In partnership with



The Modern QSR Playbook:

Building Faster, More Connected Restaurant Operations Through Technology

October 8, 2026

Copyright © 2026 Coresight Research. All rights reserved.

Executive Summary

Digital technology has become foundational to quick-service restaurant (QSR) operations, yet only about half of operators realize meaningful benefits from even the most widely adopted technologies. Fragmented systems and workflows are limiting returns as restaurant operations become increasingly complex. In response, QSR operators are shifting from incremental point solutions toward integrated technology environments that enable connected operational workflows. This shift can unlock greater value across four critical areas identified in this research: ordering, kitchen execution, fulfillment and supply chain.

Coresight Research Analysis

1. ***QSR Operators Are Navigating an Increasingly Complex Operating Environment***

   Rising customer expectations for convenience, food quality, and speed, a growing mix of ordering channels and labor constraints are reshaping the QSR environment and increasing the complexity of restaurant operations.

2. ***Technology Has Become Essential QSR Operating Infrastructure***

   In-restaurant technologies—including digital menus, self-order kiosks, kitchen display systems (KDSs) and POS platforms—are now embedded across leading QSR operations: 95% of operators have moved beyond the pilot stage, and more than 70% consider these technologies central to their operations.

3. ***Technology Investment Is Delivering Measurable Returns, but Significant Value Remains Untapped***

   Technology investments are delivering measurable gains, yet even the most common benefits reach only about half (50%) of operators. To capture greater value, operators are building integrated technology environments to connect data, systems and activities across restaurant workflows.

4. ***To Unlock Additional Value, QSR Operators Are Reorienting Technology Around Connected Workflows***

   The opportunity spans customer engagement and ordering, kitchen and restaurant operations, fulfillment and delivery coordination, and supply chain visibility and traceability, with integrated technologies creating the foundation to connect activities within and across these areas.

5. ***Building the Foundation for Connected QSR Operations at Scale***

   Building and scaling connected QSR operations depends on three critical factors: an integrated technology foundation, business alignment, and a people-focused approach to adoption and change management.

Contents

Contents 3

Introduction 4

Research Scope 5

Coresight Research Analysis 6

- QSR Operators Are Navigating an Increasingly Complex Operating Environment 6
- Technology Has Become Essential QSR Operating Infrastructure 8
- Technology Investment Is Delivering Measurable Returns, but Significant Value Remains Untapped 9
- To Unlock Additional Value, QSR Operators Are Reorienting Technology Around Connected Workflows 12
- Building the Foundation for Connected QSR Operations at Scale 19

What We Think 21

- Implications for QSR Operators 22

Notes and Methodology 23

- About Coresight Research Custom Reports 24
- About Zebra Technologies & Elo Touch Solutions 24

Introduction

Technology is already foundational to quick-service restaurant (QSR) operations. Digital systems are deployed across nearly every touchpoint—from customer engagement and ordering to kitchen execution, labor management and inventory. Yet widespread adoption alone does not unlock the full value of these investments. Greater gains emerge when technologies work together as part of connected operational workflows, allowing information, decisions and actions to flow across the restaurant. By integrating activities from order placement through preparation and fulfillment, connected systems can reduce friction between workflows, improve execution and help restaurant teams make faster, better-informed decisions.

QSR operators can use this report as a market playbook for building and operating a fully connected digital architecture across their store ecosystems. The report will examine four key workflows across the QSR service lifecycle: customer engagement and ordering, kitchen and restaurant operations, fulfillment and delivery coordination, and supply chain visibility and traceability.

This report is produced and made available to nonsubscribers of **Coresight Research** in partnership with **Zebra Technologies** and **Elo Touch Solutions**.

- Zebra Technologies provides enterprise hardware, software and data-capture solutions that support frontline operations across industries, including hospitality, retail, logistics, healthcare and manufacturing.
- Elo Touch Solutions, now part of Zebra Technologies, provides software-agnostic interactive technology solutions spanning POS, self-service, payments, kitchen displays, digital signage and mobile workflows across customer-facing and operational environments.

Copyright © 2026 Coresight Research. All rights reserved.

Research Scope

For the purpose of the survey conducted along with the report, “in-restaurant technology” refers to hardware and software systems deployed by QSR operators:

Customer interaction technologies—hardware and software that customers use directly or experience inside the restaurant.

Hardware

- Digital menu boards
- Self-order kiosks (indoor and drive-thru)
- Integrated payment terminals
- Drive-thru and in-store POS displays
- Table-service tablets
- Smart pickup cabinets
- Customer-facing POS displays

Software

- Point-of-sale (POS) platforms
- Mobile-ordering applications
- AI recommendations and personalized promotions
- Drive-thru AI/voice ordering
- Integrated payment software
- Real-time order tracking
- Customer loyalty and CRM platforms

Kitchen and restaurant operations technologies—hardware and software that restaurant staff use to coordinate kitchen production, fulfillment and operations.

Hardware

- KDS displays
- Counter POS terminals
- Handheld order-taking devices
- Barcode scanners/RFID readers
- RFID tags, 2D barcodes and intelligent labels
- Environmental monitoring sensors

Software

- KDS software
- Order intake and management platforms
- Kitchen operational dashboard systems
- Labor management systems
- Industrial kitchen controls
- Equipment monitoring/Internet of Things (IoT) platforms
- AI demand forecasting
- Delivery dispatch platforms
- Food traceability platforms

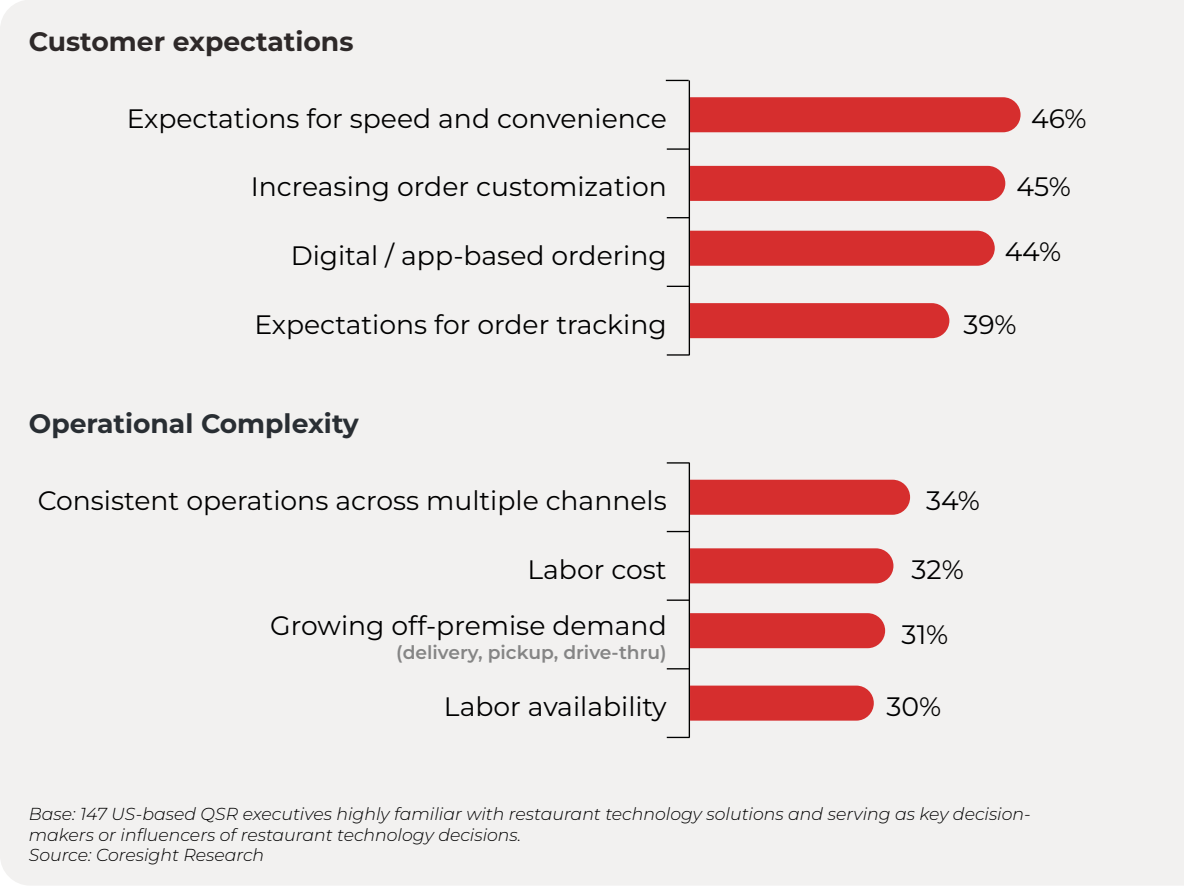
Copyright © 2026 Coresight Research. All rights reserved.

1 QSR Operators Are Navigating an Increasingly Complex Operating Environment

Delivering consistent products and quality customer experiences at scale has long been central to the QSR operating model. In recent years, however, fulfilling that promise has become increasingly complex. Three shifts are driving this change:

- **Customer expectations continue to rise.** QSR operators most frequently identified expectations for speed and convenience (46%), greater order customization (45%), and digital or app-based ordering (44%).
- **Customer interactions now span dine-in, drive-thru, mobile, kiosk, delivery and phone-based channels.** As customer journeys become more fragmented, operators identified consistent execution across multiple channels (34%) as a leading source of operational complexity.
- **Operational pressures are increasing.** Operators cited labor costs (32%), growing off-premise demand (31%) and labor availability (30%) among the most significant challenges affecting restaurant operations.

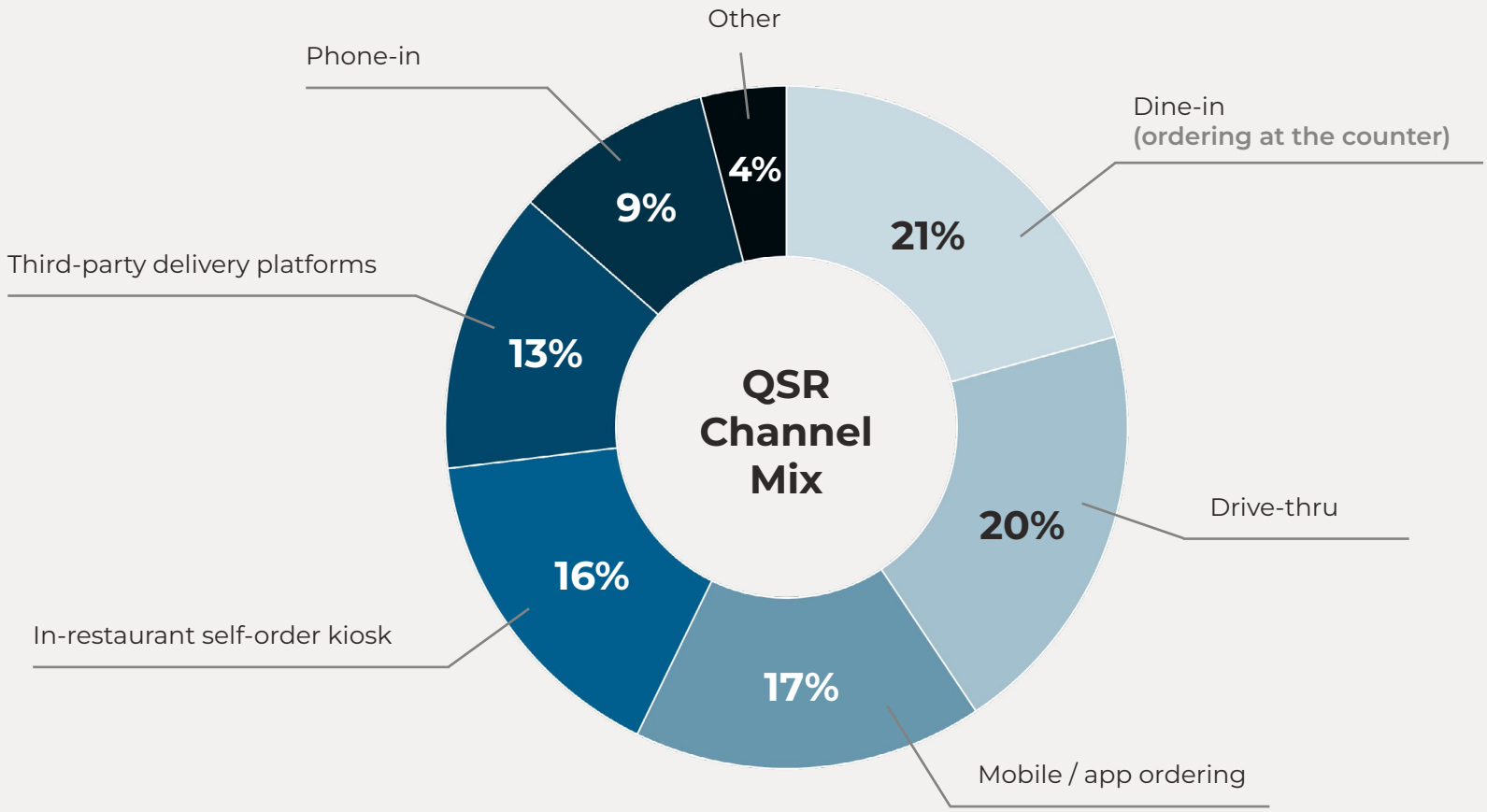
Figure 1.
Top Forces Reshaping QSR Operations (% of Respondents)



Base: 147 US-based QSR executives highly familiar with restaurant technology solutions and serving as key decision-makers or influencers of restaurant technology decisions.
Source: Coresight Research

Copyright © 2026 Coresight Research. All rights reserved.

Figure 2.
Customer Interactions Spanning a Growing Mix of Channels (% of Orders by Channel)



Base: 147 US-based QSR executives highly familiar with restaurant technology solutions and serving as key decision-makers or influencers of restaurant technology decisions.
Source: Coresight Research

Copyright © 2026 Coresight Research. All rights reserved.

2 Technology Has Become Essential QSR Operating Infrastructure

Leading operators are increasingly relying on digital tools for both customer-facing and back-of-house operations. Our survey found that:

- **Ninety-five percent** of leading QSR operators have moved beyond pilot programs and are scaling proven in-restaurant technologies.
- **More than 70%** said these technologies have become central to their restaurant operations.

Order intake and management platforms, self-service kiosks, kitchen management systems, handheld devices and inventory management tools are now common across much of the QSR industry. The expansion of these technologies is visible at leading QSRs such as McDonald's, Shake Shack, Panera and Wendy's, where operators have scaled digital ordering, kiosks, menu boards, payments, loyalty platforms and restaurant execution systems.

Industry Insight

"QSR operators are already using voice ordering, computer vision, labor-scheduling tools and integrated delivery applications. Technologies such as digital signage have also become standard across the industry."



Rob Grimes
Founder and CEO
International Food and Beverage Technology Association (IFBTA)

McDonald's began its digital transformation journey "Digitizing the Arches" in 2015, investing in foundational technologies such as digital menu boards, self-service kiosks, mobile ordering, digital payments, delivery integration and loyalty platforms. By Q4 2025, the company reported more than 210 million 90-day active loyalty users across 70 loyalty markets.

Shake Shack began scaling digital ordering early: by 2021, kiosks and other digital channels accounted for more than 75% of sales at locations with kiosks. By the end of 2023, kiosks had reached nearly all US company-operated Shacks, and by 2024 had become the company's largest and most profitable ordering channel.

Panera launched its "Panera 2.0" transformation program in 2014, integrating self-service kiosks, digital ordering, digital payments, kitchen operations technology and rapid pickup capabilities.

Wendy's has been systematically rolling out digital menu boards across its drive-thru network, installing digital menu boards at more than 300 locations in 2024 alone. The company has committed approximately $20 million to deploy digital menu boards across all US company-operated restaurants by the end of 2025.

Copyright © 2026 Coresight Research. All rights reserved.

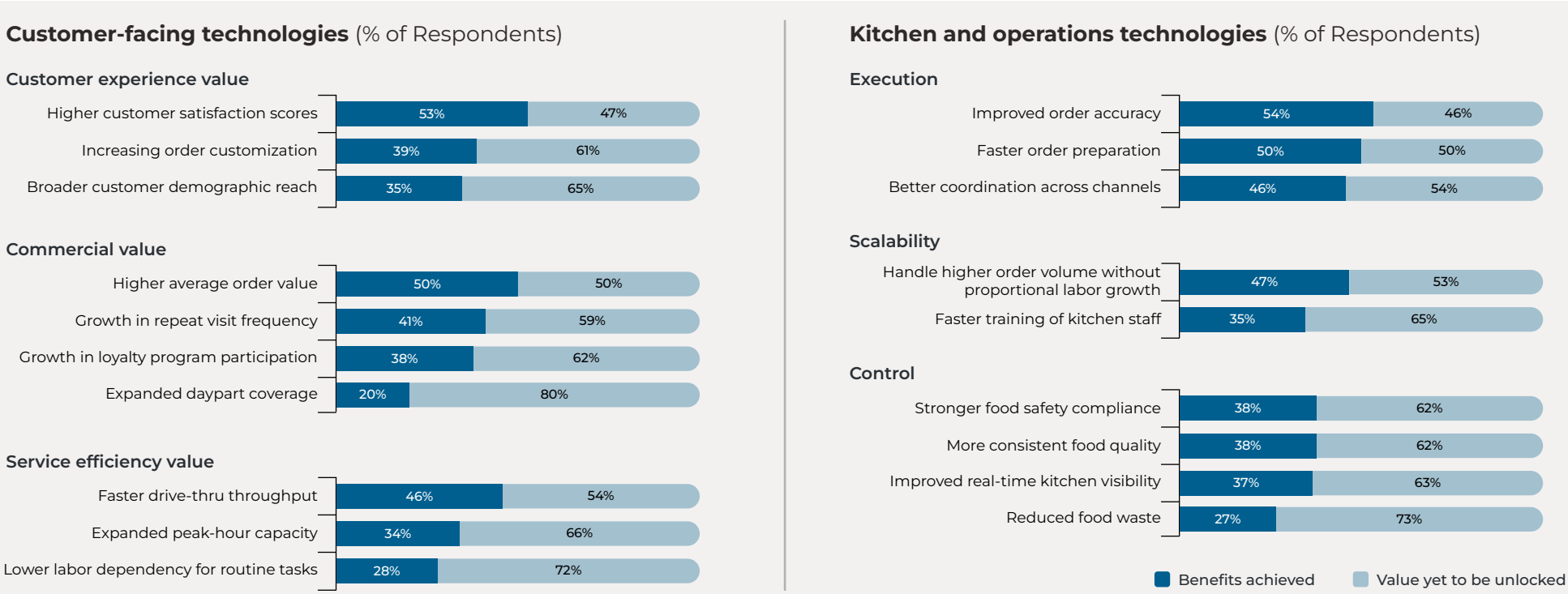
3 Technology Investment Is Delivering Measurable Returns, but Significant Value Remains Untapped

QSR operators have seen measurable improvements from both customer-facing and kitchen and operations technologies. The top reported benefits include:

- **Improved order accuracy (54%)**
- **Higher customer satisfaction (53%)**
- **Higher average order values (50%)**
- **Faster order preparation (50%)**

Taken together, the results show that technology is creating value across customer experience, business performance and restaurant execution, but that value is not yet pervasive. Even for the strongest-performing outcomes, nearly half of operators have yet to realize the available benefit. The greatest headroom appears in **expanded daypart coverage (20%), reduced food waste (27%) and reduced reliance on labor for routine tasks (28%).**

Figure 3.
First-Phase Investment: Value Delivered, Opportunity Remaining (% of Respondents)



Base: 147 US-based QSR executives highly familiar with restaurant technology solutions and serving as key decision-makers or influencers of restaurant technology decisions.
Source: Coresight Research

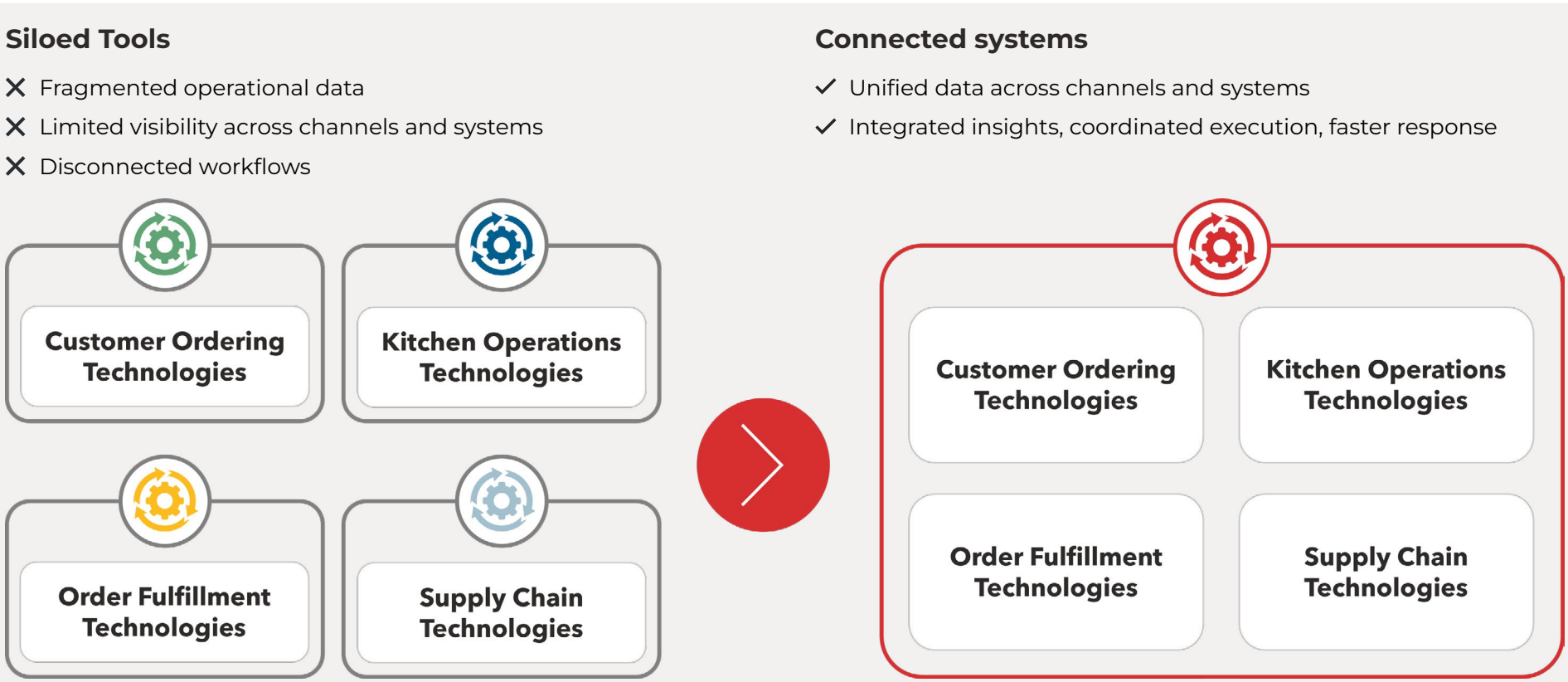
Copyright © 2026 Coresight Research. All rights reserved.

Unlocking the next level of value from technology investment requires operators to look beyond the performance of individual technologies as restaurant outcomes are generated across interconnected activities:

- Activities spanning ordering, payment, kitchen execution, and fulfillment shape customer satisfaction.
- Activities spanning demand planning, inventory management, staffing, and kitchen operations drive operational efficiency.

When point solutions operate independently rather than as a connected system, data and workflows can become fragmented. Improvements in one activity do not carry through the broader workflow. As a result, connecting siloed technology capabilities enables information and actions to flow across operational handoffs, helping operators translate gains in individual tasks into broader, more consistent improvements.

Figure 4.
From Siloed Technologies to a Connected QSR Operations System



Source: Coresight Research

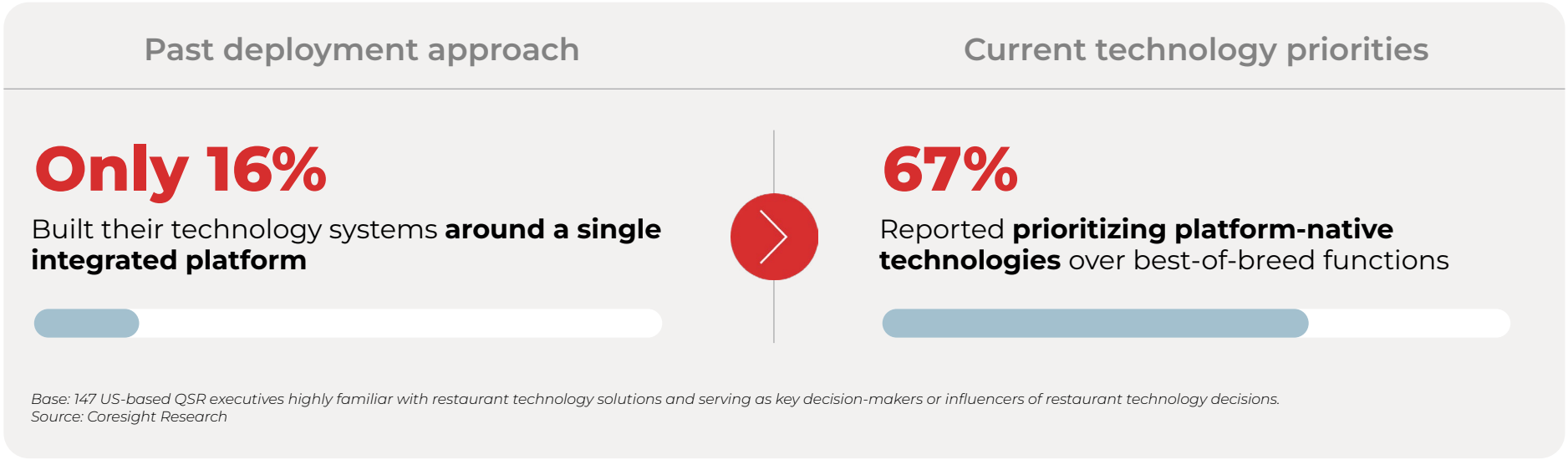
Copyright © 2026 Coresight Research. All rights reserved.

Technology Investment Is Shifting Toward Building Integrated Systems

Historically, QSR technology investment has largely focused on point solutions designed to address specific operational needs, from ordering and payment to food quality, service speed, fulfillment and labor productivity. Most QSRs have been adding solutions only as operational needs arose, and this incremental approach has contributed to fragmented technology environments: **84% of surveyed QSR operators** describe their past technology adoption as incremental, while just **16%** took an integrated approach.

That model is changing as operators seek greater value from their technology investments. **Today, 67% of surveyed QSR operators prioritize platform-native technologies over best-of-breed functionality**, reflecting a growing emphasis on integration and connected workflows. By enabling systems to share real-time information and coordinate activities across ordering, restaurant execution and fulfillment, integrated technology environments can help operators improve speed, consistency and execution across the restaurant.

Figure 5.
From Point Solutions to Connected Technology Environments



Base: 147 US-based QSR executives highly familiar with restaurant technology solutions and serving as key decision-makers or influencers of restaurant technology decisions.
Source: Coresight Research

Copyright © 2026 Coresight Research. All rights reserved.

4 To Unlock Additional Value, QSR Operators Are Reorienting Technology Around Connected Workflows

QSR success depends on driving excellence across the following four critical operating areas.

Operating Area	Objective	Enabling Technologies (Not Exhaustive)
A **Customer Engagement and Ordering**	Deliver a consistent, low-friction customer experience that enables convenient ordering, accurate ordering intake and personalized engagement across every channel.	POS platforms; digital menu boards; mobile ordering applications; self-order kiosks; customer loyalty platforms; drive-thru AI and voice-ordering systems; integrated payment solutions
B **Kitchen and restaurant operations**	Coordinate order intake, kitchen production and frontline labor to deliver consistent food quality and increase productivity.	KDSs; order intake and management platforms; handheld devices; labor management systems; industrial kitchen control systems; equipment monitoring and IoT platforms; AI demand forecasting solutions
C **Fulfillment and delivery coordination**	Synchronize preparation, capacity and handoffs across channels so every order reaches the customer on time.	Order intake and management platforms; KDSs; handheld devices; smart pickup cabinets; delivery dispatch platforms
D **Supply chain visibility and traceability**	Maintain end-to-end visibility into inventory location, temperature control and food conditions to protect food safety, improve product availability and reduce waste.	Barcode scanners and radio-frequency identification (RFID) technologies; environmental sensors; Inventory management platforms; food traceability platforms; RFID tags, 2D barcodes and intelligent labels

For QSR operators, operational excellence requires connected workflows that break down process silos and coordinate activities across teams. Integrated technology systems enable these workflows by sharing information and directing actions to the right people at the right time. The following sections outline priority workflows and enabling technologies across each of the four operating areas.

Copyright © 2026 Coresight Research. All rights reserved.

A. Customer Engagement and Ordering

The ordering experience has become an important determinant of customer satisfaction and restaurant performance. Customers expect convenient, accurate and consistent interactions across mobile applications, self-service kiosks, drive-thru lanes and front counters. As ordering channels expand, restaurant operators are managing a customer journey that extends from menu discovery and order placement through payment, kitchen handoff and posttransaction engagement.

Connected Workflows	How Technology Enables the Connected Workflows
Consistent discovery across channels Menu information, pricing, promotions and product availability remain consistent across ordering touchpoints, while customer preferences and loyalty benefits carry across digital and in-restaurant interactions.	• The **POS platforms** (e.g., Toast, Oracle Simphony) maintain consistent product, pricing and transaction information. • **Digital menu boards, self-order kiosks and customer-facing displays** (e.g., Elo) use this information to create a consistent ordering experience across touchpoints. • **Customer loyalty platforms** (e.g., Paytronix) build on customer and transaction data to deliver AI-powered recommendations, personalized promotions and more relevant experiences.
Convenient ordering, customization and payment Customers move through food selection, order customization, loyalty redemption and payment in a seamless experience. The workflow coordinates interactions with mobile, kiosk, counter and drive-thru without creating separate processes for each channel.	• **Mobile-ordering applications** (e.g., Olo), **self-order kiosks** (e.g., Elo), and **drive-thru AI and voice-ordering systems** (e.g., SoundHound AI) capture customer selections and modifications. • The **POS platforms** validate each order and apply available loyalty benefits, while **integrated payment software and devices** (e.g., Toast, Elo, Zebra, Oracle Payments) securely complete the transaction.
Accurate order confirmation and restaurant handoff Complete order information, including modifications and fulfillment requirements, remains visible from order placement through preparation and pickup. Customers and restaurant employees receive clear confirmation and timely updates as the order progresses.	• The **POS platforms** coordinate order capture and routing with the **KDS software** (e.g., QSR Automations, Toast, Oracle). • **Drive-thru displays and in-store POS displays** (e.g., Elo) allow customers to review and verify their selections. As production progresses, the **KDS software** sends order updates to **the order intake and management platforms** (e.g., Olo, Toast, Oracle Simphony), enabling restaurants to communicate progress across customer touchpoints.

Copyright © 2026 Coresight Research. All rights reserved.

Continuous customer recognition and engagement
Each customer interaction contributes to a more relevant future experience. Restaurants recognize returning customers, maintain loyalty activity across channels and use prior engagement to update offers and future communications.

- **Customer loyalty platforms** (e.g., Paytronix, PAR Punchh) consolidate customer profiles, transaction data and engagement histories across locations, enabling restaurants to identify behavioral patterns and deliver more personalized engagement.

Case Study

McDonald's—Scaling AI-Powered Personalization and Digital Experimentation

Building on a decade of investment in digital menu boards, self-order kiosks, mobile ordering and delivery integration, McDonald's is now leveraging AI-powered personalization and large-scale digital experimentation. The company dynamically tailors menu recommendations based on contextual factors such as weather and time of day, while continuously A/B testing offers, content and ordering experiences across digital channels to improve customer engagement and sales performance.

B. Kitchen and Restaurant Operations

Effective restaurant execution increasingly depends on coordinating orders, labor, equipment and production. As digital channels generate higher and more variable order volumes—and labor constraints pressure productivity and margins—operators need standardized workflows that maintain food quality, improve order accuracy and support timely fulfillment across channels.

Connected Workflows	How Technology Enables the Connected Workflows
Unified order intake and production sequencing Orders from the counter, drive-thru, kiosks and digital channels enter a coordinated production process. Kitchen teams see a complete view of demand and sequence orders based on preparation requirements, fulfillment method and service timing.	• The **order intake and management platforms** (e.g., Olo, Toast, Oracle Simphony) consolidate orders across channels. • **Counter POS terminals and handheld order-taking devices** (e.g., Elo, Zebra, Toast) capture in-restaurant orders and feed them into the food production flow. • **KDS software** (e.g., Crunchtime Kitchen, Toast) receives these orders and coordinates production priorities across kitchen stations.

Copyright © 2026 Coresight Research. All rights reserved.

Standardized preparation and quality control Restaurants apply consistent preparation procedures across locations and shifts. Recipes, modifications and cooking requirements remain visible to employees throughout food production.	• **KDS software** (e.g., Crunchtime Kitchen, Toast) then translates orders into standardized preparation instructions on commercial kitchen displays (e.g., Elo) and highlight customer modifications. • **Industrial kitchen control systems and equipment monitoring/IoT platforms** (e.g., Middleby Open Kitchen) monitor equipment performance, cooking conditions and food-safety parameters.
Frontline labor management Staffing and employee activities are aligned with real-time demand. Store managers can adjust coverage as conditions change, while employees receive clear, actionable work plans—reducing unnecessary movement, manual coordination and repeated handoffs.	• **AI demand-forecasting tools** (e.g., Crunchtime, Restaurant365) capture signals such as historical sales, weather, local events and real-time transaction data to forecast food demand by location. • **Labor-management systems** (e.g., Zebra Workcloud, Crunchtime) translate real-time food demand into staffing requirements, employee schedules and labor deployment plans. • **Kitchen operational dashboard systems** visualize the plan by giving managers a shared, real-time view of workload, staffing and execution.

Case Study

McDonald's—Building AI- and IoT-Enabled Kitchen Operations

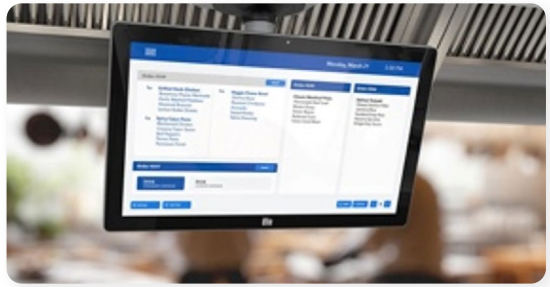
McDonald's is partnering with Google Cloud to build a digital foundation that connects AI and IoT technologies across restaurant operations. Real-time equipment monitoring, predictive maintenance and AI-driven insights help improve kitchen uptime, food quality consistency and crew productivity.

Case Study

Taco Bell—Applying AI to Restaurant Execution and Labor Management

Taco Bell has deployed AI voice ordering technology in approximately 890+ locations while expanding AI applications into labor scheduling and inventory management. Its Byte AI Restaurant Coach provides managers with real-time operational guidance, helping optimize staffing, inventory availability and restaurant performance.





Elo's KDS Hardware Platform: Connecting Tableside Ordering, POS, Self-Service and Food Preparation.
Source: Elo Touch Solutions

Copyright © 2026 Coresight Research. All rights reserved.

C. Fulfillment and Delivery Coordination

Digital ordering, off-premise demand and third-party delivery have expanded the number of ways customers receive restaurant orders. Fulfillment now connects kitchen production with drive-thru, in-store pickup, curbside pickup and delivery activities. Each channel introduces different timing requirements, handoff points and service expectations.

Connected Workflows	How Technology Enables the Connected Workflows
Coordinated fulfillment across channels Orders from drive-thru, counter, pickup, curbside and digital channels enter a shared production workflow. Kitchen teams sequence preparation based on order requirements, preparation times and promised handoff times, while fulfillment teams assemble, stage and route completed orders to the appropriate pickup point. Managers monitor the combined workload and adjust production priorities, station capacity and labor deployment as demand shifts across channels.	• **The order intake and management platforms** (e.g., Olo, Toast, Oracle Simphony) consolidate demand across channels and route orders into a shared production queue. • **Handheld devices** (e.g., Zebra, Elo) provide employees with customer handoff information throughout the restaurant. • **Delivery dispatch platforms** (e.g., Olo Dispatch) coordinate courier assignment and delivery handoff.
Order handoff Completed orders are assigned to the appropriate fulfillment channel, staged in designated pickup areas, and released when the customer or delivery courier arrives. Order confirmations, progress updates and pickup instructions direct each recipient to the correct handoff point, while restaurant teams monitor waiting orders and manage exceptions.	• **The order intake and management platforms** (e.g., Olo, Toast, Oracle Simphony) use order and transaction updates from the POS platforms and production-status updates from the KDS software to communicate progress through mobile applications, ordering websites and text messages. • **Smart pickup cabinets** (e.g., Apex Order Pickup Solutions) securely organize completed orders and provide controlled access to the appropriate recipient.

Case Study

Chick-fil-A—Reimagining Drive-Thru Fulfillment Workflows

Chick-fil-A has redesigned traditional drive-thru operations by equipping employees with handheld tablets to capture orders directly from customers in the queue. The company has also introduced dedicated service doors that allow employees to deliver completed orders directly to waiting vehicles, reducing bottlenecks and improving coordination between order-taking, food preparation and fulfillment activities.



Elo Mobile Restaurant POS Device: Transactions and Order Fulfillment from Anywhere

Copyright © 2026 Coresight Research. All rights reserved.

D. Supply Chain Visibility and Traceability

Supply chain performance influences product availability, food quality, waste and continuity across restaurant operations. QSR organizations often coordinate extensive networks of suppliers, distribution partners and restaurant locations. Limited visibility across those relationships makes it more difficult to anticipate shortages, verify product conditions and respond quickly when disruptions and changes to demand occur.

Connected Workflows	How Technology Enables the Connected Workflows
Reliable inventory visibility across the network Suppliers, distribution centers and restaurants maintain a common view of inventory that is on hand, in transit and consumed. Receipts, transfers and usage trigger replenishment across the network.	• **Barcode scanners, RFID readers and handheld mobile devices** (e.g., Zebra) capture inventory activity at receiving, storage and restaurant locations. • **Inventory management platforms** (e.g., Restaurant365, Crunchtime) consolidate this activity into stock levels, consumption patterns and replenishment requirements.
Traceable product history from source to restaurant Products are identified at their source and recorded as they move through supplier, distribution and restaurant handoffs. Connected lot, date, location and destination records enable operators to identify and isolate affected products quickly.	• **RFID tags, 2D barcodes and intelligent labels** (e.g., Zebra, Avery Dennison) assign products a unique digital identity and capture information at key handoffs. • **Food traceability platforms** (e.g., FoodLogiQ) connect these events into searchable product histories and support targeted recalls.
Continuous visibility into product condition Temperature-sensitive products are monitored during transportation, receiving, distribution and restaurant storage. Supply-chain and restaurant teams respond to condition exceptions and maintain a shared record of product handling throughout the cold chain.	• **Environmental monitoring sensors** (e.g., Zebra, Tive, Sensitech) track temperature, location, humidity and other shipment conditions. Real-time alerts identify excursions.

Case Study

CHIPOTLE MEXICAN GRILL

Chipotle—Enhancing Supply Chain Visibility with RFID Technology

Chipotle is rolling out RFID technology across its network of more than 4,000 restaurants to improve inventory visibility, traceability and operational efficiency. Suppliers attach RFID-enabled case labels to ingredient shipments, allowing Chipotle to capture serialized product information as ingredients move from suppliers through distribution and into restaurants. The system enhances inventory visibility, strengthens traceability during food safety events and reduces manual receiving processes.

Copyright © 2026 Coresight Research. All rights reserved.

Enhancing inventory visibility and food traceability

Zebra has the solutions that today's QSR operators need to meet new FDA FSMA requirements and growing customer demands for transparency. Our enterprise-grade devices and printers are game-changing inventory management solutions and are ideally suited for the rigors of quick-service restaurants.



Mobile computers

Give your staff the ability to quickly bust lines and process customer transactions, increase inventory accuracy, prevent stockouts by auto-replenishing high-demand items and pause orders for goods that aren't moving with Zebra's line of purpose built mobile computers.



Printers

From compact desktop and mobile printers to our industrial line, Zebra printers make it easy to print food rotation labels on demand that include critical data, including prep day, use-by dates, and more, to prevent cross-contamination or foodborne illness.



Handheld RFID readers

Turn any mobile computer into a powerful RFID solution specially designed for inventory processes. Increase speed and efficiency in taking and locating critical items.



Enterprise tablets

Zebra's tablets are the perfect replacements for the consumer-grade tablets that frequently struggle in the fast-paced QSR environment. These tablets are ideal for everything from line busting to accessing real-time inventory information.



Supplies

The Zebra portfolio of supplies includes RFID labels for traceability, linerless labels for takeout, and dissolvable labels for food prep to meet the requirements of your restaurants applications.



Fixed RFID readers

You'll always know what inventory is coming in—without human intervention with Zebra's fixed RFID solutions. Get the benefits of high-powered, highly accurate RFID tracking at critical points in your operations.

Zebra Solutions for Supply Chain Visibility and Traceability
Source: Zebra Technologies

Copyright © 2026 Coresight Research. All rights reserved.

5 Building the Foundation for Connected QSR Operations at Scale

Successful Deployment Requires Technology, Business and People Alignment

Scaling connected operations involves a broader set of decisions than selecting and installing new tools.

- **Connected technology foundation**—Define a clear end-state technology blueprint that reduces the technical debt created by disconnected legacy systems and supports interoperability, shared data and scalable integration across locations. The architecture should center on software that supports the operating model and connects restaurant data through a shared platform. Compatible hardware then extends these capabilities into physical workflows, connecting employees, customers and kitchen equipment across the restaurant. Strong data standards, privacy controls, cybersecurity practices and technology governance enable the connected system to operate reliably at scale.
- **Business alignment**—Set a clear technology vision and identify the operational workflows that offer the greatest potential value. Use defined performance measures and ROI evidence to prioritize investments and build internal support. Select technology vendors based on their role within the target architecture, then develop partnerships for implementation, integration and continued improvement.
- **People and adoption**—Treat frontline usability as a core requirement when evaluating and designing technology. Prepare employees through change management, practical training and skills development. Update operating processes so that technology supports how employees perform their work, and use frontline feedback to refine tools, functionality and workflows over time.

Industry Insight

"Right now, there is no single consolidator bringing data from all these points together; each area remains a separate silo. Larger QSR companies are developing their own approaches to connect the data, while smaller operators are more likely to buy an all-in-one offering from a provider such as Toast or Square."

"I generally start with software: it has to support how the operation runs and provide links to centralized data. Then select hardware that can run those applications and be supported across the markets where the business operates. The third consideration is wraparound service providers, including integrators, hardware support and help-desk services."



Rob Grimes
Founder and CEO
International Food and Beverage Technology Association (IFBTA)

Copyright © 2026 Coresight Research. All rights reserved.

Figure 6.
Critical Technology Deployment Success Factors

50%+ **of the leading QSR operators identified below as critical technology deployment success factors.**

Connected Tech Foundation

Standardizing technologies across locations

Strong integration with existing systems

Business Alignment

Clear ROI evidence to build internal support

Close partnership with technology vendors

People & Adoption

Strong change management and staff training

Designing new tech deployments around frontline staff usability

Base: 147 US-based QSR executives highly familiar with restaurant technology solutions and serving as key decision-makers or influencers of restaurant technology decisions.
Source: Coresight Research

QSR Lessons Extend Across the Broader Service Industries

The operating principles examined in this report extend to other high-volume, service-oriented industries, including retail, hospitality, travel and entertainment. Organizations in these sectors must coordinate customer demand, time-sensitive service, frontline employees, inventory and physical assets. Connected technologies can help streamline customer interactions, improve operational visibility and support more consistent execution. For example:

- Retailers use unified commerce platforms and real-time inventory data to coordinate purchases, fulfillment and returns across stores and digital channels.
- Grocers connect demand forecasting, replenishment and workforce-management tools to improve product availability and respond to changing demand.
- Hotels use digital concierge kiosks and in-room ordering applications to simplify guest requests and coordinate service delivery.
- Stadiums, entertainment venues, airports and food halls use mobile ordering, real-time order tracking and smart pickup solutions to manage concentrated demand and coordinate fulfillment across multiple locations.

Across these industries, individual tools create greater value when they connect customer demand, operational workflows, employees and physical equipment. Organizations that align technology with business priorities and frontline needs can translate digital investment into faster, more consistent service and more adaptable operations. As customer expectations and service models evolve, the ability to connect efficiency with better experiences will become an increasingly important competitive advantage.

Copyright © 2026 Coresight Research. All rights reserved.

What We Think

The QSR industry has reached a new stage of technology adoption and deployment. Technologies such as POS platforms, KDSs, digital ordering channels, handheld devices and self-service kiosks have become the operational foundation of the modern restaurant. As a result, technology investment decisions are increasingly shifting away from basic deployment and toward optimization, integration and workflow enablement.

Looking ahead, leading operators will focus more on improving how technologies work together to support operational objectives. Whether the goal is improving order accuracy, increasing labor productivity, accelerating fulfillment or strengthening supply chain visibility, technology solution adoption is rarely the objective itself. The most successful organizations will align technology investments with clearly defined operational priorities, using data, automation and AI to continuously improve execution across the restaurant value chain.

Copyright © 2026 Coresight Research. All rights reserved.

Implications for QSR Operators

- **Technology optimization will become a greater priority than deploying more technologies.**
  Core technologies such as POS systems, digital ordering platforms, digital kiosks and KDSs have become foundational infrastructure, shifting investment priorities toward improving utilization, integration and operational impact.

- **Operational workflows—not technologies—will increasingly drive investment decisions.**
  Leading operators will begin with clearly defined business objectives, such as improving throughput, labor productivity or order accuracy, before determining which technologies best support those outcomes.

- **AI will increasingly be embedded into existing restaurant workflows.**
  The next wave of adoption will focus on integrating AI into ordering, forecasting, labor scheduling, inventory management and operational decision-making.

- **Connected data ecosystems will become a competitive differentiator.**
  Restaurants that successfully connect customer, operational and inventory data across ordering, kitchen, fulfillment and management systems will be better positioned to improve visibility and decision-making.

- **Supply chain visibility will become an extension of restaurant operations.**
  Investments in RFID, traceability, environmental monitoring and inventory visibility will help operators improve food safety, reduce waste and strengthen operational resilience.

- **Real-time visibility will support more proactive restaurant management.**
  Greater access to operational data across labor, inventory, equipment and fulfillment workflows will allow managers to identify issues earlier and make faster, more informed decisions.



Copyright © 2026 Coresight Research. All rights reserved.

Notes and Methodology

Data and conclusions in this report are as of August 25, 2026.

Data in this report are based on an online survey conducted by Coresight Research between June 26 and July 20, 2026, covering US-based QSR executives. Results have a theoretical maximum margin of error of ±8% for the full sample (N=147) and ±14% for each restaurant-segment subsample at a 95% confidence level.

Respondents met the following screening criteria:

- Company scope: US-based QSR organizations operating at least 200 restaurant locations
- Restaurant segment: Organizations operating in one of three target QSR segments—traditional QSR/drive-thru, beverage/snack/dessert or walk-up/choose-your-ingredients
- Technology familiarity: Respondents reporting being either extremely familiar or very familiar with their organization's deployment of restaurant technology solutions
- Technology deployment maturity: Organizations continuously optimizing technologies deployed at scale or actively expanding proven technologies across additional locations
- Decision-making authority: Respondents serving as final decision-makers, shared decision-makers or strong influencers for in-restaurant technology decisions

Respondent profile:

- Seniority: Division President/GM, EVP/SVP/VP, and Senior Director/Director roles
- Functional responsibilities: Involvement in restaurant operations, restaurant technology/IT/digital, customer experience and/or finance functions

Visit our methodology page to read more context for understanding the results of Coresight Research surveys.

Copyright © 2026 Coresight Research. All rights reserved.



About Coresight Research Custom Reports

Coresight Research Custom Reports are produced as part of commercial partnerships with leading firms in the retail, technology and startup ecosystems. These Custom Reports present expert analysis and proprietary data on key topics in the retail, technology and related industries, and enable partner companies to communicate their brand and messaging to a wider audience within the context of brand-relevant research.

This report is produced and made available to nonsubscribers of Coresight Research in partnership with Zebra Technologies and Elo Touch Solutions.

Jiayue Zhao
Strategy Consultant

Steven Winnick
Vice President - Innovator Services

New York • Hong Kong • Lagos • London • Mangaluru (India) • Shanghai

coresight.com

To discuss our research or partnership opportunities, email contactus@coresight.com

About Zebra Technologies & Elo Touch Solutions

Zebra Technologies is a leading provider of enterprise hardware, software and data-capture solutions that enable frontline operations across retail, logistics, healthcare and manufacturing. The company specializes in barcode scanning, RFID, mobile computing and workflow automation tools that improve inventory visibility and operational efficiency. Over time, Zebra has expanded beyond hardware into software and AI-driven analytics, positioning itself as a key enabler of "connected frontline" operations. Through a series of acquisitions—including Reflexis (workforce management) and antuit.ai (AI forecasting)—Zebra has built an integrated ecosystem that supports end-to-end store and supply chain digitization.

For more information, visit www.zebra.com

Elo Touch Solutions, now part of Zebra Technologies, provides software-agnostic interactive technology solutions spanning POS, self-service, payments, kitchen displays, digital signage and mobile workflows across customer-facing and operational environments.

For more information, visit www.elotouch.com

Copyright © 2026 Coresight Research. All rights reserved.