



The Restaurant Friction Index, a PYMNTS and Paytronix collaboration, takes a close look at how the events of the past two years have fundamentally changed the way in which restaurants engage with their customers. We surveyed 501 managers of quick-service restaurants (QSRs) and table-service restaurants from across the United States between Sept. 1 and Sept. 30, 2021 about the ordering features they believe are key to their future success in the digital-first restaurant ecosystem.

2022 EDITION

Restaurant Friction Index

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RESTAURANT FRICTION INDEX



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Acknowledgement: The Restaurant Friction Index was produced in collaboration with Paytronix, and PYMNTS is grateful for the company's support and insight. [PYMNTS.com](https://pymnts.com) retains full editorial control over the following findings, methodology and data analysis.

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INTRODUCTION

Hawaiian quick-service restaurant (QSR) chain Pokéworks announced a partnership with restaurant aggregator DoorDash on Feb. 2.¹ The alliance will allow Pokéworks to access DoorDash Kitchen's Redwood City location, allowing the chain to prepare online orders for delivery from a central location and freeing up the chain's local branches to focus more time and attention on their brick-and-mortar business.

The Pokéworks and DoorDash partnership reflects a far broader trend in the restaurant industry. PYMNTS' latest research shows that digital channels such as aggregators, apps and websites now generate 41% of the average restaurant's sales, and 42% of all restaurant customers now order through aggregators. It is now clear that aggregator partnerships

are an undeniably critical part of any modern restaurant's customer engagement strategy.

Aggregators are just one component of what ideally should be a holistic, cross-channel approach to digital innovation, however. The average restaurant now generates sales on 2.7 different ordering channels: online, on location, via traditional phone calls or even via voice-activated devices, to name a few. Driving revenue in this ecosystem is less about focusing on digital ordering and more about leveraging digital technology to provide customers with a consistent, integrated and seamless cross-channel ordering experience. The main question for restaurants is how exactly to go about doing so.

The 2022 Restaurant Friction Index, a PYMNTS and Paytronix collaboration, provides an insider's look into how restaurants plan to use digital innovation to boost customer engagement strategies and drive sales. We surveyed a panel of 501 managers from restaurants across the United States in September about the ordering, payment and fulfillment features their businesses offer and the innovations in which they plan to invest for a glimpse into their innovation strategies.

We also surveyed a census-balanced panel of 2,146 U.S. consumers in October about their restaurant-ordering habits. We asked respondents which ordering features they used to place restaurant orders and why they used them, to gain

a customer's perspective on how well restaurants' ordering features meet their expectations.

Our research analyzed this data to produce a Restaurant Friction Index (RFI) score for each restaurant in our study. The RFI provides a quantitative measurement of how "innovation-ready" restaurants are and how quickly and seamlessly their customers can place and receive orders. More frictionless ordering experiences earn higher Index scores.

This is what we learned.

1. Author unknown. Pokeworks Partners with DoorDash on Virtual Kitchen Growth. QSR Magazine. 2022. <https://www.qsrmagazine.com/news/pokeworks-partners-door-dash-virtual-kitchen-growth>. Accessed February 2022.

INTRODUCTION

The average restaurant receives orders through 2.7 different channels, ranging from phone calls and on-site orders to aggregators and apps. Providing an integrated ordering experience across all channels is now top priority for restaurant managers.

More restaurant sales now are generated via digital channels such as apps and aggregators than any other way, at 41%. Additionally, 32% of sales are generated on-site, and 26% of sales occur via phone call, indicating how critical it is for restaurants to provide seamless ordering experiences across channels.

Integrating customer experiences across channels is essential for innovation strategies and was cited as “very important” by 41% of managers — a 17% increase in September from April. Adding more ways to order and pay while enhancing or incorporating loyalty features follows closely, as 38% cite them as central elements in their innovation roadmaps.

Twenty-six percent of QSRs mark up their prices, which rise an average of 24% when orders come from aggregators. Many consumers who use aggregators know they pay more through this channel but are willing to spend the extra dollars for convenience.

Restaurants charge more for menu items when listed on aggregators than they do for the same items on their sites, yet QSRs are more likely to do so than table-service restaurants. Twenty-seven percent of QSR managers and 14% of table-service restaurant managers confirm that their prices on aggregators are higher than on their websites.

Despite these higher costs, 42% of consumers still order via an aggregator, chiefly for convenience. Fifty-eight percent of consumers who order via aggregator say they do so because it is convenient, and 42% say this convenience is worth the higher prices they pay.

Not all consumers believe ordering via aggregators is worth the price, however. The consumers who do not use aggregators see high prices as the channel’s greatest drawback, as 41% of them say they do not want to pay delivery or service fees and 26% say aggregators are too expensive.

Nearly all restaurants use loyalty programs to encourage consumers to order directly from the restaurant by offering discounts on menu items. Forty-one percent of consumers say loyalty programs would encourage them to purchase from restaurants, a share that exceeds all others that identified any other ordering feature.

The average restaurant prices their items 4% lower for loyalty program members than for the average website customer, offering cost-conscious consumers a way to dodge high price tags. In total, 96% of all restaurants mark down prices for loyalty program members.

Other features that consumers say would encourage them to make more purchases from restaurants include the ability to pay and order online and the ability to pick up food orders via drive-thru and curbside. Our research shows that 40% of consumers would be more likely to order from restaurants that allowed them to pay or order online, for example, and 33% would be more likely to order from restaurants from which they could pick up curbside.

The average restaurant’s RFI score is just 39.8 out of 100, but the restaurants with the highest index scores in our study earn scores up to 66.8 out of 100.

Top performers offer every ordering feature that enhances the customer experience, and the gap between the best and the rest is most significant when it comes to loyalty offerings. Nearly all top performers offer loyalty logins for online purchases, while not a single bottom performer offers them.

Restaurants are beginning to catch on to customer demand for loyalty programs,

however, and many are investing in loyalty offering expansions. Just 57% of all restaurants currently offer loyalty and rewards programs, for example, and 25% plan to invest in them in the next three years.



Chain QSRs provide the best overall ordering experience of any restaurant type, offering the widest variety of ordering and fulfillment options. Independent QSRs offer the most friction-laden experience.

Chain QSRs offer more ordering and fulfillment options than other eateries, earning an average Index score of 56.7. Independent QSRs trail all other restaurant types in ordering and fulfillment feature selection, earning an average Index score of just 23.6.

Chain QSRs are the most likely type of restaurant to offer seven of the 15 key features that enhance the restaurant customer ordering experience, and they are most likely to allow customers to order via mobile app, aggregator and loyalty channel. We found that 96% of chain QSRs allow customers to order via aggregator and mobile app, while 76% allow ordering through a loyalty channel. Independent QSR restaurants are not the most likely to offer any single ordering or fulfillment feature, by contrast.

The restaurants that made investments in digital ordering and loyalty features since March 2020 are more optimistic than those that did not — regardless of their 2020 sales. Restaurants are generally optimistic about the future, with

75% expecting their average order values to continue to increase from what they were in 2020.

Restaurants that have added digital ordering and loyalty capabilities are the most optimistic of all, whether 2020 brought them higher or lower average order values (AOVs). Among restaurants providing app ordering, 77% of managers say their AOV will grow compared to 2020 moving forward, while 68% of those who do not support app ordering say the same.

Restaurants that expanded loyalty offerings in 2020 experienced a similar confidence boost over those that did not: 77% of those offering loyalty programs that year were expecting their AOVs to increase in 2021, compared to just 71% of those that did not offer the programs.



RESTAURANTS THAT HAVE EXPANDED THEIR LOYALTY OFFERINGS ARE JUST AS CONFIDENT IN THEIR FUTURE SUCCESS AS THOSE THAT HAVE EXPANDED THEIR DIGITAL ORDERING AND PAYMENT CAPABILITIES.

CHANNEL

CHANNEL SURFING:

The importance of cross-channel integration

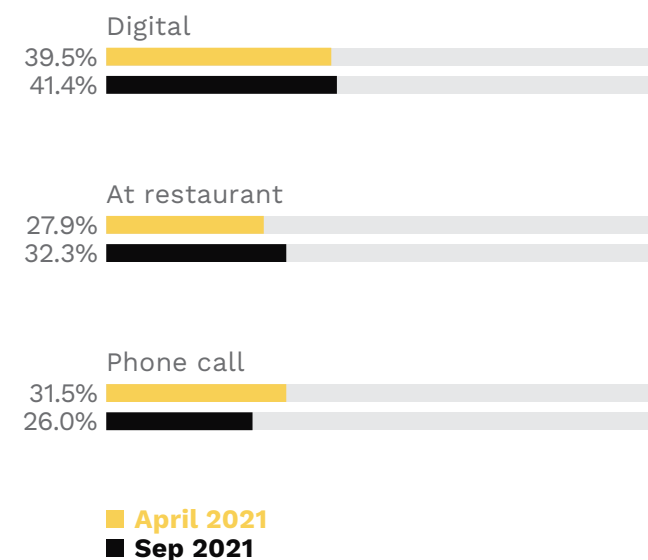
Restaurants now receive orders through an average of 2.7 different purchasing channels at any given time. Consumers place these orders via mobile app, aggregator, desktop website, on-site visits or over the phone. One impact of this development is that more sales now are generated through digital channels than either on-site or over the phone.

SURFING

FIGURE 1:

Where restaurants generate revenues

Share of sales that restaurants generated through select ordering channels in the preceding three-month period, by month



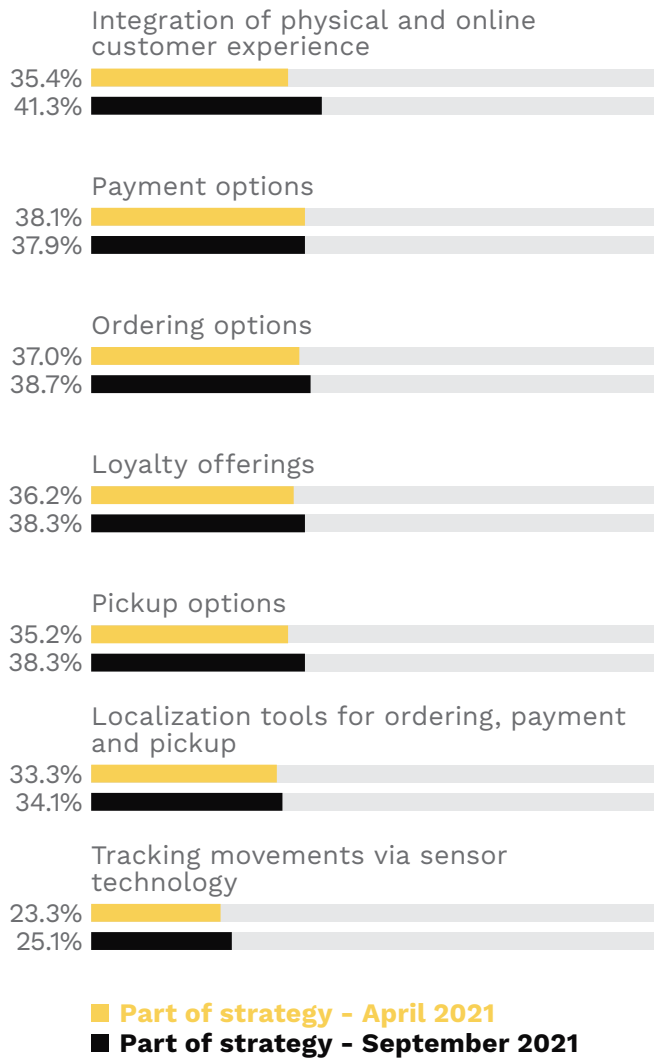
Source: PYMNTS.com | Paytronix
Restaurant Friction Index

PYMNTS' data shows that 41% of the average restaurant's sales now come through digital channels such as mobile apps, aggregators and websites. This share of sales is far more than the 32% the average restaurant generated via its brick-and-mortar location and the 26% generated via phone call.

Restaurant managers are acutely aware of the importance of delivering their customers a consistent ordering experience, no matter how orders are placed. In a 17% increase from April, 41% of managers now consider it "very important" to provide customers with a consistent, integrated cross-channel ordering experience.

FIGURE 2:
Key features for restaurant managers' innovation agendas

Share of restaurant managers who consider select features to be "very" or "extremely" important to their innovation strategies, by month



Source: PYMNTS.com | Paytronix
Restaurant Friction Index

Providing a consistent cross-channel ordering experience is the most cited but not the only factor many restaurant managers considered key to their future innovation strategies in September. Notable shares believe that providing the right ordering options (39%) and payment options (38%) would be “very” important to their innovation strategies going forward. Loyalty features and pickup options were equally common considerations for managers, cited by 38% each.



PROVIDING A
HIGHLY INTEGRATED
CROSS-CHANNEL
ORDERING EXPERIENCE
IS KEY TO DRIVING SALES
IN THE DIGITAL-FIRST
RESTAURANT INDUSTRY.

AGGREGATOR

THE AGGREGATOR MARKUP:

Charging for convenience

Restaurants charge an average of 24% more for menu items listed on aggregators than for the same items listed on their own websites. QSRs are the most likely restaurant type to bump up their aggregator prices, with 27% of QSR managers confirming that they sell the same foods for higher prices on aggregators than they do on their websites. Just 14% of table-service restaurant managers do the same.

MARKUP

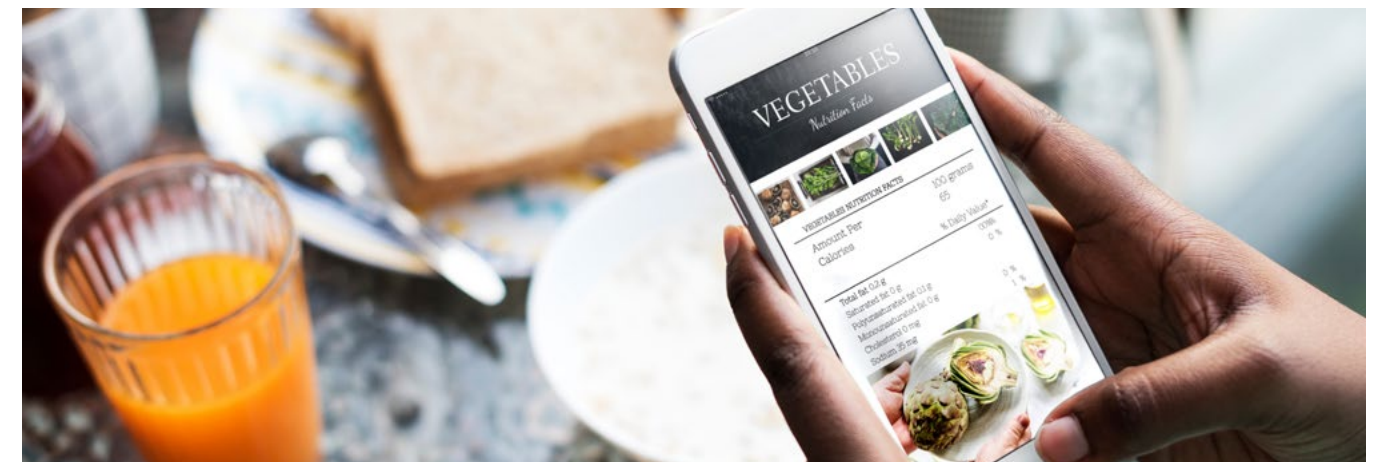
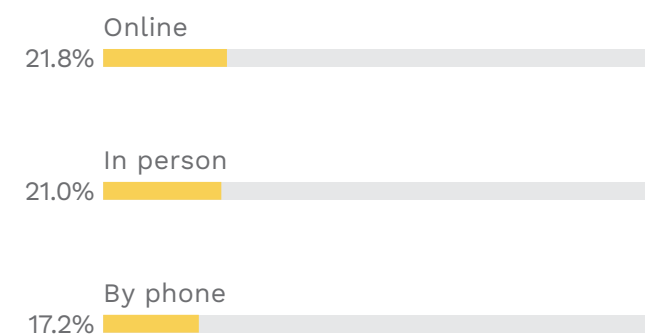
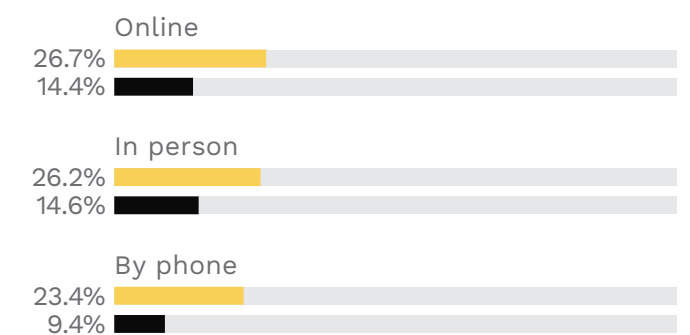


FIGURE 3:
Markups for aggregators

3A: Share of restaurant managers who charge higher prices on aggregators than on other channels



3B: Share of restaurant managers who charge higher prices on aggregators than on other channels, by type of restaurant



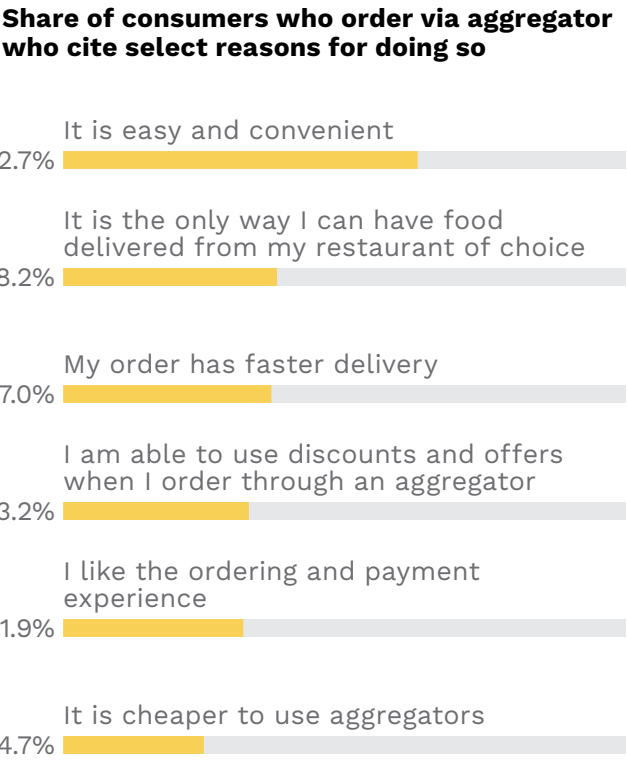
■ QSRs
■ Table-service restaurants

Source: PYMNTS.com | Paytronix
Restaurant Friction Index



Many restaurant customers who use aggregators know that they wind up paying more than if they ordered another way, but they are willing to spend extra for convenience. Among the 42% of restaurant customers who order via an aggregator, 63% say they do so because it is easy and convenient. This makes ease and convenience by far the most common factor driving restaurants’ aggregator sales.

FIGURE 4:
Restaurant customers' reasons for aggregator orders



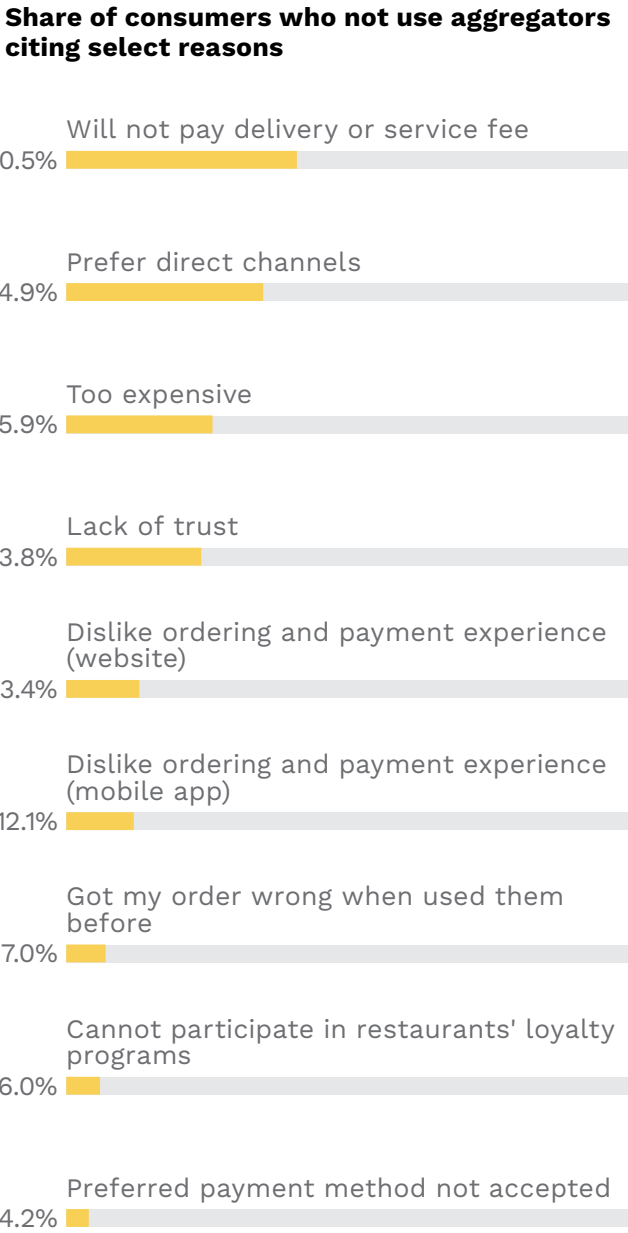
Source: PYMNTS.com | Paytronix
Restaurant Friction Index

The next most common reason restaurant customers order via an aggregator is that it is the only way to have their desired orders delivered to their homes. This is the case for 38% of customers who order through aggregator sites or apps. Notable shares also order via an aggregator because it is faster, because doing so allows them access to discounts or special offers and because they prefer the ordering experience to other channels.

Consumers who use aggregators may be willing to pay a premium for ease and convenience, but many are not. Despite the increased popularity of aggregators, 63% of restaurant customers have not used an aggregator since early 2020. Forty-one percent (an estimated 42 million people) say they avoid aggregators because they are not willing to pay the delivery or service fees, and 26% (a projected 27 million people) say they eschew the channel because ordering via aggregator is too expensive.

High prices are not the only factor driving consumers away from ordering via an aggregator. A lack of trust impacts 24% of restaurant customers who do not use aggregators, and 35% prefer ordering through more direct channels, such as over the phone or on restaurants’ websites.

FIGURE 5:
Why some restaurant customers steer clear of aggregators



Source: PYMNTS.com | Paytronix
Restaurant Friction Index

REWARDING

REWARDING LOYALTY:

Another type of restaurant innovation

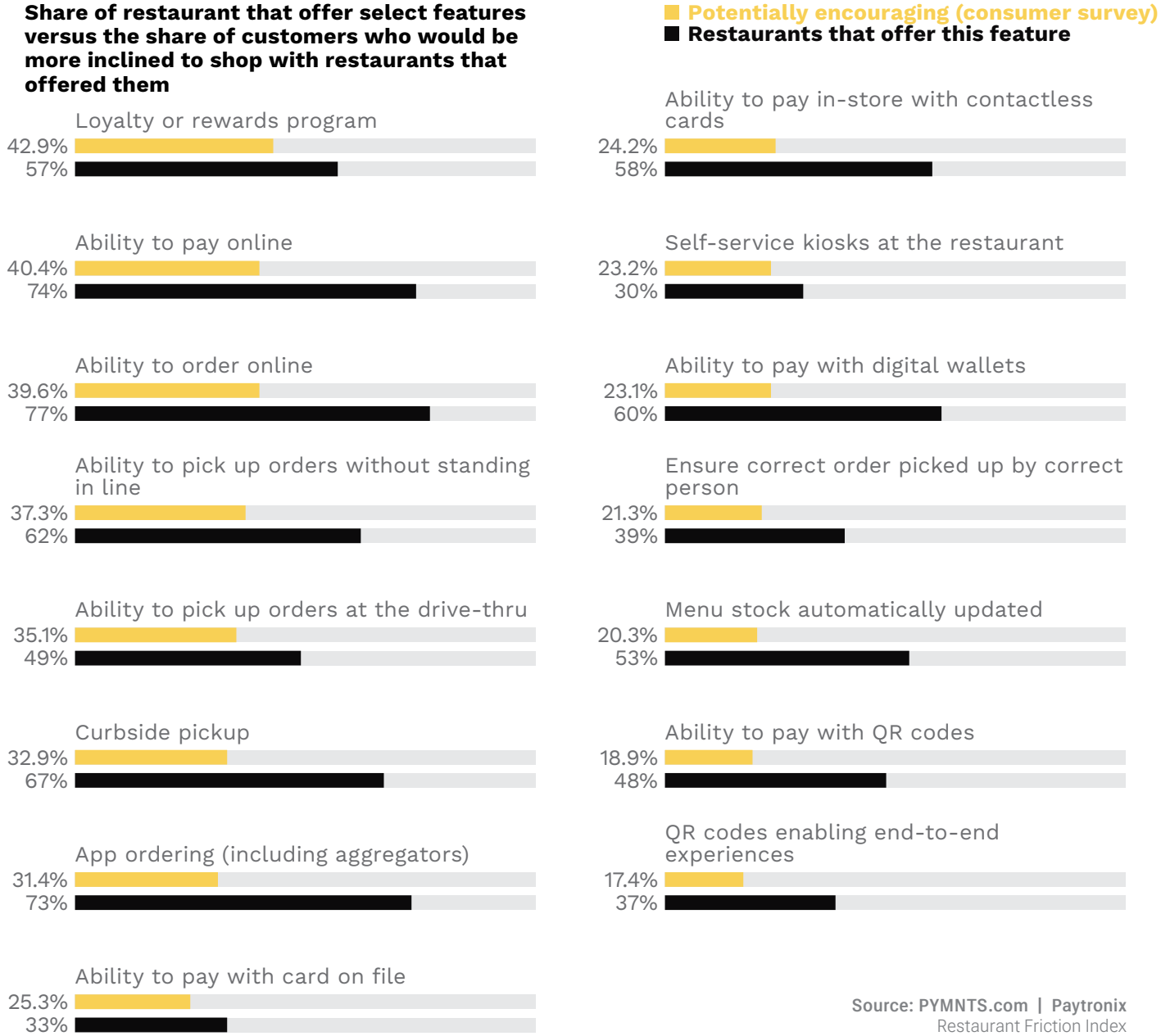
Nearly all restaurant managers realize that their customers are on the hunt for better deals and provide a way for regular customers to avoid high price tags: Loyalty and rewards programs. Our research shows that 96% of restaurant managers mark down prices for loyalty program members, and the average loyalty discount clocks in at roughly 3.8%. In other words, the average restaurant prices items 3.8% lower for for members ordering through loyalty program channels than for customers ordering on its website.

LOYALTY

FIGURE 6:

Features at restaurants

Share of restaurant that offer select features versus the share of customers who would be more inclined to shop with restaurants that offered them



Source: PYMNTS.com | Paytronix Restaurant Friction Index

Offering loyalty discounts like these can drive sales: 43% of consumers (an estimated 75 million people) say loyalty programs would encourage them to purchase from restaurants — more any other ordering feature.

The ability to pay and order online, pick up orders without standing in line and pick up orders via drive-thru and curbside pickup are the other key features consumers say would encourage them to purchase from restaurants. Our survey found that 37% of consumers would be more inclined to order from restaurants that allowed them to pick up their orders without standing in line. Similar shares would be more likely to order from restaurants from which they could pick up their food at the drive-thru (35%) or via curbside pickup (33%).

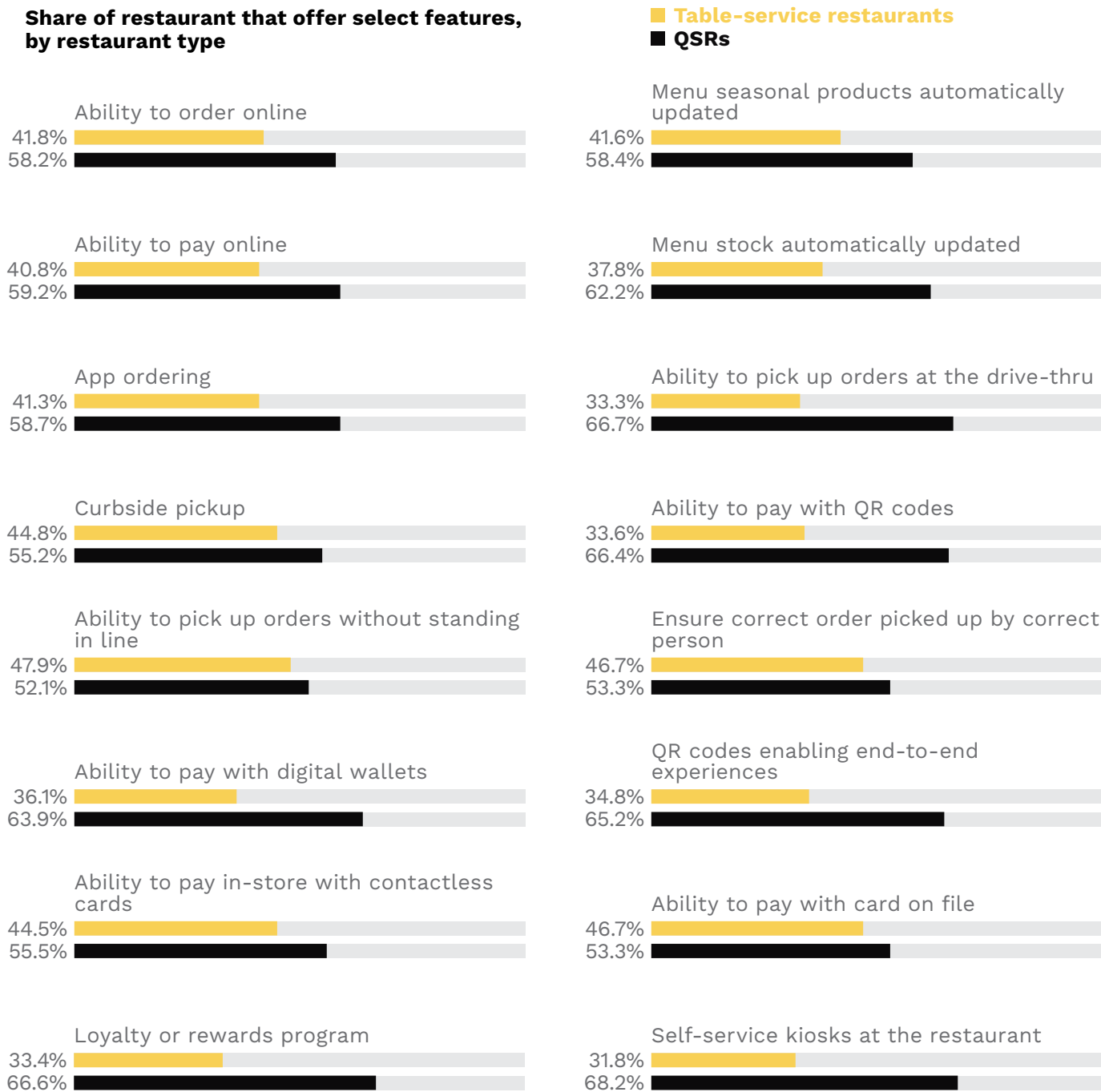


QSRs are ahead of table-service restaurants when it comes to delivering these and many more features that customers say will entice them to place more orders. QSRs are 99% more likely than sit-down restaurants to allow their customers to pick up online orders at drive-thrus, for example. They also are 77% and 42% more likely to allow customers to pay using digital wallets and order via app, respectively.

QSRs also are twice as likely as table-service restaurants to provide loyalty and rewards programs, with 67% doing so. This means just 33% of table-service restaurants do the same. QSRs’ multi-pronged approach to innovation sets them apart as some of the most innovation-ready restaurants in the business.

FIGURE 7:
Features offered by different restaurant types

Share of restaurant that offer select features, by restaurant type



Source: PYMNTS.com | Paytronix
Restaurant Friction Index

FROM TOP

FROM TOP TO BOTTOM (PERFORMERS):

Delivering seamless order experiences

Many digital features have become industry standards, but our research reveals that many restaurants have a long way to go before delivering the type of seamless cross-channel ordering experiences their customers have come to expect. The average restaurant scores just 39.8 out of 100 possible points on our RFI, illustrating that placing restaurant orders can be a frustrating and friction-laden experience for most restaurant customers.

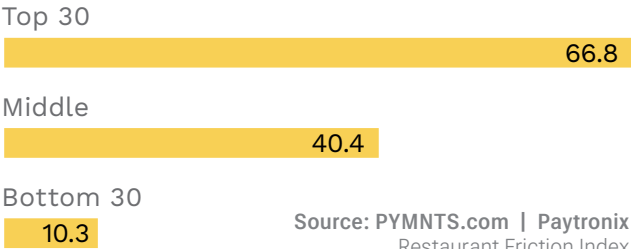
TO BOTTOM

FIGURE 8:
Restaurants' RFI scores

Average Index scores of restaurants, by performance tier



A considerable degree of variability exists in the quality and seamlessness of restaurants' ordering experiences. Top performers — the 30 restaurants with the highest RFI scores — earn nearly twice as many Index points as the average restaurant, 66.8 versus 39.8. This means the ordering experiences that top performers provide their customers are roughly twice as seamless as those provided by the average restaurant.



The secret to top performers' success lies in the diversity and variety of their feature offerings. They are more likely than middle and bottom performers to offer every ordering feature we studied. The feature gap between the best and the rest is largest around loyalty offerings. Our data shows that 97% of top performers offer loyalty logins for online purchases, while no bottom performers offer them.

FIGURE 9:
Feature offering variance

Share of restaurants offering select features,
by performance tier



Top performers are ahead of the pack not just with offering loyalty programs; they lead when it comes to offering all the features our research shows can boost restaurants’ chances to drive sales. These include order online, pay in-store, digital wallets and promotional offers.

Other restaurants are beginning to realize how much their customers demand digital ordering features and are investing in expanding their loyalty offerings in the future, though most are a long

way away from rivaling top performers on this count. Our research shows that 58% of restaurants currently allow their customers to pay with contactless cards in-store, for example, but 34% plan to adopt in-store contactless card options in the future. Similar patterns are found regarding restaurants’ plans to adopt digital wallets, drive-thru pickup, automatic menu updates and more.



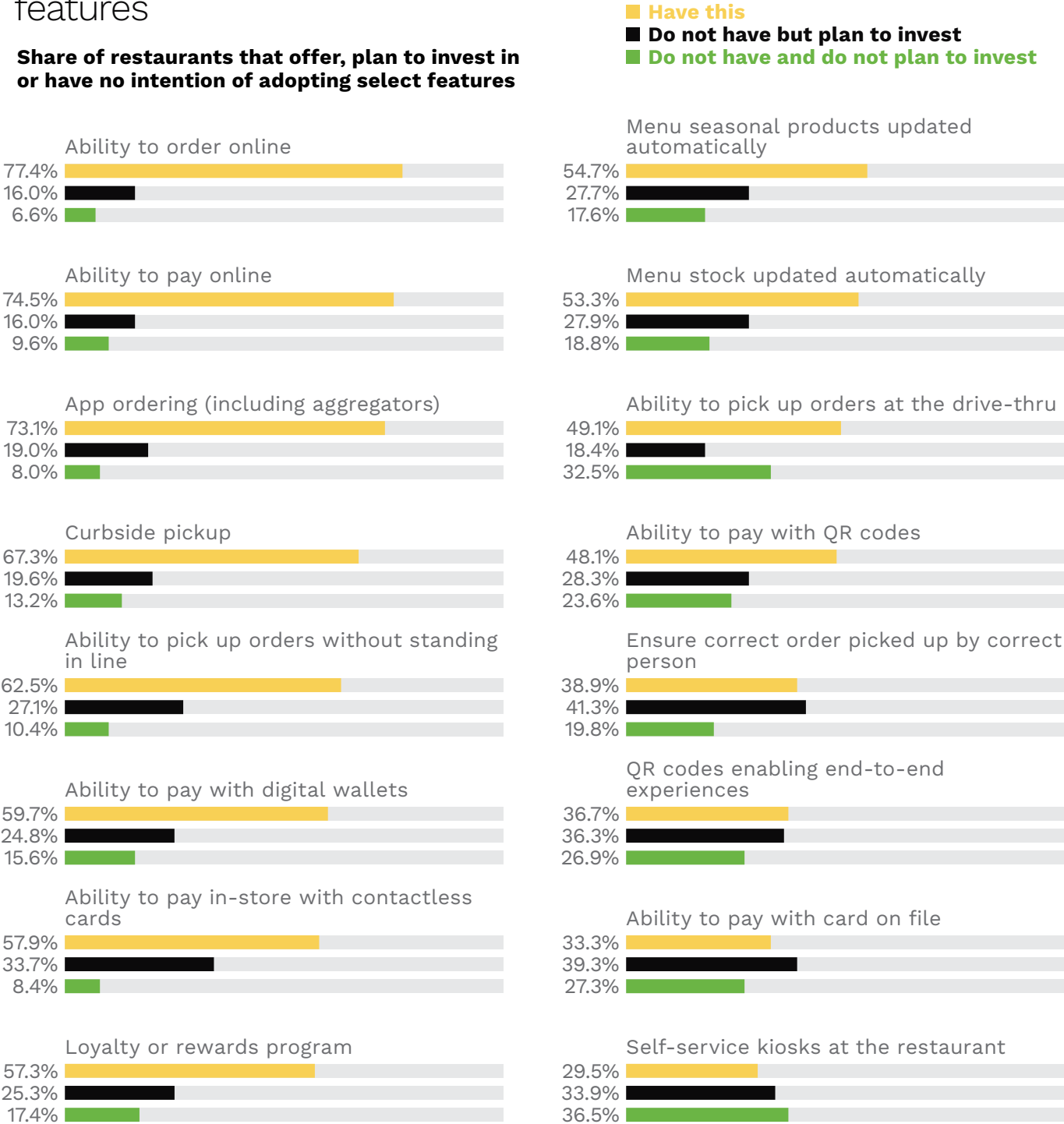
Loyalty programs are also on many restaurants’ innovation agendas. Just 57% of all restaurants currently offer loyalty and rewards programs, but another 25% plan to invest in them in the next three years. It is therefore clear that

investments in loyalty programs, along with other key digital ordering features, are poised to play a crucial role in restaurants’ customer engagement strategies in the future.

INTEGRATED DIGITAL ORDERING AND PAYMENT OPTIONS ARE NO LONGER COMPETITIVE DIFFERENTIATORS BUT RATHER FOUNDATIONAL TO THE RESTAURANT BUSINESS.

FIGURE 10:
Restaurants' plans for future features

Share of restaurants that offer, plan to invest in or have no intention of adopting select features



Source: PYMNTS.com | Paytronix
Restaurant Friction Index

CUSTOMER

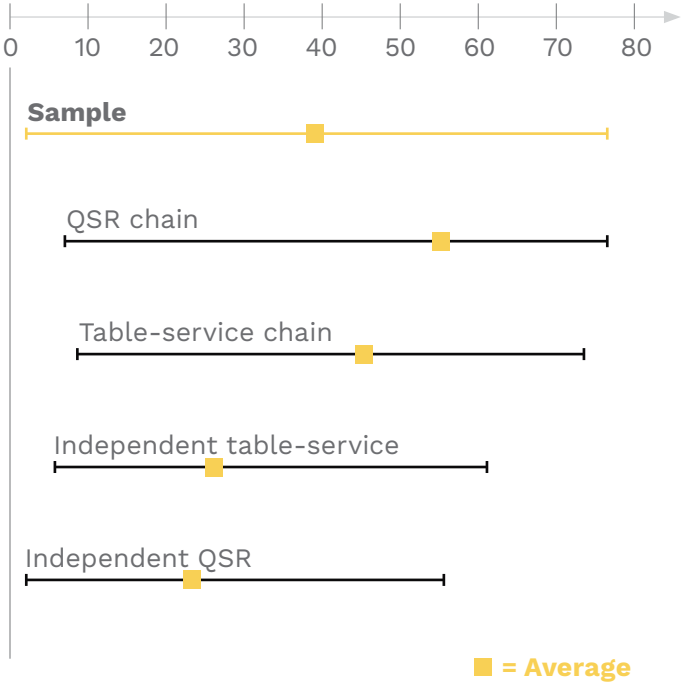
THE SECRET TO CUSTOMER SATISFACTION:

What chain restaurants get right about ordering features

Chain restaurants consistently outperform independent restaurants when delivering the seamless ordering experiences their customers expect, and they earn an RFI score of 56.7: 43% higher than average. Chain table-service restaurants are a distant second, earning an average RFI score of 46.4.

FIGURE 11:
RFI score variance by restaurant type

Index score ranges seen among restaurants of different types



■ = Average

Source: PYMNTS.com | Paytronix Restaurant Friction Index

Both independent QSRs and independent table-service restaurants score far below average on our RFI, earning average scores of 23.6 and 26.5, respectively. These scores indicate that independent restaurants' ordering experiences are far more friction-laden than their chain counterparts, a problem that could put them at a competitive disadvantage.

Several key factors hold independent restaurants back from providing the seamless service that has become standard fare among chain restaurants, and a shortage of feature offerings is chief among them.

SATISFACTION

FIGURE 12:
Feature offering variance among
different restaurant types

Share of restaurants offering select features,
by restaurant type



Independent restaurants are less likely than chain restaurants to offer every ordering feature we studied, with one noticeable exception: loyalty and rewards points that customers access via social media. Twenty-five percent of independent QSRs provide loyalty and rewards programs that their customers can access on social media, but these social media-based rewards programs are virtually nonexistent outside of this niche segment of the restaurant industry.

Every other type of loyalty feature — and every other type of digital ordering feature, for that matter — is more commonly found among chain restaurants than independent ones.

INNOVATION

INNOVATION PAYS:

How digital innovation boosts restaurant confidence

The events of 2020 undeniably caused a watershed moment for restaurant innovation. Record numbers of restaurants have brought new digital services to market since then, and those restaurants that did are far more confident about their futures than the rest.

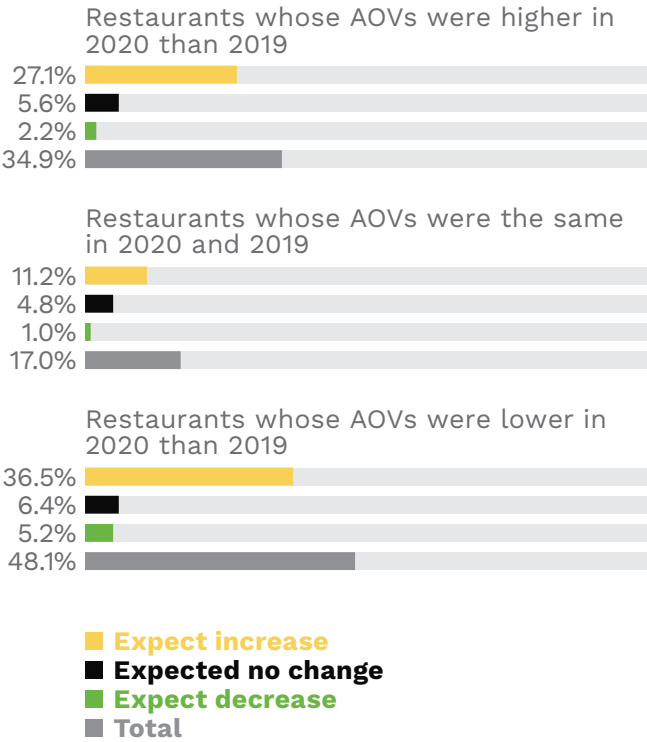
Restaurants were generally optimistic about the future by the end of 2020: 75% of them expected their AOVs to continue to increase from 2020 into 2021.

PAYS

In an unexpected twist, restaurants that saw their AOVs decrease in 2020 had a rosier vision of their futures than those whose AOVs increased or went unchanged: 37% of that former group expected those AOVs to increase in 2021.

The biggest indicator of restaurants' confidence in 2021 was not their 2020 performance but rather their innovation activity. Restaurants that implemented digital ordering capabilities were the most optimistic, whether 2020 brought them higher, lower or unchanged AOVs. Among restaurants that implemented either digital features or loyalty features, 77% expected 2021 to bring in higher AOVs than in 2020, exceeding the optimistic 69% of those who did not.

FIGURE 13:
Expected AOV changes in 2021
Share of restaurant managers who expected their 2021 AOVs to increase, by 2020 AOV development

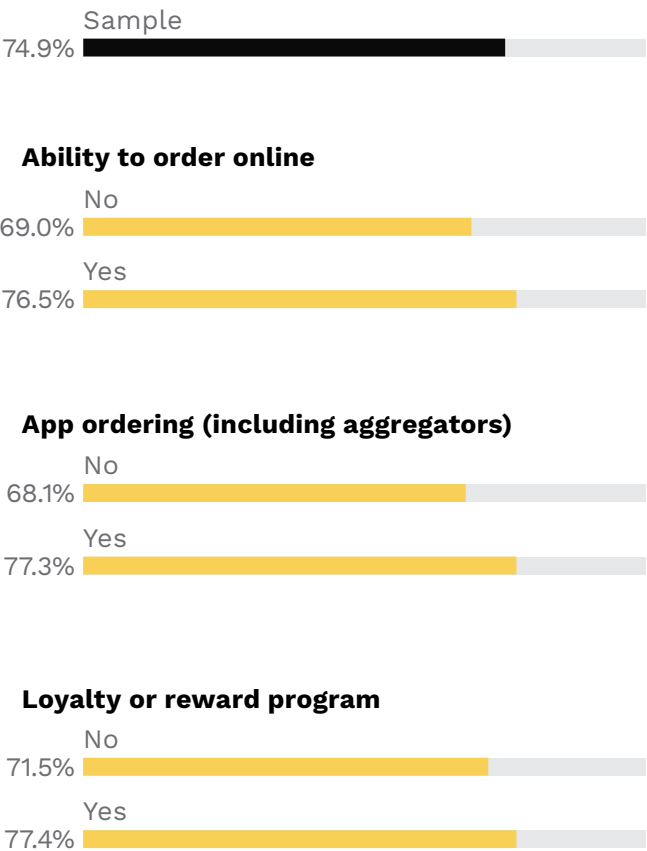


Source: PYMNTS.com | Paytronix
Restaurant Friction Index



FIGURE 14:
Prior feature adoptions'
impact on restaurant
managers' 2021 predictions

Share of restaurant managers who expected their 2021 AOV to increase, by the features they implemented in 2020



Restaurants that expanded their loyalty offerings in 2020 enjoyed a similar confidence boost that year, with 77% of them expressing optimism about how 2021 might impact their AOVs. By comparison, 71% of those who did not expand their loyalty offerings shared the sentiment.

Seventy-seven percent of managers representing restaurants that provided app ordering options believed that their AOV would increase year over year in 2021, whereas 68% of those that did not said the same.

Source: PYMNTS.com | Paytronix
Restaurant Friction Index



CONCLUSION

Conclusion

The ways in which restaurants engage with their customers have rapidly and fundamentally shifted in the past two years. Now more than ever, restaurant customers demand options for how they place, pay for and receive their orders, and restaurant managers are adjusting their innovation agendas accordingly. Investments in cross-channel ordering features and integrated user experiences are not just important but are foundational to success in the restaurant industry — now and in the future.

Methodology

The 2022 Restaurant Friction Index, a PYMNTS and Paytronix collaboration, examines how consumers' increasing demand for digital-first ordering experiences are reshaping the U.S. restaurant industry. We surveyed 501 managers of quick-service restaurants (QSRs) and table-service restaurants from across the U.S. between Sept. 1 and Sept. 30, 2021 about ordering features they believe are key to their success in the digital-first restaurant ecosystem. Our analysts also cross-referenced a survey of 2,545 U.S. consumers conducted between Oct. 20 and Oct. 25 about how they order, pay for and acquire their orders, their preferences and the ordering features they value most, to gain a first-hand account of how well restaurants are meeting their expectations.

ABOUT

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PAYTRONIX

Paytronix provides software-as-a-service (SaaS) customer experience management (CXM) services for restaurants. Its portfolio includes loyalty, gift and email solutions for fast-casual, fast-food and quick-service restaurants. Once implemented, these can be used to help establishments elevate their brand profiles. Its offerings can also be used to generate data insights to help restaurants pinpoint opportunities to improve their operations and customer engagements. The company’s platform can integrate with many widely used restaurant POS systems. For more information, visit [paytronix.com](#).

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