

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 | Philadelphia (52nd Street), 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.

Philadelphia's 52nd Street is a walkable downtown and benefits from its residential population. The downtown also has a number of civic, cultural, and office uses, but retail makes up a relatively high share of the uses, compared to other downtowns. Lastly, 52nd Street has not seen the development and economic diversification that some of the least impacted downtowns have seen in recent years. Therefore, the downtown received an average Diversity Score of 48.

Despite its average Diversity Score, 52nd Street was one of the 10 least impacted downtowns with a Pandemic Impact Score of 33.



48

Diversity Score

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



33

Pandemic Impact Score

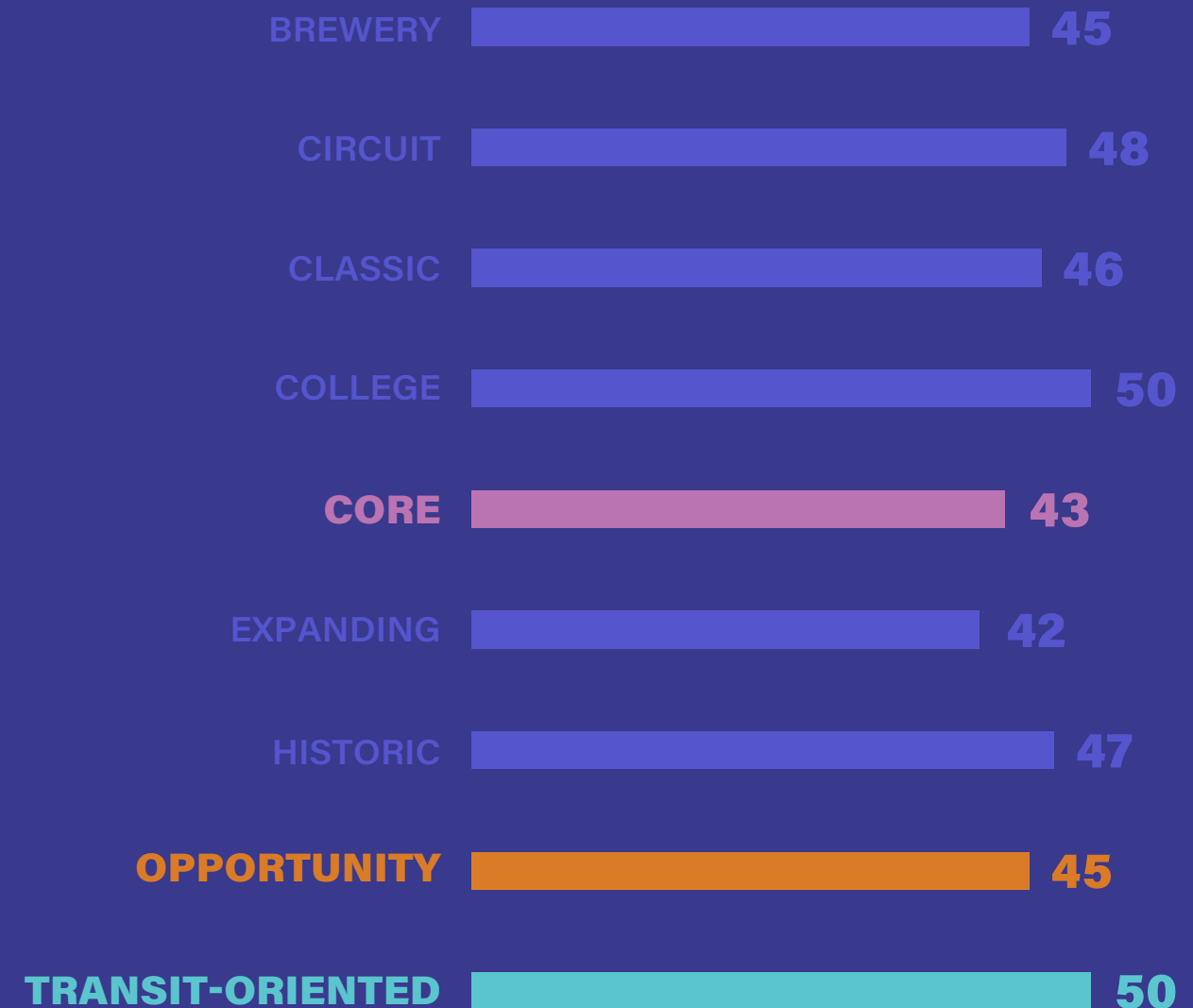
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

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. 52nd Street is considered to be three typologies: *Core*, *Opportunity* (falls within an Opportunity Zone), and *Transit-Oriented*. Downtowns considered to be three typologies had an average Pandemic Impact Score of 53.

Although *Transit-Oriented* downtowns were most impacted, the *Core* and *Opportunity* downtowns were some of the most resilient.



Downtown Population

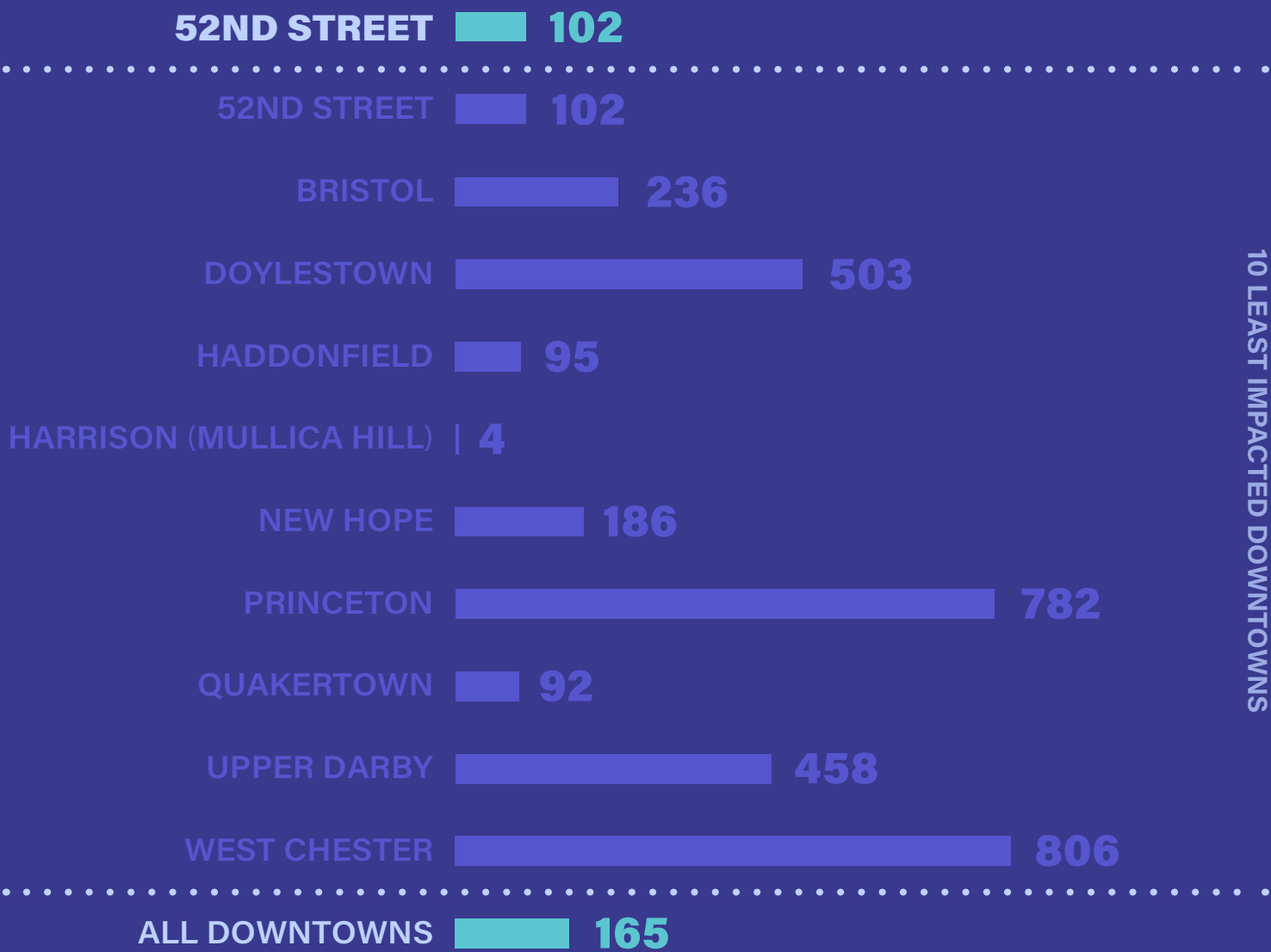
A negative correlation between the estimated population of the region’s downtowns and the Pandemic Impact Score was identified. In other words, the larger the downtown population, the smaller the impact.

In 2019, 52nd Street’s downtown population was estimated to be 102, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.

It is worth noting that the immediate neighborhoods have a relatively dense residential population, which most likely helped support 52nd Street during the pandemic.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

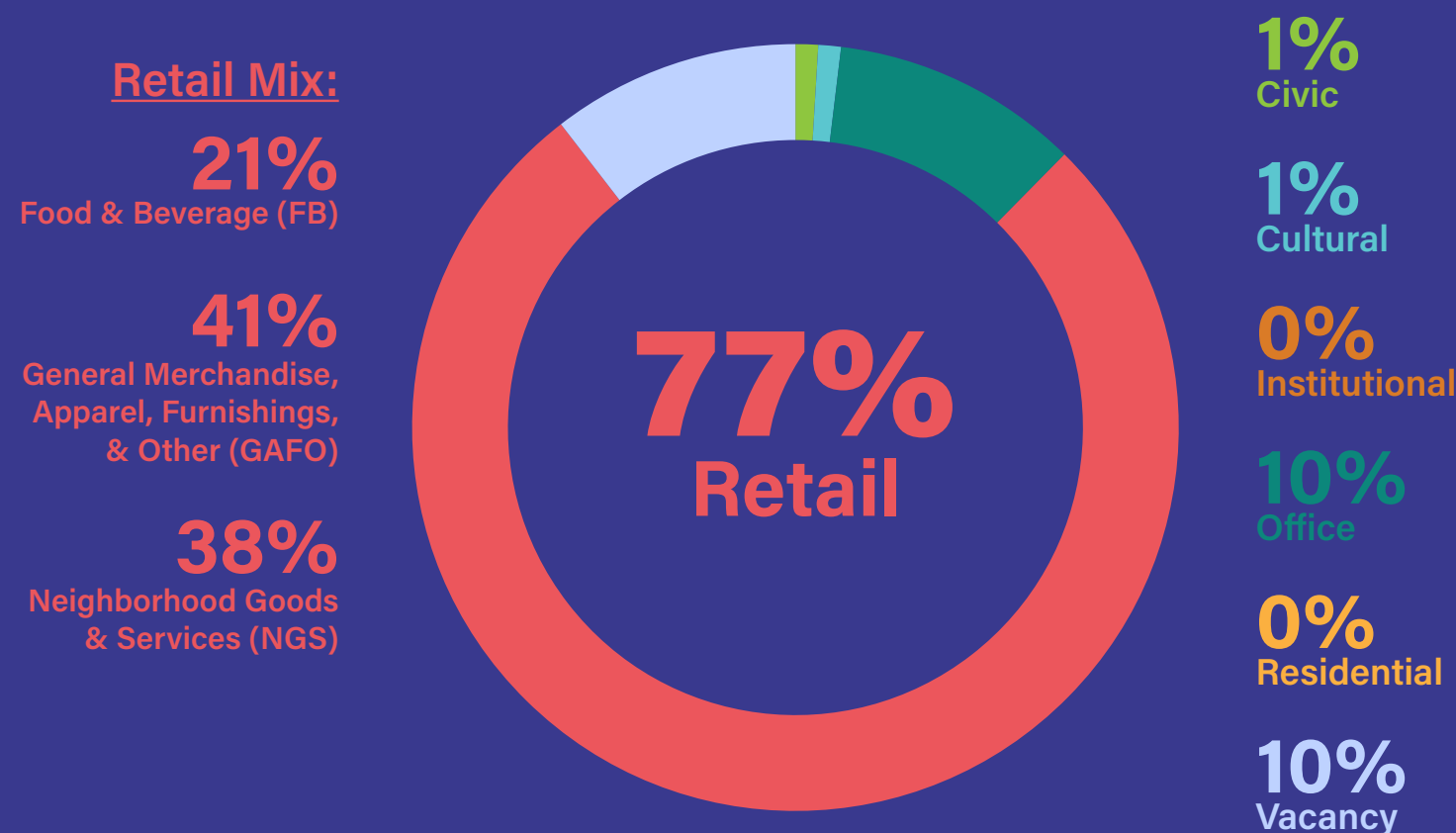
Mix of Uses

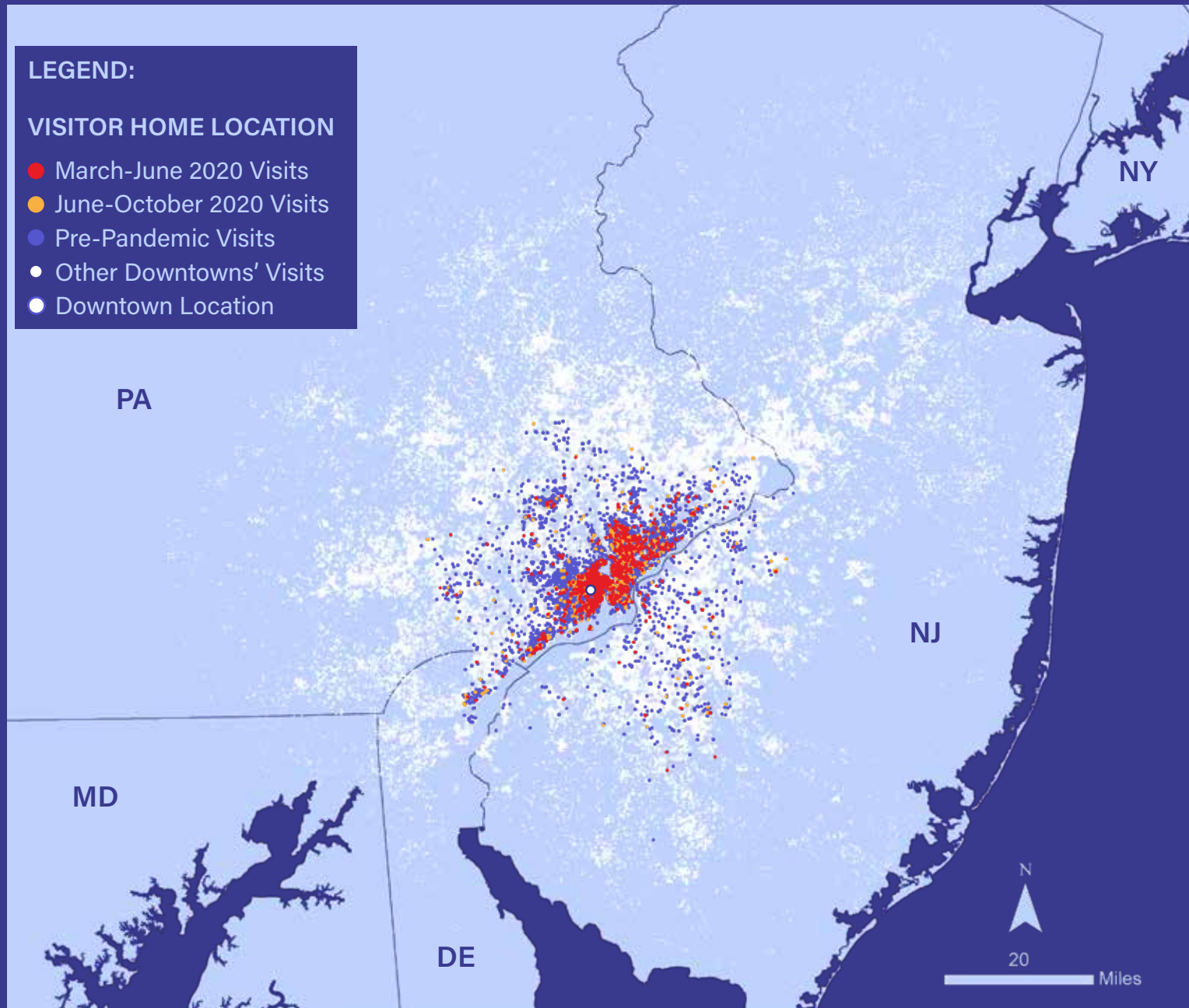
Retail accounts for 77% of the uses along 52nd Street, which is one of the highest shares observed. The average was 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage (FB)* makes up a significantly larger share of retail uses at 30%, while *General Merchandise, Apparel, Furnishings & Other (GAFO)* makes up a slightly smaller share 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 a smaller share than in 52nd Street.

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





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 52nd Street were as follows:

● Pre-Pandemic

Delaware: 0.6%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 96.8%
New Jersey: 2.6%	

● Shutdown | March 13 - June 15, 2020

Delaware: 0.4%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 97.4%
New Jersey: 2.2%	

● Reopening | June 16 - October 31, 2020

Delaware: 0.7%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 97.3%
New Jersey: 2.0%	

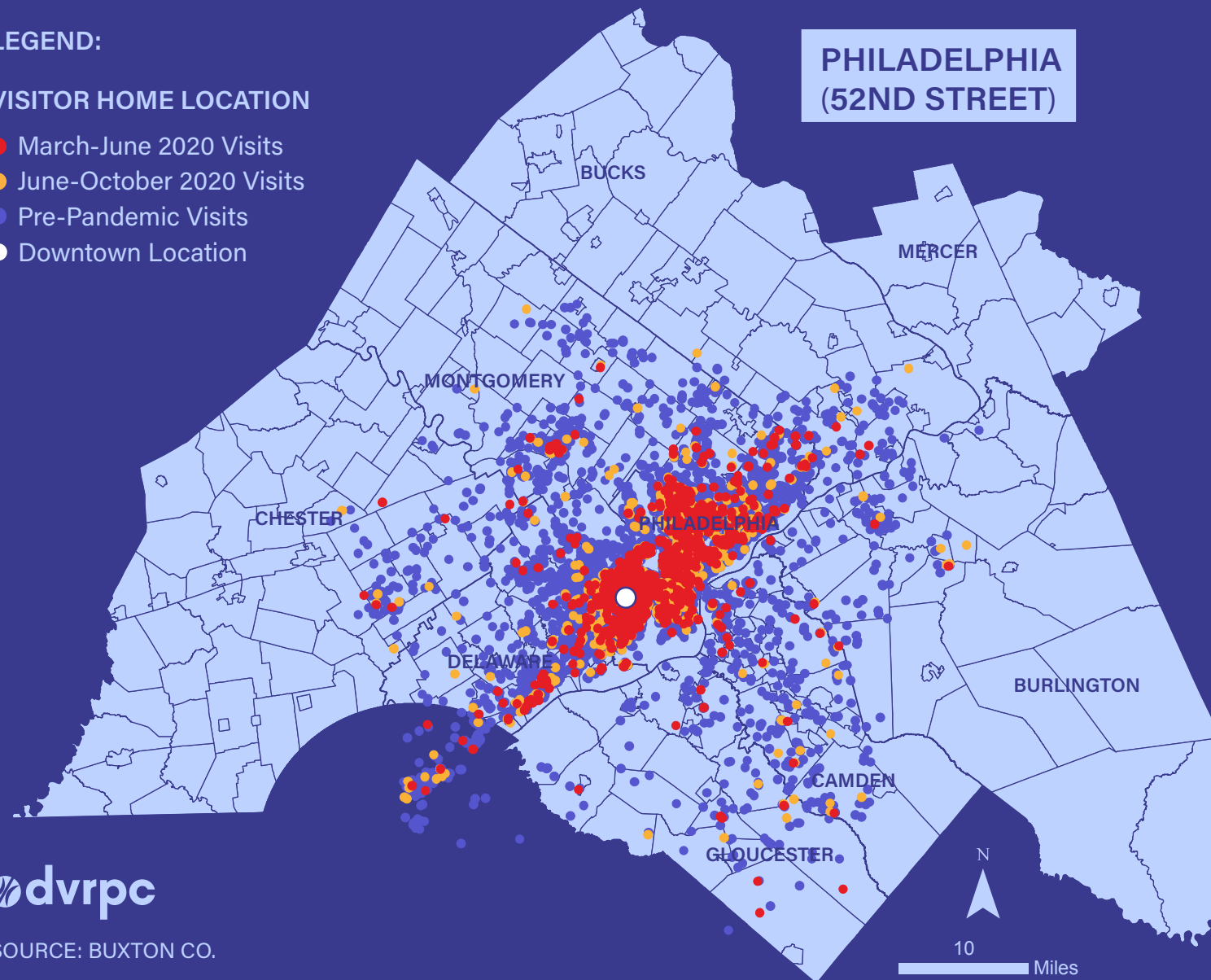


SOURCE: BUXTON CO.

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 52nd Street primarily came from Delaware, Montgomery, and Philadelphia Counties in Pennsylvania, and Camden County in New Jersey. However, during the pandemic, most visitors came from Delaware and Philadelphia Counties.

Between August 2018 and March 2020, 21,114 people visited the downtown, which is significantly more than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 1,595 visits, and during the reopening period (June 16 - October 31) there were 1,842 visits to 52nd Street.

Shutdown Impact

March 13 - June 15, 2020

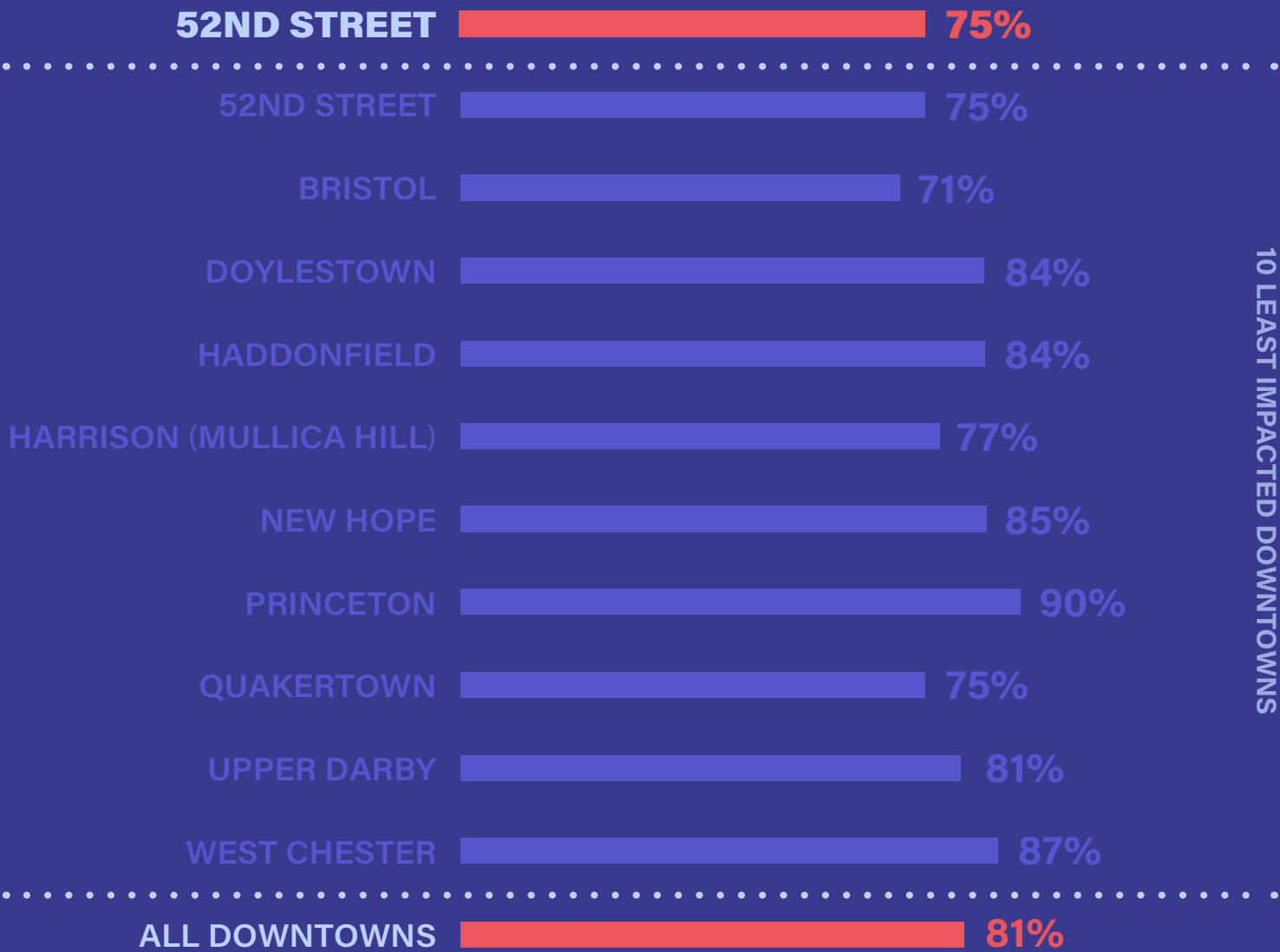
During the economic shutdown, there were 1,595 visits to 52nd Street compared to 6,324 visits during the same period in 2019. This equated to a 75% reduction.

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

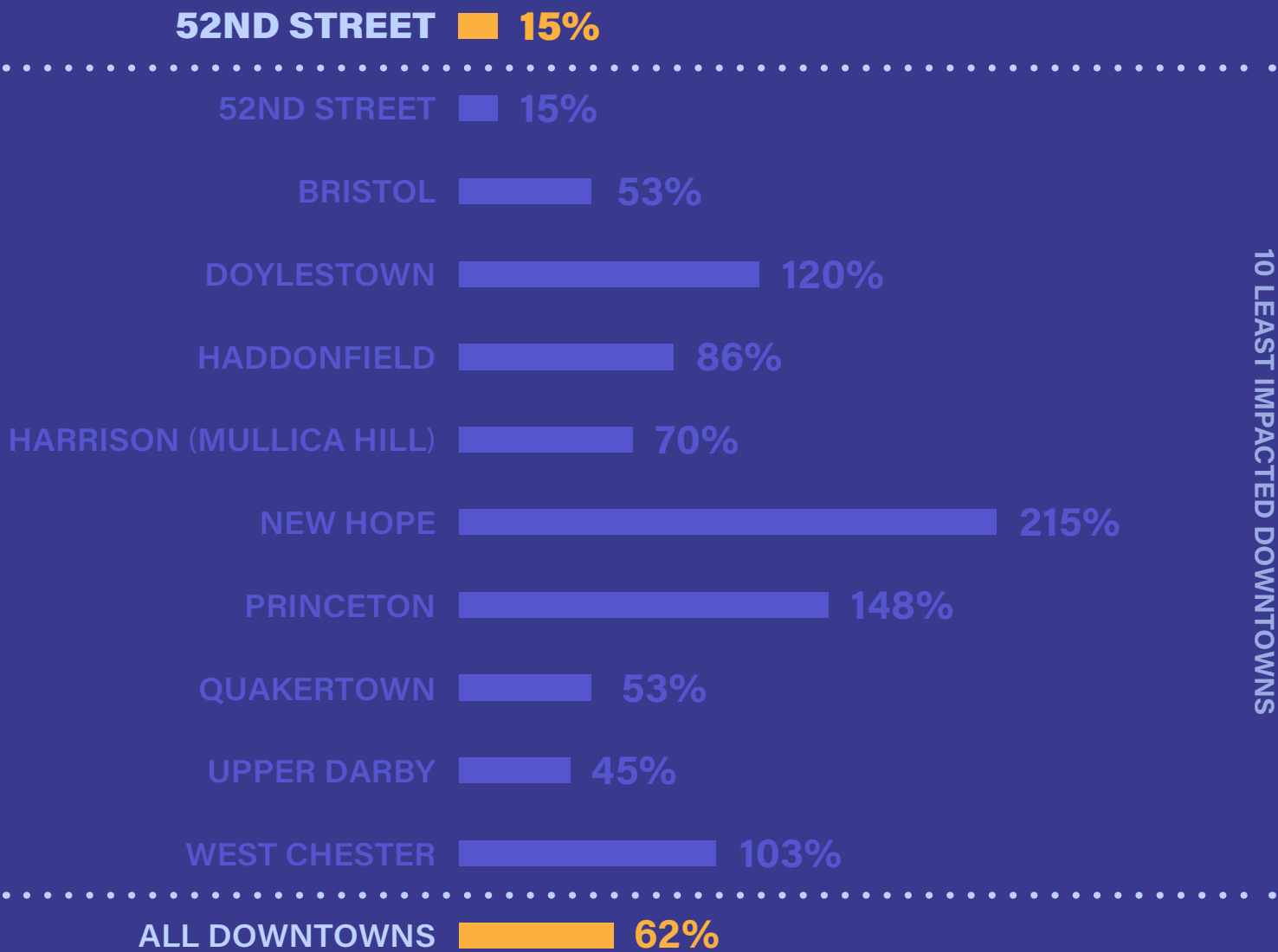
Visits to 52nd Street increased by 15%, one of the smallest rebounds observed, during the reopening period to a total of 1,842 visits. This was 74% fewer than the 7,120 visits that occurred during the same period in 2019.

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)

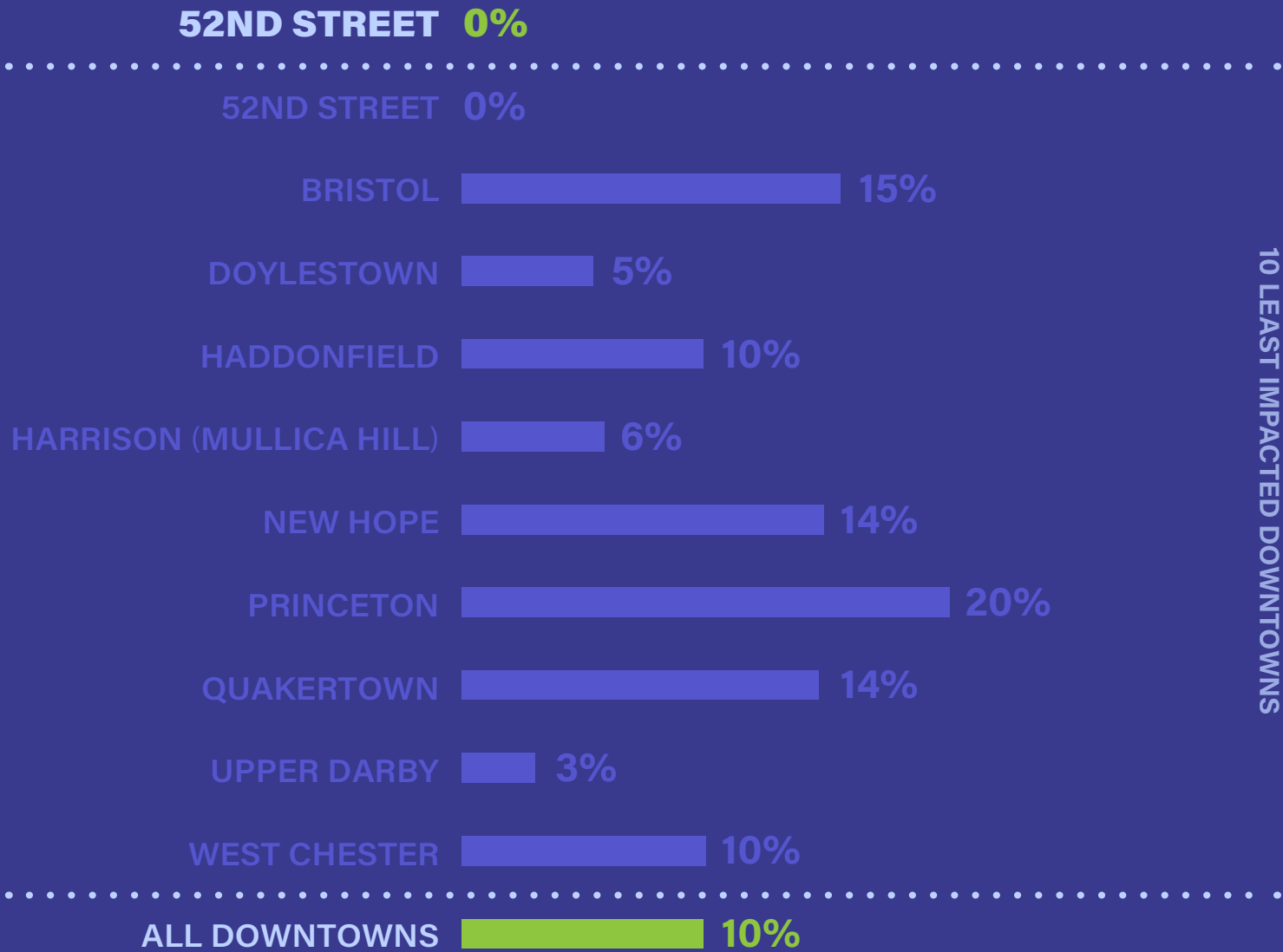
52nd Street’s pre-pandemic trade area was a 31 minute drive time, which shrank by 10% during the shutdown to 28 minutes. 52nd Street was one of the only downtowns to not experience a trade area recovery during the reopening period.

The average pre-pandemic trade area was 31 minutes, with a 23% reduction during the shutdown down to 24 minutes. The average 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