

# 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**

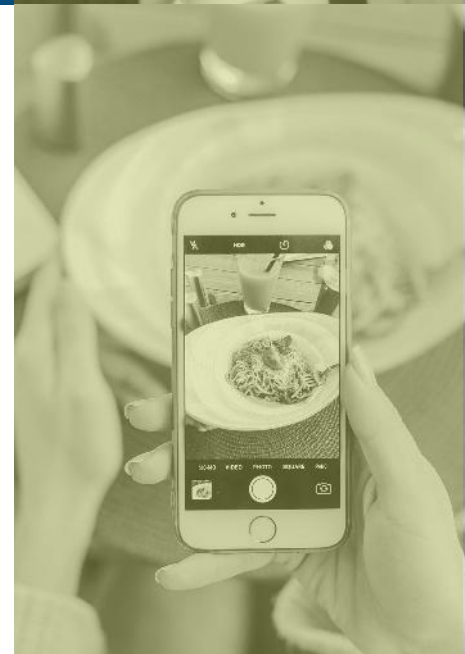
Industry

**2.77**

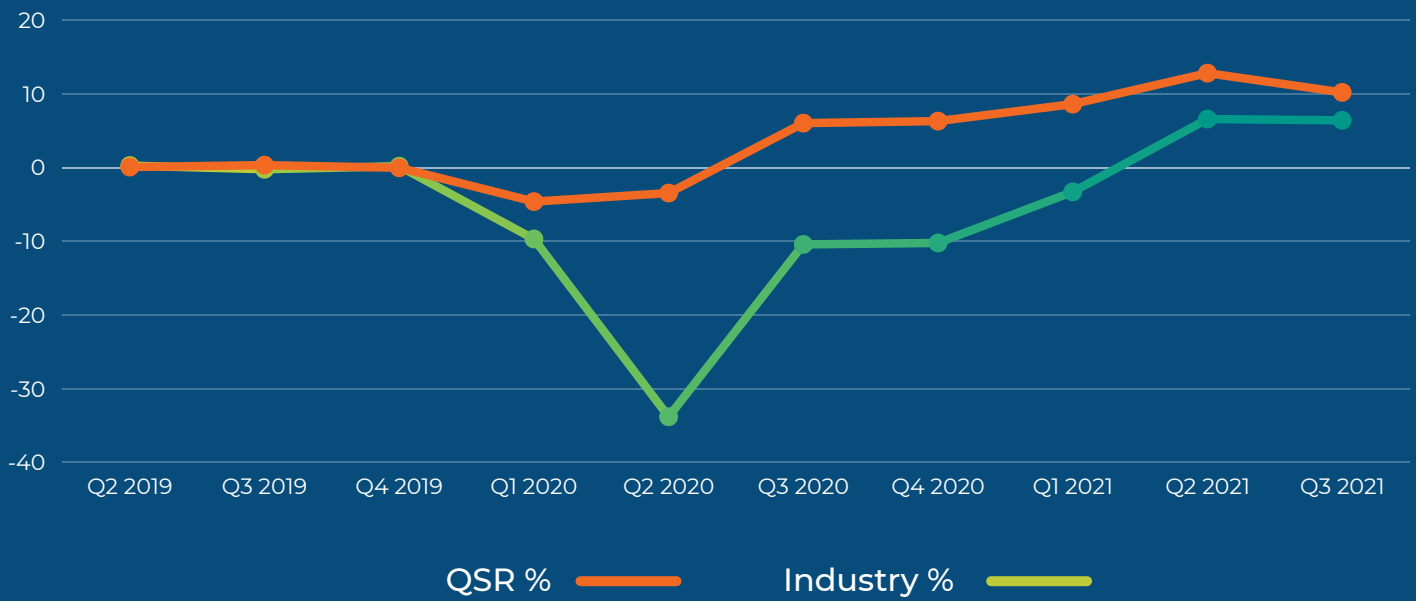
**3.75**

**3.93**

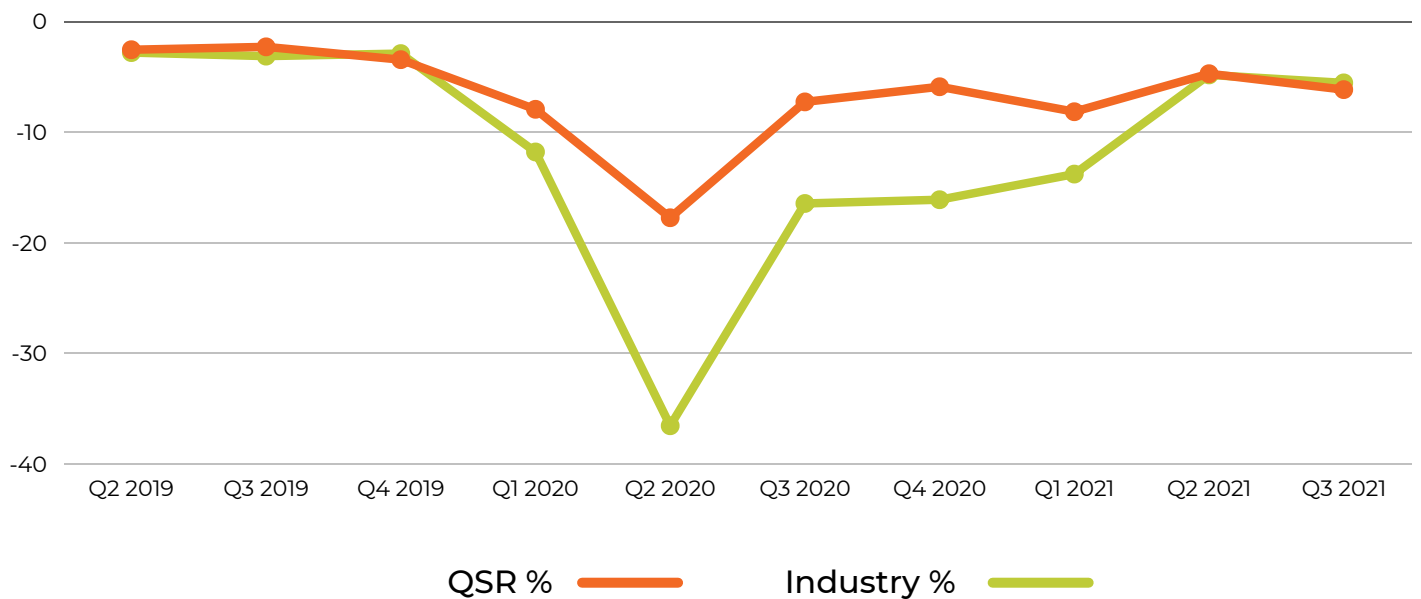
*Lifetime review ratings from Black Box Guest Intelligence™*



# COMP SALES BY QUARTER

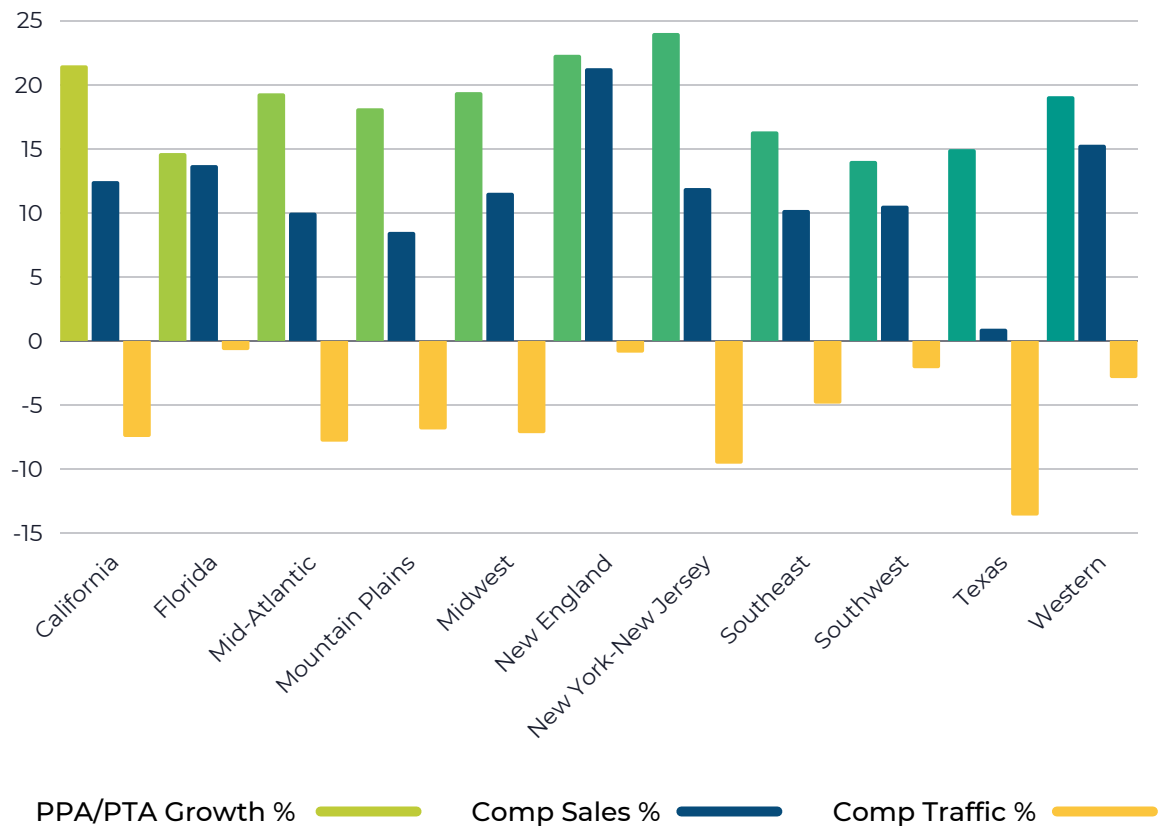


# COMP TRAFFIC BY QUARTER





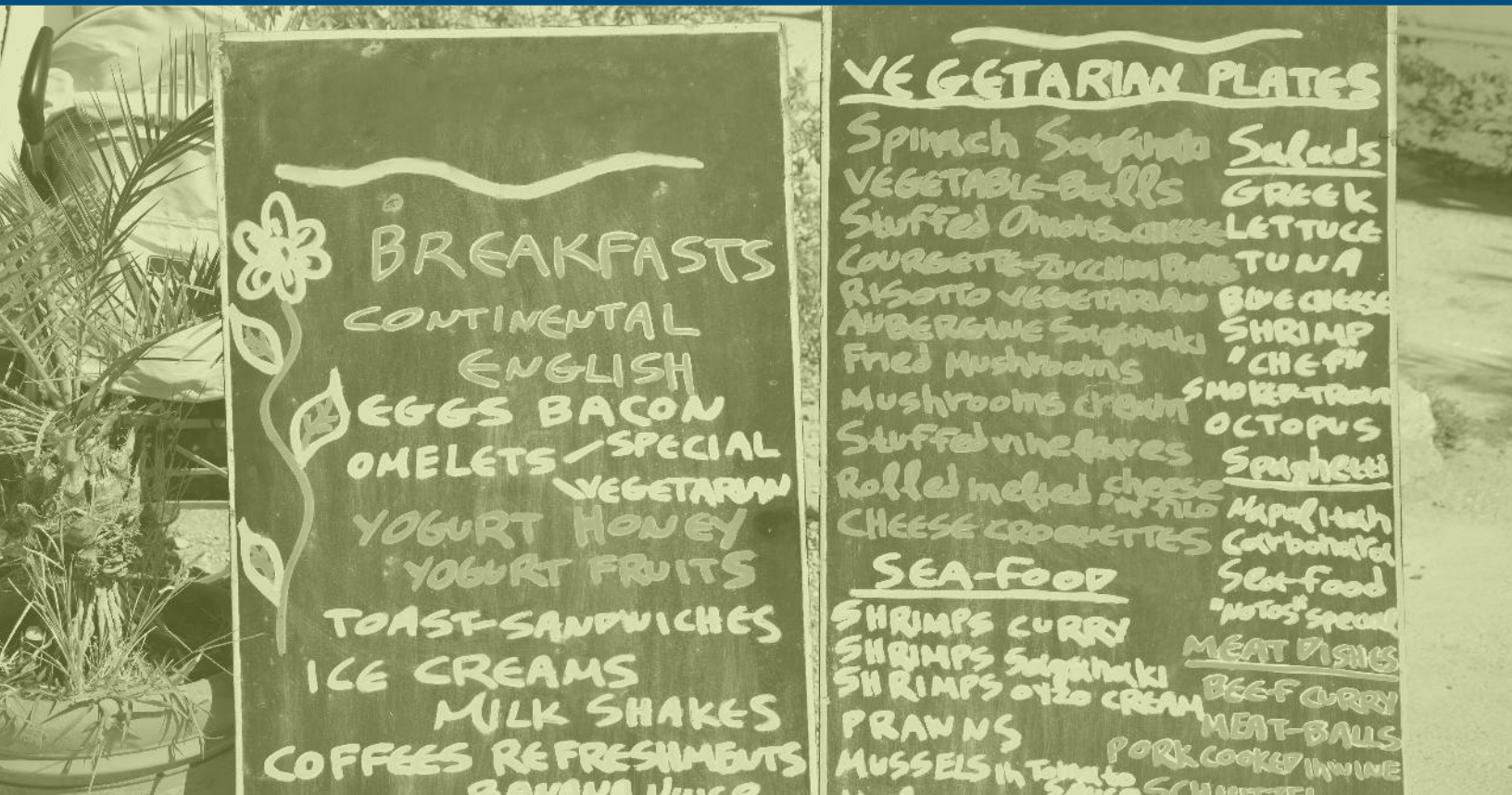
# SALES, TRAFFIC & PPA/PTA GROWTH BY REGION



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

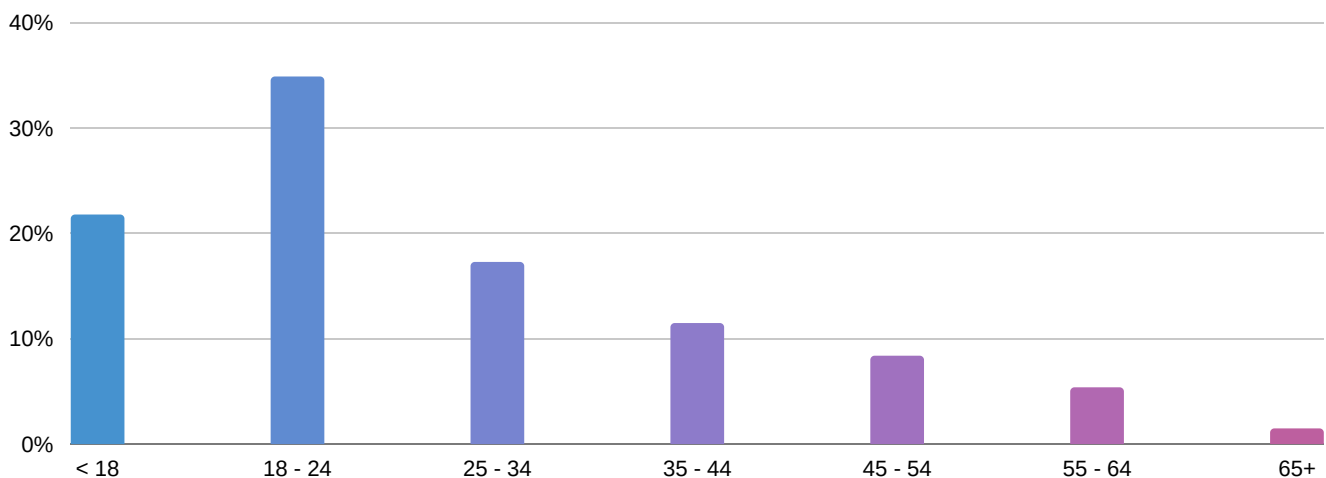
## TURNOVER

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

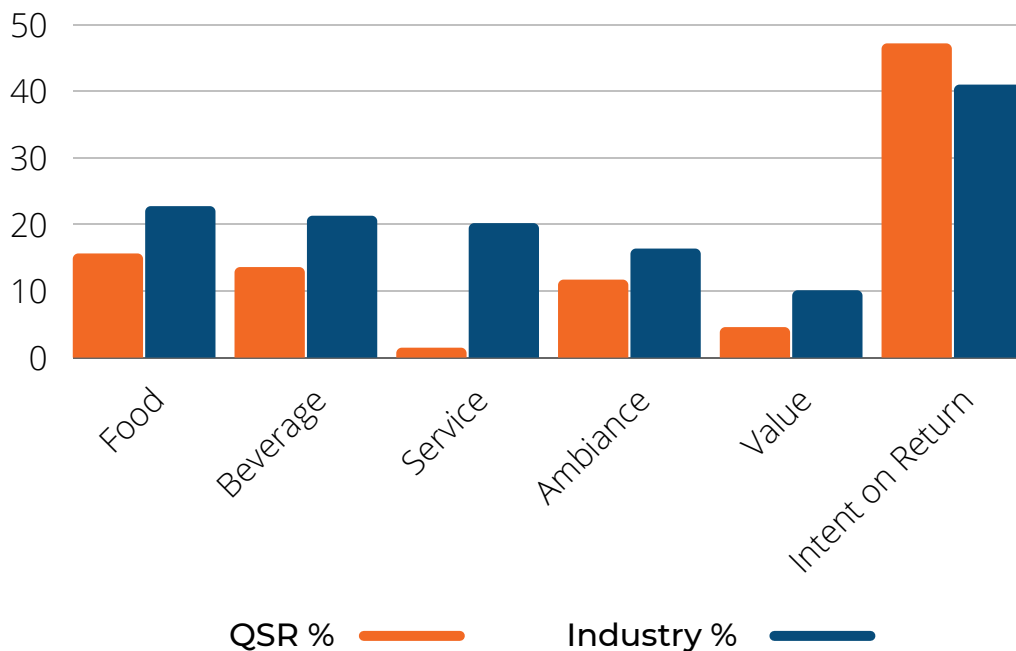
# NET SENTIMENT FROM GUEST INTELLIGENCE

# 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

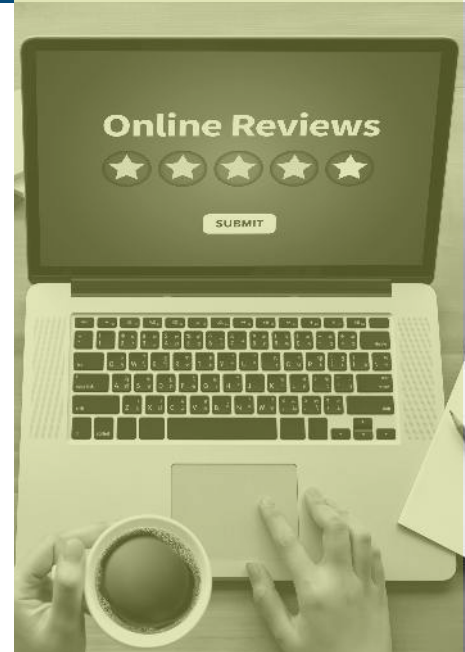
customer  
like  
chicken  
friendly  
never



## 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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INTELLIGENCE

BlackBoxIntelligence.com



## 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!

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**RONI RUBINSTEIN**

SR. FINANCIAL ANALYST  
POTBELLY SANDWICH SHOP



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