

2021 Annual DRIVE THRU STUDY



Purchase the
Full 2021 Report

2021DriveThruStudy@seelevelhx.com

PRESENTED BY

See
Level HX

21st Annual **DRIVE THRU STUDY**

Purchase the results of the study and receive:

- Overview of Study Findings
- Raw data file in Excel
- One-on-one presentation of findings
- Access to online reporting portal with detailed summary reports
- Your Brand questions answered by SeeLevel HX experts



Complete Study Findings Include:

Speed of Service

Broken down by Wait Time, Service Time, and Total Time

- By Brand
- By Menu – Burgers, Chicken, Specialty, Wide Variety
- By Car
- Time of Day
- Region
- With / without PSM
- With / without OCB
- With / without Digital Menu Board
- Accurate vs Inaccurate Orders
- With / without Suggestive Selling



Order Accuracy

- By Brand
- By Menu – Burgers, Chicken, Specialty, Wide Variety
- By Wait Time / Service Time / Total Time
- By Speaker Clarity
- With / without OCB
- With / without Digital Menu Board
- With / without Suggestive Selling
- Friendly / Not Friendly



Food Quality

- By Brand
- By Menu – Burgers, Chicken, Specialty, Wide Variety
 - By Main Entrée
 - By Side Item
 - By Drink
- Temperature
- Time of Day
- By Wait Time / Service Time / Total Time
- Region
- By Satisfaction Level



Customer Service

- By Brand
- By Region
- By Menu – Burgers, Chicken, Specialty, Wide Variety
- By Friendliness
- By Speaker Clarity
- By Masks
- By Cleanliness



Other

- Covid-19 Effects
- Dine In Availability
- Suggestive Selling
- Payment Types Accepted



Methodology

10 Brands



DUNKIN'



Hardee's



1492

Drive Thru
Shops



Geographically
Distributed



Timeline:
July – Early August
2021



Breakfast
12%



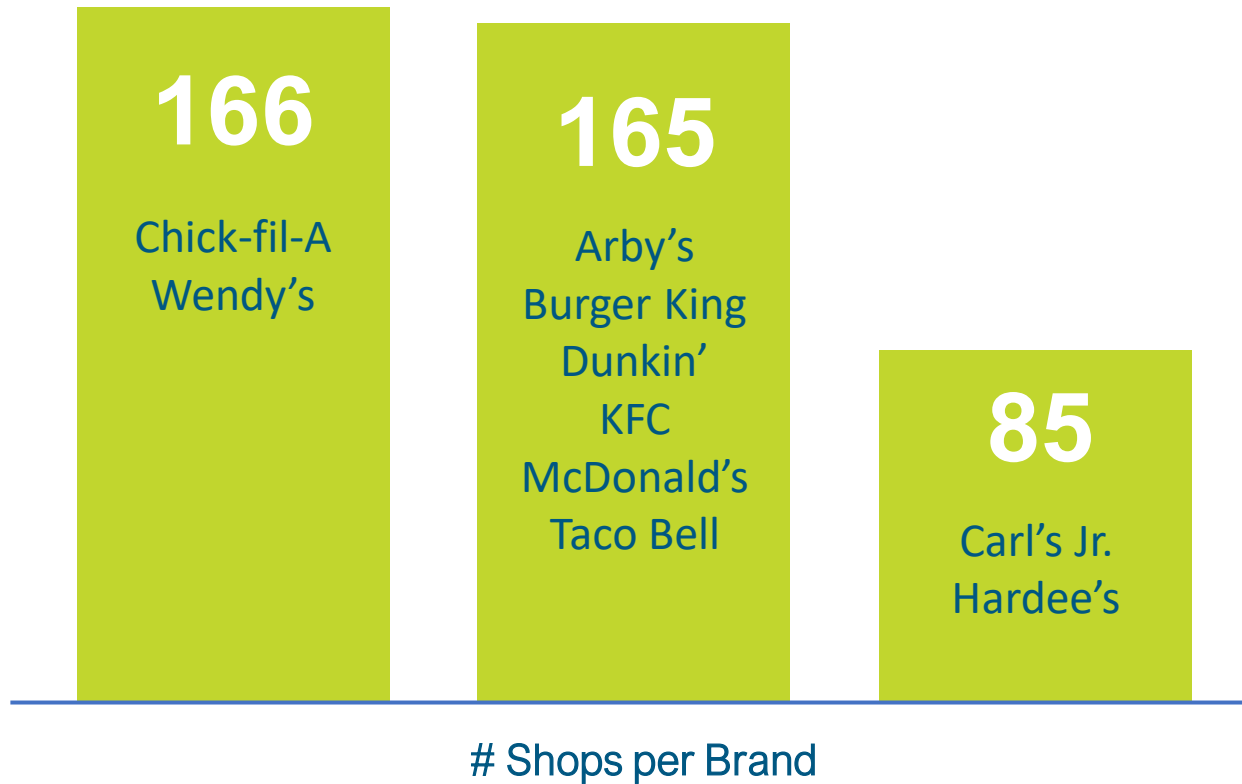
Lunch
60%



Dinner
29%

Order: Hot Sandwich, Side Item, Drink, Special Request

Methodology



Speed of Service



Full report includes:

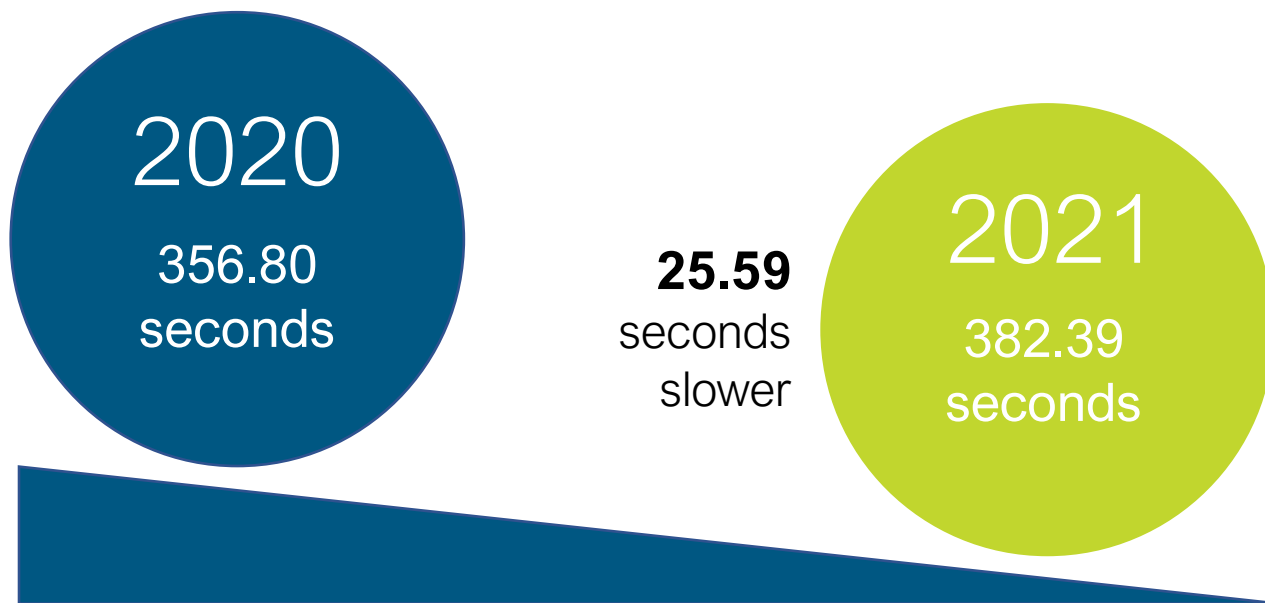
Broken down by Wait Time, Service Time, and Total Time

- By Brand
- By Menu – Burgers, Chicken, Specialty, Wide Variety
- Per Car
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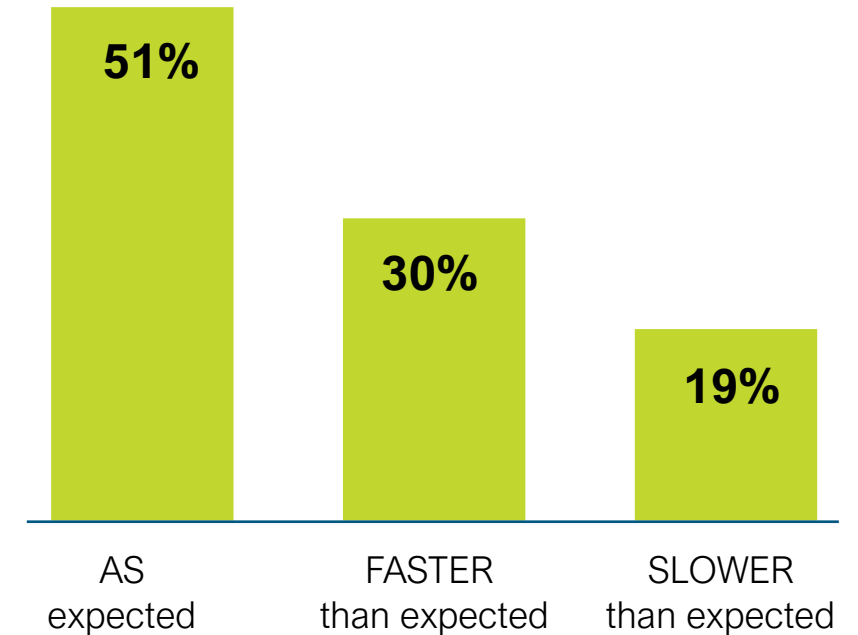
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Speed of Service

Average Total Time 25.59 seconds
slower in 2021 vs 2020

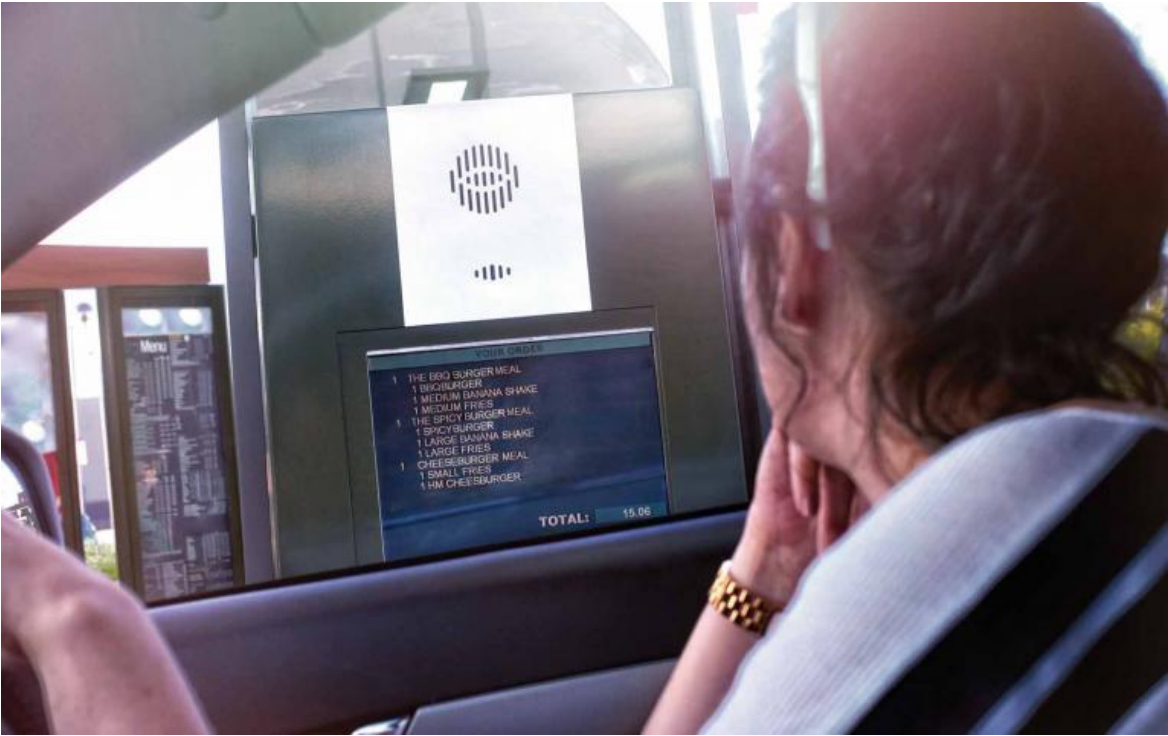
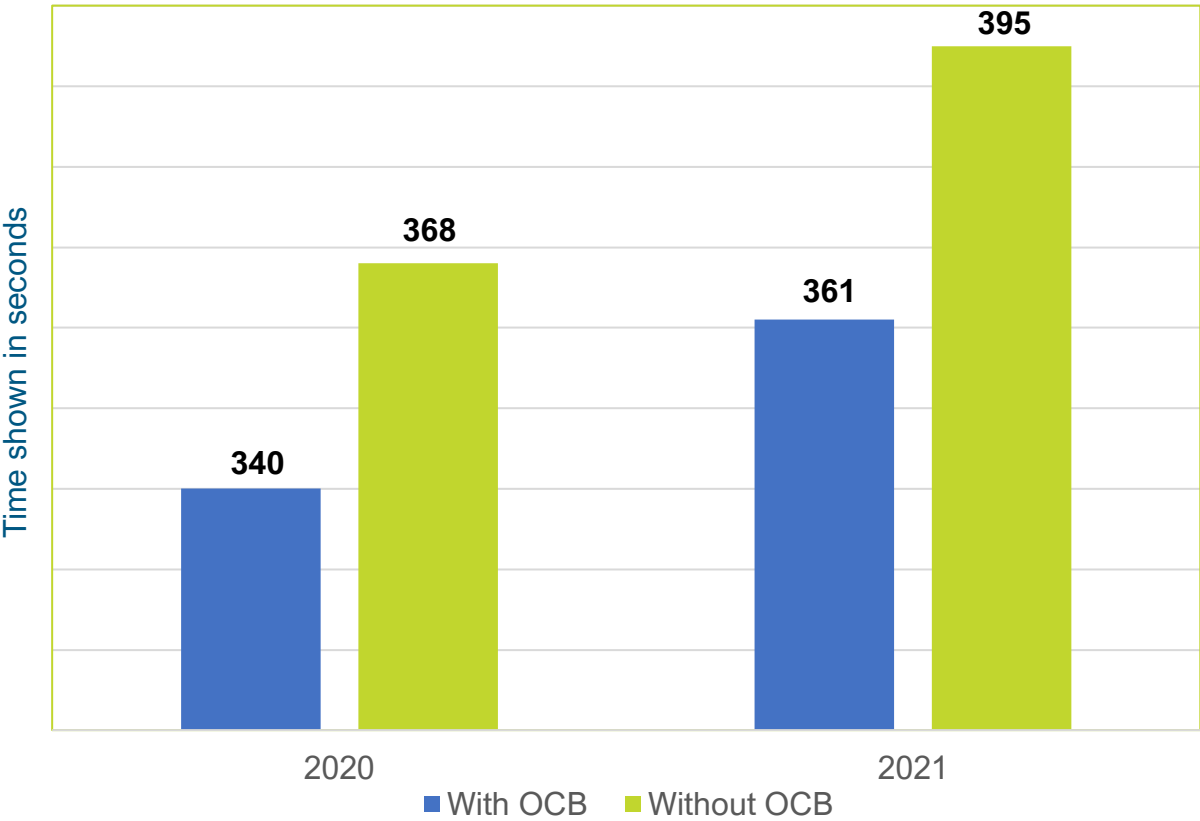


When thinking about the "speed" that your order was delivered, ***please rate your experience.***



Speed of Service: OCBs

Overall Effect of OCBs on Total Time



2021: Restaurants with OCBs deliver 34 seconds faster on Total Time on average
2020: Restaurants with OCBs deliver 28 seconds faster on Total Time on average

Order Accuracy



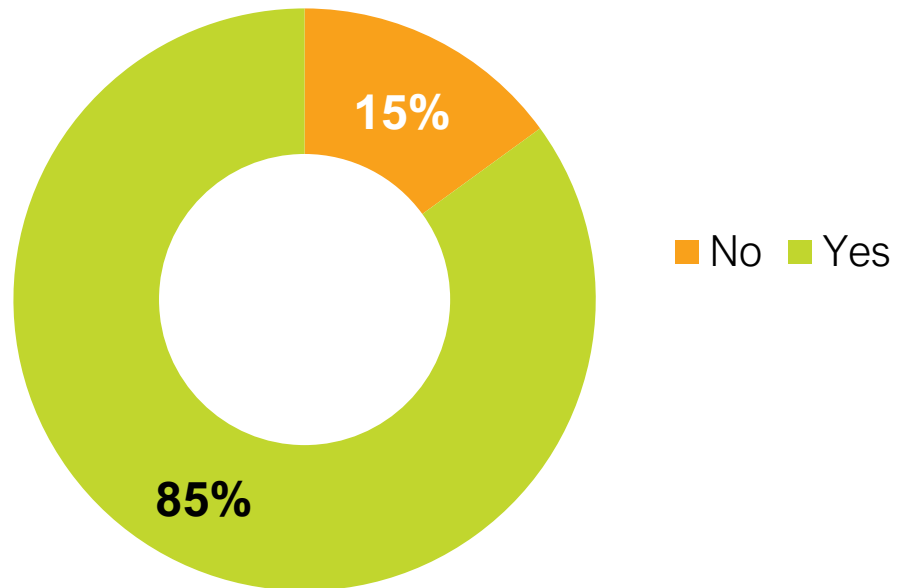
Full report includes:

- By Brand
- By Menu – Burgers, Chicken, Specialty, Wide Variety
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- Friendly / Not Friendly

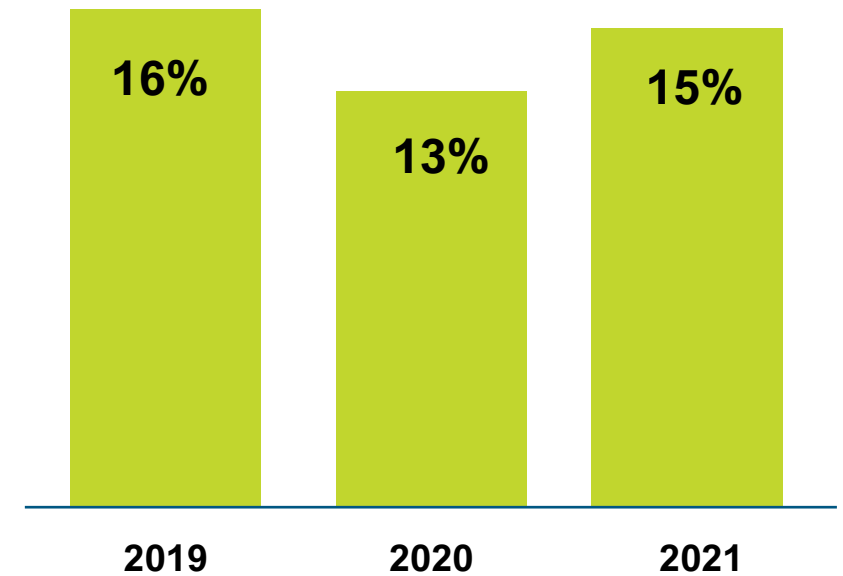
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Accuracy

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



Inaccurate Orders
Range by brand is 6% - 21%



Inaccurate orders add 71.06 seconds to Total Time (2021)

Accuracy

Accuracy
Higher with
OCBs*



Accurate
Orders Are
Faster



Accurate
Orders Down
2% in 2021



* LED or LCD graphic board that displays the individual items you have ordered

2021 Top 5 Accuracy by Brand

1



2



3

Tied for 3rd



Customer Service



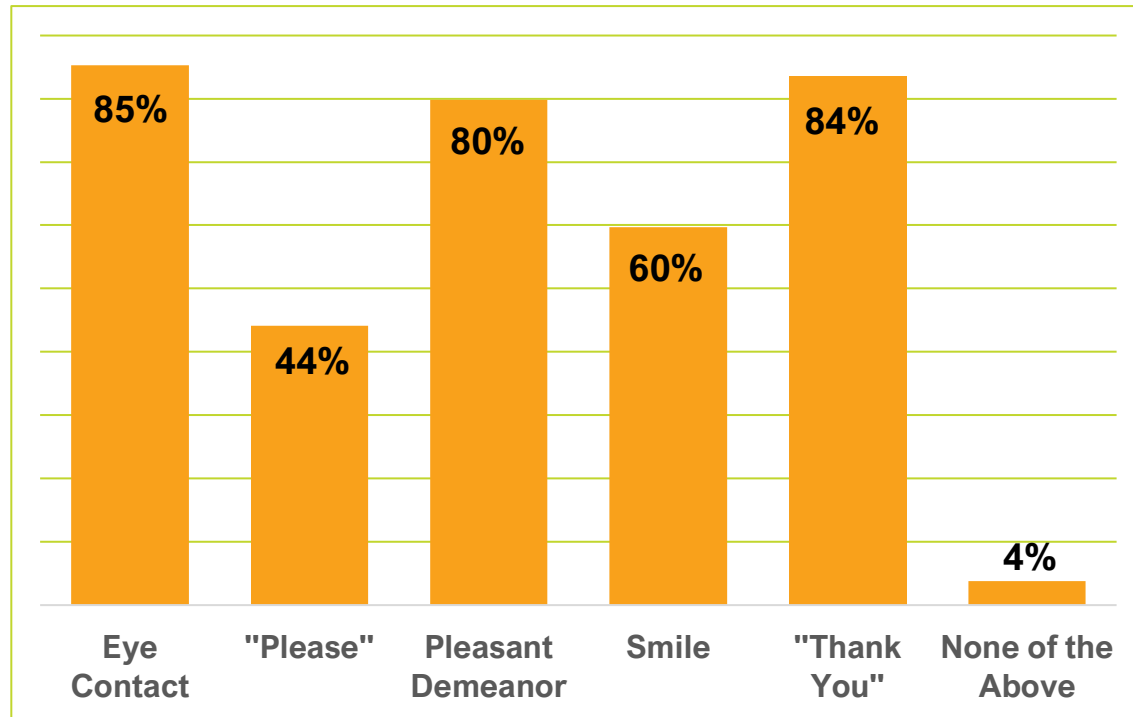
Full report includes:

- By Brand
- By Region
- By Menu – Burgers, Chicken, Specialty, Wide Variety
- By Friendliness
- By Satisfaction Level
- By Masks
- By Cleanliness

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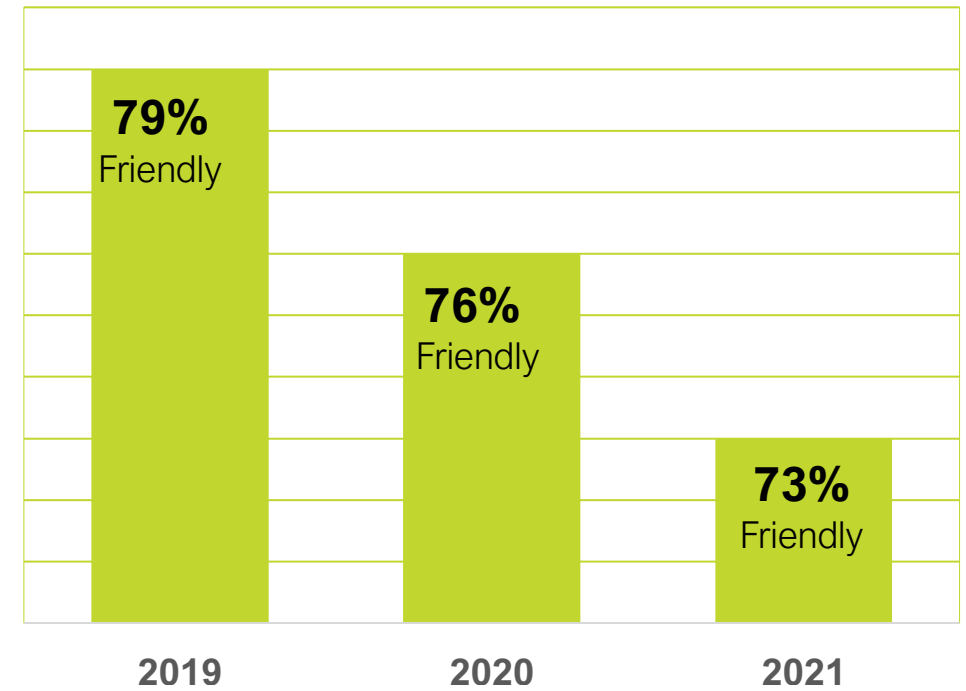
Friendliness

Good Service Attributes



Overall, how would you **rate the service** you received on this visit?

Friendliness Continues to Decline





Full report includes:

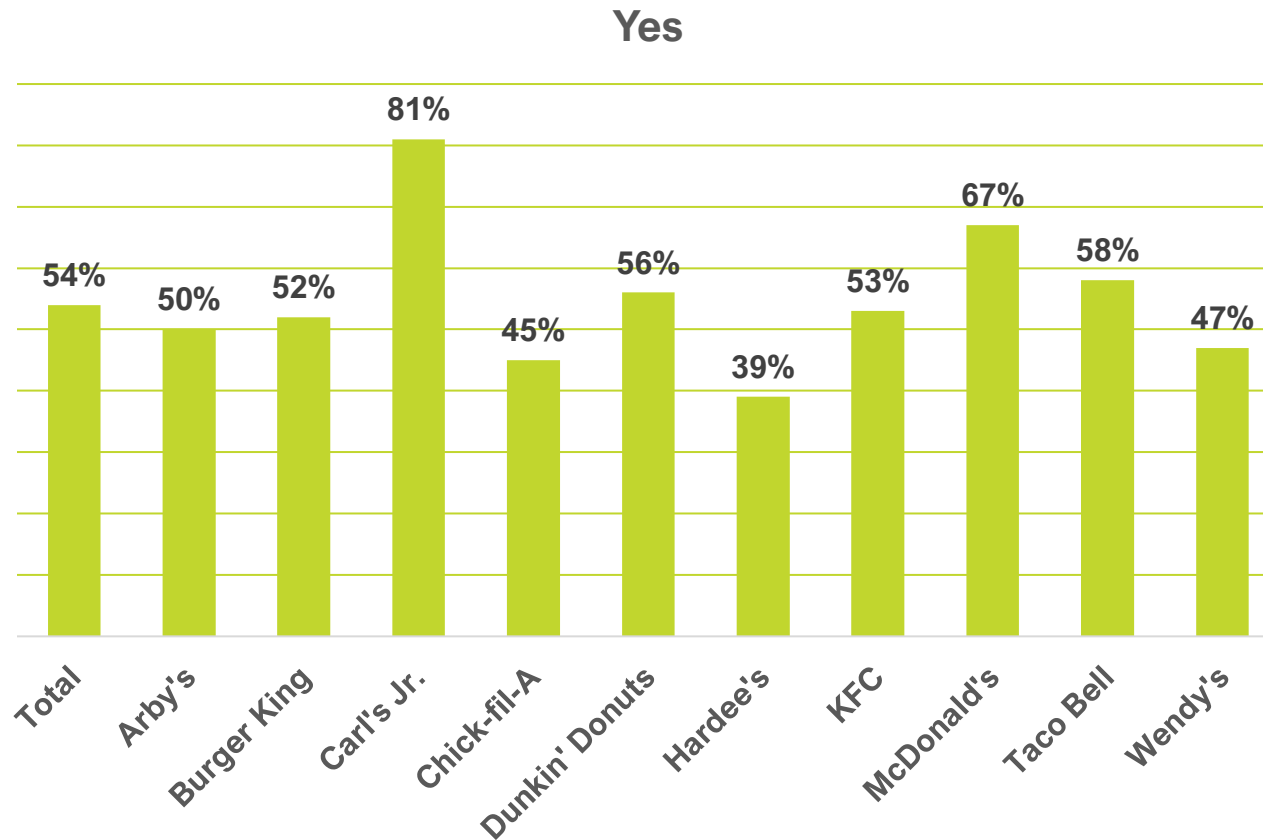
- By Brand
- By Region
- Dine In Available
- By Masks
- By Accuracy
- How Order was Delivered

Effects of Covid-19

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Covid Effects: Masks

Masks by Brand and Overall



How was your order given to you?

97.5%



The order was handed to me by the team member

2020

91%
of the country
wearing masks



2021

54%
of the country
wearing masks

Food Quality



Full report includes:

- By Brand
- By Menu – Burgers, Chicken, Specialty, Wide Variety
 - By Main Entrée
 - By Side Item
 - By Drink
- Taste
- Temperature
- Portion Size
- Time of Day
- By Wait Time / Service Time / Total Time
- Region
- By Satisfaction Level

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Taste

Was the taste of the **Main Entrée** as expected?



95%
Said YES
(2021)

Top 5 Main Entrée Rating 2021

1 Chick-fil-A

2 Arby's

3 Taco Bell

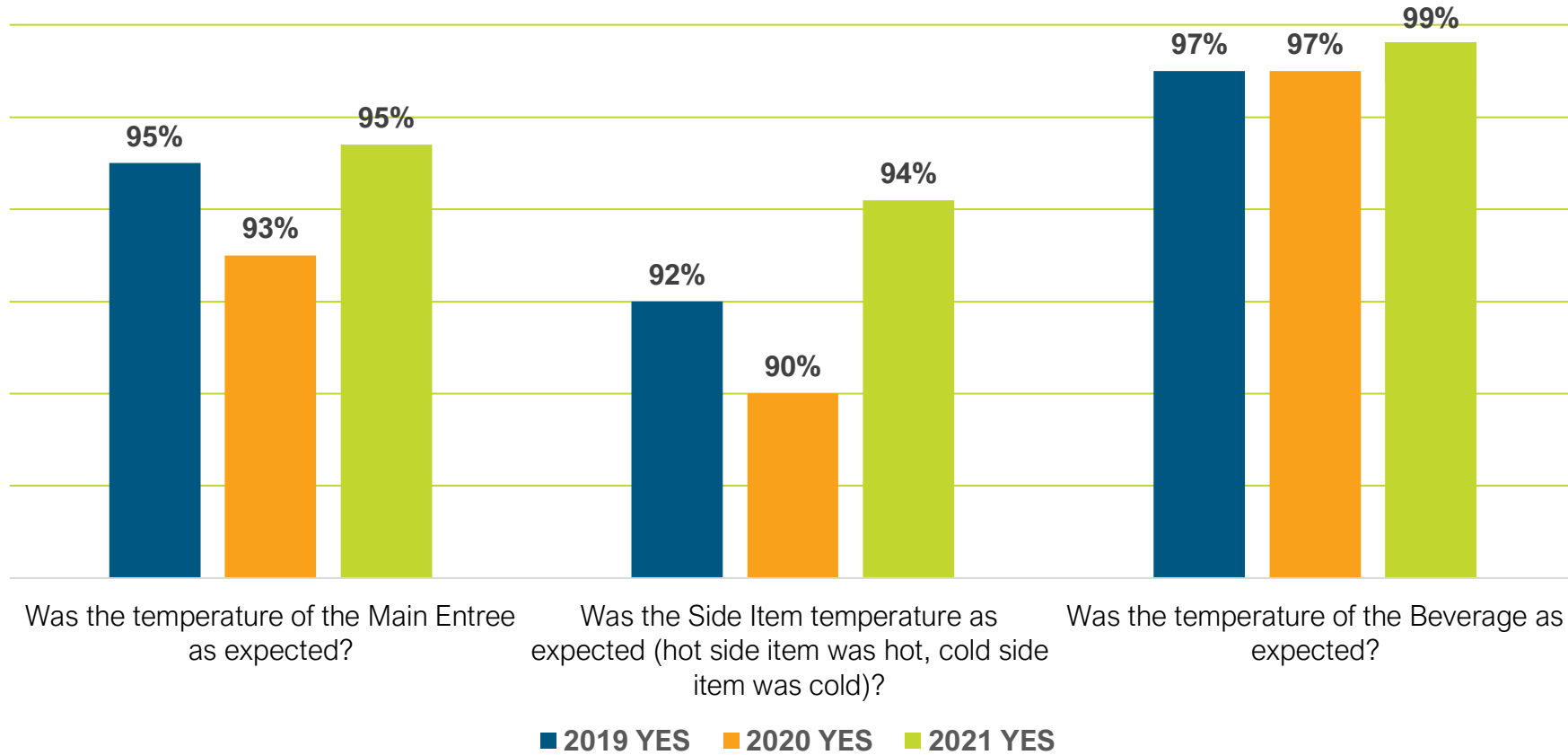
4 McDonald's

5 KFC

Temperature



Temperature As Expected



Suggestive Selling



Full report includes:

- Total Time with / without Suggestive Sells
- By Brand
- Items Most Suggested

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Suggestive Selling

Average 39% with suggestive selling with a range of 9%* - 68%



If a Brand upsells, what was suggested? Top 5

| | | |
|---|-------------------|-------|
| 1 | Combo Meal | 80.0% |
| 2 | Upsize Combo | 18.6% |
| 3 | Larger Drink Size | 7.5% |
| 4 | Dessert Item | 5.3% |
| 5 | Special Promo | 5.0% |

*Some brands do not upsell

Satisfaction



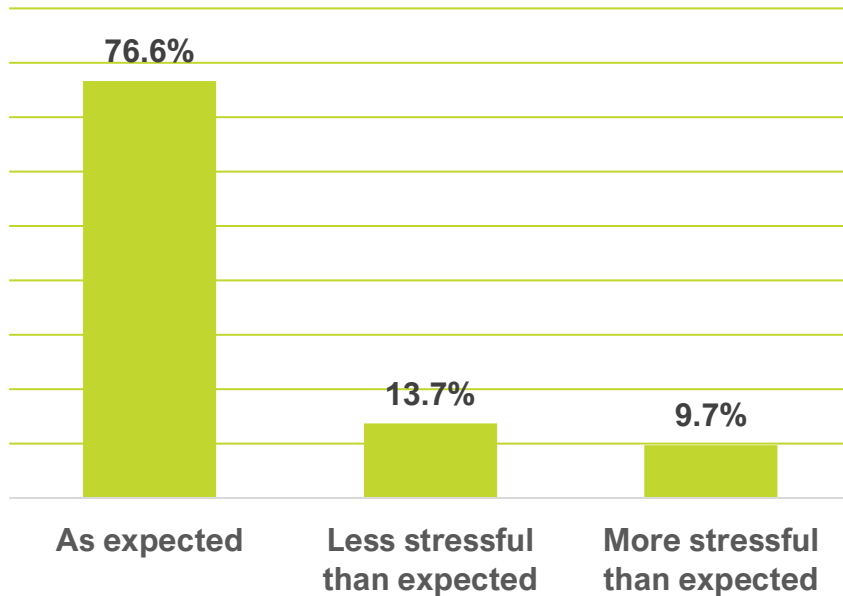
Full report includes:

- Overall Experience
- Speed of Service
- Food Quality: Taste, Temperature, Portion Size
- Accuracy
- Friendliness
- Cleanliness

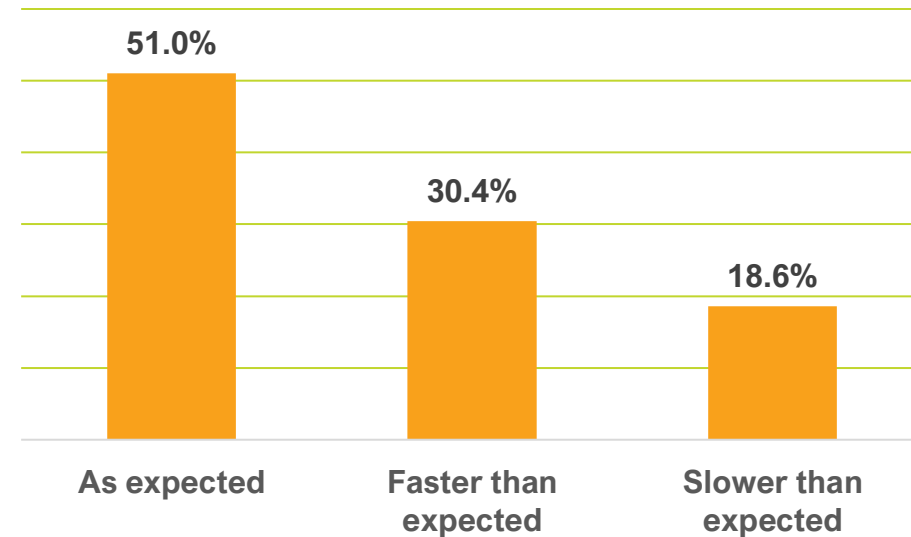
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Satisfaction: Ordering & Speed

*When thinking about the ordering process, please rate your **overall experience**.*



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





Full report includes:

2021 vs 2020 Ranking By:

- Fastest Wait Time
- Order Accuracy
- Customer Service
- Taste

Category Leaders

Contact

To discuss designing a customized mystery shopping program for your business, and/or to purchase the full, comprehensive report, please email us at:

2021DriveThruStudy@seelevelhx.com

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