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Online Role of Restaurant Researchers

Google/OTX
U.S., January 2009

Online's Role Has Grown

90%

Of diners go online
for information
about restaurants

▲ 32% increase over last year

80%

Use search as part
of decision process

▲ Half of all searches are
made from a mobile device,
50% growth over last year

70%

Use the Internet to
choose a restaurant



Majority Of Diners Are Planning Where To Eat

70% use the Internet to decide what restaurant to visit

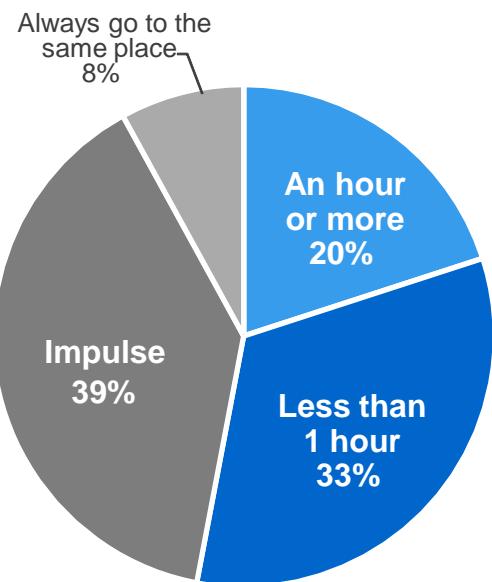


Source: Online Testing Exchange Restaurant Survey, April 2009

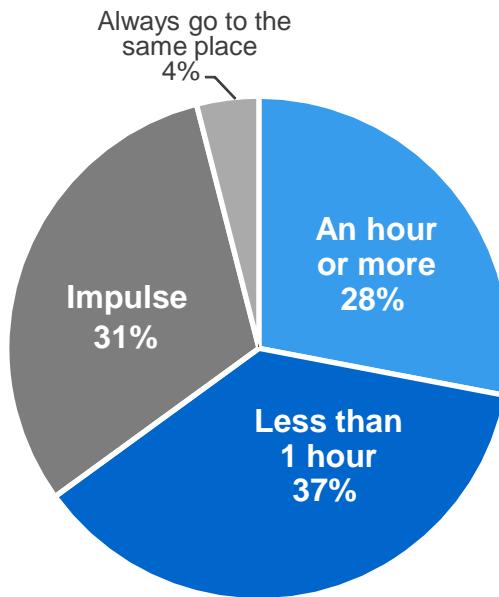
Majority Of Diners Are Planning Where To Eat

How far in advance do diners decide which restaurant to go to?

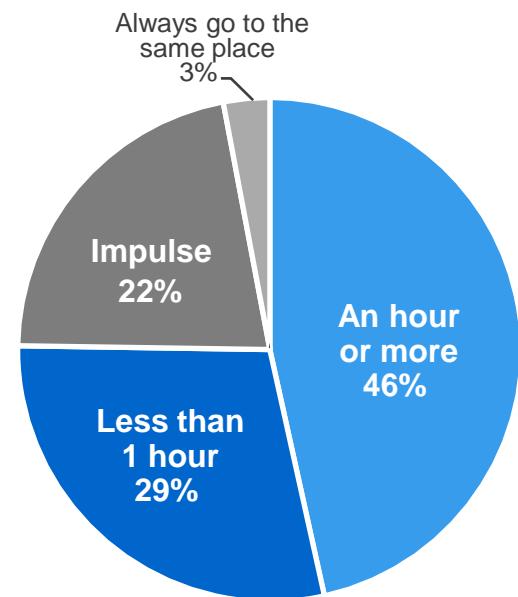
Breakfast



Lunch



Dinner



Source: Online Testing Exchange Restaurant Survey, April 2009

Online Is Part Of Diner Research

52%

Look for coupons or
special offers



A 53% increase from 2007

37%

Look for where to
eat lunch or dinner



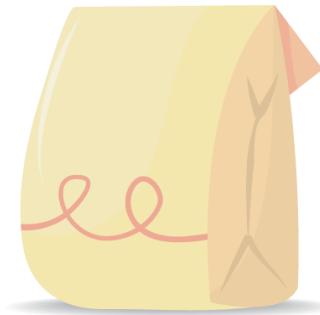
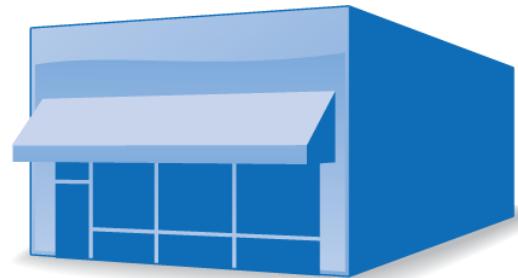
A 131% increase from 2007

35%

Look for food to
order for take-out or
delivery



A 133% increase from 2007



Source: Online Testing Exchange Restaurant Survey, April 2009

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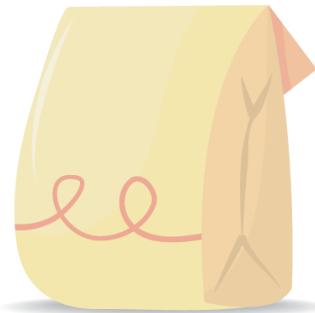
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Online Is Part Of Diner Research: Sales

35%

Order take-out
or delivery

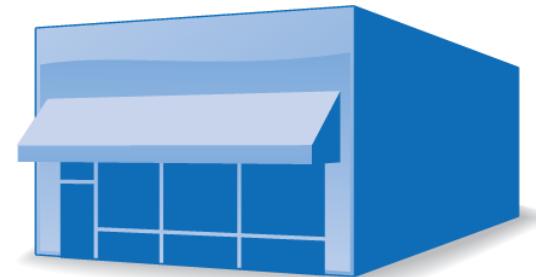
72% use the phone to order
(54% go online to research
facilities information)



19%

Order a restaurant
gift card

Of people researching, as
many people who buy online
will buy in-store



Source: Online Testing Exchange Restaurant Survey, April 2009

Online Is Part Of Diner Research: Brand Engagement

22%

Sign up for
loyalty programs

19%

Participate in
a contest



Source: Online Testing Exchange Restaurant Survey, April 2009

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Online Is Part Of Diner Research: Promotions

**Online is more powerful than outdoor and radio,
and equal to direct mail**

53%
Online coupons



53%
Direct mail offers



44%
Email offers



26%
Outdoor ads



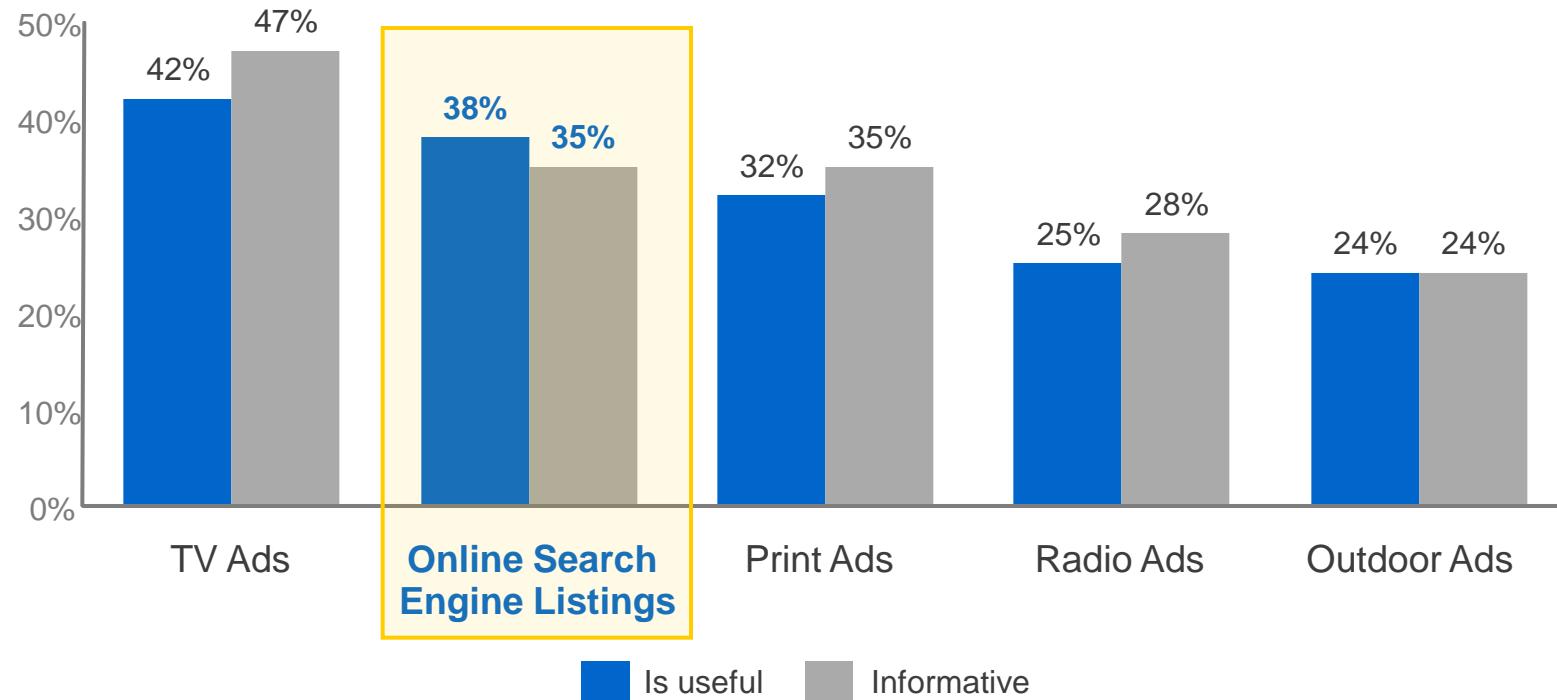
26%
Radio ads



Source: Online Testing Exchange Restaurant Survey, April 2009

Search Is A Developing Part Of Diner Research

Usefulness Of Restaurant Advertising



Source: Online Testing Exchange Restaurant Survey, April 2009

83% Of People Use Search (For Restaurant Related Activities)



Web [Show options...](#)

Restaurant Locations

68% of searches are for location,



58% increase from 2007

Restaurant Menus

57% of searches are for food/menu,



90% increase from 2007

Restaurant Coupons

45% of searches are for coupons and special offers

Restaurant Decisions

41% of searches are for decision making related to food/menu

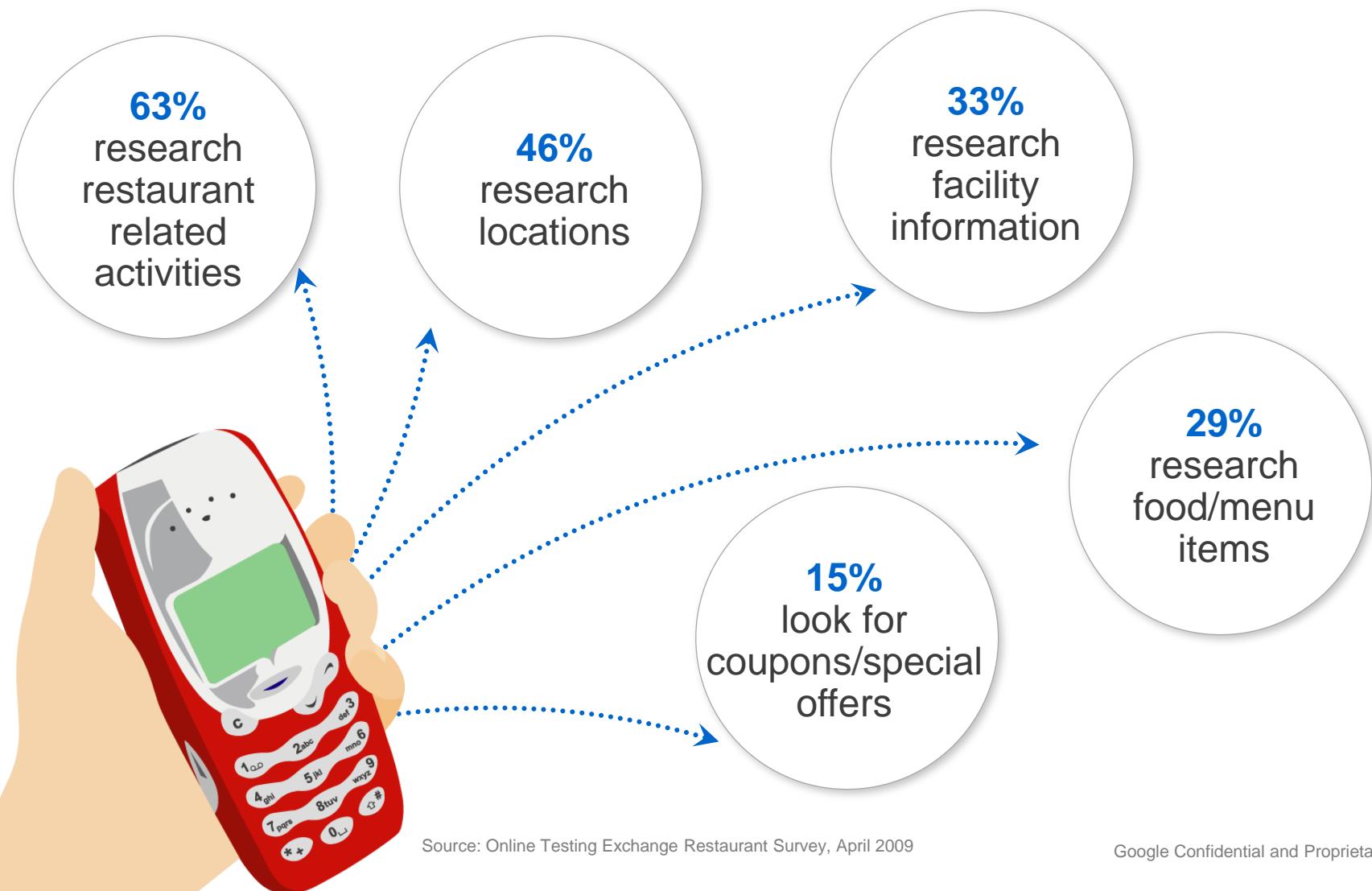
Restaurant Take-out or Delivery

19% of searches are for ordering online take-out or delivery

Source: Online Testing Exchange Restaurant Survey, April 2009

Mobile Is A Developing Part Of Diner Research

Of People Who Go Online Via Their Mobile Device (37%):



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