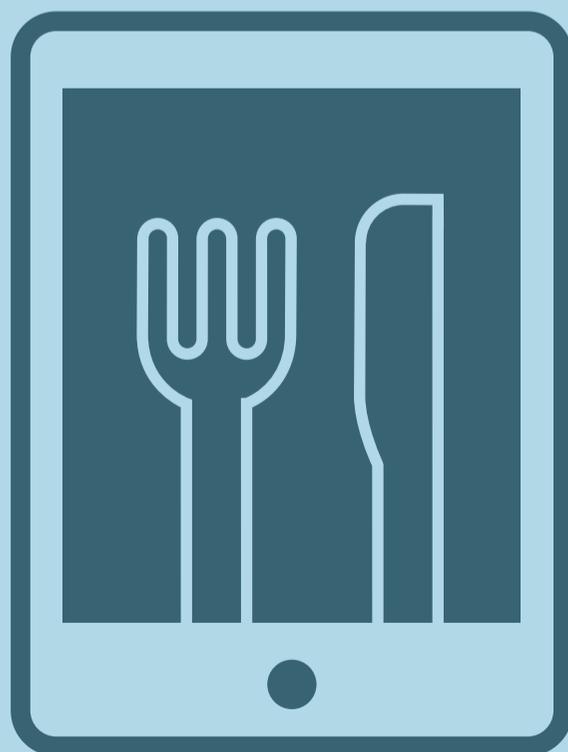




# Technology and Dining Out 2015

What consumers want from tech before, during and after the dining experience.



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# Introduction



Name an area of life that *hasn't* been significantly impacted by technology. Tricky, right? Almost everything we do today looks radically different than it did a few years ago thanks to the Internet, mobile and all things tech.

Eating out is no exception. Slowly but surely, many of the steps involved in the guest's end-to-end dining experience – researching and selecting, making a reservation, ordering food, capturing the occasion, even paying – can be done in a handful of clicks rather than through human interaction. But in an industry in which hospitality, the experience itself, is paramount, could we go too far?

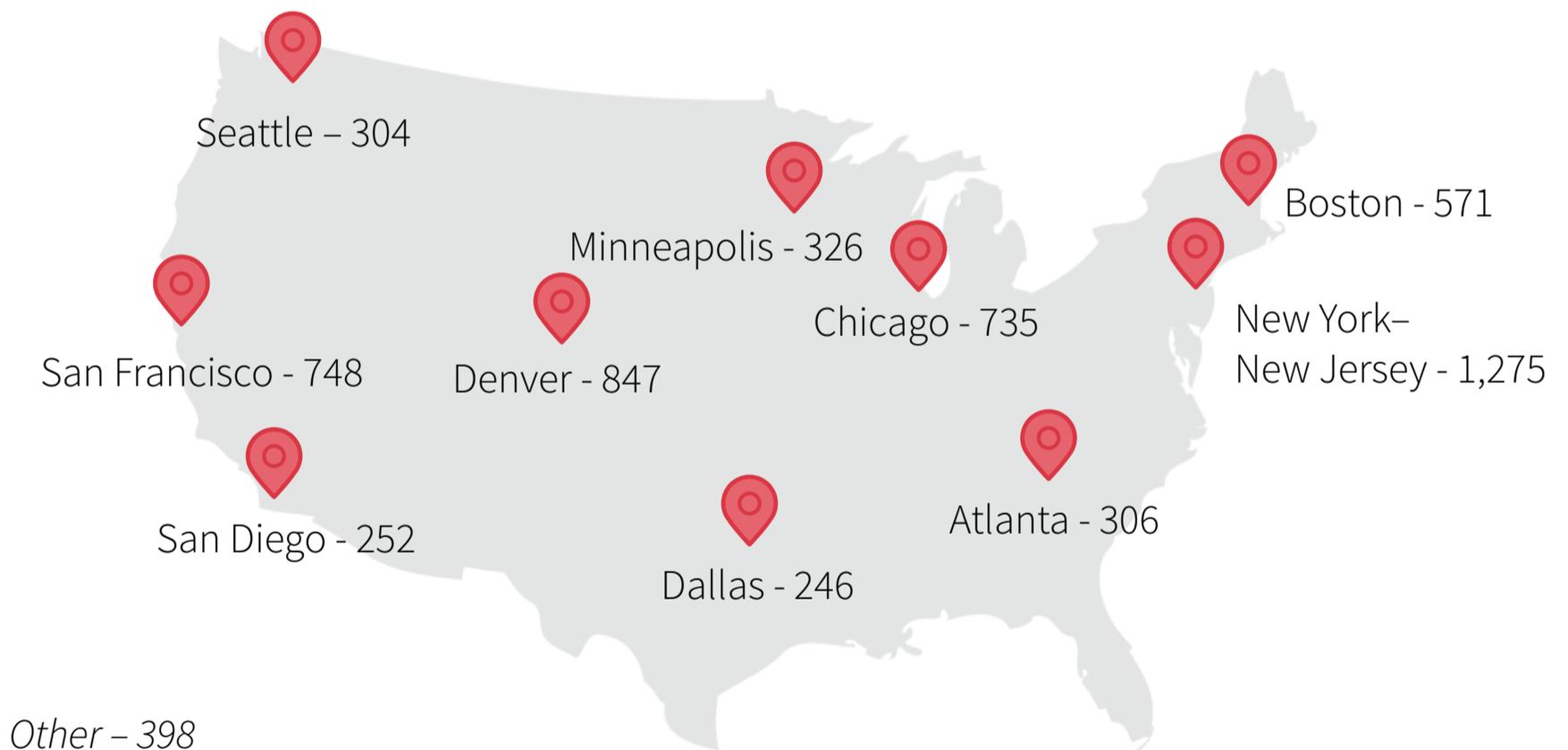
At OpenTable we sit right at the intersection of food and tech, which makes us highly curious about what people want, and don't want, from technology when they dine out. So earlier this year we conducted a survey of over 6,000 US consumers to get their honest thoughts on the topic (side note: our response rate was an almost-unheard-of eight percent. People were *really* excited to give their input).

Whether you consider the research from the perspective of restaurants or diners – and we've written this e-book with restaurateurs in mind – the results are quite fascinating.

# Demographics

We surveyed over 6,000 diners across the U.S. concentrated in ten metro areas. All were aged 18 or over and had made at least one reservation on OpenTable during the last 12 months.

## Respondents by metro area



## FIRST THINGS FIRST:

# Tech Opportunity by Concept

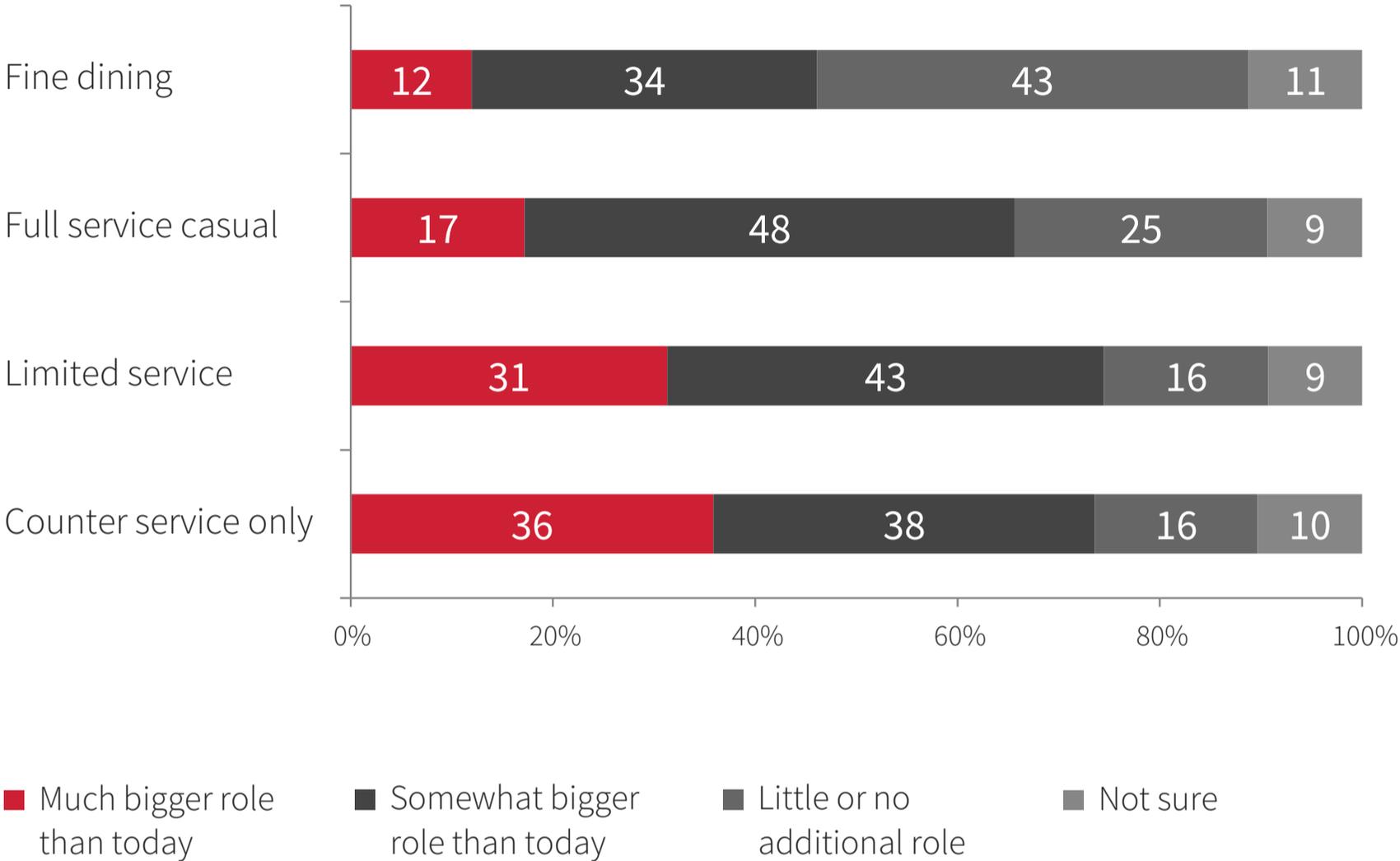
To begin, we asked our respondents to share whether they think technology might ultimately play a bigger role in restaurants than it does today. Not surprisingly, their answers varied according to the formality of restaurant setting, although all types of concept are seen to have potential for tech enhancement.

At one end of the spectrum, 74 percent of our respondents believe technology has the potential to play a ‘much bigger’ or ‘somewhat bigger’ role in casual restaurants with counter service only; 36 percent think the role could be significant.

At the other end, 46 percent perceive a ‘much bigger’ or ‘somewhat bigger’ potential role for technology in fine dining, although the proportion of those who see a ‘much bigger’ role falls to 12 percent.

The implication here: no matter how formal your setting, it’s worth keeping an eye on restaurant technology trends to make sure you incorporate the right ones for your setting.

**In the future, what role do you think technology could play in enhancing your dining experience at the following types of restaurant?**

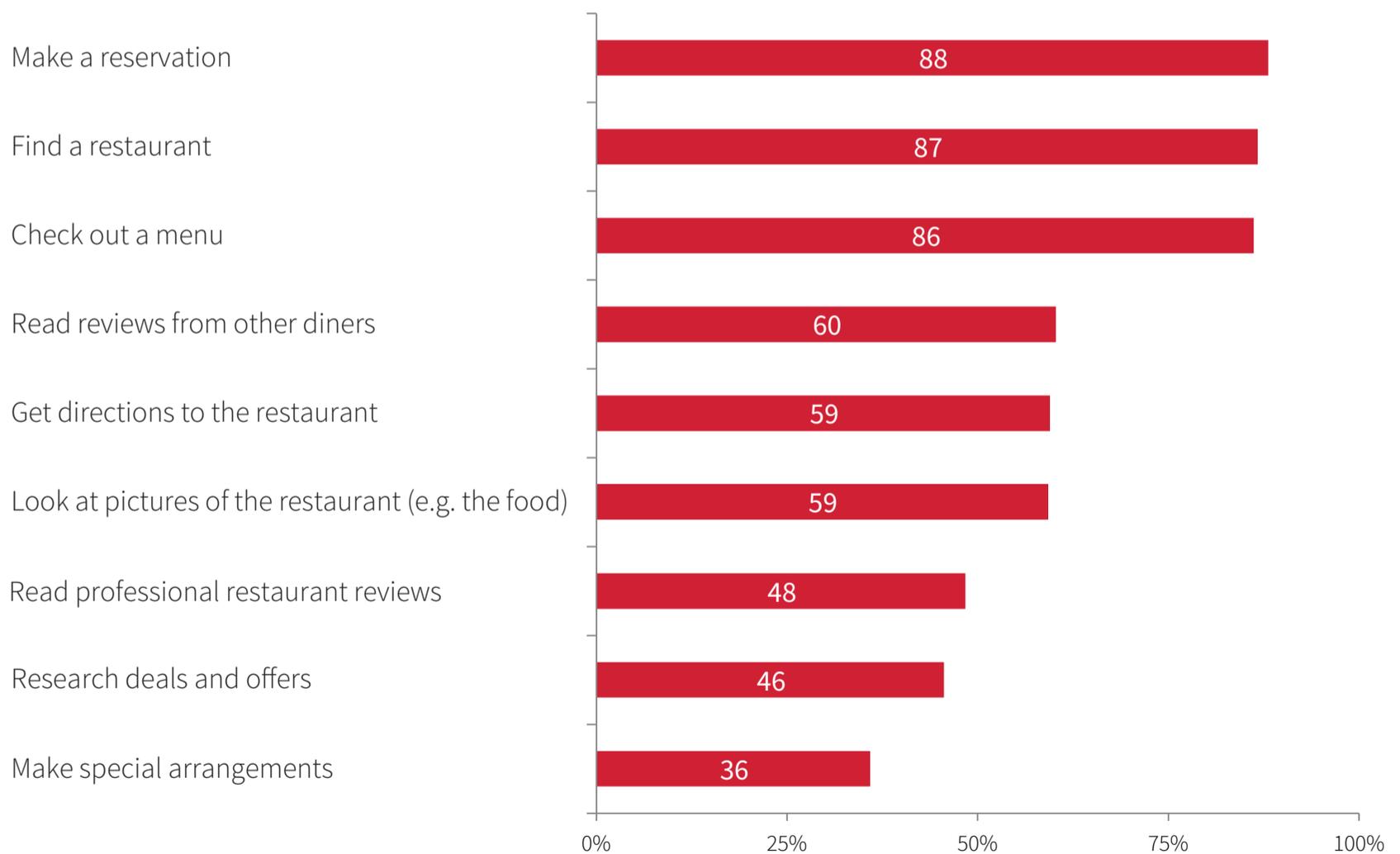


## BEFORE:

# Preparing to Dine Out

Our survey confirmed that your guests lean heavily on the Internet to make dining decisions – from finding places to eat and choosing the right restaurant for them, to figuring out how to get there.

### Percentage who “always” or “frequently”...



Since all respondents use OpenTable, it's not surprising that 'make a reservation' topped the charts, with 88 percent saying they 'always' or 'frequently' use technology to book prior to dining out. Also, seven out of eight diners routinely turn to technology to discover dining destinations.

Some more notable findings and their implications for restaurants everywhere:

### **Your menu matters**

A whopping 86 percent regularly check out menus online before they dine out. How often do you update your online menu, where do you update it, and how well does it reflect what your guests might expect when they arrive? Either commit to keeping your menu fresh, or post a sample version that's timeless.

### **Everyone's a critic**

People are 25 percent more likely to consult reviews from other diners (as 60 percent typically do) than professional critics (48 percent). While this doesn't herald the death of the restaurant critic, it does mean you should be more aware of diner reviews than ever. Listen to all of them. Respond to the good as well as the bad. Look for patterns in the feedback and adjust your operations accordingly.

### **Pictures paint a thousand words – and drive a lot of visits**

Almost 60 percent of respondents always or frequently check out images of their destination before they go. If you can, splurge on a photographer to do a quick shoot. Use natural lighting if possible. Get an assortment of shots of the food, the interior, and the exterior. And once they're ready, share your photos everywhere you can across your site, OpenTable profile, social media and more.

# The Pre-Dining Wishlist

What do diners *wish* they could do prior to their meal? It turns out they're interested in using technology to enhance their experience in three main ways:

## **Preferred access**

Waitlist access tops the wishlist, with 85 percent saying they wish they knew how long the wait for a table would be and 83 percent who would love to add their names to a waitlist before arriving. 81 percent wish technology could be used to book tables at the most coveted dining spots, and 68 percent would even like to choose their tables. (Alas, they can't all have the best seat in the house.)

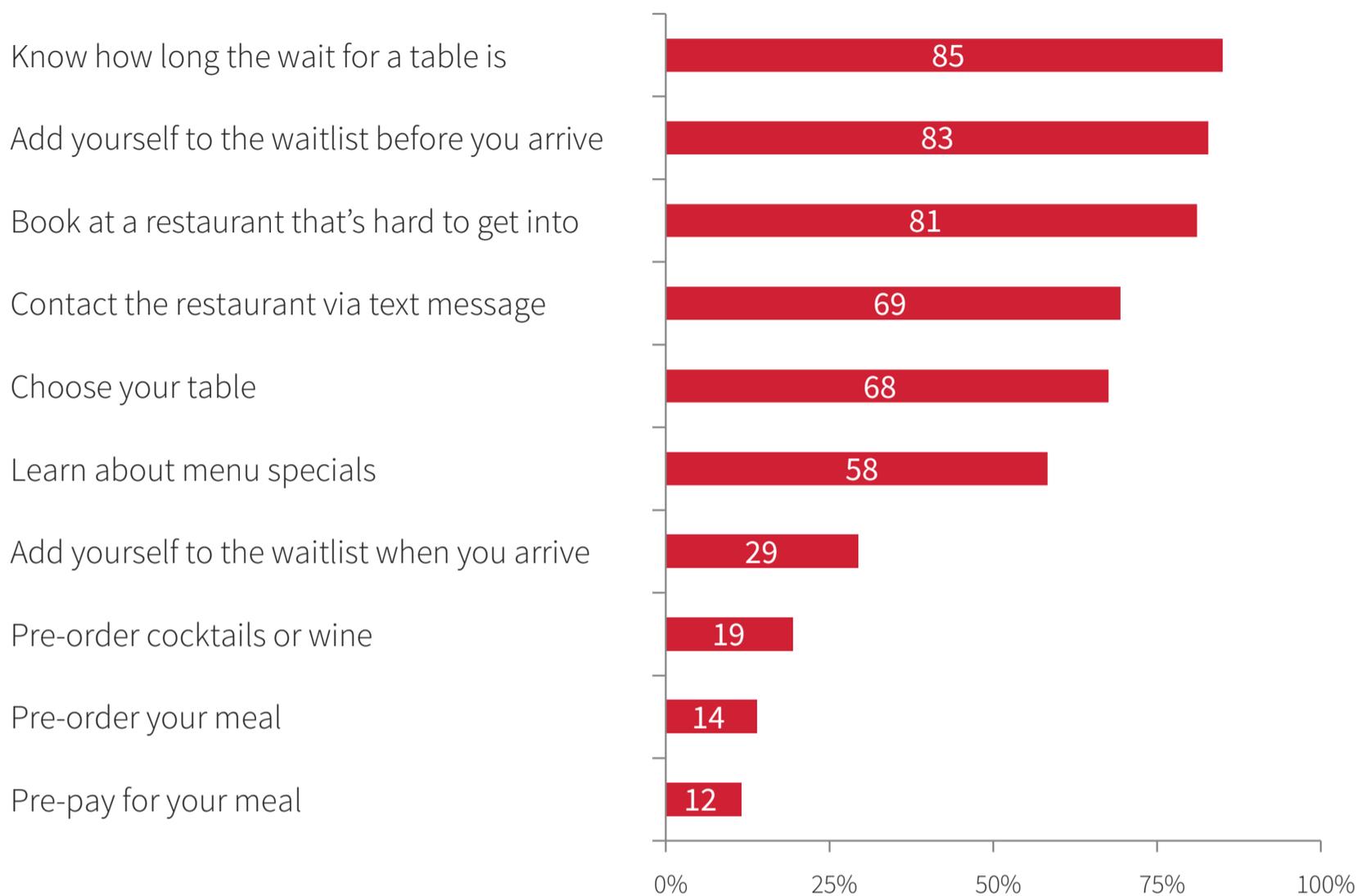
## **Better communication**

Almost 70 percent would love to be able to contact the restaurant via text message – for instance, to say they're running a few minutes late (which can cause anxiety on both sides) or to remind the restaurant about allergies or special arrangements they've made.

## **Improved discovery**

58 percent wish they could discover menu specials before dining out. Is your restaurant missing a trick in not using social to share with the world what's cooking?

## Percentage who wish they could...



### What they're not at all jazzed about: pre-ordering and pre-paying

While there may be a time and a place for ticketing, up-front transactions generally seem to be a turnoff for our respondents. Less than 20 percent think that pre-ordering cocktails using technology would be a desirable pre-dining ritual. Less than 15 percent want to pre-order food, and just 12 percent (one in eight) want to pre-pay.

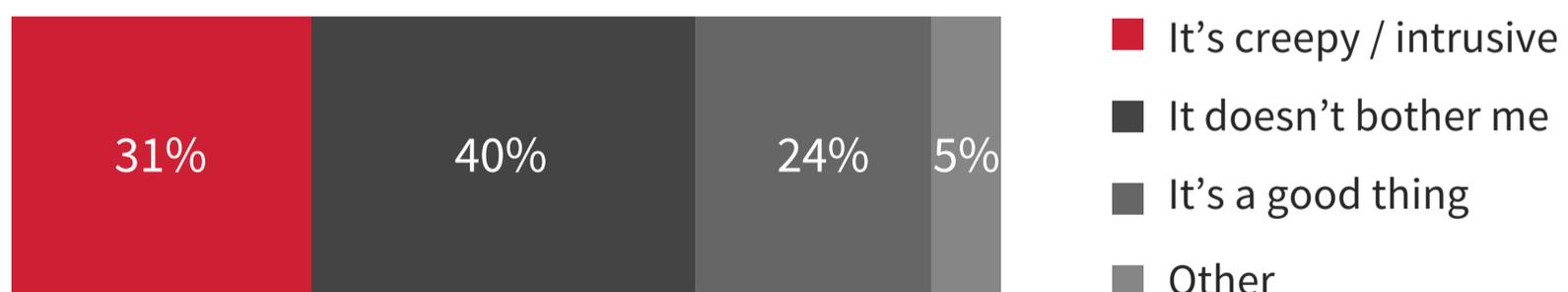
# Googling Your Guests: Creepy or Cool?

Hospitality-oriented restaurants everywhere take great pride in knowing their guests – often before they even walk in the door. But our survey suggests that not all diners are comfortable with you knowing too much.

While almost two-thirds of respondents either aren't bothered by the notion of being searched (40 percent) or perceive it as a positive (24 percent), almost one in three pronounce it 'creepy or intrusive' that a restaurant would do such a thing.

If sensitively done, restaurants still stand to provide a heightened level of hospitality by doing some pre-shift sleuthing. But be careful not to blurt out the names of your guests' kids unless you want them running for the door.

## How do you feel about restaurants googling you before you go?



Meanwhile, we also asked what people would like restaurants to know about them before they dine out. While some diners are wildly enthusiastic about sharing their profiles, others are a little more conservative.

### **Top 5 things diners wish a restaurant knew about them before they walked in**

<b>1.</b> Seating preferences	64 percent
<b>2.</b> Special dates (birthday, anniversary, etc.)	43 percent
<b>3.</b> Who to give the check to	23 percent
<b>4.</b> Allergies	19 percent
<b>5.</b> Absolutely nothing	18 percent

## DURING THE MEAL:

# Are Diners in Denial?

We then asked people to tell us how often they think they interact with their phones while at the restaurant. Not surprisingly, there's a correlation between the formality of the setting and the frequency of phone usage, with frequency appearing much higher at more casual concepts.

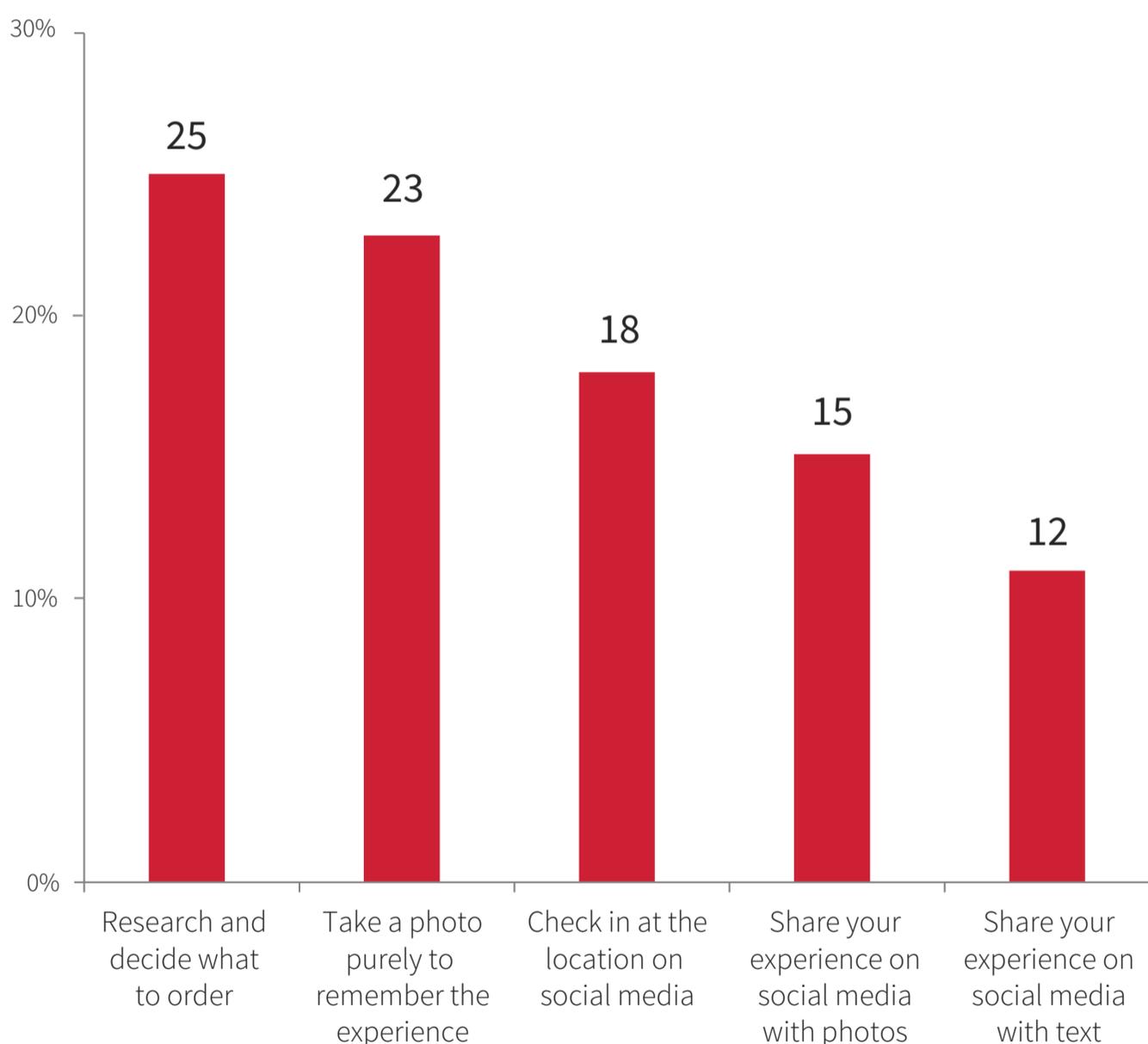
That said, stories of how phones have altered the ambience in upscale restaurants are becoming quite commonplace. With 63 percent claiming they 'rarely' or 'never' interact with their phone at a fine dining establishment, we can't help but wonder if we are a nation of diners in denial.

### How often do you typically interact with your phone during a meal at the following types of restaurant?

Restaurant type	'rarely or never'	3+ times per meal
Fine dining	63%	10%
Full-service casual	35%	22%
Limited service	23%	38%
Counter service only	22%	43%

When it comes to using phones for dining-related purposes during the meal, a surprising proportion (one in four) say they ‘always’ or ‘frequently’ use their phones to decide what to order, based on factors such as popularity of dishes in reviews and photos. Otherwise, phones are largely used for photo-taking and social media sharing.

### Percentage who “always” or “frequently” use phones during the meal to...



# Emerging In-Meal Technology

We also asked for diners' opinions on select technologies they might use during their restaurant visit. On-table touchscreens are the most commonly used by far, with mobile payments seeming to have the greatest future potential for adoption.

Over half of respondents (55 percent) have used on-table touchscreens to place an order, and four out of five who have tried such devices either like them or feel neutral.

On-table technology has been used by significantly fewer respondents to alert waitstaff during the meal (15 percent) and to re-order food and drink (12 percent).

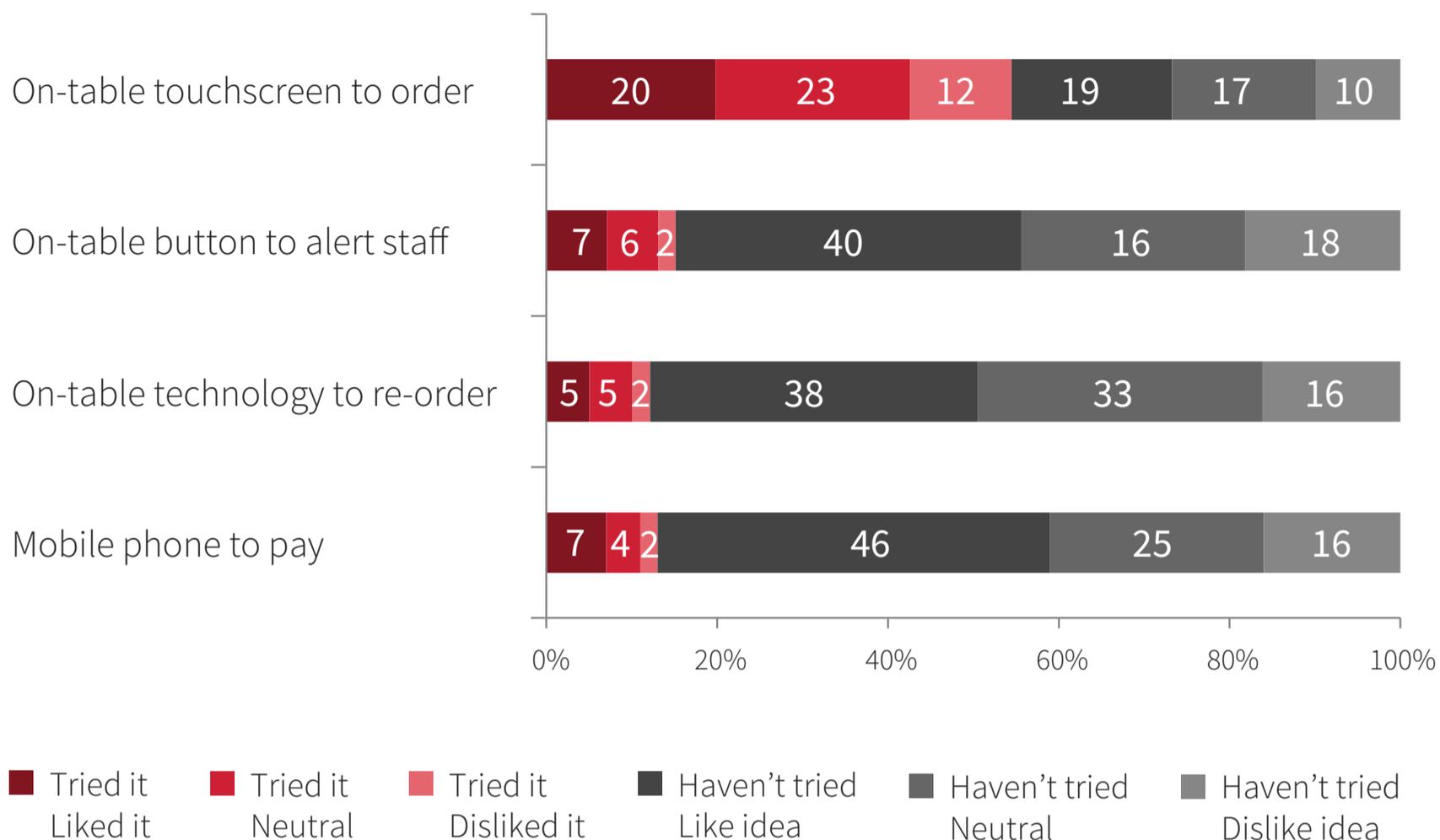
In general, these alternate uses for on-table technology seem to have strong appeal, with 40 percent saying they like the idea of using a button to alert waitstaff and 38 percent saying they like the notion of using on-table technology to re-order.

Just 13 percent have so far tried mobile payments in a restaurant, with the vast majority finding it to be a positive or neutral experience.

Consumer appetite to use mobile payments in the future is significant, with 46 percent saying they have never tried using a phone to pay at a restaurant but they like the idea.

## Have you used the following technologies used during a meal?

### What did you think?



While there's been a lot of buzz about mobile payment options, especially in the run-up to the EMV liability shift, clearly the industry is still at a very early stage of adoption. Our research suggests that the majority of consumers will ultimately be interested in paying for restaurant meals on their phone, just as they swipe to pay in other areas of their lives today.

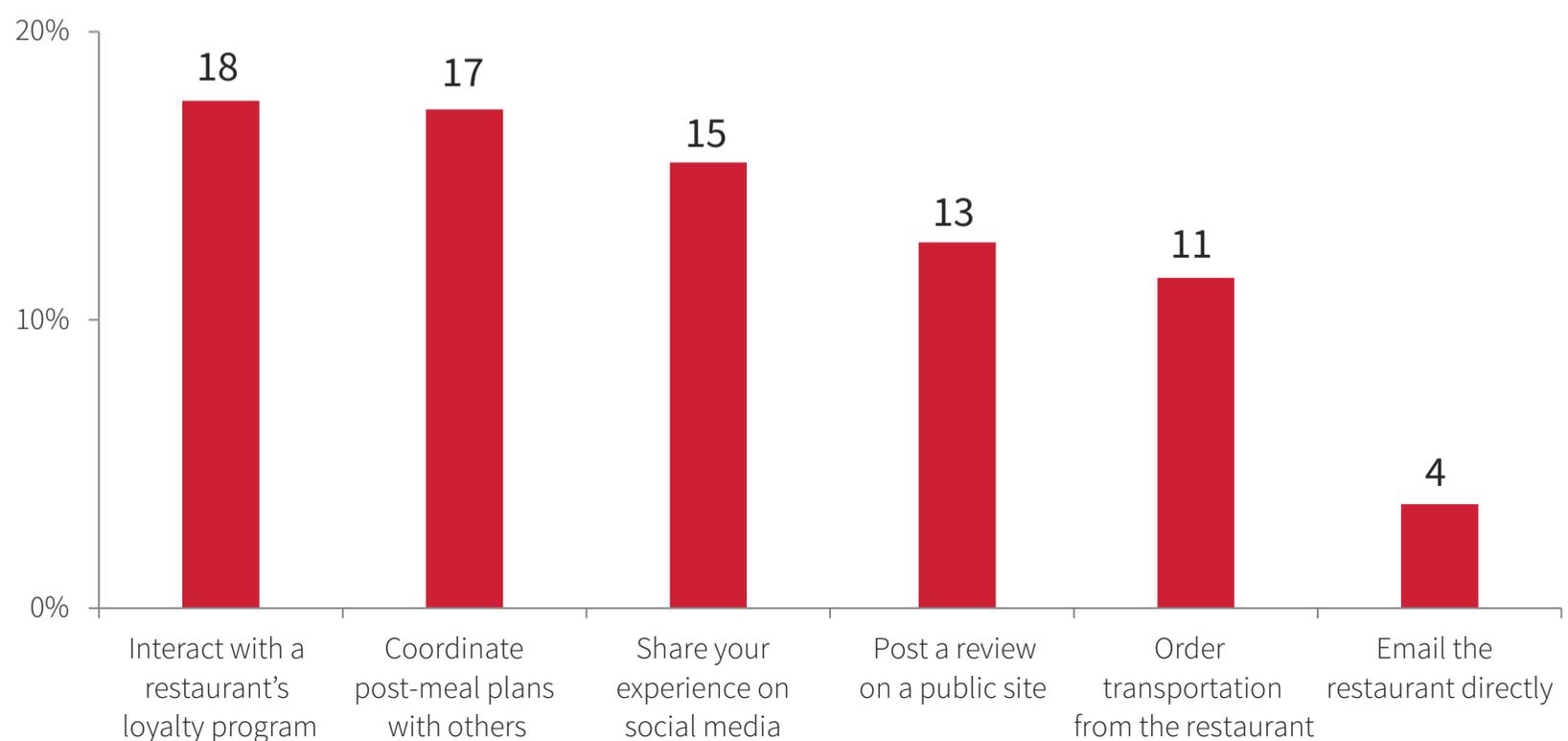
## POST-MEAL:

# Loyalty Rules, but App Builders Beware

Once the check is paid, we see a dip in technology usage for dining-related actions. Loyalty programs have the most traction, with 18 percent of respondents saying they routinely interact with a restaurant's loyalty program using technology. Planning the next move with friends (17 percent) and sharing on social media (15 percent) are just behind.

About one in eight people say they post a review – though as mentioned earlier, many more will access those same reviews prior to their next dining experience. Given the potential influence, it's worth encouraging your guests to review their good experiences and let you know directly if things can be improved.

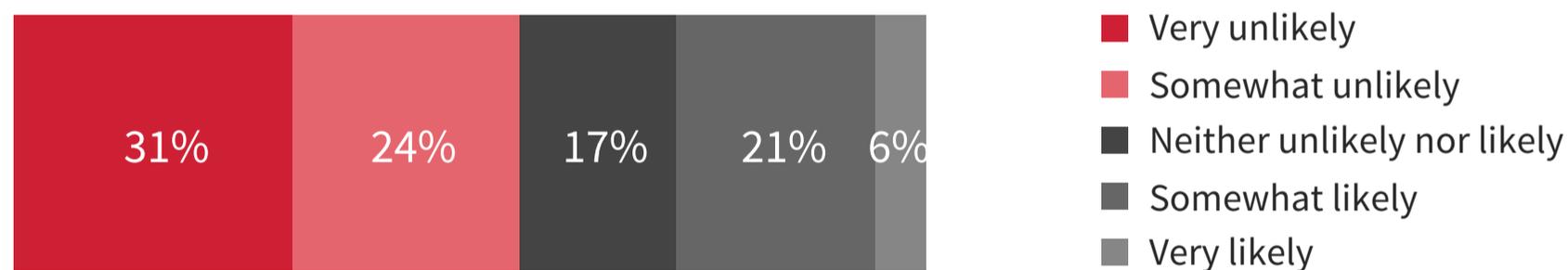
### Percentage who “always” or “frequently” use technology following the meal to...



With loyalty topping the post-meal charts, should you rush to develop an app for your restaurant or group for your guests to download? For most in the industry, the answer is likely no.

In fact, just 6 percent of diners say they are ‘very likely’ to download the app of an individual restaurant or restaurant group, while 56 percent are ‘very unlikely’ or ‘unlikely’ to do it. Top reasons to skip app downloads include lack of phone storage space and preference for using apps that aggregate information from multiple restaurants. If you do pursue the app route, make sure you’re providing real value to your guest so there’s a reason for them to adopt it – and keep it when they start running out of space on their device.

### **How likely are you to download the app of an individual restaurant or restaurant chain to your smartphone or tablet?**



# The Magic Wand

To finish, we asked our diners the all-important question: if you could wave a magic wand to improve anything at all before, during or after the dining experience, what would it be?

The word cloud below gives you a sense of the most popular answers across over 3,500 answers. The size of the word reflects the frequency of mention.

Attention Ingredients Think Access Staff Wine List  
Seating Ahead Service Easier Order  
Payment Table Reviews Restaurant  
Waitlist Technology App Check  
List before Arriving Waiter Menu Items Pay the Bill  
Loyalty Specials Mind Dining Experience

The most common responses echoed our earlier questions, with the most mentions going to options like adding yourself to the waitlist, choosing a table, paying with your phone and alerting the waitstaff to your needs. But the joy of this question really came in some of the more creative – and occasionally hilarious – responses. Here are a few of our favorites.

### **1. REAL-TIME KLOUT**

“To get promos or freebies because of my social media influence! :)”

### **2. NEXT-GEN UBER/LYFT**

“Teleportation to and from the venue! Better than the Star Trek experience (more Concierge / 5-star quality)”

### **3. ANTI-SOCIAL APP**

“To not be seated near people who are loud and intrusive.”

### **4. CULINARY TMZ**

“Advance information about when “the” chef was to be present at a fine dining restaurant.”

### **5. NOISE CANCELLATION**

“Ability to soundproof my table so as to converse with table mates.”

### **6. HIRING HEAVEN**

“A technology that hires nicer greeters and wait staff.”

### **7. CULTURE DETECTOR**

“Have a rating system that describes how happy the staff are.  
Service makes or breaks the meal.”

## **8. REAL-TIME FEEDBACK**

“It would be nice to text/email the manager real-time with compliments or complaints.”

## **9. NUTRITIONAL KNOW-IT-ALL**

“To have access to nutritional information and calorie counts for items on the menu.”

## **10. I’LL HAVE WHAT SHE’S HAVING**

“I would like to know what everyone has been ordering that evening. If it is popular, I would try it.”

## **11. SSSSHHHH!**

“I would like restaurants to be able to “Silence” incoming phone calls to other guest. Voice conversations should not be allowed while dining - only text conversations.”

## **12. QU’EST-CE QUE C’EST?**

“Quick translation services when eating international [food].”

## **13. A SPECIAL KIND OF APP**

“Allow restaurants to push a single SMS “special” occasionally to whet one’s appetite for that restaurant.”

## **14. REVIEWBUSTER APP**

“I would magically verify that all reviews of a restaurant were legitimate and provided some value to the restaurant and potential diners. The magical process would delete reviews that are just trolls or provide no constructive value (By the way, I am not involved in the restaurant industry in any way).”

## **15. THANKS FOR THE MEMORIES**

“After visit, special memorial video and photos taken and edited by robot and computer is sent as an option with low cost.”

## **16. THE DINER-RATER**

“I always show or cancel using your site. I do not just not show up. Yet I always still receive telephone calls the day before asking me to confirm that I will be there, which can be annoying. I would be happy if you gave [restaurants] my rating and let them know that I am a good diner with a good history of honoring my reservations.”

## **17. GREAT MINDS DRINK ALIKE**

“Cocktails in a self-driving car over to the restaurant”

“An app to tell you which bars are walking distance and are happening at the time...”

## 18. THANKS BUT NO THANKS

Interestingly, and perhaps reassuringly, the magic wand question also provided respondents with a place to ask for *less* technology rather than more. A few of the most memorable answers:

“This survey is scaring me -- please do not take the human interaction out of the dining experience! I always ask the wait staff for food and wine recommendations, and I enjoy getting to know staff at my favorite places. I have technology fatigue and go to restaurants to get away from it.”

“Unless your dinner date is your smart phone, dining should be a human experience to be savored, not selfied!”

“I want to have a nice meal with wine and not have everyone around me whining into their phones, snapping photos, texting, and generally acting like imbeciles...”

“My magic wand would turn anyone who used a device at the table into a frog for the next 24 hours. THAT would be awesome!!!!”

# Conclusion

All in all, our survey illuminates the growing role that technology plays in powering great dining experiences, and calls out some compelling opportunities for restaurant operators. Here are three closing thoughts.

**Above all, US diners depend on technology for restaurant discovery. Make sure you are in the mix.**

It has never been more vital to put your best digital foot forward so that your next crop of diners can find you, browse your menu, visualize your property, read your reviews and include you in their consideration set.

**To continue delighting your diners, keep your finger on the pulse of dining technology – in a way that fits your concept.**

Our survey confirms that casual-oriented restaurants may have more opportunities to incorporate technology into their experiences – but consumers see technology as relevant even in the world of fine dining. Given broad diner appeal, hotter trends like mobile payments should ultimately have widespread application, regardless of setting.

**Regardless of where technology takes us, there is no substitute for good old-fashioned, human-delivered hospitality.**

The verbatim feedback from our 6,000 plus respondents underscores that making your guests feel special throughout their meal is as critical as it's ever been. Technology can help on the margin of course, by helping staff be more responsive and allowing diners to provide more input into their experience – but as you consider tech investments, don't skimp on training your staff to deliver the type of hospitality that will keep your guests coming back.

# About OpenTable

**OpenTable** is the world's leading provider of online restaurant reservations, seating more than 16 million diners per month via online bookings across more than 32,000 restaurants. Since inception in 1998, we have seated more than 830 million diners around the world.

Our network connects restaurants and diners, helping diners discover and book the perfect table and helping restaurants deliver personalized hospitality to keep guests coming back.

OpenTable's hospitality solutions enable restaurants of all shapes and sizes to manage their reservation books, streamline their operations, and enhance their service levels. For more information on how we can help you grow your restaurant business and deliver an extraordinary guest experience, go to <http://restaurant.opentable.com>

# Additional Resources

Open for Business – check out our blog packed with tips, resources and fresh ideas for running a successful restaurant

[openforbusiness.opentable.com](http://openforbusiness.opentable.com)

ROI Calculator – see how OpenTable can bring you new diners and contribute to your bottom line

[restaurant.opentable.com/roi](http://restaurant.opentable.com/roi)

Get Your Restaurant in Shape – download our free e-book to improve your marketing, operations, hospitality and more in 30 days

[go.opentable.com/30dayebook.html](http://go.opentable.com/30dayebook.html)

# Appendix

# Googling Your Guests: Creepy or Cool?

## Results by Metro Area

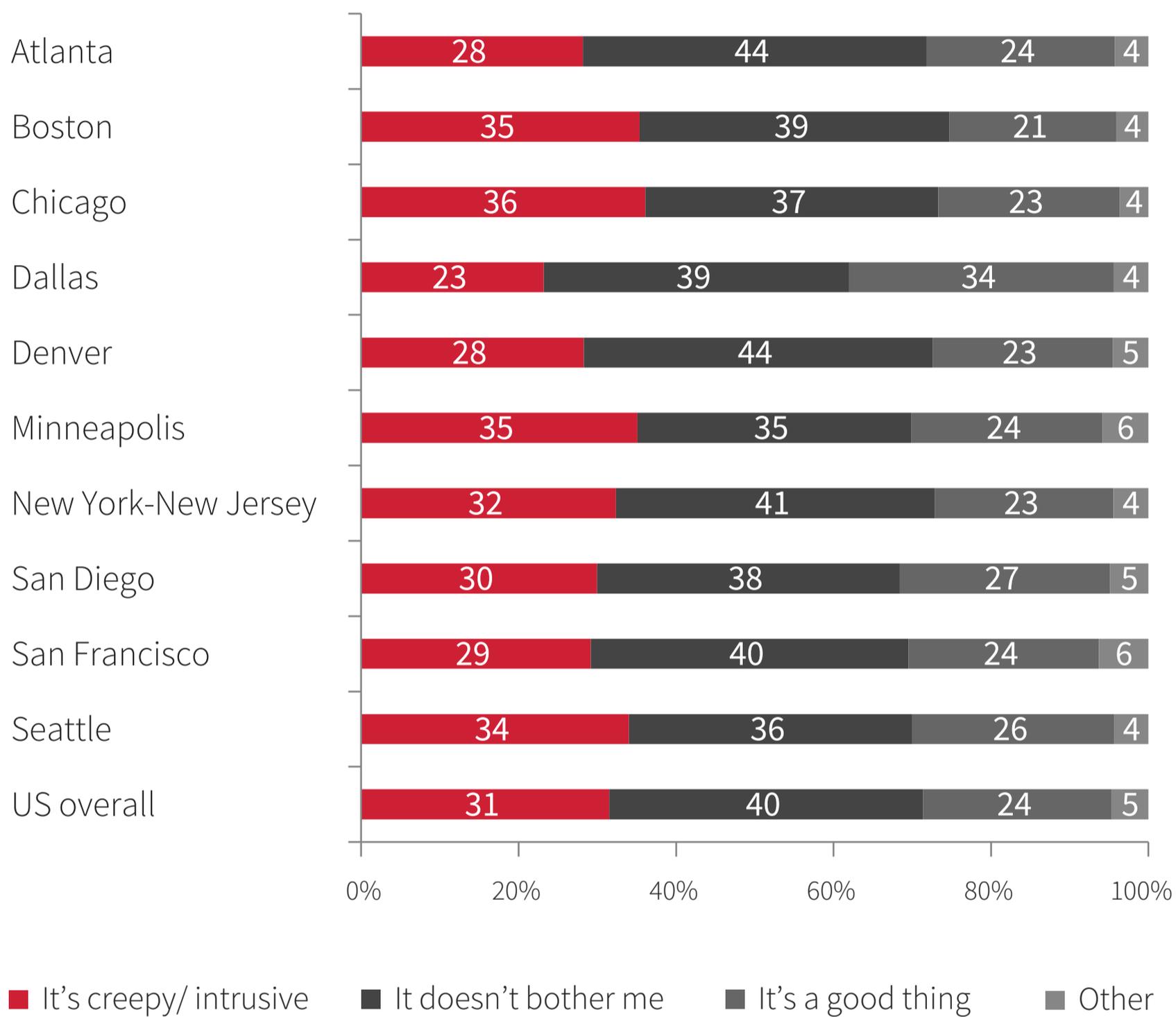
When we break down the results of our ‘creepy or cool?’ question, we see some interesting variances by city and metro area.

Dallas diners most embrace the idea of being researched by restaurants they are about to visit. In fact, Dallas is the only city in the country where the percentage of people who see this as a good thing (34 percent) outweighs those who consider it creepy or intrusive (23 percent).

San Diego diners also seem less bothered than other markets about this practice, with the ‘creepy’ camp (30 percent) only slightly outweighing the ‘cool’ camp (27 percent).

On the other hand, cities further north appear more conservative on the topic, with Boston (35 percent ‘creepy’, 21 percent ‘cool’), Chicago (36 percent ‘creepy’, 23 percent ‘cool’) and Minneapolis (35 percent ‘creepy’, 24 percent ‘cool’) displaying the most concern.

**Some restaurants research their guests online prior to the evening, with a view to better serving them. Which of the following best describes how you feel about that?**

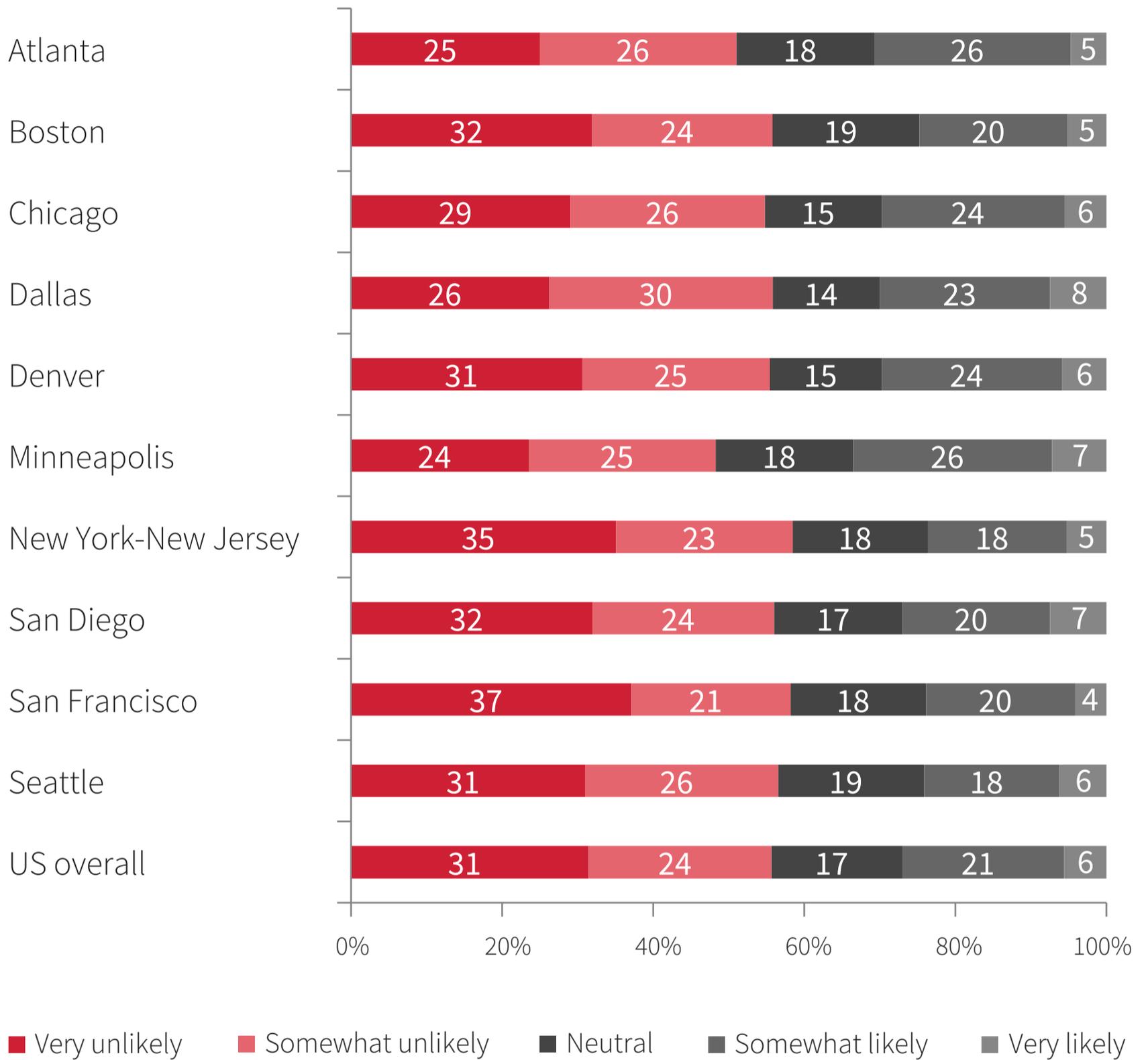


# Likelihood to Download Restaurant-Specific Mobile Apps by Metro Area

On the topic of mobile apps for individual restaurants and restaurant groups, results are fairly uniform across the different metro areas where we surveyed, with the ‘unlikelys’ outweighing the ‘likelies’ everywhere.

The cities that seem least drawn to mobile apps are San Francisco and New York, where 58 percent of respondents describe themselves as ‘very unlikely’ or ‘somewhat unlikely’ to download a restaurant-specific app. Minneapolis emerges as the city where the highest proportion of diners say they are likely to download such an app (33 percent) – but even there, only 7 percent are ‘very likely’.

**How likely are you to download the app of an individual restaurant or restaurant chain to your smartphone or tablet?**



# Nine Insights You Should Know About Diners in...

## ATLANTA<sup>1</sup>

- 1. They're bullish about technology's potential for fine dining and full-service casual.** 51 percent of Atlanta diners think technology can play a bigger role in enhancing the fine dining experience and 75 percent see technology enhancing the full-service casual experience.
- 2. They're very active online pre-dinner.** Their top six regular actions: 1) make a reservation (89 percent); 2) find a restaurant (88 percent); 3) check out a menu (83 percent); 4) get directions (63 percent); 5) read diner reviews and look at pictures (tied at 58 percent).
- 3. They're wild about waitlists.** The top six things they wish they could do before dining out using tech are: 1) add themselves to a waitlist and know how long the wait is (tied at 85 percent); 3) book at a hard-to-get-into restaurant (79 percent); text the restaurant in advance (71 percent); choose their table (65 percent); and see menu specials (61 percent).
- 4. They're relatively interested in sharing dining preferences.** Atlanta diners are likelier than average to want restaurants to know who to give the check to (25 percent), what they ordered on their last visit (19%) and their food/cuisine favorites (17 percent).
- 5. They're more relaxed than most about restaurant sleuthing.** 28 percent find it 'creepy or intrusive' that a restaurant might Google them in advance; 24 percent say it's a good thing.
- 6. They like taking photos during the meal, but share them less often.** Atlanta diners are 13 percent likelier than average to take a picture during the meal purely to remember the experience (26 percent regularly do) - but 23 percent less likely to share photos on social (as 11 percent say they do).
- 7. They're relatively jazzed about mobile payments.** 16 percent have paid at a restaurant via mobile phone before; 14 percent of them either liked it or felt neutral. Meanwhile, 47 percent haven't tried it but like the sound of it.
- 8. They're review-happy.** 15 percent always or frequently post an online review following their meal: 16 percent higher than the national average.
- 9. They're less excited about individual restaurant apps.** 51 percent are unlikely to download them, while 31 percent say they are likely to do so.

<sup>1</sup>Based on the responses of 306 diners based in the Atlanta metro area, 2015

# Eight Insights You Should Know About Diners in...

## BOSTON<sup>2</sup>

- 1. They love their menus.** Checking out the menu (89 percent) topped the list of regular pre-meal online activities for Bostonians, followed by making reservations (86 percent), finding a restaurant (85 percent), reading other diners' reviews (63 percent) and getting directions and looking at restaurant pictures (tied at 57 percent).
- 2. They covet waitlist visibility.** 86 percent would love to know how long the wait for a table is before they dine out. 84 percent wish they could add themselves to the waitlist; 78 percent would like to book at hard-to-get-into restaurants; 69 percent wish they could text the restaurant in advance; and 66 percent would love to choose their table.
- 3. They're more reserved about what restaurants know.** In line with other markets, 62 percent of Bostonians would like to share seating preferences with restaurants. However, 22 percent would prefer restaurants not to know anything about them – which is 22 percent higher than the national average.
- 4. They're comparatively creeped out by restaurants researching them.** 35 percent find the notion of being Googled by dining establishments 'creepy or intrusive', while 21 percent think it 'a good thing if it leads to better service'.
- 5. They use less social media during their meal.** Boston diners are 24 percent less likely than the national average to check in at the location on social, 35 percent less likely to share on social using text-only, and 37 percent less likely to share on social using photos.
- 6. They're moderately intrigued by mobile payments.** 5 percent have paid in a restaurant on mobile and enjoyed the experience; a further 47 percent say they haven't yet, but like the notion.
- 7. They're less engaged with restaurant loyalty programs.** Post-meal, less than 14 percent of Boston diners always or frequently engage with the restaurant's loyalty program – 29 percent lower than the national average.
- 8. They're not sold on individual restaurant apps.** 56 percent say they're unlikely to download an app for an independent restaurant or restaurant chain, compared to the 25 percent who are likely to do so.

<sup>2</sup>Based on the responses of 571 diners in the Boston metro area, 2015

# Eight Insights You Should Know About Diners in...

## CHICAGO<sup>3</sup>

- 1. Chi-town is reservation town.** Making a reservation tops the list of regular pre-meal activities for Chicagoans (88 percent). Finding a restaurant (86 percent) and checking out the menu (84 percent) are also very common, with looking at restaurant pictures and reading reviews by other diners rounding out the top five (55 percent each).
- 2. They're wishing for waitlist access.** 87 percent would love to know how long the wait for a table is before they arrive, and 84 percent wish they could add themselves to the waitlist before they arrive. Meanwhile, 80 percent wish they could book at hard-to-get-into restaurants using technology.
- 3. They'd love to share their seating preferences with you.** 58 percent would be happy if restaurants knew where they preferred to sit, and 44 percent want you to know their special dates.
- 4. They're fairly creeped out about being Googled.** 36 percent find the notion of being researched by a restaurant 'creepy or intrusive', while 23 percent think it 'a good thing if it leads to better service.'
- 5. They're social photo sharers.** One in four Chicago diners regularly takes photos during the meal. 17 percent of diners often share those photos via social during the meal – nearly 20 percent higher than the national average.
- 6. They're intrigued by mobile payments.** While just 12 percent of Chicago respondents say they've tried paying for a meal using their phone, a further 46 percent like the idea of doing it in future.
- 7. They're loyalty loyalists.** 26 percent say they always or frequently interact with a restaurant's loyalty program following the meal, compared to our national average of 18 percent.
- 8. They're lukewarm on restaurant-specific apps.** 54 percent say they're unlikely to download them, compared to the 30 percent who say they're likely to do it.

<sup>3</sup>Based on the responses of 735 diners in the Chicago metro area, 2015

# Eight Insights You Should Know About Diners in...

## DALLAS<sup>4</sup>

- 1. They're highly active online pre-meal.** The top answers for how Dallas diners use tech-pre-meal are in line with national results: 88 percent make reservations, 87 percent find restaurants, and 85 percent check out menus. But Dallas scores are way higher than elsewhere in a few categories. For instance, diners are 65 percent likelier to post in social media about an upcoming meal (as 16 percent do) and 30 percent likelier to make special arrangements for meals using technology (as 47 percent say they do).
- 2. Waitlist? Thumbs way up.** As in other metro areas, Dallas diners' top wish pre-meal is to know how long the wait for the table is (88 percent), followed by adding themselves to the list before they arrive (86 percent).
- 3. They'd love restaurants to know more about them.** Dallas diners show a relaxed attitude to sharing info with restaurants. Aside from seating preferences (69 percent), diners would like restaurants to know about their special dates (50 percent), who to give the check to (29 percent), what they ordered last time (26 percent) and their signature drink (23 percent). All of these are significantly higher than the national average.
- 4. Pre-dinner research? Bring it on.** Dallas is the only market in which the percentage of people who think being researched by restaurants is a good idea (34%) outweighs those who find it creepy or intrusive (23%).
- 5. They're a community of in-meal sharers.** Relatively high numbers of Dallas diners say they routinely check in at the restaurant on social media (26 percent), share on social using photos (22 percent) and text-only (21 percent) – and even post a review while still at the restaurant (10 percent).
- 6. They're on-table touchscreen pros.** 68 percent of Dallas diners have tried using on-table touchscreens to order a meal – more than any other metro. It's not all smooth sailing though – 20 percent say they tried it and disliked it.
- 7. Post-meal, it's time for reviews and rewards.** Dallas diners are 36 percent likelier than the US average to post a review online following a meal (as 17 percent say they do) and 54 percent likelier to interact with a restaurant's loyalty program (as 27 percent say they do).
- 8. Individual restaurant apps are still met with apathy.** Despite their dining tech propensity and loyalty program love, Dallas diners don't seem much likelier to download restaurant-specific apps. 8 percent say they're 'very likely' to do it; 56 percent still remain unlikely to download.

<sup>4</sup>Based on the responses of 246 diners in the Dallas metro area, 2015

# Eight Insights You Should Know About Diners in...

## DENVER<sup>5</sup>

- 1. Pre-meal, everyone's a critic.** Denver diners' most common online activities pre-meal are making reservations (88 percent), finding restaurants (86 percent) and checking out menus (85 percent). However, they seem less likely than other markets to check out professional critics, and are 33 percent likelier to consult online reviews from other diners.
- 2. Their top wishes are waitlist-related.** Like most other markets, Denver diners mostly wish they could add themselves to the waitlist or know how long the wait for a table is (tied at 87 percent).
- 3. They're eager to share seating preferences.** When it comes to letting restaurants know more about them, Denver results are in line with national averages. 64 percent would like restaurants to know their seating preferences, and 45 percent would be willing to share special dates like birthday and anniversary.
- 4. Restaurant sleuthing? Maybe.** 28 percent find it 'creepy or intrusive' that a restaurant might Google them in advance; 23 percent say it's a good thing.
- 5. Phones are less a factor during the meal.** Just five percent of Denver diners say they reach for their phone three or more times during a fine dining experience; only 16 percent interact with their phone three plus times in a full-service casual setting. Correspondingly, when it comes to using phones for dining-related activities during a meal, Denver scores are 21 to 32 percent lower across the board. Perhaps they're focused on the moment?
- 6. Mobile payments have promise.** 14 percent have already tried mobile payments in a restaurant and the majority like it. 46 percent more say they haven't tried it, but like the sound of it.
- 7. Post-meal? No big deal.** As with during the meal, Denver diners seem less inclined to jump online after the meal for related activity. For instance, just 12 percent of Denver diners say they typically share their experience on social media following a meal – that's 20 percent lower than average.
- 8. Little appetite for restaurant specific apps.** As elsewhere, Denver diners don't seem too enthused with the notion of downloading an app for an individual restaurant or chain. 56 percent say they're unlikely to download, while 30 percent say they are likely to do so.

<sup>5</sup>Based on the responses of 847 diners in the Denver metro area, 2015

# Nine Insights You Should Know About Diners in...

## MINNEAPOLIS<sup>6</sup>

- 1. Online reservations rule.** Minnesotans' three favorite pre-meal tech uses are making a reservation (as 85 percent 'always' or 'frequently' do), finding a restaurant (82 percent) and checking out menus (82 percent). They are among the least likely diners to consult a professional review online, which 42 percent regularly do; 54 percent will read other diners' reviews however.
- 2. They're wishing for waitlist features.** 88 percent of Minneapolis diners wish they could add themselves to a restaurant waitlist before they arrive, and 86 percent wish they could see how long the wait for a table is.
- 3. Mine's a [fill in the blank].** Overall Minneapolis diners are less likely to want to share too many personal details with restaurants, although 18% would like their dining establishment to know their signature drink – that's 16 percent higher than the national average.
- 4. They're leery about being looked at.** 35 percent find the notion that a restaurant would research them online before a meal 'creepy or intrusive', while 24 percent think it's 'a good thing if it leads to better service'.
- 5. They're less wrapped up in their phones during dinner.** Only six percent of Minneapolis respondents say they interact with their phone three or more times during a fine dining meal (41 percent lower than the national average), and 16 percent say they use their phone three plus times in a full-service casual restaurants, compared to 22 percent nationally.
- 6. They aren't mobile payments regulars yet.** Just one percent of Minneapolis diners say they 'always' or 'frequently' use their phone to pay for a meal in a restaurant – so clearly a lot of room for growth.
- 7. However, they are warming up to the idea of paying by phone.** 14 percent have tried using a phone to pay at least once; and 42 percent haven't tried but like the sound of doing so in future.
- 8. After the meal, loyalty's the deal.** Minneapolis diners are relatively likely to interact with a restaurant's loyalty program using technology after the meal, with 25 percent saying they 'always' or 'frequently' do so – making them 44 percent likelier than the average US diner.
- 9. They show slightly more app appetite.** While the nays still outweigh the ayes, Minneapolis diners seem relatively more interested in apps from individual or chain restaurants. One in three say they are likely to download such apps – compared a to a national average of 27 percent.

<sup>6</sup>Based on the responses of 326 diners in the Minneapolis metro area, 2015

# Nine Insights You Should Know About Diners in...

## NEW YORK-NEW JERSEY<sup>7</sup>

- 1. They're hungry for all kinds of critics.** In addition to regularly making online reservations (89 percent), finding a restaurant (88 percent) and checking out the menu (87 percent), New York-New Jersey diners are relatively more likely to go online to consult both professional critics (54 percent) and amateur ones (64 percent).
- 2. They want help getting the impossible table.** New York-New Jersey was one of only two markets in which using tech to book at hard-to-get-into restaurants was the top wish at 83 percent, tied with knowing how long the waitlist is. In a market oozing with hot tables, that comes as little surprise.
- 3. They wish restaurants knew a whole lot more...** New York area diners are likelier to wish restaurants knew their seating preferences (72 percent), their special dates (46 percent) and who to give the check to (29 percent). Just 12 percent say they don't want a restaurant knowing anything at all.
- 4. ...Yet they're somewhat wary of restaurant research.** 32 percent find the notion that a restaurant might Google them in advance 'creepy or intrusive', while 23 percent think it's 'a good thing if it leads to better service.'
- 5. Phones are an in-meal factor.** New York-New Jersey diners are 37 percent likelier than the national average to interact with their phone three plus times in a fine dining restaurant, and 22 percent likelier to interact with phones three plus times in a full-service casual setting.
- 6. They're a sharing bunch.** Our New York-New Jersey respondents are 15-20 percent likelier than average to engage in social activity on their phones during meals – from checking in to sharing content, both text and photos.
- 7. Mobile payments sounds promising.** While only 10 percent have tried paying by phone in a restaurant to date, a further 47 percent haven't tried it but like the sound of it.
- 8. Less loyalty, more friends post-meal.** Only 13 percent regularly use tech to interact with a restaurant's loyalty program following a meal, which is 25 percent lower than the national average. On the other hand, one in five use tech to coordinate post-meal plans with friends – 18 percent above average.
- 9. Individual restaurant apps? No thanks.** This crowd is among the most skeptical when it comes to apps for individual restaurants and chains. 35 percent describe themselves as 'very unlikely' to download such an app compared to the six percent who are 'very likely'.

<sup>7</sup>Based on the responses of 1,275 diners in the New York-New Jersey area, 2015

# Eight Insights You Should Know About Diners in...

## SAN DIEGO<sup>8</sup>

**1. They're highly active online before dinner.** From reading reviews to posting in social media, San Diego diners score higher than the national average in every category of pre-meal online activity. Their top three picks are making a reservation (91 percent), checking out a menu (90 percent) and finding a restaurant (88 percent). They are the most bargain-driven diners in our survey, with 52 percent regularly researching deals and offers pre-meal; and they are also the likeliest to consult restaurant photos (68 percent).

**2. Waitlist tops their pre-dinner wishlist.** As with most of the country, San Diegans most wish they could know how long the wait for a table is (84 percent); and add themselves to the waitlist before they arrive (80 percent). They also rate the idea of choosing their own table higher than any other metro, with 74 percent of respondents wishing they could do so.

**3. They'd like to share info with restaurants.** Sharing information on seating preferences (72 percent) and who to give the check to (29 percent) scored comparatively highly, and only 12 percent said they'd prefer restaurants to know nothing about them in advance.

**4. They're relatively more relaxed about being researched.** 30 percent find the notion of restaurants researching them 'creepy or intrusive', while 27 percent think it's 'a good thing if it leads to better service.'

**5. They claim to be restrained on the phone...** 66 percent of San Diego diners say they 'rarely or never' interact with their phones in a fine dining setting, and 45 percent give the same answer for full-service casual restaurants.

**6. ...And yet they tend toward real-time online research.** Three out of ten respondents say they 'always' or 'frequently' decide what to order during the meal by leveraging online resources like photos and reviews. That's 22 percent higher than the national average.

**7. They're seasoned users of on-table touchscreens.** 65 percent have used on-table touchscreens to place an order in at least one restaurant. 26 percent enjoyed the experience, 27 percent were neutral on it, and only 12 percent didn't care for it.

**8. They love to write reviews.** 18 percent say they 'always' or 'regularly' write a post-meal review of their experience, which is 43 percent higher than the US average.

<sup>8</sup>Based on the responses of 252 diners in the San Diego area, 2015

# Eight Insights You Should Know About Diners in...

## SAN FRANCISCO<sup>9</sup>

- 1. They see room for tech to improve dining experiences.** SF diners are slightly more bullish on how technology can enhance all types of dining setting. In particular, 20 percent see a ‘much bigger role’ for technology in full-service casual restaurants, and 35 percent see a ‘much bigger’ tech opportunity in limited service restaurants (where you order at the counter and have food brought to your table).
- 2. They’re highly active online pre-meal.** San Francisco diners are more likely to do everything online before they dine out, with the exception of researching deals and offers. Their top picks: find a restaurant (which 91 percent ‘always’ or ‘frequently’ do); make a reservation (90 percent); and check out the menu (88 percent).
- 3. Top of their wishlist: hard-to-book tables.** When asked what they wish technology could do for them before they dine out, San Francisco voted most heavily to get a hand in booking at hard-to-get-into restaurants (86 percent), followed by knowing how long the wait for a table is (85 percent) and adding your name to the waitlist before you arrive (84 percent).
- 4. They’re relatively laidback about being Googled by restaurants.** 29 percent find the notion of restaurants researching them ‘creepy or intrusive’, while 24 percent say it’s ‘a good thing if it leads to better service.’
- 5. They fine dine with their phones.** 12 percent of respondents say they interact with their phones at least three times during a fine dining meal, which is 17 percent higher than the national average. Meanwhile, they claim to use phones a little *less* than the average in full-service casual settings, where 18 percent reach for their phones three times or more per meal.
- 6. They hold the most mobile payments potential.** While 14 percent say they’ve at least tried to pay for a meal in a restaurant using their phone, a further 51 who haven’t tried it yet say they like the sound of it.
- 7. They’re living the transport app dream.** 19 percent regularly order post-meal transport using technology – that’s 70 percent higher than the national average. No prizes for guessing where Uber, Lyft and Flywheel got their start.
- 8. Restaurant-specific apps don’t interest them.** San Francisco diners are the most dismissive of all respondents about apps for individual restaurants or chains. 37 percent say they are very unlikely to download them; just 4 percent say they would be very likely to do it.

<sup>9</sup>Based on the responses of 748 diners in the San Francisco area, 2015

# Eight Insights You Should Know About Diners in...

## SEATTLE<sup>10</sup>

- 1. They listen much more to amateur critics.** Before they dine out, Seattle respondents are most likely to check out a menu, make a reservation (tied at 84 percent) and find a restaurant (82 percent). Just 41 percent say they routinely read online reviews from professional critics, compared to the 54 percent who ‘always’ or ‘frequently’ read other diners’ reviews.
- 2. They are texting champs.** As elsewhere, Seattle diners most wish they could know how long the wait for a table is (85 percent), add themselves to the waitlist before arrival (82 percent) and book at a hard-to-get-into restaurant (76 percent) using technology. At 73 percent, Seattle also had the highest proportion of diners who would love to be able to text the restaurant in advance – for instance, to say they’re running late or to confirm a detail.
- 3. They’re willing to share certain info to get their favorite spot.** Two-thirds would like restaurants to know their seating preferences, and 41 percent would be interested in sharing information about their special dates.
- 4. However, they are generally wary of restaurants doing research.** 34 percent voted that being researched in advance by restaurants feels ‘creepy or intrusive’, while 26 percent see it as a good thing if it improves service.
- 5. They consult their phones less during dinner.** This is especially due in fine dining restaurants, where less than seven percent interact with their phones three or more times during the meal. It also shows up in stats around habits during the meal: for instance, Seattle diners are 14 percent less likely than average to check in at the location on social media and 20 percent less likely to make decisions on what to order using online info.
- 6. Mobile payments could potentially change that.** While only 10 percent of Seattle respondents have tried mobile payments in a restaurant to date, 49 percent haven’t tried and like the sound of it.
- 7. Despite turning to other diners’ reviews (see #2), fewer of them typically post reviews themselves.** Following a meal, only nine percent say they ‘always’ or ‘frequently’ post a review to a public site, which is 29 percent lower than the US average.
- 8. Restaurant-specific apps get a lukewarm response.** As elsewhere, those who say they are unlikely to download the app of a specific restaurant or chain (57 percent) significantly outweigh those who say they are likely (24 percent).

<sup>10</sup>Based on the responses of 304 diners in the Seattle area, 2015

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