

22<sup>nd</sup> Annual

# Drive-Thru Study



In partnership with: **QSR**



# 2022 Annual Drive-Thru Study Table of Contents

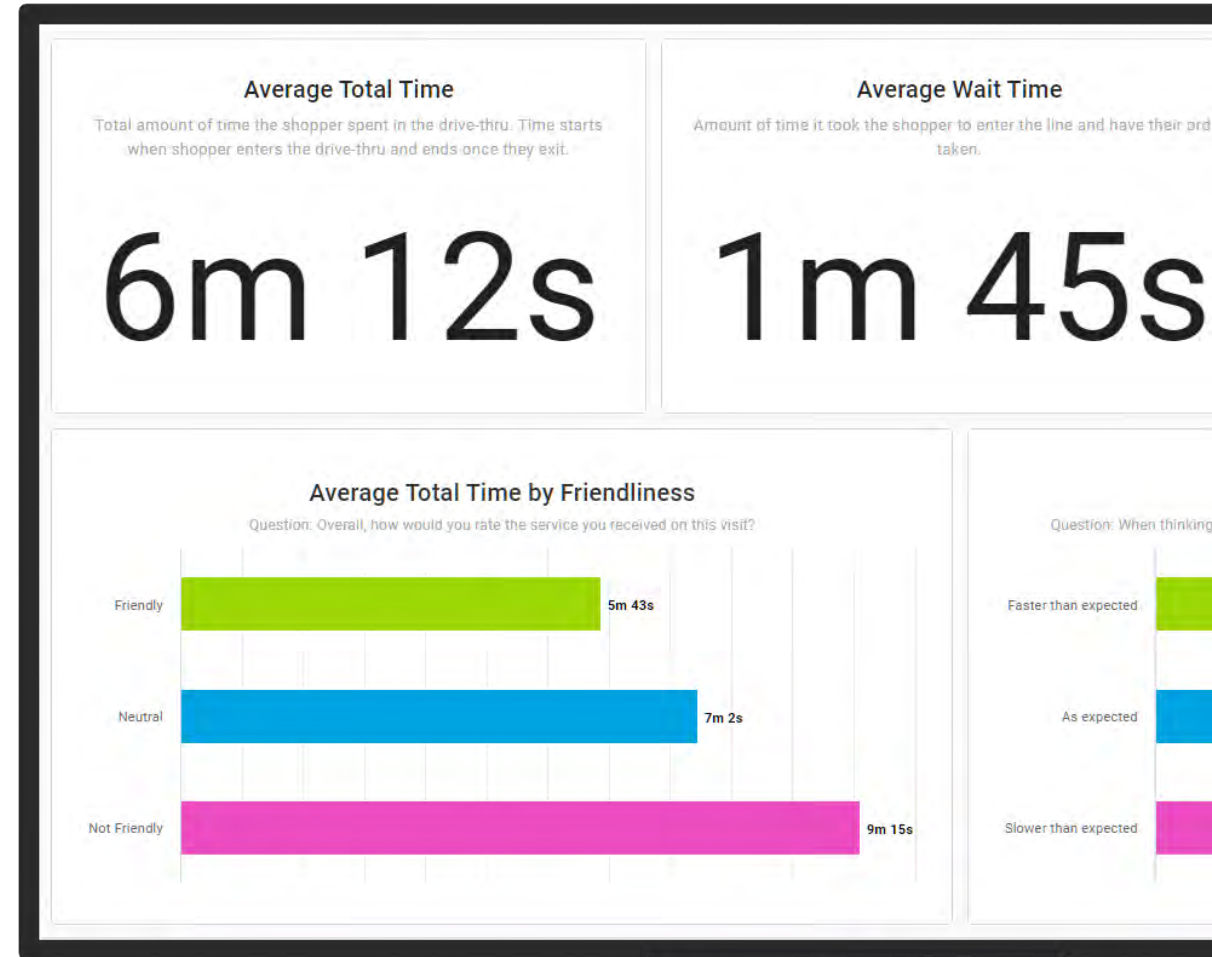
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# Purchase Access to the Complete Reporting Package

- 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 for more information: [letschat@intouchinsight.com](mailto:letschat@intouchinsight.com)



# The Extras



Complete Research  
Package price: \$4995

In addition to the data points included in this report, by purchasing access to the [Complete Reporting Package](#) you get:

- Breakdown by region and dayparts
- Media gallery with Menu Board photos
- Time breakdowns by weather, form of payment, number of vehicles & lanes
- Top areas for improvement for YOUR brand\*
- Details on most frequently incorrect items
- Additional insights (e.g. curb appeal, ease of entering drive-thru)
- Ability to drill into individual brand performance
- Correlations between time and friendliness, satisfaction and accuracy

*\*only applies to brands included in the study.*

>> [Contact us for more information: letschat@intouchinsight.com](mailto:letschat@intouchinsight.com)

# Methodology



# Methodology

For 22 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.



2011

SeeLevel HX takes over Study with acquisition of Insula Research

2022

Intouch Insight takes over Study with acquisition of SeeLevel HX

# Methodology



## # Shops Performed by Brand

1. Arby's	174	6. Hardee's	89
2. Burger King	168	7. KFC	167
3. Carl's Jr.	87	8. McDonald's	165
4. Chick-fil-A	174	9. Taco Bell	173
5. Dunkin'	170	10. Wendy's	170

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

9%

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

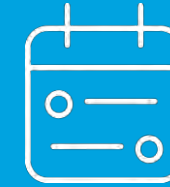
49%

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

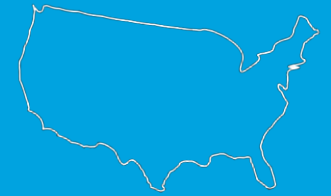
12%

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

29%



June 2022 -  
July 2022



Geographically  
Distributed



1537 Drive-Thru  
Shops Completed

# Speed of Service



# Category Definitions

## **Wait time:**

Amount of time it took the shopper to enter the line and have their order taken.

## **Service time:**

Amount of time it took the shopper to order and receive their food.

## **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.

## **Average total time by cars:**

Calculated by dividing total time by average cars in line.

## **Number of cars in line:**

Number of vehicles in line for service (in front of shopper to the speaker) across all stations and lanes as the shopper entered the drive-thru line.

## **Order Confirmation Board (OCB):**

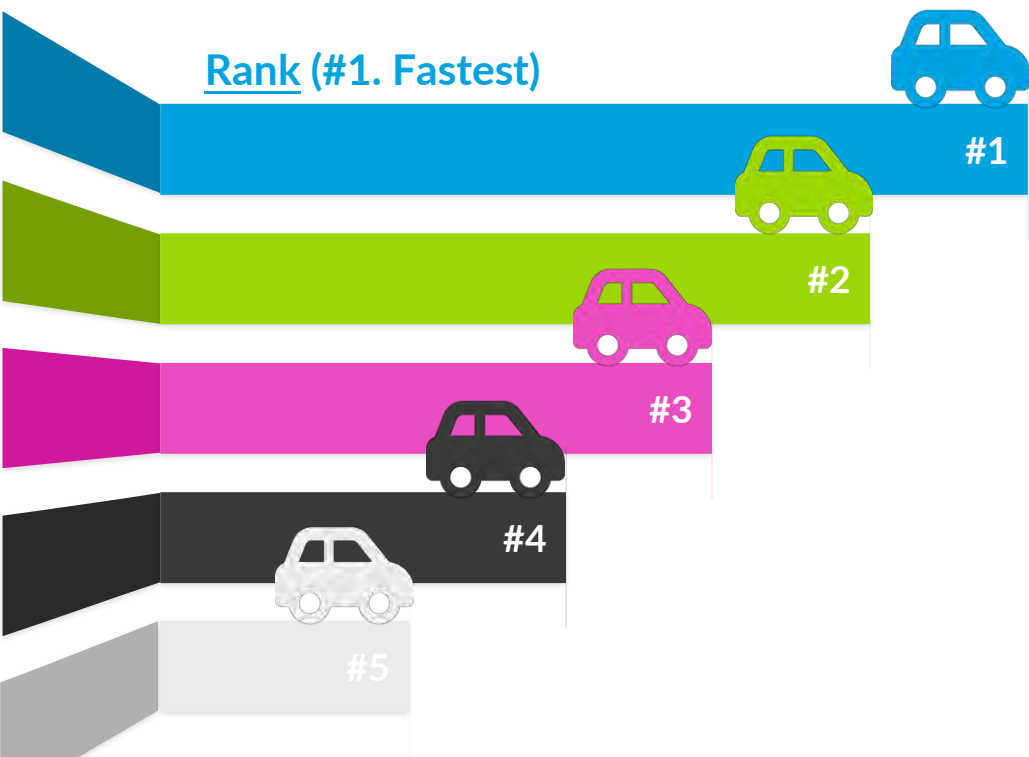
Order confirmation board that displays the customer's order during the order taking process. Typically located around, or incorporated into, the menu board.

## **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.

# Category Leaders: Fastest Total Time

Rank (#1. Fastest)

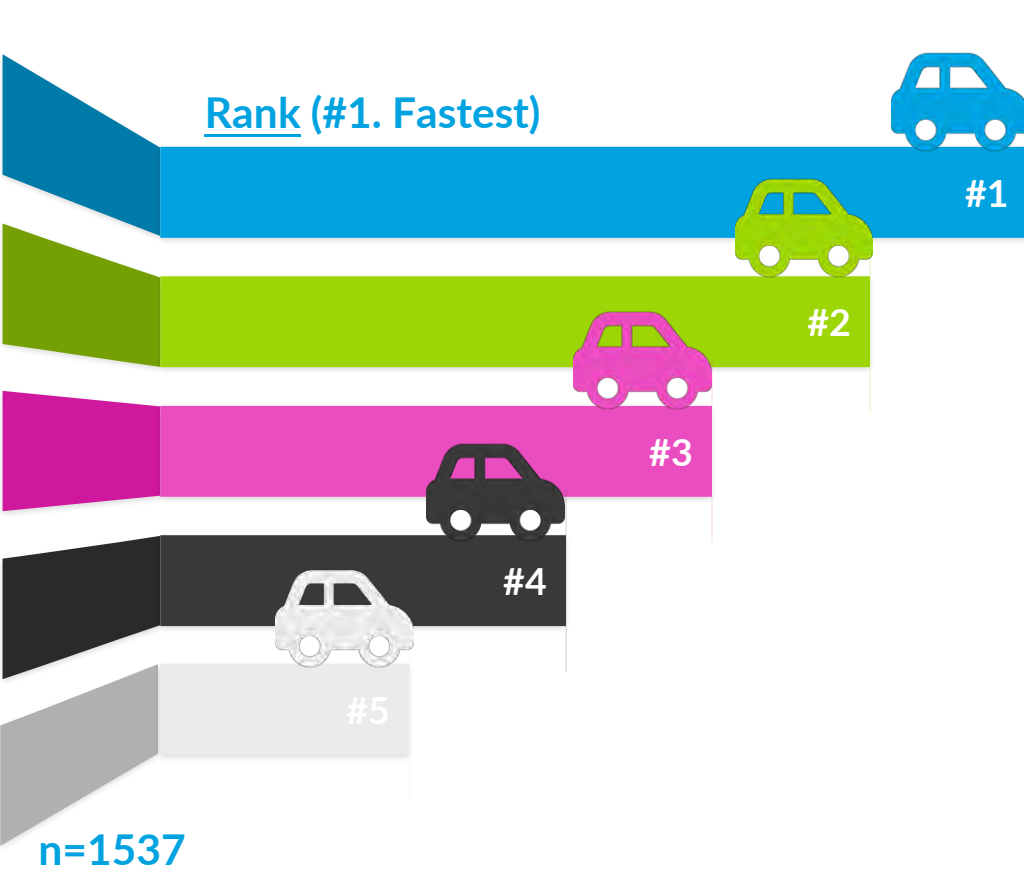


n=1537

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

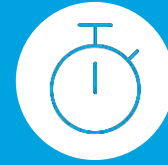
	<u>2022</u>	<u>2021</u>	<u>2020</u>
	 KFC	 Chick-fil-A	 Chick-fil-A
	 Taco Bell	 McDonald's	 McDonald's
	 Hardee's	 Wendy's	 Wendy's
	 Dunkin'	 Dunkin'	 Arby's
	 Carl's Jr.	 Taco Bell	 Taco Bell

# Category Leaders: Fastest Total Time by Car



Total time is the total amount of time the shopper spent in the drive-thru. Time starts when shopper enters the drive-thru and ends once they exit. All times were divided by the average amount of cars in line per brand in order to provide accurate and comparable results.

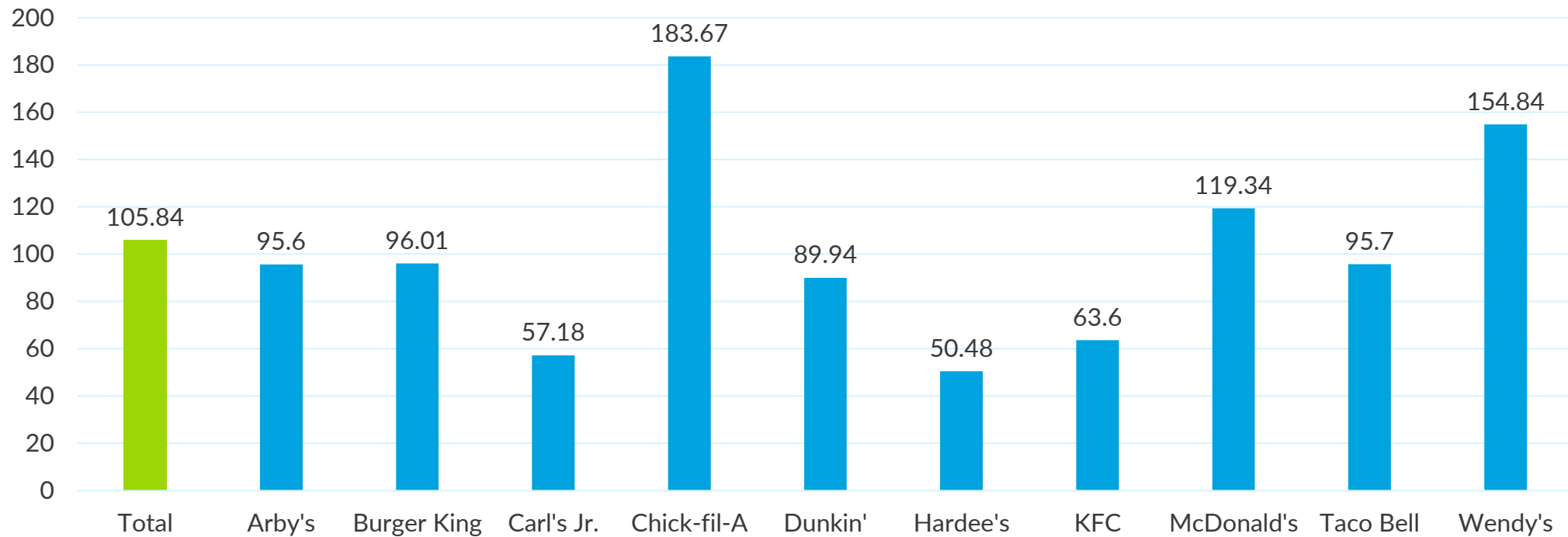
2022	2021	2020
Chick-fil-A	Chick-fil-A	Chick-fil-A
McDonald's	McDonald's	McDonald's
Taco Bell	Wendy's	Wendy's
<u>Tied for 4th</u>		
Dunkin'	Dunkin'	Arby's
Arby's	Taco Bell	Taco Bell

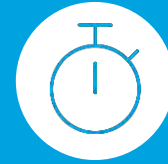


Hardee's had the quickest average wait time.

# Average Wait Time

Average Wait Time (in seconds) by Brand

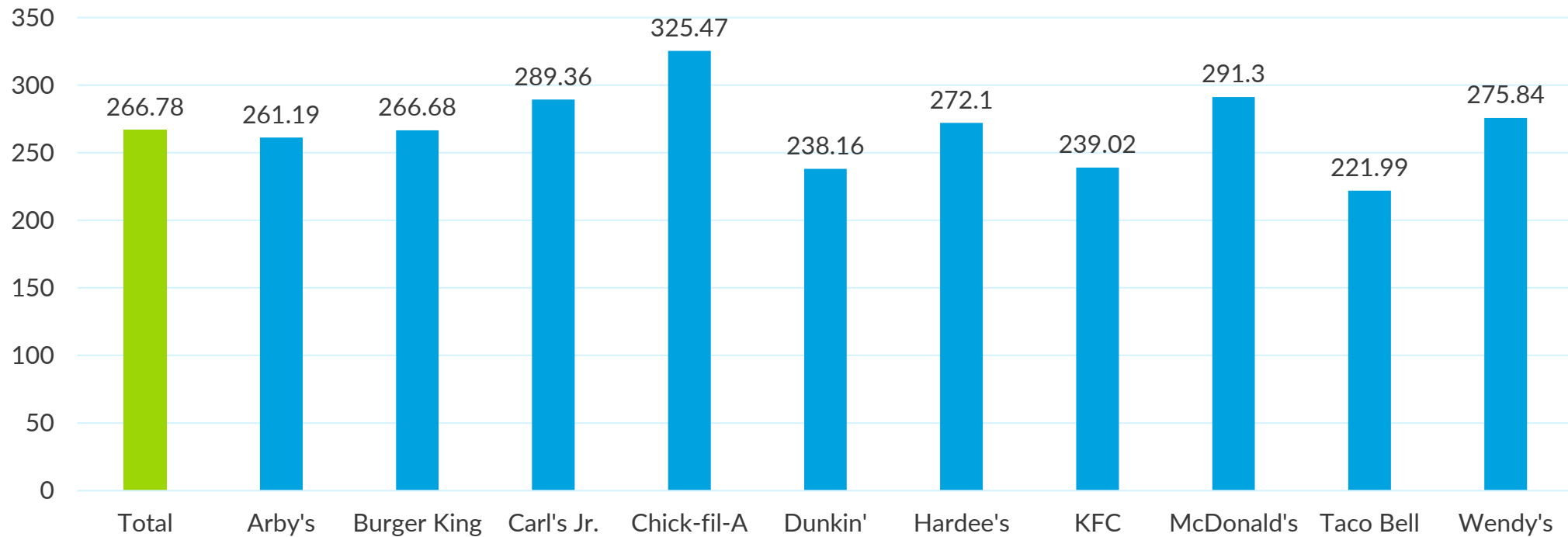


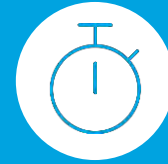


Taco Bell had the quickest average service time.

# Average Service Time

Average Service Time (in seconds) by Brand

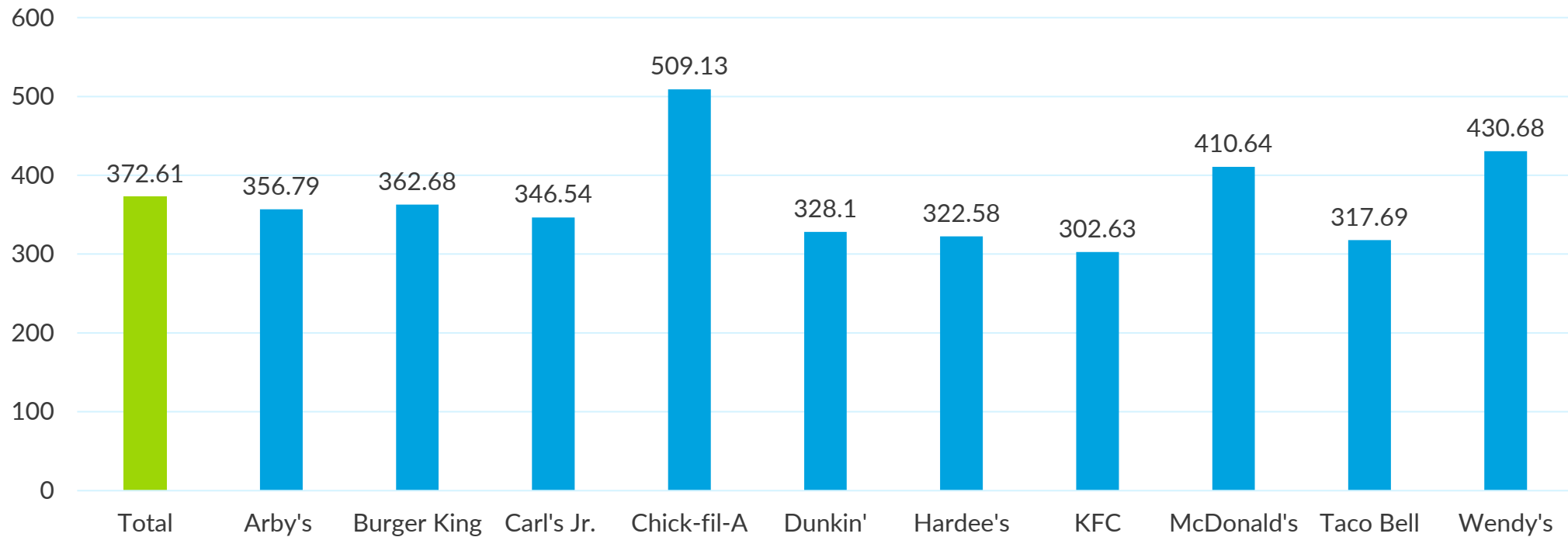




KFC had the quickest  
average total time.

# Average Total Time

Average Total Time (in seconds) by Brand

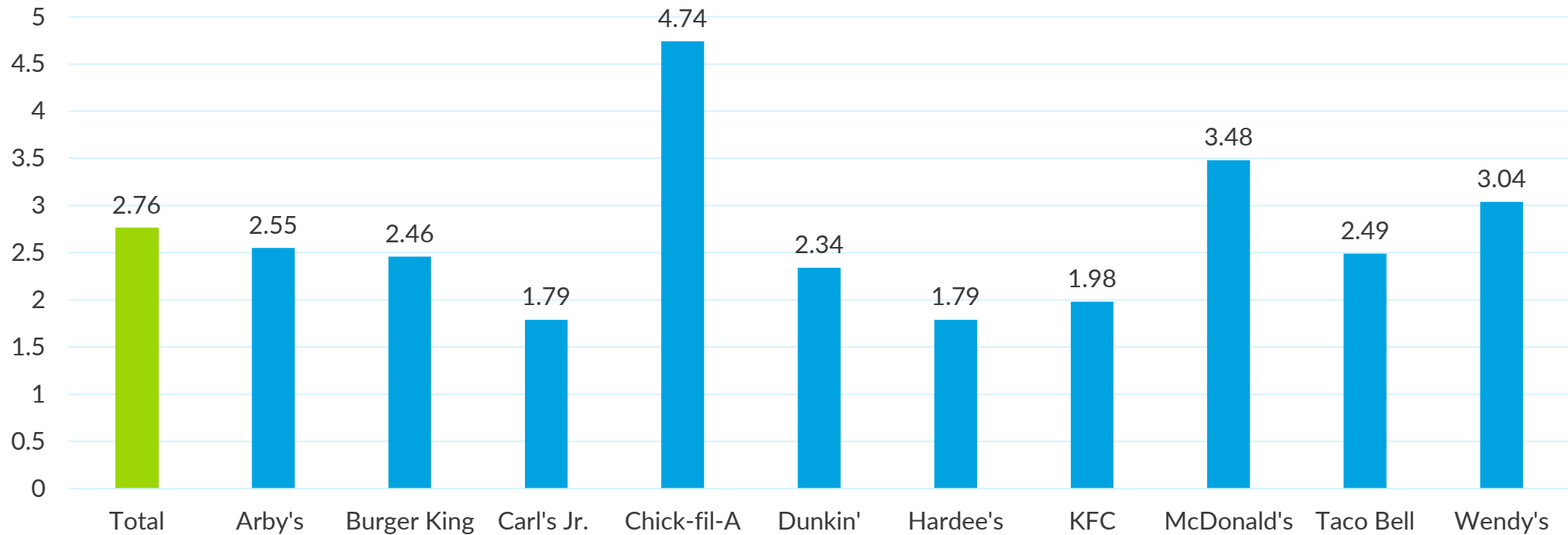




Chick-fil-A had the most average cars in line.

# Average Cars in Line

Average Cars in Line by Brand

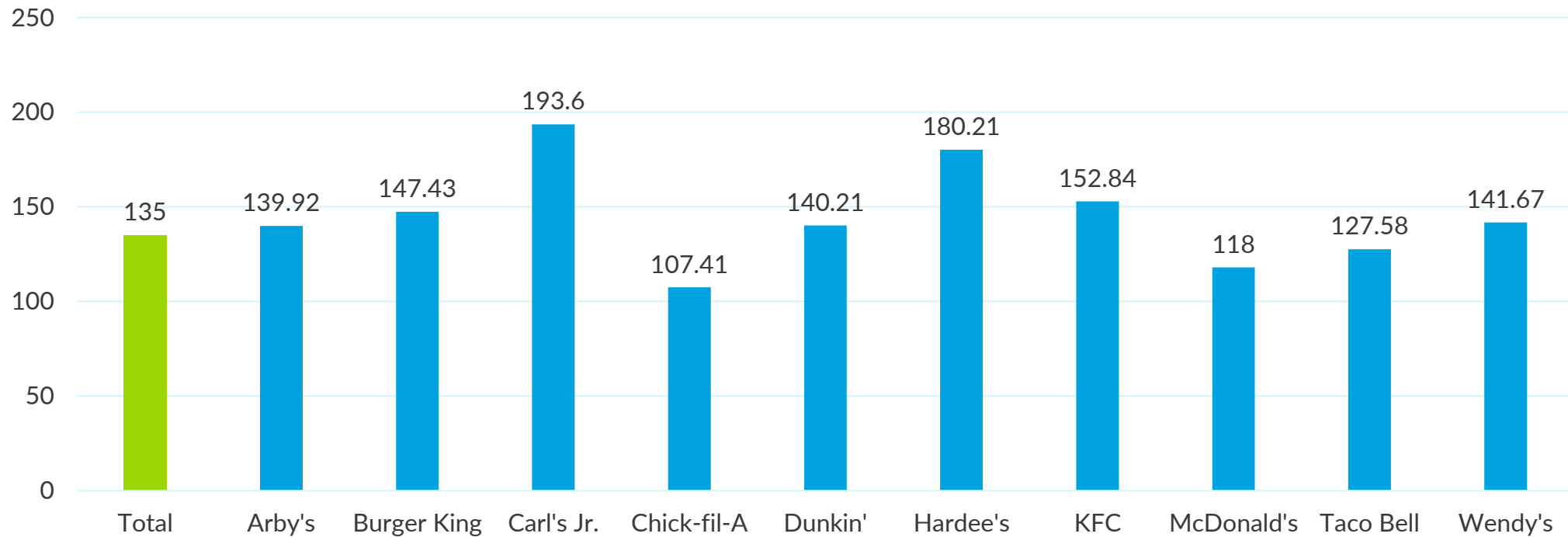


# Average Total Time by Cars in Line

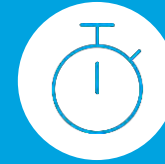
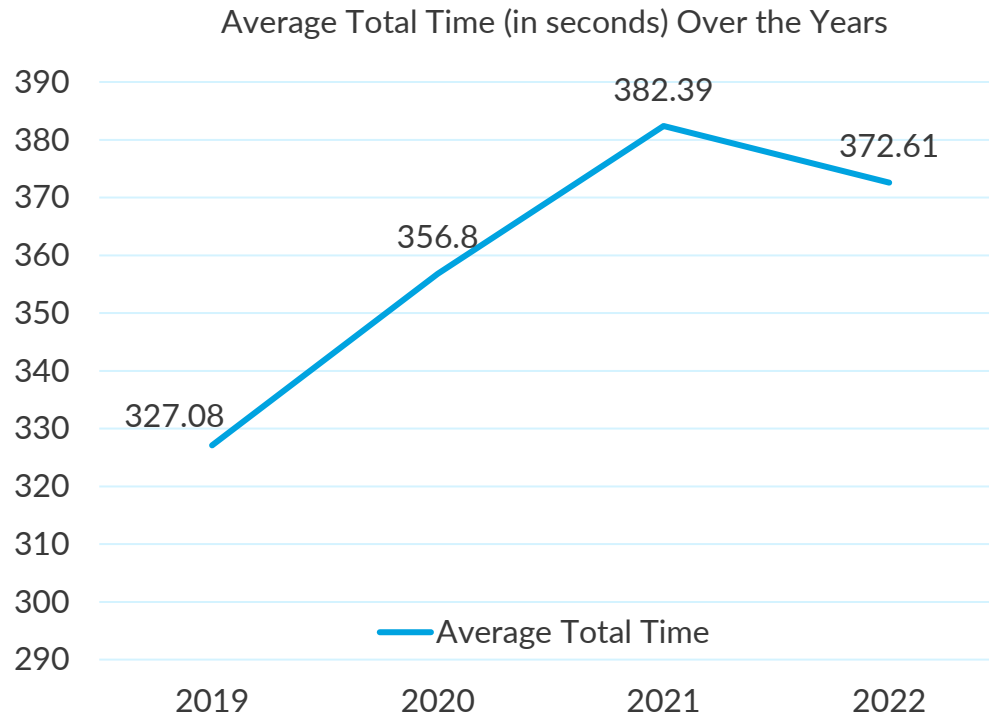


Chick-fil-A had the  
quickest average total  
time by cars in line.

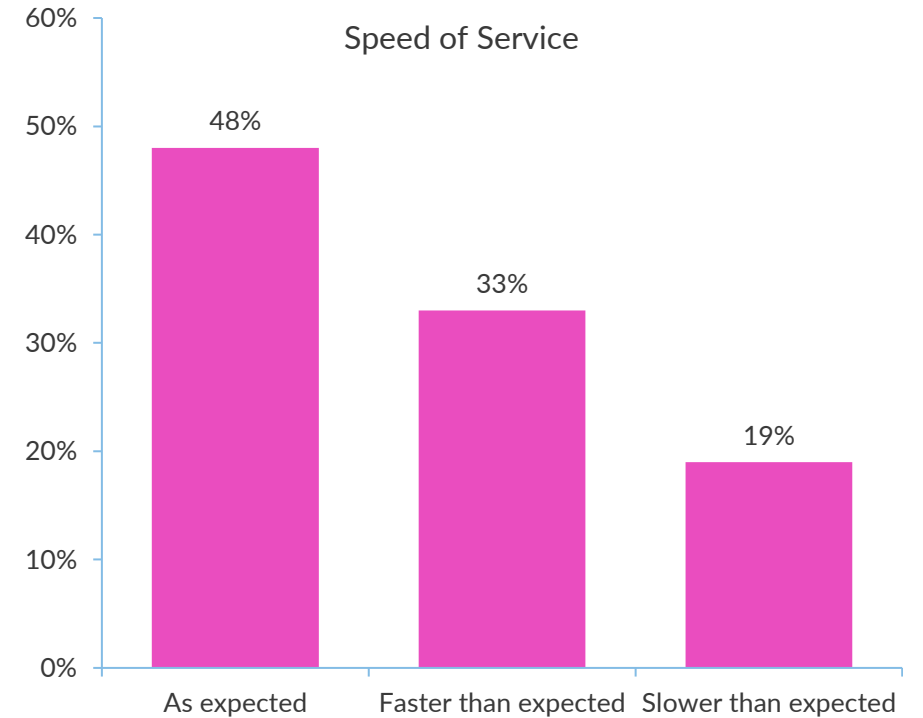
Average Total Time (in seconds) by Cars in Line



# Speed of Service



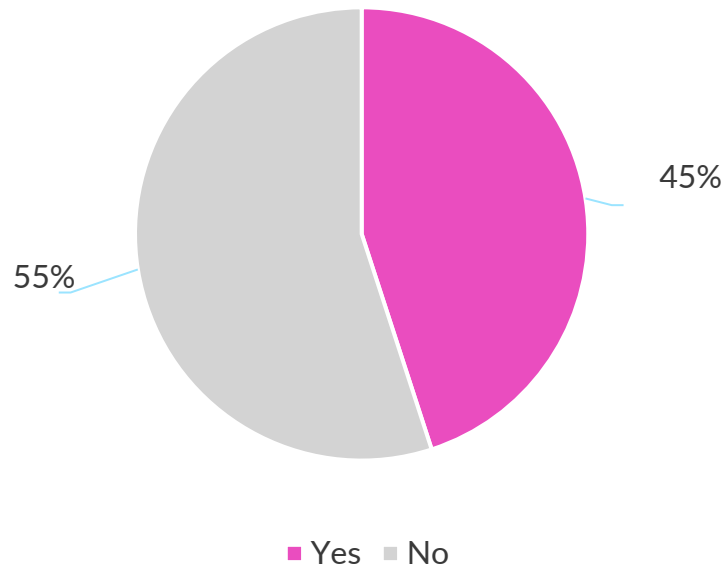
Although average total time was 9.78 seconds faster than 2021, 1 out of 5 people report that their order was received slower than expected.



*When thinking about the "speed" that your order was delivered, please rate your experience.*

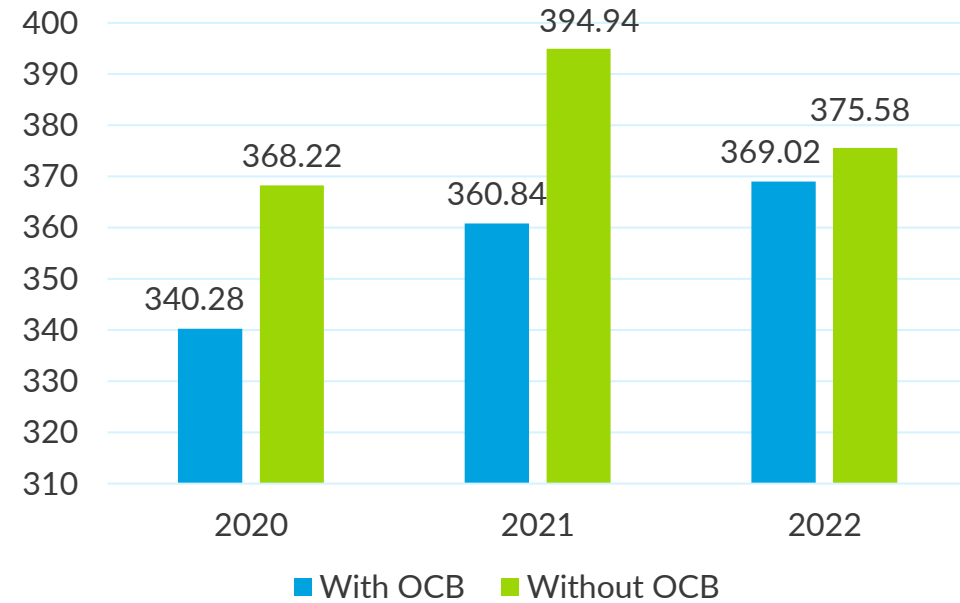
# Speed of Service with OCB

Order Confirmation Board in Place (2022)




Restaurants with OCBs delivered 6.56 seconds faster on Total Avg. Time in 2022, compared to 34 seconds faster in 2021 and 28 seconds faster in 2020.

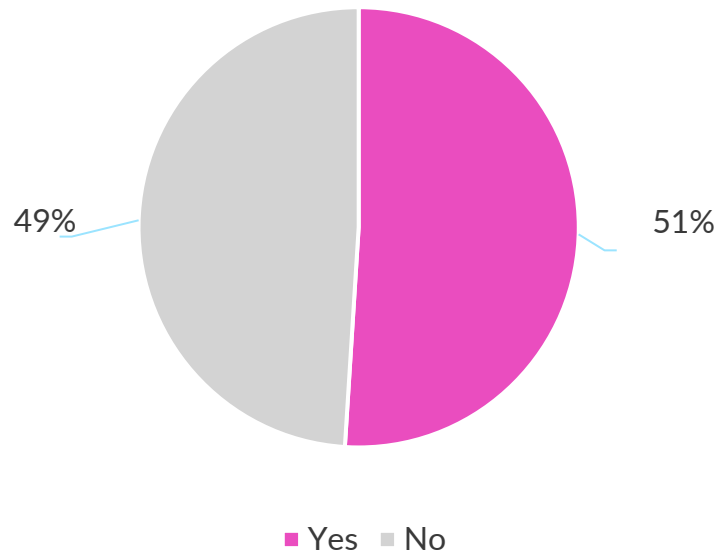
Average Total Time (in seconds)



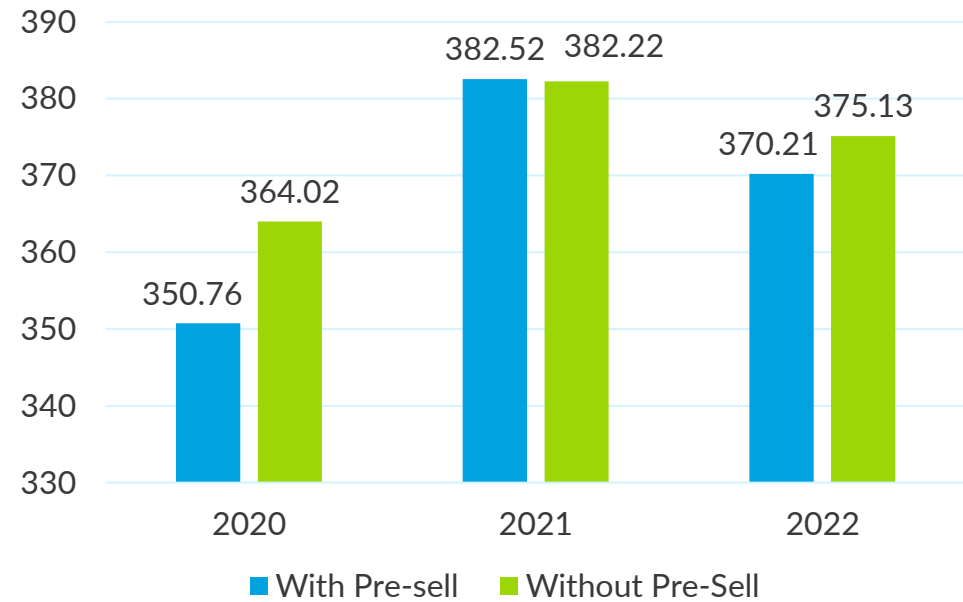
# Speed of Service with Pre-Sell Menu Board

 Total time is on average 4.92 seconds faster when a pre-sell menu board is in place.

Pre-Sell Menu Board in use



Average Total Time (in seconds)



# Accuracy

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# Category Definitions

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## Order Accuracy:

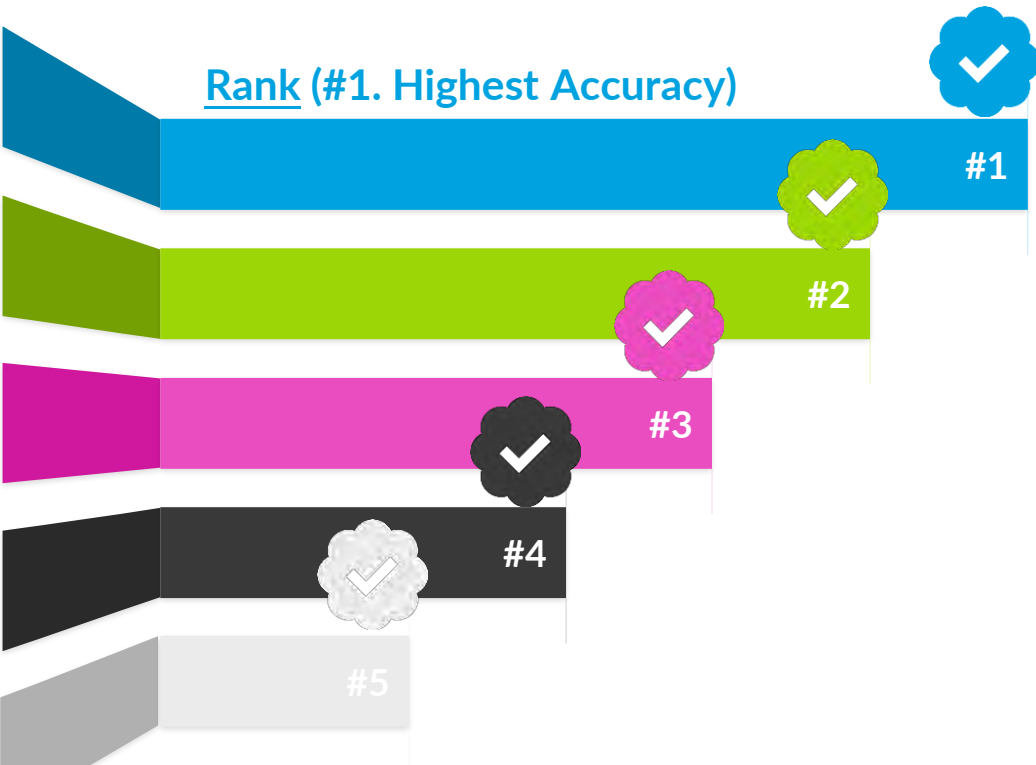
Shoppers were asked a yes or no question whether their order was filled correctly and completely, including special requests.

## 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.

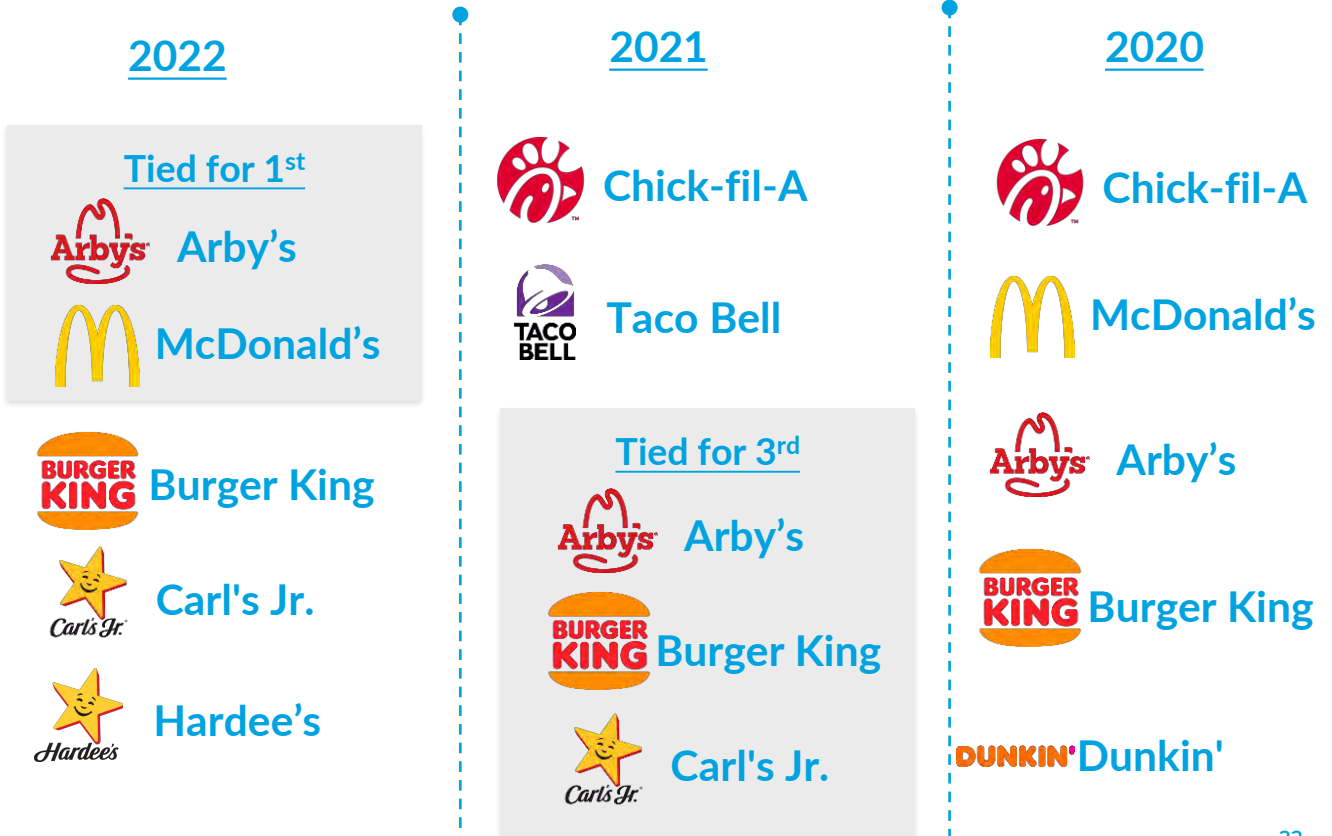
# Category Leaders: Order Accuracy

Rank (#1. Highest Accuracy)



n=1537

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

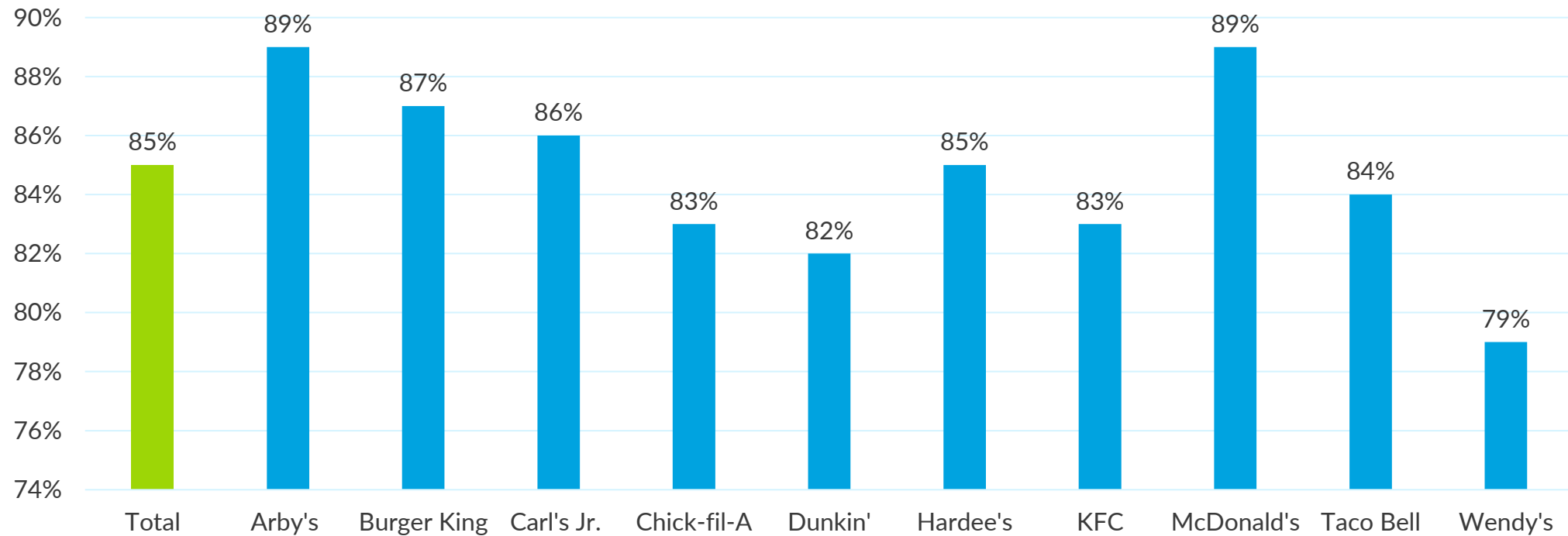




Arby's and McDonald's had the highest order accuracy.

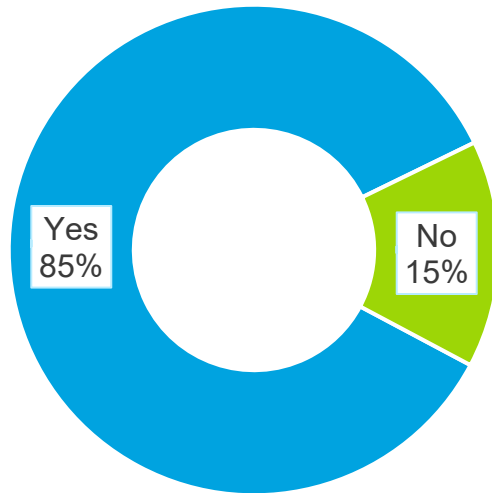
# Accuracy by Brand

Order Accuracy by Brand

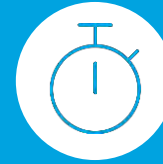


# Inaccurate Orders

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

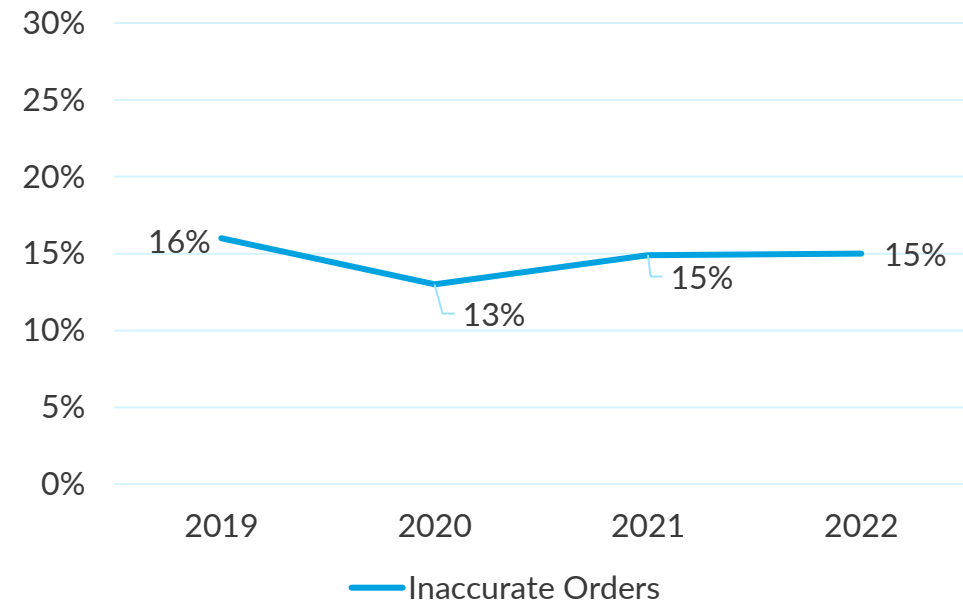


n=1537



In 2022, accurate orders are 49 seconds faster than orders filled incorrectly.

Inaccurate Orders



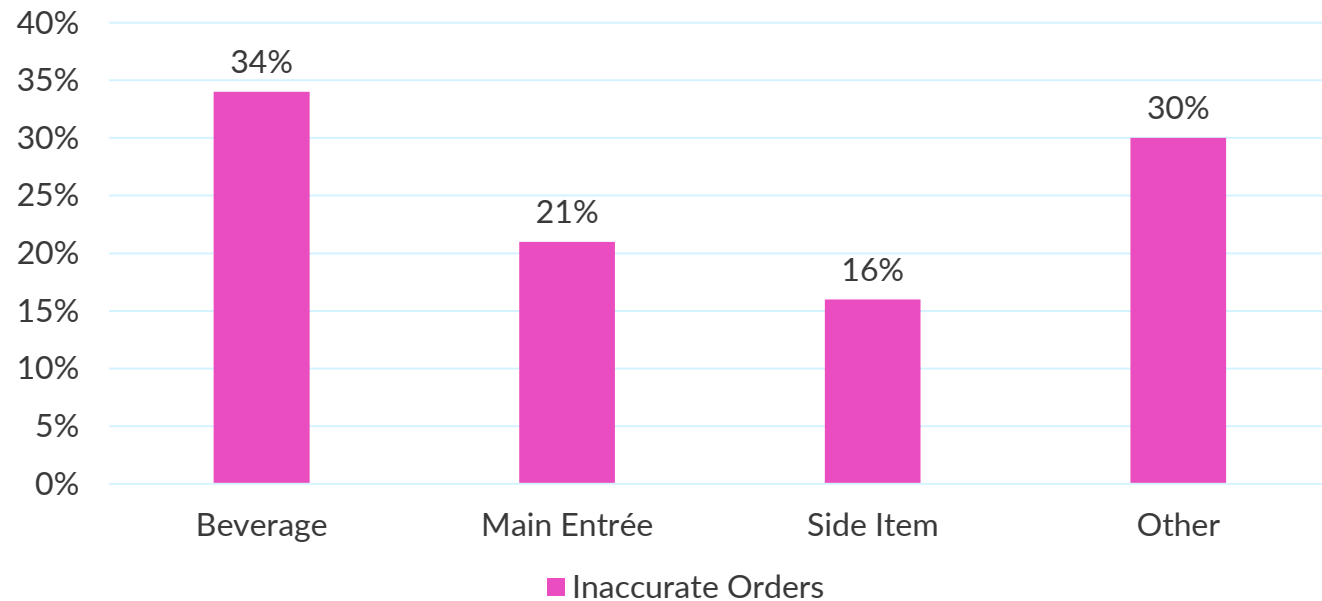
# Inaccuracies

Of the 15% of inaccurate orders, there was a range in the reported issues.



34% of inaccurate orders were incorrect beverage.

Inaccurate Orders

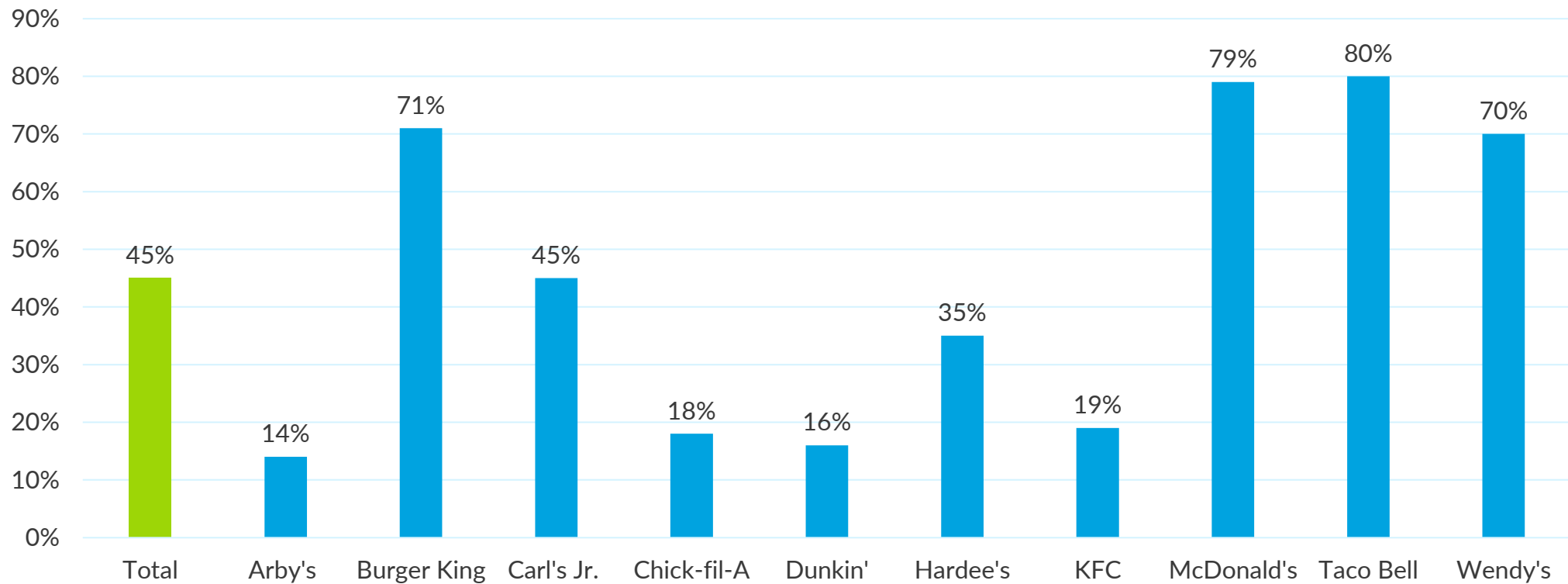




Accuracy is 2% higher with OCB, and 7.5% higher when a shopper is asked to confirm if OCB is correct.

# Use of OCB by Brands

OCB in Place



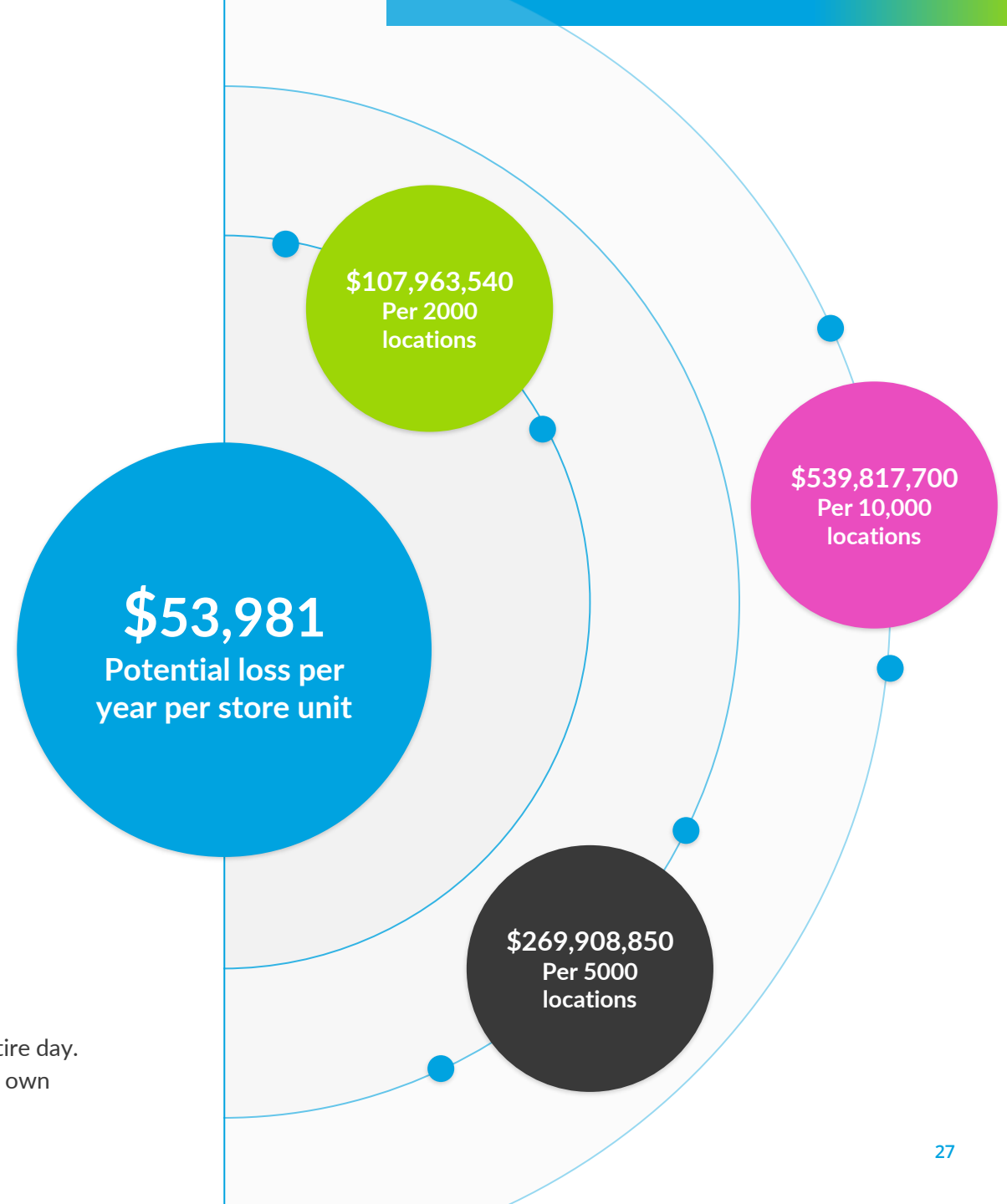
# The Bottom Line

## Inaccuracy costs you

Based on an average meal cost of \$9.02, and a difference of 49 seconds between accurate and inaccurate orders, annual losses due to inaccurate orders adds up.

**What is your brand doing to improve order accuracy and eliminate these unnecessary costs?**

\*\*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.



# Suggestive Selling



# Category Definitions

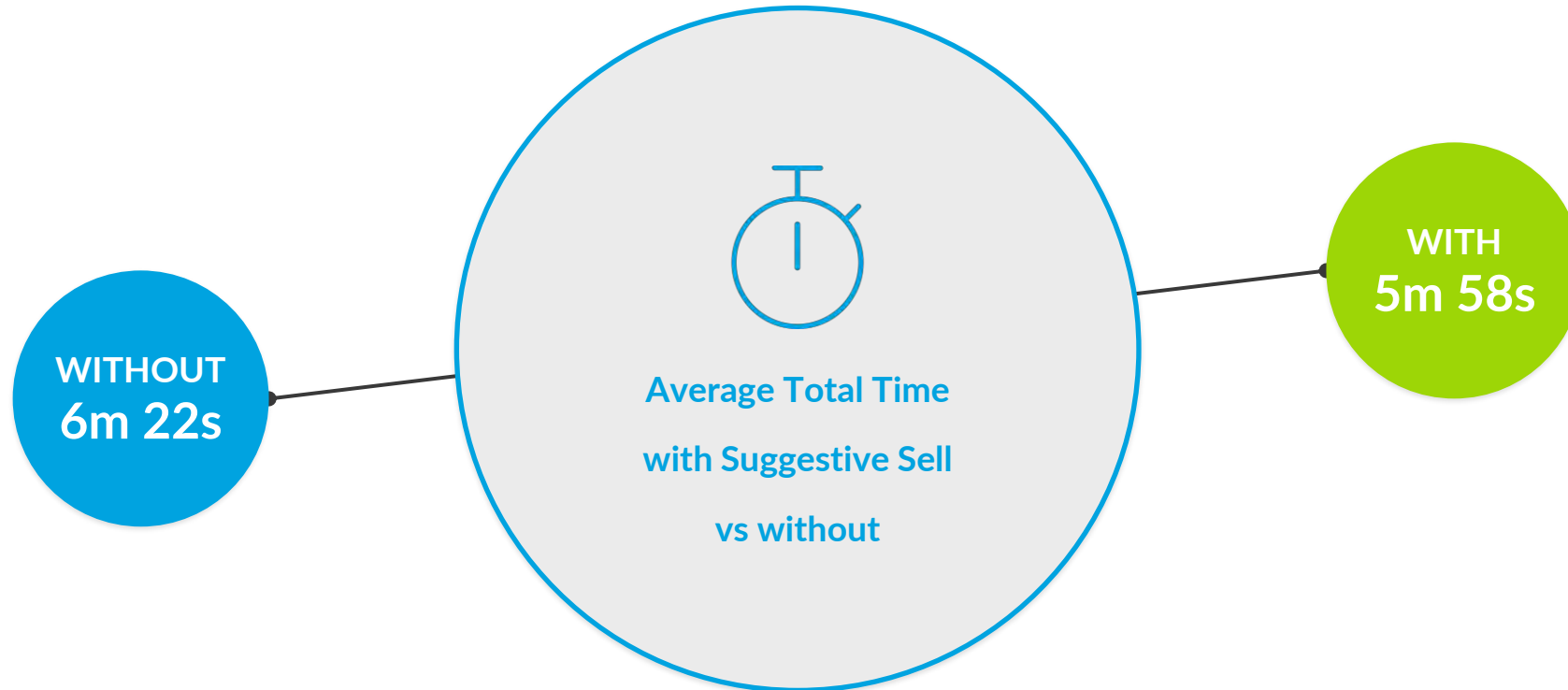
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## Suggestive Selling:

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?*

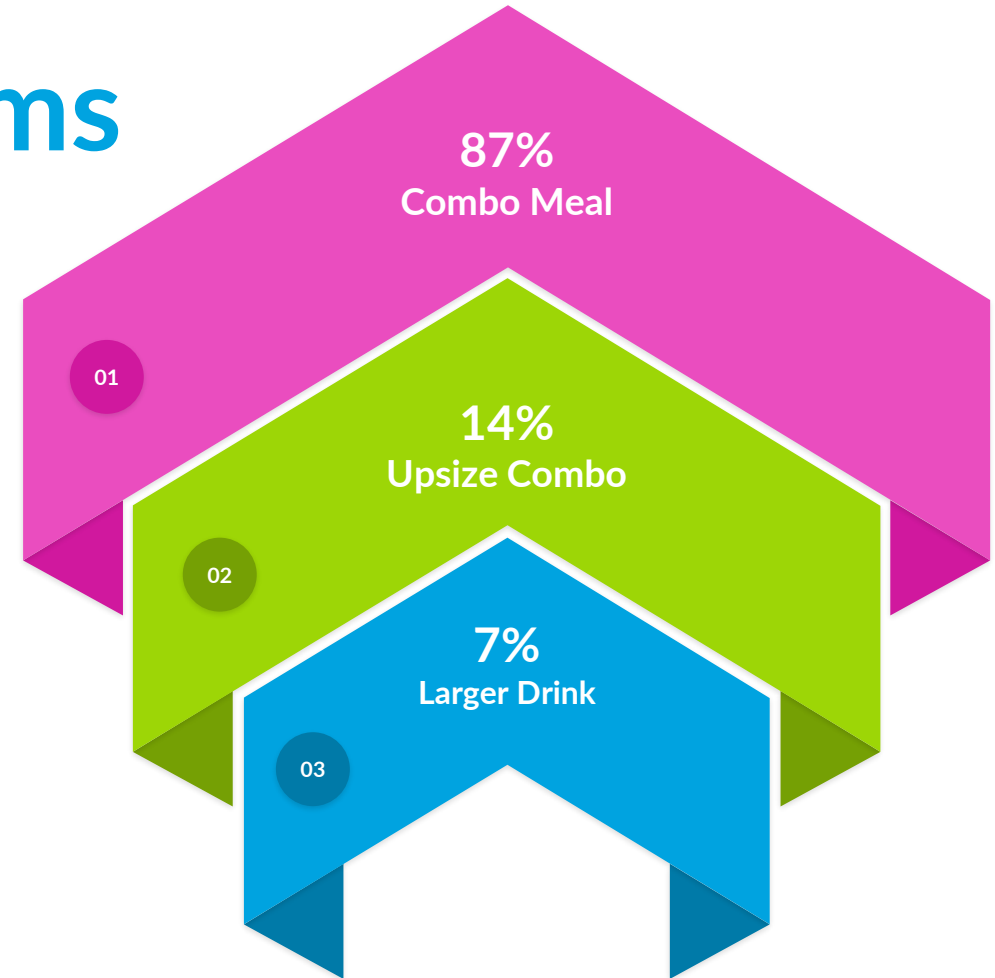
# Time Impact of Suggestive Selling



# Top 3 Suggested Items



42% of shoppers were offered a suggestive sell.

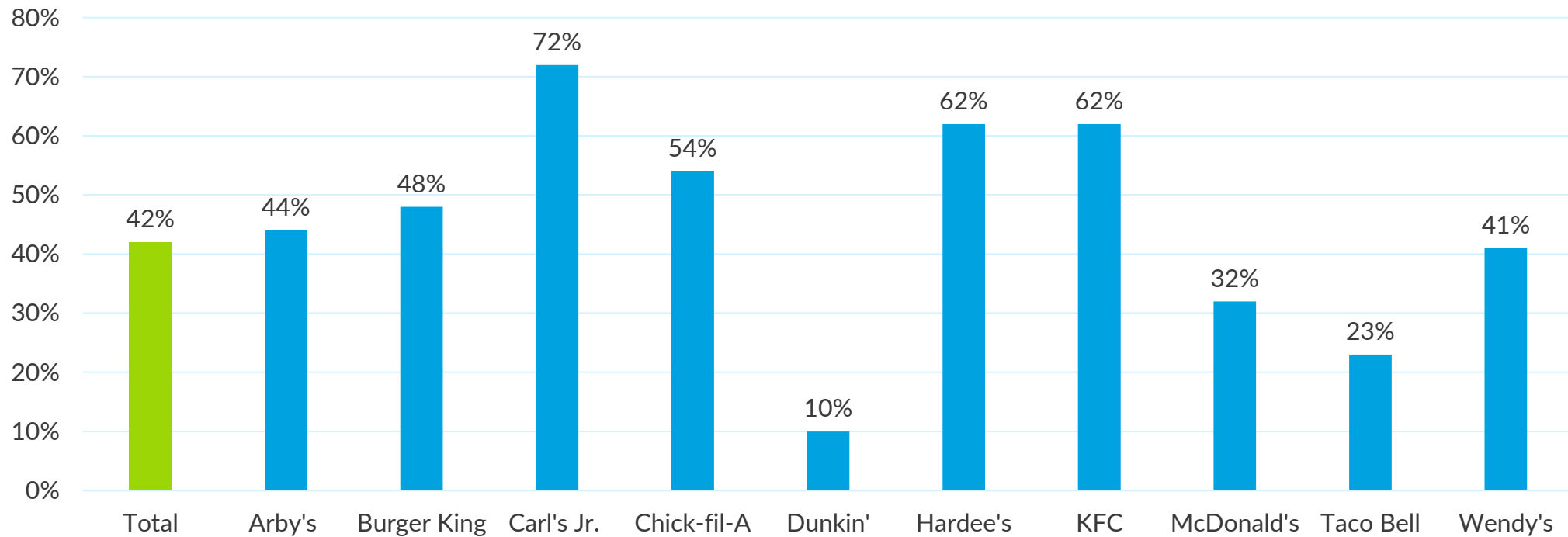


# Suggestive Selling by brand

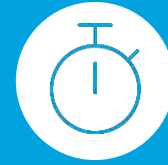


Suggestive Selling is not consistently used by brands, with data showing that the tactic was applied less than ½ the time overall.

Suggestive Selling by Brand

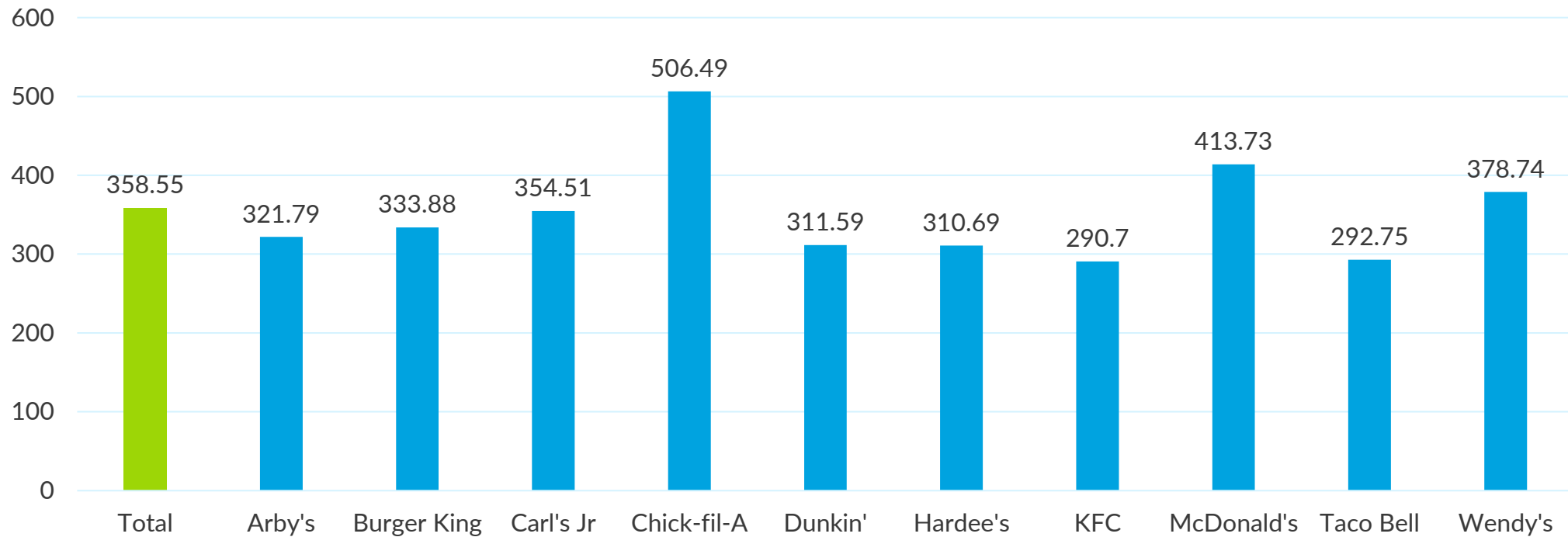


# Average time with Suggestive Selling

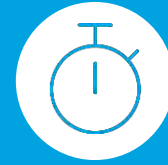


When offering a suggestive sell, KFC had the quickest average total time.

Average Total Time (in seconds) with Suggestive Sell

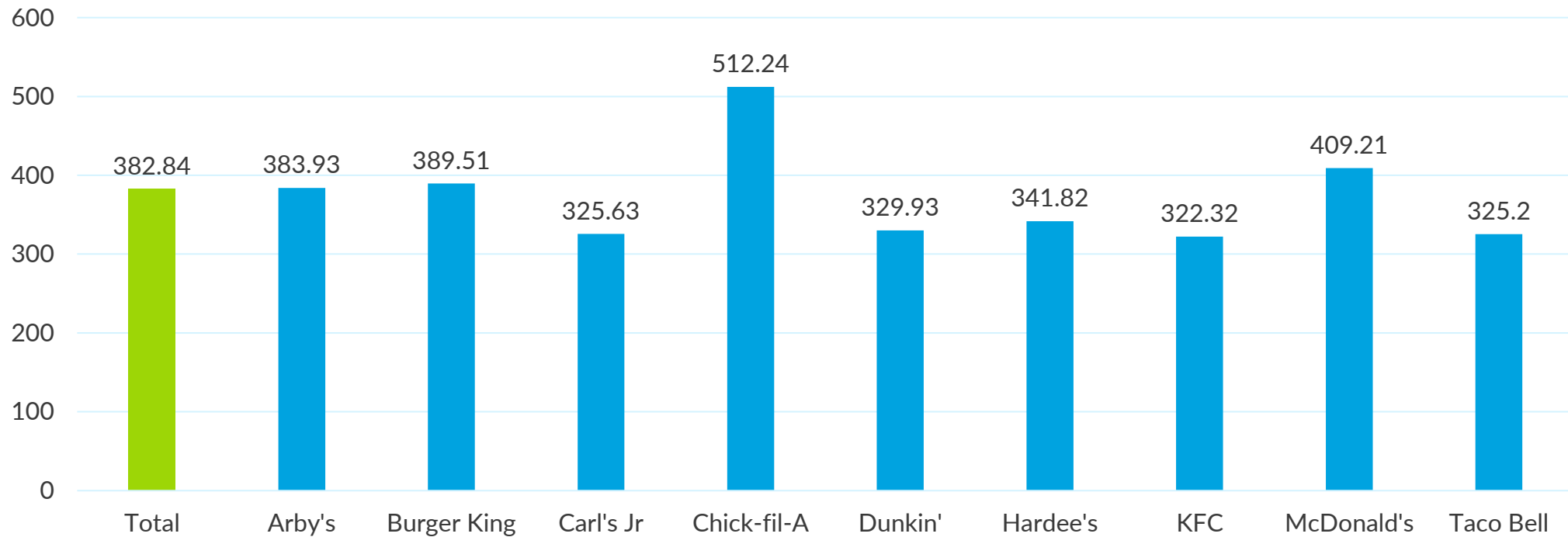


# Average time without Suggestive Selling



KFC also had the quickest total time when not offering a suggestive sell.

Average Total Time (in seconds) without Suggestive Sell



# Service & Satisfaction



# Category Definitions

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## Satisfaction with Level of Service:

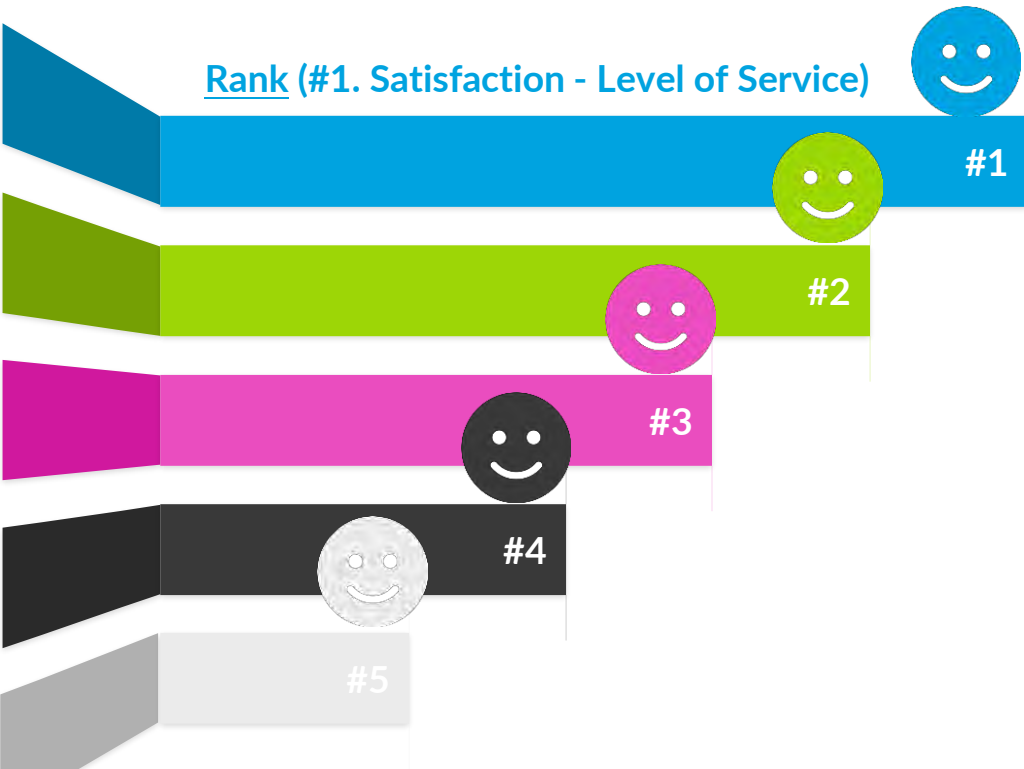
Satisfaction with Level of Service measures how satisfied shoppers were with the overall drive-thru experience, staff friendliness, and customer expectations regarding speed and experience. Shoppers were asked to select if they were Satisfied or Not Satisfied.

## Friendliness:

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

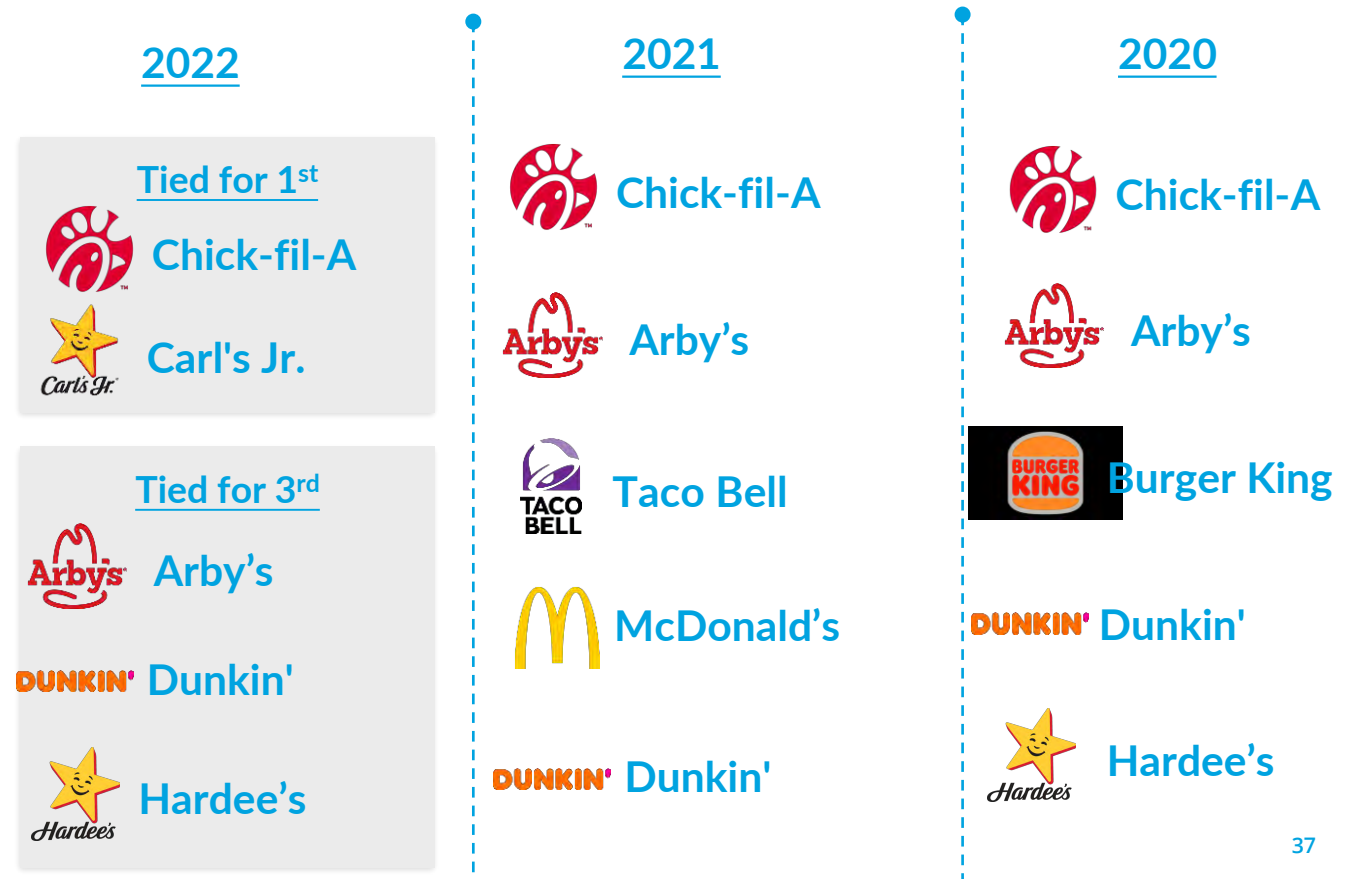
# Category Leaders: Satisfaction with Service

Rank (#1. Satisfaction - Level of Service)




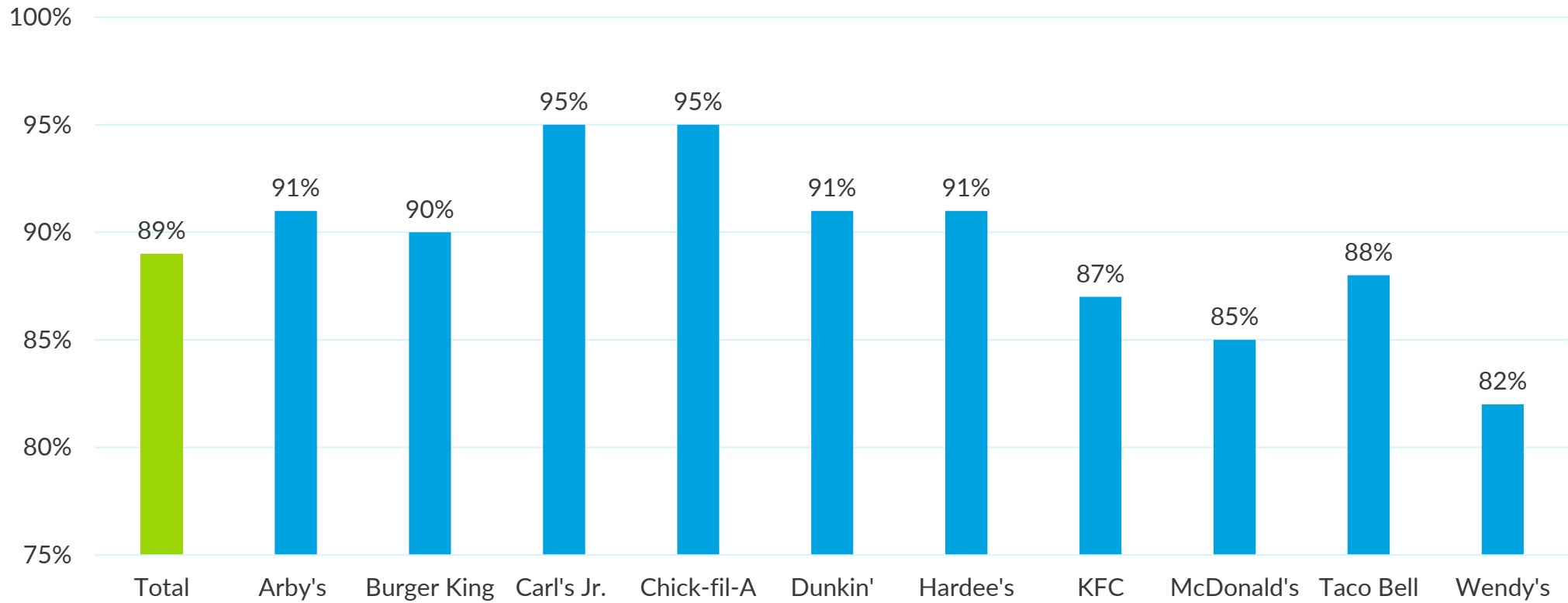
n=1537

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.



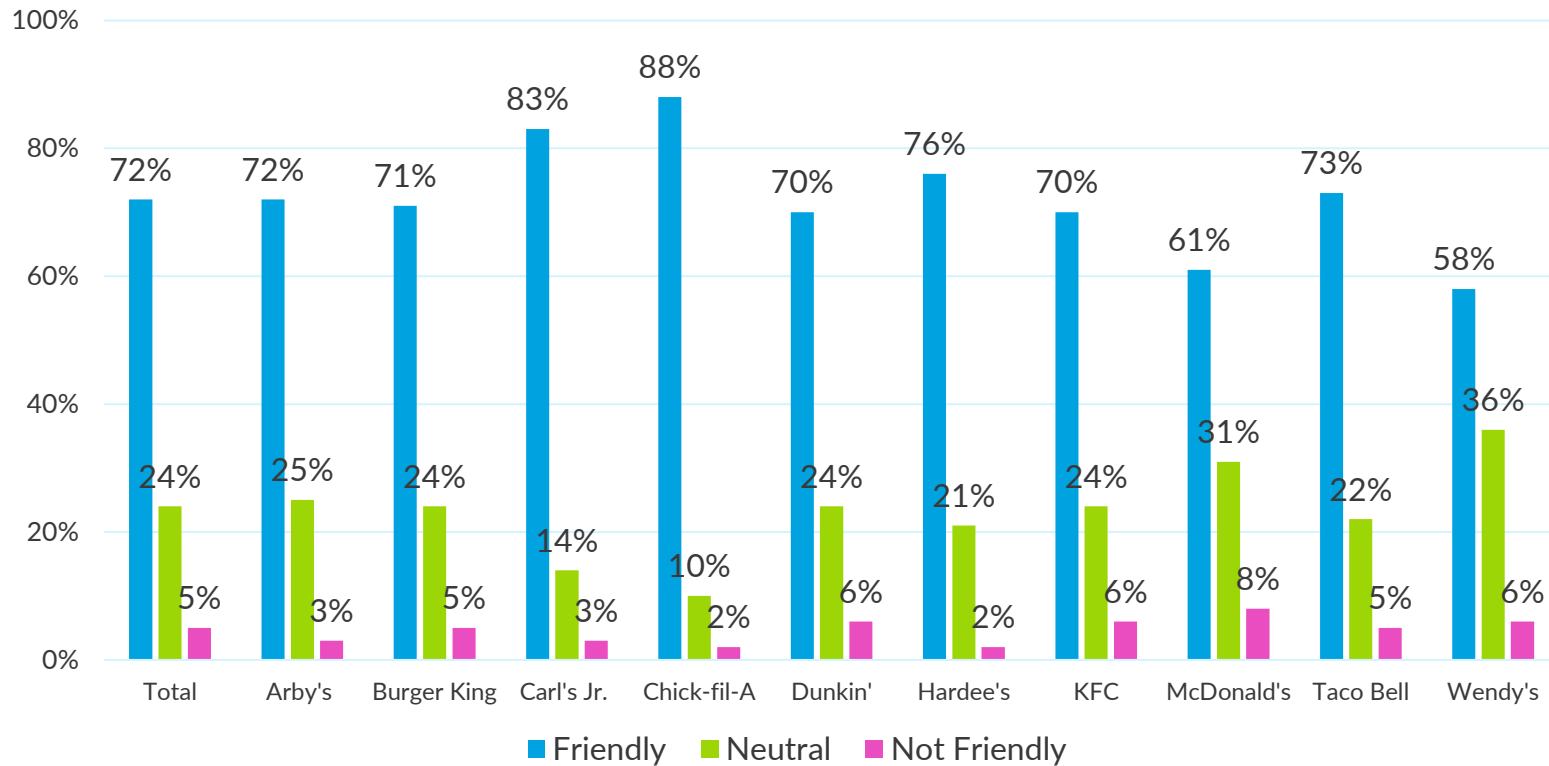
# Satisfaction by Brand

 Carl's Jr. and Chick-fil-A had the highest rated satisfaction.






# Friendliness 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., Hardees, Arby's)**

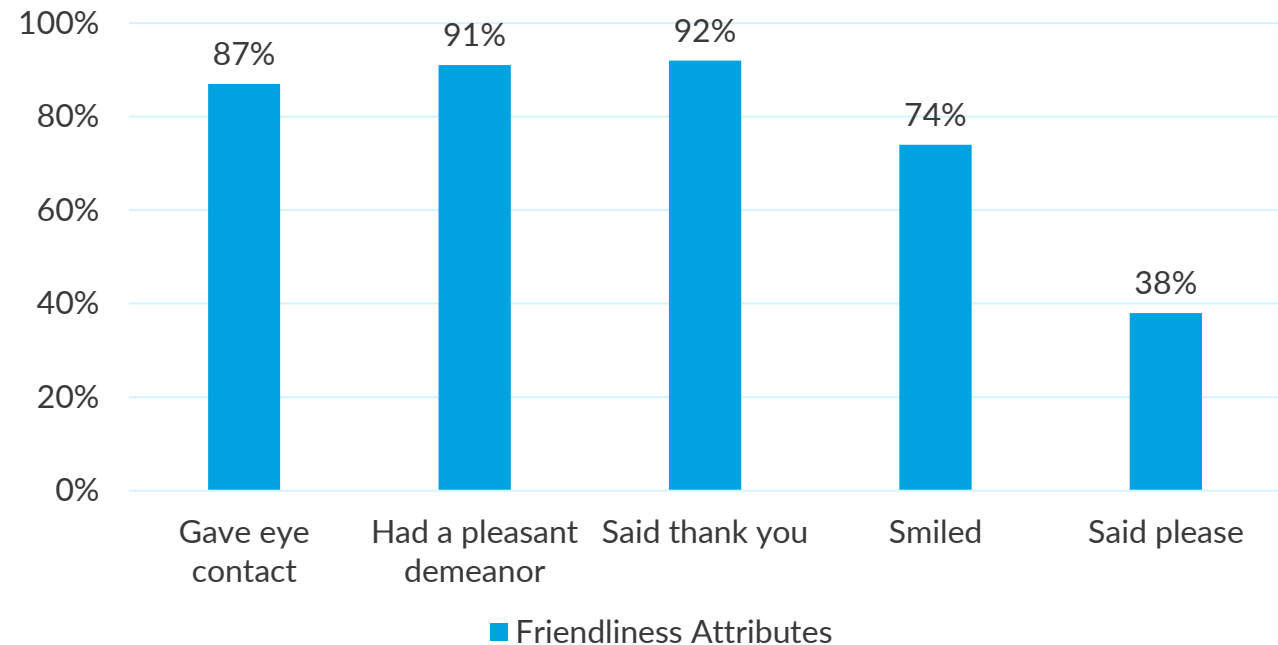


To measure friendliness, Shoppers were asked to rate the service received on the following scale:

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

# Friendliness Attributes

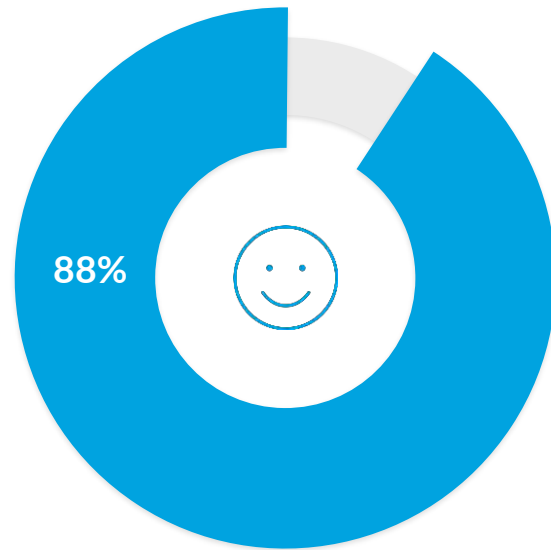
Regardless of how the Shopper rated the location on being friendly, we asked them to indicate which friendliness attributes they did see demonstrated by employees.



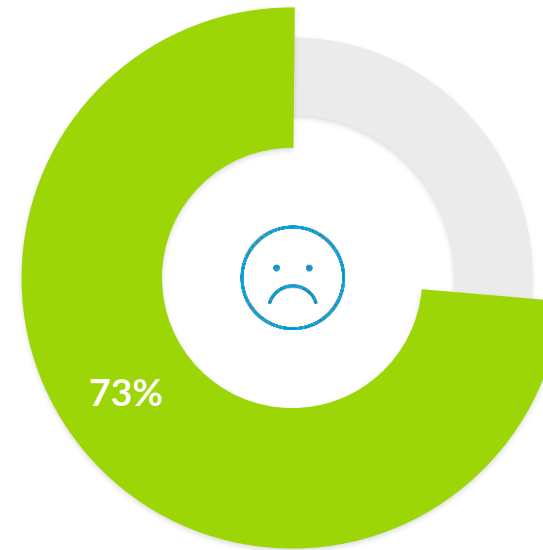
# The Friendliness Effect: Impact on Accuracy



Orders are 15% more accurate with friendly service.



Accurate Orders with  
Friendly Service  
(Friendly)



Accurate Orders without  
Friendly Service  
(Neutral / Not Friendly)

# The Friendliness Effect: Impact on Time



Orders are 212 seconds, or  
3 minutes and 32 seconds,  
faster with friendly service.



Time WITH Friendly Service

5m 43s



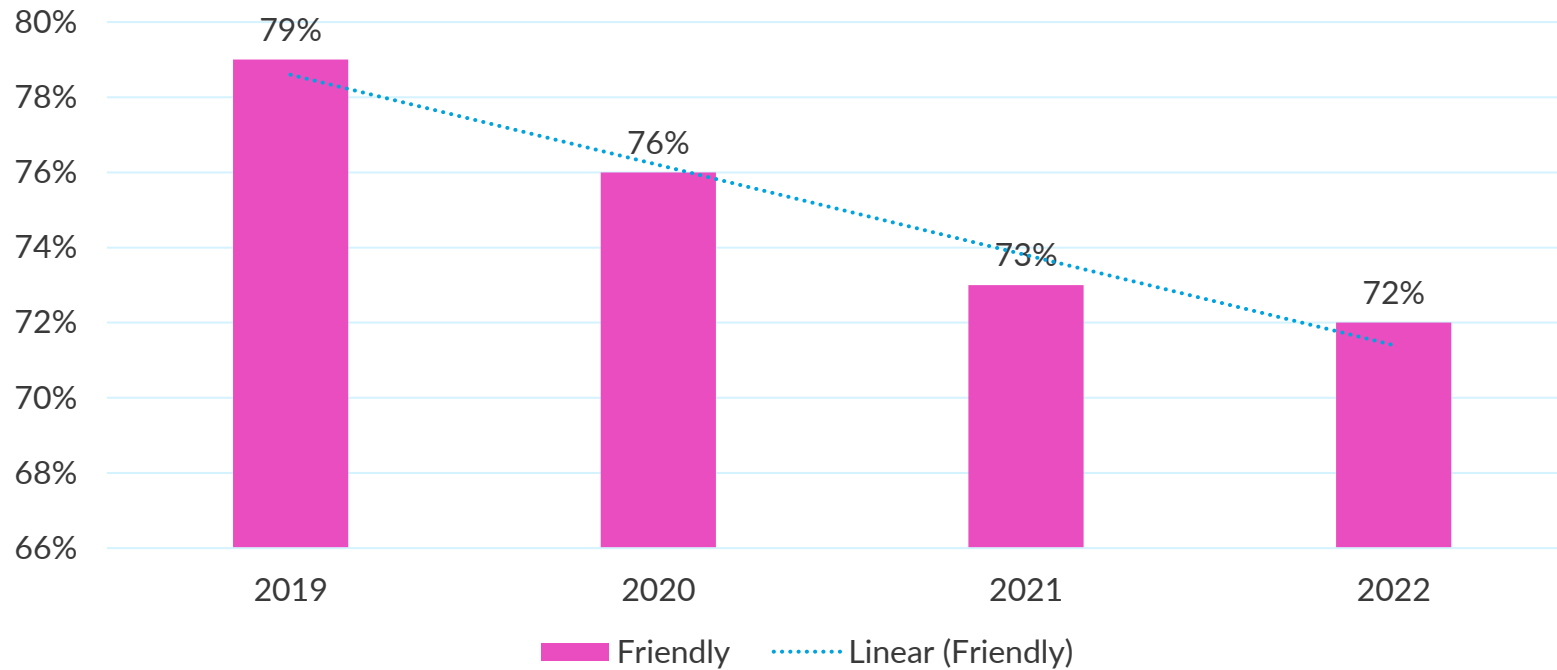
Time WITHOUT Friendly Service

9m 15s

# Friendliness Over Time



Despite having a significant impact on accuracy and time, friendliness continues to decline.



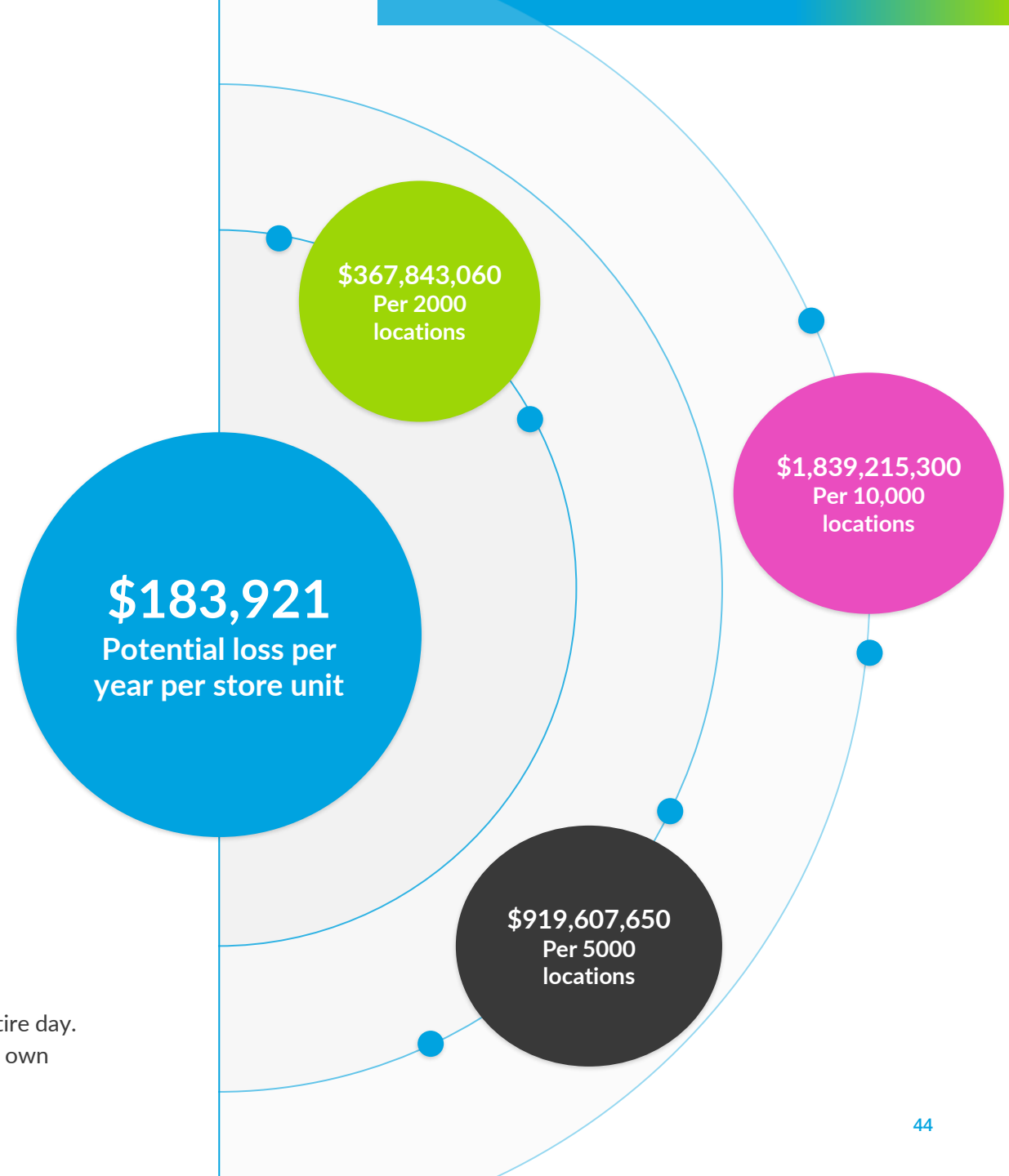
# The Bottom Line

## Unfriendliness costs you

Based on an average meal cost of \$9.02, and a difference of 212 seconds between friendly and unfriendly orders, annual losses due to unfriendly staff adds up.

**What is your brand doing to improve staff friendliness and eliminate these unnecessary costs?**

\*\*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.

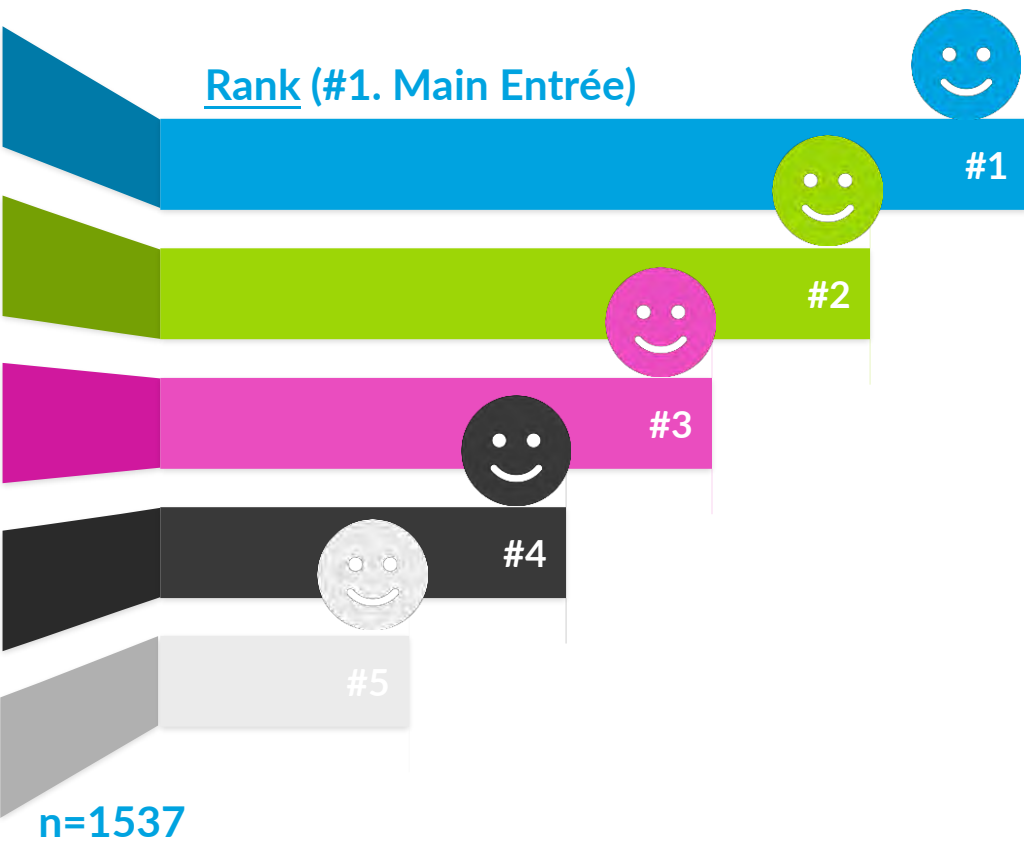


# Food Quality

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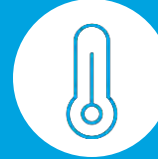
# Category Leaders: Food Quality



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.

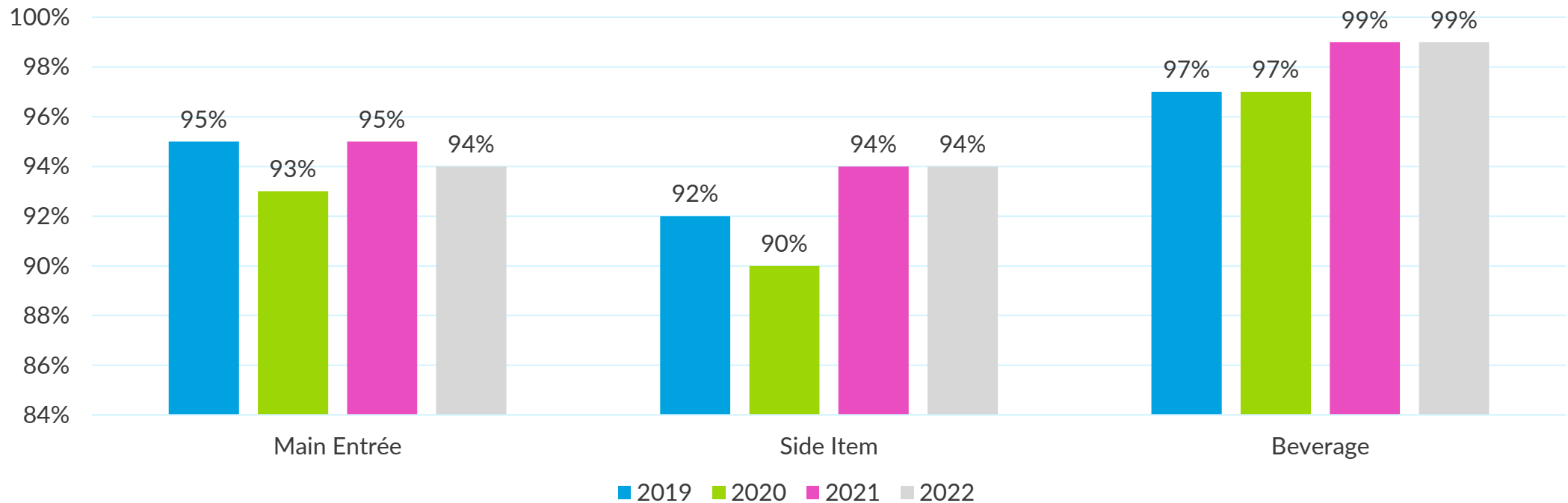
2022	2021	2020
<p><u>Tied for 1<sup>st</sup></u></p> <ul style="list-style-type: none"> <li>Chick-fil-A</li> <li>Taco Bell</li> </ul>	<ul style="list-style-type: none"> <li>Chick-fil-A</li> <li>Arby's</li> </ul>	<ul style="list-style-type: none"> <li>Chick-fil-A</li> <li>Arby's</li> </ul>
<p><u>Tied for 3<sup>rd</sup></u></p> <ul style="list-style-type: none"> <li>Arby's</li> <li>Dunkin'</li> <li>Wendy's</li> </ul>	<ul style="list-style-type: none"> <li>Taco Bell</li> <li>McDonald's</li> <li>KFC</li> </ul>	<ul style="list-style-type: none"> <li>McDonald's</li> <li>Burger King</li> <li>Dunkin'</li> </ul>

# Food Temperature




Temperature was as expected for 99% of beverages and 94% of main entrées and side items in 2022.

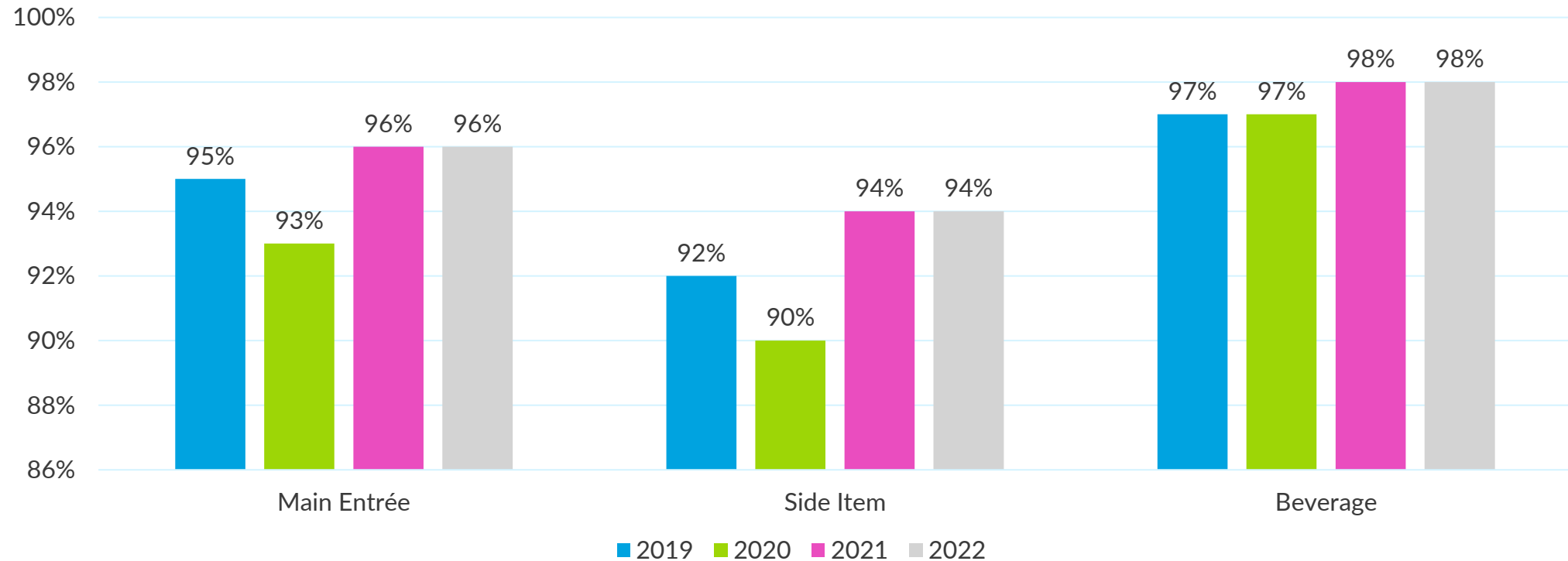
Temperature as Expected



# Portion Size

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

Portion as Expected



# Find out how your brand measures up

>> **Secure your spot for next year's study!**

## What's included:

- **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.



Book by December 15, 2022 to secure a 10% discount on the package price.

**Full package price: \$9,995**

**Book now for just \$8,995**

Contact us to learn more:  
[letschat@intouchinsight.com](mailto:letschat@intouchinsight.com)

# About Intouch

Intouch Insight is a CX solutions company, specializing 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 touch points, giving them actionable, real-time insights in an advanced analytics platform. Founded in 1992, Intouch is trusted by over 300 of North America's most-loved brands for their customer experience management, customer survey, mystery shopping, mobile forms, operational and compliance audits, geolocation data capture and event marketing automation solutions. For more information, visit [www.intouchinsight.com](http://www.intouchinsight.com).

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