

6 Coffee-Inspired Strategies That Can Reshape Dining in 2026

Dive into the data to see how coffee became one of this year's strongest dining performers – and explore strategies that can help restaurant concepts across segments succeed in 2026.



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Key Takeaways:

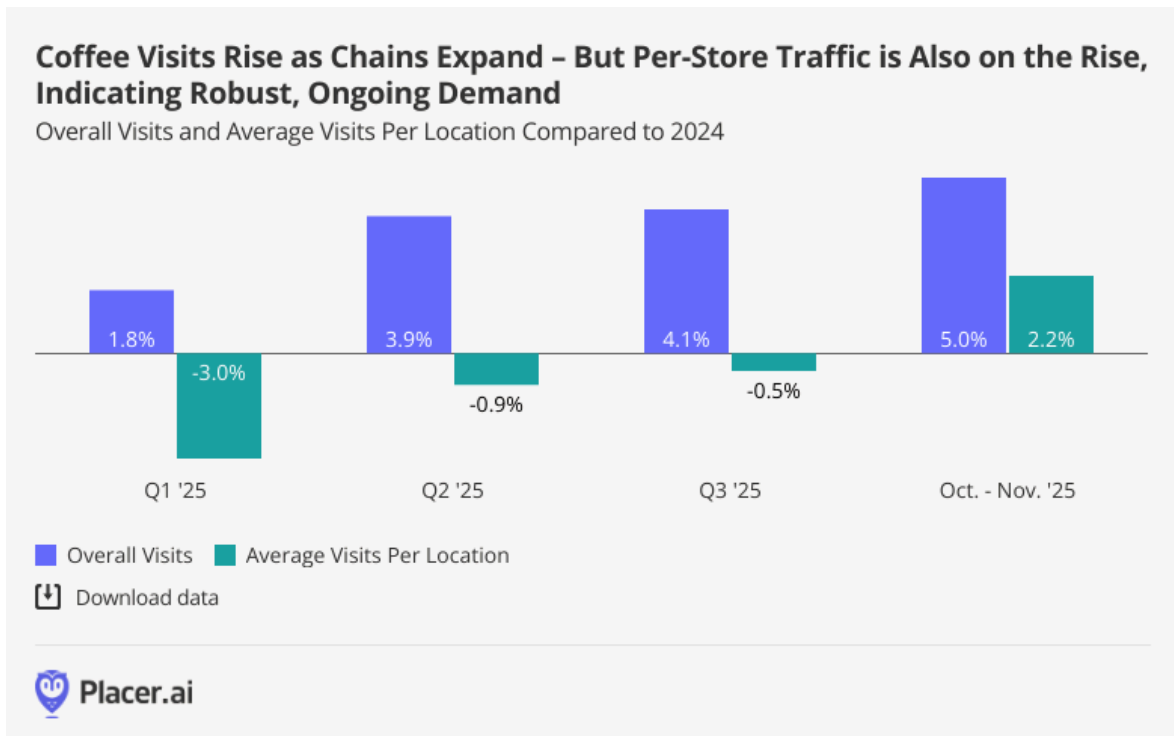
Coffee's success in 2025 offers several key lessons for dining operators across categories:

1. **Strategic expansion into under-penetrated regions can supercharge growth.** YoY visits to coffee chains are growing fastest in areas of the Southeast and Sunbelt where the category still accounts for a relatively low share of dining visits.
2. **Pairing craveable products with genuinely human, personalized service can build durable loyalty.** Aroma Joe's proves that when standout offerings are combined with warm, consistent personal touches, brands can create habit loops that drive repeat visits even in crowded markets.
3. **Prioritizing hyper-efficient convenience models can unlock meaningful growth.** Scooter's Coffee demonstrates that fast, reliable, frictionless experiences can materially increase traffic while supporting rapid expansion.
4. **Building recurring limited-time rituals can create predictable demand spikes and deepen engagement.** From the annual Pumpkin Spice Latte launch to Jackpot Day, coffee chains show that ritualized promotions can "own the calendar," generating predictable traffic spikes and deepening emotional engagement.
5. **Using scarce, hype-driven offerings can generate high-impact moments that shift behavior.** Starbucks' Bearista drop illustrates how limited, buzzworthy merchandise or products can not only spike visits but also shift customer behavior, driving traffic outside typical dayparts.
6. **Leveraging cultural collaborations can create excitement without relying on discounts.** Dunkin's Wicked partnership shows that tapping

into moments in pop culture can deliver multi-day visit lifts comparable to major promotions – often without relying on giveaways.

What Dining Chains Can Learn from Coffee's Success

Coffee has become one of the most resilient and inventive corners of the U.S. food and beverage industry. Even as consumers wrestle with higher prices and trim discretionary spending, they continue to show up for cold foam, caffeinated boosts, and treat-worthy daily indulgences.



Throughout 2025, coffee chains saw consistent year-over-year (YoY) quarterly visit growth, as brands from [Starbucks](#) to 7 Brew expanded their footprints. Crucially, per-location category-wide traffic also remained close to 2024 levels throughout most of the year before trending upward heading into the holiday

season – showing that this expansion has not diluted demand at existing coffee shop locations.

What's fueling coffee's ongoing momentum? Which strategies are helping leading chains accelerate despite this year's headwinds? And what can operators across dining categories learn from coffee's success?

This white paper dives into the data to reveal the strategies behind coffee's standout performance – and how they can help dining concepts across segments succeed in 2026.

1. Winning the Whitespace: A Growth Playbook for Dining Chains

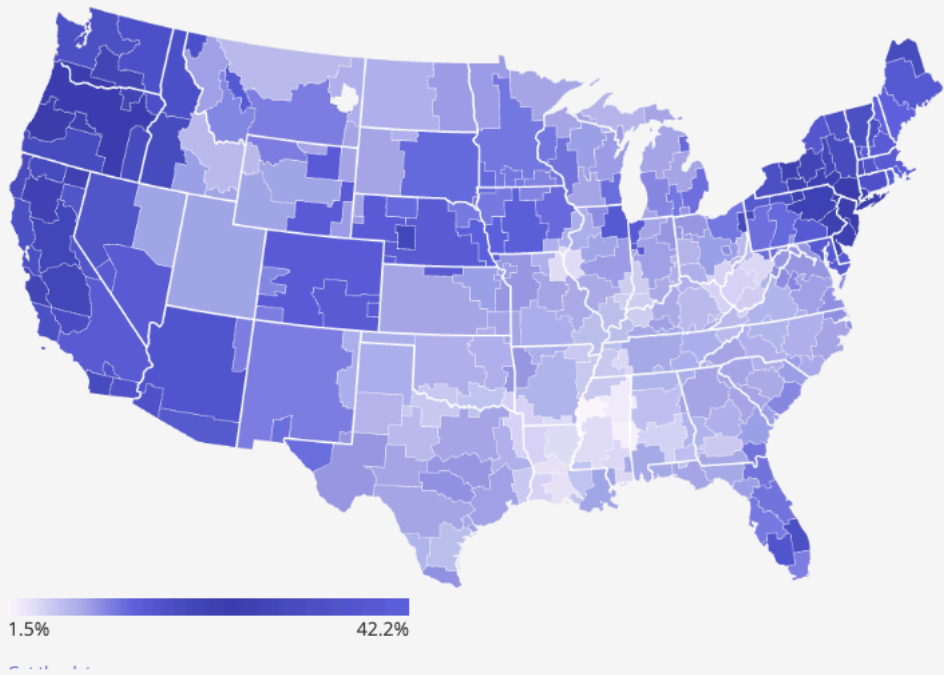
Analyzing market-level (DMA) dining traffic data reveals that coffee chains are prioritizing growth in markets with lighter competition – and this formula is paying off.

In the graphic below, the top map shows the share of dining visits commanded by coffee in each DMA, while the bottom map highlights the year-over-year (YoY) change in visits to the coffee category. Perhaps unsurprisingly, markets where coffee already commands a high share of dining visits (specifically on the West Coast and in the Northeast) are seeing the softest year-over-year performance, while DMAs with lower coffee penetration are delivering the strongest visit growth.

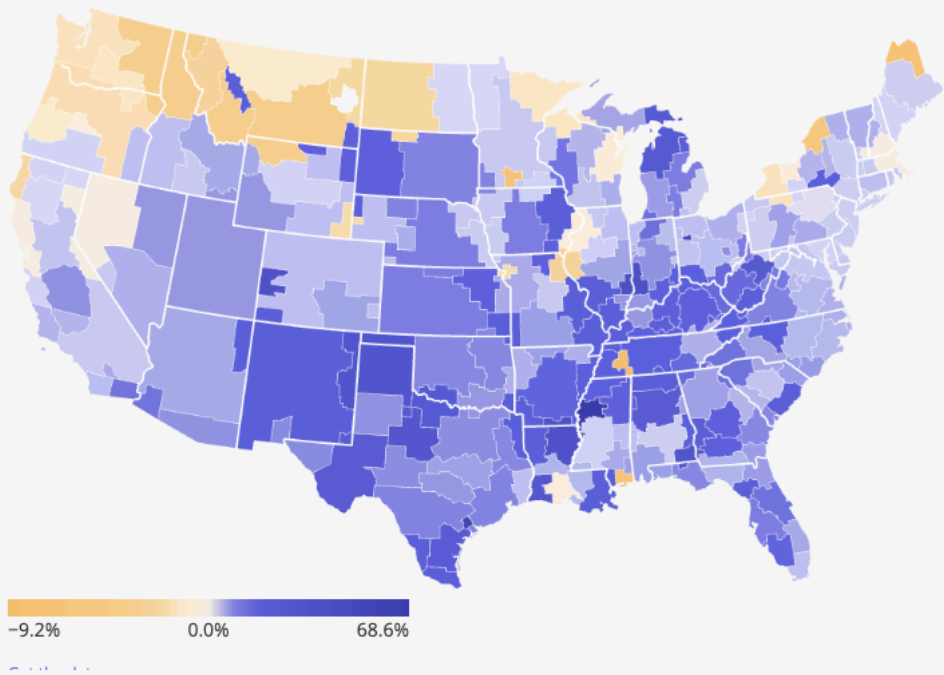
In other words, traditional coffee markets such as Northwestern metros – where competition is high and incremental gains are harder to capture – are no longer the primary engines of category momentum. Instead, coffee visits are growing fastest across the Southeast, Sun Belt, and Texas – regions where branded coffee still represents a relatively small share of dining visits. Operators across dining segments can learn from coffee's approach and identify markets with low category penetration to lean into those whitespace opportunities.

Coffee Visits Grow in Underdeveloped Markets, as Chains Tap Significant Whitespace – Especially Beyond the Northeast and West Coast

Share of Overall Dining Visits Captured by Coffee Chains by DMA (Jun - Nov. '25)



Year-Over-Year Visits to Coffee Chains by DMA, (Jun. - Nov. '25 Compared to Jun. - Nov. '24)



2. Mastering the Fundamentals: Aroma Joe's

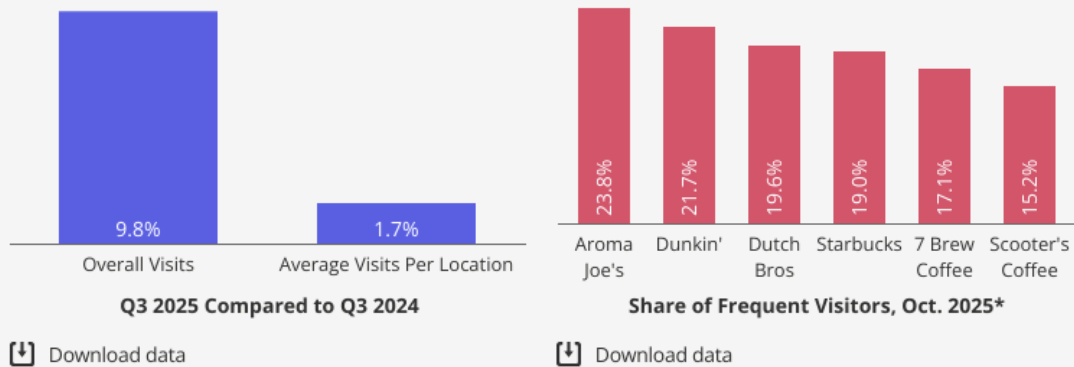
But geography is only part of the story. And the coffee segment shows that a strong concept that delivers on fundamentals – great products and exceptional service – can thrive even in tougher coffee markets such as the northeast.

The experience of expanding Northeastern chain Aroma Joe's shows how pairing craveable beverages with an unusually personal service model can drive visit growth even in relatively hard-to-break-into regions.

Aroma Joe's, a rapidly-expanding coffee chain headquartered in Maine, with over 125 locations, has become something of a local obsession: Customers [rave](#) about the chain's addictive signature beverages – as well as the feel-good atmosphere cultivated by its warm, friendly staff. And this combination of human touch and product quality creates a powerful habit loop: In October 2025, nearly one quarter of visitors to Aroma Joe's stopped at the chain at least four times during the month – a much higher loyalty rate than that seen by other leading coffee brands.

The takeaway: Craveable products paired with exceptional service can create a scalable loyalty engine.

Aroma Joe's Addicting Combination of Quality Drinks and Friendly Service Drives Customer Loyalty



*Share of visitors frequenting the chain at least four times during the month.



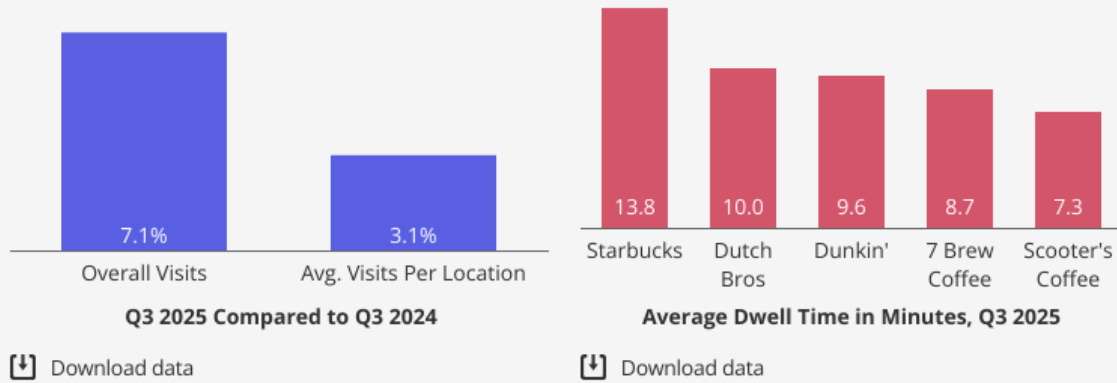
3. Delivering on Convenience: Scooter's Coffee

Another key differentiator for the coffee sector is convenience. Drive-thrus have become [ubiquitous](#) across the category, with many of the fastest-growing upstarts embracing drive-thru only models and legacy leaders also leaning more heavily into the format.

Scooter's Coffee – named for its core [promise](#) to help customers “scoot” in and out quickly – exemplifies this advantage. In Q3 2025, the chain posted a 3.1% YoY increase in average visits per location, even as it continued to scale its footprint. And its customers averaged a dwell time of just 7.3 minutes – significantly lower than other leading coffee chains, including other drive-thru-forward peers.

By delivering consistently quick experiences without compromising quality, Scooter's has emerged as a traffic leader in the coffee space – demonstrating the power of efficiency to drive demand.

Scooter's Coffee is Winning by Executing on its Core Convenience-Focused Mission



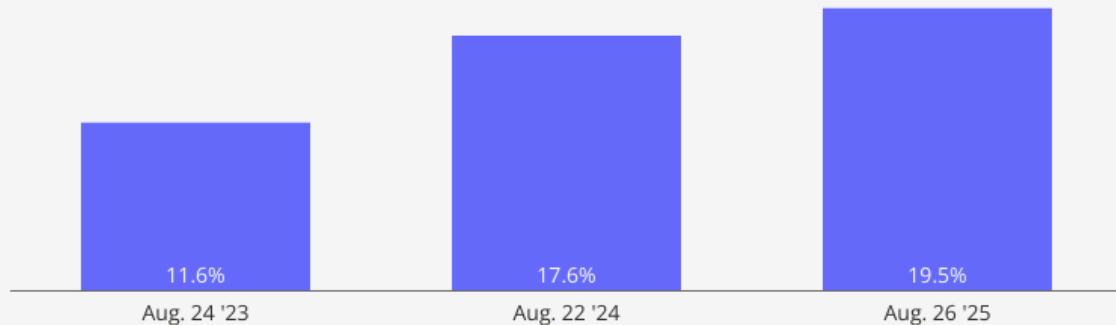
4. Owning the Calendar With Recurring LTOs: Starbucks and 7 Brew


No category has mastered the “event-ization” of the menu quite like coffee – and few brands own the category’s calendar as effectively as Starbucks. The annual return of the Pumpkin Spice Latte has become a cultural milestone that marks the unofficial start of fall for millions, driving double-digit visit spikes and shaping seasonal traffic patterns.

And the importance of the event only continues to grow. On August 26th, 2025, PSL day drove a 19.5% spike in traffic compared to the prior ten-week average – a higher relative spike than that seen in 2024 or 2023.

Annual Pumpkin Spice Latte Visit Surge Grows in Importance for Starbucks

Visits to Starbucks on PSL Launch Day, Compared to Prior 10-Week Daily Average



 Download data



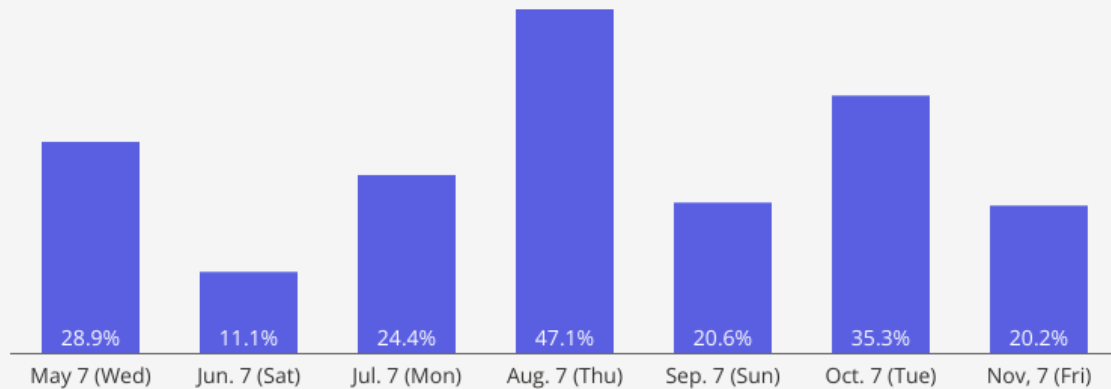
But this playbook isn't reserved for mega-brands. 7 Brew's monthly Jackpot Day, held on the 7th of each month, shows how recurring promotions can also build anticipation and deliver repeatable traffic lifts for up-and-coming concepts.

Beginning in August 2025, Jackpot Day shifted from a limited "Jackpot Hour" to an all-day activation. That month's offer – two medium drinks for \$8 plus a Kindness wristband – generated a 47.1% lift versus an average Thursday. And in subsequent months, giveaways [ranging](#) from tote bags to footballs kept the excitement going, sustaining elevated visits each time the 7th rolled around.

These rituals create emotional consistency: Customers know when to expect something special and plan around it. Dining chains beyond the coffee space can also create dependable spikes in traffic by implementing recurring, ritualized LTOs that create an emotional calendar and keep customers engaged.

7 Brew's "Jackpot Day" Drives Reliable Traffic Spikes to the Chain

Visits to 7 Brew Coffee Compared to Same-Day Average For Prior Ten Weeks | 2025



Download data

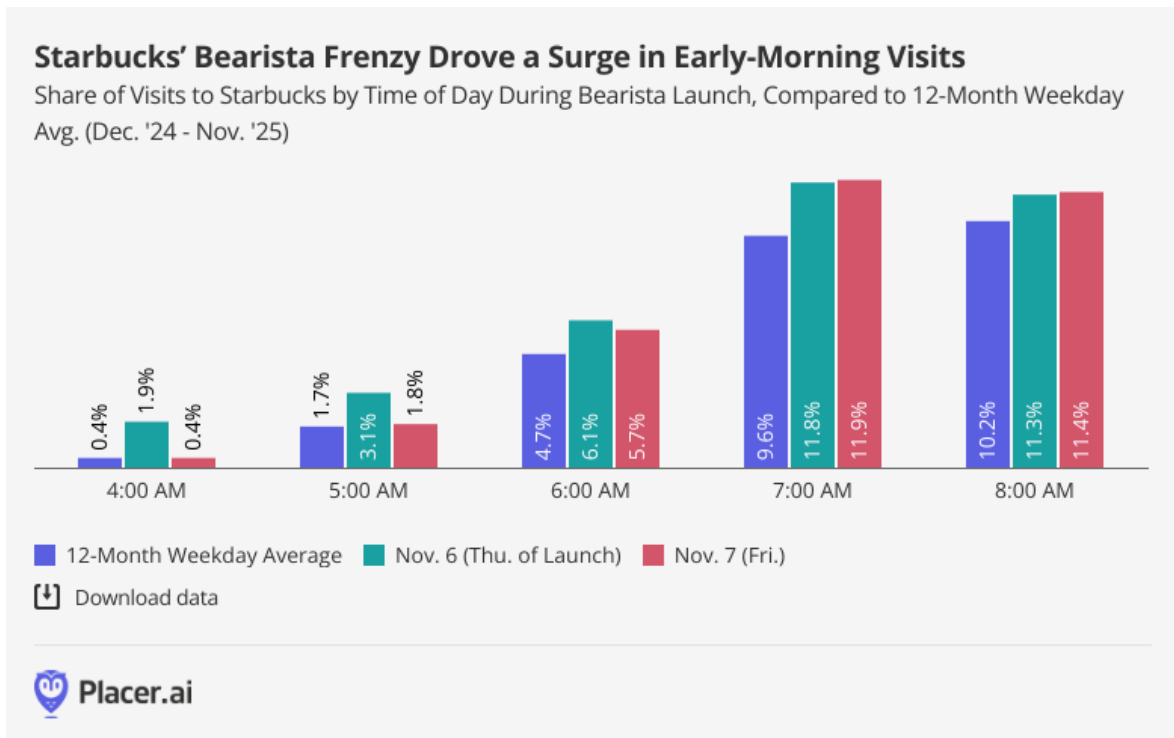


5. Moving Beyond Food & Drink: Starbucks' Bearista Win

Offering recurring LTOs is one way to keep customers consistently engaged. But one-time, limited-edition merch drops can create even bigger visit surges. Starbucks' much-hyped "Bearista" launch this November is a prime example: Customers lined up nationwide for the chance to buy – not receive – an adorable, limited-edition, bear-shaped reusable cup. And despite its hefty \$30 price tag, the merch drop drove a massive nationwide [visit spike](#), making it the chain's biggest sales day ever and fueling additional momentum leading into [Red Cup Day](#).

And location data shows that this kind of hype-driven, scarce merchandise can shift not just visitor volume but daypart behavior. Visits surged as [early](#) as 4:00 AM as FOMO-driven customers showed up at the crack of dawn to secure a bear. And the shift toward early morning visits (though not quite as early) continued the following day as stores [quickly](#) ran out of stock.

Starbucks' Bearista frenzy suggests that scarcity isn't just a retail tactic – it's a powerful behavioral trigger that restaurants can harness as well. Limited-run items, exclusive merch drops, or time-bound specials can generate excitement, pull visits forward, and reshape daypart patterns in ways traditional promotions rarely do.

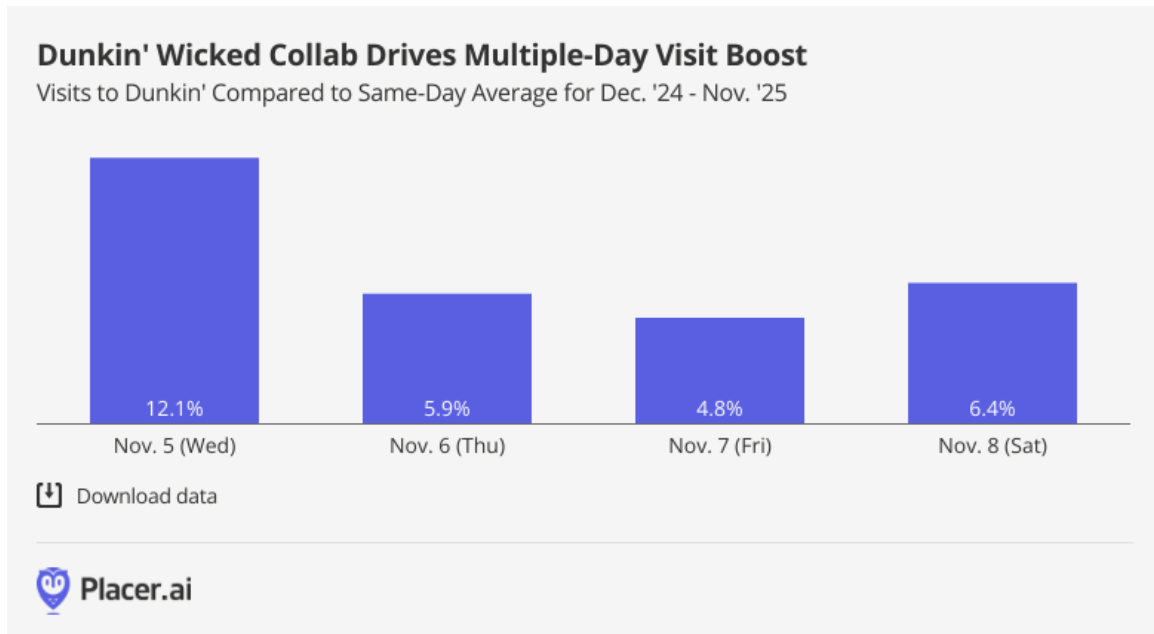


6. When Pop Culture Meets Coffee: Dunkin's Wicked Collab

Cultural tie-ins add another accelerant. In November, Dunkin' launched its Wicked collaboration alongside its holiday menu, generating a significant multi-day traffic spike – achieved, like Bearista, without giveaways. The event leaned on playful thematic branding, seasonal flavors, and limited-run items that tapped into Wicked fandom.

Dunkin's Wicked surge shows that when executed well, cultural relevance can also significantly move the needle. Other dining segments may also lean into

thoughtful collabs to create outsized excitement and traffic lift – even without deep discounts or free offers.



Coffee As A Playbook

The coffee sector's 2025 performance offers a blueprint for dining success: Chains are expanding smartly into underpenetrated regions, successfully implementing both hyper-efficient and hyper-personal service models, using recurring LTOs to build seasonal and monthly rituals, and leveraging merch and pop culture partnerships to reshape demand.

Together, these strategies provide a practical playbook for dining brands to increase visit frequency, deepen customer commitment, and capture new growth opportunities in 2026 and beyond.