

ORDER TO EAT TRACKER®

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Information on [PYMNTS.com](https://pymnts.com) and Paytronix

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WHAT'S INSIDE



If the past 18 months have taught the restaurant sector anything, it is that the best way to attract and keep customers is to optimize their digital strategies. Consumers understandably have been eager to take more of their spending online during the global health crisis as health and safety measures keep many from dining in at eateries. The United States Census Bureau recently reported that consumers spent \$221 billion online in Q2 2021, a nearly 32 percent increase from Q1 2020.

This digital spending shift, in turn, has pushed the sector to adopt strategic digital tools that can help drive profits and satisfy existing patrons. Retaining long-term customers remains a key goal, especially as restaurants earn as much as 40 percent of their revenues from repeat business. Giving these consumers seamless and convenient service requires constant innovation. This has increasingly meant meeting them with mobile technologies to put their ordering options and loyalty programs at their fingertips.

One key factor behind quick-service restaurants' (QSRs) strategies for success has been to focus on the mobile experience, especially apps. These offerings have helped restaurants reach customers with curbside pickup options, contactless ordering methods and more, all of which have proved invaluable to keeping their operations afloat during the past 18 months. Another crucial component of a successful innovation strategy as digital eclipses dine-in ordering is the loyalty program. PYMNTS' recent Restaurant Readiness Index is unequivocal in showing that customers value these offerings and are willing to buy and spend more when such programs are available. Tapping into mobile tools and tailoring loyalty programs to the consumers using them is likely to grow in importance, even as consumers return to dining in.

AROUND THE ORDER TO EAT WORLD

QSRs are no strangers to harnessing the power of mobile apps, and research shows that major players are dominant in the space. McDonald's led the pack in app downloads for August, according to recent findings, notching 2.8 million during the month. Starbucks came in a distant second with 1 million app downloads during the same period, followed by Domino's Pizza at 941,000. McDonald's has made steady gains in app downloads this year, illustrating consumers' ongoing demand for mobile ordering solutions even as dine-in service resumes across much of the U.S.

The data accompanying customers' mobile app usage and purchasing can also help restaurants hone their digital strategies. Recent analysis has shown that many top-performing restaurant chains in the U.S. benefited from implementing robust digital strategies before the pandemic hit, giving them an advantage as consumers began ordering online and via mobile. Smaller eateries and those late to

innovate their digital processes still have options at their disposal, however. Many can use the customer data they are acquiring via mobile apps and other digital programs to ensure they are hitting the mark with products and services, including launching tailored email campaigns and other initiatives to promote loyalty.

Some QSRs have also begun to experiment with subscription programs in a bid to drive customer spending and boost loyalty. Fast casual giant Taco Bell, for instance, recently launched a 30-day trial for a subscription service at 17 locations in Arizona. The offering, called the Taco Lover's pass, allows users to pay between \$5 and \$10 per month to access exclusive perks, including receiving a free taco each day. The QSR is betting that this feature will drive increased spending and engagement among patrons.

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



BLAZE PIZZA ON PUTTING DIGITAL INNOVATION ON THE MENU FOR TODAY'S MOBILE-FIRST CUSTOMERS

Many restaurants had at least dabbled in digital innovation before the events of March 2020, but consumers' sudden and dramatic shift to remote ordering caught many QSRs off guard. As a result, many eateries worked to up their games digitally and meet consumers on the mobile channels they now crave. In this month's Feature Story (p. 8), Vincent Szwajkowski, brand and growth leader of fast casual pizzeria [Blaze Pizza](#), explained why tapping into technologies and loyalty programs that leverage mobile channels holds the key to keeping customers satisfied and driving long-term engagement.

DEEP DIVE: TAKING A MOBILE-FOCUSED APPROACH TO DRIVING RESTAURANT SPENDING

The pandemic has kicked restaurants' implementation of mobile ordering tools and rewards programs into high gear, and many eateries have sprinted to update their platforms to meet evolving customer expectations and maximize profits. This month's Deep Dive (p. 15) explores the importance of mobile technologies such as smartphone apps and how restaurants are pairing mobile and digital ordering solutions with compelling loyalty programs to satisfy consumers' need for convenience, increase loyalty and boost spend.

EXECUTIVE INSIGHT

Loyalty and rewards programs continue to be valuable tools that help restaurants drive spend and boost loyalty. How can restaurants tailor their loyalty programs to customers' mobile-first preferences while meeting their rewards needs across other channels?

"The mobile device is now a primary stop on a typical guest journey, which means brands must pay careful attention to this channel. More than a stagnant billboard, it's a key part of a brand's digital presence, no matter whether a guest is ordering for delivery or coming in to dine on-premises. With that in mind, a mobile app, whether that's a stand-alone app or a mobile web presence, must first be on-brand, but must also be intertwined with the full digital guest ecosystem, including loyalty and digital ordering platforms. The images must be perfect, the navigation smooth and the menu must reflect exactly what's available at the time. Just as you would tell a person ordering in-person that a certain item is sold out, you want the customer to have the same experience on their phone. This means that the mobile presence must be constantly updated and integrated fully with what's happening on-site.

That same concept applies to loyalty rewards. It's not enough to just let people earn and use rewards on-site; they must have that same experience on their phone. This loyalty data offers a tremendous opportunity for brands in that the historical information gained as part of a loyalty program can make the mobile interaction better, more personalized and more optimized. The menus that each individual sees can change based on their own history, just as we see in the rest of the online retail world."

ANDREW ROBBINS

CEO

[Paytronix](#)

40%

Share of restaurants that generate sales via online, mobile app, third-party aggregators or other digital ordering options

14%

Portion of the average restaurant's revenues generated via mobile order-ahead

13%

Share of customers most likely to purchase from restaurants that allowed them to order online

53%

Portion of customers who prefer to receive restaurant rewards via mobile app

7%


Share of restaurants more likely to offer mobile app-enabled ordering options than they were last year

FIVE FAST FACTS

ECOSYSTEM



ACQUIRE CUSTOMERS



ORDER



EAT



WEB APP STORE

PAYMENT

REWARD

REDEEM

IN RESERVATION

OUT DELIVERY

BUILDING CUSTOMER PROFILE



IDENTIFY PREFERENCES



TARGET OFFERS



ANTICIPATE REORDER



PROMPT

One-to-one offers via email • SMS • In-app messages • Push notifications • Geofencing



FEATURE STORY

**Blaze Pizza On Firing Up
Mobile-First Experiences
That Go Long On Loyalty**

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BLAZE
PIZZA

KEEP IT
REAL
HOLDING BLAZE
RESERVATION
SCHEDULED

BLAZE
PIZZA

It has been more than a year and a half since the pandemic turned restaurants' operations upside down. Eateries have had to abide by social distancing rules and capacity limits while tapping into technologies such as contactless payments and upgraded loyalty programs. Before the pandemic, these innovations were often considered conveniences, but they have since become essential to doing business in the space.

Off-premise ordering, delivery and pickup are likely to continue seeing growth even as eateries see customers return to their dining rooms, with one-third of consumers saying they have no plans to return to their pre-pandemic dining habits. It has also become clear that mobile and digital ordering options, as well as advanced rewards programs, have put restaurateurs in the driver's seat to serve takeout and dine-in patrons and improve customer satisfaction.

Blaze Pizza, a fast casual pizzeria with 335 locations across the U.S., Canada and the Middle East, is leaning into digital and mobile innovations. The California-based chain launched in 2012 and offers pies with a variety of crusts and toppings, allowing customers to select ingredients as their pizzas move down the line once they order.

Vincent Szwajkowski, Blaze Pizza's brand and growth leader, said in an interview with PYMNTS that the chain's focus was primarily on non-digital innovations before the pandemic. As many as 85 percent of diners chose to dine in or order pizza on-site and take it with them, while the chain's share of sales through digital and mobile ordering channels was in the single digits, he said. Customers would come in, walk down the line and build their pizzas even if they were taking them to go.

Blaze's business model required an overhaul seemingly overnight once the global health crisis hit, however. Szwajkowski said the chain's digital shift had to be dramatic and lightning fast because it was not built for the new normal. The chain's digital business now accounts for 40 percent of its sales, he said, while in-store purchases make up 60 percent of sales.

"Everything was turned on its head operationally, and it was challenging," Szwajkowski said. "In addition to all the technology aspects of it, partnerships ... and [our] loyalty program [were] upended. As a result, our digital business grew by 150 percent year over year in a week."

MODERNIZING THE MOBILE EXPERIENCE

Streamlining and updating the mobile experience has also been a key consideration for QSRs eager to keep up with the shift. Many rely on mobile ordering options and apps to reach customers remotely. Blaze originally introduced an app three years ago, but Szwajkowski acknowledged that it was a relatively basic tool that simply allowed customers to place orders and access its loyalty program. The brand went through a website redesign in 2019 and upgraded its loyalty offering, Flames, which he said saved it during the pandemic.

The latest version allows patrons to earn one "flame" for each \$1 spent, and these flames can be redeemed for free food. The company also has worked to add exclusive offerings, such as an option for large pizzas, for customers who use its app.

"The app was ultimately used as a way to get ongoing engagement with our guests," he said.

ONGOING MOBILE INNOVATION

The chain's investments in mobile solutions have not stopped there. Blaze relaunched its app in September with a news feed and push notifications, and the company said these developments have been crucial to driving growth.

Building interactivity into the mobile experience also has become a top priority, Szwajkowski said. Patrons said they wanted to be able to build their pizzas digitally, and the company has worked to meet their expectations by enabling its app and website to display pictures that mirror the in-person experience of choosing toppings.



"Customers told us, 'I really love the experience that I get in the restaurant. I love the smells of the meats and vegetables,' and that inspired us to bring more photography forward," he explained.

More enhancements still are needed as QSRs recalibrate their strategies for digital and mobile ordering. Szwajkowski said one of the biggest challenges is fixing a digital order that had disappointed a customer, such as when a pizza was delivered with the wrong ingredients. Customers who experience these issues while dining in can always send their orders back, but this is not an option for customers dining remotely.

Taking loyalty and rewards programs to the next level is yet another goal. Simply allowing customers to earn and spend rewards is considered a basic loyalty program function, but restaurants that want to stand out will need to create unique perks that drive engagement further.

"As we go into 2022, one of our focus areas is how to increase the value proposition within our reward program that goes beyond spend and redeem," Szwajkowski said. "There's an opportunity for us to create more of an inclusive yield with our loyalty program members and provide more of a community environment."

Meeting evolving consumer demands and expectations requires restaurants to implement digital and mobile tools that improve their in-house operations and power more satisfying consumer experiences. Tailoring their apps and mobile experiences, as well as the loyalty programs they offer via these channels, to suit customers' new digital tastes will prove invaluable in the years ahead.

NEWS & TRENDS



Mobile ordering and loyalty initiatives

ROUGHLY 60 PERCENT OF DIGITAL ORDERS ARE BEING PLACED VIA MOBILE APP

Mobile food ordering has caught on dramatically during the global health crisis, and newly released research shows just how critical the channel has become to consumers. A [study](#) of more than 4.3 million restaurant orders in the past 18 months revealed that nearly 60 percent of orders placed digitally were via mobile app. The survey also found that digital revenues still account for roughly half of all restaurant sales, though they are expected to remain a crucial source of revenue as eateries rebound from the pandemic. This also means that restaurants without mobile apps are forfeiting a considerable share of revenues by failing to provide customers with one of their most preferred ordering methods.

Restaurants also are understandably eager to bolster their digital and mobile ordering innovations

amid these trends. A separate [study](#) found that investment in digital tools remains a top goal for eateries this year, noting that while the pandemic accelerated the digital migration, it is expected to continue long term.

McDONALD'S APP DOWNLOADED BY 2.8 MILLION US CONSUMERS IN AUGUST

Yet another testament to mobile apps' power within the restaurant space is the growing number of consumers who continue to download them to purchase their meals. New data [shows](#) that fast food titan McDonald's leads the pack, notching 2.8 million app downloads in the U.S. in August. Starbucks came in second during the month with 1 million app downloads, followed closely by Domino's Pizza at 941,000. Research points to several factors behind McDonald's success in driving app downloads, where it has led in all but four quarters since 2015. The fast food giant continues to spend more than most of its rivals on advertising efforts, including pulling celebrity endorsements into the fold.

Other eateries have made waves in recent years with incentives to boost app downloads. Chick-fil-A was the big winner in Q1 2020 when it gave away free nuggets to anyone who used its mobile app to sign into their account. Starbucks and fellow coffee giant Dunkin' also see sizable numbers of app downloads in any given month, as both offer relatively popular loyalty programs integrated into their mobile channels and offer order-ahead capabilities.

WHY RESTAURANTS MUST FOCUS ON OMNICHANNEL CUSTOMER SERVICE, ORDERING STRATEGIES

Customers may be fans of the mobile ordering experience, but they still value the ability to use multiple channels when they place their orders and pay for their meals. Participants in a recent webinar [highlighted](#) several suggestions about how restaurant brands can supercharge their customer experiences now and once the pandemic ends. Scott Compton, a senior analyst at market research firm Forrester, said in-store purchases still

will have a place in many industries, noting that nearly three-quarters of the nation's retail sales will occur at brick-and-mortar locations within three years. This, he explained, is a strong indicator of what is likely to happen in the restaurant space. At the same time, eCommerce is anticipated to grow at 15 percent annually as mobile becomes consumers' go-to ordering channel. Restaurants that fail to focus on mobile innovations will be left behind, he said.

Jarred Norris, vice president at business reputation management firm Chatmeter, said leveraging technology to control the customer journey will be critical in the months and years ahead. He explained that restaurants must adapt to the new normal regarding customers' preferences rather than returning to their previous operational strategies. Foot traffic will be less of a driving force, meaning restaurants will need to rely on their branding, emphasize health and safety and be willing to meet customers across channels to win their loyalty.



Harnessing customer data

HOW DINING ON CUSTOMER DATA CAN HELP RESTAURANTS REDEFINE ENGAGEMENT

Restaurants' digital shifts were underway even before the events of March 2020, and recent analysis [shows](#) that eateries must continue to innovate how they use digital channels to engage customers. Restaurant and coffee chains Chipotle, Starbucks and others had long been building their digital operations, which put them at a distinct advantage when the pandemic dramatically curtailed or shuttered their brick-and-mortar operations. Other eateries, including some larger players, were caught off guard when the shift occurred but worked quickly to revamp their digital ordering technologies to satisfy guests across different channels. Customer engagement once hinged mostly on preparing restaurant workers to handle guests' experiences on-site, but delivering standout service increasingly requires a focus on digital engagement via apps, the web and through outreach with targeted email campaigns.

RESTAURANTS RELYING ON CUSTOMER DATA TO BLUNT PANDEMIC-DRIVEN PRICE HIKES

The economy is on the mend, but restaurants of all types have faced price hikes stemming from rising labor costs and strained supply chains. One [survey](#) found that 70 percent of restaurants have raised prices so far in 2021, with QSRs increasing prices an average of 6 percent, compared to 3 percent for fast casual chains and 1 percent at casual dining establishments. Some restaurants are working to mitigate this issue by altering their menus to lower overhead costs, but this tactic might not be

enough given consumers' digital shifts and reliance on quick and easy meals during the last 18 months.

One untapped source that promises to help restaurants save costs is the data they collect. Many chains offer mobile apps that collect a myriad of customer data points, allowing them to understand how diners order in addition to what they eat. Analyzing this information to establish customers' order habits can give restaurants valuable information about effective opportunities to upsell and send out special offers, tools that likely will prove crucial to battling price increases.



Restaurant innovations

HALF OF US RESTAURANTS ROLLING OUT NEW PRODUCTS, SERVICES AS MORE CUSTOMERS DINE IN

Dine-in service is making a triumphant comeback in many parts of the U.S., but this does not mean restaurants simply can coast on their existing operational models and services. A new [study](#) determined that nearly half of all U.S. consumers are willing to spend more on dining out, but getting customers back through the restaurant doors is not enough for restaurants to keep customers loyal. The survey highlighted how restaurants are turning to innovation to stay competitive, with 50 percent of eateries introducing fresh products or services to meet customers' needs.

Experts have outlined several key factors to which restaurants must adhere to see success in the years ahead. Continued digitization will be necessary, as it helps boost convenience and speed. Adopting technologies such as artificial intelligence (AI) will also be critical to giving customers more information about their orders and ensuring employees are following safety protocols. Lastly, restaurants must leverage any digital integrations or technologies into the dine-in experience to make sure they meet or exceed customers' expectations.

TACO BELL UNVEILS SUBSCRIPTION SERVICE ALLOWING MEMBERS TO RECEIVE A TACO A DAY

Some QSRs are turning to new programs to keep customers signed up and engaged, including subscriptions. Fast casual giant Taco Bell recently [announced](#) it was testing a subscription service called the Taco Lover's Pass at 17 of its Arizona locations. The plan is priced at \$5 to \$10 per month and allows users to unlock hidden menu items and redeem a taco a day for a month. BTIG Restaurants analyst Peter Saleh explained that the service is expected to boost traffic, capture valuable customer data and drive purchases and loyalty. He also noted that guests who capitalize on rewards and loyalty incentives tend to visit restaurants three times as often as those who do not, and they spend 30 percent more when they do. Taco Bell's trial is ongoing, but the outcome could provide further proof that subscription services hold value in the fast casual restaurant space.



DEEP DIVE



How Restaurant Chains Are Leveraging Mobile Apps To Deliver End-To-End Customer Experiences

The pandemic shifted the adoption of digital tools for consumers and businesses into high gear, with some analysts [estimating](#) that at the onset of the pandemic, five years' worth of contactless innovation was condensed into two months to meet demand. Restaurants were in the running, updating platforms to meet evolving customer expectations and maximize profits amid unprecedented adversity.

This shift brought about a revolution in consumers' ordering and payment habits – much of it mobile. It also presented some brands with an opportunity to succeed as never before. Paytronix recently stated in its [Order & Delivery Report: 2021](#) that sales through digital ordering networks more than tripled

after the pandemic's start. Most of the transactions stemmed from consumers who had not purchased these brands previously. The survey also revealed that many brands that survived the pandemic actually benefited from the shuttering of an estimated 110,000 eating and drinking establishments nationwide. Guests who placed delivery orders spent an average of 10 percent more than customers who ordered takeout. The survey also found that brand value is more important than food quality. Customers who ranked their food with just one star were 27 percent likely to return, whereas those who rated restaurant value at a single star were just 20 percent likely to return. Loyalty programs emerged during this time as a potent way for brands to establish that value.

The **result** of this transformation: 70 percent of consumers now prefer digital ordering over in-person, with two-thirds of this group preferring to use their mobile phones. Furthermore, 62 percent of those ordering via mobile gravitate strongly toward rewards programs.

The following Deep Dive examines how restaurant chains have been leveraging mobile apps to deliver an end-to-end customer experience, from enabling guests to make reservations, order, pay and pick up to allowing interaction with loyalty programs. It also explores how restaurants are tapping into loyalty and rewards to drive mobile orders and sales.

MOBILE APP DEVELOPMENTS FOR 2020 AND BEYOND

One of the key advances **designed** to boost sales and keep consumers safe when the pandemic began was the improvement of smartphone apps to provide contactless curbside pickup. Mexican fast casual chain El Pollo Loco was among the restaurants that accelerated its release of an app

update to bring the curbside option into play within six weeks. Patrons opting into GPS tracking automatically trigger a restaurant alert when their cars approach so that staff can have their food ready in two minutes. The chain reported highly positive customer reviews and reorder rates in response to the feature.

Starbucks, a longtime leader in the mobile app space, recently **reported** that its app holds one of the top spots in in-store digital wallet payments, despite growing competition from Big Tech. The Starbucks mobile payment app, with more than 31 million users, boasts more in-person transactions than Google Pay and Samsung Pay. The only digital wallet that scores a higher rate is Apple Pay, which has nearly 44 million users and leads its mobile wallet rivals in both online and in-person transactions. Starbucks, which had the most popular payment app among U.S. consumers for years, was often hailed as a cutting-edge example of how to combine smartphone-based shopping and payments.

Starbucks also saw the value of a loyalty program as far back as 2009, when the coffee giant simultaneously **launched** its app and My Starbucks Rewards. Rewards members' pull continues to increase. The Seattle-based company reported in Q2 2021 that although in-store traffic remained lower than it was pre-pandemic, sales already had rebounded to normal levels – partly because of an 18 percent increase in the number of consumers who had enrolled in its loyalty program in the previous 12 months. Patrons are most often rewarded by ordering from a smartphone, and the pandemic led more consumers to use the device.



REWARDS PROGRAMS BOOST MOBILE

Loyalty programs have come to the **fore** in the past 18 months as a strategy for capturing sales in precarious times – and the programs have delivered on that promise. PYMNTS’ January 2021 Delivering On Restaurant Rewards report, produced in collaboration with Paytronix, found that members of loyalty programs spent more than twice as much on takeout as non-members. The August 2021 edition of the same report also **revealed** that most diners want to use restaurants’ loyalty programs the same way they usually order: via mobile. Eighty-five percent of loyalty program members said they want to use the programs through their smartphones.

Loyalty programs can offer more than immediate sales, **servicing** as a source of valuable data to increase future customer engagement. Brands concerned about losing customer relationships to third parties such as Grubhub and DoorDash have embraced loyalty programs to ensure their control of customer data. Domino’s, for example, leverages data from its 30-million-member Piece of the Pie Rewards program to improve service, increase visits and enhance results. Visit frequency, apart from sales, is a key metric because as traffic returns, order sizes likely will decline. Growth in traffic can be just as significant as sales because it serves as a proxy for customer retention or loyalty.

Loyalty programs have become crucial to restaurants’ success in the past 18 months, and they likely will continue to drive orders and sales – especially mobile – in the foreseeable future. Brands that invest in these strategies may well discover that these programs pay for themselves.



ABOUT

PYMNTS.com

PYMNTS.com is where the best minds and the best content meet on the web to learn about “What’s Next” in payments and commerce. Our interactive platform is reinventing the way companies in payments share relevant information about the initiatives that make news and shape the future of this dynamic sector. Our data and analytics team includes economists, data scientists and industry analysts who work with companies to measure and quantify the innovations at the cutting edge of this new world.

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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