INTOUCH INSIGHT

25th DRIVE-THRU STUDY

25th Anniversary Edition

Drive-Thru Study

In Partnership with: QSR

About Intouch

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.

For more information, visit www.intouchinsight.com.

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Introduction

Now in its 25th year, the Annual Drive-Thru Study is a mystery shopping study that evaluates brand performance and execution in the field. By timing and assessing each step of the drive-thru visit, the study benchmarks speed, accuracy, satisfaction, food quality, and suggestive selling.

This milestone edition expands to 13 leading QSR brands and includes a separate analysis of Voice AI–enabled drive-thrus. The report provides objective benchmarks and year-over-year trendlines, showing where execution is improving and where it falls short.

The 2025 QSR landscape is marked by a push for faster, smarter, tech-enabled drive-thrus amid labor pressures and rising guest expectations. In this context, new data cuts—such as the AI dataset and segmented results—offer decision-makers clearer visibility into performance across brands and formats.

About The Study

The 25th Annual Drive-Thru Study is based on **165 mystery shops per brand**, conducted across the United States between **June and July 2025**. Shoppers visited drive-thrus at various times of day and days of the week to capture a balanced view of performance in real-world conditions.

To make the insights more relevant for operators across the various segments, brands were grouped into three distinct categories based on their core offerings:

CLASSIC

Burger King, Taco Bell, Wendy's, Arby's, McDonald's

CHICKEN

Chick-fil-A, KFC, Raising Cane's Chicken Fingers, Popeyes Louisiana Kitchen

BEVERAGE

Dunkin', Starbucks, Tim Hortons, Dutch Bros Coffee

Metrics Tracked

1. Speed of Service
2. Order Accuracy
3. Satisfaction & Friendliness
4. Food Quality
5. Suggestive Selling

Daypart Breakdown

Breakfast (5:00am – 10:29am)	Lunch (10:30am – 1:30pm)	Afternoon (1:31pm – 4:00pm)	Dinner (4:01pm – 7:00pm)
8%	39%	12%	41%

Voice-AI in the Field

In addition to standard drive-thru evaluations, our shoppers conducted **40 mystery shops at three brands rolling out Voice-AI ordering**, for a total of **120 AI-enabled visits**. At these locations, the ordering process was handled by an AI voice assistant rather than a crew member.

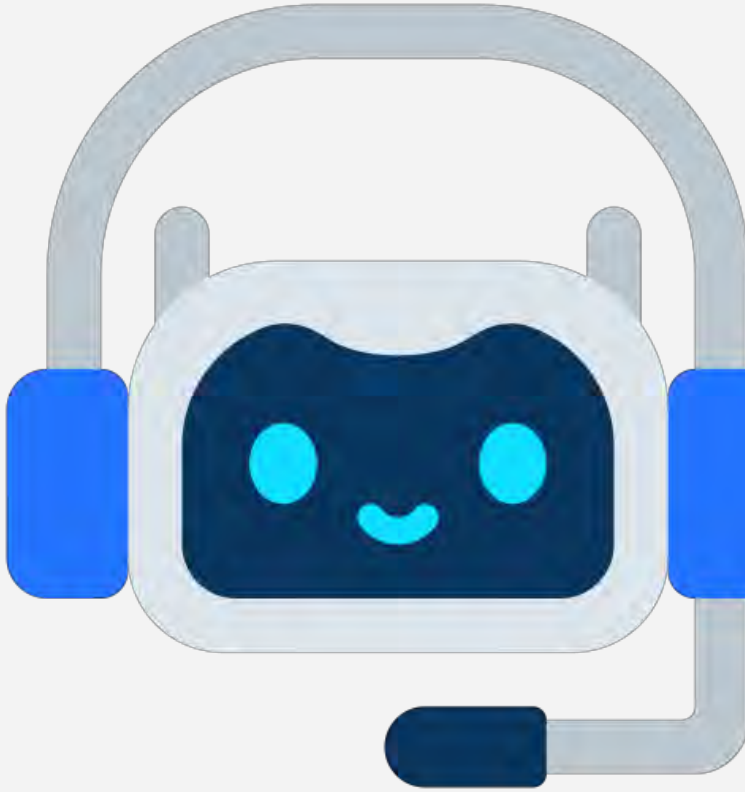
The same performance metrics, speed of service, accuracy, satisfaction, food quality, and suggestive selling—were tracked, allowing direct comparison between AI-driven and employee-driven orders.

Brands Visited

BURGER KING

TACO BELL

Wendy's



Want more drive-thru data?

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.

Curious about how your brand measures up? Become a Challenger Brand and find out!

For just $11,500 USD, you'll receive:

- Your Brand Data: 150 mystery shops conducted at your locations (price include food reimbursement).
- Full study data: Access your results alongside those of 13 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.

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Overall Study Results

Speed of Service | Order Accuracy | Food Quality | Suggestive Selling | Overall Satisfaction

SECTION 01

Speed of Service

All times are represented in a mm:ss format. For example, 5 minutes and 35 seconds is 5:35.

Speed of Service Avg. Time

5:35

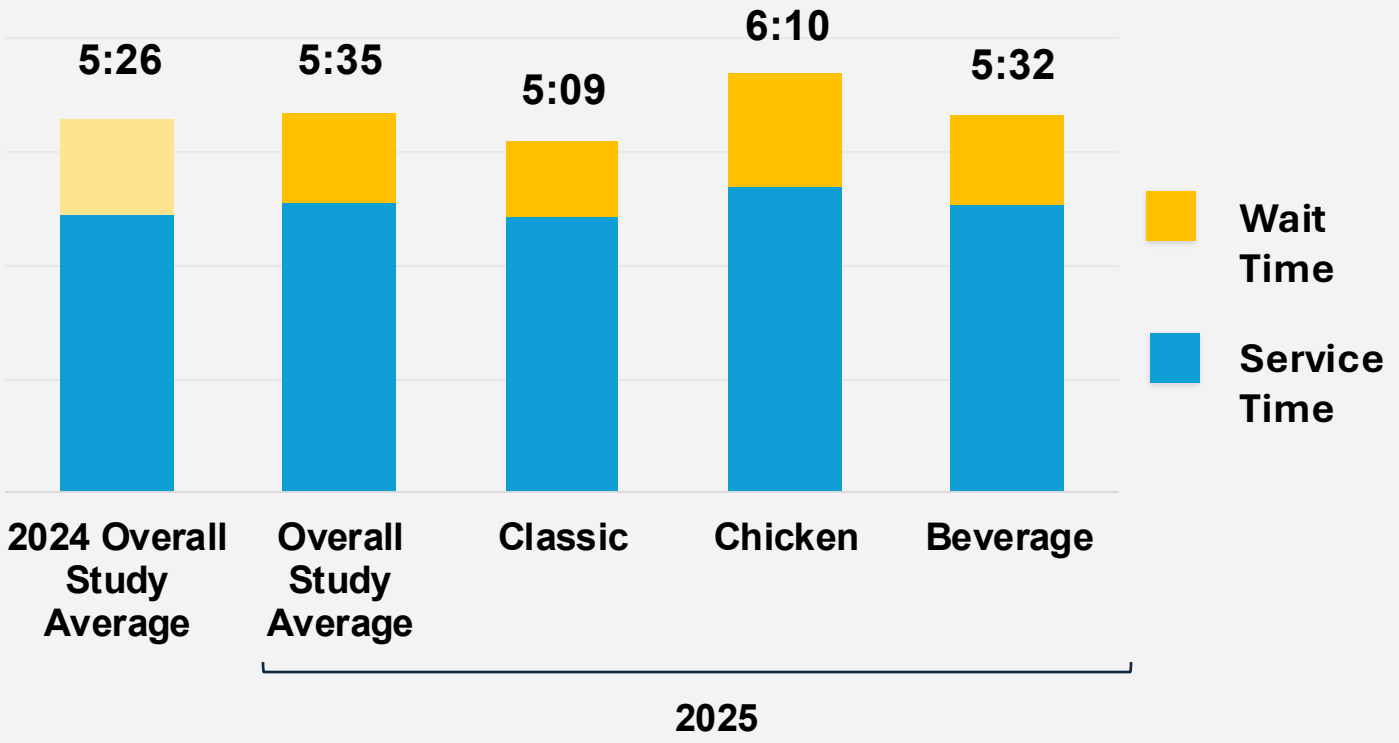
Segment Leaders

CLASSIC	CHICKEN	BEVERAGE
TACO BELL	KFC	Tim Hortons

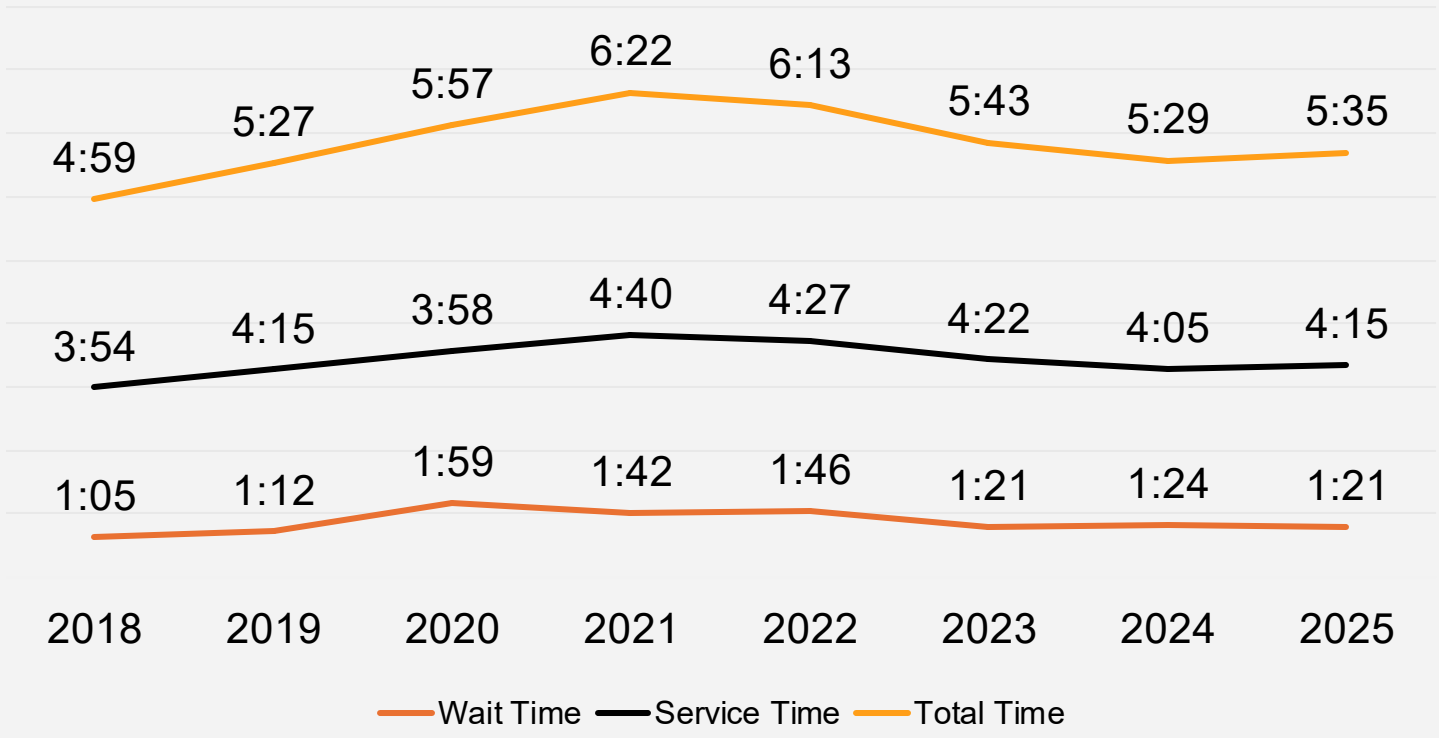
2025 Average Total Time 3 Seconds Faster vs. 2024

Overall, 2025 saw a slower overall drive-thru time than in 2024. However, when excluding the new brands added for 2025, the average total time is **3 seconds faster this year over last.**

**New brands are Popeyes, Dutch Bros, Starbucks, Tim Hortons.*



Speed Over Time

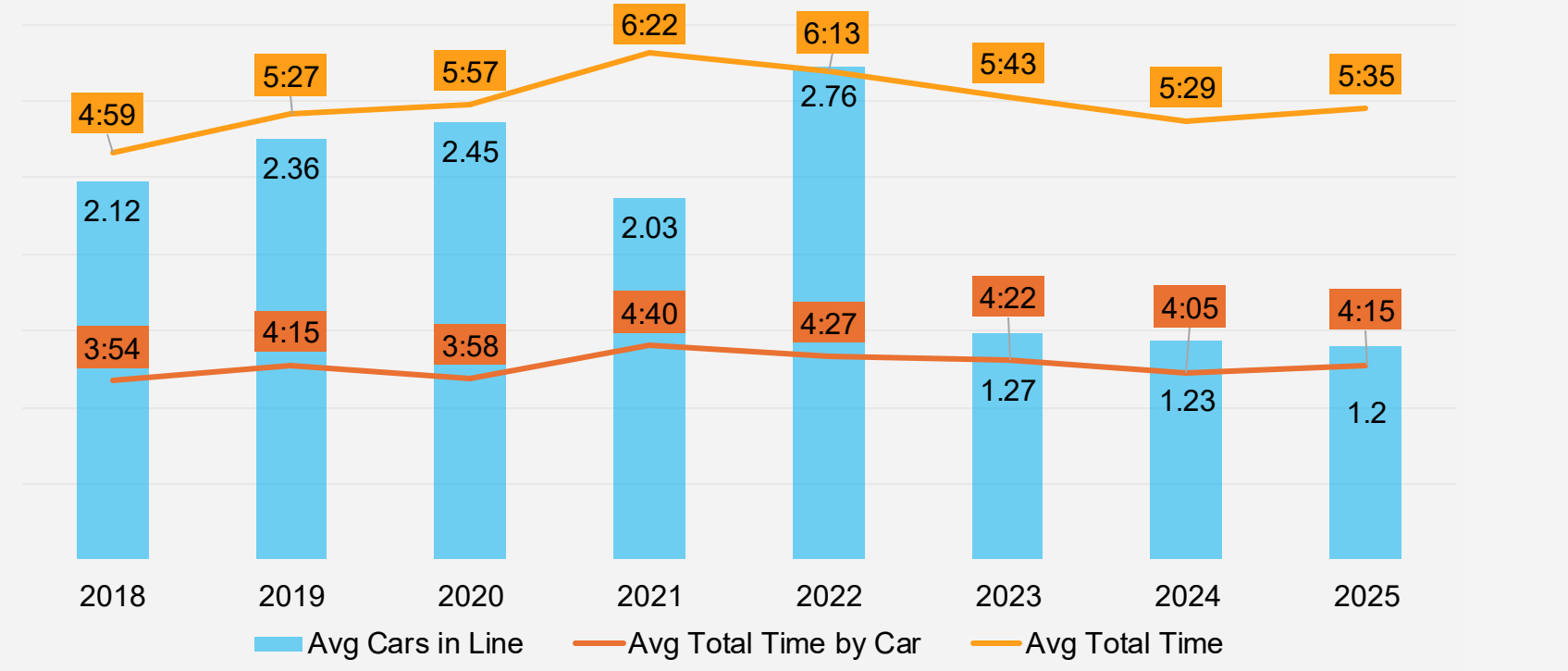


Year after year in this study, two of the factors with the biggest impacts on speed are speaker clarity, and customers not having to repeat their orders.

In 2025, good speaker clarity made interactions **54 seconds faster** on average, and customers who didn't need to repeat orders **saved an average of 1 minute and 25 seconds**.

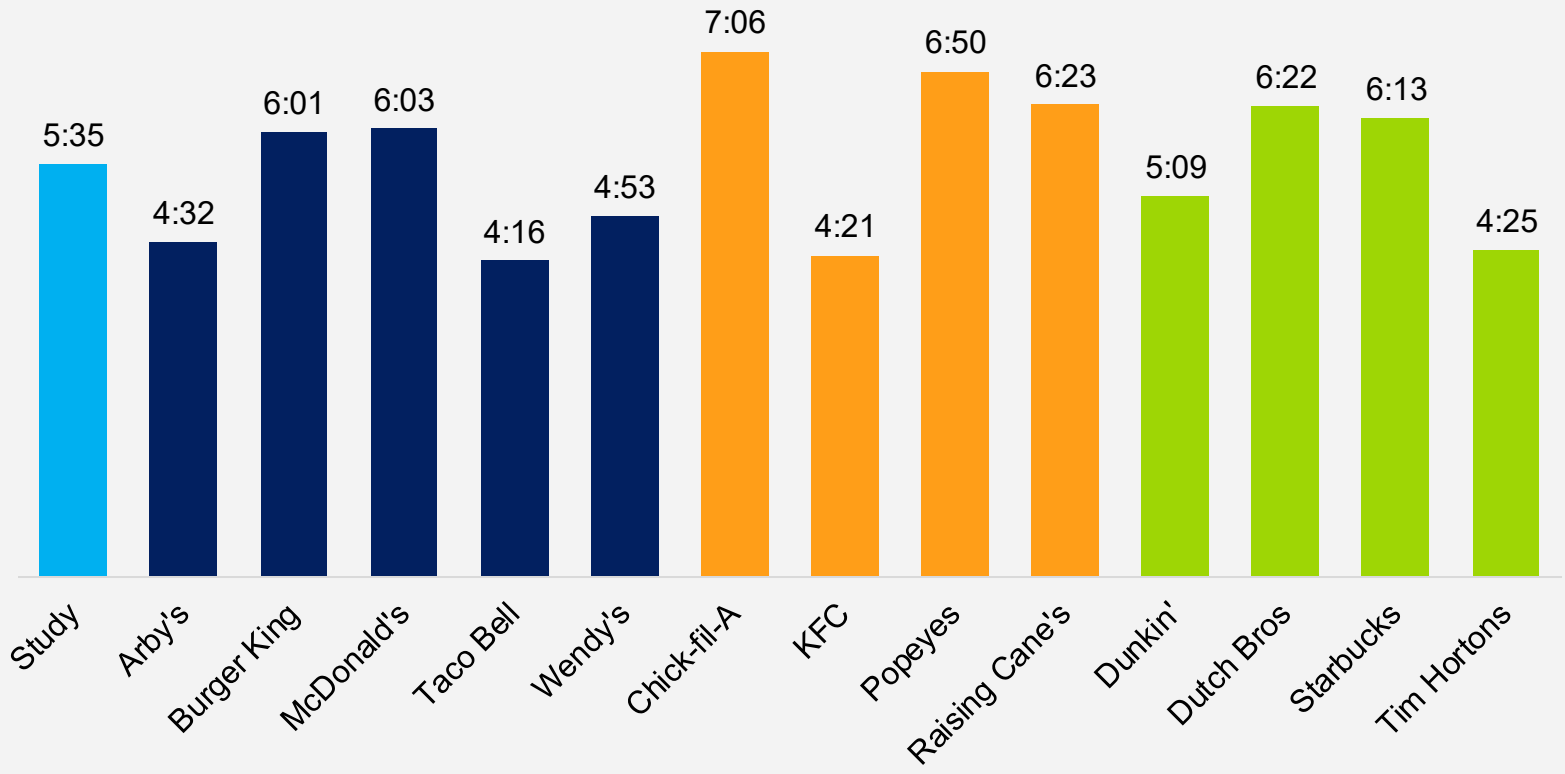
The Drive-Thru Evolution

The drive-thru has evolved from a channel for quick, simple orders into a digital fulfillment hub. While fewer cars line up today, each transaction is more complex—often involving mobile orders, app payments, and customizations. The challenge is no longer just speed, but balancing efficiency with the growing complexity of the modern drive-thru.



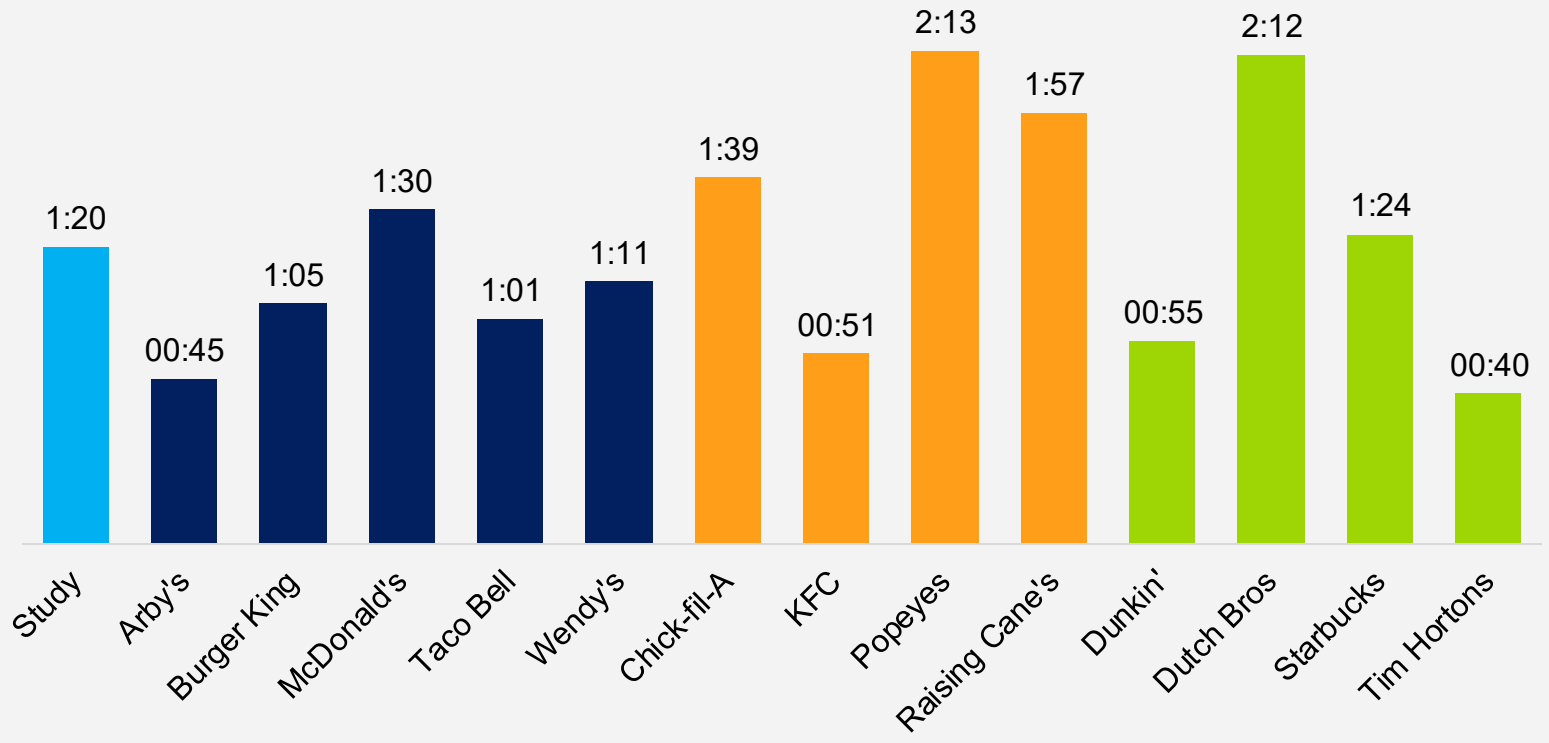
Speed of Service
Fastest Total Time by Brand

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.



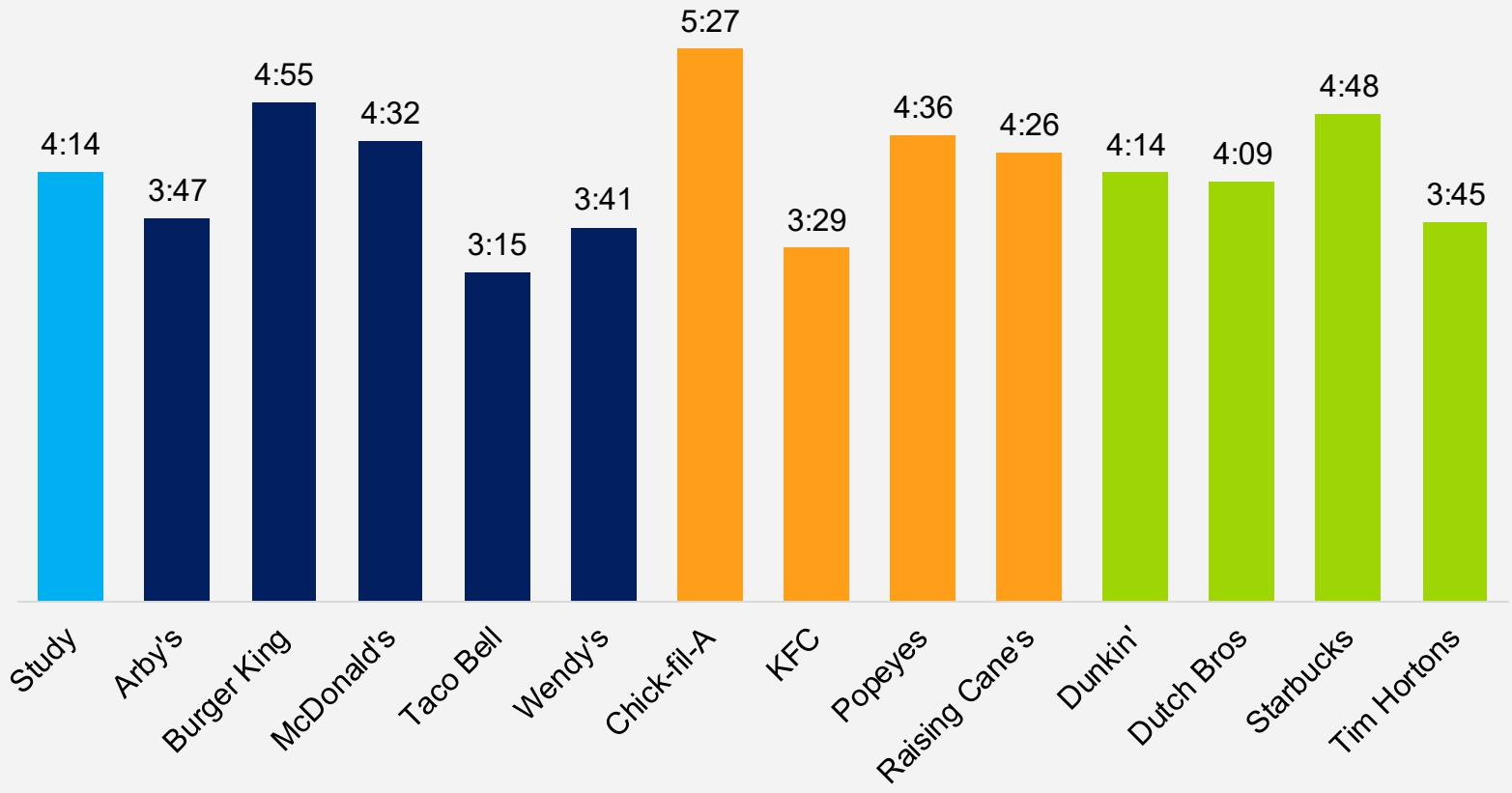
Speed of Service
Shortest Wait Time by Brand

Wait time is the amount of time from when the shopper entered the drive-thru to when they began placing their order.



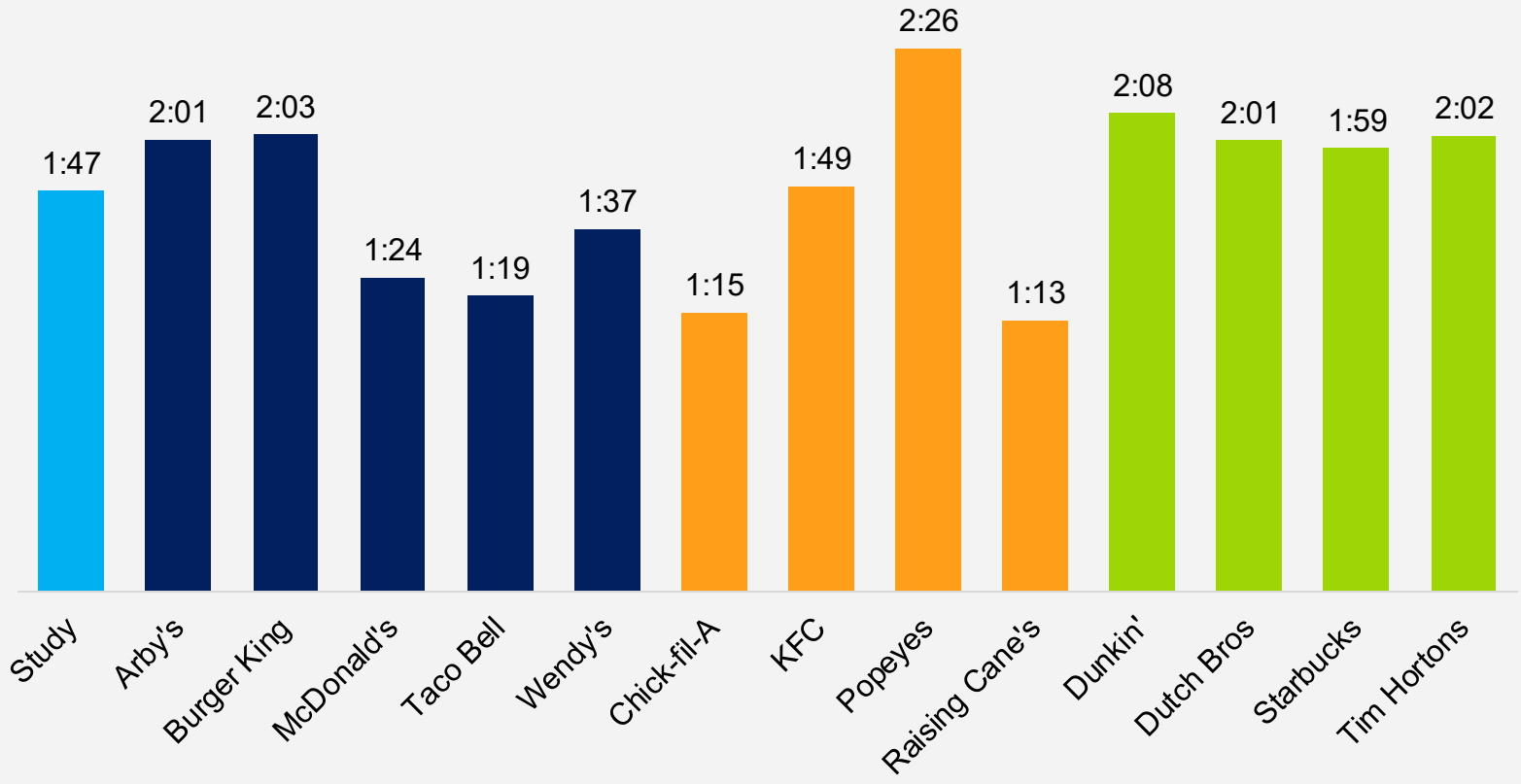
Speed of Service
Fastest Service Time by Brand

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



Speed of Service
Window Time by Brand

Window time is the amount of time passed from arriving at the food pickup window to receiving your entire order. For locations with only one station, window time includes the time spent placing the order.

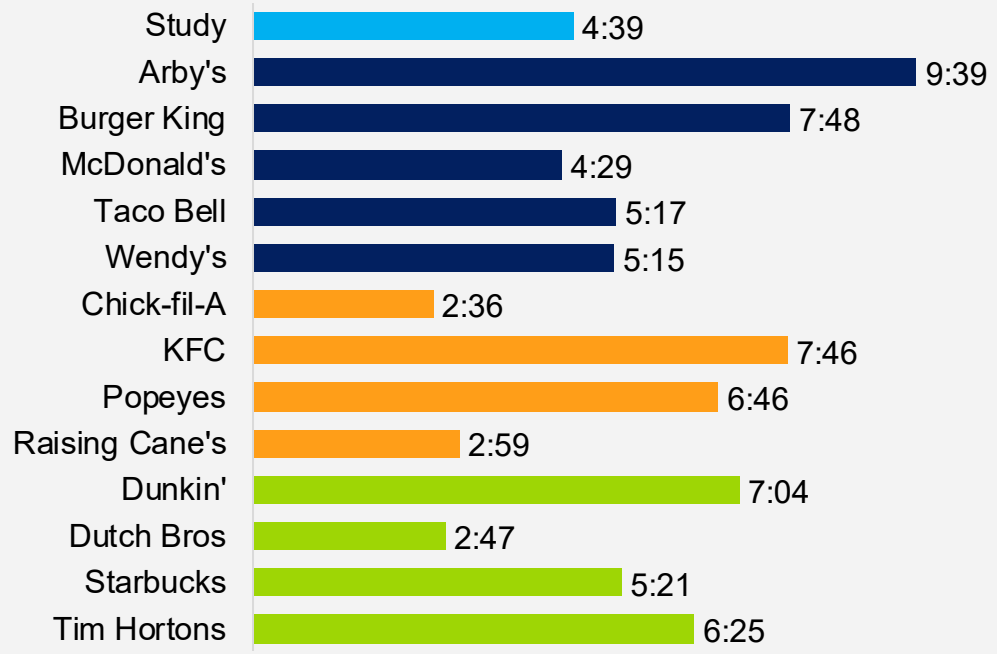


Speed of Service

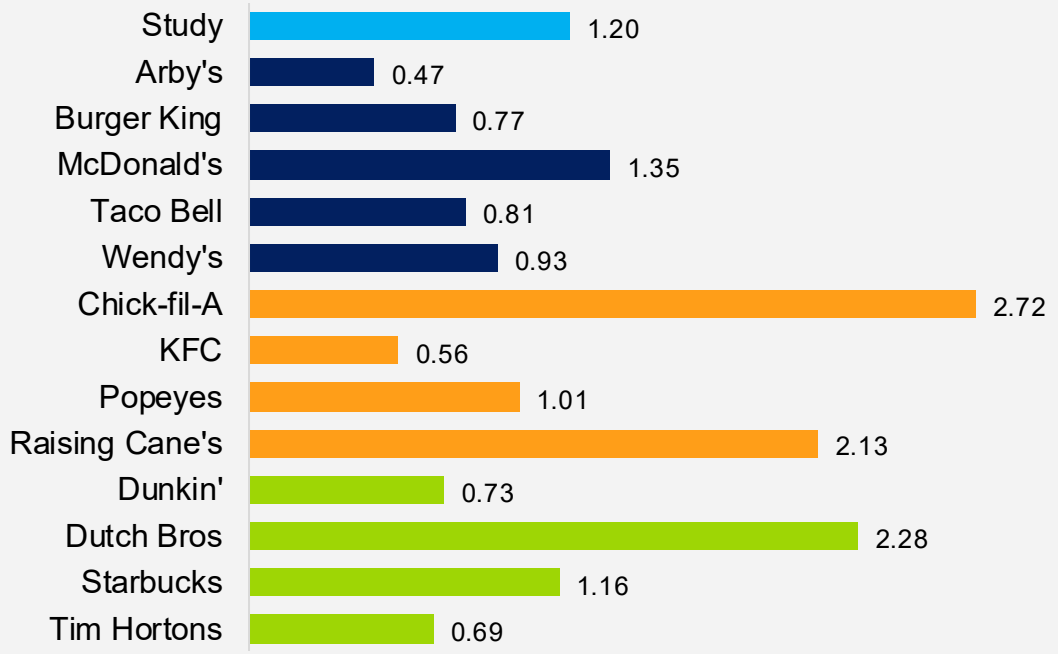
Fastest Total Time by Cars in Line by Brand

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.

Fastest Total Time by Cars in Line



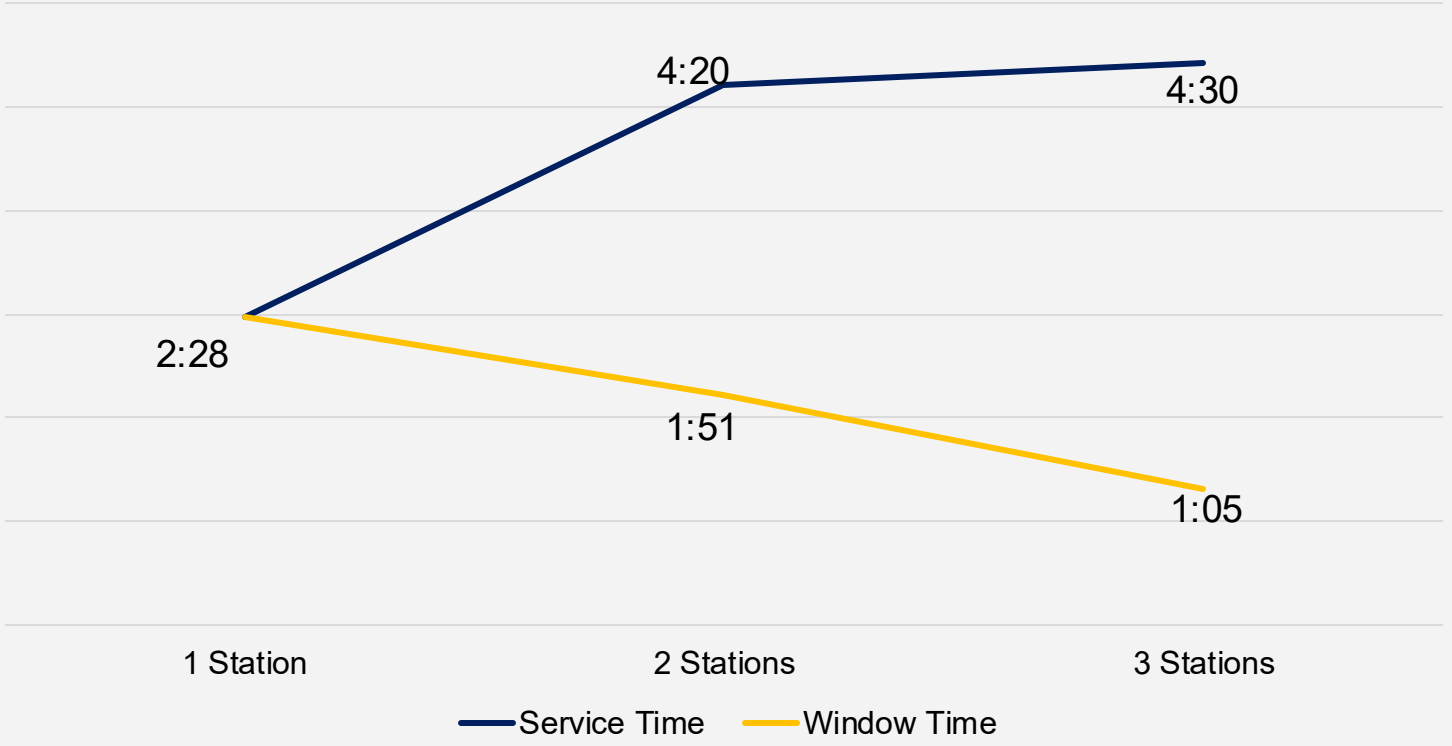
Total Cars in Line



Impact of Stations on Speed of Service

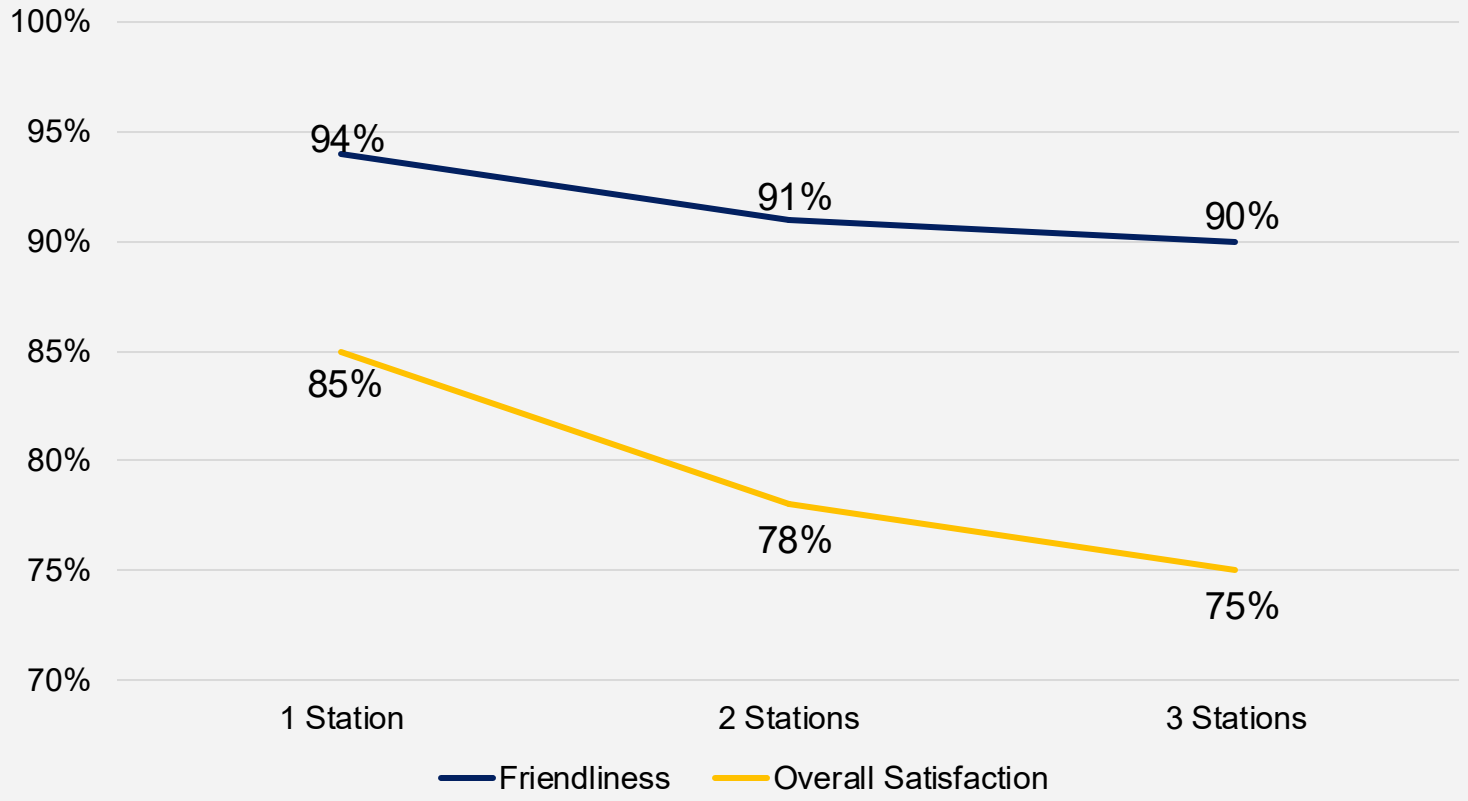
Stations are stops along the drive-thru such as windows/speakers/booths (i.e., where orders are taken, paid for, and picked up).
A restaurant may have one “station” that handles all three functions or many “stations” to handle each function.

The number of stations in use impacts service and window time differently. More stations ease pressure at the window and streamline handoff but extend overall service time.



Impact of Stations on Customer Experience

As the number of stations increased, friendliness and overall satisfaction declined.



SECTION 02

Order Accuracy

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

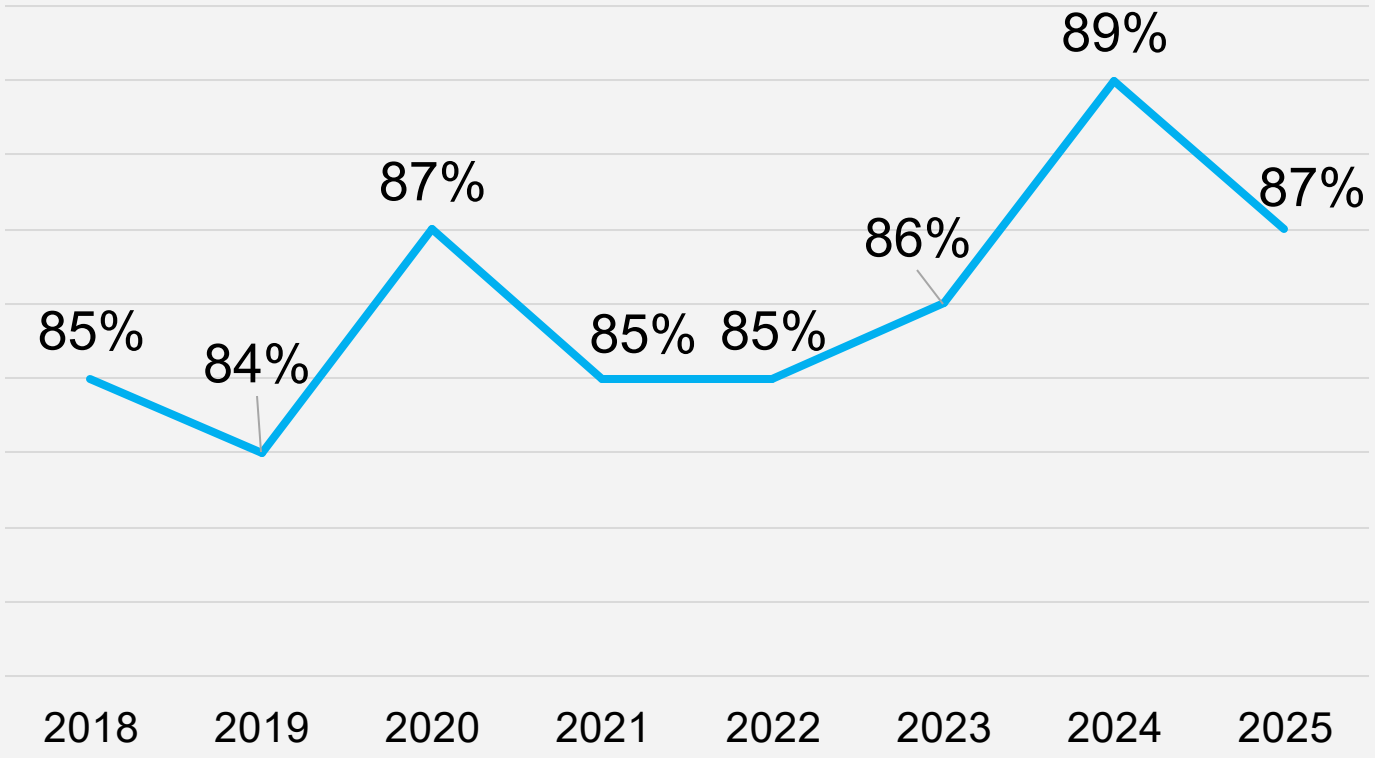
Order Accuracy Avg.

87%

Segment Leaders

CLASSIC	CHICKEN	BEVERAGE
Burger King, Wendy's	Chick-fil-A, Raising Cane's Chicken Fingers	Dutch Bros Coffee

Order Accuracy Trends Over Time



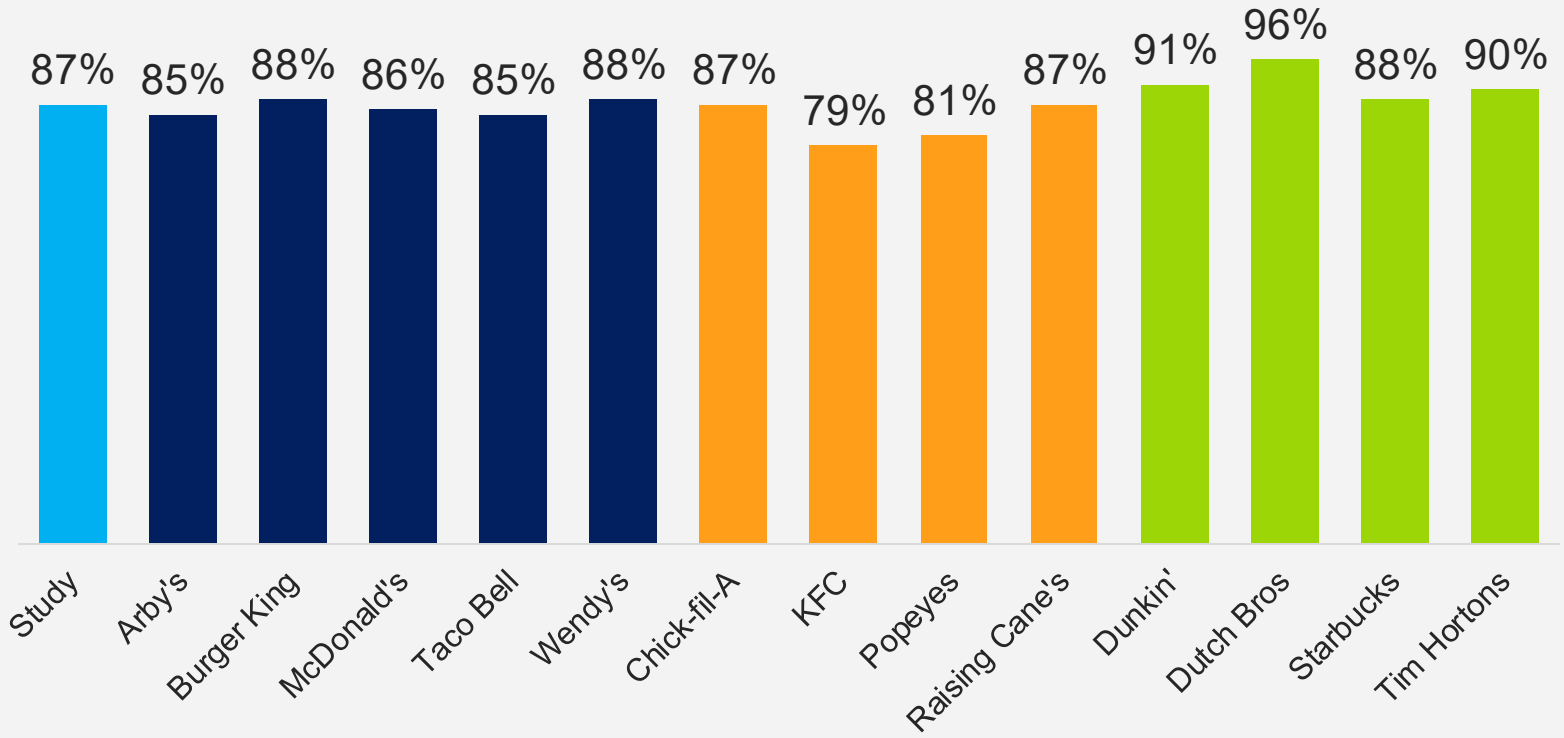
In 2025, Dinner scored the lowest for order accuracy at **86%**, while Afternoon scored the highest at **90%**.

Order Accuracy by Brand

What went wrong?

These are the top 2 reasons for inaccurate orders:

- Ice modifications — 51%
- Customer received the wrong item — 25%



SECTION 03

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).

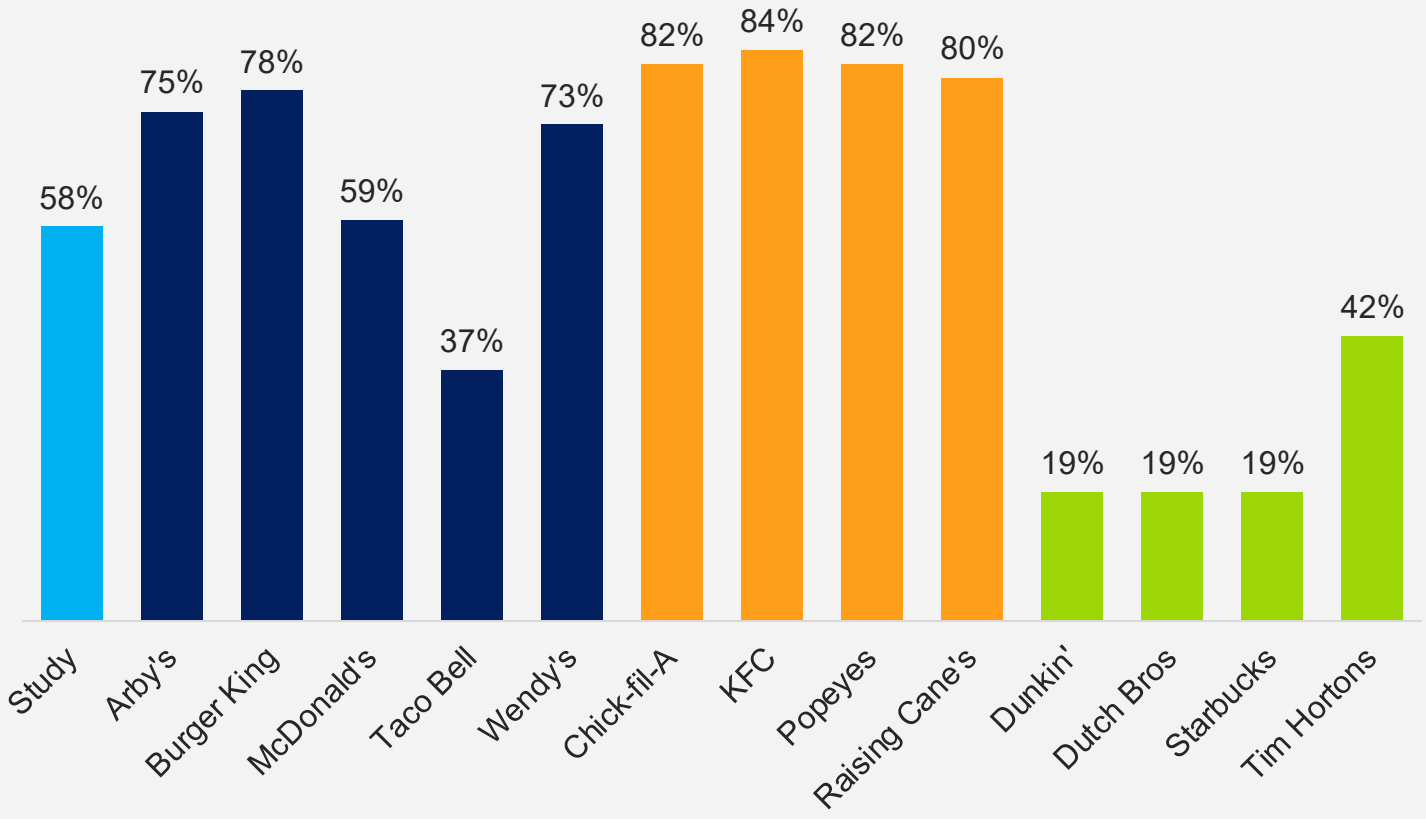
Suggestive Selling Avg.

58%

Segment Leaders

CLASSIC	CHICKEN	BEVERAGE
BURGER KING	KFC	Tim Hortons

Frequency of Suggestive Selling by Brand



Suggestive selling **improved speed of service**, but only when offered after placing the order.

	Total Time
Suggestive Sell Offered After Placing the Order	**5m 28 seconds**
Study Average	5m 35 seconds
Suggestive Sell Offered with Greeting	6m 04 seconds

SECTION 04

Food Quality

Food Quality metrics are measured based on the food and beverage items' taste and temperature being received as expected.

Food Quality Avg.

97%

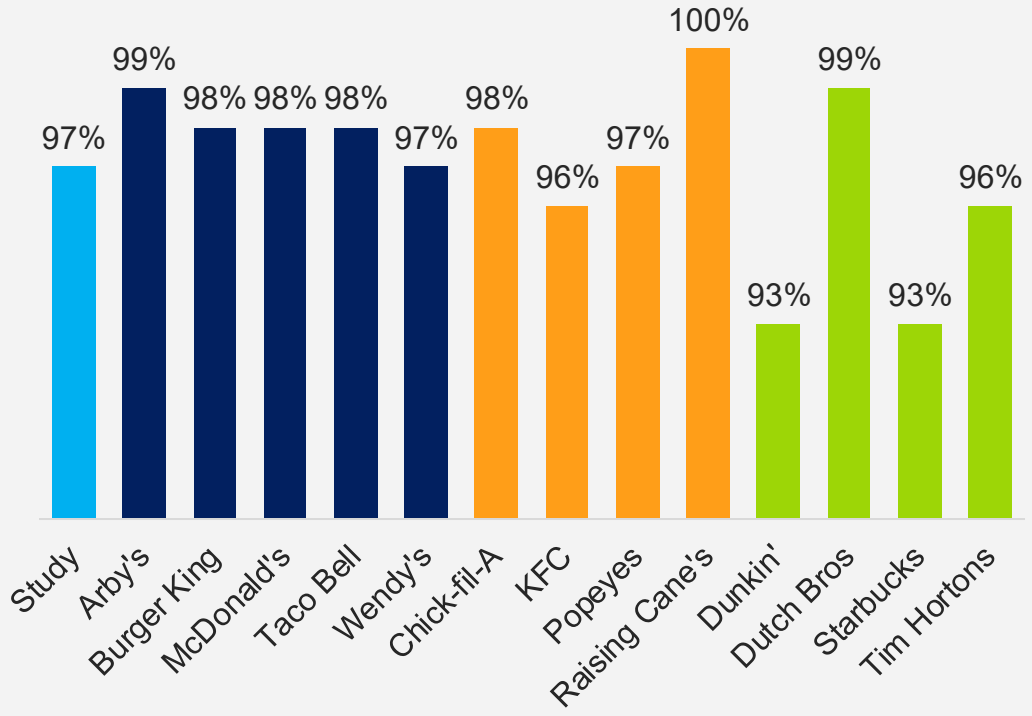
Segment Leaders

CLASSIC	CHICKEN	BEVERAGE
Arby's	Raising Cane's Chicken Fingers	Dutch Bros Coffee

Food Quality

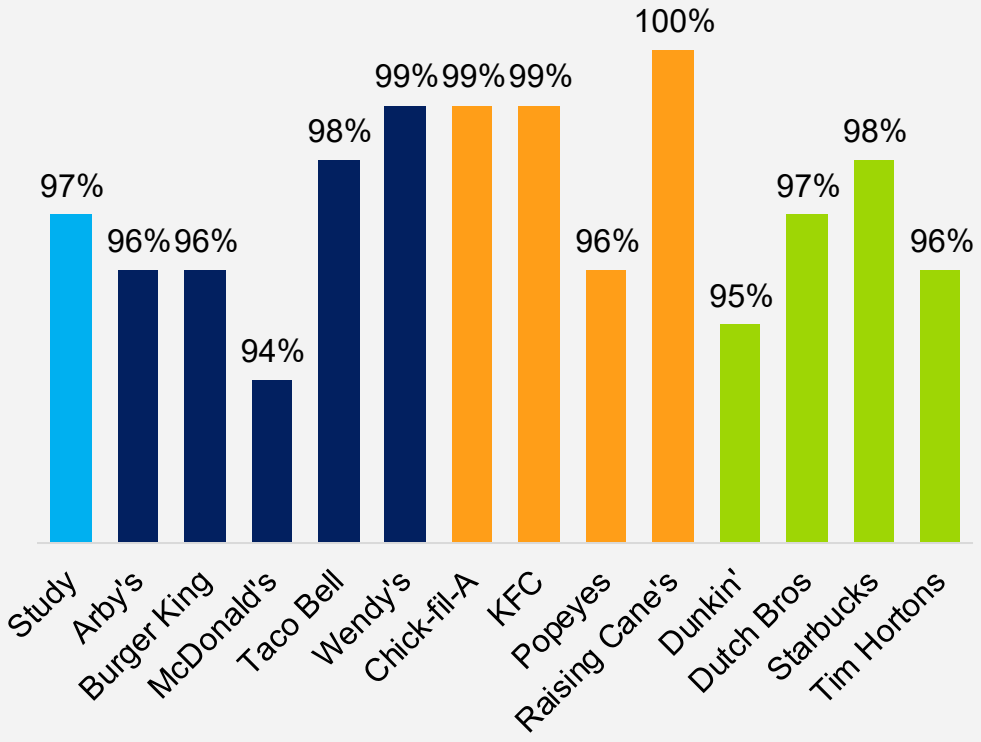
Main Item Taste by Brand

Food quality ranking based on whether or not the main entrée tasted as expected.



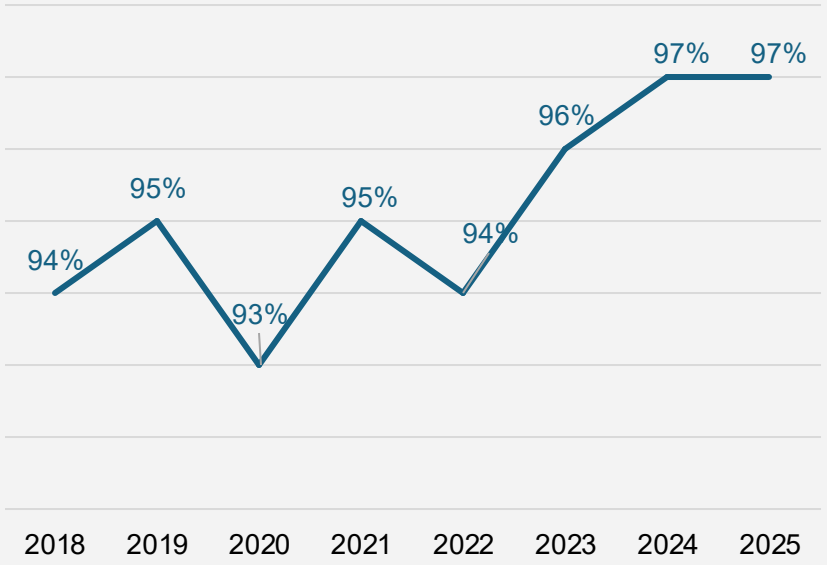
Main Item Temperature by Brand

Food quality ranking based on whether or not the main entrée temperature was as expected.

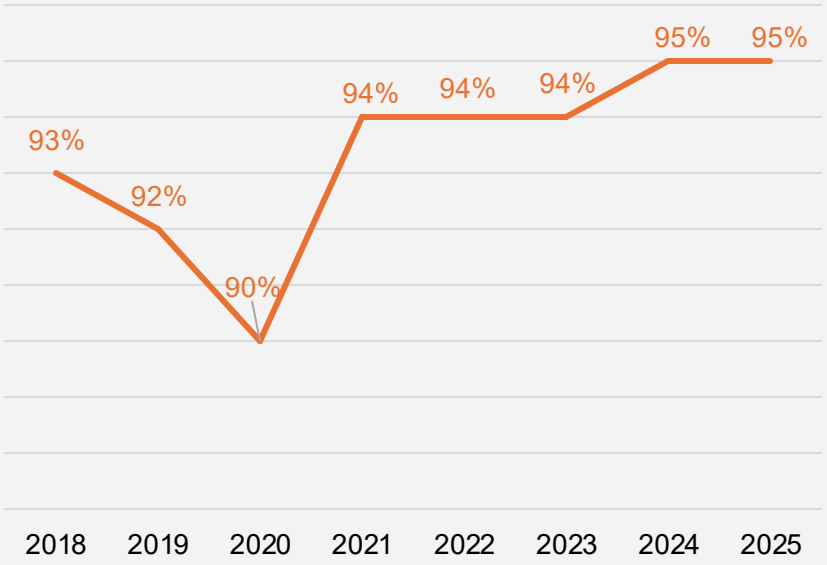


Food Quality Trends Over Time

Main Item Temperature



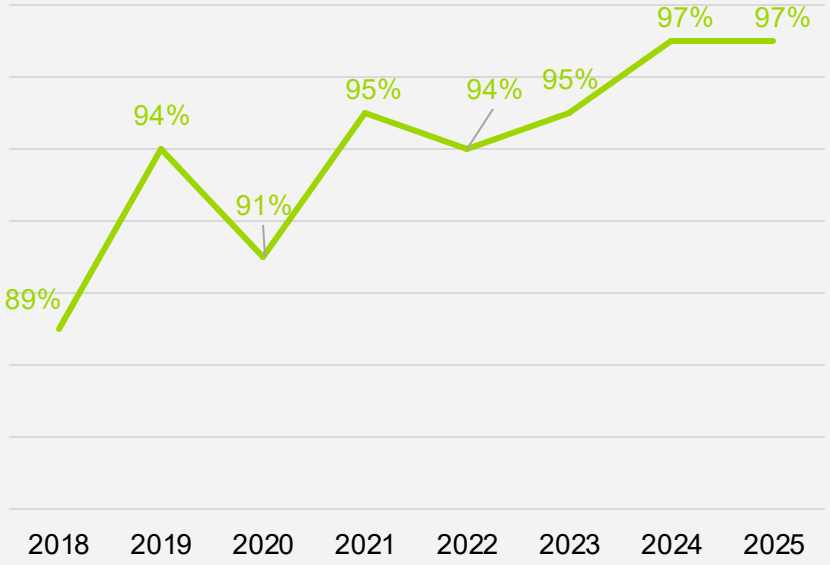
Side Item Temperature



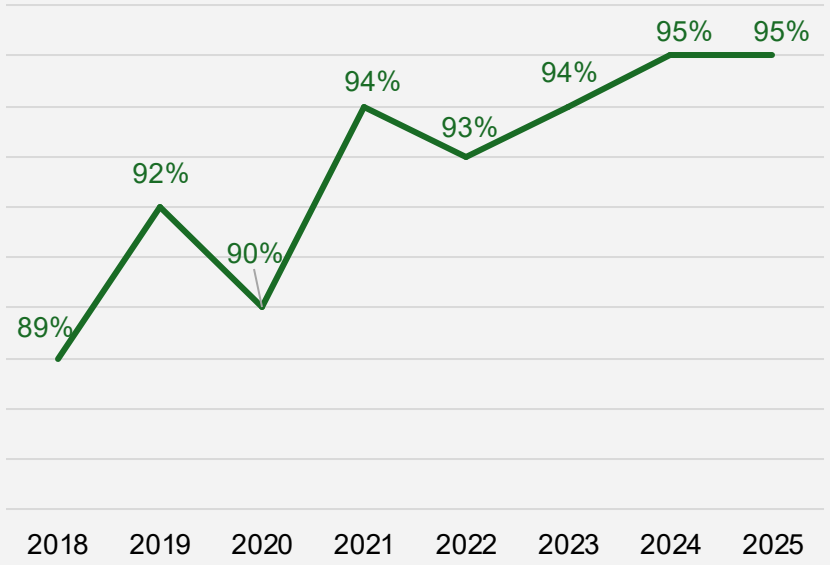
Side item temperature and taste received identical scores in 6 out of the last 8 years, highlighting a consistent link between how hot (or cold) an item is and how it's perceived in terms of taste.

Food Quality Trends Over Time

Main Item Taste



Side Item Taste



SECTION 05

Overall Satisfaction

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 Avg.

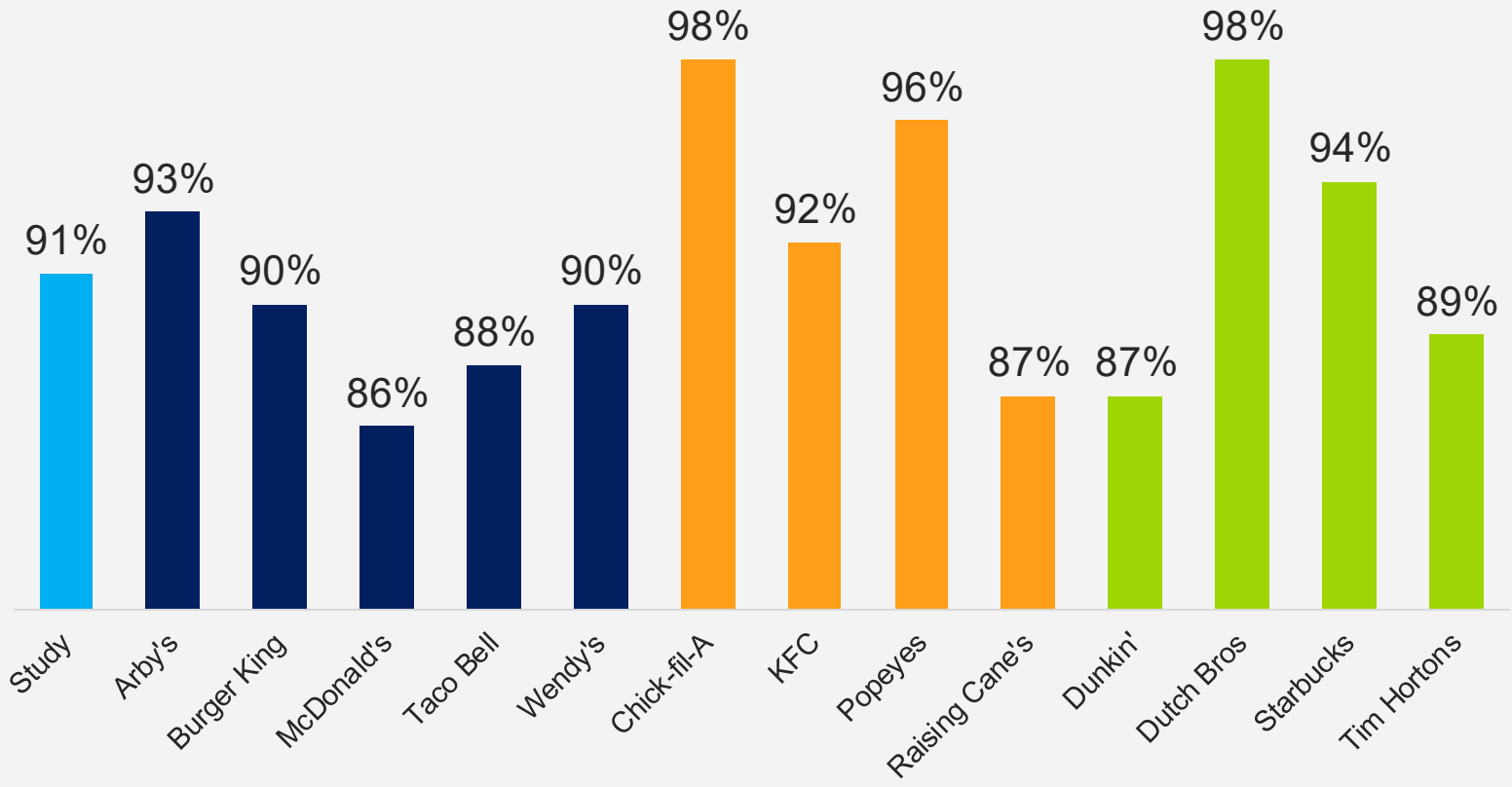
91%

Segment Leaders

CLASSIC	CHICKEN	BEVERAGE
Arby's	Chick-fil-A	Dutch Bros Coffee

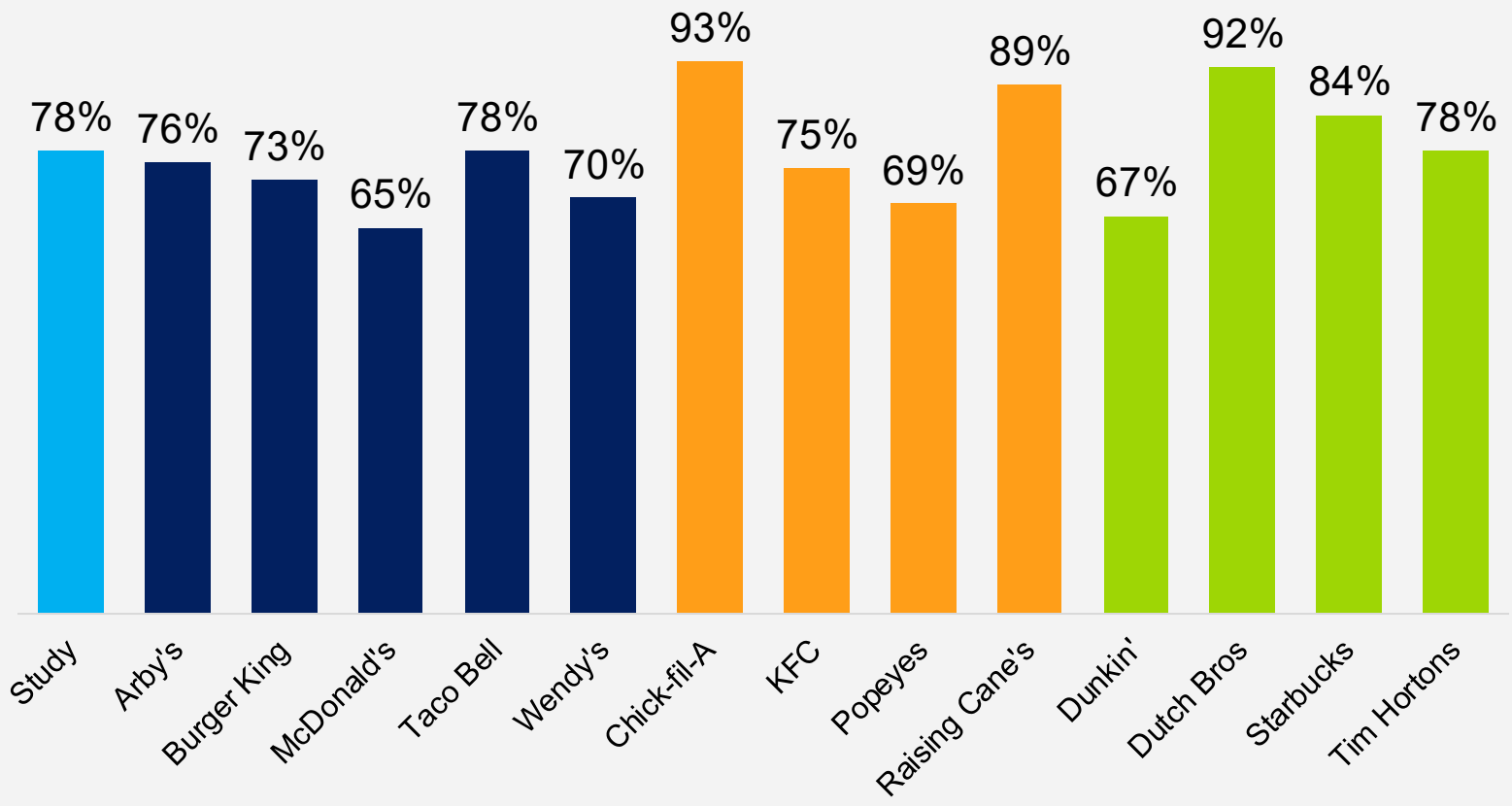
Overall Satisfaction by Brand

Accuracy and friendliness are the strongest drivers: getting the order right and interacting politely yield high satisfaction.



Friendliness by Brand

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



The score represents the percentage of shoppers who rated the service as friendly.

Friendliness is a Super-Driver

When service was friendly:

- **97% Overall Satisfaction**
- **89% Order Accuracy**
- **5 minutes, 23 seconds Total Time**

When service was not friendly:

- **22% Overall Satisfaction**
- **70% Order Accuracy**
- **6 minutes, 57 seconds Total Time**

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Segment Deep-Dive

Classic | Chicken | Beverage

Segment 1: Classic

The Classic segment proved to be a mixed bag in this year's study. They led the way with the fastest total time at 5:09 and earned the second-highest order accuracy at 87%. However, despite excelling in speed and accuracy, this segment struggled with the human element—scoring the lowest in friendliness (72%) and overall satisfaction (89%).

These results suggest that while efficiency is a strength, there's room to improve the customer experience beyond speed.

Performance Overview

Metric	Score
Speed of Service	5:09
Order Accuracy	87%
Satisfaction	89%
Food Quality	98%
Suggestive Selling	64%

2025 Speed Breakdown
Classic Segment

Time of Day	Average Cars in Line	Wait Time	Service Time	Total Time
Breakfast (5:00am - 10:29am	0.58	00:37	3:29	4:06
Lunch (10:30am - 1:30pm)	1.00	1:14	3:59	5:13
Afternoon (1:31pm - 4:00pm)	0.94	1:12	3:55	5:08
Dinner (4:01pm - 7:00pm)	0.78	1:05	4:15	5:20

Classic Segment Scoreboard

Metric	Arby's	Burger King	McDonald's	Taco Bell	Wendy's
Speed of Service	4:32	6:01	6:03	4:16	4:53
Order Accuracy	85%	88%	86%	85%	88%
Satisfaction	93%	90%	86%	88%	90%
Food Quality	99%	98%	98%	98%	97%
Suggestive Selling	75%	78%	59%	37%	73%

Segment 2: Chicken

The Chicken segment led the way in food quality, scoring the highest across all related metrics. They also ranked first in friendliness (82%) and overall satisfaction (93%). However, this performance was paired with the lowest order accuracy at 83%, as well as the slowest total time at 6:10 and the longest wait time at 1:40.

Performance Overview

Metric	Score
Speed of Service	6:10
Order Accuracy	83%
Satisfaction	93%
Food Quality	98%
Suggestive Selling	82%

2025 Speed Breakdown
Chicken Segment

Time of Day	Average Cars in Line	Wait Time	Service Time	Total Time
Breakfast (5:00am - 10:29am	**1.35**	**1:05**	**5:01**	**6:06**
Lunch (10:30am - 1:30pm)	**1.87**	**1:34**	**4:17**	**5:51**
Afternoon (1:31pm - 4:00pm)	**1.67**	**1:57**	**4:58**	**6:55**
Dinner (4:01pm - 7:00pm)	**1.35**	**1:44**	**4:33**	**6:17**

Chicken Segment Scoreboard

Metric	Chick-fil-A	KFC	Popeyes	Raising Cane's
Speed of Service	7:06	4:21	6:50	6:23
Order Accuracy	87%	79%	81%	87%
Satisfaction	98%	92%	96%	87%
Food Quality	98%	96%	97%	100%
Suggestive Selling	82%	84%	82%	80%

Segment 3: Beverage

The Beverage segment earned the highest marks in order accuracy, outperforming Chicken brands by 8%. They also placed second in speed, with a total time of 5:32. With friendliness at 80% and overall satisfaction at 92%, Beverage brands balanced efficiency with a positive guest experience.

Performance Overview

Metric	Score
Speed of Service	5:32
Order Accuracy	91%
Satisfaction	92%
Food Quality	95%
Suggestive Selling	25%

2025 Speed Breakdown
Beverage Segment

Time of Day	Average Cars in Line	Wait Time	Service Time	Total Time
Breakfast (5:00am - 10:29am	**1.93**	**1:34**	**3:44**	**5:18**
Lunch (10:30am - 1:30pm)	**1.49**	**1:25**	**4:06**	**5:31**
Afternoon (1:31pm - 4:00pm)	**1.08**	**1:17**	**4:31**	**5:48**
Dinner (4:01pm - 7:00pm)	**0.79**	**1:08**	**4:26**	**5:34**

Beverage Segment Scoreboard

Metric	Dunkin'	Dutch Bros	Starbucks	Tim Hortons
Speed of Service	5:09	6:22	6:13	4:25
Order Accuracy	91%	96%	88%	90%
Satisfaction	87%	98%	94%	89%
Food Quality	93%	99%	93%	96%
Beverage Quality	96%	98%	95%	96%
Suggestive Selling	19%	19%	19%	42%

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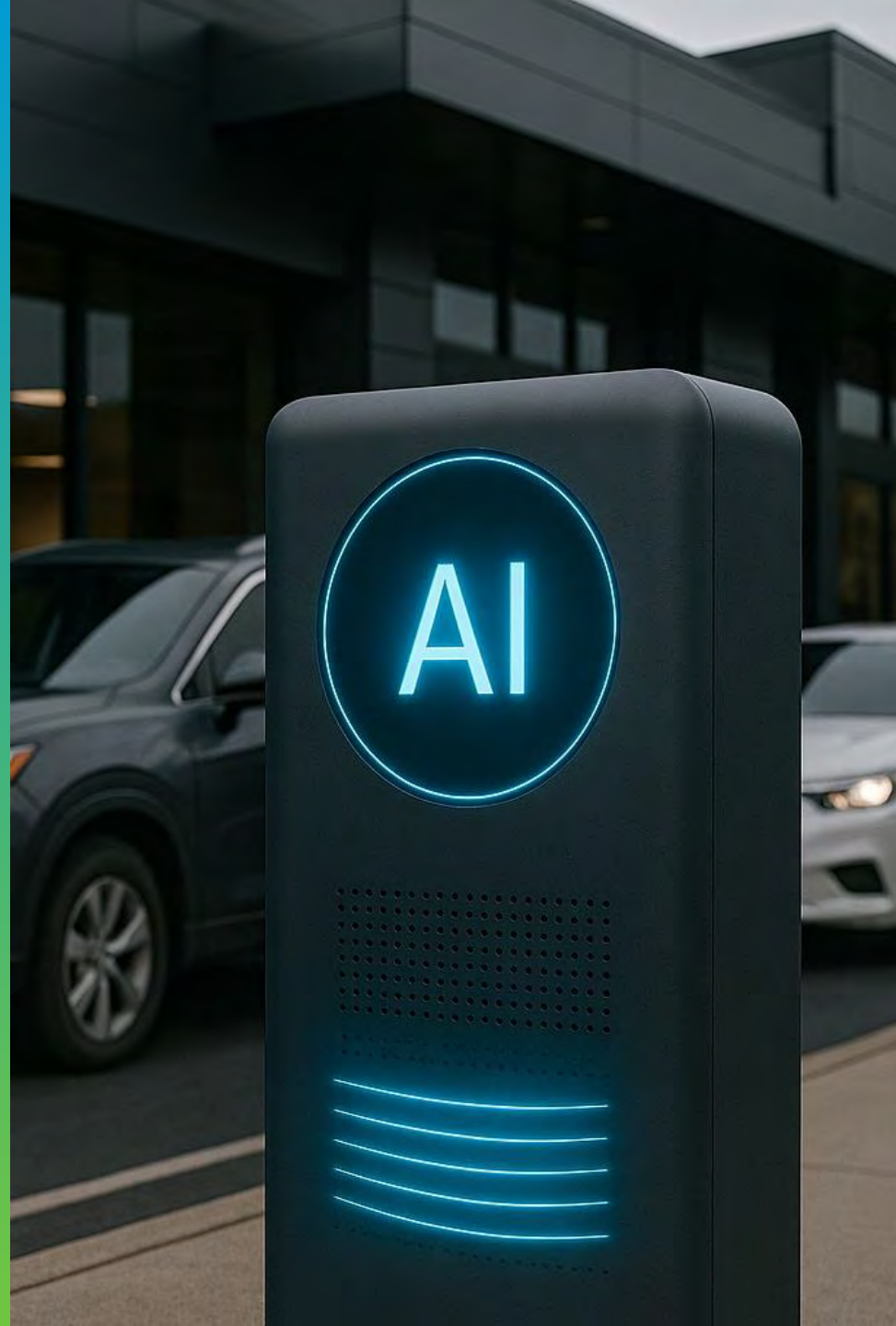
Voice-AI Findings

Performance Breakdown



Voice-AI Ordering

Artificial Intelligence is no longer a futuristic concept for restaurants—it is here, reshaping the way customers interact with the drive-thru. Early pilots began appearing in the QSR industry just a few years ago, with brands experimenting to see how automation could reduce labor costs, improve speed, and enhance consistency. Today, QSRs across North America are actively testing AI-powered prototypes to better understand how the technology performs in real-world conditions.

In addition to standard drive-thru evaluations, our 2025 study included **120 AI-enabled visits across three QSRs piloting Voice AI ordering**. At these locations, the ordering process was managed by an AI voice assistant rather than a crew member. The same performance metrics—speed of service, accuracy, satisfaction, food quality, and suggestive selling—were tracked, enabling a direct comparison between AI-driven and employee-driven orders.

Brands Visited

BURGER KING

TACO BELL

Wendy's

AI-Voice Ordering:
Speed and Efficiency

When it comes to efficiency, AI-powered drive-thrus demonstrate a clear advantage. Customers at AI locations experienced noticeably faster service times, shaving an average of 21 seconds off the process compared to traditional drive-thrus. Speaker clarity was also higher, helping streamline communication.

Metric	Voice-AI Locations	Study Average
Service Time	3m 53s	4m 15s
Speaker Clarity	98%	93%
Suggestive Selling	71%	58%
Main Item Temperature as Expected	99%	97%
Had to Repeat Order	34%	22%

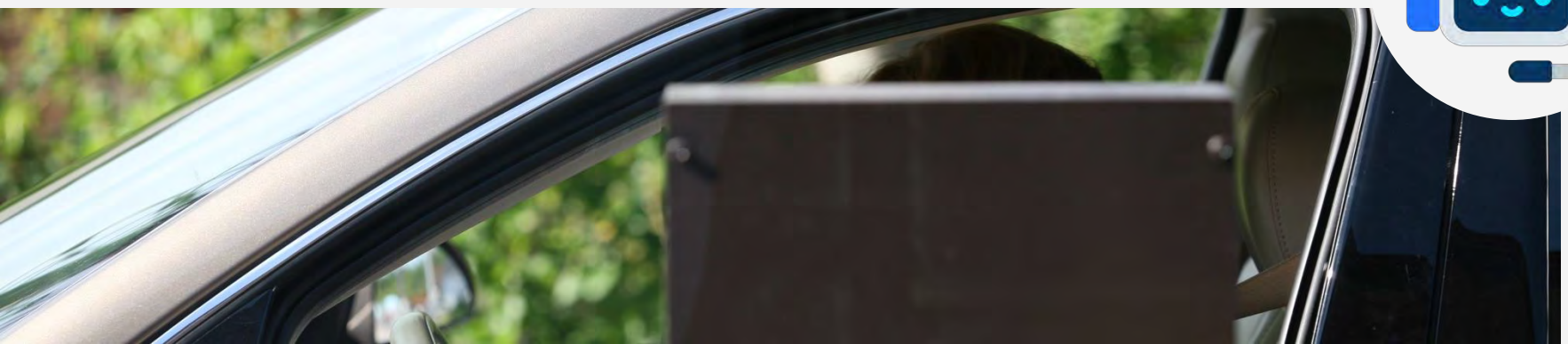
However, the data reveals a trade-off—while audio quality improved, customers were more likely to repeat their orders at AI locations, suggesting that comprehension challenges remain.

The AI Paradox: Satisfaction Despite Shortcomings

Despite lower friendliness (72% vs. 78%) and order accuracy (83% vs. 87%), customers reported **higher overall satisfaction at AI locations (97% vs. 91%)**.

The gains in speed and efficiency appear to outweigh service shortcomings, suggesting that customers are increasingly valuing convenience and speed as top priorities. And let's be honest—there's also an element of novelty at play. For many guests, interacting with AI feels new and exciting, which can positively influence how they perceive the overall experience, even when the service isn't perfect.

Metric	Voice-AI Locations	Study Average
Overall Friendliness	72%	78%
Order Accuracy	83%	87%
Overall Satisfaction	**97%**	**91%**



Human Intervention as a Safety Net

AI's greatest weakness today lies in customization. **62% of incorrect AI orders were due to customization issues**, such as modifications or special requests.

AI Interaction	Frequency*	Order Accuracy	Friendliness	Overall Satisfaction
AI took my entire order	72%	81%	72%	97%
AI began taking my order but was transferred to an employee	21%	95%	73%	95%
Overall Study		**87%**	**78%**	**91%**

In about 21% of AI orders, employees stepped in—most often because the AI could not handle a customization, answer a question, or process an unavailable item. When employees did step in, order accuracy jumped to 95%, compared to 81% when AI handled the order on its own.

This shows that while AI can drive efficiency, **human employees remain essential** in ensuring accuracy for complex or nuanced orders.

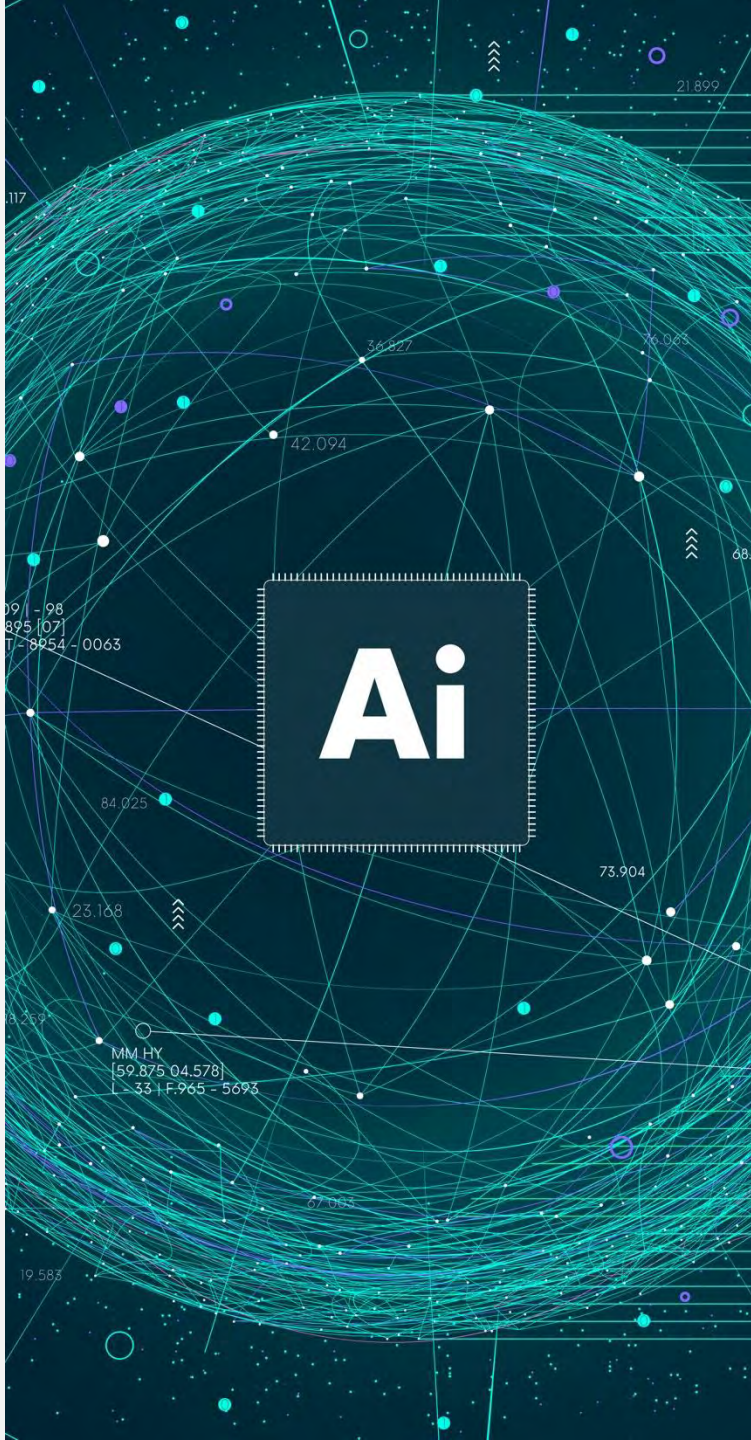
* *"AI greeted customer only" makes up for the other 7% of AI orders.*

Opportunities for Refinement

The path forward for AI in the drive-thru hinges on **fine-tuning comprehension and customization handling**.

If AI systems can better understand and process special requests, they will reduce the need for employee intervention and unlock a seamless end-to-end automated experience.

For QSRs, the focus will be on balancing speed with personalization—ensuring that the drive-thru of the future is both fast and flexible.



Recommendations to Operators

1. Address Lingering Slowdowns

Drive-thrus remain highly efficient, but total service times have not returned to pre-pandemic levels. Operators could evaluate queue management strategies, staffing models, and process flows to reduce wait time—now the largest gap compared to pre-2020 benchmarks.

2. Invest in Friendliness as a KPI

Friendliness is not just a soft skill—it is a proven driver of satisfaction, accuracy, and speed. Training programs could reinforce behaviors like eye contact, smiling, and clear communication, as these directly impact key performance metrics and guest loyalty.

3. Balance AI with the Human Touch

AI is proving valuable for improving speed and satisfaction but continues to struggle with friendliness and order customization. To maximize benefits, operators could:

- Use AI to streamline simple orders and boost throughput.
- Ensure a seamless **human-in-the-loop** process for complex or customized requests.
- Prioritize AI refinement in comprehension and customization handling to reduce errors and employee interventions.

Overall Takeaway

The drive-thru has evolved into a **digital fulfillment hub** where efficiency, personalization, and guest connection all matter. Operators who combine speed, friendliness, and smart AI integration will be best positioned to win in the modern drive-thru landscape.

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.

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

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

Suggestive Selling:
The practice of intentionally upselling an additional item. Can be done at any time while the order is being taken (the onset of your order or after you have ordered your item).
Example: Would you care to upsize your item and make it a combo?

Stations:
Stations are stops along the drive-thru such as windows/speakers/booths (i.e., where orders are taken, paid for, and picked up). A restaurant may have one "station" that handles all three functions or many "stations" to handle each function.

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.

Window Time:
Window time is the amount of time passed from arriving at the food pickup window to receiving your entire order. For locations with only one station, window time includes the time spent placing the order.

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

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For more information on this study, or any of our other studies and reports, contact letschat@intouchinsight.com.

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