

ORDER TO EAT TRACKER®

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Jack In The Box: How Digital-First Loyalty Experiences Power Consumer Engagement

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38 percent of consumers recovering from pandemic-related economic issues use at least one QSR loyalty program

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Why restaurants are accelerating their digital investments to improve retention and gain wallet share





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WHAT'S INSIDE



A growing number of consumers worldwide are gaining access to vaccinations, leading to broad changes in how they shop, spend and dine. Dine-in service has **made** a relatively modest comeback over the past several months, especially in the United States. Some consumers starved for in-person meals and social interaction slowly are beginning to make their way back to their favorite eateries with friends and family members.

There may be a moderate resurgence in in-person dining, but the digital innovations that have **enabled** consumers to more conveniently order and pay for their food remotely are still in place. Many restaurateurs are left wondering which pandemic-driven strategies and solutions will fall out of favor and which will stick, as many key features, including delivery services, pickup options and touchless payment capabilities, still are seeing heavy usage.

One thing has been clear, however: Quick-service restaurants (QSRs) are continuing to leverage

loyalty and rewards programs to drive sales. These offerings provide restaurants with a wealth of customer data that can help them bolster their ongoing marketing efforts and boost personalization. They also are key to helping economically rattled consumers stretch their dollars and stick to their budgets, as **evidenced** by the 45 percent of restaurant patrons who have enrolled in such programs within the past six months. This underscores why it will be critical for restaurants to incorporate loyalty programs into their strategies for success so that they can preserve their wallet shares.

AROUND THE ORDER TO EAT SPACE

Restaurants continue to face their share of pandemic-related challenges, including strained supply chains and strained staffing levels. These issues **contributed** to a 0.8 percent increase in the average cost of dining out in July — the largest monthly spike since 1981. Nevertheless, restaurant spending has observed robust increases in recent months, with such spending **rising** 32 percent in Q2 2021 compared to the same quarter last year. This

indicates that consumers are eager to spend money and dine out after 18 months of pandemic-related restrictions, even if doing so comes at a slightly higher price than it did last year.

Some restaurant chains are continuing to see success with delivery-driven innovation. Pizza behemoth Domino's, for example, [saw](#) its 2020 revenues top \$4.1 billion, buoyed by remote ordering options such as car-side delivery as well as its Piece of the Pie rewards offering. Its digital strategy played a key part in helping it become the seventh largest restaurant chain in the U.S., highlighting the continued importance of delivery and digital even as in-person dining ramps up.

Loyalty programs also remain a strong selling point for QSRs across all channels. Restaurant Brands International (RBI) – the parent company of Burger King, Tim Hortons and other QSRs – recently announced that it is rolling out a loyalty offering for Popeyes after its other brands experienced success with such programs. RBI made the move after noting that loyalty programs contributed to a stunning 60 percent of its year-over-year digital sales growth in Q2 2021, illustrating just how interested consumers are in these offerings.

For more on these stories and other order to eat headlines, read the Tracker's News and Trends section (p. 11).



HOW PROVIDING DIGITAL-FIRST LOYALTY HELPS JACK IN THE BOX STRENGTHEN CUSTOMER RELATIONSHIPS

It has become even more challenging for eateries to capture the attention of diners in a world in which they have endless options for ordering while browsing on their phones at home. Offering today's diners incentives such as loyalty points or rewards is one way restaurants and QSRs can entice consumers who are interacting with them via online channels. In this month's Feature Story (p. 8), Ryan Ostrom, chief marketing officer for fast food restaurant [Jack in the Box](#), explains why offering personalized loyalty and rewards experiences is helping the burger chain strengthen the brand's relationships and why meeting consumers in their channel of choice is key.

DEEP DIVE: HOW QSRs CAN STRATEGIZE TO GAIN WALLET SHARE, IMPROVE CUSTOMER RETENTION

Despite much uncertainty, early indicators show that increased digital ordering at restaurants is a trend that is bound to stick, and restaurants want to lead the pack with digital innovations to keep customers engaged. Part of the comprehensive digital strategies many QSRs are rolling out are loyalty programs built into existing mobile apps, which can alleviate the costs of acquiring new business by retaining loyal customers. Industry giants including McDonald's, Starbucks and Chipotle were quick to adopt loyalty programs during the pandemic, and others now are trying to follow suit. This month's Deep Dive (p. 15) examines the current loyalty program landscape, early successes from those who have invested in their digital strategies and what is required to initiate a strategic transformation.

EXECUTIVE INSIGHT

How has the pandemic altered consumers' usage of restaurant loyalty and rewards programs? What do these changes mean for the future of loyalty and rewards in the restaurant industry?

"Research shows us that restaurant customers crave loyalty rewards, and from our years of work in this field we know that points and rewards drive additional spend. That's where we are today.

The major shift for restaurants is in how they can use these rewards and the data collected through them to create personalized experiences. Learning customer preferences — whether that's ... dietary, time of day, visit frequency or any other trackable detail — enables the brand to use that information in unique ways that keep the customer coming back and spending more. That personalized experience isn't limited to the loyalty program; it should extend through the entire customer journey, including through an app on the phone, through a kiosk at the restaurant or from the person at the host stand. No matter how the customer chooses to interact, their experience can morph and adjust just for them. This way, a person who always orders the gluten-free option will see that first on the menu, while a 'meat lover' may get that option up top.

Ultimately, a brand must think through the customer experience holistically and look at how rewards fit into it, not just as a customer retention tool but as the data engine that drives the brand."

CHARLES GRAY

Chief revenue officer
[Paytronix](#)

75%

Share of restaurants that expect their 2021 revenues to be on par with or exceed their 2019 revenues

67%

Portion of the average restaurant's revenues generated via online or phone orders

40%

Share of restaurants' total sales generated via digital ordering options

16%

Portion of restaurant customers who are more inclined to order from restaurants with loyalty and rewards features

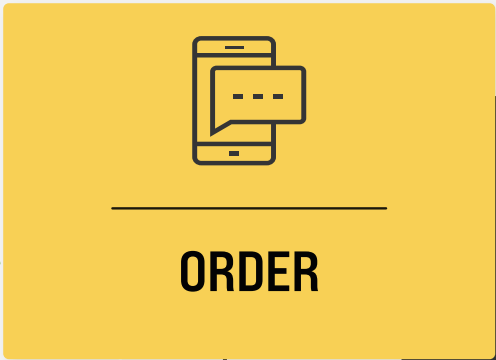
51%

Share of restaurant customers who say loyalty and rewards programs will be critical to restaurants' success in the future

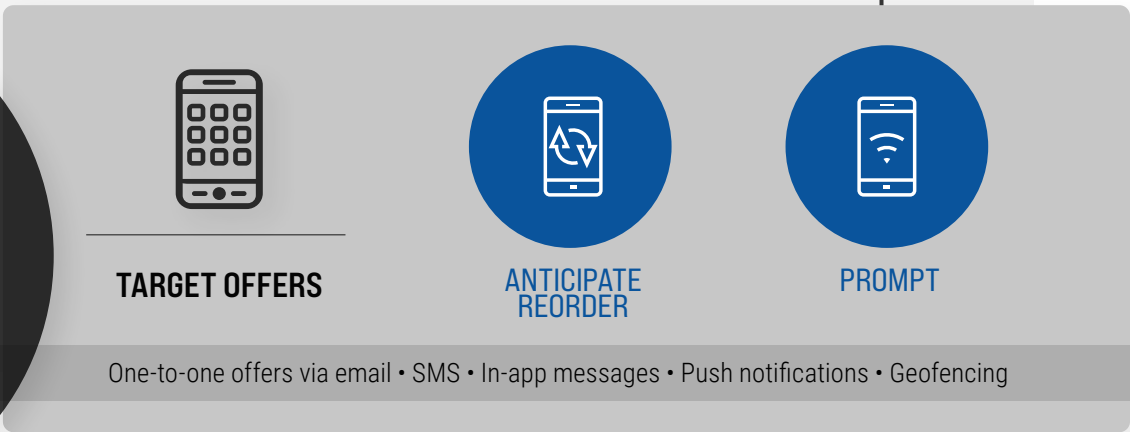
FIVE FAST FACTS



ECOSYSTEM



BUILDING
CUSTOMER
PROFILE



FEATURE STORY

**Jack In The Box:
How Digital-First Loyalty
Experiences Power
Consumer Engagement**



Catching the attention of consumers who are spoiled for choice is no easy feat, especially in the restaurant space, in which diners not only have their pick of eateries but also are presented with numerous channels from which they can order. Today's restaurants must offer potential diners fresh, appetizing fare while also ensuring order and pickup or delivery is as easy as possible and feels personal — even when customers are ordering through impersonal digital channels, explained Ryan Ostrom, chief marketing officer for fast food restaurant **Jack in the Box**. The San Diego-based burger chain has focused on digital channels first and foremost with its recently **launched** loyalty program, he continued, taking advantage of the wealth of customer data present online to help build out offers that speak to diners' preferences.

"[The] QSR business is a big cash business and, historically, customer data and understanding who our consumers are, [who] our guests [are], has not been widely available," he explained. "And through these digital platforms, these digital use cases, we now can really provide more personalized experiences, personalized offers and better communication, as I like to say, 'at the point of hunger' with our core guests, by building these digital relationships with them. That's why we moved with urgency with loyalty."

Creating a digital-first loyalty experience can help eateries gain the interest — and hopefully the continued business — of consumers who are expecting to order how and where they like from their chosen eateries. This means QSRs must keep track of the perks they are offering within their loyalty programs as well to ensure they are matching customers' shifting ordering and payment preferences.

WINNING THE DIGITAL LOYALTY GAME

Diners today are growing more comfortable turning to their phones first when they are on the hunt for meals, making an easy-to-use mobile app ordering experience a priority for eateries, Ostrom said. The trick is to keep customers coming back, which is why providing loyalty incentives that feel personalized can present a key advantage to attracting digital-first diners.

"At the end of [the] day, digital is the forefront of our experience and so, right now, it's all about getting our core guests to download and engage with the brand," he said. "So, when you download the app, you receive 25 percent off your first [app] purchase ... and, right now, [customers earn loyalty] through digital channels, do [by] ordering through our app."

Jack in the Box is far from the only QSR leaning harder on loyalty to engage consumers. Restaurants including McDonald's, Burger King and Wendy's all have recently **expanded** their loyalty programs nationally to win consumers' favor, putting more pressure on restaurants to craft rewards programs that speak to shifting consumer desires. Jack in the Box will be bringing back a popular menu item this October, for example, and will be offering its loyalty members exclusive rewards and other perks tied to the resurgence of this new mystery item in a bid to strengthen the relationship between the brand and these members, Ostrom explained. The chain also will be examining how it can craft offers and rewards for loyalty members across all of its channels to keep their interest, he continued.

"That's really the benefit of a loyalty program within our channel, really building that direct relationship with our guests," Ostrom said. "But we do plan on making sure that they have the value or [that the]

offers will be available in-store and online, and we'll have different offers in different channels. It's all about understanding the power of the data and the information that we get [about] what channels [customers] like to purchase in. What are the key drivers that get them to come purchase and how do we leverage that data to provide ... guests the best offer at the right time and get them to engage and to purchase?"

Consumers may be more comfortable interacting with eateries through digital channels, but that does not mean they have fully forsaken the in-store dining experience. Bringing loyalty into physical stores therefore is the next phase for Jack in the Box as it looks to improve engagement with consumers who may be digital-first but are far from digital-only.

TAKING LOYALTY OMNICHANNEL

Many customers are using drive-thrus to order their meals or order online, pickup in store features, meaning QSRs must continue to take the physical channel into account as they look to gain the loyalty of more customers. This is causing Jack in the Box to reconsider the design of its physical locations as well as how to tie its loyalty program into these next-generation eateries, Ostrom said.

"Right now, as we think about the in-store experience, it's really about making sure that people who purchase in stores still have the same offers and deals to get them to want to go to our stores if that's where their preferred [purchase] method [is]," he explained. "I think, eventually, where you see this evolving ... really similar to online, is that recommendation engine, which is, generally, would you like [a] large fry with that, because, generally, this person upsells or doesn't upsell. I know a lot of other restaurants that execute [these kinds of] recommendation engines. It's really about how to bring that to life and that's in our future. That's not immediate. I think, ultimately, our goal is to provide the best value for our guests and consistency across digital and in-store, which is our next step within our loyalty program."

Bringing recommendations and other such perks to loyal customers regardless of channel may help to bring that critical sense of personalization to consumers who more often than not are heading online first to order food. This may be a key way QSRs can better engage with consumers who are expecting to dine their way, regardless of how they are interacting with their favorite restaurants.



NEWS & TRENDS



Pandemic-driven restaurant loyalty trends

WHILE THE COST OF FOOD SOARS, RESTAURANT PATRONAGE SURPRISINGLY INCREASES

Supply chains remain sluggish in the wake of the pandemic, and these issues are having a ripple effect on costs downstream, affecting the prices of line items at restaurants. One [index](#) showed that the cost of dining out increased by 0.8 percent in July — the largest monthly cost spike reported since 1981. While restaurant owners are expressing concern over the growing cost of food and how it will impact their margins and customer loyalty, spending at restaurants continues to show notable increases. [Research](#) reveals that consumer spending grew by 32 percent from April to June compared to the same period last year, with QSR spending increasing 15 percent year over year for the same period.

This growth likely is an indicator that consumers are ready to spend money and visit stores in person after more than a year of pandemic-related restrictions.

RESTAURANT CUSTOMERS TURN TO LOYALTY PROGRAMS AMID PANDEMIC-DRIVEN FINANCIAL UNCERTAINTY

Restaurant spending may be up, but recent research shows that Americans still have numerous concerns about their financial futures after 18 months of pandemic-related economic uncertainty. One recent [survey](#) found that 67 percent of consumers who faced financial hardship during the pandemic still are “very” or “extremely” concerned about its ongoing effects. Sixty-six percent believe they will never fully recover from the financial impacts they faced in 2020.

Many consumers are looking for ways to stretch their funds rather than restricting their spending entirely, however, and restaurant loyalty programs are gaining appeal among a growing number of

customers. PYMNTS [research](#) found that 49 percent of customers facing financial difficulties use at least one loyalty program, for example, with 38 percent of those consumers specifically relying on the loyalty programs at QSRs. This suggests that loyalty programs can give restaurants a reliable tool through which they can encourage repeat business and provide customers with discounts and specials that allow them to spend while sticking to their budgets.

RESTAURANTS LEANING HEAVILY INTO DIGITAL, DELIVERY INNOVATIONS

Services such as delivery have [experienced](#) tremendous growth during the pandemic, but labor shortages, product supply gaps and health-related restrictions have changed many restaurants' operational processes irrevocably. Numerous QSRs have adjusted their wages and signing bonuses to stand

out to employees as the hiring landscape becomes more competitive, while other restaurants have turned to automation to cover the gaps in staffing. Another growing trend, particularly among QSRs, is the use of ghost restaurants that serve customers exclusively via delivery. The ghost restaurant market ballooned to \$45 billion in 2021, indicating the extent to which delivery has become a key part of restaurants' success strategies.

Restaurants that have seen their processes evolve during the pandemic believe that these transformations will prove critical once the health crisis has ended and serve as catalysts for additional changes. Experts predict the most successful restaurants of the future will continue to capitalize on the features on which customers began to rely during the pandemic, such as contactless delivery, outdoor seating and customer loyalty programs.



The drive toward delivery

DOMINO'S DELIVERY-DRIVEN GROWTH ILLUSTRATES POTENTIAL IN EMBRACING DIGITAL TRANSFORMATION

Many restaurants found the increased restrictions and dwindling staff counts of 2020 particularly challenging, but some brands shifted gears with digital innovations. Pizza giant Domino's undertook numerous digital initiatives that helped it **grow** into the seventh-largest restaurant chain in the U.S. The chain's revenue in 2020 topped more than \$4.1 billion as it introduced digital-oriented tools including its car-side delivery service and Piece of the Pie rewards program. It also announced that it is looking to shrink its delivery radius for more efficient service while simultaneously working to boost the number of patrons who order for pickup. The success of these and other digital efforts show that QSRs would be wise to continue prioritizing digital innovation even as restaurants reopen, as consumers' digital tastes are here for the long term.

DATA SUGGEST QSRs SHIFTING AWAY FROM DELIVERY ARE DOING SO AT THEIR OWN PERIL

The delivery industry's growth continues to impress, with the space **expanding** more than 124 percent year over year in March. More than 90 percent of consumers say their reliance on delivery increased as a direct result of the pandemic. QSRs are benefiting the most from this shift, with delivery increasing by 23 percent for Mexican QSRs, 20 percent for chicken chains, 16 percent for burger QSRs and 14 percent for pizza chains.

The fate of many restaurants' digital and delivery offerings could change now that dine-in services

are making headway again, however. Research suggests that convenience alone will not be enough to keep consumers loyal, and restaurants also must focus on addressing customers' qualms regarding delivery fees and food quality issues related to slow deliveries. This means reimagining the delivery process and examining ways to simplify menus, capitalize on ghost kitchens and highlight incentives such as loyalty programs will be crucial to helping QSRs maintain delivery growth and boost revenue.



Loyalty program enhancements to encourage repeat business

RBI ANNOUNCES LOYALTY PROGRAM FOR CHICKEN CHAIN POPEYES AMID SUCCESSES WITH OTHER BRANDS

Loyalty programs also are mainstays in QSRs' digital innovation plans, and recent research found good reason for them to continue these investments. RBI — the parent company of QSRs including Burger King and Tim Hortons — recently **announced** that it is rolling out a loyalty offering for Popeyes. The chicken chain is the last under the RBI umbrella to adopt a loyalty program, and the company said it decided to institute the offering after witnessing the success of these programs in its other brands.

RBI noted that the loyalty programs at its establishments contributed to a stunning 60 percent growth in year-over-year digital sales in Q2 2021. Tim Hortons' loyalty program has been particularly successful, with rewards members accounting for more than 75 percent of all digital sales during the same period. RBI plans to continue evolving its loyalty programs and digital approach, and it is working to create an omnichannel strategy for a more holistic end-to-end customer experience.

EL POLLO LOCO LEANING ON LOYALTY PROGRAM, DIGITAL SALES AS IT CHARTS PATH TOWARD RECOVERY

Popeyes is not the only chicken chain investing in a loyalty program. California-headquartered El Pollo Loco recently **noted** that its loyalty offering is

powering incremental average checks compared to nonmembers' spending. The chain noted that it has added 330,000 participants in 2021, and it claimed that loyalty program transactions grew 14 percent between Q1 and Q2. CEO and President Bernard Acoca noted that the program also is driving increases in the frequency of members' visits as well as their transaction amounts.

El Pollo Loco is facing several hurdles that are confronting many QSRs as they work to rebound from the pandemic. The chain is experiencing increased costs for food and labor, and it plans to boost the prices of its menu items by 2 percent to 3 percent to compensate. Still, the overall trend toward higher digital sales and increased loyalty program usage bodes well for the QSR's rebound, according to Acoca.

SANDWICH CHAIN PANERA EXPANDS CATERING SERVICE ACCESS TO LOYALTY PROGRAM MEMBERS

Other QSRs are working to expand the features and options they offer to loyalty program members. Fast casual sandwich chain Panera, for example, recently **revealed** that it was opening access to its catering business, Panera Connects, to its roughly 40 million loyalty program participants. The catering option thus far has been available only to business clients, but anyone with a credit card and a loyalty account now will be able to tap the service for personal celebrations.

Panera also is offering a Panera Day at Work option that aims to replace the functionality of office cafeterias, many of which have not reopened at office buildings. The service enables employees to order food for delivery at a discount, and recipients' meals are delivered all at the same time.

DEEP DIVE



Doubling Down On Loyalty Programs And Digital Investments To Boost Retention And Wallet Share

With spending up across all digital mediums, businesses from many sectors are rushing to learn how they can optimize their digital strategies to meet consumers where they are most active. Research from the U.S. Census Bureau indicates that the medium most useful for attracting customers is digital. Consumers **spent** \$211.5 billion online during the Q2 2021, in fact — a nearly 32 percent increase since Q1 2020.

As a result, restaurant industry innovators are adopting and deploying strategic digital transformation measures to drive revenue and increase retention of existing clientele. As part of the digital transformation, restaurants are looking beyond basic capabilities in mobile apps to see which features could have the stickiest impact. Stickiness

in the restaurant space — or when a first-time customer becomes a repeat patron — is an essential outcome of digital transformation because of its cost benefits in this particularly competitive industry. Research **shows** that the most stable restaurants earn between 25 percent and 40 percent of their total revenue from repeat business, for example.

Repeat customers are far less expensive for restaurants, too, as research shows that acquiring new patrons can cost as much as 30 times more than maintaining positive relationships with existing customers. Furthermore, satisfied customers who give restaurants repeat business spend approximately 67 percent more than new customers. As the pandemic shifted customer shopping patterns toward digital ordering and delivery and as more

restaurants embraced these changes, customers not only have more options for spending their money but they also have greater expectations for variety and convenience. The following Deep Dive examines why securing customer loyalty matters now more than ever as opportunities have opened to improve retention and wallet share.

INCREASING CUSTOMER LOYALTY THROUGH DIGITAL MEANS

One strategy specifically devoted to the surprise and delight stage of the customer journey, at which repeat business often is won, is customer loyalty programs. More than half of restaurant patrons **said** loyalty programs are a major factor in a restaurant's long-term success. A disconnect exists between consumer demands and restaurant operators' actions, however, with only 36 percent of restaurant managers saying they include these programs in their long-term growth strategies.

Recent examples of loyalty program successes may be a driving factor that changes the perceptions and strategies of restaurateurs, though. Fast-food giant McDonald's first **launched** its mobile app in 2015, for example, and added mobile ordering capabilities in 2017. Amidst the pandemic, however, McDonald's **realized** its digital offerings had fractures in the holistic end-to-end customer experience, and its app needed to evolve to better retain customers as competition for mobile ordering and delivery grew. McDonald's thus launched MyMcDonald's Rewards in July. The loyalty program launched alongside other marketing efforts such as "Famous Orders," a special menu featuring favorite orders from celebrities including Travis Scott, Saweetie and BTS. The coordinated efforts of the loyalty program and promotional pushes

resulted in the McDonald's app **landing** as the number one most downloaded app throughout the summer in the U.S., gaining increased awareness from trending hashtags on Twitter, a measurable uptick in repeat business and increased usage of its mobile app.

McDonald's is not the only QSR to find success with loyalty programs as a central part of its digital strategy, either. Taco Bell, Chipotle Mexican Grill and Starbucks all have **reported** loyalty program-driven digital sales growth. Chipotle is a prime example of measurable growth, as the QSR saw a more than 177 percent year-over-year increase in digital sales after its loyalty program grew by 10 million users in 2020.

INVESTING IN THE DIGITAL TRANSFORMATION

QSRs that have found success in digital strategies have taken a cross-department approach to updating existing processes and technical infrastructure to accommodate shifting consumer patterns. Research shows that concerted efforts to reallocate budget toward digital spending and connecting marketing efforts to propel adoption are key components to a successful digital strategy.

Digital spending also must increase. Domino's Pizza has been technologically advanced since 2008, when it first **built** its IT capabilities that allowed for real-time order tracking — an unheard of technology at the time. The pizza chain has continued to invest heavily in its digital presence over the years, such as its loyalty program, curbside pick-up and increased online ordering capabilities, all introduced in the pandemic's wake. Domino's agility would be impossible without a centralized focus on improved digital capabilities, and the company's

future-proofing has paid off. Research shows that a \$7,000 investment in Domino's stock in 2008 currently would be worth more than \$130,000.

As technology stacks at QSRs continue to evolve and become more intelligent, marketing efforts should capitalize on the new source of intelligence and align with new business objectives. The coordination between service and marketing is best shown through the launch of McDonald's loyalty program in conjunction with its Famous Orders campaign and the success in app downloads the burger giant found as a result. Other tactics include leveraging consumer data collected via loyalty programs to localize and personalize content for improved customer experience. Additionally, understanding where to meet consumers increases the odds of messaging resonating. Forty-five percent of consumers said email is the most relevant source for content and news from QSRs, for example.

Change is afoot, and QSRs that continue monitoring consumers' spending habits and are agile in adopting new technology and initiating rewards programs to increase loyalty and retention will continue to lead the pack in wallet share in this hypercompetitive industry.





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 (QSRs). Once implemented, these can be used to help establishments elevate their brand profiles. Its offerings also can 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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