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.
### Characteristics that reduced the pandemic’s impact:

Downtowns with the following characteristics were generally less impacted by the pandemic than their peers.

<table>
<thead>
<tr>
<th>Development</th>
<th>Diversity</th>
<th>People</th>
<th>Trails</th>
<th>Walkability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent mixed-use, residential, and retail developments within the downtowns increased diversity as well as resiliency.</td>
<td>Downtowns with diverse built environments, demographics, local economies, mix of uses, and transportation options, were less impacted.</td>
<td>Diverse and permanent residential populations located within the downtowns provided retailers with customers even as people stayed close to home.</td>
<td>Existing Circuit Trails connected downtowns with open space and enabled alternative modes of transportation.</td>
<td>Historic downtowns with more pedestrian-friendly built environments had greater resiliency.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cars</strong></td>
<td>Auto-oriented downtowns with lower Walk Scores and more cars per household were more impacted by the pandemic.</td>
</tr>
<tr>
<td><strong>Colleges</strong></td>
<td>Downtowns that are overly-reliant on these anchor institutions were less resilient during the pandemic.</td>
</tr>
<tr>
<td><strong>Goods &amp; Services</strong></td>
<td>As the share of Neighborhood Goods &amp; Services (NGS) retailers increased in a downtown, so did the pandemic’s impact.</td>
</tr>
<tr>
<td><strong>Transit</strong></td>
<td>The pandemic significantly reduced transit ridership, and this impact had a ripple effect in transit-oriented downtowns.</td>
</tr>
<tr>
<td><strong>Vacancy</strong></td>
<td>The pandemic had a greater impact as downtown vacancy rates increased.</td>
</tr>
</tbody>
</table>
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.

Kennett Square's walkable downtown has a diverse residential population, and a healthy mix of uses and types of retail. These qualities are why the downtown received a diversity score of 43, which indicates that the downtown is relatively diverse when compared to the region.

Despite being slightly more diverse than the average downtown, the pandemic had a typical impact on Kennett Square with the downtown receiving a Pandemic Impact Score of 48. These findings suggest that there are ways in which to improve the downtown's diversity to reinforce what is already a relatively resilient downtown.
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. Kennett Square is considered to be three typologies: Brewery, Classic, and Historic.

Downtowns that are considered to be three typologies had an average Pandemic Impact Score of 53. The most typologies for any one downtown was six, with an average Pandemic Impact Score of 42.
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, Kennett Square’s downtown population was estimated to be 196, which was slightly more than the average of 165 for all downtowns and slightly less than half of the average of 326 for the least impacted downtowns.

Kennett Square’s downtown population is one of the most diverse with regards to demographics, with the White, Black, and Hispanic populations accounting for 67%, 9%, and 42% respectively.

SOURCE: BUXTON CO.
Retail accounts for 60% of the uses in Kennett Square's downtown, which is equal to the average for the least impacted downtowns and slightly higher than the average of 57% for all downtowns.

In the least impacted downtowns, Food & Beverage (FB) retailers also accounted for 30% retail on average, while General Merchandise, Apparel, Furnishings & Other (GAFO) made up a significantly smaller share of retail on average at 38%. On average as the share of each of these retail types increased, the Pandemic Impact Score decreased.

Conversely, in the least impacted downtowns, Neighborhood Goods & Services (NGS) retailers made up a larger share on average at 30%. This most likely helped mitigate the pandemic’s impact in Kennett Square given that in general as the share of NGS retailers 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 Kennett Square were as follows:

- **Pre-Pandemic**
  - Delaware: 25.1%
  - Maryland: 2.5%
  - New Jersey: 0.7%
  - New York: 0.0%
  - Pennsylvania: 71.7%

- **Shutdown | March 13 - June 15, 2020**
  - Delaware: 13.3%
  - Maryland: 2.0%
  - New Jersey: 0.4%
  - New York: 0.0%
  - Pennsylvania: 84.3%

- **Reopening | June 16 - October 31, 2020**
  - Delaware: 16.5%
  - Maryland: 2.0%
  - New Jersey: 0.7%
  - New York: 0.0%
  - Pennsylvania: 80.7%
Pre-pandemic, visitors to Kennett Square were primarily from Chester and Delaware Counties, as well as from outside of the region. However, during the pandemic, the majority of visits came from within Chester County, and to some degree from across the state line in Delaware.

Between August 2018 and March 2020, 9,295 people visited the downtown. This was slightly more than the average of 8,800 visits for all of the downtowns.

During the shutdown (March 13 - June 15) there were 335 visits, and during the reopening period (June 16 - October 31) there were 640 visits to Kennett Square’s downtown.
During the economic shutdown, there were 335 visits to Kennett Square’s downtown compared to 2,352 visits during the same period in 2019. This equated to an 86% 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%.

**Shutdown Impact**
March 13 - June 15, 2020

<table>
<thead>
<tr>
<th>Downtown</th>
<th>Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kennett Square</td>
<td>86%</td>
</tr>
<tr>
<td>52nd Street</td>
<td>75%</td>
</tr>
<tr>
<td>Bristol</td>
<td>71%</td>
</tr>
<tr>
<td>Doylestown</td>
<td>84%</td>
</tr>
<tr>
<td>Haddonfield</td>
<td>84%</td>
</tr>
<tr>
<td>Harrison (Mullica Hill)</td>
<td>77%</td>
</tr>
<tr>
<td>New Hope</td>
<td>85%</td>
</tr>
<tr>
<td>Princeton</td>
<td>90%</td>
</tr>
<tr>
<td>Quakertown</td>
<td>75%</td>
</tr>
<tr>
<td>Upper Darby</td>
<td>81%</td>
</tr>
<tr>
<td>West Chester</td>
<td>87%</td>
</tr>
<tr>
<td><strong>All Downtowns</strong></td>
<td><strong>81%</strong></td>
</tr>
</tbody>
</table>

SOURCE: BUXTON CO.
Visits to Kennett Square’s downtown increased by 91% during the reopening period to a total of 607 visits. This was 82% fewer than the 3,469 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.
Kennett Square’s pre-pandemic trade area was a 34 minute drive time, which shrank by 18% during the shutdown to 28 minutes. During reopening, the trade area recovered by 9% to 31 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.