



CENTER CITY REPORTS

Survey of Restaurants and Retailers: Use of Outdoor Space

JUNE 2020

CENTER CITY DISTRICT,
CENTRAL PHILADELPHIA DEVELOPMENT CORPORATION

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The Center City District (CCD) surveyed restaurants and retailers in Center City to understand their need for expanded use of outdoor space to facilitate business reopening. Philadelphia's narrow sidewalks and streets in our prime retail areas help create an intimate-scale, walkable city, but they also create challenges when trying to accommodate multiple needs. These survey results can assist in the effort to balance more outdoor seating and queuing areas with the need to preserve appropriate room for pedestrians and vehicles.

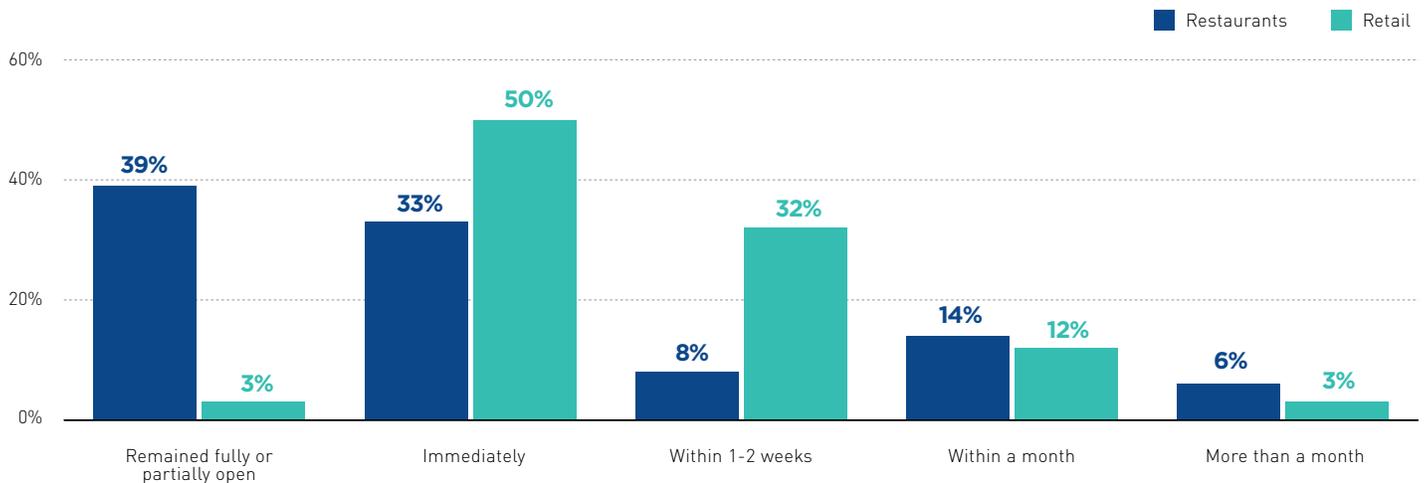
On May 26, the CCD sent a SurveyMonkey email to 298 businesses within CCD boundaries. The survey was also distributed to members of the Rittenhouse Row, Midtown Village and Jewelers' Row District business associations, the management of the Fashion District, East Market, The Lits Building and three other major property owners with a significant number of retail tenants. Reminders were sent on May 28 and May 29. As of June 3, CCD received 83 responses from individuals **representing 126 separate businesses**. Some of the responses were from owners of multiple sites, some of which are located outside the CCD boundaries but in other areas of Center City. Since their answers corresponded closely to the overall sample of respondents, they are included in the results. Of the **83 respondents, 49 were restaurants and 34 were retailers**.

Approximately one-fourth (**24%**) of survey respondents have remained fully or partially open during the pandemic. Among **restaurants, 39% remained open**, while nearly all of the retailers responding to the survey were closed. Among those businesses that are not currently open, **more than half (52%) plan to open for business immediately** after state and city restrictions on non-essential business are lifted, while 24% plan to open within 1-2 weeks after the restrictions end. The remaining 24% envision a somewhat longer reopening timetable.

90% of restaurants and 85% of retailers are making interior changes to their businesses to accommodate social distancing upon reopening. To compensate, many are looking to use outdoor spaces for shopping and dining and to facilitate pickup or delivery; 75% of respondents agree that it would be beneficial to have a designated portion of the parking lane on their block reserved for delivery and curbside pickup.

71% of businesses support time-limited prohibition of cars in the adjacent street or nearby alley to allow for outdoor seating or pickup. Those who supported this suggestion were asked to indicate which blocks they would like to see closed. Among the most widely suggested locations were portions of Walnut Street, Filbert Street, 13th Street, 18th Street and Samson Street.

Q1. If you have been closed, how quickly are you planning to reopen to customers when allowed by City and State government?



Many Center City restaurants and retailers report that they are currently conducting business through delivery or by providing takeout, and they expect to continue to do so after business restrictions are lifted. Fifty-seven percent of restaurants and 26% of retailers are currently making deliveries. Curbside pickup is offered by 49% of restaurants and 21% of retailers, and 67% of restaurants provide takeout. **Nearly all restaurants (93%) and most retailers (85%) who are currently offering delivery, takeout, or curbside pickup expect to continue to do so after business is reopened.**

In a follow-up phone survey of about 20 restaurants in the core of the downtown, the business representatives indicated that during the last several months **66% of customers, who came for pickup, walked**, 29% drove and 5% came by bike. These same businesses

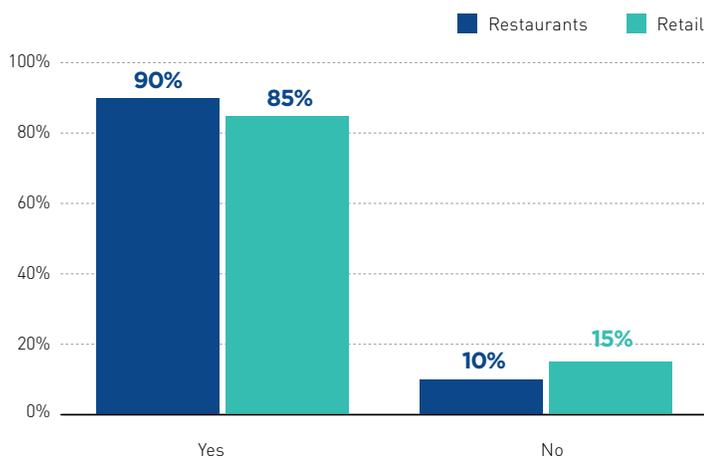
indicated that of the deliveries they initiated, 48% were delivered by car and 52% were delivered by bike. These results suggest that for restaurants pedestrian uses for the public spaces can take greater priority. However, retailers selling larger merchandise still may need vehicular access for pick-up if they do not have dedicated parking. It will also be important to plan on mixed-use blocks for the office, hotel and residential properties that may still require auto drop off and pick up. (The CCD has already begun detailed planning on several blocks of 13th and 18th streets in partnership with the adjacent businesses.)

Businesses were asked about potential uses of sidewalk space after reopening. Among restaurants, outdoor seating was the most common response, with **63% of those who already offered outdoor seating hoping to expand seats, and 27% of establishments without an outdoor option hoping to create it.** Nearly half (48%) of restaurants would use sidewalk space for pickup or delivery service, and 44% for customer waiting lines. Other possible uses of the sidewalk for restaurants included a transactional table or podium (29%), sanitation station (17%), and signs (10%).

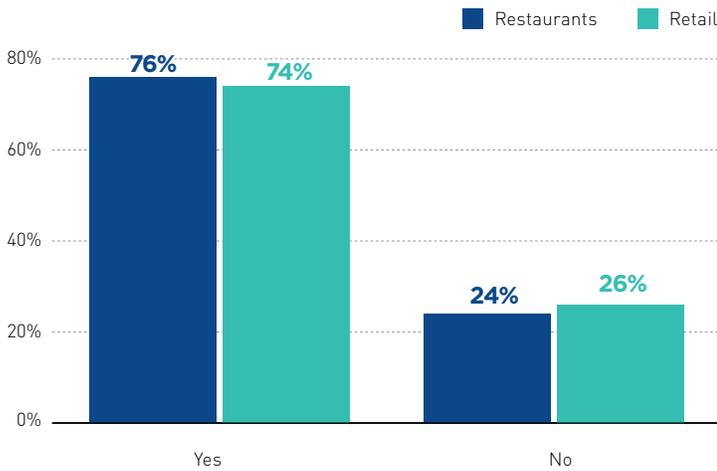
The most common potential uses of sidewalk space cited by retailers were for waiting lines (65%) and order pickup (58%). Other possible uses for retailers were directional signs (32%), merchandise displays or sidewalk sales (26%), sanitation stations (19%), transactional table or podium (13%), and bike parking (16%).

In the open response section of the survey, many businesses indicated the importance of outdoor space for their business as a way to compensate for reductions in revenue that will result from social distancing requirements and other restrictions related to COVID-19. They also cited various practical concerns that ranged from existing uses of space outside their business, the potential need to allocate space on closed streets to different businesses, the need for short-term parking and parking enforcement, police presence, and the need for clarity around safety requirements.

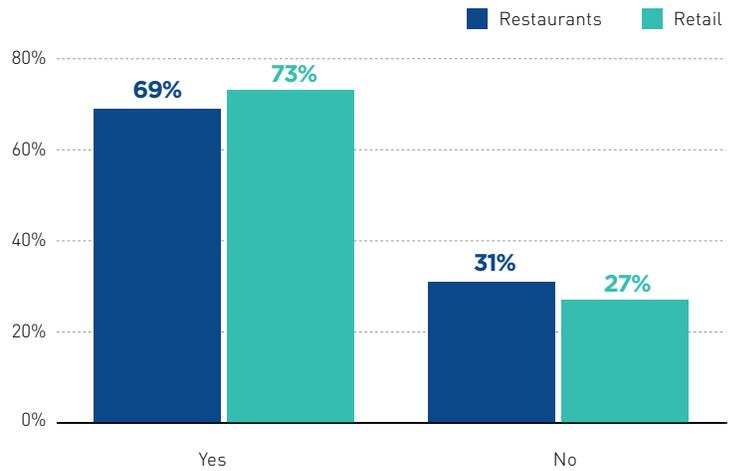
Q2. Are you making changes to the interior of your premises to enable greater social distance or accommodate potential new limits on how many customers you can serve or seat?



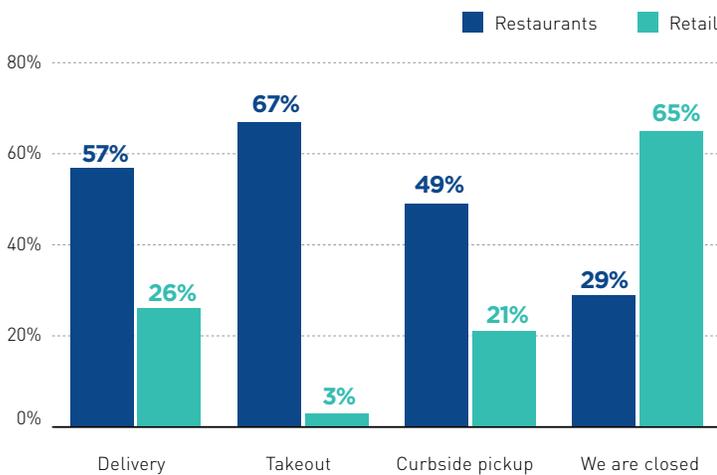
Q3. Would it be beneficial to have a designated portion of the parking lane on your block reserved to accommodate delivery and curbside pickup?



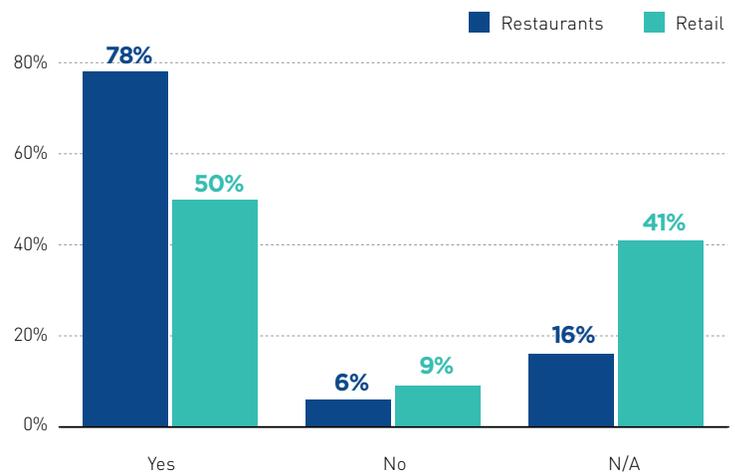
Q4. Would you support time-limited prohibition of cars in the adjacent street or nearby alley to create room for outdoor seating, order pickup, or other purposes to promote customer safety?



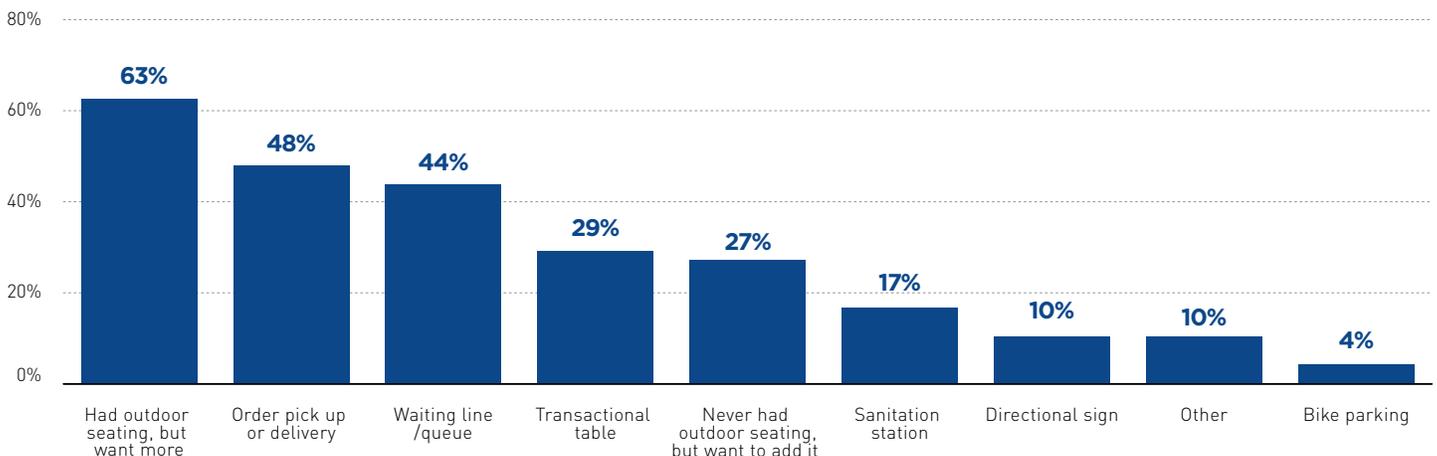
Q5. Are you currently offering delivery, takeout and/or curbside pickup? (check all that apply.)



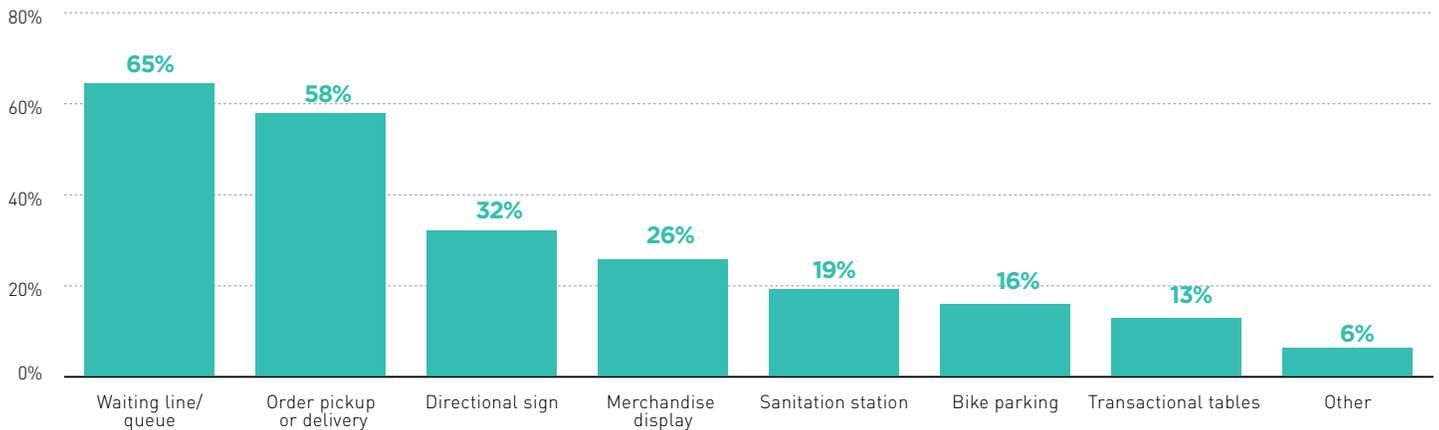
Q6. Do you plan to continue to offer delivery, takeout and/or curbside pickup, once your business has fully reopened?



Q7. Restaurateurs: If your restaurant has the opportunity to use outdoor space on the sidewalk, what would be the primary use(s)?



Q8. Retailers: If you have the opportunity to expand your premises onto the sidewalk, what would be the primary use?



Restaurants and retailers in Center City indicate that the ability to use outdoor space for seating and curbside pickup will help compensate for reductions in seating and floor area due to social distancing.

