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.

DELAWARE VALLEY dvrpc REGIONAL PLANNING COMMISSION

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.

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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.

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Diverse Downtowns | Lower Merion Township (Ardmore), 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.

Ardmore's walkable downtown has a relatively diverse residential population, and a healthy mix of uses, types of retail, and chain and local retailers. These qualities are why the downtown received a Diversity Score of 31, which makes it one of the most diverse downtowns in the region.

These qualities most likely played a role in mitigating the pandemic's impact on the downtown, and resulted in Ardmore recieving a Pandemic Impact Score of 38. Of the 75 downtowns analyzed, only 11 were impacted less than Ardmore.

Diversity Score

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

Pandemic Impact Score

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

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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. Ardmore is considered to be five typologies: *Brewery, Classic, Expanding, Historic,* and *Transit-Oriented.* Downtowns that are considered to be five typologies had an average Pandemic Impact Score of 42.

Ardmore is considered to be *Expanding* due to development that has occurred in recent years, which most likely helped mitigate the impacts of the pandemic as this typology was the least impacted.

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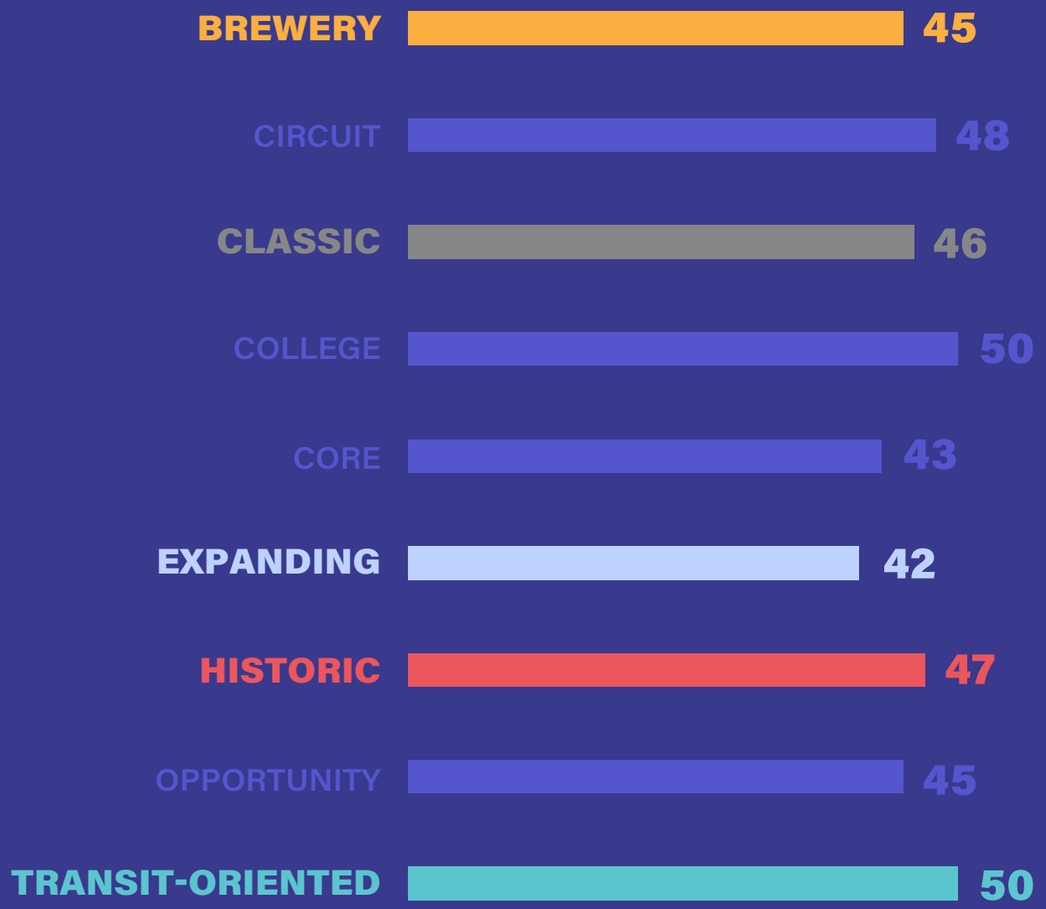

Downtown Population

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, Ardmore's population was estimated to be 98, compred to the average of 165 for all downtowns and 326 for the least impacted downtowns. Although, this estimate is most likely low given recent development in the downtown.

Ardmore's population is relatively diverse with regards to demographics, with the White, Black, and Hispanic populations accounting for 74%, 10%, and 10% respectively.

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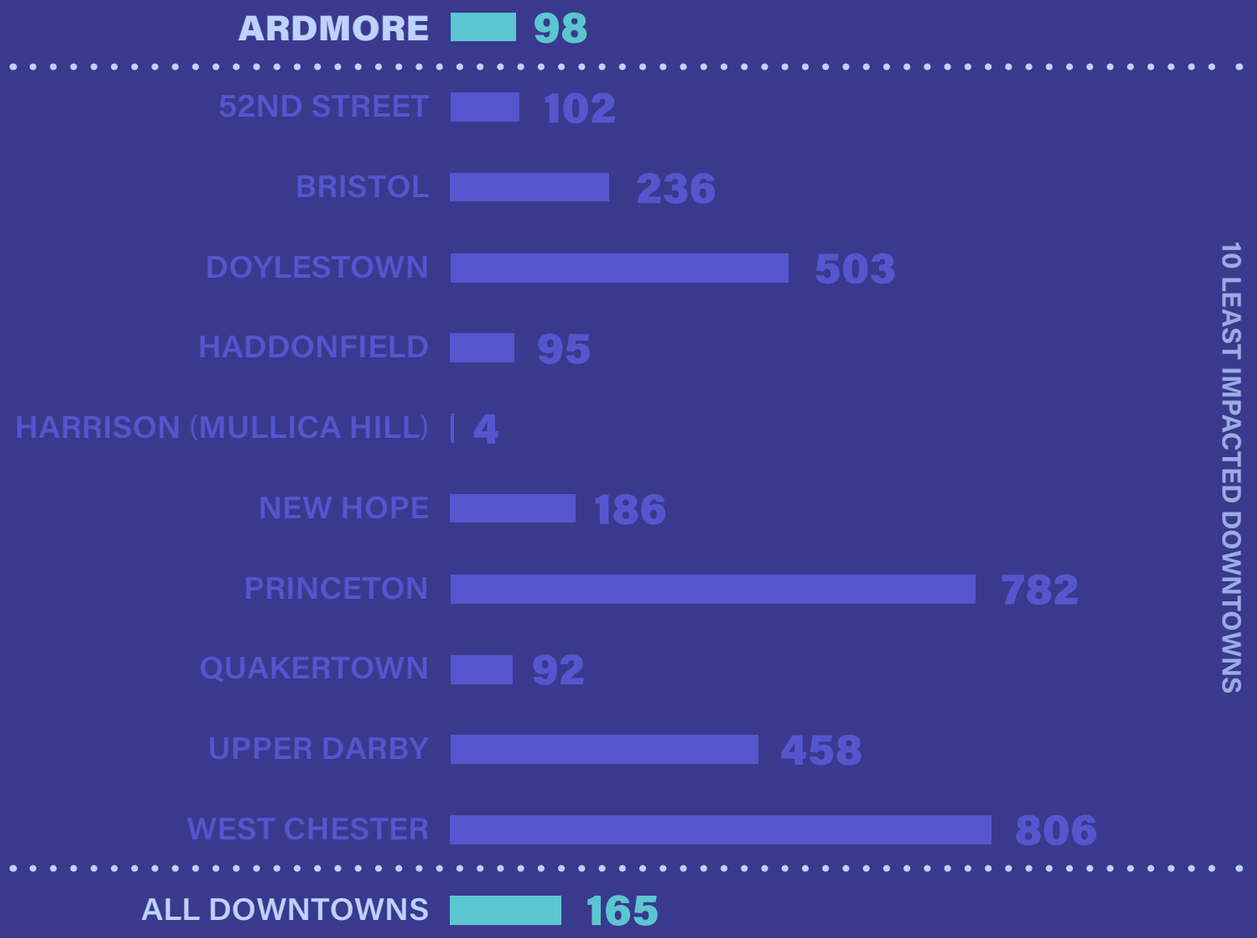
SOURCE: BUXTON CO.



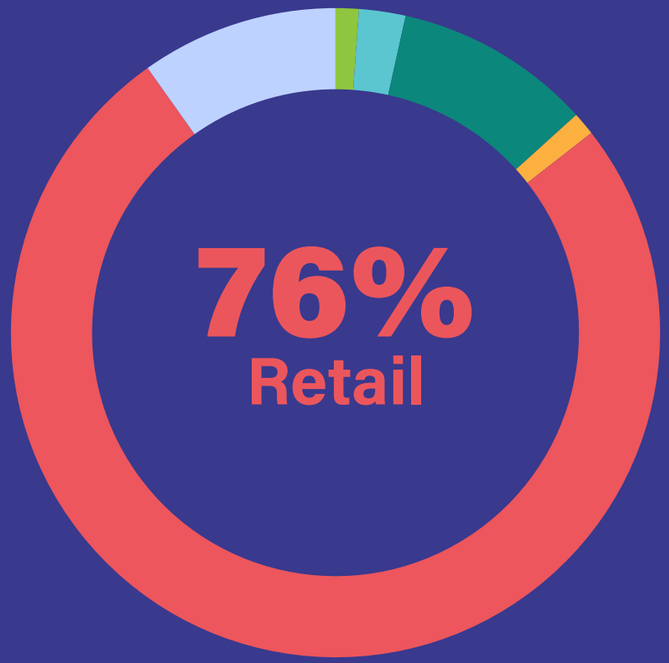
Mix of Uses

Retail Mix:

31%
Food & Beverage (FB)

40%
General Merchandise, Apparel, Furnishings, & Other (GAFO)

28%
Neighborhood Goods & Services (NGS)



1%
Civic

2%
Cultural

0%
Institutional

10%
Office

1%
Residential

10%
Vacancy

Retail accounts for 76% of the uses in Ardmore, which is higher than both the average of 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, both *Food & Beverage* (FB) and *General Merchandise, Apparel, Furnishings & Other* (GAFO) retailers account for slightly less at 30% and 38% respectively. Conversely, in the least impacted downtowns, *Neighborhood Goods & Services* (NGS) retailers made up a slightly larger share on average at 30%. This most likely conrtibuted to Ardmore's resiliency given that in general, as the share of NGS retailers increased so did the Pandemic Impact Score.

Additionally, the least impacted downtowns had an average vacancy rate below 8%, and in general as the vacancy rate increased so did the Pandemic Impact Score.

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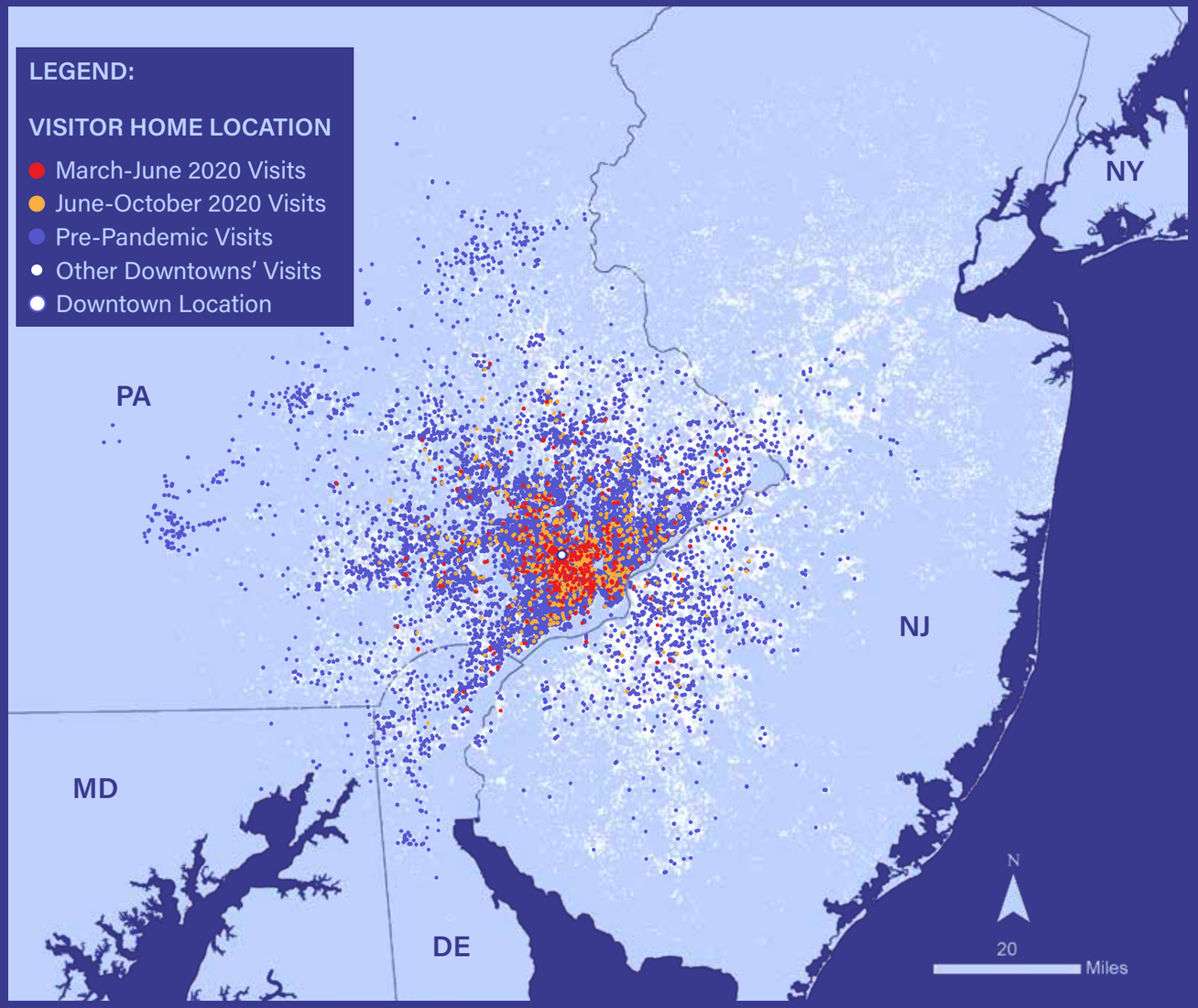

Visits to Downtown

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 Ardmore were as follows:

- **Pre-Pandemic**

  Delaware: 1.9%
  Maryland: 0.1%
  New Jersey: 4.8%
  New York: 0.0%
  Pennsylvania: 93.1%

- **Shutdown** | March 13 - June 15, 2020

  Delaware: 1.3%
  Maryland: 0.0%
  New Jersey: 2.5%
  New York: 0.0%
  Pennsylvania: 96.2%

- **Reopening** | June 16 - October 31, 2020

  Delaware: 0.5%
  Maryland: 0.0%
  New Jersey: 2.4%
  New York: 0.0%
  Pennsylvania: 97.1%

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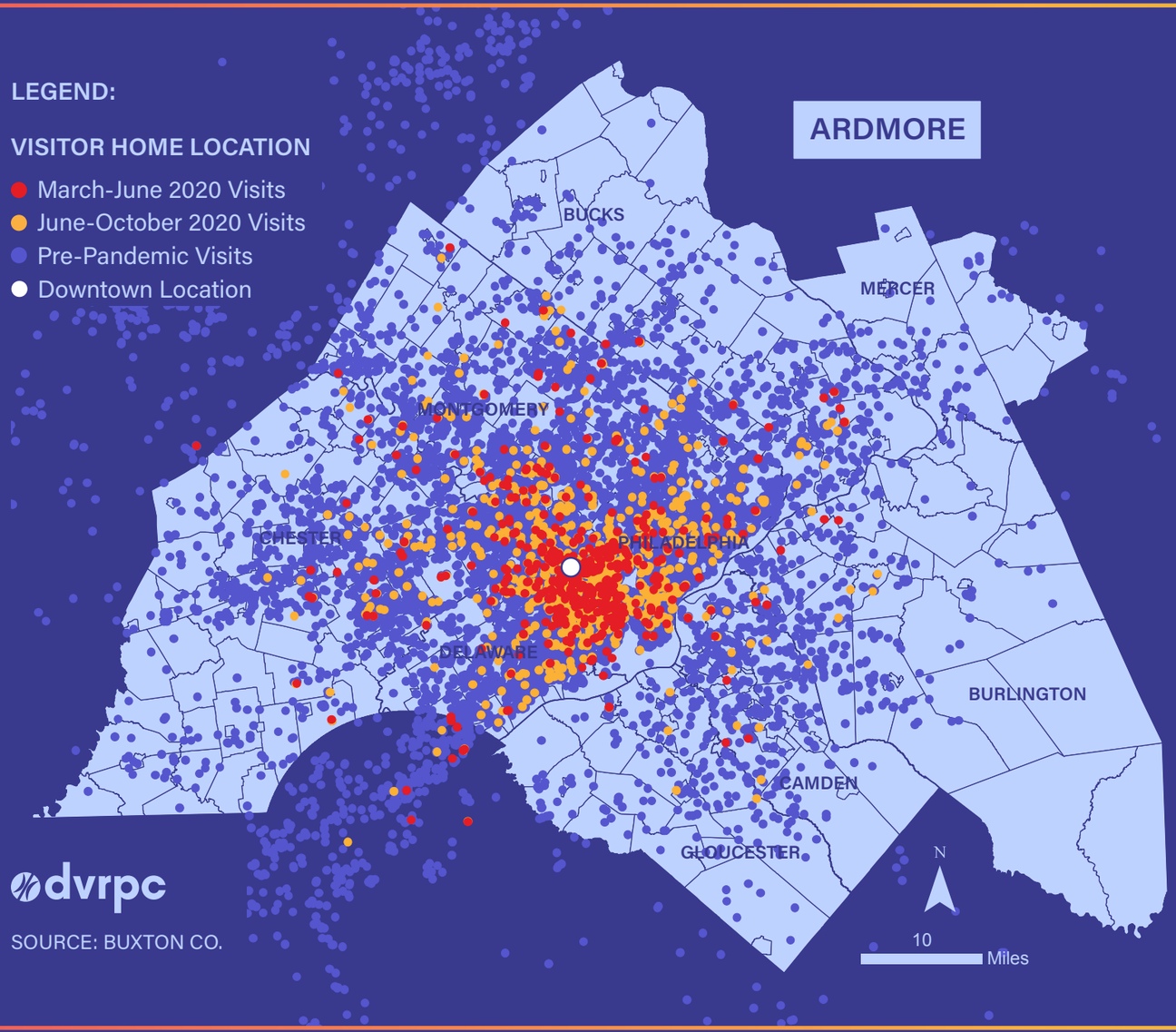
SOURCE: BUXTON CO.



Visits to Downtown

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

Between August 2018 and March 2020, 23,762 people visited the downtown. This is nearly three times more than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 610 visits, and during the reopening period (June 16 - October 31) there were 1,382 visits to Ardmore.

Shutdown Impact

March 13 - June 15, 2020

During the economic shutdown, there were 610 visits to Ardmore compared to 6,763 visits during the same period in 2019. This equated to a 91% 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%.

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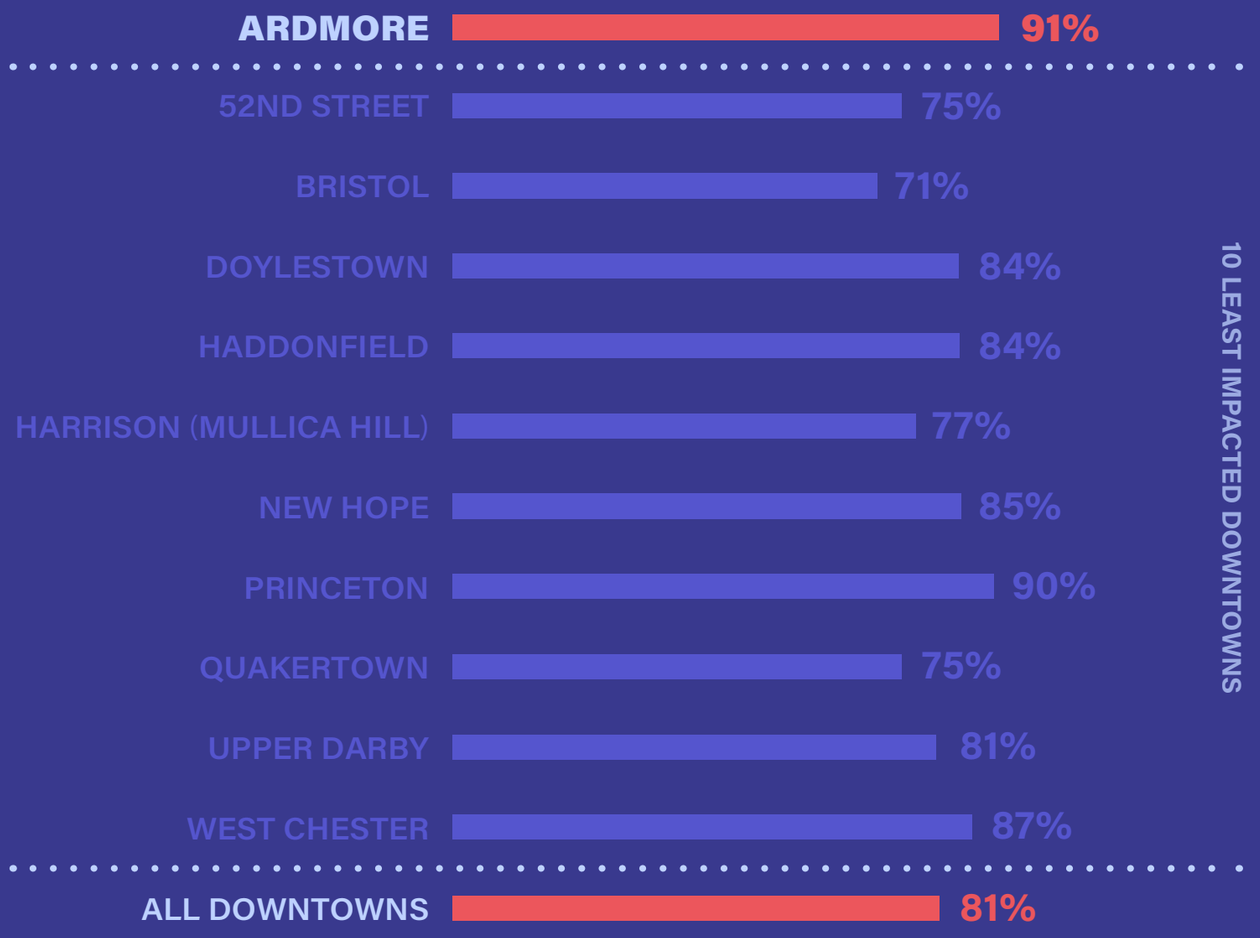
SOURCE: BUXTON CO.



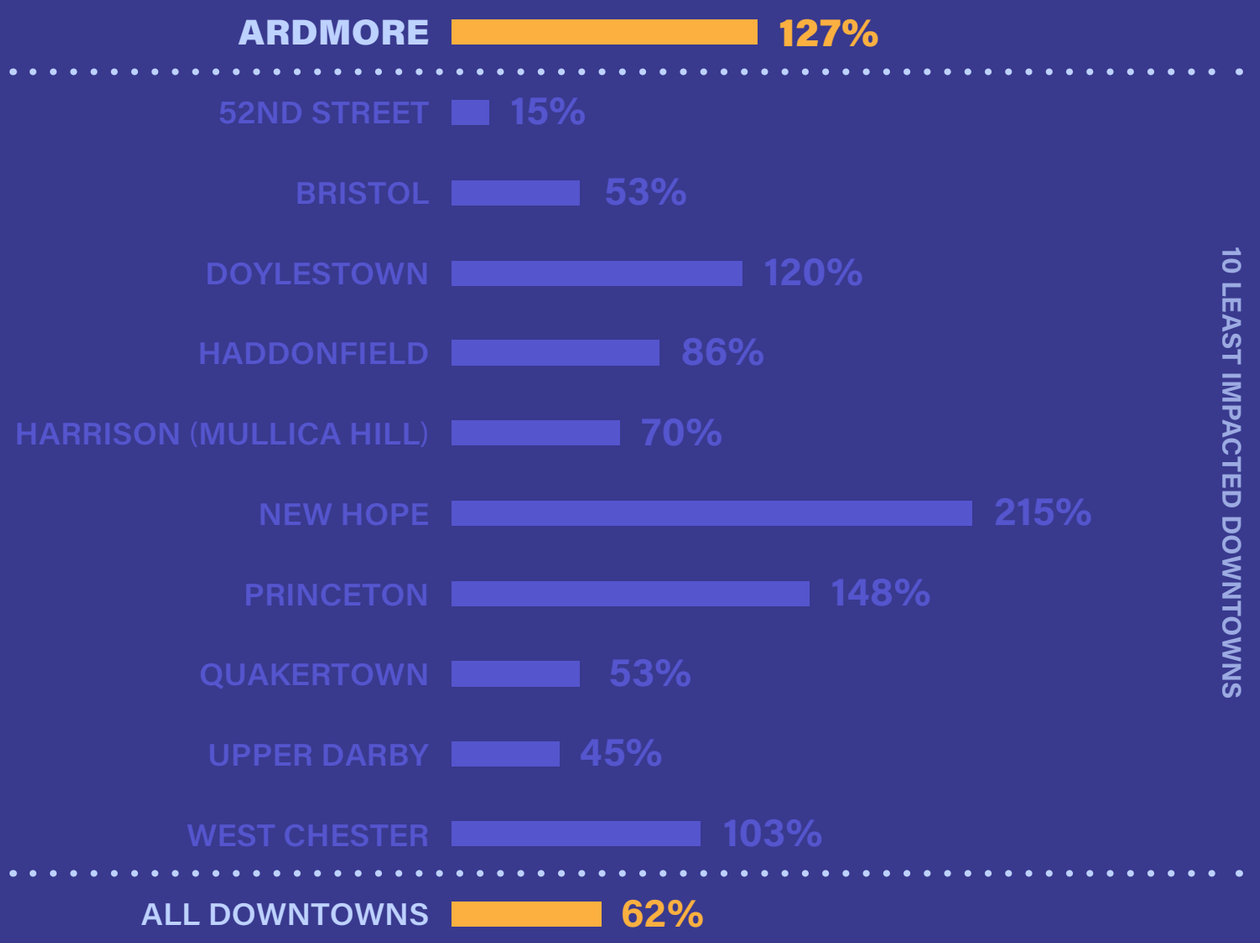
Reopening Rebound

June 16 - October 31, 2020

Visits to Ardmore increased by 127% during the reopening period to a total of 1,382 visits. This was 82% fewer than the 7,784 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.



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SOURCE: BUXTON CO.