Mobile Self-Scanning and Checkout-Free 2023

Executive Report and Market Database

Publication May 2023

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

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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

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Mobile Self-Scanning and Checkout-Free 2023 will provide suppliers with the a 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-2022 and end-2021
Forecasts	**Forecasts** for 2023 to 2028, 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	**80** across **checkout-free** technology, mobile self-scanning **software/hardware**, including AiFi, Amazon, BudgetBox, Cloudpick, Datalogic, Extenda Retail, GK and Zebra

[1] For projects with retailer-owned self-scanning devices

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

Product Scope			
Dimension	**Included**		**Excluded**
Industry	▸ Retail: self-service product selection in a store		▸ Vending: self-service product selection at a stand-alone machine ▸ Hospitality: self-service or assisted-service ordering; employee fulfilment
Data Capture	▸ Actively – by consumer ▪ Mobile self-scanning using retailer- or customer-owned handheld device ▪ Smart cart requiring placement of items within it	▸ Passively – by technology ▪ Using any combination of cameras and other sensors (e.g. weight) ▪ Whether at store or shelf level	▸ Requiring employee re-scanning of some/all items for every customer

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

Americas
- USA
- Brazil
- Canada
- Chile
- Others

EMEA
- France
- Germany
- Italy
- Netherlands
- Poland
- Russia
- Spain
- Sweden
- UAE
- UK
- Others

Asia-Pacific
- Australia
- China
- India
- Japan
- Singapore
- South Korea
- Others

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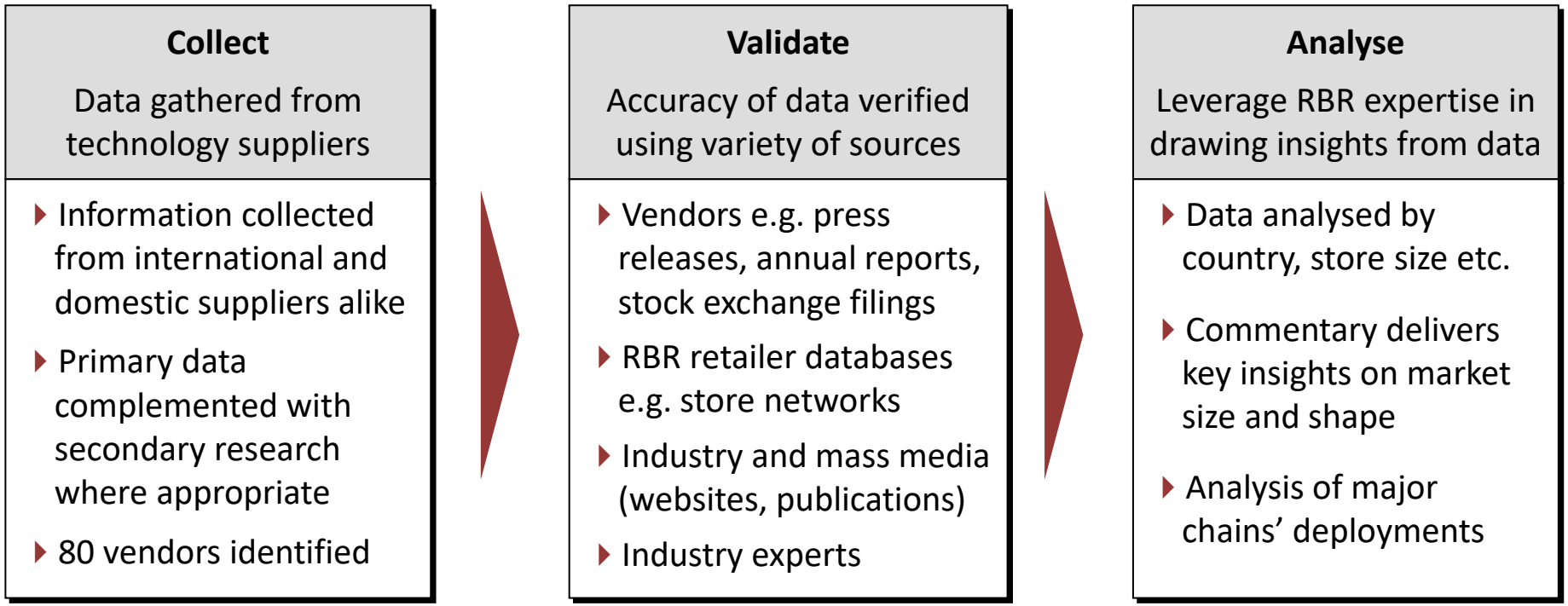
The study combines primary and secondary research with RBR's in-house data, market understanding and research expertise



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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 £30,000

If you have questions, or to place an order, please contact
Tom Hutchings on +44 20 8831 7306 or tom.hutchings@rbrlondon.com

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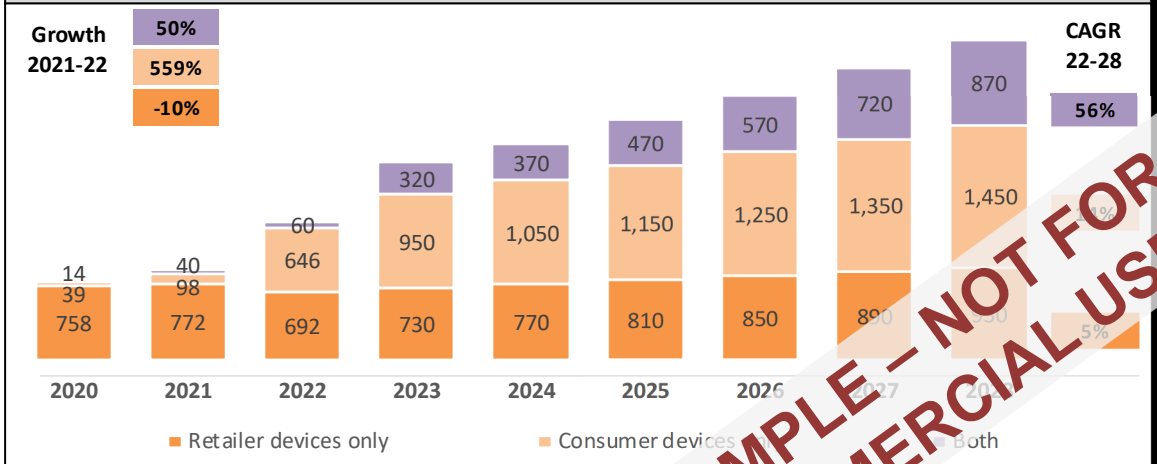
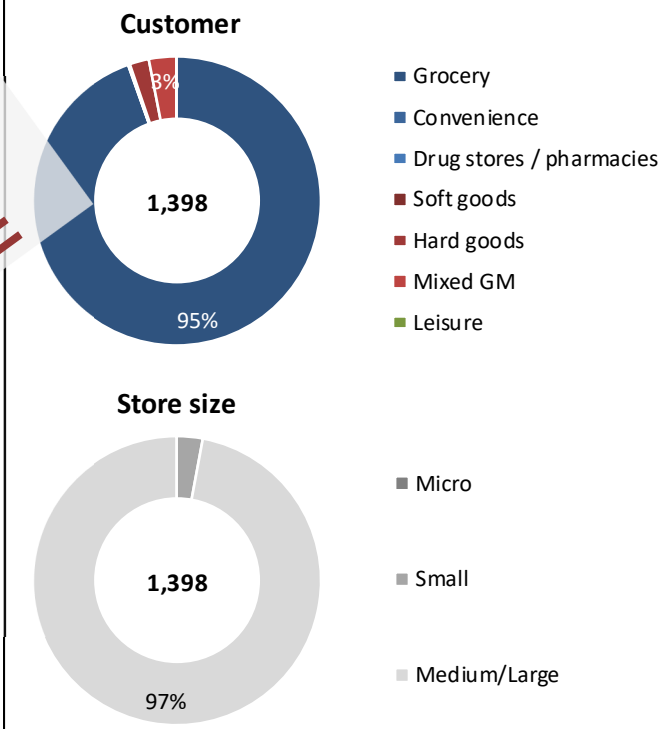
While much of the Swedish market is mature, major retailers are rolling out mobile self-scanning smartphone apps in 2023

Mobile Self-Scanning Stores, by Device Type, 2020-2028



SAMPLE – NOT FOR COMMERCIAL USE

Market Segmentation, Stores, end-2022



Key Insights

- In 2022 the number of stores offering mobile self-scanning in Sweden grew by around 50%
  - This was the result of a large retailer rolling out the service to a significant number of stores via smartphones
- Many legacy projects involving the largest grocery banners and retailer-provided devices remained largely stable
- There is potential for growth in the use of self-scanning in micro-sized and small unmanned outlets serving less populated areas of the country
- By the end of 2028 there are forecast to be around 3,000 stores offering mobile self-scanning
  - Much of this growth will be from stores with retailer-provided devices also offering the service via smartphones, as well as an increase in the number of small, unmanned stores

Carts

Stores offering a cart-based solution: **0**

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

MOBILE SELF-SCANNING AND CHECKOUT-FREE 2023

Mobile Self-Scanning Software Stores, by Vendor, Region and Country (for Retailer- and Consumer-Provided Devices)

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Region	Country	Total	Budgetbox	Datalogic	Datema	Diebold Nixdorf	Fujitsu	MishiPay	Shopreme	Skip	Snabble	Snapp	Toshiba
Americas	Canada												
Americas	USA												
Americas	Brazil												
Americas	Chile												
Americas	Other												
Americas	**Total**												
Europe, Middle East and Africa	France												
Europe, Middle East and Africa	Germany												
Europe, Middle East and Africa	Italy												
Europe, Middle East and Africa	Netherlands												
Europe, Middle East and Africa	Poland												
Europe, Middle East and Africa	Russia												
Europe, Middle East and Africa	Spain												
Europe, Middle East and Africa	Sweden												
Europe, Middle East and Africa	UAE												
Europe, Middle East and Africa	UK												
Europe, Middle East and Africa	Other												
Europe, Middle East and Africa	**Total**												
All Regions	**Total**												

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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

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