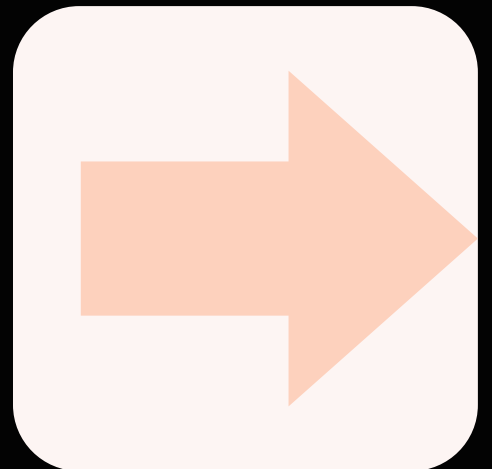
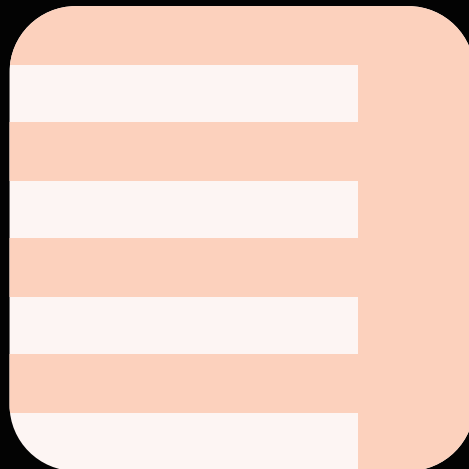
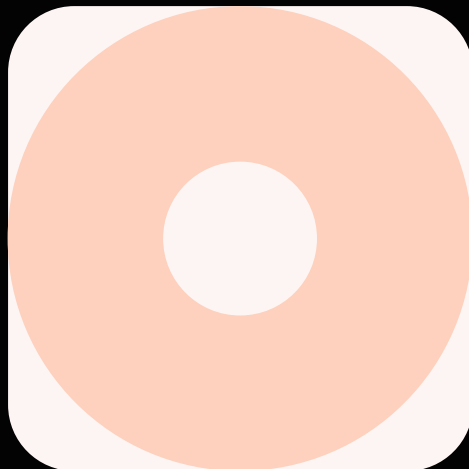


 Square



# The Future of Restaurants



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## Stats at a glance

**91%** of restaurants are looking to kitchen automation technology to help streamline their operations in 2021.

**3 in 4** restaurants plan on offering contactless ordering and payments options across all channels.

**59%** of consumers are willing to buy items that are not part of the restaurant's core offerings.

**42%** of restaurants plan to invest in customer loyalty programs.

Restaurants that are using online ordering for delivery and takeout expect **62%** of revenue to come through those channels.

**67%** of consumers prefer to use a restaurant's own website or app for food delivery.

**92%** of restaurant owners and managers are open to experimenting with their menu.

**88%** of restaurants would consider completely switching from physical to digital menus.

After chef Anthony Strong closed his popular San Francisco restaurant Prairie last August in the wake of COVID-19, he didn't give up. He emerged a couple months later with a new concept: He transformed his 1989 Volkswagon van "Stella" into a mobile dining room, traveling the city to serve up a four-course "glamping" dining experience. While shuttering Prairie was devastating, Strong did what restaurateurs have done time and again — he refused to back down in the face of adversity.

"This awful forced experiment has allowed us to bear witness to some of the most incredible pivot stories, whether it's hosting high-end experiences out of camper vans or building virtual cooking-class subscriptions that can make for the more-than-ideal first date," says Rajat Deva, Product Marketing Manager for Square for Restaurants. "All of this creativity is so exciting to see and it speaks to the fierce resilience that restaurant owners have. They are determined as hell to get through this."

While 92% of restaurateurs say they are anxious about the next six months, the future is full of exciting developments for the industry. **Restaurants are entering a new era, investing in changes designed to make them more efficient and able to provide a frictionless customer experience, without being boxed in by a single revenue stream.**

To get a deeper understanding of where the industry is headed, Square interviewed restaurateurs and industry experts, and partnered with Wakefield Research to survey 500 restaurant owners and managers as well as 1,000 consumers across the U.S. All data referenced in this report comes from the restaurant and consumer surveys. Learn more about the surveys in the Methodological Notes\* section at the end of this report.

Here's how the restaurant industry is evolving to meet customers where they are, embrace technological advances, and build a loyal community.



**Restaurants are embracing new channels for customers to interact with their business, effectively meeting them wherever they are.**

— Bruce Bell, Head of Square for Restaurants



# The restaurant evolution

Restaurants aren't just about the food; they are an emotional experience. Customers share their biggest moments and their everyday routines with the restaurants they love. And while the pandemic changed the way that looked, it hasn't changed how entrenched restaurants are in people's lives. **The role of restaurants is simply evolving.**

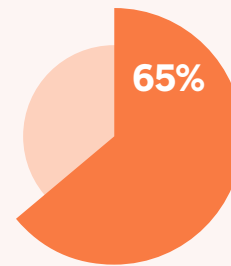
Even now consumers are helping restaurants stay open by embracing new kinds of dining experiences, both on-premise and at home through delivery and takeout. In fact, **59% of consumers say they are either very likely (26%) or somewhat likely (33%) to buy items from restaurants or retail stores that are not part of their core offerings.**

"We're seeing that the defined, straight vertical lines of your retail business versus your restaurant versus your services business are all blurring," says David Rusenko, Head of eCommerce at Square. "I think this blending of verticals is a really big trend that we're starting to see, and it's going to turn a lot of businesses into 'multi-hyphenates.' A restaurant-bar-store, for example, might be a place that sells mixology classes, retail gear, and tastings in addition to serving patrons food and drinks."

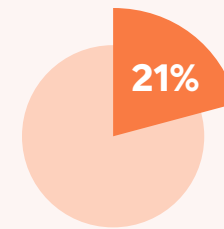
## For the love of restaurants, customers face the cold

When it comes to on-premise dining, much of the action has migrated outdoors (as indoor dining has become limited or non-existent in some regions). The move outside has staying power with consumers: Over a fifth of diners think outdoor seating is critical for safety, and 65% of them would choose outdoor seating even when it's cold outside (21% even say they would take outdoor seating regardless of whether there is any heating equipment outside, exemplifying just how much people crave the restaurant experience). About half of restaurants plan to continue offering outdoor seating in 2021.

For restaurants, it's reassuring to know that customers are dedicated to enjoying a meal on-premise, even if it means braving the cold. And for the restaurants that are considering a temporary hibernation for the winter months, 94% of consumers said they'd welcome them back with open arms.



of diners would choose to sit outside even when it's cold.



would do so even without heating equipment.

## Where's the chilly reception?

Eighty-eight percent of restaurant owners or managers, including 94% in the U.S. South, are offering outdoor seating in the colder months. 41% of winter-weary Southerners, however, would choose indoor dining instead.





## What a restaurant expert sees coming in 2021

**Bruce Bell, Head of Square for Restaurants**

Everyone loves food, and there's no replacement for the social interactions inherent to the experience of eating at a restaurant (regardless of whether it's a full-service or quick-service establishment).

Even now, with consumers and restaurateurs putting safety first and focusing a lot on delivery and takeout, the relationships between the restaurant, the customer, and their shared community are what's most important. Restaurateurs are looking for ways to use technology to connect those things together, while keeping the kitchen at the heart of everything they do.

**Some exciting developments I see happening include:**

**Restaurants using technology** to unify point-of-sale and customer-order operations with things like payroll and scheduling – helping them manage their entire business in one place so they can just focus on customers.

**Collaborative models among restaurants**, in which multiple establishments team up to either work from shared ghost kitchens, or engage in group purchasing so that everyone can get the supplies or ingredients they need in shared bulk orders.

**Innovations around new and interesting kinds of customer experiences** that go beyond traditional restaurant fare – with emerging trends like drive-through and drive-in dining, meal kits, and special-event offerings.

These are all ways that restaurateurs are looking ahead, and they complement the many pandemic-related changes (like the shift to takeout and delivery, and the rise in touch-free tech) that they've already implemented across their businesses. **As technology extends deeper into kitchen operations, restaurants will find new ways to be efficient in the kitchen — even incorporating artificial intelligence — helping them save costs as they run their businesses across multiple revenue streams seamlessly.**

# Embracing contactless commerce — with a human touch

While restaurants are eager to put 2020 behind them, 85% of them say they completely reorganized to weather the pandemic — and many of those changes are being embraced by restaurateurs and customers.”

**“The pandemic didn’t change the trajectory of where restaurants were headed, but it did force the future,”** says Bruce Bell, Head of Square for Restaurants.

Restaurants’ move to embrace touch-free technology, for example, has been a major shift in the way they do business, and that’s not going away any time soon: About three-quarters of restaurateurs plan on offering contactless tech in 2021, including contactless payment on site. Eighty-eight percent of restaurants say they are considering a switch to digital-only menus. Almost half of restaurant owners or managers who already offer digital menu access using URL or QR codes plan to continue, with 47% of that segment saying they are “very likely” to completely replace physical menus with digital menus for apps or websites.

“If you go to other markets outside the U.S., everything’s contactless, and payments are often taken tableside,” says Bell. “The human-interaction element of dining is never going to go away, but I think U.S. restaurants will use touch-free payments and QR-code menus in a way that will help them turn more tables and save costs on the overhead of menus and labor. Technology like this enables restaurants to keep the heart of the restaurant experience, but in a more efficient way.”

“I definitely think the ability to order at your table is going to be the norm, even post-COVID,” says Jeff Krupman, the owner and entrepreneur behind San Francisco’s [PizzaHacker](#). “My sense is that given the choice, most people will choose to order and pay on their phone. How often is there a technology that costs nothing, saves a restaurant money, improves the experience for the customer, reduces errors, and ends up effectively increasing the employee tips?”

## Pandemic-era protocols continue

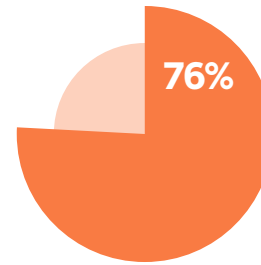
COVID-19 required restaurants to make changes designed to help keep their customers safe. Outfitting staff in masks and gloves, keeping tables six feet apart, engaging in enhanced cleaning efforts, and conducting body temperature scans of patrons are now essential parts of the day-to-day running of a restaurant. These efforts are likely to continue for some time: A majority of restaurant owners or managers will continue to require their staff to wear masks and gloves (69%) and provide socially distanced tables (60%) in 2021.



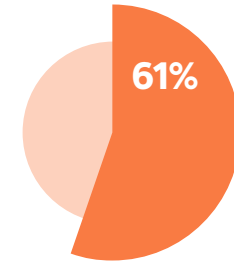


“ **The pandemic didn’t change the trajectory of where restaurants were headed, but it did force the future.**

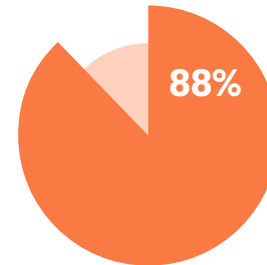
— Bruce Bell, Head of Square for Restaurants



of restaurants plan to continue offering contactless tech.



of restaurants plan to continue offering on-premise contactless payments options.



of restaurants would consider completely replacing physical menus with digital menus.

### Did you know?

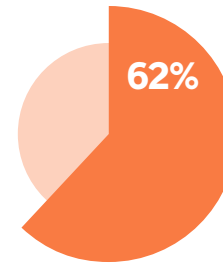
Square’s self-serve ordering solution lets customers scan QR codes from a table, walkup window, parking spot, or other location to order and pay from their own device. Orders are sent straight to the restaurant’s point-of-sale and kitchen display systems just like server-entered orders would be, but with heightened safety, convenience, and accuracy. [Learn more about Self-Serve Ordering.](#)

# Delivery and takeout reshapes restaurant operations

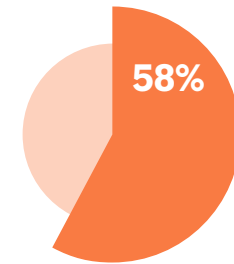
Restaurateurs are finding that the shift to delivery and takeout is here to stay. The average restaurateur expects that **62% of their 2021 business revenue will come from delivery and takeout**, and 18% of restaurant owners and managers expect to be completely dependent on delivery and takeout in 2021.

For restaurants, embracing online ordering and takeout requires both a digital infrastructure for taking customers' orders and payments, and delivery personnel and resources. This can be achieved through a first-party ordering hub on a restaurant's website with a third-party delivery app (like Postmates or Uber Eats) or with a combination of both.

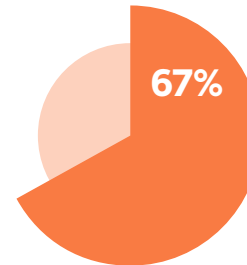
Restaurateurs do prefer to use their own websites and apps as direct channels for customer orders. Nearly three in five restaurant owners or managers (58%) would rather use their own website or app for food delivery than that of a third-party app. Consumers feel the same way: 67% of consumers prefer to use a restaurant's own website or app for food delivery rather than a third-party app, and 61% of those consumers say it's because they want to better support the restaurant.



average revenue restaurants expect from takeout/delivery.



restaurants that prefer to use their own website/app for delivery orders.



consumers who prefer to order delivery directly from restaurants.

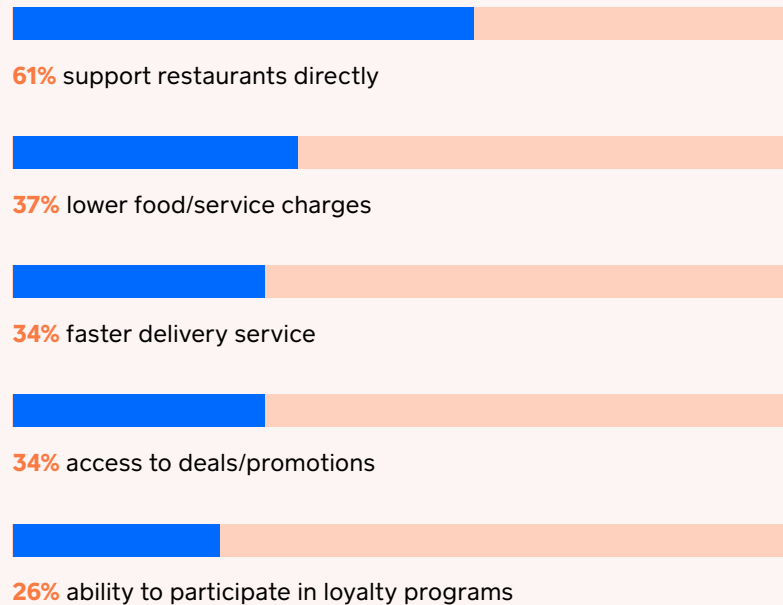
## Did you know?

Square On-Demand Delivery allows you to offer third-party delivery directly from your site with no commission fee. You can easily manage all your courier orders in one place to capture and glean valuable insights from your customer data. You can also include customers who order delivery in your marketing communications and enroll them in loyalty programs. [Learn more about On-Demand Delivery.](#)



“Having a direct ordering channel gives restaurateurs more control over how they engage consumers with marketing and loyalty programs,” says Bell. “And if the restaurant has its own couriers, or leverages Square to provide third-party couriers via [On-Demand Delivery](#), there’s an even bigger opportunity to own the end-to-end customer experience in a really efficient way. Direct delivery has the potential to become vital to restaurants’ operations.”

### Why consumers prefer ordering delivery directly from restaurants



**Explore more on embracing online ordering:**

[How to Optimize Your Menu for Takeout and Delivery](#)

[10 Ways to Increase Food Orders Through Your Online Channels](#)



## How to get your website in front of customers

**Rajat Deva, Product Marketing Manager for Square for Restaurants**

Third-party delivery platforms offer a lot in terms of marketing and discoverability for your business, but you have other options to spread the word about your own website and ordering hub. A few ways you can attract customers to order directly from your website are:

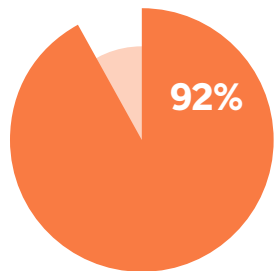
- **Connected touchpoints:** It’s more important than ever to build your own online presence, and it doesn’t just stop at the website: building as many touchpoints as you can across social media, email, review sites, and search so your customers have a consistent experience is important and increases your chances of discoverability.
- **Active social media:** Have an Instagram page that can drive both conversation and sales with customers, and update your page consistently. If you’re not sure when to post, try doing it around lunch or dinner time when you know your regulars are hungry and scrolling their phones for options.
- **Up-to-date business pages:** Accurate NAP (name, address, phone) data is really important to connect with customers on all platforms: Google for Businesses, Facebook, Yelp, Foursquare, and yes, even the Yellow Pages. Being consistent across all of these platforms will help with getting better visibility on search engines.

# Change is on the menu

Leaning into takeout and delivery is just one way restaurateurs have reimagined how they do things.

The large majority of restaurants are looking at menu changes as a separate way to meet customers' changing preferences: **92% of restaurateurs say they are likely to make menu changes**, with 47% planning to cut items or completely change their menus in 2021. Luckily, 41% of consumers say they are willing to try new menu offerings.

“Tapping into your inner sense of creativity can reveal a lot of new ideas, some that might even turn into best sellers over time,” says Deva. “Of course food costs are most important, followed by the need to make dishes that can travel well in a courier bag, but giving staff a chance to hone in on their creativity under these constraints can sometimes make for fantastic results.”



of restaurants plan to make menu changes.



## How Kura Sushi keeps customers engaged with online ordering

When indoor dining was halted last year, Kura Sushi CEO, Hajime “Jimmy” Uba didn’t let that stop the restaurant from giving customers an amazing experience. They quickly rolled out online orders with Square Online, and focused on providing customers with a seamless online ordering experience.

“Through our new partnership with Square, we are now able to offer online ordering through our home page and mobile ordering through our app,” says Uba. “We really do think that the ease of use that Square provides, as well as our ability to price the same way that we do in restaurants, has done a tremendous job in terms of attracting our guests.”

Since adding online ordering at the end of last year, Kura Sushi has been able to streamline orders through a centralized system which has created a better ordering experience for their guests as well.

“Notably, December was the first month where the majority of our off-premises orders were placed online, as opposed to through in-person or a telephone, confirming the positive impact that the frictionless guest experience can have in encouraging guests to use Kura Sushi as an off-premises occasion.”

### Learn more about diner engagement tactics:

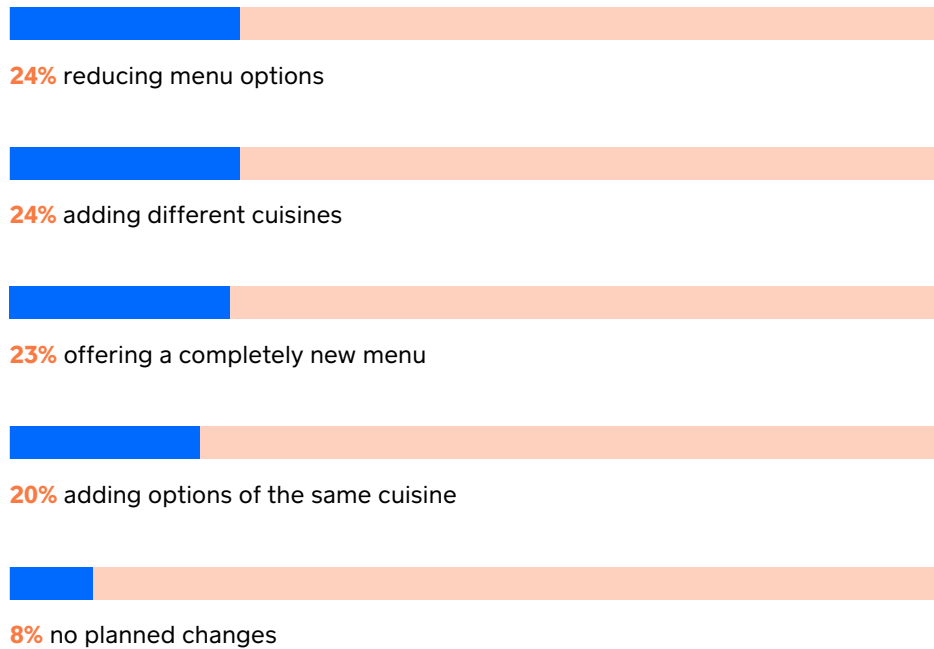
[The Comeback of Drive-in and Drive-Thru Experiences](#)

[How Taziki’s Mediterranean Cafe Is Building Customer Loyalty to Increase Sales](#)

As they test out iterations to their menus, restaurateurs are learning as they go.

“We have learned, by necessity, to operate within new margins,” says Charlie Marshall, chef and owner of The Marshal in New York City’s Hell’s Kitchen neighborhood. “I do believe, however, that as things return to normal, diner preferences will continue to evolve, and so shall we. Delivery was never a huge part of our business pre-COVID, but I think it will remain a large part of our business post-crisis. Pizza was never on the menu pre-COVID, but I think it will remain.”

### How restaurants are planning to change the menu



### An elegant at-home experience

San Francisco's Maison Danel had only been open for a month when stay-at-home orders were announced. Inspired by the tea salons of Paris, the French patisserie was all about their signature afternoon tea experience. Owners David and Danel de Betelu never planned to do delivery or a significant amount of takeout, but circumstances meant they needed to pivot.

“We were thinking this is the time to sort of innovate ... That’s when we focused on exquisite packaging,” says David. “You open up a big pastry box and inside there’ll be little pastry boxes, one of them with little finger sandwiches, another with cakes. It’s all tied up with a beautiful, colorful ribbon. People can have sort of the same elegant experience at home, right?”

David says the takeout and delivery experience will be permanently on the menu, even after the tea salon is able to entertain guests again.

“Everything was going toward online and delivery anyway, but I think the pandemic just accelerated that tenfold,” David says. “Yes, people will be super excited to go back to restaurants, bars, and entertainment venues. But I think they’ve also learned the importance of the connection with their family, having a meal together, sharing special moments with close friends. I think all of that will continue. And so by us having that experience of doing takeout and delivery and focusing on not just the in-store experience but the at-home experience, I think that can only help us in the long run.”

#### Learn more about adapting to new realities:

[Outdoor Dining Bubbles: The Pros, Cons, and Costs](#)

[Should Your Restaurant Go into Hibernation for the Winter](#)

# Streamlined kitchen operations open up a world of possibilities

In order to take advantage of opportunities like multiple revenue streams and creative dining experiences, the back of house needs to be buttoned up. Restaurants are turning to digital technology en masse to improve internal processes. In fact, 91% of restaurants have made — or plan to make — investments in kitchen automation technology. After all, a couple of lost tickets can spell disaster for a busy kitchen. With seamless communication between multiple ordering channels, front of house, and back of house, the possibilities are endless.

“We’re seeing more of a hub-and-spoke model with the kitchen at the center of it all,” says Bell. “Restaurants are embracing new channels for customers to interact with their business, effectively meeting them wherever they are. Each of these channels represent a revenue stream for the restaurant, and they connect to the same kitchen and are all managed by the same centralized POS system.”

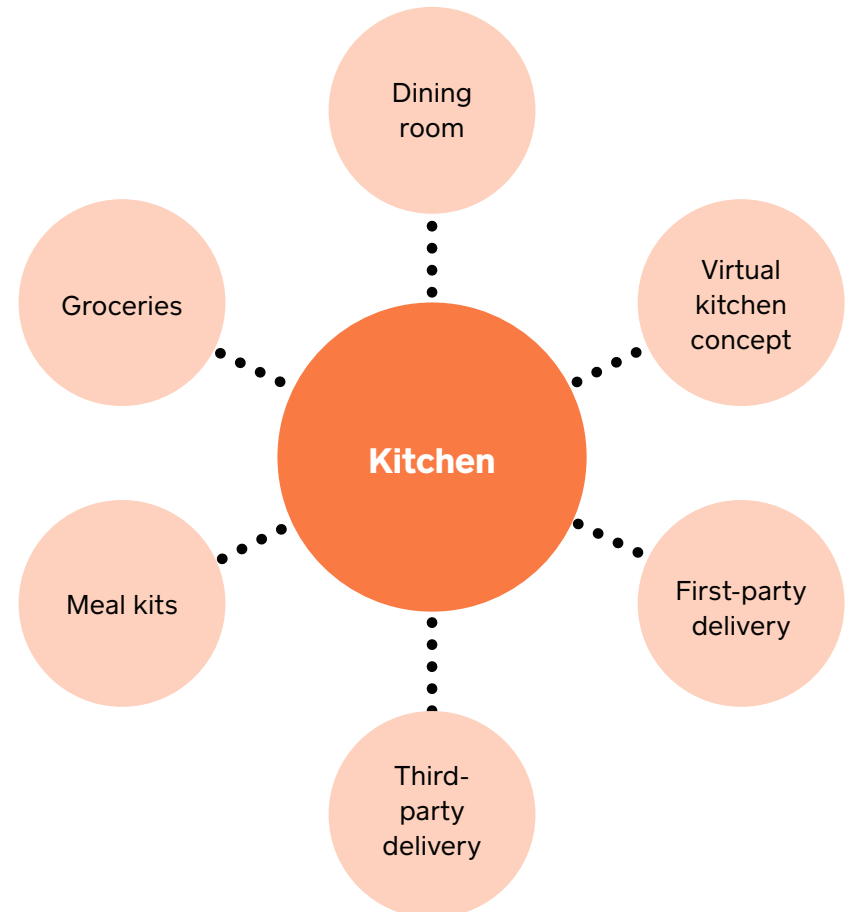
“One channel might be the dining room, one channel might be first-party delivery, one channel might be meal kits, and so on,” adds Bell. “Having the kitchen run as efficiently as possible extends that efficiency into all of those channels.”

Mediterranean fast-casual chain The Kebab Shop had already invested in kitchen automation technology when the pandemic hit, and it allowed them



**We’re seeing more of a hub-and-spoke model, with the kitchen at the center of it all.**

— Bruce Bell, Head of Square for Restaurants







**Learn more about back-of-house change:**

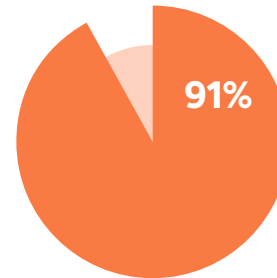
- [How Restaurants Are Modernizing Kitchens and Streamlining Orders](#)
- [5 Ways to Streamline Your Restaurant Kitchen Operations to Increase Customer Satisfaction](#)

to quickly pivot and add additional ordering options like curbside pickup, which owner Wally Sadat says will remain available indefinitely.

“We’re really lucky that we keep everything in the same ecosystem,” Sadat explains. “We were already digital-forward, so when it came to implementing something on the fly, like during COVID, we were in a good position.”

Another benefit? Restaurants are better set up to let their creativity flow.

“Ghost (or cloud) kitchens are trending topics right now, but we’re seeing it become a real, growing segment,” says Deva. “With a streamlined and equipped kitchen, there’s nothing physically stopping you from trying four or five new restaurant concepts at a time, and then picking the winner once one of those concepts is proven.”



of restaurants have or plan to invest in automation technology.

**Did you know?**

Square for Restaurants’ kitchen display system seamlessly displays and organizes order tickets no matter where they’re placed — whether that’s from the restaurant’s point-of-sale, Square Online site, or online ordering platforms like DoorDash and Postmates. [Learn more about Square for Restaurants.](#)

# Keeping customers hungry for more

Restaurateurs are also exploring new ways to capture customers' interest and create experiences that keep them coming back. About **90% of restaurateurs are planning to implement customer engagement initiatives** for better business retention.

With the shift toward more customers choosing pickup over delivery, for example, many restaurateurs are looking into ways to expand the experience customers have when picking up their orders by vehicle.

The future includes more than just curbside and on-site takeout options: 52% of restaurateurs plan to offer a drive-through service for takeout in 2021 – enabling customers to pick up their orders via a window without leaving their vehicles. Forty-eight percent of restaurateurs plan to offer the classic 1950s-style model of drive-in dining in which customers park on site to eat in their cars. (This model often involves ordering on site and waiting for someone to bring you your meal.) Forty-six percent of restaurateurs plan to offer a hybrid model of drive-through dining in which customers follow a drive-through track to collect their meals and then eat in their cars.

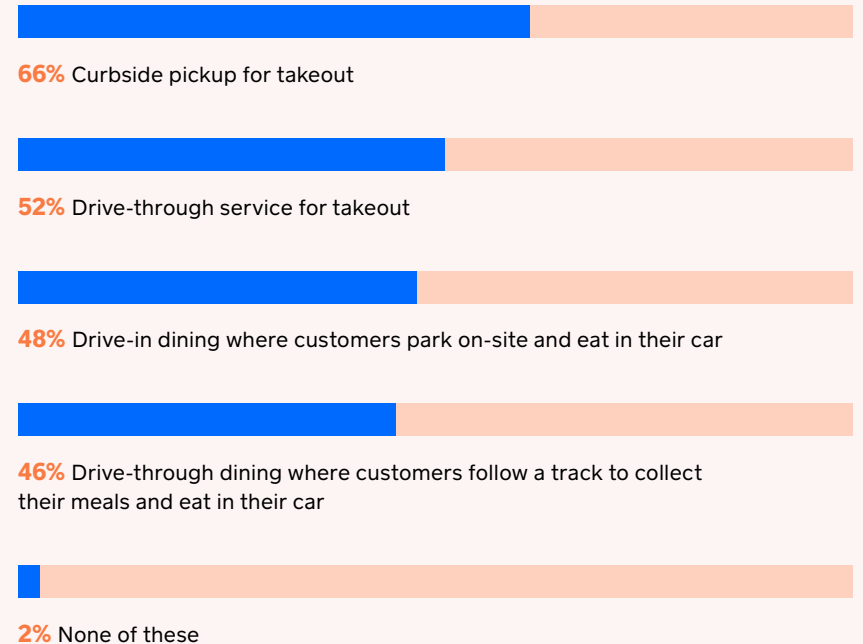
Whether on premise, takeout, or delivery experiences, restaurants are considering how they can better integrate into customers' lives — no matter where they are.

Forty-one percent of restaurant owners or managers are investing in special-event initiatives such as personalized dining experiences for major holidays. Other popular plans include offering meal or cocktail kits (37%), pre-made frozen food options (32%), or subscription services (31%) such as wine or food clubs. In addition, nearly a third of restaurateurs plan to offer

online cooking classes as well as virtual tastings or dining events.

“A lot of restaurants are exploring new ways of reaching customers, like selling retail offerings or planning event-based experiences,” says Bell. “They’re finding that creating an online grocery business can be a worthwhile revenue stream, or that prix fixe menus can give customers a really special experience — even at more casual restaurants and with lower price points.”

## Restaurants plan to offer the following in 2021

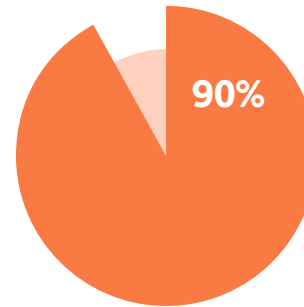


# Smarter loyalty programs feed customers more of what they want

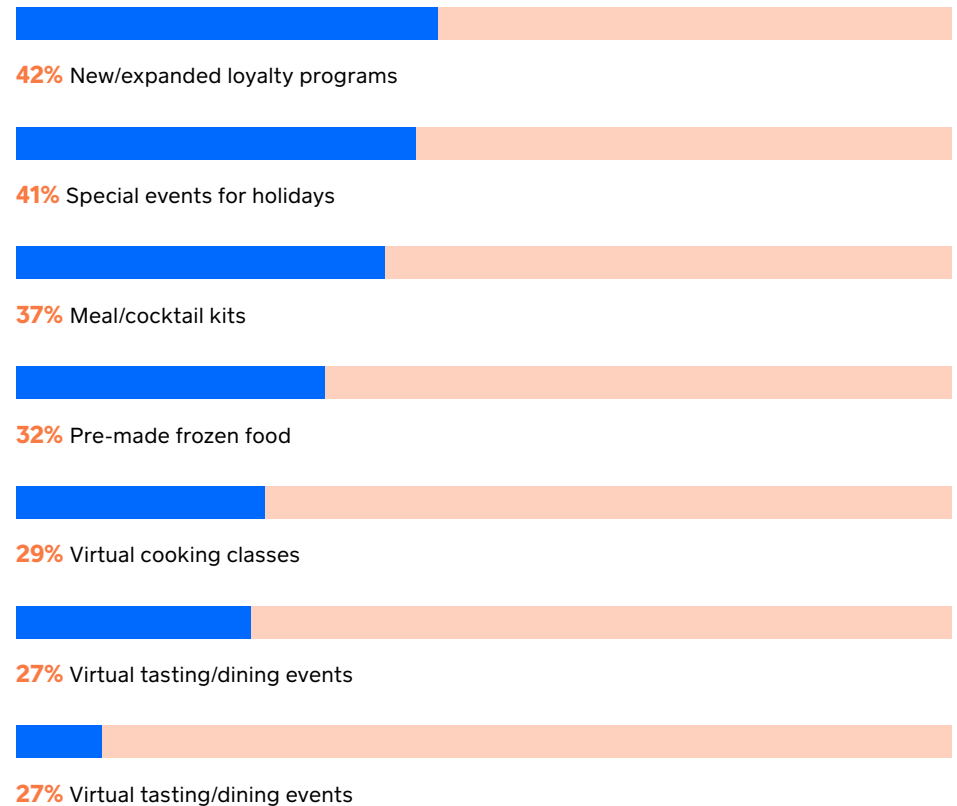
Loyal customers are what drive the restaurant industry, supporting it in good and bad times. In fact, 42% of restaurateurs plan to offer new or expanded loyalty programs. At first glance, a loyalty program might seem nice to have or bring to mind images of a punch card. **But the right loyalty program can provide so much more, helping restaurants connect with and better understand their customers, which translates to more orders.**

“Many restaurants are offering some sort of digital loyalty program that allows diners to become regulars, even from home. The key piece here is to use a loyalty provider that can intelligently parse your customers by their visits and ordering habits,” says Deva. “The ability to group your customers according to what is most relevant to them, whether it’s the time since their last visit, their ordering history by item or category, or their total average sales, can be incredibly powerful.”

Having this information enables restaurants to effectively market new menu offerings or additional concepts and revenue streams in a personalized way to customers who already support the business.



of restaurants plan more customer engagement initiatives in 2021, including:



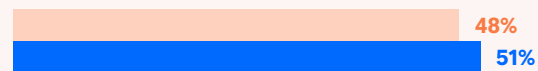


## Centers of the community

As the restaurant industry reinvents itself, the one thing that won't change is its fierce commitment to supporting the community. Restaurants were pivotal in organizing for social change and providing for those in need throughout 2020, and 92% plan to do more community engagement in 2021.

What restaurants are planning

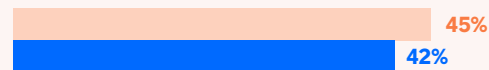
What consumers want to see



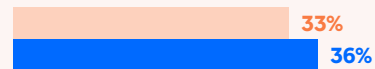
Cooking for community service providers



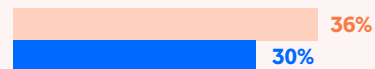
Donating to community organizations



Providing food to local events



Sourcing locally



Supporting minority-owned businesses



## Did you know?

On average, Loyalty boosts repeat business by 40%. Square Loyalty integrates with your Square POS system and Square Online, allowing your customers to earn Loyalty points from both in-person and online purchases, seamlessly. [Learn more about how Loyalty helps create better connections and increase customer retention.](#)



## Why Craft + Carry feels like a neighborhood bar, even online

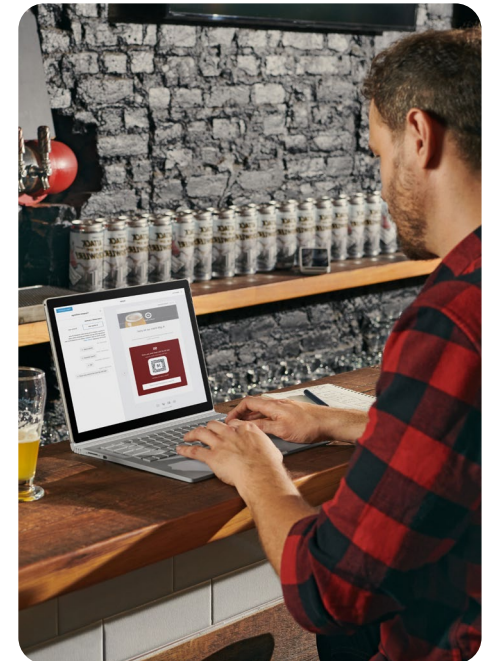
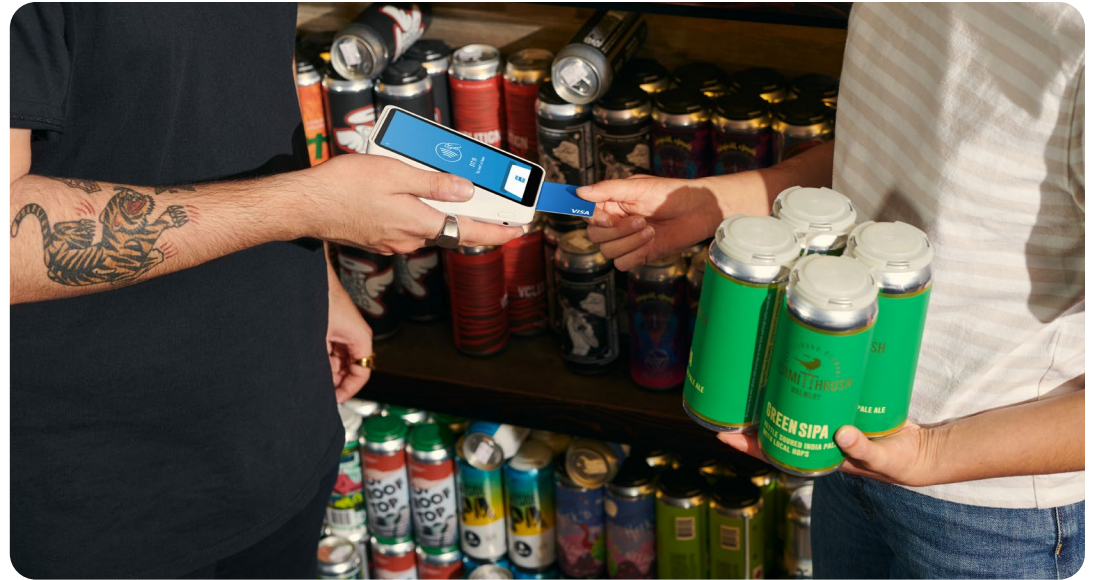
Craft beer bar and bottleshop Craft + Carry in New York understands that a sale isn't just a sale, it's an opportunity to create a customer connection and build brand loyalty.

"Square Loyalty does a great job in keeping us connected with our customers. It keeps them motivated to come in again and again, and make purchases. Customers can redeem their points for pint glasses, bottle openers, gift cards, growlers, all sorts of things," shares owner Dieter Seelig. "The feedback has been overwhelmingly positive. Our customers love it."

Customer connection doesn't just have to happen in person. Craft + Carry works hard to maintain and grow their customer base, and email marketing was an easy extension of the relationship-building the staff was doing in the taproom.

"We send out a weekly newsletter with Square Marketing, letting our customers know about new beers that are coming out, new breweries that are opening, or events that are happening nearby," says Seelig. "Being able to let customers know that some awesome new beers are coming out ... they tend to run in as soon as they get those emails. It's a great way to keep in touch."

Craft & Carry used SMS and email to target customers who previously ordered Belgian white beers with an automatic buy one, get one discount on a new Belgian white if they brought a friend on their next visit.



# Restaurants work to ensure the show *will* go on

Restaurants are determined to build an experience — not just for today, but for an ever-evolving future.

“The restaurant industry realizes it can’t put off adopting technology and streamlining operations any longer, because the competitive landscape is changing,” says Bell. “Moving forward, restaurants are not only open to change, they’re investing heavily in it.”

We’re already seeing the results of these changes, as restaurateurs take advantage of opportunities to launch new channels and seamlessly connect with customers in innovative ways.

“Now your digital experience is just as important as your food experience,” asserts Wally Sadat, owner of The Kebab Shop, adding that embracing technology has paved the way for him to open at least five more locations in 2021.

“The show must go on. I feel like that’s a phrase every restaurant owner or chef has always known,” he says. “Because food can be burning, your employees call out, your vendor goes missing. You just have to make things work. That drive helped us survive and will just make us stronger for future growth.” ■



**Moving forward, restaurants are not only open to change, they’re investing heavily in it.**

— Bruce Bell, Head of Square for Restaurants





# Methodological notes

The Square Restaurant Trends Survey was conducted by Wakefield Research among 500 Restaurant Owners & Managers between December 9, and December 21, 2020, using an email invitation and an online survey.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in the restaurant trends study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 4.4 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

The Square Consumer Survey was conducted by Wakefield Research among 1,000 nationally representative U.S. adults, ages 18+ between December 9, and December 21, 2020, using an email invitation and an online survey. The data was weighted to ensure reliable and accurate representation of the U.S. adult population, ages 18+. Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in the consumers study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 3.1 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

## About Square

Where others see challenges, business owners see possibilities. Square builds tools that let businesses bring those possibilities to life by enabling them to reach customers online and in-person, manage their front- and back-of-house operations, and access financing. Square can help your business succeed — on your own terms. Learn more at [squareup.com](https://squareup.com).