

103 UK OPERATORS

RESEARCH REPORT · 2026

RIGHT TECH, WRONG PLACE

Where UK hospitality is really losing guests, and the thirty seconds operators refuse to hand to a machine.



100%

say the welcome, the first thirty seconds, should never be automated

50%

lose the guest in the queue, before a single order is taken

10%

run a dedicated tool to read what guests are telling them

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THIS REPORT EXPLORES

Where guests go missing. The point in the journey operators say they lose people.

The human line. The moments operators will and will not automate.

The feedback lag. How quickly a flagged problem turns into a change.

Where the tech should go. Matching tools to the actual pinch points.

SERVICE IS A SEQUENCE, NOT A SCREEN

A guest visit is a chain of small moments. They find you. They arrive. They wait, or they do not. They order. They are fed. They pay. They either come back, or they quietly stop.

Every one of those moments is now touched by technology. Kiosks, apps, QR codes, kitchen screens, forecasting tools, review

platforms. The industry has spent a decade buying it.

What this research asks is simpler and more awkward. **Is the tech in the right place?**

These 103 operators are not short of systems. They are short of systems sitting where the guest feels the friction.

THE THESIS

TECHNOLOGY ADDS TO THE GUEST JOURNEY. IT DOES NOT REPLACE THE PEOPLE IN IT. SO THE PROBLEM IS NOT THE TECH. IT IS WHERE WE ARE PUTTING IT.



"We spend every day with operators, from independents to multi site groups, and the message never changes. Tech should make life easier, not harder. Half of them told us they lose people in the queue, then told us they have nothing watching the queue. This report is a mirror. Sometimes an uncomfortable one."

Chris Fletcher

Founder and CEO, Stacked



WHY WE BACKED THIS RESEARCH

Operators do not need more software. They need the software they already have to sit in the right place, talk to everything else, and hand their teams back the moments that matter.

“We built Cinchio around a single idea. One platform, so the guest journey and the back of house stop being two separate conversations. Ordering, payments, the kitchen, the data, and now guest sentiment, running on the same rails. This research says something we hear constantly on site visits. The queue and the follow up are where operators lose people, and those are exactly the places a connected platform earns its keep.”



Jon Horsfield

Chief Revenue Officer, Cinchio Solutions

FRONT OF HOUSE

Kiosks, mobile ordering, POS and payments on one menu engine

BACK OF HOUSE

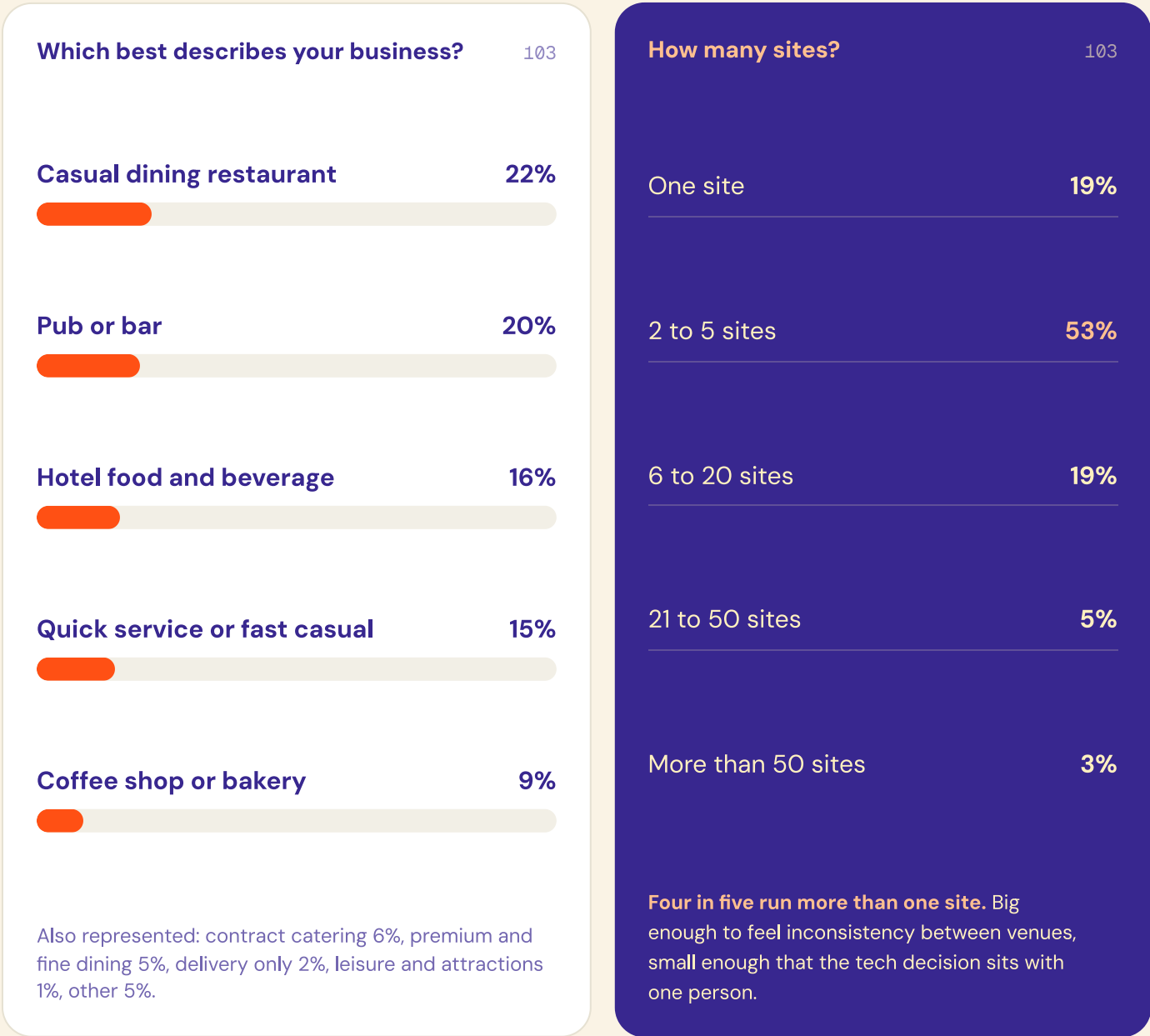
Kitchen management, inventory, production planning, timeclock

THE LOOP BACK

Tatvam guest sentiment, tied to the decision it should trigger

103 OPERATORS, THREE MINUTES EACH

Twelve questions, all tick box bar one, so an operator could finish it on their phone between services. It walks the guest journey end to end, asks how feedback is actually captured, and pins down where AI and kiosks belong.



THE GUEST IS LOST BEFORE THEY ORDER

Asked where they most often lose a guest they could have had, operators did not point at the food, the bill or the booking. Three quarters pointed at the wait.

Where do you most often lose a guest you could have had?

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In the queue when they arrive

50%

Waiting to order

25%

After the visit, they just do not come back

25%

Not a single operator chose: before they find us · at booking · waiting for food · at payment · we do not know.

40%

name **waiting too long** as the biggest guest frustration, the top answer by a distance. Half lose the guest in the queue. Two questions, one answer.

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ALSO NAMED AS FRUSTRATIONS

Not being noticed or acknowledged 20%

Awkward tech, apps, QR codes, screens 20%

Price versus what they get 19%

Nobody chose "nothing much, we are in good shape".
Nobody chose order errors or inconsistency either.

WHAT IT MEANS

The losses cluster before the order and after the visit. Three quarters go missing before anyone takes an order, and the last quarter simply never return. Both are invisible on a P&L.

Cinchio's research adds a warning: going quiet, not getting angry, is a stronger predictor of a customer leaving than complaining. The guest who never comes back rarely told you why.

Source: Journal of Service Research 2024, 840,000+ customer interactions

HEARING IT IS NOT THE SAME AS CHANGING IT

Operators are confident they find out when a guest has a bad time. Two thirds say almost always. The problem is what happens next.

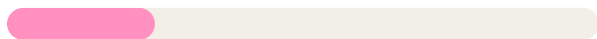
How is feedback collected?

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Staff asking, face to face 50%



Email after the visit 25%



Another channel of their own 25%



Zero uptake: QR or receipt surveys, Google and TripAdvisor, social comments and DMs, delivery platform ratings, loyalty accounts. Yet Cinchio's research finds QR and mobile feedback gets more honest answers.

When feedback flags a real problem, how quickly does something change?

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34% | Same day

33% | Within a week

33% | Within a month

An almost perfect three way split. Whether a guest problem gets fixed today or in four weeks is a function of the operator, not the problem. Nobody admitted to never fixing it.

10%

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ONLY ONE IN TEN OPERATORS RUNS A SENTIMENT OR REVIEW ANALYSIS TOOL.

For the rest, feedback is gathered by hand and read by whoever has a spare ten minutes. That is why response time ranges from same day action to as long as a month. Not a care problem, a capacity problem, and the most automatable job in the survey.

FROM CINCHIO'S RESEARCH: THE GUESTS YOU NEVER HEAR FROM

cinchio
solutions

27% of unhappy customers make a formal complaint. The rest say nothing.

1 IN 26 unhappy guests tell the business directly. Nearly all tell their friends.

So "we almost always find out" is really "we find out from the few who speak up". **Tatvam** pulls every review and comment into the platform that runs ordering, POS and the kitchen, so the quiet majority shows up too.

Sources: Institute of Customer Service, UKCSI 2023 · Newell Légnier, Understanding Customers

THE LINE OPERATORS WILL NOT CROSS

We asked operators to name one guest moment that should never be handed to a machine, and one they would hand over tomorrow. The first answer was unanimous.

NEVER AUTOMATE

100%

THE WELCOME. THE FIRST THIRTY SECONDS.

All 103 chose the same moment. On a twelve option question, that is as close to consensus as research gets.

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HAPPY TO HAND OVER TOMORROW

50%

Recommending what to order

50%

Taking payment

Nobody volunteered the welcome, the goodbye, a complaint or a special request. Choosing and paying, nothing else.

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83%

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Automated, but with a human reading it first

Asked how they respond to feedback, most chose automation **with human review**. Only 5% let it run fully automatically, 10% reply on the platform it arrived from, 3% only when something is very good or very bad. The same instinct as the welcome: let the machine do the work, keep a person on the meaning.

WHY THE HUMAN REVIEW MATTERS

Operators will automate the **transaction**, choosing and paying. They will not automate the **relationship**. Cinchio's research shows why the reply is part of the relationship.

33%

of customers are lost for good after one poor response

+34%

loyalty after an outstanding recovery, more than if nothing went wrong

Sources: Dimensional Research 2013 · Warwick University, service recovery paradox

WHAT IS ALREADY ON THE FLOOR

Of the technologies we asked about, kitchen technology is the most established. The arrival, the wait and the follow up are the least covered.

Which of these are you already using?

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Kitchen display system

50%

Self service kiosks

25%

AI forecasting or production planning

25%

Nobody at all is using order at table by QR or app, online booking, chatbots or voice AI, automated rotas, personalised marketing, or a dedicated sentiment tool. Six categories, zero adoption.

What does adding self service do to your team?

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50%

say it frees the team up for genuinely guest facing work

Nobody said it meant fewer people, moved staff to the back, or added work. The other half answered in their own words rather than picking an option.



WHAT IT MEANS

The stack has been built inside out. Strongest where the operator feels the pain, weakest where the guest does. The queue and the follow up were left to good intentions and a busy manager.

Six categories have zero adoption, and five of them sit at the front door or in the follow up. The gap is not appetite. Half already run a kitchen screen. It is placement.

FOUR FINDINGS, FOUR PLACES TO PUT THE TECH

50%

lose guests in the queue

Take the transaction off the counter

Kiosks and mobile ordering absorb the ordering queue, so the person on the till can stand at the door instead. One menu engine keeps kiosk, mobile and till prices identical.

40%

say waiting too long is the top frustration

Route orders straight into the kitchen

Orders land on kitchen management the moment they are placed, with production planning and inventory on the same numbers. No printer to chase, no ticket to rekey.

10%

read sentiment with a tool

Let something else do the reading

Tatvam reads every review, survey and comment, tags it by theme and site, and surfaces the pattern rather than the anecdote. Face to face stays where it is, it just stops being the only channel anyone can see.

33%

say change can take as long as a month

Put the evidence next to the decision

When sentiment, sales and kitchen timings sit in one platform, a complaint lands beside the data that explains it. The manager gets an answer in a shift, not a project.

THE CINCHIO FEEDBACK PLAYBOOK

Make it effortless. QR codes and low friction prompts get more honest feedback.

Route it smart. Happy guests go to public platforms. Unhappy guests come to you first.

Track the trend. One view across every platform, tagged by topic, not a snapshot.

COMPLAINTS ARE NOT THE ENEMY. APATHY IS.

SIX MOVES, THEN THE POINT

01 Time your queue before you buy anything

One week, one clipboard, arrival to acknowledgement. The easiest and cheapest number in this report to get.

02 Staff the first thirty seconds on purpose

A named person on the welcome for every service, on the rota. All 103 operators agree this one is not negotiable.

03 Automate the transaction, not the relationship

Choosing and paying are fair game. Greeting, apologising and winning someone back are not. Audit your stack against that line.

04 Give feedback a deadline, not a folder

Flagged today, answered this week, then hold the business to it. The even split in this data is a governance gap.

05 Read sentiment at scale, then act at site level

Face to face is the richest feedback you will get and the least searchable. Pair it with something that reads everything else.

06 Count the integrations, not the features

Every tool that does not talk to the others becomes a manager's admin job. Ask what it connects to before you ask what it does.

WHY IT PAYS, FROM CINCHIO'S RESEARCH

2X

revenue growth for NPS
leaders versus
competitors

5X

more likely to forgive a
mistake if they are a
promoter

+1%

revenue growth for every
7 point rise in NPS

Sources: Bain & Company · Temkin Group · London School of Economics



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