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 | Kennett Square 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.

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 recieving 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.

43

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

48

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. 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.

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BREWERY **45**

CIRCUIT **48**

CLASSIC **46**

COLLEGE **50**

CORE **43**

EXPANDING **42**

HISTORIC **47**

OPPORTUNITY **45**

TRANSIT-ORIENTED **50**
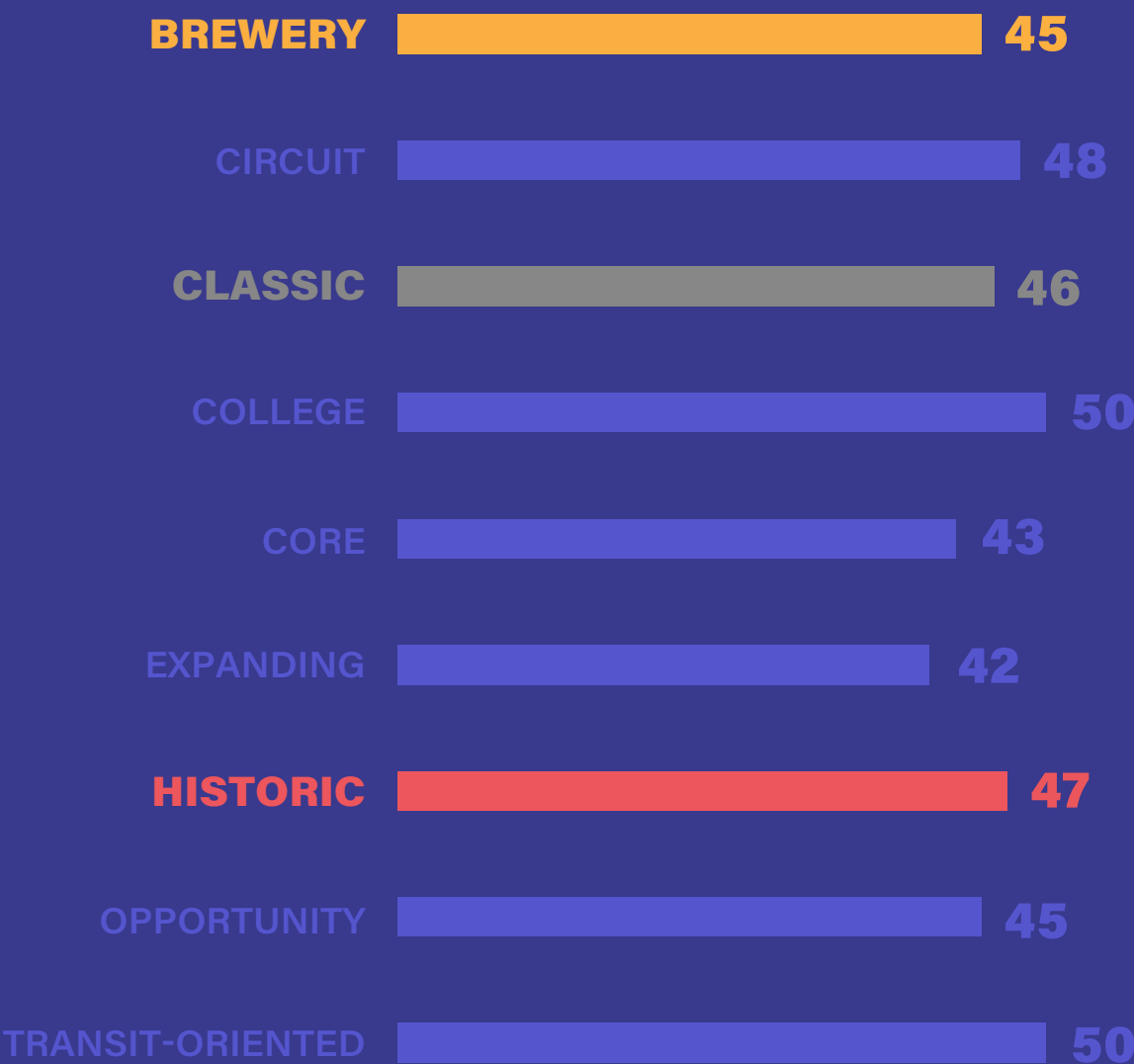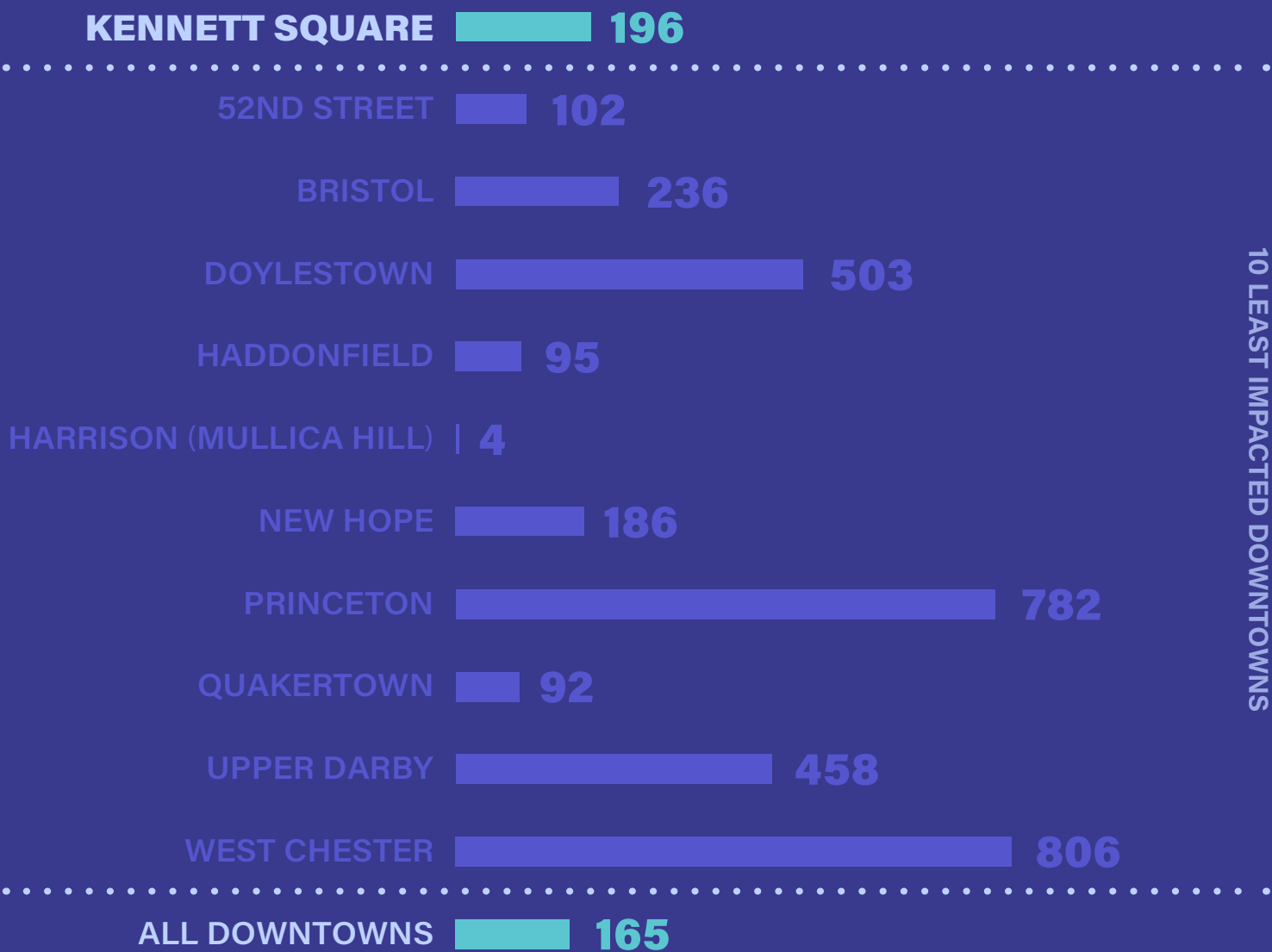
Downtown Population

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.

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SOURCE: BUXTON CO.

Downtown	Value
KENNETT SQUARE	196
52ND STREET	102
BRISTOL	236
DOYLESTOWN	503
HADDONFIELD	95
HARRISON (MULLICA HILL)	4
NEW HOPE	186
PRINCETON	782
QUAKERTOWN	92
UPPER DARBY	458
WEST CHESTER	806
ALL DOWNTOWNS	165

Mix of Uses

Retail Mix:

30%
Food & Beverage (FB)

53%
General Merchandise,
Apparel, Furnishings,
& Other (GAFO)

16%
Neighborhood Goods
& Services (NGS)

60%
Retail

6%
Civic

4%
Cultural

0%
Institutional

18%
Office

4%
Residential

8%
Vacancy

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.

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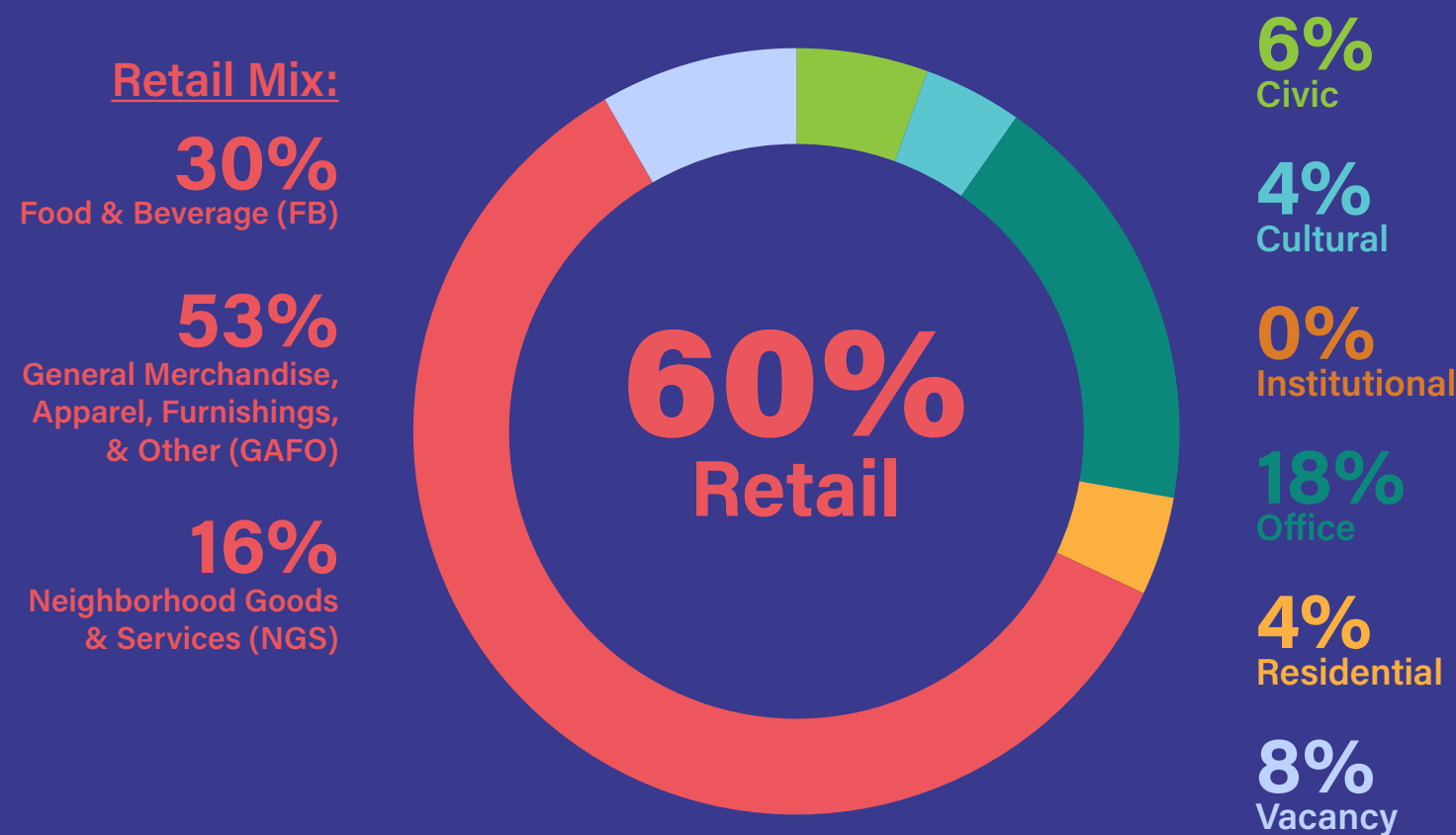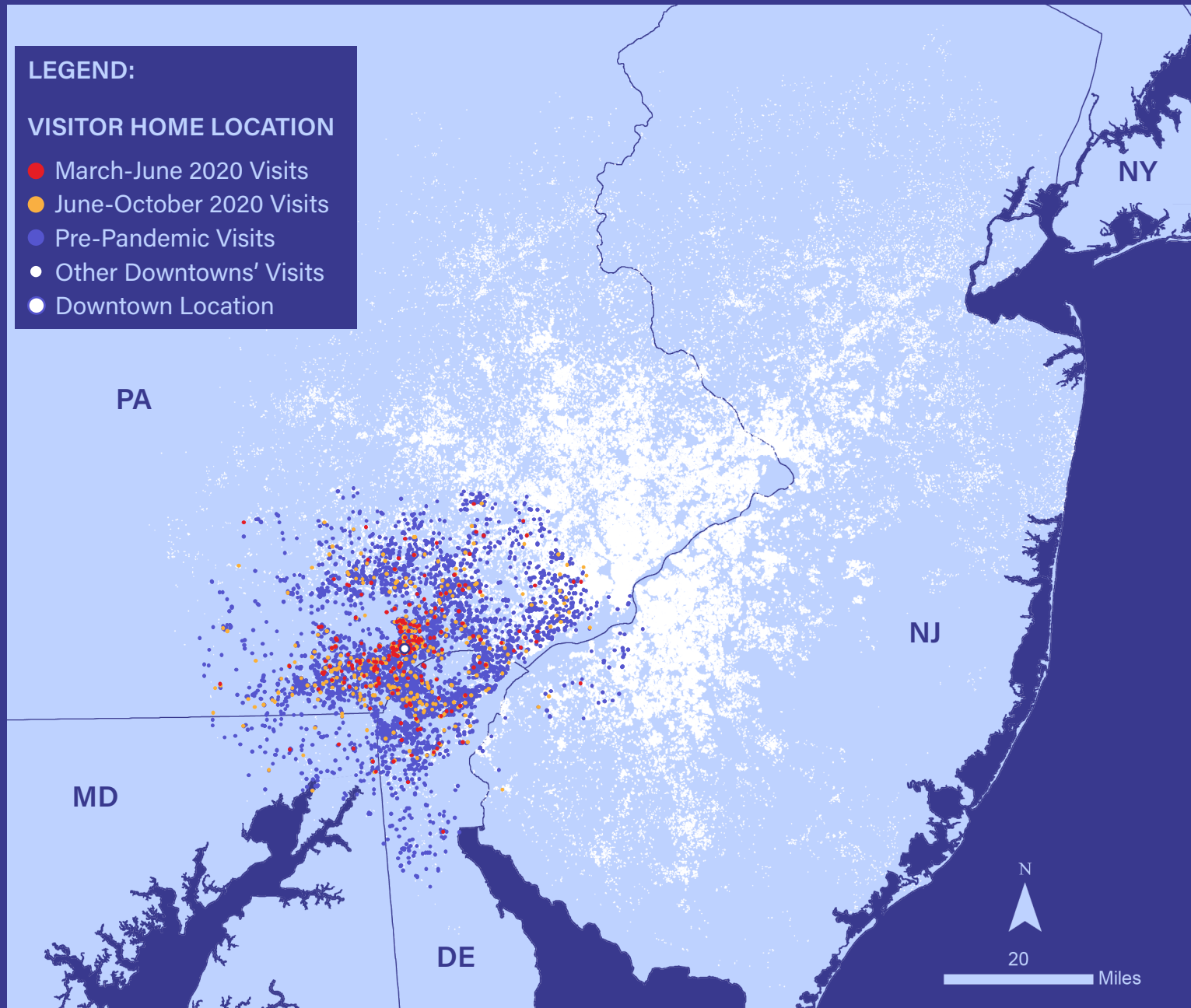
Visits to Downtown

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%	New York: 0.0%
Maryland: 2.5%	Pennsylvania: 71.7%
New Jersey: 0.7%	

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

Delaware: 13.3%	New York: 0.0%
Maryland: 2.0%	Pennsylvania: 84.3%
New Jersey: 0.4%	

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

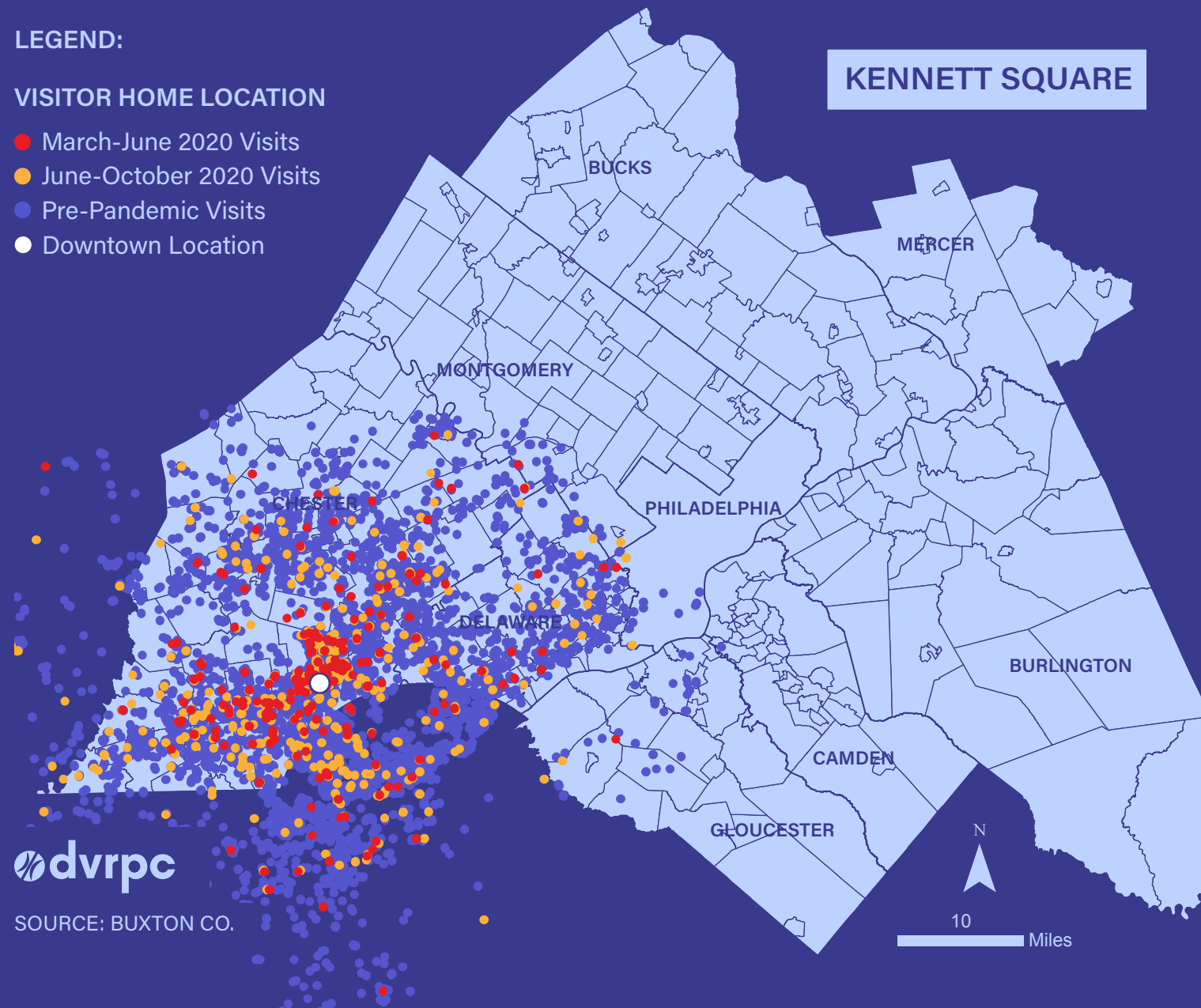|	
Delaware: 16.5%	New York: 0.0%
Maryland: 2.0%	Pennsylvania: 80.7%
New Jersey: 0.7%	

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SOURCE: BUXTON CO.

LEGEND:

VISITOR HOME LOCATION

● March-June 2020 Visits
● June-October 2020 Visits
● Pre-Pandemic Visits
● Other Downtowns' Visits
● Downtown Location

KENNETT SQUARE

BUCKS

MERCER

MONTGOMERY

CHESTER

PHILADELPHIA

DELAWARE

BURLINGTON

CAMDEN

GLOUCESTER

N

10 Miles

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SOURCE: BUXTON CO.

Visits to Downtown

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.
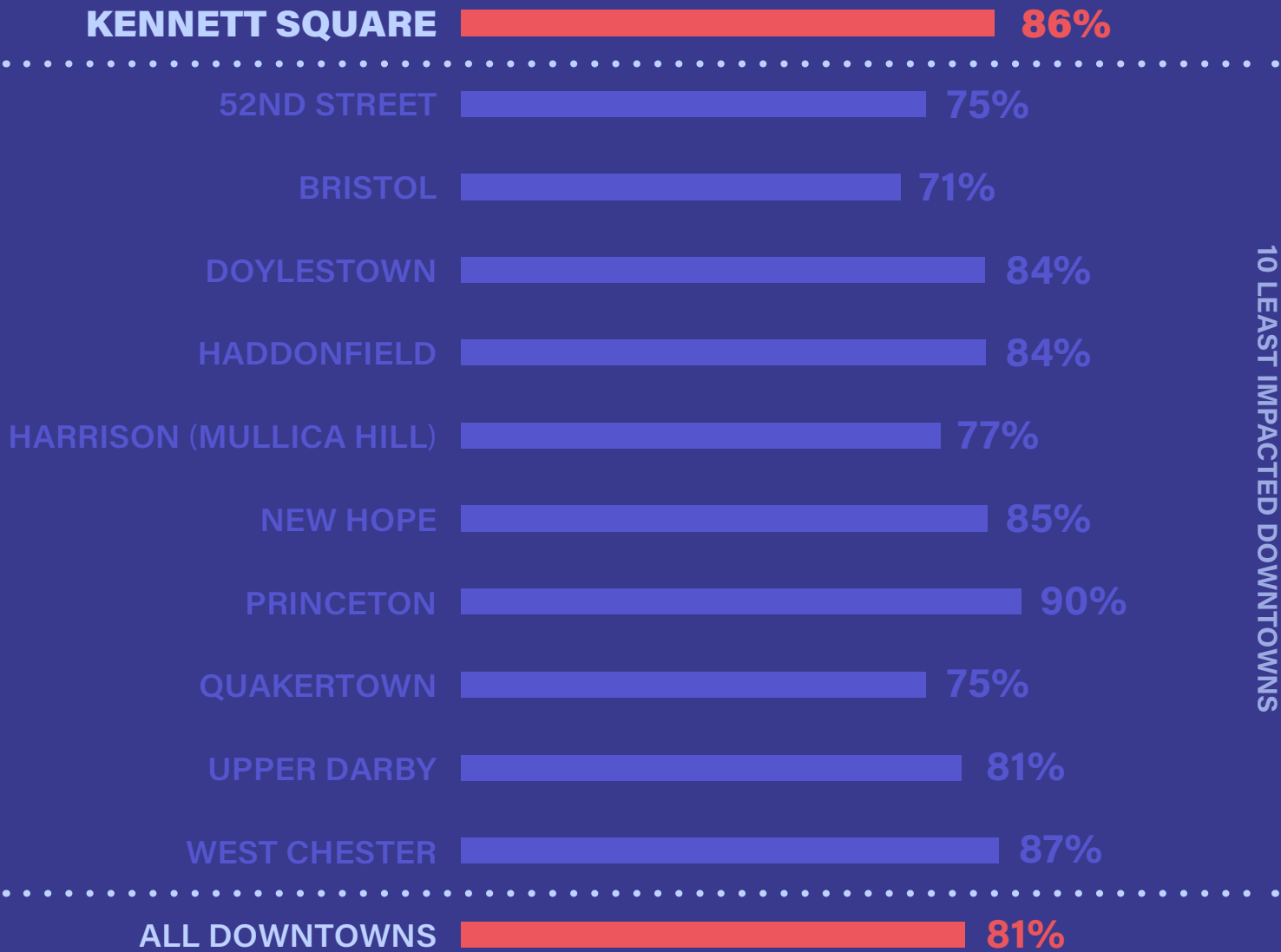
Shutdown Impact
March 13 - June 15, 2020

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%.

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SOURCE: BUXTON CO.

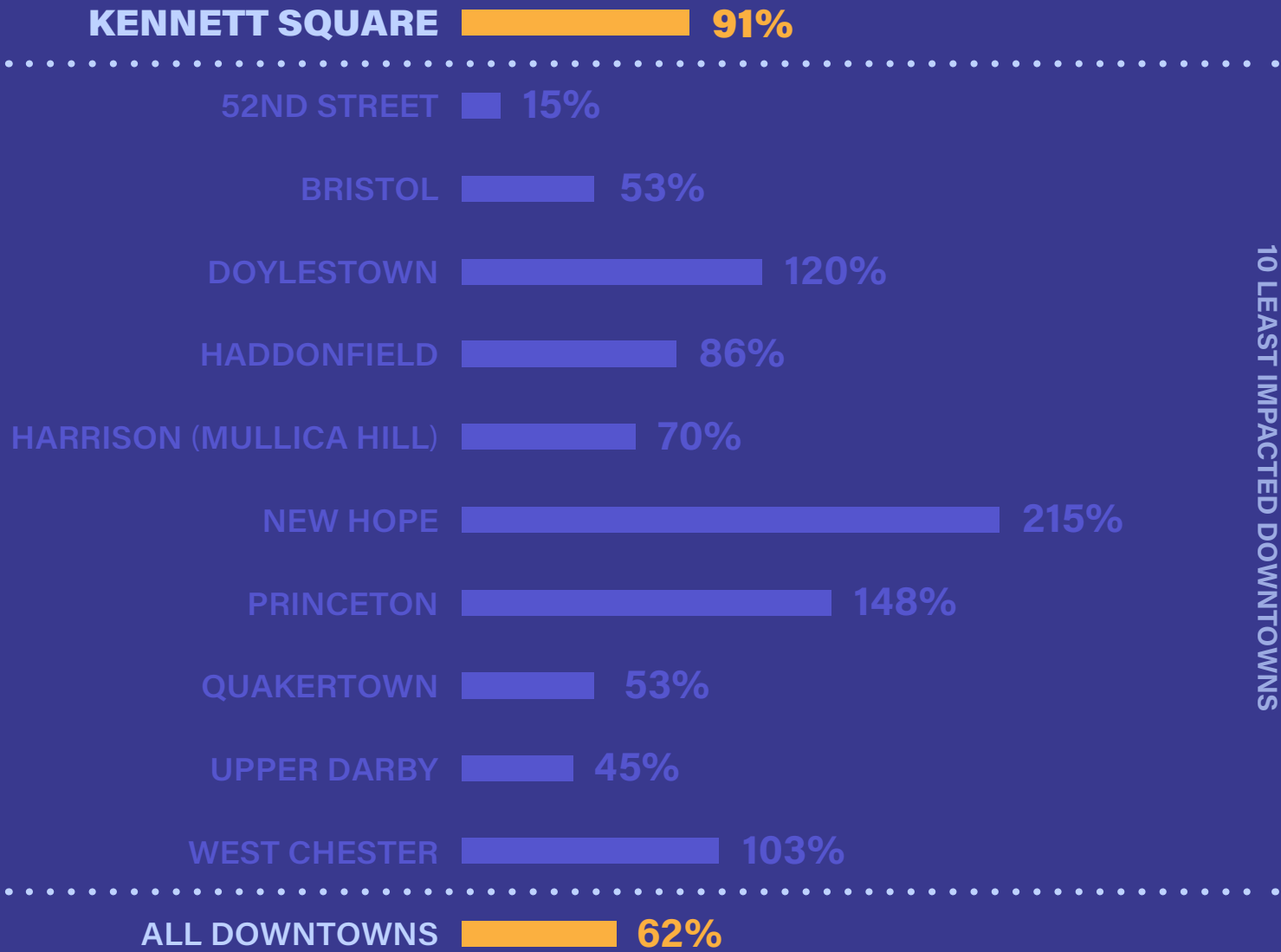|	
KENNETT SQUARE	86%
52ND STREET	75%
BRISTOL	71%
DOYLESTOWN	84%
HADDONFIELD	84%
HARRISON (MULLICA HILL)	77%
NEW HOPE	85%
PRINCETON	90%
QUAKERTOWN	75%
UPPER DARBY	81%
WEST CHESTER	87%
ALL DOWNTOWNS	81%

Reopening Rebound

June 16 - October 31, 2020

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.

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KENNETT SQUARE ▬▬▬▬ **91%**

52ND STREET ▬ 15%

BRISTOL ▬ 53%

DOYLESTOWN ▬▬▬ 120%

HADDONFIELD ▬▬ 86%

HARRISON (MULLICA HILL) ▬▬ 70%

NEW HOPE ▬▬▬▬▬ 215%

PRINCETON ▬▬▬▬ 148%

QUAKERTOWN ▬ 53%

UPPER DARBY ▬ 45%

WEST CHESTER ▬▬▬ 103%

ALL DOWNTOWNS ▬▬▬ **62%**

10 LEAST IMPACTED DOWNTOWNS

Trade Area Recovery
(Drive Time in Minutes)

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.

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10 LEAST IMPACTED DOWNTOWNS

Downtown	Recovery
KENNETT SQUARE	9%
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%