



Digital Maturity Benchmark

# Restaurant Industry 2022

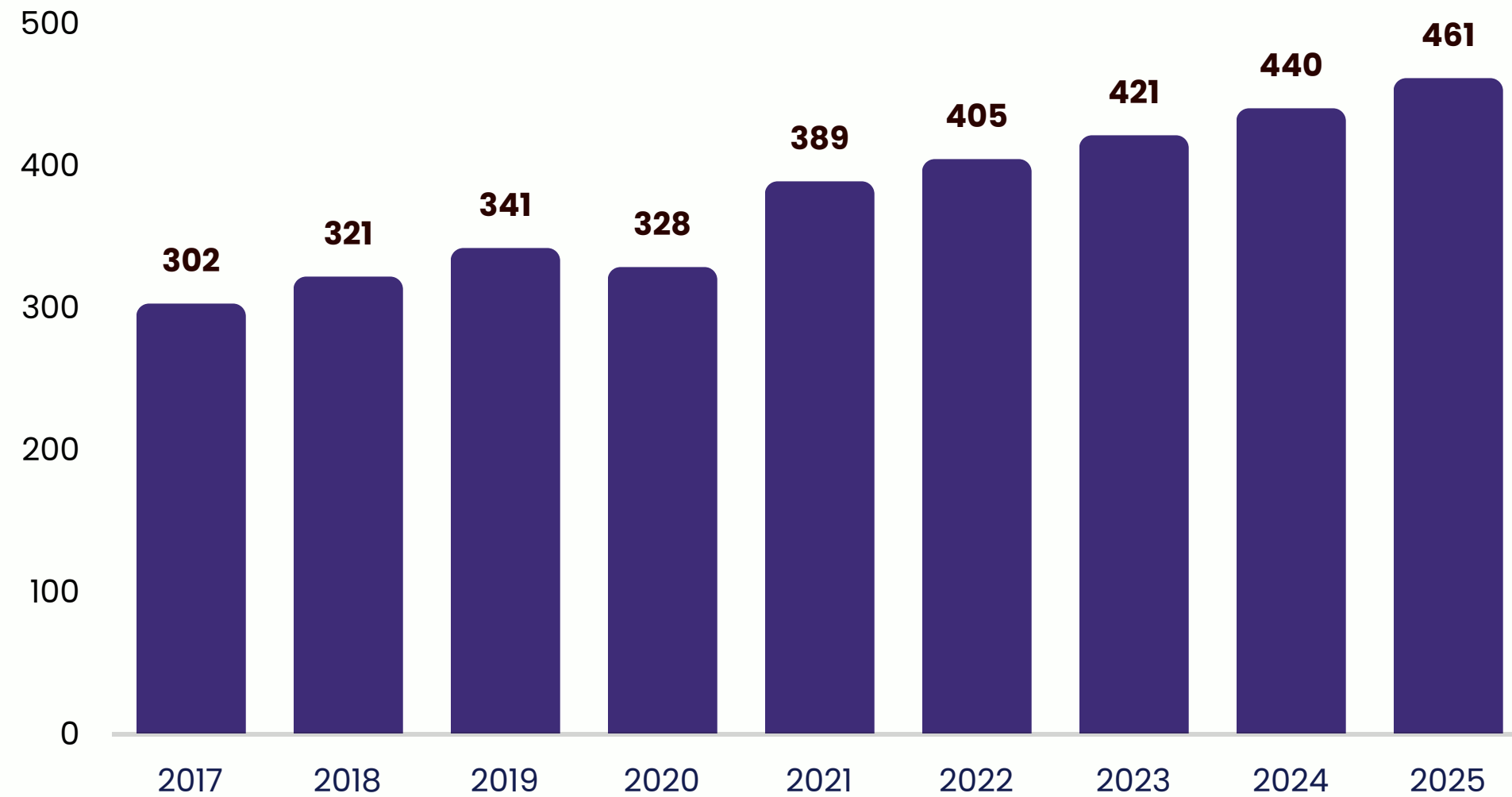


*Market Trends*  
**Consumer Behavior & Outlook**

## Restaurants rebounded in 2021, with sales returning to pre-pandemic projections.

Rising customer sentiment, large-scale vaccination rollouts and reduced restrictions led to a year of high growth for the restaurant industry. Sales exceeded initial forecasts, returning to pre-pandemic growth projections, despite supply chain challenges, including item availability.

Sales of Limited Service Restaurants (in billions USD)



### 3X higher

growth experienced for digital food orders post-pandemic

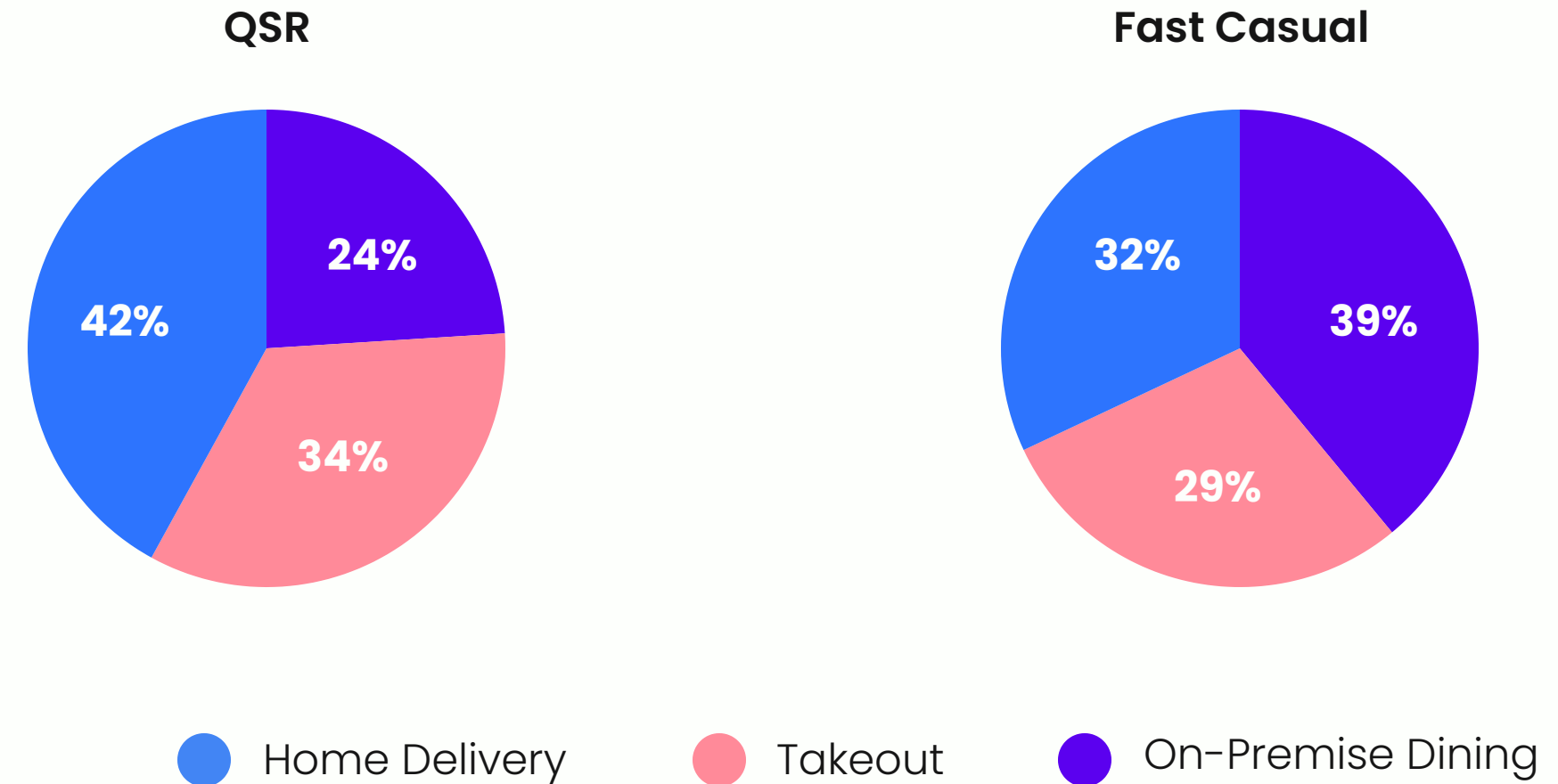
### 61% of customers

order food digitally at least once a week, up from 29% a year ago

**With more than 60% of sales coming from off-premise dining, digital ordering is the priority for growth.**

76% of QSR revenue comes from takeout and home delivery compared to 61% of fast casual restaurants. While safety was the spark that fuelled this digital dependence, the convenience of digital ordering and expansion of different fulfillment options will ensure digital channels' stickiness, even as customers resume normal activities and slowly increase their restaurant visits.

### Sales Contribution of Limited Service Restaurants



### 74% of restaurants

have seen an increase in the contribution of off-premise revenue since 2019.

### 40% of restaurants

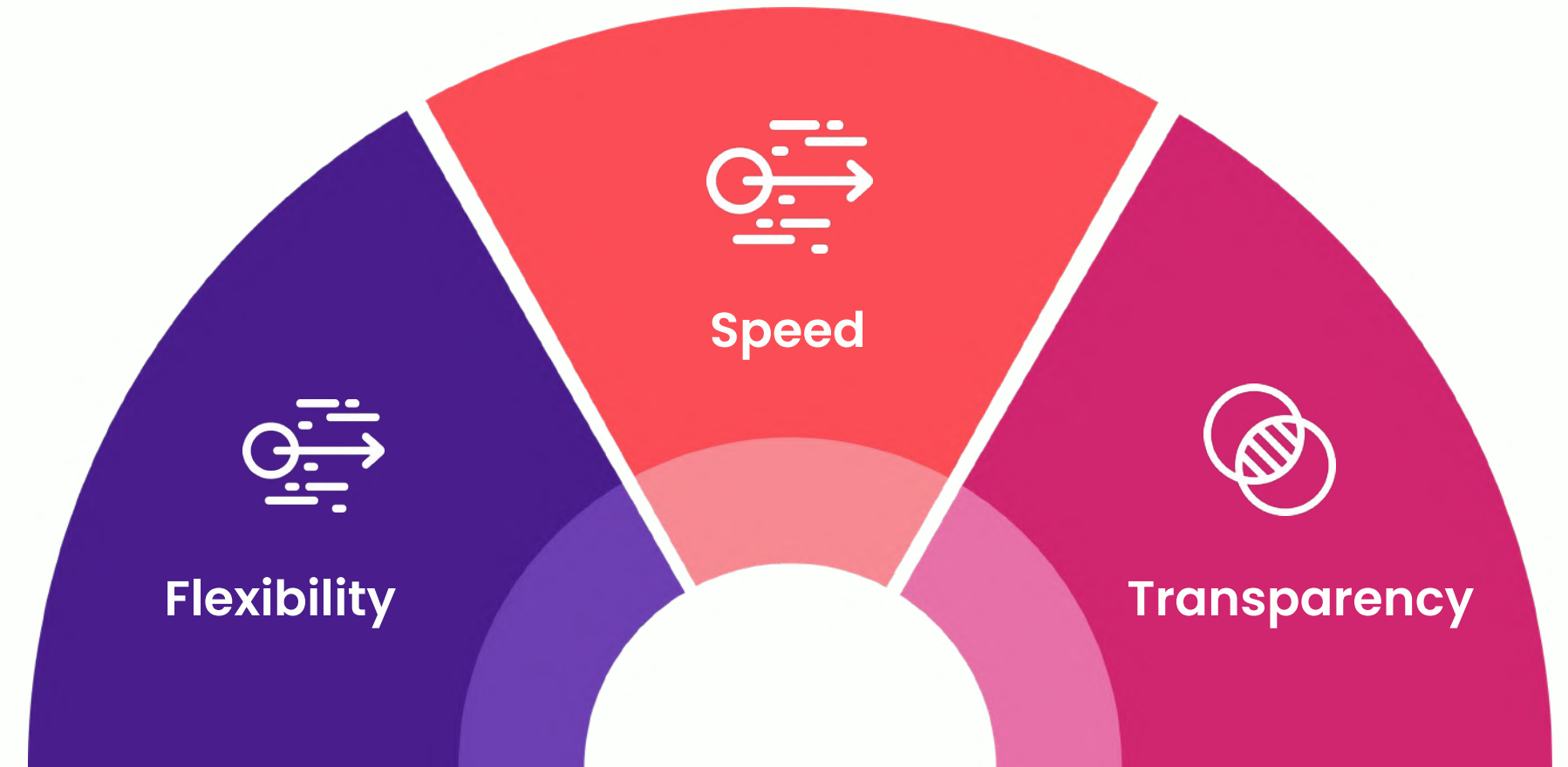
have dedicated the bulk of their resources to expand their off-premise business.

# Shoppers expect greater flexibility, speed and transparency from their food purchases.

With safety emerging as a top-of-mind issue, on-premise dining has been in decline since 2020 and digital channels are driving industry growth. With digital ordering becoming table stakes, shoppers have high expectations from the ordering experience.

## 4X higher preference

for a restaurant's own mobile app vs. a third-party aggregator app



**Flexibility** includes placing and receiving orders via multiple channels, the option to customize dishes and the option to pay according to customers' method of choice.

E.g. Let me build my order by customizing the ingredients, and choose to either pick it up at drive-thru or get it delivered to any location of choice.

**Speed** includes efficiently finding products, placing orders, preparing and receiving the order according to the consumers' channel of choice.

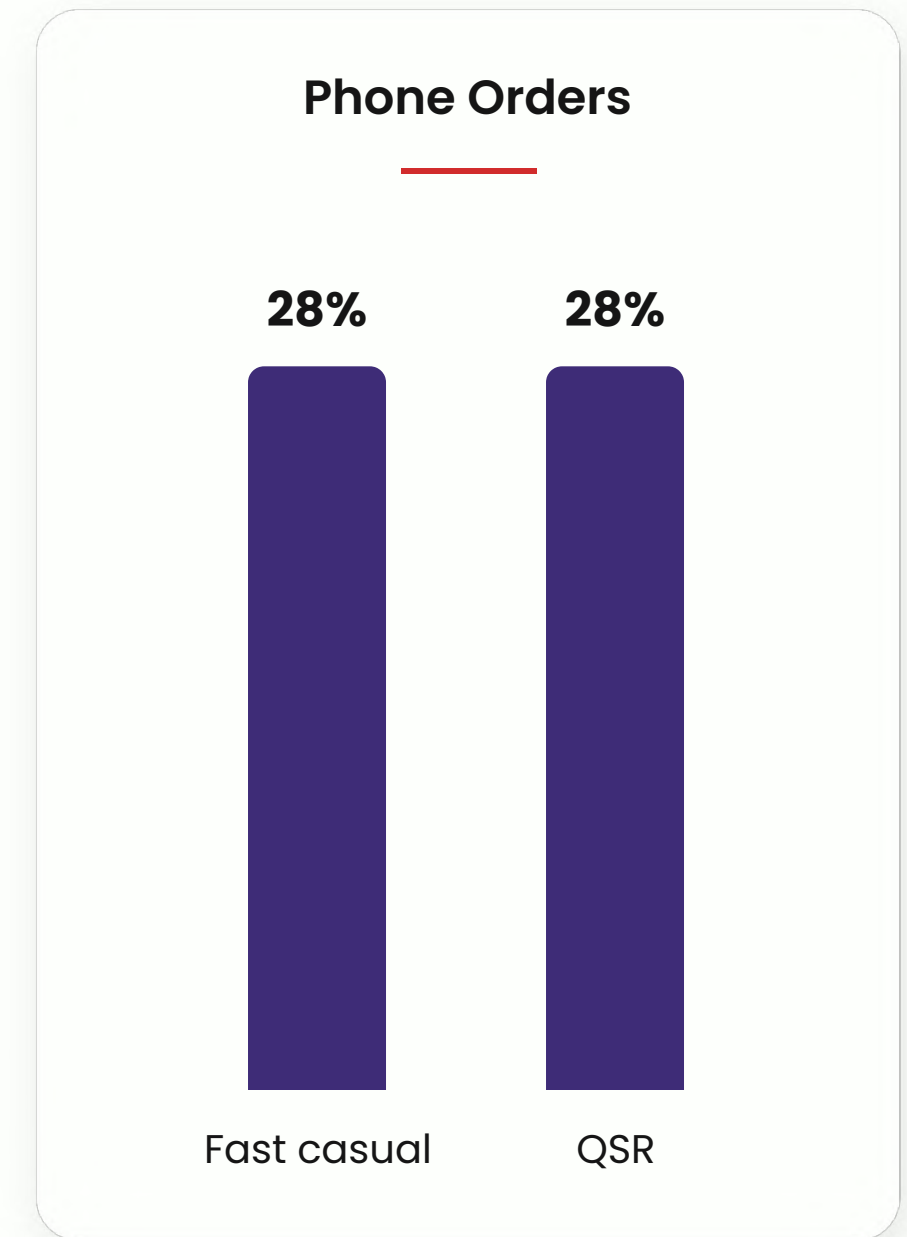
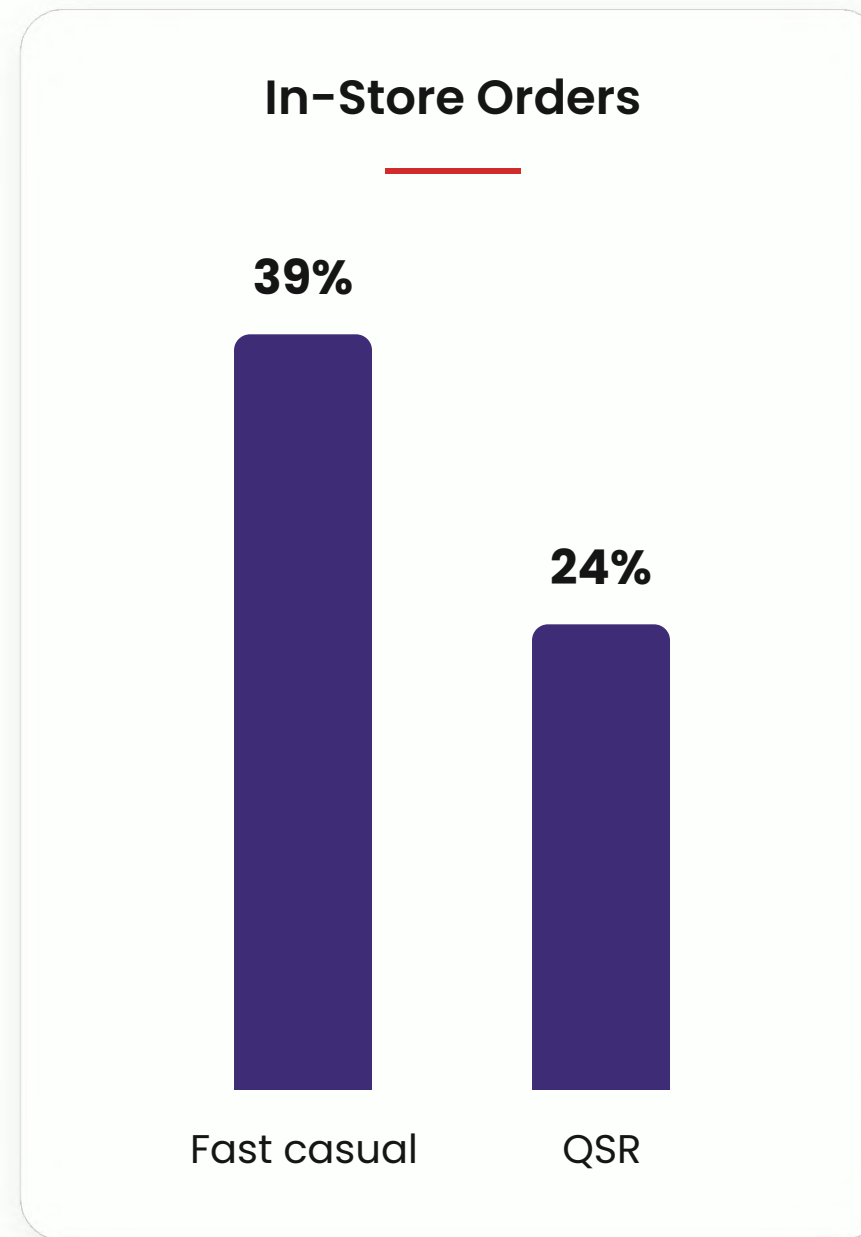
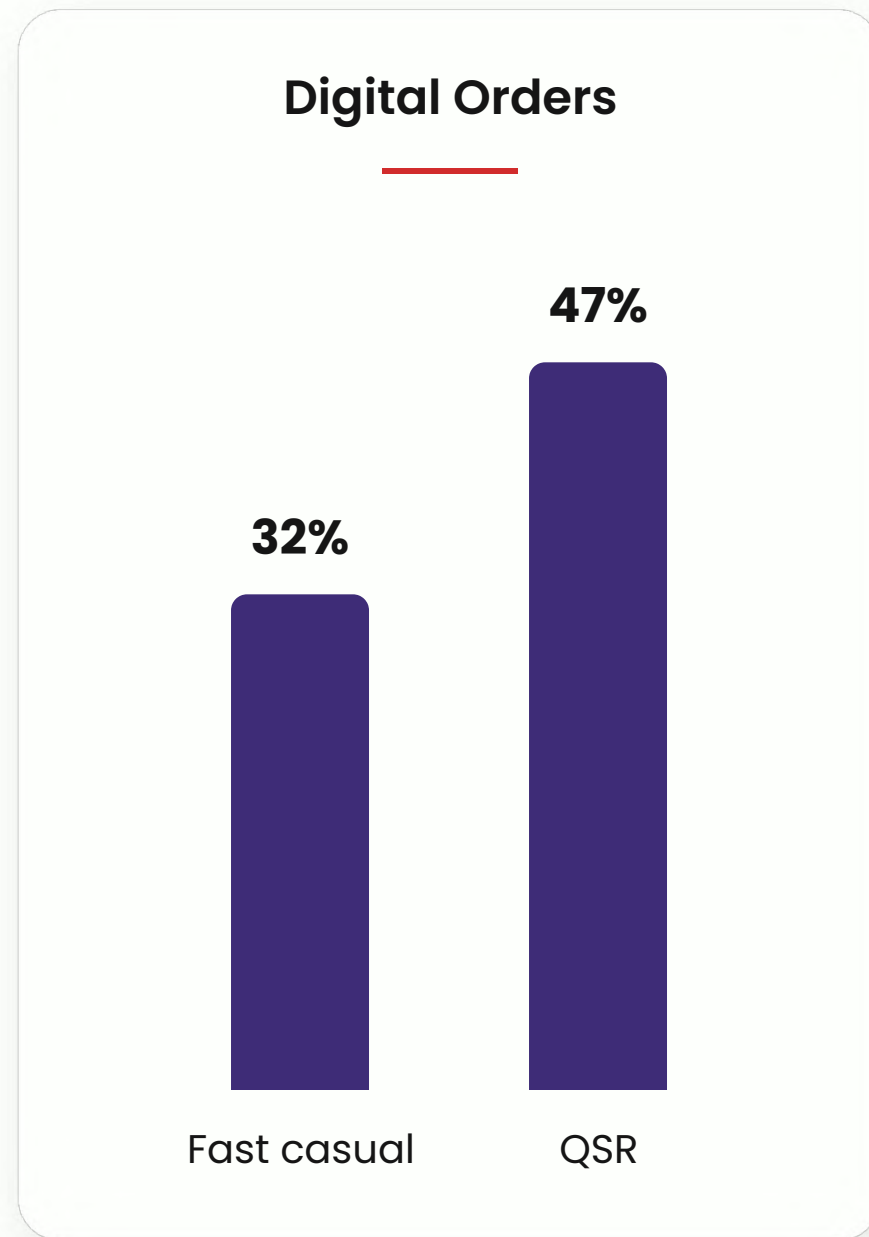
E.g. Accuracy and speed of the specified SLA- let me place the order as soon as possible and receive my order by the promised time.

**Transparency** includes visibility into menu items, ingredients and nutritional information, real-time order tracking and availability by store.

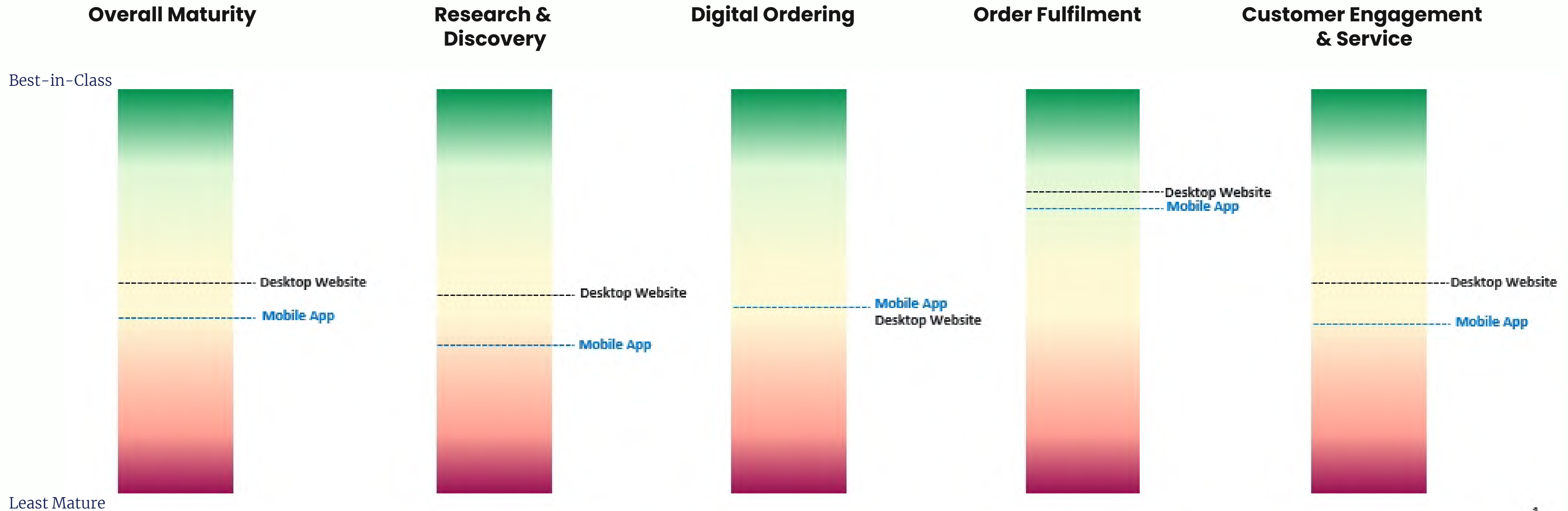
E.g. Show me what is in my food, from where it was sourced and exactly where my order is in real time.

# Digital orders account for almost a third of orders in fast casual restaurants and almost half in QSRs.

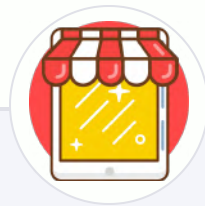
Sales by Channel



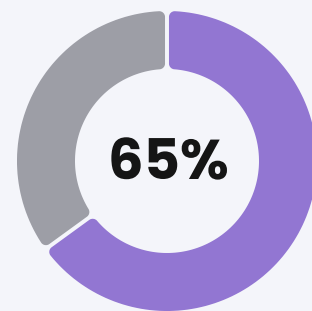
# Restaurant websites offer a better digital ordering experience compared to mobile apps, especially in research & discovery and customer service.



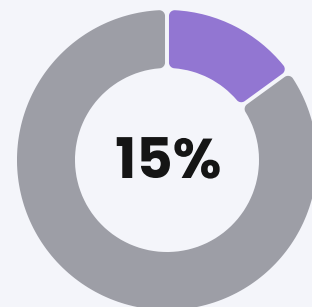
# While many digital capabilities have evolved, restaurants still have considerable progress to make to meet greater customer expectations.



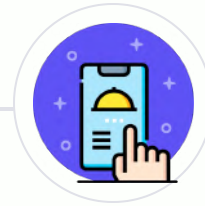
## Research & Discovery



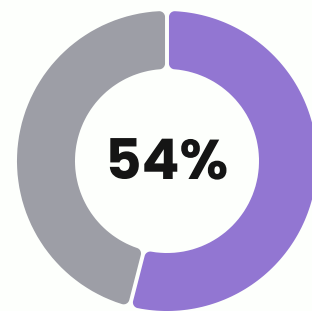
provide nutrition and allergen information for menu items



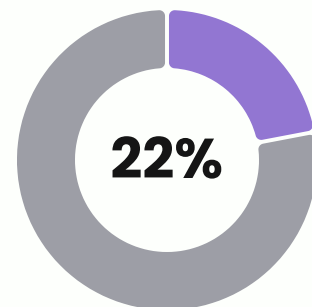
allow customers to view menu items' availability status



## Digital Ordering



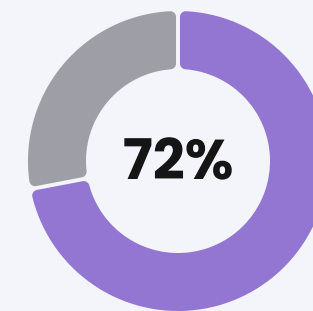
offer expedited one-step checkout



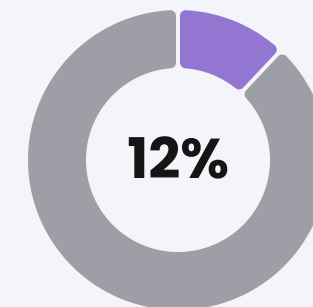
allow customers to reserve online, pay at store



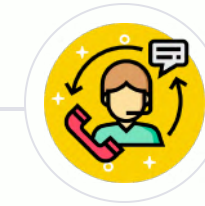
## Order Fulfillment



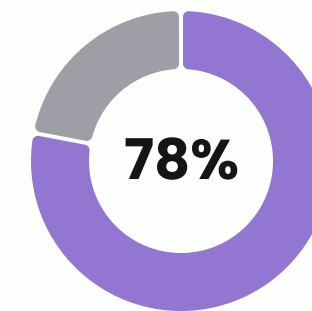
have a curbside pickup option



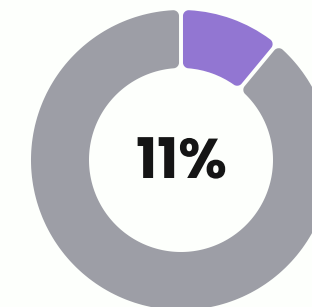
allow customers to receive a prompt for check-in for order pickup



## Customer Engagement & Service



allow customers to register and manage their loyalty membership



allow customers to provide feedback for pickup/delivery experiences





Digital Benchmarking Framework  
**Methodology & Approach**

# Incisiv's 2022 Digital Maturity Benchmark assesses top restaurants' digital channel experience and capabilities across 4 key areas.

The benchmark is comprised of the top restaurants (by annual revenue) across 4 different industry sub-segments. Each retailer's digital maturity capabilities and experience were assessed using an observational methodology.

## Digital Ordering

Order personalization, inventory visibility, payment options, tracking and delivery experience

33 attributes  
31 attributes

## Frictionless Fulfillment

Availability, speed, convenience and experience of fulfillment

14 attributes  
15 attributes

## Research & Discovery

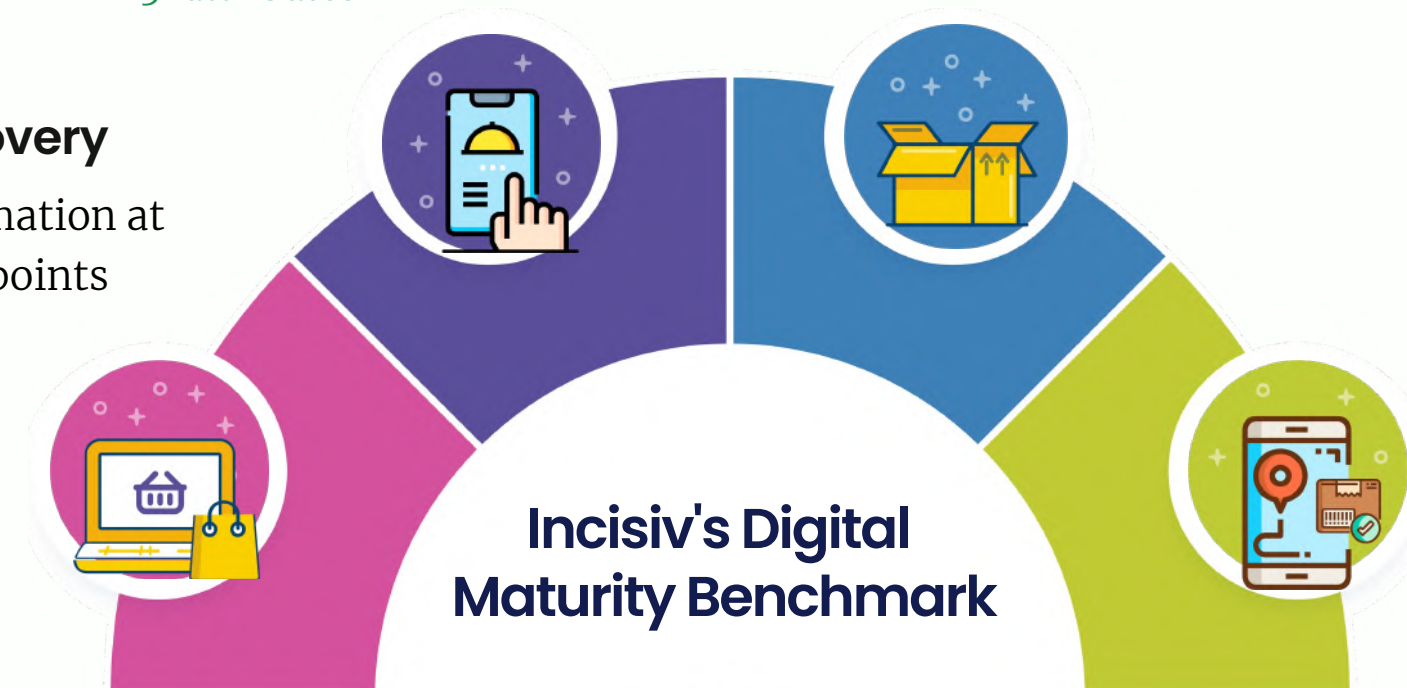
Availability of information at the crucial decision points

42 attributes  
33 attributes

## 360-Degree Service

Resolution, returns and customer assistance, post purchase

45 attributes  
39 attributes



100

brands benchmarked  
69 brands benchmarked in 2020

134

digital capabilities assessed  
118 capabilities assessed in 2020

6

segments covered: global, sandwich, chicken, burger, snack and pizza

Unless stated otherwise, all data in this report is from Incisiv's 2022 Digital Maturity Benchmark.

*Text in green indicates 2020 data*

Each assessment area includes table stakes and differentiating experiences. They are defined based on their overall level of adoption, perceived value by shoppers and impact on key performance indicators (KPIs), such as average order value (AOV), conversion and traffic.

### TABLE STAKES

Foundational capabilities required to address key shopper expectations today. The absence of these capabilities has a negative impact on digital performance KPIs.

### DIFFERENTIATING EXPERIENCES

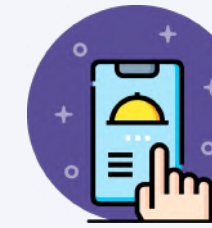
Advanced capabilities that address important emerging shopper expectations. The presence of these capabilities has a positive impact on digital performance KPIs.

## Illustrative examples of **table stakes** and **differentiating experiences**



### Research & Discovery

- Availability of nutrition, ingredients and price information for menu items
- Meal item recommendations on product and cart pages
- Availability of store-related information: operational hours, GPS and store amenities
- Promotion callouts on homepage and menu
- Inventory status callouts



### Digital Ordering

- Capability to schedule future orders
- Capability to customize order specifications
- Expedited and guest checkout options
- Visibility of favourite order on the homepage
- Expanded payment means: Apple Pay, PayPal, G Pay



### Order Fulfillment

- Fulfillment options: BOPIS, curbside, home delivery (both in-house and third-party)
- Option to track order status and delivery in real-time
- Option to provide driver notes for delivery
- Option for drive-thru and package drop-off at preferred PO box location
- Capability to receive a check-in prompt for order pickup



### 360-Degree Service

- Helpdesk: FAQs, email/contact form
- Account settings: View order history, save multiple addresses, payment details and bookmark favourite stores
- Loyalty program registration and account management
- Option to purchase physical and e-gift cards
- Availability of live chat, virtual assistant and telephonic customer support

# Digital Maturity Benchmark: Rating Categories.



Laggards offer a severely lacking digital maturity, missing even some basic table-stakes functionality.

Adoption of table-stakes capabilities: Medium  
Adoption of differentiators: Low



Followers offer a basic digital maturity, addressing most table-stake capabilities. Their experiences lack depth, and are light on adoption of differentiated capabilities.

Adoption of table-stakes capabilities: Medium-High  
Adoption of differentiators: Low



Challengers offer a seamless digital maturity built on a solid foundation of capabilities. They offer some differentiated experiences, but lack the depth and coverage of leaders.

Adoption of table-stake capabilities: High  
Adoption of differentiators: Medium



Leaders offer the richest maturity within and across retail segments. They lead in adoption of differentiated experiences, and are functionally mature across most assessment areas.

Adoption of table-stakes capabilities: High  
Adoption of differentiators: High

Digital maturity is highly correlated with revenue growth. Leaders' annual revenue growth is 5x higher than laggards'.

Annual Revenue Growth 2020





## Global Leaders – Overall.

Incisiv recognizes these 27 brands as leaders in the overall restaurant customer experience.

They have a strong foundation of table-stakes capabilities along with leadership in the adoption of differentiating capabilities.

The entire leaderboard is available at the end of the report.

Retailers rated as leaders in digital shopping experience, in alphabetical order.





01 | Research & Discovery

# Ease of Search & Navigation

## RESEARCH & DISCOVERY: OVERVIEW

# A comprehensive food menu, clear promotion callouts and health-related information are imperative for digital food ordering channels

With a rise in digital food ordering, restaurants now have the opportunity to curate the online ordering experience and build customer loyalty.

70% of customers prefer to order directly from a restaurant, compelling brands to ensure easy accessibility and transparency of their menus, advertisements and store information.

## WHY IT MATTERS

Most consumers are looking for seamless online food ordering. By providing consumers with intuitive search features, clear navigation callouts and extensive filters, restaurants can make the discovery process easier and enhance the user experience.

### 65% of consumers

consider the menu as the major deciding factor for visiting a restaurant.

### 63% of consumers

consider online discounts and promotions available through mobile as an important factor for ordering ahead.

### Up to 20% of consumers

leave an online order if they have an unclear menu that raises questions unanswered by the website or app.

## WHAT WE ASSESS

This section evaluates the availability of the search function, ease of navigation and availability of information at important customer decision points in the shopping journey. The attributes assessed, if present, would greatly improve customer engagement and conversion.

### 61 total attributes assessed, including:

- Availability of a comprehensive, detailed menu for product selection
- Availability of nuanced filters around product availability, allergens and calories, as well as dietary restrictions
- Ease of finding products: relevant product tags, new launch highlights and promotions
- Inventory status callouts in the menu
- Availability of store-related information, such as reviews, operational hours and amenities



**While QSRs lead the segment in terms of the availability of information, fast casual restaurants have more mature personalization functionality.**

Driven by the nature of their product and USP, QSRs' digital platforms have a higher focus on deals and promotions.

Contrarily, Fast Casual restaurants exhibited more comprehensive menu options, along with recommendations and cross-selling opportunities.

**Fast Casuals**



**Quick Service Restaurants**

<b>34%</b>		Offers & promotions on homepage Industry average adoption: 43%		<b>52%</b>
<b>43%</b>		Availability of detailed store information Industry average adoption: 56%		<b>68%</b>
<b>17%</b>		Availability of a section for limited-time specials Industry average adoption: 23%		<b>28%</b>
<b>77%</b>		View meal-item recommendations Industry average adoption: 69%		<b>62%</b>



## Global Leaders in Research & Discovery

Incisiv recognizes these 25 brands as leaders in research and discovery.

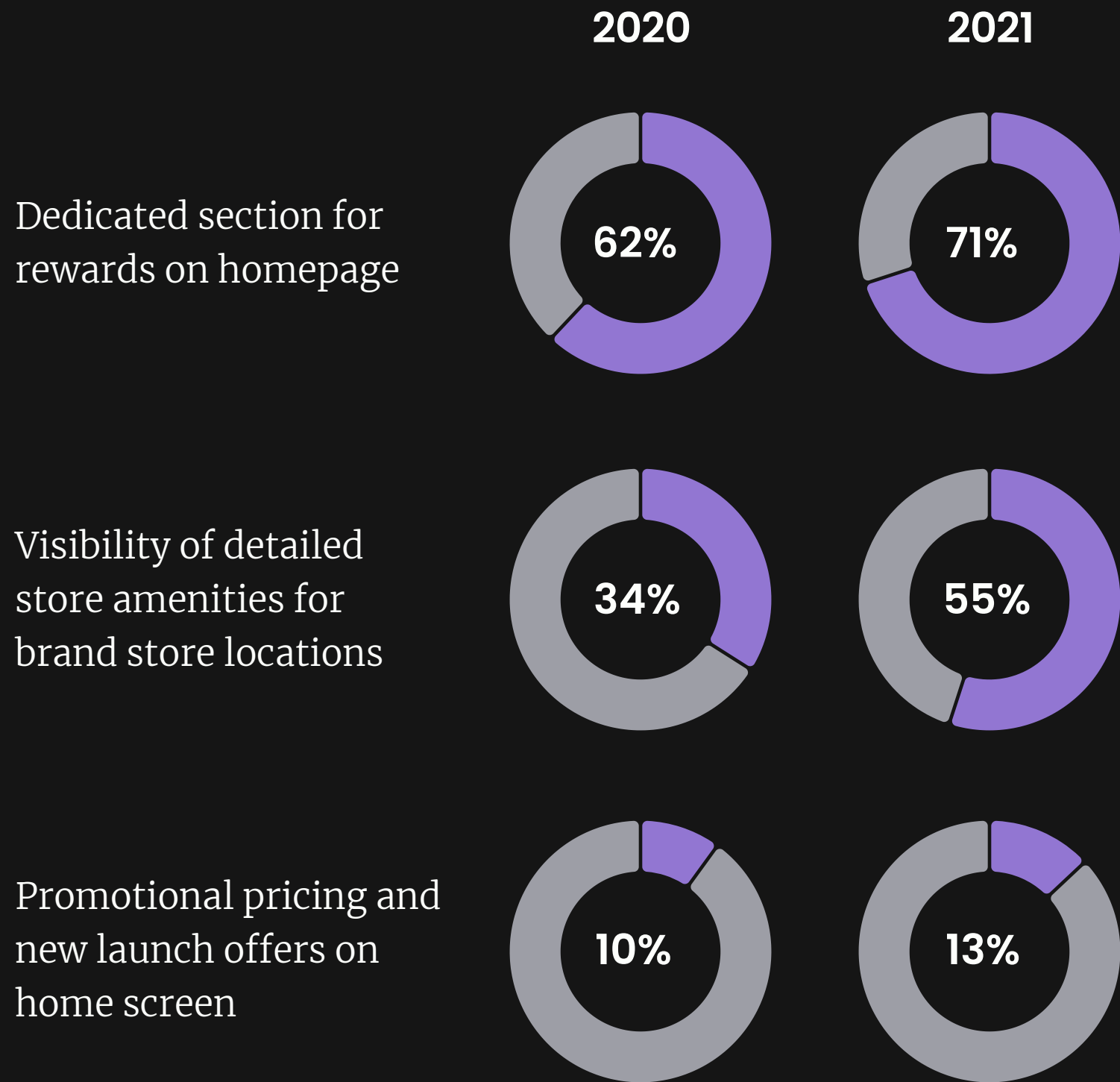
They have a strong foundation of table-stakes capabilities along with leadership in the adoption of differentiating capabilities for research and discovery.

The entire leaderboard is available at the end of the report.

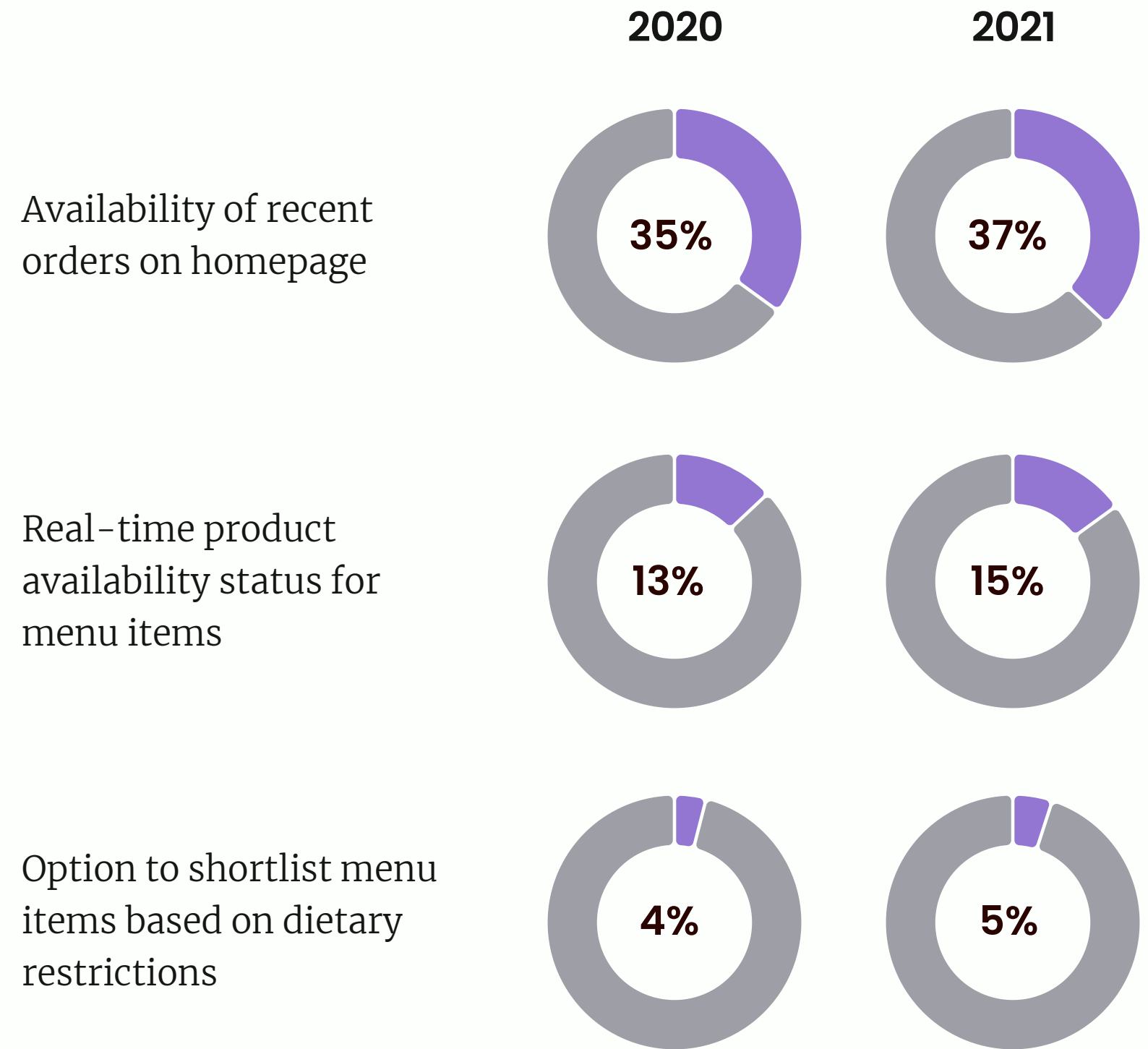
Retailers rated as leaders in Research & Discovery, in alphabetical order.



## Areas of high growth: Promotion visibility and store details



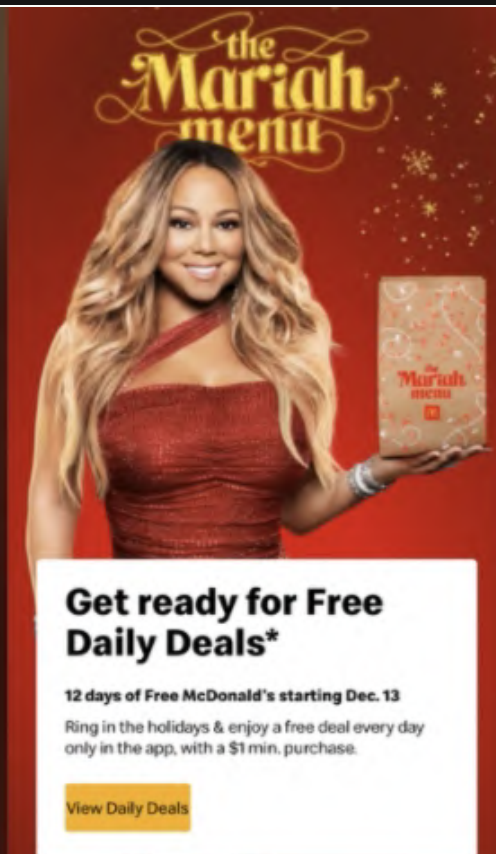
## Areas of low growth: Transparency of product and order information



## Seasonal promotions that are hard to miss

The lure of promotions and offers has always been a big pull factor for today's shoppers. 47% of shoppers actively hunt for promotions and discounts directly from restaurants. 30% of restaurant retailers already offer promotional pop-ups on their mobile apps.

McDonald's rolled out the Christmas special "Mariah Menu" pop-up in its mobile app. It enables shoppers to select free items each day through Christmas Eve with a minimum \$1 purchase on the app.



## Store availability status for menu items

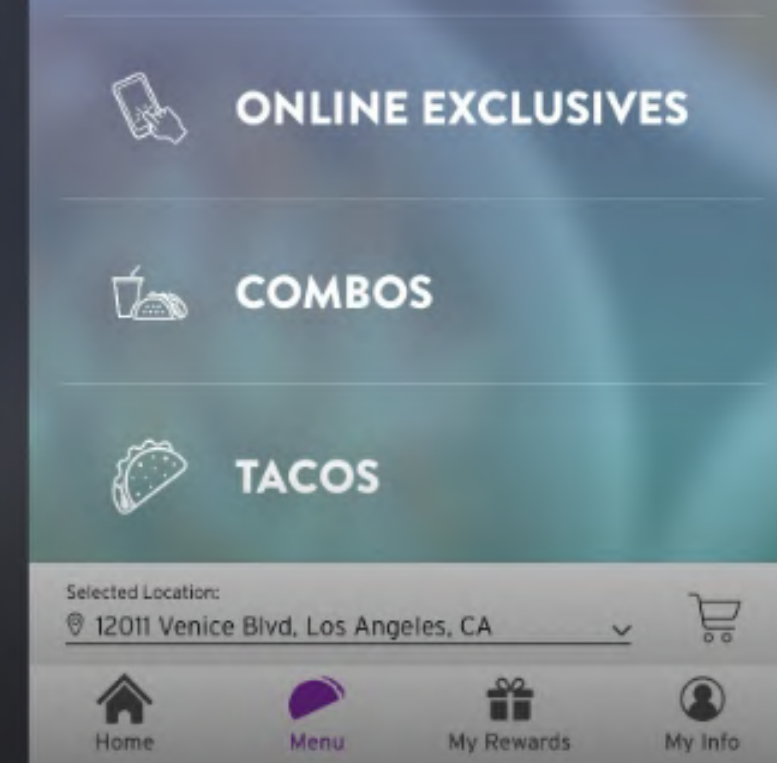
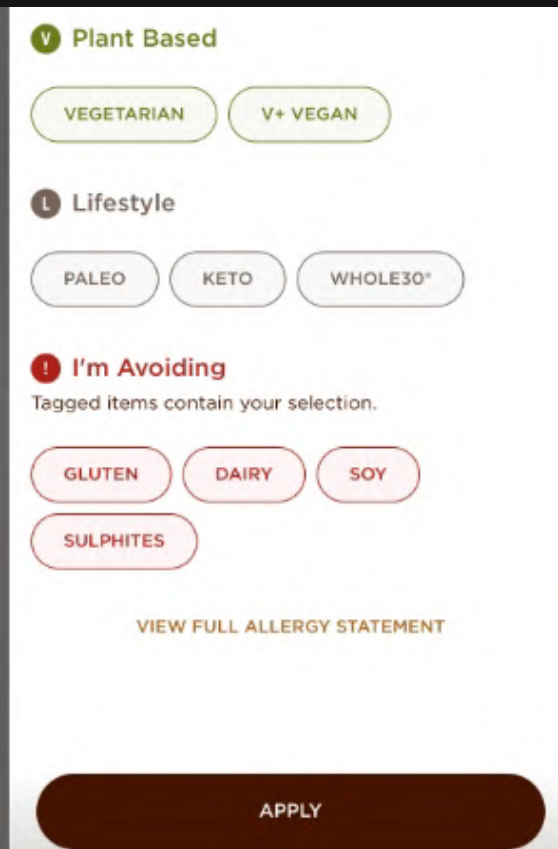
Given that almost 90% of online restaurant searches result in final sales, the essential process of stockkeeping and flagging low inventory holds great value for shoppers. However, among current industry numbers, only 16% of the brands call attention to the item availability status.

Starbucks provides customers visibility on the availability of menu items for selected locations with the callouts "Not sold at this store" and "Sold out at this store." These messages spur shoppers to either choose a different location or purchase another item.

## Shortlist products based on lifestyle preferences

With healthier food choices gaining momentum during the pandemic, 64% of shoppers now prefer healthier menu options, and 43% look for nutritional facts. Shoppers seek restaurants that cater to their food allergies and dietary restrictions. Only 5% of brands currently help shoppers to navigate through products according to their dietary preferences.

Chipotle offers shoppers options to segregate the menu in a manner that suits their lifestyle choices. Even useful allergen filters enable shoppers to make an informed decision.



## Online-exclusive menu items

75% of shoppers prefer to order directly from the restaurant, primarily those with digital ordering platforms. To attract more customers, restaurants need to strengthen their online presence and deliver a distinct digital experience, especially in terms of menu offerings and design. As of now, only 5% of brands have online-exclusive offerings.

Taco Bell's mobile app has menu items that specifically target the online shopper. Curated items reflect current demand and preferences of digitally-savvy shoppers.



02 | Digital Ordering

# Seamless Ordering & Checkout

## Convenience drives behavior and a smooth online ordering experience tops the list

Shoppers increasingly seek convenience and comfort in every aspect of their digital journey. In response, brands have developed capabilities to cater to a diverse pool of shopping preferences.

While brands have maximized the availability of order modifications and allowed customers to schedule future orders as desired, they still have opportunities to add flexible mobile payment methods, such as Apple Pay, PayPal and Google Pay.

### WHY IT MATTERS

Restaurants are going digital as shoppers' omnichannel expectations rise. Now that consumers have come to expect speed and convenience, brands need to focus on offering quicker mobile payment platforms, as well as customizing the online experience, including allowing customers to save their favorite orders.

**41% of consumers**

would purchase a DIY meal kit from their favourite restaurant

**40% of restaurants**

have adopted contactless or mobile payment methods during the pandemic

**73% of consumers**

look for a customized online ordering experience

### WHAT WE ASSESS

This section evaluates the checkout process and capabilities, ease of ordering, as well as the different payment methods offered.

**33 total attributes assessed, including:**

- Option to place orders or schedule orders for a future date
- Seamless checkout process
- Availability of shared cart and bulk ordering
- Different payment options offered to shoppers

**Fast Casual restaurants provide a more comprehensive and nuanced ordering platform compared to QSRs, which primarily focuses on speed and convenience.**

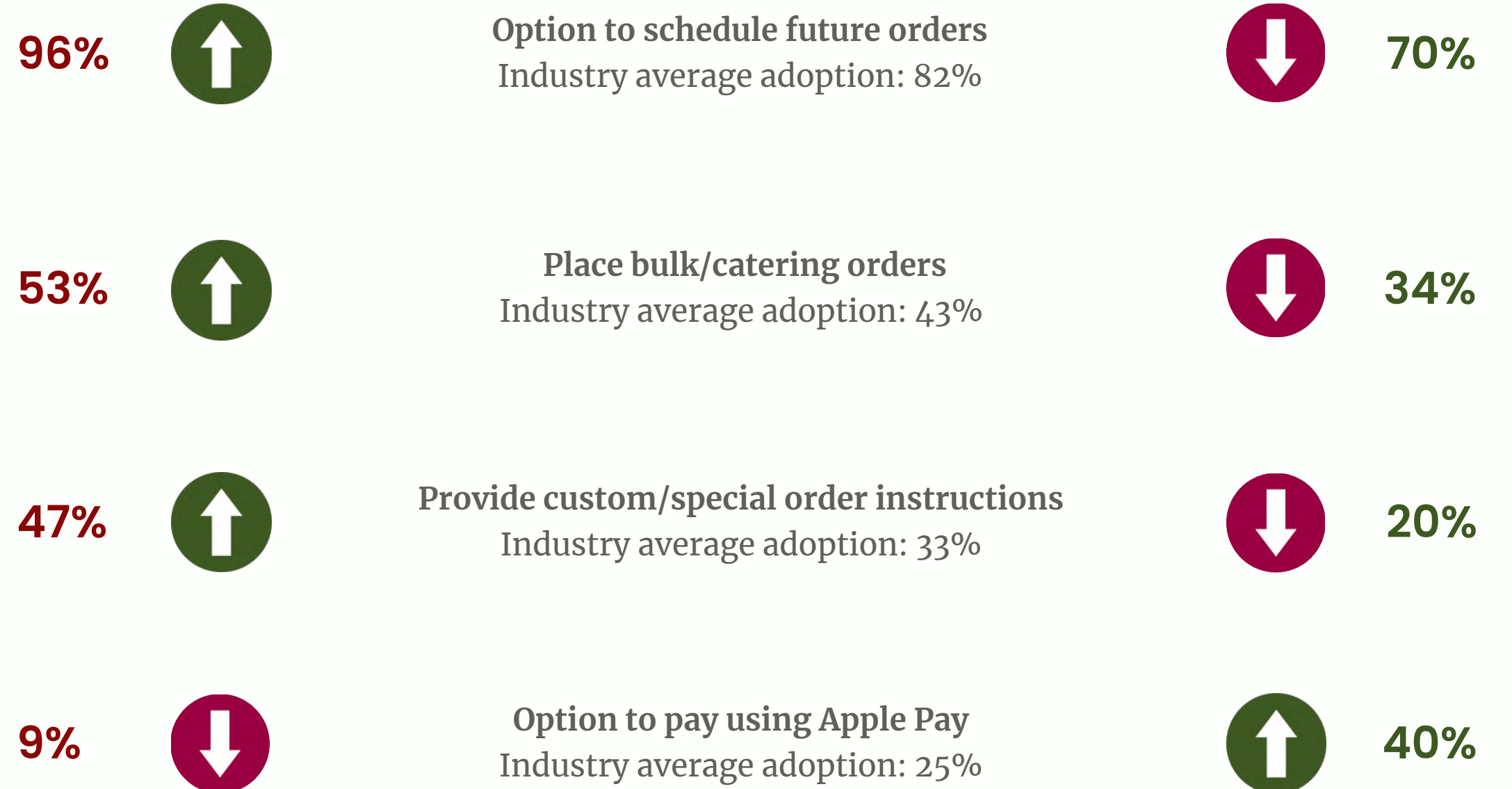
Fast Casual restaurants have matured considerably and now have strong digital ordering capabilities with regards to order customization and fulfillment.

While QSRs lag in customization, they have advanced checkout features, including speed of checkout and availability of new payment methods, such as Apple Pay and Google Pay.

**Fast Casuals**



**Quick Service Restaurants**







## Global Leaders in Digital Ordering

Incisiv recognizes these 27 brands as leaders in digital ordering.

They have a strong foundation of table-stake capabilities, along with leadership in the adoption of differentiating capabilities for digital ordering.

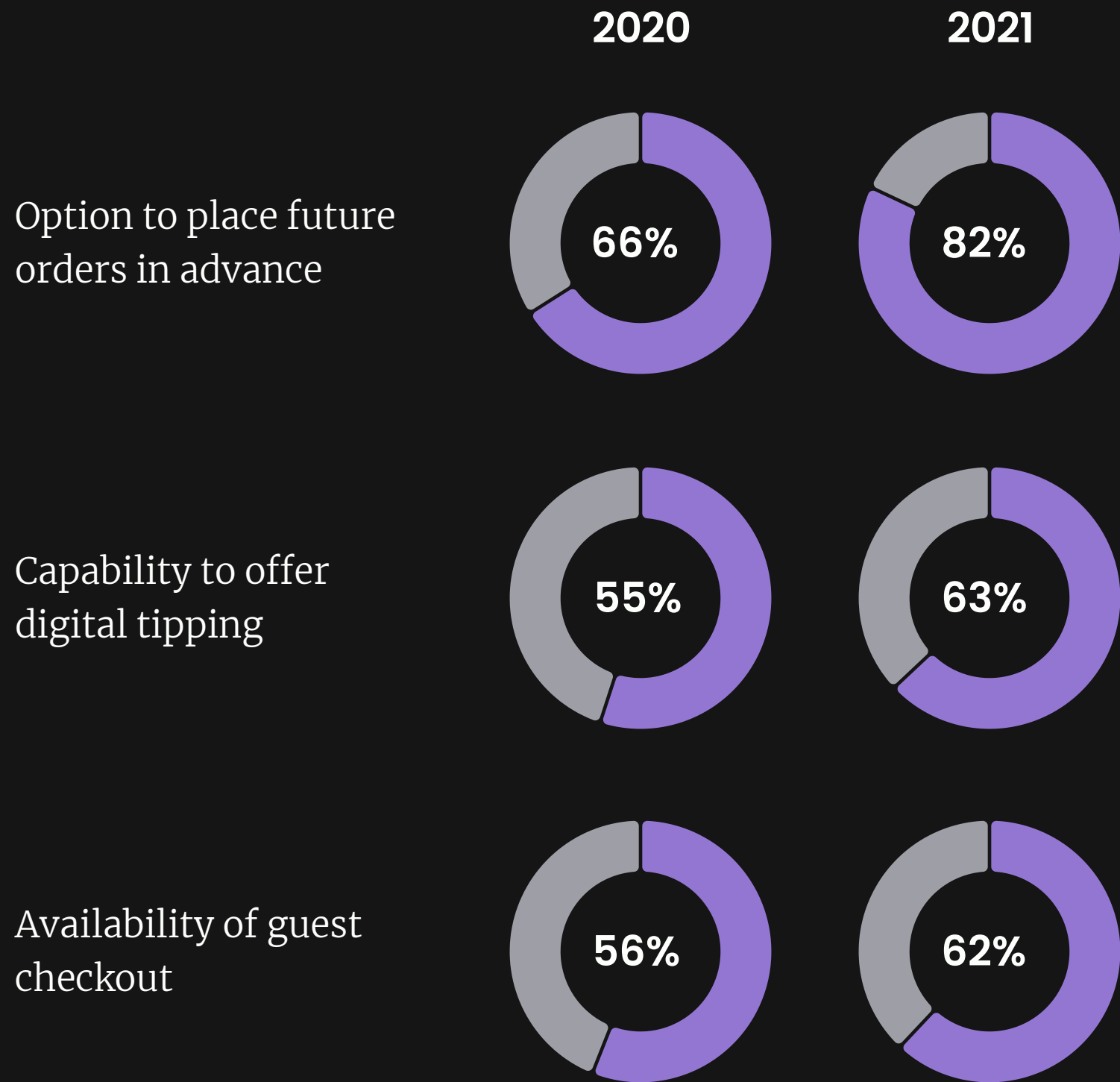
The entire leaderboard is available at the end of the report.

Incisiv's 2022 Digital Maturity Benchmark

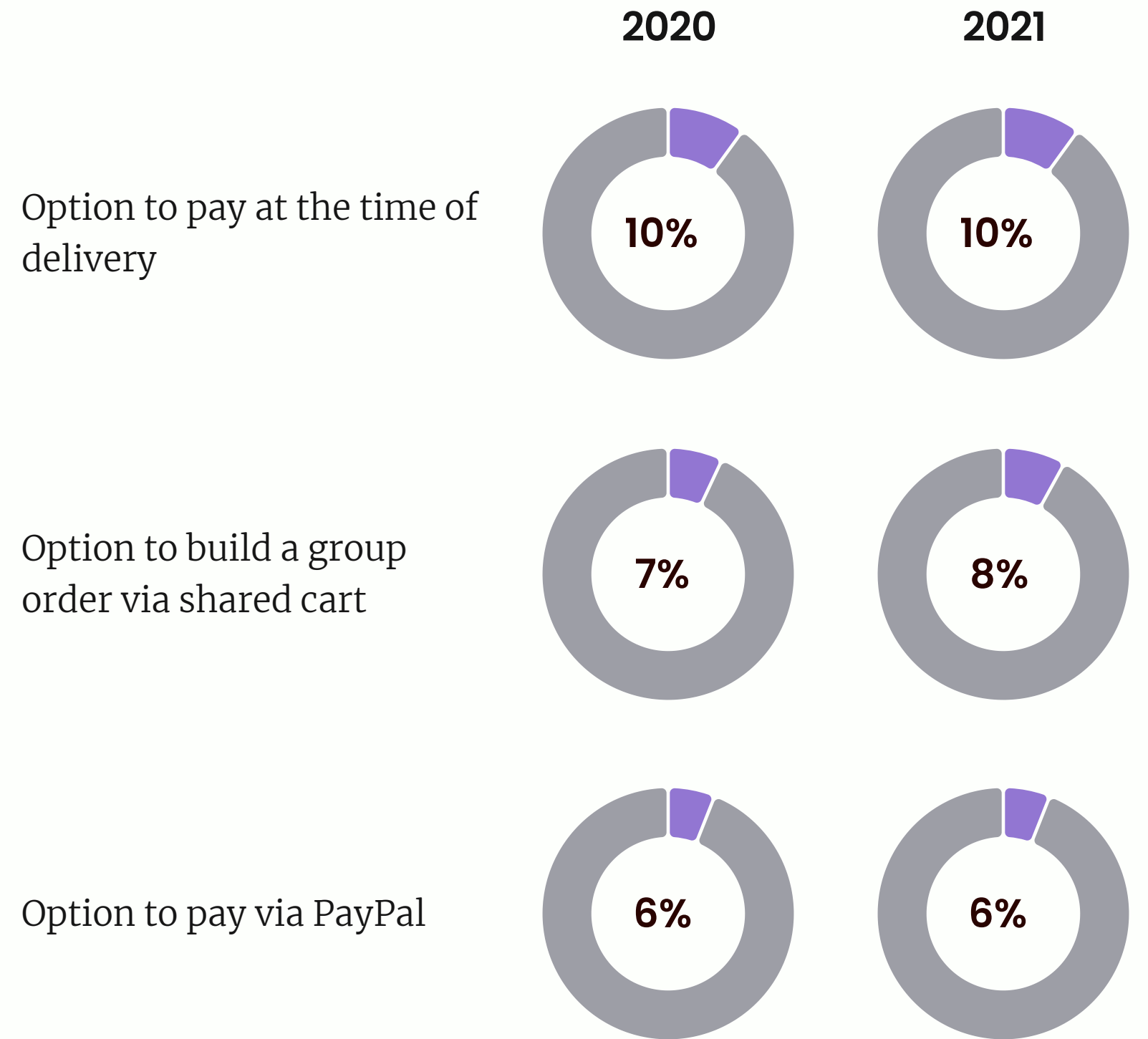
Retailers rated as leaders in Digital Ordering, in alphabetical order.



## Areas of high growth: Seamless checkout



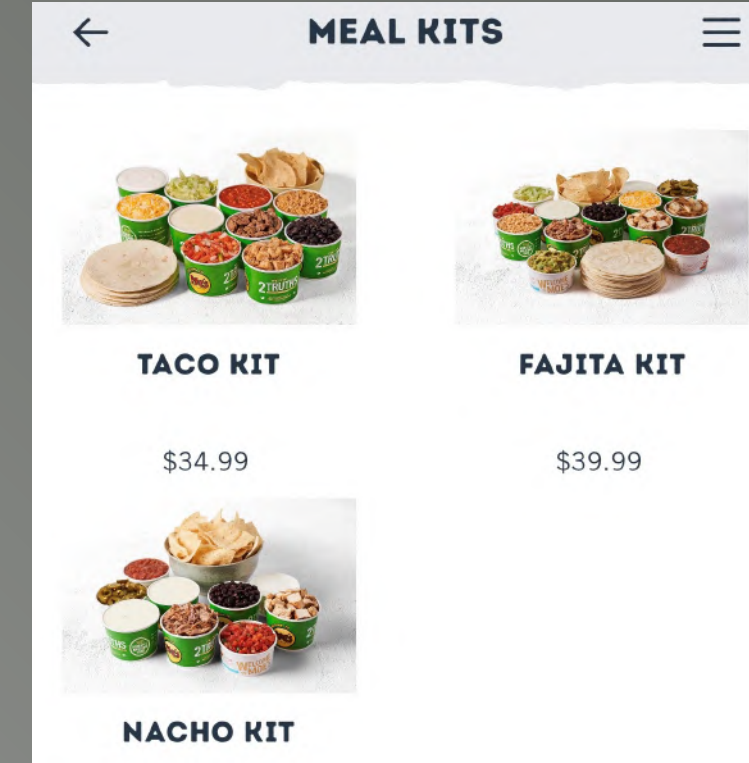
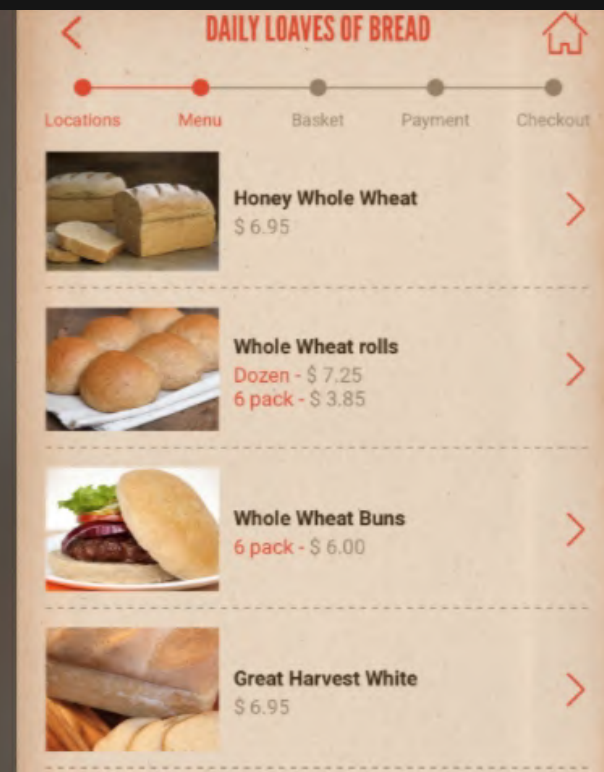
## Areas of low growth: Advance ordering and payment options



## Groceries as an add-on purchase

Since 2020, as the shopping landscape has undergone an overhaul, businesses have innovated with their revenue models to boost their relevance, convenience and share of wallet. As shopping goes increasingly digital, 70% of millennials would buy grocery items if they were available at their preferred restaurants. Currently, 14% of fast casual restaurants sell associated grocery items (bread, marinated meats, etc).

Great Harvest offers a variety of grocery items like prepackaged oatmeal, bread and ready-to-eat dog treats.



## DIY meal kits available for ordering

As a growing number of consumers now value a healthy lifestyle, meal kits are perfect options since they come with premeasured ingredients and in smaller sizes. Given the option, more than 50% of shoppers would purchase meal kits from their preferred restaurants. Currently, only 14% of restaurants have evolved to include meal kits as an online ordering option.

Moe's offers customizable meal kit options for customers to easily prepare at home.



03 | Order Fulfillment

# Convenience of Placing & Receiving Orders

## Expanding fulfillment options and optimizing the customer experience have been restaurants' top priorities over the past year.

With on-premise dining in decline, restaurants have to evolve to offer sustainable and seamless fulfillment channels.

While adoption of third-party delivery partnerships has increased considerably since before the pandemic, more retailers are enhancing their in-house fulfillment channels.

### Why It Matters

Two years into the pandemic, restaurants continue to struggle with managing both dine-in and delivery while meeting rising customer expectations. Flexible fulfillment options, safety and convenience features would prove highly lucrative factors that help restaurants achieve a seamless digital experience.

**37% of consumers** prefer drive-throughs while ordering from restaurants

**3 out of 5 consumers** expect the same quality of freshness in delivery and takeout as they do in the dining room

**57% of consumers** prefer to use a restaurant's own mobile app compared to third-party apps to place an order

### What We Assess

This section evaluates the in-house and third-party platforms for online ordering, and provides insights into different modes of delivery and pick-up capabilities, especially social distancing friendly norms.

**14 total attributes assessed, including:**

- Multiple options for fulfillment, including BOPIS, curbside, drive-thru, and contactless delivery
- Capability to schedule future orders for pickup
- Advanced functionalities for smooth fulfillment: dedicated pickup counter, package drop-off at preferred PO box location, driver notes
- In-house and third-party delivery capabilities


# Fast casuals outpace quick service restaurants in the adoption of fulfillment capabilities and experience.

Driven by the "quick" nature of QSRs, they were the pioneers of the drive-thru concept, which has gained prominence in recent years. 66% of QSRs offer drive-thru options, 3x more than fast casual restaurants.

Apart from low adoption of drive-thrus, fast casuals have strong fulfillment capabilities including high adoption of curbside pickup, in-house delivery, and order personalization.

## Fast Casuals

85% 

21% 

72% 

74% 



## Quick Service Restaurants

Curbside pickup  
Industry average adoption: 72%

 60%

Drive-thru  
Industry average adoption: 44%

 66%

Avilability of in-house delivery  
Industry average adoption: 62%

 52%

Option to provide delivery notes  
Industry average adoption: 60%

 47%



## Global Leaders in Frictionless Fulfillment

Incisiv recognizes these 26 brands as leaders in frictionless fulfillment.

They have a strong foundation of table-stake capabilities, along with leadership in the adoption of differentiating capabilities for frictionless fulfillment.

The entire leaderboard is available at the end of the report.

Incisiv's 2022 Digital Maturity Benchmark

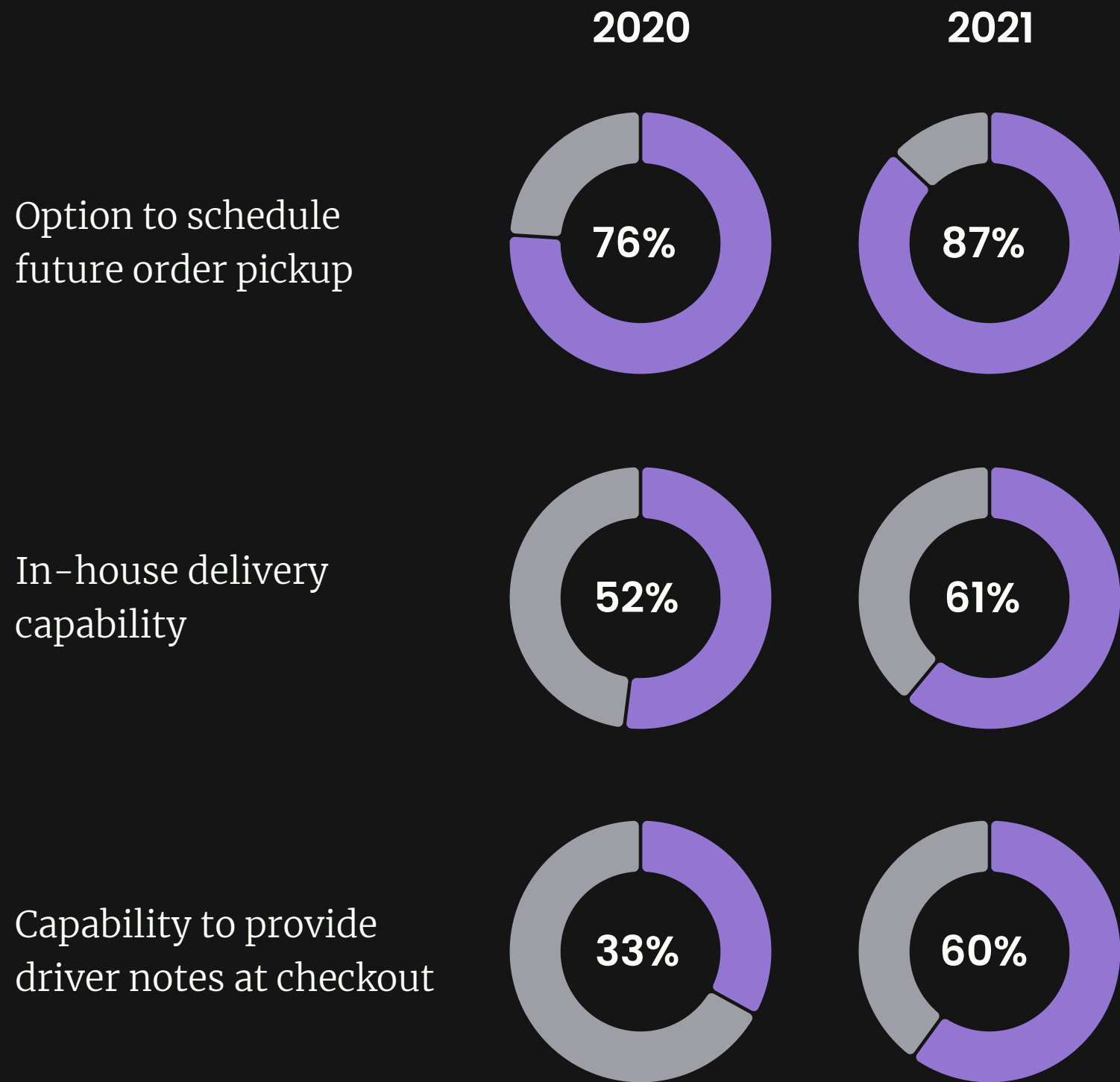
Retailers rated as leaders in Frictionless Fulfillment, in alphabetical order.



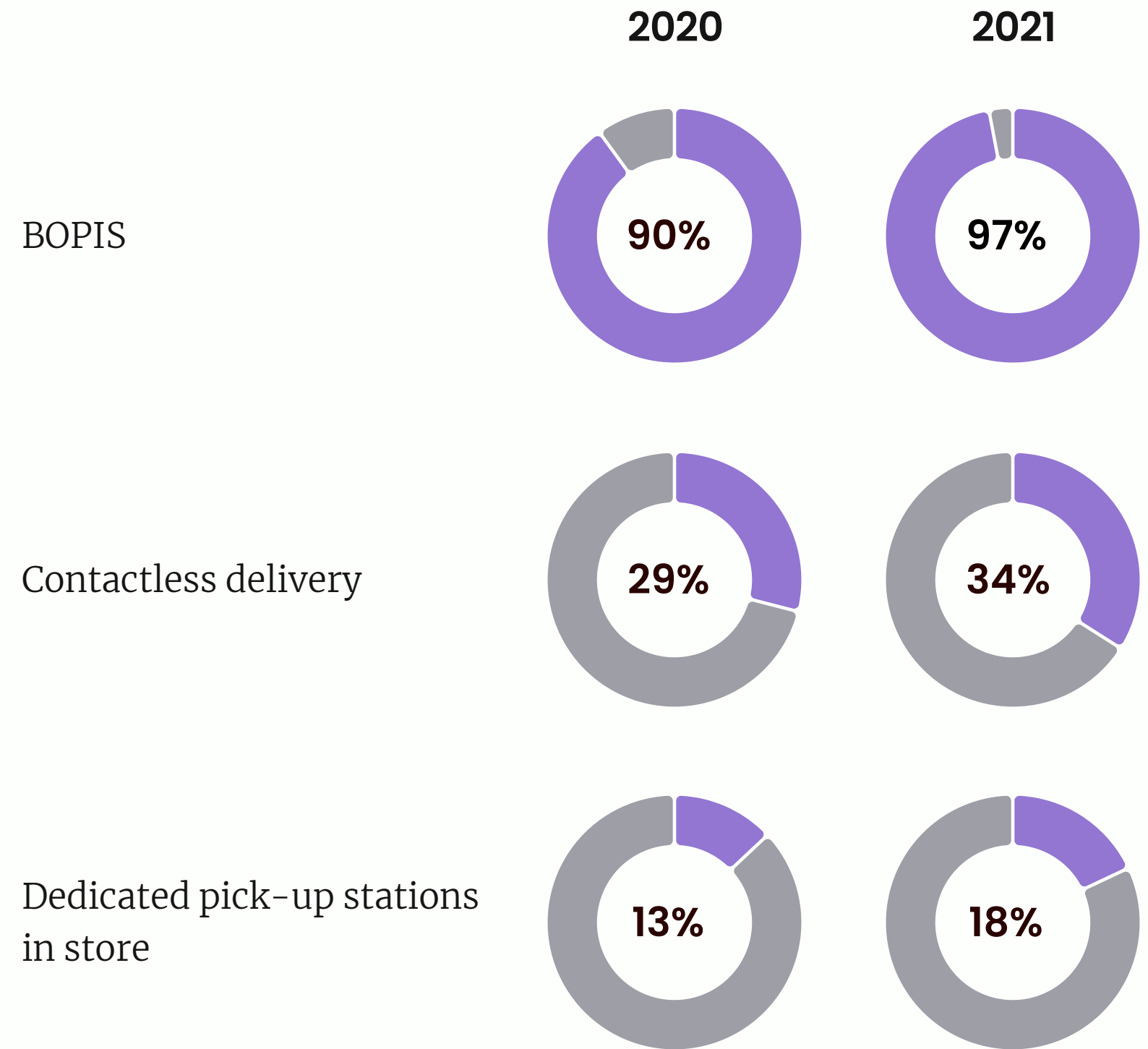
CAVA



## Areas of high growth: Flexibility in fulfillment time, channel and customization



## Areas of moderate growth: Nuanced and extensive execution of orders





## Contactless delivery options to minimize personal interactions

While the threat of the pandemic has stabilized, shoppers will still prefer to use contactless options. This can build brand trust by creating a sense of responsibility for health and safety. Currently, only 30% of restaurants offer 'contactless delivery' options and only 8% of restaurants explicitly offer drop-off options (in a mailbox, garage).

The Sweetgreens app has multiple delivery options, including drop-off at preferred location and notes to enter locker security codes.

**Add address** (close icon)

Add address

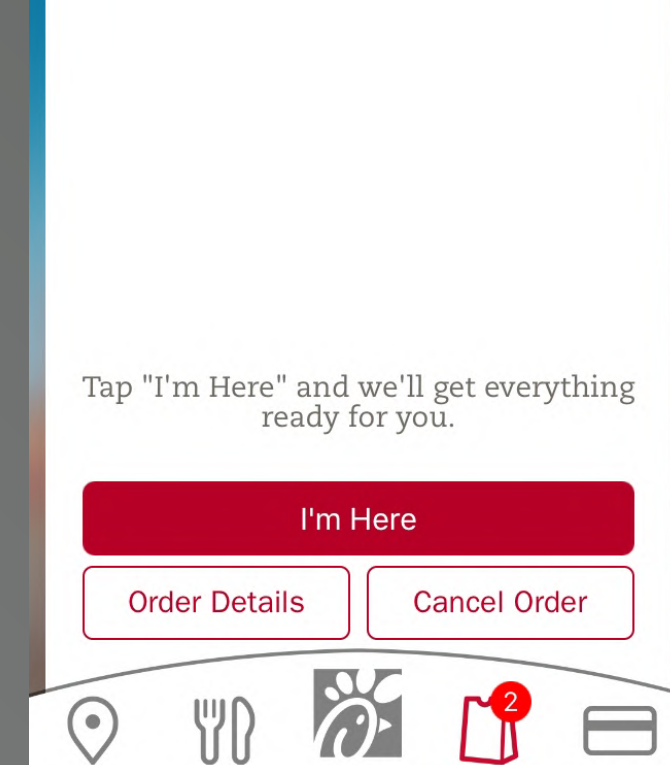
Street number and name  
New York Ave NW, Washington, DC

Apt number, suite, company

Drop-off

Meet at door   Meet outside   Leave at door

Delivery Notes 0/128  
Enter courier notes, e.g. security code, building details...



## Customers update restaurants with arrival/check-in for order pickup

Shoppers who have to wait for less than 2 minutes to pick up an order are 4x more likely to return. Sending arrival information to restaurants increases customer satisfaction, as shoppers feel that they receive hot and freshly prepared food. Currently, only 12% of restaurants offer this functionality.

Chick-fil-A's app allows users to inform the restaurant before order pick-up.

## FRICITIONLESS FULFILLMENT: SPOTLIGHT

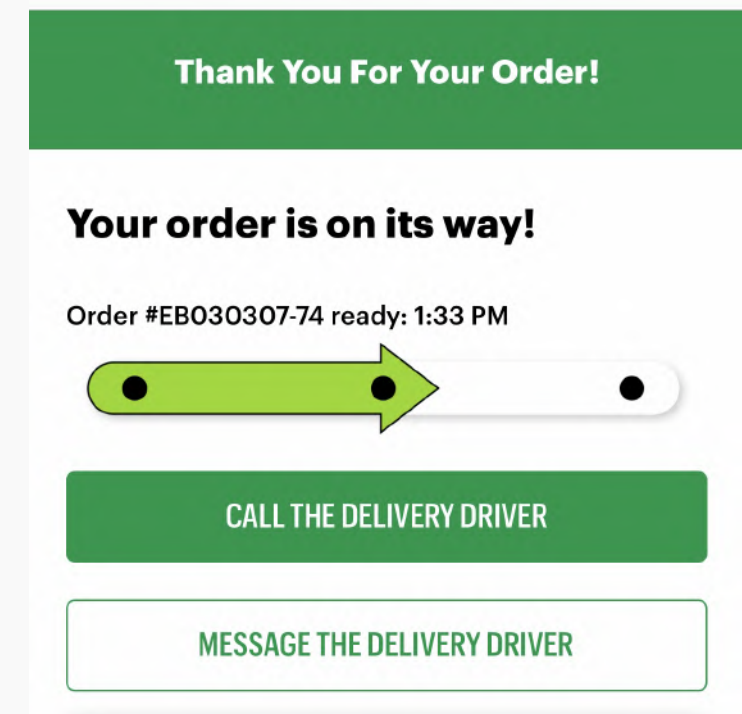
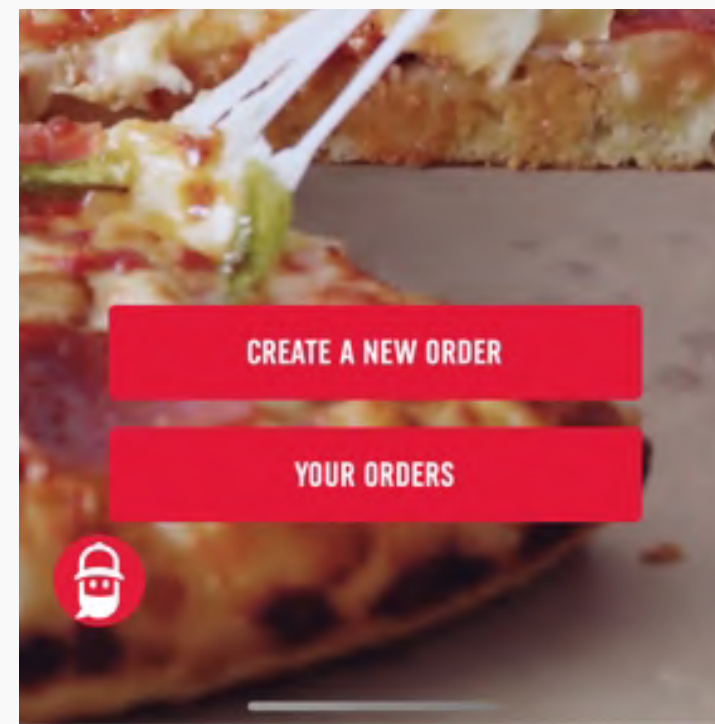
# Creating an optimized post-purchase cycle through effective communication and personalized delivery experience.

Once the order gets placed, the post-purchase experience can either strengthen or lessen customer loyalty and retention.

While restaurants exhibited high maturity levels for order notifications and delivery experience, they face new opportunities to improve post-purchase customer communication and support.

## 4 in 5 customers

have switched brands due to poor post-purchase communications



## Display of recent/previous orders on the homepage of the app.

Easy access to previous orders allows customers to order faster and assists them with placing future orders, thereby resulting in higher conversion rates. 59% of restaurants currently have a section dedicated to customers' recent orders on the homepage.

Domino's has a section on its app homepage for previous customer orders and the option to create a new order.

## Option to call/message the delivery person after placing the order.

86% of customers are likely to purchase again from brands that offer a great post-purchase experience. The ability to connect with the order delivery person enhances the post-purchase experience. On average, 62% of brands provide the option to call or message the delivery person.

Subway lets customers call or message the delivery driver after placing the order.



04 | Customer Engagement & Service

# Customer Satisfaction & Issue Resolution

## Holistic customer experience: from providing resolutions to personalization

Customer service has evolved from resolving grievances to ensuring customer satisfaction and brand loyalty.

The pandemic has given restaurant brands a renewed focus on customer engagement. Personalized offers and loyalty programs act as motivators, ensuring repeat visits and brand stickiness.

46% of consumers say that earning reward points makes them revisit mobile apps.

### WHY IT MATTERS

As the pandemic limits physical interaction, customer engagement and satisfaction are now of utmost importance. Consumer expectations have evolved from wanting to be heard to wanting a personalized experience.

**57% of consumers**  
would spend more with restaurants that offer a loyalty program

**63% of consumers**  
say that discounts and promotions are important to them

**35% of consumers**  
are influenced by online reviews and feedback while choosing a restaurant

### WHAT WE ASSESS

This section evaluates all the aspects of customer service: from account management to engagement initiatives to a 360-degree help desk.

**45 total attributes assessed, including:**

- Capability to create a personal profile and manage address details, cards and notification preferences
- Availability of clubs and loyalty programs, plus promotions and coupons
- Option to purchase physical and e-gift cards
- Availability of self-help section and live chat
- Option to provide feedback about the website/app experience

# Fast casuals and quick service restaurants are on equal footing when it comes to providing a good customer experience.

The onset of the pandemic made customer engagement all the more vital for restaurant brands. The focus now is on providing a more personalized and digital experience.

Fast casuals have displayed a strong adoption rate for customer engagement capabilities, whereas quick service restaurants are ahead in providing seamless customer service.

## Fast Casuals

83% 


81% 

17% 

60% 



## Quick Service Restaurants

 74%

 58%

 44%

 74%

Option to sign up for loyalty programs  
Industry average adoption: 78%

Option to save multiple addresses  
Industry average adoption: 69%

Availability of telephonic customer care  
Industry average adoption: 31%

Option to manage notification preferences  
Industry average adoption: 67%



Below Industry Average



Above Industry Average



## Global leaders in Customer Engagement & Service

Incisiv recognizes these 24 brands as leaders in customer engagement & service.

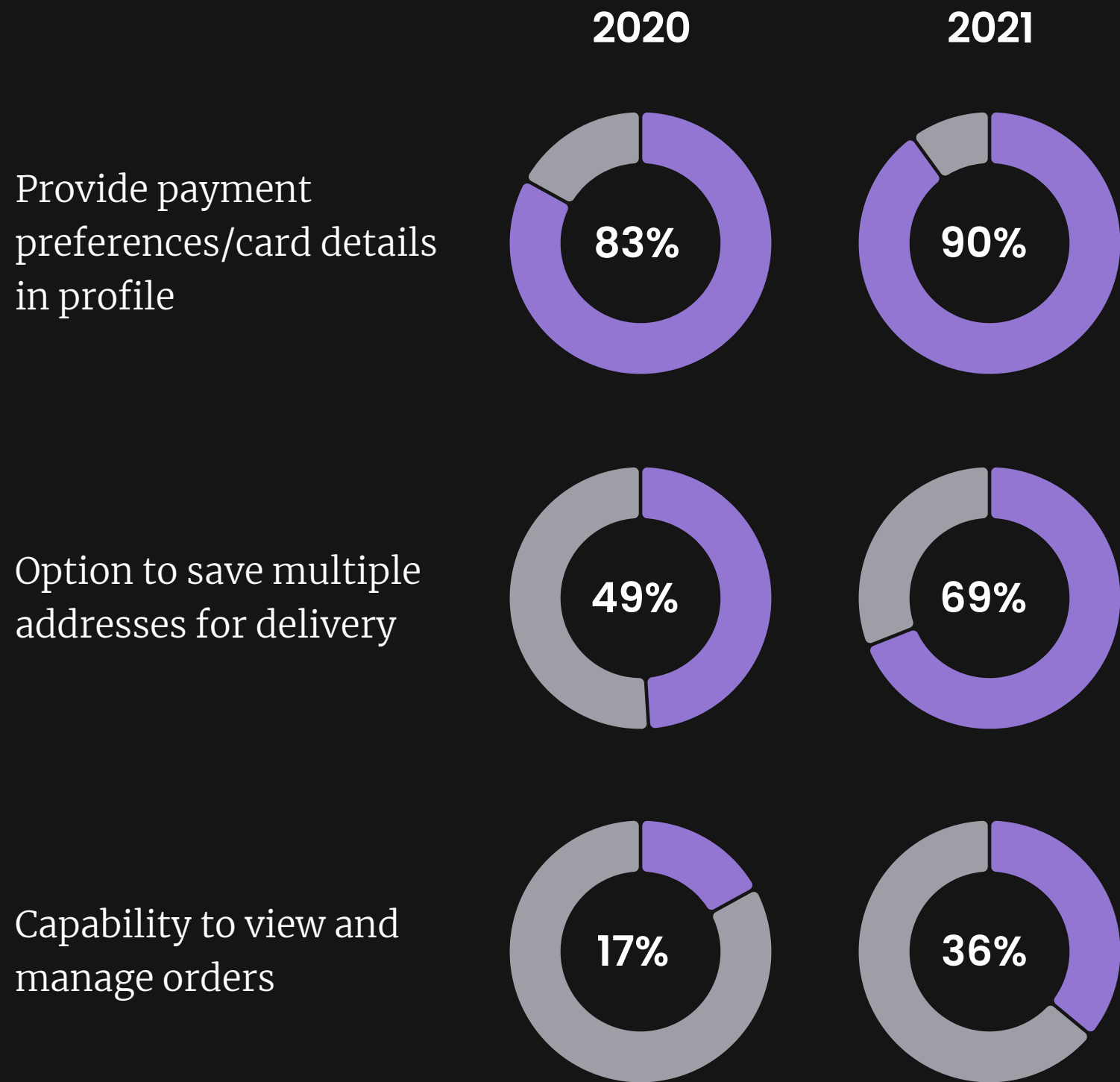
They have a strong foundation of table-stake capabilities, along with leadership in the adoption of differentiating capabilities for customer engagement.

The entire leaderboard is available at the end of the report.

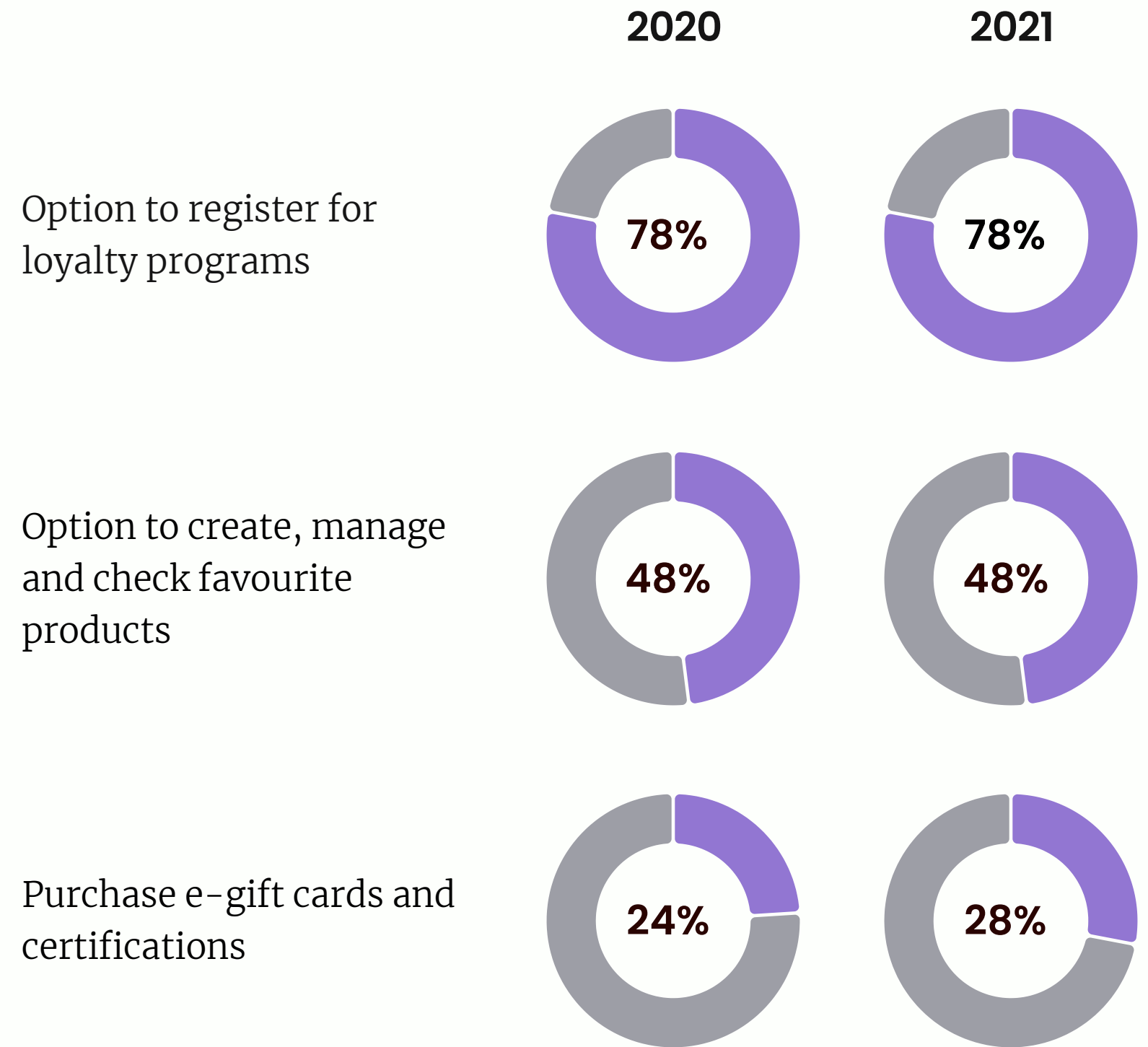
Retailers rated as leaders in Customer Engagement & Service, in alphabetical order.



## Areas of high growth: New features for account management



## Areas of moderate growth: Personalization and engagement



CUSTOMER ENGAGEMENT: SPOTLIGHT

## Transparency of sustainable food packaging and food safety initiatives

77% of shoppers consider food safety a priority. They are now demanding complete supply chain transparency and information on food sourcing and hygiene. Only 4% of restaurant apps provide information on safety and hygiene levels of food packaging, and only 7% offer information on sustainable, eco-friendly packaging.

Noodles & Company is one such brand that provides information on food sourcing, hygiene and packaging.

### OUR FOOD

We serve fresh, made to order food using the highest-quality ingredients possible without artificial colors, flavors, or preservatives. With a menu that can accommodate almost any dietary lifestyle or preference, we are committed to advanced animal welfare standards, minimizing food waste within the restaurant, and innovating our packaging to reduce waste. Already, 100% of eggs purchased are cage-free and we source 100% of our cheddar jack, Montamora, Parmesan, feta, butter and cooking cream from dairy cows that have never been given artificial growth stimulants or hormones.

[Animal Welfare](#) | [Ingredient Statement](#)

[Nutrition](#) | [Prohibited Ingredients](#)

Feedback

(997) 202-5413

Birthday

How do you identify? e.g. Non-Binary

Leave blank to keep your current password

Password

Select your purpose and we'll customize your options based on your specific goals.



Slim Down



Eat Well



Stay Fit



Take A Break



Meals

## Dietary profile and preferences

58% of shoppers want healthier menu options and 46% of them would like to manage their dietary preferences with their preferred restaurants. Dietary profiles help brands make personalized recommendations to shoppers based on their lifestyle preferences. This customized service helps restaurants boost product sales and build brand loyalty.

Smoothie King allows customers to select lifestyle preferences and recommends products based on customers' needs.

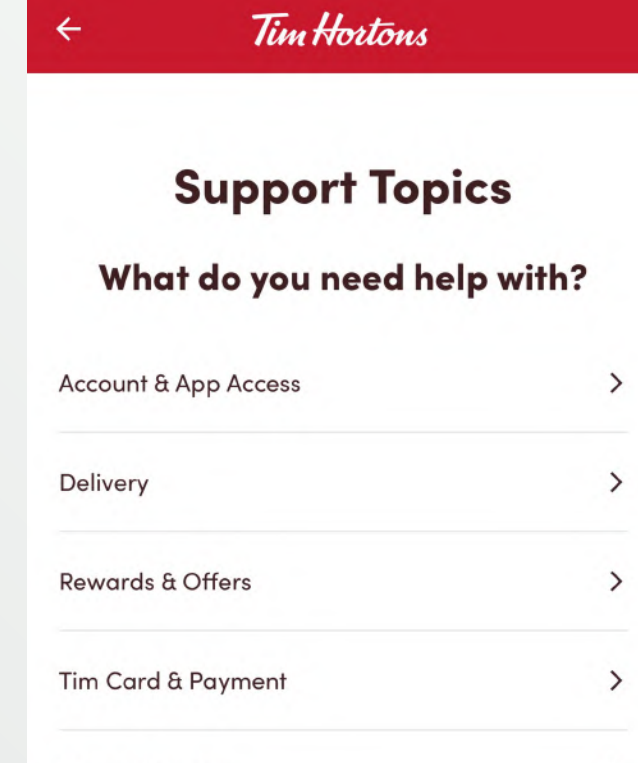
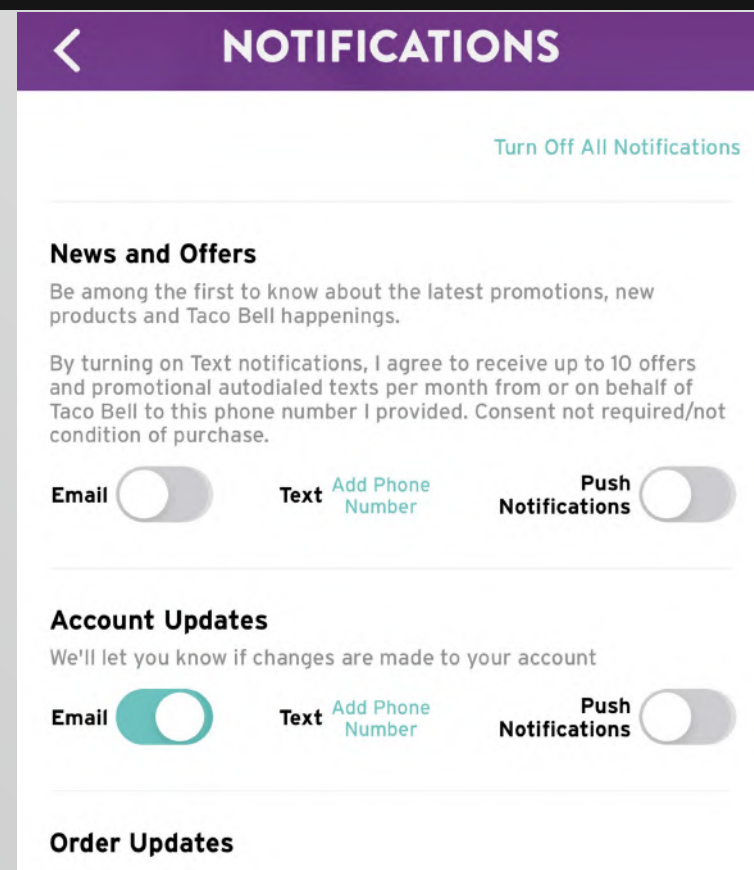


CUSTOMER ENGAGEMENT: SPOTLIGHT

## Personalized communication preferences

55% of shoppers like receiving personalized offer notifications from restaurants based on their location. Personalized communication via email, text and push notifications foster customer engagement and improve customer retention rates. 67% of restaurants allow users to manage email or text notification preferences in their profile, and 26% allow users to sign up for text alerts.

Taco Bell gives customers the option to select email, text and push notification preferences during sign-up and in their user profile.



## Availability of a comprehensive feedback mechanism

Restaurants directly receive only 14% of complaints while 38% are made public because most restaurants don't have a comprehensive feedback mechanism. Feedback collected from customers can help restaurants revamp their menus, resolve technical issues, improve app efficiency and delight customers. 35% of restaurants allow shoppers to submit in-app experience feedback, and only 11% allow for pickup/delivery feedback and recipe/product suggestions.

Tim Hortons' app collects in-app, delivery, in-restaurant and menu-related feedback.

A woman in a white lab coat and face mask is shown in profile, looking at a sample in a laboratory. The background is a dark, blurred laboratory environment with various pieces of equipment and shelves. The word "Leaderboard" is overlaid in white text in the center of the image.

# Leaderboard

# Leaderboard

As part of its 2022 Digital Maturity Benchmark Incisiv assessed 100 retailers across 6 restaurant verticals. The complete list of assessed retailers is provided here.

Each retailer assessed was given an overall rating as well as a functional-area rating across product content and digital experience, return policy, return refunds and 360-degree service. Incisiv's analysis found:

- 27 Leaders
- 24 Challengers
- 26 Followers
- 23 Laggards

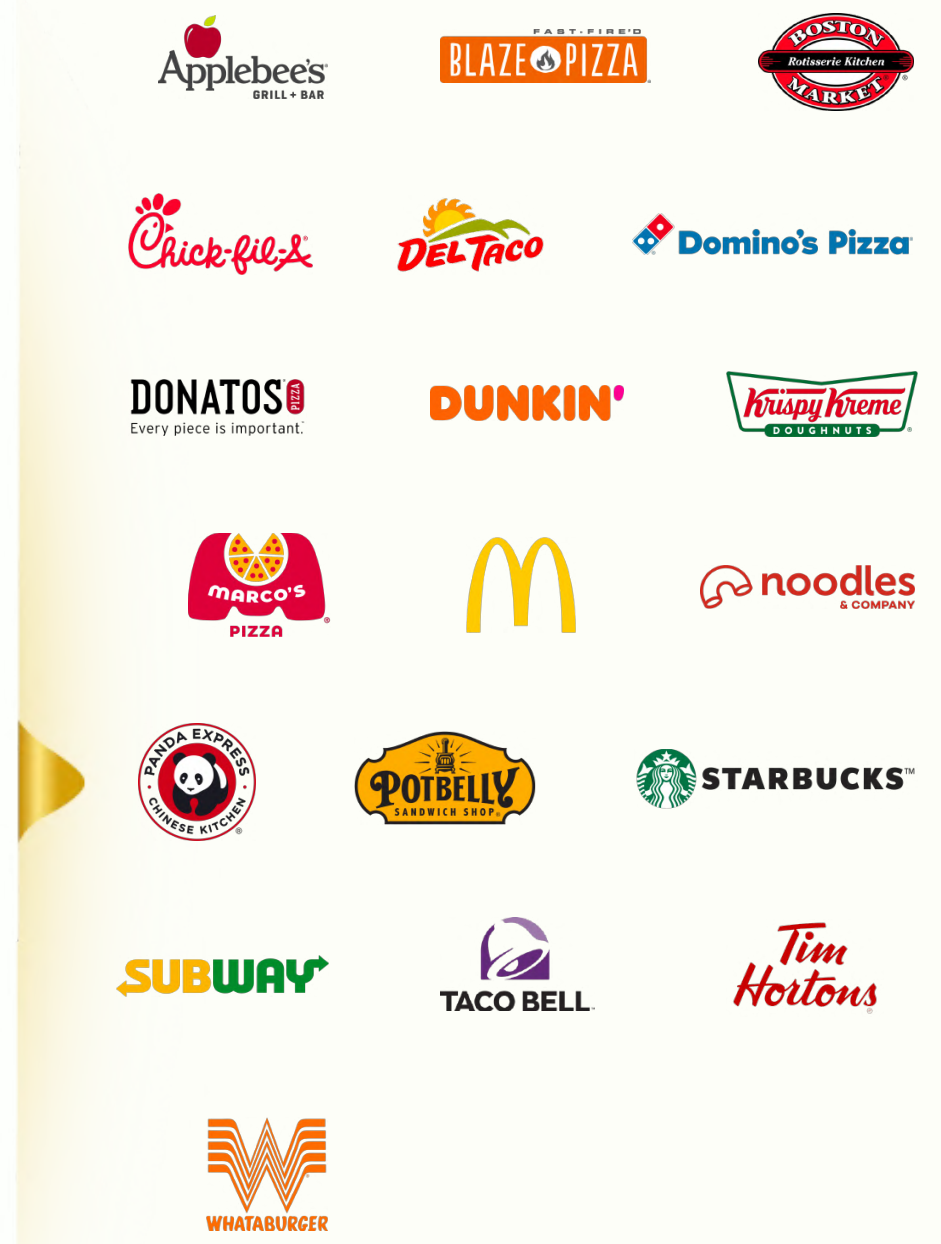
[Get in touch](#) to request detailed information about your rating, or to request a custom benchmark.

AppleBee's  
Arby's  
Au Bon Pain  
Auntie Anne's  
Baskin-Robbins  
Blaze Pizza  
Bojangles  
Boston Market  
Buffalo Wild Wings  
Burger King  
Burgerfi  
Cafe Rio Global Grill  
California Pizza  
Carl's Jr.  
Cava  
Checkers/Rally's  
Chick-fil-A  
Chicken Salad Chick  
Chili's Grill and Bar  
Chipotle  
Church's Chicken  
Corner Bakery Café  
Dairy Queen  
Del Taco  
Dicky's Barbeque Pit  
Domino's  
Donatos Pizza  
Dunkin'  
El Pollo Loco  
Fazoli's  
Firehouse Subs  
Five Guys  
Freddy's Frozen Custard & Steakburgers  
Fuzzy's Taco Shop

Golden Corral  
Great Harvest Bread Co.  
Hardee's  
Hungry Howie's Pizza  
In-N-Out Burger\*  
Jack in the Box  
Jack's  
Jamba  
Jason's Deli  
Jersey Mike's  
Jet's Pizza  
Jimmy John's  
KFC  
Krispy Kreme  
Krystal Company  
Little Caesars  
Marco's Pizza  
McAlister's Deli  
McDonald's  
MOD pizza  
Moe's  
Mountain Mike  
Newk's eatery  
Noodles & Co  
Outback Steakhouse  
Panda Express  
Panera Bread  
Papa John's  
Papa Murphy's  
Penn Station  
Pizza Hut  
Pollo Tropical  
Popeyes Louisiana Kitchen  
Portillo's  
Potbelly Sandwich Shop

Pret a Manger  
Qdoba Mexican Eats  
Raising Cane's  
Rubio's  
Schlotzsky's  
Shake Shack  
Slim Chicken  
Smashburger  
Smoothie King  
Sonic Drive-In  
Starbucks  
Steak 'n' Shake\*  
Subway  
Sweetgreen  
Taco Bell  
Taco Cabana  
Taco John's  
The Cheesecake Factory  
The Habit Burger Grill  
Tijuana Flats  
Tim Hortons  
Torchy's Tacos  
Tropical Smoothie Café  
Waba Grill  
Wendy's  
Whataburger  
Which Wich  
White Castle  
Wingstop  
Zaxby's  
Zoe's kitchen

# Leaders



# Incisiv's 2022 Digital Maturity Benchmark is based on insights from its proprietary digital maturity benchmarking methodology.

## NEXT STEPS

- **Request a custom benchmark** for your brand
- **Share this report** with a friend or colleague via email or social media



## ABOUT INCISIV

---

Incisiv is a peer-to-peer executive network and industry insights firm for consumer industry executives navigating digital disruption.

Incisiv offers curated executive learning, digital maturity benchmarks and prescriptive transformation insights to clients across the consumer and technology industry spectrum.

[www.incisiv.com](http://www.incisiv.com)