

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 | Coatesville City, 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.

Coatesville has a walkable and historic downtown, and one of the most diverse residential populations. It also benefits from its multiple civic uses. However, it lacks the diversity of other uses and its retail mix consists of a large number of Neighborhood Goods & Services (NGS) retailers. These characteristics are why the downtown earned a Diversity Score of 44, which is slightly better than average.

The downtown most likely benefited from its robust residential population, but the large construction site, high vacancy rate, and the high share of NGS retailers most likely exacerbated the pandemic's impact. This is reflected in Coatesville's Pandemic Impact Score of 56, which is slightly higher than average.

44

Diversity Score

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

56

Pandemic Impact Score

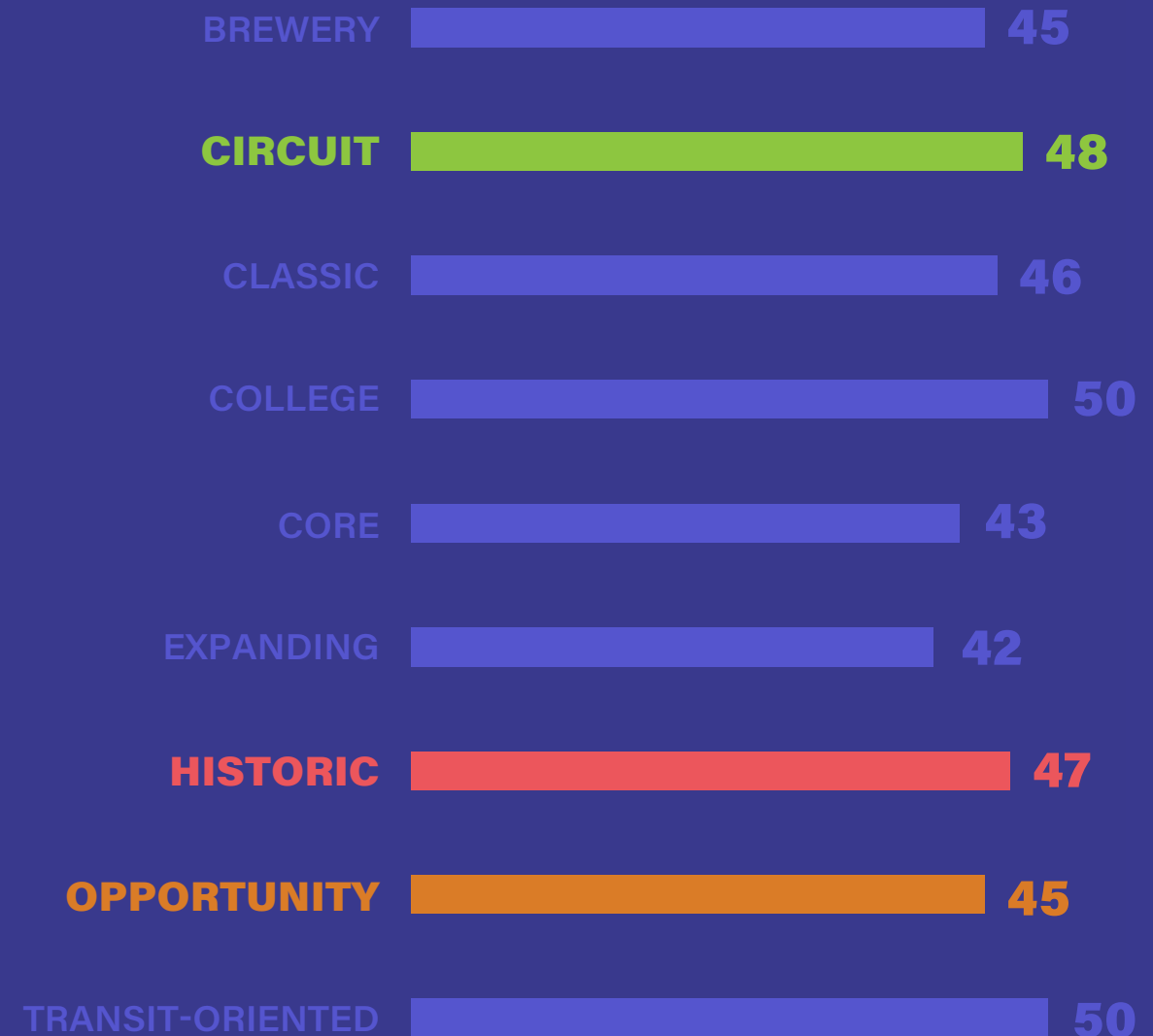
Visits and trade area pre-pandemic, and during the shut-down and reopening periods

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. Coatesville is considered to be three typologies: *Circuit* (although the trail is not existing), *Historic*, and *Opportunity*. On average, downtowns that are four typologies had a Pandemic Impact Score of 53.

It is worth noting that *Circuit* downtowns that have not yet built their trails had an average score of 53 compared to 48 for those with existing trails.



Downtown Population

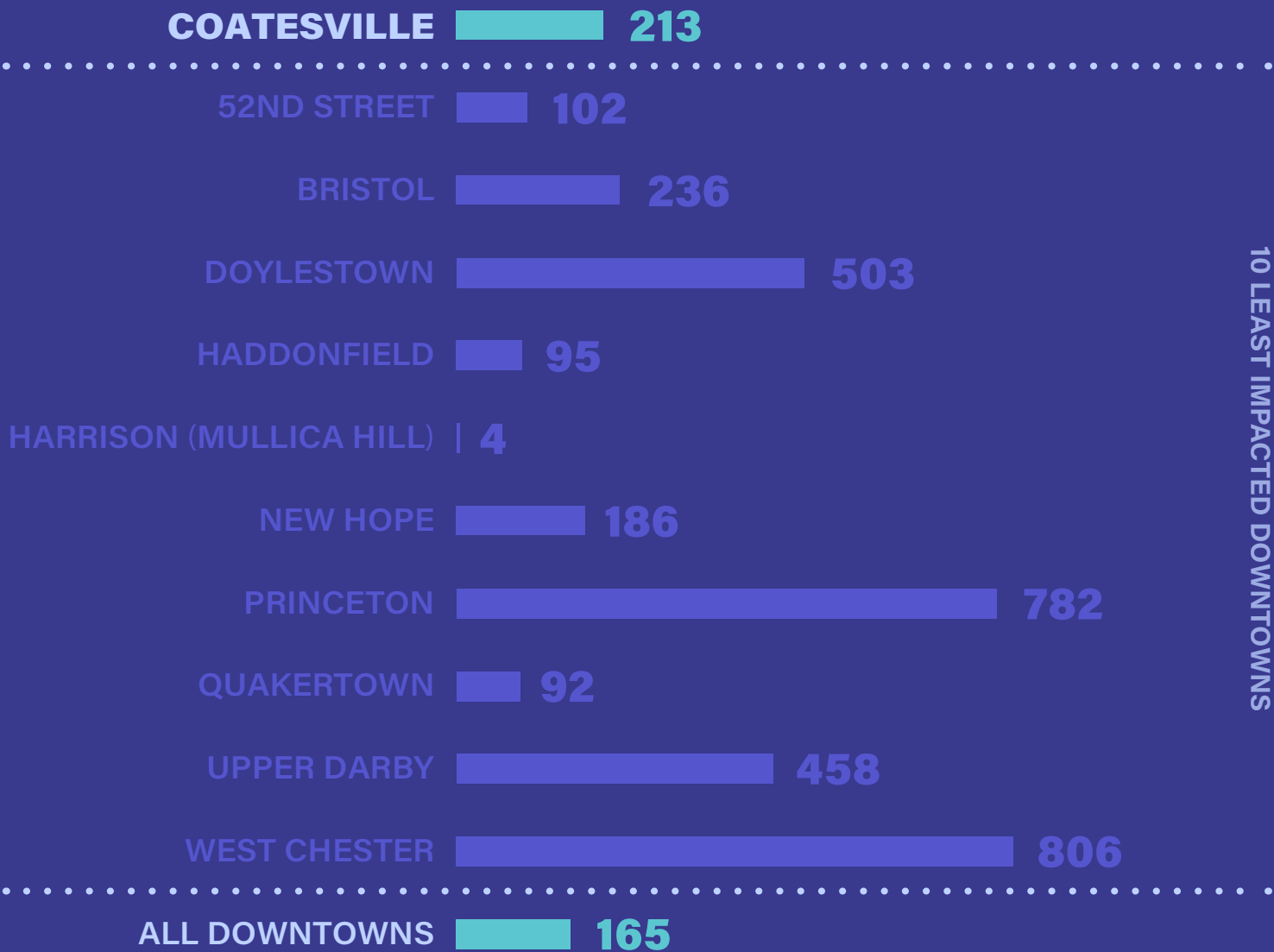
A negative correlation between the estimated population of the region’s downtowns and the Pandemic Impact Score was identified. In other words, the larger the downtown population, the smaller the impact.

In 2019, the population of Coatesville’s downtown was estimated to be 213, which is more than the average of 165 for all downtowns and less than the average of 326 for the least impacted downtowns.

Coatesville’s downtown population is one of the most diverse in the region with regards to demographics, with the White, Black, and Hispanic populations accounting for 22%, 51%, and 35% respectively.



SOURCE: BUXTON CO.

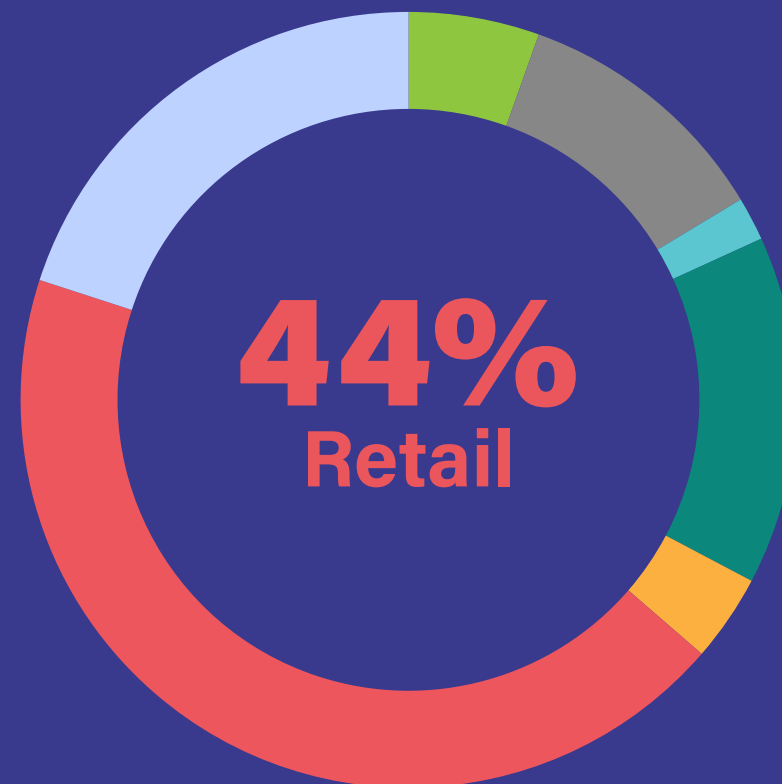


Mix of Uses

Retail accounts for 44% of the uses Coatesville, which is one of the lowest shares in the region. The average for all downtowns was 57% and it was 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage (FB)* and *General Merchandise, Apparel, Furnishings & Other (GAFO)* retailers each made up larger shares at 30% and 38% respectively. In general, as the share of each of these increased, the Pandemic Impact Score decreased.

Conversely, *Neighborhood Goods & Services (NGS)* retailers made up a significantly smaller share in the least impacted downtowns at 30%, and Coatesville has one of the highest vacancy rates in the region. On average, as the share of NGS retailers or a downtown's vacancy rate increased, so did the Pandemic Impact Score.



5%
Civic

11%
Construction

2%
Cultural

0%
Institutional

15%
Office

4%
Residential

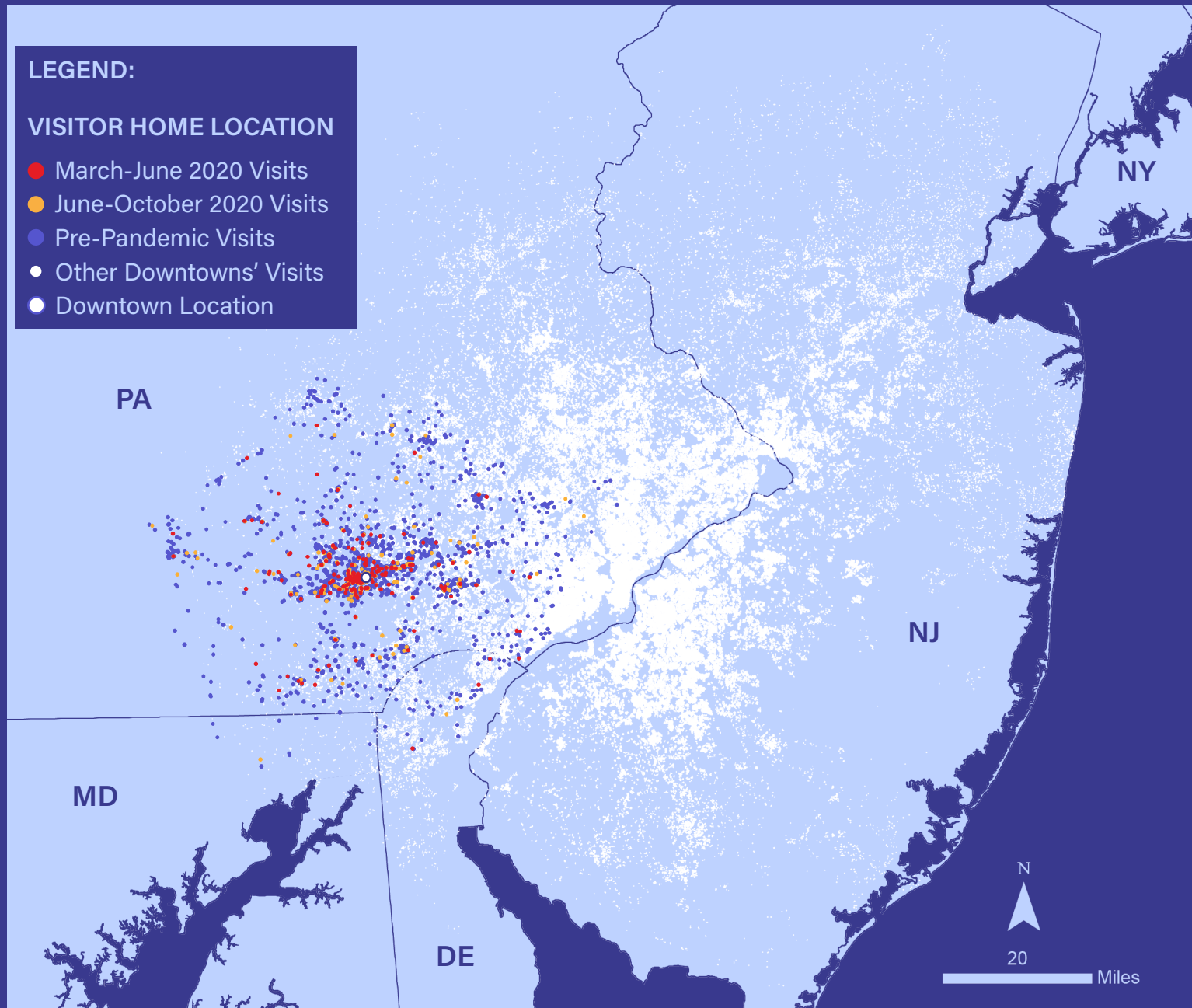
20%
Vacancy

Retail Mix:

17%
Food & Beverage (FB)

29%
General Merchandise,
Apparel, Furnishings,
& Other (GAFO)

54%
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 Coatesville were as follows:

● Pre-Pandemic

Delaware: 1.3%	New York: 0.0%
Maryland: 0.3%	Pennsylvania: 98.4%
New Jersey: 0.0%	

● Shutdown | March 13 - June 15, 2020

Delaware: 1.1%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 98.9%
New Jersey: 0.0%	

● Reopening | June 16 - October 31, 2020

Delaware: 1.0%	New York: 0.0%
Maryland: 0.3%	Pennsylvania: 98.7%
New Jersey: 0.0%	

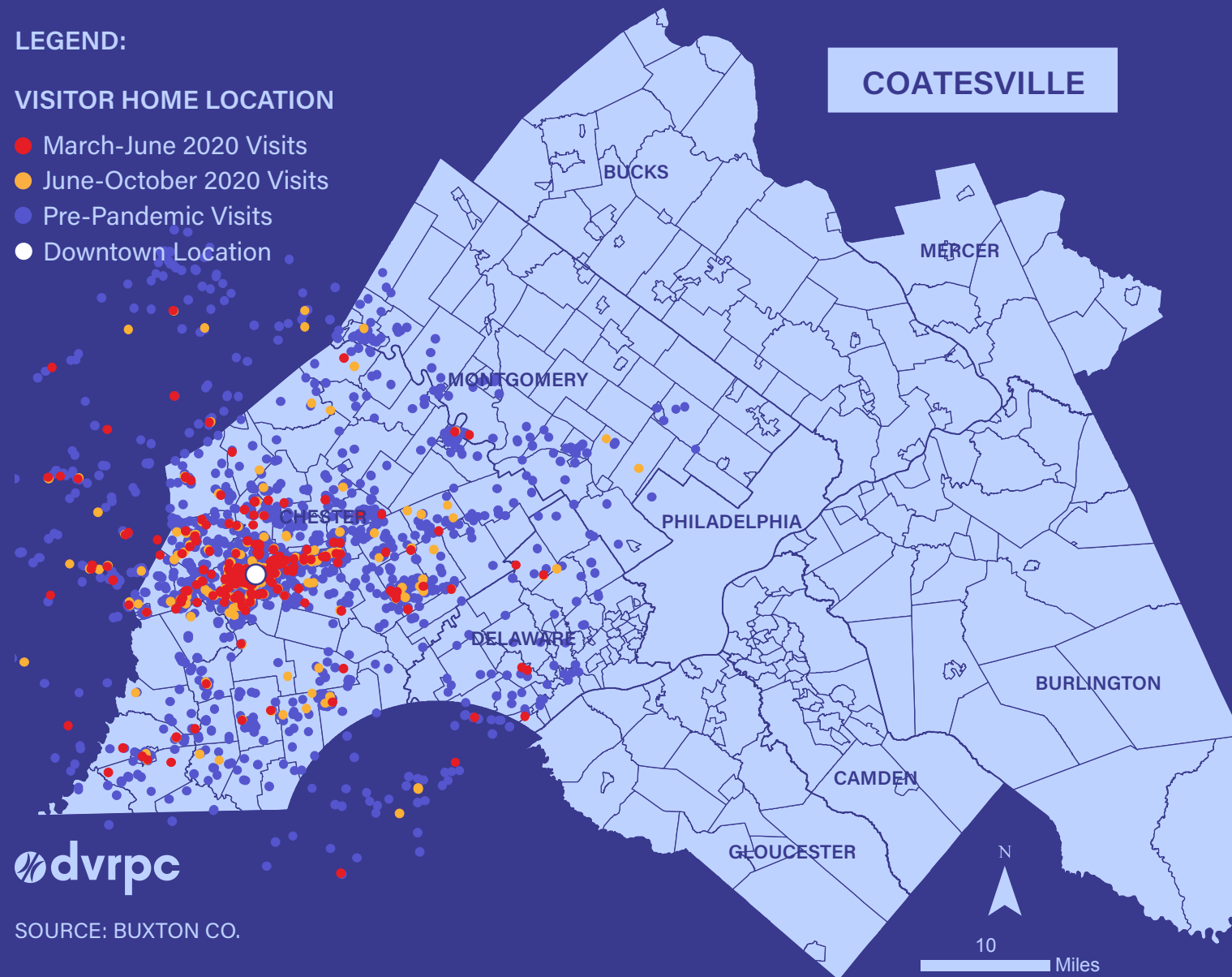


SOURCE: BUXTON CO.

LEGEND:

VISITOR HOME LOCATION

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



SOURCE: BUXTON CO.

Visits to Downtown

The majority of visitors to Coatesville, both before and during the pandemic, came from within Chester County, and to some degree from areas west of the region and in Delaware.

Between August 2018 and March 2020, 4,062 people visited the downtown. This was less than half of the average of 8,800 for all of the downtowns.

During the shutdown (March 13 - June 15) there were 321 visits to Coatesville, and during the reopening period (June 16 - October 31) there were 381 visits.

Shutdown Impact

March 13 - June 15, 2020

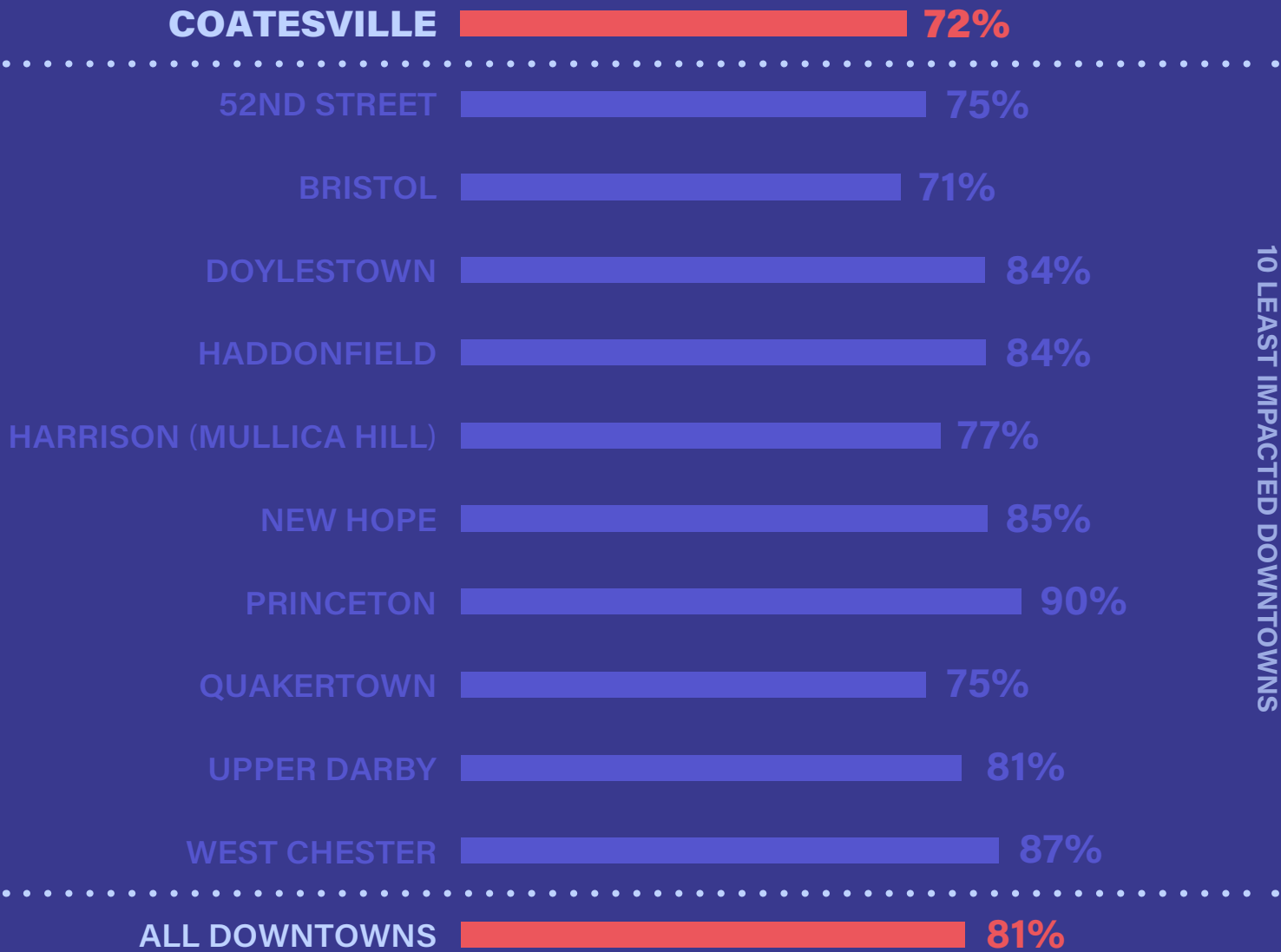
During the economic shutdown, there were 321 visits to Coatesville compared to 1,151 visits during the same period in 2019. This equated to a 72% reduction, which was one of the smallest reductions observed.

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

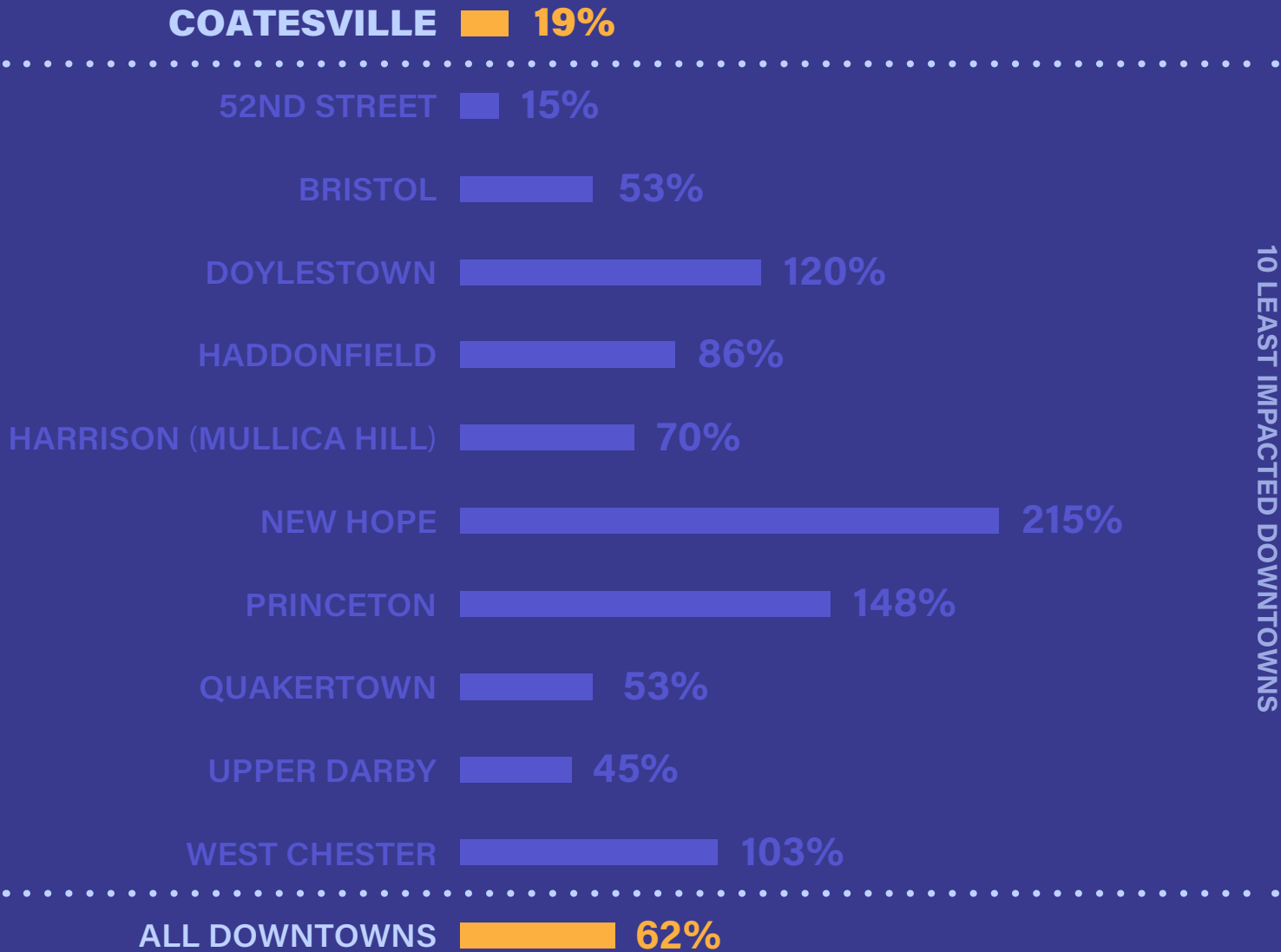
Visits to Coatesville increased by 19% during the reopening period to a total of 381 visits, which was 74% fewer than the 1,486 visits that occurred during the same period in 2019.

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.



SOURCE: BUXTON CO.



Trade Area Recovery

(Drive Time in Minutes)

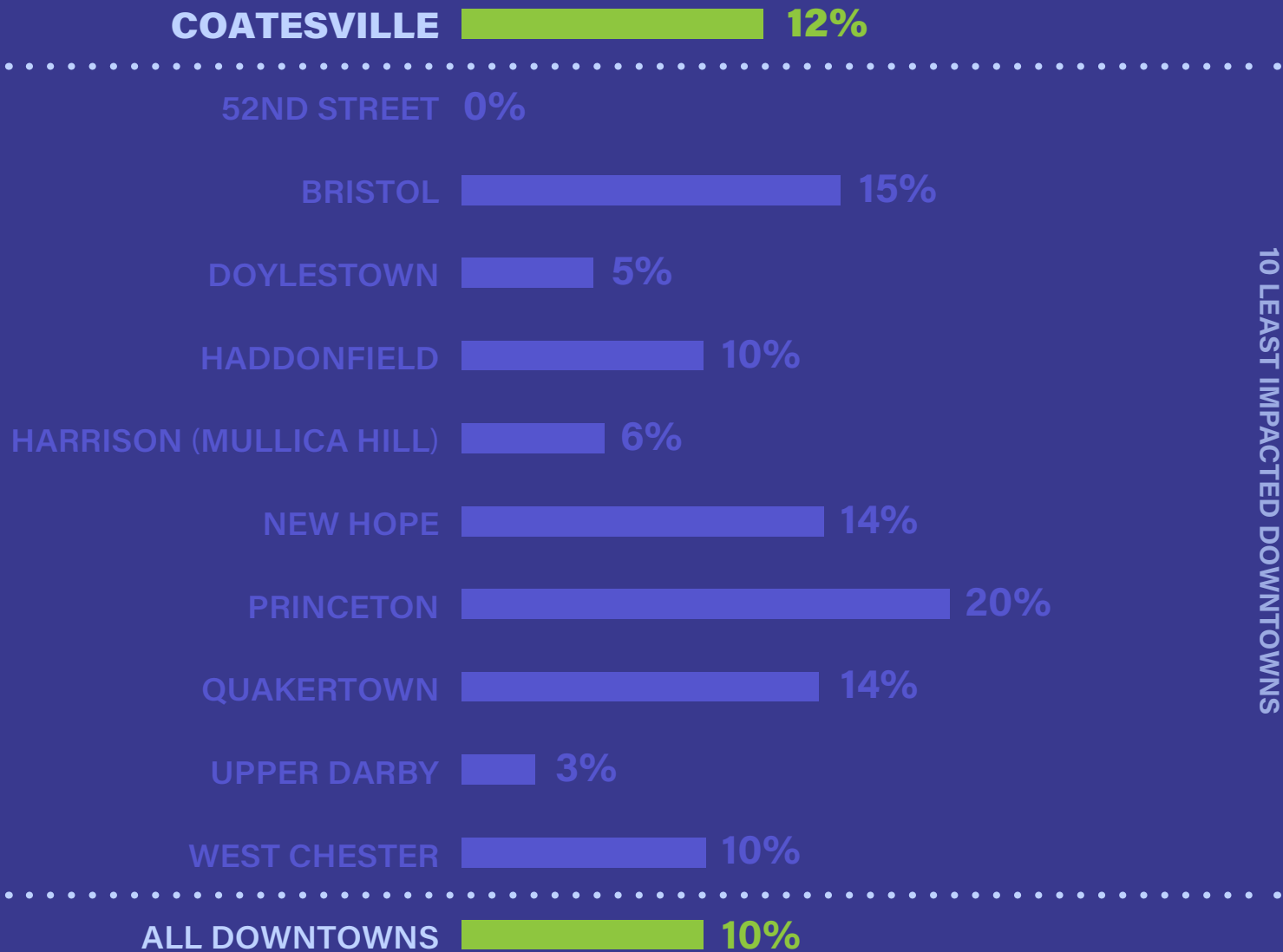
Coatesville’s pre-pandemic trade area was 26 minutes, which shrank by 27% during the shutdown to 19 minutes. During reopening, the trade area recovered by 12% to 22 minutes.

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.



SOURCE: BUXTON CO.



10 LEAST IMPACTED DOWNTOWNS