

Who Has Led the Conversation In the Restaurant POS Software Industry?

An analysis of recent marketing activity across five leading brands





In recent years, point of sale (POS) systems have become a key differentiator for restaurants across the globe. These systems allow restaurateurs to meet many practical needs such as growing profits, running more efficient and organized businesses, and improving bookkeeping.

With the rise of COVID-19 over the past 18 months, the closure of many restaurants, and the growth of the online ordering and delivery market, marketing teams for restaurant POS software companies have had their hands full. Not only have they had to pivot their positioning and messaging, but they've had to appeal to restaurants in new ways.

The following report will provide you with a glimpse into how restaurant POS software companies have navigated the past year and kept the conversation going—despite the hardships the industry has faced. We will examine the efforts of five key industry leaders:

- Toast
- Revel Systems
- Square
- TouchBistro
- Upserve (formerly known as Breadcrumb)

The insights delivered in this report were captured by Crayon's competitive intelligence software platform between August 1, 2020 and July 31, 2021.



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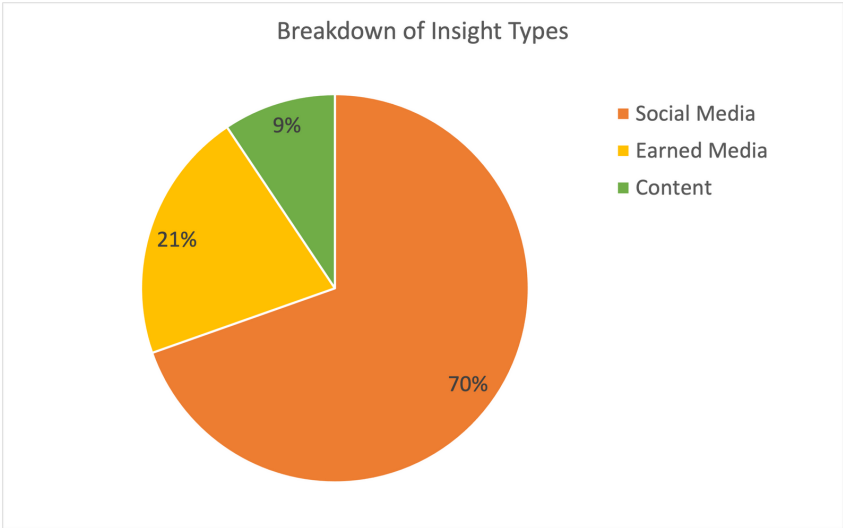
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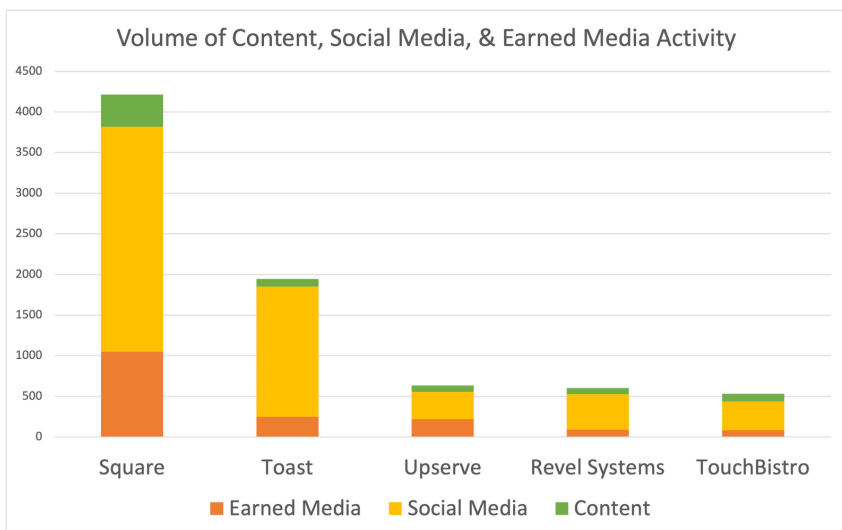


Throughout this report, we will highlight insights captured over the past year for three main categories: content, social media, and earned media. For a broader picture of our insights, we've created 3 charts to summarize the key findings. First, let's take a look at a breakdown of insight types.

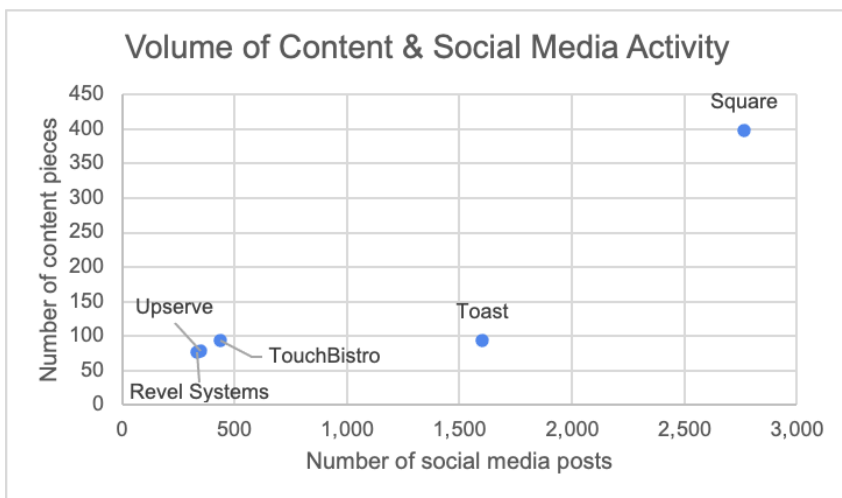


When looking at the volume of activity put forth by these five POS software competitors, the ranking is as follows: [Square](#) (4,216), [Toast](#) (1,944), [Upserve](#) (636), [Revel Systems](#) (603), and [TouchBistro](#) (531).

Intro: General findings (cont.)



Next, if we focus specifically on content and social media activity, there is a clear standout leader: Square.





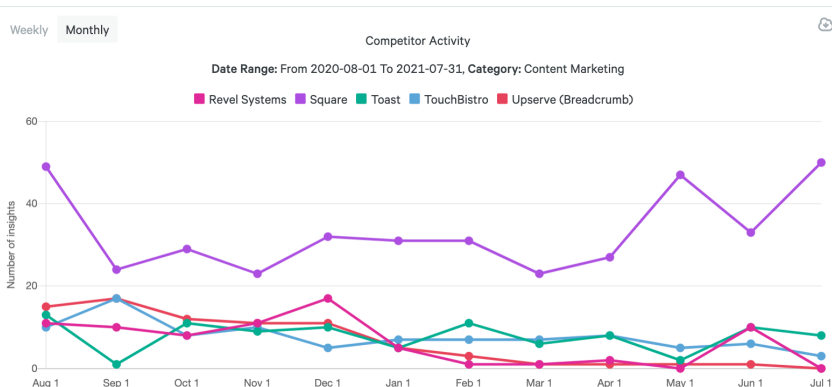
When it comes to content marketing in the restaurant POS technology space, companies have been busy, focusing their efforts on two main things: blog posts and YouTube videos. Over the past year, Crayon has captured 740 pieces of content—500 of them falling under blog posts and 148 under YouTube videos. Before diving into these two categories, in particular, let's explore the industry's overall content marketing efforts and the language most frequently used in this space.

Overall Activity

Square is leading the pack in content production while the other companies sit on a more even playing field. This is likely because they are a public company with over 7,000 employees and \$601.2 million in funding. It's also important to note that they don't solely advertise their POS system to restaurants; they also target other business types such as retail and professional services, allowing for a wider variety of content.

To give you some perspective, Upserve, the smallest company we're analyzing in this report, is a private organization focused solely on POS for restaurants. They have less than 120 employees and only \$40.5 million in funding. With funding and employee headcount on Square's side, it comes as no surprise that they are the front runner.

To compete with Square's activity levels, the other industry leaders need to more than double their production and may need to adjust their overall content marketing strategies to keep up. Below is a comparison of activity levels to give you a sense of how these companies stack up: [Square](#) (399), [Toast](#) (94), [TouchBistro](#) (93), [Upserve](#) (78), [Revel Systems](#) (76).



Language Used

Now that you have an idea of where these companies stand in regards to activity, let's explore the language used by these companies in their content marketing efforts. As you'll see in various sections throughout this report, Crayon's Insight Word Cloud showcases the 50 most popular terms used over a period of time. For reference, a given term's font size correlates with its level of popularity and usage.

Three words immediately pop out when looking at the content marketing cloud: **business** (279 mentions), **restaurant** (248), and **square** (175). Some other notable terms include **help** (161), **customers** (156), and **online** (111).

When looking at the top terms, they correlate perfectly with the subject matter produced. The majority of the videos and blogs revolved around helping potential customers understand how their systems work, tips for effective restaurant management, and promoting the in-person and online offerings for these systems—a critical combination over the past year.

Date Range: From 2020-08-01 To 2021-07-31. Category: Content Marketing





Blog Posts vs. YouTube Videos

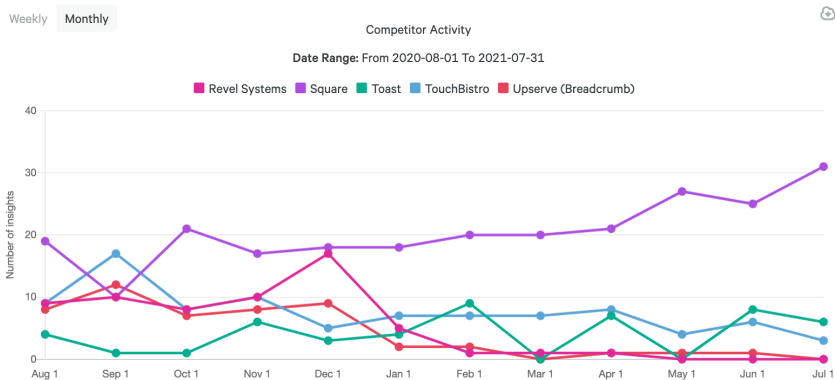
As mentioned previously, blog posts (500) and YouTube videos (148) are the most commonly used forms of content marketing in the restaurant POS space. In 2020, the conversation geared towards topics such as the importance of mobile payment systems, but much of the discussion shifted back to “business as usual” once 2021 began.

Despite the restaurant industry being hit exceptionally hard by COVID-19, the pandemic was only referenced in 32 blog posts and 8 YouTube videos throughout the year. In fact, Toast did not mention the pandemic at all and Upserve only did once in their blogs and YouTube videos. While companies were quick to promote the benefits of their mobile and online offerings (certainly an advantageous feature during COVID-19), there was a conscious effort to avoid explicitly discussing the pandemic.

Now that you have a grasp on what was—or in the above case, was not—discussed in these companies' content marketing efforts, let's look at the frequency of blogs being produced and then examine YouTube videos.

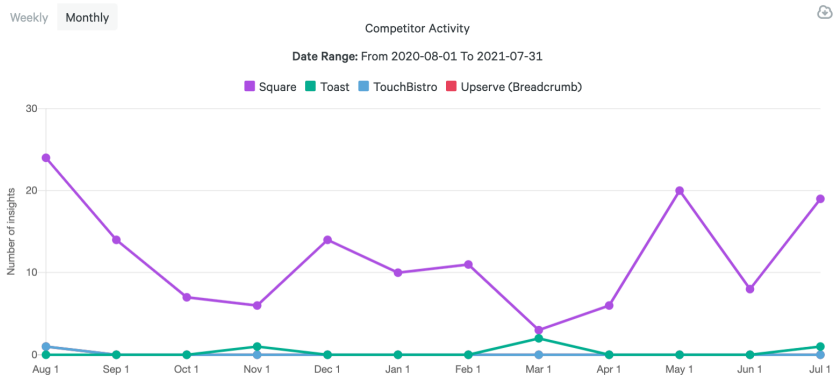
All five organizations created blog posts over the past year. Square is the clear leader in blog creation, accounting for nearly half of all pieces produced. This is likely due to Square's content marketing team being much more sizable than its rivals'.

Here are some specific numbers to give you a better sense of each company's standing: [Square](#) (247 posts), [TouchBistro](#) (91), [Revel Systems](#) (62), [Upserve](#) (51), [Toast](#) (49).



Now focusing on YouTube videos, you can see that not all companies are included in the graph. That means that one key industry player has not utilized YouTube at all—in this case, Revel Systems. And once again, Square takes the lead with 131 more videos than the runner-up, Toast.

For context, Square's YouTube page has over 14 million views and frequently adds new step-by-step content. Toast, on the other hand, has under a million views. Videos are rare, and most are customer spotlights.



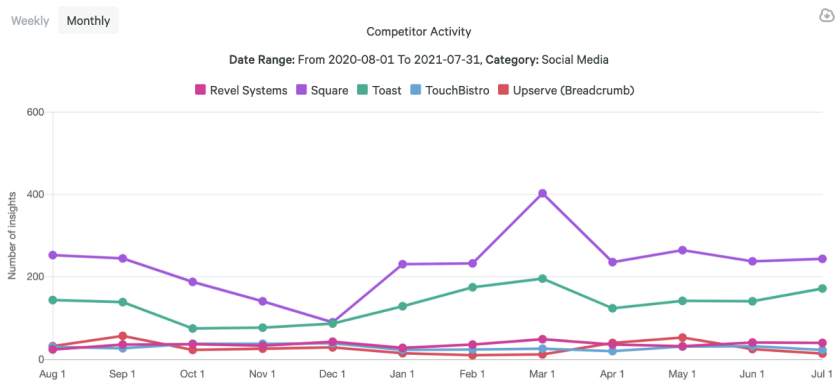


Given the widespread usage of social media amongst B2B companies, it's important to shed light on how restaurant POS businesses are utilizing it. Our platform captured 5,490 social media insights over the past year centered around these five companies. Unsurprisingly, the top platforms for these companies are Twitter (3,703) and Facebook (1,233). The following section will take a look at overall social media activity, language used, and analyze both Twitter and Facebook.

Overall Activity

As you can see, Square is in the lead and Toast is following behind them. Square regularly uses its platforms as a tool for customer service resolution, whereas Toast utilizes it to promote content and success stories. Regardless of the numbers, it is clear that all five companies do see the value in social media and have had a presence over the past year.

Here are the specific social media activity level stats: [Square](#) (2,767), [Toast](#) (1,601), [Revel Systems](#) (435), [TouchBistro](#) (351), [Upserve](#) (336).





Language Used

The words used across social media platforms over the past year aren't far off from the terms used for content marketing efforts. In fact, some top terms with crossover include business, restaurant, square, and help.

Identifying terms from Crayon's 5,490 insights, the most popular ones used are restaurant and business. Some additional noteworthy terms are [help](#), [square](#), and [look](#), and in this case, [covid](#) made it into the Word Cloud, but it was, once again, not a top-trending word.

While [Square](#) was a top term, note that [Toast](#) and [Revel](#) were included in the Word Cloud as well. This proves that they do have an impactful social media presence despite their activity levels being lower.

On top of that, [Toasttab](#) was a trending term. Not only is [Toasttab](#) the account name for Toast's Twitter and Facebook, but it is also included in the their website URL. Clearly, Toast is a conversation leader with a strong social media strategy—even though Square outperforms them in the volume of posts.

Analyzing the top terms mentioned previously, the specific number of mentions are as follows: [restaurant](#) (1,510), [square](#) (1,393), [business](#) (672), [help](#) (648), [look](#) (582).

As predicted, [business](#) and [restaurant](#) triumphed, and kudos to [Square](#) for making it into the top three of most popular terms—that goes to show that having high activity can make a noticeable impact.



Insight Word Cloud

50 of the most popular terms across 5,490 insights

Date Range: From 2020-08-01 To 2021-07-31, Category: Social Media



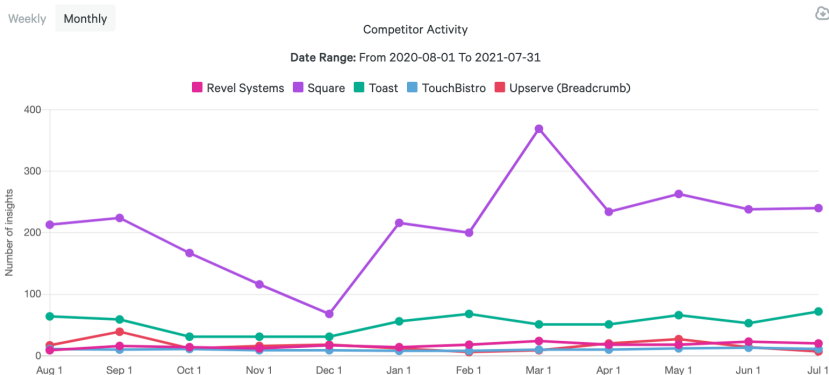
Twitter vs. Facebook

When it comes to Twitter, Square is leading the industry conversation and engaging with customers on a much more consistent basis. Square has tweeted around 15,000 times in its company's history and the runner-ups, Toast and Revel Systems, have tweeted around 10,000 times—they're closing the gap but Square still triumphs overall.

Now, let's examine the volume of posts specifically over the past year:

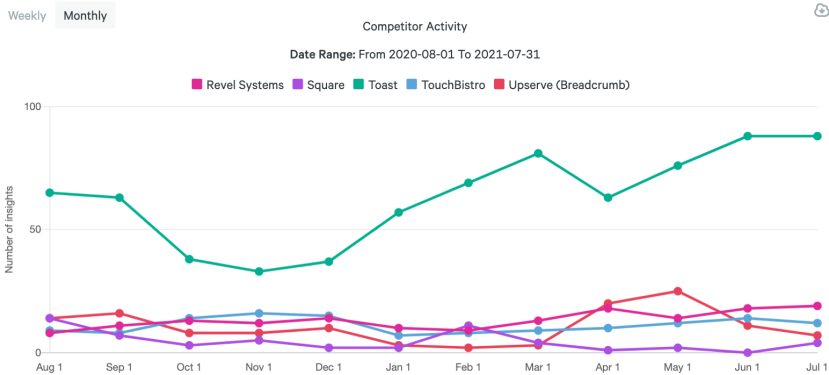
Square (2,548), Toast (633), Revel Systems (203), Upserve (197), TouchBistro (122).

Social media insights (cont.)



Shifting our focus to Facebook, the top activity goes to Toast. Many of their posts include quotes, screenshots of positive reviews, and customer spotlights. And, in this case, Square did not take the lead. In fact, they came in last. Clearly, they put their marketing efforts elsewhere. Perhaps their non-restaurant targets do not use Facebook as often.

For context, here are the numbers: Toast (758), Revel (159), TouchBistro (134), Upserve (127), Square (55).



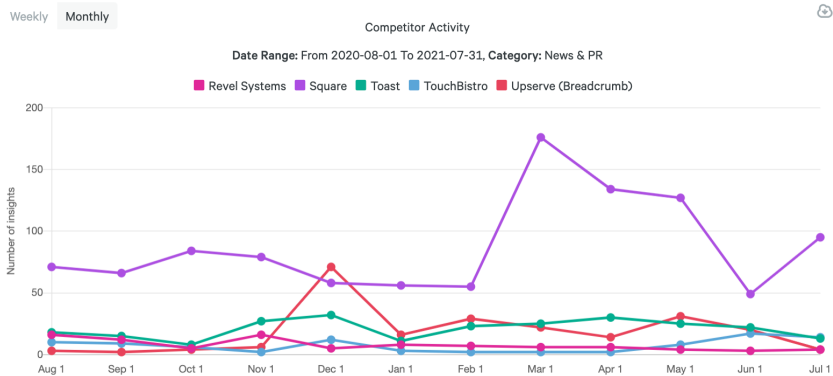


When examining an industry, it's important to note what is being said about its key players. Whether it's an interview with a new CEO or a press release discussing a new feature, all earned media must be taken into account when looking at a company's messaging and positioning.

Overall Activity

Over the past year, our platform tracked 1,658 news mentions. These include all awards, news, and press release mentions.

As you can see below, Square consistently ranked at the top while Upserve had a spike in December. Square gained tremendous PR traction due to its multimillion-dollar investment in Bitcoin and commitment to reach net-zero carbon emissions by 2030. Upserve's spike was due to its acquisition by Lightspeed, and the runner-up, Toast, shared announcements about new leadership hires and a sizable donation to a restaurant relief plan. Here are the numbers: [Square](#) (1,050), [Toast](#) (249), [Upserve](#) (222), [Revel](#) (92), [TouchBistro](#) (87).



Language Used

The Insight Word Cloud below represents the most common terms associated with these companies when it comes to earned media. Let's explore which terms were used most frequently.

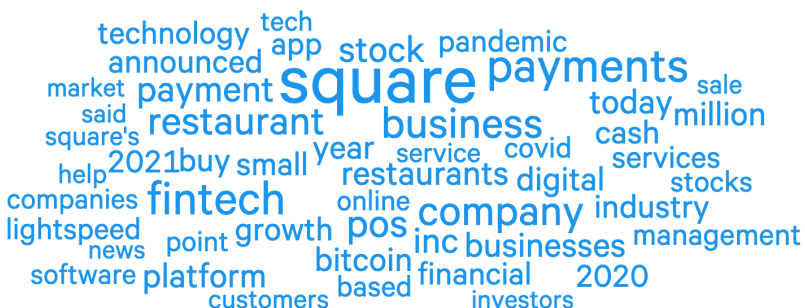
Quite the feat by Square, their company name is the most popular term (654 mentions). Other noteworthy mentions include [payments](#) (406), [business](#) (378), [company](#) (305), and [restaurant](#) (256).

Business and **restaurant** are, once again, top terms, while **payments** and **company** are new additions. **Square** ranking first overall for earned media mentions proves that not only is their marketing strategy working and the press wants to cover them, but potential customers are more likely to hear (or read) about them over any of the other rivals.

Insight Word Cloud

50 of the most popular terms across 1,658 insights

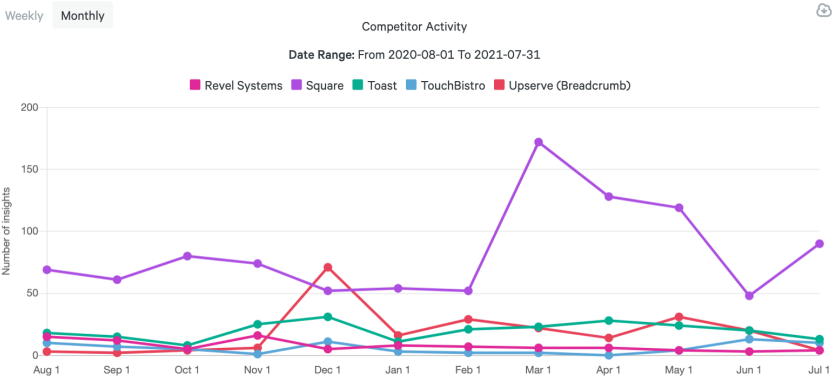
Date Range: From 2020-08-01 To 2021-07-31, Category: News & PR





News Mention vs. Press Release

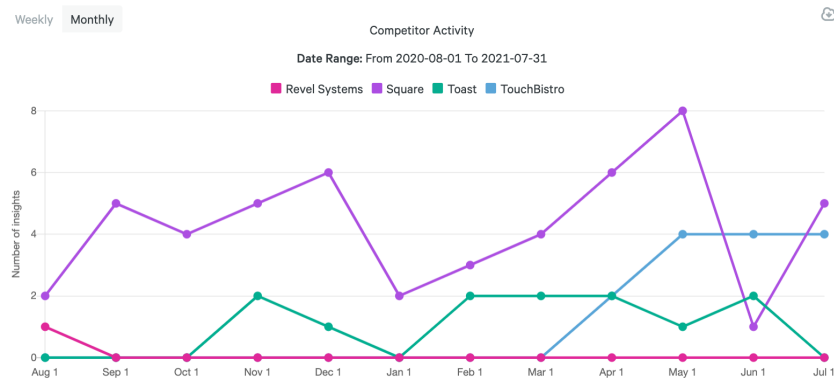
Similar to the overall activity graph, news mentions were particularly strong for Square compared to the other organizations—in part due to the company's consistent publishing of press releases. Also, many of the articles revolved around stock growth for Square and mobile payments, including examples such as Google Pay and in this case, Square. Square's broad customer base and public standing helped seal the deal for media mentions. Here are the numbers: [Square](#) (999), [Toast](#) (237), [Upserve](#) (222), [Revel](#) (91), [TouchBistro](#) (68).



For press releases, the graph looks a bit different than what we've seen thus far. From a glance, you can see that Upserve was not included at all—meaning they have not put forth any new releases this year.



Square prevailed and TouchBistro pushed out some releases during the March to July date range, such as a piece highlighting that they increased sales for a customer by 31%. They are taking the right steps towards getting involved in the conversation! Check out the frequency of releases: [Square \(51\)](#), [TouchBistro \(14\)](#), [Toast \(12\)](#), [Revel \(1\)](#), [Upserve \(0\)](#).

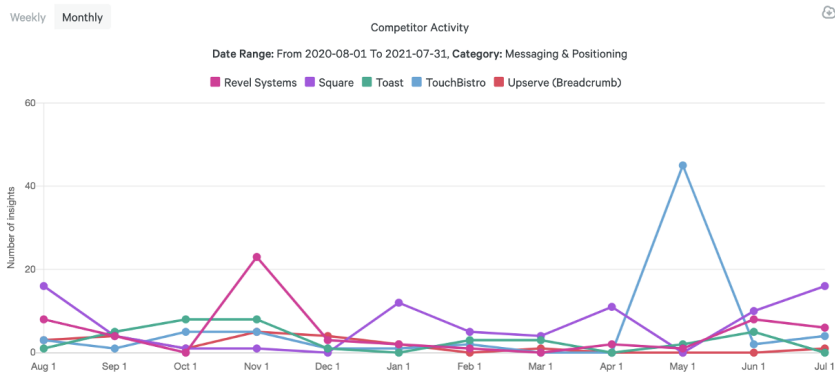




Thus far, this report has examined who is leading the POS software conversation, where it's happening, the frequency of it, and what terms are most commonly used. For this next section, we will dig even deeper, providing some specific examples of changes these companies have made to shift or lead the conversation. In total, our platform discovered 264 major changes this past year.

Overall Activity

Looking at this activity graph, it is clear that from April to June, TouchBistro made some changes to its positioning. In fact, the company revamped the copy and/or design on nearly every page on its site. Revel made some noticeable adjustments to its web page look and messaging in November as well. To no surprise, messaging and copy updates (89) and page design updates (121) saw the most results of all categories. Check out our real-life examples below to gain some insight.



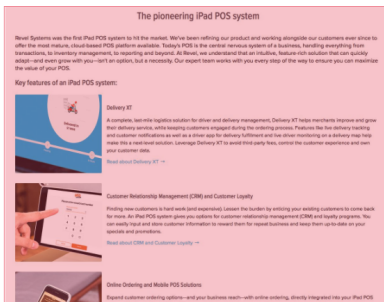


Revel & TouchBistro Examples

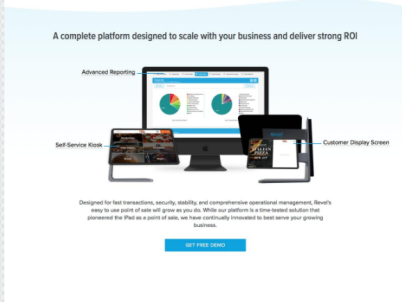
As highlighted previously, back in November 2020, Revel made some major changes to its website, including its homepage. The company opted for more imagery and fewer words. For Revel's competitors, this could be telling that this homepage wasn't providing as many leads as they'd hoped or that readers weren't staying on that page as long as they had anticipated. Because of the dramatic changes to the page, it's clear that the company felt that a fresh look and experience was necessary.



Trusted and loved by over 20,000+ businesses globally:



Trusted and loved by over 20,000+ businesses globally:



Messaging & copy insights (cont.)



Looking at the second example, TouchBistro completely revamped their restaurant gift card [page](#). Not only did they update the format of it, but they added more graphics, bullet points, a customer testimonial, a quote and demo button, and more—the list goes on and on! They also removed a large portion of the text under the main title. That change was most likely because the page is relatively self-explanatory.

TouchBistro PRODUCTS FEATURES POS SOLUTIONS PRICING CUSTOMERS MORE

RESTAURANTS TO CONSIDER (2019) 100 TouchBistro Restaurant Owners' Favorites

Customized Gift Cards for Restaurants

Looking for an easier way to create branded gift cards for your restaurant?

Introducing TouchBistro Gift Cards, an easy-to-use solution that enables you to design and sell physical and digital gift cards for your restaurant.

Gift cards help build awareness of your restaurant while also driving immediate cash flow and giving customers an incentive to come back sooner. TouchBistro is proud to offer a gift card program that lets you create and manage your own gift cards. We give you the flexibility to purchase gift cards in-store through your TouchBistro POS, or from anywhere else with your very own Customer Web App.

[Learn More](#)

How Gift Cards Can Help You

Here are just some of the ways gift cards can help you grow your business:

- 1 Increase Sales**
Make guaranteed sales when you market gift cards for holidays or special occasions. Increase immediate cash flow and secure future sales.
- 2 Deliver a Great Guest Experience**
Gift cards can be used at any of your locations with multi-location reactivation. Plus, when guests have one or more digital gift cards on their Customer Web App, they can pay with a quick scan of their phone!
- 3 Save Time and Money**
Track gift card purchases and redemptions and use that information to make more informed business decisions. Easily migrate physical gift cards from your current provider with no downtime.

Add Gift Cards to your restaurant today!

[Get Started](#)

Category	POS Solutions	Features	Partners
Restaurant Tableside Ordering System	Full Service Restaurant POS	Pricing	Integration Partners
Restaurant Table Management	Cashier Service	Payment Solutions	Become an Affiliates
Restaurant Online Order Management	Bar & Nightclubs	Online Ordering	
Menu Management & Scheduling	Food Truck	Mobile Self-Ordering for Quick Service	
Restaurant CRM Software	Delivery	Mobile Payments	
Restaurant Inventory Management		Gift Cards	

TouchBistro Products Restaurant Types Pricing Resources Company [BOOK A DEMO](#)

Custom Restaurant Gift Cards from TouchBistro

Drive immediate cash flow and repeat business with physical and digital gift cards for your restaurant.

[GET A QUOTE](#) [BOOK DEMO](#)

See Why Customers Love TouchBistro Gift Cards

- Give the Gift of Convenience with Digital Gift Cards**
Digital gift cards make it easy for guests to access and redeem gift cards from their smartphones.
- Drive Gift Card Sales with Online Purchasing**
Online gift certificates for your restaurant make it as easy as possible for guests to buy and send gift cards to friends and family.
- Streamline Operations with POS Integration**
TouchBistro Gift Cards integrate with our POS, unlocking powerful reporting and end-of-year reconciliation support.
- Increase Your Reach with Multi-Location Support**
Does your restaurant have multiple locations? Give guests the freedom to use gift cards to pay for meals at their most convenient locations.
- Show Off Your Brand with Customization Options**
Personalize physical gift cards with your restaurant's logo for a consistent and memorable brand experience.
- Amplify Marketing Efforts with Gift Cards**
Make gift cards a key part of your business's marketing efforts by customizing them with designs for special occasions, like birthdays and holidays.

[BOOK DEMO](#) [SEE PRICING](#)

"Our servers are so excited about TouchBistro Gift Cards. It's way easier for them to acquire and then activate everything in manually. It's also back come time that they can send instructions with..."



Square is indisputably the conversation leader in the restaurant POS software industry. Square was victorious in nearly every single category analyzed. To sum it up, the unwon categories include the volume of Facebook posts and the frequency of messaging and copy changes. An easy assumption to make is that they did not make many messaging and copy changes because no alterations were needed—in other words, don't fix what's not broken!

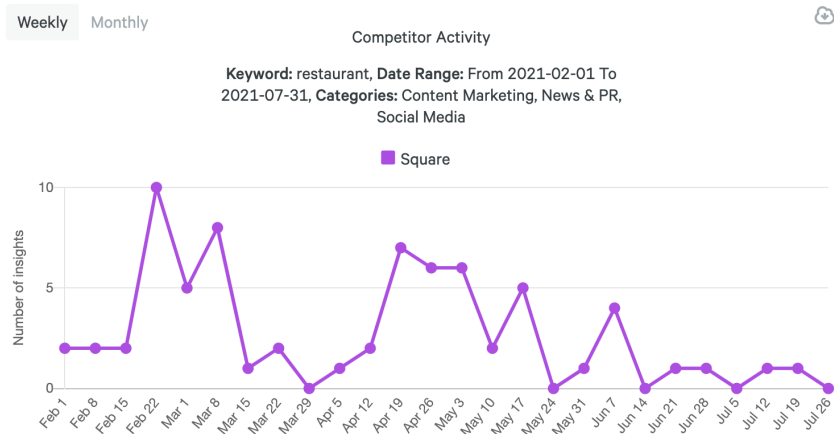
Now that we've laid it all out there when it comes to Square and the restaurant POS software industry as a whole, let's reflect on why we believe Square led the conversation over the past year.

- For content marketing, Square produced the highest volume of posts for blogs and YouTube videos—the most frequently used assets in the industry. The Square company name was even a top trending term within all content marketing channels and assets.
- For social media, Square was victorious for the highest frequency of tweets and was a top term on social media in the Word Cloud.
- For news and PR, Square secured victory in every category: the volume of press releases, the number of mentions in the media, and earned a spot as a leading term in the Word Cloud.
- For messaging and copy, Square was consistent. Although they didn't have a top peak in the graph, they likely didn't feel the need to adjust. Their positioning was already strong.

Key takeaways (cont.)



To wrap up this report, take a look at the below graph. It's important to point out that, over the past few months, Square has greatly reduced the number of mentions of the word **restaurant** in all content marketing, social media, and news and PR activities. Chances are they know they're leading for restaurant POS—they're now focusing their efforts on dominating new industries!



We hope that this report has been helpful in your understanding of not only the restaurant POS software industry but the types of insights that can be found using Crayon's competitive intelligence software-driven platform. If you'd like to learn more about how our technology can give your company a competitive edge, visit our [website](#) today.



Crayon is the award-winning competitive intelligence platform that enables mid-market and enterprise businesses to track, analyze, and act on everything happening outside their four walls. Tens of thousands of CI practitioners and stakeholders use Crayon to win deals, improve market positioning, inform long-term strategy, and optimize product roadmaps. Only with Crayon can you leverage competitive intelligence to the extent that's needed in order to grow revenue and market share over the long term.