The 2nd Annual

State of Digital

For Enterprise Restaurants

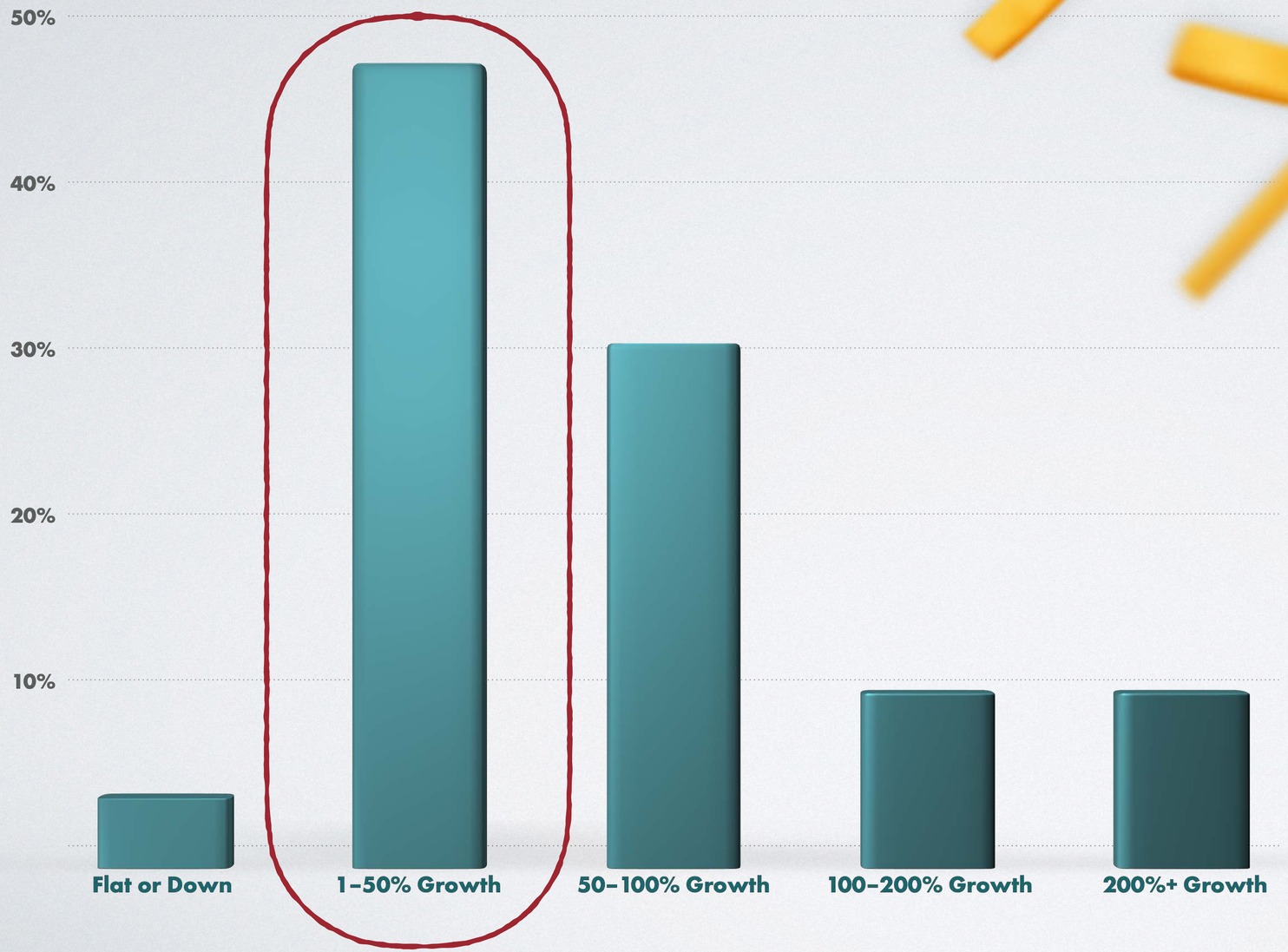
A Summary of

2020 Sales Performance and 2021 Digital Priorities

As reported by 80 leading Fast Casual and Quick Service Brands

2020
Digital Performance

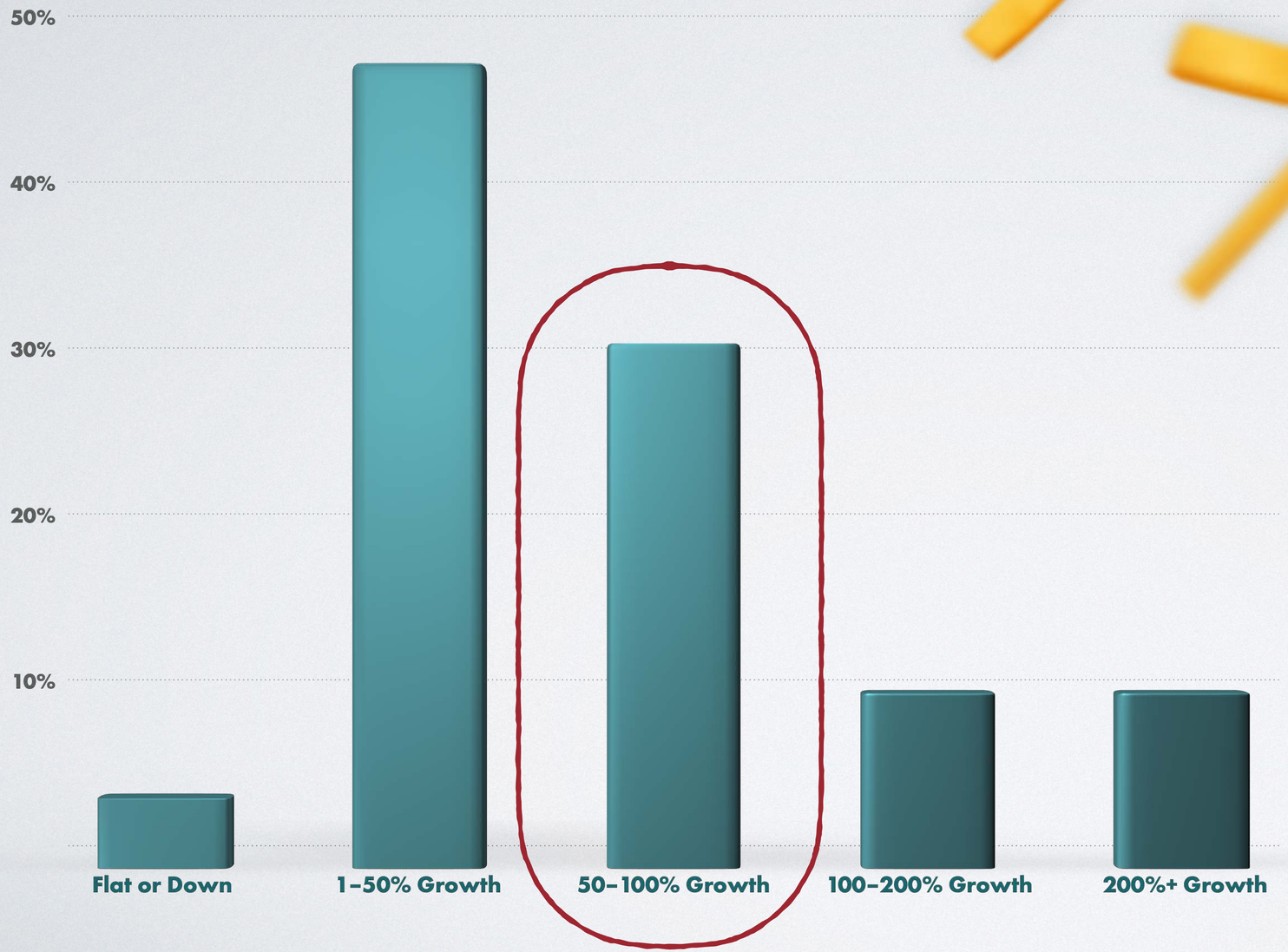
How Did You Grow?



Almost half of participating brands reported digital sales growth between 1 to 50%

Includes all digital ordering channels:
online, mobile, curbside, and delivery

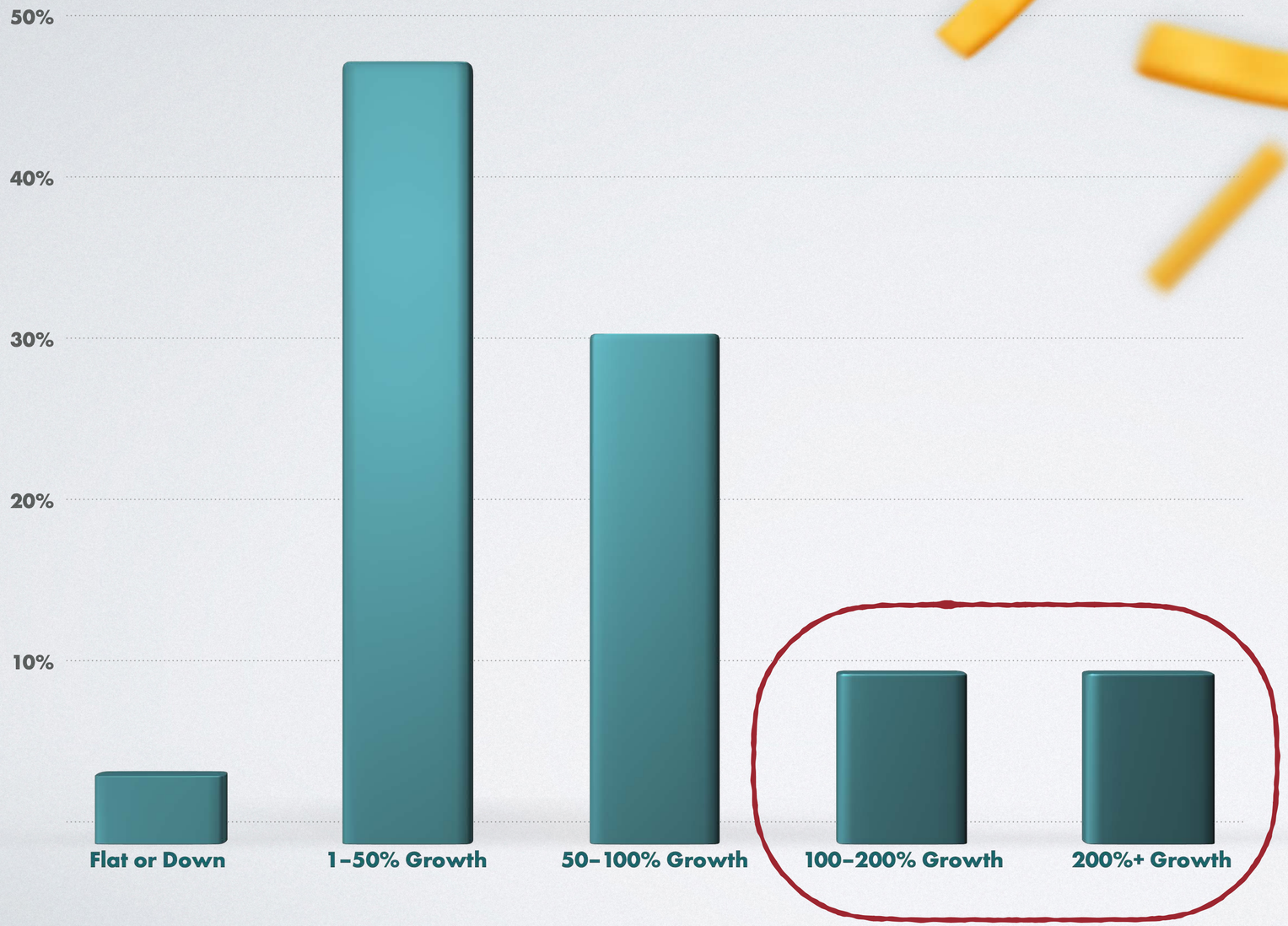
How Did You Grow?



30% of brands cited between 50–100% sales growth

Includes all digital ordering channels:
online, mobile, curbside, and delivery

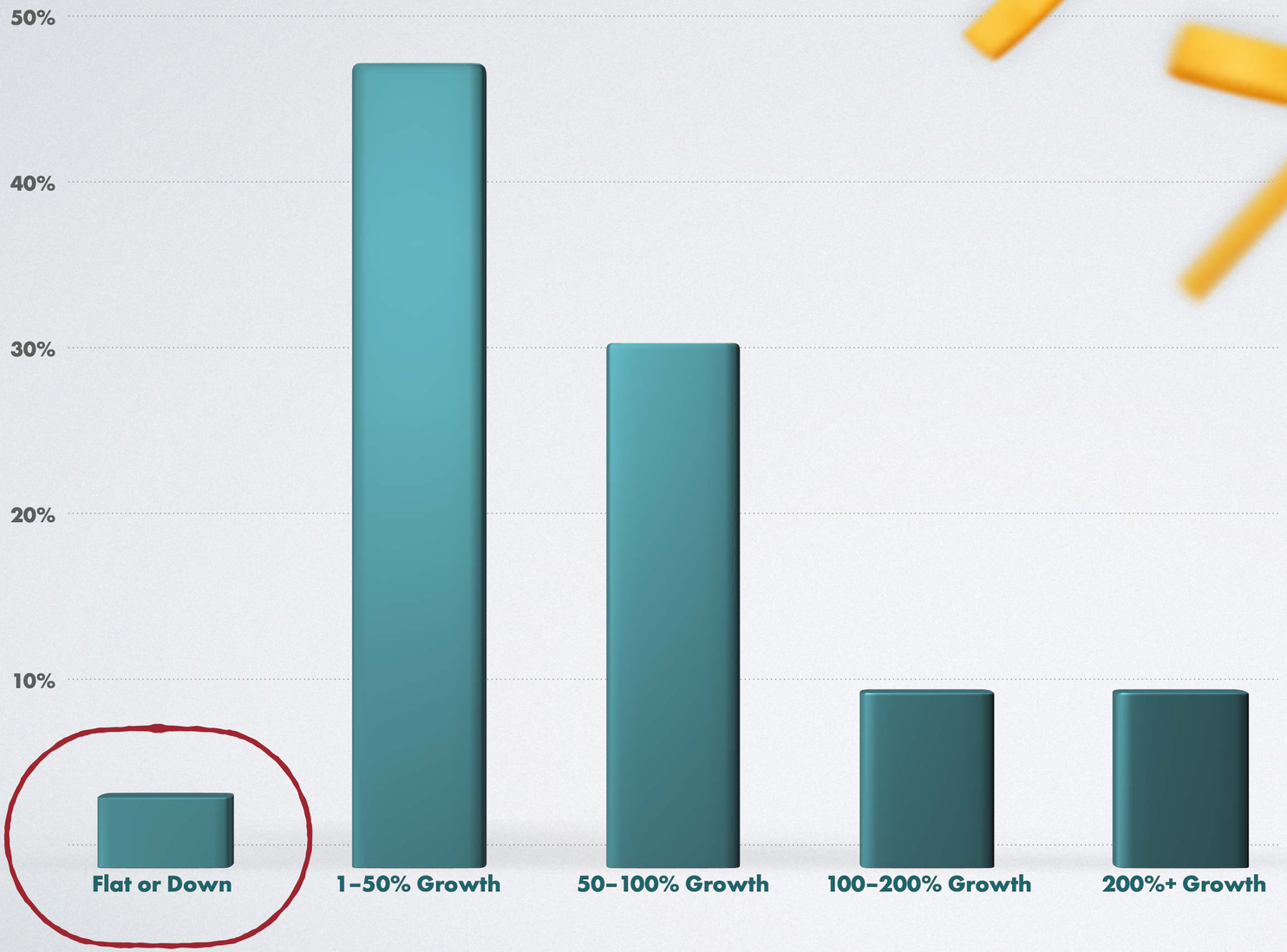
How Did You Grow?



20% of brands reported over 100% digital sales growth

Includes all digital ordering channels:
online, mobile, curbside, and delivery

How Did You Grow?



5% of brands were flat or down in 2020

Includes all digital ordering channels:
online, mobile, curbside, and delivery

Digital Sales Growth Favored QSRs, Chicken, Pizza & Asian Cuisines

100–200% Sales Growth

Pizza
Chicken
Asian

50%–100% Sales Growth

Mexican
Sandwiches/Subs
Burgers
Coffee
QSR Chicken

1–50% Sales Growth

Mediterranean
Sandwiches
BBQ
Salads

Top-Performing Pandemic Strategies

Digital Media, Promotions & LTOs, and Family Meals were Top 3 pandemic performing strategies

Brands also made big waves with **charitable efforts** in local communities and with creative **meal kits** offers

2021
Digital Priorities

Digital Priorities

The Big 2021 Mandate: Consolidate Systems

Single ordering platform across all channels

82%

said very important or mission critical

One vendor/system for omni-channel ordering and menu management

64%

said very important or mission critical

Brands overwhelmingly agree that a single ordering platform for their increasingly omni-channel world is paramount to success.

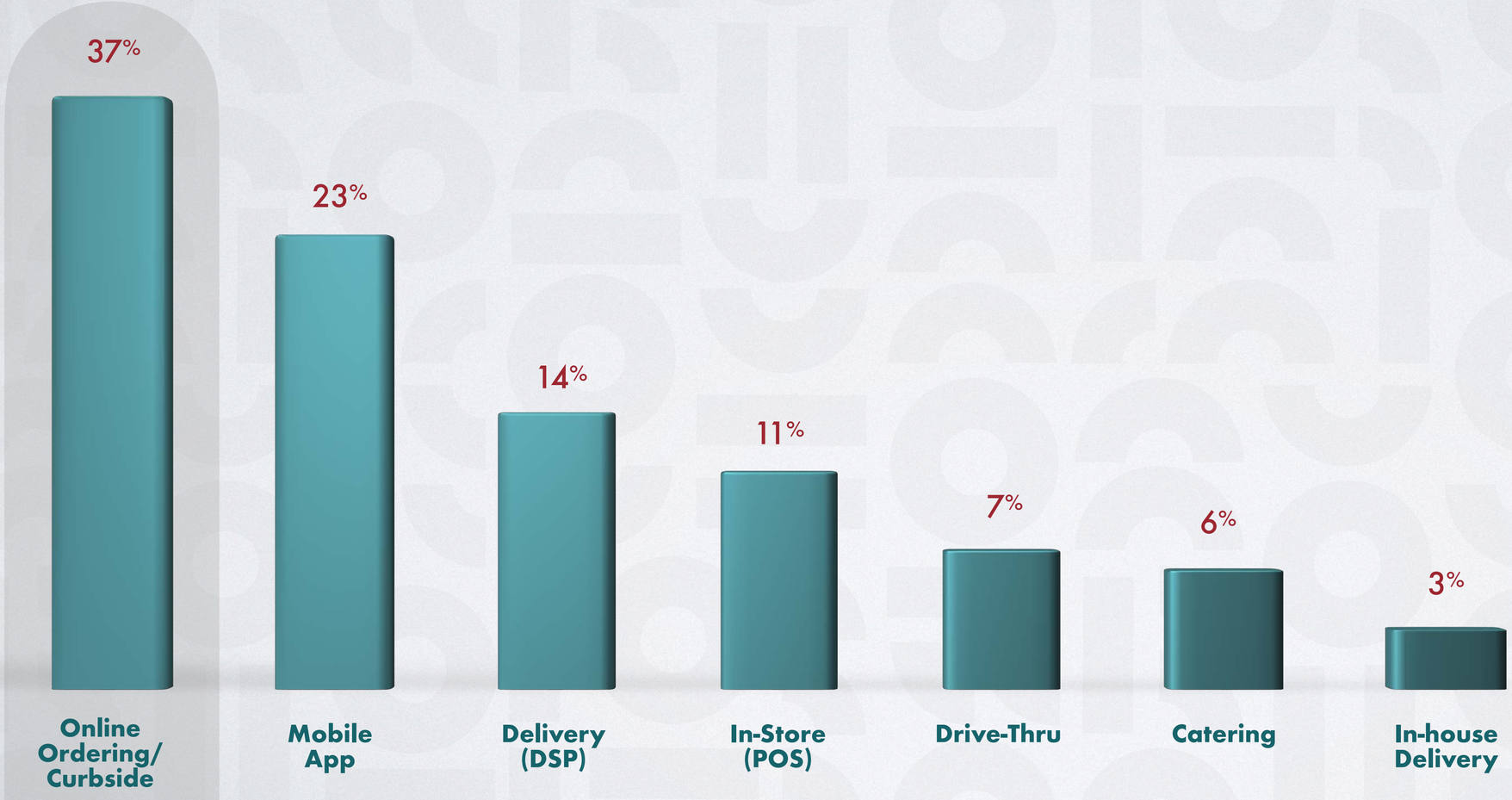
Once again... Operations team members voted the strongest for a single ordering platform (87%); followed by Marketing (78%) and IT (73%).

Digital Priorities

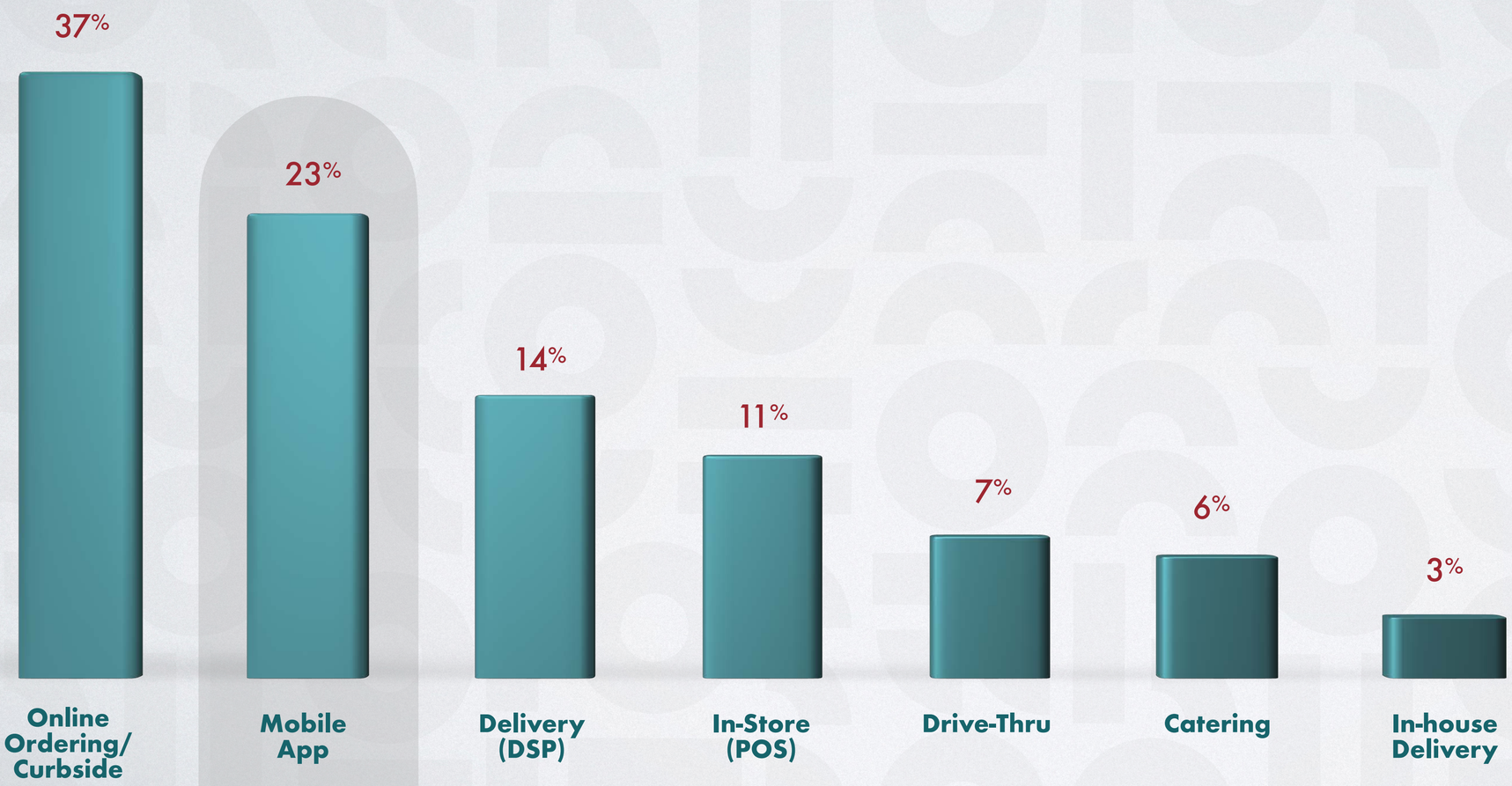
63% of brands will upgrade some part of their digital ecosystem in 2021

Respondents noted upgrades to their digital ecosystem would span from **mobile, apps, and loyalty to contactless payments, digital menu boards, CRM, and AI-based systems.**

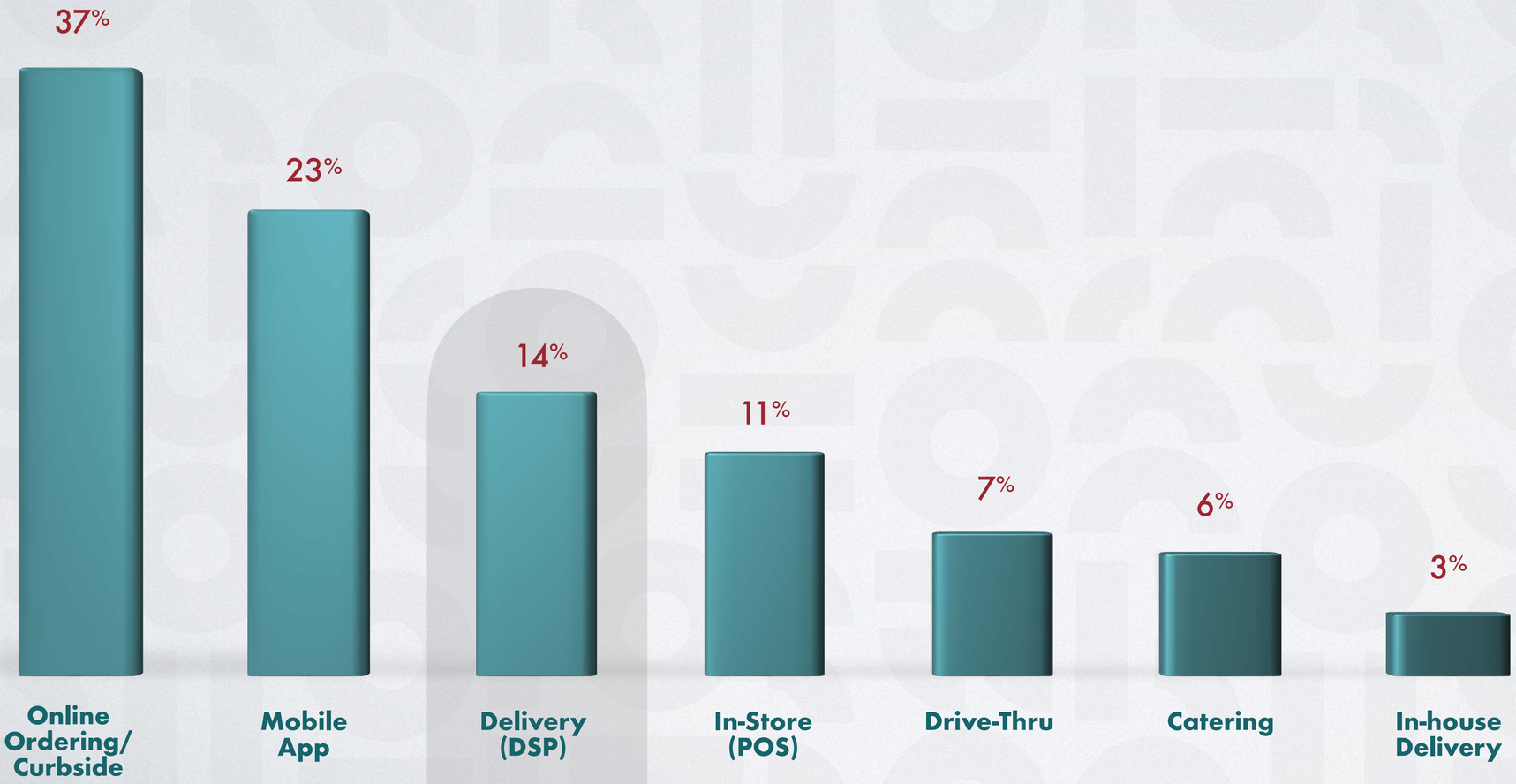
The #1 Digital Priority is (still) Online Ordering



...followed by Mobile Apps

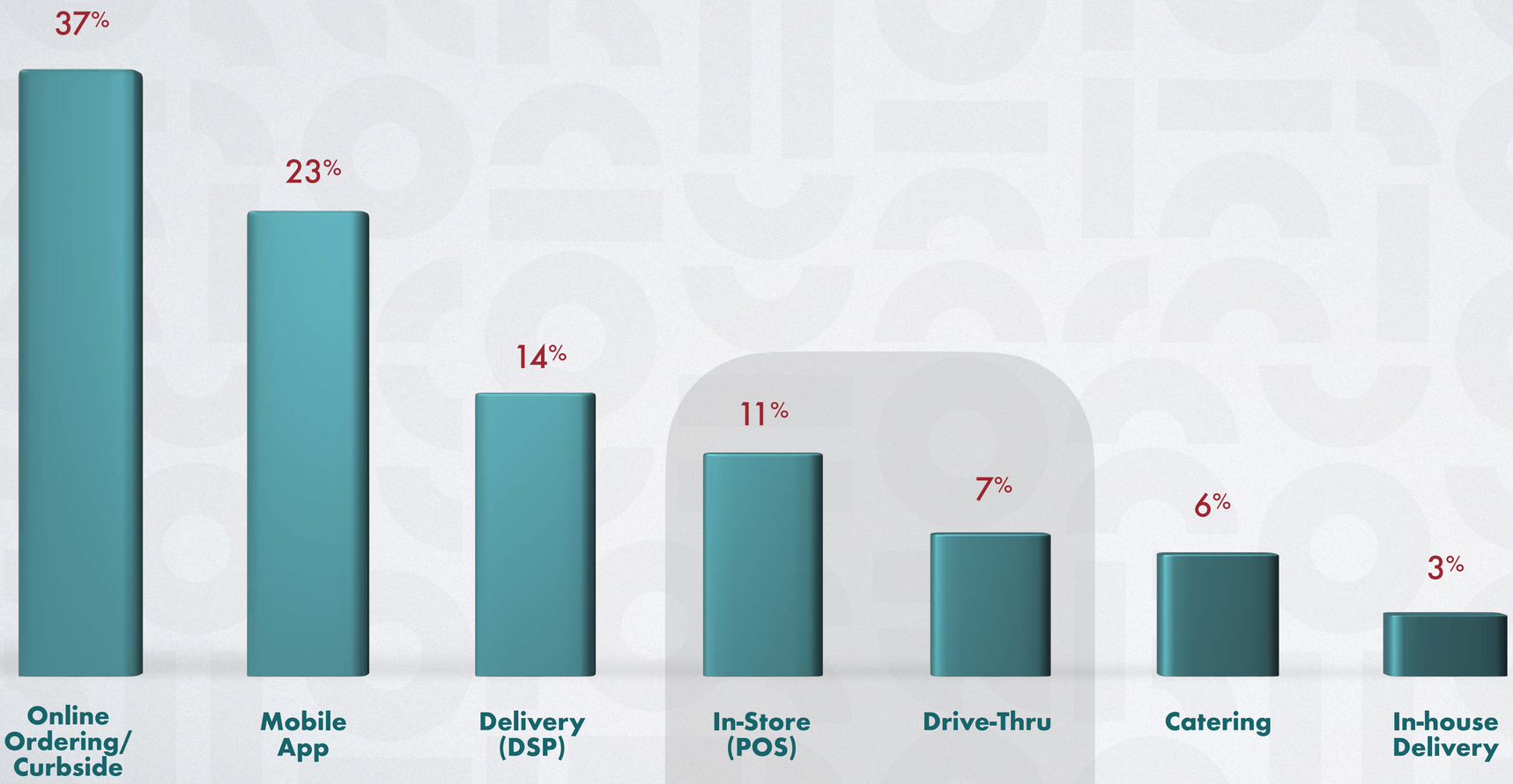


...then Third-Party Delivery Services



Digital Priorities

...and In-Store POS & Drive-Thru.



Continued focus on Online Ordering not surprising given its ability to drive sales in a pandemic environment.

In 2019, 75% cited Online Ordering as the #1 priority.

Visit QuBeyond.com for info

Digital Priorities

All Functional Roles Agree: Online Ordering is King, but Ops Says POS is Queen

IT

1. **Online/Curb**
2. Drive-Thru
3. POS
4. Mobile App

IT prioritized Drive-Thru & POS over the App

Operations

1. POS
2. **Online/Curb**
3. Mobile App
4. Drive-Thru

Operations selected POS as #1 priority indicating their current struggle to support many different systems across ordering channels

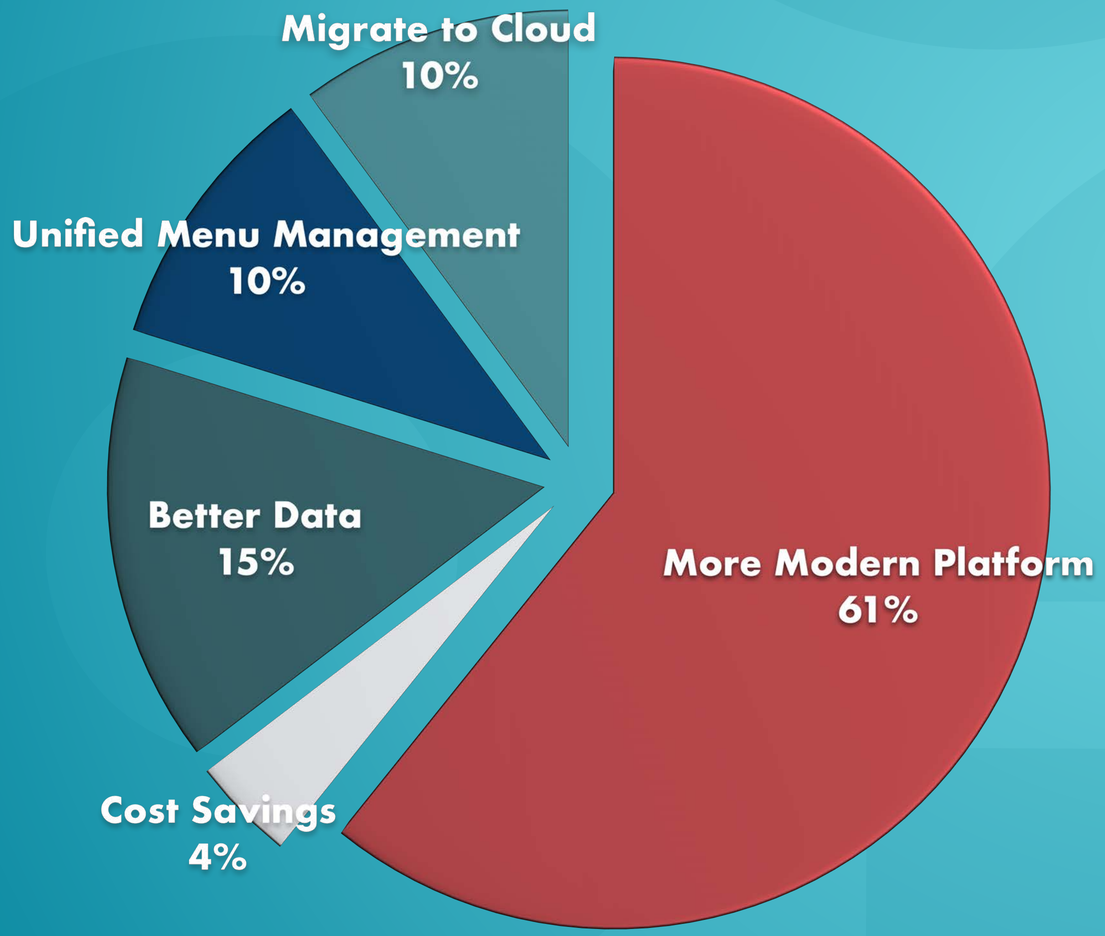
Marketing

1. **Online/Curb**
2. Mobile App
3. Drive-Thru
4. DSP

Marketing prioritized App & DSPs

Digital Priorities

More Modern POS Platforms are Heavily Favored



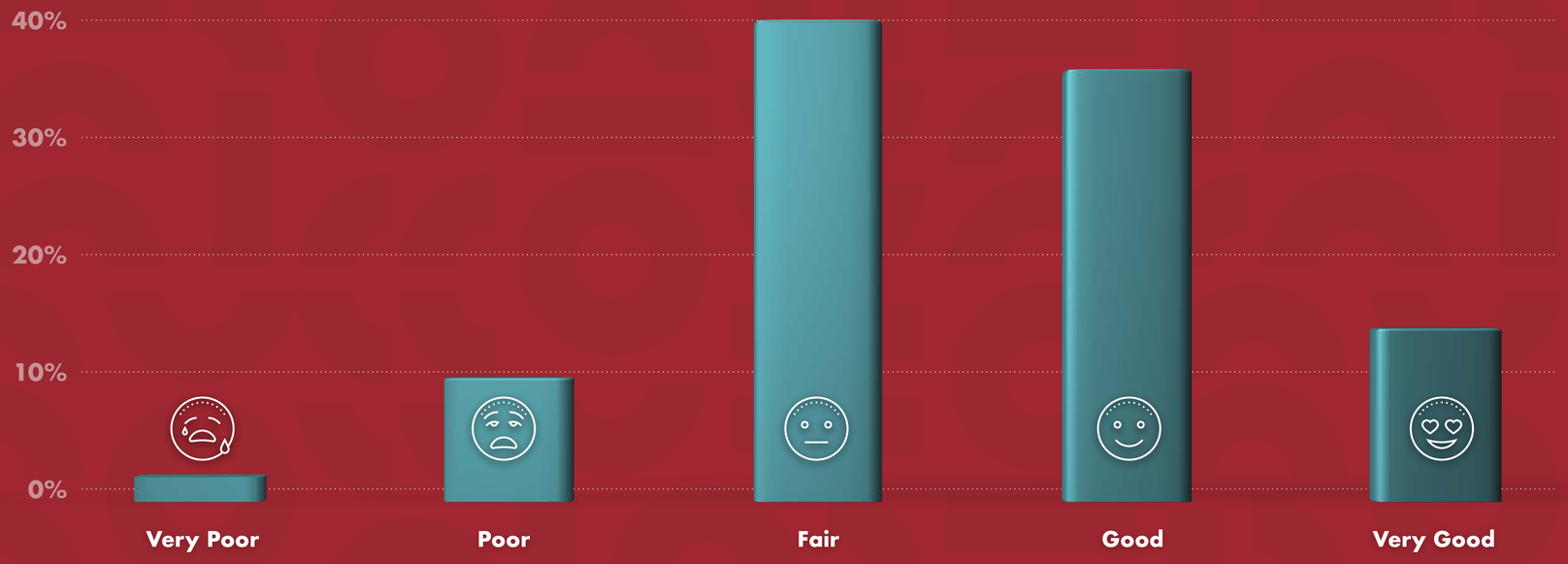
Almost two-thirds of respondents said that a more modern platform for future growth was the main reason for upgrading POS.

Less than 5% cited **"Cost Savings"** as the reason for needing to update their POS.

Digital Priorities

Over Half of Brands Say their Tech Stack is "Not Good"

More than half of respondents (53%) rated their tech stack as either **Very Poor, Poor, or Fair** in its ability to **scale and support omni-channel ordering efficiencies.**



53% VERY POOR, POOR, FAIR

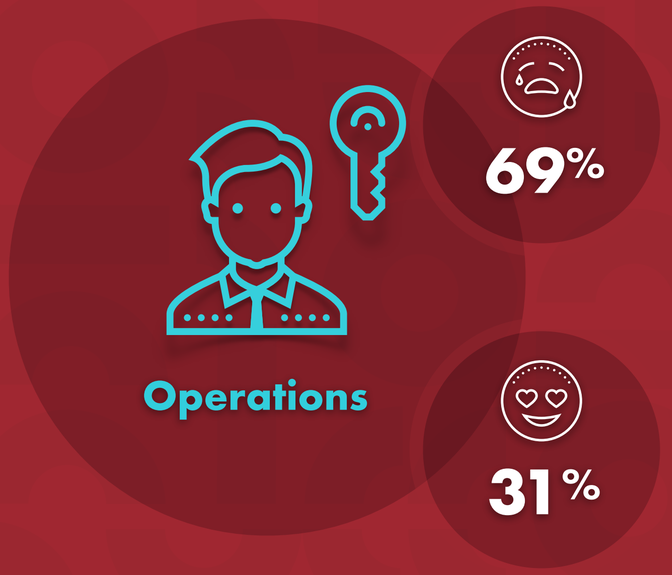
35% GOOD

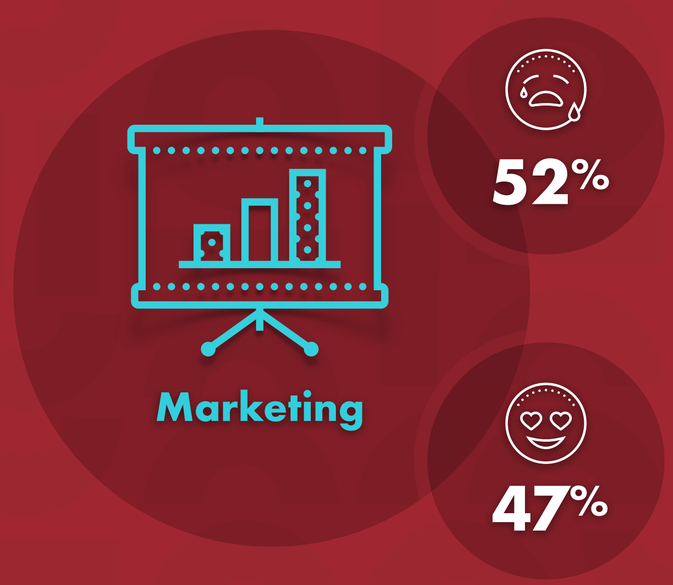
13% VERY GOOD

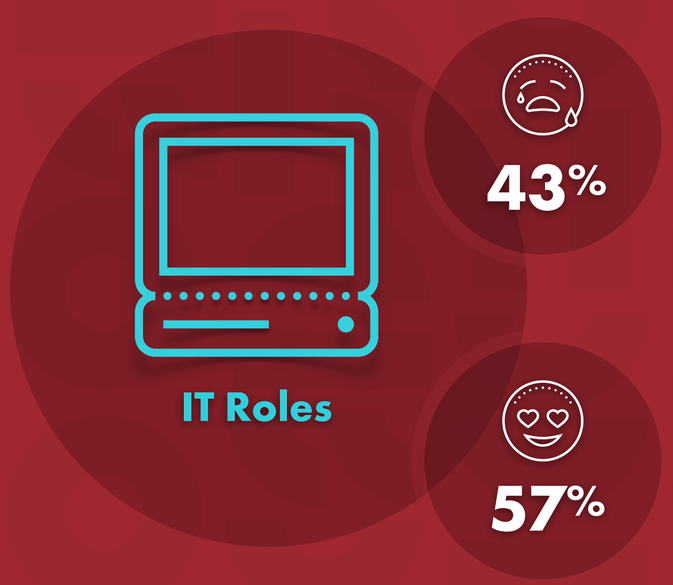
With at least **60% of enterprise restaurant brands still operating legacy or first-get cloud POS systems,** these ratings illustrate why it's **so hard for brands to transform digitally.**

Operations is the Harshest Critic

Nearly 70% of Ops responders rated their Enterprise Tech Stack as **Very Poor, Poor, or Fair**; followed by Marketing (52%) and IT (43%).

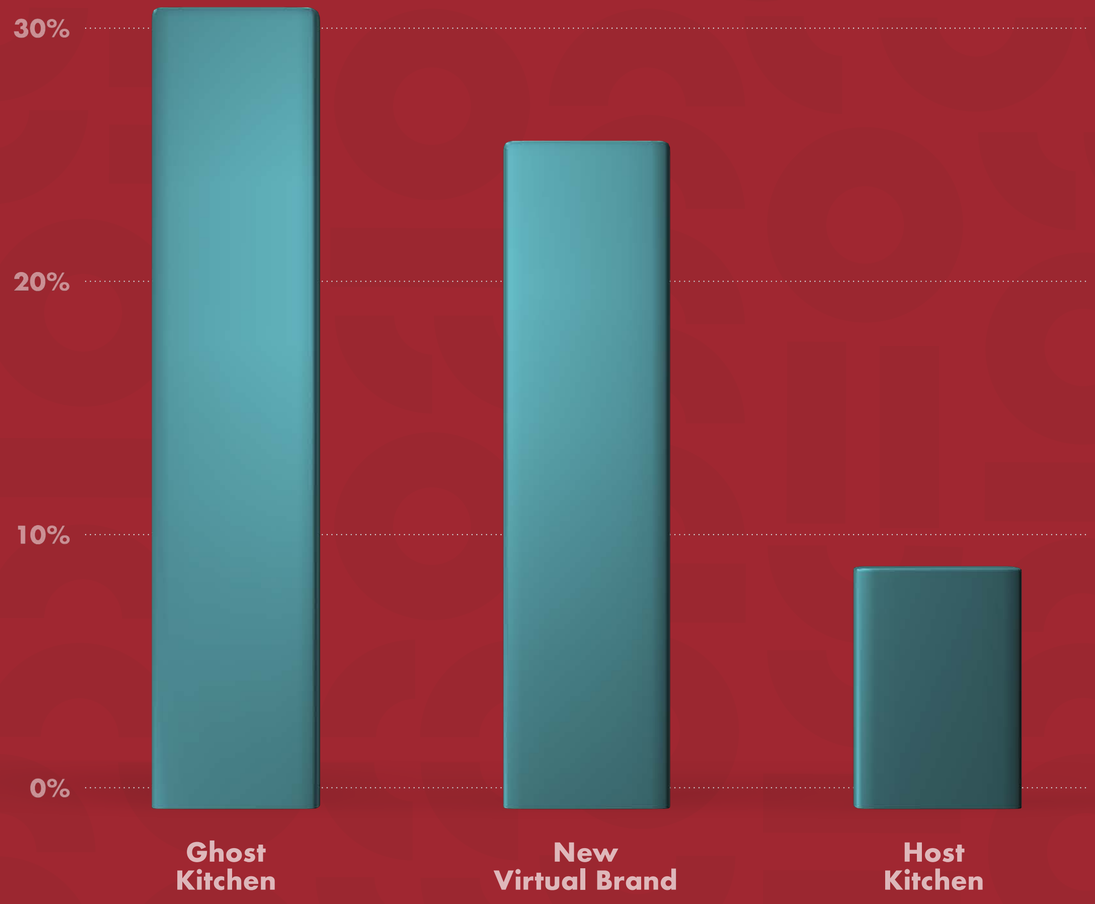






Digital Priorities

Carpe Diem: 2021 is the Year of the Virtual Concept & Kitchen



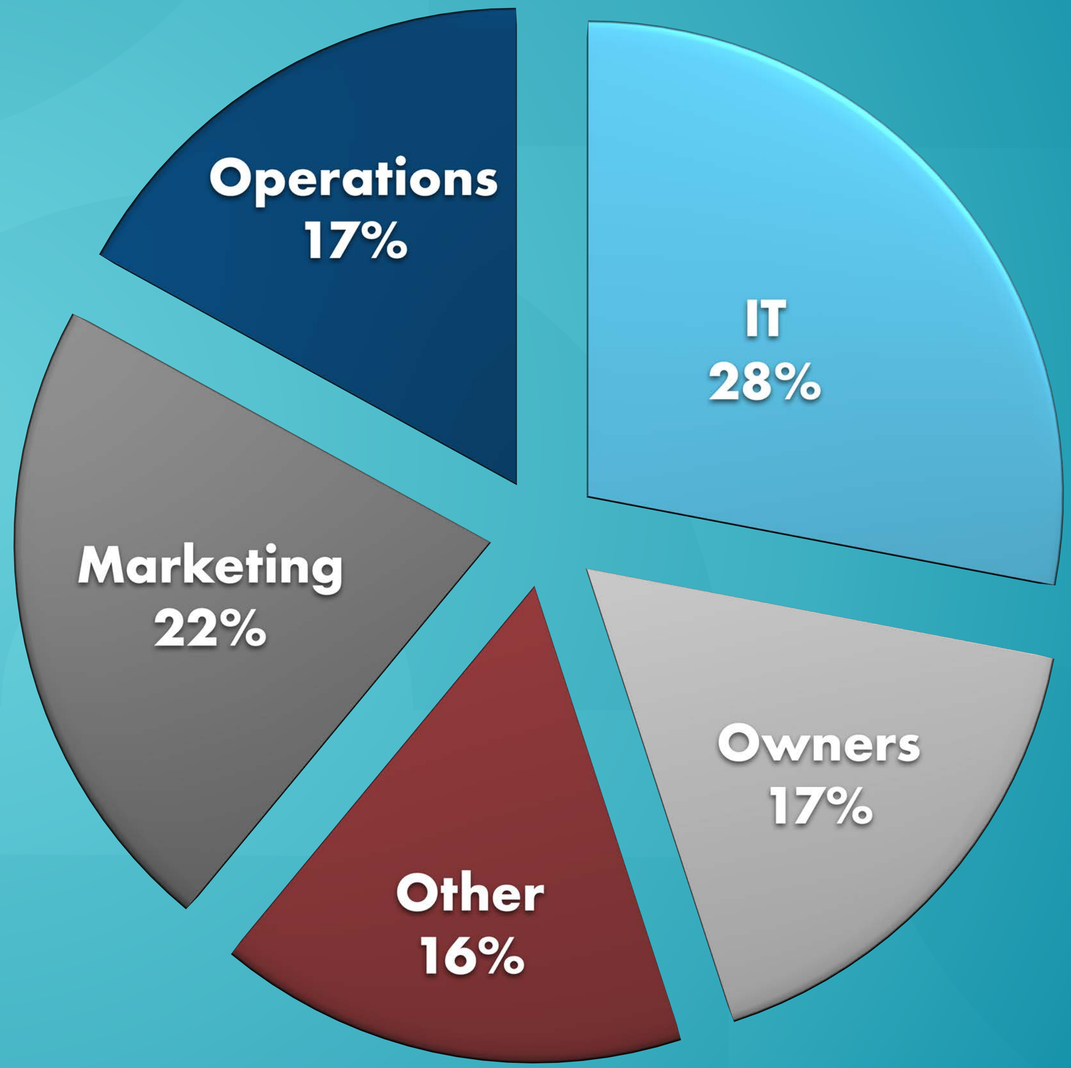
Almost half (47%) of brands said they're planning to launch a **new virtual kitchen concept**—with ghost kitchens being the most popular, followed by virtual brands and host kitchens.

Who Participated?
Respondent Profile

103 respondents from 80 unique brands

(25+ locations)

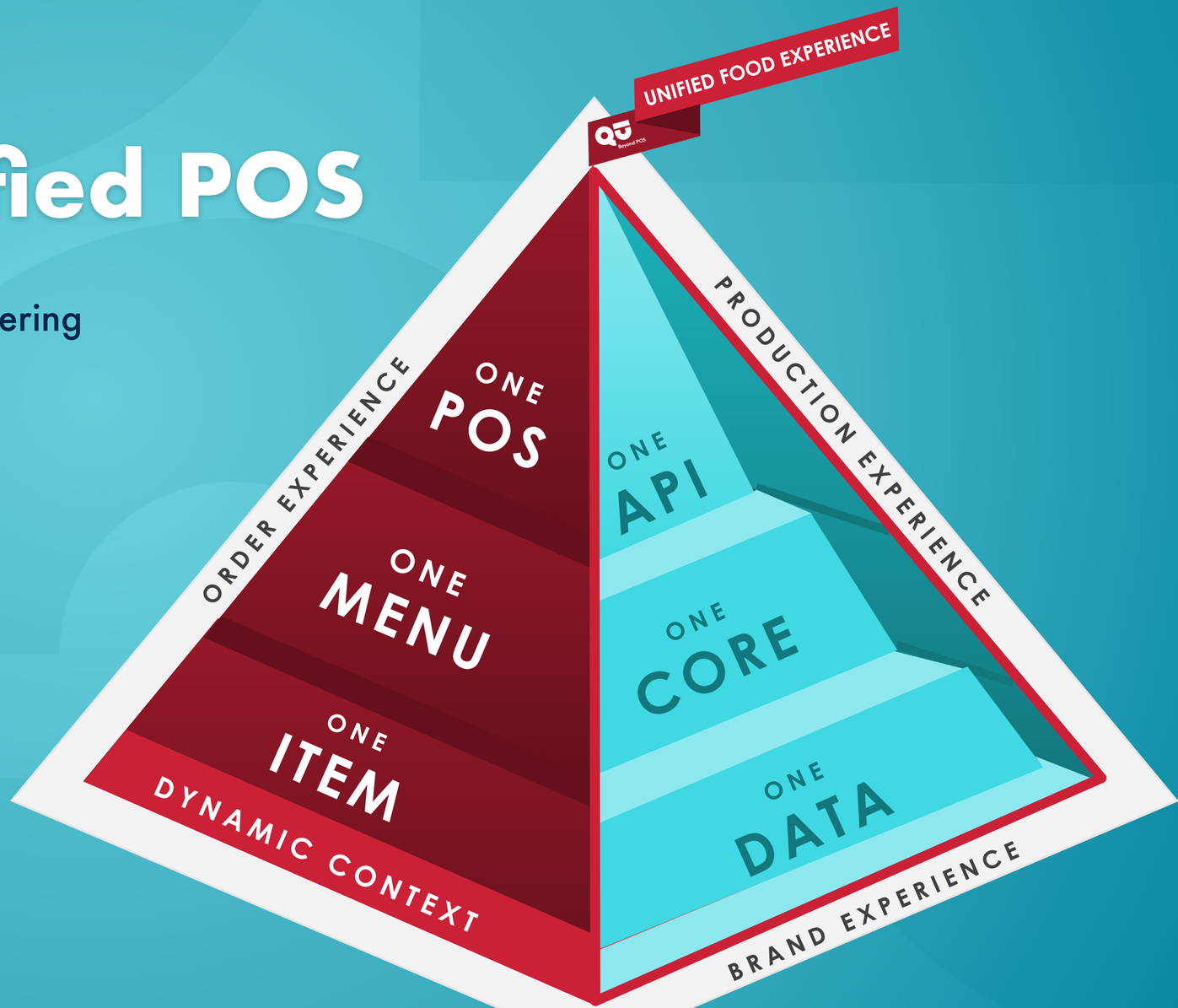
72%
VP-level or above



Join Qu in Our Quest to Unify Omni-Channel Ordering Chaos!

Welcome to the Unified POS

- Native solutions for in-store, drive-thru and online ordering
- Single menu management across channels
- Bi-directional integrations with delivery providers
- One unified data set, enabling one view of the guest
- Cloud enabled, not cloud dependent
- Freedom of choice to partner with best-in-class loyalty & back of house



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