Retail Districts of Greater Philadelphia:
Using Location Analytics to Plan for a Post-Pandemic Economic Recovery

February 2021
Background and Next Steps

**2008**
Classic Towns program launched to help promote and market the region’s downtowns

**2019**
Classic Towns program discontinued

**Spring 2020**
COVID-19 pandemic impacted region, and DVRPC launched 5 Ps that Aren’t Pandemic social media campaign
Location analytics identified as a tool to help plan for recovery

**Fall 2020**
DVRPC executes location analytics contract with Buxton Co.
Retail inventory update complete
Location analytics begins

**March 2021**
One year into the pandemic:
DVRPC launches Diverse Downtowns social media campaign
Reports findings to partners

**2013**
DVRPC inventories 70+ retail districts, and publishes: Revitalizing Suburban Downtown Retail Districts: Strategies and Best Practices

**Winter 2020**
DVRPC began updating retail district inventory

**Summer 2020**
DVRPC published 5 Ps that Aren’t Pandemic report, hosted a webinar on retail strategies and planning for recovery, and released Location Analytics RFP
Retail districts from the region’s four Core Cities added to analysis to ensure an equitable approach to recovery

**Winter 2021**
Buxton presents findings and data dashboard for 23 former Classic Towns
DVRPC combines location analytics with retail inventory, identifies relationship between downtown diversity and the pandemic’s impact on 75 of the region’s downtowns

**June 2021**
DVRPC will hold Breaking Ground Technical Assistance Webinar and host panel to discuss economic recovery for Greater Philadelphia’s retail districts and downtowns
## Location Analytics Data | 75 Downtowns

### New Jersey

**Burlington County**
- Bordentown City
- Burlington City
- Maple Shade Township
- **Moorestown Township**
- Mount Holly Township
- Palmyra Borough
- Riverside Township
- **Riverton Borough**

**Camden County**
- Audubon Borough (Merchant St.)
- Barrington Borough
- Berlin Borough
- Camden City (Federal Street)
- **Collingswood Borough**
- Haddon Heights Borough
- Haddon Township (Westmont)
- Laurel Springs Borough
- **Merchantville Borough**
- Pennsauken Township
- Pine Hill Borough

**Gloucester County**
- Glassboro Borough
- Gloucester City
- Harrison Township (Mullica Hill)
- Paulsboro Borough
- Pitman Borough
- Swedesboro Borough
- Wenonah Borough
- Westville Borough
- **Woodbury City**

**Mercer County**
- Hightstown Borough
- Princeton
- Trenton (State Street)

### Pennsylvania

**Bucks County**
- Bristol Borough
- Doylestown Borough
- Langhorne Borough
- Morrisville Borough
- **New Hope Borough**
- Newtown Borough
- Perkasie Borough
- Sellersville Borough
- **Quakertown Borough**
- Yardley Borough

**Chester County**
- Coatesville City
- Downingtown Borough
- **Kennett Square Borough**
- Malvern Borough
- Phoenixville Borough
- **West Chester Borough**

**Delaware County**
- Chester City (Avenue of the States)
- Darby Borough
- East Lansdowne Borough
- Haverford Township (Brookline)
- Haverford Township (Oakmont)
- Lansdowne Borough
- Marcus Hook Borough
- **Media Borough**
- Norwood Borough
- **Radnor Township (Wayne)**
- Ridley Park Borough
- Swarthmore Borough
- Upper Darby Township

**Montgomery County**
- Ambler Borough
- Cheltenham Township (Glenside)
- Hatboro Borough
- Jenkintown Borough
- Lansdale Borough
- **Lower Merion Township (Ardmore)**
- Lower Merion Township (Bryn Mawr)
- Lower Merion Township (Haverford)
- Narberth Borough
- Norristown Borough
- Pottstown Borough
- Souderton Borough
- Telford Borough

**Philadelphia County**
- 52nd Street

*Former Classic Towns analyzed by Buxton Co. as part of the location analytics contract.*
Of the 75 downtowns for which DVRPC purchased geolocation data, Buxton conducted an analysis of and developed a data dashboard for these 23 downtowns:

**New Jersey**
- Burlington County
  - Bordentown City
  - Moorestown Township
  - Riverton Borough
- Camden County
  - Collingswood Borough
  - Haddon Heights Borough
  - Merchantville Borough
- Gloucester County
  - Glassboro Borough
  - Woodbury City

**Pennsylvania**
- Bucks County
  - Bristol Borough
  - Doylestown Borough
  - New Hope Borough
  - Quakertown Borough
- Chester County
  - Kennett Square Borough
  - Phoenixville Borough
  - West Chester Borough
- Delaware County
  - Media Borough
  - Radnor Township (Wayne)
- Montgomery County
  - Ambler Borough
  - Cheltenham Township (Glenside)
  - Jenkintown Borough
  - Lansdale Borough
  - Lower Merion Township (Ardmore)
  - Souderton Borough
Visits to the 23 downtowns were separated into three distinct time periods:

1. **Pre-Pandemic**
   - December 1, 2019 through March 13, 2020

2. **Economic Shutdown**
   - March 14, 2020 through June 15, 2020

3. **Economic Reopening**
   - June 16, 2020 through November 30, 2020
Buxton’s Analysis | Trade Area Impacts

Trade areas are defined as the time (in minutes) that 75% of a downtown’s visitors are willing to drive to get to the downtown.

Buxton found that the average trade area for the 23 downtowns was:

<table>
<thead>
<tr>
<th>Pre-Pandemic</th>
<th>Economic Shutdown</th>
<th>Economic Reopening</th>
</tr>
</thead>
<tbody>
<tr>
<td>41 Minutes</td>
<td>31 minutes</td>
<td>36 minutes</td>
</tr>
</tbody>
</table>

25% decrease  16% increase
Consumer profiles are used to understand the characteristics, behaviors, and interests of current and potential visitors to the downtowns in order to better plan for consumer growth and retention.

In order to develop consumer profiles for visitors to the region's downtowns, Buxton used Experian's Mosaic segmentation.

Mosaic divides the U.S. population into 19 Groups and 71 more detailed types, which are described on subsequent slides and are delineated as follows:

- Greyed out text indicates this type was not a core consumer for the 23 downtowns pre-pandemic.
- Blue text indicates the type was a core consumer for the 23 downtowns pre-pandemic.
**Buxton’s Analysis | Consumer Profile Group A**

**Segment A01: American Royalty**
Affluent, influential and successful couples and families living in prestigious suburbs

**Segment A02: Platinum Prosperity**
Wealthy and established empty-nesting couples residing in suburban and in-town homes

**Segment A03: Kids and Cabernet**
Prosperous, middle-aged married couples with children living child-focused lives in affluent suburbs

**Segment A04: Picture Perfect Families**
Established families of child-rearing households living in wealthy suburbs

**Segment A05: Couples with Clout**
Middle-aged, childless couples living in affluent metro areas

**Segment A06: Jet Set Urbanites**
Upscale singles and couples living high-rise fashionable lives; city-style
Buxton’s Analysis | Consumer Profile Group B

**Segment B07: Across the Ages**
Flourishing couples and multi-generational families living a wide range of lifestyles in suburbia

**Segment B08: Babies and Bliss**
Middle-aged couples with large families and active lives in affluent suburbia

**Segment B09: Family Fun-tastic**
Upscale, middle-aged families with older children pursuing busy kid-centered lives in satellite cities

**Segment B10: Cosmopolitan Achievers**
Affluent middle-aged and established couples and families enjoying dynamic lifestyles in metro areas
Buxton’s Analysis | Consumer Profile Group C

Segment C11: Sophisticated City Dwellers
Wealthy boomer-aged couples living in cities and closed-in suburbs

Segment C12: Golf Carts and Gourmets
Thriving retirees and empty-nesters in comfortable communities

Segment C13: Philanthropic Sophisticates
Mature, upscale couples and singles in suburban homes

Segment C14: Boomers and Boomerangs
Baby boomer adults and their teenage/young adult children sharing suburban homes
Buxton’s Analysis | Consumer Profile Group D

Segment D15: Sports Utility Families
Upscale, middle-aged couples with school-aged children living active family lifestyles in outlying suburbs

Segment D16: Settled in Suburbia
Upper middle-class diverse family unites and empty nesters living in established suburbs

Segment D17: Cul De Sac Diversity
Cultured families settled in new suburban neighborhoods

Segment D18: Suburban Nightlife
Upper established couples and families living mainly in the expanding suburbs
Buxton’s Analysis | Consumer Profile Groups E & F

**Segment E19: Consummate Consumers**
Households with adult children in an upper-middle class lifestyle with discretionary income living sophisticated lifestyles

**Segment E20: No Place Like Home**
Upper middle-class multi-generational households in exurban areas

**Segment E21: Unspoiled Splendor**
Comfortably established baby boomer couples in town and country communities

**Segment F22: Fast Track Couples**
Active, young, upper middle-class suburban couples and families living upwardly-mobile lifestyles

**Segment F23: Families Matter Most**
Young, middle-class families in scenic suburbs leading active, family-focused lives
Buxton’s Analysis | Consumer Profile Groups G & H

Segment G24: Ambitious Singles
Youthful, cutting-edge singles living in mid-scale metro areas balancing work and leisure lifestyles

Segment G25: Urban Edge
Lively, up-and-coming singles living big city lifestyles located within top MSA markets

Segment H26: Progressive Assortment
Mature couples with comfortable and active lives in established suburbs

Segment H27: Life of Leisure
Upper established couples living leisure lifestyles in small towns and cities

Segment H28: Everyday Moderates
Mid-scale, multi-cultural couples and families living in mid-tier metro suburban settings

Segment H29: Destination Recreation
Middle-aged, midscale couples in rural towns and fringe suburbs working to enjoy their active lifestyles
Buxton’s Analysis | Consumer Profile Group I

Segment I30: Potlucks and the Great Outdoors
Comfortably established, middle-income couples with children living in suburbia

Segment I31: Hard Working Values
Established families in smaller cities and towns with solid blue-collar jobs

Segment I32: Steadfast Conventionalists
Conventional Generation X families located in selected coastal city homes

Segment I33: Balance and Harmony
Middle-class families living lively lifestyles in city-centric neighborhoods
Buxton’s Analysis | Consumer Profile Group J

Segment J34: Suburban Sophisticates
Established sophisticates living comfortable suburban lifestyles

Segment J35: Rural Escape
Sophisticated, established couples and singles living comfortable lives in rural towns

Segment J36: Settled and Sensible
Mature, established couples with adult children and singles in suburban and rural neighborhoods
Buxton's Analysis | Consumer Profile Group K

**Segment K37: Wired for Success**
Young, mid-scale singles and couples living socially-active city lives

**Segment K38: Modern Blend**
Comfortably established singles and couples living suburban lifestyles

**Segment K39: Metro Fusion**
Ethnically-diverse, middle-aged singles living urban active lifestyles

**Segment K40: Bohemian Groove**
Mature, unattached individuals enjoying settled urban lives
Buxton’s Analysis | Consumer Profile Groups L & M

Segment L41: Booming and Consuming
Older empty-nesting couples and singles enjoying relaxed lives in small towns

Segment L42: Rooted Flower Power
Mid-scale baby boomer singles and couples rooted in established suburban communities and approaching retirement

Segment L43: Homemade Happiness
Lower middle-class baby boomer households living in remote town and country homes

Segment M44: Creative Comfort
Rural families with modest incomes and diverse household dynamics

Segment M45: Growing and Expanding
Young, working-class families and single parent households living in small established, city residences
Buxton’s Analysis | Consumer Profile Group N

Segment N46: True Grit Americans
Older, middle-class households in town and country communities located in the nation’s midsection

Segment N47: Countrified Pragmatics
Lower middle-income couples and singles living rural, casual lives

Segment N48: Rural Southern Bliss
Lower middle-income multi-generational families living in small towns

Segment N49: Touch of Tradition
Working-class, middle-aged couples and singles living in rural homes
Buxton’s Analysis | Consumer Profile Group O

**Segment 050: Full Steam Ahead**
Younger and middle-aged singles gravitating to second-tier cities

**Segment 051: Digitally Savvy**
Young singles who live digital-driven smaller city lifestyles

**Segment 052: Urban Ambition**
Mainly Generation Y African-American singles and single families established in mid-market cities

**Segment 053: Colleges and Cafes**
Young singles and recent college graduates living in college communities

**Segment 054: Influenced by Influencers**
Young singles living in Midwest and Southern city centers

**Segment 055: Family Troopers**
Families and single-parent households living near military bases
Buxton’s Analysis | Consumer Profile Group P

Segment P56: Mid-scale Medley
Middle-aged, mid-scale unattached adults living in secondary cities

Segment P57: Modest Metro Means
Mid-scale singles established in inner-city communities

Segment P58: Heritage Heights
Singles and families with mid and low incomes living settled lives in urban apartments

Segment P59: Expanding Horizons
Middle-aged, mid-scale income families living mainly within US border cities

Segment P60: Striving Forward
Cultured families and single parents earning modest incomes in gateway communities

Segment P61: Simple Beginnings
Singles and single parent households with modest incomes in city apartments
Buxton’s Analysis | Consumer Profile Groups Q & R

Segment Q62: Enjoying Retirement
Relaxed, retired couples and widowed individuals in suburban homes living quiet lives

Segment Q63: Footloose and Family Free
Elderly couples and widowed individuals living active and comfortable lifestyles

Segment Q64: Established in Society
Stable, sophisticated seniors living in older homes and leading sedentary lifestyles

Segment Q65: Mature and Wise
Retirees settled in metro apartment communities living cost-effective, sensible lives

Segment R66: Ambitious Dreamers
Lively singles and single-parents with cost-conscious mindsets starting out in city apartments

Segment R67: Passionate Parents
Young, single parents with cost-conscious mindsets in second-city apartments
Buxton’s Analysis | Consumer Profile Group S

Segment S68: Small Town Sophisticates
Sophisticated, down-scale singles and couples with adult children living in modest, exurban small towns

Segment S69: Urban Legacies
Cultured singles and single parents established in modest urban settings

Segment S70: Thrifty Singles
Middle-aged singles with limited income in transitional small town and exurban apartments

Segment S71: Modest Retirees
Mature singles with limited income typically concentrated in inner-city apartments
Buxton's Analysis | Pre-Pandemic Consumer Profile

- **Primary Core Visitors**: Segment groups whose share of visits was actually larger than their share of the trade area’s total population.
- **Secondary Core Visitors**: Segment groups whose share of visits was equal to their share of the trade area’s total population.
- **Tertiary Core Visitors**: Segment groups who are less likely to visit, but represent an opportunity for growth.

February 2021
Buxton's Analysis | Economic Shutdown Consumer Profile

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Segment group's share of the trade area's total population.
Buxton's Analysis | Reopening Consumer Profile

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Buxton's Analysis

Reopening Consumer Profile

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Segment group's share of the trade area's total population.
Buxton’s Analysis | Data Dashboard

Buxton developed a data dashboard for the 23 downtowns, which provides the following interactive charts and maps for the three time periods on which they conducted their analysis:

1. **Zip Code Map**
   - Volume of visits to the downtown by zip code from which they came

2. **Trade Area Map**
   - Drive time trade area is the distance from which 75% of the downtown’s visits came

3. **Downtown Boundaries**
   - Provides the downtown boundaries over an aerial image

4. **Consumer Profiles**
   - A bar chart showing the downtown's Primary, Secondary, and Tertiary Core Visitors

5. **Visits by Month**
   - A bar chart that provides a breakdown of visits by month

As an example, the following slides highlight and provide a summary of Phoenixville’s dashboard.

The dashboard file can be downloaded from DVRPC’s COVID-19 Resources page.
Economic Shutdown Visits to Phoenixville

Profiles by Timeframe

% of Visits by Month
Economic Reopening Period Visits to Phoenixville

Profiles by Timeframe

District Polygon (Phoenixville Borough)

% of Visits by Month

February 2021
Some key findings from Phoenixville’s interactive dashboard are:

1. **Zip Code Map**
   - The following zip codes generated the most visits:
     - Pre-Pandemic: 19403, 19426, 19453, 19460, 19464, 19465, 19468, & 19475
     - Shutdown: 19460
     - Reopening: 19460

2. **Trade Area Map**
   - The trade area for Phoenixville was 41 minutes before the pandemic.
   - During the shutdown the trade area shrunk by 24% down to 31 minutes, and recovered 16% during the reopening to 36 minutes.

3. **Downtown Boundary**
   - The boundary graphic is not interactive, but for Phoenixville it does show that the Phoenix Village mixed-use development was added to the downtown since the 2013 retail inventory was done.

4. **Consumer Profiles**
   - The greatest share of visits came from the following profiles:
     - Pre-Pandemic: 11.01% of visitors were from the A01 (American Royalty) segment
     - Shutdown: 8.31% of visitors were from the K40 (Bohemian Groove) segment
     - Reopening: 10.53% of visitors were from the A01 segment

5. **Visits by Month**
   - Between December 2019 and October 2020, the greatest share of visits came in December at nearly 17.5%.
   - Only 5.2% of visits occurred during April, and June saw the greatest share of visits during the reopening period with a share of 7.8% of all visits.
DVRPC’s Analysis | All 75 Downtowns

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.
## DVRPC’s Analysis | All 75 Downtowns

### 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>Cars</th>
<th>Colleges</th>
<th>Goods &amp; Services</th>
<th>Transit</th>
<th>Vacancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-oriented downtowns with lower Walk Scores and more cars per household were more impacted by the pandemic.</td>
<td>Downtowns that are overly-reliant on these anchor institutions were less resilient during the pandemic.</td>
<td>As the share of Neighborhood Goods &amp; Services (NGS) retailers increased in a downtown, so did the pandemic’s impact.</td>
<td>The pandemic significantly reduced transit ridership, and this impact had a ripple effect in transit-oriented downtowns.</td>
<td>The pandemic had a greater impact as downtown vacancy rates increased.</td>
</tr>
</tbody>
</table>
DVRPC’s Analysis | All 75 Downtowns

Summary:

**Diverse Downtowns** were less impacted by the shutdown, and were more resilient during reopening.
Continuing the Conversation

**Social Media Campaign | Diverse Downtowns**
March-May 2021

One year into the pandemic’s economic fallout, the Diverse Downtowns campaign will present to the public DVRPC's findings regarding the characteristics that both reduced and exacerbated the pandemic’s impact, and a detailed snapshot of Greater Philadelphia’s 10 least impacted downtowns.

**DVRPC Website | Update to the COVID-19 Resources Page**
May 2021

The Buxton Company's findings and data dashboard, as well as DVRPC's findings for all 75 downtowns, will be made available on the COVID-19 Resources page by the conclusion of the social media campaign.

**Breaking Ground 2021 | Supporting Downtown Recovery**
June 2021

Not all of Greater Philadelphia’s retail districts and downtowns were equally impacted by the pandemic.

A panel will discuss how to leverage lessons learned to ensure that the region's downtowns are more resilient to future economic upsets and better able to capitalize upon rising trends within the retail industry.