



## CENTER CITY REPORTS

# Reopening Restaurants and Retail: The Customer Perspective

JUNE 2020

CENTER CITY DISTRICT,  
CENTRAL PHILADELPHIA DEVELOPMENT CORPORATION

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The period of recovery for restaurants and retail will be slow and gradual, based on publicly mandated reopening guidelines and customer concerns about the coronavirus. The City of Philadelphia can assist by expanding the ways public spaces on sidewalks and in streets can be used during the warm weather months as the reopening accelerates.

At the beginning of 2020, restaurants, food service and retail provided 103,946 jobs citywide, accounting for 15% of the total employment in Philadelphia. In Greater Center City, these sectors account for 39,600 jobs, 13% of all jobs in the downtown.

The overwhelming majority of these jobs were temporarily lost due to the state- and city-mandated shutdown in response to the global pandemic. To gather information that can assist businesses as they begin to reopen and restore employment, Center City District (CCD) distributed via email a survey to determine respondents' purchasing patterns during the shutdown and the factors that will make them most likely to return to restaurants and shops as the reopening gains momentum.

CCD emailed a SurveyMonkey questionnaire directly to 17,000 residents who live between Girard Avenue and Tasker Street, river to river, and forwarded it for redistribution to several Greater Center City civic associations and to the managers of downtown residential

apartment and condominium buildings. The survey was completed by 1,910 respondents from June 8 to June 15 with responses equally distributed between residents of core Center City, the four ZIP codes between Vine and Pine streets, and extended Center City, ZIP codes 19123, 19130, 19146 and 19147.

## FINDINGS ON RESTAURANTS

Based on a separate survey of restaurants distributed by CCD in the first week of June, 39% had remained open since March to provide take-out.<sup>1</sup> Respondents to the *customer* survey indicated that prior to the shutdown **68% rarely relied** on such services. After the stay-at-home order, 22% made take-out purchases several times per week and 52% made such purchases a few times per month. Only 26% reported rarely or never purchasing by take-out. The group who said they rarely or never purchased take-out skewed older with 39% of those over 65 responding this way, compared to just 17% of those under age 25.

During the stay-at-home period, residents relied primarily on their neighborhood businesses with **76% walking to pick up their meals**, while 29% relied on a car, taxi, Uber, or Lyft, and 5% biked.<sup>2</sup> For customers who had meals delivered, 86% reported delivery by car, 61% received delivery by bike and 17% reported deliveries made on foot.

1: Survey of Restaurants and Retailers: Use of Outdoor Space, CCD June 2020  
[www.centercityphila.org/research-reports/survey-of-restaurants-and-retailers-use-of-outdoor-space](http://www.centercityphila.org/research-reports/survey-of-restaurants-and-retailers-use-of-outdoor-space)

2: Respondents were asked to note all the ways that they picked-up food, so responses add up to more than 100%, with walking being the most frequent response.

At this point, customers expect to come back to restaurants gradually: 20% indicated they would dine out immediately upon reopening with 20% returning within the first two weeks. Another 15% expect to dine out within the first three to four weeks, 24% after a month, and 21% will wait at least two months. Those over 65 indicated they would return to restaurants more slowly than those in their 20s and 30s.

More than six in 10 respondents expect to *dine out less* than they used to, and just 4% expect to dine out more than they did before the pandemic; only 34% expect to dine out as much as they used to prior to the pandemic.

Take-out service will remain important: 18% expect that after restaurants reopen, they will rely on take-out more than they did before the stay-at-home order, while 50% expect to rely on take-out meals as much as they used to.

Respondents were asked to select from a long list of actions that would increase their comfort level and make it more likely that they would come back to restaurants. In descending order of importance, they ranked as follows:

<b>86%</b> tables spaced at least six feet apart.	<b>63%</b> signage about maintaining social distance
<b>84%</b> servers, hosts and bartenders wearing masks	<b>61%</b> kitchen staff wearing gloves
<b>83%</b> health safety training for staff	<b>61%</b> signage about wearing masks
<b>82%</b> kitchen staff wearing masks	<b>58%</b> contactless payment
<b>81%</b> limits on the numbers of diners	<b>48%</b> floor signage designating proper social distance
<b>70%</b> diners wearing masks when entering or leaving the restaurant or using restrooms	<b>45%</b> servers, hosts, and bartenders wearing gloves
	<b>38%</b> shields between tables

In open-ended comments requested at the end of the survey, the greatest anxieties expressed were about the *behavior of others*: concerns that not all customers or employees would consistently adhere to safety measures and protocols.

**OUTDOOR DINING OPTIONS ESSENTIAL:** The survey suggests that outdoor dining options will be essential to the recovery of Center City restaurants. More than **92% of respondents** report that they will feel more comfortable dining outside at a sidewalk or street table than inside at a table or bar. Similarly, 84% indicated they would be more likely to dine out if bars and restaurants provide more outdoor seating.

## FINDINGS ON RETAIL

The survey captures clearly how the stay-at-home order prompted more people to rely on online shopping: 83% reported purchasing items online for delivery; 32% made online purchases, which they picked up at curbside. After stores reopen, 26% expect to make more online purchases than they did before the shutdown.

Similar to responses regarding restaurants, customers expect to come back slowly to in-store shopping: 20% expect to return to in-store shopping immediately after stores reopen; 23% expect to return within the first two weeks. Another 19% expect to return to shopping in the first three to four weeks after reopening; 21% expect to wait a month; 16% expect to wait at least two months. Older respondents expect a longer delay in their return to in-store shopping, with 42% of those age 65 or older expecting to wait one month or more, compared to 35% of those under age 35.

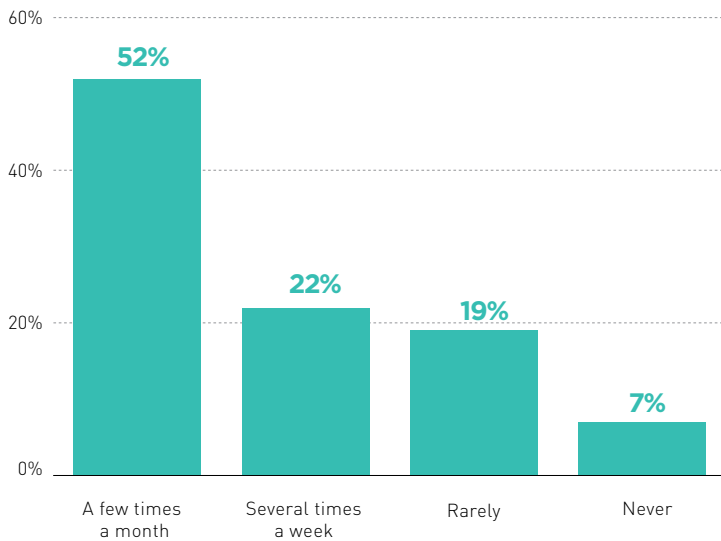
The survey asked what factors would help potential customers feel more comfortable shopping in stores. Ranked in descending order of importance:

<b>89%</b> staff wearing masks	<b>67%</b> signs about social distancing
<b>86%</b> shoppers wearing masks	<b>58%</b> contactless payment
<b>84%</b> limits on the number of shoppers inside	<b>57%</b> floor signs designating proper social distance
<b>78%</b> safety training for personnel	<b>49%</b> floor signs regulating customer flow
<b>70%</b> signs requiring masks	

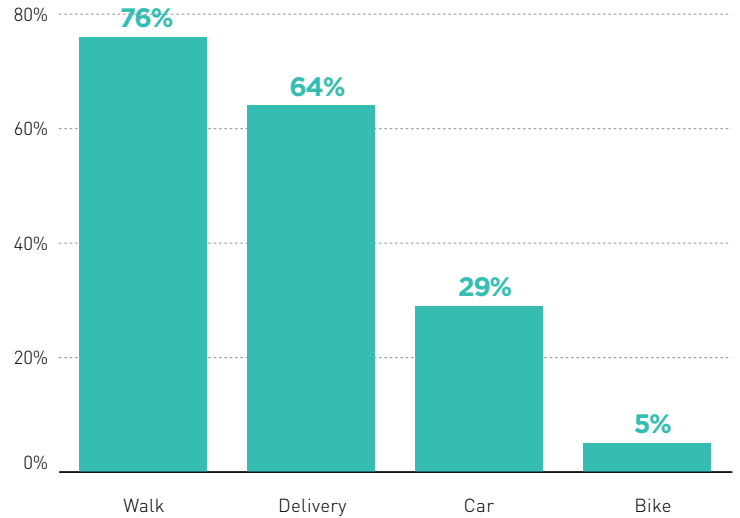
Overall, the survey findings suggest that those businesses that clearly post and adhere to safety protocols will be the most successful in restoring customer confidence. Still, it is important to acknowledge that an overall decline in cases and the development of a successful vaccine are the most important variables in determining the speed of full economic recovery.



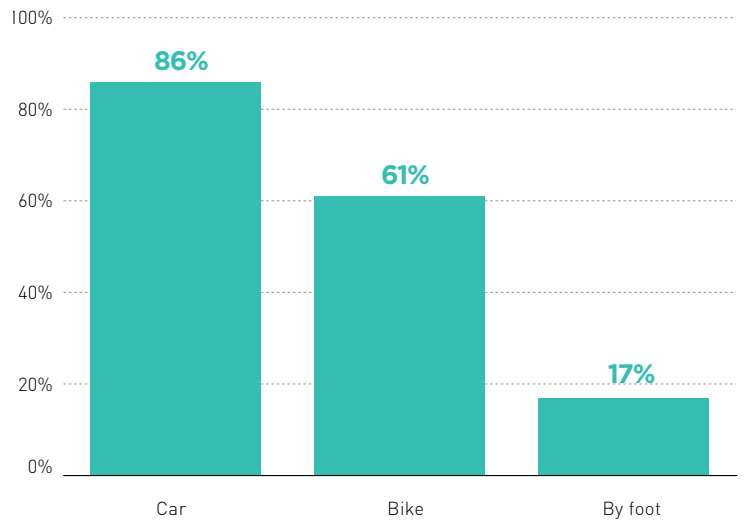
**Q1. Since mid-March, how frequently have you purchased take-out meals from local restaurants?**



**Q2. If you have patronized local restaurants, how have you picked up your purchase? (Please check all that apply.)**

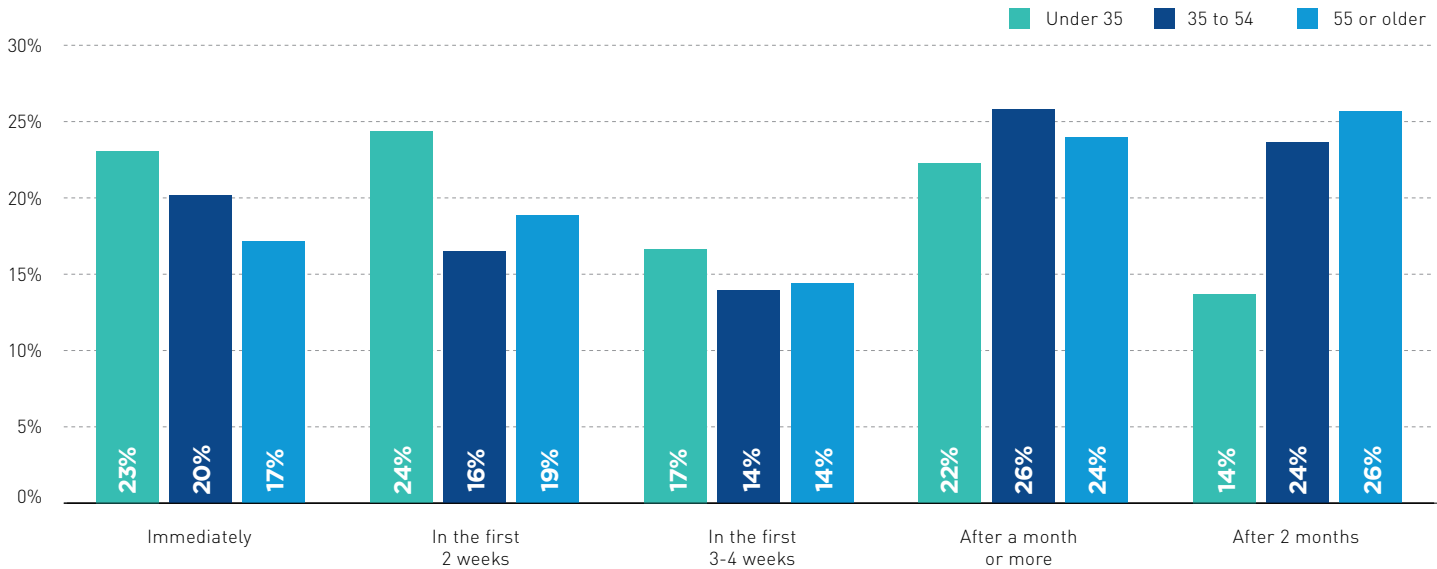


**Q3. If you've had your meal(s) delivered, how were they delivered? (Please check all that apply.)**

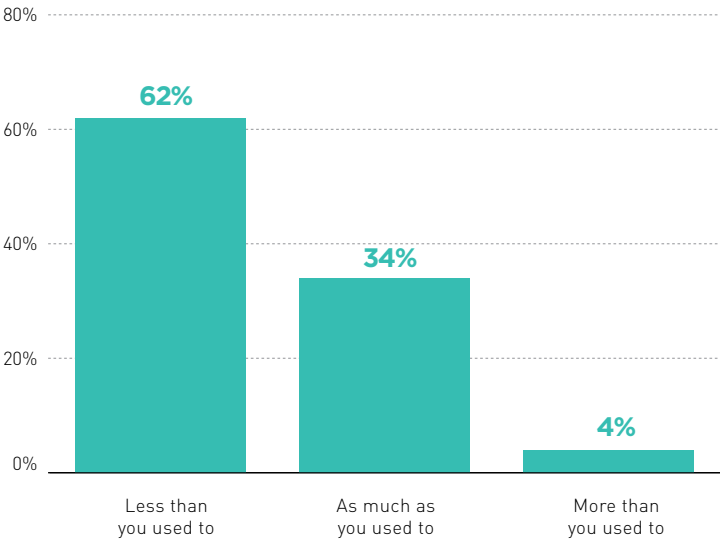


**During the stay-at-home period, 76% of take-out purchases were made by those who walked to a local restaurant**

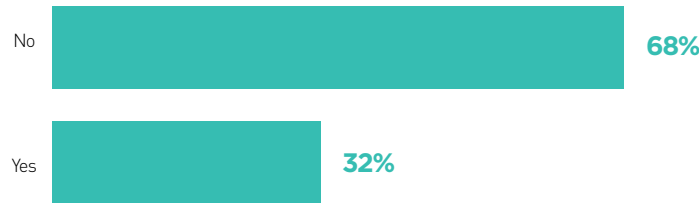
Q4. Once restaurants reopen for onsite dining, how soon do you expect to dine out?



Q5. Once restaurants reopen for onsite dining, do you plan to dine out...



Q6. Before the stay-at-home order, did you frequently rely on take-out for dinner purchases?



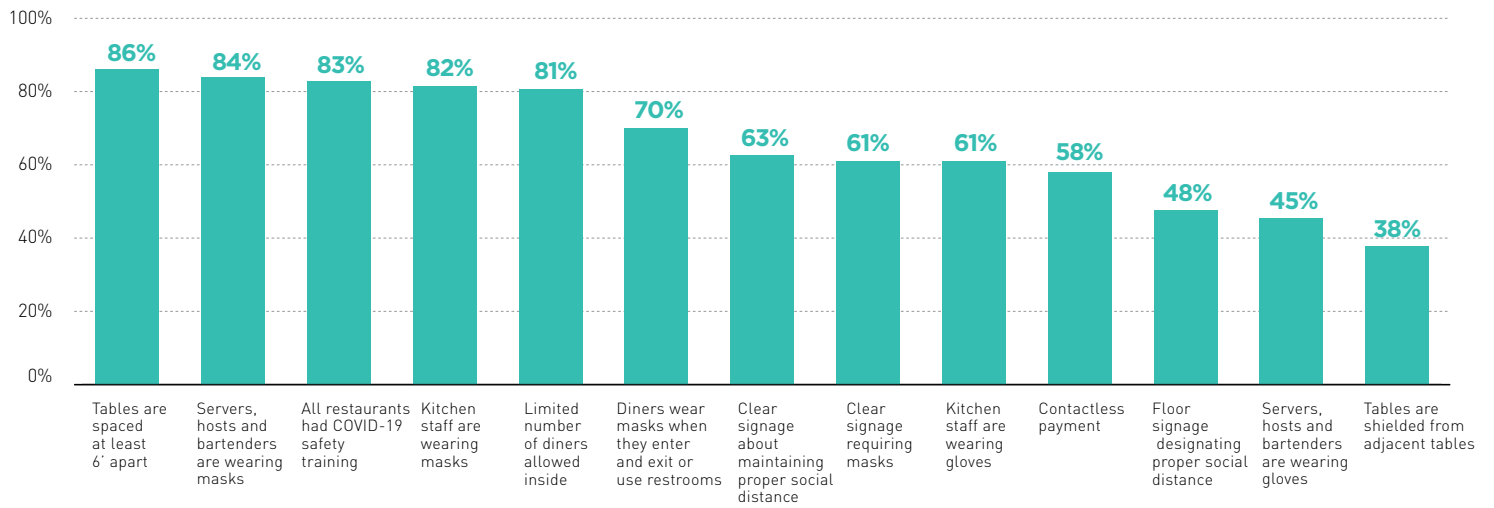
Q7. Once restaurants reopen for onsite dining, do you think you will continue to rely on take out?

50% As much as I used to  
33% I never relied on take out  
17% More frequently than I used to

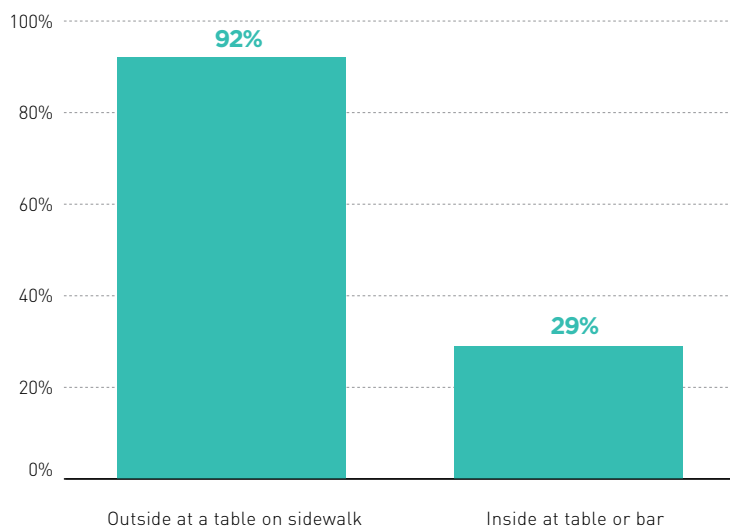


67% of respondents plan to continue to rely on take out once restaurants reopen.

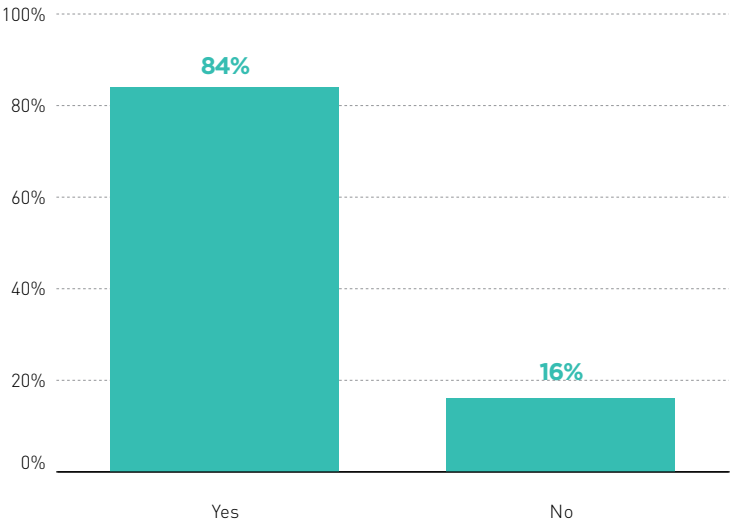
**Q8. Which factors noted below would make you feel more comfortable dining out?**  
(Please check all that apply.)



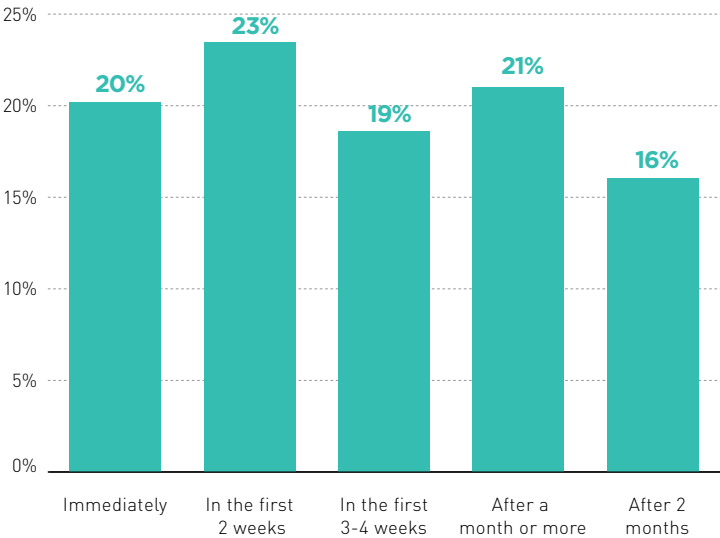
**Q9. When dining out, where would you feel most comfortable dining? (Please check all that apply.)**



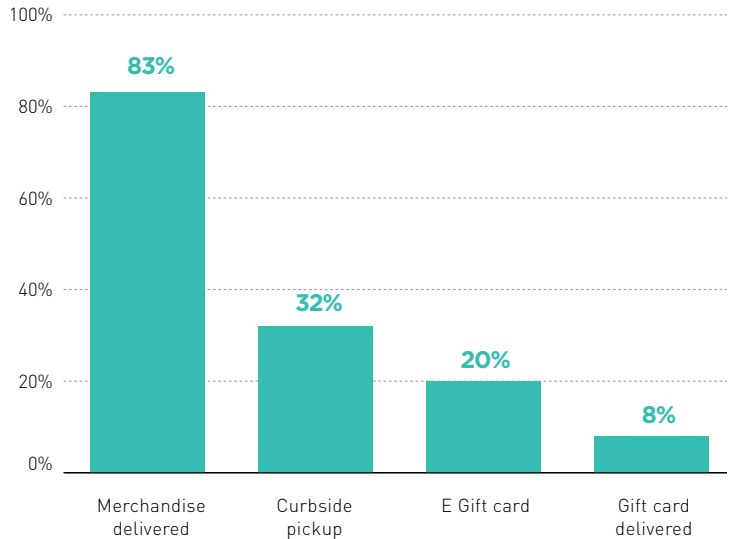
**Q10. If bars and restaurants provide more outdoor seating (sidewalk, parking lane, street), would you be more likely to dine out?**



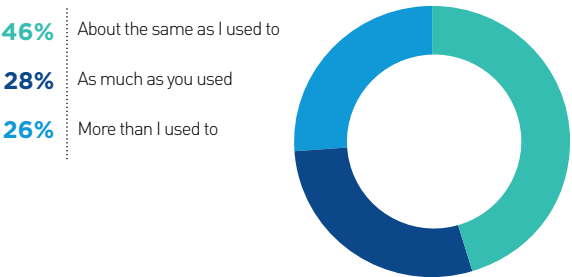
**Q11. Once retailers reopen for business, how soon do you expect to enter retail stores to shop?**



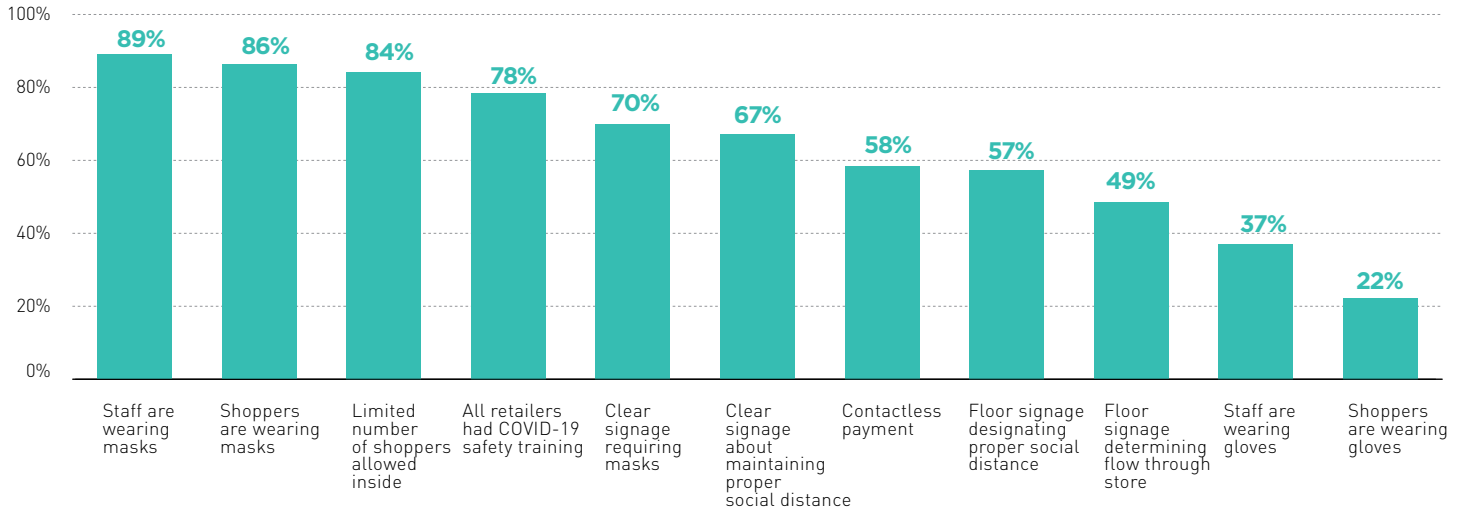
**Q12. Have you made a purchase from a local retailer during the stay-at-home order whose indoor premises were not open to the public? (Please check all that apply.)**



**Q13. Once retail stores reopen for in-store shopping, do think you will continue to make purchases online...**

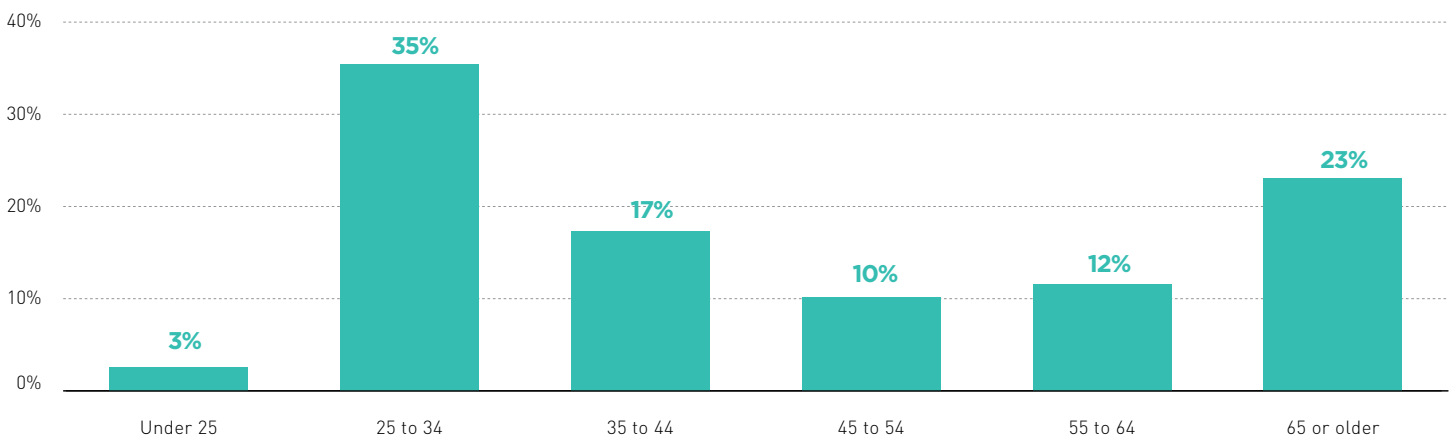


# Q14. Which factors would make you feel more comfortable shopping at a store? (Please check all that apply.)



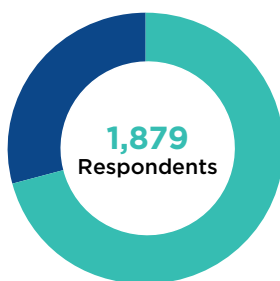
## DEMOGRAPHICS

### Age

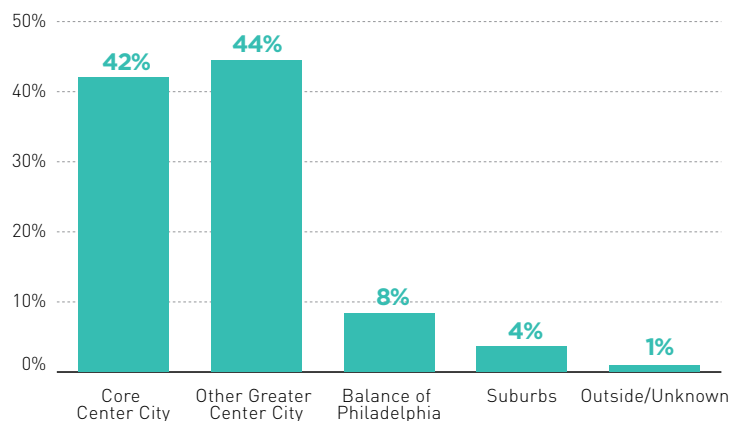


### Gender

71% Female  
29% Male



### Home Zip code



While the survey was distributed to Center City residents, a small number of the surveys were apparently forwarded to those who live elsewhere.

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