



Checking In at the Check Out

Technology, Loyalty and Opportunity in Supermarkets

SCALA 

WHITE PAPER



As shopping behaviours have been modified by the global pandemic, there is a huge opportunity for grocers to employ integrated technological solutions to attract shoppers, deepen customer understanding, forge customer loyalty and future-proof operations in the face of changes to the marketplace. This white paper has collated Europe-wide data from the last two years, extracting the trends likely to impact grocers. The paper then goes on to explore what creative integrated digital solutions can offer to supermarket brands in order to stay competitive, relevant and convenient to customers.

Topics

- How Online Orders will Inform In-Store Strategy
- Assuring Shoppers of Store Safety
- Supporting Shoppers as they Support Local Suppliers
- Integrating Personal Devices with In-Store Signage
- How Dynamic Digital Solutions can Keep Brands Competitive

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Disruption, Data and Decisions

2020 was a monumentally disruptive year for retail. Impacted by government restrictions, changes in typical customer activity and shopper spending, some categories and brands suffered while others thrived. Stores supplying food and household items, protected in many territories by their “essential” status, saw a 2020 that broke all records with many grocery brands exercising and extending new fulfillment and distribution technologies to better serve their customers.

As lockdowns were introduced and stockpiling resulted in shortages on the supermarket shelves, individuals changed how they shopped holistically — how often they shopped for groceries, the method that they used to shop, the retail brands that they visited, the quantity of groceries that they bought and the categories purchased.

Much has been written about the impact of the global pandemic on retail with a wealth of data available to those keen to track the changes across customer activity and attitudes. This white paper highlights the key consumer trends identified across Europe and what the implications of these trends means for the grocery sector. Taking the data and highlighted trends, this paper then looks at the ways in which technology could serve the newly-established and emerging needs of supermarket shoppers.



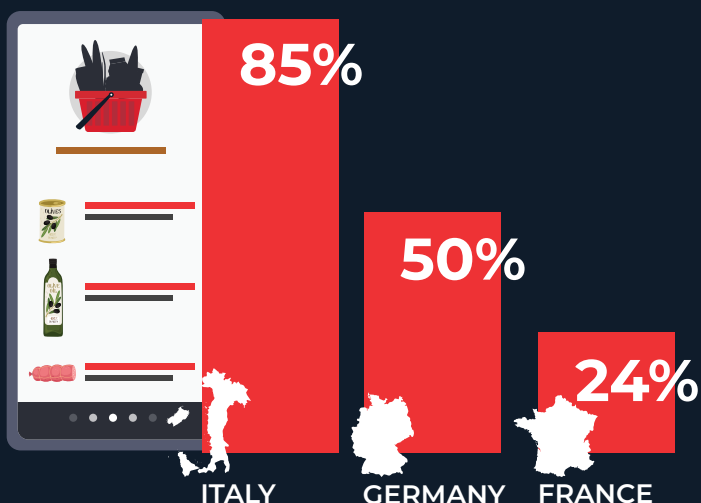
Online Orders and In-Store Strategy

As shoppers looked to minimise their trips outside the home in 2020, home delivery was tried by many households who would normally purchase their groceries in the supermarket. As we'll see below, the data suggests that although customers trying grocery delivery greatly increased last year there is still a strong appetite to purchase groceries in store. Indeed, the instances of individuals shopping exclusively online for groceries is extremely rare and data from 2021 shows that the rate of growth in online grocery shopping is slowing down as more shoppers are returning to the supermarkets.

The opportunity for retailers is to offer a seamless experience for all shoppers regardless of the way they purchase items. By offering an omnichannel experience and making the most of the data provided by brand touchpoints, whether they be online, in-app, or in store, grocers can optimise sales and deepen customer loyalty.

Online grocery shopping, already fairly well established in some EU territories such as the UK, rose to prominence with Italy experiencing demand for online groceries more than doubling in April 2020.¹ In France, online food sales at retail giant Carrefour leaped 70% in Q1 2020, compared with H1 2019.² 45% of the total UK adult population have done a weekly grocery shop online since the nation's initial lockdown in March 2020, meaning that 2.7 million more households had been converted to shop online at least once a week since lockdown.³ In the rest of Europe, online shopping for groceries also became a more regular occurrence as illustrated in the graphs.

Digital Grocery Sales

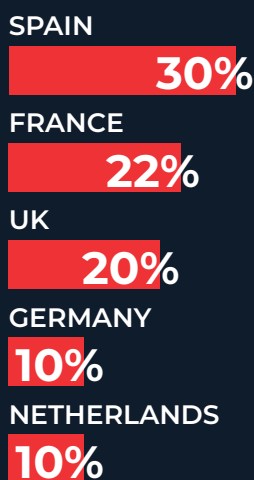
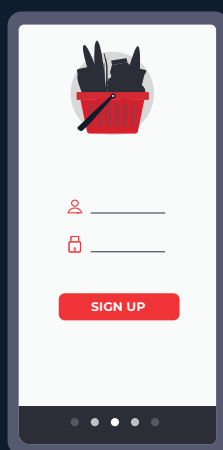


In Italy, digital grocery sales were 85% higher in 2020 than in 2019.⁴

In Germany, online grocery sales nearly doubled between Q2 2019 and Q2 2020, to €772 million (\$864 million).

In France, 24% of adults polled in June 2020 said they would do more digital grocery shopping post-pandemic.

A comparable poll in Germany found lower but still notable shares of adults intending to do more digital grocery shopping (15%).⁵



In Spain 30% of surveyed shoppers purchased groceries for the first time digitally, 22% in France, 20% in the UK and 10% of shoppers in Germany and the Netherlands.⁶

Loyalty

The increase in online grocery sales was partially driven by households who had never purchased groceries online before. Online sales have had an impact on brand loyalty. In the last year, likely due to a desire to avoid Covid-19 infection, an estimated 15% of surveyed EU-5 (France, Germany, Italy, Spain, UK) consumers have shopped for groceries on a website that they had never used before. Among these shoppers, more than half said that they intend to continue shopping at their newfound site for at least some of their grocery needs. 12% had also used different grocery stores to take advantage of home delivery or click and collect availability.⁷ There is a huge opportunity for these newly-engaged brands to build loyalty with their new customers and bring them into stores. Delivery is an important option for brands but attention to delivery should not eclipse the in-store offering. Online shopping for groceries is set to be part of the shopping mix for many shoppers, but **data shows** that it is very unlikely to be the exclusive way that people choose to purchase their essential items.

Dissatisfaction

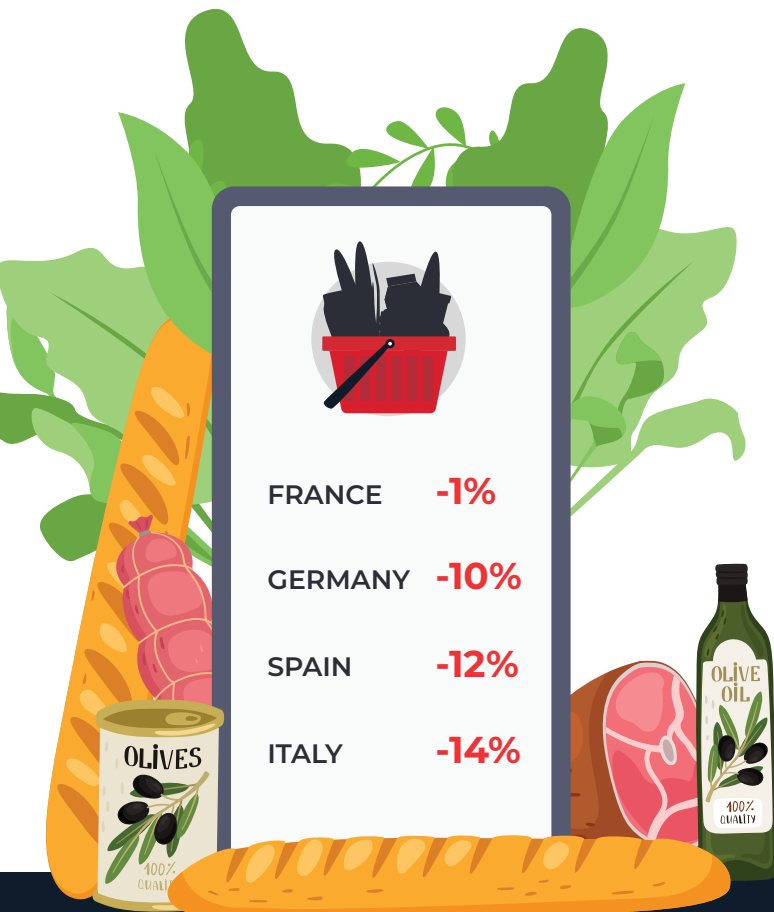
Not everyone who tried online was happy with their experience. In the UK, data suggests that 5% of home delivery users are strongly dissatisfied with their experience and only 33% very satisfied⁸, although it seems that 75% of Gen Z and 63% of millennials voice dissatisfaction at not being able to get desired items delivered.⁹ Data from September 2020 suggests that across EU-5 consumers, it is only UK consumers who expect to increase their online grocery shopping with a net intent of +5%. Consumers in other EU markets expect to reduce their online grocery shopping, with net intent of -1% reported in France, -10 % in Germany, -12 % in Spain, and -14 % in Italy. However, even in these markets online sales were still higher in September 2020 than they were before the pandemic.¹⁰

This data shows that shoppers were willing to try online shopping, but that there are aspects of the in-store experience such as choosing particular fresh produce, discovering new products in the aisles and grabbing end of day bargains, that cannot be delivered online.

Indeed, the from Kantar shows that as UK retail opens and vaccination numbers increase, grocery online sales growth has decreased and has halved since the height of the pandemic to 46%.¹¹

There are also key customer groups for whom online grocery shopping will not appeal or who may not be appropriate. Having groceries delivered often requires a minimum spend or a delivery fee which may be prohibitive for some and, as already mentioned, delivery slots can be difficult to obtain.

Online grocery shopping is rarely the exclusive way that households shop. When the methods that were used pre-pandemic and the methods utilised over the last year are compared, 95% of UK shoppers who have experienced digital shopping also bought groceries in store in 2019. In 2020 this figure only decreased 7%, down to 87%. This shows that shoppers were still visiting stores for their groceries, and the opportunity for grocers lies in offering a convenient experience for those utilising different methods and to deepen connections with those customers.



EU markets expect to reduce their online grocery shopping

Online and In-Store Opportunity

There is a great opportunity for grocers to embrace these new grocery shopping behaviours and preferences. Grocers can leverage data and insights from both online and in-store shopping to make the in-store customer experience as satisfying and relevant as possible.

Through sensor systems, behaviours can be tracked and in-store screens made more compelling. There's also an opportunity for location-based marketing to promote specific or complementary items that are likely to be apt to the current in-store clientele. For example, an online order that includes new-born sized nappies and baby wipes could then prompt marketing messages online, via an app or in store that correlate to baby and childcare as the baby grows. Or, if a shopper appears to be a fan of New World reds, they could be alerted to a new malbec and maybe, when they are in store, be shown food that would pair well with their favourite tipple. Data analysis and perceptive AI would determine proactive, relevant recommendations that are valuable to customers and drive loyalty for the supermarket brand.



Using in-store sensors and cameras to track footfall and dwell times across the physical store as well as the attention paid to digital signage can be used to test and refine new marketing messages. In store- digital signage and sensors can also be used to inform promotions. Using shelf-edge signage, shoppers could access vouchers to be used in store or online. With appropriate permissions granted or downloading a loyalty app, customer movements can prompt personalised offers delivered directly to their device or deliver location-based marketing and cue messages on nearby digital displays. Anonymous footfall and pathing data can help supermarkets make better informed, valuable decisions on product placement and navigation for products available online as well as in store.

A More Convenient Click and Collect

Digital signage can create a more personalised and convenient click and collect experience for shoppers. Grocers are already looking at how to make the fulfillment of online orders more efficient with some brands such as UK grocers Ocado and Sainsburys able to offer in-hour

delivery to some shoppers and Waitrose teaming up with delivery service Deliveroo.

Making click and collect a smoother and easier experience for shoppers is also an area of investment focus. Speed of fulfillment is a consideration as is the convenience for shoppers. By utilising a Scala solution such as parking lot activation, the supermarket car park becomes a key asset for a store brand.

Using a fully integrated system, a shopper can order groceries online or via the store app and choose a time that is convenient for pick up. As they approach their selected store at their selected time, the store app could welcome them to the store and direct them to a reserved parking space. This welcome and direction messaging could also be displayed on digital signage on site, or the digital signage could instead display promotional offers that may be of interest to the shopper who is recognised via their store app or perhaps their license plate. Once the shopper has found their assigned parking space, the shopper could check in with their personal device either at an automated terminal or by a member of the store team and, once verified, have their shopping loaded directly into the car.

During pick up there could also be an opportunity to buy additional items and resolve any substitutions (a regular headache for those who order groceries online) with the full range of products in store. A satisfaction survey can determine the effectiveness of the parking lot activation so that the service can be tweaked to better serve customers and drive loyalty.

The increase in online delivery has seen grocers to invest in their ability to satisfy orders rapidly and with minimum wastage. J Sainsbury recently announced the closure of its London online fulfilment centre with plans to redeploy most of the 650 employees to area supermarkets. Ocado is also shifting to smaller supply bases in order to ensure that its delivery proposition remains competitive.

Efficiency will be key in these fulfillment centres with integrated technology playing a key role in creating largely automated fulfillment processes. Digital signage integrated with sensors and combined with staff devices such as small tablets will all be essential in monitoring efficiency, ensuring order accuracy, minimising waste and offering a competitive, rapid and reliable service to the customer.



Safety and Space in the Supermarket

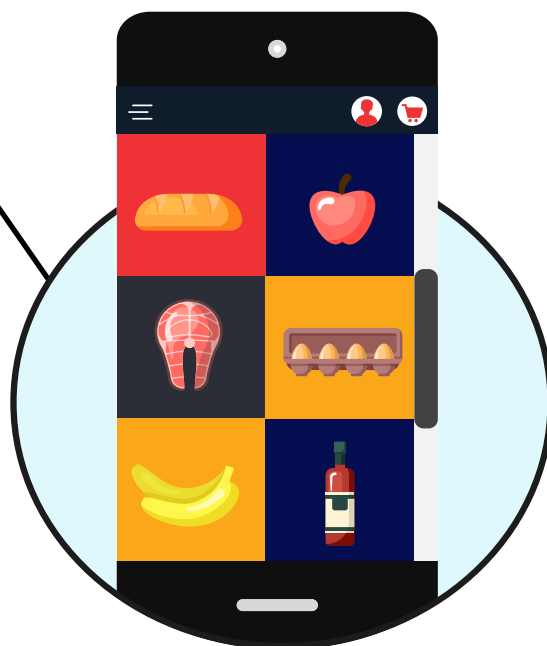
Research by UK consumer watchdog group Which? suggests that less than half of UK shoppers feel safe in supermarkets.¹² There is clearly a job to be done by brands to reassure shoppers of the safety in store. Digital signage and integrated solutions can provide an effective role in clearly communicating aspects of store safety including occupancy numbers, hygiene measures and store policies.

There are considerations that brands should keep in mind when planning in-store messaging or offering new services. Being flexible enough to change messaging and offer a variety of options will be crucial for all retail brands in order to future proof themselves for potential new restrictions and relaxations.



As part of the STRATACACHE family of companies, Scala can offer the occupancy management system Walkbase Intellicount. This system can provide stores and their customers with data on the the numbers of people in store and even areas of the store that are especially busy. This information could be displayed on digital signage at the shop entrance and on the store floor. The information could even be offered via a store app, allowing customers to see at a glance how busy the supermarket is before they even leave home, displaying day-parted charts showing how populated the store tends to be during different times of the day. With a geo-gated functionality, an integrated app could notify the shopper when they are in an assigned range of the store to let them know how busy it is and approximate wait times to enter if applicable. Studies¹³ have previously shown that the busier the store, the more conservative the spending of shoppers is likely to be with research released this year suggesting that stress levels of customers in the presence of other shoppers has been heightened by the Covid-19 pandemic.¹⁴

Another way to mitigate customers' possible reluctance to enter a busy store is to offer appointment shopping. Customers can book a slot in advance, be reminded of their appointment via their app and check in using their personal device when they arrive in the store. A store loyalty app could also be used to assist shoppers in beginning their shop before they even get to the store. A combination of online shopping for branded, non perishable options could be offered. The customer is able to shop for fresh produce in person and then pick up their pre-ordered items in a locker at the store or perhaps have it delivered directly to their car in the car park as previously described. This ability to choose between shopping for some items remotely and some in person may help attract and retain those shoppers dissatisfied with the fresh produce received from an online delivery or those who like browsing in the aisles.



Another way for shoppers to avoid interactions that they may feel unnecessary or potentially dangerous is to offer the ability to browse and purchase without waiting in a queue or interacting with staff. Amazon, who are opening bricks and mortar grocery premises across continents, rely on a technology system that they have dubbed “just walk out” and similar solutions can work for other grocers and be scaled according to customer needs. A combination of digital signage, sensors, AI and the personal device of the shopper can be configured to create shopping experiences as varied as customer preferences. Research suggests that there is an appetite amongst Millennial shoppers for technology to enhance and smooth the supermarket shopping experience. When asked, 46% of UK shoppers aged 25-34 said that they would be happy for sensor technology to be utilised instore if it meant that the technology would offer them shopping prompts such as forgotten items or location of products¹⁵ A customer’s phone can be used to “check in” to a store. Directions to items that may have been added to an in-app shopping list can be shown on a shoppers phone or signage within the store. Shopper’s can pay using contactless payment on their phone while sensors in store can monitor customer movements en masse or as individuals to offer a fully automated Amazon-style proposition or perhaps inform where members of store staff could be deployed to best assist customers.

Loyalty to Local

Shopping local has been a part of the more environmentally-aware trend of customer behaviour for the last few years with shoppers becoming more conscious of the environmental impact of their grocery and shopping choices.¹⁶ Lockdown has only strengthened this trend with the choice to shop local driven not only by an environmental awareness but also by necessity as shoppers failed to get delivery slots from grocery brands¹⁷ or tried to avoid queues at large supermarkets in favour of convenience stores or independent specialist shops such as butchers and bakeries. The desire to shop local moving forward may also be a wish on the part of the consumer to support local businesses that may have struggled to operate over the last year.

There is an appetite amongst Millennial shoppers for technology to enhance and smooth the supermarket shopping experience



Shopper Intentions

According to the Lumina Intelligence Future of Convenience report 2021, more than three quarters (78%) of UK shoppers say it's 'important' or 'very important' to support local suppliers and retailers while 74% said the same about using businesses who give back to the community. The research also found that during 2020, 53% shopped locally more often than they had the year before and that almost half of respondents (42%) plan to continue to shop locally in the future.¹⁸ Other UK research places the number of people who want to support local business as high as 64% with 70% of women looking to support local businesses.¹⁹ However, this trend for local isn't just limited to the UK, with data showing that Australian shoppers also feel strongly about supporting Australian products and produce.²⁰

This attention to local produce and products has already been addressed, in some way, by supermarkets. UK grocery brand Waitrose has made its support of local suppliers a key pillar of its product offering.²¹ Dutch grocery chain Jumbo has designed stores specifically to showcase local products.

Technology in the store can help supermarkets highlight their dedication to local products. Shelf-edge digital displays and end of bay displays can promote local products and direct shoppers to their location in the aisles. Larger screens can tell the full story of a product, highlighting the history of the supplier or demonstrating the environmental difference that the shopper is making in choosing local products. QR codes located on shelf edge screens could unlock videos of the supplier responsible for the products or perhaps offer a recipe download.

It isn't just shopping for local goods that is going to motivate shoppers. Learning more about local and getting involved in the community is also a factor. Nine out of ten UK are retailers considering introducing local community initiatives into stores.²² Again, integrated technology can add momentum and value to these efforts with signage displaying a schedule of events, the ability to book places, give more information or offer products or services that complement the community-minded event.



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43%

of surveyed UK shoppers said that they are ‘likely’ or ‘highly likely’ to join a loyalty scheme if it offered personalised offers.

In-Pocket Potential

As demonstrated by the immediacy of smartphone screens, shoppers, especially younger shoppers, are increasingly consuming information visually. More than 50% of the brain is devoted to visual processing. For retail brands, striking visual communications, including effective signage, is key to engage shoppers — the more relevant the visual experience, the more memorable the store visit will be. The proliferation of smart phones presents a huge opportunity for grocers and their customers. During lockdown, contactless became a popular payment method with people tapping their phones along with their debit and credit cards. QR codes, utilised in the UK as part of the strategy to tackle Covid transmission, also found purpose in the hospitality sector as menus were replaced by a QR code which, when scanned by a patron, launched a brand website or prompted an app download.

behaviour and the demographics that are venturing to which aisles when. Merchandising of products, deployment of marketing and the position of staff members can all be informed, tested and tweaked with an integrated AI solution. QR codes could also play a key role in fulfillment as customers use phone codes to pick up previously made orders as part of a click and collect or parking-lot activation solution.

The phone can also be used as a loyalty card for grocery brands. UK grocer Morrisons recently announced that they would be replacing their cards with an app.²⁴ 55% of UK shoppers say that customer loyalty schemes do not currently give them the things that they want so there is huge scope for retailers, including grocers to use data gained through the use of store apps as well as online shopping, to create compelling promotions and personal offers for their customers.²⁵

43% of surveyed UK shoppers said that they are 'likely' or 'highly likely' to join a loyalty scheme if it offered personalised offers.²⁶ There is a desire for shoppers for a more personalised service and by harnessing the possibilities of integrating data obtained across all customer touchpoints, grocers can create automated recommendations, increase sales and deepen customer satisfaction.

“Data from September 2020 suggests that the QR code is gaining public attention as 54% of European consumers reporting that they had noticed QR codes more since lockdowns began in March 2020 and 58% wanting to see QR codes used more broadly in the future.”²³

In the grocery sector, the launch of the Amazon Fresh stores within the UK show some of the potential for the use of QR codes and short URLs when integrated with other technology to provide a seamless shopping experience for customers. QR integration offers a wealth of possibilities within the grocery sector as a way to offer more to their customers and gather key data to help inform business strategy. Through QR codes, AI, dynamic digital signage and sensor technology, customers who have given required data permissions, can be welcomed to the store or on-screen content can be tweaked to best serve the customers in store. Sensor analytics can reveal patterns of shopping





Price Point Possibilities

The UK entered into a recession in August 2020 and the pandemic has impacted economies across the globe. Research from McKinsey & Company from June 2020 showed that consumers were partaking in shopping behaviours that suggest a more cautious approach to spending such as shopping to a list. In June 2020, 29% of UK respondents were shopping based on a list versus 21% in April. In Germany, the shopping with a list was at 16% in June versus 6% in April. Another trend from the same research focused on households opting to buy cheaper versions of products with households in Italy and Spain buying more cheaper versions of products in June 2020 than they had at the start of lockdown.

Across all surveyed European countries there was a clear trend towards the cheaper version of products with the most profound change taking place in Germany, where just 6% of shoppers were trading down in 2019 but 24% have done so in 2020. Shoppers aren't just trading products, they are also trading grocers and citing better value (28%) or better prices and promotions (27%) as the primary reasons for changing brands.²⁷

Economic uncertainty is likely to remain as nations come out of lockdown and industries reappraise how they will operate in a post-pandemic marketplace. In a time where shoppers are more likely to be price-aware there is an opportunity for grocers to highlight their



43% of surveyed shoppers stating that they would be keen to see promotions on items displayed on shelf-edge technology

competitive pricing strategies with dynamic signage and shelf-edge displays. With a flexible, integrated solution, supermarkets can monitor competitor prices and change and promote their own prices accordingly. Through a central system or a team tablet or perhaps even an authorised staff member's phone, prices can be amended quickly with price changes in one store, across a region or the whole country. Integrated signage would promote the new price point on screens, at the end of aisles and on the shelf-edge displays. As with sensor technology, millennial shoppers appreciate the benefit of shelf-edge electronic signage with 43% of surveyed shoppers stating that they would be keen to see promotions on items displayed on shelf-edge technology and 46% welcoming recipe ideas.²⁸ Also able to reduce store inefficiencies as well as offer more to shoppers, shelf-edge signage when combined with sensors or cameras can alert staff to stock shortages or misplaced items on shelves.

But there is only so much discounting that grocers can do in a highly-competitive marketplace. In addition to highlighting value, supermarkets will also have to demonstrate a deeper appreciation and understanding of their customers. Eliminating customer pain points such as waiting times, stock availability and poor service is one way of doing this. Creating new service models and modes of interaction by using data gained from the various customer touchpoints will be essential for grocers to stay relevant and top of mind in a competitive marketplace.

Conclusion

This white paper has identified some of the key trends likely to impact grocery retail moving forward and detailed a few digital solutions which could make the most of the opportunities presented by those trends. Fundamental to the success of any new digital investment or implementation is finding the right technology partner. Retailers should look to find a technology partner who understands the potential of their business and are able to power digital implementation in the future with a sound strategy and deep knowledge of the process to mitigate risk and optimise for future inclusions or growth. Scala is a proven, trusted technology partner with an integrated hardware, software, services and support solution powering digital solutions across retail brands of all types. Talk to a Scala solutions expert today to discuss business goals and how an integrated solution could benefit your brand.

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Endnotes

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About Scala

Scala solutions deliver engaging retail experiences by connecting networks of digital signs, kiosks, mobile devices, websites and Internet-connected devices. Scala, a STRATACACHE company, provides the platform for marketers, retailers and innovators to easily create and centrally manage deployment of shopping experiences while retaining the flexibility to rapidly adapt to local business conditions and preferences of customers in the store. With 30 years' experience, Scala is well-known for its innovation and leveraging best-of-breed technologies to create solutions that are easy-to-use, yet infinitely customizable.

Scala has US-based headquarters near Philadelphia, PA and EMEA headquarters in the Netherlands, and has offices in 28 countries, clients in over 100 countries and support for 20+ languages in the platform.



SCALA

Scala EMEA Headquarters
Wolf en Hertzdahlstraat 22
6131 MV Sittard, The Netherlands
P: +31468080151

Scala UK
Meadow House
Southings Manor Farm
Gaddesden Row
HP2 6HX, United Kingdom

Scala France
3 Rue du Colonel Moll
75017 Paris, France

Scala Nordic AS
Vollsveien 13C
1366 Lysaker, Norway

For more information, visit our [website: scala.com](https://www.scala.com)