5 P's that Aren't Pandemic ▪ Location Analytics ▪ Diverse Downtowns ▪ Breaking Ground 2021

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

February 2021

DELAWARE VALLEY dvrpc REGIONAL PLANNING COMMISSION

Background and Next Steps

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

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

2019
Classic Towns program discontinued

Winter 2020
DVRPC began up-dating retail district inventory

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

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

Fall 2020
DVRPC executes location analytics contract with Buxton Co.

Retail inventory update complete

Location analytics begins

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

March 2021
One year into the pandemic:

DVRPC launches *Diverse Downtowns* social media campaign

Reports findings to partners

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)
Haddonfield Borough
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)

***Former Classic Towns analyzed by Buxton Co. as part of the location analytics contract.**

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

Buxton's Analysis | 23 Downtowns

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

Buxton's Analysis | Three Time Periods

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:

Pre-Pandemic	Economic Shutdown	Economic Reopening
41 Minutes	**31 minutes**	**36 minutes**

25% decrease **16% increase**

Buxton's Analysis | Consumer Profiles

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 O50: Full Steam Ahead

Younger and middle-aged singles gravitating to second-tier cities

Segment O51: Digitally Savvy

Young singles who live digital-driven smaller city lifestyles

Segment O52: Urban Ambition

Mainly Generation Y African-American singles and single families established in mid-market cities

Segment O53: Colleges and Cafes

Young singles and recent college graduates living in college communities

Segment O54: Influenced by Influencers

Young singles living in Midwest and Southern city centers

Segment O55: 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

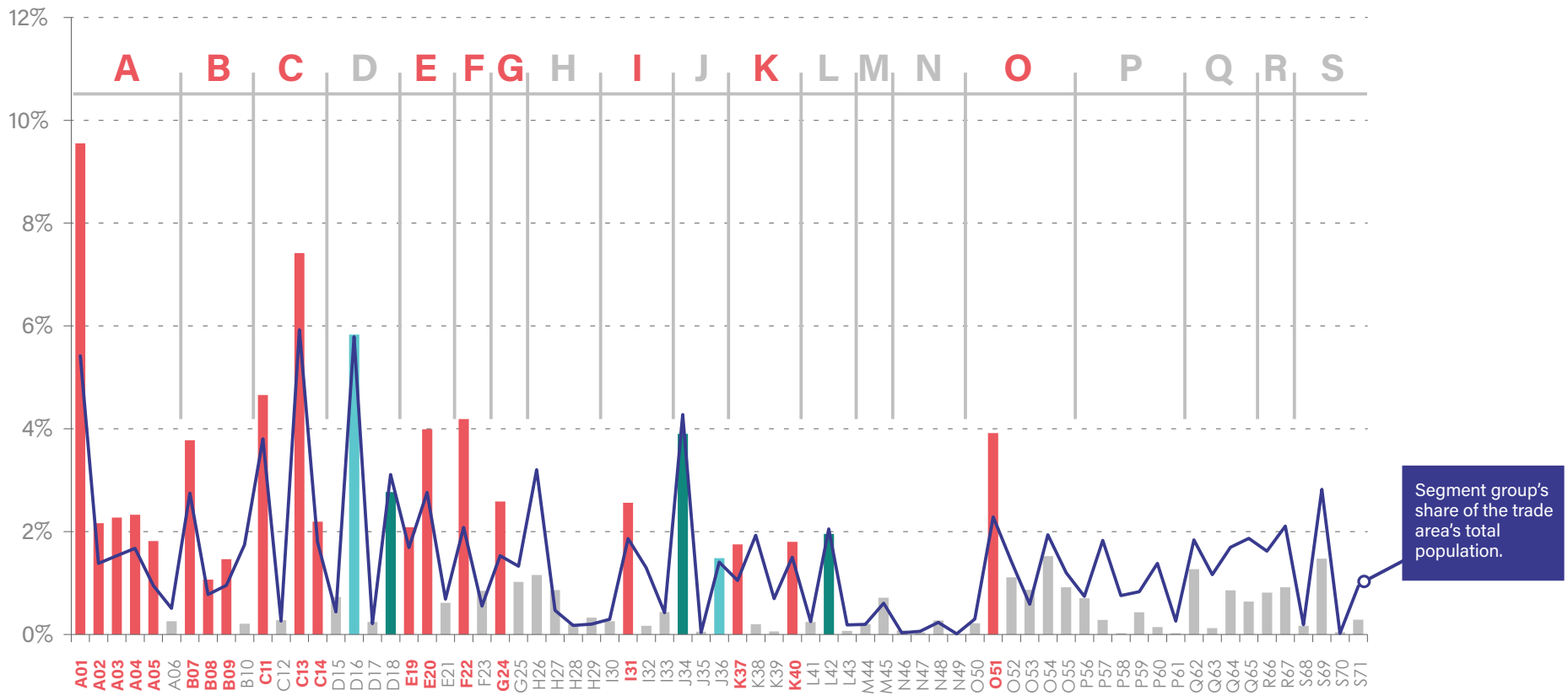
Mature singles with limited income typically concentrated in inner-city apartments

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.

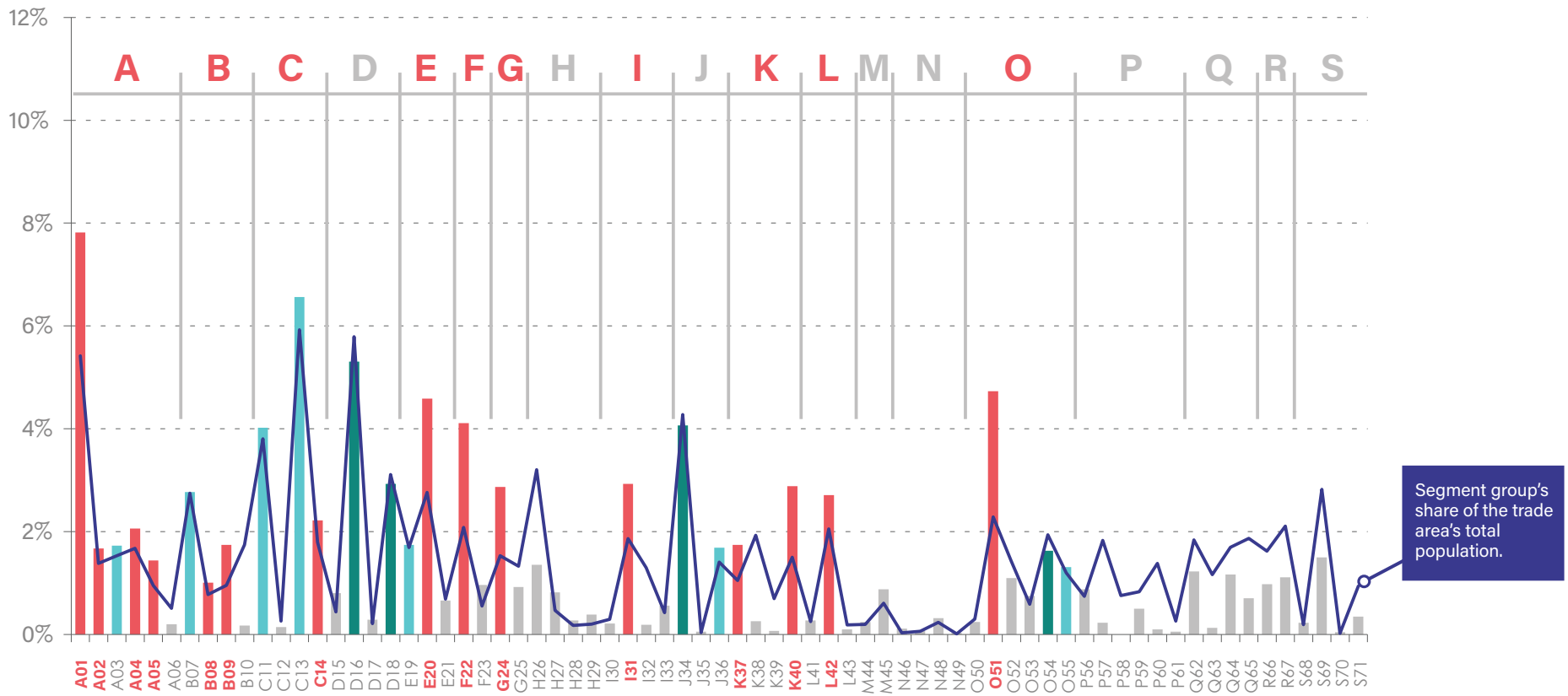


Buxton's Analysis | Economic Shutdown Consumer Profile

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.

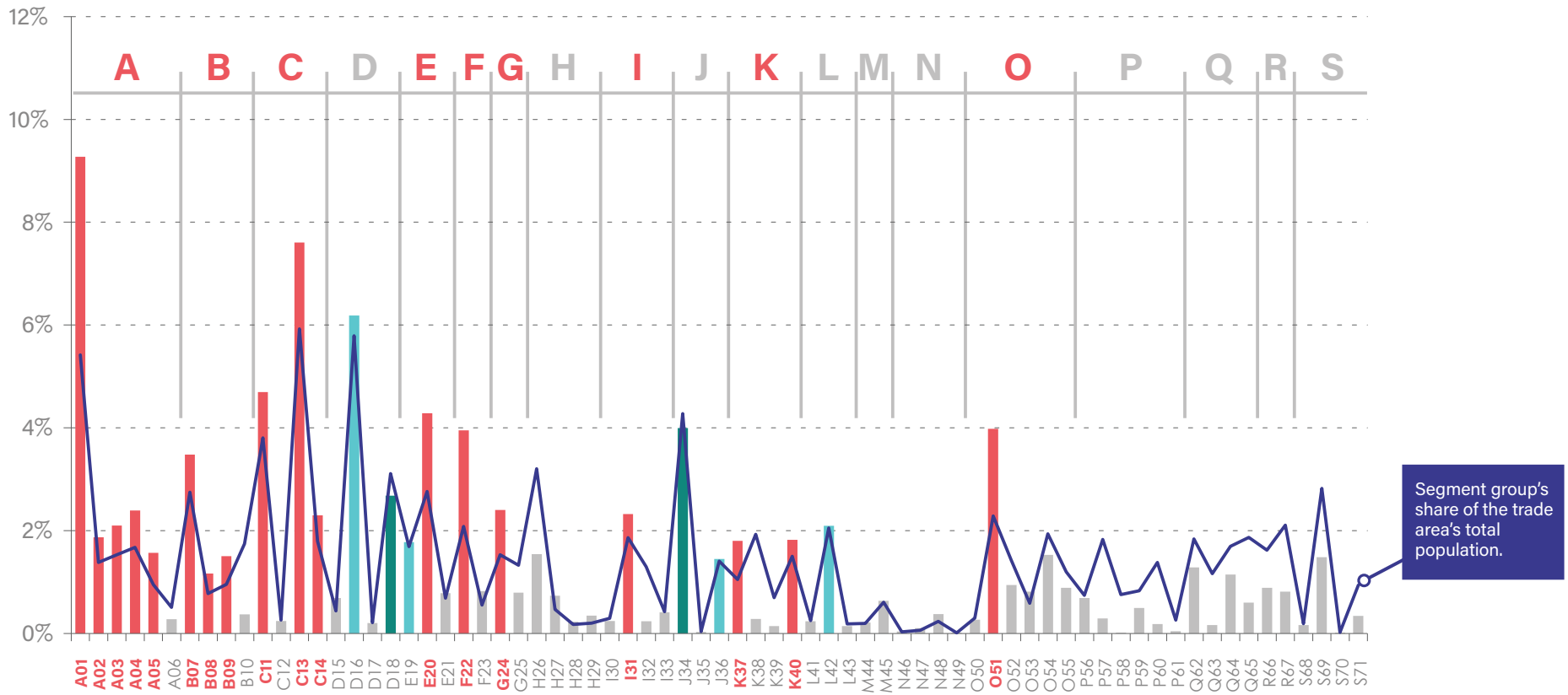


Buxton's Analysis | Reopening Consumer Profile

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.



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

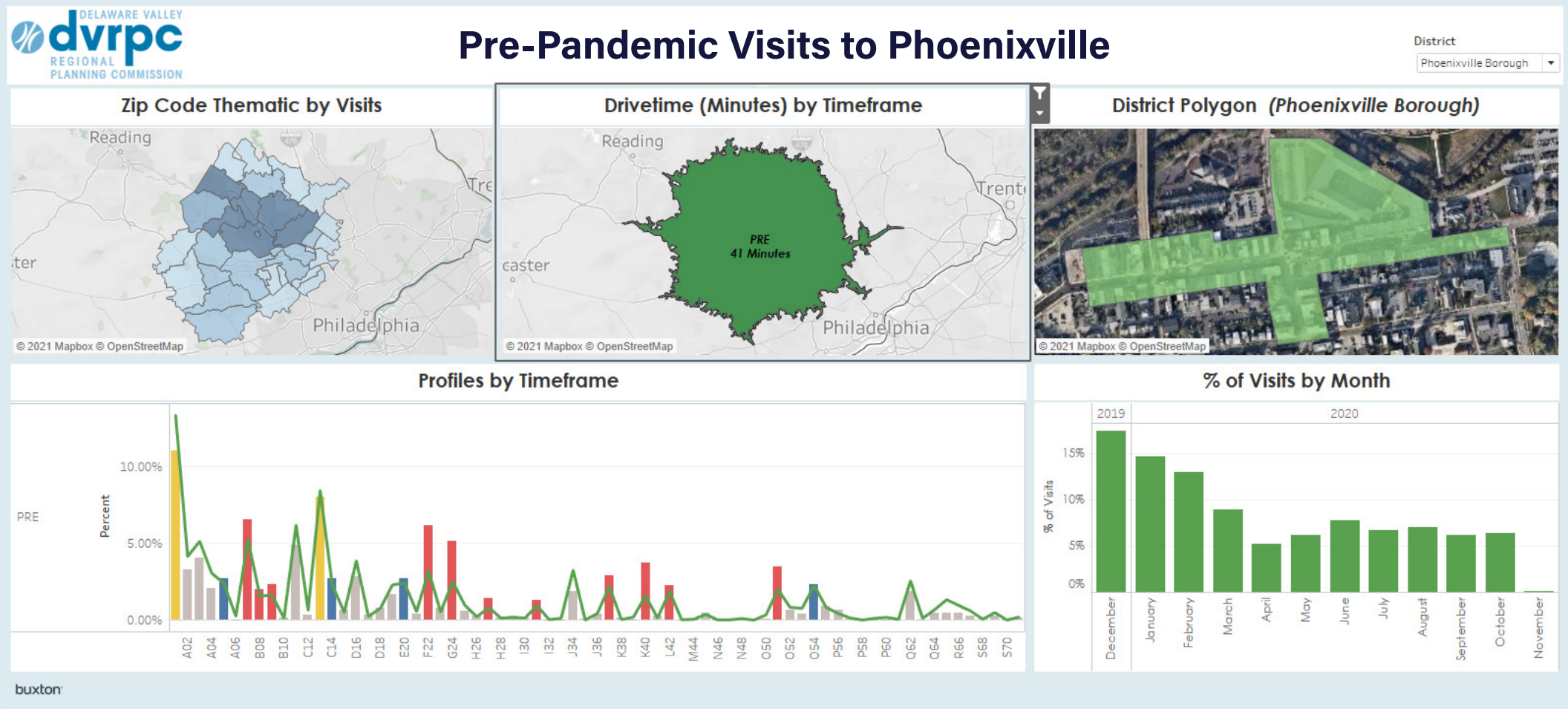
4. **Consumer Profiles**
   A bar chart showing the downtown's Primary, Secondary, and Tertiary Core Visitors

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

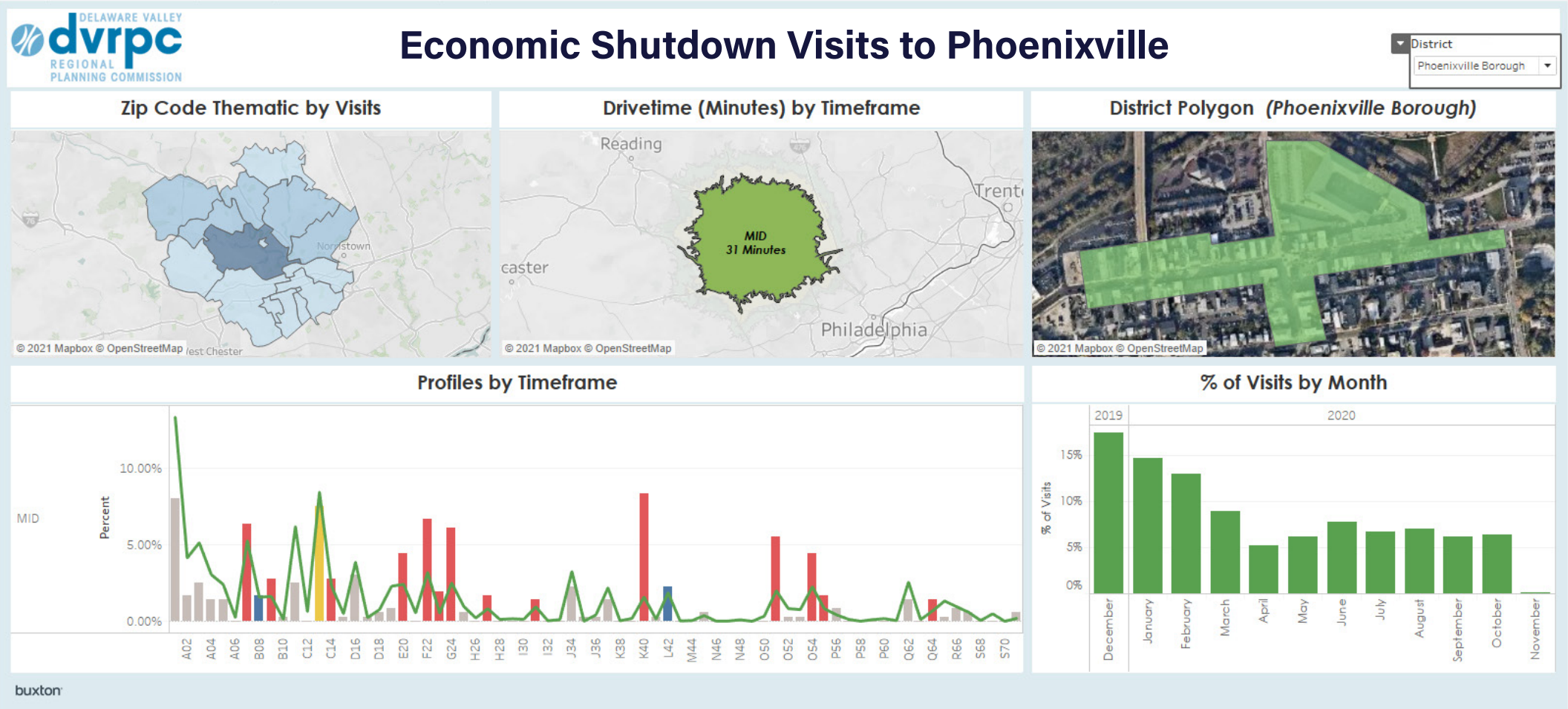
As an exmaple, the following slides highlight and provide a summary of Phoenixville's dashboard.

The dashboard file can be downloaded from DVRPC's COVID-19 Resources page.

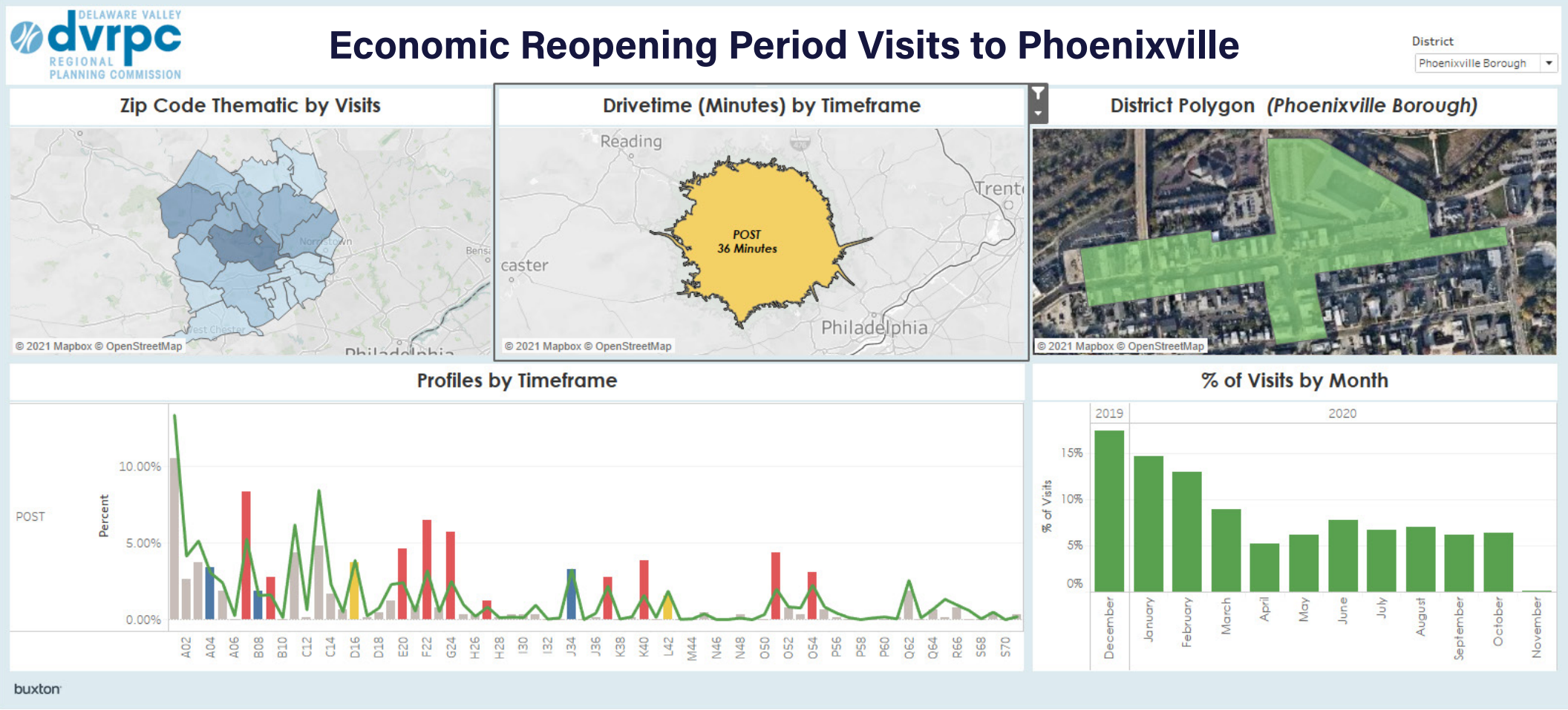
Buxton's Analysis | Data Dashboard Example



Buxton's Analysis | Data Dashboard Example



Buxton's Analysis | Data Dashboard Example



Buxton's Analysis | Data Dashboard Example

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 shrank 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:

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.

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.