# MOBILE *ORDER-AHEAD*

## Tracker

## How &pizza's mobile app delivers attitude alongside its pies

FEATURE STORY (p. 6)

Kount® PYMNTS.com

# MOBILE*ORDER-AHEAD* Tracker

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## Acknowledgment

Mobile order-ahead options are more popular than ever, with some estimates claiming they represent 60 percent of all digital food and beverage purchases. Customers use apps to buy meals more than twice as often as they did two years ago, and delivery app downloads have more than doubled in the same time span. Such rapid growth is expected to boost the market's value to $38 billion by 2020.

Quick-service restaurants (QSRs) aiming to meet this increased demand are turning to new technologies, such as ordering interfaces built into cars' touchscreens. They're also integrating with third-party providers (TPPs) like Apple Pay, Google Pay and Worldpay, and reconstructing storefronts to facilitate smoother mobile pickup without holding up lines for in-store customers.

It's not all smooth sailing in the industry, however. Fraudsters continue to steal customers' money or score free meals by lying to restaurants, with one report claiming the total number of mobile device attacks has increased 117 percent over the past year. QSRs are fighting back against bad actors by partnering with third-party payments

processors like Stripe, as well as incorporating security technologies to authenticate customers. Despite these fraud concerns, the overwhelming demand for mobile ordering solutions isn't slowing at all.

### Around the mobile order-ahead world

St. Louis-based grocery store chain Schnucks recently added a feature to its app that allows customers to place deli orders at 18 of its 119 locations. The move is part of a larger app overhaul that also includes features such as a shopping list and a wellness guide that provides nutritional information.

Restaurants that have implemented similar mobile ordering systems tend to report overwhelmingly positive results. In fact, 86 percent of mobile app operators said their offerings boosted revenues, while 93 percent believed apps improved guests' experiences and encouraged repeat purchases. Eateries that do not offer such services are aware that they are being left behind, too, with 59 percent saying they faced disruption from competitors who embraced the technology.

Fraud is also causing disruption in the mobile order-ahead space, however. A Canadian fraudster known as the Quebec Hamburglar recently stole thousands of dollars from McDonald's mobile app users, including more than $2,000 from one victim. Those hit by the scam hailed from all over the nation, but all fraudulent transactions were conducted in Montreal.

For more these and other mobile order-ahead developments, read this Tracker's News and Trends section (p. 11).

### How &pizza provides a unique mobile order-ahead experience

The mobile order-ahead market features thousands of apps, but many are made by the same small group of third-party developers. As such, QSRs in the space must work harder to distinguish themselves from their competitors. This was an especially acute problem for Washington, D.C.-based fast-casual pizzeria &pizza, whose quirky in-store vibe was not mirrored in its third-party app. In this Tracker's Feature Story (p. 6), Kevin Blesy, head of strategy for &pizza, explains how the chain developed a new app that reflects its distinctive in-store experiences while also keeping customers protected.

### Deep Dive: How QSRs are bringing AI into mobile ordering

Many QSRs are turning to artificial intelligence (AI) solutions to meet growing consumer demand for mobile ordering. While some chains are developing their own AI-integrated systems, others are working with third-party messaging providers such as Slack or Facebook Messenger to create new services. This month's Deep Dive (p. 15) explores how QSRs are implementing these technologies in their mobile ordering systems, and how such tools are changing the rapidly evolving ecosystem.

# FIVE FAST FACTS

**91.4%**
Portion of small QSR managers satisfied with mobile order-ahead pickup offerings

**16M**
Number of active Grubhub users as of March

**$38B**
Expected value of the mobile order-ahead market by 2020

**117%**
Increase in the number of mobile device attacks over the past year

**50%**
Rise in Americans' spending on meals away from home from 2007 to 2017
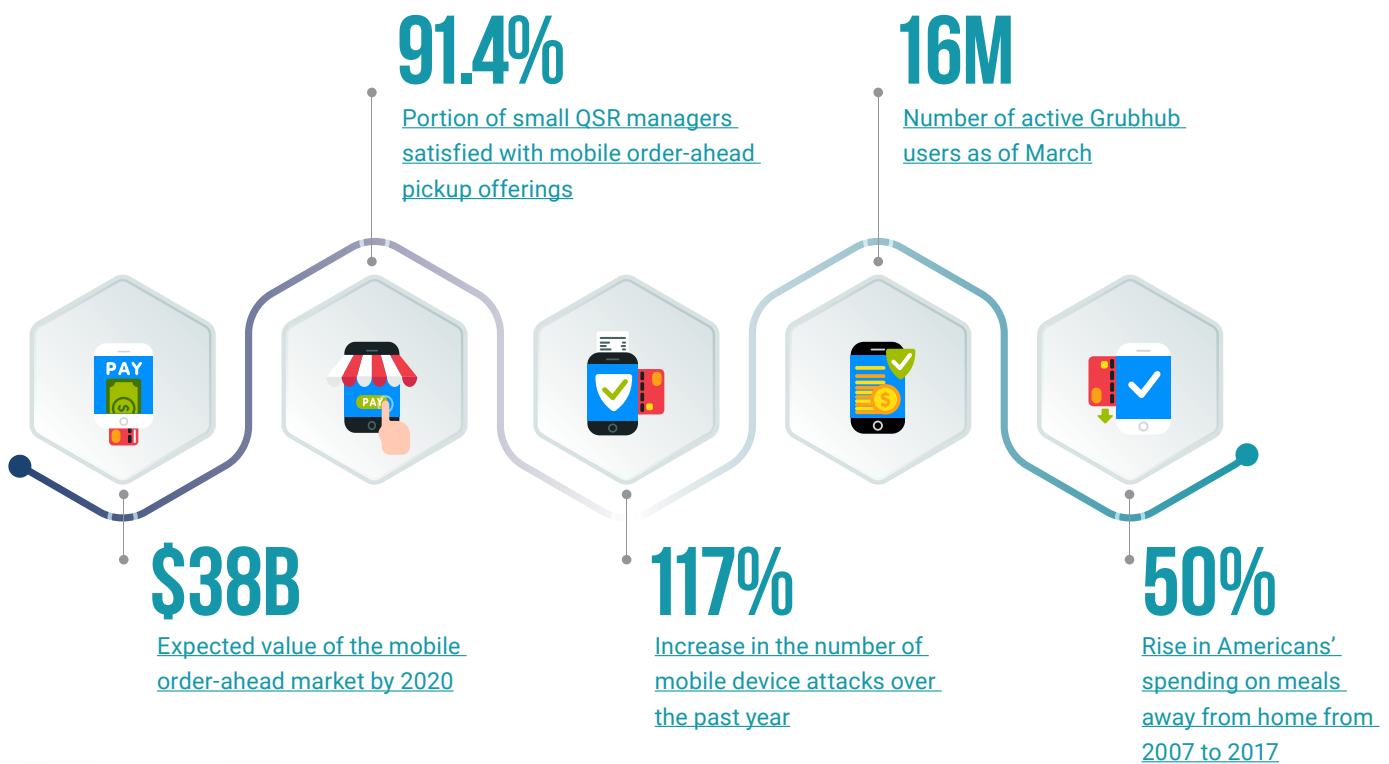
# HOW &PIZZA'S
# MOBILE APP
## DELIVERS ATTITUDE
## ALONGSIDE ITS PIES

Washington, D.C.-based fast-casual pizzeria &pizza is well-known for its quirks. Its pizzas are oblong — as opposed to traditional circles — and it gave away 30,000 free pies to furloughed government workers during the shutdown earlier this year. It also turned a Georgetown student caught on camera scarfing one of its pies during a Congressional hearing into a February 2019 marketing campaign.

&pizza wanted to convey that freewheeling attitude in its updated mobile order-ahead app, which just launched a few weeks ago. The chain's head of strategy, Kevin Blesy, recently told PYMNTS how the app was designed from the ground up to offer customers the same eccentric experiences without compromising data security.

### Developing a UI for a big pizza pie

Although &pizza provided a third-party, white-label app for several years, the key impetus for switching to an in-house offering was to recreate the in-store experience the chain had worked to cultivate.

"I don't think you want a guest to have a really unique and interesting experience in person and then feel like they're talking to some corporation on the digital ordering side," Blesy said.

The app's design reflects &pizza's dedication to the shared experience, featuring the same stark black-and-white aesthetic as its décor and pizza boxes. House special combos are called "the hits" and carry idiosyncratic names like "Gnarlic" and "Farmer's Daughter," and bringing that attitude to the app's revamped rewards system was a key priority.

"We used to just have a digital punch card," Blesy explained. "You spend X amount of dollars, and that gives you Y dollars off your next purchase. It certainly worked in that it got people excited about coming back more frequently, but we really wanted to democratize our loyalty and rewards program and open it up a bit."

&pizza switched to a points-based system to accomplish that, allowing it to gamify the rewards experience.

"There's something more interesting about that gamified solution of running up your points total as opposed to counting the dollars that you spent," Blesy said. "If you've accumulated 300 points that are good toward a free soda, you can use those points for a free soda today. Or, if you want to save those up and hoard them all for a pizza party where you're getting four or five pies, you can do that, too."

Adding enjoyment to the experience was also vital for the company.

"It also allows us to have a little bit of fun as well," he continued. "If it's a gloomy day up in Boston, [we] can drop 150 points into every guest's account in our Boston market."
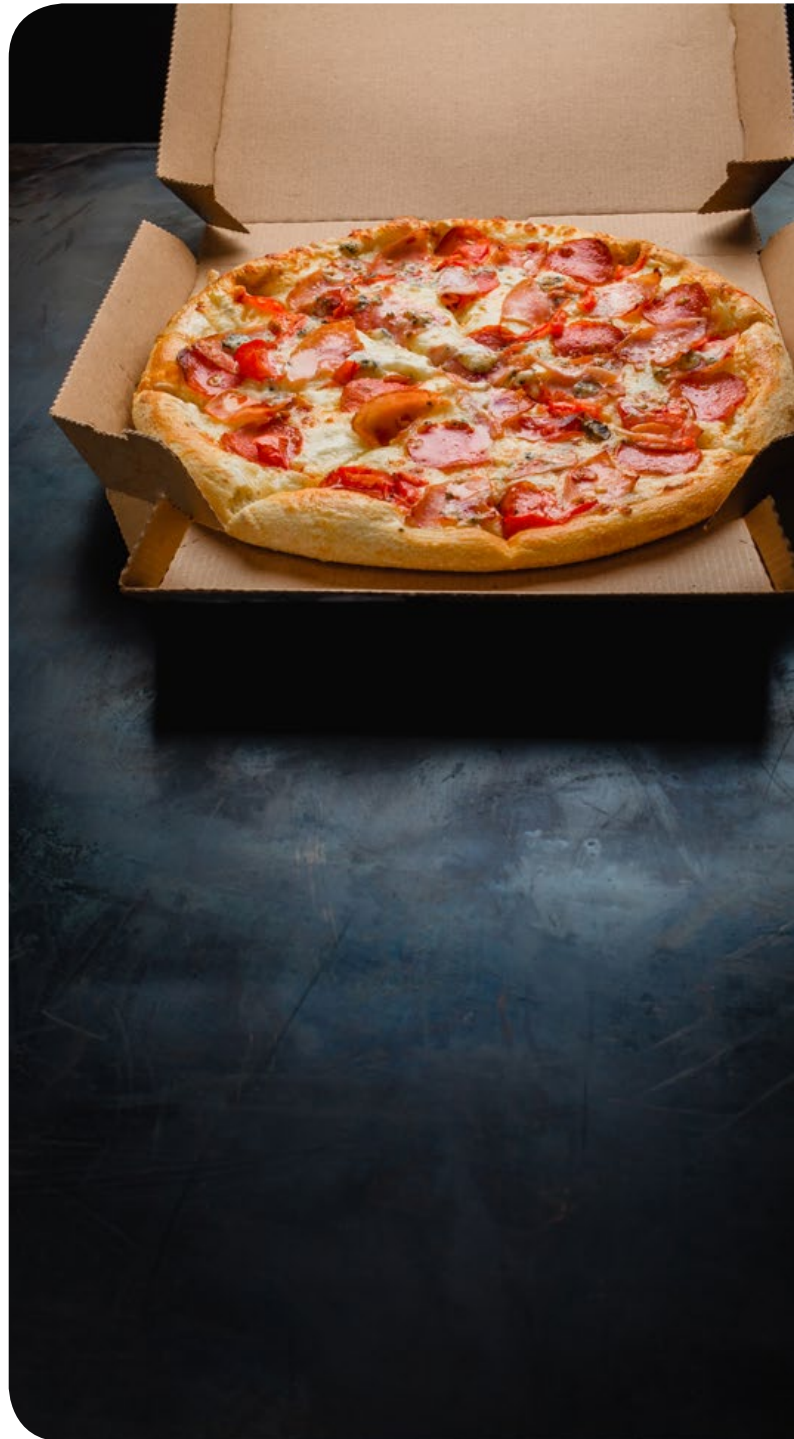
### Securing the slice

Security was also paramount in &pizza's app redesign, and the firm found that teamwork was the best defense to provide it. It utilized the same cloud-based point-of-sale system present at all of its physical locations to handle all in-app transactions, and partnered with Stripe for payment processing.

"None of the card data ever resides with &pizza," Blesy explained. "We do the right vetting up front before we put something as important as payment processing in the hands of a third-party."

Managing hackers and fraudsters is only half of the security equation, though. Bad actors can impersonate paying customers or claim fraudulent chargebacks, robbing restaurants blind. &pizza relies on exhaustive data analytics and integration to counter these attacks.

"We can see in a single pane all the order details and history associated with [a customer] and can verify whether an order was made or not," Blesy said. "When you think about restaurant technology, it's probably more disparate than technology in a lot of other industries in terms of the number of systems that don't talk to each other well. We've made a concerted effort to make that integration so that folks on our side aren't jumping between six or seven different platforms to try to understand if someone's being truthful or not."

### What's in the oven?

&pizza has sought to optimize the user experience on its app while keeping a tight lid on security, but Blesy has some concerns about the future of mobile ordering — particularly when it comes to the sheer quantity of apps on the market.

"At some point, guests aren't going to have 30 restaurant apps on their phones and use them consistently," he explained. "I think there's a need to bring digital ordering outside the bounds of mobile apps and bring it closer to how people interact digitally on a day-to-day basis."

For &pizza, the solution to that problem is an SMS-based ordering system that's currently in development and powered by an AI with smart language processing capabilities. Other restaurants will have to find their own ways to cut through the noise, though, as mobile order-ahead apps become more popular.

# MOBILE *ORDER-AHEAD* ECOSYSTEM

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
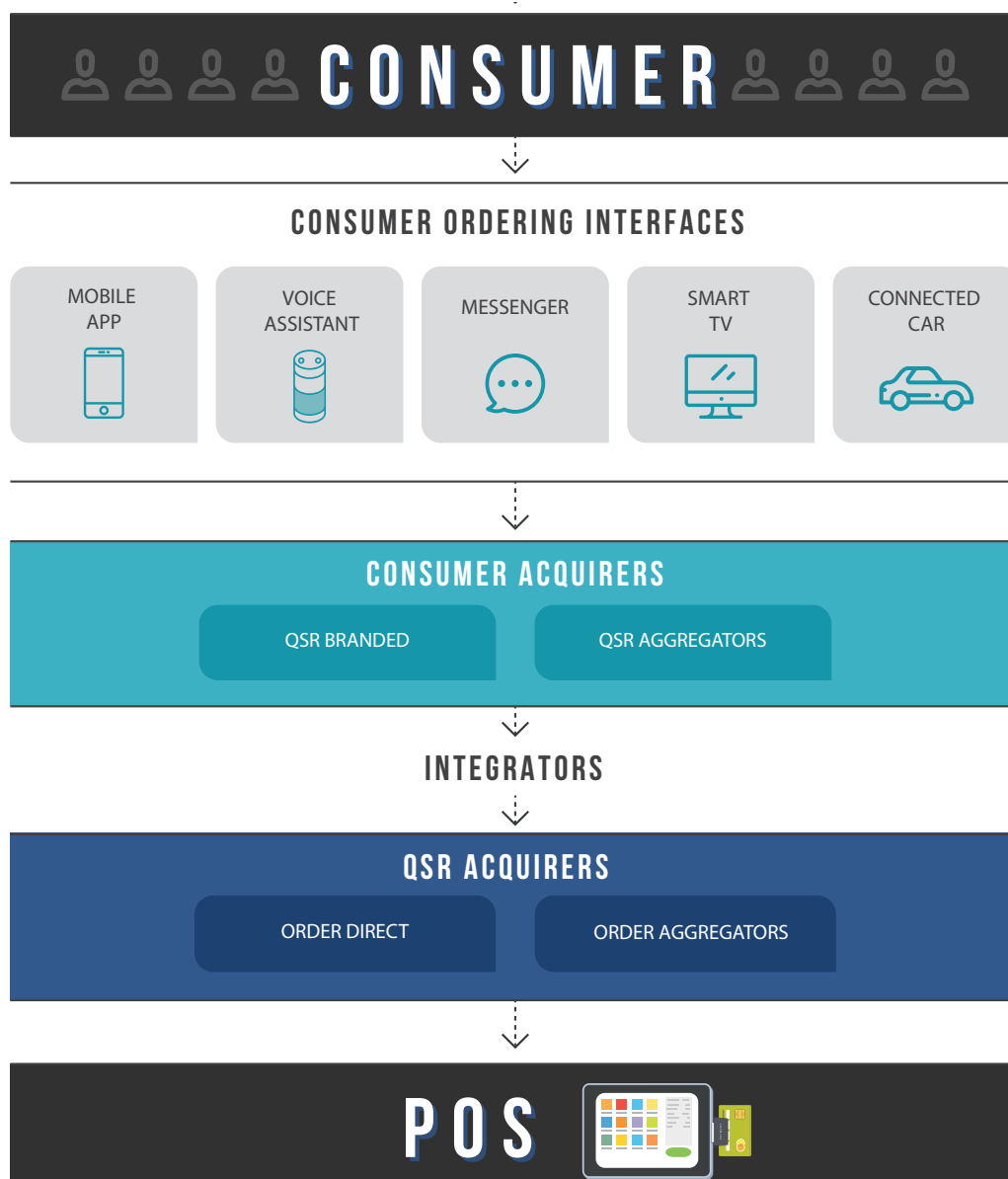
## MOBILE ORDERING SYSTEM UPGRADES

### Taco Bell tests order-ahead system on Grubhub

Taco Bell recently announced that it is testing order-ahead functionality through Grubhub just months after it began offering delivery via the platform. Greg Creed, CEO of the former's parent company, Yum Brands, made the announcement during the company's Q1 earnings call with investors, noting that that QSR has offered order-ahead capabilities on its proprietary app since September 2015.

The expansion allows Taco Bell to reach new customers and participate in Grubhub-exclusive sales and promotions. The Mexican QSR is the first of Yum Brands' three chains — which also include Pizza Hut and KFC — to partner with Grubhub. The food company reported an 8 percent increase in global sales and a 4 percent rise in in-store sales in Q1 2019.

### Schnucks adds deli order-ahead feature to mobile app

St. Louis-based grocery store chain Schnucks is also getting on board with order-ahead options. It recently added a deli order-ahead feature to its app, allowing customers to place orders at 18 of its 119 locations. Schnucks hopes to use the new capability to compete with rivals like Kroger, Albertsons and Walmart, all of which already have similar ordering systems in place.

The move is part of the chain's ongoing efforts to revamp its mobile app. It added a shopping list feature and wellness guide to the solution in March, the latter of which provides nutritional information on many Schnucks grocery items.

### Mobile order-ahead arrives at Mumbai airport

Mobile ordering is growing more popular abroad as well. Mumbai's Chhatrapati Shivaji Maharaj International Airport (BOM) this month unveiled its aptly named Order Ahead system in partnership with GrabbnGo. The solution allows

customers to place orders with multiple airport food kiosks and consolidate them into one payment. They can also have orders delivered directly to their gates or grab them at designated express pickup counters. The system is set to launch in June and will be available at several of the airport's QSRs, including Burger King, KFC, Pizza Hut and Subway.

### Dunkin' opens innovative location in Texas

Mobile order-ahead solutions are reshaping QSRs' physical storefronts, too. Coffee chain Dunkin', for example, has begun rolling out its Next Generation stores across the United States, with one recently opening in McKinney, Texas. The location offers a dedicated pickup station and digital status board that lets customers track their orders in real time. The store also includes a new cold beverage tap system and eco-friendly features designed to consume 25 percent less energy than standard Dunkin' locations.

### Apptizer kiosk integrates with Worldpay

Order-ahead tech provider Apptizer recently partnered with payments processing company Worldpay to integrate the latter's solution into its Advanced Kiosks. The kiosks automatically sync with in-kitchen displays to promote quicker order turnaround for Apptizer's clients, and public announcement systems notify customers when their meals are ready. Restaurants can also use the integration to create branded apps featuring Worldpay's payments system, allowing users to pay on the go instead of in stores. Worldpay currently processes more than 40 billion payments across 146 countries each year.

### True Food Kitchen launches loyalty program

Phoenix-based restaurant chain True Food Kitchen is working to promote mobile ordering via its recently launched True Insider loyalty program. The tiered offering is based on annual spending and is available through its digital ordering platform. The introductory Bronze level provides customers with free birthday desserts and occasional invites to events like cocktail workshops and gardening classes. The Silver and Gold tiers are made available to customers who have spent either $500 or $1,500, respectively, and offer rewards such as new menu tastings and complimentary entrees and beverages.

## MOBILE ORDER-AHEAD EXPANSIONS

### Mobile order-ahead proving popular among coffee shops

Peet's Coffee recently expanded its mobile order-ahead system, allowing customers to purchase coffee and snacks on the go. It is not the only coffee chain to jump into the ecosystem, however. More than one-third of all Starbucks transactions in 2017 were enabled through its mobile app, and regional coffee chains like Philz, Caribou Coffee and The Coffee Bean & Tea Leaf have launched their own mobile order-ahead offerings.

Third-party developers like Joe's Coffee are getting in on the action, too. Its app offers mobile order-ahead services for independent coffee shops, and it has partnered with more than 300 stores since its launch in 2014.

### Smaller QSRs see positive results with mobile order-ahead

Mobile order-ahead apps are still uncommon among smaller QSRs, but both managers and customers report satisfaction when they're implemented. PYMNTS' most recent Restaurant Readiness Index found that only 30.7 percent have mobile apps for ordering, while 31.7 percent offer such services via third-party apps. Just 21.8 percent allow payments through their apps, though, while the remainder require customers to pay in-store. Despite the relative rarity of

mobile order-ahead apps, 65 percent of QSRs believe they deliver positive user experiences. QSR customers themselves reinforce this sentiment, with 92 percent sharing the same opinion.

## Majority of restaurateurs are hesitant to embrace order-ahead

While mobile ordering options are becoming more popular, a recent Oracle survey found that a majority of restaurant operators are unprepared to embrace them. The study notes that 62 percent of respondents are doubtful of their abilities to keep up with mobile changes, and only 48 percent felt prepared to capitalize on future innovations. Restaurants are well aware of the threats mobile-equipped competitors pose, however, with 59 percent of respondents agreeing that the technology could disrupt their operations.

Respondents that do offer mobile apps, however, say they have provided overwhelmingly positive results. Eighty-six percent said the technology increased the speed of their services and improved revenues, while 93 percent believed the solutions improved guests' experiences and encouraged repeat business.

## Americans are eating out more frequently

Mobile order-ahead options have become so popular that they're even beginning to change customers' eating habits. A study from the United States Department of Agriculture (USDA) found that total spending on meals away from home in the U.S. increased by 50 percent from 2007 to 2017, while the amount spent on those at home rose by just 30 percent during the same time frame.

Such results suggest that Americans are eating out more frequently than ever, due in large part to the proliferation of mobile order-ahead apps. Customers purchased food and drinks through apps 130 percent more often in 2018 than

in 2016, and downloads of the top five food delivery apps increased by 115 percent during the same period.

## TEMPTING FRAUD TARGETS

### Mobile device attacks increase 117 percent

The proliferation of mobile devices has allowed hackers and fraudsters to target an increasing number of users. More than half of the businesses surveyed in a recent IDology study reported an increase in mobile fraud. They also noted a 117 percent jump in the number of attacks on mobile devices during the past year, including instances of caller ID spoofing, SMS interception, and SIM cloning and swapping.

The market's fluidity could be driving the increase in attacks, as more than 47 percent of U.S. mobile customers have upgraded to new phones or experienced similar changes.

Such developments can make it difficult for businesses and mobile apps to verify customers' identities, allowing fraudsters to slip through the cracks.

### Canadian McDonald's app plagued by hackers

Several McDonald's mobile app users in Canada were recently hit by attacks, resulting in thousands of dollars in fraudulent charges. The latest victim was Toronto-based tech writer Patrick O'Rourke, who was swindled out of more than $2,000 CAD ($1,500 USD) when his hacked account was used to purchase dozens of meals at locations in Montreal. Other victims also reported that fraudulent charges were made in the same city. Many of the purchases are made within moments of each other, leading experts to speculate that the attacks are the work of multiple hackers or one bad actor sharing stolen data.

## HOW AI MAKES MOBILE ORDER-AHEAD SMARTER

Customers are increasingly placing orders through mobile and digital channels, prompting QSRs to seek out new tools that can improve their technological capabilities. Many restaurants are bolstering their operations through AI solutions, which can be integrated into mobile ordering systems in many ways.

Domino's is arguably the leader in the digital food ordering space, with former CEO Patrick Doyle famously claiming that it was a tech company that happened to sell pizzas. The chain was one of the first to feature online tracking and allow orders to be placed from Apple Watches. It has recently made headlines by delivering pizzas via flying drones and miniature six-wheeled vehicles.

Domino's also offers an AI-enabled chatbot to assist with customers' mobile ordering processes. The chatbot, Dom, is available via web browser, Facebook Messenger and SMS. It can also be linked to users' Google accounts, allowing it to access a list of their favorite orders across different devices. Domino's added voice recognition technology to the service last year, and customers can now use it to place orders as they would with live operators. The chain sees voice solutions as the way of the future for mobile ordering capabilities.

"Over the next three to five years … I think you will see more and more people using natural voice to place orders as opposed to thumbing things into their screens," Doyle said in an interview with *TheStreet*.

Domino's is using AI in even more unconventional ways, too. It launched a 12-week promotion after Super Bowl LIII that allowed customers to send in photos of pizza in exchange for

points in its Piece of the Pie rewards program. The Domino's tech team powered the offering by creating an AI system to determine whether the photos actually contained images of pizza, though the algorithm was given loose parameters.

"We kept the definition broad," Kate Trumbull, Domino's vice president of advertising, said in an interview with *AdAge*. "We landed on any open-faced expression of sauce, cheese and crust."

Taco Bell is also getting into the AI-enabled ordering game by testing several methods, including its TacoBot chatbot. Though it is still in beta testing, the Slack-based solution enables customers to order food for pickup at any location.

Text-based, third-party ordering chatbots are becoming increasingly popular across the entire QSR industry. Subway launched its own such chatbot for Facebook Messenger earlier this year, integrating with Mastercard's Masterpass to allow users to pay without leaving the site. Such orders can be placed at 26,500 of the QSR's 42,000 locations.

Solutions such as these can offer massive outreach opportunities for QSRs, as more than two-thirds of American adults use Facebook, according to Pew Research. What's more, three-fourths of the social media giant's users check the site at least once a day.

Third-party developers are creating AI-powered mobile ordering solutions, too. One player in the space is Bensen AI, which developed a voice-activated program for Google Assistant and Amazon Alexa that allows users to ask their voice assistants to place orders with participating restaurants. The system can also recall consumers' favorite dishes and store credit card information. Such orders also count toward any applicable rewards or loyalty programs.

Even as AI-enabled offerings become more common across the mobile order-ahead space, they are still only the beginning for QSRs. As solutions become more sophisticated, they open up almost endless possibilities for automation.

## 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

### 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

### 02

### LOYALTY INTEGRATIONS

How customers can access their loyalty or rewards program accounts via a business' mobile app

### 03

### 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

## Third-Party Aggregator Apps:

EAT24 · Pay · GRUBHUB · LevelUp · Tapingo · SmoothPay · foodler

## SDKs Enabling Branded Order-Ahead Apps:

CARDFREE · LevelUp · SmoothPay

## Middleware Examples (Connecting Ordering Channels to POS):

avanti COMMERCE · ChowNow · Clorder · olo · splick.it · tilster · zuppler

## Demand Side: QSR Branded Order-Ahead Apps

Applebee's · argo tea · BJ's RESTAURANT BREWHOUSE · BLAZE PIZZA FAST-FIRE'D · BURGER KING · california PIZZA KITCHEN · Capriotti's SANDWICH SHOP · CAVA

Chick-fil-A · Chili's · CHIPOTLE MEXICAN GRILL · CHOPT Creative Salad Company · Costa Vida · Denny's · Domino's

DUNKIN' DONUTS · El Pollo Loco · FIREHOUSE SUBS · FIVE GUYS · FREEBIRDS · Hungry Howie's FLAVORED CRUST PIZZA · Jamba Juice · Jersey Mike's SUBS · JIMMY JOHN'S SANDWICHES

la Madeleine COUNTRY FRENCH CAFÉ · Le Pain QUOTIDIEN · McALISTER'S DELI · McDonald's · MOE'S southwest grill · MOOYAH BURGERS · FRIES · SHAKES · Panera BREAD

PEI WEI · PIZZA PAPA JOHNS · Pizza Hut · PizzaRev CRAFT YOUR OWN · Portillo's BEEF · BURGERS · SALADS · POTBELLY SANDWICH SHOP · QDOBA MEXICAN EATS · QT QuikTrip

Quiznos · SHAKE SHACK · SHEETZ FRESH FOOD MADE TO ORDER · DONATOS PIZZA SUBS SALADS · SONIC · Specialty's · STARBUCKS COFFEE · SUBWAY

sweetgreen · TACO BELL · TEXAS ROADHOUSE · TGI FRIDAYS · tropical SMOOTHIE CAFE · veggiegrill · noon mediterranean · Wawa

snap kitchen · WHICH WICH SUPERIOR SANDWICHES · White Castle · WING STOP · ZOËS KITCHEN

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.

## STARBUCKS

Starbucks remains in the top mobile order-ahead slot, with the international coffee chain's mobile app and features retaining their popularity.

## DOMINO'S PIZZA

After a short score dip last month, Domino's has reclaimed its second-place position, boosting its score from last month's low of 83 to a solid 94.

## CHICK-FIL-A

Down a bit from its second-place spot last month, Chick-fil-A is still the third-most popular QSR on the list, though a little further away from Starbucks with its current score of 90.

| Rank | Provider | Score |
|------|----------|-------|
| 1 | Starbucks | 96 |
| 2 | Domino's | 94 |
| 3 | Chick-fil-A | 90 |
| 4 | Pizza Hut | 88 |
| 5 | Wingstop | 84 |
| 6 | Burger King | 81 |
| 7 | McDonald's | 79 |
| 8 | Taco Bell | 78 |
| 9 | Wawa | 72 |
| 10 | BJ's Restaurant Brewhouse | 72 |

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 0 | 25 | 32 |
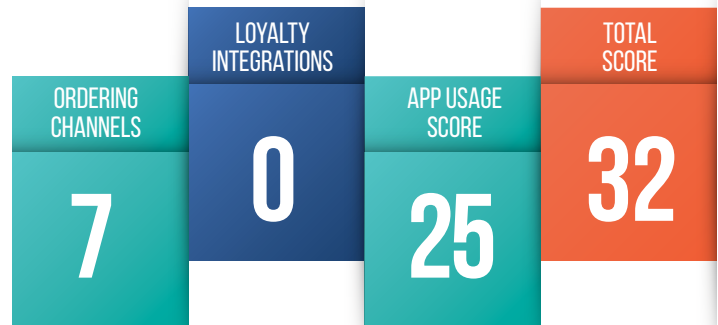
## APPLEBEE'S

**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.

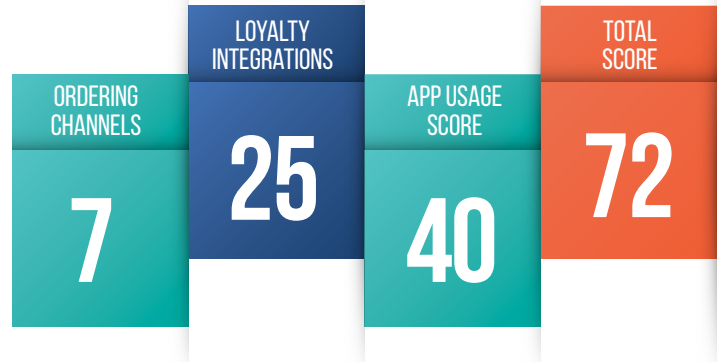| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 7 | 39 |
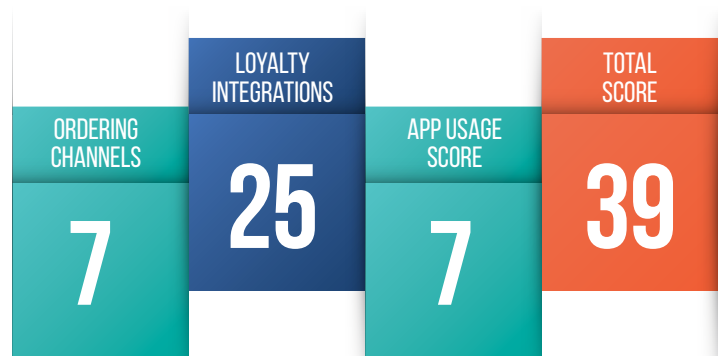
## ARGO TEA

**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 | 40 | 72 |

## 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 | 34 | 66 |

## 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 |
|---|---|---|---|
| 15 | 25 | 41 | 81 |

## 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.

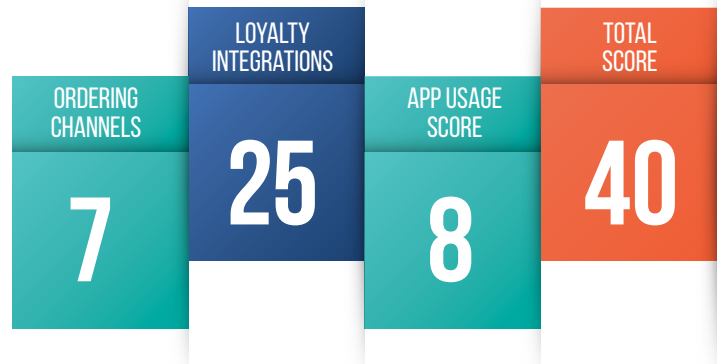| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 22 | 54 |

## 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 | 8 | 40 |

## 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 | 27 | 59 |

## CAVA GRILL

**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.

## CHICK-FIL-A

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

**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.

## CHILI'S

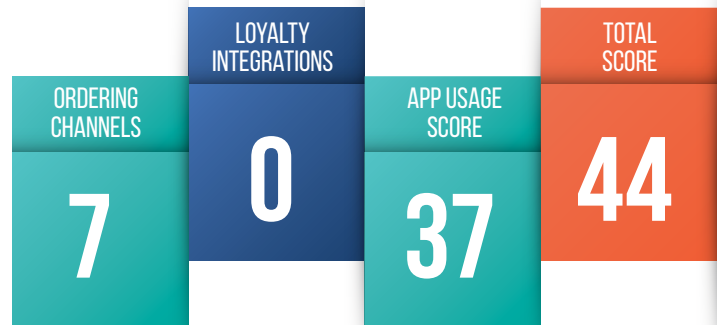| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 39 | 71 |

**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 |
|---|---|---|---|
| 7 | 0 | 37 | 44 |

## 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 | 12 | 37 |

## 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.
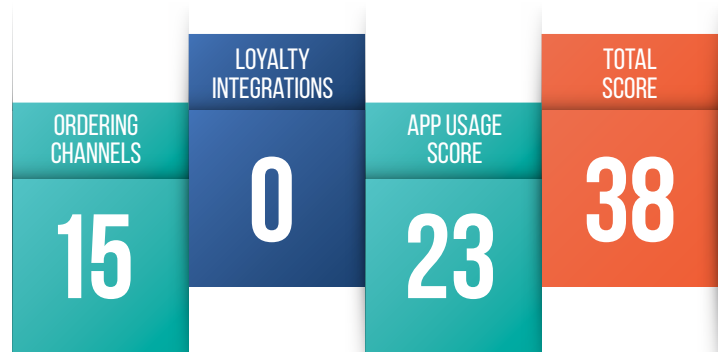
**COSTA VIDA**

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 0 | 25 | 19 | 44 |

**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.

**DENNY'S**

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 15 | 0 | 23 | 38 |

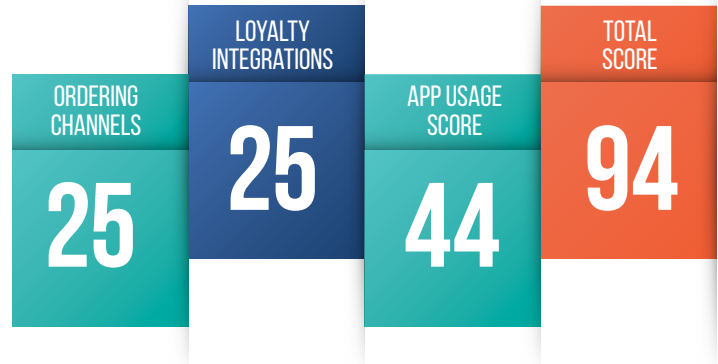**Launch of mobile order service date:** *May 2017*

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 | 44 | 94 |

**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 smartwatch. iPhone users can also access a voice-ordering assistant.

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 0 | 26 | 33 |
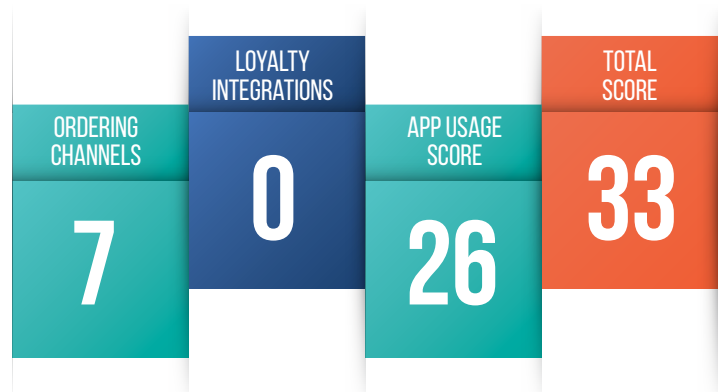
**DONATOS PIZZA**

**Launch of mobile order service date:** *January 2017*

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

*Companies are organized in alphabetical order.*

**DUNKIN'**

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

## DUNKIN' DONUTS

**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.

**EL POLLO LOCO**

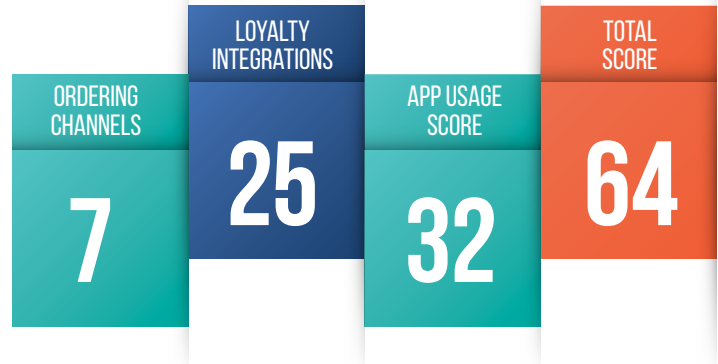| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 20 | 52 |

## 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.

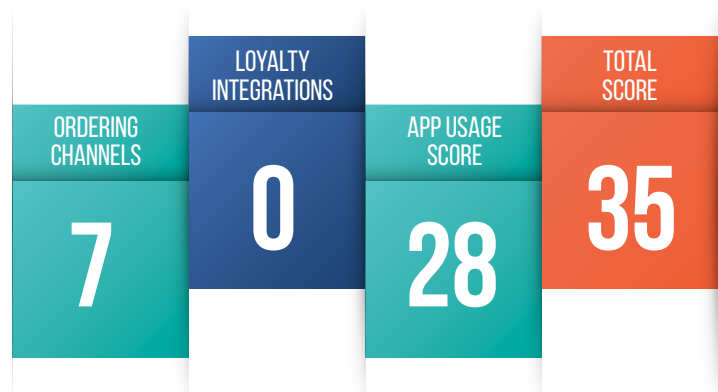| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 32 | 64 |

## 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 |
|---|---|---|---|
| 7 | 0 | 28 | 35 |

## 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.
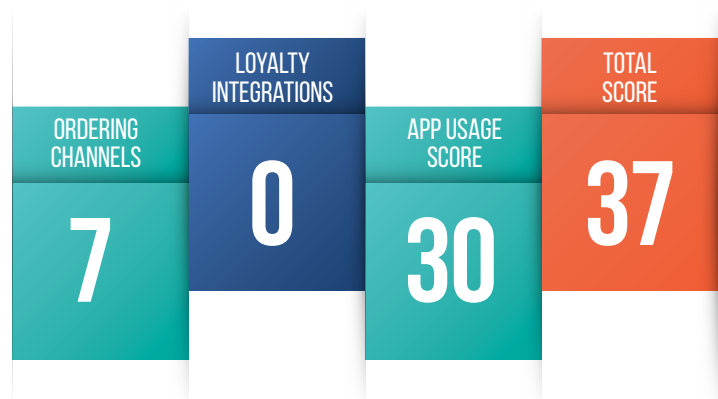
## FREEBIRDS

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|:---:|:---:|:---:|:---:|
| 7 | 25 | 13 | 45 |

**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 PIZZA

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|:---:|:---:|:---:|:---:|
| 7 | 0 | 30 | 37 |

**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 | 23 | 55 |

## 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.

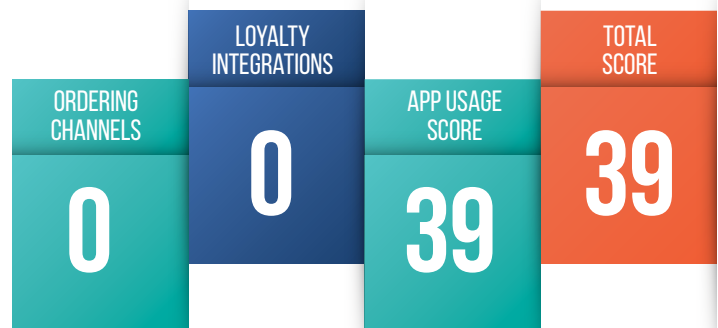| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 29 | 61 |

## 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 | 39 | 39 |

## 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 | 23 | 55 |

## 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.
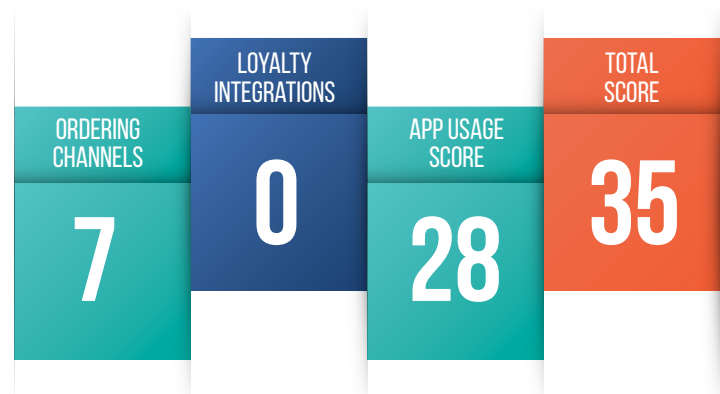
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 0 | 25 | 13 | 38 |

## 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 | 0 | 28 | 35 |

## 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 |
|---|---|---|---|
| 7 | 25 | 47 | 79 |

## 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 | 32 | 64 |

## 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.
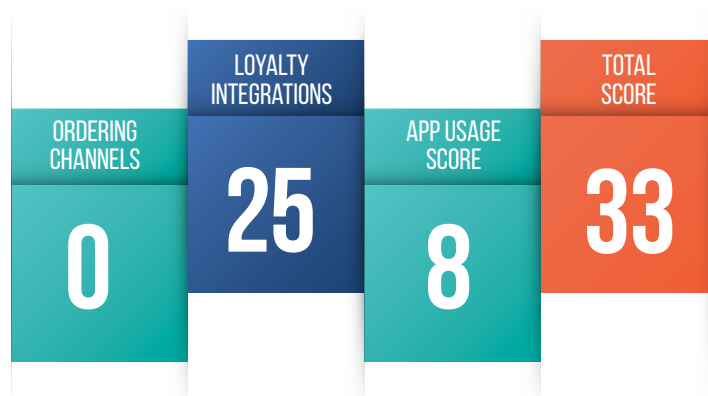
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
| --- | --- | --- | --- |
| 7 | 25 | 5 | 37 |

## 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 |
| --- | --- | --- | --- |
| 0 | 25 | 8 | 33 |

## NOON MEDITERRANEAN

**Launch of mobile order service date:** *November 2016*

The Noon Rewards app allows guests to order items and pay for them in advance. They can also earn reward points, including $9 for every $99 spent, and receive exclusive discounts.
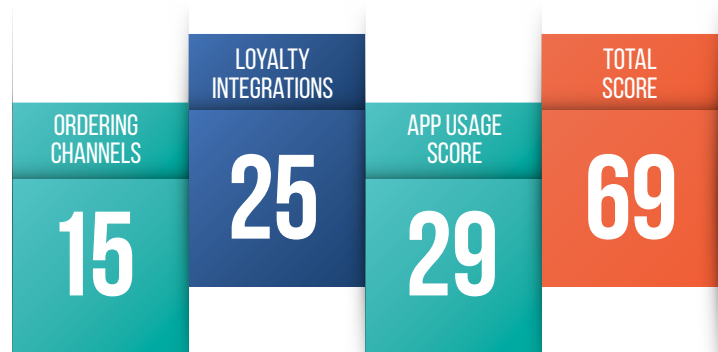
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 38 | 70 |

## 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 |
|---|---|---|---|
| 15 | 25 | 29 | 69 |

## 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 | 23 | 55 |

## 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 | 38 | 88 |

## 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.
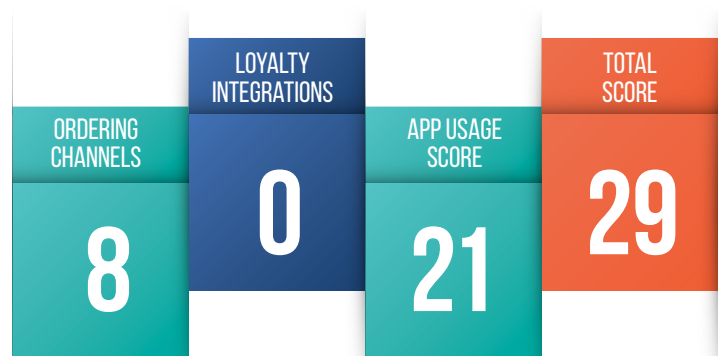
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 8 | 25 | 23 | 56 |

## 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 |
|---|---|---|---|
| 8 | 0 | 21 | 29 |

## 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.
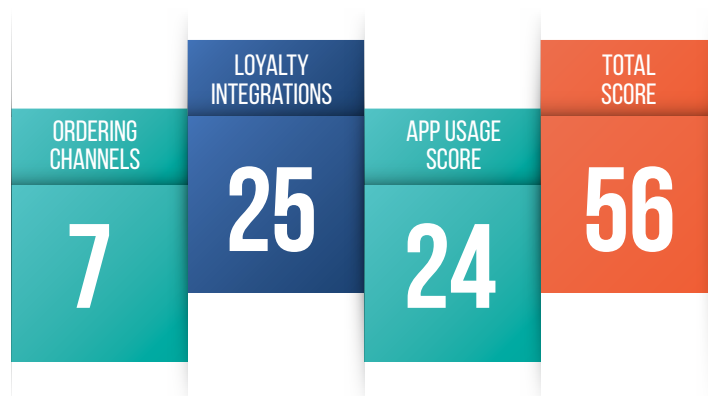
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 19 | 51 |

## 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 | 24 | 56 |

## 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 | 33 | 58 |

## 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.
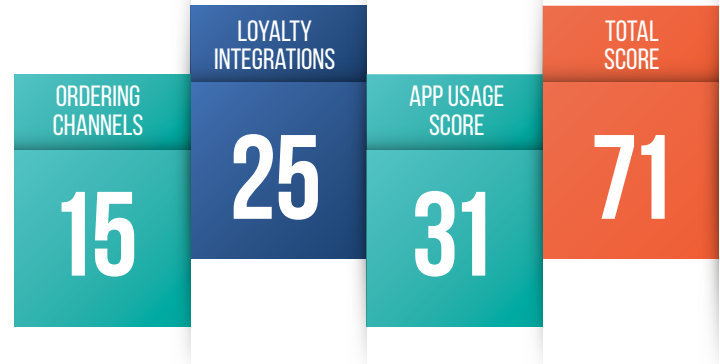
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 24 | 56 |

## 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 | 31 | 71 |

## 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 | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 0 | 25 | 35 | 60 |

## 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.
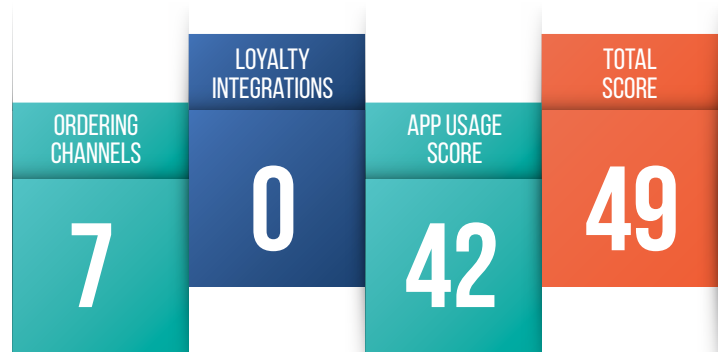
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 19 | 51 |

## 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 |
|---|---|---|---|
| 7 | 0 | 42 | 49 |

## 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.

## Specialty's

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 0 | 25 | 13 | 38 |

### 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 | 46 | 96 |

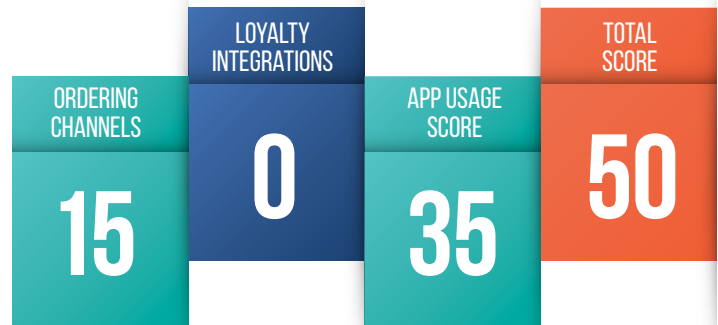**Top Mobile Order-Ahead Provider**

### 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.

**SUBWAY**

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 15 | 0 | 35 | 50 |

**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.

**SWEETGREEN**

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 29 | 61 |

**Launch of mobile order service date:** *February 2013*

The sweetgreen app allows users to order from a full menu and access a rewards program.
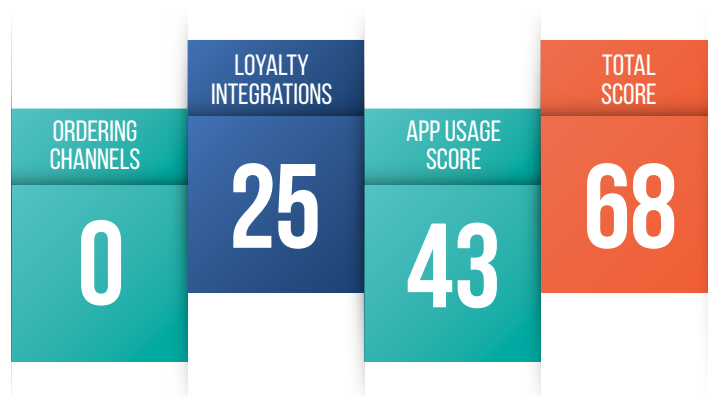
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 17 | 25 | 36 | 78 |

## 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.
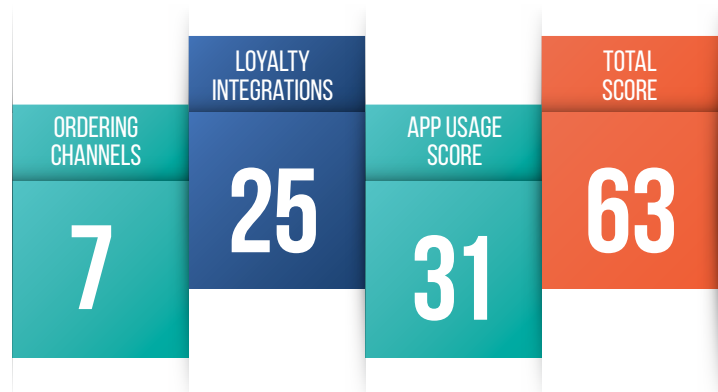
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 8 | 25 | 29 | 62 |

## 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.

| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 31 | 63 |

## 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.

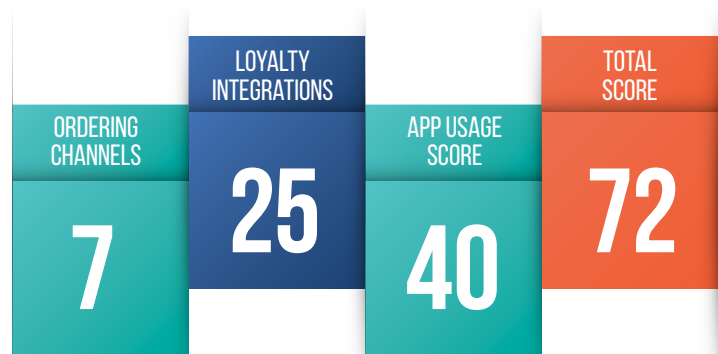| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 0 | 25 | 25 | 50 |

**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.
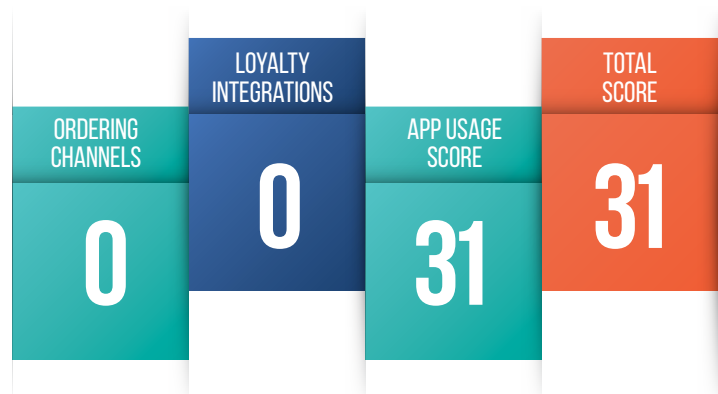
| ORDERING CHANNELS | LOYALTY INTEGRATIONS | APP USAGE SCORE | TOTAL SCORE |
|---|---|---|---|
| 7 | 25 | 32 | 64 |

## 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 | 31 | 31 |

## 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 | 34 | 84 |

## 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 | 23 | 55 |
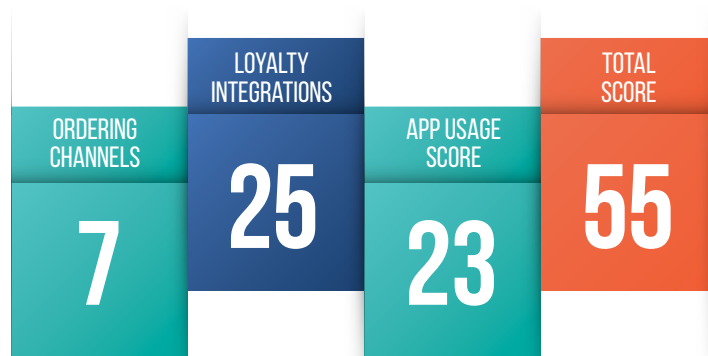
## ZOËS KITCHEN

**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.

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