

Out-Of-Home Dining in 2025: Performance & Consumer Trends

Dive into the data to find out how the dining category is performing in 2025, which segments are coming out on top, and how dining consumer behavior has shifted in recent years.



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Year-over-Year Dining Traffic Trends

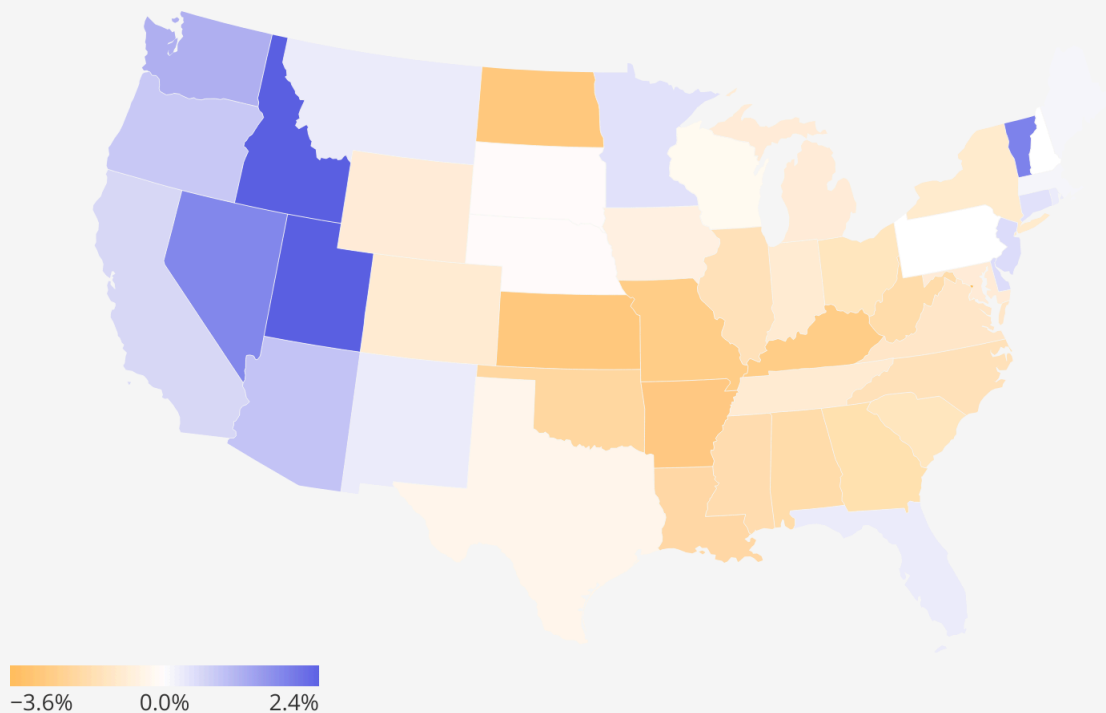
Dining Visits Mostly Up in the West, Down in Most of Midwest and East

Overall dining visits held relatively steady in the first five months of 2025, with year-over-year (YoY) visits to the category down 0.5% for January to May 2025 compared to the same period in 2024. Most of the country saw slight declines (less than 2.0%), though some states and districts experienced larger drops: Washington, D.C, saw the largest visit gap (-3.6% YoY), followed by Kansas and North Dakota (-2.9%), Arkansas (-2.8%), Missouri and Kentucky (-2.6%), Oklahoma (-2.1%), and Louisiana (-2.0%).

Still, there were several pockets of moderate dining strength, specifically in the west of the United States. January to May 2025 dining visits in Utah, Idaho, and Nevada increased 1.8% to 2.4% YoY, while the coastal states saw traffic rise 0.6% (California) to 1.2% (Washington). Vermont also saw a slight increase in dining visits (+1.9%).

The West Coast Outperforms the East Coast for Overall Dining Visits

Dining Visits by State, Jan - May '25 Compared to Jan - May '24



Coffee & Fine Dining See Strongest Overall Visit Growth

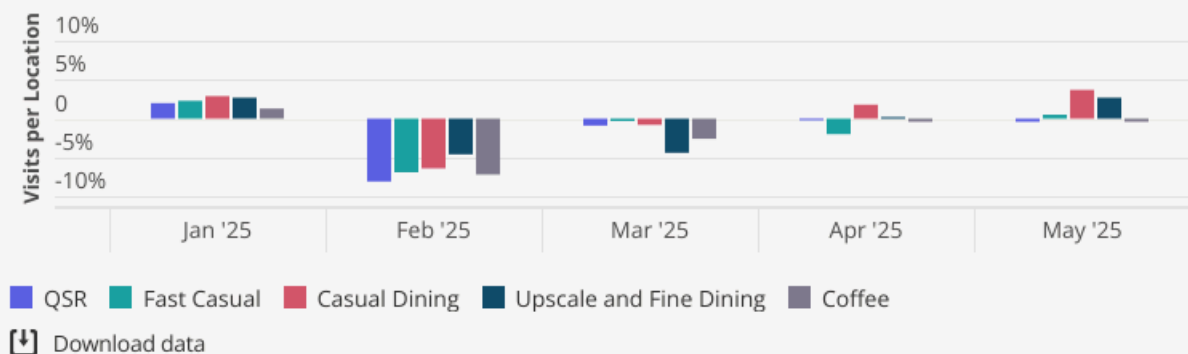
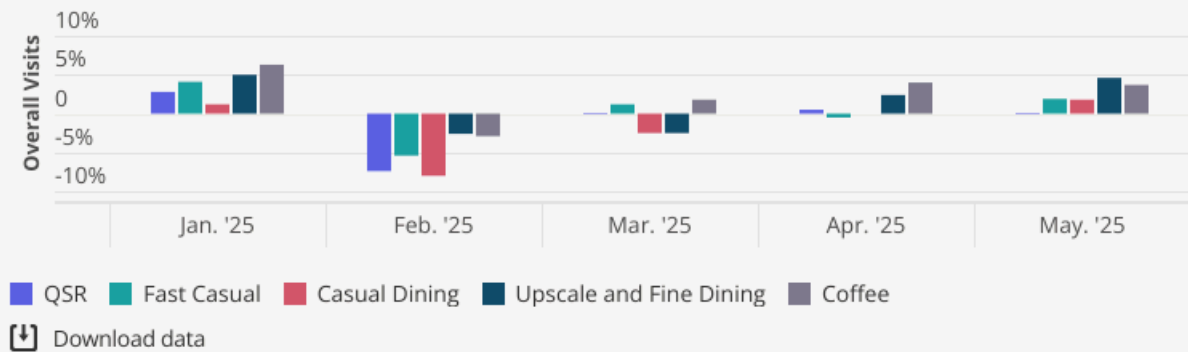
Diving into visit trends by dining segment shows that fine dining and coffee saw the strongest overall visit trends, with visits to the segments up 1.3% and 2.6% YoY, respectively, between January and May 2025. But visits per location trends were negative for both segments – a decline of 0.8% YoY for fine dining and 1.8% for coffee during the period – suggesting that much of the visit strength is due to expansions rather than more crowded restaurants and coffee shops.

In contrast, full-service casual dining saw overall visits decrease by 1.5%, while visits per location remained stable (+0.2%) YoY between January and May 2025. Several casual dining chains have rightsized in the past twelve months – including [Red Lobster](#), [TGI Fridays](#), and [Outback Steakhouse](#) – which impacted overall visit numbers. But the data seems to show that their rightsizing was effective, as the remaining locations successfully absorbed the traffic and maintained performance levels from the previous year. And the monthly data also provides much reason for optimism, with May traffic up both overall and on a visit per location basis – suggesting that the casual dining segment is well positioned for growth in the second half of 2025.

Meanwhile, QSR and fast casual chains saw similar minor visits per venue dips (-1.5% and -1.2%, respectively). At the same time, QSR also saw an overall visit dip (-0.8%) while traffic to fast casual chains increased slightly (+0.3%) – suggesting that the fast casual segment is expanding more aggressively than QSR. But the two segments decoupled somewhat in May, with overall traffic and visits per venue to fast casual chains up YoY while traffic remained flat and visits per venue fell slightly for QSR – perhaps due to the relatively greater affluence of fast casual's consumer base.

Visits to Dining Categories are Holding Steady for the Start of 2025

Overall Visits & Visits per Location by Dining Segment Compared to 2024



Dining Demographics

Visitor Income Levels Hold Steady in Most Segments

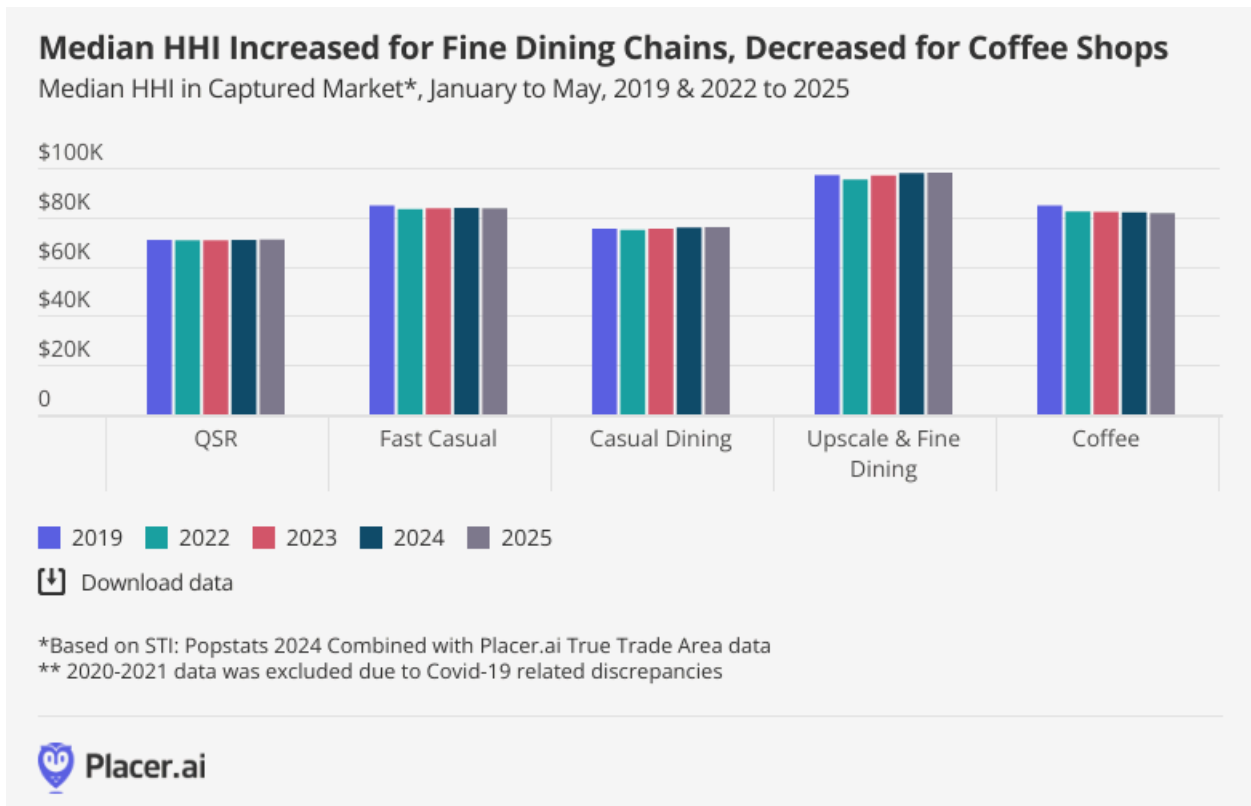
Analyzing the income levels of visitors to the various dining segments over time shows that each segment followed a slightly different trend – and the differences in visitor income may help explain some of the current traffic patterns.

The only three segments with YoY visit growth – casual dining, fine dining, and coffee – also had the highest captured market median household income (HHI). Although the median HHI in the captured market of upscale and fine dining chains fell after COVID, it has risen back steadily over time and now stands at \$98.0K – slightly higher than the \$97.1K median HHI between January to May 2019. This may explain the segment's resilience in the face of wider consumer headwinds. Meanwhile, the median HHI at fast casual and coffee chains has fallen slightly,

perhaps due to aggressive expansions in the space – including [Dave's Hot Chicken](#) and [Dutch Bros](#) – which likely broadened the reach of the segments, driving visits up and trade area median HHI down.

Like fine dining, casual dining also saw its trade area median HHI increase slightly over time – but the segment has still been facing visit dips. This could mean that, even though consumers trading down to casual dining may have boosted the trade area median HHI for the segment, it still might not have been enough to make up for the customers lost to tighter budgets.

The QSR segment saw its trade area median HHI remain remarkably steady – and visits to the segment have also been quite consistent – staying between \$70.6K and \$70.9K between 2019 and 2025 – which may explain why the segment's visits remained relatively stable YoY.



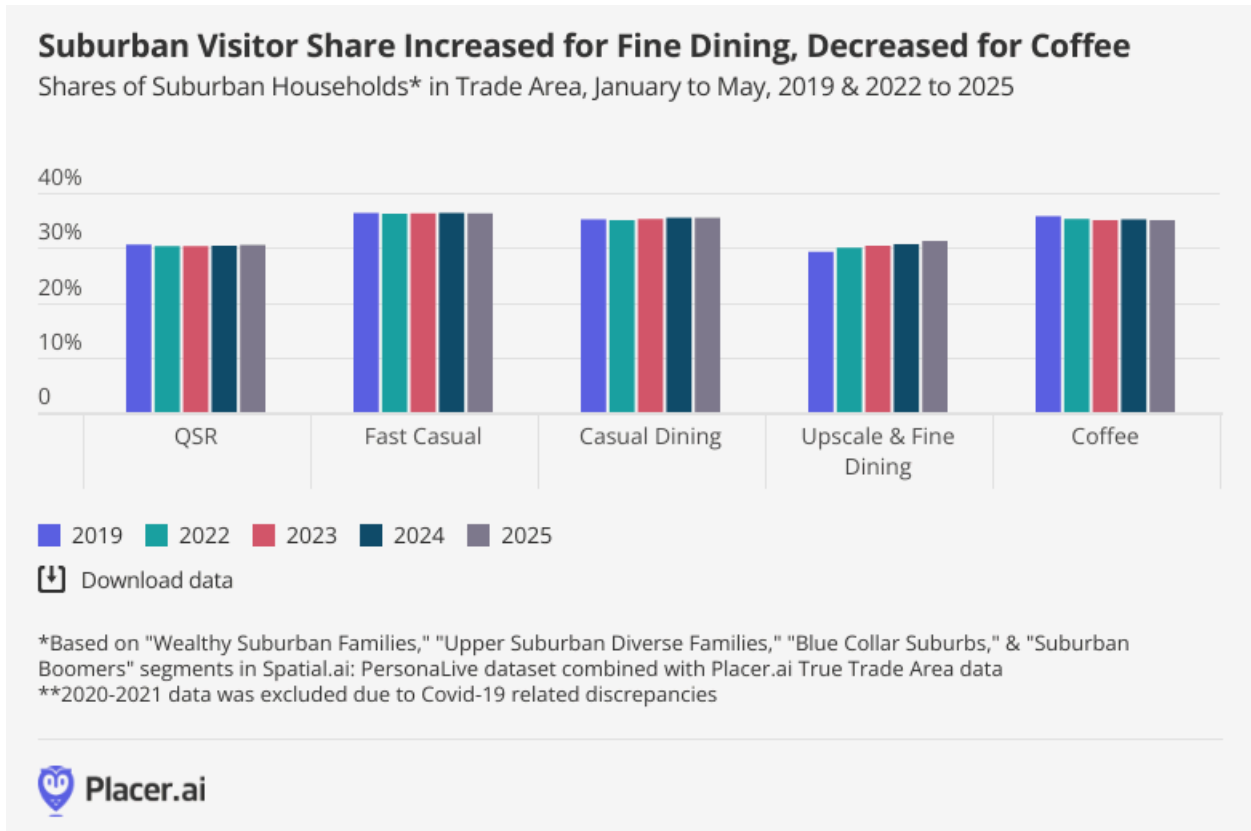
Suburban Dining Patterns

Diving into the psychographic segmentation shows that, although the fine dining segment attracted visitors from the highest-income areas between January and May 2025, fast casual chains drew the highest share of visitors from suburban areas, followed by casual dining and coffee. QSR attracted the smallest share of suburban visitors, with just 30.5% of the category's captured market between January and May 2025 belonging to [Spatial.ai: PersonaLive](#) suburban segments.

But looking at the data since 2019 reveals small but significant shares in the shares of suburban audiences in some categories' captured markets. And although the percentage changes are slight, these represent hundreds of thousands of diners every year.

The data shows that shares of suburban segments in the captured markets of fine dining chains have increased, while their share in the captured market of coffee chains has decreased. The shares of suburban visitors to QSR, fast casual, and casual chains have remained relatively steady.

This may suggest that the COVID-19 pandemic and the subsequent rise of remote and hybrid work models are still impacting consumer dining habits, benefiting destination-worthy experiences in suburban locales such as fine dining chains while reducing the necessity of daily coffee runs that were often tied to commuting and office work. Meanwhile, the stability in QSR, fast casual, and casual dining segments could indicate that these categories continue to meet consistent suburban demand for convenience and everyday dining, largely unaffected by the redistribution seen in the fine dining and coffee sectors.



Dining Consumer Behavior Trends

Although QSR, fast casual, casual dining, fine dining, and coffee all fall under the wider dining umbrella, the data shows distinct consumer behavior patterns regarding visits to these five categories.

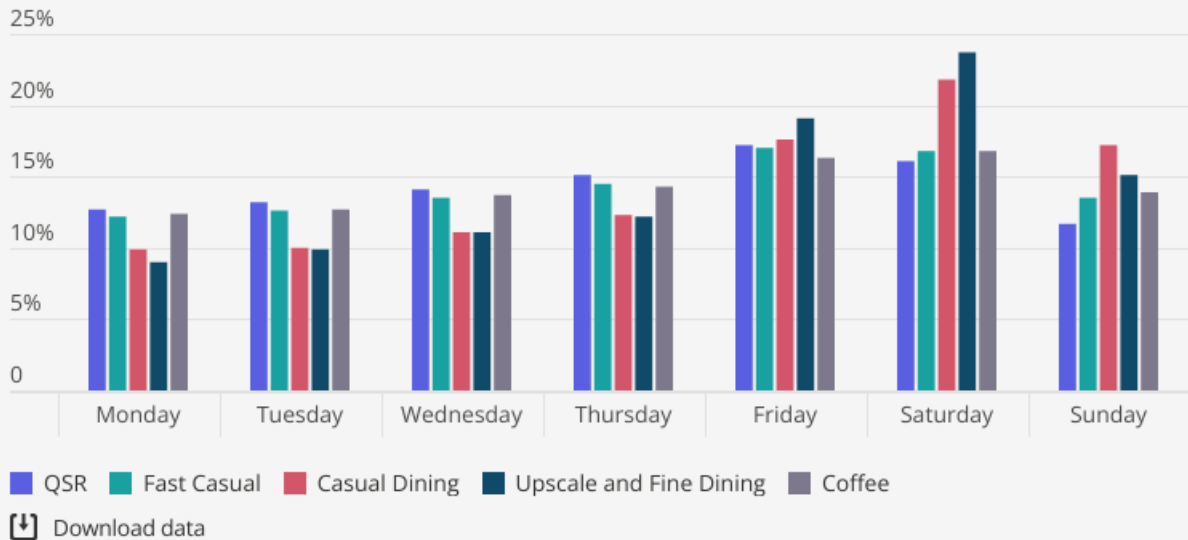
Limited Service Leads Weekday Visit Share, Full Service Rules the Weekend

Limited service segments, including QSR, fast casual, and coffee tend to see higher shares of visits on weekdays, while full service segments – casual dining and fine dining – receive higher shares of weekend visits. Diving deeper shows that QSR has the largest share of weekday visits, with 72.3% of traffic coming in between Monday and Friday, followed by fast casual (69.8% of visits on weekdays) and coffee (69.4% of visits on weekdays.) Looking at trends within the work week shows that QSR receives a slightly larger visit share between Monday and Thursday compared to the other limited service segments. Meanwhile, coffee seems to receive the smallest share of Friday visits – 16.3% compared to 17.0% for fast casual and 17.2% for QSR.

On the full-service side, casual dining and fine dining chains have relatively similar shares of weekend visits (39.0% and 38.8%, respectively), but fine dining also sees an uptick of visits on Fridays (with 19.1% of weekly visits) as consumers choose to start the weekend on a festive note.

Restaurant Visitation Varies with Limited Service Leading Weekdays and Full Service Leading Weekends

Share of Visits by Day of Week for Jan - May '25



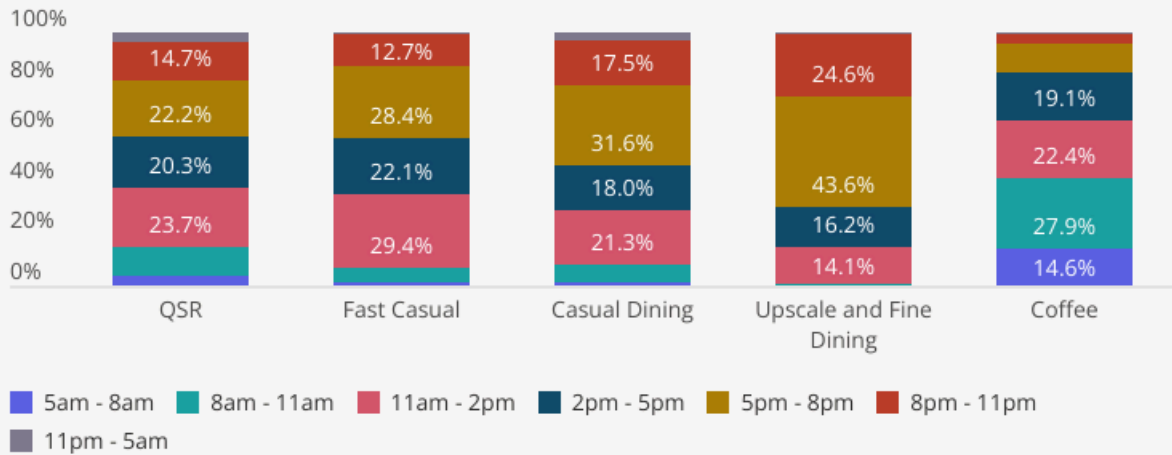
Each Segment Owns a Different Daypart

Hourly visit patterns also show variability between the segments. Coffee is the unsurprising leader of early visits, with 14.6% of visits taking place before 8 AM and, almost two-thirds (64.9%) of visits taking place before 2 PM. Fast casual leads the lunch rush (29.4% of visits between 11 AM and 2 PM), casual dining chains receive the largest share of afternoon (2 PM to 5 PM) visits, and fine dining chains receive the largest share of dinner visits, with almost 70% of visits taking place between 5 PM and 11 PM. QSR leads the late night visit share – 4.1% of visits take place between 11 PM and 5 AM – followed by casual dining chains (3.2% late night and overnight visit share), likely due to the popularity of 24-hour diners.

This suggests that each dining segment effectively "owns" a different part of the day, from the morning coffee ritual and the quick lunch break to the leisurely evening meal and late-night cravings.

Coffee Leads Morning Visits, QSR and Fast Casual Lead the Lunch Shift and Upscale Leads Evening and Late Night Dining

Share of Visits by Time of Day for Jan - May '25



Download data



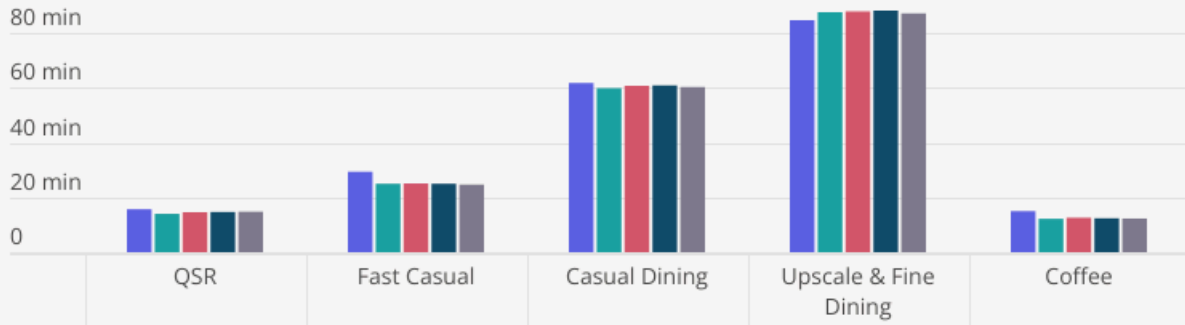
Shorter Visits in Most Segments

An analysis of average visit duration also reveals a small but lasting shift in post-pandemic dining behavior. Between January and May 2025, the average dwell time for nearly every dining segment was shorter than during the same period in 2019. This efficiency trend is evident across limited-service categories like QSR, fast casual, and coffee shops, suggesting a continued emphasis on speed and convenience.

The one notable exception to this trend is upscale and fine dining, where the average visit duration has actually increased compared to pre-COVID levels. This may suggest that, while visits to most segments have become more transactional, consumers are treating fine dining more as an extended, deliberate experience, reinforcing its position as a destination-worthy occasion.

Visits to All Dining Segments Except Fine Dining Shorter Than Pre-COVID

Average Visit Duration, January - May, 2019 & 2022 to 2025



■ 2019 ■ 2022 ■ 2023 ■ 2024 ■ 2025

Download data

*2020-2021 data was excluded due to Covid-19 related discrepancies



Key Takeaways

- Overall dining traffic is mostly flat, but growth is concentrated in specific areas.** While nationwide dining visits were nearly unchanged in early 2025, western states like Utah, Idaho, and Nevada showed moderate growth, while states in the Midwest and South, along with Washington D.C., saw declines.
- Fine dining and coffee chains are growing through expansion, not just busier locations.** These two segments were the only ones to see an increase in total visits, but their visits-per-location actually decreased, indicating that opening new stores is the primary driver of their growth.
- Higher-income diners are driving the growth in resilient categories.** The segments that saw visit growth—fine dining and coffee—also attracted customers with the highest median household incomes, suggesting that affluent consumers are still spending on dining despite economic headwinds.
- Remote work continues to reshape dining habits.** The share of suburban customers at fine dining establishments has increased since 2019, while it has decreased for coffee chains. This reflects a shift towards "destination" dining closer to home and away from commute-based coffee runs.

5. **Limited-service restaurants own the weekdays; full-service restaurants win the weekend.** QSR, fast casual, and coffee chains see the majority of their traffic from Monday to Friday, whereas casual and fine dining see a significant spike in visits on weekends.
6. **Each dining segment dominates a specific time of day.** Consumer visits are highly predictable by the hour: coffee leads in the early morning, fast casual peaks at lunch, casual dining takes the afternoon, fine dining owns the dinner slot, and QSR captures the late-night crowd.