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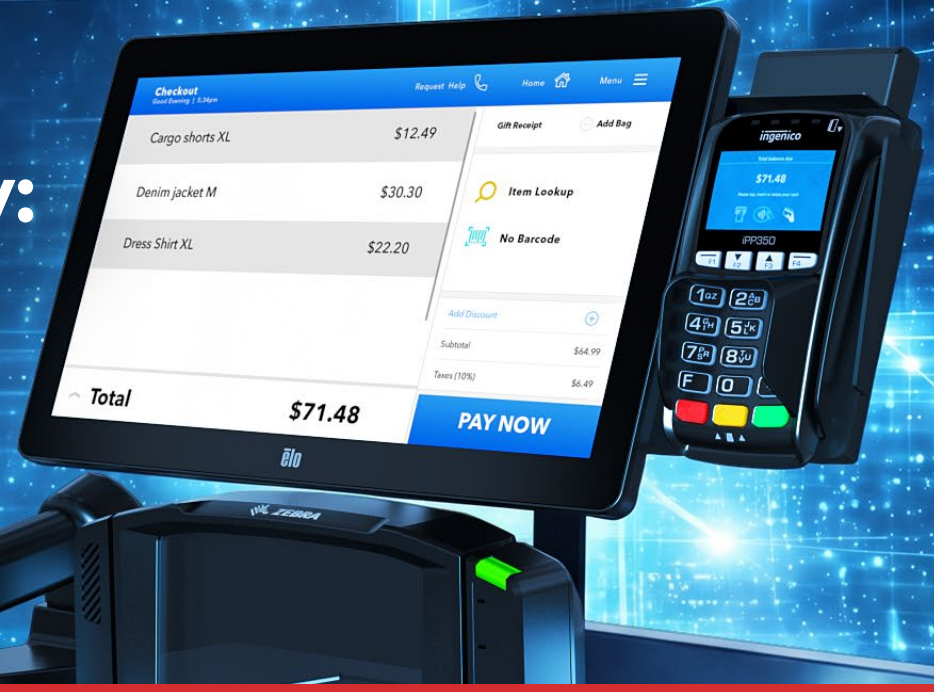
Self-Service Technology:

Powering The Modern In-Store Experience and Operations



April 28, 2026

Executive Summary

Self-service technology is rapidly becoming a defining feature of the modern in-store retail experience. Driven by rising labor costs, increasing operational complexity, and growing consumer demand for faster, more personalized interactions, these solutions are expanding beyond isolated use cases to play a central role across the store journey. Technologies such as self-checkout terminals, self-ordering kiosks, mobile scan-and-go, and smart carts are introducing customer-facing digital interfaces that create seamless touchpoints from product discovery and basket building to checkout—giving shoppers greater control at every stage.

Retailers that have already deployed self-service at scale are demonstrating measurable impact, extending these capabilities beyond checkout into broader in-store experiences. Despite growing adoption, the market remains in the early stage of maturity. Only **23%** of retailers have fully scaled self-service solutions across their store fleets. However, momentum is building—**80%** of retailers plan to invest in or expand these technologies over the next 24 months.

This report examines the key challenges shaping today's in-store shopping environment, outlines the core self-service modalities supporting both customer experience and store operations, and provides strategic recommendations to help retailers maximize the value of these technologies.

Coresight Research Analysis

1. ***Retailers Are Building Broad, Innovative Self-Service Portfolios Across Their Store Networks.***

   Many retailers have assembled a portfolio of complementary solutions, to serve the full customer shopping journey. On average, adopters have 3.5 distinct self-service solution types to serve different shopper behaviors and store contexts.

2. ***Self-Service Technologies are Redefining the In-Store Customer Experience.***

   Prior to deploying self-service technologies, many retailers reported meaningful friction across product discovery, decision-making and checkout. Post-deployment, more than 50% reported that these challenges were addressed extremely effectively.

3. ***Self-Service Is Delivering Measurable Operational Gains Across the Store.***

   Retailers commonly face peak-hour throughput constraints, staffing pressure and limited inventory visibility. Self-service technologies increase transaction speed, reduces staffing needs and provides clearer inventory insight.

4. ***Retailers Are Planning to Expand Self-Service Technologies Across Their Stores After Seeing Early Payback.***

   Eighty percent of retailers plan to expand their self-service technology footprint within the next 24 months. 64% recovered initial investment within the first 24 months since deployment.

5. ***Scaling Self-Service Technologies Require Navigating Real Operational and Adoption Constraints.***

   Retailers cite infrastructure limitations, integration complexity, staff training and increased shrink rate as the most common barriers to scaling self-services. Retailers see integration with core retail systems highly important, including payment, POS systems, inventory, scanning, analytics and loss prevention.

Contents

Introduction

Friction is the enemy of retail—delays, inefficiencies and irritations that disrupt the shopper journey, drive abandoned purchases and erode customer lifetime value. It can occur at any stage, from product discovery and item collection to checkout.

Retailers can address these challenges through improved customer-facing interfaces, including enhanced associate support and enabling technologies that streamline the shopping experience. Digital touchpoints such as price checkers and point-of-sale (POS) customer interfaces are no longer purely transactional—they are evolving into platforms that shape engagement across the entire journey. Next-generation technologies, including self-service kiosks, mobile and handheld scan-and-go, and smart carts, are extending beyond transactions into broader in-store interactions. Early adopters are demonstrating measurable impact and scaling, underscoring the growing strategic impact of self-service technologies.

This report examines key sources of friction across the in-store experience and evaluates solutions that help retailers streamline operations, reduce customer friction and enhance satisfaction—ultimately driving sustained growth. It also highlights the factors that influence successful implementation and scaling.

Our analysis is based on a survey of 150 US retail executives conducted by Coresight Research between February 27 and March 9, 2026.

This report is produced and made available to nonsubscribers of Coresight Research in partnership with Zebra Technologies and Elo Touch Solutions. In 2025, Zebra Technologies acquired Elo Touch Solutions to expand Zebra's capabilities across both backend operations and frontend consumer interaction.

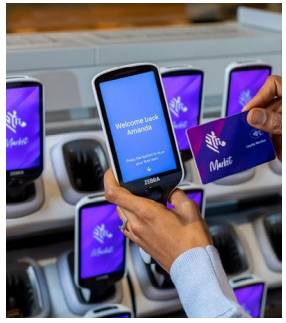
Research Scope

For the purpose of this research, “self-service technologies” refer to customer-facing, screen-based systems that allow shoppers to independently interact with the store to discover products, make decisions and complete transactions without relying on a cashier. These solutions encompass both hardware and software components. This report focuses on five categories that represent the most common and widely adopted in retail today.

- **Self-checkout terminals**—Fixed self-checkout stations with scanning and payment capability, enabling shoppers to complete transactions independently at a dedicated lane or kiosk.

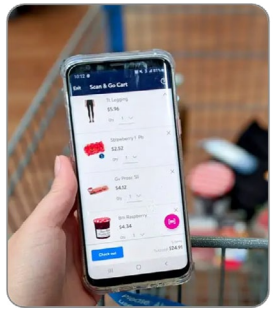
- **Self-service ordering kiosks**—Customer-facing ordering or configuration interfaces for products or services, enabling shoppers to customize and place orders without associate involvement.

- **Scan-and-go solutions using store-provided handheld scanners**—Store-issued handheld devices that enable shoppers to scan items as they move through the store and to build a basket prior to checkout.



- **Smart carts with integrated digital screens**—Shopping carts equipped with screens or sensors that recognize items as they are added, providing real-time basket visibility, pricing information and integrated checkout capability.

- **Scan-and-go solutions using personal smartphone apps**—Shopper-owned smartphones running retailer applications that support item scanning during the shop and digital self-checkout upon exit.



Coresight Research Analysis

1 Retailers Are Building Broad, Innovative Self-Service Portfolios Across Their Store Networks

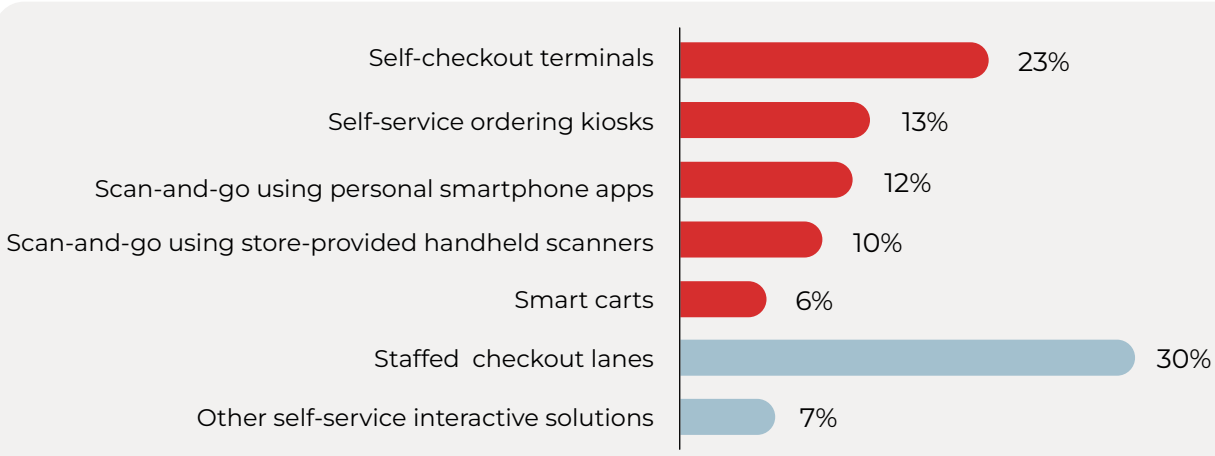
Retailers are increasingly moving beyond the checkout lane and deploying a broader range of self-service technologies across the store. According to the 2025 Bain & Company–Vusion survey of top-250 global retailers, **55%** have rolled out **self-checkout** at scale, **33%** have **scan-and-go** operational in at least part of their footprint, and **44%** are using **RFID** — signaling a clear shift toward more innovative self-service solutions beyond the traditional checkout lane.

Retailers embracing this shift are moving from deploying a single solution to building out a broader set of capabilities across their stores. These solutions are extending their impact beyond checkout and transforming the end-to-end shopping journey (Figure 2).

Among retail adopters in our study, self-service formats collectively account for a growing share of completed transactions (see Figure 1)—a milestone that reflects both consumer adoption and retailer commitment. Looking ahead, **80%** of respondents plan to **expand** their **self-service footprint** within the **next 24 months.** Expansion is expected to extend across more stores, more checkout lanes, and with a broader mix of formats.

Most retailers are assembling complementary self-service technology capabilities to serve different shopper behaviors and store contexts.

Figure 1.
Share of In-Store Transactions by Checkout Method Among Adopters



Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

These examples reflect leading adopters in our survey—retailers that have moved early and are actively scaling their self-service capabilities. In our survey, retail adopters operate an average of **3.5 distinct self-service solutions**, reflecting active diversification across their in-store technology stack:

- Self-checkout terminals remain the most widely adopted **(89%)**, while scan-and-go via smartphone apps **(77%)**, self-service ordering kiosks **(77%)**, and scan-and-go via handheld scanners **(67%)** are becoming increasingly common.
- Smart carts remain in earlier stages (41%) but are gaining momentum as retailers continue to test and expand new formats.

Industry Insights

Costco's CEO Ron Vachris stated in the company's third quarter 2025 earnings call that Costco is piloting scan-and-go type solutions, and early results show faster transactions, improved traffic flow and strong member adoption.

Sam's Club similarly highlighted in its 2025 Investment Community Meeting that it is investing in technologies such as scan-and-go and Just Go exit systems to deliver a more frictionless in-store experience.

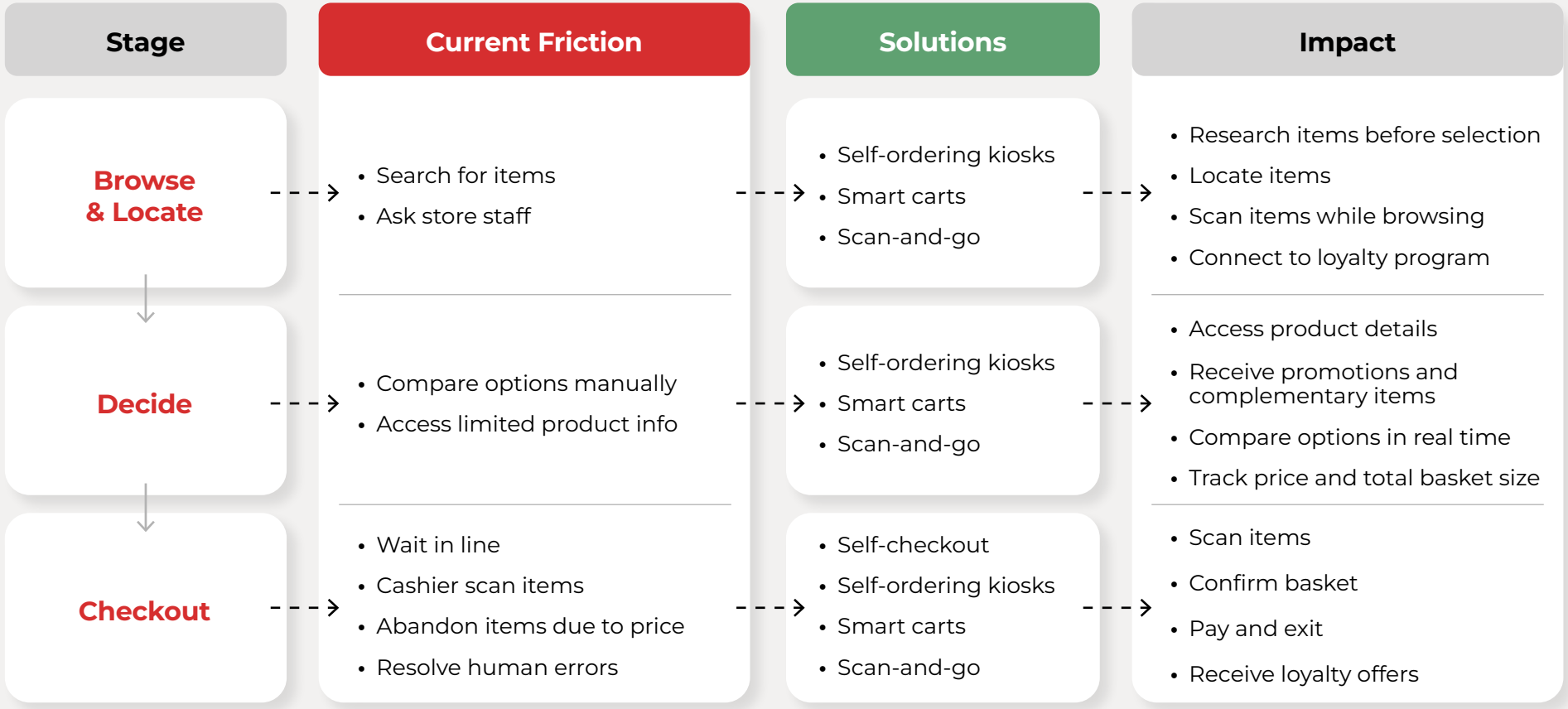
In 2026, **Whole Foods** and **Amazon** announced the expansion of its redesigned Dash Cart to dozens of Whole Foods Market locations across the U.S.

Ahold Delhaize deployed upgraded self-service deli kiosks across 600–700 stores, enabling customers to scan a loyalty card or phone number, place deli orders at store entry, and continue shopping while orders are prepared. The rollout improved throughput and customer experience while increasing basket size through integrated recommendations.

In 2025, **Target** announced that express Self-Checkout drove 10% faster transaction times, improved NPS and the company will continue to evolve checkout options for shoppers.

Below, we outline key sources of friction in both pre-checkout and checkout stages and highlight the impact of implementing self-service solutions to address these challenges.

Figure 2.
Self-Service Technologies Transform the End-to-End Shopping Journey



Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

2 Self-Service Technologies are Redefining the In-Store Customer Experience

Challenge: Pre-checkout Friction (Product Discovery and Purchase Decisions)

In-store product discovery, navigation and purchase decision-making remain highly dependent on physical store layouts, static signage and associate support. While these approaches can guide customers, they require ongoing effort and do not scale consistently across store environments. As a result, customers often face friction in locating products, navigating the store and accessing relevant information during the shopping journey.

- **Discovery:** More than 60% of retailers reported challenges across core discovery activities, including finding products (67%) and navigating the store (63%).
- **Product Decisions:** These challenges extend into the decision-making stage. More than 65% of retailers reported friction across key purchase-related steps, including accessing product information, comparing options, understanding pricing and building confidence to complete purchases.

Case Study
Connected Shopping Experience

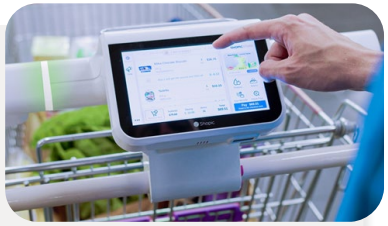
Tesco, a major UK grocery chain, enhanced its Scan as you Shop solution by integrating in-app shopping lists with handheld scanners. Customers can unlock devices using their Clubcards, track items in real time, view aisle locations and stock levels, and automatically tick off purchases.

Solution: Enable Interactive Engagement Across the Shopper Journey

Self-service technologies serve as the customer engagement layer of the modern in-store shopping journey. These solutions are enabling retailers to integrate digital capabilities across store navigation, product discovery and purchase decision-making.

Scan-and-go from Zebra
Source: Company website

Scan-and-go interfaces from **Elo** and smart carts from **Shopic** guide shoppers through in-store maps, aisle navigation and item search, while surfacing product information, pricing and personalized recommendations in real time. At the point of consideration, they provide richer content—such as specifications, reviews, comparisons, availability and complementary product suggestions—enabling faster, more informed purchase decisions.


Vision-powered Smart cart from Shopic
Source: Company website

In addition, the sensors, connectivity, and digital product interactions can capture shopper routes, dwell patterns and product interactions during the trip, helping retailers better understand in-store customer behavior and pain points.

Self-service ordering kiosks enable customers to browse product catalogs, explore options at their own pace, and configure items with preferred sizes, add-ons or customizations before reaching the checkout stage. Touchscreen interfaces can also surface, promotions, recommendations, and bundle offers to help customers make faster, more confident purchase decisions.


Self-ordering kiosks from Prestop
Source: Company website

Challenge: Checkout Friction (Speed, Convenience, Control)

Checkout remains a critical point of friction in the in-store journey, driven by long checkout queues, associate availability and basket visibility.

- **Speed:** Traditional checkout models have fixed front-of-store locations and create bottlenecks during peak periods. In our survey, more than two-thirds of retailers reported challenges with peak-hour checkout times (69%) and front-of-store congestion (67%).
- **Support:** These pressures are compounded by labor constraints and process inefficiencies. More than two-thirds of retailers reported insufficient staff to support checkout operations (67%).
- **Visibility:** At the same time, customers lack visibility into total spend prior to checkout. In our survey, 65% of retailers cited this as a challenge.

Self-service kiosks from Elo
Source: Company website

Solution: Shift Tasks Upstream and Streamline Checkout Journey

Retailers are increasingly leveraging multiple self-service solutions to expand transaction capacity and enable distributed checkout across the shopping journey. These solutions redistribute transactions beyond centralized checkout areas to improve throughput and reduce front-of-store congestion.

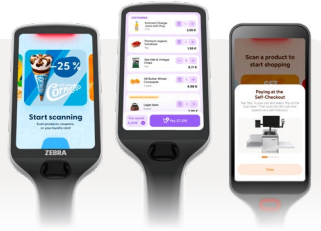
After deployment, **more than half (50%+)** of surveyed retailers reported that self-service technologies is highly effective in addressing these challenges and improving the overall checkout experience.

Self-checkout terminals such as those offered by **Diebold Nixdorf** allow customers to scan, bag and pay independently while increasing throughput and reducing queues. Other innovative self-checkout solutions are also emerging, such as the computer vision checkout systems offered by **Mashgin**, which allow customers to complete purchases with minimal or no barcode scanning.

Computer vision checkout systems offered from Mashgin
Source: Company website

Self-checkout terminals from Diebold
Source: Company website

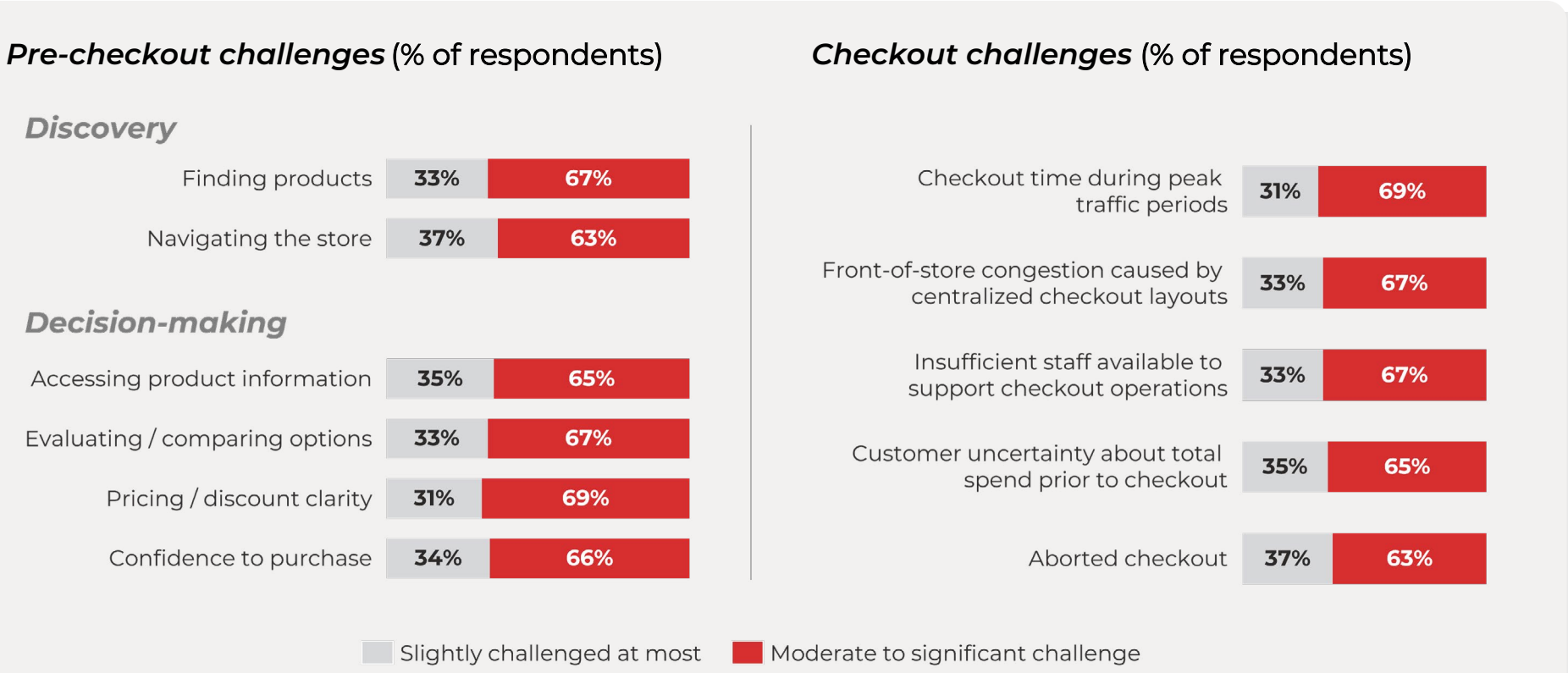
Scan-and-go solutions offered by software company **Shopreme** and supported by hardware companies such as **Zebra** and smart carts offered by **Instacart** can scan items, track basket totals in real time, and validate purchases through in-app or on-cart payment. By shifting item scanning and basket building earlier in the journey, these solutions reduce checkout friction.



Scan and go from Shopreme (software) and Zebra (hardware)
Source: Company website

Self-service kiosks such as those offered by **Elo** further extend this model by enabling customers to complete transactions including order placement and, in some cases, payment, which reduces the number of items and steps required at final checkout.

Figure 3.
Extent of In-Store Pre-Checkout and Checkout Challenges (% of Respondents)



Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

50%+

Reported self-service technologies are highly effective in resolving these challenges

3 Self-Service Is Delivering Measurable Operational Gains Across the Store

Challenge: Associate Availability

Front-of-store operations are constrained by fixed checkout models that limit transaction throughput and create inflexible labor structures. Traditional checkout processes concentrate transactions in staffed lanes, making it difficult for retailers to efficiently manage peak demand and scale capacity without adding labor. In our survey, retail stores require an average of **18 associates** dedicated to front-of-store functions.

This model limits how labor can be deployed across the store. Associates are tied to fixed positions at checkout and have limited flexibility to support other operational needs.

Solution: Unlock Associates for High-Value Tasks

Self-service technologies reduce reliance on fixed checkout lanes and enables stores to handle higher volumes more efficiently. In our survey, **70% of retailers** reported that solutions such as self-checkout and self-ordering kiosks increase peak-hour throughput. These gains translate directly into more flexible labor models.

After deployment, **83%** of retailers reported a reduction in front-of-store staffing requirements. An average of **four associates*** can be freed per store—equivalent to approximately **22%*** of front-of-store labor capacity. This represents an estimated **$184,000*** in annual labor value per store.

Rather than eliminating roles, retailers are reallocating associate capacity toward higher-value activities. As shown in Figure 4, associates are shifting from fixed checkout roles to more dynamic, customer- and operations-focused responsibilities.

Figure 4.
Front-of-Store Labor Reallocation by Categories (% Respondents; Multiple Selection)

Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

**Assumptions: Using midpoint estimates, staffing reductions average roughly 22% of front-of-store labor. With ~18 associates per store, this implies ~4 associates reallocated. At approximately $46K fully loaded cost per associate, this equates to roughly $184K in annual labor capacity per store. See Notes and Methodology for full assumptions and calculations.*

Challenge: Shelf Intelligence/Inventory Visibility

Retailers often have limited real-time visibility into in-store product movement and what's available on the shelf. Traditional inventory processes rely heavily on manual checks and periodic updates, which are time-consuming, labor-intensive and often lag behind actual in-store activity.

This lack of visibility constrains broader inventory and merchandising decisions. Without timely, granular data, retailers face challenges in maintaining shelf availability, optimizing replenishment and accurately forecasting demand at the store level. These limitations ultimately contribute to missed sales opportunities and operational inefficiencies.

Case Study
Inventory Intelligence

Decathlon deployed 458 RFID POS stations at self-checkout across 50 stores in Brazil. These POS systems capture item-level data and integrate with Decathlon's inventory management technologies to create a fully integrated environment. After deployment, Decathlon saw a 3% increase in inventory accuracy and a 38% increase in inventory counting productivity.

Solution: Convert Shopper Touchpoints into Inventory Signals

Solutions such as self-checkout by **Fujitsu**, self-ordering kiosks by **Aila**, scan-and-go by software company **Extenda Retail** and supported by hardware companies such as **Zebra**, and smart carts by **Veeve** turn customer touchpoints across the store into sources of item-level transaction data that can be integrated with inventory and store systems.

By extending data capture throughout the shopping journey, these technologies provide continuous visibility into how products are interacted with in-store:

- **Seventy-seven percent** of retailers reported improved out-of-stock detection following deployment, reflecting stronger visibility into shelf conditions and product availability.

More importantly, the downstream value extends beyond detecting empty shelves:

- Real-time transaction data enables faster restocking and less manual inventory checking
- Granular store-level demand improves forecasting and product allocation
- Self-service data enables analytics on in-store behavior (e.g., items picked up but not purchased)

Scan and go from Extenda Retail (software) and Zebra (hardware)
Source: Company website

Smart cart from Veeve
Source: Kroger

Self-checkout from Fujitsu
Source: Company website

Self-ordering kiosks from Aila
Source: Company website

4 Retailers Are Planning to Expand Self-Service Technologies Across Their Stores After Seeing Early Payback

Self-service technologies have moved beyond early evaluation. Returns are documented, the business case is established and organizations that invested early are shifting focus from initial deployment to optimization and broader rollout.

Following deployment, **55%** reported a moderate or significant increase in **average basket size**, driven by reduced friction across discovery, decision-making and checkout (see Figure 5). Frictionless shopping experiences can also strengthen loyalty: in a separate Coresight Research 2026 consumer survey, 41% of shoppers say these technologies improve the overall shopping experience, while 32% say they are more likely to shop with retailers that offer them.

The financial foundation supports continued expansion. **64% of retailers recovered their initial investment within 24 months, and nearly 95% within 36 months.** Returns are driven by a combination of labor reallocation, throughput gains and basket size growth as deployments mature.

Figure 5.
Estimated Annual Incremental Revenue per Store from Self-Service Technologies Driven Basket Size Increases (by Retail Format)

***Notes and assumptions: Weighted from survey responses (using midpoint assumptions), basket size uplift is estimated at roughly 11% among self-service users; applying roughly 64% self-service transaction share implies approximately 7% total store sales uplift. See Notes and Methodology for full assumptions and benchmarks.*

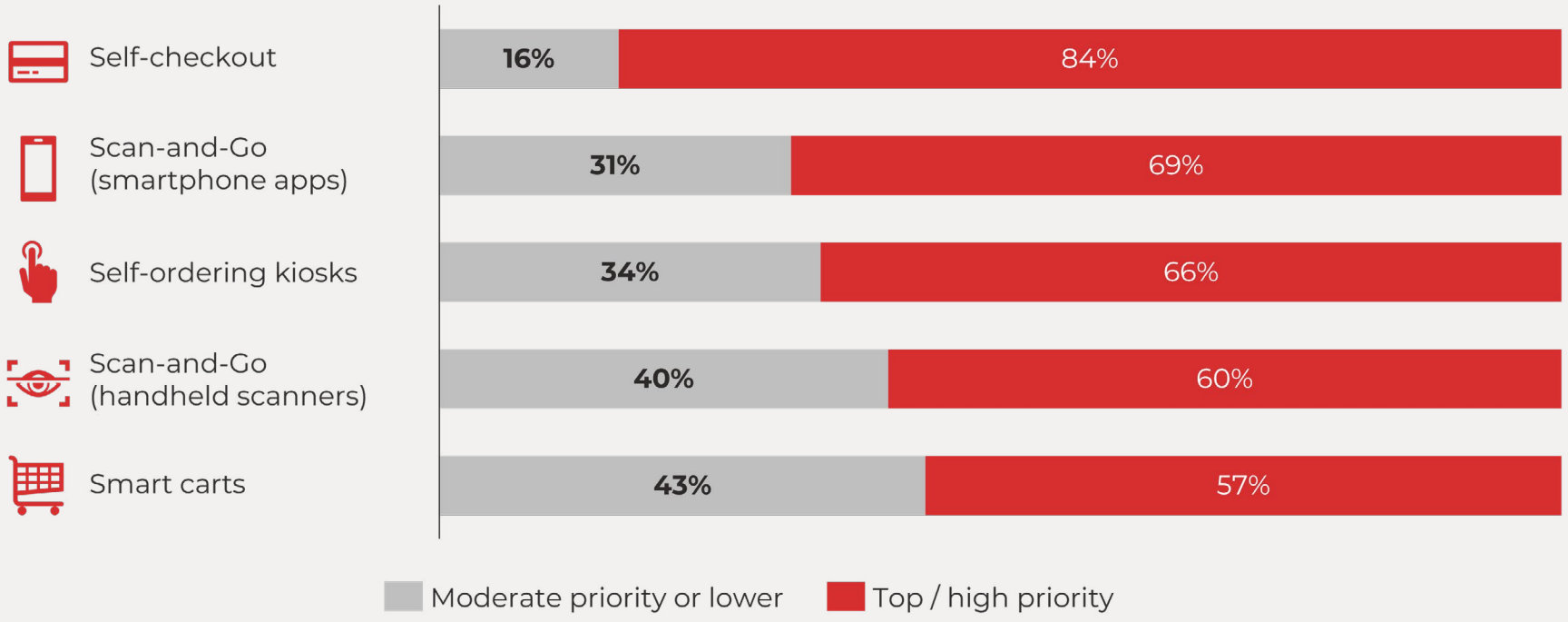
Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

64%
Achieved positive ROI within **24 months**

95%
Achieved positive ROI within **36 months**

As a result, 80% of retailers plan to expand their self-service technology footprint within the next 24 months. Investment priority reflects a diversified portfolio. (see Figure 6)

Figure 6.
Retailer Priority Levels for Self-Service Technologies (% Respondents)



Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

Self-checkout terminals remain the top priority and most established self-service technology format. At the same time, newer solutions are close behind, indicating growing interest beyond traditional checkout models.

5 Scaling Self-Service Technologies Require Navigating Real Operational and Adoption Constraints

Operational and Technical Constraints Remain Key Barriers to Scale

Scaling ambition is high, but retailers face operational and technical constraints that require active management. Figure 7 shows the most commonly cited barriers and what would most accelerate expansion.

Taken together, these responses reflect a market committed to scaling but want greater confidence in the performance of its deployments.

Figure 7.
Share of Respondents Reporting Key Operational Constraints Observed when Deploying Self-Service Technologies

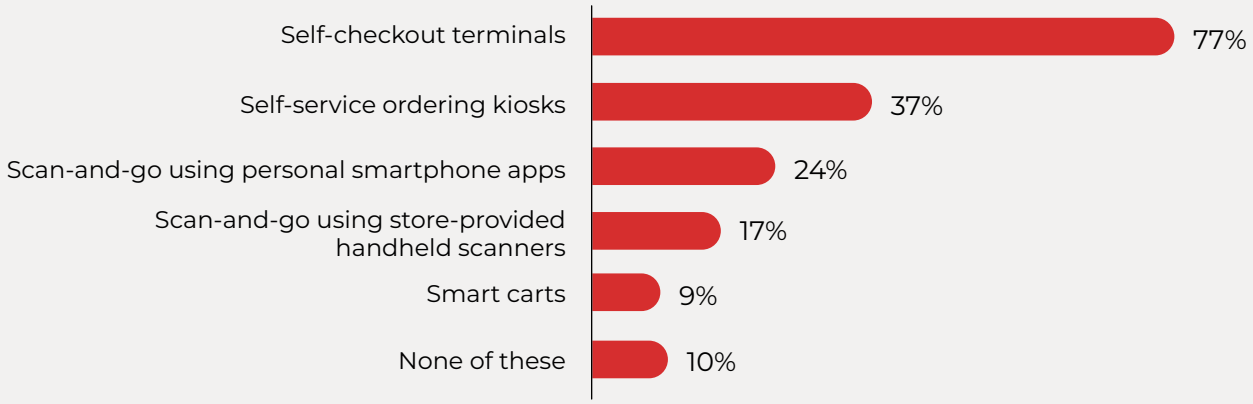
Deployment Challenges		Expansion Drivers	
Increased shrink following self-service technology deployment	49%	Clearer ROI and cost savings documentation	49%
Infrastructure limitations around network and hardware	37%	Improved customer experience metrics	49%
Integration complexity	35%	Reliability and uptime improvements	45%
Staff training and change management	35%	Stronger loss prevention performance	41%

Base: 150 US retail executives (Director+), final or shared decision-makers for in-store technology.
Source: Coresight Research

Consumer Adoption and Engagement Remain Critical to Realizing Value

While retailers continue to expand self-service capabilities, consumer usage remains uneven across solutions. In our study, adoption varies significantly by technologies. More familiar formats such as self-checkout terminals and self-ordering kiosks see higher usage while newer solutions remain underpenetrated (see Figure 8).

Figure 8.
Self-Service Technology Solutions Surveyed Shoppers Have Used in a Physical Store

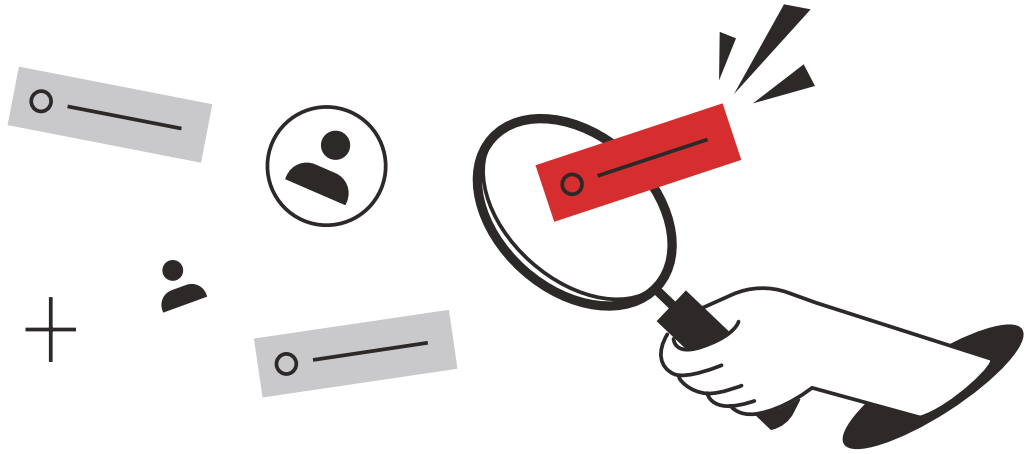


Source: Coresight Research March 2026 Consumer Survey

Self-checkout terminals dominate current usage due to their scale and familiarity, but adoption of newer solutions remains limited.

This gap highlights a clear opportunity for retailers to accelerate consumer adoption of more advanced self-service technologies.

The results indicate that a meaningful share of consumers have limited exposure to newer formats. Driving adoption requires more than technology deployment—retailers need to simplify onboarding, make solutions more visible in-store, and actively encourage first-time use.



Extensible, Integration-Ready Systems Enable Greater Value as Store Strategies Evolve

As the market matures, solution providers are becoming more strategic, moving beyond point solutions to integrated platforms. Devices such as kiosks, handhelds and interactive screens are no longer just customer-facing tools—they are becoming core digital infrastructure, connecting payments, loyalty, pricing, inventory and service workflows in real time.

Retailers best positioned for long-term value build on platforms open for integration—adding capabilities, connecting systems and adapting to new strategies over time without significant reimplementation costs.

Transforming self-service capabilities from a technology purchase into a strategic asset requires deep integration with the broader retail technology stack, which includes breaking down siloes, enabling connections across systems and maintaining an extensible architecture that allows new capabilities to be added as needs evolve. In our study, more than **55% of retailers rated integration as extremely important across all major systems.** Retailers rank payments (69%), barcode scanning (63%), inventory management (61%), promotions and pricing (59%), and loss prevention (59%) as the most critical systems to integrate with self-service technologies.

Figure 9.
Think Beyond Checkout: Self-Service as a Unified Platform
The real value of self-service comes from what it enables across the store

Leading providers such as **Elo, Diebold Nixdorf, Zebra, and Fujitsu** are enabling this shift through open hardware, modular software and broad compatibility with retail systems. In practice, the integration plays out across a few key areas:

Loyalty, CRM and Retail Media

Self-service screen displays (e.g., mobile apps, handheld devices, smart carts, self-ordering kiosks) create a new in-store media channel. Retailers can deliver targeted promotions, product recommendations and coupons in real time during the shopping journey. This allows retailers to influence decisions at the point of consideration.

Workforce Management

Integrating transaction volume data into staffing systems allows stores to make smarter, faster decisions about associates capacity during peak periods, moving from fixed schedules to demand-driven labor allocation.

Performance Analytics

Beyond basic payment processing, integration with mobile wallets and buy-now-pay-later options gives shoppers more flexibility at checkout and reduces abandonment due to payment friction.

Payments

Beyond basic payment processing, integration with mobile wallets and buy-now-pay-later options gives shoppers more flexibility at checkout and reduces abandonment due to payment friction.

Inventory Management with RFID

Every scan becomes a live inventory update and enables automated replenishment before shelves go empty.

What We Think

Self-service technologies have crossed a meaningful threshold. What began as a checkout efficiency tool is evolving into a broader in-store layer that supports discovery, product evaluation, ordering and payment across the in-store shopping journey. As retailer adoption and shopper familiarity grows, self-service will become a standard component of the modern stores. Retailers that move deliberately now to build the integration foundation will be better positioned to scale efficiently, capture new efficiencies and absorb emerging capabilities without the cost and disruption of rebuilding from scratch.

Future stores will look different as a result. As adoption grows, retailers will place greater emphasis on integrating self-service capabilities across the shopping journey. The associate role will continue to evolve and shift toward targeted customer support that complements self-service capabilities. In the store of the future, customers move fluidly between self-service and human assistance depending on their needs in the moment.

Implications for Retailers

- **Treat self-service technologies as a platform.** Build solutions on extensible architectures that allow integrations of new capabilities—loyalty, RFID, AI-powered loss prevention and analytics as strategy and technology evolve. Vendor selection should therefore focus on platform flexibility and integration openness, choosing systems that can easily connect with external technologies and complementary modules.
- **Rethink store layout and labor deployment in parallel with technology investment.** Self-service technology changes how stores operate and how space is used. Retailers that redesign layouts and associate roles alongside their technology deployments will realize gains faster.
- **Build the measurement infrastructure to demonstrate ROI at the store level.** Clear ROI is the key driver of expansion. Connecting deployment metrics to financial outcomes helps retailers to monitor solution performance, track financial return, and scale with confidence.
- **Prioritize integrating loss prevention as a first-order requirement.** Shrink is the most widely cited operational challenge following rollout. Retailers that build loss prevention into their self-service technology setup from the start will be better positioned to scale effectively.
- **Actively drive customer adoption.** Deployment alone does not guarantee usage. Retailers need to lower barriers of adoption by making self-service solutions easy to find, easy to use. Those that successfully convert more shoppers into returning users will see stronger solution utilization and faster payback on their investment.

Notes and Methodology

Data in this report are based on an online survey conducted by Coresight Research between February 27 and March 9, 2026, covering US-based retail executives. Results have a theoretical maximum margin of error of ±8% for the full sample (N=150) and ±14% for each vertical subsample (N=50) at a 95% confidence level.

Respondents met the following screening criteria:

- Company scope: Executives from US-based retail organizations with active physical store operations
- Technology familiarity: Respondents reporting being either extremely familiar or highly familiar with self-service technologies
- Decision-making authority: Respondents serving as final or shared decision-makers for in-store technology deployment decisions

Respondent profile:

- Seniority: Senior leadership roles, including C-suite executives, division leaders and director-level positions and above
- Functional responsibilities: Involvement in store operations, store technology/IT/digital and finance functions

Visit our methodology page to read more context for understanding the results of Coresight Research surveys.

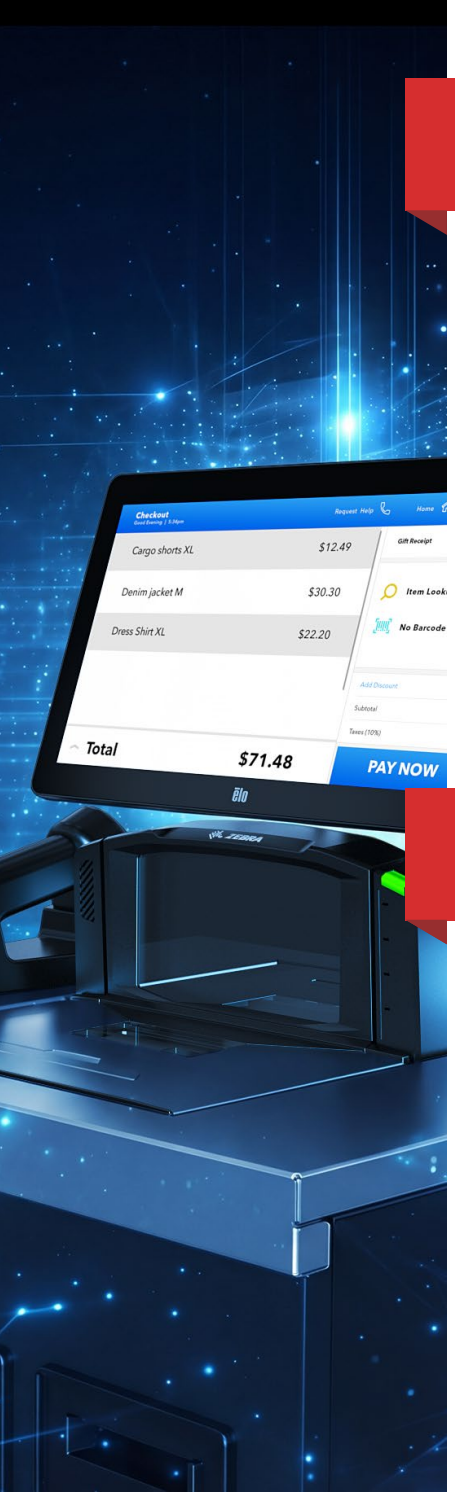
Notes and Methodology

***Page 12 Assumptions:**
Estimated staffing impact based on midpoint values for each survey range. Significant, moderate, and slight reductions were approximated at 60%, 30%, and 10%, respectively, and weighted by respondent distribution to estimate an average ~22% reduction in front-of-store staffing. Baseline staffing levels were estimated using midpoints of reported associate ranges, yielding an average of ~18 associates per store, implying ~4 associates reallocated per store after self-service technology deployment. Labor cost estimates assume the BLS mean annual wage for retail salespersons (~$36.7K) plus 25% overhead ($46K fully loaded), suggesting ~$184K of labor capacity per store annually.

****Page 14 Figure 5 Assumptions:**
Survey responses on basket size changes (16% reporting >20% increase, 39% reporting 10–20%, 26% reporting 1–10%, 18% reporting no change and 1% reporting a decrease) are translated into a weighted average using midpoint assumptions (25%, 15%, 5%, 0% and –5%, respectively), yielding an estimated approximately 11% uplift among self-service users. Adjusting for transaction mix, based on approximately 64% of in-store transactions occurring via self-service channels, implies an aggregate revenue uplift of approximately 7% of total store sales. Incremental revenue per store is therefore modeled as proportional to baseline store productivity. Applying this framework to typical annual sales ranges by format—grocery ($18 million–$45 million), department stores ($13 million–$32 million) and mass merchants/warehouse clubs/home improvement ($50 million–$70 million)—yields indicative incremental revenue of approximately $1.3 million–$3.1 million, $1.0 million–$2.3 million and $3.5 million–$5.0 million, respectively.

Annual sales ranges are benchmarked using publicly disclosed revenue and store count data from representative retailers, including Kroger and Publix (grocery); Kohl's and Macy's (department stores); and Target and Home Depot (mass merchant and home improvement), based on the latest available annual reports and investor disclosures.

For large-format retailers, ranges reflect typical store productivity and exclude extreme high-volume outliers (for example, warehouse club formats such as Costco), which can significantly exceed these levels. Estimates are directional and subject to variation based on format, execution and customer mix.



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Jiayue Zhao
Strategy Consultant

Steven Winnick
Vice President - Innovator Services

New York · Hong Kong · Lagos · London · Mangaluru (India) · Shanghai

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Elo Touch Solutions is a global provider of touchscreen displays, self-service kiosks and interactive POS systems used across retail, hospitality and healthcare environments. Its solutions are widely deployed for self-checkout, ordering kiosks and customer engagement interfaces, enabling businesses to enhance in-store experiences and automate transactions. In August 2025, Zebra Technologies announced a $1.3 billion acquisition of Elo, completing the deal in October 2025 to expand into customer-facing digital touchpoints. The combination allows Zebra to offer a more comprehensive, end-to-end platform spanning both backend operations and frontend consumer interaction, strengthening its position in self-service and POS ecosystems.

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