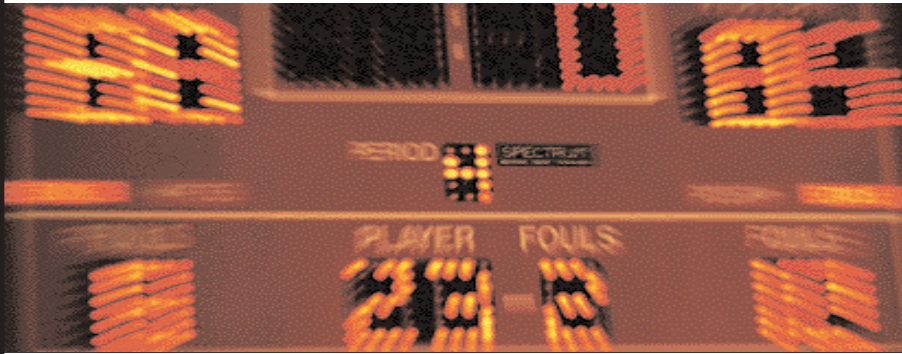


HOSPITALITY TECHNOLOGY

POS SCOREBOARD

A SUPPLEMENT TO
HOSPITALITY TECHNOLOGY

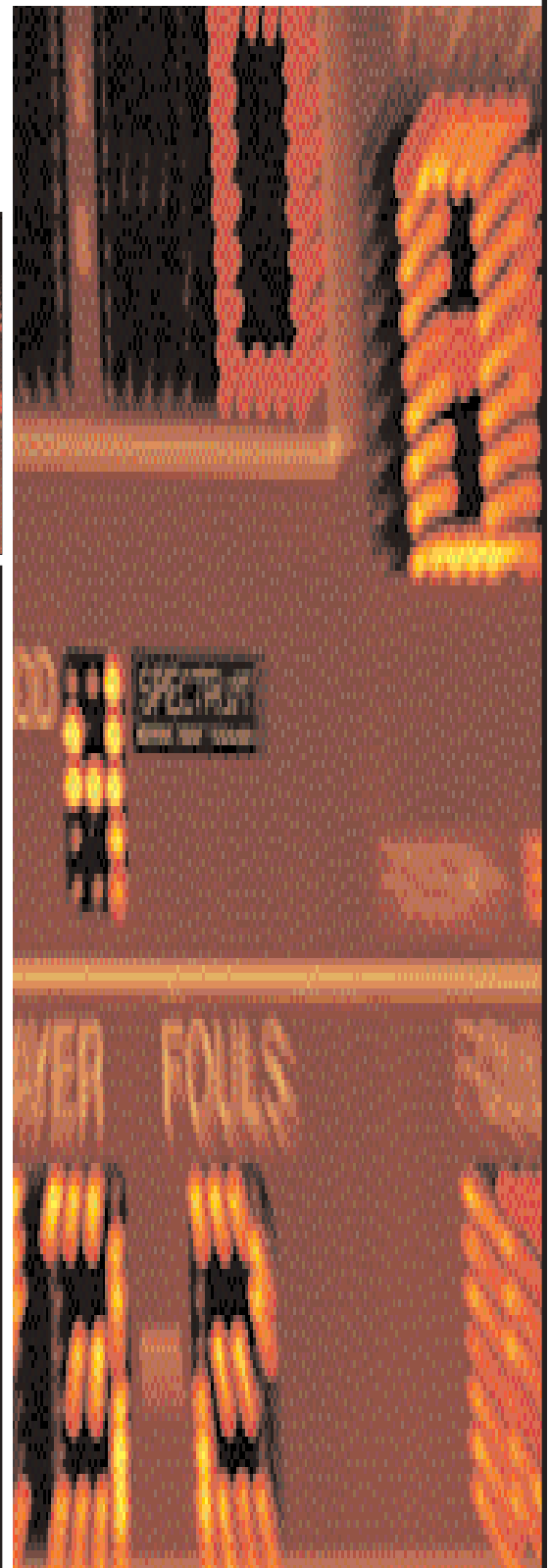
July/August 2004



THE TOP



Performing POS Companies
Based on User Satisfaction
and Functionality



Top 10 POS Companies >> Medal Winners >> Top Rated POS Products >>
User Satisfaction Scores >> Segment Watch

Score Keeper's Note

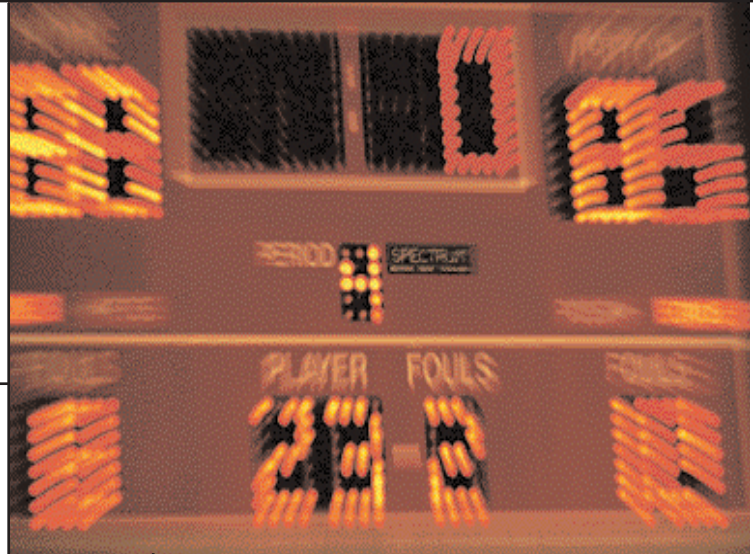
When *Hospitality Technology* magazine first conceived of the POS Scoreboard we knew we had a challenge in front of us. With more than 50 companies selling point-of-sale systems to the foodservice industry, it is both a diverse and at the same time highly competitive industry segment.

Many people told us it couldn't, or shouldn't be done. After all, how do you compare a POS system designed for pizzerias with one used only by hotels? How do you write about global companies with years of experience and new start-ups? Needless to say, we ignored that advice. It wasn't easy to balance all these competing concerns, but in the end we created what we believe is the most accurate, fair and appropriate analysis of foodservice POS technology that exists today.

We at *Hospitality Technology* would like to thank the more than 350 respondents that took the time to evaluate their POS systems. Whether it was a senior vice president information technology at a Fortune 500 company or a restaurant general manager we counted every vote and listened to every comment.

And we hope the technology vendors do too. The results of this study should provide a powerful indicator of which POS companies are hot. All ten of the companies to make the top 10 should be proud. Some excelled in ROI, others in service and support, some had a highly regarded POS solution while others performed well across the board. However it happened, they all made it to an elite list of top POS performers.

The ultimate goal of the POS Scoreboard is to provide a benchmark for judging POS solutions in a crowded field. The challenge for the ten companies in the top ten and all the top performers is to maintain their elite positions. Now the competition really begins.

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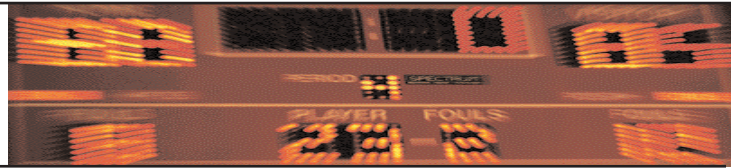
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Top 10



What does it take to have a top rated POS solution? The answer is simple: A broad range of POS functionality that answers the needs of restaurants and foodservice operators and happy users. That's it. The ten companies listed below are focused in a variety of markets, ranging from hotels and casinos to table service restaurants and quick-service restaurants.

The POS Scoreboard was built in much the same way as many RFPs. More than 50 POS companies were identified for the purposes of this study and each company was sent a detailed questionnaire. Foodservice POS vendors were given a list of 42 specific POS functions designed for foodservice operators. Companies could receive a maximum of 40 points in this section for functions like, gift card, drive thru, kitchen display and more. In addition, companies could receive up to 10 points for the

number of foodservice terminals installed (not just sites) worldwide. Another five points were awarded for company revenue (at the request of a number of companies, the installations and revenue data have been kept confidential). Companies could receive a maximum of 55 points in this "objective" part of the study.

The second part of the POS Scoreboard is drawn from a survey of point-of-sale system users. More than 350 users answered nine questions evaluating their POS systems on a scale of 1 to 10 (for more on the questions, see page 7). Each question was worth a maximum of five points, for a total of 45 points.

Taken together the user responses and the company survey offer a balanced view of POS software companies. POS companies could receive a maximum of 100 points. The top ten POS companies all displayed broad functionality to serve the

Continued on page 6

Company	POS Functionality	Company Total	User Satisfaction	Total Score
1 MICROS Systems	39	54	30.1	84.1
2 Aloha by Radiant Systems	37	52	30.2	82.2
3 Maitre'D by Posera	34	44	36.7	80.7
4 Positouch	36	48	31.5	79.5
5 ParTech	27	42	32.9	74.9
6 Restaurant Managers by ASI	30	38	35.9	73.9
7 Volante Systems	32	37	36.1	73.1
8 InfoGenesis	27	37	32.5	69.5
9 Squirrel Systems	28	40	29.5	69.5
10 PC America	25	33	36.0	69.0

Top 10

Continued from page 4

foodservice industry and high customer satisfaction. POS companies that had high customer satisfaction, but narrowly targeted solutions, or broad solutions but poor customer satisfaction did not fair as well in the POS Scoreboard.

It should come as no surprise to anyone in the industry that MICROS Systems, Radiant Systems and Positouch all finished at the top of the Scoreboard. Not only do these companies have a large installation base and high company revenue—factors that certainly helped their scores—but more importantly, they finished in first, second and third place for POS functionality. Having a diverse array of customers to support, Micros, Radiant and Positouch offer the broadest range of point-of-sale functionality in the industry. Bolstered by strong User Satisfaction scores, these three companies exhibited a comprehensive approach to providing technology to the foodservice industry.

The other companies in the POS Scoreboard Top 10 took a different route. Maitre'D by Posera, ParTech, Restaurant Manager by ASI, Volante Systems, InfoGenesis, Squirrel Systems and PC America have all developed more specialized products. Each of these POS solutions still offers a range of POS functionality, but tend to be more focused on specific segments of the industry. The focus of many of these companies is evident in the Industry Breakdown section (p. 11). Not surprisingly these companies received the highest User Satisfaction scores as well.

Top POS Systems

The strength of a point-of-sale company is built upon the power of the systems they sell. Nearly all the POS vendors sell multiple versions of POS software, ranging from high-end solutions to others designed for the budget conscious. While there is no single solution that works for every restaurant or foodservice operation, some systems clearly represent the cream of the crop.

Survey respondents identified and rated 162 distinct POS software solutions. Many of these systems rated



quite well, but only received a few votes. The Micros 3700, Aloha 5.2 by Radiant Systems and Positouch 5.2 POS systems all received at least 10 votes, which is more than enough to make the results statistically significant.

MICROS Systems 3700

Based on the results of the POS Scoreboard Survey, the Micros 3700's strong suit is its overall performance. Only one of the seventeen respondents gave the Micros 3700 POS system a score

lower than 8 (it was a 7) for overall performance. In addition, the Micros 3700 rated nearly as well for its return on investment, total cost of ownership and ease of installation.

The respondents represented quick service, fast casual, table service, hotels and casinos, although the bulk of the respondents were table-service restaurants. The flexibility of the Micros 3700 is also evident in the eleven 10s the system received in the voting, with at least one for each criteria.

Aloha by Radiant Systems Version 5.2

The second most popular system in the POS Scoreboard is the Aloha 5.2 POS by Radiant Systems. Of course, if you go to the Aloha website, you will be hard pressed to find Aloha 5.2 anywhere. So what is the solution the respondents like so much? Aloha TableService, which received high marks for its ease of installation, low total cost of ownership and strong return on investment. Although called a TableService solution, one-third of the respondents were quick-service restaurants.

Positouch Table Service

All but four of the respondents evaluating Positouch use Positouch Table Service solution version 5.2. The system received the highest rating of the three systems for Return on Investment, but also scored well for overall performance and ease of upgrade. In fact Positouch Table Service received an impressive 14 scores of 10 and two for sales and support. ■

User Satisfaction

The "User Satisfaction" ratings are a central element to the POS Scoreboard. As a publication, *Hospitality Technology* has always believed that the most valuable opinion on any technology is that of its users. The User Satisfaction scores provide a new way for foodservice operators to communicate what they like (and don't like) about their POS systems. That the respondents include a Fortune 500 company VP as well as small franchisee owners reflects the Scoreboard's broad appeal.

Survey respondents were asked to evaluate their POS system on nine distinct criteria on a scale from one to 10 (one being the lowest and ten reflecting a perfect system). The nine criteria were Overall Performance, Total Cost of Ownership, Return on Investment, Strategic Value, Ease of Installation, Ease of Integration, Ease of Administration and Quality of Support and Service.

The scores of each company were taken and averaged so that each company had an equal opportunity to succeed. To provide balance to the scores, companies that received the most votes were awarded additional points. A company receiving more than 10 votes received one bonus point, up to five points for more than 50 responses.

In the further interest of fairness, we decided to breakdown the results in two categories, companies with 20,000 or more installed terminals and those with fewer than 20,000 installed terminals. To be fair

to companies with large-scale installs, we counted the number of actual terminals are not the number of installed locations. Nearly all the companies agreed that the division was the fairest way to compare companies of varying scale. Of all the companies in the POS Scoreboard, only PC America had a single solution for both foodservice and retail POS. We placed PC America in the "fewer than 20,000 installed terminals" category because although PC America has more than 20,000 total installed terminals, it is unclear how many are foodservice-specific.

Three hundred twenty-three respondents completely filled out the survey representing quick-service restaurants, table-service restaurants, hotels and casinos. Interestingly the ratings were quite positive. While one would expect an average score to be five on a scale from one to ten, the average scores for each question was much higher, ranging from 7.1 for integration to 7.7 for overall performance.

“Twenty percent gave their POS company a 10 for overall performance.”

Overall performance

It should come as no surprise that when survey respondents were asked, "Which single criteria is most important in deciding on a POS system?", overall performance was the run-away winner. Half of the respondents indicated that they look at the overall performance as the most important criteria.

Of equal importance is the high-level of satisfaction with foodservice POS systems' overall performance. Among the top 10 companies, scores

Overall Performance

20,000 OR MORE INSTALLED TERMINALS

1. Maitre'D by Posera
2. InfoGenesis
3. ParTech
4. Positouch
5. MICROS Systems

FEWER THAN 20,000 TERMINALS

1. Restaurant Manager by ASI
2. PC America
3. In-house/proprietary
4. Volante Systems
5. HSI

User Satisfaction

Total Cost of Ownership

20,000 OR MORE INSTALLED TERMINALS

1. Maitre'D by Posera
2. ParTech
3. InfoGenesis
3. Positouch
4. Panasonic

FEWER THAN 20,000 TERMINALS

1. PC America
2. Restaurant Manager by ASI
3. Volante Systems
4. In-house/proprietary
5. HSI

Return on Investment

20,000 OR MORE INSTALLED TERMINALS

1. Maitre'D by Posera
2. Positouch
3. ParTech
4. InfoGenesis
5. Squirrel Systems

FEWER THAN 20,000 TERMINALS

1. PC America
2. Restaurant Manager by ASI
3. Volante Systems
4. In-house/proprietary
5. HSI

ranged from a strong 7.6 to a truly impressive 9.4. The average score for all the companies was 7.7, which was the highest among all the categories. Twenty percent of the respondents gave their POS company a score of 10, and 63% of the respondents gave a score of eight or higher.

Total cost of ownership

The ranking for Total Cost of Ownership (TCO) are very similar to those for Overall Performance, which is probably the result of an increasing close examination of the costs associated with POS across the system's entire life. Hospitality IT executives are paying far more attention to TCO measures now than in previous years.

Interestingly, while proprietary systems ranked very well in overall performance, these in-house systems dropped from third to fourth in terms of TCO. This may reflect inherent costs associated with

continuing to support in-house systems. The responses of Panasonic users, although the company just missed the top 10, indicate that its POS systems excels particularly at TCO.

Return on investment

Increasingly, return on investment has become a mantra for the foodservice industry. When investing in technology, IT executives need to determine a specific timetable for achieving a return on investment. The fact that 22% of the respondents rated their POS a 10 out of 10 for ROI, is perhaps the clearest indication of just how essential a strong POS system has become.

The scores for the top 10 companies ranged from 7.5 to 9.3 and both Maitre'D by Posera and PC America achieved average scores above 9.0. Squirrel Systems users indicated that ROI was Squirrel's strongest attribute with an average score of 8.0.

Ease of integration

Perhaps the biggest challenge for any POS implementation is integration with other key systems. The POS has become the heart of any restaurant or foodservice operation, and the ease of integration directly correlates to the company's ability to work efficiently and smoothly. This issue is even more difficult and critical for hotels and casinos and other foodservice operations that are embedded in larger enterprises and as a result the companies that cater to those markets—HIS, Micros, InfoGenesis, Spring-Miller Radiant Systems—are most likely being judged even more rigorously.

Given the challenges, it should come as little surprise that the overall average score (7.1) are lower in this category, then the others. Only one company, Volante Systems, had an average score above 9.0.

Support and service

The quality of support and service ranked second among respondents in terms of importance, with

12% indicating it is the most important criteria for selecting a POS system. While it is often a point of frustration for users, it rang in at a very solid 7.4. Interestingly, 23% of respondents gave their POS vendor a 10 in this category and 57% gave their POS company a score of 8 or higher for support and service. While we expected to see quite a few disgruntled respondents in this category, that clearly was not the case.

A strong showing by Micros indicates that even with an enormous support network across it is still possible to provide quality service. Equally strong showings by ParTech and Positouch also indicate that bigger companies can still deliver quality service.

In addition to these five categories, POS vendors were also evaluated in terms of the strategic value, upgradability, ease of installation and ease of administration and maintenance. Fewer than 15% of the respondents indicated that these four remaining criteria were the most important in deciding on a POS system. These categories were nevertheless still used as part of the overall POS Scoreboard results. ■

Ease of Integration

20,000 OR MORE INSTALLED TERMINALS

1. Maitre'D by Posera
2. ParTech
3. InfoGenesis
4. Radiant Systems
5. Squirrel Systems

FEWER THAN 20,000 TERMINALS

1. Volante Systems
2. Restaurant Manager by ASI
3. PC America
4. In-house/proprietary
5. Progressive

Sales and Support

20,000 OR MORE INSTALLED TERMINALS

1. Maitre'D by Posera
2. ParTech
3. InfoGenesis
4. Positouch
5. Radiant Systems

FEWER THAN 20,000 TERMINALS

1. Volante Systems
2. Restaurant Manager by ASI
3. PC America
3. In-house/proprietary
4. Springer-Miller

Industry Breakdown

The foodservice industry is a big place with a highly diversified range of operations. The needs of a casino with high volume QSR, fine dining and bar establishments all integrated under one roof differ dramatically from those of a neighborhood pizzeria. As one VP at a major restaurant chain insisted, "I am not sure a general POS survey for POS in the food service industry is that useful. You should at least break the survey down between QSR and full-service restaurants." Well that's exactly what we did.

In the survey, respondents were asked to identify their foodservice operation. Table-service restaurants represented 39% of the respondents, followed by QSRs (26%), Hotels, Resorts and Spas (25%) and Casinos (4%). Another 6% selected other and wrote in answers ranging from bars to pizzerias to a zoo.

One of the biggest surprises in the POS Scoreboard was the large number of responses from hotel operators. Since many hotel management companies use more than one POS system, the selection of a POS system becomes an especially important one. On more than one occasion, hotel IT executives contacted *Hospitality Technology* to evaluate all their POS systems, one at a time.

The Industry Breakdown scores were developed by taking all the responses for each industry segment and looking at the composite User Satisfaction scores. So for example ParTech ranks number one in QSR because it had the highest composite average of all nine User Satisfaction questions from respondents that indicated they represented a quick-service restaurant. In some cases POS vendors are not on the list because they did not have the minimum number of votes for the segment.

Quick Service

POS solutions for quick-service restaurants have made tremendous progress in recent years. And QSR represents an increasingly competitive market. Clearly in this market a large footprint is extremely important. Only one company made the list with fewer than 20,000 installs, although as has been previously stated, PC America has a large install base when retail locations are factored in. Among the four companies with more than 20,000 installed foodservice terminals, all four are well known solutions.

Table Service

Given the longer history and near universal coverage of POS systems in the multi-unit table-service restaurant category, it comes as no surprise that the largest number of survey respondents represented table-service restaurants. Maitre'D by Posera topped the list with a astounding high score of

9.5. Among the smaller companies, both Volante Systems and Restaurant Manager by ASI also topped 9.0.

Hotel and Casino

The only companies to excel among POS vendors with fewer than 20,000 installations are HSI and Springer-Miller—two companies with well established records in the industry. All of the POS companies with more than 20,000 installed terminals have long-standing relationships in the industry. In the case of Springer-Miller, their foodservice POS is primarily designed to add more functionality to their PMS.

Springer-Miller's popularity—and that of InfoGenesis and MICROS Systems—reflects the growing importance of integration among the issues that concern lodging IT leaders. That all three companies are involved in Hotel Technology Next Generation (HTNG), an organization focused on improving systems integration for the industry is no accident.

Those patterns are even more pronounced in the casino industry. Issues of integration are critical in large scale casino operations and the fact that there are only two (fierce) competitors in the segment is more a reflection of the importance of size, scalability, integration and market presence than the relatively small number of responses.

Segment Leaders: 20,000 or more total installed terminals	Segment Leaders: Fewer than 20,000 total installed
<ul style="list-style-type: none"> ■ QSR ParTech Panasonic Radiant Systems MICROS Systems ■ Table Service Maitre'D by Posera Positouch Radiant Systems MICROS Systems Squirrel Systems ■ Hotel POS InfoGenesis Micros System Radiant Systems ■ Casino InfoGenesis MICROS Systems 	<ul style="list-style-type: none"> ■ QSR PC America ■ Table Service Volante Systems Restaurant Manager by ASI PC America HSI ■ Hotel HSI Springer-Miller Systems

Top Performers

Hospitality Technology thanks InfoGenesis, Maitre'D by Posera and Micros Systems for their support of the 2004 POS Scoreboard. Without their recognition of the importance of listening to POS users, this study would not have been possible. It is little wonder that these companies are the industry standard against which all their competitors are measured.

InfoGenesis

It is little wonder that InfoGenesis manages to retain more than 97% of its customers. Not only was InfoGenesis the number one POS solution for hotels and for casinos, but it also ranked highly in Overall Performance (No. 2) and Quality of Support and Service (No. 3).

InfoGenesis develops point-of-sale (POS) solutions exclusively for the hospitality and foodservice industries. Its managed POS solutions include software, hardware, installation, training and consulting, and customer support.

The InfoGenesis POS solution is designed specifically for table service restaurants, hotels, resorts, casinos, cruise ships, and institutional foodservice. The quality of the InfoGenesis solution is acknowledged, not only by its performance in the POS Scoreboard, but also by the list of prominent customers who use it, including the Westin Diplomat Resort in Hollywood, Florida; major cruise lines like Royal Caribbean Cruise Line; and the world's largest casinos, like MGM Mirage and Mandalay Bay Resort & Casino. The InfoGenesis POS solution includes back-office management tools for stand-alone properties or enterprises of multiple sites, as well as flexible and intuitive touch screen terminal solutions.

Founded in 1986, InfoGenesis is a privately held company based in Santa Barbara, California. InfoGenesis revenues have grown by a compounded average of 40% throughout its 18-year history. For more information on InfoGenesis, visit www.infogenesis.com or call 805.681.8600.

MICROS Systems

Not only is MICROS Systems the No.1 company in the 2004 POS Scoreboard, but it is a leading developer of enterprise applications serving the hospitality and retail industries exclusively. Micros is a \$400 million publicly-traded company serving table service and quick-service restaurants, hotels, the leisure and entertainment industry, and specialty retail stores, with complete information management solutions including software, hardware, enterprise systems integration, consulting and support. Micros' global network consists of over 3,000 employees, 43 subsidiaries in major markets and 93 distributors in 40 countries.

Micros has more than 150,000 installations worldwide and is the only full systems solutions provider for all segments with a global distribution and service network in place for major chains, regional chains, local independents, table service, and the quick service market. Micros provides solutions that combine unified access point-of-sale, back-office, and corporate-office applications.

For large enterprises Micros provides a scaleable solution to manage the very large and very complex operational requirements associated with hotels, casinos, airports, theme parks, stadiums and cruise lines. Clients includes HMS Host, Ruby Tuesday's, Whitbread, the Atlantis Resort & Casino, and Reliant Stadium, to name a few, including the largest POS installation in the world at Stadium Australia in Sydney, Australia.

Through its global markets subsidiary, Micros-Fidelio International, Micros also is a premier provider of enterprise-wide integrated information technologies for the hotel industry, with over 15,000 installations worldwide. For more information on Micros, visit www.micros.com or call 800.638.0985.

Maitre'D By Posera

Focusing on its customers has always been a priority for Posera with its suite of Maitre'D POS products. And as the 2004 POS Scoreboard indicates, that attention to customers has paid off. Maitre'D had the highest overall User Satisfaction rating and was No.1 in Overall Performance, Return on Investment, Total Cost of Ownership, Ease of Integration and Quality of Support and Service among the POS vendors with more than 20,000 POS terminals installed.

One of Posera's priorities is research and development, and therefore continuously enhancing their solutions and taking the right directions in R&D in order to best meet the industry's rising needs. Posera always explores and evaluates emerging technologies to discover the best ways to meet these needs.

Posera's mission is to develop quality software solutions for the hospitality industry and to help its customers keep up in a fiercely competitive industry. Posera maintains a corporate office in Montreal, Canada, with a sales office in Seattle, Washington and a newly opened European office. Posera currently has approximately 200 active resellers worldwide.

For more information on Maitre'D by Posera visit www.maitredpos.com, write: 2020 University, Suite 1900, Montreal, QC, H3A 2A5, Canada, or call 514.499.1312 (phone), 888.404.2662 (toll free) or 514.499.9951 (fax).