

STATE OF QSR

How Quick Service is Outpacing the Restaurant Industry in Sales & Traffic



BLACK BOX
INTELLIGENCE

YEAR-TO-DATE STATS

Comp Sales

QSR **10.15%**

Industry **2.83%**

Comp Traffic

QSR **-6.7%**

Industry **-8.34%**

QSR Drive Thru Sales **46.96%**

QSR Dine-In Sales **-32.15%**

QSR To-Go Sales **-9.67%**

QSR Delivery Sales **84.53%**

Black Box Financial Intelligence™ data through October 18, 2021

Employees Per Unit

23

2018

26

2019

24

2020

23

Sales Per Labor Hour

56

Black Box Workforce Intelligence™ data through August 2021

QSR Ratings

Yelp

TripAdvisor

Google

QSR

2.58

3.50

3.78

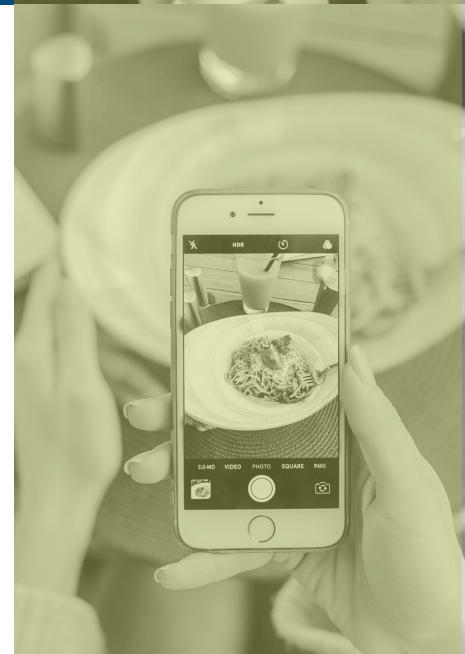
Industry

2.77

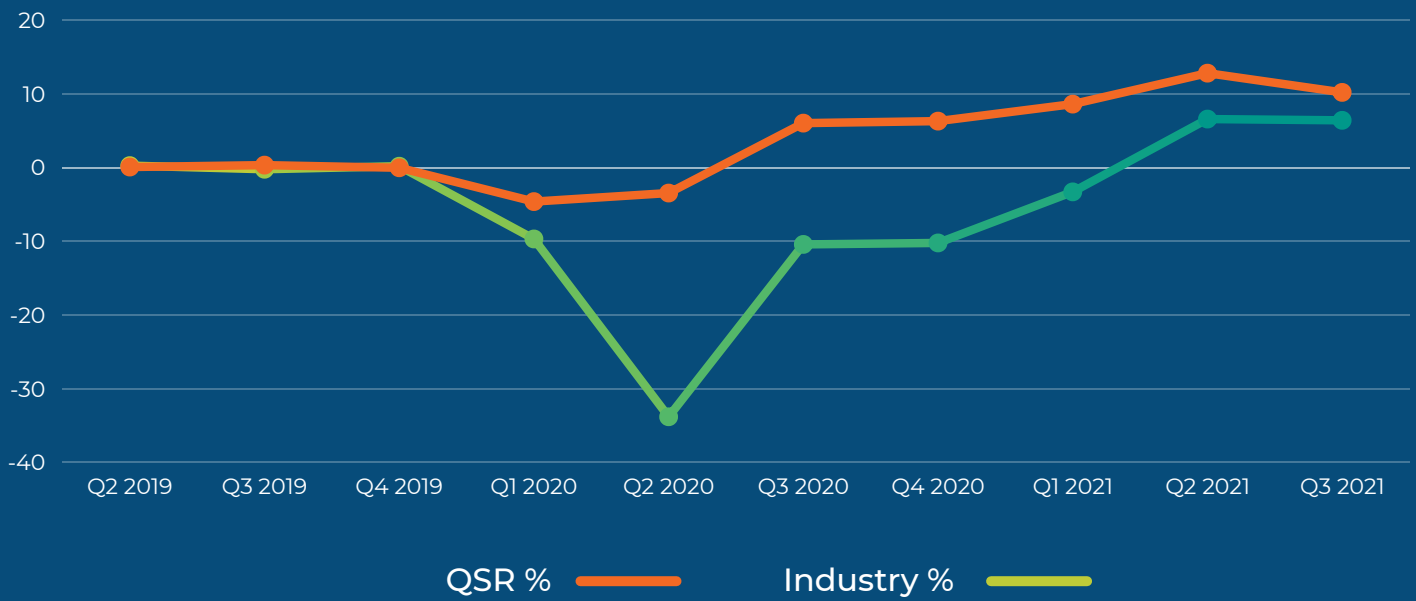
3.75

3.93

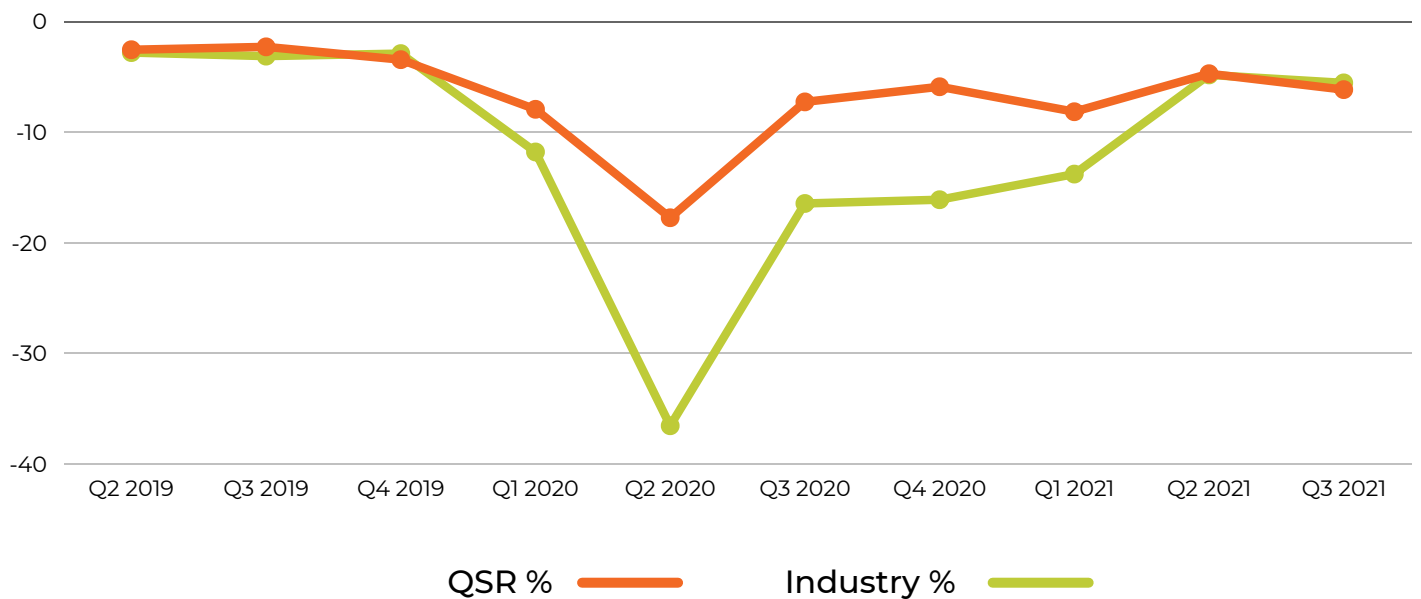
Lifetime review ratings from Black Box Guest Intelligence™



COMP SALES BY QUARTER

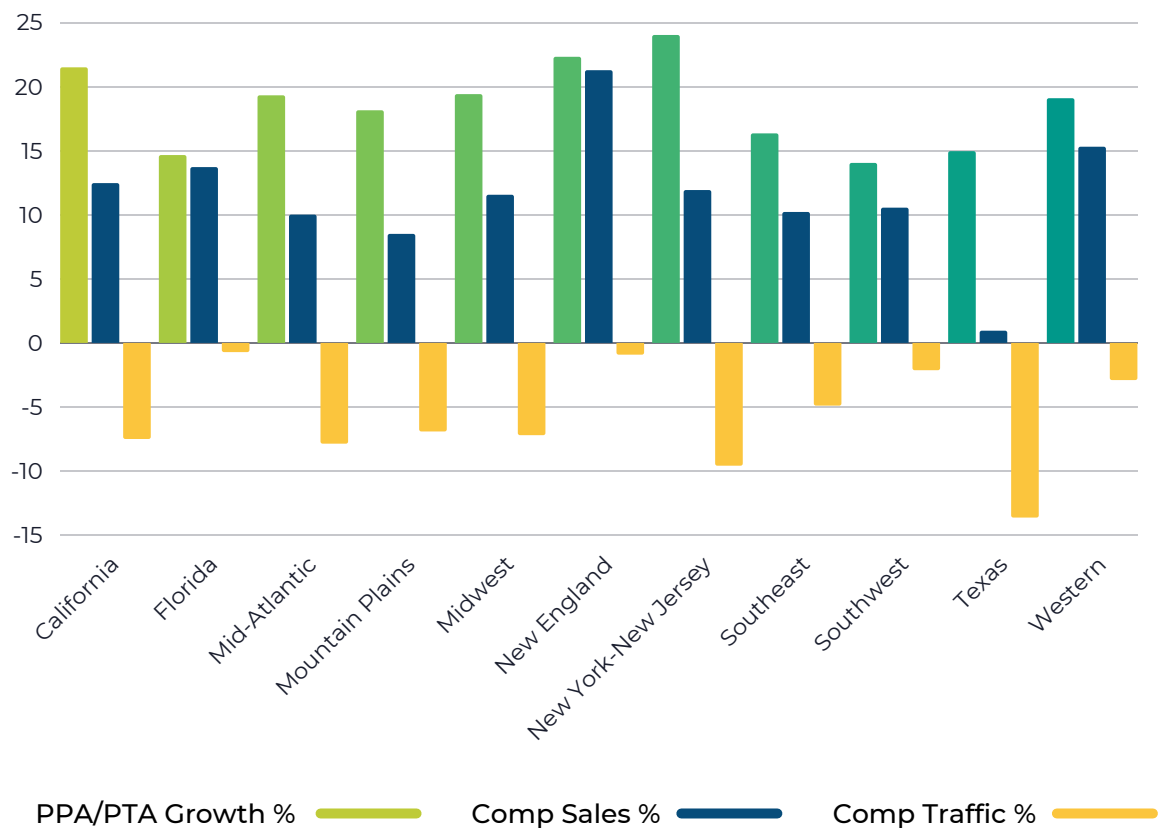


COMP TRAFFIC BY QUARTER





SALES, TRAFFIC & PPA/PTA GROWTH BY REGION



Black Box Financial Intelligence™ data through October 18, 2021

QSR QUARTERLY PERFORMANCE

	Q2 2021	Q3 2021	Q3 2019
Comp Sales	12.82%	10.21%	0.34%
Comp Traffic	-4.7%	-6.14%	-2.27%
PPA/PTA Growth	17.8%	18.2%	2.74%
Food	16.22%	12.65%	-0.52%
Bev	-0.01%	1.43%	-6.42%
Dine-In	-30.75%	-14.76%	-3.36%
To-Go	-7.13%	-3.22%	-1.53%
Delivery	43.14%	65.37%	N/A
Drive Thru	50.05%	36.85%	1.47%



QSR WORKFORCE

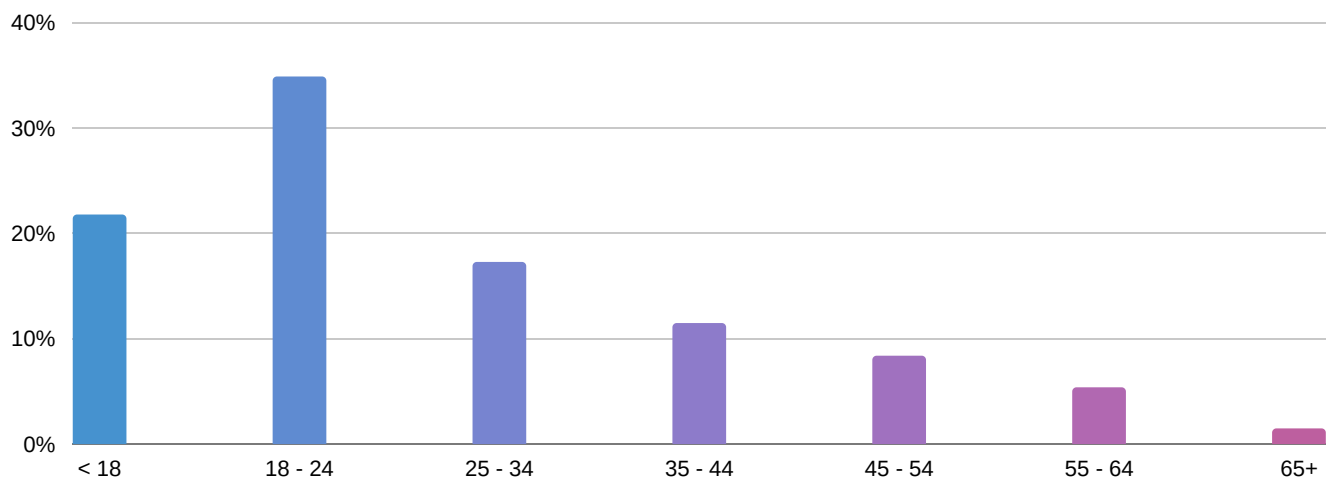
TURNOVER

QSR Management	70.6%
QSR Non-management	169.9%
<hr/>	
Limited-Service	98.7%
Full-Service	73.6%
<hr/>	
QSR	100.6%
Fast Casual	86.5%

QSR BASE SALARY

General Manager	\$51,089
Assistant Manager	\$36,606

QSR WORKFORCE BY AGE



Black Box Workforce Intelligence™ year-to-date through August 2021

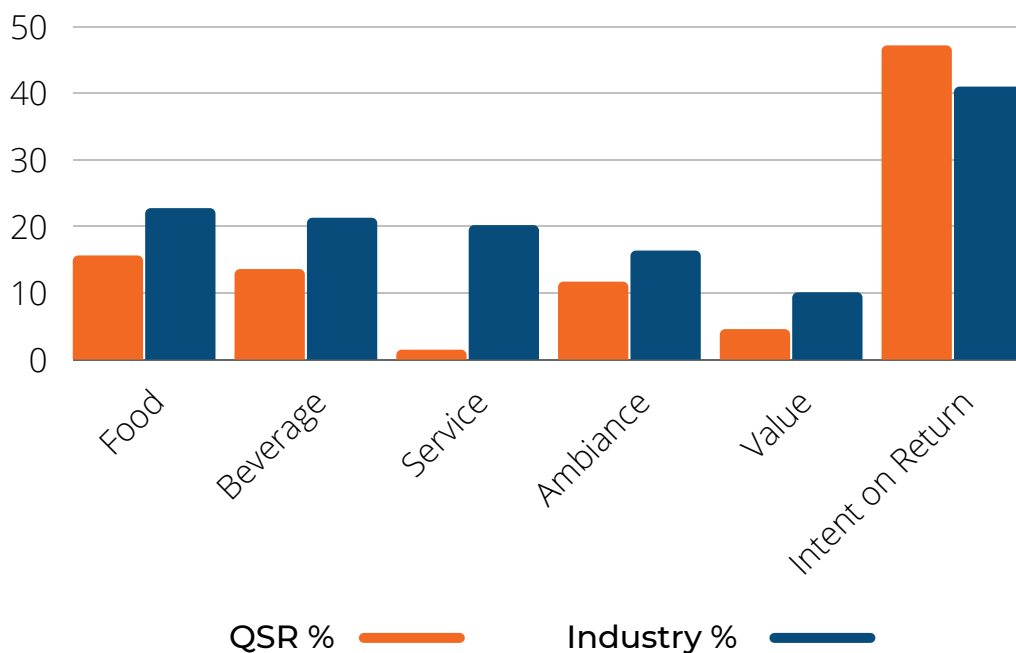
NET SENTIMENT FROM GUEST INTELLIGENCE

15.34%

Net Sentiment Year to Date for QSR Segment

16.00%

Net Sentiment Year to Date for Restaurant Industry



Black Box Workforce Intelligence™ data through October 18, 2021

TOP GUEST MENTIONS

FOOD

food
always
service
time
fast

like
location
line
staff
place



SERVICE

food
order
drive
good
staff

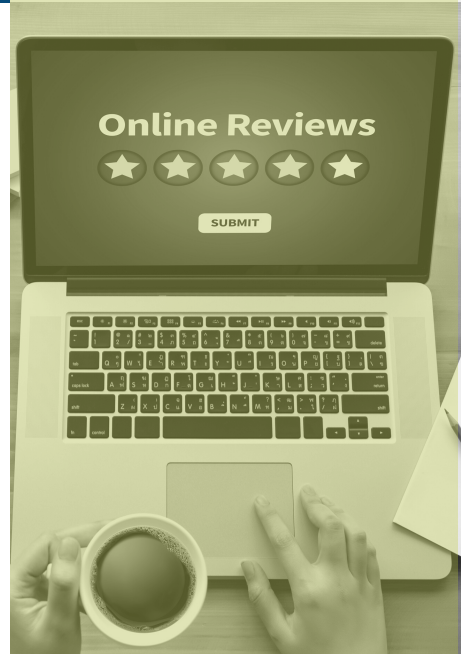
customer
like
chicken
friendly
never



INTENT ON RETURN

always
time
location
chicken
back

customer
smoothie
place
friendly
every



Black Box Workforce Intelligence™ data through October 18, 2021



GAIN A COMPETITIVE EDGE WITH BLACK BOX INTELLIGENCE

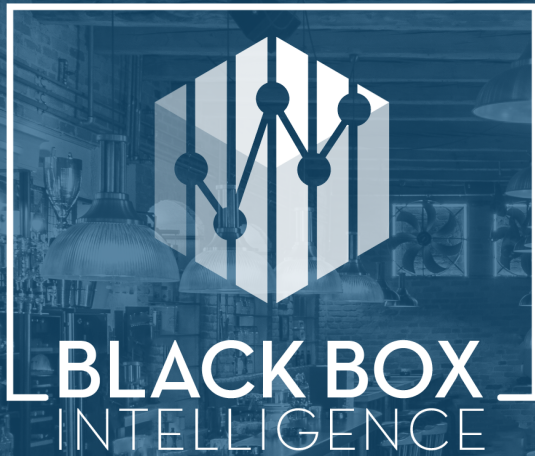
"The team at Black Box has constructed an incredible tool that **provides an unparalleled view into the restaurant industry**. Competition in today's marketplace is fierce and we are continually looking at ways to build competitive advantages for Darden. The data and insights from Black Box are a **terrific addition to our insights capabilities**."

Do you want more data and insights? This was just a sneak peak at the abundance of data we have to offer.

Whether you are looking for rich, local data, or want to benchmark against the industry overall, our team is standing by to help you find the metrics you need.

Schedule a demo today so you can see how our robust dataset will help you outperform your competition.

**SCHEDULE
DEMO**



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FINANCIAL INTELLIGENCE

Weekly sales and traffic benchmarks from the most reliable and abundant set of data and insights in the industry.

Learn more [➤](#)

WORKFORCE INTELLIGENCE

Key restaurant workforce metrics covering millions of industry employees. Includes turnover, compensation, demographics and more.

Learn more [➤](#)

GUEST INTELLIGENCE

Next-generation guest satisfaction, offering operators insight into how online guest sentiment affects the bottom line.

Learn more [➤](#)

CONSUMER INTELLIGENCE

Share of market, wallet and stomach data driven by a robust set of credit card transactions.

Learn more [➤](#)



THE BEST PRACTICES CONFERENCE

September 14 - 16, 2022

Learn more [➤](#)



BLACK BOX
FINANCIAL INTELLIGENCE

Black Box Financial Intelligence™ is the leading source of private and public company data for the restaurant industry with metrics covering sales, traffic and more.

WHY FINANCIAL INTELLIGENCE?

- Surveys over 72,000 units & over 300 restaurant brands representing nearly \$153 billion in sales revenue
- 24 metrics included: sales, traffic, food sales per labor hour, PPA, dine-in, to-go, catering, banquet, drive-thru, delivery & by daypart
- Reporting on: quick service, fast casual, family, casual, upscale casual, fine dining, counter service, table service & the industry
- Secure Data Exchange: SSAE 16 Certified
- Benchmark by segment or cuisine
- Weekly to annual time period analysis
- Access to leading edge thought leadership: annual conferences & quarterly webinars
- DMA & market share products
- Access to client only state of the industry webinars, whitepapers and more

ANNUAL EVENT

The Best Practices Conference

Our annual event that delivers powerhouse industry research, unrivaled insights, inspirational keynotes and best practices that focus on the key intersection of people, profits and purpose.



Financial Intelligence serves as a great resource that allows us to make informed decisions and better understand the restaurant environment. The detailed reports and sophisticated platform are used throughout our organization in order to grow sales. Black Box Intelligence is a great partner!

RONI RUBINSTEIN

SR. FINANCIAL ANALYST
POTBELLY SANDWICH SHOP



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