

Mobile Self-Scanning and Checkout-Free 2022

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 brand new study of self-service shopping technologies addresses the current lack of data on this dynamic market

A dynamic market for advanced self-service shopping technologies is developing

- ▶ Consumers expect convenient, personalised and speedy shopping experiences
- ▶ To match innovators, retailers need to reduce friction from in-store checkout
- ▶ A diverse range of technologies have been developed to obviate the end-of-shop scanning process, but capabilities and scale of deployment vary dramatically



Technology vendors and other industry stakeholders need intelligence on this market

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

Mobile Self-Scanning and Checkout-Free 2022 provides suppliers with the first comprehensive view of projects around the world

Scope	
Products	Mobile Self-Scanning and Checkout-Free technologies More details on page 4
Geographies	Global data including figures for 23 country markets More details on page 5
Metrics	Number of stores , number of devices ¹
Data	Market size and vendor shares , end-2021 and end-2020
Forecasts	Forecasts for 2022 to 2027, by type of solution and by country
Segmentation	Size of stores : micro (<500 sq ft), small (500-5k sq ft), medium/large (>5k sq ft)
Vendors	70+ across checkout-free technology, mobile self-scanning software and hardware , including AiFi, Amazon, BudgetBox, Capex, Datema, Datalogic, Re-Vision and Zebra

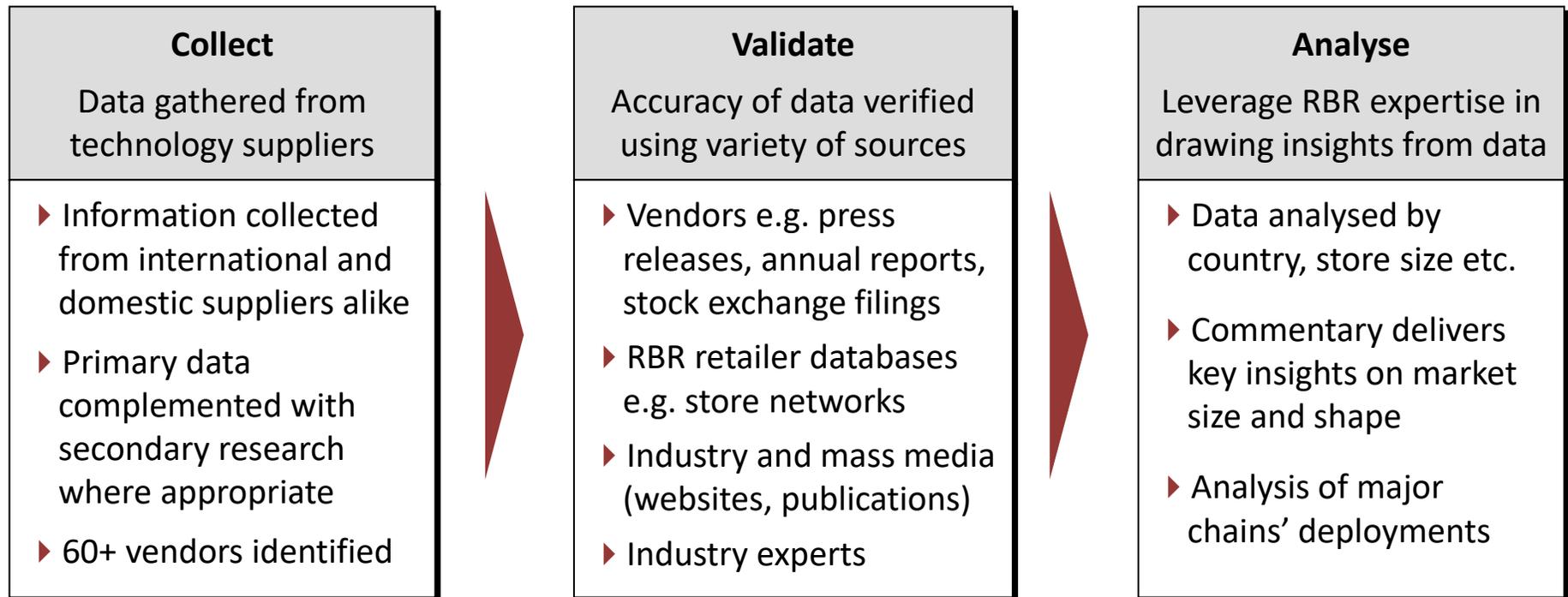
The study addresses technologies that move data capture away from a final “checkout” process

Product Scope		
Dimension	Included	Excluded
Industry	<ul style="list-style-type: none"> ▶ Retail: self-service product selection in a store 	<ul style="list-style-type: none"> ▶ Vending: self-service product selection at a stand-alone machine ▶ Hospitality: self-service or assisted-service ordering; employee fulfilment
Data Capture	<ul style="list-style-type: none"> ▶ Actively – by consumer <ul style="list-style-type: none"> ▪ Mobile self-scanning using retailer- or customer-owned device (including carts) ▪ Alternatives e.g. NFC shelf labels 	<ul style="list-style-type: none"> ▶ Passively – by technology <ul style="list-style-type: none"> ▪ Using any combination of cameras and other sensors (e.g. weight) ▪ Whether at store, shelf, cart or basket level

The study provides global data, including figures for 23 country markets



The study combines primary and secondary research with RBR's in-house data, market understanding and research expertise

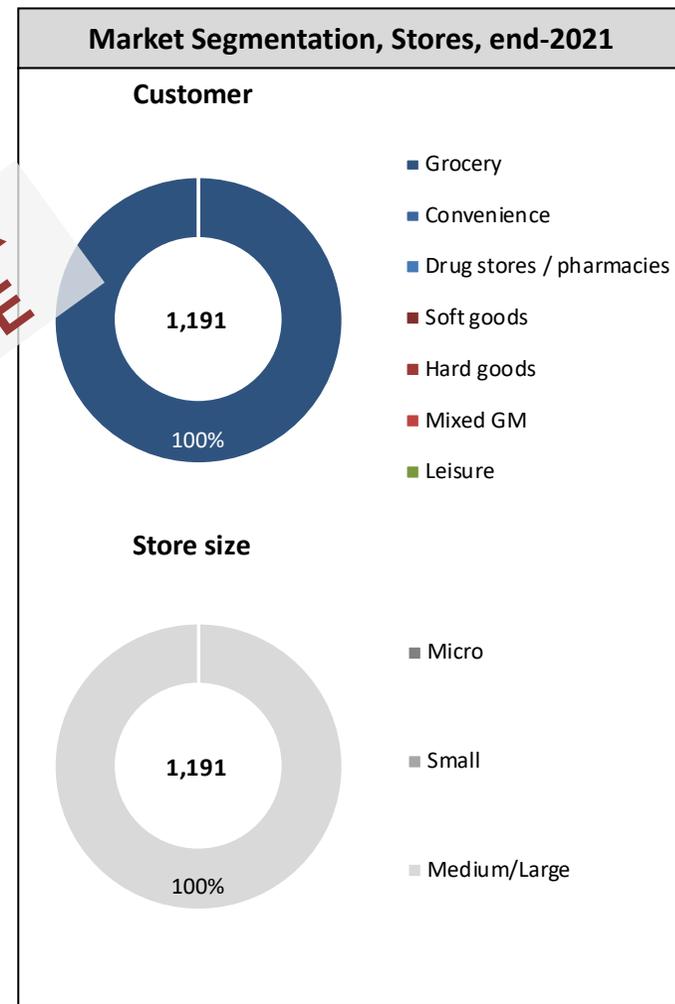
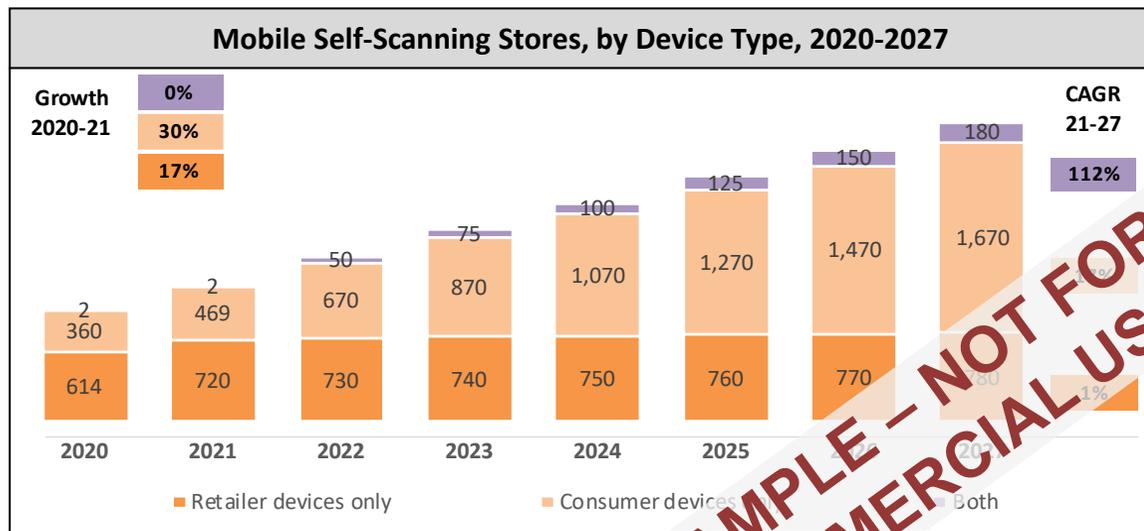


Study clients receive an executive report and a comprehensive market database, plus access to RBR's project team

- ▶ Electronic (multi-user licence) copy of research findings
 - Executive report in PowerPoint containing key market facts and commentary by country
 - Market Database in Excel
- ▶ A conference call presentation of the study results can be organised if desired
- ▶ Privileged access to RBR's senior researchers during and after study
- ▶ The study price is £27,500

*If you have questions, or to place an order, please contact
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The Italian mobile self-scanning market remains less developed than other European markets of comparable size, but potential does exist



Key Insights

- ▶ Compared to other European markets in northern and central Europe, Italy's mobile self-scanning market is less established
 - Growth in 2021 was comparatively slight in absolute terms, with the number of stores offering a scanning service growing from around 1,000 to 1,200
- ▶ By the end of 2027 there are expected to be more than 2,500 stores offering mobile self-scanning in Italy, which would be considered modest given the size of the market overall
 - There were around 11,000 grocery stores in the market overall at the end of 2021, so in theory there is still much potential for growth
- ▶ In 2021 the majority of stores with mobile self-scanning used retailer-provided devices
 - This is expected to change during the forecast period as retailers increasingly roll out the service via smartphones, which at least initially will be viewed as requiring lower investment

The Market Database provides comprehensive market and vendor data by country, including store and device numbers

		MOBILE SELF-SCANNING AND CHECKOUT-FREE 2022													
		Mobile Self-Scanning Software Stores by Vendor, Region and Country (all projects)													
		Confidential - Internal Use Only													
Region	Country	Total	Budgetbox	Datalogic	Dataema	Extenda	FutureProof Retail	Greenware	Intelligent Mail	Intelligent Mail	MishriDay	NCR	Re-Vision	Shopreme	Skip
Americas	Canada	XXXX									X	XXX			
Americas	USA	XX,XXX									XXX	XXX			XXX
Americas	Brazil	XXX													
Americas	Chile	XXX													
Americas	Other	XXXX													
Americas	Total	XX,XXX									XX	XXX			XXX
Europe, Middle East and Africa	France	XXX	XXX								XXX				
Europe, Middle East and Africa	Germany	XXXX						XXXX	XX		XXX		XXXX	XX	
Europe, Middle East and Africa	Italy	XXX									X	XXX		XX	
Europe, Middle East and Africa	Netherlands	XXXX										XXX	XX		
Europe, Middle East and Africa	Poland	XXX									X	XXX	X		
Europe, Middle East and Africa	Russia	XXX													
Europe, Middle East and Africa	Spain	XXX	XX					XXXX			X			XX	
Europe, Middle East and Africa	Sweden	XXX				XX	XXX		XX		XXX				
Europe, Middle East and Africa	UAE	X									XX		X		
Europe, Middle East and Africa	UK	XXXX				XX					XX		XXXX		
Europe, Middle East and Africa	Other	XXXX		XXX	XX		XXX	XXXX			XXX		XXXX	XX	
Europe, Middle East and Africa	Total	XX,XXX	XXX	XXXX	XXX	XX	X	XXXX	XXX		XXXX	XXX	XXXX	XXX	XXXX
All Regions	Total	XX,XXX	XXX	XXXX	XXX	XXX	XXX	XXXX	XXX	XX	XXX	XXX	XXXX	XXX	XXXX

SAMPLE - NOT FOR COMMERCIAL USE

RBR has deep retail industry knowledge, researching a range of store technologies including an annual study of the global self-checkout market

Key Qualifications

- ▶ 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 self-checkout 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

Technology suppliers e.g. Diebold Nixdorf, Fiserv, Fujitsu, HP, IBM, Microsoft, NCR, Toshiba, Zebra

Retailers e.g. Auchan, X5 Retail

Payments firms e.g. American Express, Mastercard, PayPal, Visa

Consultancies e.g. Bain & Company, Boston Consulting Group

Investment banks and investors e.g. Advent International, Elliott Management, Goldman Sachs