PYMNTS.com

JUNE 2018

MOBILE ORDER-AHEAD Tracker™

How **Applebee's** Sees Digital Ordering Shaping Casual Dining

6 Applebee's is bringing mobile ordering to both casual dining and new channels
Page 6 (Feature Story)

11 Chipotle debuts drive-thru lanes
Page 11 (News and Trends)

17 The latest mobile order-ahead provider rankings
Page 17 (Scorecard)

Table of Contents

03 What's Inside
A look at recent developments in the mobile order-ahead space, including Chipotle and Apex's new efforts to streamline meal pickup

06 Feature Story
Scott Gladstone, vice president of strategy and development for Applebee's Neighborhood Grill + Bar, discusses both the casual dining restaurant's mobile ordering approach and extending ordering to new channels to meet shifting consumer habits

11 News and Trends
The latest mobile order-ahead headlines

15 Scoring Methodology
PYMNTS' criteria for evaluating and scoring the top apps in the space

17 Scorecard
The results are in.
See the top scorers and a provider directory featuring 77 players in the space.

47 About
Information on PYMNTS.com

© 2018 PYMNTS.com All Rights Reserved

No customer wants to be left waiting when hunger strikes. That's why quick-service restaurants (QSRs) have rolled up their sleeves, unveiled mobile order-ahead and reconfigured their kitchens to handle the increasing volume.

Preparing pre-ordered meals without disrupting the flow of in-store tickets calls for significant strategizing. From introducing a separate prep line designated solely for mobile orders, to a routing system that carefully times when each hits the kitchen, companies have tried a range of tactics to ensure meals are hot and ready to go when customers step through their doors.

Having orders ready on time is only half the battle, though. The other half is getting those orders into customers' hands after they leave the kitchen.

If a restaurant isn't careful, order-ahead customers may end up waiting in pickup lines so long they lose the time saved by preordering. Worse yet, a large crowd can descend on the pickup area all at once, creating a chaotic situation as customers attempt to claim their food purchases. These issues came to particularly glaring light in the early days of Starbuck's mobile order-ahead service, which has since become a well-worn cautionary tale.

To keep those woes in the past, solution providers are tackling the problem from a variety of angles. Supply chain solutions firm Apex Pick-Up Technologies has been working to help QSRs keep organized with a compartmentalized order collection locker into which staff load food and through which customers — with proper codes — can retrieve their purchases.

Similarly, Chipotle Mexican Grill seems to be taking a leaf out of Dunkin' Donuts' playbook. The burrito QSR recently debuted drive-through lanes exclusively for mobile order pickup in an attempt to shift the option into high gear.

Around the mobile order-ahead world

Customers are increasingly showing demand for mobile order-ahead services, making it a good time for companies to focus on smoothing out any frictions.

Among the newcomers is southeast Asia-inspired bowl provider Basil Box, which recently launched an offering enabling customers to build boxes of mix-and-match ingredients using an app. In a statement, founder Peter Chiu said the move intends to answer customers' desire for greater speed, convenience and customization.

In fact, mobile ordering is so popular that it's being used for more than just complete meals. Big-box retailer BJ's Wholesale Club has extended a pilot service to its deli meats and cheeses. Customers can now select from deli brands and customize slicing thickness via a mobile app, then collect their orders in 20 minutes or by the end of day.

© 2018 PYMNTS.com All Rights Reserved

Also emerging on the mobile ordering landscape is a long-promised service from Disneyland. Previously only available at the Disney World theme park and resorts in Orlando, Florida, or as part of a pilot test conducted by employees and passholders, mobile ordering is now open to all visitors to the Anaheim, California, amusement park location. Guests can use the Disneyland mobile app to place orders with a number of in-park restaurants, and receive notifications when their food is ready.

Applebee's on the mobile ordering buzz

Casual dining restaurants can't rely on just table service if they want to stay competitive. Mobile ordering helps capture loyal customers when they don't have the time to come in to dine, and keeps restaurants relevant in a retail world increasingly given to online shopping.

In this month's Mobile Order Ahead Tracker™ feature story (p. 6) Scott Gladstone, Applebee's Neighborhood Grill + Bar's vice president of strategy and development, explains the casual restaurant's approach to mobile ordering, its struggles to make menu items more travel-friendly and its efforts to get ahead of the next wave of changes in where and how customers want to order.

"It's not necessarily how the guests choose to order today, but it may be how they want to order in the near future: hands-free ordering from a car or from your home," Gladstone said. "We want to be ready for those continuing shifts and changes."

© 2018 PYMNTS.com All Rights Reserved

FIVE FAST FACTS

© 2018 PYMNTS.com All Rights Reserved

How Applebee's Sees Digital Ordering **Shaping Casual Dining**

> *Consumption patterns are changing, [too, and] most restaurant concepts in casual dining are really pursuing to-go because it's incremental — and it's where the customer is going.*
>
> - SCOTT GLADSTONE, **vice president of strategy and development at Applebee's**

"Fast" and "on-the-go" aren't just the buzzwords of QSRs anymore. Even casual dining restaurants are hopping on the mobile ordering bandwagon.

A growing number of such establishments are now looking beyond their own dinner tables, working to reach customers wherever they are and serving them in the ways they want to be served — whether through a device at the table, a mobile app or even a virtual assistant.

Scott Gladstone, vice president of strategy and development for Applebee's Neighborhood Grill + Bar, has seen this shift firsthand. In a recent interview, he told PYMNTS that eCommerce and mobile order-ahead trends are reshaping the casual dining landscape.

"[In the broader retail landscape], behavior is changing, and guests are more comfortable consuming and purchasing things on their phones and online," Gladstone said. "Consumption patterns are changing, [too, and] most restaurant concepts in casual dining are really pursuing to-go because it's incremental — and it's where the customer is going."

Eating good — and ordering ahead — in the neighborhood

On-premise dining is the core of Applebee's business, and is likely to remain the core in the near future. The restaurant chain is recognizing the growing importance of offering mobile order-ahead and online ordering channels, however.

© 2018 PYMNTS.com All Rights Reserved

Its dine-in and order-to-pickup offerings don't compete thus far, according to Gladstone. Instead, order-ahead services seem to cater to the millennial crowd and to customers who are too busy to dine in. Applebee's Carside to Go takeout diners, meanwhile, tend to have children or pets with them, making it more difficult to come into the restaurant.

> *There's going to be, at some point, the confluence of the mobile device coming into the restaurant.*

"They want to have that Applebee's experience, but they might not have the time or it's not the right occasion to consume it in the restaurant," he explained.

One major difference between dine-in and pickup orders is readily apparent, though: Gladstone says consumers who eat in tend to order more beverages than those who take their items to go. These order-ahead customers are taking their meals home, where they may already have drinks, but check totals tend to be more comparable when it comes to food items.

Cooking up more efficient mobile fulfillment

Introducing online and mobile ordering service has forced Applebee's to reexamine its software and hardware to make the flow of orders as efficient as possible.

One major area of focus has been ensuring proper order timing so kitchen staff members are not overwhelmed with requests at peak times, Gladstone explained, and so order-ahead volume doesn't compromise service to in-restaurant diners. The company conducted studies to ensure proper functioning, and has implemented careful limits on both pickup time slots and when orders appear on kitchen display systems.

UNDER THE HOOD

How do you expect restaurants' engagement with mobile to develop going forward?

"There's going to be, at some point, the confluence of the mobile device coming into the restaurant, whereas today, it's largely used by our guests to interact with us on our website or app to make an order to-go. Over the next several years, you'll start to see that type of evolution [in] how guests are interacting, either to order, pay or order-ahead to engage with the restaurant within the four walls. That's likely how mobile will continue to disrupt the restaurant industry, in addition to just opening up additional channels.

For us, what's quite interesting is how many marketplaces, third-party vendors and other channels are opening up because of both mobile and online ordering platforms. Whether it's third-party delivery, whether it's financial institutions that have their own marketplaces that they're setting up, whether it's other types of retail third-party marketplace experiences that are being generated by apps or websites. Our menu is being posted in so many more places than it's had access to in the past. We're trying to find ways to get our menu in front of guests wherever they want to interact with or consume it."

-SCOTT GLADSTONE, VICE PRESIDENT OF STRATEGY AND DEVELOPMENT AT APPLEBEE'S

© 2018 PYMNTS.com All Rights Reserved

Applebee's also recently reconsidered its food packaging for to-go orders after Gladstone and his team noticed not all items are created equally for dine-in and takeout.

"Ice cream does not travel as well as a burger or a steak," Gladstone said. "How do you present these items to a guest so they're still appetizing at the end of a 15- to 20-minute car ride?"

Customers select their items differently because of this, he explained, so the restaurant chain decided to design and roll out new packaging which made its debut in April. The new packaging better contains and separates dry from wet, keeping ice cream, soup and similar items from dripping and ensuring they're still appetizing when they reach a customer's home.

Changing service landscape

Gladstone believes customers will soon be using smartphones and other technology to help grab meals, regardless of whether they are sitting down or having their food to go.

"There's going to be, at some point, the confluence of the mobile device coming into the restaurant," he said. "Over the next several years, you'll start to see that type of evolution [in] how guests are interacting, either to order, pay or order-ahead to engage with the restaurant within the four walls."

Dine Brands, which oversees Applebee's, is currently exploring a service that would offer this blend of mobile and in-restaurant dining, enabling customers to order items ahead and have those items fully cooked when they arrive to eat. Applebee's sees its potential to tap more customers who want the dining experience but are tight on time, Gladstone explained.

Current practices suggest customers do have an appetite for using such technology. The restaurant already provides on-table devices that enable diners to place orders, swipe a card to pay a bill or play games. It has seen consistent growth in usage of these devices, too, suggesting customers may be ready to apply ordering technology to dine-in experiences.

"We've seen success with that, and that's an indication of guests' willingness to interact with mobile or technology within the restaurant," Gladstone said.

Applebee's future omnichannel strategy includes enabling menu ordering through third-party providers. It recently signed an agreement to allow voice ordering with Google assistant, as well as partnerships with Waze and General Motors to enable ordering from a car.

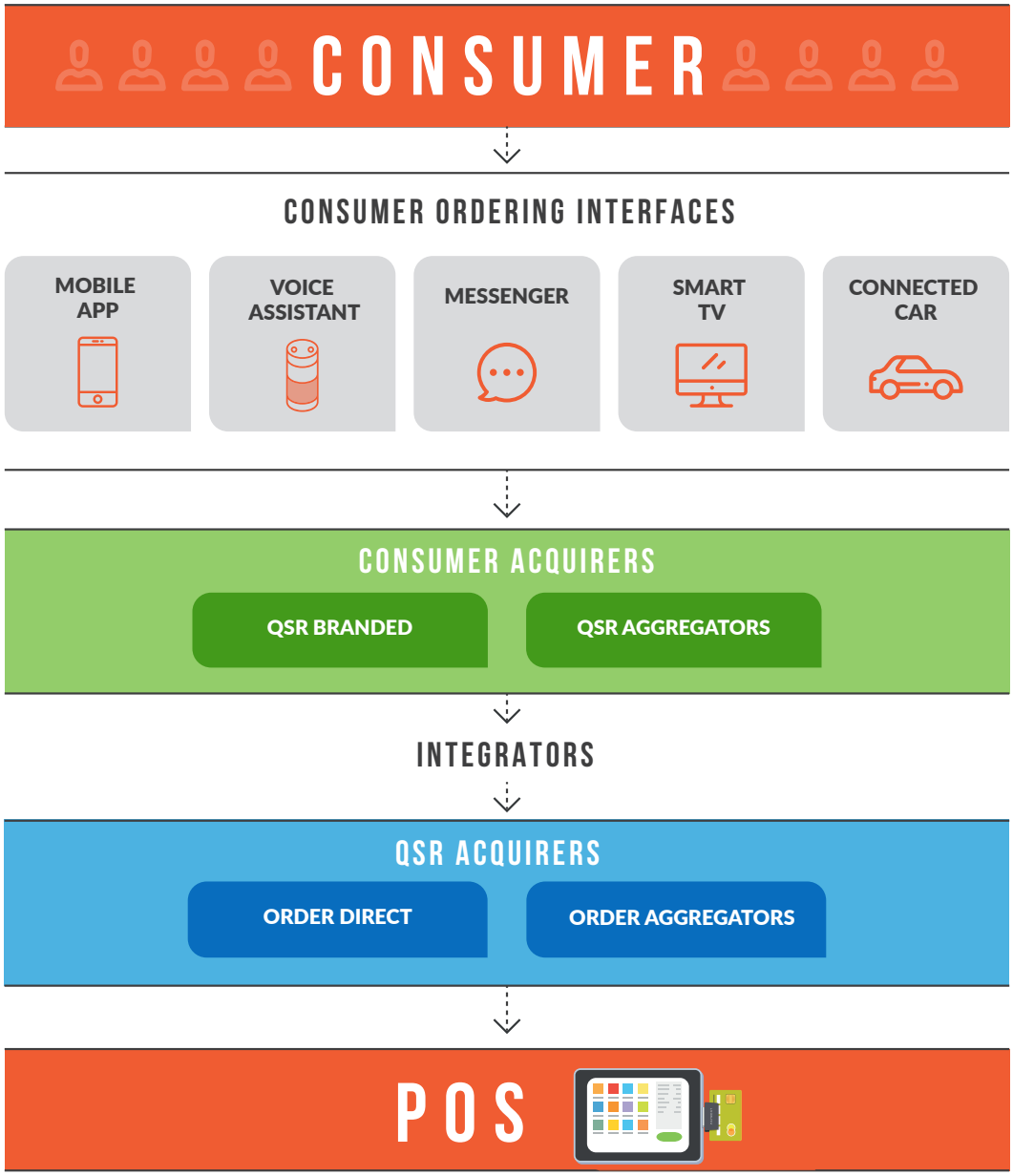
"These are emerging technologies," Gladstone noted. "It's not necessarily how the guests choose to order today, but it may be how they want to order in the near future: hands-free ordering from a car or from your home. We want to be ready for those continuing shifts and changes in the same way we're enhancing our mobile devices. If guests change the way they consume, we want to be ready for that."

Getting in front of hungry customers has so far meant having mobile apps, voice ordering and in-car ordering readily available, as well as preparing for whatever may come next. After all, not even casual dining is exempt as consumer purchasing moves increasingly online.

© 2018 PYMNTS.com All Rights Reserved

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.



© 2018 PYMNTS.com All Rights Reserved

Meals at the wheel

Chipotle debuts drive-through pickup

Chipotle's new CEO has been taking a multi-pronged approach to getting burritos into customers' hands more quickly. The latest of these efforts is a designated drive-through mobile order pickup lane enabling customers to collect their meals at a preset time. The lanes were recently added to five of the 2,500 total Chipotle locations, including two in Ohio and one each in Tennessee, Texas and Massachusetts. Plans reportedly call for bringing the service to Virginia this year, too.

This isn't Chipotle's only plan to drive business forward. The QSR recently partnered with delivery provider DoorDash to offer delivery at more than 1,500 restaurants. It also focused on upping its order fulfillment capacity in another recent effort, which saw the addition of a second meal prep line equipped with digital supports and designated solely for mobile order preparation.

Dunkin' rolls out VA concept store

Chipotle is not the only QSR with customers who are hungry for drive-through services. Back in January, coffee and donut chain Dunkin' Donuts announced a new concept store design which debuted in Quincy, Massachusetts. Its redesigned store features a layout focused on better serving mobile ordering customers, including a separate drive-through lane for mobile order pickup, a separate in-store queue, better serving equipment, new espresso machines and a new tap system for iced coffee and teas. Now, more customers will get their own tastes of that mobile-forward experience, as Dunkin' Donuts recently opened a new concept location in Hampton, Virginia.

Sonic launches mobile ordering

Sonic Drive-In is finally moving its mobile ordering service out of the trial stage, having officially launched the feature at locations in its headquarters of Oklahoma City on May 31. Customers can use the app to place orders and pay for meals by loading money onto a Sonic card before making their selections.

The QSR has reportedly been at work on this feature for approximately two years, testing the service in March in Lafayette, Louisiana. According to Matt Schein, Sonic's vice president of operations, systems and execution, part of the delay resulted from the rapid pace of innovation during

© 2018 PYMNTS.com All Rights Reserved

creation, which forced the company's developers to adapt to new technology as they built the app. Sonic's mobile order-ahead program won't be limited to Oklahoma City for long, though, as the QSR intends to bring it to all its locations by the end of 2018.

"All the data tells us consumers are moving toward utilizing smartphone technology," Schein told *The Oklahoman*.

Putting MOA to the test

Jack in the Box unboxes mobile ordering

Fast food chain Jack in the Box has reportedly been struggling, with its Q2 2018 earnings declining 7 percent and revenues dropping 21.1 percent from the year-ago quarter. To spring back, the QSR is now rolling out a new mobile app to help customers order and pay ahead. Plans for the app were announced in 2017, and the service is currently being trialed in select markets.

The service is only available in Hawaii and certain Oregon cities, according to the iTunes App Store, as well as San Diego, California, and the Texas cities of McAllen and Brownsville. Reports are positive thus far, with the mobile order features said to be drawing in higher spending. Jack in the Box expects an official rollout by year's end.

This news comes roughly a year after the QSR announced a new deal with online ordering platform Grubhub. As part of the partnership, Grubhub offers online ordering and delivery services in more than 20 markets around the U.S. The two companies plan to expand delivery services later this year.

BJ's expands deli ordering pilot

In the age of mobile ordering convenience, BJ's Wholesale Club consumers can now cut themselves a bigger slice of the… ham? The retailer is enabling its members to order deli meats and cheeses ahead via a mobile app service that's currently in pilot, recently extending the option to its stores in Rhode Island and Massachusetts. The new feature allows customers to place deli orders, request certain slicing thicknesses of selected meats and cheeses, track orders and pick them up within 20 minutes — though stores will hold orders until the end of the day. BJ's first rolled out its app in October 2017.

New entrants

Checking the mobile ordering Basil Box

Customized southeast Asia-inspired food boxes restaurant Basil Box has joined the mobile order-ahead game. According to a recent announcement from mobile order and payment

© 2018 PYMNTS.com All Rights Reserved

solution provider Smooth Commerce, which is powering the restaurant's digital ordering service, customers will now be able to place, pay for and earn loyalty rewards on orders via an iOS or Android app.

The move is in response to customers' demand for faster and more personalized service, Basil Box founder Peter Chiu said in a press release. The company can track customer analytics and loyalty through the offering, which will help facilitate targeted marketing campaigns using push notifications, SMS and in-app offerings.

Mobile ordering arrives at Disneyland

Disneyland has made its long-awaited mobile order-ahead solution a reality. All park visitors can now order their meals ahead — whether waiting in line for a ride or on their way to the park — from nine restaurants at Disney California Adventure and eight at Disneyland using the official Disneyland app. They can also pre-pay for their food using credit or debit cards, select a pickup time and elect to receive push notifications when their orders are ready. The service was tested with park employees and annual passholders prior to its broader release.

Mobile order-ahead services have long been available at restaurants located inside Orlando, Florida's Walt Disney World park and resort. All told, customers can now place mobile orders at more than 20 restaurants inside the theme park and resort property lines, according to the company's website.

Two ND Subways introduce mobile ordering

A pair of Jamestown, North Dakota, Subway sandwich shops are freshening their image with updates that include mobile ordering. These come as part of the company's national "Fresh Forward" tech-savvy redesign initiative, into which owners of individual stores can opt. The two stores are adding mobile order-ahead, but are bypassing an available self-serve kiosk component.

Both stores say customers will be able to pick up their items 15 minutes after ordering with the mobile order-ahead service, and do so via a designated in-store express lane. Fresh Forward was first launched in 2017, and Subway said at the time that it would extend the initiative to 44,000 worldwide locations over the next several years. The new mobile app has been the "most successful" part of Fresh Forward, according to Michigan-based regional Subway agent John Clark.

In-store innovation

Apex's bid to lock down order pickup

Speedy service is crucial when it comes to keeping restaurant customers happy. As such, self-service automation provider Apex Order Pick-Up Technologies recently announced a new

© 2018 PYMNTS.com All Rights Reserved

solution to help restaurants get orders to customers faster — without the chaos that infamously plagued Starbucks.

The company's Flow-Thru Locker Solution, consisting of a double-sided locker, enables employees to load orders through the back and customers to scan pickup codes and collect orders from the front. It integrates with a restaurant's point-of-sale, kitchen display and mobile apps, according to an Apex press release, and 12 QSRs and several food service operations have already signed on to implement the offering.

Dine Brands tests order-ahead for table service

Dine Brands, which oversees IHOP (or should we say IHOb?) and Applebee's Grill + Bar, is experimenting with a new type of mobile order-ahead service. The still-in-development offering would enable dine-in customers to place orders via a mobile app, according to reports, ensuring food is ready to be served to them when they arrive. Customers would then be able to pay their bills electronically.

Payment & partnership power-ups

Ritual rakes in Series C funding

Social mobile ordering app Ritual recently brought in a fresh flow of resources with the closing of a Series C funding round, which was led by Georgian Partners and saw participation from Greylock Partners, Insight Ventures and Mistral Venture Partners. The round brought in $70 million, upping Ritual's funding to $112.9 million in total.

The company offers an app to facilitate lunch ordering among coworkers. Users can order and pay ahead for meals from participating nearby restaurants, and members of a user's network can join an order, add their own purchases and have one person collect everyone's items. In a press release, Ritual said more than 44,500 workplace teams have used the app, and that its restaurant partnerships doubled in the past year.

Rakuten acquires Curbside

Meanwhile, mobile ordering technology company Curbside recently received a boost of its own: acquisition by Tokyo-based eCommerce giant Rakuten. Curbside supports its retailer partners' efforts to offer mobile order-ahead for curbside pickup, providing features like customer arrival time and inventory predictions that help stores prepare for incoming consumers and avoid listing out-of-stock items.

While the acquisition terms were not made public, Curbside will continue to operate independently as a Rakuten-owned company. The development is expected to give Curbside's partners — the QSRs and other retailers it serves — access to Rakuten's ecosystem of more than 1 billion merchants and customers, helping to grow the platform's global reach.

© 2018 PYMNTS.com All Rights Reserved

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:

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 active monthly users and the average session duration in seconds

© 2018 PYMNTS.com All Rights Reserved

PROVIDER*DIRECTORY*

Third-Party Aggregator Apps:

SDKs Enabling Branded Order-Ahead Apps:

Middleware Examples (Connecting Ordering Channels to POS):

Demand Side: QSR Branded Order-Ahead Apps

© 2018 PYMNTS.com All Rights Reserved

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

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

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	41	91

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	44	84

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.

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	41	81

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
7	25	45	77

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	25	36	76

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.

Update

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

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

TIE

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.

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
25	25	24	74

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	25	38	71

TIE

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
15	25	31	71

TIE

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 Shake Shack restaurants based on their GPS location.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	38	70

TIE

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
7	25	38	70

TIE

TROPICAL SMOOTHIE CAFE

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

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.

Update

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

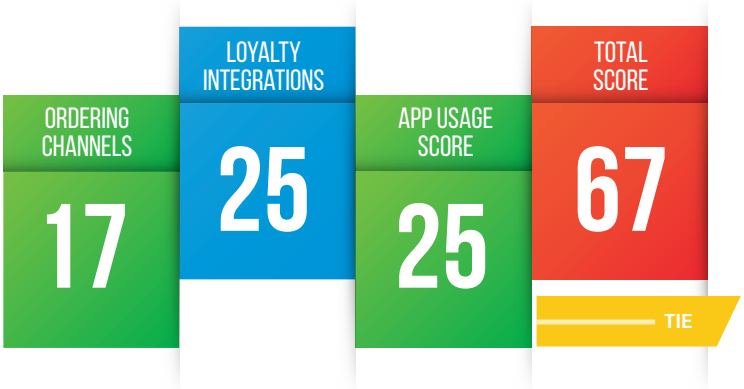
TIE

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.

© 2018 PYMNTS.com All Rights Reserved

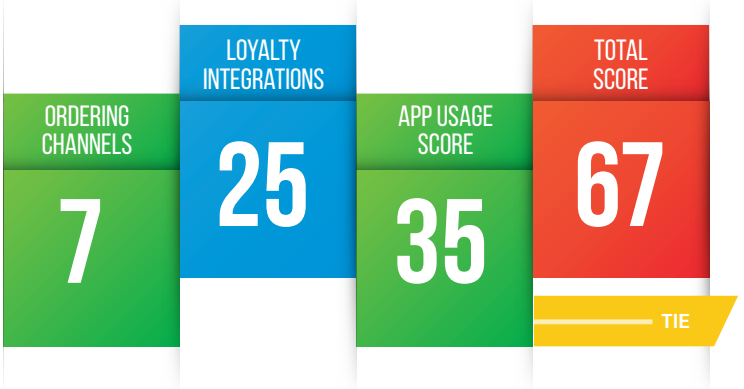


TACO BELL

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



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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	34	66

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
7	25	33	65

QDOBA MEXICAN EATS

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

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

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

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

TIE

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
0	25	37	62

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

TIE

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	29	61

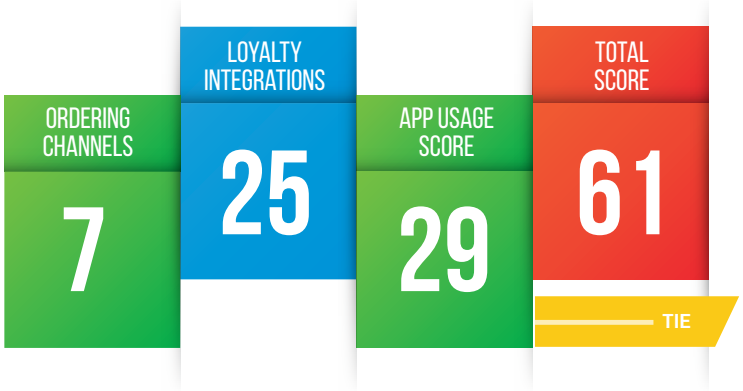
TIE

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.

© 2018 PYMNTS.com All Rights Reserved



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.

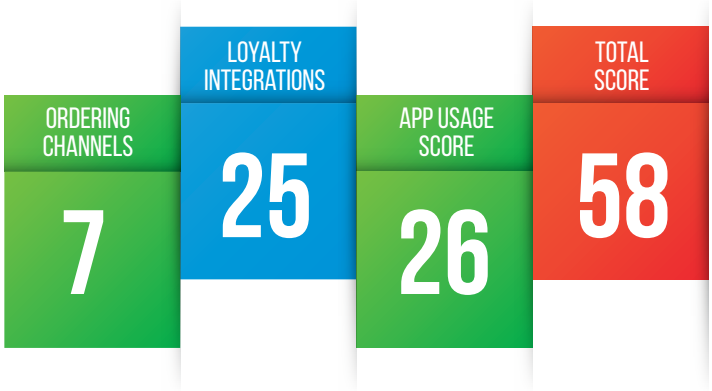
Update

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.

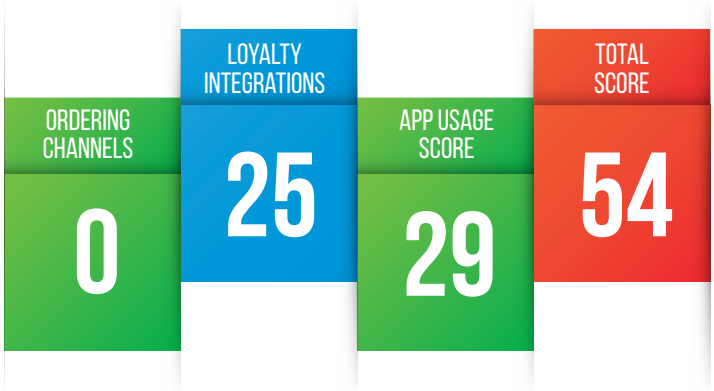
© 2018 PYMNTS.com All Rights Reserved



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.

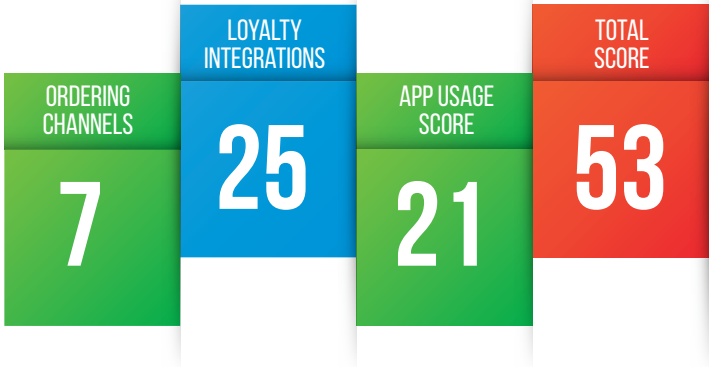


TEXAS ROADHOUSE

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.

© 2018 PYMNTS.com All Rights Reserved



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

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	27	52

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	20	52

TIE

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.

© 2018 PYMNTS.com All Rights Reserved

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

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

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

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
7	25	14	46

TIE

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	25	13	46

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.

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

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	13	45

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.

© 2018 PYMNTS.com All Rights Reserved

Update

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

TIE

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.

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.

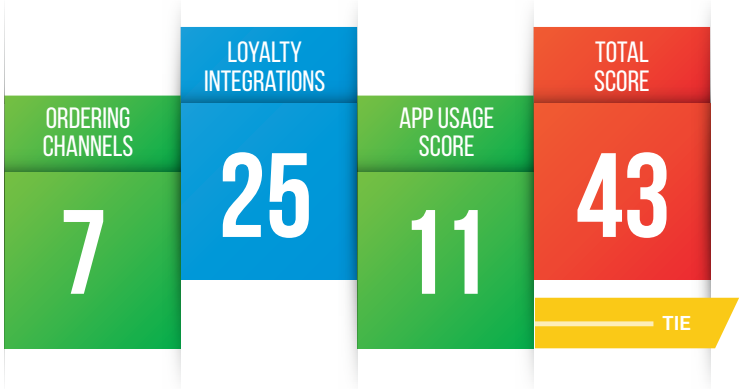
© 2018 PYMNTS.com All Rights Reserved

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



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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
0	25	16	41

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.

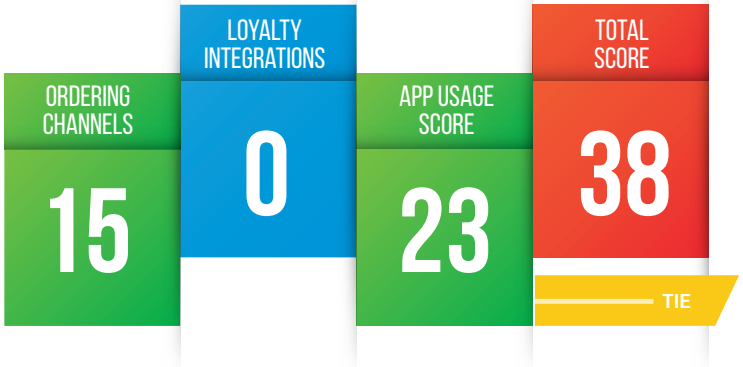
ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	25	8	40

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.

© 2018 PYMNTS.com All Rights Reserved

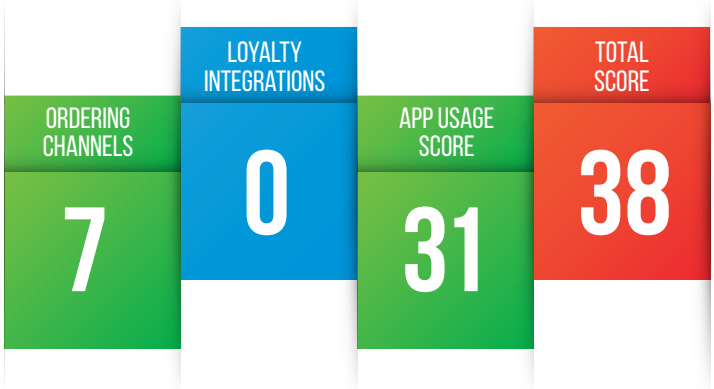


SUBWAY

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

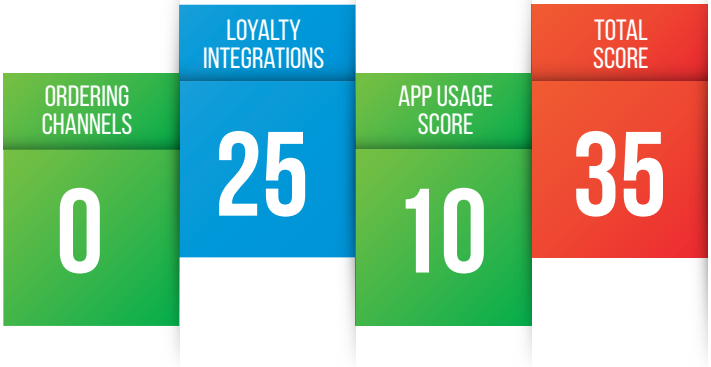


MCALISTER'S DELI

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.

© 2018 PYMNTS.com All Rights Reserved

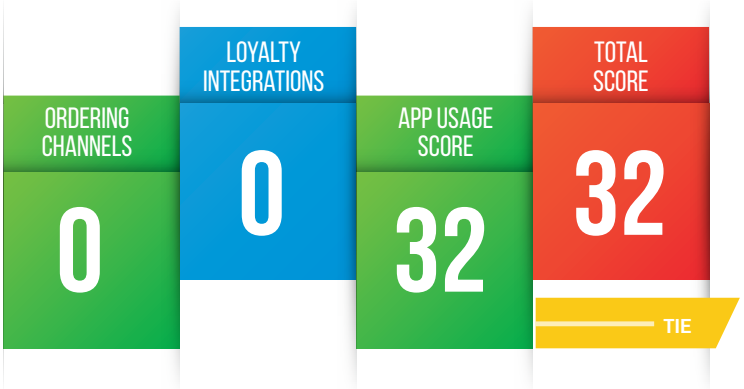


SPECIALTY'S CAFÉ & BAKERY

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.

Update



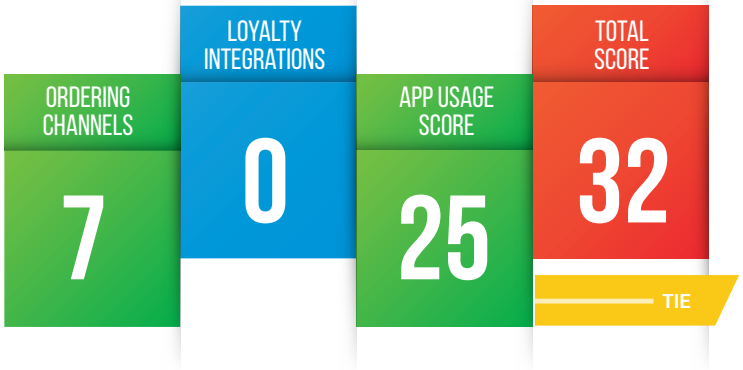
JIMMY JOHN'S

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.

© 2018 PYMNTS.com All Rights Reserved

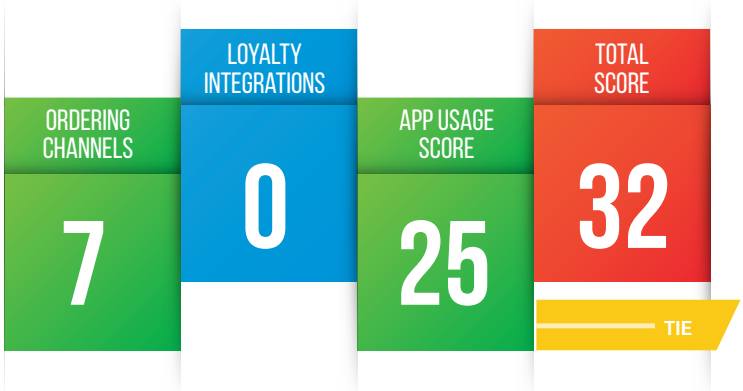
Update



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.



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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
7	0	20	27

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	20	27

TIE

DONATOS

Launch of mobile order service date: *January 2017*

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

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
15	0	9	24

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	14	21

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.

© 2018 PYMNTS.com All Rights Reserved

Update

ORDERING CHANNELS	LOYALTY INTEGRATIONS	APP USAGE SCORE	TOTAL SCORE
8	0	7	15

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	10	10

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.

© 2018 PYMNTS.com All Rights Reserved

About

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.

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 in which companies in payments share relevant information about the initiatives that shape the future of this dynamic sector and make news. Our data and analytics team includes economists, data scientists and industry analysts who work with companies to measure and quantify the innovation that is at the cutting edge of this new world.

© 2018 PYMNTS.com All Rights Reserved

Disclaimer

The Mobile Order-Ahead Tracker™ may be updated periodically. While reasonable efforts are made to keep the content accurate and up-to-date, PYMNTS.COM: MAKES NO REPRESENTATIONS OR WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED, REGARDING THE CORRECTNESS, ACCURACY, COMPLETENESS, ADEQUACY, OR RELIABILITY OF OR THE USE OF OR RESULTS THAT MAY BE GENERATED FROM THE USE OF THE INFORMATION OR THAT THE CONTENT WILL SATISFY YOUR REQUIREMENTS OR EXPECTATIONS. THE CONTENT IS PROVIDED "AS IS" AND ON AN "AS AVAILABLE" BASIS. YOU EXPRESSLY AGREE THAT YOUR USE OF THE CONTENT IS AT YOUR SOLE RISK. PYMNTS.COM SHALL HAVE NO LIABILITY FOR ANY INTERRUPTIONS IN THE CONTENT THAT IS PROVIDED AND DISCLAIMS ALL WARRANTIES WITH REGARD TO THE CONTENT, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT AND TITLE. SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OF CERTAIN WARRANTIES, AND, IN SUCH CASES, THE STATED EXCLUSIONS DO NOT APPLY. PYMNTS.COM RESERVES THE RIGHT AND SHOULD NOT BE LIABLE SHOULD IT EXERCISE ITS RIGHT TO MODIFY, INTERRUPT, OR DISCONTINUE THE AVAILABILITY OF THE CONTENT OR ANY COMPONENT
OF IT WITH OR WITHOUT NOTICE.

PYMNTS.COM SHALL NOT BE LIABLE FOR ANY DAMAGES WHATSOEVER, AND, IN PARTICULAR, SHALL NOT BE LIABLE FOR ANY SPECIAL, INDIRECT, CONSEQUENTIAL, OR INCIDENTAL DAMAGES, OR DAMAGES FOR LOST PROFITS, LOSS OF REVENUE, OR LOSS OF USE, ARISING OUT OF OR RELATED TO THE CONTENT, WHETHER SUCH DAMAGES ARISE IN CONTRACT, NEGLIGENCE, TORT, UNDER STATUTE, IN EQUITY, AT LAW, OR OTHERWISE, EVEN IF PYMNTS.COM HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

SOME JURISDICTIONS DO NOT ALLOW FOR THE LIMITATION OR EXCLUSION OF LIABILITY FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES, AND IN SUCH CASES SOME OF THE ABOVE LIMITATIONS DO NOT APPLY. THE ABOVE DISCLAIMERS AND LIMITATIONS ARE PROVIDED BY PYMNTS.COM AND ITS PARENTS, AFFILIATED AND RELATED COMPANIES, CONTRACTORS, AND SPONSORS, AND EACH OF ITS RESPECTIVE DIRECTORS, OFFICERS, MEMBERS, EMPLOYEES, AGENTS, CONTENT COMPONENT PROVIDERS, LICENSORS, AND ADVISERS.

Components of the content original to and the compilation produced by PYMNTS.COM is the property of PYMNTS.COM and cannot be reproduced without its prior written permission.

You agree to indemnify and hold harmless, PYMNTS.COM, its parents, affiliated and related companies, contractors and sponsors, and each of its respective directors, officers, members, employees, agents, content component providers, licensors, and advisers, from and against any and all claims, actions, demands, liabilities, costs, and expenses, including, without limitation, reasonable attorneys' fees, resulting from your breach of any provision of this Agreement, your access to or use of the content provided to you, the PYMNTS.COM services, or any third party's rights, including, but not limited to, copyright, patent, other proprietary rights, and defamation law. You agree to cooperate fully with PYMNTS.COM in developing and asserting any available defenses in connection with a claim subject to indemnification by you under this Agreement.

© 2018 PYMNTS.com All Rights Reserved