

This year's survey results from enterprise Fast Casual & QSR brands show an intensified focus on **customer acquisition, employee experience, and price increases**—combined with a desire to consolidate tech systems.

Moving to a more unified ordering strategy was overwhelmingly agreed (88%) in an effort to **improve guest satisfaction and order accuracy**, while solving for labor challenges.

But with 64% of enterprise brands* still running their restaurants on legacy POS, it's clear that these guest and employee experience challenges will persist—and revenues will stagnate—until a more modern approach is embraced across the industry.



64% of Brands Still Use Legacy POS!



66% Moving to Unified Commerce

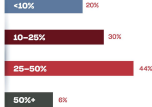


Ordering trends

25-50% of Sales were from Digital Orders in 2021

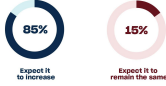
Most brands have more than doubled their digital growth in the past year and 85% expect their digital sales growth to continue in 2022.

Percentage of overall sales from digital ordering channels in 2021:



Digital Ordering Sales will Continue to Increase, said 85% of participants

In 2022, do you expect your digital ordering sales to:



Native Web vs. Third-Party

With the increase in digital sales comes the challenge of converting guests over to native, branded ordering channels in an effort to improve profitability, data collection and consistent experiences.



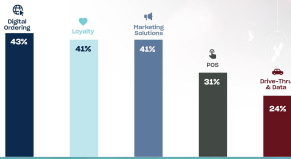
Top 5 Business Shifts due to Pandemic



Technologies Added in 2021

For the third year in a row, Online Ordering & Mobile/App were the top new technologies added in 2021, followed by Marketing Solutions & POS.

What types of technologies did you purchase/add to your stack?

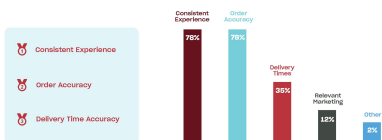


Ordering Channels Prioritizing for 2022

Which ordering channels are you prioritizing for investment?



Top Factors Impacting Guest Experience



87% Seek Improved Visibility into Kitchen Backlogs

How important is line of sight into kitchen production backlogs and the ability to throttle orders in real-time based on spikes in demand?



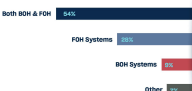
Consolidation Trends Favor Front vs. Back of House

76% of brands plan to consolidate their tech to drive efficiencies in 2022; with more than half consolidating both F+BOH systems

Are you consolidating your systems across the enterprise tech stack?



Which systems are you consolidating?



Participants

62 respondents from 50 Brands
 - 42% C-Suite execs; 37% VP/Dir
 - 28% IT; 24% Ops; 29% Mktg

*Enterprise restaurants defined as Fast Casual and QSR. Service chains with 20 or more locations.

QU is your restaurant transformation partner delivering a unified commerce platform to drive healthier connections with guests across all your order channels.