

The Masterrestaurant Restaurant Email Index 2026: owned database vs rented audiences

By  **Diego F. Parra** · Updated 2026-07-09 · Marketing & Growth

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Índice Masterrestaurant del Email Gastronómico 2026: la base propia frente al alquiler de audiencias

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QUICK VERDICT

Verdict: the owned database wins. An email to your own list opens 25.1% of the time (Omnisend, 2024) and gains 26% with personalization (Stripo, 2025), while renting audiences on aggregators has seen acquisition cost climb 222% over eight years to 2025 (Marqii, 2025). The guest you *own* on your list carries healthy contribution margin; the one you *rent* from the platform pays a toll every time. Build an owned asset; use rentals only as a measured capture channel.

 **Masterrestaurant Study / Sector Synthesis** · Expert synthesis · cited industry sources · 12 min read

· 2026-07-09

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In 2026 restaurant growth turns on a unit-economics decision: build an owned audience asset (email, loyalty list, verified phone) versus renting access to the guest every time you want to sell, via delivery aggregators, paid social or influencers. This Masterrestaurant Analysis synthesizes the available public data with a senior

consultant's reading.

The point is not ideological. It is cash. Customer acquisition cost rose 222% over the eight years to 2025 per Marqii (2025), and attracting and retaining customers is the top challenge for 33% of industry professionals in 2026 per Toast (2026). When retention and repeat depend on a channel you do not control, every point of guest LTV erodes in commissions and audience tolls.

Diego F. Parra and Masterrestaurant publish this synthesis so the owner can decide with numbers, not fashion: where to put the next restaurant-marketing dollar when the funnel has become expensive at the top and fragile at the bottom.

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	OWNED DATABASE (EMAIL + LOYALTY)	RENTED AUDIENCES (AGGREGATORS, PAID, CREATORS)
Open rate / engagement	✗ 25.1% average email open (Omnisend, 2024); +26% with personalization (Stripo, 2025)	✓ 42% of local searchers click the map pack (Semrush, 2025); reach varies by auction
Acquisition cost / toll	✗ Near-zero marginal cost per send to owned list; the asset amortizes	✓ CAC +222% over 8 years to 2025 (Marqii, 2025); recurring per-transaction commission
Effect on average check	✗ +23% customer value with rewards (Paytronix, 2024); member check grows faster than price in 55% of cases (Paytronix, 2024)	✓ +9% check with QR ordering vs dine-in (Sunday, 2025), but no data ownership
New-guest capture	✗ ~110 new loyalty members per store per month at top QSRs (Paytronix, 2024)	✓ 78% of adults downloaded ≥1 food app (NRA); +30% reservations the week post-creator (Marketing LTB, 2025)
Retention and repeat	✗ +16.5% YoY spend with 1-to-1 targeting (Paytronix, 2025); loyalty adoption projected 80% by end-2025 (LoyaltyPass, 2026)	✓ Repeat depends on the third-party algorithm; no owned list means no direct reactivation
Guest data ownership	✗ Full: email, phone, history, frequency — an asset transferable across locations	✓ None or partial: the platform keeps identity and behavior

Finding 1 — Owned database or rented audience: which wins in 2026?

The owned database wins, and not out of preference but out of cash math. An email sent to your own list opens 25.1% of the time per Omnisend (2024), and rises 26% more when the message is personalized per Stripo (2025).

At the same time, customer acquisition cost climbed 222% in the eight years through 2025 per Marqii (2025): renting access to the diner gets pricier with no visible ceiling. Diego F. Parra sums it up at Masterrestaurant: the owned list is capital that amortizes location by location, while the rented audience is a toll you pay every time you want to sell to someone who already knows you. When 33% of professionals cite attracting and retaining customers as their top challenge in 2026 per Toast (2026), the owner who controls the contact channel controls the margin. Customer acquisition cost rose 222% in the eight years through 2025 per Marqii (2025), and that figure reorders the whole arithmetic of restaurant marketing.

Finding 2 — Acquisition cost rises 222% and erodes the diner's LTV

Every dollar coming in through rented audience buys less diner than five years ago, and the diner captured that way isn't yours: he lives in the third party's algorithm. That is why 33% of professionals cite attracting and retaining customers as the top challenge of 2026 per Toast (2026). The real problem isn't acquiring once, it's reactivating without paying the toll again. I've seen restaurants with full rooms and flat profit exactly here: they pay the first visit at an inflated price and then have no way to call that customer back. The owned base breaks that cycle because the second, third and tenth contact cost close to zero. Email sent to an owned list opens 25.1% of the time on average per Omnisend (2024), and when the message is personalized the open rate rises 26% more per Stripo (2025). That engagement belongs to the owner, not leased to a reach auction that shifts every week.

Finding 3 — Owned-list email opens 25.1% and rises 26% with personalization

The difference from the aggregator is structural: email has near-zero marginal cost per send, while the platform charges commission on every transaction and compresses the order's contribution margin. Add SMS, which raises engagement 25% in food and beverage per Tabular (2025). An owner with a verified phone and consented email holds two direct channels that respond when he decides, not when the algorithm allows. That is the invisible edge separating a restaurant with an audience asset from one that only rents attention on impulse. One-to-one targeting raises member spend 16.5% year over year per Paytronix (2025), and value per customer grows 23% with rewards programs per Paytronix (2024). These figures explain why the owned base isn't just another channel but a repeat-purchase engine. When 55% of restaurants report their loyalty members' ticket grew more than their menu prices per Paytronix (2024), we're looking at real margin, not vanity metrics.

Finding 4 — Loyalty and 1-to-1 targeting: 16.5% more spend and 23% more value per customer

The aggregator's algorithm will never let you reactivate your diner on a slow Tuesday at 3 p.m.; your owned list will. By the end of 2025, 80% of restaurants are projected to have a loyalty program per LoyaltyPass, and the best QSRs enroll ~110 new members per store each month per Paytronix (2024). The owner who starts late competes against bases that already compounded. Rented audiences capture at the top of the funnel and the owned base converts at the bottom, and confusing those roles costs margin. It's true that 78% of adults have downloaded at least one food app per the National Restaurant Association, and a creator can lift bookings 30% the week after a post per Marketing LTB (2025). But that reach is borrowed and volatile. Third-party acquisition

makes sense as an entry door; the error is leaving the entire relationship there. A senior consultant's play is simple: pay for reach once, capture the email and phone on that first visit, and move the repeat purchase to an owned channel where a send costs almost nothing.

Finding 5 — Role in the funnel: rental captures at the top, the owned base converts at the bottom

Diego F. Parra calls it turning recurring expense into an amortizable asset. At the top you rent traffic; at the bottom you build the business. The channels that capture the diner's data in 2026 are the QR, the digital menu and the loyalty program, and none demands an agency budget. QR scan volume grew 433% in two years per QR Code (2025), and QR-code ordering lifts check size 9% versus traditional dine-in per Sunday (2025). With a full digital offer —menu, ordering and payment— the ticket rises 20% to 30% per Sunday (2025), and a restaurant saves an average of US\$3,600 a year with QR menus per QR Code (2025). Each scan is a chance to ask for the email in exchange for value. The tactic I recommend from Masterrestaurant: turn every table into a consented data-capture point, not just a transaction. That way the next sale is no longer bought, it's summoned.

Finding 6 — Cash verdict: where to put the next marketing dollar

The next marketing dollar should go to building the owned audience asset, with rental reserved for disciplined top-of-funnel capture. The arithmetic is decisive: 25.1% open rate on the owned list per Omnisend (2024), 26% more with personalization per Stripo (2025) and 16.5% higher spend with 1-to-1 targeting per Paytronix (2025), against an acquisition cost that rose 222% in eight years per Marqii (2025). When attracting and retaining is the challenge for 33% of the sector per Toast (2026), the winner is whoever controls the repeat-purchase channel. The concrete action I leave the owner: in the next 90 days, install email and phone capture at every touchpoint —QR, table, counter— and shift 30% of the ad budget toward owned email and SMS. That's not a trend; it's protecting the margin. Asset ownership: the owned list is capital that amortizes and travels across locations; the rented audience is a recurring expense rising 222% over 8 years (Marqii, 2025).

Finding 7 — The differences that decide where the next dollar goes

Cost structure: email carries near-zero marginal cost per send; the aggregator charges commission on every transaction, compressing the order's contribution margin. Engagement quality: 25.1% owned open (Omnisend, 2024) versus variable auction reach; personalization adds 26% more opens (Stripo, 2025). Retention effect: 1-to-1 targeting lifts spend 16.5% YoY (Paytronix, 2025); the third-party algorithm won't let you reactivate your guest when you decide to. Funnel role: rentals capture at the top (78% use food apps, NRA); the owned base converts and re-sells at the bottom, where guest LTV lives.

POINT BY POINT

A/B analysis: owning vs renting audience, criterion by criterion

RETURN PER DOLLAR INVESTED

A · OWNED DATABASE (EMAIL + LOYALTY)

Email to owned list amortizes the asset: 25.1% open (Omnisend, 2024) and near-zero marginal cost.

B · MASTERESTAURANT Renting charges per access: CAC +222% over 8 years (Marqii, 2025).

Verdict: Owned base wins: return grows while rental cost accelerates.

SPEED OF REACH

A · OWNED DATABASE (EMAIL + LOYALTY)

Grows with capture; requires building the list before scaling.

B · MASTERESTAURANT Immediate reach: 78% use food apps (NRA); +30% reservations post-creator (Marketing LTB, 2025).

Verdict: Rentals win on top-of-funnel speed, not on ownership or repeat.

EFFECT ON CONTRIBUTION MARGIN

A · OWNED DATABASE (EMAIL + LOYALTY)

High: lifts customer value 23% (Paytronix, 2024) with no per-transaction commission.

B · MASTERESTAURANT Low: aggregator commission compresses each order's margin.

Verdict: Owned base wins: it protects margin; renting erodes it by design.

3-YEAR SUSTAINABILITY

A · OWNED DATABASE (EMAIL + LOYALTY)

Compounds: the asset and guest LTV grow with directed repeat (+16.5% with 1-to-1, Paytronix 2025).

B · MASTERRESTAURANT Degrades:

dependence on the third-party algorithm and a rising toll.

Verdict: Owned base wins for any operator planning to scale and sell the business.

SIDE-BY-SIDE COMPARISON

Owned database AN ASSET THAT AMORTIZES

- ✗ Email with 25.1% average open (Omnisend, 2024), +26% when personalized (Stripo, 2025)
- ✗ Loyalty that lifts customer value 23% (Paytronix, 2024)
- ✗ Member check grows faster than plate price in 55% of restaurants (Paytronix, 2024)
- ✗ Near-zero marginal cost per send: high contribution margin on the channel
- ✗ The guest data is yours and travels across locations as you scale

Rented audiences MASTERRESTAURANT

- ✓ CAC rose 222% over 8 years to 2025 (Marqii, 2025): the toll accelerates
- ✓ 78% of adults already use food apps (NRA): reach yes, ownership no
- ✓ +30% reservations the week after a creator (Marketing LTB, 2025), a short-lived effect
- ✓ 42% of local searchers click the map pack (Semrush, 2025): rented traffic
- ✓ No owned list means no direct reactivation: every sale pays for access again

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THE NUMBERS THAT MATTER

The 2026 restaurant email scorecard (cited figures)



23%

More customer value with rewards programs

16.5%

YoY spend increase with 1-to-1 targeting

80%

Projected loyalty program adoption by end-2025

VISUALIZATION

The numbers, visualized

Average email marketing open rate (2023)



More opens with personalized email



Rise in acquisition cost over 8 years to 2025



More customer value with rewards programs



YoY spend increase with 1-to-1 targeting



Projected loyalty program adoption by end-2025



Sources: [Omnisend 2024](#) · [Stripo 2025](#) · [Marqii 2025](#) · [Paytronix 2024](#) · [Paytronix 2025](#)

Chart by [masterrestaurant.com](#)

REAL CASE

“The cost of acquiring a new customer through third-party channels has become unsustainable for the margin. Operators who build direct relationships and owned data are the ones protecting profitability; those who depend on rented audiences watch commission eat every point of growth.”

— Synthesis of the public position of Paytronix and Toast analysts on restaurant-marketing unit economics, 2024-2026

HOW TO APPLY IT IN YOUR RESTAURANT

How to position: from renting to owning in 4 steps

1 Convert rented traffic into an owned list

Every guest arriving via delivery, map pack (42% click, Semrush 2025) or creator (+30% reservations, Marketing LTB 2025) should leave with their email or phone captured. QR menu, wifi and digital pay are capture points: 78% already use apps (NRA), so use that to migrate identity to the owned asset.

2 Turn on personalization from the first send

A personalized email opens 26% more (Stripo, 2025) on top of the 25.1% baseline open (Omnisend, 2024). Segment by frequency and average check from day one; 1-to-1 targeting lifts spend 16.5% YoY (Paytronix, 2025). Don't wait for 'enough' contacts: personalize with whatever you have.

3 Build loyalty to raise customer value

Rewards programs lift customer value 23% (Paytronix, 2024) and in 55% of restaurants the member check grows faster than the plate price (Paytronix, 2024). Top QSRs enroll ~110 new members per store per month (Paytronix, 2024): set that target per location and track it weekly.

4 Measure each channel's CAC against its LTV

With CAC rising 222% over 8 years (Marqii, 2025), every rented channel must justify its toll against the guest LTV it delivers. Masterrestaurant rule: if a channel costs more than a third of the guest's contribution margin, either migrate its data to the owned list or cut it.

FAQ

FAQ on owned email vs rented audiences

Why does an owned base outperform renting audiences in 2026?

Because acquisition cost rose 222% over 8 years to 2025 (Marqii, 2025) while owned email opens 25.1% of the time (Omnisend, 2024) at near-zero marginal cost. The list is an asset that amortizes; the rented audience is a toll that rises every year.

Are delivery and apps no longer useful for growth?

They are useful, but as capture, not as an asset. 78% of adults use food apps (NRA): they're excellent for the top of the funnel. The mistake is stopping there. Migrate the guest's identity to your owned list to re-sell without paying commission again.

How much does an owned base lift the check?

Customer value rises 23% with rewards programs (Paytronix, 2024) and in 55% of restaurants the member check grows faster than the plate price (Paytronix, 2024). Personalization adds 26% more opens (Stripo, 2025), which translates into more repeat.

How do I know if a rented channel is worth it?

Compare its cost against the LTV of the guest it brings. Masterrestaurant rule: if a channel consumes more than a third of the customer's contribution margin, either migrate its data to the owned list or cut it. With CAC +222% (Marqii, 2025), that discipline protects profitability.

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
Aumento interanual del gasto de miembros con targeting 1 a 1	16,5%	Paytronix — Effectiveness of Loyalty Programs 2025
Restaurantes que ya operan algún programa de recompensas	más del 90%	Paytronix — Effectiveness of Loyalty Programs 2025
Tasa de apertura de email marketing considerada buena en restaurantes	43,6%	Stripo — Restaurant Email Marketing Statistics 2025
Retorno del email marketing por cada dólar invertido	US\$36 por US\$1	Stripo — Restaurant Email Marketing Statistics 2025
Aumento de apertura con mensajes de email personalizados	26% más	Stripo — Restaurant Email Marketing Statistics 2025
Redención de cupones de cumpleaños vs ofertas estándar por email	3 veces mayor	Stripo — Restaurant Email Marketing Statistics 2025