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.

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
Merchandise 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 (Glenridge) | 55
Yardley Borough | 49
Souderton Borough | 73
Haverford Township (Oakmont) | 59
Morrisville Borough | 60
Telford Borough | 59
Westville Borough | 64
Wenonah Borough | 88
Barrington Borough | 74
Haverford Township (Brookline) | 66
East Lansdowne Borough | 60
Laurel Springs Borough | 81

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.
Characteristics that **reduced** the pandemic’s impact:

Downtowns with the following characteristics were generally less impacted by the pandemic than their peers.

<table>
<thead>
<tr>
<th>Development</th>
<th>Diversity</th>
<th>People</th>
<th>Trails</th>
<th>Walkability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent mixed-use, residential, and retail developments within the downtowns increased diversity as well as resiliency.</td>
<td>Downtowns with diverse built environments, demographics, local economies, mix of uses, and transportation options, were less impacted.</td>
<td>Diverse and permanent residential populations located within the downtowns provided retailers with customers even as people stayed close to home.</td>
<td>Existing Circuit Trails connected downtowns with open space and enabled alternative modes of transportation.</td>
<td>Historic downtowns with more pedestrian-friendly built environments had greater resiliency.</td>
</tr>
</tbody>
</table>
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 | Langhorne 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.

Langhorne’s downtown has a historic built environment, significant residential population, and a number of office uses. However, it’s not as walkable, lacks the cultural uses, and has a high share of Neighborhood Goods & Services (NGS) retailers compared to other downtowns. These characteristics are reflected in its Diversity Score of 58, which indicates that the downtown is slightly less diverse than the average downtown.

Similarly, the pandemic had a slightly higher than average impact in Langhorne, and the downtown earned a Pandemic Impact Score of 52. These findings suggest that efforts to improve diversity may help fortify what is already a relatively resilient downtown.
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. Langhorne is considered to be one typology: Historic.

Downtowns that are considered to be one typology had an average Pandemic Impact Score of 61.
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, Langhorne's downtown population was estimated to be 100, which was less than the averages of 165 for all downtowns and 326 for the least impacted downtowns.
Retail accounts for 42% of the uses in Langhorne’s downtown, which is one of the lowest shares observed. It is also less than the averages of 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, Food & Beverage (FB) retailers made up a slightly larger share at 30%, while General Merchandise, Apparel, Furnishings & Other (GAFO) retailers made up a much larger share at 38%. In general, as the share of each of these increased, the Pandemic Impact Score decreased.

Conversely, Neighborhood Goods & Services (NGS) retailers made up a significantly smaller share in the least impacted downtowns at 30%. On average, as the share of NGS retailers or a downtown’s vacancy rate increased, so did the Pandemic Impact Score. Langhorne has a vacancy rate of 1%, compared to the average of 7.8% for the least impacted downtowns.
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 Langhorne were as follows:

- **Pre-Pandemic**
  - Delaware: 0.0%
  - Maryland: 0.0%
  - New Jersey: 5.9%
  - New York: 0.0%
  - Pennsylvania: 94.1%

- **Shutdown | March 13 - June 15, 2020**
  - Delaware: 0.0%
  - Maryland: 0.0%
  - New Jersey: 5.4%
  - New York: 0.0%
  - Pennsylvania: 94.6%

- **Reopening | June 16 - October 31, 2020**
  - Delaware: 0.0%
  - Maryland: 0.0%
  - New Jersey: 4.6%
  - New York: 0.0%
  - Pennsylvania: 95.4%
Pre-pandemic, visitors to Langhorne were primarily from lower Bucks, Montgomery, and Philadelphia Counties. During the pandemic, most visitors came from lower Bucks County.

Between August 2018 and March 2020, 7,923 people visited the downtown. This was less than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 452 visits, and during the reopening period (June 16 - October 31) there were 689 visits to Langhorne’s downtown.
During the economic shutdown, there were 452 visits to Langhorne’s downtown compared to 2,373 visits during the same period in 2019. This equated to an 81% 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.
Visits to Langhorne’s downtown increased by 52% during the reopening period to a total of 689 visits. This was 77% fewer than the 3,010 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.
Trade Area Recovery
(Drive Time in Minutes)

Langhorne’s pre-pandemic trade area was a 26 minute drive time, which shrank by 19% during the shutdown to 21 minutes. During reopening, the trade area recovered by 4% to 22 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% 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. It was also the only downtown to have a larger trade area during reopening (72 minutes) than it did pre-pandemic.

SOURCE: BUXTON CO.