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
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REGIONAL PLANNING COMMISSION

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 | Collingswood Borough, NJ

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.

Collingswood's downtown scores 29 with regards to diversity, which makes it one of the most diverse downtowns in the region. This is due to the downtown's walkable built environment, large residential population, retail mix, and its civic uses.

All of these were characteristics of the least impacted downtowns, which explains why Collingswood's Pandemic Impact Score of 45 is slightly less than the average impact for all downtowns.

29
Diversity Score
Built environment, mix of uses, population, transportation, and types of downtowns

45
Pandemic Impact Score
Visits and trade area pre-pandemic, and during the shut-down and reopening periods
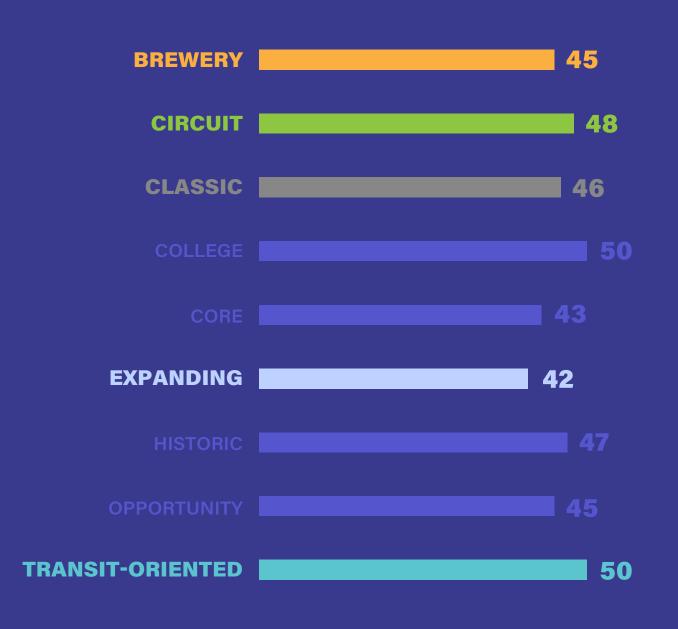
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Downtown Typologies

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. Collingswood is considered to be five typologies: *Brewery, Circuit* (although the trail is not existing)*, Classic, Expanding, and Transit-Oriented*.

Downtowns that are five typologies had an average Pandemic Impact Score of 42. Collingswood's score may be in part due to impacts on PATCO ridership, as well as the fact that *Circuit* downtowns that have not yet built their trails had an average score of 53 compared to 48 for those with existing trails.

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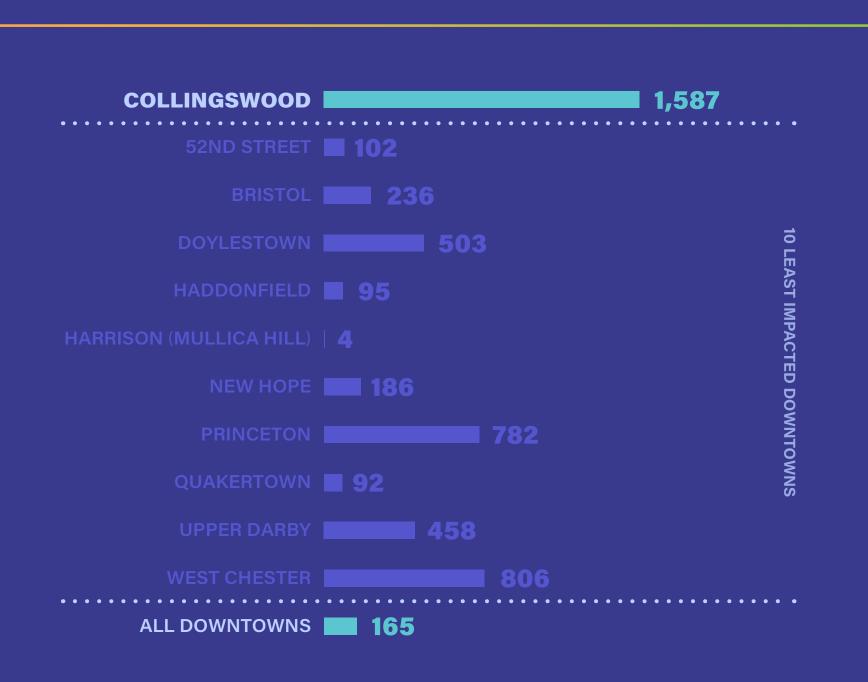| Typology	Score
BREWERY	45
CIRCUIT	48
CLASSIC	46
COLLEGE	50
CORE	43
EXPANDING	42
HISTORIC	47
OPPORTUNITY	45
TRANSIT-ORIENTED	50

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, Collingswood's downtown population was estimated to be 1,587, which was the largest population and most likely attributed to recent mixed-use developments within the downtown. The presence of a permanent residential population most likely mitigated some of the impacts related to PATCO ridership and helped reduce the impact observed in other *Transit-Oriented* downtowns.

The average population for the least impacted downtowns was 326 residents.

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SOURCE: BUXTON CO.

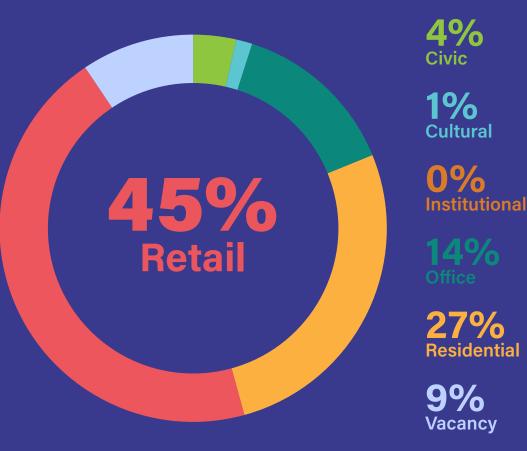|	
COLLINGSWOOD	1,587
52ND STREET	102
BRISTOL	236
DOYLESTOWN	503
HADDONFIELD	95
HARRISON (MULLICA HILL)	4
NEW HOPE	186
PRINCETON	782
QUAKERTOWN	92
UPPER DARBY	458
WEST CHESTER	806
ALL DOWNTOWNS	165

Mix of Uses

Retail Mix:

2%
Experiential (EXP)

39%
Food & Beverage (FB)

31%
General Merchandise,
Apparel, Furnishings,
& Other (GAFO)

28%
Neighborhood Goods
& Services (NGS)

45%
Retail

4%
Civic

1%
Cultural

0%
Institutional

14%
Office

27%
Residential

9%
Vacancy
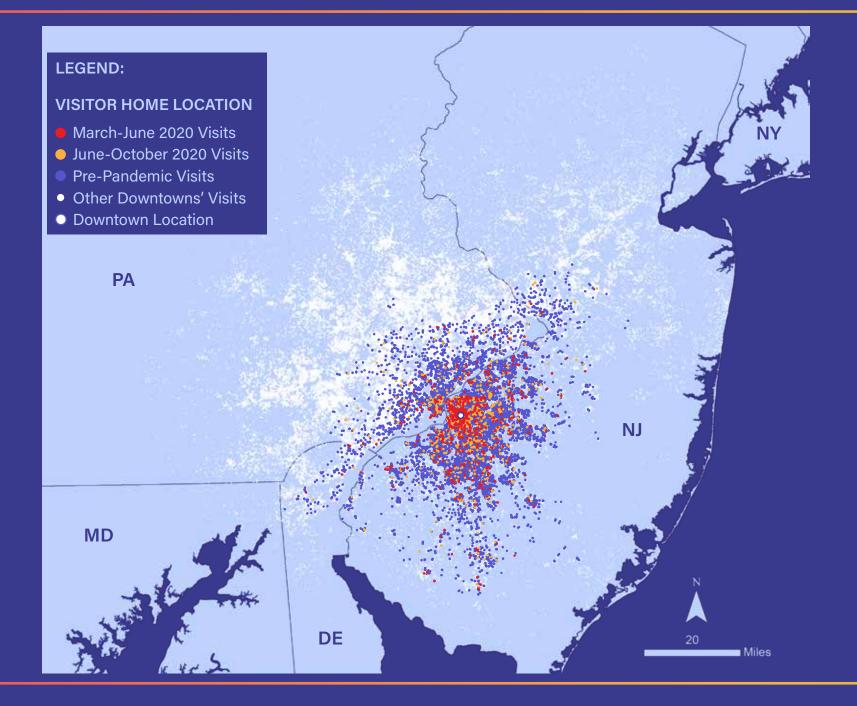
Retail accounts for 45% of the uses in Collingswood's downtown, which is one of the lowest shares observed in the region. The average was 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage* (FB) retailers made up a smaller share of retail on average at 30%. Conversely, *General Merchandise, Apparel, Furnishings & Other* (GAFO) and *Neighborhood Goods & Services* (NGS) retailers made up larger shares of retail on average at 38% and 30% respectively.

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

Of note, Collingswood was one of 15 downtowns to have at least one *Experiential* (EXP) retail use. This was a rising trend within the retail industry before the pandemic, and may continue to be post-pandemic as well.

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PA

NY

NJ

MD

DE

N

20 ——— Miles

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 Collingswood were as follows:

● **Pre-Pandemic**

Delaware: 0.7%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 13.8%
New Jersey: 85.5%	

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

Delaware: 0.4%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 8.7%
New Jersey: 90.9%	

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

Delaware: 0.3%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 10.6%
New Jersey: 89.1%	

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COLLINGSWOOD

BUCKS

MERCER

MONTGOMERY

CHESTER

PHILADELPHIA

DELAWARE

BURLINGTON

CAMDEN

GLOUCESTER

N

10 Miles

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SOURCE: BUXTON CO.

Visits to Downtown

Pre-pandemic, visitors to Collingswood came from Philadelphia and throughout southern New Jersey. During the pandemic, the majority of visits came from Camden and Gloucester Counties, and somewhat from Center City Philadelphia.

Between August 2018 and March 2020, 19,537 people visited the downtown. This was nearly twice the average of 8,800 for all of the downtowns.

During the shutdown (March 13 - June 15) there were 755 visits, and during the reopening period (June 16 - October 31) there were 1,222 visits to Collingswood.
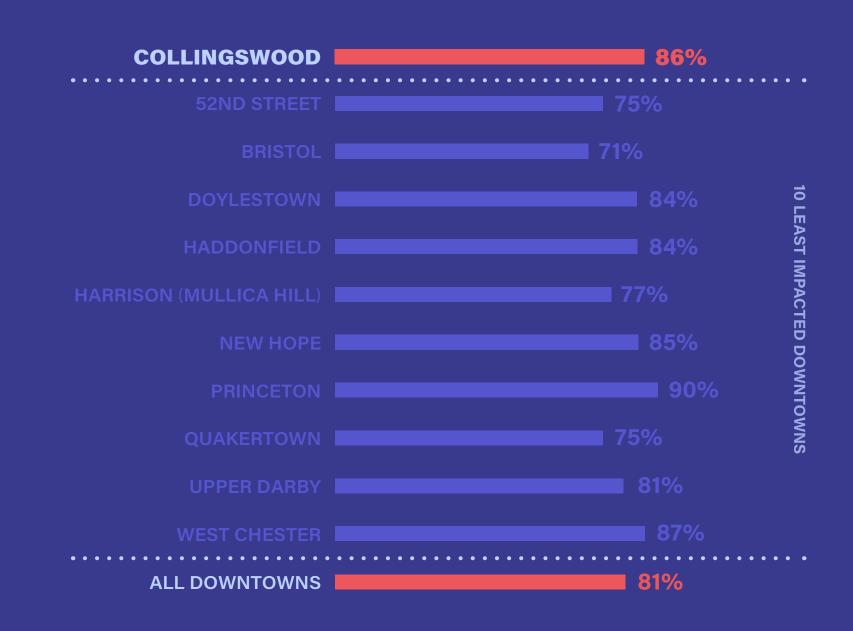
Shutdown Impact
March 13 - June 15, 2020

During the economic shutdown, there were 755 visits to Collingswood compared to 5,379 visits during the same period in 2019. This equated to an 86% 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.

Downtown	Reduction
COLLINGSWOOD	**86%**
52ND STREET	75%
BRISTOL	71%
DOYLESTOWN	84%
HADDONFIELD	84%
HARRISON (MULLICA HILL)	77%
NEW HOPE	85%
PRINCETON	90%
QUAKERTOWN	75%
UPPER DARBY	81%
WEST CHESTER	87%
ALL DOWNTOWNS	**81%**

10 LEAST IMPACTED DOWNTOWNS

Reopening Rebound

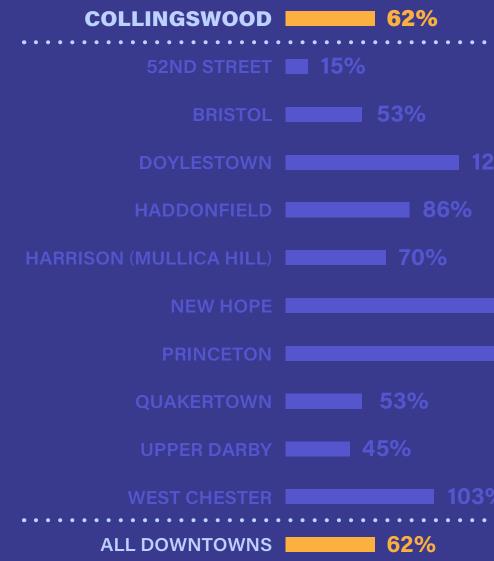## June 16 - October 31, 2020

Visits to Collingswood's downtown increased by 62% during the reopening period, which was the average for all downtowns, to a total of 1,222 visits. This was 81% fewer than the 6,314 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.

COLLINGSWOOD	**62%**
52ND STREET	15%
BRISTOL	53%
DOYLESTOWN	120%
HADDONFIELD	86%
HARRISON (MULLICA HILL)	70%
NEW HOPE	215%
PRINCETON	148%
QUAKERTOWN	53%
UPPER DARBY	45%
WEST CHESTER	103%
ALL DOWNTOWNS	**62%**

10 LEAST IMPACTED DOWNTOWNS
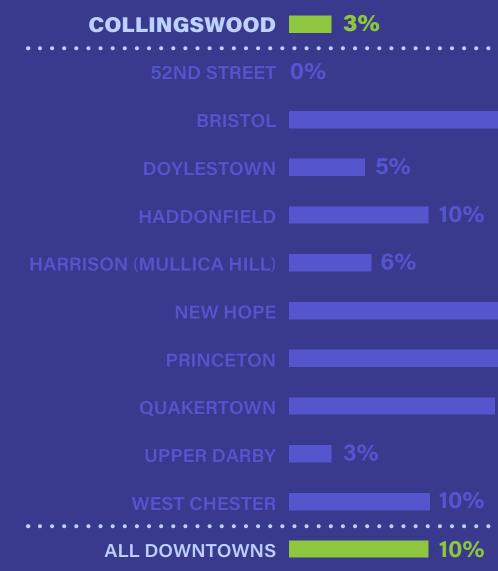
Trade Area Recovery
(Drive Time in Minutes)

Collingswood's pre-pandemic trade area was a 33 minute drive time, which shrank by 15% during the shutdown to 28 minutes. During reopening, the trade area recovered by 3% to 29 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% up to 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.

⊘dvrpc

SOURCE: BUXTON CO.

COLLINGSWOOD	**3%**
52ND STREET	0%
BRISTOL	15%
DOYLESTOWN	5%
HADDONFIELD	10%
HARRISON (MULLICA HILL)	6%
NEW HOPE	14%
PRINCETON	20%
QUAKERTOWN	14%
UPPER DARBY	3%
WEST CHESTER	10%
ALL DOWNTOWNS	**10%**