

Emerging Experiences:

The State of Mobile Order Ahead

IN PARTNERSHIP WITH:

QSR



Table of Contents

| | | | |
|----------------|----------|---|----|
| SECTION | 1 | EXECUTIVE SUMMARY | |
| | | Study Overview & Methodology | 3 |
| | | Definitions | 4 |
| SECTION | 2 | BENCHMARK COMPARISONS | |
| | | Key Findings | 5 |
| SECTION | 3 | STUDY RESULTS | |
| | | • Operational Reliability & Order Readiness | 6 |
| | | • Ordering Flow & Experience Efficiency | |
| | | • Technology Performance Risk | 7 |
| | | • Pickup Experience & Handoff Execution | |
| | | • Speed of Service Performance | 8 |
| | | • Order Accuracy & Food Quality | 9 |
| | | • Human Interaction & Service Recovery | |
| | | • Personalization & Service Closure | 10 |
| | | • Revenue Impact & Suggestive Selling | |
| SECTION | 4 | WHAT THIS MEANS FOR OPERATORS | |
| | | • The Intouch Advantage | 11 |
| | | • About Intouch Insight | |

Executive Summary

This report, part of our annual Emerging Experiences Study series, looks at the mobile order ahead experience. This report isn't about who did it best but what the leaders are doing and the bar that is being set for performance in this ever-evolving digital landscape.

Key Themes

- Mobile removes ordering friction, but exposes fulfillment gaps
- Reliability matters more than speed
- Human interaction still determines the outcome

Study Overview & Methodology

Intouch Insight evaluated 449 mobile order-ahead experiences across 9 major QSR and fast-casual brands.

| | |
|--|--|
| <p>Drive-Thru Pickup Brands</p> |  |
| <p>In-Store Pickup Brands</p> |  |
| <p>Dayparts</p> | <p>Dunkin' shopped mornings only (5:00am - 10:30am); all other brands split (+/- 5%) between Lunch (10:30am - 1:30pm) and Dinner (3:30pm - 7:00pm)</p> |

**Chick-fil-A had 49 shops total, the remaining 8 brands had 50 shops total per brand.*

Shopper Order Instructions:

Shoppers were instructed to order 1 Main Entrée, 1 Side Item, and 1 Beverage.

Areas Evaluated:

App Ordering & Usability | Pickup Instructions & Logistics | Speed of Service | Order Accuracy | Food Quality | Friendliness & Satisfaction

Definitions

Friendliness: To measure friendliness, Shoppers were asked to rate the service received on a three-level scale: Friendly, Neutral, Not Friendly.

Greeting Rate: Shoppers were asked a yes or no question whether they were greeted or acknowledged upon entering the location.

Order Accuracy: Shoppers were asked a yes or no question whether their order was filled correctly and completely, including special requests.

Order Experience Satisfaction: Shoppers were asked a single binary question: "Overall, how satisfied were you with the order experience?". The available answer options were Satisfied or Not Satisfied.

Overall Satisfaction (OSAT): Shoppers were asked a single binary question: "Rate your satisfaction with the level of service you received?". The available answer options were Satisfied or Not Satisfied.

Parting Remark: Shoppers were asked a yes or no question whether they were given a parting remark before leaving the store.

Service Time (mm:ss): is measured by the duration of the pick-up experience. For orders being picked up in the drive-thru, the time starts when the shopper enters the drive-thru, and for the in-store pickup experience, when they enter the store.

Satisfaction with Speed of Service: Shoppers who said speed felt 'As Expected' or 'Quicker Than Expected'.

Suggestive Sell: The practice of intentionally upselling an additional item. Can be done at any time while the order is being taken (the onset of your order or after you have ordered your item). *Example: Did you want to add a drink and make it a combo?*

There's more behind the data.

Our full Emerging Experiences Study dives deeper into the results, offering expanded analysis and a closer look at how each brand performed throughout the mobile ordering experience.

[Request more insights →](#)

 1-800-263-2980  letschat@intouchinsight.com

Benchmark Comparisons

To evaluate how the mobile order ahead experience is shifting the guest experience, benchmark data from the 2025 Annual Drive-Thru Study and the 2026 On-Premises Study is used as a point of comparison. This context helps quantify differences in performance, satisfaction, and expectations across ordering channels.

2026 On-Premises Benchmark

The 2026 On-Premises Study evaluated the guest experiences of traditional in-store orders placed at the counter with an employee.

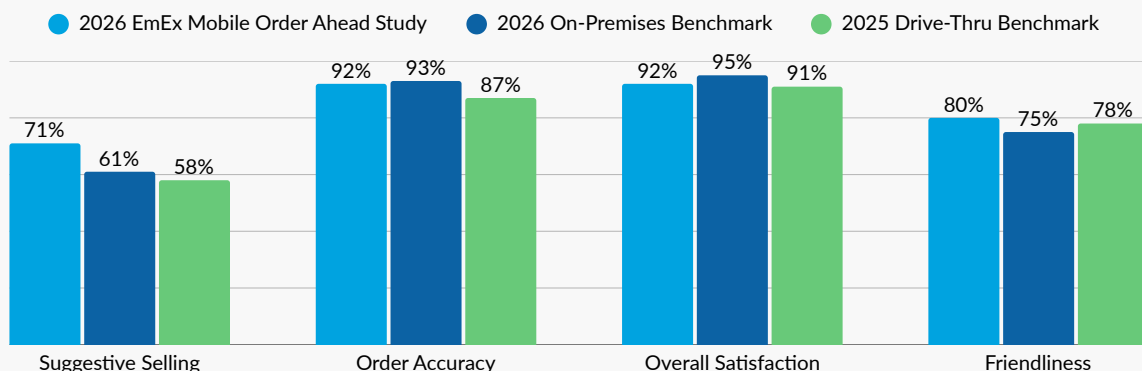
2025 Drive-Thru Benchmark

The 2025 Drive-Thru Study evaluated the guest experiences of traditional orders placed via the drive-thru speaker box with an employee.

Key Findings

The chart below compares KPIs from the 2026 Emerging Experiences (EmEx) Mobile Order Ahead Study against the 2025 Annual Drive-Thru Study and the 2026 On-Premises Benchmark Study.

Mobile Order Ahead Study vs. Benchmarks - Key KPI Comparison



2026 EmEx Mobile Order Ahead Study: N=449, 2026 On-Premises Benchmark: N=753, 2025 Drive-Thru Benchmark: N=2,145

Key Takeaways from the Drive-Thru and On-Premises Benchmark Comparison:

- Suggestive Selling is the standout metric where mobile ordering leads both benchmarks by a wide margin (+13 percentage points over Drive-Thru; +10 percentage points over On-Premises), reinforcing the technology's edge as a revenue lever.
- Order Accuracy at 92% is on par with On-Premises (93%) and above Drive-Thru (87%).

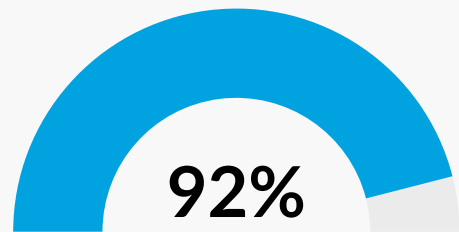
In the **2025 Emerging Experiences Study**, specifically the Mobile Order for Pickup section (n=80) featuring Dutch Bros, Chipotle, and Wingstop, the Parting Remarks score dropped by 11 percentage points from a 93% baseline. This represents a clear decline in how experiences are being wrapped up across the industry. This trend was echoed in the 2026 On-Premises Study, where Parting Remarks scored 78%. Meanwhile, Suggestive Selling increased from 57% in 2025 to 71% in 2026.

Study Results

Operational Reliability & Order Readiness

Mobile ordering is designed to reduce wait times and improve convenience, but that promise is not consistently being met. Approximately 1 in 5 orders (21%) were not ready on time, which directly impacts satisfaction and overall perception of the experience. **Satisfaction drops from 97% when orders are ready on time to 76% when they are late**, reinforcing that reliability, not speed alone, is the defining factor of success in this channel.

Mobile Ordering Experience Satisfaction Score Avg.



Q: Overall, how satisfied were you with the pickup experience? N=449

Key Data Insight

- Late orders increased total time spent in-store by 2.5x (2m51s → 7m10s).

Ordering Flow & Experience Efficiency

The efficiency of the ordering flow plays a central role in determining downstream performance. When the ordering experience is smooth, it sets the stage for accurate timing, faster service, and higher satisfaction. Conversely, friction at the ordering stage creates a cascade of issues that impact the entire experience.

The Link Between Pickup Experience and Customer Satisfaction



Key Data Insights

- 87% of orders were ready on time when flow was efficient
- Only 38% were ready on time when flow was inefficient
- Whenever the flow was inefficient and the order was not ready within time, Pickup Satisfaction dropped to 20%

Flow and Efficiency Rating for Order Experience

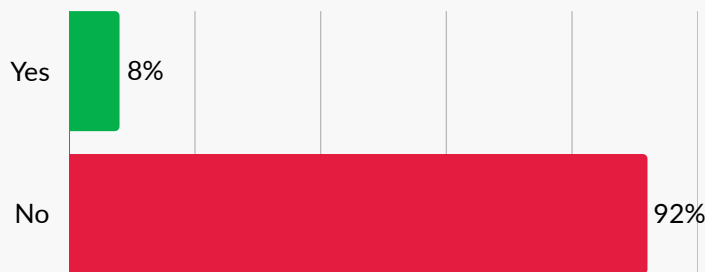


Q: Rate the overall flow and efficiency of your order experience N=449

Technology Performance Risk

Mobile apps are performing reliably across brands, with most users experiencing a smooth and uninterrupted ordering process. However, when technical issues do occur, they have a disproportionate impact on the customer experience. Even infrequent glitches significantly increase frustration and reduce perceived efficiency. This creates a high-risk, high-impact dynamic for digital performance.

Frequency of Technical Glitches



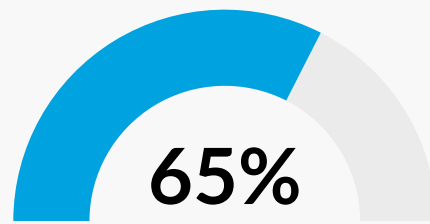
Key Data Insight

- It's no surprise that orders with glitches were 20x more likely to be rated as frustrating

Q: Were there any technical glitches in the ordering process?
N=449

Pickup Experience & Handoff Execution

The transition from digital order to physical pickup remains inconsistent across brands. While mobile ordering simplifies the ordering process, there is still a significant effort required for operational coordination at the store level. **Many locations lack standardized pickup areas or processes, leading to confusion and delays.** This gap undermines the efficiency gained through digital ordering.



65% of Mobile Orders had a designated pickup area/lane.

Q: Was there a designated pickup line/area/shelf for mobile orders?
Q: Was there a dedicated lane for Mobile Order Pickups?
Drive-Thru: N=99, In-Store: N=350

Key Data Insights

- 86% of customers still interacted with an employee during pickup
- Only 66% of orders were confirmed before handoff

Speed of Service Performance

When mobile ordering was used, both drive-thru and in-store pickup times are significantly faster than traditional ordering methods in terms of the total amount of time the customer spends in the store or drive-thru by removing the in-store ordering step from the experience. However, customer perception of speed is more closely tied to expectation and consistency than absolute time. Customers already have an idea of how long their order should take, and when it doesn't match, the experience feels slower than it actually is.

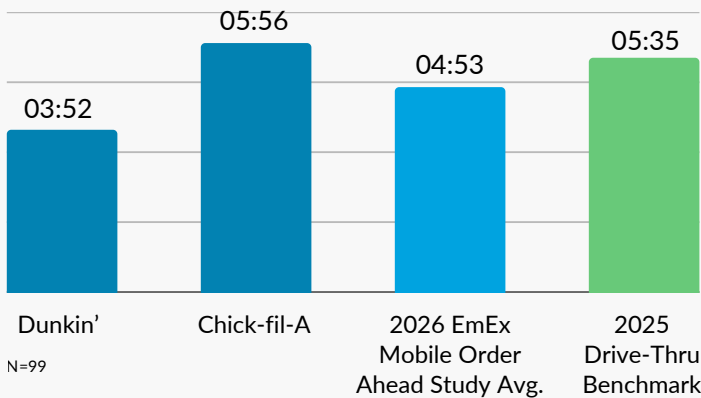


Q: When thinking about the "speed" of your order, was it: [Quicker than expected, As expected]
N=376

Key Data Insight

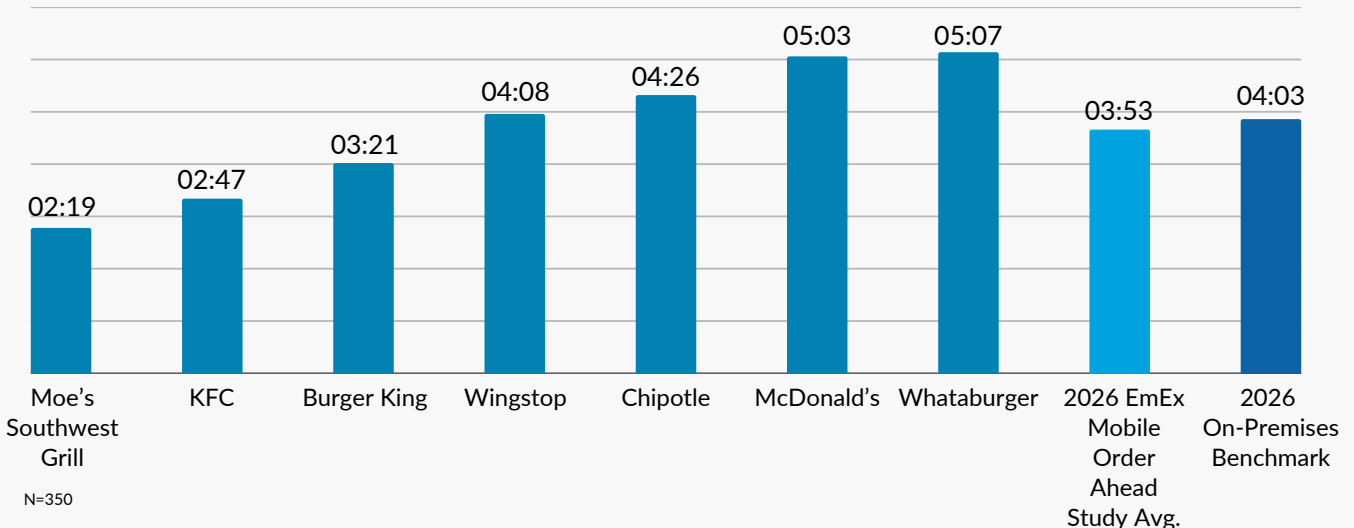
- 42% of mobile pickup orders were rated "quicker than expected," compared to 29% for the 2025 Drive-Thru Study and 27% for the 2026 On-Premises Study

Drive-Thru Pickup - Service Time (mm:ss)



Service Time (mm:ss) is measured by the duration of the pick-up experience. For orders being picked up in the drive-thru, the time starts when the shopper enters the drive-thru, and for the in-store pickup experience, when they enter the store.

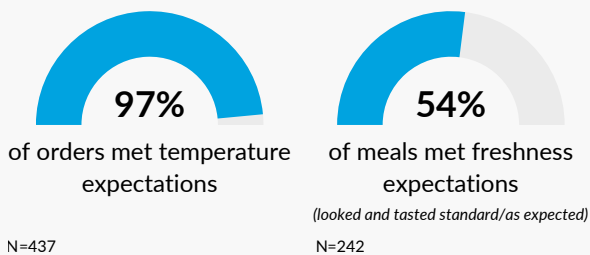
In-Store Pickup - Service Time (mm:ss)



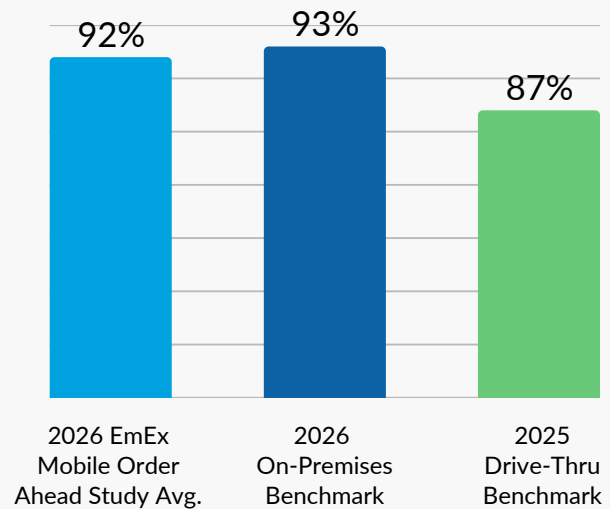
Order Accuracy & Food Quality

Mobile ordering gives customers more control over the ordering process, allowing them to customize items, take their time deciding, and confirm their order before submission.

Food Quality



Order Accuracy Scores - Benchmark Comparisons



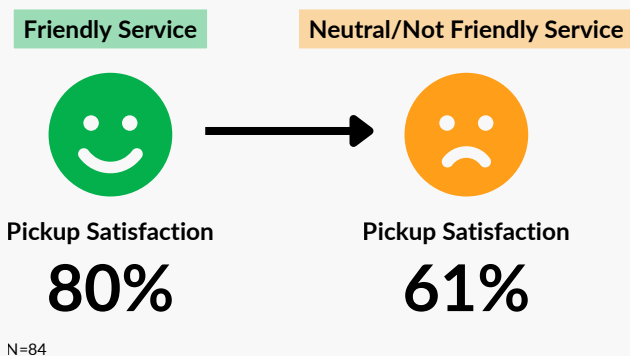
Q: Was your order filled correctly and completely (including special requests)? [YES]
2026 EmEx Mobile Order Ahead Study: N=414, 2026 On-Premises Benchmark: N=698,
2025 Drive-Thru Benchmark: N=1,865

Human Interaction & Service Recovery

Despite the rise of digital ordering, human interaction continues to play a critical role in shaping the customer experience. Staff behavior during pickup can either reinforce a positive experience or amplify frustration when issues occur. Notably, strong service can partially recover otherwise negative experiences caused by delays or operational issues.

Where there was an interaction with an employee, 80% of shoppers rated service as Friendly – outperforming both the 2025 Drive-Thru Study (78%) and the 2026 On-Premises Study (75%). Notably, in 62 of orders there was no interaction with an employee.

Friendliness in Late Orders and the Impact on Pickup Satisfaction



Key Data Insights

The biggest drivers of perceived friendliness:

- Eye Contact → increases Friendly ratings by +59 percentage points
- Pleasant Demeanor → increases Friendly ratings by +54 percentage points

Other key behaviors that lift friendliness scores:

- Smiling → increases Service score (% Friendly) by +49 percentage points
- Saying “Thank you” → increases Service score (% Friendly) by +30 percentage points

Personalization & Service Closure

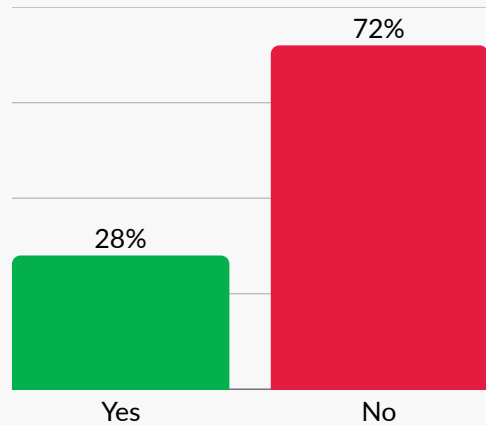
While mobile ordering enables personalized experiences through loyalty programs, this potential is not fully realized at pickup. Most interactions remain transactional, with limited recognition of the customer. At the same time, basic service behaviors, such as parting remarks, are declining compared to last year's Emerging Experiences Study, reducing the overall quality of the experience.

Parting Remarks



Q: Were you given a parting remark before leaving (e.g., "Have a nice day")? [YES]
 2026 EmEx Mobile Order Ahead Study: N=387 *Shops where there was no interaction with the employee are excluded.
 2026 On-Premises Benchmark: N=547

Personalization Rate

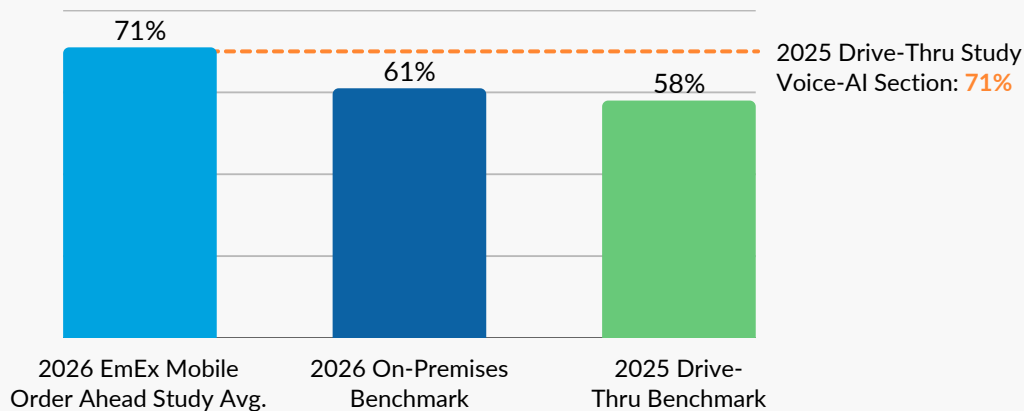


Q: Did you experience personalization (e.g., greeted by name, acknowledged as loyalty member) during your pickup?
 N=449

Revenue Impact & Suggestive Selling

Mobile ordering stands out as a consistent driver of incremental revenue through suggestive selling. Unlike human interactions, digital prompts are reliably executed and standardized across locations. This creates a scalable opportunity for brands to increase average order value without adding operational complexity.

Frequency Suggestive Selling



Q: Was a suggestive sell offered during the online ordering process? [YES]
 2026 EmEx Mobile Order Ahead Study: N=317, 2026 On-Premises Benchmark: N=456, 2025 Drive-Thru Benchmark: N=1,664


What This Means for Operators

Mobile ordering has successfully streamlined the ordering process, but it has **shifted the operational burden to fulfillment and pickup**. The brands that will lead in this space will prioritize clear pickup processes, coupled with friendly service at handoff and other customer interactions.

Key Priorities

- Improve order readiness accuracy
- Standardize pickup zones and instructions
- Reinforce order confirmation at handoff
- Invest in frontline service training
- Optimize digital upsell strategies

The story doesn't stop here. For more data and insights from our 2026 Emerging Experiences study, [contact us](#).

 1-800-263-2980

 letschat@intouchinsight.com



The Intouch Advantage

Intouch Insight combines mystery shopping results with real-time guest feedback surveys to give operators a 360-degree view of the customer experience at every touchpoint, from the moment a shopper opens the app to the moment they walk out the door.

The result is a centralized intelligence platform that:

- Connects structured mystery shop data (behavioral compliance, timing, accuracy) with unstructured guest sentiment (open comments, star ratings, NPS)
- Surfaces location-level patterns that aggregate scores can mask
- Enables proactive coaching with real-time alerts when locations fall below threshold on critical KPIs like order confirmation, parting remarks, or pickup instruction clarity
- Tracks improvement over time with longitudinal benchmarking against prior waves and competitive category averages

Mobile ordering has raised the operational bar. Brands that want to stay ahead of that bar need more than a report; they need a continuous feedback loop. Intouch Insight delivers that system.

About Intouch Insight

Intouch Insight is a leading customer experience (CX) solutions provider trusted by multi-location brands across North America. Our platform combines mystery shopping, customer surveys, operational audits, and advanced analytics to give operators the real-time intelligence they need to deliver consistent, brand-standard experiences at every location. From QSR and fast casual to retail, hospitality, and automotive, Intouch Insight helps organizations translate field-level data into measurable business outcomes. Learn more at intouchinsight.com.