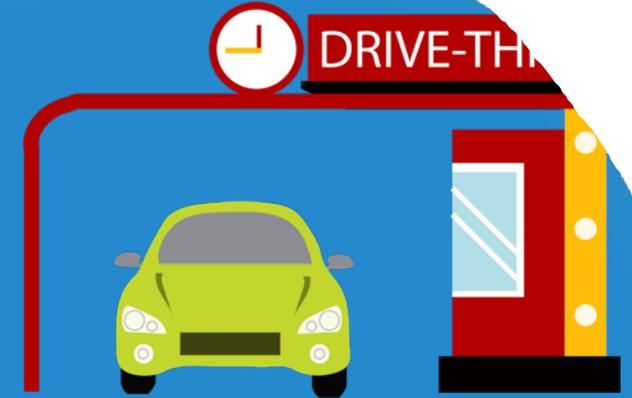




QUICK-SERVICE UNMASKED:

Revealing the latest trends & statistics
regarding quick service restaurants
performances amid COVID-19.



SEELEVEL HX ANNUAL DRIVE-THRU STUDY

The 2020 SeeLevel HX Annual Drive-Thru Study highlights drive-thru performances of ten quick-service restaurants. In addition, this annual benchmark study answers key questions regarding COVID-19 and its impact on the industry nationwide. Use these results to strategize how your brand will make important updates to stay compliant and maintain customer confidence in your restaurants.

This report only covers the key highlights of the study. To dig deeper into each question by chain, you can purchase the full study results for \$4,995.

PURCHASING THE STUDY GIVES YOU ACCESS TO:

- Detailed Study Findings
- Raw Data File in Excel
- Customizable Reporting Portal
 - Readout of the Data
- Your Brand Questions Answered by SeeLevel HX Experts

[PURCHASE THE FULL STUDY »](#)

BRANDS MEASURED

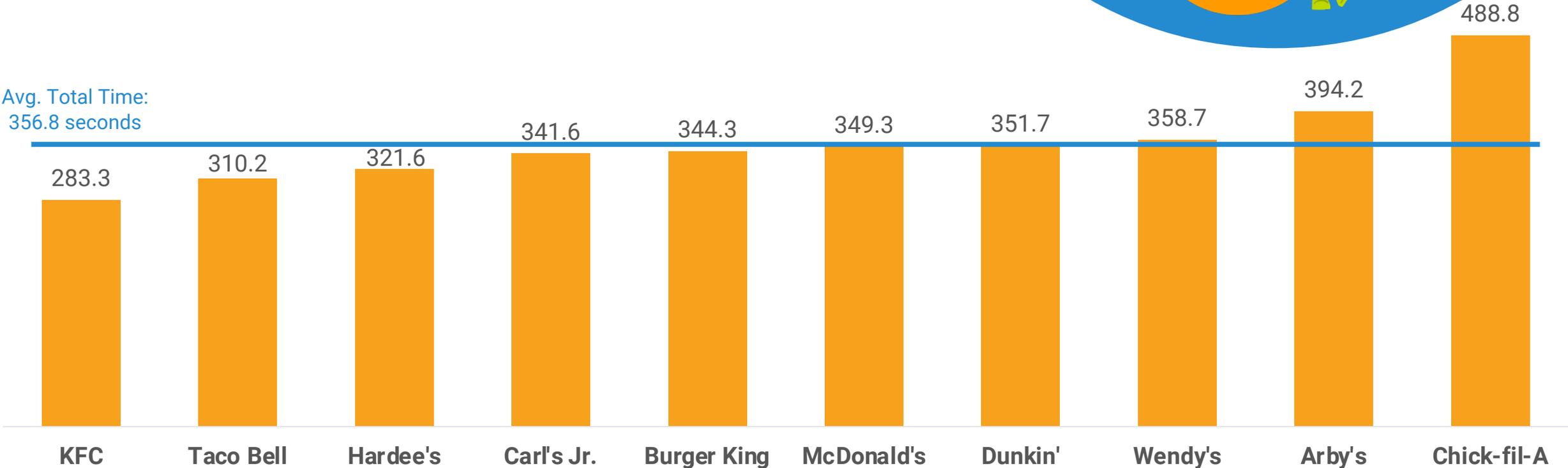


TOTAL TIMES RUNDOWN

KFC, McDonald's and Taco Bell were faster in 2020 than in 2019.



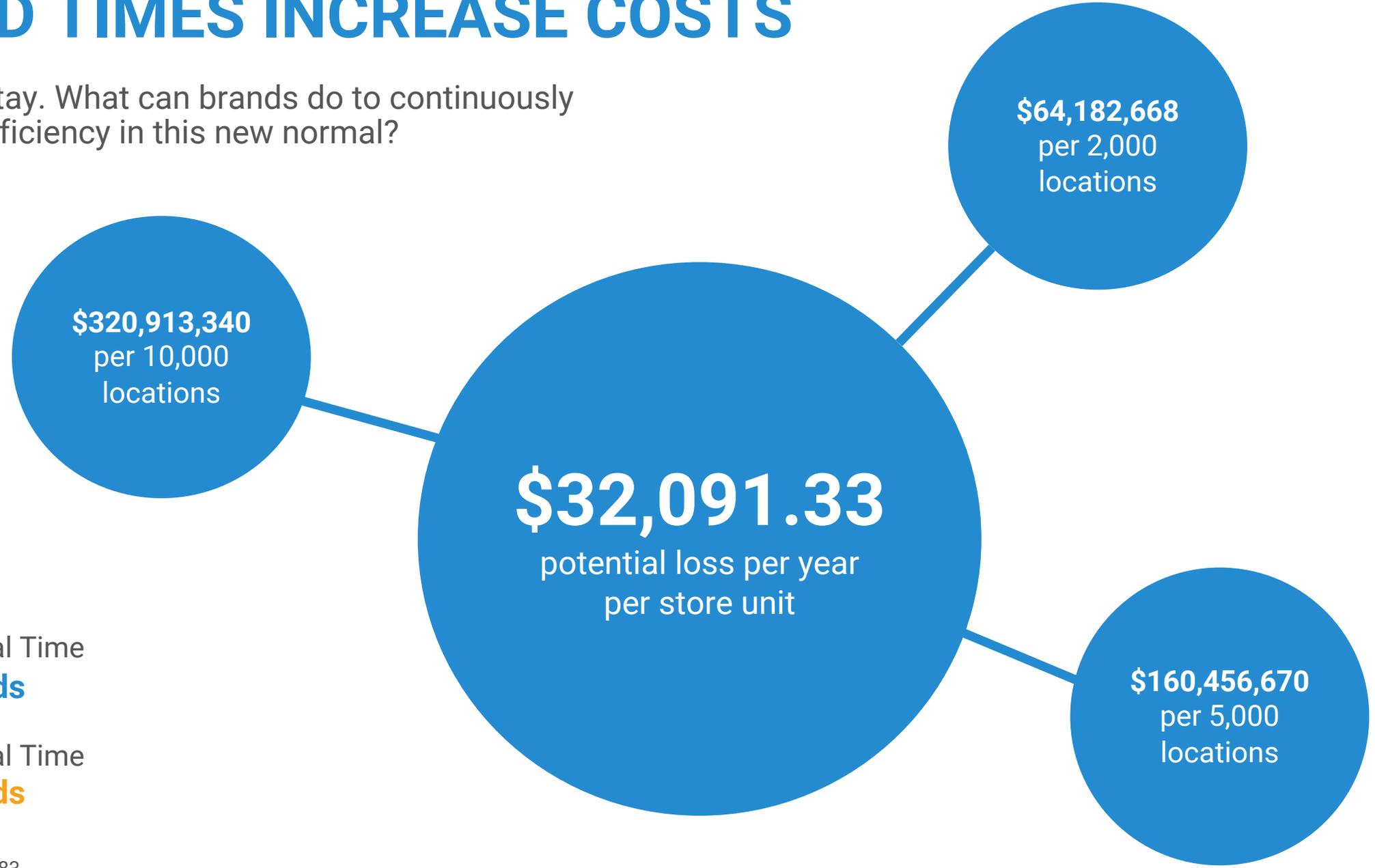
Avg. Total Time:
356.8 seconds



n=1,490
Total times by brand = wait times plus service times
*There was an average of 3.2 vehicles in line when a car pulled into a drive-thru.
2020 SeeLevel HX Annual Drive-Thru Study

INCREASED TIMES INCREASE COSTS

COVID-19 is here to stay. What can brands do to continuously improve speed and efficiency in this new normal?



2020 Avg. Total Time
356.8 seconds



2019 Avg. Total Time
327.0 seconds

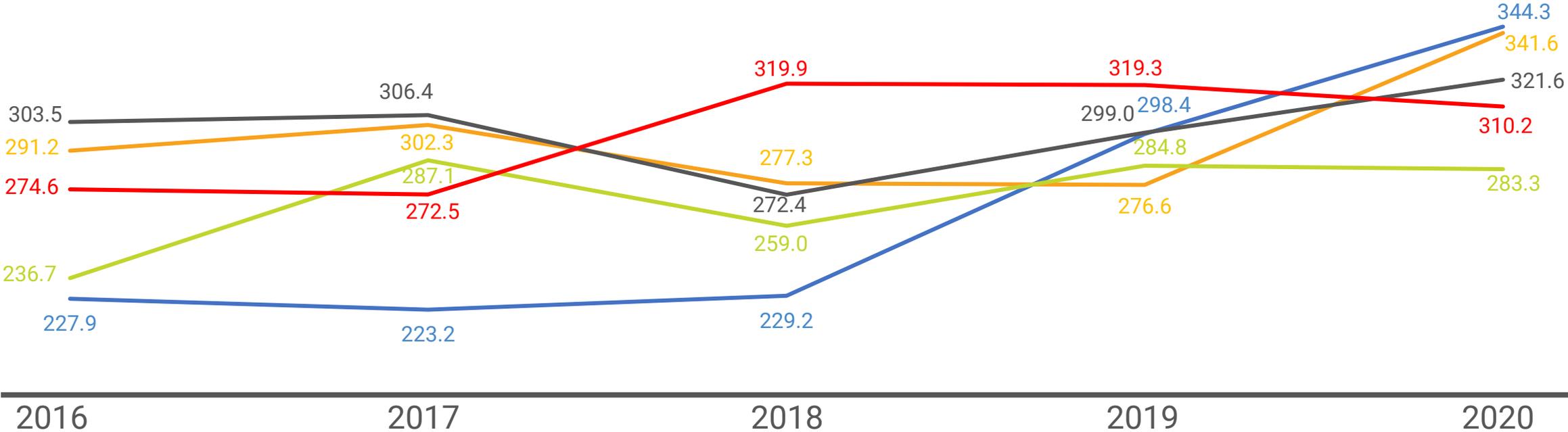
n=1,490

*Average meal cost estimated at \$6.83.
Total times by brand = wait times plus service times
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
Brands should use their own timing and average purchase point to determine their own potential loss.

REVEALING TOTAL TIMES OVER THE YEARS

What can your brand learn from KFC and Taco Bell to improve total times?

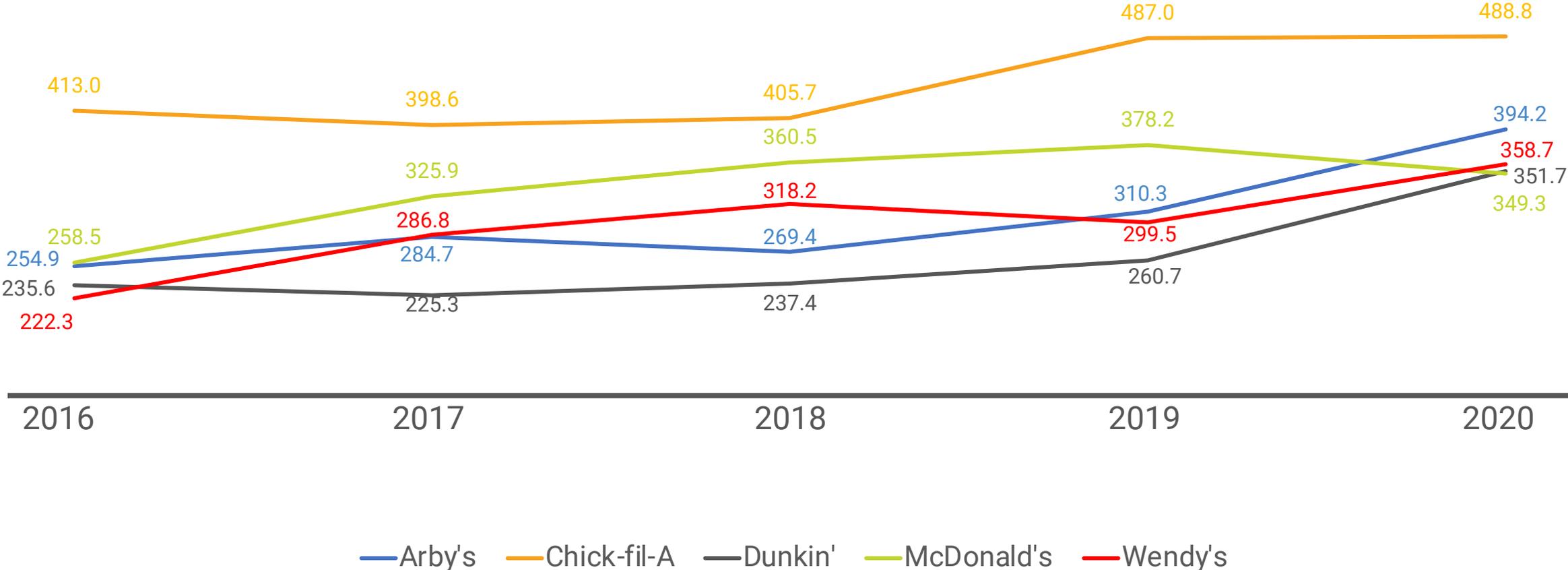


— Burger King — Carl's Jr — Hardee's — KFC — Taco Bell

Total times by brand = wait times plus service times
2020 SeeLevel HX Annual Drive-Thru Study

REVEALING TOTAL TIMES OVER THE YEARS

What can your brand learn from McDonald's to improve total times?

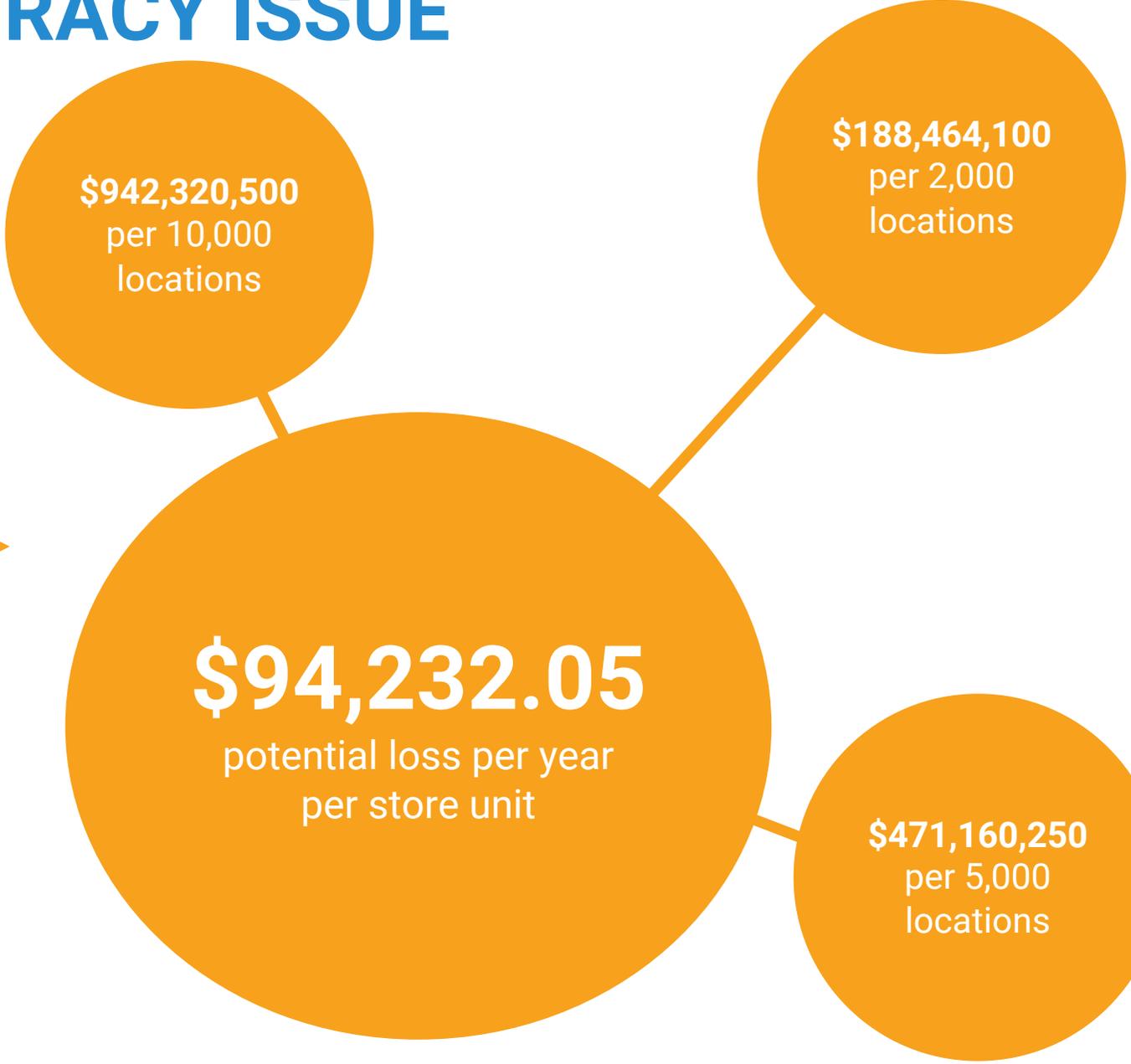
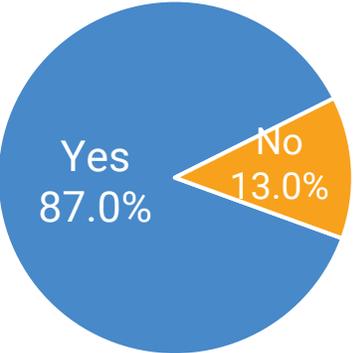


Total times by brand = wait times plus service times
2020 SeeLevel HX Annual Drive-Thru Study

THE \$94K ELUSIVE ACCURACY ISSUE

What is your restaurant brand doing to improve order accuracy and save on unnecessary costs?

Q20. Was your drive-thru order filled correctly and completely accurate?



 Service Time - Accurate Orders
231.9 seconds

 Service Time - Inaccurate Orders
281.0 seconds

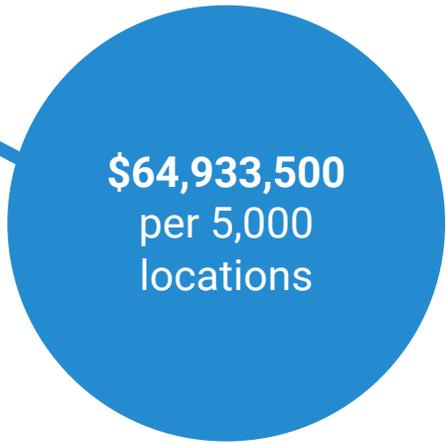
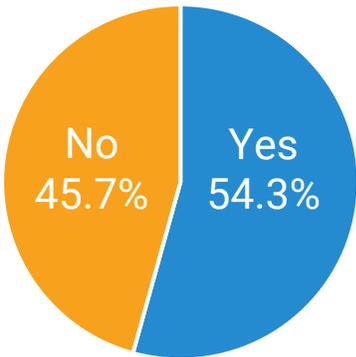
n=1,490 n yes = 1,297
*Average meal cost estimated at \$6.83.
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
Brands should use their own timing and average purchase point to determine their own potential loss.

REVEALING PRE-SELL MENUBOARD SAVINGS

Is \$26M in savings worth the pre-sell menuboard investment for your brand?

Q34. Was a "pre-sell" menuboard in place?



Total Time – with Pre-Sell
350.8 seconds



Total Time – without Pre-sell
364.0 seconds

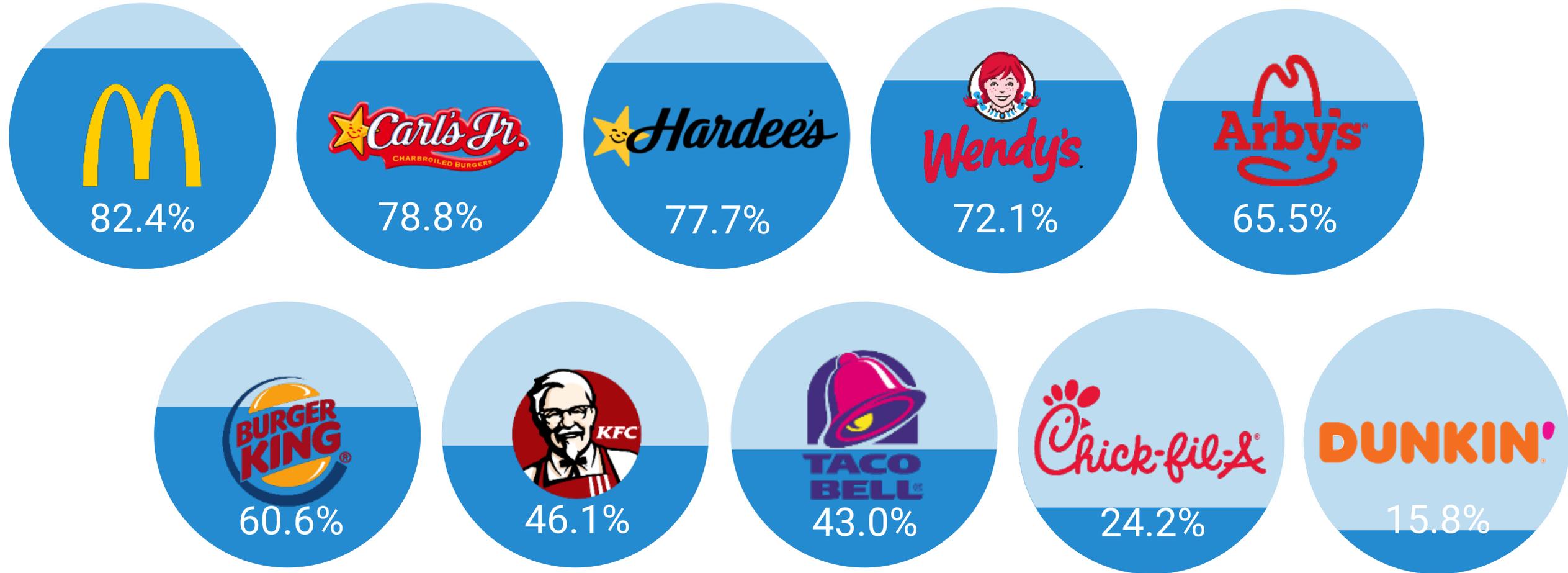
n=1,490 n yes= 809

*Average meal cost estimated at \$6.83.
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
Brands should use their own timing and average purchase point to determine their own potential loss.

PRE-SELL MENUBOARD PRESENCE BY CHAIN

Chick-fil-A and Dunkin' seem to have a different strategy than using pre-sell menuboard.



n=85 for Carl's Jr. and Hardee's

n=165 for Arby's, Burger King, Chick-fil-A, Dunkin', KFC, McDonald's, Taco Bell and Wendy's

Q34. Was a "pre-sell" menuboard in place?

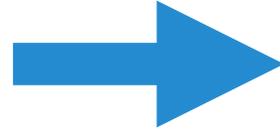
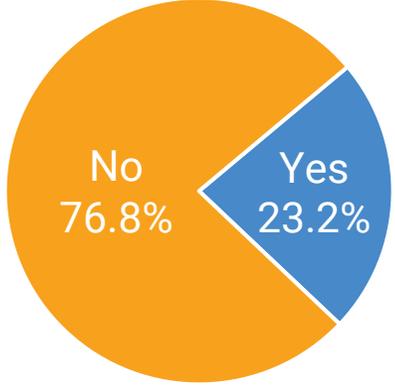
2020 SeeLevel HX Annual Drive-Thru Study

DIGITAL MENUBOARDS ARE PAYING OFF

This is the first year digital menuboard reduced total times.

Who's taking the lead and generating more ROI with digital innovation? [Purchase the full study for \\$4,995 to find out.](#)

Q35a. Was the primary menuboard a digital menuboard?



Service Time – with Menuboard
228.8 seconds



Service Time – without Menuboard
241.1 seconds

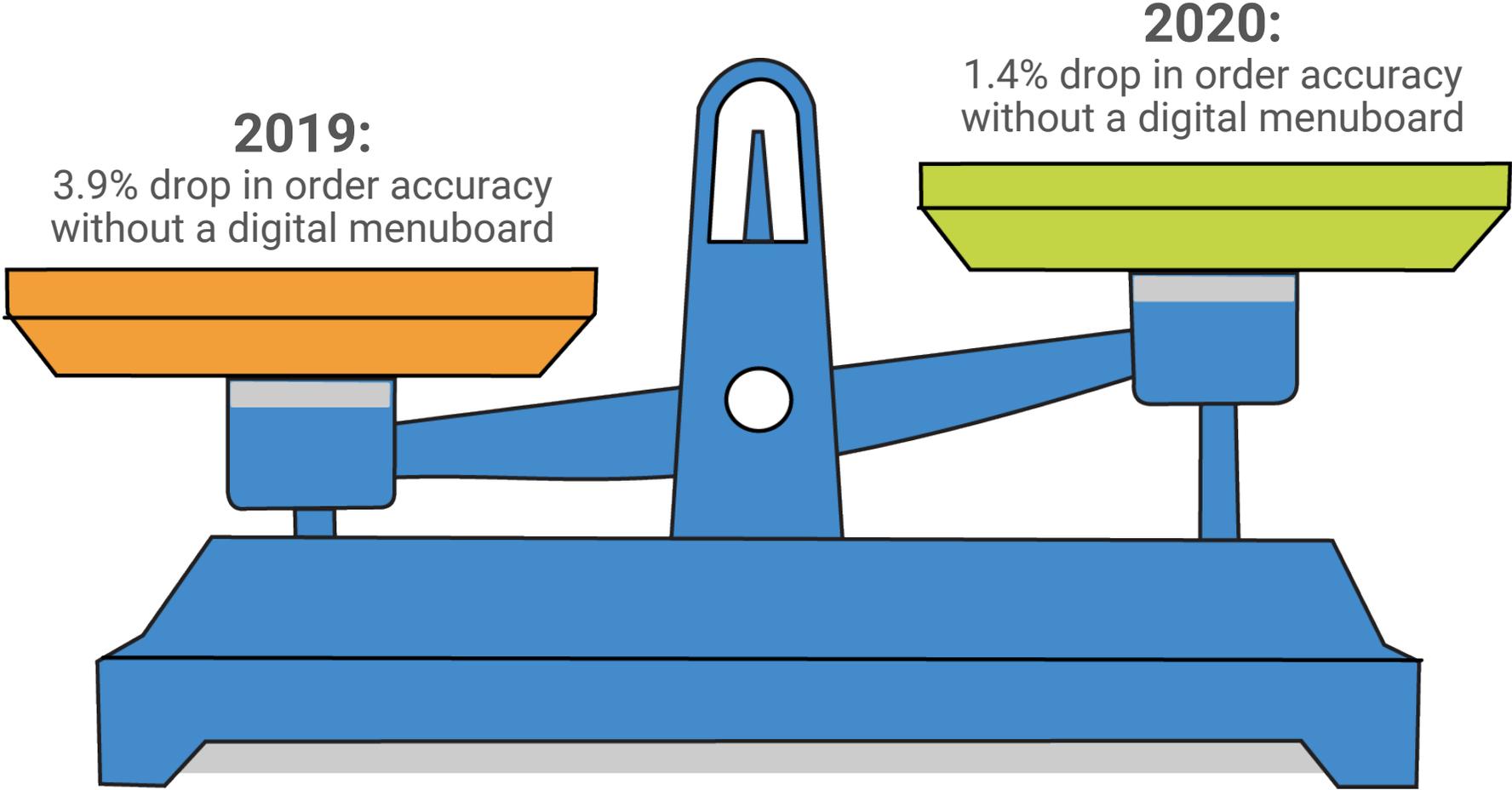
n=1,490; n yes=345

*Average meal cost estimated at \$6.83.
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
Brands should use their own timing and average purchase point to determine their own potential loss.

ACCURACY WITHOUT DIGITAL MENUBOARDS

While digital menuboards help with timing, their ability to drive accuracy improvements is more ambiguous.



n menuboard=345 when comparing digital menuboard accuracy to non-digital menuboard accuracy in each individual year

Q35a. Was the primary menuboard a digital menuboard?

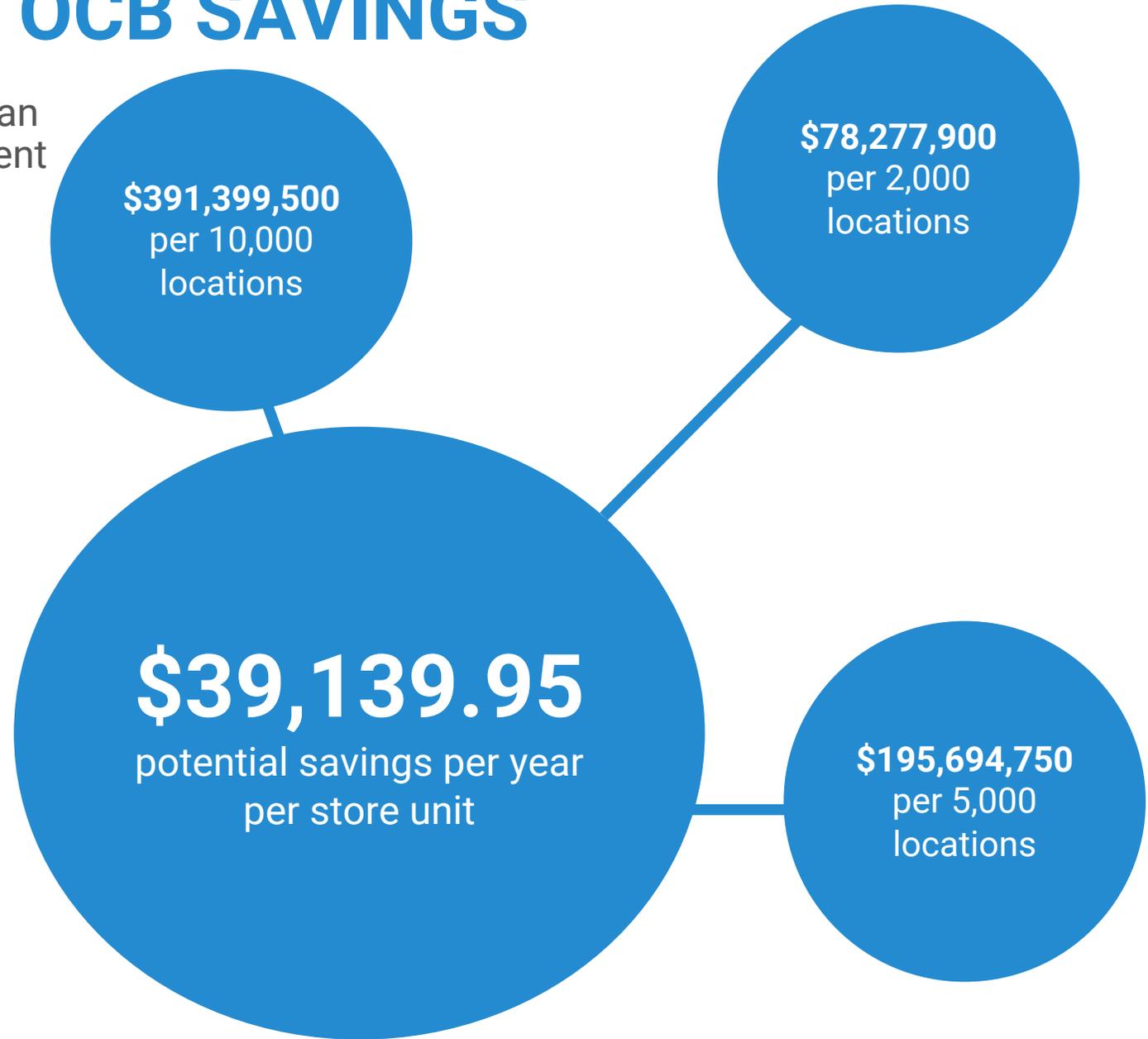
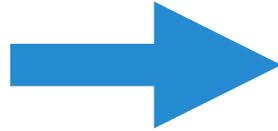
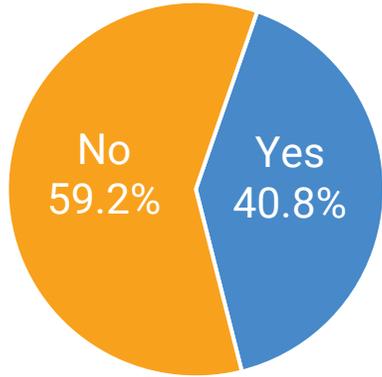
Q20. Was your drive-thru order filled correctly and completely accurate?

2020 SeeLevel HX Annual Drive-Thru Study

CALLING ATTENTION TO OCB SAVINGS

Order Confirmation Boards (OCBs) savings more than doubled in 2020. Is your brand making this investment to save \$39K per store unit per year?

Q33. Was an Order Confirmation Board (OCB) in place?



Service Time – with OCB
228.0 seconds



Service Time – without OCB
245.4 seconds

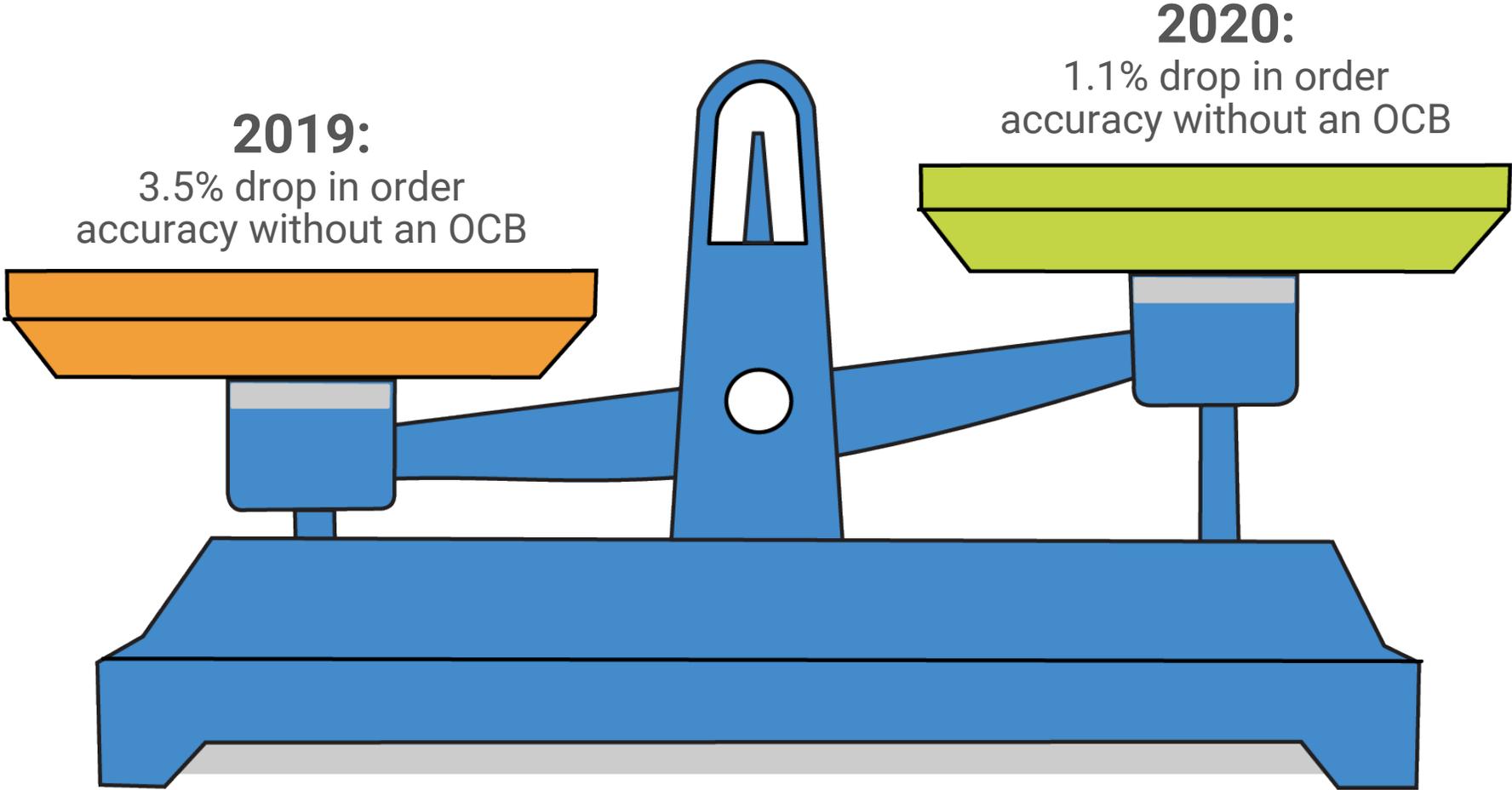
n=1,490; n yes=608

*Average meal cost estimated at \$6.83.
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
Brands should use their own timing and average purchase point to determine their own potential loss.

CLOSING THE GAP: OCBS & ORDER ACCURACY

What are brands doing to close the gap between OCB presence and order accuracy?



n OCB=608 when comparing OCB accuracy to non-OCB accuracy in each individual year

Q33. Was an Order Confirmation Board (OCB) in place?

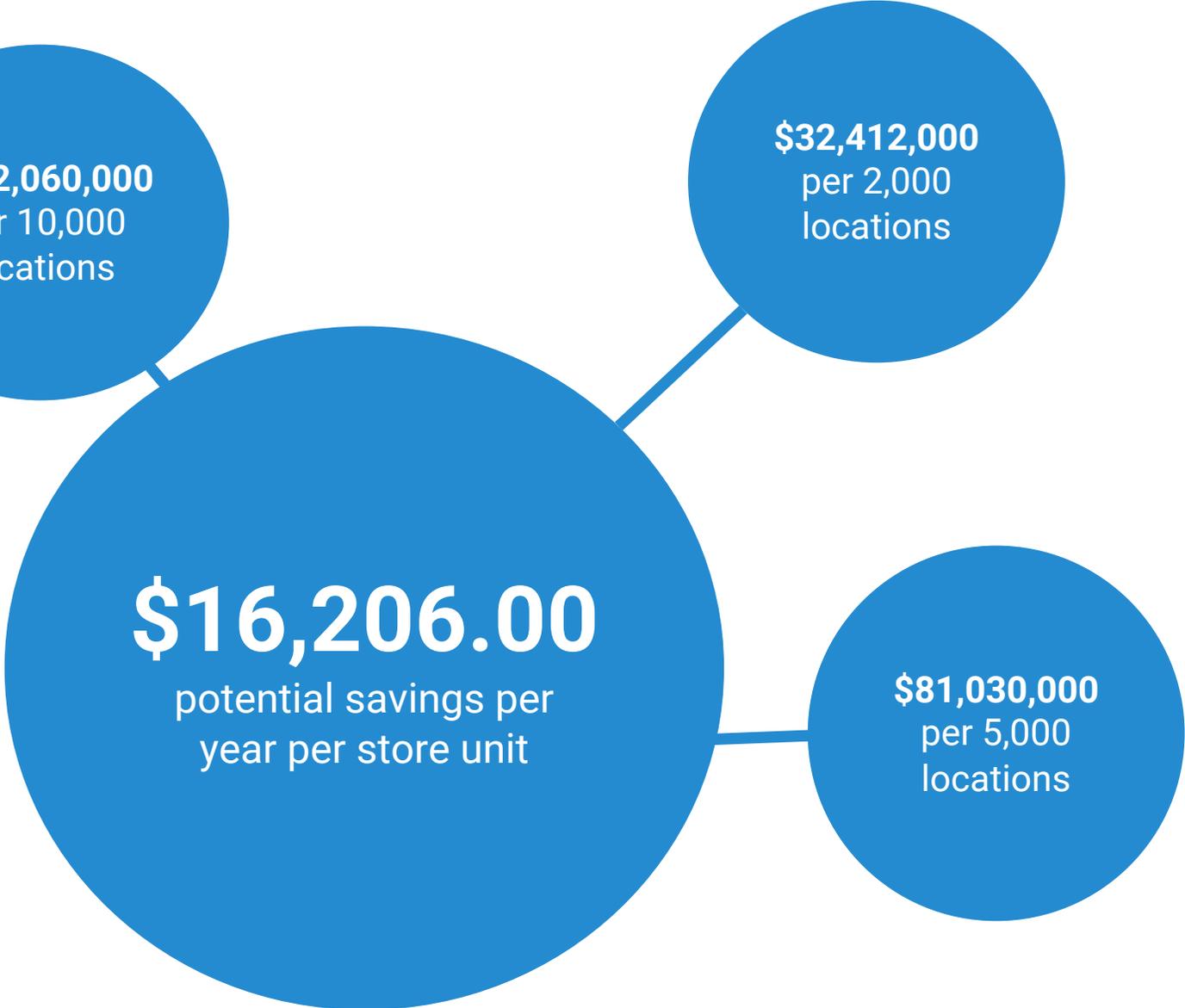
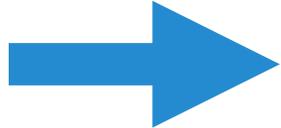
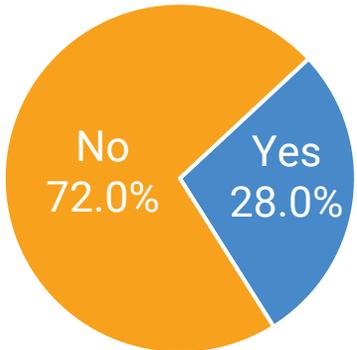
Q20. Was your drive-thru order filled correctly and completely accurate?

2020 SeeLevel HX Annual Drive-Thru Study

WHO'S FOCUSED ON SUGGESTIVE SELLING?

With only 28% of locations offering a suggestive sell, what else are these brands doing to reduce total times?

Q40. Was a suggestive sell offered?



Service Time – with Suggestive Sell
233.1 seconds



Service Time – without Suggestive Sell
240.3 seconds

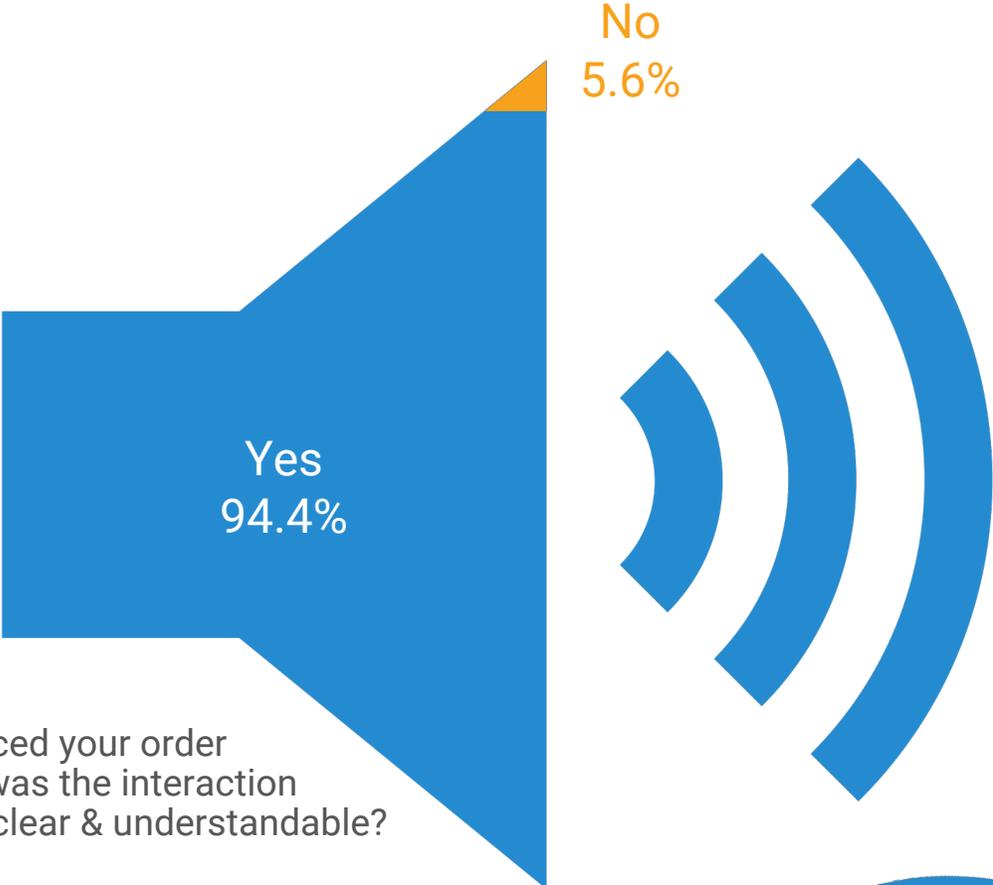
n=1,490; n yes=417

*Average meal cost estimated at \$6.83.
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
Brands should use their own timing and average purchase point to determine their own potential loss.

BACK TO THE BASICS WITH SPEAKER CLARITY

One chain's dip in speaker clarity performance **found in the full data set** brings to light the need to periodically check your technology to ensure quality.

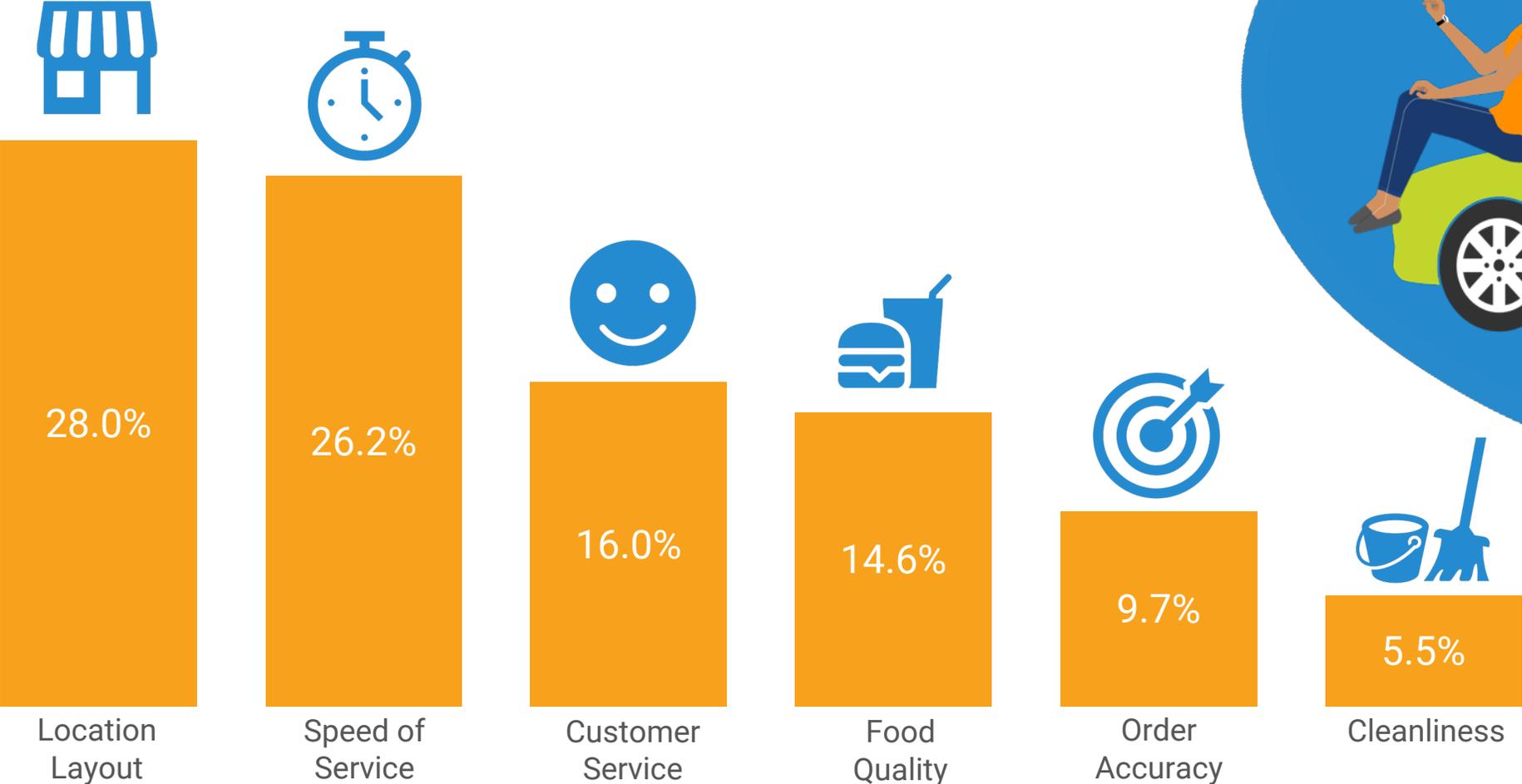


Q39b. If you placed your order at the speaker, was the interaction via the speaker clear & understandable?



NO SURPRISES IN IMPROVEMENT AREAS

Which area of improvement should your brand zone in on to win the customer dollar?



n=1,490
Q64. What is the one area that you feel this restaurant can improve?
*This is not customer data, but instead data from paid mystery shoppers.
2020 SeeLevel HX Annual Drive-Thru Study

UNVEILING SHIFTS IN CATEGORY LEADERS

McDonald's made great strides in accuracy, and Taco Bell's brand emphasis looks like it was on speed. Burger King seemed focused on customer service, while Dunkin' seemed to take a more comprehensive approach. [To see the full breakdown and performance of each chain in each category, purchase the full study here.](#)

Ranking	1	2	3	4	5	6	7	8	9	10
Accuracy										
Customer Service										
Taste										
Speed										

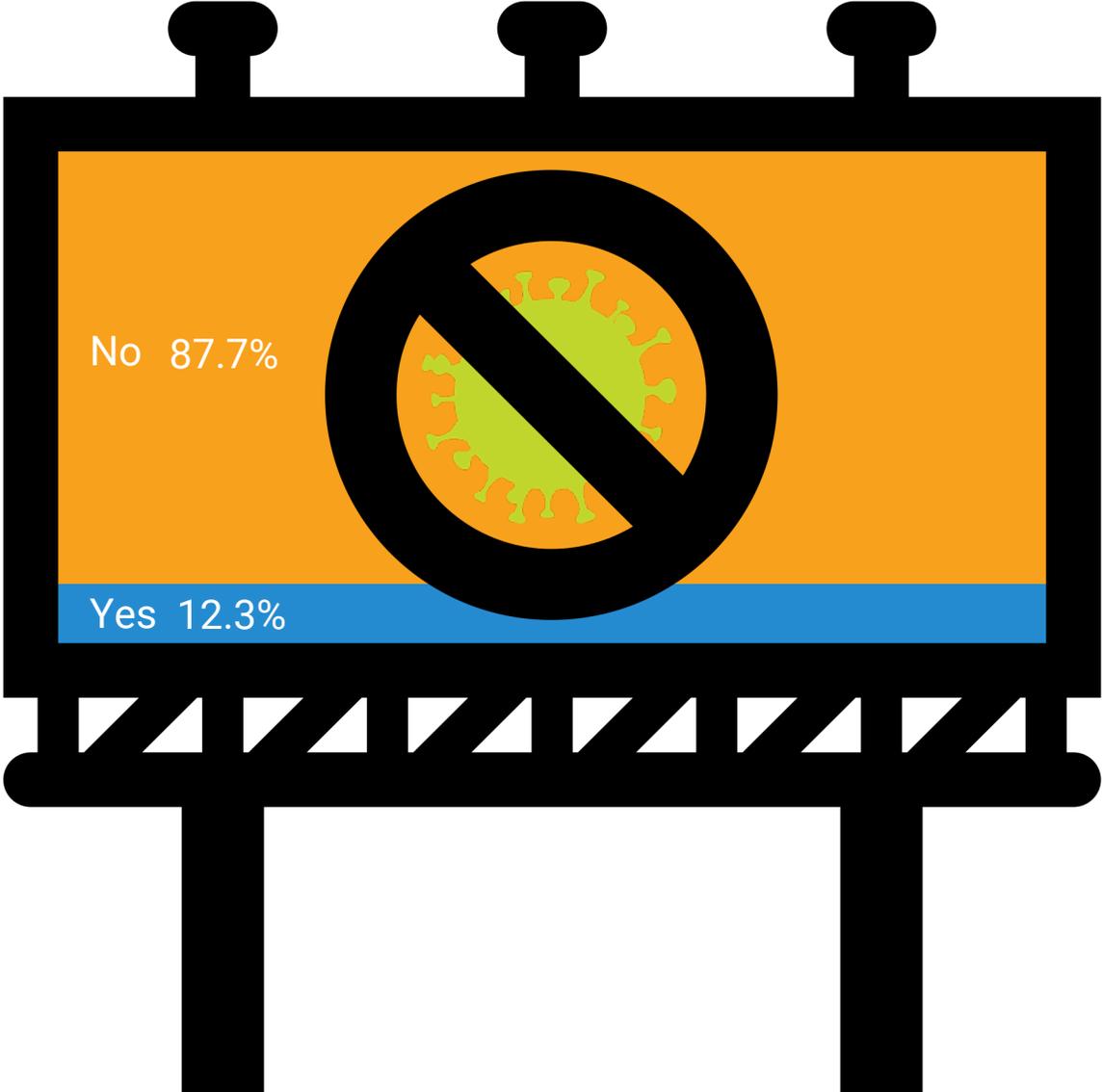
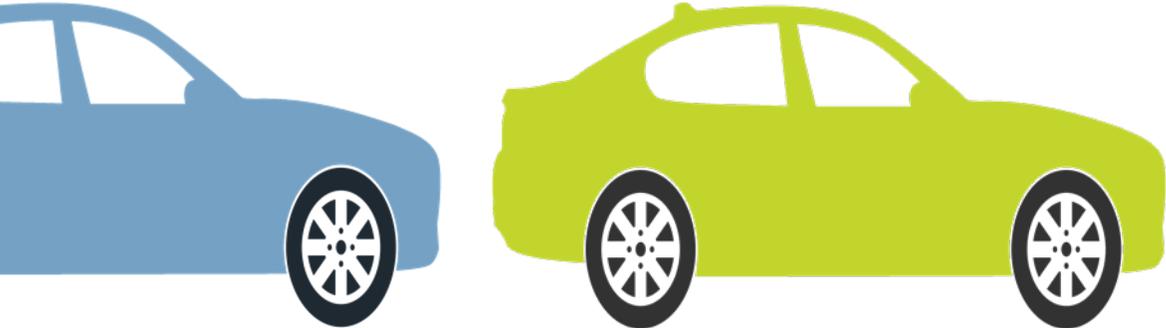
*Customer Service and Taste are not customer data, but instead data from paid mystery shoppers.
2020 SeeLevel HX Annual Drive-Thru Study

COVID-19 CONSIDERATIONS

SPOTTING SIGNS FOR SAFETY GOALS

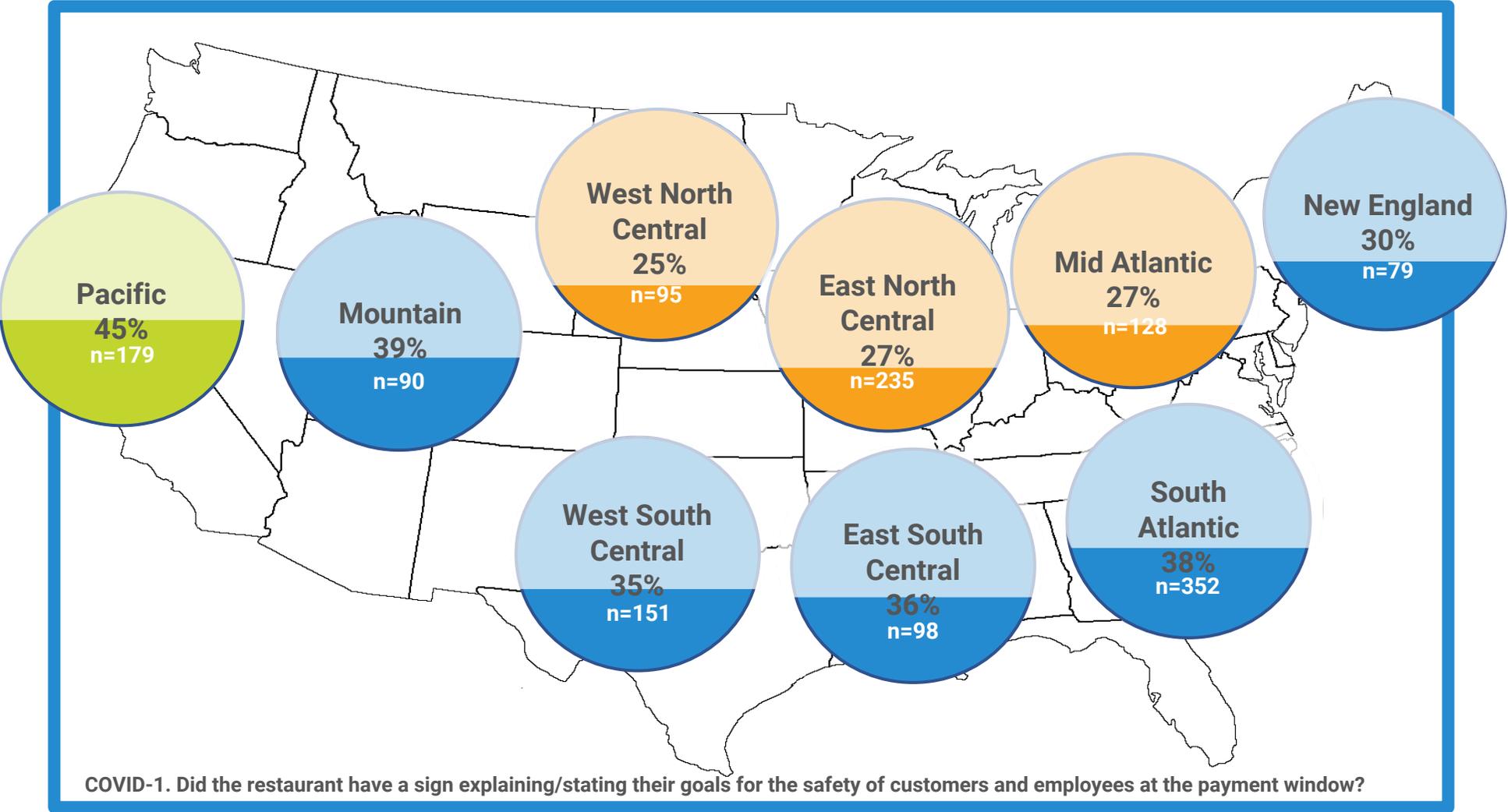
When is the right time to showcase your COVID-19 safety precautions to help customers decide if they want to dine in your establishments?

COVID-10. Did the restaurant have a sign explaining/stating their goals for the safety of customers and employees at the order station?



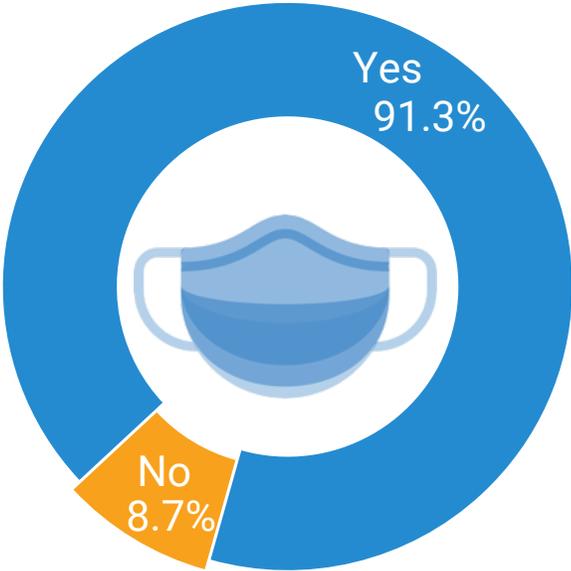
SPOTTING SIGNS FOR SAFETY GOALS (CONT.)

Locations in the Pacific (AK, CA, HI, OR, WA) were most likely to showcase signage regarding safety precautions, while locations in the West North Central division (IA, KS, MN, MO, NE, SD) were the least likely.

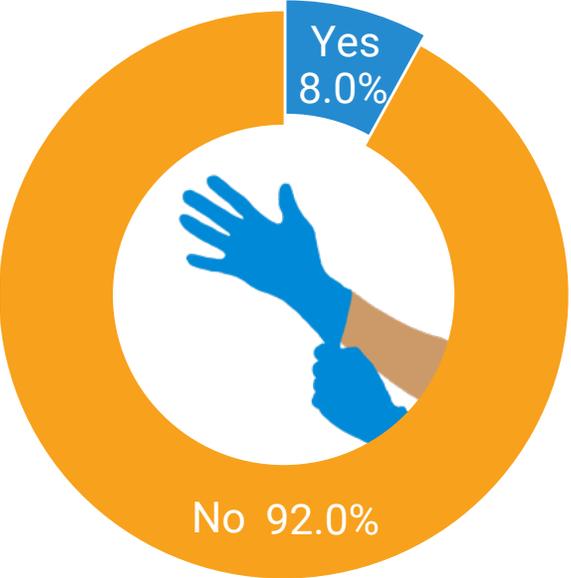


CONSIDERING THE USE OF GLOVES AND MASKS

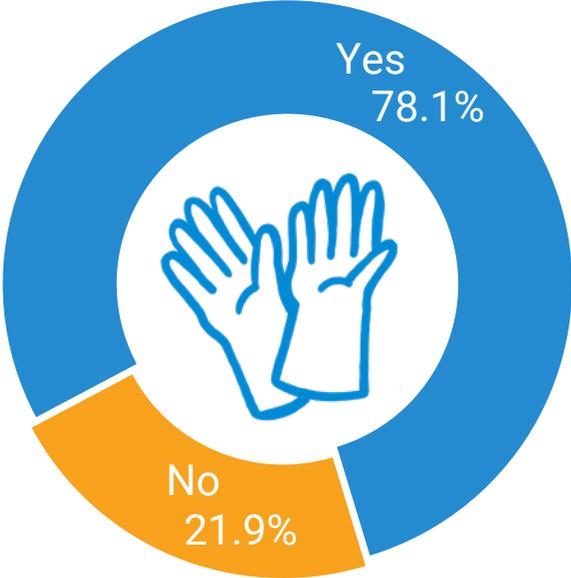
Masks are more prevalent than glove wearing amid COVID-19, and if employees wore gloves, it was rare that a customer saw employees change them out. This data begs the age-old question, if customers aren't witnessing your safety precautions and procedures, are they really happening?



COVID-5. Was the employee at the payment/Pickup window wearing a mask?
n=1,490



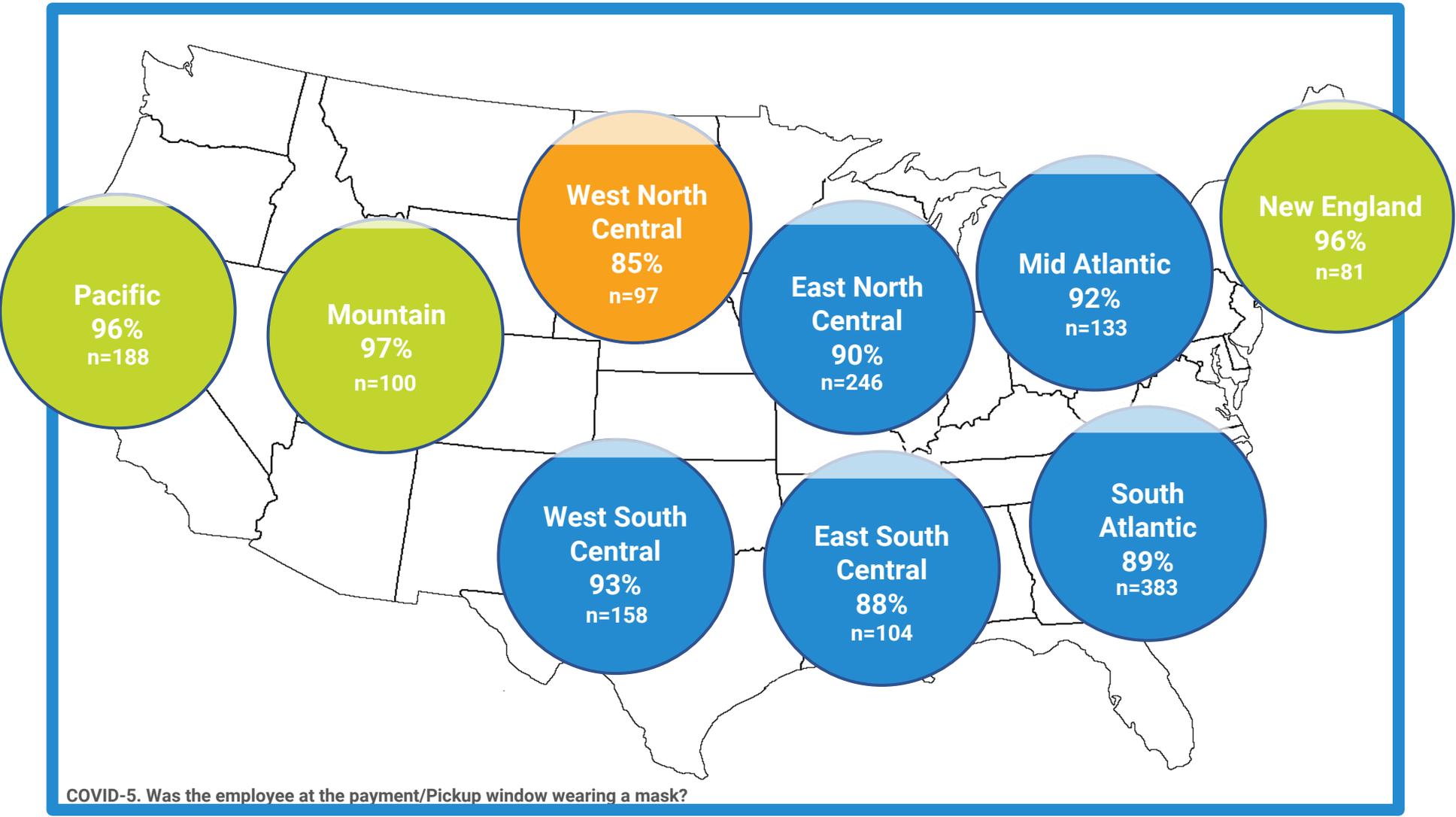
COVID-3b. If the cashier wore gloves to handle the payment, did you see them change gloves?
n=855



COVID-6. Was the employee at the payment/Pickup window wearing gloves?
n=1,490

CONSIDERING THE USE OF MASKS (CONT.)

Surprisingly, 15% of locations in the West North Central division (IA, KS, MN, MO, NE, SD) did not have masks, whereas states in the Mountain division (AZ, CO, ID, MT, NM, UT, WY) were most likely to have them.



COVID-5. Was the employee at the payment/Pickup window wearing a mask?

OVERCOMING UNFORESEEN OBSTACLES

Nine percent of locations promoted a limited menu, whereas some limited the menu without notification. What efficiencies does your brand have in place to handle COVID-19-related events and/or supply chain issues?



CALLING FOR ADDITIONAL PLASTIC BARRIERS

Only 58.7% of brands measured in the study provided clear plastic barriers at all drive-thru windows. Could this safety measure help customers feel safer and more comfortable dining with your brand?

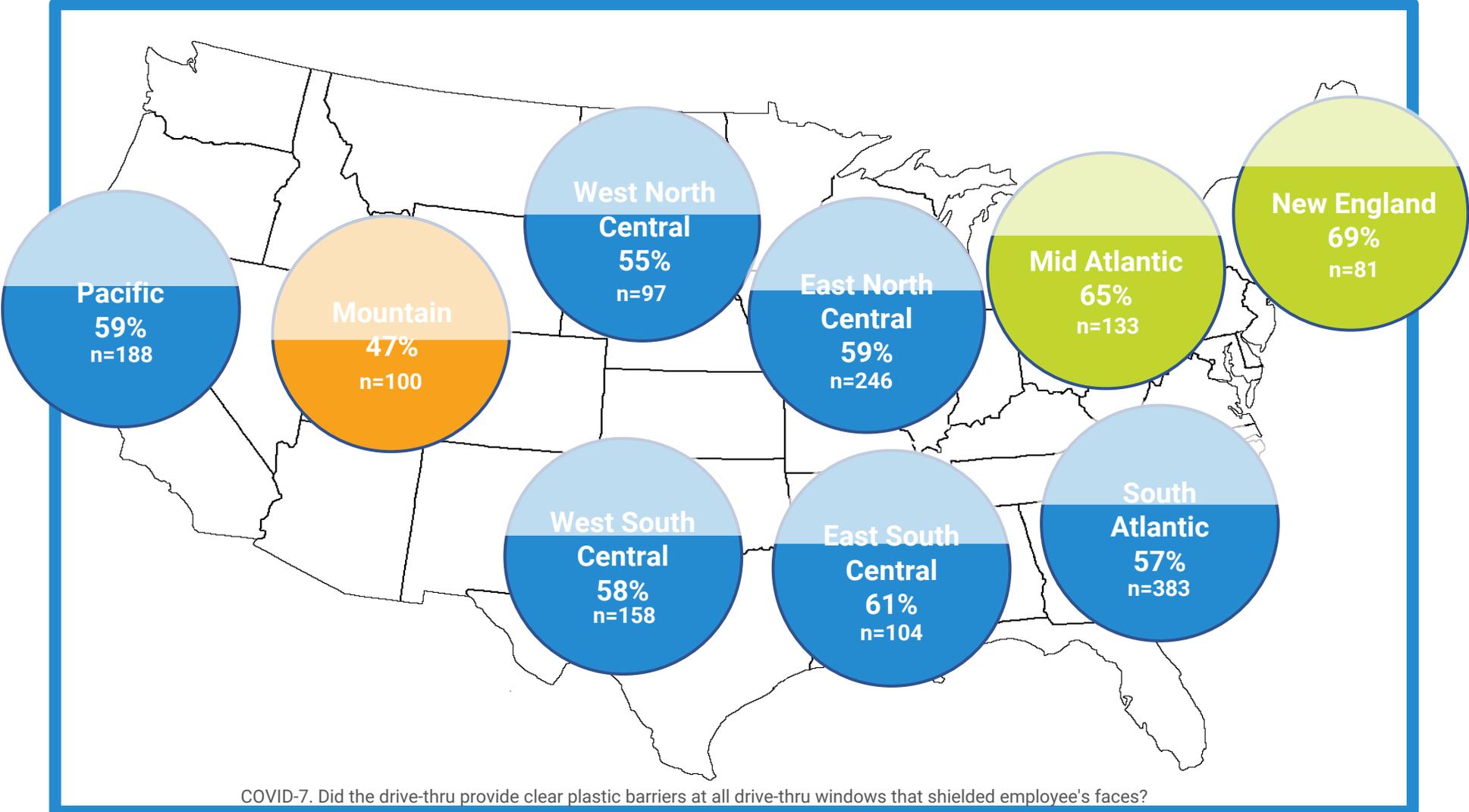


COVID-7. Did the drive-thru provide clear plastic barriers at all drive-thru windows that shielded employee's faces?



CALLING FOR ADDITIONAL PLASTIC BARRIERS (CONT.)

While the Mountain division (AZ, CO, ID, MT, NM, UT, WY) was most likely to have employees wearing gloves/masks, they were the least likely to use plastic barriers.

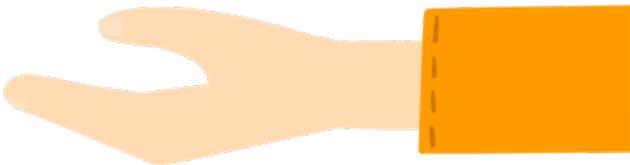
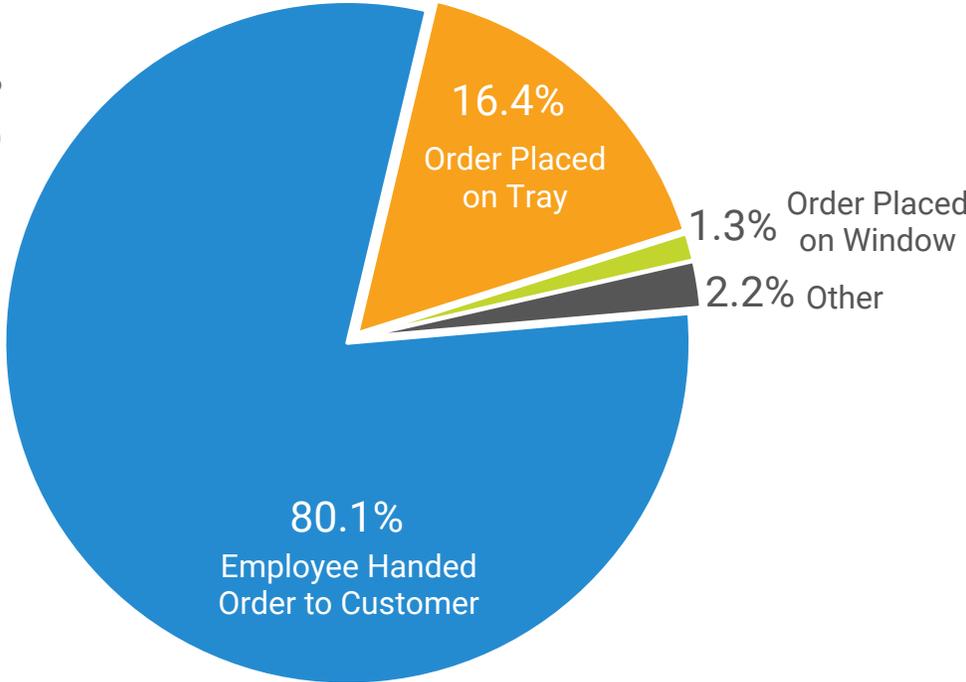


COVID-7. Did the drive-thru provide clear plastic barriers at all drive-thru windows that shielded employee's faces?

CONTACTLESS PROVES EASIER SAID THAN DONE

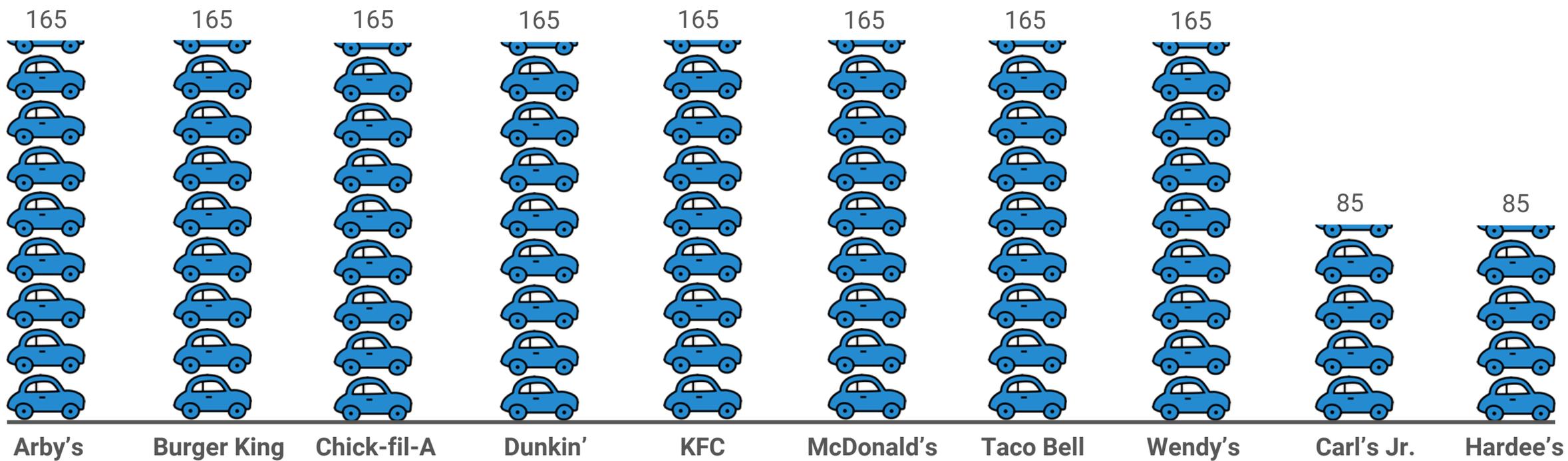
With 80.1% of orders handed to the customer directly by an employee, contactless order deliveries prove difficult to achieve in drive thrus.

COVID-8. How was your order given to you?
(What type of contactless delivery was used?)



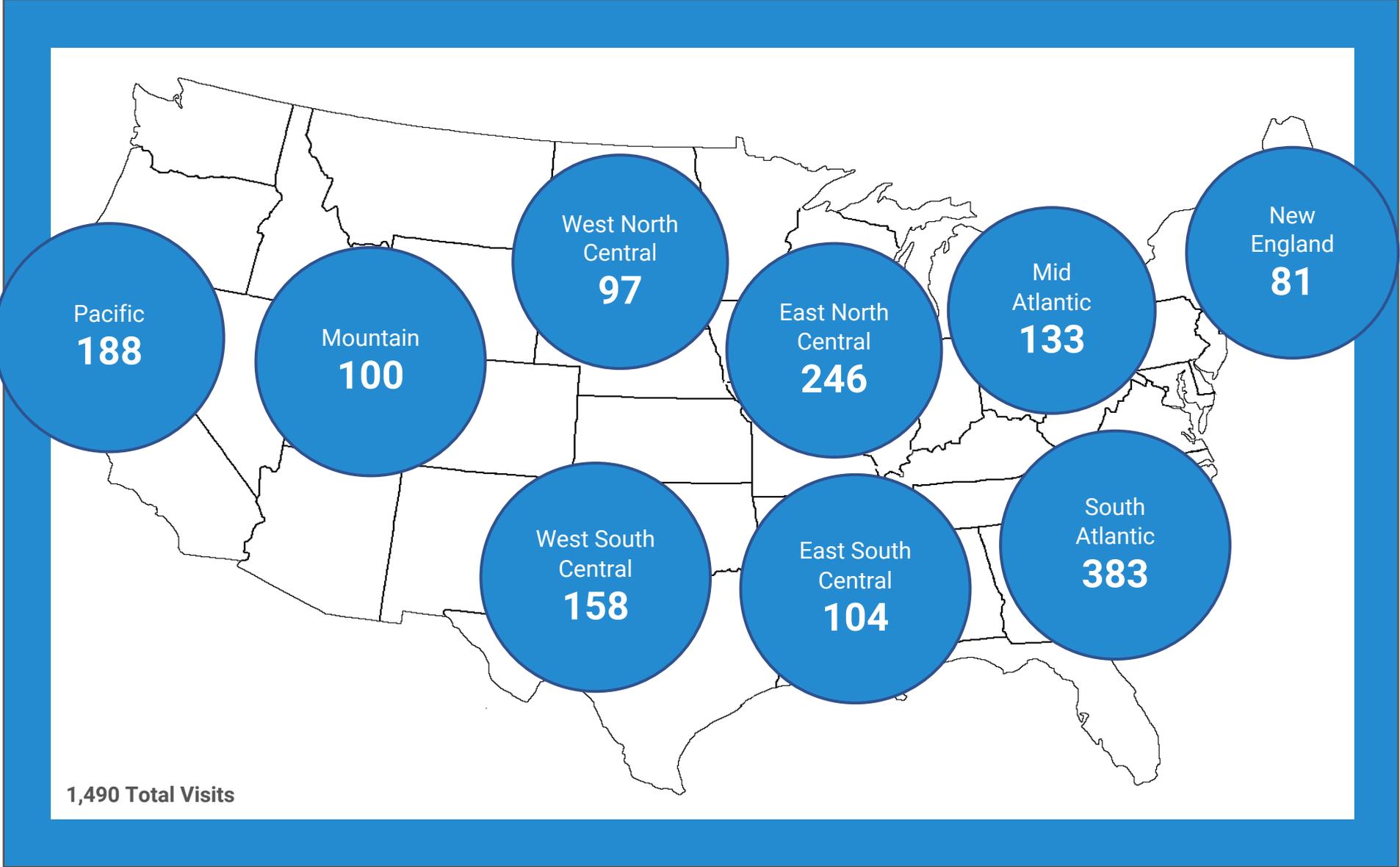
ADDENDUM

EVALUATIONS BY BRAND



 = 20 shops

GEOGRAPHICAL DISTRIBUTION



1,490 Total Visits

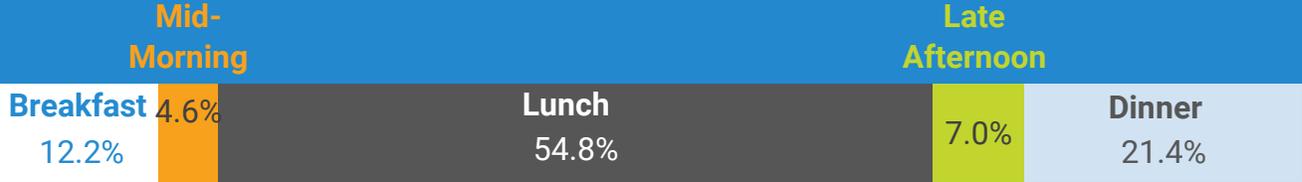
STUDY OVERVIEW

Fieldwork
Period



June 2020 – August 2020

Shop
Distribution



Attributes
Measured



Speed of Service



Order Accuracy



Suggestive Sell



Customer
Service



Menuboard
Appearance



Order Confirmation
Boards (OCBs)



COVID-19

READY TO UNMASK EVEN MORE DATA IN

DRIVE-THRU PERFORMANCE?

Purchase the full 2020 SeeLevel HX Annual Drive-Thru Study data for \$4,995 and gain access to:

- Detailed Study Findings by Brand
- Raw Data File in Excel
- Customizable Reporting Portal
- Readout of the Data
- Your Brand Questions Answered by SeeLevel HX Experts

[PURCHASE THE FULL STUDY »](#)