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

Publication Date: February 21, 2019
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 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 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.
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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)](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)](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.

**Current Studies**

- Competitive Market Leaders – When and Why Vendors Win
- Stored Advantage – Why Leading Retailers are Doubling Down on Stores
- AI/Machine Learning in Retail
- Personalizing the Shoppers Journey
- Prime Challenge – Retail’s Opportunity
- Payments Driven POS Study (Rise of Fintech)
- Mid-market POS Software
- Order Management Systems in Retail
- IoT Potential in Retail
- Retail Services Study
- Hospitality Software and Software as a Service
- Total Retail Software and Software as a Service
- Worldwide Retail Hardware
- Total Retail POS Software
- Merchandising and Supply Chain Systems
- Retail Analytics: Actionable Data for Real Results
- Unified Commerce Study
- Total Store Systems Software

* Studies can be replaced with other IHL research studies.
Below is a chart of the Advisory Levels and what is included.

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*Sophia Lead Generation and WorldView can be added to any level as additional cost.

Key Differentiators of the Retail Executive Advisory Program (REAP)

- **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 just limited to select individuals.**

For complete details, see our website or contact us at reap@ihlservices.com.
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](#).
Competitive Market Leaders – When and Why Vendors Win

$4,995.00

Licenses Available: Enterprise $4,995USD

Who is really winning among IT Vendors? Who are customers increasing business with in 2019, when does SAP win versus Oracle versus NCR versus SalesForce/Demandware or Aptos or Toshiba? When do they lose business? What are the highest priorities for each vendor’s customers? Are their customers growing faster than the market, increasing IT Spend or decreasing? Are they increasing store counts or decreasing? How fast are they moving to the cloud? Are there customers more likely to be investing in Upgrades to existing technologies or Transformational IT Spend to compete with Amazon? And finally, how do they drive innovation – internally, through partners or innovation labs?

This is just some of the data that is included in this research. We surveyed over 73 retailers with revenues over $500m in sales that operate with stores in 87 retail segments. This is what they said, who is winning in their business and why. Competitive profiles in this study for Accenture, Amazon, Apple, Aptos, AT&T, Capgemini, Cisco, Cognizant, Diebold Nixdorf, Epicor, Fujitsu, HP Inc., HP Enterprise, IBM, Infor, Infosys, JDA, Manhattan Assoc., Microsoft, NCR, Oracle, Pitney Bowes, PwC, SalesForce, Samsung, SAP, SAS, Tata Consultancy Services, Toshiba Global Commerce, Tyco Retail, Verizon, Wipro, and Zebra.

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 Executive Advisory Program

**Stored Advantage – Why Leading Retailers are Doubling Down on Stores**

$3,995.00 – $4,995.00

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

2018 ended on a very high note in retail for North America. As an economy in the US, retail sales were up over $242b for the year ending 2018. More than the entire retail GDP of South Korea. What does that mean for 2019?

In this collaborative study with RIS News you will see a view of what winning retailers are investing in for IT in 2019 vs. average or laggard retailers. Are we in the midst of a POS Refresh? How are changes in customer experience driving customer engagements and how retailers are fulfilling orders from various touchpoints? 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? And finally, which emerging technologies such as AI, Machine Learning, Edge Computing, Conversational Commerce, SDWAN, Beacons, IoT, Prescriptive Analytics, Big Data integrations and RFID are seeing growth in investment vs. declines?

With responses from 220 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 and others who might have a vested interest in the North American retail market. The complete outline with chart titles is below.

For more information, see the [website here](#)
Retail Executive Advisory Program

Total Retail IT Market
$4,995.00

Licenses Available: Enterprise $4,995USD

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.

This particular report looks at the overall Retail IT Market Worldwide. Unlike the Competitive Market Leaders which is a survey, this study reviews the overall market as is.

Who are the real leaders? What are the real rankings? Who are the leaders in the Retail IT market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach with a single view of the customer? 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 though and prosper in the Era of Intentional Innovation.

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.

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For more information and to download a complete outline, see the product on our website.
Retail POS Software

$4,995.00

Licenses Available: Enterprise $4,995USD

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

*Who are the real leaders? What are the real rankings? Who are the leaders in the Retail POS Software market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach with a single view of the customer?* It's all here.

This product includes rankings for POS Software companies WW as well as North America. Positioning charts are also available in these regions for Food/Drug/Convenience, General Retail and Hospitality sectors. Finally, competitive profiles are included for the top 15 vendors showing their size of business and how that business is distributed by sector.

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 though and prosper in the Era of Intentional Innovation.

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.

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For more information and to download a complete outline, [see the product on our website](#).
Licenses Available: Enterprise $4,995USD

This particular report looks at the overall Hospitality POS Market Worldwide.

Who are the real leaders? What are the real rankings? Who are the leaders in the Hospitality Hardware market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach with a single view of the customer? It's all here.

This research includes rankings for POS Software companies WW as well as North America. Positioning charts are also available in these regions the Hospitality sectors. Finally, competitive profiles are included for the top 15 vendors showing their size of business and how that business is distributed by sector.

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For more information and to download a complete outline, see the product on our website.
Licenses Available: Enterprise $4,995USD

This particular report looks at the overall Retail and Hospitality IT Services Market worldwide market and includes forecasts through 2020 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.

- **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.
Retail Executive Advisory Program

- **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 though 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.

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For more information and to download a complete outline, see the product on our website.
The Retail SaaS Market is exploding worldwide for two main reasons: retail in emerging economies is expanding, and enterprise 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). IHL projects the worldwide software-as-a-service market will grow 213% from $10.6Billion today to over $33.2B in 2022.

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 SaaS Market Worldwide.

Who are the real leaders? 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 via the Cloud? 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.

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For more information and to download a complete outline, see the product on our website.
Licenses Available: Enterprise $4,995USD

This particular report looks at the overall Retail Hardware Market Worldwide.

*Who are the real leaders? What are the real rankings? Who are the leaders in the Retail Hardware market? Which vendors are leading in sales, innovation, market reach and can implement a complete Unified Commerce approach with a single view of the customer? 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 though and prosper in the Era of Intentional Innovation.

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.

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

$4,995.00

Licenses Available: Enterprise $4,995USD

In the next 3 years, over $57.4b will be spent by retailers on Store Systems Software, SaaS and Maintenance. Which vendors are poised to capitalize on this market?

This particular research looks at the overall Total Store Systems Software Worldwide as well as a specific look at North America. It covers broad range of technologies like POS, Workforce Management, Store Level Inventory Management, Kiosks, Loss Prevention, Mobile Devices and other key systems at the store level.

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

Companies covered in this research include: Agilysys, Aptos, Ceridian, Concrete Platform, Demandware, Gilbarco, GK Software, Google, Heartand Payment Systems, HotSchedules, Intuit, Island Pacific, Kronos, LS Retail, Microsoft, NCR, Netuite, Oneview Commerce, Oracle, PCMS, Reflexis, SAP, Shopify, Starmount, Square, Toshiba Global Commerce, Veras Retail (formerly JDA’s Store Systems), Wincor-Nixdorf

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.

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.

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For more information and to download a complete outline, see the product on our website.
The Retail Software Market is exploding worldwide for two main reasons: retail in emerging economies is expanding, and enterprise 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). *IHL projects the worldwide software market will grow 55% from $57.6 Billion in 2017 to $89.3 Billion in 2022.*

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 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.
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, 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.

For more information and to download a complete outline, see the product on our website.
EMEA Retail POS Terminal Market Study

$3,295.00–$3,995.00

Licenses Available: Single User $3,295USD, Enterprise $3,995USD

Macroeconomic issues in the Europe/Middle East/Africa region made for a tough 2018. From Brexit, the influx of immigrants, terrorism in several countries and uncertainty on the global economy from the US election all added up to a drag on the overall economy of the region, yet POS opportunities still abound.

Our 22nd annual EMEA POS report 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 2016 and those that will help form market decisions in the future. It also includes forecasts for shipments through 2021.

For more information and to download a complete outline, see the product on our website.
While the North American and EMEA regions experienced satisfactory POS shipment growth in the current economy, the strong growth in the Asia/Pacific region continues to be a highlight of the worldwide POS market. China and India continue to expand, and their swelling retail ranks will continue to drive growth in 2019 and beyond.

Our Asia/Pacific POS Market Study has 24 figures in 51 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 2018, and it includes estimates for shipments and installed base through 2023. 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.

For more information and to download a complete outline, see the product on our website.
The market for POS in LATAM continues to grow despite macroeconomic turmoil and geopolitical issues in several countries. Large western retailers continue to expand in the market, bringing new POS terminals with them.

These trends and more are in our latest study. Our Latin/South America POS terminal market study is 46 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 (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.

Additionally, the report covers emerging trends and influences that affected the market in 2018 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 2023.

For more information and to download a complete outline, see the product on our website.
Three years after the press was announcing the demise of the Retail POS Terminal market in North America, Point-of-Sale technology is anything but dead. POS shipments have actually grown at significant rates rather than declining. There are some key trends related to Unified Commerce that are making the refresh of traditional POS technology even more important than previous years.

This study focuses on the Retail POS market in North America for 2018-2023. 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 2014 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 2023.

As we have for the past few years, we also include complete hospitality segments as part of the report.

For more information and to download a complete outline, see the product on our website.
North American Hospitality POS Terminal Study

$1,695.00–$1,995.00

Licenses Available: Single User $1,695USD, Enterprise $1,995USD

This report focuses on the Hospitality POS market in the United States and Canada, challenges from Mobile devices and opportunities for growth. Its 15 figures describe shipments, installed base and trends analysis of POS devices based on processor speed and operating system choice. Additionally, the report covers emerging trends and influences that affected the market in 2018 and those that will help form market decisions in the future. It also includes market value for the installed base and a forecast for shipments and installed base through 2023.

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.

For more details see the link here.
There is no one size fits all for retail and for solutions. The needs differ by retailers size, by sub-segment, and even by region. This 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 by region (North America, Europe/Middle East/Africa, Latin/South America, and Asia/Pacific).

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 track the number of stores, cashpoints and what is installed for the POS device in that environment. Finally, there is a component regarding the way that EFT/credit card payment is accepted at the lane.

Pricing is based on regions and number of segments.

For more information, pricing and to see examples, see the product on our website or contact us at ihl@ihlservices.com.
Retailers are racing to compete with Amazon. To do so they must get to a single version of the truth on customers so that their stores become an advantage. 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.

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.
Who is really winning among Merchandising and Supply Chain software vendors. Who are customers increasing business with in 2016, when does SAP win verses Oracle verses Manhattan Associates verses JDA verses Demandware or Aptos or NetSuite of Infor? When do they lose business? What are the highest priorities for each vendor’s customers? Are their customers growing faster than the market, increasing IT Spend or decreasing? Are they increasing store counts or decreasing? How fast are they moving to the cloud?

This is just some of the data that is included in this research that includes rankings by revenue for both Merchandising and Supply Chain products, as well as IHL Insight MarketView positioning quadrants for each by segment group.

Retail vendor profiles in this study for
- Aptos, dunhumby, eBay
- Enterprise, IBM, JDA, Manhattan Associates, One Networks, Oracle, Revionics, Symphony, SAP, and Teradata.

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 only available as part of the IHL Retail Executive Advisory Program.

For more information and to download a complete outline, see the product on our website.
Mobile POS Software is one of the fastest growing areas in retail technology, but it is not growing at the same speed in all retail segments or even by the size of retailers.

This research tracks the installs and shipments of software licenses in Mobile POS instances. It reviews the smaller retailers “mom and pop’s” that began the mobile POS trend and that are seeing tremendous technology disruption for traditional POS terminals. It also covers the forecast for the fast rise in adoption of mPOS in the enterprise retailers.

You would use this research to answer the following questions? How big is this market? How fast is it growing? Which vendors are winning? How much share does Square, Level Up, Shopkeep have? Are these vendors doing better than Enterprise vendors like Oracle, Toshiba and Starmount? How does the market growth differ for Enterprise versus SMB? This research will tell you.

This research provides shipments and installed base on a quarterly and annual basis for vendors such as Square, Intuit, Shopkeep, Level Up, First Data, Paypal, Revel, NCR and Pay Anywhere at the SMB level, then Oracle, Infor, NCR, Aptsos, Toshiba, and many others for use of mobile devices for POS. We look at shipments and installed base by segment and tier.

This data is 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.
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, Google, Motorola Solutions, Samsung, HP, Lenovo, Dell, 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.
For several years the Mobile POS (mPOS) market has taken off, but in a somewhat bifurcated manner. While among smaller retailers, mPOS has truly been transforming, replacing traditional POS for new retailers at a rapid pace, the use of mPOS as a standard every day product in enterprise retailers was delayed due to EMV and the drive to Unified Commerce. But in mid-2016 the Mobile POS market among the largest of retailers is starting to hit its growth strides and this has continued in 2018 as retailers update their customer experience due to declining foot traffic.

Without question, the opportunity is staggering as some retailers have seen upwards of 25% increase in sales per transaction when mobile is used.

The enterprise retailers who are deploying now have a much more mature view of the market than the early adopters. They have the systems in place to actually benefit from MPOS and are not as concerned with the WOW factor or cool factor of the technology but rather the functionality that increases sales.

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 2021.

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 Mobile POS Software Vendor Data Service.
Sophia – Wisdom for IT

See pricing on our [website](#)

$195 per segment per month per region for your enterprise.

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 5,000 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.

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** – Over 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 SPA 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 samples, [see the product on our website](#).
Need a Mailing List of Key Retail Technology Decision Makers? People like CIOs, VPs of MIS, Store Operations, CEOs, etc.?

For this exercise we leverage the Sophia system but for a single instance. 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 – $1Trillion Any Combination of the Above

We charge .40 per record for a custom query or mailing list.

Our minimum query is $750. For more information contact us at ihl@ihlservices.com.
You’ve spent the money on the booth at the NRF show, 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 NRF to get those meetings setup. 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 10,000+ likely attendees (verified in the last month). All information can be sent electronically and used multiple times.

**Titles included are the following:**

- Web, Ecommerce, Social Media
- CMO
- Marketing/Business Development below CMO
- CIO/CTO
- CFO/COO
- VP of IT
- Operations

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

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.

Includes forecasts and growth rate for cloud solutions as well as sizing for mobile, EMV, Omnichannel and Big Data tools as well as traditional retail technology components.

For more information, see the product on our website or contact us at ihl@ihlservices.com
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 see the product on our website or contact us at ihl@ihlservices.com.
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.
The RAPID Fresh Project Toolkit provides retailers with the weapons to improve margins dramatically in perishables and Fresh Item Management that distinguish retailers from the supercenters. When done properly, an efficient fresh item management process not only saves cost in shrink, but helps increase sales through appropriate freshness and presentation. The RAPID Fresh Project Toolkit helps retailers define their core opportunities and assist in the selection of the technologies to achieve great results.

Developed by grocers in partnership with C-CORE Consulting Group, the RAPID Fresh Project Toolkit has the most extensive set of fresh requirements in the business. The disciplined approach also keeps the business fully accountable for all phases of this challenging but essential project. From Shrink Capture to Production Planning, Inventory Management and Suggested Orders, the opportunity to reduce shrink and improve margin and efficiency in the fresh departments is critical to a fresh-focused retailer’s success.

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

See pricing on our [website](#).

The RAPID Workforce Management Toolkit gets at the heart of the store employee to retailer relationship, providing a comprehensive set of worksheets to quickly and effectively help you make a decision on the most appropriate management system for your largest variable cost – your labor at the stores.

For more information contact us at [ihl@ihlservices.com](mailto:ihl@ihlservices.com).
Designed in partnership with C-CORE Consulting Group, the RAPID Maintenance Project Toolkit provides a systematic approach to managing your technology hardware assets. It is designed to reduce your maintenance costs, simply your contracts and process for vendor negotiations, and improve service levels.

Here are just a few of the metrics that customers have realized:

- Reduced internal labor per Help Desk incident, resulting in a savings of $1.50 per help desk call.

- Up to a 20% savings in overall maintenance costs through improved negotiations and recognition by both sides on what is driving costs.

- A 5% reduction in discounts through contract expansion and extensions by identifying core vendors.

- Overall savings of $4 Million in maintenance costs for one customer.

For more information contact us at ihl@ihlservices.com.
While most organizations typically perform annual planning sessions, they usually fall short in building a well-designed and effective three-year plan. This lack of long-term planning prevents the correct sequencing and prioritization of multiple strategic initiatives into a cohesive structure that delivers the following:

- Focus on key initiatives
- Understanding of cross functional impact on your organization
- Flexibility to adjust and re-prioritize as your strategy changes
- Balancing of business and IT resources and budgets

Typical retail plans are a list of potential initiatives submitted by various business units. They are not prioritized across the enterprise, so they lack a cohesive order. Worse, they are PowerPoint slides loaded with Industry buzzwords related to executive hot buttons that provides only a high-level end state picture, not the journey to get there.

The roadmap is the properly sequenced set of initiatives that gets you to the desired end state efficiently, on time and within acceptable risk levels. It is the guide used to prioritize WHAT should be done, WHEN (initiative schedule and phases) and, by WHOM (Initiative Owners), and WHERE (countries, regions, banners).

For more information contact us at ihl@ihlservices.com.
IHL provides a wide range of custom market research and market analysis services. We have worked 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 work 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.
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, PCMS, Epson, Toshiba, Infor, Microstrategy, Apple, NCR, Level 10, Verifone, 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.
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For any questions regarding this policy, please contact us at 888-IHL-6777 or email us at ihl@ihlservices.com

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