

2025

Quick Service Restaurant Benchmark Study

PART TWO

BY **FIELD AGENT**® + **KANTAR**



Details of the QSR Survey

Phase two of a two-part benchmark study was conducted by Field Agent and Kantar from January 10-31, 2025 — surveying 150 customers on top QSR industry issues. Each customer was given \$8 to go to the restaurant, order their choice of food, and give their honest perception.

50 respondents ordered Dine In, 50 ordered Drive Thru, and 50 ordered through Mobile Order.

Two identical surveys were conducted: one in the US, one in the UK.

Shoppers were sampled from part one of the QSR survey completed September 2024. Demos: Gender - Female (76.0%), Male (23.3%), Prefer Not to Say (0.1%), Age - 18-29 (11.4%), 30-39 (34.2%), 40-49 (33.6%), 50+ (20.7%); Household Income - < \$35K (13.0%), \$35-49K (13.7%), \$50-74K (17.6%), \$75-99K (16.0%), \$100-125K (11.5%), \$125K+ (20.6%), Prefer Not to Say (7.6%); Race/Ethnicity - Caucasian/White (70.4%), Asian American (10.6%), Latino/Hispanic (9.2%), African American/Black (4.2%), Native American (0.7%), Other (4.9%).

About Us

FIELD AGENT

Founded in 2010, Field Agent is a leading provider of audits, insights, and product evaluations for QSR chains. With a global panel of more than three million crowd-sourced everyday shoppers, Field Agent captures and analyzes in-store data to help brands optimize their operations and make informed decisions regarding guest experiences and food.

KANTAR

Kantar is a global data, insights, and consulting company that helps businesses understand consumer behavior, market dynamics, and brand performance. With expertise in research, analytics, and media measurement, Kantar provides comprehensive solutions that drive business growth and transformation.

Executive Summary

The 2025 QSR Benchmark Study reveals key shifts demanding focused action from operators and CPG brands. Success requires a strategic shift towards granular channel optimization: prioritizing digital excellence for quality and loyalty, relentlessly improving drive-thru efficiency for larger orders, and universally enhancing loyalty programs to meet clear consumer demands for value and ease.

1. Capitalize on Mobile Order Dominance & Quality

Mobile ordering is the clear leader in perceived food quality (66% warm, 74% fresh) and loyalty engagement (42% app usage). This channel represents a powerful opportunity for QSRs to market superior product delivery and deepen digital relationships through personalized loyalty offers (66% desire for personalization).

2. Optimize Drive-Thru for Speed, Accuracy, and

Group Orders The drive-thru generates the highest "most common spend" (\$26.99), indicating its crucial role for family and group purchases. However, it lags in speed and accuracy (94% accurate, 29% in ≤ 2 minutes), with customers explicitly requesting improvements. QSRs must invest in technology and training to enhance efficiency for complex orders.

3. Revitalize Loyalty Programs for Engagement &


Value: Despite varying usage, consumers universally demand "more appealing rewards" (54-66%) and "more frequent promotions" (48-60%), alongside "easier redemption." Current programs are underperforming in perceived value. QSRs must redesign loyalty to offer personalized, higher-value incentives seamlessly integrated, especially within mobile apps.

4. Address Menu Clarity & Appeal Gaps

While health information is highly available on mobile (96%), only 10% of users convert, indicating a need for "craveable healthy" innovation. Similarly, impulse buys like desserts (2% mobile impact) and add-on beverages (15% mobile impact) struggle in digital channels. QSRs must refine menu presentation for easy discovery, particularly for value and health options.

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Menu Clarity and Impact on Purchase Decisions

Menu Clarity Impacting Purchases

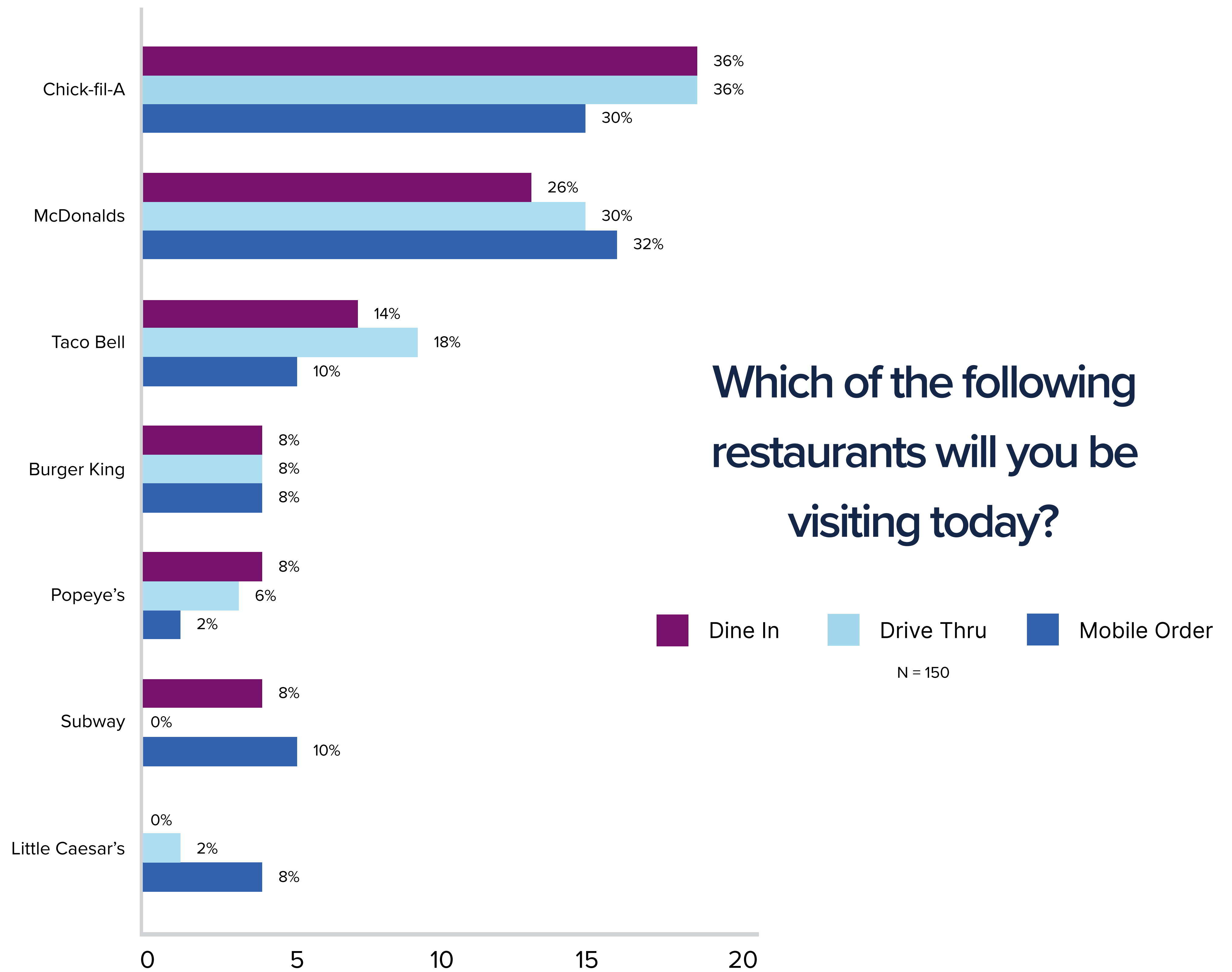
While value menus are widely available (54-60%), their ease of discovery seriously impacts purchase behavior. When customers have more time to browse in dine-in settings, a high 70% find value menus easy to locate, contributing to a 15% conversion rate for those who change their mind to purchase. This shows that **a well-displayed physical menu or in-store signage is highly effective.**

However, the drop-off in ease of finding for drive-thru (50%) and especially mobile order (38%) indicates a critical friction point. For these channels, where speed and focused attention are paramount, **if customers can't quickly find the value options, those opportunities are simply lost.**

Health and nutrition information presents a similar challenge, but with a different consumer mindset. Mobile order customers show the highest interest in healthier items (52%), and the information is almost universally available (96%). **Yet, despite this high interest and availability, only 10% actually change their minds to purchase a healthier option.**

The primary reasons cited for not choosing healthy items – "wasn't interested" or "in the mood for something else" – point to a perceived appeal gap. QSRs aren't just selling nutrition; they're selling satisfaction. The current healthy offerings might be failing to deliver on the "craveable" factor that often drives QSR visits. **This suggests a need for innovation in healthy options that prioritize taste and enjoyment, rather than just nutritional facts.**

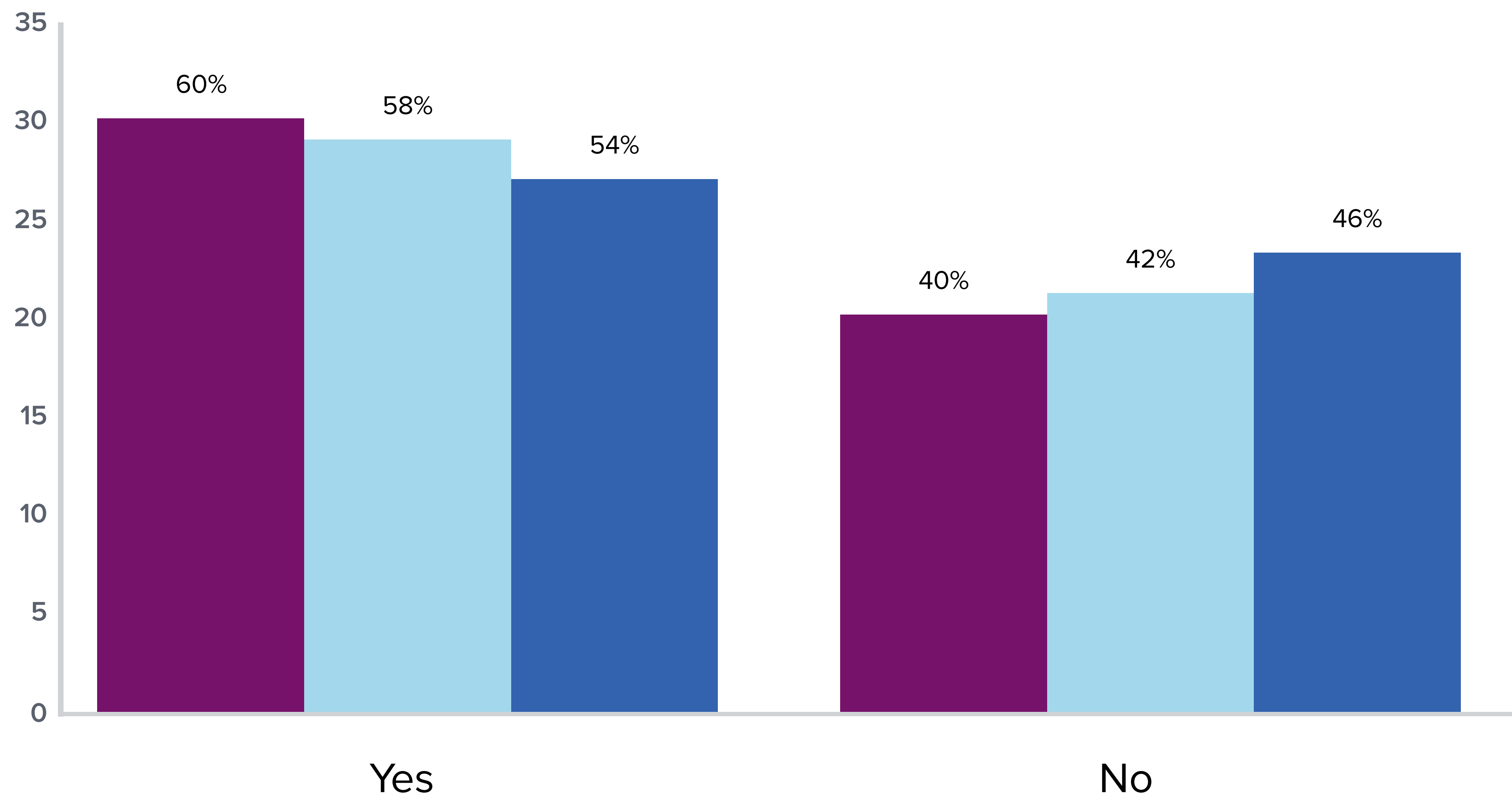
The dramatic difference in dessert purchase impact across channels (23% dine-in, 17% drive-thru vs. 2% mobile order) is highly insightful. Desserts are clearly impulse buys, heavily influenced by visual cues and suggestive selling in physical environments. Similarly, beverage sales show a decline in digital channels, with 32% purchase impact for dine-in dropping to 15% for mobile order. Customers using apps might already have drinks at home or simply don't perceive the added value of an incremental beverage when pre-ordering.



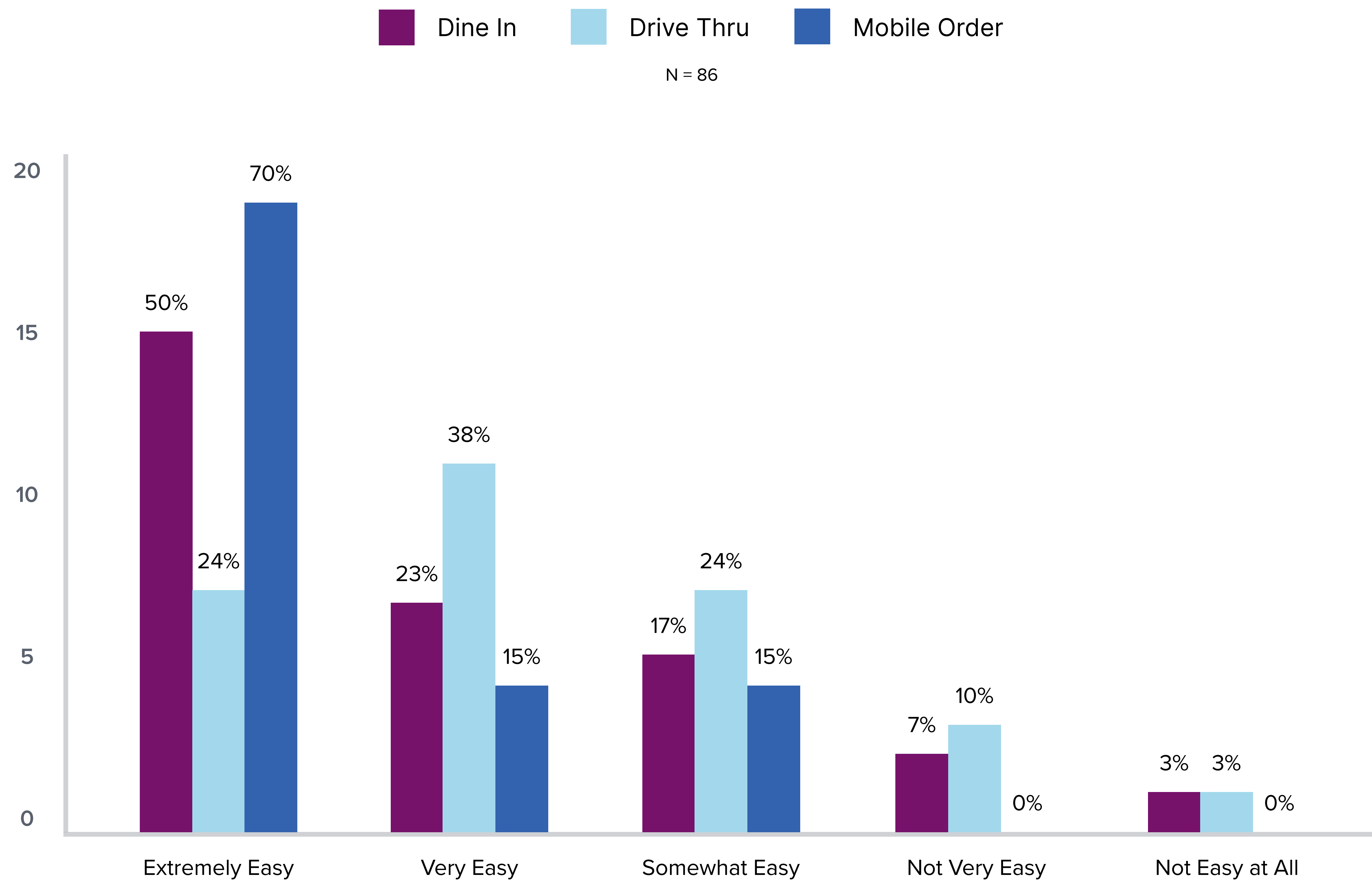
Is there a value menu?

Dine In Drive Thru Mobile Order

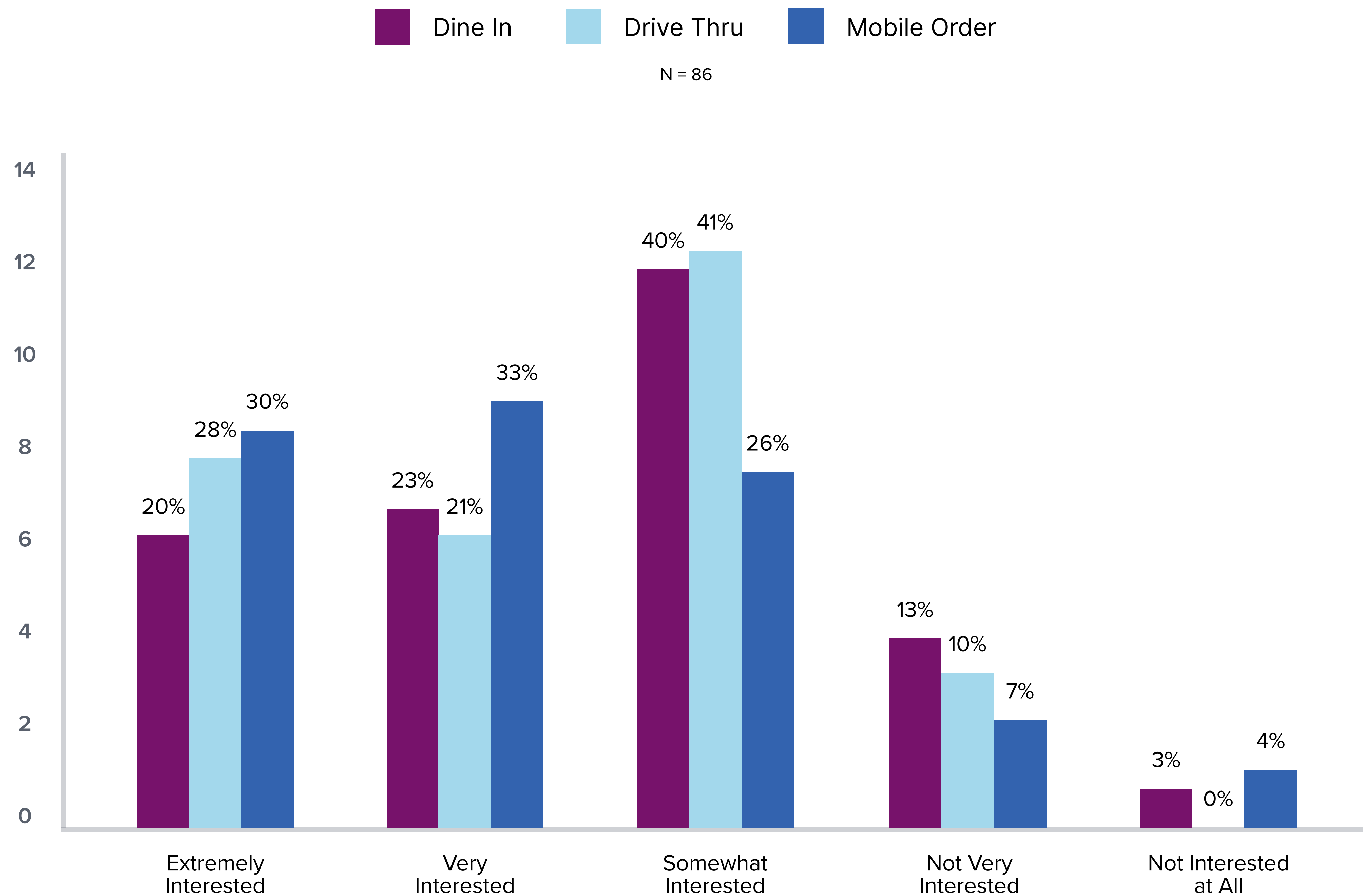
N = 150



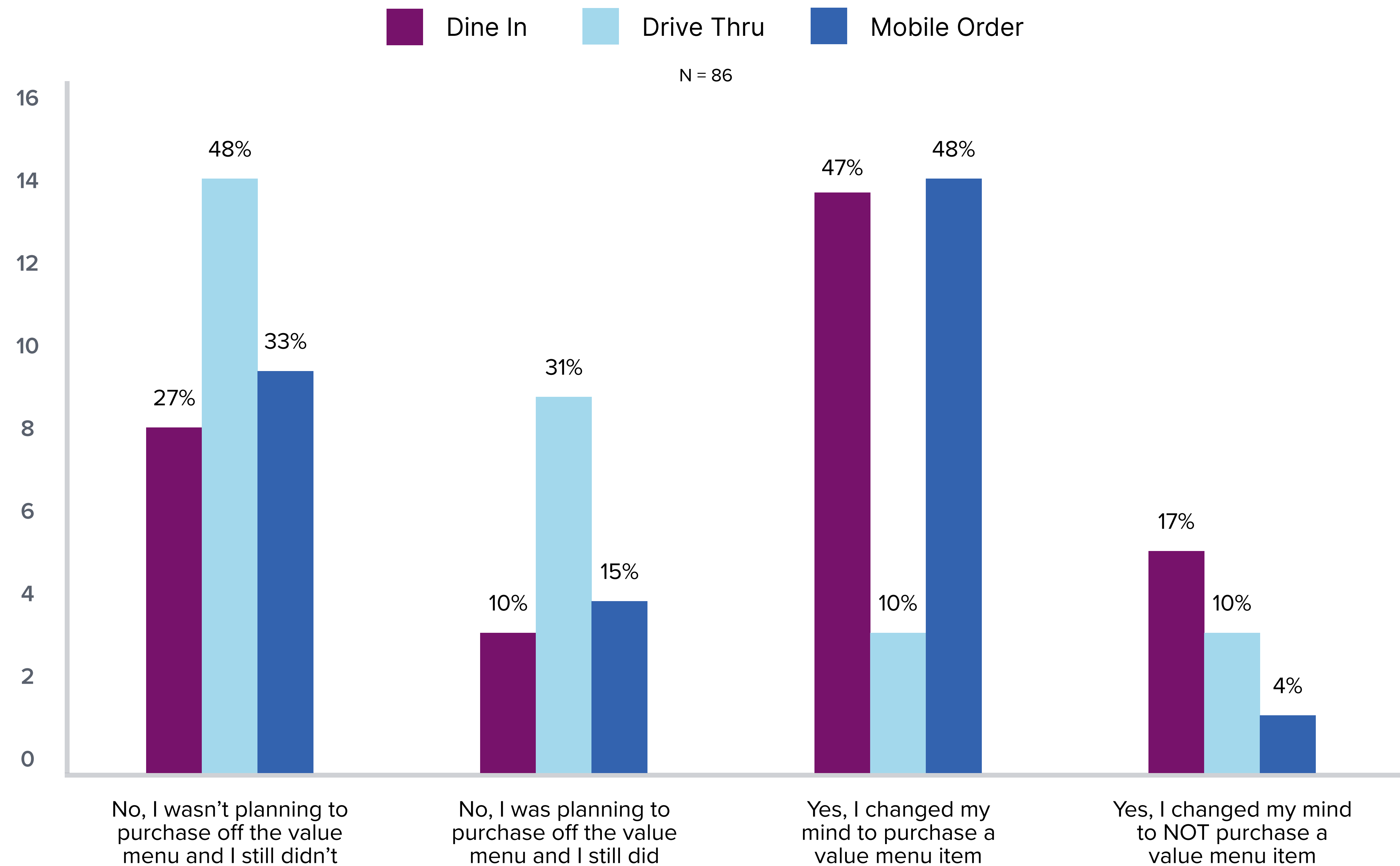
How easy was it for you to find value menu information?



How interested are you in buying an item off the value menu?



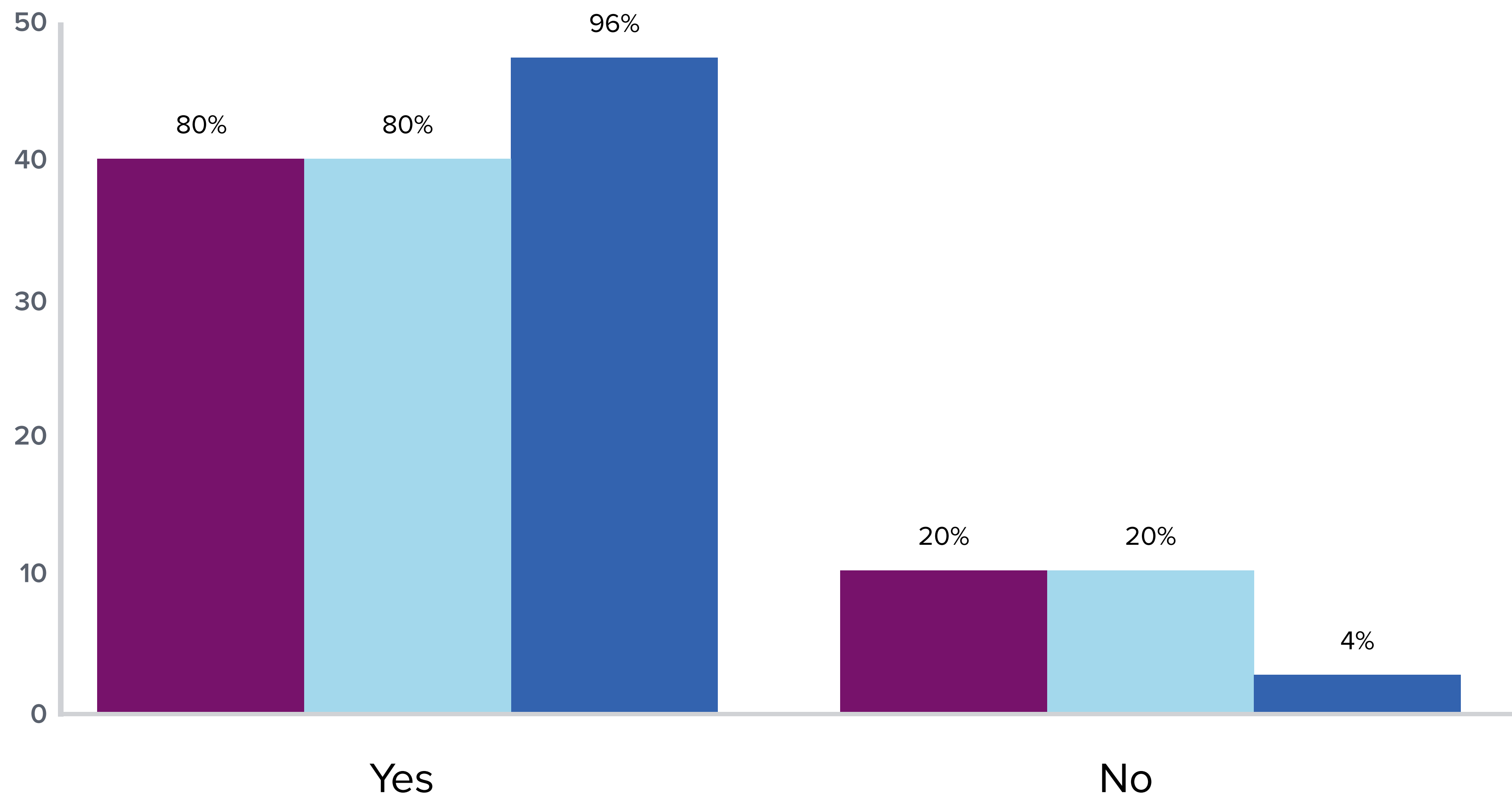
After reading the value menu, does this change/impact your upcoming purchase decision?



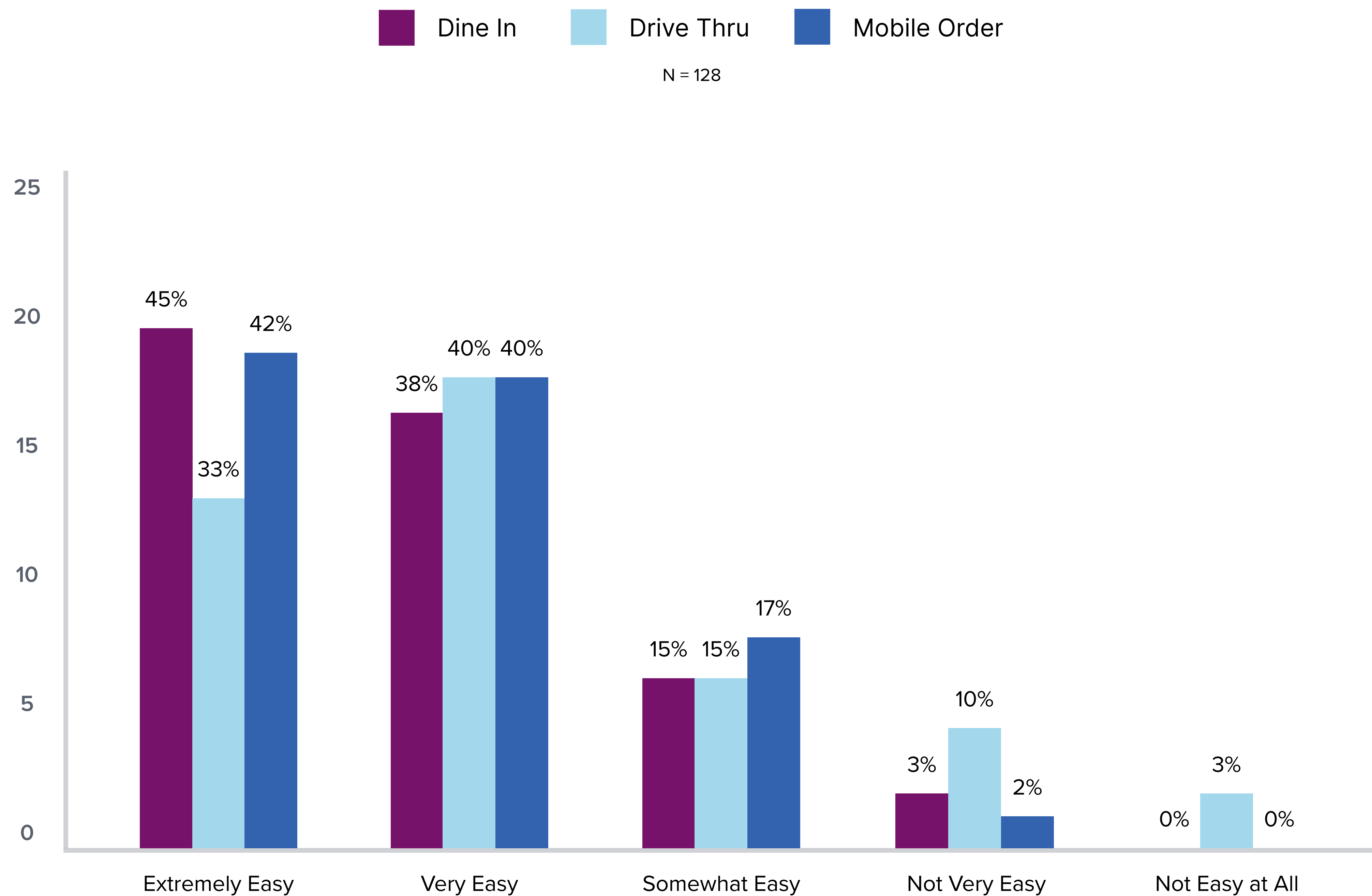
Is there health and nutrition information available?

Dine In Drive Thru Mobile Order

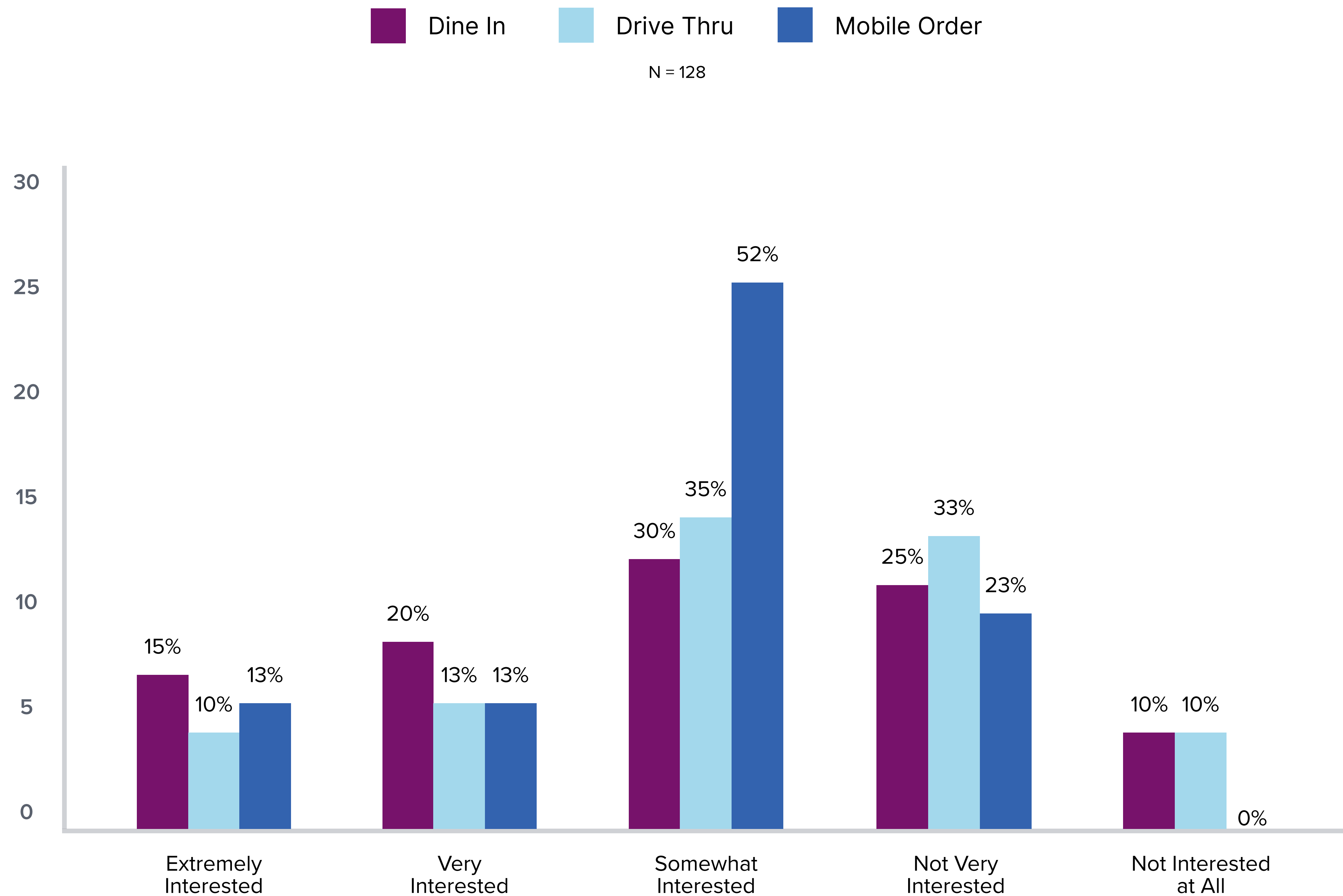
N = 150



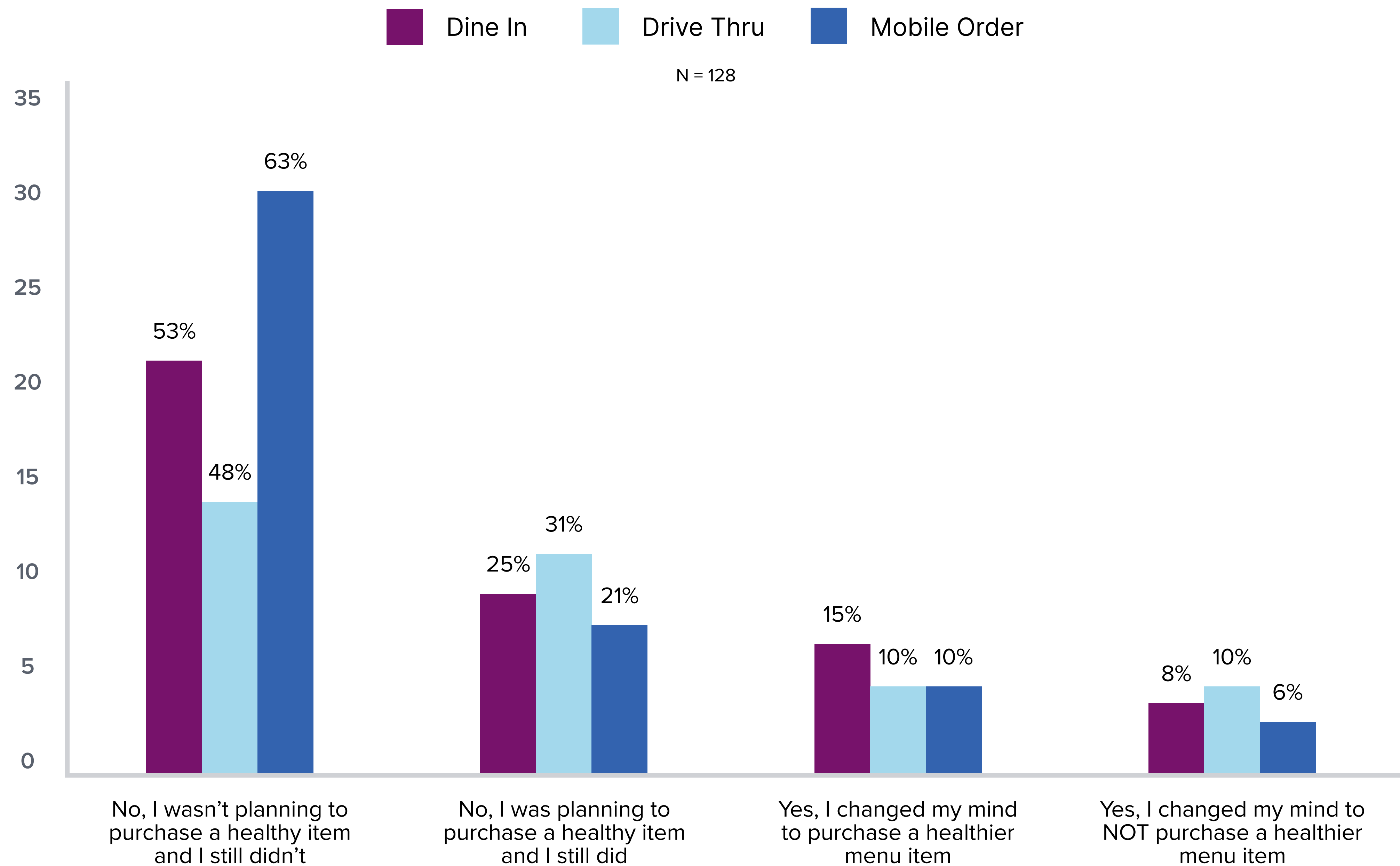
How easy was it for you to find health and nutrition information?



How interested are you in buying an item that's healthier on the menu?



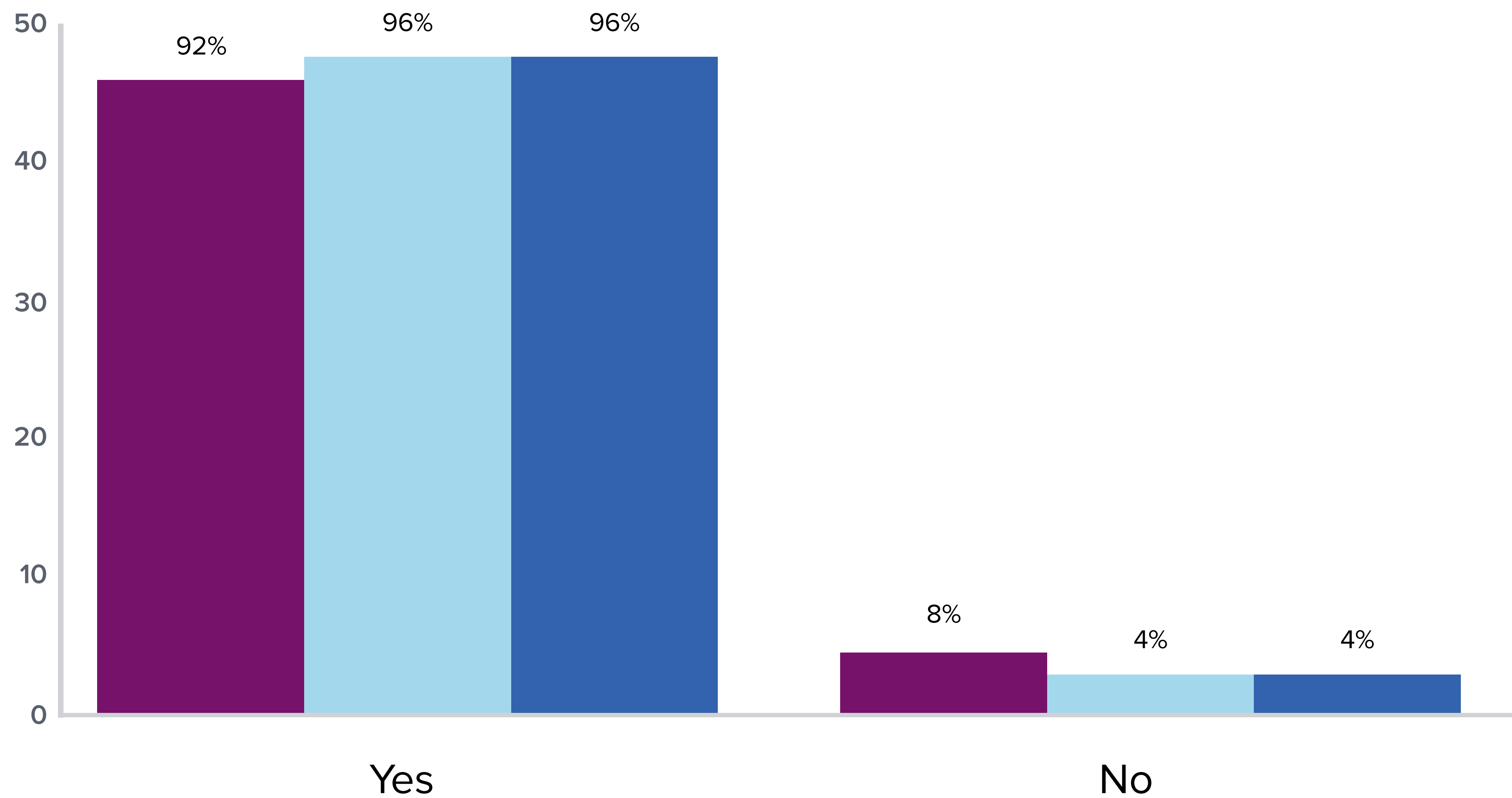
After reading the health and nutrition information, did this change/impact your purchase decision?



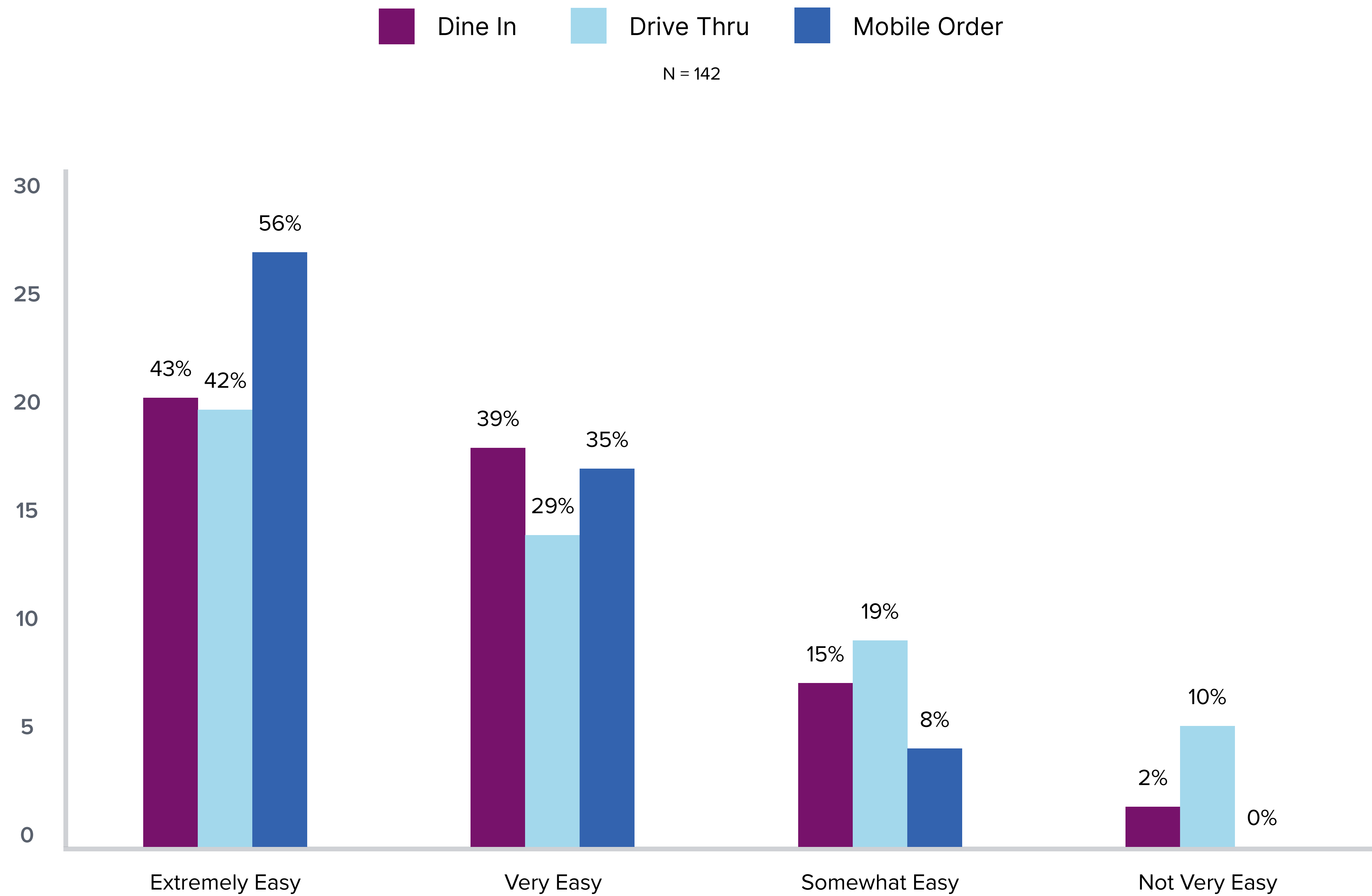
Is there dessert information available?

Dine In Drive Thru Mobile Order

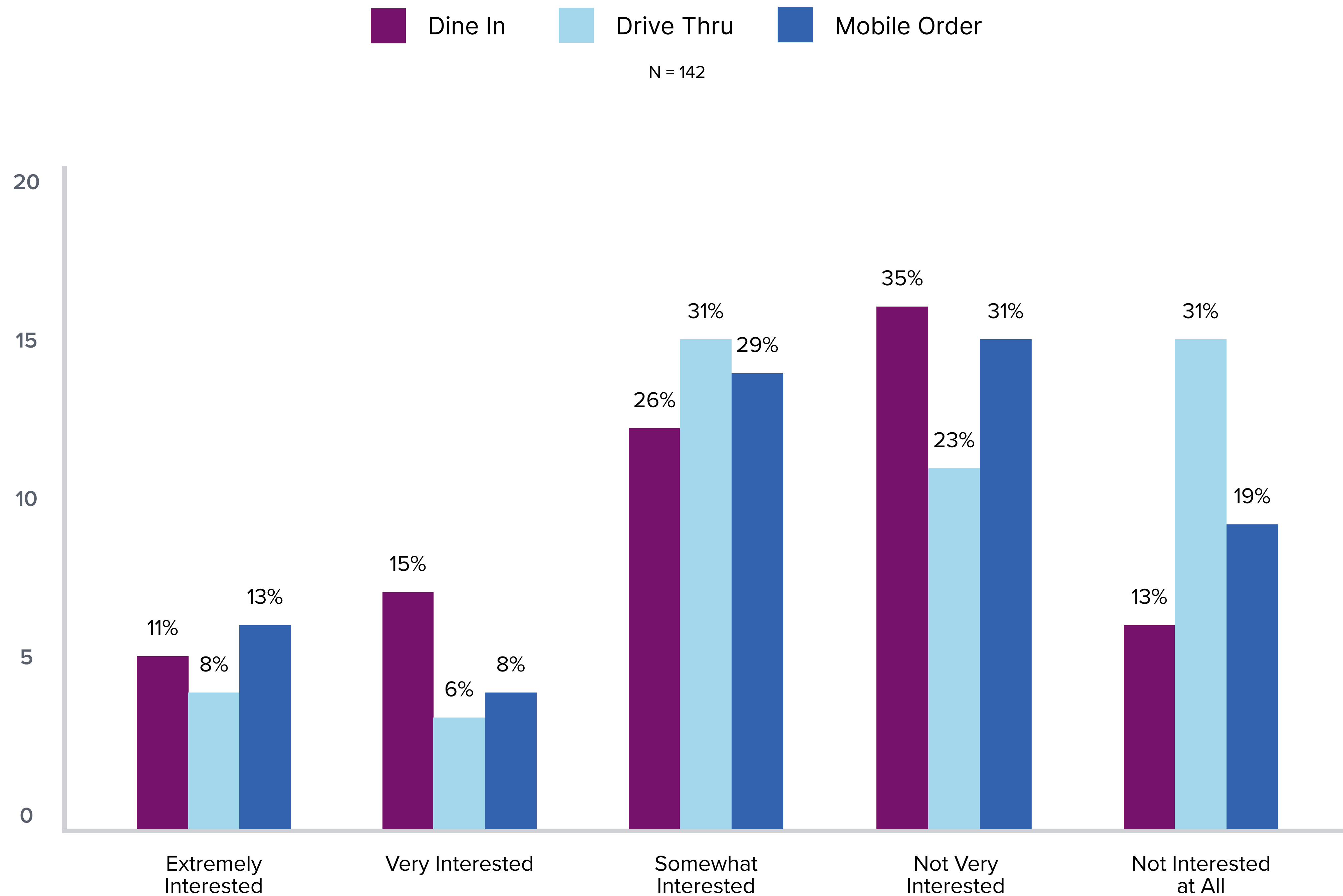
N = 150



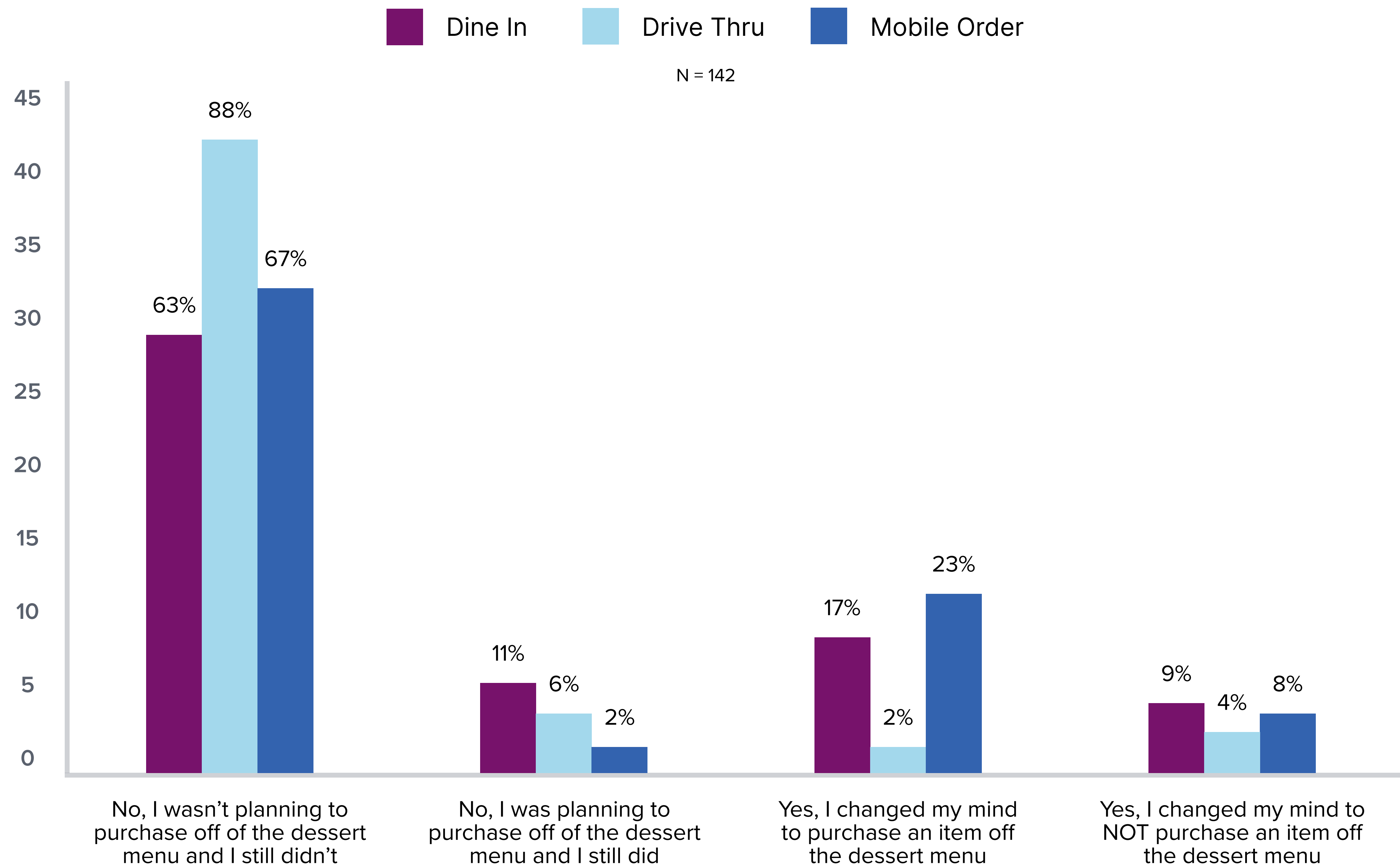
How easy was it for you to find dessert menu information?



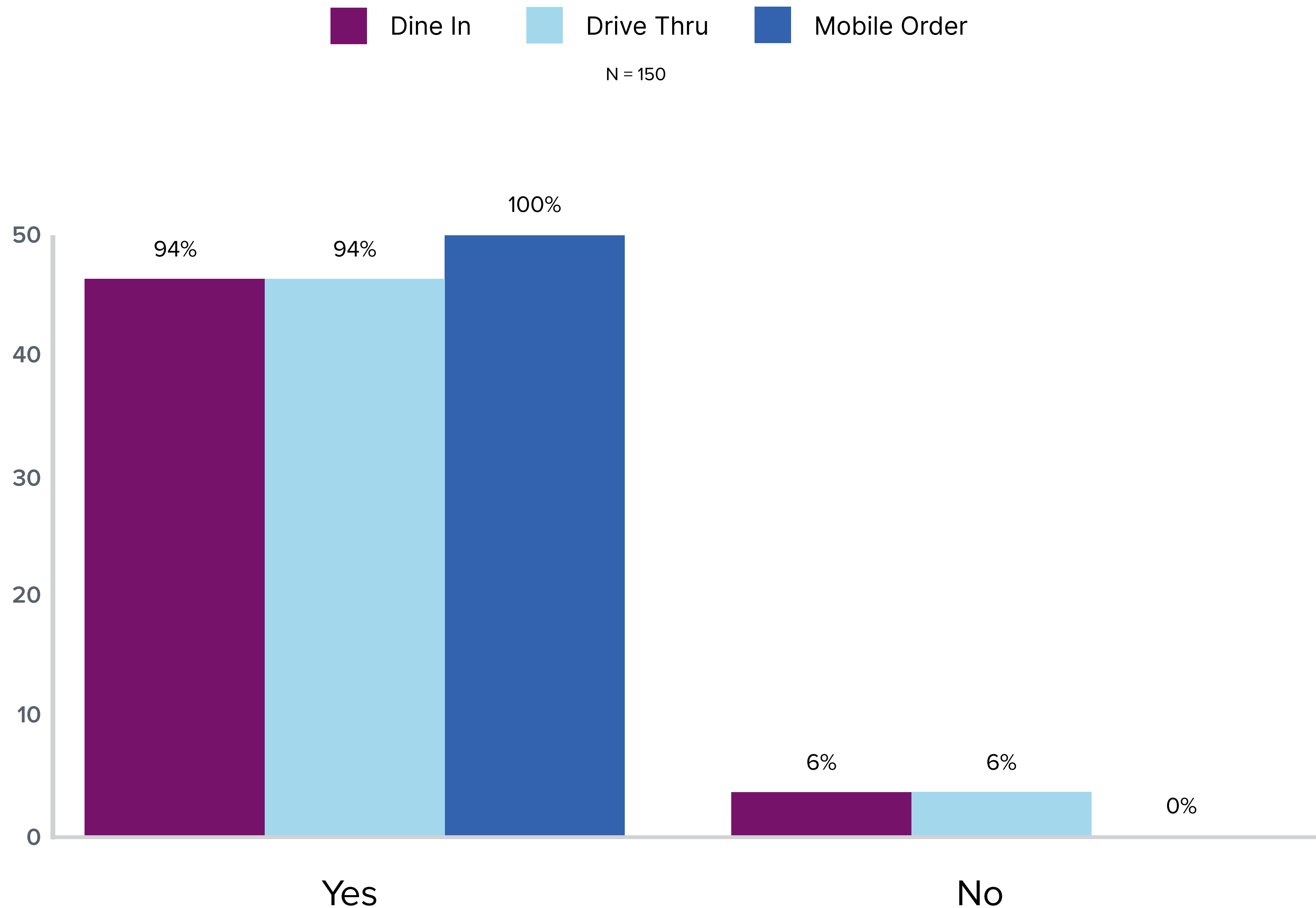
How interested are you in buying a dessert item on the menu?



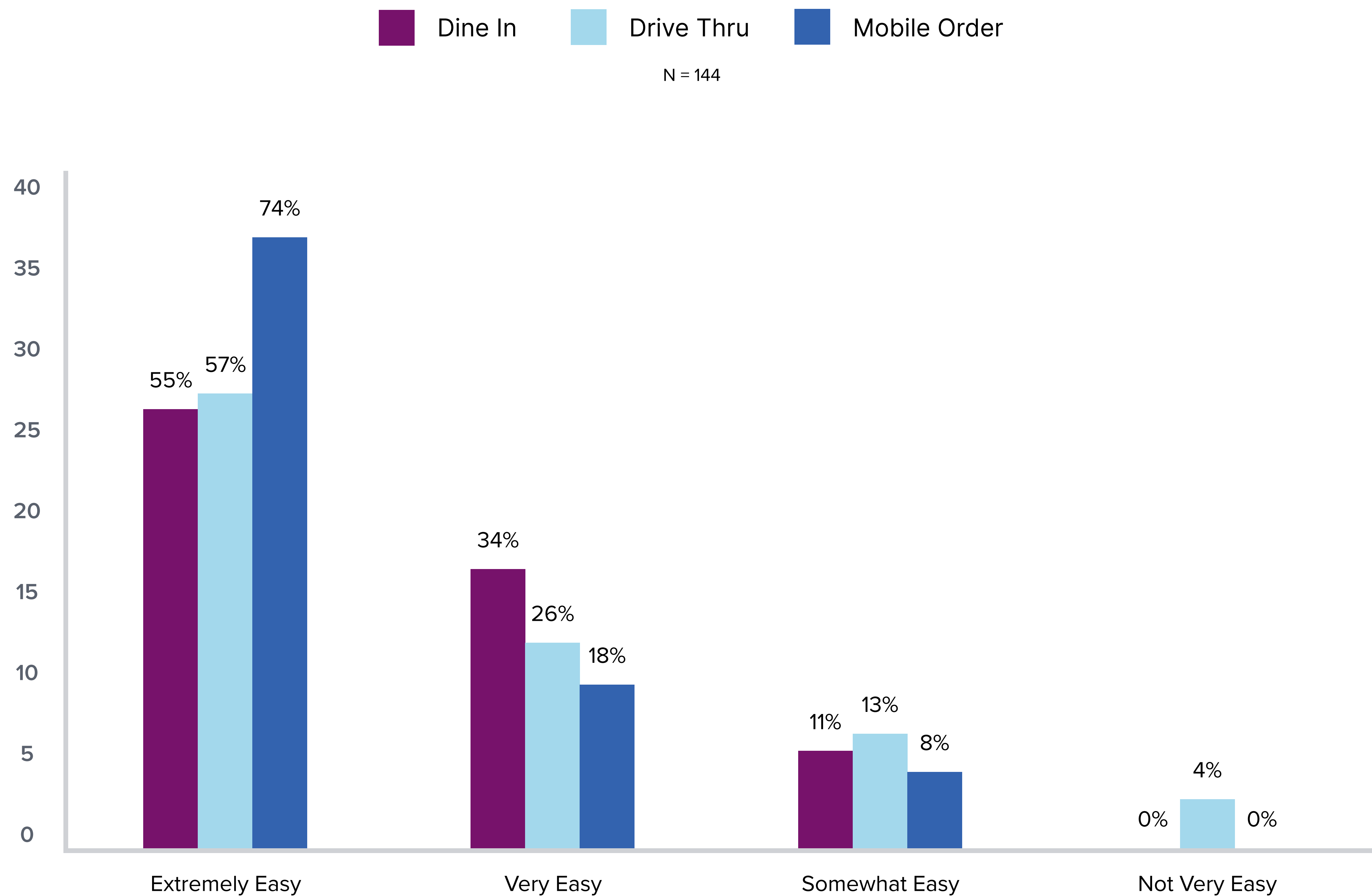
After reading the dessert menu, does this change/impact your upcoming purchase decision?



Are there soft drinks or alternative beverages information available?



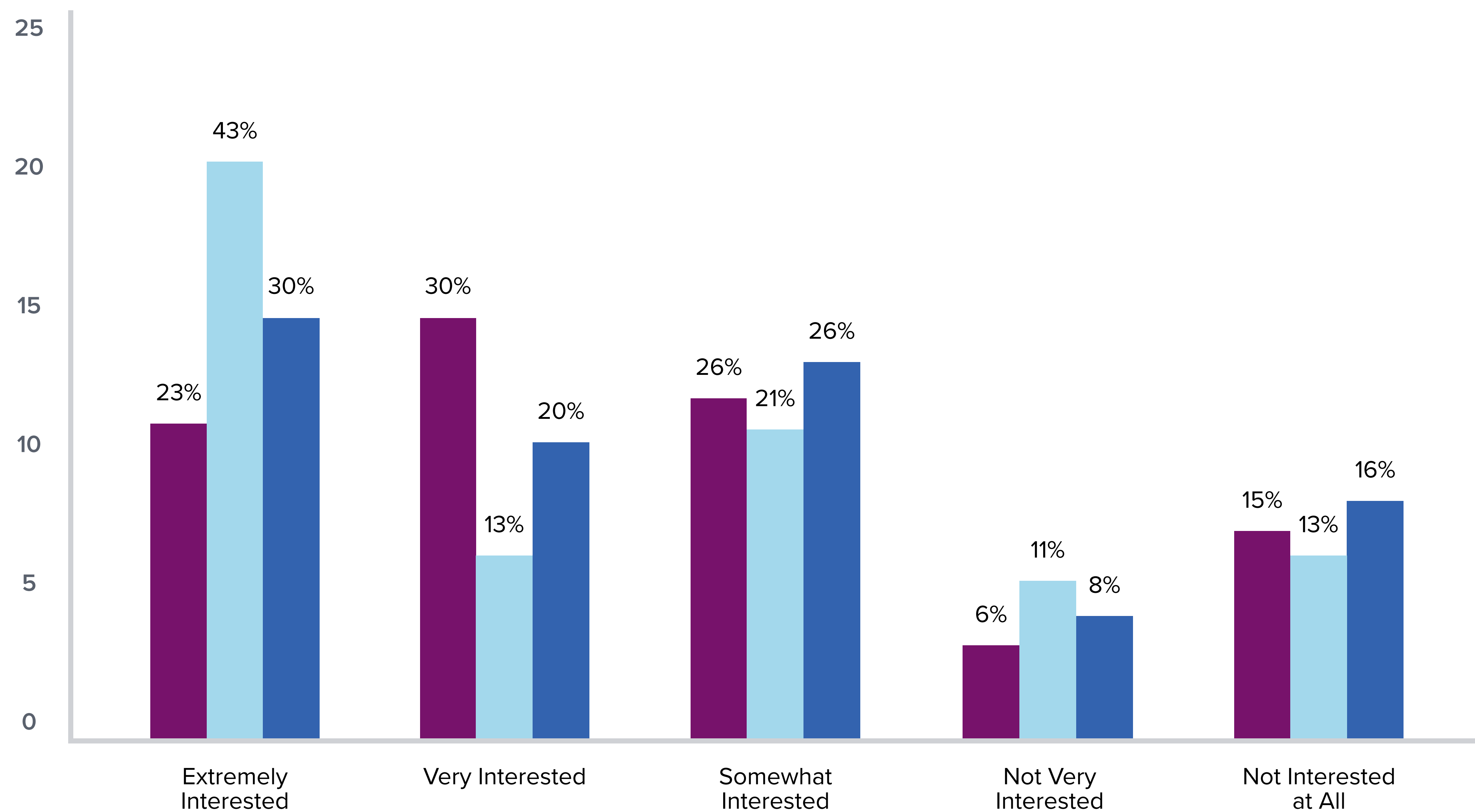
How easy was it for you to find drinks menu information?



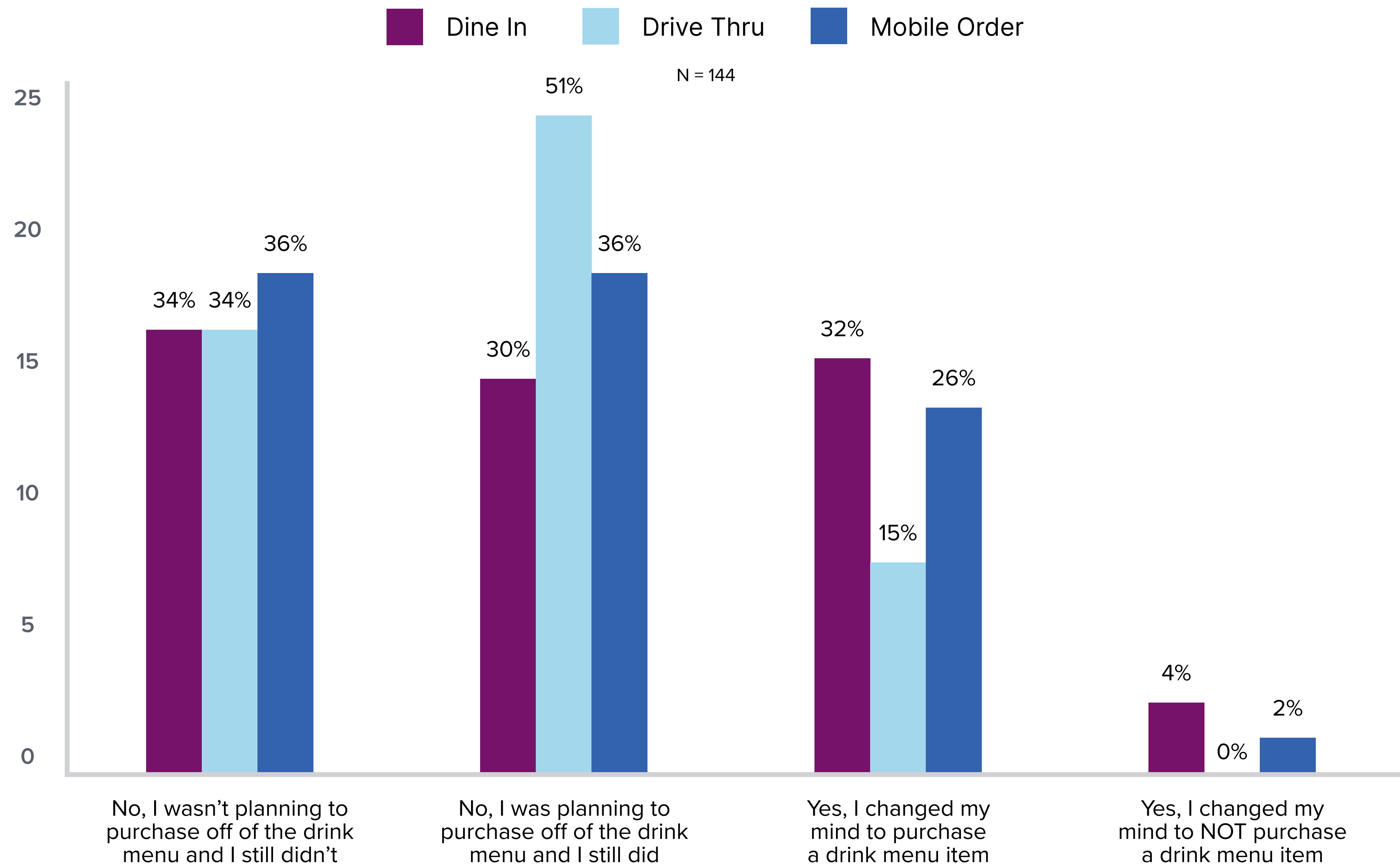
How interested are you in buying a drink on the menu?

Dine In Drive Thru Mobile Order

N = 144



After reading the drinks menu, does this change/impact your upcoming purchase decision?





**Order Speed,
Accuracy,
and Items**

Order Methods and Customer Profiling

While dine-in boasts impressive order accuracy at 98% and is the fastest (37% of orders in ≤ 2 minutes), this channel typically has simpler order flows and direct customer interaction to resolve issues. This operational efficiency sets a high baseline for what customers expect from QSR service.

The drive-thru and mobile order channels, both at 94% accuracy, show a slight but significant drop compared to dine-in. In high-volume, quick-turnaround environments like the drive-thru, even a 6% inaccuracy rate can lead to considerable customer frustration and operational inefficiencies, especially given the channel's inherent focus on speed.

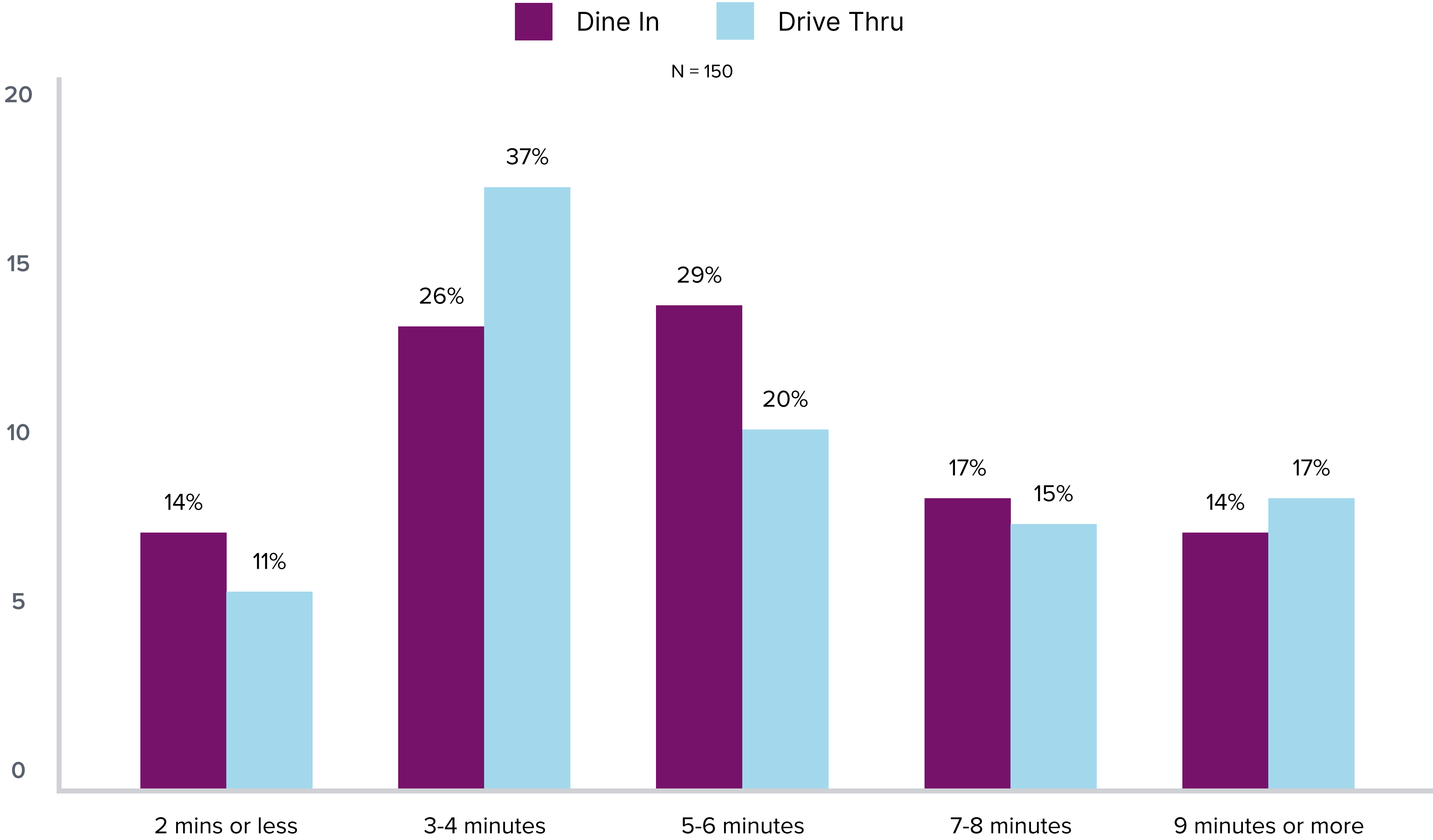
Similarly, for mobile orders, where the expectation is seamless perfection, inaccuracies can deeply erode trust in the digital platform. **This suggests that QSRs must invest relentlessly in refining their order-taking and fulfillment processes for these channels**, perhaps through enhanced technology (like AI order confirmation at drive-thru) and rigorous staff training focused on order verification before handover.

The spending patterns are particularly telling for strategic planning. The **drive-thru** stands out with the highest average spend (\$10.16) and a remarkably high "most common spend" of \$26.99. This wide gap strongly indicates that drive-thru is a dominant channel for larger, multi-person orders, likely families or groups. This isn't just a quick individual meal stop; it's often a meal solution for several people. **QSRs should tailor their drive-thru menus and promotions specifically to these larger orders, emphasizing family bundles or group meal deals that are easy to order quickly.**

Conversely, **mobile order** has the lowest average spend (\$8.97) and the lowest "most common spend" of \$7.42. This strongly suggests that mobile ordering is primarily for individual, pre-planned, and convenient meals. The consumer here is likely looking for a quick, personal solution.

QSRs should segment their value messaging to resonate with these channel-specific drivers. For example, promoting "family value" in drive-thru, "quick smart choice" in mobile, and "great deal for a satisfying meal" in dine-in can optimize appeal and conversion.

Record the time you entered the line to place your order, and the time you received your order. How long did it take?



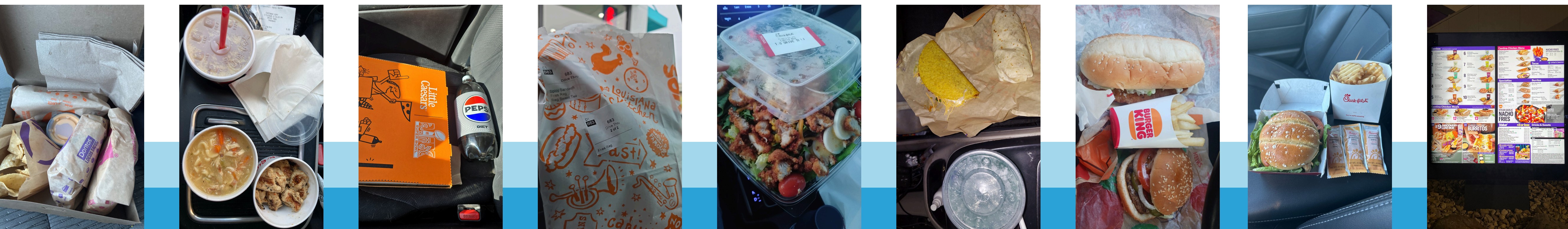
What did you order? (Dine In)

fries sandwich
deluxe
potatoes cheese
taco
meal chicken bacon
spicy
salad double nuggets



What did you order? (Drive Thru)

meal salad spicy
medium fries
large nuggets
chicken double
grilled
cheeseburger sandwich



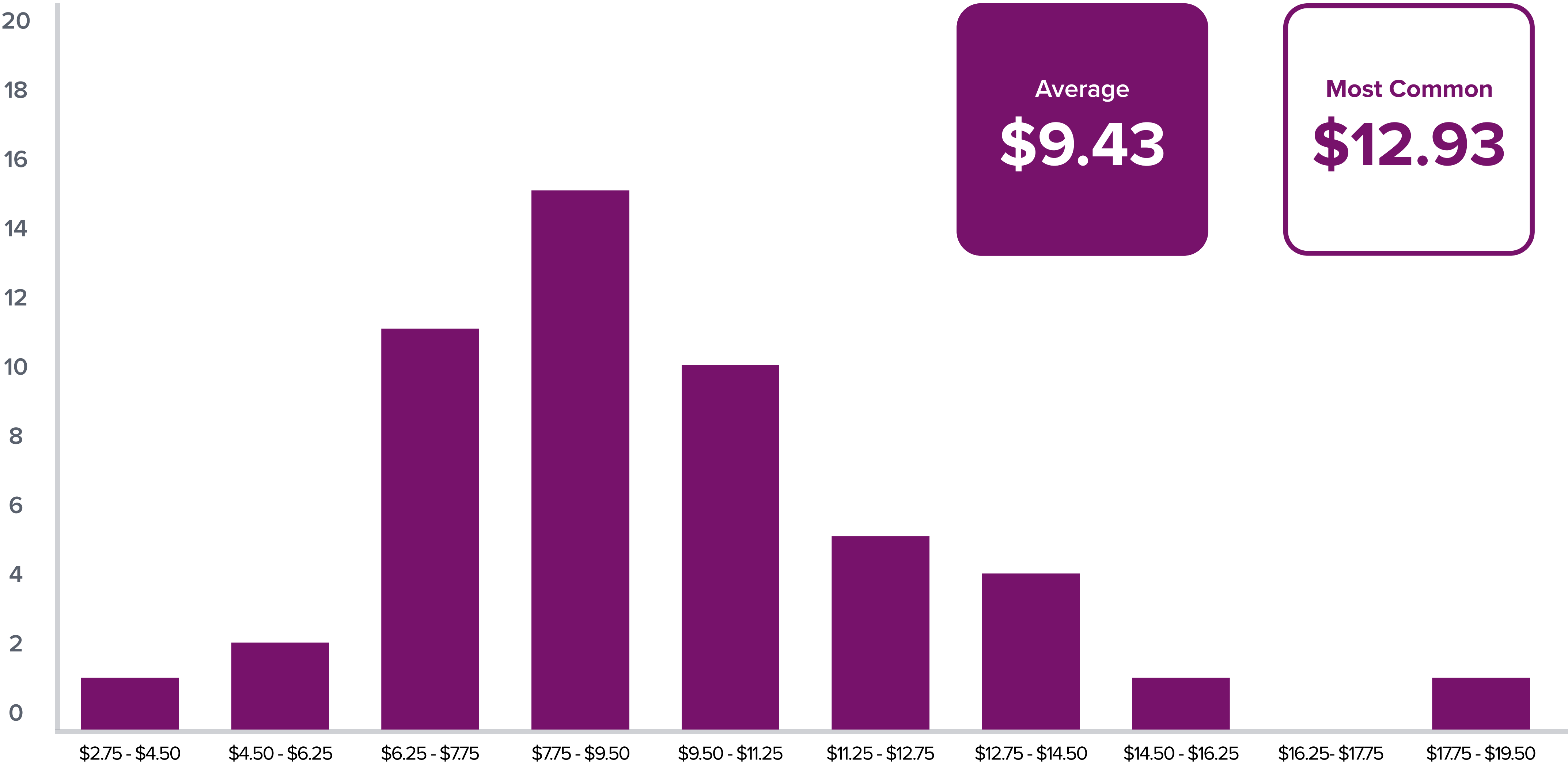
What did you order? (Mobile Order)

meal burrito fries
bread chicken double
chips pizza
sandwich mcdouble burrito
cheese large nuggets



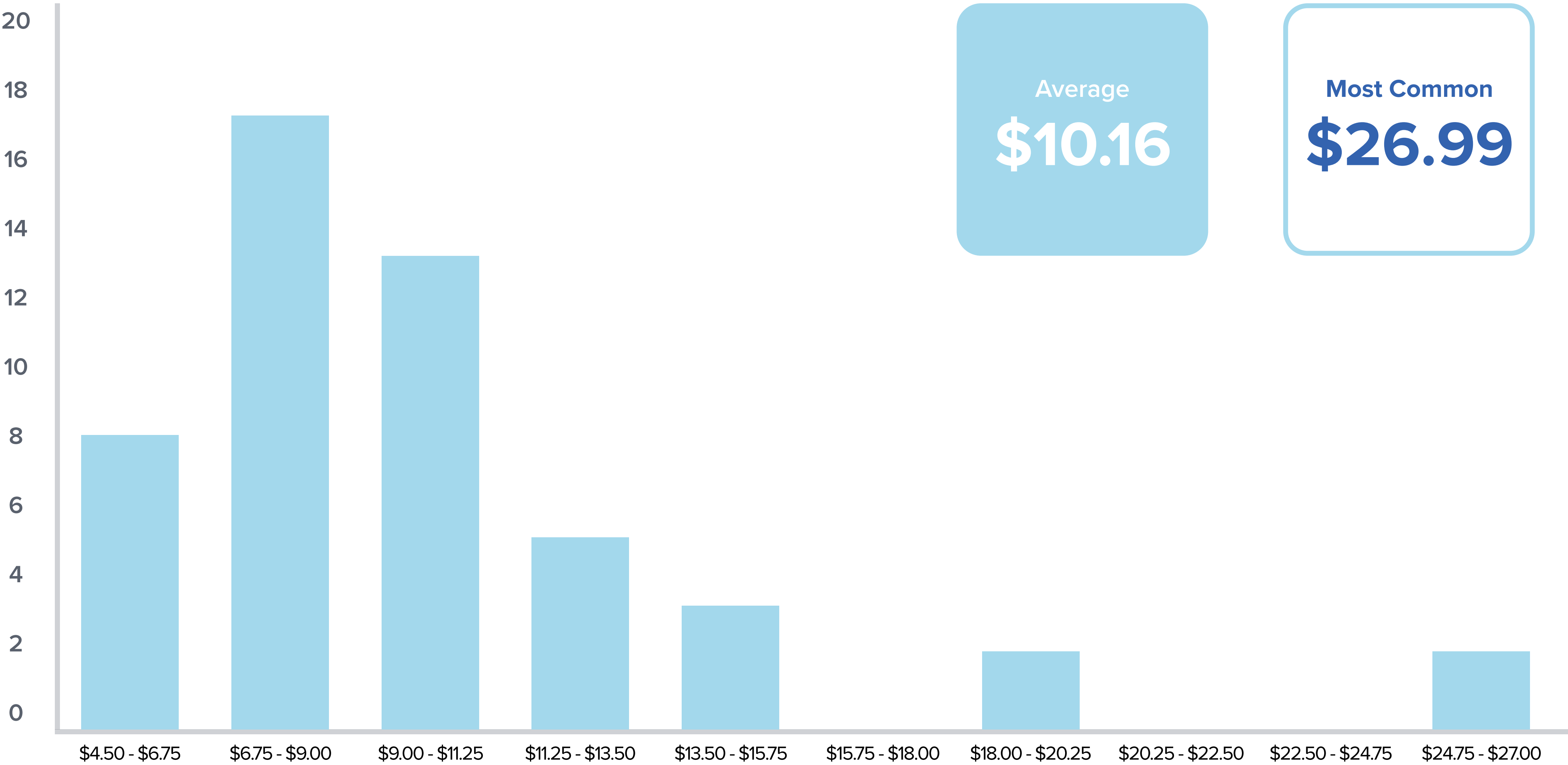
How much did you spend on this **dine in** purchase?

Shoppers were given \$8 to spend from Field Agent. They could spend more of their own money if they'd like.



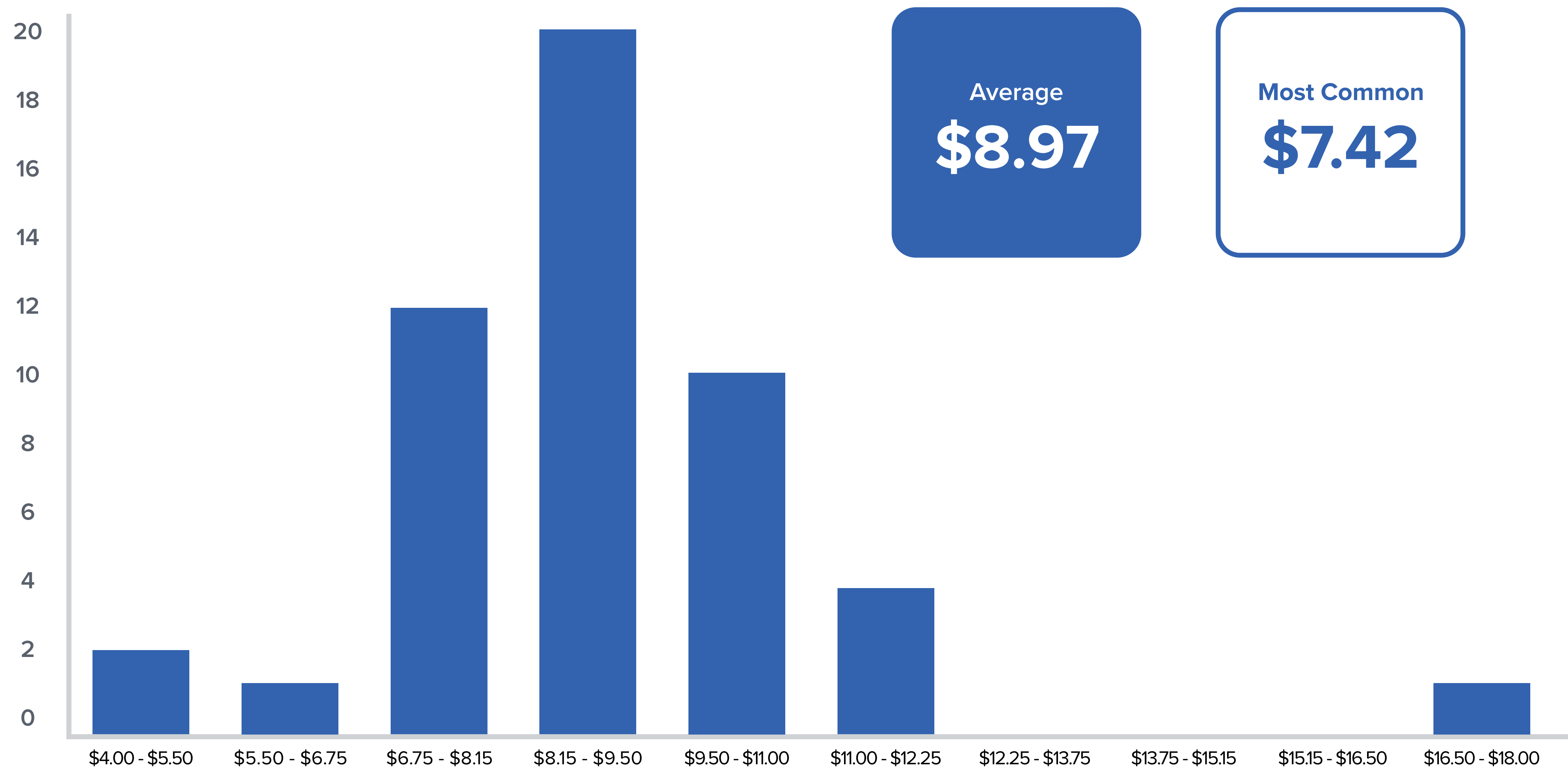
How much did you spend on this drive thru purchase?

Shoppers were given \$8 to spend from Field Agent. They could spend more of their own money if they'd like.



How much did you spend on this mobile order purchase?

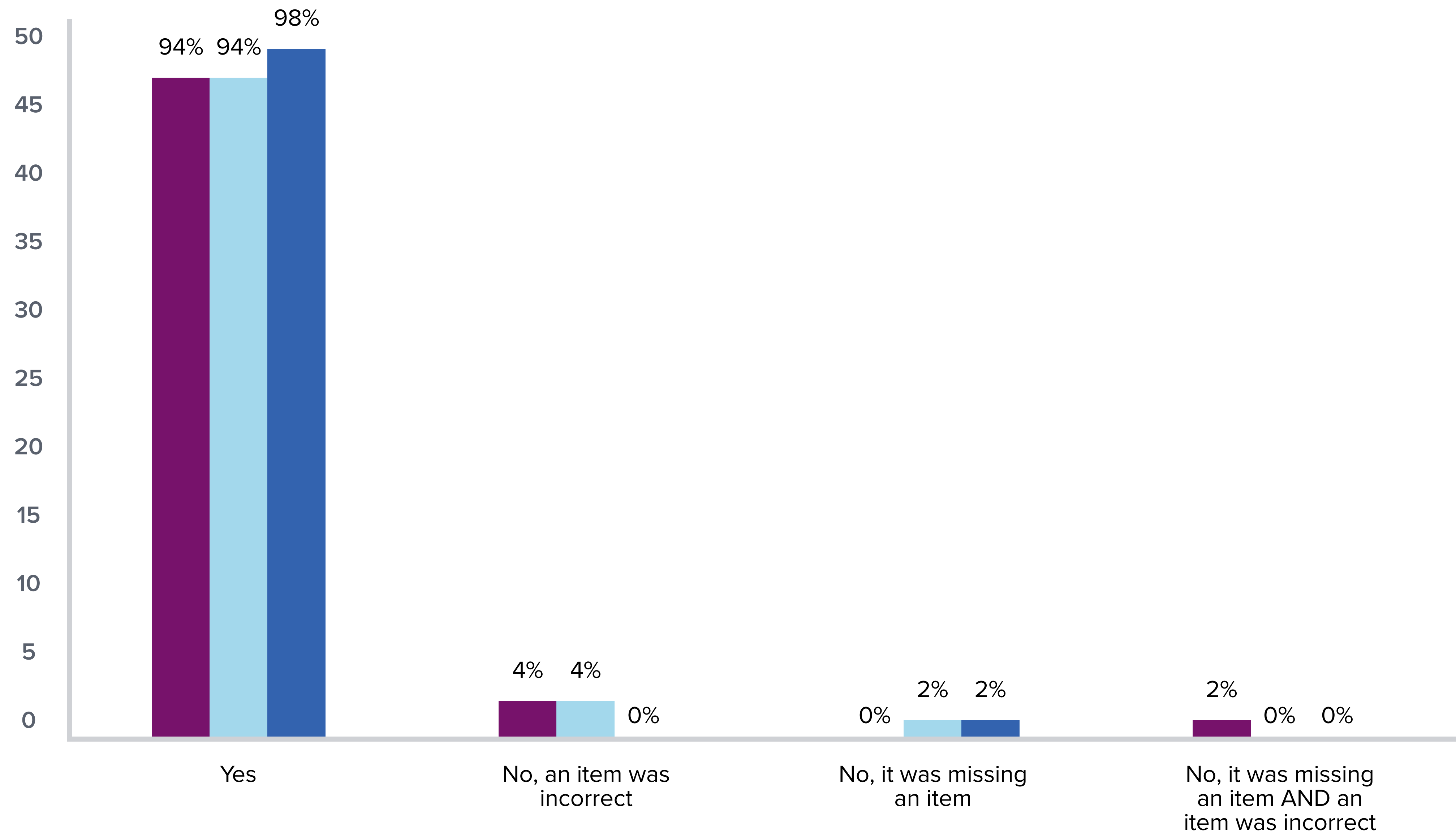
Shoppers were given \$8 to spend from Field Agent. They could spend more of their own money if they'd like.



Was your order accurate?

Dine In Drive Thru Mobile Order

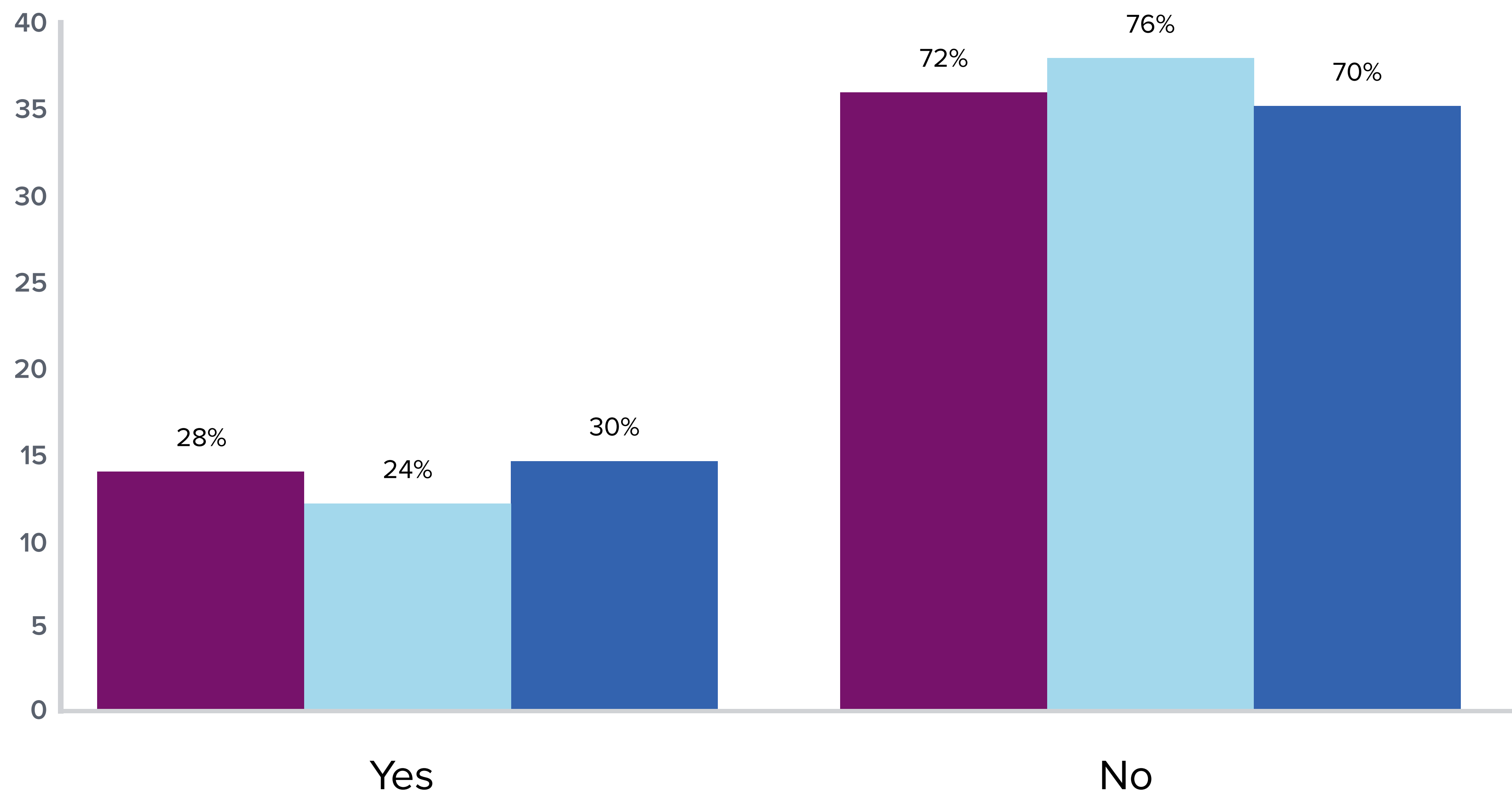
N = 150

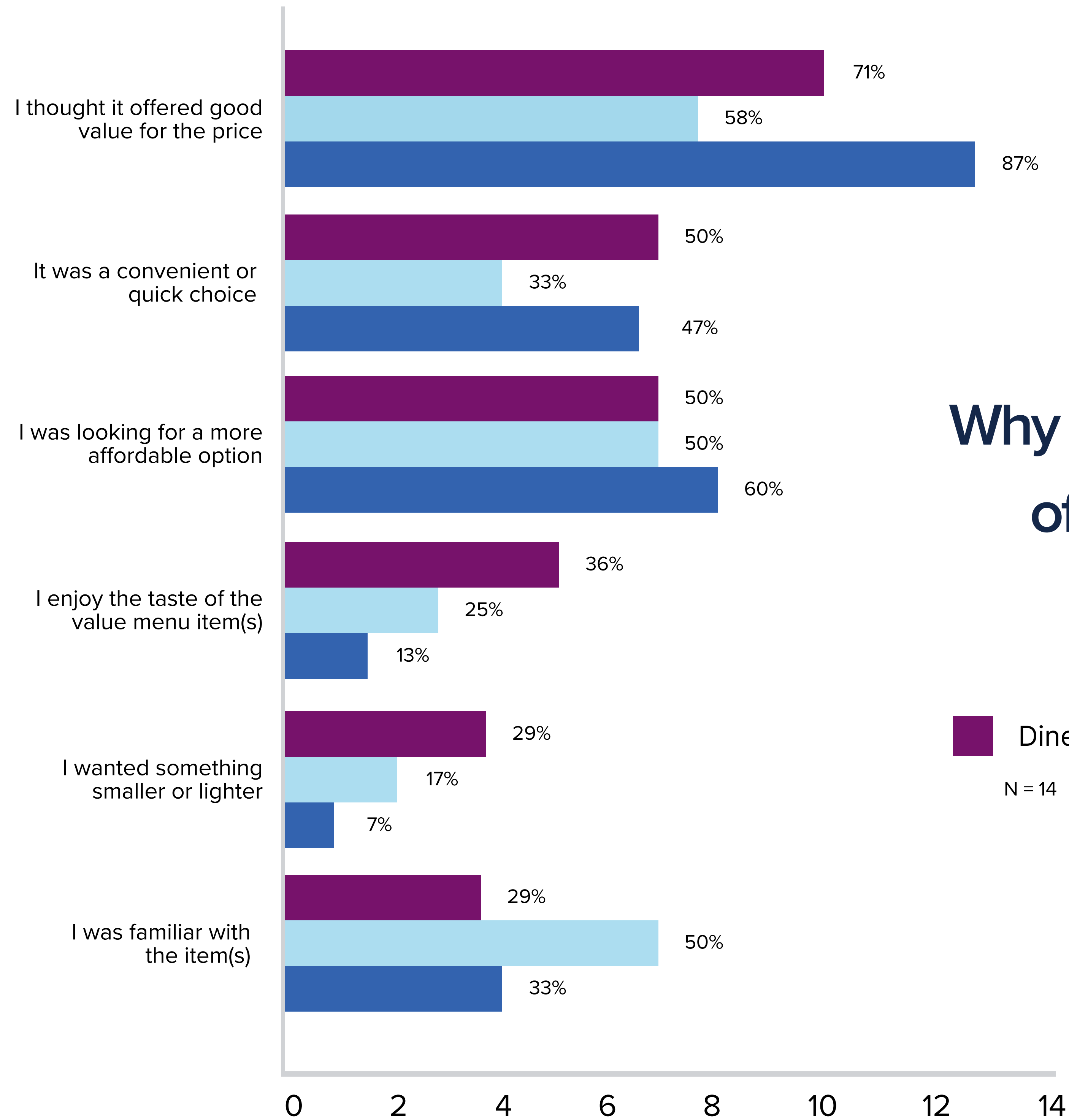


Did you order something off of the value menu?

Dine In Drive Thru Mobile Order

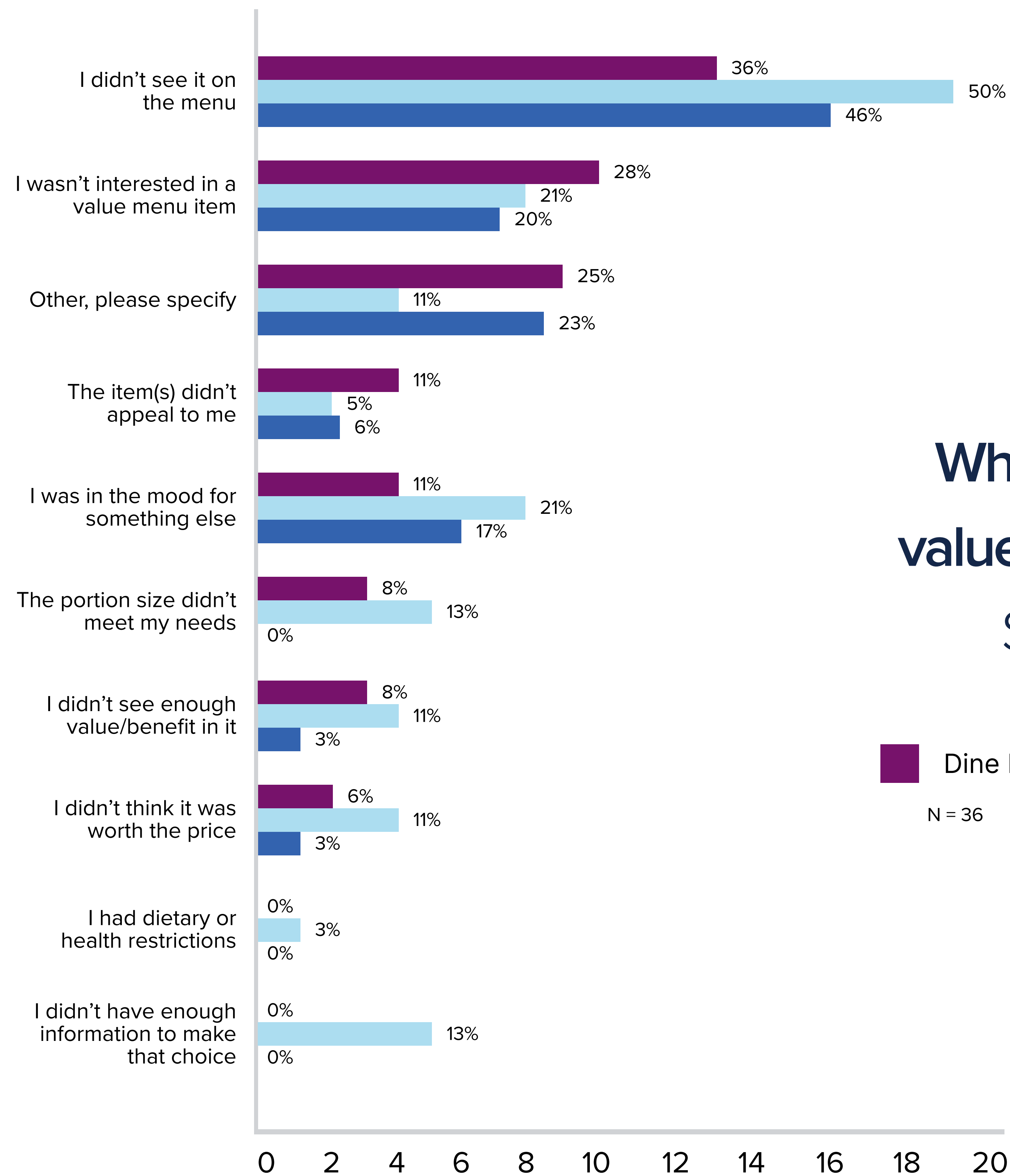
N = 150








Why did you order something off of the value menu?
Select all that apply.

Dine In **Drive Thru** **Mobile Order**
N = 14 N = 12 N = 15



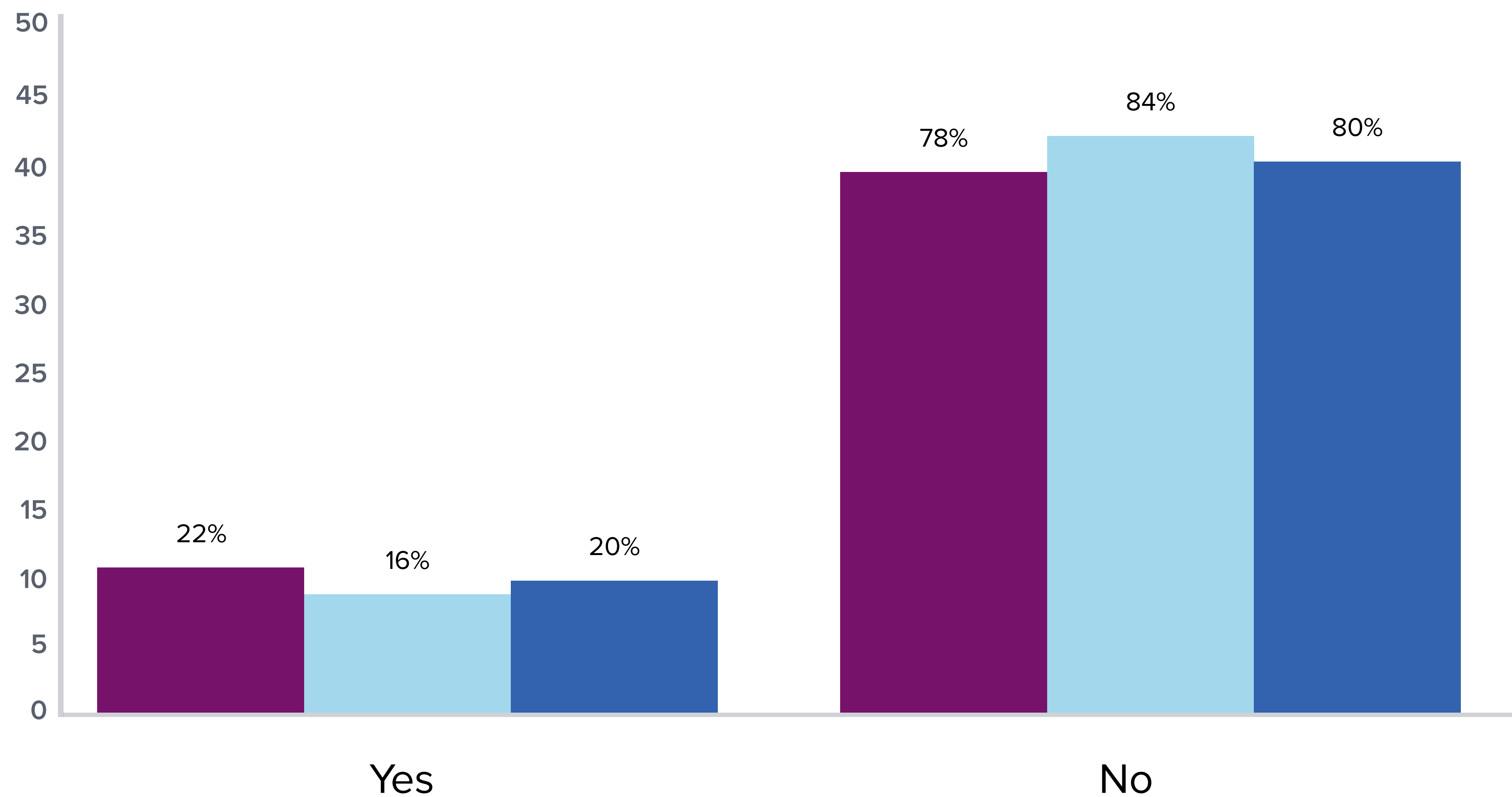
Why didn't you choose a value item off of the menu?
Select all that apply.

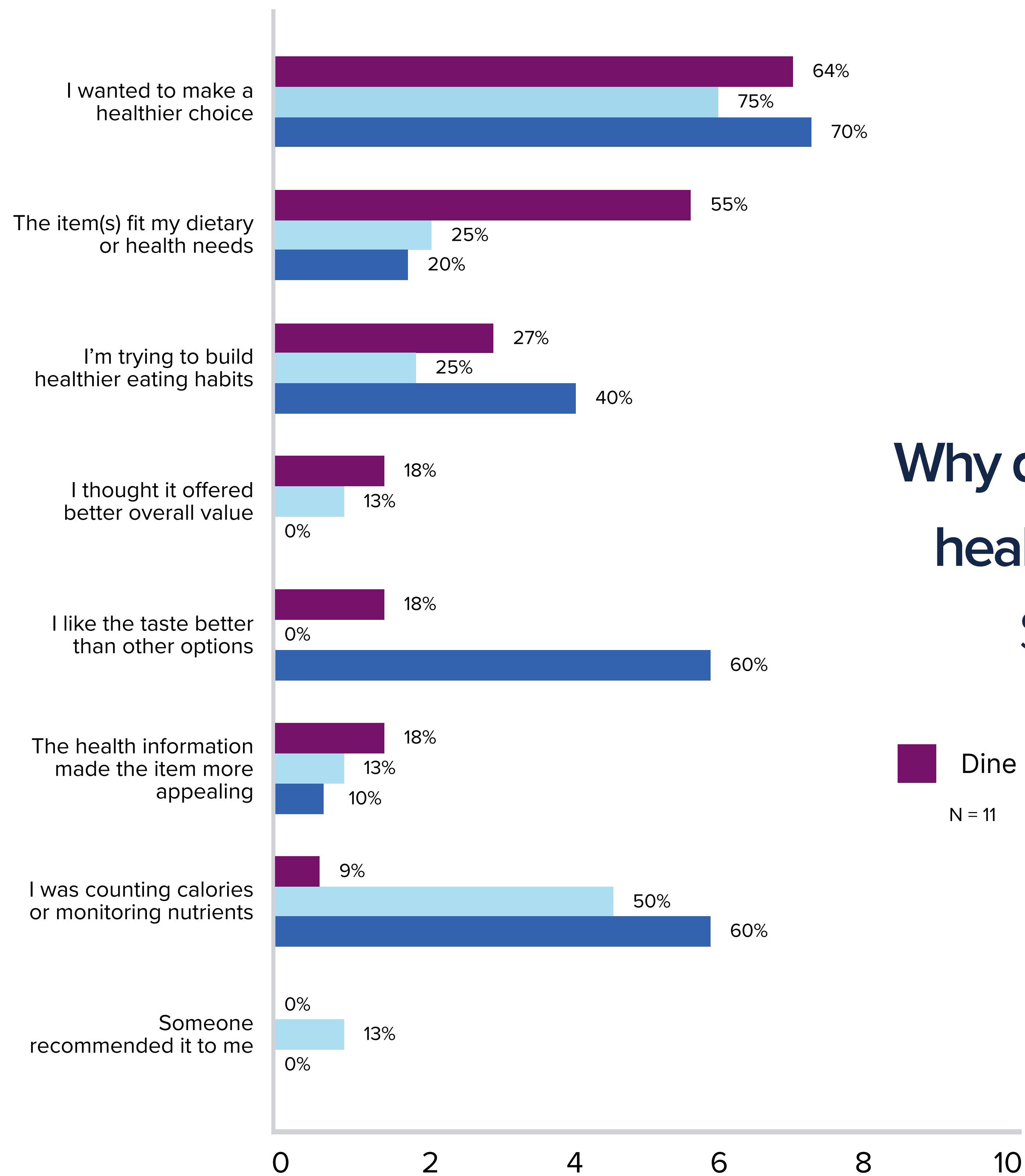
 Dine In N = 36  Drive Thru N = 38  Mobile Order N = 35

Did you order something based on the health information available?




Dine In Drive Thru Mobile Order

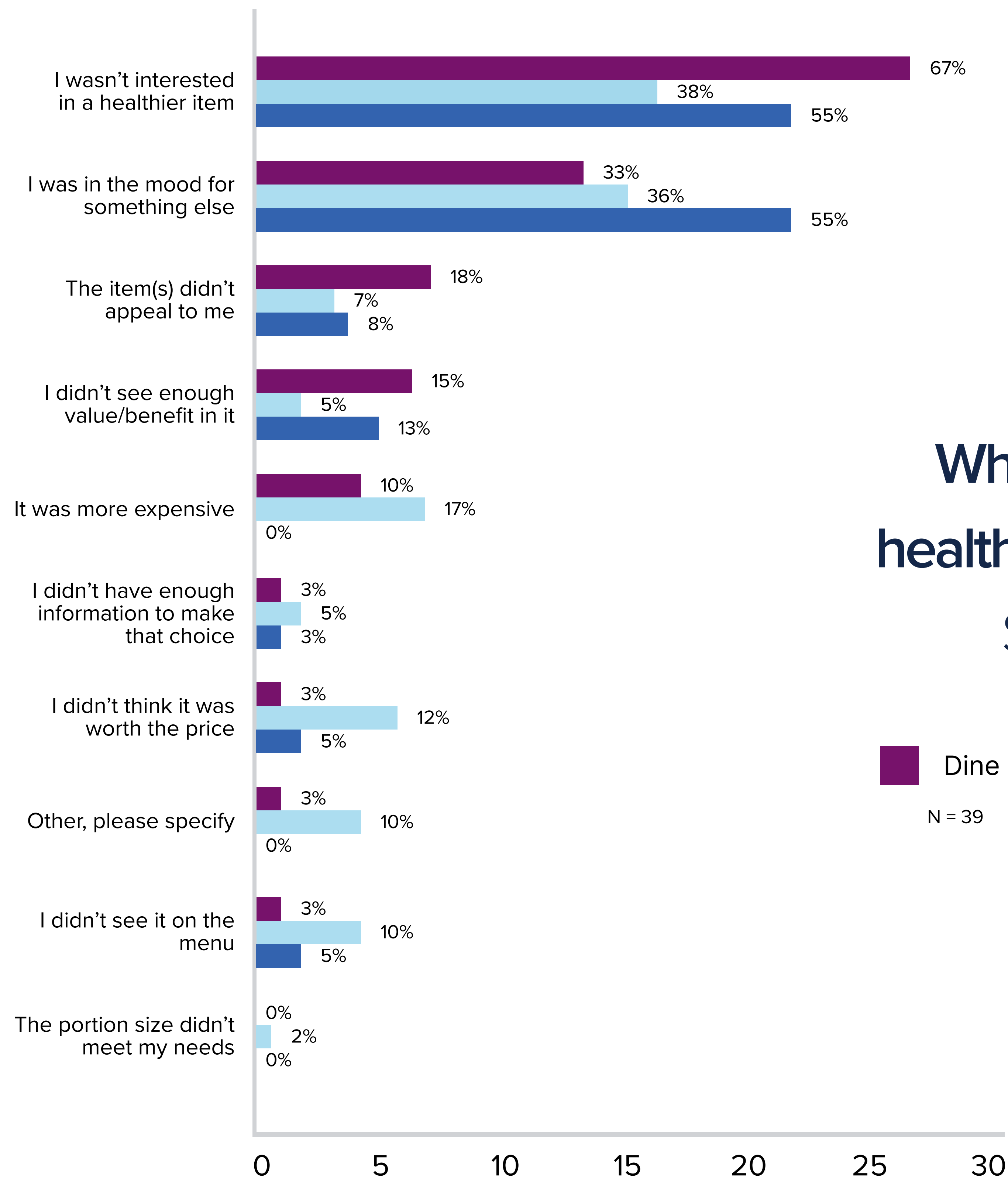
N = 150




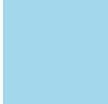



Why did you order something healthier off of the menu?
Select all that apply.

 Dine In N = 11  Drive Thru N = 8  Mobile Order N = 10



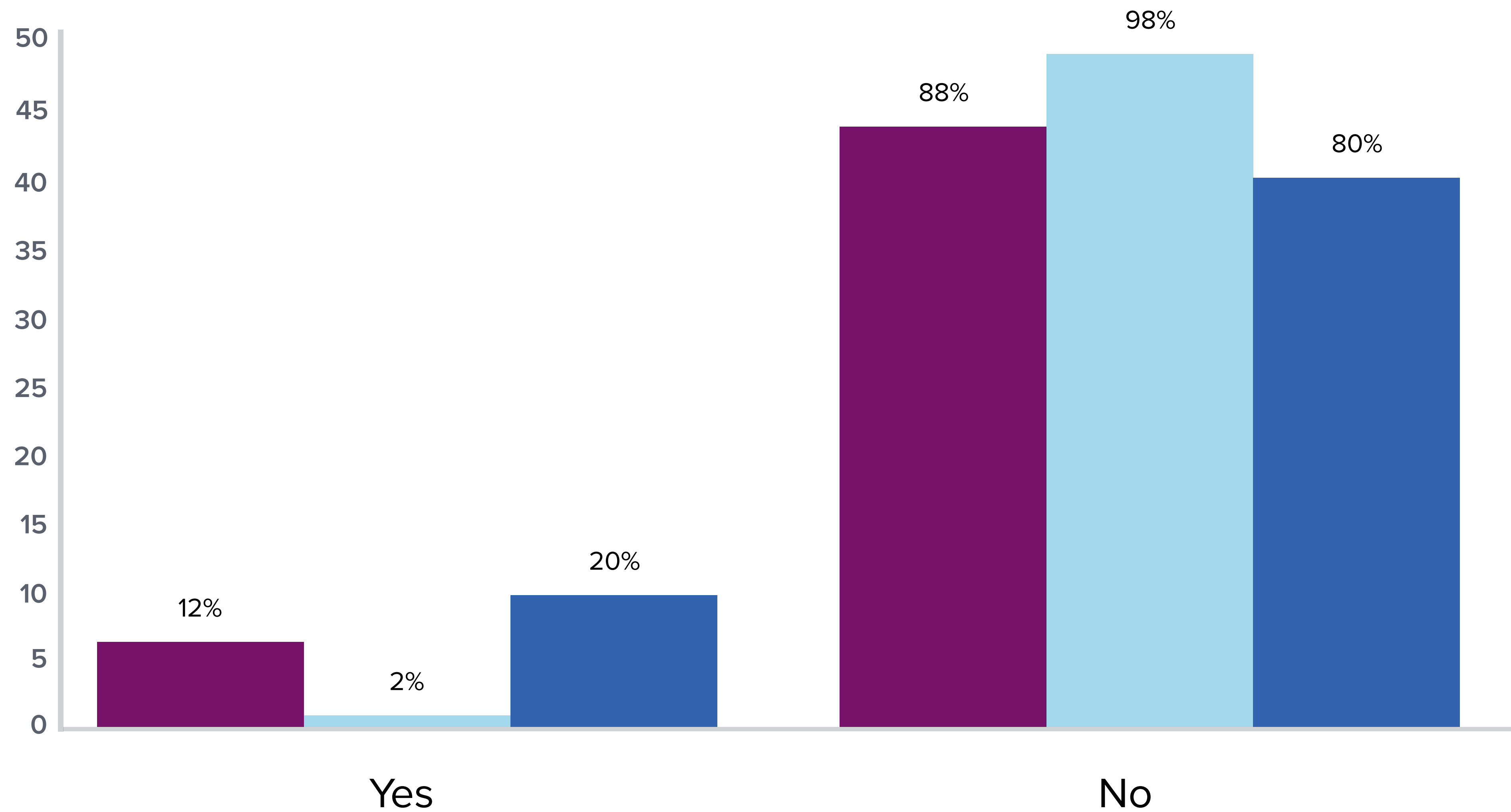
Why didn't you choose a healthy item off of the menu?
Select all that apply.

 Dine In N = 39  Drive Thru N = 42  Mobile Order N = 40

Did you order a dessert off the menu?

Dine In Drive Thru Mobile Order

N = 150

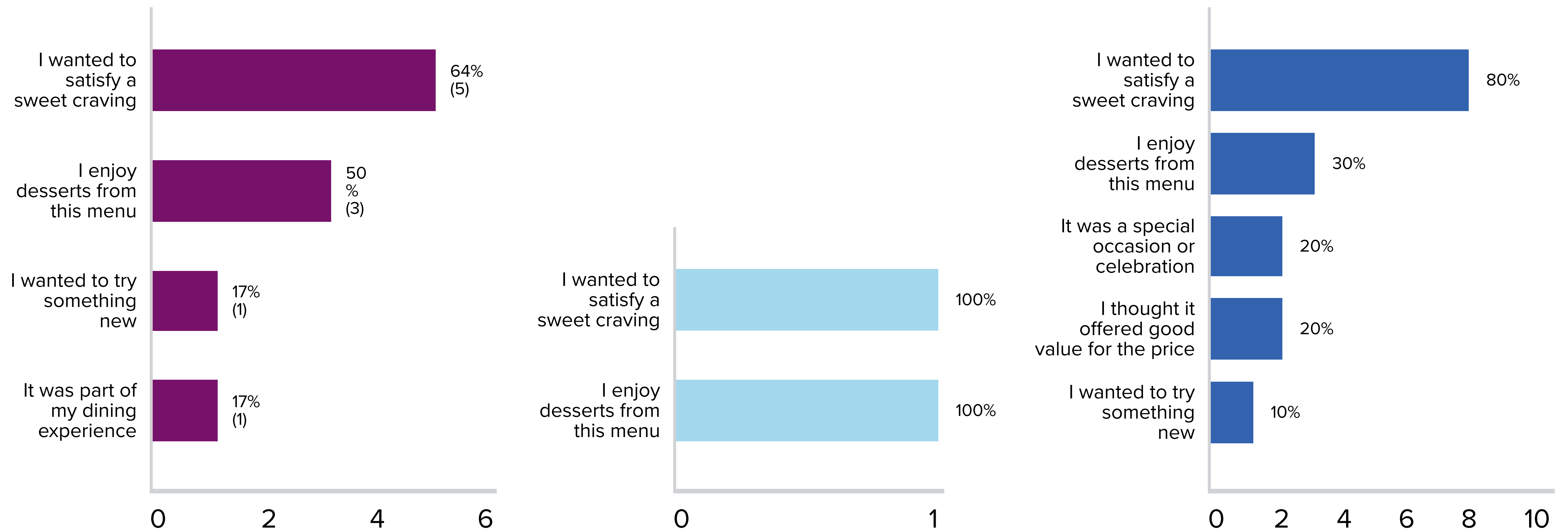


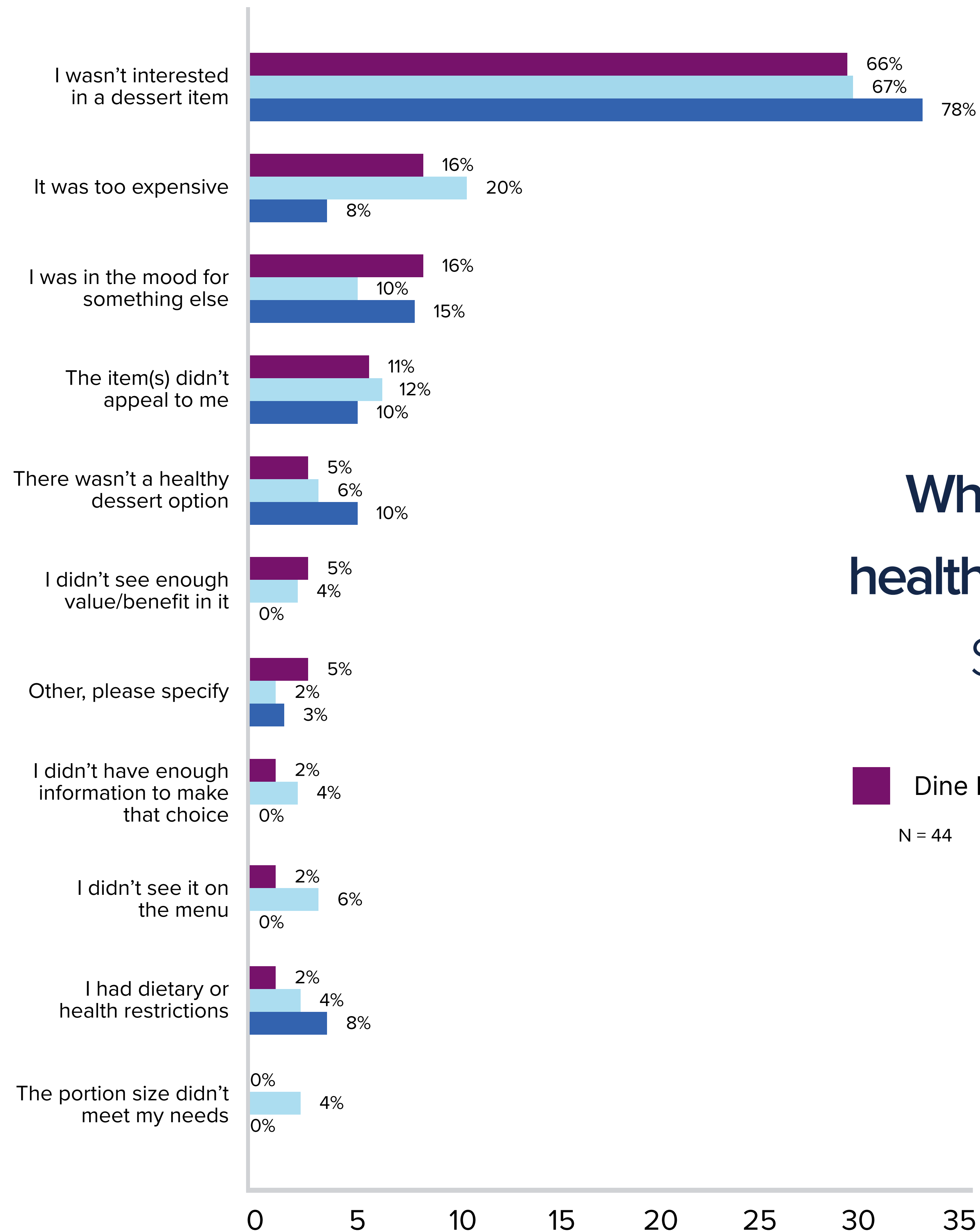
Why did you order something off of the dessert menu?

Select all that apply.




■ Dine In ■ Drive Thru ■ Mobile Order

N = 6 N = 1 N = 10





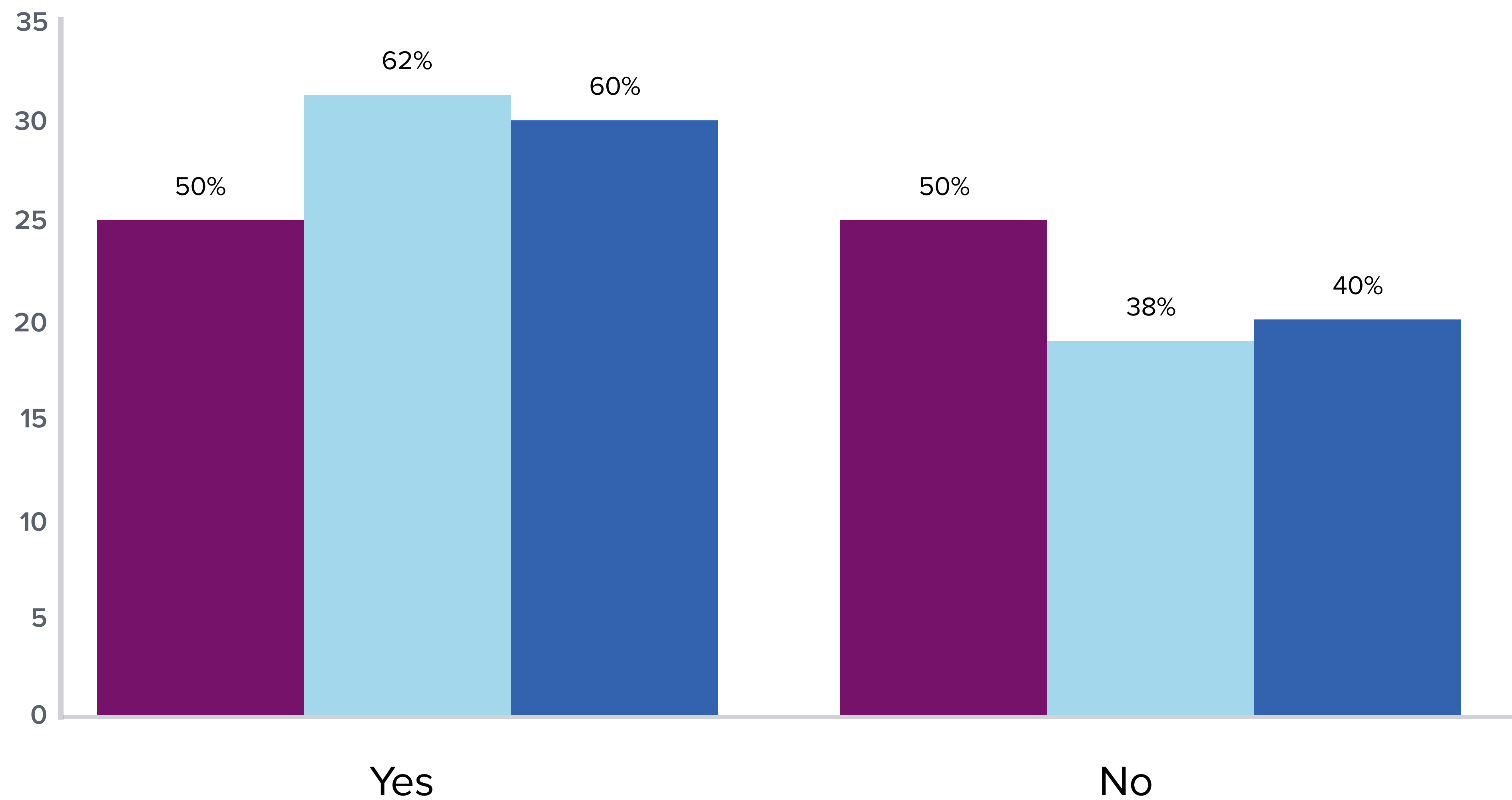
Why didn't you choose a healthy item off of the menu?
Select all that apply.

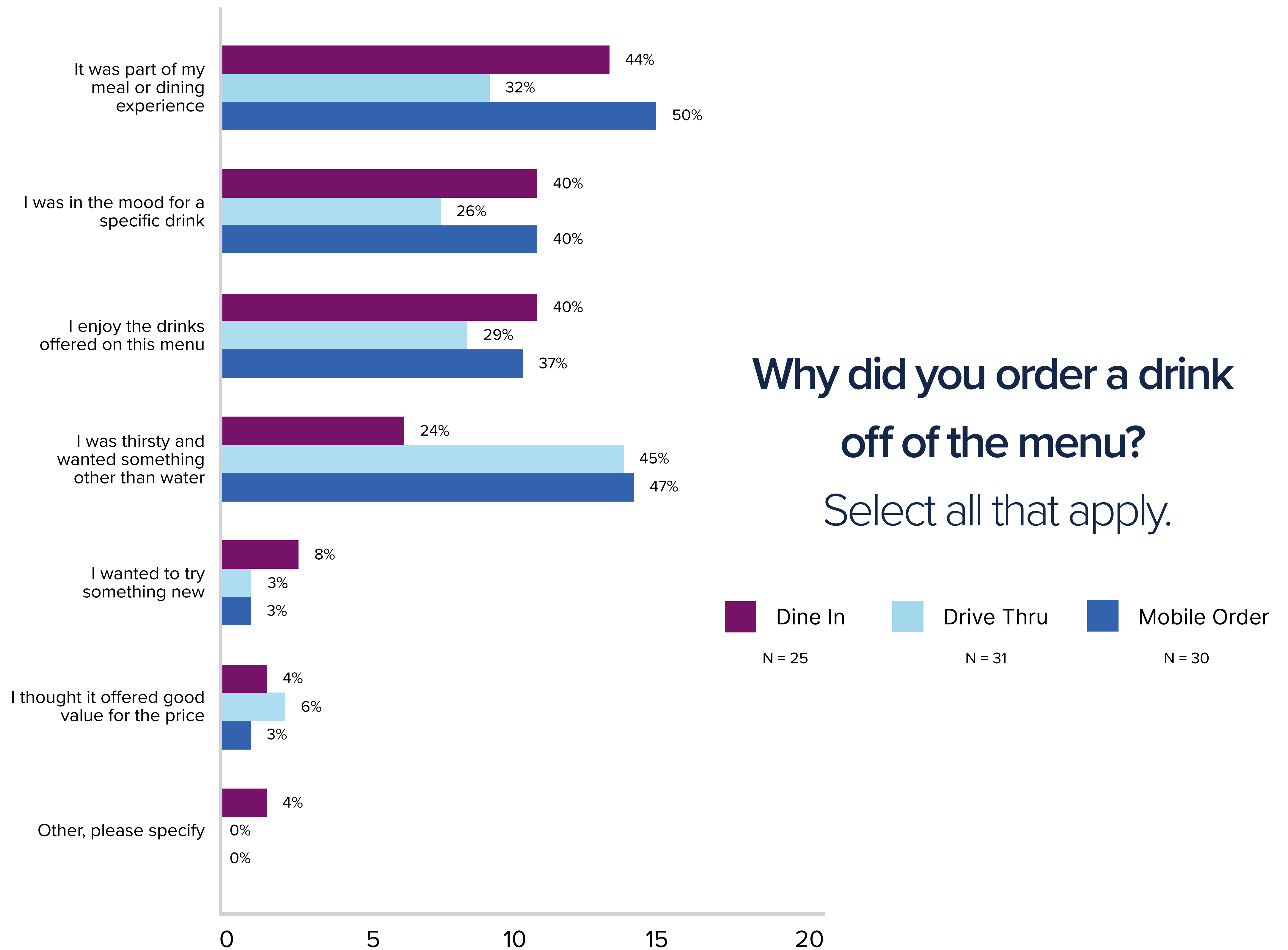
 Dine In N = 44  Drive Thru N = 49  Mobile Order N = 40

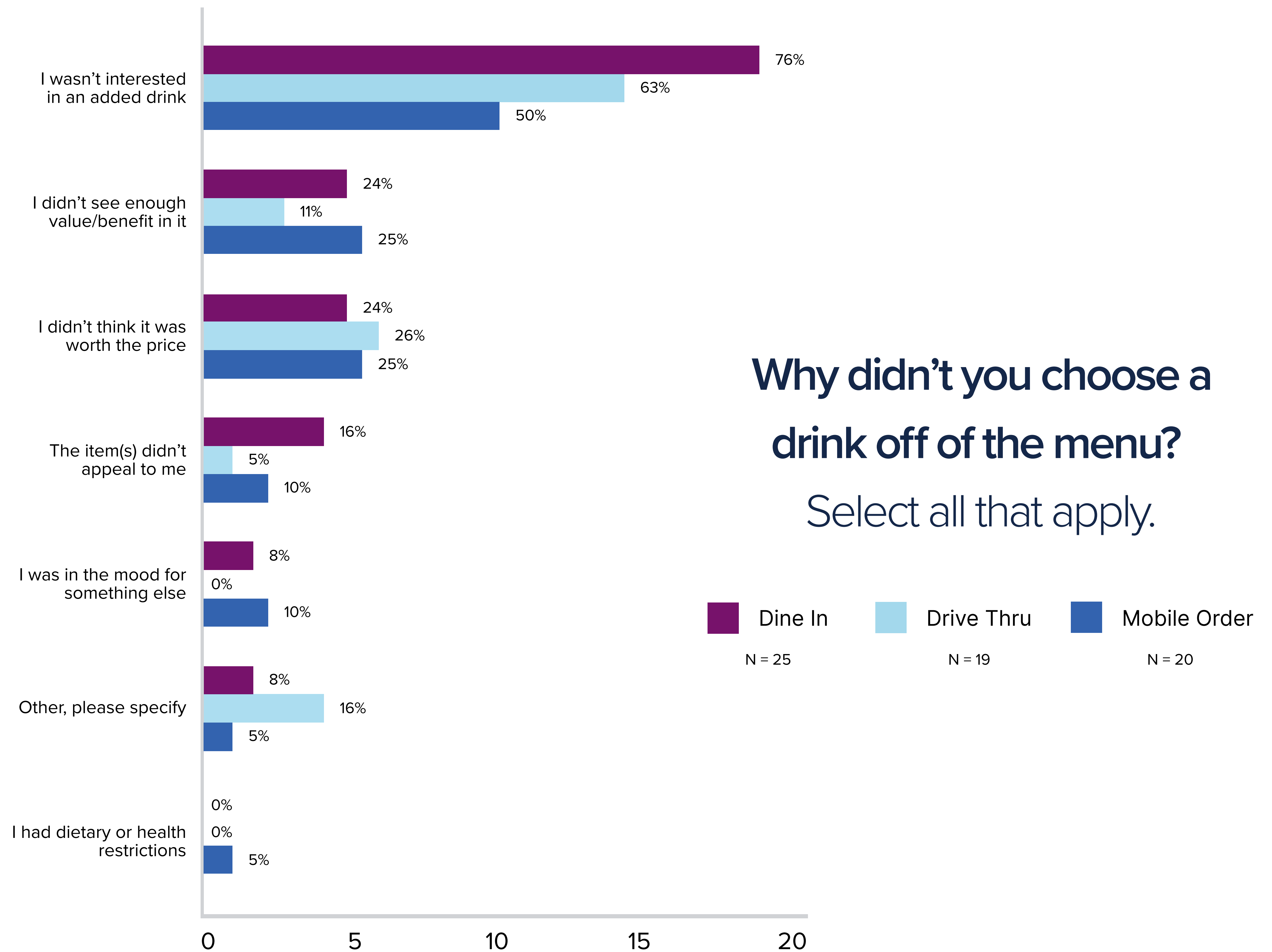
Did you order a drink (besides water) off the menu?

Dine In Drive Thru Mobile Order

N = 150









Perception of Restaurant, Employees, and Service

Perception Changes Based on Channel

While overall experience ratings are high across all channels (72-76%), the data shows that **"customer service" means different things depending on the channel.**

For **dine-in**, where human interaction is more direct, customer service is highly important (54%). The high ratings for staff friendliness (68%) are positive, but the desire for service to be "extremely" or "very important" suggests customers are looking for more than just basic competence; they desire a truly engaging and welcoming experience. This is an opportunity for QSRs to invest in advanced customer service training for dine-in staff, focusing on personalized interactions, proactive assistance, and creating a comfortable atmosphere that goes beyond simply taking an order.

In the **drive-thru**, where speed is king, customer service is still important for 48% of customers. Despite the transactional nature, staff friendliness (76%) is highly rated. This indicates that a brief, positive human touch – a "speed with a smile" approach – can significantly mitigate frustrations caused by slightly longer wait times or minor accuracy issues.

Mobile order presents a unique definition of "customer service." While direct human interaction is often minimal, 46% of customers still consider customer service "extremely" or "very important." This strongly suggests that for mobile ordering, "customer service" encompasses the entire digital journey: app usability, intuitive navigation, accurate order fulfillment, clear status updates, and a seamless pickup process. The high ratings for mobile order staff friendliness (80%), helpfulness (70%), and professional appearance (82%) are likely a reflection of the overall seamlessness of the mobile ordering experience leading to positive interaction, rather than extensive direct engagement. Any friction in the app or at pickup, therefore, directly impacts the perception of "service." This emphasizes the critical need for continuous investment in mobile app UX/UI and efficient pickup workflows to maintain this high perception of service quality.

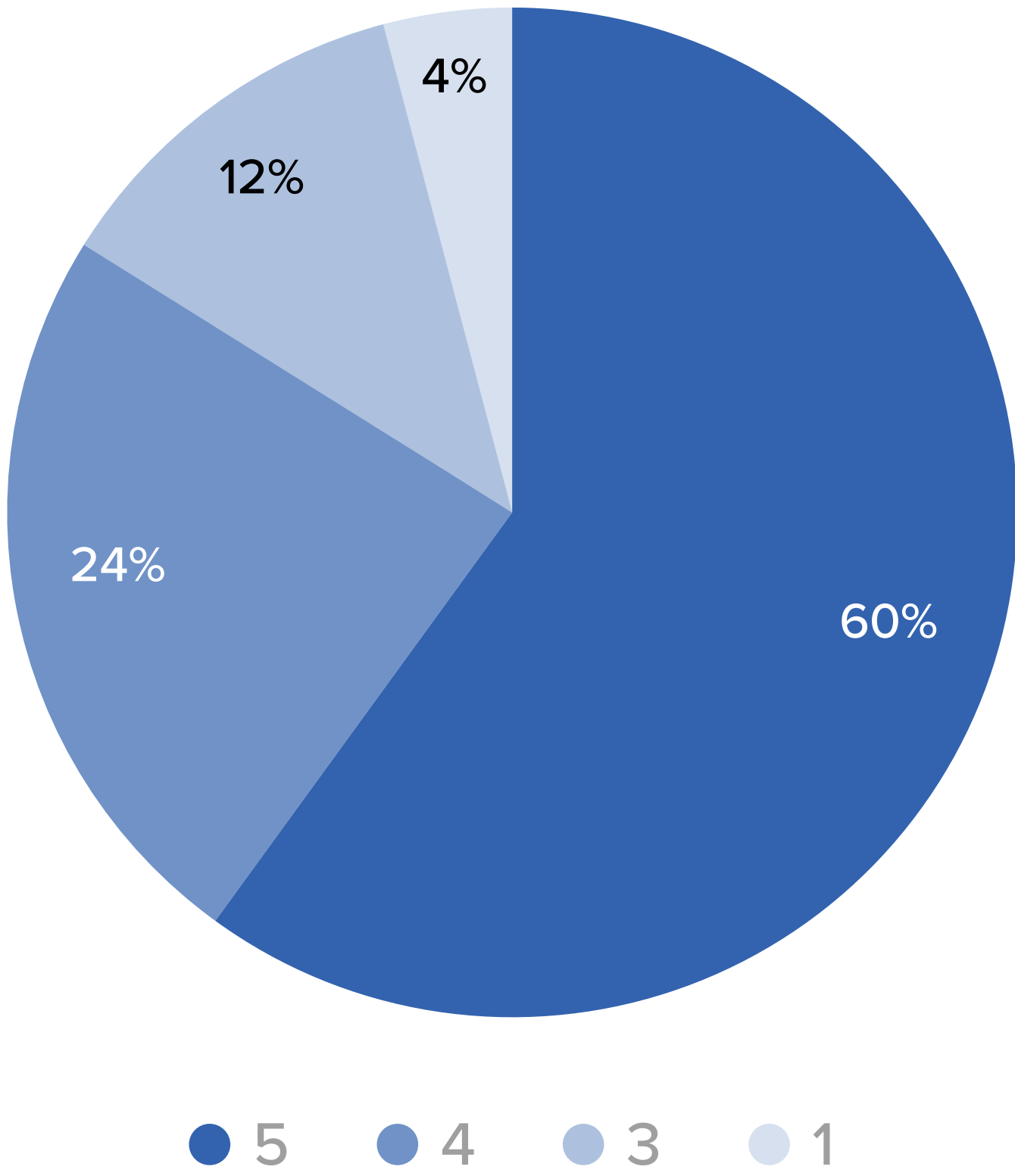
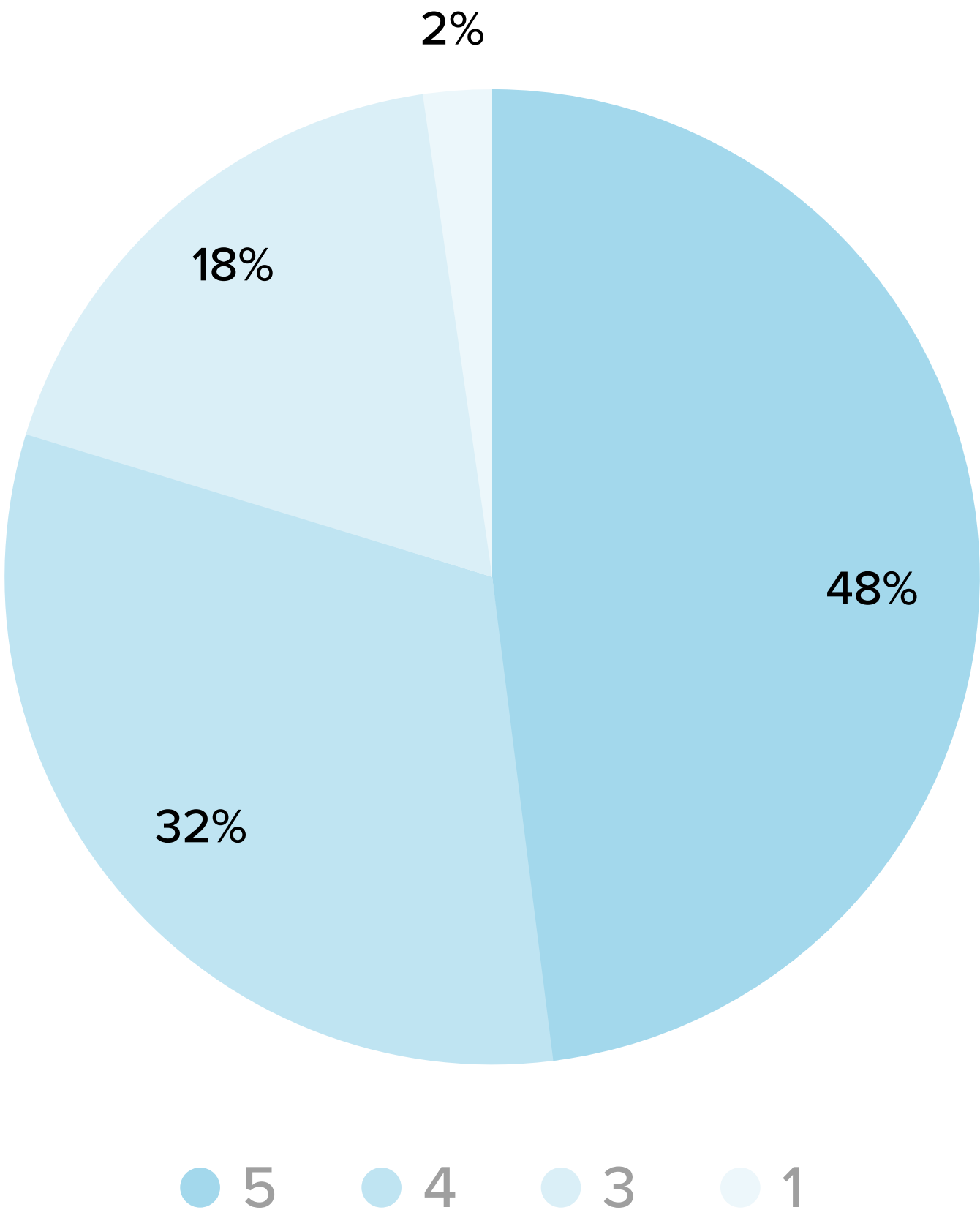
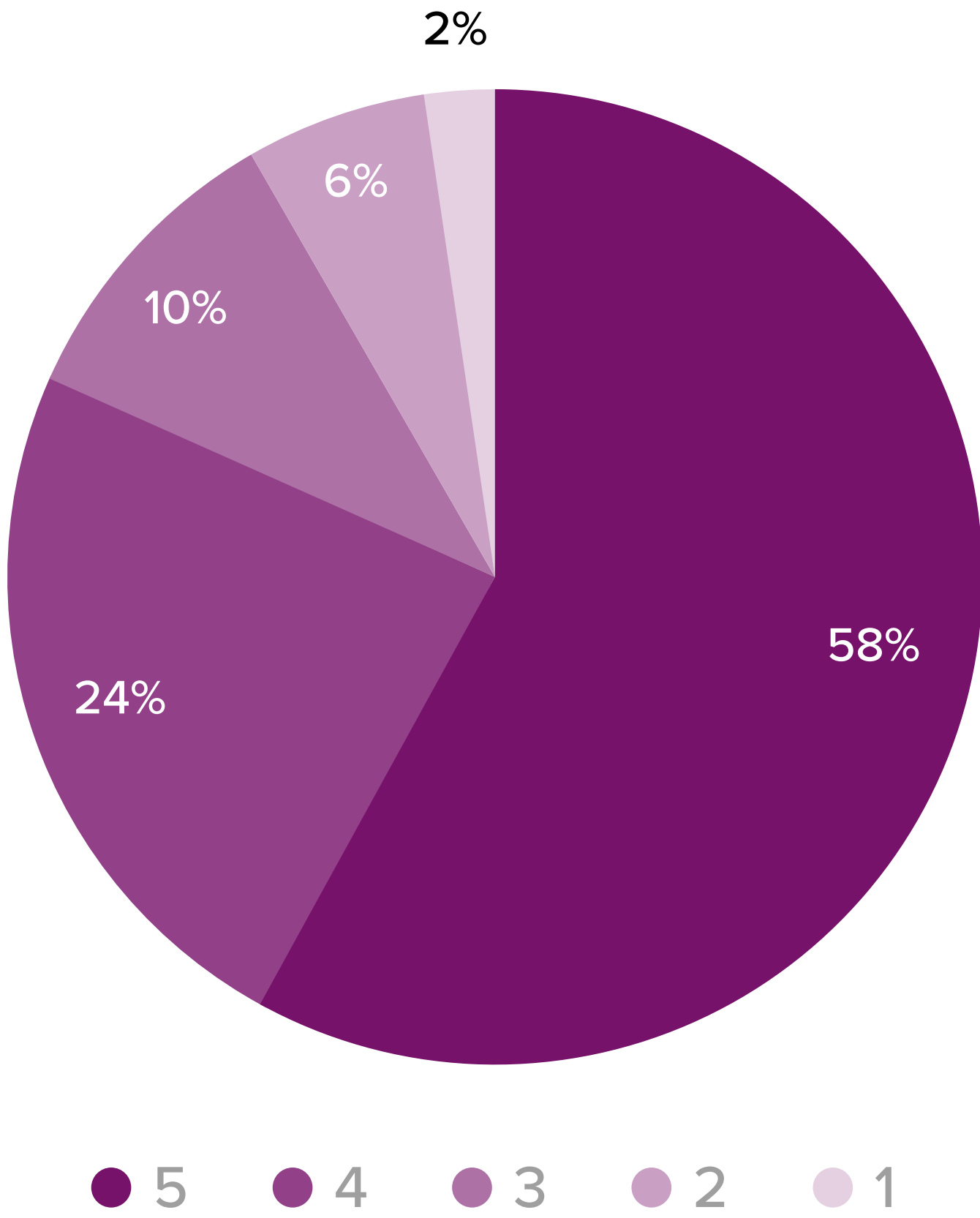
QSRs cannot apply a one-size-fits-all approach to service improvement; each channel requires tailored strategies that address its unique pain points and leverage its distinct strengths.

Rate the speed of service.

Scale from 1 (very slow) to 5 (very fast).

Dine In Drive Thru Mobile Order

N = 150

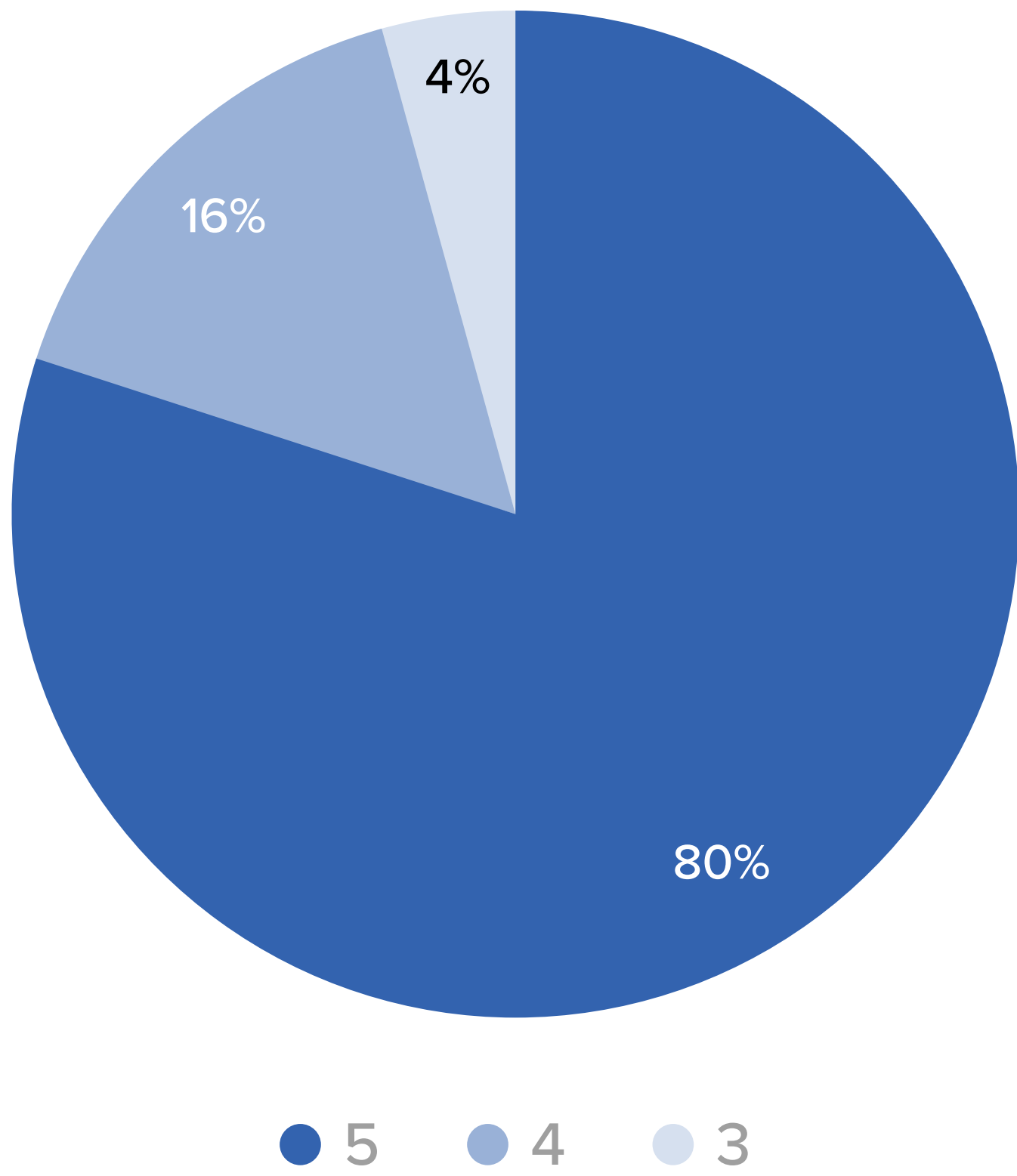
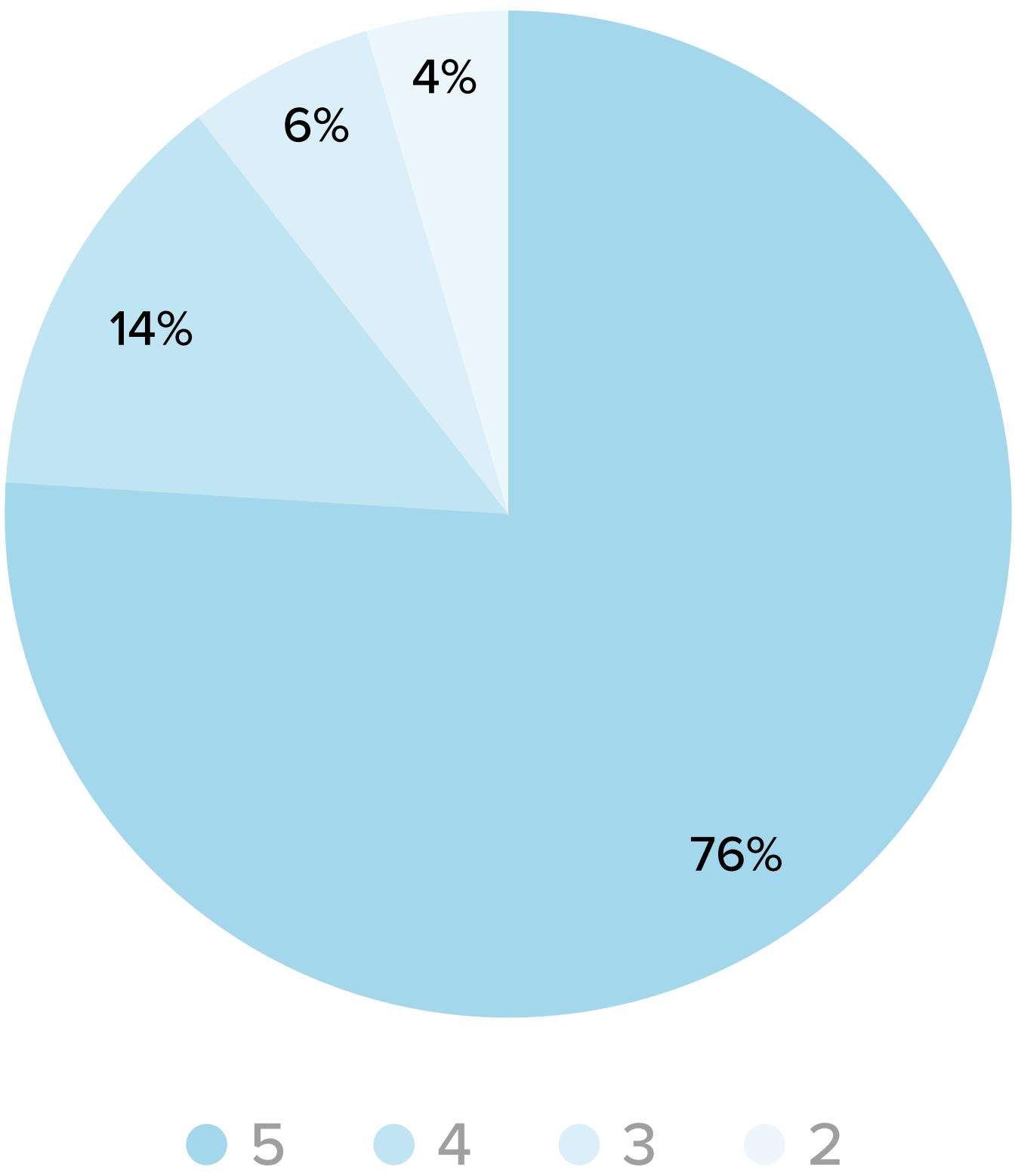
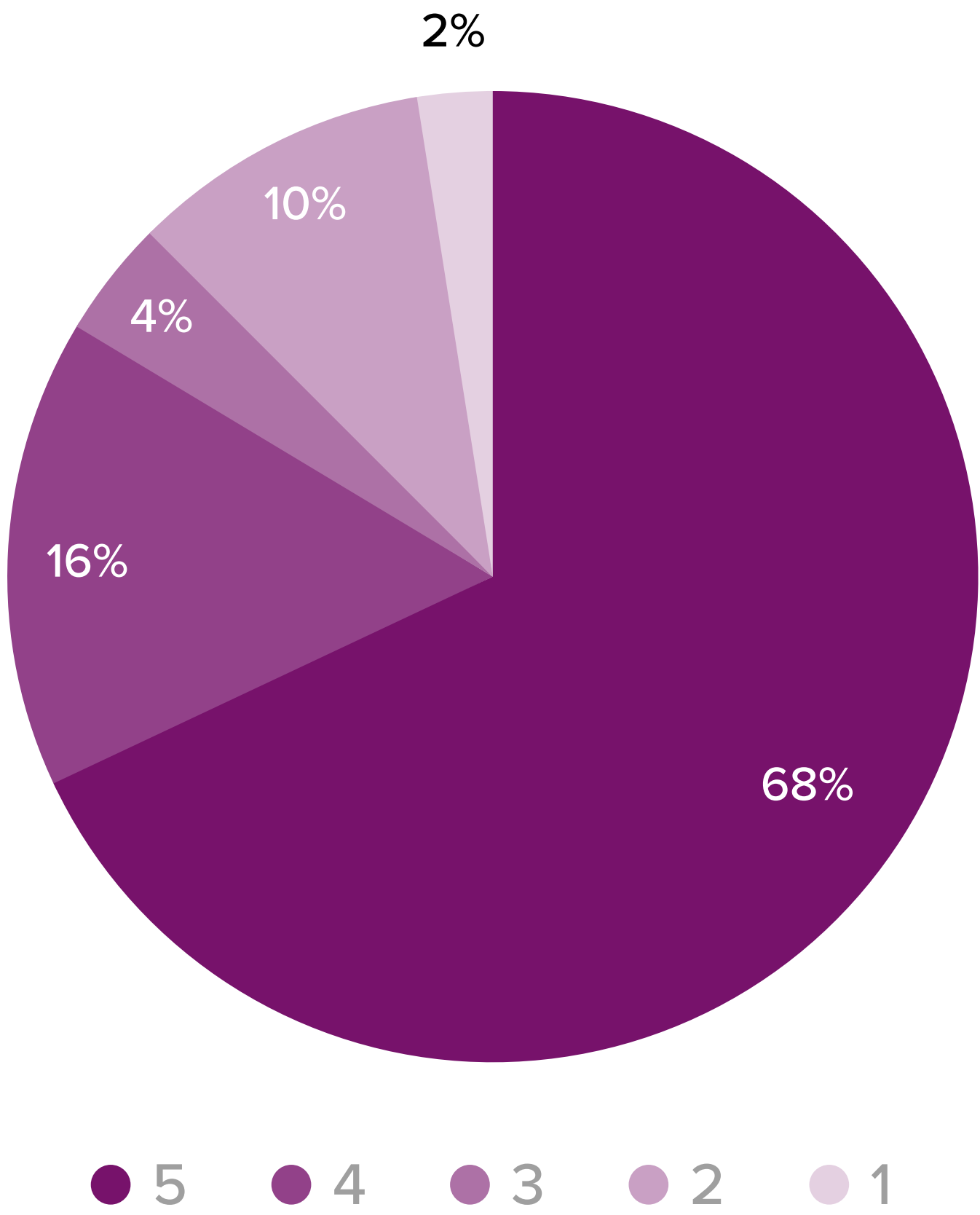


Rate the friendliness of staff.

Scale from 1 (very poor) to 5 (very excellent).

Dine In Drive Thru Mobile Order

N = 150

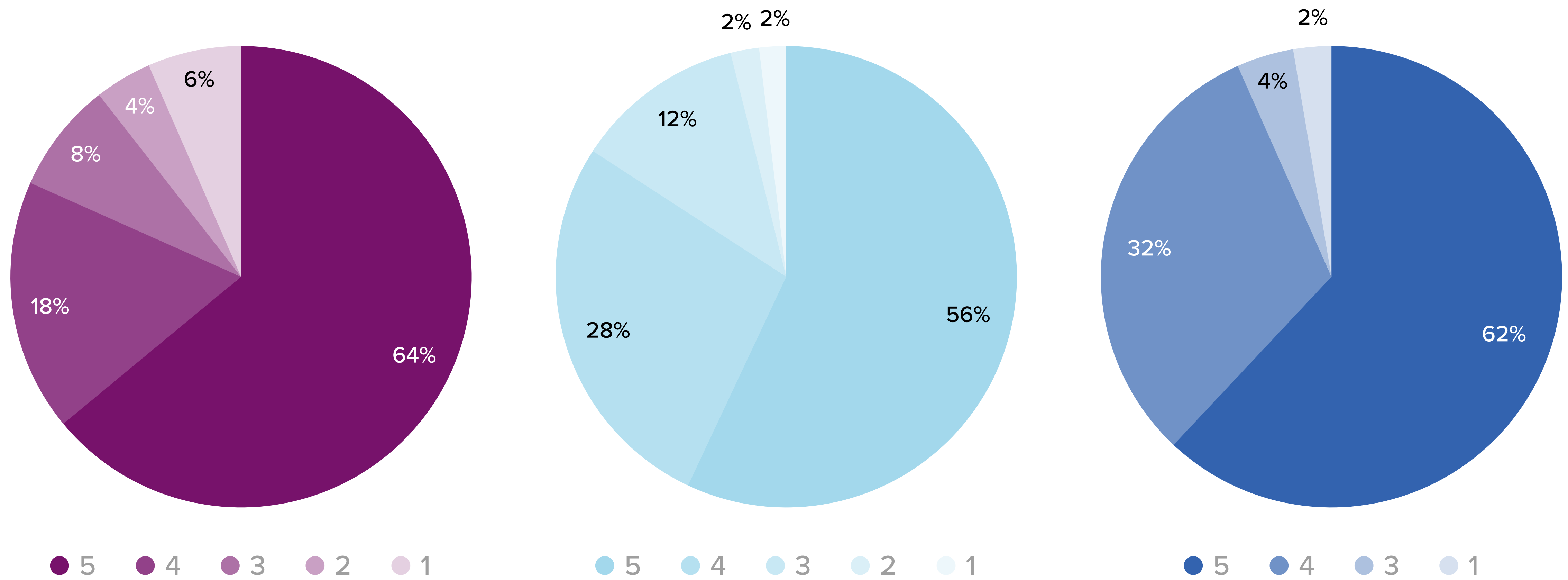


Rate the clarity of communication.

Scale from 1 (very poor) to 5 (very excellent).

Dine In Drive Thru Mobile Order

N = 150

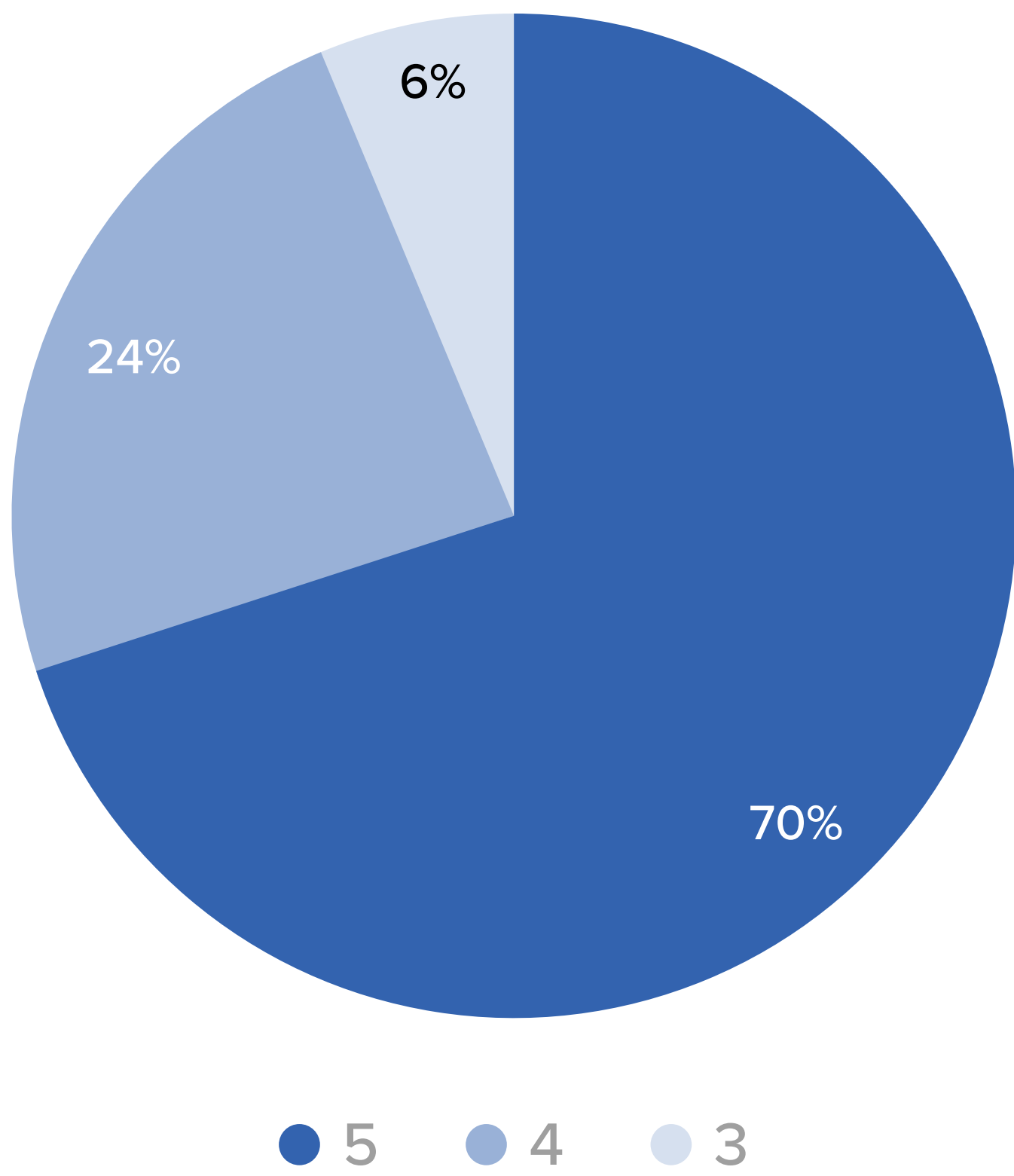
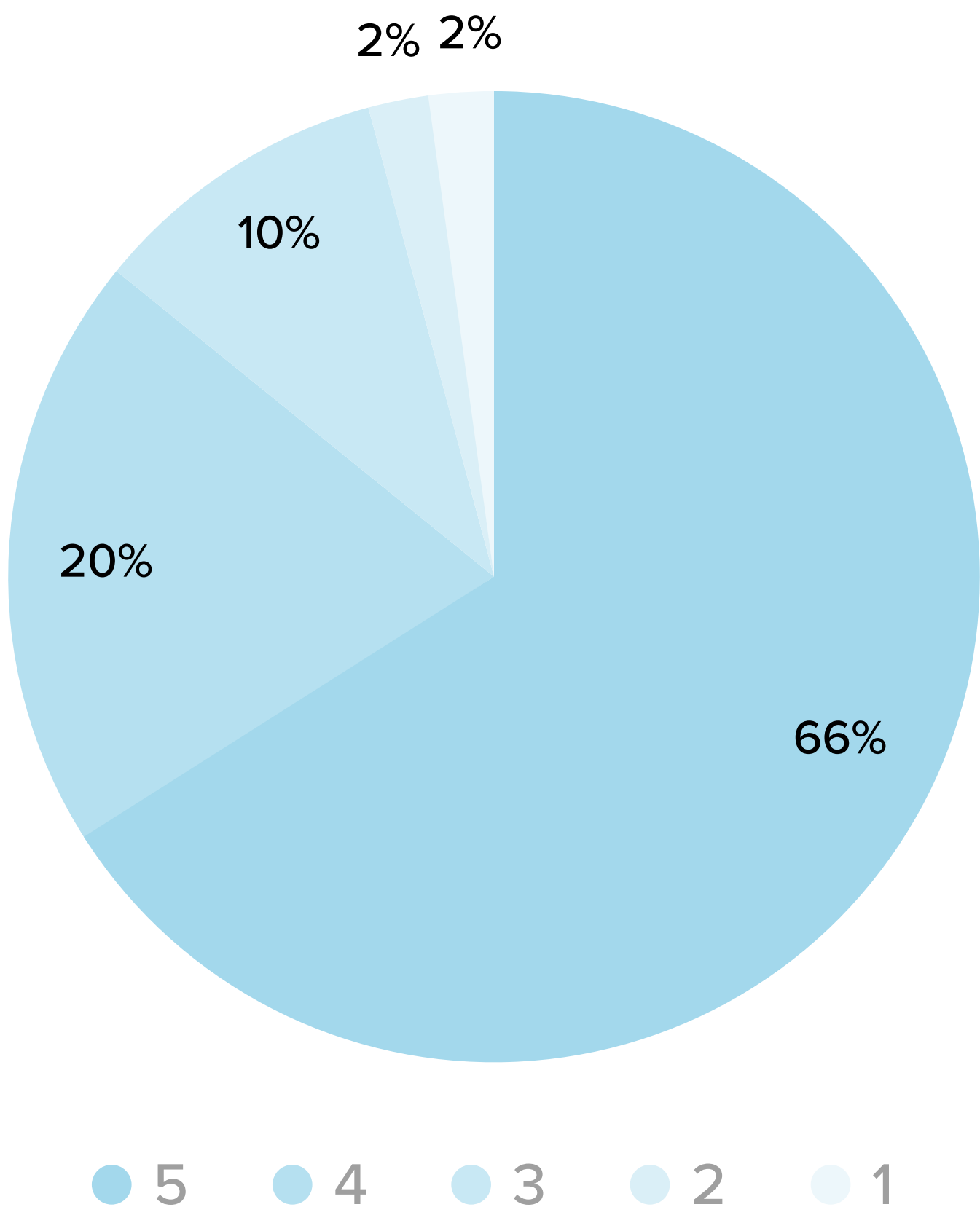
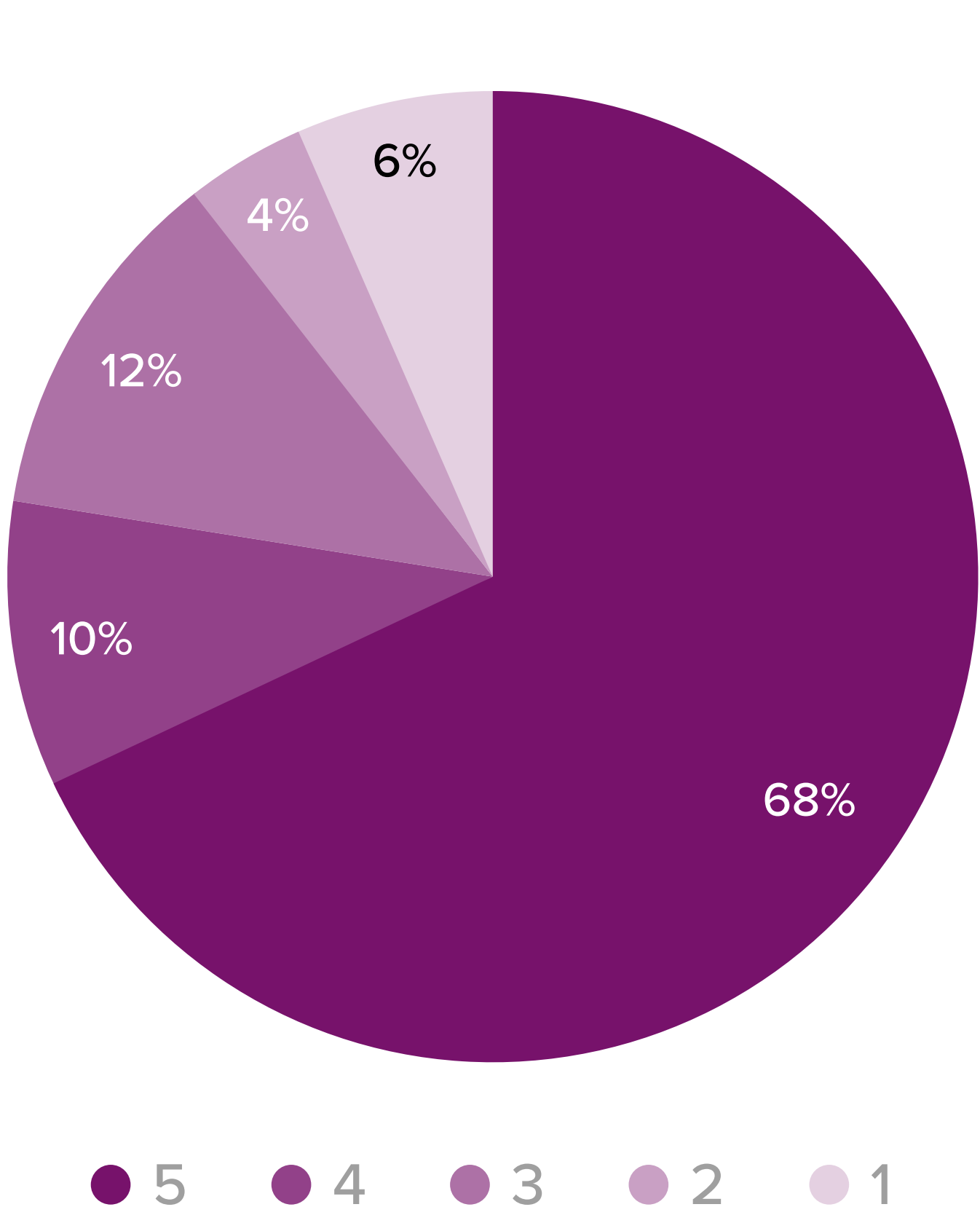


Rate the helpfulness of staff.

Scale from 1 (very poor) to 5 (very excellent).

Dine In Drive Thru Mobile Order

N = 150

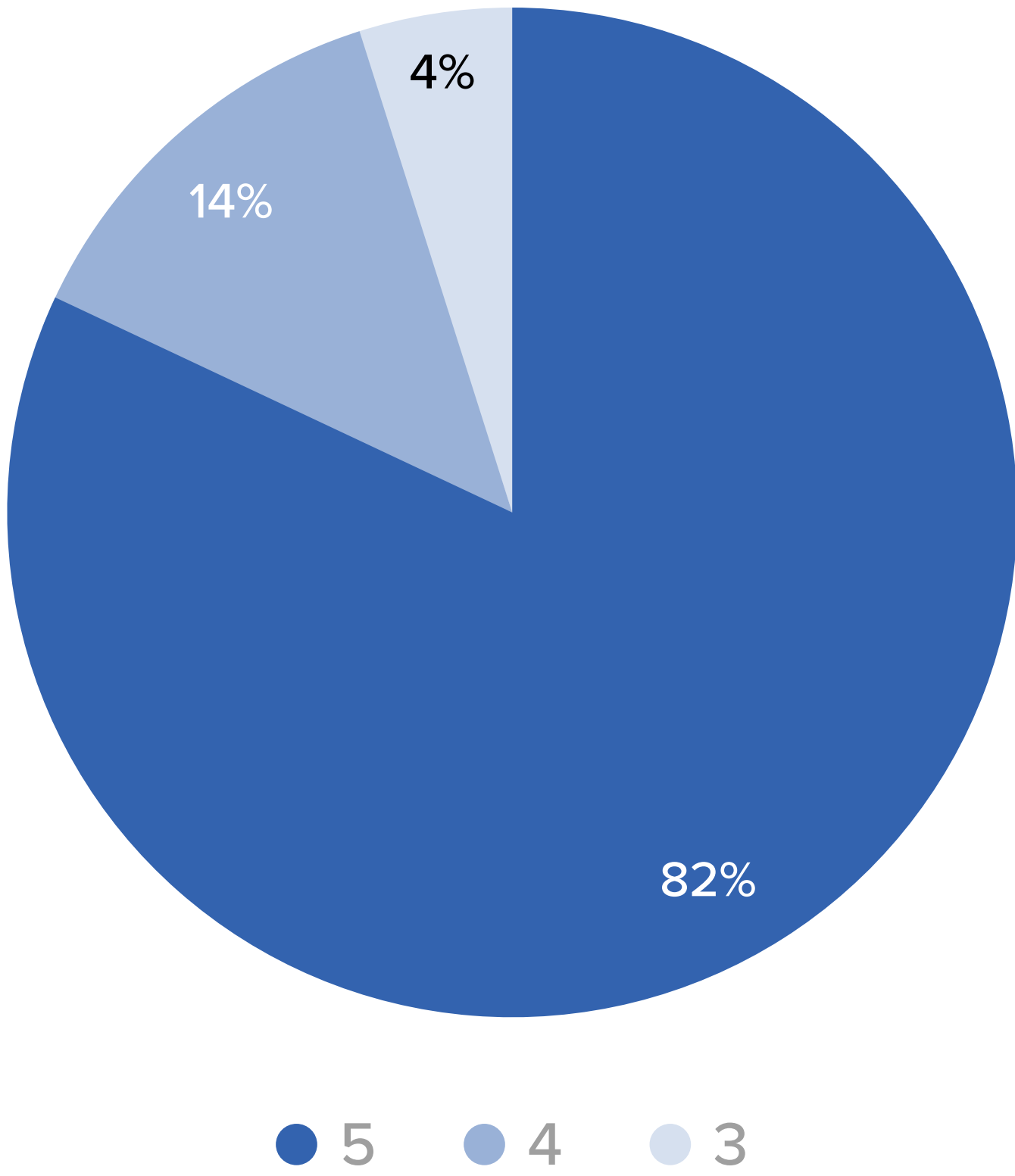
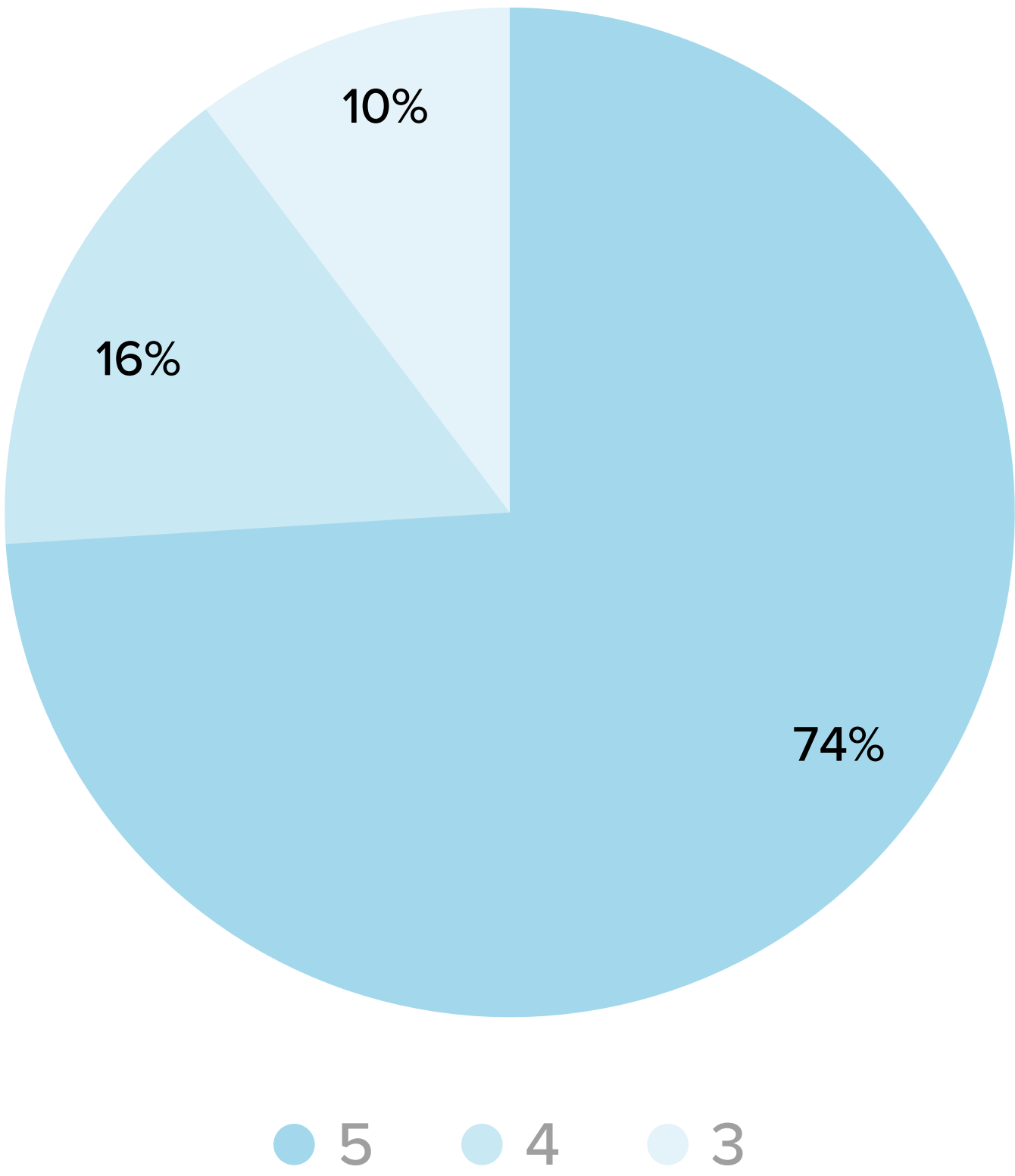
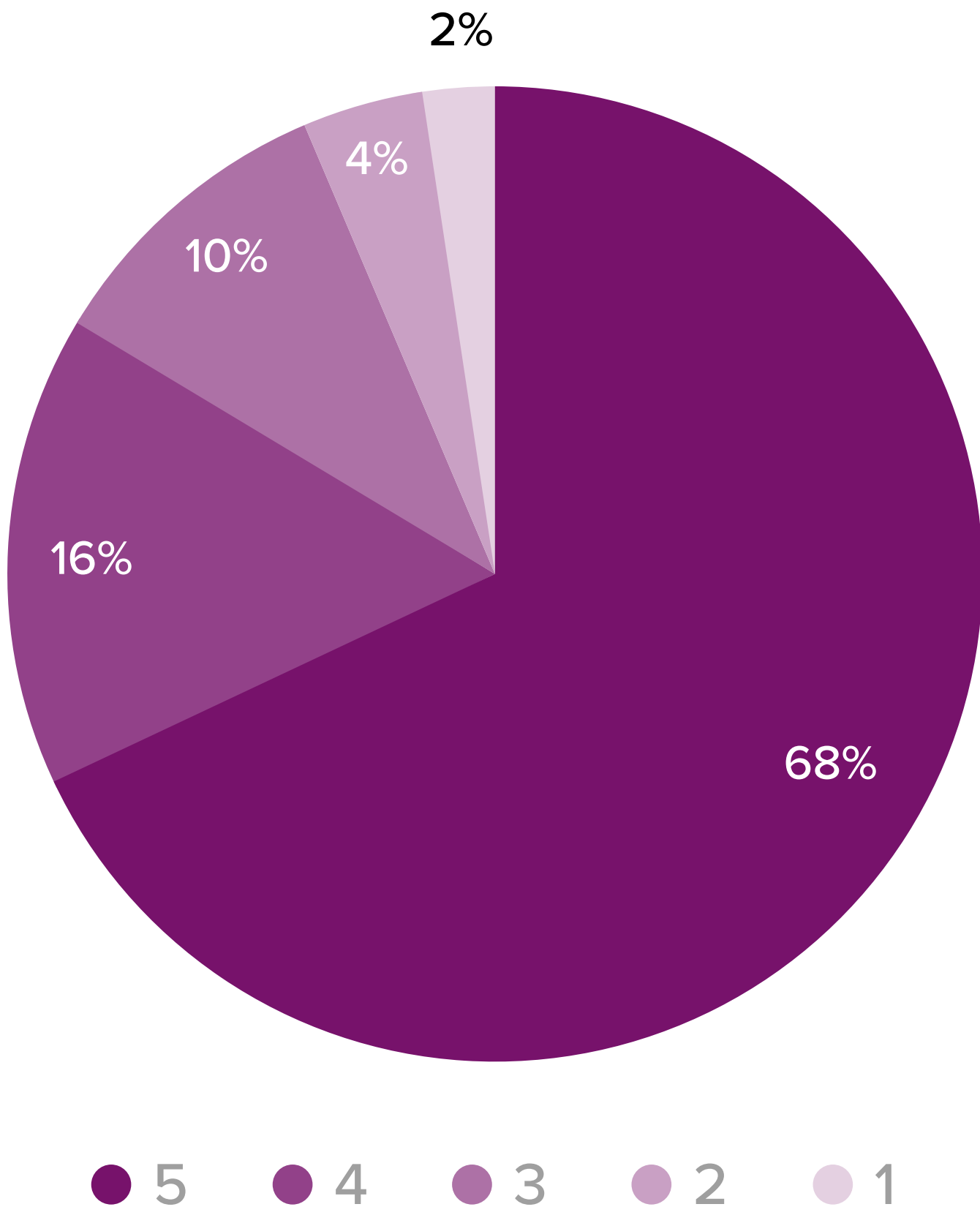


Rate the professional appearance of staff.

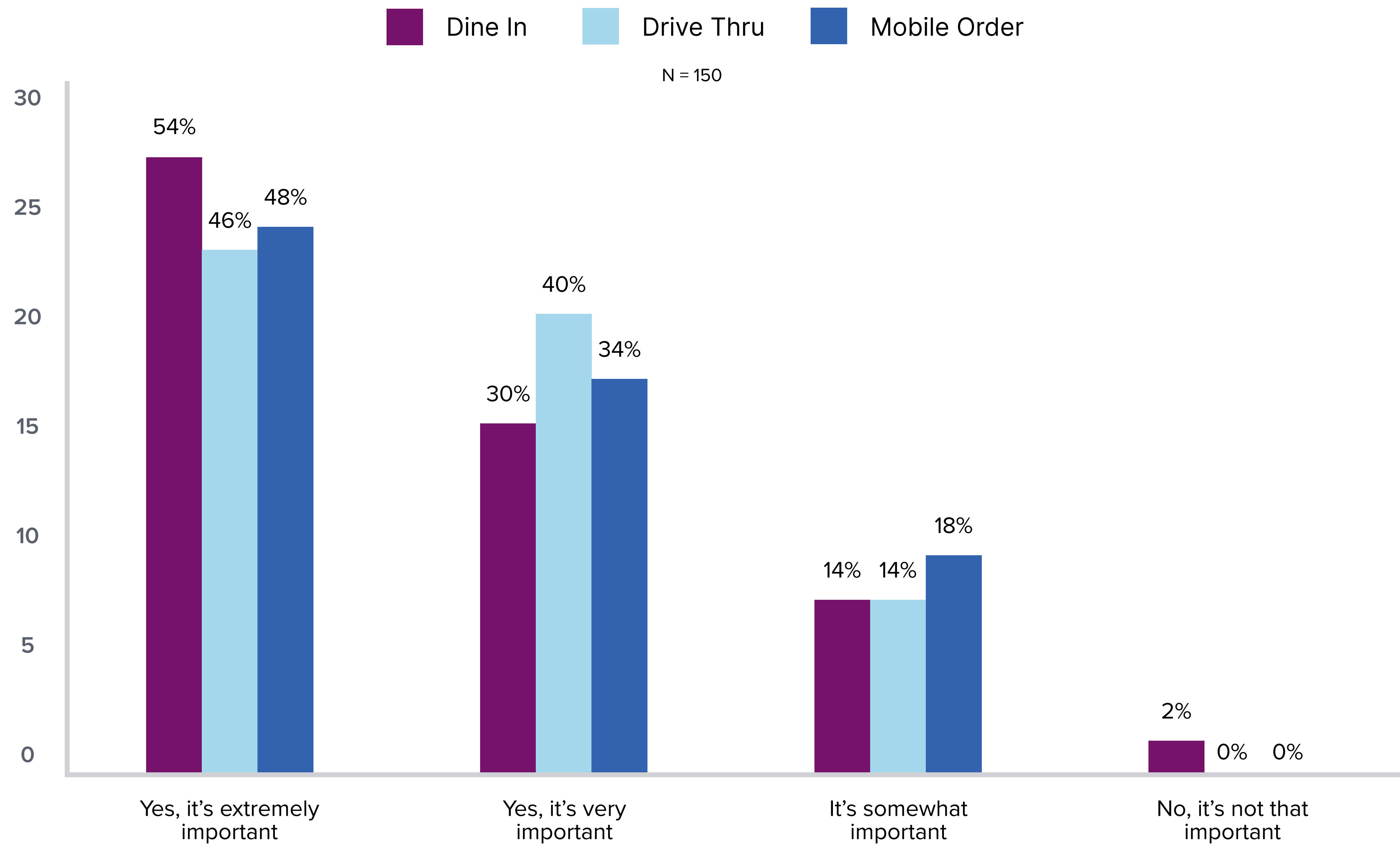
Scale from 1 (very poor) to 5 (very excellent).

Dine In Drive Thru Mobile Order

N = 150



Did the customer service influence how frequently you would visit or order from this restaurant in the future?





Perception of Food Quality, Packaging, and Options

Food Quality and Packaging

The data reveals that **mobile ordering** has unexpectedly become the champion of food quality delivery.

While **food taste receives consistently positive ratings across all channels** (52-56%), indicating a general satisfaction with the core product, the superiority of **mobile order** in **food temperature** (66% warm to hot) and **freshness** (74% good to fresh) is a standout finding. This defies the intuitive expectation that immediate consumption (dine-in) or quick handoff (drive-thru) would yield the best results. This suggests that the structured process of mobile ordering – often involving precise timing of food preparation to customer arrival, efficient staging, and rapid pickup – is highly effective at preserving and delivering optimal food quality. This is a powerful selling point for QSRs to leverage in their marketing for mobile ordering.

QSRs should meticulously analyze their mobile order workflows and operational best practices to identify elements that contribute to this superior quality and then replicate or adapt them for dine-in and drive-thru operations to improve overall consistency.

Packaging is another area where **mobile order** excels, with a stellar 96% rating for being "well packaged and easy to eat." This is notably higher than dine-in (88%) and drive-thru (86%). For off-premise mobile orders, packaging is not just a container; it's an extension of the product and the brand experience. It must be robust for transport, maintain food integrity (temperature, freshness), and be convenient for consumption on the go or at home. The high satisfaction rate indicates QSRs are mastering these unique demands for the mobile channel.

The overwhelming majority (88%) of customers across all channels rating portion size as "Just right" is a straightforward win. This indicates a strong alignment between customer expectations and current QSR offerings regarding quantity.

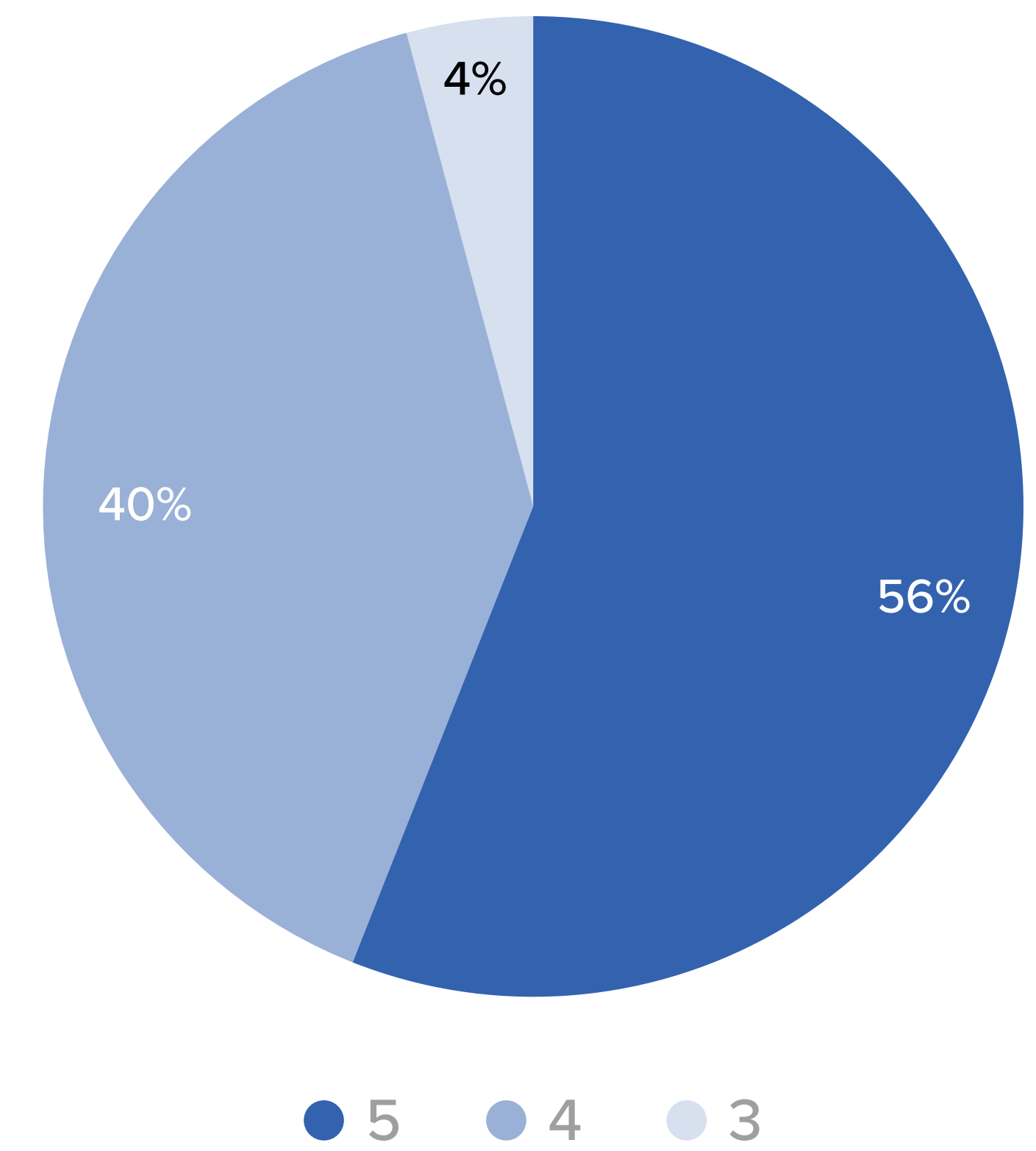
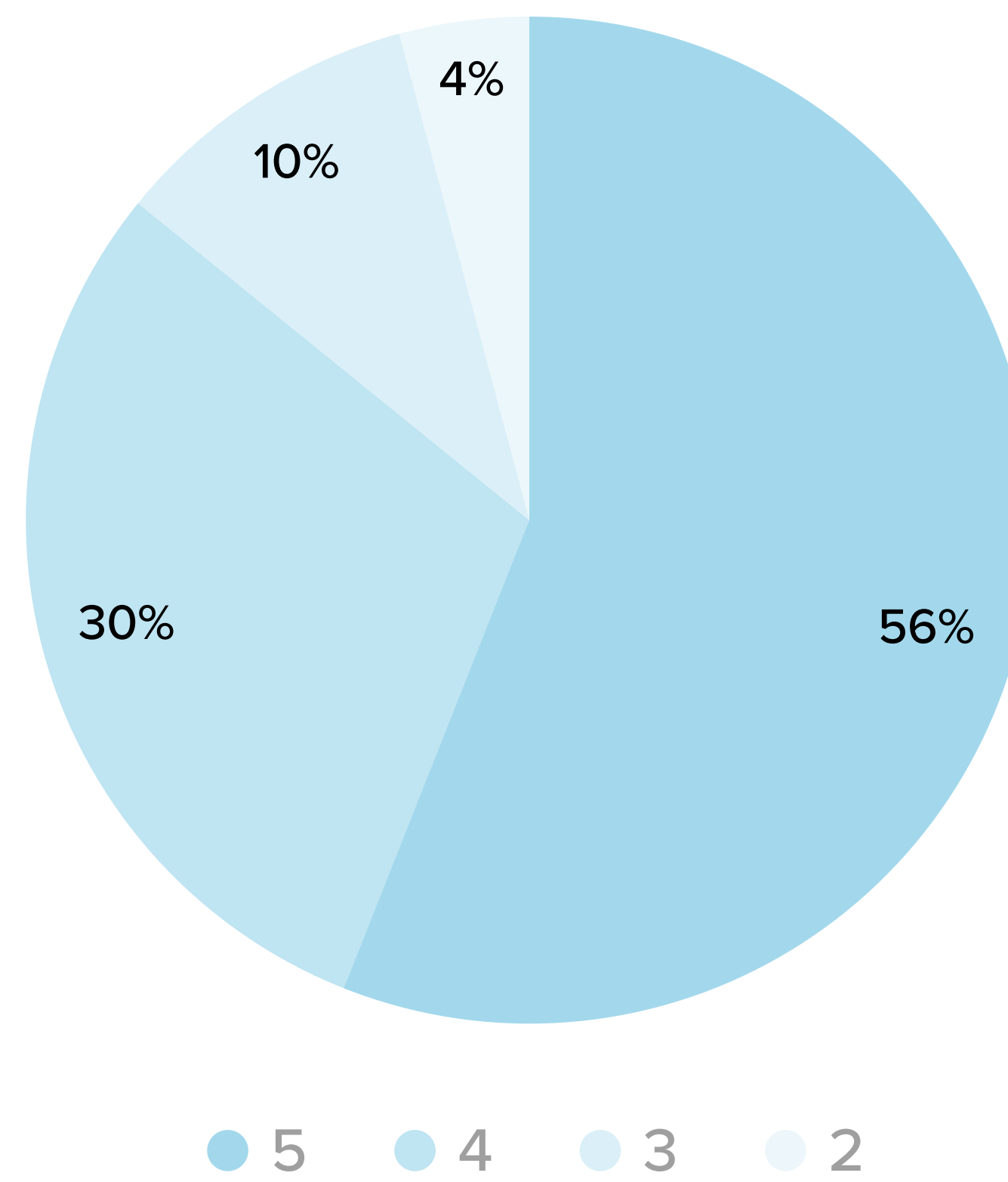
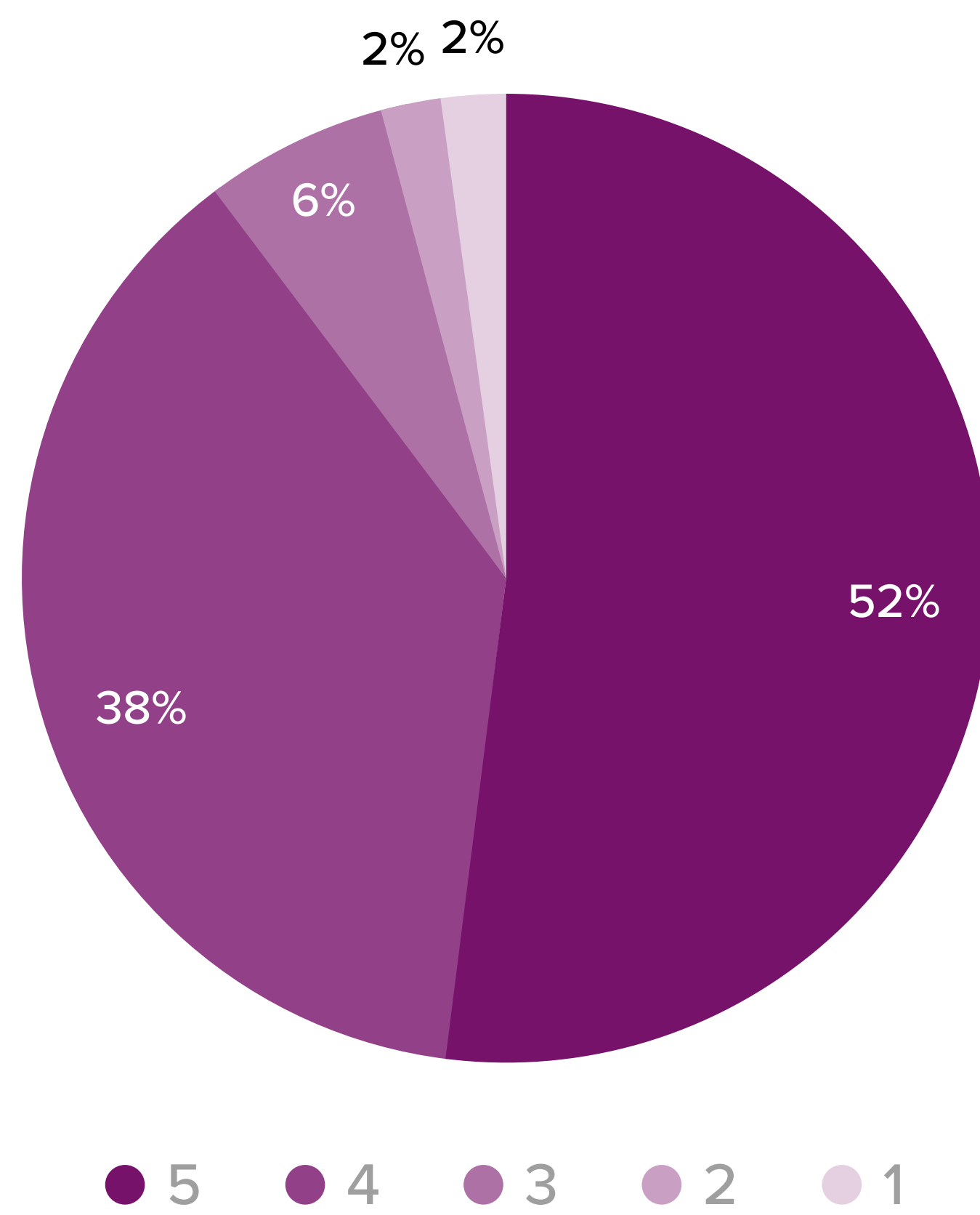
Overall, the data on food quality and packaging highlights that the mobile order channel isn't just about convenience; it's about delivering a superior product experience.

How would you rate the taste of the food you ordered?

Scale from 1 (terrible) to 5 (excellent).

Dine In Drive Thru Mobile Order

N = 150

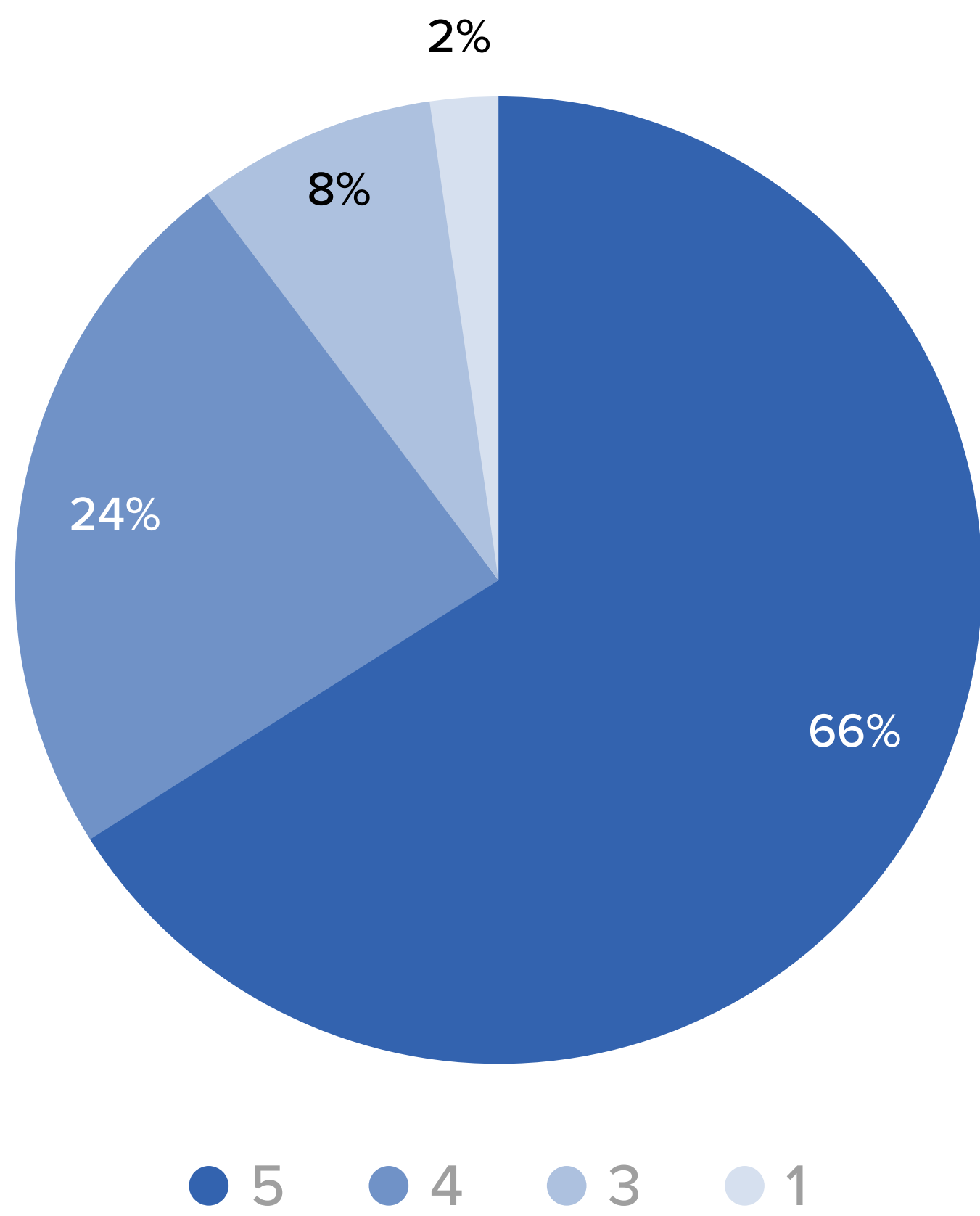
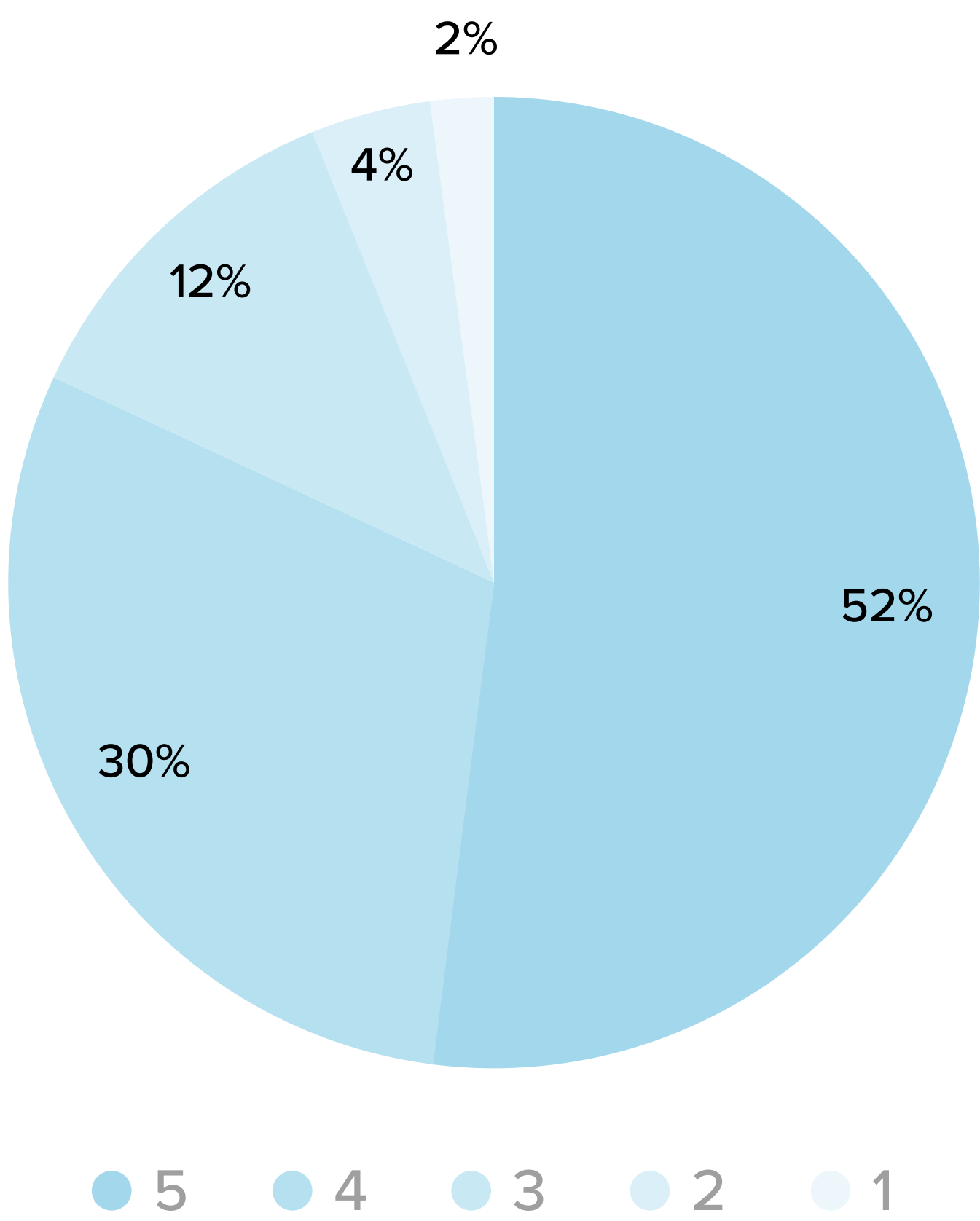
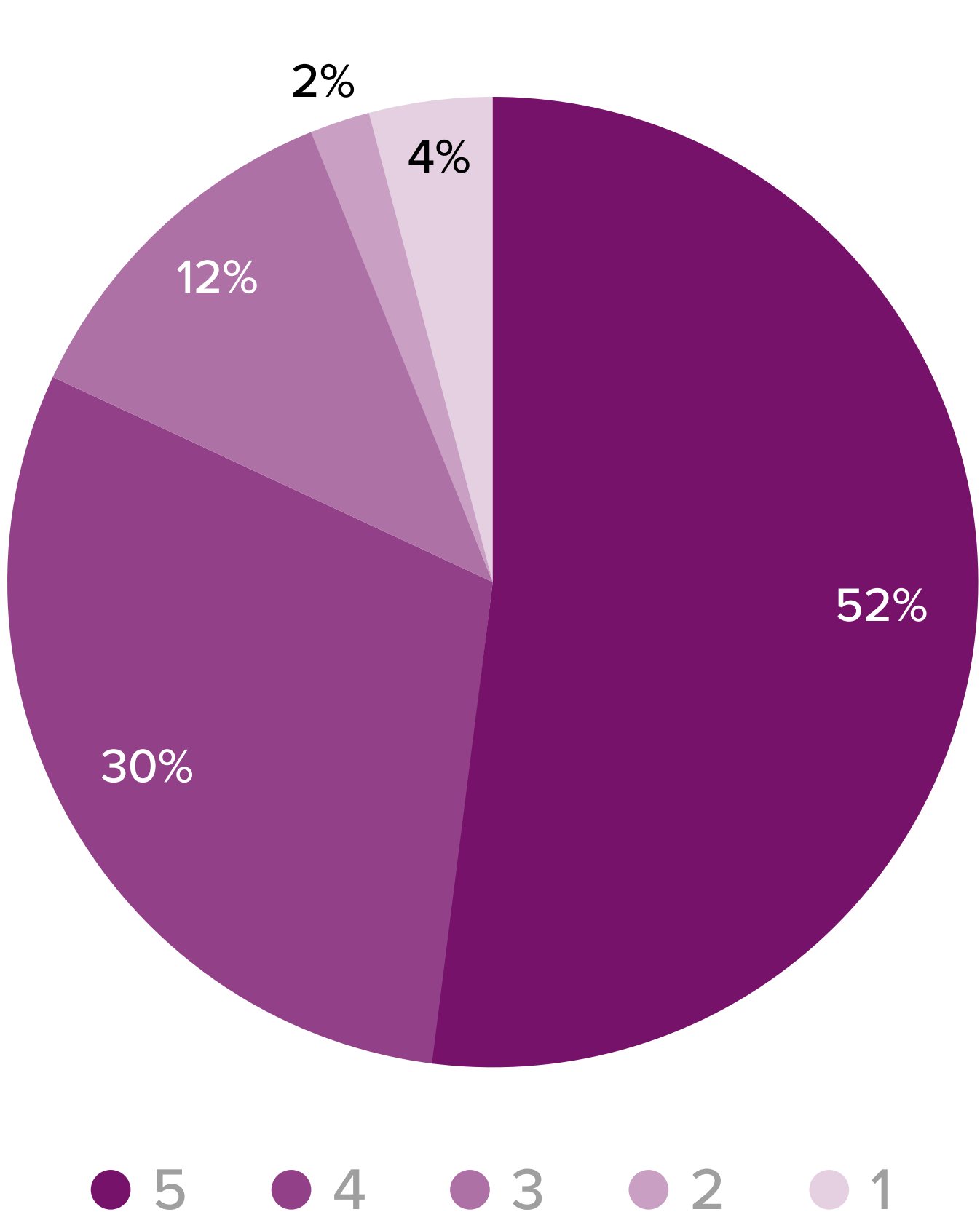


How would you rate the temperature of the food you ordered?

Scale from 1 (cold) to 5 (hot).

Dine In Drive Thru Mobile Order

N = 150

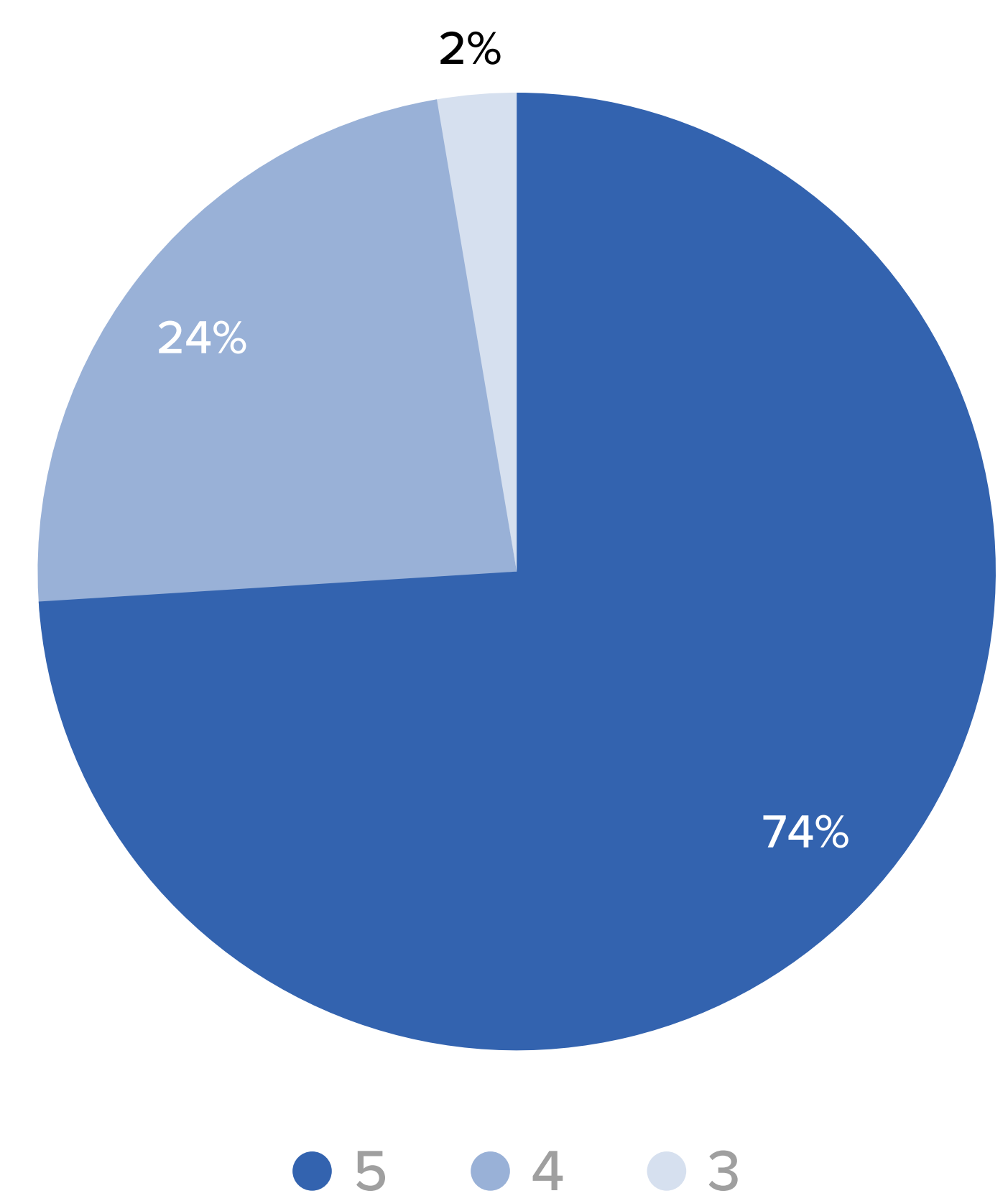
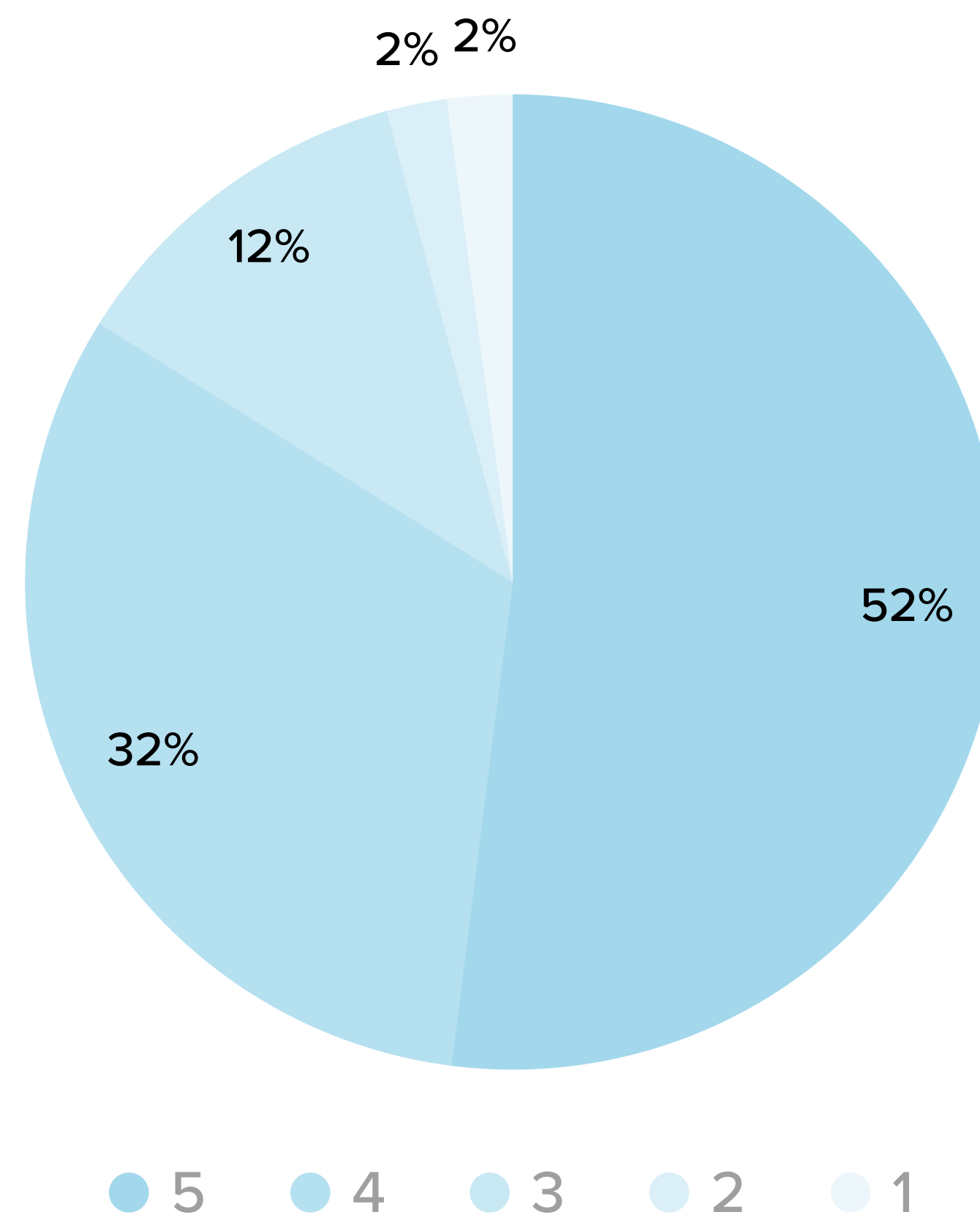
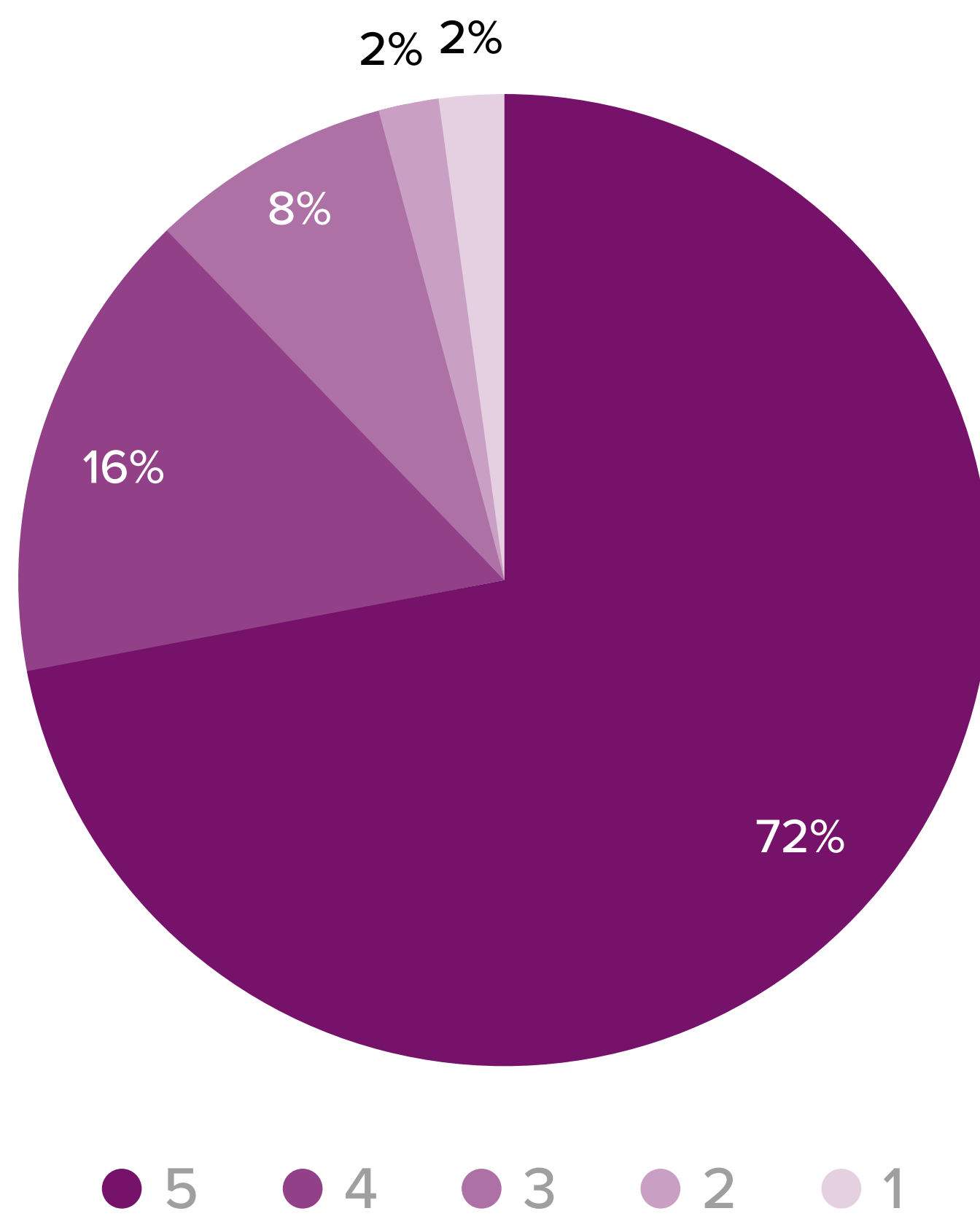


How would you rate the freshness of the food you ordered?

Scale from 1 (stale) to 5 (fresh).

Dine In Drive Thru Mobile Order

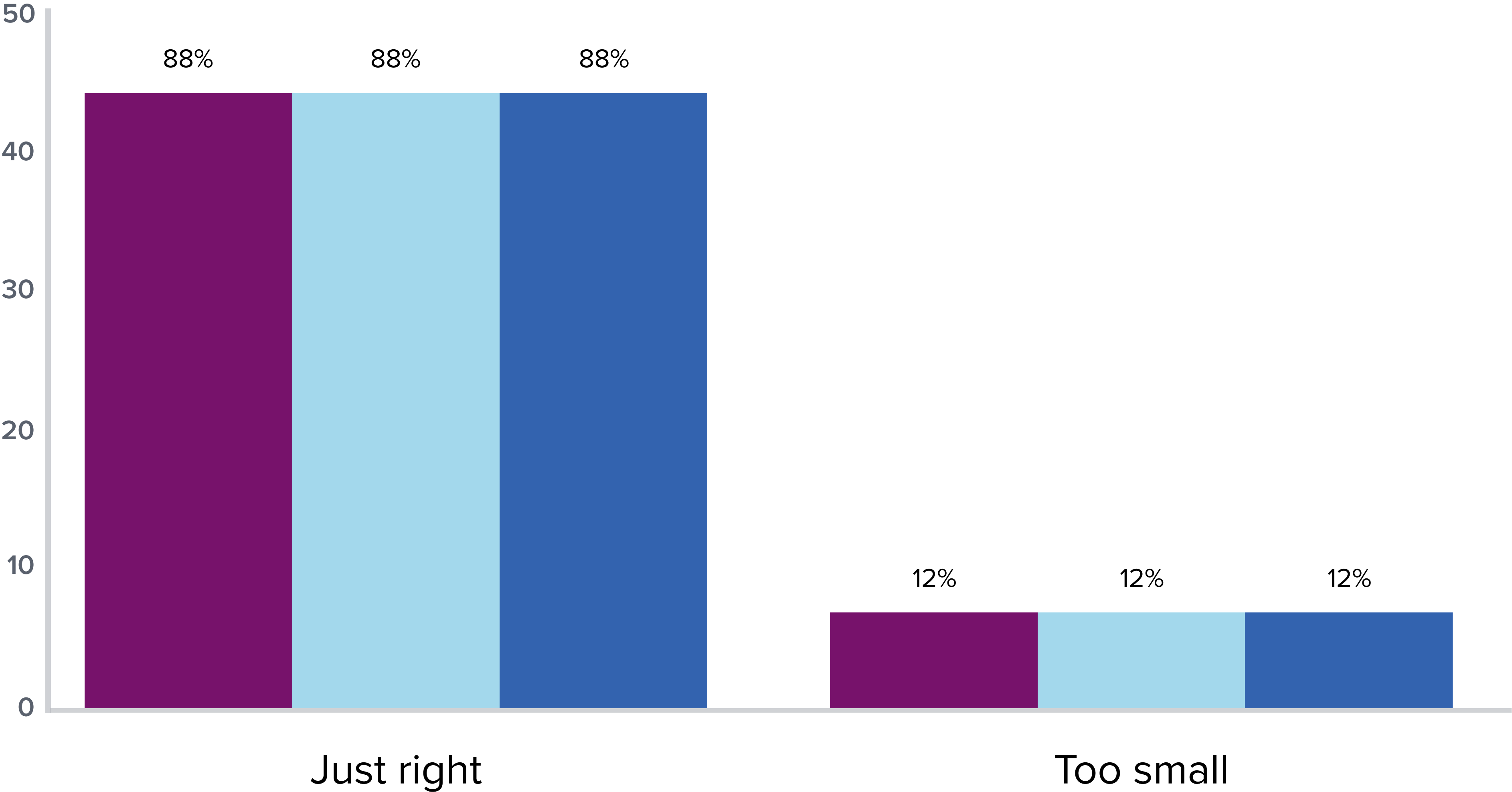
N = 150



How would you rate the portion size of the food?

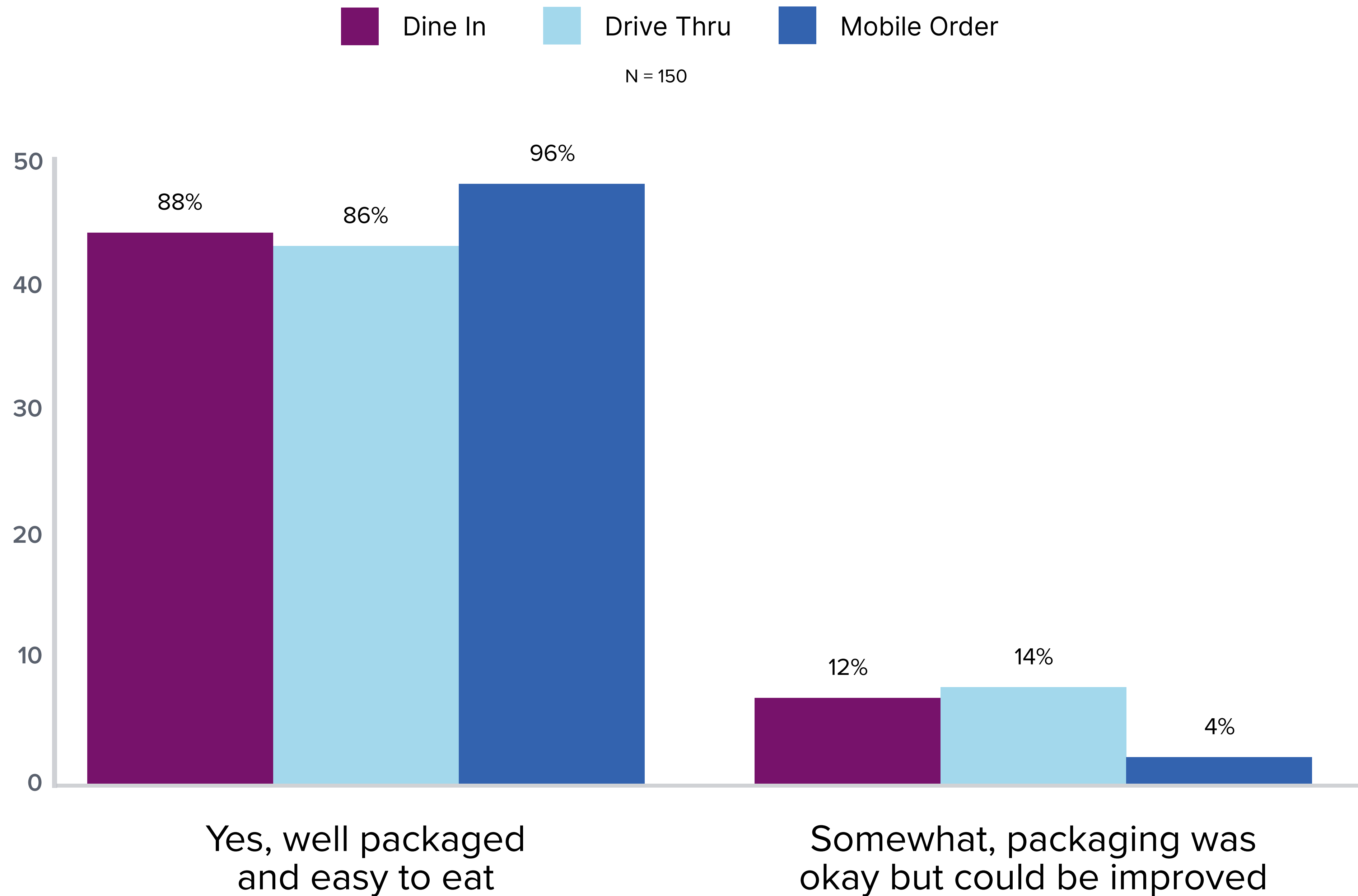
Dine In Drive Thru Mobile Order


N = 150



How well was the food packaged?

Does it increase or decrease the enjoyment of your experience?





Criteria Outlined in Part One:

*Does the audio
match the visual?*

The QSR Experience Meets Expectation

The overall finding is that **customers generally feel their experience aligns well with expectations**, with high percentages across all channels (88% dine-in, 92% drive-thru, 94% mobile order). This indicates that QSRs are largely delivering on their promises, at least in a broad sense. However, digging deeper into the "importance" of various criteria reveals nuanced priorities by channel, highlighting where the alignment is most critical.

Food quality and taste are consistently rated as highly important, with mobile order customers placing the highest emphasis at 72%. This reinforces the earlier finding that mobile ordering excels in delivering on food quality.

Location and convenience are significant drivers across all channels, with drive-thru (74%) and mobile order (78%) customers rating it as most important. This aligns perfectly with the inherent nature of these channels, which are built on speed and ease of access.

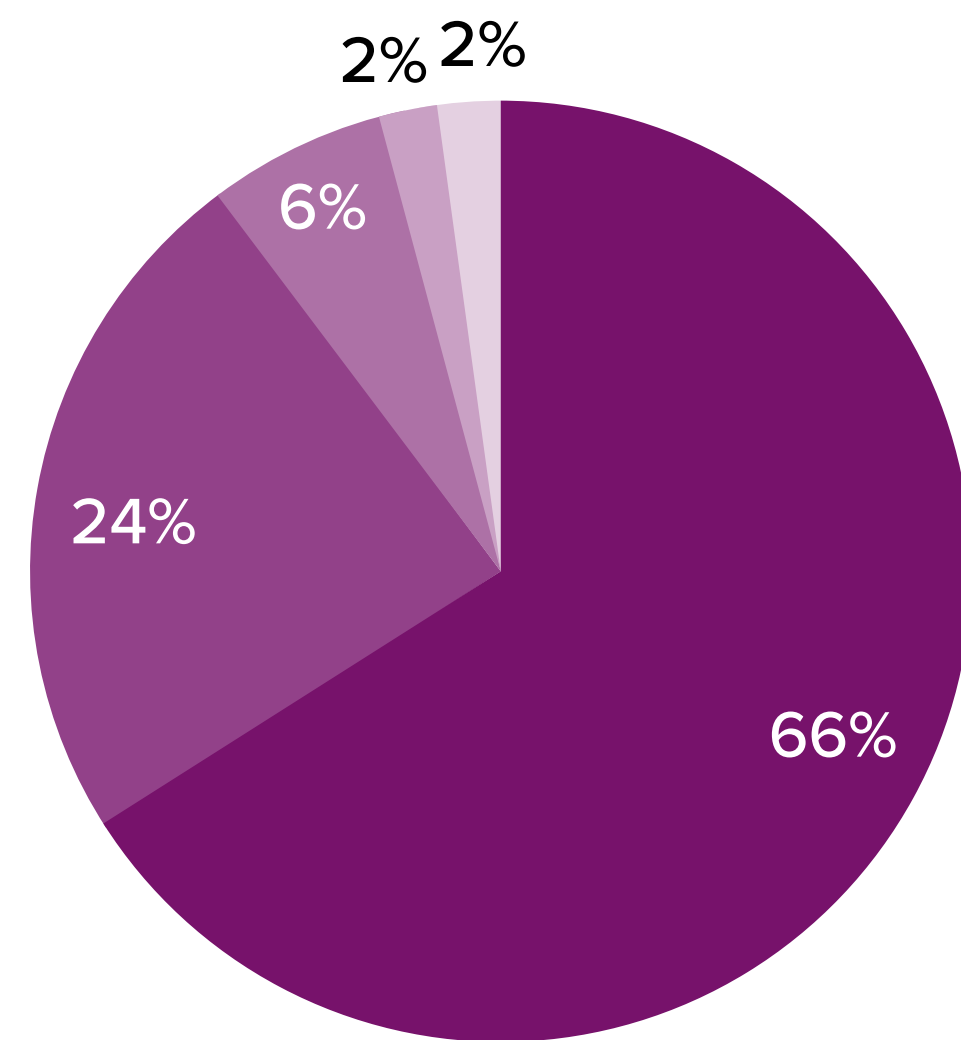
Value for the money is notably more important for mobile order customers (60%) compared to dine-in (42%) and drive-thru (44%). This suggests that mobile order users are often more price-conscious or are making deliberate, budget-friendly choices.

Loyalty programs and promotions show a significant jump in importance for mobile order customers (56%) compared to dine-in (38%) and drive-thru (34%). This directly correlates with the higher loyalty app usage in the mobile order channel.

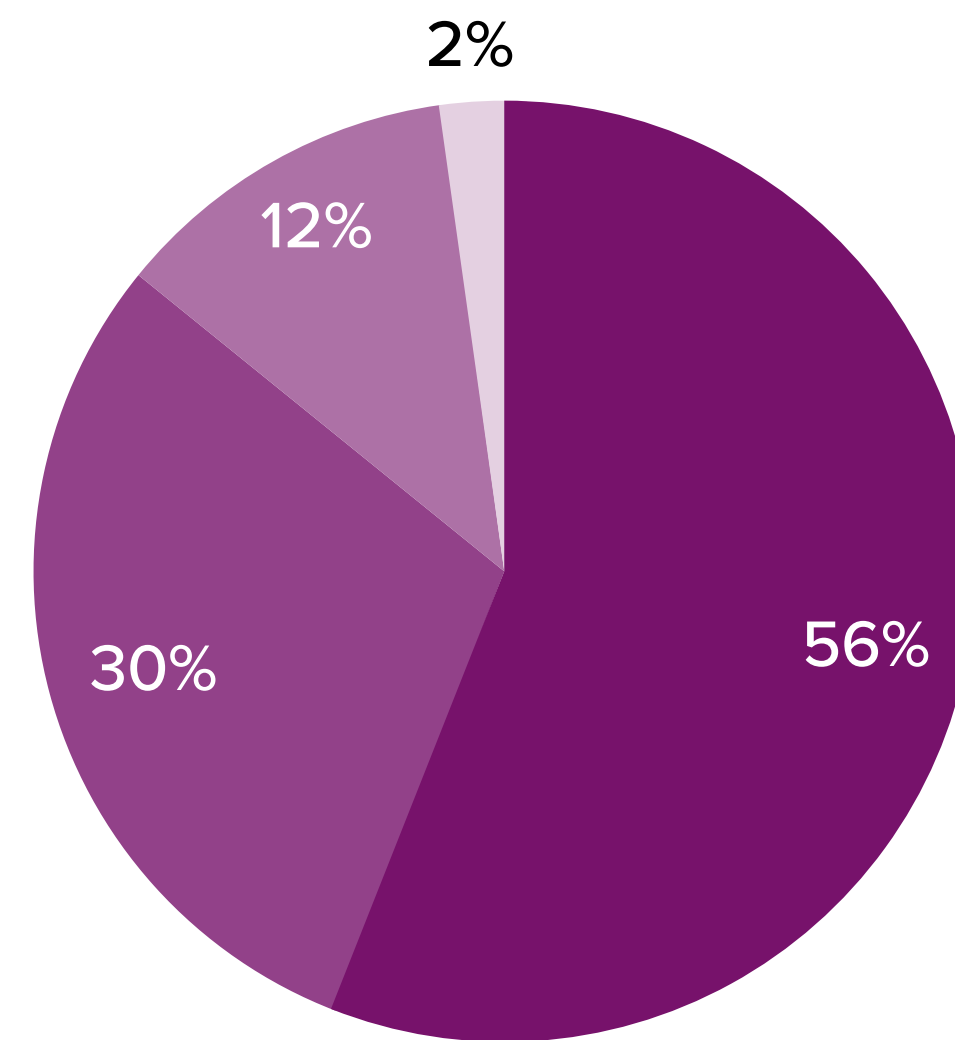
Finally, customer service is highly important across all channels (62% dine-in, 64% drive-thru, 72% mobile order), but its definition shifts. As discussed, for mobile order, it's about the seamless digital journey, while for dine-in and drive-thru, it still includes human interaction.

The "audio" (customer expectations) and "visual" (actual experience) align most strongly for mobile order in terms of food quality and convenience, and for dine-in in terms of service if considering direct staff interaction.

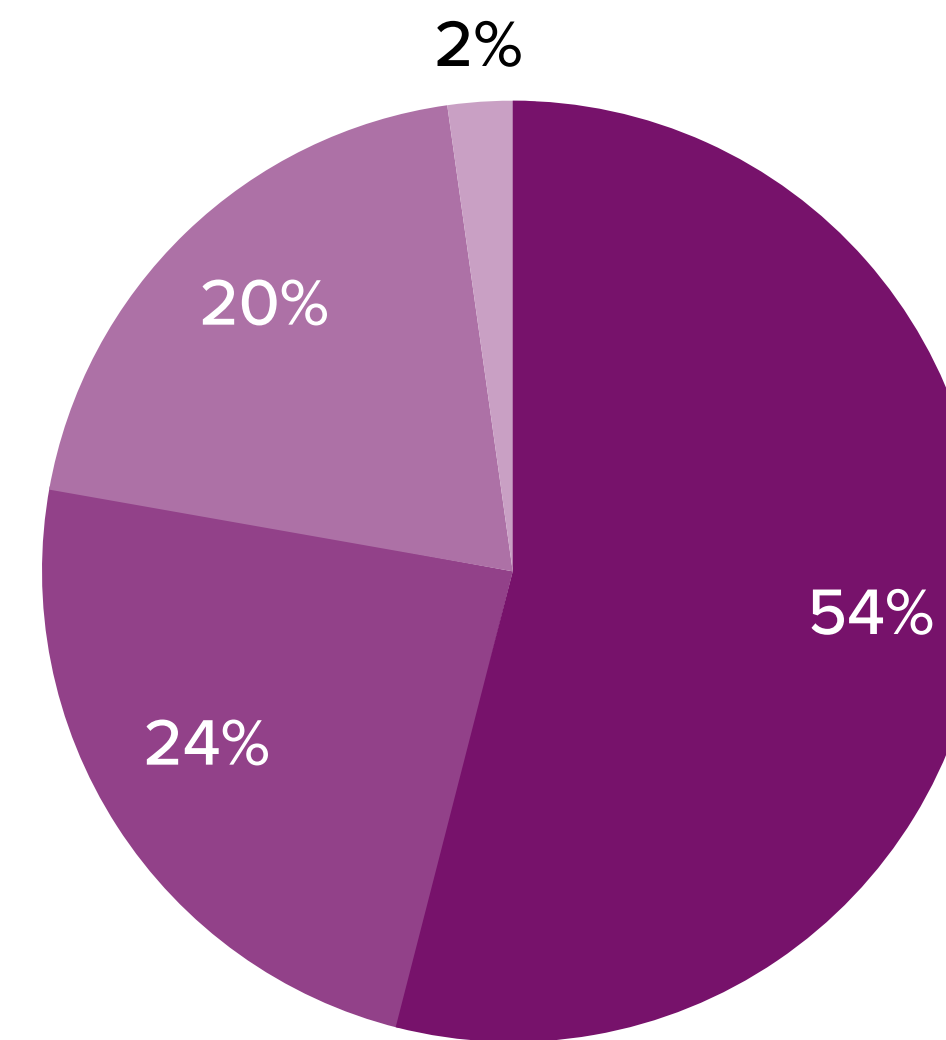
Quality of food and taste



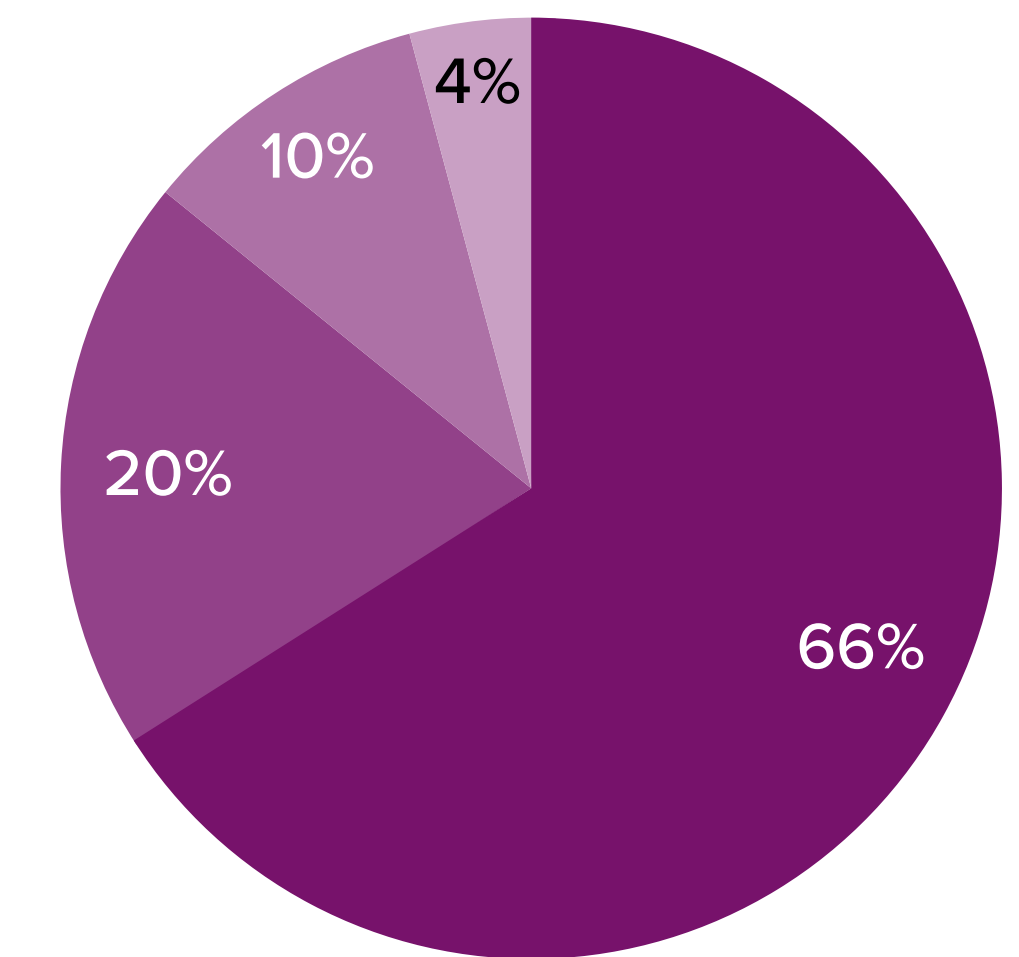
Range of food options



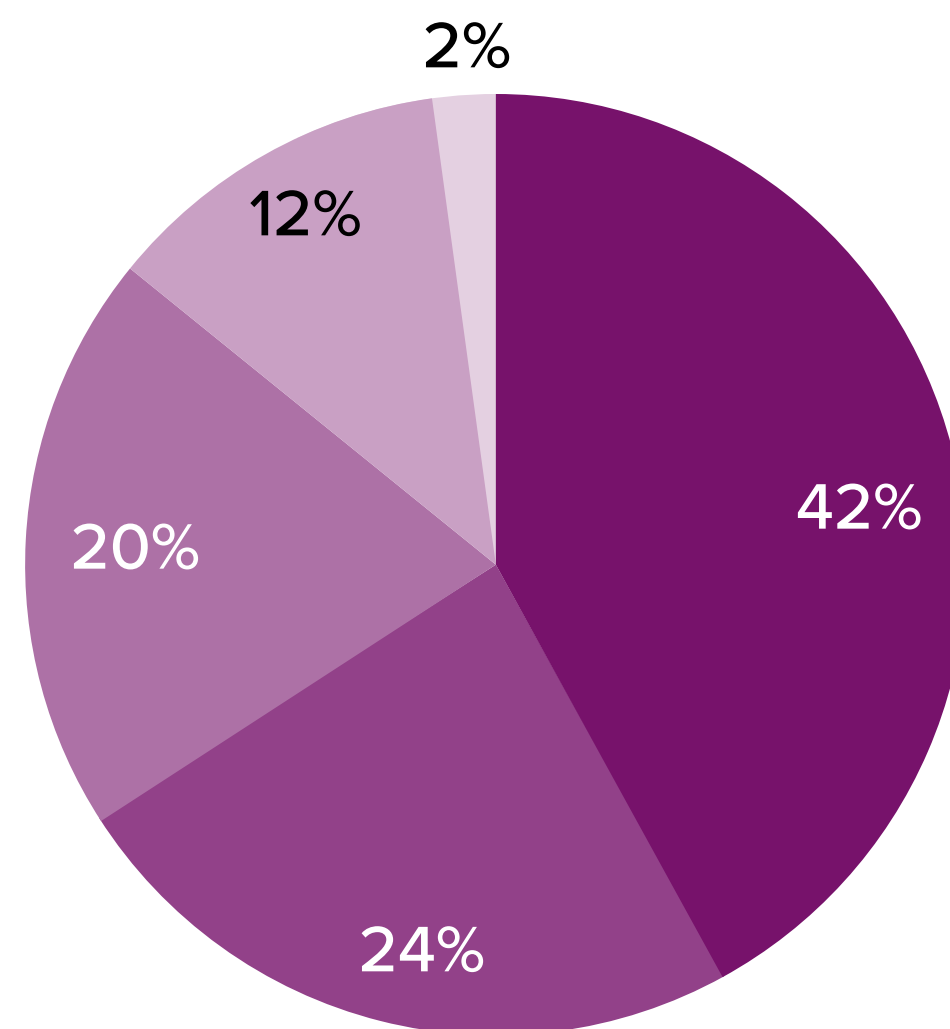
Range of drink options



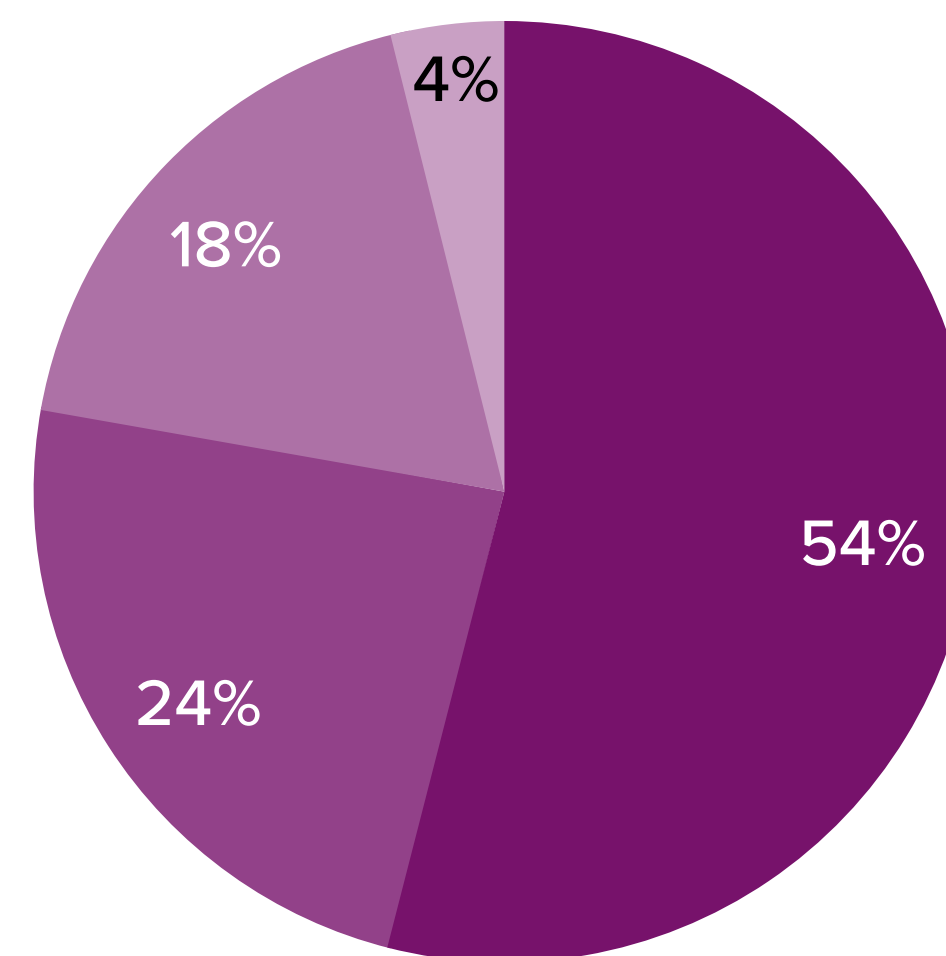
Location and convenience



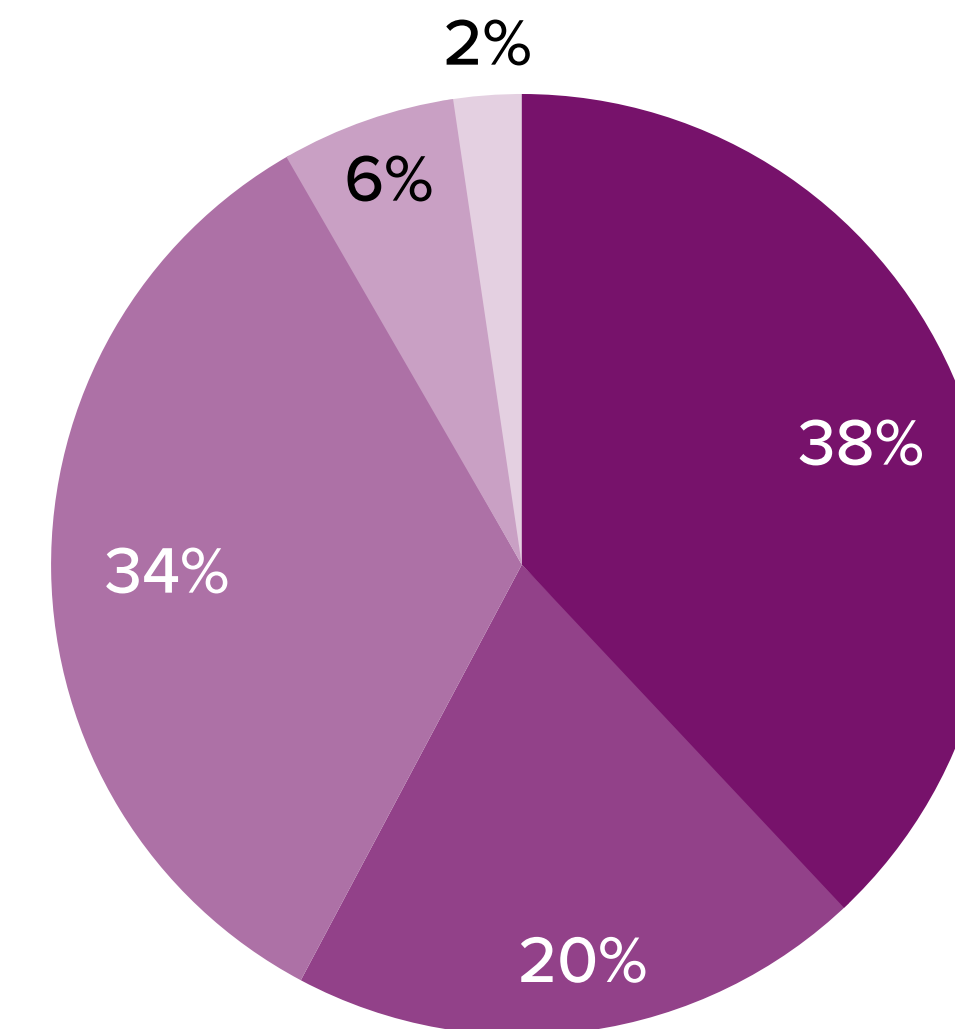
Value for the money



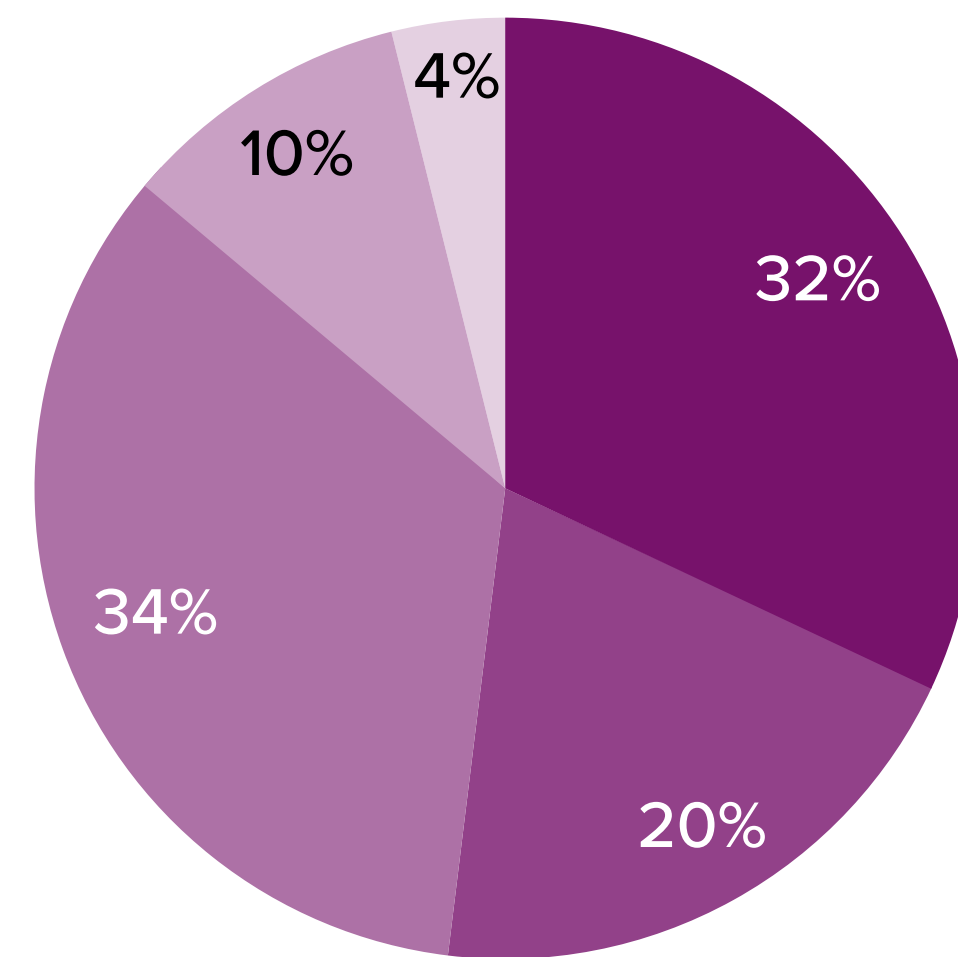
Food quality consistency



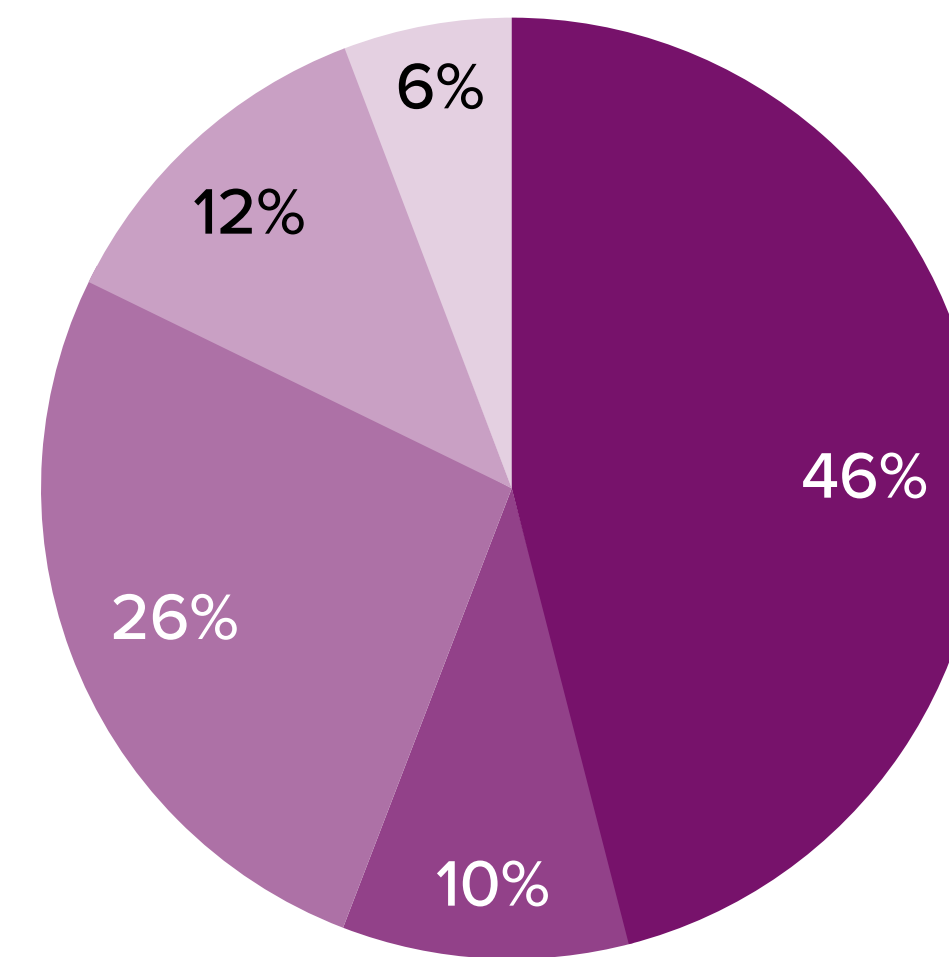
Loyalty programs and promotions



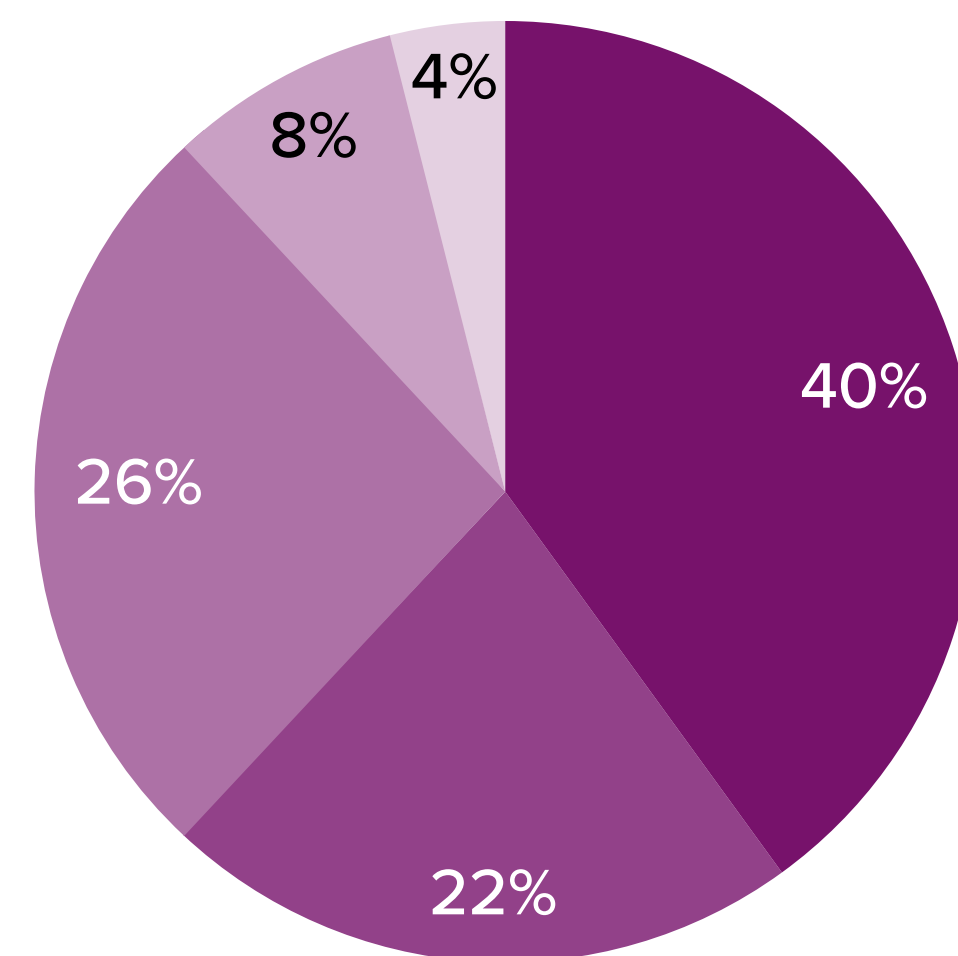
Healthy and/or diet-friendly
food options



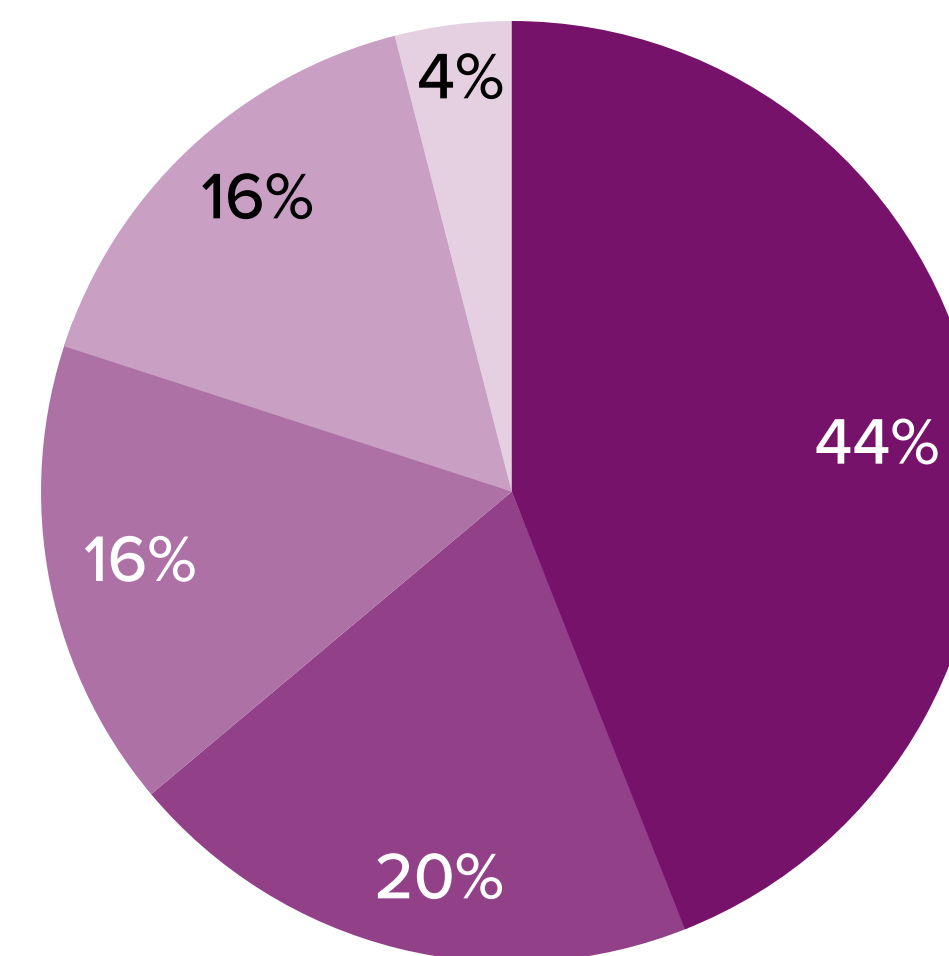
Healthy and/or diet-friendly
drink options

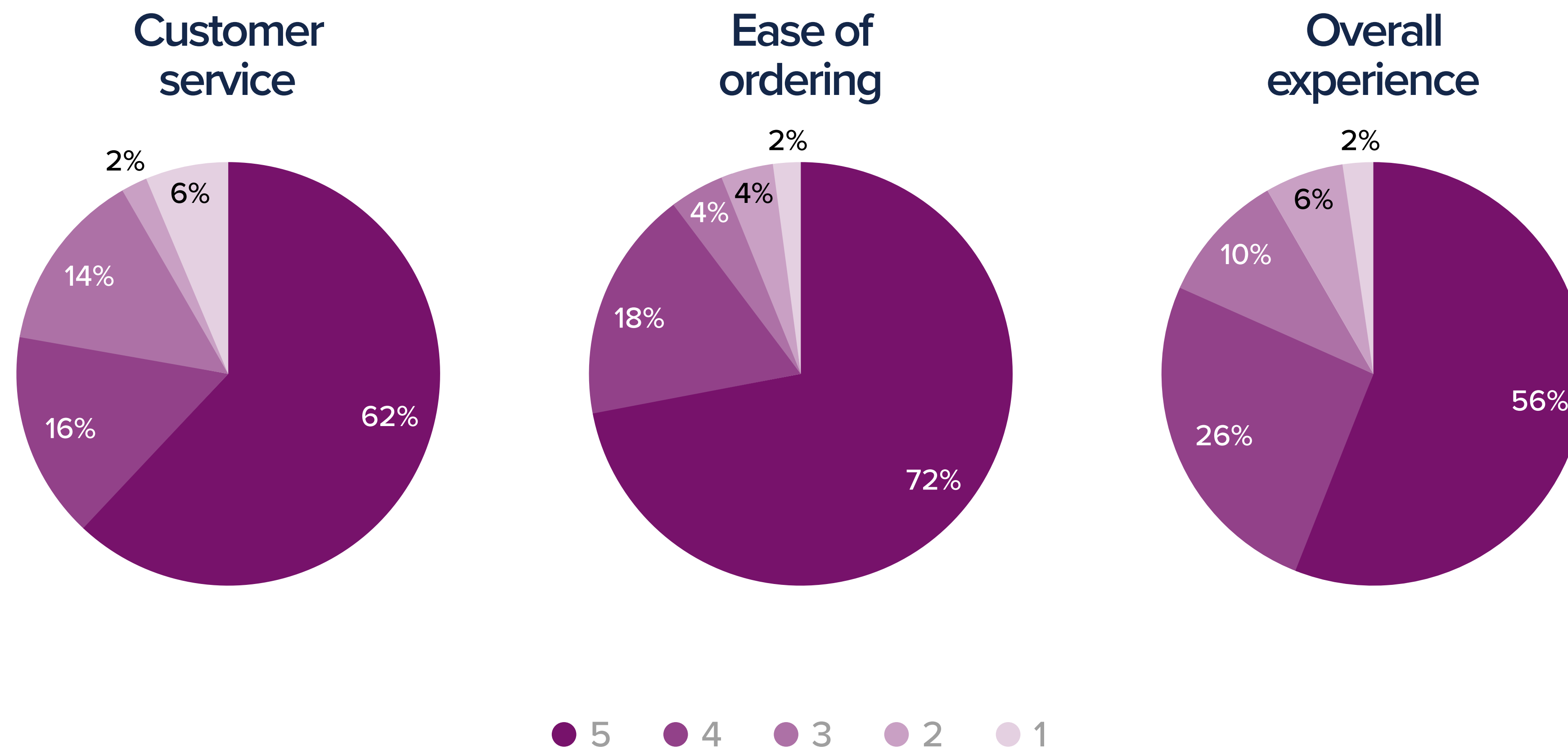


Choice of full sugar, no sugar,
and low calorie drinks

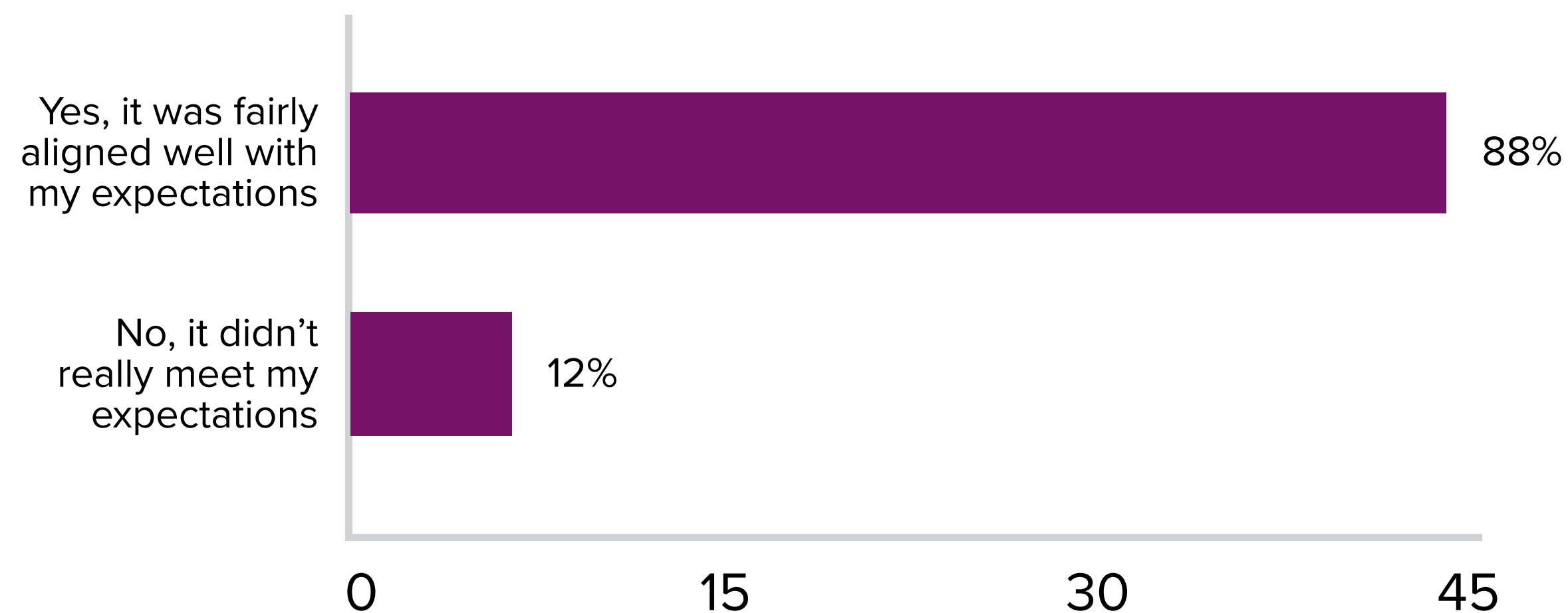


Clear communication on
product ingredients and calories



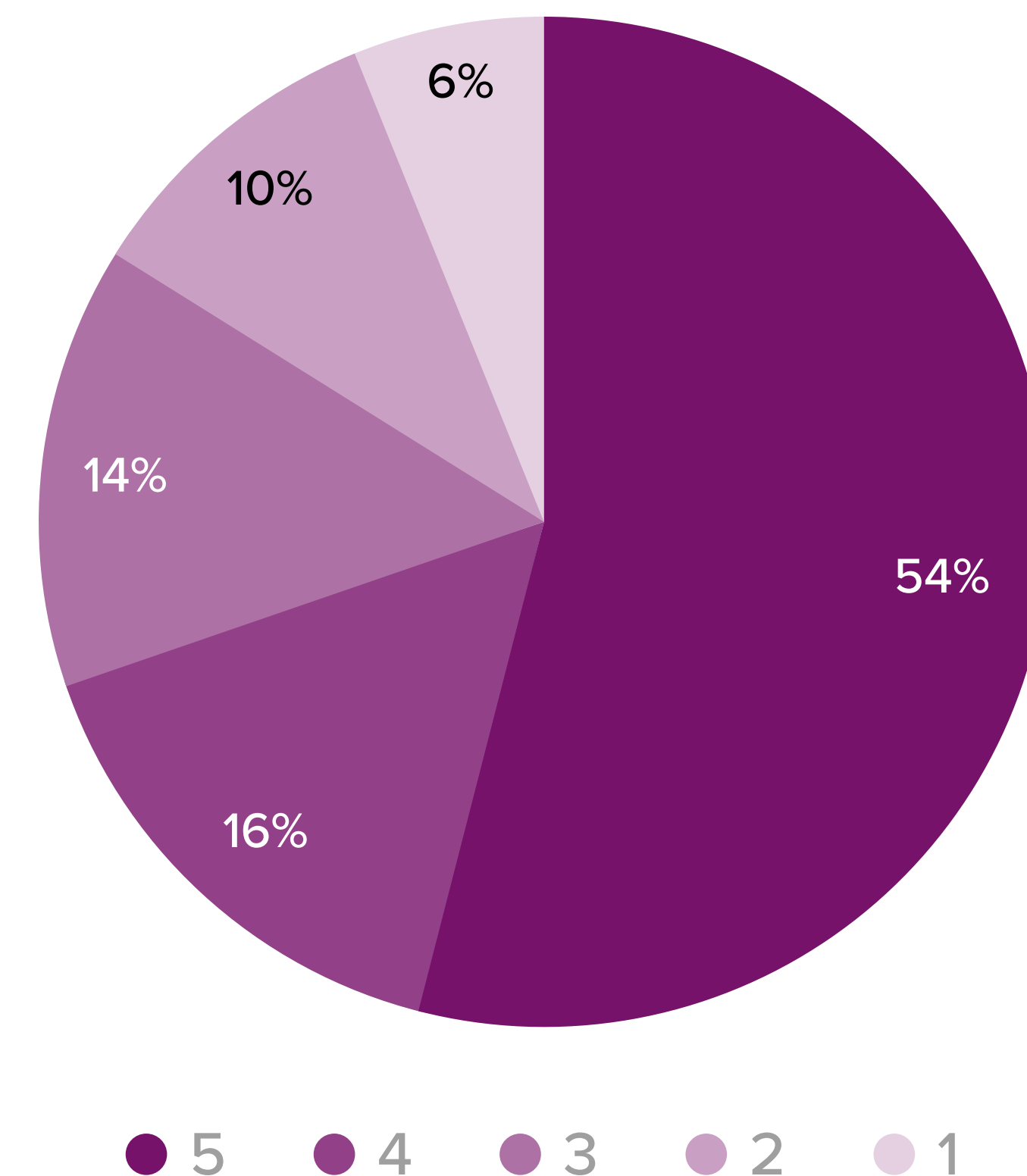


Did this experience align with what you said was important?

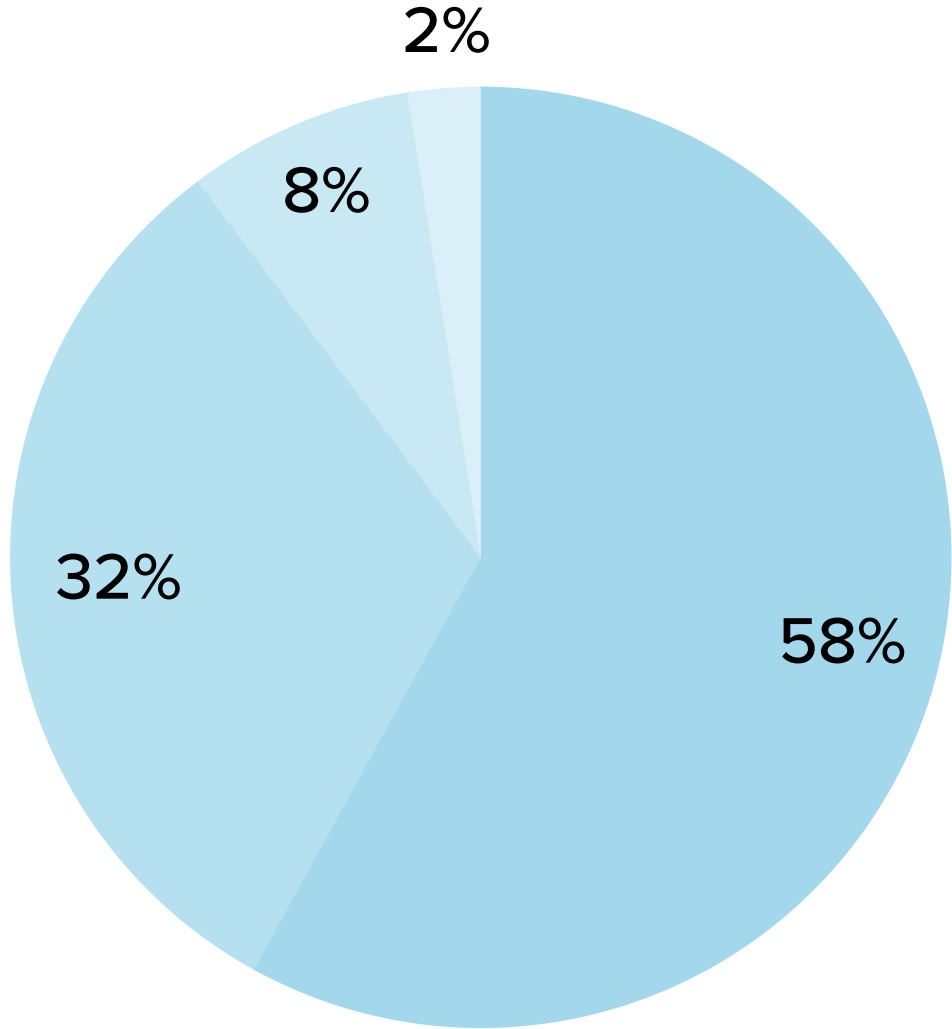


Based on this experience, how likely are you to return to this restaurant's dine-in establishment in the near future?

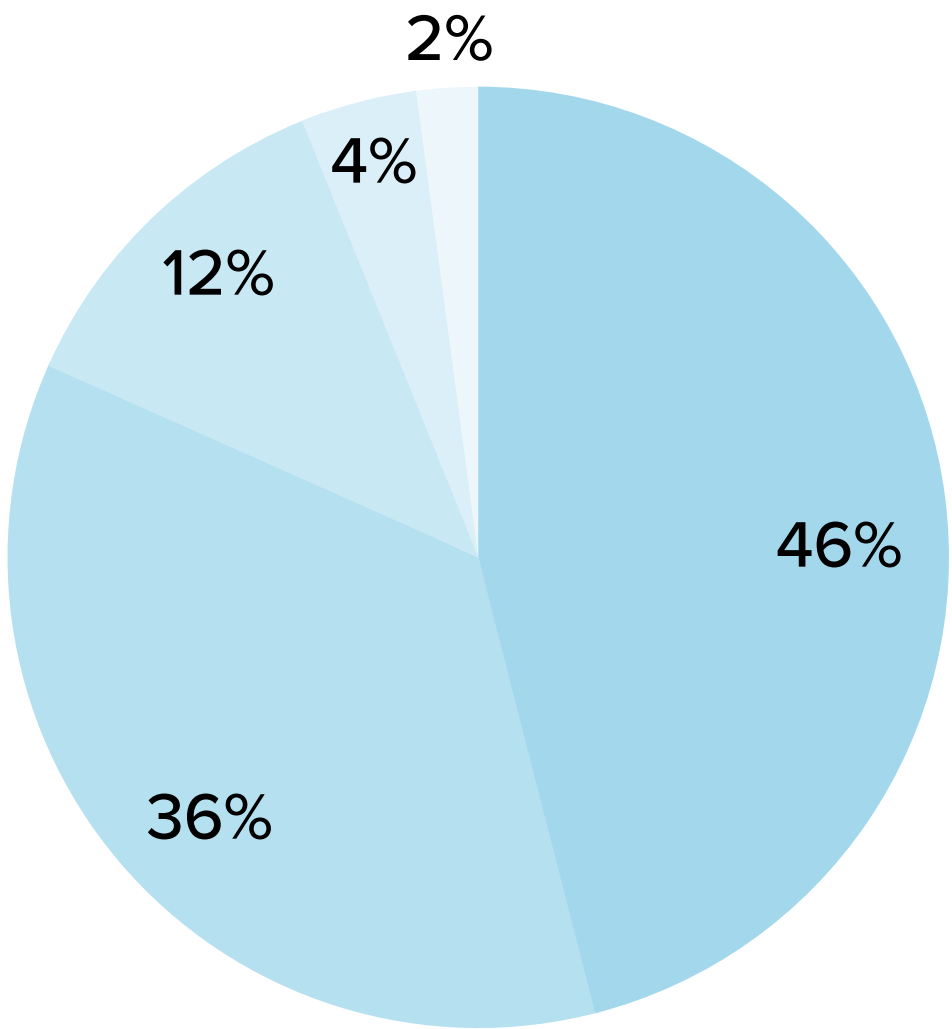
Scale from 1 (very unlikely) to 5 (very likely).



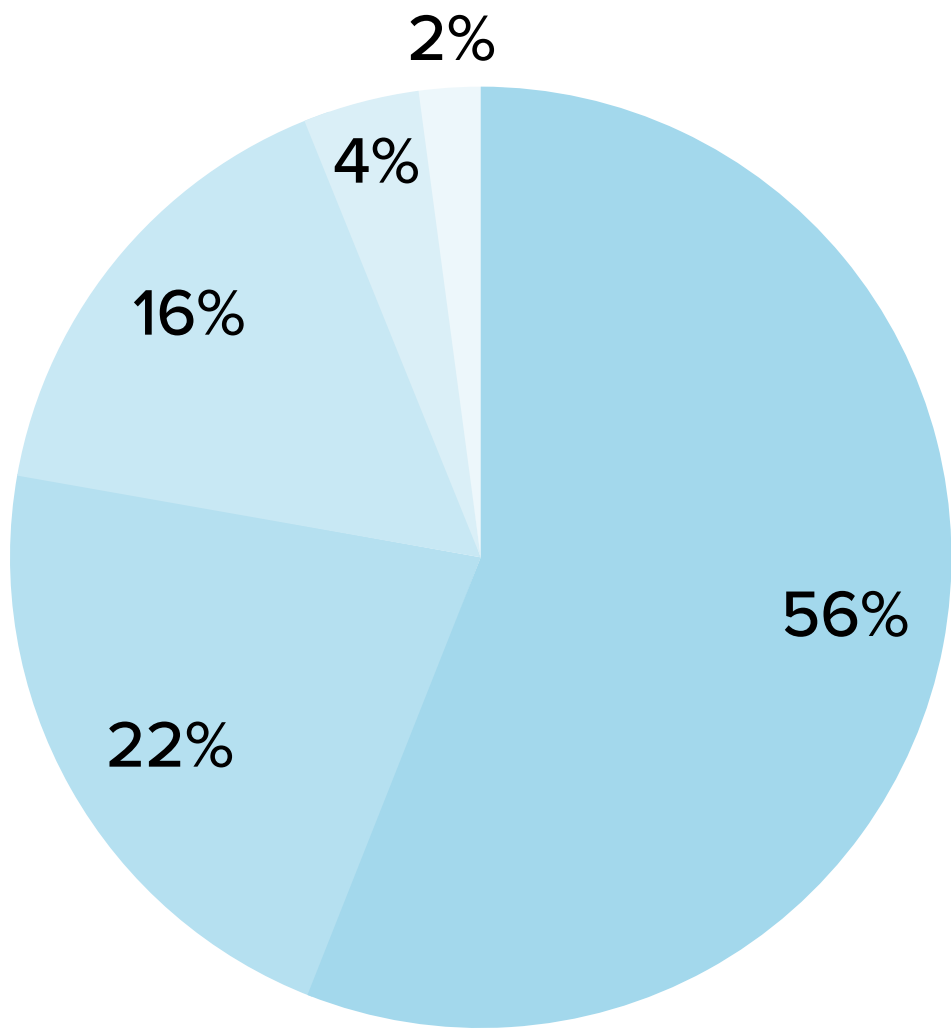
Quality of food and taste



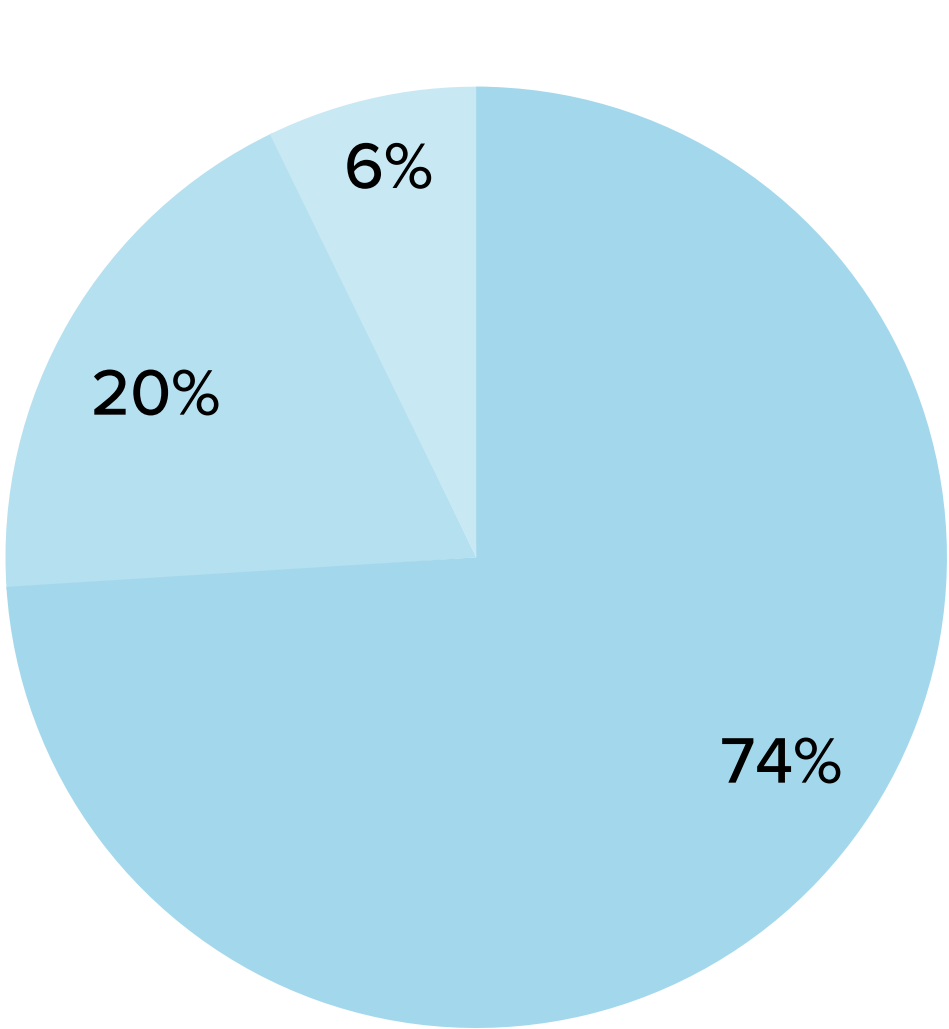
Range of food options



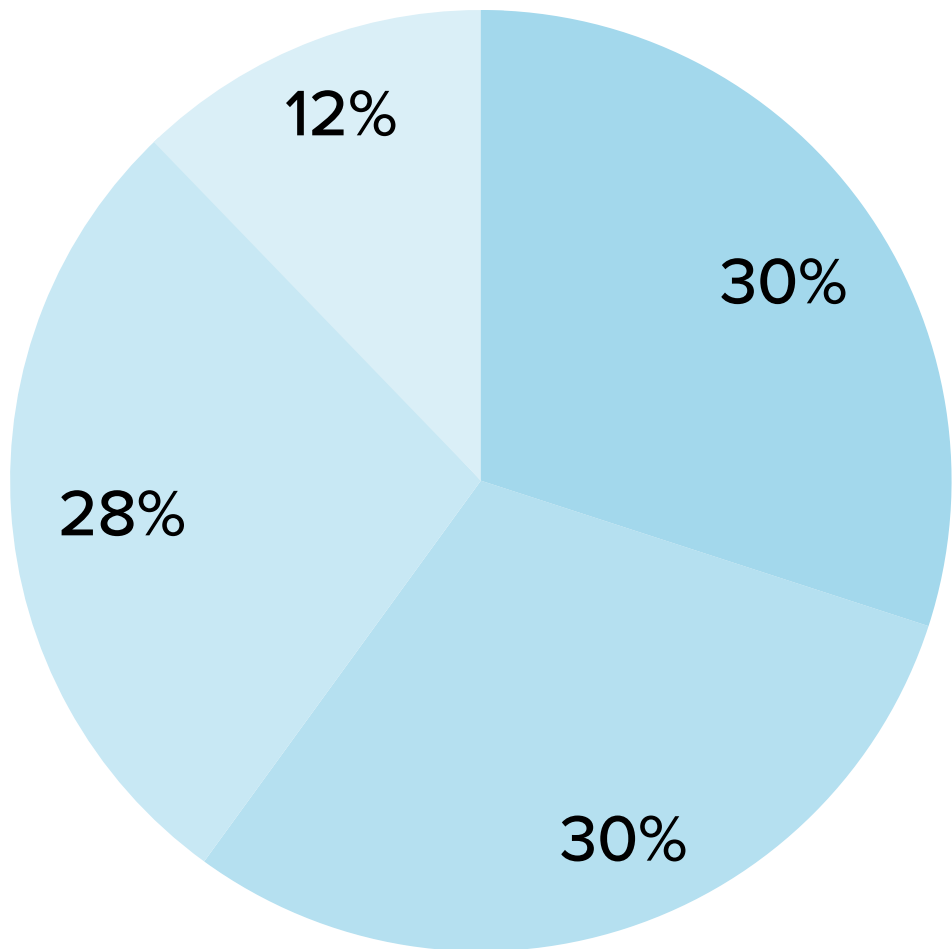
Range of drink options



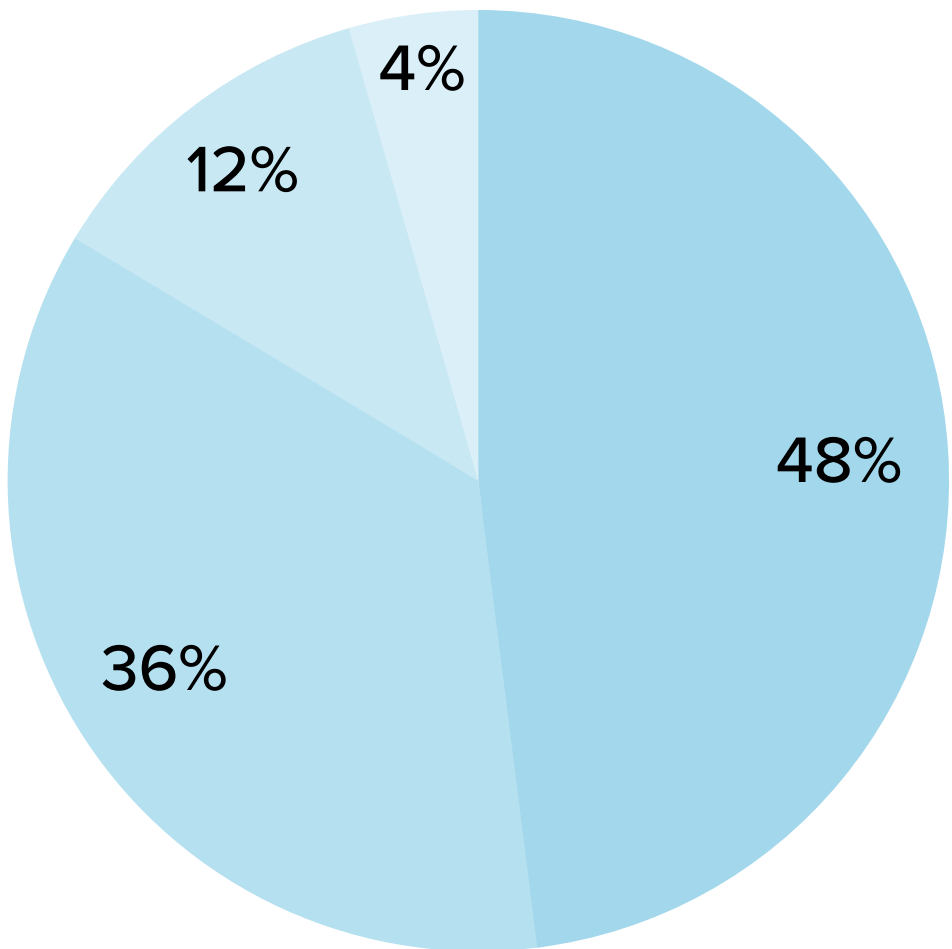
Location and convenience



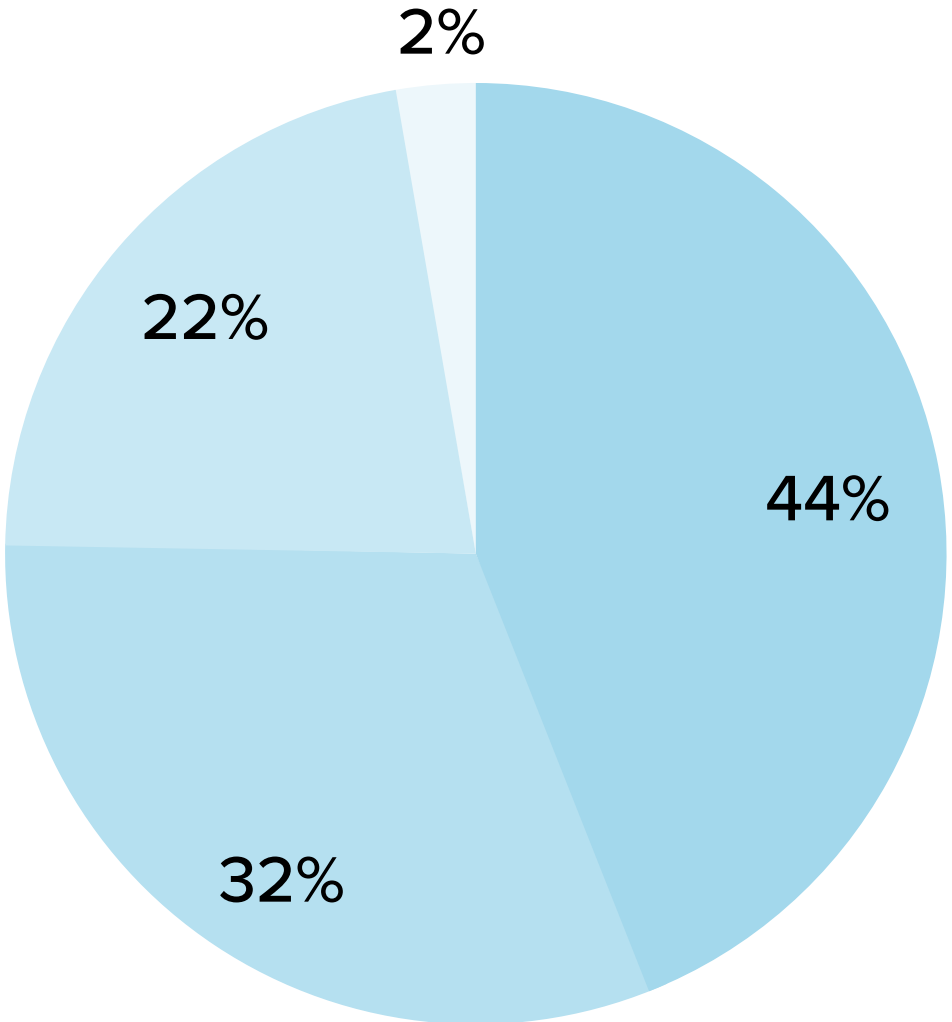
Value for the money



Food quality consistency

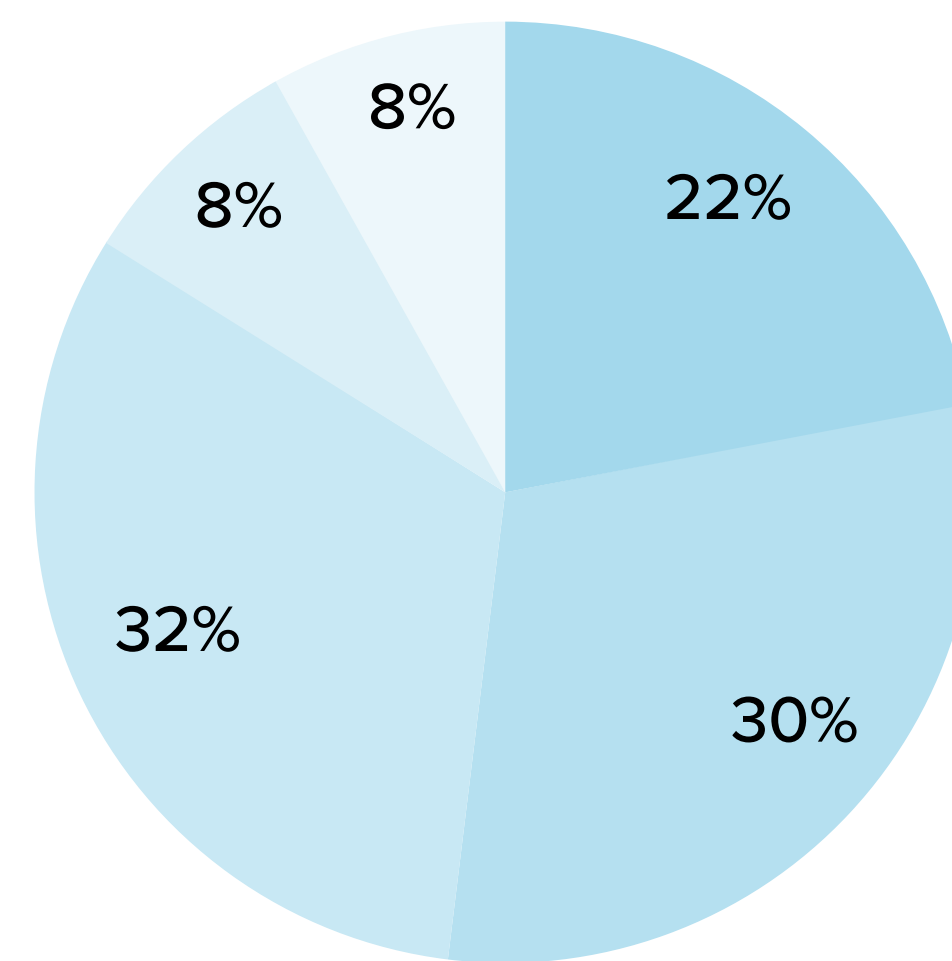


Loyalty programs and promotions

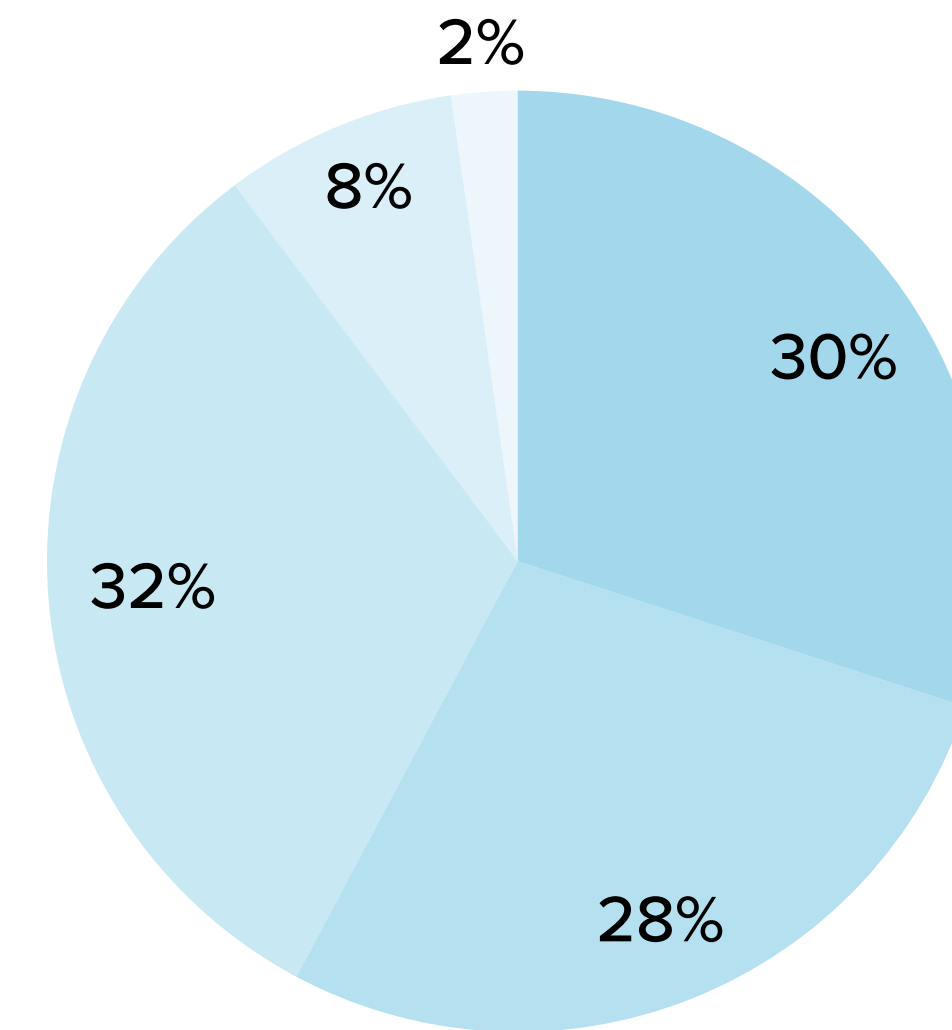


● 5 ● 4 ● 3 ● 2 ● 1

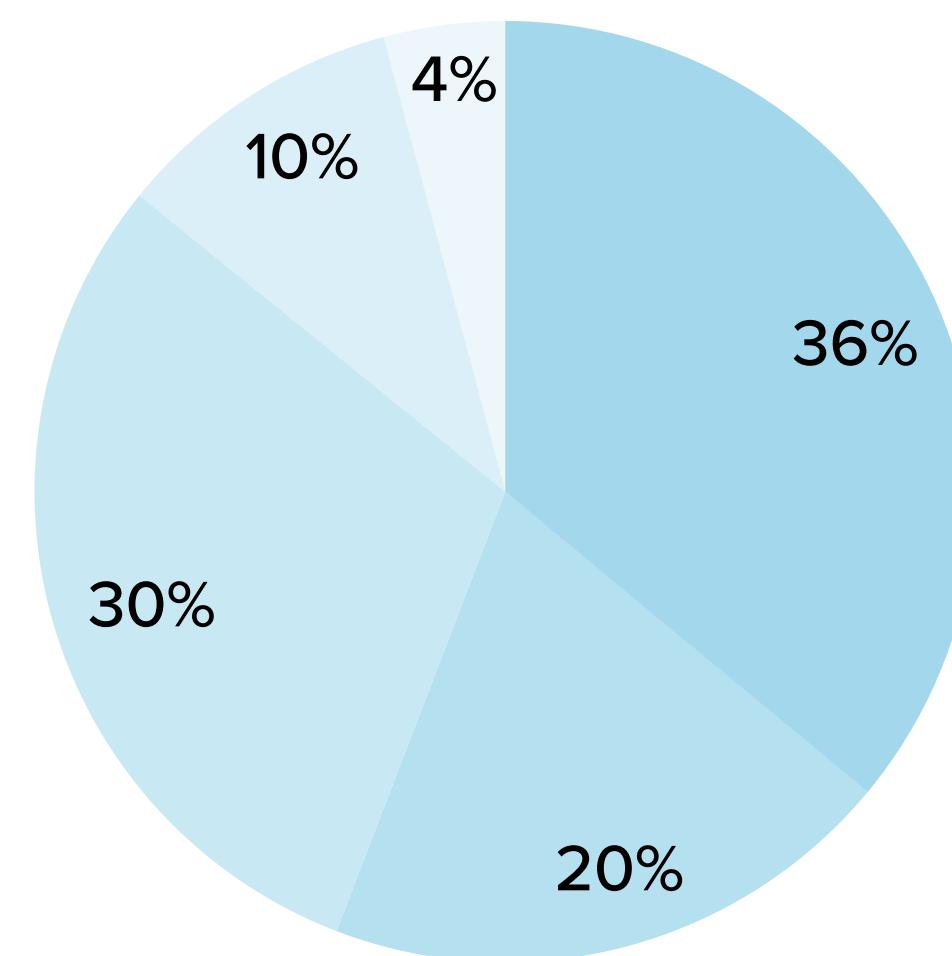
Healthy and/or diet-friendly
food options



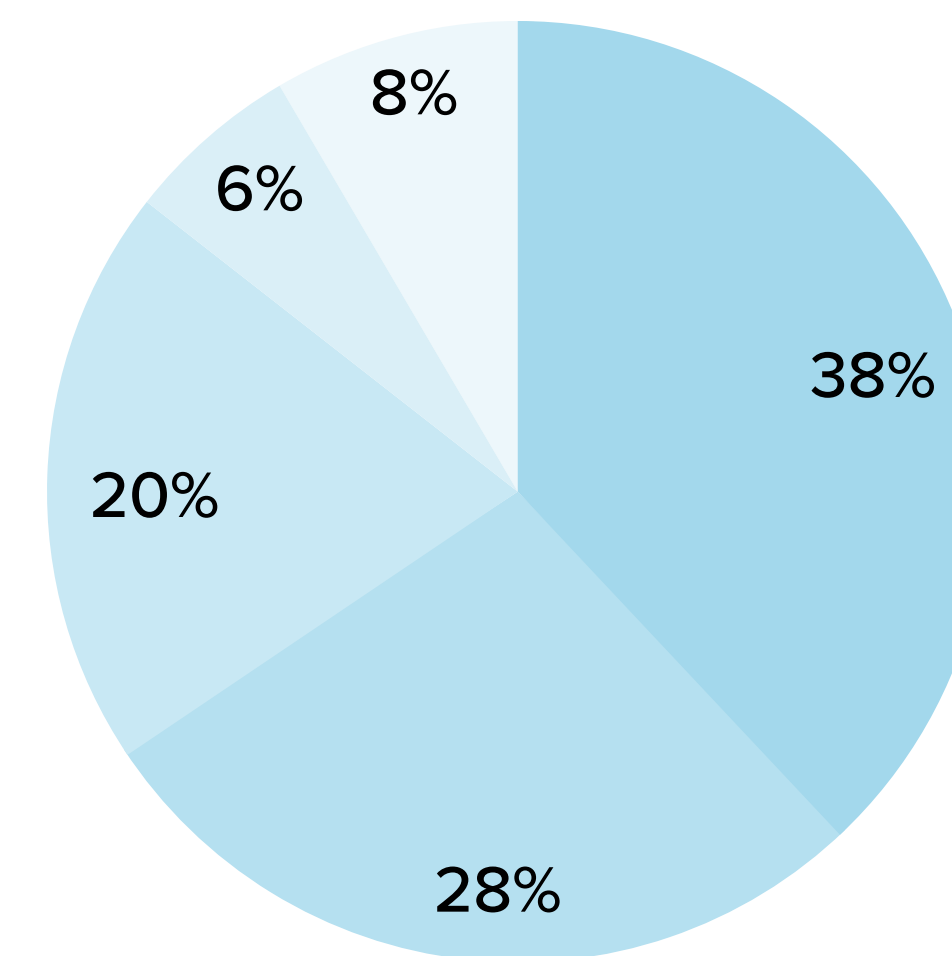
Healthy and/or diet-friendly
drink options



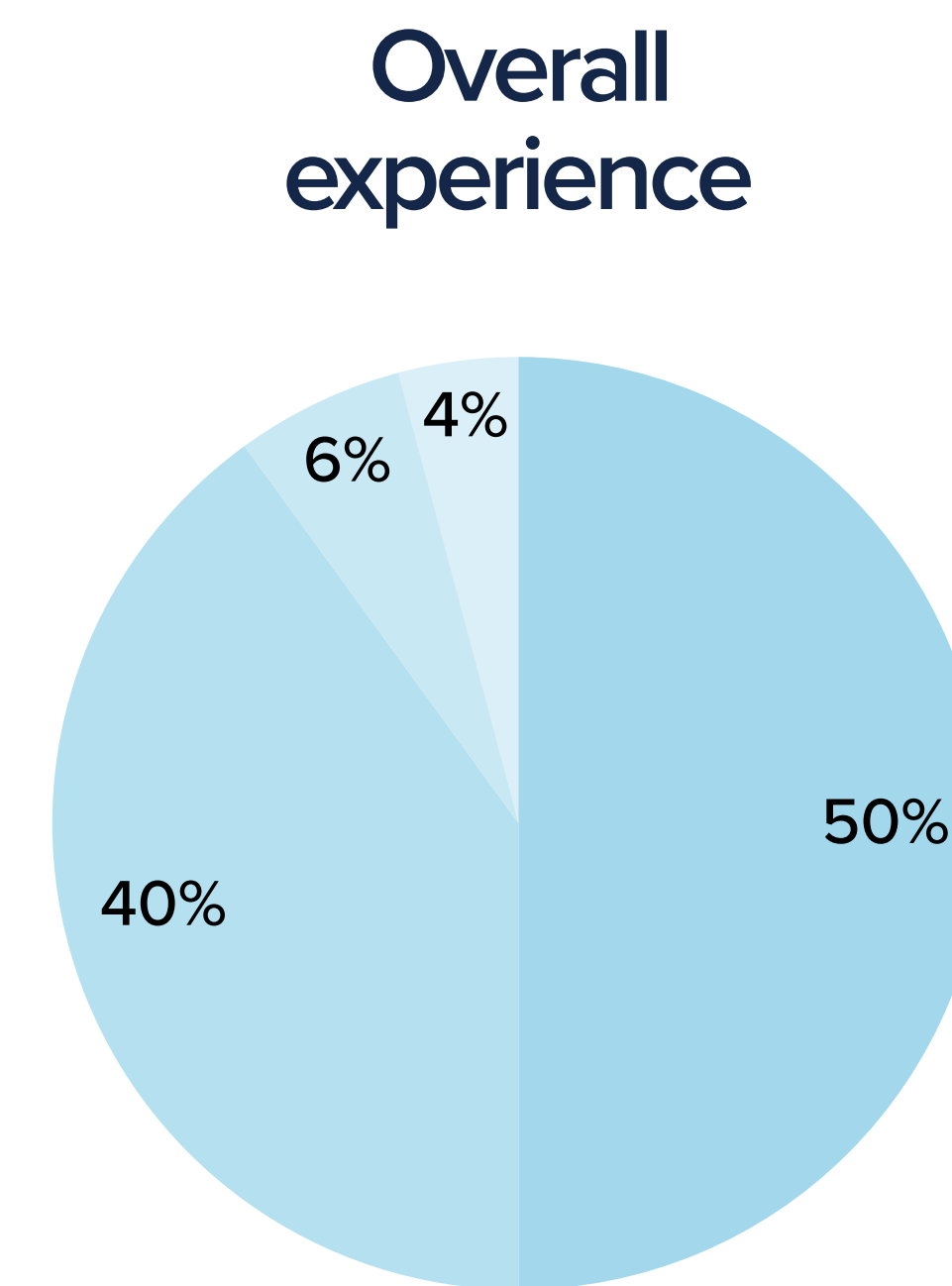
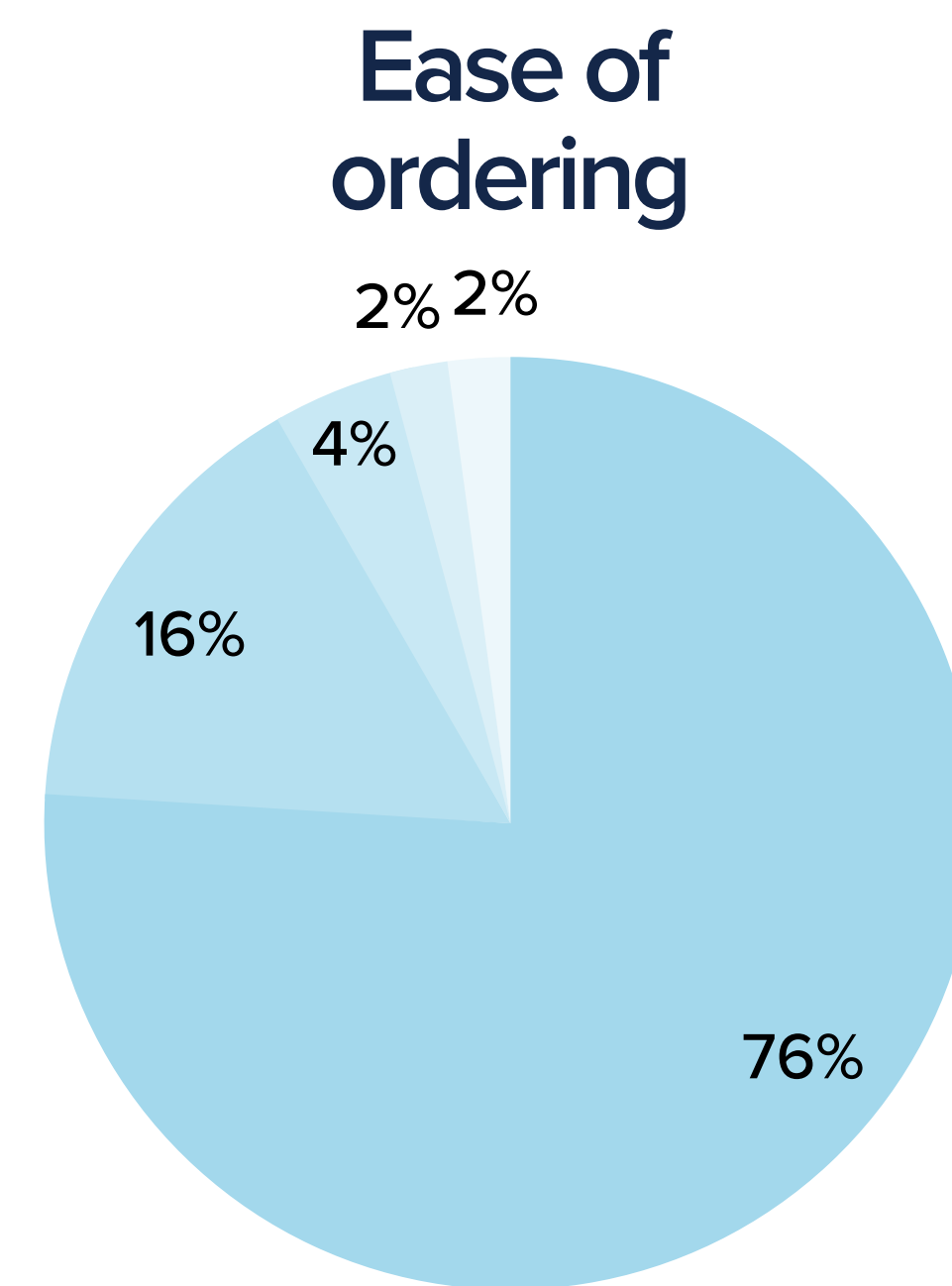
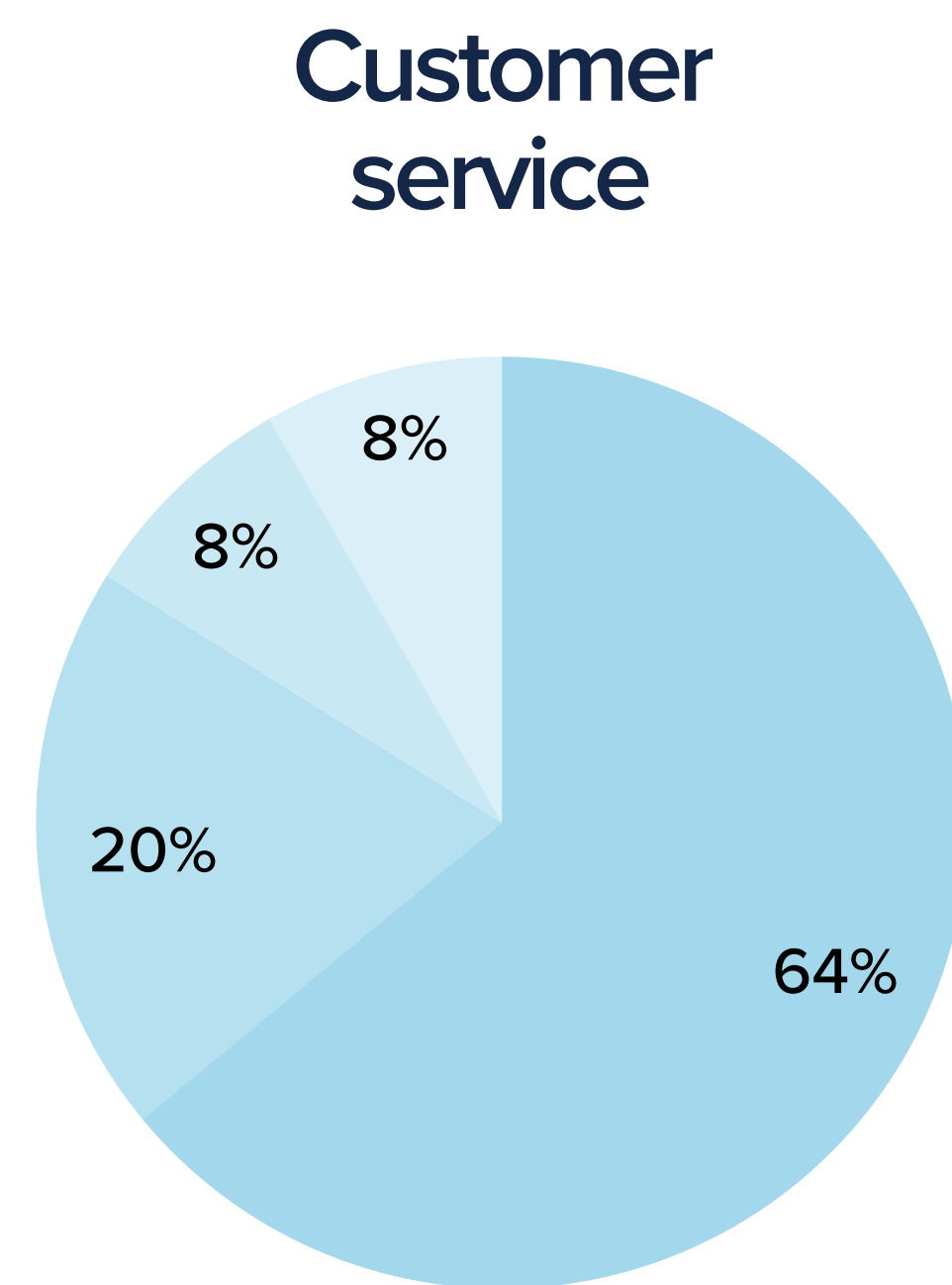
Choice of full sugar, no sugar,
and low calorie drinks



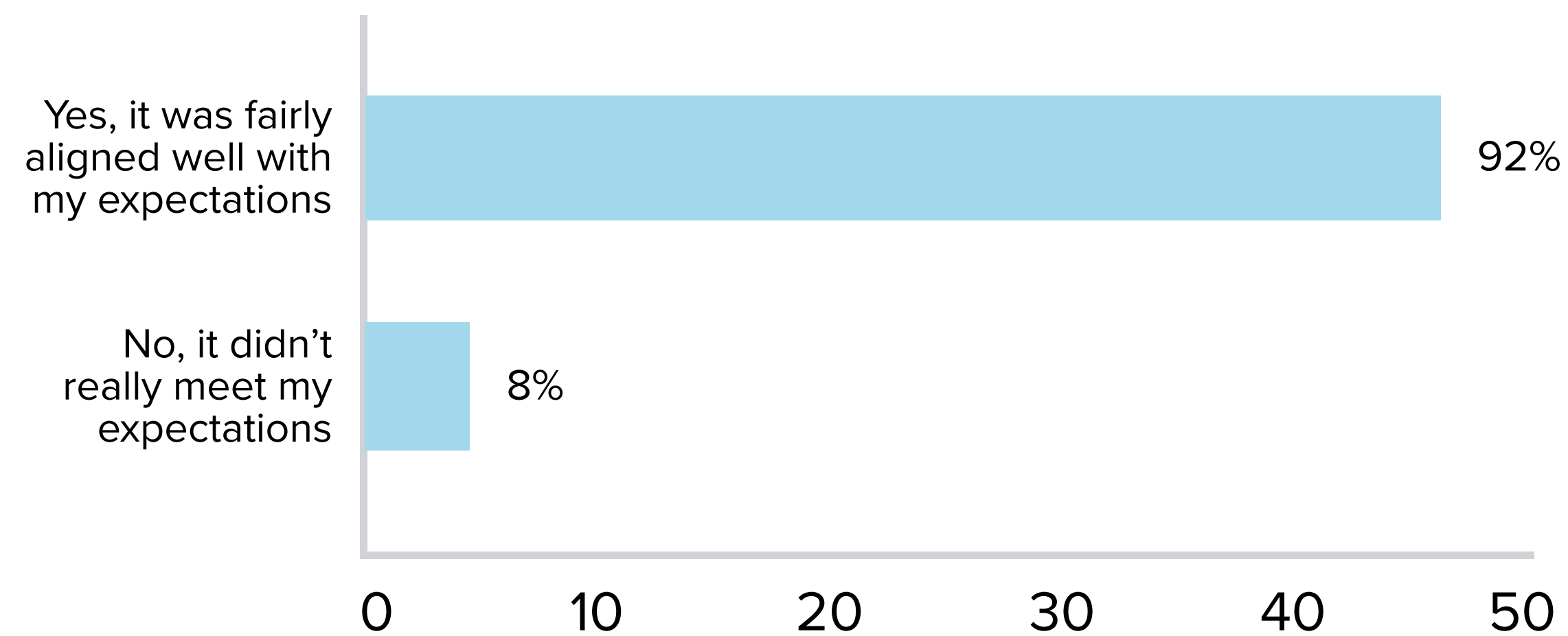
Clear communication on
product ingredients and calories



● 5 ● 4 ● 3 ● 2 ● 1

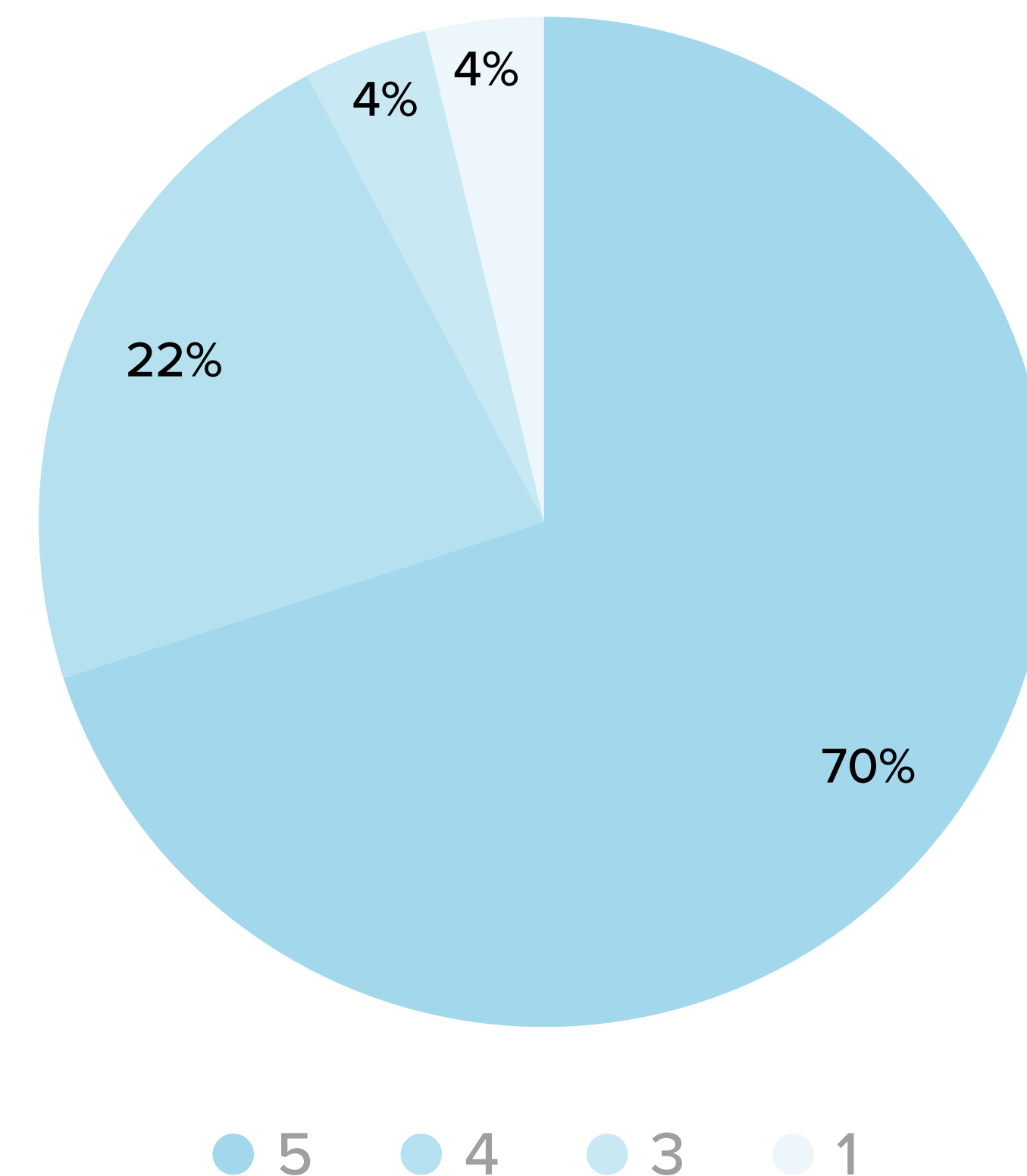


Did this experience align with what you said was important?

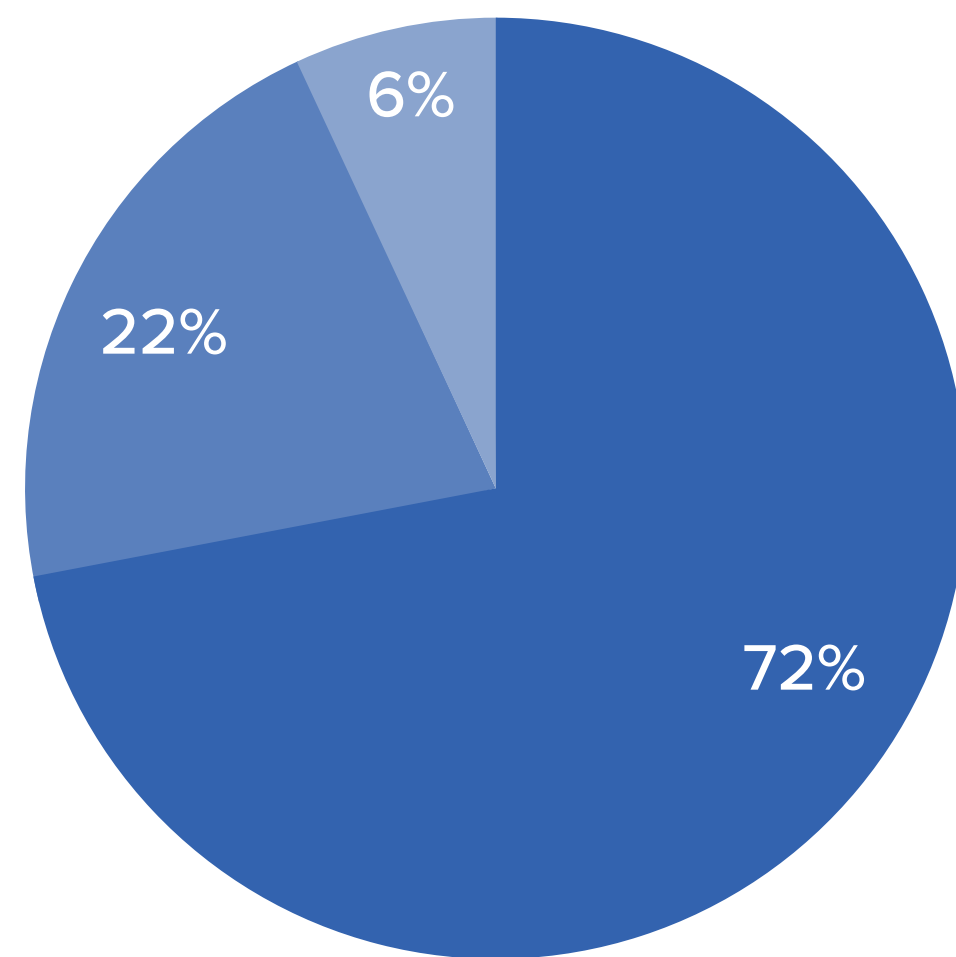


Based on this experience, how likely are you to return to this restaurant's drive-thru in the near future?

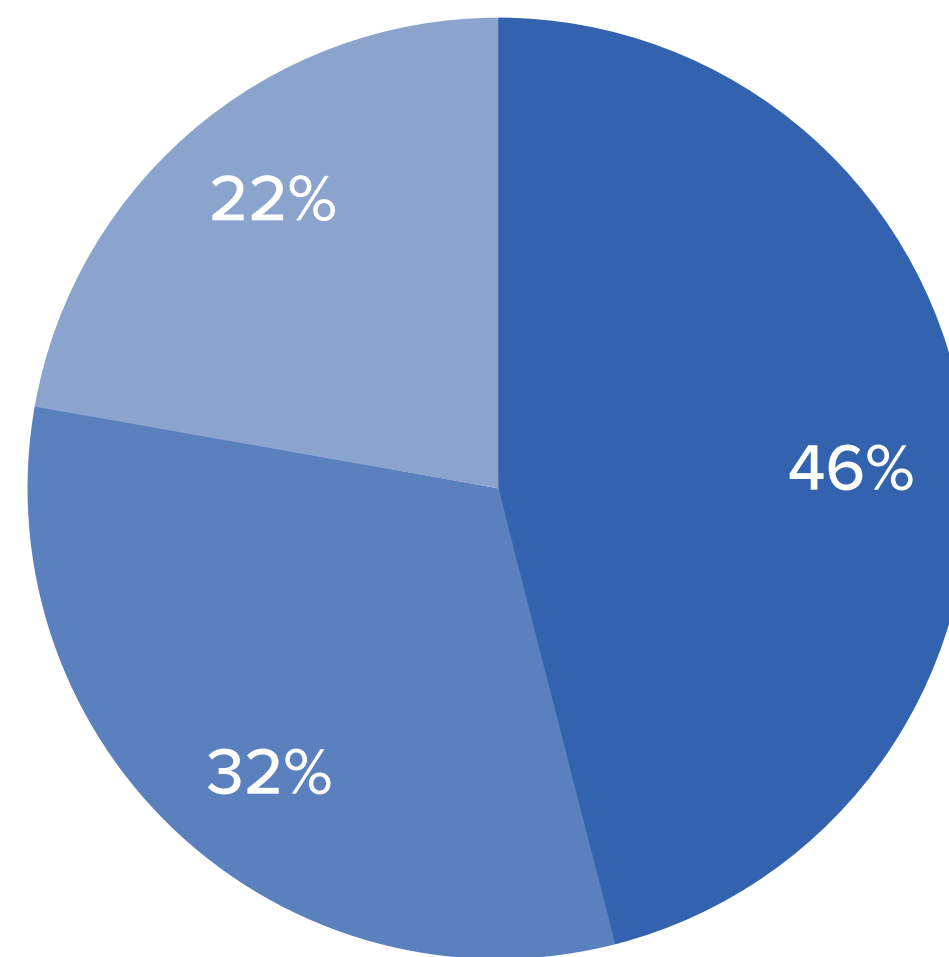
Scale from 1 (very unlikely) to 5 (very likely).



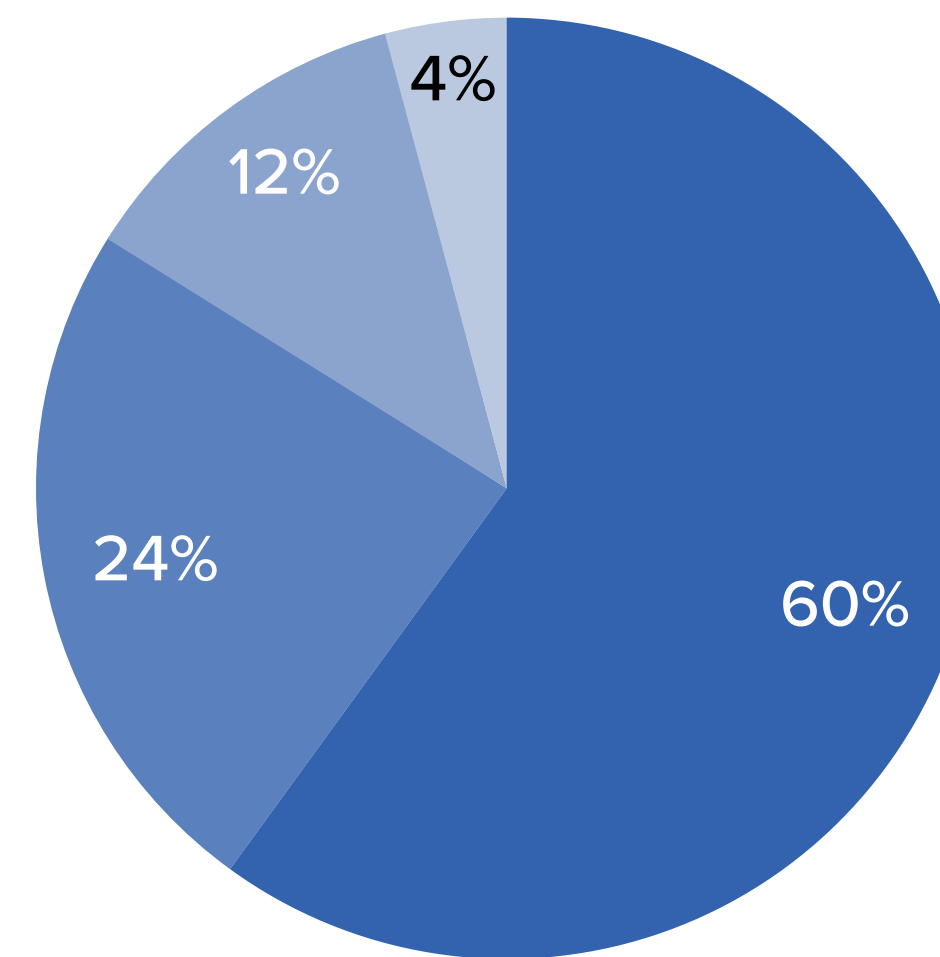
Quality of food
and taste



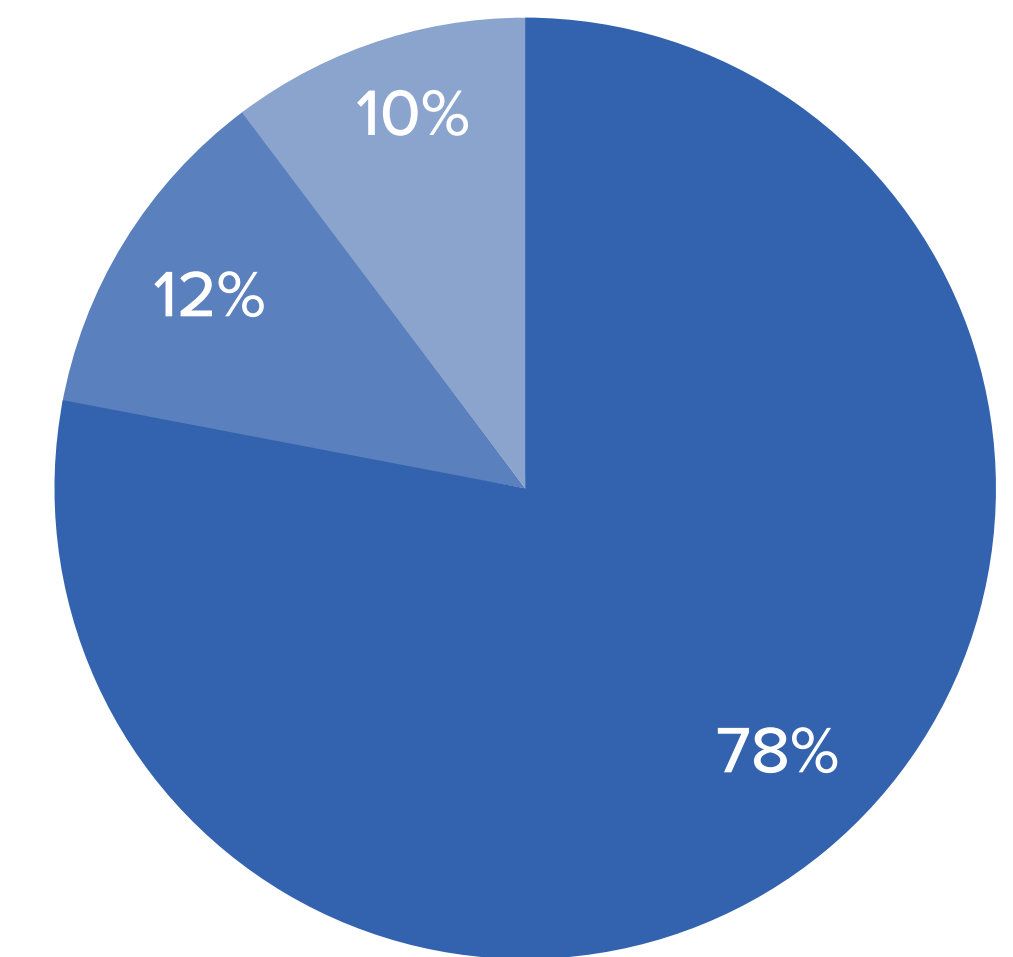
Range of
food options



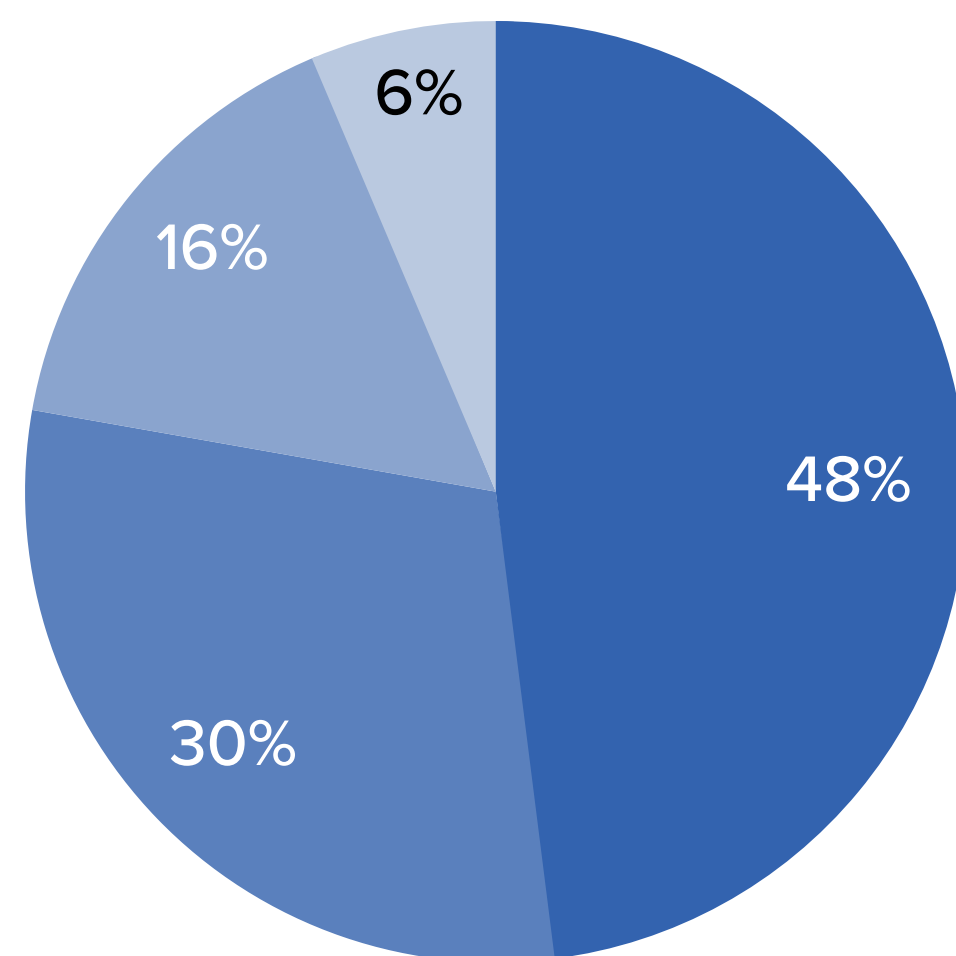
Range of
drink options



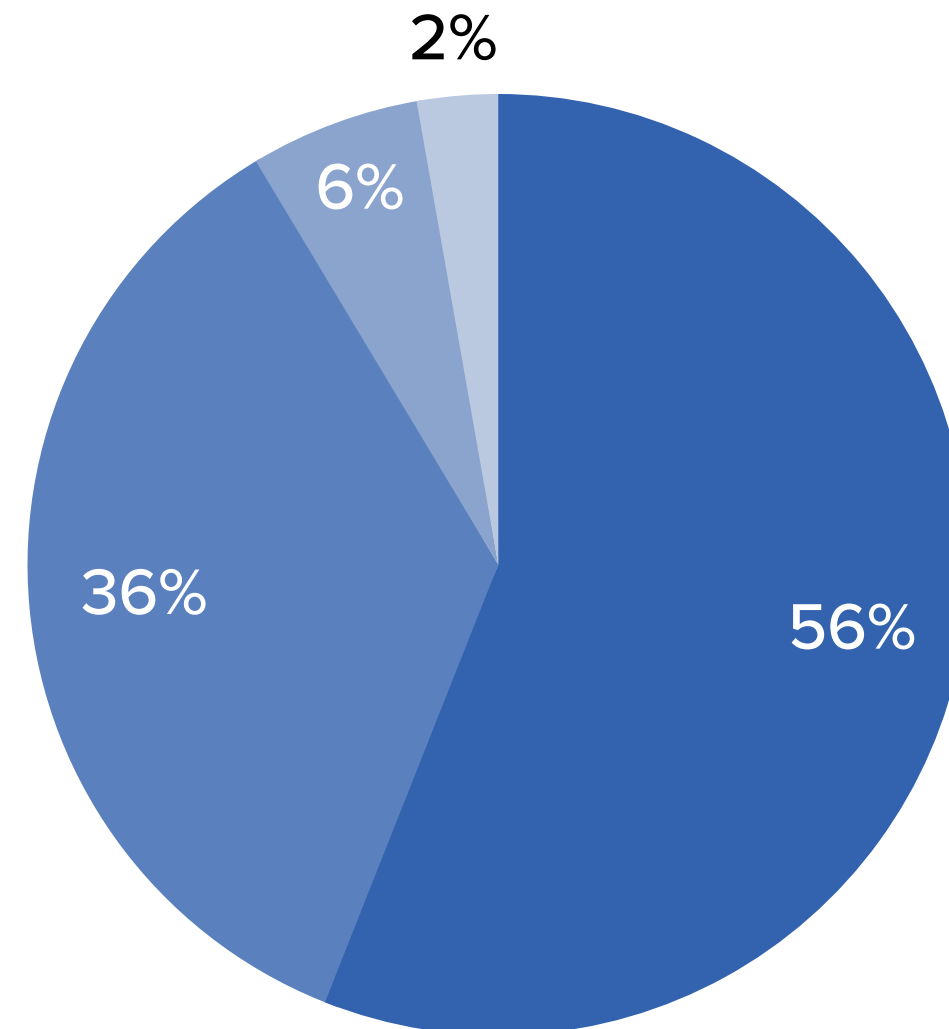
Location and
convenience



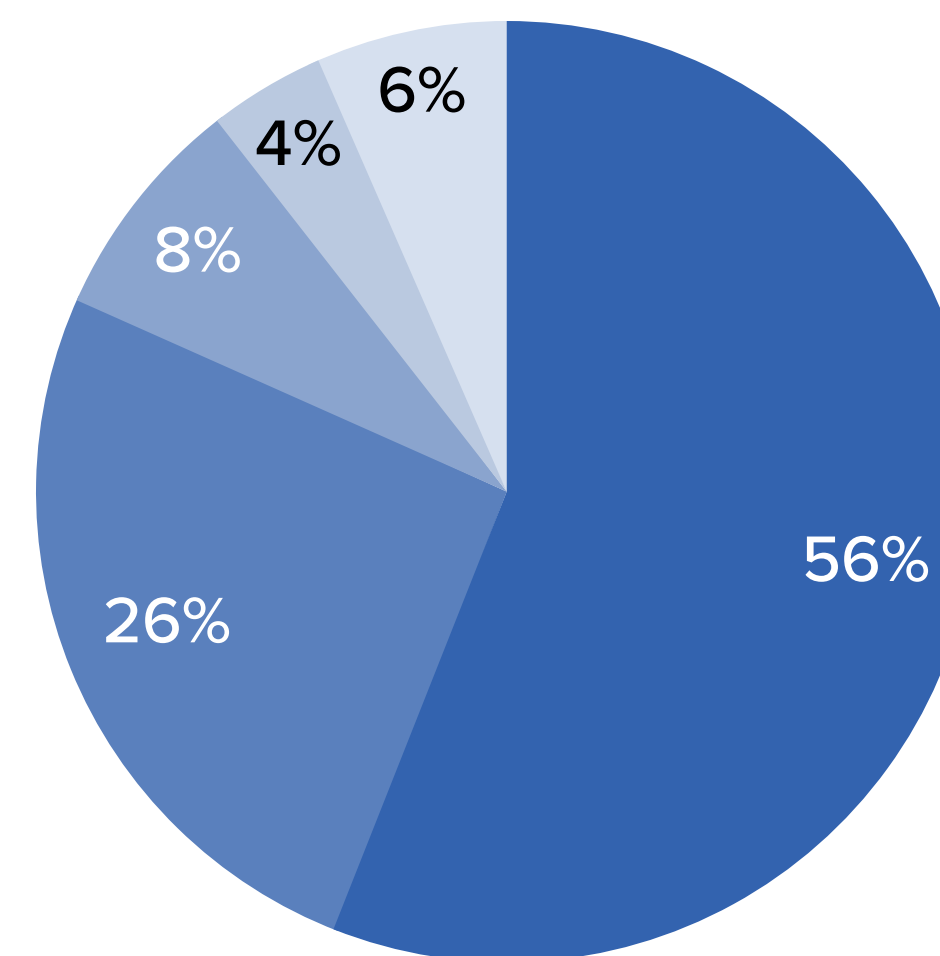
Value for
the money



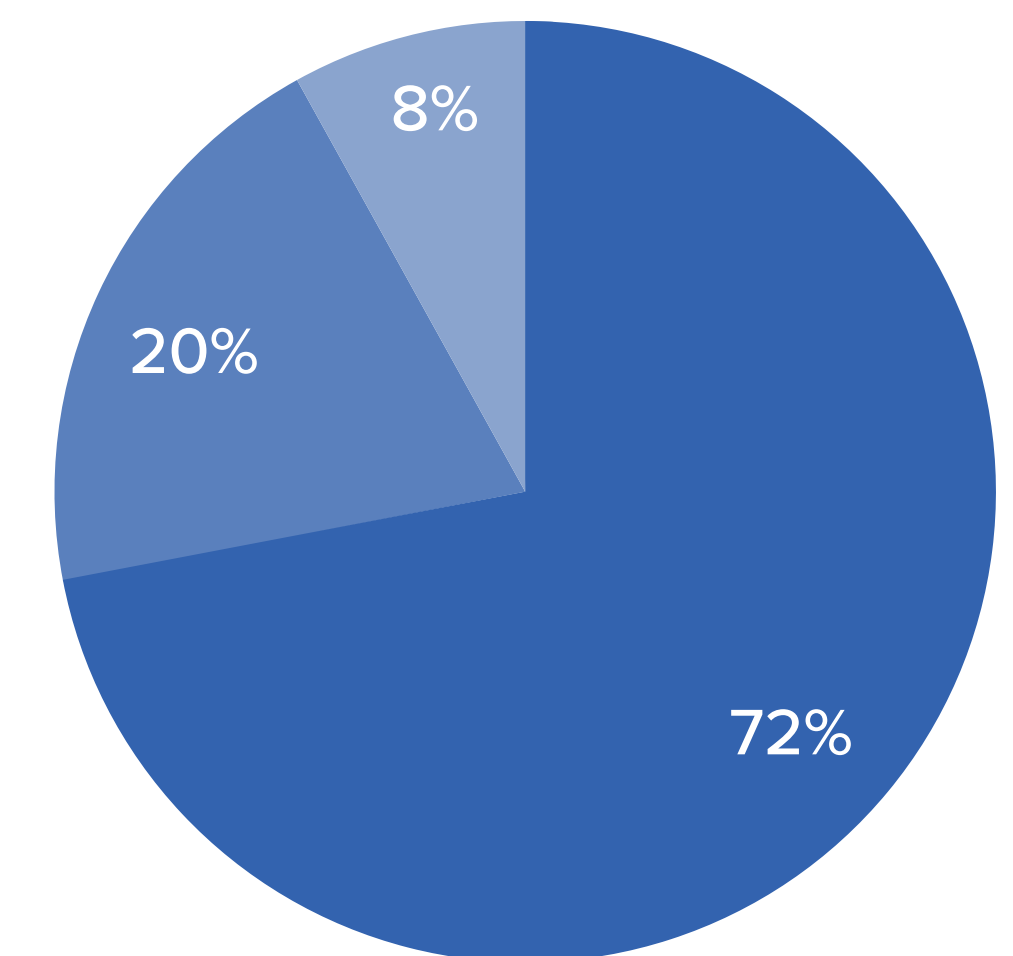
Food quality
consistency



Loyalty programs
and promotions

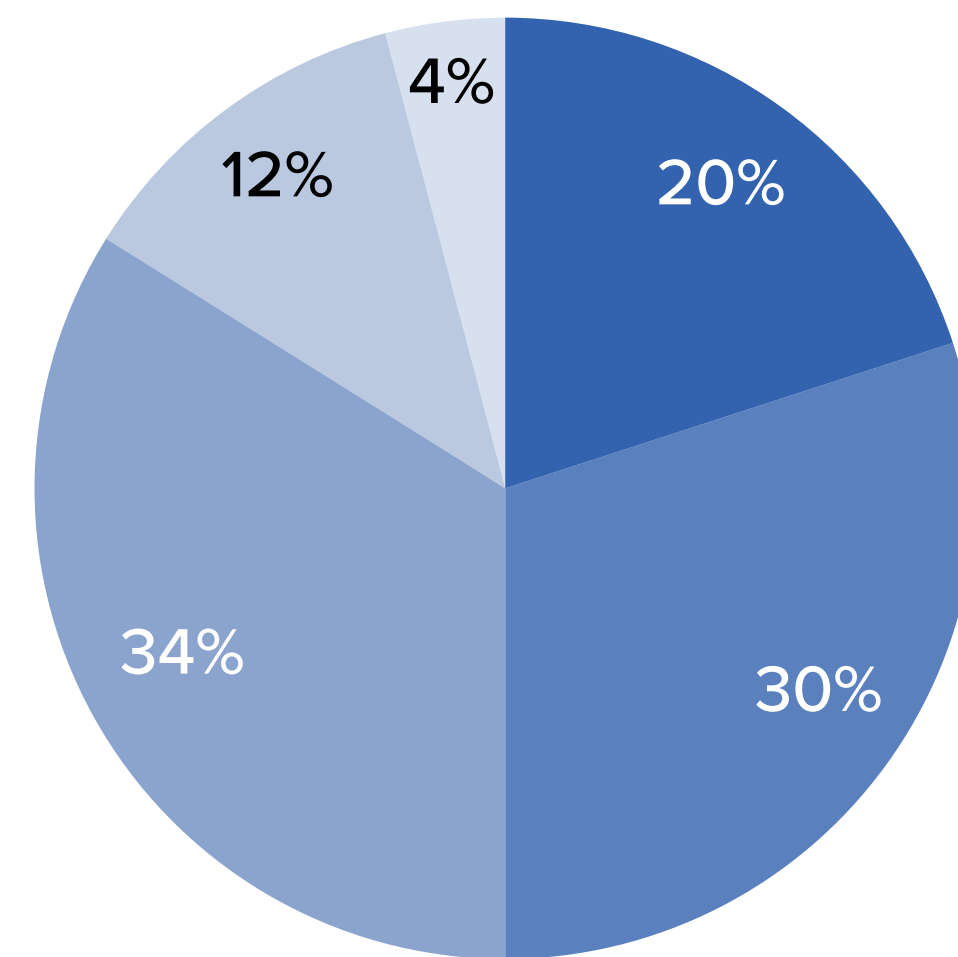


Customer
service

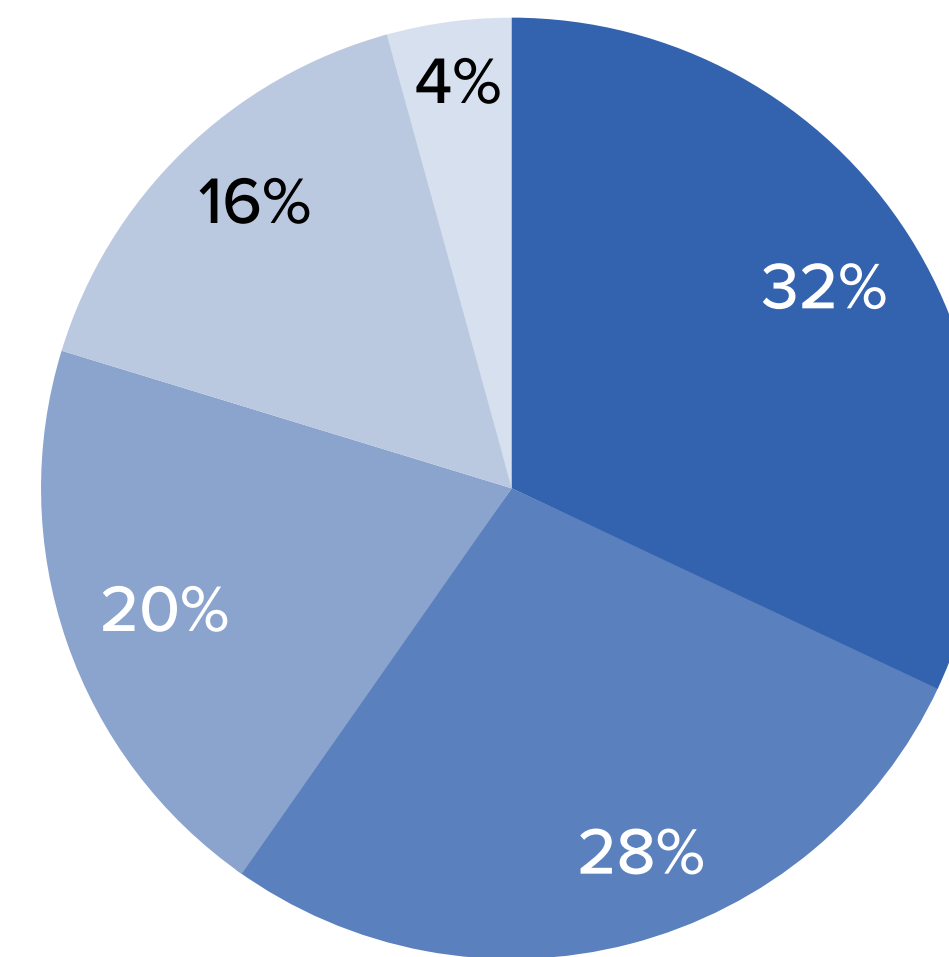


● 5 ● 4 ● 3 ● 2 ● 1

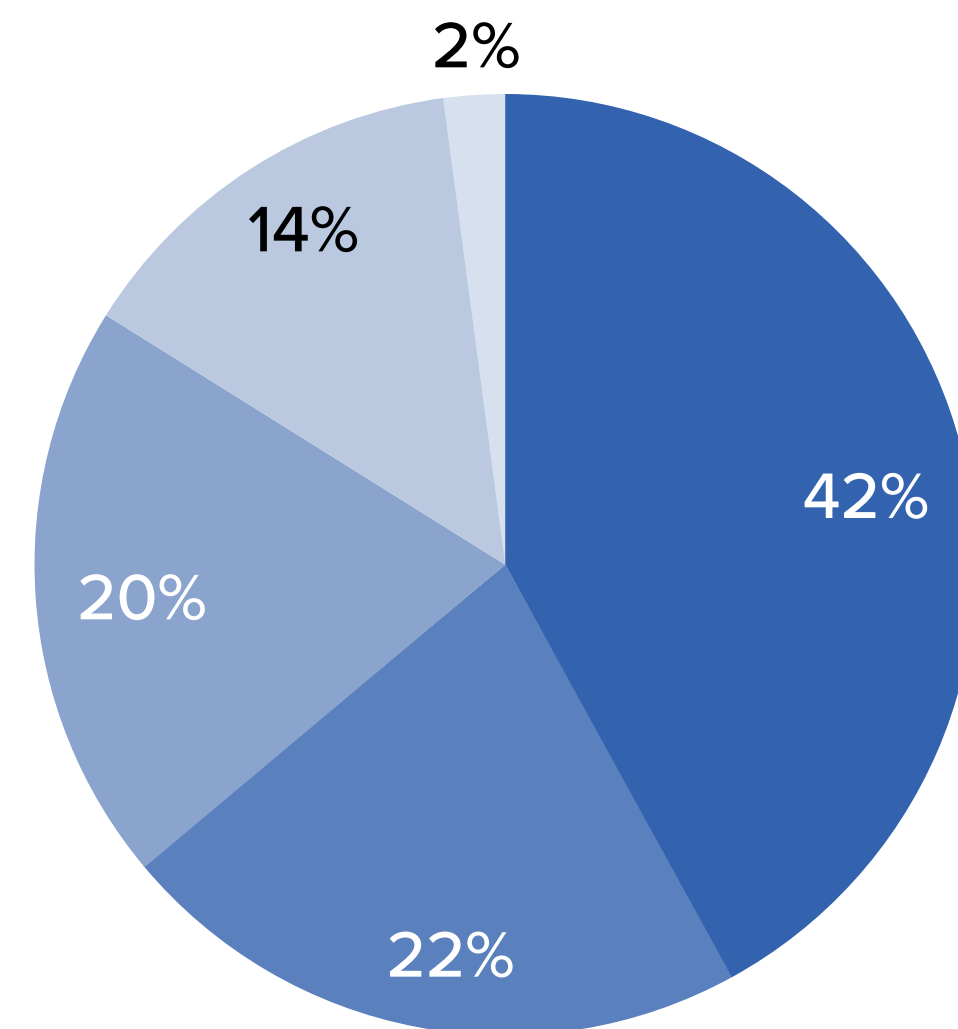
Healthy and/or diet-friendly
food options



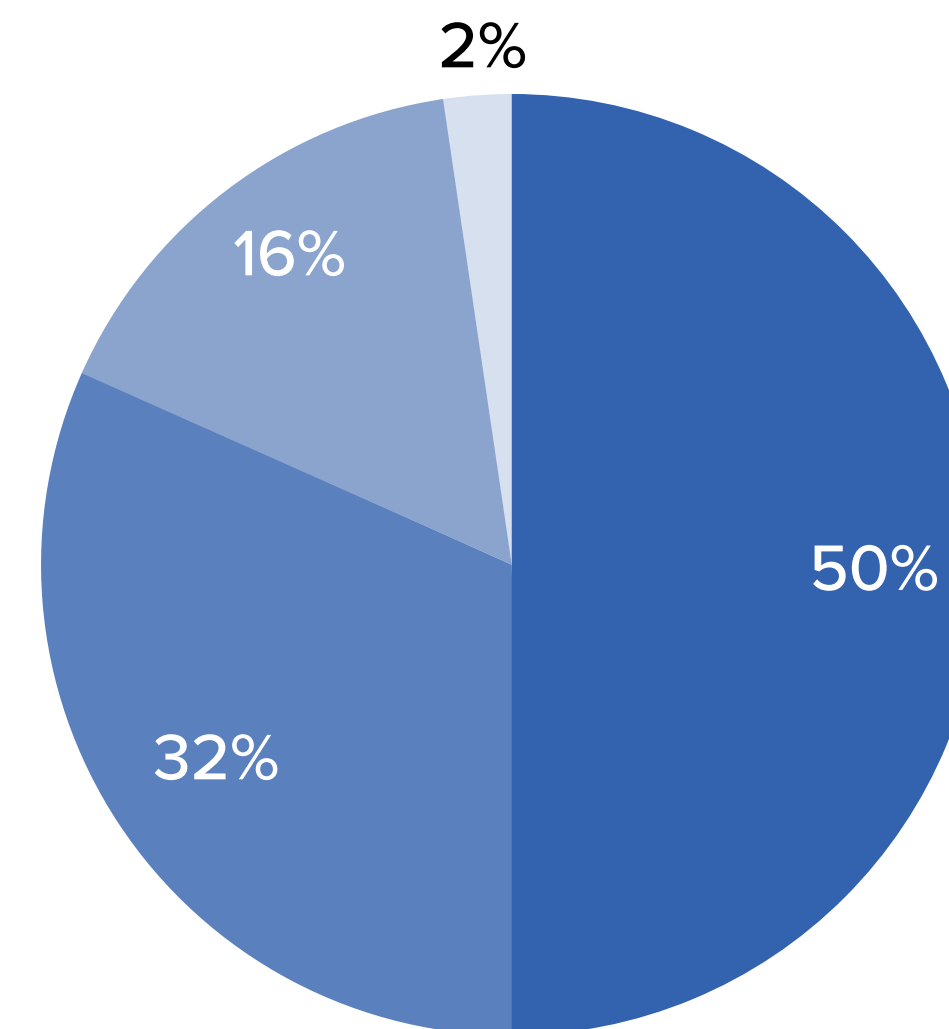
Healthy and/or diet-friendly
drink options



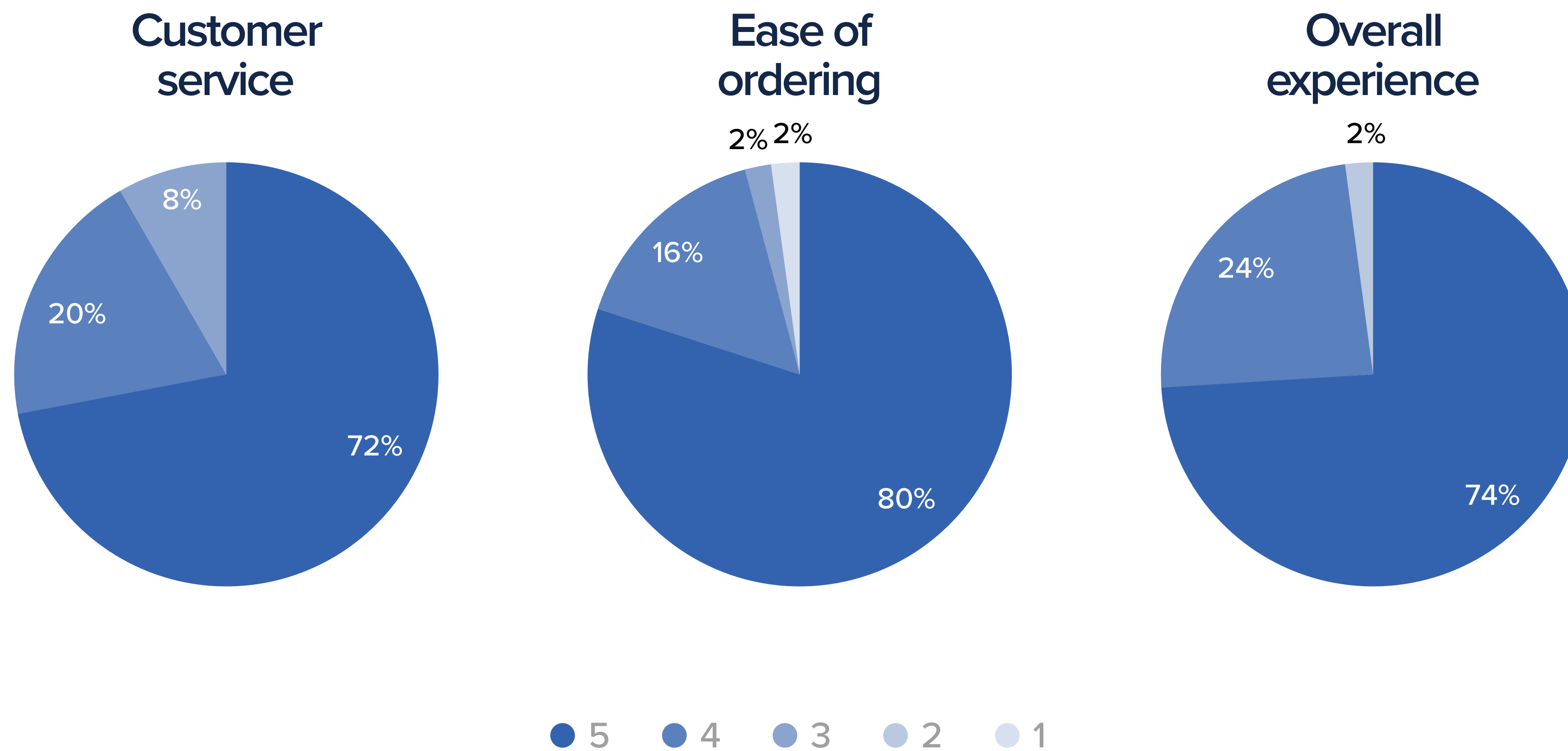
Choice of full sugar, no sugar,
and low calorie drinks



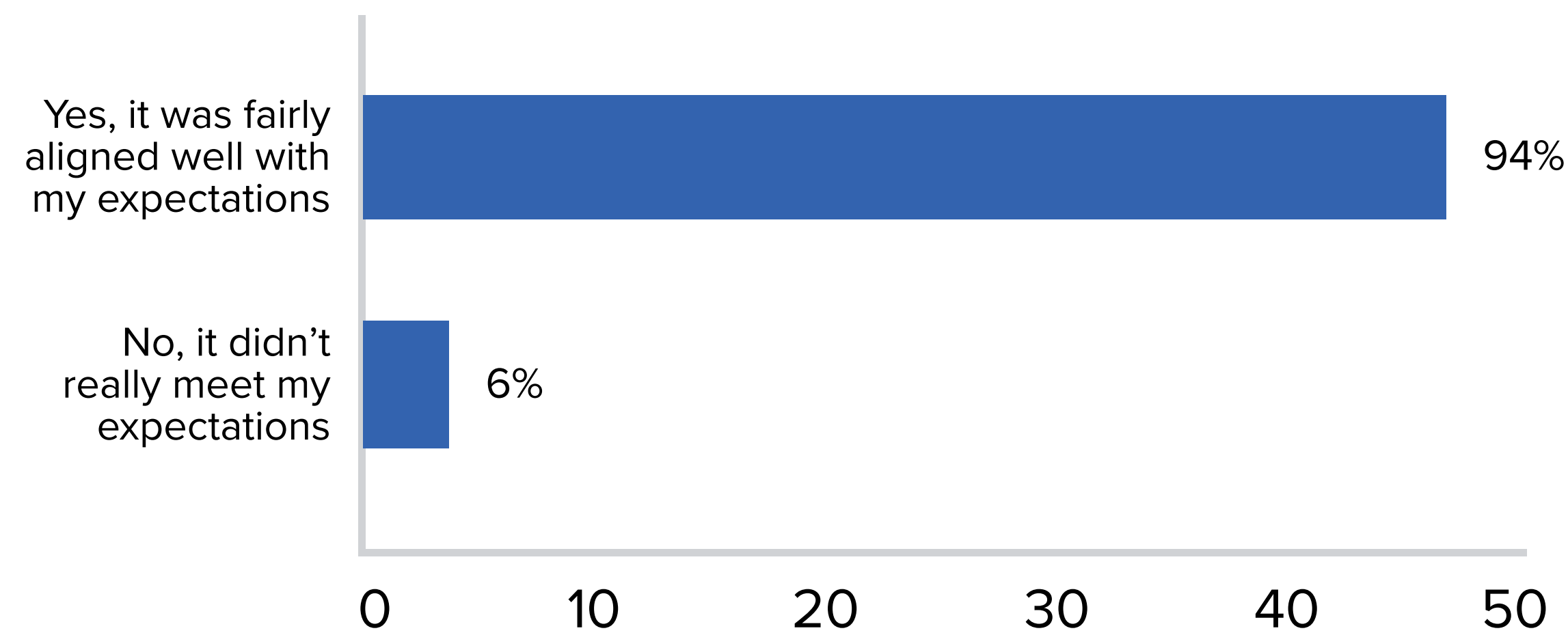
Clear communication on
product ingredients and calories



● 5 ● 4 ● 3 ● 2 ● 1

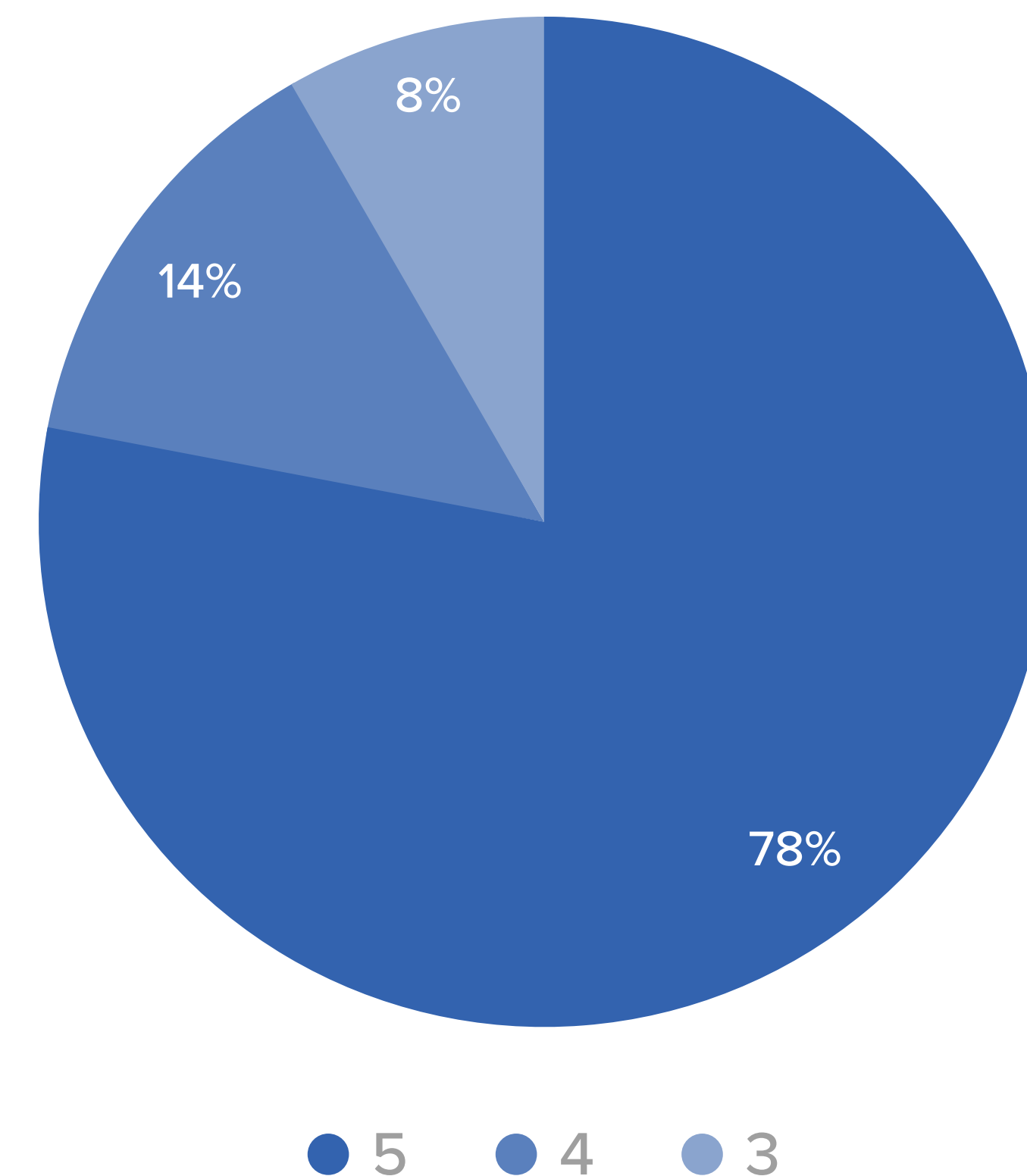


Did this experience align with what you said was important?



Based on this experience, how likely are you to return to this restaurant's drive-thru in the near future?

Scale from 1 (very unlikely) to 5 (very likely).





Rewards and Loyalty Programming

Creating Lifetime Value with Rewards

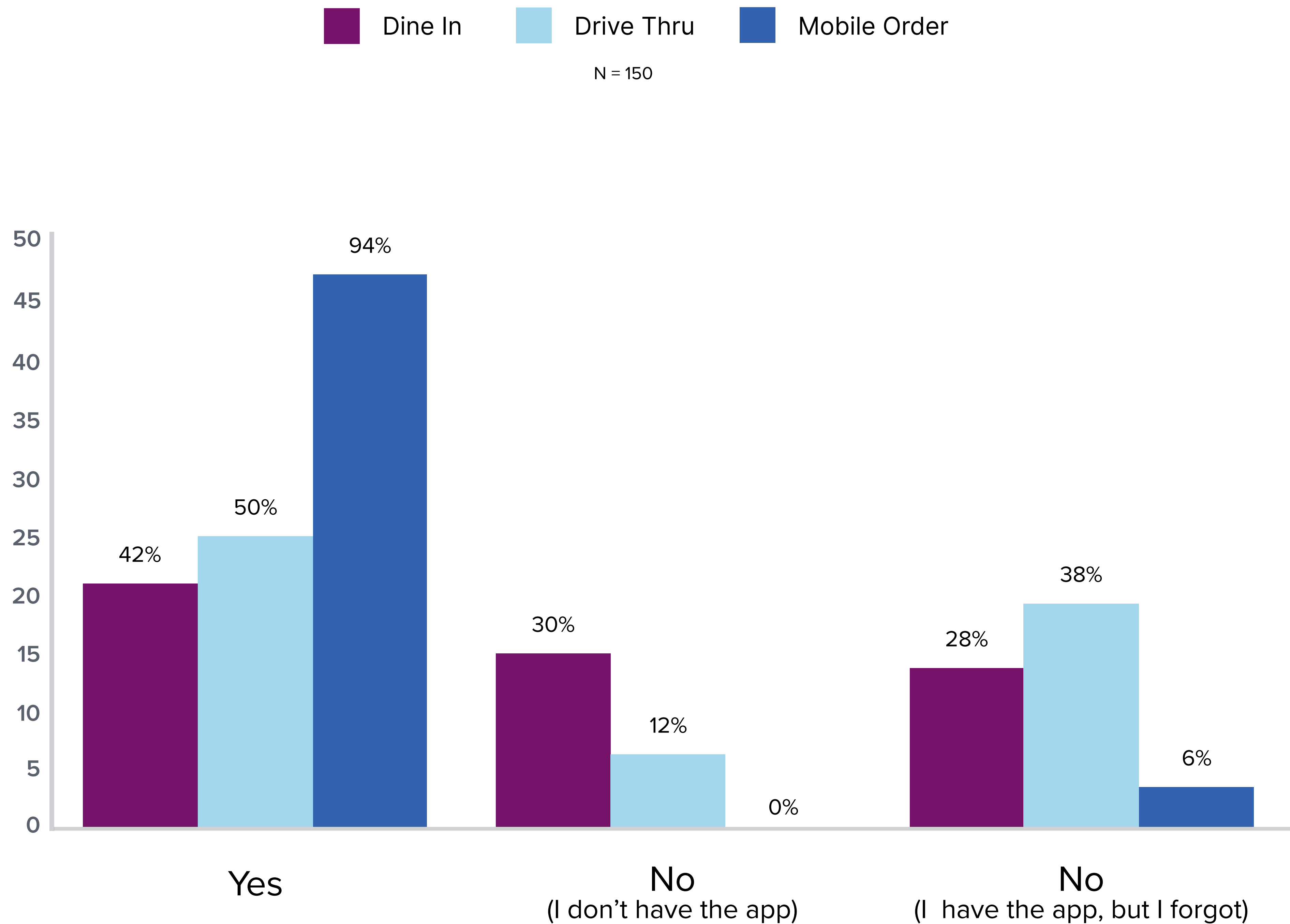
The data clearly points to **mobile order** as the prime channel for loyalty engagement, with 42% app usage, significantly outpacing dine-in (30%) and drive-thru (12%). This is a natural correlation: customers already digitally engaged for ordering are inherently more predisposed to digital loyalty. This means QSRs must prioritize integrating and promoting loyalty programs directly within their mobile ordering apps, making enrollment and redemption frictionless to capitalize on this existing digital fluency. For dine-in and drive-thru customers, strategies to drive mobile app adoption – perhaps exclusive in-app offers or QR codes – are crucial to migrate them to this higher-engagement loyalty platform.

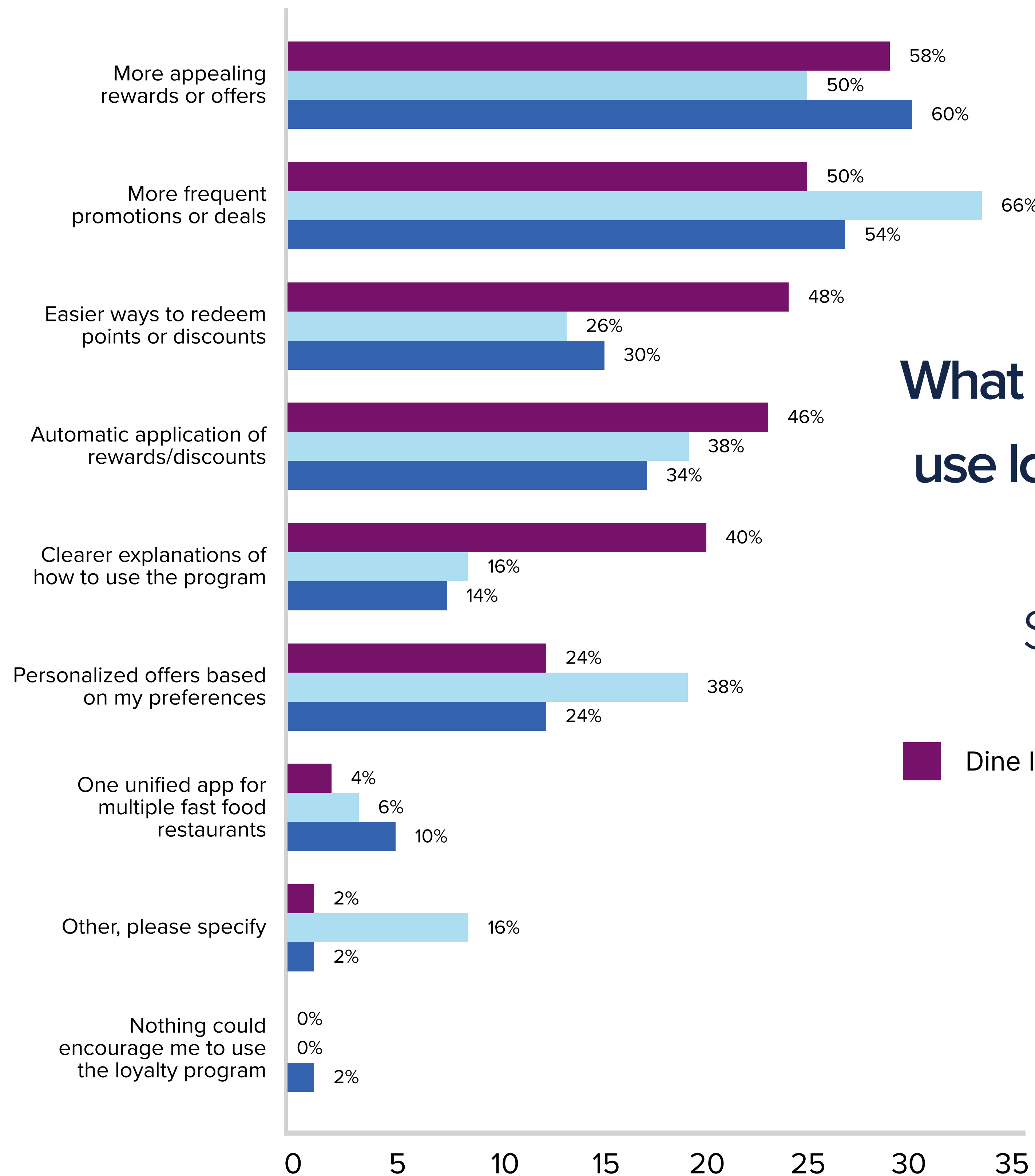
The consistent desire for "more appealing rewards or offers" (54-66% across channels) and "more frequent promotions or deals" (48-60% across channels) is a stark indication that current loyalty programs may not be perceived as valuable enough — suggesting a need for QSRs to move beyond generic point systems to offer more personalized, higher-value rewards.

The significantly higher importance of "personalized offers based on my preferences" for mobile order customers (66%) compared to dine-in (24%) and drive-thru (38%) is a powerful insight. Mobile app data provides a rich source of customer preferences and ordering history. QSRs should leverage this data to deliver highly targeted, personalized offers that resonate directly with individual customer habits and desires. This level of personalization can dramatically enhance engagement and perceived value for mobile-first loyalty users.




Ultimately, customer requests for changes related to "rewards" across drive-thru and mobile order channels underscore that loyalty programs are not just an add-on; they are an integral part of the desired customer experience. By addressing these stated desires for more appealing, frequent, and easy-to-redeem rewards, QSRs can unlock significant repeat patronage and foster deeper, more lasting customer relationships.

Did you use an app to collect loyalty points or rewards?

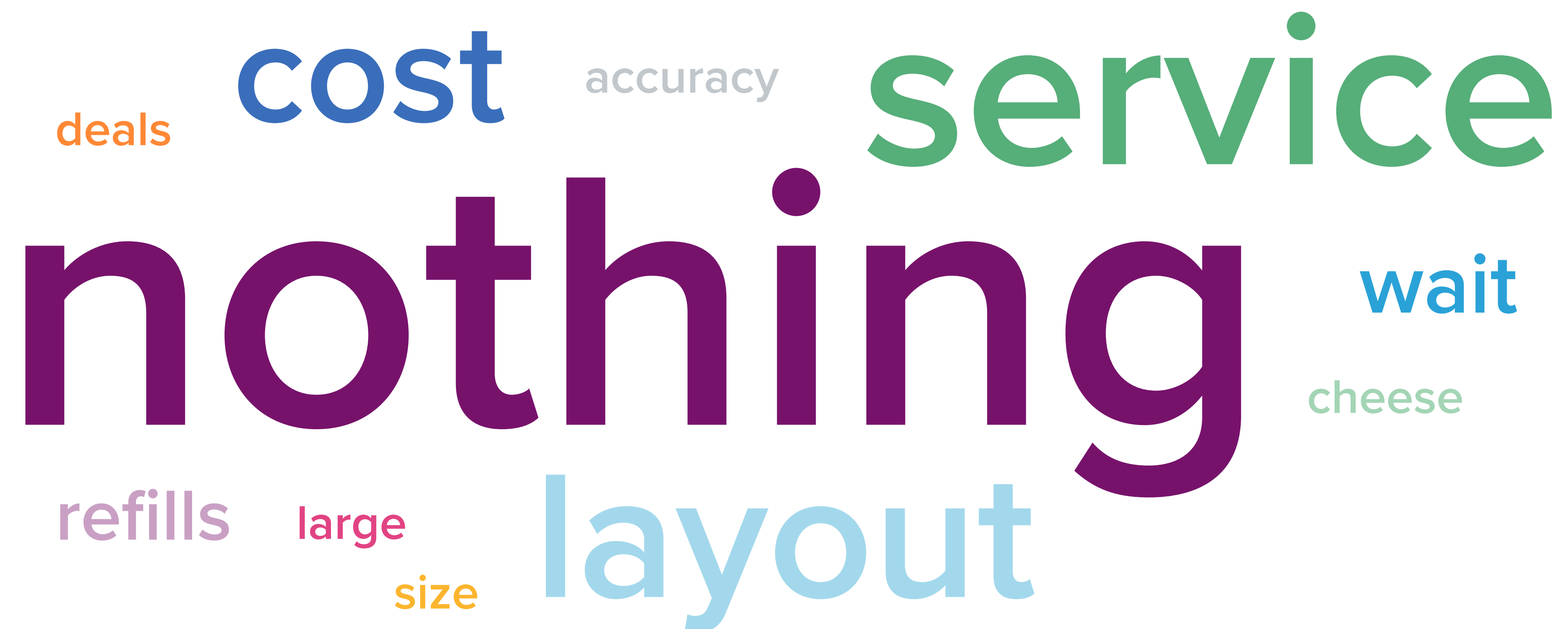




What could encourage you to use loyalty program features in the future?
Select all that apply.

 Dine In  Drive Thru  Mobile Order
N = 150

If you could change one thing about this dining experience,
what would it be?



A word cloud visualization of factors for improving a dining experience. The word 'nothing' is the largest and most central, colored purple. Other prominent words include 'service' in green, 'cost' in blue, and 'layout' in light blue. Smaller words include 'wait' in blue, 'cheese' in green, 'refills' in purple, 'large' in pink, 'size' in orange, 'deals' in orange, and 'accuracy' in grey.

nothing

service

cost

wait

layout

deals

accuracy

cheese

refills

large

size

If you could change one thing about this dining experience,
what would it be?



A word cloud of dining experience factors. The words are arranged in a circular pattern around the word 'nothing'. The words and their colors are: 'accuracy' (grey), 'freshness' (blue), 'service' (green), 'wait' (orange), 'rewards' (orange), 'variety' (blue), and 'layout' (purple). The word 'nothing' is the largest and is light blue.

accuracy freshness service
nothing wait
layout variety rewards

If you could change one thing about this dining experience,
what would it be?

A word cloud visualization of responses to the question 'If you could change one thing about this dining experience, what would it be?'. The words are arranged in a non-uniform, overlapping manner. The largest word is 'nothing' in dark blue. Other prominent words include 'app features' in light blue, 'nutrition' in purple, 'rewards' in orange, 'options' in green, 'size' in pink, 'wait' in light orange, and 'payment' in grey.

rewards options size nutrition
nothing wait payment
app features

Strategic Recommendations

Optimize Channel-Specific Experiences

- **Dine-In:** Focus on enhancing the overall ambiance, comfort, and personalized customer service to encourage longer stays and higher ticket averages (e.g., leveraging the \$12.93 most common spend). Utilize attractive point-of-sale merchandising for impulse buys, particularly for desserts (23% conversion rate).
- **Drive-Thru:** Prioritize speed and accuracy (only 29% of orders \leq 2 minutes, 94% accuracy). Invest in technology (e.g., AI voice ordering, dual drive-thrus) to minimize wait times and errors, especially for larger orders (most common spend \$26.99). Simplify menu boards and optimize holding times to address "freshness" concerns.
- **Mobile Order:** Capitalize on high perceived food quality (66% temp, 74% freshness) and loyalty engagement (42% app usage). Continuously refine the mobile app's User Experience (UX) and User Interface (UI) for easy discoverability of health information (96% availability, 52% interest).

Evolve Menu Strategy with Data

- **Value Proposition:** Ensure value menu information is easily accessible across all channels (e.g., currently only 38% easy to find on mobile). Tailor messaging to channel-specific motivations: "family value" for drive-thru, "quick smart choice" for mobile, and "great deal for a satisfying meal" for dine-in.
- **Health & Wellness:** Innovate beyond traditional healthy options to create "craveable healthy" items. Promote these prominently within mobile apps, accompanied by clear and easily navigable nutritional information.

Revitalize Loyalty Programs

- Redesign loyalty programs to offer more appealing (54-66% desire), frequent (48-60% desire), and personalized (66% mobile order desire) rewards that are easy to understand and redeem (30-46% desire for easier redemption). Leverage mobile apps as the primary platform for loyalty, driving adoption with compelling incentives.

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