

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 | Lower Merion Township (Haverford), 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.

Lower Merion (Haverford) is a somewhat walkable and historic downtown. However, it lacks the residential population, as well as the mix of uses and retail types that other downtowns have. These qualities are why Haverford received a Diversity Score of 63, which makes it one of the least diverse downtowns in the region.

The downtown's lack of diversity most likely exacerbated the pandemic's impact, which is reflected in its Pandemic Impact Score of 75. This is the second highest impact observed.

63

Diversity Score

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

75

Pandemic Impact Score

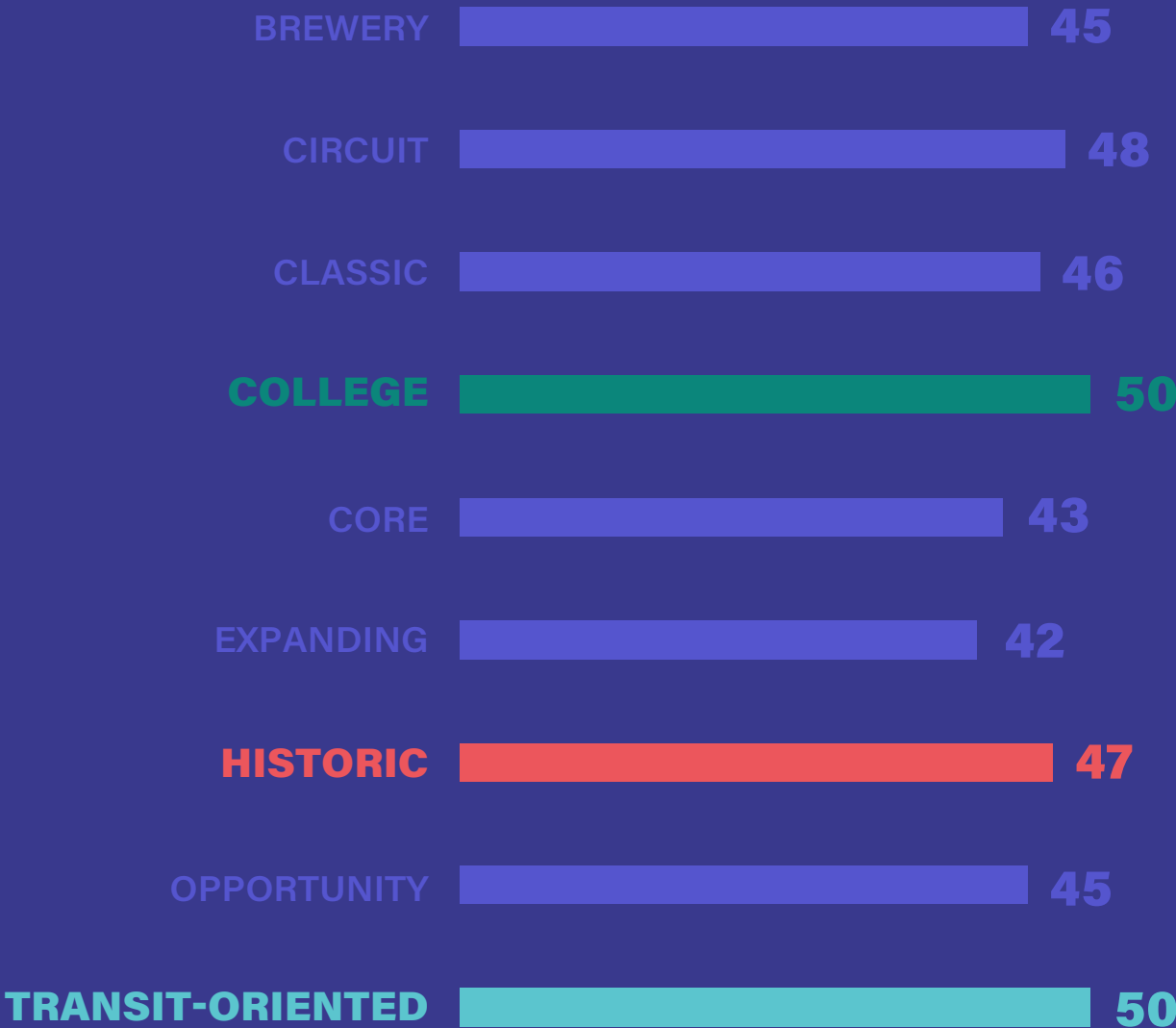
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

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. Haverford is considered to be three typologies: *College*, *Historic*, and *Transit-Oriented*. Downtowns that are considered to be three typologies had an average Pandemic Impact Score of 53.

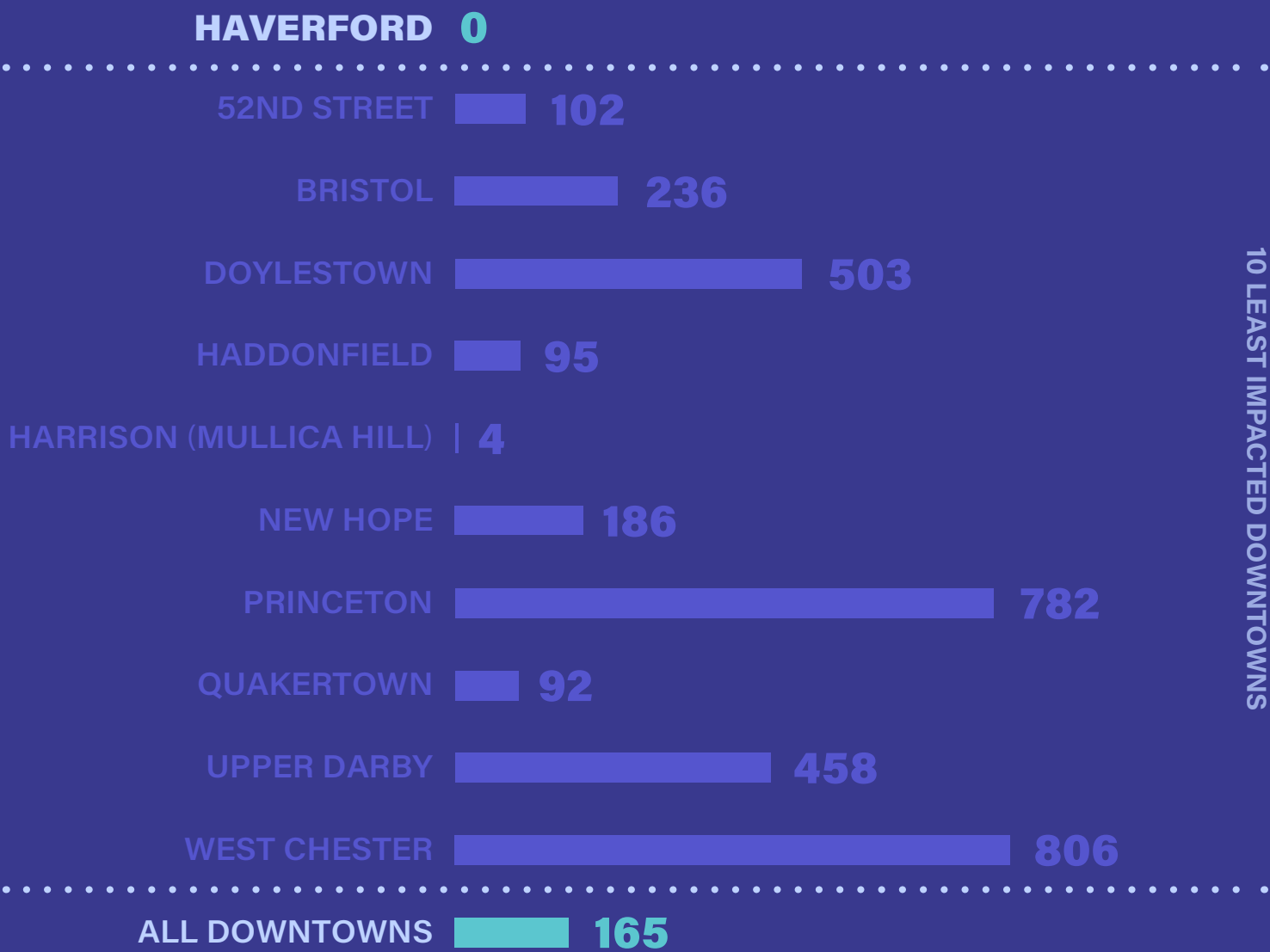
It is worth highlighting that *College* and *Transit-Oriented* downtowns were the most impacted types. Both types received an average Pandemic Impact Score of 50.



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, the population in Lower Merion (Haverford) was estimated to be 0, compared to the average of 165 for all downtowns and 326 for the least impacted downtowns.



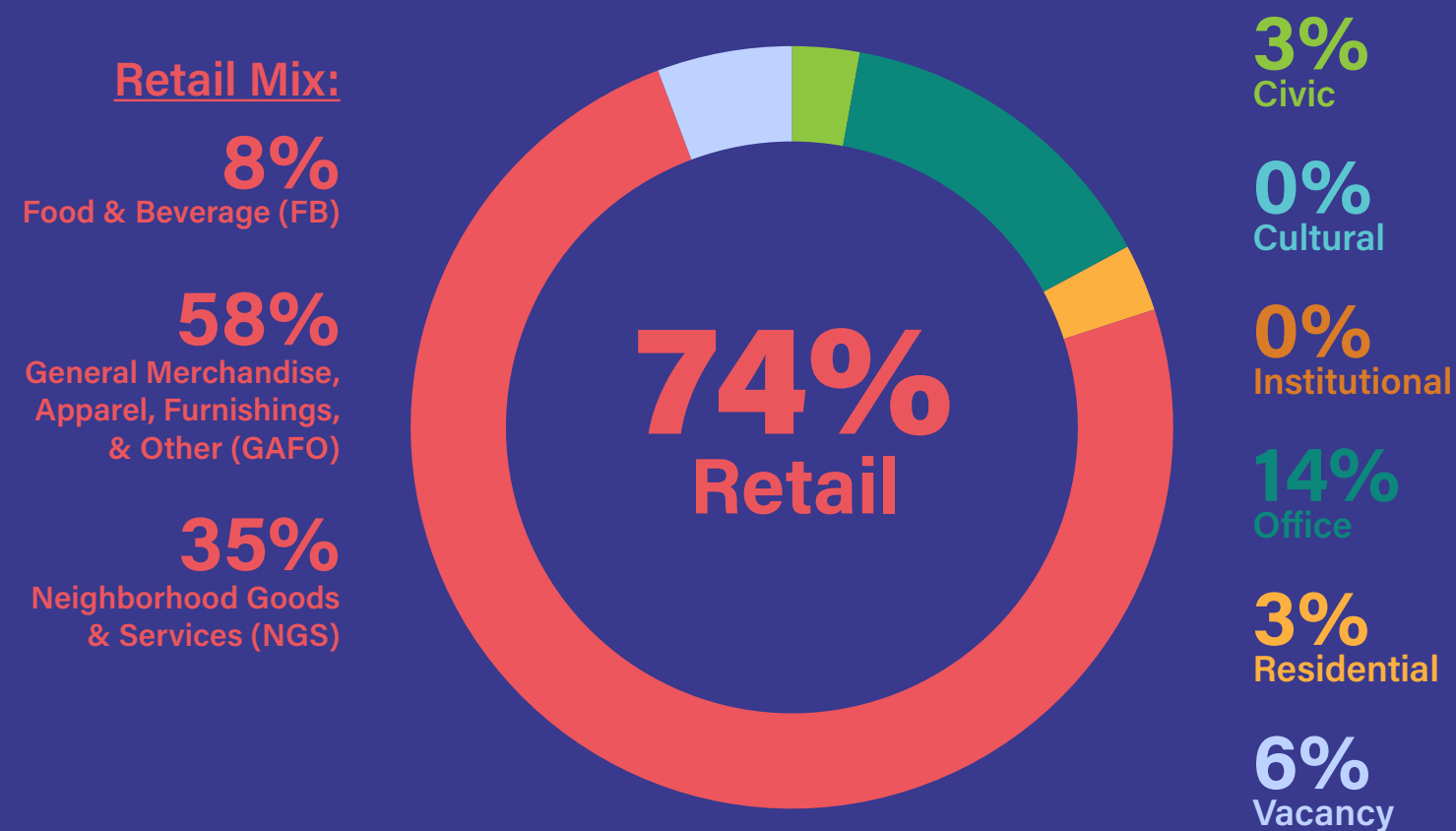
Mix of Uses

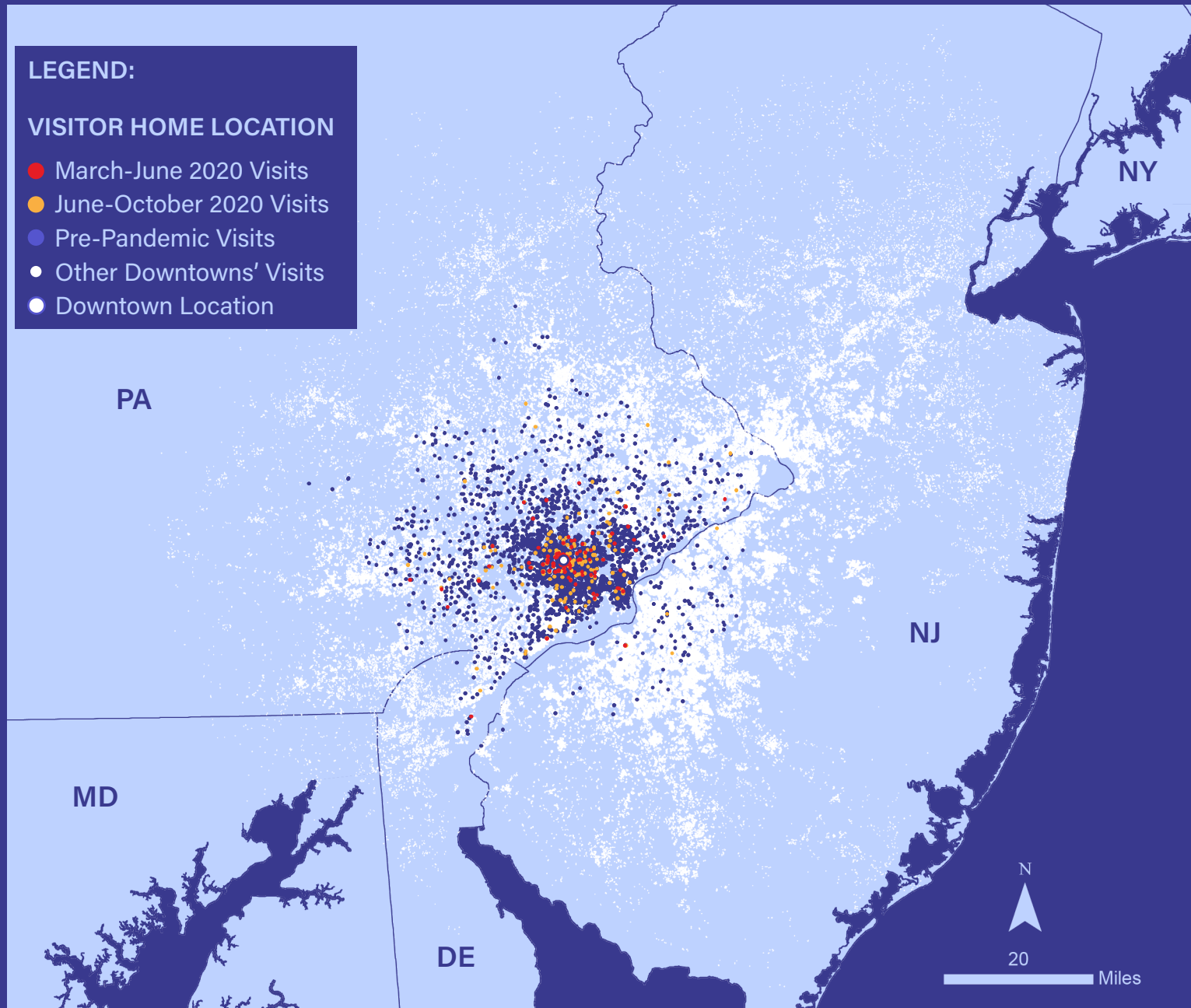
Retail accounts for 74% of the uses in Haverford, which is higher than both the average of 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage* (FB) retailers account for a much larger share at 30%, and *General Merchandise, Apparel, Furnishings & Other* (GAFO) retailers account for a much smaller share at 38%. On average, as the share of each of these increased the Pandemic Impact Score decreased.

Conversely, in the least impacted downtowns, *Neighborhood Goods & Services* (NGS) retailers made up a slightly smaller share on average at 30%. 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.





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 Lower Merion (Haverford) were as follows:

● Pre-Pandemic

Delaware: 0.7%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 97.1%
New Jersey: 2.2%	

● Shutdown | March 13 - June 15, 2020

Delaware: 1.0%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 97.9%
New Jersey: 1.0%	

● Reopening | June 16 - October 31, 2020

Delaware: 1.1%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 96.8%
New Jersey: 2.1%	

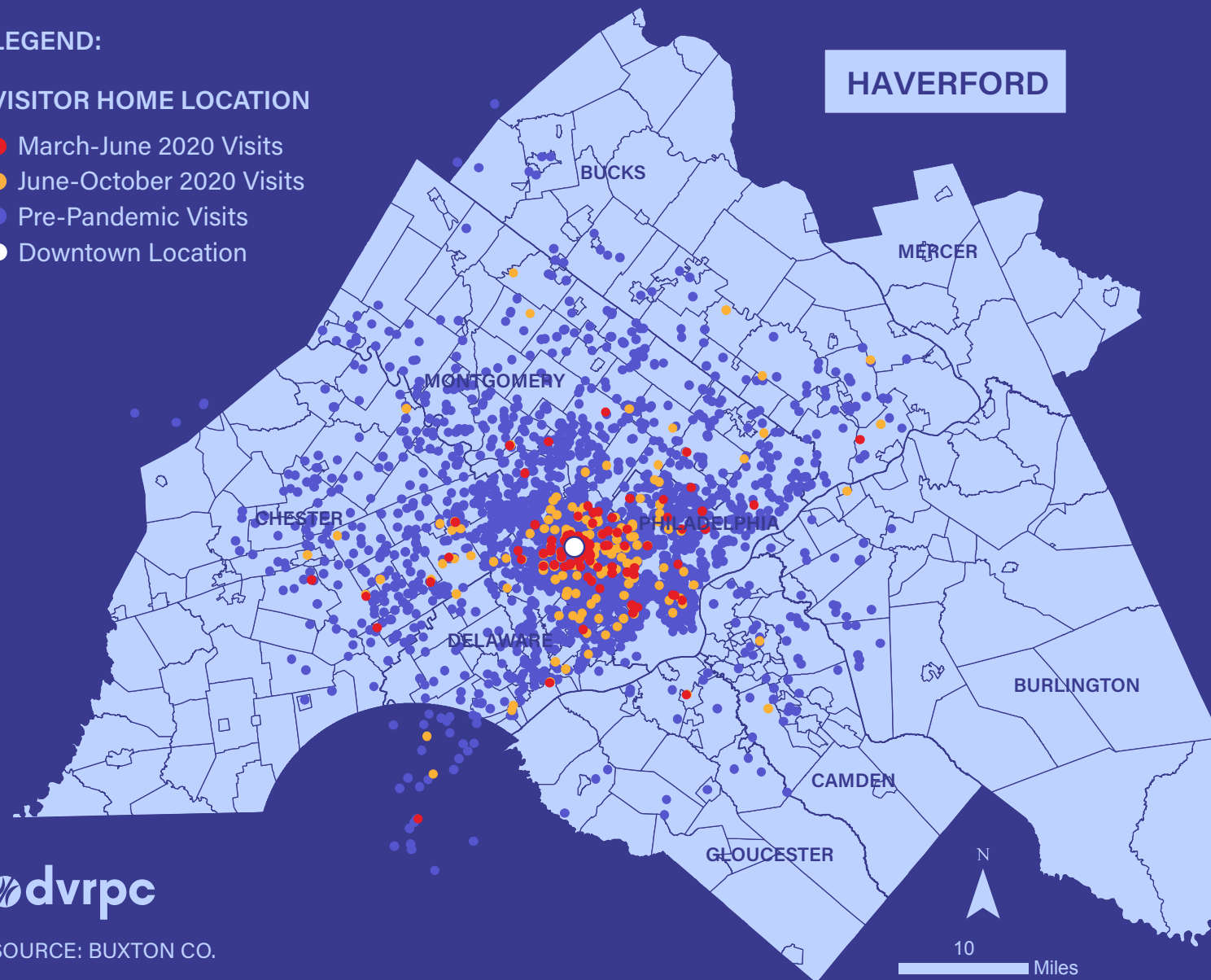


SOURCE: BUXTON CO.

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 Lower Merion (Haverford) primarily came from Chester, Delaware, Montgomery, and Philadelphia Counties. However, during the pandemic, the majority of visits were from within Delaware and Montgomery Counties.

Between August 2018 and March 2020, 4,723 people visited the downtown, which was approximately half of the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 108 visits, and during the reopening period (June 16 - October 31) there were 222 visits to Haverford.

Shutdown Impact

March 13 - June 15, 2020

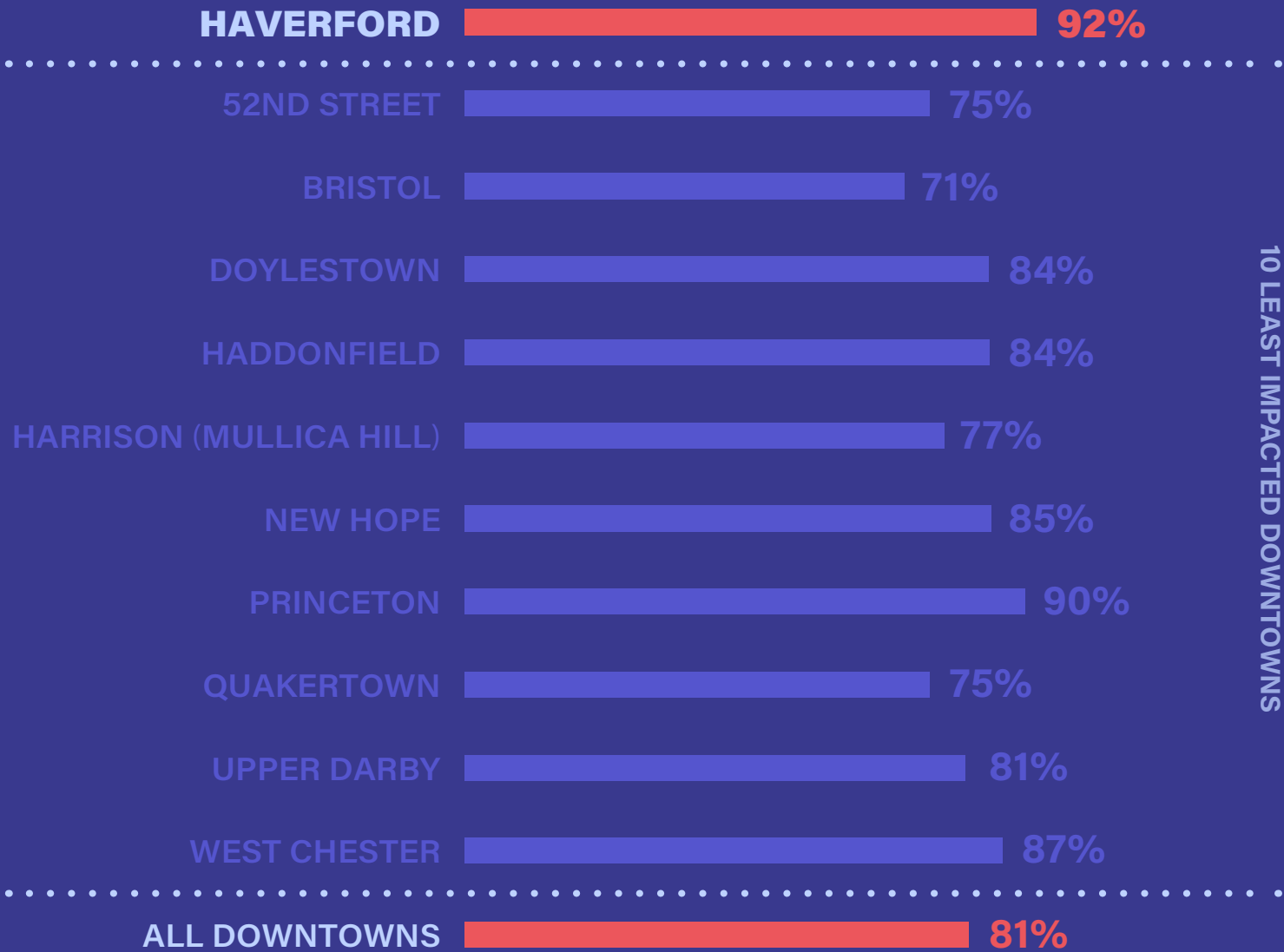
During the economic shutdown, there were 108 visits to Lower Merion (Haverford) compared to 1,324 visits during the same period in 2019. This equated to a 92% reduction, which was the second highest reduction observed.

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%.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Reopening Rebound

June 16 - October 31, 2020

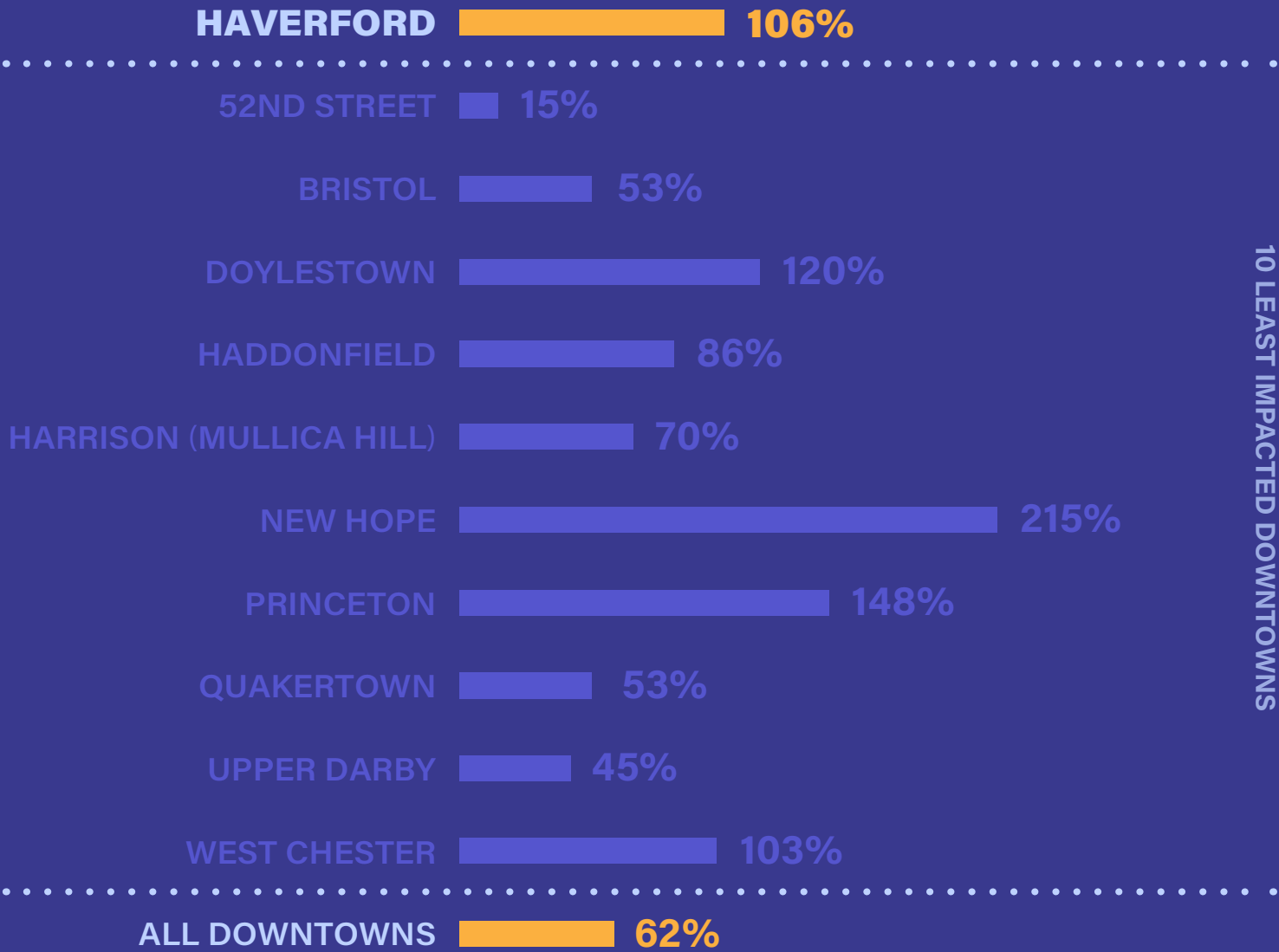
Visits to Lower Merion (Haverford) increased by 106% during the reopening period to a total of 222 visits. This was 86% fewer than the 1,631 visits that occurred during the same period in 2019.

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.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Trade Area Recovery

(Drive Time in Minutes)

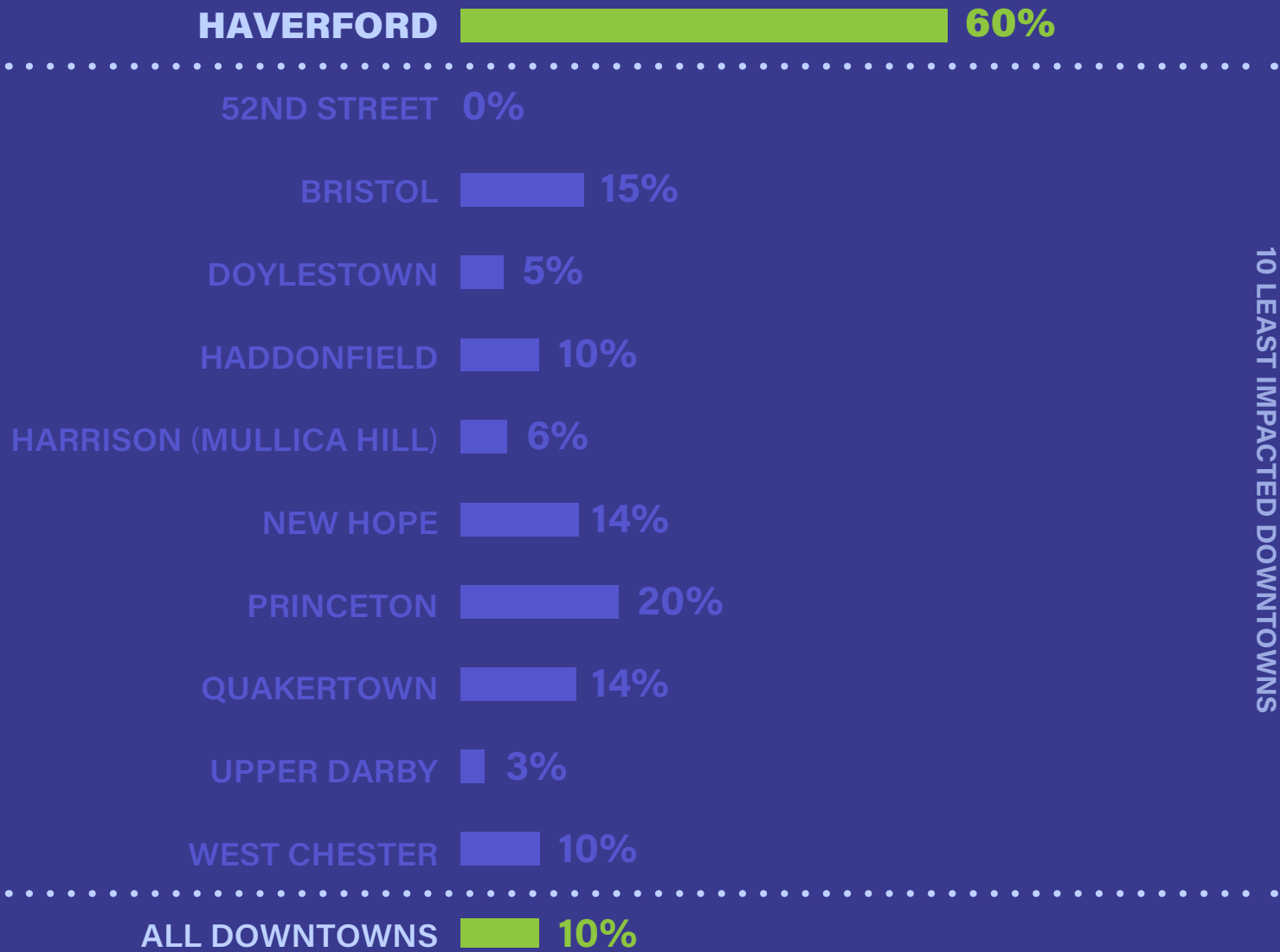
Haverford’s pre-pandemic trade area was a 35 minute drive time, which shrank by 71% during the shutdown to less than 10 minutes. This was the second greatest impact observed. During reopening, the trade area recovered by 60% to 31 minutes.

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-



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS