



ORDER To EAT TRACKER[®]

FEATURE STORY - PAGE 9

Schlotzsky's on boosting profitability at the drive-thru

NEWS AND TRENDS - PAGE 12

KFC Canada customers can now order meals
from Colonel Sanders via AI

DEEP DIVE - PAGE 17

QSRs embrace digital drive-thru offerings
during the pandemic



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4

What's Inside

A look at the shifts QSRs are making to accommodate the surging demand for off-premise, drive-thru and third-party delivery orders

9

Feature Story

An interview with Tory Bartlett, chief customer experience officer of fast casual chain Schlotzsky's, on using digital menus and other features to improve accuracy, convenience and speed amid upticks in drive-thru orders and third-party deliveries

12

News & Trends

Recent headlines from the space, including the launch of Grubhub's member loyalty program, Grubhub+

17

Deep Dive

An in-depth look at how QSRs are shifting to drive-thru and third-party delivery channels by investing in digital tools to refine and smooth the ordering process

20

About

Information on PYMNTS.com and Paytronix

Acknowledgment

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**WHAT'S
INSIDE**

Quick-service restaurants (QSRs) across the United States are scrambling to accommodate off-premise sales as city and state governments close dine-in restaurants to slow the new coronavirus's spread. Restaurants are staying afloat by reacting quickly, improving their drive-thru operations and accommodating mobile ordering, delivery and takeout – even if they were not doing so before the pandemic.

Even fast food titans are not immune to these developments. McDonald's recently [announced](#) that it was closing dine-in and play areas at company-owned locations nationwide, stating that it would instead focus on delivery, drive-thru and takeout services. Most of its 13,150 franchise-owned restaurants are expected to follow suit.

QSRs are aiming to promote normalcy for consumers during the pandemic, and those quickly shifting to all-digital or virtual operations have opportunities to capture and maintain consumer loyalty. Investing in technologies for greater efficiency will allow them to keep operating during the outbreak and in the future.

AROUND THE ORDER TO EAT LANDSCAPE

Many QSR and restaurant operators realize there are big benefits to providing straightforward, easy-to-read digital menu boards and self-serve technologies that speed ordering and improve accuracy. Fifty-six percent of customers in a recent [study](#) said menu board designs influenced their ordering decisions, while 74 percent reported that easy-to-read displays were a priority.

KFC Canada is meanwhile greeting drive-thru customers with the voice of Colonel Sanders himself. The fried chicken chain [worked](#) with Amazon Web Services (AWS) to use the latter's artificial intelligence (AI)-driven text-to-speech service, Amazon Polly, to re-create the voice of KFC's famous founder. The experience also enables customers to reorder by voice.

Other players in the space are rolling out innovations to support restaurants' efforts to improve customers' experiences. Cloud-based point-of-sale (POS) software provider PAR Technology Corp. has teamed with restaurant management platform provider Brink POS and eTouchMenu, which offers digital menu solutions, to [unveil](#) a new application programming interface (API) integration. The solution aims to help restaurant clients increase efficiencies, control labor costs, generate measurable returns on investment (ROIs) and reduce customers' wait times.

Read more about these and other order to eat developments in this Tracker's News and Trends section (p. 12).

SCHLOTZSKY'S ON LEVERAGING DRIVE-THRUS DURING DINE-IN BANS

The COVID-19 pandemic is forcing most QSRs to alter their operations and close dine-in areas, but fast casual chain [Schlotzsky's](#) has been focusing on drive-thru service since before the outbreak began. In this month's Feature Story (p. 9), Tory Bartlett, Schlotzsky's chief customer experience officer, explains how the restaurant chain is refining its digital menu boards and other tools to improve speed and efficiency at its drive-thrus.

DEEP DIVE: QSRs TURN TO DIGITIZING THE DRIVE-THRU

Drive-thru service represented [70 percent](#) of QSRs' sales in 2018, and that share is likely to improve or at least hold steady during the COVID-19 pandemic. This indicates that brands have good reason to focus and capitalize on off-premise dining options, as those that dedicate time and digital technology resources to their drive-thru operations can achieve greater efficiency while putting customers' minds at ease. This Tracker's Deep Dive (p. 17) reveals how restaurants are smoothing their drive-thru operations to win consumers' loyalty.



Executive INSIGHT

How will COVID-19 change how customers order and dine at restaurants in the coming years?

"A year ago, restaurants may have used takeout and delivery for maybe 13 percent of their orders, but now it's all they have. It's not enough, with year-over-year revenue down 60 percent, even for those doing well. This has left restaurants seeking ways to optimize the system for maximum profit, while simultaneously offering new services that add incremental revenue.

Once the worst of the crisis begins to lift and restaurants get going again, things will look a lot different. Ultimately, we'll end up with three groups of restaurant models. The first will shift its model to delivery-only, possibly with third-party aggregators as the delivery mechanism, which will result in an increase in kitchens located in lower-rent commercial locations and places not designed for foot traffic. The resulting concepts are likely to have different hours and fewer employees.

The second group will have the variety of traditional fast casual and QSRs, but operate more like the pizza delivery market, balancing dine-in with delivery in a near 50/50 split. They'll likely have smaller retail footprints than the current models.

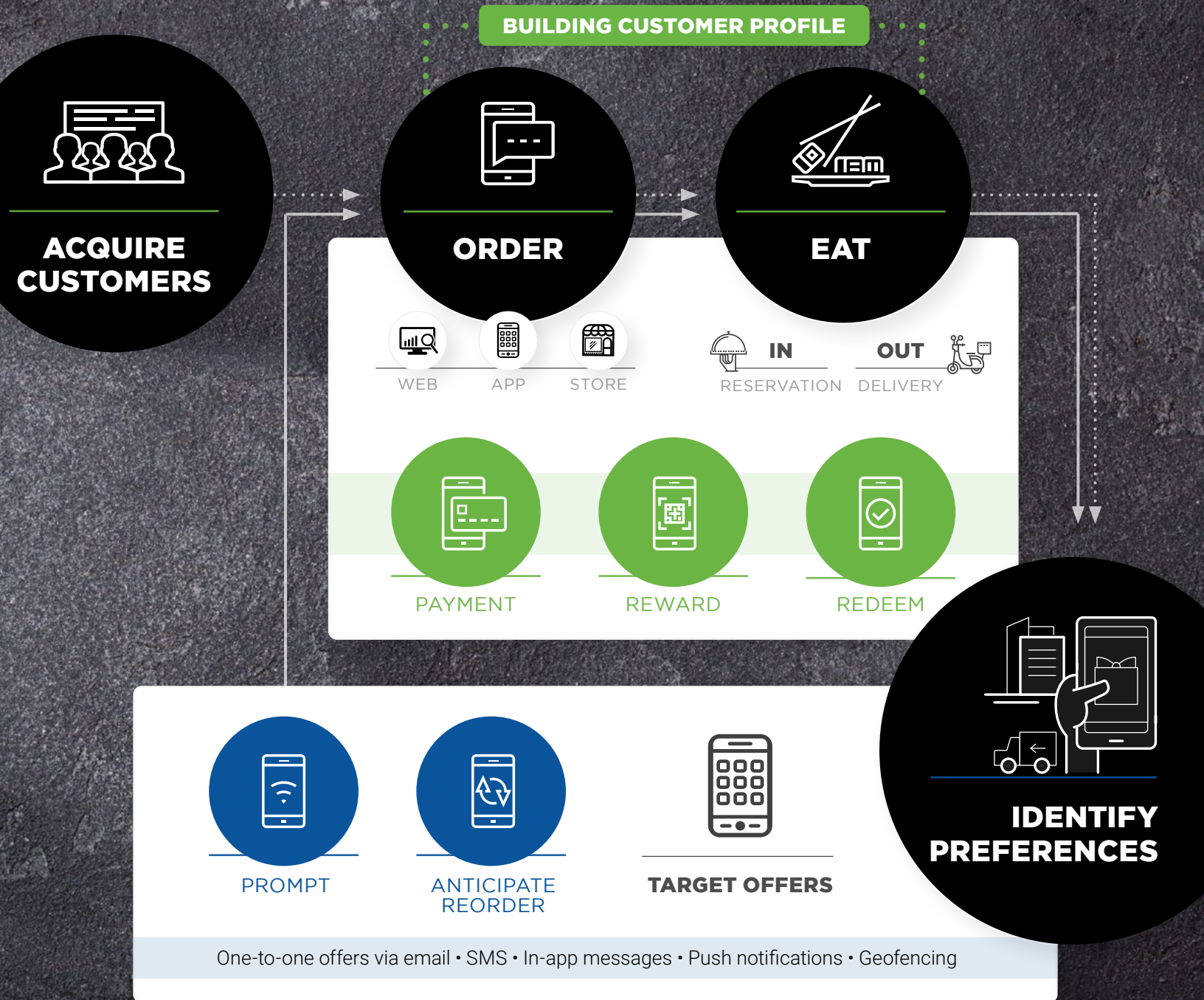
The third group, and the one we think will be the largest, will be a hybrid that may have a single kitchen and retail space, but with several brands operating out of a single location serving different delivery-only markets. A variation [could be] a central commissary that offers delivery, but also handles production for a number of smaller distribution outlets.

Ultimately, we're likely to see a lot of creativity come out of this downturn, with new concepts and ideas on the other side."

ANDREW ROBBINS

co-founder and president of [Paytronix](#)

ECOSYSTEM



17 SEC

Average amount of time Taco Bell customers saved at the drive-thru last quarter due to streamlined menu boards



56%

Portion of customers who say they are influenced by drive-thru digital menu boards



300%

Increase in off-premise and delivery orders



55%

Maximum share of drive-thru operations that suggest menu items to customers despite not focusing on personalization



70%

Share of U.S. QSRs' total sales made via drive-thrus in 2018



**FIVE
FAST
FACTS**

**FEATURE
STORY**



Schlotzsky's On Boosting Profitability At The Drive-Thru

COVID-19 is rewriting restaurants' and QSRs' operations as well as consumers' routines, and establishments are expecting to see increases in drive-thru sales as dine-in areas close. Just [20 percent](#) of U.S. restaurants offer drive-thru service, however, giving the small share of players that have already entered the market a make-or-break opportunity. This is particularly timely because 39 percent of consumers said in 2019 that they received food at drive-thrus more often than they did the year before.

Atlanta, Georgia-headquartered fast casual restaurant chain [Schlotzsky's](#) is closely following this upward trend. The company, which specializes in serving soups, salads and sandwiches, reported an increase in drive-thru business, third-party deliveries and to-go pickup orders within the past 18 months. Consumers' rapidly changing preferences are keeping the company on its toes, however.

"What we're seeing in that trend is a concern [that] we make sure our operations are providing offerings that can grow with that trend," said Tory Bartlett,

Schlotzsky's chief customer experience officer, in a recent interview with PYMNTS.

Bartlett said the eatery recently began testing two drive-thru prototypes it aims to roll out at some of its 350 nationwide franchise locations. One concept spot, located in Austin, Texas, ditches dine-in seating and instead offers two-sided drive-thru service from a 1,000-square-foot building. One side of the drive-thru accommodates standard orders, while the other is reserved for online order pickup and third-party delivery drivers who pull up, identify themselves and receive their food when they arrive at the window.

Schlotzsky's is currently leveraging third-party order aggregator teams for its deliveries, but Bartlett said the chain plans to eventually manage such operations through its own platform.

ADJUSTING MENUS FOR THE DRIVE-THRU

Schlotzsky's management team is carefully monitoring how best to package drive-thru orders, as some items

will retain their temperature better than others once they are taken off-premise.

“We are understanding that more and more people are not going to be eating the food within two or three minutes of preparing it, so we’re making sure everything carries and serves itself representing the brand well,” Bartlett explained. “We know people are going to eat it 30 minutes to up to an hour later.”

Custom pizzas, for example, can be out in less than four minutes and hold very well, he said. Schlotzsky’s changed menu with drive-thru orders in mind, however, removing items that would not keep well — such as flatbread pizzas that quickly lose their heat — from third-party delivery apps.

Schlotzsky’s also plans to test a digital menu board at the new Austin location in an effort to improve customer service at its drive-thrus. The board will display customers’ orders, allowing them to confirm that they are accurate.

“One of the big things is order accuracy,” Bartlett explained. “If a customer orders a Schlotzsky’s Original with no onions, the ‘no onions’ shows up on the screen so you know they sent what they ordered. Those are two big things obviously managing profitability through the drive-thru.”

SPEED, CONVENIENCE AND ACCURACY

Understanding and anticipating changing customer demographics and preferences are key to a QSR’s success. Drive-thru demographics — and customers’ desires for certain menu items — can change depending on whether they are ordering on a weekday or weekend, for example.

“On Monday through Friday, there may be one or maybe two people getting their breakfasts or lunches to go,” he said. “Then, on the weekend, it [is likely] a family or more

people in the car, so [the demographics slow] down your drive-thru time dramatically and [orders shift] to more pizzas and desserts.”

Schlotzsky’s is working to streamline its traffic flow with the help of [Delphi Display Systems](#)’ cloud-based timing solutions. The latter’s technology is designed to control service speeds and display real-time data, delivering performance metrics instantly and enabling crews to adjust their workflows to maximize efficiency. These solutions can also deliver up-to-the-minute insights comparing different locations’ order times and sales metrics, leading to improved drive-thru profitability.

“I believe Schlotzsky’s future in the next five years is going to see more significant focus on drive-thru and taking the food home or eating it in your car,” Bartlett said.

He expects dine-in experiences to be offered only in places where there is ample demand, as drive-thru options eliminate many of the construction, equipment, HVAC and other costs associated with running sit-down locations.

“We get romantic about coming into a restaurant, sitting down and getting the experience, but really, the experience is the food,” Bartlett stated. “For us, [making food] the hero is key — making sure it [has] the best quality and value. We will still build restaurants with dine-in areas, but in markets where we have a solid presence, and we will have other locations with drive-thrus only.”

Schlotzsky’s focus on drive-thru technology developments during what is expected to be a prolonged period of disruption could ultimately foster loyalty among consumers. Trends have shown that customers may not be too eager to head back into dine-in areas once the crisis is over, though.

**NEWS &
TRENDS**

Responding to COVID-19 concerns

McDONALD'S CLOSES DINING AND PLAY AREAS ACROSS THE US

Many QSRs are dramatically altering their operations to prevent COVID-19's spread, and even the industry's



largest players are making broad changes. Fast food giant McDonald's announced last month that it was [closing](#) dine-in and play sections at all corporate-owned restaurants, joining other major QSRs — including Chick-fil-A, Dunkin' and Wendy's — in moving to stem the pandemic by encouraging social distancing. The company said the closure would also apply to self-service bars and kiosks, though it is still offering drive-thru, takeout and delivery options. Franchisee locations are expected to follow suit with similar policies.

McDonald's has shifted its focus to digital innovations recently, [spending](#) \$7 billion on growth initiatives over the past three years and closing out 2019 with its best sales total in more than a decade. The company also purchased customer experience technology startup Dynamic Yield for \$300 million and installed its drive-thru system to support its digital efforts.

ONLINE ORDERING PROVIDER CHOWLY OFFERS 60-DAY TRIAL PERIOD FOR RESTAURANTS

A growing number of cities and states are working to contain COVID-19's spread by prohibiting dine-in eating at restaurants, which is particularly troublesome for eateries without drive-thru services. Restaurant operators are thus transitioning toward off-premise sales, but many need technical support and funding to do so, and third-party online ordering integrator Chowly is aiming to help them make these shifts. The company, which provides technology that feeds orders into restaurants' POS setups, recently [announced](#) a COVID-19 Relief Response program to mitigate the pandemic's effects on the industry. Chowly will waive restaurant technology setup fees and offer 60-day trial periods for a limited time to help restaurants adapt and ease their financial burdens.

CHIPOTLE'S RENAMED SECOND MAKE LINE ACCOMMODATES OFF-PREMISE ORDERS

Mexican fast casual chain Chipotle is leveraging its digital-first focus to offer specialized delivery services. Consumers can order bowls and burritos online or via mobile app, and these items are then prepared at one of the QSR's [renamed](#) second make lines, called Chipotle Delivery Kitchens. The Delivery Kitchens are expected to improve overall service speeds and accommodate off-site order growth, and employees working in them also monitor drive-thru lanes for customers picking up mobile orders.

The company recently offered a free delivery promotion for orders of \$10 or more to appeal to consumers wary of COVID-19. Orders also feature new packaging seals to assure patrons that their food has not been opened or touched during the delivery process, and customers can provide special drop-off instructions for drivers on how to best limit contact.

THIRD-PARTY DELIVERY COMPANIES OFFER CONTACTLESS OPTIONS

Some major third-party ordering platforms are [offering](#) no-contact delivery options as demand for such methods skyrockets. DoorDash, Instacart and Postmates recently announced drop-off services offering no physical contact in an effort to stymie COVID-19's spread. Postmates unveiled its no-contact delivery offerings in a [blog](#) post, detailing options that include meeting drivers at the door or curbside or having them leave orders on the doorstep. DoorDash's service allows customers to enter delivery instructions into an existing mobile app field, and they can also text delivery drivers photos of the locations where they want their food placed.

Digital upgrades

DIGITAL MENU BOARDS ARE FUELING DRIVE-THRU SALES

Many restaurants are focusing on drive-thru sales during the pandemic, and a recent [study](#) revealed that menu boards may offer the quickest route to positive ROIs. It found that 56 percent of customers said menu boards influenced their drive-thru decisions, while 74 percent reported that easy-to-read menu boards were a priority.

Many operators are streamlining their menu displays to optimize drive-thru traffic while eat-in dining areas are closed. Fast casual chain B.GOOD, for one, recently said it improved its sales by simplifying its boards' designs, which also helped staff offer faster and more efficient service. Mexican food QSR Taco Bell meanwhile announced that its recently unveiled streamlined menu boards helped it post its best quarter speed-wise in five years – it was able to shorten drive-thru waits by an average of 17 seconds.

TACO BELL LAUNCHES MEAT-FREE DIGITAL KIOSK ORDERING FEATURE

QSRs are also striving to serve the growing number of diners seeking meat-free options. Taco Bell recently [launched](#) a feature on its self-service kiosks called Veggie Mode that allows users to view only vegetarian options with a single swipe. The new feature comes amid a major menu update promoting vegetarian versions of popular menu items.

The company, a Yum! Brands subsidiary, also increased the amount of American Vegetarian Association-certified vegetarian and vegan ingredients it offers. Its new focus on catering to plant-based diets began last year, when it introduced its first vegetarian

menu. Mark King, Taco Bell's CEO, said last month that the company plans to roll out new plant-based protein options next year, which could include Beyond Meat or Impossible Foods products.

SMOKEY BONES LAUNCHES TWO DELIVERY-ONLY BRANDS

Smokey Bones Bar & Fire Grill is digitalizing its operation to expand sales. The company recently [launched](#) the Wings Experience and Burger Experience – two delivery-only ghost kitchen concepts – at 30 of its 61 locations. Smokey Bones orders placed with third-party delivery apps are prepared in the ghost kitchens or at locations designated for food prep, takeout and delivery. Ghost kitchens are essentially spaces rented to operators that allow them to produce mobile orders, and this concept would enable Smokey Bone's restaurant locations to focus on preparing meals for dine-in customers.

Loyalty program launches

GRUBHUB UNVEILS LOYALTY PROGRAM WITH DELIVERY PERKS

Online third-party delivery provider Grubhub is [experimenting](#) with a new member loyalty program it hopes will help it retain market share and maintain customer loyalty during the pandemic. It recently launched Grubhub+, a monthly subscription program that allows members to pay \$9.99 per month to receive unlimited deliveries from participating restaurants. Additional benefits include 10 percent cash back on all deliveries, customer service perks, donation matching to select charities and early access to special "perks, local events and experiences."

QDOBA PARTNERS WITH PAYTRONIX ON REWARDS PROGRAM

Fast casual Mexican food chain Qdoba is also launching a rewards [program](#), working to gain improved insights and better tailor offers to customers. Qdoba is teaming with customer engagement solutions provider Paytronix to migrate the former's rewards program onto the latter's customer resource management (CRM) platform. The chain operates 730 restaurants across the U.S. and Canada, and it is gathering loyalty data from its newly launched branded mobile app and an Olo software-based online ordering service. Customers reportedly engage with Qdoba through mobile more than any other channels, and now they can place orders and manage their rewards through the app.

PANERA BREWS LOYALTY WITH NEW COFFEE SUBSCRIPTION

Bakery and café chain Panera Bread is also pulling out all stops to earn customers, [launching](#) a subscription program offering unlimited coffee and tea to boost patronage. The \$8.99 monthly subscription, offered to MyPanera loyalty program members, aims to attract consumers complying with social distancing guidelines who are hungry for delivery and takeout options.

The program's trial lasted three months and took place at 150 Panera locations, delivering a 70 percent increase in food purchases paired with subscribers' coffee, according to CEO Niren Chaudhary. More than 75 percent of subscribers participating in the pilot redeemed their coffee and tea orders through off-premise channels such as pickup, drive-thru and delivery.

Speeding customer service

PAR TEAMS UP WITH BRINK POS, ETOUCHMENU ON NEW API INTEGRATION

Global cloud-based POS software provider PAR Technology Corp. recently [announced](#) a new API integration with Brink POS software and eTouchMenu, a digital menu solutions provider, to help restaurants increase efficiencies and boost customer service speeds. The solution will help clients control costs and generate measurable ROIs, boost their average check sizes, facilitate upselling and pairing opportunities and increase revenue with mobile app and to-go ordering. It is designed to reduce fraud and chargebacks and will enable self-service ordering via tablets and kiosks, reducing labor and providing faster and more efficient service.

KFC EMBRACES TECHNOLOGY FOR NEW VOICE AND DRIVE-THRU ORDERING EXPERIENCES

KFC Canada customers can now order and reorder meals from founder Colonel Sanders himself, thanks to text-to-speech technology. The fried chicken chain recently [announced](#) it worked with AWS' AI-driven Amazon Polly service, which turns text into lifelike speech using deep learning technologies, to offer the service. KFC says it is the first global QSR to deploy the sophisticated voice-activated technology.

KFC also recently [rolled out](#) its first four-lane, drive-thru-only restaurant in South Australia, allowing customers to prepay via the KFC mobile app or website before picking up orders at the window. Two lanes are for prepaying customers while the other two are for

traditional drive-thru ordering. The restaurant also offers a walk-up kiosk.

ORACLE RELEASES POS SYSTEMS FOR POP-UP SPOTS, FOOD TRUCKS

Software corporation Oracle is on a mission to reduce customers' wait times, and it recently [unveiled](#) workstations to help pop-up restaurants and food trucks speed their ordering processes. The company's new MICROS Workstation 625 and 655 POS systems are designed for flexible experiences and feature non-glare screens, reduced power requirements and fast employee sign-in options. The systems have larger screens for quicker, errorless entry and improved security features, as well.



**DEEP
DIVE**



How COVID-19 Is Accelerating Drive-Thru Upgrades

QSRs competing in an already-tight space have been under increasing pressure to differentiate their brands and enhance business operations at a time when industry revenues are suffering. Major brands are shuttering their dine-in areas to promote social distancing, shifting their focuses to [upgrading](#) drive-thru operations and elevating their customer service approaches. Drive-thru pickup accounted for approximately 70 percent of QSRs' sales totals in 2018, and that share is expected to hold steady or increase as more Americans stay at home. QSRs investing in their drive-thru operations stand to benefit now and in the future.

A recent [study](#) offered insights into consumers' reactions when the COVID-19 crisis began in March. It analyzed sales at eight fast food and fast casual brands across the U.S. — Burger King, Chick-fil-A, Chipotle, McDonald's, Perkins Restaurant & Bakery, Popeyes, Starbucks and TGI Friday's — finding that traffic held surprisingly steady and that some chains even saw year-over-year growth. Only TGI Friday's and Perkins, both dine-in restaurants lacking drive-thrus, posted declines over the previous years.

Demand for drive-thru options coincides with an uptick in off-premise dining, including digital ordering and

third-party delivery service. QSRs that did not offer such services before the COVID-19 crisis are now scrambling to provide no-contact options to ease customers' concerns and even promote a sense of normalcy. Doing so could allow them to engage new customers and encourage loyalty during these uncertain times.

QSRs have recently experimented with several approaches to gain competitive edges, from modifying menus with healthier choices and tinkering with loyalty programs to modernizing their restaurant layouts. The COVID-19 pandemic is in consumers' thoughts, yet companies can still personalize their services with digital offerings that limit personal contact to address customers' concerns.

Drive-thru ordering is poised for a digital transformation, with numerous innovations [emerging](#) to promote faster ordering and more efficient kitchens. About 70 percent of QSR managers see these as the primary benefits of implementing new technologies, according to PYMNTS' [Restaurant Readiness Index](#), and most believe tools that support convenient order pickup and accuracy will bolster restaurants' successes.



One new tool comes from U.S.-based AI solutions provider Valyant AI, which recently [introduced](#) a conversational AI platform for QSRs that simplifies voice ordering at kiosks. The platform also updates display boards with messages encouraging patrons to make additional purchases and provides real-time insights on customer-employee interactions.

This conversational AI-based CRM software can help QSRs refine their ordering operations as well as reduce the risk of suggesting items customers may have rejected in the past. These operators can instead rely on the insights they have gained through customer interactions to tailor their offerings. Such suggestive selling occurs less than 55 percent of the time at drive-thrus that do not prioritize personalization, according to a 2019 [study](#).

Adopting digital menu boards with vibrant images and graphics can also help QSRs capture customers' attention as well as provide more readable entries than their static counterparts. Order confirmation systems can offer timely promotions and complimentary menu items, boosting loyalty while enabling staff to ensure orders are accurate.

COVID-19 is accelerating QSRs' digital developments, and some experts [believe](#) the crisis could have lasting impacts on the food service landscape in multiple ways. The expansion of delivery offerings and pursuit of drive-thru renovations, as well as growth in digital revenues and loyalty program rollouts, are trends that may persist long after the pandemic ceases to be a threat. Analysts predict QSR operators will post only modest sales increases from the recent uptick in drive-thru service, but the push to adopt digital offerings is expected to offer long-lasting value.

ABOUT

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PAYTRONIX

Paytronix provides software-as-a-service (SaaS) customer experience management (CXM) services for restaurants. Its portfolio includes loyalty, gift and email solutions for fast-casual, fast food and quick service restaurants. Once implemented, these can be used to help establishments elevate their brand profiles. Its offerings can also be used to generate data insights to help restaurants pinpoint opportunities to improve their operations and customer engagements. The company’s platform can integrate with many widely used restaurant POS systems. For more information, visit <https://www.paytronix.com>.

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