RESTAURANT INDUSTRY WHITEPAPER

Hijacked by the Middleman

Restaurants Make the Food, Carry the Risk, and Serve the Customer — While Delivery Platforms Control the Relationship and Take Up to 30%

A fact-based examination of marketplace commissions, restaurant margins, customer control, and the path from platform dependency to owned relationships.

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A note on language and evidence

The title of this paper is intentionally provocative. The analysis is not based on the premise that delivery marketplaces provide no value. They provide consumer discovery, ordering technology, payment processing, delivery logistics, support, and demand generation. The issue is what happens when a useful acquisition channel becomes the dominant gatekeeper between a restaurant and its customers.

All platform prices in this paper are taken from the companies' published U.S. merchant pages accessed in August 2026. Platform pricing can vary by market, contract, service level, regulation, and merchant. Restaurant margin and operator-survey findings are sourced to the National Restaurant Association. Arithmetic examples are illustrations, not claims about the economics of every restaurant or every order.

Executive summary

THE CENTRAL FINDING **Third-party delivery can generate revenue without generating profit—and can leave the restaurant paying repeatedly to reach a customer relationship it does not control.**

Off-premises dining is no longer optional for much of the industry. The National Restaurant Association reports that nearly three out of four restaurant orders are consumed off-premises, and 37% of adults order delivery at least weekly. The demand is real. So is the economic tension.

The Association's 2025 Restaurant Operations Data Abstract reported median pre-tax income of 2.8% of sales for full-service restaurants and 4.0% for limited-service restaurants. In a May 2026 survey submitted to the Federal Trade Commission, 47% of full-service operators and 43% of limited-service operators said they did not make a profit on third-party delivery orders. Two in three respondents said the average transaction fee paid to a third-party delivery platform was between 15% and 29.9%.

Published marketplace pricing explains why. DoorDash lists delivery commissions of 15%, 25%, and 30%, depending on the plan. Grubhub lists marketing commissions of 5%, 15%, and 20%, with use of its delivery fleet starting at an additional 10%. Uber Eats states that its marketplace pricing varies by plan and locality; its published page shows Lite marketplace fees starting at 15% in multiple U.S. markets and a 25% fee when merchants use Uber's delivery network for certain self-delivery orders.

The strategic conclusion is not that restaurants should abandon marketplaces. It is that restaurants should treat them as acquisition and fulfillment channels—not as the permanent owner of discovery, transactions, customer data, loyalty, and repeat ordering.

The evidence at a glance

Published fact	Finding	Primary source
Median pre-tax income	2.8% full-service; 4.0% limited-service	National Restaurant Association, 2025
No profit on third-party delivery	47% full-service; 43% limited-service	National Restaurant Association, May 2026 survey
Average platform transaction fee	15%–29.9% for two in three surveyed operators	National Restaurant Association, May 2026 survey
DoorDash marketplace delivery	15%, 25%, or 30%	DoorDash merchant pricing
DoorDash Marketplace customer data	DoorDash says it keeps the data	DoorDash merchant guidance, June 2026

Sources: National Restaurant Association [1–3]; DoorDash [4, 8]. Percentages are reproduced from the cited publications.

1. Delivery became essential—then became leverage

The restaurant industry did not adopt third-party delivery because operators wanted another layer between themselves and their guests. They adopted it because customers wanted convenience, mobile ordering, broad selection, real-time tracking, and doorstep fulfillment. Marketplaces assembled those capabilities at scale and concentrated demand in apps consumers already used.

The result is a genuine value exchange. A restaurant gains access to demand and logistics without building a delivery network from scratch. The platform earns a fee for generating, processing, and fulfilling the transaction. That exchange can be rational—especially when the customer is truly new and the order makes a positive contribution after all incremental costs.

The problem begins when access becomes dependence. According to the National Restaurant Association, almost 75% of restaurant traffic now occurs off-premises. Its May 2026 filing with the FTC says 68% of delivery customers had used a third-party delivery service in the prior six months. Among restaurants offering third-party delivery, 63% of limited-service and 41% of full-service operators were available on three or more platforms.

DEPENDENCY TEST **If turning off a platform would make the restaurant invisible to a meaningful share of local demand, the platform is no longer merely a vendor. It is a gatekeeper.**

This creates an asymmetry. The restaurant bears the fixed costs of the kitchen, labor, rent, equipment, insurance, food safety, menu development, and brand reputation. The platform can influence whether the restaurant is seen, what the customer pays, how the transaction is routed, and whether the restaurant can directly reconnect with that customer.

Evidence: National Restaurant Association, 2025 Off-Premises Restaurant Trends [2] and May 2026 comments to the FTC [3].

2. The arithmetic behind the provocation

Restaurants are not 20%–30% margin businesses. The National Restaurant Association's 2025 Operations Data Abstract reported median income before taxes of 2.8% of sales for full-service restaurants and 4.0% for limited-service restaurants. The Association separately describes a typical restaurant as operating at roughly a 4-5% pre-tax margin, after food and labor each consume about one-third of sales and other expenses consume roughly 29%.

A marketplace commission is not directly comparable to a company-wide profit margin: one applies to a specific order subtotal, while the other reflects the entire operation after all costs. Still, placing the two numbers side by side reveals the pressure. A 25% fee on a marketplace order is many times larger than the pre-tax earnings a typical restaurant retains from an equivalent dollar of ordinary sales.

Illustrative economics of a $50 marketplace order

Marketplace rate	Platform fee	Restaurant receives before other costs	Fee as multiple of 5% benchmark profit*
15%	$7.50	$42.50	3×
25%	$12.50	$37.50	5×
30%	$15.00	$35.00	6×

*Illustration only. At a 5% pre-tax benchmark, $50 of ordinary sales would produce $2.50 of pre-tax profit. Calculation: order subtotal × commission rate. This does not assume the platform fee is the only incremental cost or that every restaurant earns 5% on every order. Margin benchmark: National Restaurant Association [1].

The commission is only one line. The restaurant may also face packaging, promotional discounts, refunds or remakes, integration costs, and optional advertising. The relevant question is therefore not, ‘Did the platform produce sales?’ It is, ‘After every variable cost and platform charge, did the order produce contribution—and did it create an asset the restaurant can use again?’

3. What the major platforms publish

To keep the comparison defensible, this paper uses the platforms’ own U.S. merchant pricing pages. The figures below are public list prices, not estimates of negotiated enterprise contracts.

Platform	Published marketplace structure	Important qualification	Source
DoorDash	15% Basic; 25% Plus; 30% Premier for delivery orders	6% pickup; direct Online Ordering is described as commission-free, excluding payment processing where applicable	DoorDash [4, 9]
Grubhub	5% Basic; 15% Plus; 20% All-access marketing commission	Grubhub Delivery starts at an additional 10%; terms and local pricing can vary	Grubhub [6]
Uber Eats	Plan- and market-specific; Lite starts at 15% in multiple listed U.S. markets	The same page states use of Uber’s delivery network for certain self-delivery orders carries a 25% fee; local rules vary	Uber Eats [5]

Pricing accessed August 10, 2026. Always verify the applicable market, plan, merchant agreement, taxes, processing, promotions, and optional advertising before making a decision.

The public prices also show that marketplaces are not monolithic. Each offers lower-fee or direct-ordering products. DoorDash describes its own Online Ordering product as commission-free. Uber Direct advertises a flat per-delivery fee starting at $6.99 in the U.S. and no commission. Grubhub Connect advertises no marketplace commission and flat or market-based delivery pricing. These alternatives reinforce the paper’s central distinction: marketplace discovery and last-mile fulfillment are separate services and do not have to be purchased as one permanent bundle.

4. The cost no invoice fully captures: control of the relationship

The commission is visible. The opportunity cost of lost customer continuity is less visible.

A marketplace customer can enjoy the restaurant's food without becoming part of the restaurant's reachable audience. The platform may remember the diner, payment method, order history, preferences, subscription status, and reorder behavior. The restaurant fulfills the order, but its ability to contact that diner directly for a future offer is constrained by the platform relationship and applicable consent rules.

This is not merely an outside critique. In June 2026, DoorDash's own merchant guidance stated: 'On DoorDash Marketplace, DoorDash keeps that data, while your direct channels through DoorDash Commerce Platform give you ownership of it.' The same company separately advises restaurants that an owned email list creates a direct line to customers 'with no middleman.' Those statements accurately describe the strategic divide.

THE OWNERSHIP GAP **The restaurant may receive the revenue from today's order while the platform retains the infrastructure for tomorrow's order.**

This distinction changes the economics of acquisition. A commission can be defensible when it purchases a genuinely new customer and the restaurant has a lawful, consent-based path to earn the next transaction directly. It becomes harder to defend when the same customer repeatedly returns through the marketplace and triggers the same percentage toll each time.

A $50 customer over ten orders

Orders	Gross marketplace sales	Fees at 25%	Fees at 30%
1	$50	$12.50	$15
5	$250	$62.50	$75
10	$500	$125	$150

Illustration: $50 subtotal per order × number of orders × stated commission. It excludes taxes, customer fees, discounts, advertising, refunds, processing differences, and delivery terms. It is not a forecast of customer behavior.

The most important word is not 'delivery.' It is 'repeat.' A restaurant can afford to pay more to acquire a new guest than it can afford to pay, indefinitely, for access to the same guest.

5. Visibility is a product—and a source of leverage

Marketplace pricing tiers do more than vary the commission. They often vary customer delivery fees, delivery radius, access to membership customers, advertising benefits, and exposure. DoorDash's own pricing materials say its 25% Plus plan expands access to DashPass customers and delivery area, while its 30% Premier plan offers the largest delivery area, the lowest customer fees, and automatic sponsored listings. Grubhub likewise associates higher marketing commissions with lower customer delivery fees and greater promotional support.

That structure creates a difficult choice for an independent operator: accept lower visibility and a lower fee, or surrender more of the order value for stronger marketplace access. This is not proof of misconduct; it is the commercial design of a marketplace. But it demonstrates why 'restaurants can simply choose the cheapest plan' is incomplete. The lower-price option may not provide equivalent access to demand.

The commission structure also shows up in what customers pay, not just what restaurants absorb. In the same May 2026 survey, 83% of limited-service operators and 66% of full-service operators said their restaurant charges more for menu items ordered through a third-party platform than for the same items ordered for dine-in or takeout. The commission is not simply deducted from the restaurant's margin; a meaningful share of it is passed forward as a higher price the customer pays without necessarily realizing why.

The Federal Trade Commission has also examined transparency and conduct in online food delivery. In April 2026, it sought public comment on whether a rule was needed to prevent unfair or deceptive fee practices. Separately, the FTC and Illinois Attorney General obtained a $25 million settlement with Grubhub in 2024 over allegations including misleading delivery costs and listing restaurants without permission. Grubhub agreed to the settlement; the citation is included to document regulatory scrutiny, not to imply that every platform or fee is unlawful.

Evidence: National Restaurant Association [3]; DoorDash [4]; Grubhub [6]; Federal Trade Commission [7, 10].

6. Why independent restaurants carry the greatest risk

A national chain and a neighborhood restaurant may appear in the same search results, but they do not enter the marketplace with the same leverage.

- Large chains can negotiate enterprise agreements; a single-location operator usually chooses from published or lightly negotiated terms.
- Chains spread technology, loyalty, advertising, and data infrastructure across many locations; independent operators must fund those capabilities from one income statement.
- Chains may already have consumer apps, large email databases, recognizable brands, and national media; independent restaurants often rely on the marketplace itself to be found.
- A chain can analyze channel profitability with dedicated finance and marketing teams; a mom-and-pop operator may see top-line platform sales without a complete order-level contribution analysis.

This is why the headline uses the word 'hijacked.' The restaurant is not physically prevented from leaving. The constraint is economic and behavioral, not physical: a restaurant can leave the marketplace, but its customers can't be made to follow. Winning them back requires tools, consent, marketing, and sustained execution — not a single decision, but ongoing work.

7. The answer is not withdrawal. It is a hybrid model.

Third-party platforms should remain part of the restaurant ecosystem. They solve real problems and can be effective at introducing a restaurant to new customers. The goal is not to replace every marketplace order. The goal is to stop treating a marketplace as the only route to digital demand.

THE OPERATING PRINCIPLE **Use marketplaces to be discovered. Use owned channels to be remembered, chosen again, and reached directly—with the customer's permission.**

A healthier model separates four functions that are often bundled together:

Function	Best-fit role for a marketplace	Capability the restaurant should own
Discovery	Expose the restaurant to customers searching across many options	Local brand, website, search presence, and community visibility
Transaction	Provide a convenient first order	Direct ordering and payment path
Fulfillment	Supply delivery capacity when needed	Choice of pickup, self-delivery, or flat-fee last-mile providers
Retention	Optional marketplace re-engagement	Consent-based email/SMS, loyalty, rewards, and direct customer history

A practical transition

1. **Measure contribution by channel.** Track subtotal, commission, promotions, advertising, packaging, refunds, payment costs, and incremental labor. Revenue alone is not the score.
2. **Define the marketplace's job.** Decide whether each platform is being used for discovery, overflow fulfillment, geographic reach, or repeat demand. Pay only for the role that creates value.
3. **Make direct ordering unmistakable.** Give existing customers a fast, mobile-friendly path from the restaurant's website, Google listing, QR materials, receipts, packaging, and social profiles.
4. **Earn permission to continue the relationship.** Invite customers to opt into loyalty, rewards, email, SMS, or a restaurant community. Do not scrape or misuse marketplace data.
5. **Give customers a reason to choose direct.** Offer convenience and value that do not depend on punitive discounting: easier reordering, loyalty progress, pickup benefits, exclusive items, or community rewards.

6. **Retain delivery without surrendering the transaction.** Use self-delivery or commission-free, flat-fee last-mile services where the order economics justify it.

8. From rented transactions to owned relationships

The next chapter of restaurant technology is not simply a cheaper ordering button. It is a system that allows independent restaurants to combine acquisition, direct ordering, optional delivery fulfillment, loyalty, communication, and repeat-business automation without giving a percentage of every future transaction to the source of the first introduction.

cirQQles developed Q-Bite around that premise. Third-party marketplaces can remain acquisition channels. Q-Bite gives the restaurant a direct ordering and relationship channel designed to help it retain customers, communicate with members who opt in, support loyalty and rewards, and use delivery fulfillment without making a marketplace the permanent owner of the transaction.

This paper does not claim that every direct order is free or that every marketplace order is unprofitable. Direct systems have software, payment, marketing, support, and delivery costs of their own. The strategic advantage is structural: the restaurant can evaluate those costs separately, build a reachable customer asset, and reduce the need to pay an acquisition-style percentage on every repeat order.

THE CONCLUSION **Customer acquisition is an expense. A direct, permission-based customer relationship is an asset.**

Restaurants should not have to disappear from the places customers search. Nor should being found require surrendering control of the relationship forever. The sustainable model is choice: marketplaces for reach, flexible logistics for fulfillment, and an owned channel for the customers the restaurant has earned.

Methodology and limitations

- Pricing was reviewed on public U.S. merchant webpages on August 10, 2026. Pricing and product terms may change after publication and may vary by market, regulation, merchant agreement, plan, service, and promotion.
- ‘Commission,’ ‘marketplace fee,’ ‘marketing commission,’ and ‘delivery fee’ are reproduced according to each platform’s terminology. They are not assumed to be identical services.
- The paper does not add consumer-paid delivery or service fees to restaurant-paid fees. Consumer and merchant economics are treated separately.
- Illustrations use simple multiplication and state all assumptions. They exclude tax, tips, menu markups, payment processing differences, promotions, advertising, refunds, packaging, labor, and food costs unless explicitly stated.
- Industry margins are medians or benchmarks, not guaranteed margins for a specific restaurant. Order-level contribution and company-wide pre-tax margin are different measurements.
- Statements about customer ownership refer to the ability to lawfully reach and activate a permission-based audience. They do not imply ownership of a person or unrestricted rights to personal data.

Sources

[1] **National Restaurant Association.** 2025 Restaurant Operations Data Abstract. August 20, 2025. Reports median pre-tax income of 2.8% for full-service and 4.0% for limited-service respondents.

[2] **National Restaurant Association.** Off-Premises Restaurant Trends 2025. April 15–16, 2025. Reports weekly delivery use and the scale of off-premises dining.

[3] **National Restaurant Association.** Comments to the FTC on Online Food Delivery Fees. May 14, 2026. Includes May 2026 operator survey findings on profitability and average transaction fees.

[4] **DoorDash.** DoorDash Merchant Fees & Pricing. accessed August 10, 2026. Lists 15%, 25%, and 30% marketplace delivery commission plans and 6% pickup.

[5] **Uber Eats for Merchants.** Pricing That Works for Your Business. accessed August 10, 2026. Describes market- and plan-specific marketplace pricing, local 15% Lite starting fees, and delivery-network terms.

[6] **Grubhub for Restaurants.** Grubhub Pricing and Fees. accessed August 10, 2026. Lists marketing commissions and delivery fees starting at 10%.

[7] **Federal Trade Commission.** FTC Seeks Public Comment on Unfair and Deceptive Fee Practices in Online Food and Grocery Delivery Services. April 14, 2026.

[8] **DoorDash for Merchants.** 15 Ideas to Attract Customers to Your Restaurant. June 18, 2026. States that DoorDash keeps Marketplace customer data while direct Commerce Platform channels provide merchant ownership.

[9] **DoorDash for Merchants.** Online Ordering System for Restaurants. accessed August 10, 2026. Describes commission-free direct ordering.

[10] **Federal Trade Commission.** FTC, Illinois Attorney General Take Action Against Grubhub. December 17, 2024. Documents the $25 million settlement and the government’s allegations.

[11] **Uber.** Uber Direct. accessed August 10, 2026. Advertises commission-free pricing starting at $6.99 in U.S. per delivery.

[12] **Grubhub for Restaurants.** Grubhub Connect. accessed August 10, 2026. Advertises no marketplace commissions and flat or market-based delivery pricing.

About cirQQles

cirQQles is a business platform built around direct, permission-based relationships. Its restaurant solution, Q-Bite, helps restaurants support direct ordering, loyalty, customer communication, and repeat business while continuing to use third-party marketplaces as acquisition channels when they create value.

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