



24<sup>th</sup> Annual

# Drive-Thru Study

In Partnership with: **QSR**



# About Intouch

At Intouch Insight, we specialize 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 solutions, including mystery shopping and operational audits, feedback surveys, mobile forms and checklist software, reputation management, and more.



For more information, visit [www.intouchinsight.com](https://www.intouchinsight.com).

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Glossary

# Be Part of Our 25<sup>th</sup> Anniversary Edition

Curious about how your brand measures up to the top names in the industry?  
Become a Challenger Brand and find out!

For just \$9,995 USD, you'll receive:

- **Your Brand Data:** 150 mystery shops conducted at your locations, including all shopper fees and food reimbursements.
- **Complete Research Package:** Access your results alongside those of 10 benchmark brands, with raw data files included.
- **Custom Reporting:** Your portal will come pre-loaded with custom dashboards tailored to your brand, plus a personal advisory call to review the results.



Don't miss your chance to **be part of the 25th anniversary Drive-Thru Study next year**— it's going to be a big one! Secure your spot now: [letschat@intouchinsight.com](mailto:letschat@intouchinsight.com).

# About The Study

The Intouch Insight Annual Drive-Thru study has been examining drive-thru performance for 24 years, with a long history of setting the industry benchmark for drive-thru performance.

This year, in addition to our core 10 brands, we are thrilled to welcome Raising Cane's, a fast-growing brand from the chicken category, to this year's study.



24<sup>th</sup>  
Annual





# Introduction

At its core, the Annual Drive-Thru Study is a time-based study that uses mystery shopping to capture industry performance benchmarks by evaluating leading QSR brands.

Unlike traditional consumer surveys, this study captures data through real-time, unannounced visits by mystery shoppers. This approach allows us to measure key metrics such as **speed of service, order accuracy, suggestive selling, food quality, and overall customer satisfaction with the level of service** with unparalleled precision.



# Where and When

## # Shops Performed by Brand

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

Breakfast (5:00am – 10:29am)	Lunch (10:30am – 1:30pm)	Late afternoon (1:31pm – 4:00pm)	Late afternoon (4:01pm – 7:00pm)
<b>7%</b>	<b>40%</b>	<b>12%</b>	<b>41%</b>

\*Shops were distributed over various times of the day for a representative sample of consumer purchasing patterns throughout the day.



**June 2024 -  
July 2024**



**Geographically  
Distributed**



**1651 Drive-Thru  
Shops Completed**

# New for 2024

As we prepare for the upcoming 25th anniversary of our study next year, we are excited to announce some updates.

## Brands Included

In this year's study, we have combined Carl's Jr. and Hardee's into a single entity, presenting their data together.

As mentioned, we are thrilled to introduce Raising Cane's as a new brand. This beloved chicken chain, founded in 1996, now has over 800 locations across 5 countries.

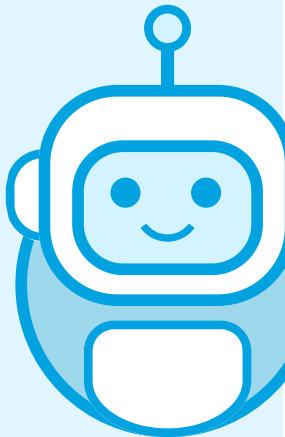


## Impact of AI

This year, to understand the impacts of Voice-AI technology on order taking, we introduced a new element to the study to investigate the impact of this tech on the core study metrics.

As the industry is currently testing this technology, adoption is still low. This is reflected in our study data, with **only 4% of visits involving Voice-AI technology to facilitate order taking**. As such, the data presented provides an indication of where this technology may take the industry, but does not provide a definitive measure of performance at this time.

Interaction with Voice-AI		Number of Orders	Percentage
✘	Did Not Interact	1,317	92%
✔	Did Interact	58	4%
?	Unsure	54	3%
Total Orders		1,424*	100%



This excludes any orders taken face-to-face by an employee walking the drive-thru line.

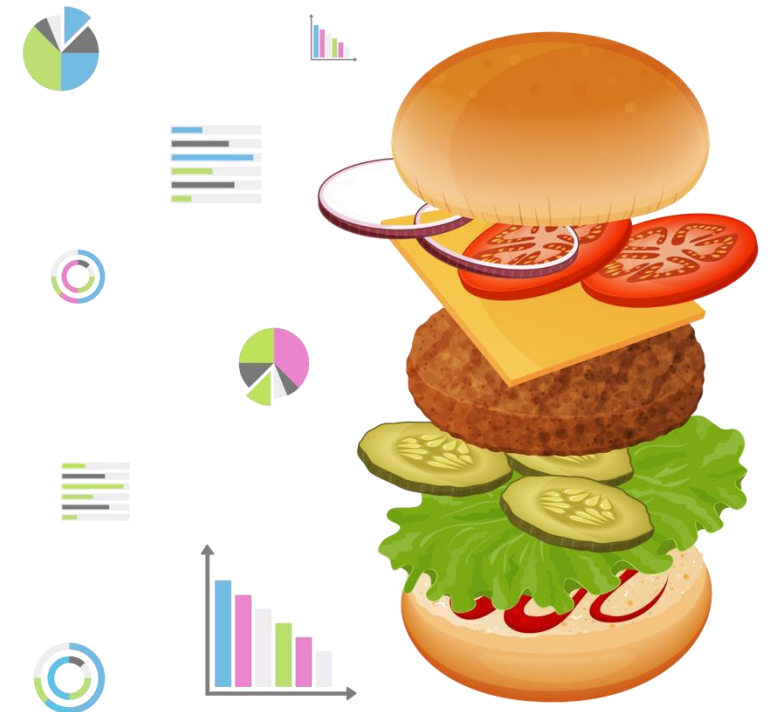


# Exclusive Access to In-Depth Insights

To gain full access to the complete dataset, you can purchase it for **just \$4,999 USD**.

## With your purchase, you'll receive:

- Comprehensive Study Findings:
  - Organized in the Intouch Insight platform.
  - Interactive and impactful dashboards.
  - Granular filters for detailed analysis.
  - Pre-built visualizations ready to use.
- Raw Data Files: For your own custom analysis.
- Platform Orientation: A guided session to help you navigate the platform and make the most of the data.



**Ready to access the full dataset?**  
Contact us at [letschat@intouchinsight.com](mailto:letschat@intouchinsight.com).



# Speed

Speed is one of the key metrics for drive-thru efficiency and customer satisfaction. Faster service means more orders can be processed in less time, which leads to maximizing revenue potential and profitability for the restaurant.

Over the past two years, **the average total time has improved from 6 minutes and 13 seconds to 5 minutes and 29 seconds**. Additionally, **the service time has shown notable progress, dropping from 4 minutes and 22 seconds last year to 4 minutes and 5 seconds this year**, demonstrating a solid improvement in efficiency.

When the shoppers did not have to repeat their order the service time was 27 seconds faster than if they did, highlighting the importance of ensuring all equipment is in proper working order, and that crew members are enabled to pay close attention to the customer, minimizing the need to have them repeat their order.



# 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. 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.



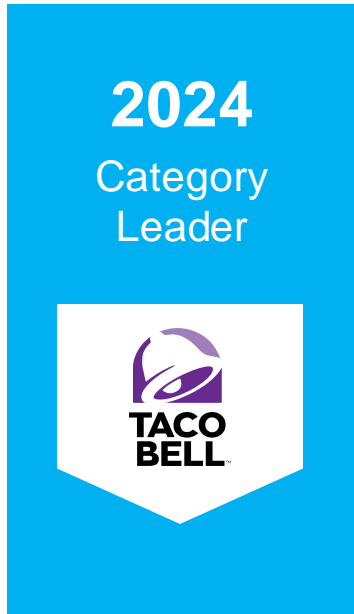
When the **speaker volume was loud enough to hear**, compared to when it was not.



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



# Category Leaders: Fastest Total Time

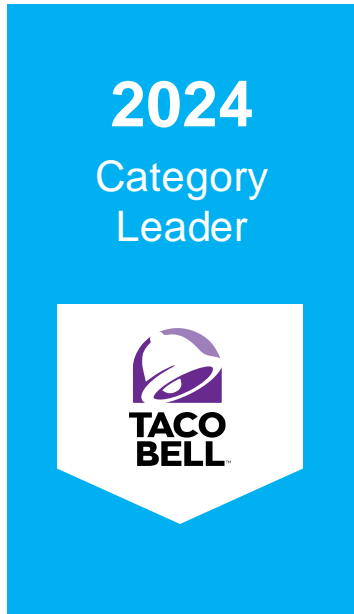


	2024	2023	2022
1	Taco Bell	Taco Bell	KFC
2	KFC	KFC	Taco Bell
3	Arby's	Carl's Jr.	Hardee's
4	Dunkin'	Arby's	Dunkin'
5	Wendy's	Dunkin'	Carl's Jr.

**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.

# Category Leaders: Fastest Service Time

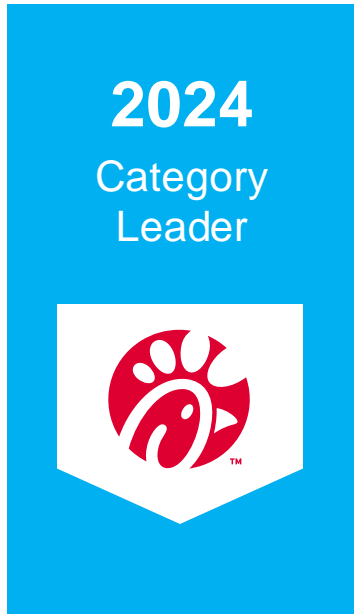
**Service time** is the amount of time it took the shopper to order and receive their food.



	2024	2023	2022
1	Taco Bell	Taco Bell	Taco Bell
2	KFC	Wendy's	Dunkin'
3	Wendy's	KFC	KFC
4	Arby's	Dunkin'	Arby's
5	Dunkin'	Carl's Jr.	Burger King



# Category Leaders: Fastest Total Time by Car



	2024	2023	2022
1	Chick-fil-A	Chick-fil-A	Chick-fil-A
2	Raising Cane's	McDonald's	McDonald's
3	McDonald's	Wendy's	Taco Bell
4	Wendy's	Taco Bell	Arby's
5	Taco Bell	Burger King	Dunkin'

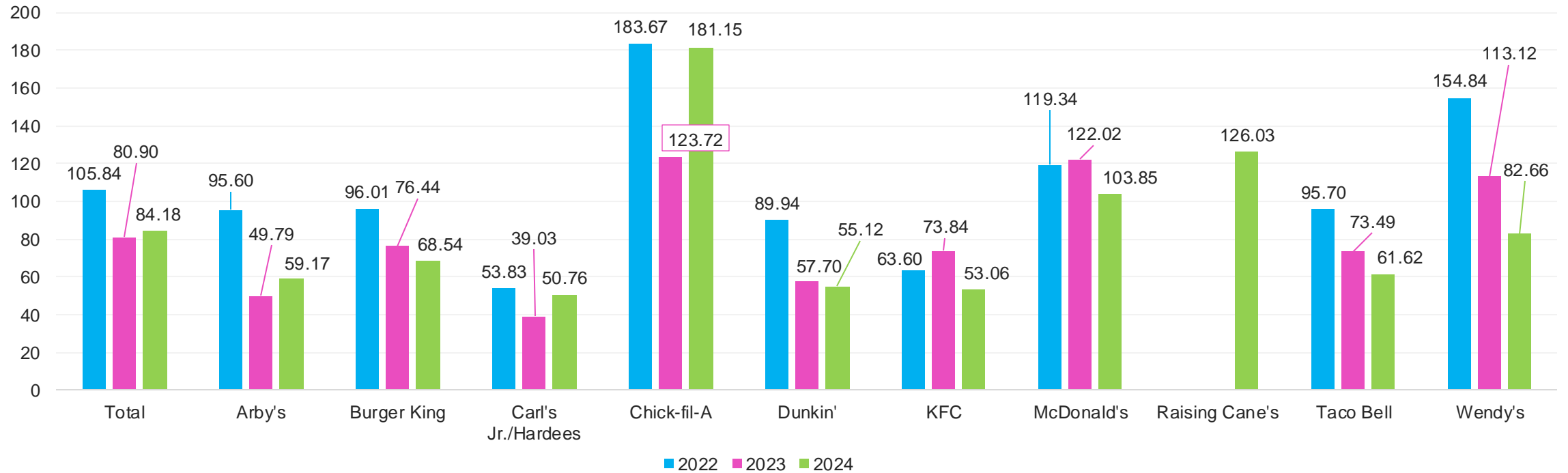
Calculated by dividing the **average total time** by the **average cars in line**. Shoppers are instructed to count the number of vehicles in their lane, in front of their vehicle, up to the speaker.



6 brands saw faster wait times in 2024 over 2023.

# Wait Time

**Average Wait Time (in seconds) by Brand**

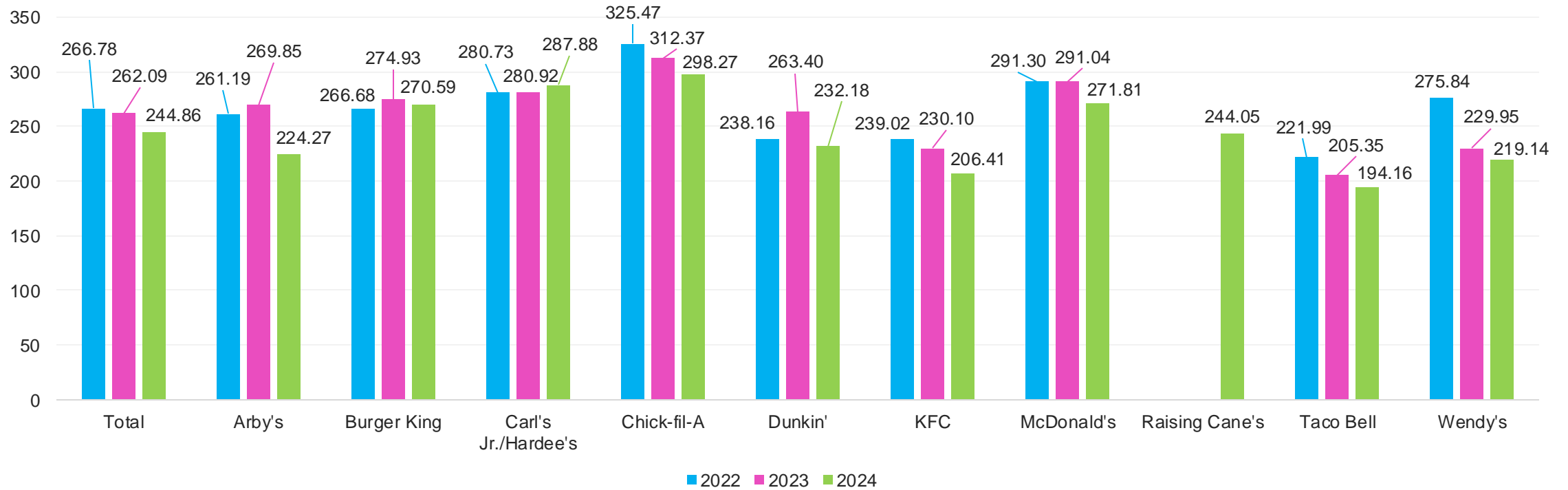




8 brands saw improvements in service time in 2024 over 2023.

# Service Time

**Average Service Time (in seconds) by Brand**

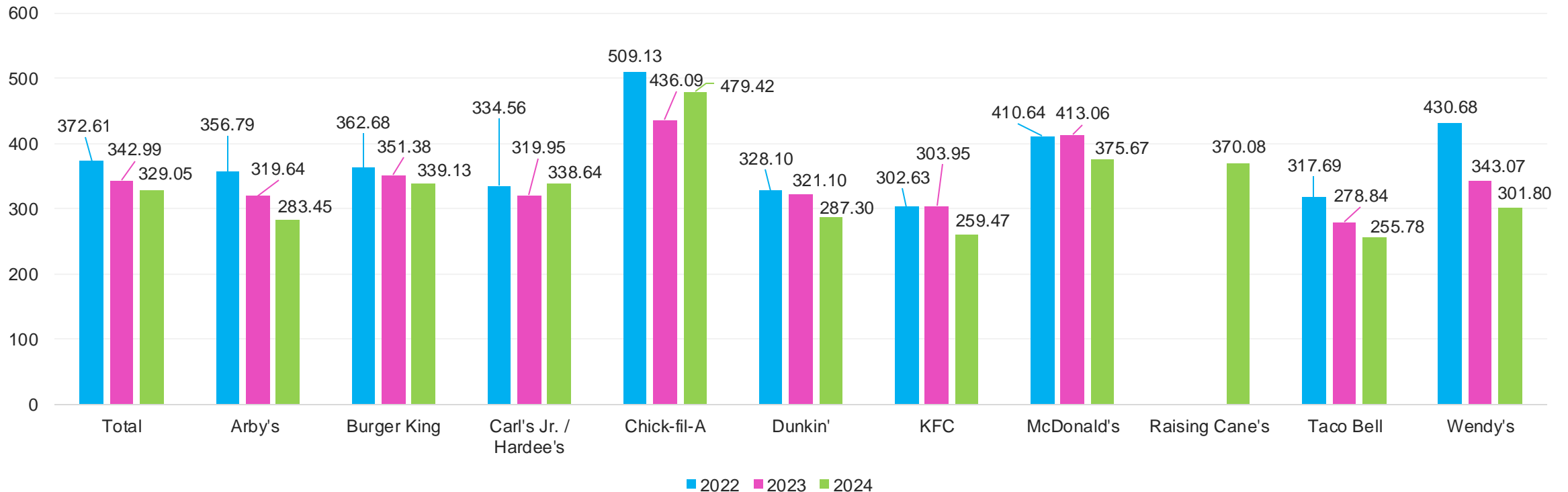


# Total Time



Total time for the study was 14 seconds faster this year compared to last, adding to the 29-second improvement from 2022 to 2023.

**Average Total Time (in seconds) by Brand**

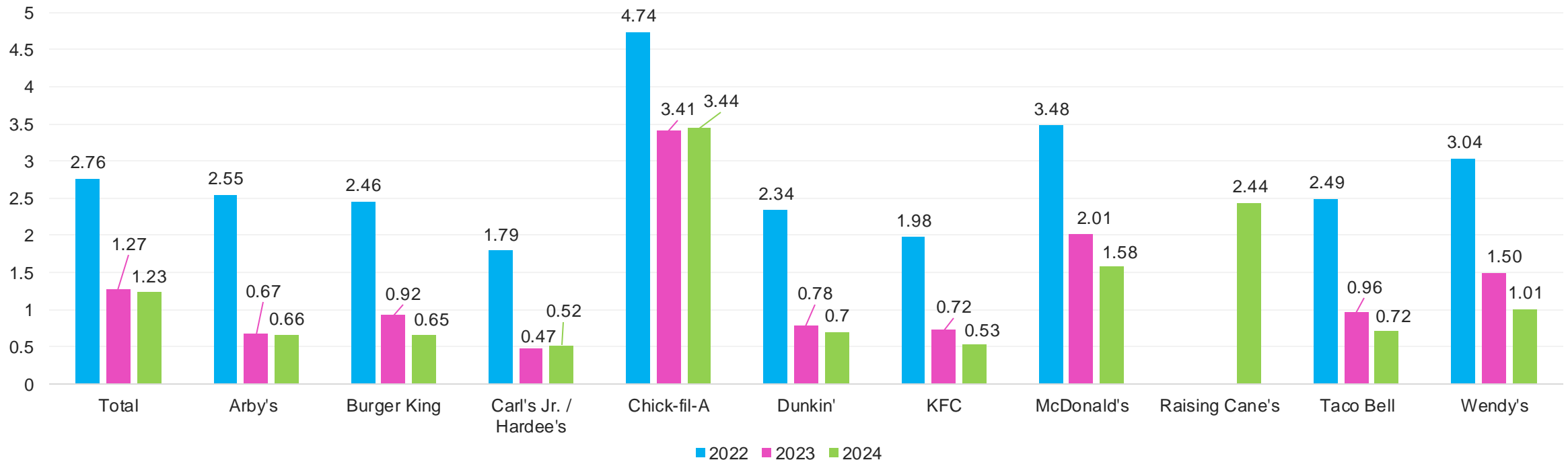


# Cars in Line to the Speaker

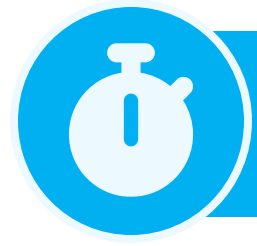


While all brands saw notable decreases in the average number of cars in line from 2022, the decrease from 2023 to 2024 was minimal.

**Average # Cars in Line by Brand**



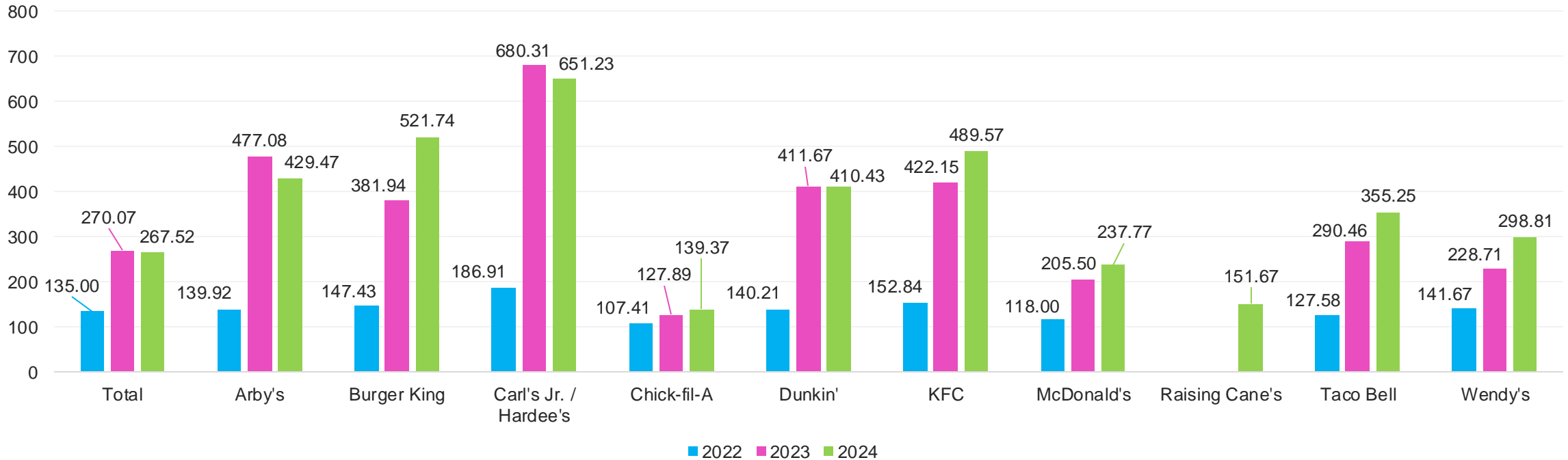




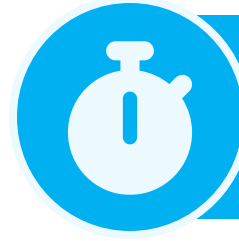
A key factor affecting drive-thru time is the number of vehicles in line. To ensure a fair comparison across different locations, we divided the total wait time by the number of vehicles, putting everyone on an even playing field.

# Total Time by Cars in Line

Average Total Time (in seconds) by Cars in Line

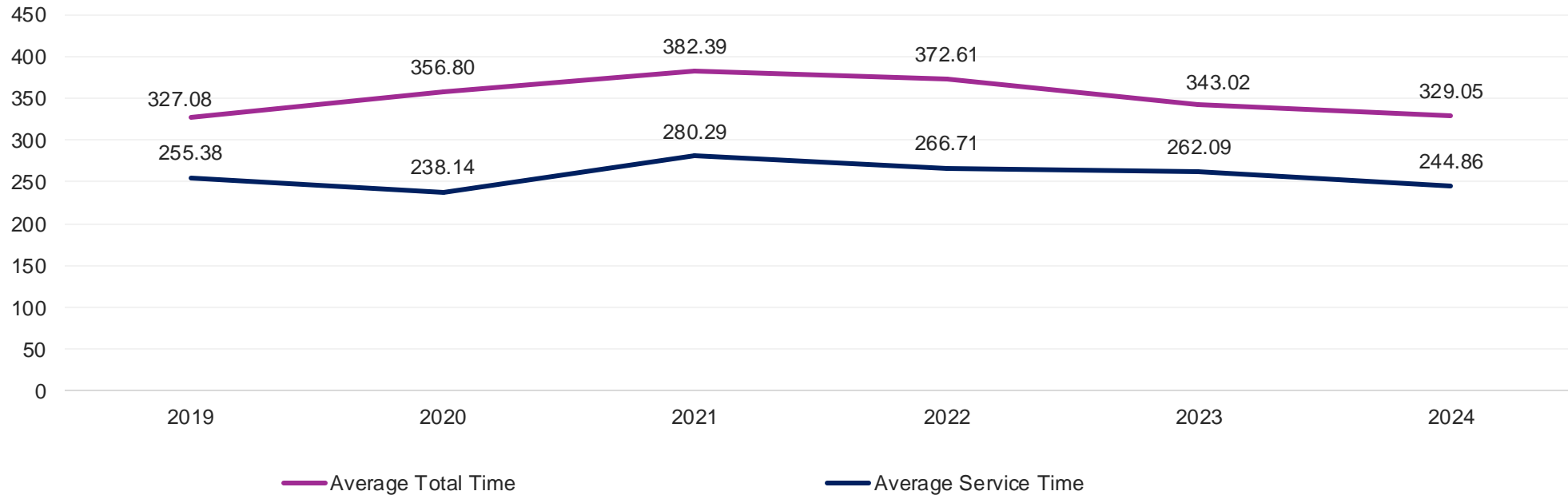


# Speed of Service



Although the total time is faster this year than the previous three years, it is still not at the same level as before the pandemic, with 14% of our shoppers saying the speed of service was slower than expected.

Speed of Service (in seconds) Over the Years

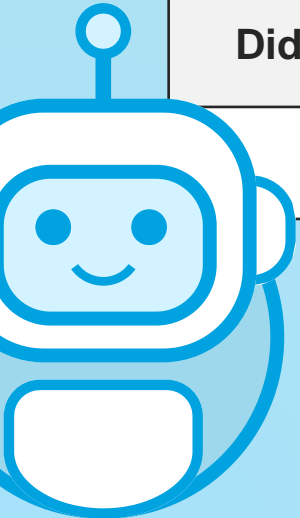


# Insights Into The Future: AI's role in improving drive-thru experiences.

Notably, in the **58 orders** where the mystery shopper reported that they were ***interacting with a Voice-AI technology***, we saw ***faster total time by 29 seconds*** compared to the overall average total time of the study of 5 minutes 29 seconds.

Did you know you were interacting with Voice-AI?	Total Time
Yes	5m 00s

This suggests that the use of AI could be effective in streamlining and speeding up the Drive-Thru experience as it is rolled out across more locations.



# What 5 Seconds Can Do to the Bottom Line

Based on an average meal cost of \$11.05, if brands were to improve their **total time** by even 5 seconds, this improvement could have great financial benefits.

<b>\$9,531.95</b>	<b>Potential gain per year per store unit</b>
\$19,063,900.00	Per 2000 locations
\$47,659,750.00	Per 5000 locations
\$95,319,500.00	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 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

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# Accuracy

Order accuracy is a crucial factor in delivering great guest experiences in the drive-thru. When an inaccurate order is handed over to a customer, the chance of the error being addressed is low, as the customer is unlikely to return once leaving the drive-thru.

While we have seen improvements year over year in order accuracy ratings, this year, we still see 11% of orders rated as inaccurate - in other words, 1 out of every 10 orders handed over in the drive-thru has something wrong.

When examining the top issues in order inaccuracies, two of the top three areas showed improvement. Requests for no ice in beverages were not fulfilled 27.7% of the time this year, down from 30% last year. Similarly, incorrect ingredients in the main entrée occurred 9% of the time, compared to 13.8% in 2023.

As drive-thru, and another restaurant technology advances, the emphasis is shifting toward creating a more seamless and intuitive customer experience. For brands, the key challenge now is ensuring that these technologies enhance accuracy and efficiency without sacrificing the human touch that remains vital for customer satisfaction.





# 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:



**15%**  
HIGHER

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



**12%**  
HIGHER

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



**7%**  
HIGHER

















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



# Category Leaders: Order Accuracy

**2024**  
Category Leaders




	2024	2023	2022
1	 Chick-fil-A <span>Tied</span>	 Chick-fil-A	 Arby's <span>Tied</span>
2	 McDonald's	 Burger King	 McDonald's
3	 Carl's Jr.  Hardee's /Hardees	 McDonald's	 Burger King
4	 KFC <span>Tied</span>	 KFC <span>Tied</span>	 Carl's Jr.
5	 Arby's	 Wendy's	 Hardee's

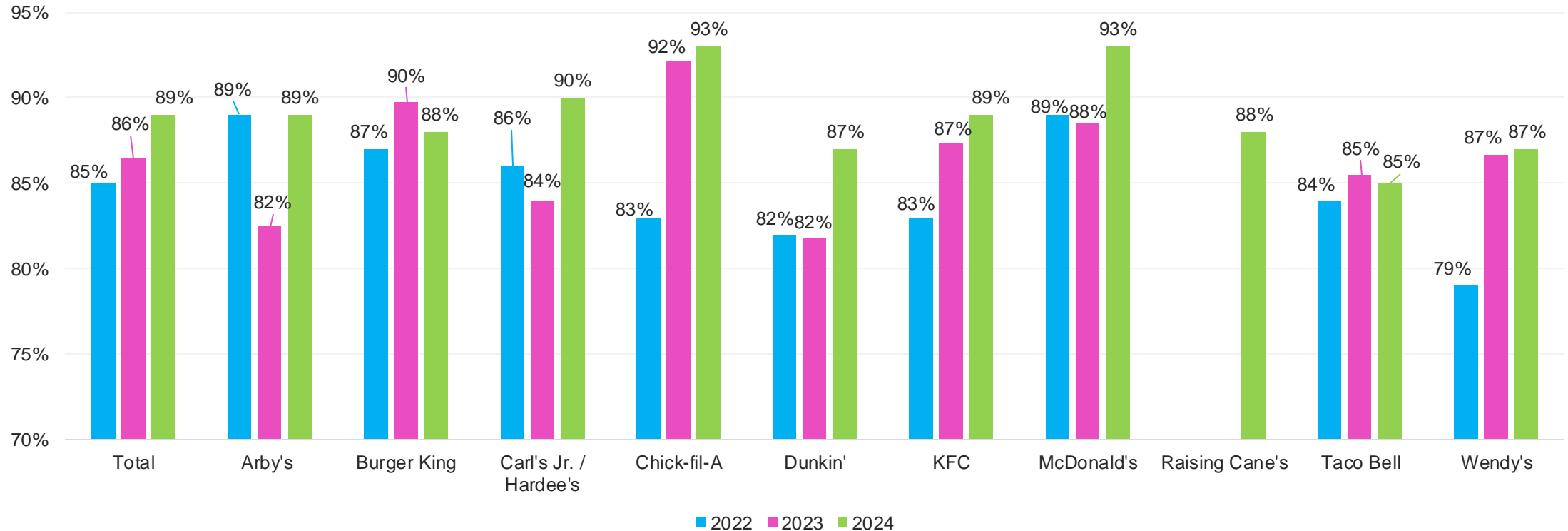
**Order accuracy** measures how accurate the order was including: main entrée, side item, beverage, and any special requests.

# Accuracy by Brand



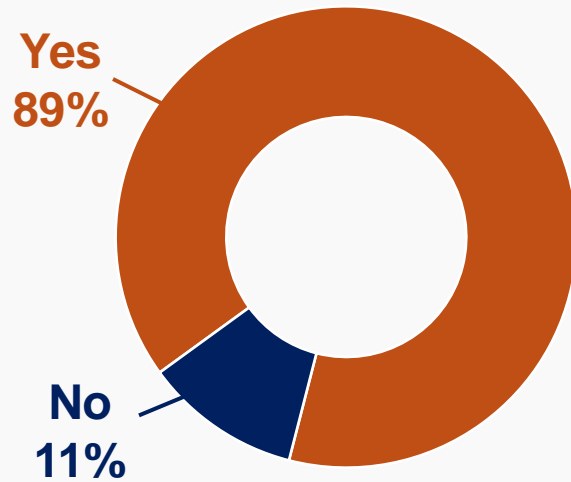
Overall satisfaction was 17% higher when the order was accurate.

**Order Accuracy by Brand**



# Inaccurate Orders

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

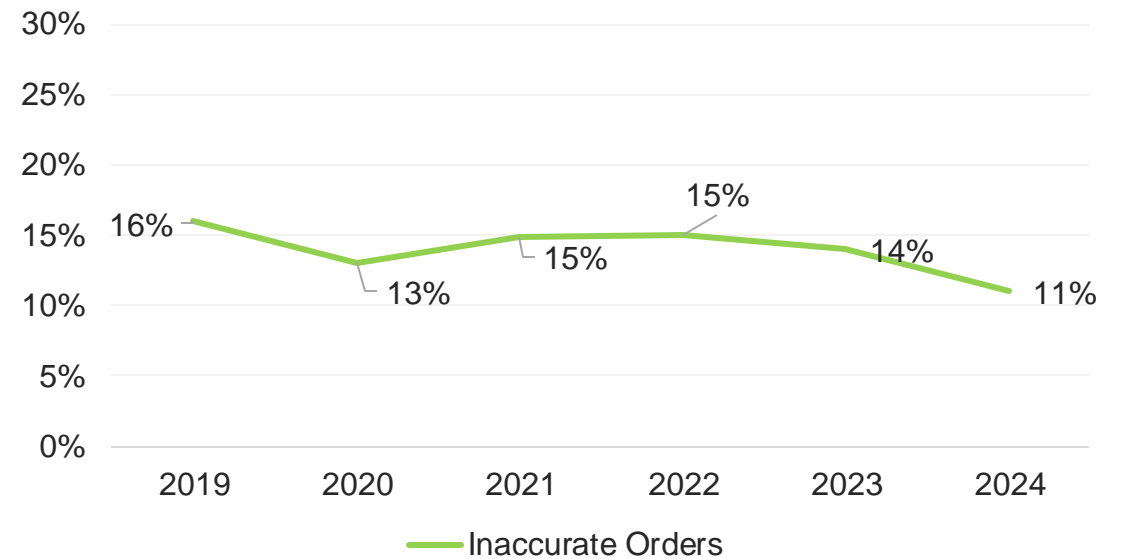


n=1651



In 2024, accurate orders were delivered 50 seconds faster\* than orders filled incorrectly.

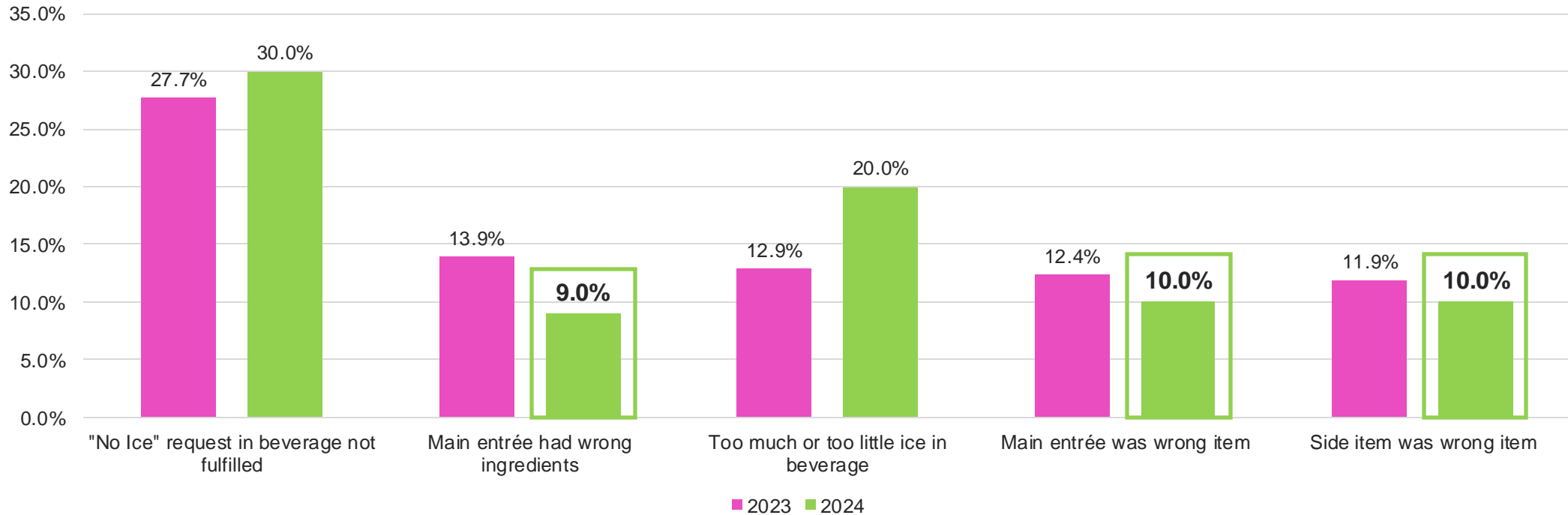
## Inaccurate Orders



\*Based on the Average Total Time.

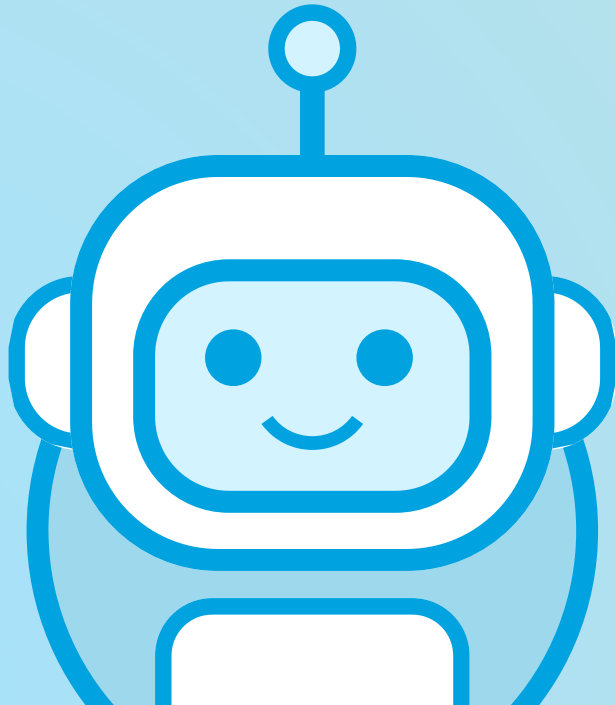
# What went wrong?

## Top 5 Issues



# Insights Into The Future: AI's role in improving drive-thru experiences.

The results suggest that AI can improve order accuracy when integrated into the ordering process, highlighting its potential to enhance customer service quality. In fact, **accuracy reached 95% when shoppers believed they were interacting with Voice-AI**, compared to the overall study accuracy of 89%.



Did you know you were interacting with Voice-AI?	Accuracy
Yes	95%

# Inaccuracy Costs You

Based on an average meal cost of \$11.05, and a difference of 50 seconds between **accurate and inaccurate orders**, annual losses due to inaccurate orders adds up.

<b>\$84,312.61</b>	<b>Potential loss per year per store unit</b>
\$168,625,220.00	Per 2000 locations
\$421,563,050.00	Per 5000 locations
\$843,126,100.00	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 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

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# Suggestive Selling

Suggestive selling has become a powerful tool for brands to not only promote new items but also to increase the average ticket price. The latest data from 2024 shows that the use of suggestive selling in drive-thrus has seen a solid rise, moving up from 56% last year to 64% this year.

This year, we've seen that every brand but one increased the frequency of their suggestive selling.

At McDonald's, for example, shoppers were offered a suggestive sell 60% of the time, up from 46% last year, while Burger King increased their suggestive selling by 16%. With AI playing a key role in this trend, brands can rely on technology to consistently upsell. Unlike human staff, AI never tires, and it doesn't hesitate if a customer says no—it will always offer an additional recommendation, ensuring more opportunities to boost sales.

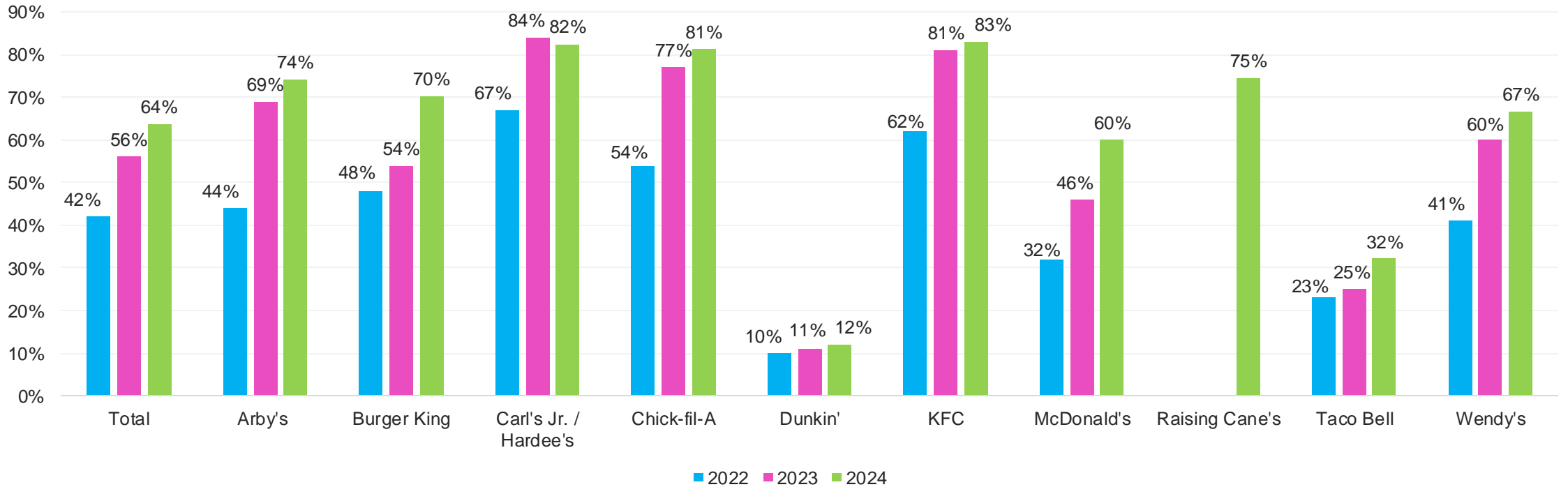




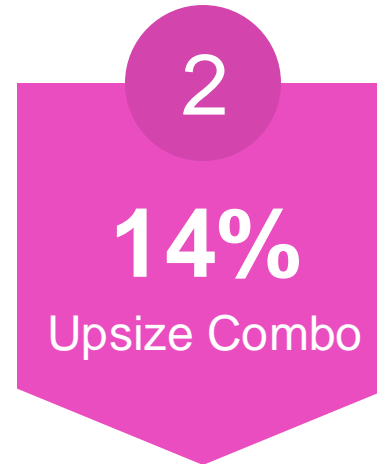
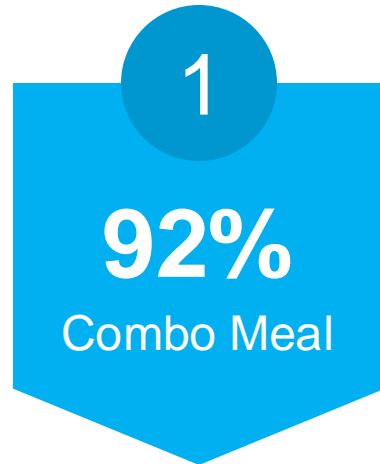
Suggestive Selling has increase year over year since 2022.

# Suggestive Selling

**Suggestive Selling by Brand**



# Top 3 Suggested Items



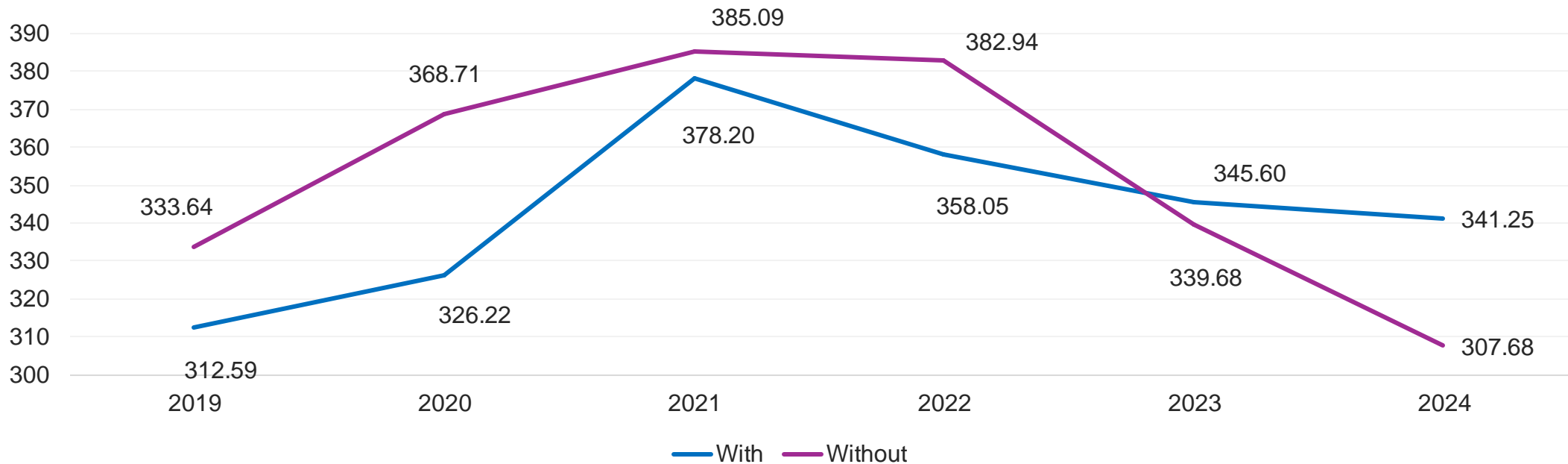
**64%** of shoppers were offered a suggestive sell.

n=1651

# Impact on 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.

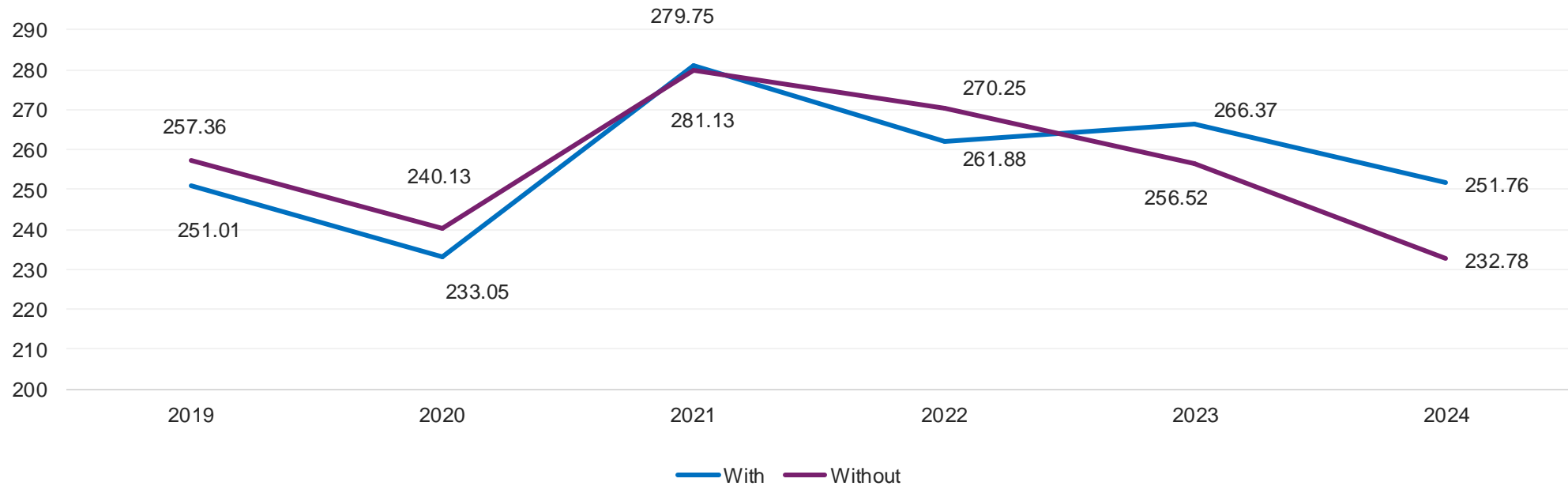
**Average Total Time (in seconds) With and Without Suggestive Selling**



# Impact on 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.

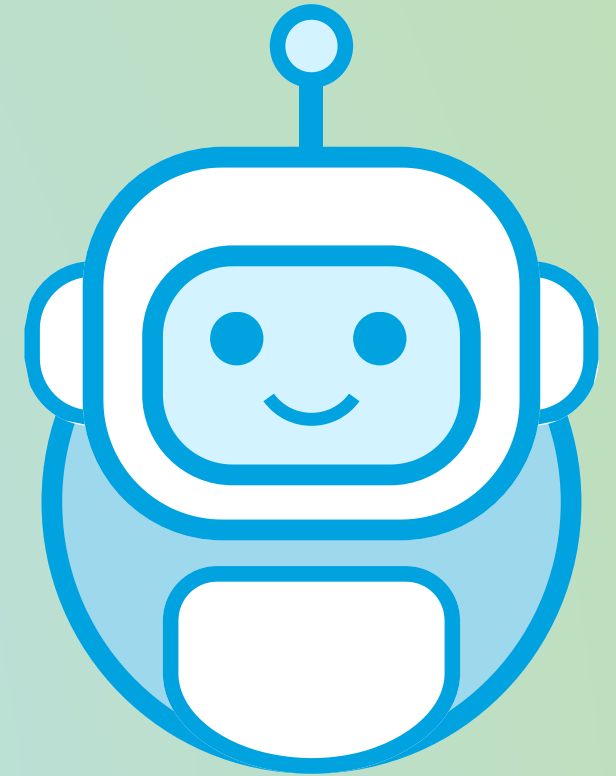
**Average Service Time (in seconds) With and Without Suggestive Selling**



# Insights Into The Future: AI's role in improving drive-thru experiences.

Did you know you were interacting with Voice-AI?	Suggestive Selling
Yes	69%

These findings suggest that **AI may improve suggestive selling** by consistently offering recommendations, potentially boosting sales. When shoppers knew they were **interacting with AI, the success rate was 69%**, compared to the overall study average of 64%.



# Impacts of Voice-AI Tech

On average, the total amount spent when there ***was a suggestive sell*** was \$11.28, compared to \$10.64 when there was not a suggestive sell.

<b>\$35,780.09</b>	<b>Potential loss per year per store unit</b>
\$71,560,180.00	Per 2000 locations
\$178,900,450.00	Per 5000 locations
\$357,800,900.00	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 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](mailto:letschat@intouchinsight.com)





# Food Quality

Food quality is one of the most critical factors in a restaurant's success. When consumers are deciding where to eat, they are more inclined to choose a place known for good quality food and great taste.

As brands work to speed up service and implement technology to enhance the overall customer experience, it's essential not to lose sight of the importance of food quality. Serving tasty food at the right temperature is key to ensuring that all these efforts truly enhance customer satisfaction. Chick-fil-A and Raising Cane's both received a 99% score for the taste of the main item.

By keeping food quality top of mind, restaurants can ensure that their efforts to improve speed and efficiency also lead to a better dining experience overall.



# 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

**2024**  
Category Leaders




	2024	2023	2022
1	 Chick-fil-A <span>Tied</span>	 Chick-fil-A	 Chick-fil-A <span>Tied</span>
2	 Raising Cane's	 KFC	 Taco Bell
3	 Arby's <span>Tied</span>	 McDonald's	 Arby's <span>Tied</span>
4	 McDonald's	 Hardee's	 Dunkin'
5	 Taco Bell	 Dunkin'	 Wendy's

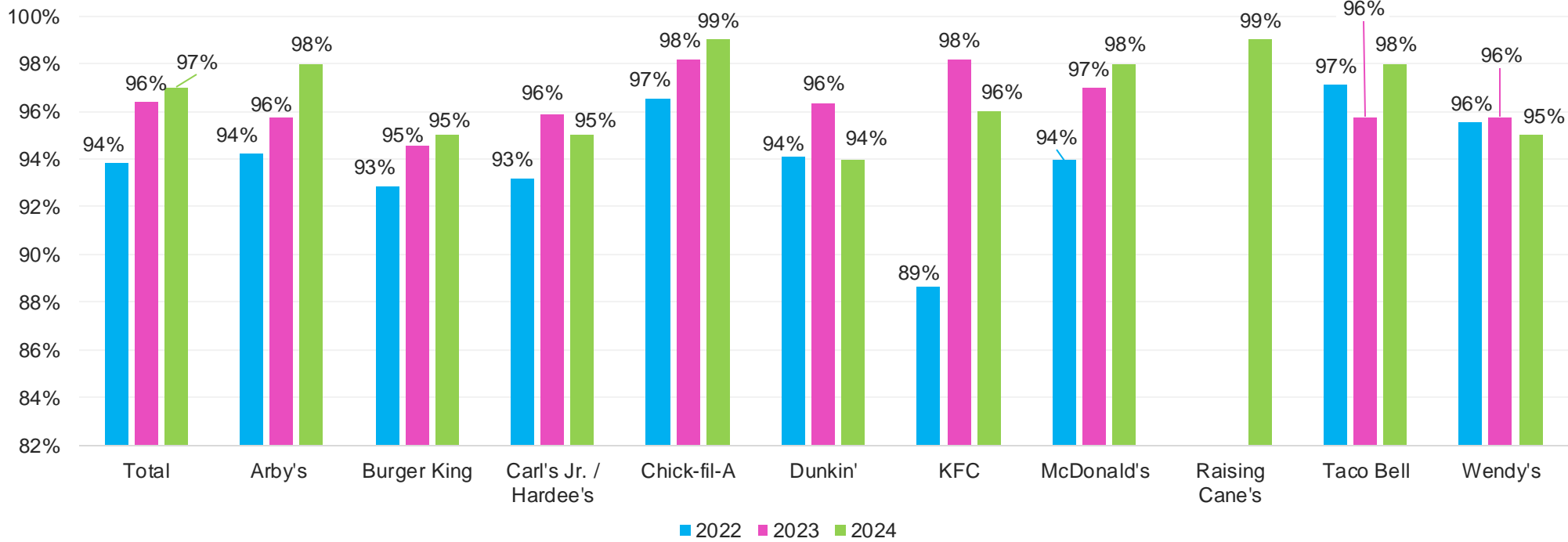
**Food quality** ranking based on whether or not the main entrée tasted as expected. Across all brands, 94% of respondents stated that their main entrée tasted as expected.



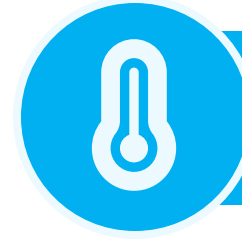
While Chick-fil-A holds the spot for the third year in a row, newcomer Raising Cane's has made a strong debut, tying for first place.

# Taste

**Taste as Expected by Brand – Main Entrée**

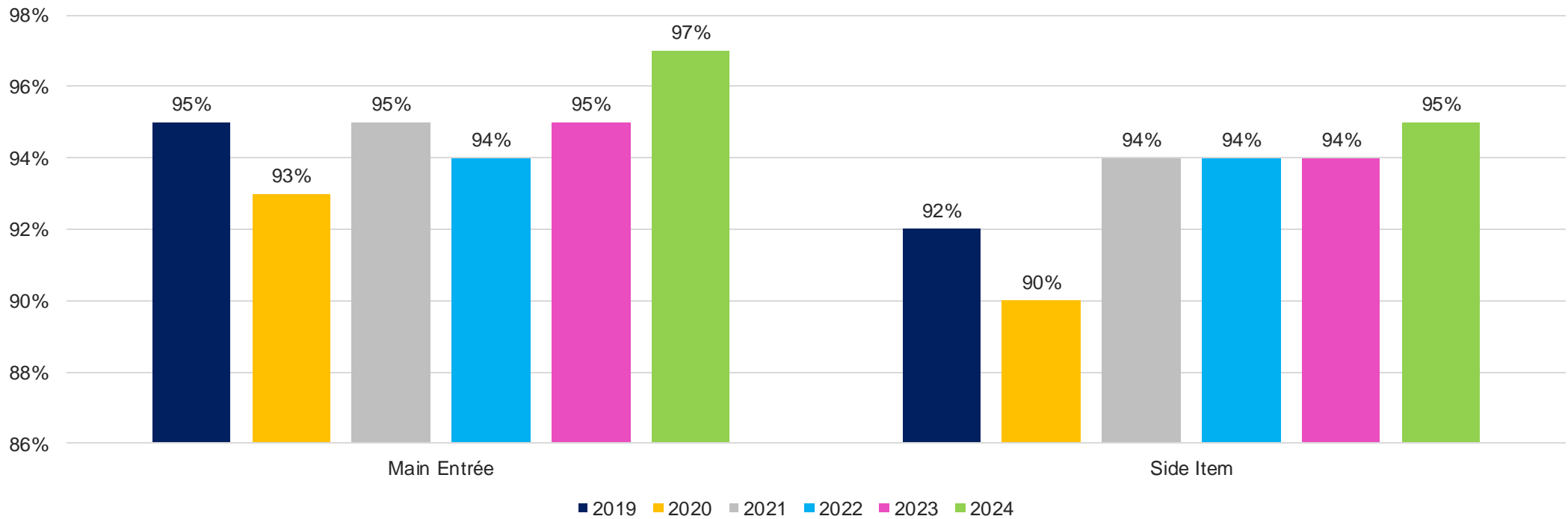


# Temperature

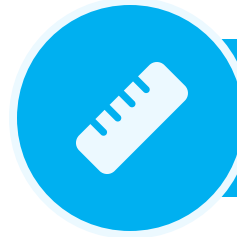


Temperature improved for both the main entrée and side item in 2024.

Temperature as Expected

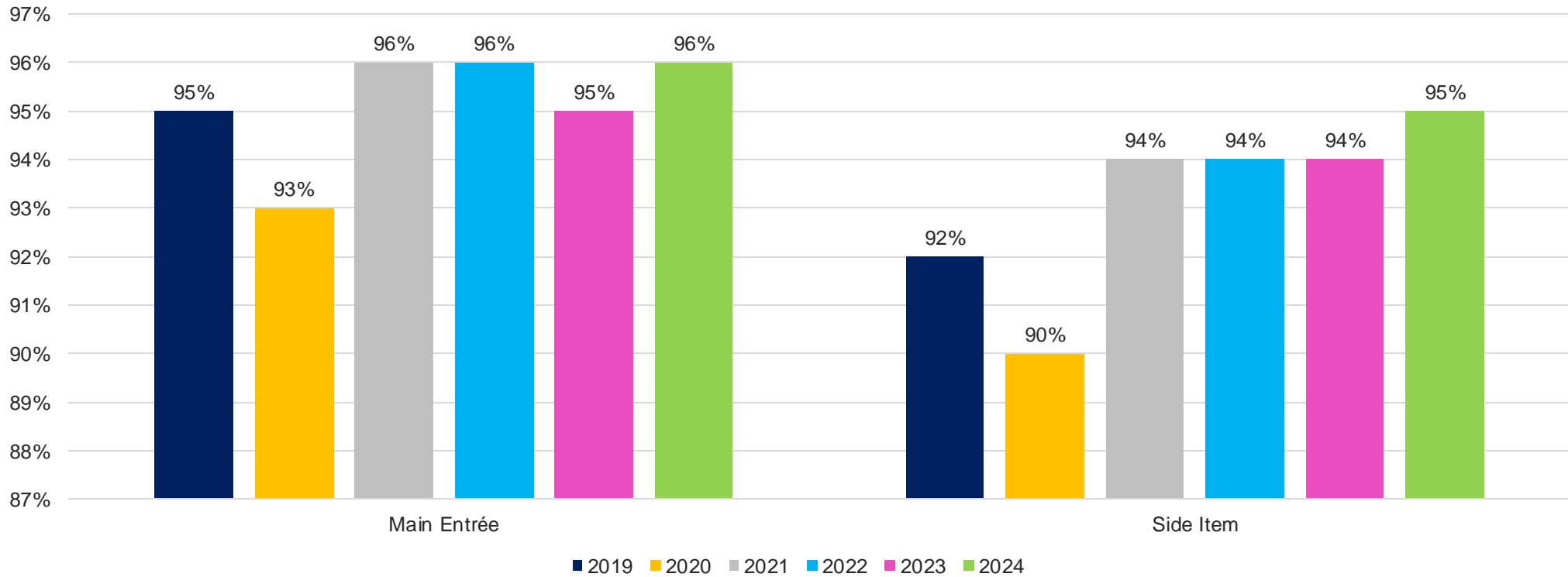


# Portion Size



The percentage of shoppers who said the portion size met their expectations increased by 1% for both the main entrée and side item in 2024.

**Portion as Expected**





# Satisfaction

Are your customers satisfied with all aspects of your service, and will they come back? Satisfaction is playing essential role in customer experience.

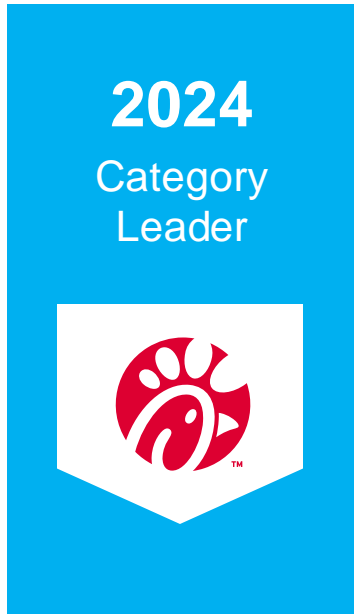
This year's data shows a notable improvement in total brand satisfaction, rising from 90% in 2023 to 94% in 2024. The data suggests that friendliness plays a significant role in overall satisfaction, with Chick-fil-A leading the way, achieving the highest satisfaction with the level of service and an impressive friendliness score of 95%.

Overall friendliness average for all brands increased from last year's 73% to 79% this year still leaving lots of room for improvement.





# Category Leaders: Satisfaction with Service



	2024	2023	2022
1	Chick-fil-A	Chick-fil-A	Chick-fil-A <span>Tied</span>
2	Raising Cane's	Taco Bell	Carl's Jr.
3	McDonald's	Arby's	Arby's <span>Tied</span>
4	Arby's <span>Tied</span>	Wendy's	Dunkin'
5	Taco Bell	Carl's Jr.	Hardee's

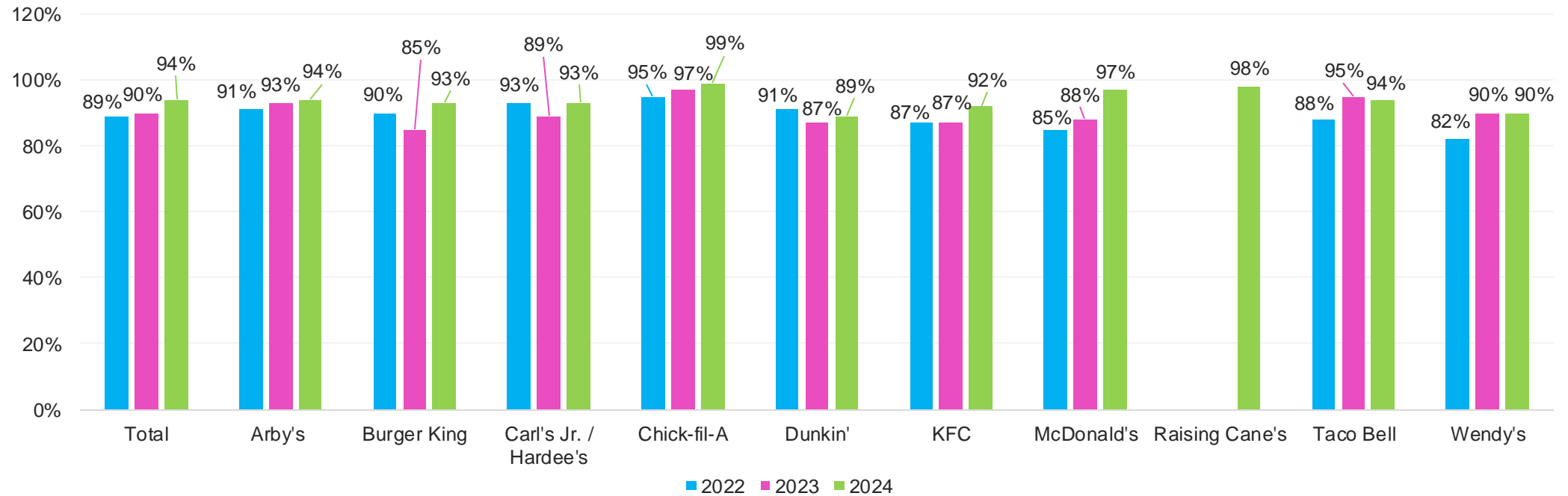
**Satisfaction with Level of Service** measures how satisfied shoppers were with the overall drive-thru experience, staff friendliness, and customer expectations regarding speed and experience.

# Satisfaction by Brand

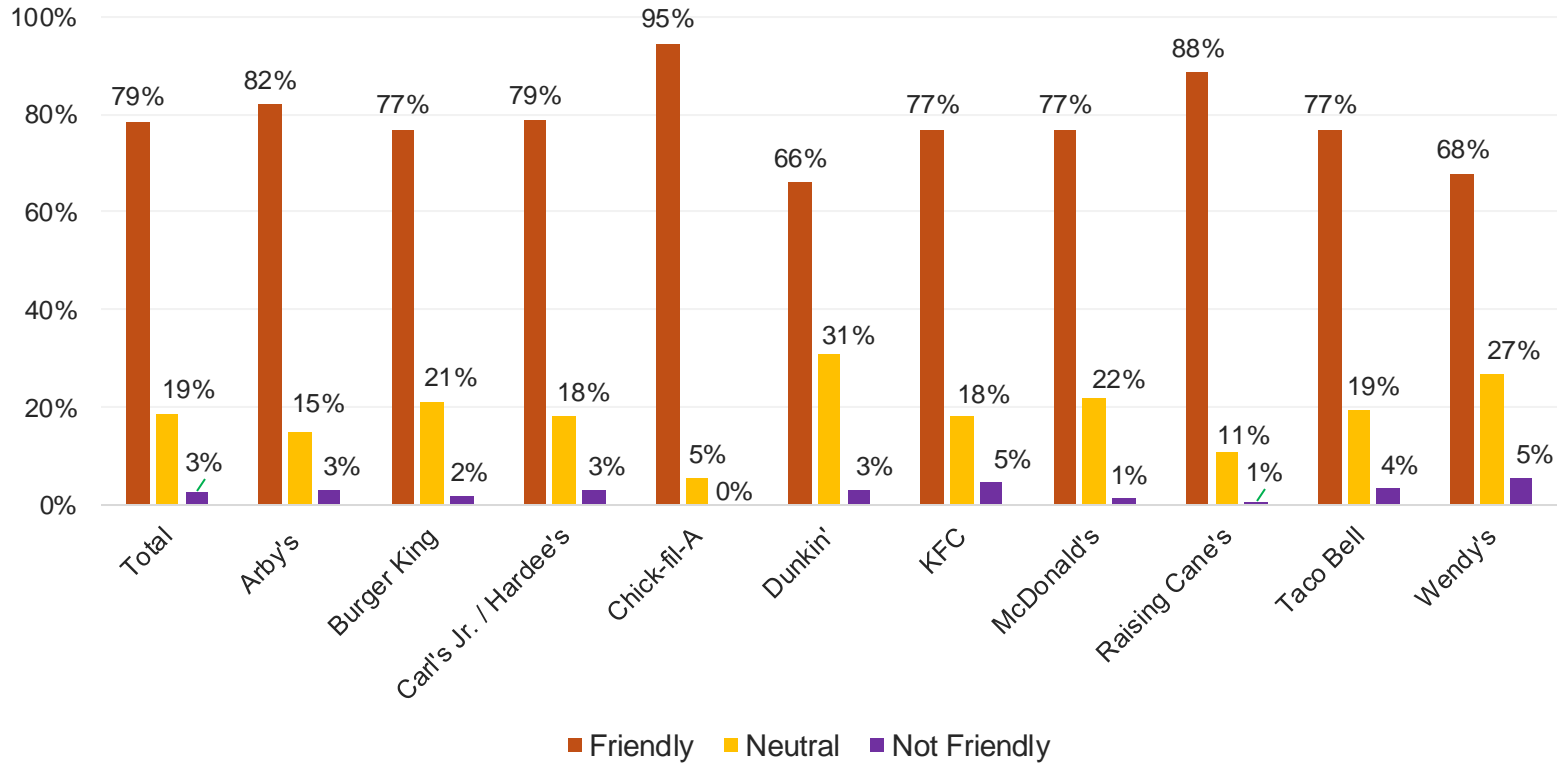


Only one brand saw a score decrease compared to last year.

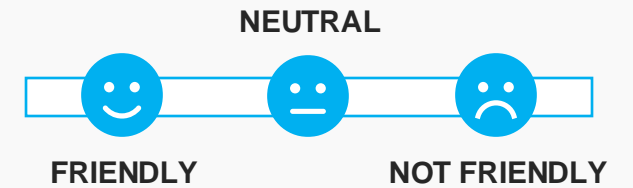
**Satisfaction with the Level of Service by Brand**



# Friendliness by Brand



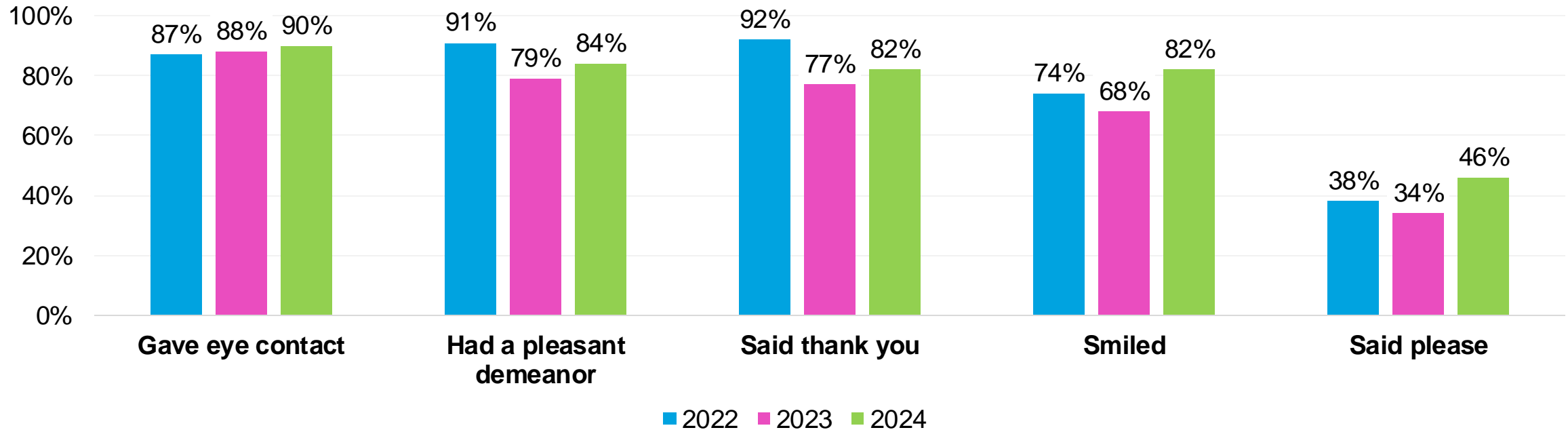
To measure friendliness, Shoppers were asked to rate the service received on the following scale:



# Friendliness Attributes



Friendliness scored 96% when the employee made eye contact, said please, said thank you, smiled, and had a pleasant demeanor.



# 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**:

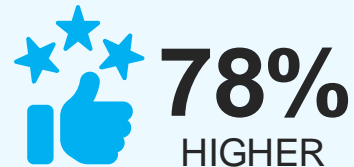
Total Time was



Order Accuracy was

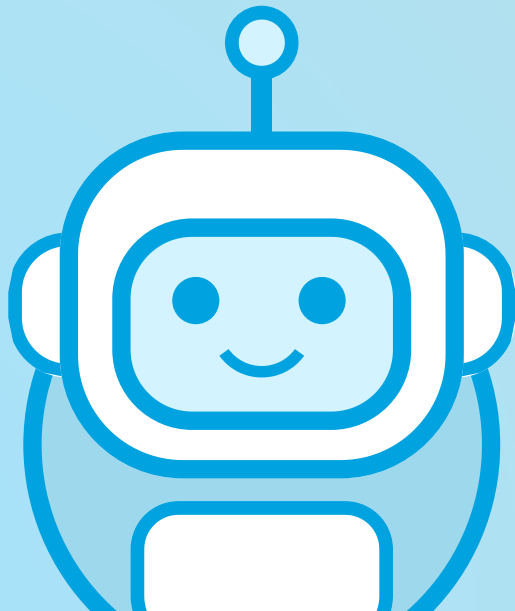


Satisfaction was



# Insights Into The Future: AI's role in improving drive-thru experiences.

While shoppers may not always fully recognize AI interactions, the data suggests that AI can positively impact overall satisfaction. Last year, our [technology-first innovation locations](#) also saw higher satisfaction scores, **indicating that technology and AI are contributing to an improved customer experience**. In this year's study, total satisfaction was 94%, rising to 98% when shoppers believed they were interacting with Voice-AI.



Did you know you were interacting with Voice-AI?	Overall Satisfaction
Yes	98%

# Unfriendliness Costs You

Based on an average meal cost of \$11.05, and a difference of 28 seconds between **friendly and not friendly orders**, annual losses due to inaccurate orders adds up.

<b>\$49,922.15</b>	<b>Potential loss per year per store unit</b>
\$99,844,300.00	Per 2000 locations
\$249,610,750.00	Per 5000 locations
\$499,221,500.00	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 other data points impact satisfaction and friendliness such as:

- 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

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# 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 order and receive 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.