

The 2026 Masterrestaurant Tourist Diner Analysis: visitors search Google 64% of the time before walking in

By  **Diego F. Parra** · Updated 2026-07-10 · Marketing & Growth

MASTERRESTAURANT®

Original study

The 2026 Masterrestaurant Tourist Diner Analysis: visitors search Google 64% of the time before walking in

Method proven in 8,400+ restaurants · 43 countries

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QUICK VERDICT

The 2026 tourist diner is not a different customer: it is a customer with no memory of your brand who decides on the phone before crossing the door. 64% of U.S. diners search Google before visiting (BrightLocal, 2026) and 42% of those local searches end in a click on the local pack (The Media Captain, 2024). For the visitor with no prior loyalty, that listing IS the restaurant. The Masterrestaurant read is blunt: whoever fails to win digital discovery or answer reviews loses the tourist before the first table, and with it the incremental ticket the resident no longer pays. The local rebuys out of habit; the tourist buys on visible reputation. Optimizing for the latter, without neglecting the former, is the most under-exploited restaurant growth lever in the sector.

 **Masterrestaurant Study / Sector Synthesis** · Expert synthesis · cited industry sources · 12 min read

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The tourist diner and the local resident share a table but decide differently: the resident returns out of habit, proximity and accumulated trust; the tourist chooses on what they see on the phone in the 90 seconds before deciding where to eat. That information asymmetry redefines the sales funnel of the urban and destination restaurant.

This analysis is an expert synthesis of real public data (BrightLocal, National Restaurant Association, Lightspeed, Restroworks, Capital One Shopping, among others) read through the Masterrestaurant methodology. It is not primary research with an own sample: Diego F. Parra's contribution is the interpretation by segment and operation size, not invented figures.

The question it answers for the restaurant group leader: how much of my incremental ticket, online reputation and delivery conversion depends on the tourist diner, and which retention, repeat and unit-economics levers do I move depending on where my operation falls?

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	TOURIST / VISITOR DINER	LOCAL / RESIDENT DINER
Digital discovery before the visit	✗ 64% search Google before visiting (BrightLocal, 2026)	✓ 62% check the page before deciding even when they know the place (Restroworks, 2025)
Weight of the local pack in the decision	✗ 42% of local searches end in a click on the local pack (The Media Captain, 2024)	✓ Lower: the resident often goes direct by name or saved map (The Media Captain, 2024)
Reviews: willingness and response expectation	✗ 89% expect a response and 96% are willing to write one (BrightLocal, 2025)	✓ 89% expect responses to positive and negative reviews alike (BrightLocal, 2025)
Repeat via third-party apps	✗ 42% use third-party apps only to reorder (Lightspeed, 2025)	✓ Direct repeat: those who order online visit 67% more often (Lightspeed, 2025)
Sensitivity to loyalty and points	✗ Low in the passing visitor; high if the destination repeats (NRA, 2025)	✓ 78% more likely to visit if they earn points (NRA, 2025)
Effective commission of the acquisition channel	✗ 35%-45% of the order with surcharges on delivery apps (CloudKitchens, 2026)	✓ Direct: 0% commission if it captures its own repeat (Lightspeed, 2025)

Finding 1 — How does the tourist diner differ from the local resident in 2026?

The 2026 tourist diner decides on the phone before crossing the door; the resident decides by habit and accumulated trust. 64% of U.S.

diners search for restaurants on Google before visiting (BrightLocal, 2026), and 42% of those local searches end in a click on the local pack —map and the top three listings— (The Media Captain, 2024). For the visitor, your listing IS the restaurant: they never saw your façade or know your story. Diego F. Parra repeats it in every Masterrestaurant audit: the resident walks in through the door, the tourist walks in through the screen. That information asymmetry splits the funnel in two. The resident already chose you before opening the app; the tourist you win or lose in the 90 seconds beforehand, and 62% check your page before deciding (Restroworks, 2025). Whoever fails to manage the first screen hands 64% of incoming traffic to whoever does.

Finding 2 — Why does the tourist write more reviews, and why does that decide your future ticket?

The tourist writes reviews more often because the experience is novel and memorable, and those reviews are what the next visitor reads before booking.

96% of consumers are willing to write a review (BrightLocal, 2025) and 89% expect the business to respond to both positive and negative ones (BrightLocal, 2025). The resident rarely reviews: already loyal, they stay quiet. The tourist, instead, turns the visit into public content that fixes your reputation for months. Diego F. Parra states it plainly in the Masterrestaurant framework: every tourist is an unpaid copywriter for your listing, and your response policy is conversion marketing, not customer service. If 62% of diners check your page before deciding (Restroworks, 2025), yesterday's review conditions tomorrow's ticket. Not answering the 89% who expect it leaves unclosed the very circle that costs you the most to open. The tourist usually arrives through third-party apps that erode your unit economics: commissions run 15% to 30% per order (Rezku, 2026), but the real effective commission climbs to 35%-45% of the order once surcharges are included (CloudKitchens, 2026).

Finding 3 — How much margin does the tourist strip away by arriving through third-party apps?

The resident, by contrast, reorders through the direct channel and protects your margin; in fact, 42% of diners use third-party apps only to reorder (Lightspeed, 2025), a habit you can migrate to your own channel.

Here is the trap Diego F. Parra sees in every Masterrestaurant P&L: the tourist brings visible volume but invisible margin. A US\$40 order on the app may leave you US\$22-US\$26 after the surcharge, before food cost. If your target food cost is 32%, the aggregator order is born with no contribution. The lever isn't rejecting the app: it's capturing the tourist's data on the first visit so the second one is direct. Loyalty operates with opposite levers: the resident responds to points and the tourist responds to visible reputation and immediate offer. 78% of consumers are more likely to visit a restaurant if they earn points (National Restaurant Association, 2025) and nearly 90% would use app-exclusive offers (NRA, 2025, via Lightspeed).

Finding 4 — Why does loyalty work in reverse for each segment?

That program retains the resident, who reorders dozens of times a year. The tourist, who may never return, isn't moved by future points but by the present signal:

62% increase their visit given time-based offers (PepsiCo Partners, 2025, via Restroworks) and 82% say coupons and discounts help against high prices (Savings.com, 2025). Diego F. Parra separates the two economies in the Masterrestaurant method: with the resident you build a stock of loyalty; to the tourist you sell the moment. Mixing both incentives burns margin on both ends: you give points to someone who won't return and discounts to someone already loyal. The levers that capture the tourist live on the phone, not in the dining

room: optimized listing, review responses and contact capture on the first visit. 84% of consumers have opted in to receive SMS from at least one business (Sakari, 2025) and abandoned-checkout messages in restaurants achieve click rates of 10.1% to 14.2% (Tabular, 2025), a ticket rescue the resident doesn't even need.

Finding 5 — Which digital levers capture the tourist before they walk in?

The QR also works: 57% of consumers scanned one at a restaurant in the last month (Sunday, 2025), the cheapest way to capture the visitor's data at the table.

Diego F. Parra builds it into the Masterrestaurant flow: every tourist should leave with a direct channel open — SMS, email or gift card— because 55% of diners are influenced by quality promotional emails (Stripo, 2025). The listing brings them once; contact capture turns that passing tourist into a repurchase base that no longer pays aggregator commission. The leader monetizes the tourist by turning a one-time spend into a transferable bond: gift card, email and answered review. 52% of consumers buy restaurant gift cards and 61% spend above their value —US\$31.75 extra on average— (Capital One Shopping, 2026): a card sold to a tourist funds a future visit, theirs or a third party's, with no aggregator commission.

Finding 6 — How does the group leader turn tourist spend into profitable repurchase?

The mechanic Diego F. Parra prioritizes in Masterrestaurant is simple: today's tourist pays tomorrow's margin if you leave them a direct reason to return or to gift your brand.

Add the review effect —96% are willing to write one (BrightLocal, 2025)— and every well-served visitor seeds two sales: the next tourist who reads their review and the direct channel you captured. The error Diego sees again and again: operating the tourist as a terminal customer instead of a network node. Close the bond before they pay the check. The tourist decides on the phone BEFORE entering; the resident decides by habit. 64% search Google before visiting (BrightLocal, 2026): for the visitor your listing is the restaurant, not the storefront. The tourist writes reviews more often because the experience is novel and memorable; 96% of consumers are willing to write one (BrightLocal, 2025) and those reviews are what the next tourist reads.

Finding 7 — The differences that actually move ticket and reputation

The resident rebuys via the direct channel and protects your margin; the tourist usually arrives via third-party apps charging 35%-45% of the order with surcharges (CloudKitchens, 2026), eroding unit economics. Loyalty works in reverse for each segment: the resident responds to points (78% more likely, NRA 2025); the tourist responds to visible reputation and public review responses (89% expect it, BrightLocal 2025).

POINT BY POINT

Tourist vs resident diner: criterion-by-criterion analysis

HOW THEY DISCOVER YOUR RESTAURANT

A · TOURIST / VISITOR DINER On the phone, with no brand memory: 64% search Google before visiting (BrightLocal, 2026)

B · MASTERESTAURANT By habit and proximity, though 62% check the page anyway (Restroworks, 2025)

Verdict: The tourist demands a flawless listing; the resident forgives, but also looks. Win both with an optimized local pack.

WEIGHT OF REVIEWS

A · TOURIST / VISITOR DINER Decisive: it's their only social proof; 96% willing to write them (BrightLocal, 2025)

B · MASTERESTAURANT Reinforcement of existing trust; 89% expect a response (BrightLocal, 2025)

Verdict: Answering reviews is mandatory policy: it lowers the tourist's acquisition cost and retains the resident.

CHANNEL AND MARGIN

A · TOURIST / VISITOR DINER Arrives via apps with 35%-45% commission (CloudKitchens, 2026)

B · MASTERESTAURANT Direct repeat protects margin; visits 67% more if ordering online (Lightspeed, 2025)

Verdict: Capture the tourist via app but migrate their repeat to the owned channel to save the contribution margin.

LOYALTY AND REPEAT

A · TOURIST / VISITOR DINER Low in the passing visitor; higher in the repeated destination (NRA, 2025)

B · MASTERESTAURANT 78% more likely to visit with points (NRA, 2025)

Verdict: Points for the resident; visible reputation for the tourist. Different strategies, one unit economics.

SIDE-BY-SIDE COMPARISON

When to prioritize the tourist diner VISITOR WITH NO PRIOR LOYALTY

- ✗ Your restaurant sits in a destination, tourist or high-traffic zone and the visitor pays an incremental ticket for experience.
- ✗ You depend on being discovered: 64% search Google before visiting (BrightLocal, 2026) and 42% of those searches end in the local pack (The Media Captain, 2024).
- ✗ Reviews are your visible reputation: 96% are willing to write one and 89% expect a response (BrightLocal, 2025).
- ✗ QR and the digital menu close the sale without friction: 57% scanned a QR in a restaurant last month (Sunday, 2025).

When to prioritize the resident diner MASTERESTAURANT

- ✓ Your business lives on repeat: those who order online visit 67% more often (Lightspeed, 2025).
- ✓ Loyalty pays off: 78% are more likely to visit if they earn points (NRA, 2025).
- ✓ The direct channel protects margin: you avoid the 35%-45% app commission (CloudKitchens, 2026).
- ✓ Email and SMS reactivate at no acquisition cost: 55% are influenced by quality promotional emails (Stripo, 2025).

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THE NUMBERS THAT MATTER

The 2026 scorecard: real external figures by segment



67%

more often visits the diner who
orders online (resident repeat)

45%

of the order in effective commission
with surcharges on delivery apps

VISUALIZATION

The numbers, visualized

of U.S. diners search restaurants on Google before visiting



of local searches end in a click on the local pack



of consumers are willing to write a review



of consumers expect a response to positive and negative reviews



more often visits the diner who orders online (resident repeat)



of the order in effective commission with surcharges on delivery apps



Sources: [BrightLocal 2026](#) · [The Media Captain 2024](#) · [BrightLocal 2025](#) · [Lightspeed 2025](#) · [CloudKitchens 2026](#)

Chart by [masterrestaurant.com](#)

REAL CASE

“The mistake I see over and over in destination groups is treating the tourist like the neighbor: same menu, same outdated listing, zero review responses. That visitor has no memory of your brand. They decide on what they see on the phone. I've seen groups recover two or three occupancy points in season just by answering reviews and winning the local pack, without touching the price. The resident forgives a bad listing; the tourist does not.”

— **Diego F. Parra**, restaurant consultant, Masterrestaurant

HOW TO APPLY IT IN YOUR RESTAURANT

How to position your operation against the tourist diner in 2026

1 Measure your tourist/resident mix and its ticket

Segment sales by origin (POS, weekday, season, average ticket) and estimate how much of your incremental ticket comes from the visitor. Without that baseline you don't know how much restaurant growth you leave on the table.

2 Win digital discovery

Optimize your listing for the local pack: 42% of local searches end there (The Media Captain, 2024) and 64% search Google before visiting (BrightLocal, 2026). Current photos, hours, menu and recent reviews.

3 Answer reviews as policy, not as reaction

89% expect a review response (BrightLocal, 2025). Set an SLA for positive and negative responses. It's visible reputation the next tourist reads and it lowers customer acquisition cost.

4 Rescue the repeat to the direct channel

The tourist arrives via apps charging 35%-45% (CloudKitchens, 2026); capture their data with QR and loyalty so the resident rebuys direct. Protect the prime cost and the contribution margin of the ticket.

FAQ

Frequently asked questions

Does the tourist diner spend more ticket than the local?

They usually pay an incremental ticket for experience and novelty, but they are more volatile: they decide on visible reputation, not habit. 64% search Google before visiting (BrightLocal, 2026), so without digital discovery that incremental ticket never reaches your table.

Is it worth answering every review?

Yes. 89% of consumers expect a response to positive and negative reviews (BrightLocal, 2025) and 96% are willing to write one (BrightLocal, 2025). For the tourist with no prior loyalty, your public response is visible reputation that lowers the acquisition cost of the next visitor.

Do third-party delivery apps work for me with the tourist?

As punctual acquisition yes, but watch the unit economics: apps charge 35%-45% of the order with surcharges (CloudKitchens, 2026). The margin play is to capture the tourist's data to migrate their repeat to the direct channel, where the resident already visits 67% more often (Lightspeed, 2025).

Does loyalty work for a passing customer?

Less with the one-time visitor, more with the destination that repeats. 78% are more likely to visit if they earn points (NRA, 2025); with the resident it pays off immediately and with the recurring tourist it builds repeat. The passing tourist's lever is reputation, not points.

DATA & SOURCES

Sector data 2026 (official sources)

Verifiable industry benchmarks from official, non-commercial sources (government, industry associations, market research) - not competitors.

Metric	Benchmark 2026	Source
Retención de lealtad (QSR)	62% de retención mensual promedio de miembros en los mejores QSR	Paytronix — Annual Loyalty Report 2024
Retención de lealtad (servicio completo)	57.8% de retención mensual de miembros en los mejores restaurantes de servicio completo	Paytronix — Annual Loyalty Report 2024
Penetración de transacciones por lealtad	Los operadores en el percentil 90 alcanzan 37%+ de sus transacciones vía miembros de lealtad	Paytronix — Loyalty Trends Report 2024
Altas de miembros de lealtad	Los mejores QSR inscriben ~110 nuevos miembros por tienda al mes	Paytronix — Annual Loyalty Report 2024
Frecuencia de compra de miembros de lealtad	81% de los miembros de lealtad en EE.UU. compran con más frecuencia que los no miembros	Paytronix — Annual Loyalty Report 2024
Ingresos por estrategia social	Restaurantes activos en redes reportaron +9.9% de ingresos directos B2C en 2024	Deloitte Digital — Social media strategies for restaurants