

# 25

6TH ANNUAL  
**STATE OF  
DIGITAL**



Qu's 6th annual State of Digital reveals  
top trends from QSR and Fast Casual  
operators in the enterprise space.

# **Enterprise restaurants are at a monumental inflection point**

While complexity and disruption continues, the time is now to embrace sound technology practices and tools. As you glance through the state of enterprise findings, we'd love to hear which insights resonate most with your brand and why. We're so honored to walk with you through these exciting times and welcome the opportunity to go beyond together.



# Key Takeaways

**Winning Back the Guest is  
Job #1**

**1**

**Tech Consolidation is Now  
a Mandate**

**2**

**Loyalty Without Unified  
Data Will Fail**

**3**

**Kiosk Surge Continues**

**4**

**Kitchen Innovation is the  
Next Efficiency Frontier**

**5**

**Digital Growth Stabilizes**

**6**

# Winning back the guest is job #1



## KEY INSIGHTS

- 1 Brands aim to own the guest relationship
- 2 Personalization will ensue
- 3 Catering is a rising priority

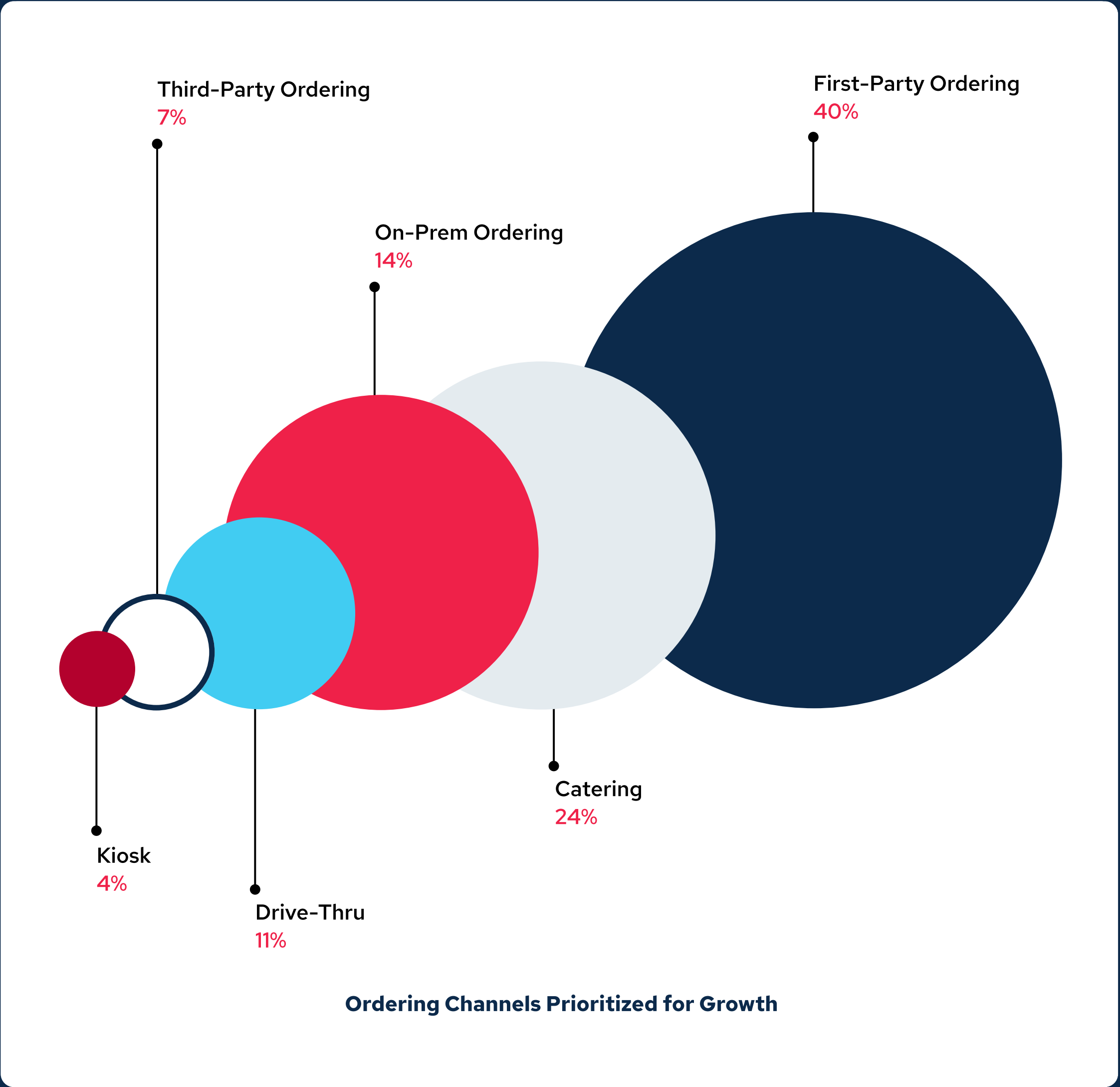




# Brands Double Down on First-Party Digital Ordering

A sharp focus on owning the guest relationship will drive stronger profits and set the stage for personalization.

40% of brands said first-party digital ordering will drive the highest revenue growth in 2025, as they seek to remove third-party interference, own the guest relationship, and increase profitability.



Kiosks ranked last as a revenue growth channel, signaling untapped potential and suggesting their primary role is to alleviate labor challenges and operational burdens.

# 40%

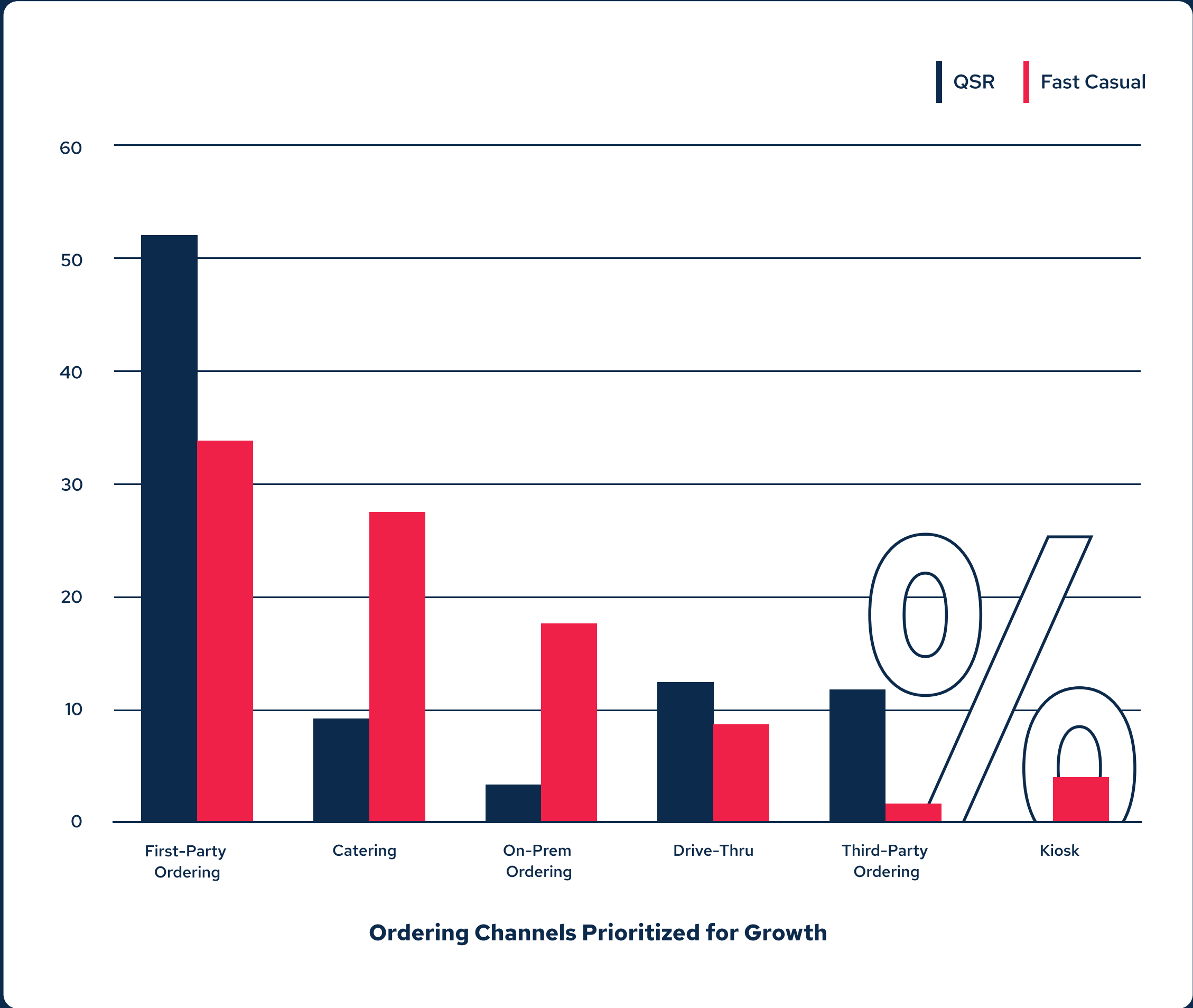
**of brands said first-party  
digital ordering will drive  
the highest revenue  
growth in 2025**



# Top Ordering Channels for Growth in 2025

Both QSRs and Fast Casuals ranked first-party online ordering as the top revenue growth opportunity.

After first-party ordering, QSRs prioritize drive-thru & third-party ordering; Fast Casuals focus on catering & on-premises ordering expansion.



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70% of guests prefer ordering directly from restaurants, and guest expectations for fast, easy digital experiences have never been higher. Regaining first-party data will result in more consistent, branded experiences and upsell opportunities.



# Tech Consolidation is Now a Mandate

2

## KEY INSIGHTS

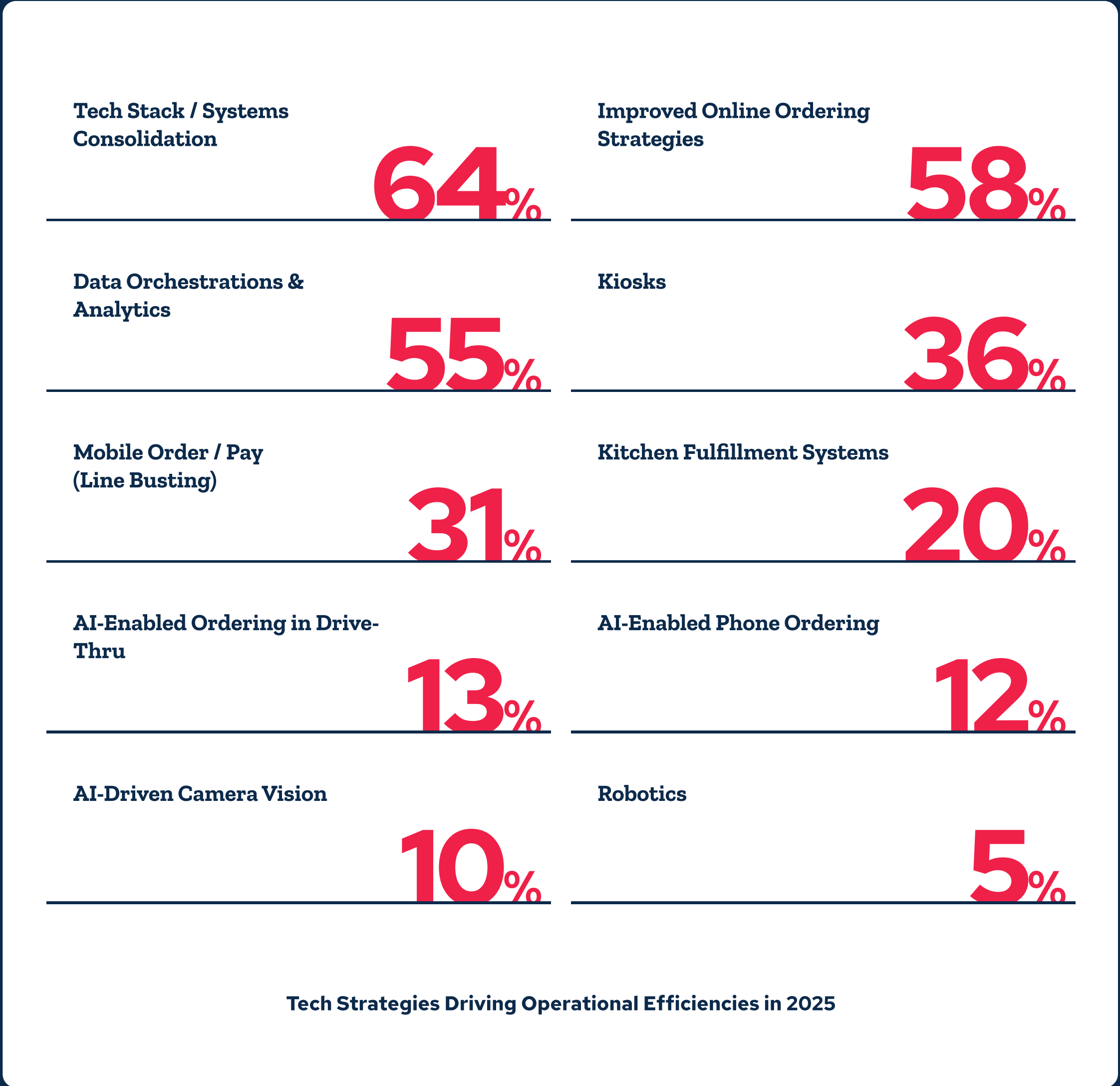
- 1 Brands need a future-proof foundation
- 2 Efficiency leads the charge
- 3 Unified systems win



# Tech Consolidation: Shaping the Future of AI & Innovation

Brands prioritize systems consolidation to drive efficiency and build a scalable foundation for future innovation.

64% of enterprise restaurants look to upgrade to unified systems that centralize data and improve operating efficiencies and real-time reporting.



A unified commerce platform with best-in-class systems is the catalyst for achieving this mandate and for seamlessly adding automation and AI in the future.

64%

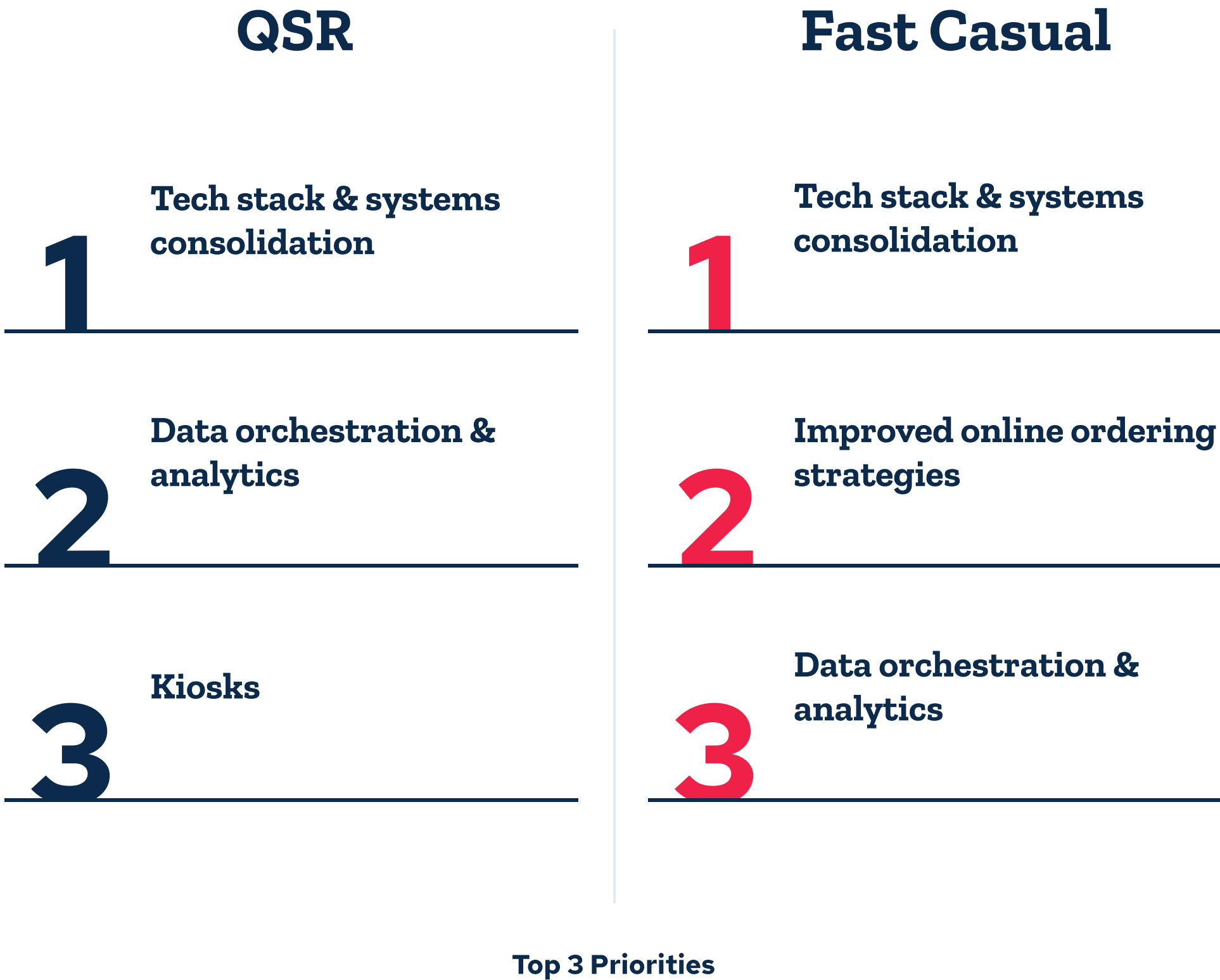
**of restaurants are  
prioritizing systems  
consolidation and 55% aim  
to centralize data**



# QSR & Fast Casual Brands Bet On Systems Consolidation to Boost Operating Efficiency

Across the board, unifying systems is the clear first step to ensuring efficient, profitable growth.

Both QSRs and Fast Casuals are prioritizing technology consolidation first, as they continue modernization efforts to implement future-forward systems.

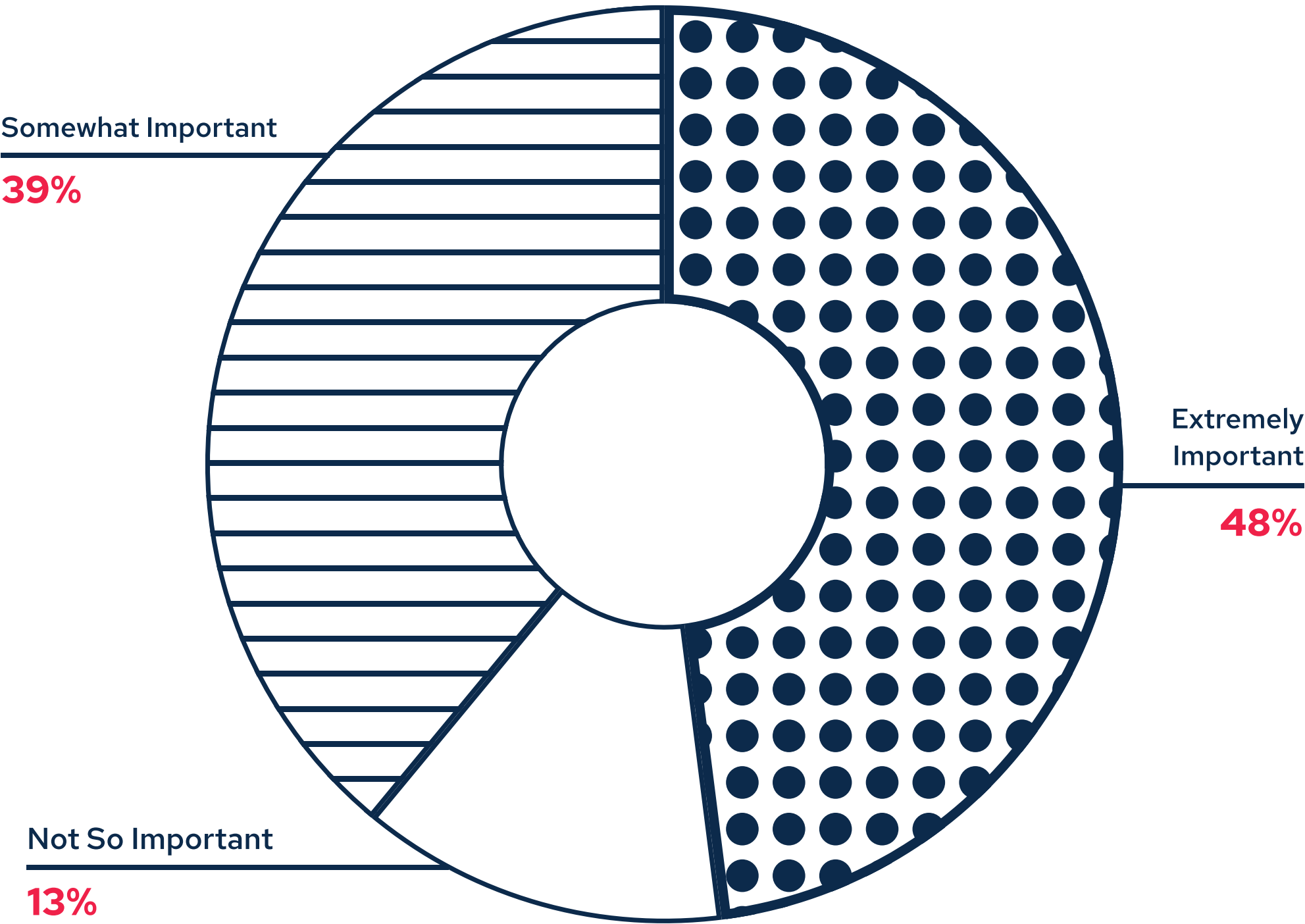


AI is a higher priority for QSRs, with AI-enabled drive-thru and phone ordering as the leading initiatives. While AI is still in early adoption phase, brands with consolidated, well-integrated systems will be able to add AI sooner, and easier.

# Unified Payments for a Unified Future

87% of brands say unifying payments is important.

Unifying payments is a must for achieving cost savings and getting to a single view of the guest.



Importance of Unified Payments



# Loyalty Without Unified Data Will Fail

3

## KEY INSIGHTS

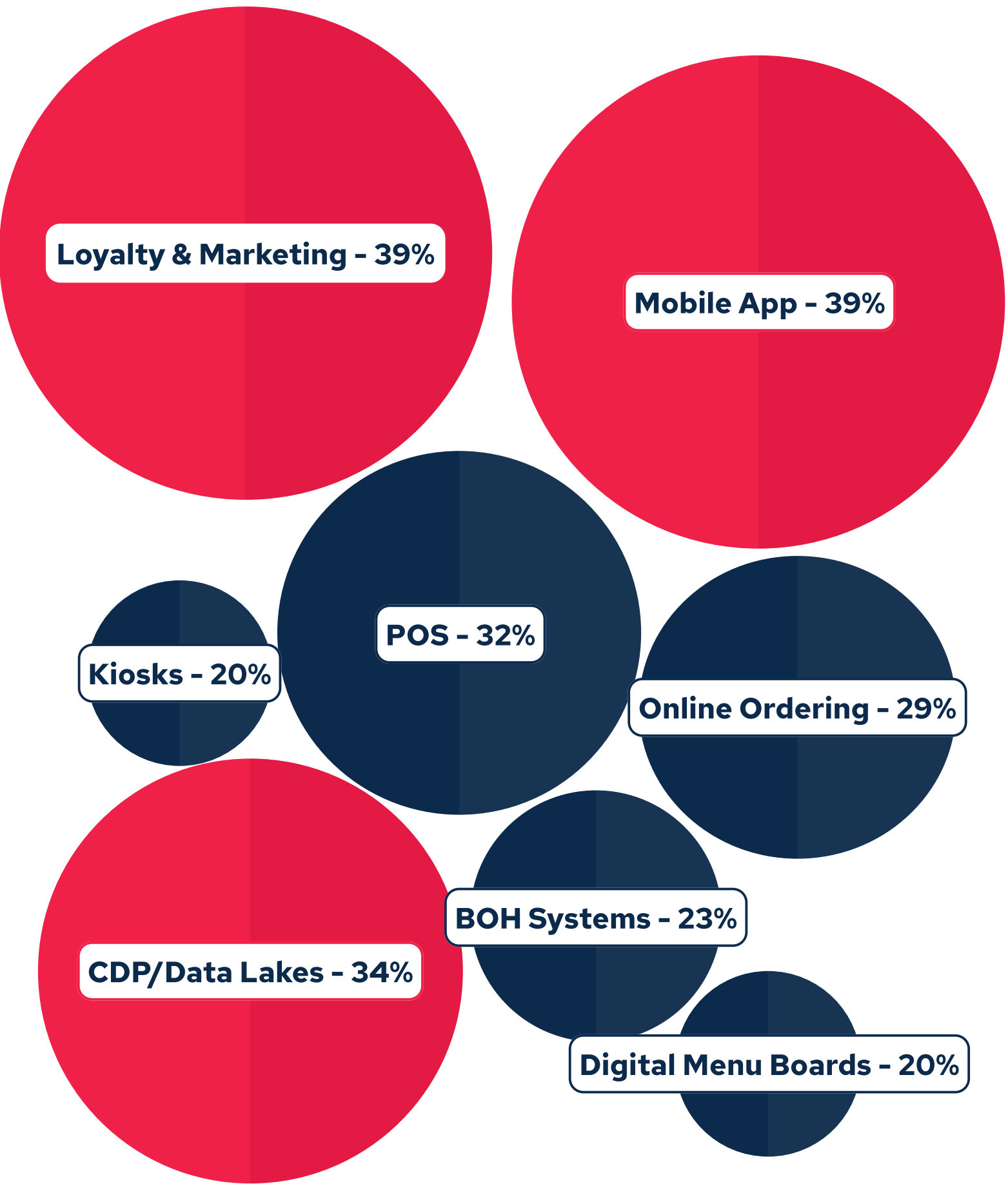
- 1 Data investments are up significantly
- 2 Loyalty 3.0 remains elusive
- 3 Unified data can be loyalty's savior



# Top Technology Investments: Direct Ordering & Data

The trend toward owning the guest relationship continues, with marketing & loyalty, mobile apps, and data as leading investment areas.

CDP and data investments, up 11%, are poised to outpace loyalty investments, down 8% YoY.



Top Technology Investment Areas



Data platforms take on new importance as loyalty has lost its way with a focus on the few—data can be its savior when the two are paired together. The result: improved guest lifetime value.

LOYALTY WITHOUT UNIFIED DATA WILL FAIL

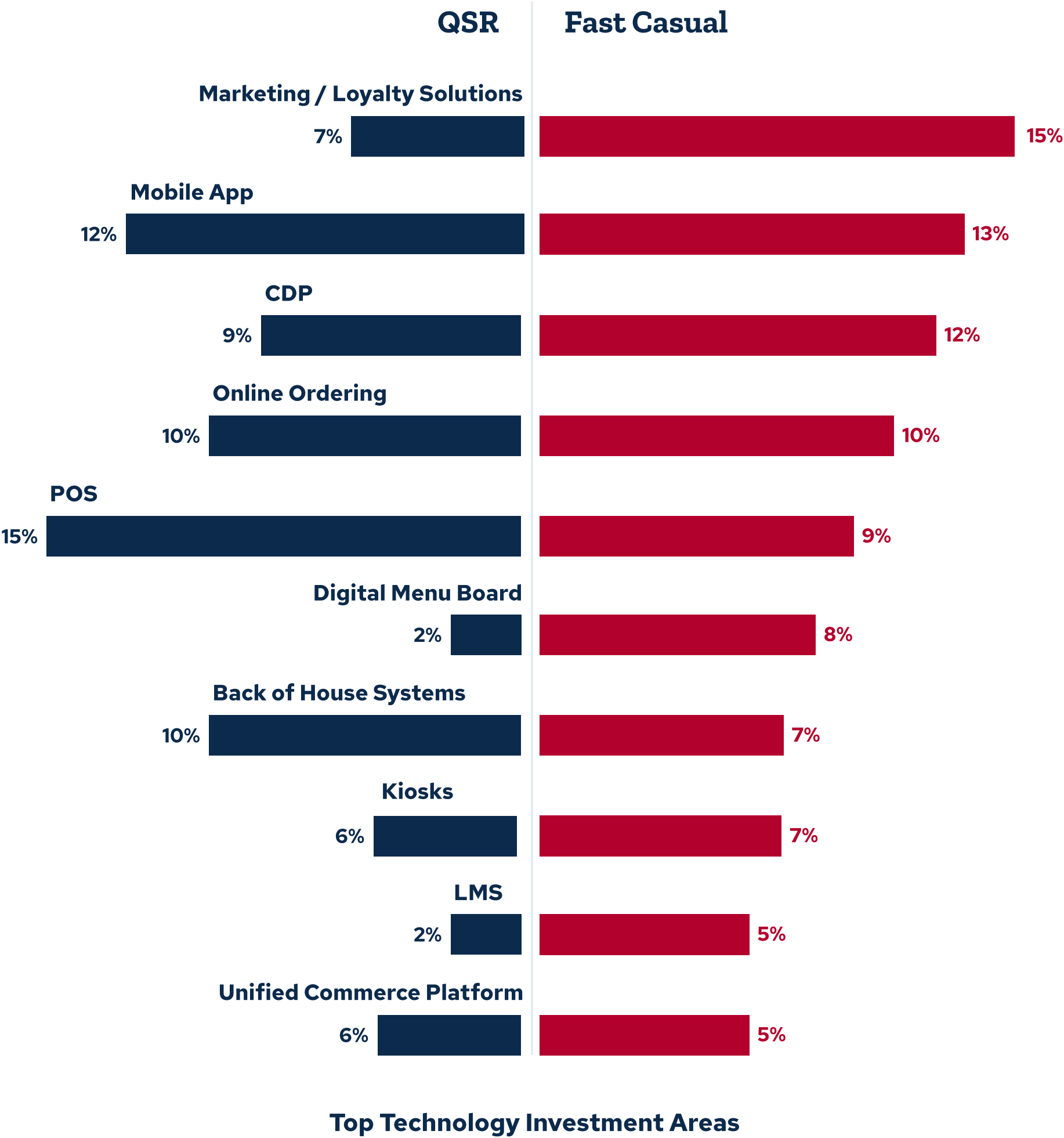
34%

**of brands** plan to invest  
in data platforms &  
strategies in 2025



# Restaurants Aim to Attract Guests with Loyalty & Apps

Fast Casual focused on direct guest relationship; QSR investing in efficient transactional systems.



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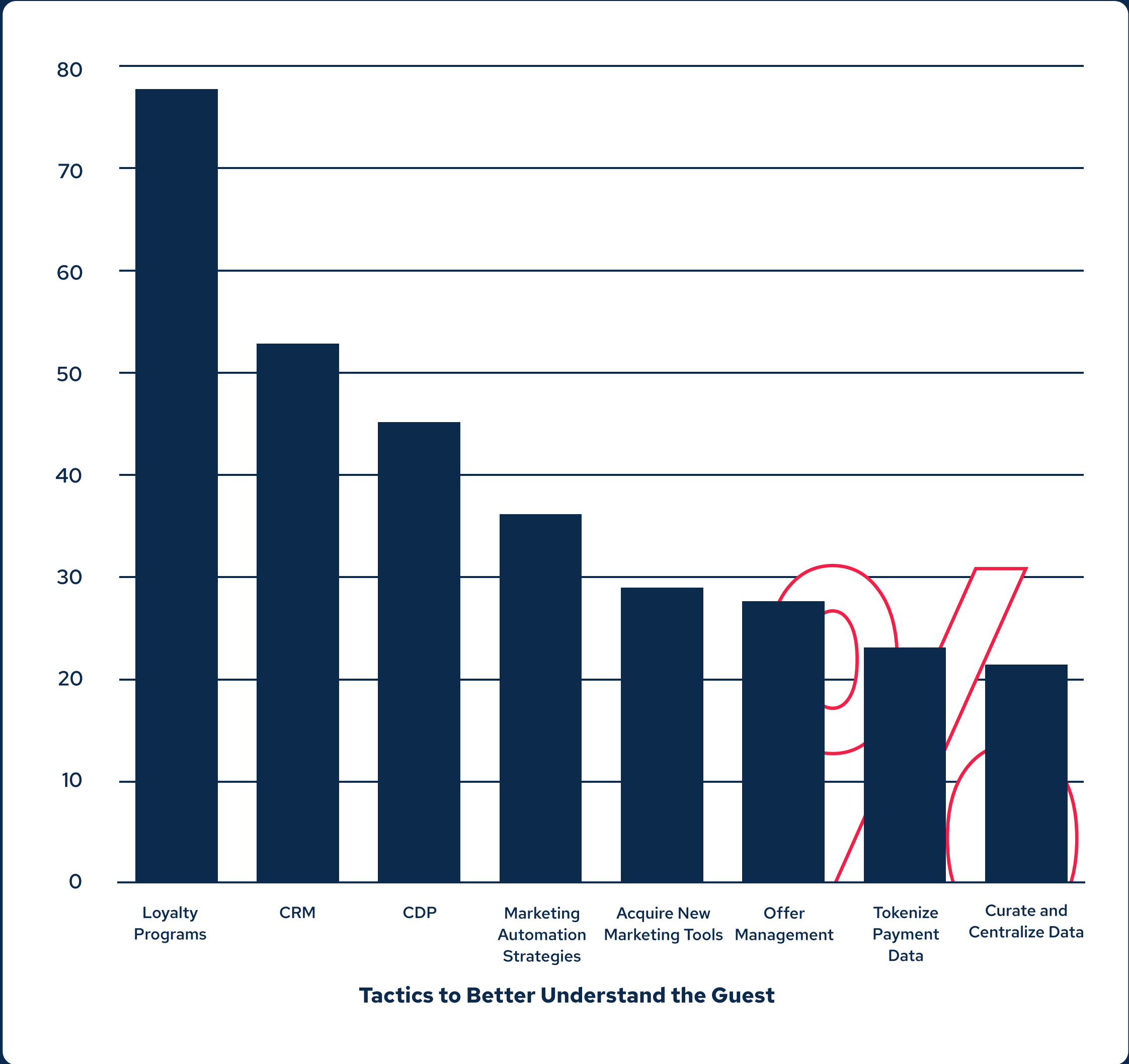
Top 3 investment areas for 2025 reinforce restaurants’ focus on winning back the guest, with QSRs prioritizing POS; Fast Casuals prioritizing marketing and loyalty solutions.



# Go Beyond Regulars

It's time for loyalty to broaden its horizons and capture the overall guest base.

Investments in CDPs and CRMs are rising, to drive loyalty program effectiveness. Loyalty could be a loss leader if not combined with data-driven strategies that improve customer acquisition and capture a larger pool of guests.



Traditional loyalty is now a non-differentiated strategy, but when paired with unified data platforms, has the power to target the many, personalize the experience, and drastically improve guest lifetime value.



This question sponsored by olo.

# Kiosk Surge Continues

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## KEY INSIGHTS

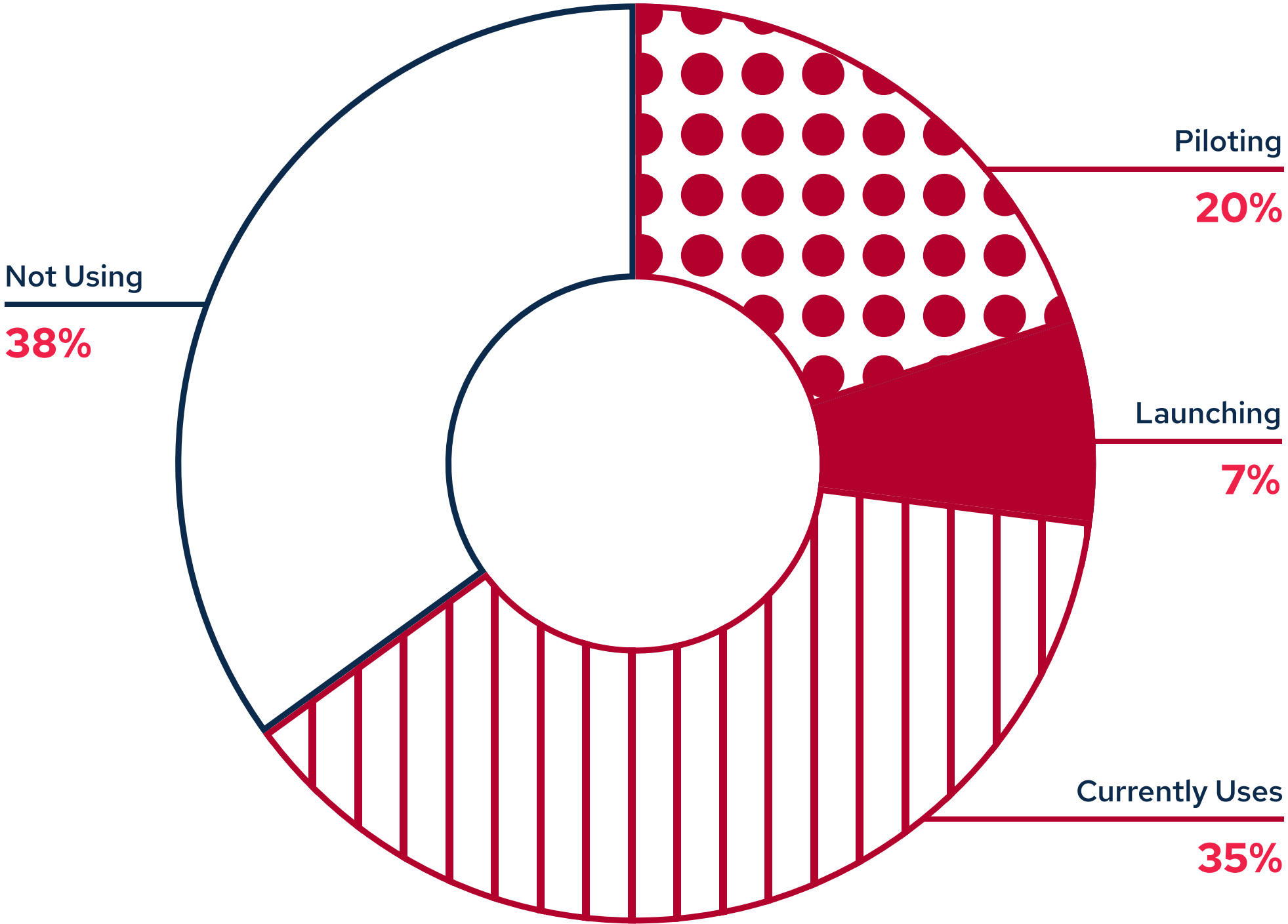
- 1 QSRs are "all in"
- 2 Barriers remain
- 3 ROI is untapped



# Kiosk Usage Soars

Operators are implementing kiosks to drive efficiency and ease labor pressures.

62% of brands embrace kiosks to help alleviate labor challenges and drive operational efficiencies. In 2023, 43% of brands planned to add kiosks.



Do You Plan to Use Kiosks in 2025?



Brands are seeking more effective ways to compete for direct engagement by offering low-friction ordering methods, like kiosk, that deliver high convenience and a more controlled brand experience.

62%

**of brands** said they are  
using or adding kiosks  
this year, all in service to  
balancing operations  
and labor challenges

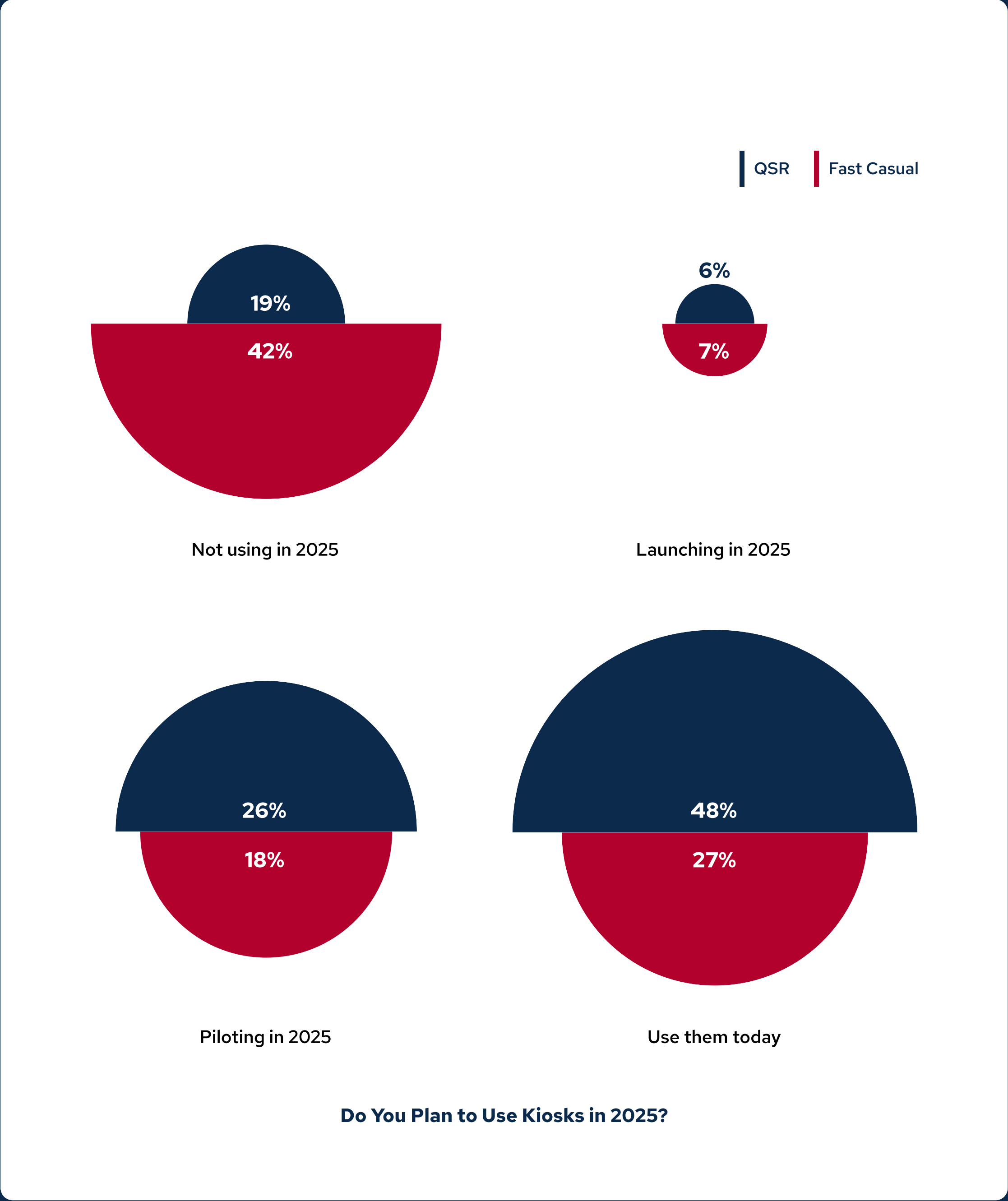




# QSRs Go All In on a Kiosk-Driven Future

Kiosk growth at QSR brands significantly outpaces the fast-casual segment, with 80% of QSRs and 52% of Fast Casuals implementing kiosks in-store.

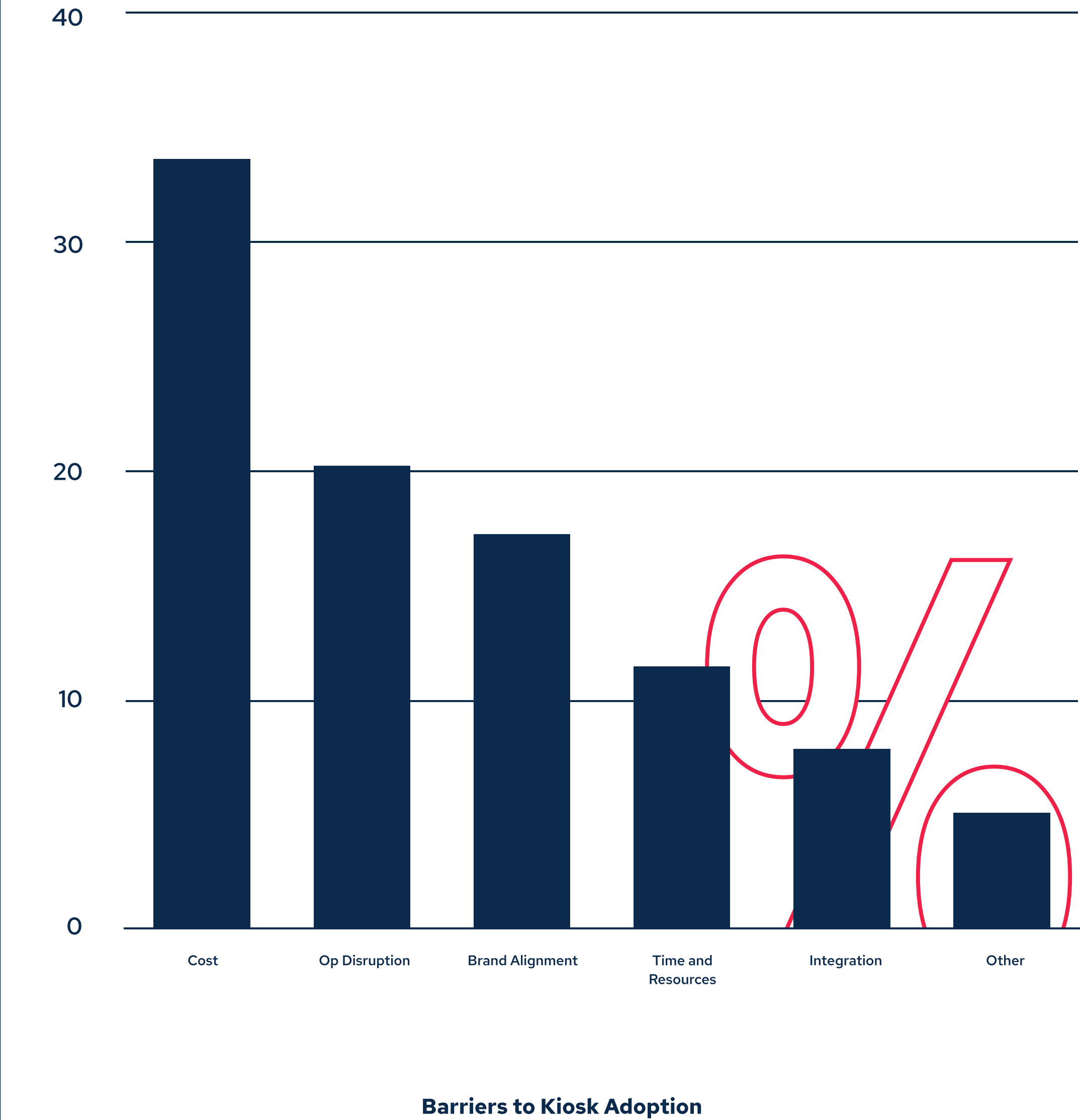
Data insights show a trend towards divergence of digital strategies between QSR and Fast Casual brands, with QSRs seeing a kiosk-driven future; and Fast Casuals moving more quickly to direct guest relationship management.



# Top Barriers to Kiosk Adoption: Cost, ROI & Disruption

Kiosks are widely deployed, but brands remain tentative on outcomes and ROI.

The future for kiosks will require a more intentional focus on revenue generation with strong promise for higher Average Order Volumes (AOVs) than other channels due to upsell features.



# Kitchen Innovation is The Next Efficiency Frontier

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## KEY INSIGHTS

- 1 Kitchens overdue for modern tech
- 2 Order accuracy challenges continue
- 3 Investments needed to improve speed, accuracy, throughput

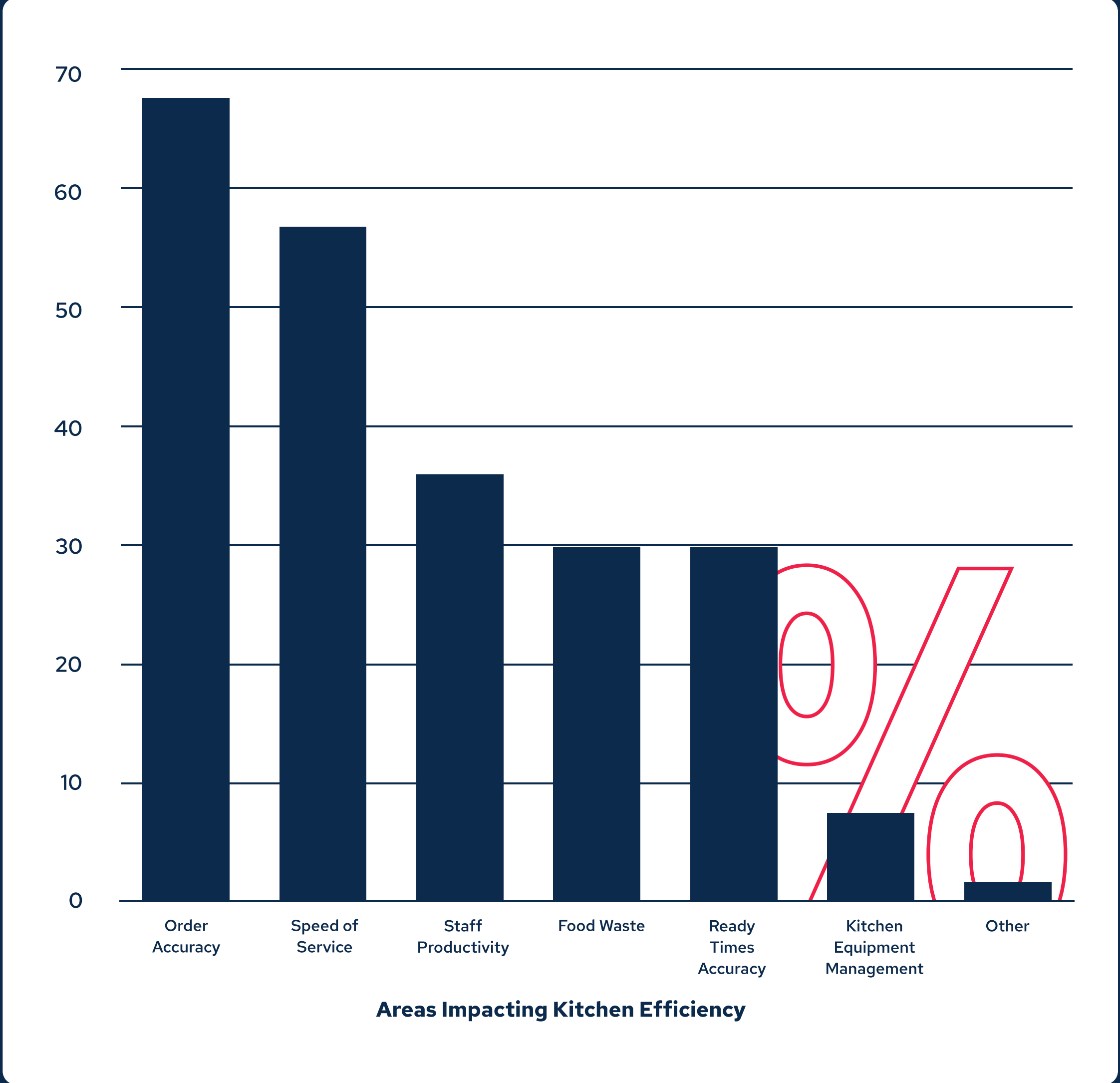


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# Kitchen Inefficiencies Impact Guest Experience, Tech Investments Can Help

Brands look to improve order accuracy, speed of service, and staff productivity.

Nearly 70% of enterprise restaurants report that order accuracy is the biggest efficiency challenge, followed by speed of service and staff productivity.



AI and unified platforms can improve order accuracy and kitchen inefficiencies, but restaurants must invest. Honoring and improving promised ready times will improve guest sentiment.

# 70%

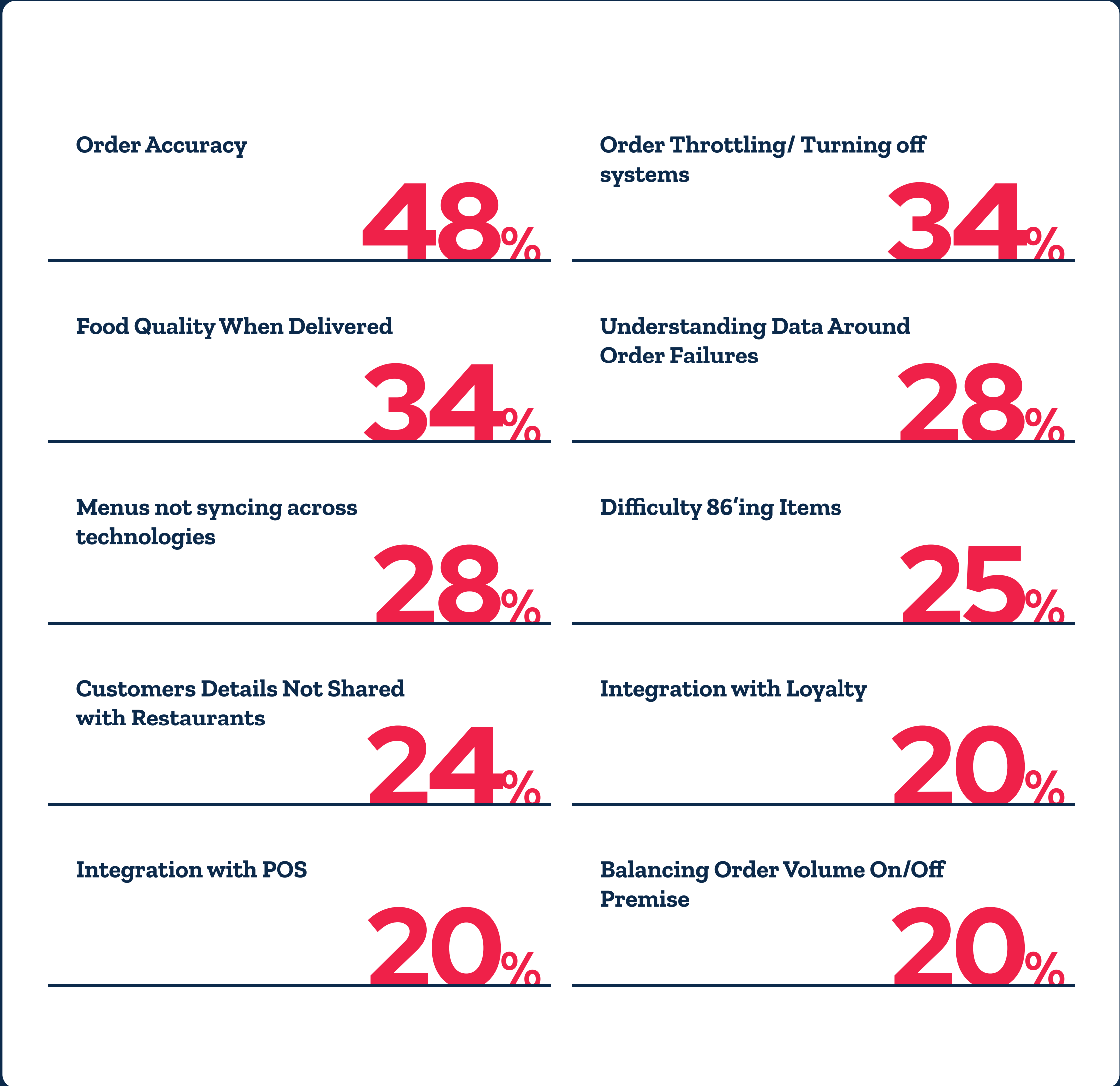
**of brands** said they are looking to improve order accuracy (up from 64% last year) as a means to stronger efficiencies



# Biggest Challenges with Digital Ordering

Order accuracy: digital’s Achilles’ heel.

Order accuracy continues to dampen the delight of digital guests. Other challenges like employees turning off online orders and food quality point to the need for unified systems and data for driving kitchen efficiencies.



# Digital Growth Stabilizes

6

## KEY INSIGHTS

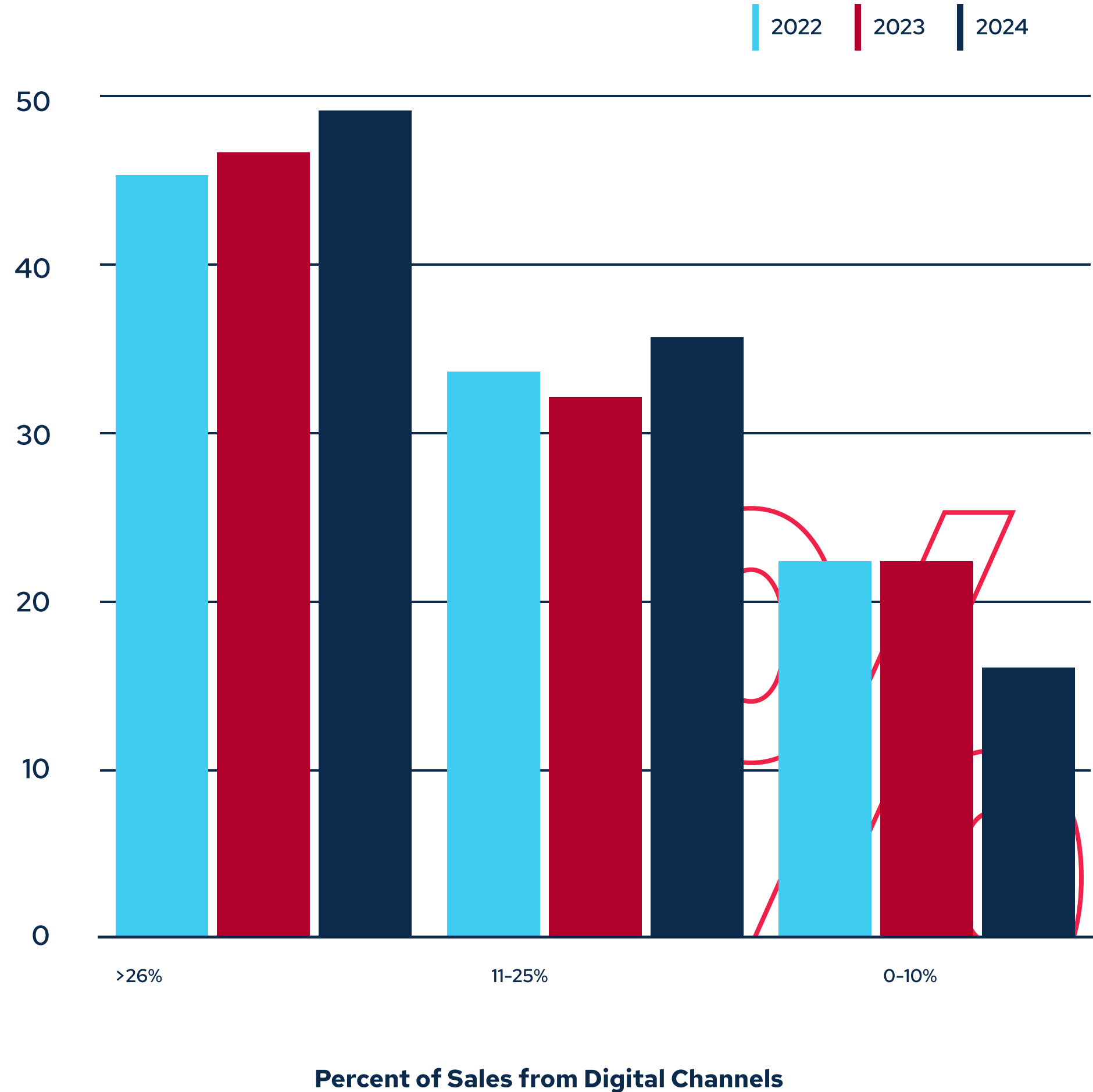
- 1 Half of brands have over 26% digital sales
- 2 The ordering channel mix is more predictable
- 3 Brands are trading up to higher percent of digital sales categories



# Digital Sales Mix Stabilizing

Digital and off-prem sales are stabilizing, with incremental growth in 2024.

The 3-year view of digital sales shows steady yet modest growth with a 4% increase since 2022. Incremental gains and a stable ordering mix means restaurants can finally focus on owning the direct guest relationship and improving unit level economics.



- Half of brands have over 25% digital sales
- 35% of brands have between 11-25% digital sales
- Fewer brands are landing in the 1-10% category and more brands are moving up to the 11-25 and 26+





# 10%

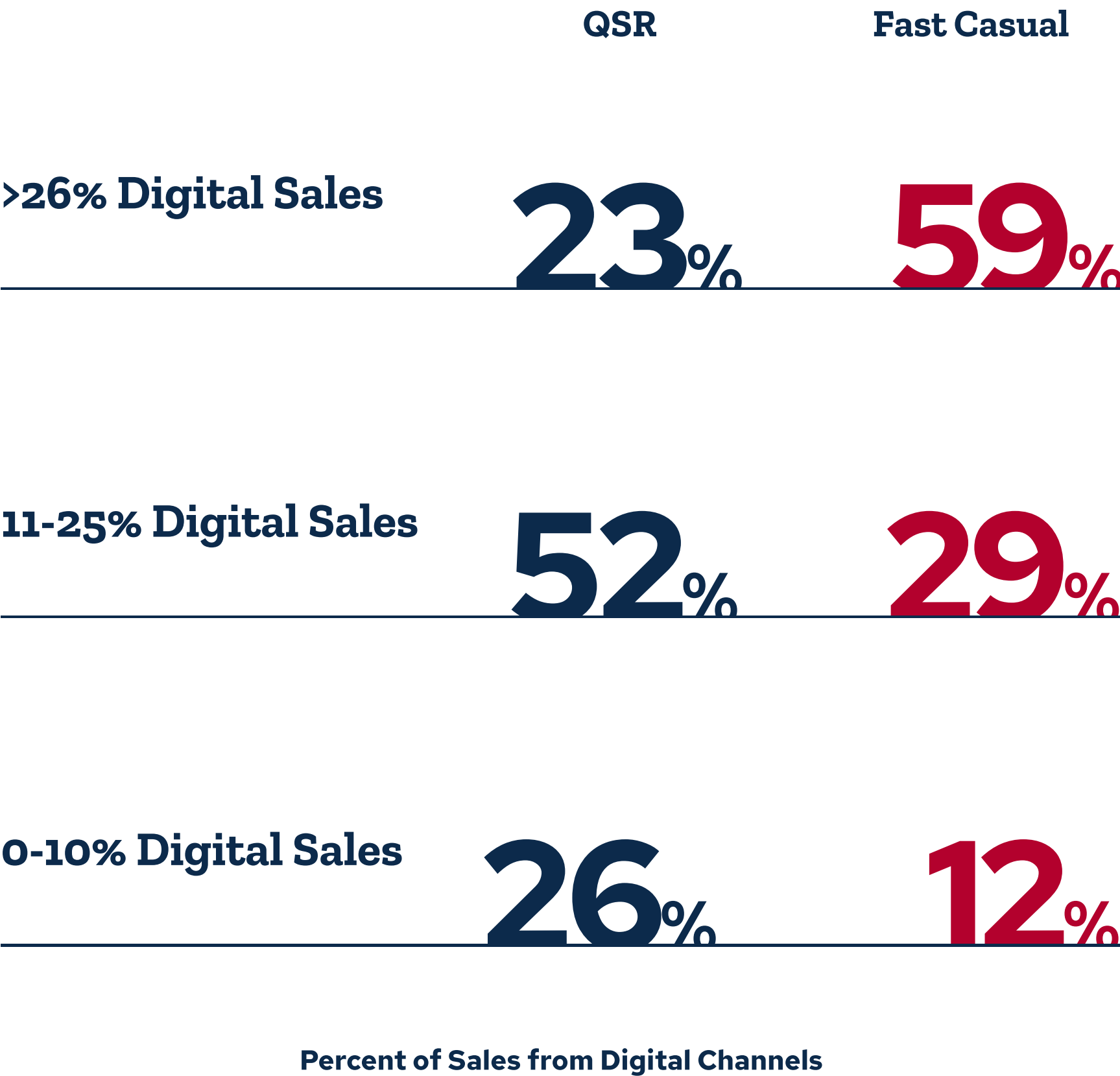
**of Fast Casuals have  
over 50% digital sales**



# Fast Casual Surpasses QSR in Digital Adoption

Fast casual digital adoption climbs.

Fast Casual brands have stronger digital adoption with 1 in 10 brands reporting 50%+ digital sales. 57% of Fast Casuals and 23% of QSRs have 26%+ digital sales.



Divergent digital models are emerging between the two segments, with drive-thru for QSRs making up for lower digital adoption.



THE FUTURE IS NOW

# Restaurant Growth Hinges on Winning Back the Guest & Unified Data

Data-first strategies will be a key differentiator in the quest to win back guests and boost loyalty.

To achieve operating and labor efficiencies, and win back the guest, restaurants need unified technology platforms.



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# Participant Profile

Survey methodology: Participation was strictly voluntary and limited to Fast Casual and QSR brands over 20 locations. Respondents completed an 18-question survey via online survey tool.

170 Enterprise Fast Casual  
and QSR Brands representing  
85,000 U.S. locations  
participated in the survey

170

All participating brands  
had 20 or more locations

20

Total restaurant locations  
represented is 85,000

85K

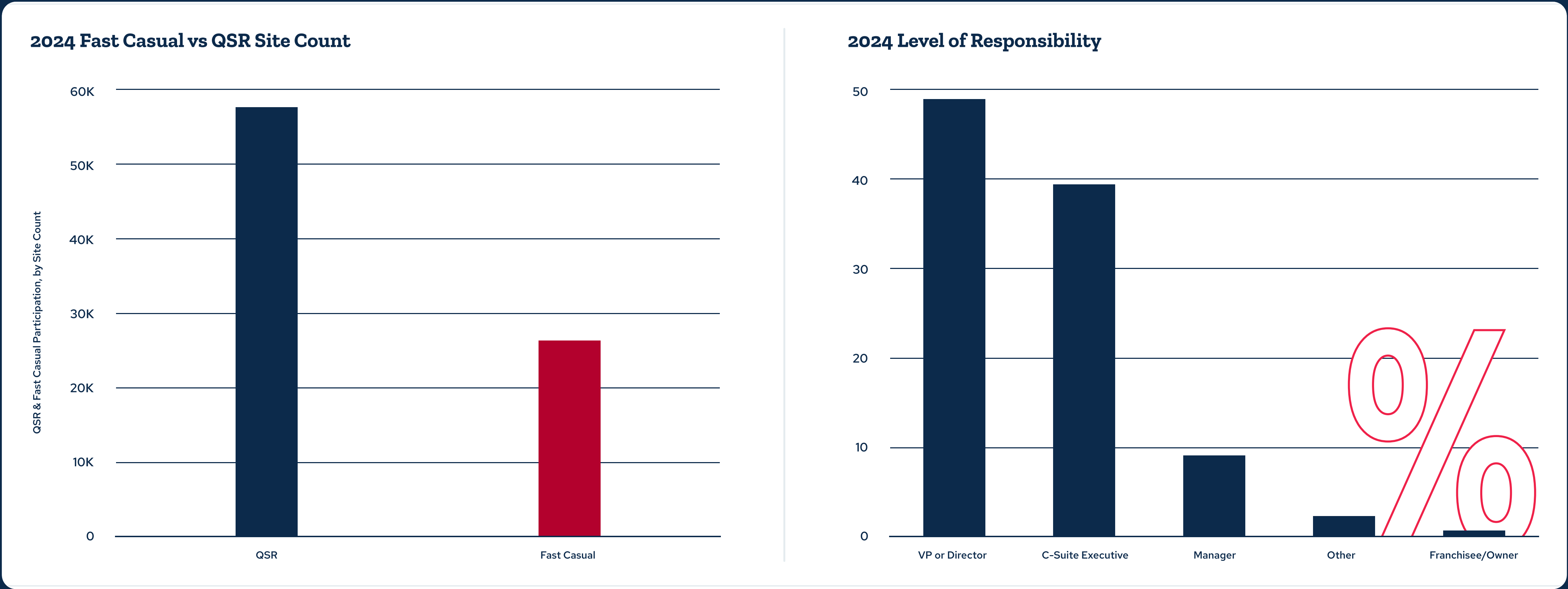
88% Participation from  
C-Suite, VP, Owners

88%



# Participant Profile & Demographics

Breakdown of brand participation: 74% Fast Casual and 26% QSR brands participated in the voluntary survey. By location count: 58,000 QSR and 26,000 Fast Casual brands participated.



# Special Thanks



Rapturous builds seamless digital experiences for multi-unit restaurant brands, integrating ordering and loyalty systems to drive revenue. Our solutions make ordering easier, enhance guest engagement, and maximize ROI.

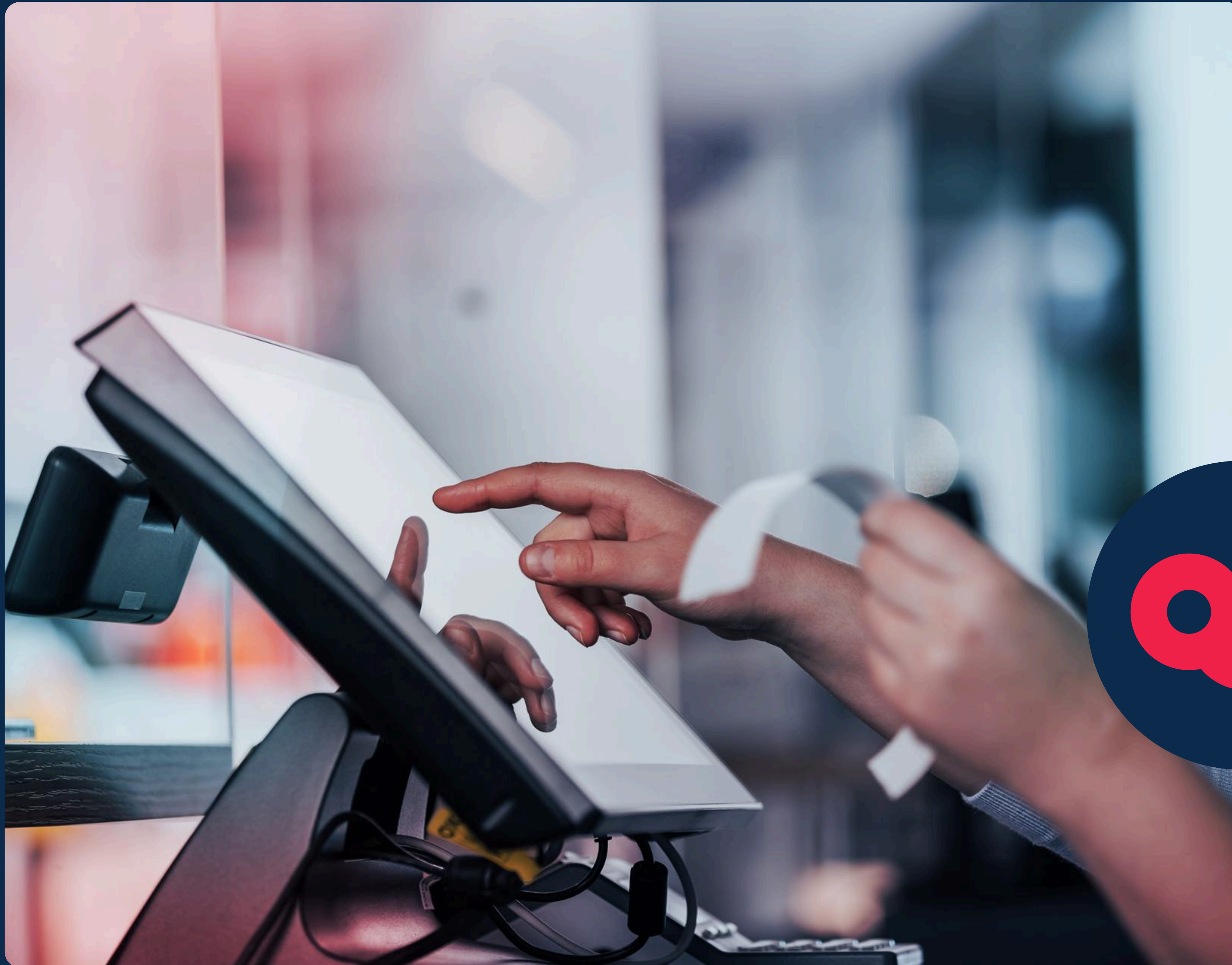
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We are deeply grateful to our charitable partners at Mercy Chefs for providing chef-prepared, nutritious meals to disaster victims, first responders, and communities in crisis. **Qu donated a meal for every survey completed.**

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Unified Commerce provides a stable foundation and trend-proof pathway for restaurants to thrive beyond today and into whatever comes tomorrow.



#### **CONTACT US**

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your expectations.  
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