

# 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 | Audubon Borough (Merchant Street), 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.

Audubon's downtown lacks the walkable built environment and permanent residential population observed in less impacted downtowns, as well as the number of civic and office uses. Lastly, Merchant Street's retail mix is overly reliant upon *Neighborhood Goods & Services* (NGS) retail. Therefore, the downtown received a Diversity Score of 62.

The downtown's lack of diversity most likely exacerbated the pandemic's impact, specifically the reliance on NGS retailers, and this is reflected in a relatively high Pandemic Impact Score of 58.

62

## Diversity Score

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

58

## Pandemic Impact Score

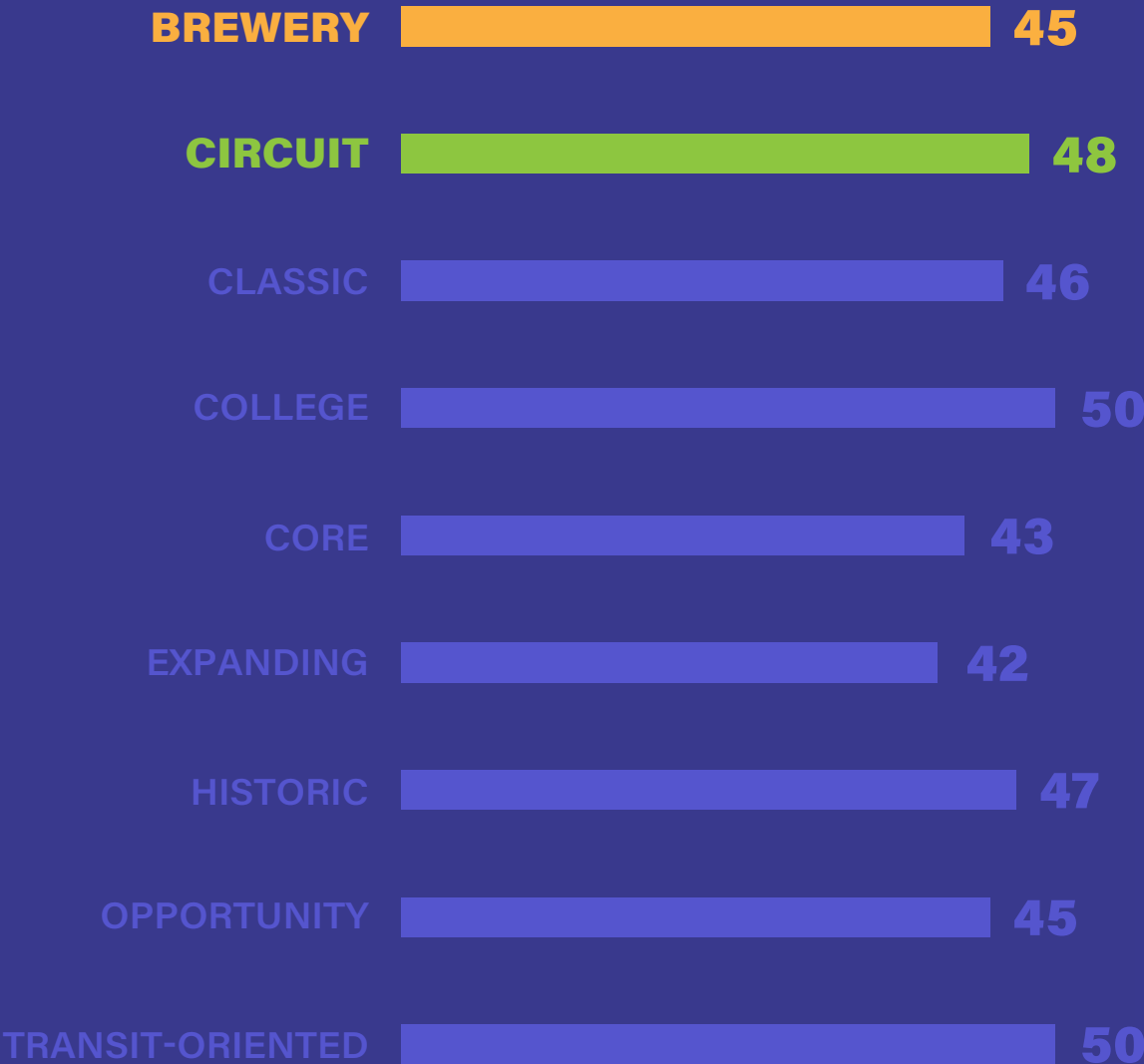
*Visits and trade area pre-pandemic, and during the shut-down and reopening periods*

# 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. Merchant Street is considered to be two typologies: *Brewery* and *Circuit* (the trail has not yet been built). Downtowns considered to be two typologies had an average Pandemic Impact Score of 52.

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



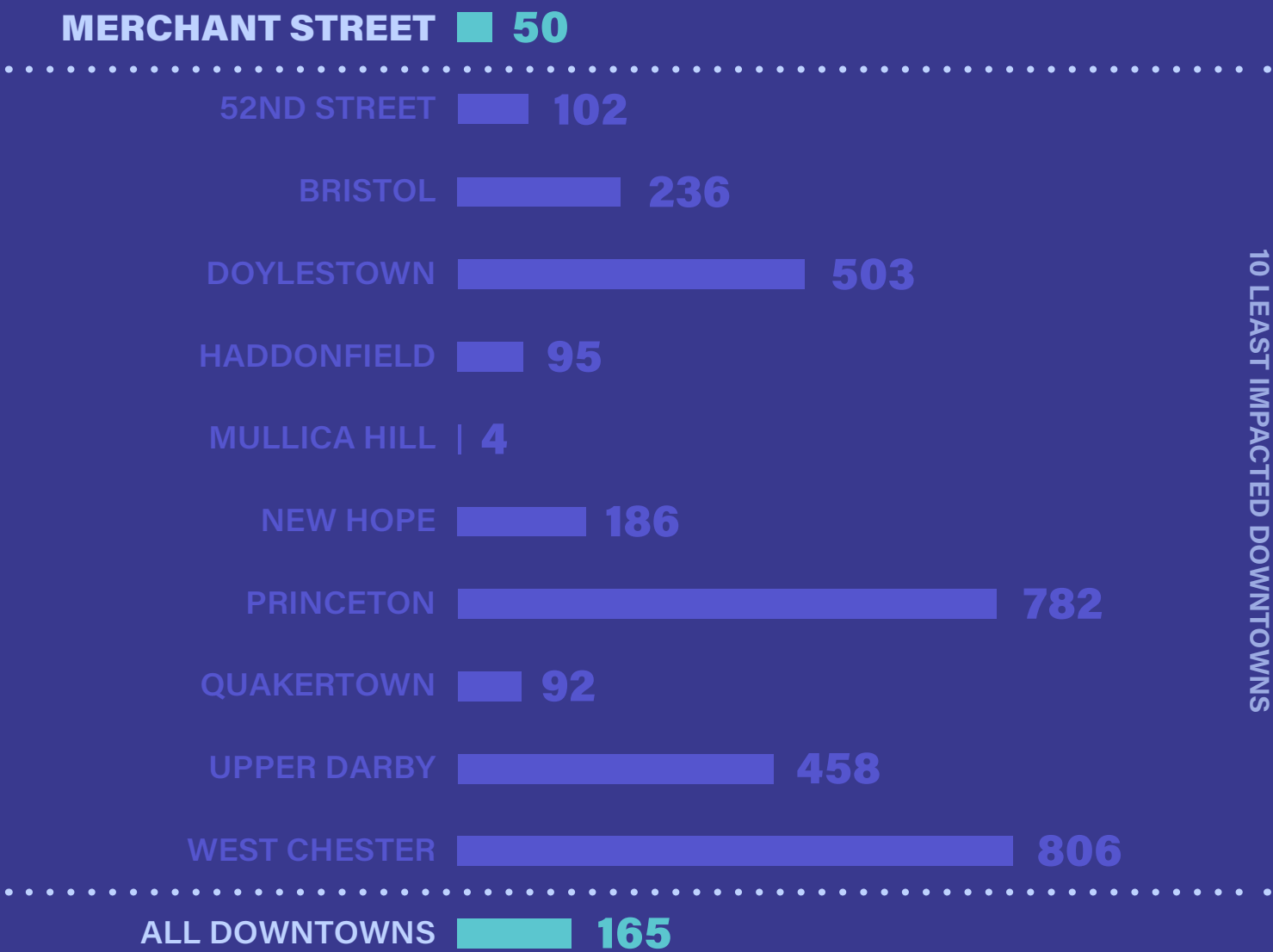
# Downtown Population

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, Merchant Street’s downtown population was estimated to be 50, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.



SOURCE: BUXTON CO.



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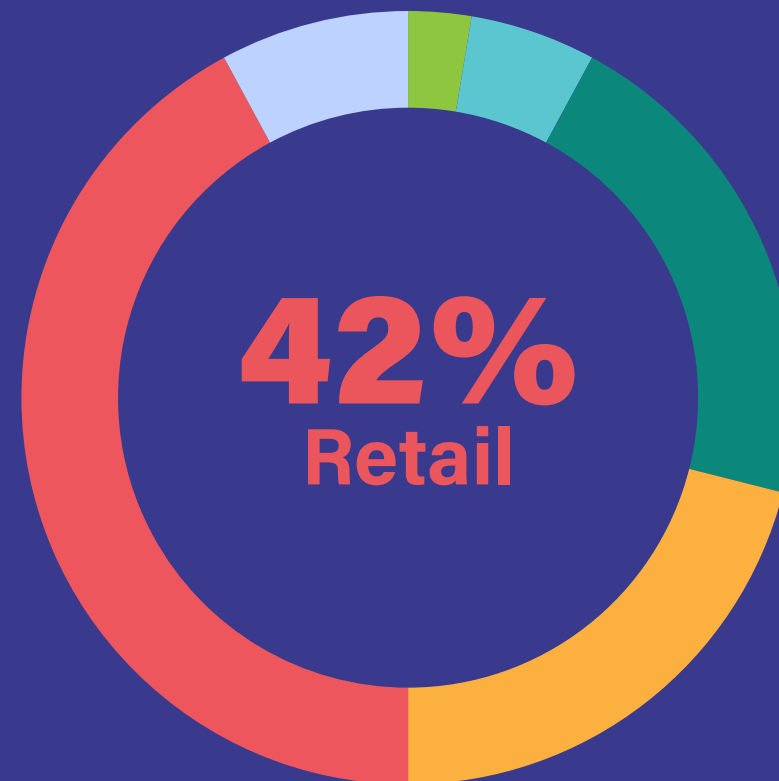
## Mix of Uses

Retail accounts for 42% of the uses along Merchant Street, 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 similar share of retail uses at 30%, while *General Merchandise, Apparel, Furnishings & Other (GAFO)* makes up a much larger 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 30% of all retail, which is a significantly smaller share than along Merchant Street.

Additionally, as the vacancy rate increased, so did the Pandemic Impact Score.



3%  
Civic

5%  
Cultural

0%  
Institutional

21%  
Office

21%  
Residential

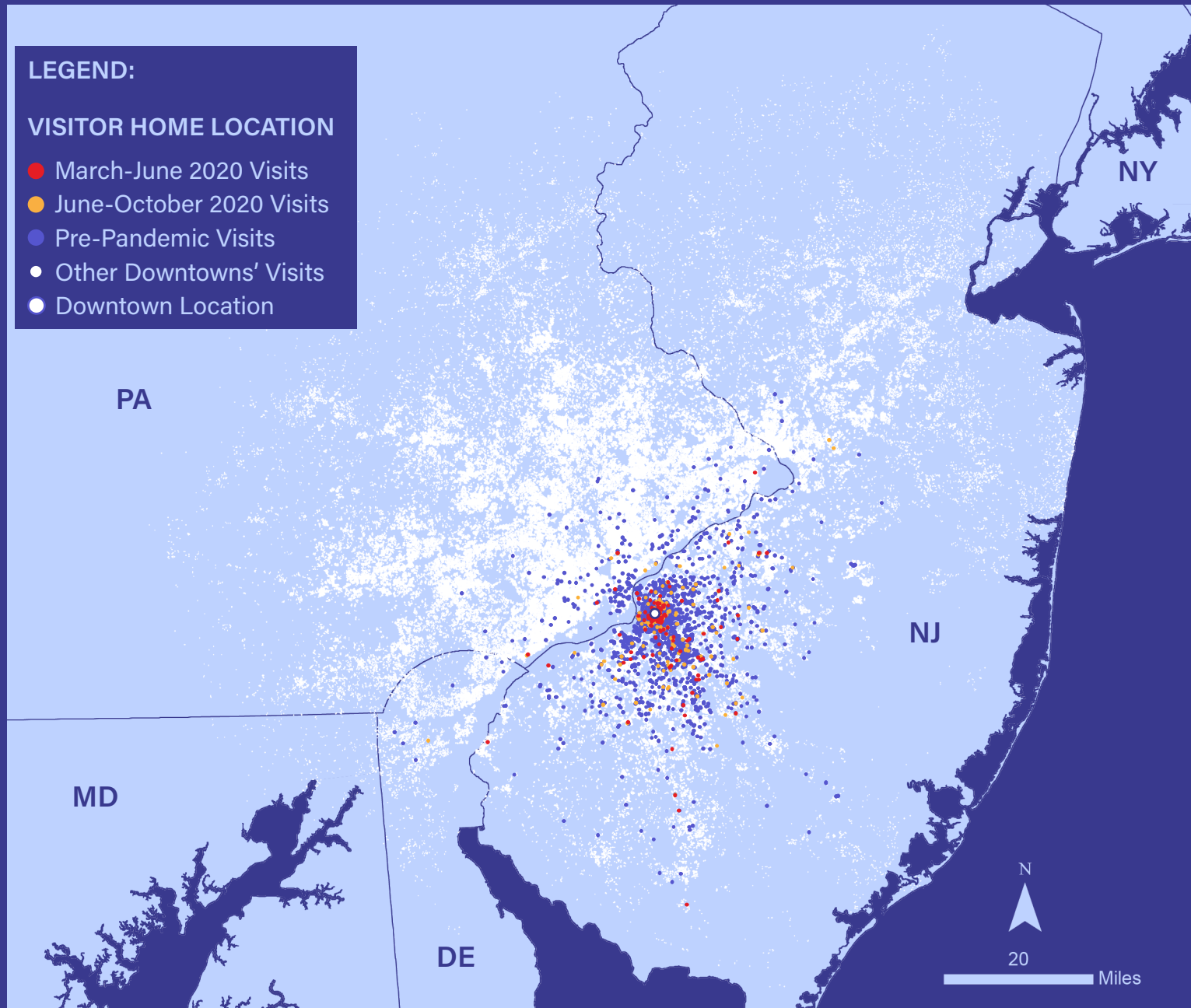
8%  
Vacancy

### Retail Mix:

31%  
Food & Beverage (FB)

19%  
General Merchandise,  
Apparel, Furnishings,  
& Other (GAFO)

50%  
Neighborhood Goods  
& Services (NGS)



## 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 Merchant Street were as follows:

### ● Pre-Pandemic

Delaware: 0.4%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 6.5%
New Jersey: 93.1%	

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

Delaware: 0.0%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 3.6%
New Jersey: 96.4%	

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

Delaware: 0.6%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 3.4%
New Jersey: 96.0%	



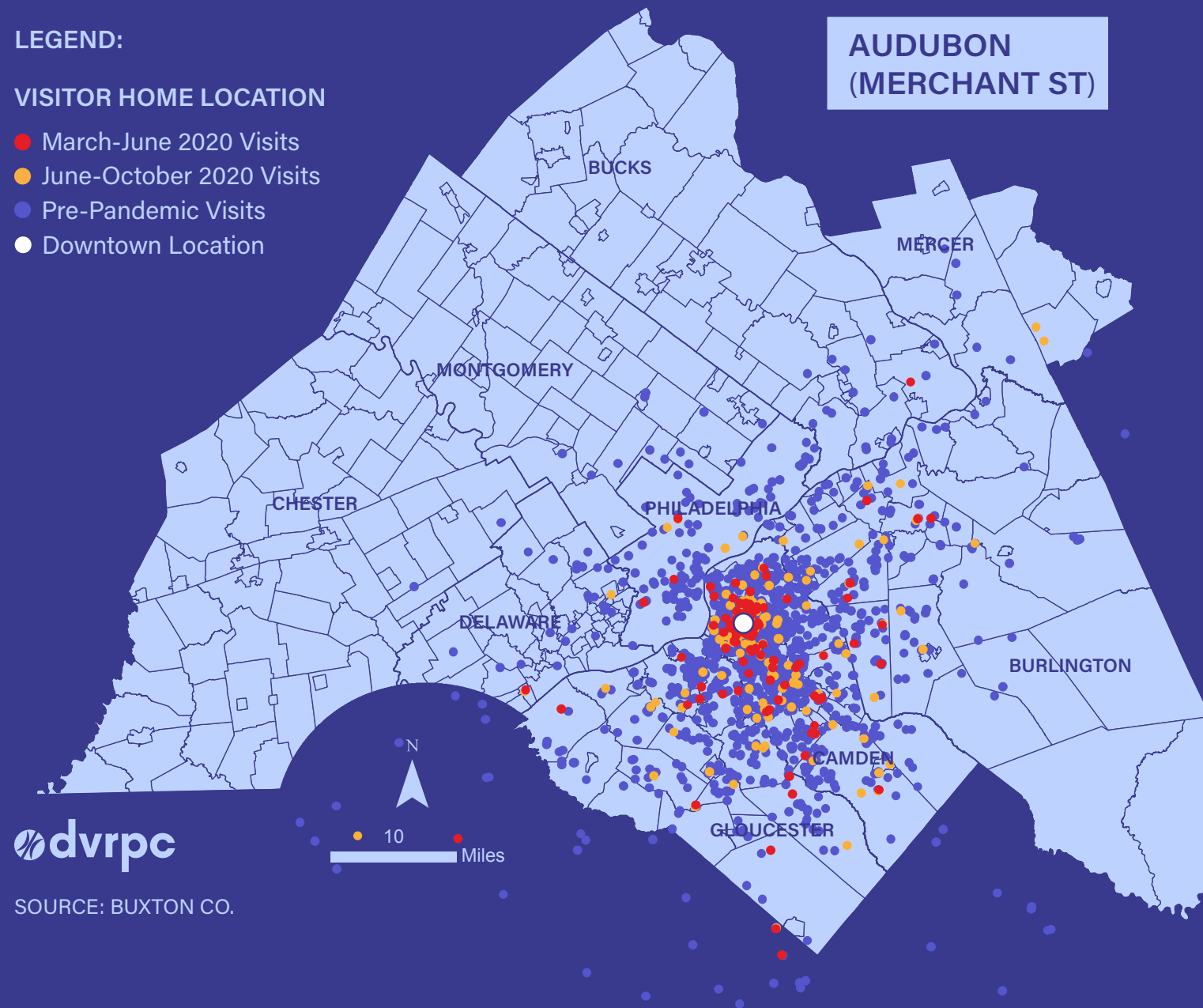
SOURCE: BUXTON CO.



LEGEND:

VISITOR HOME LOCATION

- March-June 2020 Visits
- June-October 2020 Visits
- Pre-Pandemic Visits
- Downtown Location



## Visits to Downtown

Prior to the pandemic, people visiting Merchant Street lived primarily in southern New Jersey, with some visitors coming from just across the Delaware River in Pennsylvania. However, during the pandemic, most visits came from surrounding Camden County.

Between August 2018 and March 2020, 2,690 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 156 visits to Merchant Street, and during the reopening period (June 16 - October 31) there were 204 visits.

# Shutdown Impact

March 13 - June 15, 2020

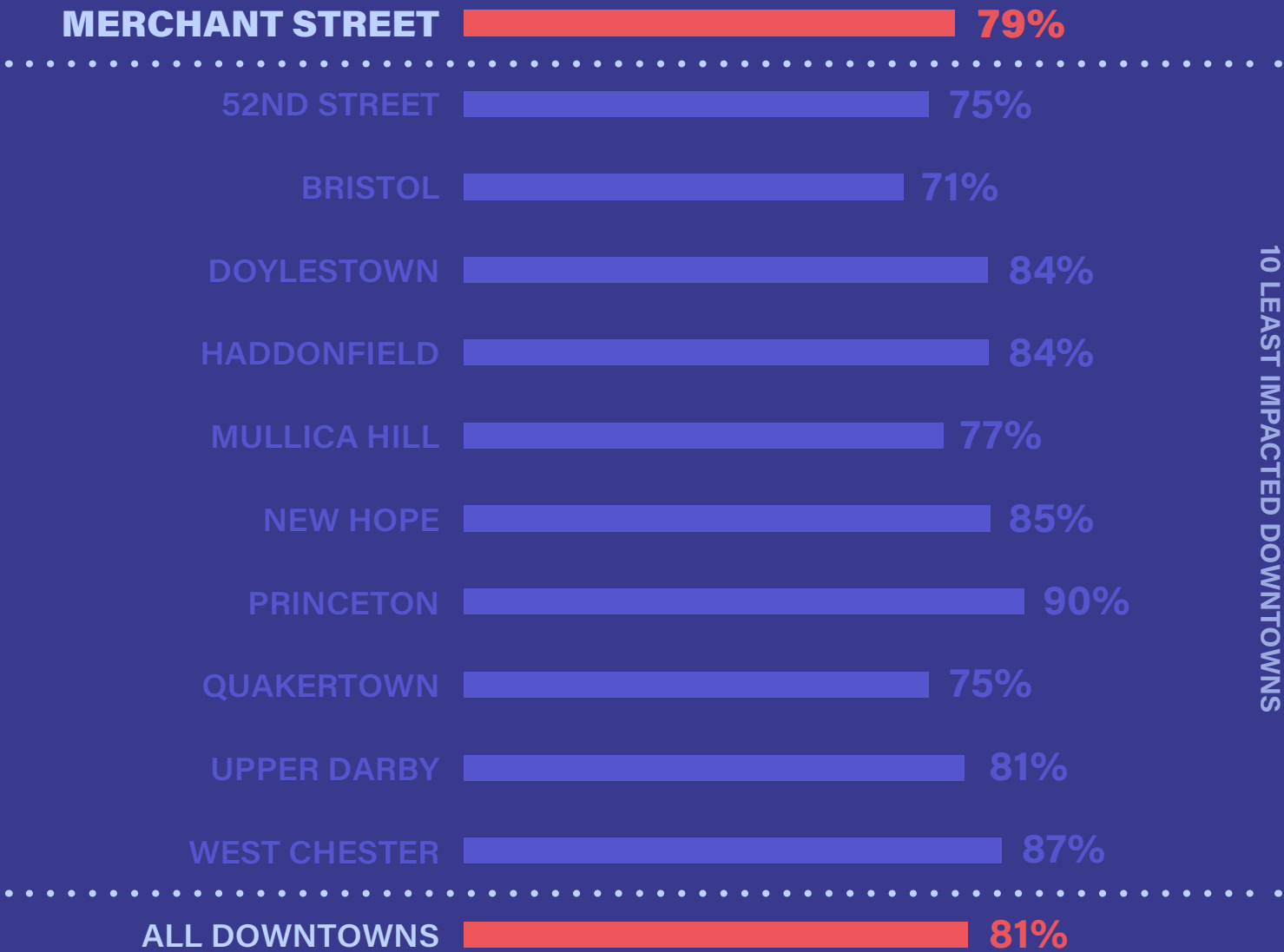
During the economic shutdown, there were 156 visits to Merchant Street compared to 739 visits during the same period in 2019. This equated to a 79% reduction.

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%.



SOURCE: BUXTON CO.



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# Reopening Rebound

June 16 - October 31, 2020

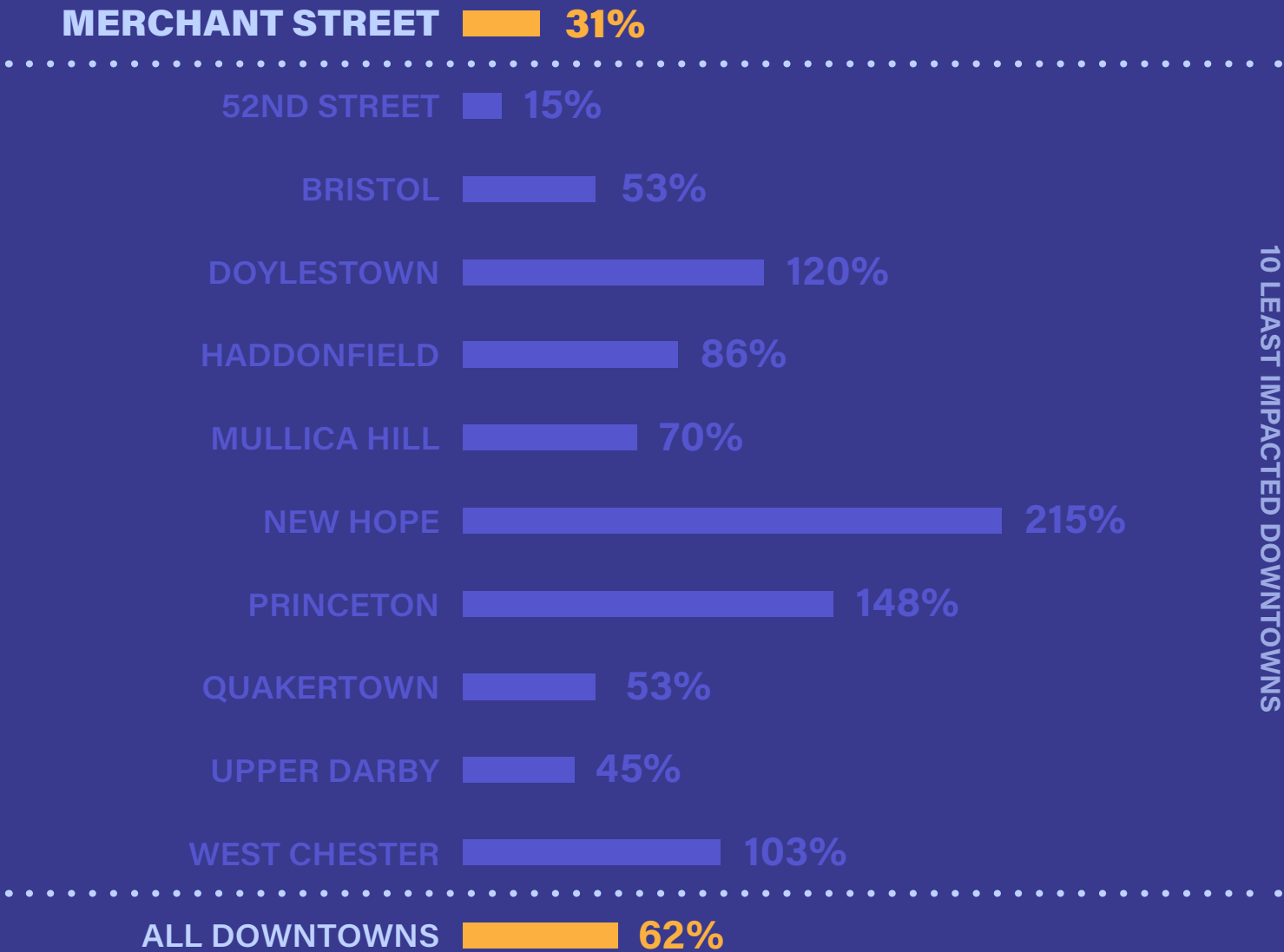
Visits to Merchant Street increased by 31% during the reopening period to a total of 204 visits. This was 78% fewer than the 908 visits that occurred during the same period in 2019.

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.



SOURCE: BUXTON CO.



# Trade Area Recovery

(Drive Time in Minutes)

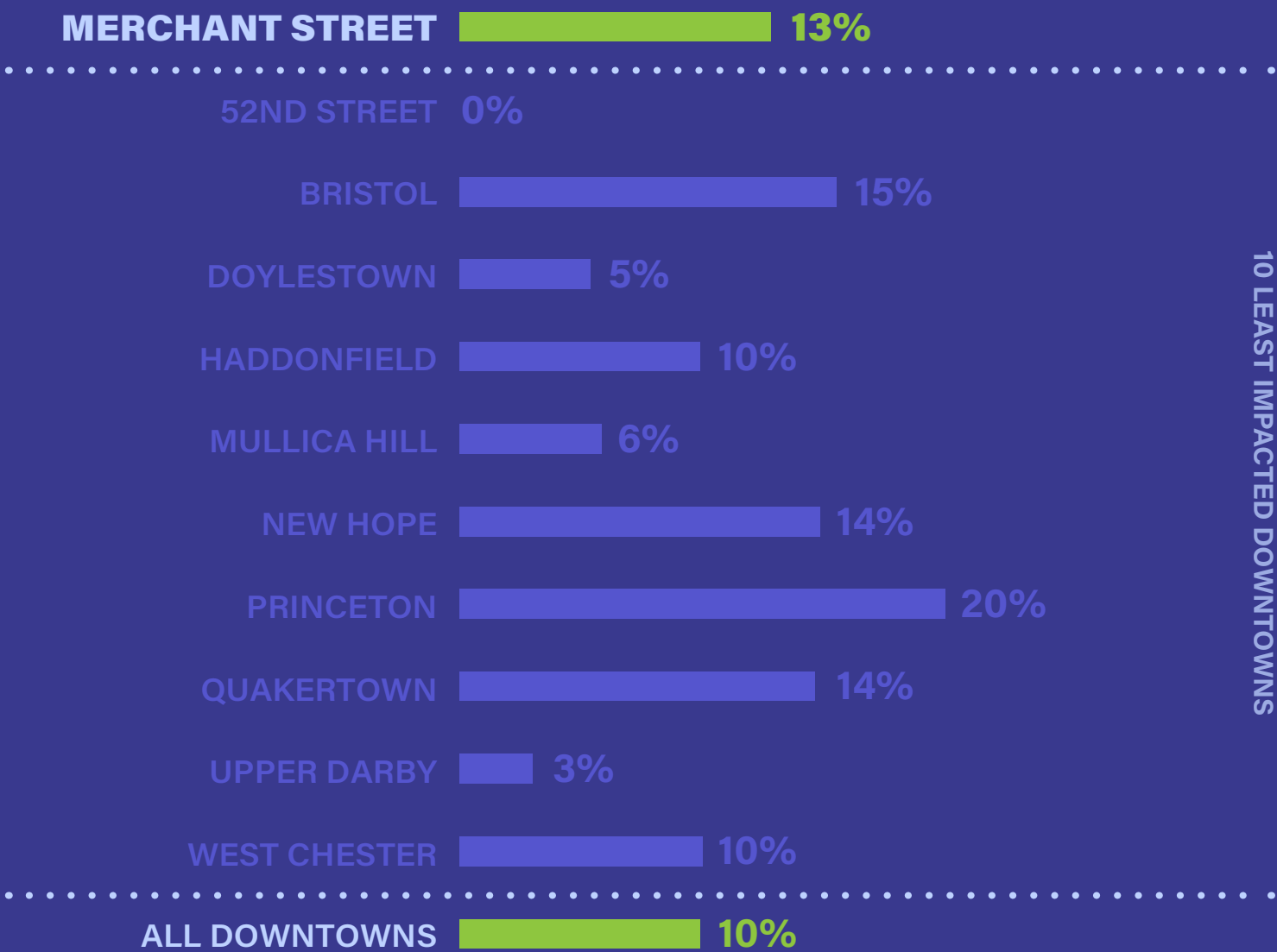
Merchant Street’s pre-pandemic trade area was a 24 minute drive time, which shrank by 13% during the shutdown to 21 minutes, and recovered to its pre-pandemic level of 24 minutes during the reopening period.

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.



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