

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 | Gloucester City, 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.

Gloucester City's downtown is somewhat walkable with a robust residential population, and a number of civic and office uses. However, it is overly reliant upon Neighborhood Goods & Services (NGS) retailers and has a relatively high vacancy rate. These characteristics are why the downtown earned a Diversity Score of 43, which indicates that the downtown is more diverse than the average downtown.

Despite being relatively diverse, Gloucester City's high vacancy rate and over-reliance upon NGS retailers most likely exacerbated the pandemic's impact. This is reflected in the downtown's average Pandemic Impact Scores of 50.

43

Diversity Score

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

50

Pandemic Impact Score

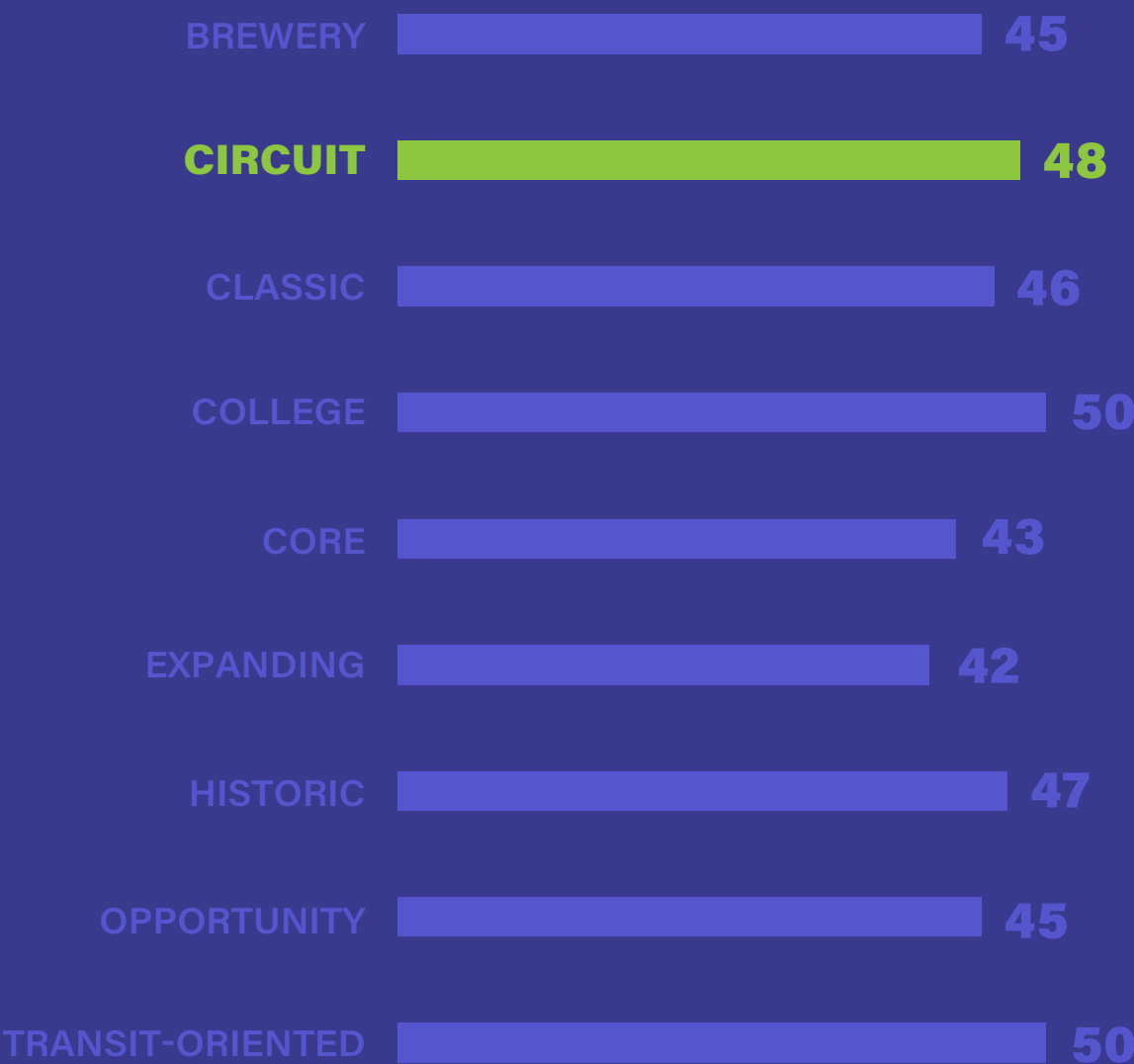
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

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. Gloucester City is considered to be one typology: *Circuit* (although the trail has not yet been built). Downtowns that are considered to be one typology had an average Pandemic Impact Score of 61.

It is important to note that *Circuit* downtowns that have not yet built their trail had an average score of 53 compared to an average Pandemic Impact Score of 48 for those that have built their trail.



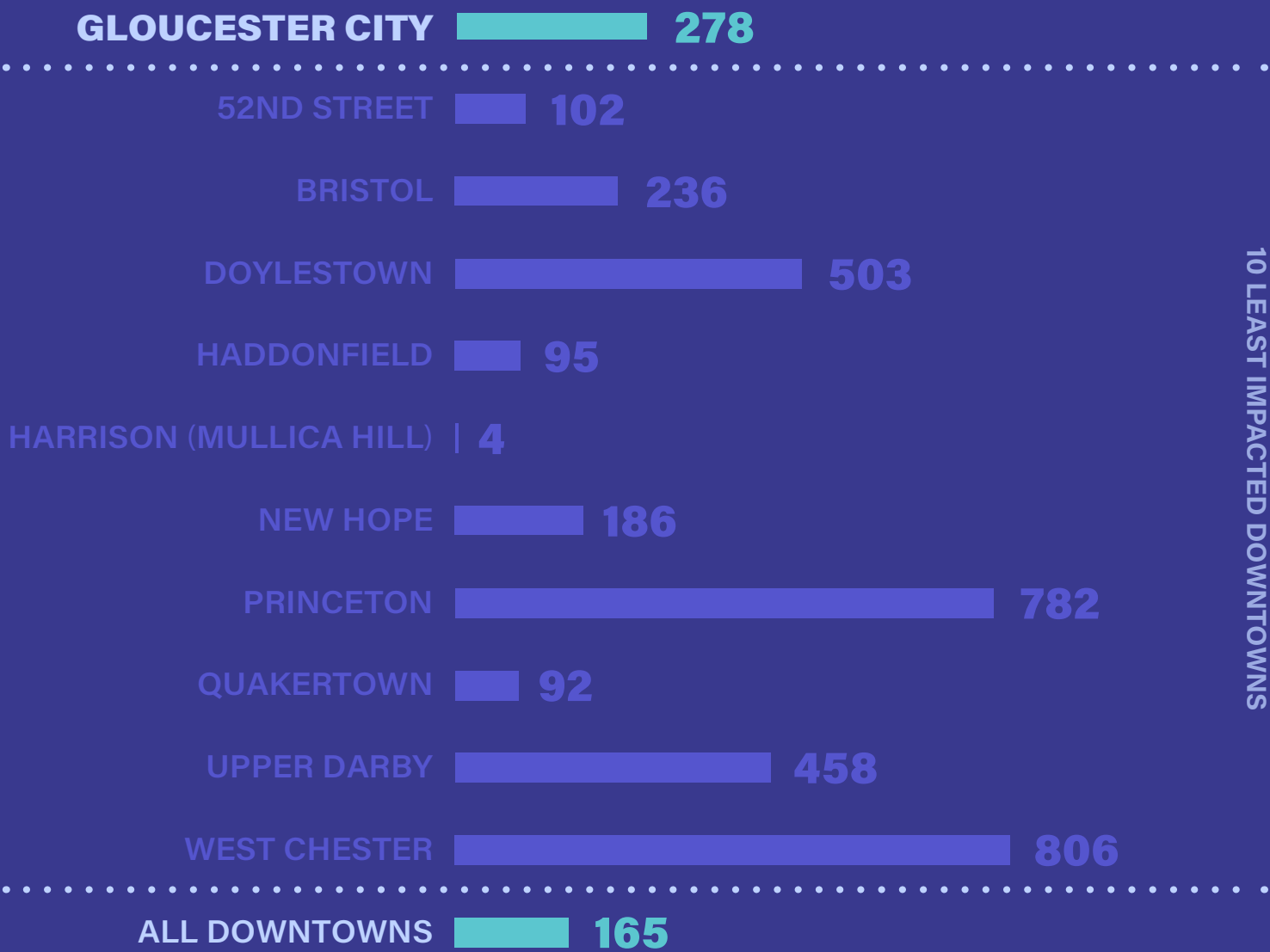
Downtown Population

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, Gloucester City’s downtown population was estimated to be 278, which was higher than the average of 165 for all downtowns and less than the average population of 326 for the least impacted downtowns.



SOURCE: BUXTON CO.



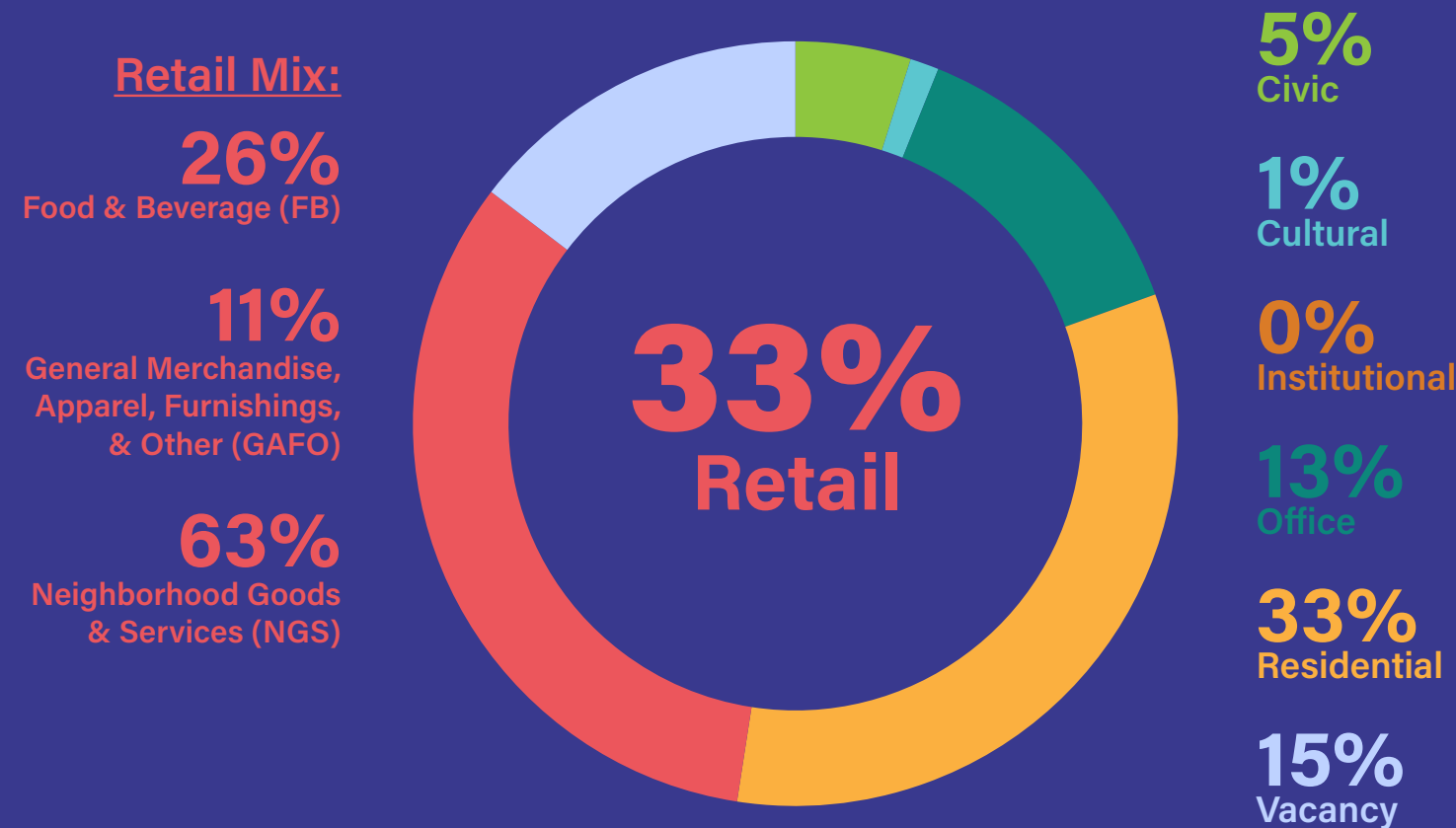
10 LEAST IMPACTED DOWNTOWNS

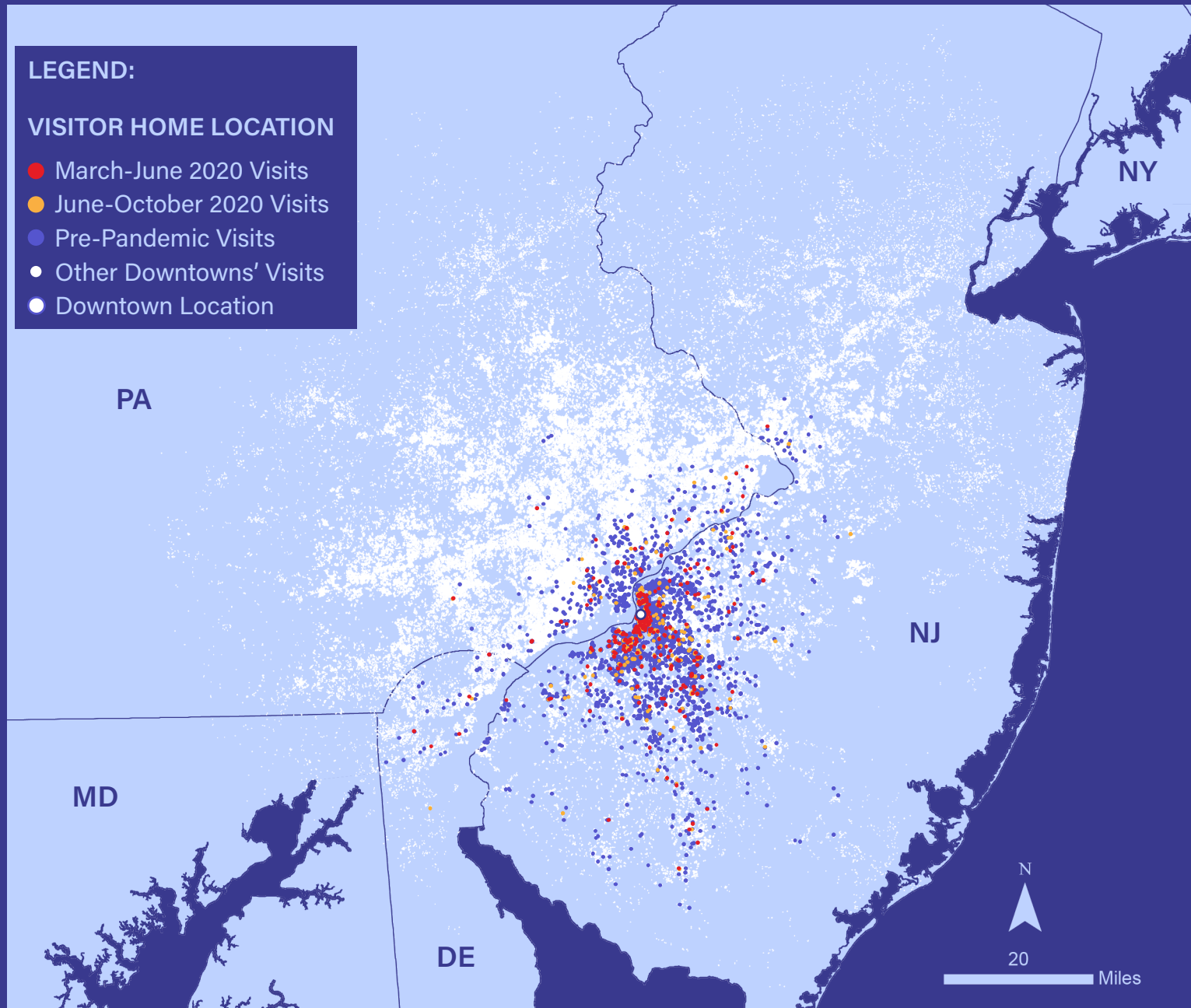
Mix of Uses

Retail accounts for 33% of the uses in Gloucester City's downtown, which is one of the lowest shares observed, this may have helped mitigate the pandemic's impact. The average for all downtowns was 57%, and it was 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%, and the average vacancy rate was 8% in the least impacted downtowns. On average, as the share of NGS retailers or a downtown's 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 Gloucester City were as follows:

● Pre-Pandemic

Delaware: 0.7%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 8.8%
New Jersey: 90.5%	

● Shutdown | March 13 - June 15, 2020

Delaware: 1.3%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 7.5%
New Jersey: 91.2%	

● Reopening | June 16 - October 31, 2020

Delaware: 0.5%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 6.1%
New Jersey: 93.4%	

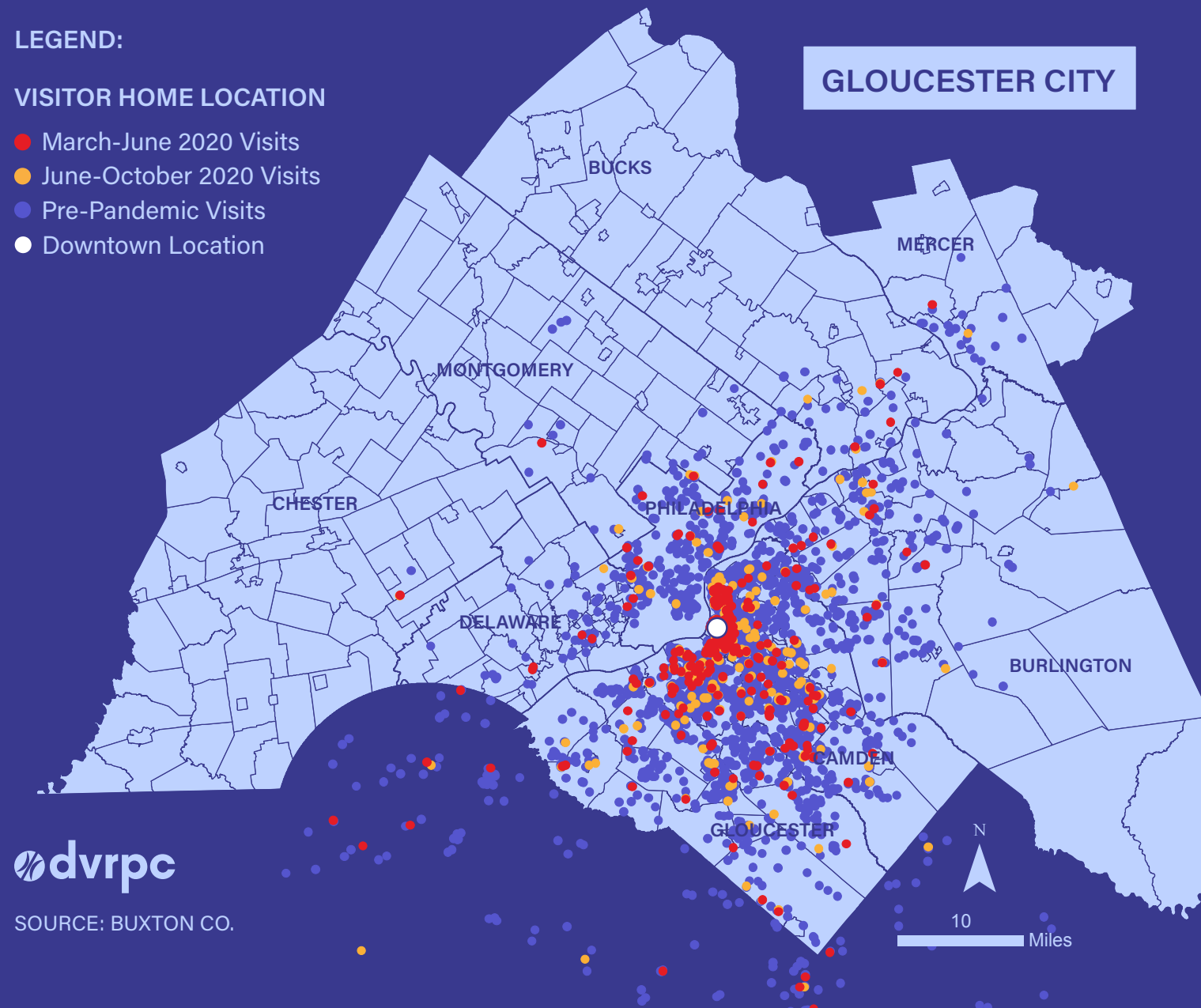


SOURCE: BUXTON CO.

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 Gloucester City came from throughout southern New Jersey, as well as Philadelphia and parts of Delaware. However, during the pandemic, the majority of visits came from nearby portions of Camden and Gloucester Counties.

Between August 2018 and March 2020, 4,674 people visited the downtown. This was slightly more than half the average of 8,800 for all of the downtowns.

During the shutdown (March 13 - June 15) there were 432 visits, and during the reopening period (June 16 - October 31) there were 421 visits to Gloucester City.

Shutdown Impact

March 13 - June 15, 2020

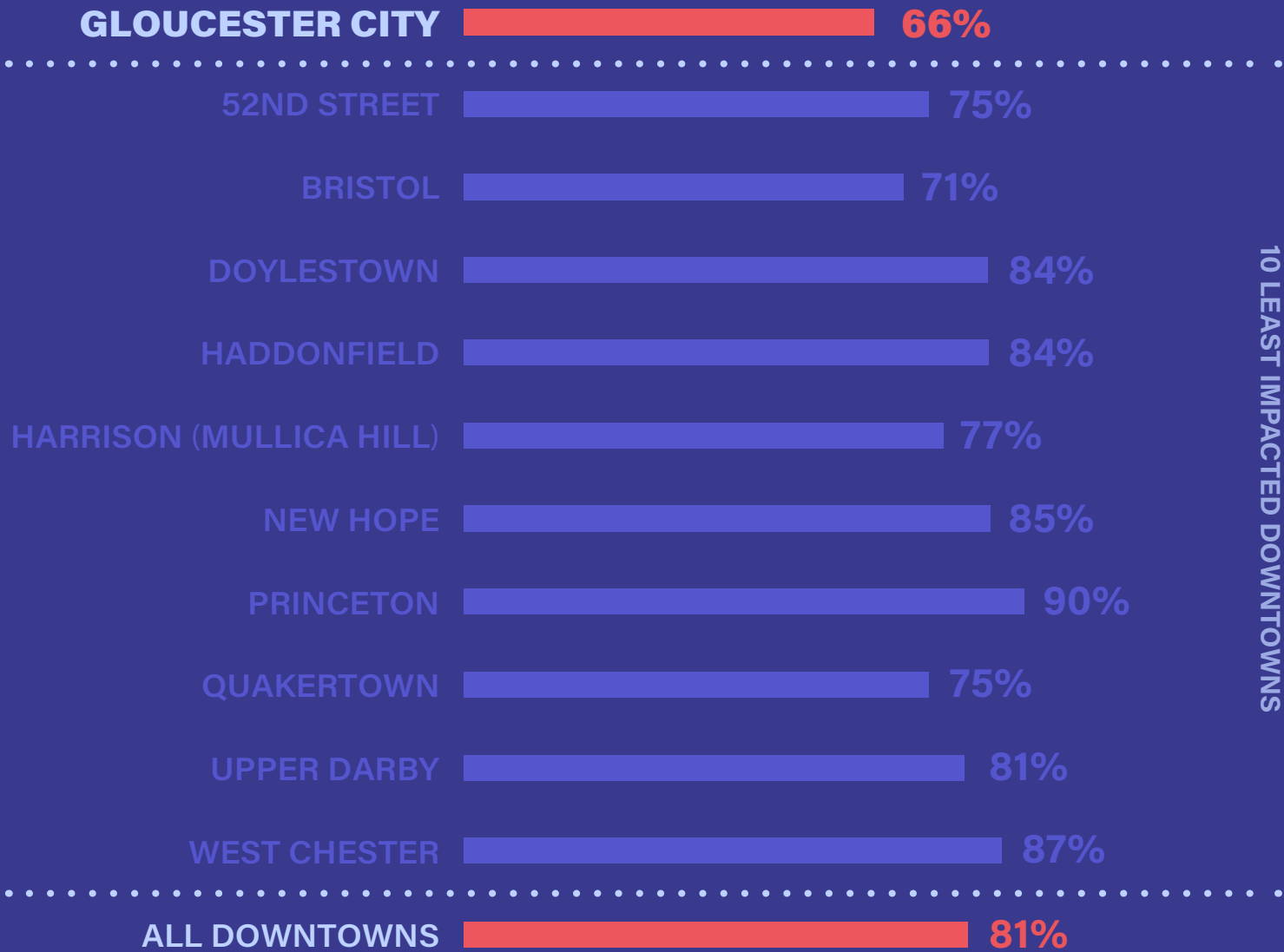
During the economic shutdown, there were 432 visits to Gloucester City’s downtown compared to 1,268 visits during the same period in 2019. This equated to a 66% reduction, which was the smallest reduction observed.

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

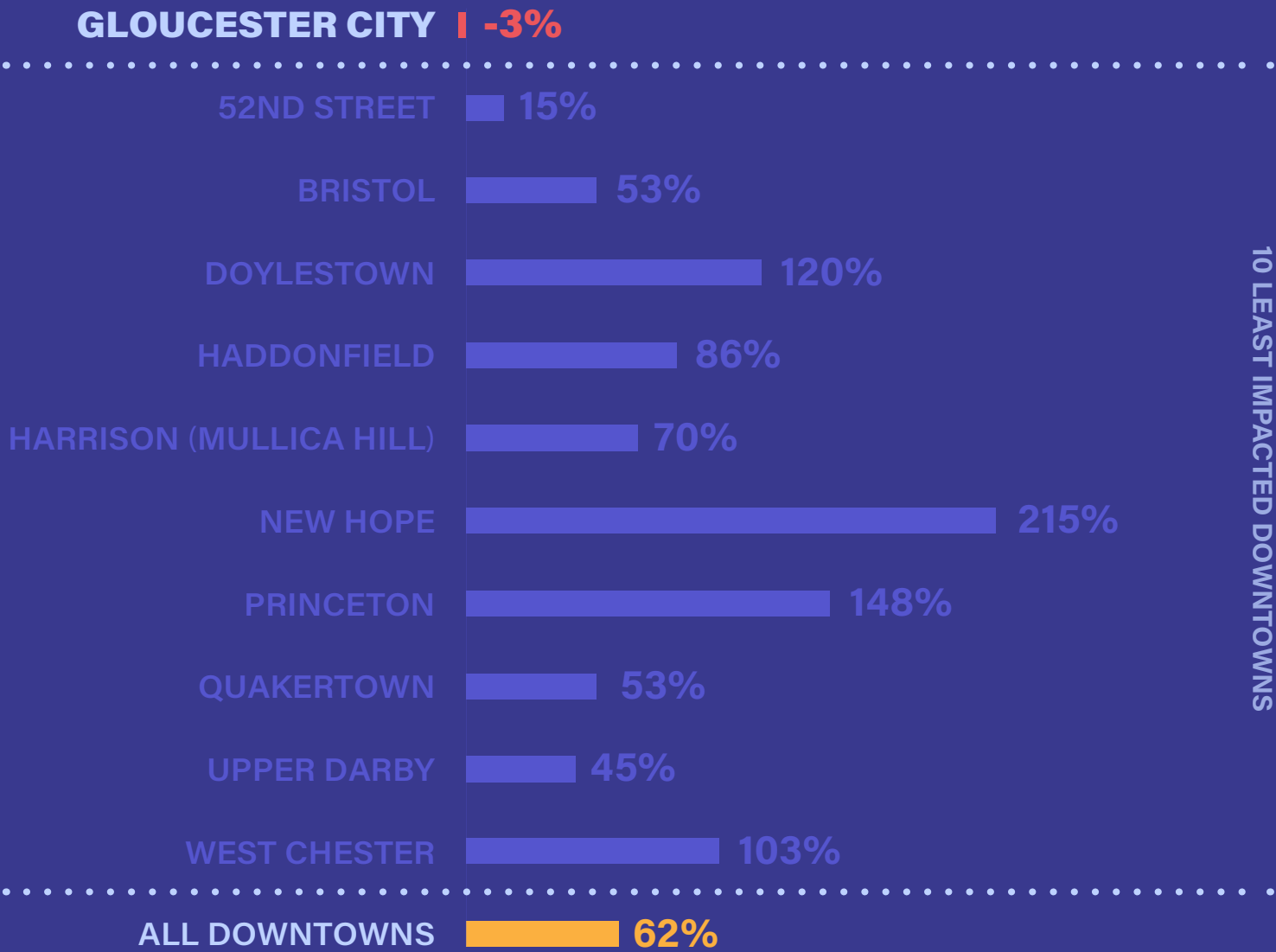
Visits to Gloucester City's downtown further decreased by 3% during the reopening period to a total of 421 visits. This was 74% fewer than the 1,626 visits that occurred during the same period in 2019. The only other downtown to observe a further reduction during reopening was Narberth Borough.

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.



Trade Area Recovery

(Drive Time in Minutes)

Gloucester City’s pre-pandemic trade area was a 28 minute drive time, which only shrank by 14% during the shutdown to 24 minutes. However, during reopening, the trade area shrank by an additional 4% to 23 minutes. Gloucester City was one of only four downtowns to see a further reduction of its trade area 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).



SOURCE: BUXTON CO.

