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.

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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 | Souderton 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.

Despite the walkability of Souderton's downtown and its healthy retail mix, it lacks a residential population, as well as the number of civic, cultural, and office uses that other downtowns have. As a result, the downtown was determined to be one of the least diverse in the region and received a Diversity Score of 65.

These characteristics, in addition to the downtown's high vacancy rate, most likely exacerbated the pandemic's impact, which resulted in Souderton receiving a Pandemic Impact Score of 73. This was the fifth highest impact observed.

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. Souderton is considered to be three typologies: *Circuit* (although the trail is not existing), *Classic,* and *Historic*. Downtowns that are considered to be three typologies had an average Pandemic Impact Score of 53.

Souderton's higher impact score may be in part due to 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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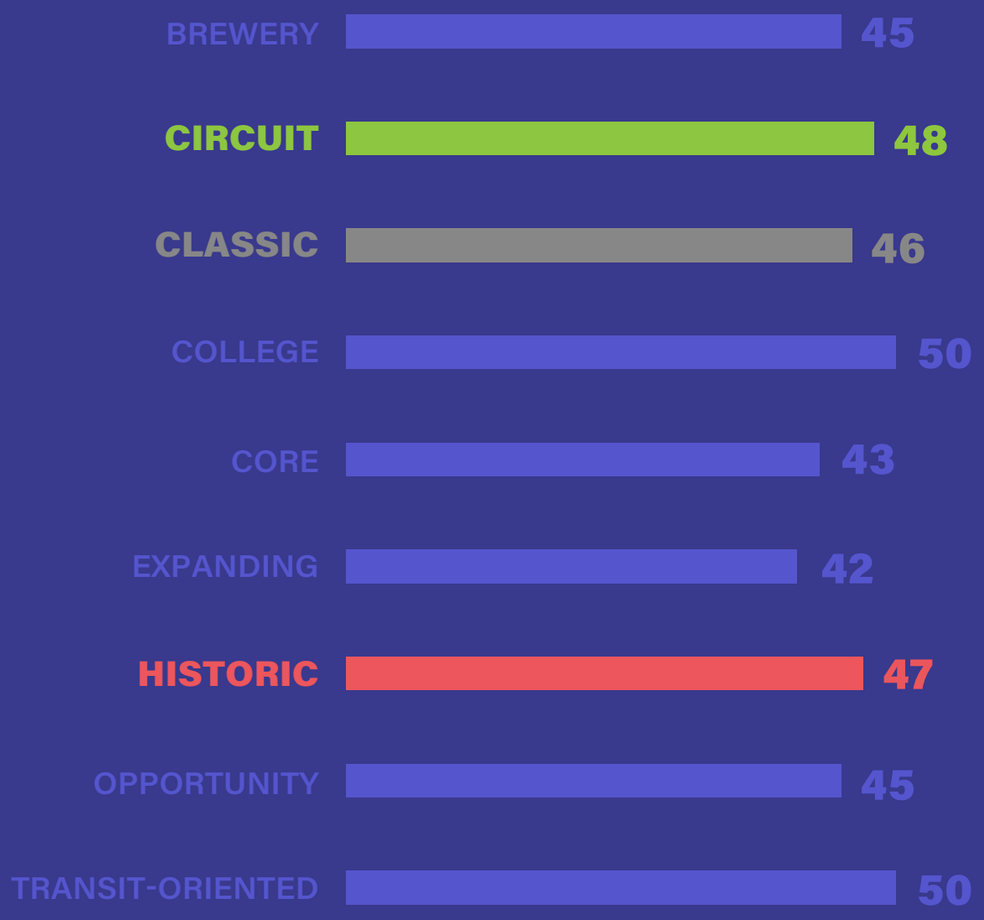
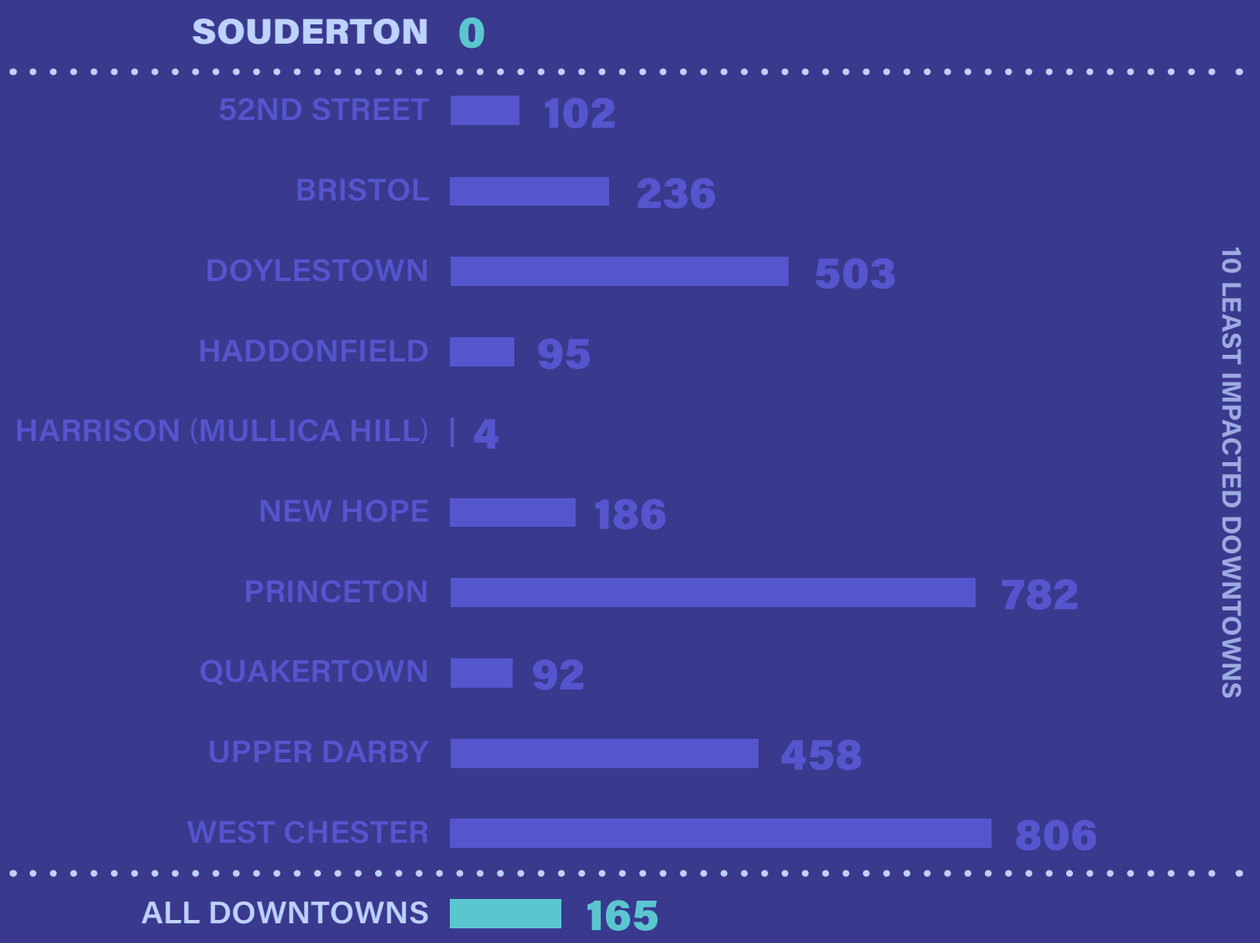


Downtown Population

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, Souderton's downtown population was estimated to be 0, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.



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SOURCE: BUXTON CO.

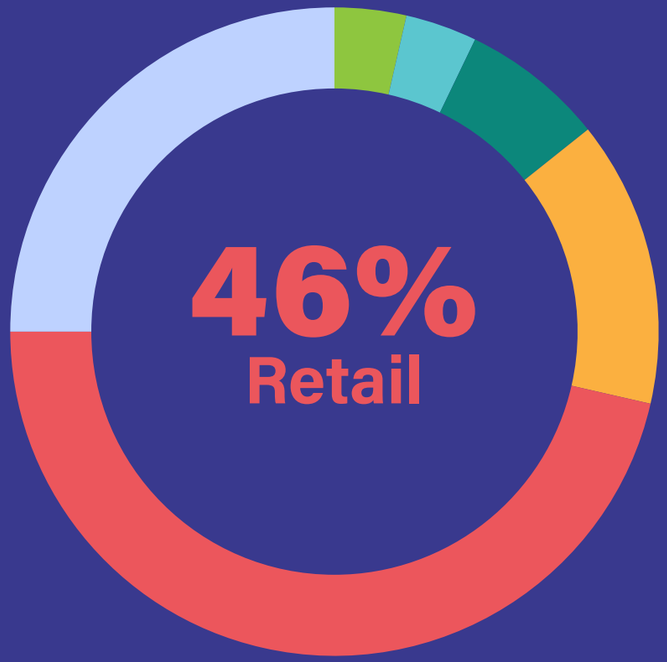
Mix of Uses

Retail Mix:

31%
Food & Beverage (FB)

38%
General Merchandise, Apparel, Furnishings, & Other (GAFO)

31%
Neighborhood Goods & Services (NGS)



4%
Civic

4%
Cultural

0%
Institutional

7%
Office

14%
Residential

25%
Vacancy

Retail accounts for 46% of the uses in Souderton's downtown, which is one of the lowest shares observed. The average was 57% for all downtowns and 60% for the least impacted downtowns.

Souderton's retail mix is almost identical to that of the least impacted downtowns, where *Food & Beverage* (FB) was 30%, *General Merchandise, Apparel, Furnishings & Other* (GAFO) was also 38%, and *Neighborhood Goods & Services* (NGS) retailers made up 30%.

In general, the greater the share of NGS retail or the higher the vacancy rate, the higher the Pandemic Impact Score, and Souderton has one of the highest vacancy rates in the region.

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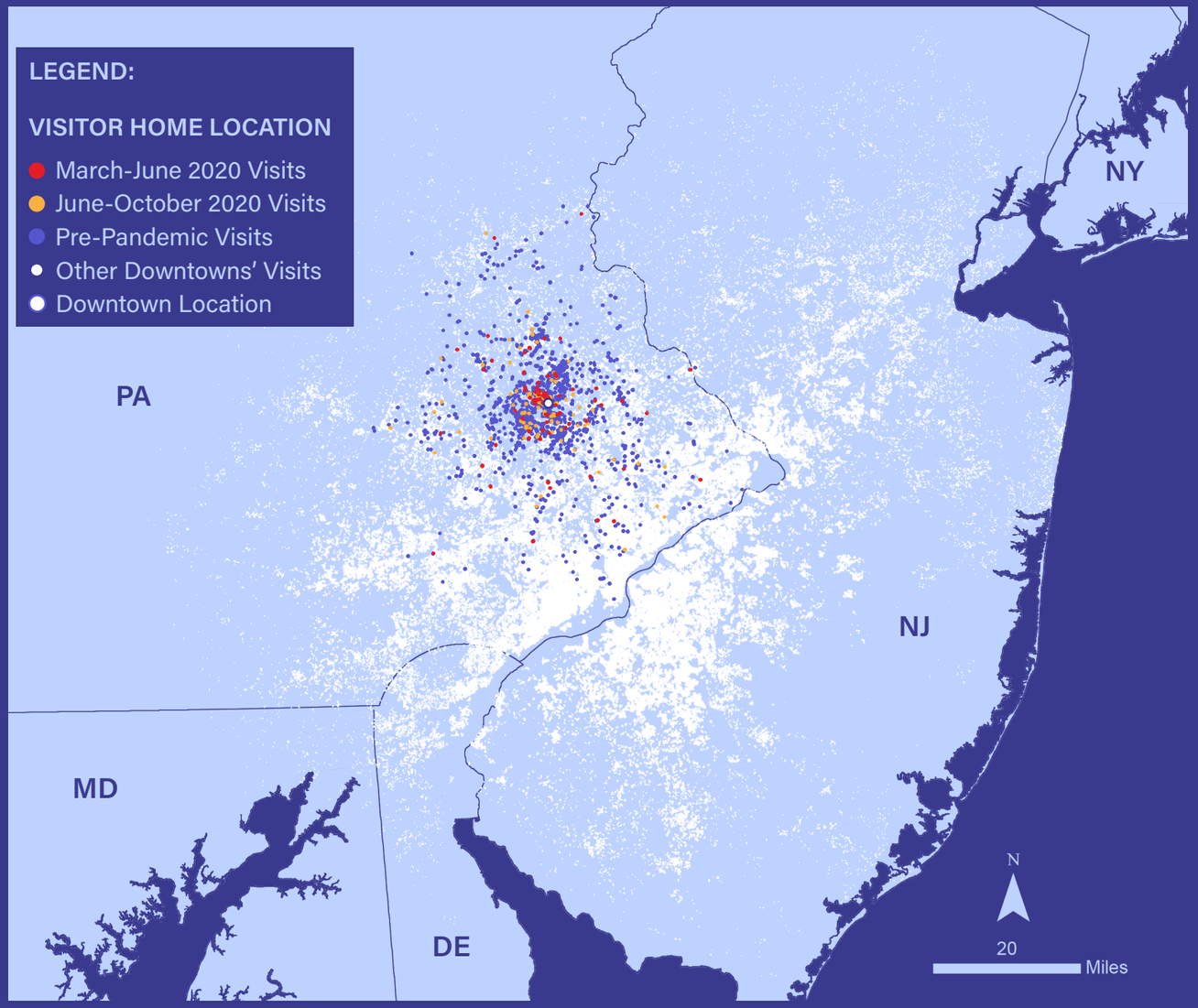

Visits to Downtown

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 Souderton were as follows:

- **Pre-Pandemic**

  Delaware: 0.0%
  Maryland: 0.0%
  New Jersey: 0.1%
  New York: 0.0%
  Pennsylvania: 99.9%

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

  Delaware: 0.0%
  Maryland: 0.0%
  New Jersey: 0.0%
  New York: 0.0%
  Pennsylvania: 100.0%

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

  Delaware: 0.0%
  Maryland: 0.0%
  New Jersey: 0.0%
  New York: 0.0%
  Pennsylvania: 100.0%

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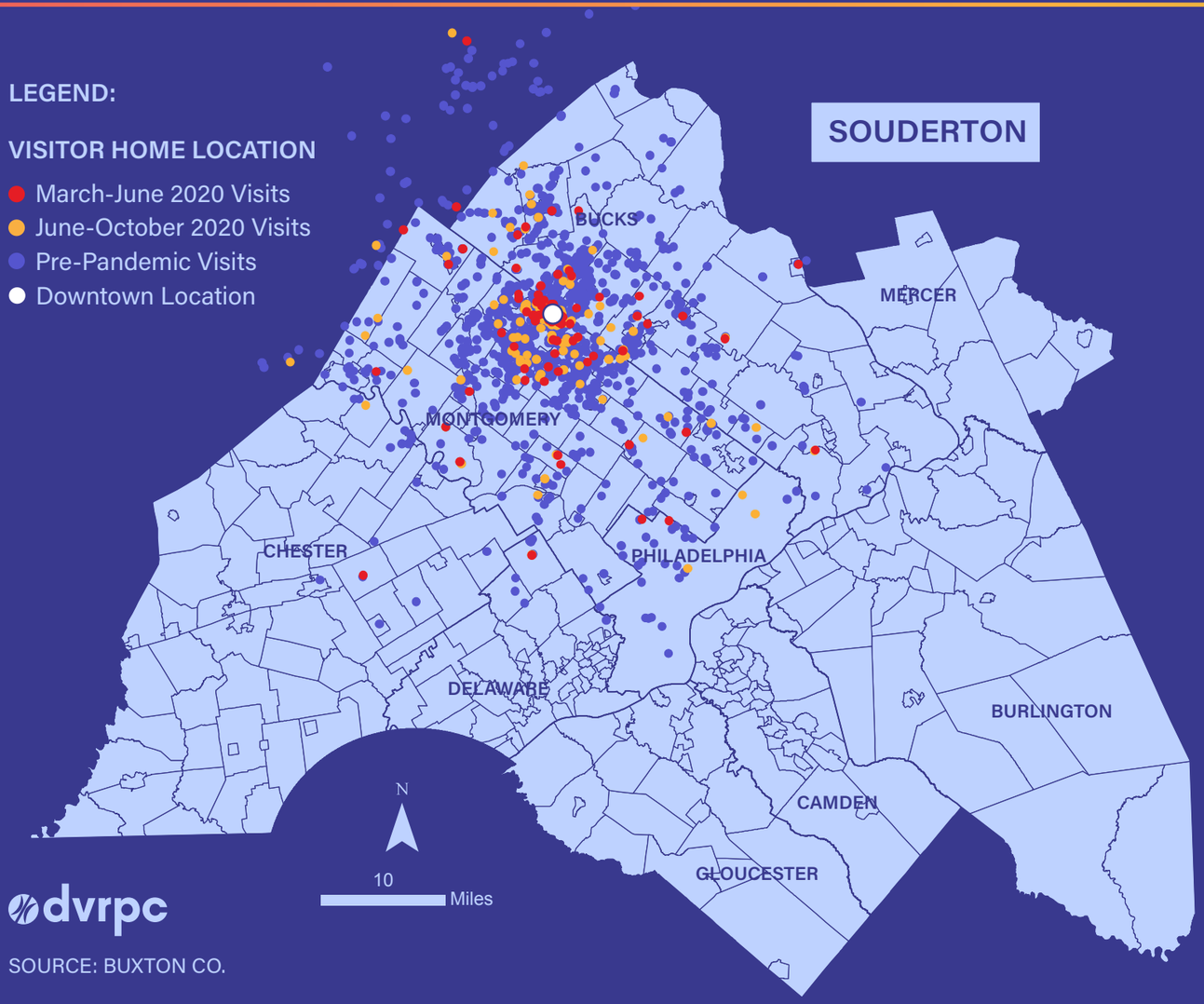
SOURCE: BUXTON CO.



Visits to Downtown

Pre-pandemic, visitors to Souderton primarily came from Bucks and Montgomery Counties, and somewhat from beyond the region. However, during the pandemic, the majority of visits came from nearby portions of Montgomery County.

Between August 2018 and March 2020, 1,992 people visited the downtown, which is significantly less than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 107 visits, and during the reopening period (June 16 - October 31) there were 142 visits to Souderton's downtown.

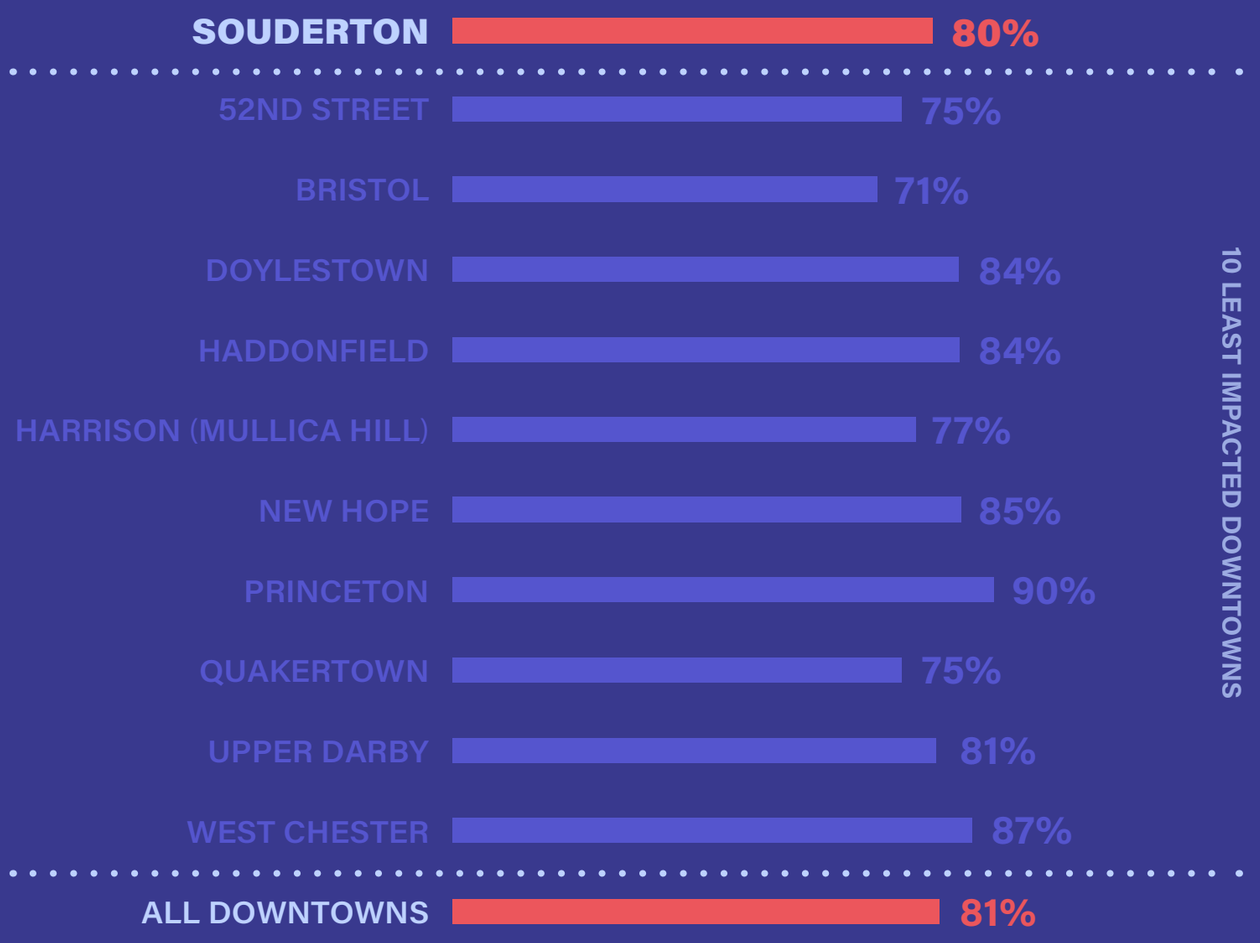
Shutdown Impact

March 13 - June 15, 2020

During the economic shutdown, there were 107 visits to Souderton's downtown compared to 528 visits during the same period in 2019. This equated to an 80% 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.

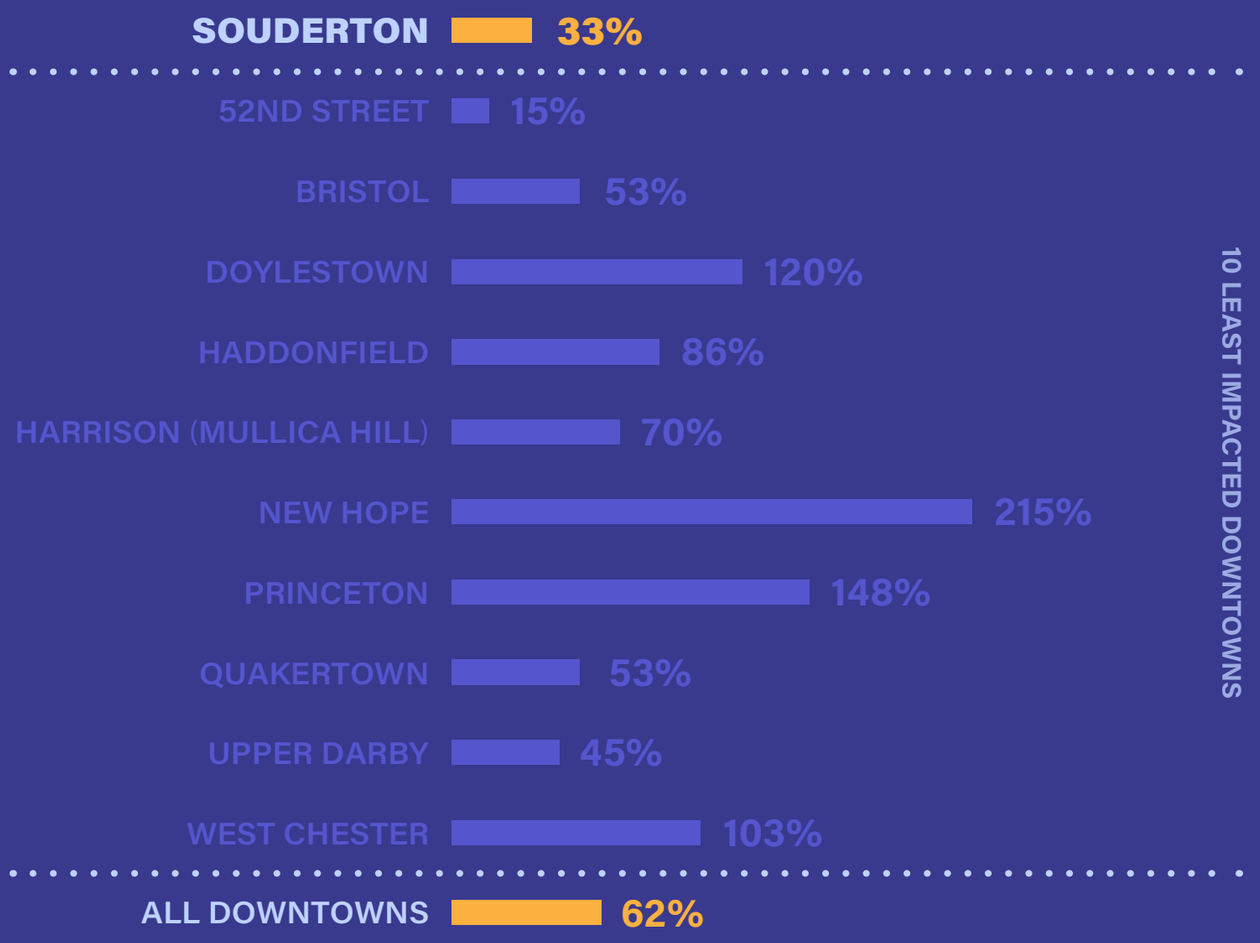
Reopening Rebound

June 16 - October 31, 2020

Visits to Souderton's downtown increased by 33%, one of the lowest rebounds observed, during the reopening period to a total of 142 visits. This was 82% fewer than the 787 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.

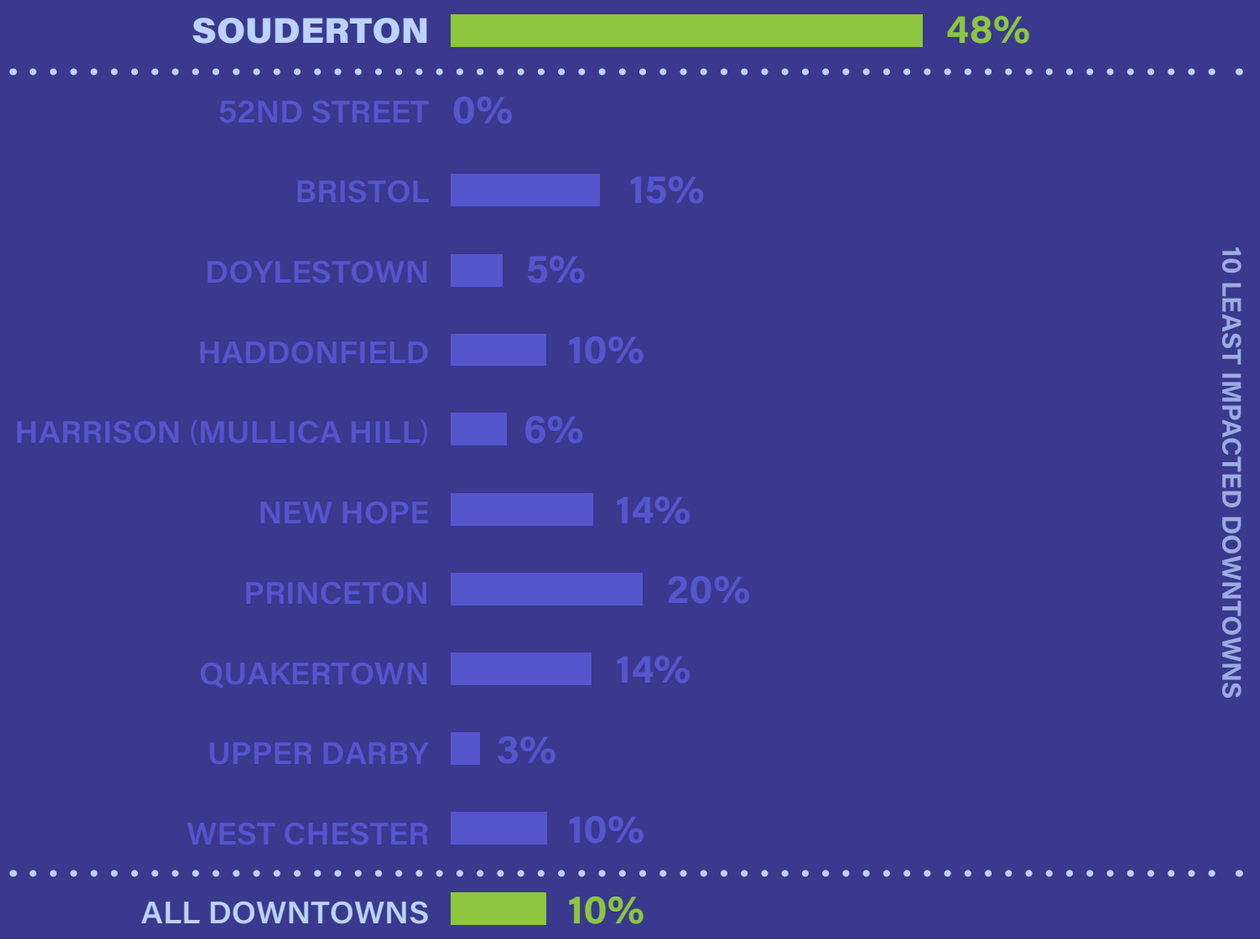
Trade Area Recovery

(Drive Time in Minutes)

Souderton's pre-pandemic trade area was a 25 minute drive time, which shrank by 60% during the shutdown to less than 10 minutes. During reopening, the trade area recovered by 48% 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, and that was larger during reopening (72 minutes).



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SOURCE: BUXTON CO.