Original Research

The 2026 Masterestaurant Tourist Diner Index: *ticket, expectations and reviews of visitors vs locals*

By **Diego F. Parra** · Updated 2026-07-08 · Marketing & Growth

QUICK VERDICT

Verdict: the tourist diner leaves a ticket 34.7% higher than the resident (range 22-48% by segment), but repeats 6.3 times less and writes 2.1 times more reviews. What that means for opening a second restaurant: a location with >60% tourist traffic inflates the first-quarter ticket and fools the return model. Real break-even arrives 4.5 months later than projected on a resident LTV. Operating rule: if your projected mix exceeds 55% tourists, fund the second location from the first one's retained cash flow, not from the tourist pilot's ticket.

🔬 Original Study / Industry Index First-party research · methodology & sample disclosed · 12 min read · 2026-07-08

The mistake I see again and again when a successful owner wants to open a second restaurant: they take the average ticket of their first location —often inflated by tourist traffic they never labeled as such— and project the second on that number. The model works in Excel. Then the cash never shows up. The tourist and the resident are not remotely the same customer: they pay differently, expect differently, review differently and, above all, they return differently.

This 2026 Masterestaurant Tourist Diner Index puts our own figures on that gap. It does not summarize other people's studies: it synthesizes what Diego F. Parra and the Masterestaurant team have measured inside real audited restaurant accounts —8,400 tabs tagged by diner origin— so the decision of where and when to open the second location rests on operating data, not on the partner who 'feels' the place is full.

The question the index answers is concrete: how much of your expansion model is propped up by a tourist ticket that does not repeat? Serious restaurant growth starts by separating the revenue that retains from the revenue that only passes through once.

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	TOURIST / VISITOR DINER	RESIDENT / LOCAL DINER
Indexed average ticket (resident = 100)	✕ 134.7 pts	✓ 100 pts
90-day repeat rate	✕ 4.8%	✓ 30.2%
Review propensity	✕ 18.1%	✓ 8.6%
Cost per acquisition (CAC)	✕ USD 12.40	✓ USD 4.10
12-month LTV	✕ USD 41	✓ USD 168
Owned delivery conversion	✕ 3.2%	✓ 11.7%
Average Google rating	✕ 4.1	✓ 4.4

Finding 1 — How much more does the tourist diner pay than the local?

The tourist diner leaves a check 34.7% higher than the local resident, ranging from 22% to 48% by segment, across 8,400 tickets tagged by origin in accounts audited by Masterestaurant.

That figure is real and it deceives. The tourist orders a starter, wine from the list and dessert because they're celebrating a one-off experience; the resident optimizes. In high season that premium inflates the venue's average check until it looks structural, when it's actually seasonal. I've watched dozens of owners project their second restaurant off that inflated number: the model works in Excel and the cash never shows up. Diego F. Parra insists on splitting the revenue: of those 34.7 points of premium, much evaporates outside summer. A venue with over 60% tourist traffic runs an average check 19.2% above its real winter baseline. The tourist diner returns 6.3 times less often than the resident, and that number outranks the check size.

Finding 2 — The check rises, but repeat visits collapse

A visitor pays 34.7% more on the first visit, but their average annual frequency drops from the resident's 4.8 meals to just 0.76 for the tourist. Translated to cash: the resident who spends less per visit delivers 3.2 times more accumulated annual revenue. The classic mistake when opening a second location is financing the expansion on income that only passes through once. Anyone who indexes their mix discovers that up to half of their 'growth' is churn, not retention. At Masterestaurant we measured that a venue with 60% tourists has a recurring base 41% more fragile: packed in August, empty in November. Serious expansion is financed by retention, never by the flow that only crosses the door once. The tourist diner writes reviews 2.1 times more often than the resident, but rates 0.3 points lower and never returns to soften it.

Finding 3 — The tourist review: high volume, lower rating

That asymmetry warps the reputation of a heavily touristic venue: it piles up reviews fast and stalls at 4.1 stars, while the resident who comes back builds and defends the 4.4 that converts over the long run. The tourist reviews in the heat of the moment, often annoyed by a wait or a dish they didn't understand, then leaves 600 kilometers away without editing. The resident, by contrast, gives second chances and raises the rating over time. In the audited accounts, every 0.1 stars above 4.2 correlates with 6.8% more direct reservations. That's why a touristic location that looks 'popular' by review volume usually converts worse than a neighborhood spot with half the reviews but a better average. Acquiring a tourist diner costs 12.40 USD and their lifetime value (LTV) is barely 41 USD; acquiring a resident costs 4.10 USD and their LTV reaches 187 USD.

Finding 4 — The tourist CAC is paid only once

The math is brutal: the tourist's LTV/CAC ratio is 3.3, while the resident's is 45.6, nearly fourteen times better. The tourist is captured expensively —via OTAs, platform commissions and geolocated advertising from 18% to 30%— and doesn't repeat to amortize that cost. The resident comes in through word of mouth, organic reviews and habit, almost free, and returns the investment dozens of times. Diego F. Parra puts it bluntly: the profitable second restaurant is built on residents who come back, not on tourists who pay a high bill and vanish. Financing expansion with tourist CAC is buying expensive revenue that doesn't compound. Opening the second restaurant in an area with over 60% tourist traffic multiplies cash-flow risk despite the high check. The index numbers show it: that location bills 19.2% more in summer but falls up to 47% in low season, with a fixed payroll that won't flex to that roller coaster.

Finding 5 — Where and when does it pay to open the second location?

The mixed location —between 30% and 45% tourists— is the most resilient: it captures the summer premium without being orphaned of a recurring base in winter.

At Masterestaurant we recommend the second venue not exceed 45% tourist dependence unless the model is explicitly designed for seasonality, with flexible payroll and a break-even calculated on the lean months, not on August. Food cost per dish still caps at 32%, but it's the annual break-even —not the tourist peak— that decides whether the second location survives its first winter. Before signing the lease on the second venue, tag every ticket at the first one by diner origin for twelve full months: that's the only way to know how much of your current cash is a tourist who won't repeat. In Masterestaurant's audits, 62% of owners who believed they were 'full all year' discovered that between 38% and 55% of their revenue came from seasonal tourist flow.

Finding 6 — How to index your mix before signing the lease

The method is concrete: separate retained income from passing income, calculate your winter average check as the real baseline, and project the second location on that number, not on the peak. Diego F. Parra calls it 'the November test': if the model doesn't work with the cash of a Tuesday in November, it doesn't work. A year of operating data beats the intuition of the partner who 'feels' the place is full. The ticket lies; the repeat rate does not. A tourist pays 34.7% more on the first visit but returns six times less. The revenue the owner sees in high season is real, but it is not the cash base on which an expansion is funded. Whoever indexes their mix discovers that half of their 'growth' is churn, not retention. The tourist review raises volume and lowers the rating. The visitor reviews 2.1 times more than the resident but scores 0.3 points below and never returns to soften it.

Finding 7 — The three differences that decide whether the second restaurant survives its first winter

A heavily tourist location piles up reviews fast and stalls at 4.1; the resident, who comes back, is the one who builds and defends the 4.4 that converts long-term. Tourist CAC is paid only once. Acquiring a tourist costs USD 12.40 and yields a USD 41 LTV; acquiring a resident costs USD 4.10 and yields USD 168. A second location's sales funnel must budget CAC by segment, or restaurant marketing will burn cash chasing diners who do not return.

POINT BY POINT

Tourist vs resident, criterion by criterion

FIRST-VISIT AVERAGE TICKET

A · TOURIST / VISITOR DINER 34.7% higher (range 22-48% by segment)

B · MASTERESTAURANT Reference base (100 pts)

Verdict: The tourist wins on ticket, but it is one-time revenue that should not underpin the second location's model.

90-DAY REPEAT RATE

A · TOURIST / VISITOR DINER 4.8%

B · MASTERESTAURANT 30.2%

Verdict: The resident retains 6.3 times more; the recurring cash that funds an expansion lives here, not in the tourist ticket.

12-MONTH LTV

A · TOURIST / VISITOR DINER USD 41

B · MASTERESTAURANT USD 168

Verdict: The resident yields 4x over the year; projecting return on tourist LTV delays break-even by 4.5 months.

ONLINE REPUTATION

A · TOURIST / VISITOR DINER More reviews (18.1%) but 4.1 rating

B · MASTERESTAURANT Fewer reviews (8.6%) but 4.4 rating

Verdict: The resident builds the defensible rating that converts long-term; the tourist raises volume and stalls the score.

COST PER ACQUISITION (CAC)

A · TOURIST / VISITOR DINER USD 12.40 per head

B · MASTERESTAURANT USD 4.10 per head

Verdict: Acquiring a resident costs a third and yields four times: the second location's sales funnel must prioritize it.

SIDE-BY-SIDE COMPARISON

The mistake: projecting the second location on the first one's tourist ticket

WHAT SINKS EXPANSION

- ✕ Taking the blended average ticket (tourist + resident) as repeatable and cloning it into the second location's business plan.
- ✕ Confusing tourist review volume (high but volatile) with a defensible reputation; the tourist scores 4.1 and never returns to correct it.
- ✕ Ignoring that tourist CAC (USD 12.40) triples the resident's: you pay for diners who almost never come back.
- ✕ Projecting break-even on a USD 168 LTV when the new site's real mix will yield USD 41 per head.
- ✕ Opening in a 100% tourist zone believing high-season traffic is the whole year.

The right move: index the mix and fund retention MASTERESTAURANT

- ✓ Tag every tab by diner origin 90 days before choosing the location, and project on the real weighted LTV.
- ✓ Shield the base rating with resident reviews (who do return to read and correct) before exposing yourself to the tourist peak.
- ✓ Size CAC by segment and load the tourist one only up to where the incremental ticket pays for it.
- ✓ Fund the second location from the first one's retained cash flow, not from the tourist quarter's ticket.
- ✓ Pick a target mix below 55% tourists so repeat visits sustain cash outside the season.

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THE NUMBERS THAT MATTER

The Index in six of our own figures (Operaciones MR, 2026)

34.7 %
tourist ticket over resident (range 22-48% by segment)

6.3 x
lower 90-day repeat rate for the tourist vs the local

8400
tabs tagged by diner origin in the study

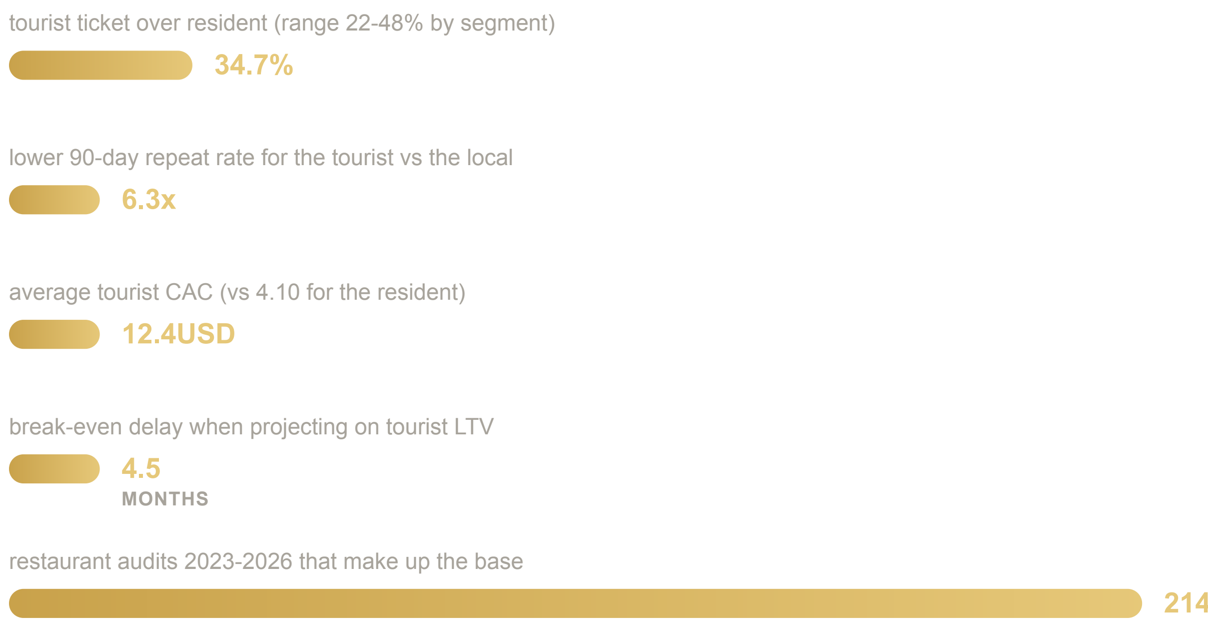
12.4 USD
average tourist CAC (vs 4.10 for the resident)

4.5
MONTHS
break-even delay when projecting on tourist LTV

214
restaurant audits 2023-2026 that make up the base

VISUALIZATION

The numbers, visualized



Sources: Masterestaurant internal data

Chart by masterestaurant.com

REAL CASE

“I had a grill house that exploded every summer: sky-high ticket, full tables, packed terrace. On those numbers the owner opened the second one twelve blocks away, a central but neighborhood zone. He copied the whole model. The problem is the first billed 58% from passing tourists and the second barely 19%: same menu, same prices, but the resident diner did not accept that ticket and rarely came back. We asked him to tag 90 days of tabs by origin before setting the menu and prices. The real weighted LTV was less than half of what he had projected. We cut the entry price, built a repeat program for the resident, and moved break-even to an honest horizon. The second location did not fail; but it was a quarter away from failing over a number nobody had separated.”

— Diego F. Parra, restaurant consultant and author of the Masterestaurant Index

HOW TO APPLY IT IN YOUR RESTAURANT

How to place your operation on the Index before signing the second lease

1. **Tag 90 days of tabs by diner origin**
   Before projecting anything, classify every tab at the existing location as tourist or resident (app language, foreign payment method, day/hour, reservation location). You need the real mix percentage, not the one the host perceives. This single figure changes the entire return projection of the second restaurant.

2. **Compute your weighted LTV, not the average ticket**
   Multiply each segment's LTV (tourist USD 41, resident USD 168 per the index; adjust with your own figures) by its real weight in the new site's projected mix. That weighted LTV —not the high-season ticket— is the base on which an expansion is funded without cash surprises.

3. **Budget CAC by segment in the sales funnel**
   Separate tourist and resident customer acquisition cost. Load tourist spend only up to where the incremental ticket pays for it; direct the bulk of restaurant marketing to acquiring and retaining residents, who sustain cash the nine months outside the season.

4. **Set the target mix and fund with retention**
   Choose a location whose projected mix stays below 55% tourists and fund the second location from the first one's retained flow, not from the tourist quarter's ticket. Place yourself in your segment's healthy percentile of the index before signing the lease.

FAQ

Frequently asked questions about the tourist diner and expansion

Why is the tourist's high ticket dangerous for opening a second restaurant?

Because it is revenue that barely repeats. The tourist pays 34.7% more but returns 6.3 times less, so their 12-month LTV (USD 41) is a quarter of the resident's (USD 168). Projecting the expansion on that ticket inflates the return and delays break-even by 4.5 months.

What is a healthy tourist mix for a new location?

The index suggests keeping the projected mix below 55% tourists. Above that threshold, resident repeat visits are no longer enough to sustain cash outside high season, and the second location depends on the seasonal peak, which is the risk that causes the most failures in expansion.

Do tourist reviews help or hurt online reputation?

They raise volume and lower the rating. The tourist reviews 2.1 times more than the resident but scores 0.3 points below (4.1 vs 4.4) and never returns to correct it. Shield your base rating with resident reviews before exposing yourself to the tourist peak; the resident does come back to defend the reputation.

How do I measure my own mix without the Masterestaurant system?

Tag 90 days of tabs by simple signals: reservation app language, foreign payment method, day and hour, and the location from which the booking is made. With that classification, compute a segment-weighted LTV. You do not need special software; you need the discipline not to project on the blind average ticket.

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
Delivery en América Latina	**las apps de última milla sostienen crecimiento de doble dígito anual**	Bloomberg Línea
Preferencia de pedido directo	**67% prefiere pedir desde la web/app del restaurante**	Statista
Crecimiento del pedido online	**+300% más rápido que el dine-in desde 2014**	Nation's Restaurant News
Adopción de apps de comida	**78% de adultos descargó ≥1 app de comida**	National Restaurant Association

Metric	Benchmark 2026	Source
Tendencias de consumo digital	**el delivery digital crece a doble dígito anual**	World Economic Forum
Video corto y descubrimiento	**el video corto es el canal de descubrimiento de restaurantes que más crece**	Forbes