

Hospitality Sector Council

Hospitality Tech Report – February 2026

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The headlines

Introduction from Jane O’Riordan

In our early work examining barriers to innovation in the sector, the team at the Hospitality Sector Council identified a significant gap in knowledge and understanding. This challenge was particularly pronounced among small and medium-sized enterprises (SMEs), which make up the largest portion of the sector. At the time, there was no central repository of technical solutions, meaning most businesses relied on informal networks or advice from accountants to determine which systems similar organisations were using.

This lack of visibility reduced confidence in trialling new solutions—especially given the cost, time, and disruption often associated with implementing major changes.

The sector’s first technology audit, powered by 125, has been designed to address this gap. It showcases the range of available solutions and provides insight into how operators who use them have rated their performance. We hope that by demonstrating the value of shared learning, even more operators will be encouraged to participate in future surveys. While we have treated ratings based on very small response numbers with caution—providing indicative feedback where appropriate—the dataset contains far more depth than can be captured in these summary slides. I encourage anyone who completed the survey and would like a deeper understanding of the findings to contact 125 Insights directly.

Who responded?

The businesses that made up our responses fell mainly into the categories of Casual Dining (making up 48% of responses), Pubs, Bars and Late-night (28%) and QSR (12%). There were also responses from Competitive Socialising brands (3%), Catering companies (4%) and “Other” business types (4%). The total sample size was 746 individual platform ratings, with responses from across all the sub-sectors. Survey respondents typically rated multiple tech suppliers, providing a broad and detailed picture of usage and how technology providers are rated in various business types.

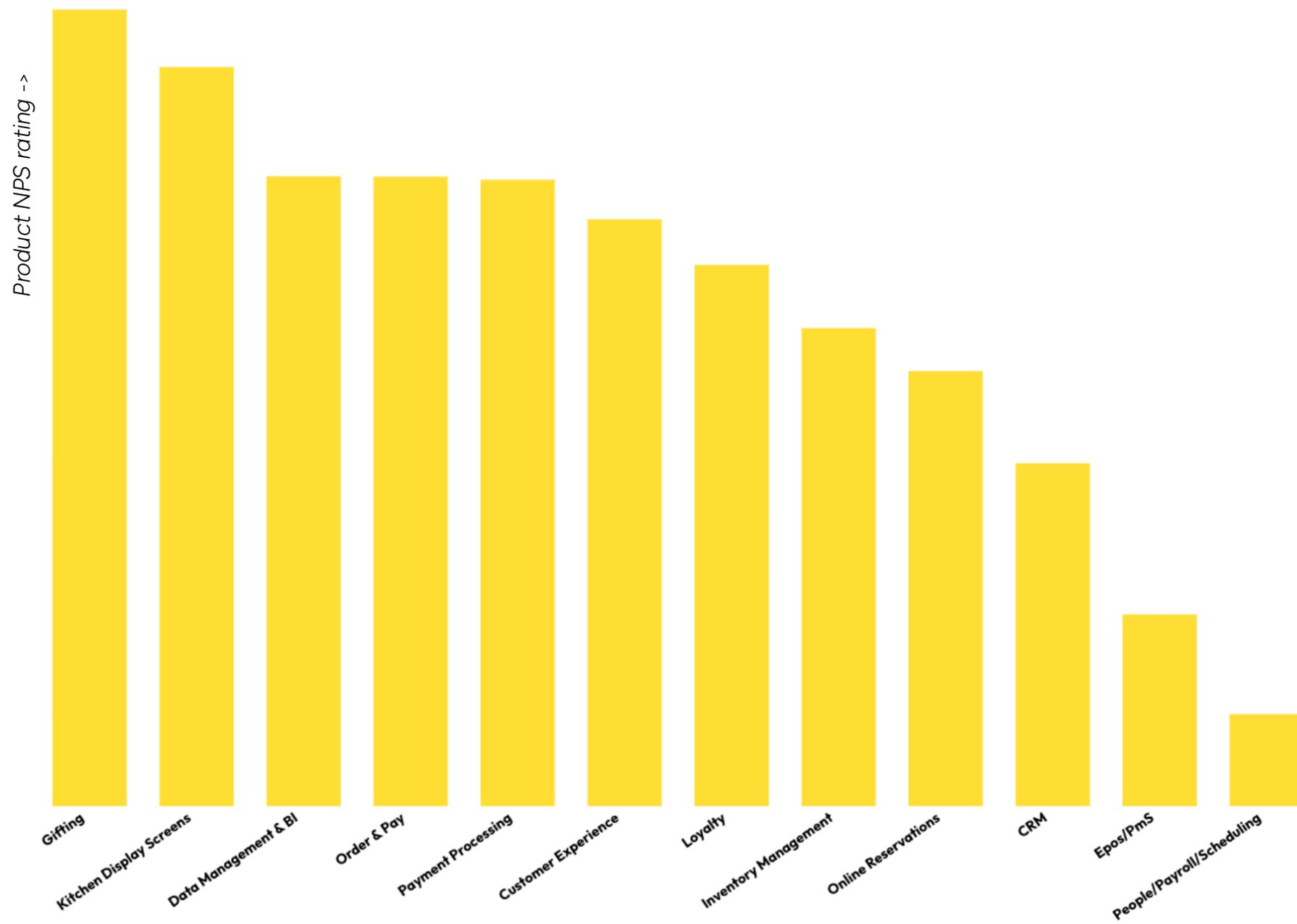
In terms of the scale of the businesses that provided feedback, 39% were SMEs with up to five locations and 61% were larger “enterprise” scale companies. In our biggest vertical sub-sectors, the scale of businesses that responded to the survey varied: 70% of Casual Dining responses came from enterprise scale businesses, 80% for QSR and 50% FOR Pubs, Bars and Late-night.

Categories: most frequently reviewed and highest-rated

The most frequently reviewed category in our survey was EPoS, followed by People platforms, Payment, CRM, Customer Experience and BI/Data platforms.

The bar chart on the right shows a different picture: the categories of technology that were rated highest by our survey respondents.

Highest-rated categories



Key themes

Using AI to evaluate the themes and sentiment that came from survey responses, we can pull out the areas that hospitality businesses are most interested in when they look at the benefits of new technology.

1. Operational efficiency & time savings

This was the strongest and most consistent theme. In this area, operators value tools most highly that:

- Reduce manual admin (rotas, payroll, stock, reporting)
- Automate repetitive tasks
- Integrate smoothly with day-to-day operations

Responses mentioned labour and rota management tools here, along with EPoS, stock and kitchen management and back-office automation.

Underlying insight: Productivity is defined less as “working faster” and more as removing friction from daily operations.

2. Integrated ecosystems (POS + payments + operational tools)

Many respondents (especially at enterprise scale) don't praise a single tool, but rather a connected stack. Operators value:

- EPoS systems that integrate with payments, kitchen, loyalty, and reporting
- More connected systems
- One source of truth for operational data

Underlying insight: Productivity improves when systems talk to each other, but there's often a trade-off for operators between “best-in-class” standalone solutions and one-stop solutions. For many, an ideal world would be closer integrations between best-in-class systems.

Key themes (continued)

3. Ease of use & clarity

Even when functionality is strong, usability matters. Respondents mentioned:

- They look for “simple”, “clear”, or “easy to use” tools
- When it isn't clear what a tech platform is there for, or how it should work, hospitality teams quickly get frustrated and buy-in is lost

Underlying insight: Complex tools may actually undermine productivity if they are not made easy to understand, regardless of feature depth and potential benefits.

4. Measurement, insight & data visibility

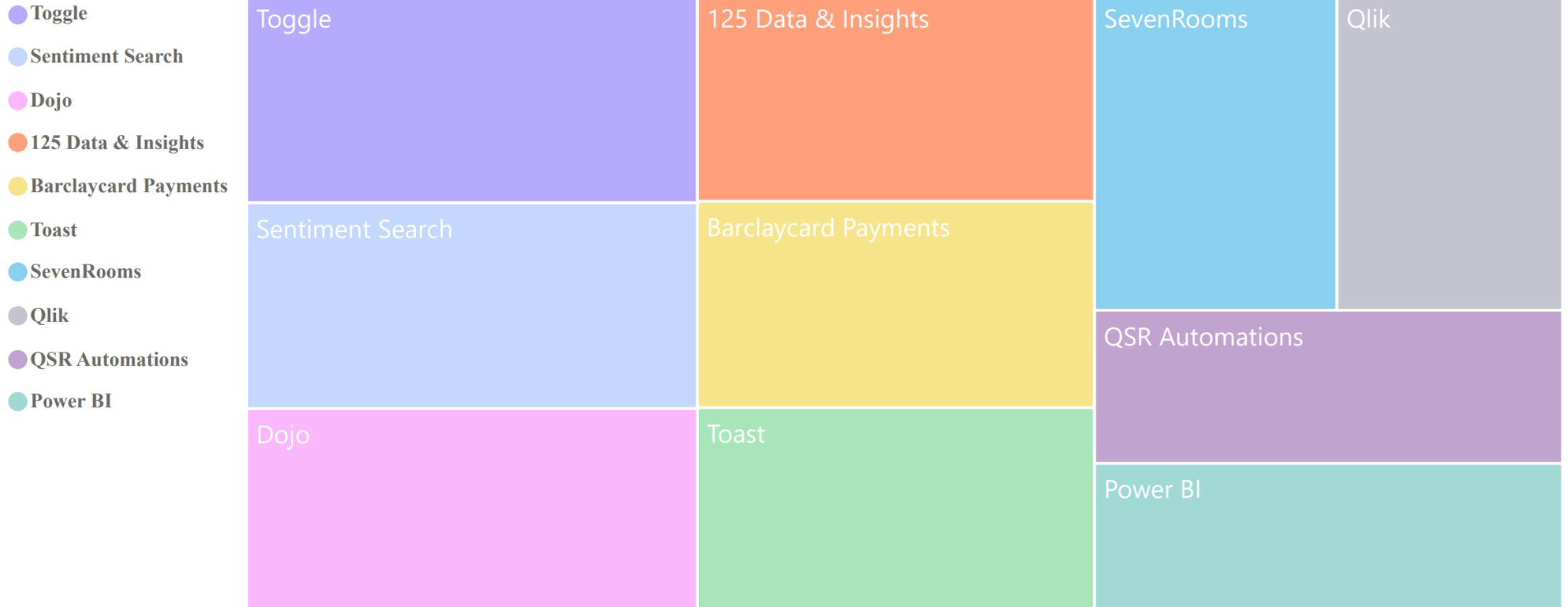
Data and insight were mentioned often, with respondents flagging that they value:

- Visibility of performance provided in real-time
- Clear reporting, with actionable insights and examples rather than raw data
- Sentiment, revenue and other performance data seen side-by-side
- Management dashboards

Underlying insight: Productivity is reinforced when teams can see what's working and what isn't, then strive for continual improvement.

The top scorers overall

This chart illustrates which tech tools received the highest NPS ratings overall. The larger the coloured rectangle, the higher the rating.



Findings are based on limited sample sizes and are intended to provide directional insight

Where the top ten excelled

We wanted to understand more about the specifics of what hospitality operators value in the tech they use. To do this we looked more closely at the survey results for the top ten tech providers, to see which areas of their offering was flagged as a positive. These are the areas where the suppliers particularly excelled, with 100% positive responses:

Ability to grow with you: Barclaycard Payments, Sentiment Search, SevenRooms, Toast, Toggle and 125 Data & Insights

Ability to keep up with the latest tech: Barclaycard Payments, Dojo, Power BI, Sentiment Search, Toast, Toggle and 125 Data & Insights

Connectivity: Sentiment Search, Toast and Toggle

Ease of use: Barclaycard Payments, Dojo, QSR Automations, Toggle and 125 Data & Insights

Technical support: Barclaycard Payments, Dojo, Power BI, Qlik, Sentiment Search and 125 Data & Insights

Value for money: Power BI, Sentiment Search and Toggle

Ratings by category

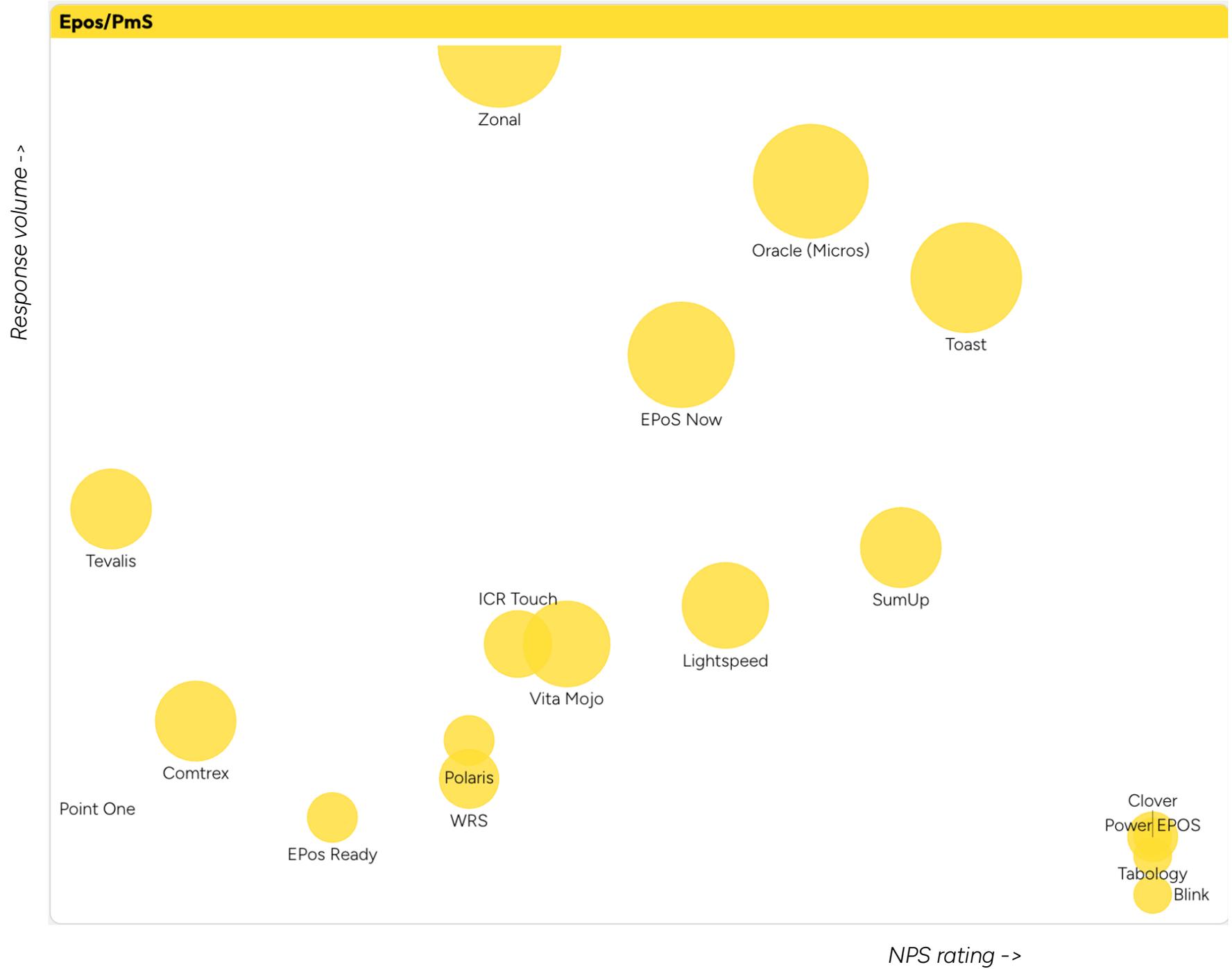
Relative ratings by category

For each category of tech that was rated by our respondents, we have produced a chart to show the relative scores they received.

The NPS rating for each tool has been plotted against the number of responses received, and to make this clearer, the size of each dot also indicates the volume of responses.

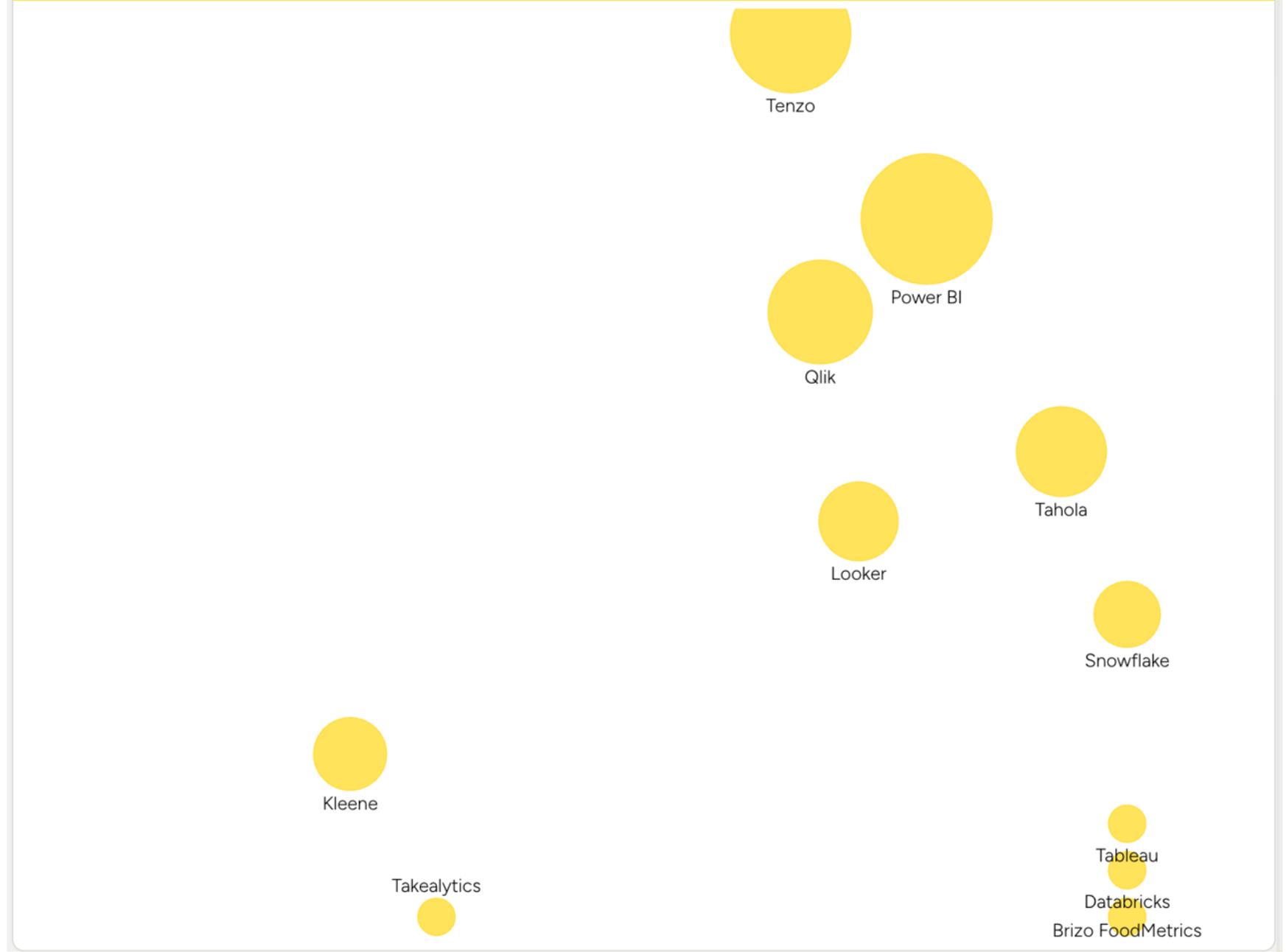
So the larger the dot the more this system is used, and systems with the best NPS scores are furthest to the right.

EPOS providers by NPS rating vs response volume



Data Management & BI

Response volume ->



NPS rating ->

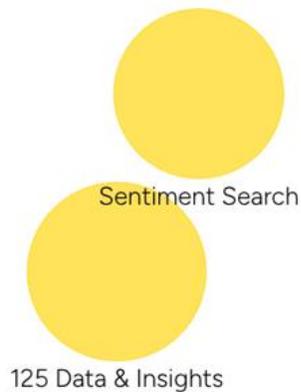
Data and BI tools by NPS rating vs response volume

Findings are based on limited sample sizes and are intended to provide directional insight

Customer experience tools by NPS rating vs response volume

Response volume ->

Customer Experience

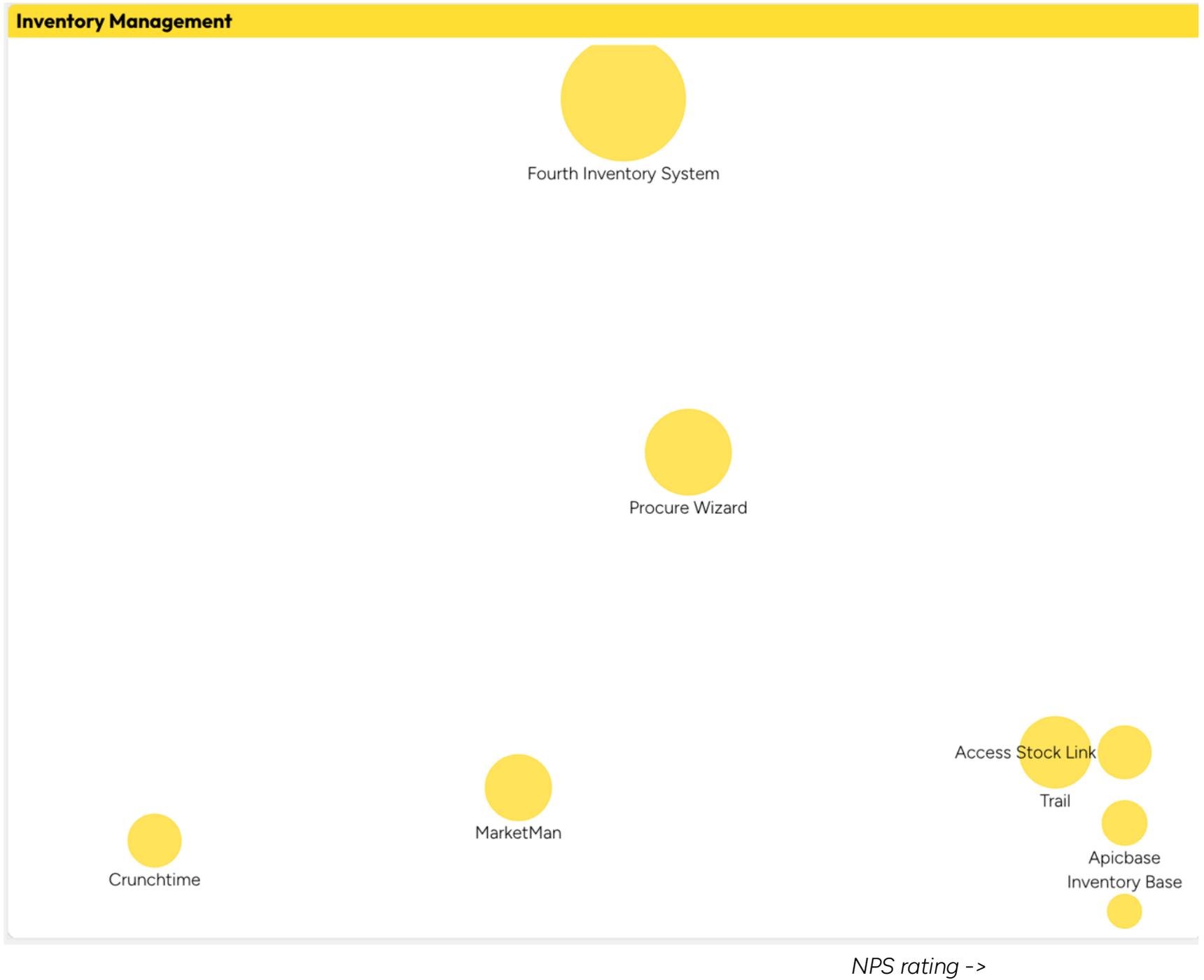


NPS rating ->

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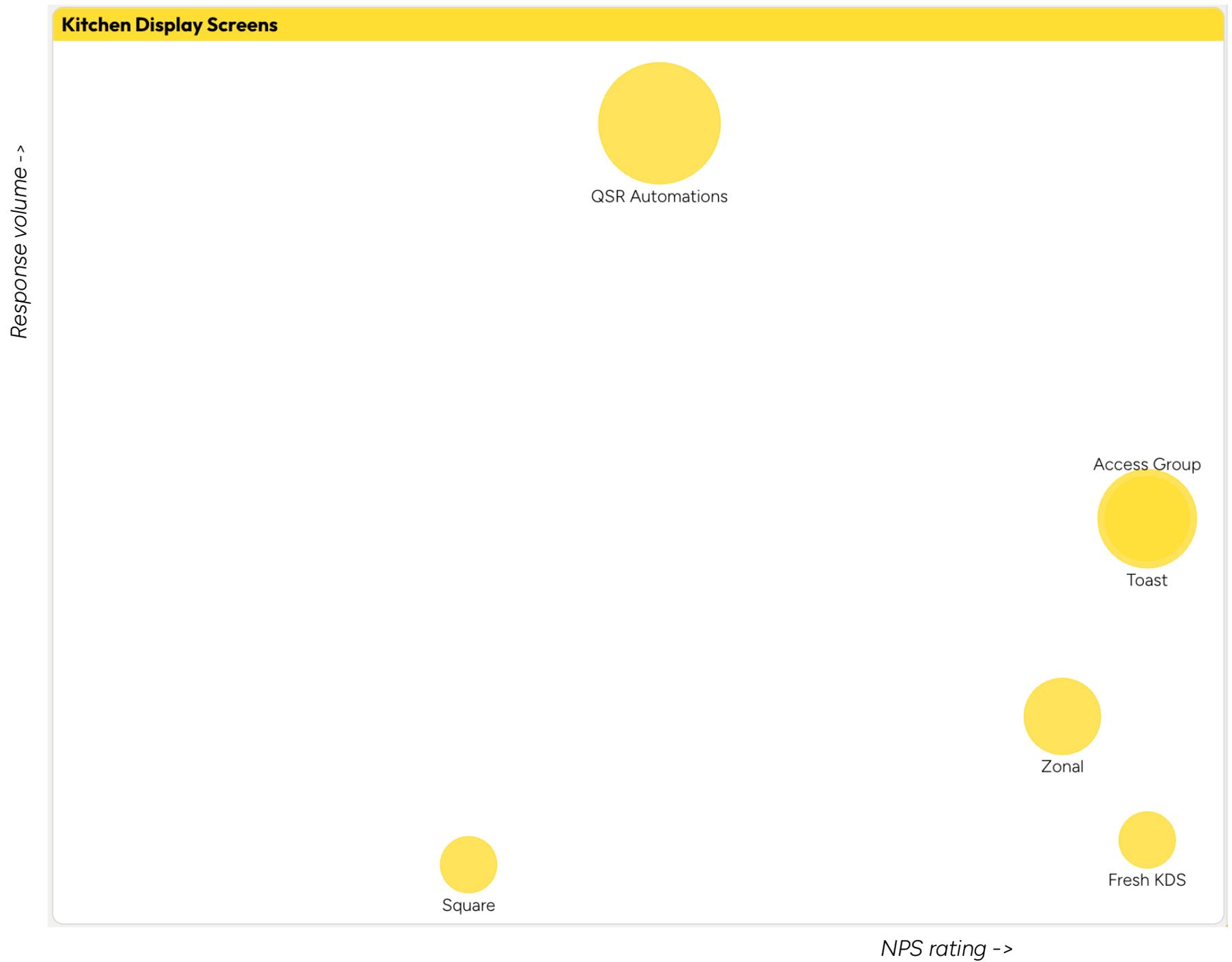
Inventory management tools by NPS rating vs response volume



Findings are based on limited sample sizes and are intended to provide directional insight

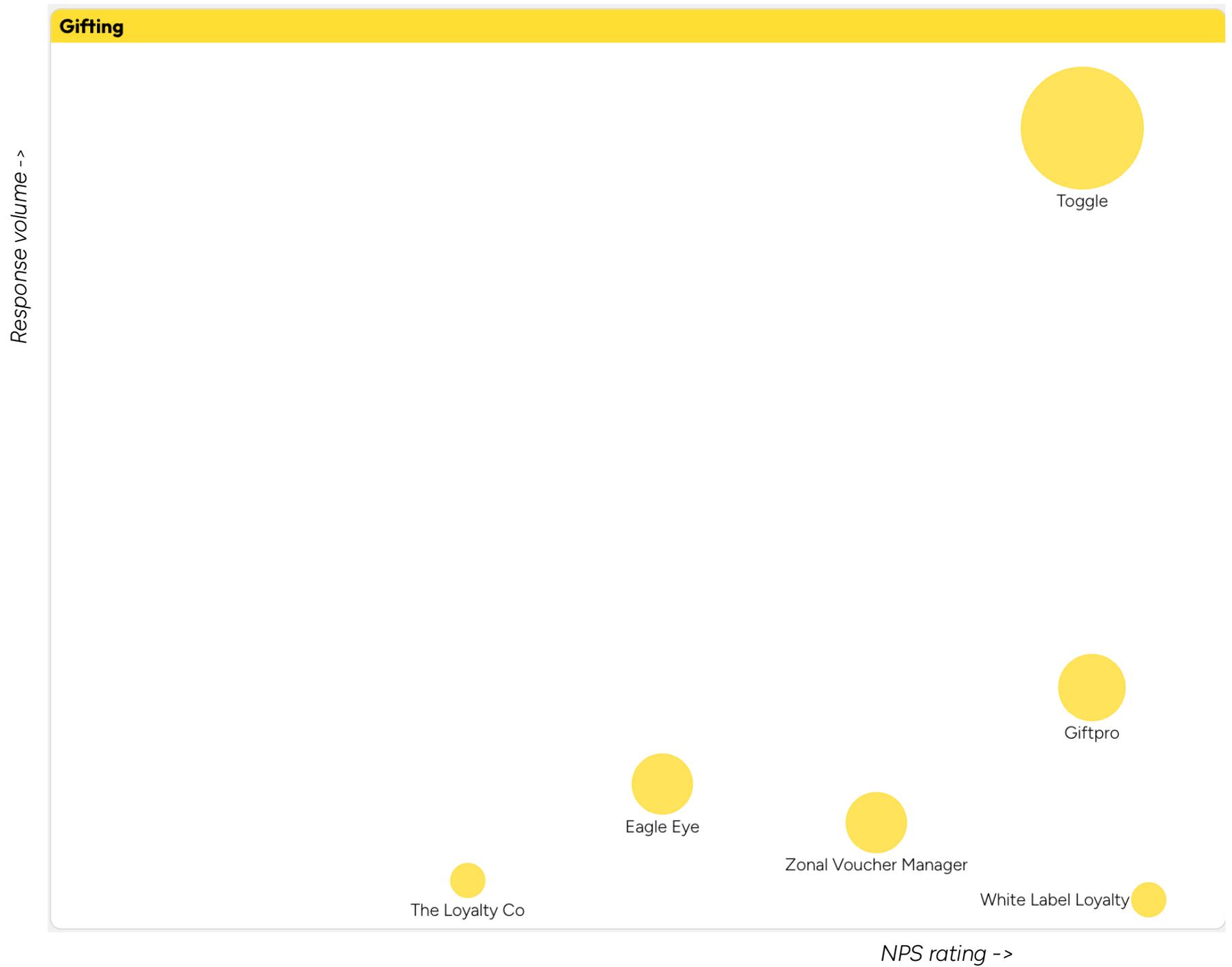
**Kitchen display systems
by NPS rating vs
response volume**

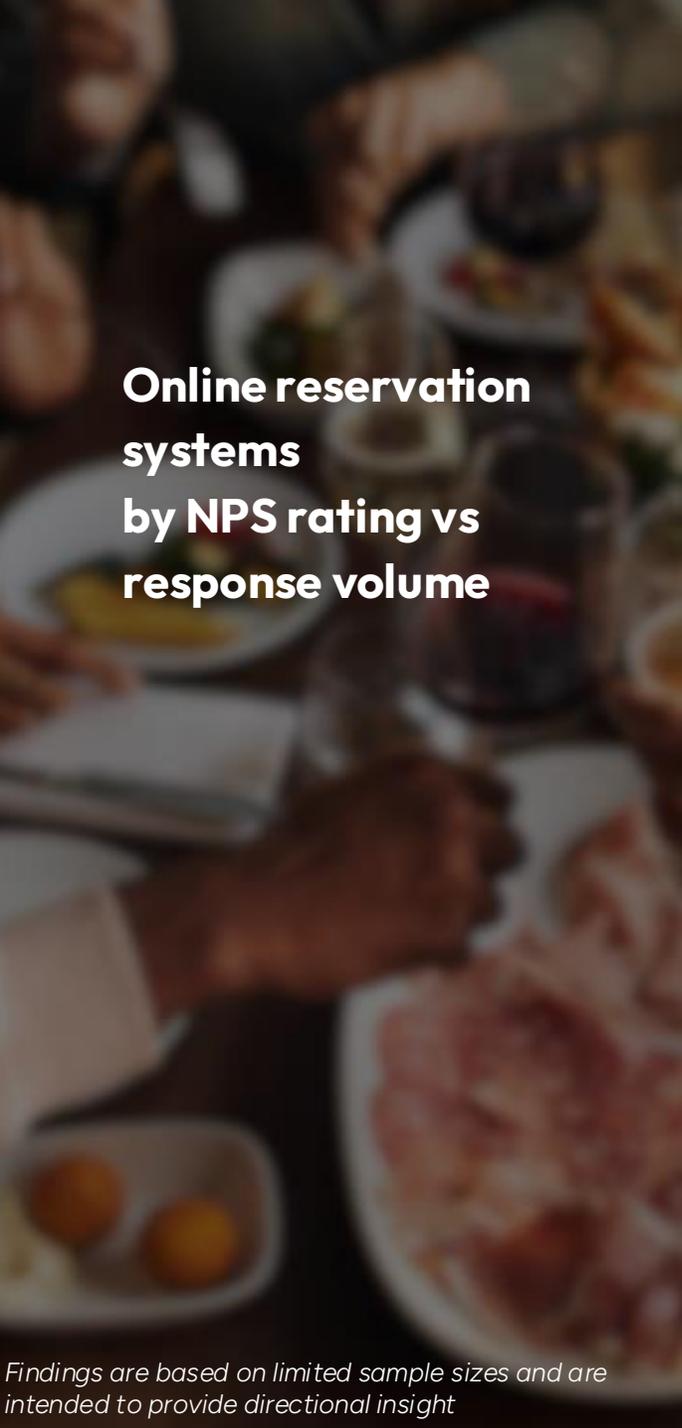
Findings are based on limited sample sizes and are intended to provide directional insight



Gifting tools by NPS rating vs response volume

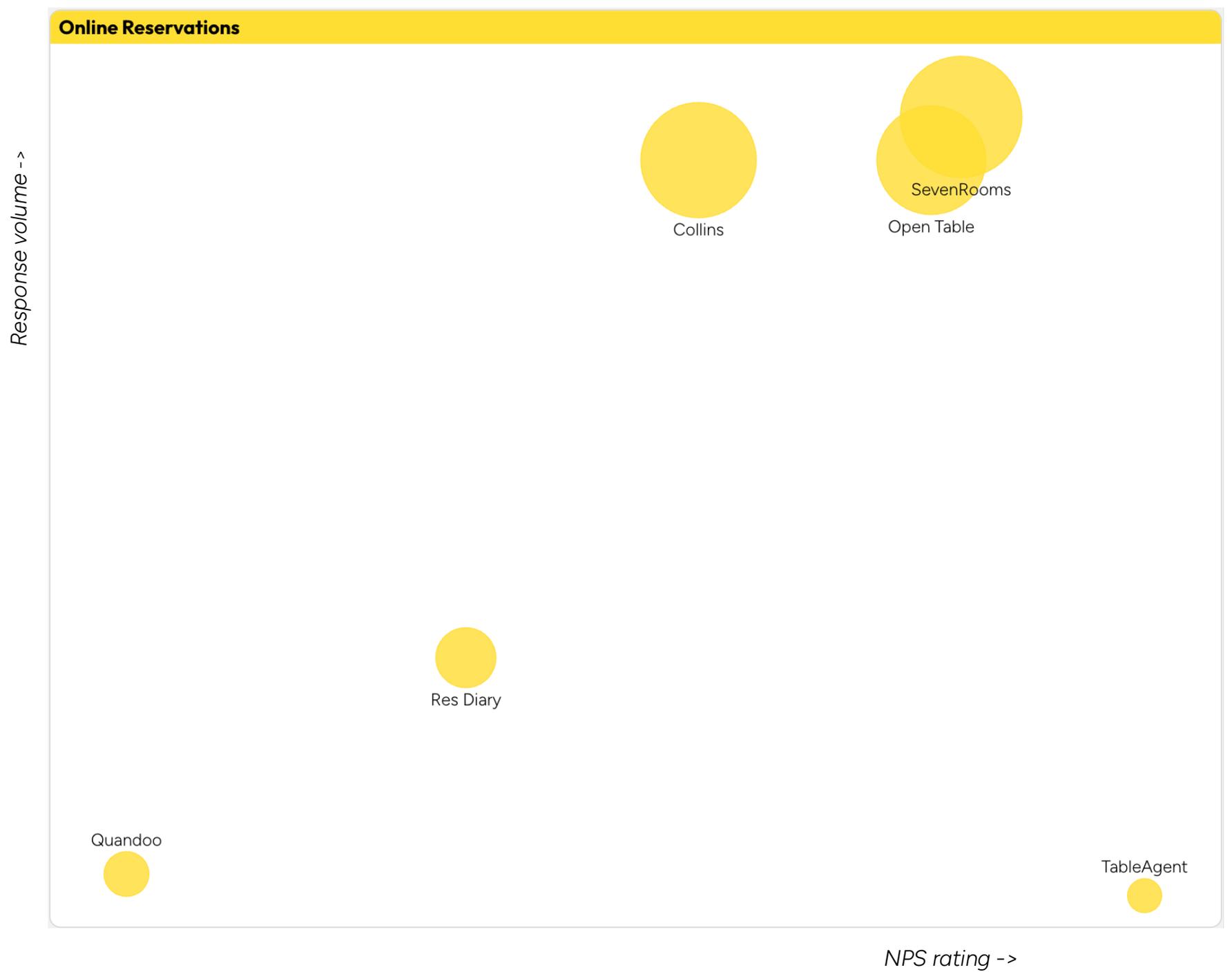
Findings are based on limited sample sizes and are intended to provide directional insight





Online reservation systems by NPS rating vs response volume

Findings are based on limited sample sizes and are intended to provide directional insight



Order & Pay providers by NPS rating vs response volume

Response volume ->

Order & Pay

Me&U (Mr Yum)



Sunday



Storekit



OrderPay



Zonal



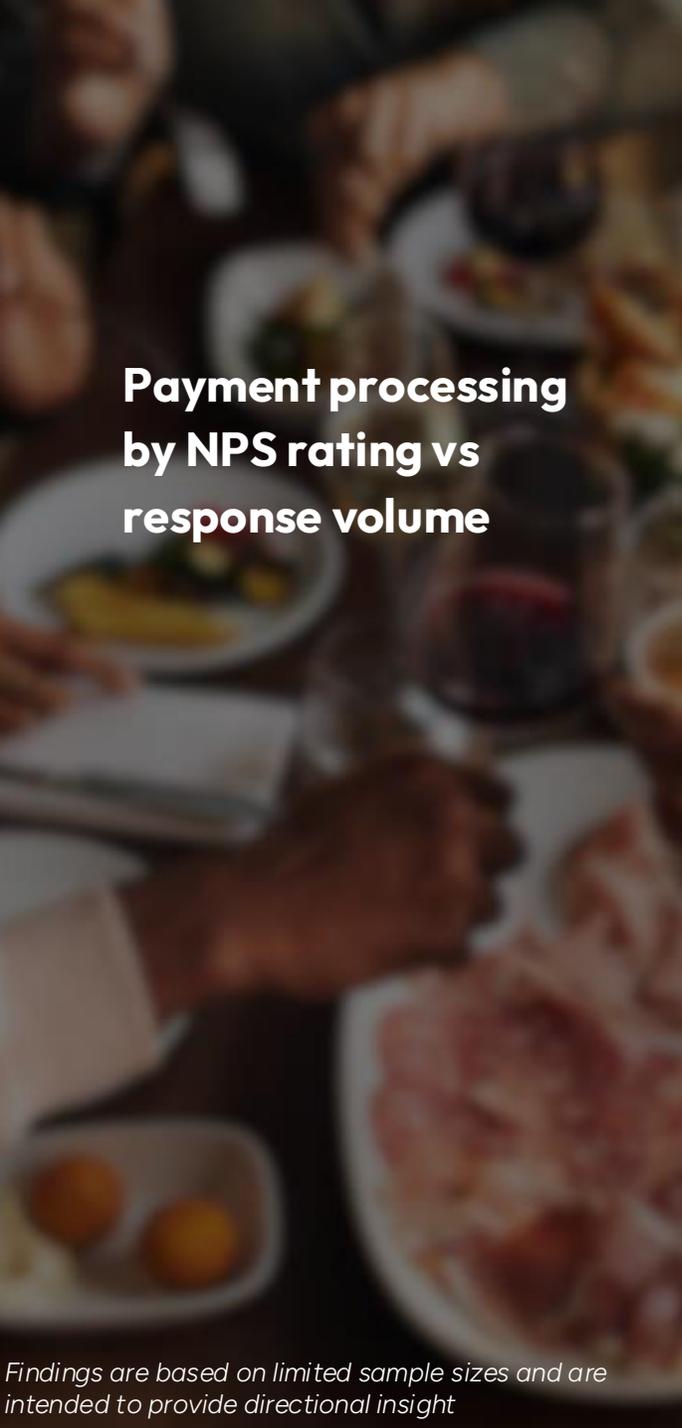
Fetch Pay

Slerp

Flipdish

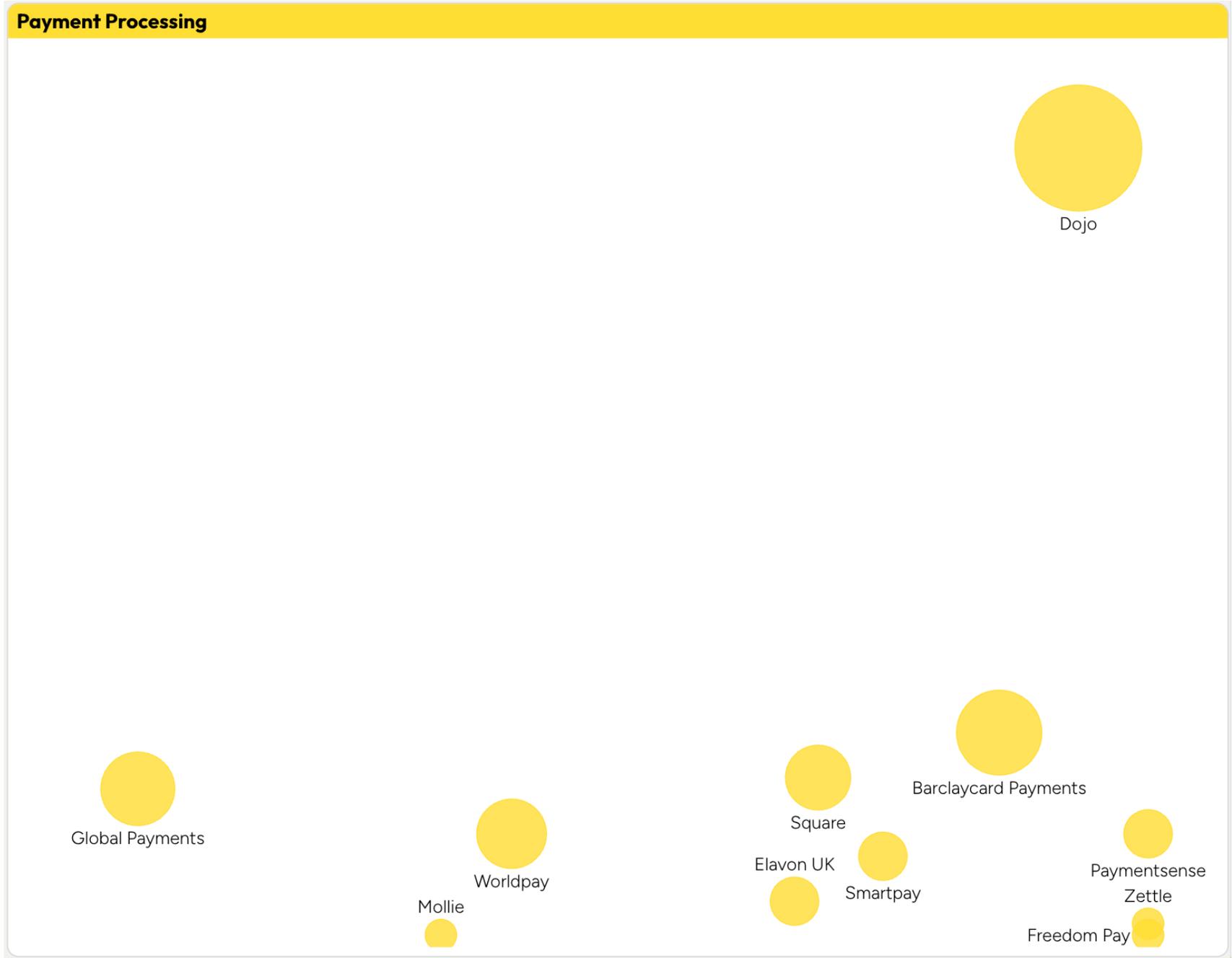
NPS rating ->

Findings are based on limited sample sizes and are intended to provide directional insight



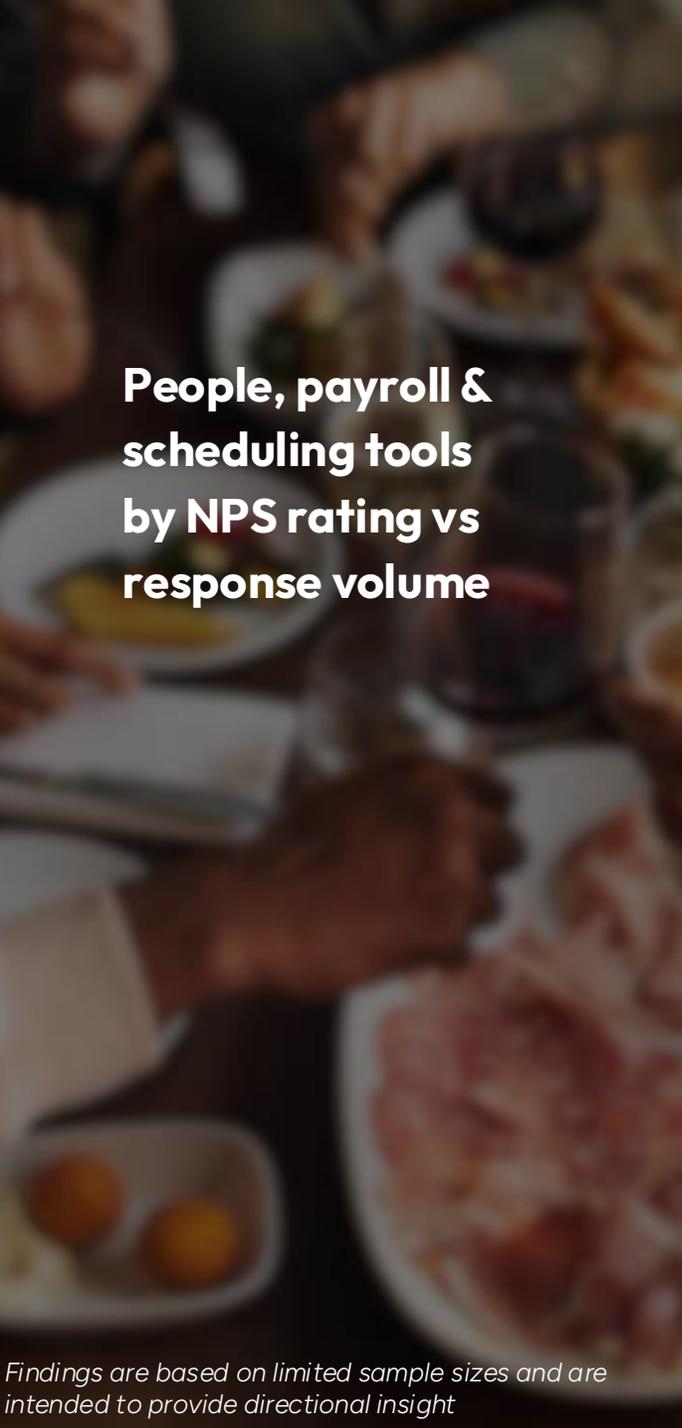
Payment processing by NPS rating vs response volume

Response volume ->

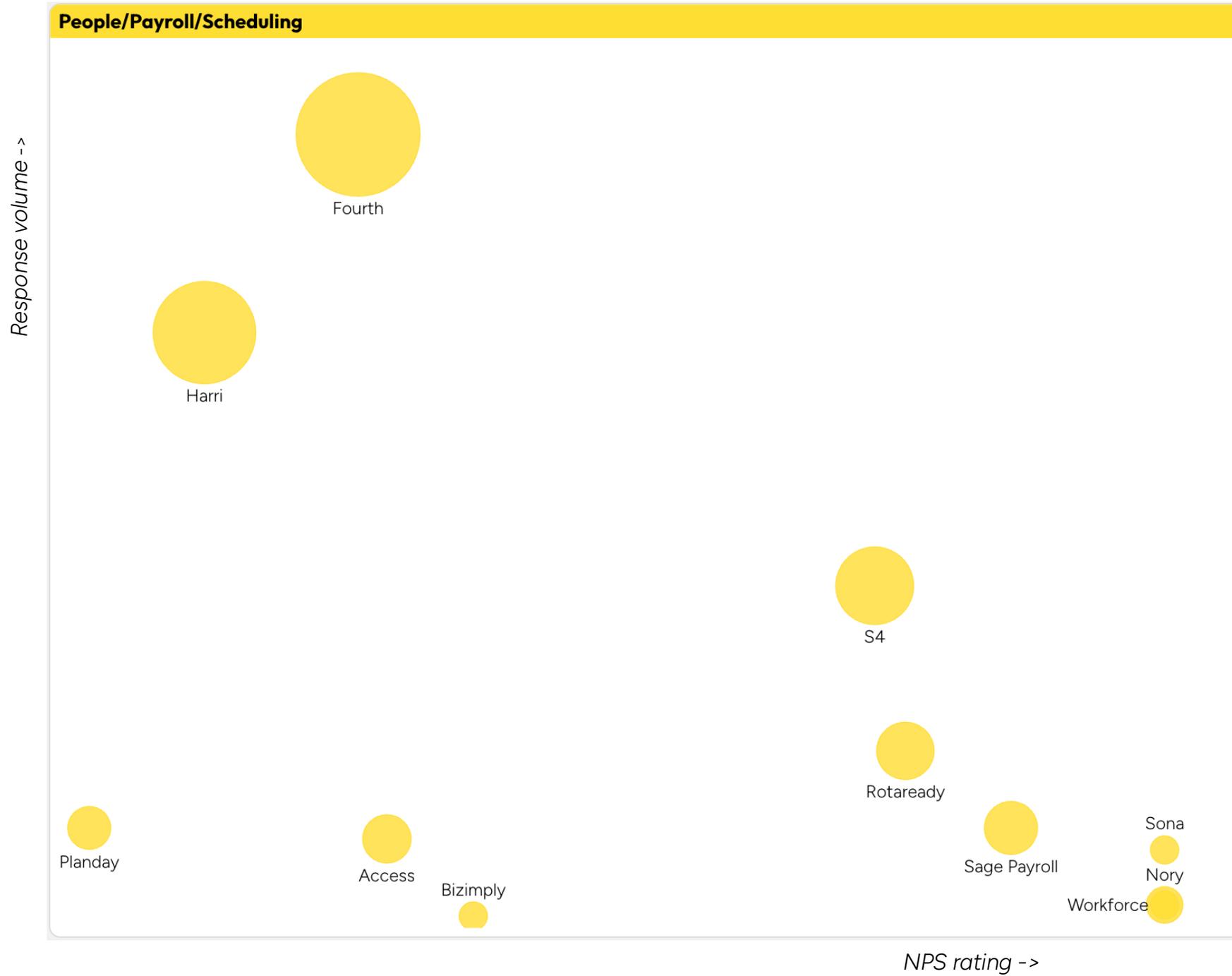


Findings are based on limited sample sizes and are intended to provide directional insight

NPS rating ->



People, payroll & scheduling tools by NPS rating vs response volume



Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment (overall and by category)

Positive sentiment

Looking across all categories, there were common themes in what our respondents saw as the biggest benefits delivered by their technology. By analysing the language used in the comments on survey responses, we were able to get under the skin of what these positive themes mean for hospitality operators and why they're important.

Automation & efficiency gains - the number one positive

- Saves time
- Reduces human error
- Streamlines workflows
- Helps teams move faster

The other key topics driving positive sentiment were:

Centralisation and visibility: all in one place, good reports and dashboards, better access to data across teams, more clarity

Ease of use: intuitive, easy to train, no "heavy" tech expertise needed, fast onboarding, enjoyable to use

Scalability and flexibility: easy to add new features or modules, adaptable (not rigid for users), can grow with the business

Integration: joined-up systems, smooth flow of data, less duplication, fewer workarounds and a calmer team

Negative sentiment

In a similar way, we looked at the common frustrations that respondents felt about technology, across categories.

Poor integrations and fragmented systems - the top frustration

- Means tools are not in sync
- Forces manual workarounds
- Creates data silos and inconsistent reporting
- “Death by a thousand cuts”

The other key topics driving negative sentiment were:

Complexity and poor user experience: too many tools, overly complex interfaces, hard to configure, causes resentment in the team

Poor value perception: pricing that doesn't scale, hidden costs, being locked in, paying for unused features

Lack of reliability: excessive downtime and bugs, slow responses from support teams, lack of onboarding guidance, poor documentation

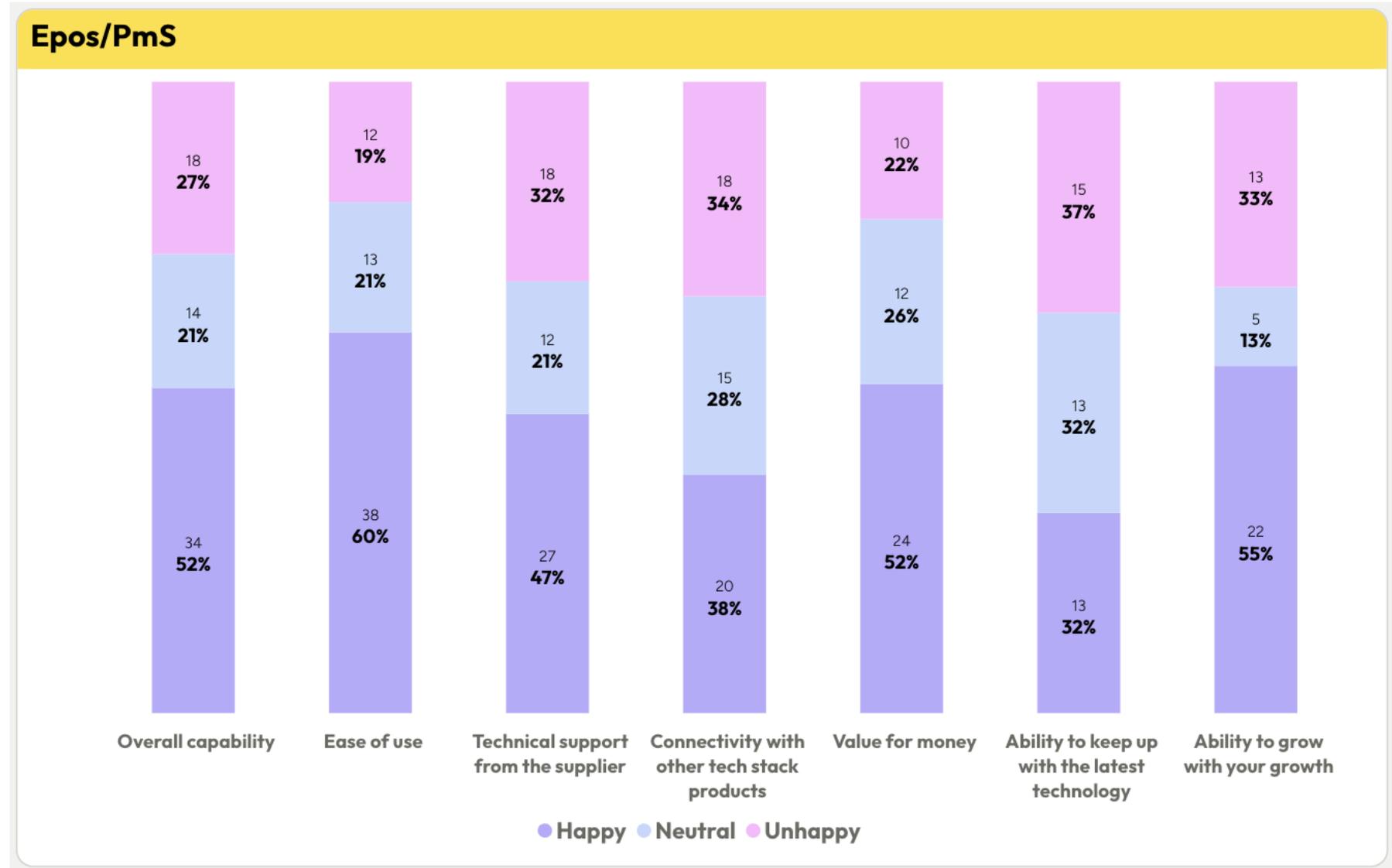
Low quality data and insight: no “single source of truth”, inconsistent data, manual reconciliation, all leading to bad decisions

Sentiment by category

We also looked at each category of technology in terms of sentiment.

The percentage of happy, neutral and unhappy responses across a range of criteria, we were able to get under the skin of how well each category of tech performs for hospitality operators.

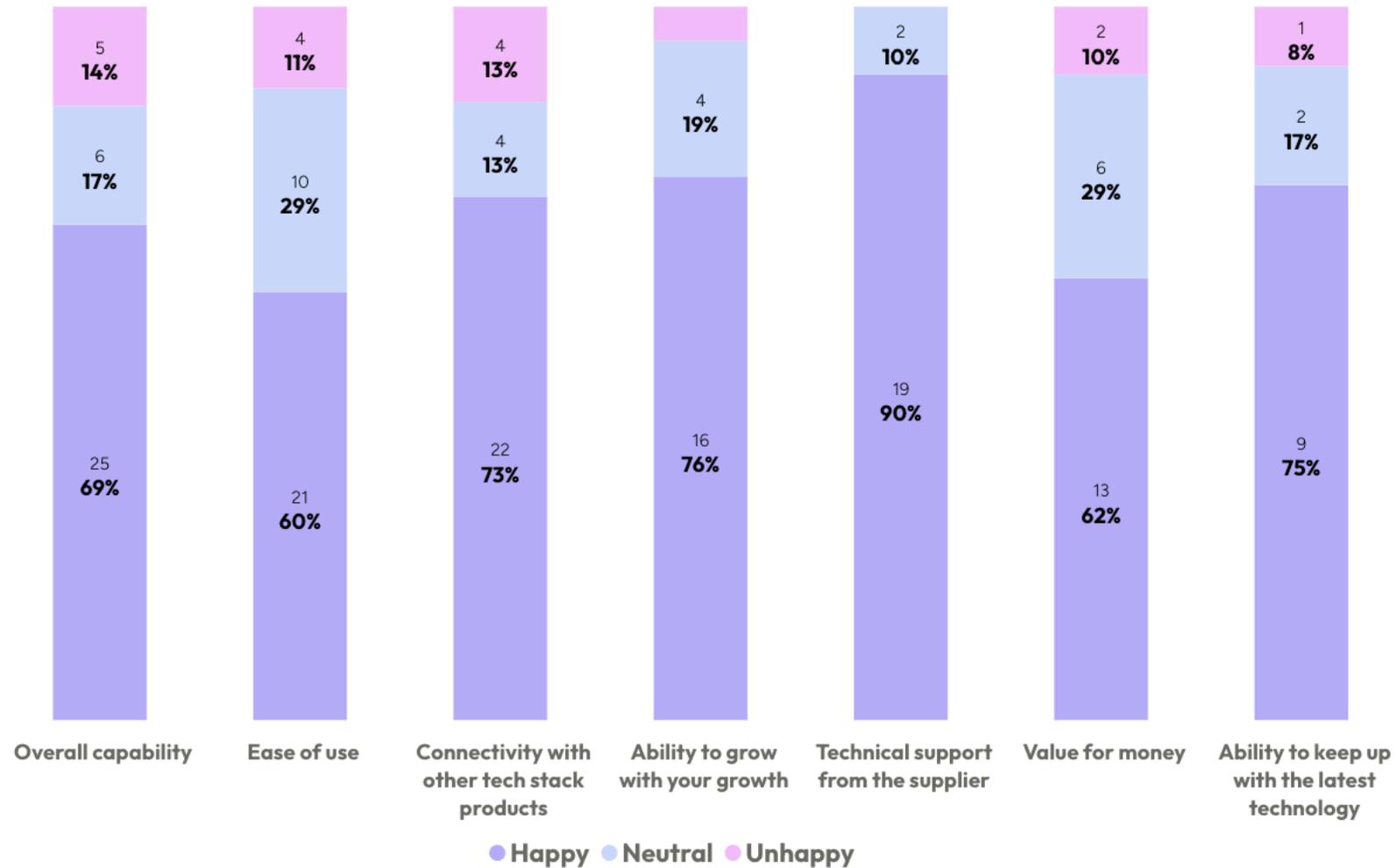
This chart shows sentiment scores for the EPoS/ PMS category



Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment scores for data management and BI tools

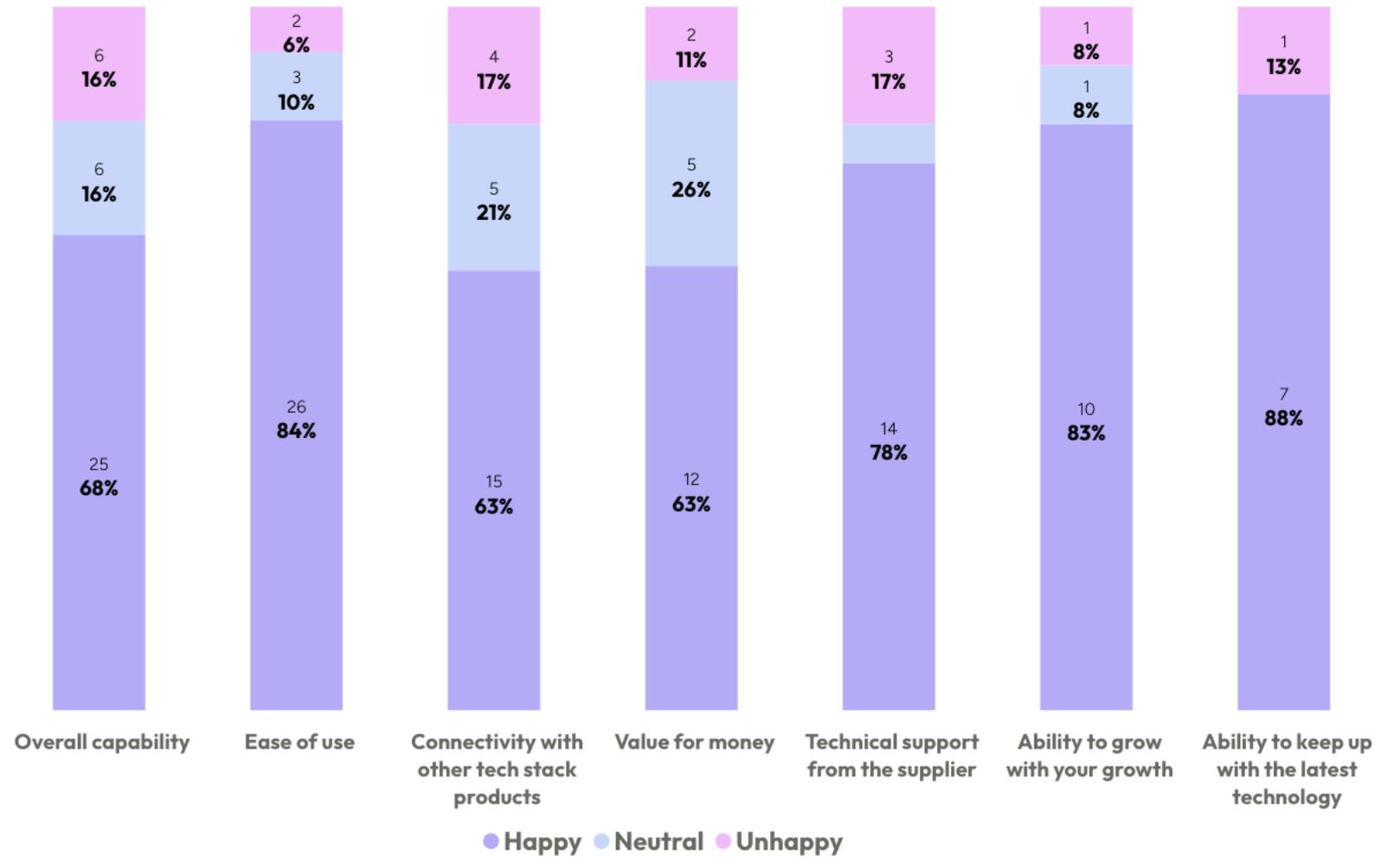
Data Management & BI



Findings are based on limited sample sizes and are intended to provide directional insight

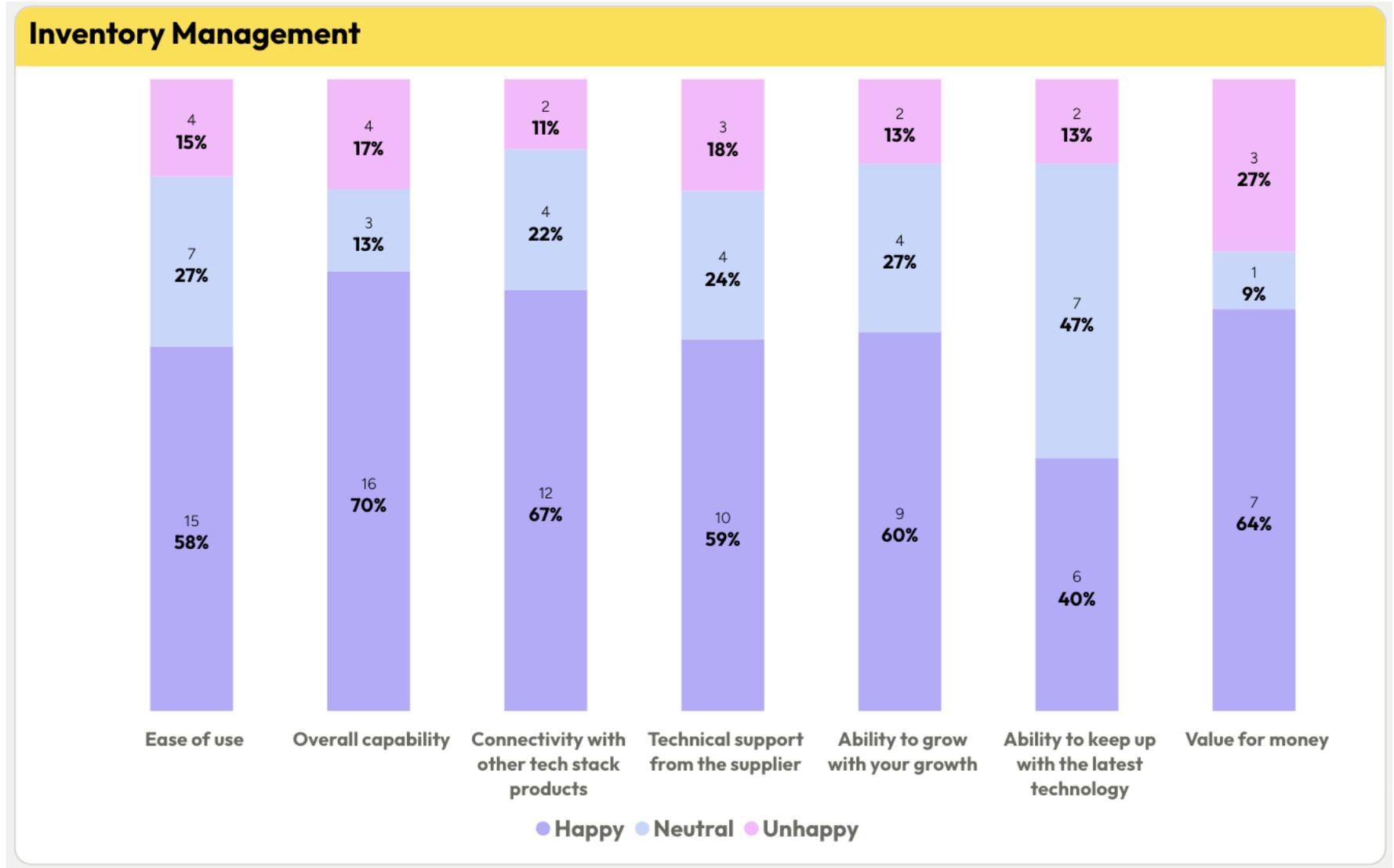
Sentiment scores for customer experience tools

Customer Experience



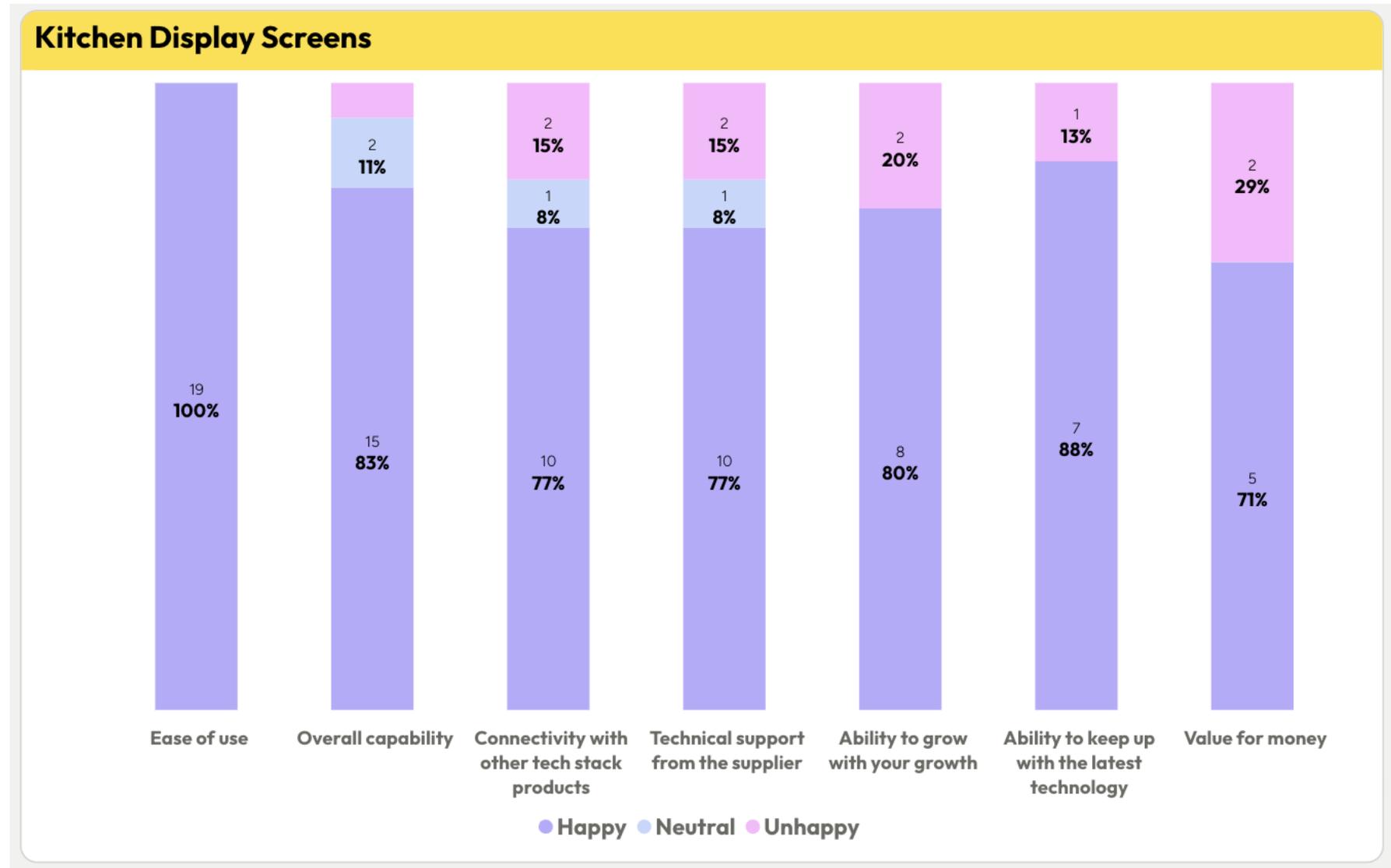
Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment scores for inventory management tools



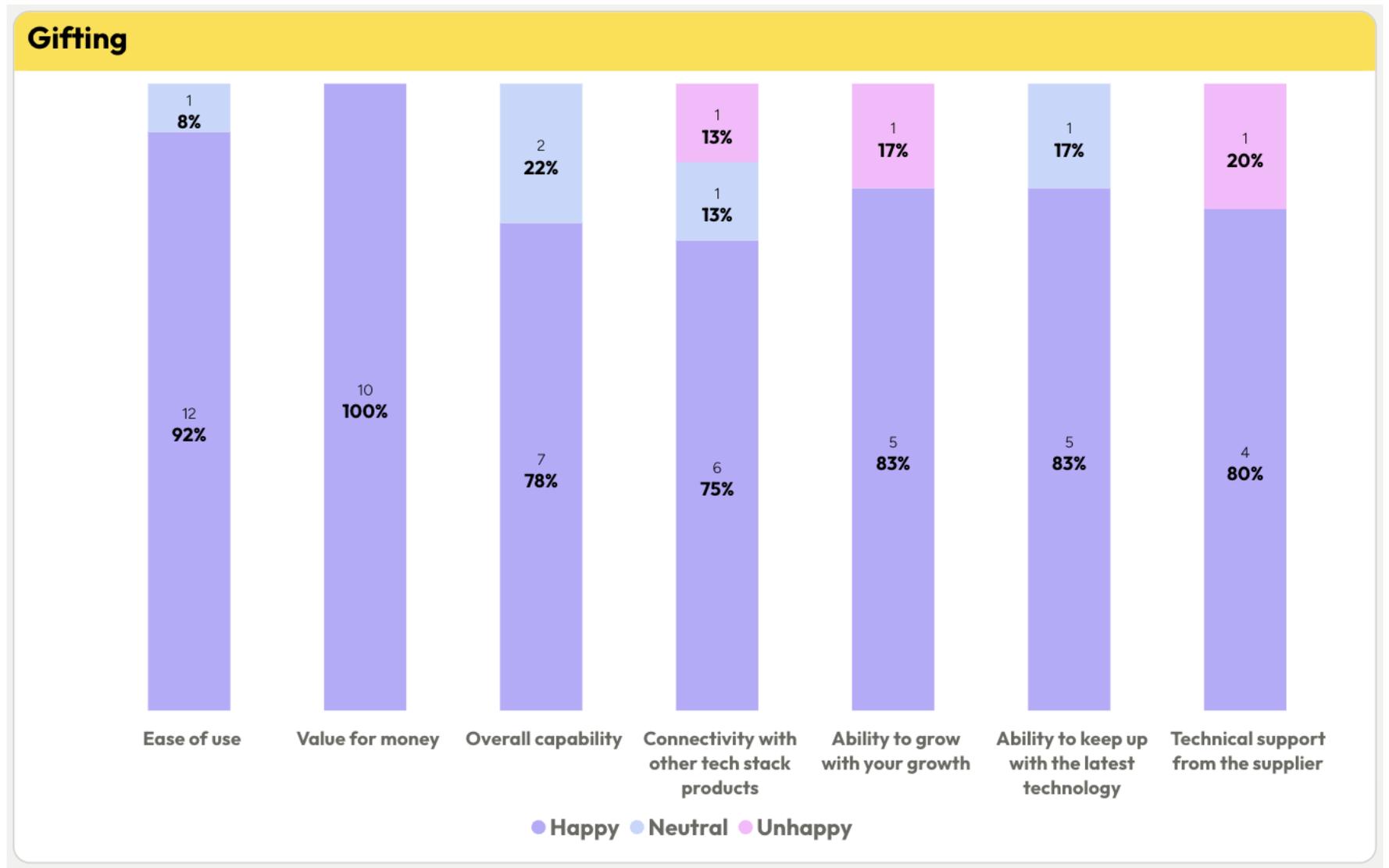
Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment scores for kitchen display systems



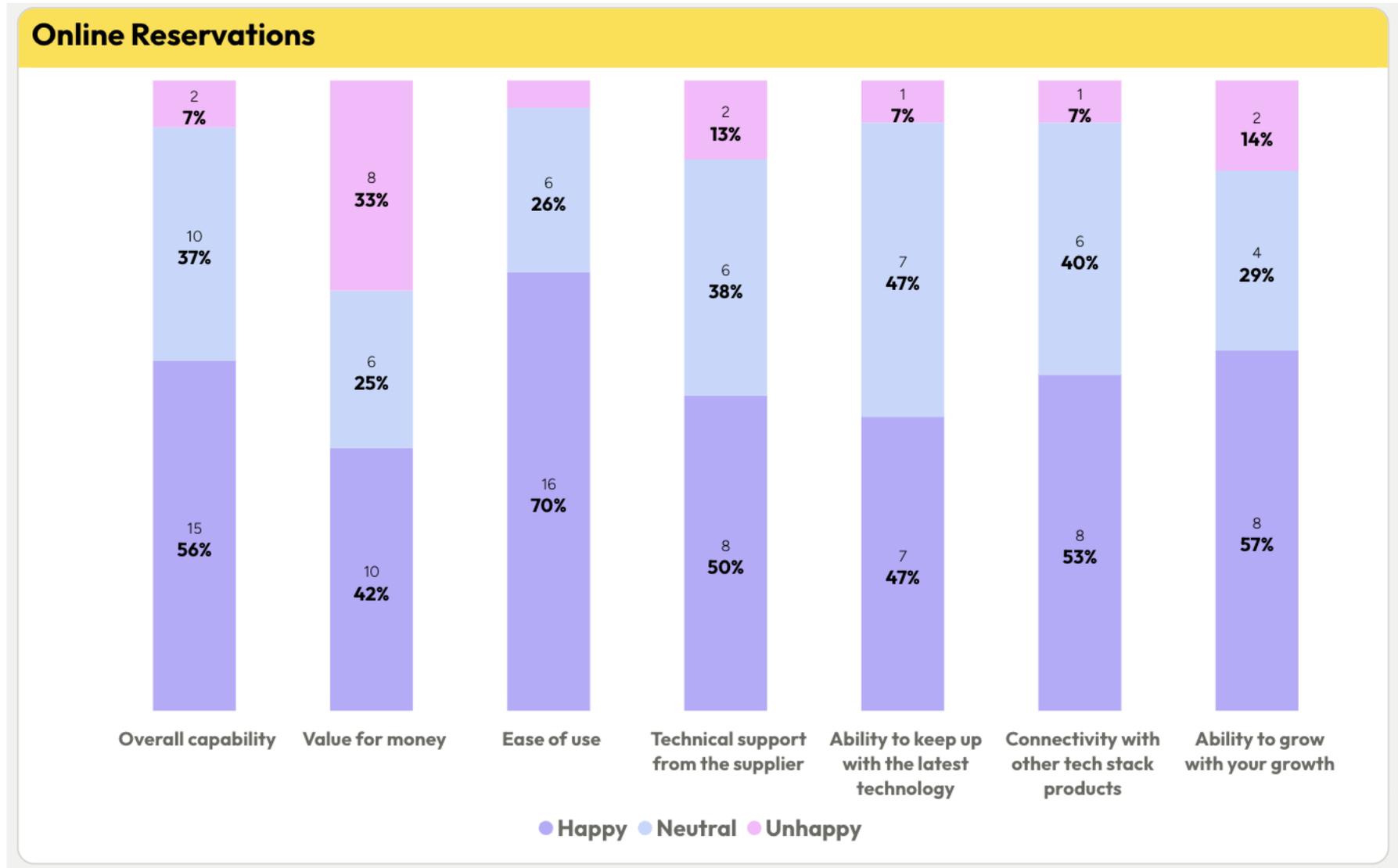
Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment scores for gifting tools



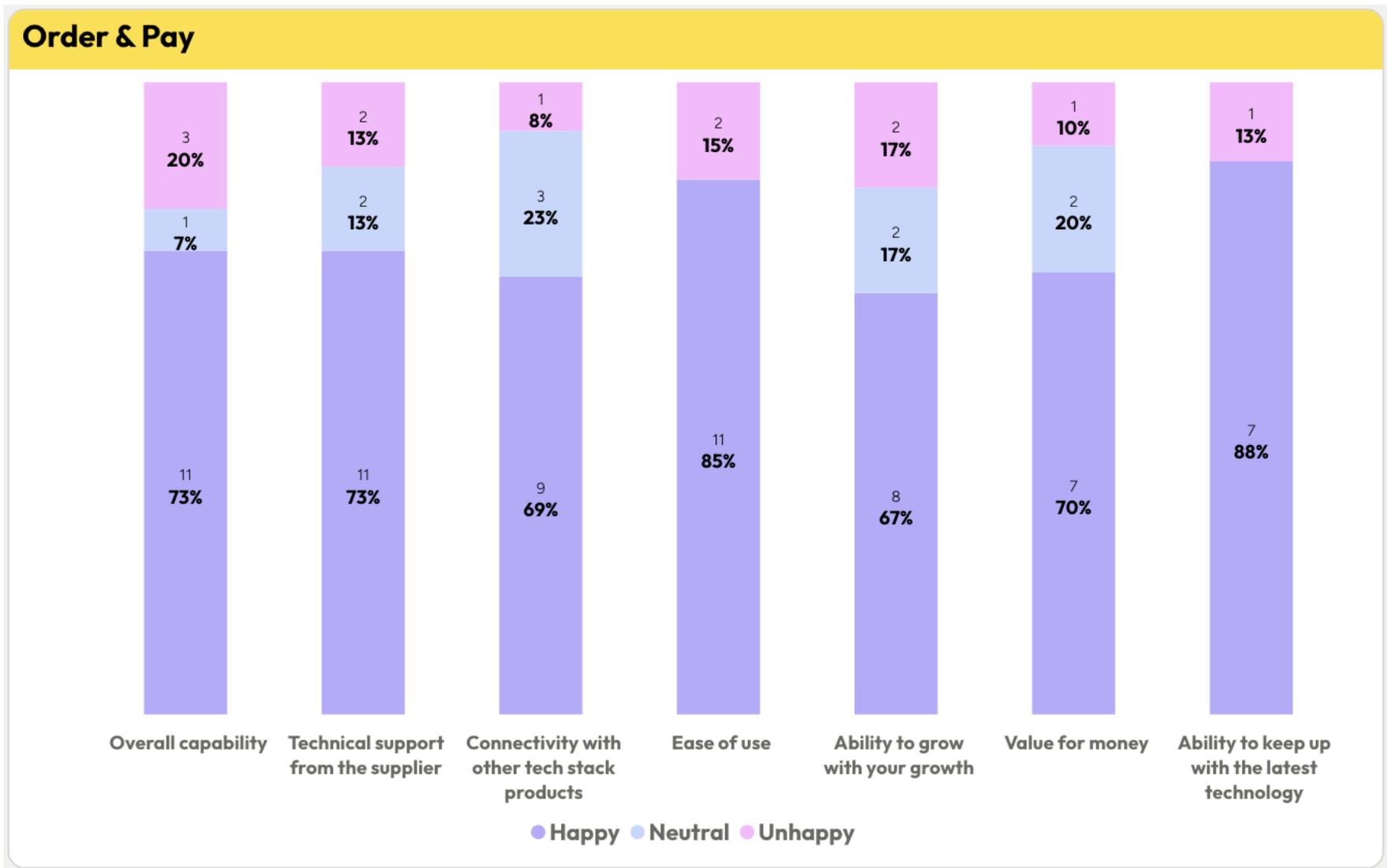
Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment scores for online reservation systems



Findings are based on limited sample sizes and are intended to provide directional insight

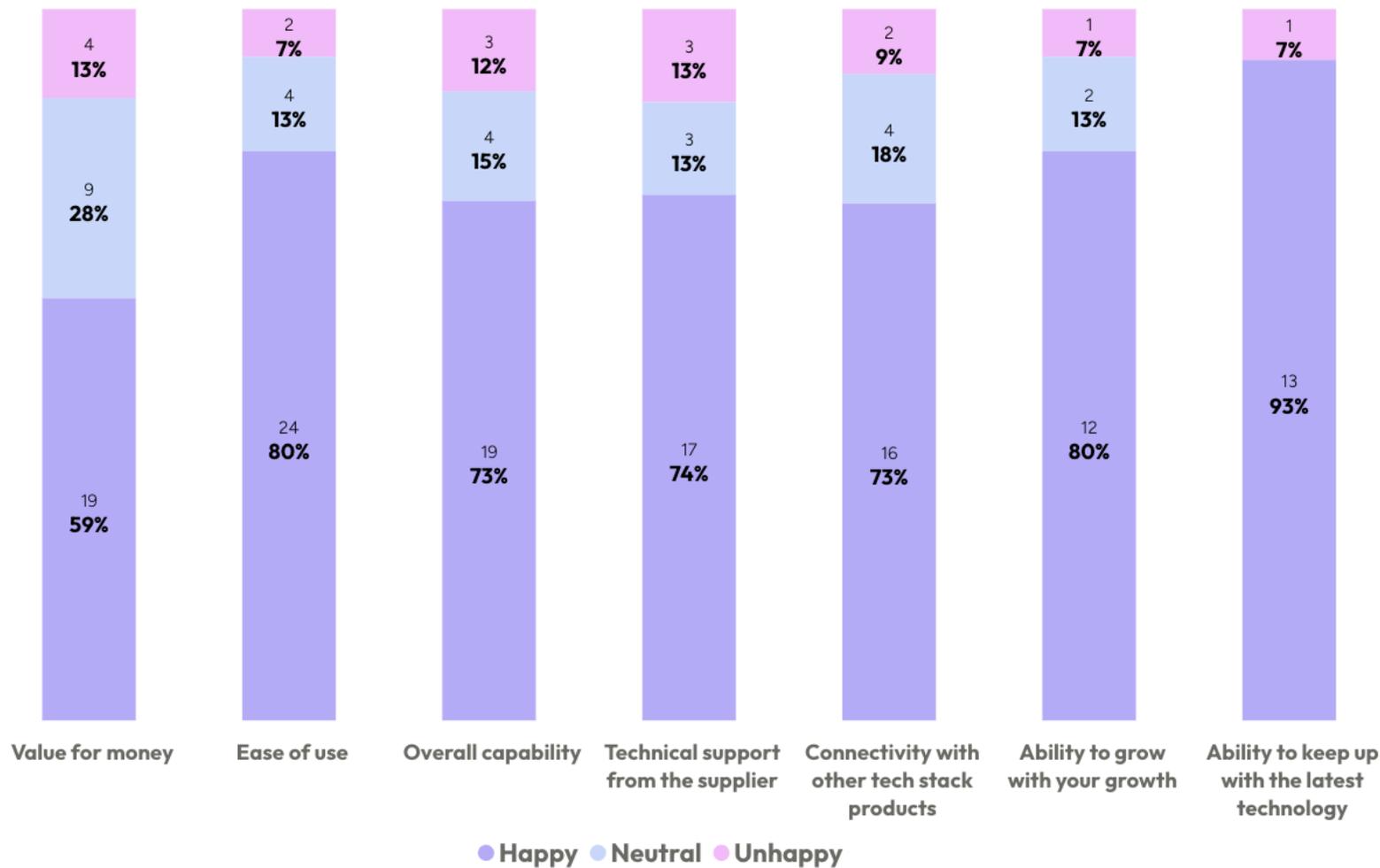
Sentiment scores for order & pay providers



Findings are based on limited sample sizes and are intended to provide directional insight

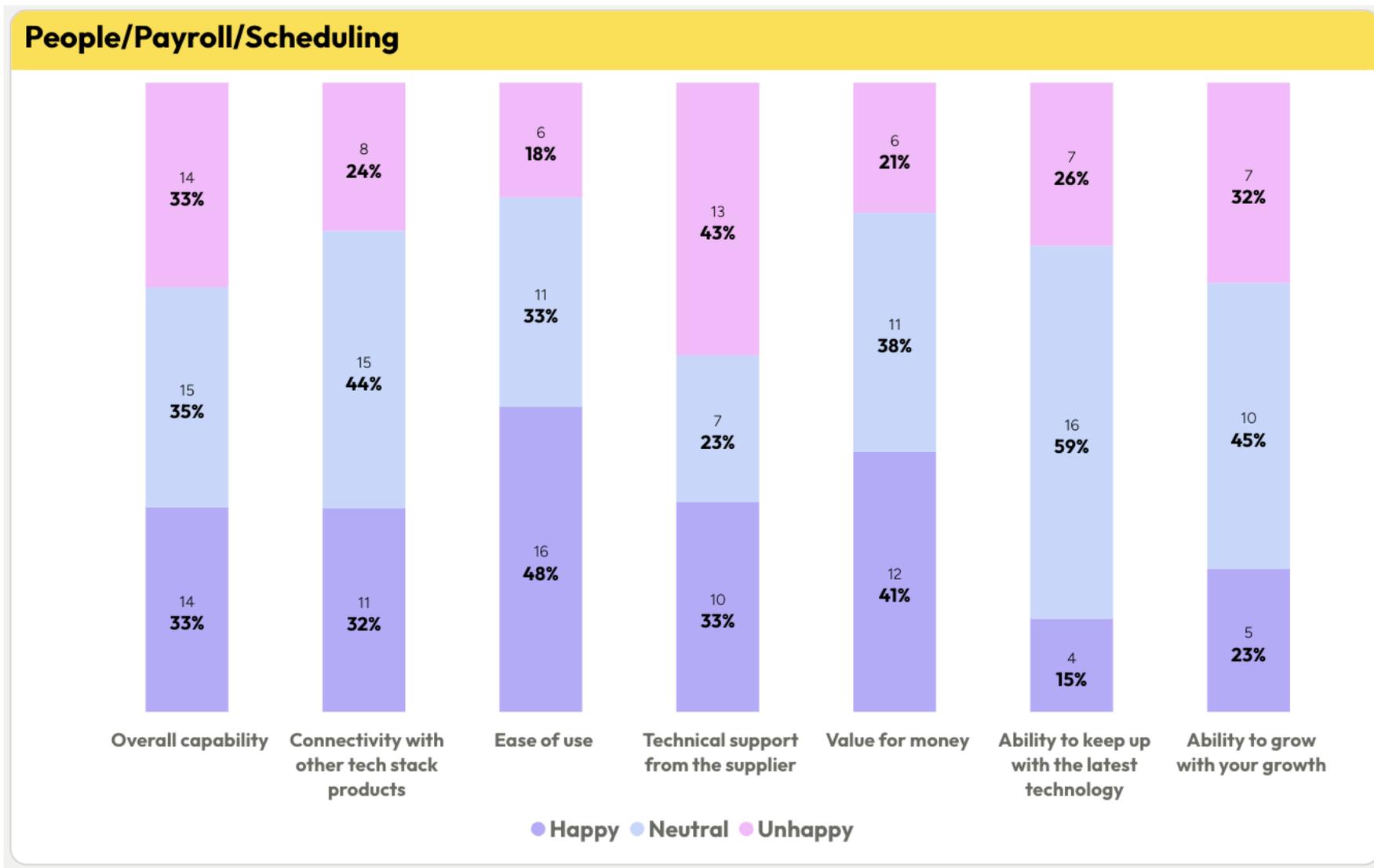
Sentiment scores for payment processing

Payment Processing



Findings are based on limited sample sizes and are intended to provide directional insight

Sentiment scores for people, payroll & scheduling tools

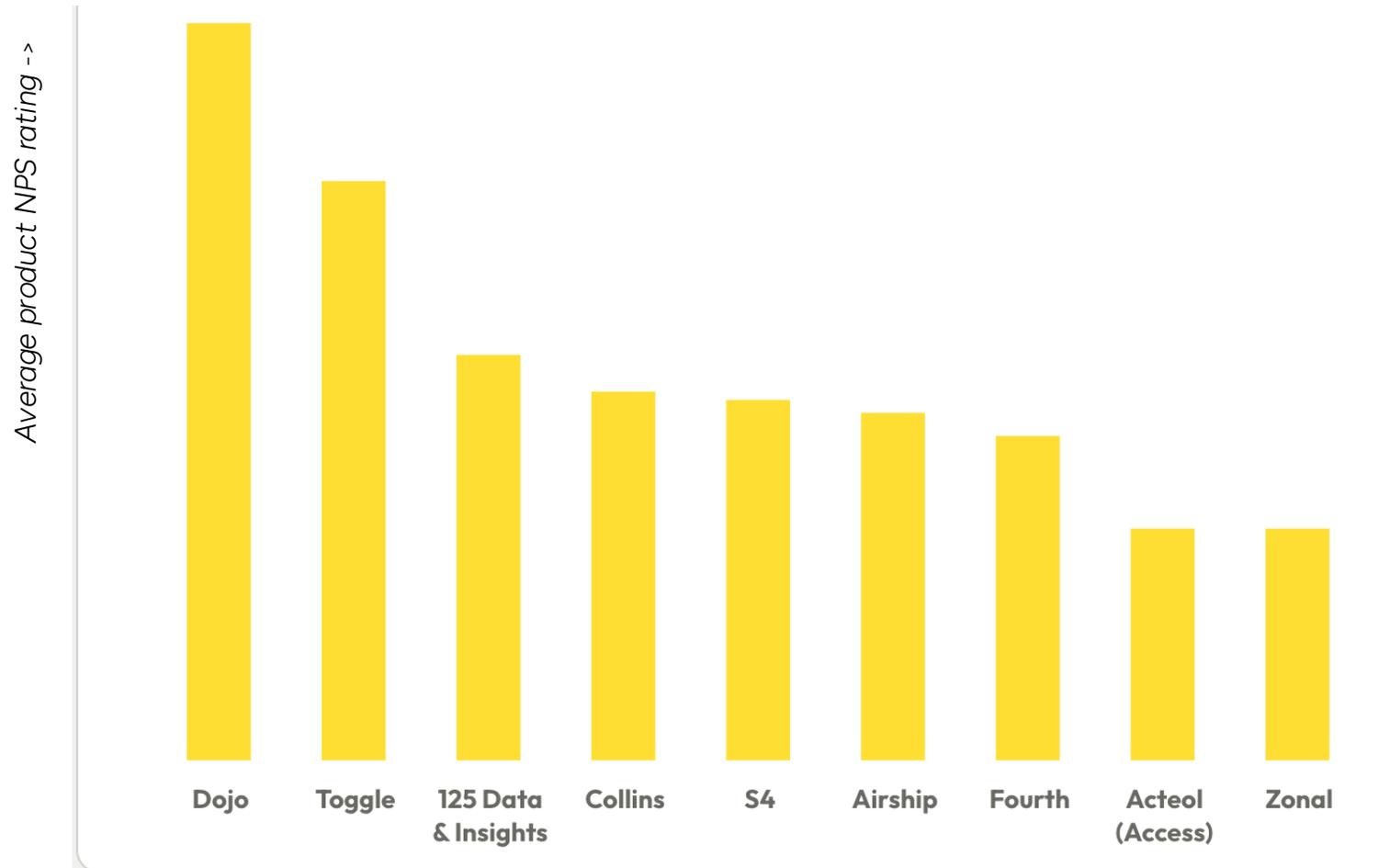


Findings are based on limited sample sizes and are intended to provide directional insight

Data breakdown by sub-sector and scale

Top-rated products by industry segment – Pubs & Bars

This bar chart illustrates which tech tools received the highest NPS ratings amongst respondents from Pubs, Bars & Late-night. Tech tools with fewer than three responses are not shown as the average score could be skewed by the small sample size.

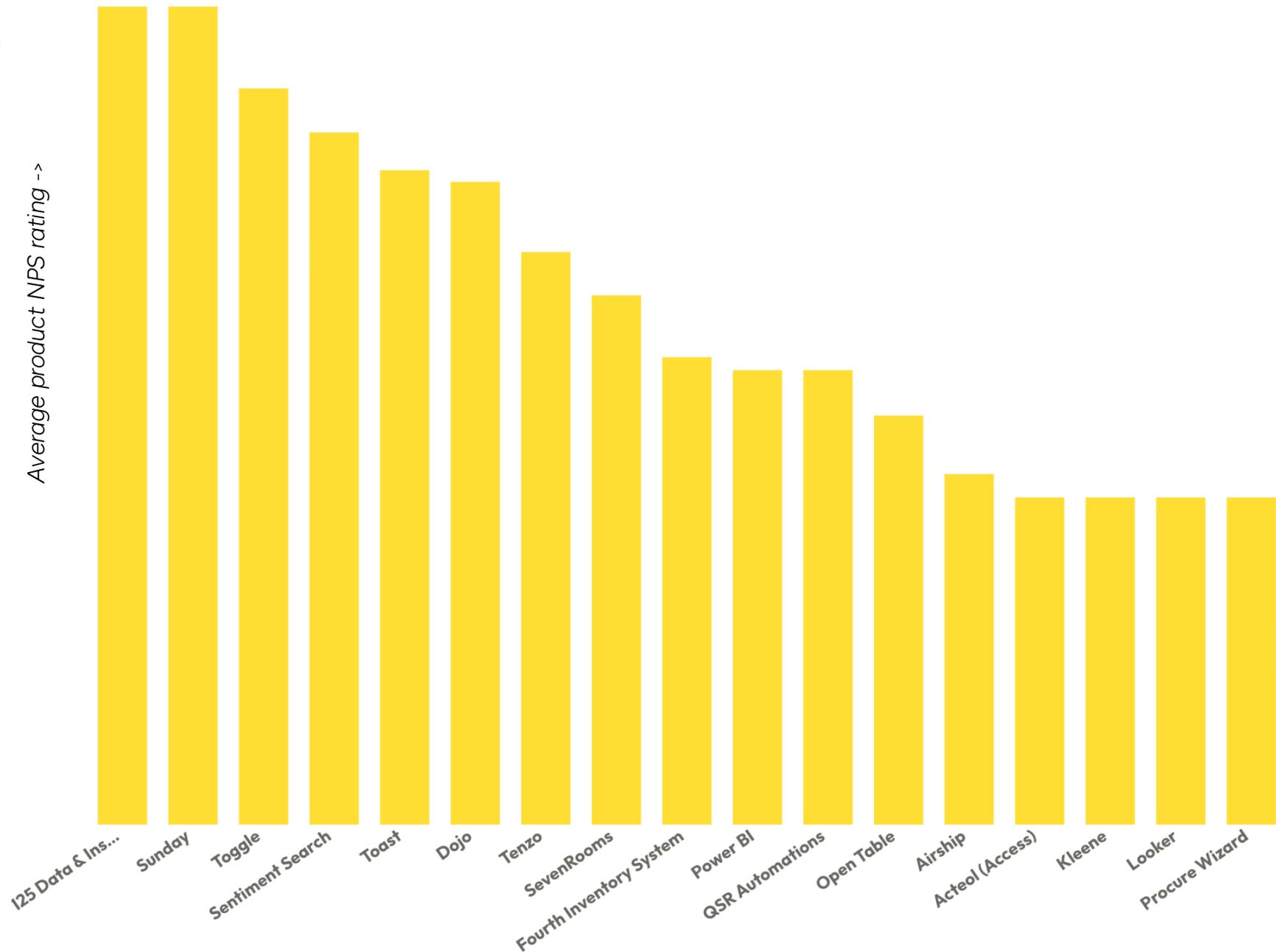


Top-rated in Casual Dining

This chart illustrates which tech tools received the highest NPS ratings amongst the Casual Dining respondents.

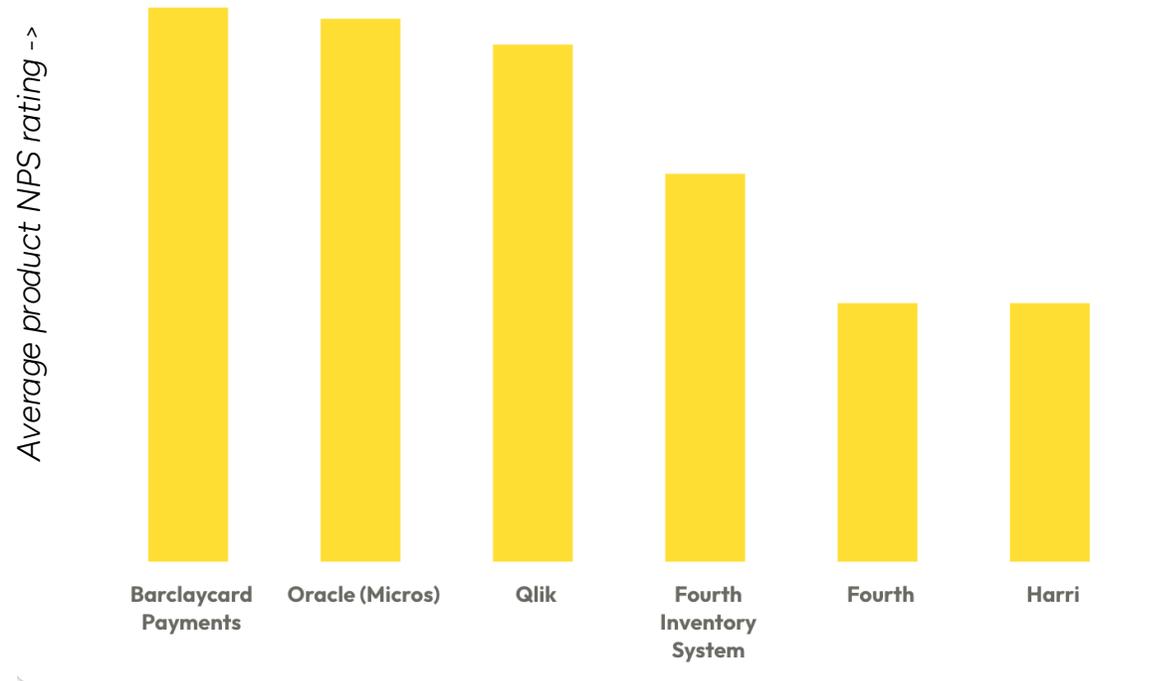
The range of platforms used in this segment of the industry was far greater than in the Pub, Bar and Late-night segment.

Tech tools with fewer than three responses are not shown as the average score could be skewed by the small sample size.



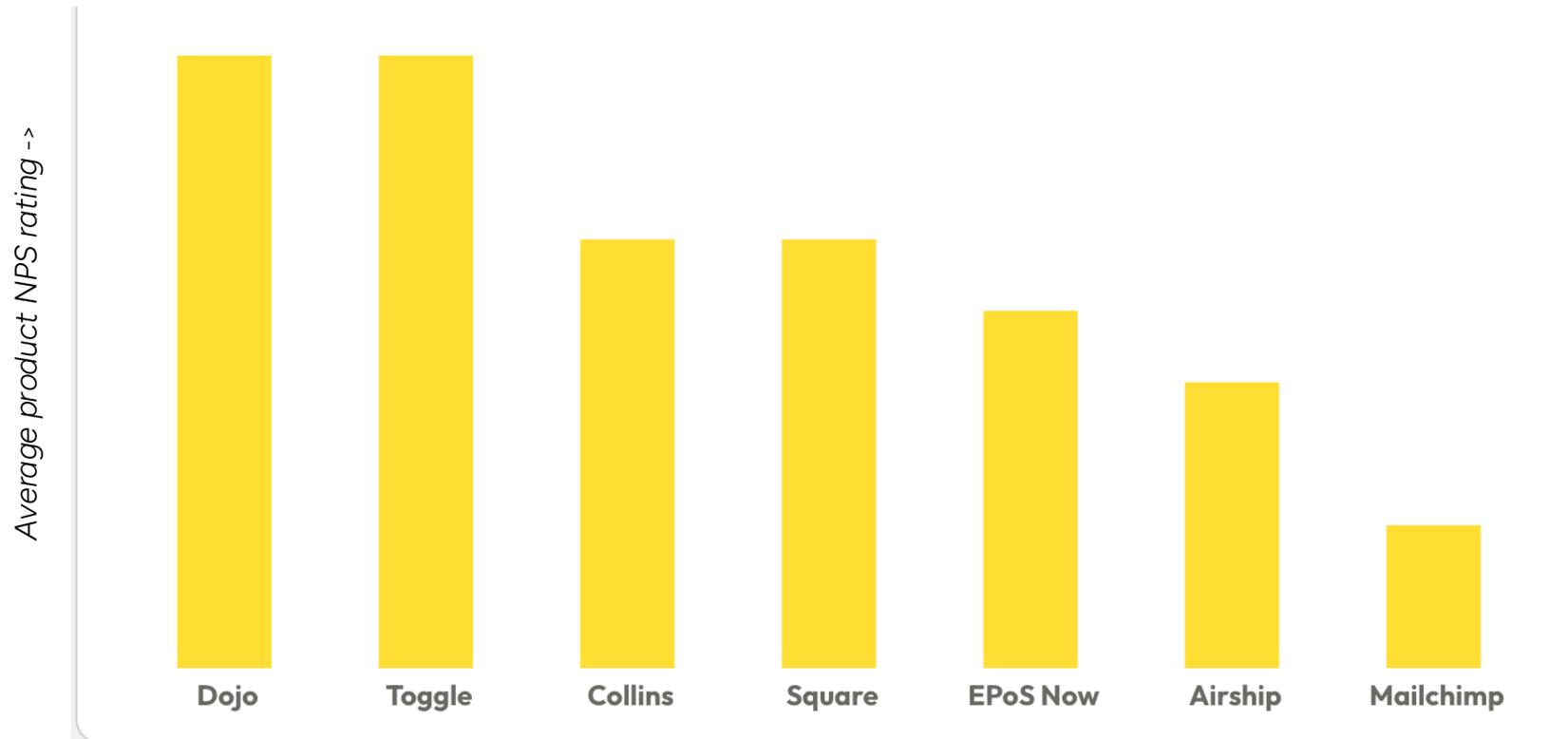
Top-rated for QSR

This chart illustrates which tech tools received the highest NPS ratings amongst QSR respondents. Tech tools with fewer than three responses are not shown as the average score could be skewed by the small sample size.



Top-rated for SME

This chart illustrates which tech tools received the highest NPS ratings amongst SME respondents. Tech tools with fewer than three responses are not shown as the average score could be skewed by the small sample size.

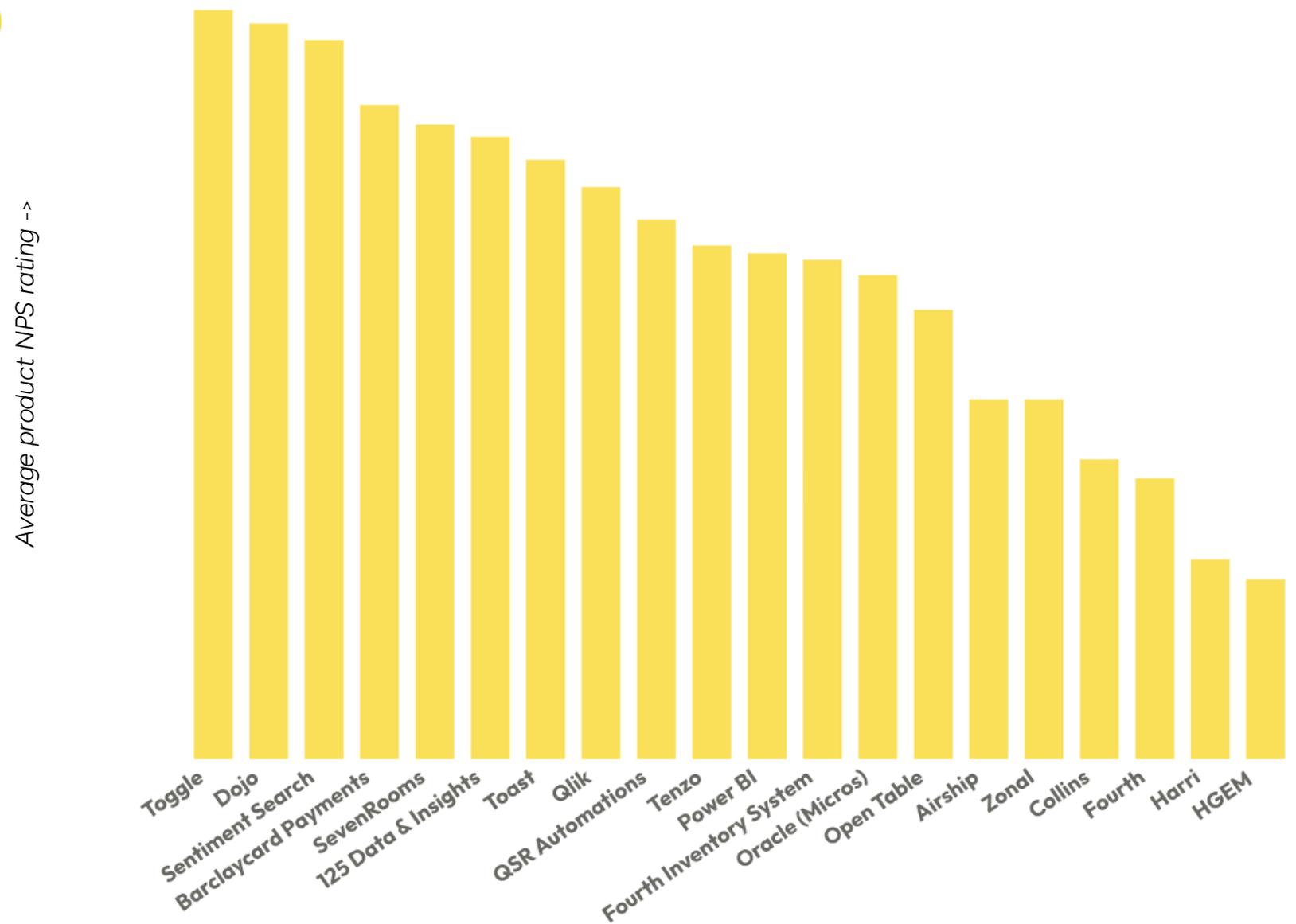


Top-rated for Enterprise

This chart illustrates which tech tools received the highest NPS ratings amongst Enterprise scale respondents.

The range of platforms used by Enterprise scale businesses is much broader than at the SME end of the scale.

Tech tools with fewer than three responses are not shown as the average score could be skewed by the small sample size.



Concluding comments

- Thank you to all the operators that completed the survey. It is our hope that more will do so in the future, ensuring the breadth and depth of insight this research provides will continue to develop over time.
- The team at 125 Insights team put this report together under the guidance of the Hospitality Sector Council. The findings of the survey have been summarised to make them easier to digest, but if participants would like to understand the data or methods used in greater detail, they can contact the team at clientsupport@125insights.com for more information.

