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.

DELAWARE VALLEY
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REGIONAL PLANNING COMMISSION

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 | Berlin 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.

Berlin's downtown has a number of civic and cultural uses. However, it lacks the walkable built environment and permanent residential population observed in less impacted downtowns, and its retail mix is overly reliant upon *Neighborhood Goods & Services* (NGS). Therefore, the downtown received a Diversity Score of 60, which reflects its relative lack of diversity.

The downtown's lack of diversity most likely exacerbated the pandemic's impact, specifically the reliance on NGS retailers. This is reflected in its relatively high Pandemic Impact Score of 61.

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

61 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. Berlin is considered to be one typology: *Historic.* Downtowns considered to be one typology had an average Pandemic Impact Score of 61.

BREWERY 45

CIRCUIT 48

CLASSIC 46

COLLEGE 50

CORE 43

EXPANDING 42

HISTORIC 47

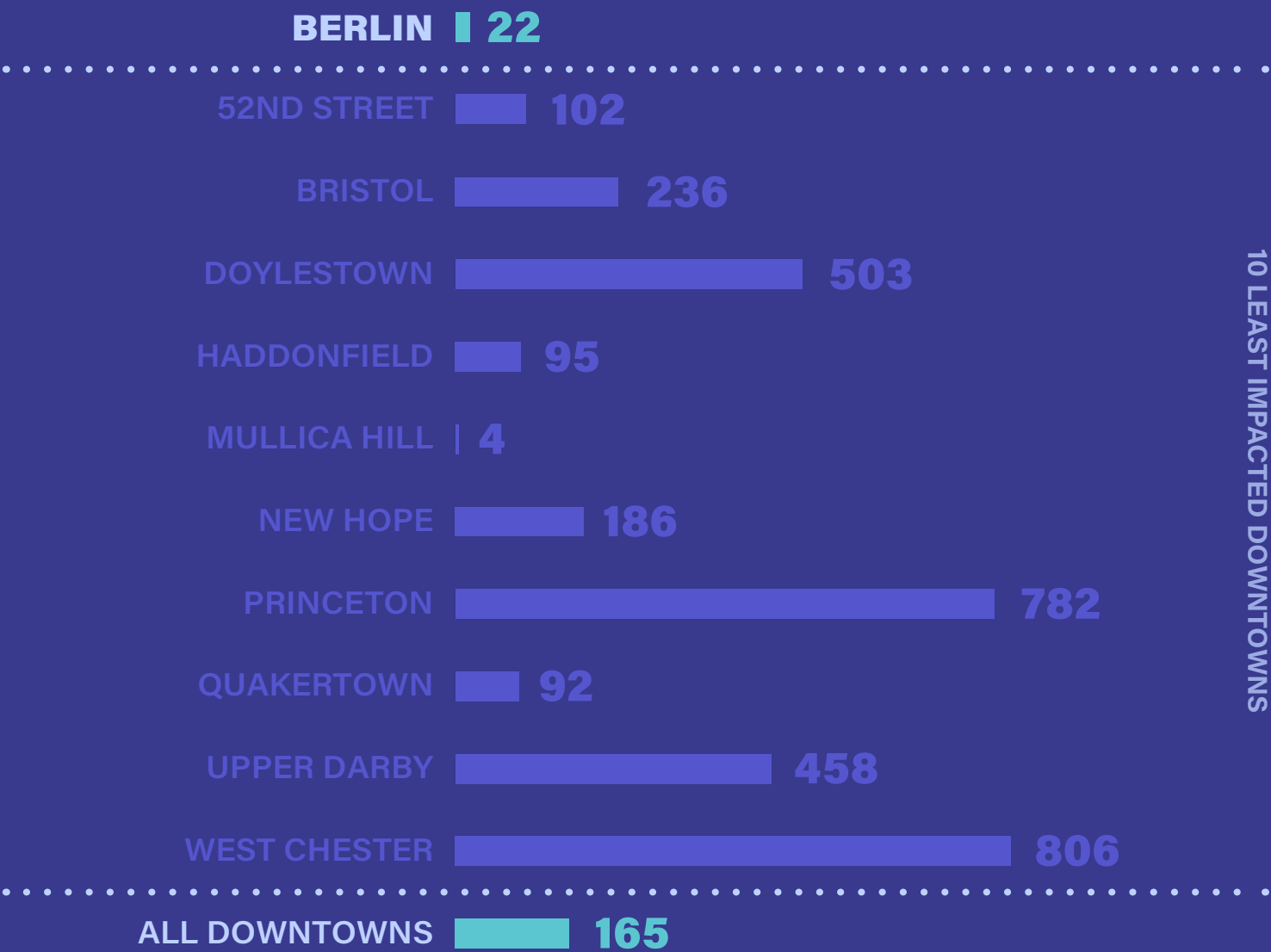OPPORTUNITY 45

TRANSIT-ORIENTED 50

dvrpc
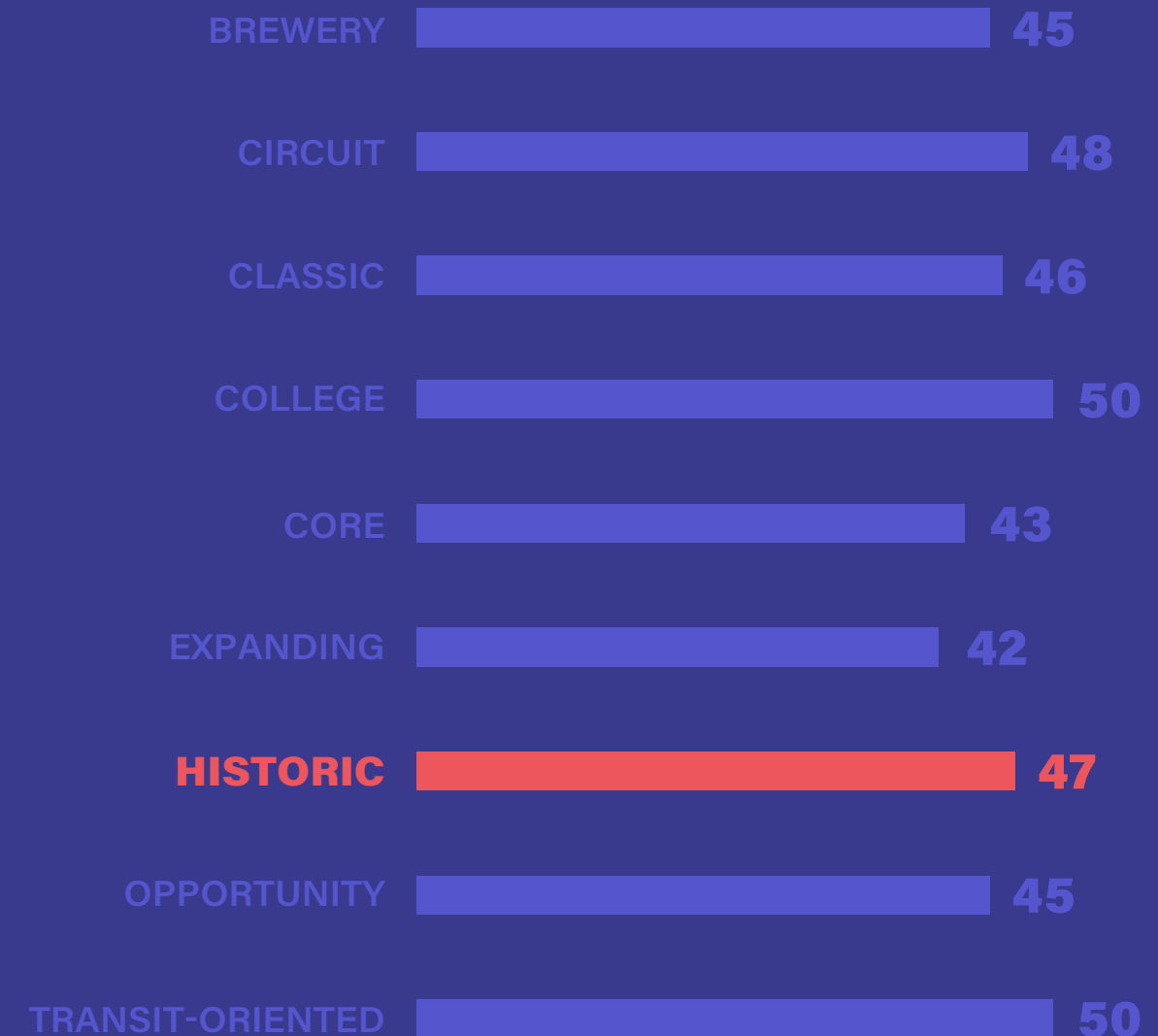
Downtown Population

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, Berlin's downtown population was estimated to be 22, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.

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SOURCE: BUXTON CO.

BERLIN 22

52ND STREET 102

BRISTOL 236

DOYLESTOWN 503

HADDONFIELD 95

MULLICA HILL 4

NEW HOPE 186

PRINCETON 782

QUAKERTOWN 92

UPPER DARBY 458

WEST CHESTER 806

ALL DOWNTOWNS 165

Mix of Uses

Retail Mix:

6%
Food & Beverage (FB)

44%
General Merchandise, Apparel, Furnishings, & Other (GAFO)

50%
Neighborhood Goods & Services (NGS)

44% Retail

5% Civic

12% Cultural

0% Institutional

20% Office

**7%** Residential

12% Vacancy

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Retail accounts for 44% of the uses in Berlin's downtown, which is one of the lowest shares observed. The average was 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage* (FB) makes up a significantly larger share of retail uses at 30%, while *General Merchandise, Apparel, Furnishings & Other* (GAFO) makes up a smaller share at 38%. On average as the share of each of these increased, the Pandemic Impact Score decreased.

Conversely, as the share of *Neighborhood Goods & Services* (NGS) retailers increased so did the Pandemic Impact Score. In the least impacted downtowns, NGS retailers made up a significantly smaller share at 30%.

Additionally, as the vacancy rate increased, so did the Pandemic Impact Score. At 12%, Berlin's vacancy rate is higher than average.
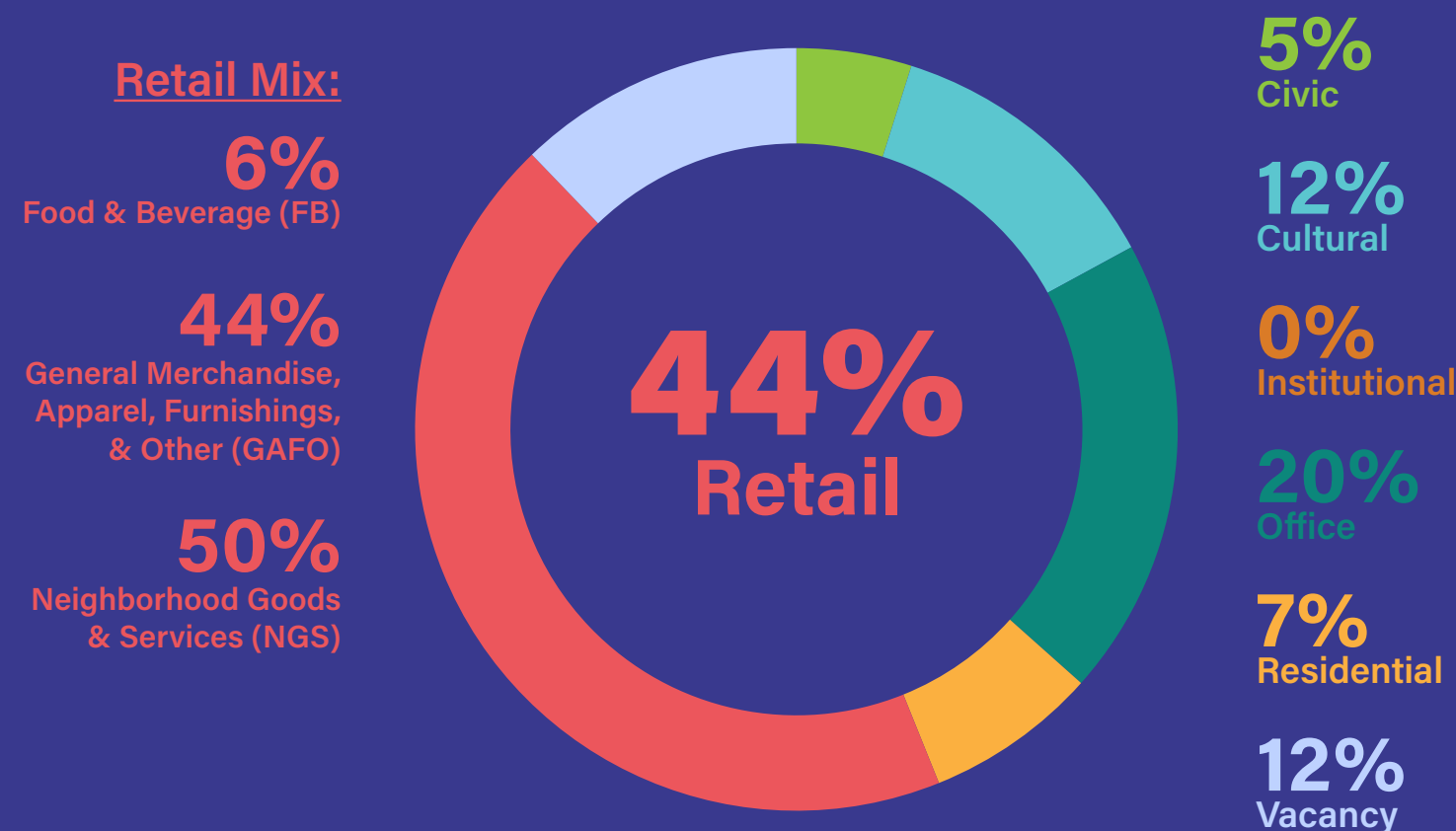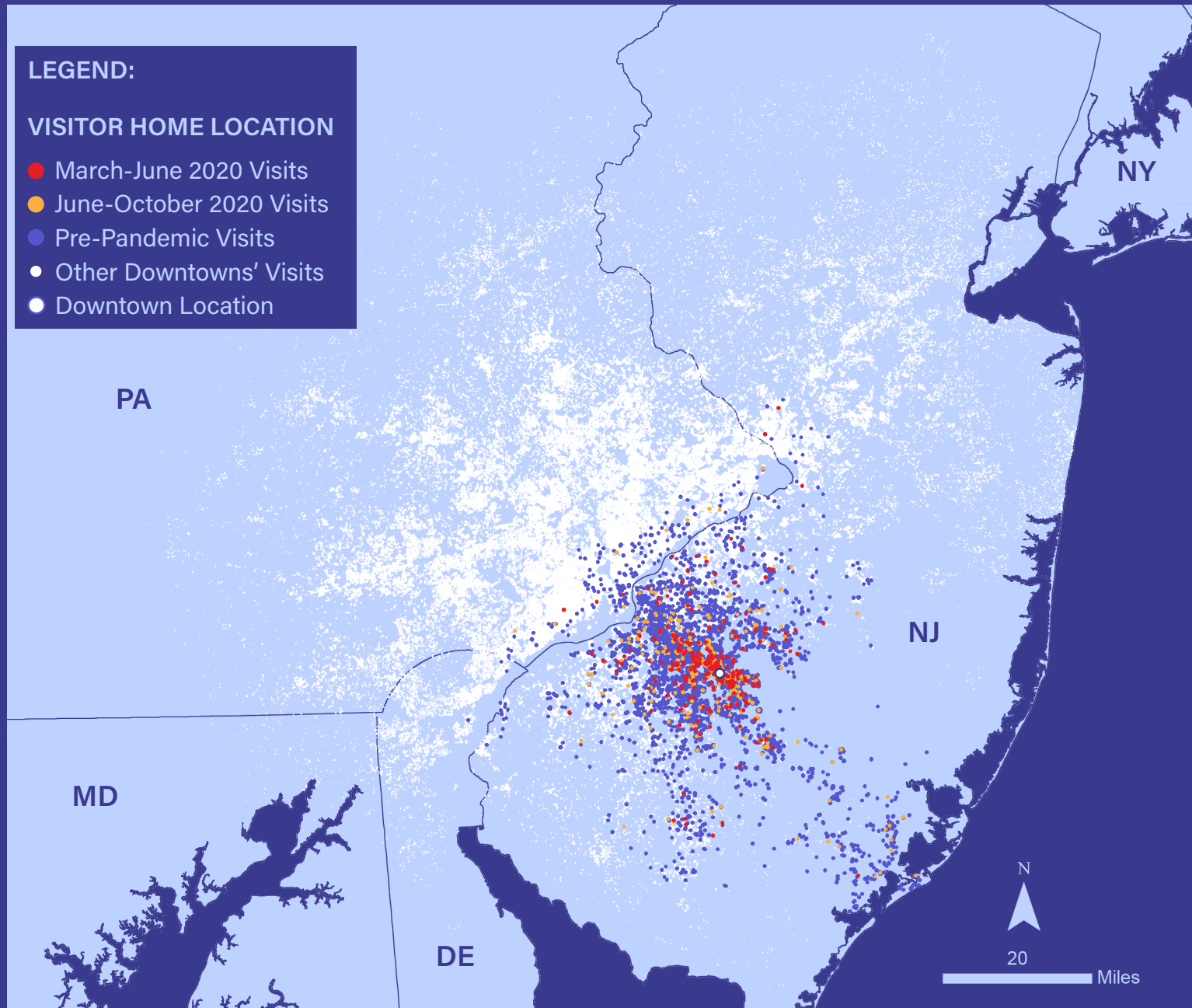
Visits to Downtown

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 Berlin were as follows:

LEGEND:

VISITOR HOME LOCATION
- 🔴 March-June 2020 Visits
- 🟠 June-October 2020 Visits
- 🟣 Pre-Pandemic Visits
- ⚪ Other Downtowns' Visits
- ⚪ Downtown Location

● **Pre-Pandemic**

Delaware: 0.0%   New York: 0.0%
Maryland: 0.0%   Pennsylvania: 2.9%
New Jersey: 97.0%

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

Delaware: 0.0%   New York: 0.0%
Maryland: 0.0%   Pennsylvania: 1.0%
New Jersey: 99.0%

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

Delaware: 0.0%   New York: 0.0%
Maryland: 0.0%   Pennsylvania: 2.5%
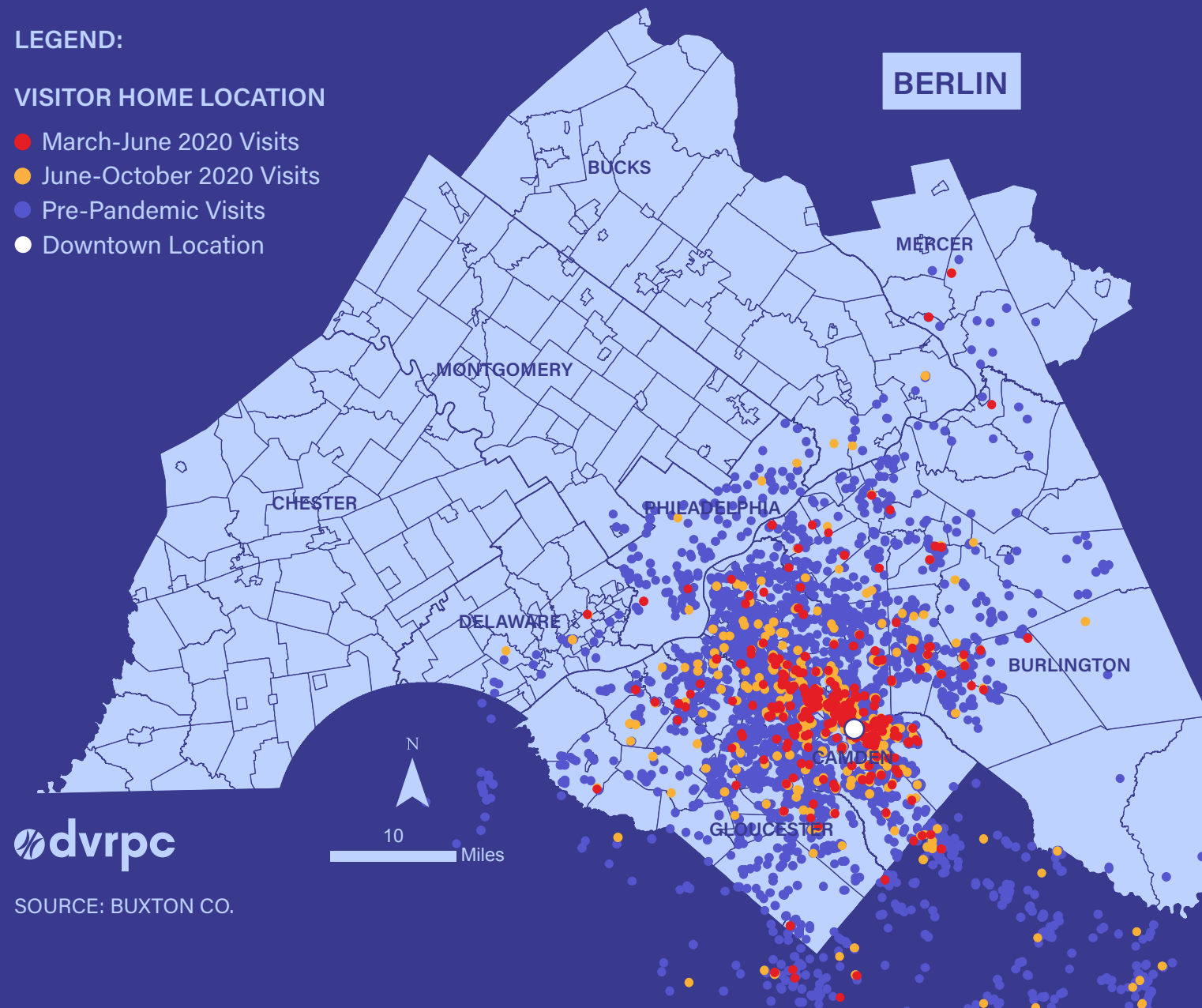New Jersey: 97.5%

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SOURCE: BUXTON CO.

Visits to Downtown

Prior to the pandemic, people visiting Berlin's downtown lived primarily throughout southern New Jersey. However, during the pandemic, most visits came from nearby areas within Camden and Gloucester Counties.

Between August 2018 and March 2020, 6,516 people visited the downtown. This was less than the average of 8,800 for all of the downtowns.

During the shutdown (March 13 - June 15) there were 318 visits to Berlin's downtown, and during the reopening period (June 16 - October 31) there were 471 visits.

BERLIN

BUCKS

MERCER

MONTGOMERY

CHESTER

PHILADELPHIA

DELAWARE

BURLINGTON

CAMDEN

GLOUCESTER

N

10 Miles
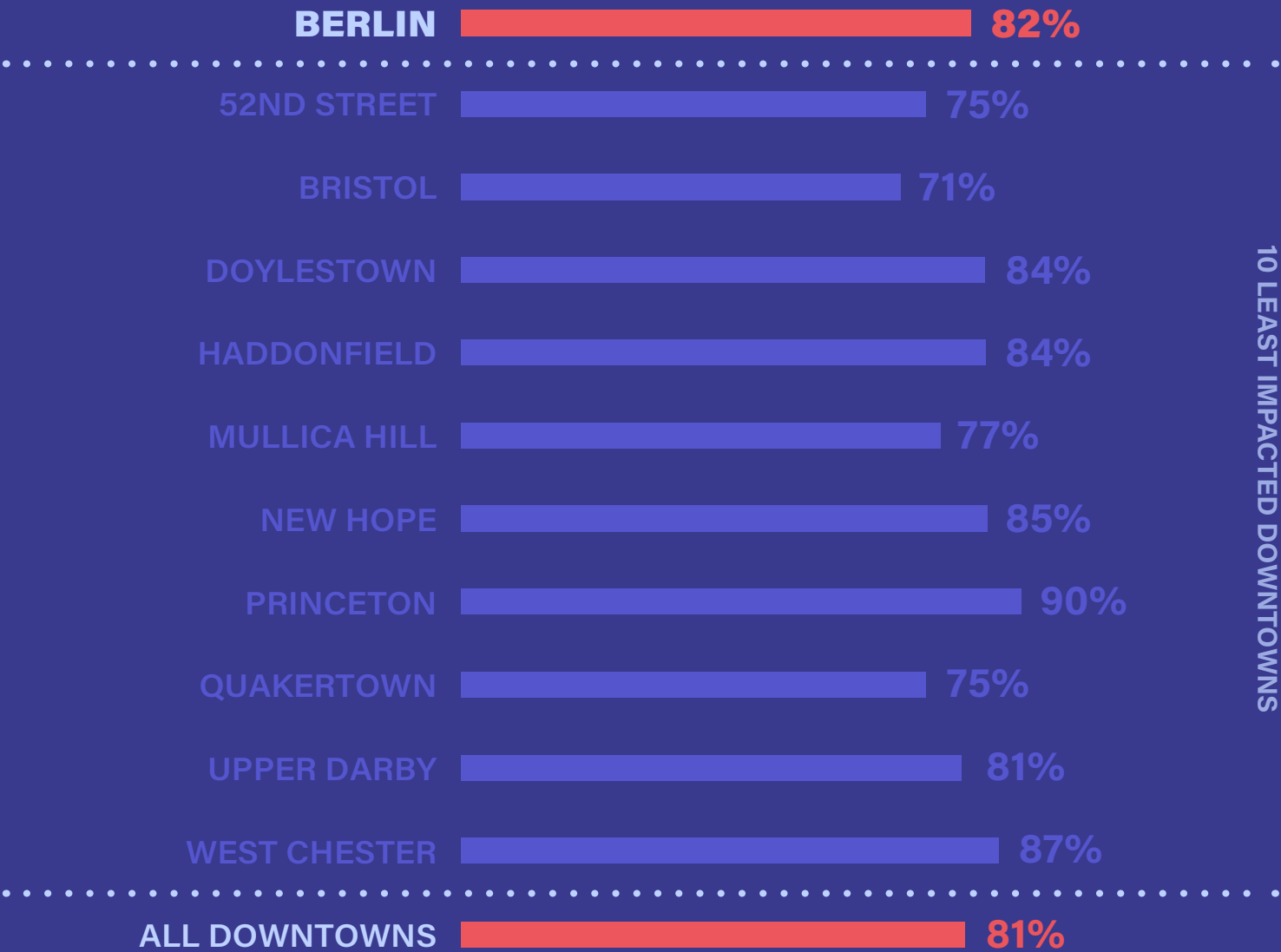
●dvrpc

Shutdown Impact

March 13 - June 15, 2020

During the economic shutdown, there were 318 visits to Berlin compared to 1,817 visits during the same period in 2019. This equated to an 82% 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%.

With 432 visits during the shutdown, compared to 1,268 during the same period in 2019, Gloucester City's downtown had the smallest reduction in visits at 66%.

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SOURCE: BUXTON CO.

BERLIN 82%
52ND STREET 75%
BRISTOL 71%
DOYLESTOWN 84%
HADDONFIELD 84%
MULLICA HILL 77%
NEW HOPE 85%
PRINCETON 90%
QUAKERTOWN 75%
UPPER DARBY 81%
WEST CHESTER 87%
ALL DOWNTOWNS 81%

10 LEAST IMPACTED DOWNTOWNS

Reopening Rebound

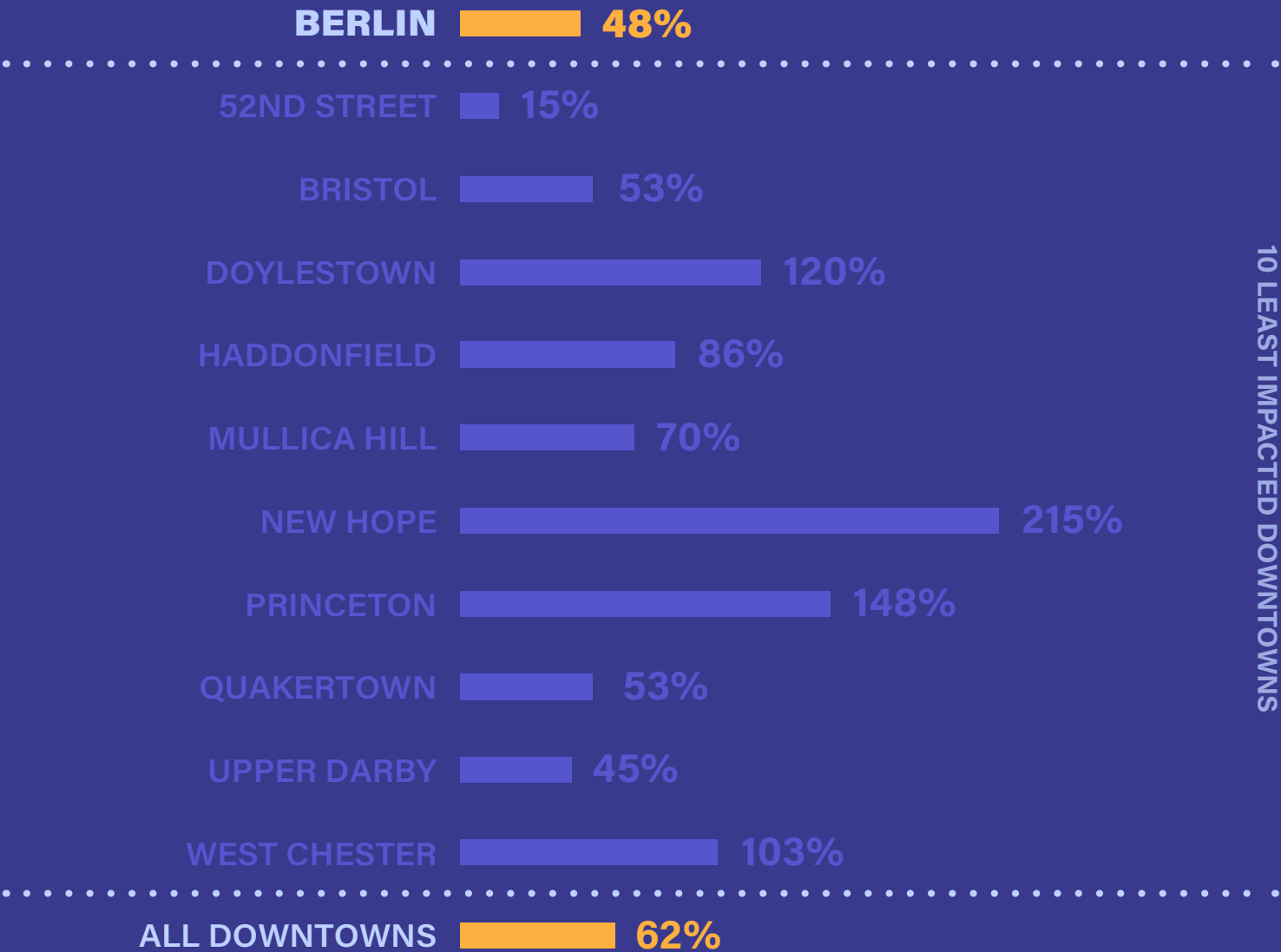## June 16 - October 31, 2020

Visits to Berlin's downtown increased by 48% during the reopening period to a total of 471 visits. This was 81% fewer than the 2,422 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.

10 LEAST IMPACTED DOWNTOWNS

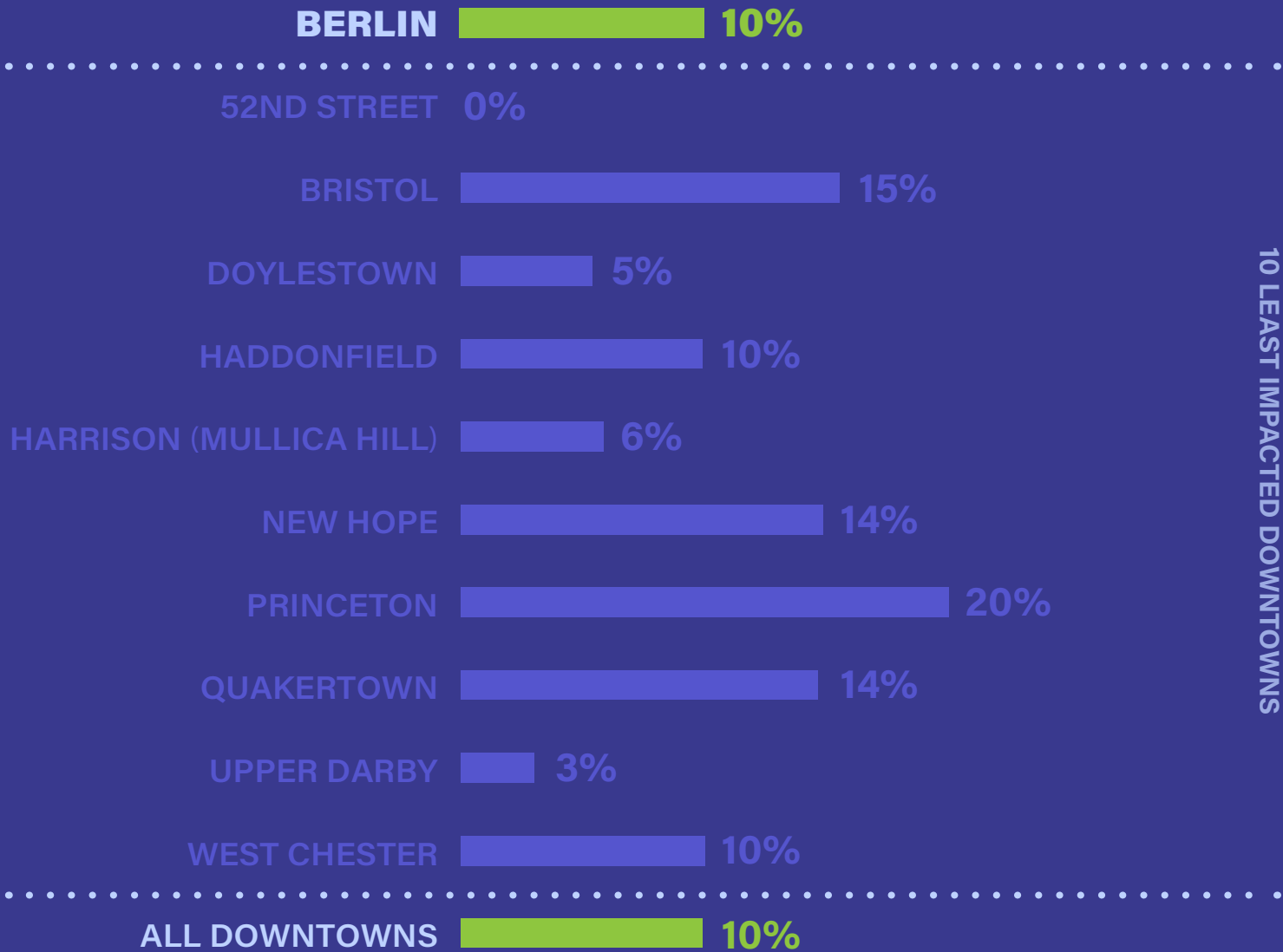|	
BERLIN	**48%**
52ND STREET	15%
BRISTOL	53%
DOYLESTOWN	120%
HADDONFIELD	86%
MULLICA HILL	70%
NEW HOPE	215%
PRINCETON	148%
QUAKERTOWN	53%
UPPER DARBY	45%
WEST CHESTER	103%
ALL DOWNTOWNS	**62%**

Trade Area Recovery
(Drive Time in Minutes)

Berlin's pre-pandemic trade area was a 30 minute drive time, which shrank by 27% during the shutdown to 22 minutes. During reopening, the trade area recovered by 10% to 25 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%.

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.

dvrpc

SOURCE: BUXTON CO.

BERLIN	**10%**
52ND STREET	0%
BRISTOL	15%
DOYLESTOWN	5%
HADDONFIELD	10%
HARRISON (MULLICA HILL)	6%
NEW HOPE	14%
PRINCETON	20%
QUAKERTOWN	14%
UPPER DARBY	3%
WEST CHESTER	10%
ALL DOWNTOWNS	**10%**

10 LEAST IMPACTED DOWNTOWNS