

Diverse Downtowns

75 of the region's downtowns were analyzed, and each were assigned a Diversity Score and a Pandemic Impact Score on scales of 1–100, with one being the most diverse and least impacted.

This effort found that more diverse downtowns were generally less impacted by the economic shutdown related to the COVID-19 pandemic.

All 75 of the downtowns that were analyzed are listed, along with their Pandemic Impact Scores, in order from most to least diverse.



Disclaimer:
This is an analysis of visits to and trade areas of the region's downtowns. However, it is not an economic impact analysis. Retail sales were not part of this body of work.

Princeton | 33
West Chester Borough | 34
Norristown Borough | 37
Burlington City | 46
Collingswood Borough | 45
Upper Darby Township | 32
Lower Merion Township (Ardmore) | 38
Glassboro Borough | 39
Phoenixville Borough | 44
Haddonfield Borough | 35
Woodbury City | 43
Lansdowne Borough | 49
Trenton (State Street) | 58
Bristol Borough | 26
Lansdale Borough | 54
Doylestown Borough | 29
Bordentown City | 52
Riverside Township | 59
Mount Holly Township | 48
Kennett Square Borough | 48
Chester City (Avenue of the States) | 41
New Hope Borough | 14
Swarthmore Borough | 60
Media Borough | 40
Gloucester City | 50

Pottstown Borough | 39
Coatesville City | 56
Moorestown Township | 54
Paulsboro Borough | 58
Swedesboro Borough | 43
Pitman Borough | 50
Lower Merion Township (Bryn Mawr) | 54
Quakertown Borough | 35
Philadelphia (52nd Street) | 33
Radnor Township (Wayne) | 50
Ambler Borough | 61
Palmyra Borough | 47
Marcus Hook Borough | 57
Malvern Borough | 45
Narberth Borough | 59
Downingtown Borough | 42
Haddon Township (Westmont) | 38
Merchantville Borough | 52
Pennsauken Township | 49
Camden City (Federal Street) | 42
Sellersville Borough | 75
Darby Borough | 55
Maple Shade Township | 58
Harrison Township (Mullica Hill) | 27
Langhorne Borough | 52

Newtown Borough | 42
Berlin Borough | 61
Norwood Borough | 67
Hightstown Borough | 55
Haddon Heights Borough | 58
Hatboro Borough | 47
Ridley Park Borough | 69
Perkasie Borough | 53
Audubon Borough (Merchant St.) | 58
Pine Hill Borough | 59
Jenkintown Borough | 52
Lower Merion Township (Haverford) | 75
Riverton Borough | 70
Cheltenham Township (Glenside) | 55
Yardley Borough | 49
Souderton Borough | 73
Haverford Township (Oakmont) | 59
Morrisville Borough | 60
Telford Borough | 59
Westville Borough | 64
Wenonah Borough | 58
Barrington Borough | 74
Haverford Township (Brookline) | 66
East Lansdowne Borough | 60
Laurel Springs Borough | 81

Characteristics that **reduced** the pandemic's impact:

Downtowns with the following characteristics were generally less impacted by the pandemic than their peers.

Development

Recent mixed-use, residential, and retail developments within the downtowns increased diversity as well as resiliency.

Diversity

Downtowns with diverse built environments, demographics, local economies, mix of uses, and transportation options, were less impacted.

People

Diverse and permanent residential populations located within the downtowns provided retailers with customers even as people stayed close to home.

Trails

Existing Circuit Trails connected downtowns with open space and enabled alternative modes of transportation.

Walkability

Historic downtowns with more pedestrian-friendly built environments had greater resiliency.

Characteristics that **exacerbated** the pandemic's impact:

Downtowns that lacked the characteristics found to reduce the pandemic's impact, or that were more greatly defined by the following characteristics, were generally more impacted by the pandemic than their peers.

Cars

Auto-oriented downtowns with lower Walk Scores and more cars per household were more impacted by the pandemic.

Colleges

Downtowns that are overly-reliant on these anchor institutions were less resilient during the pandemic.

Goods & Services

As the share of Neighborhood Goods & Services (NGS) retailers increased in a downtown, so did the pandemic's impact.

Transit

The pandemic significantly reduced transit ridership, and this impact had a ripple effect in transit-oriented downtowns.

Vacancy

The pandemic had a greater impact as downtown vacancy rates increased.

Diverse Downtowns | West Chester Borough, PA

For the 75 downtowns analyzed, each were assigned a Diversity Score and a Pandemic Impact Score on scales of 1–100, with one being the most diverse and least impacted. The more diverse downtowns were generally less impacted by the pandemic.

West Chester's walkable downtown has a substantial residential population, as well as a healthy mix of civic, cultural, office and residential uses. These characteristics are why the downtown's Diversity Score of 26 was the second best in the region only behind Princeton, NJ.

The diversity within West Chester's downtown most likely helped mitigate the impacts of the pandemic, which is why it was one of the 10 least impacted downtowns with a Pandemic Impact Score of 34.

26

Diversity Score

Built environment, mix of uses, population, transportation, and types of downtowns

34

Pandemic Impact Score

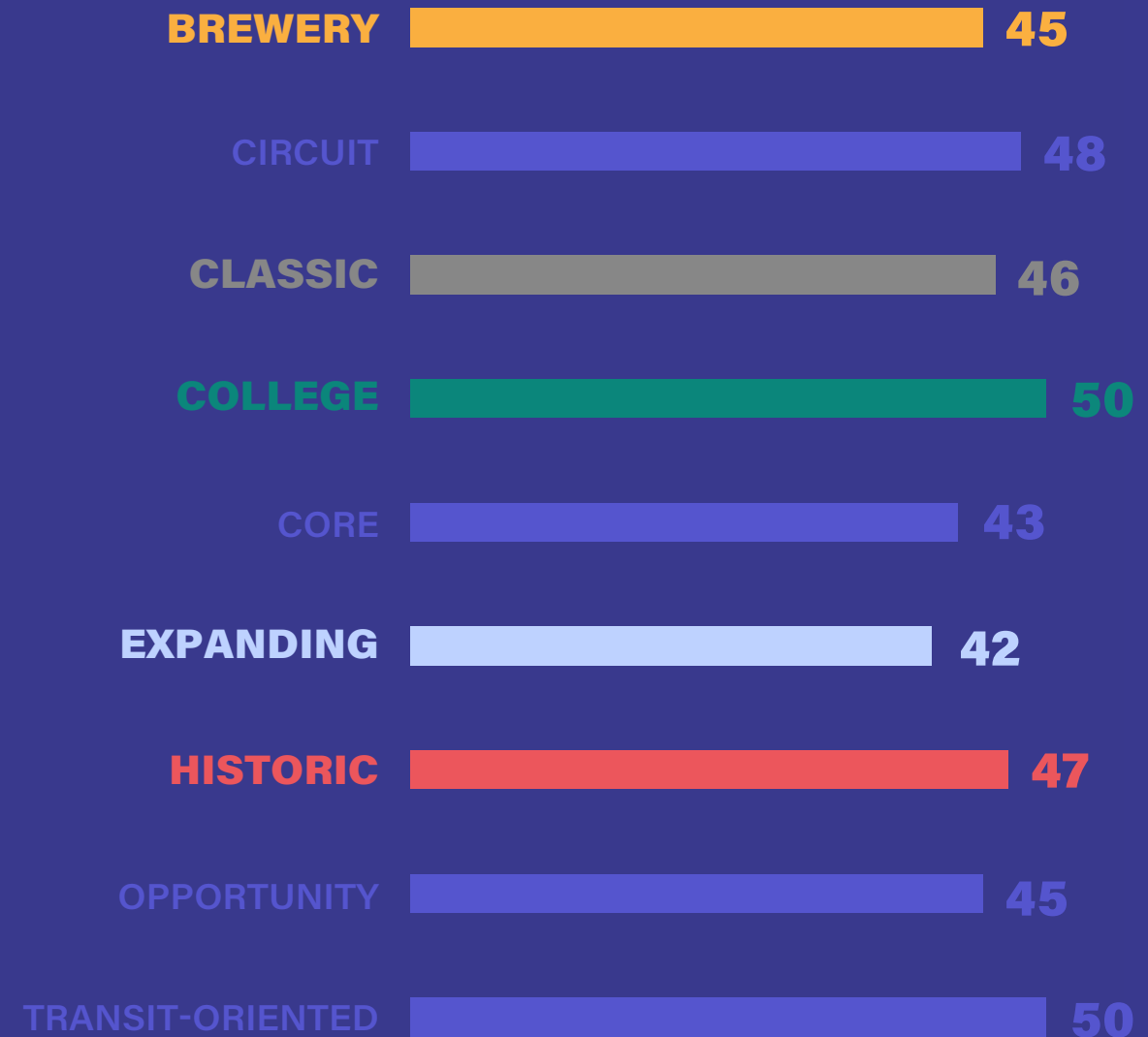
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

Downtown Typologies

Nine downtown typologies were identified and the average Pandemic Impact Score was determined for each: *Brewery* (45), *Circuit* (48), *Classic* (46), *College* (50), *Core* (43), *Expanding* (42), *Historic* (47), *Opportunity* (45), and *Transit-Oriented* (50).

In general, more typologies equated to a lower Pandemic Impact Score. West Chester is considered to be five typologies: *Brewery*, *Classic*, *College*, *Expanding*, and *Historic*. Downtowns considered to be five typologies had an average Pandemic Impact Score of 42.

Although West Chester is considered a *College* downtown, which was one of the most impacted typologies, its overall diversity most likely helped to offset impacts observed in the region's other *College* downtowns.



Downtown Population

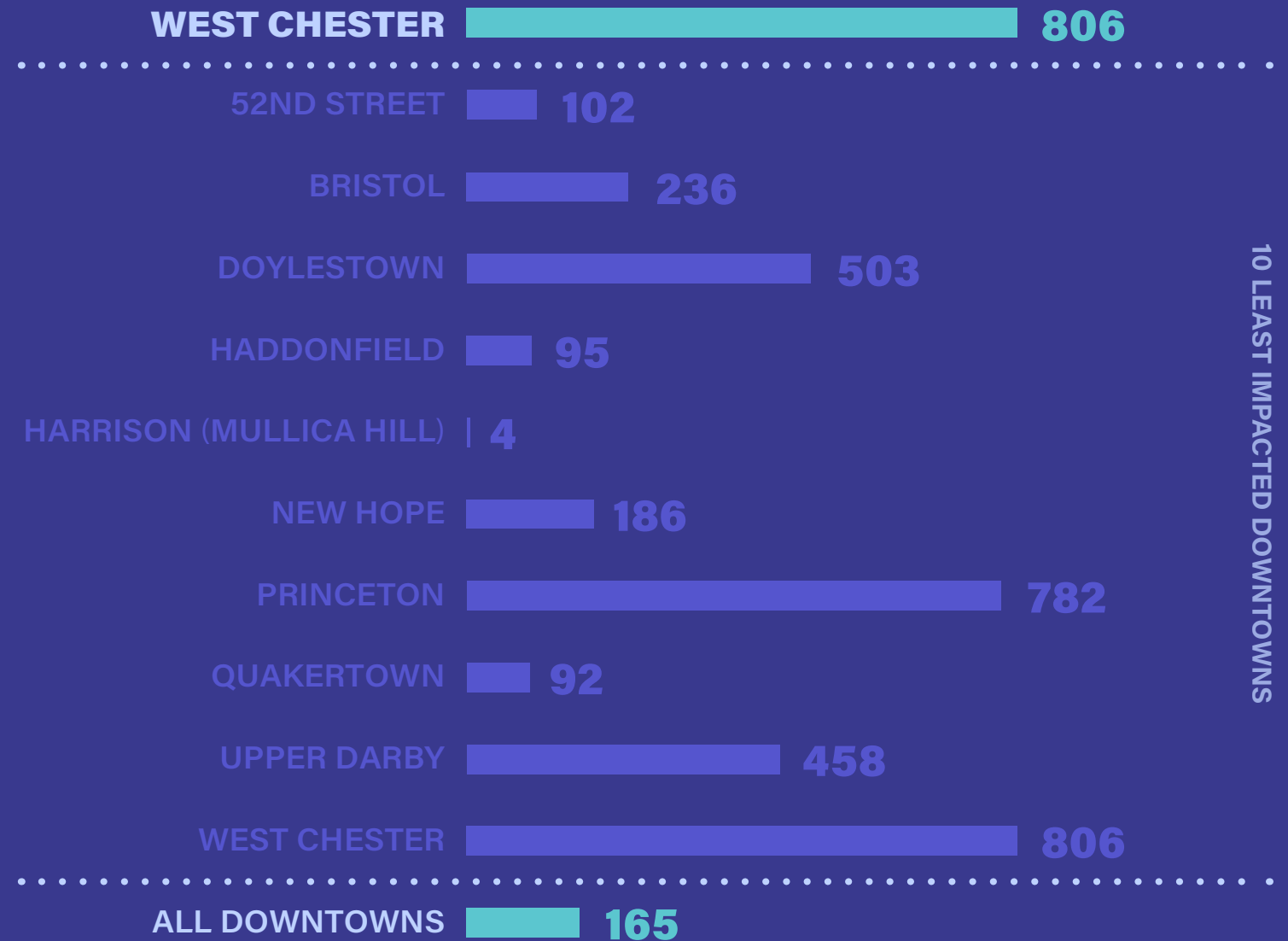
A negative correlation between the estimated population of the region's downtowns and the Pandemic Impact Score was identified. In other words, the larger the downtown population, the smaller the impact.

In 2019, West Chester's downtown population was estimated to be 806, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.

Residential development in recent years most likely added to West Chester's downtown population. This not only helped to diversify the downtown, but most likely contributed to its resiliency during the pandemic as *Expanding* downtowns were the least impacted on average.



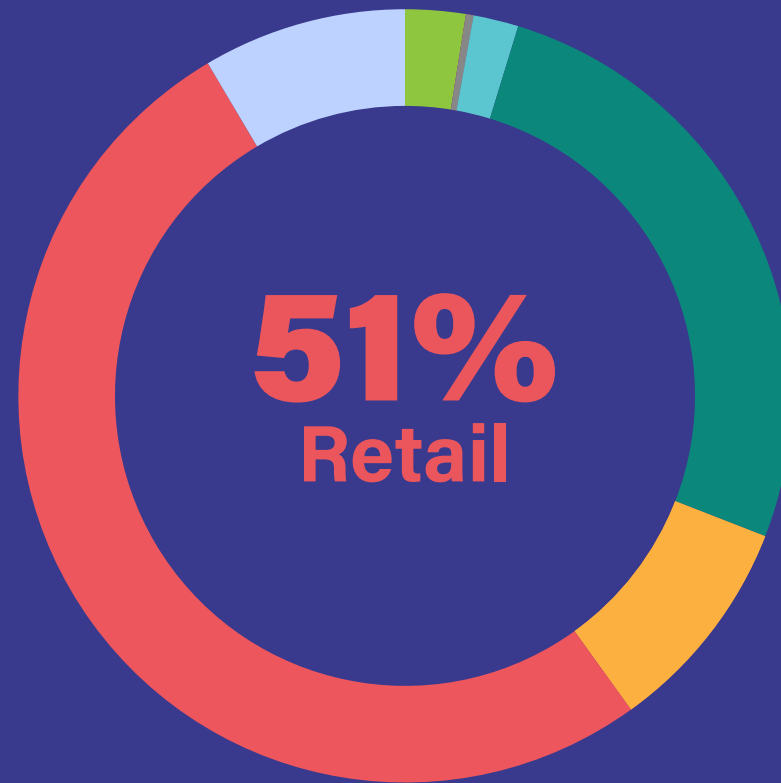
SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Retail Mix:

- 1% Experiential (EXP)
- 42% Food & Beverage (FB)
- 29% General Merchandise, Apparel, Furnishings, & Other (GAFO)
- 1% Hospitality (HOSP)
- 27% Neighborhood Goods & Services (NGS)



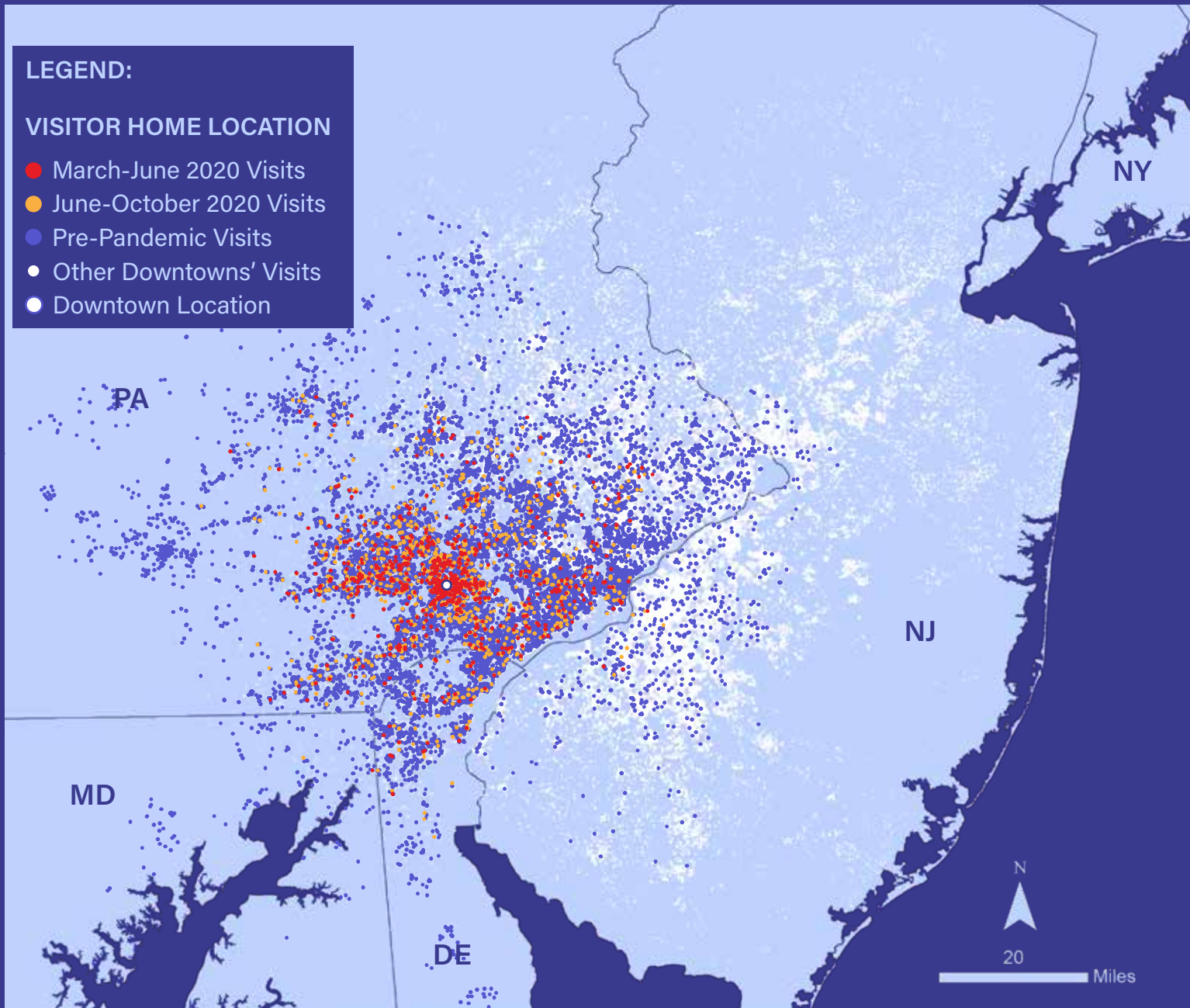
Mix of Uses

- 3% Civic
- 0.3% Construction
- 2% Cultural
- 0% Institutional
- 26% Office
- 9% Residential
- 9% Vacancy

Retail accounts for 51% of the uses in West Chester's downtown, which is lower than the averages of 57% for all downtowns and 60% for the other least impacted downtowns.

In the least impacted downtowns, *Food & Beverage (FB)* makes up a significantly lower share of retail uses at 30%, while *General Merchandise, Apparel, Furnishings & Other (GAFO)* makes up a larger share 38%. On average, as the share of each of these increased, the Pandemic Impact Score decreased. Conversely, as the share of *Neighborhood Goods & Services (NGS)* retailers increased so did the Pandemic Impact Score. In the least impacted downtowns, NGS retailers made up 30% of all retail, which is slightly larger than in West Chester.

Of note, West Chester is one of only three downtowns to have both *Experiential* and *Hospitality* uses as well.



Visits to Downtown

Geolocated, deidentified cellphone location data was analyzed to determine the pandemic's impact on visits to the region's downtowns and their trade areas. Visits to West Chester were as follows:

- **Pre-Pandemic**

Delaware: 6.7%	New York: 0.0%
Maryland: 0.8%	Pennsylvania: 89.8%
New Jersey: 2.7%	
- **Shutdown | March 13 - June 15, 2020**

Delaware: 3.5%	New York: 0.0%
Maryland: 0.1%	Pennsylvania: 96.0%
New Jersey: 0.4%	
- **Reopening | June 16 - October 31, 2020**

Delaware: 5.3%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 94.2%
New Jersey: 0.4%	

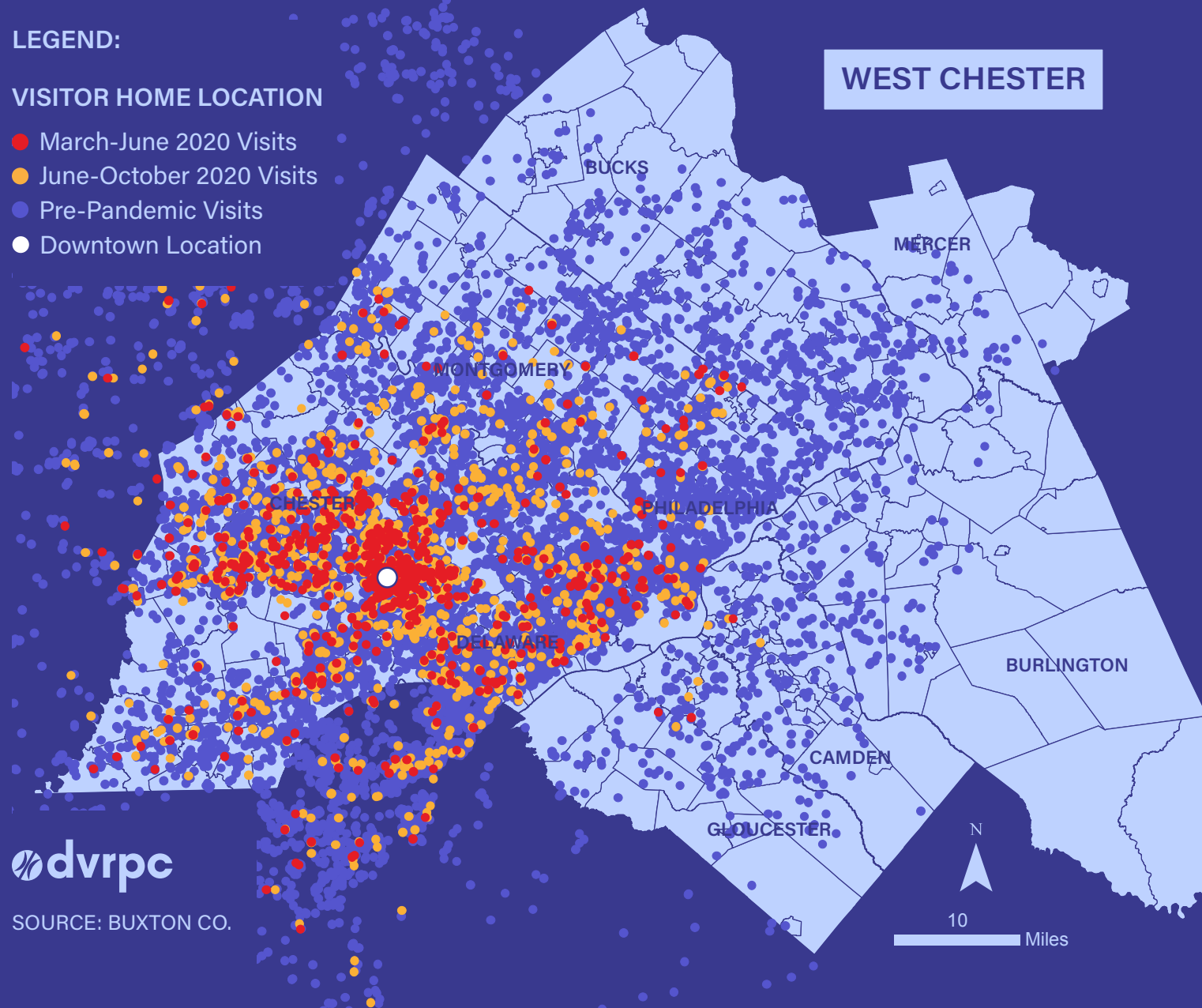


SOURCE: BUXTON CO.

LEGEND:

VISITOR HOME LOCATION

- March-June 2020 Visits
- June-October 2020 Visits
- Pre-Pandemic Visits
- Downtown Location



SOURCE: BUXTON CO.

Visits to Downtown

Pre-pandemic, visitors to West Chester's downtown came from throughout the region and beyond. However, during the pandemic, the majority of visits came from Chester, Delaware, Montgomery, and Philadelphia Counties.

Between August 2018 and March 2020, 25,360 people visited the downtown, which is nearly three times the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 958 visits, and during the reopening period (June 16 - October 31) there were 1,943 visits to West Chester's downtown.

Shutdown Impact

March 13 - June 15, 2020

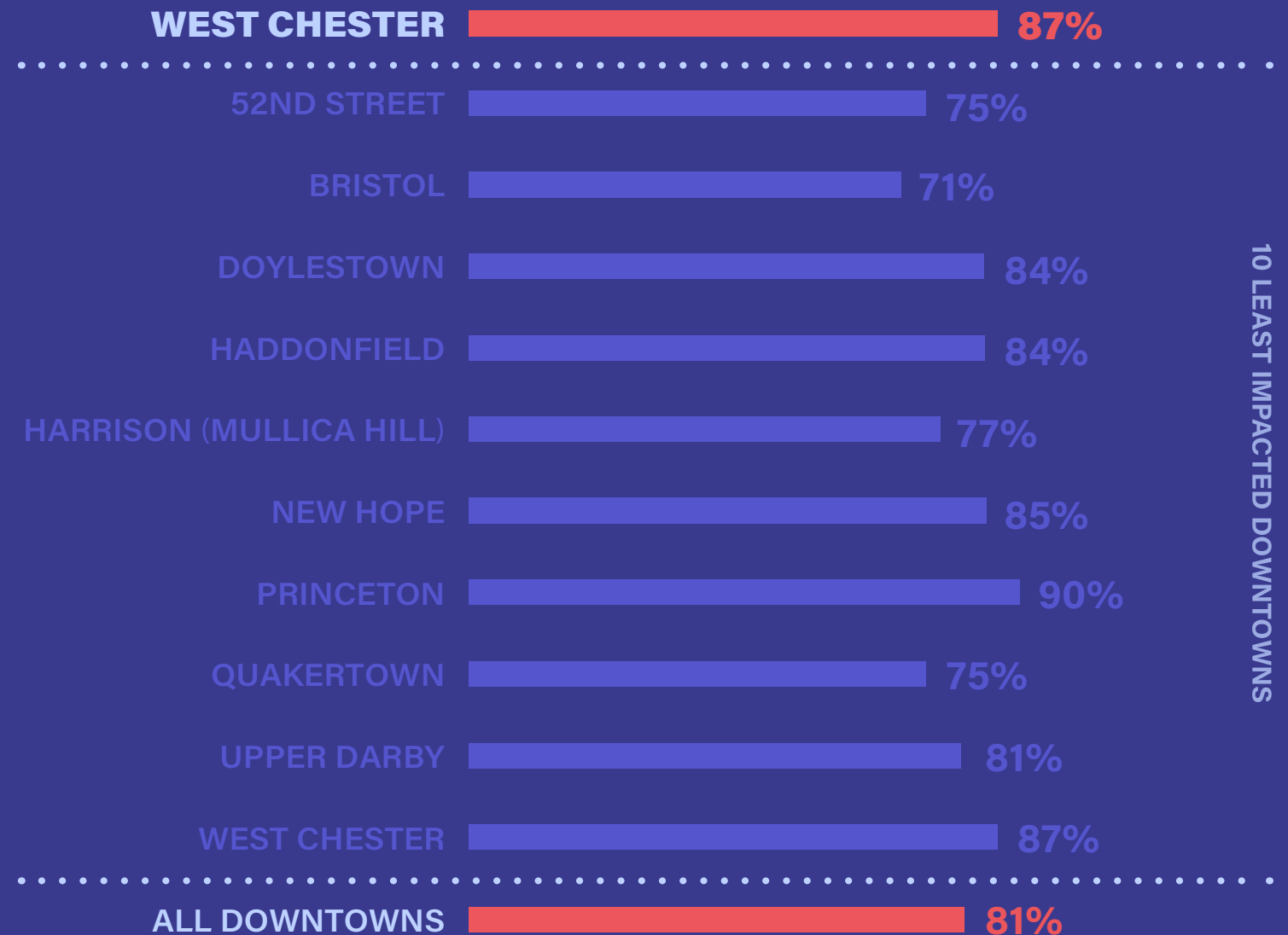
During the economic shutdown, there were 958 visits to West Chester's downtown compared to 7,114 visits during the same period in 2019. This equated to an 87% reduction.

The average number of visits during the shutdown period was 439 compared to 2,450 visits during the same period in 2019, which equated to an average reduction of 81%.

Gloucester City's downtown had the smallest reduction in visits at 66%, and the average for the least impacted downtowns was 81%.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Reopening Rebound

June 16 - October 31, 2020

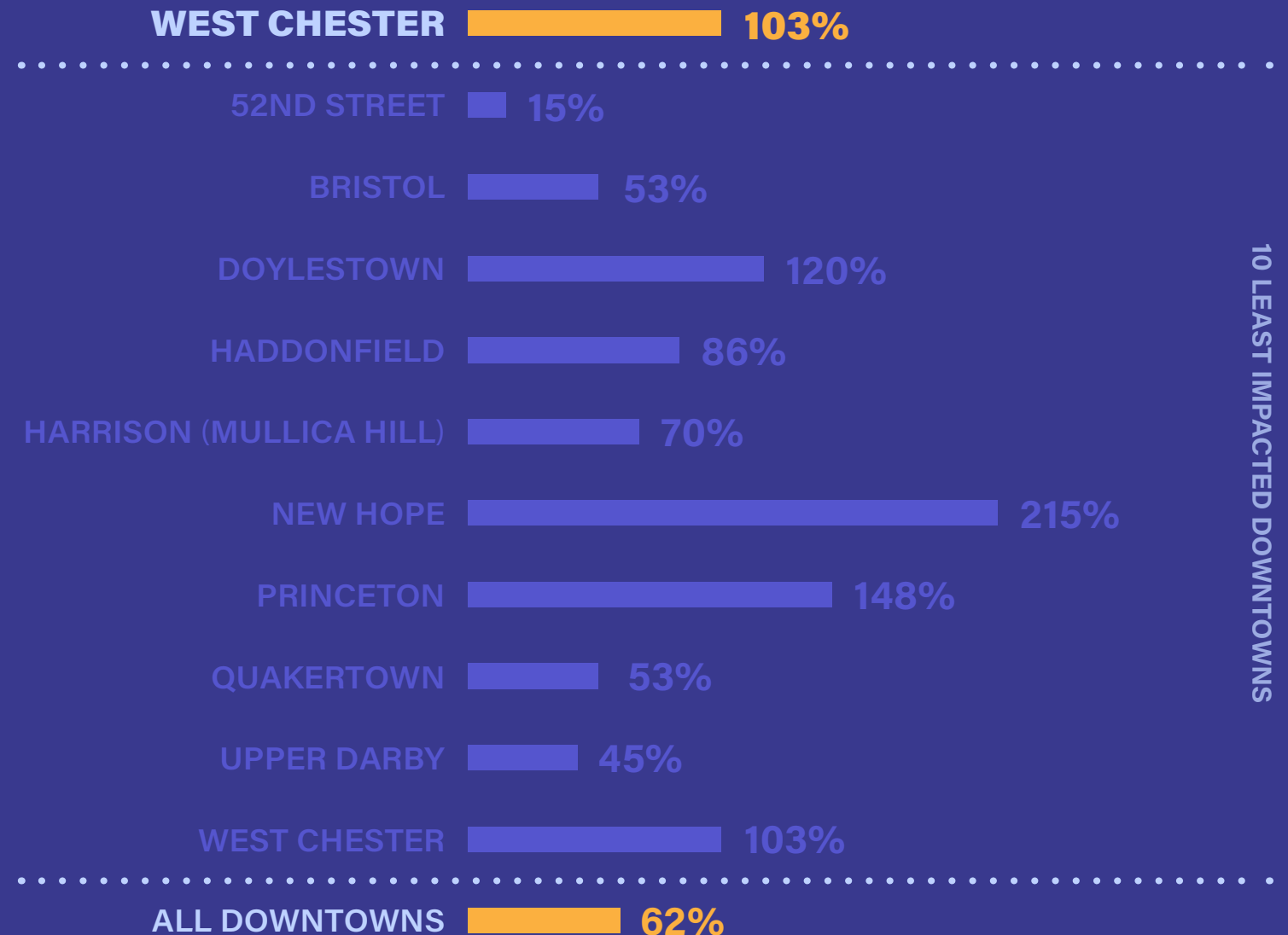
Visits to West Chester's downtown increased by 103% during the reopening period to a total of 1,943 visits. This was 78% fewer than the 8,793 visits that occurred during the same period in 2019.

On average, visits increased by 62% for downtowns, to approximately 700 visits, and by 91% for the least impacted downtowns, to approximately 1,700 visits.

New Hope observed the greatest increase at 215%, with more than 2,800 visits during that time.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Trade Area Recovery

(Drive Time in Minutes)

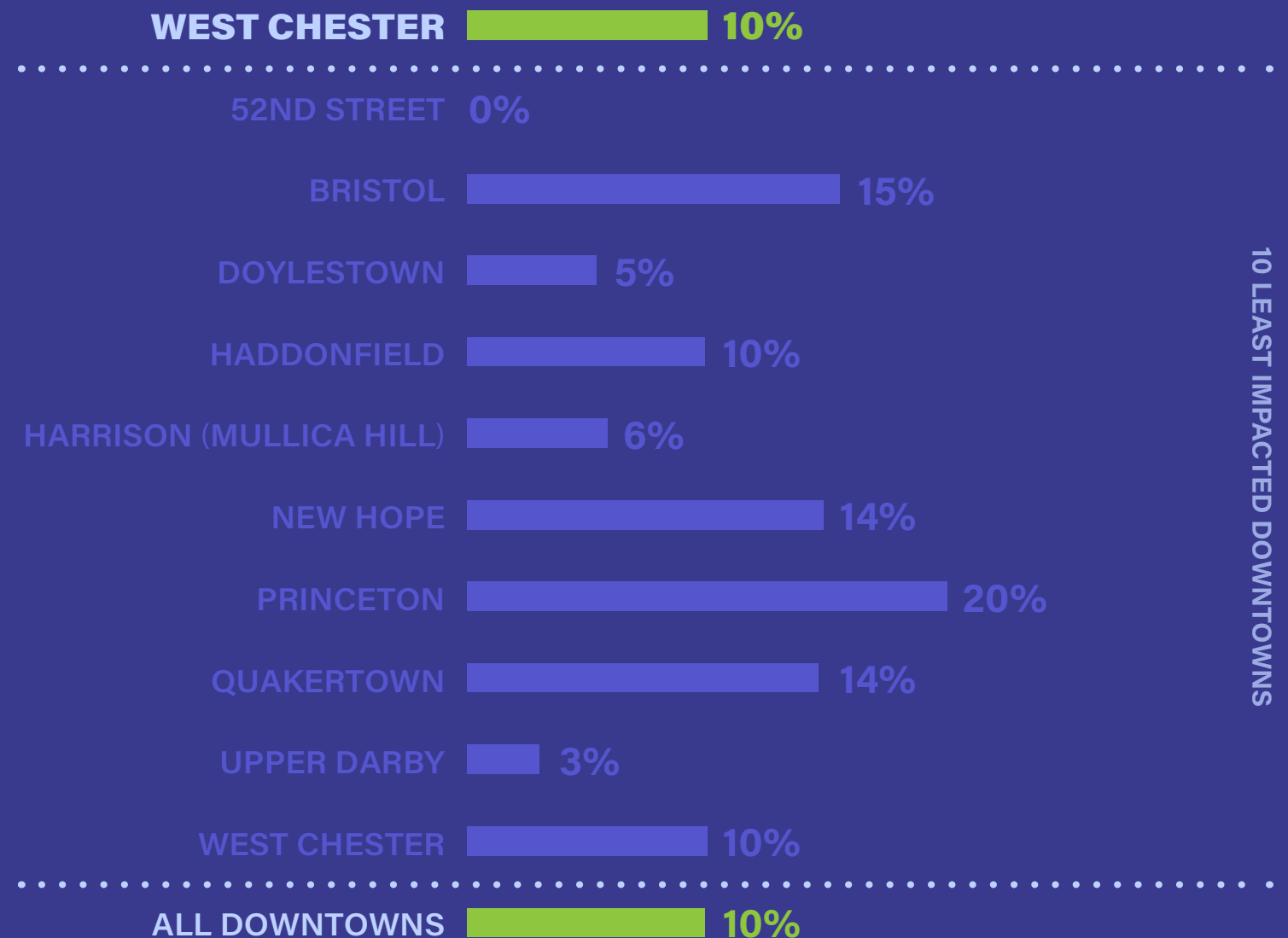
West Chester's pre-pandemic trade area was a 41 minute drive time, which shrank by 22% during the shutdown to 32 minutes. During reopening, the trade area recovered by 10% to 36 minutes.

The average pre-pandemic trade area was 31 minutes, with a 23% reduction during the shutdown down to 24 minutes. The average recovery was 10% for all downtowns up to 27 minutes.

At 69 minutes, New Hope was the only downtown with a trade area that extended beyond an hour, and that was larger during reopening (72 minutes).



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS