

# 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 »](#)

# BRANDS MEASURED

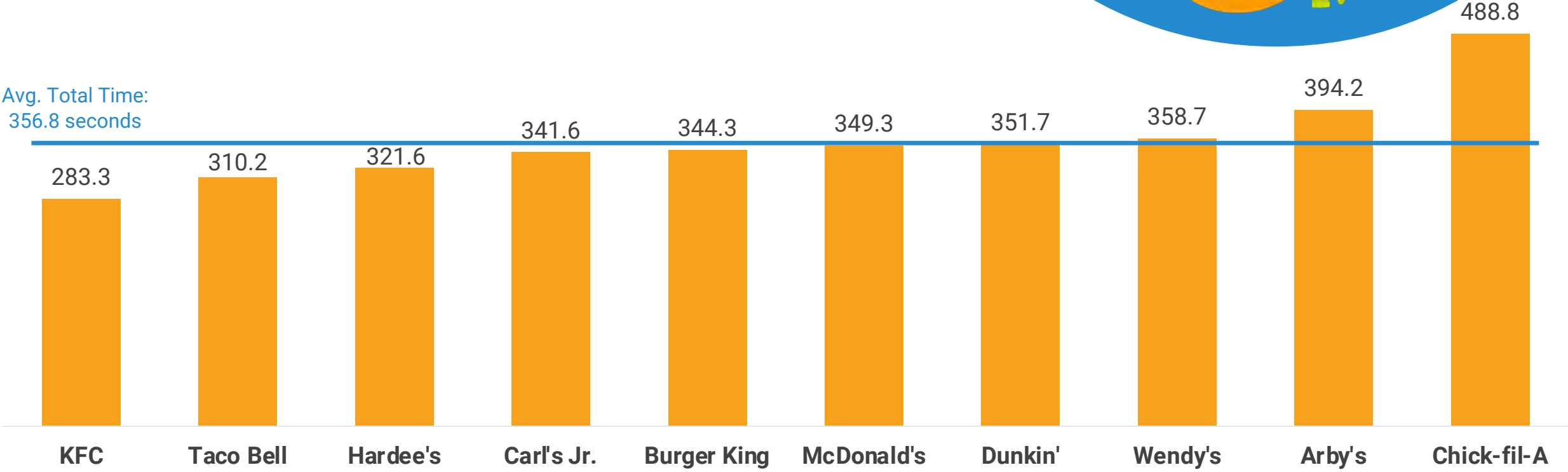


# TOTAL TIMES RUNDOWN

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



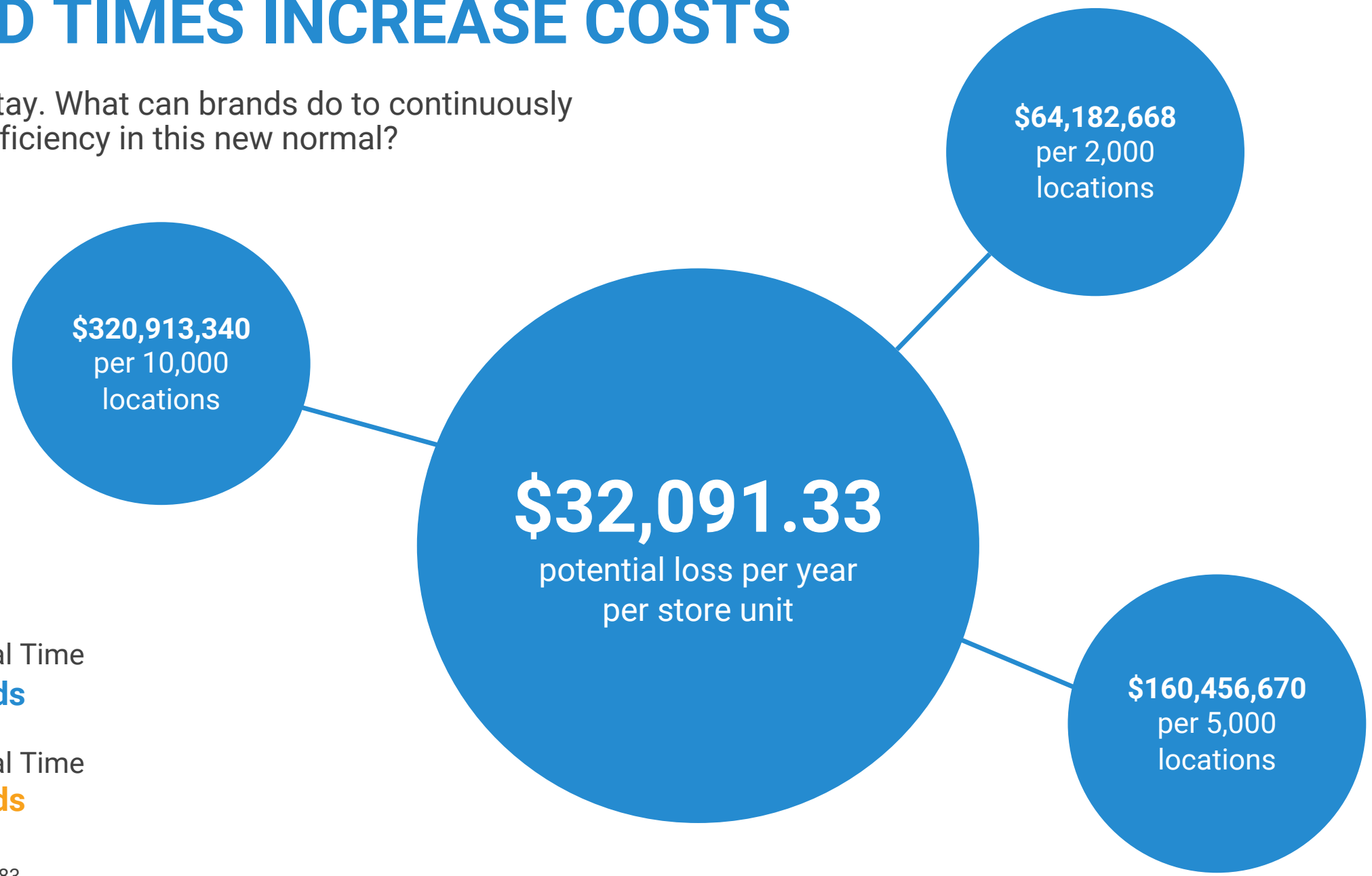
Avg. Total Time:  
356.8 seconds



n=1,490  
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.  
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# INCREASED TIMES INCREASE COSTS

COVID-19 is here to stay. What can brands do to continuously improve speed and efficiency in this new normal?



2020 Avg. Total Time  
**356.8 seconds**



2019 Avg. Total Time  
**327.0 seconds**

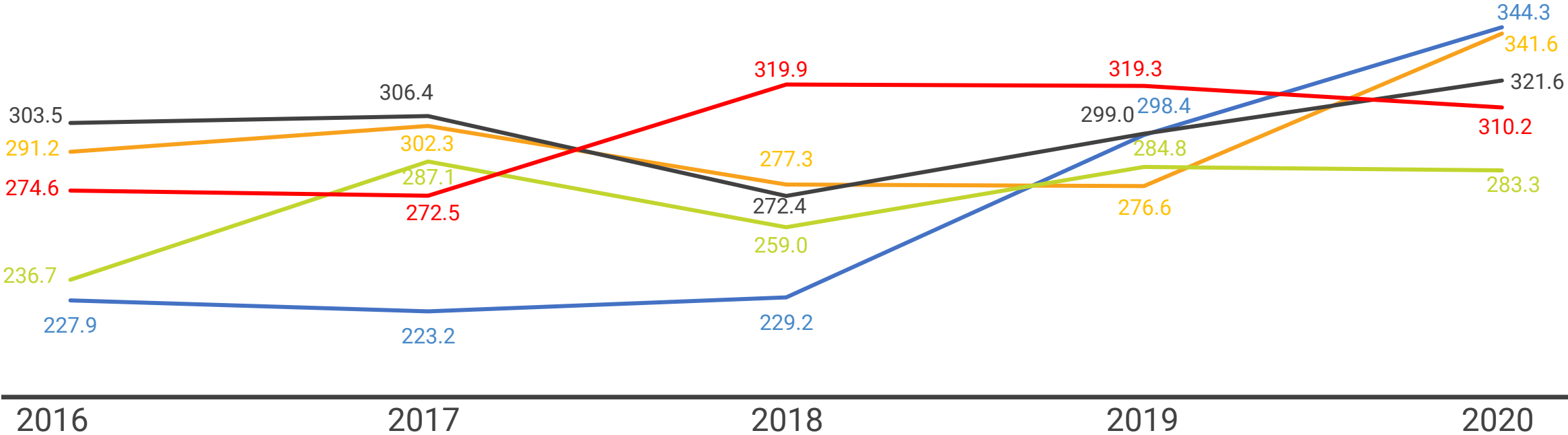
n=1,490

\*Average meal cost estimated at \$6.83.  
Total times by brand = wait times plus service times  
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.

# REVEALING TOTAL TIMES OVER THE YEARS

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

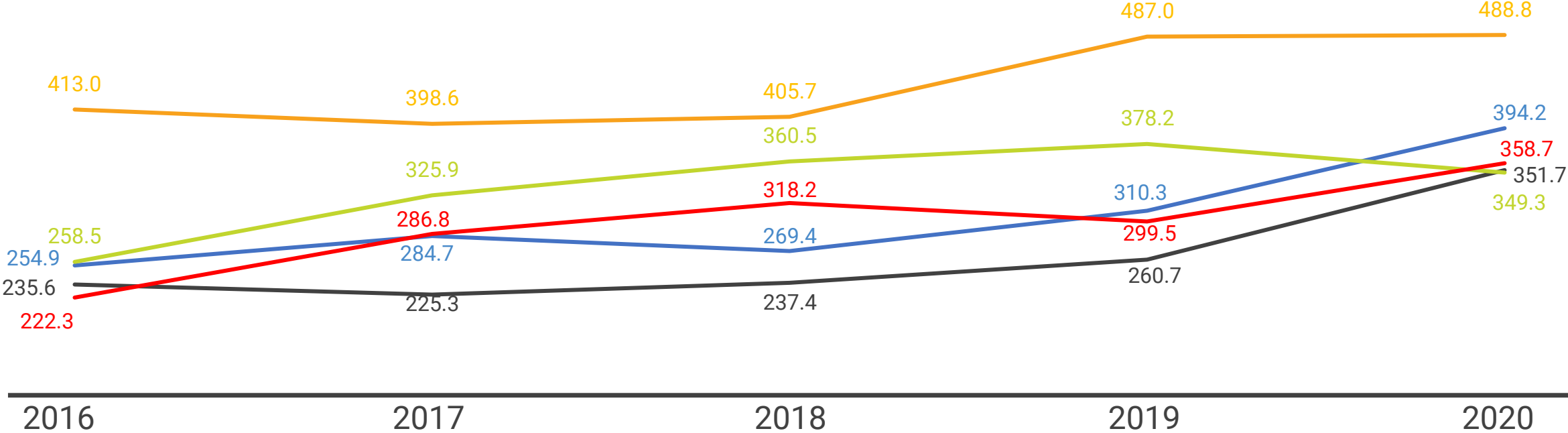


— Burger King — Carl's Jr — Hardee's — KFC — Taco Bell

Total times by brand = wait times plus service times  
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# REVEALING TOTAL TIMES OVER THE YEARS

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



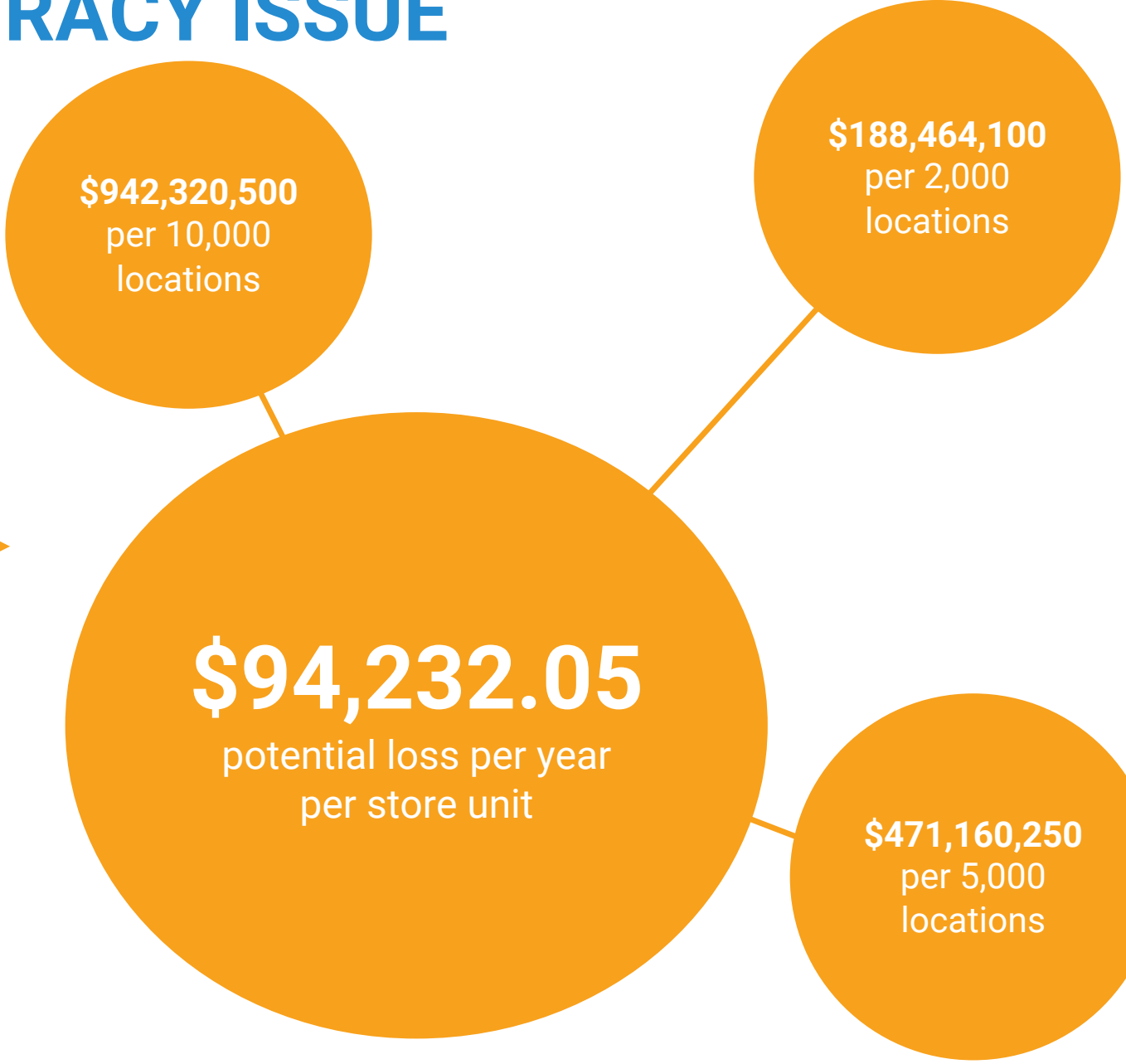
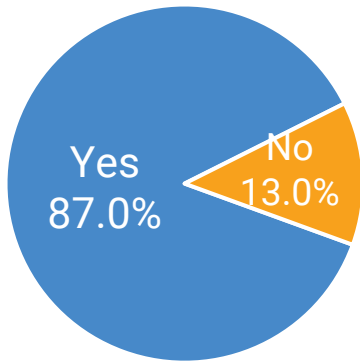
— Arby's — Chick-fil-A — Dunkin' — McDonald's — Wendy's


Total times by brand = wait times plus service times  
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# 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?



 Service Time - Accurate Orders  
**231.9 seconds**

 Service Time - Inaccurate Orders  
**281.0 seconds**

n=1,490 n yes = 1,297

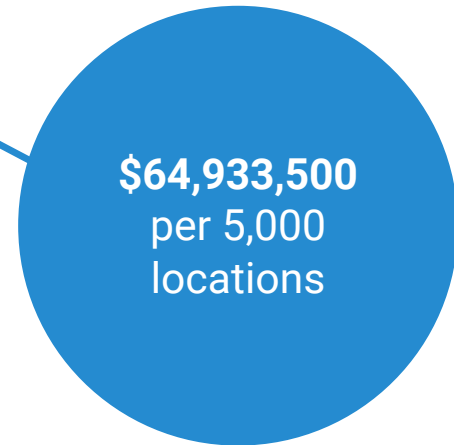
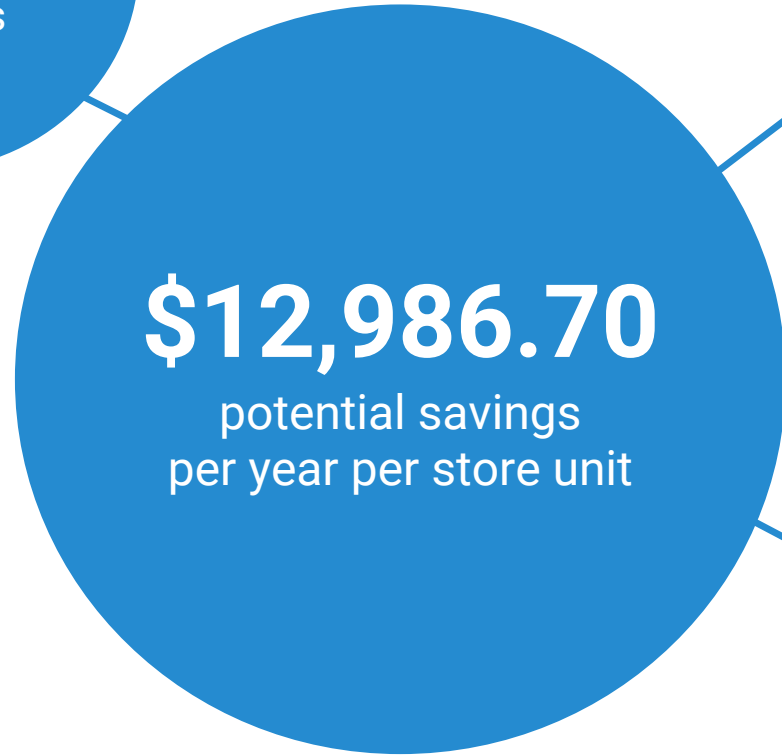
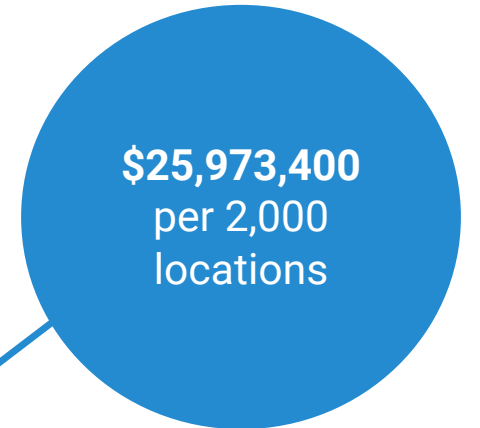
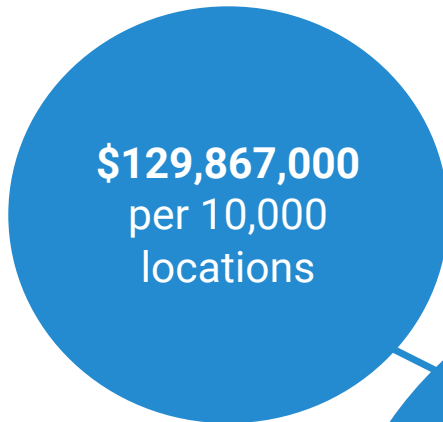
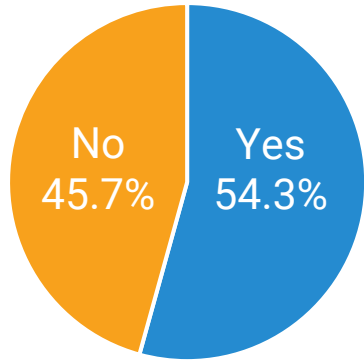
\*Average meal cost estimated at \$6.83.  
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\*\*Calculated with the average meal cost assuming drive-thrus stay busy for the entire day.  
Brands should use their own timing and average purchase point to determine their own potential loss.

# REVEALING PRE-SELL MENUBOARD SAVINGS

Is \$26M in savings worth the pre-sell menuboard investment for your brand?

Q34. Was a "pre-sell" menuboard in place?



Total Time – with Pre-Sell  
**350.8 seconds**



Total Time – without Pre-sell  
**364.0 seconds**

n=1,490 n yes= 809

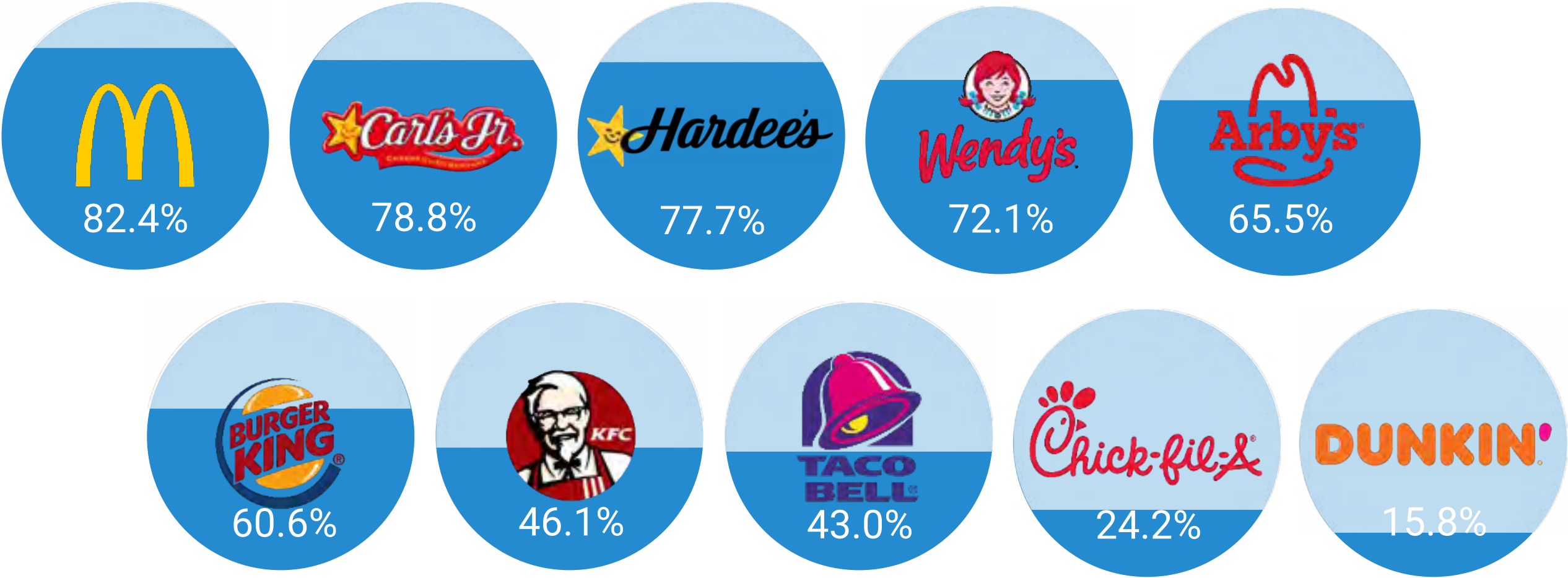
\*Average meal cost estimated at \$6.83.  
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# PRE-SELL MENUBOARD PRESENCE BY CHAIN

Chick-fil-A and Dunkin' seem to have a different strategy than using pre-sell menuboard.



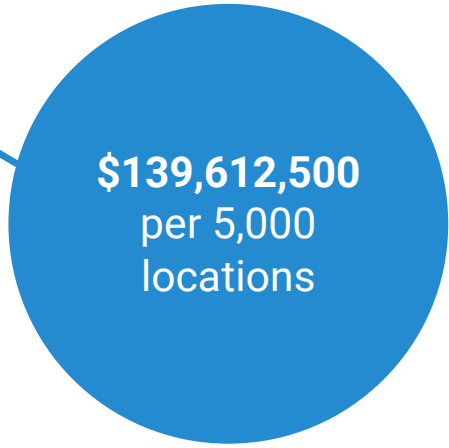
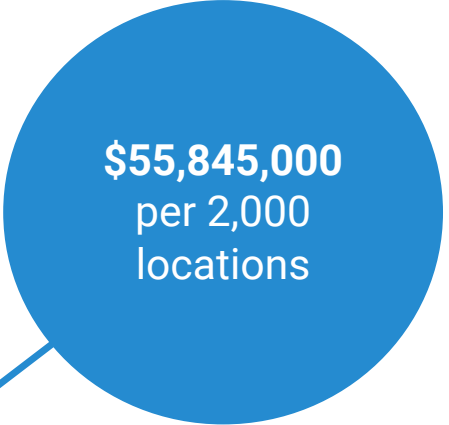
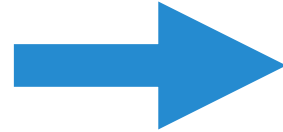
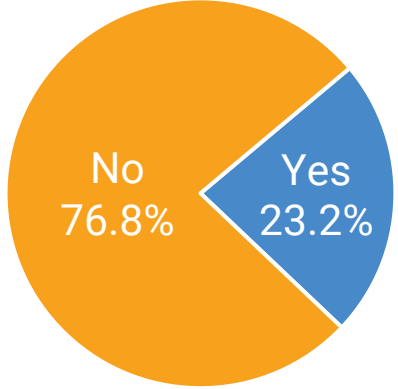
n=85 for Carl's Jr. and Hardee's  
n=165 for Arby's, Burger King, Chick-fil-A, Dunkin', KFC, McDonald's, Taco Bell and Wendy's  
Q34. Was a "pre-sell" menuboard in place?  
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# DIGITAL MENUBOARDS ARE PAYING OFF

This is the first year digital menuboard 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**

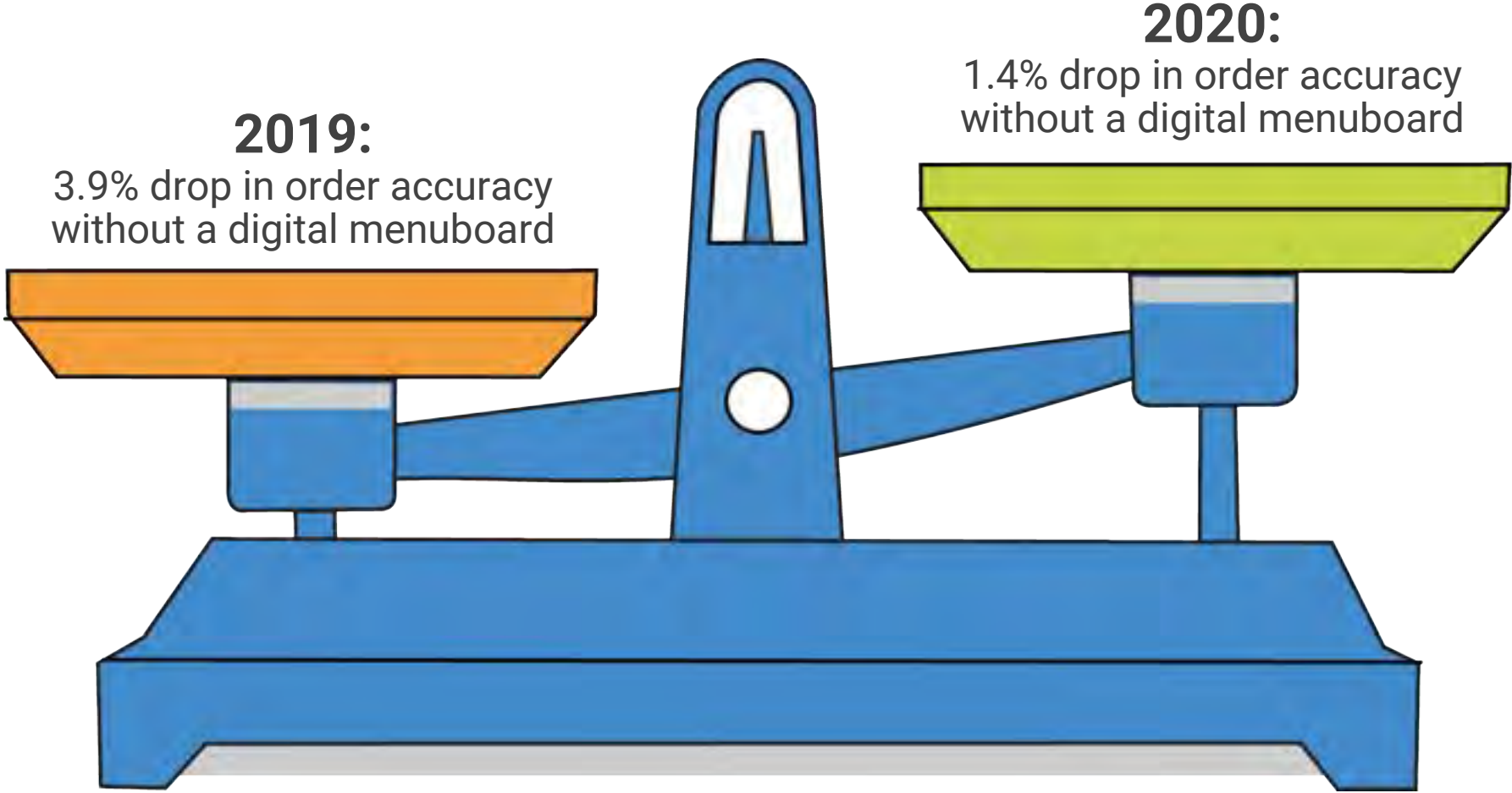
n=1,490; n yes=345

\*Average meal cost estimated at \$6.83.  
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Brands should use their own timing and average purchase point to determine their own potential loss.

# ACCURACY WITHOUT DIGITAL MENUBOARDS

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



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?

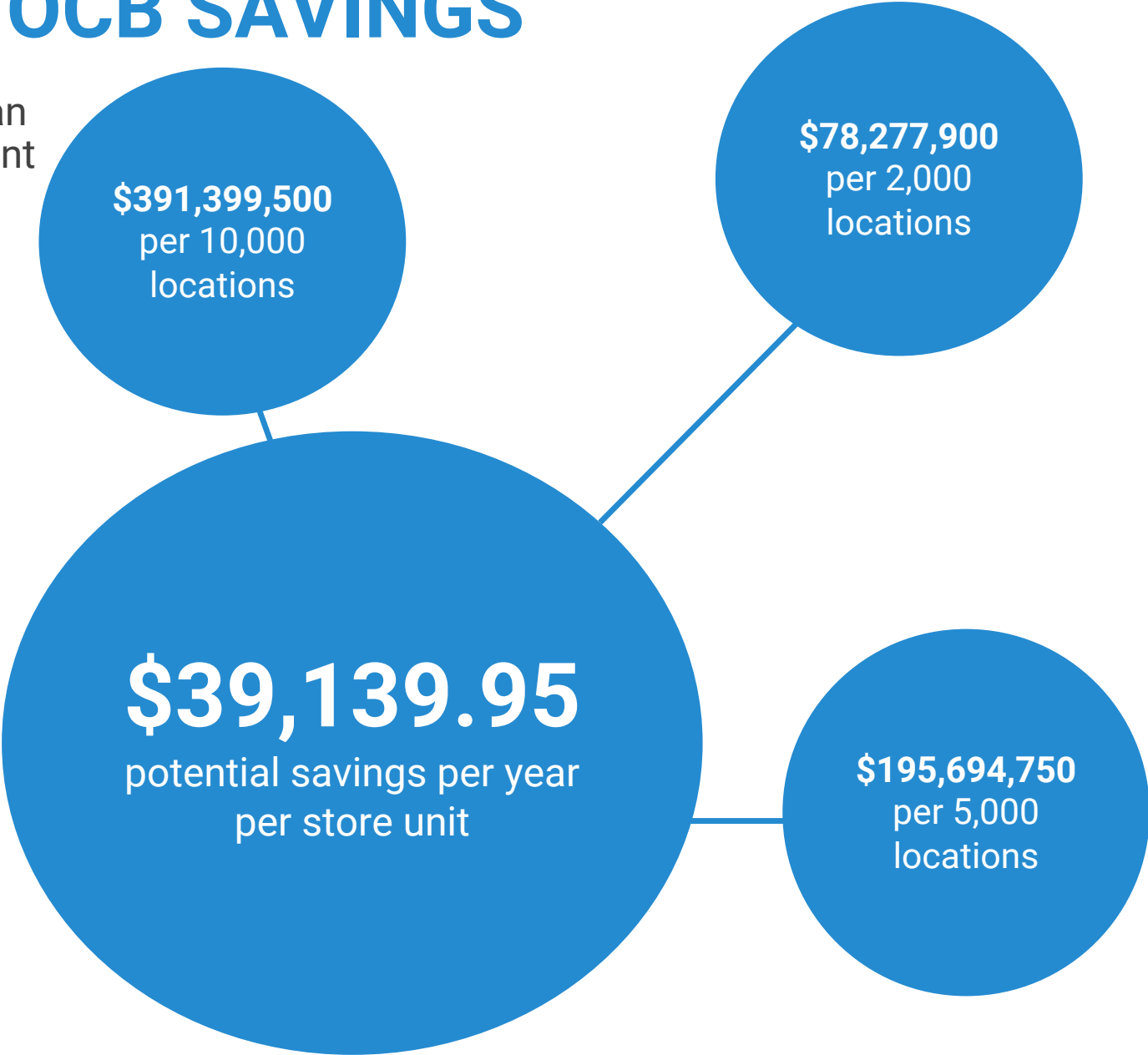
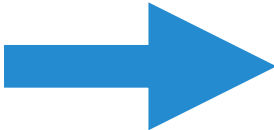
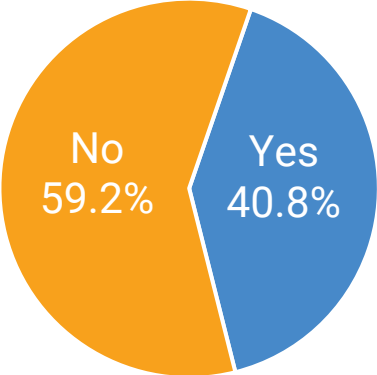
Q20. Was your drive-thru order filled correctly and completely accurate?

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# CALLING ATTENTION TO OCB SAVINGS

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?



Service Time – with OCB  
**228.0 seconds**



Service Time – without OCB  
**245.4 seconds**

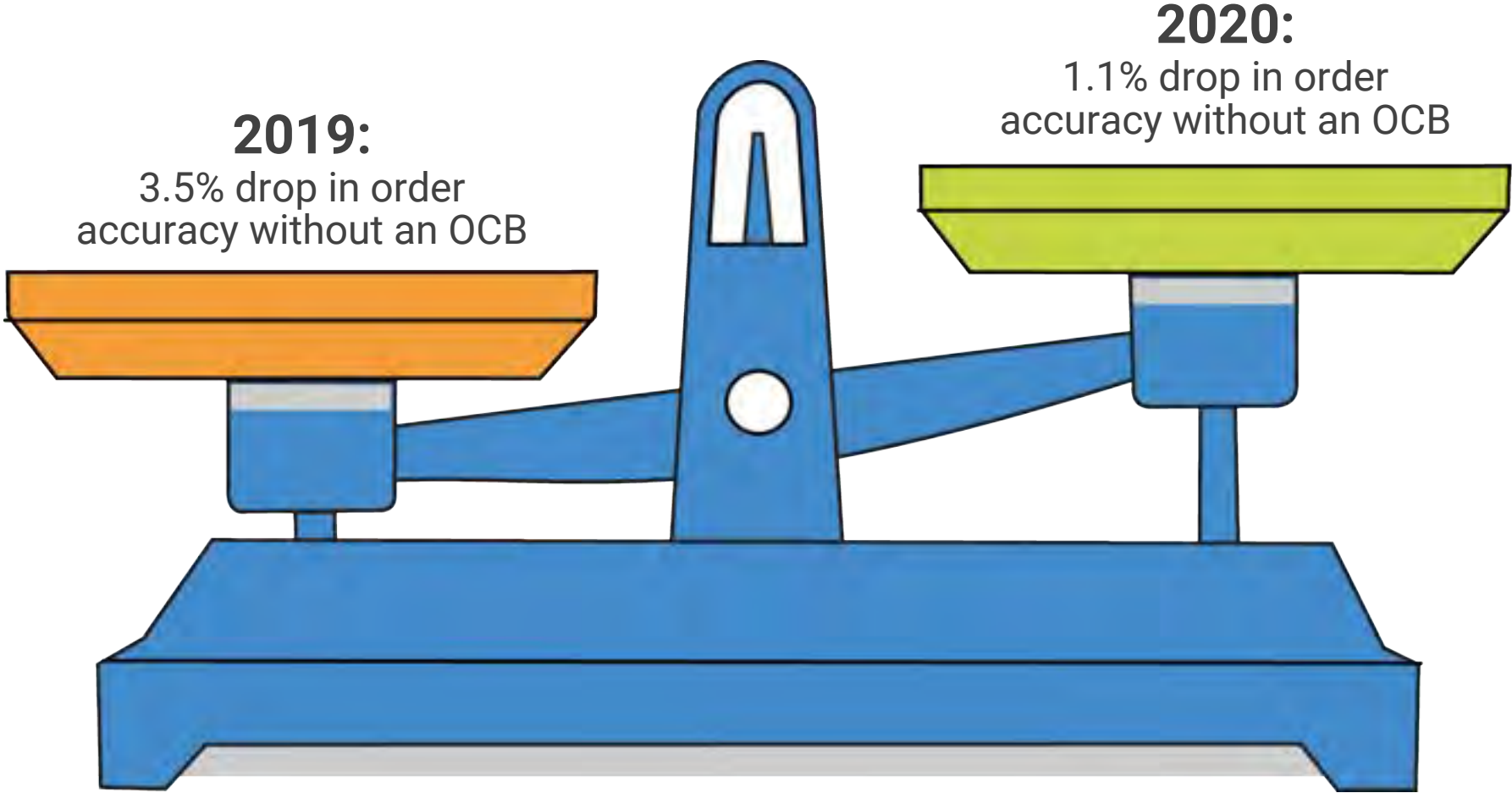
n=1,490; n yes=608

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# CLOSING THE GAP: OCBS & ORDER ACCURACY

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



n OCB=608 when comparing OCB accuracy to non-OCB accuracy in each individual year

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

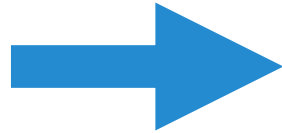
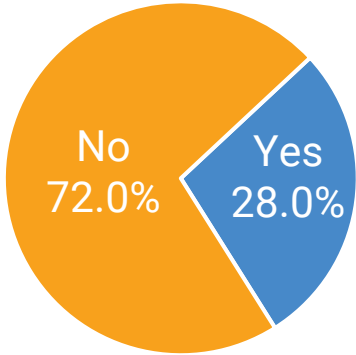
Q20. Was your drive-thru order filled correctly and completely accurate?

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# 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?



**\$162,060,000**  
per 10,000  
locations

**\$32,412,000**  
per 2,000  
locations

**\$16,206.00**  
potential savings per  
year per store unit

**\$81,030,000**  
per 5,000  
locations



Service Time – with Suggestive Sell  
**233.1 seconds**



Service Time – without Suggestive Sell  
**240.3 seconds**

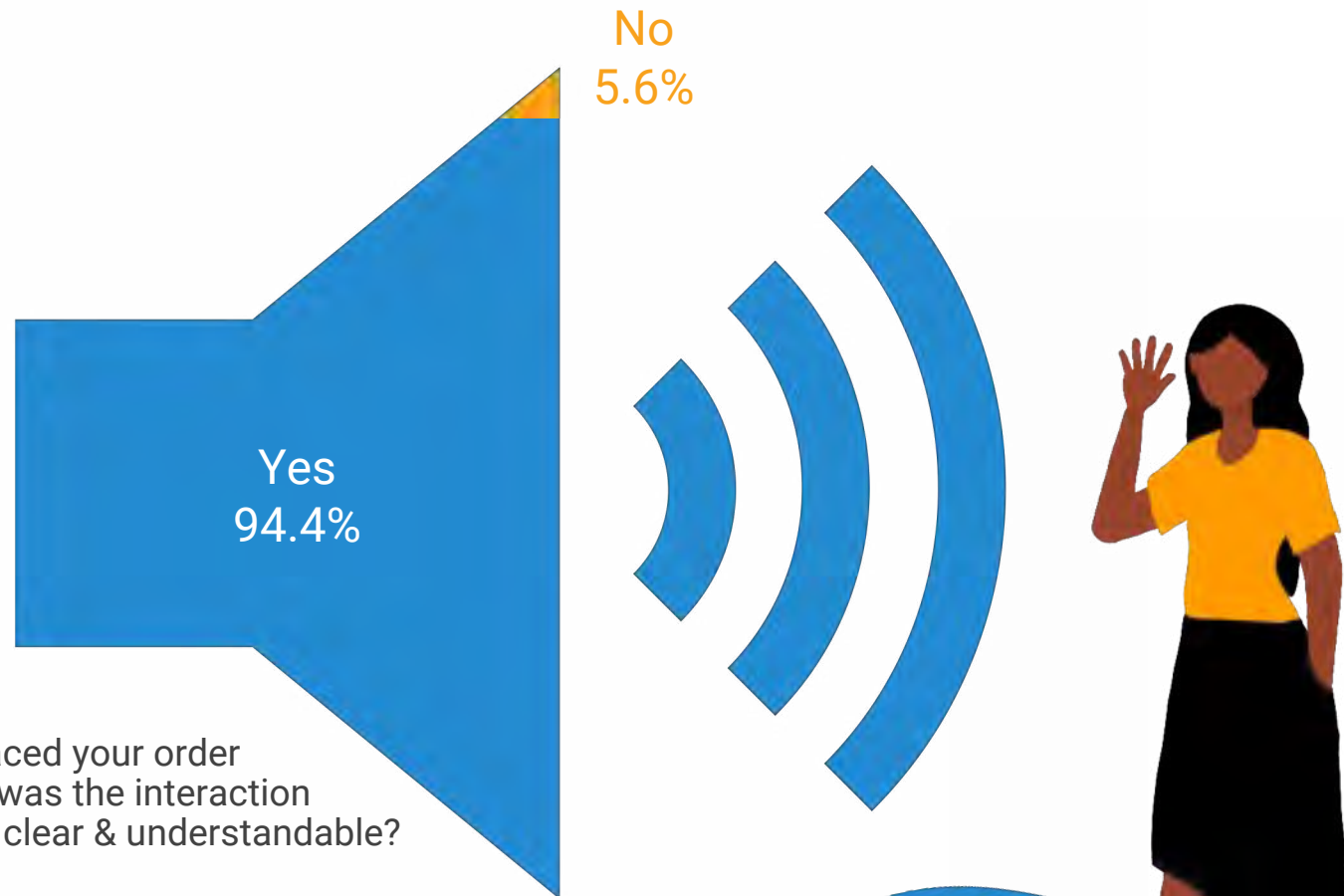
n=1,490; n yes=417

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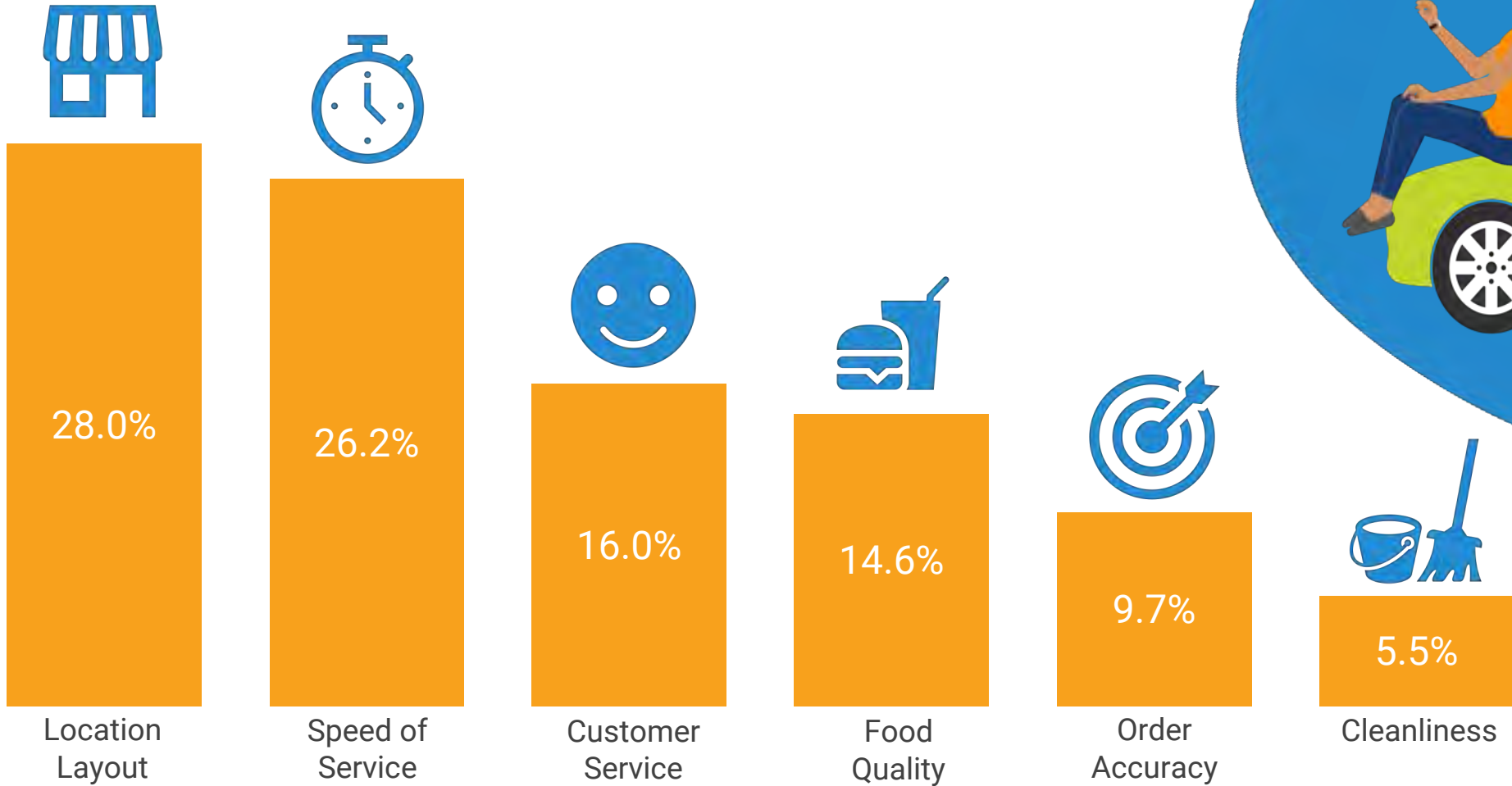
# BACK TO THE BASICS WITH SPEAKER CLARITY

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.



# NO SURPRISES IN IMPROVEMENT AREAS

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



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.  
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# 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.](#)

Ranking	1	2	3	4	5	6	7	8	9	10
Accuracy										
Customer Service										
Taste										
Speed										

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