



The Restaurant Readiness Index, a PYMNTS and Paytronix collaboration, takes a close look at how the events of the past 16 months have fundamentally changed the way that restaurants engage with their customers. We surveyed 514 managers of quick-service restaurants (QSRs) and full-service restaurants from across the United States between April 1 and May 21, 2021, about the ordering features they believe are key to their future success in the digital-first restaurant ecosystem.

2021 EDITION

# Restaurant Readiness Index

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# RESTAURANT READINESS INDEX



# TABLE OF CONTENTS

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**02** Introduction

**10** Turning the corner

**14** Bread and butter

**20** Fixing the restaurant loyalty demand gap

**26** The cost of underinvesting

**32** Conclusion

## ACKNOWLEDGEMENT

The Restaurant Readiness Index was done in collaboration with Paytronix, and PYMNTS is grateful for the company's support and insight. PYMNTS.com retains full editorial control over the following findings, methodology and data analysis.



## INTRODUCTION



# INTRODUCTION

**Casual dining restaurant chain P.F. Chang's announced in late June that it would be opening two new P.F. Chang's To Go locations in Irving, Texas, and Orlando, Florida.** P.F. Chang's To Go represents a departure from the full-service offerings that helped make the pan-Asian eatery a household name in the United States, offering online ordering, takeout, catering and delivery services exclusively.

P.F. Chang's introduced this remote dining concept in 2020, when brick-and-mortar restaurants across the nation closed and diners had no choice but to order their food for takeout. In 2021, this model has become a central piece of its long-term growth strategy. Twenty additional P.F. Chang's To Go locations are currently under construction, and the chain aims to have as many as

50 opened across Arizona, Colorado, Florida, Louisiana, Nevada and Texas by the end of 2022.<sup>1</sup>

This hard pivot into the takeout space might have seemed out of character for a full-service restaurant chain prior to March 2020, but it is not today. A digital-first economy has since emerged, and remote ordering in this economy, and on-site dining, is now restaurants' bread and butter. PYMNTS' latest research shows that 69 percent of the average restaurant's sales are now generated by orders placed either online or over the phone and eaten at home.

The growing importance of remote food orders reflects a broader, more fundamental shift as eCommerce becomes more central to consumers' everyday lives. The ways in which

consumers engage with restaurants and their types of food ordering experiences have changed. These "digital consumers" want restaurants to accommodate their growing need for quick, smooth and convenient transactions across the board. Just what types of ordering and payment features can help restaurants deliver those experiences, and how well have restaurants managed to implement those features to meet the demands of these market realities?

The 2021 edition of the Restaurant Readiness Index, a PYMNTS and Paytronix collaboration, takes a close look at the details of how the past 16 months have fundamentally changed the way that restaurants engage with their customers. We surveyed 514 managers of quick-service restaurants (QSRs) and full-service restaurants from across the U.S. between April 1 and May 21, 2021 about the ordering features they have adopted since March 2020, how much of their revenue was generated in person,

online and over the phone and their 2021 financial outlook. Our goal was to discover the myriad ways in which the transition to a remote-first ecosystem has changed the restaurant business and how restaurants are adapting to match.

We examined the ordering and payment features restaurants offered and then matched them against those that restaurant customers said they wanted most in a 25,000-consumer survey that has been ongoing since September 14, 2020. Restaurants were then given a score on a scale from 0 to 100 to reflect how well they managed to match consumers' expectations. Higher scores mean their offerings more closely meet their customers' expectations and their restaurants are more innovation-ready. This report presents the findings of our extensive research.

This is what we learned.

1. Domino's, P.F. Chang's Adapt To Make Off-Premise Stick In Post-COVID Future. PYMNTS.com. 2021. <https://www.pymnts.com/restaurant-innovation/2021/dominos-pf-changs-off-premise-restaurants/>. Accessed July 2021.

# INTRODUCTION

**Seventy percent of all restaurants expect their 2021 revenues to be on a par with or exceed their 2019 revenues.**

Restaurants are optimistic about how the next 12 months will impact their bottom lines, despite revenues for many having sharply declined over the past year. Seventy-seven percent of all restaurants now say they believe their 2021 revenues will exceed their 2020 revenues, and optimism is highest among restaurants whose revenues took a hit during the pandemic. Eighty-four percent of restaurants that saw their revenues decrease between 2019 and 2020 believe their revenues will improve in 2021. Seventy-two percent of restaurants whose revenues increased and 53 percent of those whose revenues remained stable between 2019 and 2020 say they expect a boost to their bottom line in 2021.

This optimism is even more impressive when we consider how many restaurants believe their 2021 revenues will improve over 2019. Sixty-nine percent of all restaurants are confident that their 2021 revenues will either be on a par with or even exceed the revenues they generated two years ago, and 42 percent of them expect their

revenues to increase compared to 2019. It is therefore clear that although the 16 months have radically changed the dynamics of the industry, many restaurants feel that they have managed to successfully transform their business models to meet the demands of this new, post-pandemic economy.



**Remote food orders are now restaurants' primary source of revenue. Sixty-seven percent of the average restaurant's revenue is now generated either online or over the phone.**

The restaurants that have managed to keep their doors open since March 2020 have done so by finding new ways for their customers to order from the safety and comfort of their homes. What is less well-known is the extent to which restaurants now rely on remote food orders to drive sales. Sixty-seven percent of the average restaurant's revenue now comes from food orders placed either online or over the phone. Remote food orders are even more critical for QSRs, as the average QSR now generates as much as 75 percent of its sales from orders made online or over the phone. This underscores just how vital remote food orders have become to the restaurant business.

Not all remote ordering channels are created equal, however. Online orders account for over 40 percent more revenue than phone orders to the average restaurant, and aggregators drive more revenue than any other digital ordering channel. Restaurants now generate 40 percent of their total sales by selling to customers online, via mobile app, using

third-party aggregators or leveraging other digital ordering options, on average. Just 28 percent of their total sales are generated by orders placed via phone call. Aggregators alone now generate 16 percent of the average restaurant's revenue. Mobile order-ahead is not far behind, however, totaling 14 percent of the average restaurant's revenue.

**Many restaurants underestimate how important loyalty and rewards programs are to their customers.**

Digital ordering channels are not the only features that can help restaurants gain a competitive edge in this new, digital-first ecosystem. Restaurant customers say countless other ordering features would make them more inclined to place food orders, and loyalty programs are at the very top of the list. Sixteen percent of restaurant customers say that they would be more inclined to order from restaurants that offered loyalty and rewards features than from those offering any other type of ordering feature. Our data shows that 13 percent would feel most incentivized to purchase from restaurants that allowed them to order online, and another 9.3 percent of consumers would feel most incentivized to order



from restaurants that allowed them to order without standing in line. This illustrates that the ability to earn rewards is even more appealing than digital ordering options for many diners.

Many restaurants nevertheless underestimate the importance of loyalty programs as well as other incentives like drive-thru and card-on-file payments. Fifty-one percent of all restaurant customers say they believe that loyalty and rewards programs will be critical to restaurants' success going forward, but only 36 percent of restaurant managers

say the same. We observed a similar disconnect when it comes to drive-thru options. Forty percent of restaurant customers say they believe restaurants' drive-thru offerings will be central to their future success, while 26 percent of restaurant managers say the same. This gap, if left unaddressed, could potentially lead restaurants to underinvest in the features their customers want most.

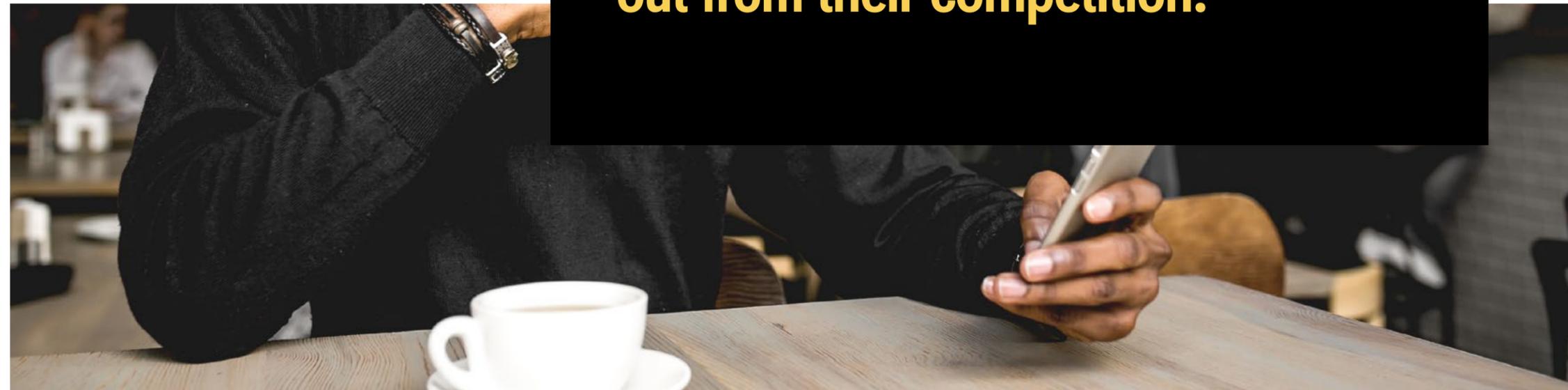
**The restaurants that fell furthest behind in 2020 are those that removed their loyalty and rewards options. Underinvesting in loyalty and rewards offerings could be putting the most vulnerable restaurants at greater risk.**

Underinvesting in loyalty programs has a real cost. Our research shows that while restaurants were overall just as innovation-ready in 2020 as they were in 2019, the ones whose innovation readiness slipped were usually those that dropped their loyalty and rewards offerings. These so-called “bottom performers” — i.e., those that had the lowest Restaurant Readiness Index scores — had their overall average Index score drop by 30 percent between 2020 and 2021, when they achieved an average score of just 16 out of 100. This coincides with a 48 percent decrease in the share of bottom performers offering loyalty and rewards programs.

Removing loyalty and rewards features was so detrimental to bottom performers’ overall innovation readiness that it offset whatever gains they may have had from adding new digital ordering features. Twenty-eight percent more bottom performers allowed their customers to pay online in 2020 than did in 2019, in fact, but it was not enough

to make up for the impact of removing their loyalty offerings.

Top performers were able to pull slightly ahead on innovation readiness by adding both digital ordering features and loyalty and rewards offerings, in contrast. The average 2021 top performer Index score was 83 out of 100 — 3.6 percent higher than it was in 2019. This was possible in part because top performers were 7.1 percent more likely to provide digital ordering options — especially the ability to order via app — than in 2020 but also because they held on to whatever loyalty and rewards options they might have had. Not one top performer removed their loyalty offerings in 2020.



# LOYALTY AND REWARDS OPTIONS ARE KEY

to helping restaurants stand out from their competition.

# TURNING

## TURNING THE CORNER

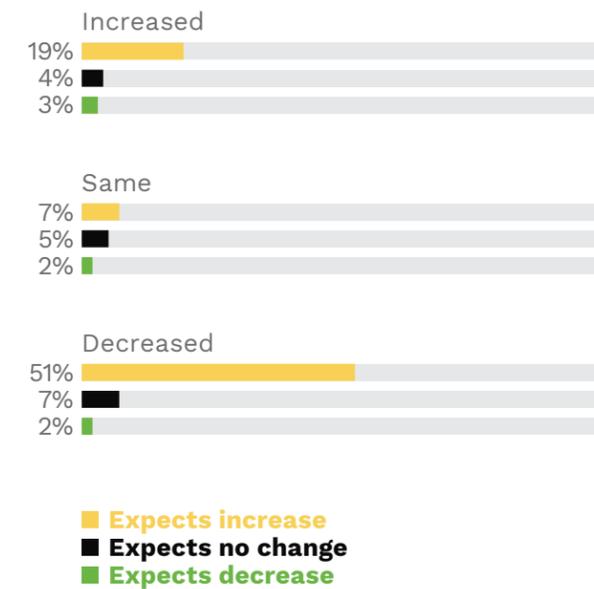
The vast majority of restaurants are confident that their financial performances will improve over the course of the next year, and those whose bottom lines took a hit in 2020 are the most optimistic of all. Seventy-seven percent of all restaurants believe that they will generate more revenue in 2021 than they did in 2020, and the share holding this belief is as high as 84 percent among restaurants whose revenues decreased between 2019 and 2020. Seventy-two percent of restaurants that saw their revenues increase between 2019 and 2020 expect 2021 to bring them a second consecutive year of growth, moreover.

# THE CORNER

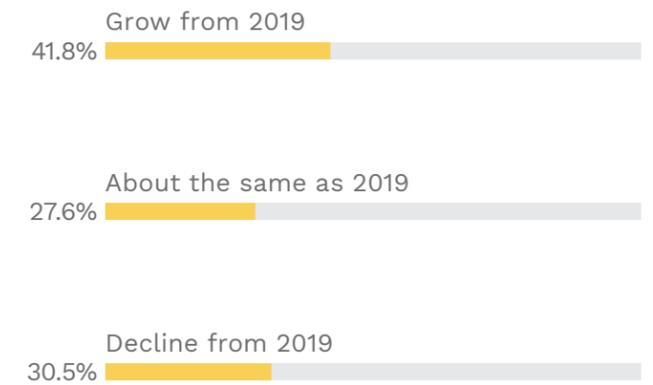
FIGURE 1:

### How restaurant managers expect their revenues to change in 2021

1A: Share who expect revenue to change in select ways year over year, by whether their revenues increased or decreased in 2020



1B: Share who expect revenue to change in select ways compared to 2019



Source: PYMNTS.com | Paytronix Restaurant Readiness Index

Digital ordering capabilities have played a key role not only in helping restaurants get back on their feet but also in driving the sustained growth that many of them expect in 2021. Many consumers shifted from ordering and dining in person to ordering food via app, aggregator and desktop website following March

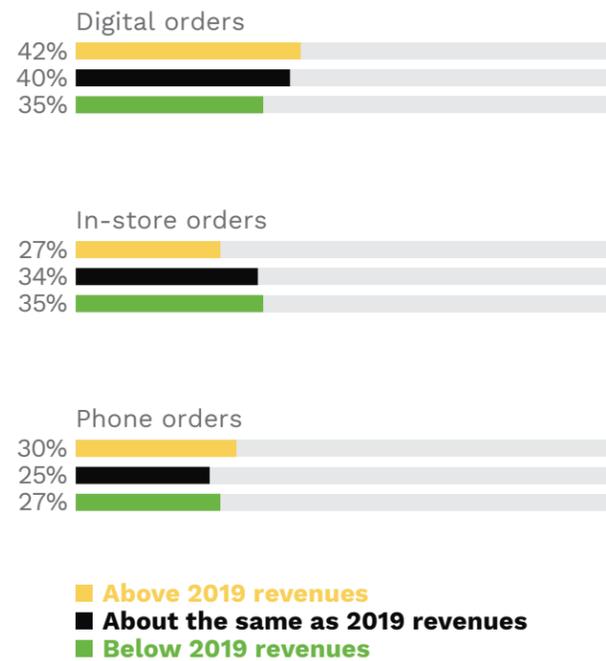
2020, acquiring a strong preference for online food orders that shows no sign of receding. It follows that the restaurants that now generate more of their sales online would also be the most optimistic about their financial futures.

The more revenue that restaurants generate via digital ordering channels like these, the brighter the outlook they have for their 2021 revenues. Restaurants that expect to generate higher revenues in 2021 than they did in 2019 generate 42 percent of their total sales online and only 27 percent of their total sales in person, on average. These optimistic restaurants also generate an average of 30 percent of their sales over the phone.

The inverse is also true. Restaurants that do not expect their 2021 revenues to surpass 2019 levels generate less in sales online and more in person. Restaurants with this pessimistic financial outlook generate an average of 35 percent of their sales online and another 35 percent in person. The remaining 27 percent of their sales are generated over the phone.

**FIGURE 2:**  
How restaurants' financial outlooks compare to the channels they use to generate sales

**Average share of sales generated online, in person and over the phone, by 2021 financial outlook**



Source: PYMNTS.com | Paytronix Restaurant Readiness Index

**THE MORE SALES RESTAURANTS GENERATE ONLINE,**

**the more confident they are that their revenues will increase in 2021.**

# BREAD &

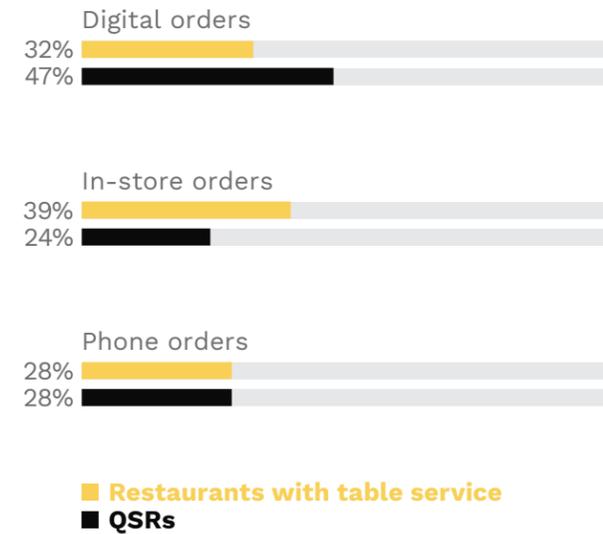
## BREAD AND BUTTER

Remote food orders are now responsible for the strong majority of the average restaurant's revenue, but the extent to which restaurants rely on remote versus on-site sales varies with the type of restaurant in question. Sit-down restaurants generate more in-person sales than QSRs, for example. Food orders placed and eaten on-site generate 40 percent of the average sit-down restaurant's total sales but just 25 percent of the average QSR's total sales. This underscores just how important digital food sales have become since the pandemic first began.

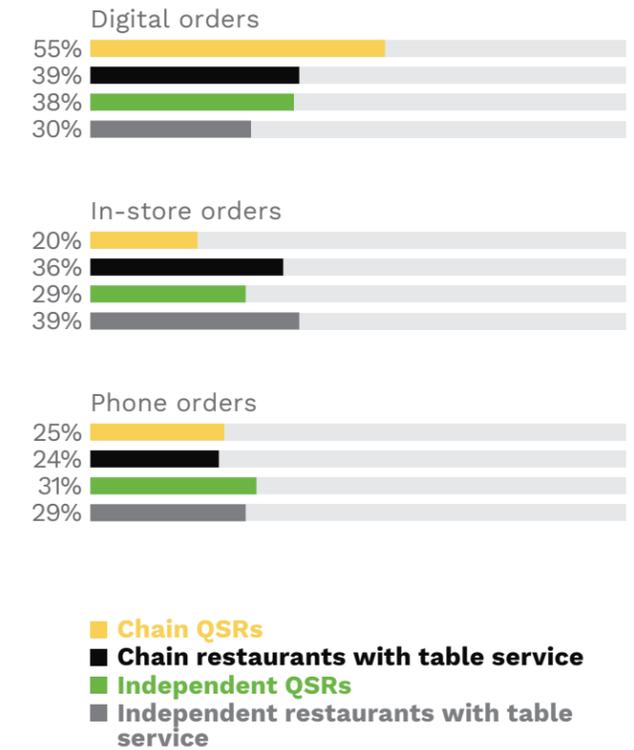
# BUTTER

**FIGURE 3:**  
How independent versus chain restaurants generate sales

**3A: Average share of sales generated online, in person and over the phone, table-service restaurants versus QSRs**



**3B: Average share of sales generated online, in person and over the phone, chain versus independent restaurants**



Source: PYMNTS.com | Paytronix Restaurant Readiness Index



It is critical to note that in-person orders still make up only a minority of sales for both sit-down restaurants and QSRs, however. Digital food orders generate the largest bulk of sales for both types of restaurants, and they are especially vital for QSRs. Online orders account for 47 percent of the average QSR’s total sales, while over-the-phone orders account for 28 percent of their total sales. Online and phone-in orders make up 32 percent and 28 percent, respectively, of the average sit-down restaurant’s total sales.

Most restaurants rely on several different digital ordering channels to convert customers. Orders placed via aggregators like DoorDash, Grubhub and Uber Eats generate more sales than those placed using any other digital ordering channel, but not by much. The average restaurant now generates 16 percent of its total sales via aggregator, 14 percent of its sales via mobile order-ahead and 10 percent of its sales via desktop web-site. This shows that restaurants have an opportunity to maximize conversion by providing an abundance of online ordering options. Doing so will allow them to meet far more of their customers’ ordering needs than they could by providing a single online ordering option.

**FIGURE 4:**  
How sit-down restaurants and QSRs generate sales

**Average share of sales generated via different ordering channels, sit-down restaurants versus QSRs**



Source: PYMNTS.com | Paytronix Restaurant Readiness Index

Aggregators, mobile apps and websites drive even more sales for QSRs. The average QSR now generates 18 percent of its total sales via aggregator and 17 percent of its total sales via mobile order-ahead. It also generates 12 percent of its total sales via orders placed over the phone, on average.

Sit-down restaurants generate less of their total sales online and more in person, compared to QSRs. They generate more than twice as much in sales as QSRs by serving on-site diners. In-person orders account for 27 percent of the average sit-down restaurant's total sales and just 12 percent of the average QSR's total sales.

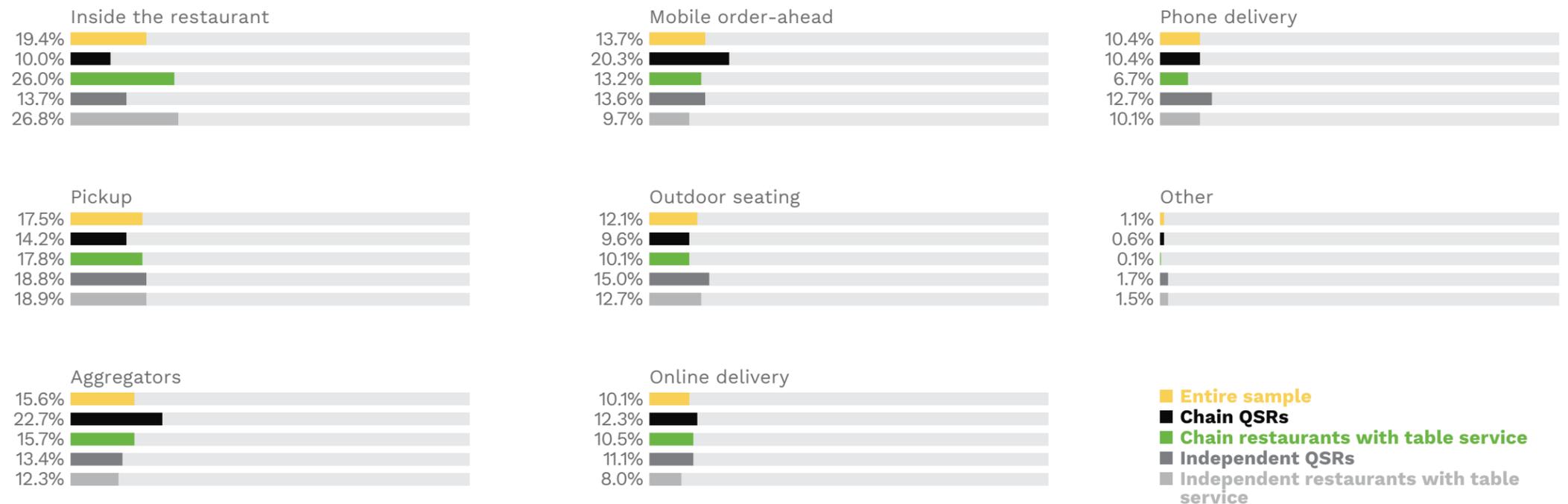
Outdoor dining is an exception to this rule, however. Sit-down restaurants and QSRs both rely on food orders placed and eaten in outdoor seating areas for 12 percent of their total sales.

There are also glaring differences in the channels that independent restaurants and chain restaurants use to generate sales. Chain QSRs stand out for being the most mobile-driven of all, in the sense that they generate a far greater share of their total sales via aggregator and mobile order-ahead and far less of

their total sales via orders made in person than any other type of restaurant. Orders placed using aggregators and mobile order-ahead options account for 23 percent and 20 percent of chain QSRs' total sales, on average.

**FIGURE 5:**  
How different restaurant types generate sales

**Average share of sales generated via different ordering channels, by restaurant type**



Independent sit-down restaurants are on the opposite end of the spectrum. They are the least mobile-driven and the most reliant on in-person sales of all. The average independent restaurant collects 27 percent of its total sales from orders placed and eaten inside their brick-and-mortar locations. This compares to just 12 percent and 10 percent of the sales they generate through third-party aggregators and mobile order-ahead options.

Independent QSRs also stand out for generating more of their sales by serving diners who order and eat their food in outdoor seating areas and by taking orders made over the phone. These types of orders generate 15 percent and 13 percent of the average independent QSR's total sales, respectively.

Source: PYMNTS.com | Paytronix Restaurant Readiness Index

# LOYALTY

## FIXING THE RESTAURANT LOYALTY DEMAND GAP

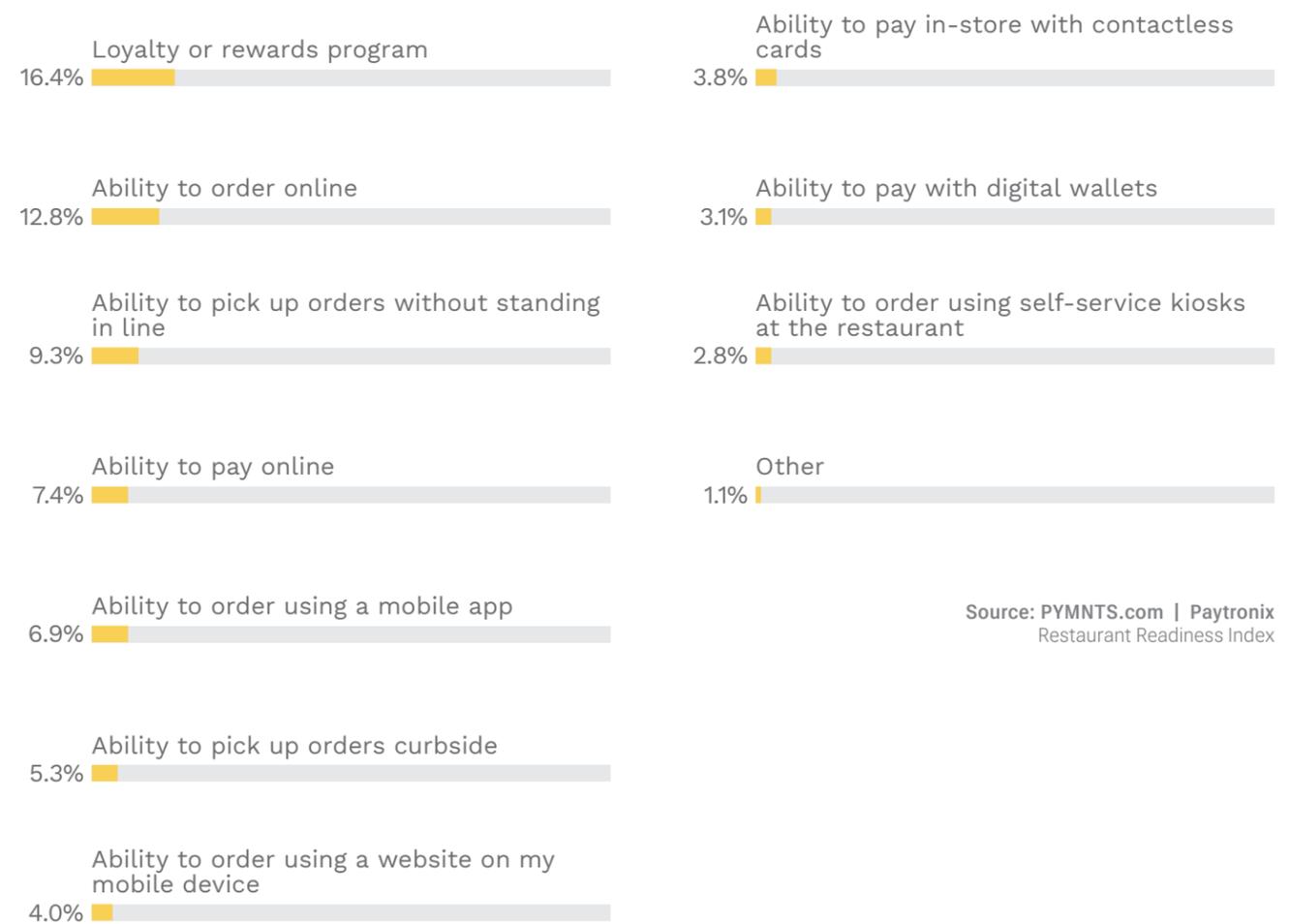
Digital purchasing options are more central to the restaurant business than they have ever been, but they are not the only feature that can help drive sales. Many consumers also say they would be willing to spend more on their food orders if they were able to pick up their orders without having to stand in line, for example, or if they could pick them up curbside. Our research shows that 9.3 percent and 5.3 percent of restaurant customers would buy more from a restaurant that offered the ability to skip the checkout line and the ability to pick up curbside, respectively. This type of service is commonly available to customers ordering their food online, but it could also be provided for orders made over the phone.

# GAP

**FIGURE 6:**

How many restaurant customers would boost their spending for select ordering features

Share who would be most inclined to spend more on food orders if offered select features over any other



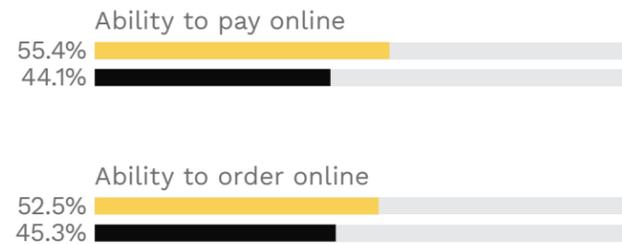
Source: PYMNTS.com | Paytronix  
Restaurant Readiness Index

Many restaurant customers are also interested in options that would make their on-site purchases faster and more convenient: 3.8 percent of consumers say they would be willing to boost food order spend if they could pay in-store using contactless cards, for example. Another 3.1 percent and 2.8 percent say they would spend more if they could pay in person using digital wallets and self-service kiosks, respectively.

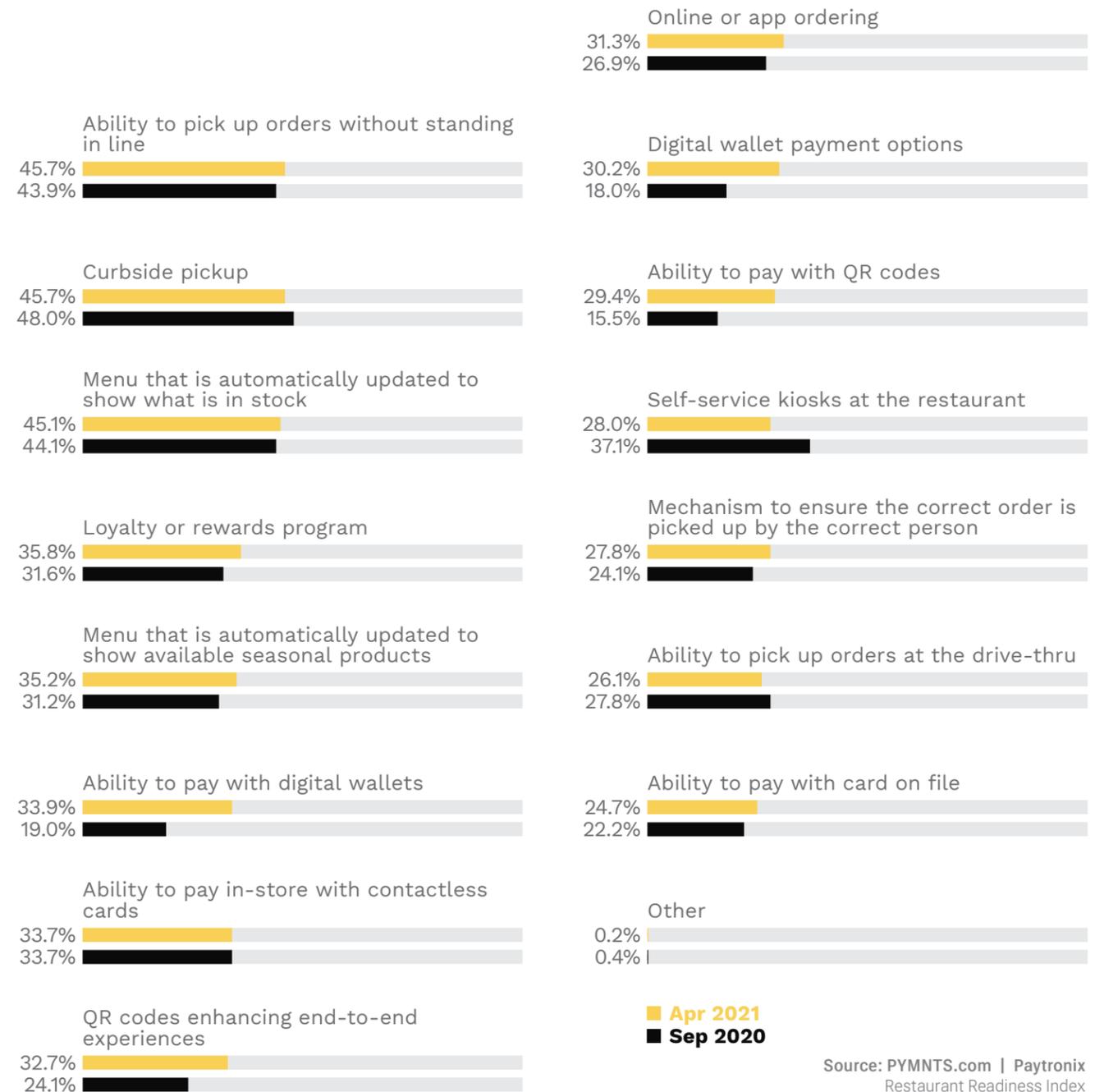
The one ordering feature that would inspire more restaurant customers to increase their spend than the ability to order online is loyalty and rewards. Sixteen percent of all restaurant customers say they would be willing to boost their restaurant spending for loyalty programs over any other feature, the highest share. In comparison, 13 percent and 7.4 percent of restaurant customers say that the ability to order online and to pay online, respectively, would convince them to spend more on their food orders than any other feature would.

**FIGURE 7:**  
**What restaurants' managers and customers believe will be key to driving long-term success**

**7A: Share who believe select features will be important to restaurants' future success, by date**



Many restaurants are unaware of how much their customers would like to be able to earn rewards for their food orders. Restaurants are 16 percent less likely to be offering some type of loyalty or rewards program now than they were in 2020. This is in part because restaurant managers are still far less likely than their customers to believe that such programs will be important to their future success. Fifty-one percent of restaurant customers see loyalty and rewards as a major factor that will help determine whether restaurants succeed in the long run, but only 36 percent of restaurant managers see loyalty and rewards playing such a key role in their long-term growth strategies.

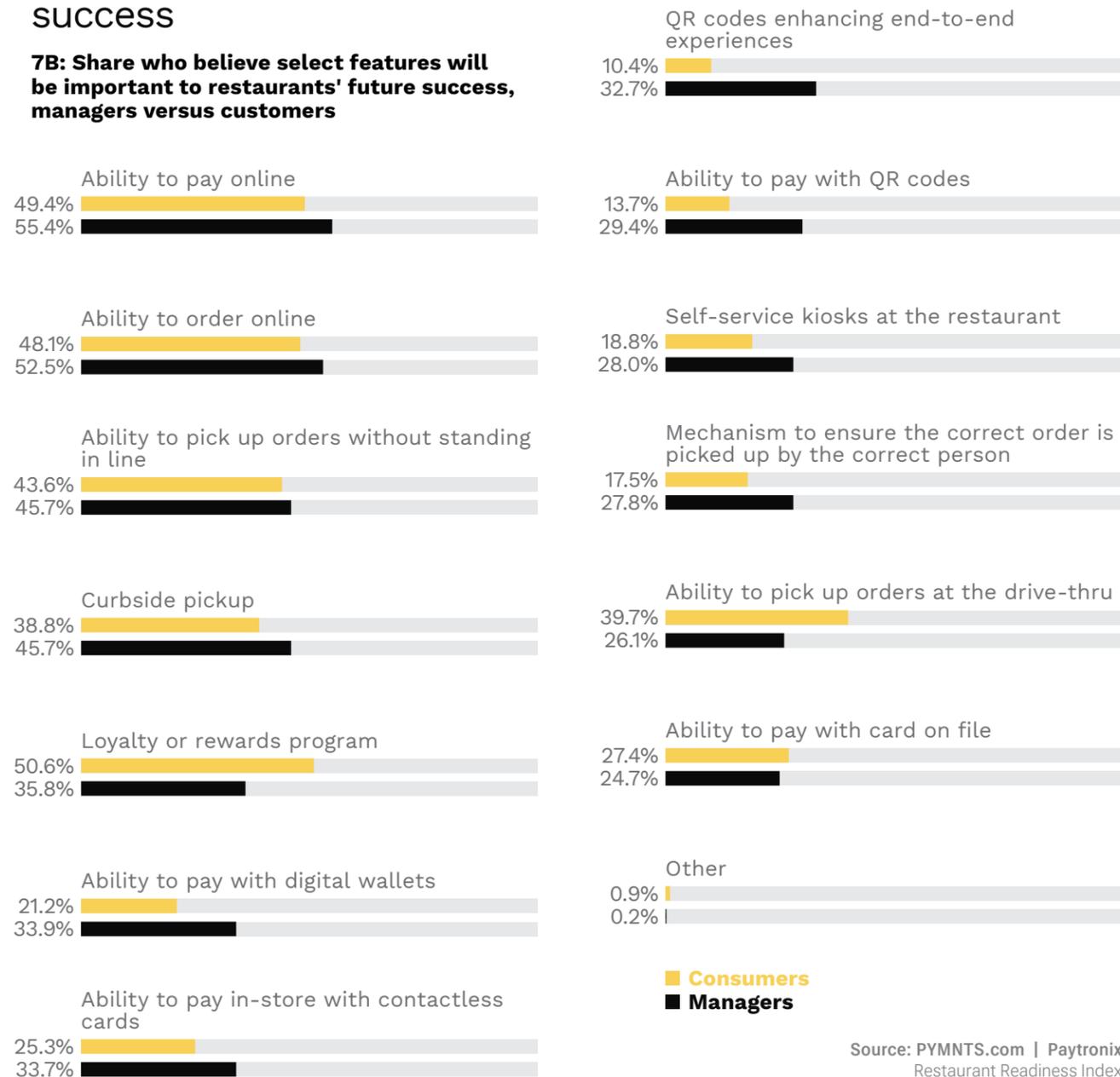


Source: PYMNTS.com | Paytronix Restaurant Readiness Index

**FIGURE 7 (continued):**

### What restaurants' managers and customers believe will be key to driving long-term success

**7B: Share who believe select features will be important to restaurants' future success, managers versus customers**



Nor are loyalty programs the only feature whose appeal restaurants tend to underestimate. Many restaurants also overlook their customers' interest in drive-thru pickup options. Forty percent of restaurant customers say

that drive-thru pickup options will be important to restaurants' future success, and just 26 percent of restaurant managers believe they will.

# RESTAURANTS UNDERESTIMATE JUST HOW MANY

of their customers want to be able to use loyalty and rewards programs.

# COST OF

## THE COST OF UNDERINVESTING

There are restaurants that appear to understand the power of loyalty and rewards programs as a market differentiator. The 100 restaurants with the highest Restaurant Readiness Index scores in our survey (top performers) are also the most likely to offer some type of loyalty and rewards program. Ninety-four percent of 2021's top performing restaurants provide loyalty and rewards options. This is far more than the 51 percent of middle performers that do the same. Only 11 percent of the 30 lowest-scoring restaurants make use of loyalty offerings, by contrast.

# UNDER INVESTING

**FIGURE 8:**

Which features are most common among restaurants

**8A: Share of restaurants offering select features, by date**

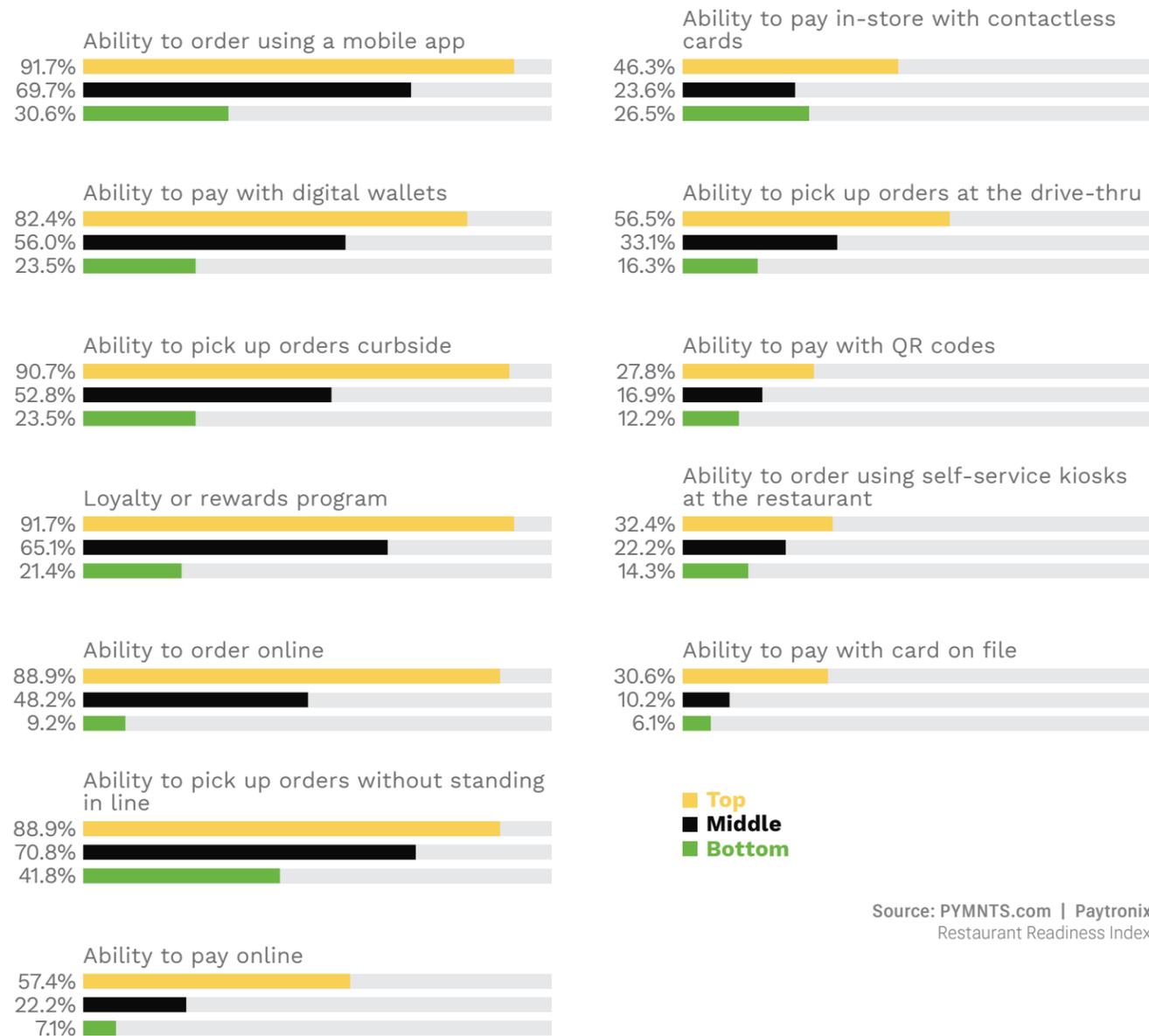


Source: PYMNTS.com | Paytronix Restaurant Readiness Index

**FIGURE 8 (continued):**

Which features are most common among top, middle and bottom performers

**8B: Share of top, middle and bottom performers offering select features**



Source: PYMNTS.com | Paytronix Restaurant Readiness Index

Top-performing restaurants differentiate themselves

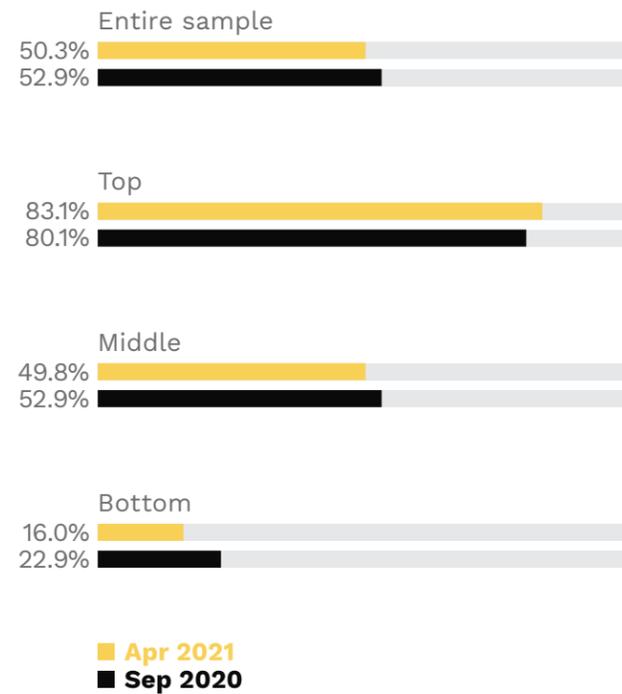
**BY OFFERING BOTH DIGITAL ORDERING OPTIONS AND LOYALTY FEATURES.**

Loyalty and rewards features are not the only factor differentiating top performers from the rest, to be sure. Top performers are more likely than either middle or bottom performers to offer every type of ordering feature. They always have been. What changed between 2020 and 2021 is that top performers kept their loyalty and rewards offerings, while bottom performers got rid of them. Forty-eight percent fewer bottom performers offer loyalty programs than did in 2020, while not a single top performer removed its loyalty and rewards offerings in that time.

Top performers were able to boost their overall innovation readiness by not only keeping their loyalty programs but also expanding their digital ordering capabilities — especially in mobile app payments. Top performers are 4.5 percent more likely to offer digital ordering capabilities than they were in 2020, and they are 7.1 percent more likely to offer mobile app-enabled ordering options than they were last year. The combination of these factors helped top performers earn an overall Index score of 83.1 in 2021, up from 80.1 in 2020.

**FIGURE 9:**  
**How Restaurant Readiness Index scores have changed over time**

**Average Index scores seen among top, middle and bottom restaurants, by date**



Source: PYMNTS.com | Paytronix Restaurant Readiness Index

Bottom performers have also spent the past year investing in new digital ordering capabilities, but cutting their loyalty programs nullified any Index score improvements that these digital capabilities might have been able to provide. Bottom performers are 22 percent more likely to offer digital payment options than they were in 2020, in fact, but these restaurants still saw their average Index score decrease from 22.9 to

16 in that time. This demonstrates that digital capabilities in and of themselves are no longer enough to keep restaurants ahead of the curve. Such options are not seen as differentiators in a market in which digital is the standard. Restaurants must therefore invest in other features that can help strengthen their relationships with their customers to gain a competitive edge.





## CONCLUSION

The digital-first food ordering habits that consumers have acquired since March 2020 have fundamentally changed the restaurant industry. The brick-and-mortar restaurant is no longer the focal point of consumers' dining experiences but a single touch point in a much broader, decentralized and digital-first ecosystem. Restaurants have come to understand that providing digital ordering features is key to delivering their customers the food ordering experiences they want when they want them, but some restaurants have yet to realize that digital ordering features

are the price of admission in this new market — not a differentiator. Gaining a competitive edge in this new ecosystem requires that restaurants not only have digital ordering capabilities in place but also offer value-added features, especially loyalty programs, to build the strong relationships they need to transform casual diners into loyal customers.

# ABOUT

## PYMNTS.com

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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 [paytronix.com](https://paytronix.com).

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# RESTAURANT READINESS INDEX