

IDC MarketScape: Worldwide Mobile Point-of-Sale Software Platforms for Fashion Retail 2025 Vendor Assessment

Margot Juros

Filippo Battaini

Vijay Sarathi Gollapalli

THIS EXCERPT FEATURES SALESFORCE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Mobile Point-of-Sale Software Platforms for Fashion Retail Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Mobile Point-of-Sale Software Platforms for Fashion Retail 2025 Vendor Assessment (Doc # US52037824).

IDC OPINION

Fashion retail has undergone a rapid transformation in recent years, quickly evolving to meet heightened customer expectations for seamless omni-channel and personalized experiences, all while facing significant challenges, including margin pressures/increased competition, waning customer loyalty, labor shortages, rising theft, fraud, and safety issues as well as the dire need to modernize technology to become more agile and create differentiated customer engagement.

According to IDC Retail Insights' 2024 *Global Retail Survey*, apparel retailers are prioritizing IT investments to address their biggest store operations pain points, including the need to improve customer data quality and visibility and make demand forecasting more accurate, lack of brand consistency across shopping journeys, and the elimination of customer friction points in omni-channel journeys. Retailers increasingly see mobile engagement and composable commerce platforms as the solution to key challenges. In fact, apparel retailers' top 3 planned technology investments are:

- **Mobile devices for customer-facing applications**, such as mobile point of sale (mPOS), queue busting, and clienteling
- **Integrated, composable store platforms**, encompassing point-of-sale (POS), payment, commerce, and store functions
- **RFID and other sensors** for fraud/loss prevention and inventory management

Key benefits for fashion retailers that have adopted composable unified mPOS/POS platforms include greater customer experience and satisfaction from personalized clienteling and omni-channel applications such as endless aisle, as well as improved associate experience from having all the information they need in their hands and the new ability to engage with customers and build sales and loyalty.

Modern mPOS/POS platforms that enable real-time access to unified data from across channels and applications, along with built-in AI, are becoming essential for fashion retailers trying to meet new and evolving customer expectations to drive loyalty and sales.

Today's shoppers expect seamless omni-channel shopping and are increasingly willing to walk away from brands that do not meet the raised bar. For example, according to IDC's 2024 *Global Consumer Survey*, loyalty programs and a variety of payment options are among the most important features when choosing where to shop. The top 3 areas consumers said would make the biggest improvement to their shopping experience can be attained with modern, unified mPOS:

- Real-time information on availability/location of items
- Staff provision of personalized assistance/advice
- Personalized offers/promotions/pricing

Amid this period of rapidly changing expectations and new challenges, fashion retailers increasingly recognize the benefits of mPOS solutions that help drive customer loyalty and competitive success. Retailers are looking to technology partners for solutions that can enable seamless omni-channel retailing with cohesive customer experience and personalized engagement built on configurable mPOS/POS platforms, offering seamless integrations and unified data and AI, to gain the agility to meet changing business and customer needs.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

For inclusion in this study, IDC Retail Insights stipulated that a vendor should meet the following criteria:

- Has an established reputation offering a mobile POS software platform for the fashion segment of the retail industry, with significant presence and multiple current fashion retail customers using their mPOS software solution
- Offers an enterprise-ready omni-channel mPOS software solution providing advanced omni-channel point-of-sale capabilities and fashion-specific functionalities
- Has an mPOS offering for fashion retail that enables transactions, queue busting, and clienteling/save the sale and offers a range of additional features relevant to fashion retail, such as inventory management, omni-channel returns, endless aisles, and loyalty
- Has a multinational presence, with a significant presence in two or more countries or regions globally

ADVICE FOR TECHNOLOGY BUYERS

When it comes to technology, mPOS/POS platform vendors have significantly evolved their offerings in recent years, especially in areas of cloud-based flexible, composable

architecture; unified data with built-in AI; omni-channel applications; and more associate-friendly solutions. IDC advises technology buyers to look for the following when selecting a mPOS solution:

- **Prioritize flexibility/composability:** Seek technology partners that offer a highly configurable, flexible mPOS platform that gives retailers more control in configuring the system to meet their unique business needs and the ability to quickly pivot as new business needs or changing customer expectations dictate. Consider cloud-based mPOS platforms built on microservices architecture, with a full API library of relevant services and no-code/low-code tools to facilitate composing UI and new workflows to meet the needs of your business. In addition, consider flexibility and choice in terms of operating systems, mobile devices (iOS, Android), clouds, and deployment options to meet your needs.
- **Leverage unified data:** Consider vendors that prioritize data visibility and unified data (from multiple touch points), along with AI/analytics to gain critical business insights that can help retailers improve business efficiency, address margin pressures by reducing costs, and better drive cohesive, personalized omni-channel customer experiences across the business.
- **Seek AI innovation:** Evaluate the level of AI-driven integration the vendor has already deployed (such as AI-based shopping assistants and AI-driven personalized product recommendations) and what AI applications are on the vendors' near-term road map, including plans for agentic and GenAI solutions that can help drive revenue, enhance automation/efficiency, and build competitive differentiation.
- **Consider employee experience:** With ongoing labor shortages and high turnover rates, consider mPOS solutions featuring good UX and intuitive interfaces to make training less time-consuming and boost employee experience. In addition, seek vendors offering new features to improve associate experience, such as runner applications to streamline associate tasks on the shop floor, gamification applications, or clienteling tools to facilitate better engagement with shoppers.
- **Ensure payment flexibility:** Ensure mPOS vendors are committed to offering the widest range of payment types and options to drive greater consumer loyalty and increase revenue by enabling new types of customers to transact with the business. Consider mPOS systems with payment flexibility to offer your customer base's favorite payment types and ease the ability to quickly add new payment types that customers want.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Salesforce

Salesforce is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide mobile point-of-sale software platforms for fashion retail.

Salesforce was founded in 1999 and offers SaaS-based customer relationship management software. Based in San Francisco, the company has grown its offerings since its founding to include a wide range of customer/CRM, commerce, sales, and marketing solutions, as well as its Agentforce line of agentic AI solutions. The company has a well-established digital commerce platform, Salesforce Commerce Cloud, and in 2024, it acquired its longstanding POS partner, Predictspring.

Retail Cloud is Salesforce's unified, full-featured POS platform designed to enable all aspects of omni-channel retailing, offering mobile and fixed POS, endless aisle, mixed cart, clienteling, and inventory management, along with prebuilt integration into Salesforce Commerce Cloud, OMS, and CRM, enabling a unified view of customers and the ability for brands to sell and service customers seamlessly across channels. The SaaS-delivered solution is built on a modular, cloud-native, mobile-first platform with API-first architecture for easy integrations and allows retailers to compose and configure the solution in a way that best meets their business needs. Retail Cloud has AI capabilities built in, enabling AI-driven features such as an AI-based voice assistant and AI-driven personalized product recommendations. The solution offers headless benefits and a no-code CMS to make it easy to customize the POS to a retailer's brand look and feel and supports resiliency with robust offline mode. Retail Cloud does not differentiate between mobile and fixed form factors, offering consistency across all endpoints, including self-checkout, kiosks, mobile devices, and fixed terminals.

Salesforce's road map for Retail Cloud includes greater use of agentic AI and optimizes clienteling with extended features. Key new features/functions on the road map include Agentforce integrations such as Shopper Agent, which provides personalized recommendations for customers throughout their store shopping journey and delivers an agentic layer to enhance store and staff operations. Salesforce Retail Cloud currently runs live in more than 20 countries, and Salesforce plans to continue extending its global footprint to additional countries.

Strengths

- **Unified, composable omni-channel:** Retail Cloud's cloud-native, API-first platform offers a fully integrated omni-channel solution complete with POS, Commerce Cloud, and order management and is one of the few vendors offering seamlessly integrated POS with its own ecommerce and order management capabilities. The full-featured solution offers key functionality for fashion retailers, including clienteling, inventory management, endless aisle, and omni-channel fulfillment, as well as prebuilt integrations into additional relevant Salesforce offerings, such as loyalty, personalized marketing, engagement, and AI agents. Retail Cloud benefits from Salesforce's deep expertise in CRM solutions.
- **Highly configurable and extensible solution:** The modular design of the Retail Cloud POS platform makes it fast and easy to configure, allowing retailers to compose the solution to meet their unique business needs. The solution also facilitates composability with a headless UI and no-code CMS.
- **A focus on data and AI:** The Retail Cloud platform offers significant benefits due to its strategic focus on enabling advanced AI-driven features. The solution enables retailers to bring together real-time inventory and shopper data and apply AI analytics to drive more personalized and engaging omni-channel shopping, as well as supporting built-in AI features such as AI-based voice assistant and fraud analytics. Salesforce also integrates agentic AI from Agentforce to extend benefits such as greater operational efficiency and improved shopping experiences.

Challenges

- **POS integration:** Salesforce acquired PredictSpring in late 2024 to develop its Retail Cloud with a modern POS offering. PredictSpring is a longstanding Salesforce ISV partner of over 10 years and was the first POS to integrate with Salesforce OMS. Though the solution now has many robust integrations into the Salesforce core platform, utilizing common data objects, Salesforce is still in the process of fully integrating all capabilities across the Retail Cloud offering. While the solution is already complete and fully functional, there may be a few changes or additions as the solution becomes fully realized.
- **Lack of Android support:** Salesforce Retail Cloud currently supports iOS-based mobile devices but does not offer the same support for Android-based devices, which may be a problem for retailers that already use other Android-based solutions. However, Salesforce has added Android support to its Retail Cloud road map and will be able to support Android within the next few years.

Consider Salesforce When

Salesforce Retail Cloud is particularly well suited to retailers seeking a modern, fully featured POS solution that seamlessly integrates online and offline shopping experiences together with a strategic focus on advanced AI capabilities and significant CRM expertise.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the estimated retail revenue of the individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

This IDC study represents an assessment of worldwide mobile point-of-sale (mPOS) software platform vendors with offerings for fashion retail. This research is a quantitative and qualitative analysis of the features, functionalities, and strategic road maps that explain the success of the major mPOS providers in fashion retail, with a particular focus on omni-channel features and capabilities relevant to this segment. POS software is related to the management of transactions and sales in retail, including sales reporting, sales indicators, exception reporting, and cash accounting. Many modern mPOS solutions include omni-channel capabilities and related features, including loyalty, omni-channel applications, and fulfillment. Given the fragmentation of the POS solution market, this study focused on the most prominent mPOS solution vendors in the market or ones that are emerging very quickly, covering global vendors addressing omni-channel mPOS needs with significant market presence in the fashion segment.

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Related Research

- *Moving the Goalposts: NRF 2025 Introduces Change* (IDC #US53227525, March 2025)
- *Transforming the Checkout Experience in Bricks-and-Mortar Stores* (IDC #EUR153211225, March 2025)
- *IDC MarketScape: Worldwide Point-of-Sale Software Platform Vendors in Retail Fuel and Convenience 2025 Vendor Assessment* (IDC #US51800224, February 2025)
- *Empowering Checkout Experiences: A Review of Point-of-Sale Innovations in Asia/Pacific Retail Landscape* (IDC #AP50981324, December 2024)
- *IDC Retail Insights' Global Retail Survey, 2024: Findings and Implications* (IDC #US51558623, November 2024)
- *IDC MarketScape: Worldwide Retail Omni-Channel Payment Platform Software Providers 2024 Vendor Assessment* (IDC #US51168024, June 2024)
- *IDC Market Glance: Omni-Channel Retail POS and Payments Software, 2Q24* (IDC #US49334122, May 2024)
- *Market Presentation: A Super Platform for the Modern, Omni-Channel Store* (IDC #US52025324, April 2024)
- *IDC MarketScape: Worldwide Point-of-Sale Software in Midsize Apparel and Softlines Retail 2023 Vendor Assessment* (IDC #US48079822, March 2023)

- *IDC MarketScape: Worldwide Point-of-Sale Software for Large Apparel and Softlines Retail 2023 Vendor Assessment* (IDC #US48621522, March 2023)

Synopsis

This IDC study examines the key strategies and capabilities of mPOS software platform vendors for fashion retail. It evaluates vendors' strengths as omni-channel partners and the vendors' mPOS capabilities, including mobile, integrations, data and AI/analytics, customer engagement, configurability, extensibility, and scalability. A key component of the evaluation is how buyers perceive the benefits of the mPOS software platforms in meeting the quickly evolving needs of all levels of fashion retail in today's market.

"Significant changes in the fashion retail environment mean retailers need to quickly evolve to meet new, heightened customer expectations for seamless, personalized omni-channel experiences while overcoming major challenges, including waning customer loyalty, increased margin pressures/competition, and rising fraud/loss, creating a dire need to modernize technology for increased agility and the ability to create differentiated customer engagements. Fashion retailers are looking to mobile POS solutions that are configurable and enable seamless integrations and omni-channel applications and that leverage unified data and AI to provide the agility needed to meet rapidly changing business and customer needs and ensure competitive differentiation," according to IDC Retail Insights analysts Margot Juros, Filippo Battaini, and Vijay Sarathi Gollapalli.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

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