



Emerging Experiences:

AI-Drive Thru, Mobile Ordering, and Kiosks

In partnership with: **QSR**

2025 ANNUAL

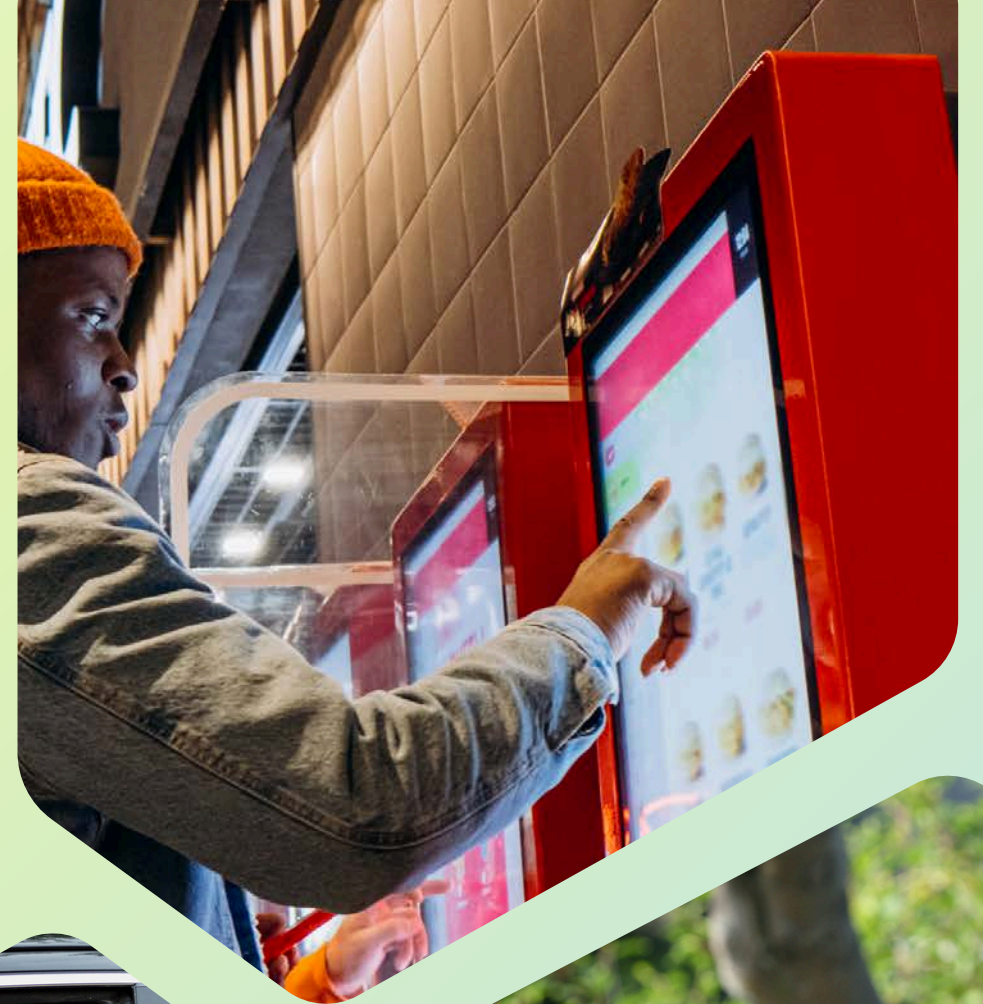




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Executive Summary

Quick service restaurants (QSRs) continue to embrace innovation, with emerging and evolving technologies reshaping not just how orders are placed, but how guests experience every step of their journey. From mobile ordering to in-store kiosks and now AI-powered drive-thrus, the digital transformation is accelerating, fundamentally changing what customers expect from their visit.

With digital channels projected to account for up to 70% of total QSR sales by the end of 2025¹, the stakes for getting these experiences right are higher than ever.

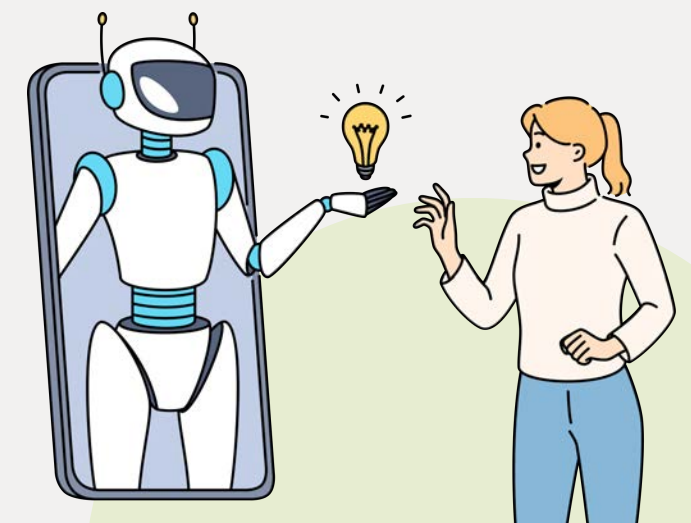
That's why this year, Intouch Insight's Emerging Experiences Study didn't just revisit mobile and kiosk ordering. We significantly expanded our evaluation of AI voice-ordering in drive-thrus, marking our most in-depth look at this fast-evolving technology to date.

To understand how these innovations are performing in the real world, we conducted 360 mystery shops across nine top QSR brands. Each visit was designed to test emerging formats against traditional benchmarks on key performance metrics—like speed, accuracy, friendliness, and satisfaction.

Dive into the Emerging Experiences 2025 Study to find out where innovation is driving impact, where it still falls short, and what brands need to focus on next to stay ahead of the curve.

Key Insights

- **AI-powered drive-thrus delivered faster service**
Voice AI outperformed traditional benchmarks on speed, with quicker wait, service, and total times across all measured brands.
- **Mobile ordering significantly improved efficiency**
Pickup times were reduced by up to 3.5 minutes compared to traditional methods, both in-store and in the drive-thru.
- **Satisfaction held steady across innovation formats**
All three emerging experiences, Voice AI, Mobile Order for Pickup, and Kiosk—achieved overall satisfaction scores at or above 89%, closely matching or exceeding legacy benchmarks.

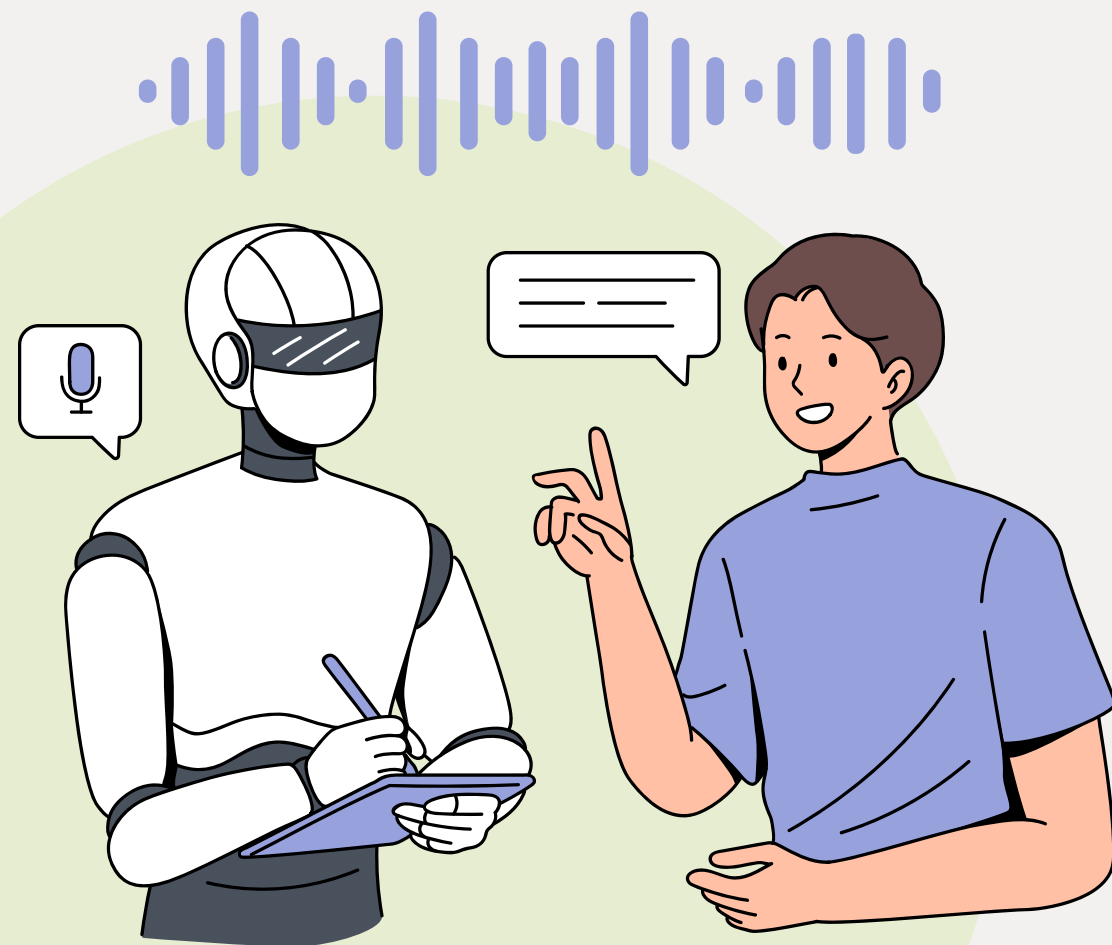


¹ <https://www.foodindustry.com/articles/how-big-fast-food-chains-are-going-digital/>

About the Study

Intouch Insight's third edition of the Emerging Experiences Study examines the impact that technology is having on the guest experience. To assess how emerging ordering technologies are performing, we compared customer experiences at nine leading QSR brands.

Through this study, we aim to provide multi-location restaurants with directional data that can help shed light on how the various technologies evaluated are evolving the guest experience at QSRs.



Methodology

This study was conducted in January 2025, with shops taking place during lunch or dinner. For each participating brand, we conducted 40 mystery shops, evaluating customer experiences with emerging ordering technologies, including:

- AI-Voice Ordering technology in the drive-thru,
- Mobile ordering for pickup in drive-thru or in-store, and
- In-store kiosk ordering

Shoppers were instructed to order a main item, a side item, and a beverage to ensure consistency across visits, and to make a customization to their order. To benchmark performance against traditional experiences, findings from this study were compared to data from the 2024 Annual Drive-Thru Study and the 2025 On-Premises Benchmark Study.

Brands Included in the Study

Experience	Emerging Experiences Brands Evaluated	Benchmark Comparison
1. Voice AI- Ordering in the Drive Thru	  	2024 Drive-Thru Study
2. Mobile Order for Pickup in Drive-Thru / In- Store	  	2024 Drive-Thru Study & 2025 On-Premises Study
3. In-Store Kiosk Ordering	  	2025 On-Premises Study

Drive-Thru Study:

For 24 years, our **Annual Drive-Thru Study** has set the standard for measuring drive-thru performance. Using real-time, unannounced mystery shops instead of consumer surveys, we capture key metrics like speed, accuracy, and customer satisfaction across 10 leading QSR brands. In 2024, we completed 1,651 visits across the U.S. between June and July.

On-Premises Study:

The newest addition to Intouch Insight’s line-up of industry studies, the **2025 On-Premises Study** evaluates the guest experiences of ten leading QSR and Fast Casual chains. In this study, we evaluate the guest experiences of traditional in-store orders placed at the counter with an employee and evaluate key metrics across service, speed, accuracy, and quality of the experience.



Definitions

Wait Time: The amount of time passed from the time you entered the drive-thru line until you reached the speaker and started to place your order.

Service Time: The amount of time passed from placing your order until you reached the food pick-up window.

Total Time for Drive-Thru: The amount of time passed from entering the drive-thru to receiving your entire order.

Total Time for Kiosk: The amount of time passed from entering the store and joining the line to enter the kiosk to receive your entire order.

Total Time for On-Premises: The amount of time passed from entering the store and joining the line to receive your entire order.

Total Time for Mobile Drive-Thru: The amount of time passed from entering the drive-thru to receiving your entire order.

Total Time for Mobile In-Store: The amount of time passed from entering the store to receiving your entire order.

Experience 1:

Voice AI- Drive Thru



Experience 1: Voice AI-Drive Thru

The restaurant AI market, which includes technologies like voice assistants, predictive analytics, and automation tools, is expanding quickly. Valued at \$9.68 billion in 2024, it's expected to grow to \$49 billion over the next five years as restaurants continue investing in tools that improve efficiency and enhance the guest experience². In drive-thrus, AI is already reshaping how orders are placed and optimizing the employee workflows and labor utilization inside the restaurant.

Voice AI ordering, in particular, allows customers to place orders without interacting with an employee, and as the technology advances, it's also opening doors to greater accessibility—supporting multiple languages today and potentially enabling new ways to communicate, such as ordering through sign language, in the future.

What we measured:

- **Innovation Experience:** Shoppers entered the drive-thru and used a Voice-AI ordering system to place their orders.
- **Benchmark:** Data from the 2024 Drive-Thru Study, where shoppers placed their orders with an employee.



Key Findings

- **Voice-AI drive-thrus outperformed** the 2024 Benchmark in **speed of service with faster wait, service, and total times.**
- **Food temperature** was a strength, with **two brands scoring 100%**, likely due to quicker service.
- **Voice AI** matched the **friendliness benchmark for order-taking (79%)** and **exceeded it at pickup (83% vs. 79%).**

These results show that **automated ordering** can meet guest expectations for **politeness and professionalism** — **while also helping staff deliver friendlier service at pickup**. By handling routine tasks like order-taking, Voice AI allows employees to focus on micro-moments with customers, leading to a more consistent and positive experience.

² <https://www.qsr magazine.com/story/revolutionizing-the-restaurant-sector-with-artificial-intelligence-in-2024/>

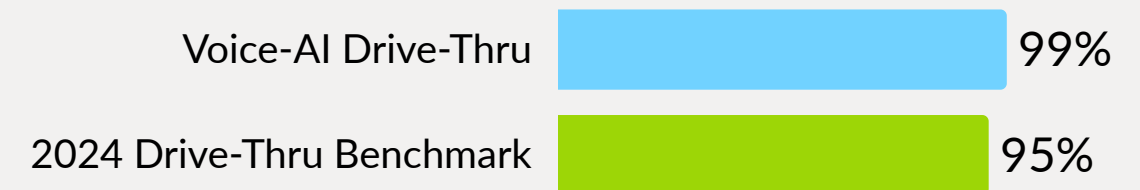
Experience 1: Voice AI-Drive Thru

	Voice-AI Drive-Thru	2024 Drive-Thru Benchmark (not AI)
Overall Satisfaction	93%	94%
Friendliness	83%	79%
Total Time	5 minutes and 17 seconds	5 minutes and 29 seconds
Order Accuracy	83%	89%

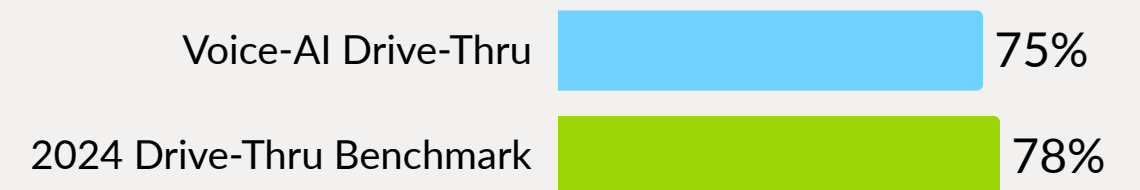


65% of order inaccuracies were due to the AI's inability to address the customization request.

The interaction with the speaker clear and understandable



Shopper did not have to repeat the order



Shopper was offered a suggestive sell

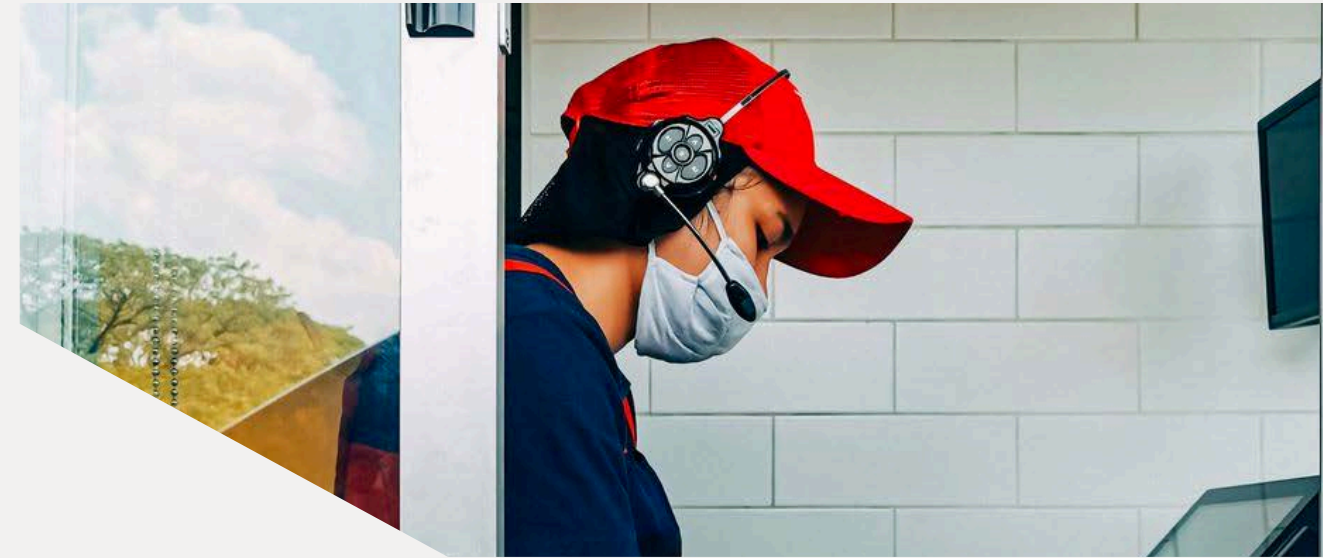


Employee Intervention in AI-Assisted Orders

Across 120 drive-thru visits at locations where Voice AI ordering was confirmed to be in use, the system was able to fully complete the order without assistance in 89 visits.

An employee had to step in to assist or complete the order in 26 of the 120 visits. This represents a 22% Employee Intervention Rate.

Among those who experienced this transition from AI to a human, 42% cited glitches in the AI system as the reason for the handoff.

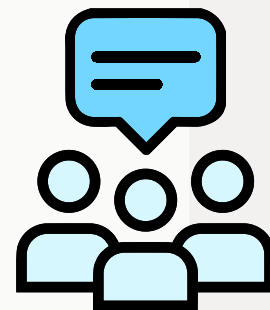


Key Shopper Feedback: AI to Employee Transitions

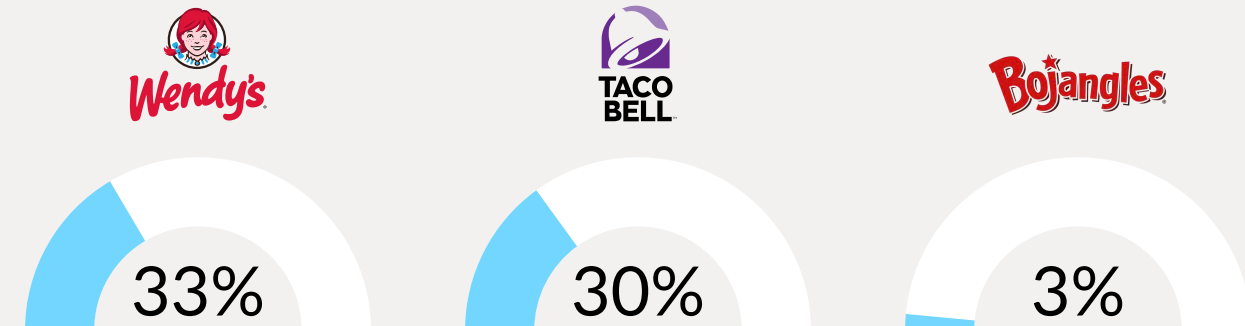
“Interaction with AI was not very smooth — it started taking orders and then transferred them to associates.”

“The AI added five salads to my order — I had to speak up, and a human confirmed I only wanted one of each item.”

“I tried to modify my order, but AI kept saying it wasn't available. The staff eventually answered and said, ‘We got you, sir.’”



Employee Intervention Rate

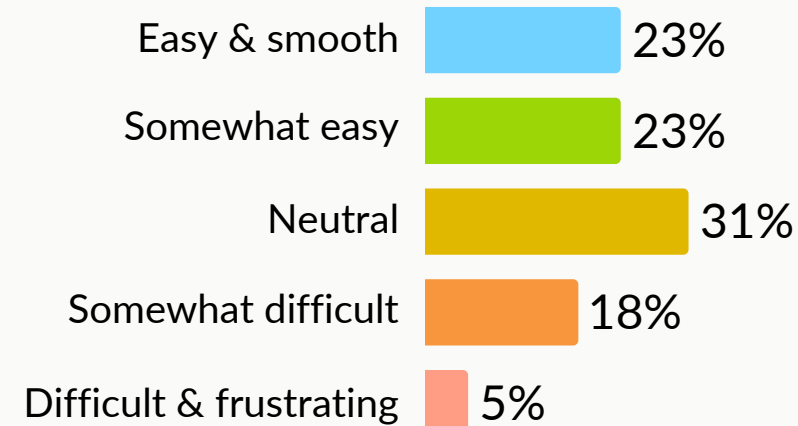


These insights underscore the importance of monitoring **AI performance in real-world scenarios**. While automation can streamline service, inconsistencies, particularly around order customization and recognition, can undermine the guest experience and require human support.

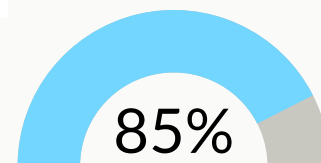
Voice AI Through the Customer Lens

When it comes to Voice AI ordering, Bojangles is leading the way — with 67% of shoppers describing their experience as “easy and smooth.” Taco Bell also performs well at 57%, while Wendy’s trails at just 23%, with nearly a quarter of shoppers reporting a difficult experience.

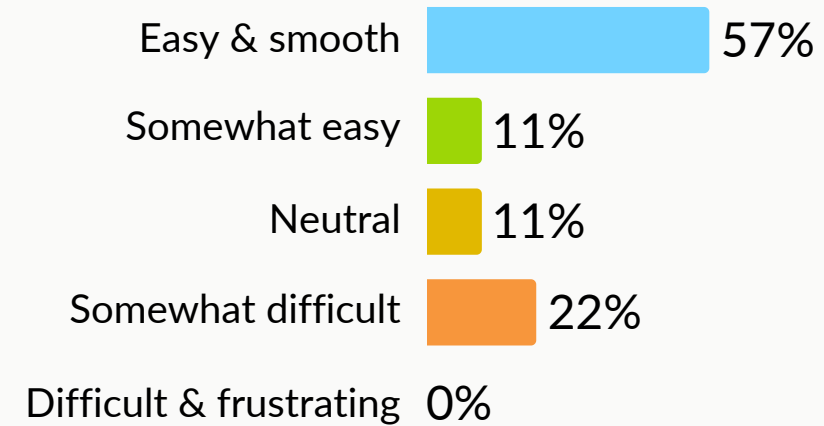
Overall, how would you rate the interaction with the Voice AI Ordering System?



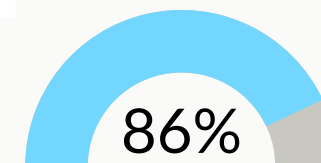
Percentage of customers who felt the AI's tone was friendly



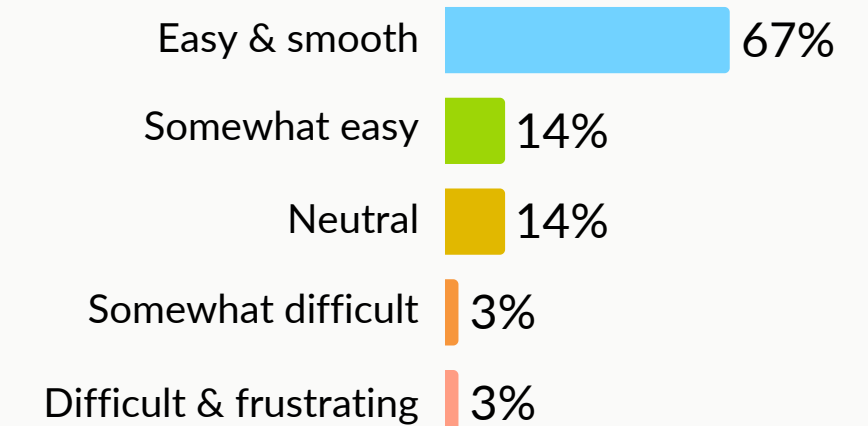
Overall, how would you rate the interaction with the Voice AI Ordering System?



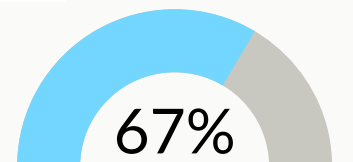
Percentage of customers who felt the AI's tone was friendly



Overall, how would you rate the interaction with the Voice AI Ordering System?



Percentage of customers who felt the AI's tone was friendly





In the Spotlight: Wendy's

Wendy's launched its FreshAI voice-ordering system in 2023 and has since expanded it to additional locations, with more planned. Designed to improve drive-thru efficiency, the system processes orders in multiple languages and assists with order-taking, allowing staff to focus on other tasks.

	Wendy's	Benchmark ¹
Overall Satisfaction	93%	94%
Order Accuracy	80%	89%
Friendliness	90%	79%

¹Benchmark data is from the Intouch Insight 2024 Drive-Thru Study

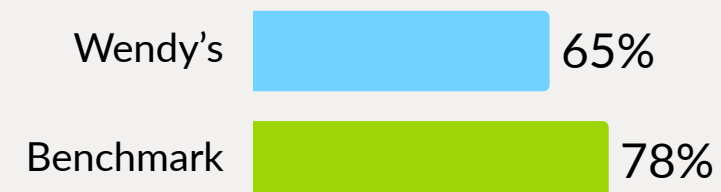
Brand Performance Highlights

The **Voice-AI** locations scored a perfect **100%** for the **temperature of the main item**.

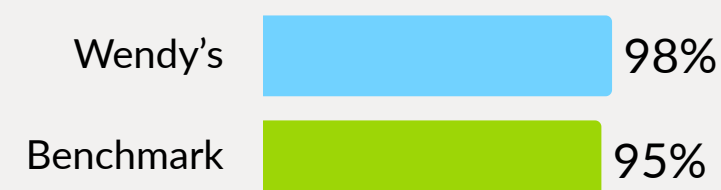
The Voice-AI locations had shorter **wait time, service, and total time** compared to the benchmark study.

Friendliness scored higher at the **Voice-AI** locations compared to the benchmark drive-thru study.

Shopper did not have to repeat the order



The interaction with the speaker clear and understandable



Total Time

Wendy's	Benchmark
5 minutes and 6 seconds	5 minutes and 29 seconds

Shopper was offered a suggestive sell





In the Spotlight: Taco Bell

Taco Bell is doubling down on innovation with the rollout of AI-powered voice ordering across hundreds of U.S. drive-thru locations. Already in use across multiple locations, this cutting-edge technology is designed to elevate the guest experience while streamlining operations for staff. By embracing Voice AI, Taco Bell is reimagining what the drive-thru can be: faster, more accurate, and more enjoyable for customers on the go.

	Taco Bell	Benchmark ¹
Overall Satisfaction	95%	94%
Order Accuracy	93%	89%
Friendliness	85%	79%

¹Benchmark data is from the Intouch Insight 2024 Drive-Thru Study

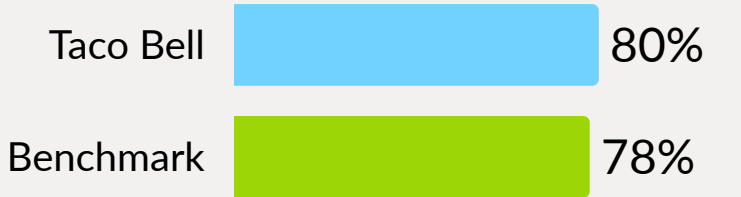
Brand Performance Highlights

Voice-AI locations achieved a perfect score (100%) for both speaker quality and the taste of the main item.

Voice-AI locations exceeded benchmark averages across key metrics like taste, food temperature, order accuracy, speed of service, friendliness, and overall satisfaction.

Even with more cars in line on average, Taco Bell's Voice-AI drive-thrus reduced service time by 1 minute and 54 seconds compared to the benchmark study.

Shopper did not have to repeat the order



The interaction with the speaker clear and understandable



Total Time

Taco Bell	Benchmark
5 minutes and 15 seconds	5 minutes and 29 seconds

Shopper was offered a suggestive sell





In the Spotlight: Bojangles

Bojangles’ AI assistant, Bo-Linda, is now in place at around 200 locations, with more added regularly. Using natural language processing and voice recognition, Bo-Linda handles orders while also relaying key information from employees, such as wait times and out-of-stock alerts, directly to customers.

	Bojangles	Benchmark ¹
Overall Satisfaction	90%	94%
Order Accuracy	78%	89%
Friendliness	73%	79%

¹Benchmark data is from the Intouch Insight 2024 Drive-Thru Study

Brand Performance Highlights

Wait time was 40 seconds faster at the Voice-AI locations compared to the 2024 Drive-Thru Study.

Shoppers at Voice-AI locations gave the temperature of the main item a perfect score of 100%, highlighting strong execution on food quality.

Technology is doing its job – delivering 100% speaker clarity and driving more suggestive selling than the 2024 Benchmark.

Shopper did not have to repeat the order



The interaction with the speaker clear and understandable



Total Time

Bojangles	Benchmark
5 minutes and 30 seconds	5 minutes and 29 seconds

Shopper was offered a suggestive sell



Experience 1: Voice AI-Drive Thru

Final Thoughts

AI-powered voice ordering is helping drive-thrus operate more efficiently without sacrificing the customer experience. **Locations using Voice-AI outperformed traditional benchmarks on speed of service, with shorter wait and total times across the board.** This added efficiency likely contributed to higher satisfaction with food temperature, where some brands achieved perfect scores.

Beyond speed, Voice-AI ordering also performed well in areas like friendliness and communication. Customers found the tone of the AI to be friendly, and the pickup experience with employees was rated even more positively. Most were able to customize their orders and get their questions answered with ease, leading to strong satisfaction scores overall.



Insights from the Field: *What shoppers had to say*



"The ordering process went easier than I thought it was going to with the AI speaker"

"I enjoyed it very much. AI is exciting in all its uses, but the most memorable was being welcomed by AI."

For restaurant operators, this signals a significant opportunity. AI can help speed up service and reduce bottlenecks, but long-term success depends on getting the details right. Smooth transitions between AI and staff, high levels of accuracy, and a strong focus on the overall customer experience will be essential for driving adoption and delivering results.

Experience 2:

Mobile Order for Pickup in Drive- thru / In-store



Experience 2: Mobile Order for Pickup in Drive-thru / In-store

As mobile ordering has become a norm, restaurants have increasingly combined digital orders with drive-thru or in-store pickup options. This evolution aligns with consumer behavior, **as nearly 90% of mobile internet usage occurs within apps³**, driving significant investments into dedicated pickup lanes and streamlined operations that reduce wait times and enhance customer satisfaction.

What we measured:

- **Innovation Experience:** Shoppers drove to the restaurant and parked. They then placed their order through the restaurant's mobile app for pickup.
- **Drive-Thru Benchmark:** Benchmark numbers from the 2024 Drive-Thru study where shoppers entered the drive-thru and placed their order with an employee.
- **On-Premises:** Benchmark numbers from the 2025 On-Premises Benchmark study where shoppers entered the store and placed their order at the counter with an employee.

Instructions Matter

Whether or not customers were told how to pick up their order made a noticeable impact on the experience. **Clear pickup instructions were provided at 91% of drive-thru pickup locations, compared to just 78% of in-store pickup experiences.**

Key Findings

→ Drive-Thru Pick-up Orders

Mobile ordering reduced time spent in the drive-thru by 1 minute and 54 seconds compared to the benchmark, and accuracy scores were on average two percentage points higher than the drive-thru study benchmark.

→ In-store Pick-up Orders

Mobile ordering cut in-store wait times by 3 minutes and 31 seconds compared to traditional ordering. Friendliness ratings increased by 6 percentage points, with customers greeted 14 percentage points more often and receiving parting remarks 15 percentage points more frequently.

- **Only 57% of mobile pickup shoppers saw an upsell offer**, compared to 64% in drive-thru and 75% On-Premises. This points to a **gap in app UX** where upsells could be better integrated.

³ <https://www.mobiloud.com/blog/mobile-apps-vs-mobile-websites>

Behind the App: What Mobile Guests Really Experience

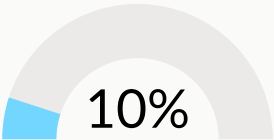
Mobile-ordering has quickly become one of the most important channels in quick-service dining, and with good reason. It promises speed, convenience, and personalization. But as more guests turn to apps to place their orders, the question isn't just if the technology works, it's how well the overall experience holds up from screen to pickup.

While 95% of users said they were able to customize their order, other elements of the journey reveal some critical gaps in consistency and communication.

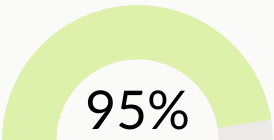
Here's how the experience breaks down across two major touchpoints:

Ordering Experience

Glitches in ordering process



Ability to customize order



Drive-Thru Pickup Experience

Did the employee confirm what was in your order when you got to the speaker/window?



Satisfaction with Pickup Experience

In-Store Pickup	95%
Drive-Thru Pickup	89%

Satisfaction with Speed of Service

In-Store Pickup	88%
Drive-Thru Pickup	89%



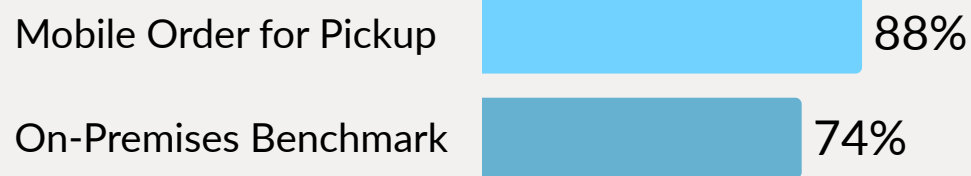
Experience 2: Mobile Order for Pickup in Drive-thru / In-store

	Mobile Order for Pickup	Drive-Thru Benchmark	On-Premises Benchmark
Friendliness	79%	79%	78%
Order Accuracy	90%	89%	95%
Temperature of main item	94%	97%	99%
Total Time in the Drive-Thru	3 minutes and 34 seconds	5 minutes and 29 seconds	N/A
Time Spent In-Store until food was received	3 minutes and 29 seconds	N/A	7 minutes and 1 second



Across both pickup methods, **Overall Satisfaction for Mobile Order for Pickup reached 94%**, matching the scores from both the **Drive-Thru Study** and **On-Premises Study** benchmarks.

Shopper was greeted or acknowledged upon entering the location



Shopper was offered a parting remark before leaving the store





In the Spotlight: Dutch Bros

Dutch Bros has built its business around drive-thru, tapping into growing consumer demand for speed and convenience. Today, more than a quarter of coffee shop visits happen at the drive-thru, and the majority of customers prefer it over going inside. With over 1,000 stores nationwide, Dutch Bros continues to stand out by making drive-thru the core of its customer experience.

	Dutch Bros	Benchmark ¹
Overall Satisfaction	95%	94%
Order Accuracy	93%	89%
Friendliness	90%	79%

¹Benchmark data is from the Intouch Insight 2024 Drive-Thru Study

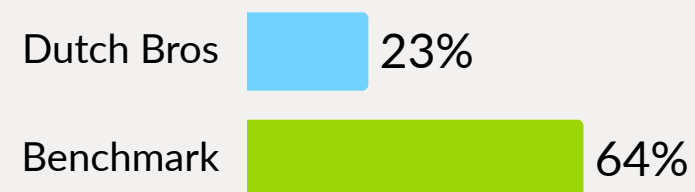
Brand Performance Highlights

Friendliness scored 11 percentage points higher at Dutch Bros compared to the Drive-Thru Study benchmark.

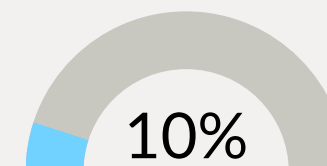
The **average total time** spent in the drive-thru was **59 seconds faster** than the Benchmark.

Taste scored a perfect 100%.

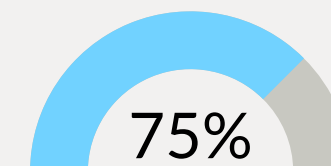
Shopper was offered a suggestive sell



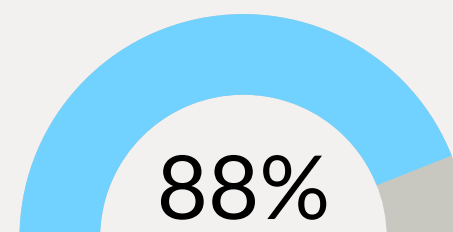
Glitches in Ordering Process



Employee Re-Confirming Order at Speaker/Window



Satisfaction with Speed of Service



Total Time in the Drive-Thru

Dutch Bros	Benchmark
4 minutes and 29 seconds	5 minutes and 29 seconds



In the Spotlight: Chipotle

Chipotle has introduced a new format to meet changing customer habits: the Chipotlane. Unlike traditional Chipotle locations, these drive-thru pickup lanes are built for digital orders placed through the app or website. Chipotle now operates more than 1,000 Chipotlanes across the U.S. The format is designed to increase convenience by allowing guests to skip the line and pick up their meal without leaving the car. It represents a shift that blends digital ordering with physical access, offering a new kind of drive-thru experience called phygital for the brand.

	Chipotle	Benchmark ¹
Overall Satisfaction	93%	94%
Order Accuracy	90%	89%
Friendliness	63%	79%

¹Benchmark data is from the Intouch Insight 2024 Drive-Thru Study

Brand Performance Highlights

Average total time spent in the drive-thru was **reduced by 2 minutes and 48 seconds**.

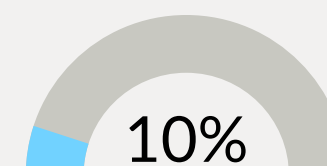
Order accuracy was **1 percentage point higher** at Chipotle compared to the Drive-Thru Study benchmark.

Only **63% of shoppers** rated their interaction as **friendly**, 16 percentage points below the benchmark of 79%.

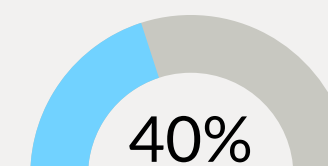
Shopper was offered a suggestive sell



Glitches in Ordering Process



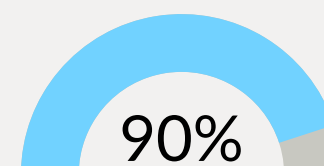
Employee Re-Confirming Order at Speaker/Window



Total Time in the Drive-Thru

Chipotle	Benchmark
2 minutes and 40 seconds	5 minutes and 29 seconds

Satisfaction with Speed of Service



Chipotle delivered standout speed, **cutting total drive-thru time by 2 minutes and 48 seconds**. For comparison, **Taco Bell** was the fastest in our 2024 Drive-Thru Study at **4 minutes and 15 seconds**, making **Chipotle's result notably faster**.



In the Spotlight: Wingstop

Wingstop’s digital strategy is delivering results. While Dutch Bros and Chipotle implemented mobile order pickup through the drive-thru, Wingstop offers in-store pickup. By channeling mobile orders inside the restaurant, they’ve created a streamlined process that supports both operational efficiency and guest satisfaction. With 70 percent of systemwide sales now coming through digital channels, Wingstop is proving that a strong digital foundation can enhance the in-store experience and keep things moving, without sacrificing the human touch.

	Wingstop	Benchmark ¹
Overall Satisfaction	95%	94%
Order Accuracy	88%	95%
Friendliness	84%	78%

¹Benchmark data is from the Intouch Insight 2025 On-Premises Study

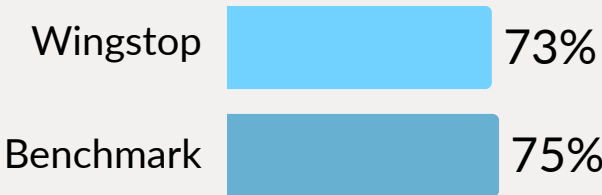
Brand Performance Highlights

Total time spent in store on average was 3 minutes and 31 seconds faster for mobile orders compared to the On-Premises benchmark.

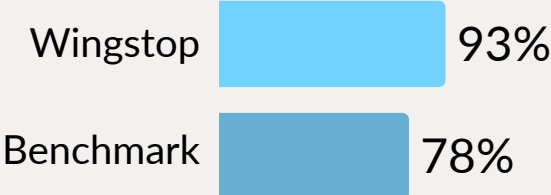
Friendliness ratings were notably higher for mobile orders, with an overall increase of 6 percentage points.

Shoppers were greeted upon arrival 14 percentage points more often compared to the On-Premises benchmark.

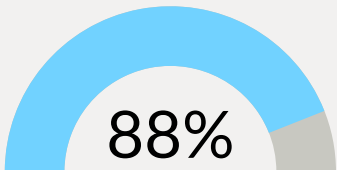
Shopper was offered a suggestive sell



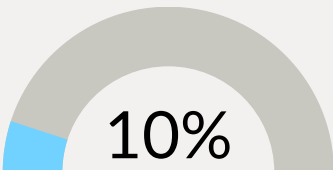
Shopper was offered a parting remark before leaving the store



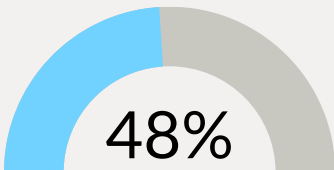
Satisfaction with Speed of Service



Glitches in Ordering Process



Signage Indicating Pickup Area



Time Spent In-Store until food was received

Wingstop	Benchmark
3 minutes and 29 seconds	7 minutes and 1 second

Experience 2: Mobile Order for Pickup in Drive-thru / In-store

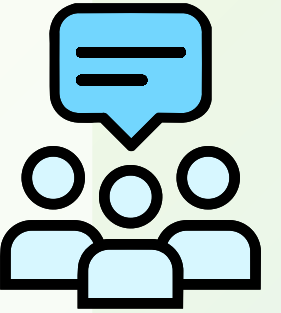
Final Thoughts

Mobile Order for Pickup continues to be a strong performer across both drive-thru and in-store settings. Guests are generally satisfied with the experience, noting that it offers a convenient and reliable way to place and receive orders. **The ability to customize orders, receive clear instructions, and enjoy a smooth pickup process all contribute to a positive overall impression.**

Speed is a major strength of this channel. Whether picking up through the drive-thru or heading inside, **guests benefit from faster service compared to traditional methods.** This efficiency plays a key role in boosting satisfaction and makes Mobile Order for Pickup a compelling option for time-sensitive customers.

That said, there are still areas where execution can improve. Some guests reported confusion around where to go upon arrival, citing unclear signage or a lack of dedicated pickup areas. In the drive-thru, communication at the speaker could be more consistent to ensure orders are accurate before fulfillment. These are relatively small fixes that can have a big impact on the experience.

Insights from the Field: *What shoppers had to say*



"My drink was properly crafted. The mobile app allowed me to customize my drink easily."

"The ordering process was easy and intuitive. The employee was able to verify my order, and it was delivered quickly. The employee was very friendly and welcoming."

Overall, Mobile Order for Pickup is delivering on its promise, but as more brands adopt this model, continued **focus on the handoff process and on-site clarity** will be essential to stay competitive and keep guests coming back.

Experience 3:

In-Store Kiosk Ordering



Experience 3: In-Store Kiosk Ordering

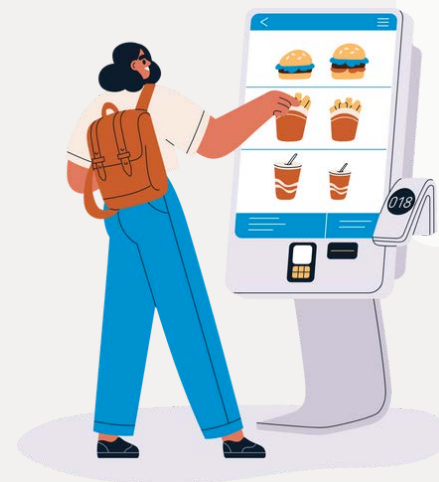
Kiosk ordering continues to offer guests a fast, intuitive, and customizable way to place their orders. And with 76% choosing kiosks when faced with long lines, it's clear they're seen as the faster option.

As more restaurants adopt this technology, delivering a seamless experience throughout the journey becomes critical. Clear signage and pickup instructions play a key role in guiding customers, especially those less familiar with the format. Unlike traditional ordering, kiosks require more intuitive design to support wayfinding and ease. When done well, they enhance both efficiency and overall satisfaction.

What we measured:

- **Innovation Experience:** Shoppers entered the store and placed their orders using a self-serve kiosk.
- **On-Premises:** Benchmark study numbers from the 2025 On-Premises Benchmark study where customers entered the store and placed their order at the counter with an employee.

Satisfaction with the order experience scored 2 percentage points higher for kiosk ordering compared to traditional methods, highlighting the positive impact of a well-designed self-service journey.



Key Findings

- **Pickup instructions were provided 83% of the time for kiosk orders**, ensuring customers received clear guidance in the experience.
- **Signage indicating the pickup location was present 84% of the time, reinforcing wayfinding and reducing uncertainty.** While these elements are used less in the legacy experience where customers are familiar with the process, they play a critical role in supporting guests as they navigate this newer ordering method.
- **Satisfaction with the pickup experience was 5 percentage points higher** when there was **clear signage indicating where to pick up the order.**

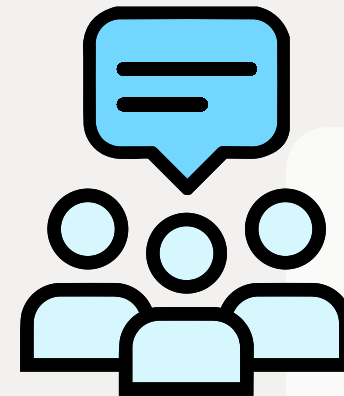
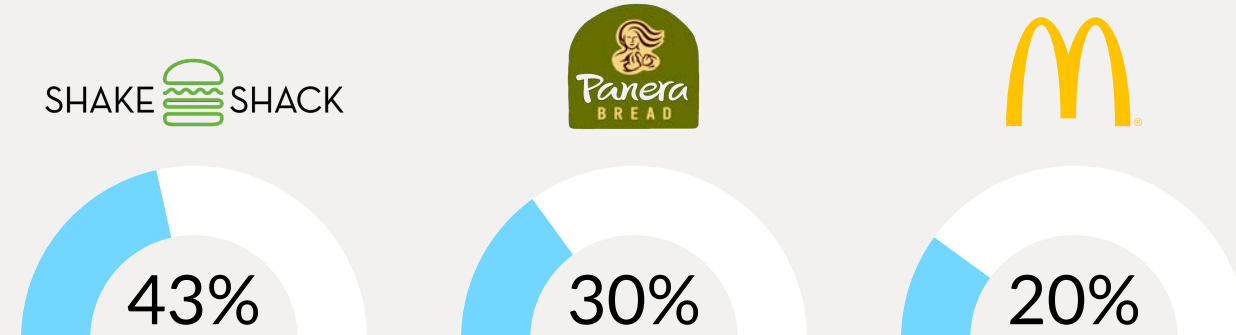
Kiosks Deliver Customization – But What About Friendliness?

The kiosk ordering experience received a 66% Friendliness score, lower than other ordering methods measured in this study and notably below the 78% benchmark from our On-Premises Study.

While kiosks offer customization and convenience, they limit face-to-face interaction, which is often where guests perceive warmth and friendliness. With fewer natural opportunities for staff to engage, the overall experience can feel impersonal **unless employees make a deliberate effort to connect with customers.**



Were you greeted or acknowledged upon entering the location?



Key Shopper Feedback:

"I could have been greeted when I arrived."

"I was not acknowledged or greeted when I arrived."

"The employee could have said hello, welcome, thank you."

Experience 3: In-Store Kiosk Ordering

	In-Store Kiosk Ordering	On-Premises Benchmark
Overall Satisfaction	89%	94%
Order Accuracy	94%	95%
Friendliness	66%	78%
Total Time	9 minutes and 11 seconds	7 minutes and 1 second
Service Time	8 minutes and 4 seconds	5 minutes and 33 seconds
Wait Time	31 seconds	1 minute and 31 seconds

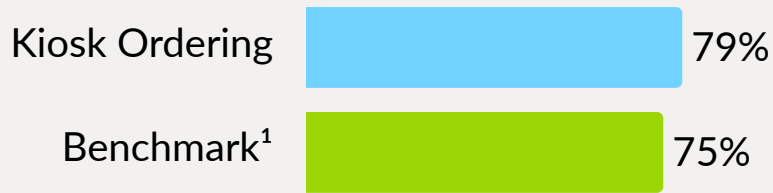
Satisfaction with Pickup Experience

Kiosk Ordering	93%
On-Premises Benchmark	96%

Satisfaction with Speed of Service

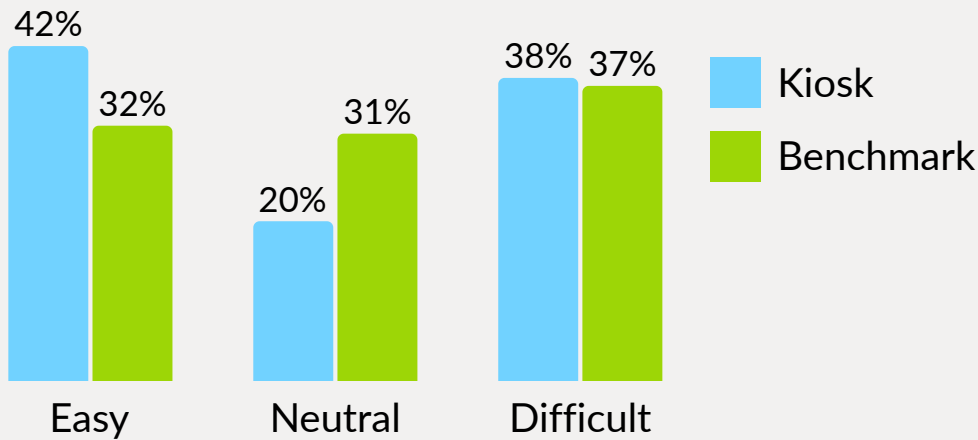
Kiosk Ordering	93%
On-Premises Benchmark	93%

Shopper was offered a suggestive sell

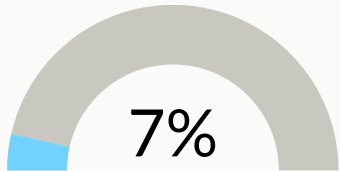


¹Benchmark data is from the Intouch Insight 2025 On-Premises Study

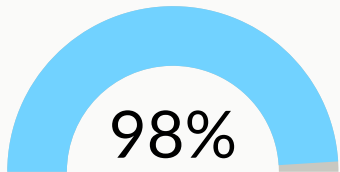
How Easy Is It to Take the Wrong Order?



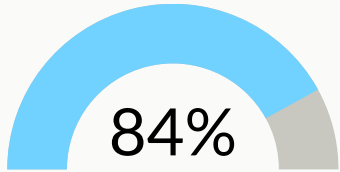
Glitches in Ordering Process

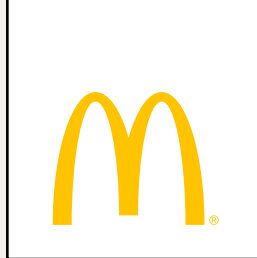


Ability to Customize Order



Signage Indicating Pickup Area





In the Spotlight: McDonald's

McDonald's has been a leader in adopting self-ordering kiosks, rolling out over 130,000 units worldwide since 2015—more than any other brand. This large-scale implementation has improved ordering efficiency, enhanced personalization, and contributed to an 11% increase in sales, exceeding early projections.

	McDonald's	Benchmark ¹
Friendliness	50%	78%
Total Time	8 minutes and 17 seconds	7 minutes and 1 second

¹Benchmark data is from the Intouch Insight 2025 On-Premises Study

Brand Performance Highlights

McDonald's stood out for its **clarity around order pickup**, offering better instructions, clearer signage, and more defined pickup areas than competitors.

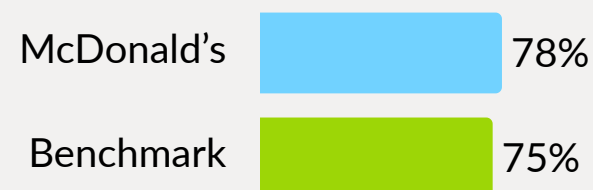
Pickup instructions: 83% (vs. 42%*)

Signage for pickup areas: 90% (vs. 49%*)

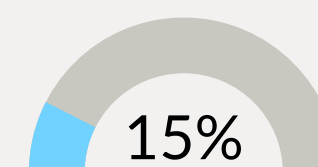
Designated pickup areas: 95% (vs. 76%*)

*Average from the 2025 Intouch Insight On-Premises Study.

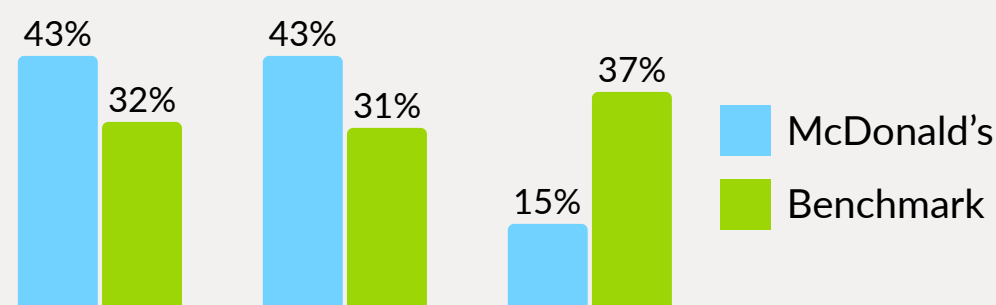
Shopper was offered a suggestive sell



Glitches in Ordering Process



How Easy Is It to Take the Wrong Order?



Satisfaction with Order Experience

McDonald's	95%
Benchmark	95%

Satisfaction with Pickup Experience

McDonald's	88%
Benchmark	96%

Satisfaction with Speed of Service

McDonald's	83%
Benchmark	93%



In the Spotlight: Shake Shack

Shake Shack's kiosks have become its largest ordering channel, now offering improved customization and integrated upselling tools. These enhancements align with the brand's focus on streamlining operations, cutting wait times, and strengthening financial performance. Investments continue in both the guest interface and team member experience as kiosks play a bigger role in the in-store journey.

	Shake Shack	Benchmark ¹
Friendliness	83%	78%
Total Time	8 minutes and 59 seconds	7 minutes and 1 second

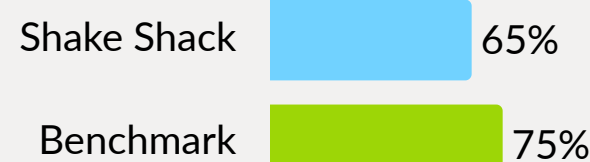
¹Benchmark data is from the Intouch Insight 2025 On-Premises Study

Brand Performance Highlights

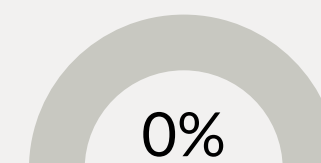
Food temperature, food quality, and overall satisfaction all scored a perfect 100%.

Friendliness was rated 5 percentage points higher than the On-Premises benchmark.

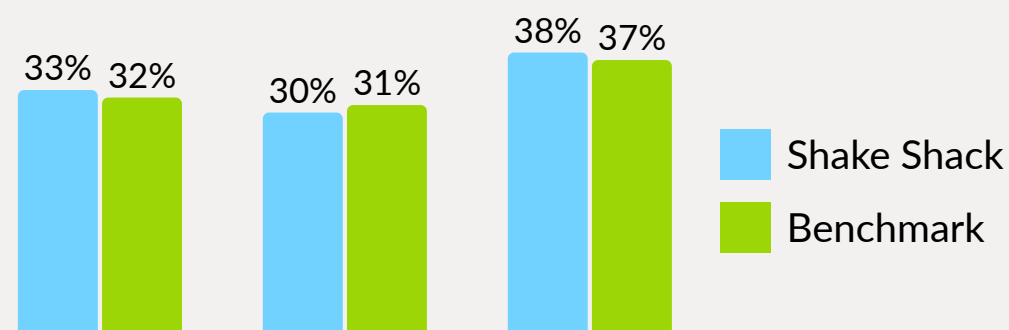
Shopper was offered a suggestive sell



Glitches in Ordering Process



How Easy Is It to Take the Wrong Order?



Satisfaction with Order Experience

Shake Shack	100%
Benchmark	95%

Satisfaction with Pickup Experience

Shake Shack	100%
Benchmark	96%

Satisfaction with Speed of Service

Shake Shack	100%
Benchmark	93%



In the Spotlight: Panera

Panera has been a leader in kiosk technology since launching “Panera 2.0” in 2014 to enhance the self-service experience. By 2022, kiosks had boosted sales by 11.5% over two years while reducing wait times and operational costs. The brand’s continued investment underscores the value of kiosks in improving both customer satisfaction and overall profitability.

	Panera	Benchmark ¹
Friendliness	65%	78%
Total Time	10 minutes and 16 seconds	7 minutes and 1 second

¹Benchmark data is from the Intouch Insight 2025 On-Premises Study

Brand Performance Highlights

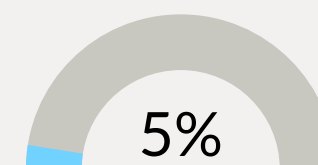
When compared to other kiosks, Panera performs **well in terms of providing customers with easy-to-follow food pickup processes**

They led in **pickup instructions (90%)**, **signage (93%)**, and **designated pickup area (98%)**.

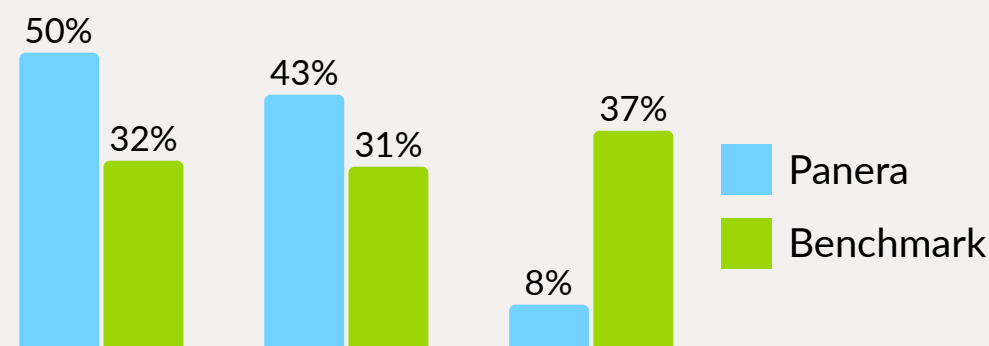
Shopper was offered a suggestive sell



Glitches in Ordering Process



How Easy Is It to Take the Wrong Order?



Satisfaction with Order Experience

Panera	95%
Benchmark	95%

Satisfaction with Pickup Experience

Panera	93%
Benchmark	96%

Satisfaction with Speed of Service

Panera	95%
Benchmark	93%

Experience 3: In-Store Kiosk Ordering

Final Thoughts

Kiosks are clearly delivering on their promise of ease and customization, especially in busy environments where long lines would otherwise slow down service. Shoppers frequently described the ordering process as intuitive and appreciated the cleanliness of the environment and the quality of the food they received. Across brands, well-placed signage and clear pickup instructions were critical to success, helping guests navigate the experience confidently and efficiently.

But while the functional aspects of kiosk ordering are largely successful, one key piece is still missing: the human element. Shoppers consistently mentioned the lack of greetings, eye contact, or acknowledgment from staff. Without these simple gestures, the experience often felt impersonal, no matter how seamless the technology.

Additionally, several customers noted **confusion around receipt handling, pointing to a need for clearer kiosk messaging and staff support** at critical points in the journey.



Insights from the Field: *What shoppers had to say*



"It was super easy and fast to order on the kiosk. The food was delivered quickly and tasted so fresh and good! I was very satisfied with my visit."

"I liked that you could click on items from the menu, view their ingredients, and customize them easily."

Ultimately, the brands that will lead in self-service aren't just the ones investing in technology, but the ones **designing around the human experience**. When kiosks are paired with proactive hospitality and thoughtful design, they don't just speed up the process, they elevate it.

Where Do Brands Go From Here?

Adoption of new technologies is no longer optional in the quick service industry. They are the new standard. But as our 2025 Emerging Experiences Study shows, success isn't just about adding tech to the customer journey. It's about **executing with precision, consistency, and a strong focus on the customer experience.**

Across drive-thru, mobile, and in-store environments, we see clear opportunities for operators to refine their strategies and deliver better results.



Recommendations for Operators

1. Focus on Execution, Not Just Adoption

Technology needs to be simple and seamless for the guest. Whether it's ordering through AI or picking up a mobile order, clear instructions, reliable performance, and intuitive design matter most.

2. Keep the Human Touch

Automation doesn't replace hospitality. A friendly tone, a warm greeting, or a helpful handoff can turn a good experience into a great one.

3. Watch the Details

Small issues like order errors, unclear signage, or tech glitches can lead to frustration. Monitoring and fixing these quickly is key to keeping satisfaction high.

Final Thought

As technology continues to reshape the industry, the brands that win will be the ones that get the **details right and never lose sight of the customer.**



About Intouch Insight

Intouch Insight is a CX solutions and mystery shopping company specializing in helping multi-location brands achieve operational excellence, exceed customer expectations, and build long-term customer loyalty. We are proud to deliver growth solutions to over 300 of the world's most beloved brands.

Our solutions are designed to streamline operations, maintain brand standards, and provide actionable insights to help our clients enhance their CX. With over 40 years of CX expertise, we excel in providing our clients with top-notch CX, customer surveys, mobile forms, mystery shopping, as well as operational and compliance audit solutions.

Offices

Ottawa

400 March Road
Ottawa, ON, Canada
K2K 3H4

Toledo

1690 Woodlands Dr #103
Maumee, OH
43537

Atlanta

4555 Mansell Road, Suite 300
Alpharetta, GA
30022

www.intouchinsight.com

letschat@intouchinsight.com

1 800-263-2980

