

**STARBUCKS Mobil Order & Pay STUDY**

Survey completed April 28<sup>th</sup> - April 30<sup>th</sup>, May 13<sup>th</sup>, 2015

SURVEY DISTRIBUTION

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**No. of responses**

We hired a team of 14 “mystery shoppers” to revisit a set of Starbucks locations in the Portland/Beaverton area. Over three to four days, our team monitored the length of the line and counted the number of coffees being placed on the barista counter during the morning rush, between the hours of 8-10 am, in fifteen minute increments. Our team also counted the number of people who picked up an order without waiting in line, having ordered in advance using the Mobile Order & Pay App. In December of 2014, the same locations were visited to set a baseline for consumer traffic during the morning rush.

**No significant change in Volumes:** Our findings show no significant change in the volume of orders in the six months that have passed since the Mobile Order & Pay App was introduced. It’s possible our time frame may be too short to clearly see change in volume at this point. The study will be repeated a year after the introduction of Mobile Order & Pay App to evaluate change in volume further.

**Improved Efficiency during the morning rush:** There was significant change observed in the length of the line during the morning rush (8-10am). In December of 2014, the length of the line was classified as short, meaning under 5 people, 48% of the time. In 2015, it was observed to be short 65% of the time, or a 17% improvement in length of line. These findings indicate an increase in efficiency and time savings for both consumers and staff.

**Order Pay Share is picking up:** In order to assess the share of orders coming through the App, our team counted the number of people picking up an order without waiting in line. We found approximately 10% of total orders currently coming through the Mobile Order & Pay App.

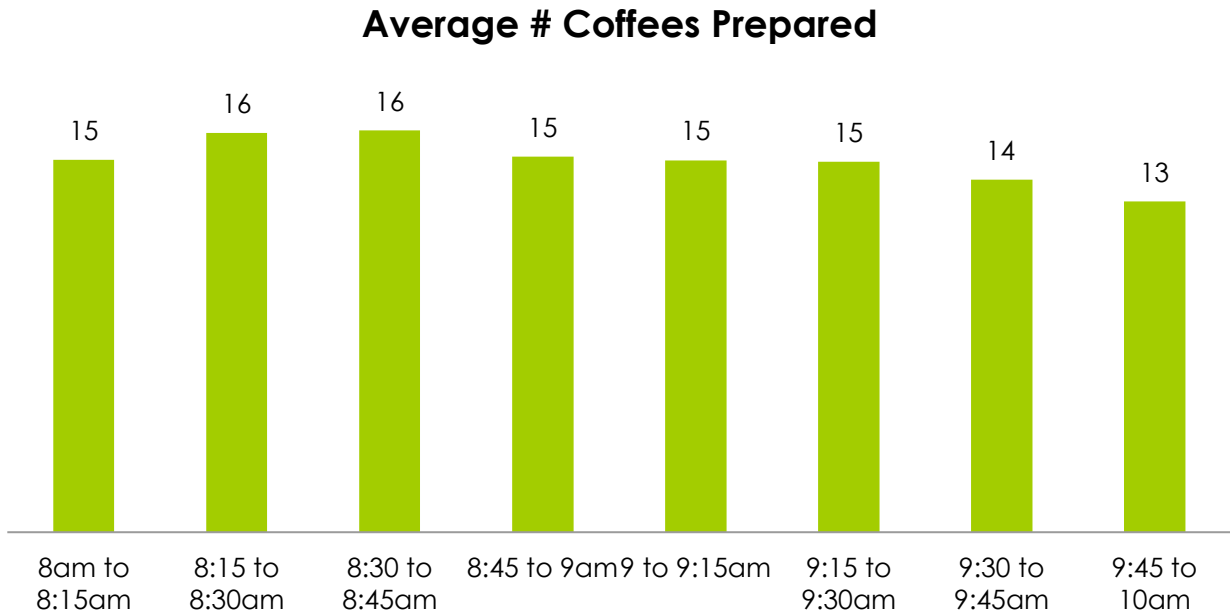
## Mystery Shopper Survey Locations

### Starbucks Location

1102 NW Lovejoy  
1211 SW 5th Ave  
14600 Sw Murray Scholls Dr Ste 107  
16005 sw walker road  
1972 W Burnside #2  
2834 SE 82nd Portland  
525 NE Grand Ave  
700 sw 5th  
8400 SW Nimbus #120  
925 Lloyd Center  
1510 NE Broadway St Portland, OR  
12518 NE Airport Way, Portland, OR  
2328 W. Burnside, Suite #2, Portland, OR  
Umpqua Plaza, 1 Columbia St  
700 sw 5th

## MYSTERY SHOPPER SURVEY: QUESTION 1

Our mystery shoppers counted the number of coffees prepared and placed on the barista's bar between 8am and 10am, in 15 minute increments, at specific Starbucks locations in the Portland/Beaverton area. Our team performed this survey over a 2 or 3 day period, and we averaged those results.



**Average # of Coffees Prepared by Location**

Starbucks Location	8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM
	to 8:15 AM	to 8:30 AM	to 8:45 AM	to 9:00 AM	to 9:15 AM	to 9:30 AM	to 9:45 AM	to 10:00 AM
1012 nw 21st	19	22	23	24	15	21	13	19
1039 NW couch street	25	27	22	27	29	25	19	15
1102 NW Lovejoy	27	23	19	17	10	11	7	13
1211 SW 5th Ave	17	21	20	22	24	22	24	23
14600 Sw Murray Scholls Dr Ste 107	11	16	13	15	14	9	14	11
16005 sw walker road	6	5	10	10	11	12	7	8
1972 W Burnside #2	15	16	15	11	12	9	8	10
2834 SE 82nd Portland	7	7	9	6	11	5	4	11
525 NE Grand Ave	9	19	29	17	28	29	25	21
700 sw 5th	12	15	11	6	9	8	3	3
8400 SW Nimbus #120	17	23	17	16	16	18	28	21
925 Lloyd Center	17	15	13	18	16	12	15	12
1510 NE Broadway St Portland, OR	10	9	13	9	7	7	6	5
12518 NE Airport Way, Portland, OR	20	11	13	14	9	10	10	8
2328 W. Burnside, Suite #2, Portland, OR	13	14	14	11	12	17	19	21
Umpqua Plaza, 1 Columbia St	18	15	17	19	17	20	23	12
700 sw 5th	12	15	11	6	9	8	3	3
<b>Grand Total</b>	<b>15</b>	<b>16</b>	<b>16</b>	<b>15</b>	<b>15</b>	<b>15</b>	<b>14</b>	<b>13</b>

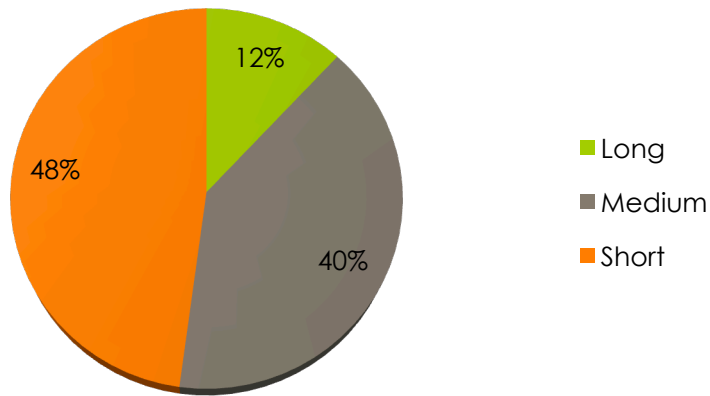
**Percent Change in Total Morning Average**

	<b>Total Avg 12.14</b>	<b>Total Avg 4.15</b>	<b>Percent Change</b>
<b>Umpqua Plaza, 1 SW Columbia St</b>	110	140	28%
<b>1972 W Burnside St</b>	111	96	-14%
<b>Uptown Shopping Center, 2328 W Burnside St</b>	98	121	24%
<b>2834 SE 82nd Ave.</b>	80	63	-21%
<b>525 NE Grand Avenue</b>	123	175	42%
<b>925 Lloyd Center</b>	164	117	-28%
<b>700 SW 5th</b>	103	65	-37%
<b>12518 NE Airport Way</b>	99	93	-5%
<b>14600 Sw Murray Scholls Dr Ste 107</b>	146	102	-30%
<b>8400 Sw Nimbus Ave #120</b>	157	143	10%
<b>16005 Sw Walker Rd</b>	112	69	-39%
<b>1102 NW Lovejoy Street</b>	121	149	23%
<b>1211 S.W. 5th Avenue</b>	145	174	20%
<b>Total</b>	121	116	-4%

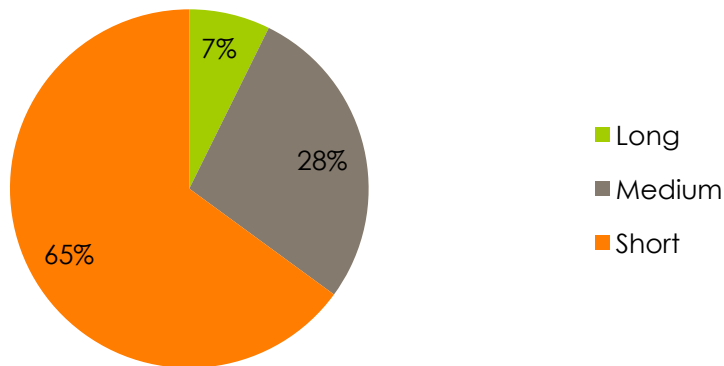
**Length of Line December 2014 vs. May 2015**

	<b>Long</b>	<b>Medium</b>	<b>Short</b>
<b>Line Length 2014</b>	12%	40%	48%
<b>Line Length 2015</b>	7%	28%	65%

**Line Length - December 2014**



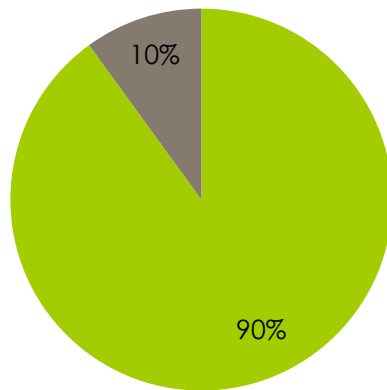
**Line Length - May 2015**



**Morning Order by App vs Regular Order**

Order Type	Count
Regular Order	112
Mobile Order & Pay Order	12
<b>% Orders coming via App</b>	<b>10%</b>

**Order Type**



- Regular Order
- Mobile Order & Pay Order

MYSTERY SHOPPER SURVEY: QUESTION 2

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**What % of orders comes through the Mobile Order & Pay App?**

**Sample Comments:**

- A small number of people use it compared to the people who go through the line, maybe 10%. More people use it to preorder food.
- For it only being a recent app, it's already quite common and customers seem to know about it. Starbucks staff is surprised how popular it is, making up 10-15% of total orders.
- People are using the app but not as many as expected, may take some time for people to get used to ordering before coming.
- The App is very popular amongst their customers. It's great for people who don't have time to waste.
- About 10%
- Quite a few people use it, maybe 10-20%. It does save time for everyone.
- Mobile Pay has been picking up recently, currently represent 5 -10% of orders.