

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 | Upper Darby Township, 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.

Upper Darby's downtown has one of the largest and most diverse populations, and it is also one of the most walkable downtowns in the region. It also has a number of civic, cultural and office uses in the downtown. As a result, Upper Darby is one of the most diverse downtowns, and it has a Diversity Score of 29.

Upper Darby's social and economic diversity, and its walkable built environment most likely helped mitigate the pandemic's impact. With a Pandemic Impact Score of 32, Upper Darby was one of the 10 least impacted downtowns.



29

Diversity Score

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



32

Pandemic Impact Score

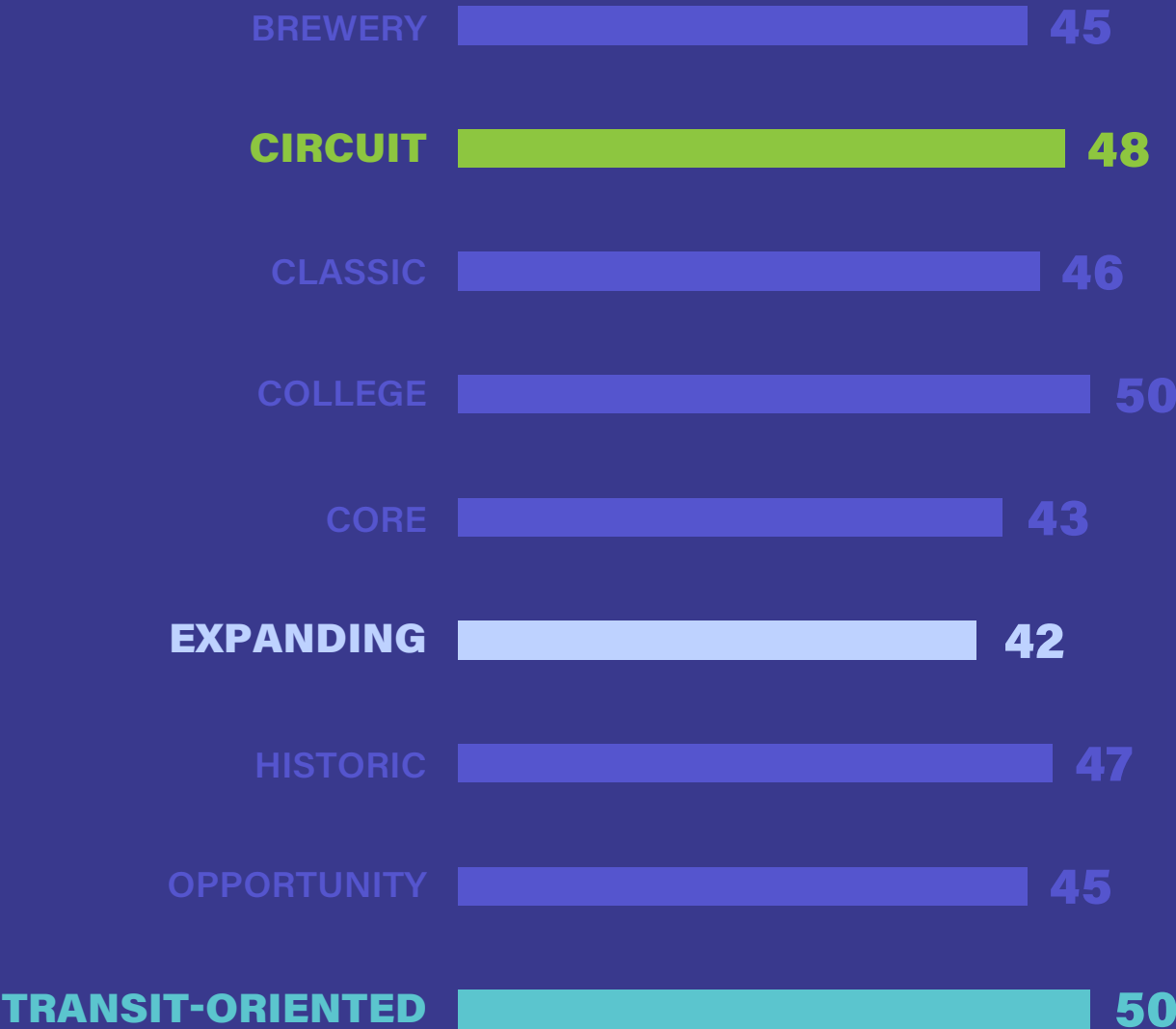
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

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. Upper Darby is considered to be three typologies: *Circuit* (trail has not yet been built), *Expanding* (potential infill development sites), and *Historic*. Downtowns considered to be three typologies had an average score of 53.

While *Circuit* downtowns with an existing trail had an average score of 48, those that had not yet built their trails had a Pandemic Impact Score of 53. Also, downtowns with the potential to expand had an average score of 46, compared to 42 for those that have actually expanded.



Downtown Population

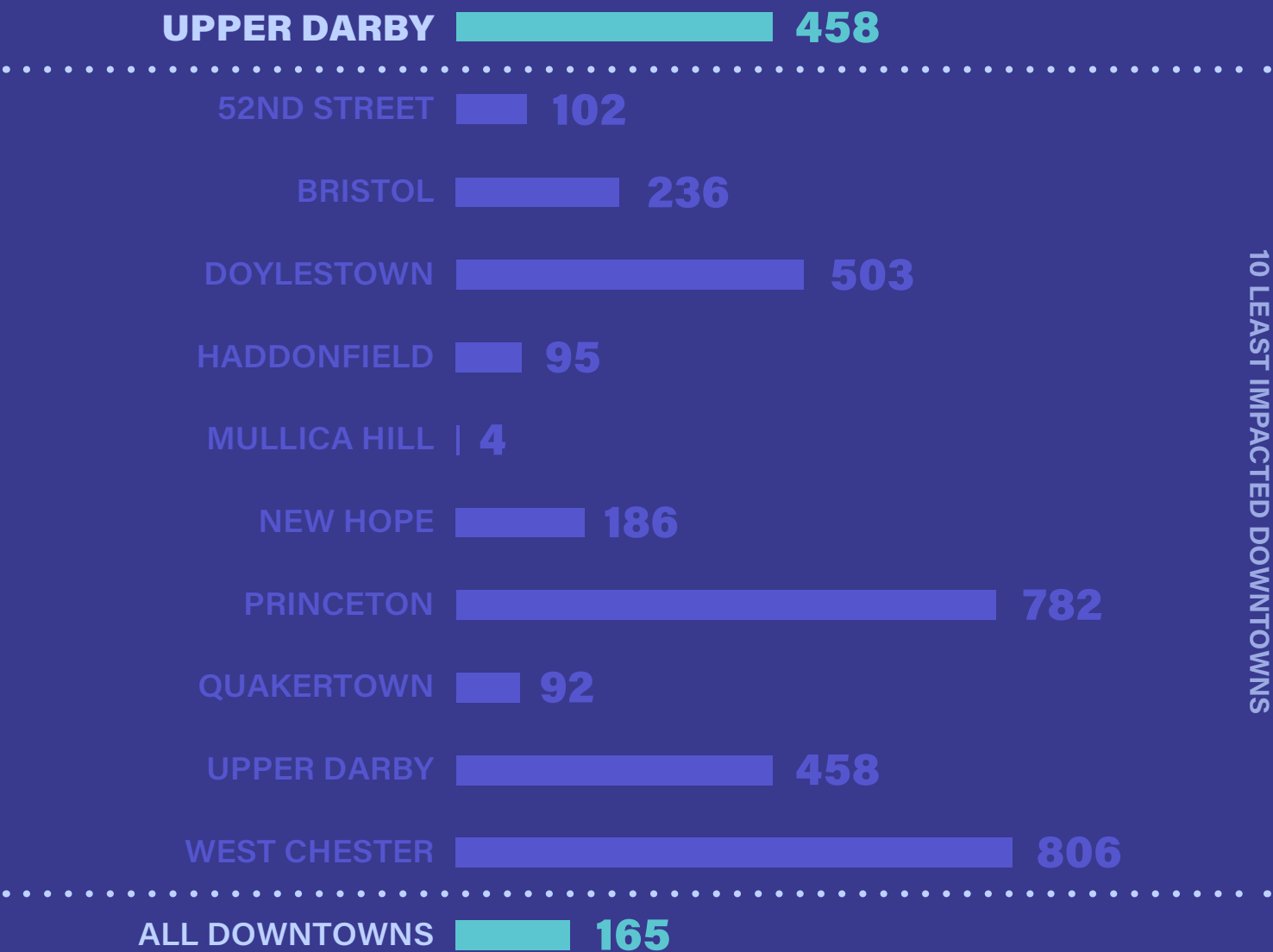
A negative correlation between the estimated population of the region’s downtowns and the Pandemic Impact Score was identified. In other words, the larger the downtown population, the smaller the impact.

In 2019, Upper Darby’s downtown population was estimated to be 458, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.

Upper Darby’s downtown population is relatively diverse with regards to demographics, with the White, Black, and Hispanic populations accounting for 16%, 30%, and 15% respectively. It also has a large Asian population at 43%.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Mix of Uses

Retail accounts for 72% of the uses in Upper Darby's downtown. The average was 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage* (FB) makes up a larger share of retail uses at 30%, while *General Merchandise, Apparel, Furnishings & Other* (GAFO) is nearly equal at 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 less than in Upper Darby.

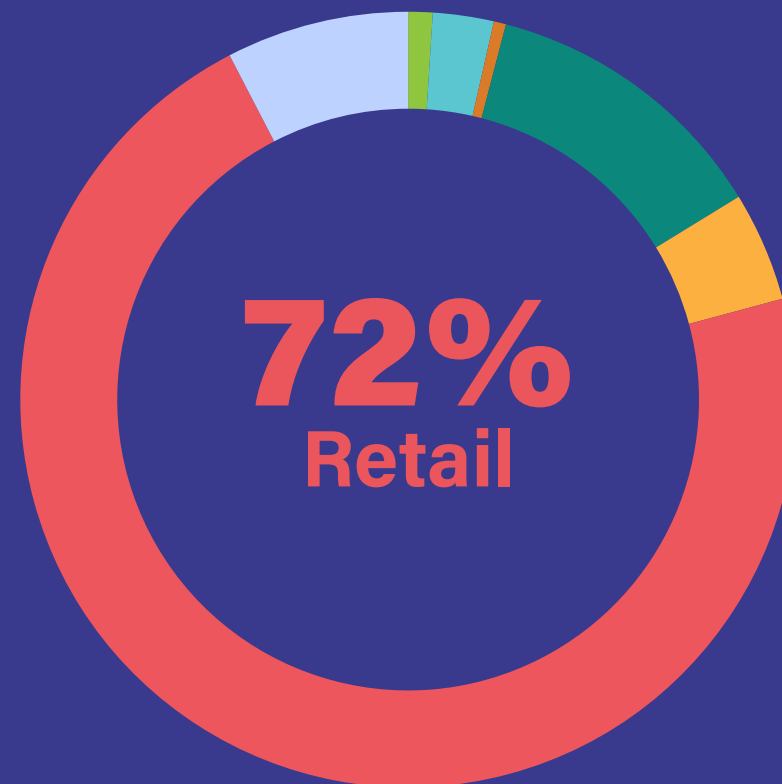
Additionally, as the vacancy rate increased, so did the Pandemic Impact Score.

Retail Mix:

23%
Food & Beverage (FB)

37%
General Merchandise,
Apparel, Furnishings,
& Other (GAFO)

40%
Neighborhood Goods
& Services (NGS)



1%
Civic

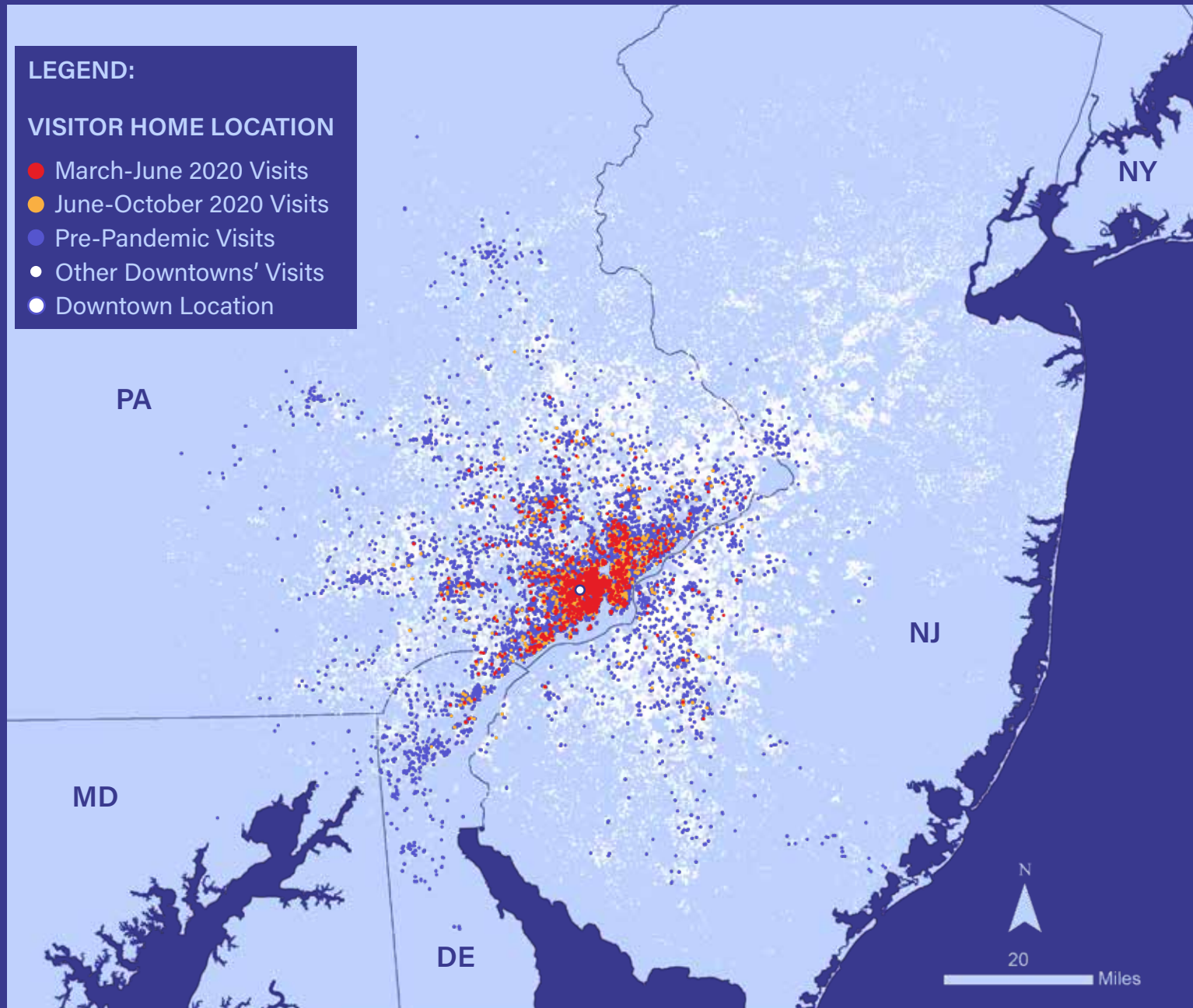
3%
Cultural

1%
Institutional

12%
Office

5%
Residential

8%
Vacancy



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 Upper Darby's downtown were as follows:

● Pre-Pandemic

Delaware: 2.3%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 94.6%
New Jersey: 3.0%	

● Shutdown | March 13 - June 15, 2020

Delaware: 0.8%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 98.1%
New Jersey: 1.1%	

● Reopening | June 16 - October 31, 2020

Delaware: 1.0%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 97.5%
New Jersey: 1.5%	

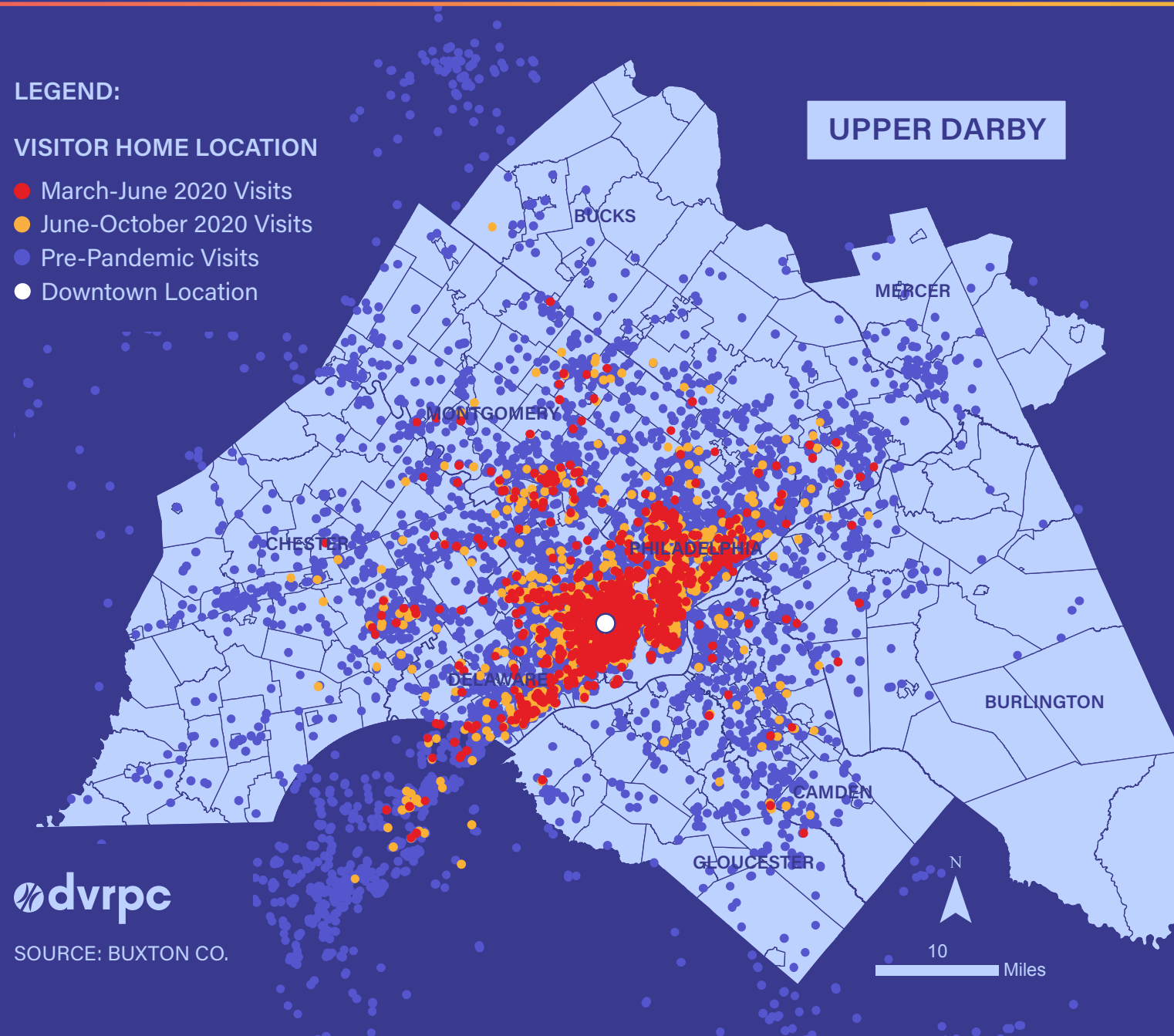


SOURCE: BUXTON CO.

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 Upper Darby primarily came from Camden County in New Jersey, as well as from Chester, Delaware, Montgomery, and Philadelphia Counties in Pennsylvania. During the pandemic, the majority of visits came from Delaware and Philadelphia Counties, and somewhat from Chester and Montgomery Counties.

Between August 2018 and March 2020, 32,383 people visited the downtown. This was the most visits for any downtown in the region, and it is significantly more than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 1,828 visits, and during the reopening period (June 16 - October 31) there were 2,642 visits to Upper Darby's downtown.

Shutdown Impact

March 13 - June 15, 2020

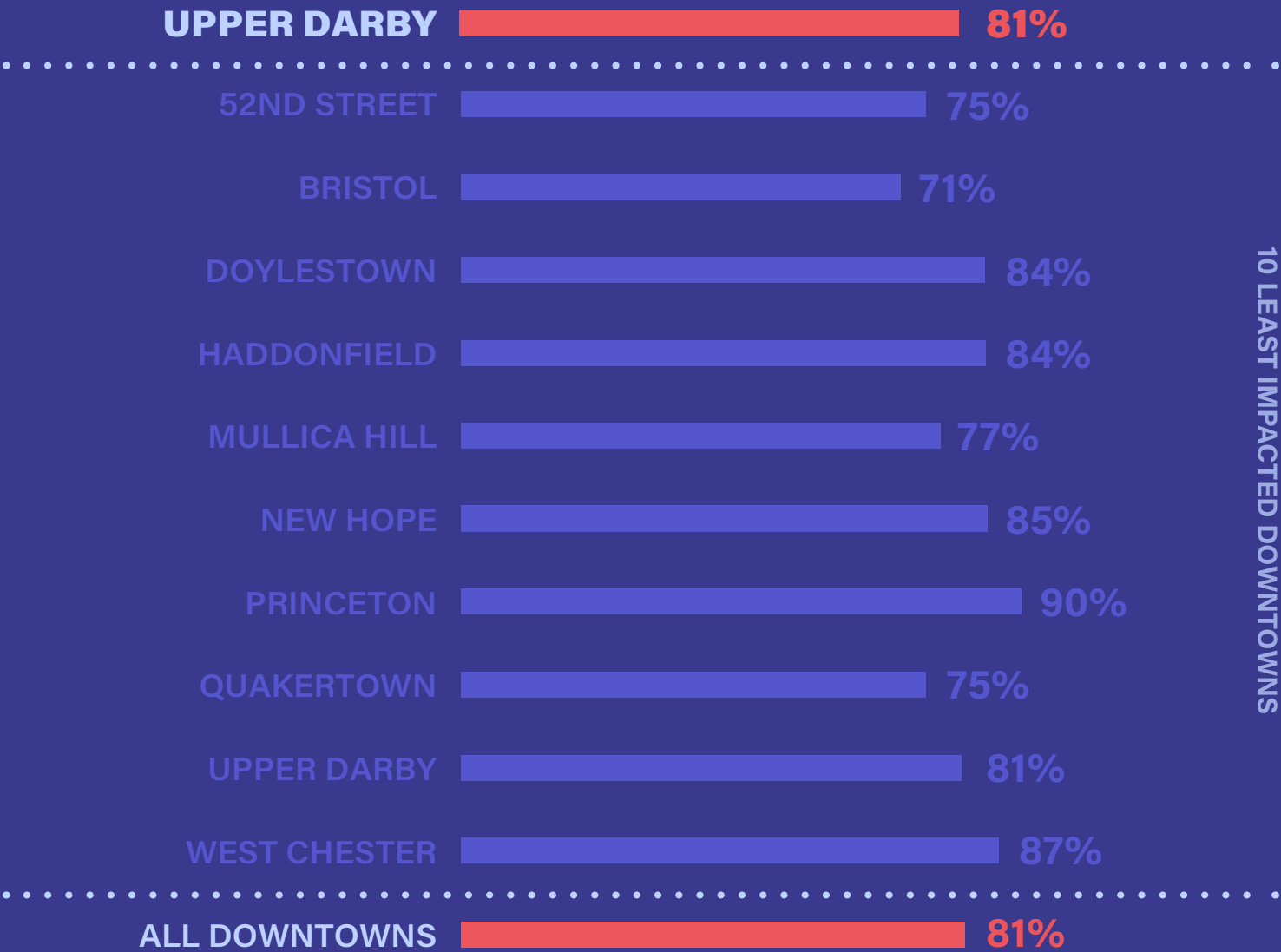
During the economic shutdown, there were 1,828 visits to Upper Darby’s downtown compared to 9,387 visits during the same period in 2019. This equated to a reduction of 81%.

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

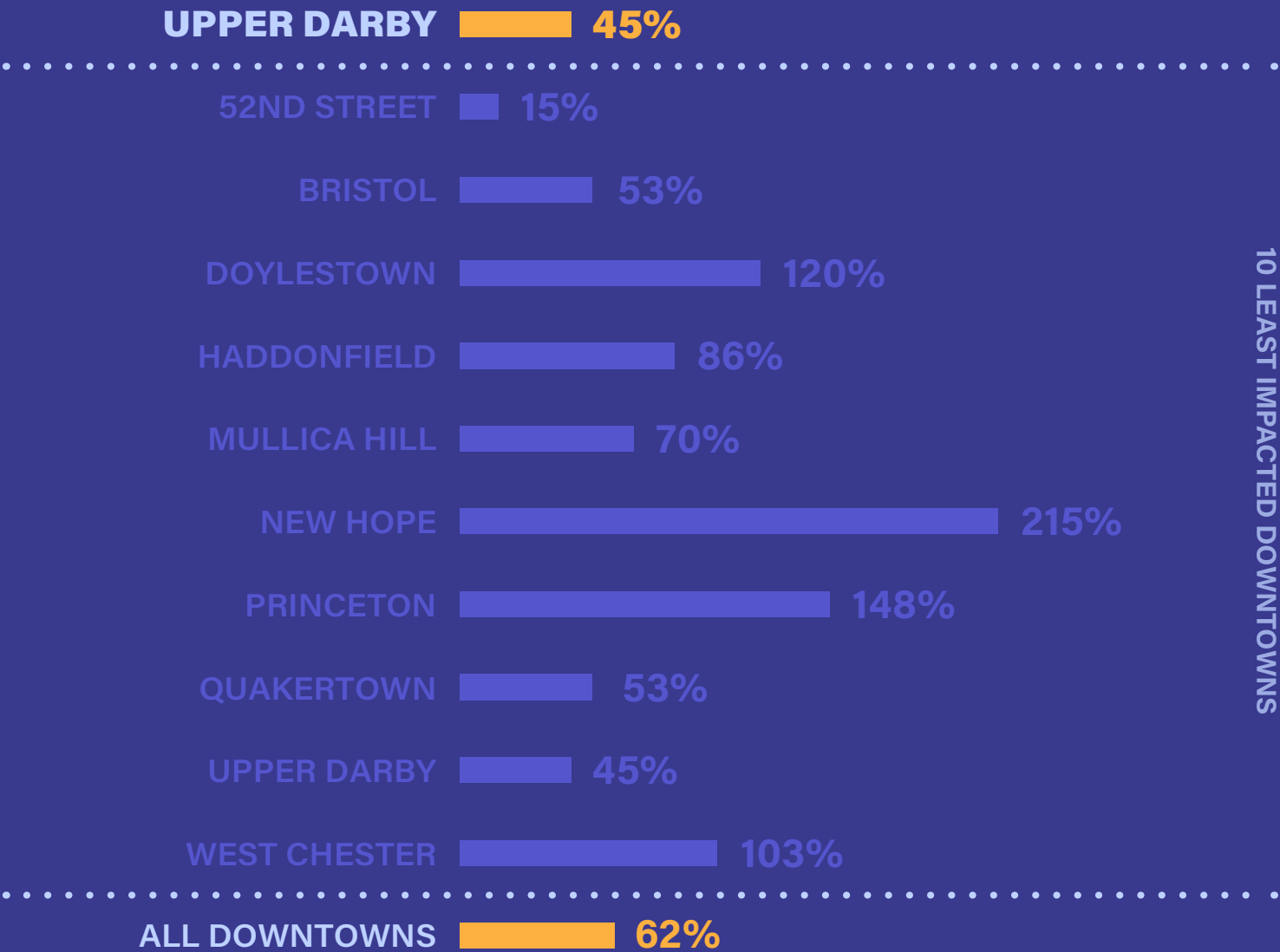
Visits to Upper Darby increased by 45% during the reopening period to a total of 2,642 visits. This was 75% fewer than the 10,701 visits that occurred during the same period in 2019.

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)

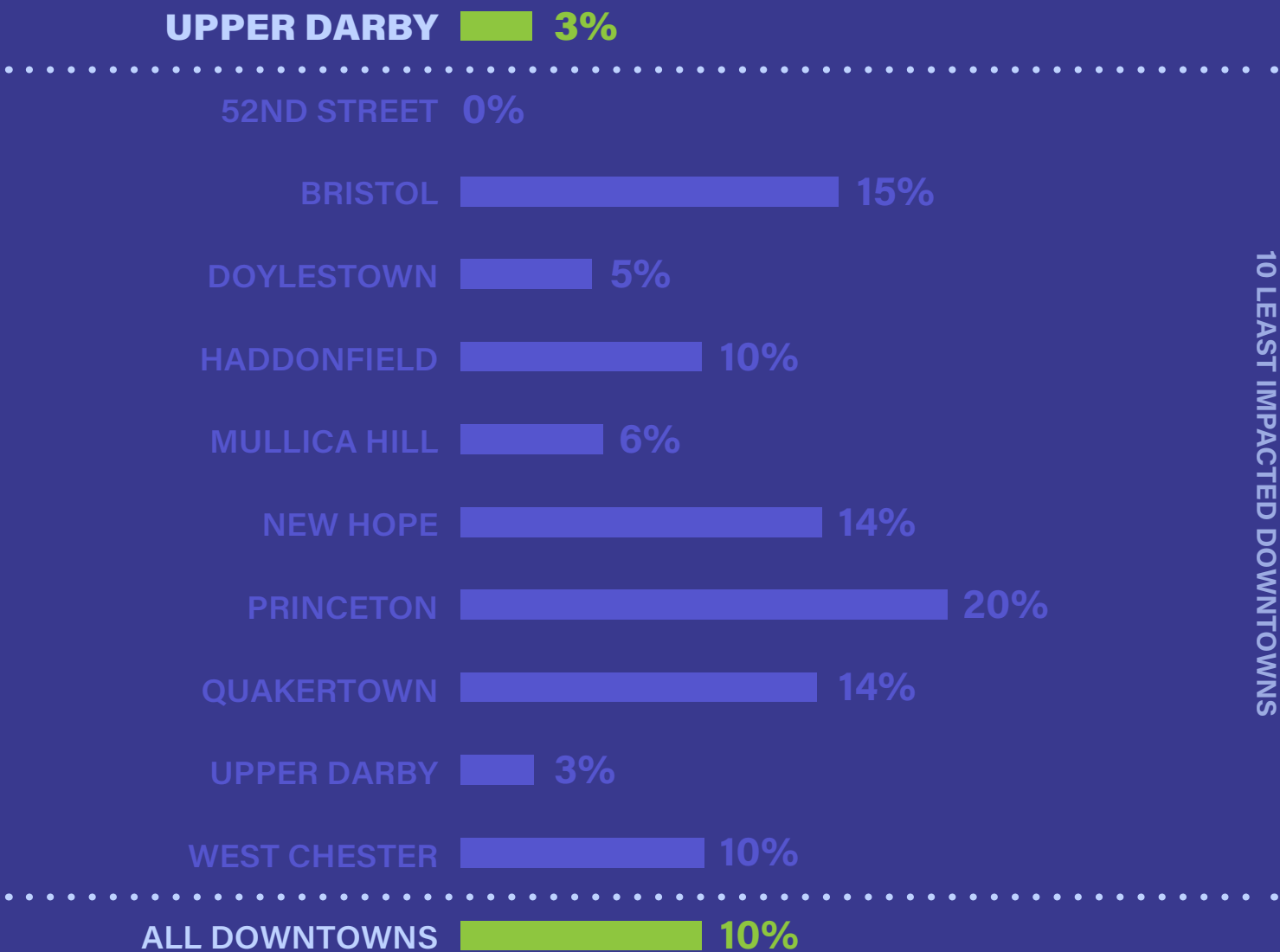
Upper Darby’s pre-pandemic trade area was a 34 minute drive time, which shrank by 12% during the shutdown to 30 minutes. The trade area recovered by 3% during the reopening period to 31 minutes.

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