About IHL Group

Who We Are
IHL Group is a global research and advisory firm specializing in technologies for the retail and hospitality industries. The company, based in Franklin, Tenn., generates timely data reports, offers advisory services and serves as the leading retail technology spokesperson for industry and vendor events.

What We Do
IHL provides customized business intelligence for retailers and retail technology vendors, with particular expertise in supply chain and store level systems. Our customers are retailers and retail technology providers who want to better understand what is going on in the overall technology market, or wish to identify specific equipment needs for the retail market.

When We Started
Greg Buzek served as Product Development Manager for two Fortune 500 retail technology suppliers for 6 years. Faced with making recommendations to senior management with spotty reports stuffed with technical jargon and unsubstantiated data, in 1996 he left to form IHL Group as an arms length consulting firm that delivers exacting research to corporate managers.

How We Work
Reliable market analysis is essential for corporations to accelerate revenue and expand their market share. Most research providers do not disclose data sources or statistically defend the validity of their assumptions. We do. We disclose in precise detail exactly how and why we reached our conclusions so that our customers can be comfortable with the data they are using.

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Our associates and advisors have over 100 years combined years of retail technology experience. Our associates have worked as product managers, sales representatives and executives in the retail market. We have the relationships, tools, and experience to meet your research and consulting needs.
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Introduction

Background, Objectives

Common core POS functionality is more complex for these retailers.
This study addresses the specific aspects of POS software used in Specialty Hardgoods retailers.

- Common core functionality of the POS Systems
- Key economic and technological trends that impact the retail landscape
- Vendor market share and positioning
  - Number of Accounts
  - Number of Lanes / Licenses
  - Total Retailer Revenues Represented
INTRODUCTION

Common Core POS Functionality

A common POS systems in Specialty Hardgoods have some of the following functionality

- UI and architecture designed to maximize customer throughput
- Integration with:
  - WFM (Labor Scheduling, Time & Attendance, Task Mgmt) applications
  - (or incorporation of) Loss Prevention
  - Multiple sales channels, Save the Sale, tightly integrated w/e-commerce
  - Enterprise systems (financial, supply chain, merchandising)
- Support for Mobile POS (native form or as interface to other products)
- Support for company loyalty program initiatives
- Full training mode
- Interactive Help menus to assist cashiers at each stage of the transaction
- Adherence to ARTS (Assoc. for Retail Technology Standards) requirements
- Ability to provide home store or local store inventories by item
- Perform Gift/Phone card activations
- Returns management capability
- Architected to be highly secure
- Employee portal for accessing schedule, company email, etc.
- More complex than in other retail segments
Diverse retailer types, but all tend to be early technology adopters.
Segment Conditions

- Diverse Retailers
  - DIY / Hardware
  - Bookstores / News Stands
  - Sporting Goods
  - Pet Stores
  - Consumer Electronics / Appliances
  - Office Supplies
  - Auto Parts
  - Toys

- Early Adopters of Retail IT
- More Complex Transactions
  - Maintenance agreements, rebates, delivery instructions, etc
- Short POS Lifespan (4-5 years vs 10-20 for Food/Dept Stores)
- Showrooming “Victims”
- Cut Their Competitive Teeth with the Rise of the Internet
Some of the Software Players
Key Economic Trends Affecting Retailers
**Key Trends Affecting Retailers**

- **General Economic Conditions**
  - Retail Sales up 2.6%, CPI up 0.8%
  - Gas prices on decline again
  - Overall prices up 21.3% over past decade
  - GDP has risen but 14.8% since the downturn
  - Unemployment rate 5.3% but labor participation is 62.6%, lowest since the 1970s.
  - Median household income is 8.0% lower than in 2007, hindering retail growth.
  - Stock market volatility bringing uncertainty to retail markets.

- **Mergers & Spin-offs**
  - Toshiba acquired IBM RSS (4/12)
  - JDA acquired Red Prairie (12/12)
  - NCR acquired Retalix (2/13)
  - Oracle acquired MICROS (6/14)
  - Epicor spun-off Aptos (6/15)

- **Unified Commerce Drives System Purchases**
  - Retail systems need to work in harmony, but Retailers have set up disparate IT silos for each channel
  - 87% of consumers believe retailers need to create a seamless customer experience
  - Wallet share increase – 2-channel customers spend 4x, 3-channel customers spend 8x lifetime

- **Distributed Order Management Takes Over**
  - Central commerce hub handles customer, product and supplier data to provide “one version of the truth”
  - 63% of Retailers are looking at Distributed Order Management as base for their next POS
  - This can change the entire transaction landscape. POS, Mobile, eCommerce.
Key Trends, Con’t

- **Mobile...Everywhere?**
  - Still in an infancy stage
  - Roadmap is still lacking
  - Not much pure Mobile POS in enterprise
  - The mindset of “Mobile POS along with traditional POS”.
  - Still too kludgy for many retailers

- **Price Pressure**
  - Fierce competition from both inside and outside the segment
  - Online retailers, especially Amazon, have a huge impact
  - “Showrooming” is an issue
  - Increasing quality and branding drives down prices

- **Store System Priorities**
  - For Hardgoods retailers, Unified Commerce integration is the top priority, as claimed by 65% of surveyed retailers
  - Mobile for Consumers – 54%
  - Advanced CRM/Loyalty – 46%
  - Mobile for Associates – 42%

- **Assistance - RAPID Project Tools**
  - Making an IT decision is easy, bringing it about is not
  - IHL/C-Core provides Templates & Tools for Scope Definition, RFP Development, Vendor Selection and Project Execution
  - Average 12 week reduction in RFP process
  - 40 vendors evaluated in past 3 years
  - Successful engagements with Dick’s Sporting Goods, RONA, Sobey’s, The Pantry, Krispy Kreme, and others
POS Software

Lots of software players, with lots of competitive approaches
POS SOFTWARE DATA

Approach/Ranking Determination

Start with Sophia Data Service
- 9,448 Company Records, of which
  - 5,676 are Retailers with 50+ Stores, of which
  - 1,1647 are Specialty Hardgoods Retailers, of which
  - 866 in DB based in North America
  - Subsidiaries were consolidated under the parent company
  - North America retail store contributions only considered
    - Locations / Lanes
    - Revenues
  - Unless otherwise specified, duplicate vendor claims of a particular Retailer account were awarded equally
    - Each vendor gets credit for 1 Account
    - Each vendor gets credit for half the Licenses and half the Revenues
  - For the top 200 retailers, their POS software vendors are identified and those vendors are ranked in terms of:
    - Total Accounts represented
    - Total Licenses / Lanes represented
    - Total of retail Revenues represented
  - The rankings for each vendor are summed, low score wins

Results: Close Competition
- Competition for top accounts continues to increase – high number of ties
- Oracle and Aptos are clear of the rest of the field, separated by one ranking point
- Fujitsu and SAP are a distant 3rd & 4th
- Seven ranking points separate positions 3 through 6
- Three ranking points separate positions 7 through 10
- First time this year, we used a 5% normalization to account for errors in Lane count and Revenues

Familiar Names at the Top
- Oracle, SAP and Aptos (as Epicor) have been in the top 5 each of the last 8 years
- Fujitsu and JDA have been in the top 5 in four of the past eight years

Market Effects
- Oracle acquisition of MICROS takes firm hold of leadership position
- Toshiba acquisition of IBM RSS gaining mindshare and name recognition
- Recent Epicor spin-off of Aptos runs in opposite direction – market definition and consolidation is their goal
POS SOFTWARE DATA

Account Share of Top 200 Retailers

- **Highly Fragmented**
  - The “Other” category contains nearly 40 vendors
  - Leading vendor has less than 20% share
  - Second-place vendor has less than 10% share

- **Expected Names Are Present**
  - Oracle
  - JDA
  - SAP
  - Toshiba
  - Fujitsu
  - PCMS

- **Someone is Missing**
  - Epicor, the leader for the past 4 years, is ranked only 8th this year
  - Aptos was spun-off from Epicor in June 2015. Aptos’ focus is Specialty Softgoods retailers, while Epicor POS is now focused on smaller Hardgoods retailers

Source: IHL Group 2015

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POS License Share of Top 200 Hardgoods Retailers

- **Semi-Fragmented**
  - Top five vendors have 54% of the license share
  - Key names: Oracle, Epicor, Fujitsu
  - The “Others” category has more than 30 vendors

- **Est. 1,000 POS SW Vendors**
  - NCR, DemandWare, Microsoft, Retail Pro, Raymark, Netsuite, Celerant are leading names in the “Others” category

- **Vendor Viability is Key**
  - The relationship between a Retailer and a Vendor is typically long-term
  - The Vendor can grow with the Retailer

Source: IHL Group 2015
Marketing Approach
- Target All Accounts – JDA, Aptos & DemandWare are the only vendors where their Accounts share exceeds their Revenues share by >2%
- Target Big Accounts – Oracle & Fujitsu are the only vendors where their Revenues share exceeds their Accounts share by >2%

Landscape Changes
- Oracle’s acquisition of MICROS grew their share significantly
- Epicor’s spin-off of Aptos reduced theirs

# of Accounts
- Number of accounts helps revenue, but largest specialty stores are multiples of the smaller so not as big a push in rankings.
## Ranking Determination

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<th>Vendor</th>
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<th>Accounts Rank</th>
<th>POS Licenses Rank</th>
<th>Managed Revenue Rank</th>
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<td>1</td>
<td>1</td>
<td>1</td>
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<td>DemandWare</td>
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<td>6-Tie</td>
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</table>

*Source: IHL Group 2015*
POS SOFTWARE DATA

IHL Insight – Vendor Positioning

POS Software Vendor Position Among Top 200 North American Specialty Hardgoods Retailers

Combined Revenues of Accounts Represented ($Billions)

# Retail Accounts Installed of Top 200

Size of Bubble = Total Number of SW Licenses in Top 200 Accounts

Source: IHL Group

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Top POS Providers
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
Phone: (800) 392-2999

Company Overview
Oracle (NYSE: ORCL) offers solutions for every tier of a business – database, middleware, business intelligence, business applications, and collaboration. Oracle provides retailers with an integrated suite of business applications, server and storage solutions that are engineered to work together to optimize every aspect of their business.

Oracle was always involved in Retail, but they didn’t really start having a heavy focus until they acquired Peoplesoft, Retek, Profitlogic, Siebel and 360Commerce in 2005. The June 2014 acquisition of MICROS changed the POS software landscape, as MICROS had a stable of hundreds of Specialty retail POS software clients.

Application Overview
With the 2014 acquisition of MICROS, Oracle now offers two POS solutions; Oracle Retail Point of Service (based on the 360Commerce 360Store solution), and Oracle Retail Xstore Point of Service (based on the MICROS/Datavantage Xstore solution).

Oracle Retail Point of Service key features:
- Java-based
- Cross-channel, save-the-sale, and line-busting
- Intuitive GUI
- Customer purchase, profile and loyalty information
- Cross-sell and up-sell capability
- Promotional pricing capabilities

Oracle Retail Xstore Point of Service key features:
- Commerce-anywhere capability
- Store analytics
- Sales audit
- CRM
- Stored value / loyalty / gift cards
- Time & attendance
- Promotional pricing capabilities
Key Retail Acquisitions
- MICROS Systems, June 2014
- 360Commerce, January 2006
- ProfitLogic, July 2005
- Retek Inc., April 2005
- PeopleSoft, January 2005

Complimentary Applications
- POS Hardware – Dell, Fujitsu, HP, Lenovo, NCR, Omnico, Toshiba, UTC Retail
- Merchandise Allocation – JDA, Manhattan Associates, MI9, Oracle, Quantum Retail Technology, SAP
- Merchandise Planning – CrossCap, Cognos, DemandTec, Epicor, RedPrairie, Island Pacific, ITR Software, JDA, JustEnough Software, Logility, Manhattan Associates, Maple Lake, Oracle, Predictix, Quantum Retail Technology, Retail Pro, Reflexis, SAP, Teradata
- Inventory Management – 4R Systems, ASDIS Software, Axida, B2 Integration, Claris Solutions, Crossmark, Epicor, Inform, Infor Global Solutions, JDA, John Galt Solutions, Manhattan Associates, MI9, Open Text, Oracle, PCS Technologies, Predictix, SAP, SDI Industries, Silvon Software

Representative Customers
- Home Depot
- Pittsburgh Paint
- Tractor Supply
- O’Reilly Automotive
- Pep Boys
- Sur La Table
- Big 5 Sporting Goods
- Hibbet Sports
- Pet Supermarket
- West Marine
- Books-A-Million
- Gander Mountain
- Things Remembered
- Guitar Center
- Modell’s Sports

Note: Customer information and complementary systems installed are based on public statements or secondary web research. We have attempted to be as broad as possible in the choices that we found. For specific installations, please contact the vendors involved.
Fujitsu America, Inc.
1250 East Arques Avenue
Sunnyvale, CA 94085
Phone: (800) 831-3183

Company Overview
Fujitsu America, Inc. is the North American subsidiary of Tokyo-based Fujitsu Limited. Fujitsu America provides hardware, software and services for the store and related infrastructure to help retail companies become more agile. Core products/services include infrastructure management and networking services, point-of-sale (POS) hardware and software, self-service technology, wireless devices for mobile retailing, and solutions for loyalty, data management and centralized returns.

The group currently handling the retail solutions was formerly known as Fujitsu Transaction Solutions until they were brought under a unified corporate structure and renamed Fujitsu America in April 2009.

Application Overview
GlobalSTORE, Fujitsu’s full-featured, customizable POS, cash management and back office application, is tailored for small specialty to large chain retailers. GlobalSTORE supports the latest retailing features, such as Internet connectivity and multimedia presentations. GlobalSTORE does not require custom programming or an accomplished programmer. Customers note that GlobalSTORE is on average 40 percent less expensive to own and customize than other solutions.

Some of the features include:
- Open architecture
- Scalable from 1 to over 400 fat or thin clients
- Customization tools for ease of modification
- Proven base that ensures continued enhancements
- ARTS-compliant relational database
- Flexible support for promotional events
- Seamless support for offline functionality
- Easy Internet and Web access
- Web-based backoffice application

TOP POS SOFTWARE PROVIDERS

Fujitsu, Con’t

Key Retail Acquisitions
- ICL, October 1998
- Optimal Robotics, April 2004

Complimentary Applications
- POS Hardware – Fujitsu, HP, NCR, Toshiba, Wincor Nixdorf
- Sales Audit – Aspect Loss Prevention, Checkpoint Systems, Epicor, IDM Software, InVue, MI9, MICROS, Myriad Technologies, NPD Group, Reflexis Systems, SAP, Security Source, Tyco, USS Corporation, VigilEnt
- Merchandise Allocation – JDA, Oracle, SAP
- Merchandise Planning – CrossCap, DemandTec, JDA, Manhattan Associates, Oracle, SAP, SAS
- Inventory Management – AbsoluteSKY, Epicor, JDA, Manhattan Associates, MI9, MICROS, Oracle, Planalytics, Retalon, RGIS, Riversand, SAP, Softechnics

Representative Customers
- Best Buy
- Staples
- HomeGoods
- Sears Tire
- RadioShack
- Office Depot
- Recreational Equipment, Inc.

Note: Customer information and complementary systems installed are based on public statements or secondary web research. We have attempted to be as broad as possible in the choices that we found. For specific installations, please contact the vendors involved.
Company Overview
JDA Software (NASDAQ: JDAS) provides enterprise software products and related services to help retailers track inventories and purchase orders. JDA’s retail portfolio includes merchandising, financial, and decision support systems at the corporate level; point-of-sale, back office, and distributed processing applications at the store level; and warehouse management and logistics at the distribution level.

Over the years, JDA’s commitment to retail’s evolving requirements has secured a market leading position. A series of acquisitions (Arthur 1998, intactix 2000, E3 2001, Manugistics 2006, i2 2010) has broadened and deepened their retail portfolio. The November 2012 acquisition of JDA by Red Prairie (the merged company retains the JDA name) further bolsters that position. The global sales and delivery infrastructure includes more than 60 offices throughout North America, LATAM, EMEA and APAC.

Application Overview
Based in Java, JDA Point-of-Sale is a slim-client store solution designed to help retailers save costs on maintenance, labor and hardware resources. This solution takes the place of Win/DSS and features a component-based architecture. An application server delivers scalability, flexibility and reliability. Retailers can simplify the customization, distribution and maintenance of their store system without compromising functionality or usability. It features POS and back office functions, as well as real-time access at the POS to a retailer’s corporate system. Rapid software adjustments or upgrades on every register throughout the chain can be made as frequently as needed.

Key features include:
- POS for multi-channel environments
- POS Computer-based training
- JDA or 3rd-party merchandising interface
- Rules-based promotion engine
- Real time analysis of product info, inventory or sales data
- Customer data tracking / analysis
- Loss Prevention
TOP POS SOFTWARE PROVIDERS

JDA, Con’t

Key Retail Acquisitions
- Merged with Red Prairie, November 2012
- i2, January 2010
- Manugistics, July 2006
- E3, September 2001
- intactix, April 2000
- Arthur, June 1998

Complimentary Applications
- POS Hardware – Fujitsu, HP, NCR, Omnico, Toshiba, Wincor Nixdorf
- Sales Audit – Aspect Loss Prevention, Checkpoint Systems, INA Solutions, InVue, LP Software, MI9, MICROS, Myriad Technologies, NPD Group, Red Five Interactive, Security Source, USS Corporation
- Merchandise Allocation – Accenture, JDA, MI9, Oracle, SAS, Teradata
- Merchandise Planning – AC Nielsen, DemandTec, Escalate Retail/Red Prairie, JDA, k3 Business Technology Group, Logility, Oracle, SAS, Teradata
- Inventory Management – Epicor, Hart Systems, Infor Global Solutions, JDA, JustEnough Software Corporation, Manhattan Associates, MI9, MICROS, Oracle, Osprey, PFSweb, RedPrairie, Teradata

Representative Customers
- Advance Auto Parts
- Petco
- Mattress Giant
- Forzani Group
- Family Christian Stores
- Floor & Décor
- Dunham’s Sports
- MC Sports
- Z-Gallerie
- Dick Blick Art Supplies

Note: Customer information and complementary systems installed are based on public statements or secondary web research. We have attempted to be as broad as possible in the choices that we found. For specific installations, please contact the vendors involved.
SAP
111 Sinclair Road
Bristol, PA 19007
Phone: (215) 785-4321

Company Overview
SAP (NYSE: SAP) is a German multinational corporation that makes enterprise software to manage business operations and customer relations. SAP is headquartered in Walldorf, Baden-Württemberg, with regional offices in 130 countries.

SAP’s Retail solution portfolio includes customer-centric solutions that focus on the “sell” side of retailing. They enable retailers to deliver a best-in-class customer experience across all channels, while helping them to optimize their operating efficiencies and increase profitability. SAP claims more than 2,700 retailers worldwide are SAP customers.

Most recently, SAP has discontinued their POS focus on Triversity’s Transactionware solution (acquired in 2005) and has instead migrated to the SAP Point of Sale by GK solution (formerly known as GK Software’s GK/Retail Suite). GK, for their part, is planning to acquire Virginia-based DBS Data Business Systems (payment processing, CRM/loyalty solutions).

Application Overview
The SAP Point of Sale by GK solution provides all the essential tools and processes needed to run a retail business. The software is based on Java and open standards making it easy to implement and maintain. This POS software suite offers retail store and enterprise solutions so that upfront and back end operations can be managed with one software package. GK claims over 200,000 installations in 38 countries.

Key features include:
- Java-based
- Thick or thin client
- Multiple channels (mobile, fixed, kiosk, etc)
- Promotion management
- Gift cards, coupons, pre-paid cards (plus on-line top-up)
- Inventory management
- Centralized or decentralized back office
- Customer-facing promotions
- Price checking

http://go.sap.com/solution/industry/retail.html
Key Retail Acquisitions
- GK Software, December 2013 (5% stake only)
- Hybris, June 2013
- SmartOps, February 2013
- SAF, September 2009
- Business Objects, October 2007
- Khimetrics, December 2005
- Triversity, September 2005

Complimentary Applications
- POS Hardware – Dell, Fujitsu, HP, NCR, Omnico, Toshiba, Wincor Nixdorf
- Sales Audit – Aspect Loss Prevention, Axis Communications, Checkpoint Systems, Epicor, InVue, Kliger-Weiss Infosystems, LP Software, MICROS, Myriad Technologies, SAP, Tyco, USS Corporation, VigilEnt
- Merchandise Allocation – Epicor, JDA, Jesta IS, Oracle, Quantum Retail Technology, Retail Pro, SAP
- Merchandise Planning – ANT USA, CrossCap, Escalate Retail/Red Prairie, JDA, Logility, Manhattan Associates, Oracle, SAS, DemandWare
- Inventory Management – AbsoluteSKY, Claris Solutions, Epicor, Hart Systems, Island Pacific, JDA, Jesta IS, Karabus, LS Retail, Manhattan Associates, Oracle, Planalytics, RGIS, Riversand, SAP, Softechnics, Sterling Commerce, Teradata, DemandWare

Representative Customers
- GameStop
- Williams-Sonoma
- Genuine Parts / NAPA
- Cabela’s
- Jo-Ann Stores
- Sports Authority
- Staples
- Hallmark
- Petland
- Paradies Shops

Note: Customer information and complementary systems installed are based on public statements or secondary web research. We have attempted to be as broad as possible in the choices that we found. For specific installations, please contact the vendors involved.
Toshiba Global Commerce Solutions
3039 Cornwallis Road
Research Triangle Park, NC 27709
Phone: (844) 457-8427

Company Overview
Toshiba Global Commerce Solutions (TGCS) is the formal name of the business created when Toshiba TEC acquired IBM’s Retail Store Solutions in April 2012. TGCS operates as a retail-focused subsidiary of Toshiba TEC Corporation.

TGCS is the leading supplier of POS systems with a worldwide install base larger than the next three competitors combined, and they have more shipments than the largest two combined. Overall global business operations, including development, sales and related in-store maintenance, remain in the Research Triangle Park area of North Carolina. IBM currently retains a 19.9% stake in the business.

TGCS solutions have the store as the primary focus, with added resources devoted to making the store work as part of Unified Commerce operations. Store analytics and customer solutions are also part of the mix.

Application Overview
TGCS provides three separate POS solutions; SurePOS Ace for Food/Drug and Hypermarkets, VisualStore for EMEA and APAC, and TCxGravity. TCxGravity is the go-to solution for the North American GMS market, and its features include:
- Sterling Commerce Order Management foundation
- Browser-based interface
- Flexible configurations
- One version of the truth for product, pricing and customer data
- Multi-channel focus
- Buy online, pickup/return in store
- EMV Chip & Signature
- Cash/Tender management
- Loss Prevention / Returns Fraud
- Store server dashboard
- Enhanced security
- Inventory visibility
- Tender options
Key Retail Acquisitions
- IBM Retail Store Solutions, April 2012

Complimentary Applications
- POS Hardware – NCR, Toshiba
- Sales Audit – Axis Communications, Checkpoint Systems, Epicor, MICROS, Myriad Technologies, Reflexis Systems, Security Source, Tyco
- Merchandise Allocation – JDA, Oracle, Retail Pro, Teradata
- Merchandise Planning – ANT USA, JDA, Island Pacific, Oracle, Retail Pro, SDL, Teradata, Unique Solutions
- Inventory Management – Epicor, JDA, Island Pacific, PurchaseSoft, Retail Pro

Representative Customers
- Bed Bath & Beyond
- Sherwin Williams
- Michael’s Stores
- Belron
- Academy Sports
- Garden Ridge
- Kirlins

Note: Customer information and complementary systems installed are based on public statements or secondary web research. We have attempted to be as broad as possible in the choices that we found. For specific installations, please contact the vendors involved.
Methodology
Background of the Study

This POS software study is the result of an iterative process that starts with our **Sophia Retail Technology Data Service**. Simply, Sophia tracks who-uses-what in terms of hardware, software and services, and is populated with publicly-available data on an ongoing basis. Our first step in the process is to run a query of all North American Specialty Hardgoods retailers in terms of their revenues, their store locations, and their lanes per location coefficient for our master list.

Once we have this information, we consolidate the master list by ensuring that all subsidiary banners are collected under their correct parent (we do this to avoid any double counting). We then run a new query that pulls the current data on POS software used by these retailers. Once these data are applied to the appropriate retailers, we generate a list of preliminary POS clients for each POS vendor, and we contact those vendors to ask for confirmation or any changes to their list.

While awaiting responses from the vendors, we check the retailers for the representative North American contribution to their store locations figure and their revenues figure, since Sophia tracks companies by their overall locations and revenue, not just their North American portion.

Once we receive responses from the vendors, we make the necessary changes to our master list, and take one last look for any holes in the data. We then identify the top 200 retailers and run pivot table analyses on them to establish the rankings in terms of the number of accounts for which they are responsible, the number of licenses (lanes) those accounts represent, and the overall revenue (retail sales) attributed to those accounts. We sum the rankings of those three for each software vendor, and the lowest overall total wins.
Report Limitations

The information in this study is based on the publicly disclosed information in our Sophia Retail Technology Data Service.

Since all rankings contained herein are based upon publicly released information and that which is confirmed by vendors, we must cite as a limitation those installations about which vendors and/or retailers remain reticent to share.

That said, experience shows that non-publicly-released information tends to have little effect on the rankings in this report. Although it might add depth, the overall market position of the players does not change.
Thank You

Contact Information
For more info, please contact us at

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greg@ihlservices.com
@gregbuzek
+1 615-591-2955
Other IHL Research Available

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<td>Cloud POS – Why the Time Might Be Right</td>
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<td>Retail 2018 – Retail Transformed – 12th Annual IHL/RIS News Study</td>
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<td>EMV: Retail’s $35Billion “Money Pit”</td>
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<td>CMO Takes Over IT Spend</td>
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<td>“We Lost Australia” – Retail’s $1.1 Trillion Inventory Distortion Problem</td>
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<td>mPOS – Houston, Do We Have a Problem</td>
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<td>North American Retail POS Terminal Study</td>
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<td>Rise of Distributed Order Management</td>
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<td>What do we see? Predictive Analytics/Data Visualization</td>
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<td>Beacons, Wayfinding and IOT in Retail – Trends and Best Practices</td>
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