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

Column 1

- 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

Column 2

- 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

Column 3

- 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 | Radnor Township (Wayne), 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.

Wayne's walkable downtown has a number of civic, cultural, and office uses. It also has a healthy mix of chain and local ratailers. However, it has one of the highest shares of retail uses in the region, and its small residential population lacks diversity. Therefore, the downtown received an average Diversity Score of 49.

These characteristics, as well as the pandemic's impact on SEPTA ridership and the student population at nearby Cabrini University, are also reflected in the downtown receiving an average Pandemic Impact Score of 50.

49
Diversity Score
Built environment, mix of uses, population, transportation, and types of downtowns

50
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. Wayne is considered to be five typologies: *Classic, College, Expanding* (due to potential for expansion), *Historic,* and *Transit-Oriented.* There were 12 downtowns in total that were considered to be five typologies with an average Pandemic Impact Score of 42.

College and *Transit-Oriented* were the most impacted. Wayne has the potential to expand by facilitating redevelopment near the train station, and the average score for potentially *Expanding* downtowns was 46.
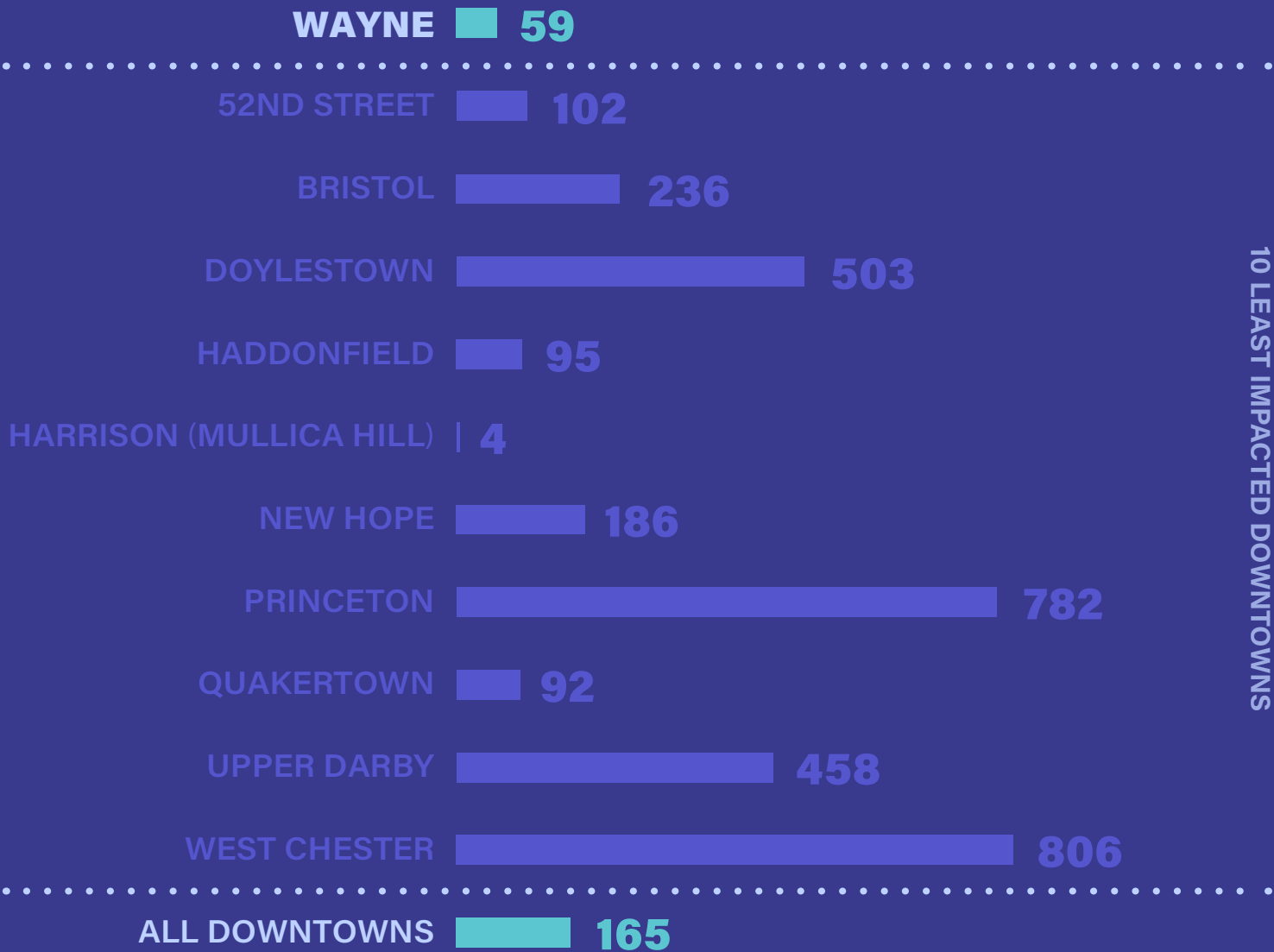
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Typology	Score
BREWERY	45
CIRCUIT	48
CLASSIC	46
COLLEGE	50
CORE	43
EXPANDING	42
HISTORIC	47
OPPORTUNITY	45
TRANSIT-ORIENTED	50
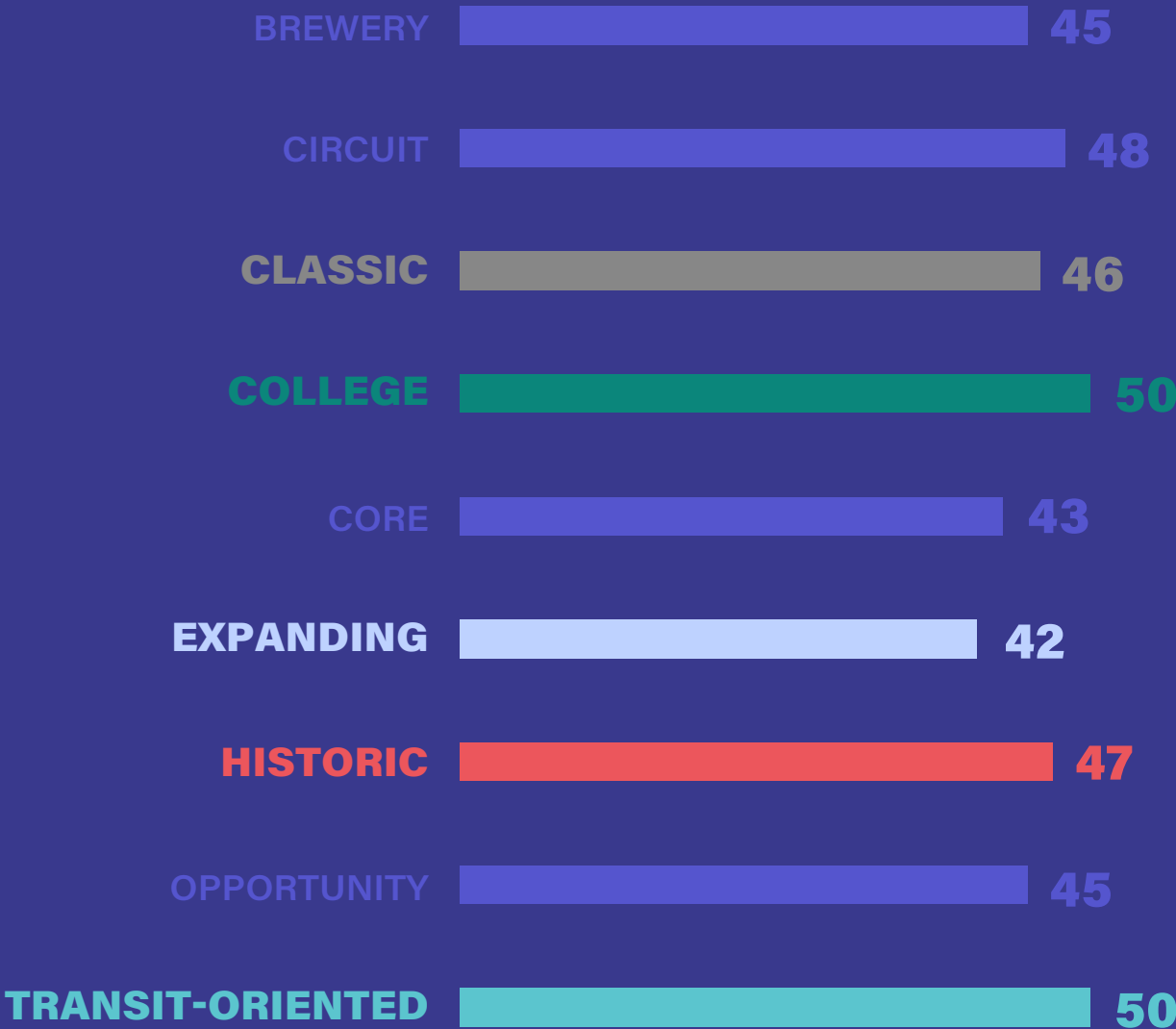
Downtown Population

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, Wayne's downtown population was estimated to be 59, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.

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SOURCE: BUXTON CO.

WAYNE	59
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:

34%
Food & Beverage (FB)

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

31%
Neighborhood Goods
& Services (NGS)

79%
Retail

3%
Civic

2%
Cultural

0%
Institutional

12%
Office

2%
Residential

2%
Vacancy

Retail accounts for 79% of the uses in Wayne, 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) made up a slightly smaller share of retail at 30%, while *General Merchandise, Apparel, Furnishings & Other* (GAFO) was slightly higher in the least impacted downtowns at 38% of all retail. In general, as the shares of these retailers increased, the average Pandemic Impact Score decreased.
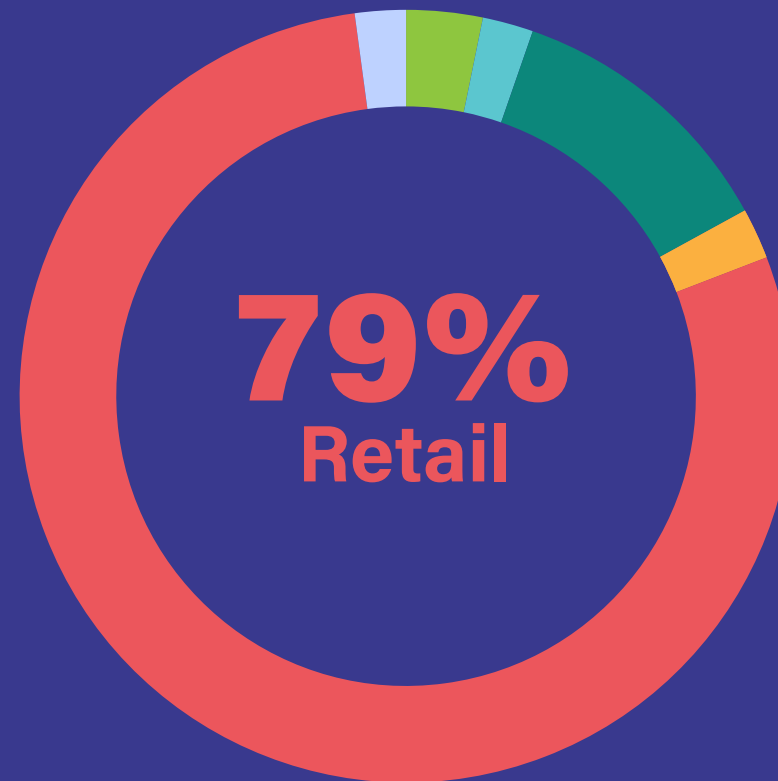
Conversely, in the least impacted downtowns, *Neighborhood Goods & Services* (NGS) retailers made up 30% of all retail, which is nearly equal to that of Wayne. As the share of NGS retail increased, the higher the Pandemic Impact Score.

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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 Wayne were as follows:

- **Pre-Pandemic**

  Delaware: 1.3%   New York: 0.0%
  Maryland: 0.0%   Pennsylvania: 96.9%
  New Jersey: 1.8%

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

  Delaware: 0.3%   New York: 0.0%
  Maryland: 0.0%   Pennsylvania: 98.3%
  New Jersey: 1.4%

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

  Delaware: 1.4%   New York: 0.0%
  Maryland: 0.0%   Pennsylvania: 97.6%
  New Jersey: 1.0%
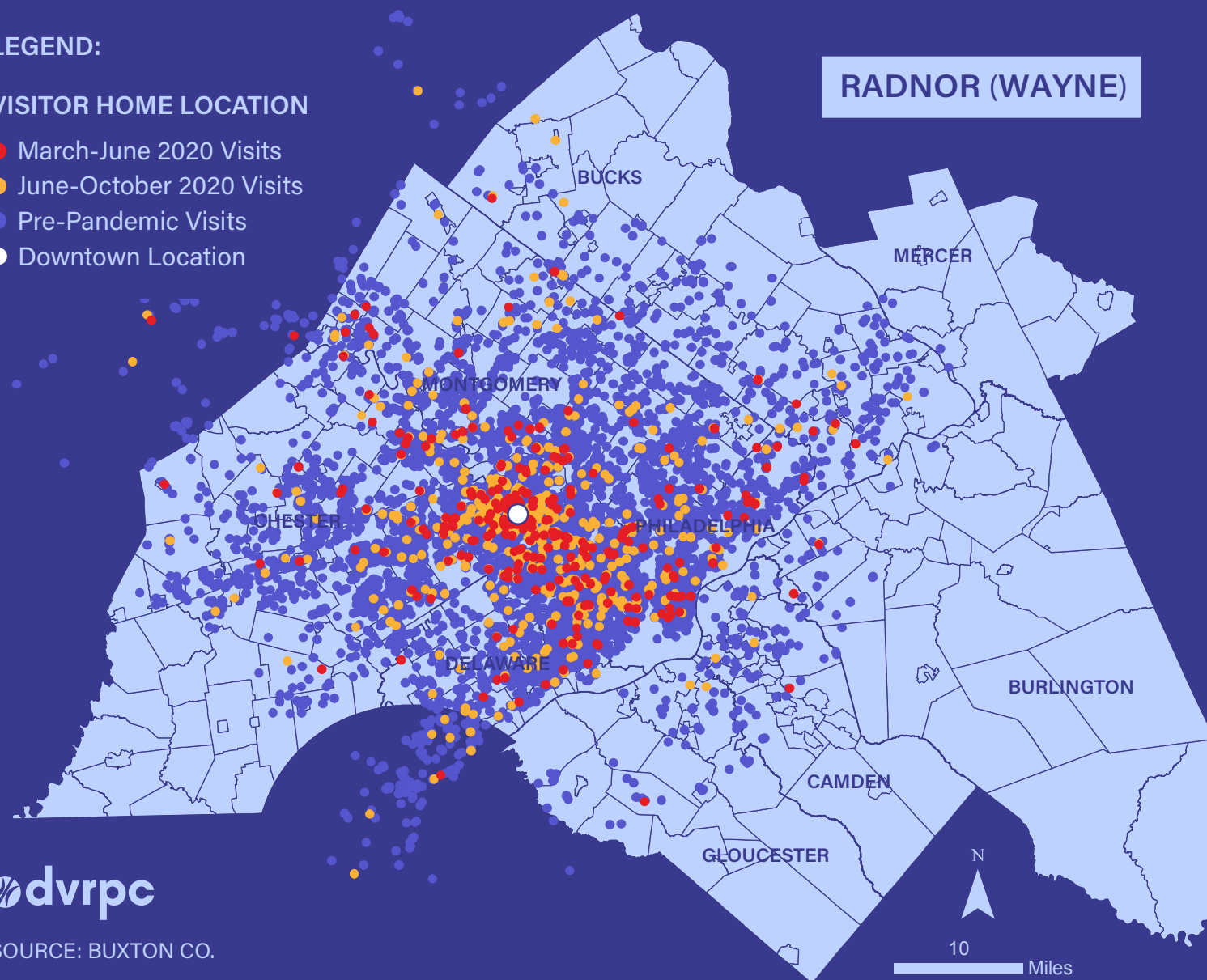
dvrpc

SOURCE: BUXTON CO.

LEGEND:

VISITOR HOME LOCATION

- 🔴 March-June 2020 Visits
- 🟠 June-October 2020 Visits
- 🔵 Pre-Pandemic Visits
- ⚪ Other Downtowns' Visits
- ⚪ Downtown Location

PA

NY

NJ

MD

DE

N

20 Miles

LEGEND:

VISITOR HOME LOCATION

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

RADNOR (WAYNE)

BUCKS

MERCER

MONTGOMERY

CHESTER

PHILADELPHIA

DELAWARE

BURLINGTON

CAMDEN

GLOUCESTER

N

10
Miles

Visits to Downtown

Pre-pandemic, visitors to Wayne primarily came from throughout Bucks, Chester, Delaware, Montgomery and Philadelphia Counties. During the pandemic, most visitors came from Chester and Delaware Counties.

Between August 2018 and March 2020, 12,432 people visited the downtown, which is 41% higher than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 335 visits, and during the reopening period (June 16 - October 31) there were 712 visits to Wayne.
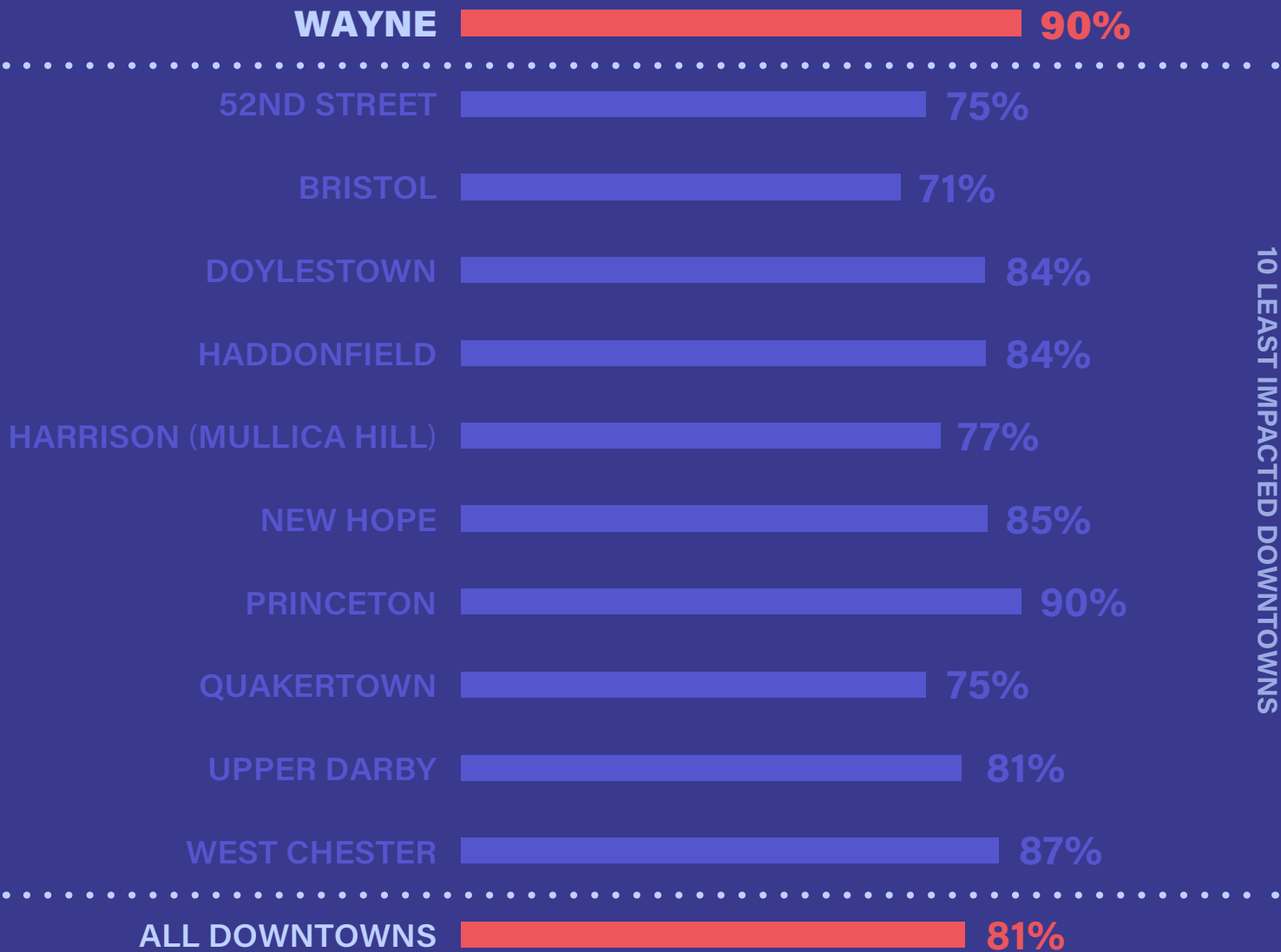
Shutdown Impact
March 13 - June 15, 2020

During the economic shutdown, there were 335 visits to Wayne compared to 3,524 visits during the same period in 2019. This equated to a 90% reduction, which was one of the highest reductions observed.

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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10 LEAST IMPACTED DOWNTOWNS

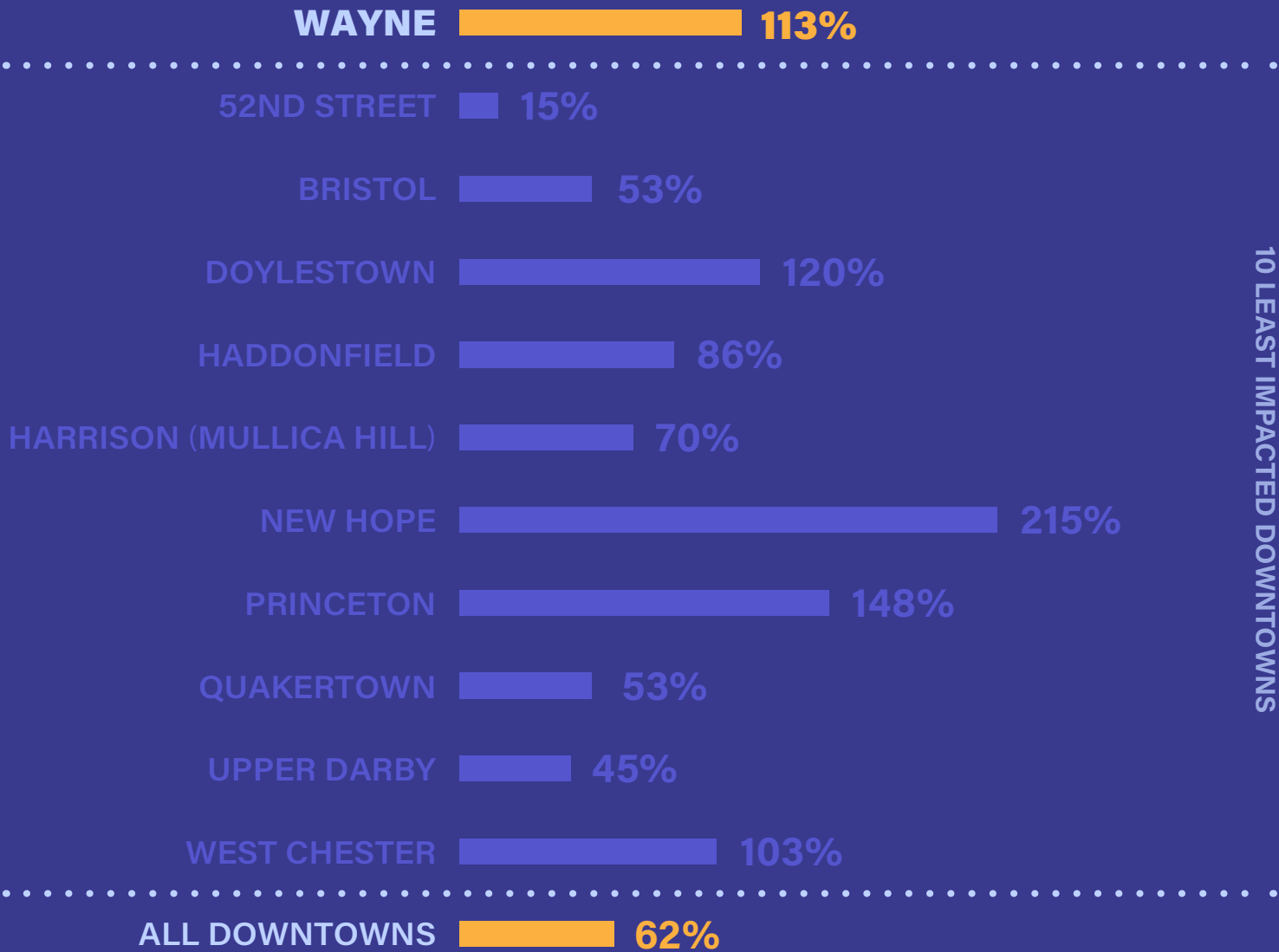| Downtown	Reduction
WAYNE	90%
52ND STREET	75%
BRISTOL	71%
DOYLESTOWN	84%
HADDONFIELD	84%
HARRISON (MULLICA HILL)	77%
NEW HOPE	85%
PRINCETON	90%
QUAKERTOWN	75%
UPPER DARBY	81%
WEST CHESTER	87%
ALL DOWNTOWNS	81%

Reopening Rebound
June 16 - October 31, 2020

Visits to Wayne increased by 113% during the reopening period to a total of 712 visits. This was 82% fewer than the 4,053 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.

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SOURCE: BUXTON CO.

WAYNE **113%**

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)

Wayne's pre-pandemic trade area was a 37 minute drive time, which only shrank by 5% during the shutdown to 35 minutes. However, during reopening, the trade area shrank by an additional 8% to 32 minutes. Wayne was one of the only downtowns to see a further trade area reduction during reopening.

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).

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WAYNE	**-8%**
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%**

10 LEAST IMPACTED DOWNTOWNS