

26th Annual 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 intouchinsight.com.

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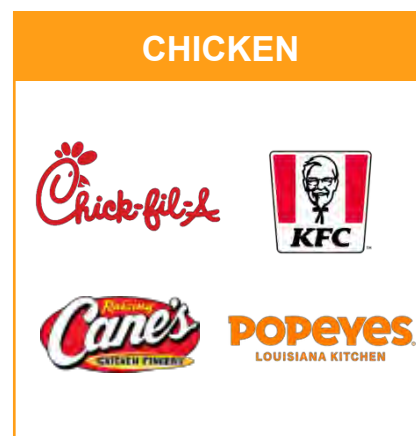
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Glossary

About the Study

The 26th Annual Drive-Thru Study is based on **165 mystery shops per brand** (2,145 visits in total) conducted across the United States between **June and July 2026**. 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.

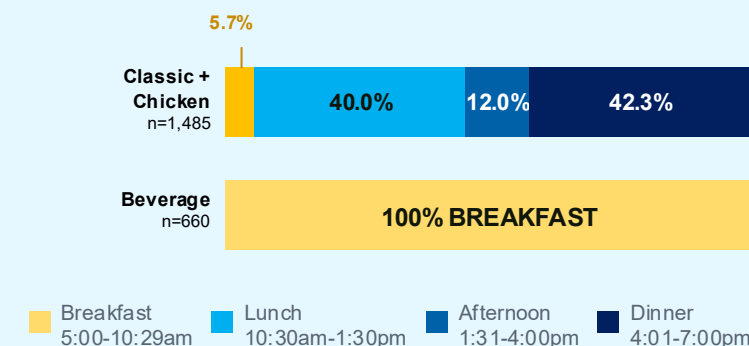
To make the insights more relevant for operators across the various segments, brands were grouped into three distinct categories based on their core offerings:



Metrics Tracked

1. Speed of Service
2. Order Accuracy
3. Suggestive Selling
4. Food Quality
5. Overall Satisfaction
6. Value, Packaging & Loyalty

Daypart Mix by Segment



Want More Drive-Thru Data?

To gain full access to the complete dataset, you can purchase it for **\$4,995 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 **\$11,500 USD** you'll receive:

- Your Brand Data: 150 mystery shops conducted at your locations (price includes 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.

Secure your spot for 2027 now!



Contact us at letschat@intouchinsight.com.



Overall Study Results

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

SECTION 01

Speed of Service

*All times are represented in a m:ss format. For example, 5 minutes and 24 seconds is 5:24.
Total time runs from entering the drive-thru to exiting with the order.*

Speed of Service
Avg. Total Time

5:24

2025: 5:35

SEGMENT LEADERS

CLASSIC



CHICKEN



BEVERAGE



How We Measure Speed of Service

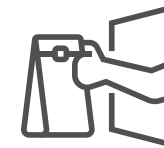
Every visit is timed from the moment the car joins the lane to the moment it leaves with the order. Four measures come out of that single timeline.



Enter the
drive-thru



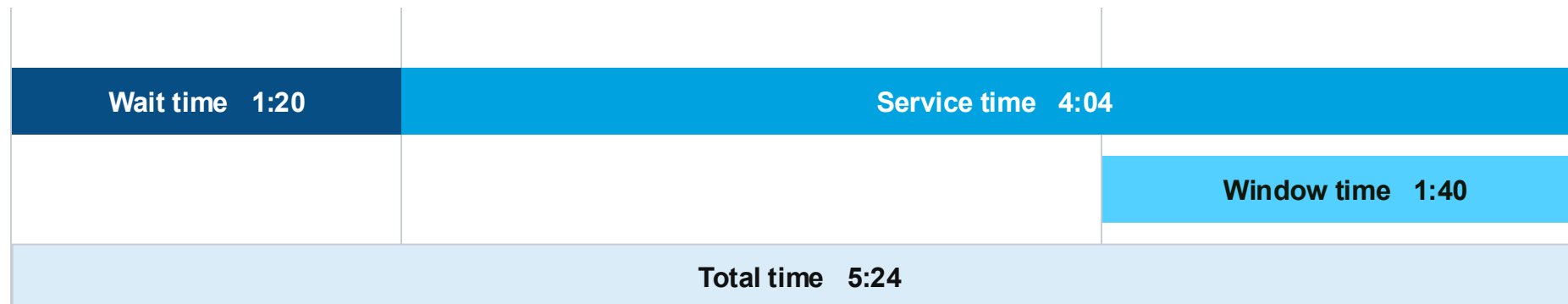
Place your
order



Arrive at the
pickup window



Exit with
your order



Wait time - from entering the lane to starting the order.

Window time - from arriving at the pickup window to receiving the whole order.

Service time - from starting the order to leaving with it.

Total time - wait time plus service time, the whole visit.

Bars are drawn to scale on the 2026 study averages. At single-station lanes the order is placed at the window, so window time there also covers the time spent ordering.

Where 2026 Got Faster

Total time improved **11.1 seconds to 5:24**. Almost all of it came out of service time.

○ 2025 ● 2026

STUDY AVERAGE

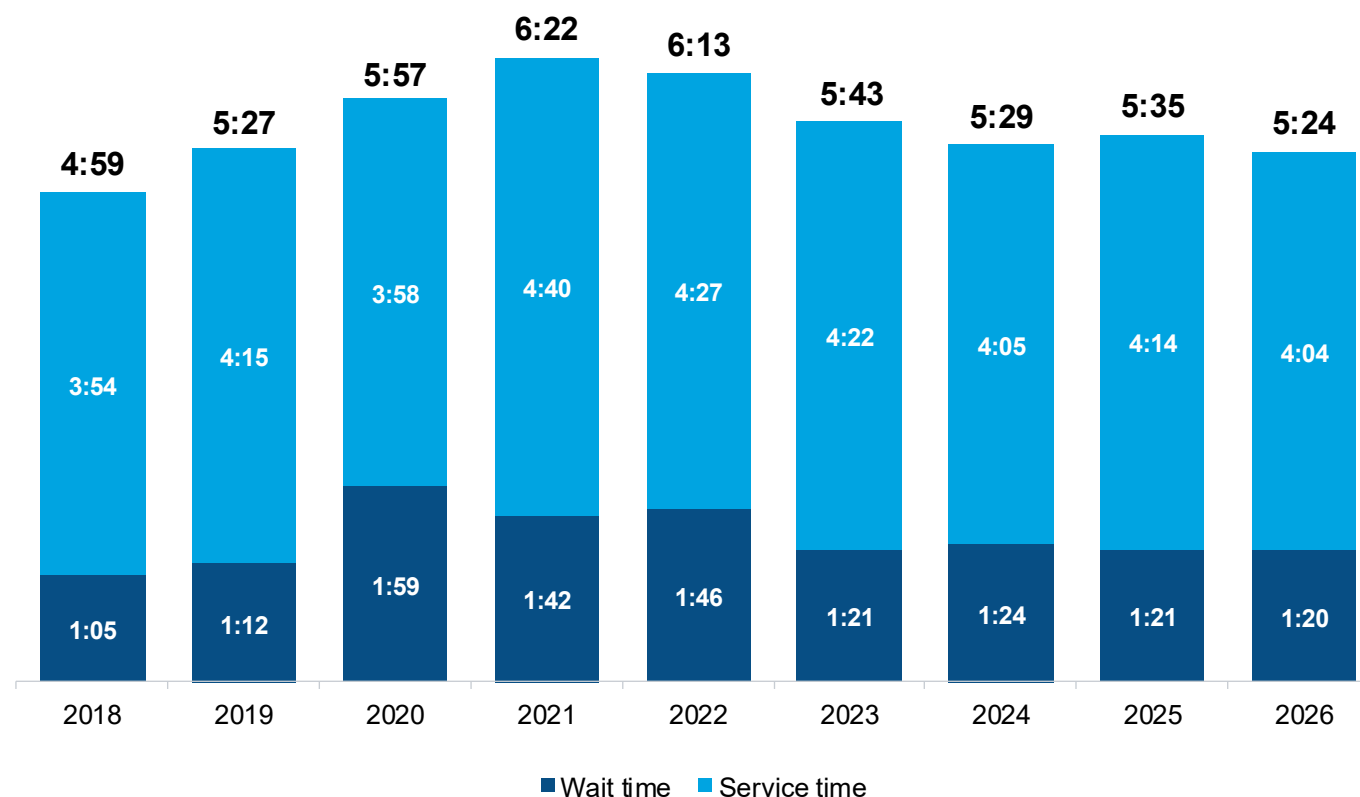


BY SEGMENT - TOTAL TIME



Window time is the time from arriving at the pickup window to receiving the whole order; at single-station lanes it also covers the time spent ordering. It fell 7.5 seconds, so the handoff at the window carried most of the service-time gain.

Drive-Thru Speed Over Time



58 seconds

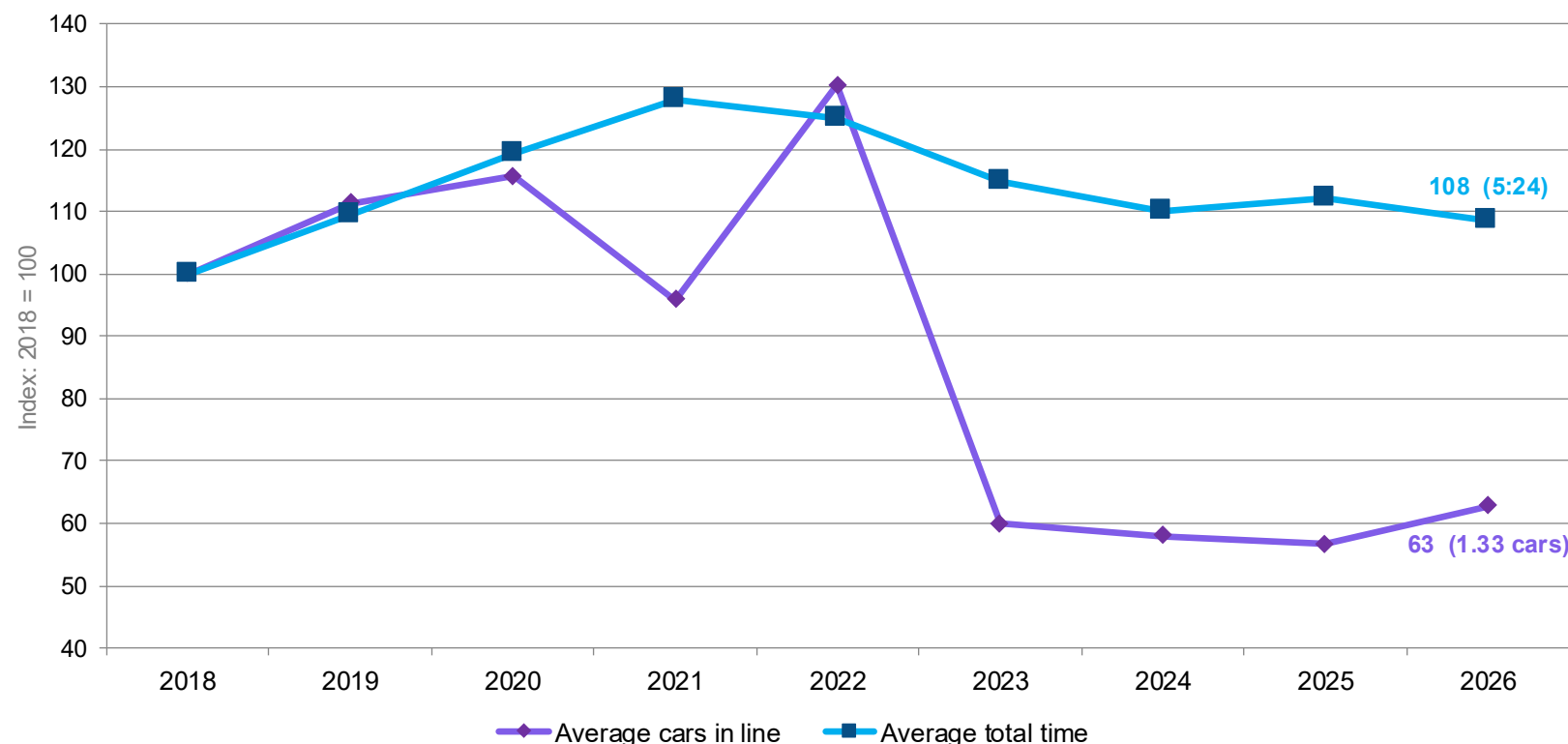
off the 2021 peak of 6:22

Total time peaked in 2021 and has fallen in four of the five years since. At **5:24**, 2026 is the fastest since 2018.

Both parts of the visit are faster than at the peak. Wait time had a greater reduction in percentage, down 21% from 1:42 to 1:20, almost all of it in 2023 and has remained flat for four years. Service time fell 13%, from 4:40 to 4:04, but that's 36 of the 58 seconds saved, and it's the only part still falling.

Queue Length vs. Total Time

Average cars in line and average total time



WHAT
CUSTOMERS
SAY



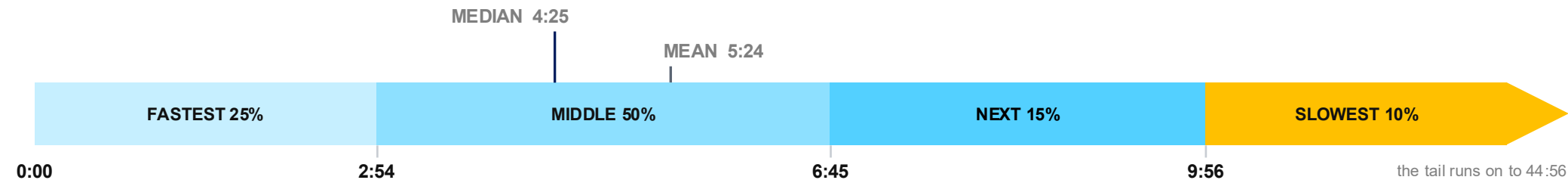
38.4%

name speed of service
the most important factor
in a visit (n=2,145).

Indexed to 2018 = 100. An index of 100 is that series' own 2018 level, so 108 means 8% above it.

Distribution of Total Time

The average visit took 5:24 in 2026, but half of all visits finished in under 4:25. A few very long visits pull that average up and those are the visits where things go wrong. The order is usually still right, but the guest is less likely to recommend.



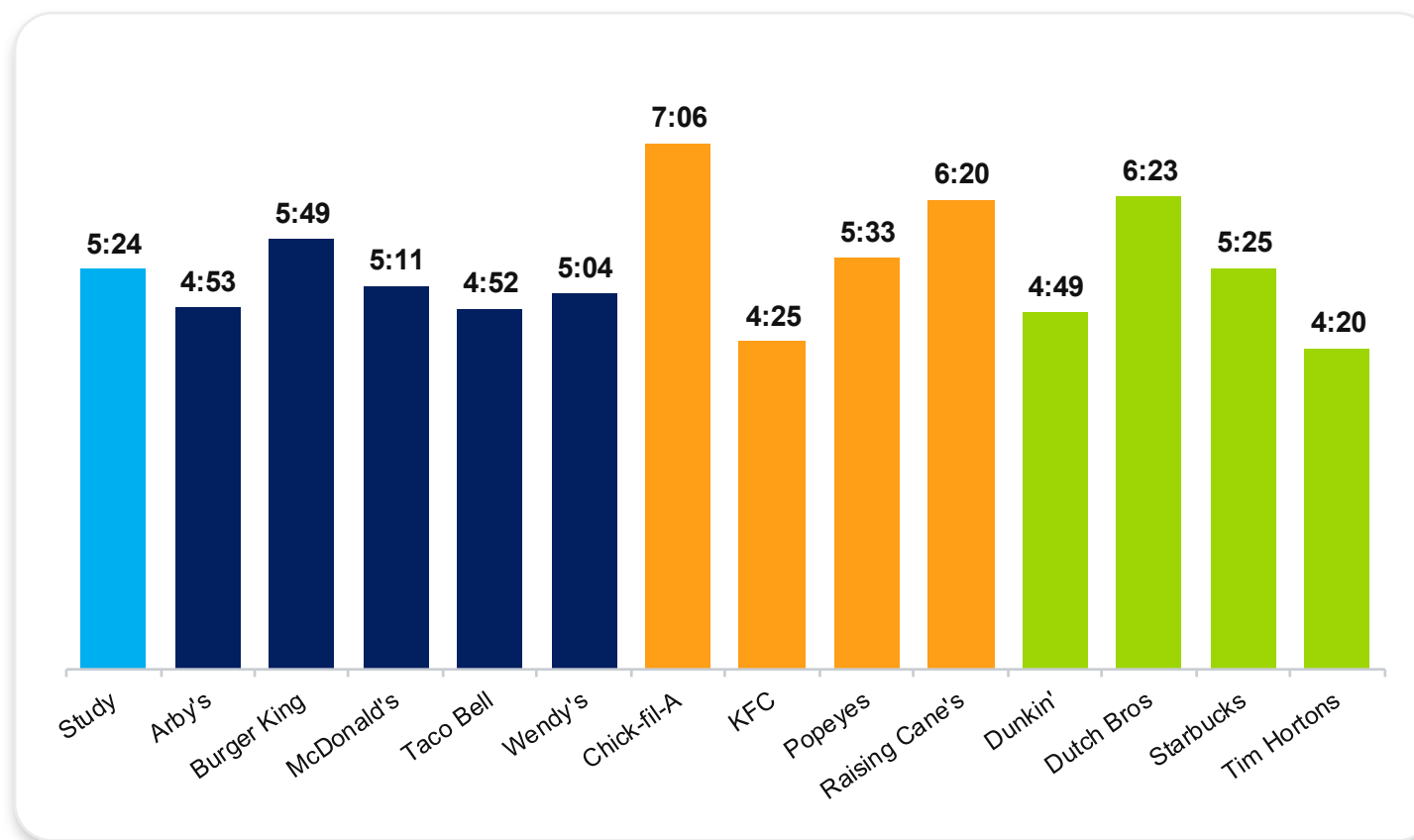
Satisfaction by Visit Length

Total time	Visits	Satisfied	Would recommend	Order accurate
Under 3 min	570	95.4%	80.2%	88.8%
3 - 5 min	683	94.7%	81.7%	89.6%
5 - 7 min	387	94.6%	78.3%	89.4%
7 - 10 min	293	94.2%	75.4%	87.7%
Over 10 min	212	84.9%	60.4%	92.0%

Speed of Service

Average Total Time by Brand

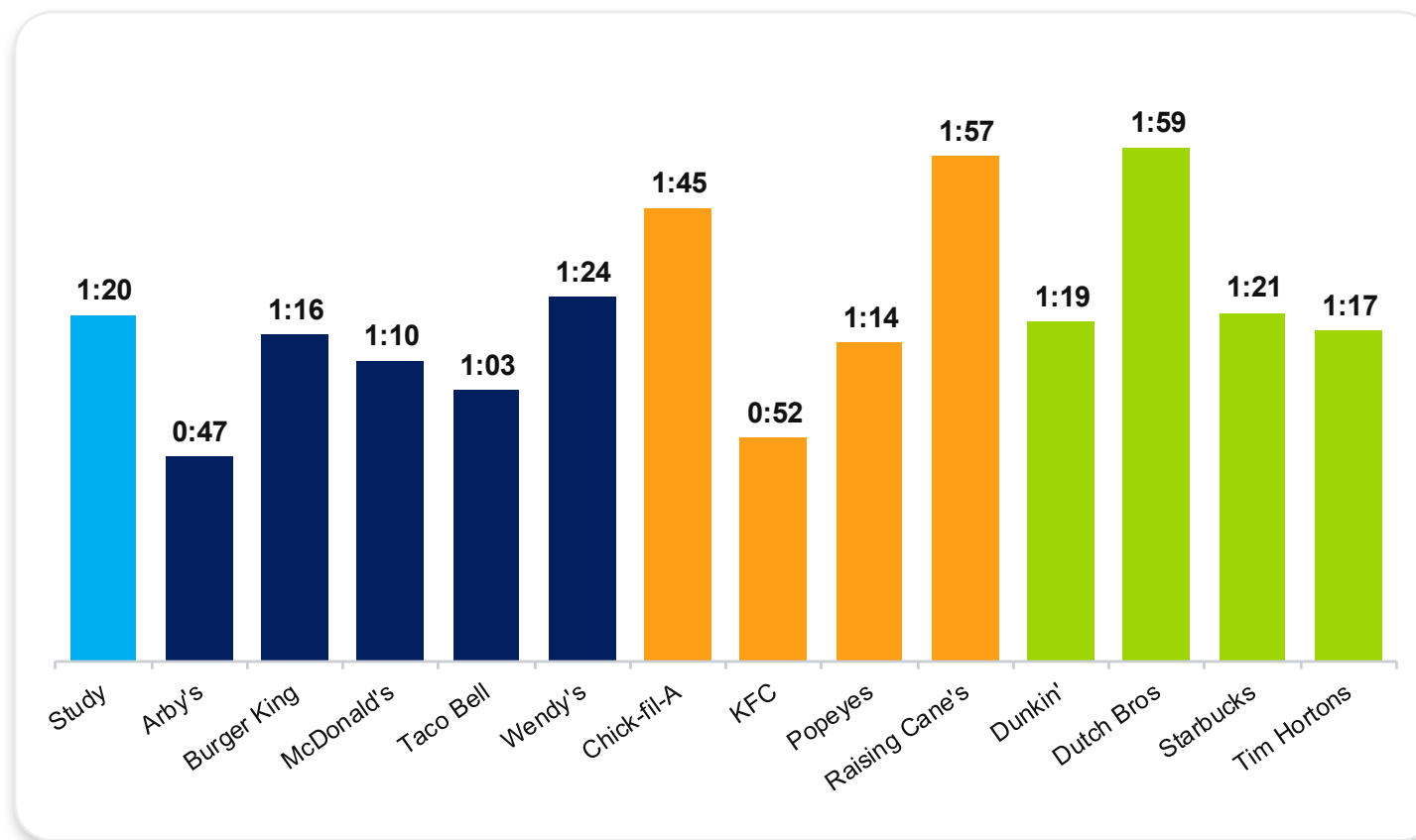
A 2:46 spread: Tim Hortons at 4:20 and Chick-fil-A at 7:06 sit nearly three minutes apart, yet eleven of the thirteen brands land within a minute of the 5:24 study average.



Speed of Service

Average Wait Time by Brand

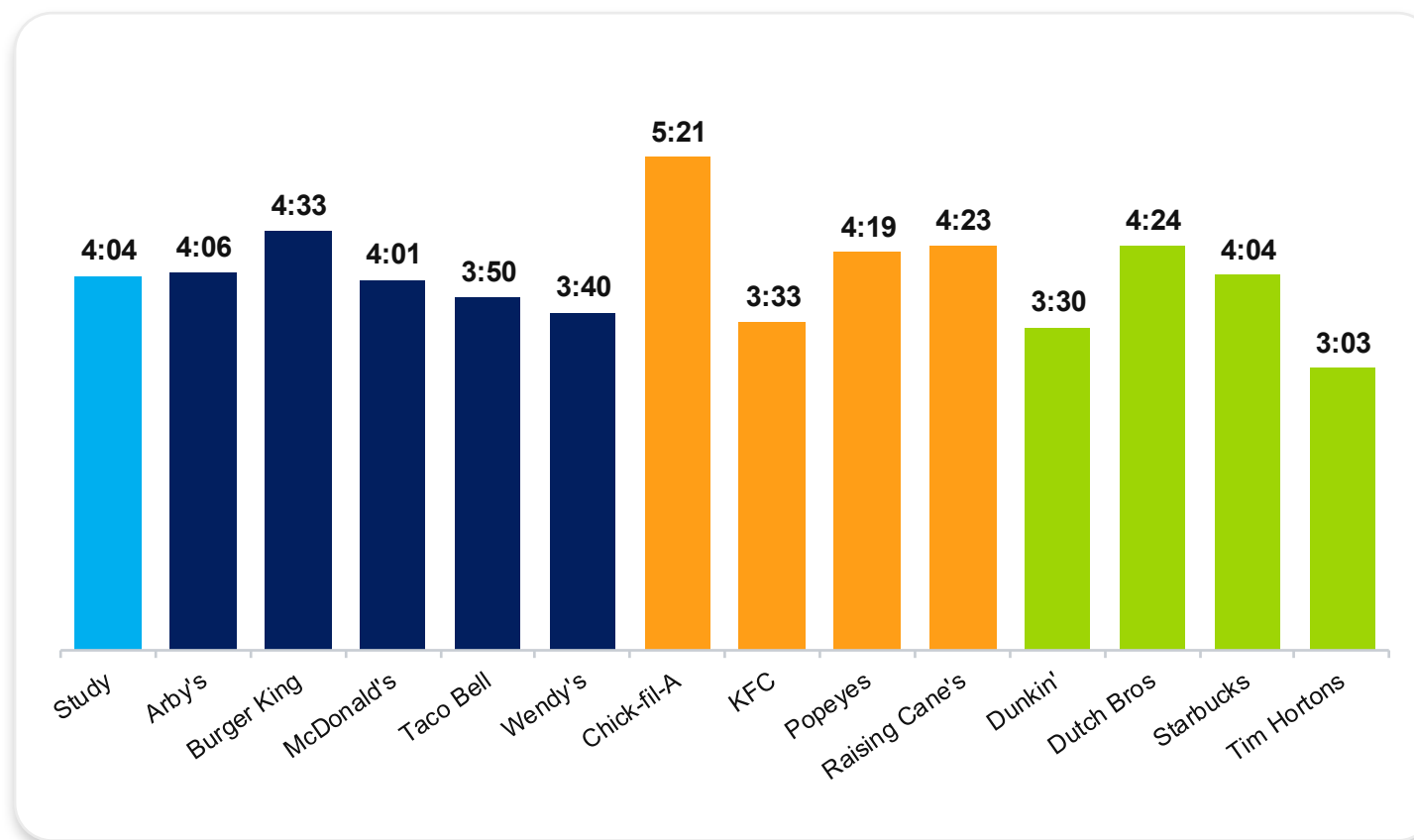
Wait is the smallest piece of the visit. At 1:20 it is a quarter of the average 5:24 visit, and improved only slightly, 0.5 seconds faster, over last year.



Speed of Service

Average Service Time by Brand

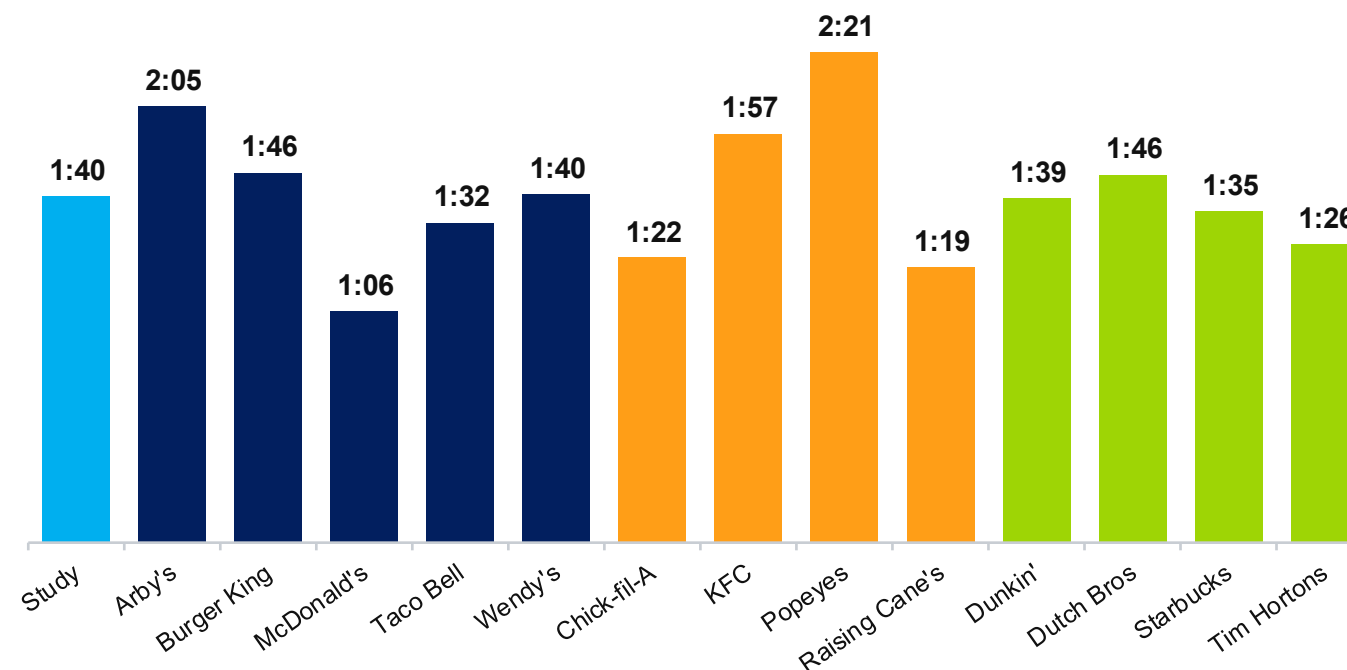
This is where the year was won. Service time is three quarters of the average visit, and 10.3 of the 11.1 seconds the study gained came out of it.



Speed of Service

Average Window Time by Brand

The window carried the gain. The window is 41% of service time, and its 7.5-second improvement accounts for nearly three quarters of the 10.3 seconds service time saved.

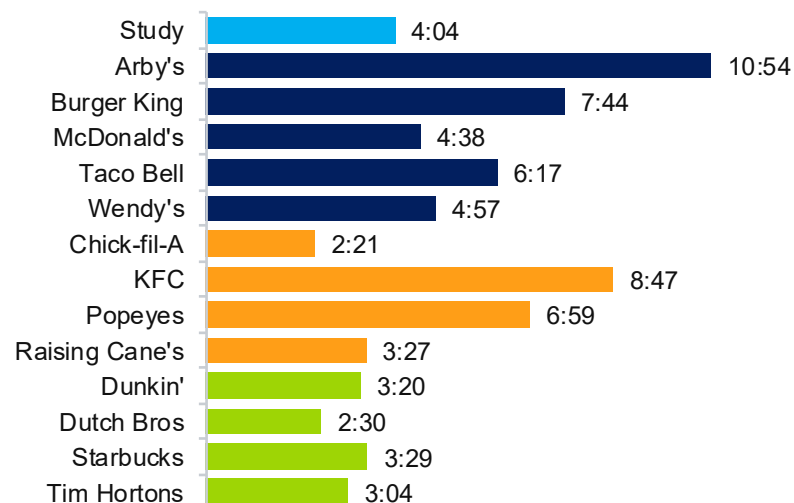


Speed of Service

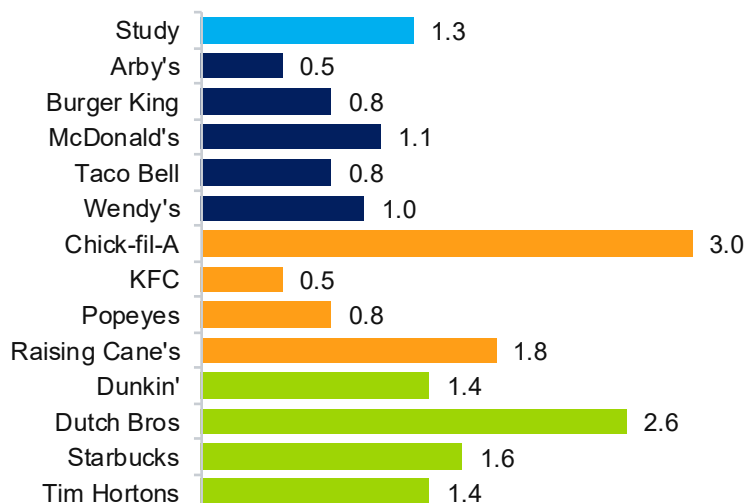
Average Time per Car in Line by Brand

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.

Average Total Time per Car in Line

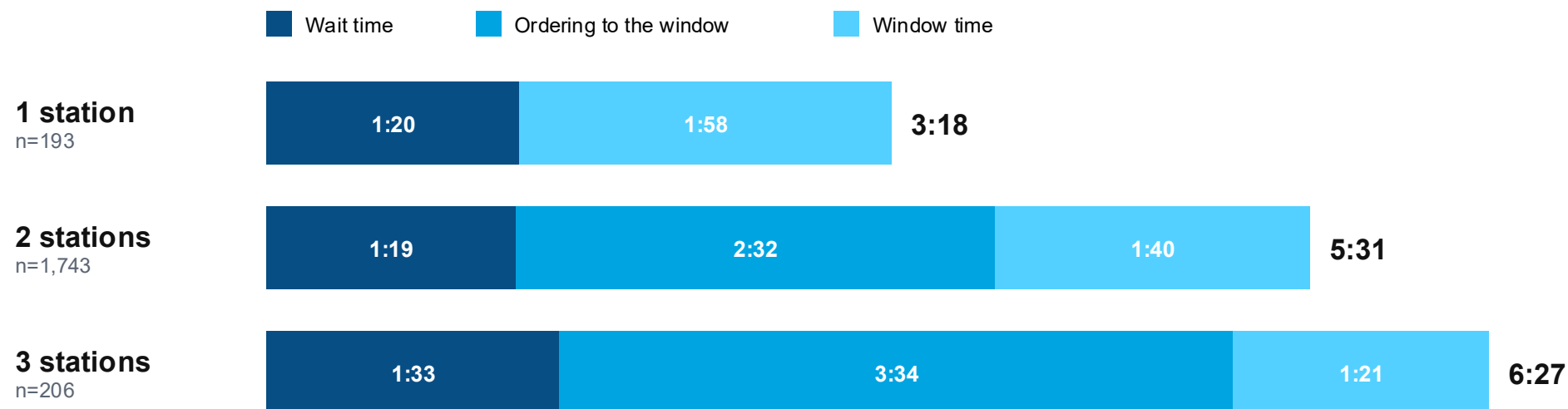


Average Cars in Line



Speed of Service by Number of Stations

Stations are stops along the drive-thru such as windows or speakers where orders are taken, paid for and picked up. A restaurant may have one station that handles all three functions, or several that split them.



At single-station lanes the order is placed at the window, so window time and service time are the same measure.

Lane Flow and Total Time

Customers rated the overall flow and efficiency of the order experience on a three-point scale.

1

**Perfectly smooth
and efficient**

4:45

average total time

Overall satisfaction	97.1%
Order accuracy	91.8%
Good or excellent value	57.4%
Rated service friendly	83.3%
Visits	n=1717

2

**Mostly smooth, but felt
slow / had a minor hitch**

7:25

average total time

Overall satisfaction	87.4%
Order accuracy	81.1%
Good or excellent value	41.1%
Rated service friendly	64.7%
Visits	n=365

3

**Frustrating
and inefficient**

11:18

average total time

Overall satisfaction	42.9%
Order accuracy	69.8%
Good or excellent value	20.6%
Rated service friendly	42.9%
Visits	n=63

Perceived Speed vs. Actual Total Time

Q: When thinking about the 'speed' of your overall experience, was it: Quicker than expected / As expected / Slower than expected?

Quicker than expected

3:54

average total time
743 visits · 34.6%

65.3%

very likely to recommend

96.8%

satisfied

As expected

5:09

average total time
1,097 visits · 51.1%

43.3%

very likely to recommend

95.1%

satisfied

Slower than expected

9:57

average total time
305 visits · 14.2%

12.8%

very likely to recommend

82.3%

satisfied



SECTION 02

Order Accuracy

Order accuracy measures how accurate the order was, including the main entree, side item, beverage and any special requests. Shoppers answered a single yes/no question.

Order Accuracy Avg.

89.3%

2025: 86.9%

SEGMENT LEADERS

CLASSIC



CHICKEN

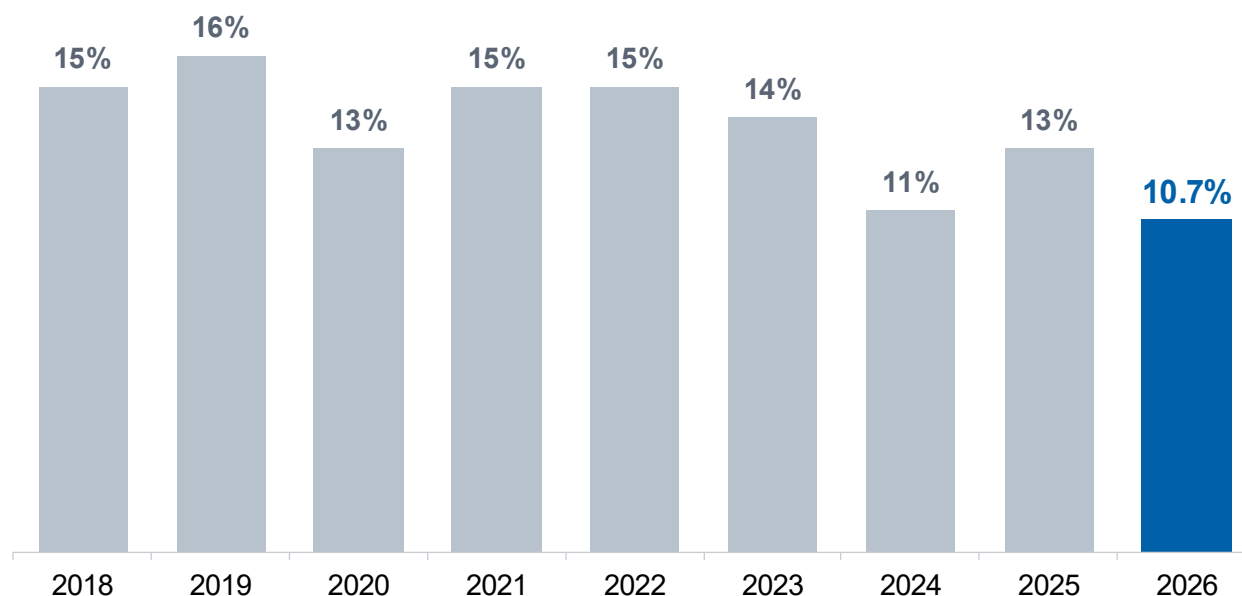


BEVERAGE



Order Accuracy Over Time

Share of orders with something wrong

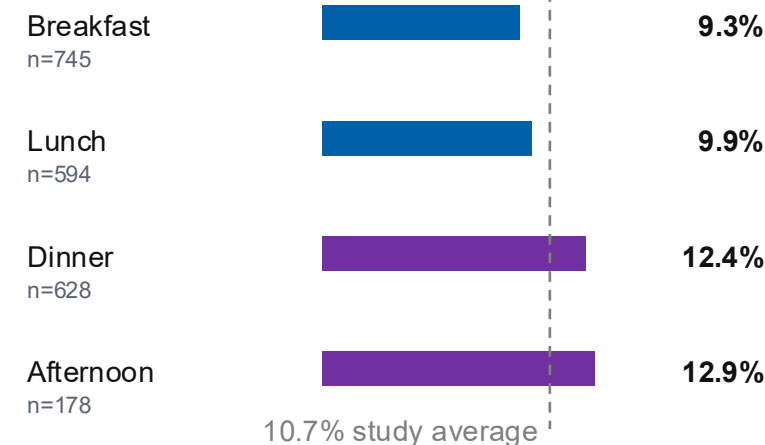


What counts as something wrong: any part of the order not filled correctly or completely. Missing napkins, straws and utensils are asked separately and are not counted here.

89.3%

of 2026 orders were filled correctly, 2.4 points better than 2025

Inaccuracy by Daypart



WHAT CUSTOMERS SAY

28.4%

name order accuracy the most important factor, second only to speed.

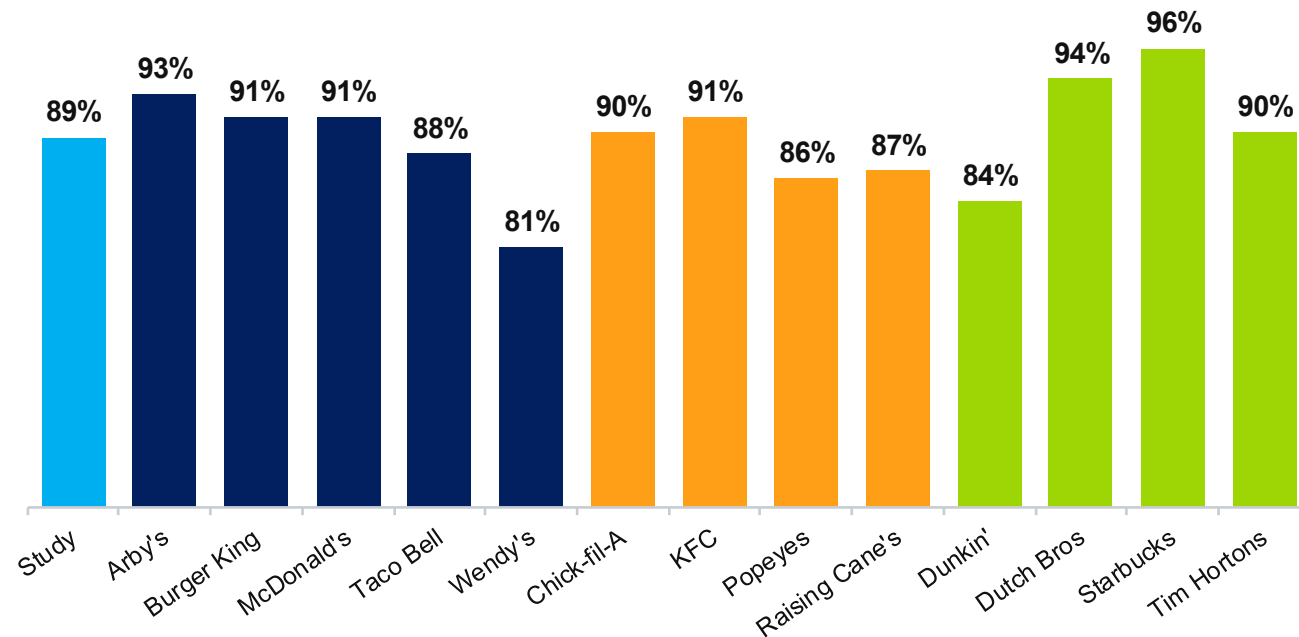


Order Accuracy by Brand

What went wrong?

Leading reasons an order was marked inaccurate (n=229 inaccurate orders):

- 43%** Customization was not accurately provided
- 13%** Packaged condiment request not fulfilled
- 13%** Main entree was wrong item
- 11%** Main entree had wrong ingredients



Menu Boards and Order Confirmation

The menu board

Observed on all 2,145 visits

50.2% of primary menu boards were digital rather than static panels

96.8% were in clean, good working condition

21.9% displayed a limited-time offer

2.1% had visible physical damage

1.6% were blank or partly out of order

Digital menu boards by segment: Classic 58.8%, Beverage 57.4%, Chicken 32.3%.

Order confirmation

Board presence on all 2,145 visits unless otherwise noted

44.4% of visits had an order confirmation board present

94.9% of those boards showed the order correctly (n=953)

48.5% of those shoppers were asked to confirm what they saw (n=953)

77.7% had the order read back to them where there was no board (n=1,192)

85.3% of all visits received some form of confirmation, board or read-back

Board presence by segment: Classic 58.7%, Beverage 58.6%, Chicken 12.4%.

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.

51.6%

2025: 57.5%

SEGMENT LEADERS

CLASSIC



CHICKEN

POPEYES
LOUISIANA KITCHEN

BEVERAGE

Tim
Hortons

Suggestive Selling by Segment and Brand

Suggestive sell offered, by segment -
Chicken 70.3%, Classic 62.3%,
Beverage 19.5%; study 51.6%.

What was suggested?

Make it a combo/meal/box	83%
Upsize/larger size	23%
Dessert or sweet treat	12%
Additional side item	11%
Special promotion or new item	7%

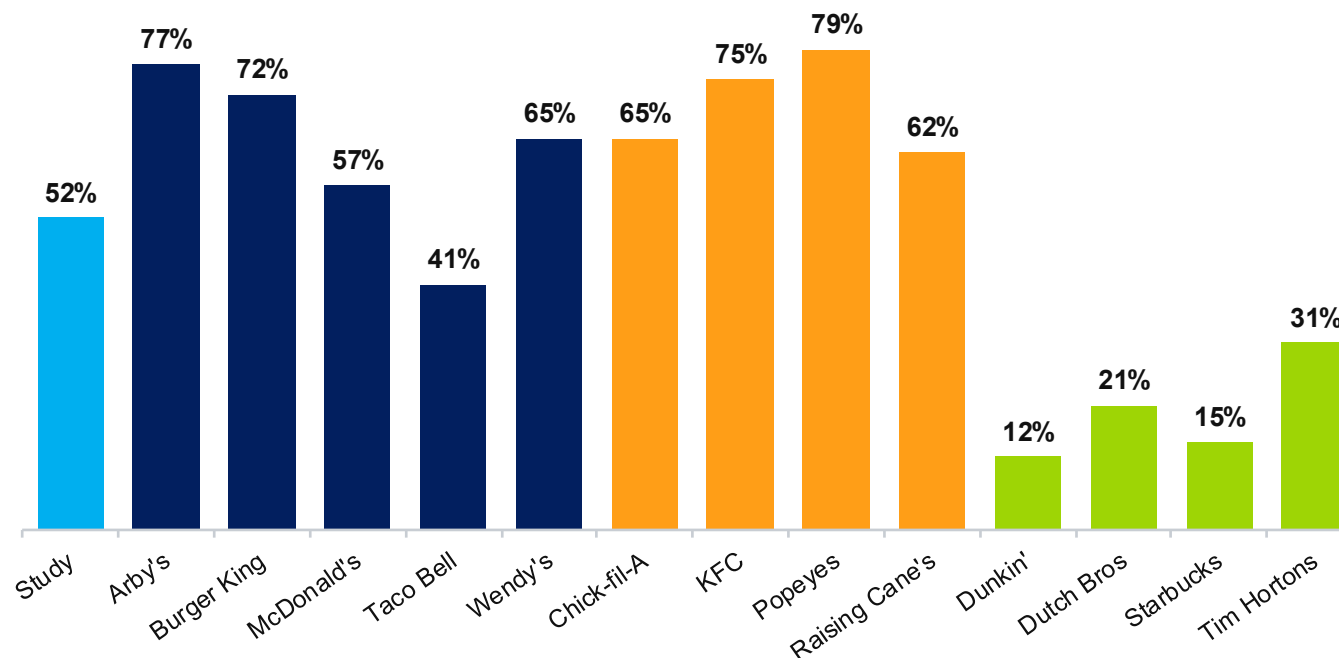
Multiple answers were allowed, so the shares do not total 100%.

WHAT CUSTOMERS WANT NEXT

41.1%

want heat in the next flavor they try - Swicy 22.2% plus spicy and bold 18.9%; only 5.2% would rather not try anything new (n=2,145).

Q: Thinking about your personal dining habits, which type of new flavor profile are you currently most interested in trying at quick-service restaurants?



SECTION 04

Food Quality

Food/Beverage Quality is the taste on the main entree/beverage, each scored on the item it was shopped on.

Food Quality Avg.

97.3%

2025: 97.1%

Beverage Quality Avg.

96.4%

2025: 96.6%

SEGMENT LEADERS

CLASSIC



CHICKEN



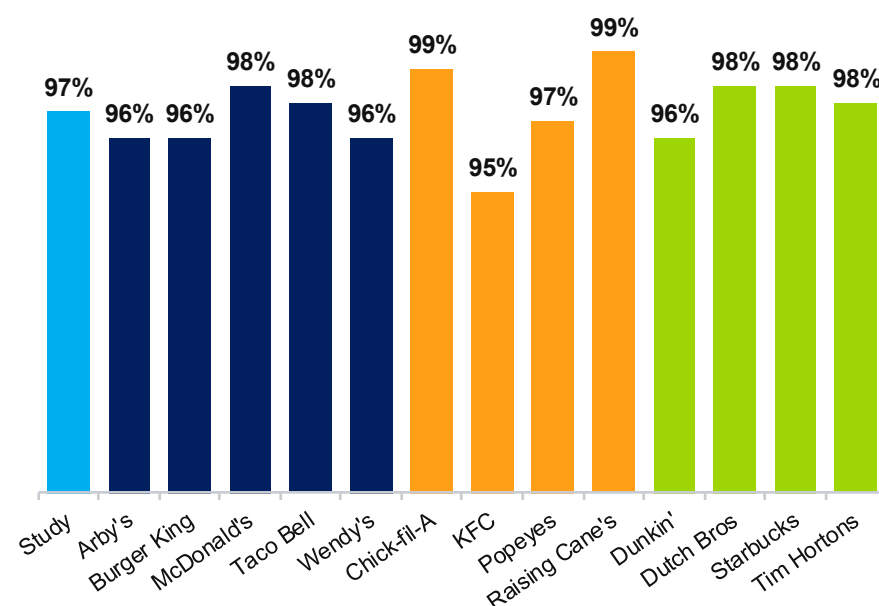
BEVERAGE



Main Entree Quality by Brand

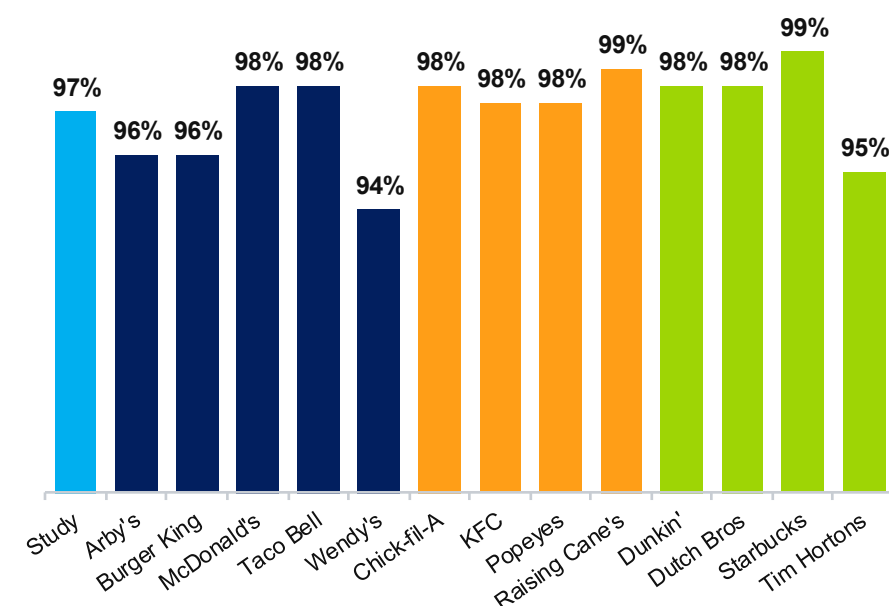
Main Entree Taste by Brand

Whether the main entree tasted as expected.



Main Entree Temperature by Brand

Whether the main entree temperature was as expected.



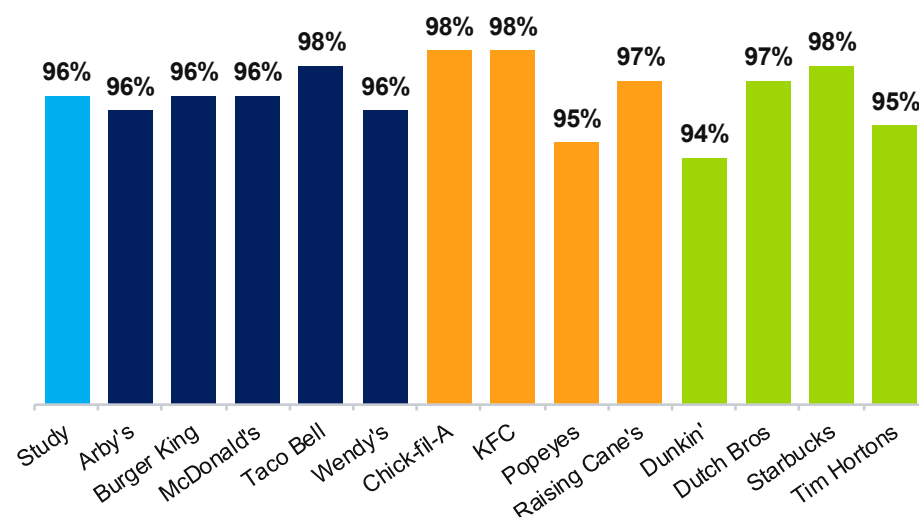
All 13 brands, n=165 each, every brand scored on the main entree it was shopped on.

Beverage Quality by Brand

Every visit included a beverage, so all 13 brands are compared like for like on the same item. For the four Beverage brands this is the quality measure that defines the category.

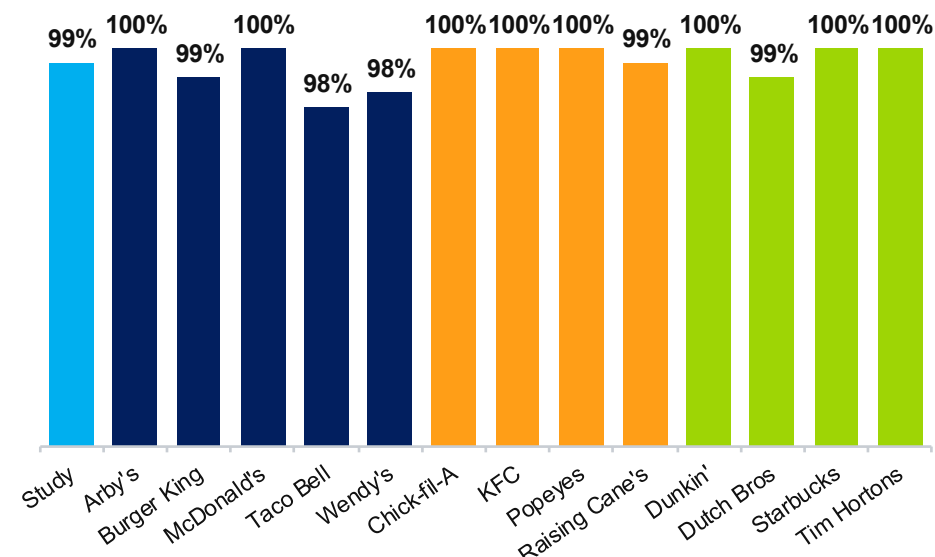
Beverage Taste by Brand

Whether the beverage tasted as expected.



Beverage Temperature by Brand

Whether the beverage temperature was as expected - coffee hot, soft drinks cold.



Beverage Mix and Flavor

Shoppers picked one of three answers - Perfect, Minor Issue or Major Issue - on the drink they were assigned.

Perfect Correct flavor and balanced - correct syrup, crisp carbonation, properly brewed.	1,949 drinks	Minor Issue Flavor slightly weak, watery or overly sweet because of an improper mix.	161 drinks	Major Issue Flat, a completely wrong flavor, or tasting heavily of carbonated water or syrup.	35 drinks
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SHARE OF DRINKS BY RATING



Side Item Temperature Over Time

Main entree temperature has held at **97%** for a third year. Side items reached **96.0%**, their highest reading in the nine-year series, six points above the 2020 low.

Share of visits where the item arrived at the temperature expected

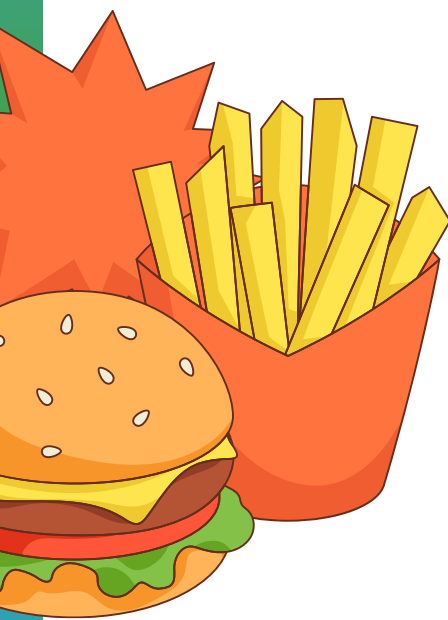
	2018	2019	2020	2021	2022	2023	2024	2025	2026
Main entree	94%	95%	93%	95%	94%	96%	97%	97%	97%
Side item	93%	92%	90%	94%	94%	94%	95%	95%	96%

Side-item measures use a 2026 base of n=1,980

WHAT CUSTOMERS SAY

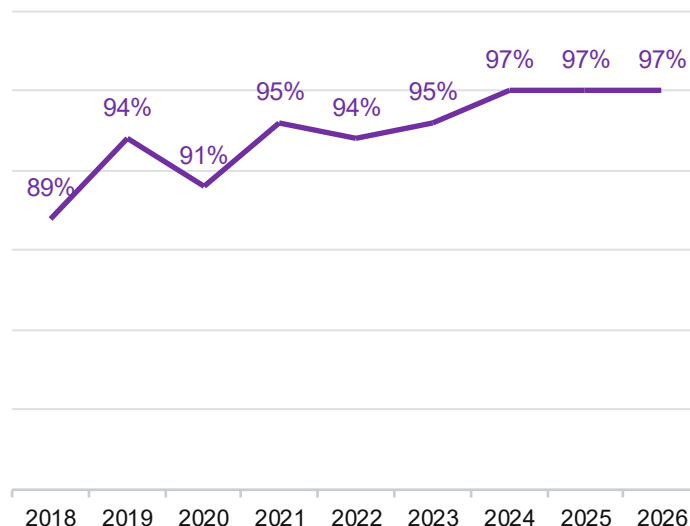
20.6%

name food temperature and freshness the single most important factor in a drive-thru visit - third behind speed and accuracy (n=2,145).

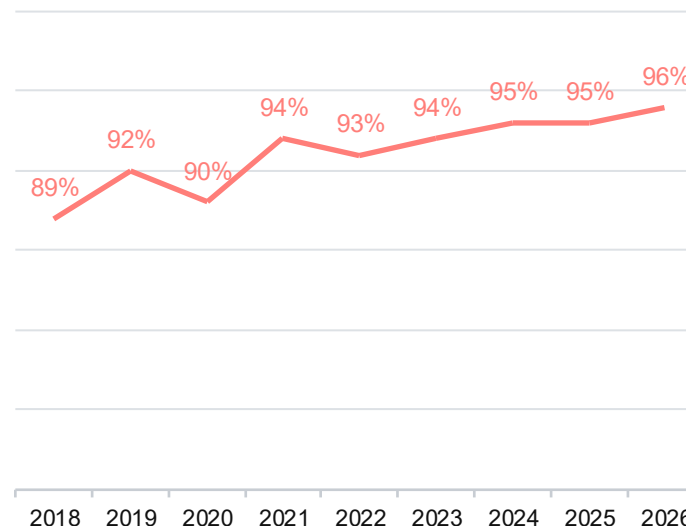


Food Quality Trends Over Time

Main Entree Taste



Side Item Taste



Packaging and Portability

89.7%

rated packaging perfectly secure and highly convenient.

96.2%

are at least somewhat confident eating the meal in their vehicle while on the go.

Side-item taste base n=1,980.

SECTION 05

Overall Satisfaction

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

Satisfaction Avg.

93.8%

2025: 91.2%

SEGMENT LEADERS

CLASSIC



CHICKEN



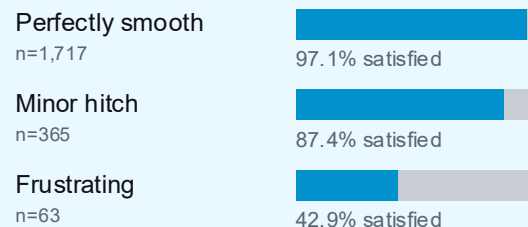
BEVERAGE



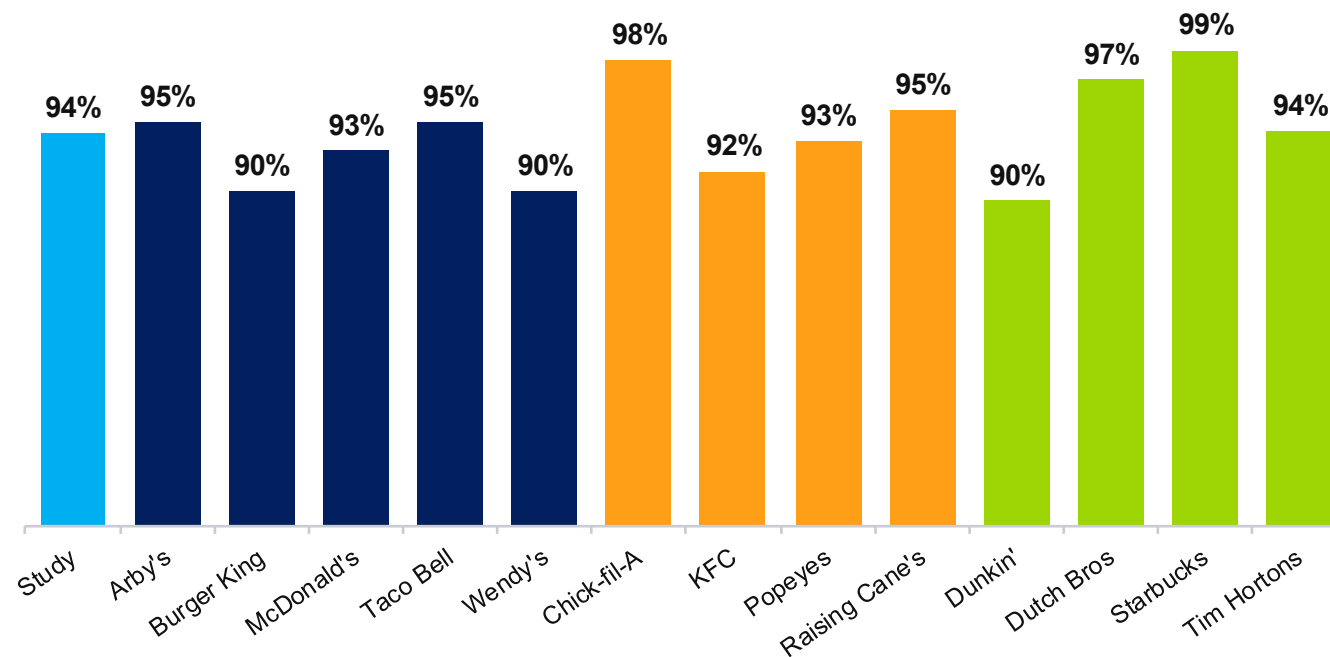
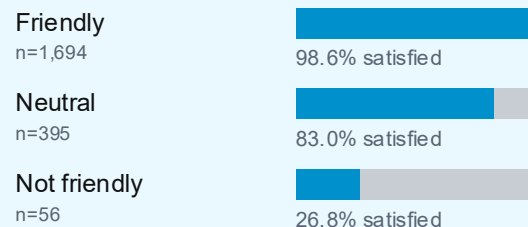
Overall Satisfaction by Brand

What travels with satisfaction

HOW THE LANE FELT

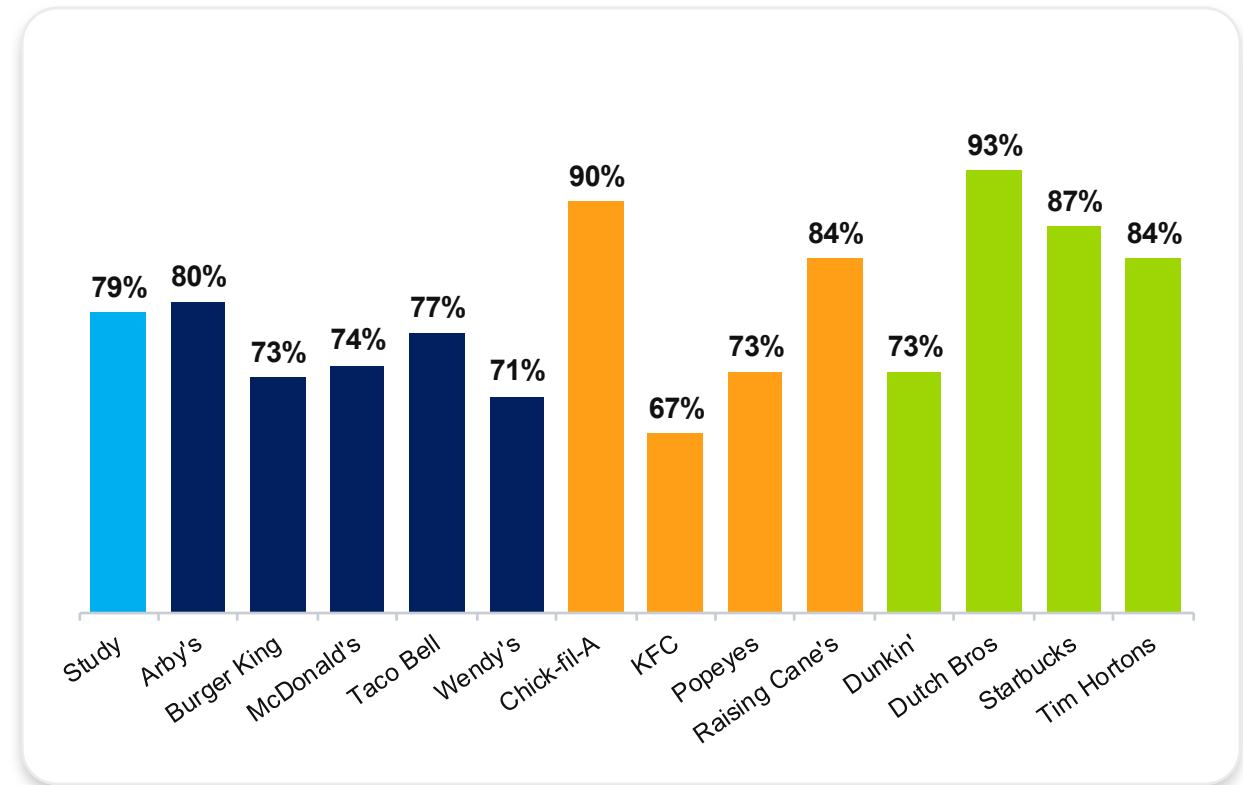


HOW SERVICE WAS RATED



Friendliness by Brand

To measure friendliness, shoppers rated the service received as Friendly, Neutral or Not Friendly, and the score is the percentage who rated it friendly.



The Power of Friendliness



When service was friendly

Overall satisfaction	98.6%
Order accuracy	91.3%
Average total time	5:16
Would recommend	86.5%
Good or excellent value	58.6%
<i>n=1694</i>	



When service was not friendly

Overall satisfaction	26.8%
Order accuracy	73.2%
Average total time	5:41
Would recommend	19.6%
Good or excellent value	21.4%
<i>n=56</i>	

Excellent/Good value is built from several strengths at once, not speed alone

Excellent/Good value (n=1148)

Satisfaction	98.0%
Accuracy	92.2%
Friendly	86.5%
Packaging secure	94.7%

Average value (n=823)

Satisfaction	91.1%
Accuracy	87.7%
Friendly	71.6%
Packaging secure	84.9%

Poor value (n=174)

Satisfaction	79.3%
Accuracy	78.2%
Friendly	64.4%
Packaging secure	79.3%





Segment Deep Dive

Classic | Chicken | Beverage

The Segment Deep Dive

Each segment tells its own story, and the study average smooths over most of it. The full research package breaks down Classic, Chicken and Beverage in detail. Here's a preview of what's inside.

CLASSIC

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

Total time **5:10**
fastest segment

Cars in line **0.8**
lightest queues in the study

Suggestive selling **62.3%**
against a 51.6% study average

Friendliness **74.9%**
lowest of the three

CHICKEN

Chick-fil-A · KFC
Popeyes · Raising Cane's

Total time **5:51**
slowest segment

Service time **4:24**
longest in the study

Good or excellent value **62.4%**
highest of the three

Suggestive selling **70.3%**
the most active in the study

BEVERAGE

Dunkin' · Dutch Bros
Starbucks · Tim Hortons

Total time **5:14**
fastest brand (Tim Hortons)

Order accuracy **91.1%**
highest of the three

Satisfaction **94.8%**
highest of the three

Suggestive selling **19.5%**
a different menu, a different ask

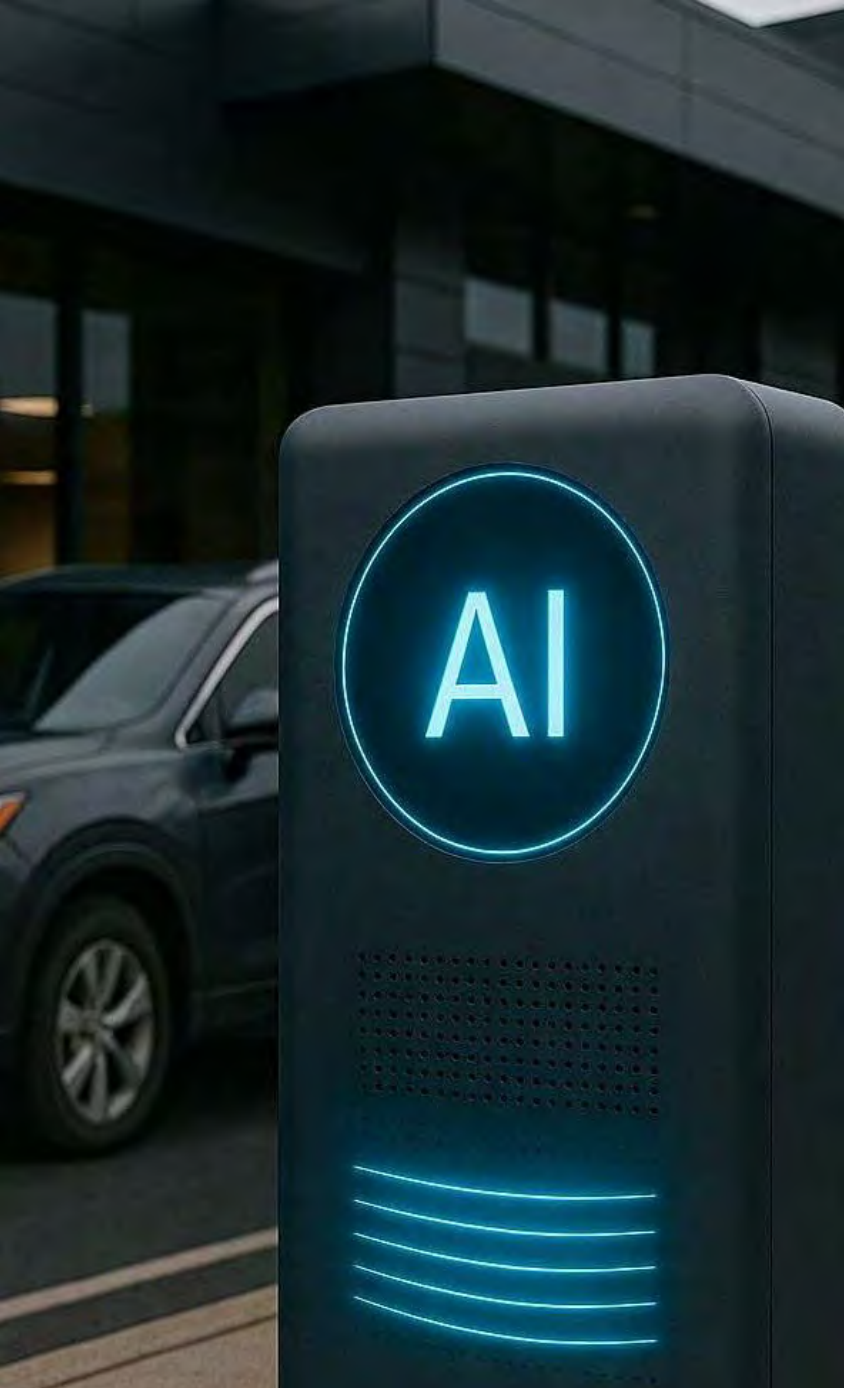
IN THE FULL PACKAGE

- A performance overview for each segment, 2026 against 2025 and against the study, on eleven measures
- A daypart speed breakdown - breakfast, lunch, afternoon and dinner
- A brand scoreboard for every brand within its segment
- The full brand-level detail behind every chart in this report

The segment chapters are part of the full research package.

Contact Intouch Insight for the complete 26th Annual Drive-Thru Study, including all segment and brand-level detail.

letschat@intouchinsight.com

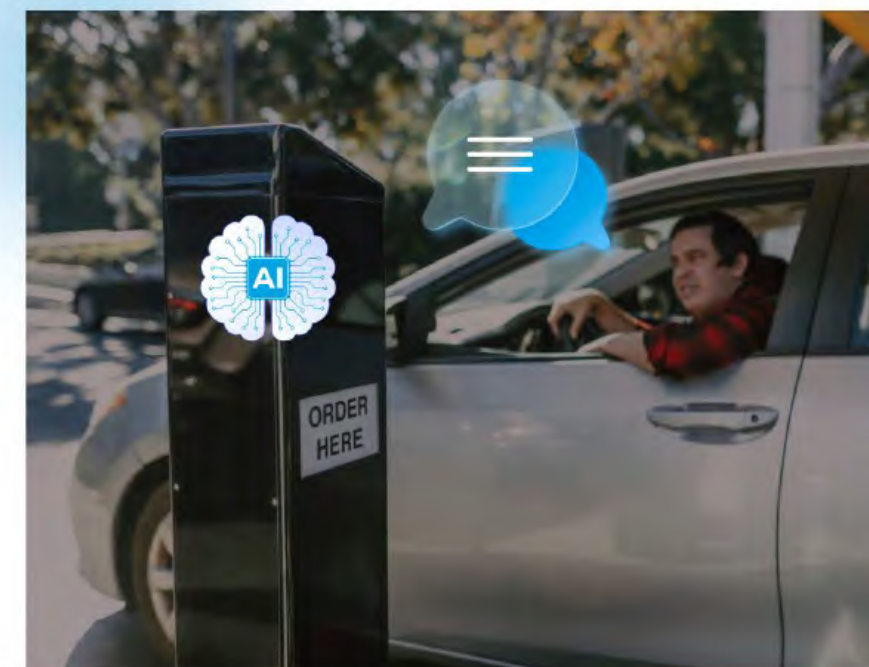


Voice AI Ordering

How We Measured Voice AI This Year

Voice AI was measured the same way it was in 2025, on its own designed sample. Shoppers completed 40 visits at each of three brands running voice AI ordering - Burger King, Taco Bell and Wendy's - for 120 AI-enabled visits in June and July 2026. The same mystery shop questionnaire was used as on the base study, so every measure on those visits is directly comparable.

On 95 of the 120 visits a shopper met a voice AI, and on 92 the AI actually took some or all of the order. Three shoppers received an automated greeting and then ordered from an employee; an automated greeting is not a voice AI ordering system, so those visits are not counted as AI ordering.



Automation vs. AI

Voice AI is maturing, but most of what customers run into today is automation, not AI. When looking at the data from the core study, the frequency of customers encountering automation is relatively low. At locations reported to be running voice AI, the picture flips: almost every automated interaction was an AI taking the order.

CORE STUDY · 2,145 VISITS

All 13 brands

113

visits

met some form of automation

77

visits

got an automated greeting only - an employee took the order

36

visits

had a voice AI take some or all of the order

AI SAMPLE · 120 VISITS

Forty visits at each of the three brands (Burger King, Taco Bell, and Wendy's) at locations reported to be running voice AI ordering.

95

visits

met some form of automation

3

visits

got an automated greeting only - an employee took the order

92

visits

had a voice AI take some or all of the order



How Shoppers Rated AI

Tone and ease are two ratings of the same 92 visits where the AI took the order - each row below is a full set of answers to one question. The three measures further down are separate questions, asked only about the 77 of those orders the AI completed end-to-end.

TWO RATINGS OF EVERY VISIT THE AI TOOK

Tone of the AI

n = 92



Ease of the interaction

n = 92



THREE SEPARATE MEASURES - ONLY ON THE 77 ORDERS THE AI COMPLETED END-TO-END

93.5%

AI answered the shopper's question
n = 77

90.9%

AI confirmed the order back to the shopper
n = 77

90.0%

AI was correct about the order it confirmed
n = 70

Tone and ease are read as full answer sets on the same n=92 visits and are not comparable to the three measures below, which run on a smaller, end-to-end-only base (n=77, n=77, n=70).

Voice AI vs. Employee Performance

Every figure here compares the 120 AI-enabled visits against visits to the same three brands in the main study, so the two groups differ by the AI and not by which brands are in them. The visit takes about the same time overall, but almost everything during it gets better.

TIME

wait and service time, minutes:seconds

AI locations · n=120

Wait 1:03

Service 4:11

5:14

Same brands · n=495

Wait 1:14

Service 4:01

5:15

AI locations: 11.1 sec less wait, 10.2 sec more service - the total comes out almost even, 0.9 sec faster.

RATES

	2026 DIFFERENCE	2026 AI LOCATIONS	2026 SAME BRANDS	2025 DIFFERENCE	2025 AI LOCATIONS	2025 SAME BRANDS
Suggestive sell offered	+20.0 pts	79.2%	59.2%	+8.2 pts	70.8%	62.6%
Had to repeat part of the order	+8.7 pts	29.1%	20.4%	+9.8 pts	34.2%	24.4%
Order accuracy	+4.2 pts	90.8%	86.7%	-4.6 pts	82.5%	87.1%
Service rated friendly	+4.0 pts	77.5%	73.5%	-2.9 pts	70.8%	73.7%
Employee said "thank you"	-2.9 pts	72.5%	75.4%	-1.6 pts	75.0%	76.6%
Employee had a pleasant demeanor	+2.5 pts	83.3%	80.8%	-4.2 pts	75.8%	80.0%
Speaker interaction clear	+3.7 pts	97.4%	93.7%	+4.1 pts	97.5%	93.4%
Overall satisfaction	+2.4 pts	94.2%	91.7%	+7.4 pts	96.7%	89.3%

AI locations n=120 in both years, against the same three brands (Burger King, Taco Bell, Wendy's) in that year's base study, Descriptive only - AI locations were selected, not randomized.

Glossary

AI interaction path:

how an AI-taken order unfolded: the AI handled the entire interaction, or it began the order and transferred to an employee.

Average time per car in line:

calculated by dividing total time by average cars in line.

Beverage quality:

whether the beverage tasted as expected. Temperature is reported separately and the two are never averaged. A beverage was part of every assigned order, so the base is all 2,145 visits.

Food quality:

where a single food-quality figure is shown, it is taste only - whether the main entree tasted as expected - across all 13 brands, each scored on the main entree it was shopped on. Nine brands were shopped on a hot prepared entree and four on a reheated sandwich or a packaged bakery item; that breakout is reported on Main Entree Quality by Item Type.

Friendliness:

to measure friendliness, shoppers were asked to rate the service received on a three-level scale: Friendly, Neutral, Not Friendly. The reported score is the Friendly share.

Lane flow rating:

shoppers rated the overall flow and efficiency of the order experience as perfectly smooth, mostly smooth with a minor hitch, or frustrating and inefficient.

Like-for-like item rule:

quality measures compare the same item family across brands: main entree against main entree, beverage against beverage, side against side. Where an item is not comparable, brands are reported separately rather than ranked together.

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 the customization.

Order Confirmation Board (OCB):

An LED or LCD graphic board that displays the customer's order during the order-taking process. Typically located around, or incorporated into, the menu board.

Order-taking model:

how the order was taken on a visit: at a speaker, face-to-face at the vehicle, or by a voice AI.

Satisfaction with level of service:

how satisfied shoppers were with the overall drive-thru experience, staff friendliness, and expectations regarding speed and experience. Shoppers selected 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.

Side item groups:

assigned sides are grouped by holding requirement: hot (fries, hash browns, potatoes, rice, mac and cheese, chili), bakery and ambient (donuts, cookies, cake pops, chips), and chilled (cole slaw, salad, fruit). They are charted separately.

Side item quality:

whether the side item tasted as expected, on the visits where a side was part of the assigned order (n=1,980). Temperature is reported separately. One brand carries no side item and is reported as n=0 rather than as a zero score.

Stations:

stops along the drive-thru such as windows or speakers, where orders are taken, paid for and picked up. A restaurant may have one station handling all three functions, or several.

Suggestive selling:

the practice of intentionally upselling an additional item. Can be done at any time while the order is being taken. 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 the shopper enters the drive-thru and ends once they exit with their food.

Value for money:

shoppers rated the overall value of the assigned order on a five-point scale: Excellent, Good, Average, Poor, Very poor. Figures labeled good or excellent value are the top two points; poor or very poor value are the bottom two.

Voice AI exposure:

the share of base-study visits on which a shopper reported any automation, reported separately from voice AI ordering and never used to score performance.

Voice AI ordering:

a visit on which a voice AI took some or all of the order. An automated greeting followed by an employee taking the order is not voice AI ordering and is excluded.

Wait time:

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

Window time:

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

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