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

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.

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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 | Chester City (Avenue of the States), 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.

Chester's Avenue of the States is walkable, and it has a healthy mix of retail types along with a number of civic and cultural uses. However, it lacks the diversity of uses and the robust residential population that other downtowns have. These characteristics are why the Avenue of the States earned a Diversity Score of 43, which is better than average.

The Avenue of the States most likely benefited from its relative diversity, which is reflected in its better than average Pandemic Impact Score of 41.

43

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

## 41

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. The Avenue of the States is considered to be four typologies: *Circuit* (although the trail is not existing)*, Core, Opportunity,* and *Transit-Oriented*. On average, downtowns that are four typologies had a Pandemic Impact Score of 44.

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.
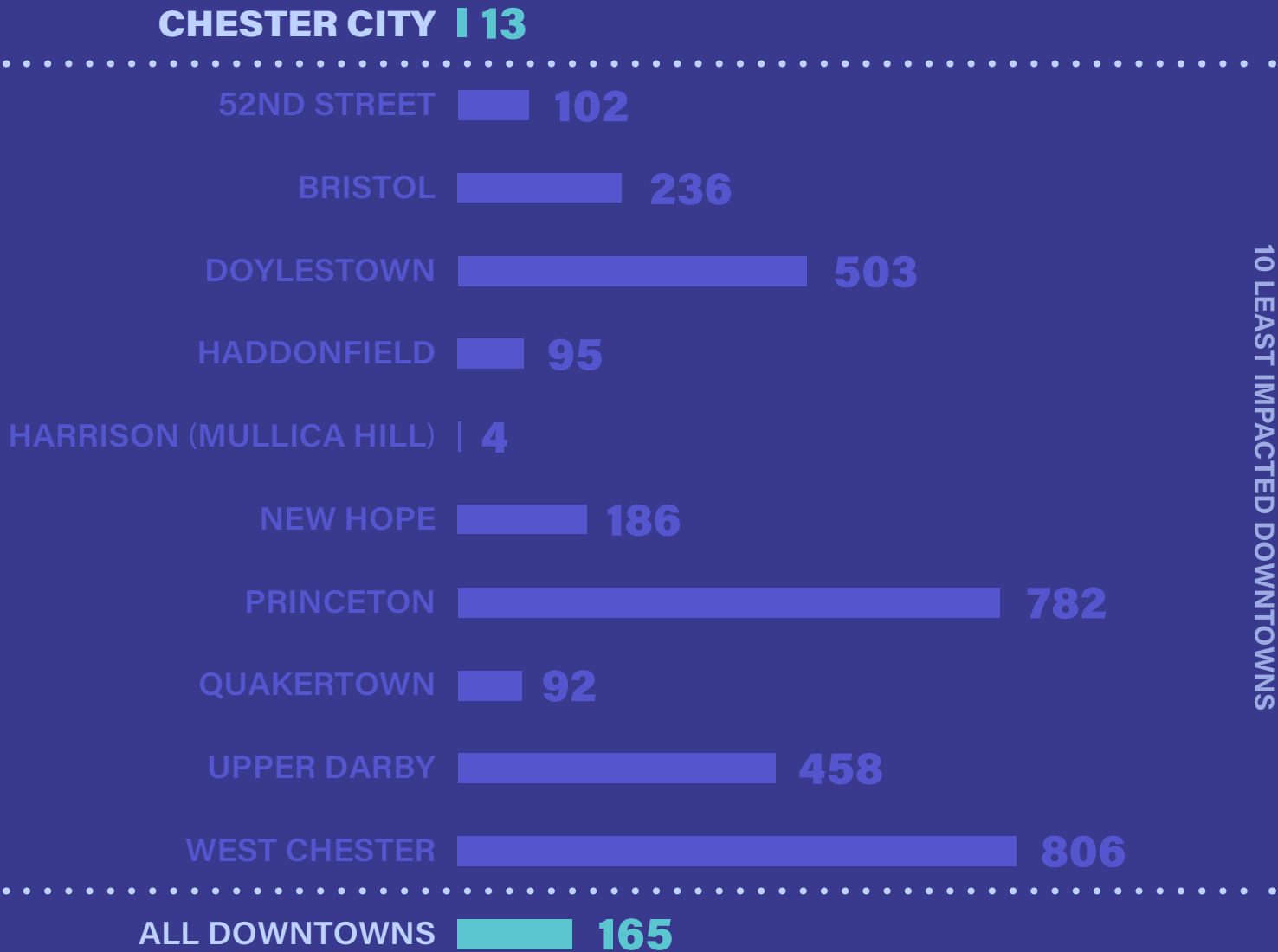
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BREWERY 45

CIRCUIT 48

CLASSIC 46

COLLEGE 50

CORE 43

EXPANDING 42

HISTORIC 47

OPPORTUNITY 45

TRANSIT-ORIENTED 50
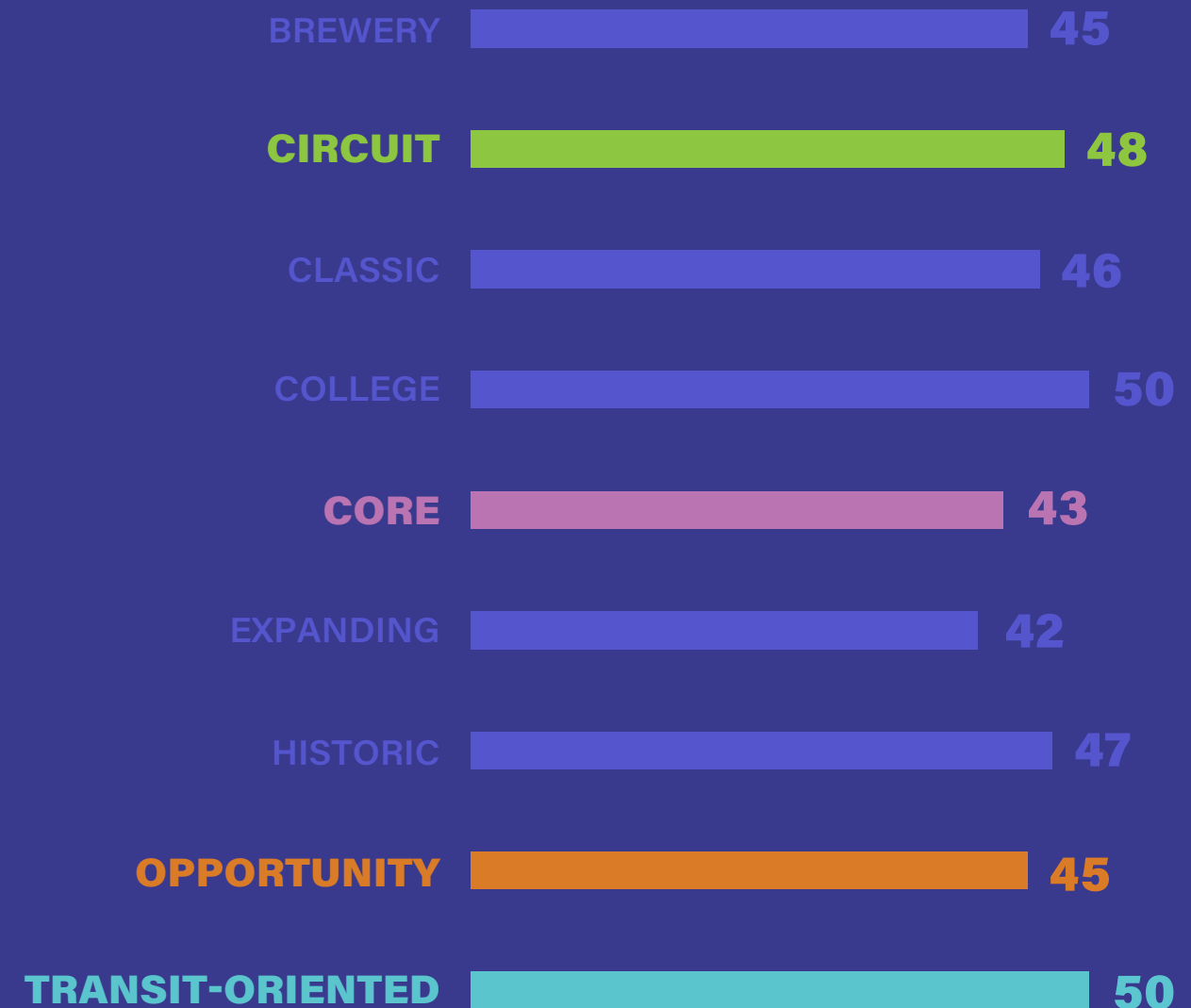
Downtown Population

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, the population of the Avenue of the States was estimated to be 13, which is significantly lower than the averages of 165 for all downtowns and 326 for the least impacted downtown.

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SOURCE: BUXTON CO.

CHESTER CITY | 13

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:

15%
Food & Beverage (FB)

59%
General Merchandise,
Apparel, Furnishings,
& Other (GAFO)

26%
Neighborhood Goods
& Services (NGS)

49%
Retail

4%
Civic

13%
Cultural

0%
Institutional

10%
Office

1%
Residential

23%
Vacancy

Retail accounts for 49% of the uses along the Avenue of the States, which is lower than the average of 57% for all downtowns and 60% for the least impacted downtowns.

In the least impacted downtowns, *Food & Beverage* (FB) retailers made up a larger share of retail on average at 30%, and *General Merchandise, Apparel, Furnishings & Other* (GAFO) retailers made up a much smaller share at 38%. In general, as the share of each of these increased, the Pandemic Impact Score descreased.

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

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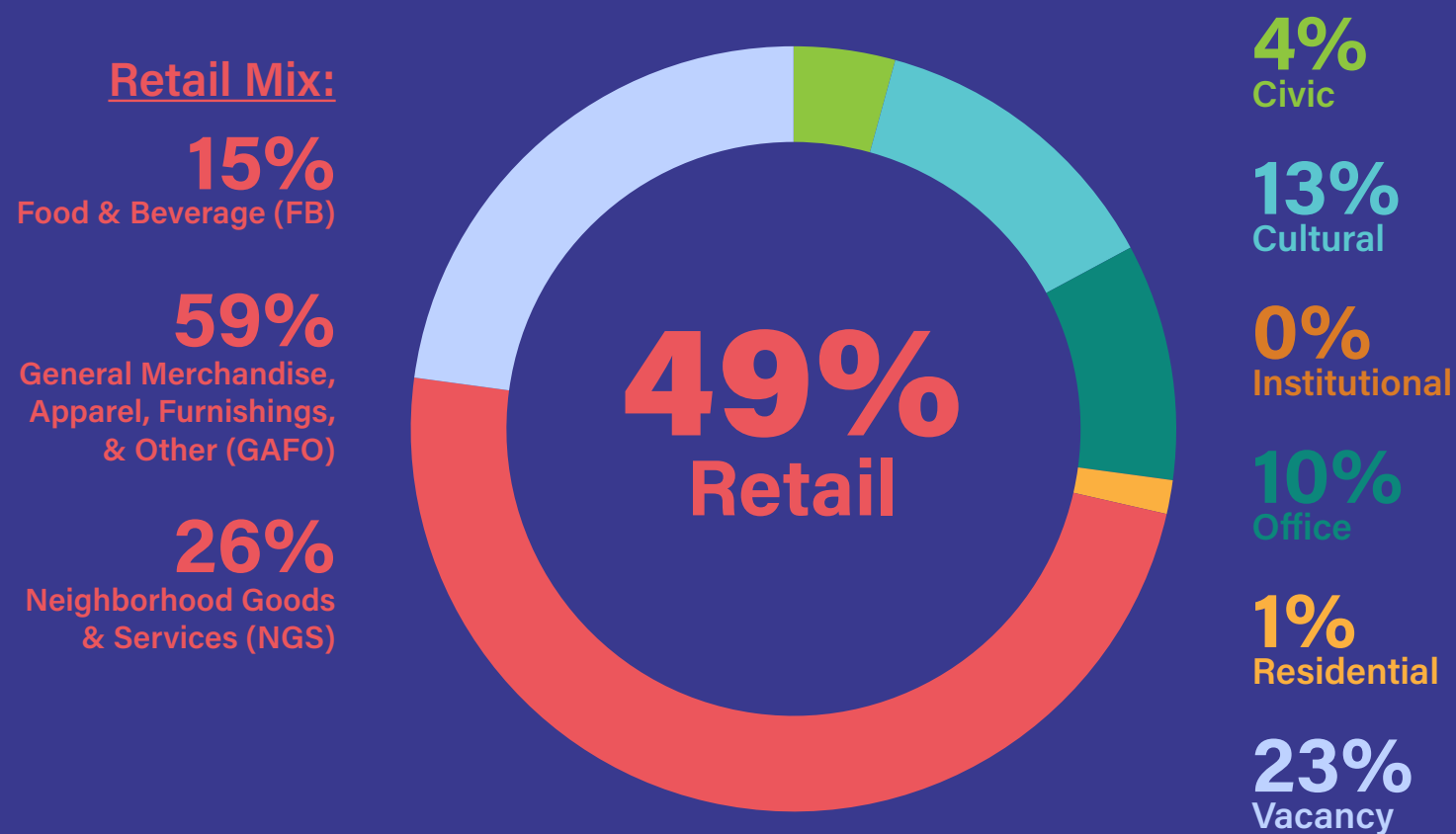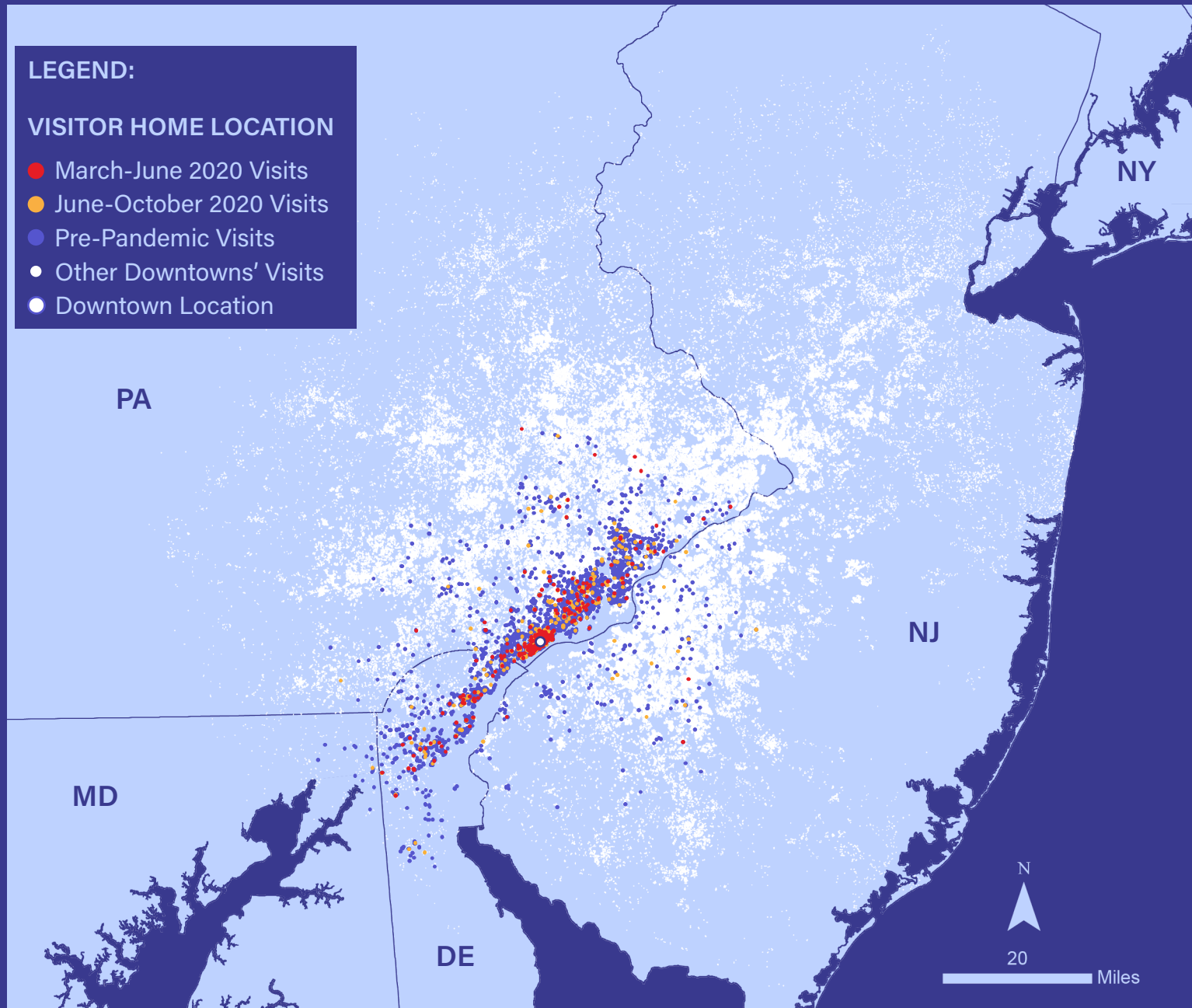
Visits to Downtown

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 the Avenue of the States were as follows:

Pre-Pandemic

Delaware: 14.0%	New York: 0.0%
Maryland: 0.3%	Pennsylvania: 82.5%
New Jersey: 3.2%	

Shutdown | March 13 - June 15, 2020

Delaware: 10.7%	New York: 0.0%
Maryland: 0.0%	Pennsylvania: 88.5%
New Jersey: 0.8%	

Reopening | June 16 - October 31, 2020

Delaware: 9.7%	New York: 0.0%
Maryland: 0.2%	Pennsylvania: 87.7%
New Jersey: 2.4%	

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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
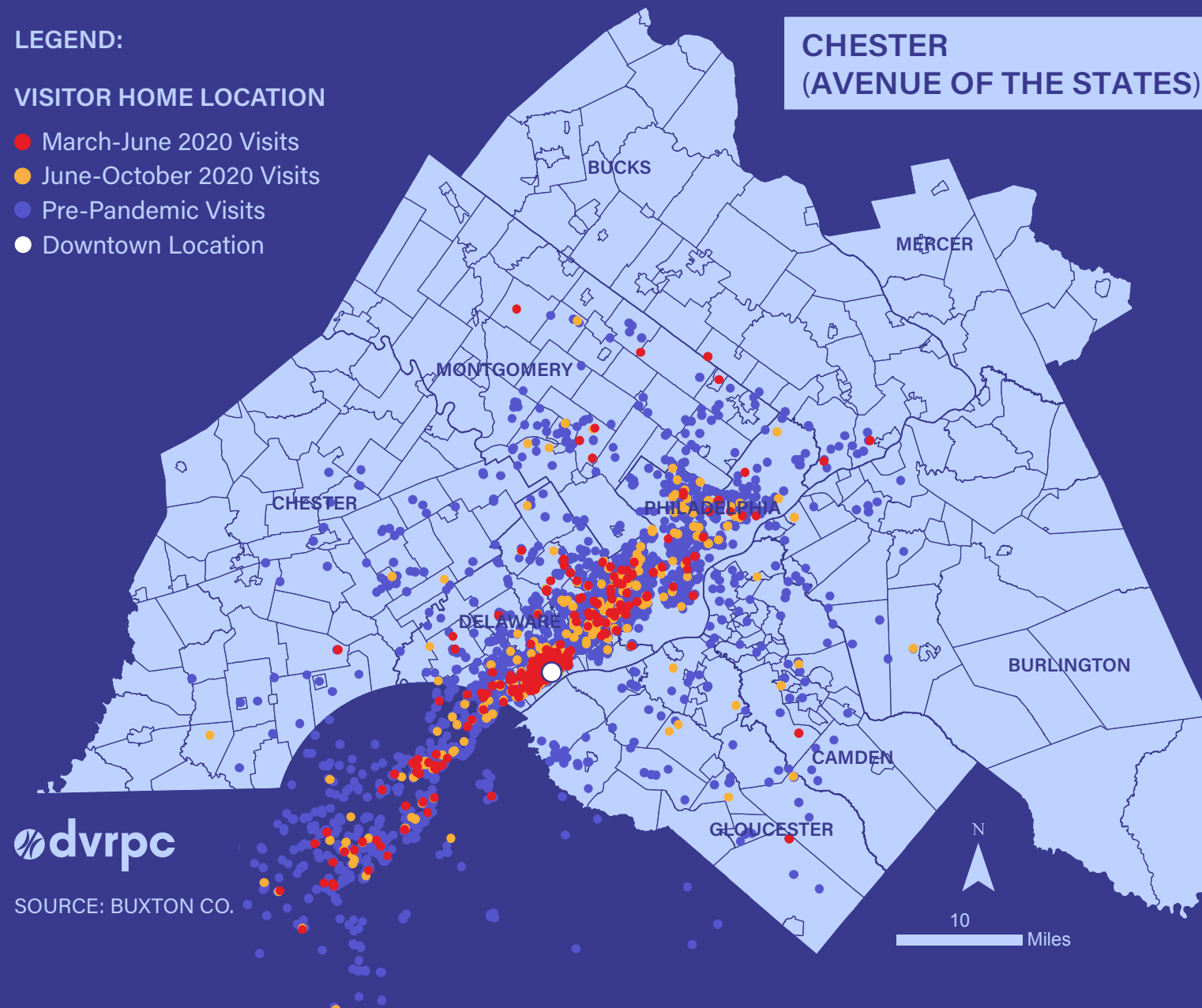
LEGEND:

VISITOR HOME LOCATION

- 🔴 March-June 2020 Visits
- 🟠 June-October 2020 Visits
- 🟣 Pre-Pandemic Visits
- ⚪ Downtown Location

CHESTER
(AVENUE OF THE STATES)

BUCKS

MERCER

MONTGOMERY

CHESTER

PHILADELPHIA

DELAWARE

BURLINGTON

CAMDEN

GLOUCESTER

N

10 Miles

Visits to Downtown

The majority of visitors to the Avenue of the States, both before and during the pandemic, came from communities along the I-95 and SEPTA's Wilmington-Newark regional rail corridors.

Between August 2018 and March 2020, 5,554 people visited the downtown. This was more than 3,000 fewer than the average of 8,800 for all of the downtowns.

During the shutdown (March 13 - June 15) there were 439 visits to the Avenue of the States, and during the reopening period (June 16 - October 31) there were 566 visits.
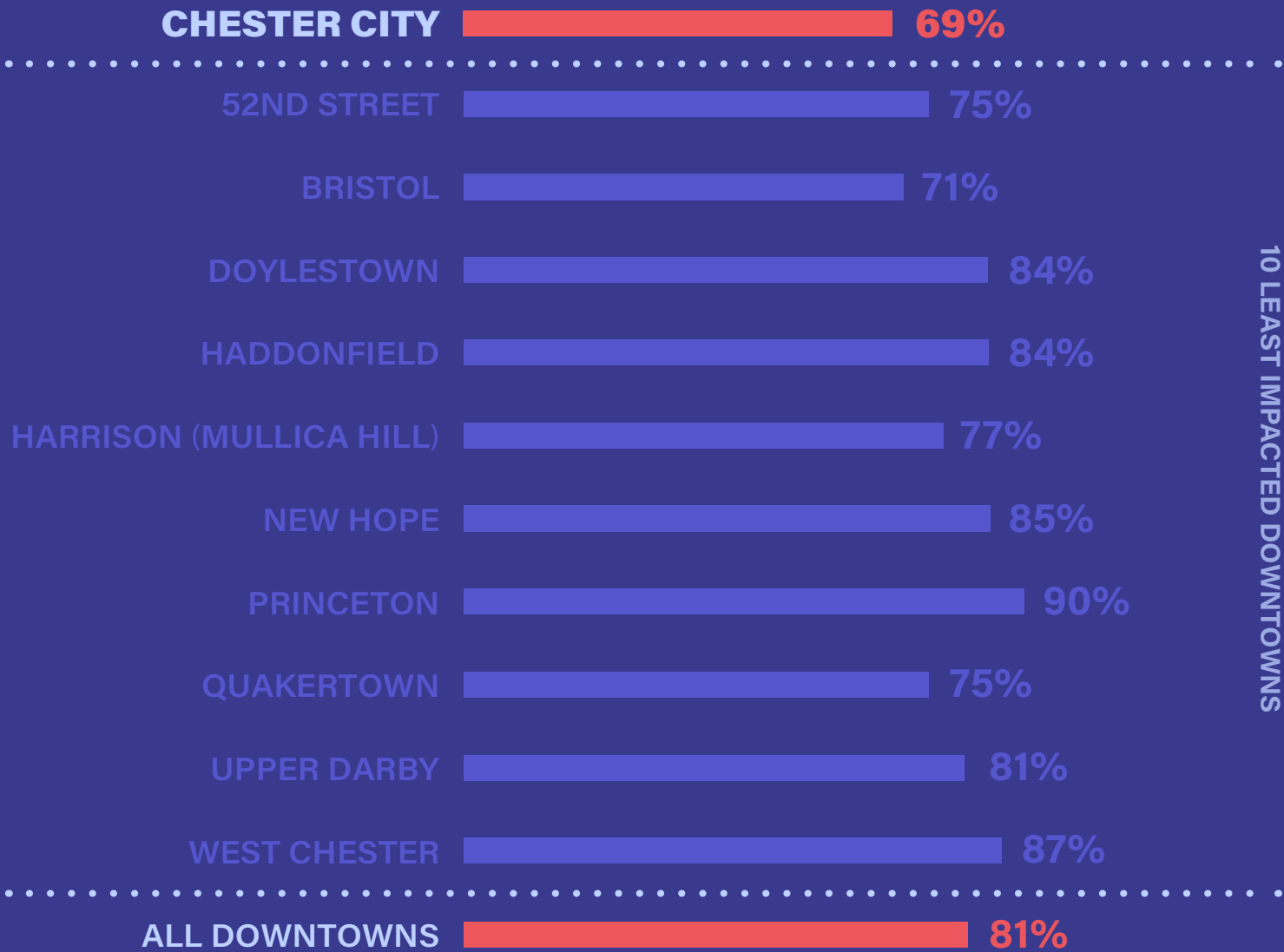
Shutdown Impact

March 13 - June 15, 2020

During the economic shutdown, there were 439 visits to the Avenue of the States compared to 1,404 visits during the same period in 2019. This equated to a 69% 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%.

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SOURCE: BUXTON CO.

CHESTER CITY — **69%**

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%**

10 LEAST IMPACTED DOWNTOWNS
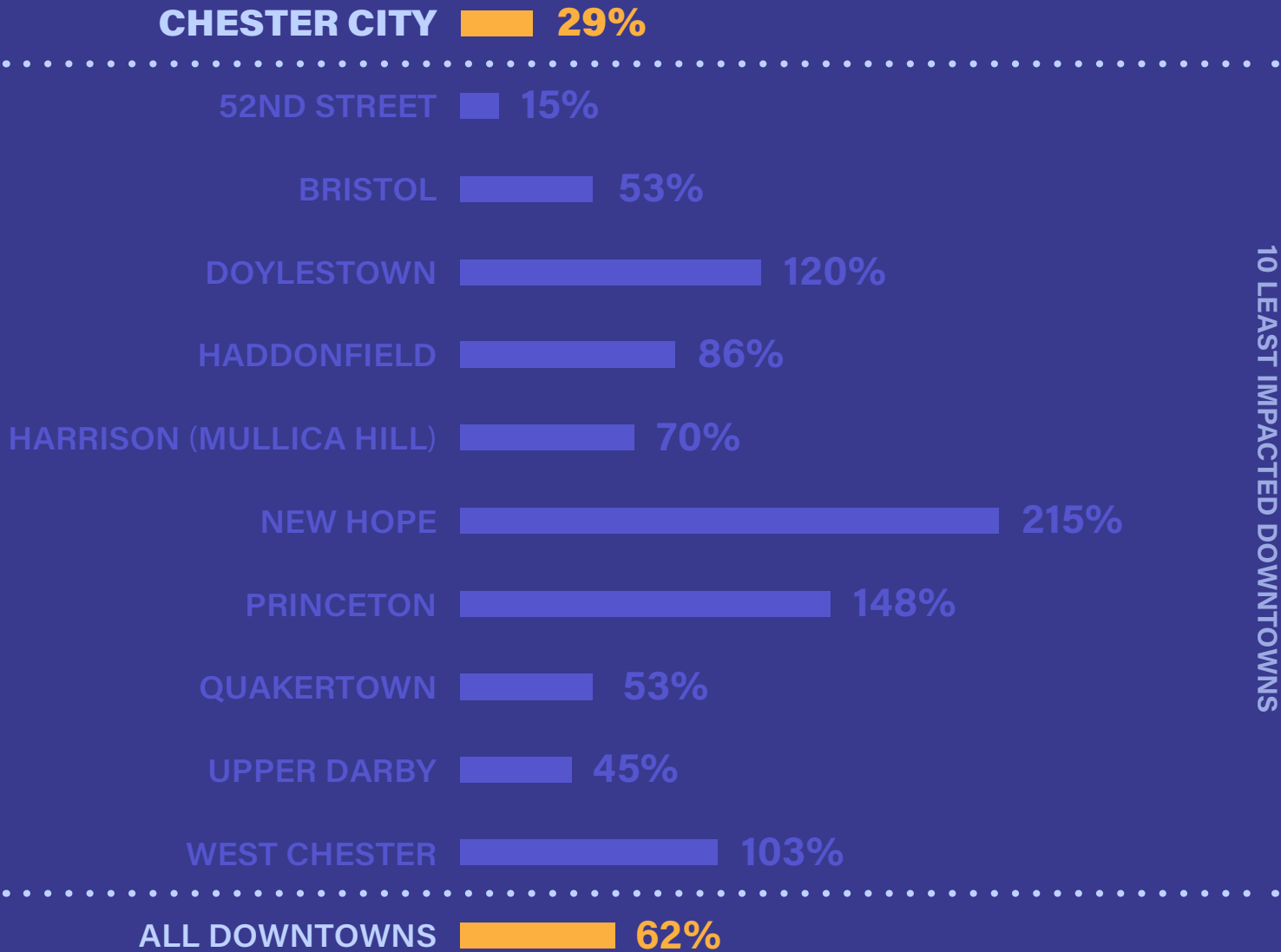
Reopening Rebound

June 16 - October 31, 2020

Visits to the Avenue of the States increased by 29% during the reopening period to a total of 566 visits, which was 69% fewer than the 1,810 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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SOURCE: BUXTON CO.

10 LEAST IMPACTED DOWNTOWNS

CHESTER CITY	29%
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%

Trade Area Recovery
(Drive Time in Minutes)

The Avenue of the State's had pre-pandemic trade area of 32 minutes, which shrank by 22% during the shutdown to 25 minutes. During reopening, the trade area recovered by 6% to 27 minutes, which was the average drive time for all downtowns.

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.

⊘dvrpc

SOURCE: BUXTON CO.

10 LEAST IMPACTED DOWNTOWNS

CHESTER CITY 6%

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%