

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 | Quakertown 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.

Quakerown has a relatively walkable downtown with a smaller than average residential population. Its mix of civic, cultural, office, residential, and retail uses is average for the region, but it has a healthier mix of chain and retail stores than the average downtown. These characteristics are reflected in Quakertown's slightly better than average Diversity Score of 48.

Despite being average with regards to diversity, Quakertown was one of the least impacted downtowns in the region, earning a Pandemic Impact Score of 35. This may be partially explained by the relative lack of competition from other nearby downtowns, and the fact that retail makes up a smaller share of uses than average.

48

Diversity Score

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

35

Pandemic Impact Score

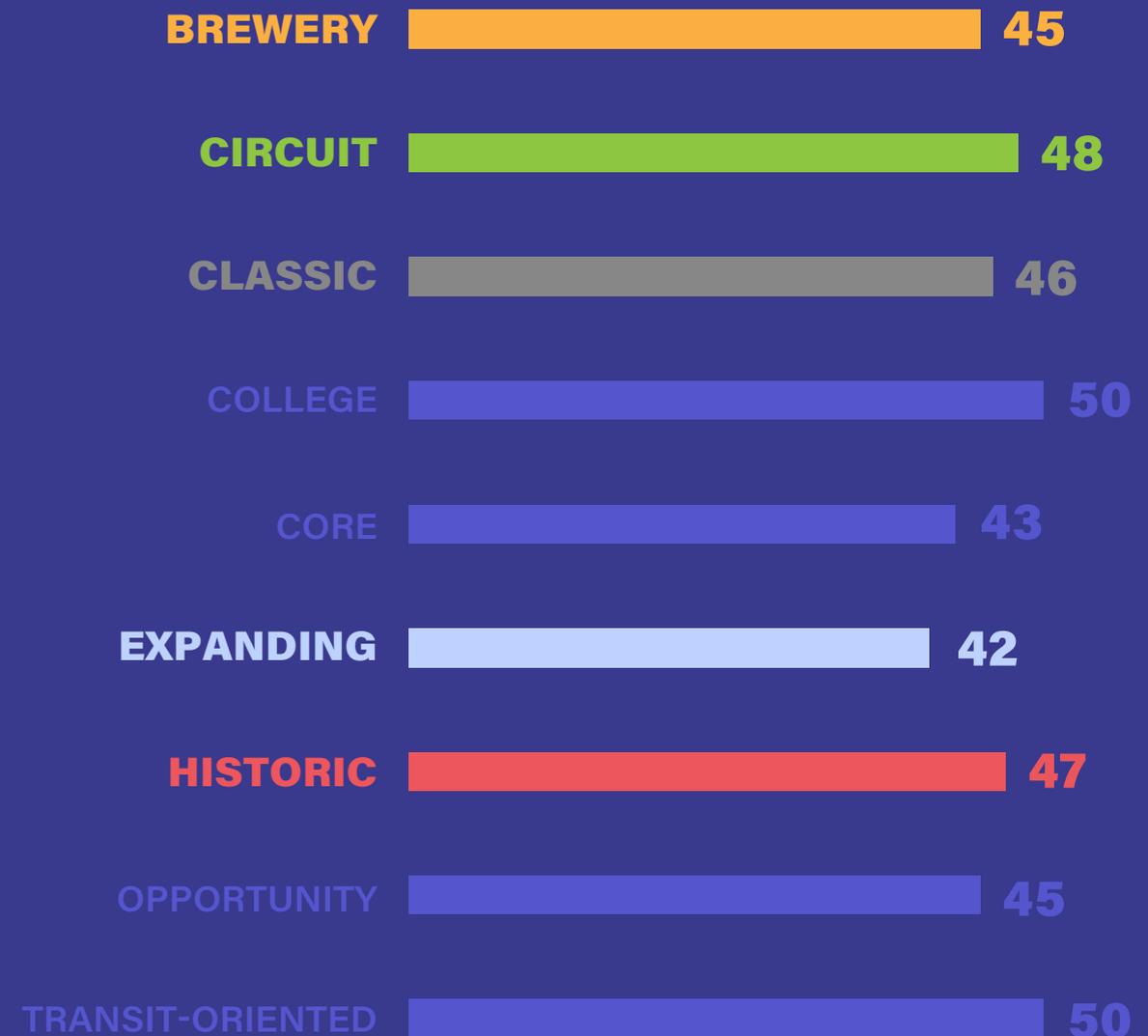
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

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. Quakertown is considered to be five typologies: *Brewery*, *Circuit* (although the trail is not existing), *Classic*, *Expanding* (due to potential for expansion), and *Historic*. There were 12 downtowns in total that were considered to be five typologies with an average Pandemic Impact Score of 42.

It is important to note that Quakertown has the potential to expand by redeveloping the Quakertown Village Shopping Center. The average score for potentially *Expanding* downtowns was 46.



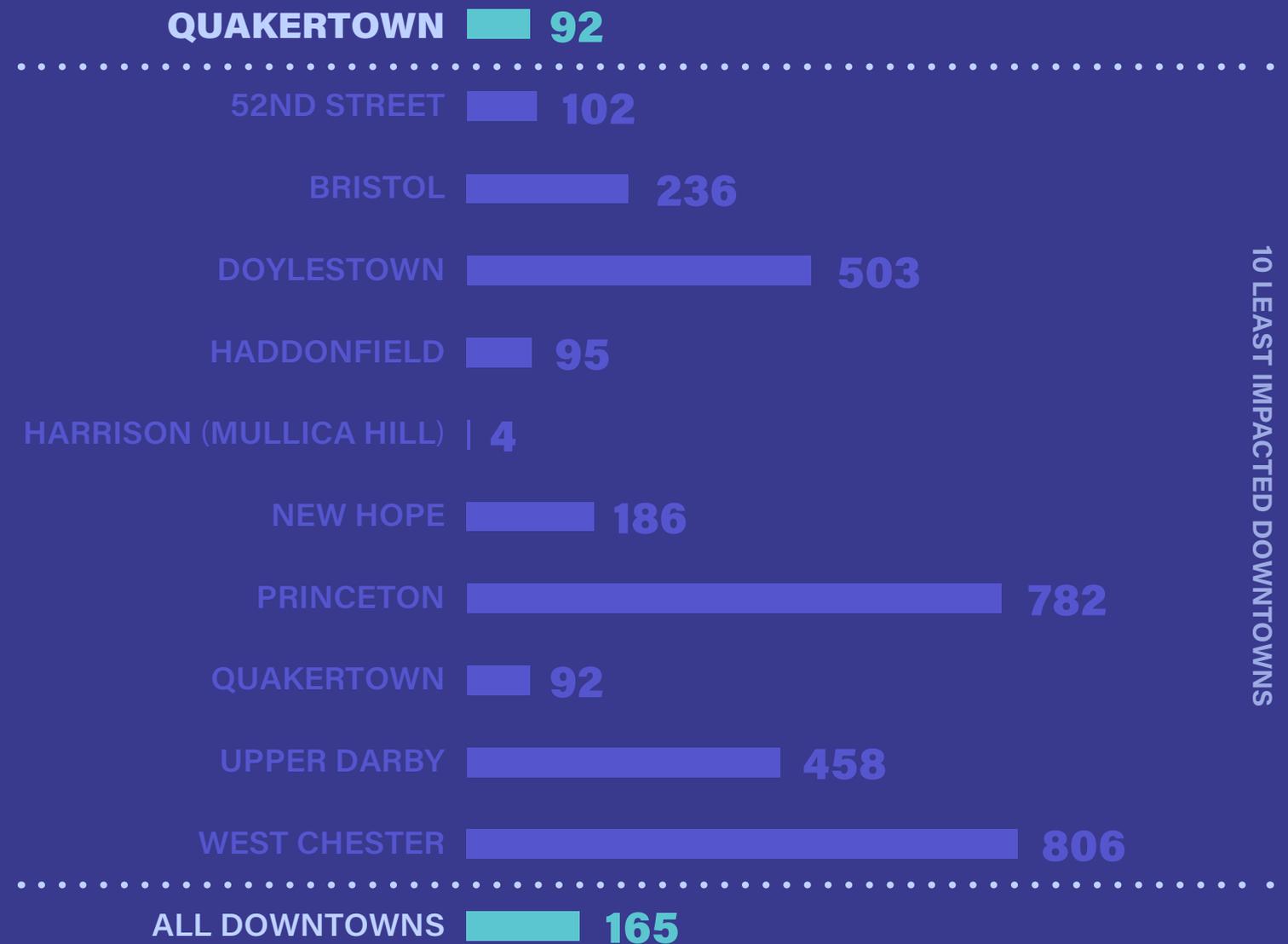
Downtown Population

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, Quakertown's downtown population was estimated to be 92, compared to an average of 165 for all downtowns and 326 for the least impacted downtowns.



SOURCE: BUXTON CO.



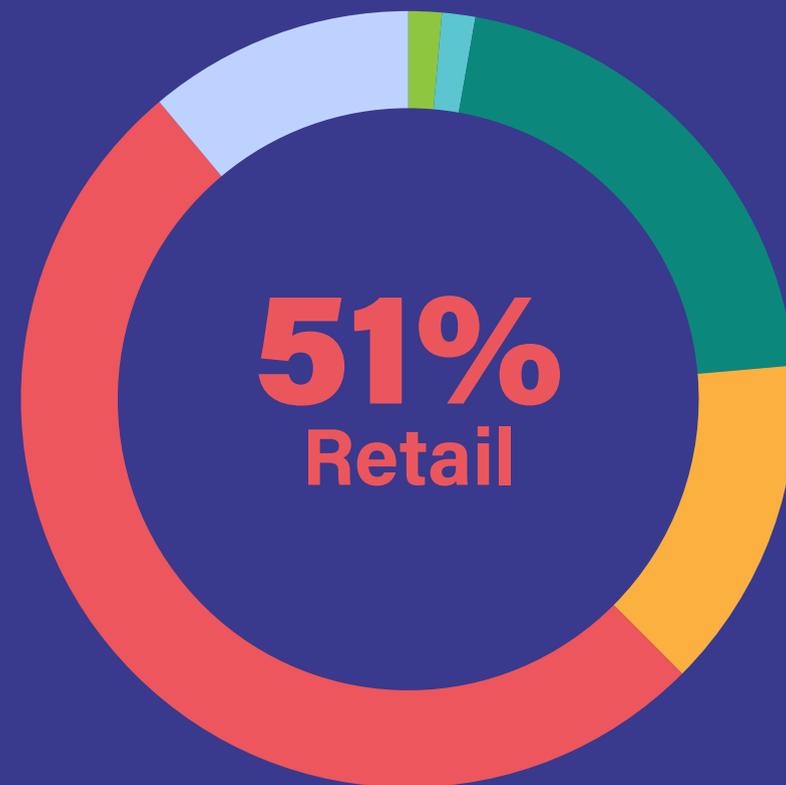
Mix of Uses

Retail accounts for 51% of the uses in Quakertown's downtown, which is lower than the averages of 57% for all downtowns and 60% for the least impacted downtowns. This may partially explain why Quakertown was less impacted by the pandemic given that the retail industry was hit particularly hard.

In both Quakertown and the other least impacted downtowns, *Food & Beverage (FB)* made up 30% of retail. However, *General Merchandise, Apparel, Furnishings & Other (GAFO)* was slightly higher in the least impacted downtowns at 38% of all retail.

Conversely, in the least impacted downtowns, *Neighborhood Goods & Services (NGS)* retailers made up 30% of all retail, which is a smaller share than in Quakertown.

In general, the greater the share of NGS retail or the higher the vacancy rate, the higher the Pandemic Impact Score.

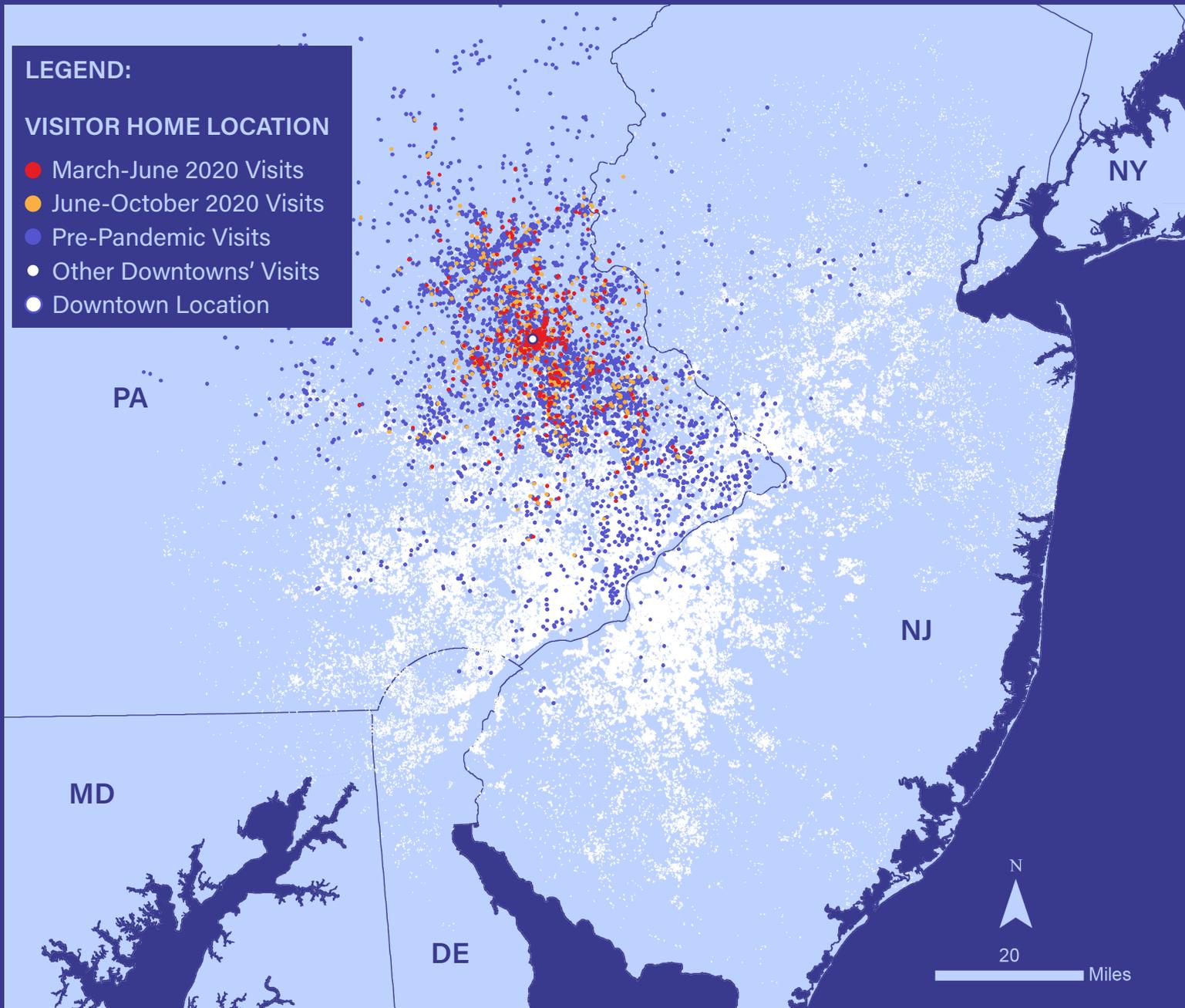


Retail Mix:

30%
Food & Beverage (FB)

35%
General Merchandise,
Apparel, Furnishings,
& Other (GAFO)

35%
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 Quakertown were as follows:

- **Pre-Pandemic**
 - Delaware: 0.0%
 - Maryland: 0.0%
 - New Jersey: 1.8%
 - New York: 0.0%
 - Pennsylvania: 98.1%
- **Shutdown | March 13 - June 15, 2020**
 - Delaware: 0.0%
 - Maryland: 0.0%
 - New Jersey: 0.4%
 - New York: 0.0%
 - Pennsylvania: 99.6%
- **Reopening | June 16 - October 31, 2020**
 - Delaware: 0.0%
 - Maryland: 0.0%
 - New Jersey: 1.0%
 - New York: 0.0%
 - Pennsylvania: 99.0%

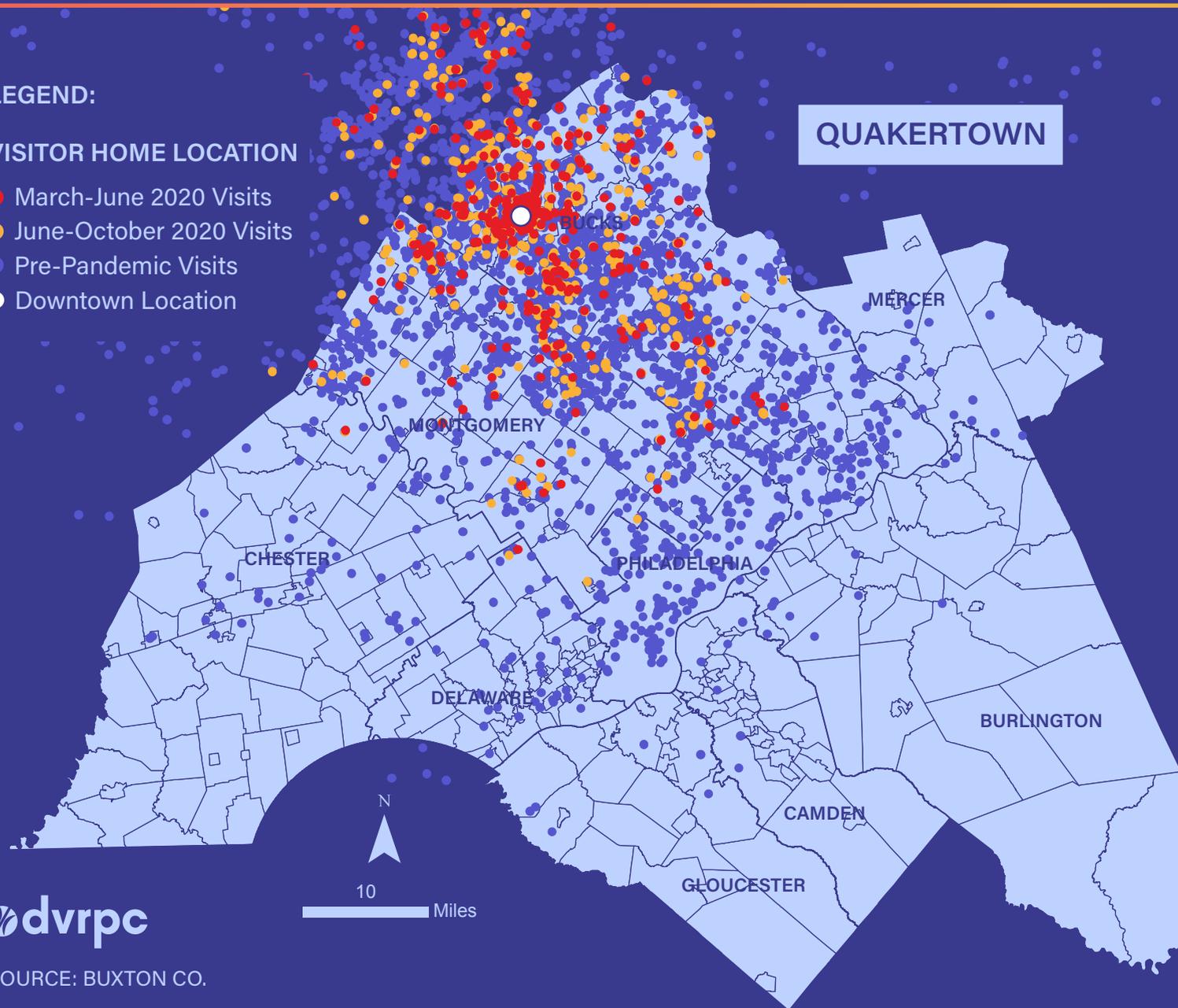


SOURCE: BUXTON CO.

LEGEND:

VISITOR HOME LOCATION

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



SOURCE: BUXTON CO.

Visits to Downtown

Visitors to Quakertown primarily came from within Bucks County, as well as portions of Montgomery County and from beyond the region.

Between August 2018 and March 2020, 7,750 people visited the downtown, which is slightly lower than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 559 visits, and during the reopening period (June 16 - October 31) there were 855 visits to Quakertown's downtown.

Shutdown Impact

March 13 - June 15, 2020

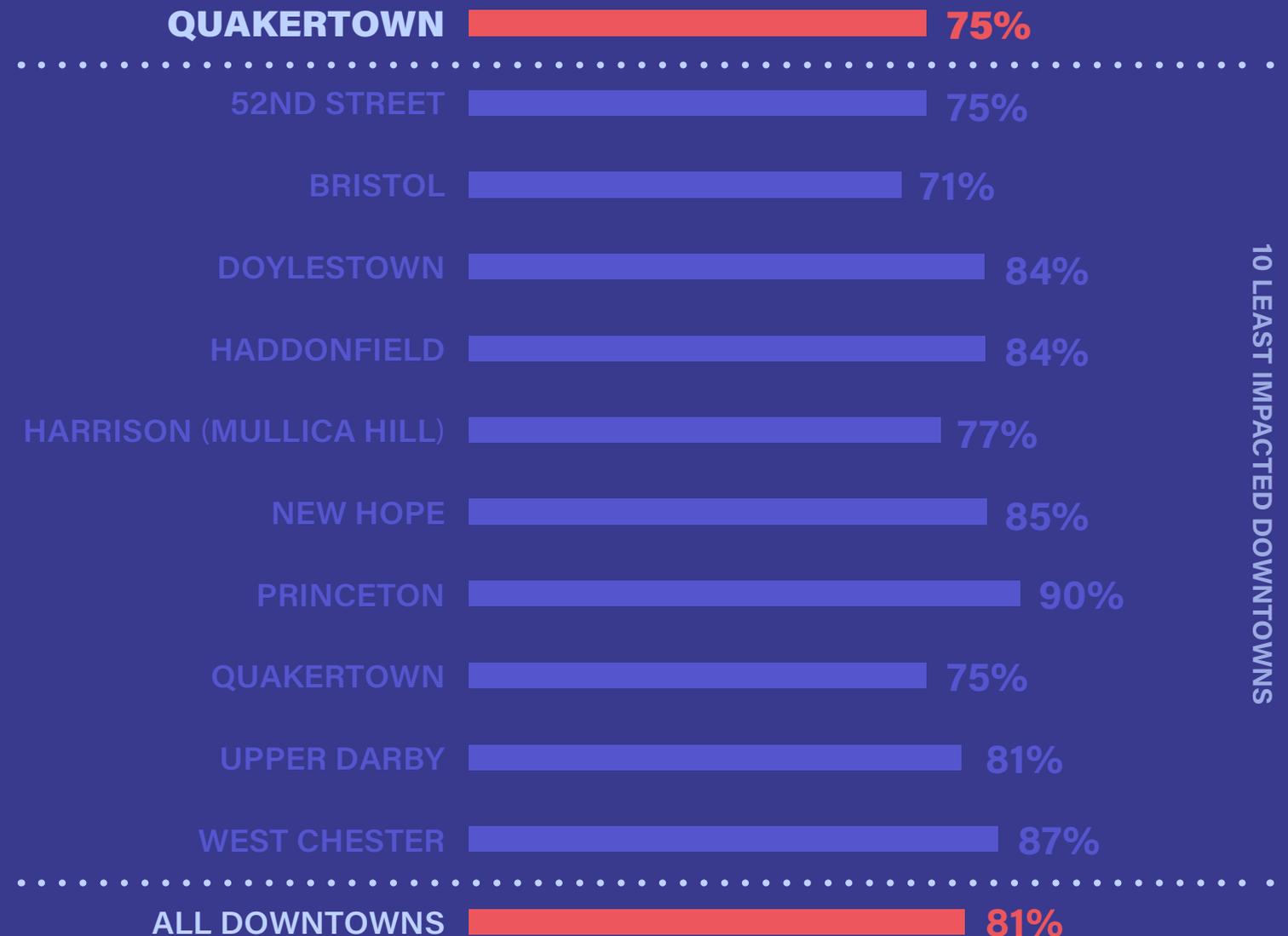
During the economic shutdown, there were 559 visits to Quakertown's downtown compared to 2,218 visits during the same period in 2019. This equated to a 75% reduction, which was one of the smallest reductions observed.

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

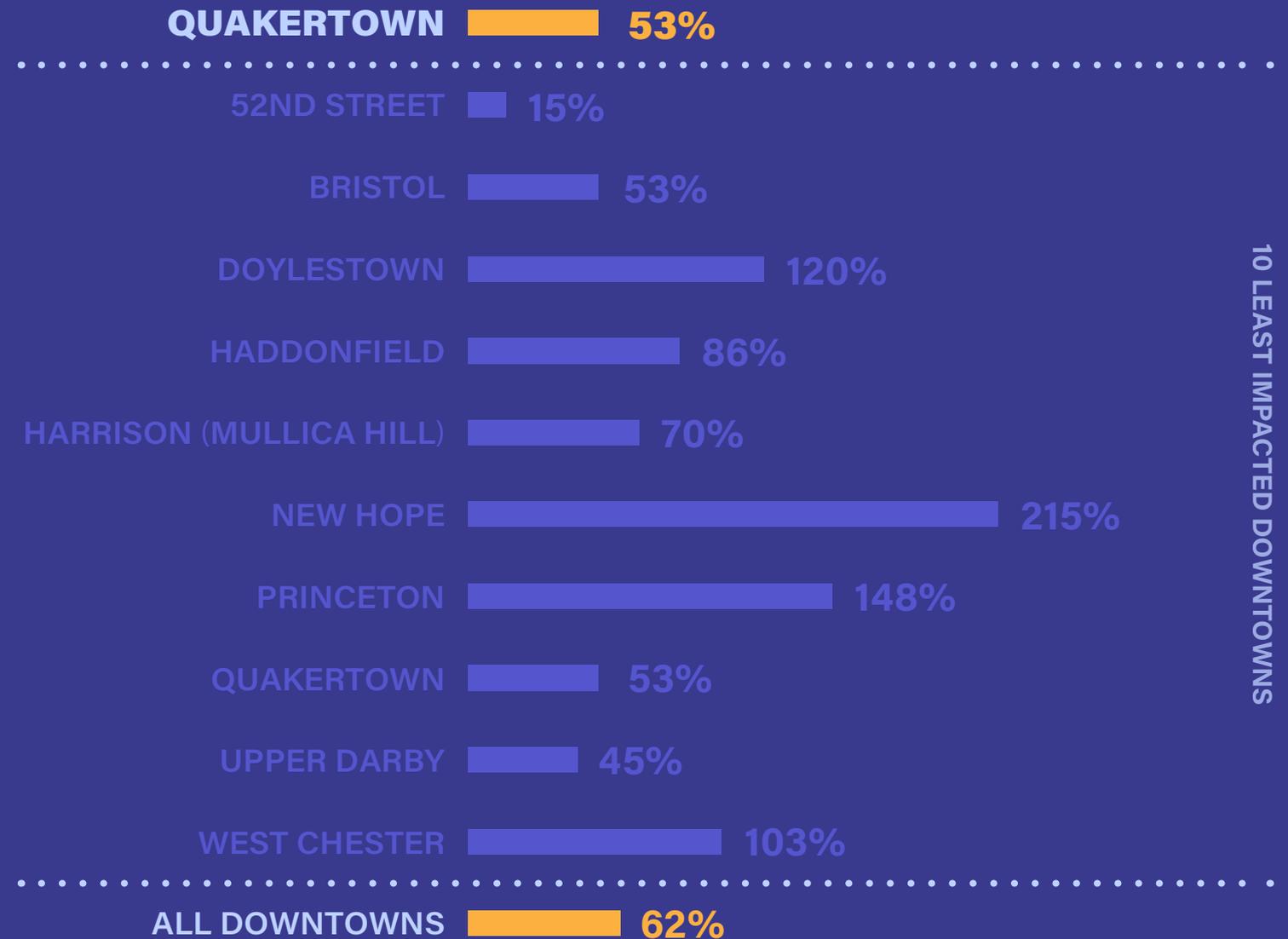
Visits to Quakertown's downtown increased by 53% during the reopening period to a total of 855 visits. This was 70% fewer than the 2,848 visits that occurred during the same period in 2019.

On average, visits increased by 62% to approximately 700 visits for all downtowns, and by 91% to approximately 1,700 visits for the least impacted downtowns.

New Hope observed the greatest increase at 215%, with more than 2,800 visits during that time.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS

Trade Area Recovery

(Drive Time in Minutes)

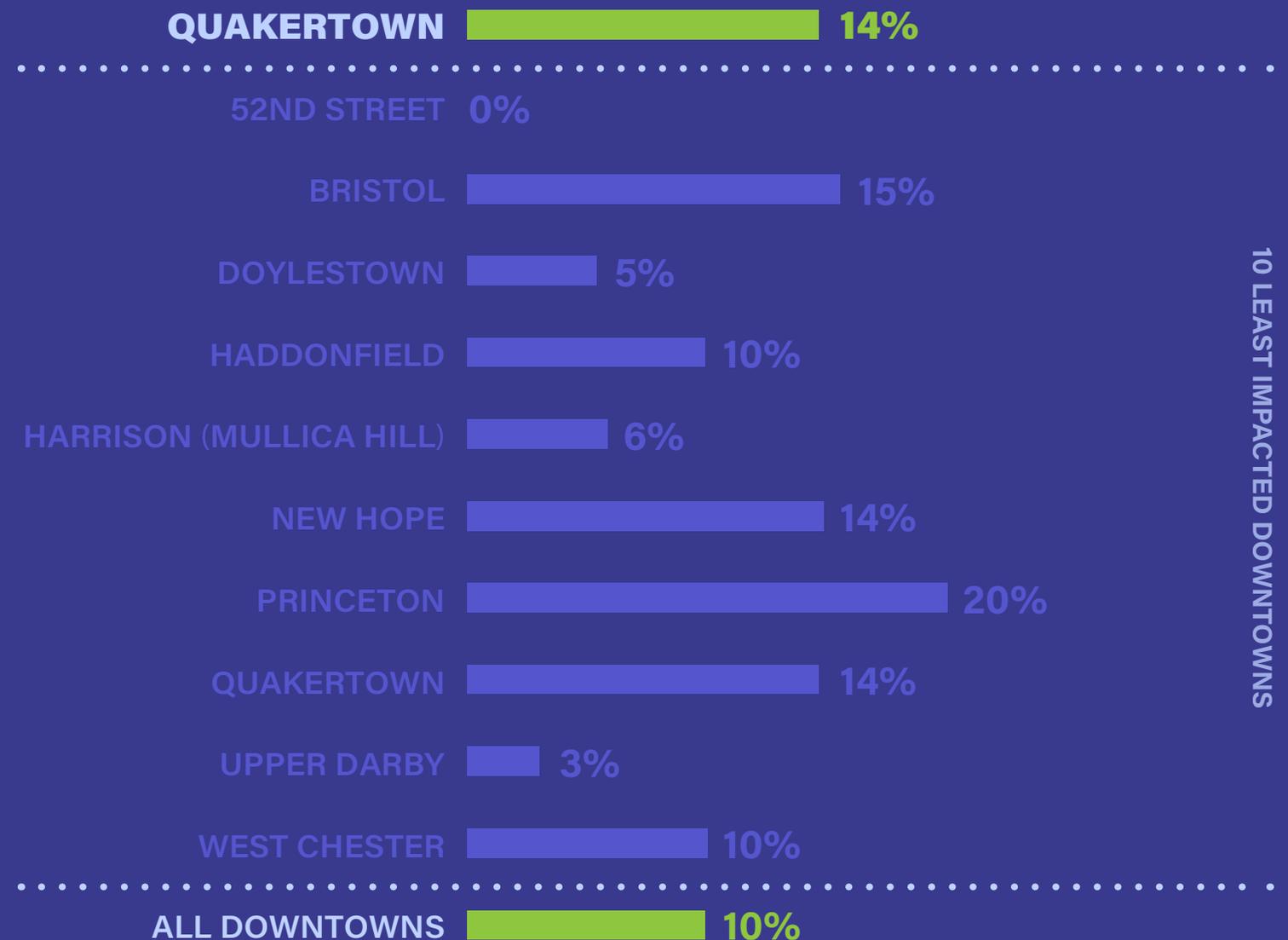
Quakertown's pre-pandemic trade area was a 35 minute drive time, which shrank by 29% during the shutdown to 25 minutes. During reopening, the trade area recovered by 14% to 30 minutes.

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.



10 LEAST IMPACTED DOWNTOWNS