Branch Transformation

Sizing today's market, mapping tomorrow's branch



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The Branch Landscape is Changing – Vendors Need the Latest Intelligence

Evolving Bank Requirements: Strategic Positioning is Time-Sensitive

- As branch networks continue contracting, banks are investing heavily in transforming their outlets for maximum impact, creating substantial opportunities
- Technology vendors without detailed market intelligence risk misallocating R&D resources and missing critical opportunities as banks pivot from traditional teller-centric models to advisory and self-service formats
- First-mover manufacturers with superior insights will have an advantage in securing contracts with leading banks

In-Depth Insights That Drive Growth Opportunities

- Our comprehensive research provides granular technology deployment data – installed base trends, preferred terminal types, and required features – enabling precise product roadmap decisions and market entry strategies
- Multi-year shipment forecasts by technology type identify high-growth segments and optimal timing for product launches, helping you capture market share before the transformation window closes
- Case studies leveraging primary research reveal the branch strategies and solutions banks are using now, and how this will change over the next few years

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Unmatched Methodology: Data You Can't Find Anywhere Else

QUANTITATIVE BASELINE

- Unparalleled model of teller assist and assisted self-service adoption
- Consistent baseline built up over more than a decade

TRIANGULATION & VALIDATION

- Cross verification and analysis of data from research
- In-depth investigation to determine scope/completeness of data and adjust for consistency



QUALITATIVE RESEARCH

- In-depth qualitative interviews with banks and other industry participants
- Strategic insights on branch transformation projects
- Branch investment plans and evolving technology requirements, as reported by banks

QUANTITATIVE RESEARCH

- Key quantitative information solicited from industry suppliers
- Ongoing tracking of deployment projects, product launches and new entrants
- Published data from central sources and major players

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BT27 Scope: In-depth data, value-adding insights

Part 1: Market Sizing

Branches, Teller Assist Units and Assisted Self-Service Terminals

- **Market sizing** exercise focusing on **13 key markets***, including the USA
  - **Data collected directly from vendors**: top-down research enables more efficient and comprehensive coverage
  - Coverage of TAUs in front- and back-office of bank branch and post offices
  - Assisted self-service at ATMs segmented by type
- **Vendor profiles (NEW)**
  - Major vendors profiled, including what they offer in the branch transformation space, where they see the future of the sector and who their key clients are

*Database and report: USA, Mexico, Germany, Italy, Spain, UK, Australia, Indonesia, Thailand, Saudi Arabia. Additionally, the database will include Brazil, France, UAE.

Part 2: Case Studies

Branch strategies, alternative solutions, future outlook

- **Case studies** leveraging primary research with banks
  - **Branch strategy**, including future plans and requirements
  - **Integrated branch solutions** covering hardware, software and services
  - **Other technology** used in branches, including financial kiosks and card printing/issuance devices
  - **Alternatives to traditional branch networks**, such as shared infrastructure and banking pods
  - Highlight **cash-handling solutions for businesses** and **bank partnerships with retailers** for cash services
- Common themes drawn out to show **what banks are doing now** and crucially, **where branch banking is headed** over the next few years

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Unrestricted Team Access: Maximising Value Across Your Company



Market Report

- Key market statistics, trends and commentary by country
- Case studies and vendor profiles



Reprint Rights

- Support marketing efforts with rights to selected materials



Market Database

- Comprehensive data easily extracted for further analysis



Video Conference

- Live session to present findings to your organisation and discuss implications



Expert Support

- Subject matter experts to aid understanding of data and underlying assumptions

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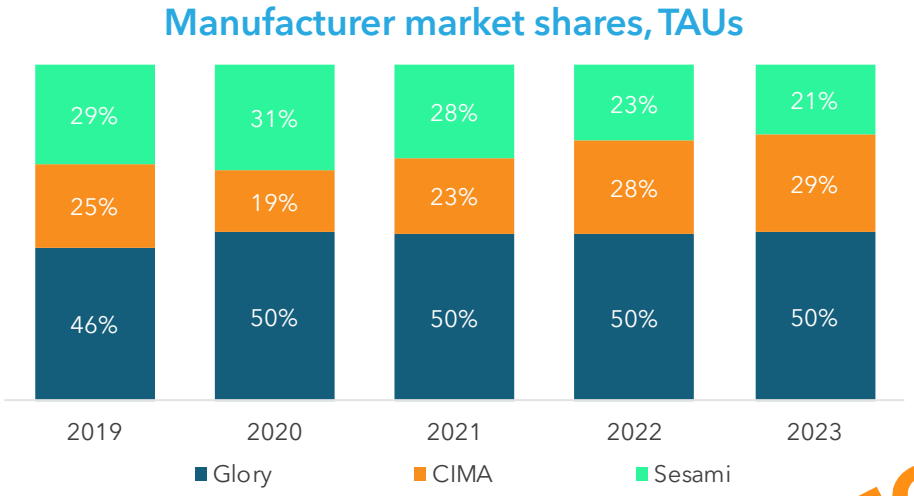
Complete View of Branch Technology Transformation: From Recent Trends to Future Deployment

Branch Transformation Database			
Domain(s)	**Topic**	**Actual Data**	**Forecast Data**
Network Size	Branch numbers by country	2022-2026	2029
	Branch numbers by bank	2026	N/A
	Country TAU installed base by terminal type*	2022-2026	2027-2029
	TAU numbers by terminal type* and deployer	2026	N/A
	Country ASST installed base by terminal type†	2022-2026	2027-2029
	ASST numbers by terminal type† and deployer	2026	N/A
Hardware	TAU supplier market shares by terminal type*	2022-2026	N/A
	TAU shipments forecasts by terminal type*	N/A	2027-2029
	ASST supplier market shares by terminal type†	2022-2026	N/A
	ASST shipments forecasts by terminal type†	N/A	2027-2029

* Teller Cash Recycler (TCR), Teller Cash Dispenser (TCD), Dispenser/Acceptor – coverage of branch back-office TAUs, branch front-office TAUs (teller line and customer-facing) and where relevant, TAUs deployed in post offices
† Remote video assistance, In-person assistance, Dual-function

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Glory has accounted for half of the Portuguese TAU market since 2020, and is the most commonly used vendor



- TAU manufacturer installations by type, 2023

	Total	TCRs	TCDs
Glory	902	857	45
CIMA	524	524	0
Sesami	376	376	0
Total	1,802	1,757	45

Source: RBR Data Services

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- The largest supplier to the Portuguese TAU market is Glory. It has retained a 50% share since 2020
- The absolute number of Glory installations has nevertheless fallen every year since 2021, driven by TCR removals by Montepio and Santander Totta, as well as by TCD removals by Millennium bcp
- In 2023, however, the decline was limited by the return to growth of Millennium bcp's TCR fleet, which is majority-Glory
- Montepio remains the largest deployer of Glory TCRs, which constitute its entire fleet. This vendor is also the most commonly used, with five deployers having Glory terminals in their estates
- There are only two other TAU suppliers to Portugal
- CIMA's share has fluctuated in recent years, but has increased every year since 2021, with deployers choosing to add units from this vendor even as they rationalise their estates as a whole
- Despite several years of contraction of its CIMA-only estate, Novo Banco remains the largest deployer of this vendor's devices
- Sesami (formerly ARCA) has seen its share fall year on year. Total Sesami units remained stable in 2020, and then began to fall
- The largest contributor to the decline was Santander Totta, which has a majority-Sesami estate of TCDs, and remains this vendor's largest deployer
- The fall in Sesami installations was partially offset in 2023 by some new deployment by Millennium bcp

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Market Database Shows TAU and ASST Deployment at Country Level and By Bank

Global Branch Transformation 2024

Installed Base of TCRs by Vendor and Country, 2019-2023

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Source: RBR Data Services

Year	Region	Country	Glory	Sesami	Diebold Nixdorf
2023	Americas	Brazil			
2023	Americas	Canada			
2023	Americas	Mexico			
2023	Americas	USA			
2023	Asia-Pacific	Australia			
2023	Asia-Pacific	India			
2023	Asia-Pac	Indonesia			
2023	Asia-Pac				
2023	Asia-Pac				
2023	EMEA				
2023	EMEA				

Global Branch Transformation 2024

Installed Base and Shipments by Type of ASST and Country, 2018-2028

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Source: RBR Data Services

Device Type	Region	Country	Total ASSTs 2023	2024F	2025F	2026F	2
In-person	EMEA	Spain					
Video	EMEA	Spain					
Dual-function	EMEA	Spain					
Total	EMEA	Spain					

Global Branch Transformation 2024

Bank Data by Country, 2023 (selected banks)

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Source: RBR Data Services

Region	Country	Bank	Branch	TAUs TCRs	TCDs	Disp-acc	Total	In
Americas	Brazil	Banco do Brasil						
Americas	Brazil	Bradesco						
Americas	Brazil	Caixa						
Americas	Brazil	Itaú						
Americas	Brazil	Santander						
Americas	Brazil							

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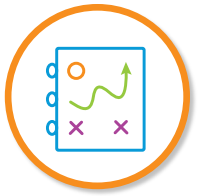
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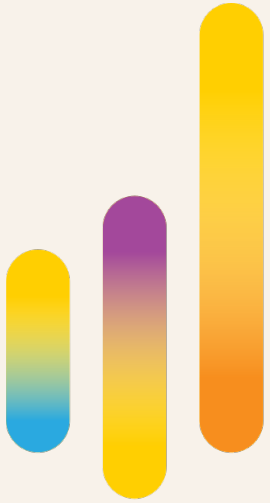
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