

Attachment 3 CaféTO Public Survey Result Summary

General

The online survey about the CaféTO program was open from September 11 to October 31, 2020. The total number of CaféTO survey responses was 2,800 and consisted of two streams, one for restaurant and bar owner/operators and one for the general public.

- 10% of total respondents were restaurant and bar owner/operators
- 90% of total respondents were members of the general public

Age

- 18% were between the ages of 21-30;
- 35% were between the ages of 31-40;
- 22% were between the ages of 41-50;
- 17% were between the ages of 51-60;
- 5% were between the ages of 61-70;
- 2% were 71+; and
- 1% were other.

Location

- 97% of respondents indicated living in Toronto.
- Of respondents who are restaurant operators, 87% reported being located in Business Improvement Area (BIA); 8% identified not being located in a BIA, and 5% did not know if they were located in a BIA.

Owner/Operator Experience

Overall satisfaction

84% of respondents indicated that they were supportive of the CaféTO program and its goals:

Overall program satisfaction	Very satisfied: 53% Satisfied: 31% Neutral: 8% Somewhat dissatisfied: 4% Dissatisfied: 4%
Speed of response to COVID-19	Very satisfied: 30% Satisfied: 30% Neutral: 12% Somewhat dissatisfied: 17% Dissatisfied: 11%
Ease of understanding the City guidelines	Very satisfied: 36% Satisfied: 35% Neutral: 14% Somewhat dissatisfied: 10% Dissatisfied: 5%

Ease of registering for a permit	Very satisfied: 46% Satisfied: 36% Neutral: 10% Somewhat dissatisfied: 6% Dissatisfied: 2%
On-going support for City staff	Very satisfied: 32% Satisfied: 26% Neutral: 23% Somewhat dissatisfied: 10% Dissatisfied: 5% Other: 4%
Execution of curb lane closures	Very satisfied: 23% Satisfied: 28% Neutral: 18% Somewhat dissatisfied: 15% Dissatisfied: 8% Other: 8%
Promotional support	Very satisfied: 19 % Satisfied: 29% Neutral: 29% Somewhat dissatisfied: 13% Dissatisfied: 5% Other: 5%

Permitting

- 94% reported applying and receiving a CaféTO permit from the City of Toronto for a new café installation; 3% did not and 3% didn't know.
- Of those who did not apply for a permit, 50% cited the reason as being "permit not required"; 12% cited the reason as being "don't know"; 38% selected "other".
- 48% of respondents reported having a patio prior to the pandemic; and 52% reported not having a patio prior to the pandemic.

Modification to structure permissions

- 89% of respondents did not require a contractor or architect/designer to help apply for the CaféTO Program; 9% did and 2% reported "don't know".
- 90% of operator respondents indicated that they would be interested in installing a "built structure" in their CaféTO area.
- Of those interested in building structures, 49% would like "a deck over the pavement"; 56% would like "a covered roof"; 26% would like "larger signage"; 54% would like "improved lighting"; 53% would like "wind barriers"; 60% would like "a fence"; and 13% selected "other".

Financial Information

Respondents were asked how much they spent on their café extension/installation and answered as follows:

Nothing	6%
\$1-\$500	18%
\$501-\$1000	19%
\$1001-\$1500	18%
\$1500+	36%
Don't know	2%

Respondents were asked how much of their overall revenue came from customers using their expanded CaféTO area and answered as follows:

0%-20%	24%
21%-40%	23%
41%-60%	14%
61%-80%	18%
81%-100%	18%
Don't know	3%

- When asked if their restaurant would have been financially viable without the additional outdoor space, 66% of operators said no, 16% said yes and 18% said they don't know
- Operators reported using the following government programs for their bar/restaurant: 72% used the Temporary Wage Subsidy; 70% used Rent Assistance for small businesses (CERCA); 7% used the City of Toronto's SHOPhere initiative; 14% reported using "other", including the Canada Emergency Business Account (CEBA), and Digital Main Street.
- Of respondents who did not extend their existing patio, 9% cited "my restaurant did not qualify for the CaféTO program"; 18% identified that the "application process was challenging"; 9% indicated they were "unable to obtain insurance"; 32% cited "it didn't make sense for my business plan"; 32% cited "no space"; 5% indicated "didn't want to hire staff"; and 41% selected "other".

Likelihood of participation in future program

- 95% of respondents indicated that they would be interested in participating in the CaféTO program next year if it is offered, 1% indicated they would not and 4% said they didn't know

Patrons' Experience

Overall support

88% of survey respondents were in support of expanded sidewalk and curb lane cafés being allowed in the City even after the pandemic has passed, and 12% were felt they should not be permitted.

Of respondents who support the continued extension of cafés, rationale includes:

- Benefits local businesses (95%)
- Adds to vibrancy of the City of Toronto (93%)
- Enhances ability to enjoy the City (88%)
- Prioritizes people over cars (77%)

Of respondents who indicated they felt cafés should not be permitted following the pandemic, reasons include:

- Worsens traffic (80%)
- Makes sidewalks less accessible (71%)
- Reduces ability to get around the city on car/foot (65%)
- Inhibits ability to shop (less parking) (47%)
- Increases noise (39%)
- Encourages drinking (12%)

Outdoor Dining

83% of respondents indicated having visited a restaurant/bar patio over the summer. The following table indicates the number of visits reported:

1-2 visits	21%
3-5 visits	36%
6-10 visits	26%
10+ visits	16%

Overall Satisfaction with Patio Experience

Of respondents, 60% indicated being "very satisfied" with their experience at a patio; 30% indicated being "satisfied"; 6% indicated being "neutral"; 2% indicated "somewhat satisfied"; and 2% were "dissatisfied".

Motivating factors

When asked what main factors motivated patrons to visit a patio, 90% wanted to support local businesses, 67% felt it was safe way to get together, 66% wanted to enjoy quality food/drink, 63% wanted to socialize, 62% wanted a reason to get out of the house, 26% said for entertainment.

Satisfaction with safety measures

Of respondents, 93% indicated feeling safe with the available measures being used to prevent the spread of COVID-19. Of these responses, 73% had used a curb lane café; and 76%

indicated using a sidewalk café. Of the respondents who visited a curb lane café, 72% indicated feeling protected from street traffic. 8% of total respondents indicated they had experienced barriers related to accessibility.

Factors that respondents felt could have enhanced their experience

- 58% said enhanced décor
- 54% wanted more safety barriers
- 40% said a deck
- 17% said nothing
- 15% said an accessibility ramp

Traveling to cafés

- 63% of respondents indicated they had walked to the café/restaurant they visited;
- 12% indicated they had cycled;
- 7% indicated using public transit;
- 16% chose a car;
- 1% indicated "other", including ride share, mobility devices, or a mix of mode shares

Public Parklets

- Of respondents, 28% had visited a public parklet in a CaféTO area and 72% had not.
- Of those that had visited a public parklet, 94% indicated having a favourable experience.
- Of respondents who indicated a positive experience in public parklets, reasons included: adds to vibrancy of the City of Toronto (83%); benefits local businesses (60%); prioritizes people over cars (69%); enhances ability to enjoy the City (82%); inexpensive way to enjoy street (78%); other (10%)

Communications & Outreach Feedback

Engagement

- 99% of respondents were aware of the City allowing the restaurants/bars to extend and install new cafés on sidewalks and curb lanes, with 79% of respondents being aware of the program name, "CaféTO".
- Of all respondents, 63% had seen a restaurant/bar with a sidewalk/curb lane café; 48% of respondents about the program on social media; 24% learned about it from a television news story, 35% heard about it from a City of Toronto announcement and 6% heard about it on a radio interview.