75%
- Bakery 70%
- Clothing stores 69%
- Grocery 62%
- Furniture housewares 52%

Question 16 asked, “Would you visit Ardmore more often if it had the following venues?” The top five responses were:

- Movie theater 84%
- Performing arts center 64%
- Family entertainment place 64%
- Nightclub/bars 43%
- Coop artist’s studio and space 42%

These requests make it clear that food related shops (bakery, specialty grocery, and a grocery store) as well as more bars and restaurants would do well in Ardmore based on the current shopper’s preferences. Also popular were more clothing stores (not specific about whether for men, women, or kids), shoes, and a department store, most likely to replace Macy’s in Suburban Square. Bars and nightlife venues, especially movies, were highly requested. This combined list represents the marching orders for the AI’s business recruitment team in the next few years.

Mom and pop stores

Shopping is still the second highest reason for visiting downtown. Only eight percent (8%) of those questioned said they shopped both downtown and at the mall (unspecified). Ardmore shoppers valued unique and diverse shopping environments. Based on the aversion to mall shopping, this indicates a preference for small independent non-chain stores. This is reinforced by the preference for more specialty stores in the area by eighty-two percent (82%) of survey respondents. We encourage the Ardmore Initiative to focus its $25,000 Business Assistance Grant program on attracting more independently owned shops, such as the most highly requested stores listed above.

Parking

The ability to park easily is a vital component to the success of Ardmore’s commercial downtown. Although respondents were split with forty percent (40%) having trouble with parking downtown and sixty percent (60%) easily finding parking, not a single write-in comment referenced parking in Ardmore as being easy. With significant construction beginning in

Suburban Square to triple its parking capacity and a parking expansion underway at Trader Joe's, Lower Merion Township has proposed temporary changes to permit on-street parking.[3] These temporary changes could be used for a limited time as a pilot program after construction is completed to evaluate the level of support from the community for keeping any of the changes to help businesses.

Ardmore as a unique destination

When respondents were asked to compare Ardmore to other areas, the third highest-rated response was that they did not want to compare their town to others but rather wanted to continue building Ardmore's unique identity. While restoring a movie theater in the area would allow Ardmore to compete with other areas commonly mentioned in comparison, such as Wayne, there are other options available. A performing arts center with programming that catered both to older patrons who prefer performing arts events at night might do well in Ardmore based on survey respondent's comments. These facilities could also be used for family entertainment events to appeal to younger demographics and make a unique contribution to the community.

Some of the most frequently referenced towns in the comparison exercise are like Ardmore and others are distinctly unique. Wayne and Narberth were two of the top towns and are very similar. They are in a nearby location with a similar layout and feel. However, both have movie theaters, ice cream shops, low speed limits, and popular coffee shops, such as the Gryphon in Wayne. The other top places are Media and Chestnut Hill. These towns have a similar physical characteristic to Ardmore, but different attractions, such as the Dining Under the Stars event in Media. Ardmore can incorporate some of the strengths of nearby Main Line towns, such as quieter traffic patterns and coffee shops. However, its long-term goal could be to create a shopping district character that is uniquely Ardmore.

Marketing tools that work

Local businesses should also be made aware of the effectiveness of various marketing tools in the area. Word of mouth (49%) and experience (11% derived from 'Other') were the most commonly reported sources. The following top sources, social media and Destination Ardmore's Facebook and web pages (18%), were the most effective tools for communications with current Ardmore shoppers. Understanding how to effectively advertise in the *Main Line Times* (7%) and *Main Line Today* (1%) also helps businesses reach certain customers.

Make this report widely available

We suggest making this survey finding report available online and making copies for local merchants. It would also be productive to host small gatherings of merchants and other local

[3] *Source: http://www.bizjournals.com/philadelphia/news/2016/08/25/ardmore-suburban-square-parking-trader-joes-cre.html 03*

officials to explain the results. These steps would ensure that this valuable information about consumer preferences for downtown are understood and used to increase store and restaurant profitability.

Section 2

Demographic Questions

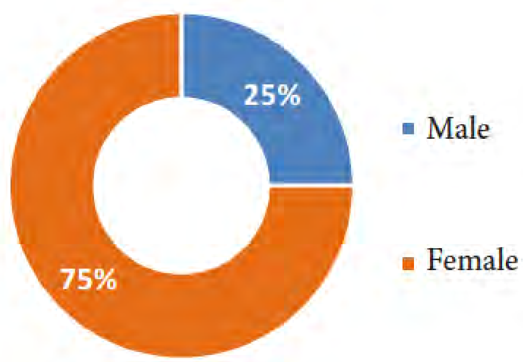
Demographic Questions

Demographic Summary

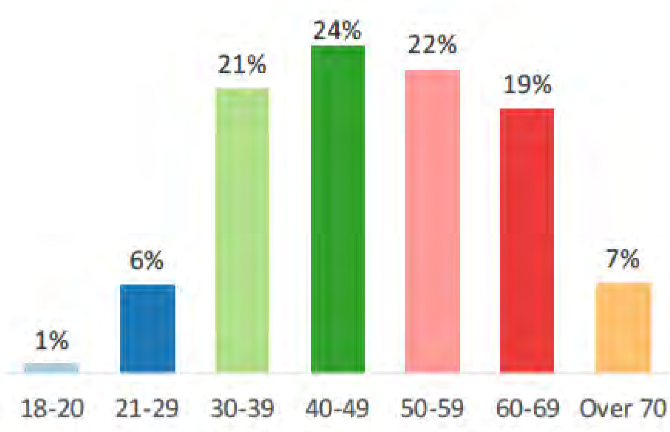
The largest among the various demographic groups surveyed are women (75%), married (also 75%), between the ages of 30 and 69 (86%), white (91%) and with either no children (58%) or one or two children (35%).

The groups of women, married persons, and those without children are all represented to a much higher proportion than Ardmore's population. Many of the shopping, dining, and entertainment preferences also follow from this profile. Future marketing and improvements should keep in mind these groups, which are most attracted by Ardmore's amenities.

Question 1. What is your gender?



Question 2. Which category includes your age?



Gender

Three quarters of the respondents were female, which is significantly higher than the fifty-two percent (52%) share of women that make up the total population in Ardmore's 19003 zip code[4].

Age

The median age of survey respondents matches Ardmore's median age of 37.6 years. However, when compared to the most recent census data from the American Community Survey (ACS), our survey results represent less of the youngest (below 30) and oldest residents (over 70) of Ardmore's

[4] *ACS DEMOGRAPHIC AND HOUSING ESTIMATES 2011-2015 American Community Survey 5-Year Estimates, ZCTA5 19003*

population.

Senior residents in their 60s represent about twice the share of their overall population. In our survey, nineteen percent (19%) of respondents participated, but this population group is just nine percent (9%) overall share of the population per the ACS.

The age groups for respondents from 30 to 60 was like the census, ranging from twenty-one percent to twenty-four percent (21-24%.) The ACS lists the population for these age groups from 30 to 60 from twelve percent to fourteen percent (12-14%) each. When accounting for the lack of representation of individuals up to age 30 in our survey, this share appears comparatively representational to the broader demographics. Baby Boomers between the ages of 40 and 59 represent almost half (46%) of all shoppers downtown per the survey responses.

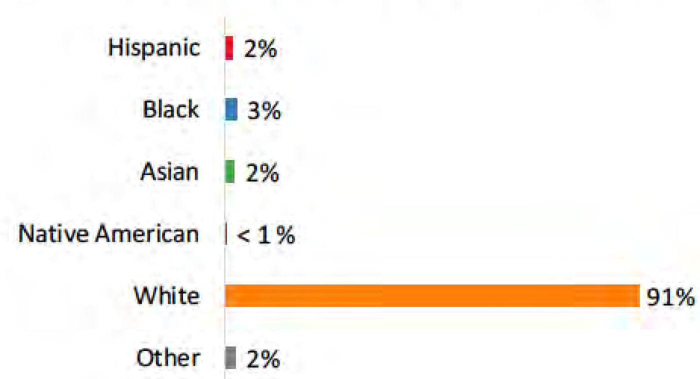
Question 3. What is your Marital Status?

Single, Never Married:	13%
Married or Domestic Partnership:	75%
Widowed:	3%
Divorced:	9%

Marital Status

Married couples represent just forty-six percent (46%) of the population in Ardmore. By contrast with the general population, three-quarters (75%) of the respondents indicated that they are married or in a domestic partnership.

Question 4. What is your racial or ethnic identity?



The *combination* of the larger proportion of married persons along with the greater share of women and an age mostly above 30 should guide the focus and determine the target audience for marketing and events in the area.

Race & Ethnic Identity

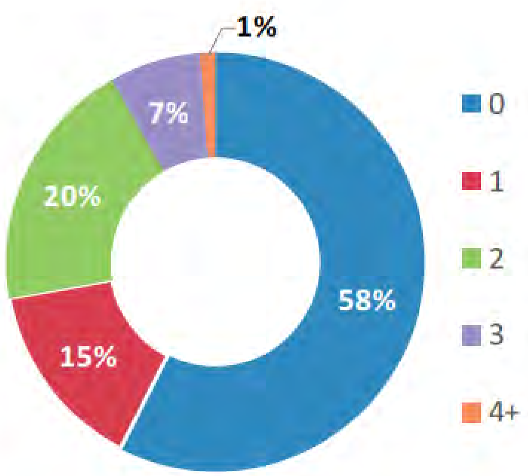
Ninety-one percent (91%) of survey respondents that identified as white compared to the overall white population of eighty-one percent (81%) in Ardmore.[5] This coincides with home zip code patterns on the following page, which indicates that most of those who shop in Ardmore live outside of Philadelphia in some of the city's more homogeneous suburbs.

Race and geography also have a close correlation in Philadelphia's suburbs. These survey responses indicate that the home zip codes seen in the following section are very likely only

[5]*ACS DEMOGRAPHIC AND HOUSING ESTIMATES 2011-2015* [6]*American Community Survey 5-Year Estimates, ZCTA5 19003*

representative of certain portions of those zip code areas (mostly suburban) and specific income levels. So, although a zip code may be more diverse, the shopper demographics indicate that Ardmore is only drawing from specific areas within those zip codes that are more homogeneous.

Question 7. How many children age 17 or younger live in your household?



Children

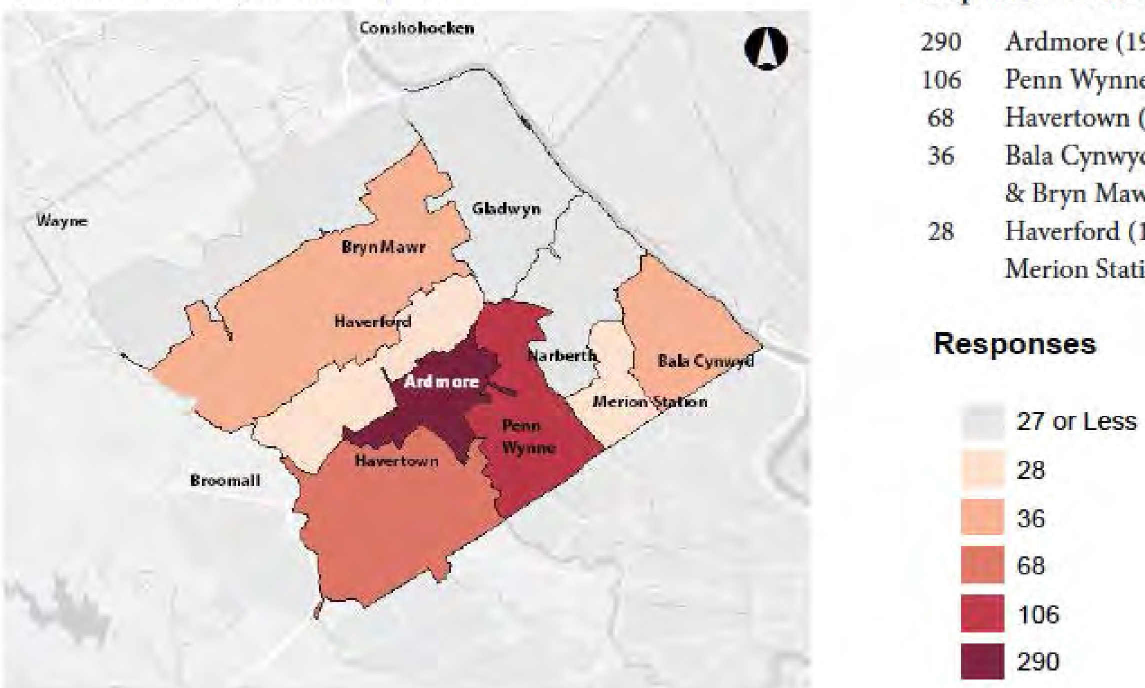
A smaller share of those surveyed had no children: fifty-eight percent (58%) compared to seventy percent (70%) per the ACS[6]. This indicates that the shopping area in Ardmore is more attractive proportionately to people without children when compared to the overall population.

Marketing programs should consider what factors make Ardmore more attractive to families without children, in contrast to other commercial areas that would be specifically attractive to families with kids. The types of stores, restaurants, and housing nearby very likely play a role in this demographic.

The type of programming planned should reflect proportions represented in the survey. We suggest that forty percent (40%) of programs should have children's components and sixty percent (60%) can forgo this aspect.

Location and Travel Questions

Question 5. What is your home zip code?



# Responses	Home Zip Code
290	Ardmore (19003)
106	Penn Wynne (19096)
68	Havertown (19083)
36	Bala Cynwyd (19004), & Bryn Mawr (19010)
28	Haverford (19041), & Merion Station (19066)

Home Zip Code

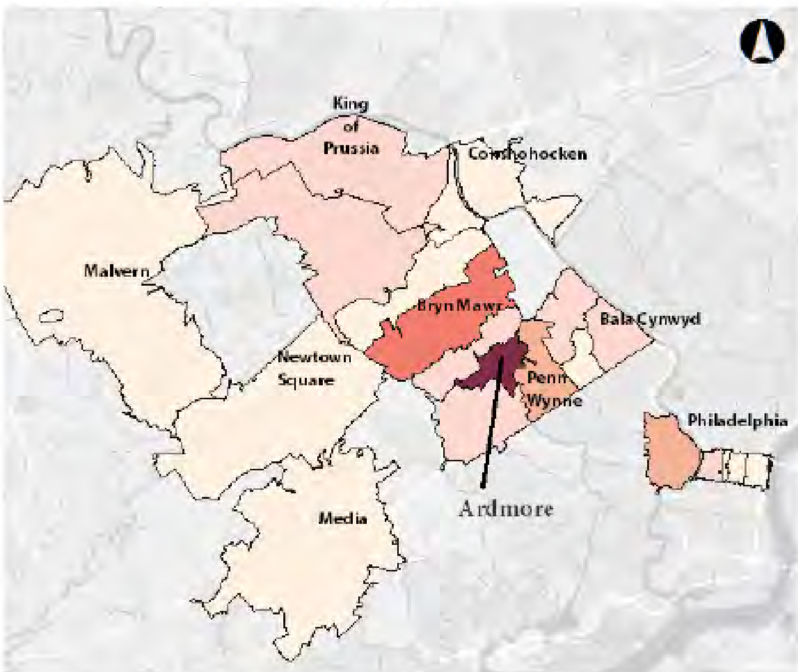
Ardmore is mostly a destination for people who are local. All the 704 respondents live outside of Philadelphia in the suburbs immediately surrounding Ardmore. Ardmore's zip code (19003) was the most common result, comprising forty-two percent (42%) of those surveyed. The second two most popular zip codes are just outside of Ardmore in Penn Wynne and Havertown, comprising of another 29% of all respondents.

The pattern of travel method includes a significant number of pedestrians per the responses to the question on travel. This not only correlates with the living pattern, but also describes how walkable the neighborhood and downtown area is and, as such, how the commercial corridor is an integrated component of the entire community. Many people also drive to and park in downtown Ardmore, and by comparison fewer come downtown via train.

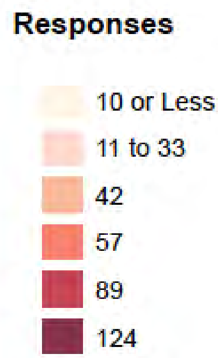
One of the key themes from Question 26 was that several people answered that they preferred towns with a "community feel." Given that most people who go downtown are from the community, there is likely an opportunity to program events that are specifically geared towards building community and drawing people from within the area.

If Ardmore did want to focus on increasing its appeal to folks in Philadelphia or even further away, it would need to promote changes in event programming, types of retail, and branding. This could be done by changing the retail to focus on goods that people are willing to travel farther distances to obtain or concentrating on filling a cultural niche, such as music. A greater focus on destination retail could be used in this scenario.

Question 6. What is your work zip code?



# Responses	Work Zip Code
124	Ardmore (19003)
89	Philadelphia
57	Bryn Mawr (19010)
42	Penn Wynne (19096)
33	Bala Cynwyd (19004)



Work Zip Code

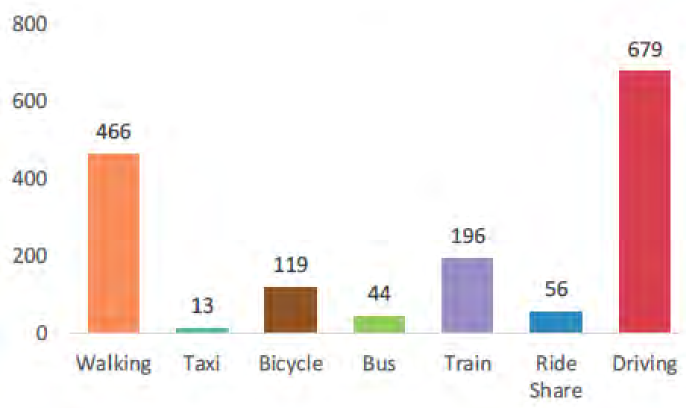
The geographic reach of work locations is much broader than the home locations. This region includes Philadelphia and as far west as Frazer and Malvern. Ardmore's 19003 zip code still represents the largest share with twenty percent (20%), but the combined zip codes for Philadelphia represent fifteen percent (15%) of those surveyed. The next two most common work locations are Bryn Mawr and Penn Wynne, combining for another fifteen percent (15%) of responses.

It should be noted that there is possibly a trend between work zip codes and the health industry. The top three zip codes after Ardmore refer to locations that have Bryn Mawr, Lankenau, and University of Pennsylvania hospitals. If the trend is related to these hospitals, then there may be a large subset of shoppers that work within the health industry.

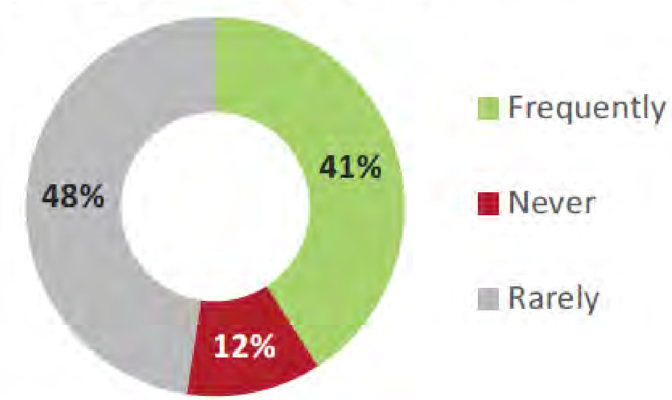
Another notable trend is that Philadelphia consists of a large percentage coming in second after Ardmore's immediate vicinity. It is possible that a much larger share of these residents travel by train to work, than the smaller share of those surveyed who reported taking the train to get to downtown Ardmore. Development around the train stations should cater to those commuting to work, who leave in the morning and return in the evenings.

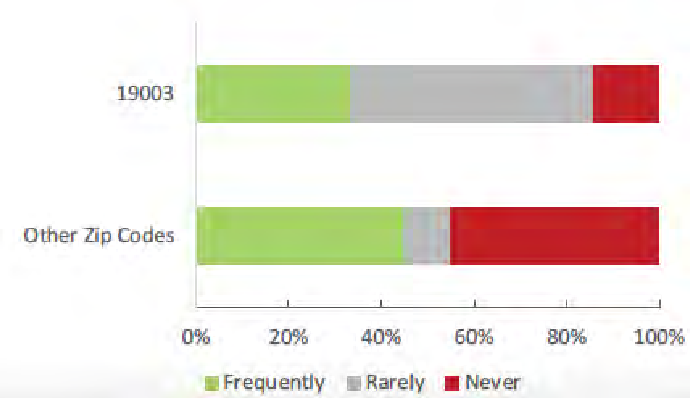
Additional attention could be paid to traffic patterns that would be affected by this pattern of work.

Question 10. Please check all the ways you travel to and from Downtown Ardmore.



Question 22. Do you ever experience difficulty parking in Downtown Ardmore?





Modes of Travel to Ardmore

Driving and walking account for most modes of travel to Ardmore. The large share of people who walk (30%) indicates how many people are local to the area and its level of walkability. The third most popular mode of travel is by train, which accounts for thirteen percent (13%) of the people surveyed.

If you combine the number of people who travel by train and those who walk, the total is the same as the number of drivers (43%). This indicates that walkability, either from the surrounding neighborhoods or from the train station, is a key factor for shoppers and diners in Ardmore. In fact, several shoppers reported in Question 14 that they often visit downtown just to walk and window shop.

As mentioned in the previous section, it should be noted that there is a connection between travel patterns and where people surveyed live. Since most of the people surveyed live near Ardmore, it makes sense that driving and walking are the most common modes, with transit by train or bus being less common. However, it is equally important to mention that the most frequent purpose for visiting downtown is just to travel through.

Parking

Of the forty-three percent (43%) of the people who drive to Ardmore, they are evenly split between those who are able to easily park (60% combined) and those who frequently have trouble (40%) finding a place to park. Although the responses were evenly split for finding parking, open-ended comments regarding parking were universally negative.

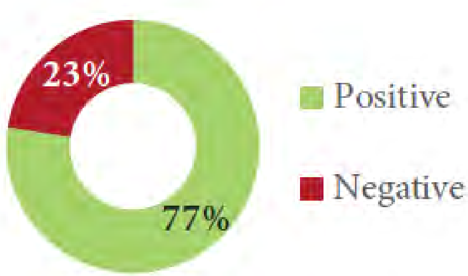
When breaking down parking patterns by zip code, the same pattern appears for people living in Ardmore's 19003 zip code as well as those outside of this area. So, parking is equally easy or difficult both for the residents of Ardmore and those visiting downtown. However, several respondents in 19003 also replied with not applicable (N/A), most likely because they walk to get downtown.

As can be expected, parking arose in several open-ended comments as an important factor in determining other areas people generally liked to visit as well. Easy parking is a vital component to a successful commercial district. Those that had difficulty parking also mentioned it as a concern in their responses to other questions, which naturally indicates that the parking question holds more significance than the yes/no answers given here.

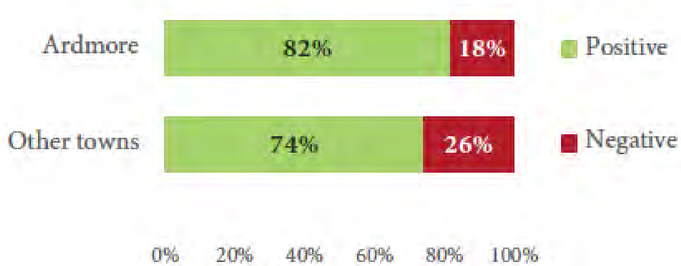
Perceptions

Question 8. What are the first three words or phrases that come to mind when you think of Ardmore?

Responses Classified by Sentiment



By Home Zip Code



Descriptive Words

The top results from Question 8, shown to the right, focused on "home," "shopping," and "walkable." Other key words that arose as themes in Question 26 were "quaint," "parking," "traffic," and "friendly."

The results were analyzed through the creation of a word cloud that represents the most common words used in responses. This analysis was done by running the comments through statistical software, which removes "stop words,"[7] like the methods used in online Search Queries. The remaining significant words were tallied and organized into the word cloud to the right.

Shopping seems like an obvious response since downtown Ardmore is a commercial corridor. Several residents in Question 14 replied that they often come downtown to window shop. (These results were grouped within the walk category.)

Walkable was the second most common response in the overall perceptions of Ardmore. In the previous Question 10, walking was the second most common mode of getting downtown. In later sections, several of the replies stressed the role of Ardmore as a place to just walk around. The success of Ardmore's downtown and community is likely to be tied to how pleasant and easy it is to walk around, either for shopping or just to get out in the community.

Home was the third most common phrase, which at once corresponds with the popularity of walking and the home zip code responses. A large draw for downtown Ardmore is its character as a place to go near home, and residents have a strong desire to tie downtown to a sense of community.

The next most common phrases relate to positive and negative comments that were received about Ardmore and other preferred towns. These statistics were compiled by manually reviewing each comment and characterizing each as positive or negative.

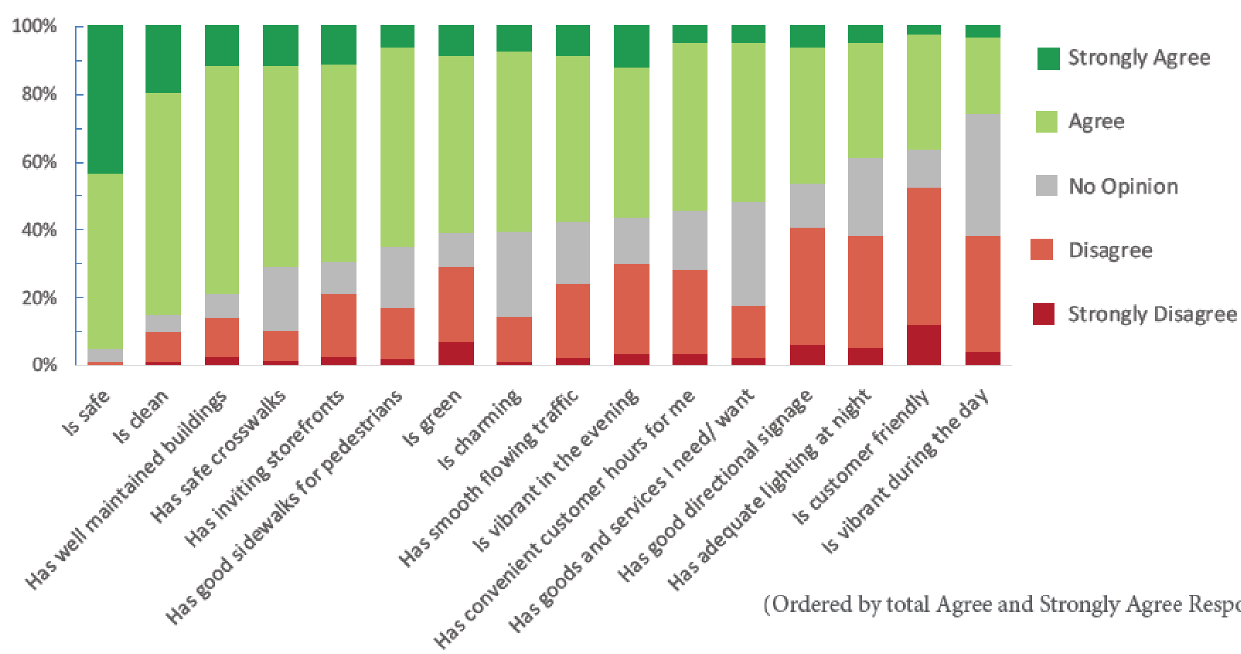
People placed a large emphasis on towns that were friendly, small, and quaint. People strongly preferred places that had easy parking, and some complained about difficulty finding parking in Ardmore. In Question 26 (See Appendix C) many residents preferred towns with traffic that was quieter and more calm. They also requested festivals in Ardmore that would require closing Lancaster Avenue.

Downtown Perceptions

The best qualities that respondents associate with downtown Ardmore is that it is safe, clean, has nice buildings and storefronts, and has safe crosswalks. These same themes scored very highly in importance when respondents were asked what they liked best about other towns. Based on these results, it can be assumed that downtown Ardmore already has some of the most important qualities necessary for a successful commercial corridor. However, customer friendliness and vibrancy scored low.

Overall, the survey results were also in the positive with more than fifty percent (50%) of respondents agreeing with three-quarters of the qualities surveyed. Even items ranking lower than others agreed that the area had convenient hours and adequate lighting.

Question 9. What are your perceptions of Downtown Ardmore?



(Ordered by total Agree and Strongly Agree Responses)

Answer Options	Agreement Rate	Satisfaction Rate
Is safe	99%	81%
Is clean	89%	69%
Is vibrant during the day	87%	66%
Is vibrant in the evening	84%	64%
Has convenient customer hours	80%	63%
Is charming	79%	61%
Has good directional signage	76%	62%
Has inviting storefronts	74%	59%
Has safe crosswalks	70%	59%
Has smooth flowing traffic	67%	56%
Has adequate lighting at night	65%	56%
Has good sidewalks for ped.	65%	58%
Has goods and services I need	53%	51%
Has well maintained buildings	50%	49%
Is green	41%	43%
Is customer friendly	40%	46%

Many people said that Ardmore was not customer friendly, was not vibrant during the day, and did not have good directional signage or lighting at night. Investments could be made by the community to improve signage to make it easier to find areas of interest and parking, as well as to improve lighting. If additional outdoor dining was successfully expanded, this could add to the vibrancy in the area.

The lowest scoring agreement rate fell under whether Ardmore was customer friendly. More research is needed to determine exactly what current customers mean when they say downtown is not customer friendly. The survey results for this question should be shared with businesses so that they can focus on hospitality activities to improve customer perceptions in this area.

Valued Qualities

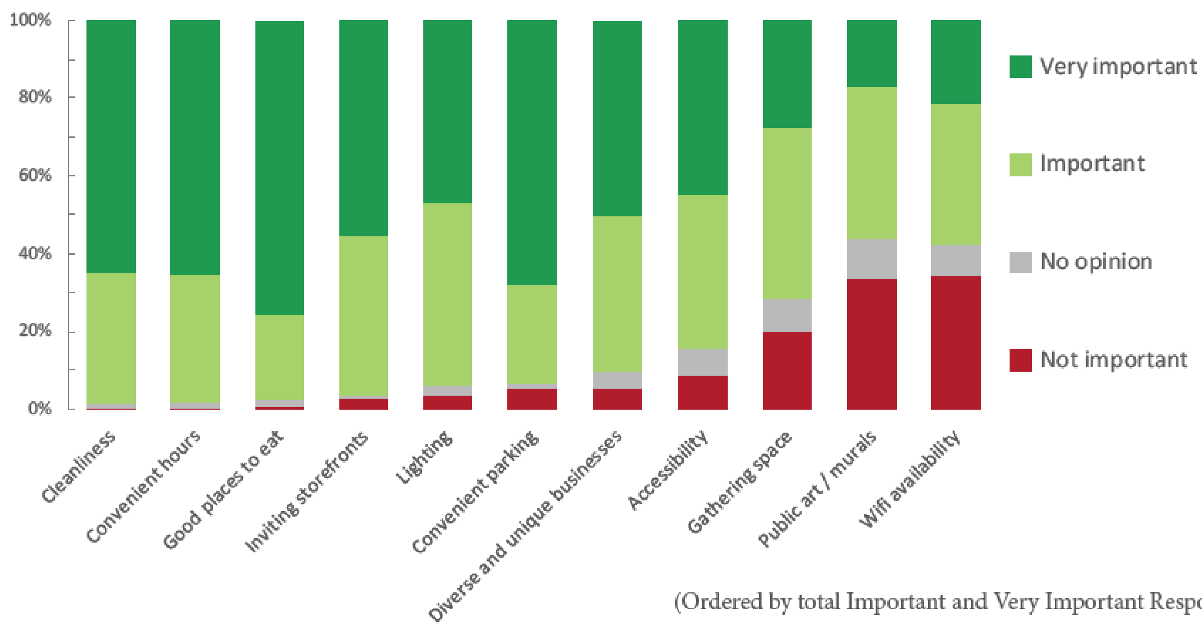
Of the most important values, cleanliness and convenient hours scored highly in importance and as qualities that people associate with Ardmore in the previous question. Inviting storefronts scored as an important value but scored in the middle on people's perception in Ardmore.

The two qualities that ranked the highest as "Very Important" were parking and good places to eat. In the comments of later questions, many people had opinions about the various types of restaurants that they would like to see added downtown. Parking was also a continuous trend throughout the survey.

It should be noted that people ranked gathering spaces as the least important qualities. However, many people did want to see more festivals, street fairs, and other events in Ardmore. So, by themselves, gathering spaces are not valued, but the events that these spaces could be used for were stressed in other responses.

Public art and murals is another value that scored low. However, the indirect benefits of art and murals, such as creating a vibe or culture and community feel, are qualities that are important to the people surveyed. These qualities can be created through art.

Question 21. What do you value most in a shopping environment?



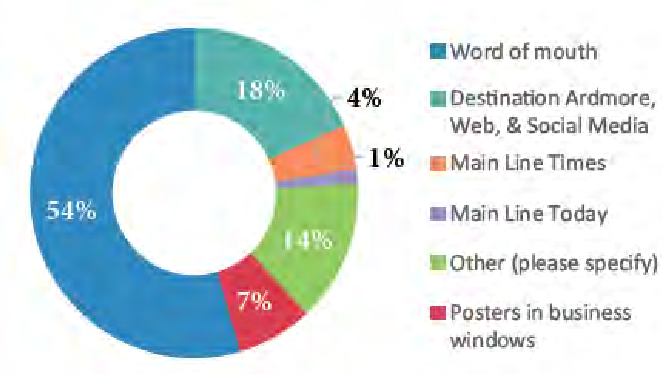
(Ordered by total Important and Very Important Responses)

The lack of interest in Wi-Fi availability is probably correlated with the pattern of shoppers that overall come from the immediate neighborhoods. If more shoppers were to travel from out of the area and farther distances, then perhaps Wi-Fi would increase in importance. It may also be assumed that Wi-Fi is important to specific shoppers in certain spaces, such as coffee shops where its availability is assumed.

Overall, all the qualities surveyed were identified as important by more than half of the responses. Even those areas that scored the lowest, public art and Wi-Fi, still were identified as important by most the people surveyed.

One final note is that Diverse and Unique Businesses ranked in the middle of the results for this question but also were echoed in the open-ended responses. The terms unique, diverse, variety, etc. were continuously stressed as important values for a shopping environment.

Question 12. Which of the following resources do you use when planning your trip to Downtown Ardmore?



Themes Specified in "Other" Responses:

56%	Routine / Live Nearby
37%	No Planning
13%	Driving Through
-	Social Media (Incorporated Above)

Breakdown as a Share of Each Age Cohort

Age	Destination Ardmore, Web, & Social Media	Main Line Times	Main Line Today	Posters in windows	Word of mouth
	Share of Total Cohort				
21-29	11%	2%	0%	11%	66%
30-39	21%	2%	1%	11%	52%
40-49	16%	3%	1%	8%	51%
50-59	15%	3%	2%	3%	47%
60-69	16%	6%	0%	4%	49%
Over 70	17%	12%	2%	0%	24%

Shopping

Information Resource Use

The overwhelming resource used by people planning a trip to Ardmore was word of mouth. This was true for almost half of the people surveyed. Another third of respondents within the "Other" responses specified that they live nearby and are familiar with the area.

When combining social media responses from the graph with relevant responses from the "Other" category (shown on the right below the graph), almost eighteen percent (18%) of people use social media to plan their trips. This category comprises the second largest category of information exchange. It would then appear that the existing social media resources currently being used in Ardmore have been an effective method for communicating to shoppers.

The chart to the bottom right breaks down each response by age group and then divides the total responses by the total population for each cohort. The results display the share of each age group that reported using various resources. Word of mouth was by far the largest source of information across all ages.

It is also relevant to point out that window posters had the second largest share as well as the greatest discrepancy by age group. Window signs were especially effective in reaching those between 21 to 39 years and least effective for those 50 or older.

Posters in business windows also align with responses to other questions that indicated people often window shop or drive through the area, stopping if they see something along the way. For these types of users, window signs and posters would be effective tools of communication, especially since walking is the second most common mode of getting downtown.

The Main Line Times still serves as an effective outreach tool, reaching four percent (4%) of people surveyed. *Main Line Today,* on the other hand, was rarely indicated as a primary tool. However, advertising may have other benefits in addition to communication, such as supporting local news outlets and the community, which should be taken into consideration.

Visit Frequency

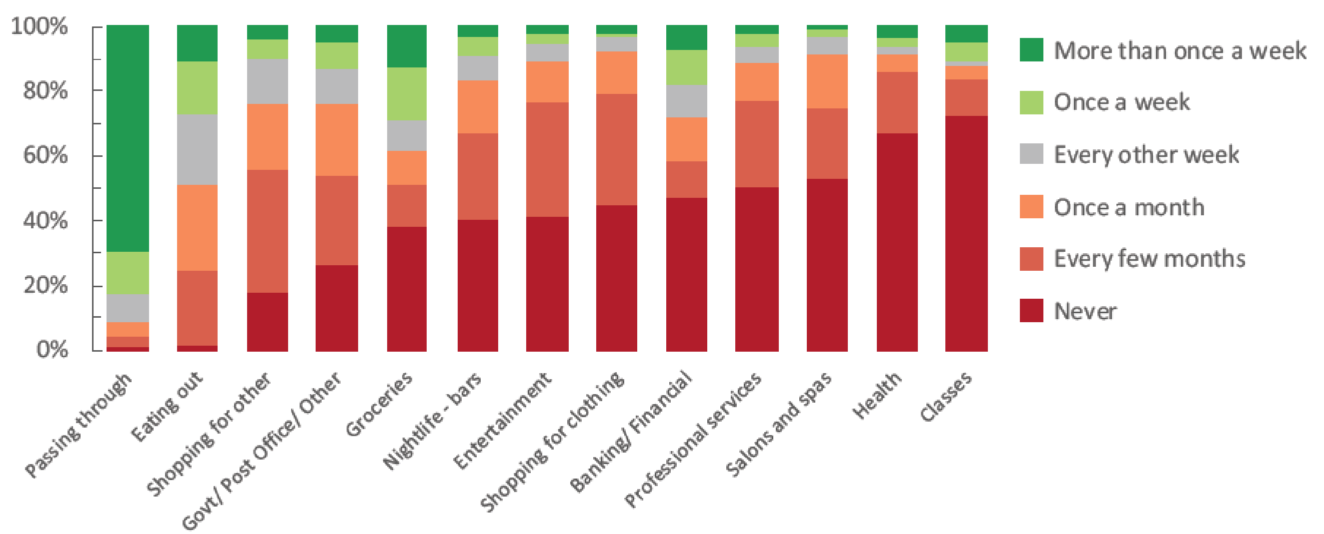
Most often, people visit downtown Ardmore several times a week just passing through the area. This makes sense because of its central location on Lancaster Avenue (US Rt 30) and by SEPTA's Regional Rail. Almost everybody surveyed passes through Ardmore at some point and an equal number of people also eat downtown occasionally.

About a quarter of those surveyed eat out downtown at least once a week or more and an additional twenty-five percent (25%) eat out downtown every other week. Groceries also scored high, with about thirty percent (30%) of people visiting downtown to buy groceries once a week.

The least common purposes for visits downtown was for health-related activities or for classes such as dance, education, fitness, etc. These responses should be compared with the relevance of classes and health facilities. The abundance of Ardmore locations downtown in this category indicates that there is likely an oversupply of these services in the area.

Nightlife and entertainment was a less common component for downtown visits. About forty percent (40%) of people surveyed responded positively to the idea of bringing more nightclubs and bars in the area. Attracting more bars and restaurants was the most common request in responses to Question 18. Question 16 shows that, when broken down by age, this type of

Question 13. How often do you come to Downtown Ardmore for the following? (excluding Suburban Square)



(Ordered by total 'Never' Responses)

amenity is only popular with those under the age of 49 and is more popular as age declines. However, the size of the age group also shrinks as age decreases.

Attention should be paid to ensure that restaurant and food options remain an attraction for the area and that it is a convenient place to stop while traveling through. There exists an opportunity to continue to build options and events in the evening to draw people to the area.

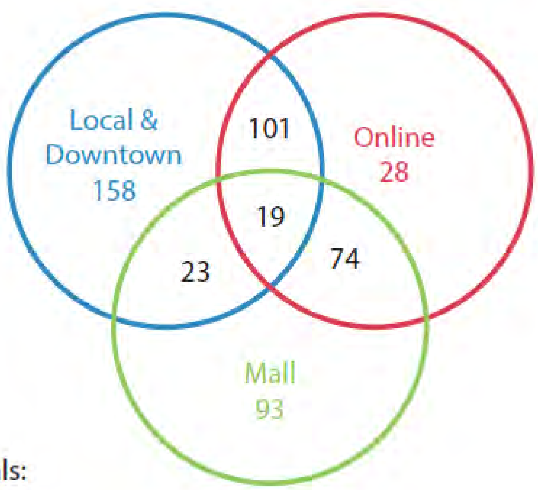
Question 14. If you come to Downtown Ardmore for other reasons, what are they?

Themes in Responses:

24%	Work
22%	Walk
14%	Friends
13%	Train
9%	Residence
8%	Church
5%	Events
5%	Music

*111 Categorized out of 221 total Responses

Question 11. Where do you do most of your shopping?



Totals:

301 Local &Downtown
222 Online
209 Mall

Other Reasons to Visit

Besides shopping, the two most popular reasons to visit downtown are for work or just to walk. These purposes coincide with the home and work zip codes seen in Questions 5 and 6. Most of the people who visit downtown also work and live in the area, and walking is one of the most popular methods of getting downtown.

The next two most popular reasons to visit are to take the train or visit friends, which relate to working and walking as well. Walking, visiting friends, and attending church are all purposes that contribute to building the feeling of community in the area. Other community building activities and programs would help to strengthen these types of visits to the area.

Shopping Locations

The Venn diagram below in Question 11 shows the overlap and number of responses for each shopping destination. When combined, the total for local & downtown was by far the most popular with 301 responses. Online was the second most popular with 228 responses and the mall accounted for 209 total.

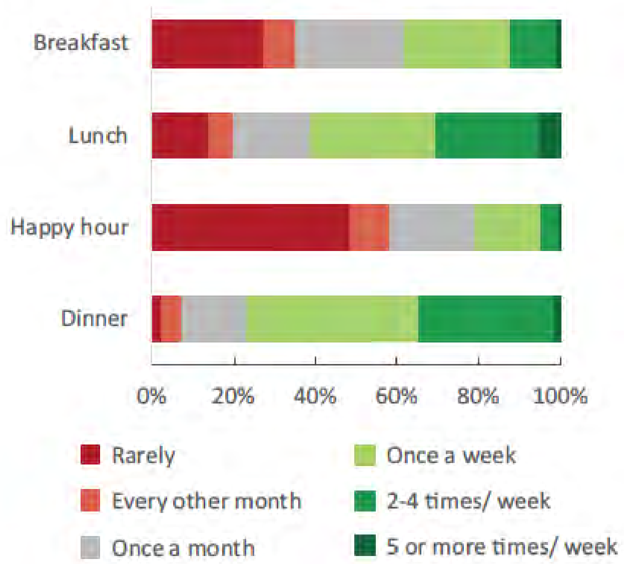
Local and downtown also had the single highest number of responses by itself. Some of the responses that mentioned the mall still voiced a preference for shopping locally. It appears that the mall and shopping downtown tend to be mutually exclusive. There were few results that overlapped.

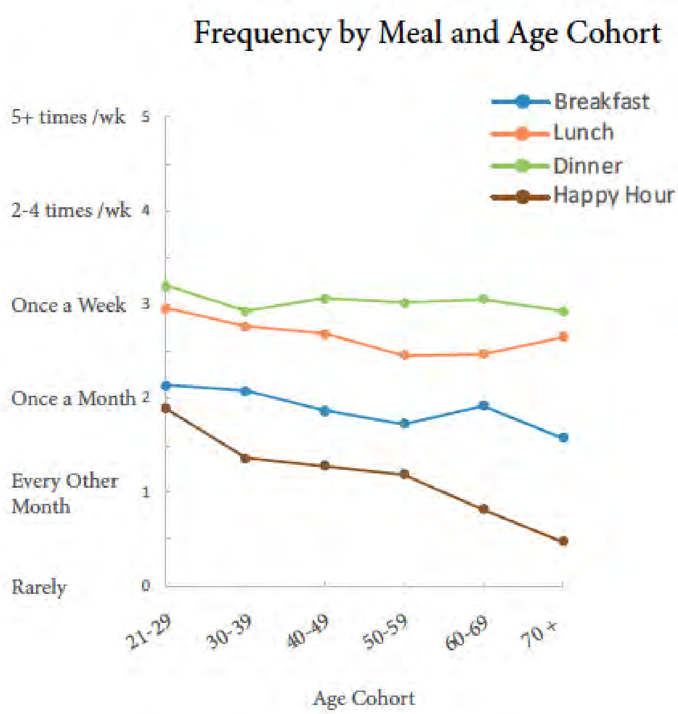
Online sales on the other hand were typically in combination with a brick and mortar option. Very few people solely shopped online. Most the overlap with online sales were in combination with shopping locally, however this overlap was not much more than those who shopped online at the mall.

Overall, the survey results favor local and downtown businesses for Ardmore shoppers through the large number of responses given for this category over the mall or online. However, this would be expected based on the bias associated with surveying shoppers already in downtown Ardmore. Very rarely did someone report to shop at all three options, but this could be due to the open-response format of the question.

Dining

Question 19. How often do you eat out?





Dining Frequency

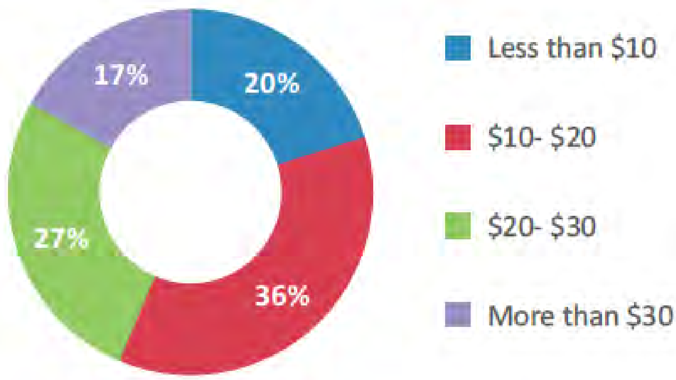
Dinner was the most frequent and common meal, with almost eight percent (80%) of respondents eating out for dinner at least once a week. Question 20 on the following page emphasizes this importance because dinner also averages a larger price per meal. Lunch followed closely behind and happy hour was the least frequent. More than fifty percent (50%) of the survey respondents ate out for lunch and dinner at least weekly, and less than fifty percent (50%) ate out for happy hour and breakfast each week.

The low levels of frequency for happy hour could be due to a lack of available places that attract people after work, or because other areas are more attractive. It could also be due to traffic congestion during this time. However, given that Ardmore was the most popular work zip code, there should be an increased potential to grow within this market area.

When meals eaten out in downtown Ardmore are combined by age cohort, one clearly visible pattern is that happy hour's popularity was the most dependent on age and steadily declined as age cohorts progressed. When combining all the meals together by age cohort (not shown), the frequency by month and week decreased overall as age increased. This is important because dining in general is more popular with younger crowds, and marketing promotions should continue to cater to these age demographics.

Another age pattern that can be seen is that breakfast varied among age groups as well. The frequency of people who ate out for breakfast rose among those from ages 60-69, matching the popularity of ages younger than 40. This trend is important because marketing and promotions should be specially tailored to accommodate age groups that are likely to eat out.

Question 20. When you eat out how much do you typically spend per person?



	Lunch	Dinner
Less than $10	45%	1%
$10- $20	49%	26%
$20- $30	6%	43%
More than $30	0%	30%

Spending per Meal

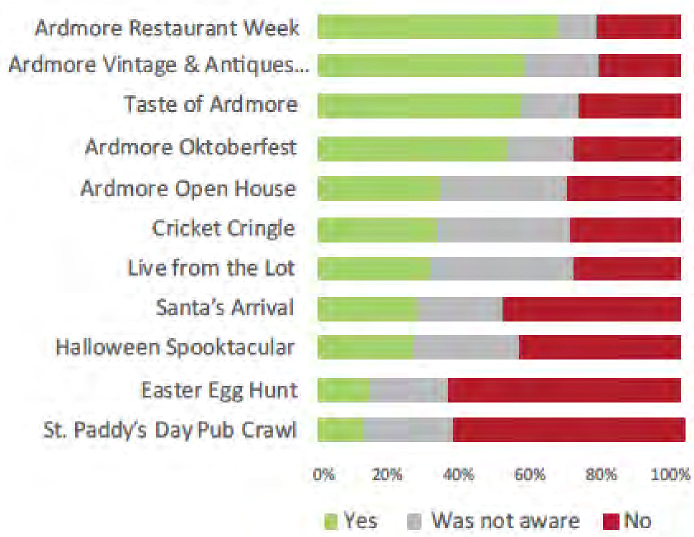
The spending habits of people who eat out are roughly split along the $20 price point. Just over half (56%) of the people surveyed spend $20 or less, while the remaining spend more.

When broken down between the two most frequented meals, lunch and dinner, it can be seen that dinner overall accounts for the higher spending pattern. In total, almost three quarters of all dinners purchased were more than $20 and thirty percent (30%) were in the highest price bracket.

Almost all lunches were less than $20. A large share (45%) of lunches were purchased for less than $10. It could be inferred that much of the lunch crowd possibly works in the area. This would account for the high frequency in the category of almost sixty percent (60%) reporting eating downtown at least once a week.

Expanding outdoor dining availability downtown may increase the ability for restaurants to serve more people per night. It also would enhance the pedestrian experience and vibrancy while fulfilling the requests of several of the people surveyed. Outdoor dining was the second most popular write-in suggestion for Question 24.

Question 23. Have you attended or would you attend any of the following Ardmore events?



Question 24. What other events or activities would you like to see in Downtown Ardmore?

Themes in Responses:

69	Music Events
20	Outdoor Dining
18	Art
18	Movies
16	Street Closed
15	Farmers Market
12	Cultural & Christmas Events
10	Run / 5k
10	Sidewalk Sale / Flea Market
7	Beer / Wine Events

*174 Categorized out of 249 total responses

Events, Shopping and Services

Event Attendance

The popularity of Restaurant Week and Taste of Ardmore, two of the top three most popular events, should not come as a surprise based on the previous findings that Ardmore is most commonly a destination for people to go for food. In addition, these events also have the most awareness indicating the effectiveness of marketing efforts.

Previous questions also stated that Ardmore's nightlife is not currently a draw for the area, and that residents desired more improvements in this area. It should be noted that the St. Paddy's Day Pub Crawl ranked lowest among Ardmore events. It is very likely that the success of an event such as this depends on the overall success of bars and nightlife in the area. Turnout is also highly dependent on a very specific age group, with forty-three percent (43%) positive responses from those ages 21-29, but only eighteen percent (18%) positive responses from those 30-39.

Other low scoring events fell along various holiday activities, which included the Easter Egg Hunt, Halloween Spooktacular, and Santa's Arrival. It is likely that this lower performance may be the result of a more limited time frame for advertising and availability of the event. Another reason is that only forty percent (40%) of shoppers have children at home. When looking at the percentage of attendance and interest for Santa's Arrival and Halloween Spooktacular just for families with children, attendance and interest was higher at rates of thirty-nine percent (39%) and thirty-seven percent (37%) respectively.

It is interesting to note that within the ‘Other’ responses for desired activities, music scored very highly. Many people requested various types of music themed events such as outdoor festivals and parades downtown, live music in bars, or other related amenities. Combined with the existing music venues and shops downtown, there is the potential to continue to build upon music as a unique cultural asset for Ardmore. It is also possible that if successful, a music scene can also attract shoppers from outside the immediate area while strengthening a unique downtown culture for the area.

A second common theme through the additional response was to enhance the programming of outdoor events. Whether it be sidewalk sales, a 5k run, events and festivals, or outdoor dining, there is an overwhelming desire to have more events outdoors and to make the outdoor environment more lively and inviting.

Question 25. Where besides Downtown Ardmore do you go for shopping, dining out, and entertainment?

63%	Philadelphia (Mostly Center City)
33%	King of Prussia
31%	Bryn Mawr
30%	Wayne / Radnor
14%	Narberth
12%	Wynnewood
8%	Media
7%	Havertown
4%	Conshohocken
3%	Plymouth Meeting
3%	Bala Cynwyd
3%	Springfield
2%	West Chester

***547 Categorized out of 573 total responses**

Other Shopping Destinations

Besides downtown Ardmore, Philadelphia was the most popular overall destination for shopping, dining, and entertainment. However, other towns along the Main Line such as Bryn Mawr, Wayne, Narberth, and Wynnewood were also popular competition for Ardmore in attracting business from shoppers in the area. The three major areas that can be grouped together when looking at shopping patterns for people in Ardmore would be Philadelphia, the Main Line, and the King of Prussia Mall.

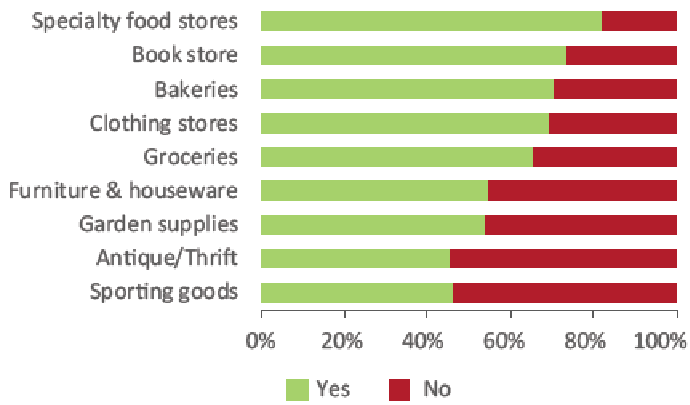
As a major city, Philadelphia’s immense size and economy have led to its growth as a destination. It draws people from throughout the area to its immense catalogue of dining and shopping locations throughout numerous distinct neighborhoods, each of which are the size of an individual town. So, it makes sense that Philadelphia, including all its individual neighborhoods, ranked at the top of the list for other destinations frequently visited.

However, instead of looking at Philadelphia, it may be more comparable to look at the other suburban townships that are more similar in size and relation to Ardmore. King of Prussia and the nearby towns along the Main Line were also logical places to go since they are the next closest commercial areas to Ardmore, and thus they scored highly as well. These towns followed Philadelphia in popularity.

The Ardmore Initiative should continue to monitor and learn from promotions, events, and advertising in competing downtowns that draw Ardmore shoppers. For example, Media is about 30 minutes to an hour drive depending on traffic, yet it draws about eight percent (8%) of Ardmore's shoppers. Plymouth Meeting, on the other hand, only draws three percent (3%) of Ardmore's shoppers. Media's share was the largest for a small town outside of the area and its Dining Under the Stars events were mentioned in various comments.

Some towns that have downtowns with similar characteristics as Ardmore, such as Media or West Chester, do not draw a significant number of Ardmore shoppers. This is probably an indication of the limitation that distance and accessibility places on travel habits.

Question 15. Would you visit Downtown Ardmore more often if it had more of the following types of businesses?



Common 'Other' Responses Specified:
Coffee Shops, Bars/Restaurants, Movie Theatre, Ice Cream, Clothing & Department Stores, Craft Store

(Specific responses for these categories can be found in Appendix C)

Percent difference in "Yes" responses by Age Cohort.

Answer Options	21-29	30-39	40-49	50-59	60-69	70 +
Specialty food stores	-17%	-9%	3%	6%	3%	5%
Book store	-3%	-8%	0%	1%	9%	-1%
Bakeries	7%	-3%	-4%	2%	5%	-1%
Clothing stores	10%	-7%	-3%	7%	1%	-1%
Groceries	2%	-4%	-2%	0%	5%	2%
Furniture & houseware	2%	-5%	-1%	9%	-1%	-5%
Garden supplies	-20%	-8%	0%	6%	9%	1%
Antique/Thrift	18%	1%	-2%	4%	-2%	-27%
Sporting goods	-18%	-3%	13%	5%	-12%	-7%

A positive number scored is *more* likely for that group compared to the total, and a negative number is *less* likely to visit.

The percent difference is a comparison, normalized across all groups, of the ratio of one age group is compared to the total rate of all ages combined.

So per the above, shoppers 21-29 year olds are *20% less likely* to shop for garden supplies than the total result shown in the graph.

<u>Opinions on Future Changes</u>

New Business Recruitment

More than half of the shoppers surveyed said that most of the business choices offered in the question would entice them to visit Ardmore more often. Of the choices, only antique/thrift stores and sporting good shops were enticing to just under half of the people surveyed. The most popular choices were specialty food stores, which were enticing to over eighty percent (80%) of those surveyed, and a new book store.

Food related business in general scored highly. Specialty food stores, bakeries, and grocery stores made up three of the top five scoring business categories. These food categories were equally or more popular with those in the age groups from 50-69. Those in younger age groups of 21-29 were less enthusiastic about specialty stores. Finally, those from 30-39 were less enthusiastic about the draw of food shops compared to the average of all ages combined.

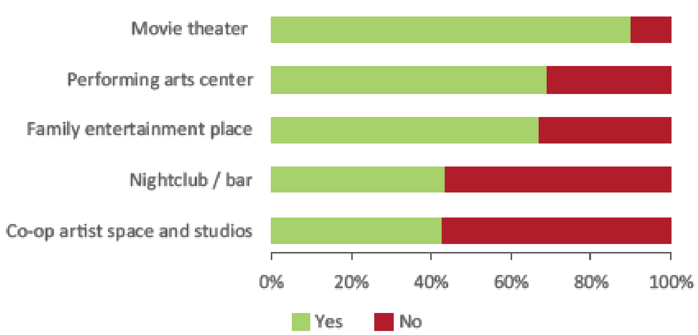
Clothing stores and antique/thrift shops were most popular with people 21-29 years old. However, the second most popular group for clothing and thrift stores were those 50-59, which is the same group in which furniture and housewares were most popular.

Sporting goods were one of the most polarizing categories. They were more popular with those 40 - 59 and unpopular with the youngest and oldest segments of the population. Gardening supplies were another category that was popular with older shoppers and significantly less popular with younger people.

Based on the survey results the top businesses that should be recruited are a specialty food store (80%), book store (75%), bakery (70%), and clothing store (69%). These were the top four items per responses. Groceries scored as the fifth most popularly requested business, however the current market may not have room for another grocery store considering the presence of several in the area and the construction underway to expand parking at Trader Joe's nearby.

Those within the 30-39 age group did not show any sharp departures from the consensus. They may show a slightly more negative bias against some business types, such as gardening supplies (8% less likely than average), but overall a specific difference was not identified for this group. Based on these results, it could be assumed that their preferences and behavior should be on par with the average for the overall population.

Question 16. Would you visit Downtown Ardmore more often if it had more of the following types of venues?



Percent difference in "Yes" responses by Age Cohort.

Answer Options	21-29	30-39	40-49	50-59	60-69	70 +
Movie theater	3%	-3%	3%	-1%	0%	-1%
Performing arts center	-10%	-7%	-1%	6%	7%	-3%
Family entertainment	6%	17%	13%	-4%	-26%	-34%
Nightclub / bar	18%	4%	9%	0%	-17%	-20%
Co-op space / studios	1%	-11%	1%	4%	5%	0%

A positive number scored is *more* likely for that group compared to the total, and a negative number is *less* likely to visit.

The percent difference is a comparison, normalized across all groups, of the ratio of one age group is compared to the total rate of all ages combined.

So per the above, shoppers 21-29 year olds are *10% less likely* to visit if there was a performing arts center.

New Venue Attractiveness

A movie theater was the top response from ninety percent (90%) of all survey respondents. Equally important was that this response was the top among all age groups with very little variation. Many of the other towns mentioned as top choices such as Wayne, Bryn Mawr, and Narberth still have movie theaters which likely has a large influence on this response. However, it is understood that this would be an extremely challenging project, given the fact that Ardmore's theater was renovated when it became a gym.

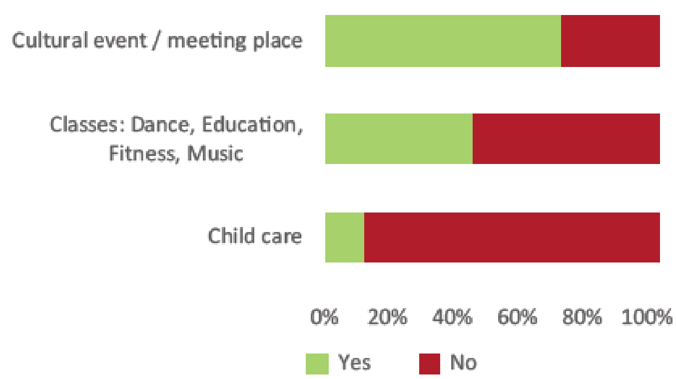
The current economics of the movie industry and the competition presented by the large stadium theater in King of Prussia and the nearby smaller theaters in Narberth, Wayne, and Bryn Mawr make bringing a movie theater back to

Ardmore difficult. However, there may be other options that can be explored to fill the demand for entertainment in the community.

It is interesting to look further at the popularity of the second highest rated venue, a performing arts center. Its popularity is closely trended with popularity per age. This venue was less popular with younger people and steadily rose in popularity with age, peaking at the 60-69 age group.

Unlike the performing arts center, family entertainment, which was almost tied for second place, had an inverse relationship with age. It was most popular with a younger audience, losing popularity as age rose. If the two complimentary venues could share resources such as parking and hold events under different schedules, it would allow for Ardmore to appease the diverging tastes across age groups.

Question 17. Would you visit Downtown Ardmore more often if it had more of the following types of services?



Percent difference in "Yes" responses by Age Cohort.

Answer Options	21-29	30-39	40-49	50-59	60-69	70 +
Cultural event	-18%	-5%	1%	2%	7%	3%
Classes	1%	10%	4%	-7%	-7%	-3%
Child care	4%	20%	1%	-10%	-11%	-9%

A positive number scored is *more* likely for that group compared to the total, and a negative number is *less* likely to visit.

The percent difference is a comparison, normalized across all groups, of the ratio of one age group is compared to the total rate of all ages combined.

So per the above, shoppers 31-39 year olds are *20% more likely* to visit if child care services were offered downtown.

Nightclubs and bars were popular among all age groups except those over 60 years. As could be expected, this option was most popular with those under 30, but the second most enthusiastic group was those 40-49.

There may be a feasible solution in finding a single location that could be used to appeal to those who would attend performing arts events, and the younger age groups that would be more attracted to a family entertainment place. These two interests very likely would be able to create a complementary schedule that could share the same facilities. In addition, this type of a project could be used to strengthen the sense of community and create a unique amenity in the area.

New Services Attractiveness

"Community feel" was one of the most frequent write- in responses to the open-ended questions. Both Ardmore and other favorite towns were cited as having this important attribute.

Both second two options scored favorably with under half of those surveyed. Classes such as dance, education, and music scored at about forty-five percent (45%) positive. Classes scored lower than this rate for all age groups over 50. It was also shown in the previous questions that this category is currently one of the least common reasons that people visit downtown Ardmore.

Question 18. What kinds of stores or eateries would you like to see in Downtown Ardmore? Are there shops in other towns that you think would do well in Downtown Ardmore? Please be specific.

225	Restaurants / Bars
92	Clothing / Shoes / Dept Store
89	Coffee Shop
44	Movies
41	Bakery
38	Ice Cream
37	Bookstore
16	Grocery
15	Arts & Crafts
11	Homewares / Hardware

Desired New Shops

Restaurants and bars are the most commonly requested additions. Many comments specified an ethnic cuisine, high end fast food eatery, or another restaurant. The following were some of the most specific restaurant themes sorted from 152 out of 206 responses:

- Various Ethnic Cuisine
- Vegan / Organic / Healthy
- New Bars
- Breakfast
  (Sub themes: Sabrina's, Bagels)
- High End Restaurants
  (Such as Steven Starr)
- High-End Fast Food

Bars, wine tastings, and other nightlife attractions such as places with music were also in high demand. This demand is apparent even though these types of attractions currently rank lower as a draw for the area.

The requests for clothing and shoe stores also varied across market groups and incomes. Shoppers requested high end, low end, thrift and consignment, and stores for children. Others wanted a replacement for Macy's, such as another large department store. Shoe stores for a similar myriad of price points and ages were also mentioned as desirable. The following is an ordered list of the most commonly requested retail shops:

- Department Store (Macy's, Marshall's, Etc.)
- Boutique Shops
- Shoes (Adult)
- Kids' Shoes
- Consignment
- Men's
- Women's
- Sporting Goods

The continued desire for a movie theatre and ice cream shop were also often repeated and may have impacted the fact that Wayne was a top answer in the following question. Another trend that persisted was replacements for popular shops that recently closed, such as Macy's. There were also several comments lamenting the closing of Milkboy and Melodie's coffee shops specifically and desiring a similar shop. Respondents also expressed a desire for a new La

Colombe location in Ardmore.

Question 26. If Downtown Ardmore could be like another town in Greater Philadelphia, which would you want it to be like, and why?

145	Wayne
59	Media
58	Ardmore
56	Chestnut Hill
47	Narberth
44	Bryn Mawr
37	Philadelphia
24	West Chester
19	Doylestown
19	New Hope
16	Manayunk
8	Ambler

8 - Center City
8 - South Philly
6 - NoLibs / Fishtown
5 - Old City / Society Hill
4 - Germantown/ Mt. Airy
3 - Rittenhouse Square
2 - Manayunk
1 - Fairmount

Other Towns

When compared to other towns, Wayne was by far the most popular suggestion with survey participants. Some of the reasons for this are probably because it is a similar town on the Main Line with a movie theater, coffee shops, greenery, an ice cream shop, and other attractions mentioned as desirable in the comments. It should also be noted that Wayne has a slower, calmer traffic pattern at 25 mph which may contribute to its appealing environment.

Media is the second most commonly mentioned town and is notable because it is separate from the other Main Line towns and it is a small town, unlike Philadelphia. Media's outdoor dining and other activities are some of the most attractive aspects about the area.

The rest of this report consists of three appendices and the credits for this report. All the survey data in the appendices are the original outputs generated from Survey Monkey and have not been altered in any way.

Appendix A includes all the graphs generated for the multiple-choice survey questions. These are the original outputs generated from the Survey Monkey platform.

Appendix B includes all the table outputs generated for the multiple-choice survey questions, with the exact percentages and number of responses listed for each multiple-choice question.

Appendix C includes all the responses written in the open-ended survey questions. These are the original outputs generated. All answers have been included from the original Survey Monkey results and have not been altered in any way. They have been grouped together by the themes that were used in the analysis of this report.

The final section is a credits page.