

ORDER TO EAT TRACKER®

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MOOYAH on weathering the pandemic with curbside pickup, bulk food sales

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Burger King unveils new contactless restaurant concept

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How restaurants are meeting customers' demands in the COVID-19 era



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Acknowledgment

The Order To Eat Tracker® is done in collaboration with Paytronix, and PYMNTS is grateful for the company's support and insight. PYMNTS.com retains full editorial control over the following findings, methodology and data analysis.

WHAT'S INSIDE



The COVID-19 pandemic has been devastating to the restaurant industry, with stay-at-home guidelines and social distancing orders forcing many eateries to temporarily shut their doors. Restaurant traffic **plummeted** nearly 70 percent in March, forcing eateries to rely heavily on delivery services until dining rooms and patios gradually began reopening in recent months. Experts have said that outdoor dining is likely the safest way to eat at restaurants while minimizing the risk of infection, but these on-premises dining opportunities could end when colder weather shuts down outside seating areas.

This means restaurants will soon have to pull out every stop again to draw customers. Many will continue leveraging the third-party delivery apps that sustained them until their on-premises operations restarted, but these apps come with a host of issues. Some restaurants **allege** that the apps' commission fees — which can be as high as 40 percent — are eating into their margins, but cash-strapped eateries may hesitate to abandon the apps for fear of losing the customers that use them. Some municipalities are taking steps

to reduce such problems, however: San Francisco is **imposing** a commission cap of 15 percent, while New York is examining a 10 percent cap.

Some restaurants are encouraging customers to conveniently pick up food by using first-party ordering options, which ultimately give restaurants a greater share of profits. Drive-thrus have proven to be exceptionally popular, with visits to them **increasing** by 26 percent in Q2 2020 and accounting for 42 percent of all restaurant trips during this period. Restaurants like Chipotle and Shake Shack are fast-tracking new, drive-thru-focused concept restaurants to meet this demand, eschewing dining rooms entirely in favor of to-go orders.

Other chains, especially those that do not have drive-thru lanes, are utilizing curbside pickup instead. Customers can order food online and inform restaurants of the makes and models of their cars, enabling staff to place the orders directly in their trunks to minimize human contact. Dining rooms may be beginning to reopen, but restaurants are not out of the woods yet. Countless chains and independent eateries' survival may depend on innovations such as these.

ORDER TO EAT DEVELOPMENTS AROUND THE WORLD

The delivery sector is experiencing more business than ever during the pandemic, but its growth began long before the current health crisis occurred. A recent [study](#) found that the industry grew by 20 percent over the past five years and projected online food delivery revenue to hit \$24 billion by 2023. This growth is due in large part to the surging popularity of third-party apps that have expanded delivery offerings, with the top five apps in the United States being DoorDash, Grubhub, Postmates, Uber Eats and Slice.

Restaurants are also expanding their in-house ordering functionalities as dining rooms gradually reopen at partial capacity. Burger King recently [unveiled](#) plans for a new store concept that features touchless ordering as its centerpiece, for example, with the restaurant consisting of pickup windows, park-and-order lanes

and drive-thrus. Customers receive their food via conveyor belts to limit contact with restaurant staff.

Third-party ordering services are similarly increasing their functionalities. Uber Eats, for example, recently [introduced](#) a contactless system for placing takeout or dine-in orders, with customers using their phone cameras to scan QR codes to access restaurant menus. This allows restaurants to shift away from physical menus, a potentially dangerous spread vector for COVID-19. The contactless pickup ordering feature is offered nationwide, but the dine-in solution is currently available only in select U.S. cities, including Boston, Chicago, New York and Washington, D.C.

For more on these stories and other order to eat developments, read the Tracker's News and Trends section (p. 12).



HOW RESTAURANTS CAN SURVIVE THE PANDEMIC WITH CURBSIDE PICKUP AND BULK GROCERIES

Restaurants have faced unprecedented challenges as the pandemic affects everyday life. Customers have dramatically altered their relationships with quick-service restaurants (QSRs) in light of social distancing, stay-at-home orders and the ever-present risk of infection. Restaurants therefore have had to act fast to stay in business, with some deploying never-before-seen strategies to drive revenue. In this month's Feature Story (p. 8), PYMNTS talked to Natalie Anderson Liu, vice president of brand for burger chain MOOYAH, on how the QSR deployed curbside pickup and bulk grocery orders to meet customers' needs and break even at a time when turning a profit is harder than ever.

DEEP DIVE: HOW RESTAURANTS ARE MEETING CUSTOMERS' DEMANDS AND DRIVING REVENUE

The pandemic might be a game-changer for how restaurants operate, but customers' expectations began shifting long before COVID-19 appeared. Consumers are becoming more and more accustomed to drive-thrus and mobile ordering, and they expect to acquire food safely and securely. This month's Deep Dive (p. 17) explores how restaurants such as Chipotle and Shake Shack are innovating to satisfy customers' evolving demands.

EXECUTIVE INSIGHT

Ordering via drive-thru is more popular than ever, with visits increasing by 26 percent during Q2 2020, but many QSRs do not have the physical means to offer drive-thru services. What other options can they leverage to cater to this demand?

"Today it seems that all the pieces of a restaurant have been taken apart and reassembled in new and exciting ways. It used to be that QSRs had very distinct attributes, including a kitchen, dining room, drive-thru and parking lot. But now the dining rooms are closed, and parking lots have become something else entirely. For many of our customers, curbside pickup has augmented or even replaced the traditional drive-thru. Instead of ordering from a drive-thru kiosk, guests order ahead and just pick up on-site. We've even seen some QSRs adjusting their drive-thrus so that if they have multiple lanes, one [of them] handles only those guests ordering ahead. And we're even seeing customers that had no ability to install a drive-thru, like those in shopping centers or malls, offer a drive-thru experience right at the curb. The key for all of this to work is an engaging mobile experience that plugs directly into the loyalty program and into the POS system, with an ability for the guest to select how they want to receive their order. The mobile app opens a line of communication that is necessary to ensure a great guest experience."

ANDREW ROBBINS
CEO at [Paytronix](#)

166%

Increase in on-premises dining over the past two months as social distancing orders loosened

20%

Growth of the delivery industry over the past five years

70%

Share of customers who have used smartphones to interact with restaurants

26%

Increase in drive-thru visits during Q2 2020

62%


Share of customers who worry about fraud when interacting with QSRs

FIVE FAST FACTS

ECOSYSTEM



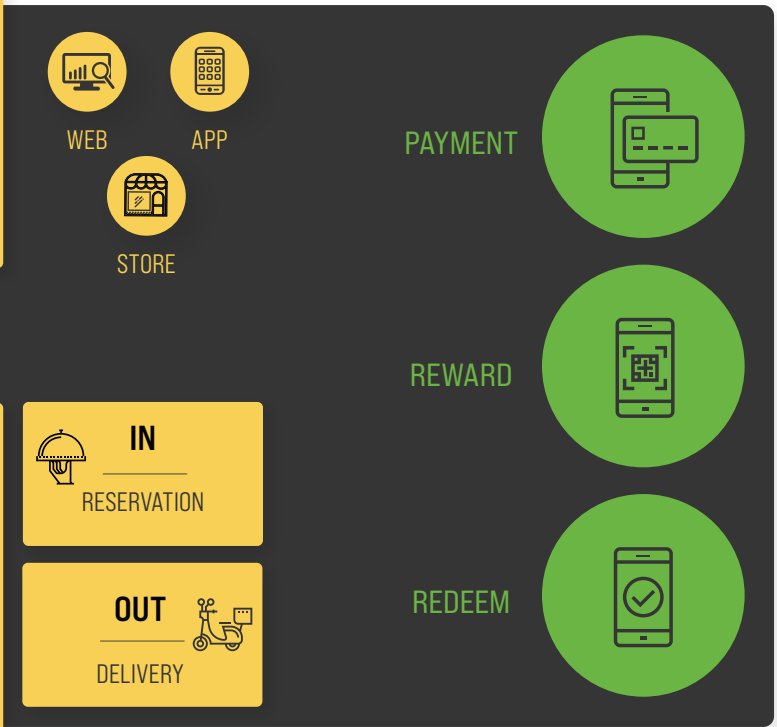
ACQUIRE CUSTOMERS



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

**MOOYAH On
Weathering The
Pandemic With
Curbside Pickup, Bulk
Food Sales**

The COVID-19 pandemic has been one of the biggest game-changers in the restaurant industry's history, with government-ordered stay-at-home and social distancing mandates shutting down millions of dining rooms across the country in March and April. Eateries were forced to rely entirely on takeout and delivery services to survive – many for the first time – and countless restaurants closed for good before on-premises dining slowly became possible. Those that weathered the past few months still took huge losses, with total industry revenues in August ending \$11 billion lower than those in January and February.

MOOYAH, a Texas-based hamburger chain with more than 100 locations in North America and the Middle East, took a severe financial hit from the pandemic.



The chain saw its sales decline by 40 percent in March and April, said Natalie Anderson Liu, MOOYAH's vice president of brand. Drastic changes were needed to adjust to the new normal, and that meant pulling out all the stops to attract customers.

"Every day, you'd wake up and it was just a battle mode," she said. "[We asked,] 'What do we have to do not only to survive, but thrive, and get as many restaurants on the other side of the pandemic as possible?'"

MOOYAH has deployed numerous innovations to improve customer satisfaction and drive revenue since the pandemic's onset. Curbside pickup was one of the most notable new services, as it was with many other QSRs, but the chain also began offering bulk food sales to provide customers with what they needed to ride out the crisis.

CURBSIDE PICKUP

One of consumers' most pressing demands was being able to order and pick up food with minimal interaction between customers and staff, as person-to-person contact carries the risk of viral transmission. Customers who desire this functionality are likely to abandon restaurants that cannot offer it for those that can, cutting off a potentially lucrative revenue stream. MOOYAH did not have this capability in place before the health crisis hit, but Liu said the chain responded quickly.

"Curbside was not something that we had before the pandemic, but it was a program that we got off the ground very quickly and integrated with our app," she explained. "Both mobile and desktop [users] can click on 'curbside,' and then it asks them the make and model of their vehicles so that our team members can more easily connect them with their orders."

Integrations like these are not without their difficulties, however. Various obstacles – ranging from staff capacity to the physical layout of restaurant locations and parking lots – can get in the way of providing seamless curbside pickup.



“For example, team members are incredibly busy, and sometimes the phone doesn’t get answered right off the bat,” Liu explained. “Or guests think they should just be able to pull up and somebody is looking out the window and just waiting with their food in their hand, but that’s not the case. It’s also really that you have dedicated curbside parking spaces, so that team members can more easily look out the window and see that the vehicle has pulled up. But the line of sight to the parking lot [sometimes means] we cannot guarantee that.”

Restaurants are tackling these challenges as they arise, balancing troubleshooting with implementing additional features that customers demand. Some of these demands were prevalent even before the pandemic hit, but one development was unique.

BULK FOOD ITEMS

A run on the country’s grocery stores occurred in March and April as lockdown orders began. Consumers emptied supermarkets’ shelves of staples and essentials like pasta, rice and toilet paper, and even items that were not picked clean became rarer and more expensive as supply struggled to match demand. Restaurants’ revenues slowed to a trickle as states ordered eateries to shut down their dining rooms, emboldening many chains to satisfy this demand and shore up their profits in one fell swoop.

“Like many brands did, we [introduced] bulk items for sale,” Liu noted. “We actually sold bulk certified Angus beef for our consumers, as well as a meal kit. All of this was because initially it was very hard for consumers to get products in retail grocery stores, so we responded very quickly with that.”

Offering groceries like this was common early on during the pandemic, with independent eateries and chains like Panera offering flour, alcohol or fruits and vegetables along with normal menu entries. Grocery stores' supply chains eventually recovered, leading some restaurants to cease offering bulk items, though they learned valuable lessons.

"As the demand at retail settled and the supply has rebounded, we removed those products," Liu said. "But we kept housemade cookies and potato chips, two products that before the pandemic were just available on our catering menu. We kept them because

they carry and deliver a little bit better than our other menu items."

These shifts appear to have paid off for MOOYAH, with Liu saying that its year-end revenue is expected to be one percentage point in the positive. This result would be lackluster in normal times but is exceptional amid this year's chaos. Pandemic-driven challenges are far from over, but restaurants across the nation are experimenting with innovations and features to drive customer demand no matter what happens next.



NEWS & TRENDS



Restaurant trends

CUSTOMERS BEGIN TO EMBRACE ON-PREMISES DINING, BUT DELIVERY REMAINS POPULAR

Social distancing and stay-at-home orders have heavily affected restaurant dining, which was largely banned in the U.S. in March because of fears that diners could spread or contract COVID-19. Many states have loosened these restrictions in recent months, however, allowing patrons to eat outdoors or in socially distanced dining rooms. On-premises dining has skyrocketed as a result, with a recent [survey](#) finding that such activity has jumped by 166 percent over the past two months. Consumers' plans to dine out have also risen by 292 percent.

The reported spike in on-site dining began in June and was caused by multiple factors. States began to open their economies, for example, and improving weather conditions made consumers more willing to eat outside. Experts have said that outdoor dining is significantly safer than eating in enclosed areas.

DELIVERY SECTOR HAS INCREASED BY 20 PERCENT OVER THE PAST FIVE YEARS, STUDY FINDS

Delivery remains highly popular as the pandemic prompts many diners to stay home, but its recent surge is part of a larger trend. The delivery industry has expanded by 20 percent over the past half decade, according to a recent [study](#), with online food delivery revenue expected to hit \$24 billion by 2023. Delivery accounted for just \$18 billion last year.

This growth is being driven in part by major third-party platforms, the top five most prevalent in the U.S. being DoorDash, Grubhub, Postmates, Uber Eats and the pizza-focused Slice. There are 446,680 restaurants around the nation using at least one of the top 16 food delivery apps, including 270,730 establishments with fewer than four locations.

SALES DECLINES SHRINK FOR LARGE RESTAURANT CHAINS

On-premises dining's return has been positive for restaurants' revenues, although the industry still faces overall sales declines. A recent [study](#) found

that such declines at restaurant chains are now in the single-digit percentages following double-digit losses during the past 21 weeks. Sales declines of 9 percent occurred in the week ending Aug. 16, for example, a significant improvement from the 44 percent sales dip during the week of April 12, when social distancing protocols were at their peak.

The news is good for restaurants, but experts say they are not out of the woods yet. Outdoor dining's return during the summer contributed significantly to the reduced sales decline, but outside options could soon close as colder weather approaches. Some experts predict that more restaurants will face bankruptcy without additional relief from the federal government.

ENGAGEMENT STRATEGIES FOR KIDS COULD BOOST FAMILIES' INTEREST IN OFF-PREMISES DINING OPTIONS

Kids' menus, play areas and meal prizes are mainstays for many restaurant chains that cater to families, as parents are more willing to eat at restaurants where their children will be entertained rather than bored and apt to cause a ruckus. Many of these options disappeared when restaurants shuttered indoor dining, but some parents are looking to have such experiences with off-premises dining. A recent [study](#) of 500 parents revealed that 90 percent were interested in receiving kids' activities, such as toys or games, with their to-go orders.

Sixty percent of respondents said their children would be more excited to receive food from restaurants that included prizes with their to-go meals. Families are ordering food to go more often anyway, with 77 percent of parents saying they will place more takeout and delivery orders in the next three months than they did during the same period last year.

New restaurant ordering technology

UBER EATS ADDS CONTACTLESS ORDERING TO ITS DINE-IN AND TAKEOUT SERVICES

More consumers than ever are turning to digital ordering options during the COVID-19 pandemic, and these systems' developers are regularly unveiling features to please their customers and restaurant partners. Uber Eats, for example, recently [introduced](#) a contactless ordering system for customers dining in or ordering takeout. Consumers can use their smartphones to scan QR codes at participating restaurants to view their meal items, allowing them to place orders without handling physical menus. The contactless pickup ordering feature is offered nationwide, though the dine-in solution is currently available only in select U.S. cities, including Boston, Chicago, New York and Washington, D.C.



SILVERWARE POS LAUNCHES IN-RESTAURANT CONTACTLESS ORDERING SYSTEM

Restaurants are going to great lengths to keep customers safe in their recently opened dining rooms, using disposable menus and taking other precautions, but some are leaning into wholly digital options instead. Developer SilverWare POS recently **launched** a new contactless ordering, tipping and payment platform for in-restaurant diners that allows guests to scan QR codes at their tables to access the restaurant's menu and pay for their meals afterward. SilverWare purports that this system will increase check averages and reduce time spent at tables, boosting customer turnover as well as revenue. Many restaurants are currently operating at half capacity, said SilverWare executive vice president Lucky Thalass, meaning any increase in revenue will make a huge difference.

Restaurants add ordering features

PANERA ADDS ORDERING FEATURE THROUGH GOOGLE PLATFORMS

Restaurants are integrating numerous ordering options to give customers easier access to their menus. Fast casual bakery chain Panera, for example, recently **introduced** ordering options through Google Search, Google Maps and Google Assistant. Customers can place delivery or contactless curbside pickup orders through these services and use Google Pay to make their payments. The restaurant joins several of its competitors in ordering through Google, which in turn partners with third-party services such as Postmates and DoorDash to deliver the orders.

Several independent restaurants have **voiced** objections to Google-enabled ordering, however, saying that it funnels money into big third-party delivery services rather than generating appreciable revenue for the eateries themselves. They say that the delivery services get the commissions, not the restaurants, but the latter must shoulder the burden of making the food and is forced to take responsibility if the delivery service is subpar.

MASTERCARD ENHANCING DUNKIN' AND WHITE CASTLE DRIVE-THRU EXPERIENCES

Drive-thrus have become essential to QSR chain experiences during the health crisis, as they allow ordering and pickup with minimal contact between restaurant staff and customers. QSRs are **partnering** with various third parties to ensure their drive-thrus are state-of-the-art, with Dunkin' and White Castle



recently partnering with Mastercard to integrate artificial intelligence (AI) into their systems, for example.

Dunkin' is testing Mastercard's Shop Anywhere platform at one location to enable 24/7 customer access without requiring staff: An AI brain takes and distributes orders. White Castle is meanwhile adding AI-powered vehicle recognition and voice ordering to several test locations. The system will present personalized menus to frequent customers based on their past ordering trends, and it can also adjust its menu based on frequently ordered items at each specific location.

TACO BELL LAUNCHES DRIVE-THRU-FOCUSED RESTAURANT CONCEPT

Mexican fast food chain Taco Bell is **revamping** its drive-thru services with the launch of a new concept restaurant focusing on mobile orders and drive-thru. The experimental location will be less than half the size of a typical Taco Bell and will feature two drive-thru lanes: one for on-premises orders and one dedicated solely to mobile order pickup. The location will also include curbside pickup options staffed by concierges, and Taco Bell's app will tell customers the quickest route to the location.

Two such locations are scheduled to open in Q1 2021. Taco Bell has served 4.8 million more cars via drive-thru in 2020 than it did by this time last year. The chain is also paring back its menu to prioritize its highest-selling items.



SHAKE SHACK EXPANDS ITS CURBSIDE PICKUP OFFERINGS

Curbside pickup has been another popular ordering option during the pandemic, with customers placing orders online, sharing descriptions of their vehicles and having restaurant staff deposit their orders in their cars with minimal contact. Hamburger QSR chain Shake Shack began offering curbside services at 10 of its locations in July but has now **extended** the offering to 40 percent of its U.S. locations. The chain plans to continue expanding its ordering and pickup options, with CEO Randy Garutti saying that half of the units it aims to open next year will have drive-thrus or walk-up windows.

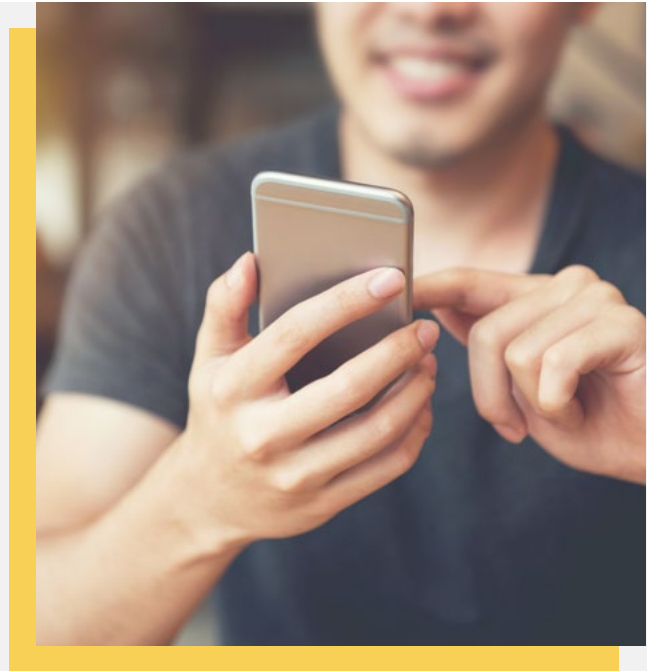
Shake Shack said that 22 percent of all orders were for curbside pickup when the program began but that up to 40 percent of orders are now placed through the service. The chain also eventually plans to offer delivery through its app.

BURGER KING UNVEILS TOUCHLESS ORDERING SYSTEM

Some consumers are concerned about contracting COVID-19 when interacting with shared surfaces, as the virus can potentially survive for several days on contaminated touch points such as a PIN pads, digital menus or cash. Many restaurants are thus exploring new contactless systems to reduce this spread. This includes Burger King, which recently **unveiled** plans for a new restaurant concept that features touchless ordering as its centerpiece. The concept will consist of pickup windows, park-and-order lanes and drive-thrus, with customers placing orders via their chosen methods and restaurant staff members offering them their items via conveyor belt to reduce contact. The stores are planned to open in Miami and Latin America next year.



DEEP DIVE



Restaurant Ordering Innovations Attracting Customers In The COVID-19 Era

The ongoing pandemic has hit few industries as hard as it has the restaurant industry, with stay-at-home guidelines and social distancing forcing many eateries to shut their doors either permanently or at least until the pandemic ends. Restaurants' profits **declined** by double digits between April and August, although such declines have slowed in recent weeks. Many eateries were initially limited to making profits solely through takeout and delivery services, though some have recently begun offering outdoor and socially distanced indoor dining options. These developments could be stopped short by colder weather or surges in COVID-19 cases, however.

Successful restaurants have always listened to their customers' needs, but eateries must now cater to their exact demands if they wish to stay in business. The risk of contracting COVID-19 has made consumers more cautious about dining out, meaning that restaurants need to double down on safety and emphasize

the benefits of on-premises dining to assuage consumers' fears.

Mobile ordering services, advanced drive-thrus and customer safety and security are the top customer priorities for restaurants in the COVID-19 era. The following Deep Dive explores how restaurants are using the latest dining and ordering technology to satisfy these requirements.

MOBILE ORDERING

The pandemic has made mobile food ordering apps more popular than ever, but their use has been on the rise for almost a decade. A December 2019 study **found** that 70 percent of restaurant customers had used mobile devices to interact with restaurants, for example, though the nature of these interactions varied. The most popular method of engagement was to look up coupons and deals, cited by 42 percent of consumers. Thirty-eight percent used their phones to look up menu items ahead of time, and 37 percent searched

for the nearest location of a given chain. Digital food ordering has **expanded** 300 percent faster than dine-in traffic since 2014, and it continues to grow.

Restaurants are also rapidly launching and updating mobile apps to meet this rising demand. Sixty percent of those that have offered mobile ordering capabilities **report** generating incremental sales, with pizza chains in particular **saying** that the average mobile order is 18 percent larger than the equivalent placed by phone. Even restaurants without their own in-house apps – such as many independent eateries – report that partnering with third-party services like Grubhub or Uber Eats has **raised** their sales volumes by up to 20 percent.

DRIVE-THRU

Drive-thrus have also been key revenue streams for restaurants during the pandemic, as they enable limited contact between restaurant staff and customers and thus reduce the risk of COVID-19 infection.

Research reveals that drive-thru visits **increased** 26 percent in Q2 2020 and that such visits accounted for 42 percent of all restaurant visits during this time. This builds on a trend that has been brewing for the past few years, the study found, as 39 percent of QSR customers reported that they used drive-thrus more in 2019 than in 2018.

Some QSR chains are taking note of this increased traffic and rolling out new drive-thru capabilities or adding lanes to existing restaurants. Shake Shack, which currently has no drive-thru locations, recently announced that it would be **developing** a new “Shack Track” restaurant concept that includes drive-thrus and walk-up windows. Chipotle is meanwhile **fast-tracking** its new “Chipotlane” concept, which entails customers ordering on their phones and picking up their meals at drive-thru lanes. The chain now has Chipotlane restaurants in 32 states, each of which has up to 10 percent higher sales than traditional Chipotle locations.



SAFETY AND SECURITY

Customers' top priority regarding restaurants is their own safety, however. A recent [survey](#) found that 62 percent of customers worry about fraud – such as pilfered payment details, account takeovers or fake reviews being left in their names – when interacting with QSRs. One-third of these customers said they would never patronize a specific QSR again if they experienced fraud using its app, revealing the importance of offering secure ordering experiences.

One of the most promising tools QSRs leverage to fight fraud is AI, which studies have found can [increase](#) fraud detection rates by 50 percent and reduce false positives by 60 percent. Chipotle, for example, has witnessed success with its AI-based fraud detection system, which leverages a data analytics-based approach backed by human analysts to verify its findings.

“When you’re looking at account takeovers, for example, it’s predominantly automated bot attacks that have an identifiable signature,” Curt Garner, Chipotle’s chief technical officer, [said](#) in an interview with PYMNTS. “As a retailer, you can say there’s no practical [reason] why a customer would be trying to log on to your network using a bot. The security platforms that utilize AI and machine learning can also spot attack patterns as they try to morph into different vectors and very quickly block those transactions as well.”

Restaurants may be rolling out numerous innovations to keep their patrons engaged, but these efforts will be in vain if customers do not trust their favorite eateries' data security. Securing payment data and other aspects of the customer experience is the keystone to driving demand during the pandemic and beyond.



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. Once implemented, these can be used to help establishments elevate their brand profiles. Its offerings can also be used to generate data insights to help restaurants pinpoint opportunities to improve their operations and customer engagements. The company’s platform can integrate with many widely used restaurant POS systems. For more information, visit <https://www.paytronix.com>.

We are interested in your feedback on this report. If you have questions, comments or would like to subscribe to this report, please email us at OrderToEatTracker@pymnts.com.

A background image of a dining table with wine, bread, and appetizers. The table is set with several glasses of red wine, a loaf of bread, and a plate of appetizers. The scene is captured from a high angle, showing the hands of diners and the details of the food and drink.

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