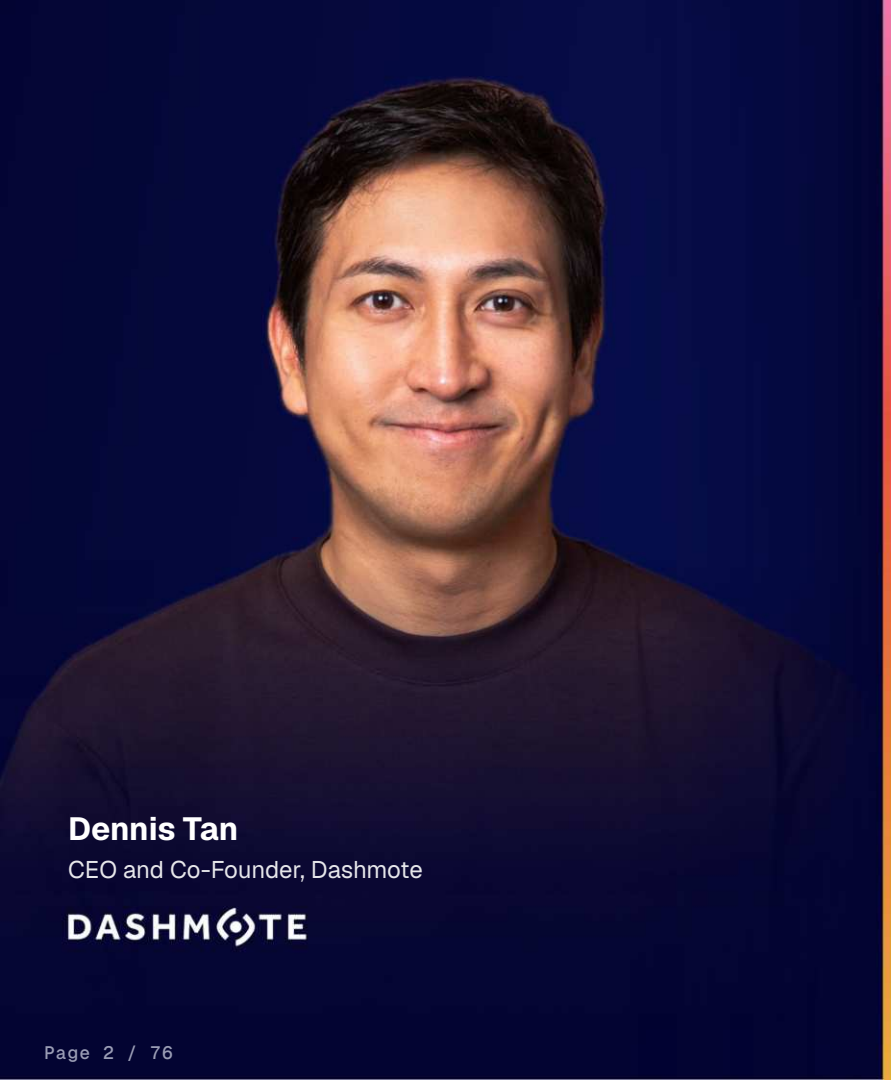
prosus Ventures x DASHMOTE

November 2026

Restaurant Technology Report 2026





Dennis Tan
CEO and Co-Founder, Dashmote

DASHMOTE

“Technology is transforming how restaurants interact with their guests, and every restaurant now runs its own set of software, from payments and loyalty to reservations. Yet it is hard to see who uses what, and where. Stefan and I built Dashmote exactly for this: to bring transparency, venue by venue and city by city, follow the trends locally, regionally and globally, and see where the opportunities are.”

“AI agents may soon choose where people eat. But an agent can only act when a restaurant’s systems let it in. This report shows that door is still wide open: restaurants run a patchwork of local tools, and no one has yet become their operating system. That’s where we want to invest: in the companies that make every restaurant readable, bookable and orderable by agents.”



Purpose of this report

This report maps the global restaurant technology market: who leads in point of sale (POS), online booking, online ordering, loyalty, and card and dining rewards, and where the market is heading.

FIVE SYSTEMS

- POS
- Online booking
- Online ordering
- Loyalty
- Card and dining rewards

FIVE REGIONS

It covers global trends and looks closely at the United States, Europe, India, Brazil and Asia Pacific.



The main finding: restaurant software is still local and fragmented, and no one owns the stack yet. As AI agents start to choose and book restaurants for consumers, the companies that connect restaurants to those agents have an opening. The race to fill it has started.

Restaurant software is still local and fragmented, and the race to own it has started

1

Most restaurants run little or no software, so the prize is still largely unclaimed.

A large share of venues show no system at all, and many that do run just one. Those that use tech buy it one tool at a time, from different vendors, and few trust any single supplier with the whole stack.

Adoption follows price: in Europe, expensive restaurants take bookings online; more affordable ones rarely do.

PRICE AND BOOKING P. 21



Restaurants want their own storefront, but many still rent one from a delivery company, for convenience.

Loyalty is going the same way, with card issuers' rewards schemes now reaching far more venues than restaurants' own programs.

REWARDS AND LOYALTY P. 18



2

Winners are local, and the leader changes at almost every border.

Each country, often each city, has its own booking, ordering and POS leaders.

Global players hold the US, UK and Australia; local platforms hold Europe and India.

Habit shapes the stack as much as software does, with WhatsApp serving as Brazil's second delivery channel.

Consolidation has begun, but the buyers are coming from outside the category: delivery apps, card issuers and private equity, all trying to assemble the restaurant's operating system before anyone else does.

3

AI agents can find restaurants; booking through them is live but small, and ordering is rarer still.

AI AGENTS P. 7



Diners already ask assistants where to eat.

The constraint is access: an agent can only act where a restaurant's systems let it in, and many restaurants today are visible only inside the booking tool they happen to use. Whoever opens that door first sets the terms.

4

Funding is rising again, led by a handful of large US rounds.

Funding peaked in the post-pandemic boom, fell for two years and has recovered strongly this year.

Most of it has gone to a few American companies; Europe's share is small and concentrated.

Unicorns are being minted again, valuations are at a record, and Wonder has filed for an IPO.

Global trends

What we found in the markets we measured

1. AI AGENTS
Most AI use stops at finding a restaurant

2. LOCAL LEADERS
Each market has its own leading vendors

3. CHAT ORDERING
WhatsApp is Brazil's second-biggest delivery channel

4. ONE VENDOR OR MANY
Few New York places use one vendor for everything

5. REWARDS AND LOYALTY
Card and dining rewards sit beside restaurant loyalty

6. ORDERING ON GOOGLE
Restaurant-branded pages are the delivery apps' answer to direct ordering

7. PRICE AND BOOKING
Price shapes online booking more than venue type or chain status



SYSTEMS ON THESE PAGES

- POS
- Online booking
- Online ordering
- Loyalty
- Card and dining rewards

Most AI use stops at finding a restaurant



1 Find

in any AI assistant



2 Book

in any AI assistant



3 Order

in ChatGPT, Gemini, Claude

in the app's own assistant



4 Pay

in ChatGPT, Gemini, Claude

in the app's own assistant

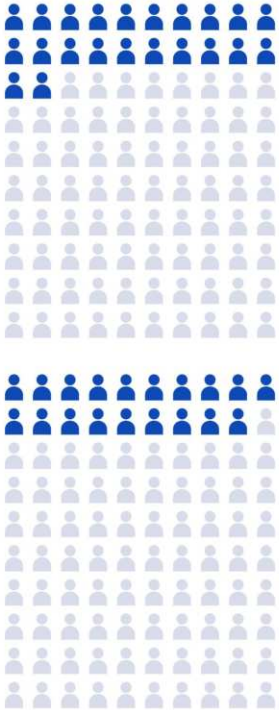
	1 Find	2 Book	3 Order		4 Pay	
	in any AI assistant	in any AI assistant	in ChatGPT, Gemini, Claude	in the app's own assistant	in ChatGPT, Gemini, Claude	in the app's own assistant
United States	In use	In use, small	Rarely used	Live	Narrow	Beta
Europe	In use	Live	Not yet	Live	Not yet	Not yet
Brazil	Live	Announced	Not yet	Live	Not yet	Live
India	Live	Live	Test	Pilot	Test	Not yet

in use: use reported · live · early: small, narrow, beta or pilot · announced · not yet

Source: company announcements and press, Oct 2025 to Nov 2026: iFood via Forbes Brasil; Swiggy; Google; DoorDash; Just Eat Takeaway.com; Booking Holdings; Digital Commerce 360; Canaltech; YouGov; Inc42; Yext; Mobile Time; Zonal and NIQ; Zomato developer documentation (GitHub). Statuses as of Nov 2026. Prosus holds about 21% of Swiggy.

OpenTable is on most AI assistants' booking lists

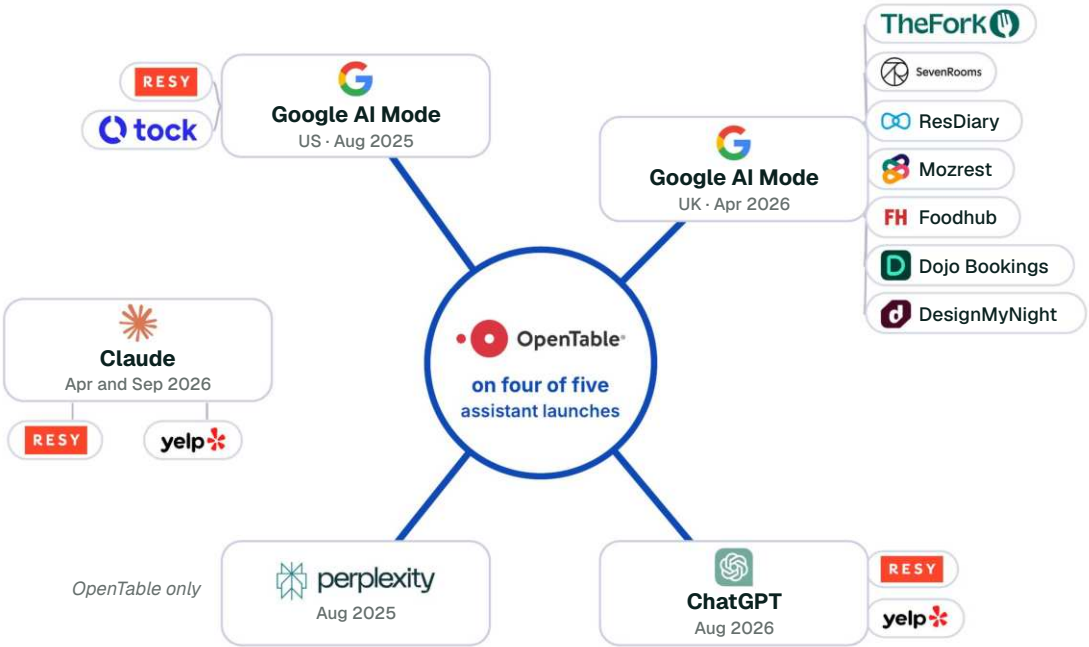
Diners already ask AI where to eat



22%
of US consumers have used an AI tool to help choose a restaurant

19%
of UK consumers use AI tools to plan a visit to a pub, bar or restaurant

Which booking platforms each AI assistant books through



Source: DoorDash, May 2026; Zonal and NIQ, Oct 2026; Google, Aug 2025 and Apr 2026; OpenAI, Aug 2026; Perplexity, Aug 2025; Anthropic, Nov 2026.

Personal AI agents rarely order food yet

Personal AI agents that shop for you

Meta Muse

More than 10 million people in the US and Canada have set up Meta's Muse, a personal AI agent that also works inside WhatsApp.

Meta says shopping is Muse's most common use.

Instinct

Instinct, a personal agent in early access that people text or call, raised $1B at a $10B valuation.

Instinct lists ordering groceries among its tasks.

Alexa+

Alexa+ takes Uber Eats and Grubhub orders by conversation.

Toqi

Toqi (Prosus) finds products, compares prices, reviews and delivery options, and places an order once the user approves; it cannot pay on the user's behalf.

What shoppers say, three surveys

US diners who would order through an AI chatbot given the right offer (PAR)



US consumers who used an AI tool to shop in the past month (NIQ)



US grocery shoppers very excited to hand part of their shopping to an AI agent (Bain)



US consumers who have used a fully autonomous AI agent to place orders (NIQ)



What the delivery apps see

Uber Eats counted about 500 delivery orders started by an AI agent in one week.

A repeat order in the Uber Eats app takes a median of 90 seconds.

Source: Meta, Oct 2026; Instinct, Sep and Nov 2026; Amazon, Mar 2026; PAR, Aug 2026; NIQ, May 2026; Bain via Consultancy.uk, Jul 2026; Uber, Nov 2026; Prosus, Nov 2026.

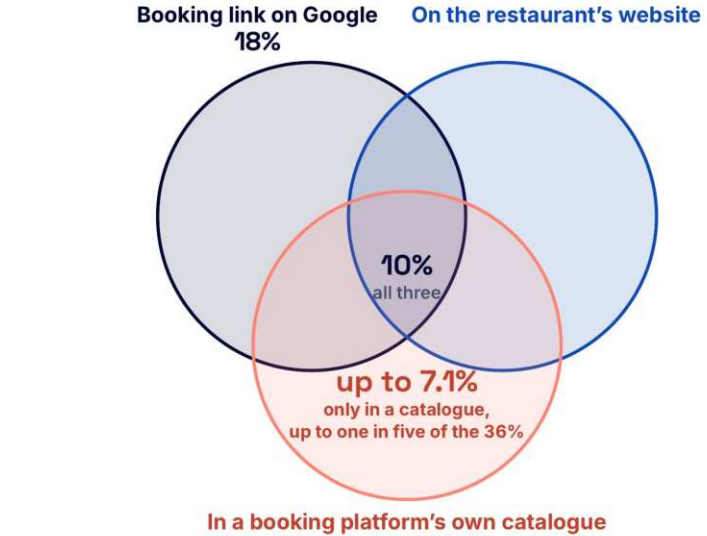
Most restaurants in six European cities show no online booking

Where restaurants in six cities show online booking

All 47,834 restaurants in the six cities

36% take bookings online | **up to 64% show no online booking**

The 36% that take bookings online, by where the booking shows:



Shares of all restaurants; circles not to scale. 'Up to': a booking link or tool we do not see is not counted.

No online booking seen, per city



Of those that take bookings online, about half show a booking link on Google.

Source: Dashmote restaurant technology data, Oct 2026.

Three ways AI agents could reach restaurants



Diner

1 Personal agents work for the diner

platform gate

Meta Muse · OpenAI dots · Claude Duet · Grok Bot · Instinct · Toqi

Toqi is Prosus' AI assistant for daily life (App Store, May 2026).

2 Platform agents keep the customer at home

Amazon: Alexa+, Buy for Me · OpenTable Concierge · Booking Holdings' Lola · iFood's Ailo in WhatsApp · Ask DoorDash, Text DoorDash · Uber cart assistant

DoorDash CEO Tony Xu: for "a task that's as simple as ordering food, we tend to see that come directly to DoorDash" (Q3 call, Oct 2026).

3 Deals: agents talk to agents

OpenAI · Meta Muse — agreed terms — OpenTable

OpenTable's integration with OpenAI seated 190,000 diners in Sep 2026 (Booking Holdings Q3 call). OpenTable also became the first dining partner of Meta's Muse.



Restaurant

For the owner

Claude Duet

A South Florida restaurant owner with about 110 staff has used Claude Duet for accounting, customer support and marketing.

toast IQ

Toast IQ has an assistant that can update menus or edit shifts (Oct 2025).

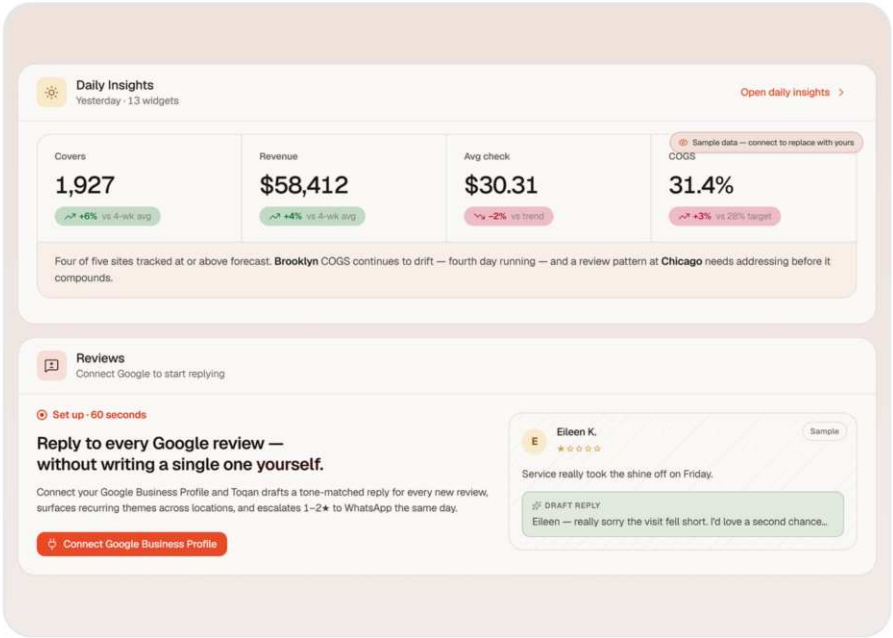
Square in ChatGPT and Claude

Square lets US restaurants take orders placed directly in ChatGPT and Claude.

The gate: Resy deactivated two diners' accounts after their AI agents hunted for tables (both later reinstated; American Express owns Resy), and Amazon blocked Meta's Muse from shopping on Amazon.com in Sep 2026.

Source: company announcements and earnings calls, Jul 2025 to Nov 2026; Restaurant Business, Sep 2026; VentureBeat, Aug 2026; TechCrunch, Engadget, Skift and GeekWire, Sep 2026; The Infatuation, Nov 2026. iFood is a Prosus company.

Toqan handles the back office for restaurant owners



Toqan for Restaurants, sample screen

1. We connect your systems
2. AI analyzes your patterns
3. You stay in control

Restaurants signed up within months of launch.

prosus x toqan

Toqan is Prosus' AI agent platform. It was launched in June 2026 to restaurants and other SME. The no-code platform connects to a restaurant's existing systems, helping with scheduling, stock ordering, admin and marketing; the owner approves each suggestion.

The Toqan agent also helps restaurant owners benchmark against nearby venues, handle reviews and track their social presence, drawing on Dashmote's venue and menu data.

What Toqan does

INTELLIGENCE	OPERATE	GROW
Analyze data	Manage orders	Create offers
Optimize offerings	Schedule staff	Generate content
Grow sales	Handle reviews	Track socials

Source: Toqan website, Nov 2026; Prosus, Nov 2026.

Dashmote's data shows Toqan how guests see a restaurant

A 360° view of the restaurant, from three sources

toqan

Its connected systems
THROUGH TOQAN
POS, suppliers, scheduling tools, delivery platforms

DELIVERY
Thuisbezorgd.nl ifood

POS AND ORDERING
toast vita mojo
Square foodticket

STAFF AND STOCK
shiftbase apicbase

MAPS AND TRACKING
Google Maps Traccar



Toqan Intelligence
THROUGH TOQAN
Margins, peak periods, order times, marketing, staff scheduling

DASHMOTE

How guests and the market see it
FROM DASHMOTE, IN THE TOQAN FEED
Local creators
Nearby menus and prices
Ratings and review topics
Instagram presence
Local demand and busy hours

"In the age of AI, partners work together through AI itself. Toqan knows a restaurant from the inside; over our MCP server, Dashmote adds what guests see and say, and what nearby venues do."



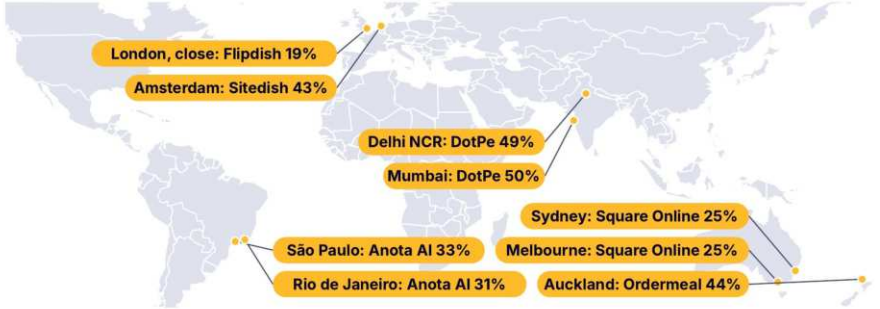
Stefan Tan
Co-Founder, Dashmote

Each market has its own leading vendors

Online booking

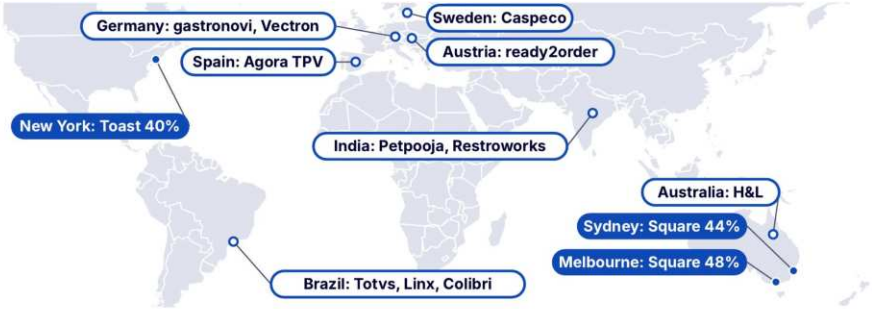


Online ordering

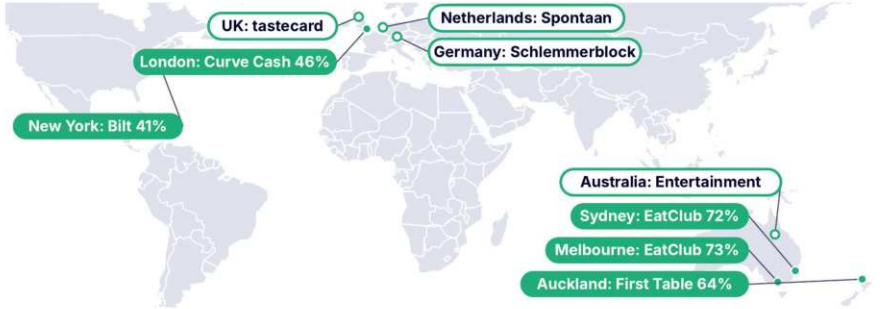


POS

No POS leader in London (p. 54).



Card and dining rewards

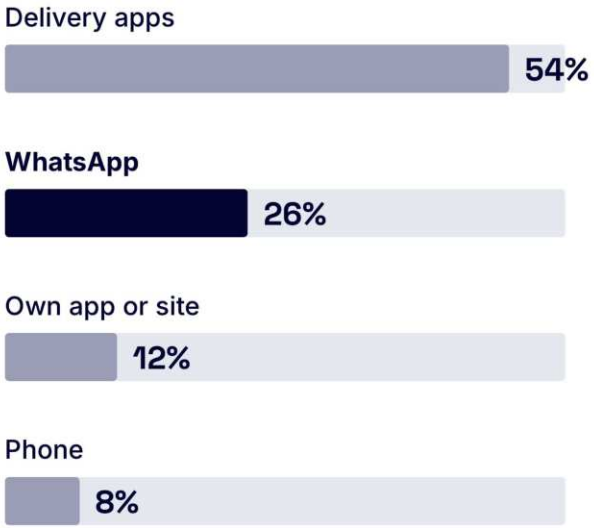


Filled labels: the leader Dashmote measured, with its share of places in cities; close: No. 2 within 5 points. Outlined labels, no %: active in the market; Dashmote does not measure them.

Source: Dashmote restaurant technology data, Oct 2026; company websites and app listings, Nov 2026; Vectron, 2025; Caspeco, Jun 2025; BW Disrupt, Oct 2025; H&L, 2025; Brazil Journal, Feb 2026; Prosus, Nov 2026. iFood, a Prosus company, invested in Anota AI in 2022 and owns Get In. Prosus holds about 21% of Swiggy. PayU, part of Prosus, has invested in DotPe. Prosus has invested in Bilt.

WhatsApp is Brazil's second-biggest delivery channel

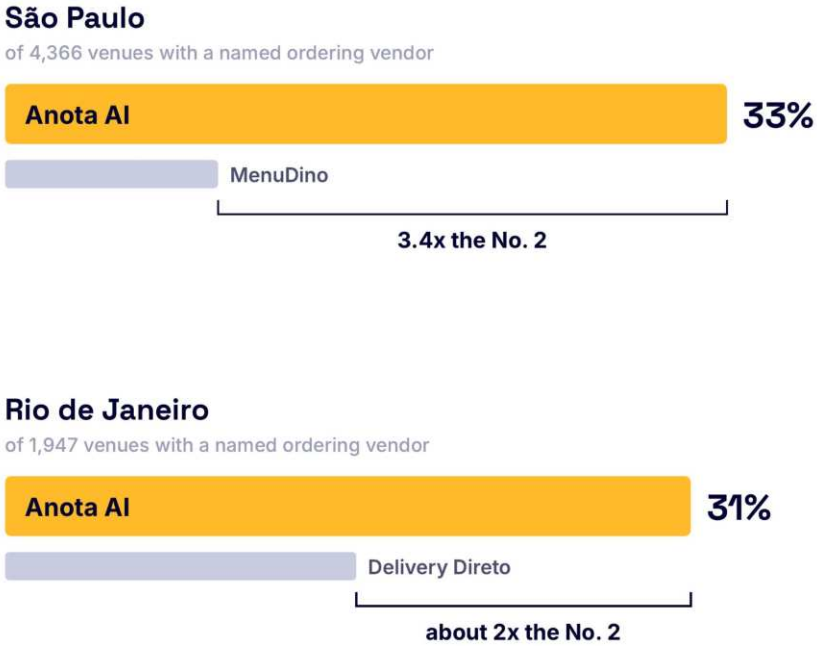
Delivery revenue by channel, Brazil



63% of delivering venues use WhatsApp.

Owners' estimates (Abrasel, Mar 2025); WhatsApp is still second in Abrasel's 2026 survey.

Anota AI, a WhatsApp-first ordering vendor: share of venues with a named ordering vendor



Source: Dashmote restaurant technology data, Oct 2026; Abrasel, Mar 2025; Abrasel and 99Food, Sep 2026. iFood, a Prosus company, invested in Anota AI in 2022.

Larger companies keep buying restaurant software

Delivery apps 2

DELIVERY APP — JUN 2025

DOORDASH + SevenRooms

DoorDash completes SevenRooms (about $1.15B).

DELIVERY APP — OCT 2026

Uber + ezcater

Uber agrees to buy ezCater.

Investors 2

INVESTOR — JUL 2025

PSG + zenchef + COVERMANAGER

PSG Equity combines Zenchef and CoverManager: more than 36,000 restaurants in 20+ countries.

INVESTOR — SEP 2025

THOMABRAVO + olo

Thoma Bravo completes Olo take-private (about $2.0B).

Software and AI companies 3

VOICE AI COMPANY — JAN 2026

Deepgram + OfOne

Deepgram, a voice AI company, buys OfOne, which takes drive-thru orders by voice.

SOFTWARE GROUP — APR 2026

ClearCourse + kurve

ClearCourse buys Kurve Kiosks, a UK maker of self-order kiosks.

SOFTWARE GROUP — JUL 2026

HARRIS + TouchBistro

Harris (Constellation Software) buys TouchBistro, a restaurant POS company.

Card issuer and supplier 2

PARTS SUPPLIER — JUN 2026

Parts Town + 86 Repairs

Parts Town, a restaurant equipment parts supplier, buys 86 Repairs, repair software for restaurants.

CARD ISSUER — NOV 2026

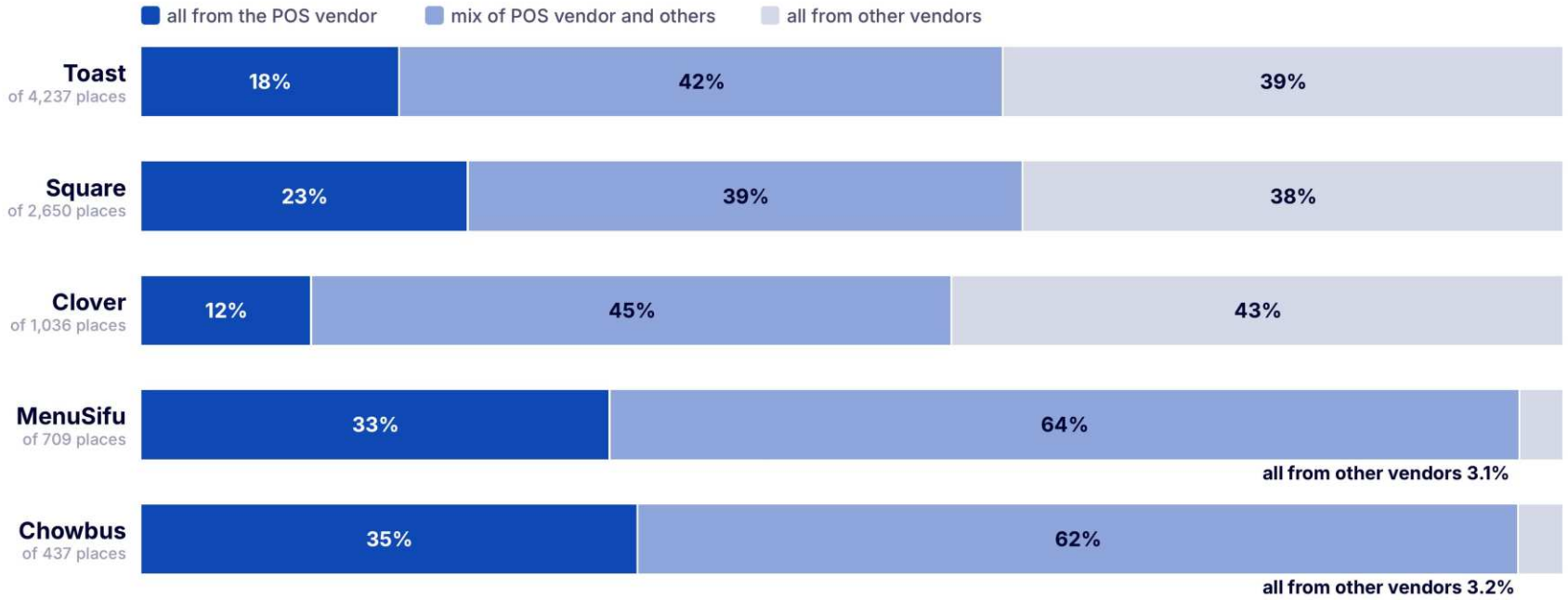
AMERICAN EXPRESS + TheFork

American Express completes its purchase of TheFork.

Source: DoorDash, Jun and Aug 2025; PSG, Jul 2025; Thoma Bravo, Sep 2025; Dealroom.co, Q3 2026; Restaurant Dive, Oct 2026; Uber, Nov 2026; Tripadvisor and TheFork, Nov 2026.

Few New York places use one vendor for everything

New York POS places: who supplies ordering, booking and loyalty



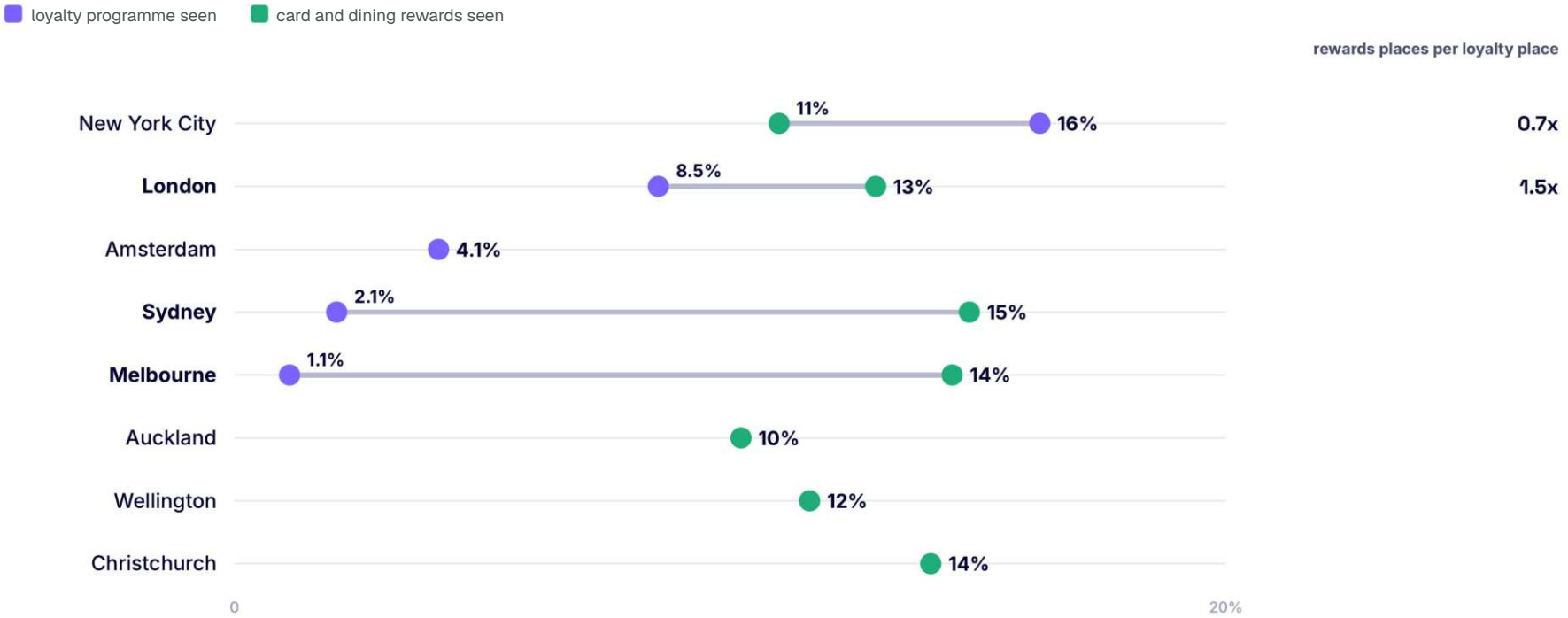
Of Toast places with a second system, four in five use at least one system from another vendor.

Base: places with that POS and at least one other system seen.

Source: Dashmote restaurant technology data, Oct 2026.

Card and dining rewards sit beside restaurant loyalty

Own loyalty programme seen against card and dining rewards seen, per city



Of eating and drinking places. No dot: no reading. Sydney and Melbourne: chains' own loyalty schemes are not read.

Source: Dashmote restaurant technology data, Oct 2026.

Platforms around restaurants are moving into advertising

Who offers ads or paid visibility around restaurants

BOOKING AND DISCOVERY		
OpenTable	OpenTable launched OpenTable Media in Feb 2026: brands buy ads on its site and in email, targeting across other channels, and bookable experiences.	paid by brands
	Restaurants can pay OpenTable for promoted spots in search results, priced per seated guest.	paid by restaurants
yelp	Restaurants, retail and other businesses buy ads on Yelp.	paid by restaurants and local shops
POS AND GUEST SOFTWARE		
toast	Toast lets restaurants run Google and Meta ad campaigns from inside Toast.	paid by restaurants
PAR Punchh	PAR's Punchh Guest360 ties marketing campaigns to POS transactions and item-level revenue.	paid by restaurants
DELIVERY APPS		
Just Eat Takeaway.com	JETads, launched in Nov 2026: restaurants pay for premium visibility in search and browse, and brands buy ads.	paid by restaurants and brands
AI ASSISTANTS		
ChatGPT	ChatGPT has shown ads to US Free and Go users since Feb 2026, labelled as sponsored and kept apart from answers.	paid by advertisers
Google AI Mode	Google added ad formats labelled Sponsored to AI Mode.	paid by advertisers

At Yelp, ad revenue fell and data licensing grew

Yelp, Q3 2026, $M

Ads: restaurants, retail, other



$99M, down 13%

Other revenue, incl. data licensing



$34M, up 82%

Yelp's other revenue rose 82% to a record $34M, helped by data licensing to OpenAI and Meta.

For scale, a delivery app

Uber's advertising business passed a $2.5B annual run-rate in Q2 2026, growing about 50% a year (global figure).

Source: company announcements and results, Feb to Nov 2026; OpenAI via MacRumors, Feb 2026. Just Eat Takeaway.com is a Prosus company (acquired Oct 2025).

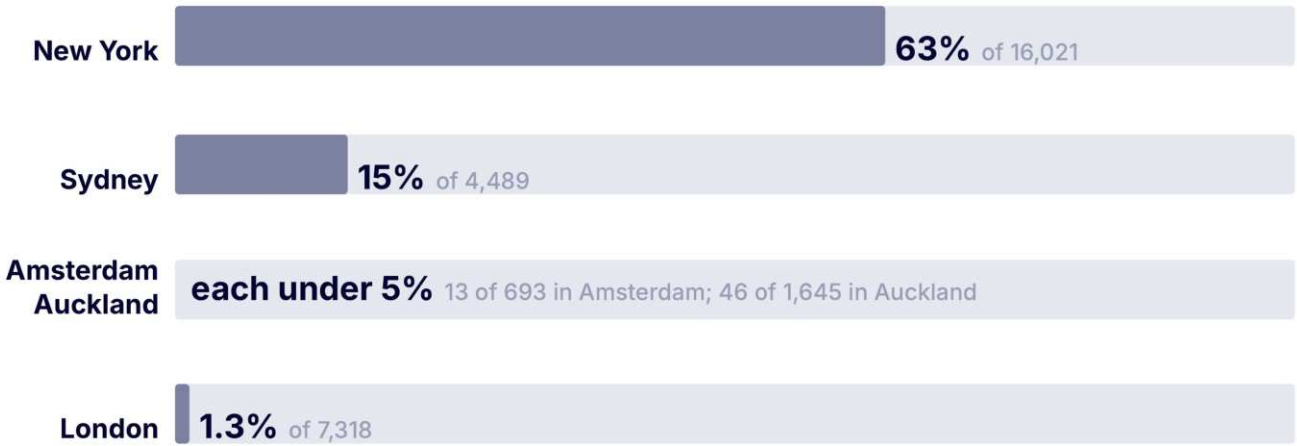
Restaurant-branded pages are the delivery apps' answer to direct ordering

1 **Restaurants take orders on their own pages,** outside the delivery apps.

2 **The apps answer with ordering pages in the restaurant's name:**

- DOORDASH Storefront
- Grubhub Direct
- Uber Eats Storefront
- deliveroo branded ordering

Direct ordering on Google's order button: share where one option is a delivery company's page in the restaurant's name, most common in New York

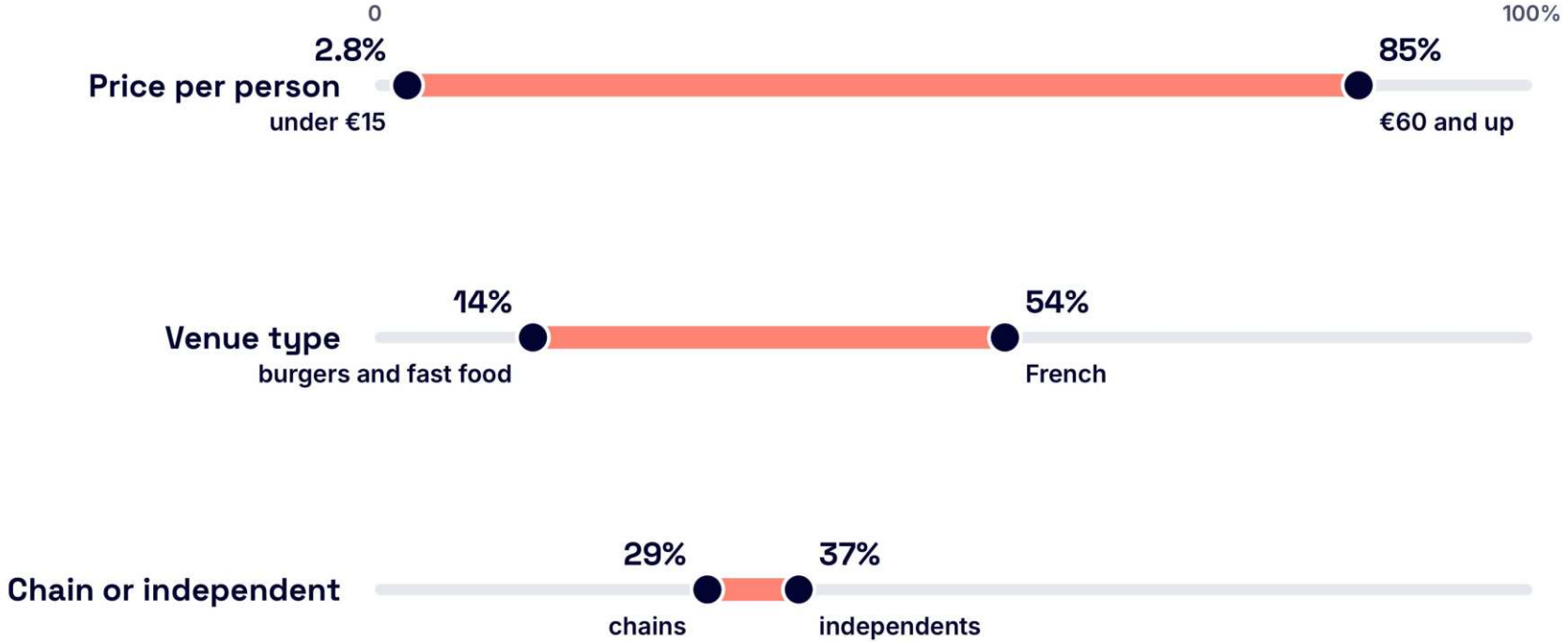


A restaurant's own site can run on a delivery company's software without showing it, so the true shares can be higher.

Source: Dashmote restaurant technology data, Oct and Nov 2026.

Adoption of booking software is mainly a function of price tier; venue type or chain status is less relevant

Share listed on a booking platform: lowest and highest group in each cut



Booking platforms are seen more at full-service restaurants than at fast food.

Source: Dashmote restaurant technology data, Oct 2026.

Follow the money

Funding in restaurant technology, with data from Dealroom.co

WHAT IS COUNTED

Venture rounds, company value and exits in restaurant and shop technology, from Dealroom.co, to the end of Sep 2026.

SCOPE

Company lists show restaurant technology only. Dealroom.co's totals cover restaurants and shops, so a restaurant-focused figure is shown next to them.

THE MONEY

Funding is rising again in 2026, driven by a few very large rounds, mainly in the US.

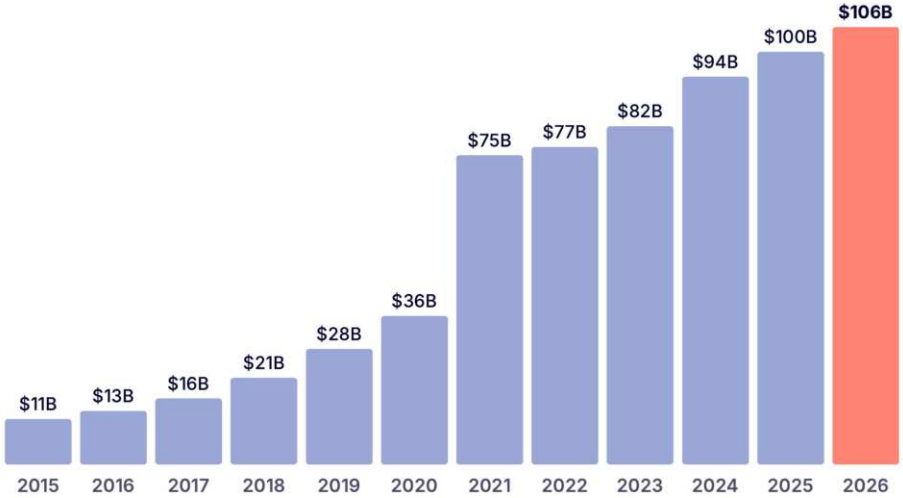
THE LINK TO THIS REPORT

Investors fund ordering, guest and back-office software: the same systems this report measures in each restaurant.



Restaurant tech companies are worth more than ever

Combined value of VC-backed restaurant and shop technology companies, end of each year (2026: latest valuations)



14 restaurant technology unicorns (Dashmote count from Dealroom.co data), two of them since the start of 2025: Owner and SevenRooms. Full list: p. 40.

Unicorns: valued at $1B or more, listed and acquired included. Epos Now counted from Jul 2024.

The most valuable restaurant technology companies, latest valuation

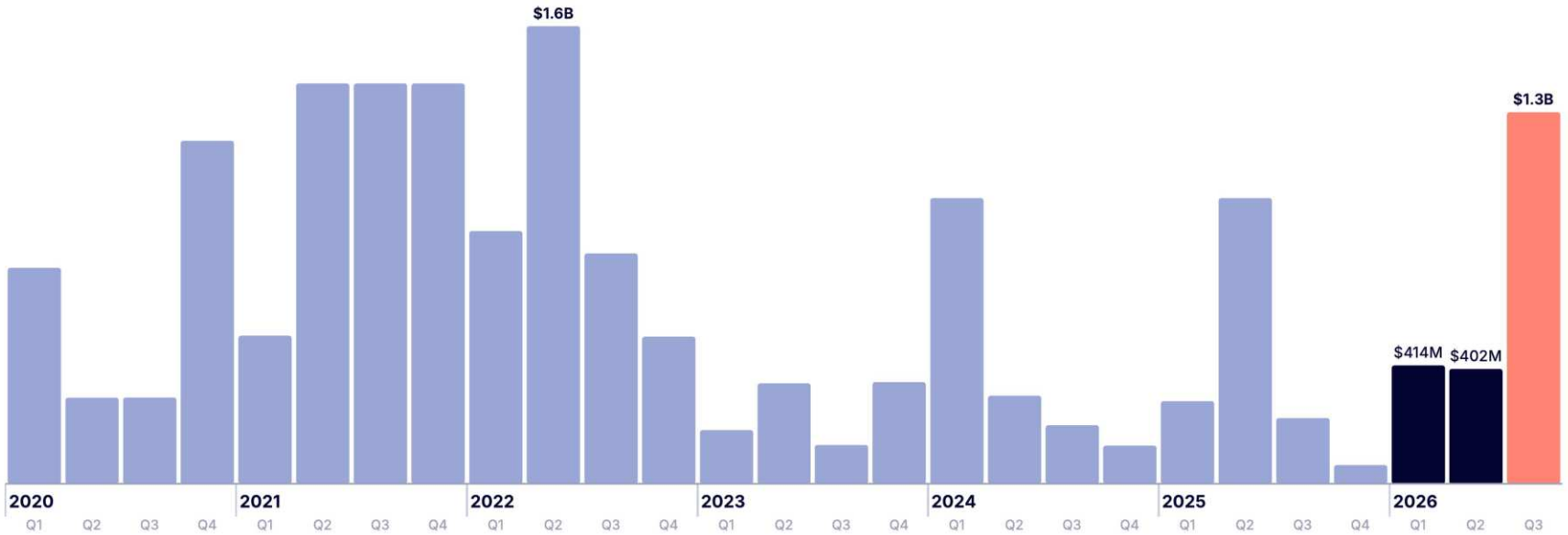


Wonder: pre-money value of its Jul 2026 round.

Source: Dealroom.co, Q3 2026; Thoma Bravo, Sep 2025; Wonder, Jul 2026; Tech East, Jul 2024.

Restaurant tech funding is up again this year

VC investment by quarter in restaurant and shop technology, 2020 to Q3 2026 (dark: Q1 and Q2 2026; orange: Q3 2026)

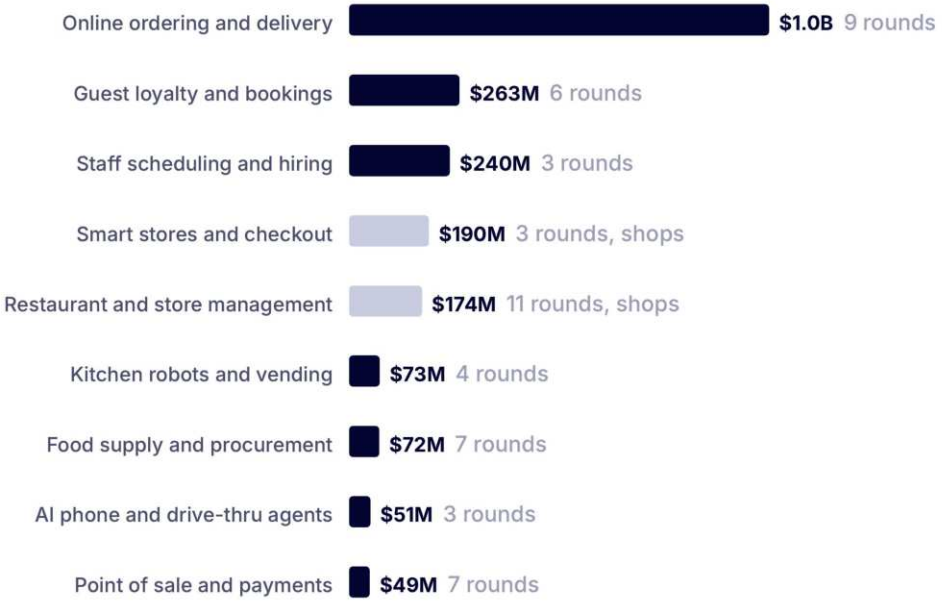


By year: $4.7B in 2021 (peak), $1.0B in 2023, $1.7B in 2024, $1.6B in 2025, $2.2B in 2026 to Q3, about $1.8B of it restaurant-focused. Includes $775M for Wonder (Jul and Sep 2026), which runs restaurants and owns Grubhub.

Source: Dealroom.co, Q3 2026.

Online ordering companies raised the most money this year

By segment, 2026 to Q3 (grey: segments that cover shops)



Restaurant-focused segments: **about $1.8B**. Online ordering and delivery took 48% of all funding, because of **Wonder** (it runs restaurants and owns Grubhub) and **Owner**.

By company headquarters, 2026 to Q3



Europe's own view (p. 55) counts $343M, one round more.

Source: Dealroom.co, Q3 2026.

A few large rounds raised most of the money

Biggest rounds, Q3 2026



Exits of VC-backed companies, Q3 2026

COMPANY BOUGHT	BOUGHT BY	WHEN	PRICE
KAIKAKU United Kingdom	REEF Kitchen operator	Jul 2026	not disclosed
TouchBistro Canada	HARRIS Software group	Jul 2026	not disclosed

Source: Dealroom.co, Q3 2026.

The fastest-growing players by segment

The 92 restaurant technology companies among Dealroom.co's 100 fastest-growing restaurant and shop technology companies by Signal, by segment (number of companies)

■ the ten with the highest Dealroom Signal ▭ also in this report's restaurant data

Point of sale and payments 17

Sunday Choice Scotch Toast Qlub
Fudo Instamenu ESB Clopos MenuSifu
Lightspeed StoreHub MissTipsi Dripos
Foodics Posist Tabit

Guest loyalty and bookings 18

EatClub **inKind** Queues Seated
First Table TVM Media AppFront
Hungry Hub Bikky EazyDiner FoodFan
OneDine Leeroy Eat App Curate
Businesstable TableCheck Superb

Online ordering and delivery 17

Owner **Wonder** Flipdish Slice Kitopi
Takeat Cheaf Slyce.io Cata Goomer
Truffle Kanpla Bite Karma HungryPanda
StiQ Huuva

Restaurant and store management 15

Nory **Tebi** **Petpooja** haddock Sedna
Iiko SUFLEX Zillout Order Squizify
Tenzo FoodOp Winnow Loop AI KITRO

Kitchen robots and vending 10

Unity Coffee Piestro Creator Rotimatic
Daalchini Technologies Bellwether Coffee
Chef Robotics Circus YPC Technologies
Miso Robotics

Food supply and procurement 7

Saltz App KASO Pepper Cut&Dry Supy
Secai Marche Spoiler Alert

Staff scheduling and hiring 4

Skello All Gravy 7shifts Rysto

AI phone and drive-thru agents 4

Slang Hostie Loman AI Arc

Source: Dealroom.co, Oct 2026; Prosus, Nov 2026. Prosus has invested in Foodics.

prosus Ventures x DASHMOTE | FUNDING DATA BY dealroom.co

AI start-ups and scale-ups by region and segment

Independent, privately held companies whose main product is AI or robotics for restaurants

also named on other pages of this report

United States

ROBOTS Botrista, Hyphen, Miso Robotics, XRobotics
STOCK ClearCOGS, Leanpath, PreciTaste
SUPPLY Loop AI, MarginEdge
STAFF Emilia AI, Harri
PAYMENTS AIO
ORDERING Owner
AGENTS Arc, Audivi AI, ConverseNow, Hostie, Kea, Loman AI, Slang
GUEST FineDine, Kutlerri, Tattle

Europe

ROBOTS goodBytz, Macco Robotics
STOCK Apicbase, Fullsoon, Heptic, Kikleo, KITRO, Nory, Orbisk, Peckish, Winnow
SUPPLY optimizes Intelligence, Tomato AI
STAFF All Gravy, Nesto
PAYMENTS Choice
ORDERING Flipdish, SOUS
AGENTS Assistent.ai, Bookline, Joep, One Touch Systems, ROSI, Vox AI

Middle East

ROBOTS Hyper Robotics
SUPPLY KASO
PAYMENTS TABsense
ORDERING GrowDash
Zyda
AGENTS Hi Auto

Latin America

STOCK Alô Chefia
SUPPLY ContaMais
FoodLabs
STAFF Worc
PAYMENTS Fullsite
ORDERING Brendi, Justo, Natural Bot, OlaClick
Takeat
AGENTS Dionísio, Meu Atendente
GUEST Come

Asia Pacific and India

ROBOTS Aniai, Beyond Honeycomb, BOTINKIT, Connected Robotics, Rasoi Robotics, T-chef, TechMagic
STOCK Goals, Restoke
SUPPLY AirPurchase
ToOrder
ORDERING me&u, Optipro
AGENTS DineLine AI, hey buddy

Segments, from the kitchen to the guest

Kitchen **ROBOTS**
Point of sale and **PAYMENTS**
STOCK, forecasting and food waste
Online **ORDERING** and delivery
Food **SUPPLY**, invoices and finance
AI phone and drive-thru **AGENTS**
STAFF, hiring and training
GUEST loyalty, reviews and marketing

A researched list, not a Dashmote count or ranking. Prosus Ventures led Emilia AI's pre-seed round in Sep 2026.

Source: company websites and press, Nov 2026; Dealroom.co, Oct 2026; Prosus, Sep 2026.

prosus Ventures x DASHMOTE | FUNDING DATA BY dealroom.co

United States

TRENDS

In New York, 57% of places show one restaurant tech system or none.

WHAT IS INTERESTING

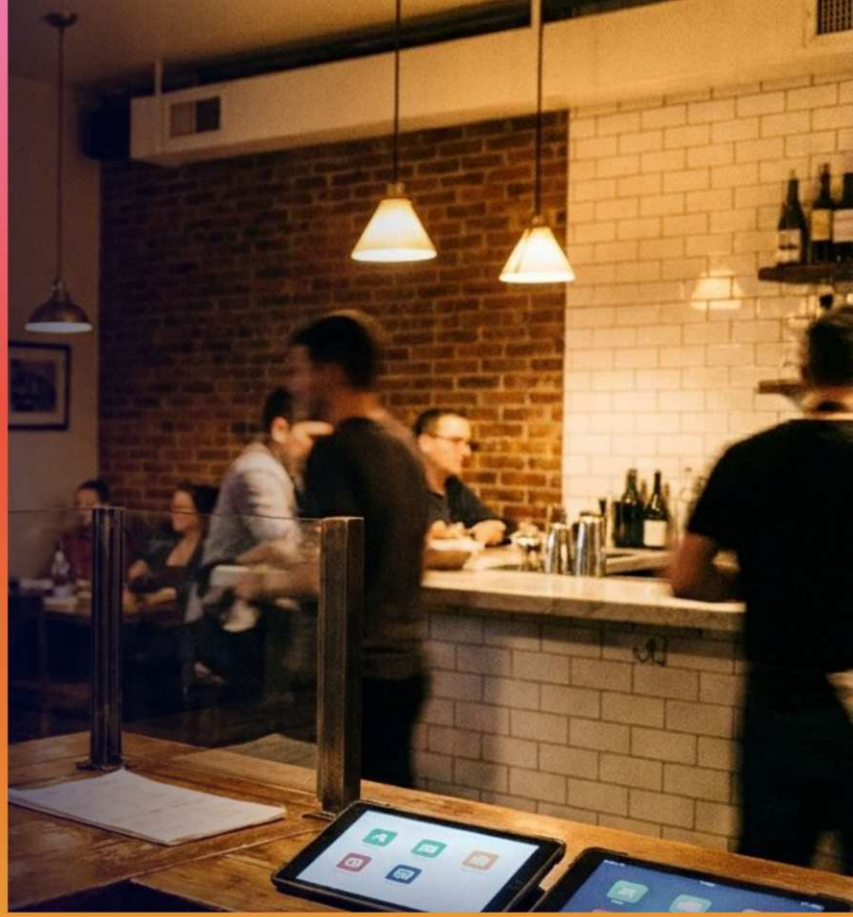
In New York, 63% of places with a direct ordering option on Google show a delivery company's ordering page in the restaurant's name.

WHO WINS WHERE

OpenTable leads online booking nationally: 52% of restaurants on six platforms.

WHICH VENUES

Most New York pizza places with online ordering show Slice.

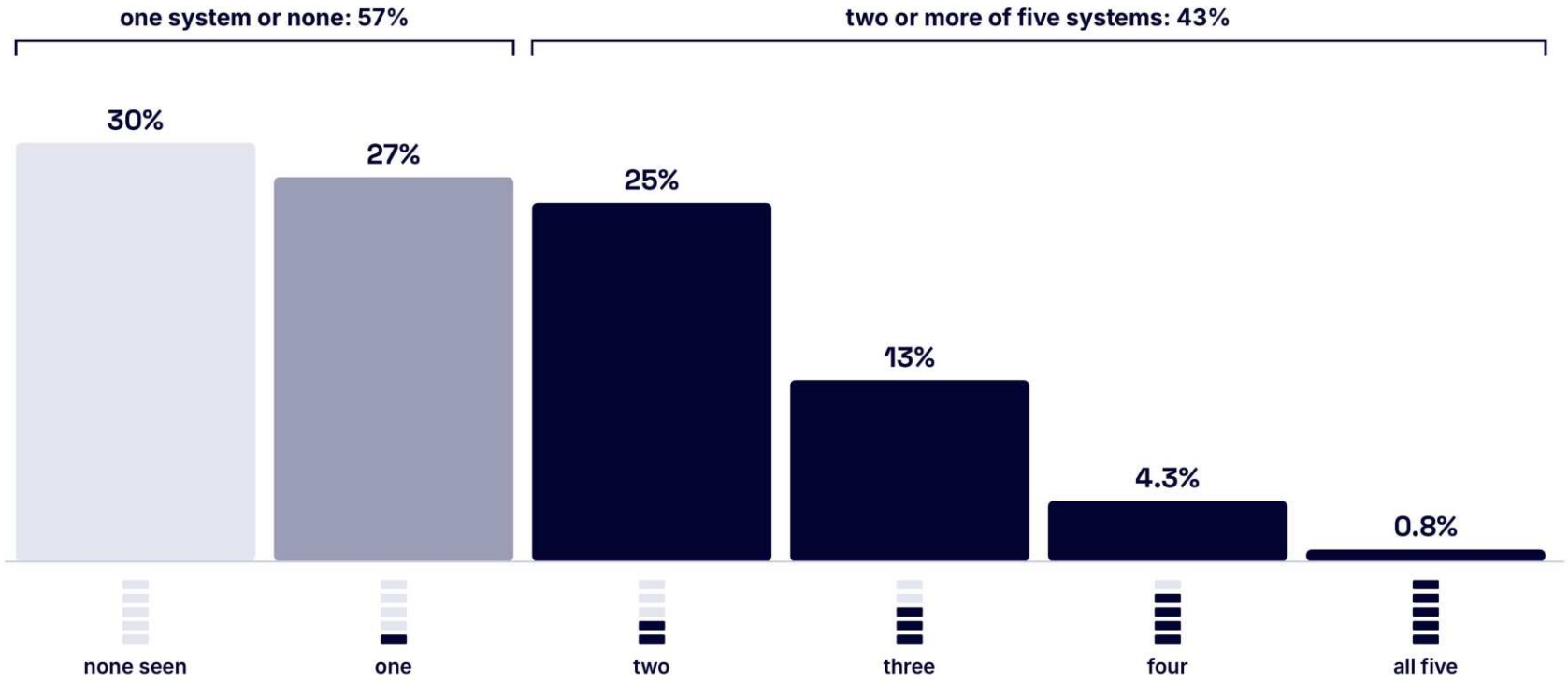


SYSTEMS ON THESE PAGES

- POS
- Online booking
- Online ordering
- Loyalty
- Card and dining rewards

Opportunity: most places use one restaurant tech system or none

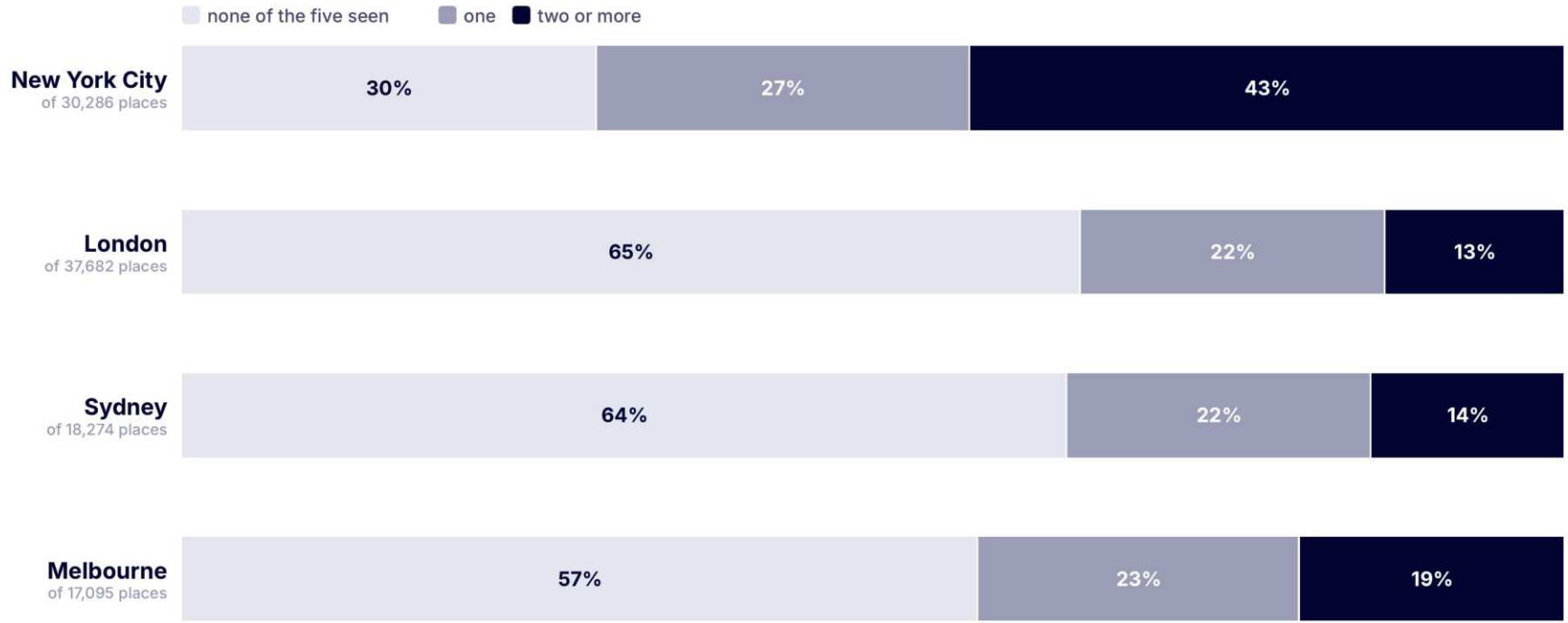
New York City, 30,286 places: how many of the five systems are seen



Source: Dashmote restaurant technology data, Oct 2026.

Most places show one system or none

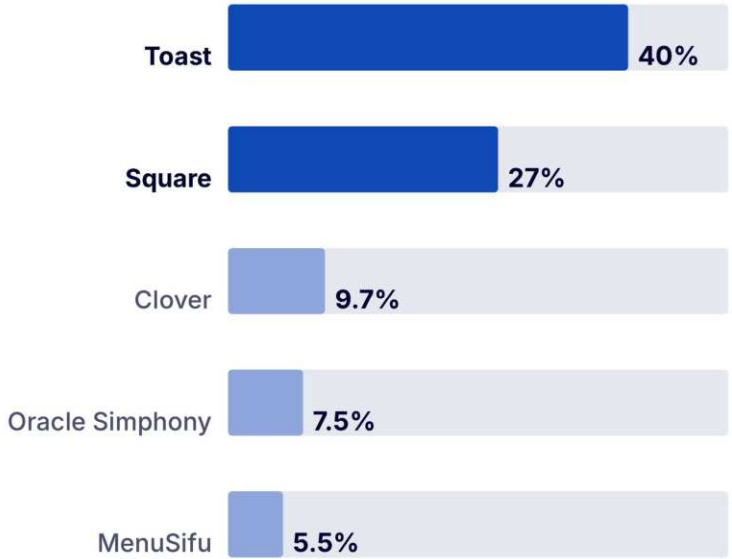
Places by how many of the five systems are seen



Source: Dashmote restaurant technology data, Oct 2026.

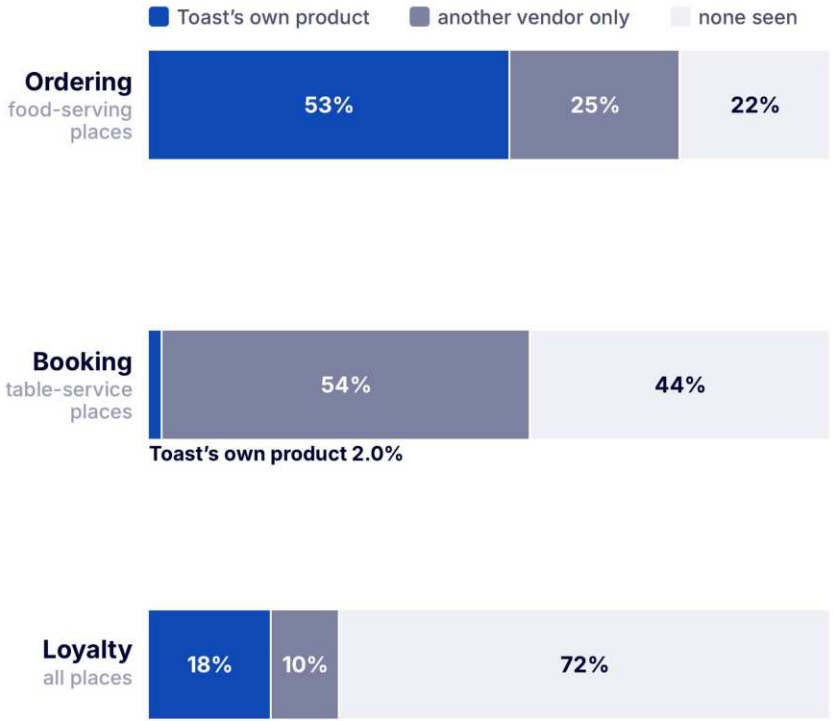
Toast and Square are the POS seen most in New York

POS vendors, share of New York places with a POS seen



Across the US: Baird estimates Clover has 20% of small-restaurant POS card processing, Toast 17% and Square 13% (outside the 250 largest groups). Clover leaves few public traces, so its bar is a floor.

Toast POS places: who supplies each system

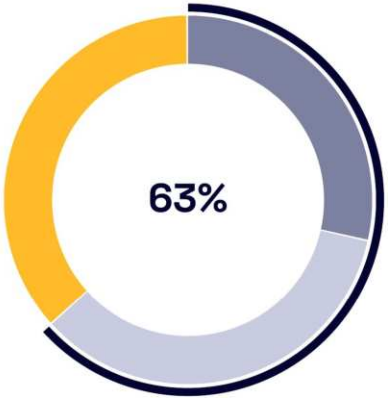


Source: Dashmote restaurant technology data, Oct 2026; Baird via Payments Dive, Jan 2026.

Delivery platforms want to power restaurants' direct ordering too

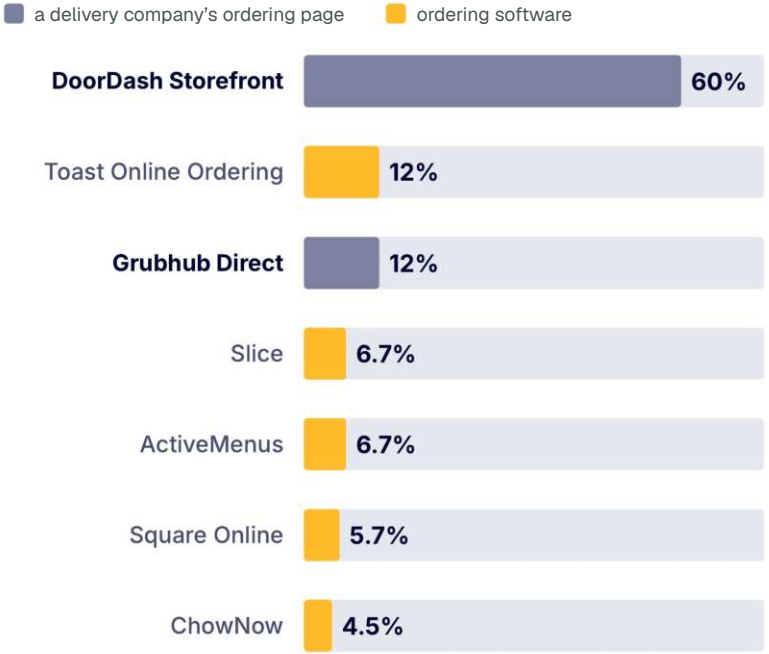
Most New York places with direct ordering show a delivery company's page

Delivery company's page or the restaurant's own options



a delivery company's page only	28.6%
both	34.8%
the restaurant's own site or ordering tool only	36.6%
a delivery company's page in the restaurant's name	**63.4%**
10,163 places	

Direct ordering options on Google's order button, share of places



Of 16,021 New York food-serving places whose Google order button offers at least one direct ordering option; a place can show more than one.

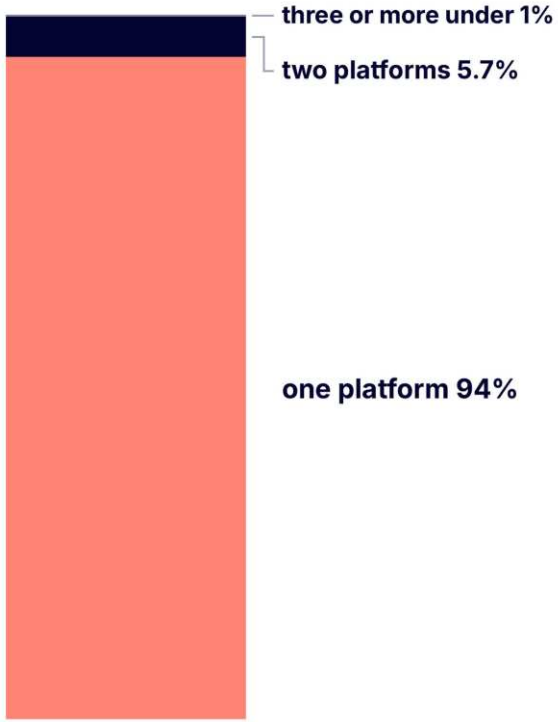
Source: Dashmote restaurant technology data, Oct 2026.

OpenTable leads online booking in the US

Share of US restaurants bookable on the six platforms, by platform



Platforms per bookable restaurant

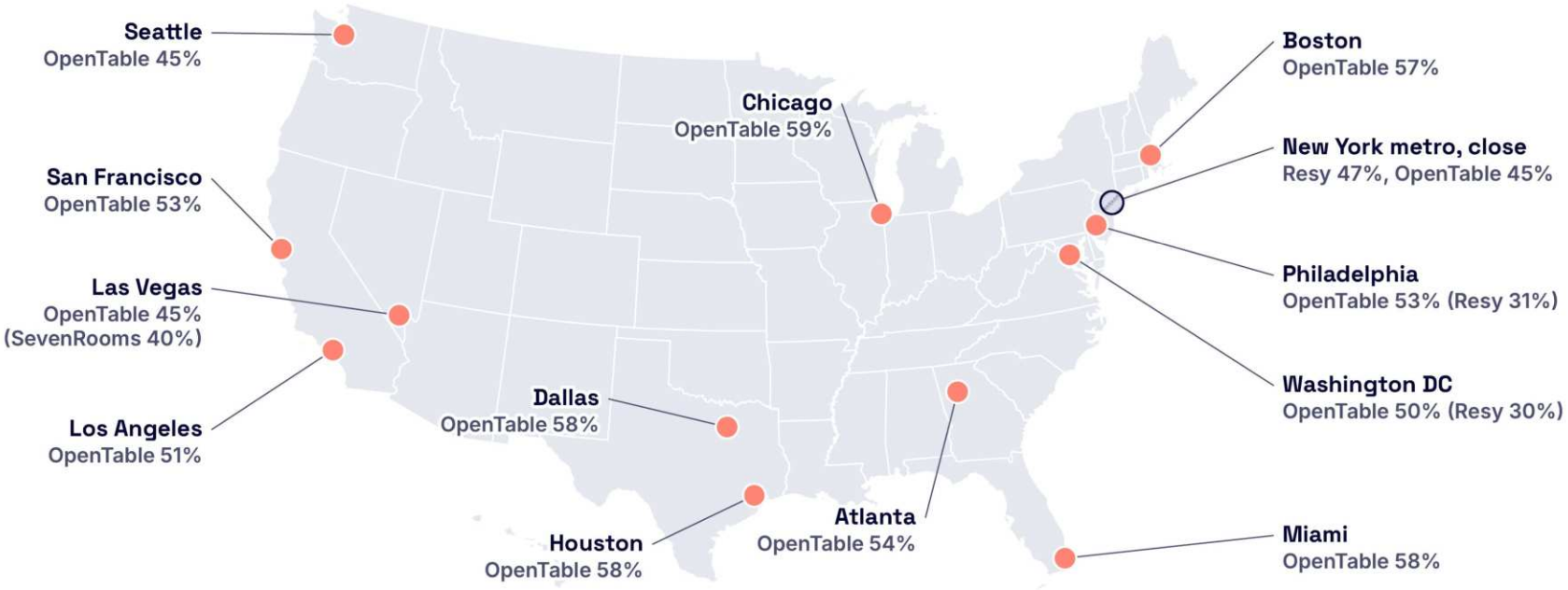


Source: Dashmote restaurant technology data, Oct 2026.

OpenTable leads online booking in all but one US metro area

Share of restaurants bookable on the six platforms, by metro area

OpenTable leads by 5 points or more close: no 5-point lead

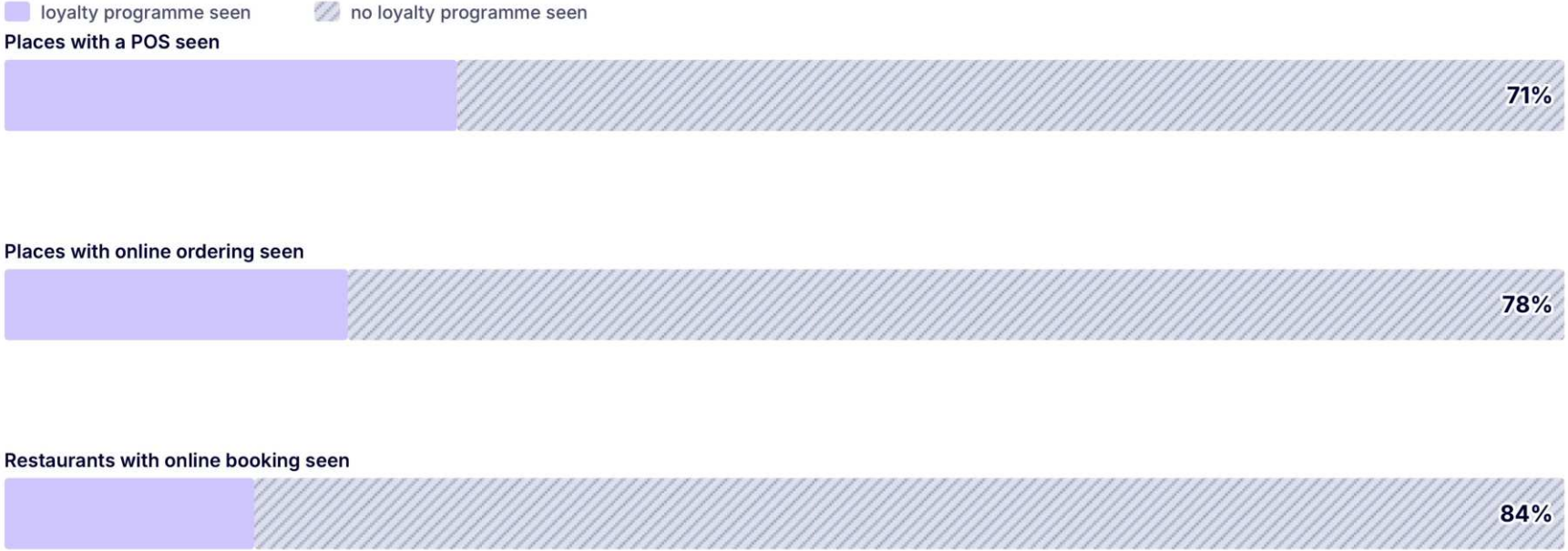


New York City alone: Resy 54% of places with a booking system seen (p. 14).

Source: Dashmote restaurant technology data, Oct 2026.

Most New York POS places show no loyalty programme

New York places with no loyalty programme seen, by system (shares are upper bounds)

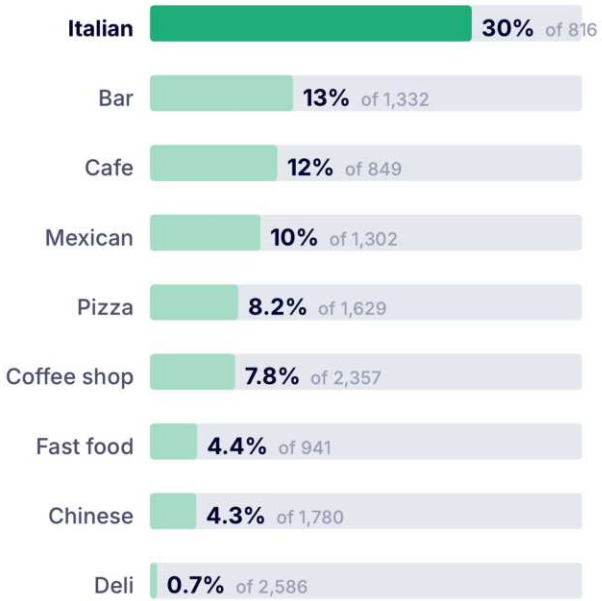


Across the US: 52% of restaurant operators say they have a loyalty or rewards programme, digital or not (operator survey).

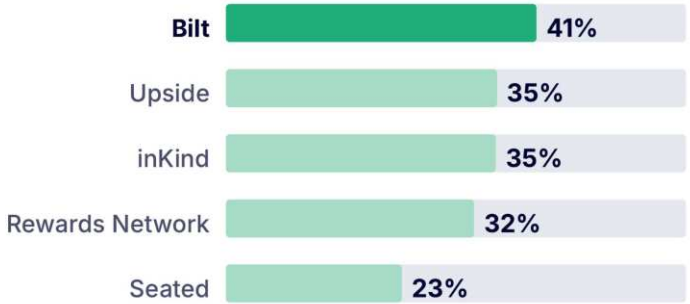
Source: Dashmote restaurant technology data, Oct 2026; National Restaurant Association, State of the Restaurant Industry 2025.

Italian restaurants show card rewards most in New York

Places with card and dining rewards seen, largest venue types



Share of the 3,325 places with rewards seen, by programme



Programmes share restaurants.

"Even the best restaurants have to pivot around a rainy Monday."

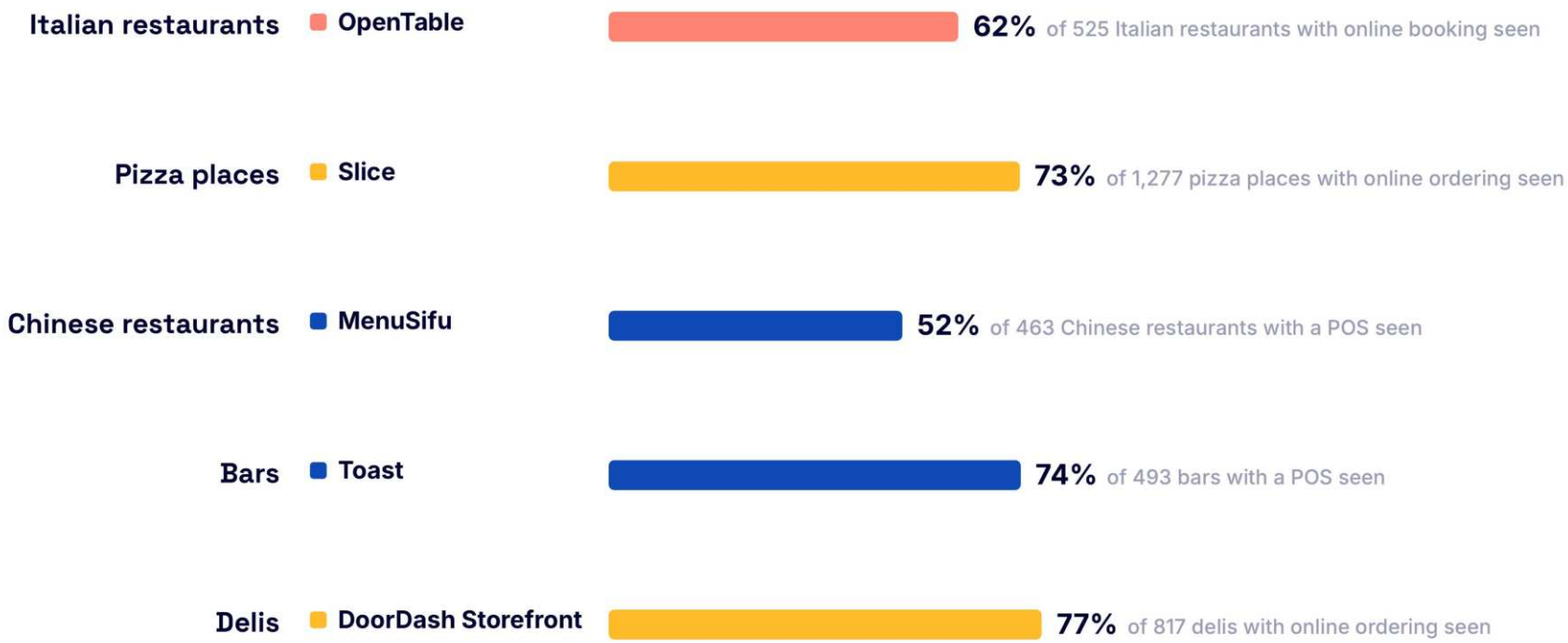
Sam Bakhshandehpour, President of Merchants, Bilt (Observer, Oct 2026)

Rewards Network says its dining network has 20,000 restaurants and 25 million+ members (company figures).

Source: Dashmote restaurant technology data, Oct 2026; Observer, Oct 2026; Rewards Network, Sep 2026; Prosus, Nov 2026; Bilt Rewards, Oct 2022. Prosus has invested in Bilt.

Each New York venue type has its own top vendor

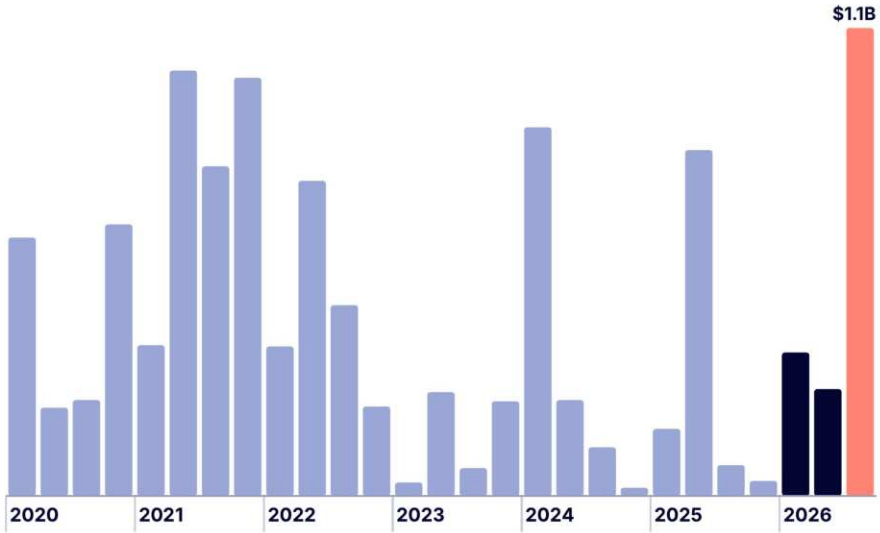
The leading vendor in each venue type



Source: Dashmote restaurant technology data, Oct 2026.

Five rounds make up most US funding this year

United States: VC investment by quarter, restaurants and shops (dark: Q1 and Q2 2026; orange: Q3 2026)



US companies raised $1.7B in 2026 to Q3, against $1.1B in all of 2025 and a peak of $3.2B in 2021. Of the $1.7B, about $1.4B went to restaurant-focused segments.

The five biggest US rounds, 2026 to Q3

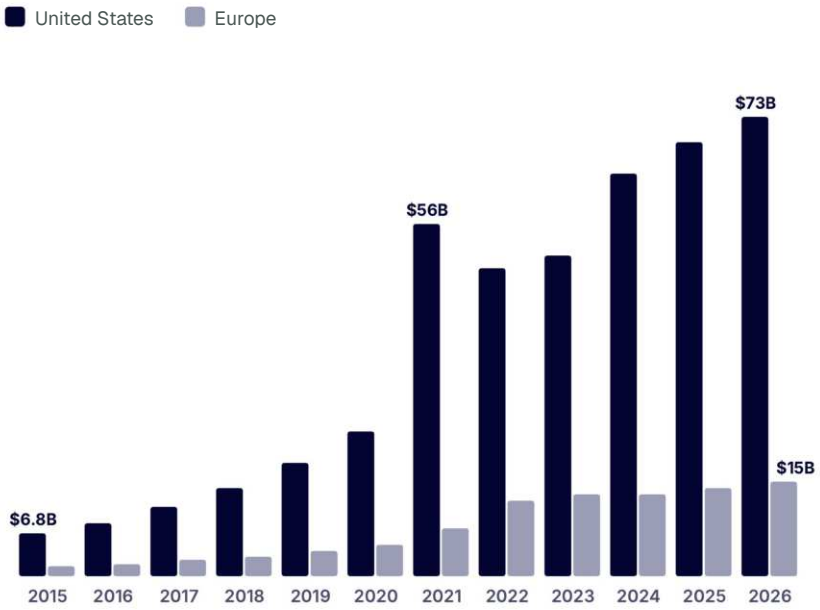


Wonder runs restaurants and owns Grubhub.

Source: Dealroom.co, Q3 2026.

Most restaurant tech unicorns are in the US

Combined value of VC-backed restaurant and shop technology companies, by year, on one scale (2026: latest valuations)



The 14 restaurant technology companies valued at $1B or more, listed and acquired included (Dashmote count from Dealroom.co data)



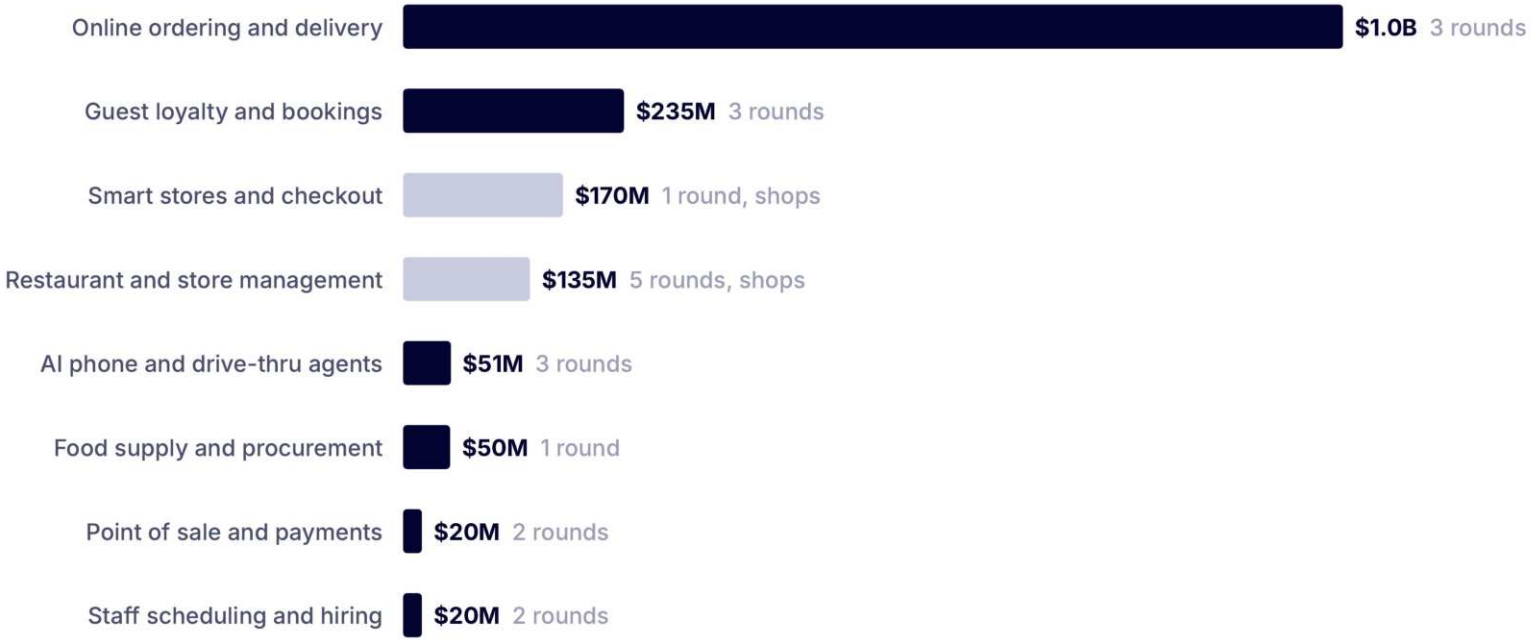
Wonder: pre-money value of its Jul 2026 round.

Source: Dealroom.co, Q3 2026; Thoma Bravo, Sep 2025; Wonder, Jul 2026.

prosus Ventures x DASHMOTE | FUNDING DATA BY dealroom.co

Online ordering raised the most US funding this year

VC investment by segment, 2026 to Q3 (grey: shops)



Restaurant-focused segments: **about $1.4B**. Online ordering and delivery is mostly Wonder, which runs restaurants and owns Grubhub.

Source: Dealroom.co, Q3 2026.

Suppliers and tech firms bought US restaurant tech companies

Restaurant technology companies bought in 2026 to Q3, by kind of buyer (all US buyers, prices not disclosed)

COMPANY BOUGHT	BOUGHT BY	WHEN
86 Repairs	**Parts Town** Parts supplier	Jun 2026
GiftAMeal	**Swipe Savvy** Payments company	Apr 2026
OfOne	**Deepgram** Voice AI company	Jan 2026

Fast growers: the 94 restaurant technology companies among Dealroom.co's 100 fastest-growing US restaurant and shop technology companies by Signal

■ among the ten with the highest Dealroom Signal (the tenth is a shop company) ▢ also in this report's restaurant data

Guest loyalty and bookings	20	inKind, Seated	+18 more
Restaurant and store management	16	Loop AI, Science On Call	+14 more
Kitchen robots and vending	15	Piestro, Creator	+13 more
Point of sale and payments	12	Sunday, Scotch, Toast, MenuSifu	+8 more
Online ordering and delivery	12	Owner, Wonder, Slice, ChowNow	+8 more
Food supply and procurement	8	Pepper, Cut&Dry	+6 more
AI phone and drive-thru agents	7	Slang	+6 more
Staff scheduling and hiring	4	Harri, ShiftOne	+2 more

Source: Dealroom.co, Q3 and Oct 2026.

Europe

TRENDS
In six European cities, 85% of restaurants at €60 and up per person are listed on a booking platform.

WHAT IS INTERESTING
In Berlin, 75% of restaurants bookable online use their own booking software.

WHO WINS WHERE
The booking leader changes from country to country: no platform leads in more than three of the 11 countries.

WHICH VENUES
French restaurants are bookable online most often, burgers and fast food least.



SYSTEMS ON THESE PAGES · POS · Online booking · Online ordering



Sebastiaan Vaessen
Head of Europe, Prosus Ventures

prosus Ventures

“In Europe, the booking leader changes at almost every border, and most restaurants still buy their software one tool at a time. That is why we find Europe exciting. The companies that connect those tools, and make restaurants visible to AI agents, can become the category leaders of the next decade.”

AI assistants and platform ads reach Europe’s diners

Diners plan with AI assistants

UK consumers who use AI tools to plan a visit to a pub, bar or restaurant



London consumers, same question



German holidaymakers who have let AI suggest restaurants



Google AI Mode finds restaurant tables across the UK on eight booking platforms, including TheFork and OpenTable; the diner books on the partner site.

Just Eat Takeaway.com’s AI voice assistant runs in eight European markets. The company says users find what they want about 40% faster than by text.



Platform ads are a growing business in Europe

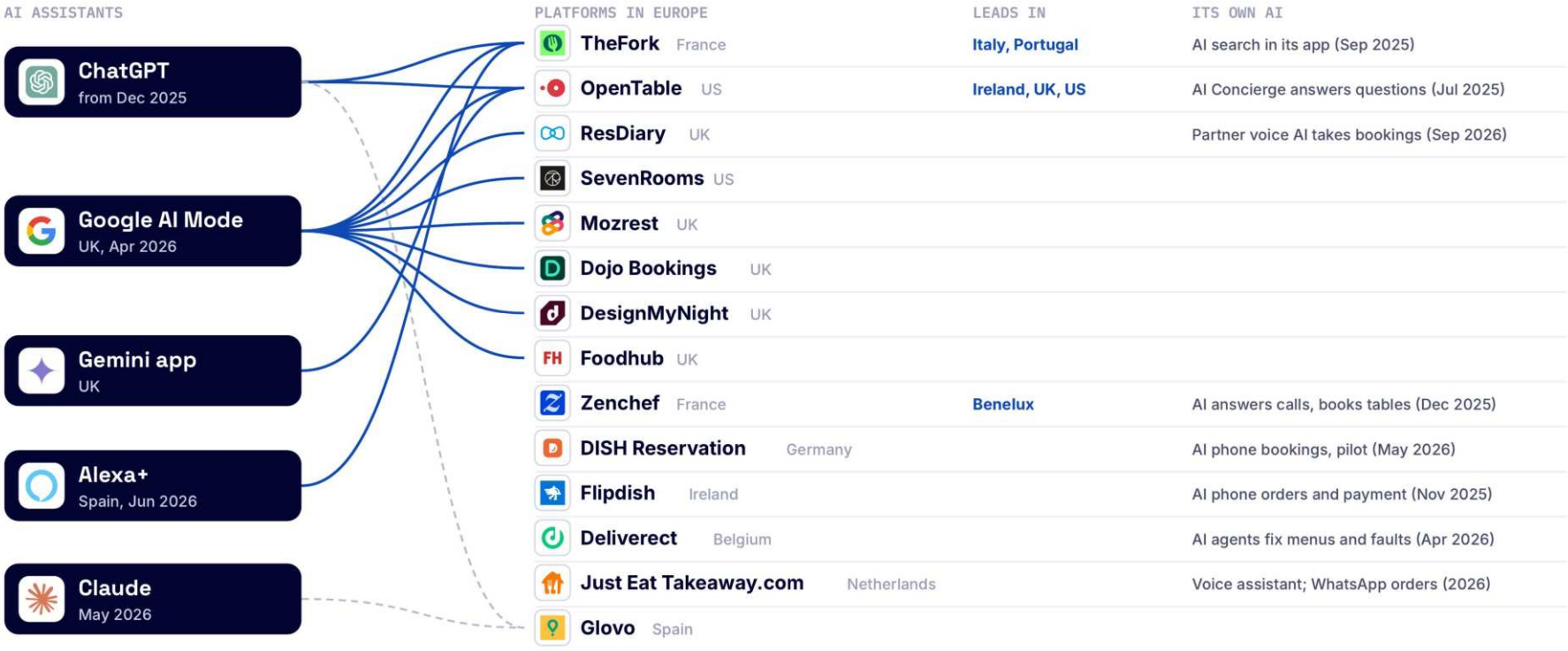
Retail media in Europe grew 16.7% to €13.3B in 2025, passing 10% of all digital ad spend.

Just Eat Takeaway.com’s ad platform, JETads, runs in all 14 of its European markets and reaches 59 million active consumers.

Source: Zonal and NIQ, Oct 2026; Bitkom, Aug 2026; Google, Apr 2026; Just Eat Takeaway.com, Aug and Nov 2026; IAB Europe, Jul 2026. Just Eat Takeaway.com is a Prosus company (acquired Oct 2025).

AI assistants reach Europe's restaurants through a few platforms

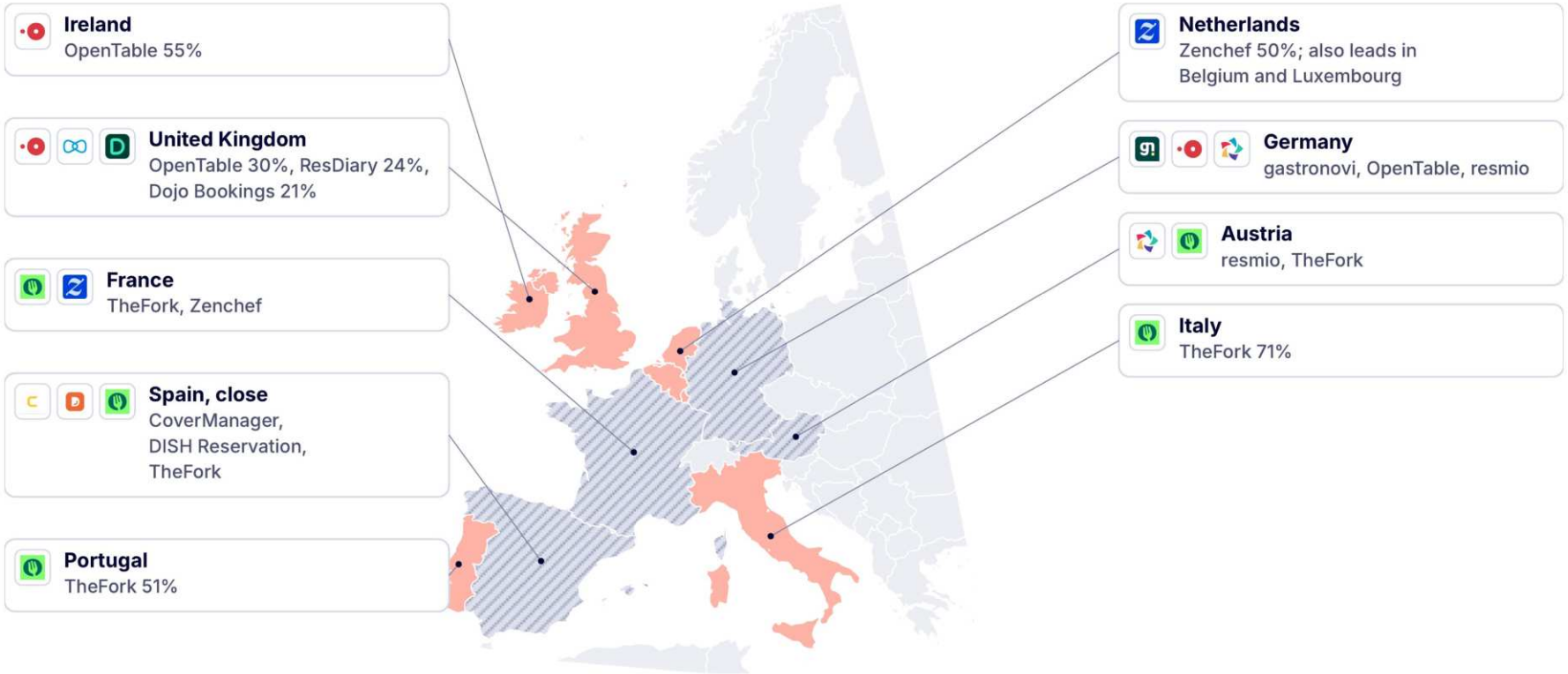
■ takes the booking or order through the assistant ■ product search only Official links only; an assistant that browses the web may also book or order on a platform's own site.



Source: company announcements and help centres, Jul 2025 to Oct 2026; Forbes España, Dec 2025; Prosus, Jul 2026. Blank: none found by Nov 2026. Just Eat Takeaway.com is a Prosus company (acquired Oct 2025). Glovo is part of Delivery Hero, in which Prosus holds a minority stake that it has agreed to sell to Uber.

The booking leader changes from country to country in Europe

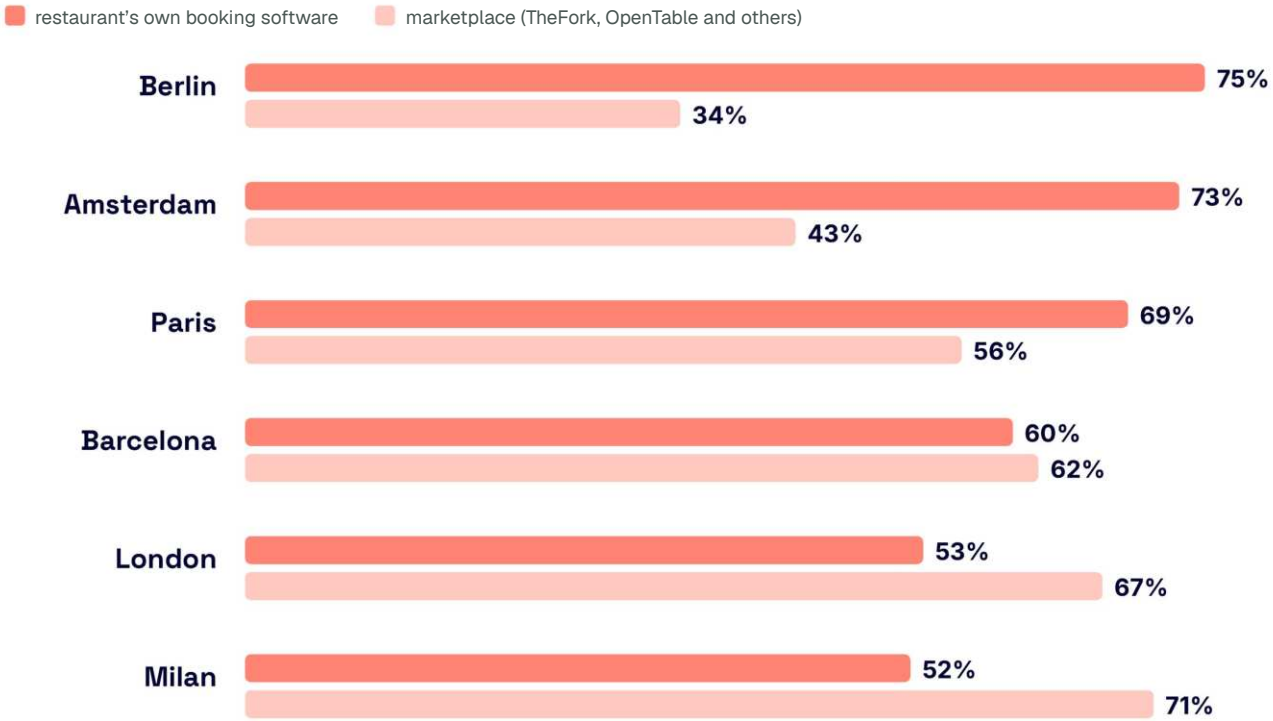
leads by 5 points or more · no single leader named · Shares of each country's restaurants bookable online, not of bookings



Source: Dashmote restaurant technology data, Oct 2026.

Berlin restaurants rely least on booking marketplaces

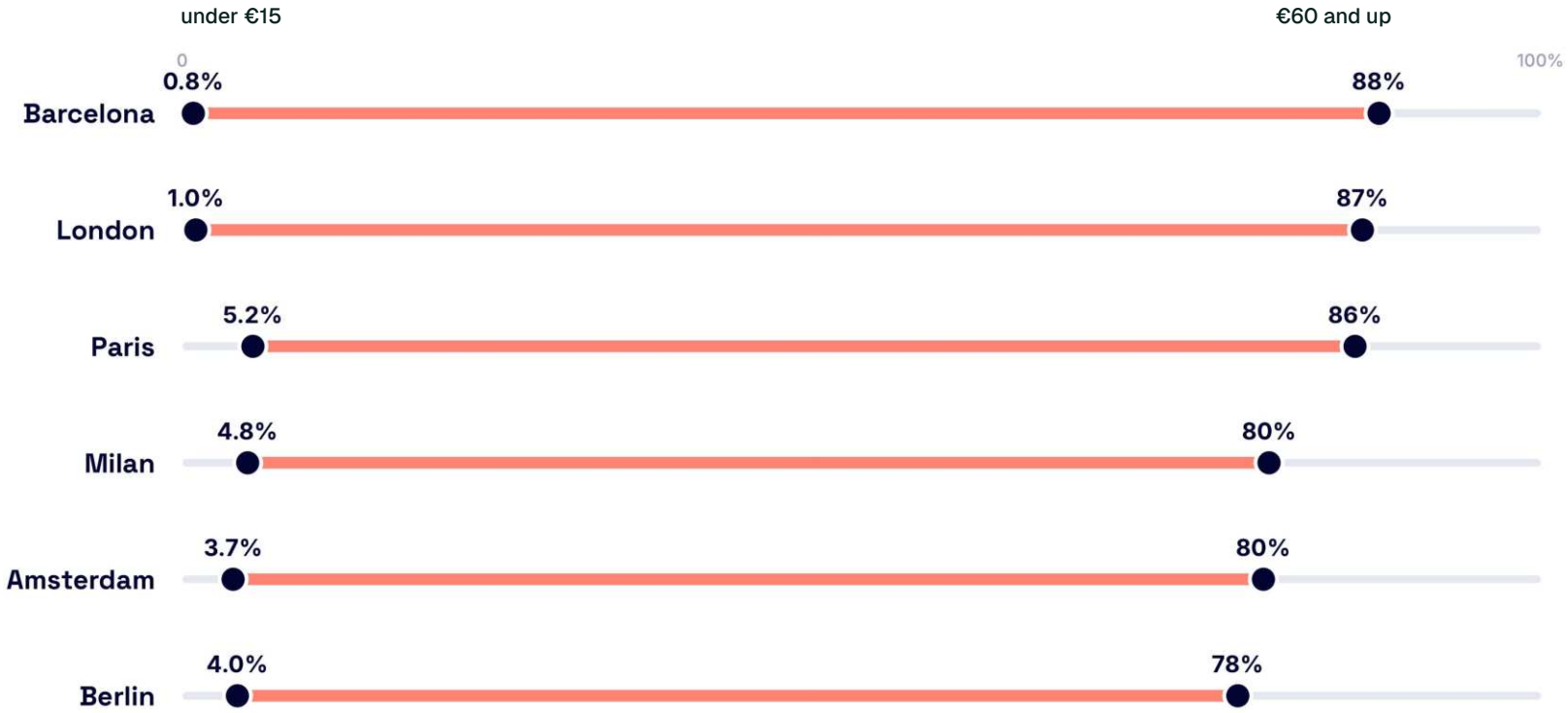
Share of restaurants bookable online, by booking channel (a restaurant can use both)



Source: Dashmote restaurant technology data, Oct 2026.

Pricier restaurants are more likely to offer online booking

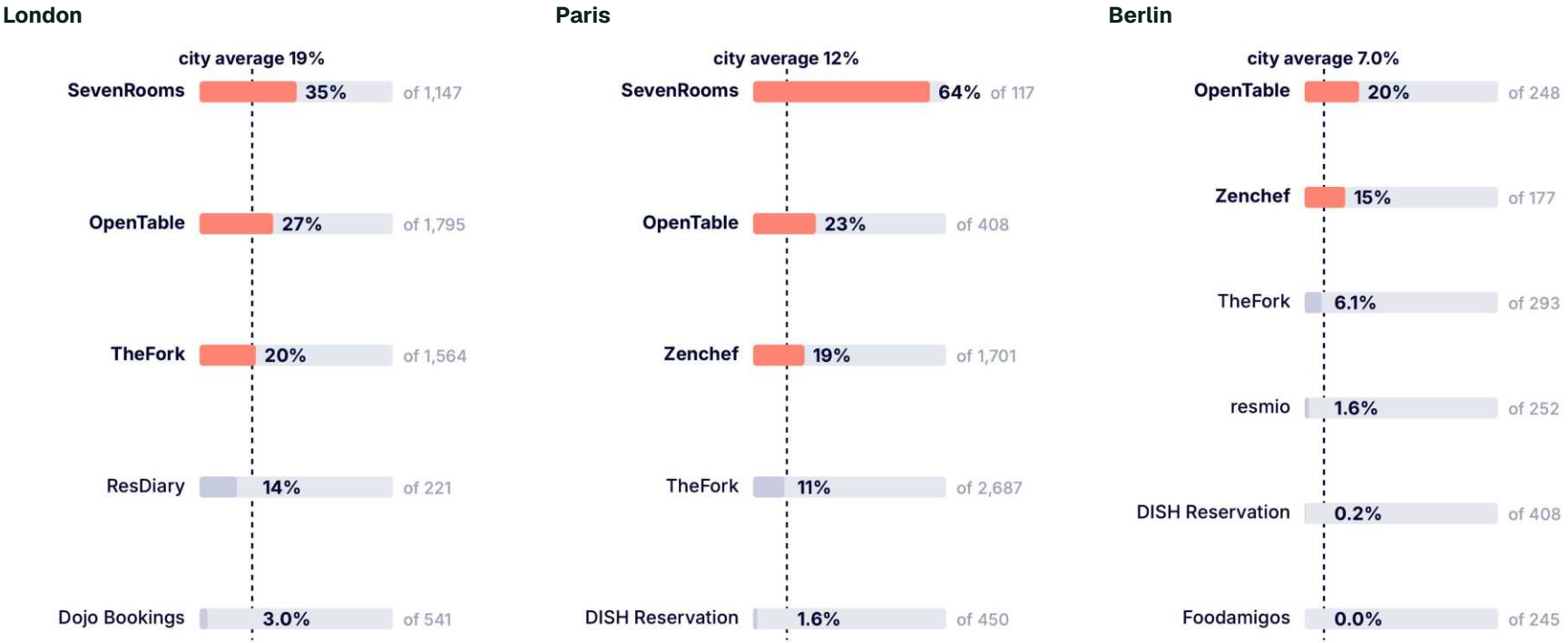
Share of restaurants listed on a booking platform, by price per person



Source: Dashmote restaurant technology data, Oct 2026.

SevenRooms skews most to Europe's priciest restaurants

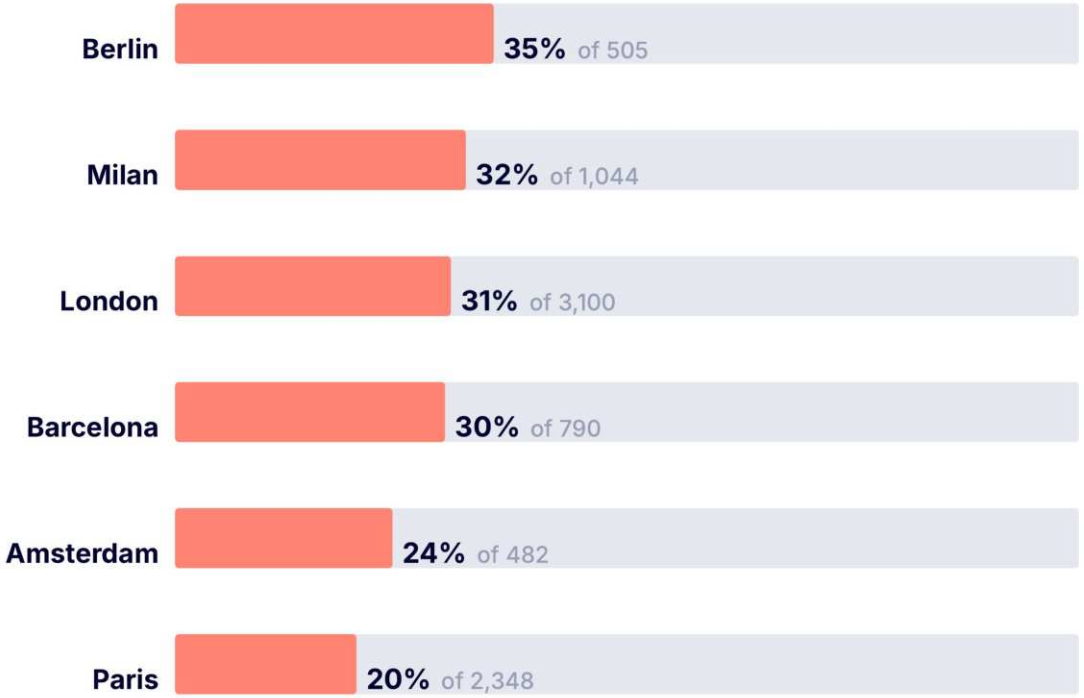
Share of each platform's restaurants at €60 and up per person



Source: Dashmote restaurant technology data, Oct 2026.

Many mid-priced and upscale restaurants show no booking tool

Up to this share of restaurants at €30 and up per person show no booking tool

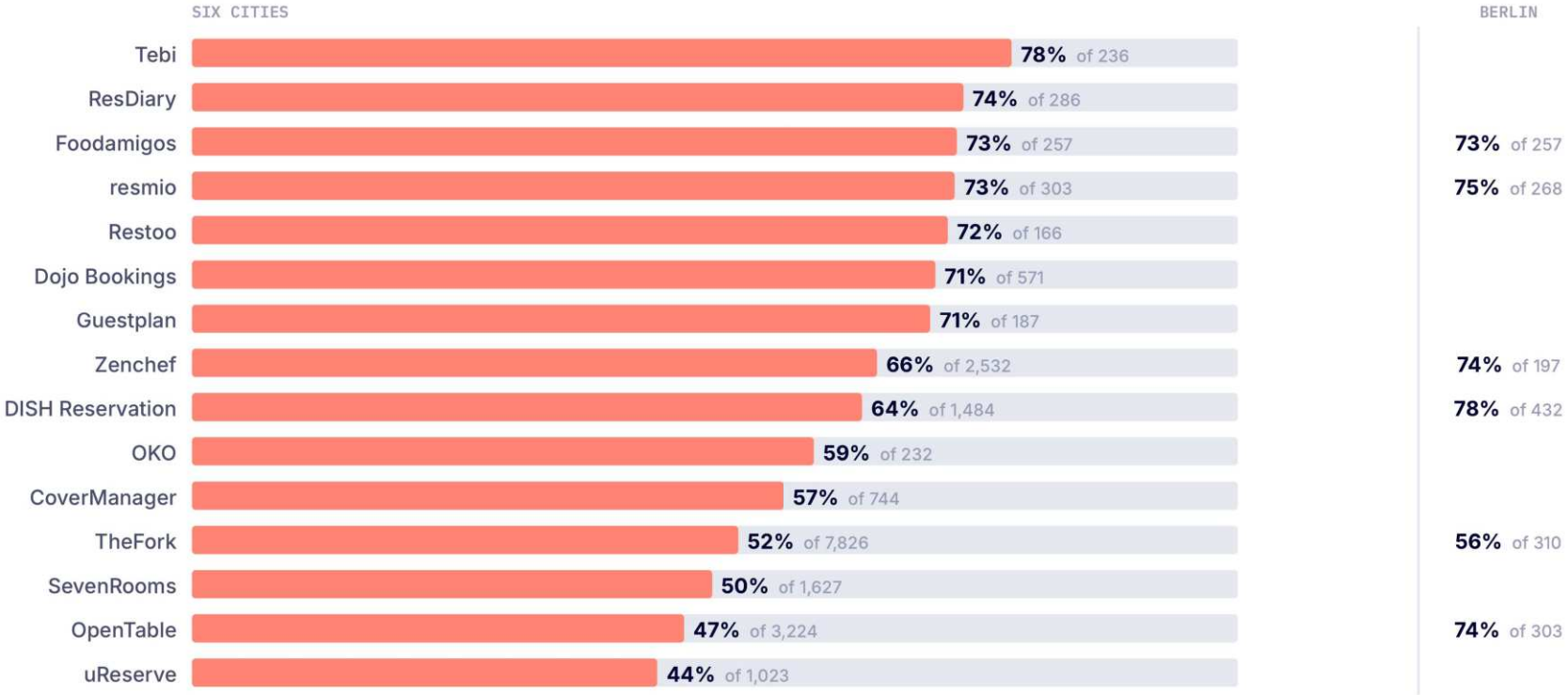




Source: Dashmote restaurant technology data, Oct 2026.

On most platforms, most restaurants show no other booking tool

Up to this share of each platform's restaurants show no other booking tool



Berlin: shown for the six platforms measured there.

Source: Dashmote restaurant technology data, Oct 2026.

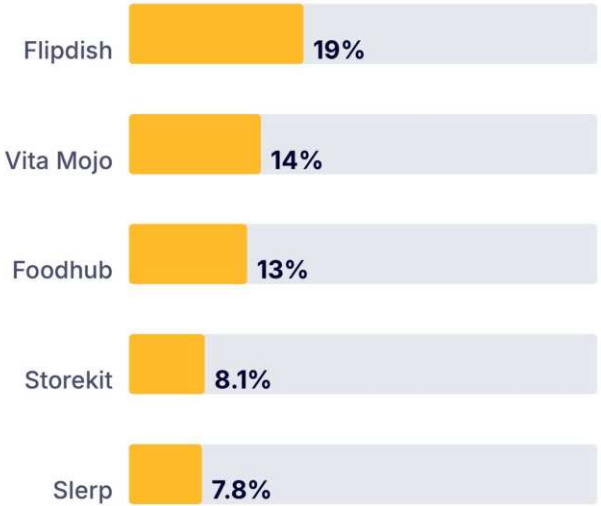
London has twice as many direct ordering vendors as Amsterdam

ordering software a delivery company's ordering page

London

41 online ordering vendors seen

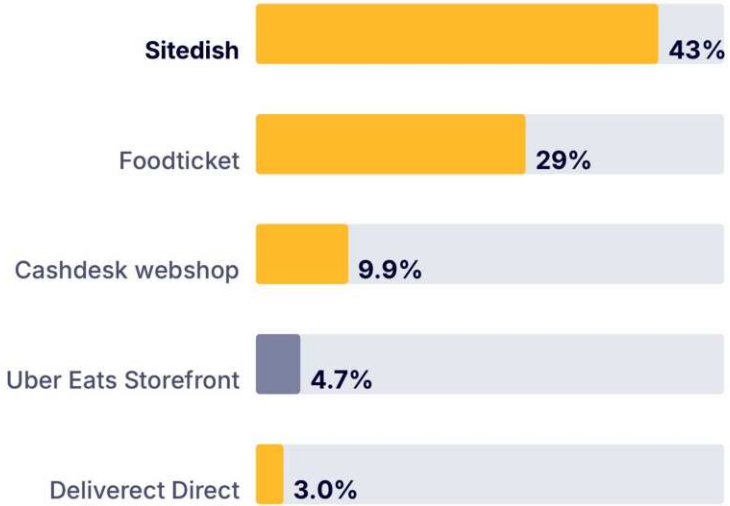
Vendor shares of the 3,198 London places with online ordering seen



Amsterdam

19 online ordering vendors seen

Vendor shares of the 507 Amsterdam places with online ordering seen



Google's order button in London and Amsterdam is on p. 20.

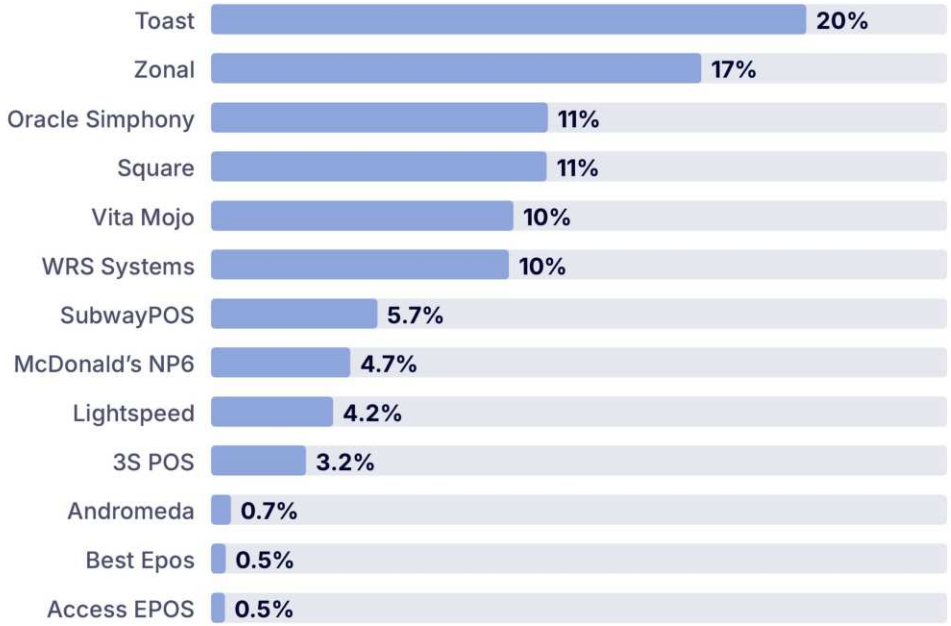
Source: Dashmote restaurant technology data, Oct 2026.

No POS vendor is clearly ahead in London



POS vendors, share of London places with a POS seen

Of 4,455 places with a POS seen (12% of open eating and drinking places)

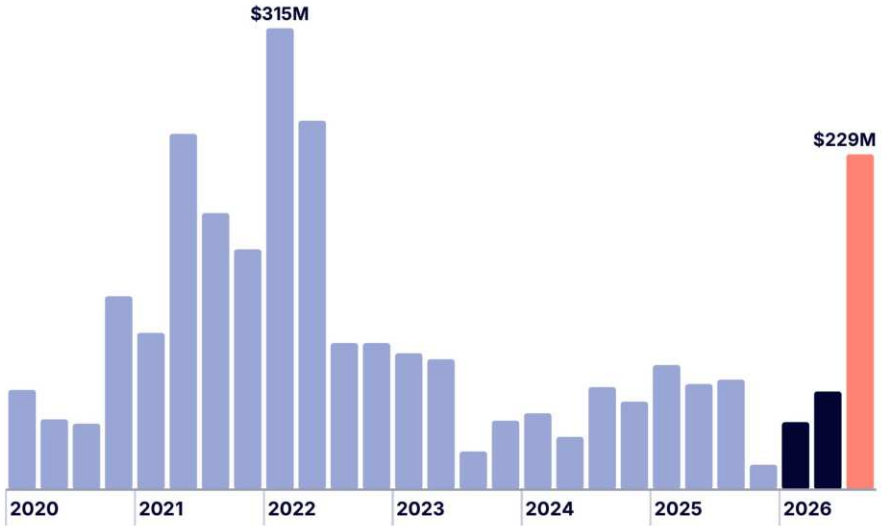


No vendor is 5 points clear of the next. Six of the ten largest are seen almost only through chains, counted at every branch.

Source: Dashmote restaurant technology data, Oct 2026.

Funding for European restaurant tech is trending up

Europe: VC investment by quarter, restaurants and shops (dark: Q1 and Q2 2026; orange: Q3 2026)



European companies raised $343M in 2026 to Q3 (US: $1.7B), about $280M of it restaurant-focused (US: about $1.4B). All of 2025: $249M; peak: $767M in 2022.

By company headquarters, 2026 to Q3



The three biggest rounds, 2026 to Q3



Source: Dealroom.co, Q3 2026.

One Skello round was most of Europe's funding this year

All VC investment in European restaurant and shop technology, 2026 to Q3: $343M



skello

The one staff scheduling round: France, growth equity, Jul 2026

Restaurant-focused segments: **about $280M**

The rest of Europe's funding, by segment (grey: shops)



Source: Dealroom.co, Q3 2026.

Restaurant tech in Europe is consolidating; a card issuer now owns TheFork

Purchases of restaurant technology companies in Dealroom.co's Europe view, 2026 to Q3

COMPANY BOUGHT	BOUGHT BY	WHEN	PRICE
TheFork · France	American Express · card issuer	Jun 2026, completed Nov 2026	$700M, subject to adjustments
KAIKAKU · United Kingdom	REEF Technology · kitchen operator	Jul 2026	not disclosed
Kitchen Robotics · US and Israel	Circus Group · food robotics company	Apr 2026	low six figures, all cash
Kurve Kiosks · United Kingdom	ClearCourse · software group	Apr 2026	not disclosed
inoqo · Austria	Mondra · food data software	Feb 2026	not disclosed

Source: Dealroom.co, Q3 2026; TheFork: Tripadvisor, Nov 2026; Kitchen Robotics: Circus SE, Apr 2026.

Europe's fastest-growing players by segment

The 76 restaurant technology companies among Dealroom.co's 100 fastest-growing European restaurant and shop technology companies by Signal, by main product (number of companies)

■ among the ten with the highest Dealroom Signal (the tenth is a shop company) ▢ also in this report's restaurant data

Online ordering and delivery 19

Flipdish · Slyce.io · Kanpla · Karma · HungryPanda · StiQ · Huuva · Menumal · Mr Noow · Favrit · Delicity · Vita Mojo · Deliverect · Fascano · Too Good To Go · Munchi · ORDA · Wibl · Slerp

Restaurant and store management 18

Nory · **Tebi** · **haddock** · Iiko · Tenzo · FoodOp · Winnow · KITRO · Edify Systems · Fresto.io · Badakan · Peckish · allO · Flowtify · Satis.AI · Dishboard · Zest HACCP · Alpa

Guest loyalty and bookings 15

TVM Media · Leeroy · Businesstable · Superb · FineDine · Velada · Tablevibe.co · City Digital Group · Gastroclub · Foodguide App · e-table.gr · EmenuNow · resmio · Malou · Ialoc

Staff scheduling and hiring · AI phone and drive-thru agents 7

Skello · **All Gravy** · Extracadabra · Vox AI · One Touch Systems · Combo · Brigad

Point of sale and payments 7

Choice · MissTipsi · POSbistro · Last.app · Innovorder · FOODit · Poster

Food supply and procurement 5

Saltz App · Orderlion · Choco · Muffin · Mondra

Kitchen robots and vending 5

Unity Coffee · Circus · EBar Initiatives Ltd · Macco Robotics · Natural Machines

Source: Dealroom.co, Oct 2026.

prosus Ventures x DASHMOTE | FUNDING DATA BY dealroom.co

India

TRENDS

In the Delhi NCR districts we measured, 20% of table-service restaurants have a booking-app link on their Google listing.

WHAT IS INTERESTING

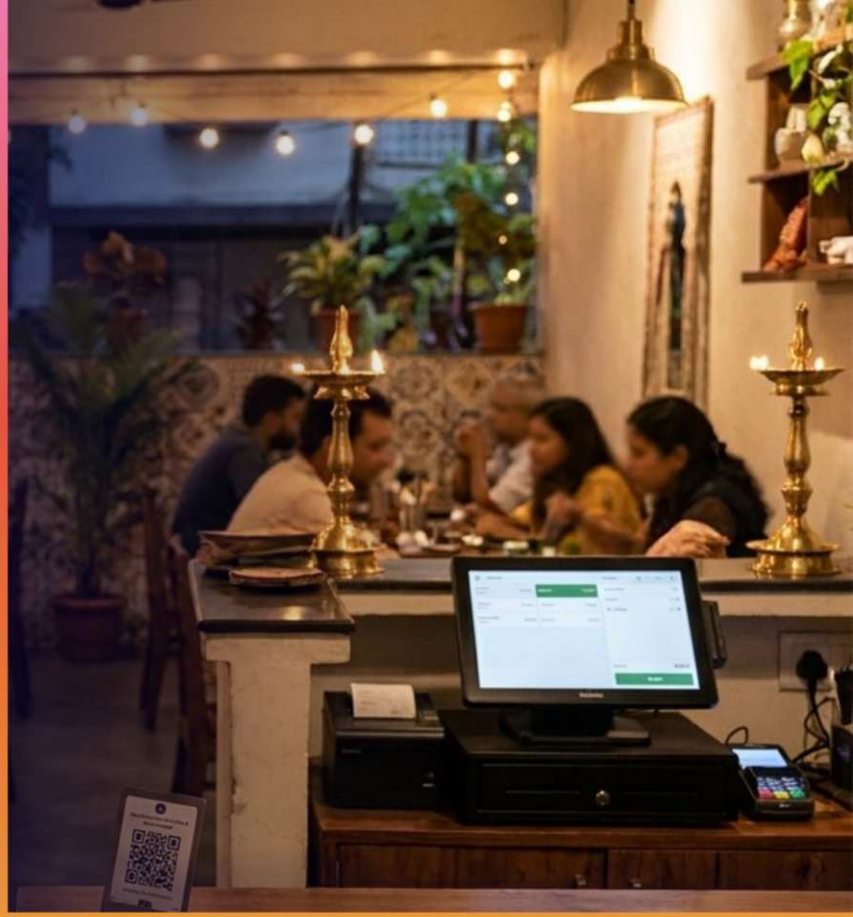
52% of them link to more than one app.

WHO WINS WHERE

98% of these restaurants in Delhi NCR link to Swiggy Dineout or District.

WHICH VENUES

Bars show dining rewards more often than food-serving places.



Prosus holds about 21% of Swiggy.

SYSTEMS ON THESE PAGES

- Online booking
- Card and dining rewards

India pays by phone and talks to businesses in chat

Small merchants surveyed who accept UPI



Online adults who message a business every week



Internet users who use AI features such as voice search and chatbots



UPI carried about 49% of the world's real-time payment volume in 2024.

UPI processed 25.47 billion payments in Oct 2026.



AI assistants reach restaurants

India had 100 million weekly ChatGPT users in Feb 2026, when it was ChatGPT's second-largest market; OpenAI now calls India its largest (Nov 2026).

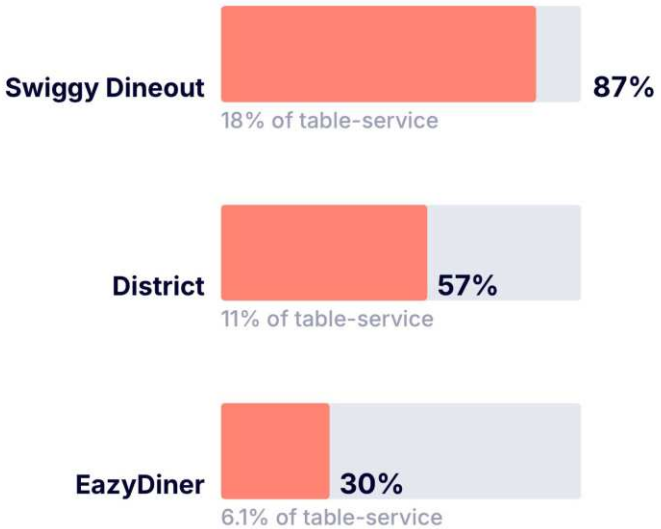
Google AI Mode in India finds open restaurant tables and links to the partner's page to book. EazyDiner and the two largest delivery apps were the first partners (Apr 2026).

Source: Department of Financial Services, Feb 2026; Meta citing Kantar, May 2026; IAMAI via Business Today, Jan 2026; Press Information Bureau, Aug 2026; TechCrunch, Feb 2026; Inc42, Nov 2026; TelecomLive, Apr 2026; NPCI via Entrepreneur India, Nov 2026.

Almost every listed Indian restaurant links to Swiggy Dineout or District

Delhi NCR

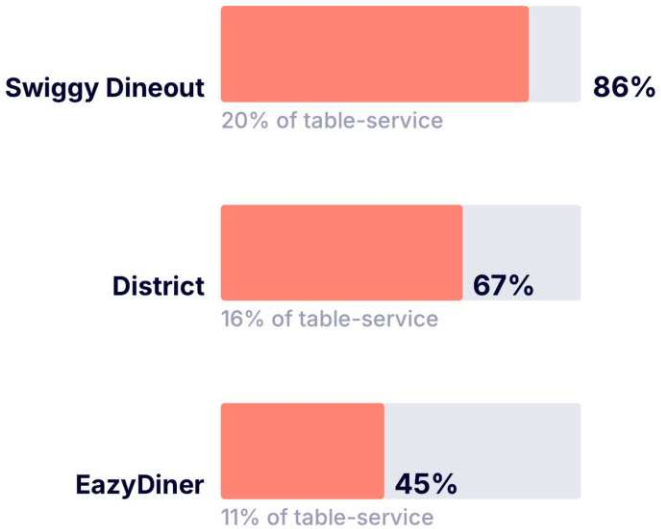
Booking link on Google listing: **20%** of 22,151 table-service restaurants



98% of the 4,443 listed restaurants link to Swiggy Dineout or District.

Mumbai

Booking link on Google listing: **24%** of 8,480 table-service restaurants



97% of the 2,003 listed restaurants link to Swiggy Dineout or District.

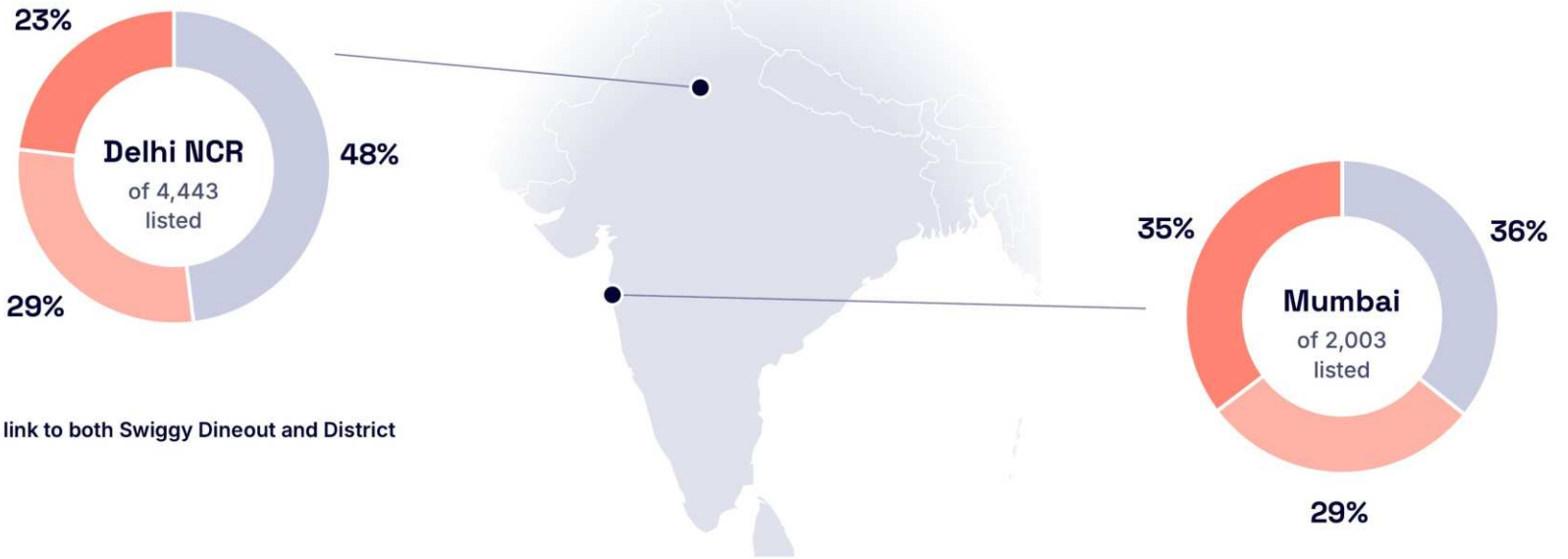
Bars: share of restaurants with a booking link; grey text: share of all table-service restaurants.

Source: Dashmote restaurant technology data, Oct 2026. Prosus holds about 21% of Swiggy.

Many Indian restaurants link to more than one booking app

Booking apps per listed restaurant

exactly one app · two · three or more



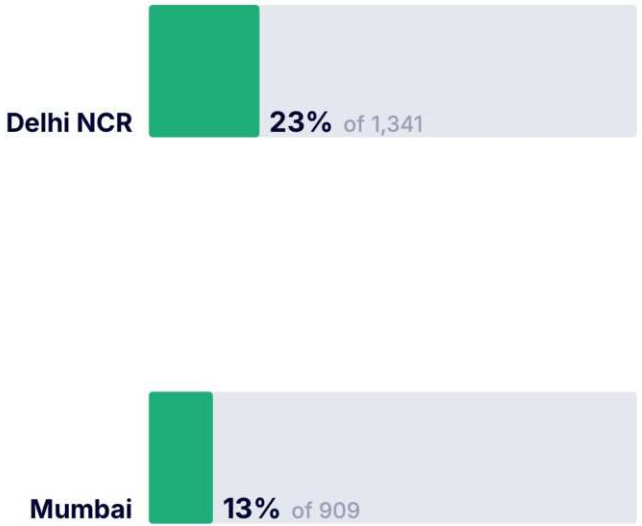
Source: Dashmote restaurant technology data, Oct 2026. Prosus holds about 21% of Swiggy.

Stand-alone dining rewards are rare in India

Card and dining rewards seen: bars against food-serving places



EazyDiner restaurants also in EazyDiner Prime



Counts EazyDiner Prime and SBI Card dining venues, not app-wide card offers.

Source: Dashmote restaurant technology data, Oct 2026.

Brazil

TRENDS
In São Paulo, 16% of food venues show an ordering vendor, far more than show a booking tool.

WHAT IS INTERESTING
São Paulo has 50 competing ordering vendors.

WHO WINS WHERE
Anota AI, a WhatsApp ordering tool, is on 33% of São Paulo venues with a named ordering vendor.

WHICH VENUES
In São Paulo, 14% of chain venues show an ordering link on their Google listing with no vendor named.



iFood, a Prosus company, invested in Anota AI in 2022 and owns Get In.

SYSTEMS ON THESE PAGES · Online booking · Online ordering

Most Brazilian smartphone users buy through WhatsApp

WhatsApp in Brazil

Brazilian smartphones with WhatsApp installed



Smartphone users who buy products or services through WhatsApp



Restaurants that automate their WhatsApp service (Abrasel owner survey)



iFood customers can order with one click and pay by Pix without leaving WhatsApp (Jul 2026).

Meta’s Business AI for WhatsApp reached Brazilian businesses in Feb 2026.

Ordering vendors on restaurant websites: share of venues that use one of the three largest

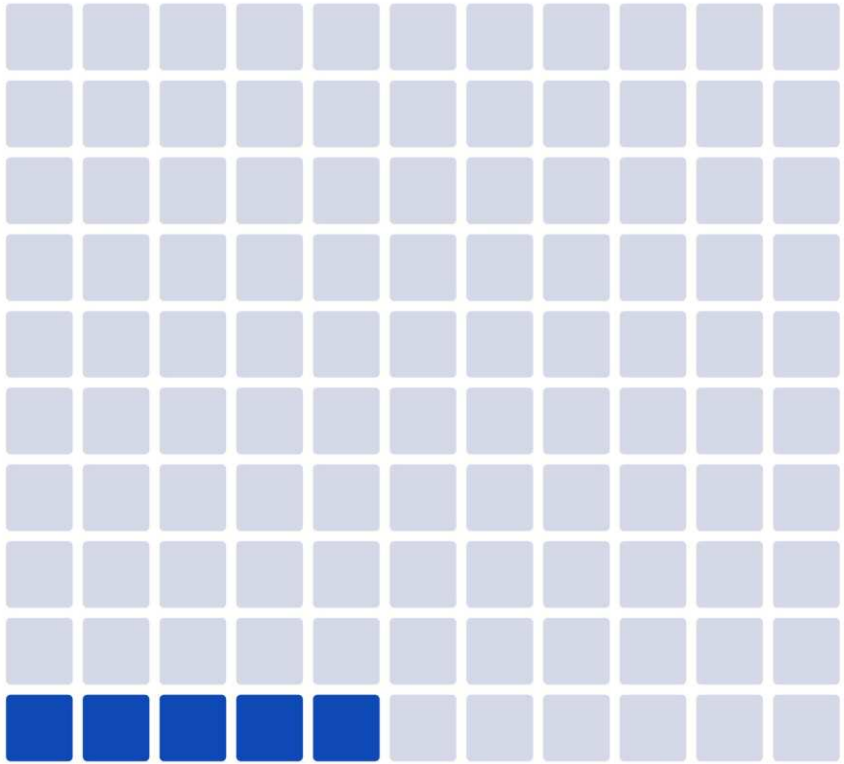




Source: Dashmote restaurant technology data, Oct 2026; Mobile Time and Opinion Box, Apr 2025 and (via Canaltech) Jun 2026; Abrasel, Mar 2025; iFood via Canaltech, Jul 2026; Forbes Brasil, Feb 2026. iFood is a Prosus company.

Brazil's restaurant software market is still wide open

Brazil's restaurants, and how many the largest software players serve



1.1 million
restaurants
in Brazil

1 square =
10,000 restaurants

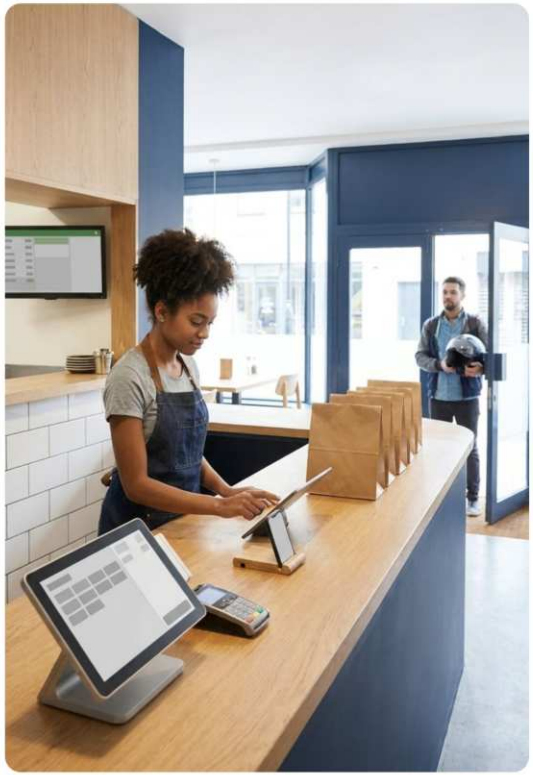
Abrasel projects bar and restaurant revenue of R$540B for 2026.

about 50,000
served by Totvs-Linx and Colibri

(Takeat founder's estimate)

Source: Brazil Journal, Feb 2026; Abrasel, Sep 2026.

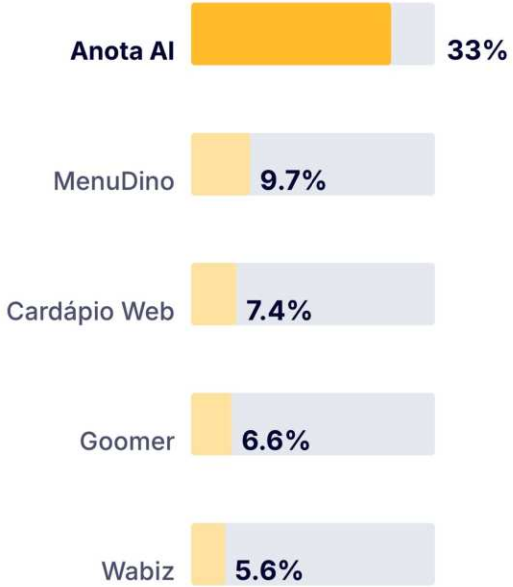
Anota AI leads online ordering in São Paulo and Rio



São Paulo

Online ordering: the five largest vendors

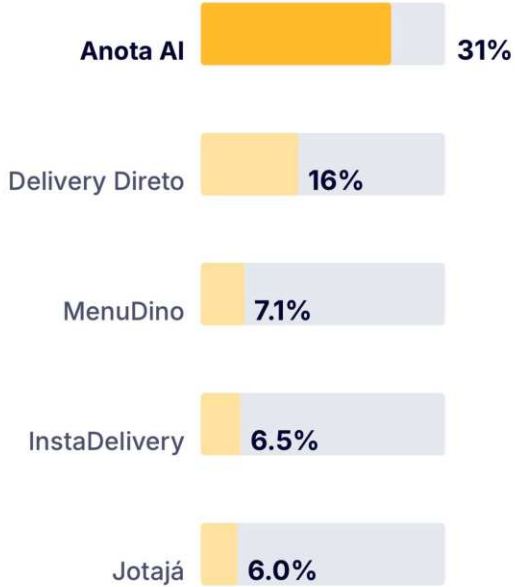
of 4,366 venues with a named ordering vendor



Rio de Janeiro

Online ordering: the five largest vendors

of 1,947 venues with a named ordering vendor



Source: Dashmote restaurant technology data, Oct 2026. iFood, a Prosus company, invested in Anota AI in 2022.

Two local platforms run booking in São Paulo and Rio

Booking platform, of restaurants listed on one

Online booking is still rare: about **3%** of table-service restaurants in São Paulo and **2%** in Rio de Janeiro show a booking platform.



Source: Dashmote restaurant technology data, Oct 2026. iFood, a Prosus company, owns Get In.

Independents show an ordering vendor more often than chains

Online ordering seen, chains against independents

In São Paulo an ordering vendor is seen for **17%** of independent venues and **9.6%** of chain venues; chains more often show an ordering link on their Google listing with no vendor named.



Chains: 5 or more venues of one brand in the city, or a known chain brand; small groups: 2 to 4 venues.

Source: Dashmote restaurant technology data, Oct 2026.

Asia Pacific

TRENDS

A regional platform leads online booking in seven of the eight Asia Pacific countries with a named leader.

WHAT IS INTERESTING

Card and dining rewards, led by the dining club EatClub, reach 15% of Sydney places.

WHO WINS WHERE

Square is the POS seen most often in Sydney and Melbourne.

WHICH VENUES

In Auckland, the platforms seen most often are local: restauranthub for booking and Ordermeal for ordering.



SYSTEMS ON THESE PAGES

- POS
- Online booking
- Online ordering
- Loyalty
- Card and dining rewards

Regional / local platforms lead online booking in Asia Pacific

Leading booking platform in eight Asia Pacific countries

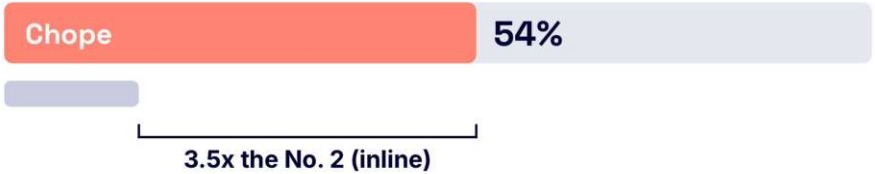


a regional platform leads a global platform leads

New Zealand: the national leader; in Auckland, restauranthub leads (p. 72).

Singapore

Share of the 2,767 Singapore restaurants with online booking seen



In Singapore, diners can book restaurant tables inside the Grab app, next to rides, delivery and payments.

In China, users placed nearly 200 million orders through Alibaba's Qwen AI assistant during the 2026 Spring Festival, in a subsidised campaign.

Source: Dashmote restaurant technology data, Oct 2026; Grab, Nov 2026; eHangzhou, Feb 2026. Prosus holds about 21% of Swiggy.

Global platforms are strong in Australia

Seen most often in each city: share of the places with that system seen

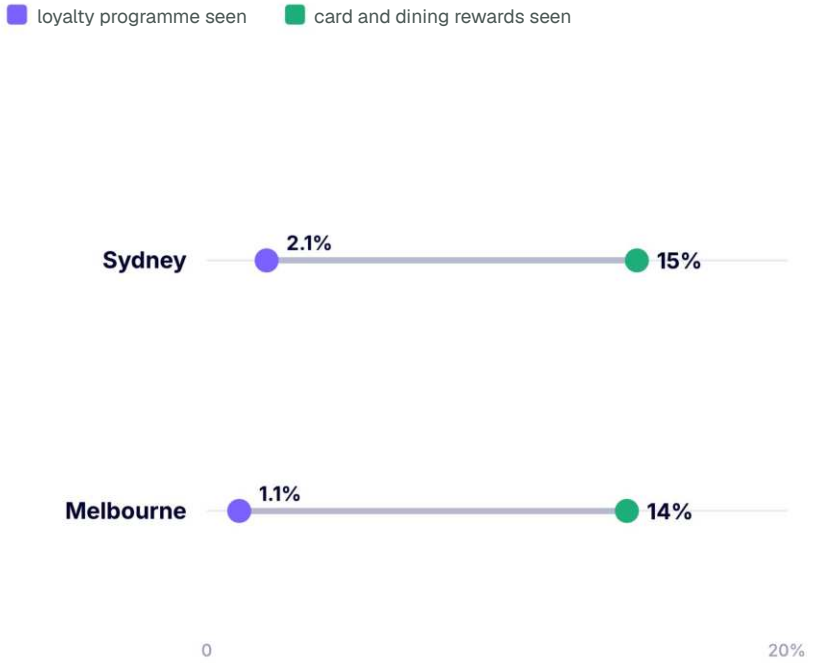


	POS	Online booking	Online ordering
Sydney	Square 44%	OpenTable 36%	Square Online 25%
		close: SevenRooms within 5 points	
Melbourne	Square 48%	OpenTable 63%	Square Online 25%
		2.9x SevenRooms	
Auckland		restauranthub 42%	Ordermeal 44%
		Now Book It 28%	

Source: Dashmote restaurant technology data, Oct 2026.

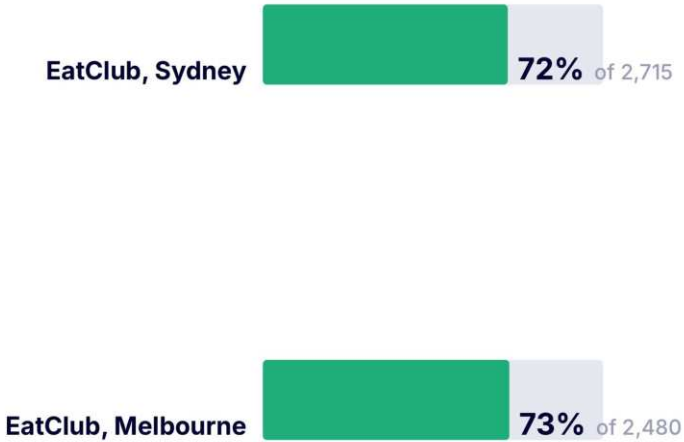
Dining clubs like EatClub beat restaurants' own loyalty programmes in Australia

Own loyalty seen against card and dining rewards seen



Sydney and Melbourne: chains' own loyalty schemes are not read.

EatClub's share of the places with card and dining rewards seen



Places listed on EatClub; in a given week only some have a deal live.

Source: Dashmote restaurant technology data, Oct 2026.

The vendors Dashmote measured for this report

United States	POS	Toast, Square, Clover, Oracle Simphony, MenuSifu, Chowbus
	Online booking	OpenTable, Resy, SevenRooms, Toast Tables, Tock, Yelp
	Online ordering	DoorDash Storefront, Toast Online Ordering, Grubhub Direct, Slice, ActiveMenus, Square Online, ChowNow
	Card and dining rewards	Bilt, Upside, inKind, Rewards Network, Seated
Europe	POS	Toast, Zonal, Oracle Simphony, Square, Vita Mojo, WRS Systems, SubwayPOS, McDonald's NP6, Lightspeed, 3S POS, Andromeda, Best Epos, Access EPOS
	Online booking	TheFork, Zenchef, DISH Reservation, OpenTable, CoverManager, ResDiary, Dojo Bookings, resmio, SevenRooms, gastronovi, Tebi, Foodamigos, uReserve, OKO, Guestplan, Restoo
	Online ordering	Flipdish, Vita Mojo, Foodhub, Storekit, Slerp, Sitedish, Foodticket, Cashdesk webshop, Uber Eats Storefront, Deliverect Direct, Deliveroo's branded ordering
	Card and dining rewards	Curve Cash
India	Online booking	Swiggy Dineout, District, EazyDiner
	Online ordering	DotPe
	Card and dining rewards	EazyDiner Prime
Brazil	Online booking	Get In, Tagme, Dionísio, Reservego
	Online ordering	Anota AI, MenuDino, Cardápio Web, Goomer, Wabiz, Delivery Direto, InstaDelivery, Jotajá
Asia Pacific	POS	Square, Redcat
	Online booking	Chope, inline, Tabelog, Hungry Hub, Oddle, Swiggy Dineout, OpenTable, SevenRooms, restauranthub, Now Book It
	Online ordering	Square Online, Ordermeal
	Card and dining rewards	EatClub, First Table

Source: Dashmote restaurant technology data, Oct and Nov 2026; PayU, Mar 2021; The Paypers, Sep 2022; Bilt Rewards, Oct 2022; Prosus, Nov 2026. iFood, a Prosus company, invested in Anota AI in 2022 and owns Get In. Prosus holds about 21% of Swiggy. PayU, part of Prosus, has invested in DotPe. Prosus has invested in Bilt.

How we find the systems each restaurant uses

Dashmote tracks restaurants across 60+ countries and 100+ platforms.



1 Read public signals

Our own technology reads each restaurant's public signals: its website, booking and ordering widgets, map listings, Google's order button and delivery storefronts.

2 One record per place

Every signal lands in one record per place, listing the systems seen at that restaurant:

- POS
- Online booking
- Online ordering
- Loyalty
- Card and dining rewards

3 Sample-checked

Samples of detections are checked before any figure is published.

4 Count on a stated base

Each share is counted on a base named on the chart. Bases differ by system and city.

HOW TO READ THE NUMBERS

A minimum.	A system that leaves no public trace is not counted, so true use is higher. 'Up to' marks an upper bound, for the same reason.
Places.	Open eating and drinking places with recent reviews, each city on its own base.
Leads.	At least 5 points ahead, measured before rounding. No share is shown on a base of fewer than 20 places.
Funding.	Dealroom.co data; totals include shop technology.

Source: Dashmote restaurant technology data, Oct and Nov 2026; Dealroom.co, Q3 2026. Names and logos are trademarks of their owners.

About the partners

prosus Ventures

Technology investor and builder

Prosus Ventures is the early-stage investment arm of Prosus, one of Europe's largest technology companies. We back founders who will shape Prosus's ecosystems over the next decade in AI, fintech, commerce, logistics, deep tech and robotics.

Since 2015, we've invested $2.3B+ in more than 100 startups across 20+ countries. Our portfolio of businesses serve more than a billion customers across Latin America, India and Europe.

Contact: sebastiaan.vaessen@prosus.com

DASHMOTE

A restaurant outlet data & AI company

Dashmote uses AI to map the out-of-home food and drink market restaurant by restaurant, in 60+ countries and across 100+ delivery platforms: the booking, POS, online ordering, loyalty and rewards systems each venue runs, its menus and its delivery storefronts.

Food and drink brands, technology providers and investors use it to size markets, find accounts and track share. AI agents can read it directly through Dashmote's API and MCP server.

Backed by investors from the United States and Asia, and named Best Startup by Google and McKinsey.

Contact: stefan@dashmote.com

dealroom.co

Start-up and funding data

Dealroom.co is a data platform on startups, scale-ups and venture capital funding, used by investors, companies and governments. It supplied the funding pages of this report.