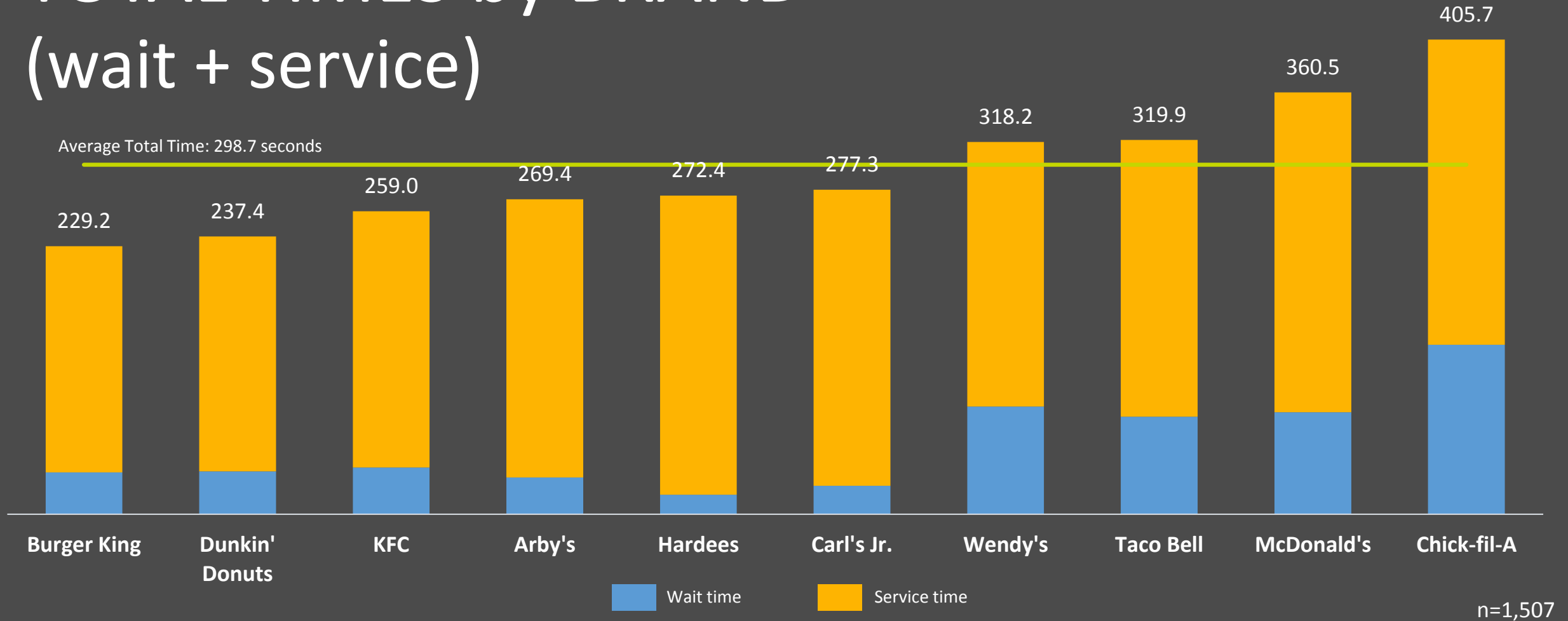


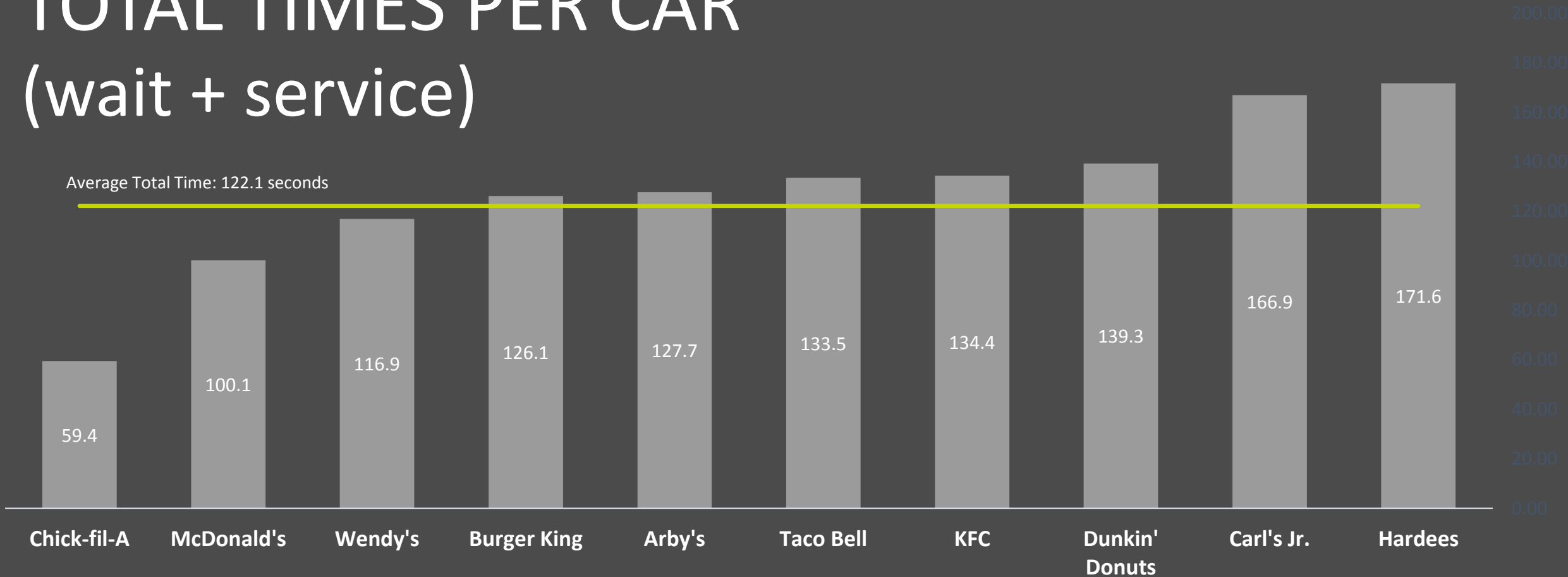


## 2018 QSR Drive-thru Study Results & Implications

# TOTAL TIMES by BRAND (wait + service)



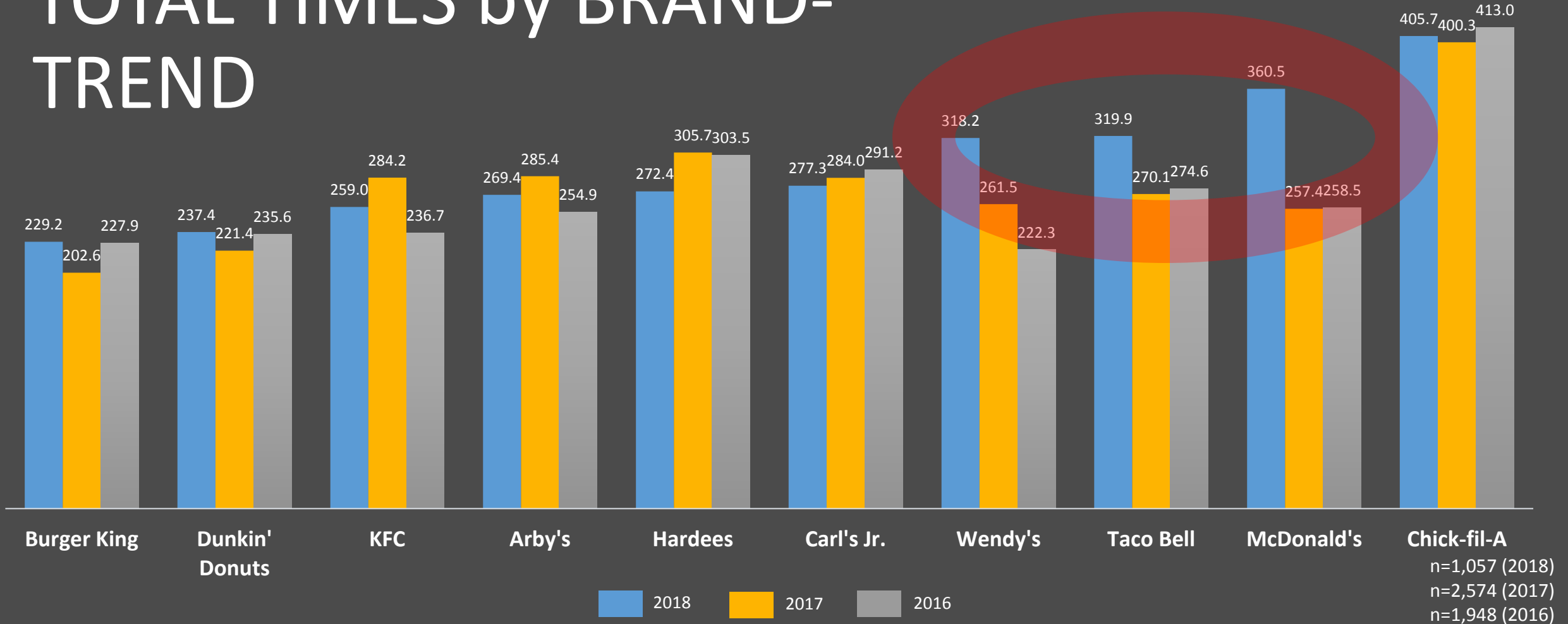
# TOTAL TIMES PER CAR\* (wait + service)



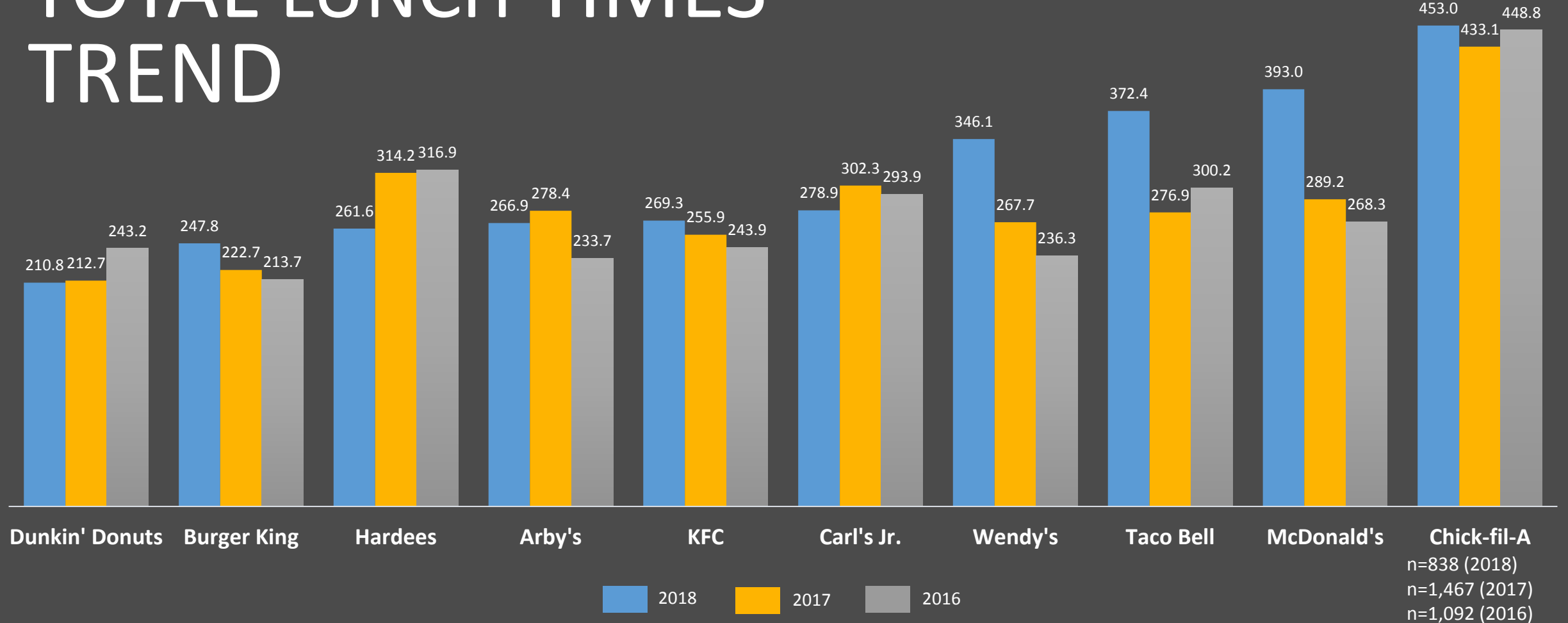
\* Total time divided by total number of cars in line +1

n=1,507

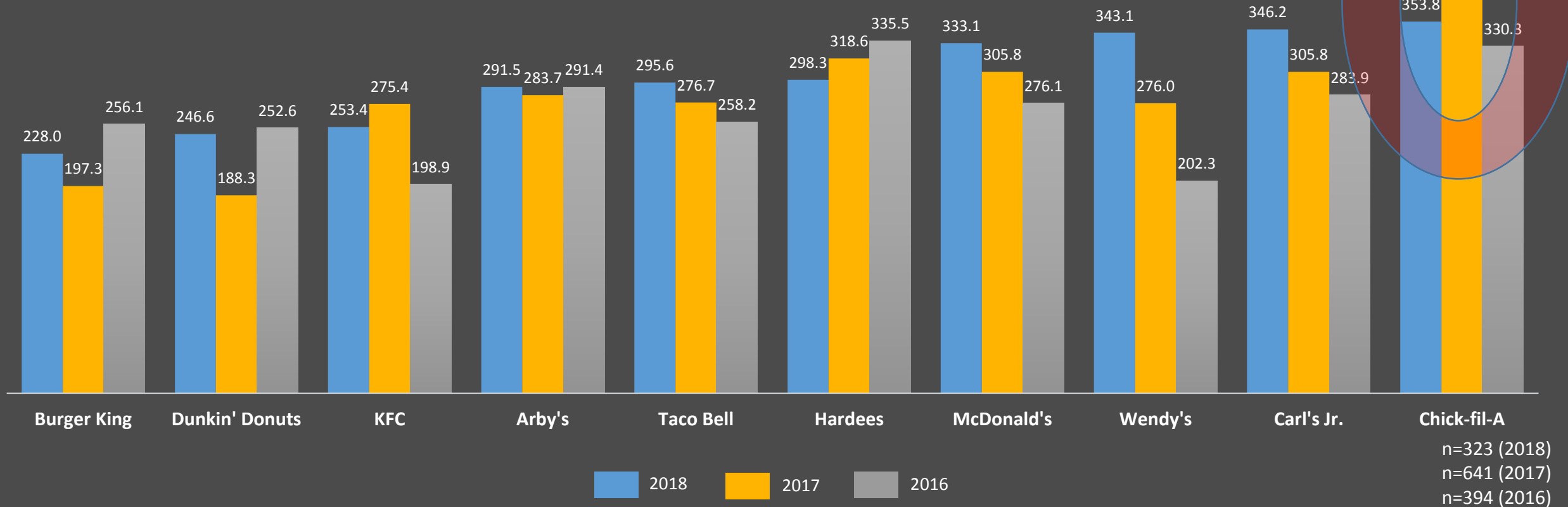
# TOTAL TIMES by BRAND-TREND



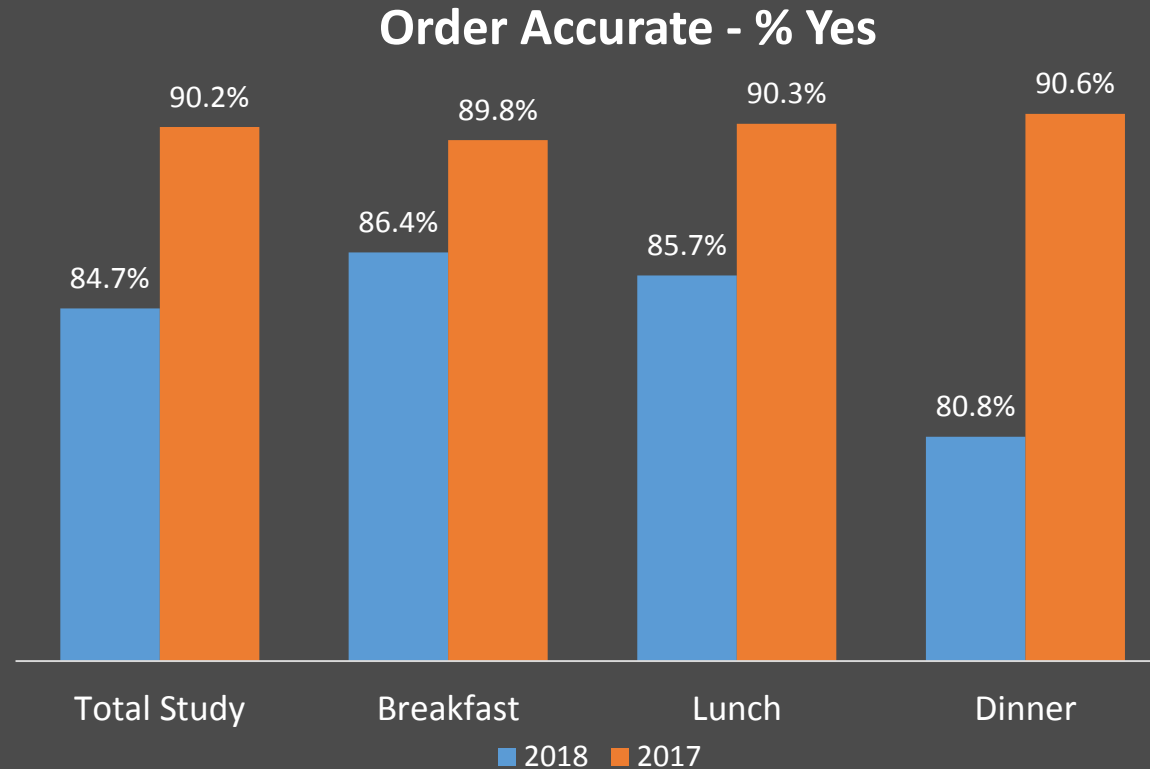
# TOTAL LUNCH TIMES- TREND



# TOTAL DINNER TIMES- TREND



# ORDER ACCURACY 2018 vs 2017



Order accuracy has decreased over the past year.

n=1,507 (2018)  
n=2,574 (2017)

# ORDER ACCURACY



Service Time - Accurate Orders  
**293.8 seconds**



Service Time - Inaccurate Orders  
**325.8 seconds**



Lost Time To Inaccurate Orders  
**32 seconds**

Daily  
Lost Transactions

21.9



Yearly  
Lost Transactions

7,993.5

Yearly  
Lost Revenue

**\$51,638**

@ \$6.46 average transaction

## \*Sample Calculation

Dinner – 4pm to 7pm: 10,800 secs

Dinner shops: 323

Dinner inaccuracy: 19.2%

Inaccurate orders: 62 (19.2% x 323)

Lost time due to inaccurate orders: 1,984 (62 x 32 secs)

Dinner Transactions lost: 6.7 (1,984/295.4 avg Dinner trans time)

n=1,507

\* For illustration purposes only. Makes a stop/start assumption.



# DIGITAL MENUBOARD



Total Time – with digital menu board  
**268.4 seconds**

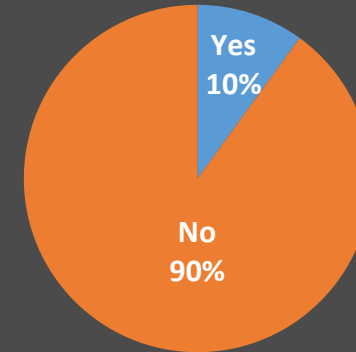


Total Time – with non-digital menu board  
**302.0 seconds**



Lost time with non-digital menu board  
**33.6 seconds**

## Digital Menu Board?



While not in widespread use (10%), digital menu boards appear to speed service time. Other benefits include their visual appeal and flexibility with regard to displaying menu items.

n=1,507

\* For illustration purposes only. Makes a stop/start assumption.

# SUGGESTIVE SELL



Service Time – Suggestive Sell Offered  
**279.1 seconds**

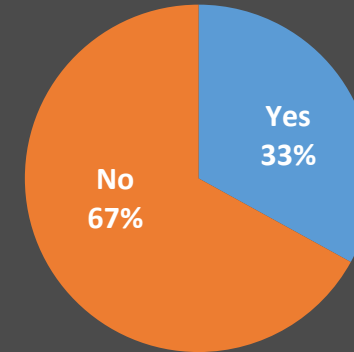


Service Time – Suggestive Sell Not Offered  
**308.3 seconds**



Lower service time with  
Suggestive Sell Offered  
**29.2 seconds**

## Suggestive Sell Offered?



With Suggestive Sell = **12.9 transactions/hour**

Without Suggestive Sell = **11.7 transactions/hour**

Additional **1.2** transactions every hour with suggestive sell\*

n=1,507

\* For illustration purposes only. Makes a stop/start assumption.

# THE WINNING COMBINATION

Accurate Order + Digital Menu Board + Suggestive Selling =  
drive-thru time **102.6 seconds faster.**

## FACTORS CONSIDERED

Order accuracy  
Use of pre-sell menu board  
Digital menu board  
Use of OCB  
Suggestive sell offered

**31  
COMBINATIONS  
TESTED**



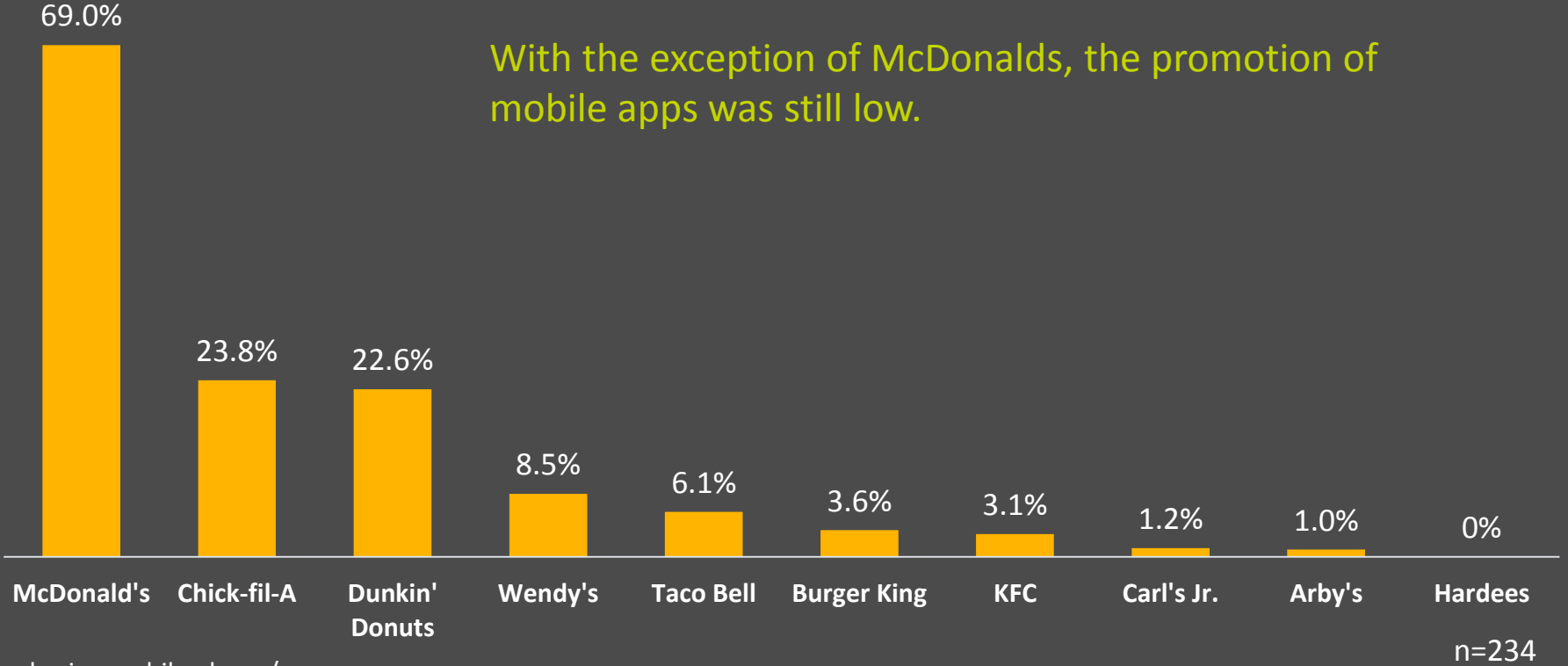
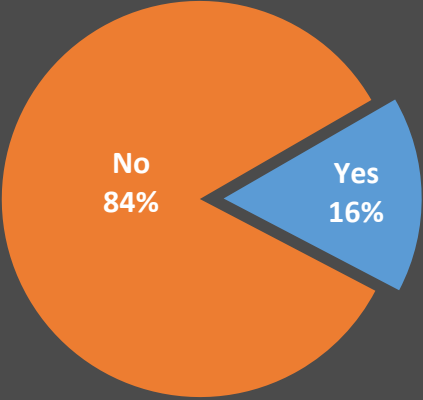
## WINNING COMBINATION

Order accuracy  
Digital menu board  
Suggestive sell offered

n=1,507

# INNOVATION IN ORDERING\*

Orders May be Placed Using  
Mobile Phone/App

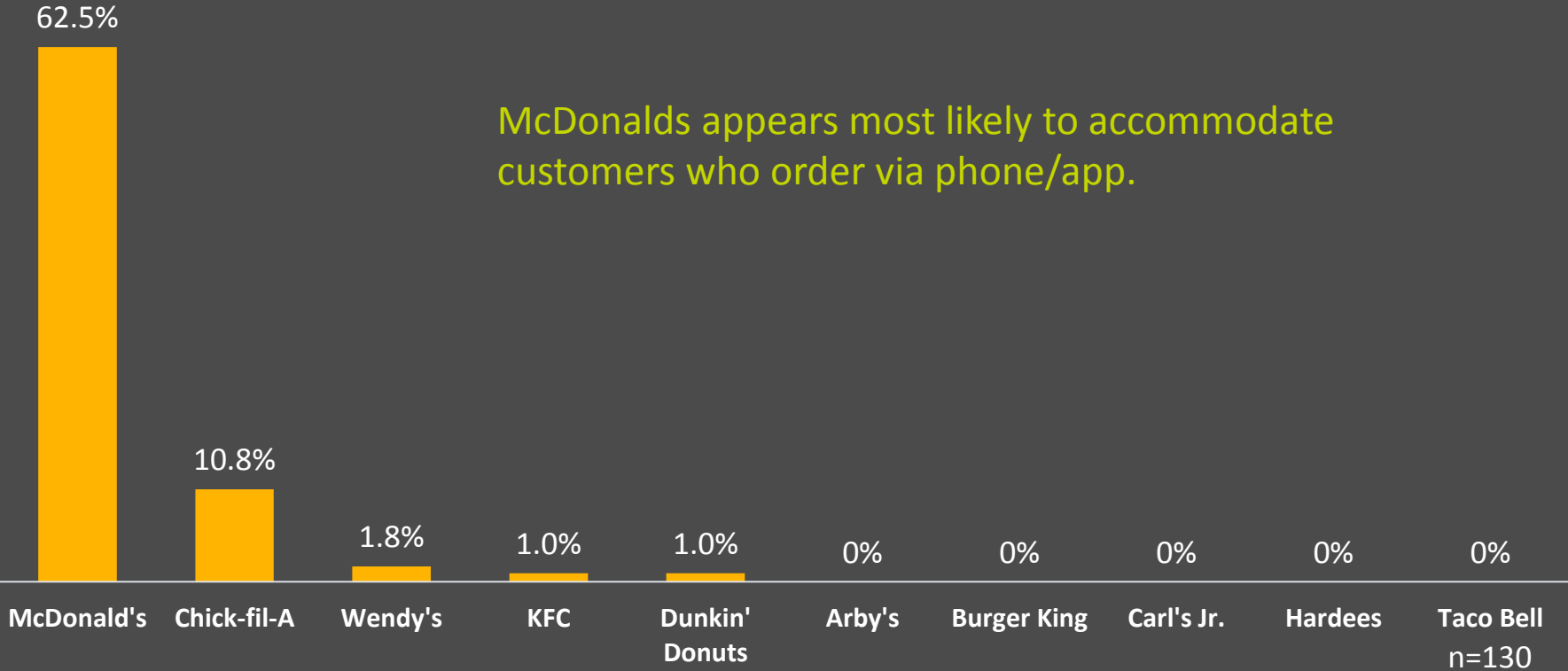
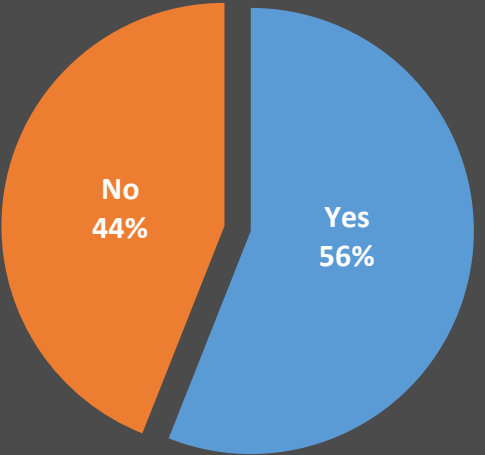


With the exception of McDonalds, the promotion of mobile apps was still low.

\*Yes- Observed evidence that orders may be placed using mobile phone/app

# PARKING SPACE FOR ORDER PICK-UP/ DELIVERY TO CAR

Parking Space Available



McDonalds appears most likely to accommodate customers who order via phone/app.

# LEADER OF THE STUDY



Arby's ranked in Top 5 of all four measurements.

RANKING	ACCURACY	SERVICE	TASTE	SPEED
1	Chick-fil-A	Chick-fil-A	Chick-fil-A	Burger King
2	Arby's	Arby's	Arby's	Dunkin' Donuts
3	Burger King	Burger King	Wendy's	KFC
4	McDonald's	Taco Bell	Carl's Jr.	Arby's
5	Hardees	Carl's Jr.	Taco Bell	Hardees

# LEADER OF THE STUDY – RUNNER UP



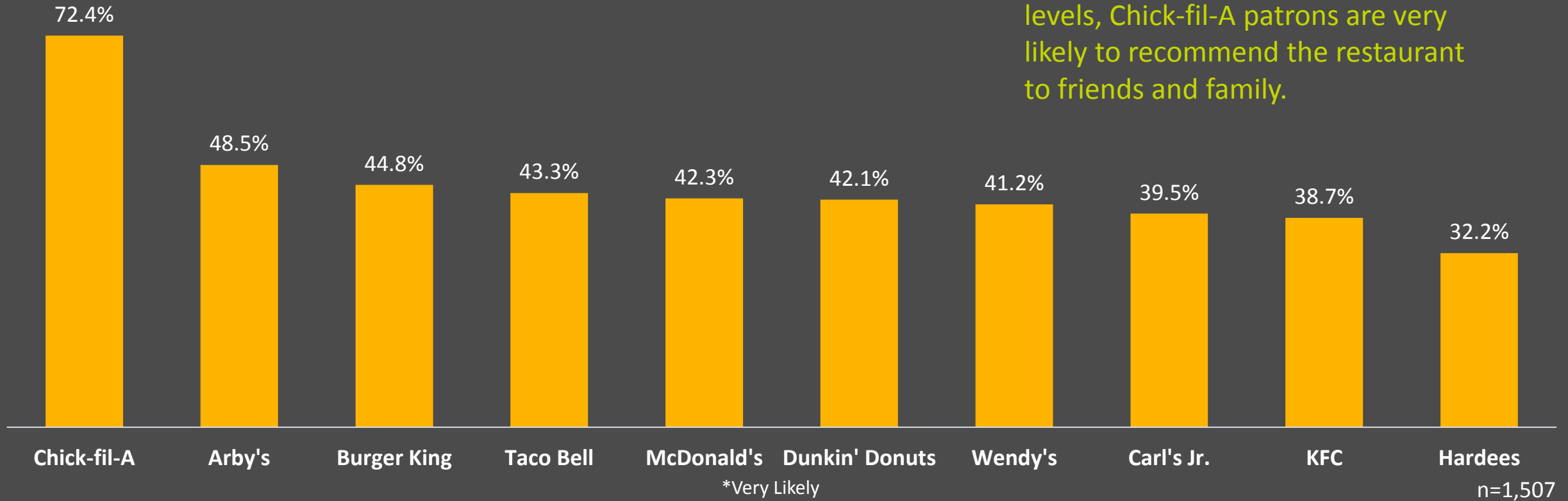
Chick-fil-A could attain leadership status with improved Total Service Times.

Chick-fil-A ranked last in speed of service.

RANKING	ACCURACY	SERVICE	TASTE	SPEED
1	Chick-fil-A	Chick-fil-A	Chick-fil-A	Burger King
2	Arby's	Arby's	Arby's	Dunkin' Donuts
3	Burger King	Burger King	Wendy's	KFC
4	McDonald's	Taco Bell	Carl's Jr.	Arby's
5	Hardees	Carl's Jr.	Taco Bell	Hardees

# RECOMMEND TO FRIENDS and FAMILY\*

Even with relatively slower service levels, Chick-fil-A patrons are very likely to recommend the restaurant to friends and family.





# WAYS TO DRIVE PRE-SELL MENUBOARDS PERFORMANCE



Customer eyes go here first

Then to the right

And then all the way to the left

**CENTER BIG BRAND ITEMS**  
**LESS THAN 10 ITEMS PER SCREEN**  
**HIGHLIGHT HIGH MARGIN ITEMS**  
**PICTURES LEFT / TEXT RIGHT**

# Industry Observations

- Off Premises and Implications for Drive Thru
- Technology
- Mobile
- Artificial Intelligence
- The Future of Drive Thru
- OH THE HUMANITY, or Does Customer Service Even Matter?





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