

# MOBILE ORDER-AHEAD

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## Tracker

## How Ritual Uses Data Analytics To Help Small QSRs Compete

FEATURE STORY (p. 6)

JUNE 2019

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 **Kount**® PYMNTS.com

# MOBILE ORDER-AHEAD Tracker

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## Acknowledgment

The Mobile Order-Ahead Tracker is powered by Kount, and PYMNTS is grateful for the company's support and insight. [PYMNTS.com](https://pymnts.com) retains full editorial control over the following findings, methodology and data analysis.



Mobile ordering is more popular than ever, with 60 percent of United States consumers [ordering](#) delivery or takeout once a week. The volume of orders placed via mobile apps [grew](#) 130 percent between 2016 and 2018, too, and mobile orders now represent approximately 60 percent of all digital food orders. Such services are particularly popular among millennials, with 57 percent saying they have food delivered specifically so they can stay home to watch movies or television. This explosive growth has resulted in industry experts predicting that the mobile order-ahead market will reach \$38 billion by next year.

Restaurants are frenetically exploring ways to provide customers with all the mobile ordering bells and whistles, such as rewards programs, third-party payment integrations and surprise-and-delight offers. While some eateries are launching their own proprietary apps, others are partnering with third-party platforms to gain revenue. This option is particularly popular among regional chains and independent restaurants that do not have the resources to support their own systems.

The shadow of cybercrime still looms over mobile ordering, though, with consumers and businesses alike losing millions of dollars to fraud every year. If the industry wants

to continue its upward trajectory, it's crucial that these issues are addressed before consumers decide that the convenience is not worth the risk.

### **Around the mobile order-ahead world**

Coffee giant Starbucks recently [began](#) rolling out its mobile order-ahead solution, Starbucks Now, in Beijing and Shanghai, China. The system is currently available at 300 locations in the cities, but Starbucks plans to further expand the offering throughout the country in the coming months. This move follows the 2018 launch of the Starbucks Delivers program in the region.

The Los Angeles International Airport (LAX) recently [joined](#) the mobile order-ahead scene with a new program that allows travelers to order from restaurants while they make their way through the airport. The program is powered by mobile ordering platform Grab, which has also been utilized at Hartsfield-Jackson Atlanta International Airport and Heathrow Airport in London. The LAX launch includes participation from seven food vendors, with more expected to be added in the coming months.

Ground-based vehicles are also getting in on the fun, with auto manufacturer Chevrolet recently [announcing](#) that

drivers will soon be able to order Domino's from their vehicles. The pizza chain joins Dunkin', IHOP and Starbucks, which already offer ordering functions via General Motors' GM Marketplace program for its vehicles' infotainment dashboards.

For more on these stories and other mobile order-ahead developments, read this Tracker's News and Trends section (p. 9).

### **How Ritual evens the playing field between independent restaurants and large QSRs**

Mobile order-ahead apps are ubiquitous among large quick-service restaurants (QSRs), but many mom-and-pop restaurants and regional chains do not have the means to develop solutions of their own. Mobile purchases now account for up to 20 percent of all QSR revenue, meaning the lack of an app can put a local restaurant at a serious competitive disadvantage. [Ritual](#) aims to level the playing field by providing independent eateries with a unified mobile app and rewards program. In this Tracker's Feature Story (p. 6), co-founder Ray Reddy explains how the platform helps small restaurants compete with big chains by providing the loyalty programs and data that can give them an edge in the market.

### **Deep Dive: QSRs face off against fraudsters and schemers**

Digital fraud increased by 13 percent in the past year, but the food and beverage industry saw the greatest growth of all at 60 percent — nearly four times above average. Card-not-present (CNP) fraud is a particular nemesis, as digital ordering leaves few means for physical verification. This month's Deep Dive (p. 13) explores how fraudsters swindle both restaurants and their customers with efforts that range from account takeovers (ATOs) to old-fashioned confidence schemes.

## EXECUTIVE INSIGHT

### ***What are some of the emerging security threats that QSRs need to watch out for?***

"QSRs are fast to capitalize on the popularity of mobile ordering. Mobile apps make it easy for customers to quickly spend more money with a brand. Certain savvy consumer populations rely heavily on third-party apps or services when they choose to order online and either pick up in a restaurant or [have food] delivered to their homes. However, restaurants need to be just as savvy at anticipating the risks associated with using third-party payment providers.

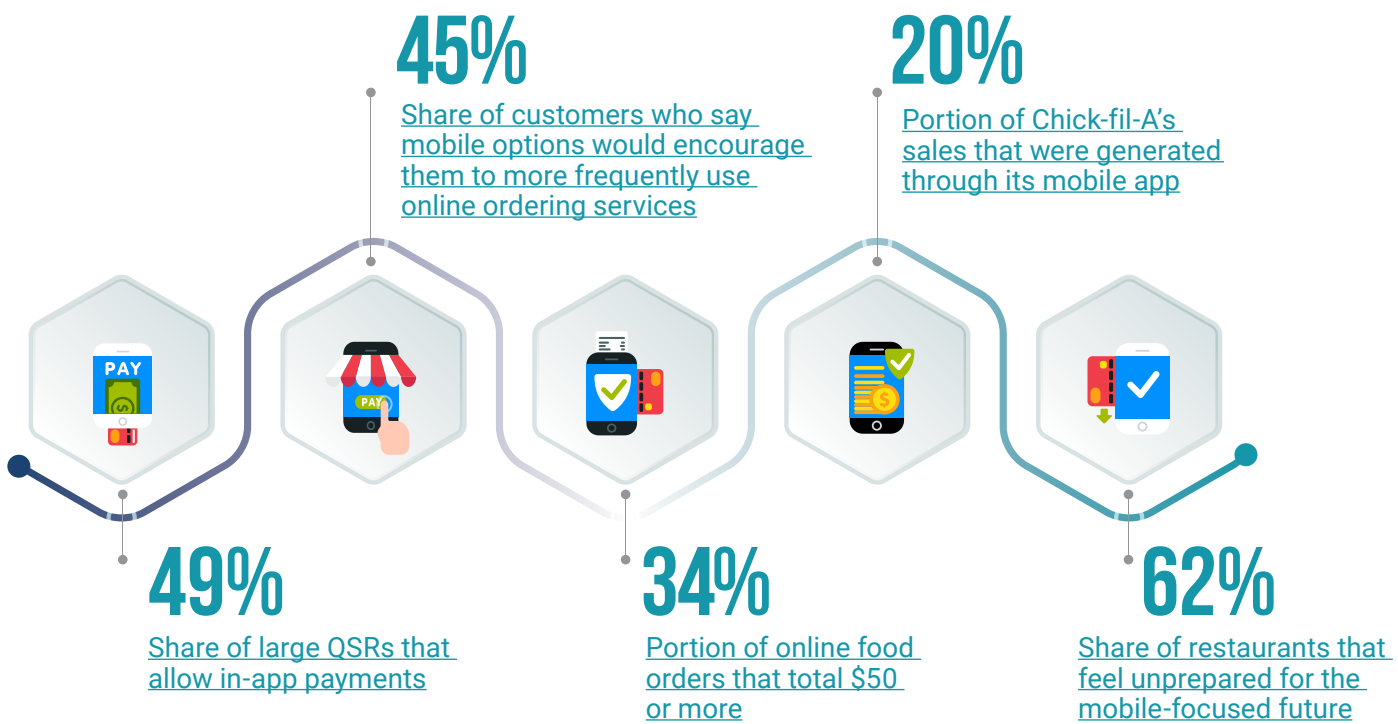
When merchants consider whether to manage the payment process internally or rely on third parties, they should anticipate and plan for the potential for fraud in each avenue.

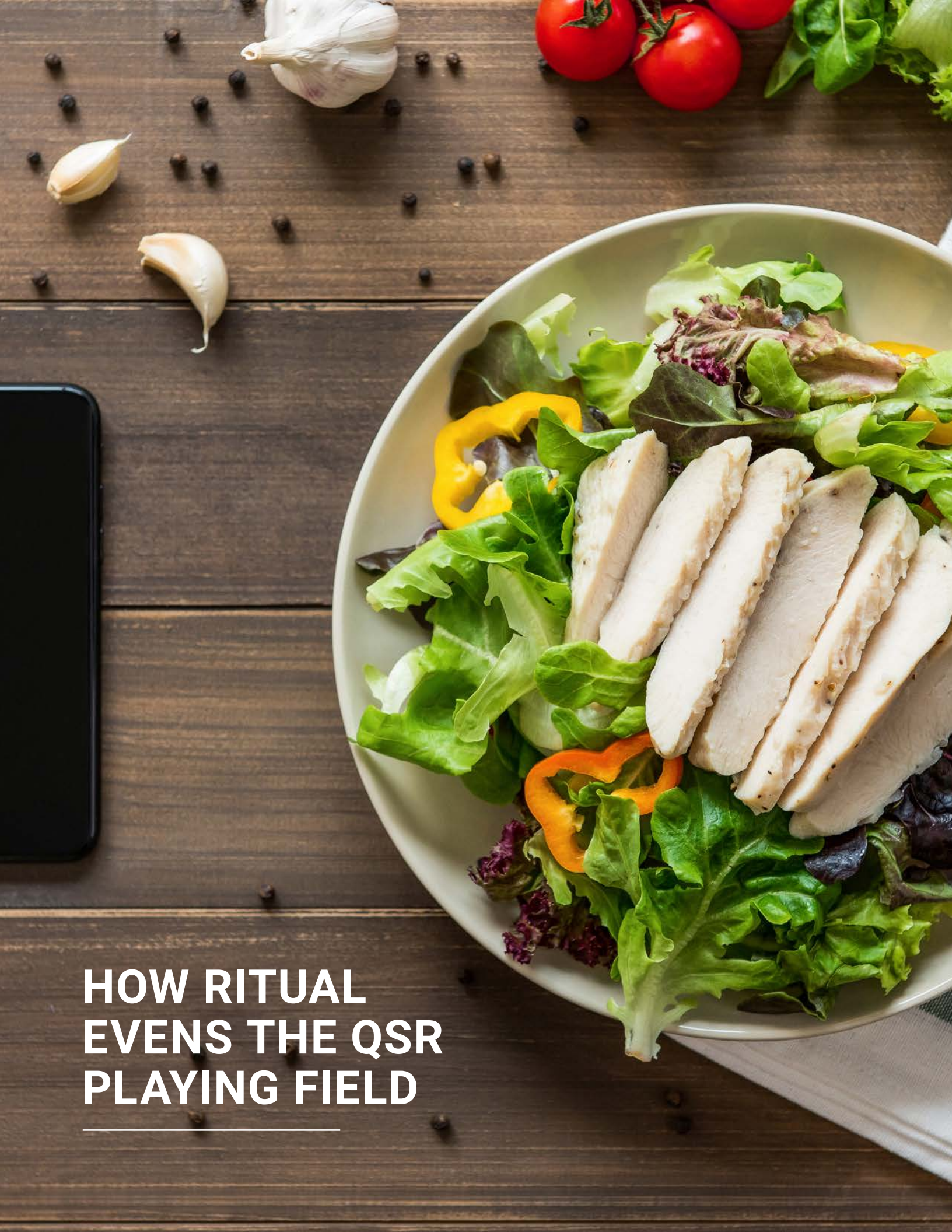
Restaurants should consider the risk of chargebacks — transactions might be held any time the processor believes that payments might be fraudulent — which can impact cash flow to the merchants. In addition, transaction fees can be high, so the margin of profit for QSRs is lower. When selecting to process payments with a third party, merchants give up control of their security. Should something go wrong, there is potential reputation risk for the restaurant.

QSRs should have robust fraud prevention in place when pursuing new avenues of digital innovation. That's where Kount comes in. With Kount's solution, you can protect the mobile experience for your customers and protect your brand.

— **Rich Stuppy**,  
chief customer experience officer, [Kount](#)

# FIVE FAST FACTS





**HOW RITUAL  
EVENS THE QSR  
PLAYING FIELD**

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Hundreds of mobile order-ahead options are now on the market, with nearly every large QSR in the U.S. operating its own apps and rewards programs. Mobile orders are immense revenue drivers — [accounting](#) for 11 percent of total QSR sales — but many mom-and-pop restaurants and regional chains do not have the necessary resources to develop their own solutions. This often forces them to miss out on potential sales.

Mobile ordering app [Ritual](#), which operates in major cities across North America, evens the playing field by offering order-ahead capabilities to independent eateries. PYMNTS recently spoke with co-founder Ray Reddy about how the app boosts small restaurants' revenues by equipping them with the valuable features that large chains might take for granted.

### **Exposure to new customers**

Ritual was born out of a key observation about the restaurant industry, Reddy explained.

"A lot of restaurants think that the people in their neighborhoods have all visited them," he said. "They feel like everyone in the neighborhood is a regular there. But what we find is that the

vast majority of people in most neighborhoods haven't actually visited the vast majority of spots."

Ritual combines a variety of restaurants onto a single app, encouraging customers to try those they have yet to visit. The app also features a piggyback system, allowing users to broadcast their orders to their coworkers so they can add on additional items for the initial customer to pick up.

"It's basically a productized version of you turning around to your cubemates and saying, 'Hey, I'm going to grab a coffee, do you want something?'" Reddy said. "It's that, but ... you don't have to deal with payment and everyone customizes their orders separately. Then you just come back with an extra cup of coffee or an extra salad in your bag."

The piggyback system took some heat last year after it inadvertently [exposed](#) confidential government offices. Many Department of Homeland Security locations are kept secret for security purposes, but reporters were able to determine exact buildings and floors by pretending to be agency employees on the app.

## Feature Story

“After that, we created a blacklist,” Reddy said. “We have certain companies that either can’t create teams, or can’t have teams that are publicly discoverable.”

### Ritual Rewards

Rewards programs are popular with large QSR chains, but relatively uncommon among independent restaurants — and for good reason.

“For a lot of smaller restaurants, there’s just not enough locations or frequency, and it’s not worthwhile collecting points or rewards,” Reddy said. “The reality is, if you’re not one of the top 10 big chains, it’s just difficult for you to use rewards to really change behavior.”

Restaurants that partner with Ritual have the opportunity to join the app’s point-based rewards system. Users can redeem points at any restaurant in the network, no matter where they were earned. Restaurants can also opt into Earn Plus, a feature offering customers extra rewards points when they make repeat visits to the same establishment in a short period of time. The time frames are dynamically generated for every restaurant visited by each user.

“It’s a clever algorithm that looks at how often you’d normally come back and gives you a shorter time frame to come back and make a second purchase within that window,” Reddy explained. “Let’s say you go to a salad spot once every week. What [Ritual] might say is that if you come back in four days instead of seven days, for example, we’ll give you 10 times the rewards points for that second visit. But [if] there’s another spot you go to every month, then you might only get two weeks to come back.”

Restaurants that joined this program saw their average visit frequency increase up to 25 percent, he noted.

### Picking up lunch, with data on the side

One of the biggest challenges for restaurant operators in the pre-digital age was that their usable data was largely determined by total sales. Restaurant owners knew what and how much they sold, but had little insight beyond those factors. Digital ordering provides a much clearer window into who patronizes these restaurants and what they are ordering.

“For the first time, restaurants have what I call the equivalent of Google Analytics,” Reddy explained. “[This is coming] not just from [Ritual], but from a lot of third parties. If a hundred people tried the restaurant this month, how many of them came back and made a repeat visit? And why is that different across your different stores? Is it because of a staff training problem? Is it because of a speed problem?”

Restaurants can use this data to compile an accurate list of key performance indicators (KPIs), allowing them to paint a more comprehensive picture of what they are doing right — and how to correct what they are doing wrong.

As valuable as the data gathered by mobile ordering apps is, it is far less useful if it cannot be compared to similar local restaurants. Ritual gathers that information and shares it with its member businesses, granting them a chance to be more competitive.

“If you’re a sushi spot, [Ritual shows you] what other sushi spots look like with these KPIs in your neighborhood,” Reddy said.

While large QSR chains may have greater resources for in-house analytics, it seems platforms like Ritual can give independent restaurants the insights — and additional revenues — they need to get a leg up.





## THIRD-PARTY MOBILE ORDERING SOLUTIONS

### Google incorporates mobile ordering

Technology giant Google recently made food ordering [available](#) via its Search, Maps and Assistant products, preventing mobile users from having to install additional apps to order food. Search and Maps now feature “Order Online” buttons on restaurant pages, while Assistant – Google’s voice-activated virtual assistant – recognizes the command, “OK Google, order food from [restaurant name].”

The new ordering solutions currently work with third-party delivery platforms ChowNow, Deliver.com, DoorDash, Postmates and Slice, and users are able to make their purchases with Google Pay. Google plans to add support for Zuppler and other delivery apps in the near future.

### Moduurn debuts new customizable mobile ordering solution

Moduurn, a software company based in Victoria, British Columbia, is also making mobile ordering advances with

its recently [introduced](#) cloud-based mobile ordering and delivery solution for restaurants. Designed for small and medium-sized businesses (SMBs) that may not have the resources to build their own apps, the product is customizable and suits a plethora of restaurant types. It also integrates into restaurants’ existing point-of-sale (POS) systems, ensuring a seamless payment experience for both merchants and consumers. Red Barn Market, a seven-location QSR also based in Victoria, has already adopted the solution.

Moduurn found that 45 percent of customers would use online ordering services more often if mobile or loyalty programs were available, and that 33 percent were willing to pay an extra fee for delivery. These options also serve to benefit restaurant owners, 60 percent of whom have reported increased sales after offering home delivery.

### ItsaCheckmate, Allset partner on new mobile ordering platform

Mobile order-ahead developer ItsaCheckmate and ordering app Allset have [partnered](#) to help restaurants get on board with digital ordering. The collaboration will allow

restaurants that don't have third-party payment options to integrate them into their daily operations. The former's platform integrates multiple third-party ordering services like DoorDash, Postmates and Uber Eats into a single POS system of the restaurant's choice — such as Toast or Clover — while Allset enables customers to order and pay for meals via its proprietary mobile app. The latter is currently used by more than 2,000 restaurants in 11 cities around the U.S., while Bareburger, Dig Inn, Five Guys and Momofuku's Milk Bar, among others, use ItsaCheckmate.

### **QSRs ADOPT NEW MOBILE PROGRAMS**

#### **Starbucks expands mobile ordering in China**

Coffee giant Starbucks recently [began](#) rolling out its mobile order and pay system, Starbucks Now, to 300 stores in Beijing and Shanghai, China. This follows the implementation of its Starbucks Delivers program, which was released in the country in last year.

Starbucks Now users can tap GPS to choose store locations, place orders and pay before picking up their purchases. Beverages can be completely customized, including espresso shot types and whipped cream or milk quantities. The program also includes a points-based rewards system that offers customers free drinks after earning points for purchases. Customers earn points 25 percent faster if they use Starbucks stored-value cards to pay.

#### **Press Coffee Roasters introduces new mobile app**

Phoenix-based cafe chain Press Coffee Roasters recently collaborated with developer SpeedETab to [implement](#) a mobile order-ahead app into its seven locations. The former

selected the latter to develop the app because of its ordering, analytics and engagement tools. The coffee chain will also use Epson America's TM-m30 mobile POS (mPOS) printers to print out orders for baristas. App users can reorder their favorite drinks with the push of a button, and add credit or debit card information for automatic payments.

#### **Jamba Juice undergoes rebrand, launches mobile ordering**

Smoothie chain Jamba Juice is [undergoing](#) extensive rebranding as it shortens its name to Jamba and expands its menu to include bowls, oatmeal and sandwiches. This marks the chain's second major rebrand after being founded as Juice Club in 1990 and adopting the name "Jamba Juice" five years later. The Jamba name took effect on June 6, and all 850 of its locations are currently undergoing renovations to reflect the new direction.

Jamba is also releasing a mobile order-ahead app as part of the rebranding. The solution includes customization features, nutritional preferences and a loyalty program that utilizes the Punchh platform. Purchases will also be available for delivery via Postmates and Uber Eats.

#### **7-Eleven app uses new pin-based system to deliver**

Convenience store chain 7-Eleven has [expanded](#) the delivery capabilities of its 7NOW mobile app, enabling users to have items delivered to locations without traditional addresses. The app auto-locates the nearest 7NOW pins when users log in, indicating areas in which deliveries can be made. A courier is dispatched to the nearest 7-Eleven to pick up requested items and deliver them to the customer once an order is placed, a process that the chain claims will take less than 30 minutes. The service was originally

## News and Trends

only available in Dallas, Texas, but has since expanded to 27 metropolitan areas and 200 municipalities across the U.S.

### NEW ENVIRONMENTS

#### LAX launches order-ahead service

A major Los Angeles airport [launched](#) a mobile order-ahead program of its own last month, hoping to cater to travelers who want to grab food on the go. The initial launch includes seven participating LAX food vendors, though more are expected to be added to the service in the coming months.

Customers can use mobile ordering platform Grab to place orders, or take advantage of the preorder service at LAX-ShopDine.com. The solution enables them to delay their orders if they get slowed down checking bags or at security

checkpoints, and provides turn-by-turn directions to their restaurants of choice. It is part of LAX's new digital marketplace, which also includes an online catalog of products and navigation tools to help consumers find shops.

#### University of Lincoln, Preoday team on a new app

Mobile order-ahead is making its way to college campuses, too, with Lincoln, England's University of Lincoln recently [introducing](#) the DeliverSU app, powered by online technology platform Preoday. Students can use the service to reserve tables and place orders at the school's student union pub, The Swan. The university plans to expand the app to include the on-campus Tower Bar nightclub and live music venue.



Preoday CEO Nick Huckler stated that the service grants other benefits by allowing “the team at the [student union to] utilize customer data gathered via the app to forecast sales trends and develop personalized marketing campaigns.”

### **Domino’s mobile ordering comes to Chevrolet vehicles**

Auto manufacturer Chevrolet recently [announced](#) that a new ordering system will be integrated into GM Marketplace — an app for General Motors’ 2017 and 2018 models with infotainment systems — that will allow drivers to order Domino’s pizza from behind the wheel. Users need only set up their profiles and favorite orders on the latter’s website to enable the service, which allows them to place food orders via their vehicles’ infotainment screens. The service is more limited than Domino’s other mobile ordering options, as consumers can only reorder past purchases and are unable to enter new options. GM Marketplace offers similar services for Dunkin’, IHOP, Starbucks, Wingstop and several other QSRs.

## **MOBILE ORDERING TRENDS**

### **Digital restaurant sales to explode in the next five years**

A new [study](#) from consulting firm BRP found that smartphones are involved in nearly four out of every 10 meals, whether consumers are looking up menus, placing mobile orders or leaving reviews online. Millennials were the most prolific users, with 60 percent of such respondents

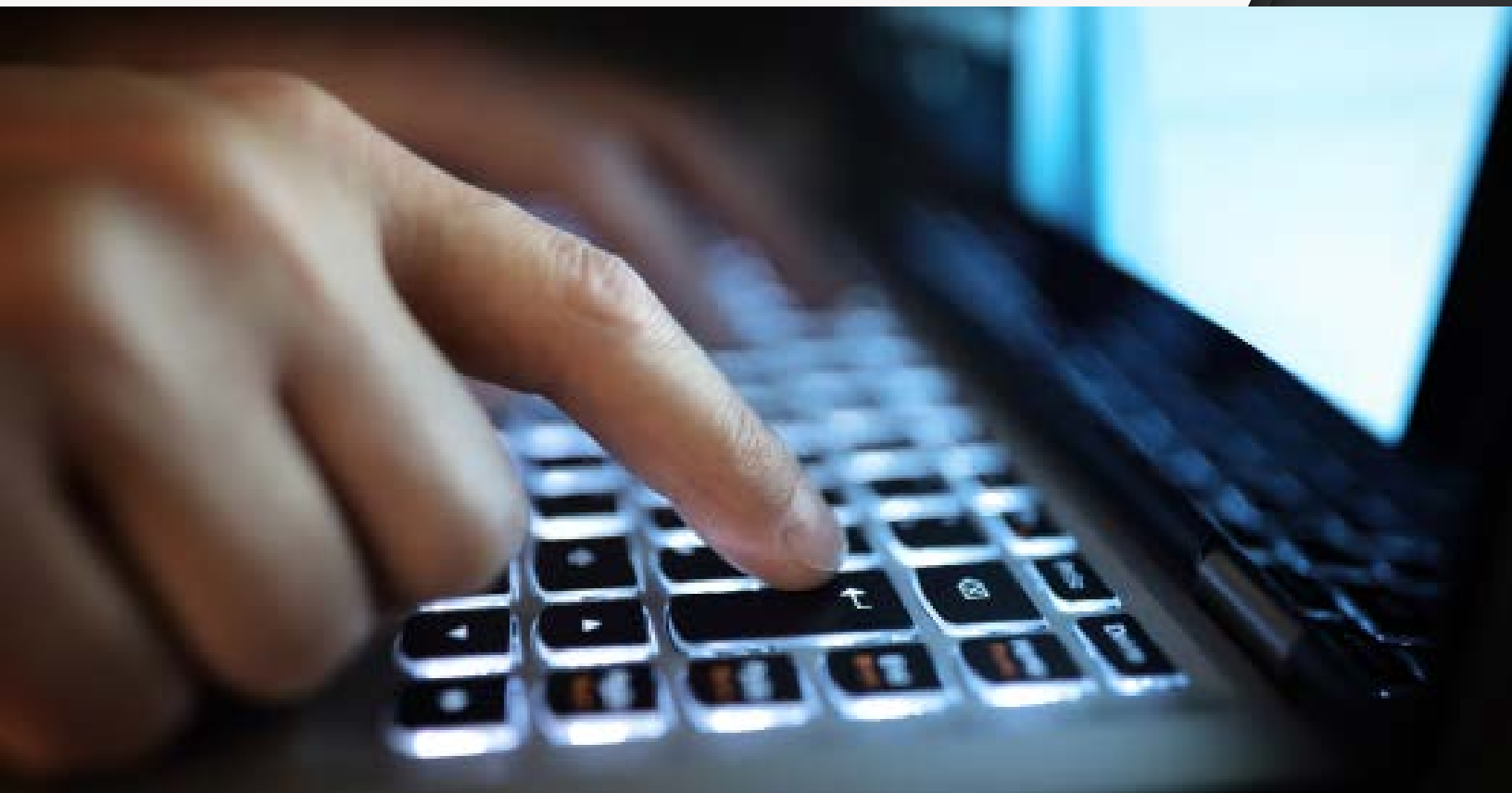
reporting they had used their phones to research where and what to eat, while 51 percent checked restaurant reviews from inside the venues.

The study projected that digital restaurant sales will balloon over the coming years, skyrocketing from 6 percent in 2017 to 30 percent by 2025. Restaurants must therefore adapt to their consumers’ digital needs. The research found that 48.8 percent of respondents indicated Wi-Fi as a key factor in determining where to eat, followed by tableside ordering services at 40 percent.

### **Just 1.4 percent of US consumers use location control services on their smartphones**

Location control is a valuable tool, preventing cybercriminals from fraudulently charging users’ accounts when their phones are not close by. A recent PYMNTS [study](#) of 9,500 U.S. consumers found that just 1.4 percent currently use such offerings, however, despite their fraud-prevention capabilities, but that 65.8 of respondents were “somewhat” or “extremely” interested in using them.

Most consumers surveyed felt that the risks of location services outweighed the benefits, resulting in the large discrepancy between interest and actual use. The most common fears were that payment data could be stolen or accounts misused, cited by 33.8 percent and 23.3 percent of respondents, respectively. The study’s findings suggest that usage will likely grow as consumers become more cognizant of location control services’ increased security.



## HOW FRAUD RUNS RAMPANT IN MOBILE ORDERING

Mobile order-ahead apps are growing more popular by the day, and restaurants are clamoring to get on board. A *QSR Magazine* [study](#) found that 73 percent of diners have used mobile ordering, 63 percent have at least one related app on their phones and 35 percent use mobile ordering every time they visit QSRs.

Consumers are eager to utilize these services, but cybercriminals are just as ready to exploit them. Digital fraud [increased](#) by 13 percent in the past year, with the food and beverage industry seeing an increase of 60 percent – nearly four times above average. It appears to be open season for hacks on mobile order-ahead apps, too, as data breaches continue to regularly make headlines and cybercriminals purchase stolen identities on darknet marketplaces.

### ATOs plague the QSR industry

Cybercriminals can obtain stolen identities for as little as \$4, meaning it's easier than ever for them to launch ATO attacks. They can then use individuals' credentials to gain access to accounts and obtain stored payment information, allowing them to make purchases or drain accounts of accrued awards points.

Such attacks have plagued McDonald's Canada's customers over the past few months, racking up thousands of dollars in fraudulent charges. One consumer in Nova Scotia [reported](#) more than \$480 CAD in illicit orders over four days, while a victim in Toronto [faced](#) more than \$2,000 CAD worth of charges in McFlurries, Big Macs, Chicken McNuggets and poutine.

The transactions occurred in rapid succession at multiple locations, suggesting that the hacker distributed stolen data to other criminals.

Chipotle's customers [reported](#) a similar string of attacks in April, with victims swindled out of up to \$500 USD each. One victim did not even have a Chipotle account, but had used the QSR's guest checkout option. Chipotle denied any breach of its databases or systems, but this was not the first time the chain had experienced fraud issues. It [suffered](#) a data breach at 2,250 of its restaurants in 2017, and the following investigation found that hackers searched for data on customers' credit card magnetic strips.

The McDonald's and Chipotle hacks are currently unsolved, underlining the difficulty of catching and prosecuting cybercriminals.

### **Card verification's ineffectiveness in the digital age**

Mobile-order ahead fraud is conducted remotely, making it widespread and hard to stop. Credit card theft has existed for as long as credit cards themselves, but physical verification methods such as signatures, state-issued IDs or PIN codes made using stolen cards difficult. The advent of the digital age has allowed hackers to commit CNP fraud, which occurs when bad actors use stolen information to make online purchases that do not require identity verification. Cybercriminals do not even need physical cards to commit CNP fraud – the card's number, expiration date, security code and personal billing information is enough – and all of that information is widely and cheaply available on darknet marketplaces. Such details can also be acquired via phishing schemes.

CNP hurts businesses as much as consumers. Banks and credit card providers are likely to refund cardholders when

their money is stolen, but businesses have no such safety net. A recent study found that merchants [absorb](#) fees of up to \$100 per transaction when customers request chargebacks, and can face fines of up to \$10,000 if these rates exceed a certain amount.

QSRs do not typically offer high-value items, but electronic gift cards are popular CNP fraud targets because they rouse little suspicion from law enforcement and are easily converted into cash. Cybercriminals use stolen credit cards to buy thousands of dollars in gift cards which they then sell at discounts online, leaving the franchisor responsible for the subsequent chargebacks.

### **Scamming, the old-fashioned way**

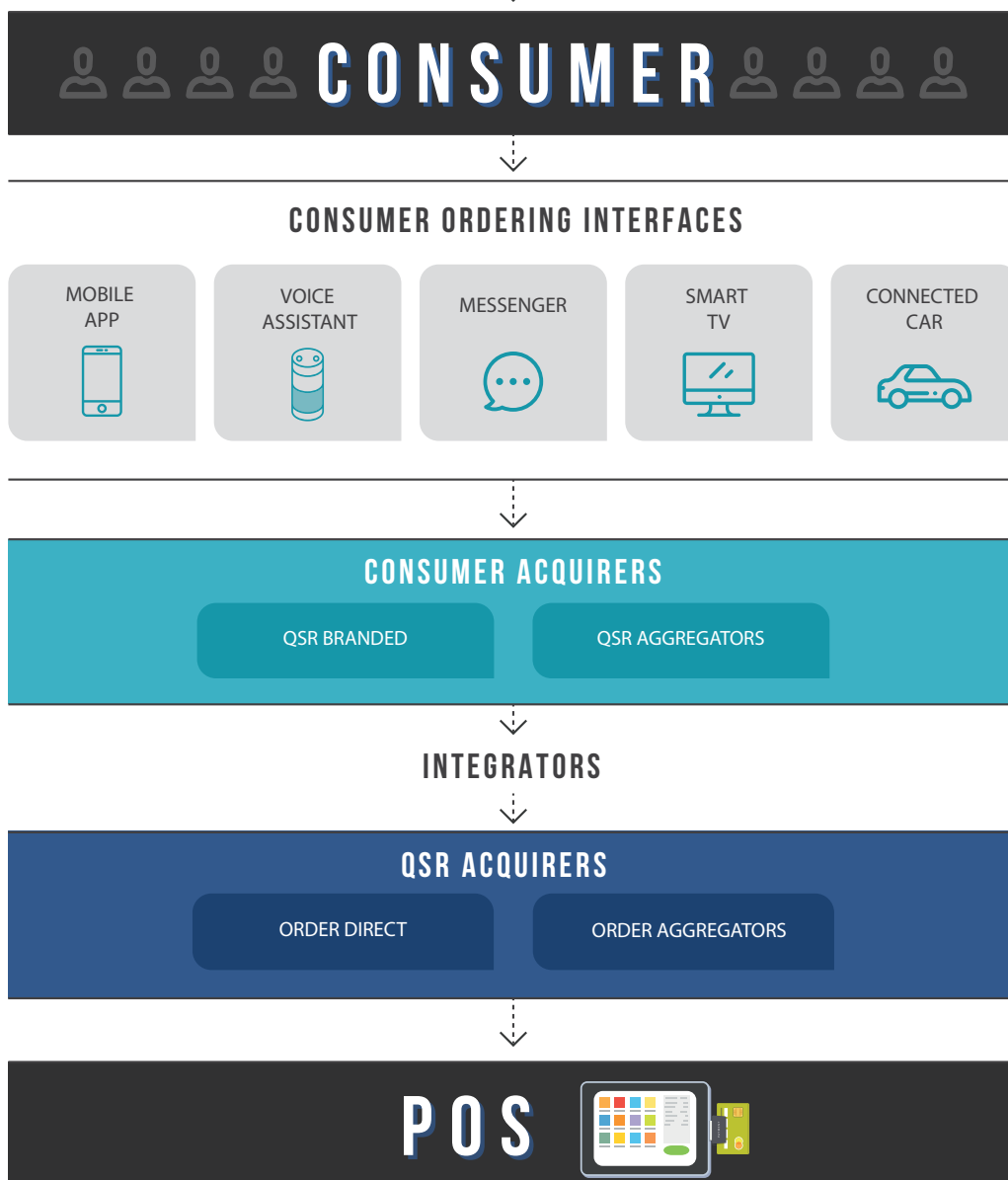
CNP attacks can be countered via advanced security methods like biometric authentication or tokenization, but not every type of fraud revolves around hacking, phishing or data theft. Old-fashioned confidence schemes still run rampant, whether they take place in person or over social media.

Confidence schemes usually involve fraudsters asking someone to deposit \$50 into their bank accounts with the promise of providing \$100 in restaurant credit. The criminals inevitably abscond with the cash and do not follow through on their offers, resulting in damage to the restaurant's name.

It is therefore incumbent upon restaurants and consumers to protect themselves against fraud by taking advantage of best practices like complex passwords or two-factor authentication (2FA). Sometimes even that is not enough to defend against smooth-talking criminals, however. Consumers and businesses alike must thus understand the threats they are up against and be on their guard, or they could be robbed blind.

# MOBILE ORDER-AHEAD ECOSYSTEM

The PYMNTS Mobile Order-Ahead Tracker gives an overview of the trends and activities across the mobile order-ahead space, as well as the companies that offer relevant solutions and services. Each month, the Tracker's News and Trends section provides a comprehensive update of the latest goings-on of the major industry players, technologies and solutions fueling the consumer-driven ecosystem. This visual representation of the mobile order-ahead ecosystem explains how we organize our News and Trends.



## MOBILE ORDER-AHEAD SCORING METHODOLOGY

Companies included in the Tracker Scorecard are the top restaurants providing mobile order-ahead as an integrated offering within their operations. Providers have been scored and ranked based on three primary mobile order-ahead criteria:



### ORDERING CHANNELS

How orders can be placed via the app, including whether they can be made through a branded app, third-party aggregator, messenger app or voice-activated app



### LOYALTY INTEGRATIONS

How customers can access their loyalty or rewards program accounts via a business' mobile app



### APP USAGE

How many people interact with the app, including usage penetration rates, the number of active monthly users and the average session duration in seconds



# PROVIDER DIRECTORY

## Third-Party Aggregator Apps:



## SDKs Enabling Branded Order-Ahead Apps:



## Middleware Examples (Connecting Ordering Channels to POS):



## Demand Side: QSR Branded Order-Ahead Apps



# TOP TEN MOBILE ORDER-AHEAD PROVIDERS

This month's provider directory assesses 77 leading players in the space and scores them based on their mobile ordering apps' features and adoption levels.

Scoring factors in loyalty and rewards program integrations, the number of active users each month and the average time users spend on the app. Ordering channel options, including whether customers can order by voice and whether orders are placed through a branded app or a third-party aggregator, are also important.

## STARBUCKS

Starbucks remains in the top mobile order-ahead slot, with the international coffee chain's mobile app and features retaining their popularity.

## DOMINO'S PIZZA

After a short score dip last month, Domino's has reclaimed its second-place position, boosting its score from last month's low of 83 to a solid 94.

## CHICK-FIL-A

Down a bit from its second-place spot last month, Chick-fil-A is still the third-most popular QSR on the list, though a little further away from Starbucks with its current score of 90.



## Scorecard

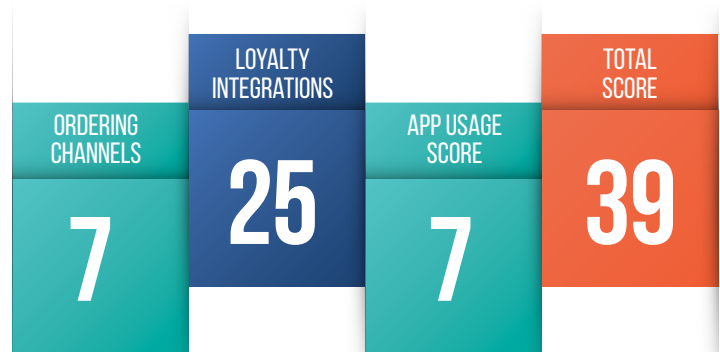
Companies are organized in alphabetical order.



### APPLEBEE'S

Launch of mobile order service date: *April 2016*

The Applebee's app allows customers to order and pay ahead. They can also create accounts to save favorite orders and earn loyalty points.



### ARGO TEA

Launch of mobile order service date: *November 2014*

Argo Tea's app enables customers to preorder and prepay for purchases. It allows customers to scan mobile devices to pay at the counter when picking up their orders, and offers rewards and loyalty features including perks for every 10 visits and credit for downloading the app.

# Scorecard

Companies are organized in alphabetical order.



## BJ'S RESTAURANT & BREWHOUSE

Launch of mobile order service date: *June 2014*

The BJ's mobile app allows customers to order ahead for takeout or dine-in, and offers split-the-bill features for group orders.



## BLAZE PIZZA

Launch of mobile order service date: *March 2016*

The Blaze Pizza app enables guests to order and pay from smartphones and earn rewards including free meals. The app also provides online order histories, reordering capabilities and a nutrition calculator.

# Scorecard

Companies are organized in alphabetical order.



## BURGER KING

Launch of mobile order service date: May 2016

The Burger King app is piloting an order-ahead tool via Facebook’s Messenger chatbot. The service would allow customers to place meal orders, select pickup locations and pay for purchases.



## CALIFORNIA PIZZA KITCHEN

Launch of mobile order service date: February 2017

The CPK Rewards app allows guests to order and pay from their phones, and earn rewards they can spend at participating locations.

## Scorecard

Companies are organized in alphabetical order.



### CAPRIOTTI'S

Launch of mobile order service date: *June 2015*

Capriotti's app enables customers to place and pay for orders. It is integrated with the company's CAPAddicts Rewards Program and features a store locator.



### CAVA GRILL

Launch of mobile order service date: *November 2013*

The CAVA app enables customers to view the restaurant's full menu, customize dishes, pay in-app and order in advance.

## Scorecard

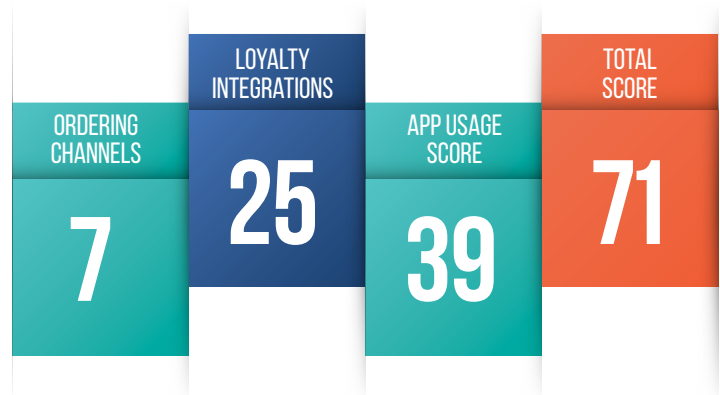
Companies are organized in alphabetical order.



### CHICK-FIL-A

Launch of mobile order service date: *June 2016*

The Chick-fil-A app allows guests to customize their orders, pay in advance and skip lines when picking up their meal. It also offers a new rewards program and allows customers to save and reorder favorite items.



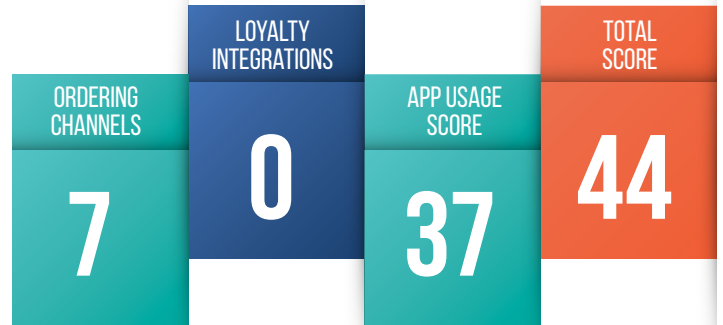
### CHILI'S

Launch of mobile order service date: *September 2011*

The Chili's app enables customers to find the nearest restaurant, put their names on seating wait lists and order meals to-go. It also saves previous orders and integrates with the My Chili's Rewards program.

# Scorecard

Companies are organized in alphabetical order.



## CHIPOTLE MEXICAN GRILL

Launch of mobile order service date: *January 2009*

The Chipotle app allows iOS and Android users to place orders and pay for them. It also enables users to find nearby restaurants, see menu and nutrition information and access recent orders.



## CHOP'T

Launch of mobile order service date: *November 2016*

The Chop't app allows customers to place orders in advance to be picked up in-store, earning rewards. It shows the nearest restaurant and displays nutritional and allergen information about menu items.



## Scorecard

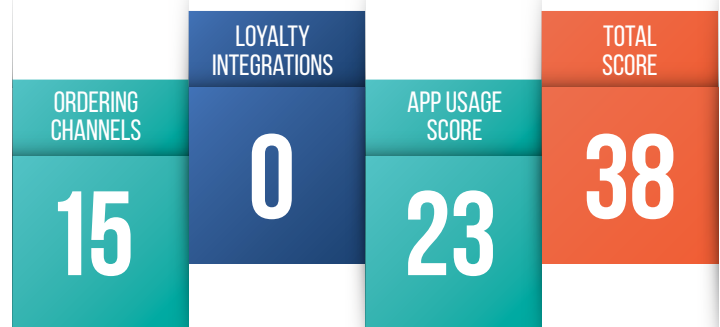
Companies are organized in alphabetical order.



### COSTA VIDA

Launch of mobile order service date: *November 2015*

The Costa Vida app features order-ahead and rewards capabilities, displays special offers and encourages users to purchase gift cards for friends.



### DENNY'S

Launch of mobile order service date: *May 2017*

The Denny's app allows customers to place orders for takeout or delivery, and they can be tracked and are saved together with payment information. The solution also displays nutritional information.

# Scorecard

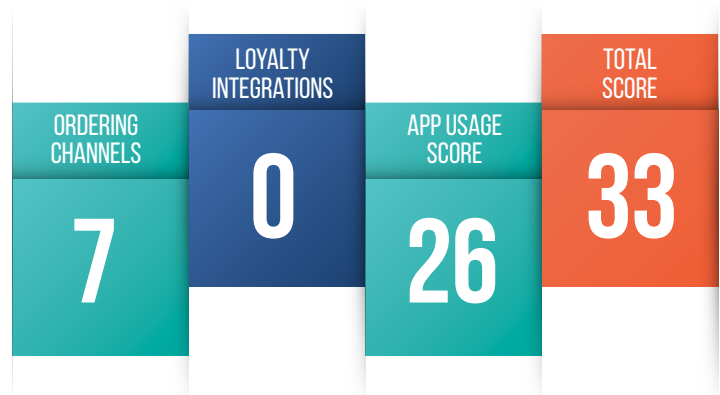
Companies are organized in alphabetical order.



## DOMINO'S PIZZA

Launch of mobile order service date: February 2012

The Domino's Pizza app enables customers to order and pay in English and Spanish, and earn rewards for purchasing. It connects with Ford Sync to track orders, and customers can place them on the go with Apple Watch or Pebble smartwatch. iPhone users can also access a voice-ordering assistant.



## DONATOS PIZZA

Launch of mobile order service date: January 2017

The Donatos Pizza app allows customers to place orders and retrieve past order information.

# Scorecard

Companies are organized in alphabetical order.



## DUNKIN' DONUTS

Launch of mobile order service date: August 2012

The Dunkin' app enables order-ahead, gives users free beverages on special occasions and integrates with the DD Card, the Dunkin' prepaid card.



## EL POLLO LOCO

Launch of mobile order service date: December 2016

The El Pollo Loco app allows customers to place and customize orders, choose whether to pick up or receive orders via delivery and pay in advance. Customers can also earn reward points and save their order histories.

# Scorecard

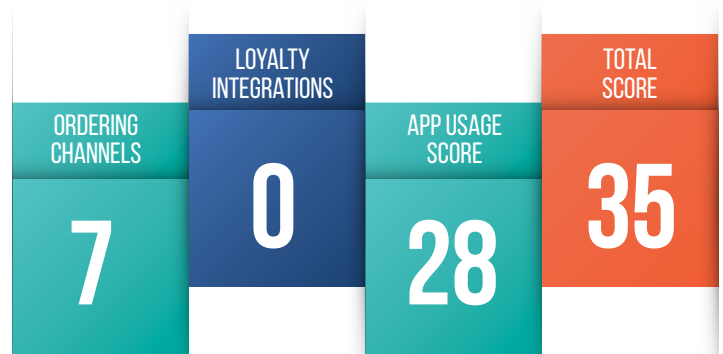
Companies are organized in alphabetical order.



## FIREHOUSE SUBS

Launch of mobile order service date: August 2015

The Firehouse Subs App allows customers to order online, find locations and earn rewards. Firehouse Rewards, the restaurant’s digital loyalty program, is available at nearly all U.S. locations.



## FIVE GUYS

Launch of mobile order service date: August 2011

The Five Guys Burgers & Fries app was developed by food ordering platform Olo, and it allows mobile ordering and order history capabilities, among other features.

# Scorecard

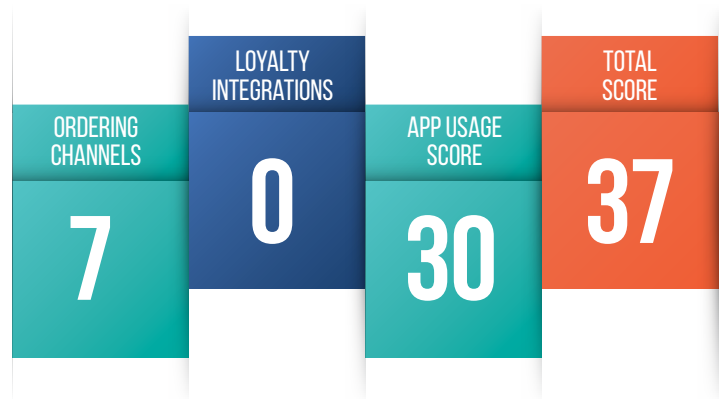
Companies are organized in alphabetical order.



## FREEBIRDS

Launch of mobile order service date: June 2016

The Freebirds Restaurant app enables customers to place orders and pay via digital gift cards. They can also scan receipts to earn rewards.



## HUNGRY HOWIE'S PIZZA

Launch of mobile order service date: January 2015

The Hungry Howie's Pizza app allows customers to place and pay for orders and save payment methods for future use. Users can also create profiles, save orders and reorder past purchases.

## Scorecard

Companies are organized in alphabetical order.



### JAMBA JUICE

Launch of mobile order service date: August 2015

The Jamba Juice app helps guests skip lines by enabling them to order and pay in advance. Users can save their preferred stores, earn reward points on their purchases and reorder from stored recent orders.



### JERSEY MIKE'S

Launch of mobile order service date: April 2014

The Jersey Mike's app, created in partnership with Splick.it and available via both Android and iOS, allows customers to locate Jersey Mike's restaurants, choose orders from the full menu, pay ahead and store favorite items for easy return ordering.

# Scorecard

Companies are organized in alphabetical order.



## JIMMY JOHN'S

Launch of mobile order service date: December 2014

The Jimmy John's Sandwiches app allows patrons to order food and pick it up from the closest Jimmy John's location. Customers who sign in with the app can save their order information for future purchases.



## LA MADELEINE

Launch of mobile order service date: February 2016

The la Madeleine app allows customers to make orders, pay for them and earn rewards. It also enables customers to find the closest restaurant location and view the restaurant's menu.

# Scorecard

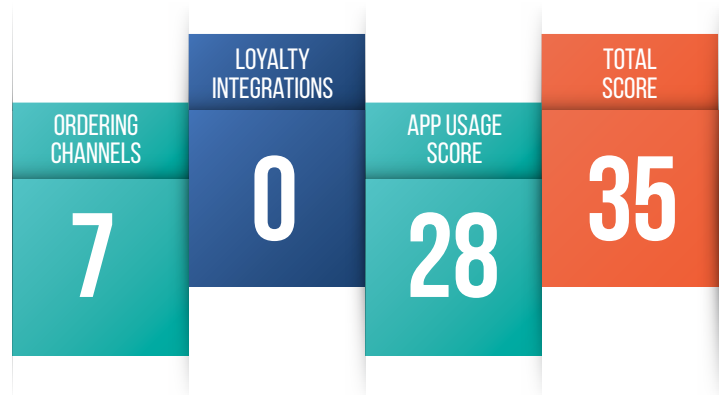
Companies are organized in alphabetical order.



## LE PAIN QUOTIDIEN

Launch of mobile order service date: *June 2015*

The LPQ app allows diners to order and pay for food from their phones. It also enables them to pay their bills by scanning bar codes, as well as earn rewards points for purchases and discounts for referring friends.



## MCALISTER'S DELI

Launch of mobile order service date: *May 2017*

The McAlister's Deli app allows customers to place customized orders, shows nearby locations and displays special offers.



# Scorecard

Companies are organized in alphabetical order.



## MCDONALD'S

Launch of mobile order service date: August 2015

The McDonald's app allows customers to place and pay for mobile food orders. Users can save purchases for reordering, access exclusive discounts and find locations.



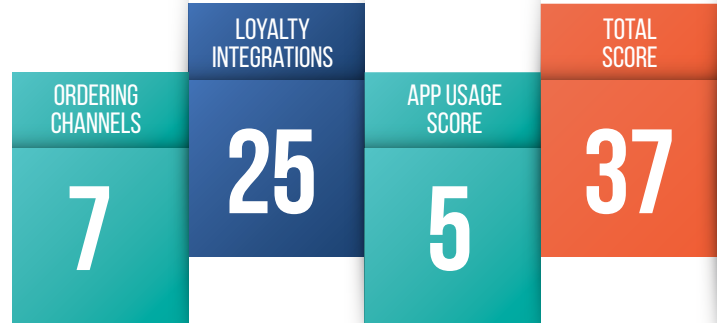
## MOE'S SOUTHWEST GRILL

Launch of mobile order service date: April 2012

The Moe's Rockin' Rewards app allows customers to place and pay for orders as well as earn rewards points. It also enables customers to find the nearest restaurant location.

## Scorecard

Companies are organized in alphabetical order.



### MOOYAH

Launch of mobile order service date: May 2014

The MOOYAH Rewards app allows customers to place and pay for orders in advance. It also integrates with the MOOYAH Rewards program, a loyalty offering based on points obtained by scanning receipts.



### NOON MEDITERRANEAN

Launch of mobile order service date: November 2016

The Noon Rewards app allows guests to order items and pay for them in advance. They can also earn reward points, including \$9 for every \$99 spent, and receive exclusive discounts.

# Scorecard

Companies are organized in alphabetical order.



## PANERA BREAD

Launch of mobile order service date: April 2014

The Panera Bread app is designed to reduce wait times and speed service. It encompasses digital ordering, payments, operations and a revamped guest experience, whether customers are eating in or ordering to go. It also allows for customized menus and use of the MyPanera loyalty program.



## PAPA JOHN'S PIZZA

Launch of mobile order service date: December 2010

The Papa John's Pizza app allows customers to choose between delivery and carryout and features special offers. Users can also create accounts to save orders and earn reward points, and the app also provides information on nearby locations.

# Scorecard

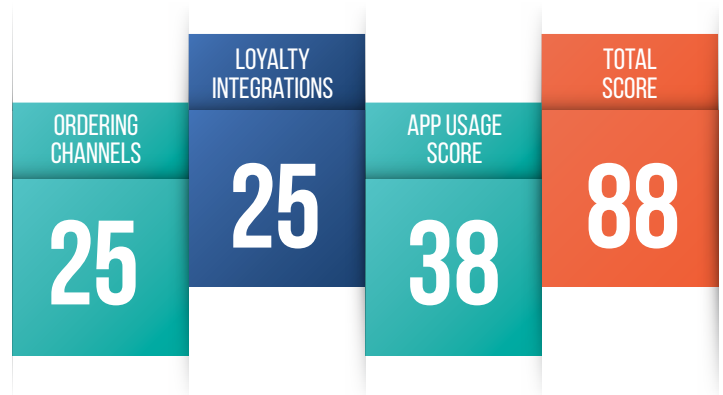
Companies are organized in alphabetical order.



## PEI WEI

Launch of mobile order service date: *September 2016*

The Pei Wei Rewards app lets customers order and pay for meals in advance, saves order history, allows access to Pei Wei's rewards program and displays special offers.



## PIZZA HUT

Launch of mobile order service date: *August 2009*

The Pizza Hut app allows orders from a full and customizable menu, helping customers find local deals and the closest stores. It also allows them to pay directly from the app and accepts voice orders.

## Scorecard

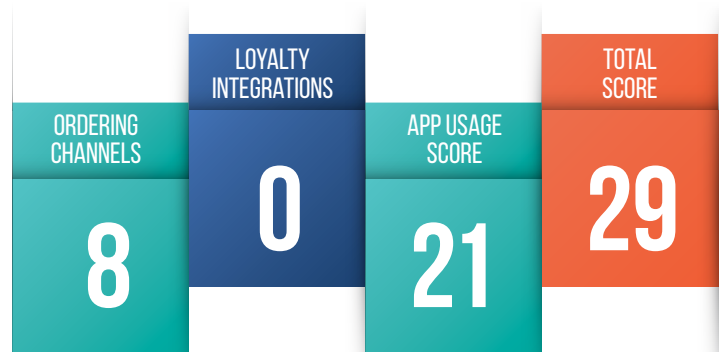
Companies are organized in alphabetical order.



### PIZZAREV

Launch of mobile order service date: *November 2016*

The PizzaRev app enables customers to place orders online while earning points for both spending and referring friends. Patrons can also use it to find the closest PizzaRev location and redeem rewards.



### PORTILLO'S

Launch of mobile order service date: *August 2016*

The Portillo's app enables patrons to place their drive-through or in-store pickup orders.

# Scorecard

Companies are organized in alphabetical order.



## POTBELLY SANDWICH SHOP

Launch of mobile order service date: *March 2017*

The Potbelly Sandwich Shop app lets patrons place orders for pickup or delivery. It also includes Potbelly Perks loyalty program, through which customers earn “smiles” that are later exchanged for meals.



## QDOBA MEXICAN EATS

Launch of mobile order service date: *December 2016*

The QDOBA Rewards app allows users to order and pay in advance, accumulate points in their reward accounts and find the nearest restaurant locations.

## Scorecard

Companies are organized in alphabetical order.



### QUIKTRIP

Launch of mobile order service date: *October 2015*

The QT app allows ordering for immediate or scheduled pickups.. It also provides exclusive deals and offers and in-app payments and customers can log in to save orders and preferences. The app also locates nearby branches for customers.



### QUIZNOS

Launch of mobile order service date: *June 2017*

The Quiznos app enables customers to place and pay for orders, as well as earn loyalty points for each purchase. It also includes a customer feedback feature and promotional offers.

# Scorecard

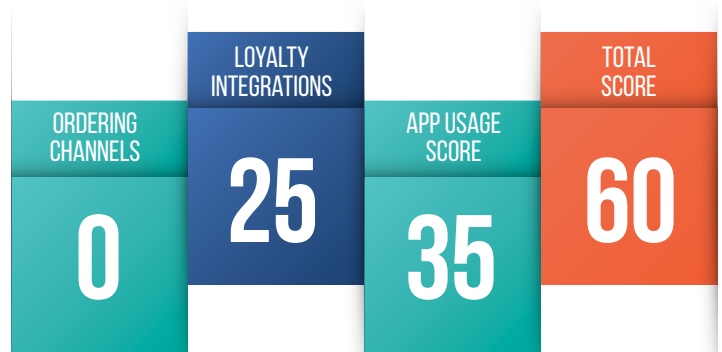
Companies are organized in alphabetical order.



## SHAKE SHACK

Launch of mobile order service date: *October 2016*

The Shake Shack app enables customers to place orders in advance, create custom profiles and find restaurants based on their GPS locations.



## SHEETZ

Launch of mobile order service date: *August 2017*

The Sheetz app allows customers to order, earn loyalty points, pay with saved gift cards and view nutritional information.



# Scorecard

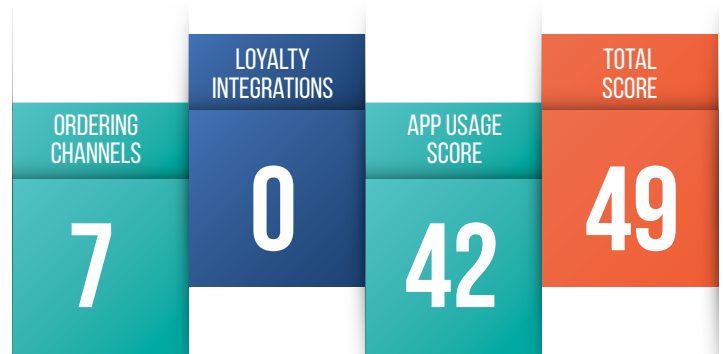
Companies are organized in alphabetical order.



## SNAP KITCHEN

Launch of mobile order service date: December 2016

Snap Kitchen’s app enables users to earn order-ahead prepared meals for pickup. Customers also can schedule meal deliveries for up to a week in advance.



## SONIC

Launch of mobile order service date: May 2014

The Sonic Drive-In app allows users to place and pay for orders in advance, earn rewards and send and receive digital gift cards.

# Scorecard

Companies are organized in alphabetical order.



## Specialty's



### SPECIALTY'S CAFÉ & BAKERY

Launch of mobile order service date: *January 2016*

The Specialty's Café & Bakery mobile app enables patrons to make orders and save payment methods and preferences. It also helps customers find the closest locations and look up nutritional information for menu items.



**Top Mobile Order-Ahead Provider**

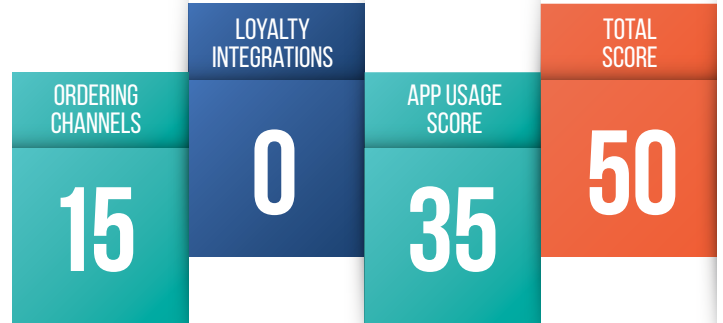
### STARBUCKS

Launch of mobile order service date: *September 2015*

The Starbucks app allows users to order drinks and food in advance and pay for them via the app. Customers can also find nearby locations, customize orders and view an estimated time frame for order pickup.

# Scorecard

Companies are organized in alphabetical order.



## SUBWAY

Launch of mobile order service date: July 2015

The Subway app enables customers to place orders 15 minutes in advance. Users can save their purchase histories and earn rewards at participating locations.



## SWEETGREEN

Launch of mobile order service date: February 2013

The sweetgreen app allows users to order from a full menu and access a rewards program.

# Scorecard

Companies are organized in alphabetical order.



## TACO BELL

Launch of mobile order service date: *October 2014*

The Taco Bell app allows users to order and pay via the app, set pickup times and use gift cards. They can also opt to receive real-time order status updates.



## TEXAS ROADHOUSE

Launch of mobile order service date: *November 2016*

The Texas Roadhouse app enables customers to reserve spots in the table queue before arriving. Users can also pay from the table and earn rewards.

# Scorecard

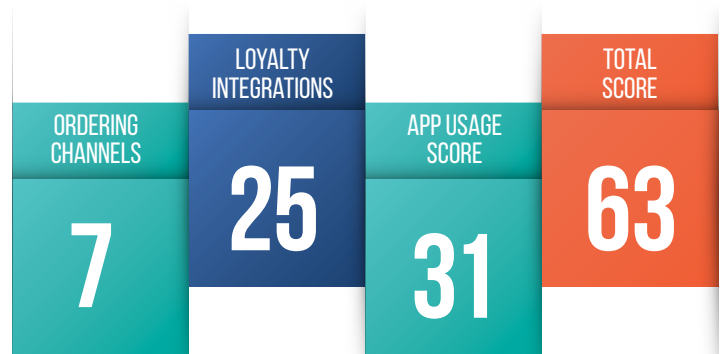
Companies are organized in alphabetical order.



## TGI FRIDAYS

Launch of mobile order service date: July 2016

The Fridays app allows patrons to order food and beverages for pickup, pay directly from the table, find nearby locations, view the menu and add, check and claim points through the chain's rewards program.



## TROPICAL SMOOTHIE CAFE

Launch of mobile order service date: March 2016

The Tropical Smoothie Cafe app enables customers to order food and link credit or debit cardsto make on-the-go payments when ordering ahead. It also offers an automatic reward credit earning feature.

# Scorecard

Companies are organized in alphabetical order.



## VEGGIE GRILL

Launch of mobile order service date: *December 2013*

The Veggie Grill Rewards app allows users to order and pay for meals, and saves payment methods for easy future purchasing. It helps patrons locate the nearest restaurants and tracks both purchases and rewards, including a \$9 reward for every \$99 spent.



## WAWA

Launch of mobile order service date: *February 2017*

The Wawa app allows Wawa Rewards members to place and pay for orders via their smartphones. It also enables customers to pay in-store with gift cards, check their balances, earn rewards and find nutritional information.

# Scorecard

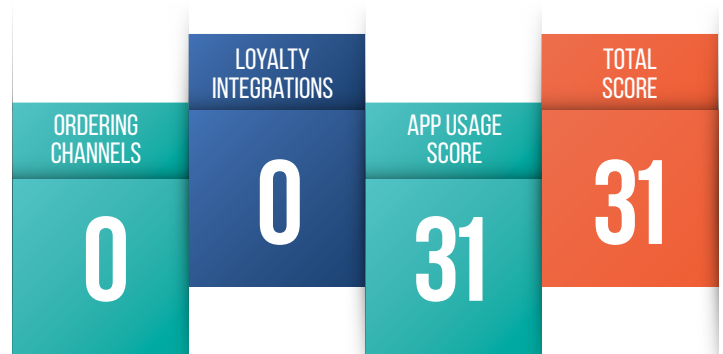
Companies are organized in alphabetical order.



## WHICH WICH

Launch of mobile order service date: *June 2015*

The Which Wich app enables customers to order and pay through the platform, and is also connected to Vibe Club Rewards, the restaurant's loyalty program.



## WHITE CASTLE

Launch of mobile order service date: *May 2012*

The White Castle app allows customers to order and pay for meals on the go, and to save their favorites for repeat purchasing.

# Scorecard

Companies are organized in alphabetical order.



## WINGSTOP

Launch of mobile order service date: August 2011

The Wingstop app allows customers to order up to a week in advance, customize their orders and find their nearest stores. They also can place them with the Wingbot virtual ordering assistant through text messages, Facebook Messenger, Twitter direct messages or Alexa voice orders.



## ZOËS KITCHEN

Launch of mobile order service date: September 2017

The Zoës Kitchen app enables customers to place orders via their mobile devices. Other features include user profiles, order histories, rewards and a store locator.



# About

## About The Tracker

The PYMNTS.com Mobile Order-Ahead Tracker is designed to give an overview of the trends and activities across the mobile order-ahead space and the companies that offer solutions and services.

## Questions? Comments? Brilliant ideas?

We hope you like the Tracker and we welcome your feedback. Drop us a line at [mobileorderahead@pymnts.com](mailto:mobileorderahead@pymnts.com).

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