



sky business

Connectivity Made Clear: Identifying Hidden Barriers in Hospitality

Produced by Tech on Toast
in partnership with Sky Business

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Introduction: Reframing Connectivity



Connectivity keeps modern hospitality moving. With cloud POS, mobile payments, QR menus and AI tools now standard, the network underpins every moment of service. But for too many operators, it remains the unseen weak point — only noticed when something goes wrong.

This report exposes the hidden barriers behind UK hospitality's connectivity challenges and offers a framework to build reliability into the heart of operations.

Why We Created This New Research With Sky Business

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 Sky Business 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



“

Hospitality's future will be built on connectivity that doesn't just keep businesses online, it keeps them ahead. This research signals a shift: networks are now the foundation for innovation, from AI-driven forecasting to personalised guest experiences. For Sky Business, the opportunity is clear, lead the industry in making connectivity a catalyst for transformation.

sky business

DIRECTOR OF HOSPITALITY

James Tweddle



This research explores:

Connectivity Confidence Is Fragile

Operators Lack Real-Time Visibility

When Issues Hit, Control Breaks Down

Downtime Disrupts Operations & Service

Security Confidence Remains Mixed

Hospitality Runs on Connected Systems

Guests Feel Connectivity Failures First

Operators Want Better Tools & Support

Reliable Connectivity Is Now a Competitive Edge

A Clear Path to a More Resilient Network

Research Methodology

This report is based on a structured quantitative survey of hospitality operators conducted in the UK. A total of 83 businesses participated, representing a mix of restaurants, bars, cafés, pubs, multi-site groups and independent operators.

How the Data Was Collected

Online survey distributed via email, industry partners and social channels.

Closed-ended questions (multiple choice, Likert scales, ranking questions) to ensure measurable, comparable results.

Operational scenario questions to understand behaviour during outages, downtime, and security incidents.

Tool and system-ranking exercises to identify which parts of the tech stack are most connectivity-dependent.

Data Analysis

Responses were **aggregated and analysed quantitatively**, with percentages rounded for clarity.

Patterns were grouped into thematic areas (confidence, visibility, operational impact, security, guest response, improvement priorities).

Narrative insights were developed by interpreting statistical trends and operator behaviours.

No weighting was applied due to the sample size and distribution.

Participant Profile

Mix of **single-site and multi-site** operators.

Roles included **owners, GMs, ops managers, IT leads and area managers**.

Sectors spanned **restaurants, pubs/bars, cafés, QSR, and mixed hospitality concepts**.

SECTION 01

State of the Nation

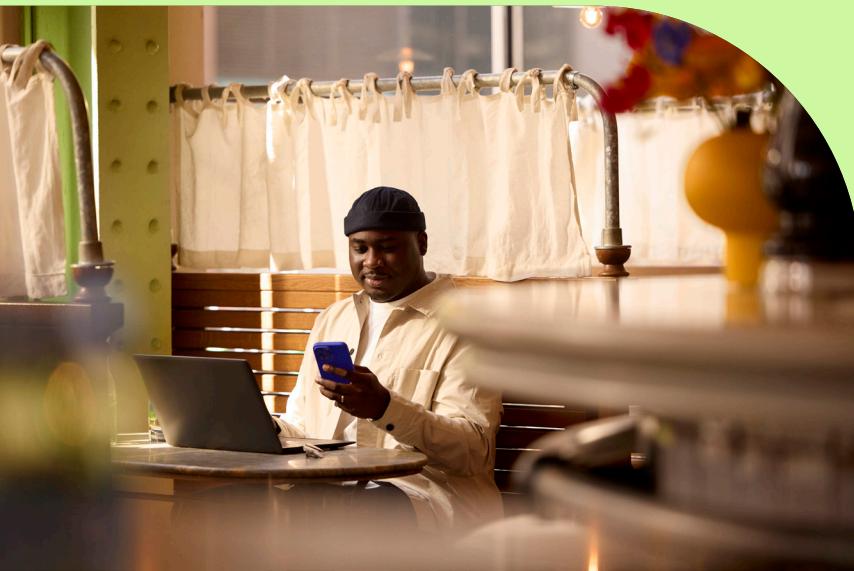
Connectivity confidence is fragile: and visibility remains low

The findings reveal a consistent mindset shift in progress: **from seeing connectivity as a background cost to recognising it as a strategic enabler.**

When **57% of operators have to revert to manual processes**, connectivity becomes a **P&L issue, not a technical one**. Downtime wastes labour, erodes guest trust and breaks the link between systems that drive efficiency.

Operators who treat connectivity as **infrastructure that is reviewed, monitored and measured** are best positioned to adopt the next generation of tools such as AI forecasting, IoT monitoring, energy optimisation and personalisation engines.

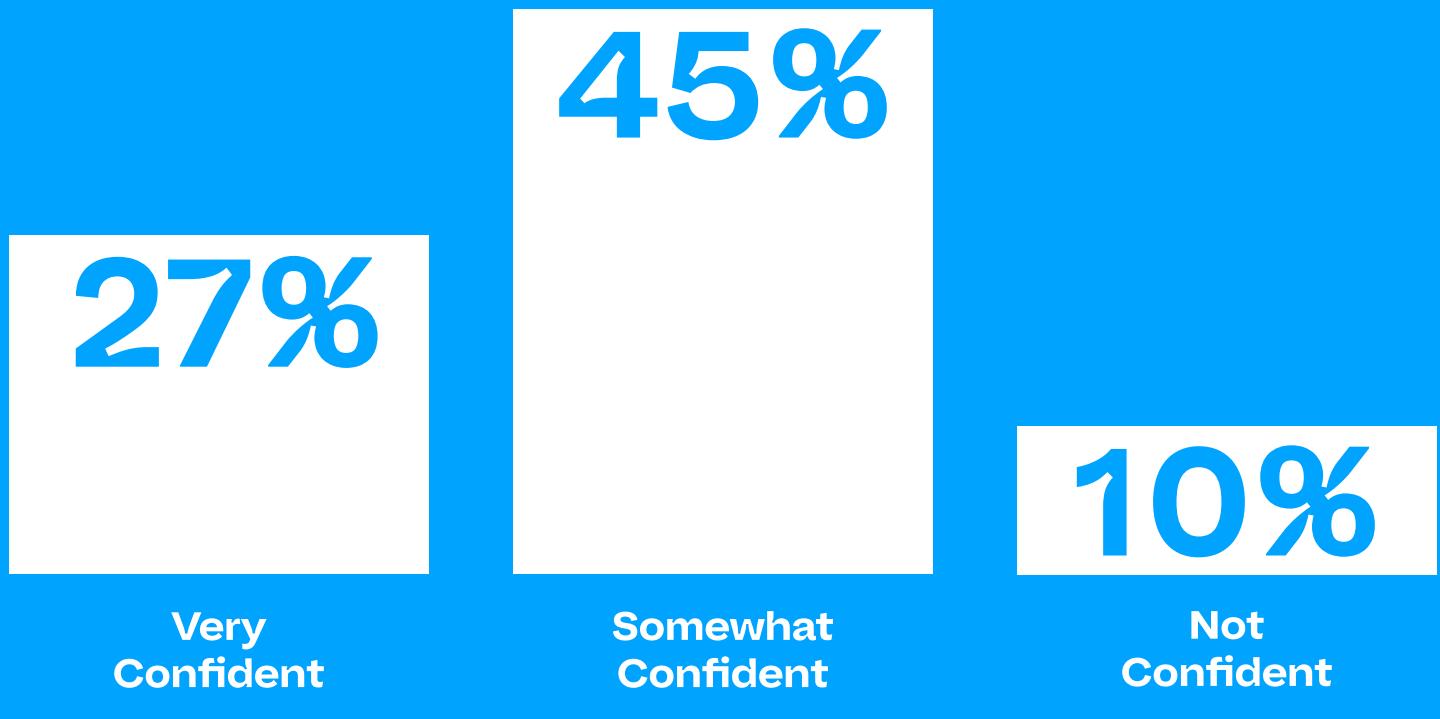
Connectivity is not just keeping you online; it is keeping you competitive.



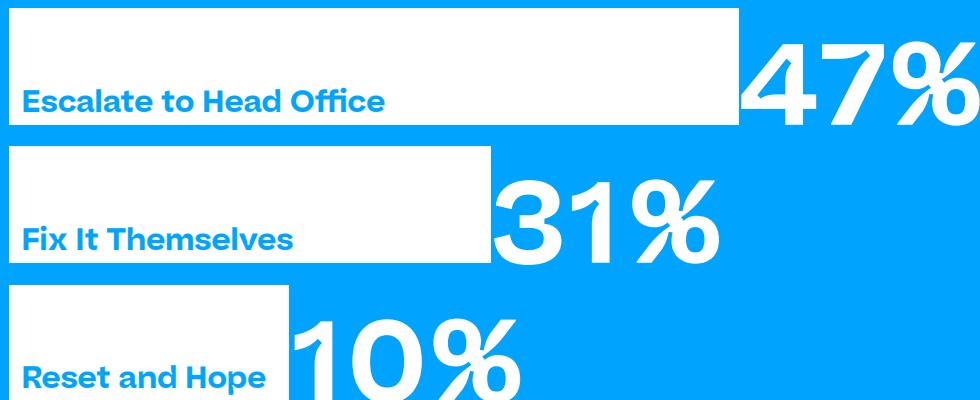


SECTION 02

Confidence and Control



Behavior when issues occur



Confidence in connectivity management is mixed. While **27% feel very confident**, nearly half (45%) describe themselves as somewhat confident. Around one in ten (10%) admit they are not very confident.

This cautious confidence extends to action. When issues occur, 47% escalate to head office or IT, 31% fix issues themselves, and **18% simply restart their router and hope for improvement**.

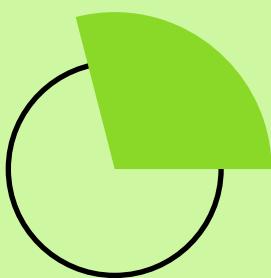
Conclusion: This reactive culture indicates a lack of network visibility and on-site tools. Operators are confident enough to respond but not equipped to diagnose root causes.

SECTION 03

Visibility: The Blind Spot

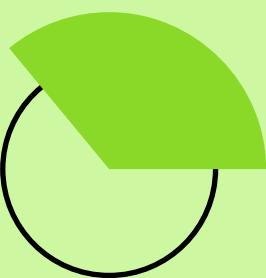
When asked how visible their network performance is:

29%



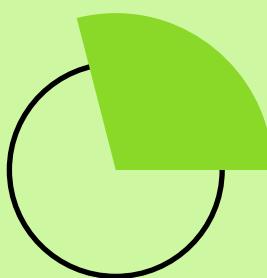
said visibility was very clear and visible

36%



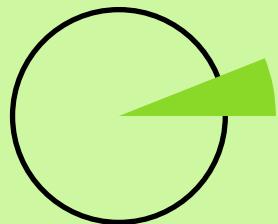
had some visibility such as basic router data

29%



said visibility was limited

6%



had none at all



Two-thirds of operators lack real-time visibility, leaving downtime unmeasured and accountability unclear. Without observability, operators cannot quantify downtime or hold suppliers to account.

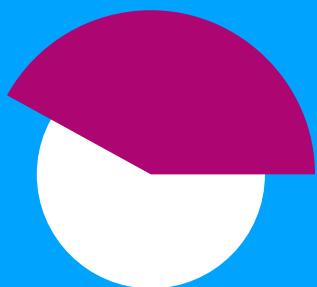




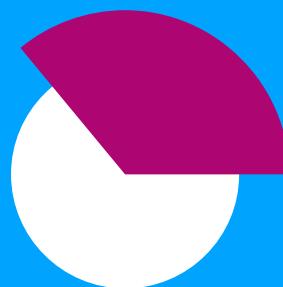
SECTION 04

When the Connection Drops

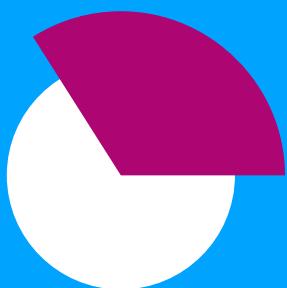
Impact Highlights Lowlights



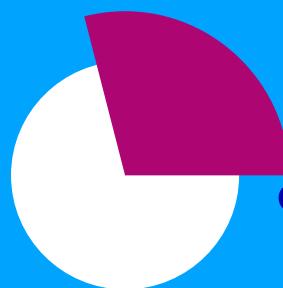
42%
Till/POS
Disruption



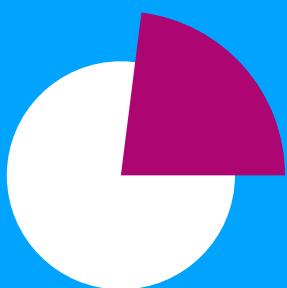
36%
Service
Delays



34%
Staff
Inefficiency



29%
Communication
Failures



23%
Guest
Complaints

“Outsmart the Outage



Commentary:

Even 15 minutes offline during peak service has a multiplier effect: slower payments, pressure on staff, and guest frustration.

The Result?

A short outage doesn't stay small.

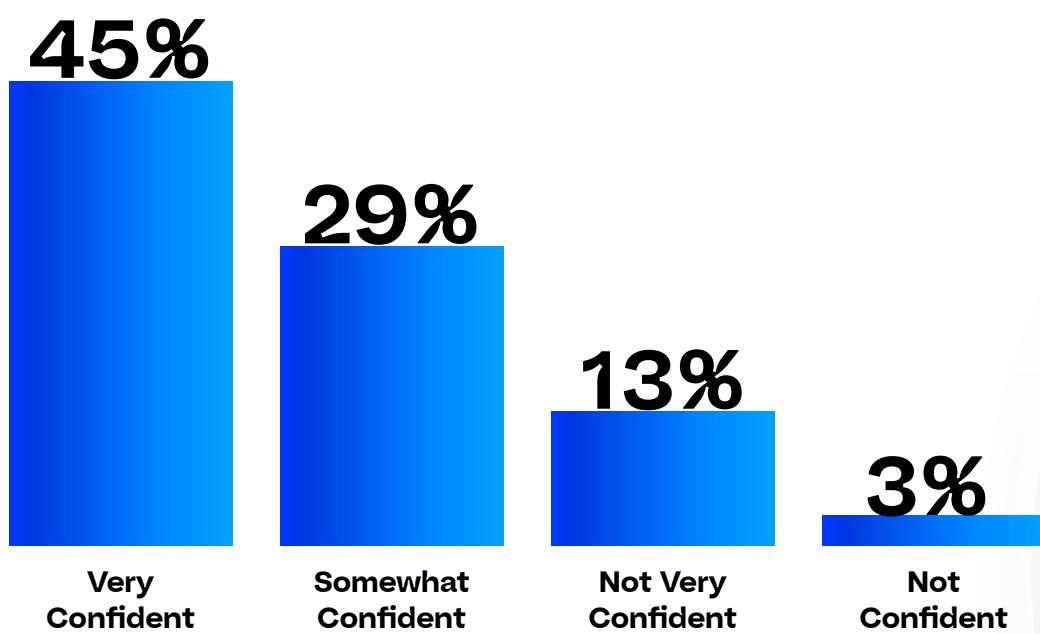
Just 15 minutes offline can cascade into **longer queues, delayed orders, stressed teams, lost revenue, and a guest experience that's hard to recover from.**

What feels like a brief interruption becomes a service-wide setback. One that operators can prevent with proactive, resilient connectivity.

SECTION 05

Security and Segmentation

While most operators believe their setup is broadly secure, the data suggests room for improvement.



9.5% have experienced or confirmed a security incident, while another 22% suspect one may have occurred.

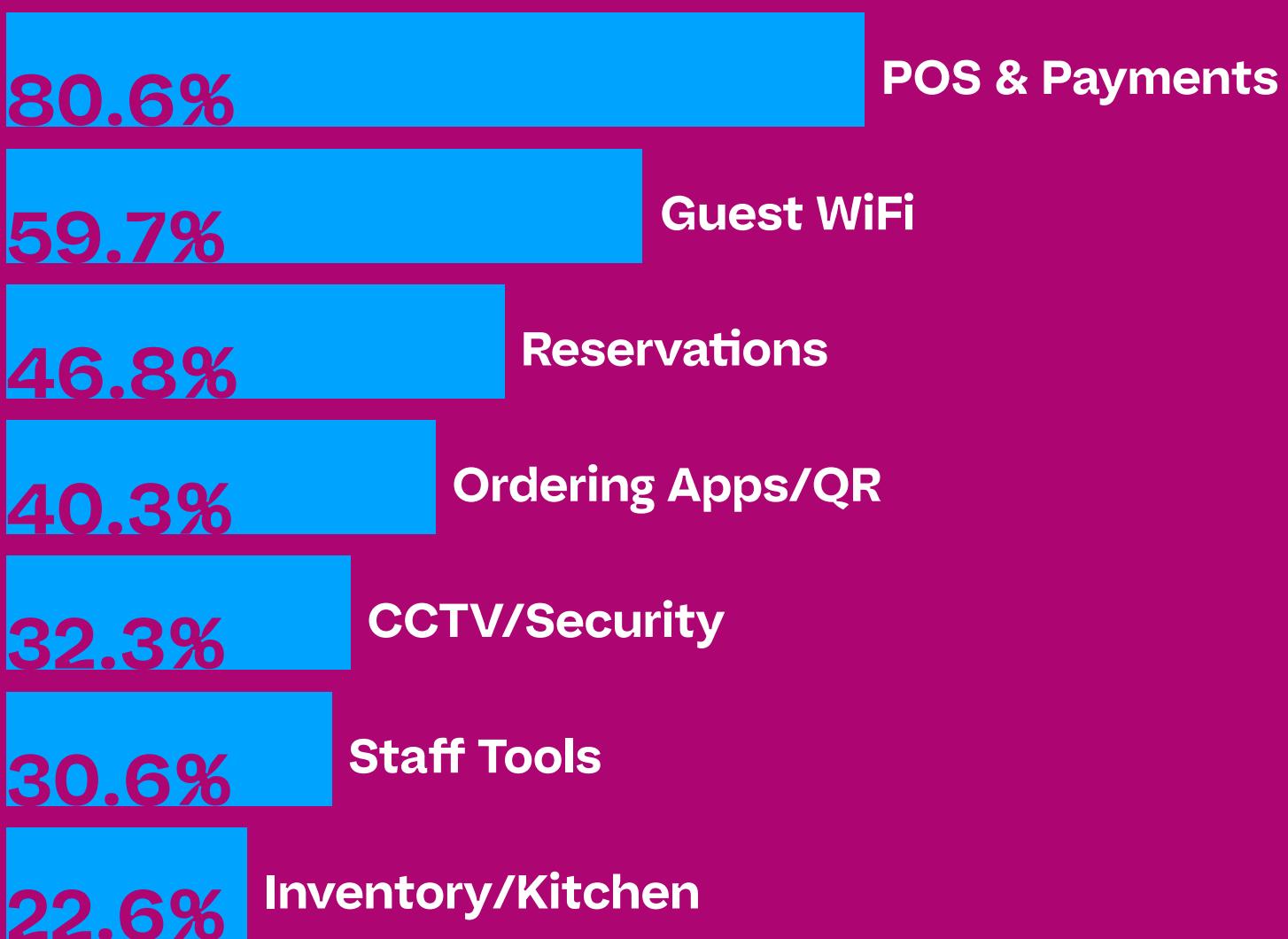
On a positive note, **63% separate guest and staff networks**, but **8% admit to having no clear process for network access**.

Conclusion: Security confidence is higher than visibility confidence, but the absence of monitoring tools or segmentation standards leaves exposure risk.

SECTION 06

Connectivity in Operations

Most connectivity-dependent tools



Hospitality relies on connected systems more than ever. Payments, guest access and operational tools all depend on a stable, resilient network.

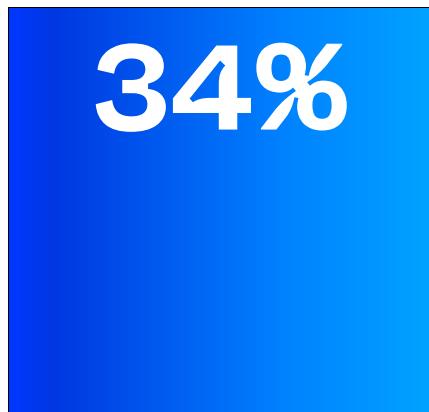
SECTION 07

Guest Experience and Perception

Guest Importance Ranking:



Critical



Very
Important



Somewhat



Guests notice connectivity failures long before operators do.

Lag at the table, slow payments and poor WiFi now directly affect loyalty.

“

Boardrooms are full of conversations about looking after the guest and hospitality. As a leader in technology, it is that end result that needs to be in every conversation.



ROCCO FORTE HOTELS

VP of Technology
Andrew Evers



SECTION 08

Operator Wishlist

Operator Wishlist: The New Non-Negotiable

“

**Connectivity in hospitality
is no longer optional, it's
as important as gas, water
and electricity.**

CAFFÈ
NERO

Head of IT Services and Solutions

Andy Maynard



Commentary

The findings make one thing clear: confidence in connectivity is built less on raw speed and more on trust. Operators are prioritising visibility of network performance and faster support over infrastructure upgrades alone, signalling a need for transparency, accountability and rapid response when issues arise. While stronger WiFi coverage and staff training still play a role, they are secondary to knowing what's happening in real time and having support that acts quickly and decisively. In short, improving connectivity confidence isn't just about better broadband, it's about giving operators the insight and backup they need to keep service running smoothly.

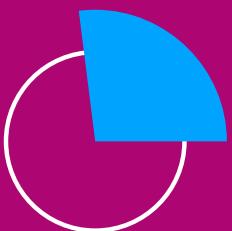
Top Improvements Operators Want

Better Visibility: 32%
Faster Support: 27%
Stronger WiFi Coverage: 24%
Staff Training: 10%
More Resilient Connection: 3%

32%



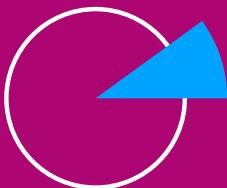
27%



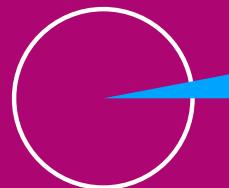
24%



10%



3%



Better Visibility

Faster Support

Stronger WiFi
Coverage

Staff Training

More Resilient
Connection

SECTION 09

From Cost to Competitive Edge

Connectivity is no longer a background cost. It directly affects:

Revenue

Team Efficiency

Guest Perception

Operational Resilience

As hospitality becomes more digital, from AI tools to IoT, reliable connectivity shifts from utility to competitive advantage.

“

We take too long to invest, waiting for something to break whilst teams keep it alive.

Kula CEO
Paul Spencer



SECTION 10

Recommendations for Operators

Recommendations for Operators

No.	Qs	Action
1	Do you actually know how your network performs?	Measure before you manage. Use basic visibility tools to track uptime, latency and device load.
2	Is your setup built for your busiest 30 minutes?	Peak design, not average. Size bandwidth and access points for peak demand, not quiet hours.
3	Who's on your network - and who shouldn't be?	Segment securely. Separate guest and operational networks. Control access and rotate credentials.
4	When something breaks, who owns the fix?	Clarify accountability. Reduce vendor sprawl. Set a single escalation path and incident process.
5	What happens if the internet drops?	Build in resilience. Add 4G/5G failover or dual connectivity to protect payments and service.
6	Is connectivity reviewed as the business evolves?	Revisit regularly. Review network performance annually alongside your wider tech stack.

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SECTION 11

Conclusion: Bringing Hidden Barriers Into View

Connectivity is an operational backbone. Operators who treat it proactively, with visibility, resilience and clarity, will be best placed to deliver modern guest experiences and adopt next-generation tools.

The future belongs to businesses that refuse to let connectivity fail silently.





A trusted hospitality
technology community

A leading provider of resilient,
business-grade connectivity