

What's *Really* Happening in Restaurant Spending



There's a version of restaurant spending that makes intuitive sense: people eat out when they're hungry, order what they're craving, and skip the drive-thru when the fridge is stocked.

But the receipts have other ideas. From surprising coffee orders to nostalgia that isn't filling seats, the story is messier than expected — and far more interesting.

Here's what's *really* happening in restaurant spending.

1. Nostalgia is trending, but dining is moving on

Throwback menus, retro branding, and “remember this?” energy are showing up everywhere. But where people spend is shifting in the opposite direction.



Modern Brands

LAUNCHED IN OR AFTER 2000

+3.4%



Nostalgic Brands

LAUNCHED IN OR BEFORE 1999

-1.7%

YoY % change, trips

Diners say “take me back,” then try something new.

Restaurant spend is **shifting toward newer brands** while nostalgic chains are losing ground. People like to revisit the past — just not at the register.

#2. Healthy groceries and fast food aren't mutually exclusive

Yogurt, fresh fruit, and vegetables show up in many monthly grocery routines. That same routine also usually includes regular fast food orders.

Users who purchased
fresh fruit
every month



Users who purchased
fresh vegetables
every month



Users who purchased
yogurt
every month



The produce drawer and the drive-thru have learned to co-exist.

Around **one-third of people** buying “healthy” staples also order fast food every month. Both fresh fruit and the combo meal are keeping standing appointments.

#3. Big groups need a big occasion to book a table

Group dining feels spontaneous — it starts with a loose plan and a few people saying “I’m in.” In reality, it takes a holiday to turn that plan into an actual order.



Fast Food
top days by
receipt volume



Fast Casual
top days by
receipt volume



Full-service
top days by
receipt volume



Top dates for restaurant receipts containing 2.5x average check size, indicating >2 people dining together, 2025

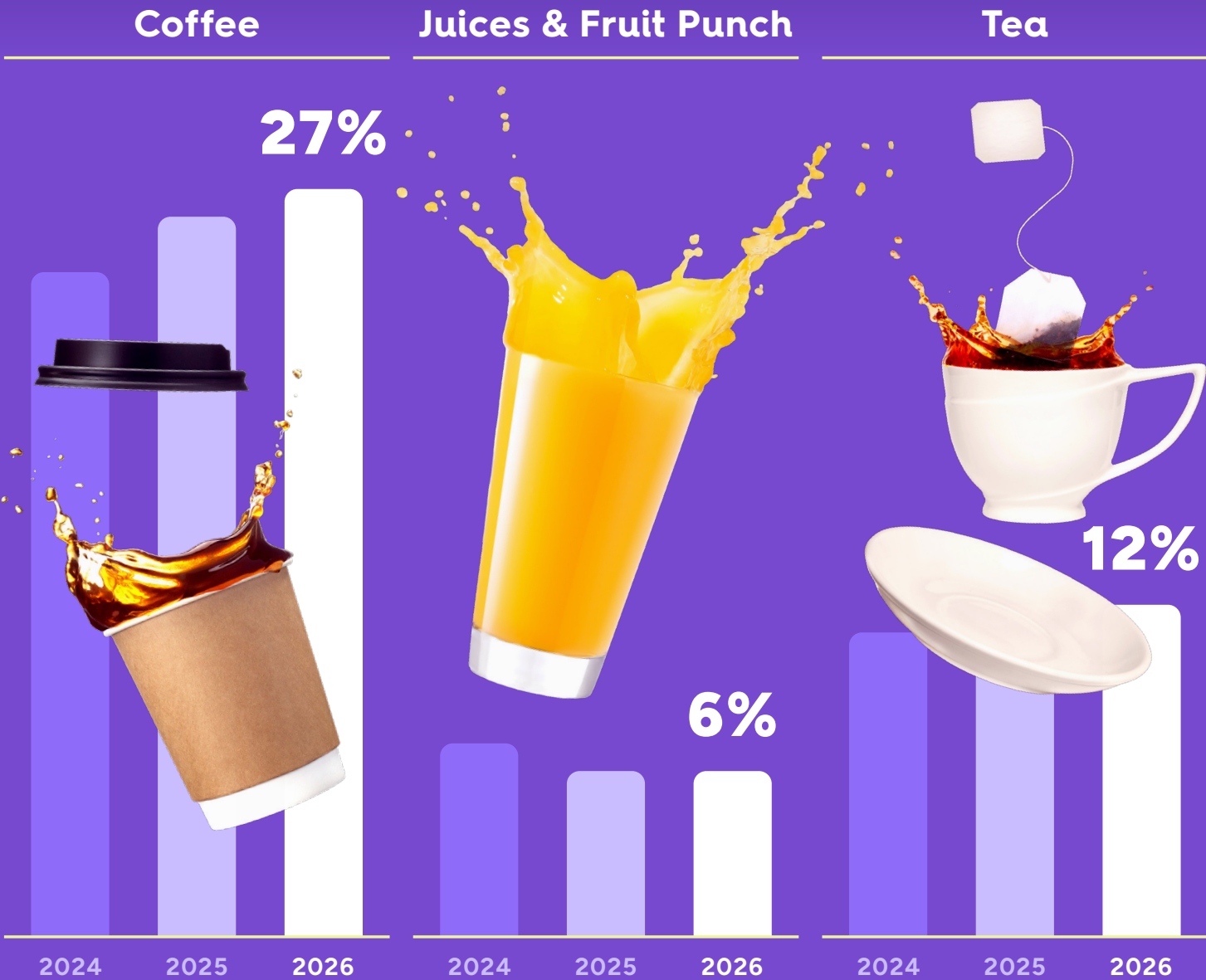
Special occasions are happening with laminated menus in hand.

Group dining clusters around major holiday moments. People are still celebrating — they’re just placing an order before figuring out the seating arrangement.

#4. As the “Refresher Wars” escalate, coffee keeps winning the order

These days, menus are packed with matcha variations, fruity drinks, and refreshers in every color. But most orders still include a coffee.

SHARE OF RESTAURANT RECEIPTS, BY YEAR



Coffee continues to outrank the new recruits.

Coffee and espresso drinks still make up **the largest and fastest-growing share** of orders. The menu keeps growing, but coffee still wins at the register.



About Fetch Finds

Fetch Finds is a consumer insights series from Fetch. Users snap 13M+ receipts every day, contributing to visibility into \$212B GMV. These receipts power our insights, which are rooted in real transactions — not projections or approximations. This report focuses on restaurant spending across multiple verticals, including QSR, fast casual, casual dining, midscale, and more.

Are you a restaurant that wants to be on Fetch? Visit campaigns.fetch.com to get started.