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# Driving QSR Growth & Revenue

## The 2027 QSR Digital KPI Guide



# Digital ordering is where Australian quick service restaurant (QSR) brands are finding growth going into 2027, with app, kiosk and delivery orders taking a growing share of sales.

For marketing, digital and technology leaders, the challenge is working out which digital investments increase customer visits, lift contribution per order and bring customers back.

This guide sets out 33 KPIs and what good looks like for each in 2027, drawing on Australian and international research.

# 6 shifts affecting QSR performance in 2027

## 01 Sales growth is coming from price

Australian QSR sales have grown about 5% a year with volume roughly flat, and results vary widely between brands.

- Visits rose about 1% in the year to June 2026 while meals out prices rose 4.5%. Guzman y Gomez grew comparable sales 5.3% in FY26, and Domino's ANZ fell 4.7%.
  (BCG, 2026; Circana, 2026; ABS, 2026, AUS)

## 02 Customers are turning to bundles

Around 40% of QSR visits are now deal-led, and bundle meals now account for 27% of visits.

- Bundles raise spend per order. In BCG's Australian survey, bundle orders averaged $44, against $30 for discount-only deals and $33 with no promotion.
  (Circana, 2026; BCG, 2026, AUS)

## 03 Delivery runs on two platforms

Menulog closed in November 2025, and Hungry Jack's signed an exclusive deal with Uber Eats in May 2026.

- Delivery spending grew 23% in the year to June 2026. Uber Eats charges 30% on orders it delivers, so your own-app share directly affects margin.
  (Circana, 2026; Uber Eats, 2026, AUS)

## 04 Operators now carry higher card and wage costs

Card surcharges ended on 1 October 2026, and award wages rose 4.75% from 1 July. Both raise menu prices or reduce margins.

- Kiosks are one response to higher wage costs. KFC Australia's digital share rose 9 percentage points in FY26 to 43.2%, driven by kiosks and delivery.
  (RBA, 2026; Fair Work Commission, 2026; Collins Foods, 2026, AUS)

## 05 Privacy rules are tightening

From 10 December 2026, privacy policies must disclose automated decisions that could significantly affect a person.

- Draft reforms would also bring targeted advertising under the direct marketing rules. Under-16s have been barred from major social platforms since December 2025, so brands can no longer reach them there.
  (Attorney-General's Dept, 2026; eSafety, 2025, AUS)

## 06 AI is becoming an ordering channel

McDonald's Australia and Hungry Jack's are trialling AI voice ordering, and 47% of Australians have used AI for a QSR task.

- In the US, customers can already order inside ChatGPT and Google Maps. Here, 40% of Australians are open to ordering through AI assistants, and an assistant could sit between brands and their customers, as delivery platforms do.
  (Google, 2026; Uber Eats, 2026, US; BCG, 2026, AUS)

# Financial & business performance metrics

## 01 Same-store sales growth (SSS)

This tracks year-on-year sales growth at restaurants open for at least 12 months, showing whether your existing restaurants are growing sales.

- FY26 results ranged from growth of 5.3% at Guzman y Gomez and 2.7% at KFC Australia to a fall of 4.7% at Domino's ANZ.
  **Target:** growth at or above meals out inflation, which was 4.5% in the year to June 2026.
  (Company results, 2026; ABS, 2026, AUS)

## 02 Average transaction value (ATV)

This measures the average spend per order. Splitting it into price and items per order shows whether customers are buying more items or paying more per item.

- With meals out prices up 4.5%, ATV growth of 1–2% means smaller baskets. Bundle orders average $44, against $30 for discount-only deals.
  **Target:** ATV growth at or above meals out inflation, with items per order holding steady.
  (ABS, 2026; BCG, 2026, AUS)

## 03 Return on marketing investment (ROMI)

This measures the sales generated for each dollar of marketing spend.

- 78% of US marketing leaders say weak measurement wastes at least 10% of spend. Compare sales from customers who saw a campaign with sales from a control group to estimate each channel's extra sales.
  **Target:** incremental margin above the spend on every major channel, with budget moved each quarter toward the channels returning the most.
  (Haus, 2026, US)

## 04 Market share

This measures your brand's share of total QSR sales against competitors.

- With visits roughly flat, most growth has to come from winning customers from competitors.
  **Target:** a gain of 0.5–1 percentage point of share a year, measured with the same panel data each year.
  (Circana, 2026, AUS)

## 05 Gross margin and promotional mix

This measures the margin after food and packaging costs, and the share of sales that comes through deals.

- A gross margin of 65–70% remains the benchmark (Chipotle's food, beverage and packaging costs were 29.7% of revenue in the June 2026 quarter), and around 40% of Australian QSR visits are deal-led.
  **Target:** a gross margin of 65–70%. Track the margin each promotion gives away separately.
  (Chipotle, 2026, US; Circana, 2026, AUS)

## 06 Order accuracy rate

This measures the percentage of orders fulfilled correctly.

- US drive-thru accuracy averaged 89.3% in 2026, and the best brand reached 96%.
  **Target:** 90% as a baseline and 95% or higher as leading performance.
  (Intouch Insight, 2026, US)

## 07 Restaurant-level profitability

This measures the financial performance of individual restaurants, including food costs, labour costs and margin.

- KFC Australia's restaurant EBITDA margin was 21.0% in FY26 and Guzman y Gomez's 20.3%, with award wages up 4.75%.
  **Target:** an 18–22% margin and labour at 25–30% of sales, with food and packaging costs held within the gross margin target above.
  (Company results, 2026, AUS)

# Customer experience & engagement metrics

## 01 Customer traffic

This measures the number of customer visits across your restaurants.

- Australian foodservice visits grew about 1% in the year to June 2026, and fast food buyers average 3.8 visits every four weeks.
  **Target:** 2–3% growth a year, which now means winning visits from your competitors.
  (Circana, 2026; Roy Morgan, 2026, AUS)

## 02 Customer satisfaction

This measures how satisfied customers are with each visit.

- US quick service restaurants scored 79 out of 100 on the ACSI for the third year running.
  **Target:** a score of 79 or higher on a 100-point satisfaction survey run the same way each year.
  (ACSI, 2026, US)

## 03 Net Promoter Score (NPS)

This measures how likely customers are to recommend your brand, an early indicator of brand health.

- **Target:** an NPS above your nearest competitor's, tracked quarterly.

## 04 Customer acquisition cost (CAC)

This measures the average cost of acquiring a new customer across marketing channels.

- Delivery commissions work partly as an acquisition cost, although they apply to every order rather than only a new customer's first. Uber Eats charges 30% on marketplace orders it delivers.
  **Target:** each new customer's acquisition cost recovered from the margin on their orders within 90 days, measured by channel.
  (Uber Eats, 2026, AUS)

## 05 Brand awareness and reach

This measures how many people know your brand and buy from it.

- Aided awareness of national brands is close to universal, so reach is the more useful measure: 48.7% of Australians bought from McDonald's in the past six months and 44.4% from KFC.
  **Target:** six-month reach rising by at least 1 percentage point a year.
  (Roy Morgan, 2026, AUS)

## 06 Social media engagement

This tracks likes, shares, comments and saves per post, relative to follower count.

- The 2026 median across industries was 0.30% on Instagram and 2.01% on TikTok. Food and beverage brands averaged 0.40% on Instagram and 0.03% on Facebook.
  **Target:** an engagement rate above the food and beverage median for each platform you use.
  (Rival IQ, 2026, Global)

## 07 Speed of service

This measures drive-thru time, from joining the queue to collecting the order.

- The US average was 324 seconds in 2026, and the fastest brands were Tim Hortons at 260 seconds and KFC at 265.
  **Target:** under 300 seconds.
  (Intouch Insight, 2026, US)

## 08 Customer support efficiency

This measures the speed and quality of customer support, from first response to resolution.

- 88% of consumers expect faster replies than a year ago.
  **Target:** a first reply within 24 hours on every channel, and contacts per 1,000 orders falling year on year.
  (Zendesk, 2026, Global)

# Digital ordering & loyalty metrics

## 01 Digital share of sales

This measures the share of sales through apps, websites, kiosks and delivery platforms.

- KFC Australia reached 43.2% in FY26 and Guzman y Gomez 49%.
  **Target:** 45–50% for burger, chicken and Mexican brands. State which channels your figure includes, as brands define it differently.
  (Company results, 2026, AUS)

## 02 App performance

This measures the share of sales through your own app and how customers rate it.

- Guzman y Gomez took 25% of its FY26 sales through its app, including app-ordered delivery. Major Australian QSR apps were rated between 4.2 and 4.7 on the App Store in October 2026, with MyMacca's highest.
  **Target:** 20–25% of sales through the app and a rating of 4.5 or higher.
  (Guzman y Gomez, 2026; Apple App Store, 2026, AUS)

## 03 Loyalty program performance

This measures members' share of sales, how many members are active and how much more often they visit.

- Starbucks Rewards members account for 59% of spending at US company-operated stores. Australian loyalty members visit 1.9 times as often as other customers.
  **Target:** members at 30–40% of sales and at least 60% of members active, with 'active' defined (for example, a purchase in the past 90 days). Measure extra visits against non-members.
  (Starbucks, 2026, US; BCG, 2026, AUS)

## 04 Online ordering conversion

This measures the share of app and website sessions that end in a paid order, and the share of started orders that are abandoned.

- Across ecommerce, 70.2% of carts are abandoned, often because of extra costs or forced account creation.
  **Target:** fewer than half of started orders abandoned, with drop-off measured at each checkout step.
  (Baymard, 2026, Global)

## 05 Repeat rate and lapsed customers

This measures the share of new customers who order again within 30 days and within 90 days, and known customers who have stopped ordering.

- Globally, McDonald's has nearly 220 million active loyalty members and up to 150 million who have lapsed. It is adding tiers to bring them back.
  **Target:** more than half of new customers reordering within 90 days, and fewer known customers lapsing each year.
  (Restaurant Dive, 2026, Global)

## 06 Own-channel and aggregator delivery

This measures the share of delivery orders placed through your own app and website rather than through Uber Eats and DoorDash, and the commission paid on each.

- Uber Eats Australia charges 30% on marketplace orders it delivers and 25% on those placed through its branded web shop. Collins Foods said delivery growth reduced KFC Australia's margin.
  **Target:** at least 25% of delivery orders through your own app and website.
  (Uber Eats, 2026; Collins Foods, 2026, AUS)

## 07 Kiosk adoption and order value

This measures the share of in-store orders placed at kiosks, and their average order value against counter orders.

- Kiosk visits in Australian foodservice have risen 57% since 2023.
  **Target:** kiosk order value above counter orders.
  (Circana, 2026, AUS)

## 08 Card payment costs

This measures the cost of accepting card payments as a share of card sales, now that surcharges have ended.

- Surcharges on eftpos, Mastercard and Visa ended on 1 October 2026. Cards are 73% of consumer payments, and phones are used for about 40% of card payments.
  **Target:** card costs below 1% of card sales, checked monthly.
  (RBA, 2026, AUS)

# AI metrics

## 01 AI voice ordering accuracy

This measures the share of orders taken by AI that are correct, and how many the AI completes without staff.

- US AI-enabled drive-thrus got 90.8% of orders right, against 86.7% for the same brands with staff, and the AI completed 77 of 92 orders.
  **Target:** accuracy at or above that of staffed drive-thrus.
  (Intouch Insight, 2026, US)

## 02 AI voice ordering speed

This measures service times at AI-enabled drive-thrus, how often add-ons are offered and how often customers repeat themselves.

- AI-enabled drive-thrus were about the same speed (314 seconds against 315) but offered add-ons in 79.2% of visits, against 59.2% at staffed drive-thrus. Almost a third of customers, 29.1%, repeated part of their order.
  **Target:** no slower than staffed drive-thrus.
  (Intouch Insight, 2026, US)

## 03 Share of AI recommendations

This measures how often your brand is named when people ask ChatGPT, Gemini or Google where to eat.

- Most restaurant locations, 83%, never appear in AI recommendations, and ChatGPT mostly recommends places rated 4.3 stars or higher.
  **Target:** a rating of 4.3 or higher and a place in the top three AI recommendations for your category.
  (Uberall, 2026, Global)

## 04 Discovery through AI tools

This measures how many customers use AI to choose a restaurant, and the referral traffic AI tools send.

- Nearly half of Australians, 47%, have used AI for a QSR task, and 17% have used it to research restaurants.
  **Target:** AI referrals reported as their own channel in analytics.
  (BCG, 2026, AUS)

## 05 Ordering through AI assistants

This measures orders that start inside an AI assistant, and how many reach your own app.

- Ordering inside AI assistants is not yet live in Australia. In the US, Little Caesars, Uber Eats and Google Maps take orders inside AI tools, and 40% of Australians are open to the idea.
  **Target:** AI-started orders tracked as their own channel.
  (PMQ Pizza Magazine, 2026; Uber Eats, 2026; Google, 2026, US; BCG, 2026, AUS)

## 06 AI personalisation lift

This measures incremental sales from AI-chosen offers, compared with sales from customers who do not receive them.

- **Target:** at least 5% extra sales from personalised offers, measured against a control group.

# Innovation & strategic growth metrics

## 01 New product success

This measures how much new menu items and limited-time offers add to sales, margin and customer visits.

- Chick 'N' Dip lifted chicken from 7.5% to 9% of Domino's UK sales in five months.
  **Target:** new items and limited-time offers at 10–15% of sales in their first year, at or above menu margin.
  (Domino's Pizza Group, 2026, UK)

## 02 Daypart expansion

This measures sales growth from new dayparts such as breakfast and late-night trading.

- Guzman y Gomez's FY26 growth was led by breakfast and trading after 9 pm, and KFC Australia is extending late-night trading.
  **Target:** 15–20% sales growth in the targeted daypart in its first year.
  (Company results, 2026, AUS)

## 03 Channel mix

This measures sales share across drive-thru, dine-in, takeaway and delivery.

- Australian delivery spending rose 23% in the year to June 2026, against about 5% for foodservice overall.
  **Target:** contribution margin known for every channel and reviewed monthly, so mix decisions are based on margin rather than sales.
  (Circana, 2026, AUS)

## 04 Sustainability metrics

This measures progress on emissions and packaging.

- Collins Foods aims for a 30% cut in emissions by 2030, about 6% a year, and more than 80% of KFC Australia's packaging is recyclable.
  **Target:** 5–8% annual cuts in Scope 1 and 2 emissions, and 80% or more recyclable customer packaging.
  (Collins Foods, 2026, AUS)

# Driving digital revenue for Australia's leading QSR brands

Adrenalin partners with leading QSR and enterprise brands to close digital revenue gaps through structured UX and CX audits, platform conversion optimisation and AI-accelerated delivery, all backed by Australia's only 365-day software warranty.

> **Adrenalin has been an invaluable partner. Their innovative approach has not only enhanced our customer experience but also driven significant sales through our digital channels.**
>
> Claudio Salinas, CIO, Hungry Jack's

Nando's

Chatime

HUNGRY JACK'S

CONCEPT EIGHT

# Adrenalin is a leading digital partner for Australian QSR brands, helping them grow digital sales. For one of Australia's most iconic QSR brands, digital sales went from 6% to 34% of revenue.

ADRENALIN

We partner with QSR leaders to deliver better digital experiences for customers, unifying fragmented ordering channels, eliminating checkout friction and building connected ecosystems that measurably increase average transaction value, app engagement and customer lifetime value.

## Our expertise includes

- Mobile app design and build for QSR
- Online ordering and ecommerce experience
- Agentic commerce and AI automation
- Loyalty, CRM integration and personalisation
- Gamification and engagement to drive repeat visits
- End-to-end digital product strategy


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