

Index

Table of Contents

Table of Contents.....	i
List of Figures.....	viii
Executive summary.....	1
1 POS terminals and ATMs.....	3
1.1 The card payments industry.....	3
1.2 Payment infrastructure.....	3
1.2.1 Overview of the POS terminal market.....	4
1.2.2 POS terminal form factors.....	5
1.2.3 Overview of the ATM market.....	7
1.2.4 ATM form factors.....	9
1.3 Evolution of electronic payments	10
1.3.1 EMV migration.....	10
1.3.2 Adoption of wireless M2M communication	12
1.3.3 Rollout of NFC-ready terminals	14
1.4 POS terminal vendors.....	15
1.4.1 BBPOS	16
1.4.2 Brookfield Equinox.....	17
1.4.3 CCV	17
1.4.4 CyberNet	18
1.4.5 ID Tech	18
1.4.6 Ingenico.....	18
1.4.7 Newland Payment Technology	20
1.4.8 PAX Technology.....	20
1.4.9 REA Card.....	22
1.4.10 Spire Payments	22
1.4.11 SZZT Electronics	23
1.4.12 VeriFone	23
1.4.13 Worldline	24

1.5	ATM manufacturers and connectivity solution providers	25
1.5.1	Contour Networks	26
1.5.2	Diebold Nixdorf.....	26
1.5.3	Digi International	27
1.5.4	DPL Group.....	28
1.5.5	NCR	28
1.5.6	OptConnect	29
1.5.7	Triton	29
2	Vending machines	31
2.1	Overview of the vending machine industry	31
2.2	Vending industry players.....	32
2.2.1	Vending technology providers	32
2.2.2	Vending machine manufacturers	33
2.2.3	Product suppliers	35
2.2.4	Vending operators.....	36
2.3	Payment systems	37
2.3.1	Coin mechanisms and bill validators	38
2.3.2	Cashless payments	38
2.3.3	Mobile phone payments and NFC	40
2.4	Vending telemetry and software.....	41
2.4.1	Remote monitoring of vending machines	42
2.4.2	Vending management systems.....	43
2.5	Connected vending machines.....	44
2.5.1	Europe	45
2.5.2	North America	46
2.5.3	Rest of World	47
2.6	Vending telemetry and cashless payment solution providers	49
2.6.1	BiTX (Your Voice)	49
2.6.2	Cantaloupe Systems	50
2.6.3	Connected Molecules	51
2.6.4	Deutsche Telekom	52
2.6.5	Distrilog	54

2.6.6	Ingenico Group	54
2.6.7	Materna	55
2.6.8	Mecsel	56
2.6.9	Nayax.....	57
2.6.10	On Track Innovations	59
2.6.11	Prosa	60
2.6.12	Smarcom.....	61
2.6.13	Televend (INTIS).....	61
2.6.14	USA Technologies.....	62
2.6.15	Vendon	64
2.6.16	Vendwatch Telematics	66
2.6.17	Vianet Group	66
2.7	Vending machine manufacturers	67
2.7.1	Automated Merchandising Systems	69
2.7.2	Azkoyen Group	69
2.7.3	Bianchi Vending Group	70
2.7.4	Crane	70
2.7.5	Deutsche Wurlitzer	72
2.7.6	FAS International	72
2.7.7	Fastcorp Vending	73
2.7.8	Fuji Electric	73
2.7.9	Jofemar.....	74
2.7.10	N&W Global Vending	75
2.7.11	Rheavendors Group	76
2.7.12	Royal Vendors (Coinco)	77
2.7.13	SandenVendo.....	77
2.7.14	Seaga	78
2.7.15	Sielaff.....	79
2.7.16	Westomatic	80
2.7.17	Wittern Group	80
2.8	Vending operators	81
2.8.1	Aramark	82



2.8.2	Canteen	83
2.8.3	Coca-Cola Amatil.....	84
2.8.4	Pelican Rouge Group	84
2.8.5	Selecta.....	85
2.8.6	Sodexo	86
3	Parking meters.....	89
3.1	The parking industry.....	89
3.1.1	Parking industry players.....	89
3.1.2	Single-space and multi-space meters in Europe and North America.....	90
3.1.3	Pay-by-phone parking.....	92
3.2	Connected parking meters	93
3.2.1	Mobile data communication solutions for parking meters.....	93
3.2.2	Connected multi-space parking meters	95
3.2.3	Connected single-space parking meters	96
3.3	Parking solution vendor profiles	97
3.3.1	Cale Group	97
3.3.2	Came Parkare Group	99
3.3.3	CivicSmart	99
3.3.4	Hectronic	101
3.3.5	IEM	101
3.3.6	IPS Group.....	102
3.3.7	MacKay Meters.....	102
3.3.8	METRIC	103
3.3.9	Parkeon	104
3.3.10	POM.....	105
3.3.11	T2 Systems.....	105
3.4	Private parking operators	107
4	Public transport ticketing	109
4.1	Modal split of passenger transport.....	109
4.2	Bus and rail fleets	111
4.3	Fare collection systems	112
4.3.1	Fare payment	113

4.3.2	Fare collection devices.....	115
4.3.3	Installed base	116
4.3.4	Mobile data communication solutions	117
4.4	Fare collection system vendors.....	118
4.4.1	Bytemark	118
4.4.2	Cubic Transportation Systems.....	119
4.4.3	FARA.....	121
4.4.4	Indra	122
4.4.5	INIT	123
4.4.6	IVU	125
4.4.7	Masabi	126
4.4.8	METRIC	127
4.4.9	Scheidt & Bachmann	129
4.4.10	Thales	130
4.4.11	Vix Technology.....	132
4.4.12	Xerox	133
5	Digital signage	135
5.1	Overview of the digital signage industry	135
5.2	The digital signage value chain.....	135
5.2.1	Display screen vendors.....	136
5.2.2	Media player vendors.....	137
5.2.3	Content management system providers.....	138
5.2.4	Installers, system integrators and network operators.....	138
5.3	Application areas	139
5.3.1	Retail.....	139
5.3.2	Office and enterprise	141
5.3.3	Healthcare	141
5.3.4	Transportation	142
5.3.5	Education	143
5.3.6	Foodservice	144
5.3.7	Outdoor signage	146
5.4	Evolution of the digital signage industry	146

5.4.1	From non-connected to connected digital signs	147
5.4.2	Media player form factors.....	148
5.4.3	Display technologies	149
5.5	Media player vendors	150
5.5.1	Advantech	150
5.5.2	AOPEN	151
5.5.3	Arrow Electronics	153
5.5.4	BrightSign.....	154
5.5.5	Hewlett-Packard	156
5.5.6	IAdea	156
5.5.7	iBASE.....	157
5.5.8	Rikomagic.....	158
5.5.9	Shuttle	159
5.6	Display screen vendors	160
5.6.1	DynaScan	160
5.6.2	Elo Touch Solutions	161
5.6.3	Leyard and Planar	161
5.6.4	LG Electronics	163
5.6.5	NEC Display Solutions	164
5.6.6	Panasonic.....	166
5.6.7	Samsung Electronics	167
5.6.8	Sharp	168
5.7	Content management system providers	169
5.7.1	BroadSign	169
5.7.2	Cineplex Digital Media.....	170
5.7.3	Four Winds Interactive.....	171
5.7.4	Grassfish.....	172
5.7.5	Industry Weapon	172
5.7.6	Rise Vision	173
5.7.7	RMG.....	174
5.7.8	Scala (STRATACACHE)	174
5.7.9	Signagelive	176

5.7.10 STRATACACHE.....	177
5.7.11 Wondersign	178
6 Forecasts and conclusions.....	181
6.1 Wireless M2M in the retail industry.....	181
6.1.1 Cellular M2M device shipments	182
6.1.2 Cellular M2M network connections.....	184
6.2 Market trends and drivers.....	186
6.2.1 Uptake of wireless M2M in POS terminals is steady while NFC surges	186
6.2.2 ATMs in offsite locations benefit from cellular connectivity	188
6.2.3 Vending operators benefit from cashless payments and telemetry	188
6.2.4 The parking meter industry leads in the adoption of wireless M2M	190
6.2.5 Public transport ticketing will move to systems with real-time authorization....	190
6.2.6 Digital signage is becoming an important platform for digital marketing	192
6.3 Market forecasts	193
6.3.1 POS terminals	194
6.3.2 ATMs	204
6.3.3 Vending machines.....	205
6.3.4 Parking meters	208
6.3.5 Public transport ticketing.....	212
6.3.6 Digital Signage	214
Glossary	217

Index

List of Figures

Figure 1.1: Installed base of POS terminals and ATMs (World 2011–2015)	4
Figure 1.2: POS terminal density by country (World 2015)	5
Figure 1.3: Stationary and mobile POS terminals	6
Figure 1.4: mPOS devices	7
Figure 1.5: ATM density by country (World 2015)	8
Figure 1.6: Free-standing and through-the-wall ATMs	9
Figure 1.7: EMV implementation status (World 2015)	11
Figure 1.8: POS terminals with cellular connectivity by region (World 2015)	13
Figure 1.9: NFC-ready POS terminals by region (World 2015)	14
Figure 1.10: POS terminal shipments by manufacturer (World 2015).	16
Figure 1.11: PAX Technology POS terminals	21
Figure 2.1: Vending machine density by region (World 2015)	31
Figure 2.2: Examples of vending machines.....	33
Figure 2.3: Installed base of vending machines by country (EU 28+2 2015).....	34
Figure 2.4: Examples of product suppliers and brands	36
Figure 2.5: Examples of coin mechanisms and bill validators	38
Figure 2.6: Examples of cashless payment devices for open and closed systems	39
Figure 2.7: ePort G9 from USA Technologies supporting NFC-based mobile payments	41
Figure 2.8: Installed base of connected vending machines by vendor (World 2015).....	44
Figure 2.9: Connected vending machine vendor market shares (Europe 2015)	45
Figure 2.10: Connected vending machine vendor market shares (North America 2015).....	47
Figure 2.11: The MyWallet Kiosk payment terminal	53
Figure 2.12: Nayax's AMIT 3.0 telemetry device	58
Figure 2.13: Vendon's vBox 2 vending telemetry device	65
Figure 2.14: Product portfolios of vending machine manufacturers (2016)	68
Figure 3.1: Examples of connected single-space and multi-space meters	94
Figure 3.2: Share of connected multi-space parking meters by vendor (World 2016)	95
Figure 3.3: Share of connected single-space parking meters by vendor (World 2016)	96

Figure 3.4: Parking meter offerings by vendor	97
Figure 3.5: Selected European and North American parking operators.....	107
Figure 4.1: Modal split of passenger transport on land (EU and NA 2014)	110
Figure 4.2: Bus and rail fleets in public transport (EU and NA 2014).....	111
Figure 4.3: Evolution of fare payments	114
Figure 4.4: Fare collection device segments	115
Figure 4.5: Installed base of contactless fare collection devices (EU and NA 2016)	116
Figure 4.6: METRIC fare collection devices	128
Figure 4.7: Scheidt & Bachmann fare collection devices	129
Figure 5.1: Digital signage value chain.....	136
Figure 5.2: Examples of display form factors	137
Figure 5.3: Examples of DOOH network operators.....	139
Figure 5.4: Examples of digital signs in retail stores	140
Figure 5.5: Examples of digital signs in an office building	141
Figure 5.6: An example of a digital sign in healthcare.....	142
Figure 5.7: Information displays for transportation.....	143
Figure 5.8: Interactive whiteboard in a classroom.....	144
Figure 5.9: Digital menu boards	145
Figure 5.10: Infotainment program for coffee & bagel shop customers	145
Figure 5.11: Digital billboard.....	146
Figure 5.12: Local and remote management of digital signage networks	148
Figure 5.13: Media player form factors	149
Figure 5.14: Chromebox Commercial and Chromebase Commercial by AOPEN	153
Figure 5.15: BrightSign's lines of digital signage media players	155
Figure 5.16: Rikomagic's MK22 Plus, MK902II, MK36S and V5	159
Figure 6.1: Cellular M2M connections in the retail industry (World 2016)	182
Figure 6.2: Cellular M2M retail device shipments by region (World 2014–2020).....	183
Figure 6.3: Cellular M2M retail device connections by region (World 2014–2020).....	185
Figure 6.4: Deployment of NFC and cellular technologies (World 2014–2020).....	195
Figure 6.5: Cellular POS terminal shipments by region (World 2014–2020).....	196
Figure 6.6: Cellular POS terminal installed base by region (World 2014–2020)	197
Figure 6.7: NFC POS terminal shipments by region (World 2014–2020).....	199

Figure 6.8: NFC POS terminal installed base by region (World 2014–2020)	200
Figure 6.9: mPOS terminal shipments by region (World 2014–2020)	202
Figure 6.10: mPOS terminal installed base by region (World 2014–2020)	203
Figure 6.11: Installed base of wirelessly connected ATMs (EU and NA 2014–2020).....	204
Figure 6.12: Installed base of connected vending machines (World 2015–2020)	205
Figure 6.13: Connected vending machine market forecast (North America 2015–2020)	206
Figure 6.14: Connected vending machine market forecast (Europe 2015–2020)	207
Figure 6.15: Connected vending machine market forecast (Rest of World 2015–2020)	208
Figure 6.16: Multi-space parking meter market forecast (World 2014–2020)	210
Figure 6.17: Single-space parking meter market forecast (World 2014–2020)	211
Figure 6.18: Installed base of contactless fare collection devices (EU and NA 2014–20)	212
Figure 6.19: Digital signage display market forecast (World 2014–2020)	214
Figure 6.20: Digital signage connectivity technologies (World 2014–2020)	215