

# Restaurant Customer Acquisition Barometer 2026: which channel fills tables and which burns budget

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

## QUICK VERDICT

**Verdict: the cheapest channel to fill tables in 2026 isn't paid ads — it's owned repeat (CAC \$2.10, payback on the first visit). Delivery captures volume but at the highest CAC in the index —\$18.40 per new diner— with an LTV that rarely recovers the commission. Social ads pay off only when the ticket clears \$22 and the table returns; below that, they burn budget. Index rule: rank channels by payback in visits, not by reach.**

 **Original Study / Industry Index** · First-party research · methodology & sample disclosed

 Methodology: n=320 · 11 min read · 2026-07-07

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The mistake I see over and over in a restaurant boardroom: the marketing budget is decided by what 'sounds good' —Instagram, an influencer, the delivery app— not by what each channel costs to bring a table that comes back. Over three years Masterrestaurant audited the cash of 320 restaurants across eight countries and measured the uncomfortable number: what each new diner truly costs per channel, how much they leave over their lifetime, and in how many visits that acquisition pays off.

The Barometer is not a summary of others' studies. It is primary research: 320 operations, their real cash statements, loyalty panels and platform settlements. What comes out breaks the consensus: the channel that 'fills' most —delivery— destroys the most margin per diner, while the channel almost nobody budgets —the owned base— fills tables cheapest. This index gives you the healthy range per segment so you stop paying twice for the same customer.

## SIDE-BY-SIDE COMPARISON

### Side-by-side comparison

	ACQUISITION CHANNEL MEASURED	MASTERRESTAURANT 2026 OWN DATA (CAC · LTV · PAYBACK)
<b>Owned repeat (CRM/base)</b>	✗ Fast casual · 1 site	✓ CAC \$2.10 · LTV \$214 · payback 1.0 visit
<b>Diner referral</b>	✗ Full service · 3-10 sites	✓ CAC \$4.80 · LTV \$286 · payback 1.3 visits
<b>Local SEO + reviews</b>	✗ Full service · 1 site	✓ CAC \$6.90 · LTV \$198 · payback 2.1 visits

	ACQUISITION CHANNEL MEASURED	MASTERRESTAURANT 2026 OWN DATA (CAC · LTV · PAYBACK)
Social ads (Meta/TikTok)	× Fast casual · 3-10 sites	✓ CAC \$11.30 · LTV \$141 · payback 3.4 visits
Paid local influencer	× QSR · multi-unit	✓ CAC \$13.70 · LTV \$96 · payback 4.8 visits
Delivery marketplace	× QSR · multi-unit	✓ CAC \$18.40 · LTV \$73 · payback never recovers commission

### Finding 1 — What is the cheapest channel to fill tables in 2026?

**The cheapest channel to fill tables in 2026 is your own repeat base: a \$2.10 CAC per reactivated diner and payback on the first visit.**

Across the 320 operations Masterrestaurant audited over three years in eight countries, the owned base —CRM, email, direct message to the guest who already ate— filled tables at a cost 8.7 times lower than the index average. The mistake I see over and over in the boardroom is budgeting by what 'sounds good' —Instagram, an influencer, the delivery app— instead of by what it costs to bring in a table that comes back. Delivery marketplace, by contrast, captures volume but carries the priciest CAC in the Barometer: \$18.40 per new diner, nearly nine times the owned base. This is not a nuance: it is the line between a channel that builds cash and one that burns it. Reach doesn't pay payroll: two channels with the same reach can have paybacks of 1 visit and 4.8 visits, and only the second number decides whether a channel builds or destroys cash.

### Finding 2 — Reach doesn't pay payroll: why payback decides

In the Barometer we rank each diner source not by how many tables it 'fills' but by how many visits it takes to return what capturing it cost. Owned repeat pays back on the first visit —\$2.10 recovered right away. Delivery marketplace takes 4.8 visits to return its \$18.40, and in 61% of the QSR operations audited the platform commission ate the margin before the diner ever repurchased. That is the uncomfortable fact the consensus ignores: a channel with massive reach and slow payback doesn't fill cash, it empties it. Diego F. Parra puts it this way in every audit: watch the second number, not the headline. Delivery marketplace captures the highest volume of new diners in the index —34% of total attributed— but with the priciest CAC (\$18.40) and the lowest LTV (\$73) of every source measured. That contrast is the heart of the Barometer: the channel that 'fills' most is the one that destroys the most margin per diner.

### Finding 3 — Delivery: the highest volume and the worst LTV in the index

With platform commissions running from 18% to 30% of each ticket, in 61% of the QSR operations audited the commission ate the margin before the guest repurchased even once. An LTV of \$73 over a CAC of \$18.40 yields an LTV/CAC ratio of just 4.0, the poorest in the index, against the double-digit ratios the owned channels deliver. Masterrestaurant does not say switch delivery off: it says cost it as expensive acquisition, not as if it were free, and use it to capture, never to retain. The owned base and referral are the two cheapest channels in the Barometer and at the same time the least budgeted: 58% of the restaurants audited had not a single cent assigned to activating their CRM. That is the contradiction we audited across 320 operations —a \$2.10 CAC and single-visit payback for the owned base— wasted by pure budget inertia.

#### **Finding 4 — The cheapest channels are the least budgeted**

Referral costs a little more and brings diners with high LTV because they arrive pre-sold by someone who already trusts the house. Meanwhile, most of the budget flows to the paid channels with the highest CAC. The mistake I see over and over is paying twice for the same customer: first to the marketplace that brought them and again in ads to 'win them back', when a direct message from the CRM would have reactivated them for \$2.10. The healthy range by segment exists because a \$18.40 CAC ruins a low-ticket QSR but is tolerable in fine dining with a three-digit ticket. The Barometer delivers ranges calibrated by format —QSR, casual, fine dining, dark kitchen— on the real cash statements of 320 operations, not on averages from third-party studies. In QSR the \$18.40 delivery CAC against a \$9.50 average ticket demands almost two visits just to break even, which is why the 4.8-visit payback proves lethal in that format.

#### **Finding 5 — How to read the healthy range by segment**

In fine dining, with LTV above \$600, that same CAC is absorbed in under one visit. The operating rule Masterrestaurant sets: no channel should exceed 30% of the expected LTV of its segment. If it does, either the commission drops, or that channel captures to retain with the owned base, or it gets switched off. The Barometer dismantles the consensus that 'more reach = more tables filled': the highest-reach channel in the index, delivery marketplace, is the one that destroys the most margin per diner, and the least-budgeted one —the owned base— is the cheapest to fill. This does not come from theory but from primary research: 320 operations, their platform settlements, their loyalty panels and their cash statements audited over three years in eight countries. The fact that most unsettles the board is that 58% did not budget their CRM while paying a \$18.40 CAC in delivery: they pay twice for the same customer.

#### **Finding 6 — What the Barometer dismantles about marketing consensus**

Diego F. Parra insists the right question is not 'which channel is trending' but 'in how many visits does each table I bring pay for itself'. The index ranks by payback precisely so that decision stops being made by what 'sounds good'. Reach doesn't pay payroll: two channels with equal reach can have paybacks of 1 visit and 4.8 visits. The index ranks by the second number — the one that decides whether the channel creates or destroys cash. Delivery marketplace captures the largest volume of new diners in the index (34% of attributed total) but at the highest CAC (\$18.40) and lowest LTV (\$73): in 61% of audited QSR operations, the commission eats the margin before the diner returns. The owned base and referral —the two cheapest channels— are the least budgeted: 58% of audited restaurants had not a single dollar allocated to activating their CRM, despite that being where the \$2.10 CAC and one-visit payback live.

#### **POINT BY POINT**

## Traditional (by reach) vs Masterrestaurant Barometer (by payback)

### HOW THE BUDGET IS DECIDED

**A · ACQUISITION CHANNEL MEASURED** By reach, followers and impressions

**B · MASTERRESTAURANT** By payback in visits and net cash contribution

**Verdict:** Reach doesn't pay payroll; the index ranks by payback.

### TREATMENT OF DELIVERY

**A · ACQUISITION CHANNEL MEASURED**  
Growth channel without netting commission

**B · MASTERRESTAURANT** Volume measured with commission subtracted from LTV

**Verdict:** It captures revenue (\$18.40 CAC), not cash (\$73 LTV).

### OWNED BASE AND REFERRALS

**A · ACQUISITION CHANNEL MEASURED**  
'Free', never measured or activated

**B · MASTERRESTAURANT** Channel #1 by payback (CAC \$2.10, 1 visit)

**Verdict:** 58% don't budget it: that's where hidden margin sits.

## TABLE ATTRIBUTION

**A · ACQUISITION CHANNEL MEASURED** No code; assumed by the channel that 'sounds good'

**B · MASTERRESTAURANT** Each new diner attributed by code/survey

**Verdict:** Without attribution there's no measurable CAC or sound decision.

## SIDE-BY-SIDE COMPARISON

### How the traditional business measures (by reach) TRADITIONAL APPROACH

- ✗ Budget by followers and impressions, not by tables that return
- ✗ Delivery as a growth channel, without netting commission from LTV
- ✗ Influencer hired for reach, no code to attribute the table
- ✗ Reviews and owned base treated as 'free', never measured or activated

### How the Masterrestaurant Barometer measures (by payback) MASTERRESTAURANT

- ✓ Real CAC per channel = total channel spend ÷ attributed new diners
- ✓ Net LTV = contribution margin × lifetime visits, minus commissions
- ✓ Payback in number of visits to recover that diner's CAC
- ✓ Each channel ranked by payback and net cash contribution, not by reach

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THE NUMBERS THAT MATTER

The Barometer 2026 scorecard (own data, n=320)

**2.1 USD**

CAC of owned repeat — the cheapest channel in the index

**18.4 USD**

CAC of delivery marketplace — the most expensive per new diner

**34%**

of new diners arrive via delivery, but with the lowest LTV

**58%**

of audited restaurants with no budget to activate their owned base

**4.8x**

payback visits of paid influencer in QSR multi-unit

**320**

restaurant cash audits across 8 countries (2023-2026)

VISUALIZATION

The numbers, visualized

CAC of owned repeat — the cheapest channel in the index

 2.1USD

CAC of delivery marketplace — the most expensive per new diner

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of new diners arrive via delivery, but with the lowest LTV

 34%

of audited restaurants with no budget to activate their owned base

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restaurant cash audits across 8 countries (2023-2026)

 320

Sources: Masterrestaurant internal data

Chart by masterrestaurant.com

## REAL CASE

*“We were billing more than ever through delivery and every quarter we had less cash. The Barometer showed us we paid \$18 for a diner who left \$73 of lifetime margin against a 27% commission: it wasn't growing, it was leaking. We moved that budget to activate our base of 8,400 contacts and cut average CAC from \$14 to \$5.60 in a quarter — same revenue, 22% more margin.”*

**— Owner of a full-service group (3 sites), Masterrestaurant audit 2026**

## HOW TO APPLY IT IN YOUR RESTAURANT

### How to place yourself in the index and reallocate your budget

#### 1. Calculate your real CAC per channel

Take each channel's total spend last quarter —ads, delivery commissions, influencer fees, CRM hours— and divide by the new diners you attributed to that channel (code, coupon, reservation or table survey). No attribution, no CAC; start by asking 'how did you hear about us' at every new table for 30 days.

## 2. Measure net LTV, not the ticket

Multiply contribution margin per diner (not gross ticket) by lifetime visits, and SUBTRACT platform commissions. A delivery diner with a \$30 ticket and 27% commission leaves far less margin than a dine-in diner with a \$22 ticket who returns three times a month.

## 3. Rank by payback, not reach

Divide CAC by margin per visit to see in how many visits each channel pays off. Sort your table from highest to lowest payback. Any channel with payback >4 visits is a cut candidate unless its LTV justifies it: that's the hard rule of the index.

## 4. Reallocate to the owned base first

Before adding a dollar to ads, activate the \$2.10-CAC channel: your CRM. A repeat campaign to the existing base almost always lowers the business's average CAC faster than any cold channel. Only then scale the paid channels that clear the payback threshold.

### FAQ

## FAQ about the Customer Acquisition Barometer 2026

### What is the cheapest acquisition channel for a restaurant in 2026?

Per the Masterrestaurant Barometer 2026 (n=320), repeat to the owned base: CAC of \$2.10 and payback on the first visit. It's the least-budgeted channel despite being the most profitable, because 58% of audited restaurants allocate no budget to it.

### Does delivery capture profitable customers?

It captures volume —34% of new diners— but at the highest CAC in the index (\$18.40) and the lowest LTV (\$73). In 61% of audited QSR operations the commission eats the margin before the diner returns, so it captures revenue, not cash.

### How do I calculate my restaurant's real CAC per channel?

Divide each channel's total quarterly spend —ads, commissions, fees, CRM hours— by the new diners you attributed to it via code, coupon or table survey. Without attribution there is no measurable CAC; start by asking 'how did you hear about us' for 30 days.

### When are paid social ads worth it?

When the ticket clears \$22 and the table returns: in that scenario payback drops to 3.4 visits in fast casual. Below that ticket, or without repeat, ads burn budget because the LTV never recovers the CAC.

## Sector data 2026 (official sources)

Verifiable industry benchmarks from official, non-commercial sources (government, industry associations, market research) - not competitors.

Metric	Benchmark 2026	Source
Adopción de apps de comida	<b>78% de adultos descargó ≥1 app de comida</b>	National Restaurant Association
Tendencias de consumo digital	<b>el delivery digital crece a doble dígito anual</b>	World Economic Forum
Video corto y descubrimiento	<b>el video corto es el canal de descubrimiento de restaurantes que más crece</b>	Forbes
Delivery en América Latina	<b>las apps de última milla sostienen crecimiento de doble dígito anual</b>	Bloomberg Línea
Preferencia de pedido directo	<b>67% prefiere pedir desde la web/app del restaurante</b>	Statista
Crecimiento del pedido online	<b>+300% más rápido que el dine-in desde 2014</b>	Nation's Restaurant News

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