MOBILE
ORDER-AHEAD
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MOBILE *ORDER-AHEAD*

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Quick-service restaurants (QSRs) are catching on that their operations could benefit by harnessing data analytics and artificial intelligence (AI). These technologies are becoming more critical to helping restaurants capture customer information, which can expand their sales across multiple channels as well as equip them with valuable fraud-fighting insights. Consumers appear to support these efforts, too, with a recent report revealing that 71 percent favor having QSRs and fast casual restaurants integrate AI into their business operations.

Many restaurants, including some big players, have been reluctant to implement advanced data analytics and other tools until recently, but they are finding numerous ways to apply such technologies and bring benefits to their organizations. Fast food behemoth McDonald's began investing in AI to streamline its mobile ordering efforts and give customers unique deals while also obtaining vital information about their ordering habits, for example. These efforts have helped it boost sales among app users in Japan by 30 percent.

QSRs that can gather insight about their customers and performances can pinpoint patterns and trends that can help inform their next strategic moves. These tools can also help them stamp out

both external and internal fraud, the latter of which reportedly accounts for up to 75 percent of restaurants' losses. AI and data analytics are therefore becoming invaluable tools to many QSRs looking to satisfy their customers and thwart fraudsters.

Around the mobile order-ahead space

Restaurants and other venues around the world are beginning to reopen, prompting some consumers to return to brick-and-mortar restaurants, retailers and even theme parks. Many of these venues are implementing public safety protocols to keep customers safe during the COVID-19 pandemic, with some enlisting digital technologies. Disneyland recently announced that its reopened theme park will enable more robust mobile ordering options and payment methods, for example. The move is intended to ease the minds of consumers who are still wary of physical contact that could put them at risk of infection.

Fast food chain Burger King is seeking to enhance its customer engagement with new store concepts. The QSR unveiled brick-and-mortar restaurant design plans for concept models set to launch in 2021 that will primarily leverage contactless digital and mobile technologies. Some design ideas being floated for the new models include drive-in lanes for contactless curbside meal pickup, outdoor seating features and coded lockers from which customers could retrieve their meals.

Others in the food service world are turning to predictive technologies like machine learning (ML) to streamline their operations. Online restaurant supplier Rebel Foods has tapped ML to enhance its order forecasting ability, which allows it to determine which food items — and how much of them — to deliver to specific restaurant kitchens. The company said the new order forecasting system is correct approximately 90 percent of the time, enabling it to cut down on food waste and expenses.

For more on these stories and other headlines from the mobile order-ahead space, read the Tracker's News and Trends section (p. 11).

Qdoba on navigating the new digital norm in the wake of the COVID-19 pandemic

The COVID-19 pandemic's onset caused U.S. restaurant revenues to take a hard dip in March, totaling only $30 billion, when shutdowns were ordered to curb the spread of the virus. Industry recovery slowly improved in the months that followed, however, with August sales exceeding $54 billion. Restaurants and QSRs had to quickly pivot to accommodate higher order volumes through

digital channels, with establishments such as Mexican fast casual chain Qdoba launching its curbside pickup service within mere days of the shutdown. For this month's Feature Story (p. 7), PYMNTS spoke with Adam Fox, director of digital experience and media for Qdoba, on how the company adjusted to meet the new digital normal for its customers, facilitating safe, contactless payments while warding off fraudsters looking to take advantage.

Deep Dive: How QSRs are deploying data analytics and AI to serve customers, fight fraud

QSRs are realizing that data analytics and AI are powerful tools they can use to capture customers' data and boost sales. Consumers are also backing restaurants' investments in these advanced technologies, with one report noting that 71 percent of consumers support QSRs' efforts to integrate AI into their business operations. This month's Deep Dive (p. 17) examines how data analytics and AI can help QSRs boost their mobile ordering volumes and reduce fraud.

Executive
INSIGHT

As QSRs shift away from brick-and-mortar sales and toward improving their digital offerings, how can they ensure that there are no security gaps that fraudsters can target?

"Historically, quick-service restaurant payment transactions have almost entirely been card-present interactions, with customers physically handing over their credit cards at the point of sale. With digital transformation, payments are going card-not-present, whether it be an online order for delivery, mobile order-ahead or even ordering from within the restaurant via a phone app or other method.

That shift to card-not-present also shifts the liability. Chargebacks are a risk because fraudsters like to test stolen card information with businesses that may be accustomed to multiple small transactions in a row and that also don't have time for a manual review process. AI-driven fraud prevention built on a global data network can protect against criminal fraud, but friendly fraud is also an issue that may be new to QSRs.

Friendly fraud occurs when legitimate customers dispute transactions. QSRs could be targets of friendly fraud if customers don't recognize the billing codes on their credit card statements, they didn't realize a spouse or child made an online purchase with a shared card or maybe their orders didn't meet their expectations and it seemed like an easy way to get a refund.

As QSRs shift from brick-and-mortar sales to digital sales, preventing chargebacks and disputes in real time, as they happen, is critical. Kount's new solution, in partnership with Verifi, a Visa Solution, helps businesses prevent chargebacks both before the transaction ever goes through and after, as soon as a dispute begins."

SCOTT ADAMS
vice president of friendly fraud at Kount

FIVE FAST FACTS

428%
Year-over-year increase in digital food ordering in June for customers ages 65 and older

90%
Accuracy of Rebel Foods' order forecasting after tapping an ML algorithm

75%
Portion of restaurants' losses caused by employee fraud

$4
Minimum amount that fraudsters can spend to obtain a consumer's QSR app credentials

30%
Increase in sales for McDonald's app users in Japan due to data analytics-driven initiatives

How Qdoba **Meets Mobile Ordering Preferences, Curbs False Chargebacks** On The Road To Industry Recovery

Restaurateurs seeking a bright spot since the COVID-19 pandemic's onset may have found one. Restaurant revenues have grown by 82 percent over the last four months in the U.S., according to the National Restaurant Association. Restaurant tabs totaled just $30 billion in March — less than half the amount customers spent in January — when shutdowns were ordered to prevent the virus from spreading. Sales have risen in the months since, however, as eateries reopened with limited seating.

The tentative recovery appears to be steady: May saw earnings increase to $39 billion, consumers ventured out to greet the warmer weather in June to boost gains to $50 billion, July returns swelled to $52 billion and August saw yields exceed $54 billion. These transactions won't fill the $185 billion hole the pandemic dug, but they are a start.

Reconfiguring operations to accommodate off-premises orders has breathed life into the struggling restaurant sector, with restaurants quickly launching takeout, curbside pickup, delivery and drive-thru services. Seven in 10 operators reported that such digital transactions represent a higher portion of their total business compared to pre-pandemic levels, according to a survey of 3,500 restaurant operators conducted between August 26 and September 1. Sixty-seven percent

of restaurant operators have added curbside pickup since the pandemic's onset, including Mexican fast casual chain Qdoba.

The San Diego-based chain quickly launched its curbside pickup model and has responded to customers' changing ordering preferences as well as chargebacks, said Adam Fox, director of digital experience and media for Qdoba. The company also had to adjust its payment offerings to facilitate safer, contactless methods.

Online orders comprised 15 percent of Qdoba's sales prior to the pandemic. Digital sales peaked at 60 percent during the height of the pandemic, however, Fox said. That percentage has been reduced over the last few months as dine-in and carryout has returned, but remains well above pre-pandemic levels.

"Even as guests come back into the restaurant to order and carry out, they are looking for that contactless experience," Fox said in a recent interview with PYMNTS. "We've marshaled a lot of resources across the organization to support that."

Meeting demand for contactless

Qdoba has more than 730 locations throughout the U.S. and Canada, but it implemented curbside pickup within just four days of the mid-March shutdown.

The chain, like many restaurant operators, also had to contend nearly simultaneously with customers' evolving ordering preferences now that they were primarily dining at home. The biggest shift that coincided with pickup was customers' migration to digital, leading to the company's efforts to keep up.

"We put significant energy behind growing our own digital channels, which would include our website, mobile app and now delivery," Fox said.

There has also been a dramatic move across the space toward offering contactless payments. Qdoba harnesses tools from a mobile payment platform provider, Fox explained, and the company changed online ordering and loyalty providers earlier this year to build a seamless platform. He noted that more guests have created mobile accounts to access order histories, reorder past meals and participate in the rewards program since the company made the switch.

"Now we are continually able to respond to changes that are happening in the industry, making sure we are staying on top of what consumer preferences are and making sure we are able to respond to [them]," he said.

Fox expects mobile ordering and payments will continue to play a huge role for industry revenues as

fast casual and quick-service restaurants gradually reopen to customers at fuller capacity. COVID-19 may have accelerated the move to digital ordering and payments, he observed, but it was already happening well before the pandemic hit.

"In a business like ours, where we have a dine-in component and a very large carryout business, we expect guests to continue to use their mobile devices from an in-restaurant standpoint," he said. "The contactless trend will continue even as guests come back into the restaurant."

Identifying chargeback fraud

With consumers' massive shift to ordering through digital channels comes an unfortunate — yet unavoidable — uptick in fraud. Qdoba selects its security vendors after performing a thorough review, Fox said, adding that the company continues to evaluate its partners' practices as time goes on.

"Given that security is an ever-evolving part of the industry and there are bad actors that are always out there looking to do new things, we are always looking at how to stay one step ahead with the partners in our ecosystem," he said.

Fox takes the view that chargebacks are simply the cost of doing business in the digital space, where cards are not present. He said the company works with its online ordering provider to flag suspicious transactions that show up as chargebacks.

"We are able to flag those transactions as fraudulent so that if those guests continue to order and … to fraudulently charge back transactions, we are able to identify them," he said.

Qdoba's mix of corporate- and franchise-owned stores has made the company very conscious of the fact that those chargebacks, in many cases, hit franchisees' pockets directly.

"We have remained very focused on that, and I think, with the tools at our disposal, we have been able to keep chargebacks at a very low, acceptable level," Fox said.

He also noted that the company has not received much feedback on chargebacks.

"That's a good thing," he noted. "People don't call you to report that they don't have chargebacks. So we've seen the fact that the overall volume is low as a positive sign."

Ramping up off-premises sales through a combination of digital channels and secure contactless payments appears to be the key to success as restaurants cope with the impact of the pandemic. Most states still have limited seating and some customers may be nervous to dine in. Customers' healthy appetites for curbside pickup and mobile order-ahead are likely to keep QSRs' sales cooking, however.

THE PANDEMIC SHIFTS ORDERING BEHAVIORS

COVID-19 pandemic pushes new crop of users to mobile order-ahead

The COVID-19 pandemic has pushed a whole new category of customers into adopting mobile ordering. Many digitally reluctant shoppers who held out on trying the apps are now actively downloading them as health concerns prompt them to purchase takeout and delivery to avoid transacting in person or waiting in lines where they might risk exposure. Restaurants and QSRs would normally need to invest heavily in advertising campaigns to win over so many new app users, but public health needs are naturally changing customers' buying behaviors.

This trend is evident from a recent study, which found that twice as many shoppers ranked ordering capabilities as the most important part of a restaurant app than those who put reward features first. This reflects a shift in consumer priorities as both functionalities were equally valued prior to the pandemic.

The rise in digital purchasing channels is offering some reprieve to the suffering restaurant industry, with mobile ordering volumes making up the vast majority of sales at companies like Domino's. New app users are not the only ones boosting mobile ordering, either, with longtime mobile customers also increasing their use.

Digital ordering explodes in popularity for customers over the age of 65

Food delivery services are more popular than ever as the COVID-19 pandemic has made dining in public a health risk. A recent study from NPD group found that digital orders in the U.S. increased by 135 percent year over year in June, though this increase was not evenly divided among generations. Consumers over 65 years of age ordered food digitally 428 percent more often while diners older than 55 years did so 200 percent more often. This figure may seem surprising, considering that older individuals are typically less likely to adopt new technology, but such individuals are also at the highest risk of infection. Ninety-five percent of COVID-19 fatalities occur in those older than 60, which has resulted in seniors looking for safe ways to enjoy restaurant meals.

UNIVERSITIES DEBUT MOBILE ORDER-AHEAD

Fairleigh Dickinson University debuts campus mobile ordering app

Universities are also turning to mobile ordering services for safety purposes as they work to bring students back to campus. New Jersey-based Fairleigh Dickinson University (FDU) recently partnered with higher education payments platform provider Transact Campus to launch a new mobile order-ahead app for students as part of this effort. The app enables students on two FDU campuses to preorder and pay for food from campus dining halls and eateries on a single platform as well as make purchases at bookstore and retail locations.

The university is permitting students to eat their meals in the dining halls — rather than having them take the items back to their dorms — so long as social distancing protocols can be maintained, and the new ordering solution is intended to help enforce this. The app includes features for tracking the quantity of orders that have been placed and capping new orders once dining hall capacity limits have been hit. It also features the ability to alert students once their meals are ready to help them avoid lines.

Penn State launches mobile order-ahead app featuring 35 eateries

Penn State University is another higher education institution that recently debuted an order-ahead app to serve students and staff. The offering is intended to enable contactless purchasing for meals and snacks at 35 participating locations around the campus. Users can preselect pickup times or request their items be made available as soon as possible and the app supports payment via credit cards, university meal plans and students' university-designated "Lion Cash" funds. The platform also gives users access to their order histories for quick reordering as well as meal budgeting features. This mobile ordering app reportedly has been in the works since 2018 and was originally intended to be trialed at just one residency hall. The onset of the pandemic inspired administrators to instead release the offering to 10 residential campuses. The university plans to add more eateries and convenience stores to the app over the course of this academic year.

Jones AT&T Stadium offers concessions-ordering app to football fans

Colleges and universities are concerned not only with helping students get their daily dining needs met safely but also with finding ways to feed event attendees in convenient, low-risk ways. Texas Tech University is among the institutions that have been

permitting football games to take place and fans to watch live from the stadiums. The school is making limited numbers of tickets available to those wishing to attend its Red Raiders football games at Jones

AT&T Stadium, and administrators are also looking to reduce likelihoods of crowding and lines by offering mobile ordering for concessions. Customers will be able to place concession orders for pickup at any of eight locations and will not be able to have items delivered to their seats. The new ordering app is available for both iOS and Android devices.

RECENT EXPANSIONS

Disneyland to accelerate support for mobile order-ahead in its themed restaurants

Consumers are tentatively returning to brick-and-mortar restaurants, retail stores and even theme parks as reopening phases are rolled out. Many are doing so with upgraded public health measures put into place for the safety of consumers and staff members, but that is not the only change being made. Disneyland has announced that its newly reopened theme park destinations will include a higher focus on and availability of mobile ordering at the restaurants dotted around the parks, for example.

This will include more support for consumers making contactless payments with mobile wallets such as Apple Pay and Google Pay as well as enabling customers to make food orders via their mobile phones for select eateries. Expanding its adoption of mobile order-ahead as well as contactless payments will help maintain social distancing and other

health measures needed to keep the park operational for a greater volume of guests.

Starbucks to expand curbside pickup to 2,000 more locations

Curbside pickup is exploding in popularity amid the COVID-19 pandemic, allowing customers to have restaurant workers place their orders directly into their cars and minimizing person-to-person contact and time spent indoors. Coffee chain giant Starbucks recently hopped aboard the curbside train, with 800 of its U.S. store locations offering this service. The company plans to expand the service to 2,000 more locations in the coming months, according to chief financial officer Pat Grismer, as well as deploy handheld point-of-sale (POS) systems at its drive-thrus.

The expansion comes at a time when Starbucks, along with many of its competitors, is facing massive declines in sales due to the pandemic. Starbucks is not expected to recover from this year's losses for another six months and 3 percent of its company-owned locations have already closed. The closed locations are largely located in metropolitan business districts, which have become ghost towns while the majority of American office workers have worked remotely for the past six months.

LEVERAGING TECHNOLOGIES

Burger King banks on mobile with new restaurant designs

Another entity seeking to enhance its customer engagement and loyalty as brick-and-mortar recovers is fast food chain Burger King. The company is consolidating plans to unveil two new restaurant designs in 2021, both of which will make major use of digital and mobile technologies. Order placements and payments will be entirely contactless within these locations, according to the burger chain, and each store will feature dedicated indoor areas for customers to pick up mobile orders as well as outdoor spaces for curbside pickup.

The new touchless restaurants will also allow customers to order by mobile app from their cars when parked outside the locations. Users can order their food via the QSR's mobile app before scanning QR codes placed within their parking spaces. Their orders will then be delivered directly to their cars without the need for them to set foot inside the restaurant. The aim is to take advantage of the growing use of smartphones and other connected devices at QSRs to better satisfy customers.

Rebel Foods achieves 90 percent accuracy in order forecasting

Other players in the food service industry are turning to predictive technologies, such as ML, to help them

keep up with the digital times. Online restaurant company Rebel Foods is tapping ML to enhance its order forecasting ability to essentially determine how much and which foods should be delivered to which kitchens, helping to reduce food waste. Its order forecasting is correct approximately 90 percent of the time, according to company statements. Rebel Foods operates about 3,000 restaurants in global markets, though many of its affiliate brands are clustered in its home country of India.

The use of such automated tools can help restaurants utilize their inventories more efficiently — a growing necessity in an environment in which food orders are being submitted more frequently online. Having the proper food on hand — and more importantly, not seeing ingredients go to waste — can help to reduce costs and keep these online orders moving to customers at higher speeds.

DoorDash fends off allegations of redirecting business away from non-partner restaurants

Third-party delivery platforms also regularly use ML or data analytics to direct consumers to participating restaurants or to optimize search results, but how exactly these results are generated can be shrouded in mystery for both consumers and the restaurants making use of the platforms. This lack of transparency can strain relationships between third-party services and eateries as can be seen in one recent case involving delivery service DoorDash. The platform is currently facing a lawsuit filed by St. Louis, California-based restaurant Lona's Lil Eats that alleges DoorDash is using "deceptive information" to send potential customers to its paying partner restaurants, while non-partner entities, such as Lona's, show up as closed or too far for delivery on the DoorDash site.

DoorDash is claiming this mistake was due to "technological" issues in tracking restaurant statuses. The lawsuit is still ongoing and represents one of several related allegations that have cropped up in recent years. Fellow third-party delivery platform Postmates has faced similar legal quandaries. These lawsuits have prompted regulatory action in the state of California, with regulators passing a law that requires such platforms to have written agreements with restaurants before they are listed.

The Power Of Data Analytics And AI For QSRs In A Complex Ordering Environment

Harnessing consumers' digital information is critical to the success of any business, and data analytics and AI can be especially powerful tools. Numerous QSRs have deployed these technologies to support their operations, tailor their customer service approaches and even boost sales, but many players, including several big names, have been reluctant to invest in such innovations.

Fast food giant McDonald's was not interested in utilizing AI or data analytics until it noticed that many of its competitors were benefiting from the technologies. This revelation prompted the company to launch several innovations, including digital menus that change based on real-time data analysis. The alteration led to a 3 percent increase in sales in Canada, the chain said.

Use of the McDonald's app is also helping the company capture valuable customer data, including which restaurant locations consumers visit and when, how often they go and whether they prefer drive-thrus or dine-in experiences. Having such data allows the restaurant to offer suggestions to guests and promote deals, with such methods leading to a more than 30 percent increase in sales for customers in Japan who use the app.

McDonald's use of these technologies demonstrates just a few of the ways in which restaurants are leveraging the data at their disposal to gain greater customer insights. This month's Deep Dive explores how data analytics and AI can help QSRs optimize their operations across a host of use cases.

QSRs leverage AI

Many QSRs are incorporating or planning to incorporate AI into their operations to appeal to customers who are growing fonder of the technology. One recent report found that 71 percent of consumers would be amenable to QSRs' and fast casual

restaurants' efforts to integrate AI into their business operations, for example.

Restaurants are beginning to tap these tools for better customer service and predictive analytics, which can provide them with insights into customer behaviors and act on them by tailoring their product offers. Such efforts can even be channel- or location-dependent, too, with many restaurants utilizing tactics like geo-targeting to send personalized or special offers to customers via mobile app.

ML and related algorithms are also driving the restaurant space. This means that QSRs can gain in-depth information about their business performances through real-time data platforms, which are constantly gathering data through their POS systems or other employee and guest connections. This allows QSRs to pinpoint patterns and trends and send other metrics to managers and auditors who can shed light on their meaning before making decisions.

How AI can aid in fraud detection, sales

A sizable number of restaurants use AI to curtail cybercrime such as internal fraud, which is reportedly to blame for up to 75 percent of QSRs' losses. Employee fraud can include refund abuse, gift card fraud or floating transactions, but AI models using dedicated algorithms can be trained to spot illicit and unusual activities. AI-based tools can identify minute transactions like voiding, deleting or discounting items and examine them in relation to

other factors, such as when they were made and the role of the employee undertaking these actions. Analyzing these myriad factors can enable the technology to spot potentially illegal behavior that might merit third-party review.

Mobile ordering fraud presents an even greater challenge for QSRs. Many consumers are turning to mobile apps during the pandemic, but these solutions can open them up to numerous scams if their security measures are not up to snuff. Fraudsters can obtain consumers' identities for just $4 apiece in some cases, and bad actors with access to such details can hijack customers' accounts and use their stored payment information or rewards points to fund their illicit purchases.

These considerations are prompting many QSRs to ditch their static rules and manual review-based fraud approaches in favor of AI- and ML-enabled methods, but even these moves require careful consideration and planning. Evidence suggests that restaurants must also monitor the trends and insights that these advanced technologies discover, which will help them establish more effective fraud-fighting measures.

QSRs today must provide seamless service and security to grow their mobile ordering operations as well as prevent both internal and external fraud. AI and ML tools, by leveraging a robust assortment of predictive analytics, can go a long way toward helping QSRs achieve these goals.

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.

CONSUMER

CONSUMER ORDERING INTERFACES

MOBILE APP	VOICE ASSISTANT	MESSENGER	SMART TV	CONNECTED CAR

CONSUMER ACQUIRERS

QSR BRANDED	QSR AGGREGATORS

INTEGRATORS

QSR ACQUIRERS

ORDER DIRECT	ORDER AGGREGATORS

POS
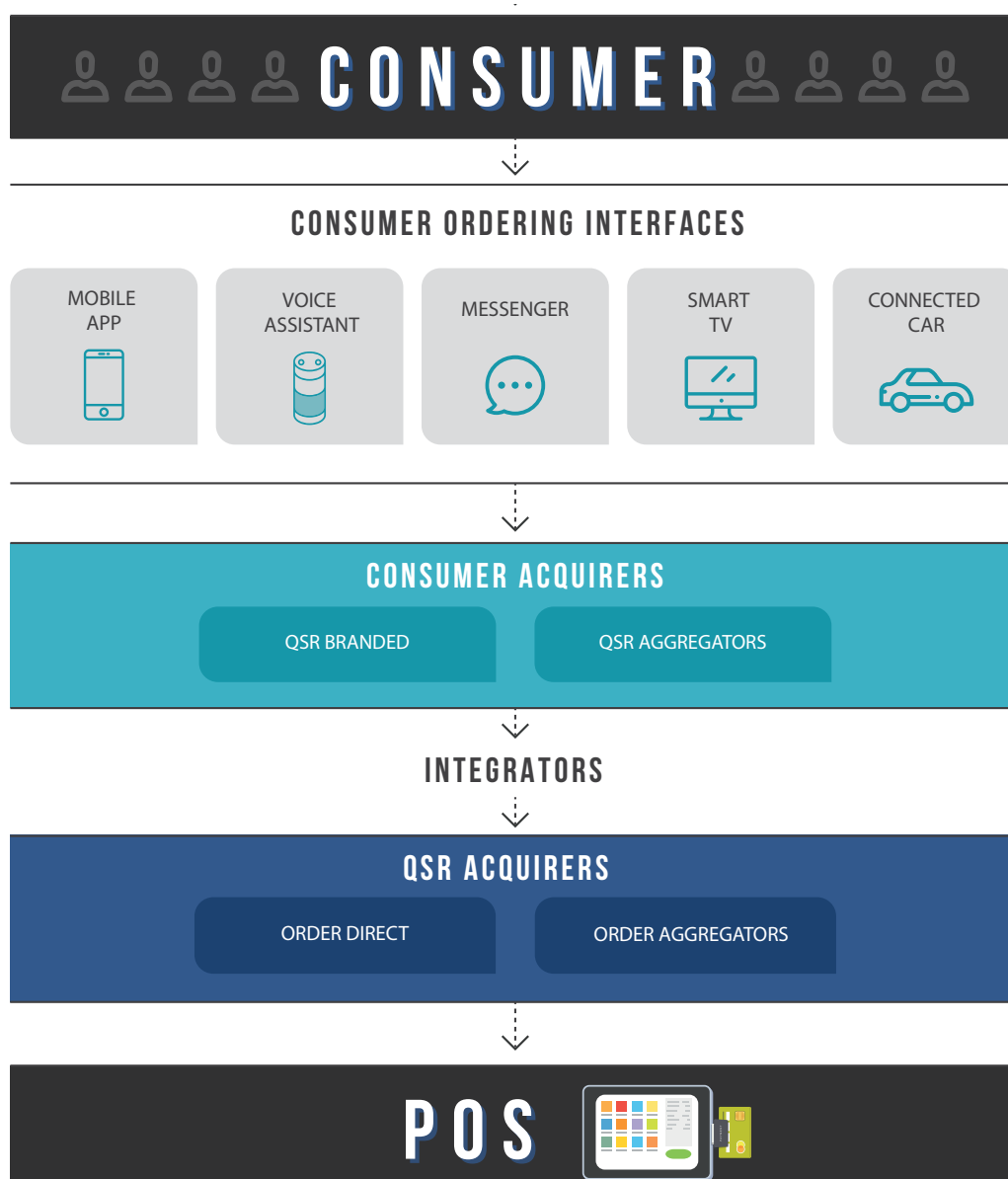
MOBILE ORDER-AHEAD SCORING METHODOLOGY

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:

01

02

03

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

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.

Rank	Provider	Score
1	Domino's	95.5
1	DUNKIN'	95.5
3	Starbucks	94
4	Chick-fil-A	90
5	BURGER KING	89
5	TACO BELL	89
7	Panera BREAD	88.5
7	CHIPOTLE MEXICAN GRILL	88.5
7	WINGSTOP	88.5
10	Pizza Hut	87.5

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	0	27.5	52.5
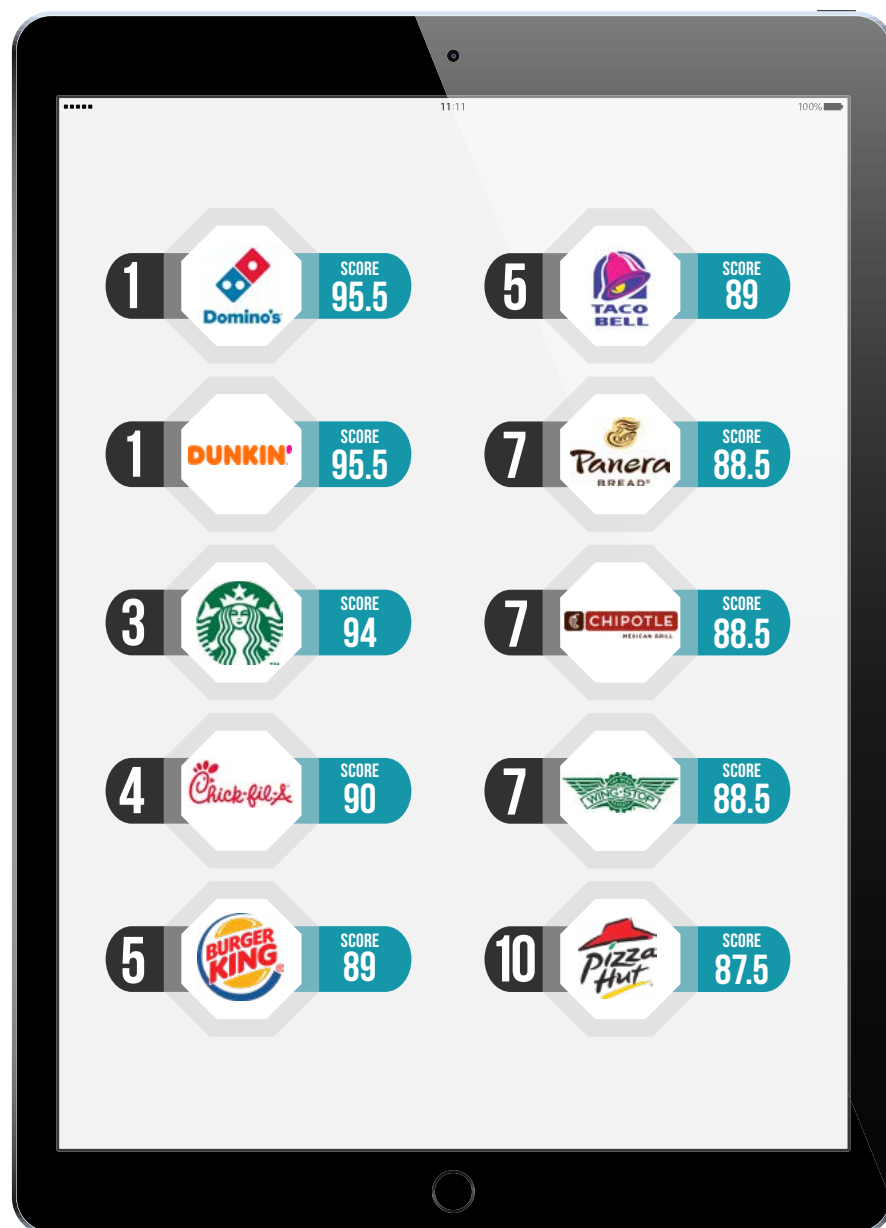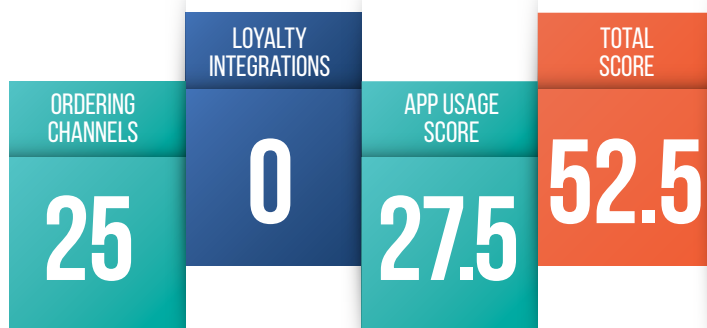
APPLEBEE'S

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	5	37

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	35.5	67.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	32.5	64.5
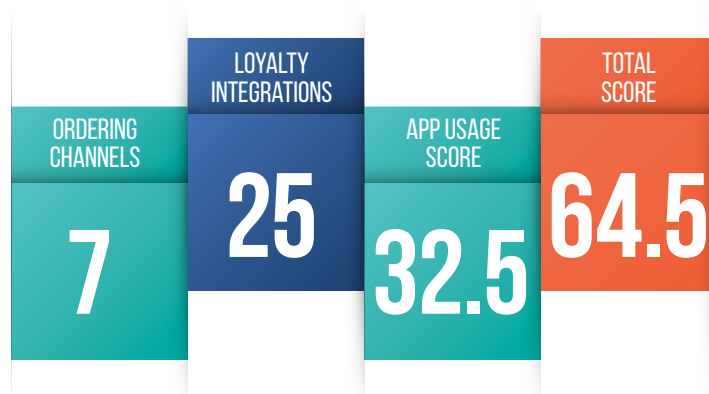
BLAZE PIZZA

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	39	89
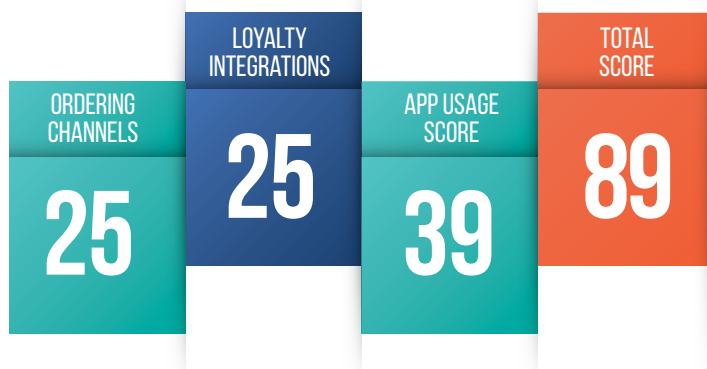
BURGER KING

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	18	50

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	11.5	43.5
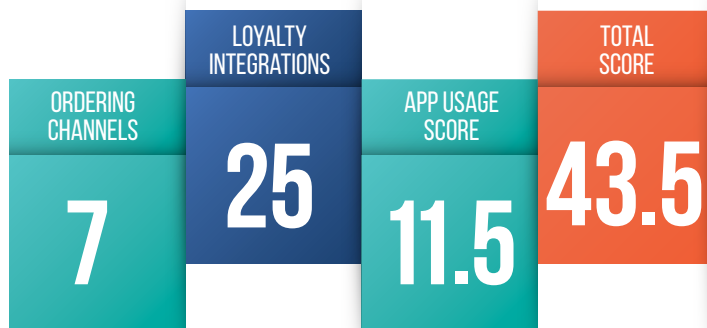
CAPRIOTTI'S

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	32	64

CAVA

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	50	90

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	40	72

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
17	25	46.5	88.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	10	35

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	19.5	44.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	0	23	38
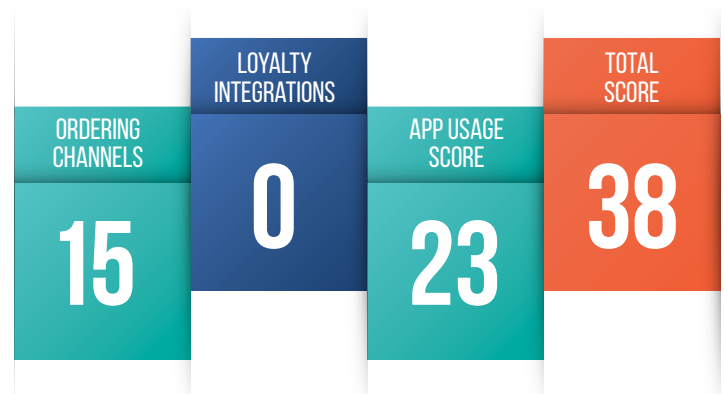
DENNY'S

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	45.5	95.5

Top Mobile Order-Ahead Provider

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 smart-watch. iPhone users can also access a voice-ordering assistant.

DONATOS® PIZZA

Every piece is important.™

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	27.5	59.5

DONATOS PIZZA

Launch of mobile order service date: *January 2017*

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

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	45.5	95.5
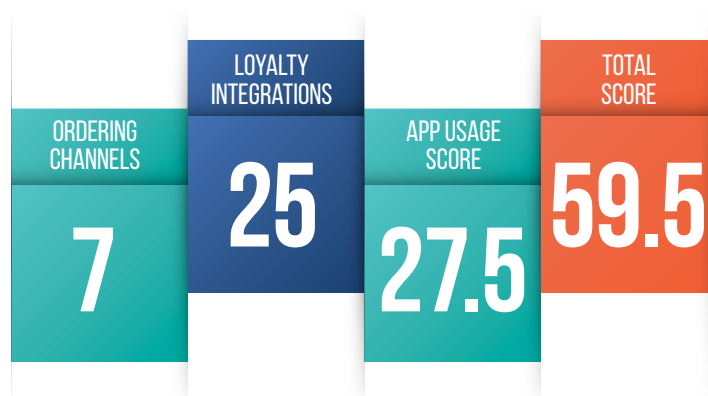
DUNKIN'

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	24	56
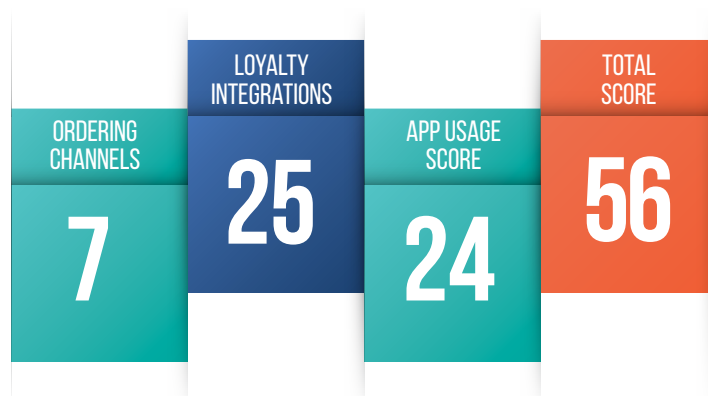
EL POLLO LOCO

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	30	62

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	0	36.5	51.5
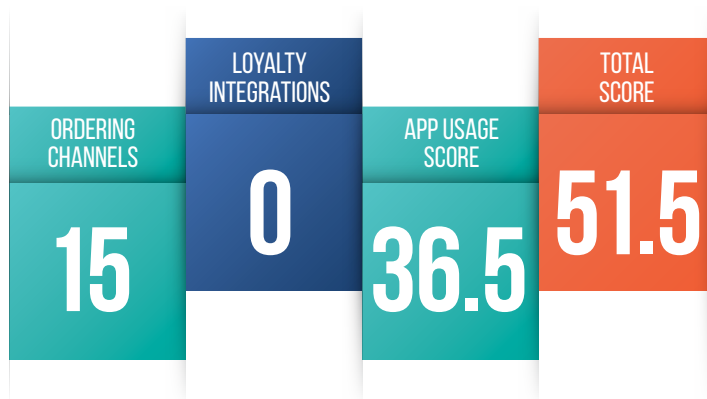
FIVE GUYS

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.

FREEB!RDS
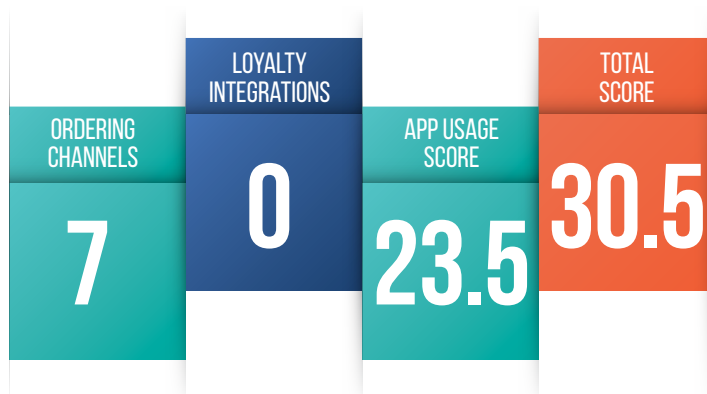WORLD BURRITO

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	16	56

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
FLAVORED CRUST PIZZA

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	23.5	30.5

HUNGRY HOWIE'S PIZZA

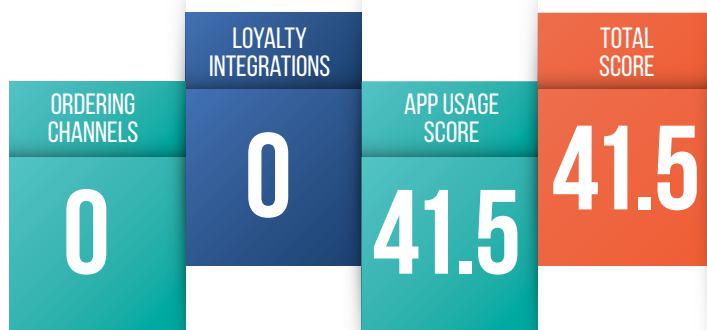**Launch of mobile order service date:** *January 2015*

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	32	64

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	38	70

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	0	41.5	41.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	22	54

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	5	30

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.

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	36	68

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	47	87

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	28	60
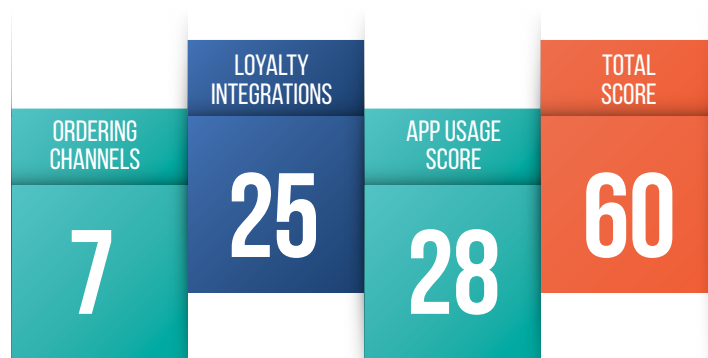
MOE'S SOUTHWEST GRILL

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	10.5	42.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	38.5	88.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	34.5	84.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	21	53

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	37.5	87.5

PIZZA HUT

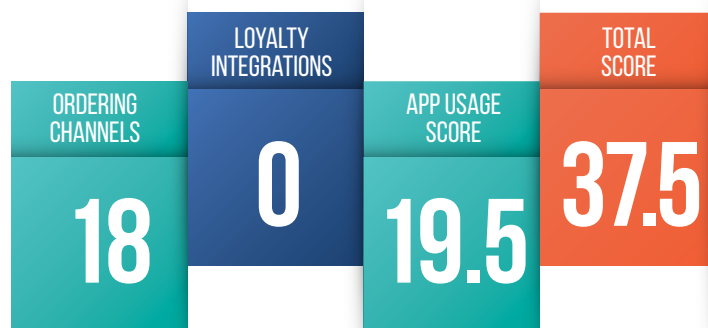**Launch of mobile order service date:** *August 2009*

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	25	11	44

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
18	0	19.5	37.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	20	52
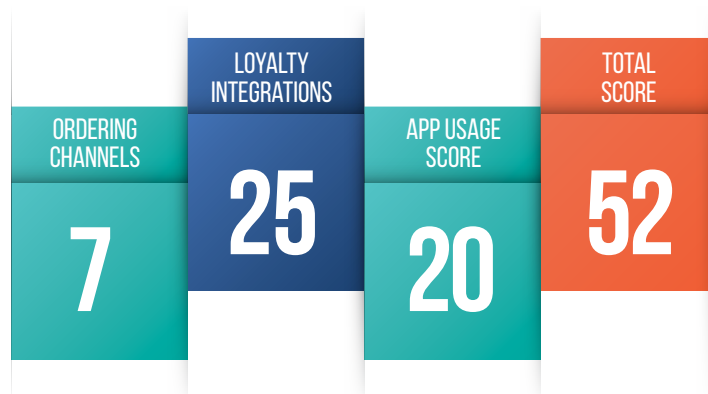
POTBELLY SANDWICH SHOP

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	30	62

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	26.5	51.5
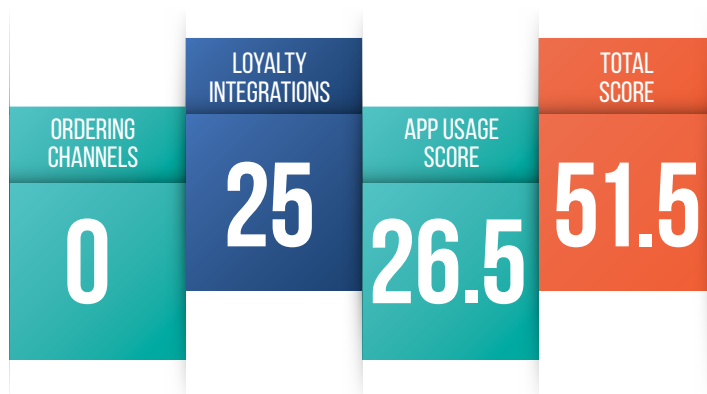
QUIKTRIP

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	18	50

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	38	78

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.

ORDERING CHANNELS
18

LOYALTY INTEGRATIONS
25

APP USAGE SCORE
33

TOTAL SCORE
76

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.

ORDERING CHANNELS
7

LOYALTY INTEGRATIONS
25

APP USAGE SCORE
19

TOTAL SCORE
51

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
17	25	45	87

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	5	30
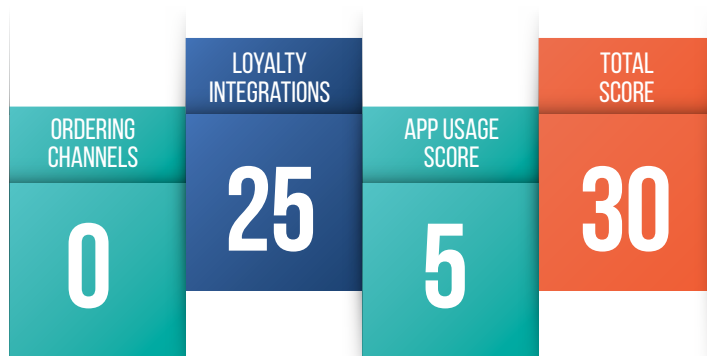
SPECIALTY'S CAFÉ & BAKERY

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	44	94

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	39.5	79.5

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	32	64

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	39	89

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	43	68

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
18	25	21.5	64.5
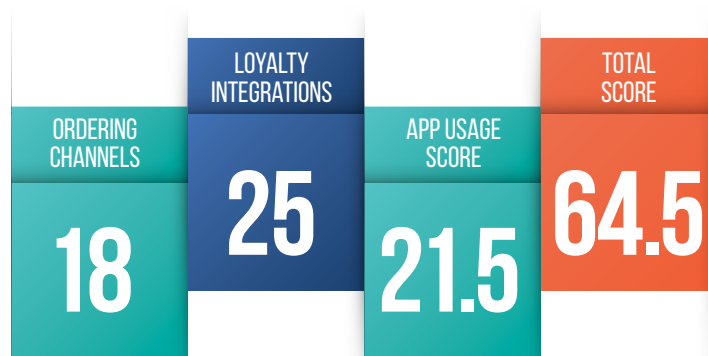
TGI FRIDAYS

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 CAFE SMOOTHIE

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	28.5	60.5

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.

veggiegrill

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	17	42

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	40	72

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 git cards, check their balances, earn rewards and find nutritional information.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	26	58

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	0	28	28
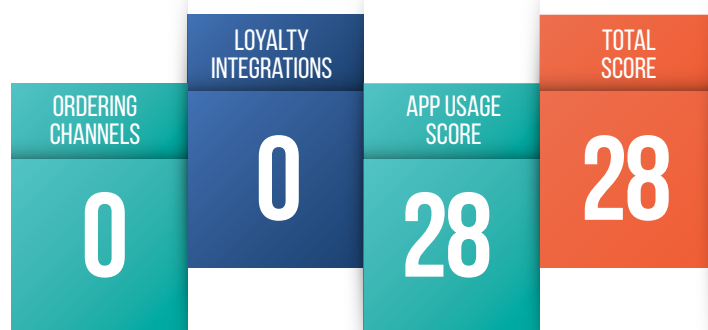
WHITE CASTLE

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	38.5	88.5
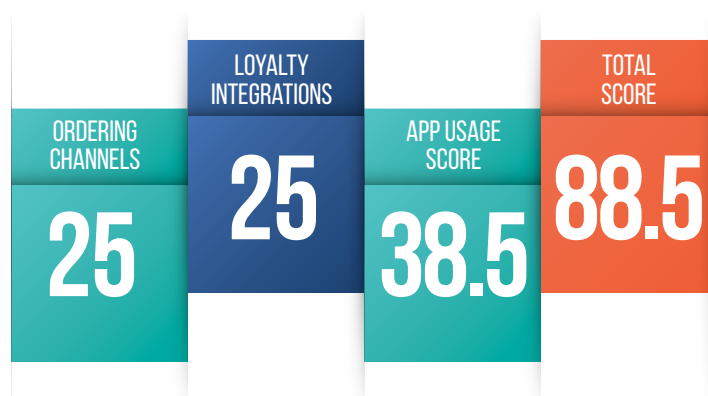
WINGSTOP

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.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	11.5	43.5
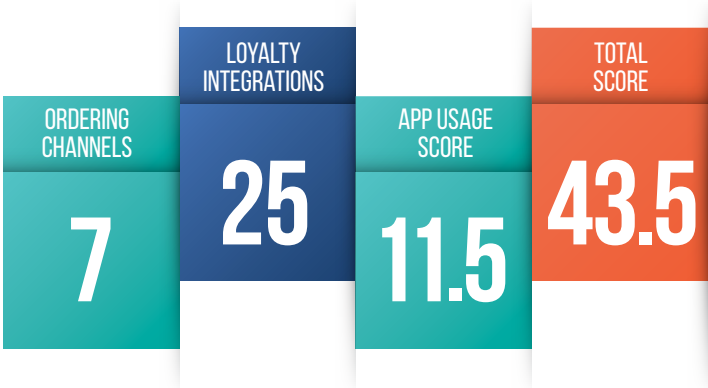
ZOËS KITCHEN

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 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.

PYMNTS.com

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Kount

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