



Navigating the Shift to Self-Service in Asia



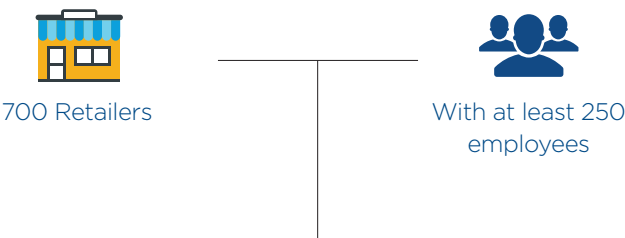
Navigating the Shift to Self-Service

In the face of persistent market volatility and increased competition, retailers throughout the Asia Pacific region are progressively adopting customer self-service technologies, a trend we have been seeing since the pandemic.

In 2022, Diebold Nixdorf, recognizing the need for an in-depth understanding of this trend, commissioned IDC to conduct a survey involving 700 retailers with at least 250 employees, spread across seven key markets: Singapore, Malaysia, Thailand, Philippines, Vietnam, Hong Kong, and Indonesia. The focus of the survey was to analyze the adoption and impact of self-service systems within these diverse retail environments.

Driven by enduring shifts in consumer habits due to the pandemic, retailers across the region cited operational efficiencies, enhanced customer interactions, and more effective cost management as top priorities.

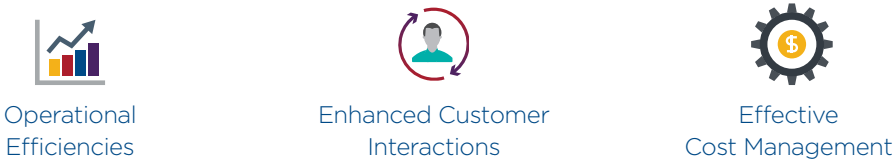
We Surveyed:



Spread Across These Key Markets:



Cited These Three Top Priorities:



Key Research Findings¹

- **Market on the Move:** According to the study conducted by IDC, while only 16% of surveyed retailers had fully implemented self-service, a significant portion (46%) were interested or planning to adopt it within 24 months. This signals a rapid shift towards a self-service-centric future for Asian retail. However, the pace of adoption varies by country.
- **Developed vs. Developing Markets:** The study also pointed out that developed markets like Singapore and Hong Kong were seeing faster and more widespread adoption due to existing infrastructure and tech-savvy consumers. Today, Diebold Nixdorf is helping our retail customers focus on optimizing the customer journey through self-service kiosks with advanced features like loyalty program integration and personalized product recommendations.
- **Emerging Leaders:** Developing markets like Vietnam and Indonesia, while having lower current adoption rates, are ripe with growth opportunities, as cited by the IDC research. Retailers in these markets can leverage self-service to address challenges like staff shortages and cater to a growing, digital-native population. Here, a focus on user-friendly interfaces and educational campaigns will be crucial for fostering customer acceptance.

“ As wellness remains a priority today, the ongoing need to minimize human contact is propelling retailers towards technologies that provide **seamless, frictionless customer interactions**. This strategic pivot is timely, given the gradual relaxation of safety measures and the resurgence of in-store shopping, which demands not only enhanced customer experiences but also greater operational flexibility and efficiency at the frontend. ”

¹ Source: IDC InfoBrief, sponsored by Diebold Nixdorf, Asia Retail's Journey Toward Self-Service, July 2022, IDC Doc#AP241289IB

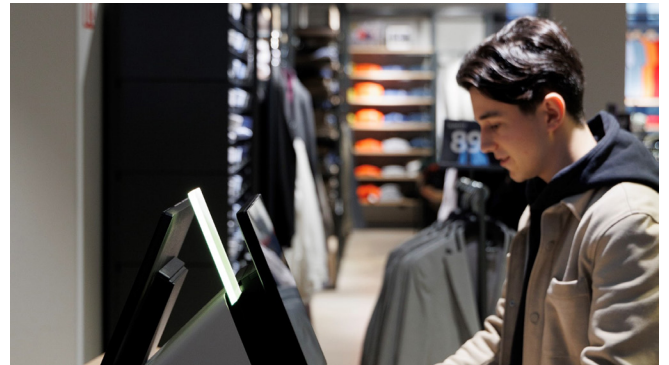


Retail Frontend Transformation with Self-Service Solutions

Regardless of market maturity, a seamless customer experience remains paramount. Self-service solutions, when implemented thoughtfully, can:

Empower Customers: From Passive Consumers to Active Participants

Self-service solutions can transform the customer experience by empowering them to be active participants. Interactive kiosks and signage provide information and reviews for informed decisions, while product displays allow exploration and personalization. It offers the freedom to move through the store at their own pace, eliminating queues and fostering a sense of control and ownership over the shopping journey.



Redefining Staff Roles: From Transactional to Transformational

Self-service frees staff from routine tasks, transforming them into customer experience specialists. Enhanced training equips them with the skills to navigate new technologies and excel in service. This shift allows staff to focus on personalized recommendations, assisting with complex purchases, and building genuine connections with customers, ultimately creating a more positive and memorable shopping experience.

Seamless Journeys: Orchestrating a Unified Experience

By leveraging customer data, self-service solutions can personalize product recommendations, promotions, and loyalty programs, creating a more relevant experience. Additionally, integrating digital wayfinding tools within the store allows for effortless product location, reducing frustration and ensuring a seamless journey for customers.



Embracing the Future: Optimizing Self-Service Implementations for Retail Growth in Asia Pacific

The IDC findings illustrate a critical juncture for retailers in the Asia Pacific region as they navigate the complexities of integrating self-service technologies into their operations. With the landscape evolving rapidly, those who effectively address the dual goals of enhancing customer experience and operational efficiency are likely to thrive. Retailers must overcome initial challenges, such as customer education, and adapt to these innovative systems to realize potential gains in efficiency and customer satisfaction. As the market continues to develop, strategic investments in self-service technologies will be key to maintaining competitiveness and achieving sustainable growth.

Diebold Nixdorf: Your Partner in Self-Service Success

Retailers need an adequate response to the continuous innovation in consumer and staff journeys. At Diebold Nixdorf, we have introduced Storevolution™, an overarching approach and program designed to help retailers adapt to constant change, with a focus on optimizing consumer experiences while lowering overall costs. As such, Storevolution supports retailers in designing, enabling, and operating relevant consumer and staff journeys on a daily basis. Self-service plays an important role in many of these journeys and has been accepted and adopted by many consumers around the globe. Diebold Nixdorf is devoted to self-service solutions that deliver the right solution mix for our customers identified by our Storevolution Advisory Services team. Our solutions were designed with the most scalable and modular platform currently available in the retail industry, enabling us to leverage our expertise and patented technology in self-service from a (managed) services, software, and hardware perspective. As one of the leading companies in the retail market we see the need to do MORE for our customers and believe that we are just at the beginning of the self-service era seamlessly combined with integrated customer journeys.

Learn more at www.dieboldnixdorf.com/retailservice