

Global POS Software 2018

Executive Report and Market Database



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The information and data within this document are strictly confidential and must not be disclosed to a third party.

www.rbrlondon.com/retail

RBR's second POS software study further enhances the availability of in-depth global market intelligence for industry suppliers

Vendors lack data on global POS software market, despite critical role in omnichannel retailing

- ▶ In an omnichannel world, the in-store experience needs to echo, and enhance, online capabilities
- ▶ The POS application needs to be fully integrated into all “unified commerce” initiatives
- ▶ Vendors lack a reliable, global view of their market presence and that of their competitors



The study provides POS vendors with intelligence on the market and their competitors

- ▶ Understand overall market context, and identify future opportunities
- ▶ Benchmark vs. competitors, overall as well as in geographic and customer segments
- ▶ Provide authoritative, independent substantiation of market presence in marketing collateral

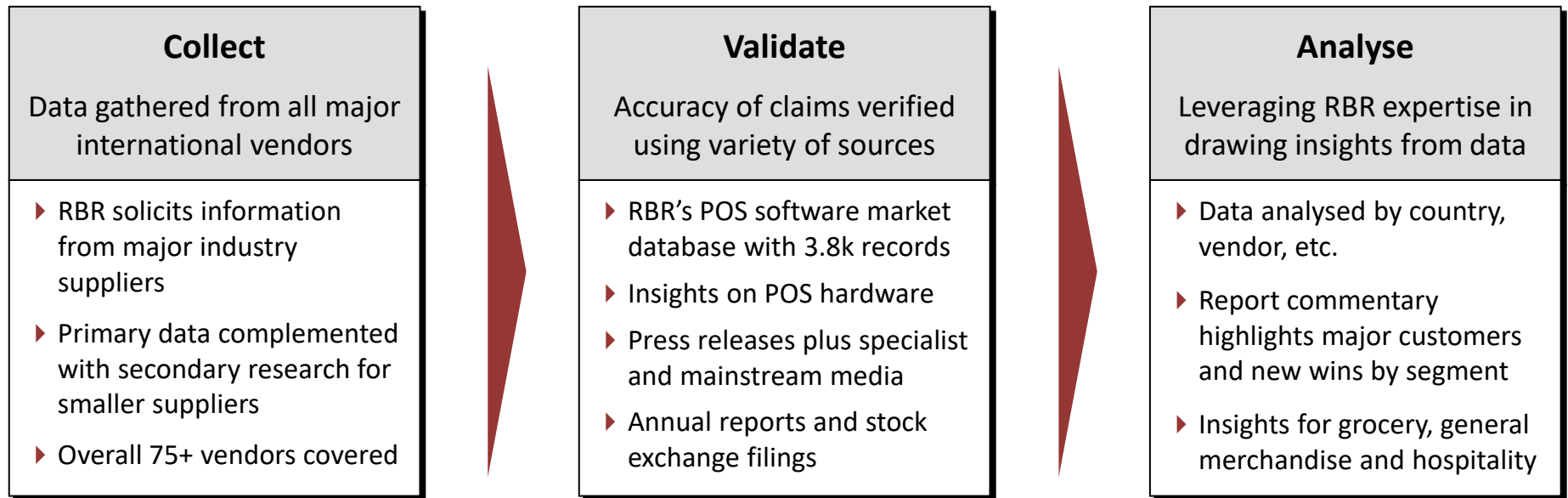
Global POS Software 2018 provides international vendors with the only comprehensive, in-depth view of the world market

Product	POS (point-of-sale/ point-of-service) applications
Geographies	Global coverage with data for 46 country markets across 6 regions
Segments	Data for 8 subsegments across grocery, general merchandise and hospitality industries
Vendors	75+ suppliers including <i>Aptos, Diebold Nixdorf, Fujitsu, NCR, NEC, Oracle, PAR Technology, PCMS, SAP/GK, Toshiba GCS, Veras, Xpient</i>
Customers	Projects with 1,000+ point-of-sale installations* globally
Metrics	Total POS installations – June 2018 and June 2017 New POS installations – 2016-2017, 2017-2018 and forecasts 2018-2023

* Irrespective of technical/commercial model e.g. licence , SaaS, cloud

Further details on the scope can be found in the Appendix

The study methodology builds on RBR's expertise in large-scale, global software studies, and is designed to ensure comparability and reliability



The study leverages RBR's expertise in syndicated software research studies, its deep knowledge of the POS market and its ability to draw insights from data

Study clients receive an executive report and a comprehensive market database, plus access to RBR’s project team

Client Deliverables

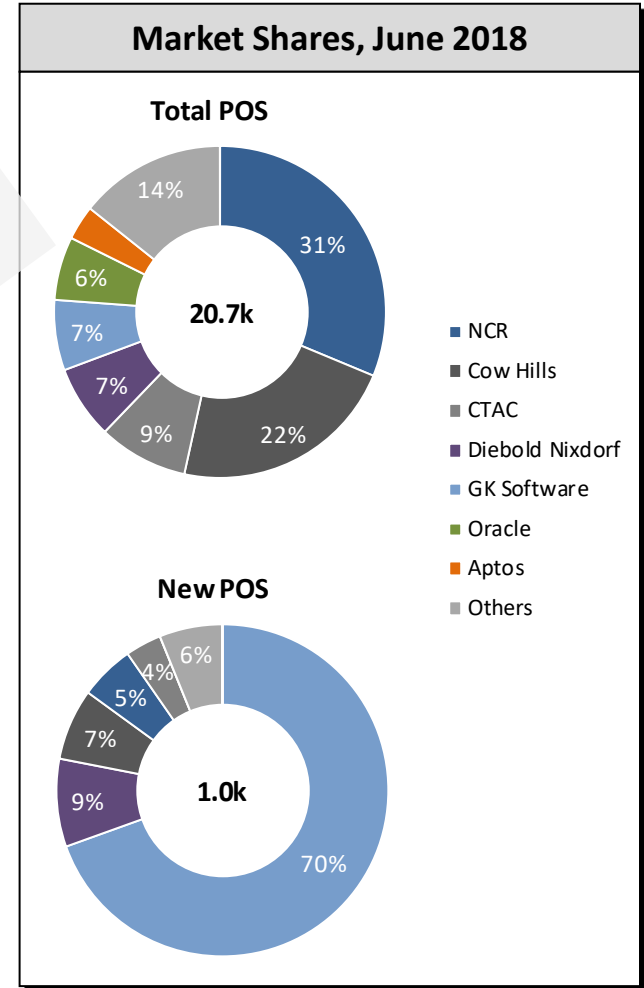
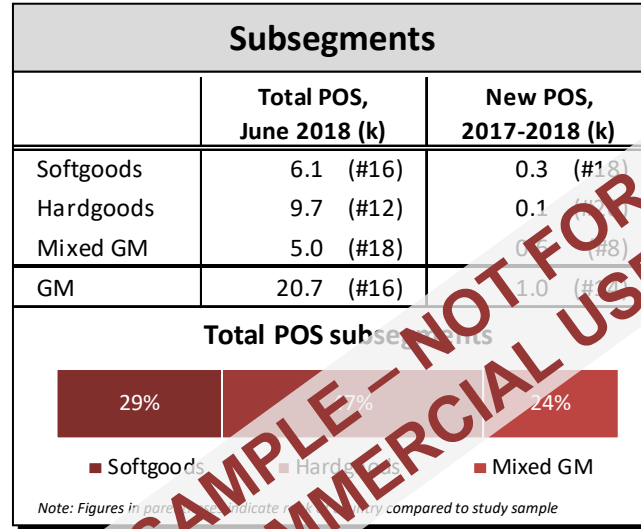
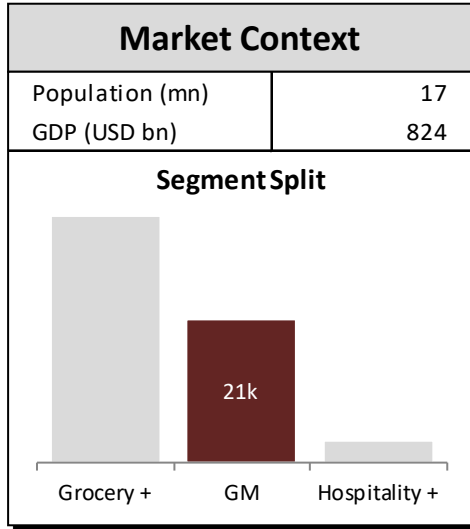
- ▶ Printed and electronic (multi-user licence) copies of research findings
 - Executive report in PowerPoint containing key market facts and commentary by country/region
 - Market Database in Excel
 - A conference call presentation of the study results can be organised if desired
- ▶ Privileged access to RBR’s senior researchers

Pricing

Geographic coverage	Full Report	Individual Segment [Grocery ⁺ / General Merchandise / Hospitality ⁺]
Global (Full Report)	£35,000	£17,500
EMEA	£18,000	£9,000
Americas	£12,000	£6,000
Asia-Pacific	£12,000	£6,000
International Overview <i>[World and regional market coverage]</i>	£15,000	£7,500

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NCR and Cow Hills represent more than half of all installations in the Dutch GM segment



- ### Key Insights
- ▶ NCR is the largest vendor in the Dutch GM segment, accounting for almost a third of installations
 - Its customers include local DIY chain Maxeda, which operates around 230 stores
 - ▶ Dutch vendor Cow Hills accounts for 22% of the POS software market within the Grocery+ segment, with its rPOS software used by mixed GM retailers HEMA and Action
 - ▶ Diebold Nixdorf has its POS software deployed at a wide range of customers, including at IKEA
 - ▶ GK Software accounts for the majority of new POS deployments as its solutions are used by an international department store chain which has expanded in the country
 - ▶ Oracle has a 6% share of the segment, with customers including C&A and Deichmann

The comprehensive Market Database provides full details on each vendor's presence, by country and subsegment

				GLOBAL POS SOFTWARE 2018											
				Total and New POS, by Vendor, Region, Country and Year - General Merchandise											
				Confidential - Internal Use Only											
Type	Year	Region	Country	Total	CEGID	Diebold Nixdorf	Be	air.com	Fujitsu	GEBIT	GK Software	Linx	NCR	NEC	Oracle
Total POS	June-18	Western Europe	France	XX.X	X.X	X.X					X.X		X.X		X.X
Total POS	June-18	Western Europe	Germany	XX.X	X.X	X.X			X.X	X.X	XX.X		XX.X		X.X
Total POS	June-18	Western Europe	Greece	X.X							X.X		X.X		X.X
Total POS	June-18	Western Europe	Ireland	X.X					X.X		X.X		X.X		X.X
Total POS	June-18	Western Europe	Italy	X.X							X.X		X.X		X.X
Total POS	June-18	Western Europe	Netherlands	X.X		X.X	X.X		X.X		X.X		X.X		X.X
Total POS	June-18	Western Europe	Norway	X.X		X.X	X.X		X.X		X.X		X.X		X.X
Total POS	June-18	Western Europe	Portugal	X.X		X.X	X.X				X.X		X.X		X.X
Total POS	June-18	Western Europe	Spain	XX.X	X.X	X.X	X.X				X.X		X.X		X.X
Total POS	June-18	Western Europe	Sweden	X.X		X.X	X.X		X.X		X.X		X.X		X.X
Total POS	June-18	Western Europe	Switzerland	XX.X	X.X	X.X	X.X				X.X		X.X		X.X
Total POS	June-18	Western Europe	Turkey	X.X	X.X	X.X					X.X		X.X		X.X
Total POS	June-18	Western Europe	UK	XXX.X	X.X	X.X	X.X		X.X		X.X		X.X		XX.X

SAMPLE - NOT FOR COMMERCIAL USE

Appendix

RBR has built deep retail industry knowledge through its annual study of the POS hardware market, and has great expertise in software research

Key Qualifications
<ul style="list-style-type: none">▶ 30 years' experience delivering international market research to diverse blue-chip client base▶ Expertise in studies of hardware, software and services▶ Carrying out annual study of global market for advanced point-of-sale hardware since 2008▶ Strong understanding of general and technology trends in the retail industry▶ Reputation for premium, independent syndicated research studies funded by industry suppliers



Types of Client
<p>Technology providers e.g. Diebold Nixdorf, Fujitsu, GK Software, HP, IBM, Microsoft, NCR, PayPal, Toshiba, Visa</p> <p>Consultancies e.g. Bain & Company, Boston Consulting Group, McKinsey & Company</p> <p>Private equity firms e.g. Advent International, Bain Capital</p> <p>Investment banks e.g. Goldman Sachs, Morgan Stanley</p>

The study has global scope, with data provided for six regions and 46 individual country markets

Asia-Pacific	North America	Latin America	Western Europe	Central & Eastern Europe	Middle East & Africa
<ul style="list-style-type: none"> ▶ Australia ▶ China ▶ India ▶ Indonesia ▶ Japan ▶ Malaysia ▶ New Zealand ▶ Philippines ▶ South Korea ▶ Thailand ▶ Others 	<ul style="list-style-type: none"> ▶ Canada ▶ USA 	<ul style="list-style-type: none"> ▶ Brazil ▶ Chile ▶ Colombia ▶ Mexico ▶ Others (incl. Caribbean) 	<ul style="list-style-type: none"> ▶ Austria ▶ Belgium ▶ Denmark ▶ Finland ▶ France ▶ Germany ▶ Greece ▶ Ireland ▶ Italy ▶ Netherlands ▶ Norway ▶ Portugal ▶ Spain ▶ Sweden ▶ Switzerland ▶ Turkey ▶ UK ▶ Others 	<ul style="list-style-type: none"> ▶ Czech Republic ▶ Hungary ▶ Poland ▶ Russia ▶ Slovakia ▶ Others 	<ul style="list-style-type: none"> ▶ Saudi Arabia ▶ South Africa ▶ UAE ▶ Others

The study provides data for nine subsegments across the retail and hospitality verticals

Customer Segments and Subsegments	Examples
Grocery+ <ul style="list-style-type: none"> ▶ Grocery: Supermarkets/hypermarkets, discounters, convenience stores <i>without</i> fuel ▶ Convenience stores <i>with</i> fuel ▶ Drugstore 	<ul style="list-style-type: none"> ▶ Tesco, Lidl, FamilyMart ▶ Shell ▶ Walgreens Boots
General Merchandise <ul style="list-style-type: none"> ▶ Speciality hardgoods: electronics, DIY/home etc. ▶ Speciality softgoods: apparel etc. ▶ Mixed general merchandise: mass merchandiser, department store, warehouse club etc. 	<ul style="list-style-type: none"> ▶ Best Buy, Home Depot ▶ H&M ▶ Walmart, Sears, Target
Hospitality+ <ul style="list-style-type: none"> ▶ Hotels (including casinos, resorts, cruise ships etc.) ▶ Restaurants (also including leisure/entertainment) 	<ul style="list-style-type: none"> ▶ Hilton ▶ McDonalds

The study focuses on POS terminals, as the most reliable and comparable measure of market presence

Product Scope		
Dimension	Included	Excluded
Software type	<ul style="list-style-type: none"> ▶ Main POS application 	<ul style="list-style-type: none"> ▶ Store support software ▶ Ancillary applications (e.g. self-checkout) that build on core POS functionality
Operating system	<ul style="list-style-type: none"> ▶ “Full” versions of Windows (WEPOS, Windows 7/8/10, etc.), Linux, IBM 4690 	<ul style="list-style-type: none"> ▶ Windows CE ▶ Proprietary embedded systems
Hardware devices	<ul style="list-style-type: none"> ▶ Fixed EPOS ▶ Mobile EPOS¹ ▶ Self-service terminals (self-checkouts, kiosks) that process customer transactions 	<ul style="list-style-type: none"> ▶ Back-office and other ▶ Store servers ▶ All other devices not processing customer transactions

¹ Employer devices only – POS functionality on employee (or consumer) devices excluded