Key Findings

- Restaurants are far behind in search, appearing organically against an average of 1% of general delivery terms (i.e., “food near me delivery”) compared to couriers visible against an average of 37%.
- Restaurants, on average, only maintain 10% visibility against their own branded fulfillment and e-commerce terms like “brand delivery” and “order brand online,” and own 14% of text ads against those same queries, losing potential traffic to third parties.
- Google Maps is growing in prominence over Yelp, with 2.5x more ratings per location as Yelp and numerous opportunities for meaningful merchandising.

What Brands Should Be Thinking About

- **Lean Into Your Strengths:** Winning general delivery and daypart terms is difficult, but category specialists should invest in content and ads to appear against relevant product searches.
- **Promote Your Own Services:** Bid against your branded terms to make sure that your digital efforts in pickup, delivery and catering are not pushed out by third parties.
- **Focus on Google:** Google is the front page for customers and Google Maps is an increasingly valuable tool for restaurants to drive conversion.

Introduction

Though customers increasingly prioritize comfort and convenience, restaurants tend to not be the first display that customers see when searching for local food delivery online. Restaurants struggle to maintain visibility ahead of Yelp — the leading review aggregator site — and GrubHub, the largest courier. Across all unbranded search queries in food categories and fulfillment offerings (e.g., “grilled chicken wrap,” “burger delivery near me”), Yelp owns 7% of results and takes the first position against 16% of searches. In second place, GrubHub follows, as it owns almost 4% of all unbranded search results, taking the first position against 8% of searches. To fight back and improve visibility, restaurant leaders focus on key menu items like “pizza” and dayparts like “breakfast.” Brands must also maintain visibility against their own branded terms, as couriers increasingly take share and Google Maps grows in prominence as a discovery tool.

Restaurants US: Change in Search Volume for “near me” Terms

![Graph showing change in search volume for “food near me” and “restaurants near me” terms from 2015 to 2019](image)
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