

Advisory and Research:

Price List

IHL Retail Executive Advisory Program (REAP) and Syndicated Research Price List



Updated 06/07/2023



HARD DATA, SMART DECISIONS

Phone +1 615-591-2955 • www.ihlservices.com

About IHL Group

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 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 arm's 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.

IHL Research at a Glance

Artificial Intelligence

Retail's AI Revolution Forecast Model	5
---------------------------------------	---

Executive Advisory Programs

Retail Executive Advisory Program (REAP)	6-7
Strategic Operations Exchange	8

Retail Executive Advisory Programs

Building an Insurmountable Lead-How Technology is Separating Retailers from Competitors	9-10
Over & Out-Retail's Inventory Distortion Matrix-2022	11
2023 Competitive Market Leaders	12
2022 Total Retail Services Market	13-15
Retail's Once-in-a Generation Tech Reset	16-17
The Order Management Software Market-2022 Version	18
B2C Ecommerce Study	19
Total Retail Software and SaaS Market	20-22
Unified Commerce	23-24

POS/Self-Service Hardware

2023 North American Retail POS Terminal Market Study	25-26
2023 Asia/Pacific Retail POS Terminal Market Study	27
2023 EMEA Retail POS Terminal Market Study	28
2023 Latin/South America Retail POS Terminal Market Study	29-30
2023 Asia/Pacific Retail Stores/POS Sizing by Retail Chain Size	31
2023 EMEA Retail Stores/POS Sizing by Retail Chain Size	32
2023 Latin/South America Retail Stores/POS Sizing by Retail Chain Size	33-34
2023 North America Retail Stores/POS Sizing by Retail Chain Size	35-36
2023 POS Terminal Hardware Vendor Market Share	37
2023 North American Retail POS Terminal Market Study	38
2023 EMEA Retail Store Printer Study	39

POS Software

2023 Asia/Pacific Merchant POS/mPOS Software ISV list with Marketshare	40
2023 EMEA Merchant POS/mPOS Software ISV List with Marketshare	41
2023 North America Merchant/mPOS Software ISV List with Marketshare	42
Mid-Market Retail POS Software Market	43-44

Mobile and Cloud Research

2023 mPOS Hardware Market Share	45-46
mPOS 3.0 (2022 Mobile POS Study)	47-48

BI, Marketing, eCommerce & Operations

Over & Out-Retail's Inventory Distortion Matrix-2022	11
The Order Management Software Market-2022 Version	18
2021 Store Openings/Closings Detailed List	49-50
Unified Commerce	23-24

Sophia Lead-Generation/Customer Intelligence

Sophia - Wisdom for IT	51-52
Key Retail Decision Makers	53
Sophia Knows Your Trade Show	54-55

IT Forecasts

WorldView – IT Sizing Worldwide	56-57
Insight IT Spend – Powered by Sophia	58

RAPID RFP Toolkits

RAPID POS	59
-----------	----

Custom Research 60

Speaker's Bureau 61

The Fine Print 62



Retail's AI Revolution Forecast Model

\$4,995.00

1

ADD TO CART

** For all license choices and descriptions, please see pricing tab below*

Product Overview

IHL's Retail AI Forecast Model is a forecast model for the impact of Traditional AI/ML, Generative AI, and Artificial General Intelligence for the Retail and Hospitality markets from 2022 – 2029. We forecast the economic impact in great detail, including the following breakouts:

DATE OF PUBLICATION
May 23, 2023

Model for Pivot Tables

AI Type by Segment – looks at the forecast by segment by region for Traditional AI/ML, Generative AI, and Artificial General Intelligence from 2022-2029 via the Income Statement Categories of Sales Impact, Gross Margin Impact, and Sales & General Administrative Impact.

- **Tiers** – Forecast by region by segment by level of annual retail sales from 2022-2029 (Includes Tier 1 (over \$1b in sales), Tier 2 (\$250m-\$1b), and Tier 3 (under \$250m))
- **Line of Business Categories** – Forecast impact by region, by line of business category (ecommerce, stores, distribution and supply chain, marketing, BI, etc.) from 2022-2029
- **By Technology Type** – Forecast impact by over 120 technology types, showing the projected improvement by each area from 2022-2029 for each region.

For access to the complete AI Forecast Model, [click here](#)



Retail Executive Advisory Program

IHL was developed originally with the product manager in mind. The rigor, the detail solutions, the forecasts in WorldView and installs in our Sophia product provide the backbone of our research and market sizing. But those product managers and marketing managers we began working with are now the leaders with much broader views and needs.

The [IHL Retail Executive Advisory Program \(REAP\)](#) provides that broad market view that execs need, but with the detail underneath that the managers need to execute strategies. **And it's an Enterprise license rather than individual seats so there are no seat games to play.** The right data, at the right level, at the right time.

IHL's [Retail Executive Advisory Program \(REAP\)](#) is a combination of executive level research studies, advisory inquiries, briefings, webinars, IT forecasts and Onsite days packaged so that senior executives from retailers and vendors can have access to and receive the latest data from IHL's stable of analysts. It's an ongoing dialogue that benefits your company.

At the heart of the REAP Program is a series of research studies that include market size, key components, key players, trends, market drivers, barriers and forecast for market growth.

RELATIONSHIP
Advisory

GEOGRAPHY
WorldWide

LICENSE
Enterprise License - No Seat Limitations

AUTHOR(S)
Greg Buzek
Jerry Sheldon
Lee Holman

Current Studies

- Building an Insurmountable Lead – How Technology is Separating Leading Retailers from Competitors*
- Retail's Once-in-a-Generation Tech Reset*
- Future of Grocery*
- Retail's Shakeout and Growth Story*
- The Consumer's Voice – Updated Worldwide Consumer Study*
- Over and Out – Retailer's Inventory Distortion Matrix*
- 2023 Competitive Market Leaders – Who are Retailers Buying?*
- Total Retail Services*
- Retail's Frictionless Future*
- The Order Management Software Market*
- Mid-market POS Software*
- Unified Commerce*
- Total Retail Software and SaaS Market*
- North American ISV Market Share and Gross Payment Volume*
- Europe POS ISV Market Share and Gross Payment Volume*
- Retail eCommerce Study*
- Retail on the Edge*
- The Retail Analytics Advantage*
- Insights to Actions – Addressing Total Retail Loss*
- Can Retailers Handle the Truth – The True Cost of Out-of-Stocks and Overstocks*
- How Retailers Win Customer Loyalty in an Omnichannel World*
- Unified Commerce Study*
- Location, Location, Location – How Location Technologies are Transforming Retail*
- Returns Epidemic – How Retail Returns Are Out of Control*
- The Retail Tech Tsunami – Why Your IT Business Isn't Ready*

*Studies can be replaced with other IHL research studies.

Retail Executive Advisory Program

Below is a chart of the Advisory Levels and

	Entry \$25,000	Bronze \$40,000	Silver \$55,000	Gold \$80,000	Platinum \$130,000
License Type	Enterprise (unlimited seats)	Enterprise (unlimited seats)	Enterprise (unlimited seats)	Enterprise (unlimited seats)	Enterprise (unlimited seats)
Analyst Advisory Inquiries	10	12	15	25	Unlimited
# Research Studies	5 <i>(pages 2 and 10 for list of studies)</i>	7 <i>(pages 2 and 10 for list of studies)</i>	10 <i>(pages 2 and 10 for list of studies)</i>	16 <i>(pages 2 and 10 for list of studies)</i>	All Current and Any New
Analyst Briefings	2	3	4	4	6
OnSite Days/Customer Presentation		1	2	3	4
IHL State of Industry Briefings		1	2	2	4
Webinars				1	2
Sophia Lead Generation*				1 Region	All Sophia
WorldView Retail IT Forecast Model*					WorldView, 4 yr Forecast

- *Sophia Lead Generation and WorldView can be added to any level as additional cost or substituted for research studies*
- *Options are for examples. This can be customized for your needs at \$25,000 or higher by substituting components*

what is included.

Key Advantages Over Other Advisory Relationships

- **Enterprise level subscription to all research. No seat games, one price gets access to everyone in your firm.**
- **Each of the Advisory Research Studies is backed by the IHL Sophia Data Service that tracks individual installs for over 3,500 retailers and the IHL WorldView IT Forecasting Model that tracks and forecasts over 300 different technologies.**
- **Advisory Inquiries can be made from anyone on your staff (according to your subscription level)**
- **Platinum Subscription includes unlimited advisory inquiries for a year.**
- **Analyst Briefings and IHL State of the Industry Briefings can include your entire team, not limited to select individual**

For complete details, [see our website](#) or contact us at reap@ihlservices.com.



Strategic Operations Exchange

See pricing on our [website](#)

This is a program developed and offered only to those working for retailers, consumer package goods companies, restaurants, and other hospitality establishments.

The **IHL Strategic Operations Exchange (SOE)** is an initial briefing for the purposes of helping companies answer short questions that plague CIOs and IT personnel at the time of making a key buying decision. Particularly with the move to Unified Commerce and the cost of false starts so great, this confidential review with IHL and C-CORE analysts/consultants is time meant to be a frank and open exchange to help you make better informed decisions.

For more information and to download a complete outline, [see the product on our website](#).

DATE OF PUBLICATION

February 1, 2023

RELATIONSHIP

Advisory

GEOGRAPHY

WorldWide

LICENSE

**Enterprise License - No
Seat Limitations**

AUTHOR(S)

Greg Buzek

Jerry Sheldon

Lee Holman



Building an Insurmountable Lead – How Technology is Separating Leading Retailers from Competitors

\$4,995.00

Licenses Available: **Enterprise** \$4,995USD

Since the start of the pandemic, Retail is experienced a once-in-a-generation increase in IT spend due the change in shopping journeys for consumers. This has only continued in growth as we look at 2023. Although consumers have come back to stores, the digital increase is here to stay. Retailers must get these transactions profitable. Add to this the ongoing labor challenges and retail is automating everything that they can automate. And there are clear differences in the technology stack of those retailers that are winning in sales growth by making things easier for consumers to buy. As well, there are clear differences among profit leaders on the technologies behind the scenes that are continuing to improve their margins and offset the impacts of inflation.

In this collaborative study with RIS News you will gain insight into what some of the more successful retailers have been doing to pivot their businesses during trying times. Which technologies lead to profitability for new digital journeys? What technologies are Leaders looking to adopt? What types of retails struggled to survive, never mind thrive? How is BOPIS driving store investment? How many are not only growing stores but growing the sales in those stores vs those who are simply accepting a lower sales per store? What about ecommerce growth, how much of this is expected to be desktop vs mobile? What percentage of budget is available for innovation vs just keeping the lights on? And finally, which new initiatives such as Edge Computing, SD-WAN, Microservices Architecture, IoT, Store-level 5G, and Dark Stores / Dark Kitchens are seeing growth in investment vs. declines?

DATE OF PUBLICATION
December 5, 2022

FORMAT
Electronic PDF

GEOGRAPHY
North America

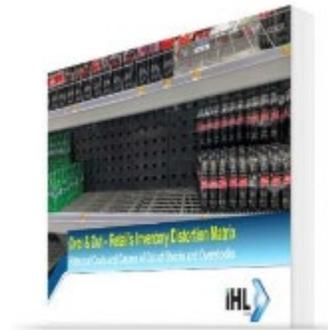
AUTHOR(S)
Greg Buzek
Lee Holman

With responses from over 269 top retail brands we have produced the results in a detailed, but very easy to read study. You also get the raw data to do your own analysis by segment

The report is designed for use by Retailers, Hardware Providers, Software Providers, Service Providers, Investors, Property Managers and others who might have a vested interest in the North American retail market. The complete outline with chart titles is below.

The raw data is also available for this study when purchased.

For more information and to download a complete outline, [see the product on our website](#).



Over & Out – Retail’s Inventory Distortion Matrix – 2022

\$8,000.00

Licenses Available: \$8,000 USD for full model; \$2,000 USD for each region USD

This product can be purchased in total or as a subset. The price above reflects total model cost. [Contact us for options for purchasing a subset or see demo](#)

IHL has been tracking the cost of overstocks and out-of-stocks for over 15 years down to the segment and region level. Instead of relying just on what retailers tell us their systems say, IHL interviews consumers to see what is really happening. How often are they leaving the stores without purchasing something they intended to buy? Depending on the segment, this can be as high as 1 in 4 items. This model breaks down those reasons and assigns a loss figure to those individual retailers involved.

While the industry has made significant progress in some areas, the problem continues to grow as retail has grown around the world. While in North America and Western Europe, major strides have been made in performance, worldwide the problem of inventory distortion has only grown to a \$1.9Trillion issue around the world.

DATE OF PUBLICATION
August 23, 2022

FORMAT
Microsoft Excel

GEOGRAPHY
Worldwide or by Region

IHL’s Over & Out – Retail’s Inventory Distortion Matrix tracks these costs by segment around world showing historical changes and where improvements have been made and where challenges still exist. This is designed for retailers to see where the big problems are to benchmark themselves against their competition as well as for vendors that are looking that offer solutions to attack these issues. Because of the granularity of the data, vendors can target the true costs by segment and reasons.

Data can be purchased by region and segment. [Contact us](#) to schedule a quick webinar to review. See below for more details.



2023 Competitive Market Leaders

\$3,995.00 – \$16,000.00

Licenses Available: **Enterprise** \$3,995USD; **Posting** \$5,995; **Distribution** \$16,000 USD

Who is really winning among IT Vendors? Are retailers really shunning Amazon Web Services (AWS). Who are customers increasing business with in 2023? Does that differ by segment? How are solution provider's customers performing? Which vendors has customers best positioned for 2023? Who is getting the largest deal sizes in 2023?

This is just some of the data that is included in this research. This is what they said who is winning their business and why. This is a ranking of vendors, but it's not a popularity contest. This was one additional question in a survey of 269 major brands about who they were increasing business with, decreasing business with, don't do business with or won't do business with. The result is a series of rankings.

Rankings include the following: Amazon (AWS), Aptos, Blue Yonder, CDW, Cisco, Dell, Fujitsu, GK Software, Google, HP Inc., IBM, Infor, JDA, Manhattan Assoc., Microsoft, NCR, Oracle, Salesforce, SAP, Shopify, Toshiba GCS, Sensormatic Retail and Zebra.

The IHL Insight Market View series of research studies build upon all this knowledge and add analyst insight to graphically display vendor positioning, drive for innovation and projected growth.

The goal of this report, as well as the entire IHL Retail Executive Advisory Program (REAP), is to provide the retail community with the most detailed and complete picture imaginable of the retail technology landscape. We do this to assist retailers in vendor selection and to help the industry understand the trends, drivers and barriers that are fundamentally transforming our industry.

Retailers are encouraged to use these charts in discussions with their vendor partners. It is our intent that they provide unique insights into vendor strategy and provide thought-provoking questions as we all move though and prosper in the Era of Intentional Innovation.

NOTE: This study is available individually or at a discount as part of the IHL Retail Executive Advisory Program.

For more information and to download a complete outline, [see the product on our website](#).

DATE OF PUBLICATION
February 8, 2023

GEOGRAPHY
WorldWide



2022 Total Retail Services Market

\$4,995.00

Licenses Available: **Enterprise** \$4,995USD

The **IHL Insight MarketView** series of research studies build upon all this knowledge and add analyst insight to graphically display vendor positioning, drive for innovation and projected growth.

This particular report looks at the overall **Retail and Hospitality IT Services Market** worldwide market and includes forecasts through 2026 and vendor rankings and profiles.

In this research we look at 11 specific categories of IT Services:

- **Software Maintenance:** Activities related to bug fixes and ongoing updates of existing software systems.
- **Hardware Maintenance:** Traditional Break/Fix maintenance of hardware products throughout stores and retail enterprise but does not include the installation services.
- **Systems Integration, On-Premise:** These are services provided onsite to integrate different systems. This might include a combination of hardware and software. It is here where we include installation services.
- **Systems Integration, SaaS:** These are software integration and installation services provided in private or public cloud infrastructures primarily to integrate software systems that are exchanging data.
- **Strategic Consulting:** These are services generally provided at a higher corporate level that revolve around architecture and optimization of systems for speed, accuracy, redundancy, and security. These are then implemented as consulting projects or other categories for specific projects.

DATE OF PUBLICATION

January 3, 2022

RELATIONSHIP

Advisory

GEOGRAPHY

WorldWide

AUTHOR(S)

Jerry Sheldon

Lee Holman

- **Business Process Outsourcing (BPO):** These are the systems services and non-primary business IT activities that are contracted out to a 3rd party that allow for retailers to focus on their core competencies.
- **IT Outsourcing:** Unlike the BPO outsourcing that is designed more around non-primary business IT activities, here we are talking about the core IT functions that are related to application and infrastructure solutions.
- **Application Development:** This refers to the activities related to custom software development and includes a wide range of functionalities including solutions from scratch or customizing software to run in the way the retailer wants to operate.
- **Digital Transformation:** These are services focused around the intentional acts and acceleration of transforming business activities, processes and competencies to leverage the changes and opportunities afforded by digital technologies.
- **Cloud Services:** Once again a very broad category but includes services provided to users on demand via the internet and include SaaS services as well as Infrastructure services.
- **Other/IT:** This is a catch-all category of all the other things that the IT department has to do that are not part of the definitions outlined. Some examples include Big Data, Risk, Fraud, Security, Commerce, Payment, Emerging Technologies, Eco-sustainability, Education, Training, Portals, Content Management, Quality Assurance, Application Load Management, etc..

Who are the real leaders? What are the real Services rankings? Who is leading in retail IT Outsourcing market?? It's all here.

Companies are encouraged to use these charts in discussions with their vendor partners. It is our intent that they provide unique insights into vendor strategy and provide thought-provoking questions as we all move through and prosper in the Era of Intentional Innovation.

The goal of this report, as well as the entire **IHL Retail Executive Advisory Program (REAP)**, is to provide the retail community with the most detailed and complete picture imaginable of the retail technology landscape. We do this to assist retailers in vendor selection and to help the industry understand the trends, drivers and barriers that are fundamentally transforming our industry.

NOTE: This study is available individually or at a discount as part of the [IHL Retail Executive Advisory Program](#).

For more information and to download a complete outline, [see the product on our website](#).



Retail's Once-in-a-Generation Tech Reset

\$4,995.00

Licenses Available: [Enterprise \\$4,995USD](#)

Retail is experiencing a once-in-a-generation increase in IT spend due to the impacts of COVID and the change in shopping journeys for consumers. Although consumers have come back to stores, the digital increase is here to stay. Retailers must get these transactions profitable. Add to this the ongoing labor challenges and retail is automating everything that they can automate.

In this collaborative study with RIS News you will gain insight into what some of the more successful retailers have been doing to pivot their businesses during trying times. Which technologies lead to profitability for new digital journeys? What technologies are Leaders looking to adopt? What types of retailers struggled to survive, never mind thrive? How is BOPIS driving store investment? How many are not only growing stores but growing the sales in those stores vs those who are simply accepting a lower sales per store? What about ecommerce growth, how much of this is expected to be desktop vs mobile? What percentage of budget is available for innovation vs just keeping the lights on? And finally, which new initiatives such as Edge Computing, SD-WAN, Microservices Architecture, IoT, Store-level 5G, and Dark Stores / Dark Kitchens are seeing growth in investment vs. declines?

DATE OF PUBLICATION

January 6, 2022

FORMAT

Electronic PDF

GEOGRAPHY

North America

AUTHOR(S)

Greg Buzek

Lee Holman

With responses from over 205 top retail brands in North America, we have produced the results in a detailed, but very easy to read study. You also get the raw data to do your own analysis by segment.

The report is designed for use by Retailers, Hardware Providers, Software Providers, Service Providers, Investors, Property Managers and others who might have a vested interest in the North American retail market. The complete outline with chart titles is below.

The raw data is also available for this study when purchased.

For more information and to download a complete outline, [see the product on our website](#).



The Order Management Software Market – 2022 Version

\$4,995.00 – \$21,000.00

Licenses Available: **Enterprise** \$3,995USD, **Distribution** \$21,000USD

Retailers are racing to compete with Amazon and Walmart. And supply chain disruptions, record inflation and a looming global recession are greatly challenging retailers after multiple years of growth. Companies must get to a single version of the truth on customers so that they can be profitable in all channels. They must turn their stores into a competitive advantage and they must be able to fulfill orders from anywhere. To do so they are investing heavily into Enterprise Order Management. In fact, the Enterprise Order Management system is the core for retail going forward. Having that single order management system that allows for shipping from the warehouse, pickup at store, or simply traditional store fulfillment is key to not only surviving, but thriving in the future.

DATE OF PUBLICATION

October 19, 2022

FORMAT

Electronic PDF

GEOGRAPHY

WorldWide

This study reviews the trends and barriers around reaching this goal of a single order management system, the painful process of removing silos, and the goal of using stores and their locations as their competitive advantage. This research looks at the top vendors in this area, the size of the market and the positioning of those vendors. It is designed for retailers and vendors that are looking to move to the central order management process.

For more information and to download a complete outline, [see the product on our website](#).



B2C Ecommerce Study

\$3,995.00

Licenses Available: **Enterprise** \$3,995USD

Clearly the rise of digital orders has been a trend for two decades, but in 2020 we saw the growth go into hyperdrive. This study looks at the market and growth of business to consumer e-commerce spend, the changes in recent years, regional growth, and how the market has two distinct sectors – traditional retailers growing their e-commerce operations often with the store as the fulfilment location and then your pure-play online retailers.

Retailers can use this study to look at key vendors to consider for each of their segments. Vendors and investors can use this study for market share and to benchmark their performance against their competitors. The study includes **IHL MarketView** positioning maps show which vendors are winning in this market and those best positioned to take advantage of the growth.

The goal of this report, as well as the entire **[IHL Retail Executive Advisory Program \(REAP\)](#)**, is to provide the retail community with the most detailed and complete picture imaginable of the retail technology landscape. We do this to assist retailers in vendor selection and to help the industry understand the trends, drivers and barriers that are fundamentally transforming our industry.

NOTE: This study is available individually or at a discount as part of the [IHL Retail Executive Advisory Program](#).

For more information and to download a complete outline, **[see the product on our website](#)**.

DATE OF PUBLICATION
December 7, 2020

RELATIONSHIP
Advisory

GEOGRAPHY
WorldWide

AUTHOR(S)
Jerry Sheldon
Lee Holman



Total Retail Software and SaaS Market

\$4,995.00

Licenses Available: **Enterprise** \$4,995USD

The year 2020 has probably been one of the most bifurcated periods for retail software in recent memory. Areas such as order management, E Commerce , mobile POS, touchless payment , etc., have had a very good years as they've proven to be critical technologies in a Covid impacted economy. Those vendors in the food, drug, mass merchant space, have (by most accounts) had fantastic years. Those vendors in the general retail space, have by and large had somewhat challenging years, and vendors that primarily support the hospitality space, have had immensely challenging years. The bright spot though in hospitality has been fast food restaurants with drive thru and existing delivery infrastructure such as pizza restaurants. Those vendors heavily leveraged with SaaS based solutions have done quite well as they have been able to meet the needs Covid has exposed. Those vendors heavily leveraged in on-premise solutions have found the year much more challenging, as SaaS based solutions are, more often than not, the go-to preference.

DATE OF PUBLICATION

December 8, 2020

RELATIONSHIP

Advisory

GEOGRAPHY

WorldWide

LICENSE

**Enterprise License -
\$4,995**

AUTHOR(S)

Greg Buzek

Jerry Sheldon

Lee Holman

In spite of those challenges the Retail Software Market will reflect a slight expansion in 2020 with significant uptick and recovery expected in 2021. There are three key drivers for this expansion: retail in emerging economies is growing, enterprise retailers are re-architecting their systems to support Unified Commerce (the systems that enable the procurement, sale and delivery of merchandise independent of channel), and the rise of Cloud computing (along with its cost efficiencies). IHL projects the worldwide software market (software, cloud and on-premise maintenance) will grow 76% from \$71.0 Billion in 2019 to \$124.7 Billion in 2024. For SaaS/Cloud based solutions we project the worldwide market will grow 242% from \$19.3 Billion in 2019 to \$66.0 Billion in 2024.

IHL has been advising the retail community (vendors and retailers alike) since 1996 in retail information technology evolution and strategy.

Over the years we've amassed a tremendous amount of primary- and secondary-source data through first hand consulting experience in this pursuit. From this ever-growing knowledge base, offerings like our [Sophia Data Service](#), [The Worldview IT Sizing Forecast Model](#) as well as custom research projects have been developed and successfully launched.

The **IHL Insight Market View** series of research studies build upon all this knowledge and add analyst insight to graphically display vendor positioning, drive for innovation and projected growth.

The goal of this report, as well as the entire [IHL Retail Executive Advisory Program \(REAP\)](#), is to provide the retail community with the most detailed and complete picture imaginable of the retail technology landscape. We do this to assist retailers in vendor selection and to help the industry understand the trends, drivers and barriers that are fundamentally transforming our industry.

This particular report looks at the overall Retail Software and SaaS Market Worldwide.

Who are the real leaders? What are the real software rankings? Who is leading in the Retail software market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach? It's all here.

Retailers are encouraged to use these charts in discussions with their vendor partners. It is our intent that they provide unique insights into vendor strategy and provide thought-provoking questions as we all move through and prosper in the Era of Intentional Innovation.

Vendors covered in this research with positioning charts are the following: (alphabetically)

1010 Data, Adobe, Amadeus, Amazon, Ansira, Aptos, Ceridian, Checkpoint, Coupons.com, Dematic, Diebold Nixdorf, Dunhumby, Epicor, ESRI, First Data, Fujitsu, Gerber Technology, Global e, Google, Hot Schedules, IBM, Ibotta, iCIMS, iCrossing, Infor, Information Resources, Intershop, iTradeNetwork, JDA, Johnson Controls, Jonas Software, Kalibrate, Kronos, Lengow, Lightspeed Retail, LS Retail, Manhattan Associates, Manthan Systems, Microsoft,

Microstrategy, NCR, NEC, One Network, Oracle, PCMS Datafit, Pitney Bowes, PrestaShop, Radial, Reflexis, Relex, Revionics, RevTrax, Saba, Sage Software, Salesforce, SAP, SAS, Seeburger, Shopify, Sitecore, Snag, Square, Store Electric Systems, Symphony Gold, Tableau Software, Teradata, Toshiba Global Commerce Solutions, Turn, Ultimate Software, Witron, and WooCommerce.

*NOTE: This study is available individually or at a discount as part of the **IHL Retail Executive Advisory Program.***

For more information and to download a complete outline, [see the product on our website.](#)



Unified Commerce

\$3,995.00

Licenses Available: **Enterprise** \$3,995USD

First there was multi-channel, then cross-channel, then the dreaded omni-channel to describe the progress of integrating retail functions. The problem with each of these terms is it doesn't really describe what retailers are really trying to do. Retailers are racing to get a single version of the truth regarding the customer and the order. Information that can be utilized, tracked, and accessed regardless of the channel. COVID-19 and the rise of digital journeys with local delivery of Click and Collect only hastened the need for unified commerce. Further, retailers need insight into things coming into their supply chain and integration on the final delivery to the customer (plus order feedback) regardless of how the customer gets the product. Unified Commerce is one step beyond omni-channel and includes the technology enabled retail functions (*both inside and outside the company*) to serve the consumer where, when and how they desire.

DATE OF PUBLICATION
October 7, 2020

RELATIONSHIP
Advisory

GEOGRAPHY
WorldWide

LICENSE
**Enterprise License -
\$3,995**

Over 66% of all software spending in retail is now focused on the concept of Unified Commerce. For SaaS/Cloud this number increases to 68%. This study, part of the **IHL Insight MarketView** line of research, outlines the pillars of these buckets of spend, how big that market is and who the leaders are in North America and worldwide.

IHL has been advising the retail community (vendors and retailers alike) since 1996 in retail information technology evolution and strategy. The **IHL Insight Market View** series of research studies build upon all this knowledge and add analyst insight to graphically display vendor positioning, drive for innovation and projected growth.

Over the years we've amassed a tremendous amount of primary- and secondary-source data through first hand consulting experience in this pursuit. From this ever-growing knowledge base, offerings like our [Sophia Data Service](#), [The Worldview IT Sizing Forecast Model](#) as well as custom research projects have been developed and successfully launched.

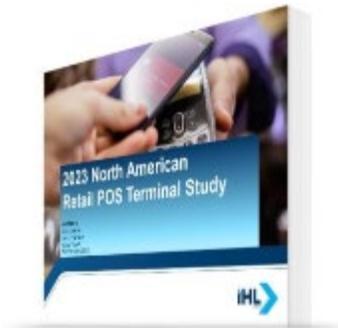
The goal of this report, as well as the entire [IHL Retail Executive Advisory Program \(REAP\)](#), is to provide the retail community with the most detailed and complete picture imaginable of the retail technology landscape. We do this to assist retailers in vendor selection and to help the industry understand the trends, drivers and barriers that are fundamentally transforming our industry.

Who are the real leaders? What are the real software rankings? Who is leading in the Retail SaaS market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach? It's all here.

Retailers are encouraged to use these charts in discussions with their vendor partners. It is our intent that they provide unique insights into vendor strategy and provide thought-provoking questions as we all move though and prosper in the Era of Intentional Innovation.

NOTE: This study is available individually or at a discount as part of the [IHL Retail Executive Advisory Program](#).

For more information and to download a complete outline, [see the product on our website](#).



2023 North American Retail POS Terminal Market Study

\$4,995.00

Licenses Available: [Enterprise](#) \$4,995USD

With the rebound in chip production and easing of supply chain issues, POS Shipments saw strong double-digit growth in 2022. The forecast for 2023 is still positive, however, higher interest rates will slow the growth we saw in 2022. This 64 page study focuses on the Retail POS market in North America for 2022-2027. It includes shipment, installed base and trends analyses of POS devices. The report is designed for use by POS Hardware and Software Providers, Maintenance Providers, Printer Manufacturers, EFT device vendors, Retailers and others who might have a vested interest in the North American Point-of-Sale Market. Additionally, the report covers emerging trends and influences that affected the market in 2021 and those that will help form market decisions in the future. It also includes estimated market value for shipments and installed base and a forecast for shipments and installed base through 2026. For an outline and sample pages, see the Preview tab. As we have for the past few years, we also include complete hospitality segments as part of the report.

DATE OF PUBLICATION

February 20, 2023

FORMAT

Electronic PDF

GEOGRAPHY

North America

AUTHOR(S)

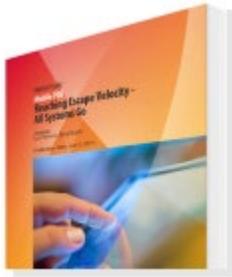
Lee Holman

We provide detailed analysis in 13 retail market segments:

- Food/Supermarkets
- Drug Stores
- Superstores/Warehouse Clubs (Costco, Sam's, etc. Includes Wal-Mart and Target Supercenters)
- Department Stores (Traditional anchor stores and discount department chains)
- Category Killers (Home Centers, Electronics, Pet Superstores, Bookstores, Sporting Goods, Furniture, etc.)
-

- Specialty Other (mall and strip-mall based Specialty Stores, predominantly apparel, shoes and gifts)
- Mass Merchandisers (includes Discount Stores)
- Convenience Stores/Gas Stations
- Table Service Restaurants (Including hotel bar/restaurant)
- Quick Service Restaurants/Fast Food Lodging
- Casino/Cruise Entertainment: Theaters, Theme Parks, Stadiums, Museums, Parks

For more information and to download a complete outline, [see the product on our website](#).



2023 Asia/Pacific Retail POS Terminal Market Study

Licenses Available: **Enterprise** \$4,995USD/\$4,294 Single User

While 2021 saw a market crash for POS shipments, 2022 rebounded and the forecast moving forward continues to show strong growth in the market. China, India, and Korea continue to expand but COVID still shadows over the region affecting growth. Our 2023 Asia/Pacific POS Market Study has 31 figures in 61 pages in which 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, India, Australia/New Zealand, South Korea, Vietnam, Taiwan, Hong Kong, 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 2022, and it includes estimates for shipments and installed base through 2027. 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.

Along with the general retail environment for each country/region, we discuss the country by country shipments, installed base, and forecasts for the following retail market segments:

- Food/Grocery
- Drug Stores/Pharmacies
- Hypermarkets
- Mass Merchants
- Department Stores
- Specialty Stores
- Hospitality

For more information and to download a complete outline, [see the product on our website](#).



2023 EMEA POS Terminal Market Study

Licenses Available: **Enterprise** \$4,995USD

Growth was back in 2021 after the COVID slowdown of shipments in 2020. This report comes out at a time of chaos with Russia's recent invasion of Ukraine.

Our 24rd annual EMEA POS report is 65 pages in length, and explores the market climate for EPOS terminals in the Europe/Middle East/Africa region.

More than just numbers without explanation, this report goes deep into discussion of retailing in the countries and segments to reveal the forces that are shaping EPOS purchase decisions. We believe it is important for our customers to not only see numbers, but understand the market behind the data so as to make more informed decisions for the future. The report includes country by country shipments, installed base, forecasts and trends for the electronic point-of-sale terminal market in EMEA.

Additionally, the report covers emerging trends and influences that affected the market in 2022 and those that will help form market decisions in the future. It also includes forecasts for shipments through 2026.

Along with the general retail environment for each country/region, we discuss the country by country shipments, installed base, and forecasts for the following retail market segments:

- Food/Grocery
- Drug Stores/Pharmacies
- Hypermarkets
- Mass Merchants
- Department Stores
- Specialty Stores
- Hospitality

.For more information and to download a complete outline, [see the product on our website](#).



2023 Latin/South America Retail POS Terminal Market Study

Licenses Available: **Enterprise** \$4,995USD

Overall, COVID really hammered the LATAM region, as lockdowns, quarantines, mask mandates and shortages ruled the day. Overall GDP in the region declined by 7% and POS shipments declined by 41.8% in 2021, the largest decline on record. For 2022, shipments rebounded 37.3%, and expectations for 2023 are expected to continue to grow. Rising fuel prices will both help and hurt the local economies. And while the region is less susceptible to increasing wheat prices, the inflation for fertilizer and other items will increase retail sales in core categories at the expense of discretionary segments.

Our Latin/South America POS terminal market study is 57 pages in length and has 22 figures. It explores the market climate for POS terminals throughout the Latin/Central and South American region. More than just numbers without explanation, this report goes deep into discussion of retailing in the countries and segments to reveal the forces that are shaping POS purchase decisions. We believe it is important for our customers to not only see numbers, but understand the market behind the data so as to make more informed decisions for the future. The report includes country-by-country shipments, installed base, forecasts and trends for the electronic point-of-sale terminal market in LATAM. Note that this is not a vendor market share report, but rather a fresh look at the state of POS technology in the world's fastest growing market.

Additionally, the report covers emerging trends and influences that affected the market in 2022 and those that will help form market decisions in the future. It also includes estimated market value for shipments and installed base and a forecast for shipments and installed base through 2027.

Along with the general retail environment for each country/region, we discuss the country by country shipments, installed base, and forecasts for the following retail market segments:

- **Food/Supermarket:** Stores that sell food and grocery items and have between 4-20 terminals per store.
- **Drug Stores/Pharmacy:** Stores that sell personal care and medicinal items and have 2-5 terminals per store.
- **Hypermarkets:** This is a broad segment that varies by country. In many, it includes a full service Food store as well as products typically included at Discounters under one roof. In other countries, stores can range anywhere from a Superstore format (think Wal-Mart Supercenter) to a full-line Department Store (with large appliances) combined with a full-line Grocery store.

- **Department Stores:** Traditionally larger format stores, upscale in products and including hard and soft goods with department style checkout.
- **Mass Merchants:** Like a Hypermarket format, only carrying non-food items or limited food items and using a front-end checkout. Also includes Discounters.
- **Specialty Stores:** Stores that focus on particular product line niches. Includes apparel, news, shoes, and DIY type stores.
- **Convenience/Gas:** Stores selling a limited variety of food and pharmaceutical items; open long hours for the convenience of customers.
- **Hospitality:** Includes Restaurants, Bars, Pubs and Hotels.

For more information and to download a complete outline, [see the product on our website](#).



2023 Asia/Pacific Retail Stores/POS Sizing by Retail Chain Size (SMB - Enterprise)

Licenses Available: **Enterprise** \$4,995USD

There is no one size fits all for retail and for solutions in Asia/Pacific. The needs differ by retailers size, by subsegment, and even by region. This 2023 research allows you to size and target the largest specific market opportunities, finding those most ripe for growth opportunities.

The information starts by looking at the entire ecosystem, the number of stores, the size of stores and then the type of store technology used. This product is ideal for vendors or private equity that are looking to understand if a market is large enough and what the indirect channel opportunities provide. This is quantitative analysis and is best used in conjunction with the regional POS Terminal Studies. And we have this information available for other regions.

Each regional SMB study breaks out the market in great detail so that you can specifically target growing niche's in the retail and hospitality market.

This data is broken down into the following segments:

- Food/Grocery
- Drug Stores/Pharmacies
- Hypermarkets/Supercenters/Warehouse Clubs
- Department Stores
- Mass Merchants and Discounters
- Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.)
- Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.)
- Hospitality

For more information and to download a complete outline, [see the product on our website.](#)



2023 EMEA Retail Stores/POS Sizing by Retail Chain Size (SMB - Enterprise)

Licenses Available: **Enterprise** \$4,995USD

There is no one size fits all for retail and for solutions in Asia/Pacific. The needs differ by retailers size, by subsegment, and even by region. This 2023 research allows you to size and target the largest specific market opportunities, finding those most ripe for growth opportunities.

The information starts by looking at the entire ecosystem, the number of stores, the size of stores and then the type of store technology used. This product is ideal for vendors or private equity that are looking to understand if a market is large enough and what the indirect channel opportunities provide. This is quantitative analysis and is best used in conjunction with the regional POS Terminal Studies. And we have this information available for other regions.

Each regional SMB study breaks out the market in great detail so that you can specifically target growing niche's in the retail and hospitality market.

This data is broken down into the following segments:

- Food/Grocery
- Drug Stores/Pharmacies
- Hypermarkets/Supercenters/Warehouse Clubs
- Department Stores
- Mass Merchants and Discounters
- Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.)
- Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.)
- Hospitality

For more information and to download a complete outline, [see the product on our website.](#)



2023 Latin/South America Retail Stores/POS Sizing by Retail Chain Size (SMB - Enterprise)

Licenses Available: Enterprise \$4,995USD

There is no one size fits all for retail and for solutions. The needs differ by retailers' size, by subsegment, and even by region. This 2022 research allows you to size and target the largest specific market opportunities, finding those most ripe for growth opportunities. There is no one size fits all for retail and for solutions in Latin/South America. The needs differ by retailers size, by subsegment, and even by region. This 2023 research allows you to size and target the largest specific market opportunities, finding those most ripe for growth opportunities.

The information starts by looking at the entire ecosystem, the number of stores, the size of stores and then the type of store technology used. This product is ideal for vendors or private equity that are looking to understand if a market is large enough and what the indirect channel opportunities provide. This is quantitative analysis and is best used in conjunction with the regional POS Terminal Studies. And we have this information available for other regions.

Each regional SMB study breaks out the market in great detail so that you can specifically target growing niche's in the retail and hospitality market.

This data is broken down into the following segments:

- Food/Grocery
- Drug Stores/Pharmacies
- Hypermarkets/Supercenters/Warehouse Clubs
- Department Stores
- Mass Merchants and Discounters
- Specialty Hard Goods (DIY, Electronics, Books, Furniture, Sporting Goods, etc.)

- Specialty Soft Goods (Apparel, Shoes, Leather Goods, etc.)
- Hospitality

For more information and to download a complete outline, [see the product on our website.](#)



2023 North America Retail Stores/POS/mPOS Sizing by Retail Chain Size (SMB - Enterprise)

Licenses Available: **Enterprise** \$4,995USD

There is no one size fits all for retail and for solutions. The needs differ by retailers size, by subsegment, and even by region. This research for 2023 allows you to size and target the largest specific market opportunities, finding those most ripe for growth opportunities. The information starts by looking at the entire ecosystem, the number of stores, the size of stores and then the type of store technology used. This product is ideal for vendors or private equity that are looking to understand if a market is large enough and what the indirect channel opportunities provide. This is quantitative analysis and is best used in conjunction with the regional POS Terminal Studies. And we have this information available for other regions.

Each regional SMB study breaks out the market in great detail so that you can specifically target growing niche's in the retail and hospitality market. It provides POS and POS Software sizing along with optional EFT/POS sizing options (how many use signature capture versus PIN/Debit versus embedded payment software). The data is broken down into the following segments:

- Food/Grocery
- Drug Stores/Pharmacies
- Hypermarkets/Supercenters/Warehouse Clubs
- Department Stores
- Mass Merchants and Discounters
- 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 – Stadiums, Museums, Theme Parks

In addition, the data is broken out by the following size of retailers:

- 1 Store Companies
- 2-9 Store Chains
- 10-49 Store Chains
- 50-100 Store Chains
- 101-300 Store Chains
- 301-500 Store Chains
- 501-1,000 Store Chains
- Over 1,000 Store Chains

For each of the segments and sizes we have the following information:

- # stores
- # of Companies that make up those stores
- Average # of Cash Points (where tender is taken) Average software license paid
- Total number of Cash Points in that segment/size
- How many of those cash points are nothing but a wallet verses ECR, Traditional POS or PC on a Cash Drawer.

The information includes the installed base as well as the shipments for the last two years and a forecast for the year forward.

For more information and to download a complete outline, [see the product on our website](#).



2023 POS Terminal Hardware Vendor Market Share

Licenses Available: **Annually** \$29,000USD

Includes full year for 2023 actual data

This research provides shipments and installed base on a quarterly and annual basis for vendors such as Toshiba Global Commerce (IBM), NCR, HP, Diebold-Nixdorf, Fujitsu, Dell, MICROS, Radiant, Digipos, and many others. It includes data on processors and operating systems historically and provides a forecast going forward. It is the only review of the POS market that includes the PC on Cash Drawer (PCOCD) market. Below in the Product Highlights section we get into the details of the data available. The Preview tab gives you some pictorial examples of the types of data available. This is very data intensive research and can go as deep as shipments by segment by region by operating system or processor-type. The data can also be purchased simply in aggregate by vendor worldwide or by individual region. Included are historical data back 2 years and projections forward for the next 6 quarters by vendor. These data are meant to be used in conjunction with the POS Terminal Studies by region. It is in these studies where we discuss trends, barriers to entry, and growth assumptions. The data here are purely quantitative in nature. We are thankful to the vendors who participate in sharing data points to make this as accurate as possible.

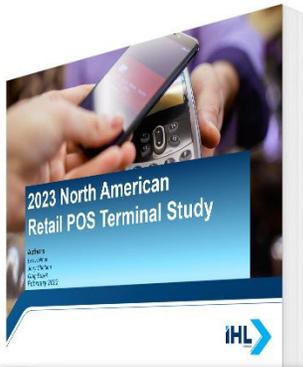
Data is available for 4 regions:

- North America (US and Canada)
- LATAM (Mexico, Brazil, Latin/South America and Caribbean)
- Europe/Middle East/Africa (includes Eastern Europe and Russia)
- Asia/Pacific (includes China and India)

For each segment we provide data for the top 5-7 vendors per the following retail segments:

- Food/Supermarkets
- Drug Stores
- Hypermarkets/Superstores/Warehouse Clubs
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Hospitality (Pubs, Table Service/Family Restaurants, Fast Food)

For more information and to download a complete outline, [see the product on our website](#).



2023 North American Retail POS Terminal Market Study

\$4,995.00

Product Overview

With the rebound in chip production and easing of supply chain issues, POS Shipments saw strong double-digit growth in 2022. The forecast for 2023 is still positive, however, higher interest rates will slow the growth we saw in 2022. This 64 page study focuses on the Retail POS market in North America for 2022-2027. It includes shipment, installed base and trends analyses of POS devices. The report is designed for use by POS Hardware and Software Providers, Maintenance Providers, Printer Manufacturers, EFT device vendors, Retailers and others who might have a vested interest in the North American Point-of-Sale Market. Additionally, the report covers emerging trends and influences that affected the market in 2022 and those that will help form market decisions in the future. It also includes estimated market value for shipments and installed base and a forecast for shipments and installed base through 2027. For an outline and sample pages, see the Preview tab. As we have for the past few years, we also include complete hospitality segments as part of the report.

DATE OF PUBLICATION
February 20, 2023

FORMAT
Electronic PDF

GEOGRAPHY
North America

We provide detailed analysis in 13 retail market segments:

- Food/Supermarkets
- Drug Stores
- Superstores/Warehouse Clubs (Costco, Sam's, etc. Includes Wal-Mart and Target Supercenters)
- Department Stores (Traditional anchor stores and discount department chains)
- Category Killers (Home Centers, Electronics, Pet Superstores, Bookstores, Sporting Goods, Furniture, etc.)
- Specialty Other (mall and strip-mall based Specialty Stores, predominantly apparel, shoes and gifts)
- Mass Merchandisers (includes Discount Stores)
- Convenience Stores/Gas Stations
- Table Service Restaurants (Including hotel bar/restaurant)
- Quick Service Restaurants/Fast Food Lodging
- Casino/Cruise Entertainment: Theaters, Theme Parks, Stadiums, Museums, Parks



2023 EMEA Retail Store Printer Study

\$4,995.00

Product Overview

This report provides an overview of the printer market share in EMEA retail and hospitality.

We look at five categories of printers relative to those utilized in the retail and hospitality store environment:

DATE OF PUBLICATION	May 24, 2023
FORMAT	PDF
GEOGRAPHY	Europe/Middle East/Africa
LICENSE	Enterprise
AUTHOR(S)	Jerry Sheldon

- **POS Register Receipts** – this is inclusive of many different types including thermal, impact, slip-only, dual station, multi-station and inkjet, though the vast majority in use in this application are thermal.
- **Mobile/Tablet POS Receipt** – These would be printers that work in conjunction with mobile POS either in the form of a handheld or tablet, but not directly integrated into the device like you can see in some handheld payment devices.
- **SCO/Kiosk Receipts** – These are typically thermal receipts used either in self-checkout systems or kiosks, but not mechanisms, but complete units.
- **In-House Food Preparation** – An in-house food preparation printer is a printer that prints labels for food items that are prepared in-house. These labels can include information such as the name of the dish, the date it was prepared, and any other relevant information. They are used to help keep track of inventory and ensure that food is being prepared safely and efficiently. Some printers can also print custom labels with logos or other branding information.
- **Label Receipts** – This would be a device that prints labels to facilitate different processes in the food industry, retail stores, and other businesses. It generates adhesive labels with specific information, which can be attached to bags, cups, or other items for identification, tracking, or organization purposes.



2023 Asia/Pacific Merchant POS/mPOS Software ISV List with Marketshare

Licenses Available: **Enterprise** \$6,995USD

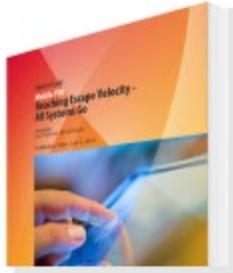
This product is a list of over 180 top POS ISVs (independent software vendors) in the Asia/Pacific POS and mPOS markets for merchants and retailers. It is inclusive of those that make their own POS equipment like NCR, Oracle, Oracle/MICROS, Fujitsu and others, as well as pure software players like Aptos, OneView Commerce, and others. This list also includes the mPOS players such as Square, Toast, Clover, etc.

For each company, we look at their overall business, Total revenue, maintenance revenues, licenses outstanding, and Gross Payment Volume through their systems installed. We look at the data for Enterprise-level retailers by segment (retailers with 50 or more stores) and then SMB (below 50 stores) and this data is broken down by 13 different segments.

This product is ideal for payment providers, POS companies, private equity companies looking for acquisition candidates. It provides market share by more than 30 different metrics.

The format is in Excel and provides custom graphing opportunities.

For more information and to download a complete outline, [see the product on our website](#).



2023 EMEA Merchant POS/mPOS Software ISV List With Marketshare

Licenses Available: Enterprise \$4,995USD

This product is a list of over 185 top POS ISVs (independent software vendors) in the Europe/Middle East Africa POS and mPOS markets for merchants and retailers. It is inclusive of those that make their own POS equipment like NCR, Oracle, Oracle/MICROS, Fujitsu, and others, as well as pure software players like Aptos, OneView Commerce, and others. This list also includes the mPOS players.

For each company, we look at their overall business, Total revenue, maintenance revenues, licenses outstanding, and Gross Payment Volume through their systems installed. We look at the data for Enterprise-level retailers by segment (retailers with 50 or more stores) and then SMB (below 50 stores) and this data is broken down by 13 different segments.

This product is ideal for payment providers, POS companies, private equity companies looking for acquisition candidates. It provides market share by more than 30 different metrics.

The format is in Excel and provides custom graphing opportunities.

For more information and to download a complete outline, [see the product on our website](#).



2023 North America Merchant POS/mPOS Software ISV List with Marketshare

Licenses Available: **Enterprise** \$4,995USD

This product is a list of over 179 top POS ISVs (independent software vendors) in the North American POS and mPOS markets for merchants and retailers. It is inclusive of those that make their own POS equipment like NCR, Oracle, Oracle/MICROS, Fujitsu, and others, as well as pure software players like Aptos, OneView Commerce, and others. This list also includes the mPOS players such as Square, Toast, Clover, etc.

For each company, we look at their overall business, Total revenue, maintenance revenues, licenses outstanding, and Gross Payment Volume through their systems installed. We look at the data for Enterprise-level retailers by segment (retailers with 50 or more stores) and then SMB (below 50 stores) and this data is broken down by 13 different segments.

This product is ideal for payment providers, POS companies, private equity companies looking for acquisition candidates. It provides market share by more than 30 different metrics.

The format is in Excel and provides custom graphing opportunities.

For more information and to download a complete outline, [see the product on our website](#).



Mid-Market Retail POS Software Market

\$3,295.00 – \$3,995.00

Licenses Available: **Single** \$3,295USD, **Enterprise** \$3,995USD

The POS Market is exploding worldwide for three main reasons: the sunset of Windows 7 support, the expansion of retail in emerging economies, and retailers are re-architecting their systems for Unified Commerce (the systems that enable the procurement, sale and delivery of merchandise independent of channel) and Cloud computing (along with its cost efficiencies).

While most views of the of the market tends to focus on those largest accounts or the smallest accounts, the mid-market currently comprises a significant population of the installed units on a worldwide basis. Combine this with the fact that emerging retailers are both the greatest area of growth and also represents the largest population of retailers that are not using any technology, it is easy to understand the importance of this underserved area of research. *This research specifically addresses this area – fast growing retailers that are between the startups and the giants.*

IHL has been advising the retail community (vendors and retailers alike) since 1996 in retail information technology evolution and strategy.

Over the years we've amassed a tremendous amount of primary- and secondary-source data through first hand consulting experience in this pursuit. From this ever-growing knowledge base, offerings like our [Sophia Data Service](#), [The Worldview IT Sizing Forecast Model](#) as well as custom research projects have been developed and successfully launched.

DATE OF PUBLICATION

September 23, 2019

FORMAT

Electronic PDF

GEOGRAPHY

WorldWide

LICENSE

**Single User License -
\$3,295 | Enterprise
License - \$3,995**

AUTHOR(S)

**Jerry Sheldon
Lee Holman**

The **IHL Insight Market View** series of research studies build upon all this knowledge and add analyst insight to graphically display vendor positioning, drive for innovation and projected growth.

The goal of this report, as well as the entire **[IHL Retail Executive Advisory Program \(REAP\)](#)**, is to provide the retail community with the most detailed and complete picture imaginable of the retail technology landscape. We do this to assist retailers in vendor selection and to help the industry understand the trends, drivers and barriers that are fundamentally transforming our industry.

This particular report looks at the overall Retail Software and SaaS Market Worldwide.

Who are the real leaders? What are the real software rankings? Who is leading in the Retail software market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach? It's all here.

Retailers are encouraged to use these charts in discussions with their vendor partners. It is our intent that they provide unique insights into vendor strategy and provide thought-provoking questions as we all move through and prosper in the Era of Intentional Innovation.

Vendors covered in this research with positioning charts are the following: (alphabetically)

Auto-Star, Cegid Group, CitiXsys, Diebold Nixdorf, ECR Software, Epicor, Epos Now, Fujitsu, Gilbarco, Global Payments, Granbury Solutions, Infor, iQmetrix, Jonas SW, KWI, LivePOS, LS Retail, McKesson RX, Mi9, Microsoft, NCR, NEC, Oracle, Panasonic, ParTech, PDX, Inc., Petrosoft, Posera, Retail Pro, Revention, SIR Solutions, Squirrel Systems, Toast, Tokheim, Toshiba GCS, Verifone, Vista Entertainment, Windward Software and Zonal.

NOTE: This study is available individually or at a discount as part of the [IHL Retail Executive Advisory Program](#).

For more information and to download a complete outline, [see the product on our website](#).



2023 mPOS Hardware Market Share

Licenses Available: **Annually** \$29,000 USD

This product can be purchased in total or as a subset. The price above reflects total model cost.

Through Q2 2023

The move to mobile for associates is the single fastest adopting trend we have seen since the rush to get stores Internet-enabled. This research looks specifically at those mobile devices being used for POS functions. How big is this market? How fast is it growing? Which vendors are winning? What screen format should you write the software for? This research will tell you. This product provides shipments and installed base on a quarterly and annual basis for vendors such as Apple, Zebra, Samsung, HP, Lenovo, Dell, HTC, Motion Computing, NEC, and many others for use of mobile devices for POS, an area that is exploding in retail. It includes data on screen size formats and operating platforms. We distinguish between retail hardened devices and consumer grade devices. This is a very data intensive product and can go as deep as shipments by segment by region by operating system or screen size. Or the data can be purchased simply in aggregate by vendor worldwide/region. It includes historical data and projections forward for the next 6 quarters by vendor.

Below in the Product Highlights section we get into the details of the data available. The Preview tab gives you some pictorial examples of the types of data available.

This is very data intensive research and can go as deep as shipments by segment by region by operating system or processor-type. The data can also be purchased simply in aggregate by vendor worldwide or by individual region. Included are historical data back 2 years and projections forward for the next 6 quarters by vendor.

These data are meant to be used in conjunction with the Mobile POS Study which provides the qualitative background of the trends. It is in this study where we discuss trends, barriers to entry, and growth assumptions. The data here is purely quantitative in nature. We are thankful to the vendors who participate in sharing data points to make this as accurate as possible.

For more information and to download a complete outline, [see the product on our website.](#)



CHECK PRICING?

mPOS 3.0 (2022 Mobile POS Study)

\$3,995.00

Licenses Available: [Enterprise](#) \$4,995USD

Historically, smaller retailers (Tier III) have been the most aggressive adopters of Mobile POS, mainly due to costs, user friendliness, flexibility, and the fact that they are seriously under-served by the leading POS vendors. As a result, in 2021 retailers with less than 10 locations were responsible for 64.2% of the installed base.

Going forward, we expect the story to change a bit, as Tier I retailers have begun to embrace mPOS in a much bigger way with new customer journeys. This started before COVID-related shutdowns had a disastrous impact upon retail and hospitality in general, and small mom & pop merchants in particular. IHL estimates that approximately 338,000 small retail and restaurant locations closed as a result of these shutdowns. These closures resulted in a sharp decline in the mobile POS installed base for small merchants.

DATE OF PUBLICATION
May 23, 2022

FORMAT
Electronic PDF

GEOGRAPHY
North America

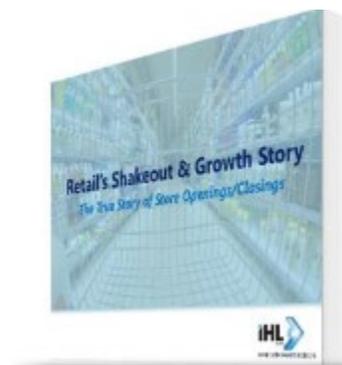
We named this mPOS 3.0 as there is a new level of maturity in systems and decisions for enterprise retailers. While consumer devices might look cooler, the need for enterprise class wi-fi and security with the explosion of IoT devices deployed has forced retailers to grow up. Also, that premium between enterprise class and consumer class is shrinking bringing many of these decisions to the forefront of CIO offices going forward. The customer of today and tomorrow are mobile and multi-channel causing retailers to adjust accordingly.

This research looks at the current state of Mobile POS in North America, the adoption rates of the various retail verticals, and the shipment and installed base details by type of device (Rugged Handheld, Non-Rugged Handheld, and Tablets). It includes market sizing, trends, and forecasts through 2026.

This study is designed for use by Private Equity Investors, Mobile POS Hardware and Software Providers, Service Providers, Maintenance Providers, Retailers and others who might have a vested interest in the North American Mobile Point-of-Sale Market.

Note, this study does not include share by vendor although it does discuss future retailer preferences. For detailed vendor share and forecasts we recommend our [Mobile POS by Vendor](#) research where we track the number of devices shipped by Apple, HP, Toshiba, Motorola, and others and our [POS/mPOS ISV List](#)

For more information and to download a complete outline, [see the product on our website.](#)



2021 Store Openings/Closings Detailed List

\$995.00

Licenses Available: **Enterprise** \$995USD

This is a detailed list of 945 retailers with 50 or more stores and their store counts, net openings and closings in the retail and restaurant industries.

This product is ideal for retailers, property owners, REITs, IT companies and others that are looking to identify which retailers are healthy and growing and those that might be struggling or shrinking their footprint and historical data that matches those statements.

Data is provided for 2017, 2018, 2019, 2020, and 2021 based on current company statements and is put together from 10ks, company releases and announcements based on thousands of hours of research.

If you are looking for the summary top level webinar data, [you can get that here for free.](#)

DATE OF PUBLICATION

August 9, 2021

FORMAT

Excel

LICENSE

**Enterprise-Wide Internal
- Subject to End User
License**

GEOGRAPHY

North America

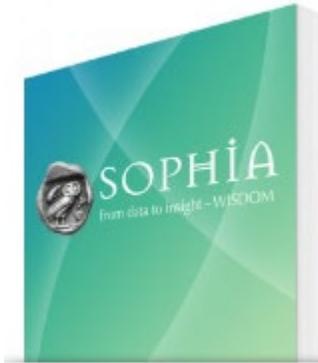
The information is provided as the net change in store counts. For instance, if a company opens 30 stores and closes 5, the figure for that retailer is a +25. For an example, see the PREVIEW tab below.

After reviewing this list, should you wish to know “who you should contact” at each of the companies, we would refer to you to our [Sophia system](#).

Should you have any questions, feel free to [contact us](#).

Note: In a limited number of cases, the parent does not reveal the number of openings and closings by their subsidiaries but only at the parent level. In this case, we list the changes in the parent level but not at the subsidiary level, but we list the subsidiaries for reference purposes. This affects less than 10% of the total number.

For more information and to download a complete outline, [see the product on our website](#).



Sophia – Wisdom for IT

See pricing on our [website](#)

Now with Pure Play Ecommerce Companies

Sophia is by far the most comprehensive source of not just validated leads, but key wisdom for smart decisions in the retail industry. It is the only lead generation system that links IT spend, to specific technology, to specific personnel, to specific financial results, tied together and backed by our advisory staff. **Sophia** provides insight into nearly 300 types of hardware/software/services and key personnel for over 7,000 retailers and restaurants in North America and Europe/Middle East/Africa.

Now with Predictive Analytics, the system allows for benchmarking against competitors, identifying which retailers are leaders in specific technologies, their projected IT spending plans in key categories (like Business Intelligence/Analytics, Merchandising/Supply Chain, ERP, and Store Systems), and **which technologies they are likely to purchase in the next 24 months.**

Your enterprise relationship 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

DATE OF PUBLICATION

February 10, 2023

GEOGRAPHY

North America/EMEA

LICENSE

**Enterprise/Electronic -
See Pricing Tab for Fair
Use**

FORMAT

Online - Web Access

AUTHOR(S)

Greg Buzek

Jerry Sheldon

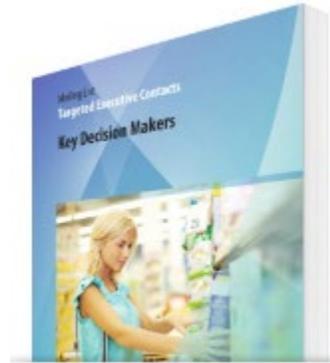
Lee Holman

Sophia is the only data research that takes an enterprise view of the technology that retailers are deploying AND the performance that they are achieving with the use of these technologies. All wrapped up as an industry best lead generation system. It allows you to let your sales team focus on specific opportunities instead of wasting jet fuel and money going from prospect to prospect with no insight.

Sophia Core Benefits

- **Company Profiles** – Complete profiles of companies on 300 different technologies they have deployed.
- **Lead Generation** – Nearly 100,000 validated contacts with emails based on technology installed and likely replacement dates.
- **Graphical Financial Benchmarks** – Compare key financial metrics of retailers by segment and subsegment. Zoom in to review the financial metrics for the entire retail segment.
- **IT Spending Breakouts** – Each profile includes projected IT budget information for hardware, software, services in the following categories (Infrastructure, Store Systems, Core ERP, Application Development, Collaboration, Merchandising/Supply Chain, Commerce, BI/Analytics, Sales & Mktg, Legal/Real Estate).
- **Key Technology Leadership** – Is the retailer a leader in particular technologies? We look at key financial metrics and the strength of the retailer and leadership in key technologies in each company SPA profile.
- **What's in Play** – One of the key benefits of **Sophia** is the ability to see into the future for each retailer and see which systems are due for replacement and which game changing technologies they are likely to invest in within the next 24 months.
- **Key Vendor Influence** – Every account has key vendors that have significant influence to enhance your opportunity or block your opportunity. The SPA profiles show you which vendors in the account are your friend or foe.

For more information and to download a complete outline, [see the product on our website](#).



Key Retail Decision Makers

See pricing on our [website](#)

Need a Mailing List of Key Retail Technology Decision Makers? People like CIOs, VPs of MIS, Store Operations, CEOs, etc. We can provide targeted lists using a variety of criteria such as:

- **Specific Titles** – *CIO, Merchandising, Store Operations, etc.*
- **Specific Technologies** – *POS, Inventory Control, Supply Chain, etc.*
- **Specific Vendors Installed** – *IBM, NCR, Oracle, JDA, etc.*
- **Within a Sales Range** – *from \$0 – \$1 Trillion*
- **Any Combination of the Above**

DATE OF PUBLICATION
February 10, 2023

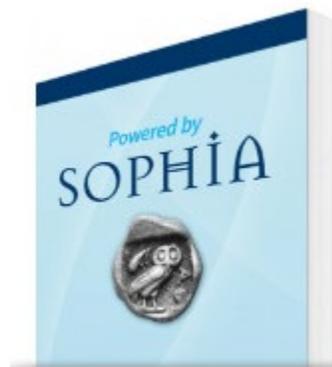
GEOGRAPHY
North America

LICENSE
**Electronic - See Pricing
Tab for Fair Use
Agreement**

FORMAT
Microsoft Excel

AUTHOR(S)
Greg Buzek
Jerry Sheldon
Lee Holman

For more information and to download a complete outline, [see the product on our website.](#)



Sophia Knows Your Trade Show

\$1,495.00

Licenses Available: **Enterprise** \$1,495USD

You've spent the money on the booth at the Retail Trade Show in NYC, now **drive the traffic to make it a GREAT show for your company!**

Every year it is so hard to figure out which customers are coming to NYC Retail Trade Show to get those meetings set up. The difference of having a decent show and having a GREAT show is having your meetings planned and setup before you get there. We have these contacts.

With a little reverse engineering, we have put together a highly targeted list of retail executives likely to be attending based on the companies that are listed as attendees. We have packaged them into a product called **Sophia Knows Your Trade Show**.

Included in this information are name, company, title, email address, website, address, phone numbers, revenues, segment, # stores, number of POS Terminals, and many other key company facts to help you sort.

We provide a customized list of approximately 4,650+ likely attendees (verified in the last month). All information can be sent electronically and used multiple times.

DATE OF PUBLICATION

February 10, 2023

GEOGRAPHY

North America

LICENSE

**Electronic - See Pricing
Tab for Fair Use
Agreement**

FORMAT

Microsoft Excel

AUTHOR(S)

Greg Buzek

Jerry Sheldon

Lee Holman

Titles included are the following:

Web, Ecommerce, Social Media

VP Merchandising, Chief Merch. Officer

CMO

CIO/CTO

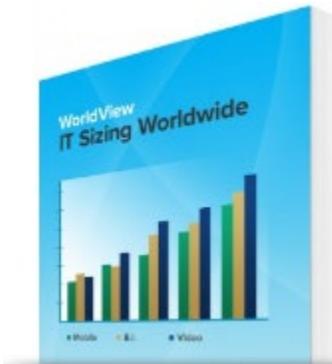
CFO/COO

VP of IT

Loss Prevention

Store Operations

For more information and to download a complete outline, [see the product on our website.](#)



WorldView – IT Sizing Worldwide

\$24,000.00

Licenses Available: **Enterprise** \$24,000 USD

This product can be purchased in total or as a subset. Price reflects total model cost

Updated to consider inflation, fuel prices, war in Ukraine, economic slowdowns.

Retail and hospitality industries are in a massive overhaul of retail systems as they merge eCommerce, mobile, and catalog channels with the store. Whether it's central order management, data visualization and predictive analytics, beacons, or core merchandising and POS systems, WorldView tracks and forecasts this spend. Then there are the emerging technologies such as AI/ML, Location Based Marketing, and Prescriptive Analytics. You need the right outside data for your forecasts.

Although there are studies that track certain components or “hot” technologies that are released each year, there has yet to be a comprehensive model that tracks IT Spending by line of business category, by segment, and by region of the world until now. With **Retail WorldView** forecasts on over 300 categories of hardware, software, SaaS, services, and labor/overhead, IHL has developed the most comprehensive IT sizing model in the retail industry.

Don't base your forecasts only on internal projections! Get outside objective numbers.

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

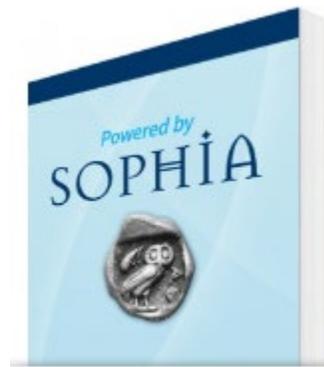
Hardware, Software, SaaS, Services, and Labor/Overhead for the following Line of Business Categories:

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
Fast Food
Bar/Restaurant
Lodging
Entertainment:Casinos and Cruises
Entertainment:Museums, Theme Parks, Theaters, Others

For more information and to download a complete outline, [see the product on our website.](#)



Insight IT Spend – Powered by Sophia

See pricing on our [website](#)

Whether it is trying to understand your true addressable market for a product launch or simply to benchmark your IT Spend against other retailers, the new **Insight IT Spend for Retail** product provides the level of detail necessary to truly understand the market.

One of the greatest challenges in business development is being able to take the forecasts from the analyst firms that are at a high level and try to understand how the market might change when your product enters.

Or for retailers, in a fast moving world where technologies such as mobile, social media, and business intelligence are radically transforming retailers, how can you benchmark your spending verses your competition. **Insight IT Spend for Retail** does just that, providing you the data you need to make the right decisions the first time with the backup you need for your management.

For more information and to download a complete outline, [see the product on our website](#).

DATE OF PUBLICATION

February 10, 2023

GEOGRAPHY

Worldwide

FORMAT

Data Service

AUTHOR(S)

Greg Buzek

Jerry Sheldon

Lee Holman



RAPID POS

See pricing on our [website](#)

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.

Typically, a POS engagement consists of two separate and distinct phases:

1. **POS RAPID Project Toolkit** – Scope and Objectives, requirements definition, RFP, and vendor evaluation.
2. **Deployment Rapid Project Toolkit** – Project Launch, including project planning, phasing, pilot, and deployment management.

You may choose to use us for either or both phases, to accelerate your project timelines and drive the POS application selection process from vendor evaluation to project planning to full deploy.

For more information contact us at ihl@ihlservices.com.

FORMAT

Microsoft Excel

LICENSE

**Enterprise - See Pricing
Tab for License Details
Fair Use Policy**

GEOGRAPHY

North America

AUTHOR(S)

**C-Core Consulting
Group**

Custom Research

IHL provides a wide range of custom market research and market analysis services. We have collaborated with vendors to identify market opportunities for information technology products to retailers worldwide. Below are just some of the ways we have helped customers in the past.

- Custom Surveys and White Papers
- Review of the current competitors and market potential for an innovative kiosk system
- Review and analysis of the international POS market shipments and installed base for a vendor who was looking to release a complementary product
- Identification and analysis of the top potential resellers for a retail hardware/software provider
- Company analysis and their market for the purpose of a make/buy decision. Reviewed from the perspective of a supplier relationship or potential acquisition
- Review of the major channel strategies of key IT vendors. Identifying the best practices and making recommendations to enhance the distribution of their products, thus lowering SG&A expense.

The above are just examples. The very nature of Market Research is that it is custom. No two projects are ever the same and no two customers are the same. We can collaborate with you to design the best approach for you.

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

Speaker's Bureau

Do you need a keynote speaker who can address retail and technology trends?

Whether it is mobile technologies, convergence of the store and ecommerce or general retail trends, *IHL has a speaker for your customer or internal event.*

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. We have also provided keynote presentations for internal and external sales meetings for companies such as Oracle, Aptos, NRF, Visa USA, Epson, Toshiba, Infor, Microstrategy, Apple, NCR, Cayan, Level 10, Verifone, Fujitsu Transaction Solutions, Flooid, Toshiba 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

All of IHL Group's generally available research products and databases are electronic licenses and can be shared only according to the license purchased. The license does not extend to joint ventures or other partnerships unless a distributable license is purchased.

The research reports and databases cannot be distributed in whole or in part beyond the license purchased without express written approval from IHL Group. The exception to this is for a mailing list generated from the database that is being used for the exclusive use of fulfillment by an outside third party. In this case, the mailing list can be used by the third-party to fulfill the needs of the purchasing organization only.

The purchasing company may quote components of the data (limited use) in presentations to customers such as specific charts. This is limited to percentage components, not individual unit information. Unit data cannot be shared externally without express written approval from IHL Group. All references to the data in presentations should include credit to IHL Group for the data.

The purchasing company can reference qualitative quotes in printed material with written approval from IHL Group.

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.