Limited Service Restaurant Digital Maturity Benchmark, 2020

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Rakuten Ready, the leader in order-ahead technology, is defining the future with SaaS solutions that makes it easy to deliver superior Order for Pickup and in-store experiences. Our proprietary, predictive arrival technology improves operational efficiency and increases profitability for brands, while rewarding end customers with cost savings, better quality products handed-off, and time back.

Table of Contents.

This is an executive summary report based on Incisiv's analysis of the digital presence of leading Limited Service Restaurants. The companies benchmarked are the **top 52 by annual revenues in US and Canada.**

52
Limited Service Restaurant Chains in US and Canada.

120
digital attributes studied for each banner.

20 million
data points from Incisiv's industry data pool.

8 million
data points from Q3 2020 Consumer Survey.

Chapter 1

The Digital Outlook: The Year of Irrevocable Inflection

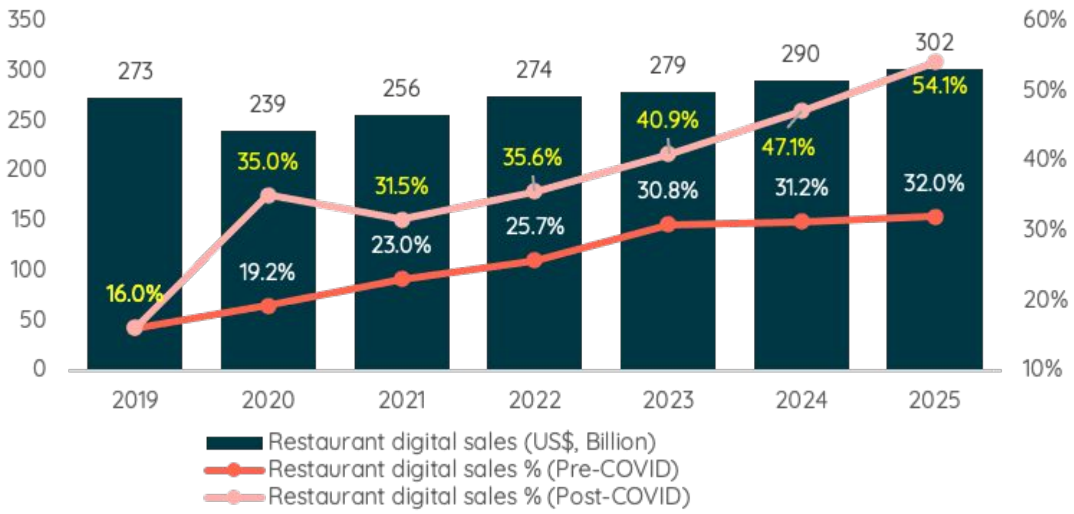
2020 has fundamentally changed customer behavior and role of digital across industries and geographies. While it has been a disastrous year for restaurants with ~25% of restaurant locations expected to shut permanently in the US, it has sparked massive growth in digital sales. Limited Service Restaurants were forced to make investments in order to enhance digital capabilities as a means of survival and those that do will be better positioned should another shutdown occur. Limited Service Restaurants have invested in shoring up digital capabilities across the customer touchpoints, with a focus on ordering and fulfillment.

20% Contribution of digital ordering in April 2020, vs 5% in 2018

~20% Increase in average capability adoption between Pre-COVID (Jan 2020) and October 2020

COVID has completely recalibrated customer expectations and forever changed how the limited / quick service restaurant industry must operate.

Post pandemic, the growth rate of digital ordering for limited service restaurants will stabilize with guests reverting back to in-restaurant pickup and dining. This is particularly true for the 25 - 50 age group. However, LSRs / QSRs are being forced to step up investments across their digital channels as it becomes a significant portion of their overall business. In fact, online driven sales will continue to grow and reach 54% of the industry by 2025, **70% higher than pre-COVID estimates.** Similarly, **the share of delivery is expected to grow to 23% in 2025 vs pre-COVID forecast of 15%.**



Source: Incisiv Projections

Digitally driven sales and Delivery has enabled survival for restaurants during COVID. These capabilities have led to a blurring of traditional business models and the onset of new ones.

Physical restaurants expanding virtual footprint

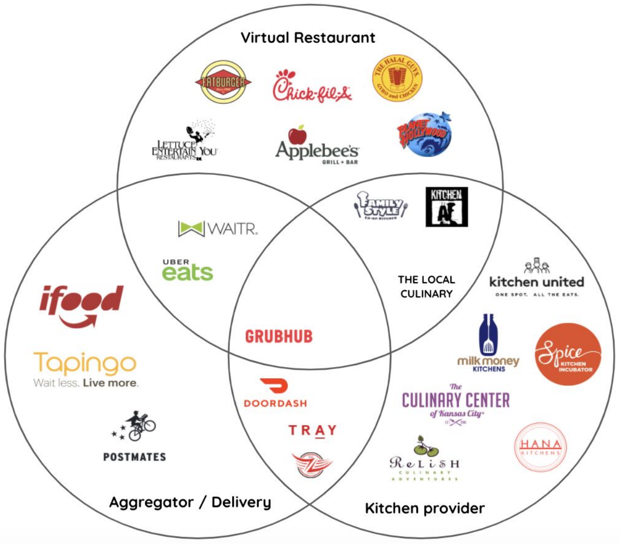
Brands are using virtual restaurant models to test new geographies or start new digitally-relevant food brands from their kitchens.

- **Chick-fil-A:** Launch with DoorDash kitchen concept in Silicon Valley
- **Starbucks:** Premise-based self serve concept in workplaces
- **Smokey Bones:** Launched two delivery-only brands prepared from the kitchen of brand
- **Fatburger:** Launch of virtual sister brand Hurricane from the same kitchen
- **Applebee's:** Plan to expand market footprint by adopting virtual kitchen model
- **Saladworks:** Partnership with Kitchen United to test virtual kitchen concept in three markets

Virtual-only restaurant brands

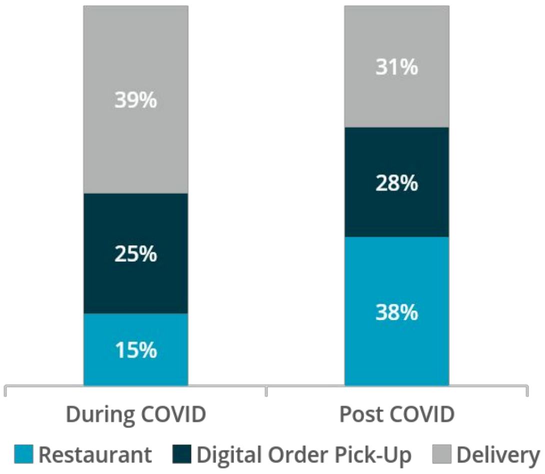
Restaurant brands that do not have physical locations and can only be accessed through-digital touchpoints.

- **Planet Hollywood:** Launch of nine virtual-only restaurant brands
- **MR.LŌPEZ:** Virtual restaurant on the UberEats platform
- **Two Hens:** Virtual-only restaurant launched by Virtual restaurant consultants
- **Kitchen AF:** Virtual-only brand on UberEats, Grubhub and Doordash
- **Family Style:** A co-op kitchen space with multiple virtual kitchen brands
- **Winter Park:** Delivery only kitchen based out of Winter Park Chamber of Commerce



Recovery in the restaurant business is expected to be on pace with the economy once the pandemic subsides. Guests are expected to return to restaurants, with the share of digital dipping in the short term (2021). However, digital will continue to grow with guests going "mobile-first".

Preferred destination post-pandemic

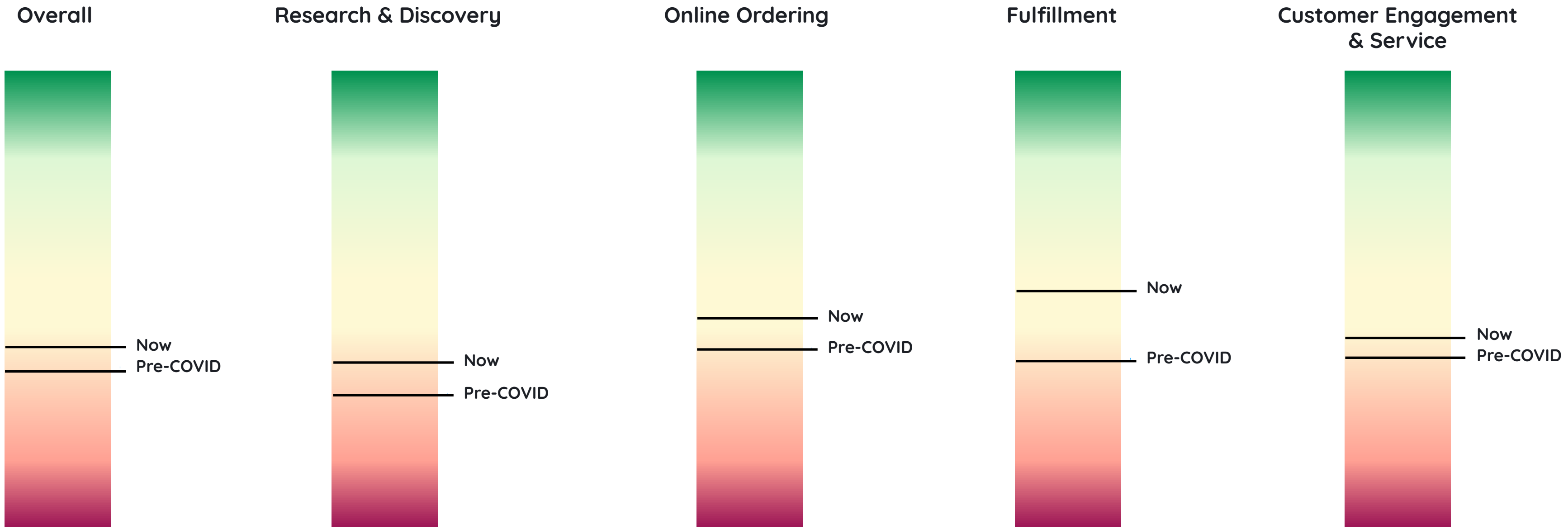


Preferred channel post-pandemic

	Increase	Same	Decrease
In-Restaurant	60%	22%	18%
Delivery	12%	64%	24%
Mobile app	32%	59%	4%

Source: Incisiv customer survey

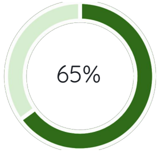
All the aspects of the limited service restaurant digital buying journey have evolved in the last 6 months to account for regulations and customer preferences. Fulfillment maturity has evolved the most.



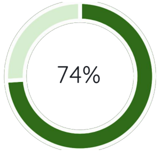
Source: Incisiv analysis; Pre-COVID: Jan 2020; Now refers to October 2020

Customer satisfaction is still low across key aspects of buying journey on the digital platform. Limited service restaurants must look holistically at how changes in shopping behavior must be addressed from a technology and process perspective.

Research & Discovery

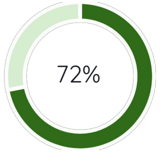


Search and discovery

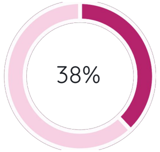


App navigation and filters / discovery

Online Ordering

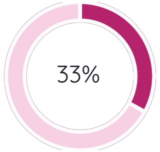


Checkout and payments process

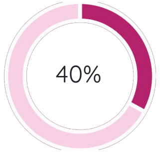


Ability to shop coupons & promotions

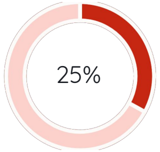
Pick-up & Delivery



Delivery fees

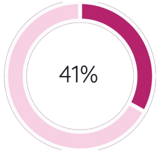


Pick-up

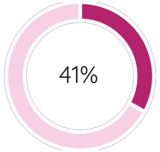


Delivery experience

Customer Engagement & Service



Personalization



Loyalty and rewards

% represents the respondents satisfied or extremely satisfied with the capability

Source: Incisiv customer survey, 2020

Chapter 2

Digital Maturity: The race for the best customer experience is gaining momentum

With increasing customer demand for delivery and takeaway and limited capabilities historically, more than 60% limited service restaurants have expressed intent to invest in their mobile channels. Restaurants have realized the evolved customer demand, and have scaled their capabilities in the last 6 months. The overall maturity remains a low-medium for the industry as a whole. Restaurants need to prioritize investments and deliver the best end-to-end customer experience through investments not just in their platform but back-end Integration, fulfillment, customer service, and operational excellence.

70% of guests prefer restaurant delivery through third party delivery, yet

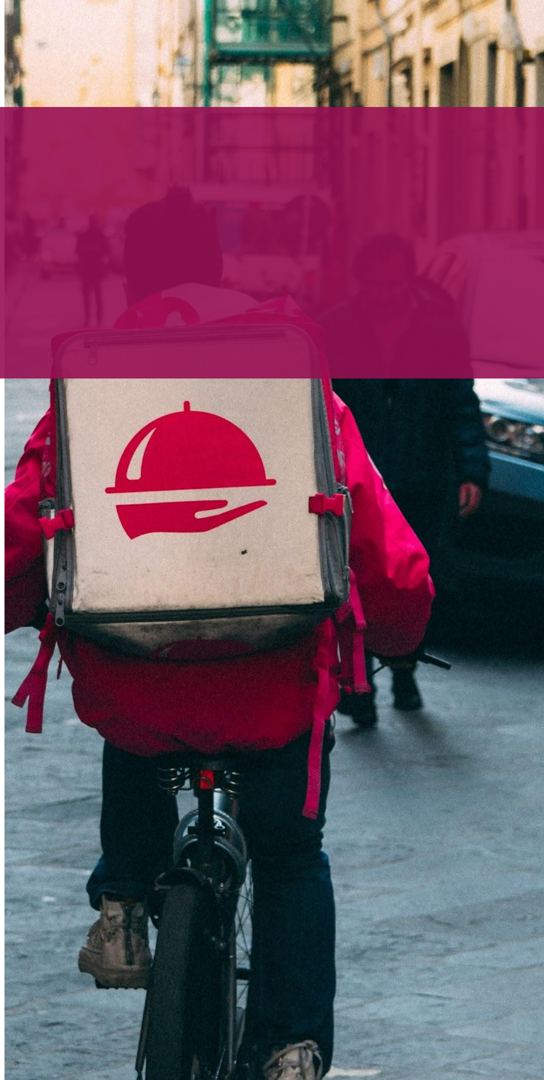
41% of restaurant chains provide in-house delivery capability

While 50% of guests prefer paying from a mobile wallet, fewer than

20% Limited service restaurant chains provide expanded payment options

95% of guests regularly tip delivery drivers while only

32% of limited service restaurant chains provide the option of digital tipping



Limited service restaurants with high digital maturity have been able to capitalize on their investments and minimize the adverse impact on revenue.

2020 will go down as one of the most catastrophic years for the restaurant industry in its history.
However, the limited service restaurant chains that invested early and therefore have higher digital maturity, have managed to minimize the impact on their total revenue as compared to their less digitally mature peers.
With 50% of guests still hesitant to dine out and with digital behaviors becoming habit, the importance of digital channels and their correlation with higher revenue is only expected to become stronger.

Jan-Jun 2020 vs Jan-June 2019 revenue impact

High digital maturity	**-2%**
Medium digital maturity	**-4%**
Low digital maturity	**-10%**

Source: Financial statements of publicly listed LSR chains assessed (list in leaderboard)

Limited service restaurant benchmark categories & formats benchmarked.

Research & Discovery (33)

Digital Ordering (31)

Order Fulfillment (15)

Customer Engagement & Service (39)

Formats benchmarked

Burger (17)

Chicken (10)

Global (9)

Pizza (11)

Sandwich (14)

Snack (8)

Global includes: Mexican, Asian, Spanish and others

Limited service restaurants have made significant strides in fulfillment capability maturity in 2020, research & discovery and customer engagement still have ample room for improvement.

Research & Discovery

- Menu Information
- Search
- Home Screen
- Store-related Information

Digital Ordering

- Ordering & Checkout
- Payment

Order Fulfillment

- Takeaway ▲
- Home Delivery ▲
- Communication

Customer Engagement & Service

- Offers and Promotions
- Loyalty Program
- Customer Engagement Initiatives
- Social Media / Community
- Customer Service ▲
- Account Management

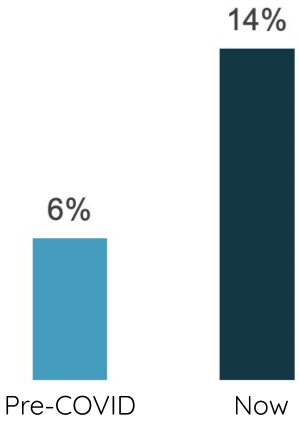
Leader | Near Leader | Follower | Near Laggard | Laggard | ▲ Indicates growth of at least one tier since Jan 2020

Research & Discovery

Growth in adoption of capabilities in 2020.

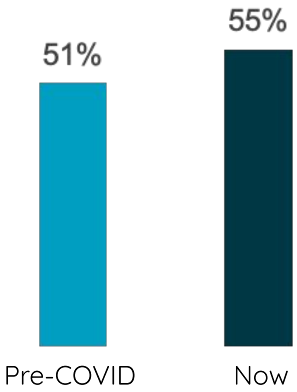
Research & Discovery has seen the least improvement in capabilities since the pandemic. As limited service restaurants focused their efforts on scaling fulfillment and ordering options, contextual search and filters still leave a lot to be desired.

With disrupted supply chains, limited ingredient availability and restricted staff, limited service restaurants have had huge variations in item availability. However, only 14% of restaurants offer guests this visibility.



Item availability status

While 42% of guests look for online promotions and deals before placing an online order, this feature has not seen much growth in 2020.



Section for offers & promotions

Source: Incisiv Research

Prioritization of feature-functionalities by limited service restaurant chains.

Table stakes that guests expect

1. **Menu:** View nutrition and allergen information, cross-selling
2. **Home screen**: Section for promotions, rewards
3. **Store information:** Store operations hours, store locator

Differentiating capabilities that guests value

1. **Filters:** Filters for allergens, dietary restrictions
2. **Search:** Advanced search features: suggested and phonetic search
3. **Home screen:** Section for new launches, bestsellers, mobile app tour demonstration

Takeaway

Research and Discovery isn't just about a working search function - it is a guide for guests to discover their offerings in the easiest manner and provide all the information and incentives to make a quick purchase with the highest order value.

Restaurant chains should look to offer streamlined menu options that highlight time-sensitive promotions, best-sellers, recommendations and preparation details. These are some of the critical customer touchpoints that define an optimal customer experience.

Leaders in Research & Discovery				
#1	#2	#3	#4	#5
McDonald's	Starbucks	DQ	SUBWAY	SONIC

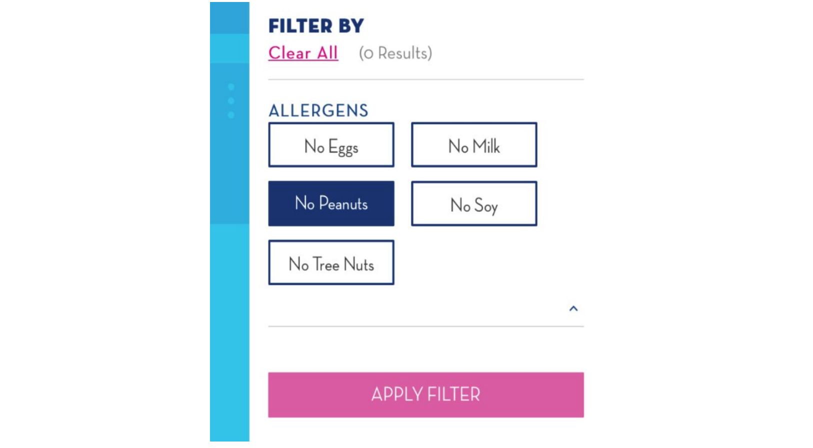
Research & Discovery

Case examples - Differentiating capabilities adopted by limited service restaurants.

Brand: Baskin Robbins

Feature: Allergen filter to shortlist menu options

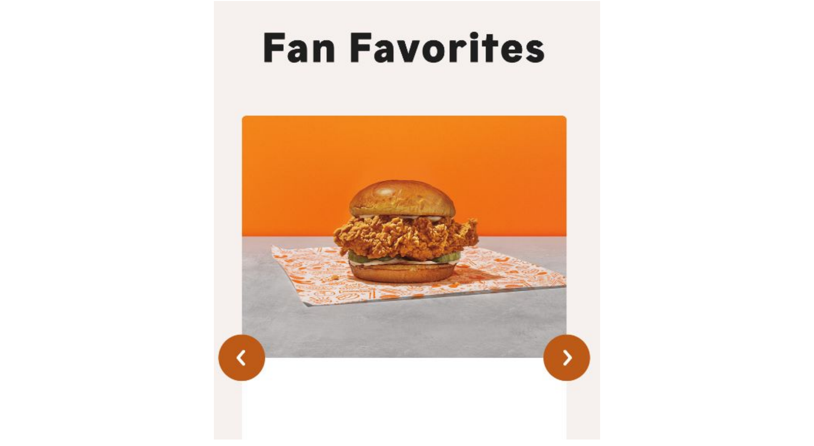
Current adoption*
6%



Brand: Popeyes

Feature: Best sellers on homepage

Current adoption*
9%



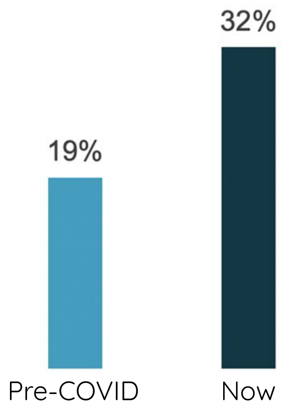
Current Adoption*- % of retailer sites assessed that have this feature

Digital Ordering

Growth in adoption of capabilities in 2020.

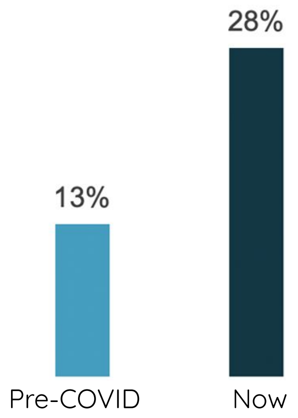
While limited service restaurants have made progress in improving the ease of ordering and expanding payment options, there are still significant opportunities for growth that could reduce cart abandonment and increase conversion. Close to 70% of restaurant chains have stated their intent to increase investments in mobile ordering. If this holds true, most QSR chains will make major progress in moving up the maturity curve and will lead all other segments.

With more sales moving off-premise, the option of tipping becomes tougher, largely affecting restaurant associates. Limited service restaurants have stepped up and now 32% offer the option to tip digitally.



Digital tipping

With more than 70% of guests changing their payment preferences for safety reasons, limited service restaurants have integrated several new payment capabilities in the last 6 months.



Adoption of Apple Pay

Source: Incisiv Research

Prioritization of feature-functionalities by limited service restaurant chains.

Table stakes that guests expect

1. **Ordering:** Option to select store before adding items to cart
2. **Customization:** Options for order customization
3. **Payments:** Pay via debit / credit card

Differentiating capabilities that guests value

1. **Ordering:** Visibility of ETA on cart page
2. **Group orders:** Option to build group cart, split order between friends
3. **Payments:** Expanded payment options like ‘closed loop wallet’, PayPal, pay at store, pay at delivery

Takeaway

Building an efficient and user-friendly digital ordering process is crucial to driving conversion. For limited service restaurants, there are 2 focus areas that can help increase the effectiveness of their ordering capabilities:

1. Customizations and recommendations: With more than 50% of guests expressing interest in customizing their orders, a simple and streamlined process for customization is a big incentive.
2. Payment options: With contactless payments becoming the order of the day, increased payment options are critical to the customer experience.

Leaders in Digital Ordering				
#1	#2	#3	#4	#5
Panda Express Chinese Kitchen	Wing Stop	Pizza Hut	Moe's Southwest Grill	Jersey Mike's Subs

Digital Ordering

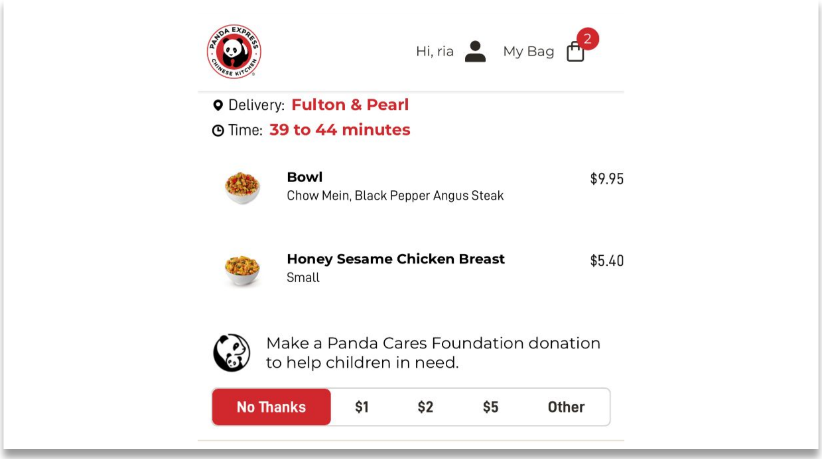
Case examples - Differentiating capabilities adopted by limited service restaurants.

Brand:

Feature: ETA on cart page

Current adoption*

34%

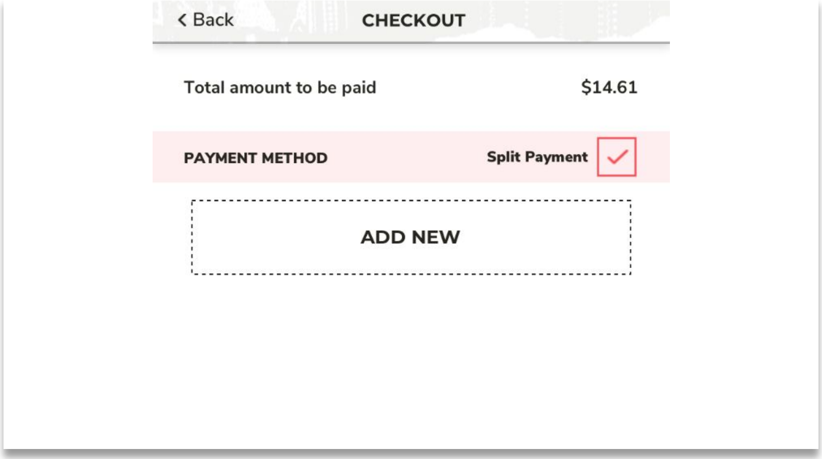


Brand:

Feature: Option to split bill between friends

Current adoption*

6%

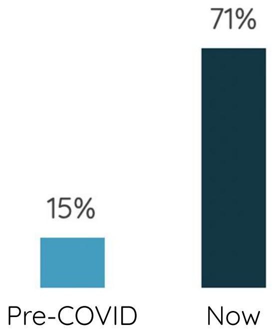


Current Adoption*- % of retailer sites assessed that have this feature

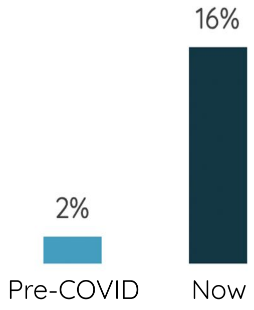
Order Fulfillment

Growth in adoption of capabilities in 2020.

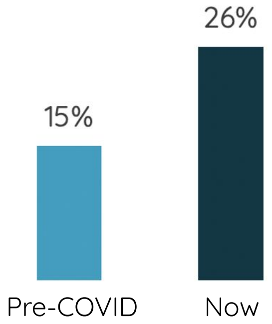
Maturity amongst fulfillment methods has seen the greatest advancement in 2020. Curbside pick-up adoption has experienced a 5x increase while home delivery adoption has more than doubled since 1st quarter 2020. More than 70% of limited service restaurants now offer curbside/ drive-thru pick-ups, making it the most advanced segment among all other retail segments (e.g; grocery, apparel, etc.).



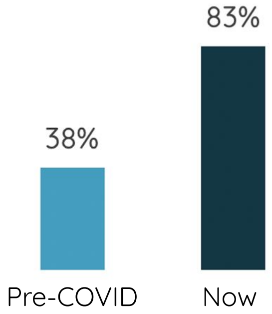
Curbside pick-up



Use of location tech



Dedicated counter for online pick-up



Home delivery

Source: Incisiv Research

Prioritization of feature-functionalities by limited service restaurant chains.

Table stakes that guests expect

1. **Takeaway:** Availability of options including pick-up from restaurants, curbside, schedule order pick-up
2. **Delivery:** Availability of home delivery
3. **Returns:** Option to return / ask for refund online order

Differentiating capabilities that guests value

1. **Takeaway:** Capability where restaurants are uses location technology to receive a prompt for customer check-in / ETA
2. **Delivery:** Option of contactless delivery
3. **Communication:** Real-time order tracking

Takeaway

With more than 70% of guests now preferring off-premise dining (pick-ups and deliveries) to dining-in, expanding fulfillment capabilities has become the point of focus for all businesses. Limited service restaurants are one of the most mature segments with 80%+ penetration of delivery. The evolution in fulfillment will now be around making the experience more seamless and more efficient. This will ensure guest satisfaction as well as increased order size. In addition, chains must be more efficient to ensure all fulfillment methods are profitable.

Leaders in Order Fulfillment				
#1	#2	#3	#4	#5
Panera Bread	Chipotle Mexican Grill	FIVE GUYS	Pizza Hut	Little Caesars

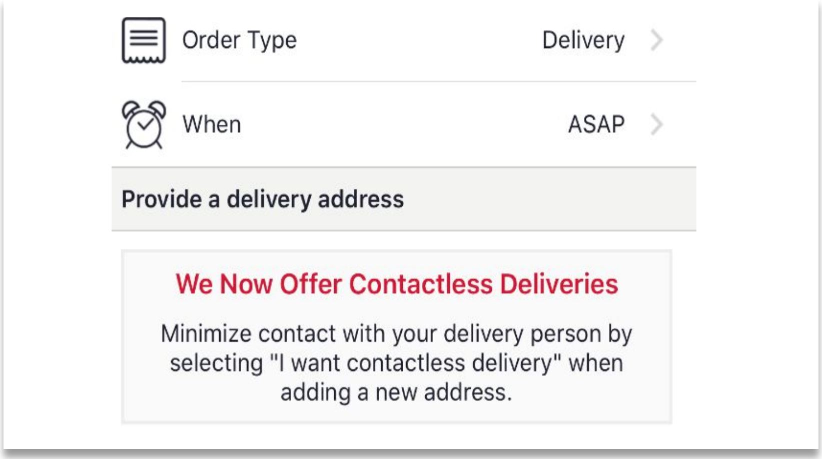
Order Fulfillment

Case examples - Differentiating capabilities adopted by limited service restaurants.

Brand: FIVE GUYS

Feature: Contactless delivery

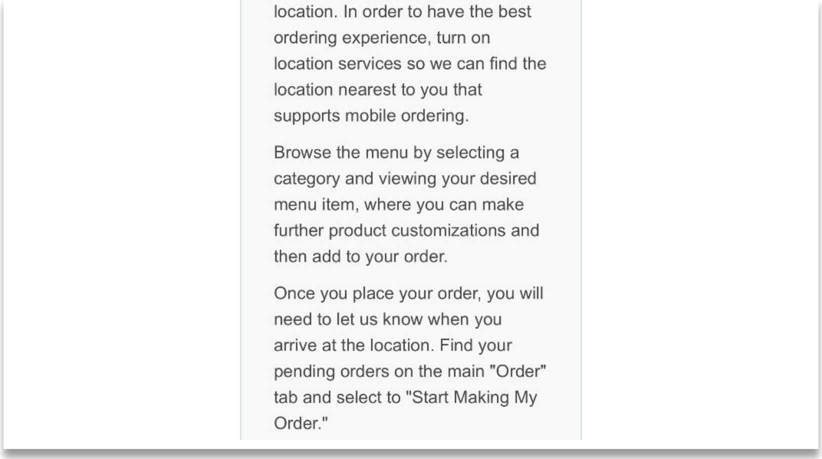
Current adoption*
32%



Brand: DQ Dairy Queen

Feature: Check-in prompt

Current adoption*
16%

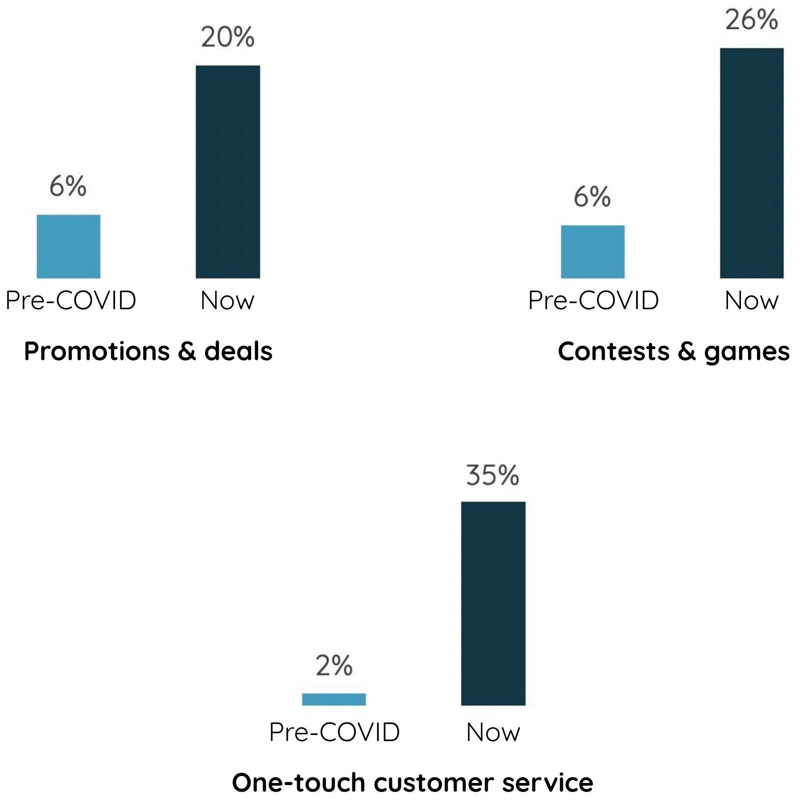


Current adoption*- % of retailer sites assessed that have this feature

Customer Engagement & Service

Growth in adoption of capabilities in 2020.

While limited service restaurants have shown some evolution in customer service capabilities, they rank low on engagement capabilities, including promotions, guest contests, etc. With digital sales becoming increasingly critical for restaurant chains, driving customer service and engagement will grow in importance.



Source: Incisiv Research

Prioritization of feature-functionalities by limited service restaurant chains.

Table stakes that guests expect

1. **Promotions:** Customer sign-up for offers and promotions
2. **Self-help customer service:** Availability of store contact details, FAQs, contact form
3. **Account:** Options to manage notification preferences and bookmark favorite store

Differentiating capabilities that guests value

1. **Promotions:** View time sensitive promotions
2. **Customer engagement**: Options to provide recipe suggestions
3. **Customer service:** Availability of on-demand live chat
4. **Account:** Option to select language, provide feedback for delivery

Takeaway

It has been proven that people's expectations of service are evolving. They want more than just quality food; they expect to feel valued (and safe). Limited service restaurants should provide their guests with additional benefits such as documented safety measures, loyalty programs, offers/promotions and social media integration to ensure repeat visits.
Providing good customer service is equally important and brands need to ensure that there is a proper platform available for guests to be heard. 62% of US guests have switched brands in the past year due to poor customer service.

Leaders in Customer Engagement & Service

#1	#2	#3	#4	#5
		DUNKIN'	Chick-fil-A	McALISTER'S DELI Auntie Anne's

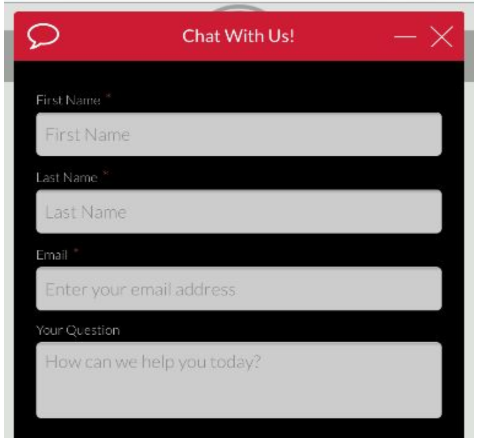
Customer Engagement & Service

Case examples - Differentiating capabilities adopted by limited service restaurants.

Brand: Jimmy John's

Feature: Live chat assistance

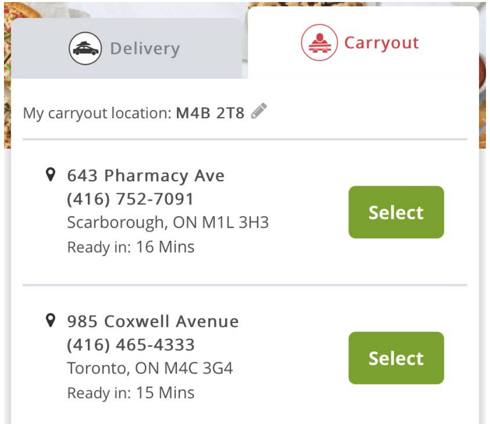
Current adoption*
9%



Brand: Pizza Hut

Feature: Average order processing time

Current adoption*
25%



Current adoption*- % of retailer sites assessed that have this feature

Sponsors Q&A.

With safety concerns and guests avoiding public places, the last 6 months have been hard on the restaurant industry. What is your outlook (next 12 months on traffic and sales)?

Rob Chapman

Director of Security Architecture
Cybera

The 12-month outlook for restaurants comes down to how quickly and effectively they have been able to pivot their businesses. In just a couple months, everyone has been scrambling to shift their core food service business beyond the walls of their physical stores.

It's no surprise that restaurants with drive-throughs are seeing much more success than their dine-in-only peers. And now we're starting to see restaurant chains that haven't traditionally relied on the drive-through model modifying their plans to accommodate that need going forward.

We'll likely see new restaurants emerging primarily in the standalone and drive-through category versus the restaurant-in-a-mall model. That might become a more permanent result from the pandemic. Unfortunately, the large full-service restaurants are still struggling and will continue to face ongoing challenges as new waves of COVID-19 outbreaks threaten to force rolling shutdowns for the foreseeable future.

Cathy Novelli

VP of Marketing and Communications
Rakuten Ready

Due to the increase in innovation and the nimble adjustments of operating models, we have a very optimistic outlook for the restaurants over the next 12 months. While some restaurants will (or have already) open up again for dine-in customers, the first half of 2021 is likely to have ebbs and flows of uncertainty, so it's vital for restaurants to meet all customers wherever they are, including drive-thru, in-store and curbside pickup (in addition to the often default of delivery).

Sponsors Q&A.

While guests are avoiding dine-in, digital ordering has seen a massive increase. How are restaurateurs coping with this unprecedented increase in online demand?

Rob Chapman
Director of Security Architecture
Cybera

Technology plays a vital role in fulfilling demand, because the customer experience has expanded throughout the entire process—from online ordering to the physical parking lot.

The shift to online and mobile ordering happened almost overnight. That requires restaurateurs to provide a frictionless experience. Some chains have already adjusted traffic flow based on ordering method. They're dedicating drive-through lanes for digital orders to improve efficiency and reduce wait times.

With the rising popularity of mobile ordering, carryout, and curbside pickup, reliability and security are critical for ordering applications and technologies. Order accuracy is especially critical now, because patrons don't want to physically interact with someone to complain if their order isn't right.
Restaurateurs must provide high-quality food service beyond their physical premises, maintaining a good customer experience even with social distancing and contactless service. They must also understand that new technology investments also mean additional security requirements and employee training.

Cathy Novelli
VP of Marketing and Communications
Rakuten Ready

This pandemic has really shown restaurants how creative and resourceful they can be, when pushed. This was especially true with high volume operators who required technology to help them manage orders, time the arrival of customers, and to provide services like curbside / drive-thru pickup for digital orders.

While COVID pushed most restaurants to innovate faster with technology and invest quickly to survive, they will benefit in the long-term. Those investments will deliver more seamless and enjoyable experiences for customers, while also enabling restaurants to lean further into Takeout or Ghost Kitchen formats that are more profitable for many.

Sponsors Q&A.

With demand shifting to digital channels, how are restaurants re-jigging their operating model?

Rob Chapman
Director of Security Architecture
Cybera

Ordering, payment, and fulfillment models radically changed in 2020. Restaurants must reconsider their operations, realizing that their overall presence and customer experience includes both their physical and digital footprints.

Although technology has always been a competitive differentiator, now it's a requirement for survival. Building more of an online presence—or partnering with companies that specialize in technology—can help. Look for more independent restaurants embracing the "ghost kitchen" model to survive. This allows them to focus on the culinary aspects rather than having to become technology experts.

Unfortunately, smaller independent restaurants still face technology hurdles. If they weren't built for ecommerce, they can't suddenly handle the influx of take-out or delivery orders over the phone. But if they have to build an online presence just for taking orders or have to start accepting non-present card payments, that increases expenses. The pandemic has flipped their business model upside down.

Cathy Novelli
VP of Marketing and Communications
Rakuten Ready

With the increase in digital channels, restaurants have had to rethink how their business will work. It's already happening but there will be a re-imagination of what the brick & mortar restaurant's role is - with many (like QSR) turning into more of a pickup site than a destination. This need has arisen out of the omnipresence of mobile technology as well as to satisfy the rise in consumer expectations of a faster, more seamless order for pickup experience.

We were also so impressed by restaurants who had to rework how they cook their food to make them conducive to travel, a la steaks and seafood. There was great demand from customers and such restaurants found a way to meet their needs and upend the way they have worked, for decades in many cases, to support off-premise digital-first models. Again, we believe meeting customers where they are will continue to be core to long-term success.

Sponsors Q&A.

Which are the top 3 areas where you see restaurants focusing attention and dollars in the race to offer the best customer experience?

Rob Chapman
Director of Security Architecture
Cybera

Being hyper-adaptive and customer-responsive are the key goals right now. We've all experienced the feeling of years being packed into a few months during 2020. The restaurant sector is on the frontlines of these market disruptions and shifting business dynamics.

Ordering and payment systems are high on the list of investment priorities. Today's consumers expect a variety of purchasing options. The more seamless restaurants can make the ordering, payment, and fulfillment experience, the happier their customers will be.
Another key area of technology investment has been improving the guest experience in terms of in-person transactions. Artificial intelligence is driving faster ordering and higher order accuracy. For instance, AI can suggest menu items to waiting customers, speeding up the transaction and creating upsell opportunities.

We'll likely start seeing some clear best practices permeating across the entire industry, especially if social distancing and contactless service remain the norm.

Cathy Novelli
VP of Marketing and Communications
Rakuten Ready

a) Customer centricity: The concept of putting your customer at the center of your operations will be taken a step further with the use of mobile and geo-location technology. If restaurants know exactly when customers will arrive they can guarantee freshness and a seamless contactless handoff. In addition, it creates enhanced operational efficiencies and safer processes for employees.
b) Format proliferation: We believe that this is not a time for restaurants to lock themselves into one format for all locations. Customer expectations have evolved and operators should think about diversification based on the market (incl. Ghost kitchens, dine-in and take out). This will better a chain's chances for success.
c) A-commerce: Augmented commerce often leverages voice commands to perform a variety of ordering functions previously unavailable. This is experiencing huge growth and we see multiple use-cases in restaurant environments, including voice ordering meals via car or phone system and notifying employees where you're parked for curbside pick up, all powered by customer geo-location. We expect even greater adoption in the coming year.

Sponsors Q&A.

How have you partnered with restaurants / other partners to help them compete successfully, drive customer loyalty, and grow?

Rob Chapman
Director of Security Architecture
Cybera

The need for reliable mobile technology impacts everything. Whether restaurant staff are fulfilling orders on tablets outside the store or guests are demanding Wi-Fi access in the parking lot, the network must be reliable, secure, and flexible.

We've seen a lot of interest in Wi-Fi networks. Outdoor Wi-Fi reliability is extremely critical right now—for waitstaff, payment processing, and customers. But you need to ensure security beyond the four walls of your restaurant and make sure your POS system works just as effectively over your Wi-Fi network to maintain PCI compliance.

The network infrastructure must also be resilient enough to account for the unexpected. For example, is there immediate failover to wireless in case the primary broadband connection goes down?

We're all learning lessons the hard way during this pandemic, but we're doing everything we can to help our customers get through these challenging business conditions.

Cathy Novelli
VP of Marketing and Communications
Rakuten Ready

Rakuten Ready helps to power successful takeout programs for brands such as Chick-Fil-A, Pizza Hut, Applebees, IHOP, Qdoba, and more. We also support many retail and grocery brands in their goals to deliver faster, safer, and more seamless experiences which are directly attributable to customer satisfaction and loyalty.

Chapter 3

Digital Maturity Leaderboard

The US and Canada Limited Service Restaurant Business: By the Numbers.

With more than 50% of limited service restaurant sales shifting off-premise during the pandemic, and guests still hesitant to return to dine-in options, digital maturity is a priority for restaurants. Plus, it has been proven that the financial performance of current digital leaders exceeds their peers that are less digitally mature, making this a mandate rather than a choice. The customer experience from search to service will define customer loyalty and repeat behavior. Restaurants must put strategies and capabilities in place before they lose out to the chains that do.

86% of top 50 LSR chains in US offer a mobile app that supports online ordering vs 58% of chains in Canada

~10% Average higher digital maturity of US mobile apps vs Canada

Limited service restaurants digital presence landscape in US.

Brands assessed in US: 50

43

Brands with app and mobile ordering

4

Brands with app without mobile ordering

3

Brands with no app; offer website ordering (not included in rankings)

Limited service restaurants digital presence landscape in Canada.

Total brands assessed in Canada: 31

18

Brands with mobile ordering function on app

4

Brands with app without mobile ordering

7

Brands with no app and do not offer website ordering (not included in rankings)

2

Brands with no app; offer website ordering (not included in rankings)

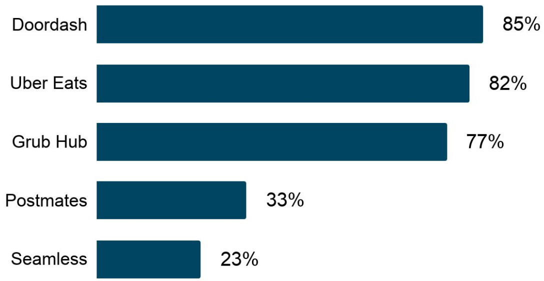
~90% of limited service restaurants across US and Canada have partnerships with third-party delivery providers.

US

39 Out of the 43 ordering apps **(91%)** offer the option of delivery via third-party delivery providers

3 Average number of third party partnerships per restaurant

Penetration of third-party delivery providers



Canada

16 Out of the 18 ordering apps **(89%)** offer the option of delivery via third-party delivery providers

2.25 Average number of third party partnerships per restaurant

Penetration of third-party delivery providers

US Digital Leaderboard 2020 (Top 1-15)

US Rank	Banner	Revenue (US$ Bn)	Brand Segment	Discovery	Ordering	Fulfillment	Service
1	Starbucks	26.508	Snack	2	10	30	1
2	Panera Bread		Sandwich	23	9	1	7
3	McDonald's	21.077	Burger	1	26	22	2
4	McAlister's Deli		Sandwich	17	7	11	5
5	Pizza Hut	1.027	Pizza	32	3	4	18
6	Domino's	3.618	Pizza	30	7	6	9
7	Chipotle	5.586	Global	15	16	2	26
7	Moe's		Global	12	4	25	13
9	Panda Express		Global	37	1	20	13
10	Qdoba Mexican Eats		Global	10	13	16	11
11	Taco Bell	2.079	Global	6	15	18	8
12	Marco's Pizza		Pizza	21	10	10	23
13	Jimmy John's		Sandwich	22	10	7	34
14	Wingstop	0.199	Chicken	32	2	13	30
15	Papa John's	1.619	Pizza	23	6	9	38

Top quartile Second quartile Third quartile Fourth quartile

US Digital Leaderboard 2020 (Top 16-30)

US Rank	Banner	Revenue (US$ Bn)	Brand Segment	Discovery	Ordering	Fulfillment	Service
16	Five Guys		Burger	19	22	3	30
17	Auntie Anne's		Snack	28	18	21	5
18	Jersey Mike's		Sandwich	37	5	15	23
19	El Pollo Loco	0.442	Chicken	23	24	8	20
20	Dairy Queen		Snack	3	31	35	18
21	Subway		Sandwich	4	18	37	26
22	Chick-fil-A		Chicken	28	29	29	4
23	Popeyes Louisiana Kitchen	0.482	Chicken	14	16	16	40
24	Little Caesars		Pizza	31	22	5	38
25	Sonic Drive-In		Burger	5	38	22	23
26	Steak 'n' Shake	0.595	Burger	23	21	31	16
27	Del Taco	0.513	Global	36	27	11	21
28	Tim Hortons	3.344	Sandwich	19	31	26	16
29	Dunkin'	1.370	Snack	13	41	36	3
29	Whataburger		Burger	9	37	37	10

Top quartile | Second quartile | Third quartile | Fourth quartile

US Digital Leaderboard 2020 (Top 31-47)

US Rank	Banner	Revenue (US$ Bn)	Brand Segment	Discovery	Ordering	Fulfillment	Service
31	Baskin-Robbins	1.370	Snack	8	27	37	26
32	Papa Murphy's		Pizza	17	20	32	34
33	Tropical Smoothie Café		Snack	35	24	28	13
34	Wendy's	1.709	Burger	6	36	37	22
35	Firehouse Subs		Sandwich	37	29	32	11
35	Jason's Deli		Sandwich	44	14	14	44
37	Shake Shack	0.595	Burger	32	33	18	36
38	Zaxby's		Chicken	37	34	32	30
39	Carl's Jr.		Burger	11	35	41	40
40	Burger King	1.777	Burger	16	40	27	43
41	Jack in the Box	0.950	Burger	23	42	24	37
42	Church's Chicken		Chicken	41	38	43	33
43	Culver's		Burger	43	43	42	42
44	Arby's		Sandwich	42	44	44	29
45	In-N-Out Burger		Burger	45	44	45	45
46	Raising Cane's		Chicken	46	44	45	45
47	Bojangles'		Chicken	47	44	45	47

Top quartile Second quartile Third quartile Fourth quartile

Canada Digital Leaderboard 2020 (Top 1-15)

US Rank	Banner	Revenue (US$ Bn)	Brand Segment	Discovery	Ordering	Fulfillment	Service
1	Starbucks	26.508	Snack	1	6	12	1
2	Pizza Hut	1.027	Pizza	17	2	3	7
3	Tim Hortons	3.344	Sandwich	6	8	9	2
4	Chipotle	5.586	Global	8	9	2	9
5	Panda Express		Global	18	1	10	5
6	Domino's	3.618	Pizza	13	5	4	14
7	Pizza Pizza	0.211	Pizza	10	4	6	15
7	KFC	2.491	Chicken	3	11	8	11
9	Qdoba Mexican Eats		Global	15	3	13	3
10	Five Guys		Burger	9	13	1	12
11	Papa John's	1.619	Pizza	11	7	7	16
12	Subway		Sandwich	5	10	15	9
13	McDonald's	21.077	Burger	2	16	11	3
14	Little Caesars		Pizza	15	12	4	16
15	Dairy Queen		Snack	3	14	17	13

Top quartile   Second quartile   Third quartile   Fourth quartile

Canada Digital Leaderboard 2020 (Top 16-22)

US Rank	Banner	Revenue (US$ Bn)	Brand Segment	Discovery	Ordering	Fulfillment	Service
16	Chick-fil-A		Chicken	7	16	18	5
17	Wendy's	1.709	Burger	14	18	15	8
18	A&W	1.440	Burger	19	15	14	19
19	Burger King	1.777	Burger	11	19	19	18
20	Firehouse Subs		Sandwich	20	19	19	20
21	Panera Bread		Sandwich	21	19	19	22
22	Arby's		Sandwich	22	19	19	21

Top quartile Second quartile Third quartile Fourth quartile

The **Digital Maturity Benchmark Report** is an annual analysis of the key steps along the digital buying journey for retail and restaurant shoppers.

If you would like more information on obtaining a detailed 1:1 benchmarking report that includes analysis and recommendations on where digital best fits your business, reach out to us at info@incisiv.com.

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