

MARKET STUDY:

2010 Syndicated Research Price List

Analysts

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5. All requests requiring written approval should be submitted to ihl@ihlservices.com and will be reviewed within one business day.

For any questions regarding this policy, please contact us at 615-591-2955 or email us at ihl@ihlservices.com.



Who We Are

IHL Group is a global research and advisory firm specializing in technologies for the retail and hospitality industries. The company, based in Franklin, Tenn., generates timely data reports, offers advisory services and serves as the leading retail technology spokesperson for industry and vendor events.

What We Do

IHL provides customized business intelligence for retailers and retail technology vendors, with particular expertise in supply chain and store level systems. Our customers are retailers and retail technology providers who want to better understand what is going on in the overall technology market, or wish to identify specific equipment needs for the retail market.

When We Started

Greg Buzek served as Product Development Manager for two Fortune 500 retail technology suppliers for 6 years. Faced with making recommendations to senior management with spotty reports stuffed with technical jargon and unsubstantiated data, in 1996 he left to form IHL Group as an arms length consulting firm that delivers exacting research to corporate managers.

How We Work

Reliable market analysis is essential for corporations to accelerate revenue and expand their market share. Most research providers do not disclose data sources or statistically defend the validity of their assumptions. We do. We disclose in precise detail exactly how and why we reached our conclusions so that our customers can be comfortable with the data they are using.

What We Know

Our associates and advisors have over 100 years combined years of retail technology experience. Our associates have worked as product managers, sales representatives and executives in the retail market. We have the relationships, tools, and experience to meet your research and consulting needs.

Research Reports – Individual Pricing

Item	Price
<p>Asia/Pacific Electronic Point-of-Sale POS Terminal Study</p> <p>In this study we explore the market climate for POS terminals in the Asia/Pacific region. It includes shipment, installed base and trends analyses for POS in Japan, China, Australia/New Zealand, South Korea, Hong Kong, Southeast Asia and Other Asia/Pacific countries. More than just numbers without explanation, this report goes deep into discussion of retailing in the segments in these countries to reveal the forces that are shaping POS purchase decisions. Additionally, the report covers emerging trends and influences that affected the market in 2009, and it includes an estimated value for shipments and installed base and estimates for shipments and installed base through 2013. Note that this is not a vendor market share report (other than operating systems and processor types), but rather a fresh look at the state of POS technology in the world's fastest growing market.</p>	\$2,995
<p>North American Retail POS Terminal Study</p> <p>Our marquis POS Report, this study focuses on the retail POS market in the United States and Canada in its entirety. It includes shipment, installed base and trends analyses of POS devices based on processor speed and operating system choice by retail segment. Additionally, the report covers emerging trends and influences that affected the market in the past calendar year and those that will help form market decisions in the future. Finally, it includes a 5-year forecast for shipments and installed base.</p>	\$2,995
<p>Europe/Middle East/Africa POS Terminal Study</p> <p>A review of POS terminal shipments and installed base in Europe/Middle East/Africa by retail segment and country. This is similar in format to the North American Report. It includes shipment, installed base and trends analyses of POS devices based on processor speed and operating system choice by retail segment. Additionally, the report covers emerging trends and influences that affected the market in the past calendar year and those that will help form market decisions in the future. Finally, it includes a 5-year forecast for shipments and installed base.</p>	\$2,995
<p>Latin/South American POS Terminal Study</p> <p>A review of POS terminal shipments and installed base in Latin/South America by retail segment and country. This is similar in format to the EMEA and Asia/Pacific studies. It includes shipment, installed base and trends analyses of POS devices based on processor speed and operating system choice by retail segment. Additionally, the report covers emerging trends and influences that affected the market in the past calendar year and those that will help form market decisions in the future. Finally, it includes a 5-year forecast for shipments and installed base.</p>	\$2,995

Item	Price
<p>North American Hospitality POS Terminal Study</p> <p>This report focuses on the Hospitality POS market in the United States and Canada for Bar/Restaurants, Fast Food, Lodging, Casinos and Cruises, and Entertainment (Theme Parks, Stadiums, Theaters, etc) It includes shipment, installed base and trends analyses of POS devices based on processor speed and operating system choice. Additionally, the report covers emerging trends and influences that affected the market this past year and those that will help form market decisions in the future. It also includes a forecast for shipments and installed base for the next 5 years.</p>	<p>\$1,695</p>
<p>North American Retail POS Printer Study</p> <p>This 56-page report focuses on the housed receipt printer market for retail POS devices in North America. It details the market shipshare, distribution channels and installed base for the top printer vendors doing business in the region and provides for market projections based on changing technologies and changing distribution philosophies through the next 5 years. This report would allow you to choose the appropriate printer partner as you proceed with your POS initiatives.</p>	<p>\$2,695</p>
<p>Retail Self-Checkout Systems in North America</p> <p>This report looks at arguably the hottest store-level retail technology of today, the Self-Checkout System. Within its pages this report reviews the customer acceptance of the technology. What are the likes and dislikes of self-checkout? How does the technology affect impulse purchases at the POS? Do certain brands of items do better or worse at self-checkout? This is designed for retailers, vendors, and CPG manufacturers.</p>	<p>\$1,995</p>
<p>Self-Service Kiosks in North America</p> <p>This report looks at arguably one of the more explosive yet most difficult areas to define in the IT sector - namely Self-Service Kiosks. Key to any review of Kiosks is a definition of what types of kiosks that are included in the report. In this study we ventured beyond retail in the breadth of our discussion, but focused only on those devices where payment is currently or soon to be taken. As a result, we came up with the following 5 categories: Self-Checkout, Ticketing Kiosks, Check-In Kiosks, Deli Kiosks, and Food Ordering Kiosks. This report provides market sizing by units and transaction value as well as forecasts for shipments and installed base for the next 5 years.</p>	<p>\$995</p>
<p>Best of Breed Application Analysis – Retailer Guides</p> <p>These reports focus on the best of breed software applications and the Top Suppliers of those applications in North American Retail. Leveraging our Retail/Hospitality Technology Database, we review the top suppliers in each category, the applications they provide, the platforms they support and the customers where they are installed. Taking it a bit further, we also focus on the complementary systems that must be installed with these applications and what systems have been interfaced to their applications already. Currently available reports are the following:</p> <ul style="list-style-type: none"> • POS Software for Hard Goods Retailers • POS Software for Soft Goods Retailers 	<p>\$795 each</p>

Item	Price
<p>IT and the North American Supermarket</p> <p>This 108-page report investigates the challenges of the North American Supermarket Retailer and how Information Technology can be utilized to meet those challenges. Our focus in this report is to provide an education to people that might have a product, service, or technology they would wish to sell into the Supermarket Industry and need to understand the issues and technologies that are in play in this segment.</p>	\$1,495
<p>RIS NEWS/IHL Consulting Group Study “The Shopper-Centric Store”</p> <p>This joint RIS News/IHL Group 2010 Store Systems Study offers the industry’s first look at how IT budgets and spending trends are currently shaping up for retailers based on the responses from almost 100 IT leaders and executives. In this 70+ page analysis which includes a spreadsheet of the detailed results, we tackle subjects such as the following:</p> <ul style="list-style-type: none"> • Store IT Spend trend broken out by hardware, software, services and labor/overhead budget pools. • Estimates of IT Spend Growth • A look at IT Priorities for 2010 • The impact of software licensing increases on software decisions • The impact that the current credit markets are having on purchasing decisions • A look at software architecture and how those trends have changed over the past three years and currently impacting purchasing decisions • POS Software, Hardware and Peripheral planned purchase trends over the next few years • Which POS software vendors are currently under consideration, by whom and how their mindshare has been impacted over the last three years • Which Loss Prevention technologies are under consideration for purchase and was does LP spending look like over the coming year • Which Workforce Management (WFM) technologies are under consideration for purchase and was does LP spending look like over the coming year • What Mobile Initiatives are in place for 2010? 	\$3,500
<p>What’s the Deal with Out-of-Stocks?</p> <p>Building upon previous research from IHL, this research study looks at the true cost of out-of-stocks to retailers. In this study we name names, looking at specific retailers and the consumer's experience with out-of-stocks when shopping their stores. Beyond just looking at empty shelves, this report brings clarity on the size of the out-of-stock problem that heretofore had been missing in the industry.</p>	\$1,995

Research Spreadsheets/Models

Item	Price
<p>North American POS – Small/Medium Businesses Sizing</p>	<p>\$4,000</p>
<p>Sold in conjunction with the North American Retail POS Terminal Study, this sizing spreadsheet provides the sizing of the POS hardware and software market for North America. This includes a breakdown of the data by the following retail segments and company sizes.</p>	<p>alone or</p>
<p>Segments include the following:</p>	<p>\$2,500</p>
<ul style="list-style-type: none"> • <i>Food/Grocery</i> • <i>Drug Stores</i> • <i>Convenience/Gas</i> • <i>Warehouse Clubs/Supercenters/Mass Merchants/Discounters</i> • <i>Department Stores</i> • <i>Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.)</i> • <i>Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.)</i> • <i>Fast Food</i> • <i>Bar/Table Service Restaurants</i> • <i>Lodging</i> • <i>Entertainment – Casinos and Cruises</i> • <i>Entertainment – Other (Stadiums, parks, museums)</i> 	<p>with</p> <p>NA POS</p> <p>Study</p>

Each segment is broken down by the following company sizes: 1 Store, 2-9 Stores, 10-49 Stores, 51-100 Stores, 101-300 Stores, 301-500 Stores, 500-1000 Stores, Over 1,000 Stores.

Item	Price
<p>North American POS Software – Small/Medium Businesses Sizing</p>	<p>\$7,500</p>
<p>Sold in conjunction with the North American Retail POS Terminal Study, this sizing spreadsheet provides the sizing of the POS software market for North America by the top 80 vendors. This includes a breakdown of the data by the following retail segments and company sizes.</p>	<p>alone or</p>
	<p>\$4,000</p>
	<p>with</p>
	<p>NA POS</p>
	<p>Study</p>

Segments include the following:

- Food/Grocery
- Drug Stores
- Convenience/Gas
- Warehouse Clubs/Supercenters/Mass Merchants/Discounters
- Department Stores
- Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.)
- Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.)
- Fast Food
- Bar/Table Service Restaurants
- Lodging
- Entertainment – Casinos and Cruises
- Entertainment – Other (Stadiums, parks, museums)

Each segment is broken down by the following company sizes: 1 Store, 2-9 Stores, 10-49 Stores, 51-100 Stores, 101-300 Stores, 301-500 Stores, 500-1000 Stores, Over 1,000 Stores.

RAPID Project Toolkits

Item	Price
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RAPID POS Project Toolkit

Developed in partnership with C-CORE Consulting Group, Inc., the **RAPID POS Project Toolkit** is a methodology to facilitate POS hardware and/or software replacement for retailers. As most retailers keep their POS systems 5-15 years, the people that were involved in the last POS planning exercise are usually no longer available for this next generation project. In addition there are undocumented features that have crept into the current system that need to be included and a new vision for what the latest technology can provide is required. The **RAPID POS Project Toolkit** is comprised of templates and tools for RAPID scope definition of a project, development of an RFP using the standard NRF-ARTS framework, vendor selection and project execution. In addition each license of the toolkit comes with 5 days of training and consulting from our team of POS experts. The combined offering of the toolkits and our team of experts will result in a typical **12 week reduction** in the RFP process while ensuring all functional requirements and vendor selection occurs via a comprehensive and thorough process.

Contact Us for Details

Contact us at ihl@ihlservices.com for details.

RAPID Workforce Management Project Toolkit

Developed in partnership with C-CORE Consulting Group, Inc., the **RAPID Workforce Management Project Toolkit** is a methodology to facilitate Workforce Management implementations. Today's Workforce Management systems can be as complicated as ERP installations. Truly getting the power out of your system requires good planning up front, with business unit input. The RAPID Workforce Management Toolkit provides the structure and processes to implement a solid workforce management solution that can improve the customer experience, increase employee loyalty and increase profits.

Contact Us for Details

Contact us at ihl@ihlservices.com for details

Data/Business Intelligence Services

Item	Price
<p>Sophia - Entry Level Retailer/Hospitality Online PDF Profiles - North America</p> <p>This level of access to Sophia – Wisdom for Retail is designed for those customers who only plan to utilize the 750 Top Retailer Profile Reports on our website. It provides for a customer login that can be used to access the latest information on specific retailers in pre-defined reports. This entry level access only provides for defined reports that we have online.</p>	<p>\$3,000 annually</p>
<p>Sophia – Full Retail Data Access – North America</p> <p>Named after the Greek word for wisdom, Sophia is by far the most comprehensive source of not just data, but key wisdom for smart decisions in the retail industry. It is the only data service that links IT spend, to specific technology, to specific personnel, to specific financial results, tied together and backed by our advisory staff. Accessed online through the MyIHL link, Sophia provides insight into nearly 200 types of hardware/software/services and key personnel for over 2,850 retailers and restaurants. Your enterprise subscription allows everyone in your organization to create targeted mailing lists of key executives, do competitive analysis, look up market share and understand IT spend for an individual retailer or thousands of companies.</p>	<p>See Description</p>
<p>Pricing is based on # of Segments included and is an annual enterprise unlimited use subscription for your company.</p>	
<ul style="list-style-type: none"> • <i>Each Segment - \$2,000 annually (or \$167 per month per segment on a credit card)</i> • <i>All Segments - \$13,000 annually total</i> 	
<p>Segments include the following:</p>	
<ul style="list-style-type: none"> • <i>Food/Grocery</i> • <i>Drug Stores</i> • <i>Convenience/Gas</i> • <i>Warehouse Clubs/Supercenters/Mass Merchants/Discounters</i> • <i>Department Stores</i> • <i>Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.)</i> • <i>Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.)</i> • <i>Fast Food</i> • <i>Bar/Table Service Restaurants</i> • <i>Lodging, Gaming, Entertainment</i> 	

Contact us at ihl@ihlservices.com for a free demo and 14 day free trial.

Item	Price
<p>Sophia – Full Retail Access for Europe</p> <p>Using the same system as the North American Sophia system, we track over 200 different technologies as well as key personnel across top retailers in Europe. The system in total has nearly 775 top retailers and their hardware, software, services, IT spend and key personnel.</p> <p>Pricing is based on # of Segments included and is an annual enterprise unlimited use subscription for your company.</p> <ul style="list-style-type: none"> • Each Segment - \$2,000 annually (or \$167 per month per segment on a credit card) • All Segments - \$8,500 annually total <p>Segments include the following:</p> <ul style="list-style-type: none"> • Food/Grocery • Drug Stores • Convenience/Gas/Forecourt • Hypermarkets/Mass Merchants • Department Stores • Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.) • Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.) 	<p>See Description</p>
<p>Sophia – Retailer Access – North America</p> <p>This is the same base system as the vendors use, but packaged specifically for retailers.</p> <p>Tools include: Solution Finder, Quick Market Share, Technology Vendor Database, Query Builder</p>	<p>\$3,000 annually</p>
<p>Base Pricing is based on one of the following segments included and is an annual enterprise unlimited use subscription for your company.</p> <p>Segments include the following:</p> <ul style="list-style-type: none"> • Food/Grocery • Drug Stores • Convenience/Gas • Warehouse Clubs/Supercenters/Mass Merchants/Discounters • Department Stores • Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.) • Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.) • Fast Food • Bar/Table Service Restaurants • Lodging, Gaming, Entertainment 	

Item	Price
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Technology Vendor Database - Worldwide

Similar to the information on the retailers and restaurants, we also are tracking hundreds of technology vendors, their customers and solutions. This database allows users to pull technical profiles of hardware, software, and services vendors based on the offerings that they have. Linked with the Retailer/Hospitality database, users can link directly from a query or profile for a retailer for additional technical information on that vendor.

**\$2,500
Annually**

Sophia for Manufacturing

Similar to the information on the retailers and restaurants, we also provide the same type of information for thousands of manufacturers.

**See
Description**

Pricing is based on # of Segments included and is an annual enterprise unlimited use subscription for your company.

- *Each Segment - \$2,000 annually (or \$167 per month per segment on a credit card)*
- *All Segments - \$10,000 annually total*

Segments include the following:

- *Food/Beverage/Tobacco*
- *Apparel, Shoes, Jewelry*
- *Hard Goods*
- *Electronics, Recreation*
- *Pharmaceuticals*
- *Automotive*

IT Sizing Services

Item	Price
Retail WorldView IT Sizing	Contact Us

Retail WorldView is IHL's IT Sizing model for the worldwide retail marketplace. With over 100 categories of hardware, software, services, and labor/overhead, Retail WorldView is the most comprehensive IT sizing model in the retail industry. Retail WorldView is available for purchase by region, segment or as a complete worldwide view. Whether you are vendor with an application in one area or you have a broad portfolio of products, Retail WorldView is designed to show you where the opportunities are today in each region worldwide and can be customized specifically for your company's needs looking forward.

The IT sizing is calculated in US Dollars for the following regions.

- North America (US and Canada)
- Latin and South America (including Mexico and Caribbean)
- Europe/Middle East/Africa
- Asia/Pacific

Hardware, Software, Services, and Labor/Overhead for the following Line of Business Categories:

- Store Systems
- Commerce Solutions
- Enterprise Accounting, Finance, and HR
- Enterprise Application Development
- Enterprise Collaboration
- Infrastructure
- Legal and Real Estate
- Merchandise/Supply Chain Management
- Sales and Marketing
- Business Intelligence

Segments offered in the model

- Food/Grocery
- Drug Stores
- Superstore/Warehouse Clubs/Hypermarkets
- Mass Merchants
- Department Stores
- Specialty Hard Goods

- Specialty Soft Goods
- Convenience/Gas/Forecourt

Retail WorldView is a custom service. Although the complete model is available, we have found that customers want something that is customized to their needs. This might be a deeper dive into certain areas or a subset of information only. For this reason it is best to see the model demonstrated.

Subscriptions

Item	Price
<p>Platinum Level Subscription</p> <p><i>The Platinum level subscription foregoes all the individual pricing and you get it all. <u>Every syndicated research report and Sophia for North America and Europe</u> (does not include WordView, RAPID Project Toolkits or Analyst on Call.) Whenever IHL releases one of these reports, we send it directly to your organization. All reports and databases are enterprise-wide electronic licenses. Platinum Level subscribers also help us prioritize which segments and which technologies to evaluate and report on going forward. As with the other subscriptions, there is password access to all reports on our web site and the databases updated monthly.</i></p>	<p>\$46,000 annually</p>
<p>Analyst on Call</p> <p>Sometimes you just need an outside voice/head to run your plans through. With the Analyst on Call function, it can work as an ad hoc event or on a monthly retainer (charged quarterly in advance).</p>	<p>See Description</p>

Two options are available:

Ask the Analyst – Up to two hours (one time) for \$500 (paid by credit card).

Analyst on Call – In blocks of 5 hours per month with one of our senior analysts. \$1,000 for each block of 5 hours.

Item	Price
Custom Research/Consulting	TBD

IHL offers a wide range of custom research and consulting services to fit your organization’s specific needs. Key areas of expertise include the following areas:

- Market Analysis (Global or Domestic markets)
- Due Diligence/Acquisition Analysis
- RFP and Vendor Negotiations
- Services Marketing and Development
- Custom Research and Analysis

Projects are bid on a per project basis or time and materials as required. For more information, please contact us at ihl@ihlservices.com.

Speakers Bureau

Do you need a keynote speaker who can address retail and technology trends? Are you looking for insight into new technologies and growth strategies? Are you looking for better understanding of who is competing well with Wal-Mart?

If so, let us introduce you to the IHL Consulting Group Speaker's Bureau.

IHL's leadership team addresses audiences of senior level industry executives at corporate events and trade association conferences throughout the year. Our team has presented at some of the largest trade shows in the industry, including the National Retail Federation (NRF), Global POS Summit, and others. We have also provided keynote presentations for internal and external sales meetings for companies such as Visa USA, Epson, 360 Commerce, Torex, BlueCube, Agilysys, Fujitsu Transaction Solutions, Go Software, Paymentech and others.

Attendees come to hear what IHL consultants have to say about the latest research in retail trends and technologies. We present hard data from solid primary research so that our clients can make smarter decisions. We have a wealth of research data to pull from for the development of customized presentations for your company. We can also provide competitive reviews of the market and serve as a sounding board for your company's strategies in the market.

Contact us for more detail at +1.615-591-2955 or at ihl@ihlservices.com

The Fine Print

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5. All requests requiring written approval should be submitted to ihl@ihlservices.com and will be reviewed within one business day.

For any questions regarding this policy, please contact us at 888-IHL-6777 or email us at ihl@ihlservices.com

We accept Credit Card Payments on Visa, MasterCard and American Express. For international orders we offer wire transfer options. For domestic orders above \$1,000 we will accept Purchase Orders from approved companies.

All pricing contained herein is valid as of the publication date and supersedes any pricing from previous price lists.

IHL Group Research Order Form

Products

Asia/Pacific Electronic POS Terminal Study	\$2,995
North American Retail POS Terminal Study	\$2,995
Europe/Middle East/Africa POS Terminal Study	\$2,995
Latin/South America POS Terminal Study	\$2,995
North American Hospitality POS Terminal Study	\$1,695
North American Retail POS Printer Study	\$2,695
Retail Self-Checkout Systems in North America.....	\$1,995
What's the Deal with Out-of-Stocks?	\$1,995
Self-Service Kiosks in North America.....	\$995
POS Software for Soft Goods Retailers – A Retailer's Guide.....	\$795
POS Software for Hard Goods Retailers – A Retailer's Guide	\$795
IT and the North American Supermarket	\$1,495
Sophia – Online Introductory Purchase North America	\$3,000
RIS News/IHL Group Store Systems Study “Shopper-Centric Store”	\$3,500
Sophia – Wisdom for Retail Full Access for North America.....	\$13,000
<i>\$2,000 annual per segment or \$167 per segment per month</i>	
Technology Vendor Database -One Time Purchase	\$2,500
Sophia – Wisdom for Retail Retailer Access.....	\$3,000
<i>Includes 2 segments. \$1,500 for each additional segment or \$125 per month</i>	
Sophia – Wisdom for Retail Full Access for EMEA	\$10,500
<i>\$2,000 per segment annual or \$167 per segment per month</i>	
Sophia for Manufacturing.....	\$10,000
<i>\$2,000 per segment annual or \$167 per segment per month</i>	
Other Please describe _____	

Comments: _____

Total : _____

Ordering Information – Billing Address of Card

Name _____
Organization _____
Address 1 _____
Address 2 _____
City _____
State/Prov. _____ Country _____ Postal Code _____
Phone _____ Fax _____
Email _____

Payment

Credit Card Type: MasterCard Visa American Express Bill Me/PO
Name on Card _____
Card Number _____
Exp. Date _____ (mm/yy) Security Code _____

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