QUICK-SERVICE UNMASKED:

Revealing the latest trends & statistics regarding quick service restaurants performances amid COVID-19.
SEELEVEL HX ANNUAL DRIVE-THRU STUDY

The 2020 SeeLevel HX Annual Drive-Thru Study highlights drive-thru performances of ten quick-service restaurants. In addition, this annual benchmark study answers key questions regarding COVID-19 and its impact on the industry nationwide. Use these results to strategize how your brand will make important updates to stay compliant and maintain customer confidence in your restaurants.

This report only covers the key highlights of the study. To dig deeper into each question by chain, you can purchase the full study results for $4,995.

PURCHASING THE STUDY GIVES YOU ACCESS TO:

- Detailed Study Findings
- Raw Data File in Excel
- Customizable Reporting Portal
  - Readout of the Data
- Your Brand Questions Answered by SeeLevel HX Experts

PURCHASE THE FULL STUDY »
TOTAL TIMES RUNDOWN

KFC, McDonald’s and Taco Bell were faster in 2020 than in 2019.

Avg. Total Time: 356.8 seconds

<table>
<thead>
<tr>
<th>Brand</th>
<th>Total Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>KFC</td>
<td>283.3</td>
</tr>
<tr>
<td>Taco Bell</td>
<td>310.2</td>
</tr>
<tr>
<td>Hardee's</td>
<td>321.6</td>
</tr>
<tr>
<td>Carl's Jr.</td>
<td>341.6</td>
</tr>
<tr>
<td>Burger King</td>
<td>344.3</td>
</tr>
<tr>
<td>McDonald's</td>
<td>349.3</td>
</tr>
<tr>
<td>Dunkin'</td>
<td>351.7</td>
</tr>
<tr>
<td>Wendy's</td>
<td>358.7</td>
</tr>
<tr>
<td>Arby's</td>
<td>394.2</td>
</tr>
<tr>
<td>Chick-fil-A</td>
<td>488.8</td>
</tr>
</tbody>
</table>

Total times by brand = wait times plus service times
*There was an average of 3.2 vehicles in line when a car pulled into a drive-thru.
2020 SeeLevel HX Annual Drive-Thru Study
COVID-19 is here to stay. What can brands do to continuously improve speed and efficiency in this new normal?

**Increases times increase costs**

- **$32,091.33** potential loss per year per store unit
- **$320,913,340** per 10,000 locations
- **$64,182,668** per 2,000 locations
- **$160,456,670** per 5,000 locations

### 2020 vs. 2019 Avg. Total Time

- **2020 Avg. Total Time**: 356.8 seconds
- **2019 Avg. Total Time**: 327.0 seconds

**Notes:**

- n=1,490
- Average meal cost estimated at $6.83.
- Total times by brand = wait times plus service times
- Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.
- Brands should use their own timing and average purchase point to determine their own potential loss.
REVEALING TOTAL TIMES OVER THE YEARS

What can your brand learn from KFC and Taco Bell to improve total times?

Total times by brand = wait times plus service times

2020 SeeLevel HX Annual Drive-Thru Study
REVEALING TOTAL TIMES OVER THE YEARS

What can your brand learn from McDonald’s to improve total times?

Total times by brand = wait times plus service times

2020 SeeLevel HX Annual Drive-Thru Study
THE $94K ELUSIVE ACCURACY ISSUE

What is your restaurant brand doing to improve order accuracy and save on unnecessary costs?

Q20. Was your drive-thru order filled correctly and completely accurate?

Yes 87.0%
No 13.0%

Service Time - Accurate Orders
231.9 seconds

Service Time - Inaccurate Orders
281.0 seconds

$94,232.05 potential loss per year per store unit

$942,320,500 per 10,000 locations

$188,464,100 per 2,000 locations

$471,160,250 per 5,000 locations

n=1,490  n yes = 1,297
*Average meal cost estimated at $6.83. 2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day. Brands should use their own timing and average purchase point to determine their own potential loss.
Is $26M in savings worth the pre-sell menuboard investment for your brand?

Q34. Was a “pre-sell” menuboard in place?

- No: 45.7%
- Yes: 54.3%

Total Time – with Pre-Sell: 350.8 seconds
Total Time – without Pre-Sell: 364.0 seconds

$12,986.70 potential savings per year per store unit

$129,867,000 per 10,000 locations
$25,973,400 per 2,000 locations
$64,933,500 per 5,000 locations

**Average meal cost estimated at $6.83. 2020 SeeLevel HX Annual Drive-Thru Study**

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day. Brands should use their own timing and average purchase point to determine their own potential loss.**
Chick-fil-A and Dunkin’ seem to have a different strategy than using pre-sell menuboards.
DIGITAL MENUBOARDS ARE PAYING OFF

This is the first year digital menuboards reduced total times.

Who’s taking the lead and generating more ROI with digital innovation? Purchase the full study for $4,995 to find out.

Q35a. Was the primary menuboard a digital menuboard?

Service Time – with Menuboard 228.8 seconds

Service Time – without Menuboard 241.1 seconds

n=1,490; n yes=345

*Average meal cost estimated at $6.83. 2020 SeeLevel HX Annual Drive-Thru Study

$27,922.50 potential savings per year per store unit

$279,225,000 per 10,000 locations

$55,845,000 per 2,000 locations

$139,612,500 per 5,000 locations

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day. Brands should use their own timing and average purchase point to determine their own potential loss.
ACCURACY WITHOUT DIGITAL MENUBOARDS

While digital menuboard help with timing, their ability to drive accuracy improvements is more ambiguous.

2019:
3.9% drop in order accuracy without a digital menuboard

2020:
1.4% drop in order accuracy without a digital menuboard

n menuboard=345 when comparing digital menuboard accuracy to non-digital menuboard accuracy in each individual year

Q35a. Was the primary menuboard a digital menuboard?
Q20. Was your drive-thru order filled correctly and completely accurate?

2020 SeeLevel HX Annual Drive-Thru Study
Order Confirmation Boards (OCBs) savings more than doubled in 2020. Is your brand making this investment to save $39K per store unit per year?

Q33. Was an Order Confirmation Board (OCB) in place?

- No 59.2%
- Yes 40.8%

Service Time – with OCB
228.0 seconds

Service Time – without OCB
245.4 seconds

**Average meal cost estimated at $6.83.
2020 SeeLevel HX Annual Drive-Thru Study

$39,139.95 potential savings per year per store unit

$391,399,500 per 10,000 locations

$78,277,900 per 2,000 locations

$195,694,750 per 5,000 locations

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day. Brands should use their own timing and average purchase point to determine their own potential loss.
CLOSING THE GAP: OCBS & ORDER ACCURACY

What are brands doing to close the gap between OCB presence and order accuracy?

2019:
3.5% drop in order accuracy without an OCB

2020:
1.1% drop in order accuracy without an OCB

n OCB=608 when comparing OCB accuracy to non-OCB accuracy in each individual year
Q33. Was an Order Confirmation Board (OCB) in place?
Q20. Was your drive-thru order filled correctly and completely accurate?

2020 SeeLevel HX Annual Drive-Thru Study
WHO’S FOCUSED ON SUGGESTIVE SELLING?

With only 28% of locations offering a suggestive sell, what else are these brands doing to reduce total times?

Q40. Was a suggestive sell offered?

- No: 72.0%
- Yes: 28.0%

Service Time – with Suggestive Sell
233.1 seconds

Service Time – without Suggestive Sell
240.3 seconds

$16,206.00
potential savings per year per store unit

$162,060,000
per 10,000 locations

$32,412,000
per 2,000 locations

$81,030,000
per 5,000 locations

*Average meal cost estimated at $6.83.
2020 SeeLevel HX Annual Drive-Thru Study

**Calculated with the average meal cost assuming drive-thrus stay busy for the entire day. Brands should use their own timing and average purchase point to determine their own potential loss.
One chain’s dip in speaker clarity performance found in the full data set brings to light the need to periodically check your technology to ensure quality.

Q39b. If you placed your order at the speaker, was the interaction via the speaker clear & understandable?

Yes 94.4%
No 5.6%
NO SURPRISES IN IMPROVEMENT AREAS

Which area of improvement should your brand zone in on to win the customer dollar?

- Location Layout: 28.0%
- Speed of Service: 26.2%
- Customer Service: 16.0%
- Food Quality: 14.6%
- Order Accuracy: 9.7%
- Cleanliness: 5.5%

n=1,490

Q64. What is the one area that you feel this restaurant can improve?

*This is not customer data, but instead data from paid mystery shoppers.
2020 SeeLevel HX Annual Drive-Thru Study
UNVEILING SHIFTS IN CATEGORY LEADERS

McDonald’s made great strides in accuracy, and Taco Bell’s brand emphasis looks like it was on speed. Burger King seemed focused on customer service, while Dunkin’ seemed to take a more comprehensive approach. To see the full breakdown and performance of each chain in each category, purchase the full study here.

<table>
<thead>
<tr>
<th>Ranking</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
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</thead>
<tbody>
<tr>
<td>Accuracy</td>
<td>Chick-fil-A</td>
<td>McDonald’s</td>
<td>Arby’s</td>
<td>Burger King</td>
<td>Dunkin’</td>
<td>Hardee’s</td>
<td>Carl’s Jr.</td>
<td>Taco Bell</td>
<td>Wendy’s</td>
<td>KFC</td>
</tr>
<tr>
<td>Customer Service</td>
<td>Chick-fil-A</td>
<td>Arby’s</td>
<td>Burger King</td>
<td>Dunkin’</td>
<td>Hardee’s</td>
<td>McDonald’s</td>
<td>Wendy’s</td>
<td>Carl’s Jr.</td>
<td>Taco Bell</td>
<td>KFC</td>
</tr>
<tr>
<td>Taste</td>
<td>Chick-fil-A</td>
<td>Arby’s</td>
<td>McDonald’s</td>
<td>Burger King</td>
<td>Dunkin’</td>
<td>Hardee’s</td>
<td>Carl’s Jr.</td>
<td>Taco Bell</td>
<td>Wendy’s</td>
<td>KFC</td>
</tr>
<tr>
<td>Speed</td>
<td>KFC</td>
<td>Taco Bell</td>
<td>Hardee’s</td>
<td>Carl’s Jr.</td>
<td>Burger King</td>
<td>McDonald’s</td>
<td>Dunkin’</td>
<td>Wendy’s</td>
<td>Arby’s</td>
<td>Chick-fil-A</td>
</tr>
</tbody>
</table>

*Customer Service and Taste are not customer data, but instead data from paid mystery shoppers.

2020 SeeLevel HX Annual Drive-Thru Study
COVID-19 CONSIDERATIONS
SPOTTING SIGNS FOR SAFETY GOALS

When is the right time to showcase your COVID-19 safety precautions to help customers decide if they want to dine in your establishments?

COVID-10. Did the restaurant have a sign explaining/stating their goals for the safety of customers and employees at the order station?

- Yes 12.3%
- No 87.7%

n=1,490
2020 SeeLevel HX Annual Drive-Thru Study
Locations in the Pacific (AK, CA, HI, OR, WA) were most likely to showcase signage regarding safety precautions, while locations in the West North Central division (IA, KS, MN, MO, NE, SD) were the least likely.
CONSIDERING THE USE OF GLOVES AND MASKS

Masks are more prevalent than glove wearing amid COVID-19, and if employees wore gloves, it was rare that a customer saw employees change them out. This data begs the age-old question, if customers aren’t witnessing your safety precautions and procedures, are they really happening?

COVID-5. Was the employee at the payment/Pickup window wearing a mask?

- Yes: 91.3%
- No: 8.7%

n=1,490

COVID-3b. If the cashier wore gloves to handle the payment, did you see them change gloves?

- Yes: 8.0%
- No: 92.0%

n=855

COVID-6. Was the employee at the payment/Pickup window wearing gloves?

- Yes: 78.1%
- No: 21.9%

n=1,490
Surprisingly, 15% of locations in the West North Central division (IA, KS, MN, MO, NE, SD) did not have masks, whereas states in the Mountain division (AZ, CO, ID, MT, NM, UT, WY) were most likely to have them.
OVERCOMING UNFORESEEN OBSTACLES

Nine percent of locations promoted a limited menu, whereas some limited the menu without notification. What efficiencies does your brand have in place to handle COVID-19-related events and/or supply chain issues?

COVID-4. Was the menu limited?

Yes  9.1%

No  90.9%

n=1,490
2020 SeeLevel HX Annual Drive-Thru Study
CALLING FOR ADDITIONAL PLASTIC BARRIERS

Only 58.7% of brands measured in the study provided clear plastic barriers at all drive-thru windows. Could this safety measure help customers feel safer and more comfortable dining with your brand?

COVID-7. Did the drive-thru provide clear plastic barriers at all drive-thru windows that shielded employee's faces?

n=1,490
2020 SeeLevel HX Annual Drive-Thru Study
CALLING FOR ADDITIONAL PLASTIC BARRIERS (CONT.)

While the Mountain division (AZ, CO, ID, MT, NM, UT, WY) was most likely to have employees wearing gloves/masks, they were the least likely to use plastic barriers.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific</td>
<td>59%</td>
<td>188</td>
</tr>
<tr>
<td>Mountain</td>
<td>47%</td>
<td>100</td>
</tr>
<tr>
<td>West North Central</td>
<td>55%</td>
<td>97</td>
</tr>
<tr>
<td>East North Central</td>
<td>59%</td>
<td>246</td>
</tr>
<tr>
<td>Mid Atlantic</td>
<td>65%</td>
<td>133</td>
</tr>
<tr>
<td>South Atlantic</td>
<td>57%</td>
<td>383</td>
</tr>
<tr>
<td>South Central</td>
<td>58%</td>
<td>158</td>
</tr>
<tr>
<td>East South Central</td>
<td>61%</td>
<td>104</td>
</tr>
<tr>
<td>West South Central</td>
<td>58%</td>
<td>158</td>
</tr>
<tr>
<td>New England</td>
<td>69%</td>
<td>81</td>
</tr>
</tbody>
</table>

n=1,490

COVID-7. Did the drive-thru provide clear plastic barriers at all drive-thru windows that shielded employee’s faces?
CONTACTLESS PROVES EASIER SAID THAN DONE

With 80.1% of orders handed to the customer directly by an employee, contactless order deliveries prove difficult to achieve in drive thrus.

COVID-8. How was your order given to you? (What type of contactless delivery was used?)

- 80.1% Employee Handed Order to Customer
- 16.4% Order Placed on Tray
- 1.3% Order Placed on Window
- 2.2% Other

n=1,490
2020 SeeLevel HX Annual Drive-Thru Study
EVALUATIONS BY BRAND

Arby’s  165
Burger King  165
Chick-fil-A  165
Dunkin’  165
KFC  165
McDonald’s  165
Taco Bell  165
Wendy’s  165
Carl’s Jr.  85
Hardee’s  85

= 20 shops

2020 SeeLevel HX Annual Drive-Thru Study
GEOGRAPHICAL DISTRIBUTION

1,490 Total Visits

- Pacific: 188
- Mountain: 100
- West North Central: 97
- Mid Atlantic: 133
- West South Central: 158
- East North Central: 246
- East South Central: 104
- South Atlantic: 383
- New England: 81
STUDY OVERVIEW

Fieldwork Period
June 2020 – August 2020

Shop Distribution

Attributes Measured

- Speed of Service
- Order Accuracy
- Suggestive Sell
- Customer Service
- Menuboard Appearance
- Order Confirmation Boards (OCBs)
- COVID-19

Breakfast
- 4.6%
- 12.2%

Lunch
- 54.8%

Dinner
- 7.0%
- 21.4%

Mid-Morning

Late Afternoon
READY TO UNMASK EVEN MORE DATA IN

DRIVE-THRU PERFORMANCE?

Purchase the full 2020 SeeLevel HX Annual Drive-Thru Study data for $4,995 and gain access to:

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