

Emerging Experiences Study

Next-Gen Restaurants: The Rise of Innovation Experiences

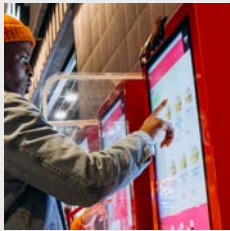
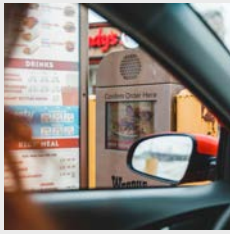


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About the Study

Intouch Insight's second edition of the **Emerging Experiences Study** examines the impact that new restaurant prototypes are having on the guest experience. To measure how these restaurant innovations are performing, we compared the experience of ten leading QSR brands' new prototypes to their legacy experiences.

Through this study, we aim to provide multi-location restaurants with data that can help them make informed decisions on where to invest and how to enhance their guest experiences.












Methodology

To measure brand performance, Intouch Insight sent mystery shoppers to visit three locations for each of the ten brands. This included one innovation location and two legacy locations, all in the same geographic area. Thirty visits were conducted for each location, for a total of 90 visits per brand.

We analyzed four distinct experiences during our visits: **kiosk ordering**, **mobile ordering for drive-thru pickup**, **mobile order for pickup at a window or locker**, and **drive-thru experience at a new prototype location**.

Our shoppers were instructed to order one main, one side, one beverage, and one customization.

Brands *included in the study*

Experience 1	Innovation: Order was placed via an in-store kiosk. Legacy: Order was placed at the counter.	 
Experience 2	Innovation: Order was placed via mobile app for drive-thru pickup. Legacy: Traditional drive-thru, or ordering via mobile app, and picking up in-store.	  
Experience 3	Innovation & Legacy: Order placed live in the drive-thrus.	   
Experience 4	Innovation: Order was placed via mobile app for pickup at a walk-up window or a food locker Legacy: Order placed via mobile app and picked up in store.	 

Definitions

Mystery Shop Score: The questionnaire included scoring for all of the key areas. This allowed us to calculate an overall score for each brand.

Wait Time: The amount of time passed from entering the drive-thru line to reaching the speaker to place the order.

Service Time: The amount of time passed from placing the order until reaching the food pick-up window.

Window Time: The amount of time passed from arriving at the pick-up window to receiving the entire order.

Total Time for Drive-Thru: The amount of time passed from entering the drive-thru to receiving the entire order.

Total Time for Kiosk: The amount of time passed from joining the kiosk line to receiving the entire order.

Total Time for Counter: The amount of time passed from joining the line at the counter to receiving the entire order.

Total Time for Mobile: The amount of time passed from opening the app to placing the order to receiving the entire order.

Executive *Summary*

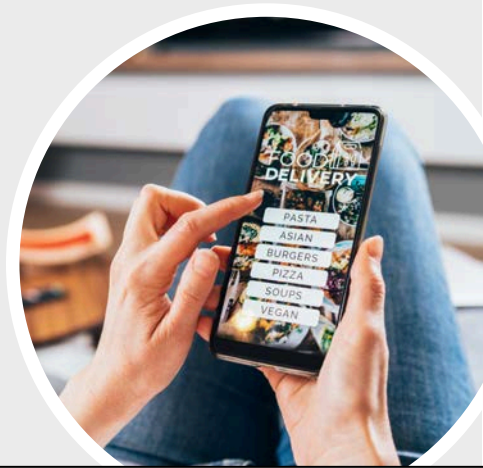
QSR restaurants are seeing the power of technology and are strategically investing in solutions that make their operations smoother and keep customers happy.

Over 60% of U.S. consumers order *delivery or takeout once a week*, and *more than half* of them *spend at least \$50 per order* when ordering food online.¹

With total sales from digital channels projected to be between 60-70% by 2025 for top QSR chains,² there is heavy investment being made to support improving these digital experiences, such as mobile kiosks, double drive-thru, innovative kitchens, walk-up windows and more.

To understand how these innovations are performing, we examined how the new prototypes performed compared to legacy locations, focusing major Quick Serve KPIs, like speed, accuracy, quality and satisfaction.

Dive into our **Emerging Experience 2024** Study report to learn if the new technology truly impacts the overall customer experience.



Pick-up surpasses *delivery* in *popularity*. In the US, *1 in 4 consumers opt for takeout*, often seeking a chance to leave home.³

Key *Findings*

- ▶ **3 out of 4** Innovation Experiences scored higher for **overall satisfaction** compared to their legacy counterparts.
- ▶ Technology innovations drove **speed improvements** for **digital orders placed for pickup**.
- ▶ **For 7 out of 10 brands**, the overall **mystery shopping scores** for the innovation experiences outperformed the legacy ones
- ▶ There was a **noticeable improvement in friendliness** in the innovation locations compared to the legacy experience.

Overall, the data paints a bright picture. The investments in these new restaurant prototypes are clearly paying off, with a dramatic improvement in the customer experience across the board.



SHAKE
SHACK



Experience 1:

In-Store Kiosk Ordering



Experience 1: Kiosks



More than *four out of five* Americans like using *self-service kiosks* and *66%* said that they prefer it over a manned checkout.⁴

With kiosks, customers can quickly browse the menu, easily customize the order, and pay within minutes. This leads to quicker customer turnaround and less manual labor.

What we measured:

- **Innovation Experience:** Order was placed via an in-store kiosk.
- **Legacy Experience:** Order was placed at the counter.

Kiosk experiences deliver *satisfaction*

Overall, mystery shopping scores were *higher* for the *kiosk experience* at both the brands we evaluated compared to the legacy ordering experience, as well as *satisfaction with all parts of the experience*.

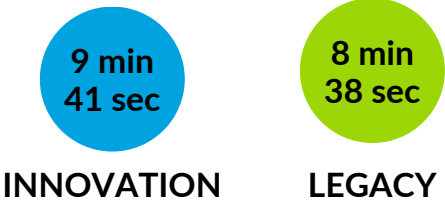


Satisfaction	Innovation	Legacy
Order Experience	93%	89%
Pickup Experience	98%	93%
Overall Satisfaction	95%	94%

However, orders placed at the *counter directly with an employee* were on average *almost one minute faster* than orders placed at a kiosk.

Order accuracy was *5% higher* for innovation experiences, coming in at *97% for kiosk orders*, compared to orders placed at the counter.

Total Time



In the Spotlight: *Burger King Sizzle*

Overall, the *innovation* experience performed *much better* than the legacy experience in almost *every single metric*.

Burger King's new restaurant concept, introduced in fall 2023, is designed to shorten wait times, enhance the digital ordering experience, and simplify employees' workspaces. The Sizzle prototype features digital ordering kiosks, dedicated pick-up areas, walk-up windows, and double-lane drive-thrus.

Burger King's new restaurant concept is designed to shorten wait times, enhance the digital ordering experience, and simplify employees' workspaces.



Mystery Shop Score
94% Innovation
83% Legacy



Brand *Performance Metrics*

Friendliness for the Sizzle location was **90%** compared to **87%** for the *legacy experience*.

The *total kiosk experience time* was **faster** than that of the legacy experience by an average of **20 seconds**.

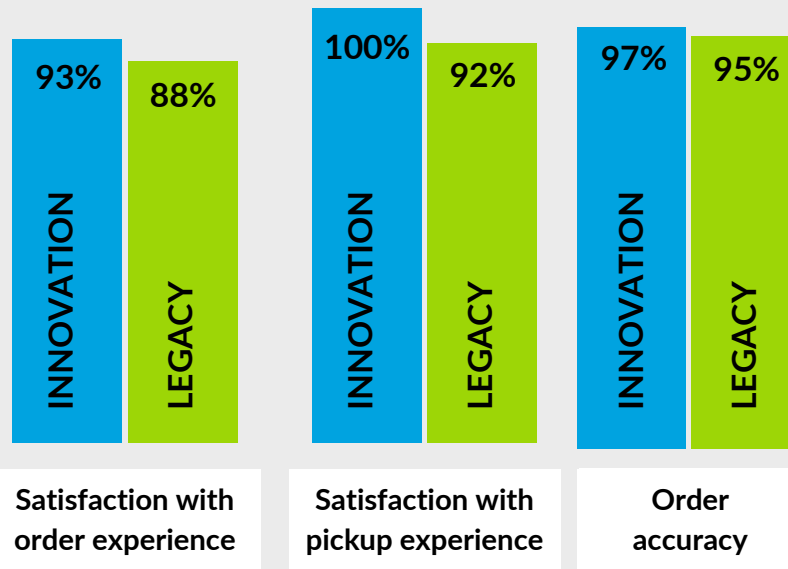


Photo source: <https://www.qsrmagazine.com/operations/fast-food/step-inside-burger-kings-sizzle-restaurant-of-the-future/>



In the Spotlight: Shake Shack



Order accuracy was **8% higher** at the **innovation location**, and **food temperature scored 100%**.

Shake Shack revealed last year that self-service kiosks account for 50% of their in-store sales, while digital sales, including kiosks, web, app, and delivery, make up roughly 80% of the growing brand's total sales.

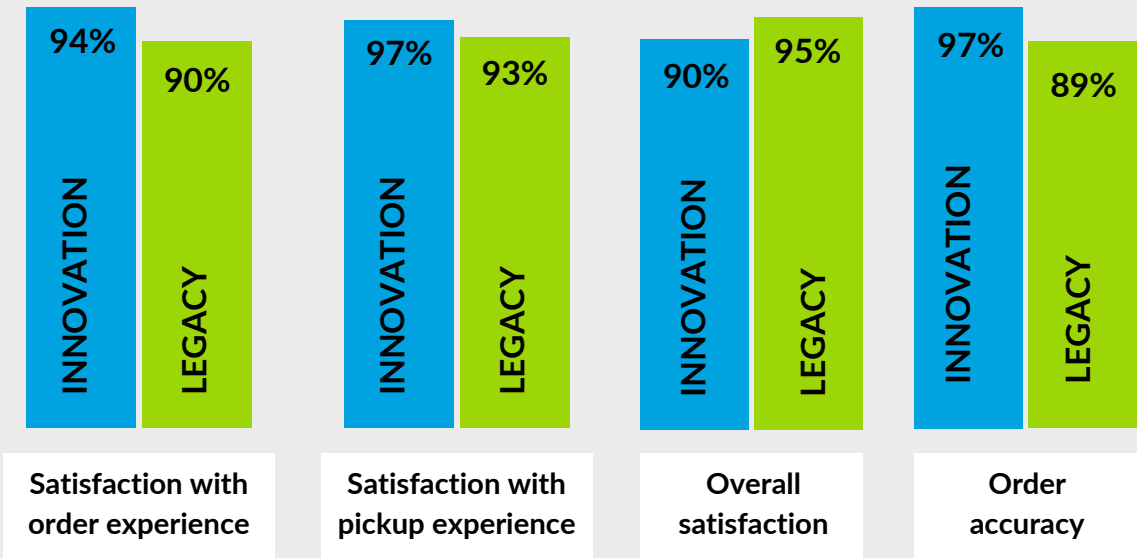
The company is actively working to ensure they have a self-kiosk in all of their restaurants. The burger chain says that customers prefer them over in-person ordering. This move is expected to boost their profits and lower their labor costs.



Brand **Performance Metrics**

55% of shoppers said they were **offered a suggestive sell** while placing their order at the **kiosk**, compared to only 41% of shoppers placing orders with a staff member.

The **total kiosk experience time was slower** than that of the legacy experience by over 2 minutes on average.



Experience 1:

Final Thoughts

SHAKE
SHACK



In-Store Kiosk Ordering

Our findings indicate that consumers are receptive to kiosks, finding them easy to use and time-saving. They appreciate that the technology enables effortless customization and the ability to view all their options in one place, especially due to the pictures.

But beyond the technology, it is important for brands to consider the entire user experience when investing in kiosk technology.

For instance, if kiosks are placed near windows, the screen may be difficult to read when the sun is shining. So brands may need to consider window shades or other solutions to eliminate glare from their kiosks.

Additionally, ensuring that kiosks can quickly and accurately process orders further enhances customer satisfaction. Feedback suggests that users value the immediacy and convenience kiosks offer, making it crucial for businesses to maintain the functionality and accessibility of these devices.

Insights from the field: What a shopper had to say.

"The kiosks are located in the front of the store, and the sun makes it super difficult to see the kiosk screens."



Experience 2:

Mobile Order for Drive-Thru Pickup



Experience 2: Mobile Order for Drive-Thru Pickup



47% of U.S. consumers would simply **avoid** going to a restaurant that **doesn't have a drive-thru**.⁵

Precipitated by the pandemic, in the early 2020's many brands accelerated and increased their investment in digitizing and redesigning their drive-thrus. From dedicated pickup lanes to smaller footprint restaurants, the investment has been significant.

What we measured:

- **Innovation Experience:** Orders were placed via mobile app for drive-thru pickup. The shopper was asked to drive to the restaurant and place their order while in the parking lot.
- **Legacy Experience:** Taco Bell and Panera Bread orders were traditional drive-thru, while Chipotle's legacy experience involved parking, ordering via mobile app, and picking up in-store.



Tech Innovation Boosts Customer Satisfaction

Overall satisfaction was **5% higher** at the **innovation experiences** compared to the legacy experiences.

But, it wasn't always faster. For the innovation experience, **orders** were mostly **ready after** projected **pickup time**.

- Percentage of orders ready before projected pickup time: **11%**
- Percentage of orders ready at projected pickup time: **25%**
- Percentage of orders ready after projected pickup time: **64%**

Satisfaction	Innovation	Legacy
Order Experience	91%	95%
Pickup Experience	88%	92%
Overall Satisfaction	92%	87%

Order accuracy was **11% higher** at the **innovation** experience.

However, in comparing the traditional legacy drive-thru experiences measured at Taco Bell and Panera Bread, the data shows that **by moving the ordering process out of the drive-thru to a digital experience**, the **time customers spent in the drive-thru was reduced by 2 minutes and 13 seconds. on average**.



In the Spotlight: *Taco Bell Go Mobile*



The *innovation* experience scored **100%** for *order experience, pickup experience, and overall satisfaction.*

Mystery Shop Score
92% Innovation
85% Legacy

Taco Bell launched the Go Mobile prototype, using technology to streamline the ordering process, improve accuracy, and prioritize digital experiences. The ultimate goal is for 100% of sales to be digital.

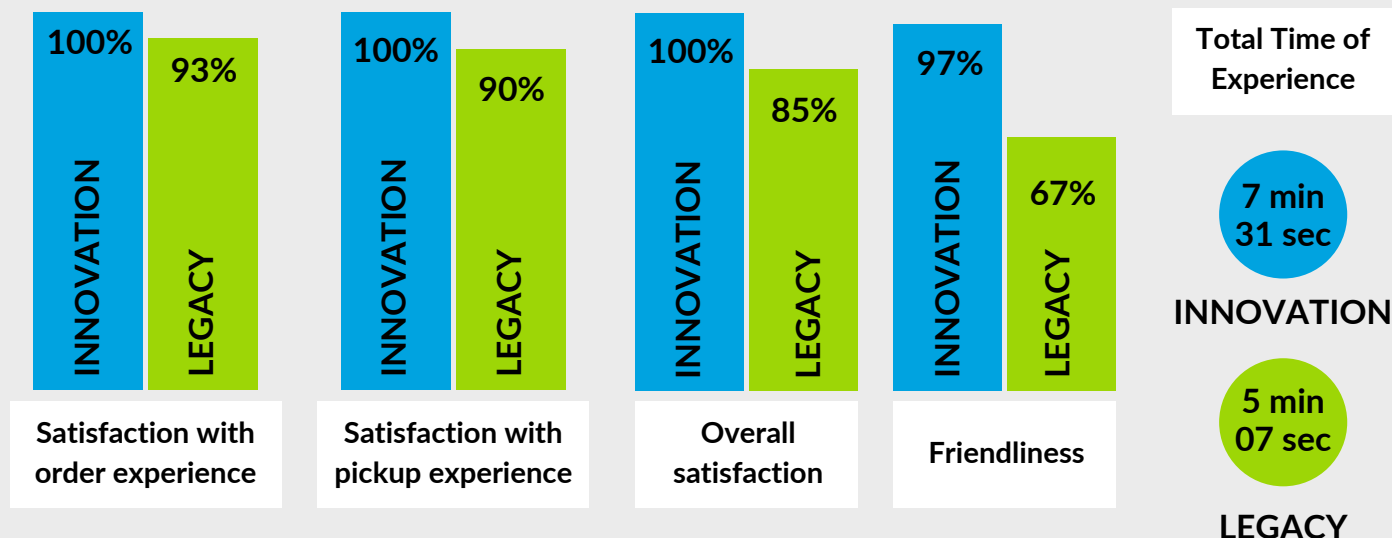
The Go Mobile prototype features a smaller building with a dual drive-thru and a priority pick-up lane, which offers quick service for customers who order through Taco Bell's app, smart kitchen, and curbside pick-up.



Brand *Performance Metrics*

20% of shoppers said they were *offered a suggestive sell* while placing their order *via the app*, compared to only 3% of shoppers placing orders live in the drive-thru.

Friendliness was rated a staggering **30% higher** for the innovation experience compared to the legacy experience, suggesting that the streamlined store operations improves the employee experience as well.



Total time customers spent in the drive-thru was *reduced by an average of 1 minute and 29 seconds* at the innovation experience.



In the Spotlight: Panera NextGen



Mystery Shop Score
86% Innovation
88% Legacy

Time spent in the *drive-thru* was *shorter* for the *innovation* experience compared to the *legacy*.

Panera NextGen was designed with guests and employees in mind. It is tech-enabled in the front and back of the house, so the brand uses technology to simplify and optimize employee and customer experiences, and features a double drive-thru with one dedicated lane for mobile orders.

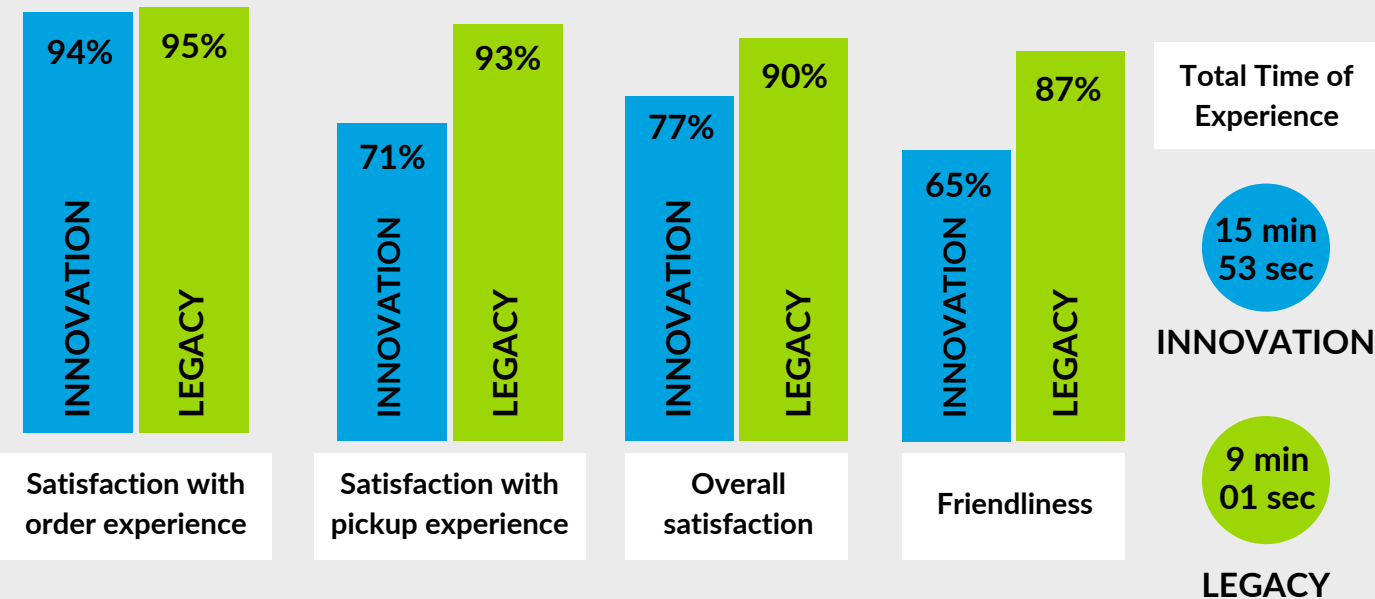
Despite the NextGen prototype's improved performance with regard to accuracy and speed, satisfaction scores were lower compared to its legacy experience.



Brand *Performance Metrics*

Order accuracy for the Panera NextGen location was *97% compared to 83%* for the *legacy experience*.

61% of shoppers said they were *offered a suggestive sell* while placing their order at the *Panera NextGen*, compared to only 22% with the legacy experience.



Total time customers spent in the drive-thru was *reduced by an average of 3 minutes and 53 seconds* at the innovation experience.



In the Spotlight: Chipotlane Digital Kitchen

High marks for *accuracy*, *food quality*, and *friendly service* translate into **100% Overall Satisfaction** rating for this innovation experience.

Their Chipotlane Digital Kitchen prototype is specifically designed to enhance customers' digital experience and remove friction and features a smaller footprint with no dining area.

The restaurant has been equipped to accept digital orders through its app or website, and customers can collect their orders through the drive-thru or inside the restaurant.

It's important to note that traditional Chipotle locations don't offer drive-thru ordering. To compare, our shoppers placed their orders through the app and picked it up at the restaurant.



Mystery Shop Score

88% Innovation

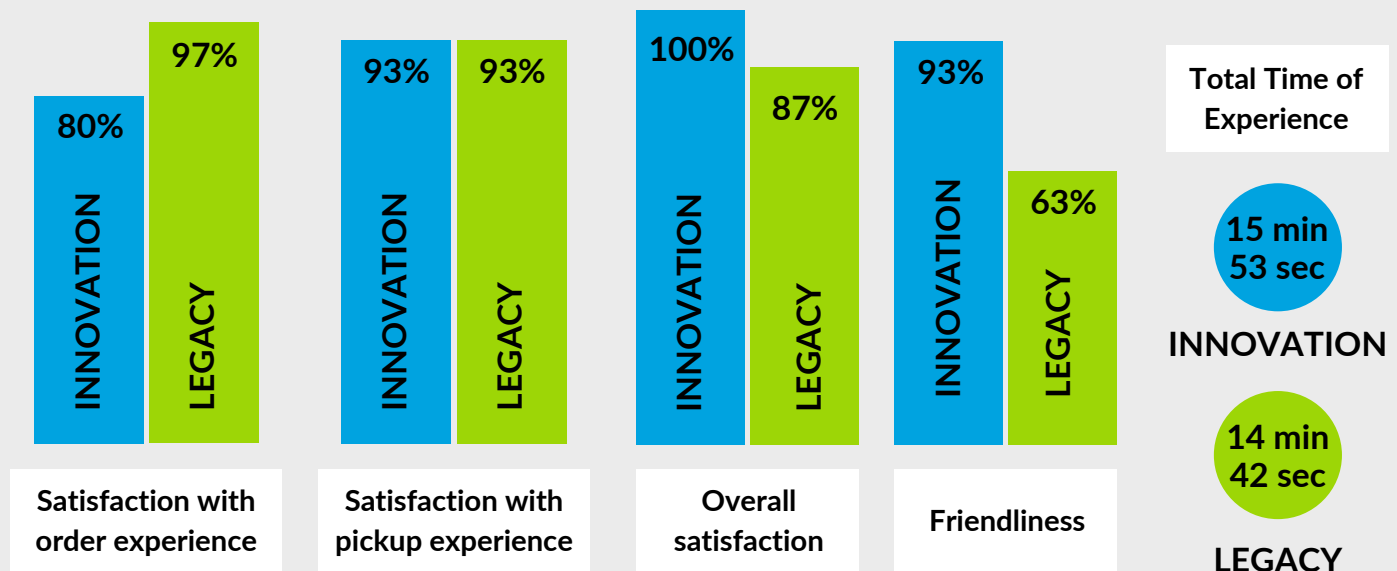
86% Legacy



Brand *Performance Metrics*

Order accuracy for the Chipotlane Digital Kitchen location was **90% compared to 77%** for the *legacy experience*.

Temperature and *taste* were also rated higher at the innovation experience, suggesting that the *kitchen investments are also paying off*.



Experience 2:

Final Thoughts



Mobile Order for Drive-Thru Pickup

Technology can certainly improve the efficiency of drive-thru services, and as we saw, reduce the time spent by customers in the drive-thru, but it's not the only determining factor that affects the customer experience. The physical layout of the drive-thru, including having a separate lane for mobile pickups, is also crucial in avoiding delays and ensuring timely service. Additionally, factors such as weather protection can significantly impact customer satisfaction.

What our shoppers revealed was that while dedicated mobile pickup lanes improve speed and efficiency, when dedicated mobile and regular lanes merge into one, the customer can experience delays.

We also discovered that regardless of how impressive the technology, not having proper awnings or coverings in the drive-thru can result in a compromised experience with rain entering the customer's vehicle during pickup.

Insights from the field: What a shopper had to say.

"My order was likely ready on time, but because I was in line behind someone who had just placed an order at the speaker, I was unable to reach the window until six minutes past the projected time."





Experience 3:

Drive-Thru Order at New Prototype



Experience 3: Drive-Thru Order at New Restaurant Prototype

It is estimated that *Americans* visit *drive-thru lanes* around *6 billion times each year*.

For many leading Quick Service Restaurants, sales from drive-thrus account for over 70% of their revenue.⁶ That is why, in recent years, we’ve seen huge investments in drive-thru technology, design and infrastructure.

The three brands selected for this experience have all tested different ways of enhancing the drive-thru experience.

What we measured:

- **Innovation and Legacy Experiences:** Shoppers placed their orders live in the drive-thrus.



Investment in Tech Delivers Clarity for Guests

All three *innovation* experiences scored *100%* when shoppers were asked if the *interaction via the speaker was clear and understandable*.



	Innovation	Legacy
The interaction with the speaker clear and understandable	100%	95%
Shopper did not have to repeat the order	78%	71%
Satisfaction with order experience	94%	93%
Satisfaction with pickup experience	90%	94%
Overall satisfaction	91%	93%
Total time	6 min 4 sec	4 min 50 sec

In the Spotlight: Wendy's Global Next Gen



Friendliness was **13% higher** at Wendy's Global Next Gen restaurant.

Wendy's launched its Global Next Gen prototype in the spring of 2023 to enhance customer experience across ordering channels and streamline operations for its employees. New designs and technology are expected to deliver better returns for franchisees.

The prototype features a dedicated pick-up window and parking for delivery drivers to take pressure off the drive-thru line, as well as a galley kitchen that runs from front to back of the house to increase efficiency.



Mystery Shop Score
92% Innovation
89% Legacy

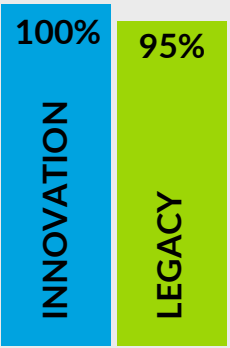
Brand **Performance Metrics**

37% of shoppers said they were **offered a suggestive sell** while placing their order at the **Wendy's Global Next Gen**, compared to only 20% with the **legacy experience**.

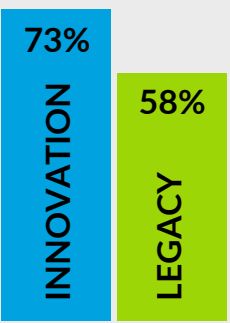
Friendliness for the Wendy's Global Next Gen location was **90% compared to 77%** for the **legacy experience**.

	Innovation	Legacy
Total time	7 min 25 sec	4 min 3 sec

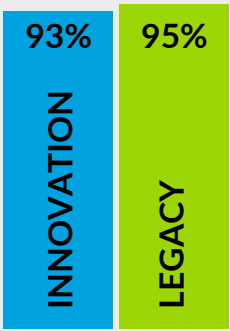
	Innovation	Legacy
Window time	2 min 8 sec	1 min 36 sec



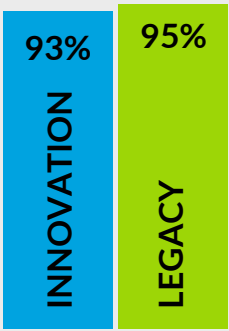
The speaker was clear and understandable.



Shopper did not have to repeat the order



Satisfaction with order experience



Overall satisfaction



In the Spotlight: Jack in the Box Drive-Thru only prototype

Jack in the Box’s Drive-Thru only prototype is *faster* than its legacy drive-thru experience.

In 2022, Jack in the Box launched a new Drive-Thru-only prototype. The prototype was designed for digital ordering to reduce construction costs. It features a double y-lane drive-thru, dual assembly kitchens, and a dedicated pickup window for mobile and third-party delivery orders.

The innovation location outperformed the legacy drive-thru in most of the time metrics with an average weekly sales of over \$40,000 in less than nine months after opening.



Brand Performance Metrics

Wait times at the *Drive-thru only prototype* were on average *12 seconds faster*, at 33 seconds, compared to 45 seconds for the legacy experiences.

	Innovation	Legacy
Total time	5 min 42 sec	5 min 49 sec

	Innovation	Legacy
Window time	2 min 35 sec	2 min 52 sec



In the Spotlight: Checkers & Rally's Restaurant of the Future



Satisfaction with the *order experience* was **8% higher** at the *innovation* location.

Checkers & Rally's is ahead of the curve when it comes to adopting cutting edge drive-thru technology. Their locations feature double drive-thrus, modular buildings, and closed kitchens, and as of 2021, AI voice technology in the drive-thru.

According to brand statements, locations with improved design and AI features opened in 2021 with big success. The AI feature was found to be better at upselling and learning on the go.



Mystery Shop Score
88% Innovation
89% Legacy

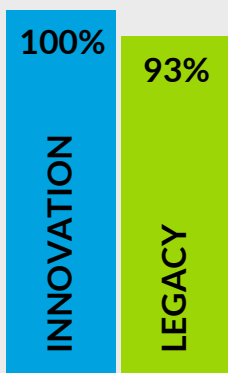
Brand *Performance Metrics*

61% of shoppers reported being *offered an upsell* at a Checkers & Rally's location, compared to 42% for the study overall.

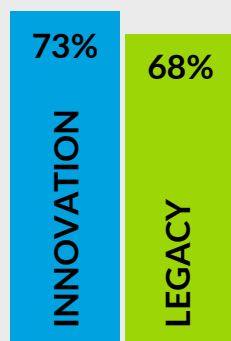
All but one of the shoppers visiting Checkers & Rally's Restaurant of the Future *knew they were interacting with an AI*.

	Innovation	Legacy
Total time	5 min 8 sec	4 min 53 sec

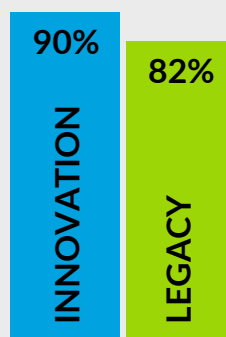
	Innovation	Legacy
Window time	1 min 59 sec	1 min 35 sec



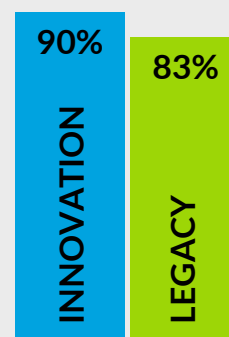
The speaker was clear and understandable.



Shopper did not have to repeat the order



Satisfaction with order experience



Overall satisfaction





Experience 3:

Final Thoughts

Drive-Thru Order at New Restaurant Prototype

Although the innovation locations included in this experience didn't always outperform their legacy counterparts, what is coming through crystal clear is that the technology is working.

Our shoppers report that the speakers were clear and understandable 100% of the time, and shoppers only needed to repeat themselves 22% of the time. In comparison to the **2023 Annual Drive-thru study**, this puts these new prototypes ahead of the competition, with speakers receiving a score of 87% for clarity, and 26% of shoppers said they had to repeat their order.

When introducing new technology into the drive-thru, or any, experience, it is important to keep in mind that technology is just one aspect of the experience, and ensuring guests receive a fast, frictionless and pleasant experience is what will keep them coming back.

Insights from the field: What a shopper had to say.

"The employee I interacted with was very polite and professional. Service was quick."





Experience 4:

Mobile Order for Pickup at Locker/Window



Experience 4: Mobile Order for Pickup at Locker/Window

ZAXBY'S



According to recent surveys, *almost half* of all consumers *prefer to pick up* their restaurant *orders* themselves instead of having them delivered.⁷

Additionally, 70% of people prefer to order directly from the restaurant because they do not want to give their money to a third-party delivery service.⁸

What we measured:

- **Innovation Experiences:** Shoppers drove to the restaurant, parked and ordered through the mobile app for pickup at a walk-up window (Zaxby's) or a food locker (Whataburger).
- **Legacy Experiences:** Shoppers drove to the restaurant, parked, and ordered food via the mobile app and walked into the store to pick up.



Streamline the Experience, Boost *Satisfaction*

Customers at *Innovation* experiences were *more satisfied* with the *streamlined, low-interaction pickup process*, resulting in *9% higher satisfaction* with the pickup experience and 7% higher overall satisfaction compared to Legacy Experiences.

Satisfaction	Innovation	Legacy
Order Experience	98%	98%
Pickup Experience	97%	88%
Overall Satisfaction	97%	90%

The *innovation* experiences were, on average, *2 minutes and 22 seconds faster* than the legacy experiences.

Innovation experiences were able to get more *orders* out ahead, or at the *projected pickup times*.

- Percentage of orders ready before projected pickup time: **Innovation - 45% and Legacy - 32%**
- Percentage of orders ready at projected pickup time: **Innovation - 32% and Legacy - 26%**
- Percentage of orders ready after projected pickup time: **Innovation - 23% and Legacy - 42%**



In the Spotlight: Zaxby's Off Prem

Friendliness was **18% higher at the innovation** location compared to the **legacy** locations.

The innovation location we visited is the first franchise-owned, to-go-only Zaxby's restaurant in the USA, which opened in the summer of 2023. This new prototype design is two-thirds the size of their traditional restaurants and is designed for quick and efficient pickup service, with no dine-in seating available.

The location features a walk-up window and an outdoor patio with four tables.

ZAXBY'S



Mystery Shop Score

95% Innovation

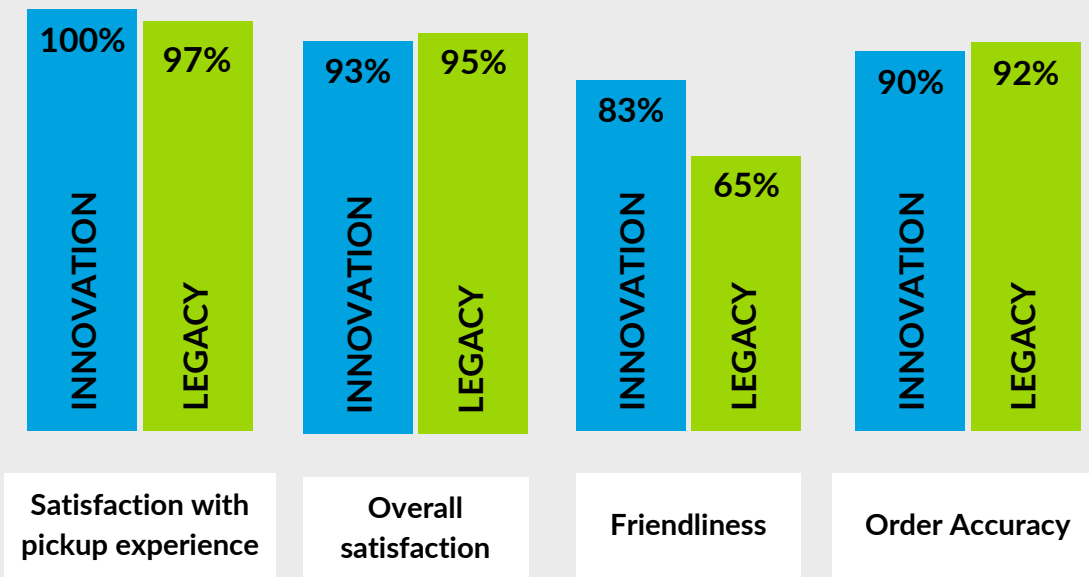
93% Legacy



Brand **Performance Metrics**

Total time was **3 minutes and 23 seconds faster** on average at the **innovation** experience compared to the legacy experience.

We found that the walk-up window makes it harder to mix up orders. In fact, **53% of shoppers** reported that **picking up someone else's order by mistake at the innovation location would be hard** compared to only **37% at the legacy stores**.



In the Spotlight: Whataburger - Digital Kitchen



Mystery Shop Score
88% Innovation
86% Legacy

Overall satisfaction with the innovation experience scored **100%**. This was **15% higher** than overall satisfaction at the legacy locations.

In the fall of 2023, Whataburger launched its Digital Kitchen with the objective of reducing order times and making the ordering process more convenient for customers. The store is entirely cashless, has no indoor seating, and is focused on mobile ordering.

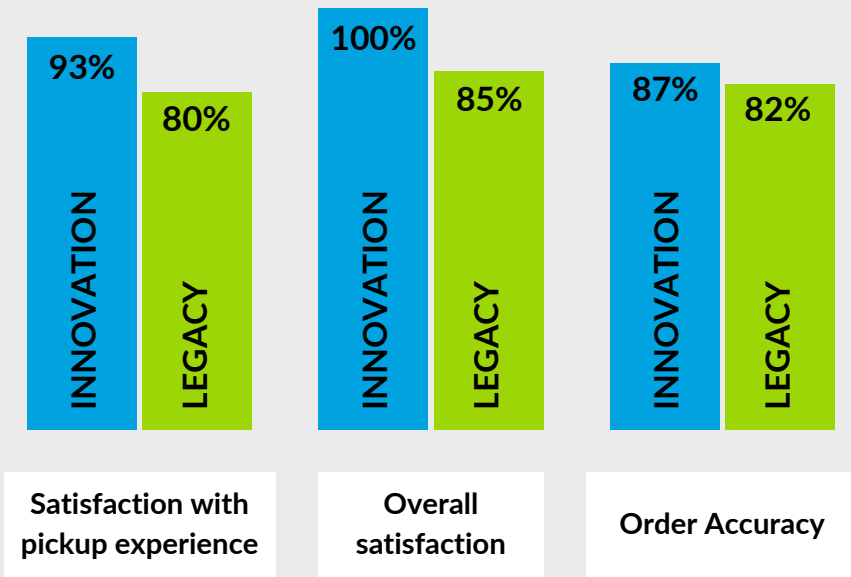
Customers can place their orders through the app for pickup in weather-resistant food pick-up lockers. The results revealed that consumers appreciate the new pickup concept, with a score of 94% for the pickup experience, compared to 80% for the classic Whataburger locations.



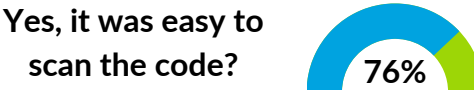
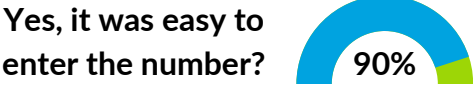
Brand *Performance Metrics*

Total time at the *innovation* experience was **1 minute and 21 seconds faster** on average than the legacy locations.

All shoppers could clearly identify that there were *dedicated parking spots* for pickup at the innovation location, compared to **60% for legacy**.



When *accessing the locker*, customers found it *easier to enter a number* as opposed to scanning a code.





Experience 4:

Final Thoughts

Mobile Order for Pickup at Locker/Window

Our results suggest that customers appreciate self-service lockers for order pickup for their convenience, as they provide a sense of independence and efficiency. Customers can retrieve their orders quickly without needing to interact with staff, which is a significant advantage.

However, customers may experience frustration if the app malfunctions or if poor signage makes it difficult to locate the lockers, leading to unwanted interactions. Customers appreciate the organization and promptness of the service, with many highlighting the short wait times as a significant benefit of the experience.

To maintain the positive aspects of self-service locker systems and prevent negative customer experiences, it is crucial to ensure that the technology and signage are user-friendly and reliable.

Insights from the field: What a shopper had to say.

"Most memorable was the incredible efficiency and speed with which the food was prepared and delivered and the ease of picking it up."



Closing Remarks

Brands are investing heavily in new technology, designs, and infrastructure in order to increase efficiency, increase profitability, and drive guest loyalty.

With the continued growth in digital ordering, customers have shown a strong preference for customization. A common complaint we saw across all four experiences was the inability to easily customize their orders, especially with regard to ordering “no ice” in their drinks, which reinforces today’s guests’ desire for control over their orders and sensitivity to mistakes.

The results show that friendliness significantly impacts overall satisfaction and the customer experience. However, customers can be fickle and find it frustrating when forced to interact with staff despite promises of a seamless digital experience.

As multi-location brands continue to invest and experiment with emerging technologies, they should also:

- ▶ Focus on improving customer service and investing and maintaining ordering technology, such as kiosks and improved drive-thru systems.
- ▶ Ensure that these innovations align with clear, mistake-free customization options and genuine customer service.
- ▶ Invest in clear signage and high-quality speakers to further improve the overall drive-thru experience.

Consistently measuring customers' experience is the best way to ensure that investments and innovations are paying off. This allows brands to quantify their efforts' impact and quickly identify improvement areas.

About *Intouch Insight*

At Intouch Insight, we specialize in helping multi-location brands achieve operational excellence, exceed customer expectations, and build long-term customer loyalty. As a North American company, we are proud to deliver growth solutions to over 300 of the continent's most beloved brand.

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.

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