

# Mobile Point-of-Sale

## Market Report and Database



RESEARCH OVERVIEW

# Published and bespoke research from RBR Data Services enables strategic planning across banking, payments and retail sectors

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Its global research covers the cards and payments, retail technology and banking automation sectors and is used by leading market participants, analysts and regulators as the authoritative source of industry and competitor benchmark data.

Datos Insights is the advisor of choice to the banking, insurance, securities, and retail technology industries – both the financial institutions and the technology providers who serve them. We help our clients make better technology decisions so they can protect and grow their customers' assets.

For more information, visit [www.datos-insights.com](http://www.datos-insights.com)

## Contact

Datos Insights  
393 Richmond Road  
London TW1 2EF, UK  
[rbr@datos-insights.com](mailto:rbr@datos-insights.com)

# RBR Data Services' new study on mobile point-of-sale delivers reliable data and insights on this dynamic international market

## Suppliers lack high-quality intelligence on the market for mobile point-of-sale solutions

- Enterprise retailers and restaurant operators want agile POS technology to optimise CX, supporting customer journeys like clienteling, in-aisle/at-table service and kerbside pick-up
- SMBs seek more flexible, cost-effective point-of-sale solutions
- Technology suppliers need greater, in-depth intelligence on this diverse, growing market

## RBR Data Services' research provides unparalleled market and competitive intelligence

- Understand market size, shape and future growth, to identify and assess opportunities
- Discover competitive landscape by geography, customer and product segment
- Provide authoritative, independent substantiation of market presence in marketing collateral

# Mobile Point-of-Sale covers solutions used in retail and hospitality outlets with full point-of-sale functionality

## Software

- Aptos
- Diebold Nixdorf
- Enactor
- Extenda Retail
- Flood
- GK Software
- JumpMind
- Lightspeed
- Revel Systems
- Shopify
- Square Point of Sale
- Veras Retail

## Hardware

Elo, HP, NCR Voyix,  
Oracle, Posiflex, Zebra

**Commercial-grade\***  
battery-powered

Apple, Samsung

**Consumer-grade‡**  
battery-powered

Clover Station,  
Square Register

**Wall-powered**

**Payment-only devices excluded e.g. Square Reader**

\* Retail-hardened hardware, designed for point-of-sale use

‡ General-purpose hardware

# Mobile Point-of-Sale provides vendor and market data, commentary and unique insights for ten countries

## Scope

<b>Geographies</b>	Data for <b>10 key country markets</b> : USA, Canada, Brazil, France, Germany, Spain, UAE, UK, Australia, Japan
<b>Segments</b>	Three customer segments: grocery, general merchandise and hospitality Screen size: <7", 7"-11", >11"
<b>Vendors</b>	<b>50+ suppliers</b> across hardware and software
<b>Metrics</b>	Live <b>installations</b> , new <b>shipments</b> , USD hardware <b>expenditure</b>
<b>Dates</b>	Actual data for year ending December <b>2023</b> ; <b>forecasts for 2029</b>

# The study covers employer-provided mobile hardware and software with full point-of-sale functionality

## Product Scope

Dimension	Included	Excluded
Software Capabilities	<ul style="list-style-type: none"> <li>Full point-of-sale functionality (item-level)</li> </ul>	<ul style="list-style-type: none"> <li>Payment-only functionality</li> <li>Not used for point-of-sale transactions</li> </ul>
Format	<ul style="list-style-type: none"> <li>Retail or hospitality sector</li> </ul>	<ul style="list-style-type: none"> <li>Other verticals e.g. manufacturing, health</li> </ul>
Hardware Ownership/Deployment	<ul style="list-style-type: none"> <li>Company-owned for professional purposes only</li> </ul>	<ul style="list-style-type: none"> <li>Associate- or consumer-owned devices</li> <li>Company-owned devices for hybrid professional/personal use</li> </ul>

# The study methodology builds on our expertise in large-scale, global studies, designed to ensure comparability and reliability

## Collect

Data gathered from all major vendors

- RBR Data Services solicits information from industry suppliers
- Primary data complemented with secondary research
- Overall 50+ vendors covered

## Validate

Accuracy of claims verified using variety of sources

- Insights from RBR's range of retail technology studies
- Expertise on the global payments market
- Annual reports/stock exchange filings and press releases

## Analyse

Leveraging RBR expertise in drawing insights from data

- Data analysed by country, vendor, etc.
- Report commentary highlights major projects
- Insights for grocery, general merchandise and hospitality

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

# Ease of use, and access to RBR experts, maximises value across your organisation

Deliverables collectively address clients' core market intelligence needs



## Market Report

- Key market statistics, trends and commentary by country
- Regional and global comparative analyses
- Familiar PowerPoint format facilitates re-use of material



## Market Database

- Excel format enables use across your organisation
- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis



## Video Conference

- Live session to present findings and discuss implications



## Analyst Access

- Ongoing access to senior RBR Data Services experts

Study pricing

£30,000

Contact us:

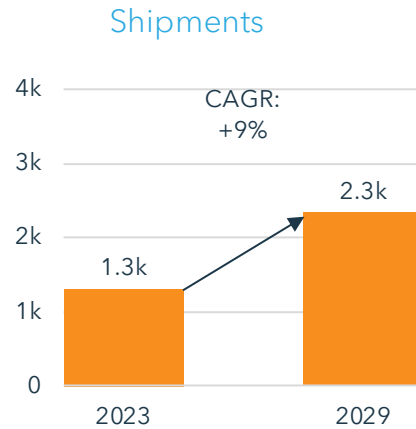
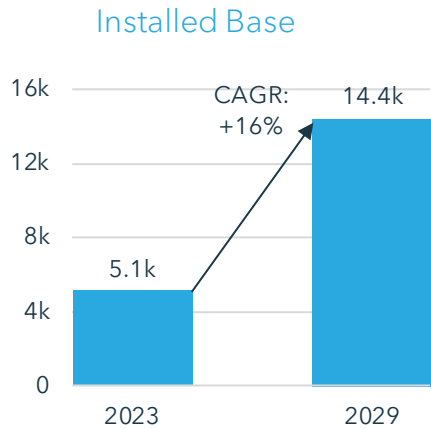
+44 20 8831 7300

[rbr@datos-insights.com](mailto:rbr@datos-insights.com)



# The UAE mobile POS market has strong growth potential with numerous hospitality and retail chains deploying the technology

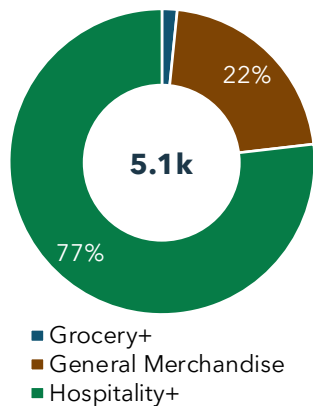
## Market Size



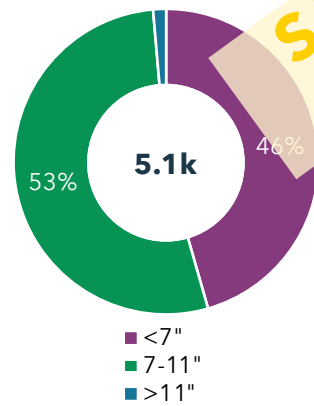
## Key Insights

- There were 5,100 mobile POS devices deployed in the UAE at the end of 2023, with around 1,300 units shipped during the year
- Most installations are found in the hospitality sector, with restaurants deploying tablet, smartphone and Android smart POS devices
  - Starbucks uses a tablet-based solution in the UAE to provide table service; P.F. Chang's and other restaurant chains have also introduced tablets for tableside POS
  - Many restaurants use handheld Android smart POS devices which they purchase from credit card acquirers
- Several major general merchandise retailers in the UAE have deployed smartphone or tablet-based POS solutions
  - Local big-box electronics retailer Sharaf DG rolled out mobile POS devices across all 40 of its stores in 2018
  - Clothing chains Adidas and Ralph Lauren and makeup firm MAC Cosmetics have also adopted the technology
  - Other global retailers using mobile POS solutions at their stores in the UAE include Apple and LEGO
- A major Emirati retail group has plans to introduce mobile POS at some of its fashion brands in 2024
- The total installed base in the UAE is forecast to exceed 14,000 units by 2029

## Customer Segment, 2023



## Screen Size, 2023



SAMPLE - NOT FOR COMMERCIAL USE

# The Market Database provides market and vendor data for ten countries, including installations, shipments and segmentation

**Mobile Point-of-Sale 2024**  
**Market Hardware Installs by Vendor, Screen Size, Country and Segment, 2023**  
 Confidential - Internal Use Only  
 Source: RBR Data Services

Screen Size	Country	Segment	Total	Apple	Clover	Elo	Google	Honeywell	HP	Ingenico	Microsoft	Neom (IPT)	PAR	PAX	Technology	Samsung	Shopify	Square	Sunmi	Toast	Unitech	Zebra	
All	Australia	Total																					
All	Japan	Total																					
All	USA	Total																					
All	Canada	Total																					
All	Brazil	Total																					
All	France	Total																					
All	Germany	Total																					
All	Spain	Total																					
All	UK	Total																					
All	UAE	Total																					
All	Total	Total																					
All	Australia	Grocery+																					
All	Japan	Grocery+																					
All	USA	Grocery+																					
All	Canada	Grocery+																					
All	Brazil	Grocery+																					
All	France	Grocery+																					
All	Germany	Grocery+																					

**SAMPLE - NOT FOR COMMERCIAL USE**

# RBR Data Services has deep retail and hospitality industry knowledge, researching various store technologies

## Key Qualifications

- **35 years' experience** delivering international market research to diverse blue-chip client base
- **Expertise** in hardware, software and services
- **Dedicated EPOS and self-checkout hardware research** since 2008
- **Strong understanding of general and technology trends** in retail and hospitality industries
- **Reputation for premium, independent syndicated research** studies funded by industry suppliers

## Types of client

- **Technology suppliers** e.g. Diebold Nixdorf, Epson, Fiserv, Fujitsu, Glory, HP, Microsoft, NCR Voyix, Toshiba, Zebra
- **Retailers** e.g. Auchan, X5 Retail
- **Payment firms** e.g. American Express, Mastercard, Visa
- **Consultancies** e.g. Bain & Company, Boston Consulting Group
- **Investment banks and investors** e.g. Advent International, Elliott Management, Goldman Sachs



datos

INSIGHTS