



CENTER CITY REPORTS

Restaurant and Retail Recovery: Expanded Survey Results for All Center City

OCTOBER 2020

CENTER CITY DISTRICT,
CENTRAL PHILADELPHIA DEVELOPMENT CORPORATION

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As a supplement to CCD/CPDC's October 5, 2020 report on the recovery of the restaurant and retail sectors within the Center City District, this report provides data for the entire area from Vine Street to Pine Street between the Delaware and Schuylkill rivers.¹

The survey, which was conducted on foot by Center City District staff in the last two weeks of September, assessed both the type of business and whether it was fully or partially open. For restaurants, the survey also identified whether indoor or outdoor dining was available and the number of outdoor seats that were deployed.

OVERALL FINDINGS

As of September, there were 3,606 storefront locations within the area of Center City shown in figure 1. Of these, 1,542 (43%) were fully open, 1,036 (29%) were partially open, 601 (17%) were closed, and 427 (12%) were vacant. This is very similar to the survey results for the 1,885 businesses located within CCD's boundary: 41% were fully open, 29% were partially open, 19% were closed, and 11% were vacant.

Among occupied properties, 34% of Center City locations were restaurants, compared to 38% within CCD; 31% of occupied spaces in both Center City and CCD were retail stores. In the broader area of Center City, 35% of occupied storefronts were service businesses, compared to 31% in CCD.

The full survey results are presented in Figure 6.

¹: See *Restaurant and Retail Recovery: Slow, Steady, but Fragile* for the results for businesses located within the Center City District.
<https://www.centercityphila.org/research-reports/restaurant-and-retail-recovery-slow-steady-but-fragile>

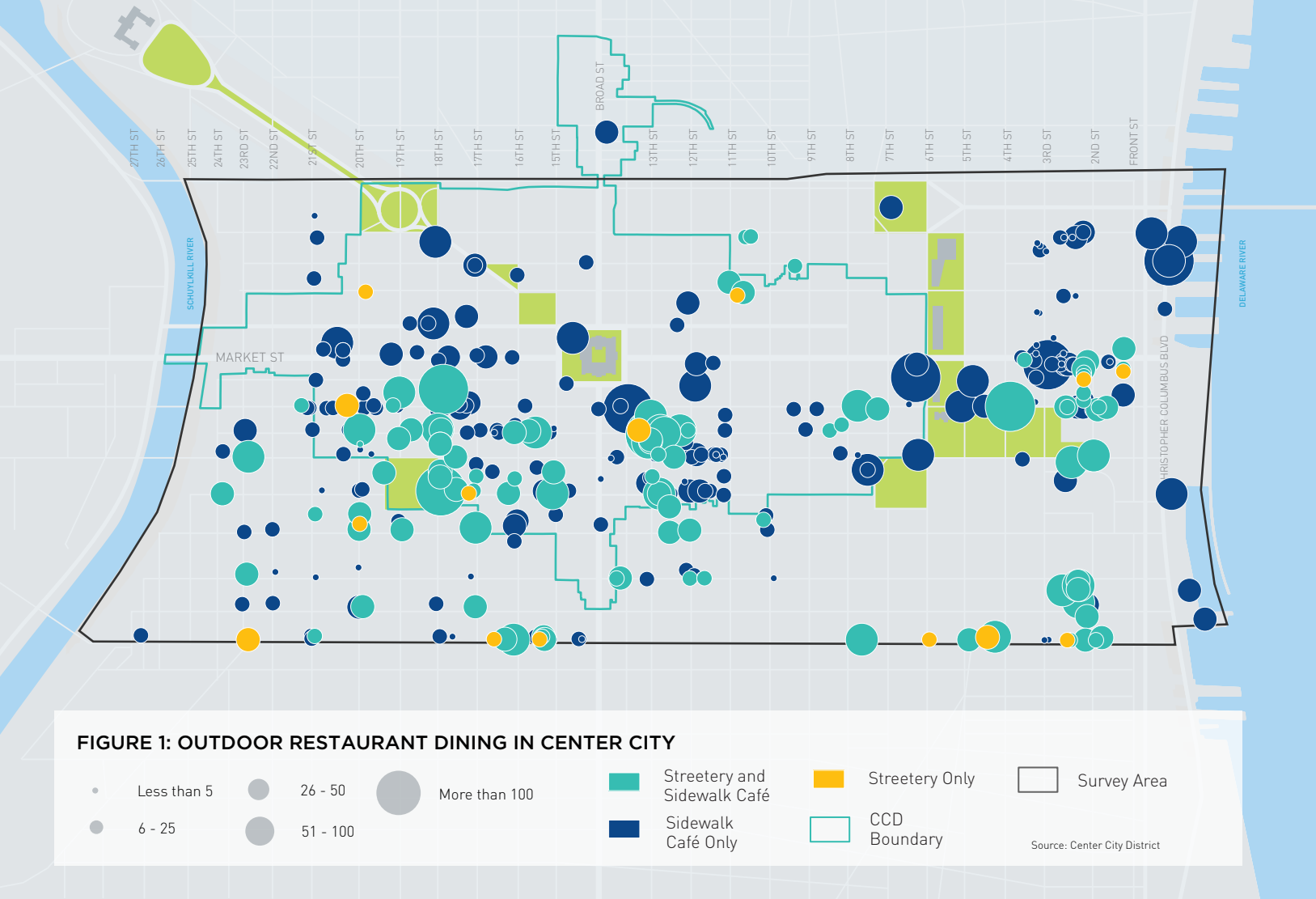


FIGURE 2: OUTDOOR SEATING BY TYPE

RESTAURANTS

The survey identified 633 restaurants within CCD and 1,078 within Center City as a whole, including those in the CCD. Among these, 209 (19%) were fully open, meaning that they offered indoor seating to the extent allowed.² In most cases, restaurants with indoor seating also offered outdoor dining, takeout, and/or delivery options. Restaurants that did not offer indoor seating but did provide outdoor seating, takeout, or delivery were defined as partially open. There were 606 partially open restaurants, representing 56% of all Center City restaurants. The remaining 263 food establishments (24% of Center City restaurants) were closed. Among the closed restaurants, 208 were considered temporarily closed with plans to reopen.

Within the broader Center City area, a slightly larger proportion of restaurants were fully open than within CCD, and fewer were partly open or closed. In broader Center City, 19% of restaurants were fully open compared to 15% in CCD's boundary, while 56% of broader Center City restaurants were partially open, compared to 58% in CCD. Of all restaurants in broader Center City, 24% were closed compared to 27% in CCD.

OUTDOOR SEATING TYPE	CENTER CITY DISTRICT	CENTER CITY (VINE TO PINE, RIVER TO RIVER)
Sidewalk Café	2,628	4,730
Sidewalk Café and Streeterly	2,414	4,528
Streeterly Only	110	257
TOTAL	5,152	9,515

² The September survey occurred prior to the decision by the City of Philadelphia to expand the limit on indoor dining from 25% to 50% of capacity effective October 2.

Expanded outdoor seating has been an important way that the City of Philadelphia has enabled restaurants to serve more customers in a socially distanced manner consistent with pandemic guidelines. Within Center City, 200 restaurants have incorporated outdoor seating in sidewalk cafes and/or streeteries, accounting for more than 9,500 seats. Many restaurants, some previously without outdoor seating, are using streeteries to add new dining options for their customers.

Outdoor dining has been facilitated by street closures authorized by the City throughout Center City. Weekend closures are occurring on 2nd Street, both in Old City and in the South Street Headhouse District area, as well as on the 400 and 700 blocks of South Street. Other closures that are occurring within the CCD are on 13th and 18th streets, Juniper Street, Drury Lane, the 1500 block of Sansom Street, and the 1100 block of Filbert Street adjacent to the Reading Terminal Market.

FIGURE 3: CENTER CITY RESTAURANTS AS OF SEPTEMBER 2020

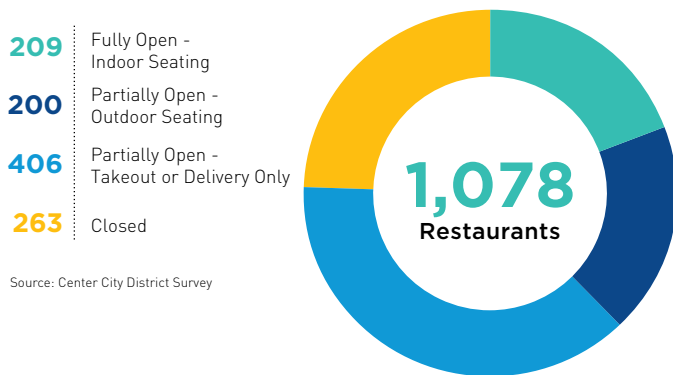
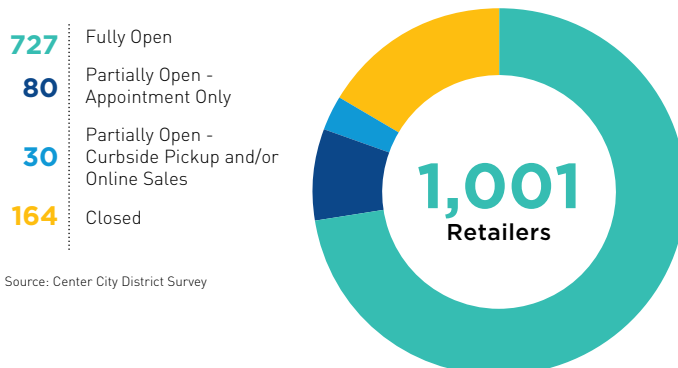


FIGURE 4: CENTER CITY RETAILERS AS OF SEPTEMBER 2020



RETAIL

The survey identified 1,001 retail locations in Center City. Of these, 727 (73%) were fully open. Retailers that only provided curbside pickup and/or services by appointment are defined as partially open. There were 110 partially open retailers in Center City, representing 11% of the total. The remaining 164 retailers (16% of the total) were closed.

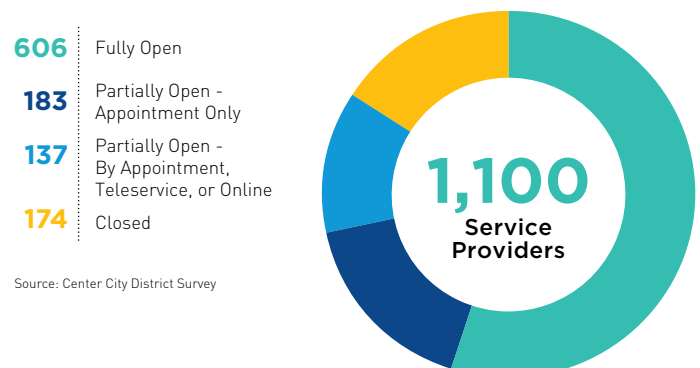
The open or closed status of retailers in Center City was comparable to that within the CCD. While 73% of retailers in all of Center City were open, 75% of CCD retailers were open; 11% of Center City retail establishments were partially open, compared to 9% of retailers within the CCD. The percentage of closed retailers (16%) was the same in Center City and CCD.

SERVICES

There were 1,100 service businesses in storefronts in Center City, including banks, gyms, salons, and laundry services, as well as first and second floor offices for lawyers and doctors. Of these, 606 (55%) were fully open, 320 (29%) were open partially, and 174 (16%) temporarily or permanently closed. Service establishments were considered partially open if they only offered services by appointment and/or online services.

Again, the extent to which service establishments were open for business in the broader area of Center City was similar to that in the CCD. In Center City, 55% of service businesses were fully open, compared to 58% in the CCD. In Center City, 29% of service businesses were partially open, while 24% of service establishments were partially open in CCD. Within Center City, 16% of service storefronts were closed, compared to 18% in the CCD.

FIGURE 5: CENTER CITY SERVICE PROVIDERS AS OF SEPTEMBER 2020



CONCLUSION

Restaurants and retailers have been successfully improvising with support from the City and local business improvement districts to serve the maximum number of customers consistent with public health safety guidelines. However, until the pandemic abates — most likely when a vaccine is widely available — and office workers, higher education employees, administrative workers within the

health care sector, hotel guests, and college students return in large numbers, economic activity within Center City will be constrained. Nonetheless, as the CCD/CPDC early October report documented, ground floor retail, restaurant and service establishments have rebounded substantially since late spring and sidewalk vitality has been significantly restored.

FIGURE 6: FULL SURVEY RESULTS

OPERATING STATUS	CENTER CITY DISTRICT	CENTER CITY (VINE TO PINE, RIVER TO RIVER)
RESTAURANT		
Restaurant - Fully Open - Indoor Seating, Outdoor Seating and Takeout	45	133
Restaurant - Fully Open - Indoor Seating and Takeout	42	64
Restaurant - Fully Open - Indoor and Outdoor Seating	4	8
Restaurant - Fully Open - Indoor Seating Only	2	4
Restaurant - Partially Open - Takeout, Pickup or Delivery	262	406
Restaurant - Partially Open - Outdoor Seating and Takeout	96	184
Restaurant - Partially Open - Outdoor Seating Only	9	16
Restaurant - Temporarily Closed	144	208
Restaurant - Permanently Closed	29	55
RESTAURANT TOTAL	633	1,078
RETAIL		
Retail - Fully Open	394	727
Retail - Partially Open - Appointment Only	29	80
Retail - Partially Open - Online Sales & Curbside Pickup Only	14	21
Retail - Partially Open - Online Sales Only	3	9
Retail - Temporarily Closed	63	122
Retail - Permanently Closed	22	42
RETAIL TOTAL	525	1,001
SERVICE		
Service - Fully Open	294	606
Service - Partially Open - Customer Request and Appointment Only	82	183
Service - Partially Open - By Appointment and Teleservice	23	89
Service - Partially Open - Teleservice or Online Only	20	48
Service - Temporarily Closed	81	143
Service - Permanently Closed	11	31
SERVICE TOTAL	511	1,100
VACANT		
Vacant	216	427
GRAND TOTAL	1,885	3,606