

# 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 | Haddon Heights 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.

Haddon Heights' downtown scores 61 with regards to diversity, which makes it one of the least diverse downtowns in the region. Despite having a relatively walkable built environment, the downtown lacks a residential population or cultural uses, and is overly reliant upon *Neighborhood Goods & Services* (NGS) retailers.

The downtown's lack of diversity most likely played a role in the increased impact observed in Haddon Heights. This resulted in Haddon Heights receiving a Pandemic Impact Score of 58, which was one of the highest impact scores in the region.

61

## Diversity Score

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

58

## Pandemic Impact Score

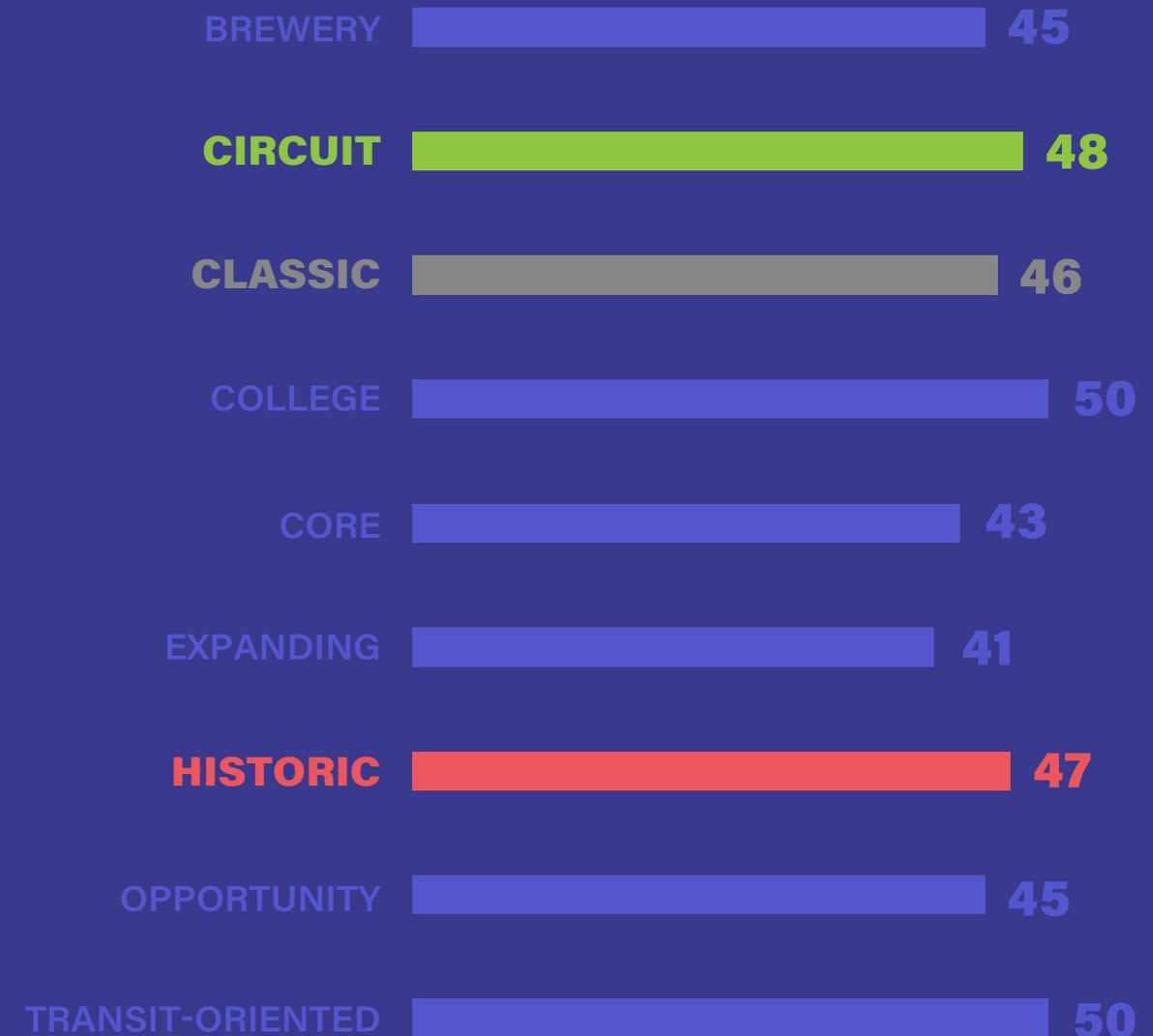
*Visits and trade area pre-pandemic, and during the shut-down and reopening periods*

# 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. Haddon Heights 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. This is slightly lower than Haddon Heights' score, which may be explained by 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.



# Downtown Population

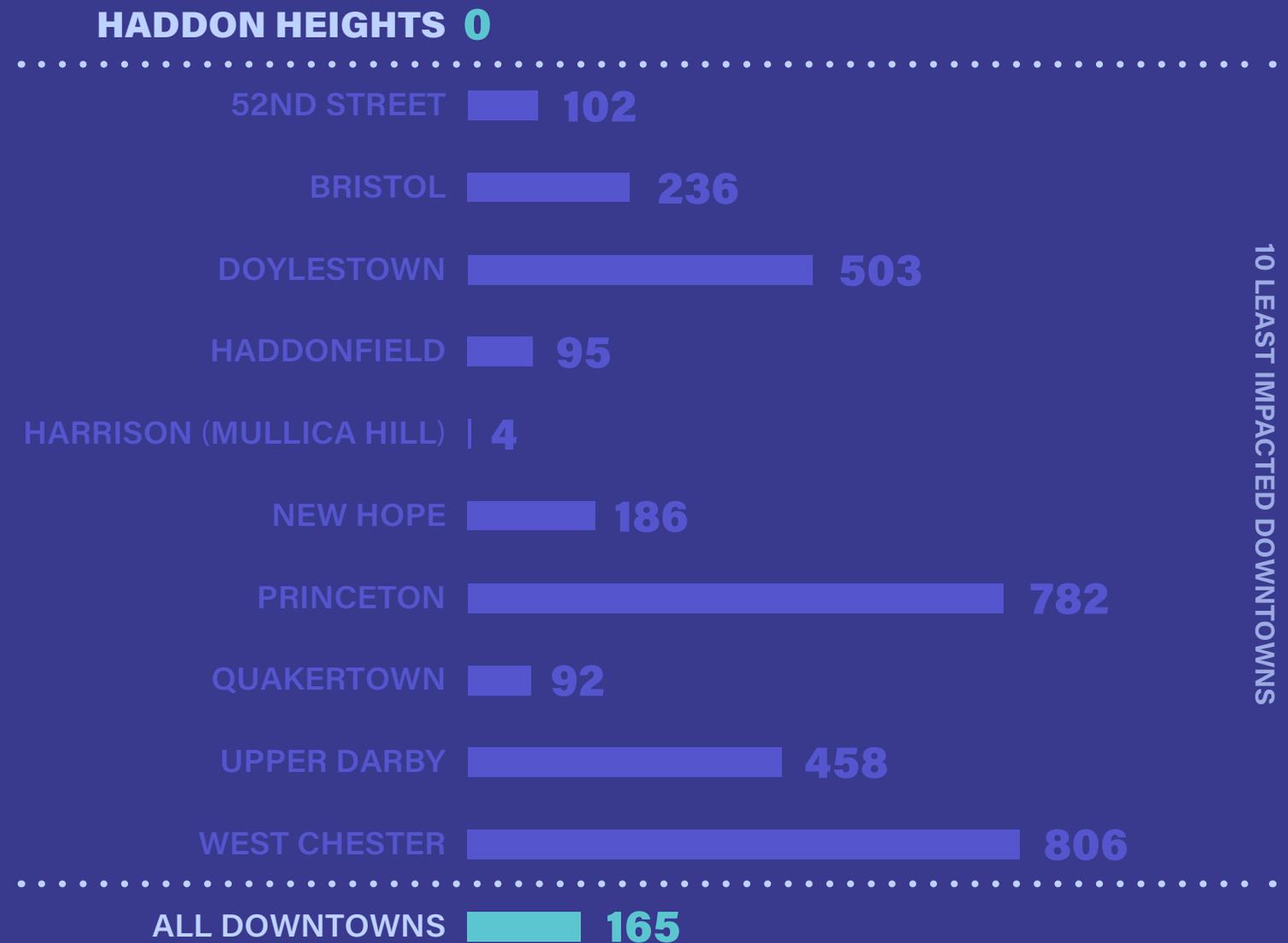
A negative correlation between the estimated population of the region's downtowns and the Pandemic Impact Score was identified. In other words, the larger the downtown population, the smaller the impact.

In 2019, Haddon Heights' downtown population was estimated at zero, which partially explains both the downtown's Diversity and Pandemic Impact Scores.

The average was 165 for all downtowns and 326 for the least impacted downtowns.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

# Mix of Uses

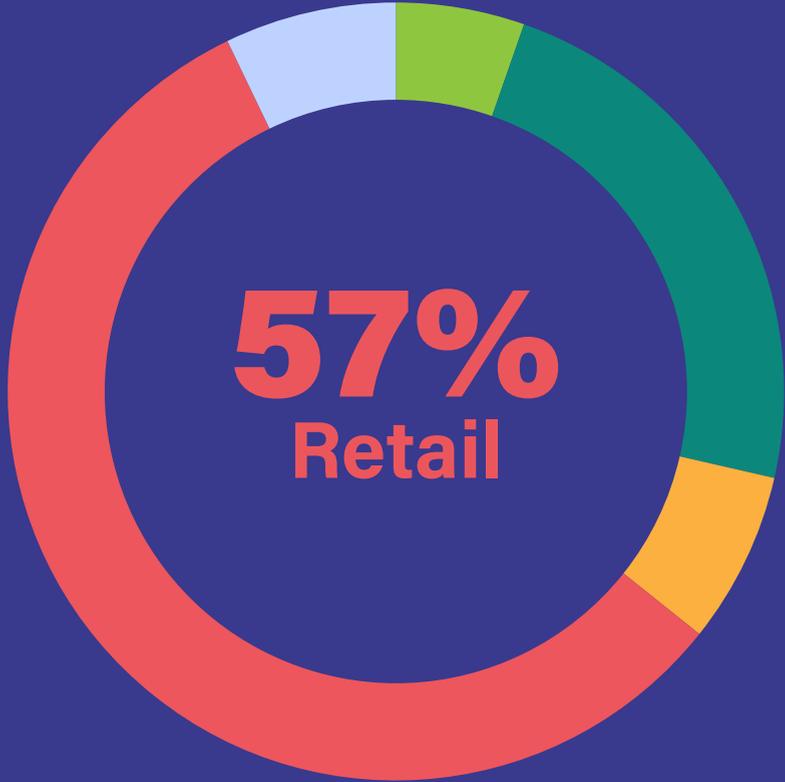
Retail accounts for 57% of the uses in Haddon Heights' downtown, which is equal to the average for all downtowns and slightly less than the average of 60% for the least impacted.

In the least impacted downtowns, *Food & Beverage (FB)* and *General Merchandise, Apparel, Furnishings & Other (GAFO)* made up larger shares of retail on average at 30% and 38% respectively. Conversely, *Neighborhood Goods & Services (NGS)* retailers made up a significantly smaller share on average at 30%. The greater the share of NGS retailers the higher Pandemic Impact Score, and Haddon Heights had one of the highest shares observed.

Of note, Haddon Heights was one of 15 downtowns to have at least one *Experiential (EXP)* retail use, which was a rising trend in the retail industry pre-pandemic. This may continue to be true post-pandemic as well.

## Retail Mix:

- 3% Experiential (EXP)
- 22% Food & Beverage (FB)
- 25% General Merchandise, Apparel, Furnishings, & Other (GAFO)
- 50% Neighborhood Goods & Services (NGS)



5% Civic

0% Cultural

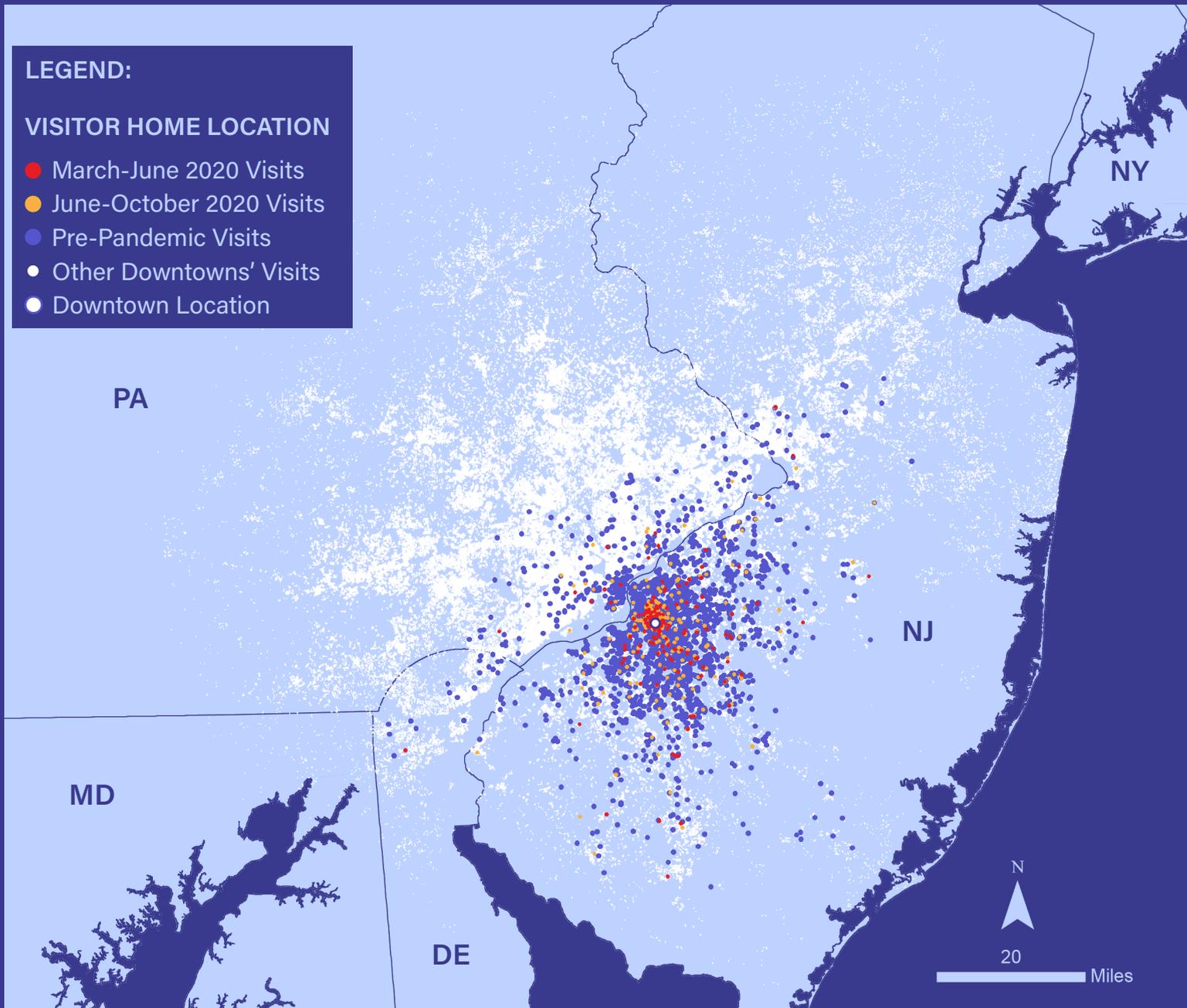
0% Institutional

23% Office

7% Residential

7% Vacancy





# 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 Haddon Heights were as follows:

- **Pre-Pandemic**
  - Delaware: 0.6%
  - Maryland: 0.0%
  - New Jersey: 92.9%
  - New York: 0.0%
  - Pennsylvania: 6.5%
- **Shutdown | March 13 - June 15, 2020**
  - Delaware: 0.5%
  - Maryland: 0.0%
  - New Jersey: 94.3%
  - New York: 0.0%
  - Pennsylvania: 5.2%
- **Reopening | June 16 - October 31, 2020**
  - Delaware: 0.0%
  - Maryland: 0.0%
  - New Jersey: 94.9%
  - New York: 0.0%
  - Pennsylvania: 5.1%

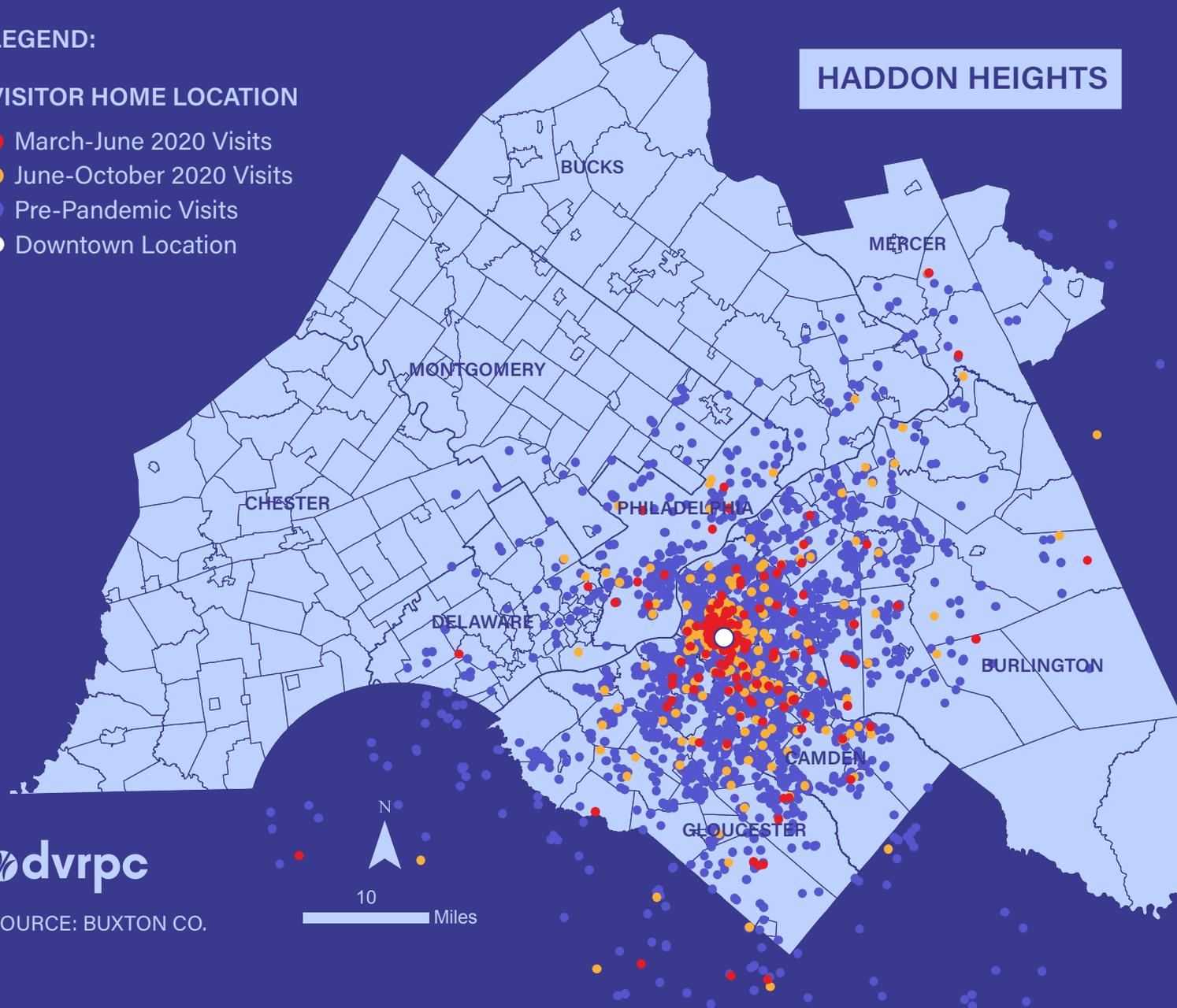


SOURCE: BUXTON CO.

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 Haddon Heights came from throughout Camden and Gloucester Counties, and somewhat from Burlington and Philadelphia Counties and outside of the region. However, during the pandemic, the majority of visits came from within Camden County.

Between August 2018 and March 2020, 4,412 people visited the downtown. This was approximately half of the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 208 visits, and during the reopening period (June 16 - October 31) there were 322 visits to Haddon Heights' downtown.

# Shutdown Impact

March 13 - June 15, 2020

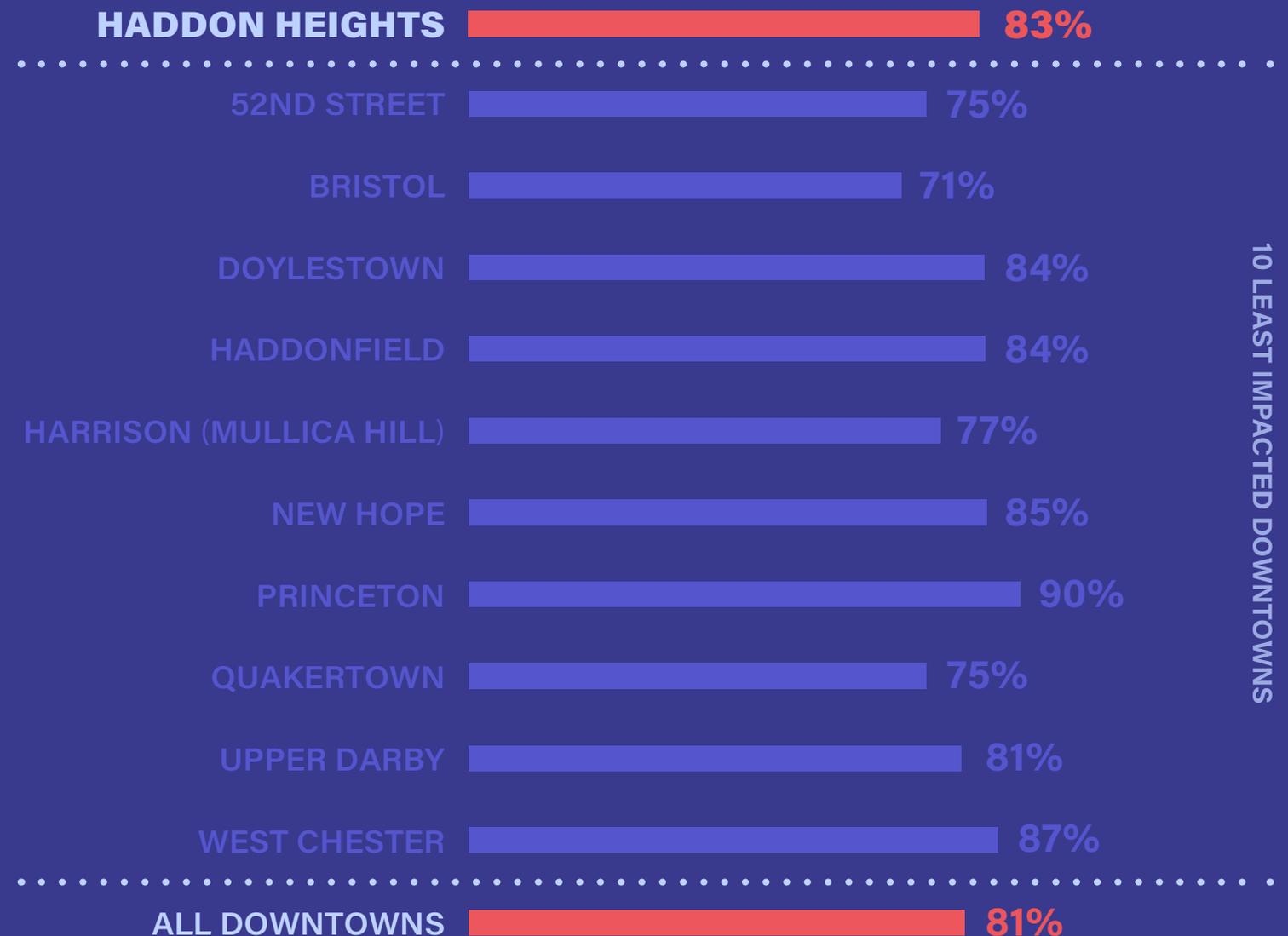
During the economic shutdown, there were 208 visits to Haddon Heights' downtown compared to 1,239 visits during the same period in 2019. This equated to an 83% reduction.

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.



10 LEAST IMPACTED DOWNTOWNS

# Reopening Rebound

June 16 - October 31, 2020

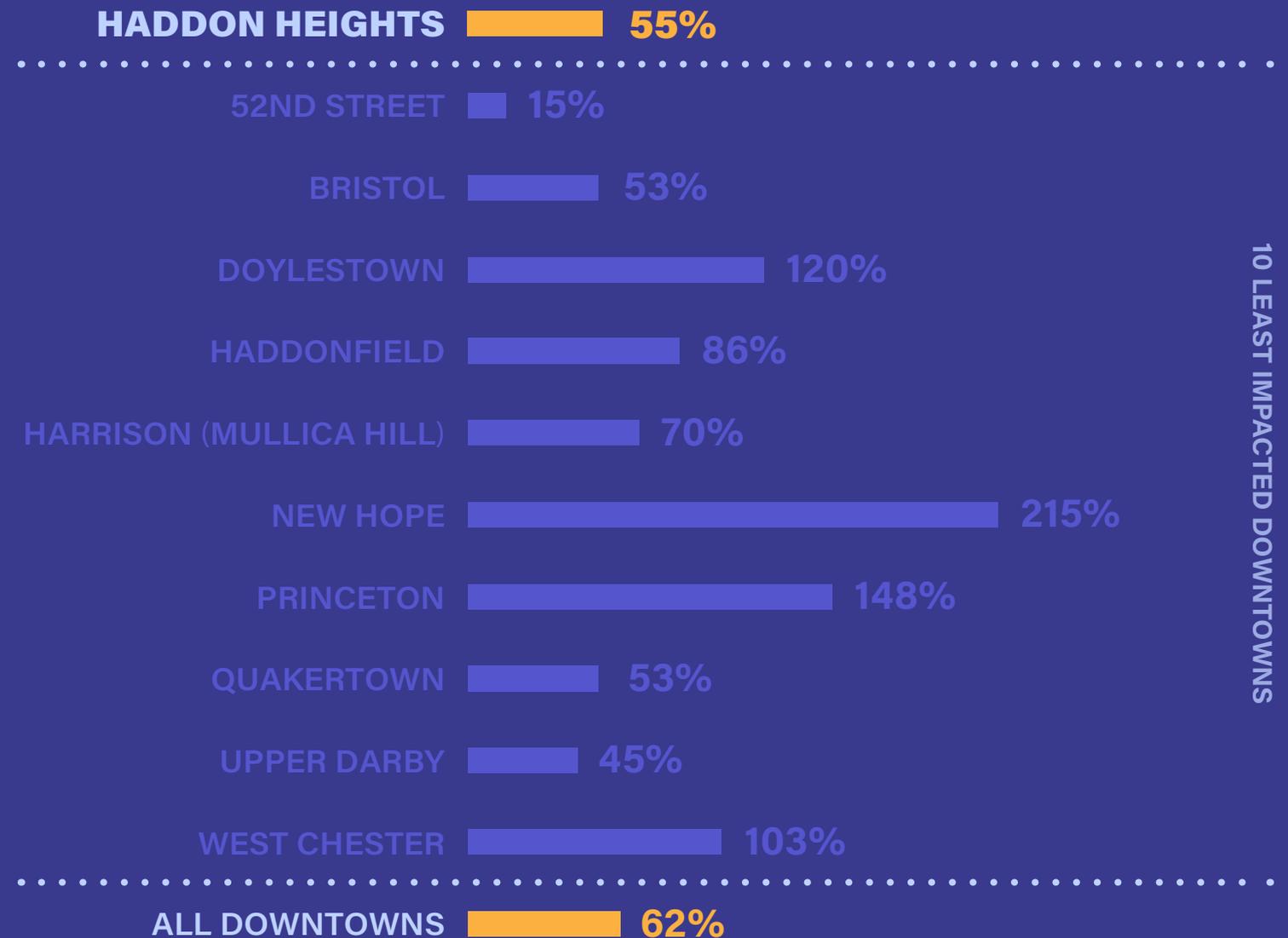
Visits to Haddon Heights' downtown increased by 55% during the reopening period to a total of 322 visits. This was 80% fewer than the 1,590 visits that occurred during the same period in 2019.

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.



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# Trade Area Recovery

(Drive Time in Minutes)

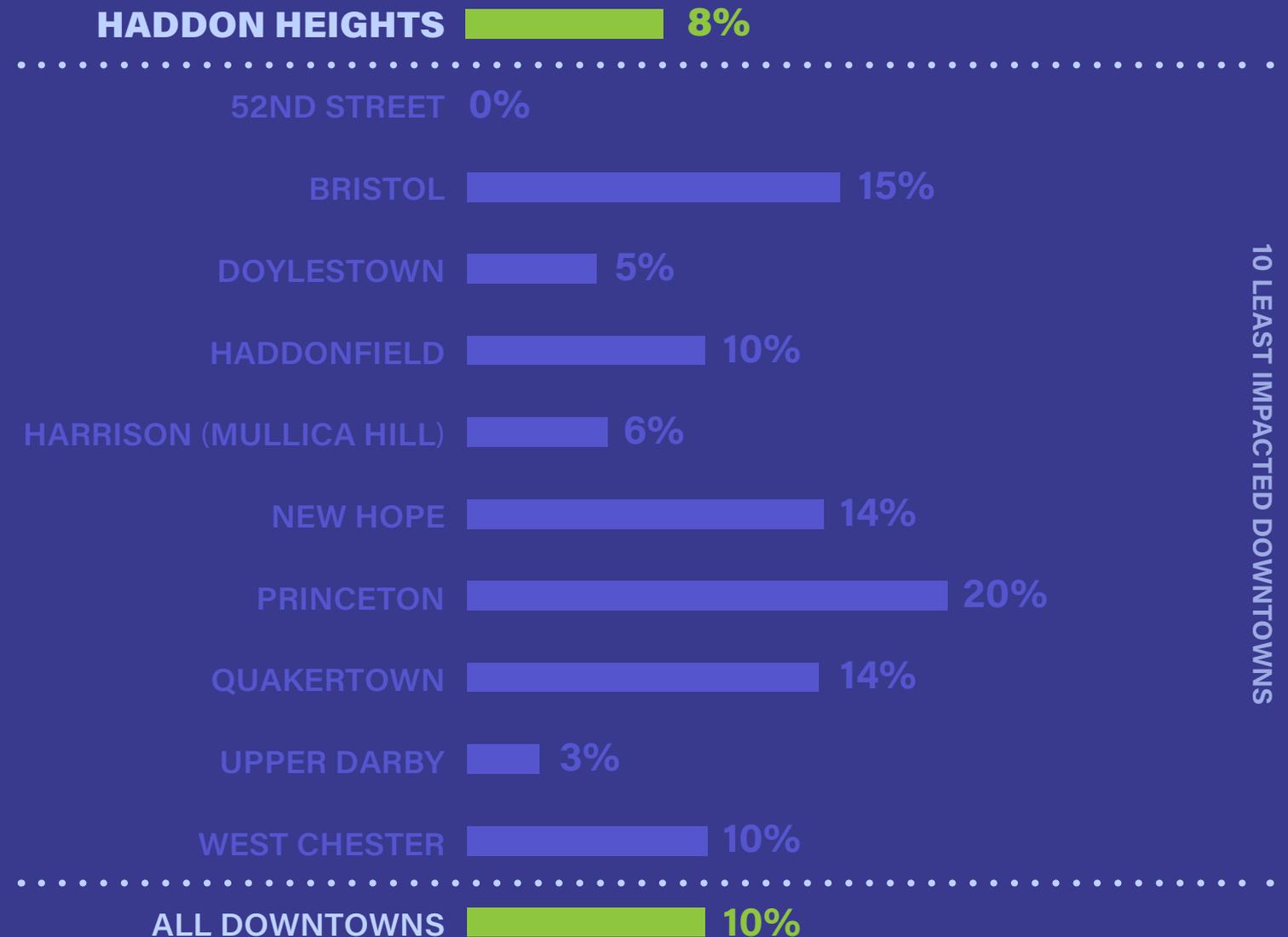
Haddon Heights' pre-pandemic trade area was a 25 minute drive time, which shrank by 12% during the shutdown to 22 minutes. During reopening, the trade area recovered by 8% to 24 minutes.

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.



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