

23rd Annual

Drive-Thru Study



In partnership with: **QSR**



About Intouch

Intouch Insight specializes in helping multi-location businesses achieve operational excellence so they can exceed **customer expectations**, **strengthen brand reputation**, and **improve financial performance**.

Intouch enables brands to collect and centralize data from multiple customer touchpoints, giving them actionable, real-time insights in an advanced analytics platform. With roots dating back over 40 years, Intouch is trusted by over 300 of North America's most-loved brands for their customer experience management, customer surveys, mystery shopping, competitive intelligence and pricing studies, mobile forms, operational and compliance audits, geolocation data capture, and event marketing automation solutions.

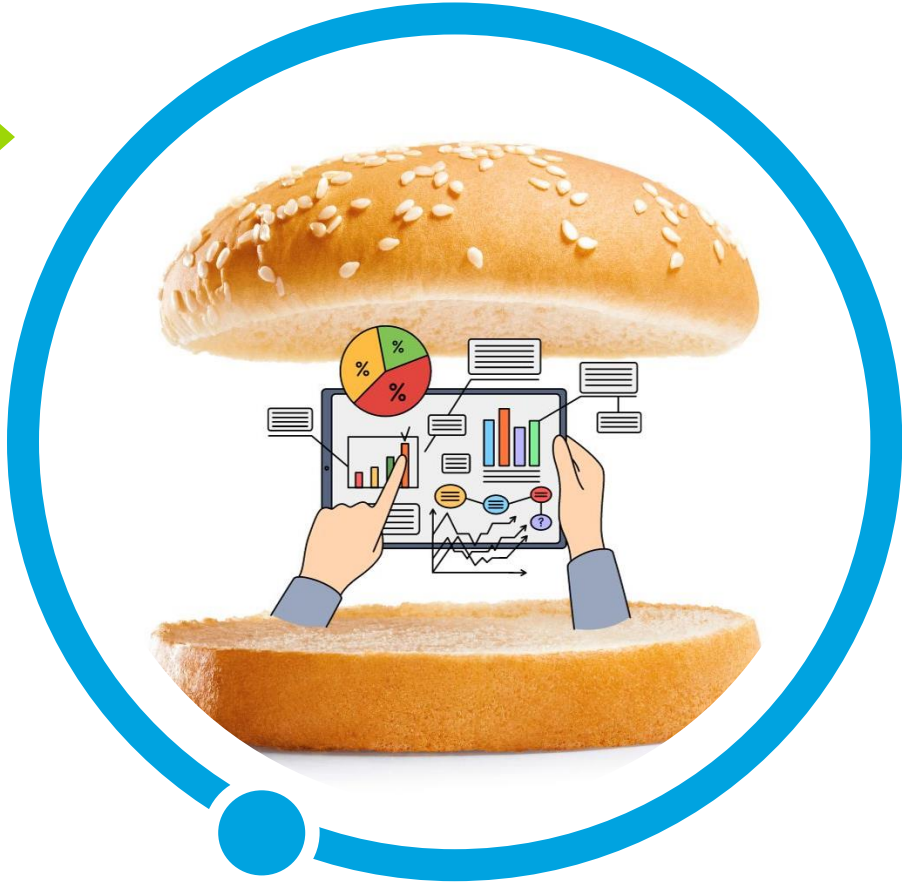
For more information, visit www.intouchinsight.com.



2023 Annual Drive-Thru Study Table of Contents

Methodology	Page 6
Speed of Service	Page 10
Accuracy	Page 23
Suggestive Selling	Page 31
Food Quality	Page 42
Satisfaction	Page 49
Glossary	Page 57





Want More?

Did you know you can receive access to the full data set from this study for just \$4,999 USD?

What you get?

- Complete study findings accessed through the Intouch Insight platform
 - Interactive & powerful dashboards
 - Granular filters
 - Pre-built visualizations
- Raw data files
- Orientation session on the platform and the data

>> *Contact us to find out what's included: letschat@intouchinsight.com*

Benchmark your Brand

Find out how your brand measures up. Brands outside of the core 10 can participate as a **Challenger Brand**.

For just \$9,995 you get:

- **Your brand data:** 150 Mystery Shops conducted on your locations. Price includes all shopper fees and food reimbursements.
- **Complete Research Package:** Access your results alongside the 10 benchmark brands. Raw data files included.
- **Custom Reporting:** Your portal comes pre-loaded with custom dashboards for your brand, and a personal advisory call to review the results.

>> **Secure your spot for next year's study!** letschat@intouchinsight.com





Methodology

For 23 years, the Annual Drive-Thru study has covered the same core brands, delivering a long history of providing the leading insights into drive-thru performance.



DUNKIN'



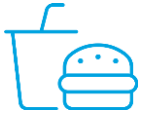
The Study

The Annual Drive-Thru study is, at its heart, a time-based study that uses **mystery shopping** to capture industry performance benchmarks from 10 of the leading QSR brands.

Unlike traditional consumer surveys, this study relies on real-time, unannounced visits by mystery shoppers, thus capturing data on **speed of service, accuracy, suggestive selling, food quality, and the level of satisfaction** with the experience.



Where & When



Shops Performed by Brand

1. Arby's	165	6. Hardee's	85
2. Burger King	165	7. KFC	165
3. Carl's Jr.	85	8. McDonald's	165
4. Chick-fil-A	166	9. Taco Bell	165
5. Dunkin'	165	10. Wendy's	165

Breakfast
(5:00am - 10:29am)

8%

Lunch
(10:30am - 1:30pm)

40%

Late afternoon
(1:31pm - 4:00pm)

12%

Dinner
(4:01pm - 7:00pm)

40%



June 2023 -
July 2023



Geographically
Distributed



1491 Drive-Thru
Shops Completed

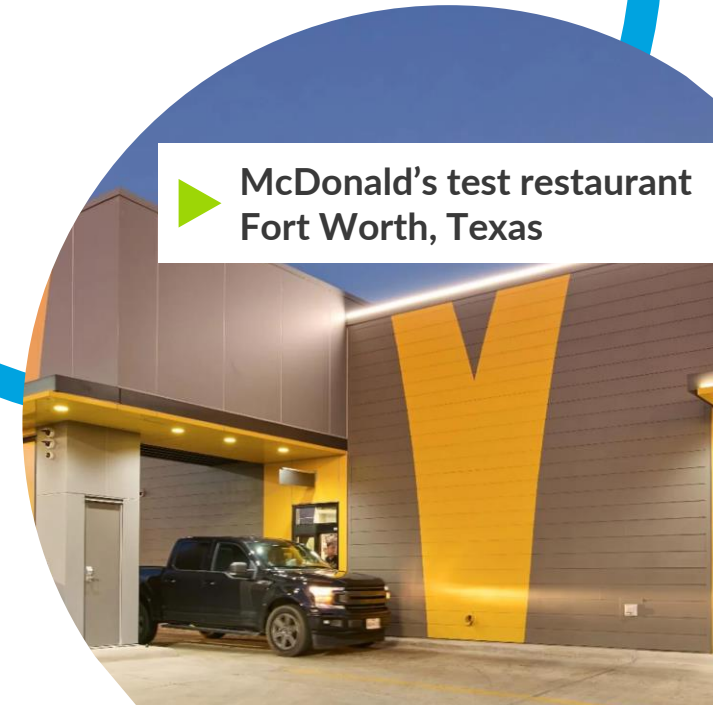
New for 2023

While the core study methodology has been consistent over time to provide trend data, we enhance that with insights that reflect the current state of the industry.

For this year, we have introduced our **Innovation Locations**, where we examine the impacts of technology at select prototype locations that have recently been launched.



▶ Taco Bell Defy
Brooklyn Park, Minnesota



▶ McDonald's test restaurant
Fort Worth, Texas

Speed

When executed properly, drive-thrus meet the needs of the time-conscious consumer. But only if the drive-thru is operating fast and efficiently.

The average total time for 2023 decreased by 29 seconds over last year with the biggest change being to wait times. Wait times decreased by 25 seconds. This is likely due to a reduction in cars waiting in line.

The average number of vehicles in line has dropped from 2.76 cars in 2022 to 1.27 cars in 2023.

With service time only decreasing by an average of 4 seconds, it provides an opportunity for brands that can improve the efficiency of their drive-thru operations to stand out from the competition.

Improving service time

Brands looking to boost their service time should ensure they optimize the tools used to communicate with customers in line. We saw a strong correlation between clear communication and service speed **with improvements of ~60 seconds**. This is especially important to consider as brands incorporate new order-taking technology.

Orders were:



When the speaker was clear and understandable, compared to when it was not.



When the speaker volume was loud enough to hear, compared to when it was not.



When the shopper did not have to repeat their order, compared to when they did.



Category Leaders: Fastest Total Time

Total time is the total amount of time the shopper spent in the drive-thru. Time starts when the shopper enters the drive-thru and ends once they exit with their food.

2023
Category Leader



RANK

2023

2022

2021

1



Taco Bell



KFC



Chick-fil-A

2



KFC



Taco Bell



McDonald's

3



Carl's Jr.



Hardee's



Wendy's

4



Arby's

DUNKIN' Dunkin'

DUNKIN' Dunkin'

5

DUNKIN' Dunkin'



















Carl's Jr.



Taco Bell

Category Leaders: Fastest Service Time

Service time is the amount of time it took the shopper to place their order until they exit the drive-thru with their food.

2023 Category Leader	RANK	2023	2022	2021
	1	 Taco Bell	 Taco Bell	 Taco Bell
	2	 Wendy's	 Dunkin'	 Wendy's
	3	 KFC	 KFC	 McDonald's
	4	 Dunkin'	 Arby's	 Dunkin'
	5	 Carl's Jr.	 Burger King	 Arby's

Category Leaders: Fastest Total Time by Car

Calculated by dividing the average total time by the average cars in line. Shoppers are instructed to count the number of vehicles in their lane, in front of their vehicle, up to the speaker.



n=1491

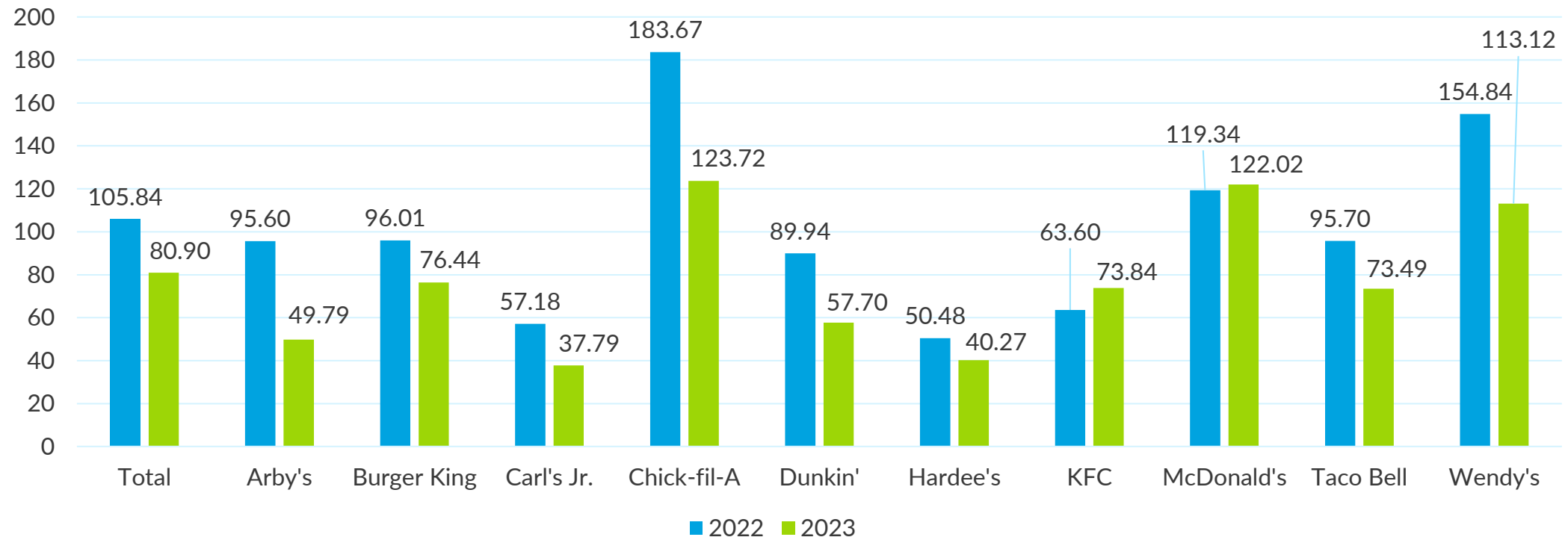
RANK	2023	2022	2021
1	Chick-fil-A	Chick-fil-A	Chick-fil-A
2	McDonald's	McDonald's	McDonald's
3	Wendy's	Taco Bell	Wendy's
4	Taco Bell	Arby's	Dunkin'
5	Burger King	Dunkin'	Taco Bell



Carl's Jr. had the quickest average wait time.

Wait Time

Average Wait Time (in seconds) by Brand

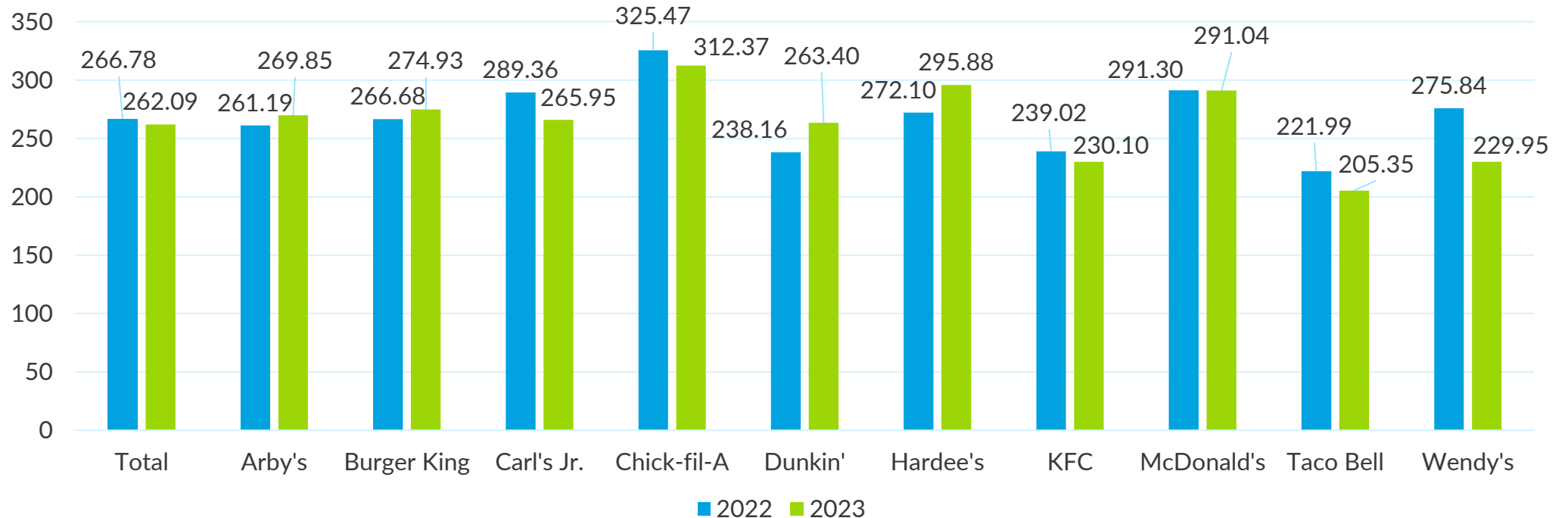


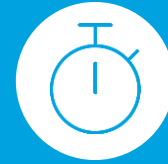


Taco Bell had the quickest average service time.

Service Time

Average Service Time (in seconds) by Brand

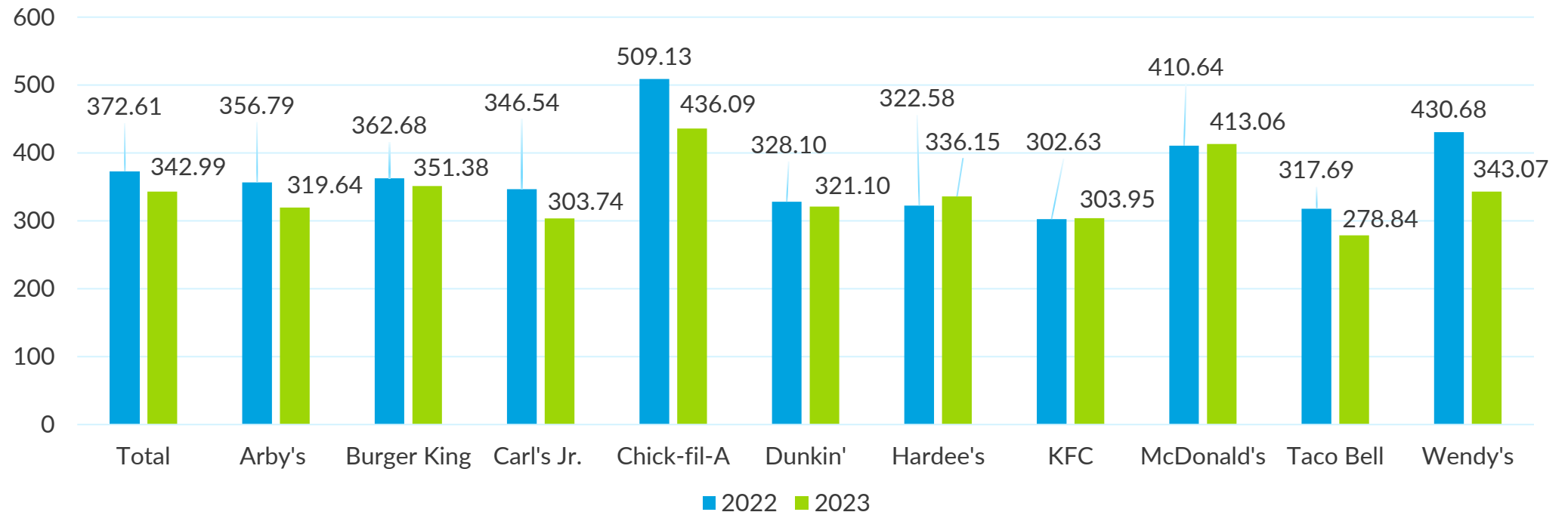




Taco Bell had the quickest average total time.

Total Time

Average Total Time (in seconds) by Brand

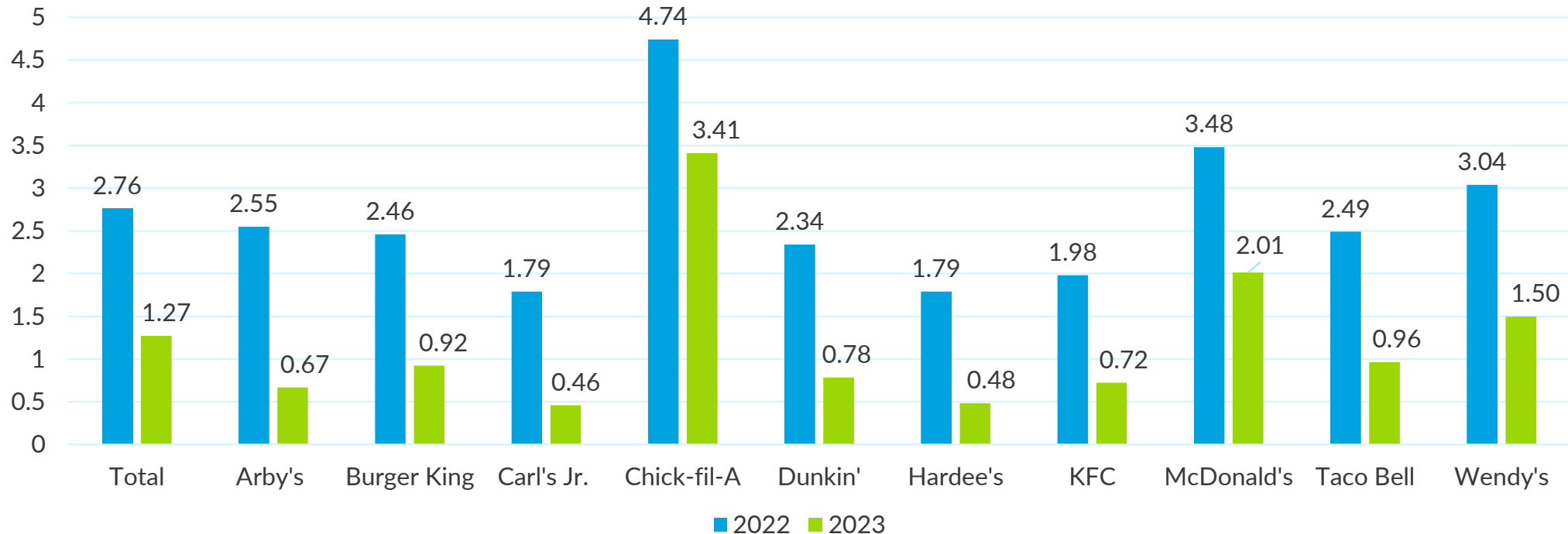


Cars in Line to the Speaker



Chick-fil-A had the
most cars in line.

Average # Cars in Line by Brand

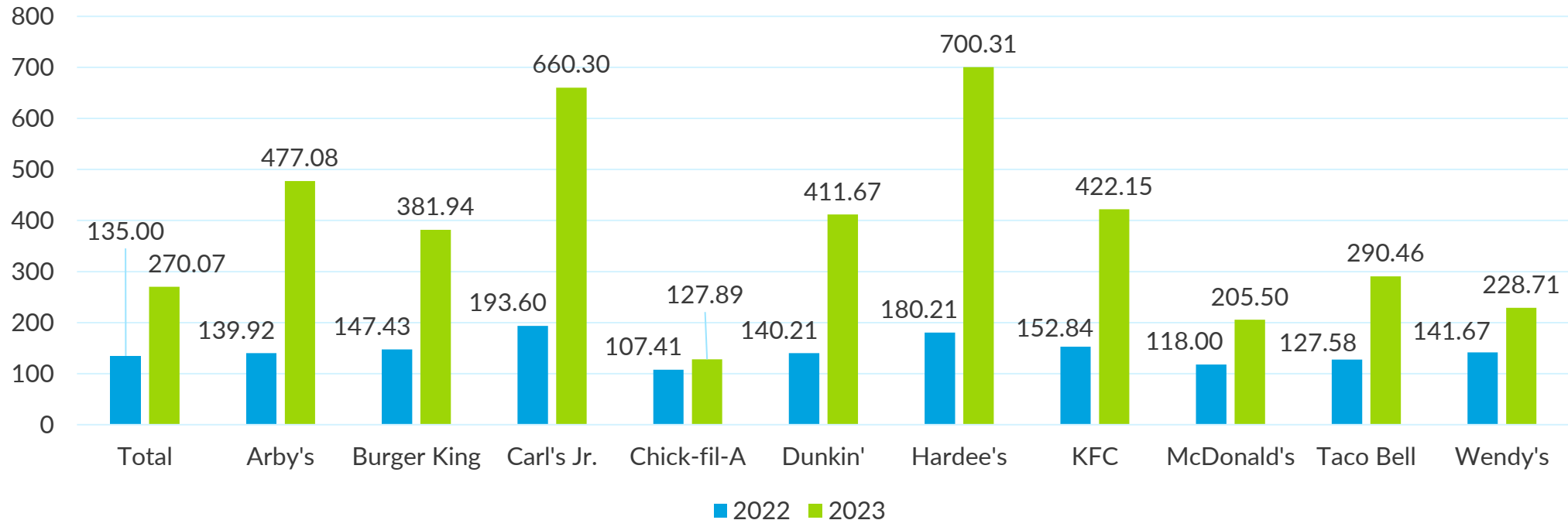


Total Time by Cars in Line

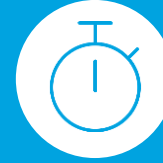


A major factor impacting time spent in the drive-thru is the volume of vehicles in line. Here, we have divided the total time by the number of cars in line. This provides an alternate view that, in effect, levels the playing field for the brands.

Average Total Time (in seconds) by Cars in Line

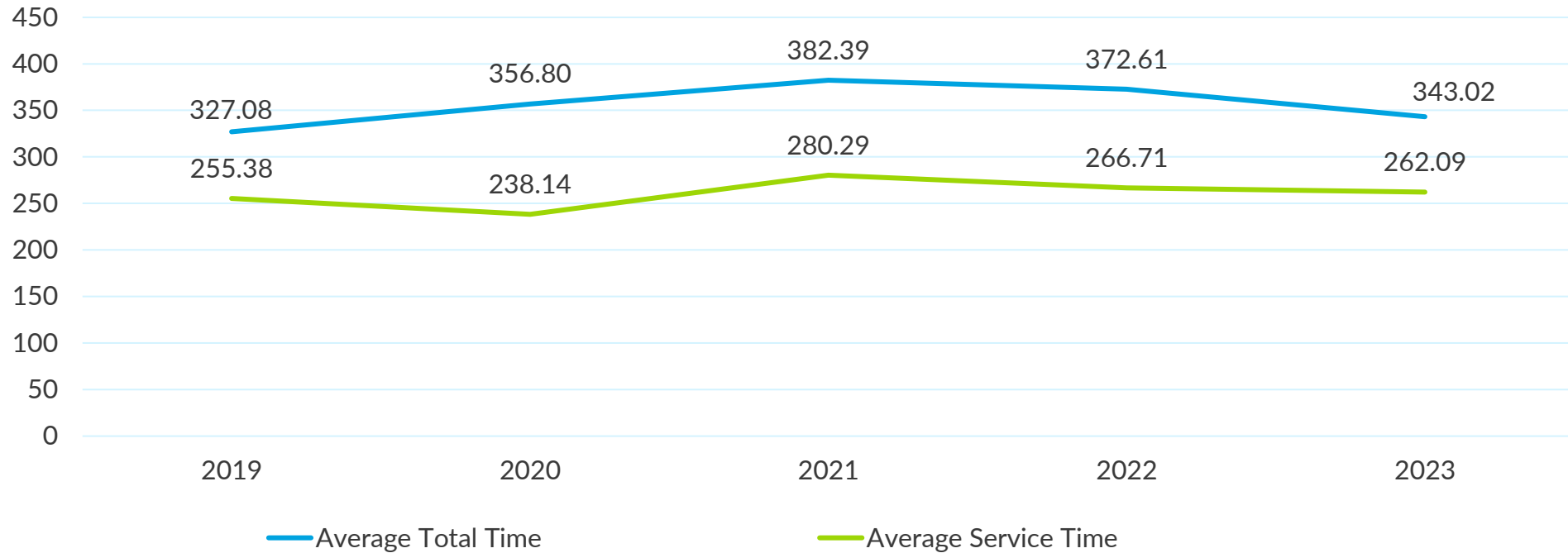


Speed of Service



Timeliness has seen a great improvement in 2023 compared to 2022. Wait time has improved by 25 seconds, service time has improved by 4 seconds, and total time has improved by 29 seconds.

Speed of Service (in seconds) Over the Years

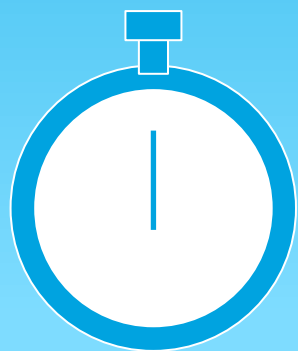




Innovation Locations

In this year's study, we examined the performance at two prototype locations, Taco Bell Defy in Brooklyn Park, Minnesota and McDonald's test restaurant located just outside Fort Worth Texas to see how they compared to this year's data.

Avg Service Time
2023 Study - Overall



4m : 22s

▶ Comparison 1: Service Time



Brand Overall

4m : 51s

Innovation Locations

3m : 49s



3m : 25s

2m : 31s

Note: The data from the Innovation Locations is not included in the overall study results.

What 5 Seconds Can Do to the Bottom Line

Based on an average meal cost of \$10.35, if brands were to improve their **total time** by even 5 seconds, this improvement could have great financial benefits.

\$8,210.54	Potential gain per year per store unit
\$16,421,080	Per 2000 locations
\$41,052,700	Per 5000 locations
\$82,105,400	Per 10,000 locations

*Average meal cost is the average cost from this 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 gain/loss.

Want More?

Purchase the complete reporting package to see how speed is impacted by:

- *# Cars in line*
- *# Stations in use*
- *# Lanes*
- *Form of payment*
- *Weather*
- *Daypart*
- *Friendliness*
- *Labor shortages*
- *Region*
- *and more*

>> Contact
letschat@intouchinsight.com



Accuracy

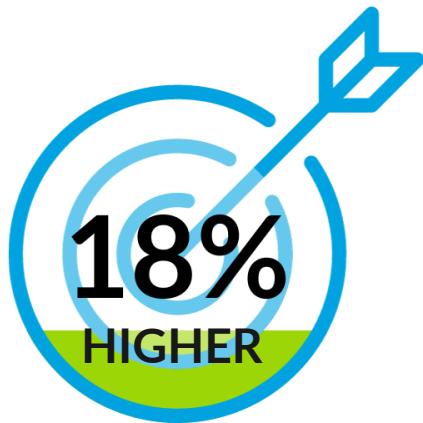
A crucial aspect of the drive-thru experience is that consumers receive the correct orders. While we saw a slight increase by 1% in order accuracy over 2022, the average accuracy score in 2023 was 86%. This means that even the best performer got the order wrong almost **1 out of every 10 times** and the poorer performers got it wrong almost **2 out of every 10 orders**.

As the drive-thru experience continues to evolve and new technology is adopted, including Voice-AI technology or robotics in the kitchen, brands will need to ensure the tools implemented are working as they expected to enhance the experience, not add additional friction points.

Improving order accuracy

As with speed, we saw that clear communication between staff and customers had a positive impact on order accuracy. Investing in optimizing the tools used in the drive-thru is a simple and effective way to improve accuracy scores.

Order accuracy was:



when the speaker was clear and understandable, compared to when it was not.



when the speaker volume was loud enough to hear, compared to when it was not.



when the shopper did not have to repeat their order, compared to when they did.



Category Leaders: Order Accuracy

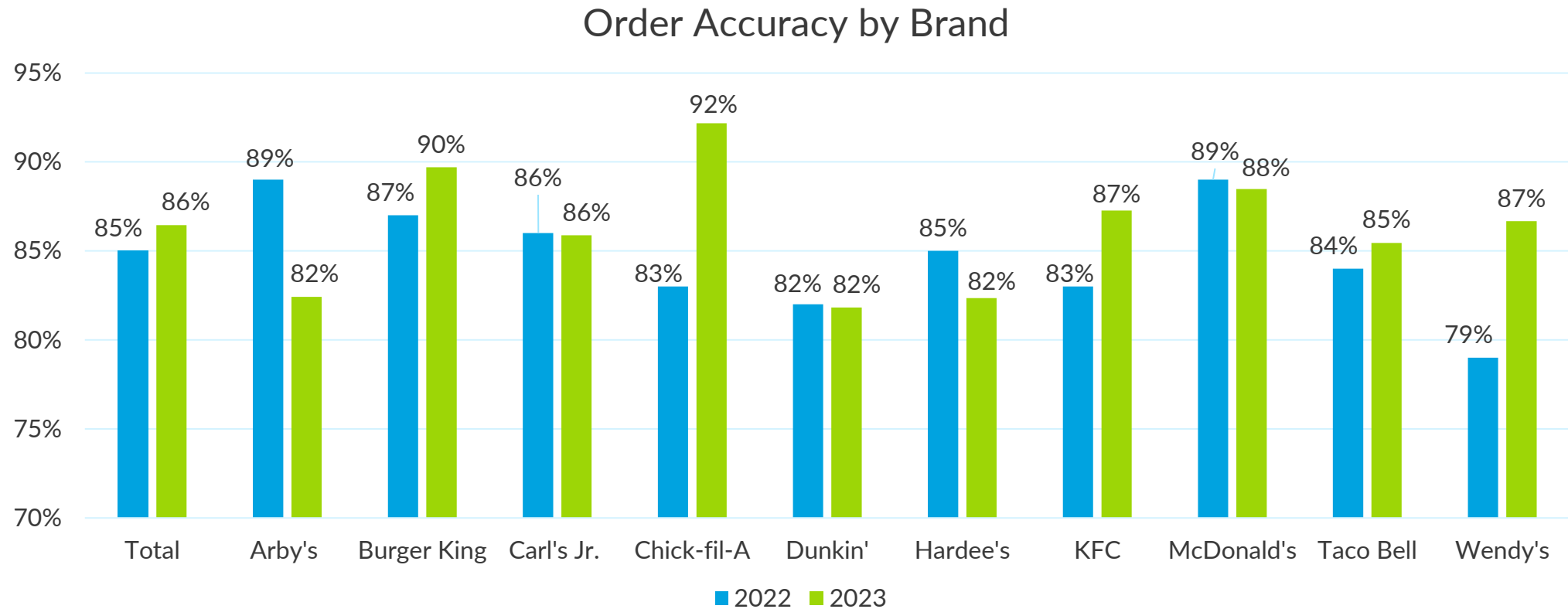
Order accuracy measures how accurate the order was including: main entrée, side item, beverage, and any special requests.

2023 Category Leader	RANK	2023	2022	2021
	1	 Chick-fil-A	<u>Tied</u>  Arby's	 Chick-fil-A
	2	 Burger King	 McDonald's	 Taco Bell
	3	 McDonald's	 Burger King	<u>Tied</u>  Arby's
	4	<u>Tied</u>  KFC	 Carl's Jr.	 Burger King
	5	 Wendy's	 Hardee's	 Carl's Jr.



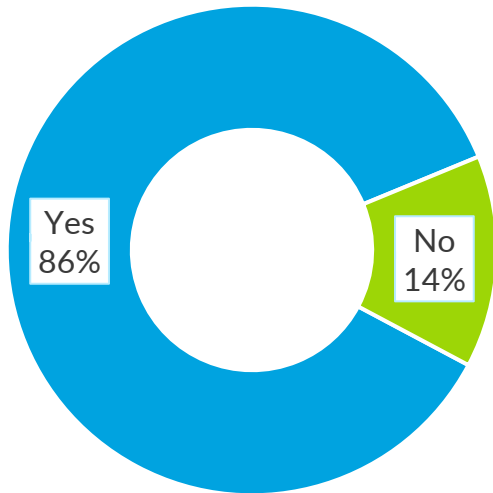
Chick-fil-A had the highest order accuracy.

Accuracy by Brand



Inaccurate Orders

Was your drive-thru order filled correctly and completely (including special requests)?

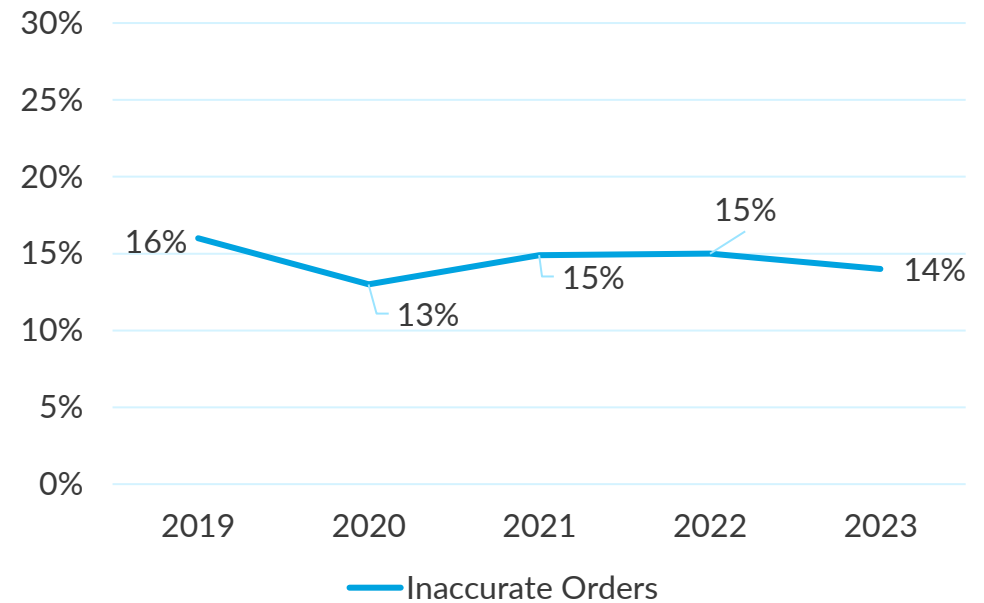


n=1491



In 2023, accurate orders were delivered 15 seconds faster* than orders filled incorrectly.

Inaccurate Orders



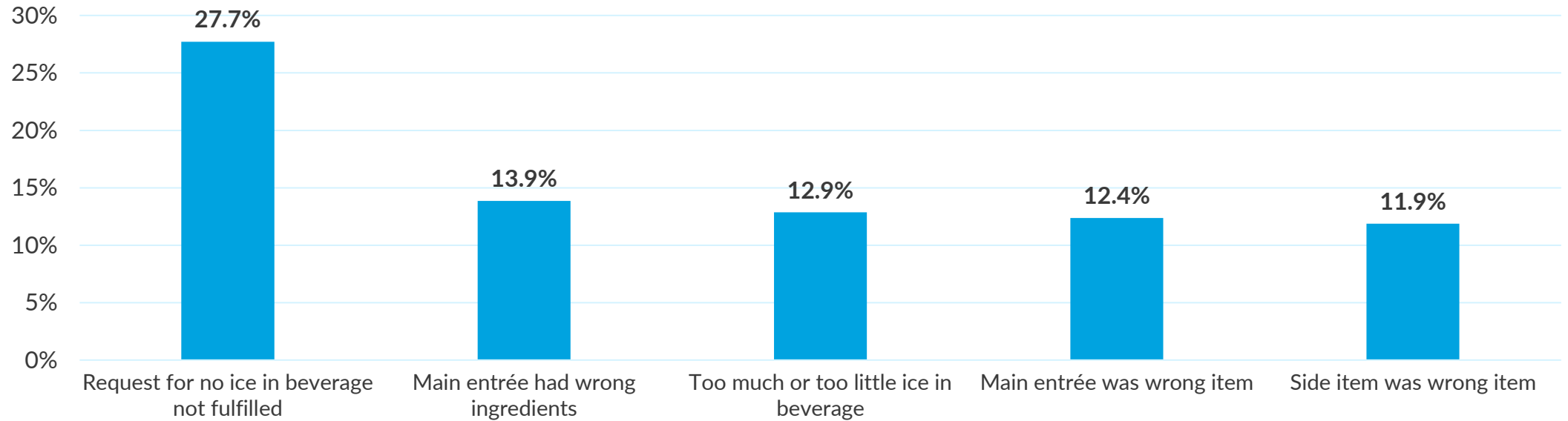
*Based on the Average Total Time.

Inaccuracies



3 out of 5 of the top issues were related to the wrong ingredients or entirely wrong item.

Top 5 issues

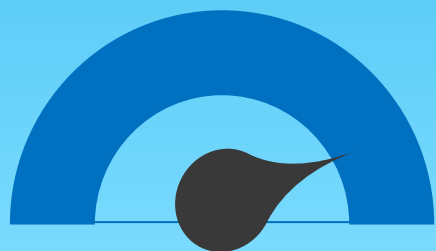




Innovation Locations



In this year's study, we examined the performance at two prototype locations, Taco Bell Defy in Brooklyn Park, Minnesota and McDonald's test restaurant located just outside Fort Worth Texas to see how they compared to this year's data.

Avg Order Accuracy
2023 Study - Overall



86%

▶ Comparison 2: Order Accuracy

	<u>Brand Overall</u>	<u>Innovation Locations</u>
	88%	80%
	85%	88%

Note: The data from the Innovation Locations is not included in the overall study results.

Inaccuracy Costs You

Based on an average meal cost of \$10.35, and a difference of 15 seconds between **accurate and inaccurate orders**, annual losses due to inaccurate orders adds up.

\$23,497.44 Potential loss per year per store unit

\$46,994,880 Per 2000 locations

\$117,487,200 Per 5000 locations

\$234,974,400 Per 10,000 locations

*Average meal cost is the average cost from this 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.

Want More?

Purchase the complete reporting package to dig deeper into accuracy:

- *Impact of order confirmation boards application & use*
- *Daypart*
- *Incorrect items on receipt*
- *Incorrect items received*
- *Incorrect items (excluding food and beverage)*
- *Labor shortages*
- *and more*

>> Contact

letschat@intouchinsight.com



Suggestive Selling

Suggestive selling is an excellent way for brands to promote new items and increase average ticket price. This year, for the first time since 2019, service time was 10 seconds slower when our shoppers reported the use of suggestive selling – highlighting the importance of efficiency when doing so.

New technology being implemented in drive-thrus, such as AI chatbots, present an opportunity to implement suggestive selling more consistently than ever, but could be a contributing factor in the increased service times.

Brands such as **Carl's Jr. and Hardee's**, both of whom were among the top 3 brands using suggestive selling this year, have implemented AI technology at many of their locations that, in reported test cases, achieved an 88% upsell offer rate to guests*. This is a 32% increase from the average number of interactions where our shoppers reported suggestive selling.

*<https://www.qsr magazine.com/technology/carls-jr-hardees-join-ai-drive-thru-revolution>

Time impacts from upsells

One of the biggest objections to the practice of suggestive selling is that it has a negative impact on time. But when inserted into the process effectively, these impacts can be minimized, and positive results can in fact be realized.

Total time was:



when the suggestive sell occurred after the order was placed instead of with the greeting.



Category Leaders: Suggestive Selling

Suggestive selling is the practice of intentionally upselling an additional item. Can be done at any time while the order is being taken (the onset of your order or after you have ordered your item).

Example: Would you care to upsize your item and make it a combo?

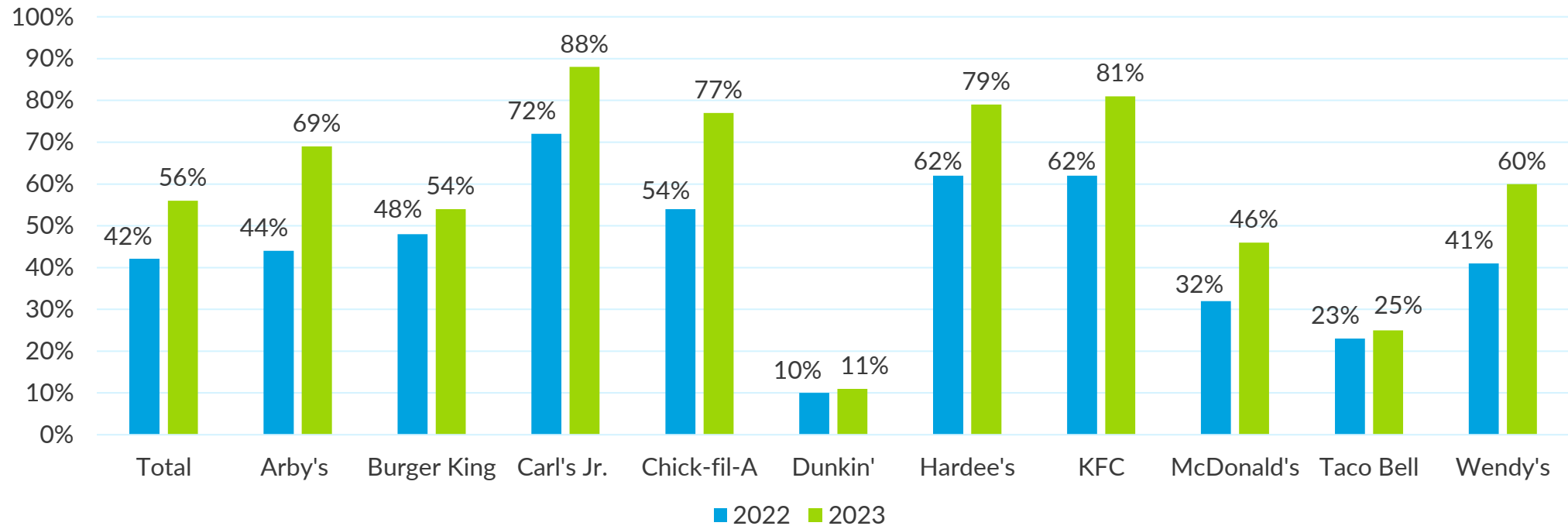
2023 Category Leader		RANK	2023	2022	2021
	1	 Carl's Jr.	 Carl's Jr.	 Carl's Jr.	
	2	 KFC	 KFC	 Arby's	
	3	 Hardee's	 Hardee's	 Chick-fil-A	
	4	 Chick-fil-A	 Chick-fil-A	 KFC	
	5	 Arby's	 Burger King	 Hardee's	



Suggestive Selling is not consistently used by brands, however overall suggestive selling has increased by 14% since 2022.

Suggestive Selling

Suggestive Selling by Brand

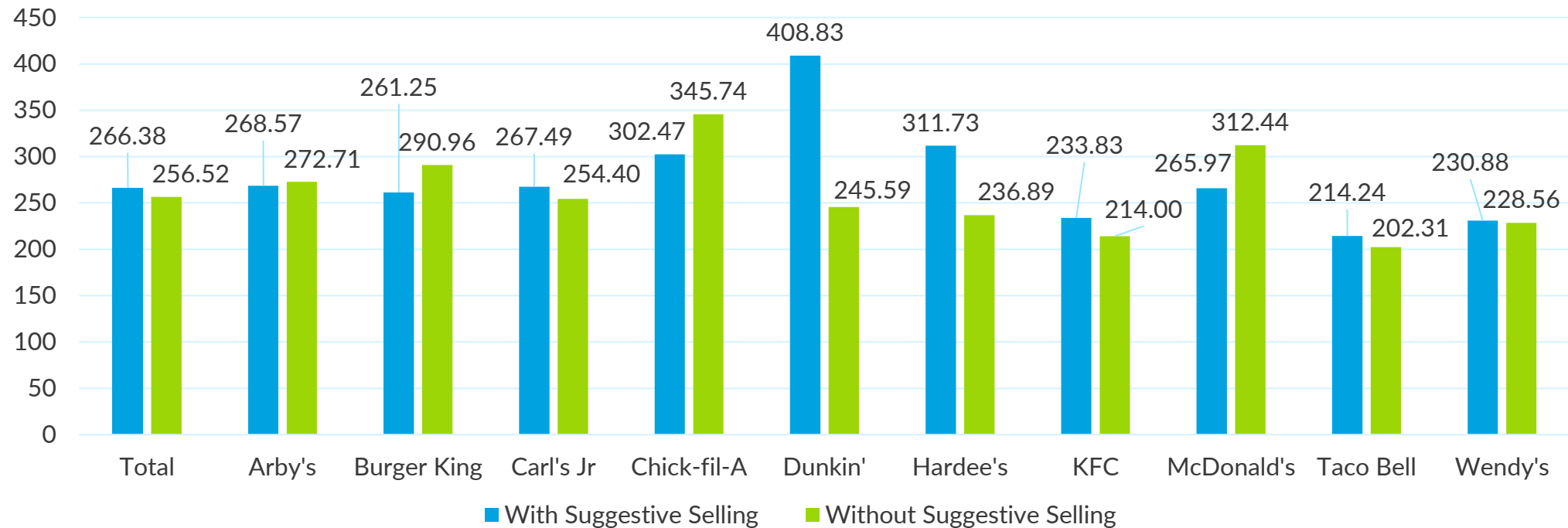




Four out of ten brands had faster service time with suggestive selling than without. Consider shifting the focus from 'if' this practice should be widely adopted, to 'how'.


Impact on Time

Average Service Time (in seconds) with Suggestive Sell



Comparison of Suggestive Selling Frequency & Time

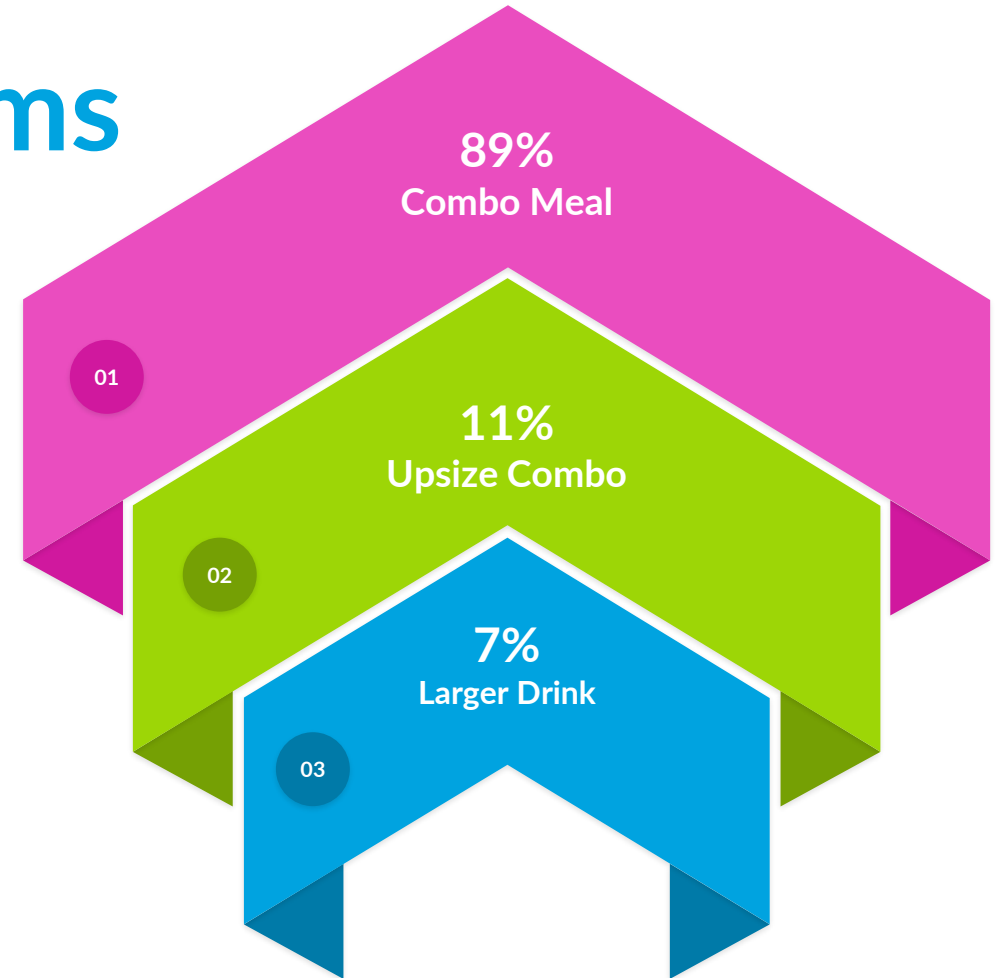
BRAND	FREQUENCY	AVG SERVICE TIME WITH SS	AVG SERVICE TIME WITHOUT SS
Carl's Jr.	88%	267.49	254.40
KFC	81%	233.83	214.00
Hardee's	79%	311.73	236.89
Chick-fil-A	77%	302.47	345.74
Arby's	69%	268.57	272.71
Wendy's	60%	230.88	228.56
Burger King	54%	261.25	290.96
McDonald's	46%	265.97	312.44
Taco Bell	25%	214.24	202.31
Dunkin'	11%	408.83	245.59

 Denotes brands where service time was faster with suggestive selling.

Top 3 Suggested Items



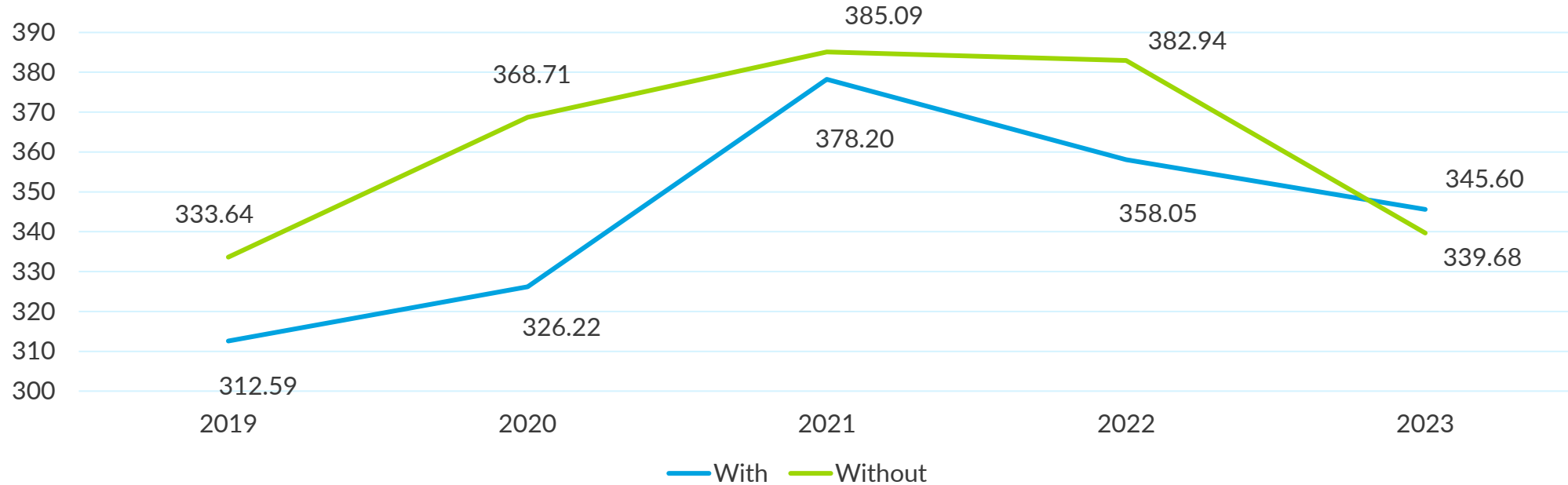
56% of shoppers were offered a suggestive sell.



Total time is the total amount of time the shopper spent in the drive-thru. Time starts when the shopper enters the drive-thru and ends once they exit with their food.

Impact on Total Time

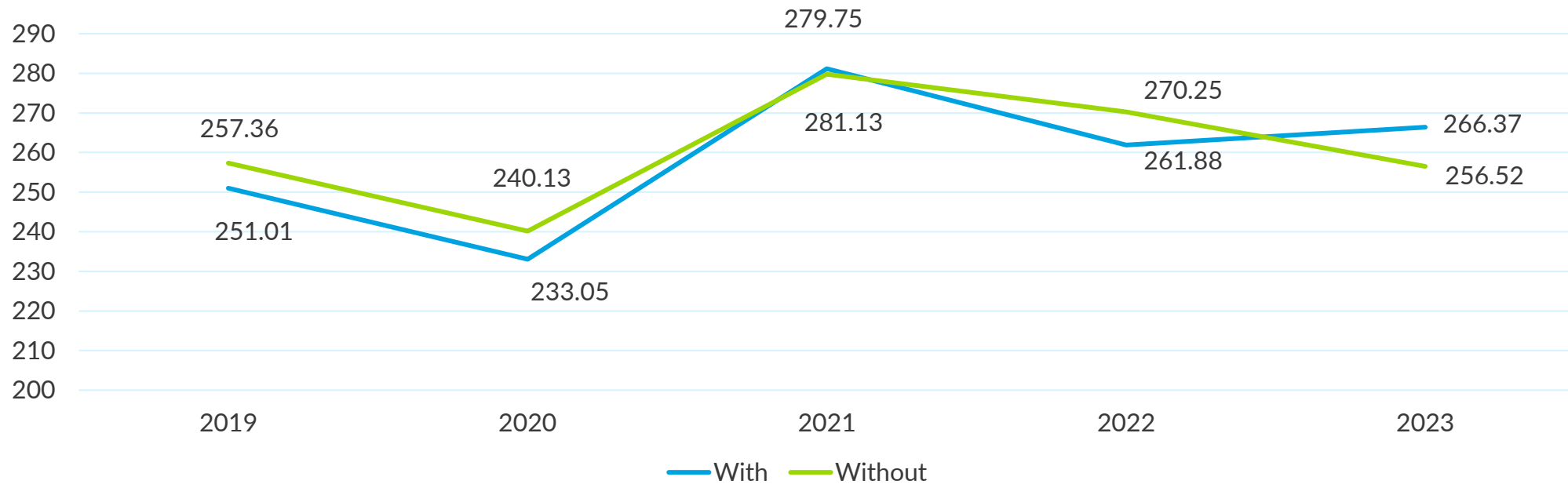
Average Total Time (in seconds) With and Without Suggestive Selling



Service time is the amount of time it took the shopper to place their order until they exit the drive-thru with their food.

Impact on Service Time

Average Service Time (in seconds) With and Without Suggestive Selling



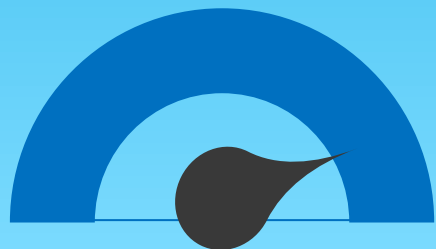


Innovation Locations



In this year's study, we examined the performance at two prototype locations, Taco Bell Defy in Brooklyn Park, Minnesota and McDonald's test restaurant located just outside Fort Worth Texas to see how they compared to this year's data.

▶ Comparison 3: Suggestive Selling

Suggestive Selling
2023 Study - Overall



56%

	Brand Overall	Innovation Locations
	46%	76%
	25%	24%

Note: The data from the Innovation Locations is not included in the overall study results.

Benefits of Suggestive Selling

On average, the total amount spent when there **was a suggestive sell** was \$10.70, compared to \$9.88 when there was not a suggestive sell.

\$43,976.21 Potential gain per year per store unit with
suggestive selling

\$87,952,420 Per 2000 locations

\$219,881,050 Per 5000 locations

\$439,762,100 Per 10,000 locations

*Average meal cost is the average cost from this study.

**Calculated with the average total time 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/gain.

Want More?

Purchase the complete reporting package to see which other data points suggestive selling has an impact on such as:

- *Amount spent*
- *Wait time*
- *Service time*
- *Total time*
- *and more*

>> **Contact**
letschat@intouchinsight.com



Food Quality

Naturally, when consumers are choosing where to eat, the food itself will be a crucial component.

As brands work to provide faster and more efficient service, food has a greater likelihood of getting to customers at the intended temperature. In this way, ongoing improvements to service time should have a positive impact on food quality scores.

In the hot seat

In this year's study the data shows that temperature has a major impact on food quality scores.

Food quality, as defined as food tasted 'as expected', was:



when food was received hot, compared to when it was not.



Category Leaders: Food Quality

Food quality ranking based on whether or not the main entrée tasted as expected. Across all brands, 94% of respondents stated that their main entrée tasted as expected.

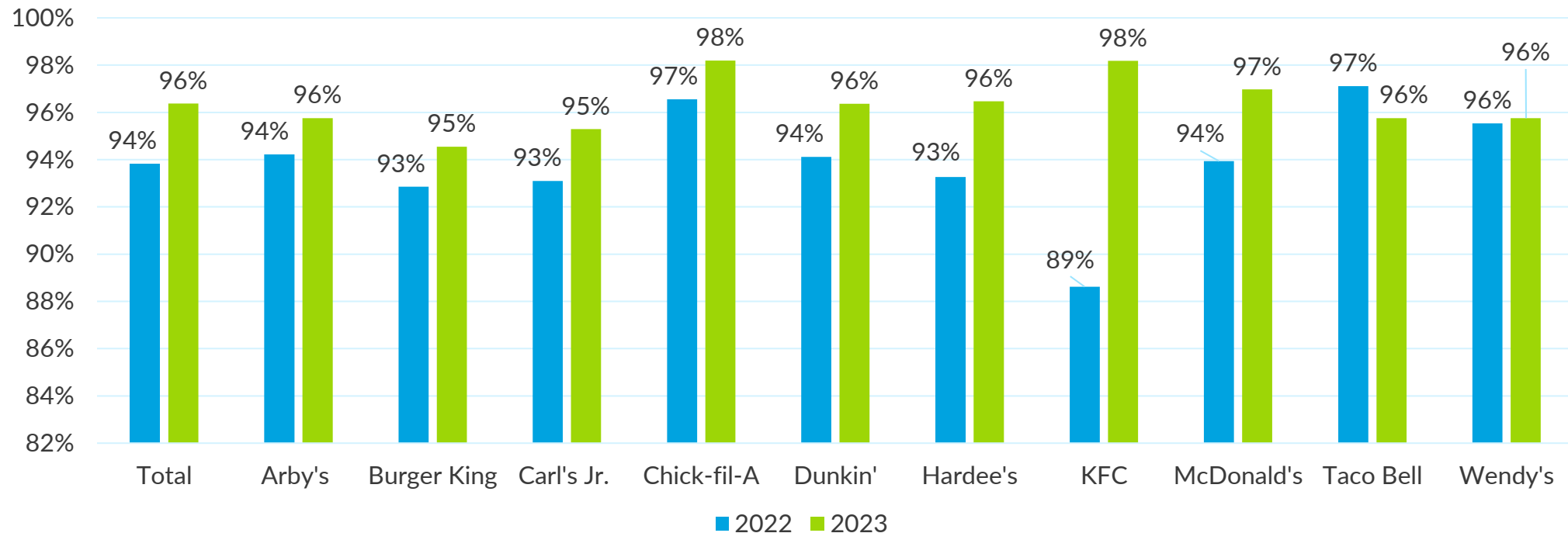
2023 Category Leader	RANK	2023	2022	2021
	1	 Chick-fil-A	<u>Tied</u>  Chick-fil-A	 Chick-fil-A
	2	 KFC	 Taco Bell	 Arby's
	3	 McDonald's	<u>Tied</u>  Arby's	 Taco Bell
	4	 Hardee's	 DUNKIN' Dunkin'	 McDonald's
	5	 DUNKIN' Dunkin'	 Wendy's	 KFC

Taste

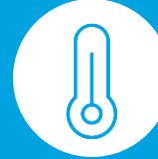


Chick-fil-A had the highest rating for taste of main item.

Taste as Expected by Brand – Main Entrée

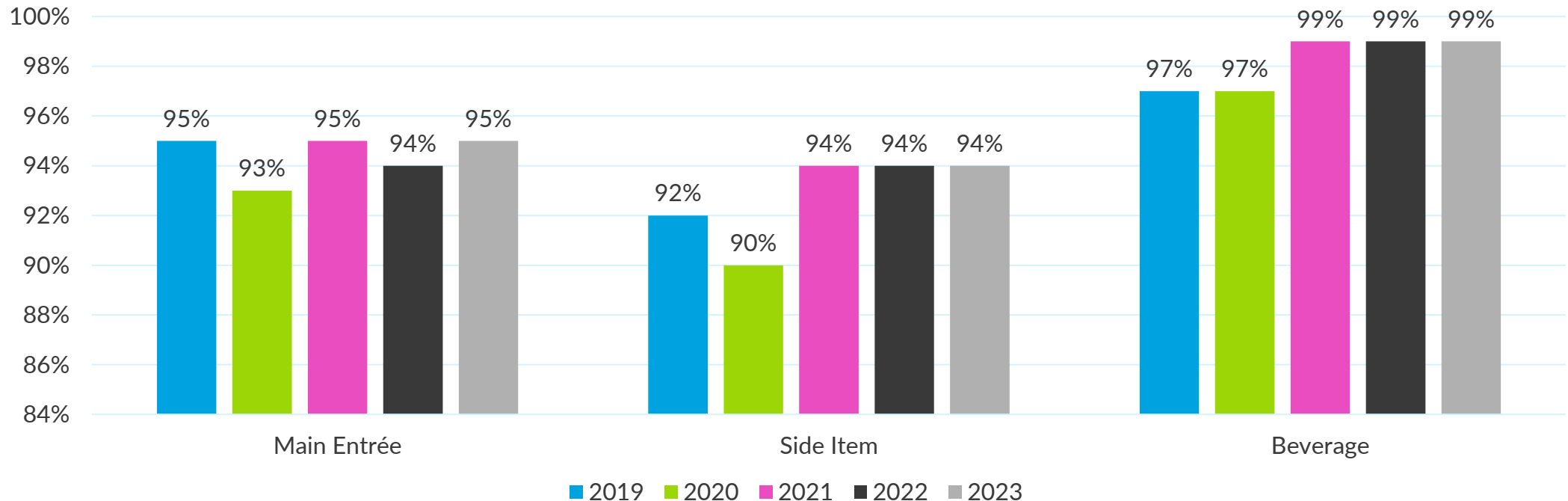


Food Temperature



Temperature was as expected for 99% of beverages, 95% of main entrées, and 94% of side items in 2023.

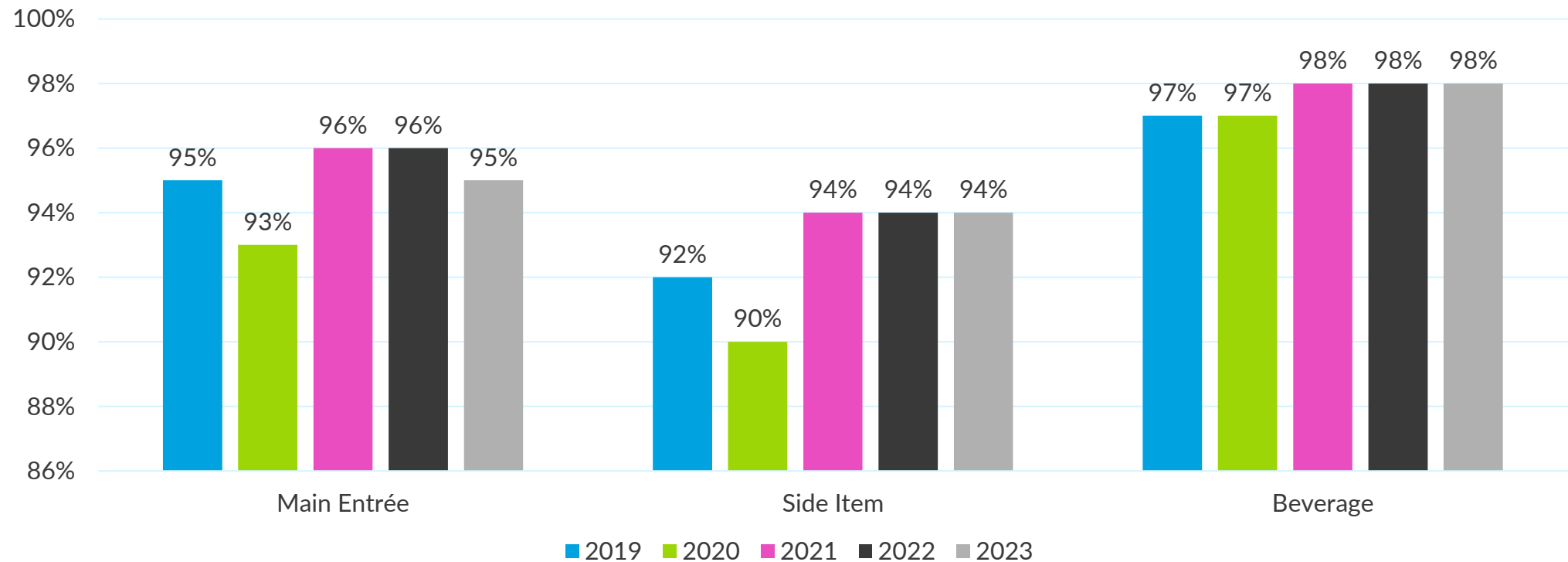
Temperature as Expected



Portion Size

 Portion size have remained consistent with customer's expectations over the past year.

Portion as Expected

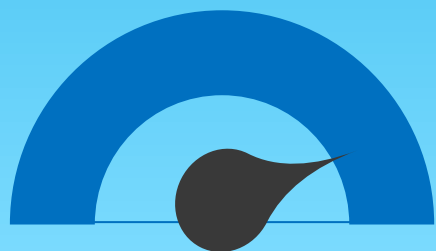




Innovation Locations



In this year's study, we examined the performance at two prototype locations, Taco Bell Defy in Brooklyn Park, Minnesota and McDonald's test restaurant located just outside Fort Worth Texas to see how they compared to this year's data.

Main Entrée Taste
As Expected
2023 Study - Overall



96%

▶ Comparison 4: Main Entrée Tasted as Expected

	Brand Overall	Innovation Locations
	97%	96%
	96%	96%

Note: The data from the Innovation Locations is not included in the overall study results.



Satisfaction

Ultimately, winning a customer's loyalty and their return business will come down to their overall satisfaction with their experience.

The average overall satisfaction with the level of service score across the brands measured in this year's study was 90%. This is a 1% increase over 2022, but **still means 1 in 10 customers were left unsatisfied with their experience.**

We found friendliness had a profound impact on overall satisfaction – as well as improving order accuracy and service time. But while friendly service increased by 1% compared to 2022, the average friendliness score was only 73%, compared to 79% in 2019, **leaving lots of room for improvement.**

The Friendliness Factor

The study demonstrates that brands with friendlier service perform better across all key metrics. Effective training, clear expectations and a positive work environment are proven to lead to employee satisfaction, and when employees are taken care of, they'll take care of your guests.

When service was perceived as friendly:

Service time was



compared to
when it was not.

Order accuracy was



compared to
when it was not.

Satisfaction was



compared to
when it was not.



Category Leaders: Satisfaction with Service

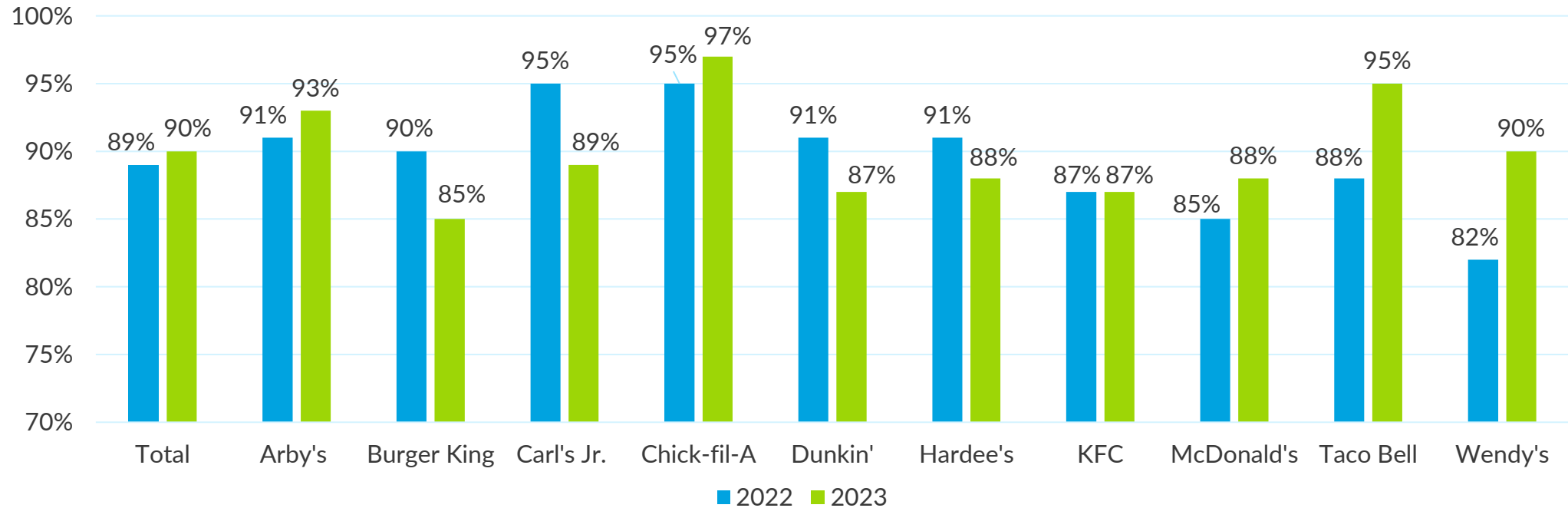
Satisfaction with Level of Service measures how satisfied shoppers were with the overall drive-thru experience, staff friendliness, and customer expectations regarding speed and experience.

2023 Category Leader	RANK	2023	2022	2021
	1	 Chick-fil-A	<u>Tied</u>  Chick-fil-A	 Chick-fil-A
	2	 Taco Bell	 Carl's Jr.	 Arby's
	3	 Arby's	<u>Tied</u>  Arby's	 Taco Bell
	4	 Wendy's	DUNKIN' Dunkin'	 McDonald's
	5	 Carl's Jr.	 Hardee's	DUNKIN' Dunkin'

 **Chick-fil-A had the highest rated satisfaction.**

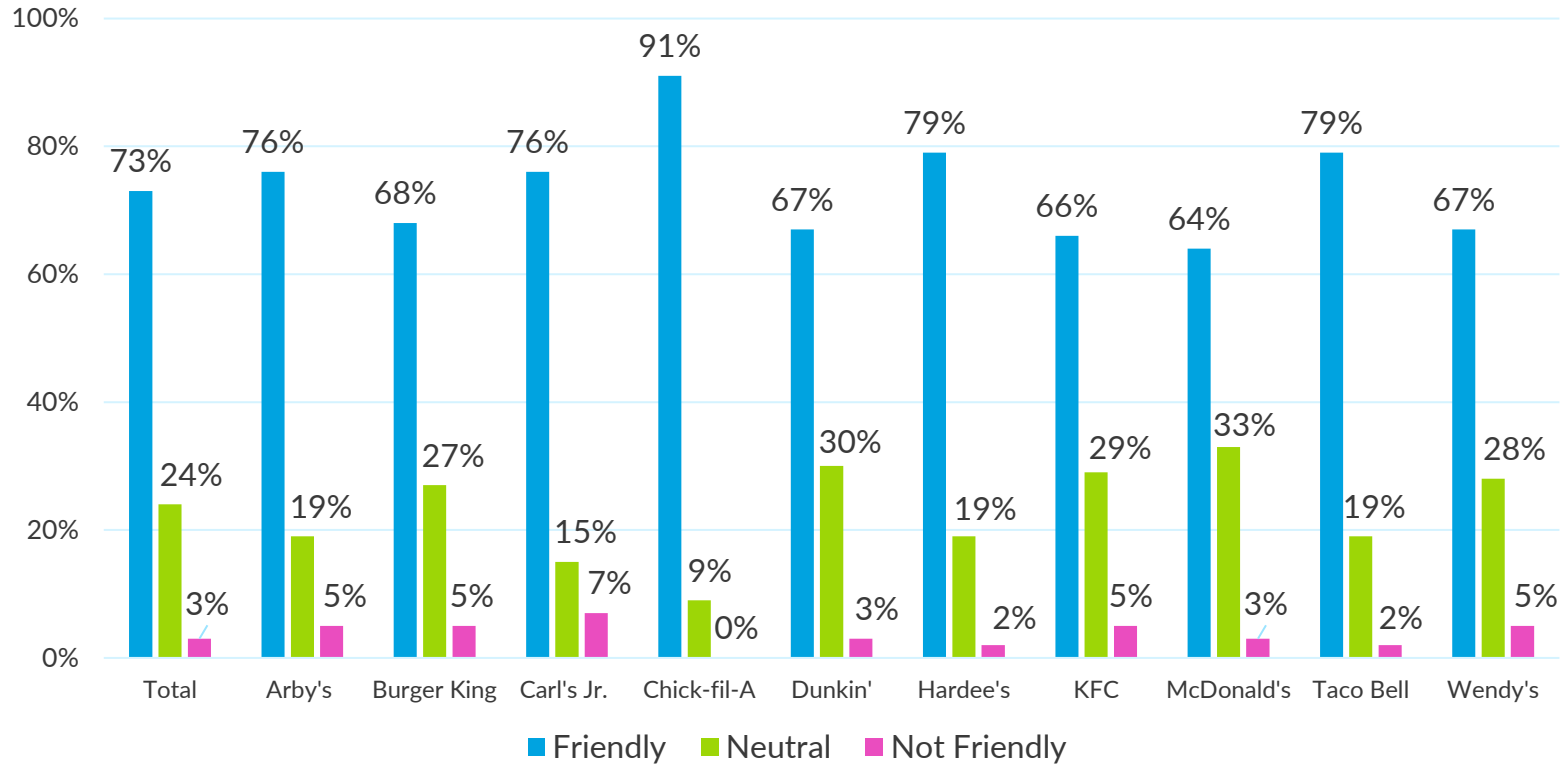
Satisfaction by Brand

Satisfaction with the Level of Service by Brand






 **4 out of 5 of the category leaders for Satisfaction also rank in the top 5 for Friendliness.**
(Chick-fil-A, Carl's Jr., Taco Bell, Arby's)

Friendliness by Brand



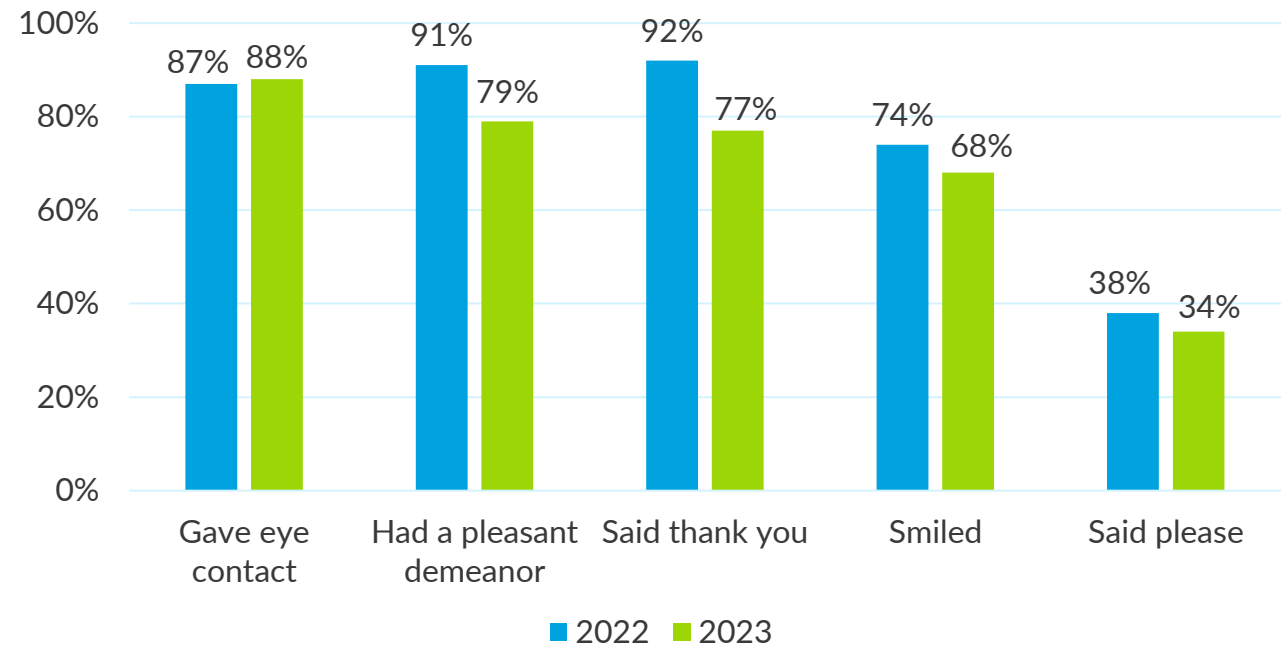
To measure friendliness, Shoppers were asked to rate the service received on the following scale:

FRIENDLY  **NEUTRAL**  **NOT FRIENDLY** 

Friendliness Attributes

Regardless of how the Shopper rated the location on being friendly, we asked them to indicate which friendliness attributes they did see demonstrated by employees.

There were two areas to note this year where scores dropped: Having a pleasant demeanor and Saying thank you.

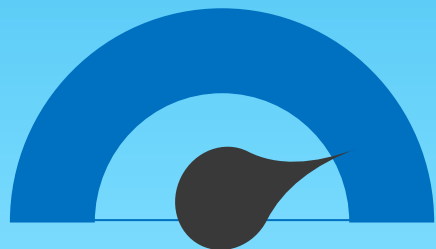




Innovation Locations



In this year's study, we examined the performance at two prototype locations, Taco Bell Defy in Brooklyn Park, Minnesota and McDonald's test restaurant located just outside Fort Worth Texas to see how they compared to this year's data.

Avg Satisfaction
2023 Study - Overall



90%

▶ Comparison 5: Satisfaction with Level of Service

	Brand Overall	Innovation Locations
	88%	100%
	95%	96%

Note: The data from the Innovation Locations is not included in the overall study results.

Unfriendliness Costs You

Based on an average meal cost of \$10.35 and a difference of 31 seconds between **friendly and unfriendly orders**, annual losses due to unfriendly staff add up.

\$47,534.72 Potential loss per year per store unit

\$95,069,440 Per 2000 locations

\$237,673,600 Per 5000 locations

\$475,347,200 Per 10,000 locations

*Average meal cost is the average cost from this 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.

Want More?

Purchase the complete reporting package to see how other data points impact satisfaction and friendliness such as:

- *Daypart*
- *Overall impressions of speed*
- *Overall impressions of friendliness*
- *Labor shortages*
- *and more*

>> Contact

letschat@intouchinsight.com

Glossary

Average total time by cars:

Calculated by dividing total time by average cars in line.

Friendliness:

To measure friendliness, Shoppers were asked to rate the service received on a three-level scale: Friendly, Neutral, Not Friendly.

Number of cars in line:

Number of vehicles in line to the speaker in the same lane as the shopper (not including the shopper's vehicle).

Order Accuracy:

Shoppers were asked a yes or no question whether their order was filled correctly and completely, including special requests.

Order Confirmation Board (OCB):

Order confirmation board that displays the customer's order during the order taking process. Typically located around, or incorporated into, the menu board.

Pre-sell Menu Board (PMB):

Permanent sign positioned several feet in front of the speaker and primary board, intended to give customers an opportunity to check the restaurant's offerings prior to reaching the order point.

Satisfaction with Level of Service:

Satisfaction with Level of Service measures how satisfied shoppers were with the overall drive-thru experience, staff friendliness, and customer expectations regarding speed and experience. Shoppers were asked to select if they were Satisfied or Not Satisfied.

Service time:

Amount of time it took the shopper to place their order until they exit the drive-thru with their food.

Suggestive Selling:

The practice of intentionally upselling an additional item. Can be done at any time while the order is being taken (the onset of your order or after you have ordered your item).

Example: Would you care to upsize your item and make it a combo?

Total time:

Total amount of time the shopper spent in the drive-thru. Time starts when shopper enters the drive-thru and ends once they exit with their food.

Wait time:

Amount of time from when the shopper enters the drive-thru line to when they start to place their order.