

# 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 | Ambler 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.

Ambler's downtown scores 49 for diversity, which is average. Despite its walkable built environment, cultural uses, and mix of retail types, which add to its diversity, Ambler was one of the most impacted downtowns in the region with a Pandemic Impact Score of 61.

Despite being somewhat diverse, impacts to SEPTA ridership and the student population at Temple's Ambler campus most likely had ripple effects in the downtown as *Transit-Oriented* and *College* downtowns were the most impacted. Additionally, a healthier mix of local and chain retailers, as well as more residential uses, were characteristics of the least impacted downtowns.

49

## Diversity Score

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

61

## Pandemic Impact Score

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

# Types of Downtowns

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).

Ambler is considered to be four of these typologies: *Brewery*, *Classic*, *Historic*, and *Transit-Oriented*, as Temple's campus is too far for it to be considered a *College* downtown as well.

On average, the more typologies that a downtown fell into, the lower the Pandemic Impact Score. Downtowns that are considered to be four typologies on average had a Pandemic Impact Score of 44, which is 17 points lower than Ambler's score of 61.

**BREWERY** 45

CIRCUIT 48

**CLASSIC** 46

COLLEGE 50

CORE 43

EXPANDING 42

**HISTORIC** 47

OPPORTUNITY 45

**TRANSIT-ORIENTED** 50

# Livable Downtowns

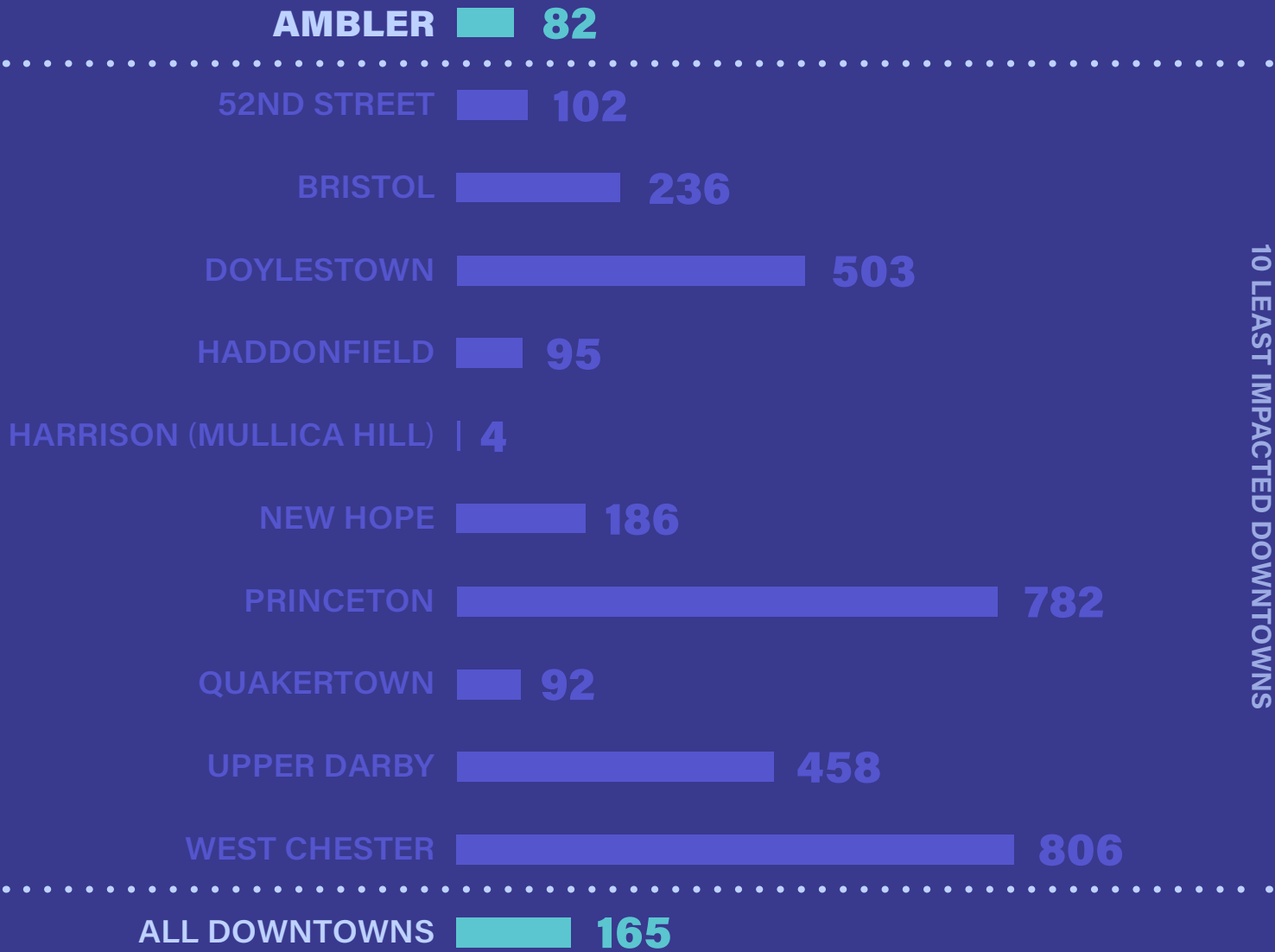
A negative correlation between the estimated population of the region’s downtowns and the Pandemic Impact Score was identified. In other words, the larger the downtown population, the smaller the impact.

In 2019, Ambler’s downtown population was estimated to be 82, which is approximately half of the average for all downtowns (165 residents) and nearly four times smaller than the average population of the least impacted downtowns (326 residents).

Ambler’s downtown population is relatively diverse with regards to demographics, with the White, Black, and Hispanic populations accounting for 75%, 12%, and 8% respectively.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

## Mix of Uses

Retail accounts for 76% of the uses in Ambler's downtown, which is one of the highest shares observed. On average retail accounts for 57% of uses, and it accounts for 60% of uses in the least impacted downtowns.

Although retail as a whole makes up a higher share in Ambler, the mix of retail types in Ambler's downtown is similar to that of the least impacted downtowns, with *Food & Beverage (FB)* equal at 30%, *General Merchandise, Apparel, Furnishings, & Other (GAFO)* making up a slightly larger share at 38%, and *Neighborhood Goods & Services (NGS)* a smaller share at 30% on average.

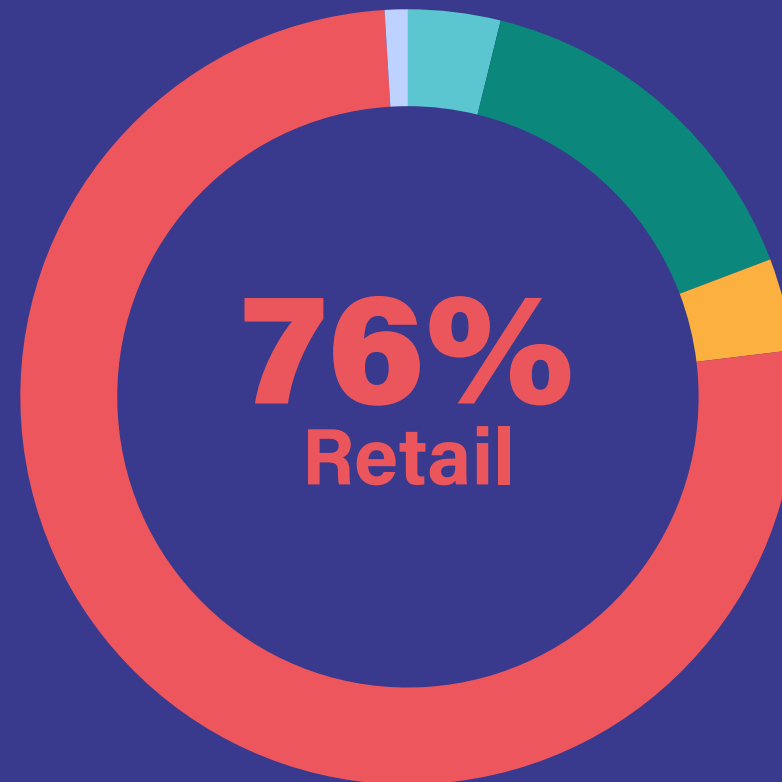
In general, the greater the share of NGS retail or the higher the vacancy rate, the higher the Pandemic Impact Score.

### Retail Mix:

**30%**  
Food & Beverage (FB)

**35%**  
General Merchandise,  
Apparel, Furnishings,  
& Other (GAFO)

**34%**  
Neighborhood Goods  
& Services (NGS)



**0%**  
Civic

**4%**  
Cultural

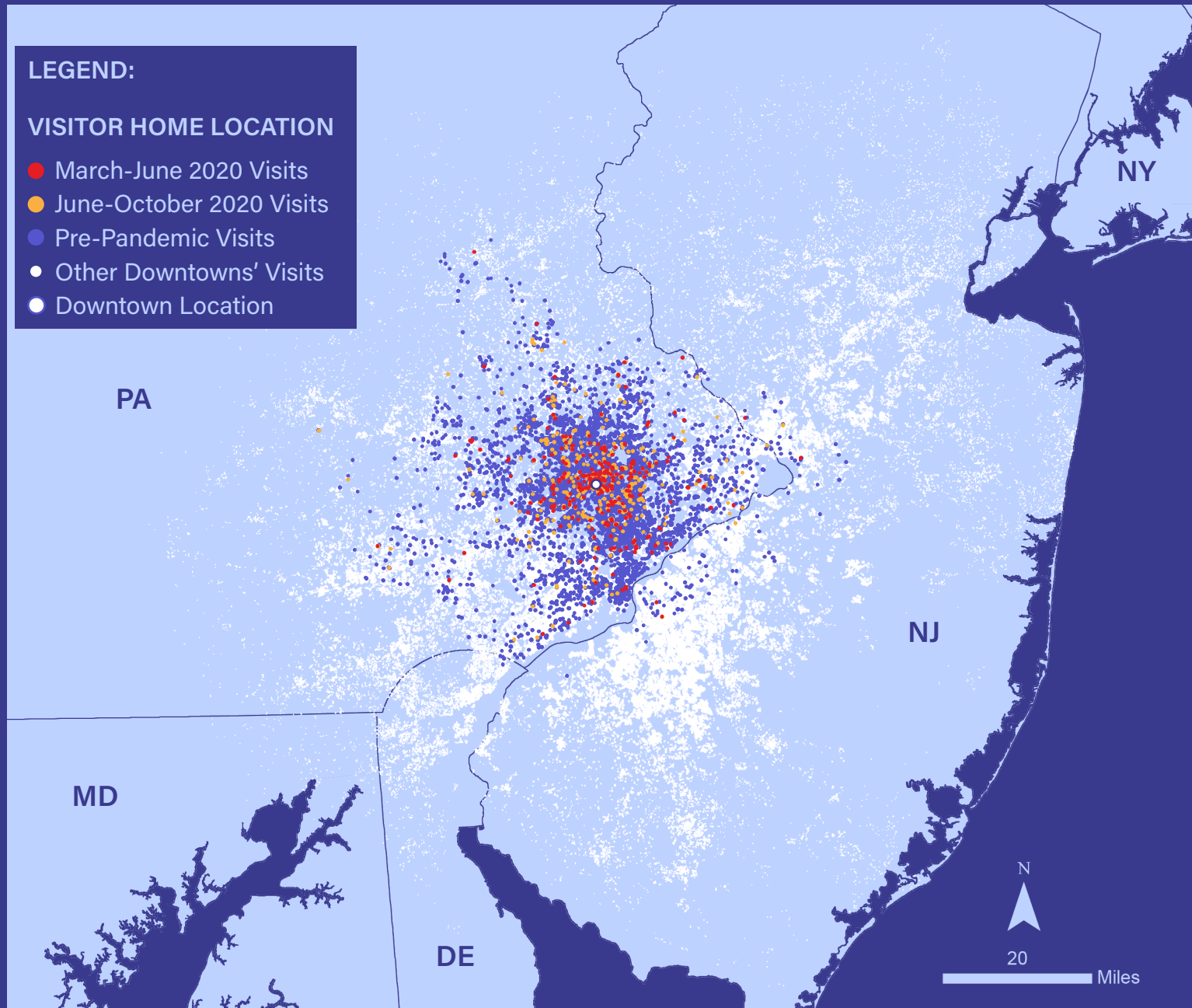
**0%**  
Institutional

**15%**  
Office

**4%**  
Residential

**1%**  
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 Ambler were as follows:

### ● Pre-Pandemic

Delaware: 0.0%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 98.7%
New Jersey: 1.3%	

### ● Shutdown | March 13 - June 15, 2020

Delaware: 0.0%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 98.7%
New Jersey: 1.3%	

### ● Reopening | June 16 - October 31, 2020

Delaware: 0.0%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 99.4%
New Jersey: 0.6%	



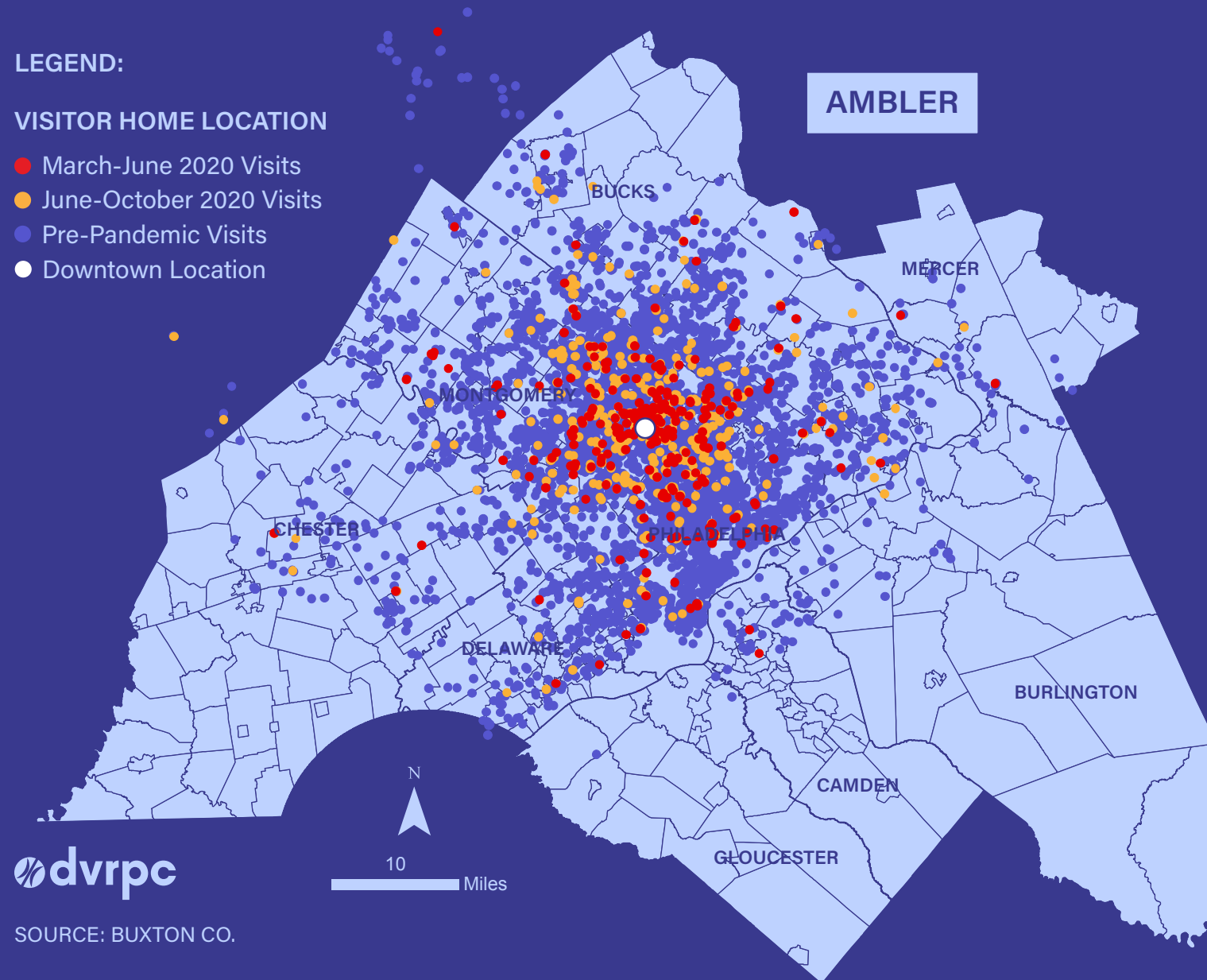
SOURCE: BUXTON CO.



LEGEND:

VISITOR HOME LOCATION

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



SOURCE: BUXTON CO.

## Visits to Downtown

Prior to the pandemic, people visiting Ambler's downtown lived in all nine of the region's counties and beyond, but most visitors came from within Montgomery County.

Between August 2018 and March 2020, 9,495 people visited the downtown. This was slightly more than the average of 8,800 for all of the downtowns.

During the shutdown (March 13 - June 15) there were 359 visits to Ambler's downtown, and during the reopening period (June 16 - October 31) there were 577 visits.

# Shutdown Impact

March 13 - June 15, 2020

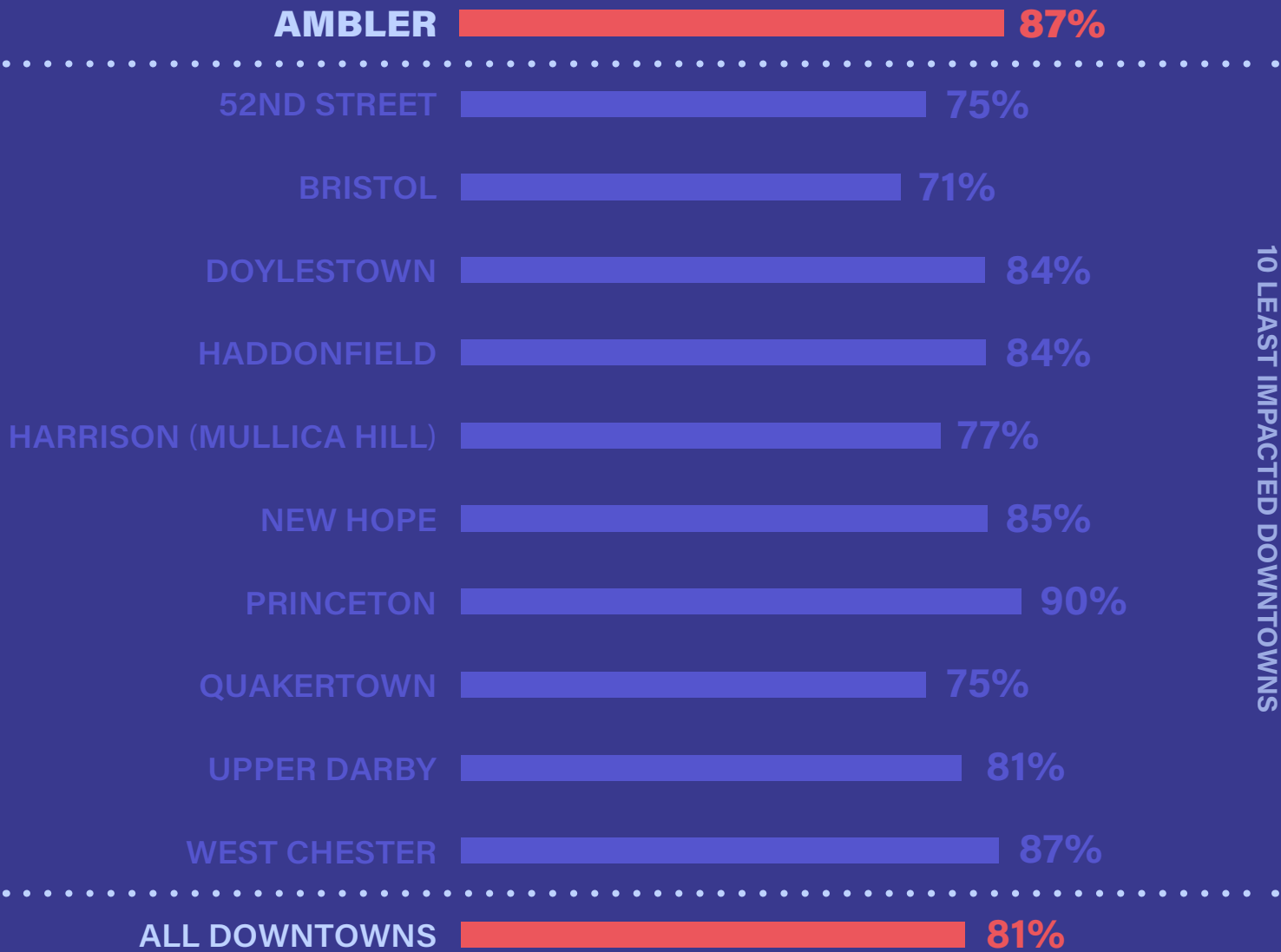
During the economic shutdown, there were 359 visits to Ambler’s downtown compared to 2,764 visits during the same period in 2019. This equated to an 87% reduction.

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%.

With 432 visits during the shutdown, compared to 1,268 during the same period in 2019, Gloucester City’s downtown had the smallest reduction in visits at 66%.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

# Reopening Rebound

June 16 - October 31, 2020

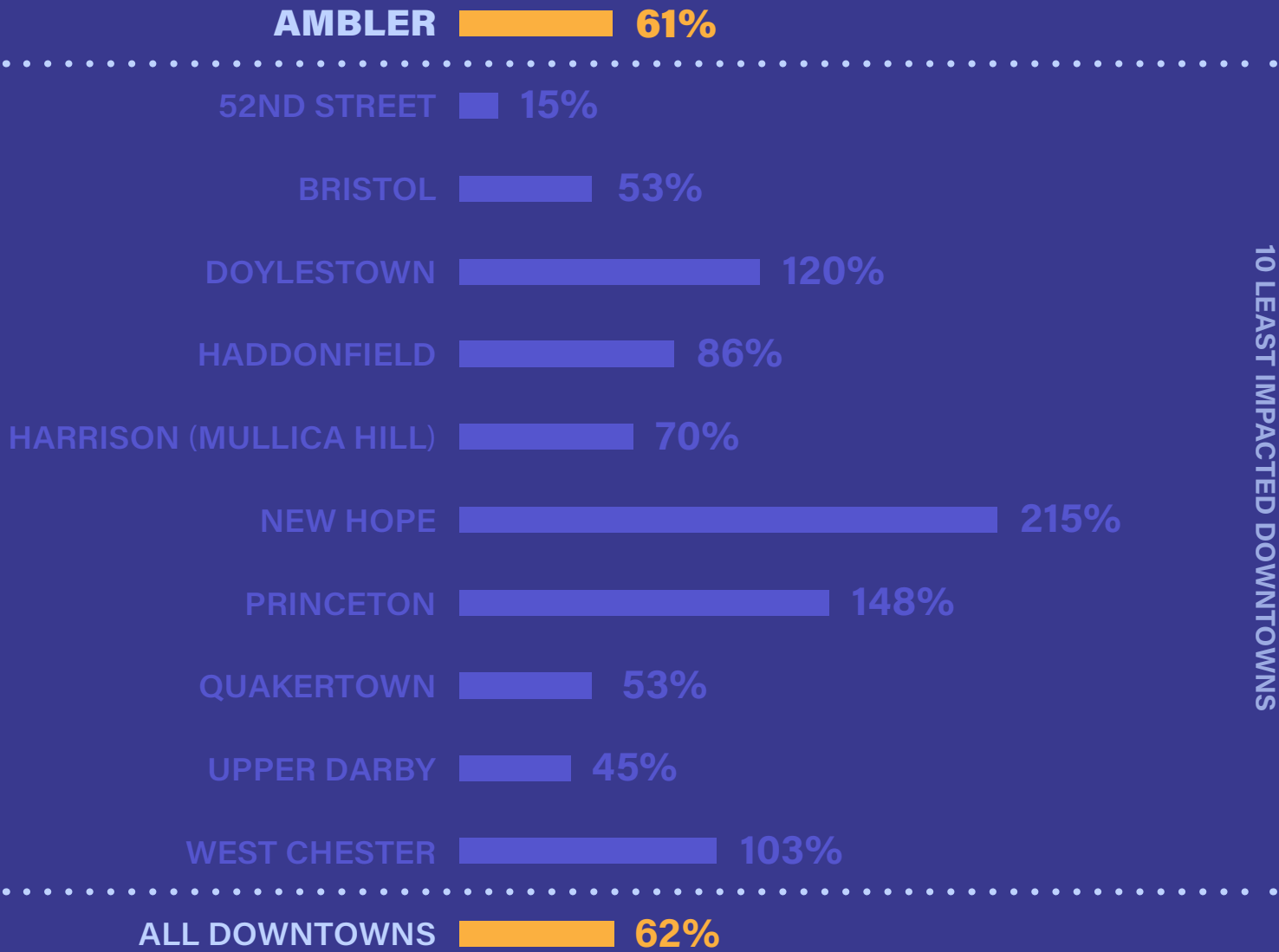
Visits to Ambler’s downtown increased by 61% during the reopening period to a total of 577 visits, which was still 82% fewer than the 3,266 visits that occurred during the same period in 2019.

On average, visits increased by 62% for all 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.



# Trade Area Recovery

(Drive Time in Minutes)

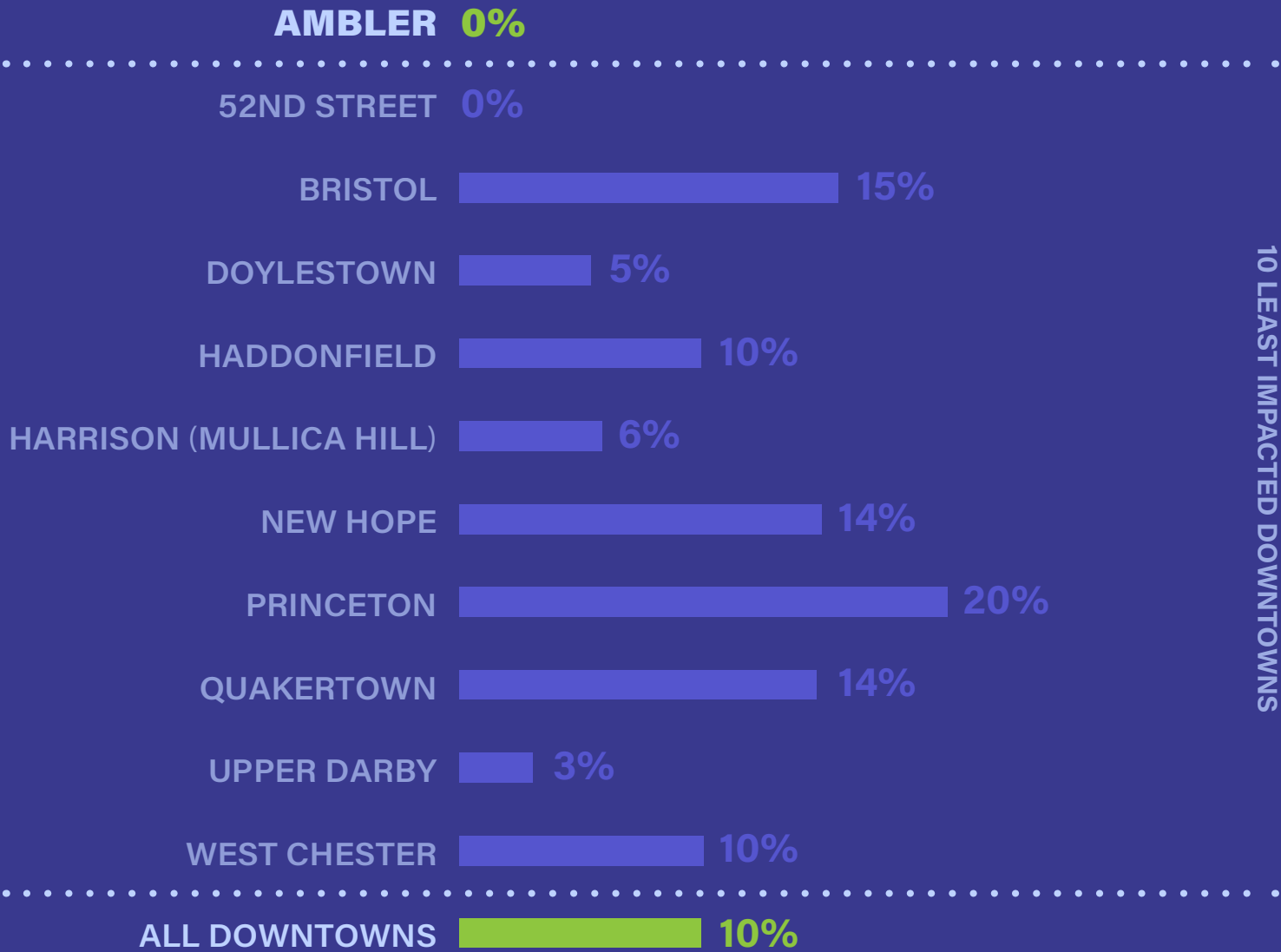
Ambler’s trade area before the pandemic was a 34 minute drive time, which shrank by 21% during the shutdown to a drive time of 27 minutes and did not recover during the reopening period.

The average pre-pandemic trade area was 31 minutes, with a 23% reduction during the shutdown down to 24 minutes. The average trade area recovery during reopening was 10% to a drive time of 27 minutes.

At 69 minutes, New Hope was the only downtown with a trade area that extended beyond an hour. It was also the only downtown to have a larger trade area during reopening (72 minutes) than it did pre-pandemic.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS