

A large, faint graphic in the background consists of three concentric circles and several intersecting lines, creating a complex geometric pattern.

# The Long-Term Case For Smarter Tech Investment

**2025 & Beyond  
in Hospitality**

Produced by Tech on Toast  
in collaboration with Square

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Bread Ahead, London

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Ezra and Gil, Manchester



# Introduction: Modernising Hospitality

The hospitality industry is at a pivotal crossroads. Faced with rising costs, unpredictable trading conditions, and rapidly evolving guest expectations, operators are under pressure like never before.

Technology has the potential to transform this environment, boosting efficiency, empowering teams and enabling seamless guest experiences. Yet the reality on the ground paints a different picture.

Many operators are stuck with outdated systems, juggling disconnected platforms that hinder more than help. Staff struggle with clunky interfaces. Management lack visibility across venues. Guests notice the cracks in the experience. And crucially, businesses hesitate to make changes because the process of switching tech is seen as daunting, disruptive and expensive.

This new research explores these challenges in depth and offers actionable insights on how hospitality leaders can overcome them, with the right strategy and the right technology partners.

# Why We Created This New Research With Square

## Why

Hospitality has always been about people. It's the welcome, the warmth, the experience. But behind the scenes, it's also about systems, and right now, too many of those systems are holding operators back.

At Tech on Toast, we spend every day speaking with hospitality leaders from independents to multi-site operators and the message is loud and clear: tech should make life easier, not harder. Yet far too often, it does the opposite. We see teams bogged down by clunky systems, disconnected platforms, and a fear of switching because change feels complicated and risky.

That's why we partnered with Square to dig deeper.

## What

This research is not just a snapshot—it's a mirror. A reflection of where we are as an industry when it comes to people, process, and platforms. It's honest. Sometimes uncomfortable. But absolutely necessary.

## Our Goal Is Simple

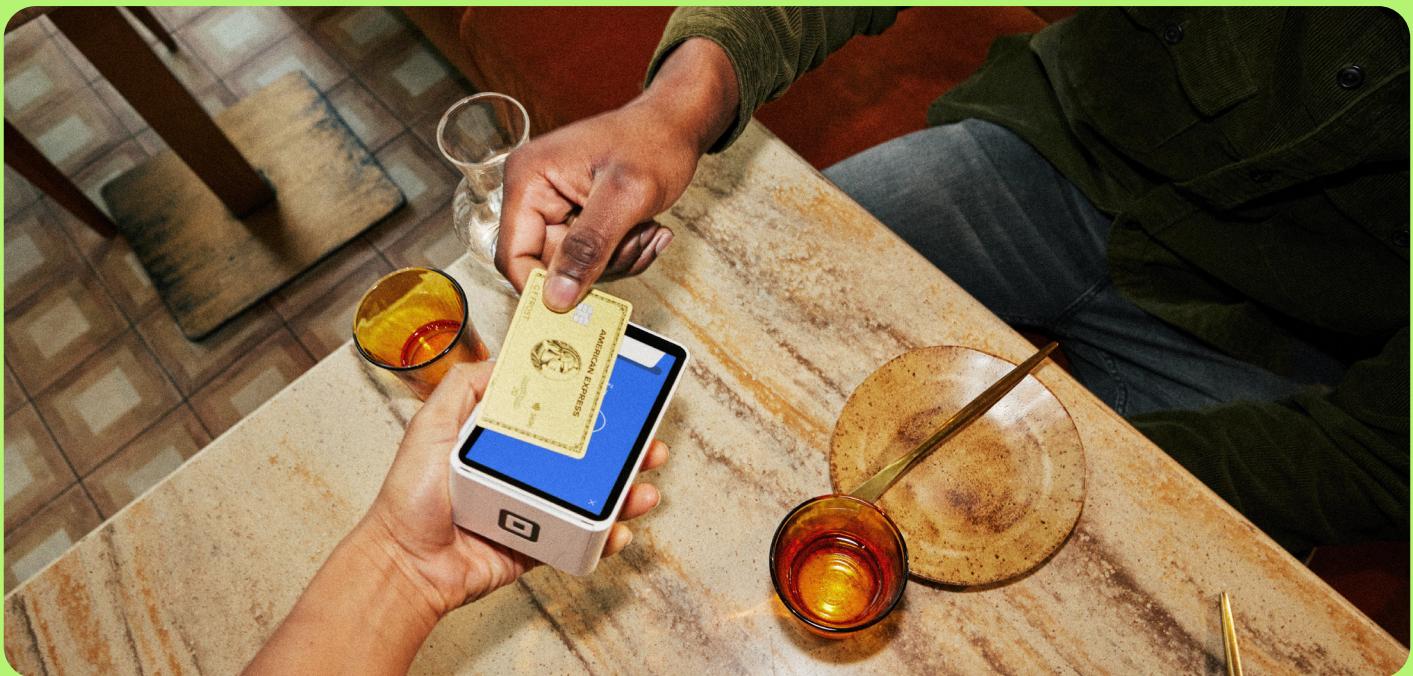
To empower operators with clarity and confidence. To help you stop reacting and start building a future-fit hospitality business, where tech supports your team, streamlines your ops, and creates better guest experiences.

Whether you're just starting to assess your stack or you're already deep into digital transformation, we hope this report gives you the insight and the nudge you need. Because the future of hospitality isn't just about tech. It's about making tech work for people.



**Chris Fletcher**  
Founder & CEO, Tech on Toast





Kitten, Manchester

“

At Square we are hyper-focused on understanding the restaurant and hospitality industry and continuing to supercharge its growth by being the best digital partner we can be. This is why our partnership with Tech on Toast is so important.

Broadly speaking, we see the outlook for restaurants in the UK as positive, with people choosing to dine out more than last year. But there are certain factors for restaurant owners to consider as they continue to navigate economic headwinds.

We know that most food and beverage businesses are optimistic about the future of their business, with plans for growth and expansion, but they need to prioritise evolving customer habits and tap into the needs of different demographics to continue surviving against rising costs of food, supplies, energy and staff.



**Matthew Gillet**

Head of UK Business, Square UK

 Square

# This research explores:

**State Of The Nation**

**Why Operators Delay – And What It Costs**

**What Operators Actually Want**

**Breaking The Barriers**

# Research Methodology

To understand the state of tech adoption in hospitality, Tech on Toast and Square surveyed and interviewed over 150 hospitality leaders across the UK. Respondents ranged from independent operators, multi-site group managers and founders. The findings shared here reflect both qualitative feedback and quantitative analysis, uncovering the root causes of dissatisfaction and identifying the most effective strategies for long-term tech success.

(1) Who was surveyed.

**150 Hospitality leaders**

(3) What part of the industry

**Hotels, QRS, Pubs, Casual Dining.**

(2) What type of research was carried out.

**Qualitative feedback & quantitative analysis**

(4) What did we uncover

**The research identifies strategies for tech success**

# Insights, Challenges, & Actionable Strategies For Industry Leaders

SECTION 01

# State Of The Nation

# Operators Are Dissatisfied With Their Current Tech

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When tech gets in the way of service, it's not doing its job.



**Mitz Patel**  
IT Director, Prezzo

**Only 18% Would Recommend Their Current Tech Systems**

## NPS Research

In most industries, a healthy NPS sits between +30 to +50. In contrast, our research shows that the average NPS score for hospitality tech sits at -37, indicating that the vast majority of hospitality operators wouldn't advocate for the systems they're currently using. These systems are failing to deliver real value. They're hard to use, slow to integrate and often completely out of step with what teams need on the ground.

## SECTION 02

# Why Operators Delay – And What It Costs

# 94% Only Adopt Tech When Absolutely Necessary

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Tech should not be treated as an expense. Tech is a tool to make all departments more efficient, growing your business.



**William Connors**

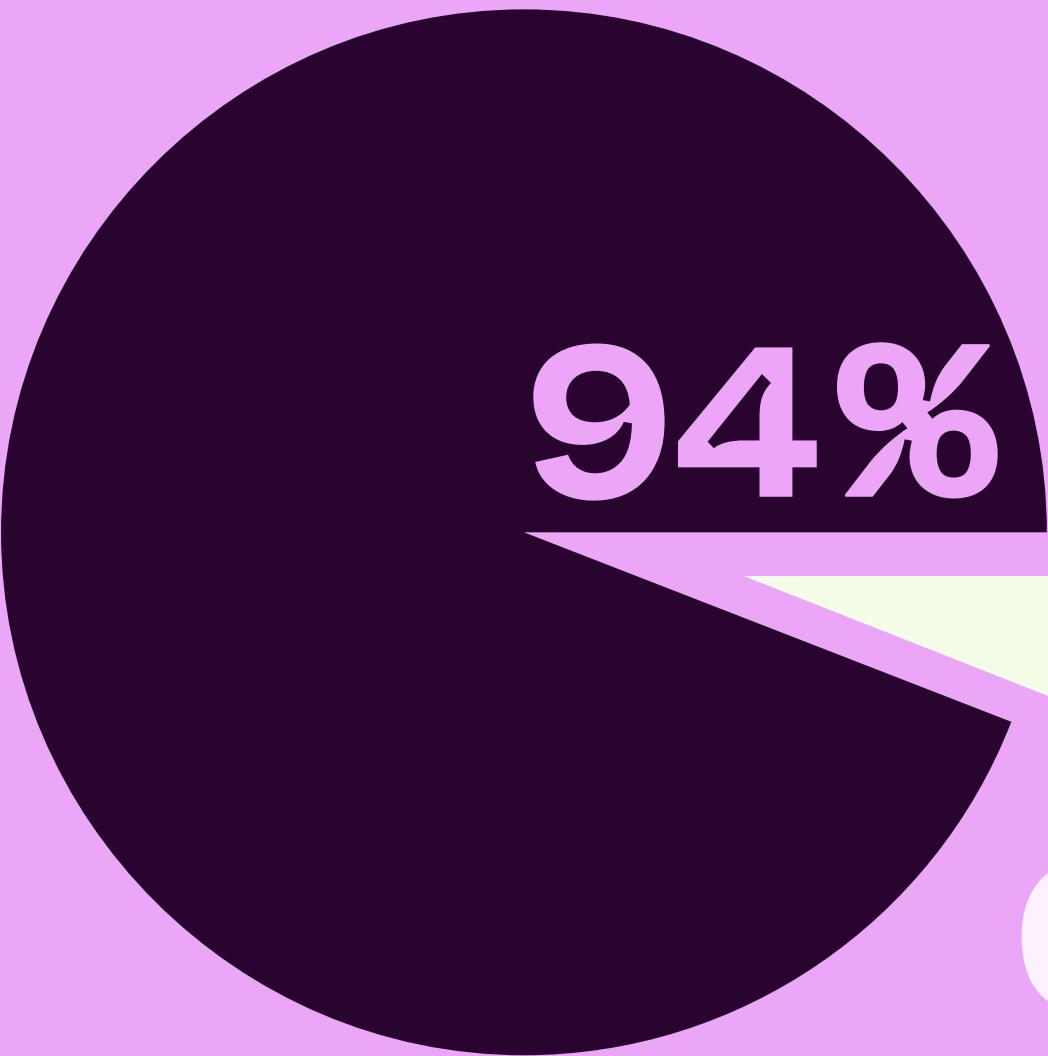
Formerly  
Wingstop & Noble  
Restaurant Group

(1)

**94% only adopt tech when absolutely necessary**

(2)

**94% only adopt tech when absolutely necessary**



**94%**



**6%**

“

# Don't wait until it breaks.”



Ezra and Gil, Manchester

**Commentary:**

While many hospitality leaders know their systems aren't fit for purpose, the perceived pain of switching is often greater than the benefits. Concerns over training, downtime and potential dips in service quality lead to paralysis.

**The Result?**

Businesses remain locked into outdated systems that actively hold them back. The irony is clear: by avoiding short-term disruption, they're prolonging long-term inefficiencies. Leaders must begin to reframe tech investment as a strategic enabler, not a necessary evil.

## SECTION 03

# What Operators Actually Want

# What Matters Most When Choosing New Technology?

## Real-World Example:

Bread Ahead shared that they used Square to roll out a new POS system across three venues in under 48 hours...

## Commentary:

When asked what matters most in choosing new tech, operators consistently prioritised ease of use and seamless integration—far above cost or even functionality. This reflects a growing understanding that tech must fit the business, not force the business to adapt. Systems need to be intuitive for every level of the team—from front of house to back office—and they must integrate with existing platforms without friction. Time spent managing the tech is time lost with guests. Platforms like Square succeed because they streamline workflows, not complicate them.

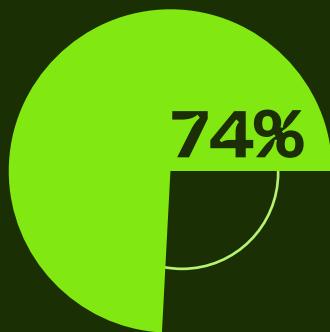
## Key Decision Drivers:

**74%: Ease of use**

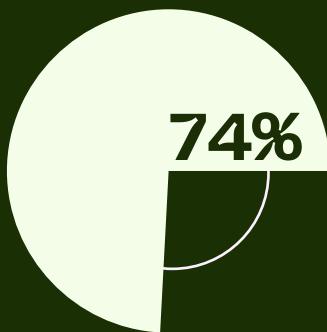
**74%: Integration with existing systems**

**61%: Cost**

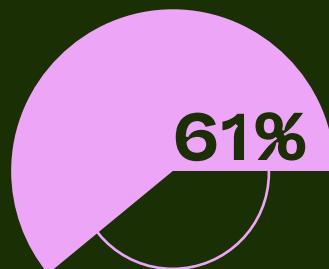
**58%: Customer experience**



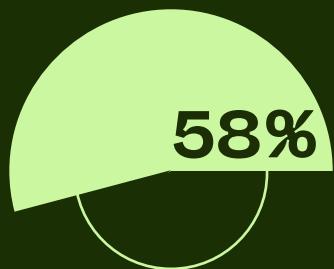
**Ease of use**



**Integration with existing systems**



**Cost**



**Customer experience**

SECTION 04

# Breaking The Barriers

## TOP 4 OBSTACLES

# The Biggest Barriers To Adopting New Technology

**36%**Cost & time  
of implementation**16%**Complexity  
of integration**23%**Staff resistance  
to change**16%**Unclear  
ROI**Insight:**

Adopting new technology often feels overwhelming but it doesn't have to be. Operators told us that lengthy implementation periods, unclear timelines and lack of vendor support are key reasons they hold back.

Staff resistance is another major hurdle, often driven by poor communication and insufficient training. But with the right approach, phased rollout, hands-on training and transparent communication, these barriers can be dismantled.

**The best tech feels like it's always been there.**

SECTION 05

# Measuring Success

# Top Metrics For Success

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When the right tech's running behind the scenes, your team can stop scrambling and start focusing on what really matters, delivering great service, keeping standards high, and boosting revenue. No more daily firefighting, just smoother shifts and happier guests.



**Sharon Vickers**

Head of Operations  
Lane 7

## How Are Hospitality Operators Measuring Success?

**74%**

**68%**

**52%**

**Increased Efficiency**

**Reduced Operational Errors**

**Staff Feedback**

### Commentary:

Operators are increasingly focused on people-first metrics. Staff satisfaction is the leading indicator of whether a tech rollout has been successful. If teams aren't using it, the system fails—no matter how advanced the features. Reduced errors and greater efficiency follow naturally when staff feel supported, trained and empowered. Hospitality runs on people. Technology's role is to amplify, not replace them.

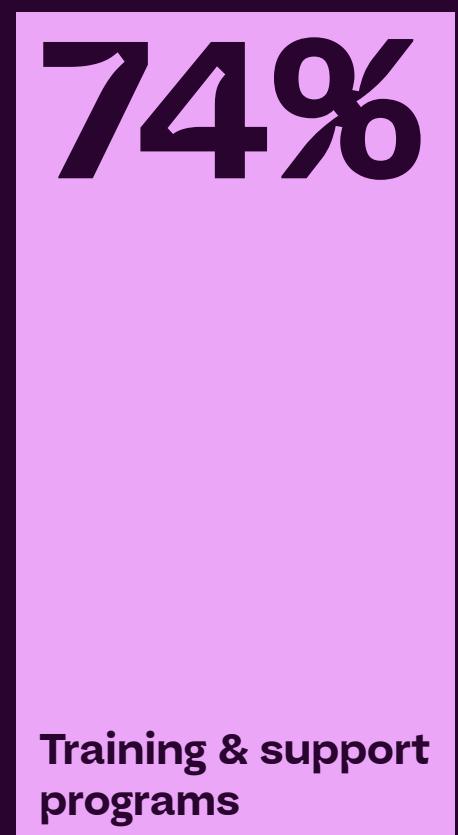
SECTION 06

# Strategies That Work

# Best Practice Tip:

- (1) Change doesn't happen overnight. The most successful operators take a phased, inclusive approach. They start by identifying clear goals, choosing user-friendly platforms and involving staff from day one. Regular check-ins, real-time feedback and ongoing training ensure long-term adoption and results.

**The lesson is simple:** Listen to and invest in your people and the right tech will follow.



## What Top Operators Do:

Work with Square and Tech on Toast to simplify your stack.

**SECTION 07**

# Conclusion: Turning Insight Into Action

# Insight Into Action

The findings from this report are clear: most hospitality operators are not happy with the technology they rely on and they know it. But knowing isn't enough. The time has come for action.

We've spoken to over 150 industry leaders and the message is consistent: Tech needs to be easier, faster, and more human. Operators aren't looking for complexity, they want platforms that work from day one, save time, and make their teams' lives easier.

No.	Actions	Q's
1	Audit your current tech stack.	What's causing friction? What's not being used? What's costing more than it returns?
2	Involve your team.	Ask your frontline staff where the pain points are. They'll give you honest answers.
3	Choose simplicity & speed over feature bloat.	A tool that works well and can be implemented without excessive resource and disruption. Build a phased rollout plan. Don't go all-in on day one. Start small, test, learn and expand.
4	Measure success based on outcomes, not usage.	Are you saving time? Reducing errors? Improving customer feedback? That's your benchmark.
5	Partner with the right providers.	Look for vendors who understand hospitality who offer onboarding, training and support that fits your rhythm.

# Tech Won't Replace People But It Will Empower Them



Vegan Shack, Manchester

Squareup Europe Ltd

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Square's integrated tools help me manage my restaurant from anywhere.

- Kitten, Manchester