

ZAGAT SURVEY SUMMARY

2007 New York City Restaurants

Number of Restaurants Surveyed:	2,014	Gender:	
Number of Surveyors:	31,604	Male:	46%
Total Restaurant Meals per Year:	5.6 Million	Female:	54%
		Age:	
Avg. Meals Out per Week per Surveyor:	3.4	20s:	15%
Avg. Meals per Surveyor per Restaurant:	11.0	30s:	28%
Total Restaurant Meals per Day:	15,300	40s:	18%
Est. # of Meals per Restaurant:	2,100	50s:	20%
		60+:	19%

Top Newcomers:

<u>Rated</u>	<u>Other Major Arrivals</u>	
25 – Telepan Orchard, The Ureña	Barça 18 Blaue Gans Brasserie Ruhlmann	Fatty Crab Harry's Steak Industria Argentina
24 – A Voce	Buddha Bar	Japonais
23 – Morimoto Country Del Posto Cookshop Buddakan Bouchon Bakery	Chinatown Brasserie Colors Craftsteak Dani Degustation Destino	L'Atelier/Joël Robuchon Le Cirque Little Owl Parea Porter House NY Quality Meats
22 – Café d'Alsace Antonucci Phillippe	Devin Tavern Dona Dressler	Sfoggia Trestle on Tenth Valbella

Ten Most Popular Places (2006 rank):

1. Gramercy Tavern (1)
2. Union Square Cafe (2)
3. Le Bernardin (5)
4. Babbo (3)
5. Peter Luger (9)
6. Bouley (8)
7. Gotham Bar & Grill (6)
8. Daniel (4)
9. Jean Georges (11)
10. Blue Water Grill (7)

Top Ten Food Rankings (2006 rank):

1. Le Bernardin (1)
2. Daniel (2)
3. Sushi Yasuda (5)
4. per se (3)
5. Peter Luger (Brooklyn) (8)
6. Gramercy Tavern (6)
7. Café Boulud (13)
8. Bouley (4)
9. Jean Georges (9)
10. Annisa (24)

Top Five Decor Rankings (2006 rank):

1. Daniel (1)
2. Asiate (7)
3. Rainbow Room (2)
4. River Café (6)
5. Buddakan (-)

Top Five Service Rankings (2006 rank):

1. per se (1)
2. Le Bernardin (2)
3. Daniel (3)
4. Alain Ducasse (9)
5. Gramercy Tavern (4)

Top Restaurants By Cuisine:

American – per se	Kosher – Prime Grill
American (Regional) – Pearl Oyster/NE	Mediterranean – Picholine
Barbecue – Daisy May's	Mexican – Mexicana Mama
Caribbean/West Indies – A	Middle Eastern – Taboon
Chinese – Phoenix Garden	Noodle Shops – Honmura An
Coffeehouses – Ferrara	Pizza – Di Fara
Cuban - Café Habana	Raw Bars – Aquagrill
Delis – Barney Greengrass	Seafood – Le Bernardin
Dessert – ChikaLicious	Small Plates – Stanton Social
Dim Sum – Oriental Garden	South American – Caracas
French – Le Bernardin	Southern/Soul – Amy Ruth's
French (Bistro) – db Bistro Moderne	Southwestern – Mesa Grill
Greek – Milos	Spanish/Tapas – Casa Mono
Hamburgers – burger joint/Parker M.	Steakhouses – Peter Luger
Hotel Dining – Café Boulud	Thai – Sripraphai
Indian – Tamarind	Turkish – Turkish Kitchen
Italian – Roberto's	Vegetarian – Candle 79
Japanese/Sushi – Sushi Yasuda	Vietnamese – O Mai
Korean – Hangawi	

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Average Restaurant Meals Per Week:

Zagat U.S. Average: 3.3

Lon- don	Bos	Phil	Mont./ Toron./ Vanc.	NJ	Paris	CT	DC/ Balt	Chi	SF	New Orl	NYC	Atl	San Anto- nio	LA	LV	Mia./ So. Fl	Austin/ Hill Cntry	Dal./ FW	Hous- ton
2.4	2.7	2.7	2.7	2.9	2.9	3.0	3.0	3.2	3.2	3.3	3.4	3.7	3.7	3.8	3.8	3.8	4.0	4.0	4.2

Average Percent Tip:

Zagat U.S. Average: 18.8%

LA	SF	TX	West./ HRV	Miami/ So. Fl	New Orl	Bos	CT	Long Isl.	NYC	Chi	NJ	DC/ Balt	LV	Atl	Phil
18.4	18.4	18.7	18.7	18.8	18.8	18.9	18.9	18.9	18.9	19.0	19.0	19.1	19.1	19.2	19.4

New York Restaurant Openings and Closings Trend:

	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992	1991	1990
Openings	222	247	226	174	186	221	311	274	277	275	265	305	196	171	145	110	125	125
Closings	102	83	93	91	104	80	89	96	117	91	129	103	69	68	45	57	54	38
Differential	120	164	133	83	82	141	222	178	160	184	136	202	127	103	100	53	71	87

Service Deficit:*

City	Avg. Food Rating	Avg. Service Rating	Service Deficit
Tokyo	19.02	14.53	4.49
Montréal	22.10	19.13	2.97
New Orleans	20.14	17.74	2.40
Houston	21.67	19.28	2.39
San Francisco	21.34	18.97	2.37
New York	20.53	18.24	2.29
Austin/Hill Country	21.62	19.37	2.25
Boston	20.88	18.77	2.11
Seattle	20.25	18.20	2.05
London	20.37	18.47	1.90
New Jersey	21.09	19.12	1.97
Washington, DC	20.72	18.77	1.95
Baltimore	21.79	19.87	1.92
San Antonio	21.13	19.26	1.87
Los Angeles	20.34	18.49	1.85
Chicago	20.84	19.05	1.79
Atlanta	20.57	18.80	1.77
Toronto	21.91	20.16	1.75
Long Island	20.42	18.70	1.72
Philadelphia	20.37	18.67	1.70
Vancouver	22.05	20.36	1.69
Miami/So. Florida	21.01	19.33	1.68
Dallas/Ft. Worth	22.25	20.63	1.62
Connecticut	20.18	18.67	1.51
Paris	18.88	17.40	1.48
Las Vegas	21.13	19.75	1.38
Westchester/Hudson Valley	19.93	18.59	1.34
<i>Zagat U.S. Average</i>	<i>20.87</i>	<i>18.97</i>	<i>1.90</i>

*Service is the weak link in the restaurant industry. See Box Questions #2.

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Overall Average Meal Cost For Newcomers: \$40.27

New York Cost Inflation:

Survey	Avg. Meal Cost	Avg. Meal Cost, 20 Most Exp.
New York 2007	\$39.43 (+4.8%)	\$128.79 (+14.5%)
New York 2006	\$37.61 (+0.4%)	\$112.49 (+23.2%)
New York 2005	\$37.45 (+1.1%)	\$91.28* (-0.5%)
New York 2004	\$37.06 (+0.3%)	\$91.73 (+1.2%)
New York 2003	\$36.95	\$90.68

*Excludes Masa and per se.

Cost Comparisons To Other Cities:

City	Avg. Meal Cost
Tokyo†	\$75.07
London†	\$72.25
Paris†	\$67.06
New York	\$39.43
Palm Beach/Palm Beach Co.	\$38.56
Las Vegas	\$38.38
Long Island	\$36.71
San Francisco	\$35.96
Westchester/Hudson Valley	\$35.24
New Jersey	\$35.03
Ft. Lauderdale/Broward Co.	\$34.85
Washington, DC	\$34.69
Miami/Dade Co.	\$34.41
Connecticut	\$34.37
The Keys/Monroe Co.	\$33.97
Chicago	\$33.75
Dallas/Ft. Worth	\$33.36
Baltimore	\$33.20
Philadelphia	\$32.81
Los Angeles	\$31.93
Boston	\$28.88
Houston	\$27.04
San Antonio	\$26.57
Atlanta	\$26.20
Seattle	\$25.56
Austin/Hill Country	\$25.30
New Orleans	\$24.45
Zagat U.S. Average	\$32.53

City	Avg. Meal Cost, 20 Most Exp.
Tokyo†	\$206.41
London†	\$157.53
Paris†	\$191.66
New York	\$128.79
San Francisco	\$98.30
Chicago	\$90.12
Las Vegas	\$80.78
Washington, DC	\$79.47
Los Angeles	\$71.48
Philadelphia	\$70.23
Miami/Dade Co.	\$65.52
Atlanta	\$64.40
Dallas/Ft. Worth	\$64.17
New Jersey	\$64.09
Long Island	\$62.92
Westchester/Hudson Valley	\$62.39
Boston	\$62.13
Seattle	\$62.12
Palm Beach/Palm Beach Co.	\$61.49
Connecticut	\$59.44
Baltimore	\$59.03
Ft. Lauderdale/Broward Co.	\$54.28
Houston	\$54.22
New Orleans	\$52.76
San Antonio	\$48.43
The Keys/Monroe Co.	\$46.27
Austin/Hill Country	\$44.10
Zagat U.S. Average	\$66.96

†Based 9/22/06 exchange rate.

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2007 New York City Restaurants

Box Questions

1. What percent do you usually tip?

	2007	2006	2005
Average	18.9%	18.8%	18.6%

2. What irritates you most about NYC restaurants?

	2007	2006	2005
Service	48%	49%	54%
Noise/Crowds	38%	32%	28%
Prices	10%	14%	13%
Parking	1%	2%	2%
Food	1%	1%	1%
Other	2%	2%	2%

3. Compared to last year, are you eating out...?

More	33%
Same	50%
Less	17%

4. Compared to last year, are you spending....?

More per meal	54%
Same amount	39%
Less per meal	7%

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

	2007	2006	2005
Skip?	.9	.9	1.0
Cook at home?	5.4	5.3	5.3
Eat out/take out?	7.7	7.8	7.7
Total meals eat per week:	13.1	13.1	13.0

% of total meals eat out/take out:	59%	60%	59%
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6. Name your favorite cuisine:

	2007	2006	2005
Italian	28%	29%	30%
Japanese	14%	13%	14%
French	13%	14%	15%
American	13%	13%	13%
Thai	7%	8%	7%
Chinese	6%	6%	7%
Mexican	6%	6%	5%
Indian	5%	4%	2%
Other	8%	7%	7%

7. Do you seek out restaurants that have celebrity chefs?

	NYC	LA	SF
Yes	21%	15%	22%
No	79%	85%	78%

8. Are you willing to pay more for food that has been sustainably raised or procured?

	NYC	LA	SF
Yes	58%	63%	74%
No	42%	37%	26%

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

	Avg.
Leisure	84%
Business	16%

10. How do you usually make restaurant reservations?

	2007	2006	2005
Call restaurant directly	75%	80%	80%
Internet/email	12%	9%	7%
Don't usually reserve	13%	11%	13%

11. How important to you is having low-carb/no-carb menu items available when dining out?

Extremely important	4%
Very important	8%
Somewhat important	25%
Not very important	31%
Not at all important	32%

12. What is your favorite wine type?

	NYC	LA	SF
Cabernet Sauvignon	21%	24%	22%
Pinot Noir	15%	19%	24%
Syrah/Shiraz	12%	9%	8%
Pinot Grigio	9%	6%	3%
Merlot	8%	9%	6%
Riesling	7%	4%	3%
Sauvignon Blanc	6%	4%	5%
Chardonnay	6%	9%	6%
Zinfandel	4%	7%	12%
Viognier	1%	1%	2%
Other	11%	8%	9%

13.

13. If smoking were permitted in them, would you go out to restaurants...?

More often	2%
Same amount	26%
Less often	71%

14. If smoking were permitted in them, would you go out to bars...?

More often	5%
Same amount	26%
Less often	69%

15. Using Zagat's 0-30 scale, how would you rate NYC's current dining scene based on ...?

	2007	2006	2005
Culinary creativity	25	23	23
Hospitality	15	15	14
Choice/diversity	28	27	27
Table availability	13	13	13

**NEW YORK CITY RESTAURANTS
TOP 20 FOOD RATINGS
1996 –2007**

<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
29 - Bouley	28 -Aureole	28 - Daniel	28 -Le Bernardin	28 -Le Bernardin	28 -Le Bernardin
28 - Aureole	Lespinasse	Le Bernardin	Daniel	Daniel	Chanterelle
Lespinasse	Le Bernardin	Lespinasse	Lespinasse	Peter Luger	Nobu
Le Bernardin	27 -Daniel	Aureole	Chanterelle	Nobu	Sugiyama
Peter Luger	Chanterelle	Jean Georges	Nobu	Chanterelle	Peter Luger
27 - Daniel	Nobu	27 - Chanterelle	Aureole	Jean Georges	Jean Georges
Chanterelle	Peter Luger	Nobu	Peter Luger	Aureole	Daniel
La Grenouille	La Grenouille	Peter Luger	27 -Jean Georges	27 -Lespinasse	27 -Lespinasse
Union Square Cafe	Union Square Cafe	La Grenouille	La Grenouille	La Grenouille	Nobu, Next Door
Le Cirque	Gotham Bar & Grill	Les Célébrités	Union Square Cafe	Nobu, Next Door	Aureole
Il Mulino	Il Mulino	Union Square Cafe	Les Célébrités	Il Mulino	La Grenouille
Les Célébrités	Les Célébrités	Gotham Bar & Grill	Il Mulino	Union Square Cafe	Gramercy Tavern
Lutèce	26 -La Côte Basque	Gotham Bar & Grill	Gotham Bar & Grill	Gotham Bar & Grill	Union Square Cafe
Gotham Bar & Grill	La Caravelle	Il Mulino	Gramercy Tavern	Gramercy Tavern	Bouley Bakery
Nobu	Four Seasons	Soup Kitchen Int'l	Montrachet	Café Boulud	Il Mulino
Four Seasons	Montrachet	Tomoe Sushi	La Côte Basque	La Côte Basque	Gotham Bar & Grill
26 - La Caravelle	Lutèce	26 - March	Lutèce	Tomoe Sushi	Oceana
March	Gramercy Tavern	Gramercy Tavern	Gramercy Tavern	Montrachet	Four Seasons
Montrachet	Yama	La Caravelle	La Caravelle	Oceana	Café Boulud
Sushisay	March	Yama	Tomoe Sushi	26 -Four Seasons	La Caravelle
<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>
28 - Daniel	28 -Daniel	28 - Le Bernardin	28 -Le Bernardin	28 -Le Bernardin	28 -Le Bernardin
Chanterelle	Sushi Yasuda	Daniel	Bouley	Daniel	Daniel
Le Bernardin	Jean Georges	Peter Luger	Daniel	per se	Sushi Yasuda
Nobu	Le Bernardin	Nobu	Gramercy Tavern	Bouley	per se
Jean Georges	Chanterelle	Bouley	Sushi Yasuda	Sushi Yasuda	Peter Luger (Brooklyn)
27 - Gramercy Tavern	Nobu	Jean Georges	Nobu, Next Door	Gramercy Tavern	Gramercy Tavern
Aureole	27 -Gramercy Tavern	Grocery	Nobu	Nobu	Café Boulud
Peter Luger	Nobu, Next Door	27 - Gramercy Tavern	27 -Jean Georges	Peter Luger	Bouley
Gotham Bar & Grill	Peter Luger	Gotham Bar & Grill	Peter Luger	27 -Jean Georges	Jean Georges
Il Mulino	Gotham Bar & Grill	Nobu, Next Door	Alain Ducasse	Gotham Bar & Grill	27 -Annisa
Lespinasse	Bouley	Chanterelle	Gotham Bar & Grill	Chanterelle	Chanterelle
La Grenouille	Lespinasse	Tomoe Sushi	Danube	Babbo	Masa
Kuruma Zushi	Alain Ducasse	Pearl Oyster Bar	Il Mulino	Café Boulud	Gotham Bar & Grill
Bouley Bakery	Oceana	Alain Ducasse	Tasting Room	Sushi of Gari	Roberto's (Bronx)
Union Square Cafe	Sushi of Gari	Jewel Bako	Veritas	La Grenouille	Alain Ducasse
Oceana	Il Mulino	Babbo	Café Boulud	Masa	Veritas
Four Seasons	Aureole	Veritas	Aureole	Tomoe Sushi	Aureole
Tomoe Sushi	Veritas	Café Boulud	Sushi of Gari	Roberto's	Sushi Seki
Café Boulud	Babbo	Danube	Chanterelle	Grocery	Sushi of Gari
Soup Kitchen Int'l	Scalini Fedeli	Oceana	Trattoria L'incontro	Il Mulino	Nobu

**NEW YORK CITY RESTAURANTS
TOP 20 MOST POPULAR
1996 –2007**

1996

Bouley
Union Square Cafe
Aureole
Gotham Bar & Grill
Four Seasons
Café des Artistes
Peter Luger
Le Bernardin
Lespinasse
Gramercy Tavern
Chanterelle
Daniel
Le Cirque
Lutèce
La Grenouille
One If By Land
Il Mulino
Sign of the Dove
Mesa Grill
Carminé's

1997

Union Square Cafe
Aureole
Gotham Bar & Grill
Gramercy Tavern
Cafe des Artistes
Four Seasons
Le Bernardin
Daniel
Peter Luger
Chanterelle
Lespinasse
La Cote Basque
Nobu
One If By Land
La Grenouille
Sign of the Dove
Mesa Grill
Il Mulino
Park Avenue Cafe
Lutece

1998

Union Square Cafe
Aureole
Gotham Bar & Grill
Gramercy Tavern
Cafe des Artistes
Le Bernardin
Lespinasse
Four Seasons
Peter Luger
Chanterelle
Daniel
Nobu
La Cote Basque
La Grenouille
One If By Land
Aquavit
Il Mulino
Sign of the Dove
Park Avenue Cafe
Mesa Grill

1999

Union Square Cafe
Aureole
Gramercy Tavern
Gotham Bar & Grill
Le Bernardin
Daniel
Jean Georges
Four Seasons
Peter Luger
Cafe des Artistes
Nobu
Lespinasse
Chanterelle
Le Cirque 2000
La Cote Basque
One If By Land
Picholine
Aquavit
Blue Water Grill
Il Mulino

2000

Union Square Cafe
Gramercy Tavern
Gotham Bar & Grill
Aureole
Le Bernardin
Jean Georges
Four Seasons
Peter Luger
Cafe des Artistes
Nobu
Daniel
Chanterelle
Le Cirque 2000
Lespinasse
La Cote Basque
Blue Water Grill
Picholine
Bouley Bakery
Babbo
One If By Land

2001

Union Square Cafe
Gramercy Tavern
Gotham Bar & Grill
Aureole
Le Bernardin
Peter Luger
Daniel
Four Seasons
Bouley Bakery
Jean Georges
Cafe des Artistes
Nobu
Chanterelle
Blue Water Grill
Babbo
Le Cirque 2000
Balthazar
La Cote Basque
Picholine
Aquavit

2002

Union Square Cafe
Gramercy Tavern
Daniel
Gotham Bar & Grill
Peter Luger
Le Bernardin
Jean Georges
Aureole
Bouley Bakery
Four Seasons
Nobu
Cafe des Artistes
Chanterelle
Babbo
Le Cirque 2000
La Cote Basque
Blue Water Grill
Aquavit
Picholine
Balthazar

2003

Gramercy Tavern
Union Square Cafe
Gotham Bar & Grill
Daniel
Nobu
Peter Luger
Jean Georges
Le Bernardin
Blue Water Grill
Babbo
Aureole
Balthazar
Aquavit
Eleven Madison Park*
Chanterelle
Four Seasons
Picholine
Bouley
Asia de Cuba
Tabla

2004

Union Square Cafe
Gramercy Tavern
Daniel
Gotham Bar & Grill
Nobu
Blue Water Grill
Jean Georges
Babbo
Peter Luger
Le Bernardin
Balthazar
Bouley
Aureole
Eleven Madison Park
Chanterelle
Four Seasons
Tabla
Picholine
Artisanal
Atlantic Grill

2005

Gramercy Tavern
Union Square Cafe
Daniel
Gotham Bar & Grill
Blue Water Grill
Peter Luger
Babbo
Bouley
Jean Georges
Nobu
Le Bernardin
Balthazar
Eleven Madison Park
Aureole
Craft
Chanterelle
Four Seasons
Aquavit
Tabla
Artisanal

2006

Gramercy Tavern
Union Square Cafe
Babbo
Daniel
Le Bernardin
Gotham Bar & Grill
Blue Water Grill
Bouley
Peter Luger
Nobu
Jean Georges
Balthazar
per se
Eleven Madison Park
Four Seasons
Spice Market
Aureole
Tabla
Chanterelle
Rosa Mexicano

2007

Gramercy Tavern
Union Square Cafe
Le Bernardin
Babbo
Peter Luger
Bouley
Gotham Bar & Grill
Daniel
Jean Georges
Blue Water Grill
Nobu
Eleven Madison Park
per se
Rosa Mexicano
Balthazar
Modern, The
Chanterelle
Tabla
Atlantic Grill
Four Seasons

*Tied with restaurant directly above it.