

Completely revised and updated

The only comprehensive analysis of off-site ATMs.

An invaluable source of strategic information for all organisations involved in or looking to enter this fast-growing sector.

# Off-site ATMs Europe

“Outstanding professional experience in the area of banking and payment systems”

*The European Commission*



RETAIL BANKING RESEARCH

# Off-site ATMs Europe

This comprehensive analysis of off-site ATMs is a vital source of strategic information.

Off-site ATMs are driving overall ATM growth in Western Europe. Deployers and suppliers need to keep abreast of market trends in order to provide their customers with the most competitive service.

In response to the demand for information on this increasingly important sector, RBR has published Off Site ATMs Europe. For each country, this report answers key questions such as:

- How developed is the off-site sector?
- Who are the leading buyers and suppliers?
- Are there opportunities for new entrants?
- What are the attitudes towards surcharging and third-party advertising?
- Can non-banks join local networks?
- Which retailers are hosting or deploying ATMs?

The report is a valuable source for companies developing market strategies, planning new products, and deciding whether and how to exploit the opportunities that the off-site ATM market affords.

Off-site ATMs Europe is carefully structured to allow comparison between countries. Companies can evaluate their own off-site ATM strategy and benchmark performance against competitors.

The report offers in-depth information on 18 countries and comprises 500 pages and over 250 tables and graphs. Commentaries highlight key issues in each market.

## Methodology

RBR contacted off-site ATM owners, operators and networks in each country as part of a comprehensive survey carried out in Europe.

**The information in Off-site ATMs Europe is not available from any other source.**

## The basis for practical decision making

The report is an invaluable tool and data resource for planning new products, improving existing services, developing market strategies, and deciding whether, or how to, enter new markets.

### ATM manufacturers

will understand the latest requirements of the sector

### Deployers – banks and networks

can benchmark the development of other deployers and networks

### Independent ATM Deployers (IADs/ISOs)

get a vital tool for assessing entry or approach to different markets

### Security companies

can identify the extra opportunities this sector presents

### Advertisers

will be able to assess the commercial potential of the sector

### Retailers

will understand the benefits and issues of hosting ATMs

### Consultants and analysts

will obtain data and insight for their own proprietary analyses

## Outline of the report

The report is organised into 2 parts:

### Part One: International Overview

The extensive international overview compares in detail the development of each of the countries. Graphs and tables highlight the key features of each market, such as: levels of deployment, usage, location and manufacturer market shares.

### Part Two: National Analyses

The full report comprises 18 individual national sections:

- Austria • Belgium • Denmark • Finland • France • Germany • Greece • Ireland
- Italy • Luxembourg • Netherlands • Norway • Portugal • Spain • Switzerland
- Turkey • Sweden • United Kingdom

Each national analysis covers:

- Off-site ATM market size and growth
- Profiles of leading off-site ATM deployers
- Deployer market shares
- Locations and site-owners
- Manufacturer market shares
- Transaction volumes and values
- Network access (banks and non-banks)
- Fees including surcharging
- Potential for third-party advertising
- Future outlook and forecasts

## About RBR

RBR is recognised as a leading strategic research and consulting firm with over two decades of experience in retail banking, banking automation and payment systems.

**Our Research** is independent and specialised, leveraging an extensive network of experts around the world. We publish detailed, industry-leading, strategic market research reports.

**Our Consulting** is facts-based and analytically rigorous, something that clearly differentiates us from other firms. RBR supports its clients with information, analysis and advice that allows them to make better, more informed, decisions.

Recent client engagements include:

### Conducting Strategic Reviews

- Reviewed and developed self-service strategy for international equipment manufacturer
- Assessed impact of Japanese government reform on leading IT vendor

### Assessing International Market Opportunities and Entry Strategies

- Developed market entry strategy for independent ATM deployer
- Established European potential of ATM outsourcing for international manufacturer

### Evaluating Business Cases for New Products and Services

- Researched specification and business case for new ATM module for European equipment supplier
- Analysed the business case and potential market for third party ATM advertising

### Forecasting Demand for Products and Services

- Evaluated potential for independent self-service deployment in multiple countries for new entrant
- Analysed current and likely future demand for teller assist equipment for international equipment supplier

## BABE Banking Automation Newsletter

Our subscription newsletter, Banking Automation Bulletin for Europe (BABE) is published 10 times per year.

BABE presents objective analysis and insight by experienced consultants on developments in banking and payment automation worldwide.

