MAY 2018

MOBILE *ORDER-AHEAD*
Tracker™

How **Chipotle** Manages Soaring
Mobile Order Demand

MOBILE *ORDER-AHEAD*
Tracker™

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t's one thing to know what customers want, but knowing how to give it to them is a whole other ball game.

Restaurants are increasingly offering mobile ordering capabilities to give customers the convenient dining experiences they crave. There isn't a clear path to mobile ordering success, however, and many are finding themselves forced to revise their initial approaches.

It's an important service to get right, though. Mobile ordering has demonstrated a clear hold on customer habits, with a February 2018 survey finding that 39 percent of quick-service restaurant (QSR) customers had ordered a meal via a smartphone app within the past 90 days. That's a sizeable increase over 2015 data, which found only 11 percent had done so.

But streamlining mobile ordering services has sent some restaurants back to the drawing board.

For example, QSR McDonald's is rethinking its mobile ordering offering in the wake of low mobile app adoption. CEO Steve Easterbrook has reportedly decided to focus his company's efforts on improving user experience, boosting tech reliability and revamping employee training — then making a bigger advertising push to boost usage.

Meanwhile, mobile loyalty and online ordering app provider Paytronix is promoting new features to help brands update their mobile apps. That includes integrating online ordering platforms directly into a brand's mobile app, and an option that makes it easier for them to change their apps' appearances.

Not every company is far enough along in its mobile order-ahead lifespan to have reached the revision stage, though. Some in the space are just getting started with their first tries at mobile ordering, and other competitors are focused on attracting more attention and engagement through their existing services.

Around the mobile order-ahead world

One fashionably late arrival to the mobile order-ahead world is The Coffee Bean & Tea Leaf, which just recently launched the service at 191 stores. Currently limited to Arizona and Southern California locations, the company plans to expand its mobile ordering option to more locations later this year. Its app also features an integration with Uber.

On the flip side, early adopters like movie ticketing platform Atom Tickets have been offering mobile food ordering for years. The company is now hoping to boost engagement with the help of a new feature, one designed to increase the number of customers who preorder concessions. The feature sends customers a reminder on the day of the movie, prompting them to order concessions ahead. Atom Tickets claims that one-third of its customers currently use the service to preorder concessions when purchasing tickets online.

Dunkin' Donuts has also indicated a focus on getting more customers into mobile ordering. The coffee giant said it received a positive response to the quality of its ordering services, and that 80 percent of customers who place an order with its app end up using it again. Dunkin' now aims to expand that base of mobile order-happy users by enrolling more members into its loyalty program, through which the ordering service is offered. It added 500,000 additional loyalty members in Q1 2018.

Chipotle's multipronged approach to mobile order fulfillment

While some restaurants are working to draw more attention to their mobile ordering abilities, the service has almost been too popular for Chipotle Mexican Grill. Mobile orders increased 41 percent over last year, prompting the company to redesign its in-store food preparation processes to get orders filled fast.

In this month's feature story (p. 6), Curt Garner, Chipotle's chief digital and information officer, explains how the burrito QSR has enhanced and refined its mobile order approach over the past decade — and cut its average fulfillment time from 45 minutes to approximately 12.

12%
Percentage of Q2 FY 2018 transactions made through mobile order at U.S. Starbucks venues

41%
Increase in Chipotle's mobile ordering between Q1 2017 and Q1 2018

8.5MILLION
Number of Dunkin' Donuts loyalty program members as of Q1 2018

39%
Share of U.S. QSR customers who ordered meals via a smartphone app within the past 90 days, according to a February 2018 survey

20,000
Number of McDonald's restaurants offering mobile ordering services

FIVE FAST FACTS

How Chipotle Manages Soaring Mobile Order Demand

> **"** *An excellent customer experience means delicious food that is made on time and accurately.* **"**
>
> CURT GARNER
> **chief digital and information officer at Chipotle**

Even a great product can quickly turn customers off if the purchasing experience is frustrating and filled with friction. Burrito lovers might move on to the next lunch spot if the promised convenient ordering process turns out to involve a long wait, ends with them walking off with someone else's order or sees them biting into a carnitas burrito that lacks the guacamole they paid extra to enjoy.

Those are the types of concerns [Chipotle Mexican Grill](#) has been working to tackle since it debuted its mobile ordering service in 2008. For the burrito and bowl QSR chain, speed and reliability are as important as flavor and ingredient accuracy.

"An excellent customer experience means delicious food that is made on time — and accurately," said Curt Garner, Chipotle's

chief digital and information officer, in a recent conversation with PYMNTS.

In earlier days, a customer had to wait approximately 45 minutes for his order to be ready for pick up. That timeline is now closer to 12 minutes, and that's with mobile orders increasing 41 percent between Q1 2017 and Q1 2018 to reach 8.8 percent of all sales. So, what does it take to trim away a whole half hour of prep time? According to Garner, a data-based workflow design, automation and other digital supports and app features are good places to start.

The second make line

When a customer walks into a Chipotle venue, one of the first things she sees is a row of ingredient bins with staff members

ready to scoop up the desired fixings. What she doesn't see is a second, digitally enhanced version of this assembly line in the back, where staff whip up the orders that come from outside the store.

> *[For] many restaurants, when they take out-of-store orders, it interrupts the flow for the customers that are in the restaurant and the teams that are serving the guests.*

Creating this second, dedicated preparation line was a key step for Chipotle.

"[For] many restaurants, when they take out-of-store orders, it interrupts the flow for the customers that are in the restaurant and the teams that are serving the guests," Garner said. "We've built a dedicated make line, called the second make line, that only exists to serve those orders that come from out-of-store."

Chipotle has more recently been rolling out digital support to help the second make line staff work more efficiently. It did away with printing customers' orders on paper receipts, a system which could easily get confused. Those orders are instead listed on LCD screens positioned over the make line, and the display shows images of each ingredient needed to more quickly and clearly convey the information. The ingredient bins also light up and are color-coded for quick recognition. A label is then automatically printed to be placed on the order or its pick-up bag, replacing a process that once required staff to handwrite a description.

Controlled pick-up times

Even with all these digital aids, there's still a limit to how many orders humans can fulfill at a time. To address this, Chipotle

UNDER THE HOOD

Why hasn't Chipotle had a long-term loyalty program?

"The plan we've been building is very much a digital flywheel [of what and how] we sell. We needed to have world-class digital capabilities — from a responsive online site to mobile apps that are great — [and] we needed to solve for how we would be able to accept payment for out-of-store orders and not require payment within the restaurant. [In addition], foundational technologies had to be put into place around customer ID and management.

These are a whole bunch of foundational things that we knew we needed to do before we could launch something like a loyalty program. Now the question is, is this the right time? What would that program look like? Are there any other gaps that would need to be filled for us to have a great program?"

-CURT GARNER, CHIEF DIGITAL AND INFORMATION OFFICER FOR CHIPOTLE

conducted time and motion studies to determine fulfillment capacity expectations for its kitchens. The QSR settled on offering customers pick-up time slots spaced 15 minutes apart. A customer can either choose a desired time slot ahead of time — placing an order for lunchtime during his morning commute, for example — or opt for the next available opening in approximately 15 minutes.

"We can't overload the restaurant with mobile orders," Garner noted. "Part of the reason the promised fulfillment time was longer in the past was because the teams had to hedge a lot. There was no metering, and they could become overwhelmed at lunch and need extra time to catch up... [Under this system], waves of customers come in every 15 minutes and our teams can then focus on creating the meals in those times [when] it's not a pick-up time [slot]."

The ability to choose a pick-up time has become popular, and the app is specifically designed with built-in buffer so that a customer who selects a noon pick up won't lose it while placing the rest of his order, he added.

Fixing up more features

Other app features have also helped the QSR to digitize more of its processes. In its early days, corporate offices that wanted to order food for a lunch meeting often sent in group orders by fax. Chipotle has been able to reduce the use of fax by making other channels more appealing, which required adding a digital group ordering feature that enables friends to join an order by cell phone number or email. A feature to allow for bill splitting has yet to be added.

Looking ahead, the QSR is toying with more ideas to enhance its offerings, like creating a loyalty program — something it has never offered for longer than a few months — or even adding drive-throughs. Regardless of what it ultimately unveils, focus remains on leveraging digital tools to quickly get burritos into hungry hands.

After all, the QSR has learned that the recipe for offering compelling meals to in-store and out-of-store customers alike relies not only in tasty food and front-of-store preparations, but also in cooking up the right fix for back-office operations.

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
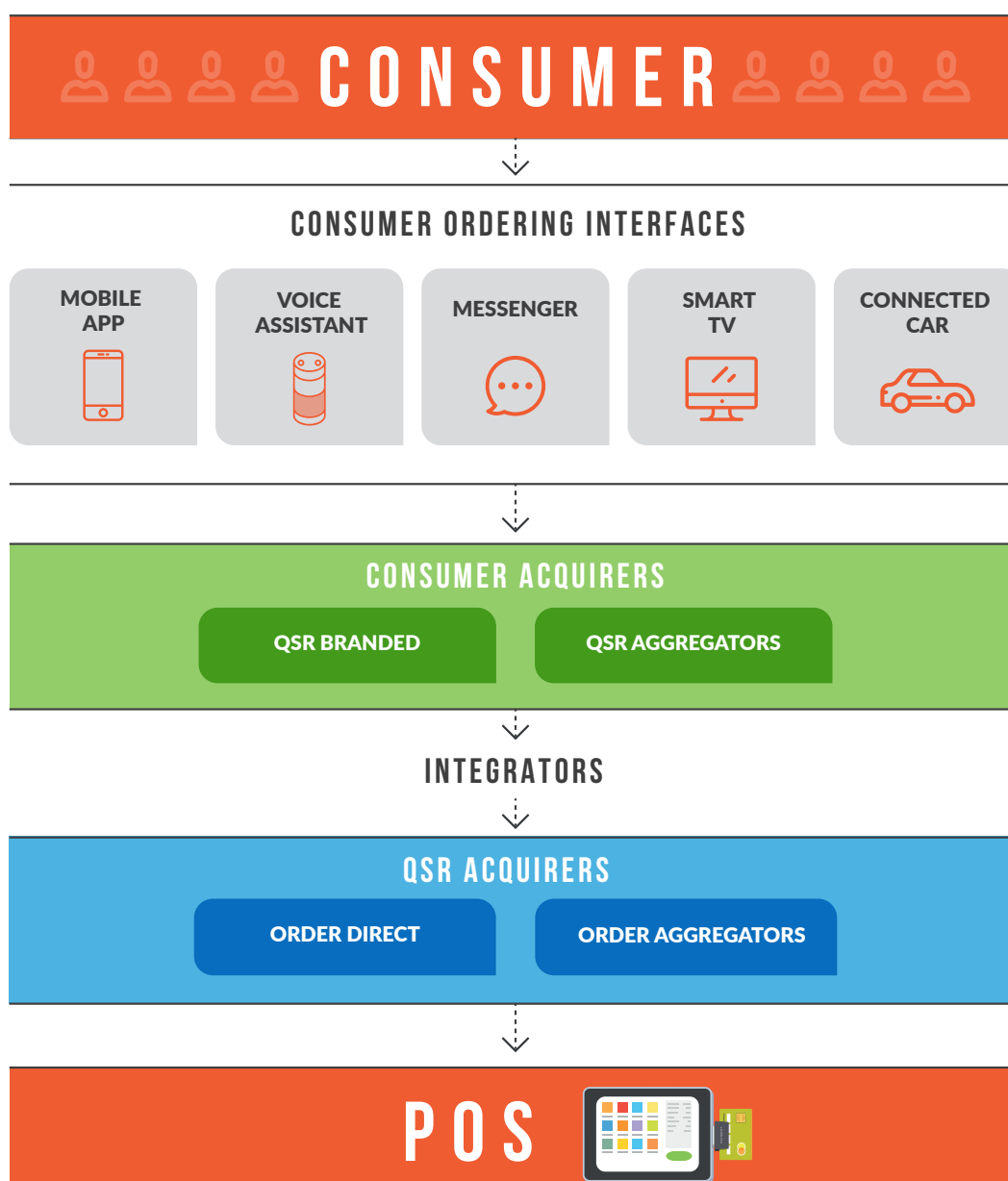
Pancakes and pizza pies

IHOP enables orders through voice, car and app

Mobile order-ahead has gone international, and breakfast chain giant IHOP is aiming to bolster its offerings through a pair of new partnerships. One collaboration, with Google, enables customers to place orders via the Google Assistant or Google Home. Another, with tech company IBM and automotive manufacturer General Motors, looks to put IHOP mobile on the road, enabling the addition of one-touch ordering and payments in 2017 and 2018 GM automobiles. These initiatives come not long after IHOP's 2017 roll out of its mobile ordering app, which allows customers to place and pay ahead for orders and search for store locations.

In a recent conversation with PYMNTS, IHOP's executive director and head of IT, Michael Chachula, noted that customers tend to purchase more when doing so through mobile ordering. He attributed this to purchasing food for both now and later in one go. They might only order what they're sure they want when dining in, Chachula said, and they also have the option to contact a waiter for extra items. In addition, mobile order-ahead customers often ask if anyone around them wants to add to their orders.

Little Caesars launches pick-up kiosks

Elsewhere in the industry, pizza maker Little Caesars has announced a new pick-up service for its 55 Utah-based locations. The Pizza Portal is a self-serve pick-up kiosk complete with heating abilities to keep pizzas warm. Customers who order and pay via the company's mobile app can collect their meals from the appropriate compartment in the kiosk when they arrive at the store, and scan a QR code or enter a PIN to gain access. The Pizza Portal is available through a partnership with restaurant management company Sizzling Platter, and is the first heated, self-service, mobile order pick-up station in the QSR industry, according to a press release.

Coffee break

Dunkin' to promote mobile app

Dunkin' Donuts is planning to promote its mobile ordering with a new advertising push. On a recent conference call with analysts, company executives noted that the ordering service is available as part of its DD Perks loyalty program, which boasted a membership growth of 33 percent last year to hit 8 million members. The program added an additional 500,000 members in Q1 2018, raising the total to 8.5 million. Data surrounding Dunkin's mobile ordering experience also seems encouraging, as a recent survey found 80 percent of

customers who placed an order with the app used the service again.

Starbucks' Q2 mobile orders see slight rise

Dunkin' isn't alone in its mobile ordering ambitions, and competing coffee giant Starbucks is also looking to boost its offerings. The company plans to achieve this by opening its mobile order capabilities to any customer, not just rewards members, sometime this year.

Even without doing so, though, Starbucks' mobile ordering and reward memberships are both increasing. The company claimed in its Q2 FY 2018 report that mobile order-ahead was responsible for 12 percent of transactions in its U.S. stores, up

from last year's 11 percent. Reward program membership also increased by 11 percent in that timeframe, adding 1.6 million active U.S. members, and reward spending now comprises 39 percent of U.S. company-operated sales, Starbucks said.

The Coffee Bean & Tea Leaf joins the MOA game

The Coffee Bean & Tea Leaf has been taking a slower path to putting mobile ordering on the menu. The 54-year-old company recently launched mobile order-ahead at all 191 company-owned stores in Arizona and Southern California, excluding its franchises, with plans to expand to franchise locations and other company-owned stores in 2018 and 2019. The service was beta tested at 22 locations and enables customers to browse drinks, customize items, receive exclusive discounts, save favorites for reordering and, of course, order and pay ahead. The app also features integration with Uber, allowing customers to request a ride to the nearest store.

Back to the drawing board

Chipotle rethinks in-store fulfillments

Chipotle Mexican Grill is also taking a new look at the design of its mobile ordering services. The burrito chain's focus is on reworking in-store processes to improve workflows and get burritos and bowls out the door faster. The company reported a 41 percent increase in mobile ordering between Q1 2017 and Q1 2018, a volume that prompted the need to more quickly accommodate.

Chipotle is now increasing implementation of its second lines of staff, a group supported by digital tools and dedicated to assembling meals for online orders. Its first line remains dedicated to serving in-store customers. The second lines are expected to roll out to at least 30 percent of the company's venues by the end of 2018. In a recent earnings call, CEO Brian Niccol, who joined Chipotle in March, also raised the idea of adding drive-throughs.

McDonald's focuses on improving mobile app

McDonald's has rolled out mobile order and pay to more than 20,000 of its 36,000 worldwide venues since unveiling the offering a year ago. In fact, 14,000 stores in the U.S. offer the service, as do several in Canada, the U.K., Germany, Australia and China. Its features include geolocation to detect when customers are nearby and trigger staff to begin preparing their orders, and the chain recently rolled out curbside delivery to supplement drive-through and pick up collection options. The McDonald's app has particularly driven an uptick in curbside delivery, according to CEO Steve Easterbrook.

McDonald's has also executed some targeted marketing, Easterbrook added, including a 32-days-of-offers promotion in Germany that was credited with producing more than 5 million downloads. He has cautioned that mobile app adoption is "pretty low," however, and that the company intends to focus on improving its offering before giving the service a broader advertising push. This includes employee trainings, and improvements to both the user experience and reliability of the technology.

Paytronix announces new mobile app with ordering

Digital communication tools provider Paytronix Systems Inc. has announced new services for the brands with which it works. A new version of the company's mobile app includes features to give its clients a greater ability to modify the mobile experiences they extend to their guests. One capability integrates online ordering platforms directly into the mobile apps, enabling online and rewards program access all in one place, according to the company. Others allow marketers to push "order now" messages to their apps, and to more easily adjust their apps' appearances.

Shake Shack backtracks on cash-free

QSR burger chain Shake Shack has officially dropped its cash-free store plans after trialing the change with a New York City location. What was meant as an initiative to boost efficiency instead blocked out and confused some customers. The cash-free locations required customers to order by smartphone or in-store kiosk, then receive a text when their orders were ready.

It appears pushback was strong, though, and CEO Randy Garutti admitted the message was loud and clear. Customers still want to pay by cash, and some struggled with the kiosk technology. Shake Shack plans to maintain use of the kiosks and add four or five venues with them by the end of Q2, but will also add cashiers to its cashless stores.

Dinner and a show

LevelUp, MonkeyMedia enhance partnership

Mobile ordering and payments platform LevelUp is hoping to "level up" its offering with a new integration. It recently

announced an enhanced partnership with cloud-based platform provider MonkeyMedia Software to enable the approximately 8,000 restaurants using the latter's platform to reach mobile-hungry customers through LevelUp's digital channels. In addition, consumers who use LevelUp-connected apps will now have the option to order from additional restaurants like Mama Fu's, La Boulanger and Boar's Head Café.

"Online ordering is becoming increasingly fragmented across channels," according to Joshua Churnick, Mama Fu's director of marketing. The integration would work to help simplify the experience for customers and expand the restaurants' access to a wider audience.

BJ's adds click-and-collect service

Big-box retailer BJ's Wholesale Club recently launched a new shop online, pick up in store feature for its members. Customers can place orders online and pick them up within two hours at any of the club's 215 locations, retrieving their purchases from a designated pick up location. Another new feature enables online shoppers to digitally add coupons to their cards, which will then be applied at checkout. Merchants often create friction by requiring digital coupons to be printed and handed to a cashier, BJ's said in an email, something this feature seeks to remove.

Atom Tickets' concessions push

Moviegoers have long been able to use Atom Tickets' app to order their concessions ahead while making online ticket purchases, but the company is seeking to further push usage with a new feature. The app now sends customers an alert on the day of the movie to remind them to preorder their snacks, and is displayed when the customer physically approaches the theater or nears his upcoming show time. It is offered at Southern and Megaplex Theaters, in addition to AMC Theaters, Regal Cinemas, Landmark Cinemas and Emagine Entertainment.

Response to Atom's original ordering service has so far been positive, with approximately one-third of its customers taking advantage of it. A recent company study found 52 percent of respondents said they bypassed concession purchasing because of long lines, and 50 percent said they would buy more items and more frequently if they could preorder.

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 restaurant operations. Providers have been scored and ranked based on three primary mobile order-ahead criteria:

01

02

03

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

LOYALTY INTEGRATIONS

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

APP USAGE

How many people interact with the app, including usage penetration rates, the number of monthly active users and the average session duration in seconds

PROVIDER*DIRECTORY*

Third-Party Aggregator Apps:

EAT24 · Chase 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 · Powered by Clorder · olo · splick.it · tilster · zuppler

Demand Side: QSR Branded Order-Ahead Apps

Applebee's · argo tea · FREEBIRDS WORLD BURRITO · 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 JOHN'S · Pizza Hut · PizzaRev CRAFT YOUR OWN · Portillo's BEEF · BURGERS · SALADS · POTBELLY SANDWICH SHOP · QDOBA MEXICAN EATS · QT QuikTrip

Quiznos MMMM...TOASTY! · SHAKE SHACK · SHEETZ MADE TO ORDER · DONATOS PIZZA SUBS SALADS · SONIC · Specialty's · STARBUCKS COFFEE · SUBWAY

sweetgreen · TACO BELL · TEXAS ROADHOUSE · T.G.I. FRIDAYS · tropical SMOOTHIE CAFE · veggiegrill · noon mediterranean · Wawa

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

Top Mobile Order-Ahead Provider

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	48	98
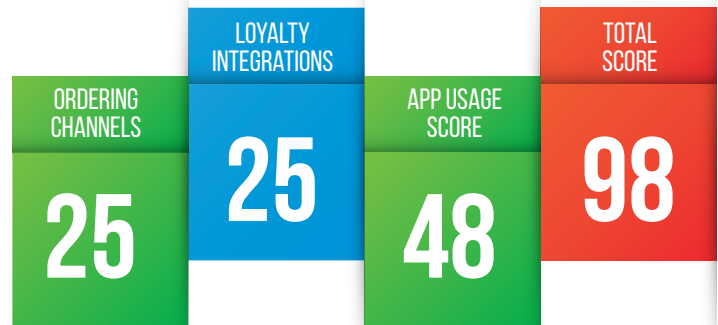
STARBUCKS

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. Users can also find nearby locations, customize orders and view an estimated time frame for order pickup.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	42	92

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.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	45	85
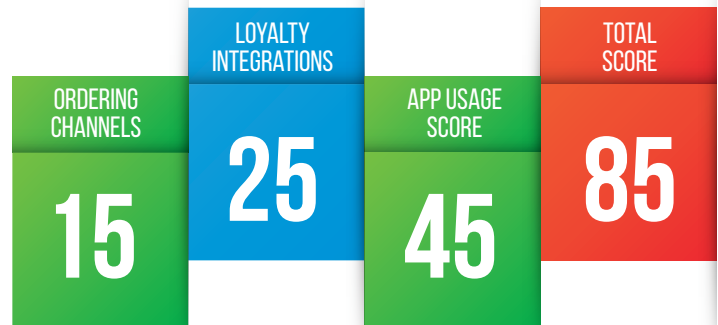
CHICK-FIL-A

Launch of mobile order service date: *June 2016*

The Chick-fil-A app allows guests to customize their order, pay in advance and skip the line when picking up their meal. It also offers a new rewards program and allows customers to save and reorder favorite items.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	31	81
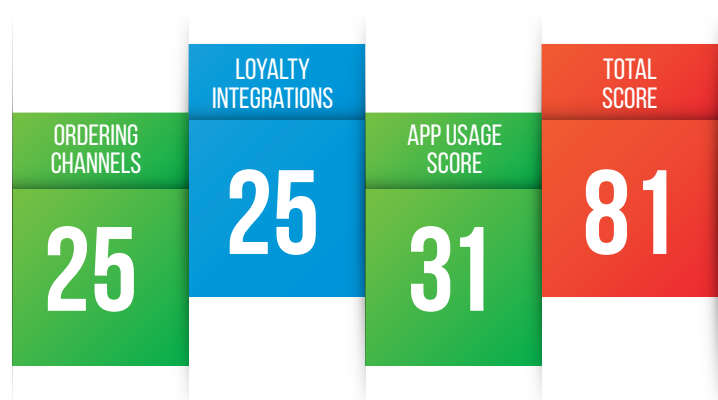
PIZZA HUT

Launch of mobile order service date: *August 2009*

The Pizza Hut app allows orders from a full and customizable menu. The app also helps customers find local deals and the closest stores. It has also the option to pay directly from the app and accepts voice orders.
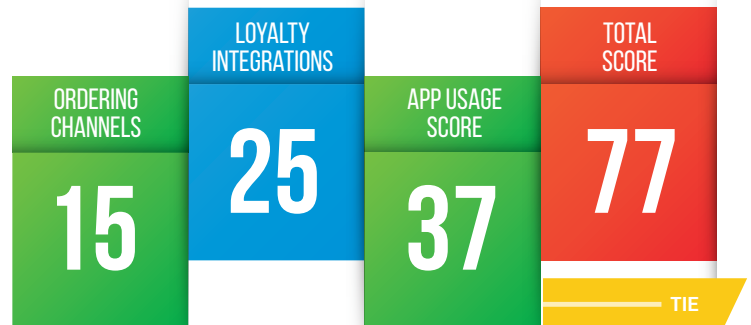
Companies are organized by score in ranking order.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	37	77
			TIE

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. The app also provides information on nearby locations.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	27	77
			TIE
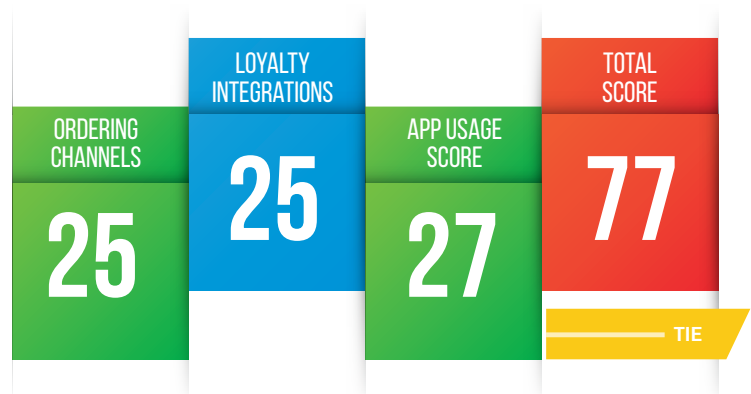
WINGSTOP

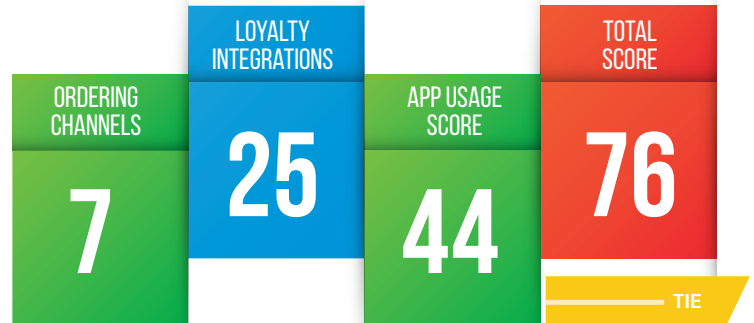**Launch of mobile order service date:** *August 2011*

The Wingstop app allows customers to order up to seven days in advance, customize their orders and find their nearest stores. They also can place orders with the Wingbot virtual ordering assistant through text message, Facebook Messenger, Twitter direct message or Alexa voice order.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	44	76
			TIE

DUNKIN' DONUTS

Launch of mobile order service date: *August 2012*

The Dunkin' Donuts app enables order-ahead. It also gives users free beverages on special occasions and integrates with the DD Card, Dunkin' Donuts prepaid card.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	44	76
			TIE
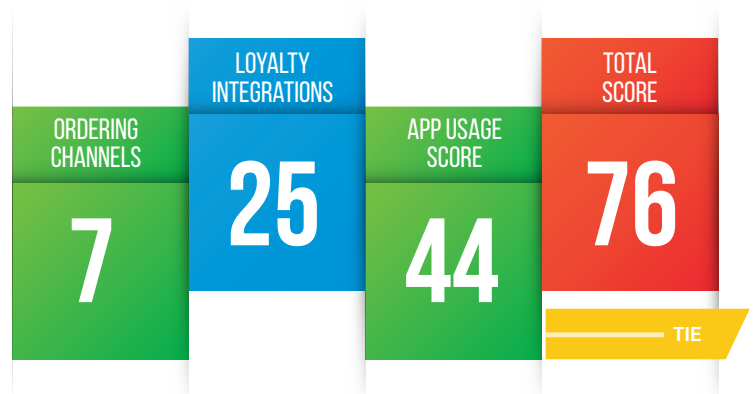
MCDONALD'S

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 orders for reordering, access exclusive discounts and find locations.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	42	74

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 a gift card as well as check their balances, earn rewards and find nutritional information.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	33	73
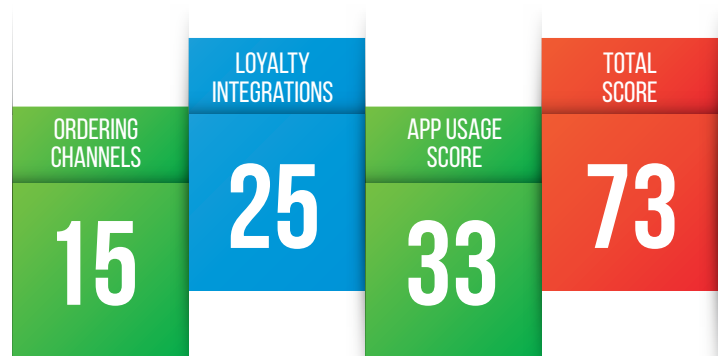
BURGER KING

Launch of mobile order service date: *May 2016*

The Burger King app is piloting an order-ahead tool via Facebook's Messenger chatbot. This service would allow customers to place meal orders, select a pickup location and pay for purchases.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	40	72

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	39	71

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 choose to eat in or get an order to go. The app also allows for customized menus and use of the MyPanera loyalty program.

SHAKE SHACK

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	30	70

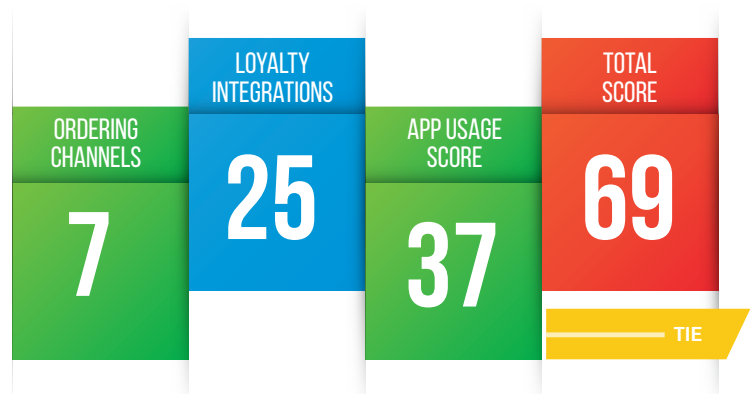**Launch of mobile order service date:** *October 2016*

The Shake Shack app enables customers to place orders in advance, create custom profiles and find Shake Shack restaurants based on their GPS location.

TROPICAL SMOOTHIE CAFE

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	37	69

TIE

Launch of mobile order service date: *March 2016*

The Tropical Smoothie Cafe app enables customers to order food and link a credit or debit card to make on-the-go payments when ordering ahead. It also offers an automatic reward credit earning feature.

sweetgreen

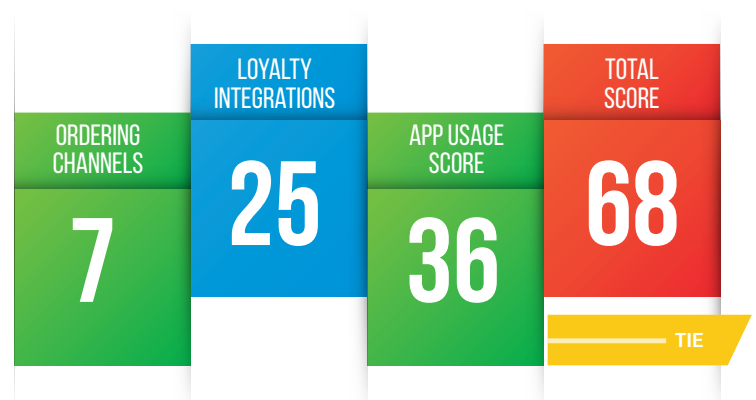| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	36	68 — TIE

SWEETGREEN

Launch of mobile order service date: *February 2013*

The Sweetgreen app allows users to order from a full menu and access a rewards program.

Update

FAST-FIRE'D BLAZE PIZZA

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	36	68 — TIE

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 an online order history, reordering capabilities and a nutrition calculator.
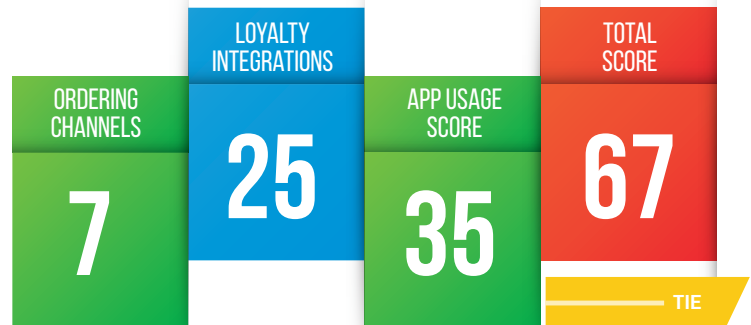
Update

QDOBA MEXICAN EATS

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	35	67

TIE
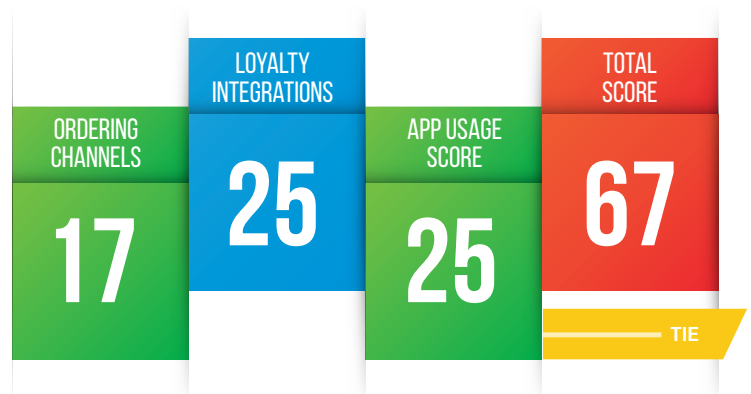
Launch of mobile order service date: *December 2016*

The QDOBA Rewards app allows users to order and pay in advance. Customers can accumulate points in their rewards accounts and find the nearest restaurant location.

Update

TACO BELL

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
17	25	25	67

TIE

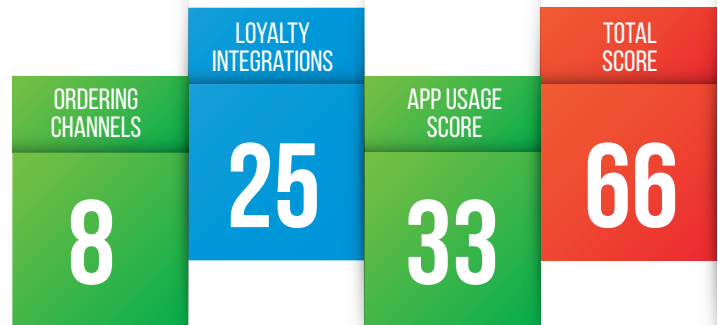**Launch of mobile order service date:** *October 2014*

The Taco Bell app allows users to order and pay via the app, set pick up times and use gift cards. Users can also opt-in to receive real-time order status updates.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	25	33	66

TGI FRIDAYS

Launch of mobile order service date: *July 2016*

The Fridays app allows patrons to order food and beverages for pick-up, pay directly from the table, find nearby Fridays locations, view the menu and add, check and claim points through the Fridays rewards program.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	33	65

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.

Update

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

TIE
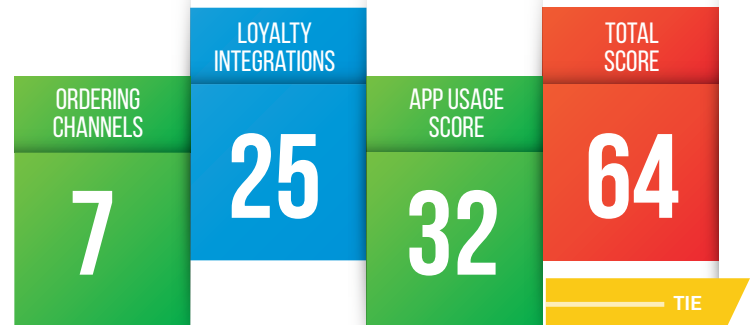
CHILI'S

Launch of mobile order service date: *September 2011*

The Chili's app enables customers to find the nearest restaurant, put their name on the seating wait list, 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	25	32	64

TIE

LA MADELEINE

Launch of mobile order service date: *February 2016*

The la Madeleine app allows customers to make orders, pay for orders and earn rewards. It also enables customers to find the closest restaurant location and view the restaurant's menu.
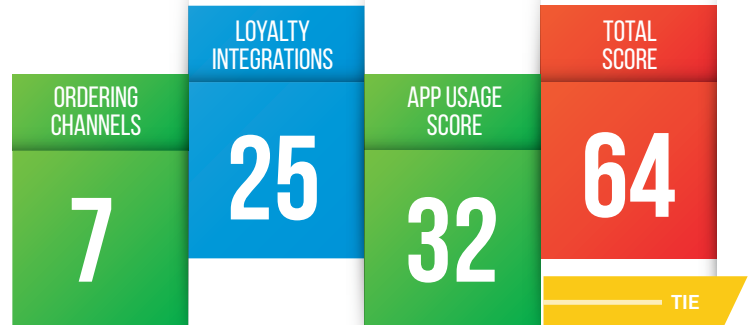
Update

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

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	37	62

QUIKTRIP

Launch of mobile order service date: *October 2015*

The QT app allows ordering for now or a particular time. It also offers exclusive deals and offers. Payments can be made in the app, and customers to log in to save orders and preferences. The app also locates nearby branches for customers.

Update

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

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	35	60

COSTA VIDA

Launch of mobile order service date: *November 2015*

The Costa Vida app features order ahead and rewards capabilities. It also displays special offers and encourages users to purchase gift cards for friends.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	27	59

POTBELLY SANDWICH SHOP

Launch of mobile order service date: *March 2017*

The Potbelly Sandwich Shop app lets patrons place orders for pick-up or delivery. It also includes Potbelly Perks loyalty program, with which customers earn "smiles" that are later exchanged for meals.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	33	58

TIE
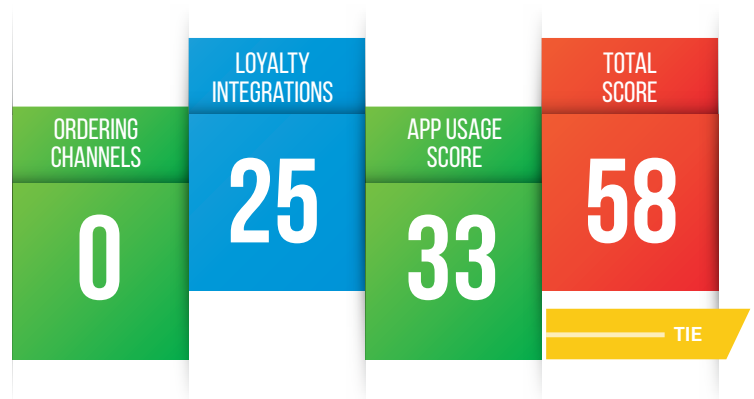
SHEETZ

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	26	58

TIE

PEI WEI

Launch of mobile order service date: *September 2016*

The Pei Wei Rewards app lets customers order and pay for meals in advance. It also saves order history, allows access to Pei Wei rewards program and displays special offers.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	25	57

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	23	55

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	29	54

TEXAS ROADHOUSE

Launch of mobile order service date: *November 2016*

The Texas Roadhouse app enables customer to reserve a place in the queue for a table before arriving. Users can also pay from the table and earn rewards.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	21	53

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.

Update

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

TIE
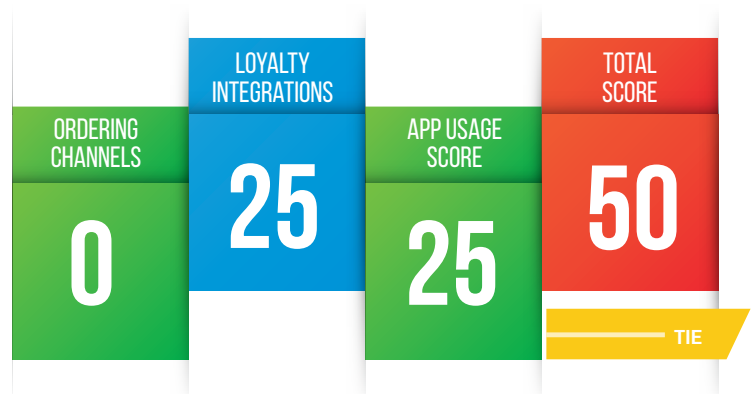
NOON MEDITERRANEAN

Launch of mobile order service date: *November 2016*

The Noon Rewards app allows guests to order items and pay for them in advance. Guests can also earn rewards points, including $9 for every $99 spent, and receive exclusive discounts.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	18	50

TIE
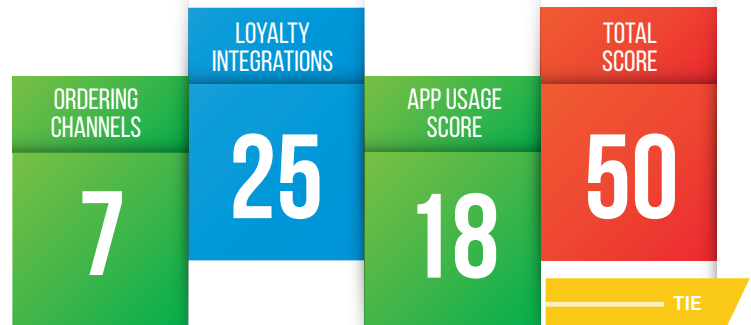
JERSEY MIKE'S

Launch of mobile order service date: *April 2014*

The Jersey Mike's app, created in partnership with Splick.it and available both via Android and iOS, this app lets customers locate Jersey Mike's restaurants, choose orders from the full menu, pay ahead and store favorite items for easy return ordering.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	17	49

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	16	48

TIE

FREEBIRDS

Launch of mobile order service date: *June 2016*

The Freebirds Restaurant app enables customers to place orders and pay via digital gift cards. Customers can scan receipts to earn rewards.
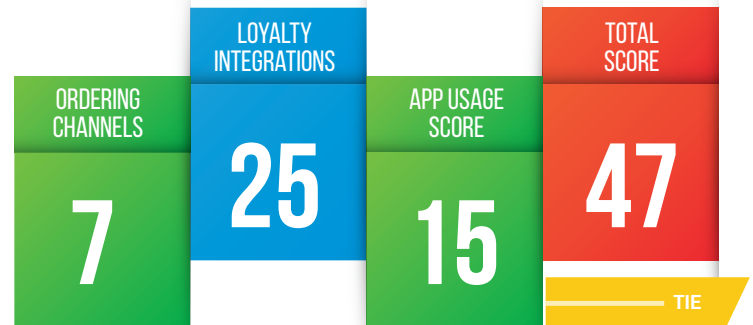
Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	25	15	48

TIE

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 the app to find the closest PizzaRev location and redeem rewards.

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	15	47 TIE

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 CAPAddits Rewards Program and features a store locator.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	15	47 TIE
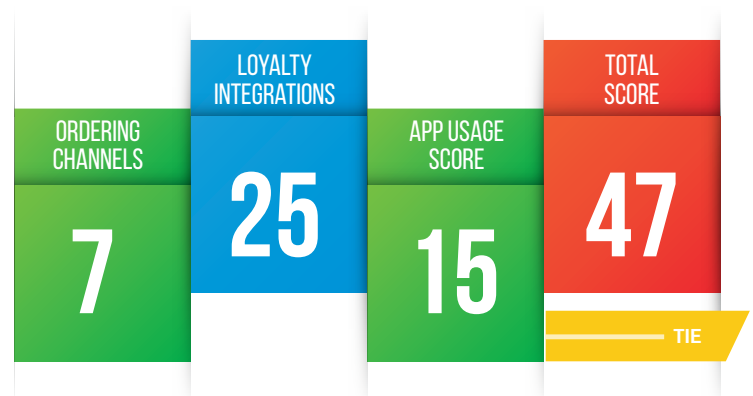
ARGO TEA

Launch of mobile order service date: *November 2014*

Argo Tea's app enables customers to preorder and prepay for purchases. It gives customers the option to scan a mobile device to pay at the counter when picking up their orders, and offers rewards and loyalty features including a reward for every 10 visits and credit for downloading the app.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	21	46

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 ordering. It helps patrons locate the nearest restaurant and tracks both purchases and rewards, including a $9 reward for every $99 spent.

Update

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

TIE
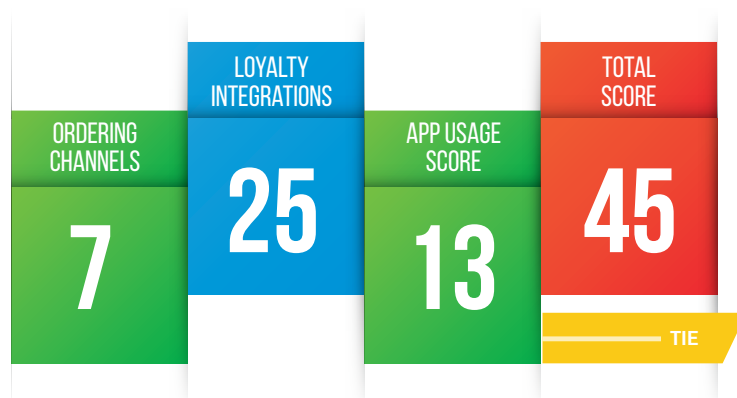
SNAP KITCHEN

Launch of mobile order service date: *December 2016*

Snap Kitchen's app enables users to earn order ahead prepared meals for pick up. Customers also can schedule meal deliveries for up to a week later.

Update

CHOPT
Creative Salad Company

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	20	45

TIE
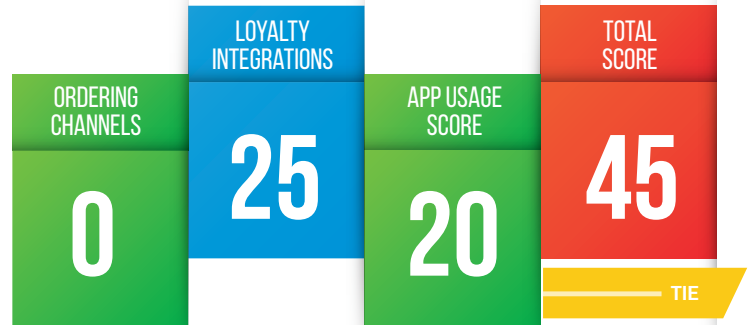
CHOP'T

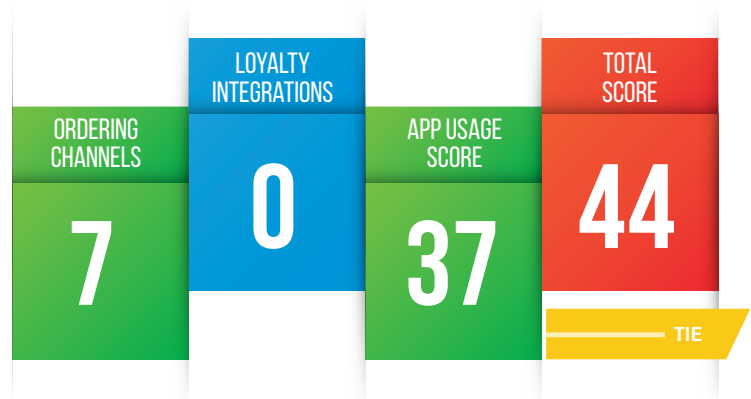**Launch of mobile order service date:** *November 2016*

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	37	44

TIE

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	12	44
			TIE
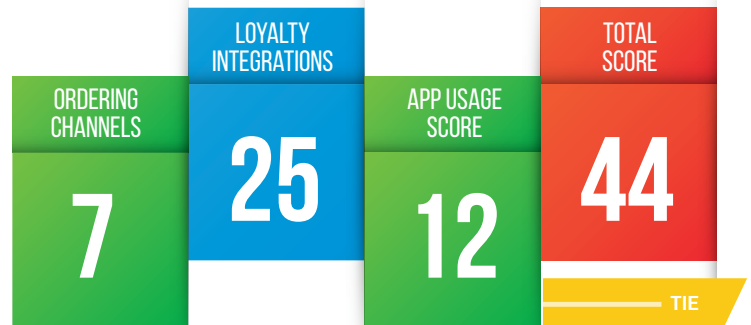
JAMBA JUICE

Launch of mobile order service date: *August 2015*

The Jamba Juice app helps guests skip the line by enabling them to order and pay in advance. Users can save their preferred stores, earn reward points on their purchases and reorder from saved recent orders.

Update

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

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 checks by scanning a bar code, as well as earn rewards points for purchases and discounts for referring friends.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	12	44

TIE
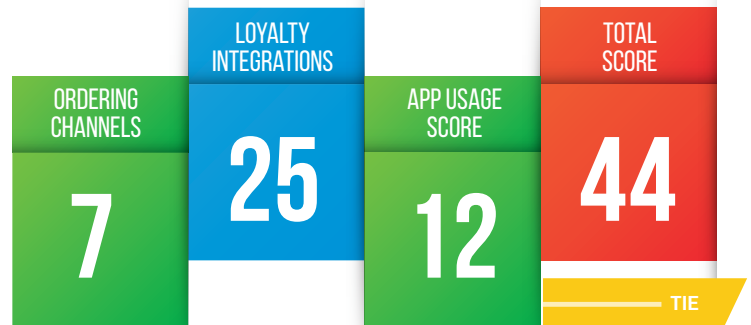
WHICH WICH

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	8	40
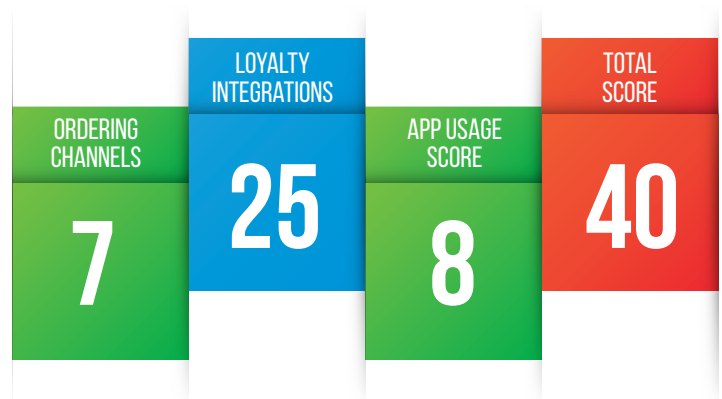
MOOYAH

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 program based on points obtained by scanning receipts.

Update

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

SUBWAY

Launch of mobile order service date: *July 2015*

The Subway app enables customers to place an order 15 minutes in advance. Users can save their order history and earn rewards at participating locations.
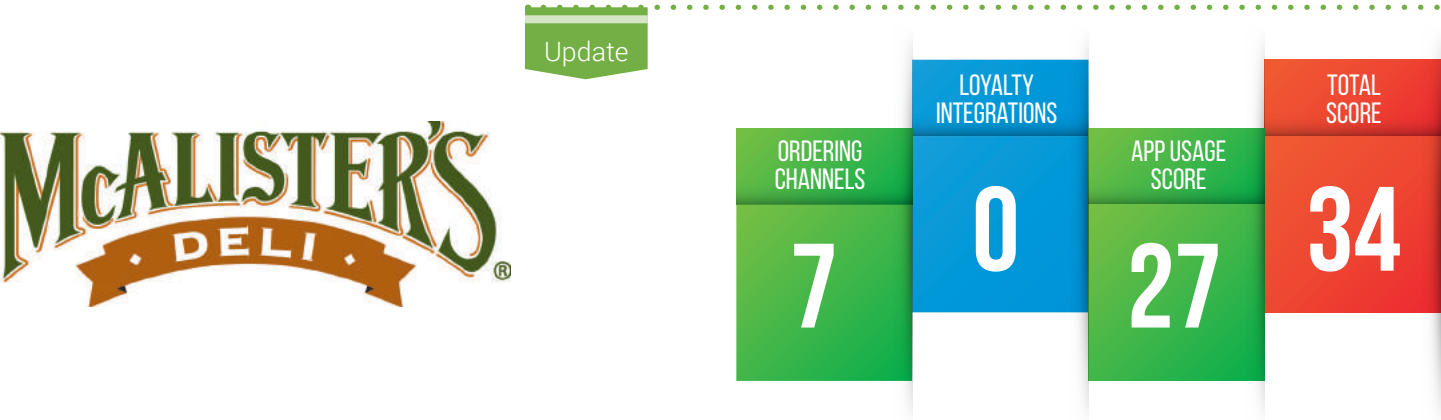
Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	10	35
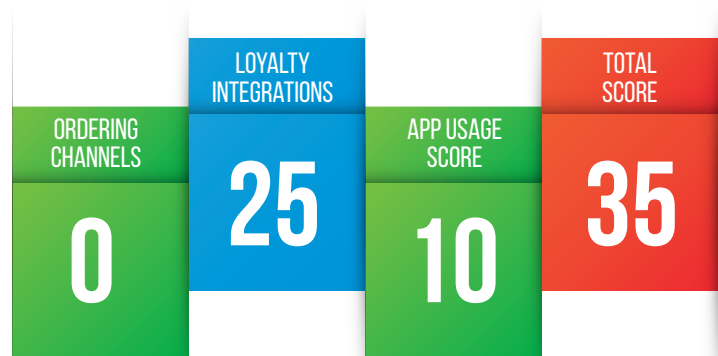
SPECIALTY'S CAFÉ & BAKERY

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 location and look up nutritional information for menu items.
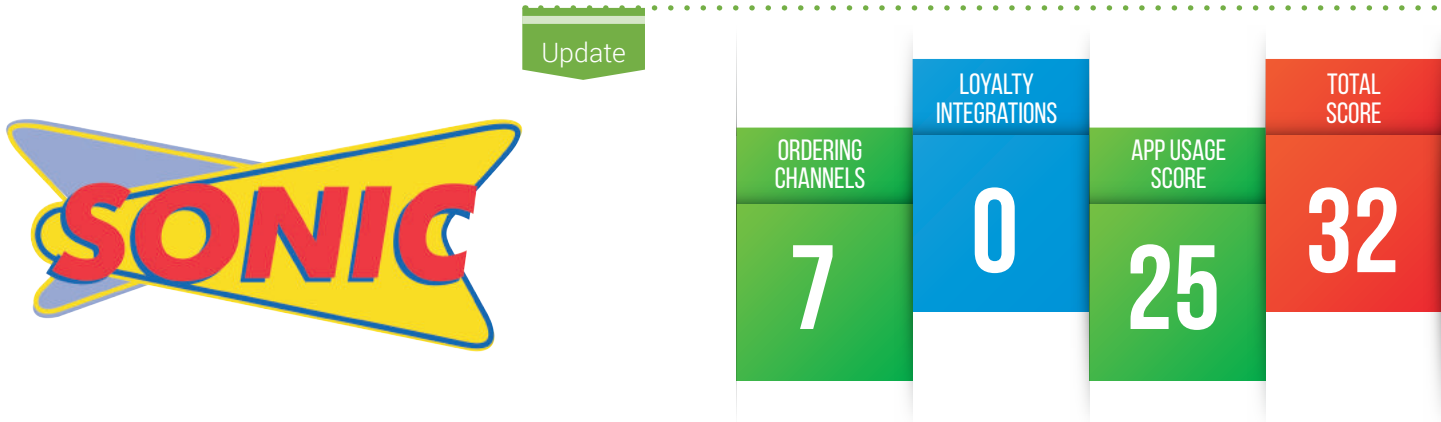
Companies are organized by score in ranking order.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	27	34

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	25	32

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.

Scorecard

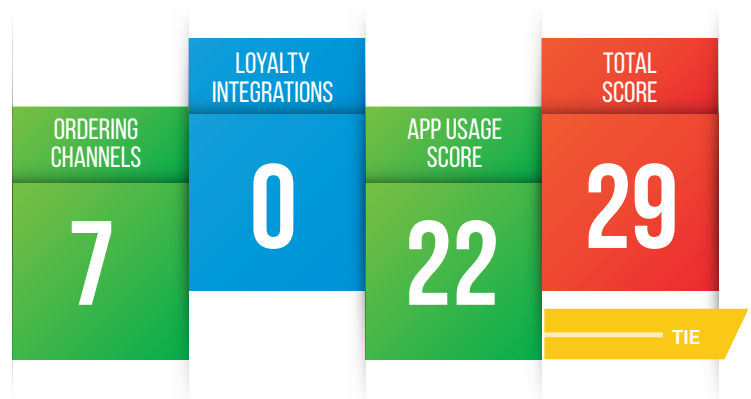*Companies are organized by score in ranking order.*

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	0	29	29 TIE
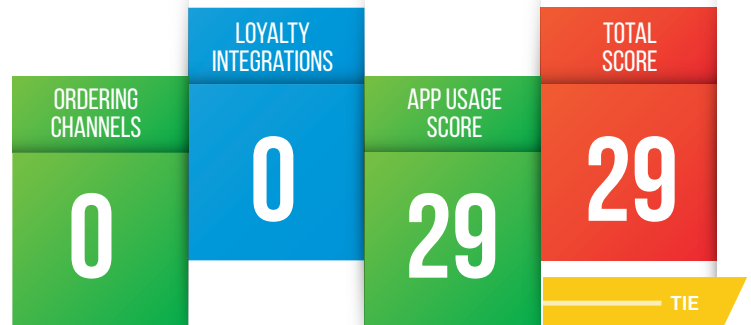
JIMMY JOHN'S

Launch of mobile order service date: *December 2014*

The Jimmy John's Sandwiches app allows patrons to order food and find the closest Jimmy John's to pick it up. If costumer signs in, orders are saved and can be repeated.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	22	29 TIE

HUNGRY HOWIE'S PIZZA

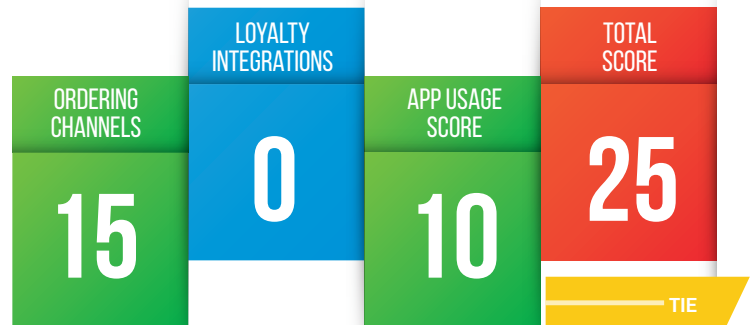**Launch of mobile order service date:** *January 2015*

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 a profile, save orders and reorder past purchases.

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Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	0	10	25

TIE

DENNY'S

Launch of mobile order service date: *May 2017*

The Denny's app allows customers to place an order for takeout or delivery. Nutritional information is displayed. Orders can be tracked and are saved together with payment information.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	18	25

TIE
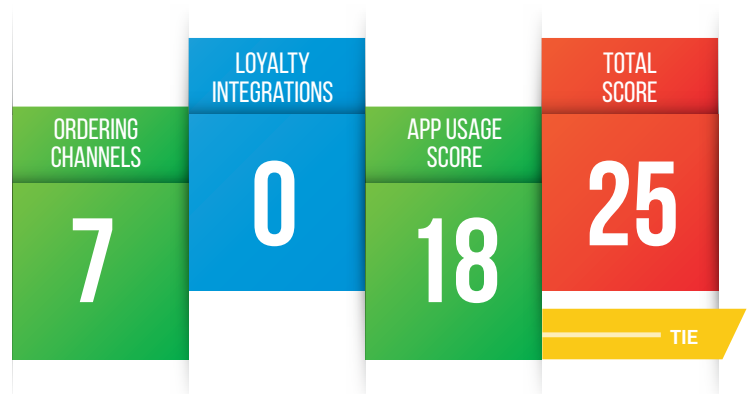
DONATOS

Launch of mobile order service date: *January 2017*

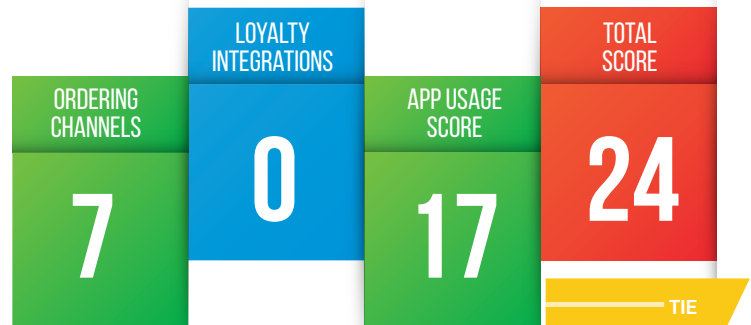The Donatos Pizza app allows customers to place orders and retrieve past order information.

Update

| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	17	24
			TIE

FIVE GUYS

Launch of mobile order service date: *August 2011*

The Five Guys Burgers & Fries app was developed by OLO. The app allows mobile ordering and order history capabilities, among other features.
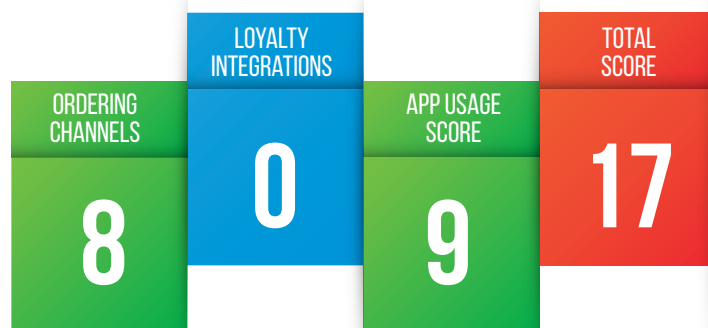
Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	17	24
			TIE
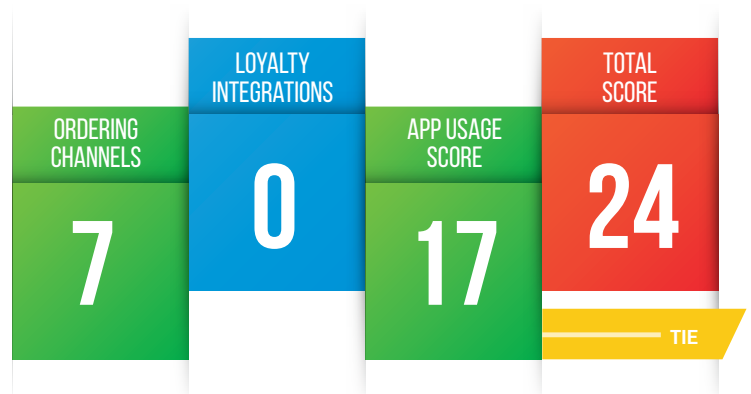
APPLEBEE'S

Launch of mobile order service date: *April 2016*

The Applebee's app allows customers to order and pay ahead. Users can also create an account to save favorite orders and earn loyalty points.

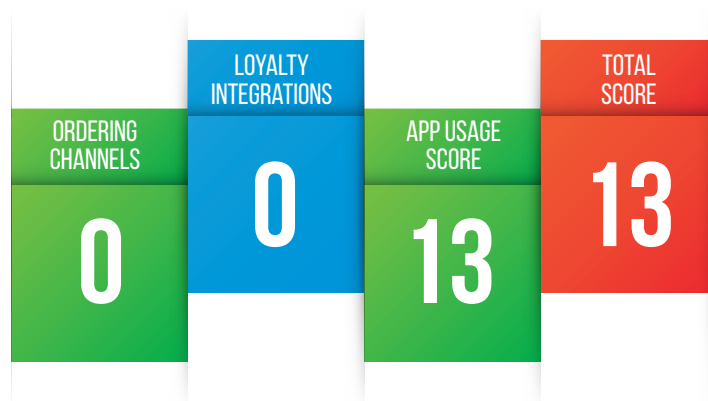| ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	0	9	17

PORTILLO'S

Launch of mobile order service date: *August 2016*

The Portillo's app enables patrons to place their order for drive-through, or in-store pick up.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	0	13	13

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 favorite meals for repeat ordering.

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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