

The Great Restaurant Resurgence



POS and digital ordering data indicates a sustained recovery for the Quick Service and Fast Casual Restaurant segments after re-opening, across in-store & digital channels.

Qu's emergence as a technology pioneer has led to 5X growth in gross merchandise value (GMV) processed on our platform between April 2020 and May 2021.

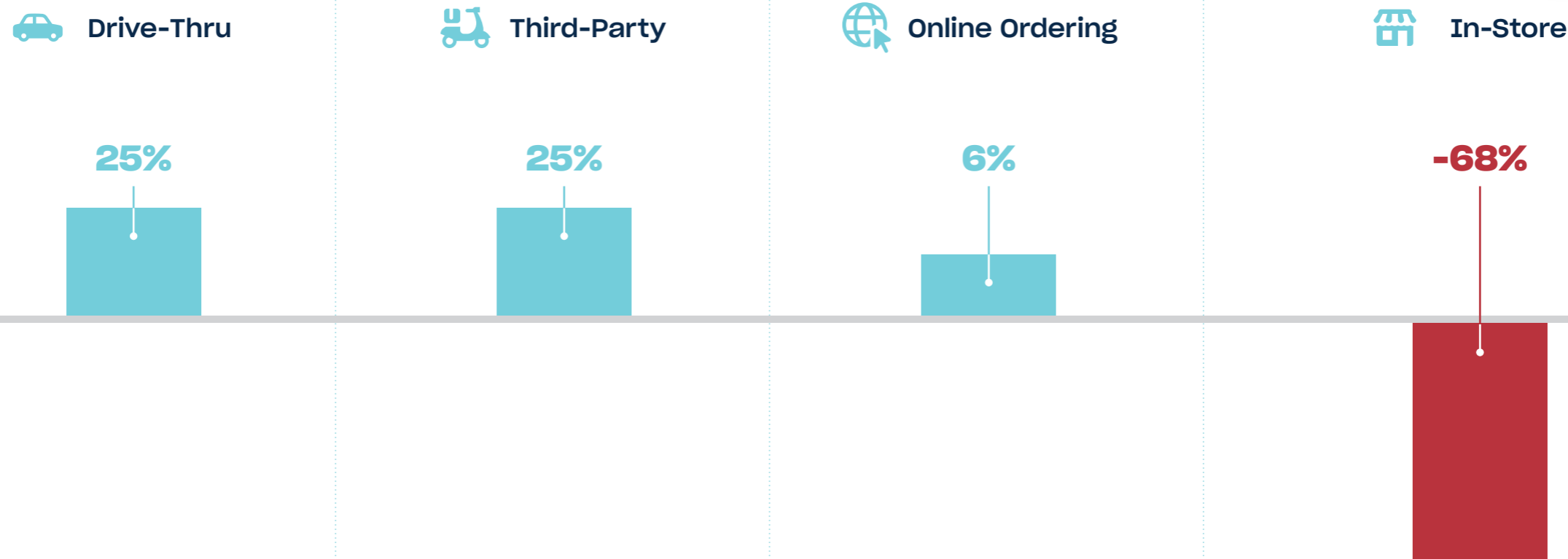


Early Pandemic Impacts (March-April 2020)

Clearly in-store dining took the biggest hit in the early pandemic months, as we saw the growth of Drive-Thru and Third-Party Delivery services with mass closures underway.

Qu had a total 50% drop in total order volume during these months.

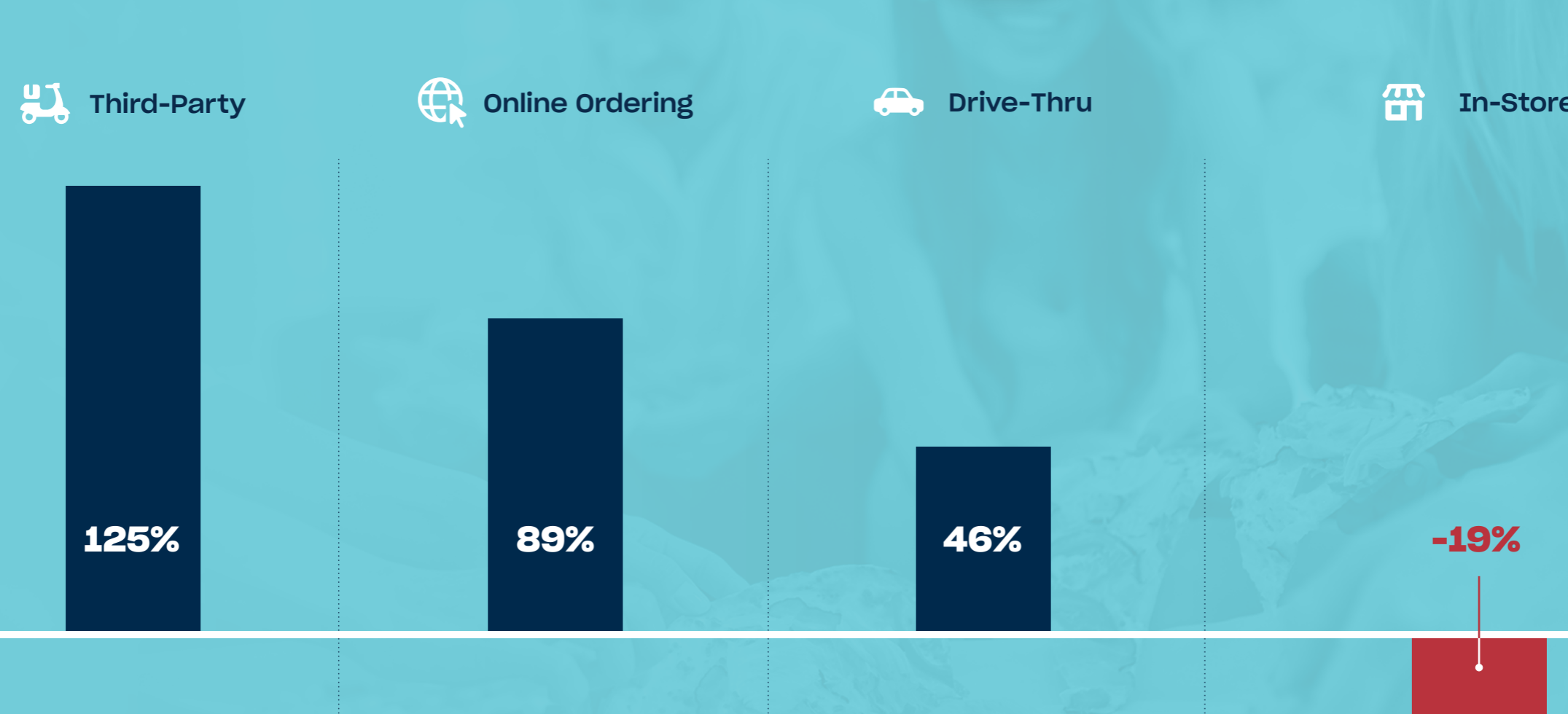
50% Drop
in total order volume



Stabilization by June 2020 Pandemic Impacts Plateau

Sales returned to even, signaling an almost full recovery when decline of sales processed on the Qu platform shrunk from -50% to -1% in June, primarily due to continued growth of Third-Party, Online Ordering, and Drive-Thru— while 26% of stores remained closed.

1% Drop
in total order volume

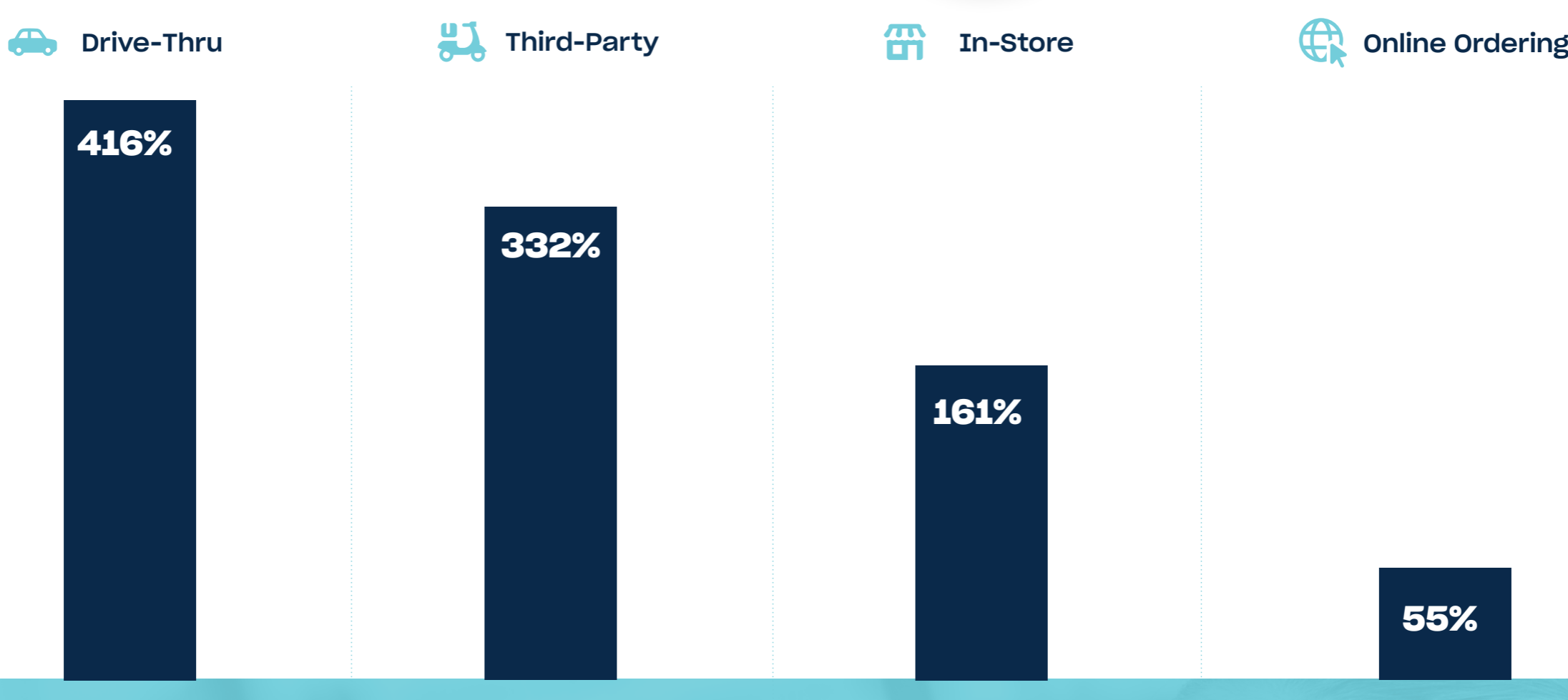


Recovery Trends: Sales Growth By Order Channel (July 2020 – June 2021)

Drive-Thru experienced the largest growth over the past year and In-Store bounced back in May as well.

Sales on Qu's platform increased dramatically thanks to store re-openings, new customers and stores added on Qu, and guests coming back to restaurants.

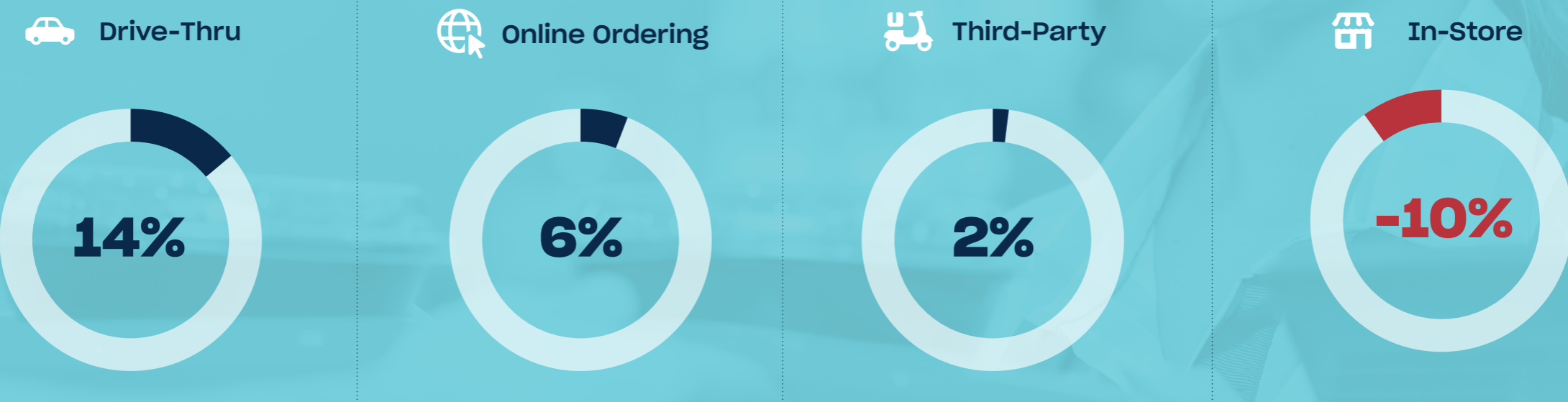
207% Increase
in total order volume



Recovery Trends: Changes in Order Channel Preference (July 2020 – June 2021)

Order volume as a percentage of sales shows the largest increases in preference for Drive-Thru, followed by Third-Party & Online Ordering, when comparing early and post-pandemic performance.

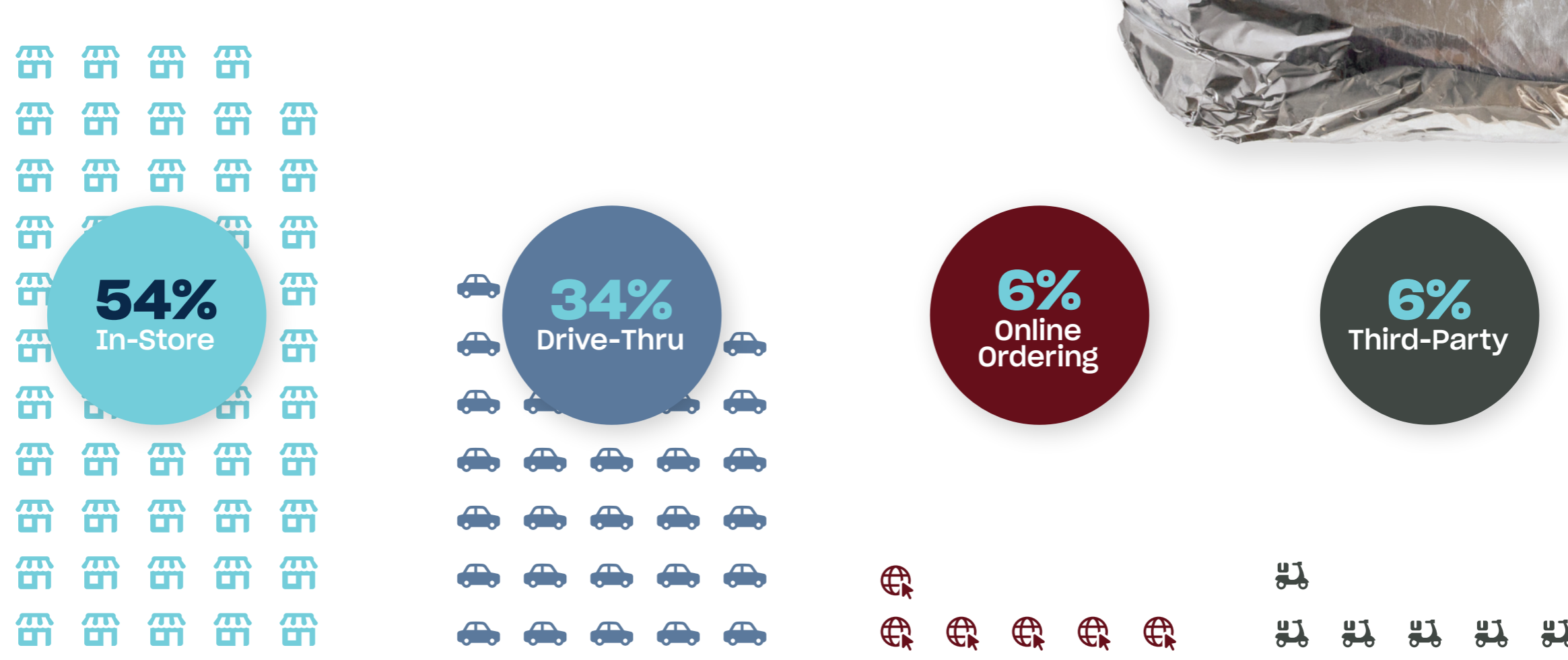
Restaurants begin to take digital transformation more seriously as channel mix continues to grow across digital, further complicating the tech stack management and composition.



*Based on Qu sales data from July 2020 to June 2021

Share of Total Sales – Channel Mix (June 2021)

In-store remains the top order channel by total order volume as of June 2021.



Explosion in Drive-Thru

Total Drive-Thru Sales

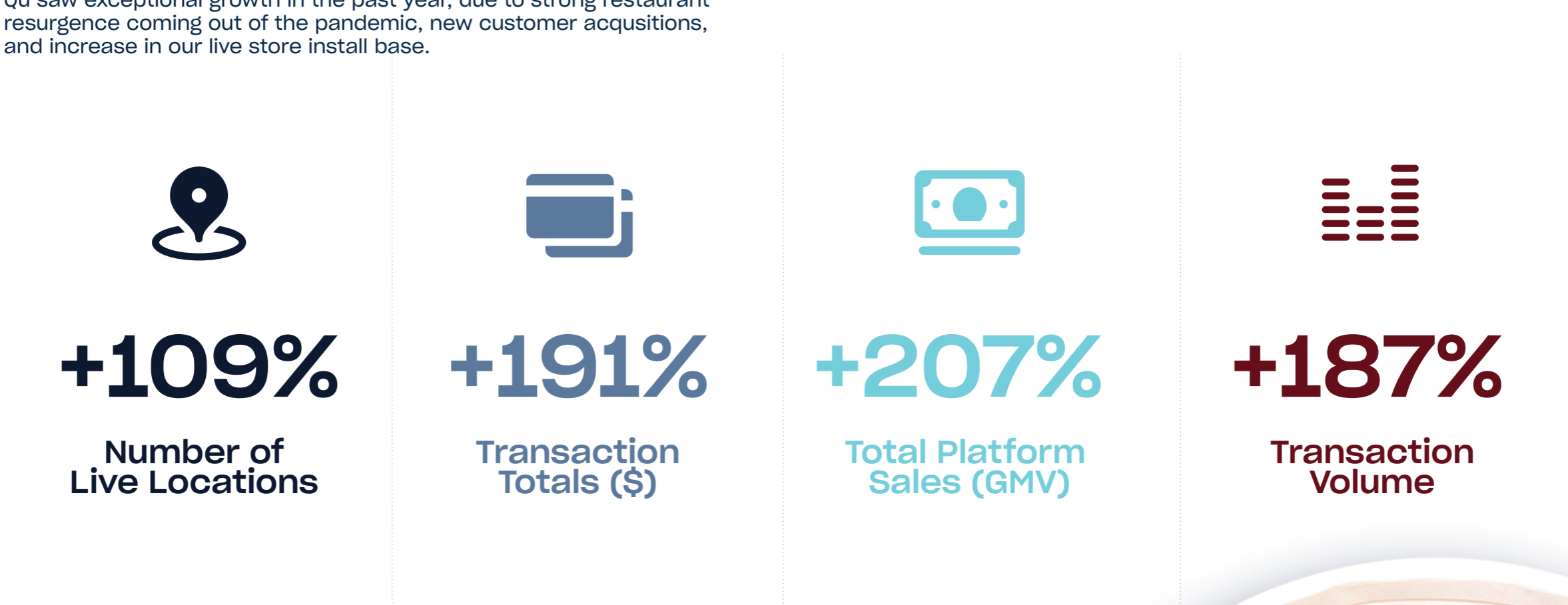
Drive-thru witnessed a 416% increase in volume over the course of the pandemic. Guests have displayed a sustained preference for the channel, even after re-openings.

416% Increase



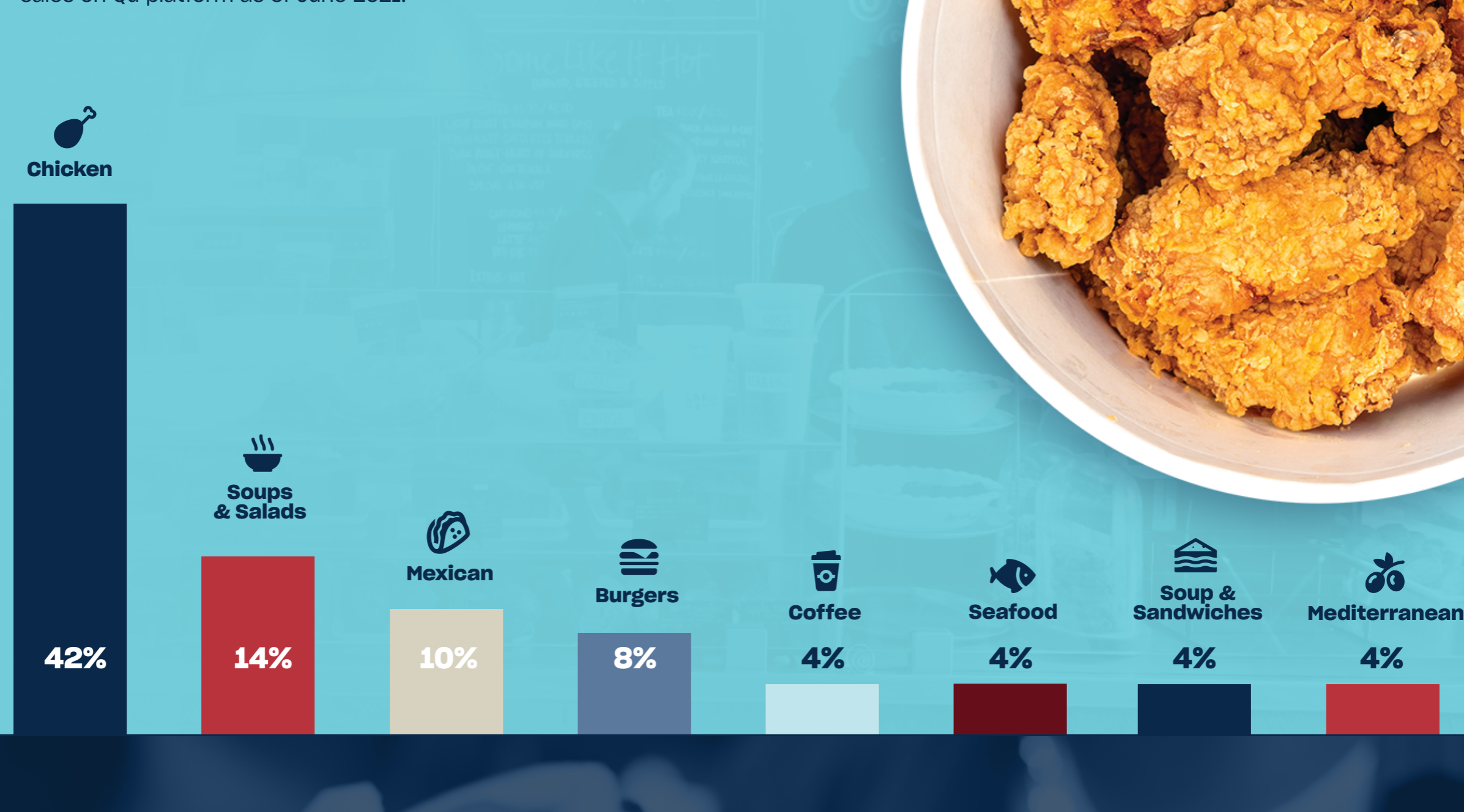
Qu Growth Year-over-Year (July 2020 – June 2021)

Qu saw exceptional growth in the past year, due to strong restaurant resurgence coming out of the pandemic, new customer acquisitions, and increase in our live store install base.



Food Segment Performance

Top 8 performing food segments as measured by percent of total sales on Qu platform as of June 2021.



Qu is your restaurant transformation partner delivering a unified commerce platform to drive healthier connections with guests across all your order channels.



www.qubeyond.com