

ZAGAT SURVEY SUMMARY

2012 London Restaurants

Number of Restaurants Surveyed:	1,187	Avg. Meals Out per Week per Surveyor:	2.4
Number of Surveyors:	5,497	Avg. Meals per Surveyor per Restaurant:	7.2
Total Restaurant Meals per Year:	684,000	Total Restaurant Meals per Day:	1,880
Gender: Male: 65% / Female: 35%		Est. # of Meals per Restaurant:	380

Most Popular:

- | | |
|-------------------------------|----------------------------|
| 1. Wolseley (3) | 6. Gordon Ramsay/Clar. (5) |
| 2. Gordon Ramsay/68 Royal (1) | 7. Hakkasan (6) |
| 3. J. Sheekey (2) | 8. Wagamama (4) |
| 4. Nobu London (8) | 9. Le Gavroche (10) |
| 5. Ivy (7) | 10. Ledbury (26) |

Best Buys:

- | | |
|-----------------------|--------------------------|
| 1. Chilango (1) | 6. Food for Thought (6) |
| 2. Franco Manca (2) | 7. Books for Cooks (5) |
| 3. Golden Hind (7) | 8. Churchill Arms (8) |
| 4. Benito's Hat (3) | 9. Leon (4) |
| 5. Princi London (10) | 10. Ed's Easy Diner (13) |

Top Food:

- | | |
|-------------------------------|-------------------------------|
| 1. Ledbury (1) | 6. Waterside Inn (11) |
| 2. Pied à Terre (13) | 7. Hunan (28) |
| 3. Dinings (7) | 8. Gordon Ramsay/68 Royal (2) |
| 4. Le Manoir/Quat'Saisons (9) | 9. Square (8) |
| 5. Le Gavroche (12) | 10. Dinner/Heston (-) |

Top Decor:

- | |
|-------------------------------|
| 1. Sketch/Lecture (6) |
| 2. Le Manoir/Quat'Saisons (5) |
| 3. Mark's Club (club) (4) |
| 4. Ritz (1) |
| 5. Sketch/Parlour (-) |

Top Service:

- | |
|-------------------------------|
| 1. Waterside Inn (4) |
| 2. Ledbury (7) |
| 3. Mark's Club (club) (1) |
| 4. Le Manoir/Quat'Saisons (8) |
| 5. Gordon Ramsay/68 Royal (3) |

Top Newcomers:

Rated

- 27 – Dinner/Heston
 26 – Koffmann's
 24 – Tinello
 23 – Savoy Grill
 Dishoom

Other Key Arrivals

- Amaranto
 Bar Battu
 Barbecoa

- Bistro du Vin
 Brasserie Joël
 Brawn
 Cantinetta
 Cassis
 Chabrot
 Cigalon
 5 Pollen St.
 Gilbert Scott
 Henry Root

- Ilia
 Kopapa
 Les Deux Salons
 Massimo
 Morito
 Nopi
 North Road
 Opera Tavern
 Pollen St. Social
 Polpetto

- Roux at the Landau
 Samarqand
 Spice Market
 Spuntino
 St. John Hotel
 Tempo
 Roux/Parliament
 Trullo
 Venosi
 Verru

Top Spots By Cuisine:

- American – Palm
 British (Modern) – Dinner/Heston
 British (Trad.) – Wilton's
 Chinese – Hunan
 Chophouses – Goodman
 Eclectic – Viajante
 European (Modern) – Fat Duck
 Fish 'n' Chips – Golden Hind
 French (Bistro) – Bar Boulud
 French (Brasserie) – Racine
 French (Classic) – Le Gavroche
 French (New) – Ledbury

- Indian – Rasoi Vineet Bhatia
 Italian – River Café
 Japanese – Dinings
 Lebanese – Ishbilila
 Mediterranean – La Petite Maison
 Mexican – Chilango
 Pizza – Osteria Basilico
 Seafood – Scott's
 Spanish – Barrafina
 Thai – Nahm
 Vegetarian – Roussillon

Average Restaurant Meals Per Week Per Surveyor:

Zagat U.S. Average: 3.1

London	Boston	Wash. D.C.	Montreal/Toronto/Vancouver	Chicago	SF	NYC	Miami / So. Fl.	Paris	LA	Texas	Tokyo
2.4	2.5	2.6	2.7	2.8	2.8	3.0	3.2	3.3	3.4	3.8	3.8

London Average Restaurant Meals Per Week Per Surveyor:

2011	2010	2009	2008
2.4	2.2	2.2	2.5

(#) - indicates its rank in the last survey

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London Meal Cost Inflation:

Survey	Average Meal Cost	Average Meal Cost, 20 Most Expensive
2011	43.40 (+6.3%)	101.24 (+5.5%)
2010	40.84 (+1.1%)	95.95 (+2.7%)
2009	40.39 (-0.4%)	93.47 (+1.9%)
2008	40.55 (+3.7%)	91.71 (+4.3%)
2007	39.09	87.90

Cost Comparisons To Other Major Cities:*

City	Avg. Meal Cost in Pounds	Avg. Meal Cost, 20 Most Expensive in Pounds	Avg. Meal Cost in Euros	Avg. Meal Cost, 20 Most Expensive in Euros	Avg. Meal Cost in U.S. Dollars	Avg. Meal Cost, 20 Most Expensive in U.S. Dollars
Tokyo	£70.87	£211.16	€ 81.85	€ 243.87	\$113.09	\$336.94
London	£43.40	£101.24	€ 50.12	€ 116.92	\$69.25	\$161.55
New York City	£26.17	£97.02	€ 30.22	€ 112.05	\$41.76	\$154.82
Miami/So. Florida	£24.98	£52.17	€ 28.85	€ 60.25	\$39.86	\$83.25
San Francisco	£24.30	£69.63	€ 28.07	€ 80.41	\$38.78	\$111.10
Chicago	£23.17	£65.77	€ 26.76	€ 75.96	\$36.97	\$104.95
Washington, DC	£22.55	£52.84	€ 26.05	€ 61.02	\$35.99	\$84.31
Los Angeles	£21.84	£55.05	€ 25.22	€ 63.57	\$34.85	\$87.84
Boston	£21.03	£47.74	€ 24.29	€ 55.13	\$33.56	\$76.18
Texas	£20.37	£45.75	€ 23.52	€ 52.83	\$32.50	\$73.00
Zagat U.S. Average	£22.26	£49.38	€ 25.71	€ 57.02	\$35.52	\$78.79

*Based on 9/9/11 exchange rate

Supplemental Questions

1. If service is not included, what % do you usually tip?

	2011	2010	2009	2008
Average	12.0%	11.8%	11.6%	12.2%

2. What irritates you most about dining out?

	2011	2010	2009	2008
Service	73%	74%	72%	62%
Prices	10%	9%	9%	14%
Food	5%	6%	7%	7%
Noise	8%	6%	5%	6%
Service charge	1%	2%	4%	4%
Crowding	1%	1%	1%	2%
Parking/getting there	-%	1%	1%	1%
Other	2%	1%	1%	4%

3. Compared to a year ago, are you eating out...?

More	19%
Same	54%
Less	27%

4. Compared to a year ago, are you spending...?

More per meal	31%
Same amount	55%
Less per meal	14%

5. What percent of your total meals out are for...?

	2011	2010	2009	2008
	Avg.	Avg.	Avg.	Avg.
Leisure	80%	81%	79%	77%
Business	20%	19%	21%	23%

6. Of 14 possible lunches & dinners in a week, how many do you:

	2011	2010	2009	2008
Skip?	0.8	0.9	0.9	1.0
Cook at home?	7.1	7.4	7.5	6.8
Eat out/take away?	6.1	5.7	5.6	6.2
Total meals eat per week:	13.2	13.1	13.1	13.0
% of meals eat out/take away:	46%	44%	43%	48%

7. How do you typically make restaurant reservations?

	2011	2010	2009	2008
Phone restaurant	59%	59%	66%	77%
Via internet	37%	35%	25%	17%
Don't reserve	4%	6%	9%	6%

8. Do you typically prefer to make a meal from...?

	2011	2010
Starter and main course	81%	86%
Small plates/tapas	19%	14%

9. What type of restaurant do you typically dine in?

	2011	2010	2009	2008
Bistro/brasserie	35%	32%	33%	36%
Casual	32%	32%	34%	33%
Haute	13%	13%	13%	12%
Gastropub	9%	12%	11%	8%
Celebrity chef's	3%	4%	4%	4%
Other	8%	7%	5%	7%

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Supplemental Questions

10. What is your favourite cuisine?

Italian	23%
French	19%
Japanese	15%
Thai	9%
British	9%
Chinese	7%
Indian	6%
Mexican	4%
American	3%
Other	5%

11. Does having a famous chef influence your decision to dine at a restaurant? Would you be...?

	2011	2010	2009
More likely to dine there	38%	32%	43%
No affect	55%	60%	51%
Less likely to dine there	7%	8%	6%

12. How important is it to you that the food you eat is "green" (i.e., locally sourced, organic, or sustainably raised)...

	2011	2010
Extremely important	5%	4%
Very important	20%	15%
Somewhat important	48%	43%
Not very important	21%	26%
Not at all important	6%	12%

13. Are you willing to pay more for "green" (i.e., locally sourced, organic, or sustainably raised) food?

	2011	2010
Yes	53%	57%
No	47%	43%

14. How often should a restaurant change its menu?

Monthly	16%
Seasonally	80%
Annually	2%
Never	2%

15. Before eating at a restaurant, do you typically visit the restaurant's website...?

Yes	78%
No	22%

16. Have you downloaded restaurant related applications to your smartphone...?

Yes	29%
No/don't have smartphone	71%

17. Do you follow restaurants via social media sites (Facebook, Twitter, etc.)?

Yes	14%
No	86%

18. When do you typically share (verbally or via website, blogs and social media) your dining experiences?

Only after good/great meals	9%
Only after notably bad experiences	3%
After good/great meals & notably bad ones	57%
After most meals – good, mediocre or bad	11%
I usually don't discuss my dining experiences	20%

19. When dining in a restaurant, how do you generally feel about diners who text, email, tweet, or talk on their mobile phone...?

It's rude and inappropriate	53%
Acceptable in moderation	42%
Perfectly acceptable	3%
No opinion	2%

20. When dining in a restaurant, how do you generally feel about diners who take pictures of their companions, food, etc...?

It's rude and inappropriate	23%
Acceptable in moderation	59%
Perfectly acceptable	15%
No opinion	3%

21. What kinds of dining deals are most likely to entice you to a restaurant? (Check all that apply)

	2011	2010
Set-price menu	48%	65%
Food discounts	51%	62%
Wine discounts	19%	24%
Happy hour	4%	9%
Other	8%	6%

22. How often do you engage in group buying discounts offered by restaurants?

Regularly	9%
Occasionally	27%
Rarely	25%
Never	39%

23. How long are you willing to wait for a table at places that do not take reservations...?

No more than 30 minutes	60%
No more than an hour	8%
As long as it takes	1%
It doesn't matter as long as there is a bar	6%
I avoid places that don't take reservations	25%

24. What do you typically do when you're dining next to noisy neighbors...?

Ignore them	50%
Ask to be moved to another table	35%
Ask the mgmt. to talk to the noisy table	10%
Politely ask them to quiet down	5%

25. Who do you think gets treated better when dining out?

Men	13%
Women	9%
They're treated equally	78%

26. Should restaurants be required to a post rating in their window reflecting the results of their food hygiene inspection?

Yes	70%
No	30%

27. Compared to a year ago, do you think London's current dining scene is...?

Better	38%
Same	57%
Worse	5%

28. Using a scale of 0-3, how would you rate London's current dining scene based on...?

	2011 Avg.	2010 Avg.	2009 Avg.	2008 Avg.
Culinary creativity	22	21	20	21
Hospitality	13	12	12	12
Choice/diversity	25	25	25	25
Table availability	13	14	14	12