



2026 ANNUAL



On-Premises Study

Evaluating the in-person,
counter-ordering experience

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How Teams Can Use This Report

This benchmark is most useful when it helps different teams move from broad observations to concrete action. The pages that follow are designed to show not just who performed well, but where the biggest guest-experience gaps appear and which teams can act on them.

Operations Leaders

- Spot bottlenecks in speed, accuracy, and cleanliness
- Focus on gaps that impact satisfaction most
- Translate findings into staffing and process changes

Training & Field Coaching

- Reinforce key behaviors: greeting, friendliness, suggestive sell
- Use “friendly vs. neutral” to define execution standards
- Turn misses into clear coaching actions

Marketing & Guest Experience

- Validate if in-store experience matches brand promise
- Identify where service impacts perceived value
- Support CX priorities with external benchmark data

Brand, Franchise, & Insight Team

- Align teams around shared benchmarks
- Separate quick wins from system-level issues
- Pair with VOC + sales data to quantify impact

Definitions

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

Greeting Rate: Shoppers were asked a yes or no question whether they were greeted or acknowledged upon entering the location.

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

Order Experience Satisfaction: Shoppers were asked a single binary question: “Overall, how satisfied were you with the order experience?”. The available answer options were Satisfied or Not Satisfied.

Overall Satisfaction (OSAT): Shoppers were asked a single binary question: “Rate your satisfaction with the level of service you received?”. The available answer options were Satisfied or Not Satisfied.

Parting Remark: Shoppers were asked a yes or no question whether they were given a parting remark before leaving the store.

Satisfaction with Speed of Service: Shoppers who said speed felt ‘As Expected’ or ‘Quicker Than Expected’.

Suggestive Sell: 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?*

Service Time: Amount of time it took the shopper to place their order until they exit the restaurant with their food.

Wait Time: Amount of time from when the shopper enters the restaurant to when they start to place their order.

Total Time: Total amount of time the shopper spent in the restaurant. Time starts when the shopper enters the restaurant and ends once they exit with their food.

About the Study

By evaluating the in-person experience at 10 leading QSR brands, the 2026 On-Premises Study highlights key operational benchmarks and gaps in human connection that directly impact guest satisfaction. It captures essential metrics like friendliness, speed of service, food quality, and overall experience, providing a clear view of how brands are delivering on the fundamentals of customer service. Together, these insights give restaurant operators practical, actionable guidance to turn frontline data into meaningful service improvements.

Brand Evaluated



The Road to the Data

- 753 mystery shops were conducted across 10 leading QSR brands.
- Dayparts were split across Breakfast (n=152), Lunch (n=301), and Dinner (n=300).
- Dunkin' and Starbucks were evaluated during Breakfast only to evaluate their performance during their busiest daypart; the remaining eight brands were evaluated during Lunch and Dinner.

Breakfast:	Lunch:	Dinner:
5am - 10:30am	10:30am - 1:30pm	4pm - 7pm

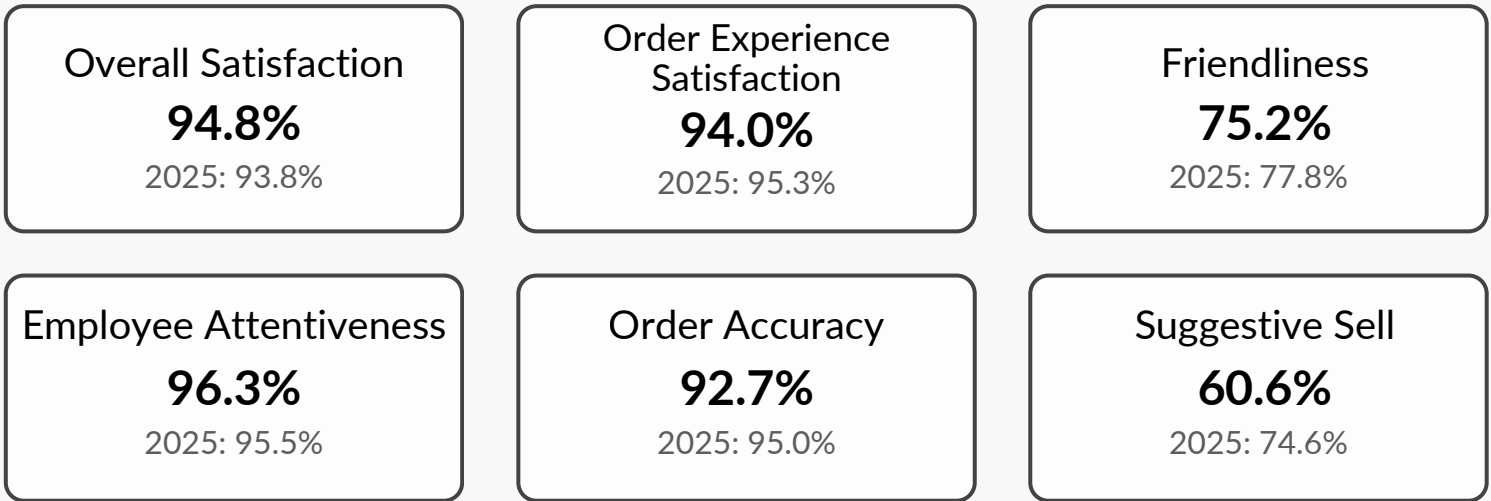
1. Executive Summary & Highlights

The 2026 On-Premises Study reveals a strong baseline across the industry's core operational metrics. Overall Satisfaction reached 94.8% study-wide, reflecting broad positive intent from guests. Order Accuracy came in at 92.7%, but the remaining 7.3% of incorrect orders are disproportionately responsible for dissatisfaction ratings, as explored in [Section 3](#).

The biggest gap identified in this study lies in the human connection metrics: Friendliness (75.2%), Greeting Rate (72.1%), and Parting Remark (72.6%), all trailing the operational metrics by a significant margin. This means roughly one in four guests did not receive a greeting, and one in four did not receive a closing remark. Suggestive Sell, at 60.6%, represents the single largest missed revenue opportunity.

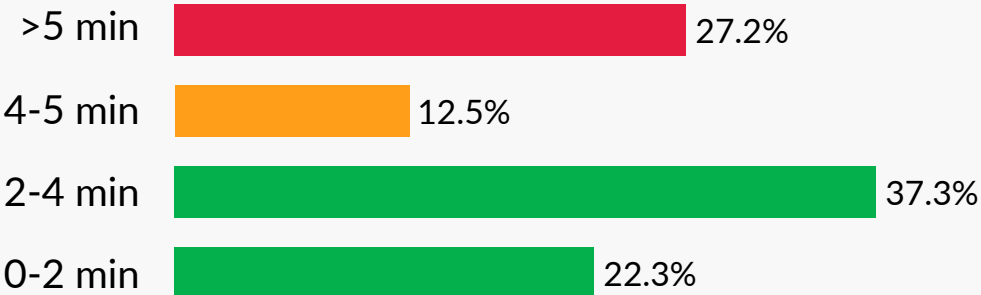


2026 Performance Dashboard



Speed of Service

Service Time



Service Time

04:03

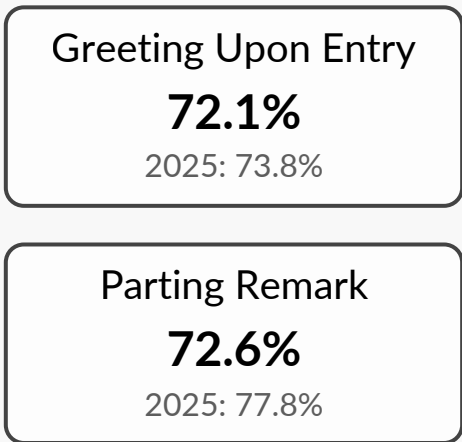
2025: 05:03

Satisfaction with
Speed of Service

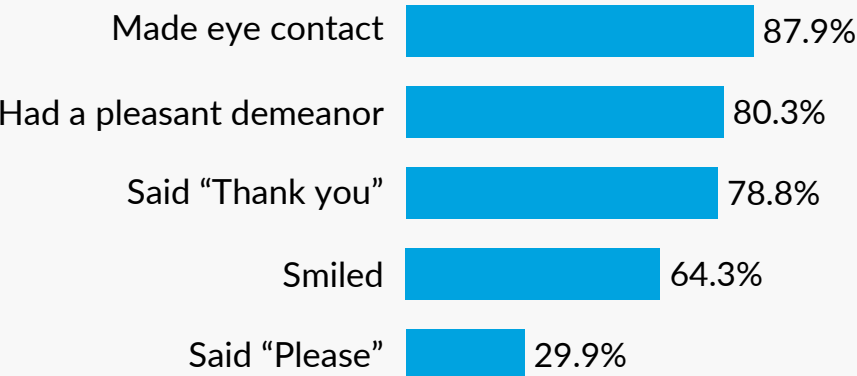
87.9%

2025: 93.0%

Core Service Behaviors



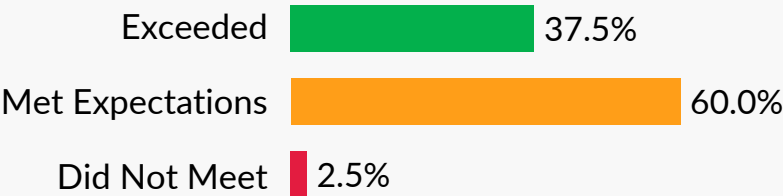
Service Behaviors Exhibited



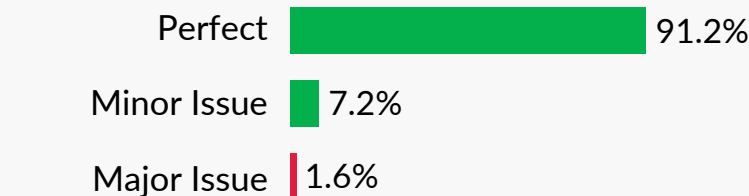
n=753

Quality

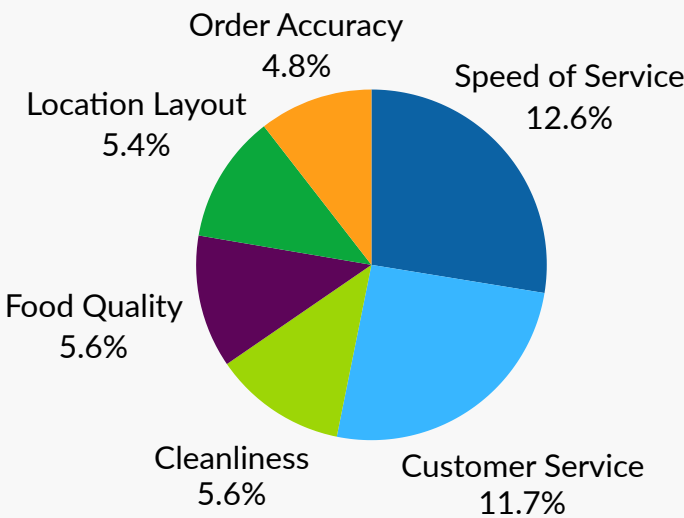
Main Food Item



Beverage Preparation



Top Areas for Improvement



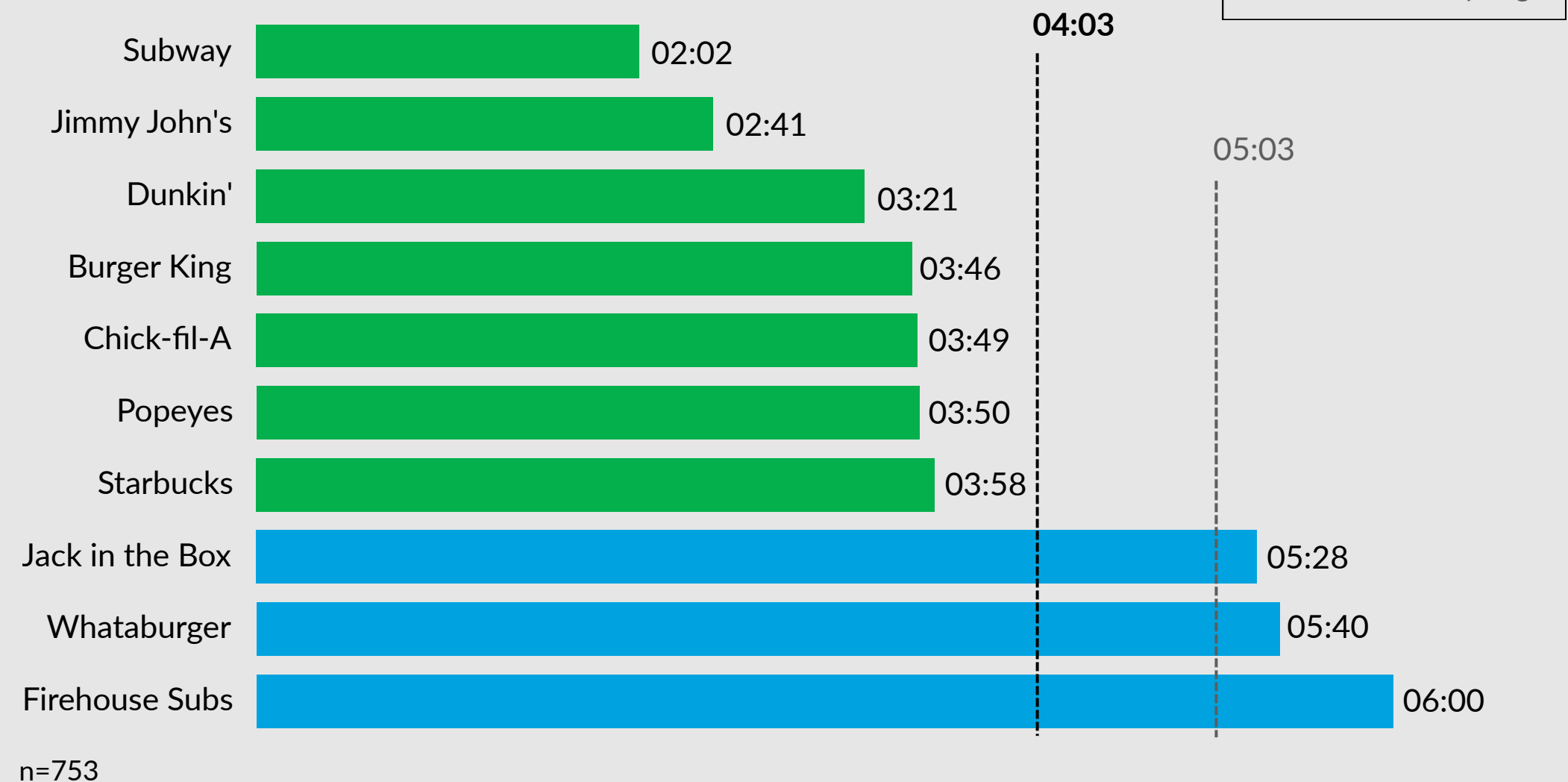
n=344

2. Speed of Service & Throughput

Service time is one of the most operationally controllable drivers of guest satisfaction. The study-wide average service time was 04:03, a **full one minute faster than the 2025 results, which is a huge win for the industry.** The fastest brand in the study was Subway at 02:02, and the slowest was Firehouse Subs at 06:00, a difference of nearly four full minutes.

It's worth noting that the brands with the longest times, also serve more complex or made-to-order menu items. But the key question is whether guests feel that the time investment is worth it. As the data in the [Tipping Point section](#) shows, perception of speed matters as much as actual speed.

2026 Service Time by Brand (Order Placed to Food in Hand)



Why This Matters: Guests can tolerate more complex prep - but not unexplained delay. The operational goal is not only faster execution, but speed that still feels on pace with expectations.

The Tipping Point of Satisfaction

While hospitality is lagging and operational speed remains a primary driver of satisfaction, the study highlights that perception matters as much as the stopwatch. However, data shows that when guests perceived speed as slower than expected, overall satisfaction dropped significantly from 96.7% to 76.9%, regardless of the actual time elapsed, suggesting that a lack of human engagement may make the wait feel longer.

This correlation is the defining finding of this section. Speed itself is not just an operational metric, it is a satisfaction driver. Among guests who identified an area for improvement, Speed of Service was the single most-cited area (12.6% of all shoppers), ahead of Customer Service (11.7%) and all other categories.

Overall Satisfaction Rate by *Perceived* Speed of Service



When orders were rated
'Quicker Than Expected'

OSAT Score:

98.5%

n=753



When orders were rated
'As Expected'

OSAT Score:

96.7%



When orders were rated
'Slower Than Expected'

OSAT Score:

76.9%

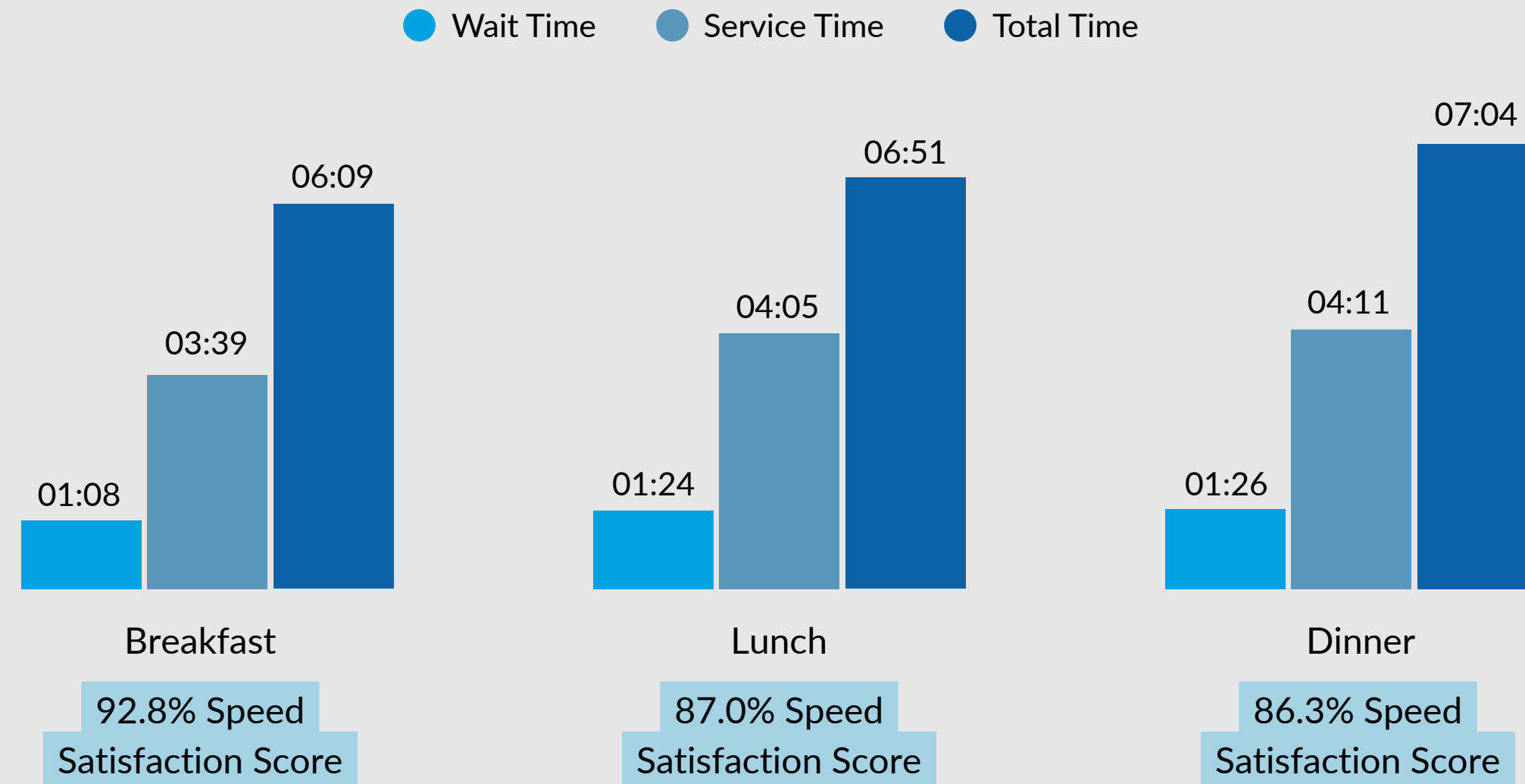


Daypart Bottlenecks

For the 8 brands that were measured during the Lunch and Dinner dayparts, Dinner is the most demanding daypart for throughput. The study-wide average service time at Dinner (04:11) trails Breakfast (03:39) by 32 seconds and outpaces Lunch (04:05) by 6 seconds. When measuring total in-restaurant time, Dinner guests spent an average of 07:04 from entry to exit, nearly a full minute longer than Breakfast guests (06:09).

Note: Dunkin' and Starbucks were exclusively evaluated during Breakfast.

Average Timing by Daypart (mm:ss)



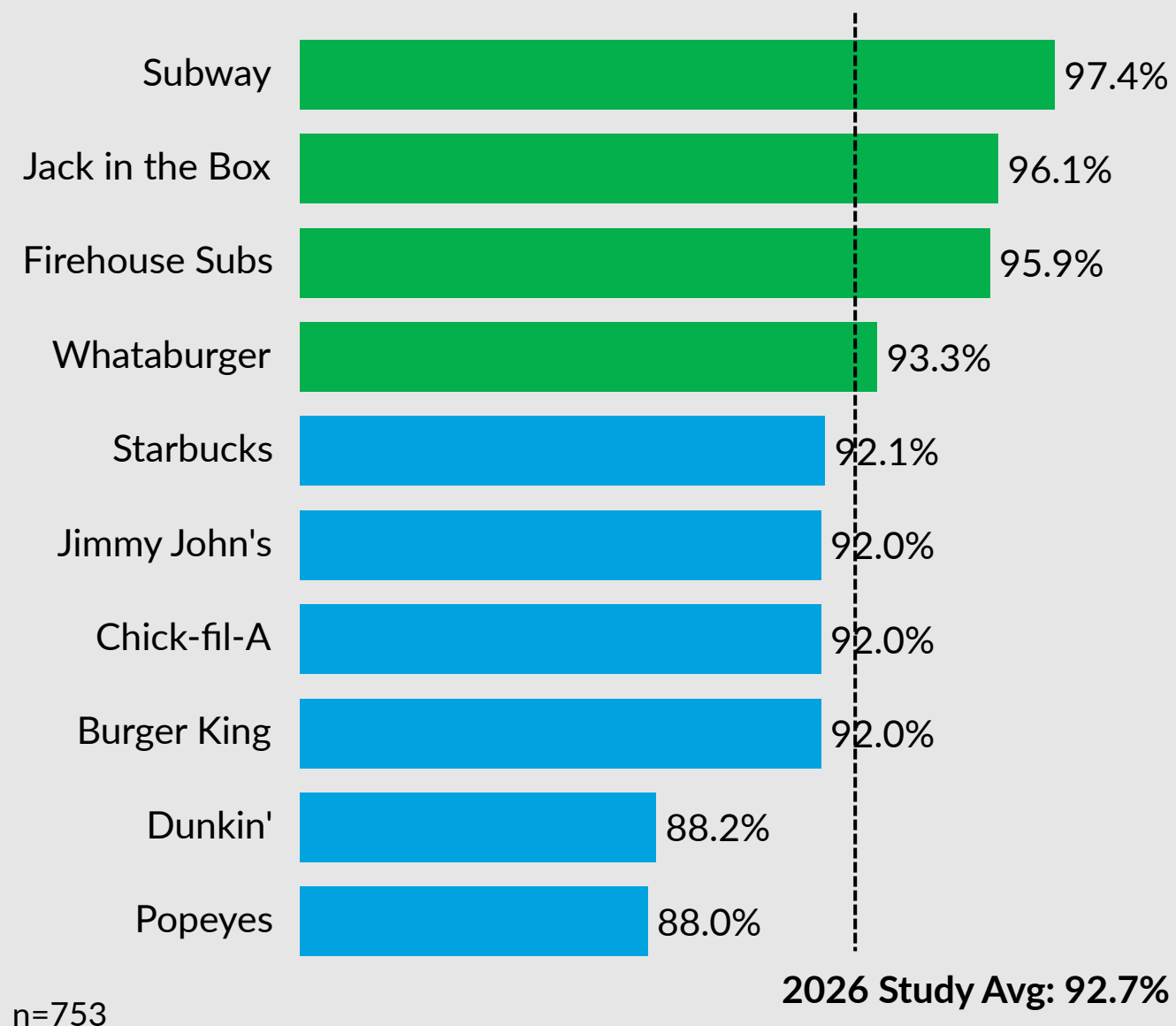
This Dinner deficit is most pronounced among brands like Popeyes, where Dinner service time exceeded Lunch by over 01:12. For brands with significant Dinner volume, staffing, prep, and queue management at peak dinner hours represent the clearest area of operational leverage.

n=753

3. Execution, Accuracy, & Quality

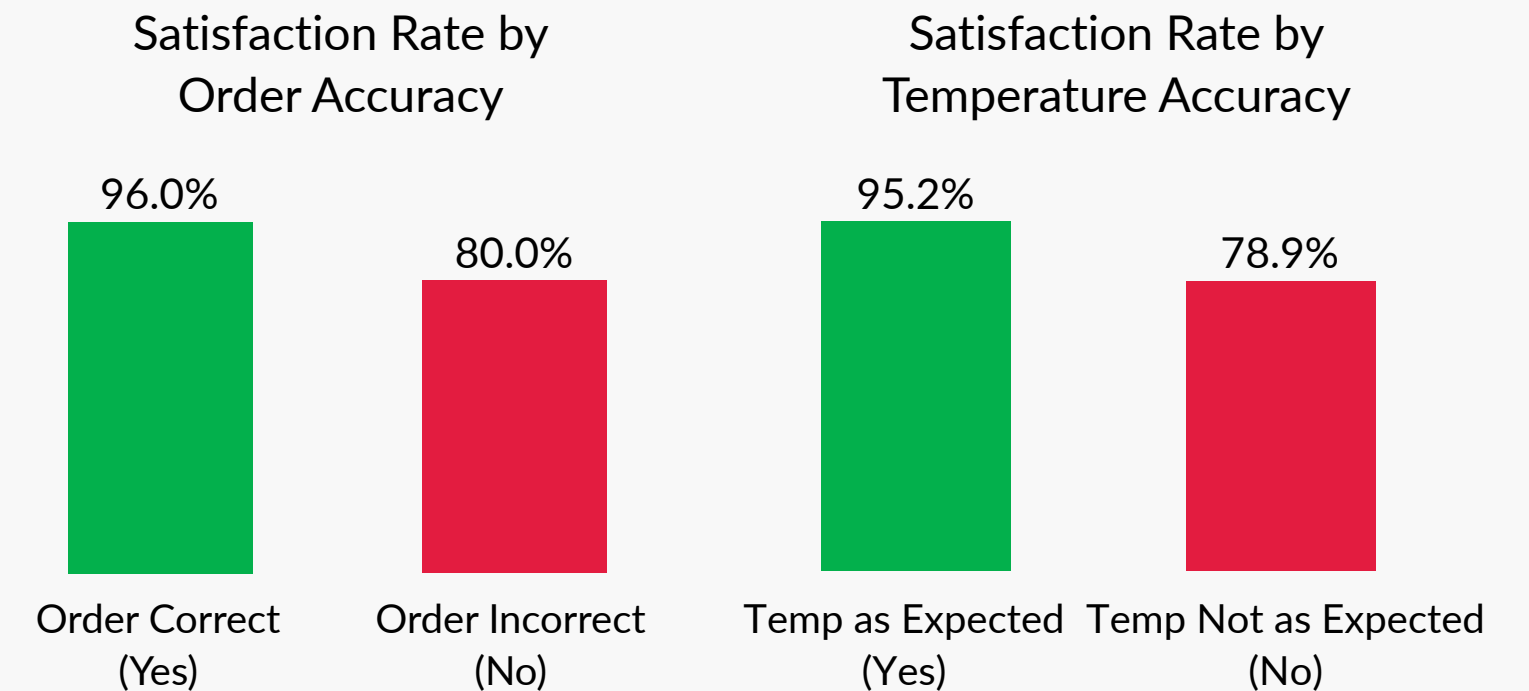
Study-wide Order Accuracy was 92.7%, meaning approximately 1 in 13 orders contained an error, missing item, or incorrectly fulfilled special request.

Order Accuracy Rate by Brand



The data shows a decisive drop in satisfaction when execution fails.

The Cost of Error: How Quality Failures Impact Guest Satisfaction



These numbers make clear that an incorrect or cold order is not a minor inconvenience, it is the primary pathway to a "Not Satisfied" outcome.

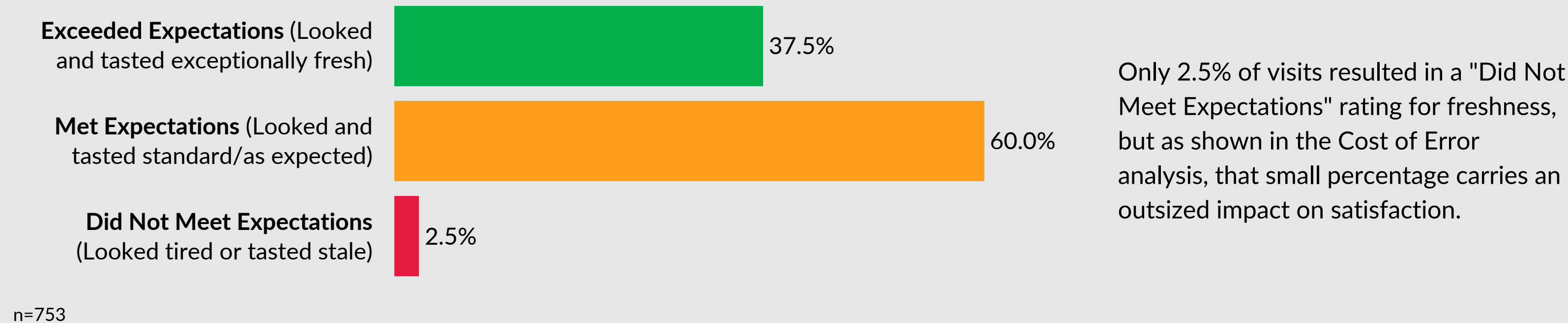
Product Integrity: Temperature & Taste

Product integrity, measured by the quality of the core product, and derived from two areas: Temperature and Taste. This section was strong across the study, with one exception:

- 91.2% of visits rated Perfect in beverage preparation, with 7.2% experiencing a minor flavor issue and 1.6% a major issue
- 97.5% of main entrees were served at the expected temperature
- 97.5% of side items met temperature expectations
- 97.5% of main food items met or exceeded expectations on food freshness (60.0% Met, 37.5% Exceeded)
- 99.1% of beverage temperatures met expectations

Main Food Item Freshness & Appearance (Study-Wide)

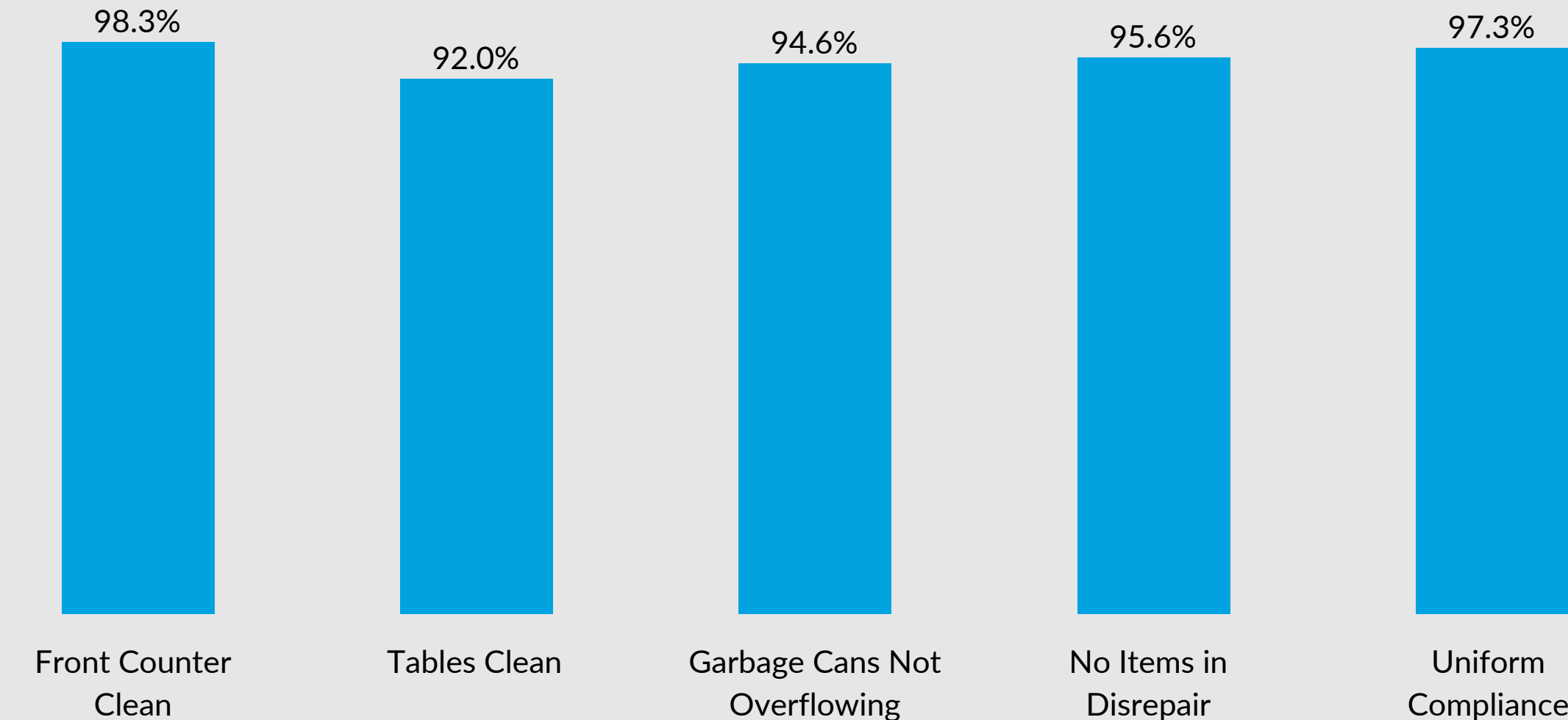
Overall, did the appearance and taste of the main food item seem fresh?



Facility Standards & Brand Pride

Front counter cleanliness, one of the most visible signals of operational discipline, scored extremely well at 98.3%. The more challenging metrics were table cleanliness (92.0%), which signals consistent floor-level maintenance during service hours, and garbage can overflow (41 out of 753 visits had overflowing cans). Items in disrepair were noted in 4.4% of visits.

Facility & Cleanliness Standards (Study-Wide)



n=753



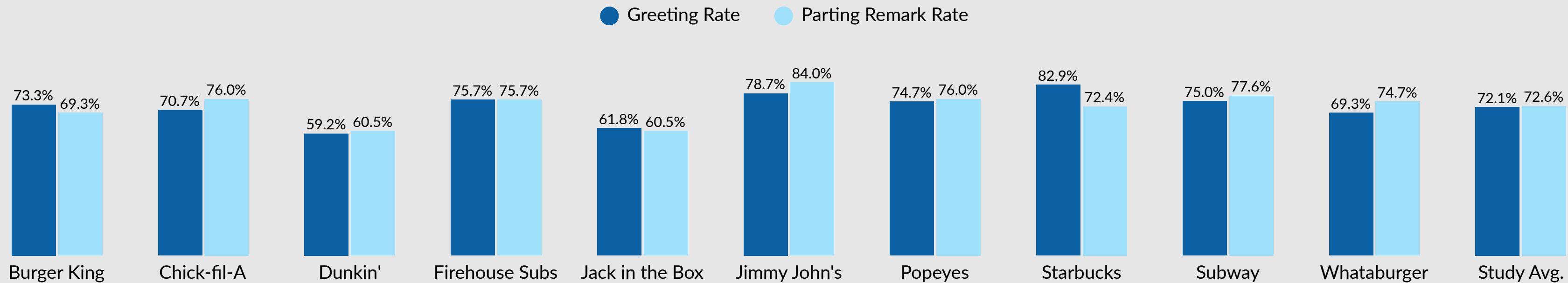
Cleanliness emerged as the #3 most-cited area for improvement across the study (5.6%), tied with Food Quality.

4. Service & The Human Connection

Bookend Strategy: Greetings & Parting Remarks

A greeting and a closing remark are the two most powerful bookends of any counter experience. They require no additional resources, only intention. Yet study-wide, 27.9% of guests were not greeted upon entering, and 27.4% were not given a parting remark before leaving. These gaps are consistent across most brands, suggesting that while the instinct may exist, the habit is not yet embedded.

Bookend Strategy: Greeting & Parting Remark Rates by Brand

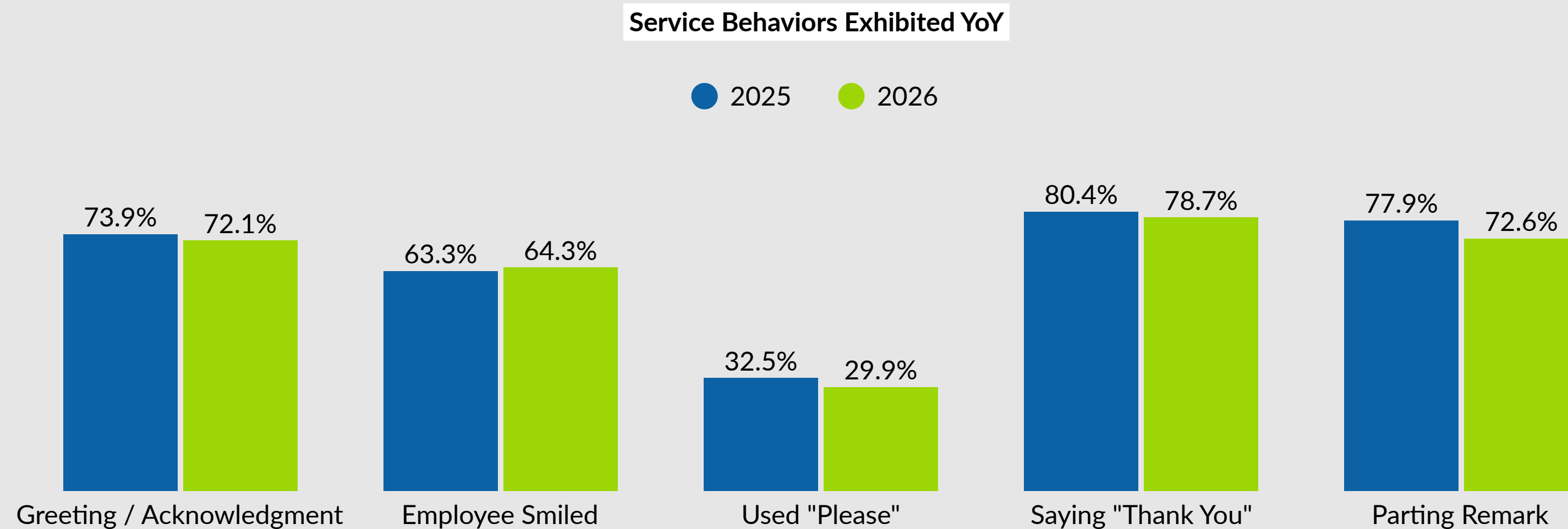


n=753

Among specific employee behaviors observed during the visit, Eye Contact was the most consistently delivered behavior (87.9%), followed by a Pleasant Demeanor (80.3%) and saying "Thank You" (78.8%).

The Widening Transactional Gap (2025 vs. 2026)

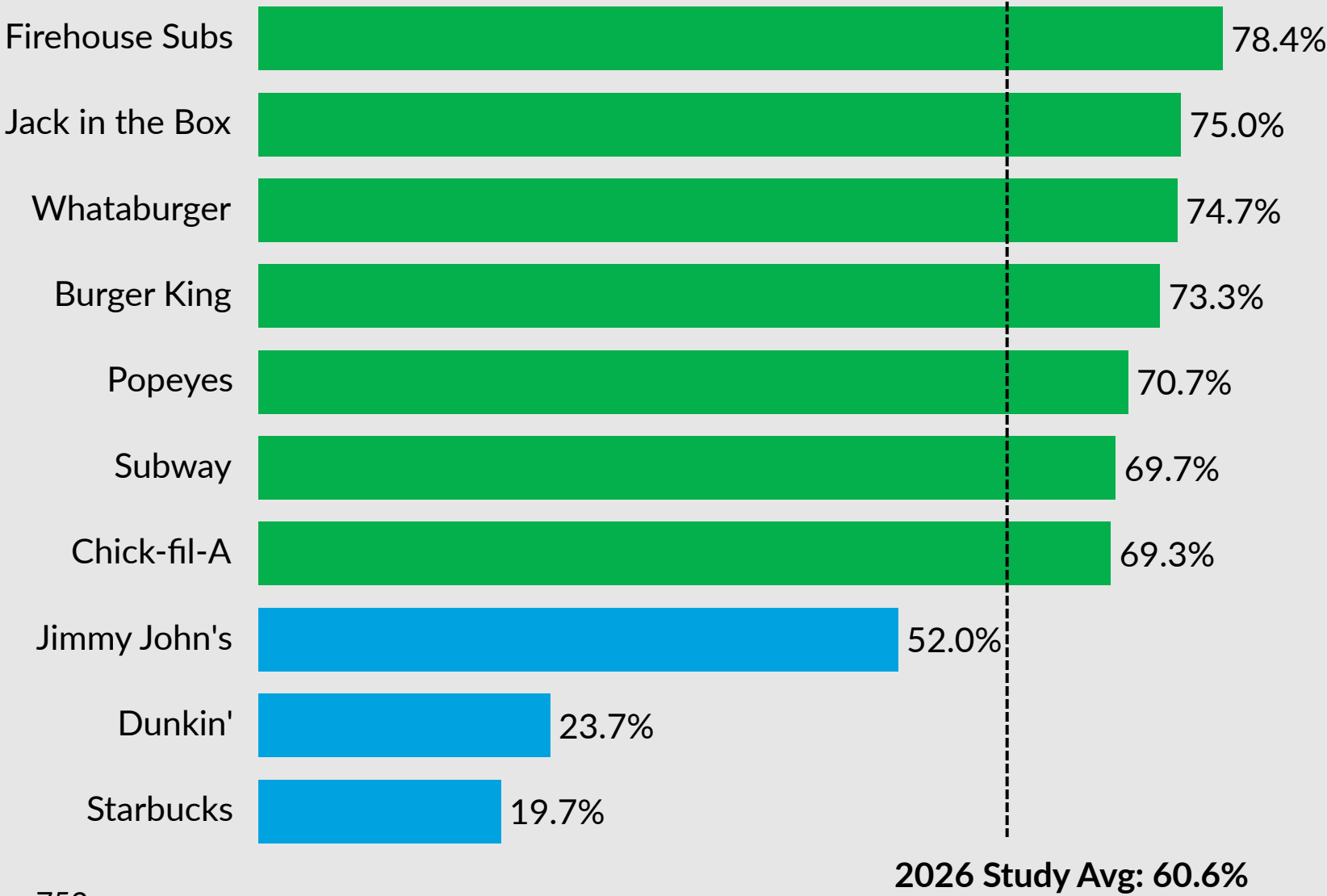
As operational precision reaches new heights, the "Human Element" is in a decline.



The Bottom Line: "Efficiency is expected; hospitality is the differentiator."

Suggestive Sell: The Missed Revenue Lever

Suggestive Sell Rate by Brand



n=753

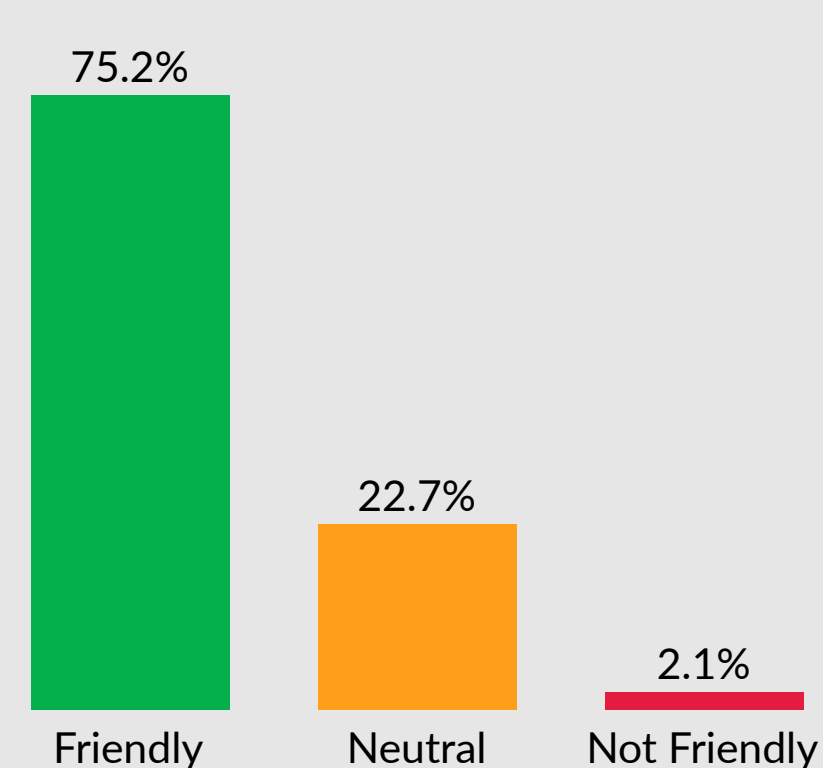
Why This Matters: Even a modest gap in suggestive sell execution becomes measurable revenue at scale. In this study, upselling stands out because it's fast to coach, easy to observe, and relatively inexpensive to improve.

Personalization & Friendliness: Transactional vs. Relational

The Friendly rating (75.2%) and the Neutral rating (22.7%) tell two very different operational stories. A "Friendly" rating corresponds with a 98.9% overall satisfaction rate. A "Neutral" rating, an employee who may be attentive but does not smile or make a human connection, corresponds with only 87.1% satisfaction. Not Friendly visits collapsed satisfaction to 31.2%.

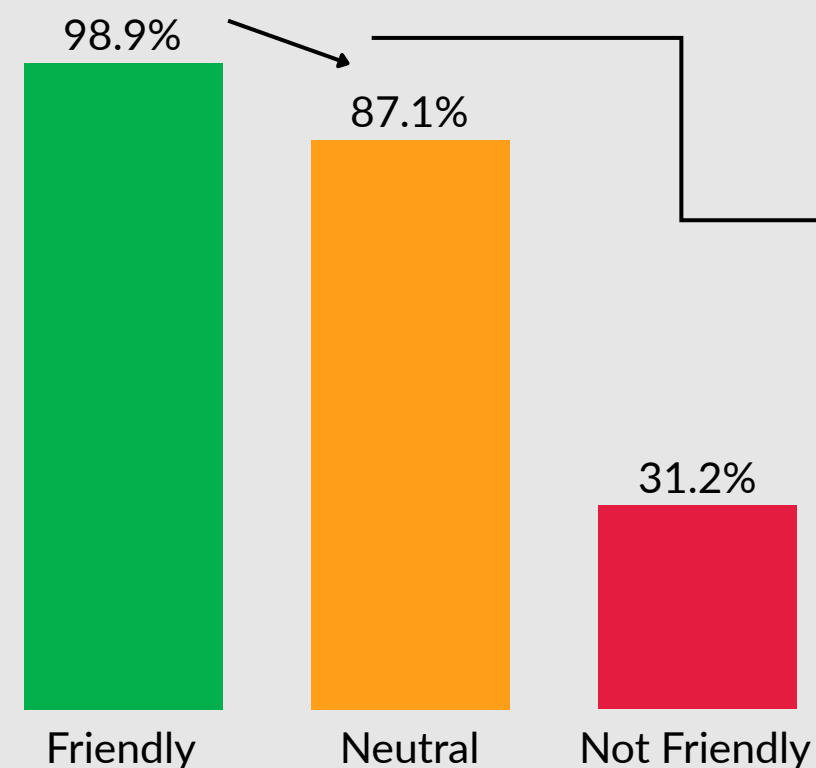
Friendliness: Distribution and Impact on Overall Satisfaction

Friendliness Distribution (Study-Wide)



n=753

Satisfaction Rate by Friendliness Rating



This nearly 12-point gap between Friendly and Neutral confirms the core thesis: a scripted greeting without a smile creates a transactional experience. Attentiveness without warmth is compliance, not service. The behaviors that bridge the gap, a smile, eye contact, and a genuine "Thank you", are the difference between a satisfied guest and a loyal one.

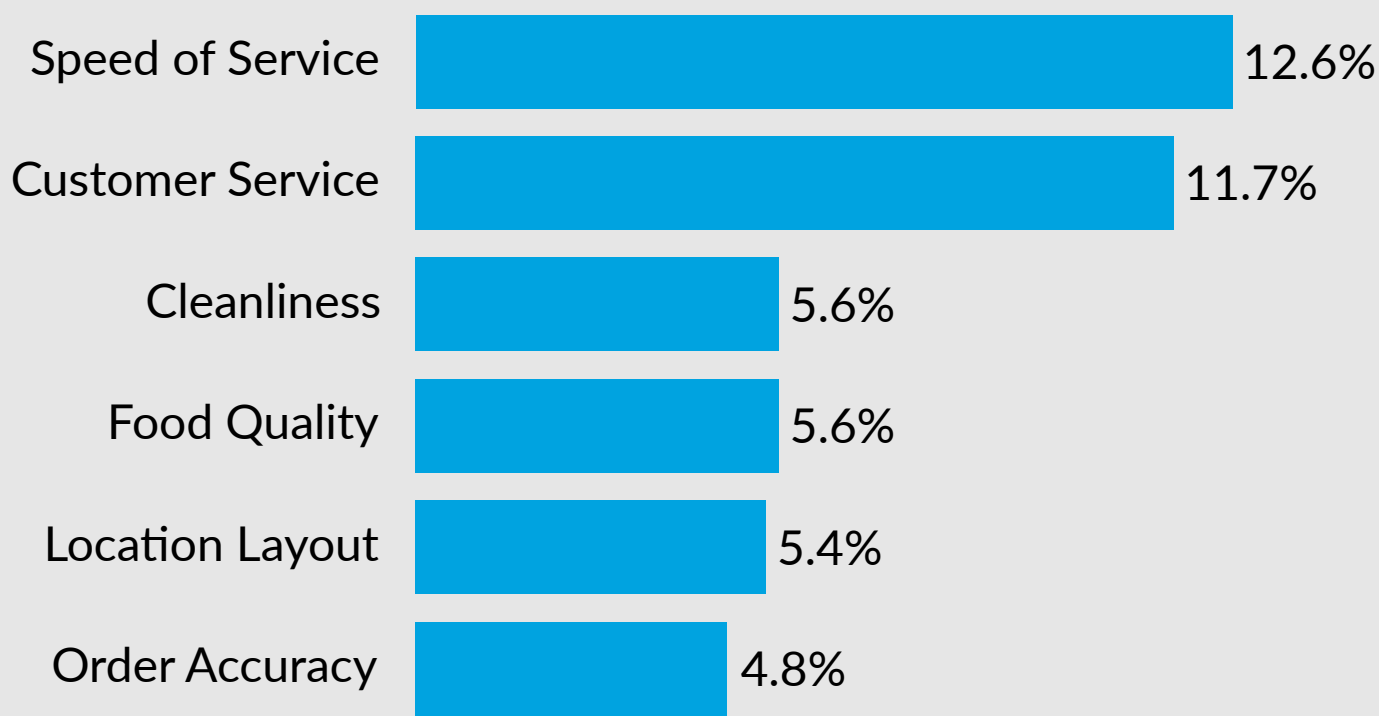
5. Top Areas for Growth

Gap Closure: Top 3 Areas for Improvement

Based on the data, the three most impactful areas for the industry to address in 2026 are:

- 1. Reclaiming the Parting Remark** - Parting Remarks were delivered in only 72.6% of visits. This is the lowest-effort, highest-emotional-impact behavior in the bookend strategy.
- 2. Closing the Dinner Speed Gap** - Dinner is the slowest and least speed-satisfying daypart (86.3% speed satisfaction). Dinner-specific staffing models, prep routines, and line management protocols are the lever.
- 3. Upselling Beyond the 60% Mark** - With the study-wide average sitting at exactly 60.6%, the suggestive sell is at the threshold but not above it.

Top Areas for Improvement cited by shoppers that indicated 'Unsatisfied'



n=344

6. Next Steps with Intouch Insight

While the metrics in this report focus on mystery shopping, a proven methodology for evaluating behavioral compliance, true CX excellence requires a broader perspective.

Intouch Insight's integrated platform bridges the gap between mystery shopping, real-time guest feedback, internal operational checklists, and professional field audits. This allows brands to triangulate structured evaluations against internal compliance and the authentic guest's unfiltered voice. The result is a 360-degree view of the customer experience: what your team is trained to do, what they are actually doing, and how guests feel about it.



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.



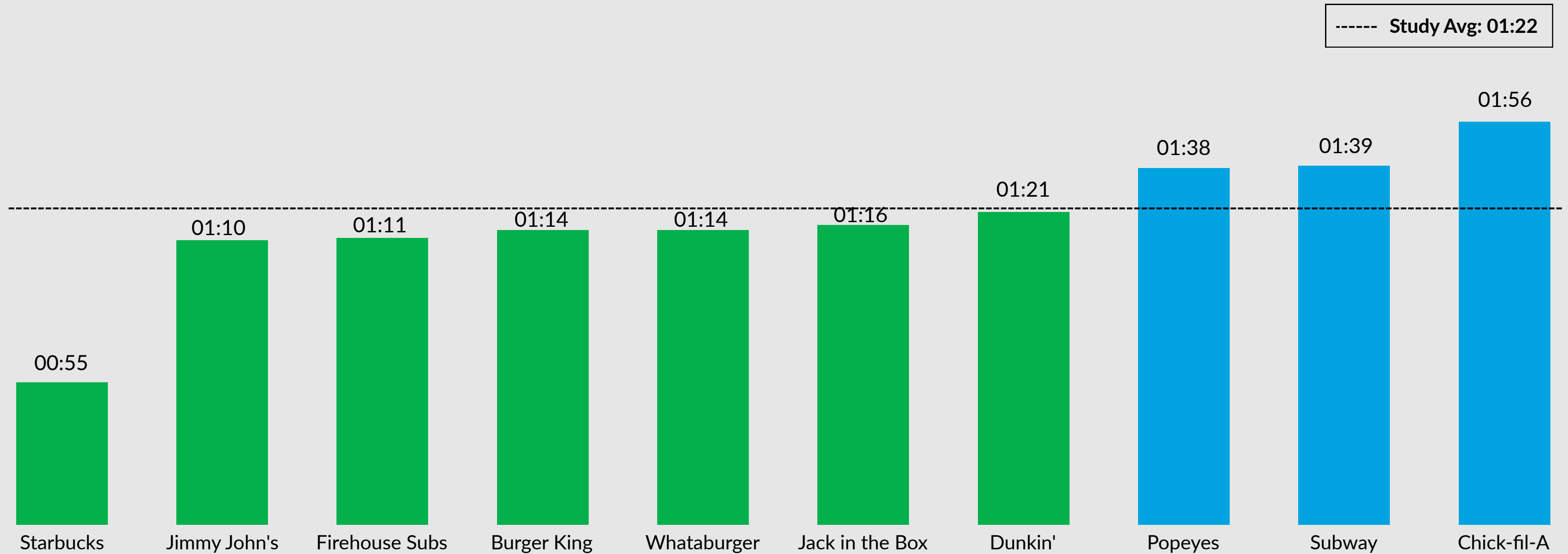
APPENDIX

7. Full Brand Results

The following pages present the brand-level results for the major KPI's in the 2026 On-Premises Study.

Satisfaction & Experience Metrics

Wait Time by Brand (mm:ss)



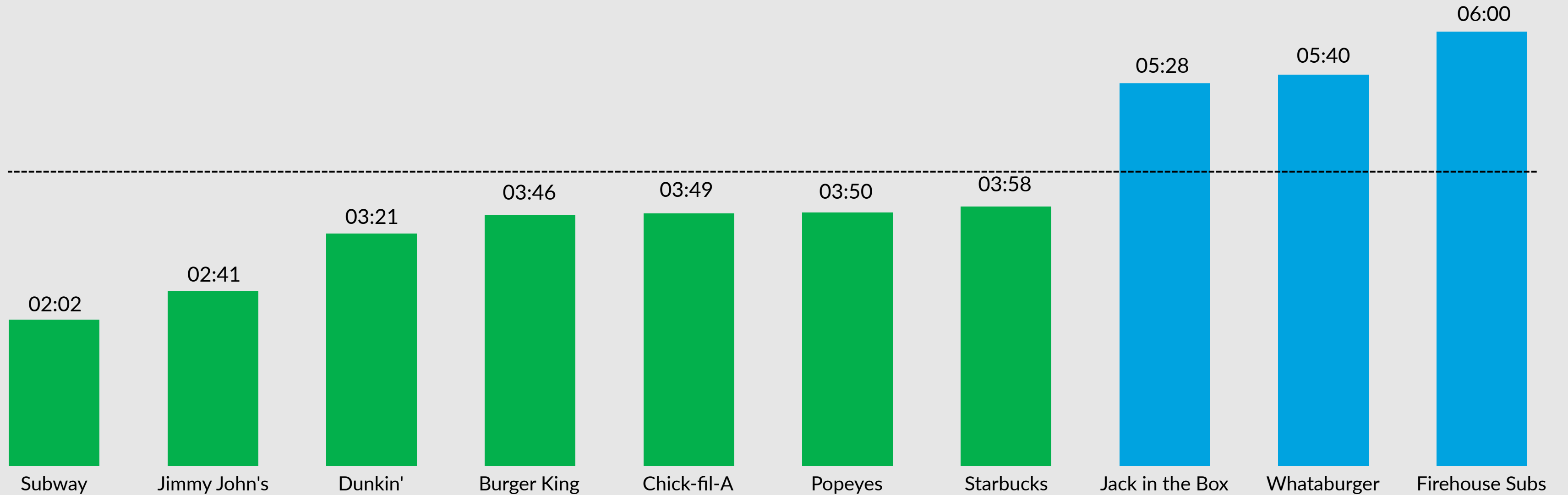
n=753

Wait Time: Amount of time from when the shopper enters the restaurant to when they start to place their order.

Satisfaction & Experience Metrics

Service Time by Brand (mm:ss)

----- Study Avg: 04:03

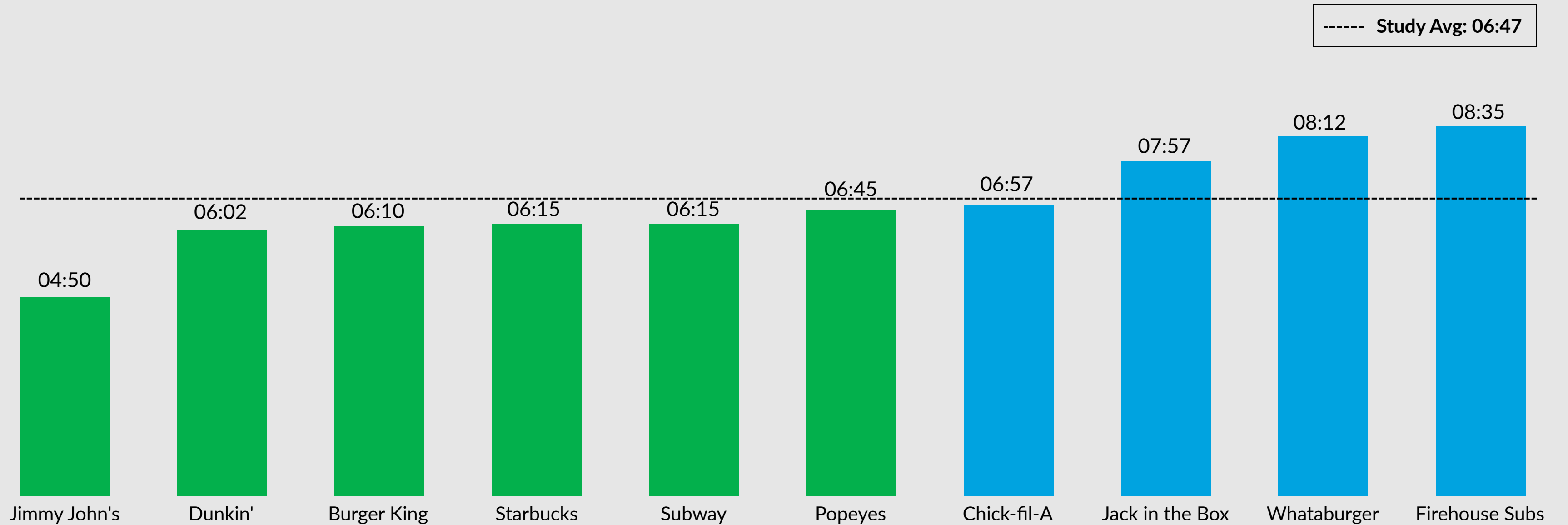


n=753

Service Time: Amount of time it took the shopper to place their order until they exit the restaurant with their food.

Satisfaction & Experience Metrics

Total Time by Brand (mm:ss)

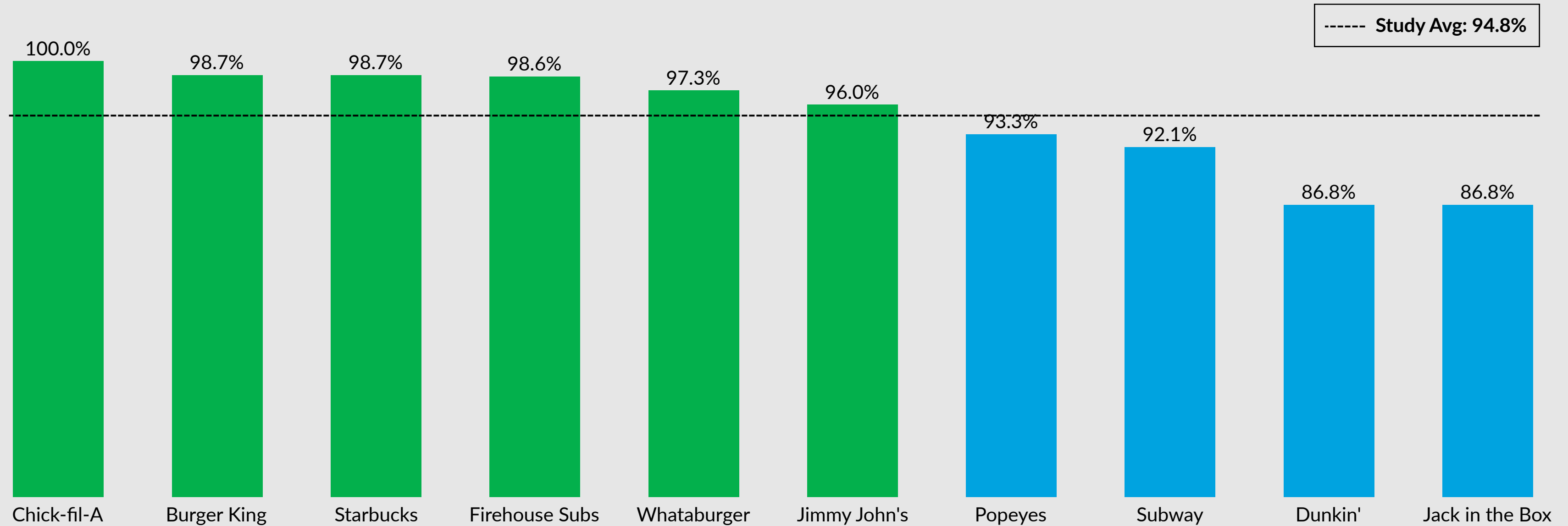


n=753

Total Time: Total amount of time the shopper spent in the restaurant. Time starts when the shopper enters the restaurant and ends once they exit with their food.

Satisfaction & Experience Metrics

Overall Satisfaction by Brand

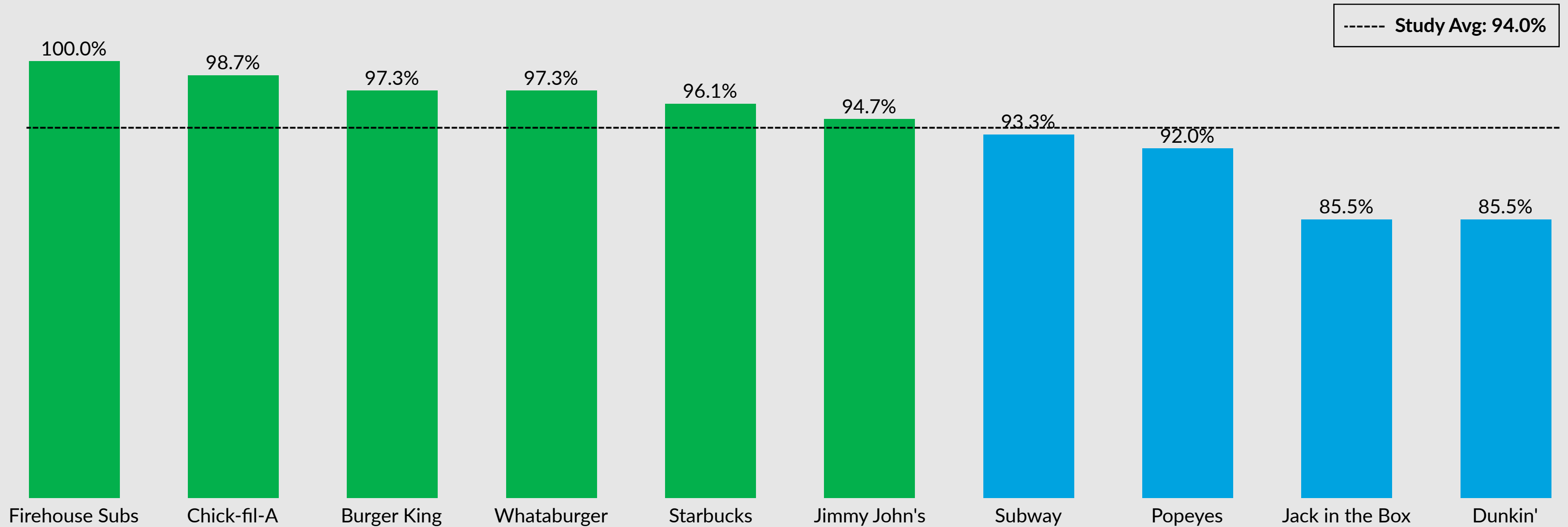


Q: "Rate your satisfaction with the level of service you received." [Satisfied]

n=753

Satisfaction & Experience Metrics

Order Experience Satisfaction by Brand



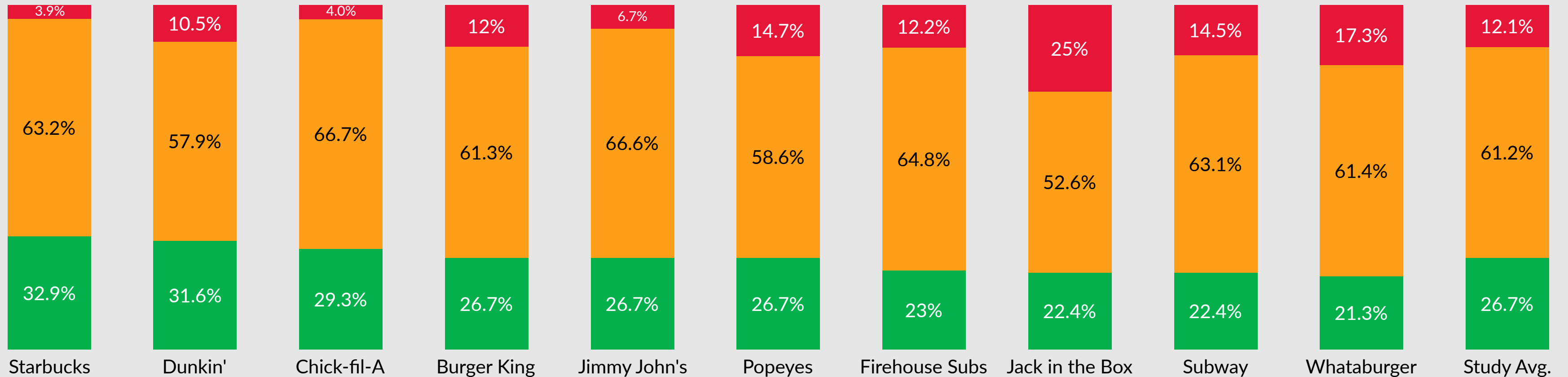
Q: "Overall, how satisfied were you with the order experience?" [Satisfied]

n=753

Satisfaction & Experience Metrics

Perception of Speed of Service by Brand

● Quicker Than Expected
 ● As Expected
 ● Slower Than Expected

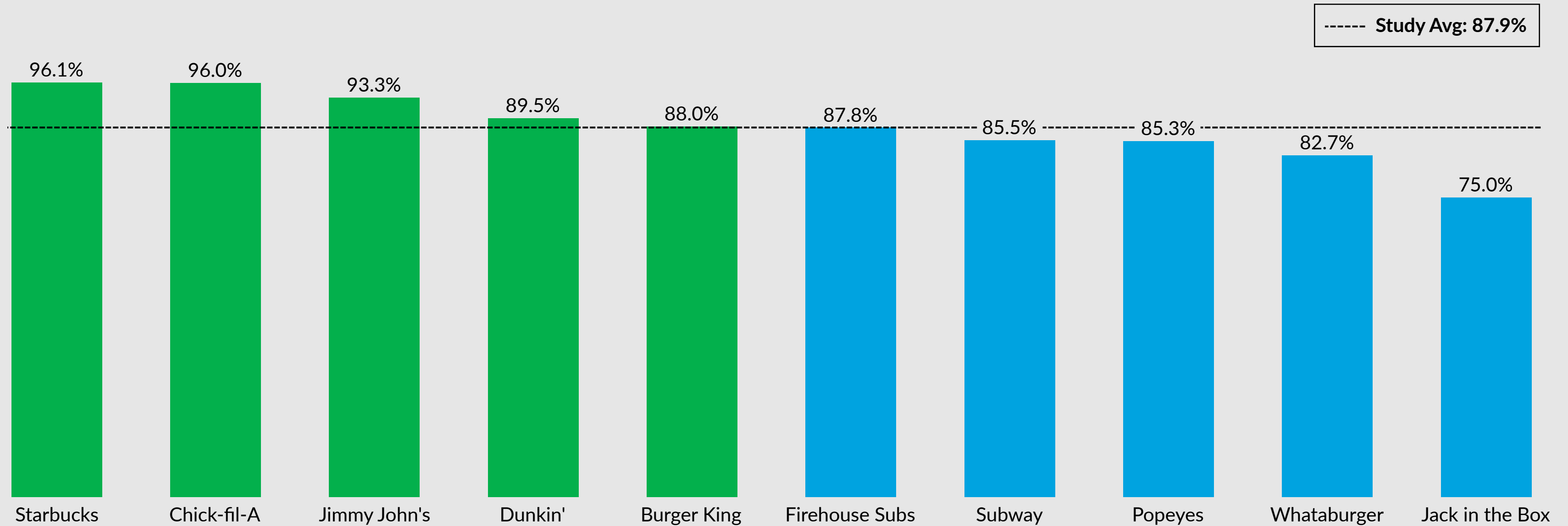


Q: When thinking about the “speed” of your order, was it: (Quicker than expected, As expected, Slower than expected)

n=753

Satisfaction & Experience Metrics

Satisfaction with Speed of Service by Brand

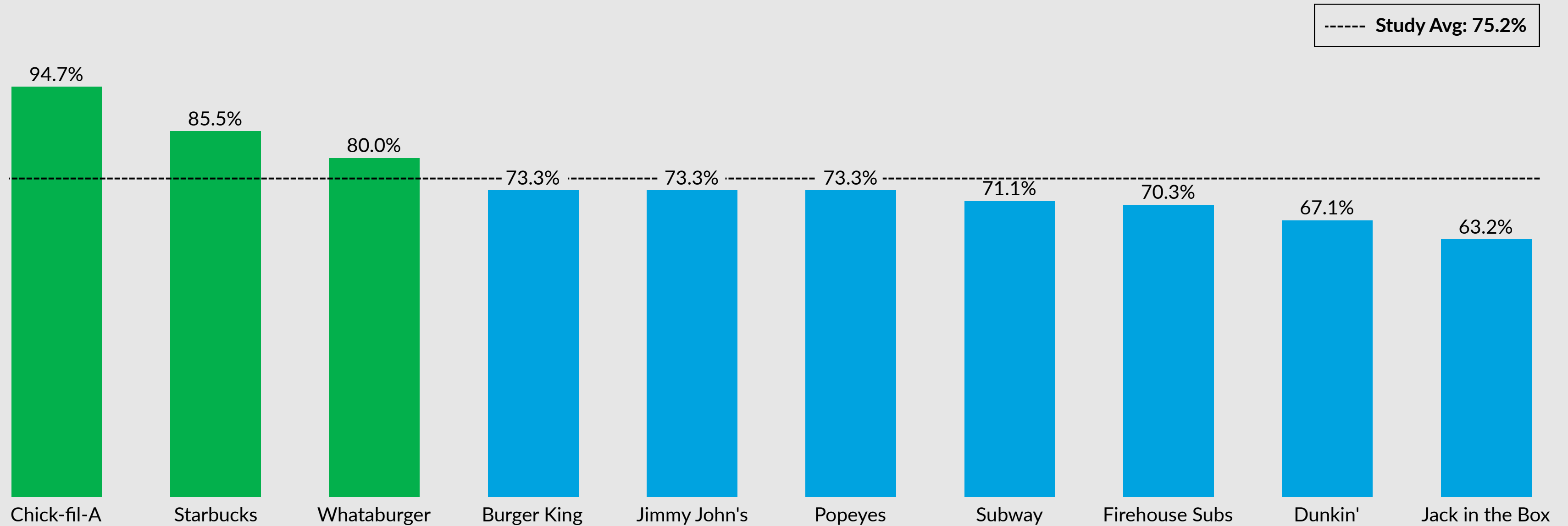


Q: "When thinking about the "speed" of your overall experience, was it:" [As expected + Quicker than expected]

n=753

Service & Behavioral Metrics

Friendliness by Brand

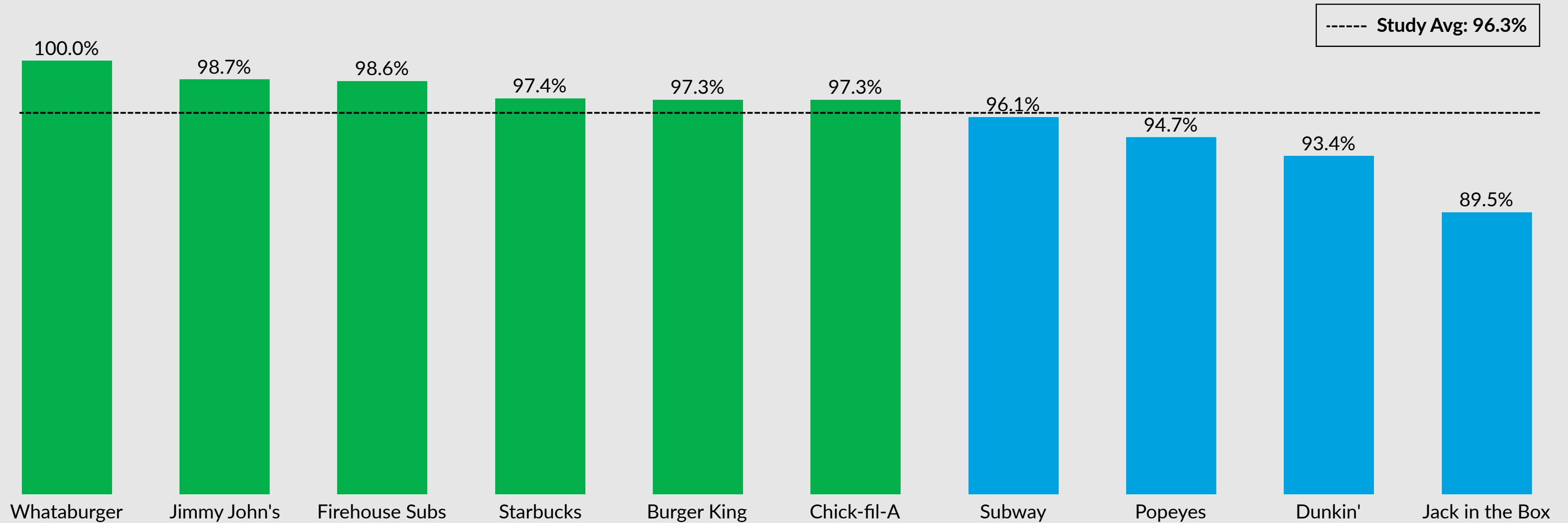


Q: "Overall, how would you rate the service you received on this visit?" [Friendly]

n=753

Service & Behavioral Metrics

Employee Attentiveness by Brand

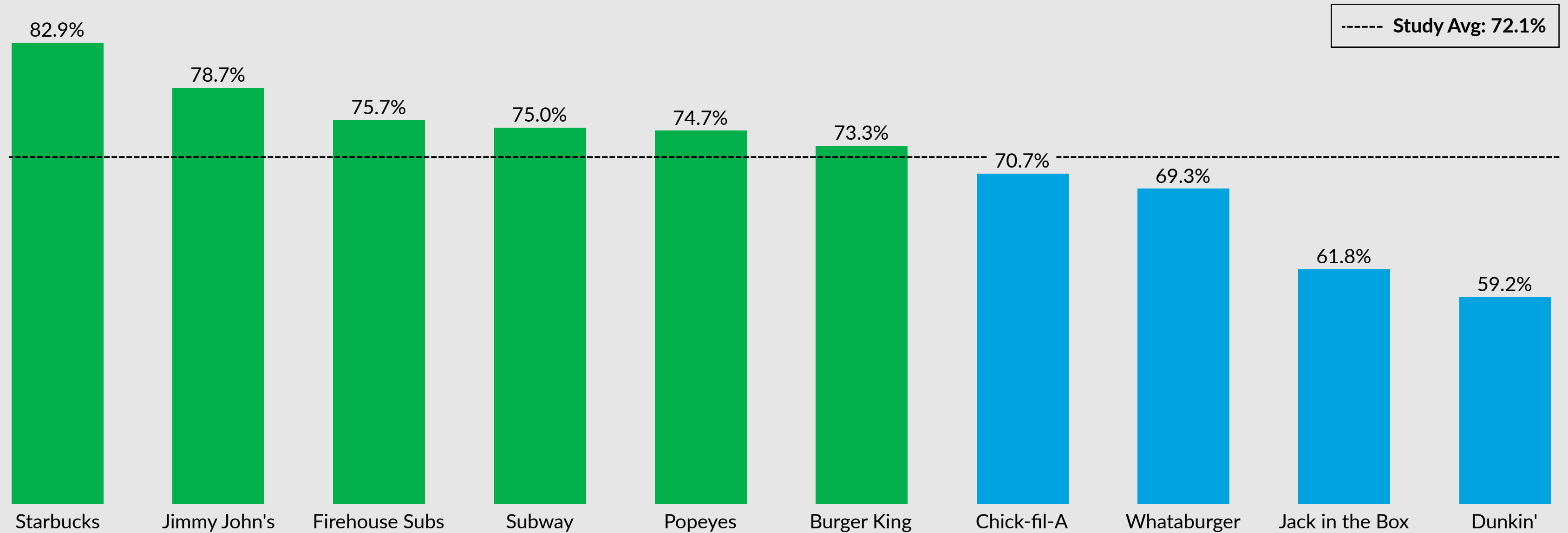


Q: "Was the staff member that served you attentive during your interaction?" [Yes]

n=753

Service & Behavioral Metrics

Greeting Rate by Brand

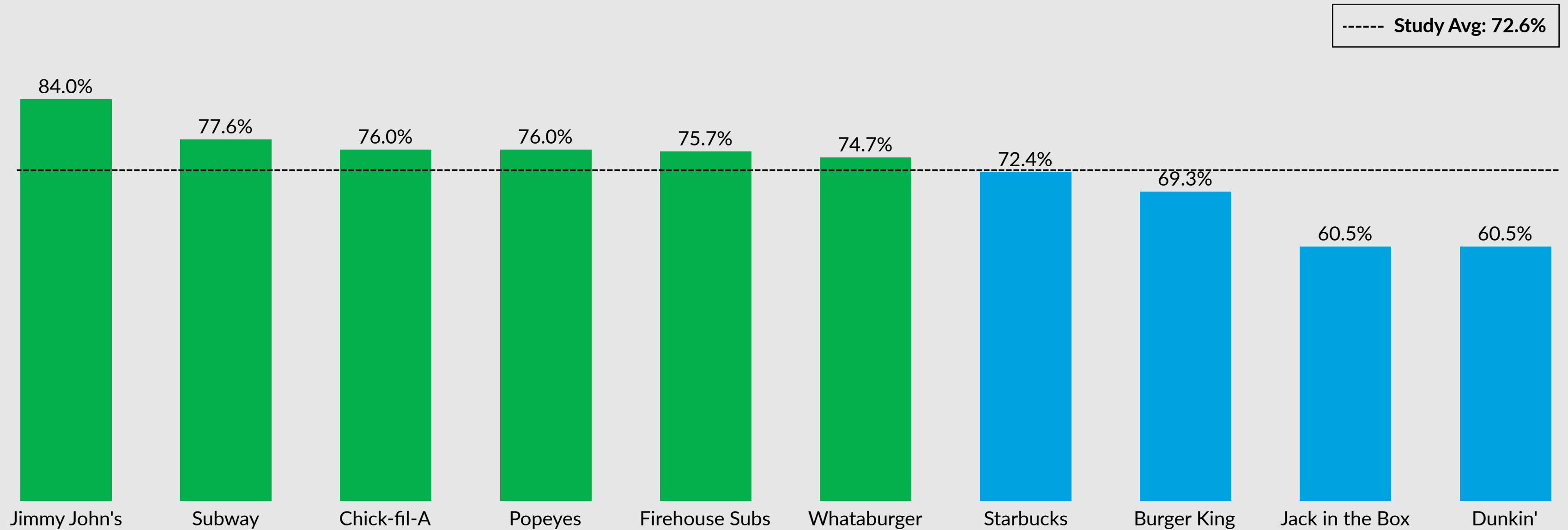


Q: "Were you greeted or acknowledged upon entering the locations?" [Yes]

n=753

Service & Behavioral Metrics

Parting Remark by Brand

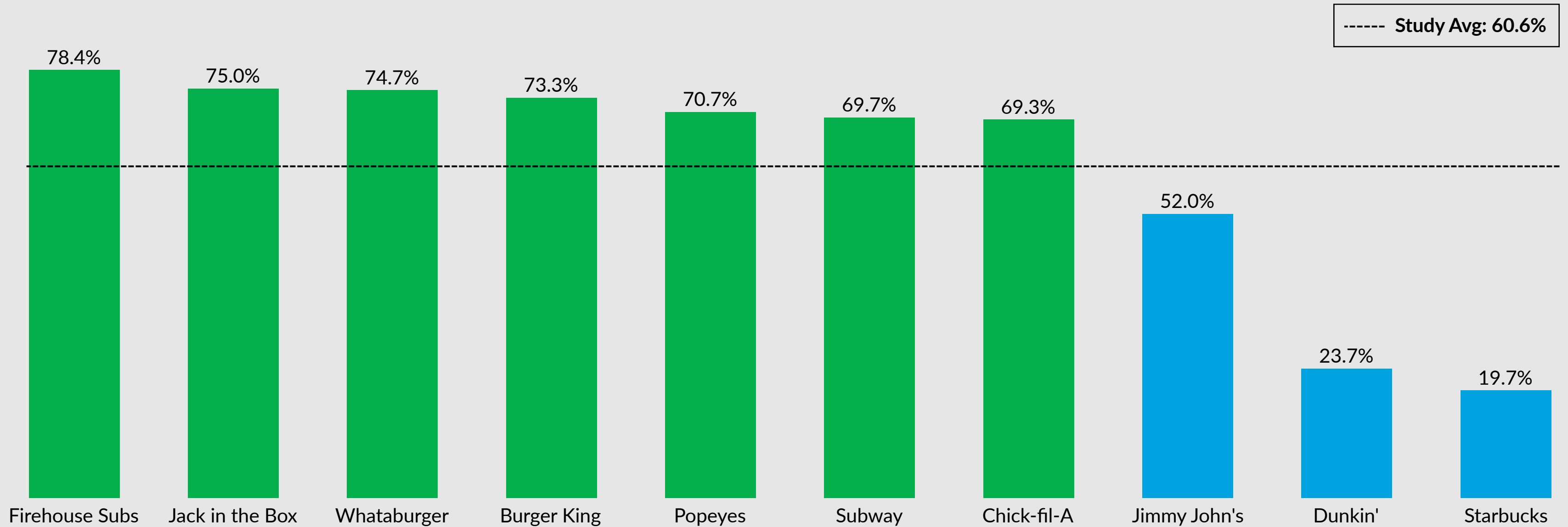


Q: "Were you given a parting remark before leaving the store?" [Yes]

n=753

Service & Behavioral Metrics

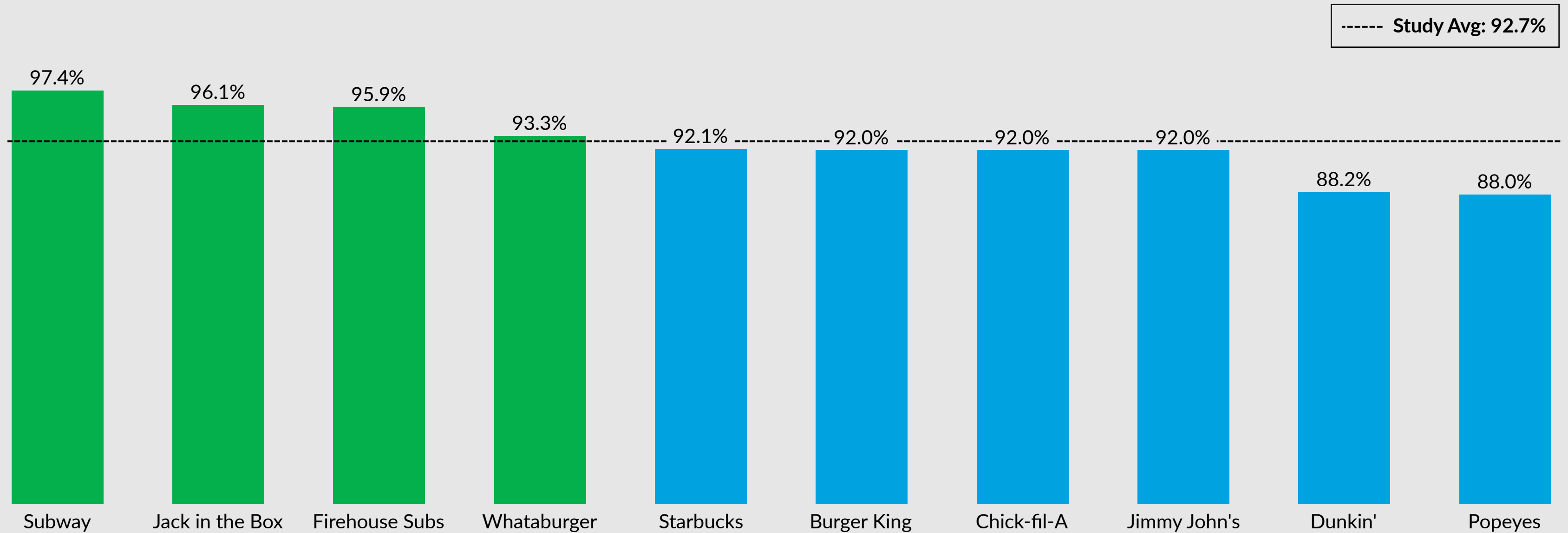
Suggestive Sell by Brand



Q: "Was a suggestive sell offered at any time during the visit?" [Yes]

n=753

Order Accuracy & Execution

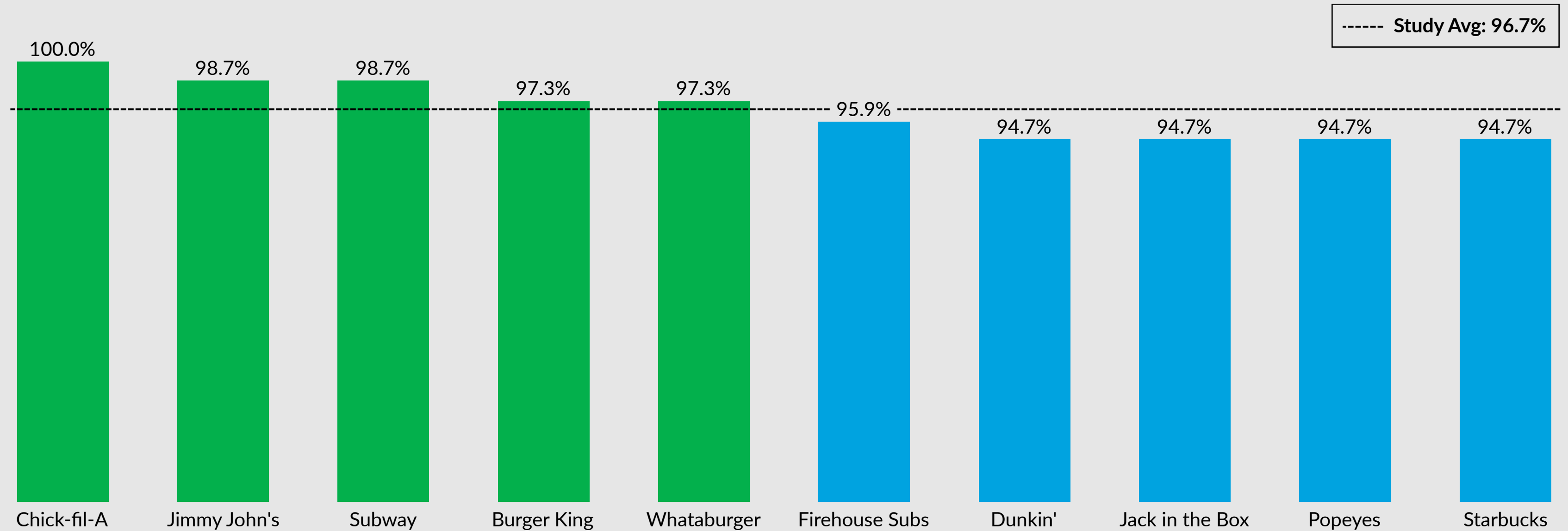


Q: "Was your order filled correctly and completely (including special requests)?" [Yes]

n=753

Food & Beverage Quality Metrics

Main Entree Taste by Brand

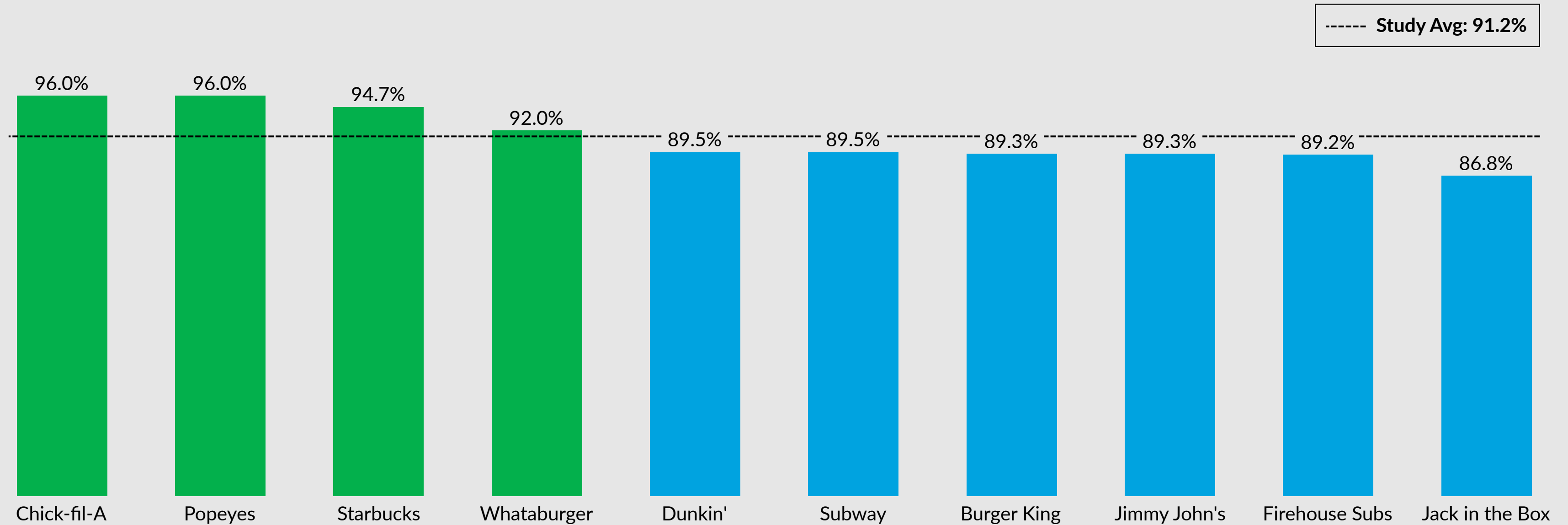


Q: "Was the taste of the main entree as expected?" [Yes]

n=753

Food & Beverage Quality Metrics

Beverage Preparation (Perfect)



Q: "With regards to the preparation of your beverage, rate the mix and flavor:" [Perfect: The drink had the correct flavor and was balanced (e.g., correct syrup, crisp carbonation).]

n=753