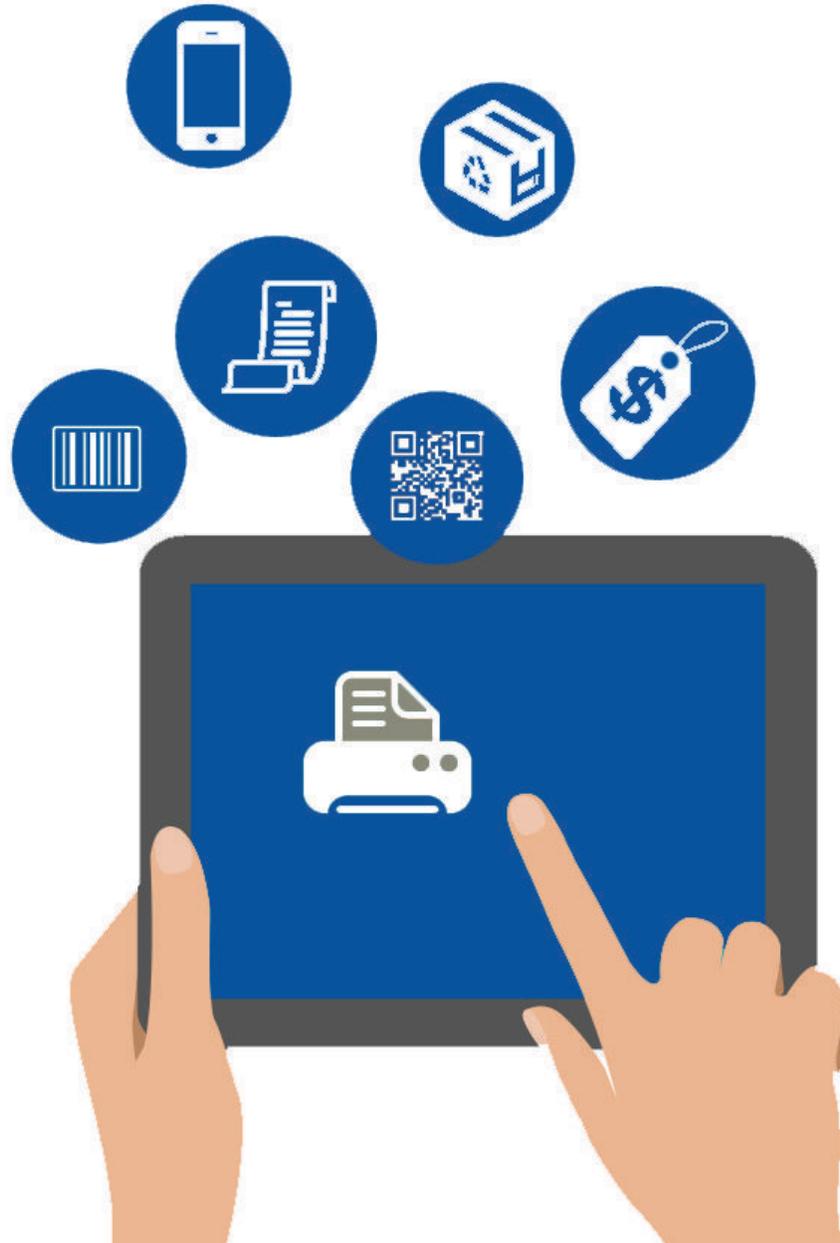


Dissecting The Demand For Mobile Printing In Retail



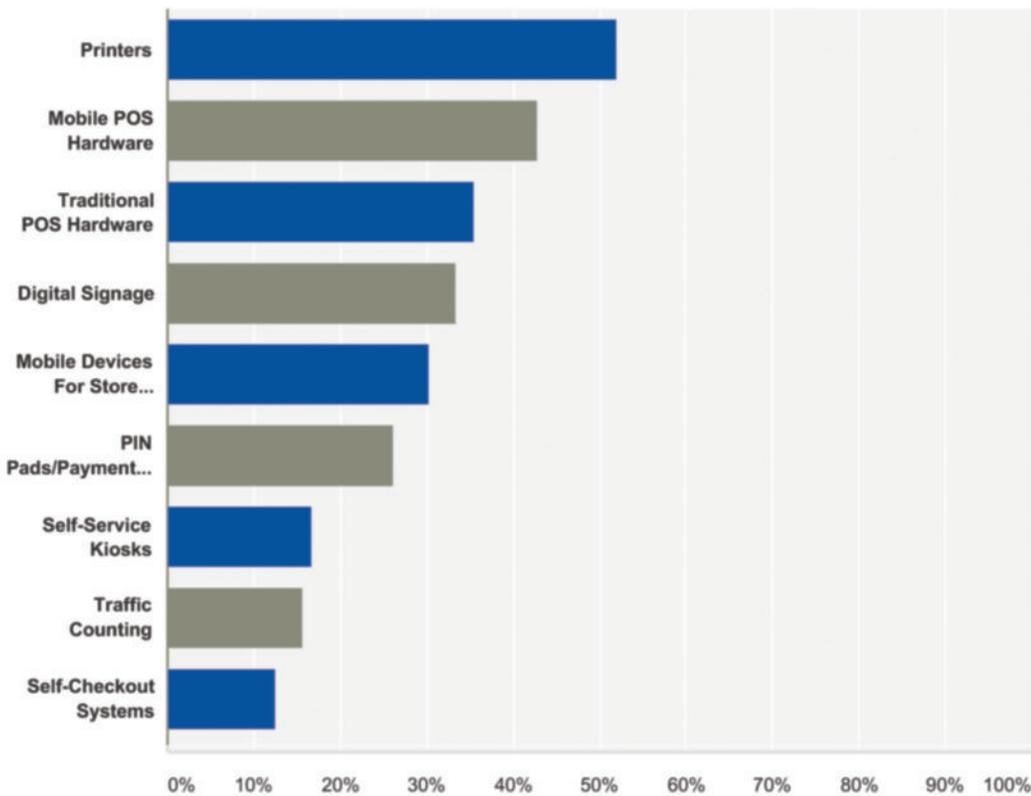
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Which merchants are making big plans for mobile, and what do they expect of their mobile printing solutions?

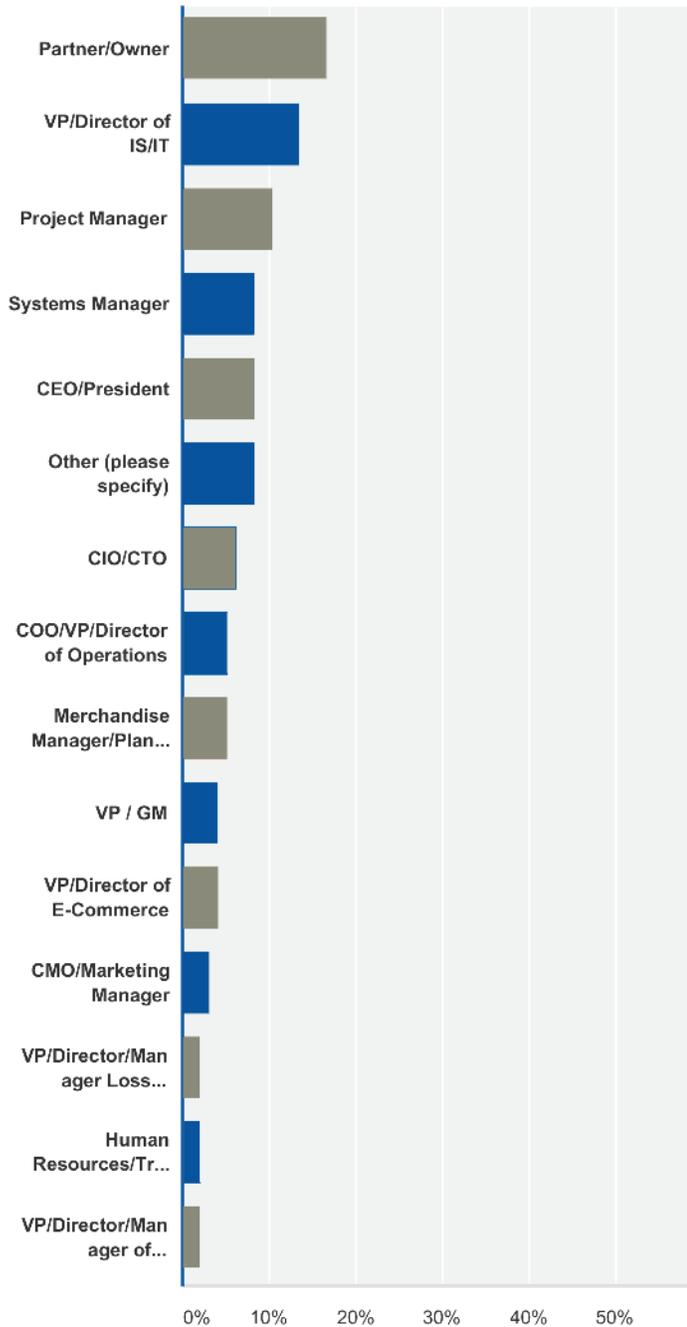
In Q4 2015, *Innovative Retail Technologies* magazine (IRT) surveyed 500 retailers from its subscriber base to determine the retail industry's tech spending priorities for the coming year. In that survey, which was reported in the November/December 2015 issue of the magazine, 29 percent of respondents indicated that printers were a spending priority, closely trailing digital signage (31 percent) and mobile POS hardware (35 percent).

In 2016, what IN-STORE HARDWARE does your company plan to invest in?



IRT followed the Q4 2015 survey effort with a separate Q2 2016 Mobile Printer Survey of 100 merchants underwritten by Brother International, this version specific to mobile printing purchase intentions, feature preferences, and buying criteria.

Which of the following best matches your current job title?



More than half of respondents to the Q2 2016 Mobile Printer Survey indicated that their organizations planned to invest in printers. Further, 43 percent indicated plans to invest in mobile POS hardware and more than 30 percent said they would invest in “non-POS-enabled” mobile devices for store associates.

That’s compelling news for makers, marketers, and resellers of mobile devices—particularly mobile printers. The survey data presented here creates an informed view of the market for mobile printers, printing accessories and peripherals, and the feature expectations of merchants across the spectrums of size and segment.

Who Answered The Survey?

The Q2 2016 Mobile Printer Survey drew responses primarily from small-to-midsize retail business owners, VPs of IS/IT, project and systems managers, and C-level executives. Responses were collected from a wide range of segments, including electronics/computer/cellular/office supply merchants (12.5 percent), grocery (10 percent) mass merchants (8 percent), and department store operators (7 percent). Other participants included retail services such as salons, health clubs and florists, home goods retailers including home improvement, furniture and décor, and apparel, footwear, jewelry, drug and c-store, books/music/video, automotive, and toy/hobby/pet merchants.

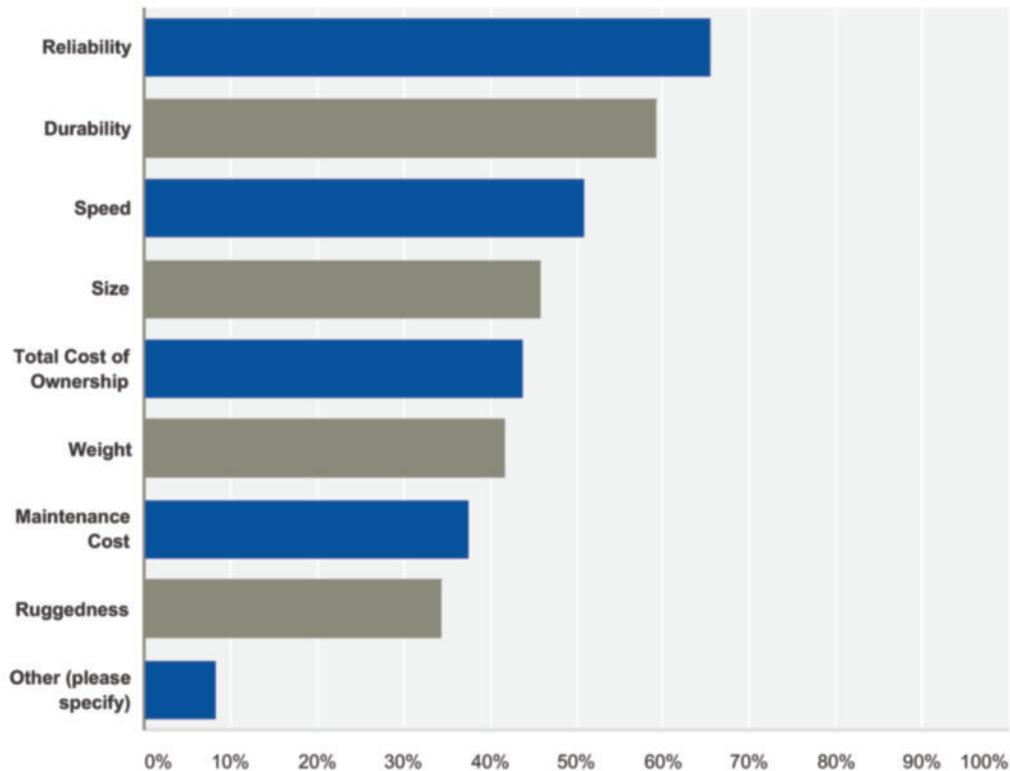
Nearly 50 percent of participating merchants operate fewer than ten stores; 14.5 percent run between ten and fifty sites, nearly a quarter run between 50 and 250 stores, and 13.5 percent operate more than 250.

Features And Accessories Desired

Asked what features are most important to the mobile printer purchase decision, 2/3 of our overall sample said reliability is priority number one. Nearly 60 percent said durability was a priority, and just over half said speed was of important. Size and weight were cited as important by 46 percent and 42 percent, respectively.

When we look specifically at larger merchants, however, those priorities change considerably. **Among retailers with more than 500 stores, speed becomes the priority for more than 91 percent of respondents, followed by reliability at 75 percent and size at 71 percent.**

What features of mobile printers are you most interested in?



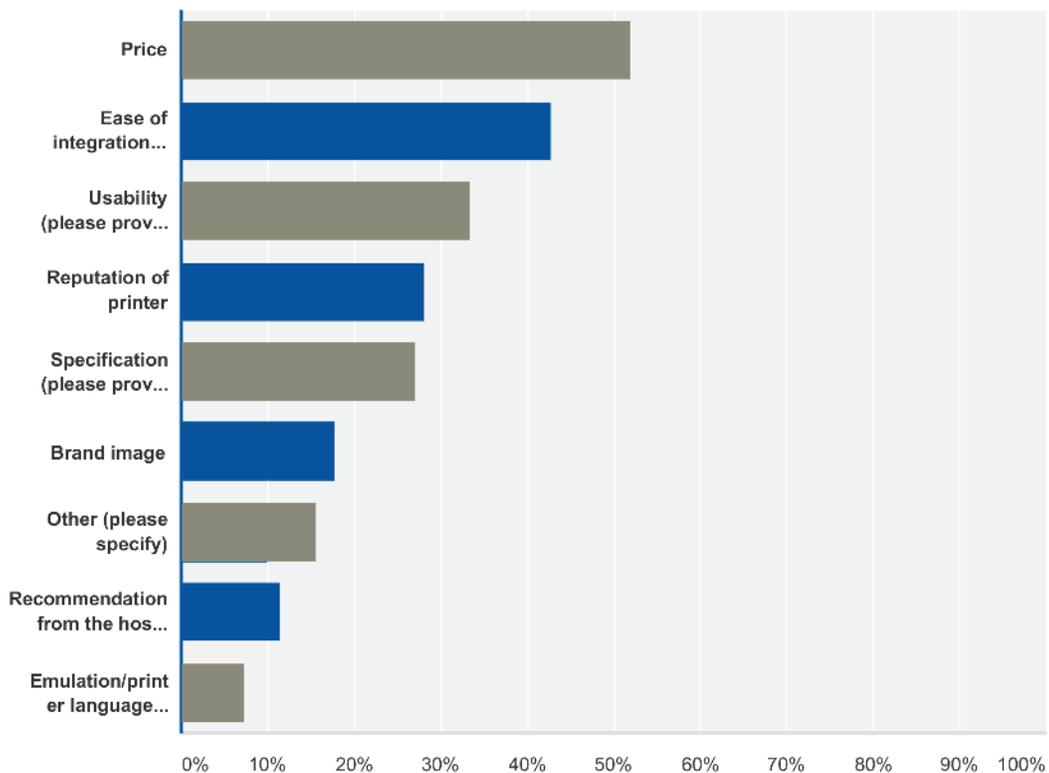
On the whole, most retailers are seeking small, lightweight printers that can be carried by associates on a belt clip. Half of merchants said this is their most desirable carry option, compared to approximately 35 percent who chose mobile carts and shoulder straps. Filtered by segment, merchants across the board followed this trend line with the exception of grocers. The majority of grocers prefer mobile carts for their printer-intensive store operations requirements.

Asked what mobile printing accessories are most used and desired, **Bluetooth, WiFi, spare batteries, and chargers** led the open-ended response count.

Mobile Printer Cost Considerations And Buying Criteria

While cost is king for our sample when taken on the whole, larger merchants are more concerned about ease of integration than price point. **More than 83 percent of merchants with 500 stores or more indicate that ease of integration is their top buying criteria**, compared to 43 percent of the entire sample. Usability is another key factor for large merchants; two thirds of 500+ store retailers consider ease of use a top purchasing criteria, as compared to just 36 percent of those with fewer than 100 stores.

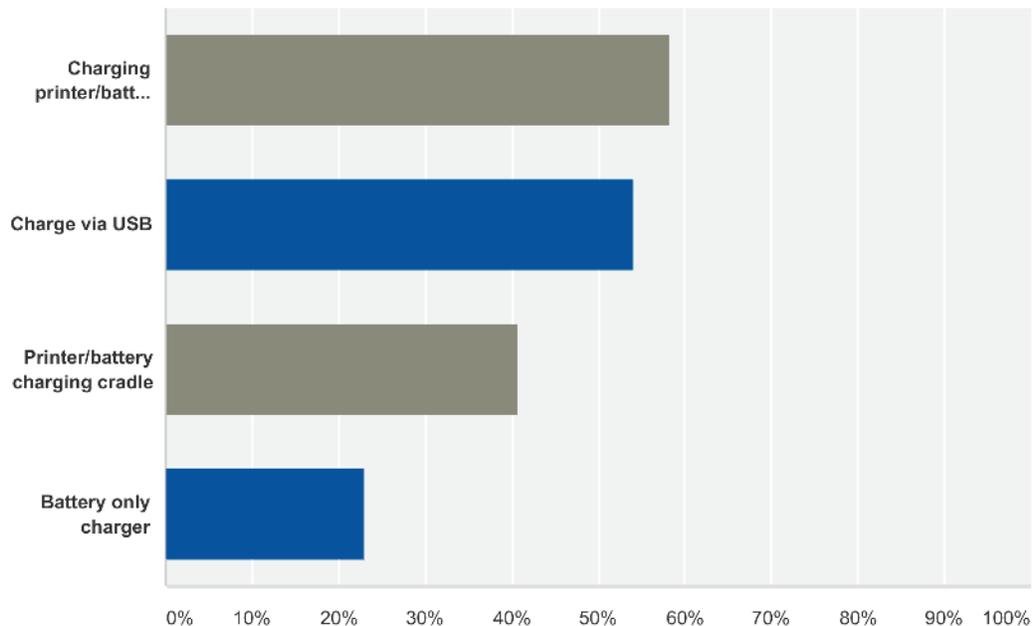
What factors do you consider when choosing mobile printers?



Smaller businesses are considerably more cost conscious. **A full 44 percent of merchants with fewer than 50 stores report that they would not consider purchasing mobile printers that cost more than \$300 per device, on average.** That's compared to the fifty percent of merchants with more than 500 stores who fully expect to pay up to \$500 per device. The brand reputation of the printer manufacturer is also significantly more important to large retailers than small; half of 1000+ store merchants said brand reputation is a top three consideration, as opposed to just 27 percent of merchants with fewer than 100 stores.

Logically, labor efficiency is a high priority for merchants large and small. In the context of their earlier-mentioned demand for spare batteries and chargers, we asked survey respondents to elaborate on their charging option preference—the largest contributing factor to mobile associate downtime. Most (58 percent) indicated that charging via direct connection to an AC power outlet as their preference, but USB and cradle were a close second and third at 54 percent and 41 percent, respectively. Again, these figures vary considerably among large and small merchants. **Those with more than 50 stores show a preference for USB charging options (68 percent)**, compared to the 21 percent of those with fewer than 50 stores who lean toward USB.

What charging options are of most importance to you?



How Much Mobile Is In The Works?

While there's an obvious correlation between the number of devices being deployed and the size of the merchant, our survey notes a distinct demand for mobile printing among electronics/computer/cellular/office supply stores. That category led responses among those planning to deploy 1-10 devices, 11-50 devices, 51 to 100 devices and 100 to 300 devices. **Grocers, mass merchandisers, and department stores were the leaders among those planning to deploy 301 or more mobile printers in 2016.**

Future Demands For Mobile Printing

Asked what features or functions they would you like to see in the next-generation mobile printer, multiple functionalities was the resounding theme. **When asked the open-ended question what feature or function would you like to see in the next-generation mobile printer, about 11 percent indicated the desire for increased functionality.**

A sampling of the desires shared by survey responders includes:

- *Scan a barcode, swipe a loyalty card, swipe a credit card, print receipts, show history of last purchase with date*
- *Ability to email customers receipts*
- *The ability to talk between printers*
- *Attached card reader or EMV ready insert for being able to read chip cards*
- *Work with multiple platforms*
- *Print customer receipts, print price labels, print order confirmations*
- *Ability to access multiple programs from computer while running mobile printer.*
- *Multi-function or all-in-one, a POS/printer*
- *Ability to take credit /debit cards in printer, also have a pin pad available*

Increased battery life and better print speeds were the second and third most referenced desires for future iterations of mobile printers, accounting for about 8 percent of responses each.

Six percent of participating merchants requested better and faster wireless/WiFi connectivity of next-generation mobile printers.

Five percent of survey participants indicated that longer lasting ink/toner cartridges were their primary desire, a tall order for printer manufacturers given the slightly greater number of merchants (6 percent) who said they want to see smaller/more compact/lighter printers on the market.

Other requests include:

- *Open source/more application integration*
- *Notifications/diagnostics/monitoring for low ink and memory*
- *Access to email for customer receipt delivery*
- *Ability to print in color*
- *More font selection*
- *Better usability/user interface/digital display*
- *More rugged/durable options for harsh environments*

Our 2016 Mobile Printer Survey illustrates healthy adoption of mobile printers across a wide spectrum of retail segments and sizes. Speed, size, power and connectivity are the market's primary desires.

That being said, it appears the proliferation of mobile devices in retail is wearing thin on the merchants charged with managing those devices and their power sources, as indicated by the leading requests for multifunctional devices and better battery performance. As the mobile device manufacturing industry moves in the "all-in-one" direction at the behest of their retail customers and competition from consumer-grade devices, mobile printer manufacturers play a pivotal role in enabling that evolution.

About Brother

Brother Mobile Solutions offers an entire family of label and receipt printers that make it easy for retailers to quickly print barcoded labels, tags and receipts right where they need them. Without wires. Without cords. Without a lot of training. Whether you're printing shelf edge labels, markdown tags, queue-busting QR code tickets, MPOS receipts, order pickup tickets, or warehouse and inventory labels – Brother printers deliver legendary reliability and the latest in Bluetooth®, Wi-Fi®, and Windows®, iOS®, and Android™ compatibility.

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