Global Self-Ordering Kiosks

RESEARCH OVERVIEW

datos
INSIGHTS

About RBR Data Services, a division of Datos Insights

RBR Data Services provides clients with independent and reliable data and insights through published research, consulting and bespoke data services. Its global research covers the cards and payments, retail technology and banking automation sectors and is used by the leading market participants, analysts and regulators as the authoritative source of industry and competitor benchmark data.

Datos Insights is the advisor of choice to the banking, insurance, securities, and retail technology industries–both the financial institutions and the technology providers who serve them. We help our clients make better technology decisions so they can protect and grow their customers' assets.

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The third edition of the only dedicated study of the fast-growing self-ordering kiosk market, adds hardware expenditure data

The shift towards a self-service environment in the hospitality sector continues apace

- Operators are facing cost pressures and labour shortages, with self-ordering kiosks helping to boost efficiency, capacity and ticket size

- Consumers increasingly expect a choice of convenient, self-directed digital journeys

- Vendors need greater, in-depth intelligence on this exciting, growing market

The study provides vendors with intelligence on the market and their competitors

- Understand market size, shape and future growth, to identify and assess opportunities

- Benchmark versus competitors, overall as well as by geography and device screen size

- Provide authoritative, independent substantiation of market presence in marketing collateral

Global Self-Ordering Kiosks provides vendor and market data, forecasts and commentary for 24 countries

Data	**Market sizes** and **vendor shares** for both **hardware** and **software**
Metrics	Units (**shipments** and **installed base**), and **Value** (hardware expenditure)
Geographies	**Global data** including figures for **24 key country markets**
Dates	Year ending **June 2023**, historical data and **forecasts** to 2028
Segments	Screen <19", 19-30", >30"

Definitions

Included	Excluded
• Ordering of food and/or beverages for separate fulfilment	• Vending kiosks directly fulfilling food, beverages etc.
• Fully self-service including selection and payment	• Lacking payment functionality • Requiring systematic employee assistance
• Quick-service and fast-casual restaurants • For eat-in, take-out or drive-through orders	• Table service restaurants • Non-foodservice deployment

The study methodology builds on our expertise in large-scale, global studies, designed to ensure comparability and reliability

Collect

Data gathered from all major vendors

- RBR Data Services solicits information from industry suppliers
- Primary data complemented with secondary research
- Overall 100+ vendors covered

Validate

Accuracy of claims verified using variety of sources

- RBR Data Services' data on POS and store networks
- Press releases plus specialist and mainstream media
- Annual reports and stock exchange filings
- Industry experts from around the world
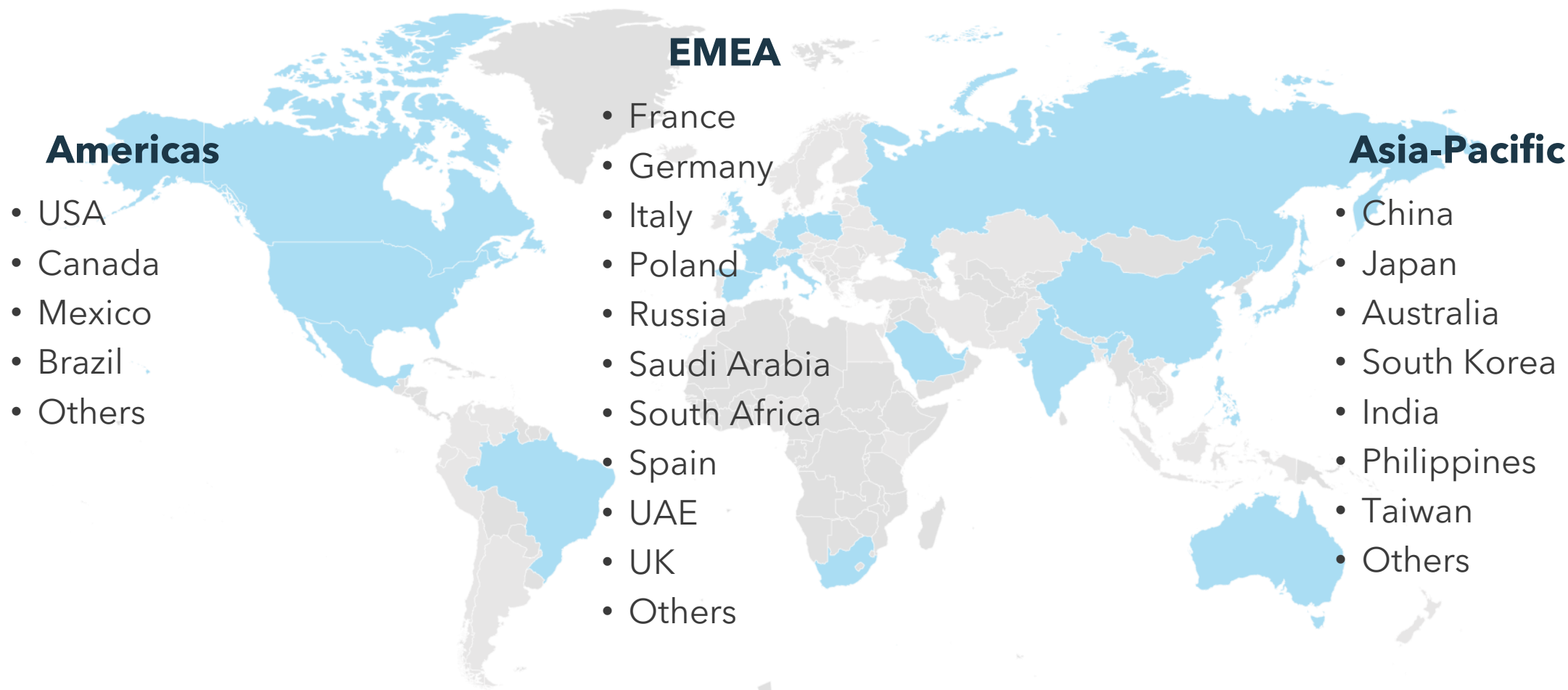
Analyse

Leveraging RBR expertise in drawing insights from data

- Data analysed by country, vendor, screen size etc.
- Identify partnerships between vendors and OEMs
- Commentary delivers key insights on market size and shape

The study leverages RBR's expertise in syndicated retail research studies, its deep knowledge of the kiosk market and its ability to draw insights from data

The study provides global data, including figures for 24 major country markets

EMEA

- France
- Germany
- Italy
- Poland
- Russia
- Saudi Arabia
- South Africa
- Spain
- UAE
- UK
- Others

Americas

- USA
- Canada
- Mexico
- Brazil
- Others

Asia-Pacific

- China
- Japan
- Australia
- South Korea
- India
- Philippines
- Taiwan
- Others

Ease of use, and access to the RBR team, maximises value across your organisation

Deliverables collectively address clients' core market intelligence needs

Market Report
- Key market statistics, trends and commentary by country
- Regional and global comparative analyses
- Familiar PowerPoint format facilitates re-use of material

Market Database
- Excel format enables use across your organisation
- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis

Video Conference
- Live session to present findings and discuss implications

Analyst Access
- Ongoing access to senior RBR Data Services researchers
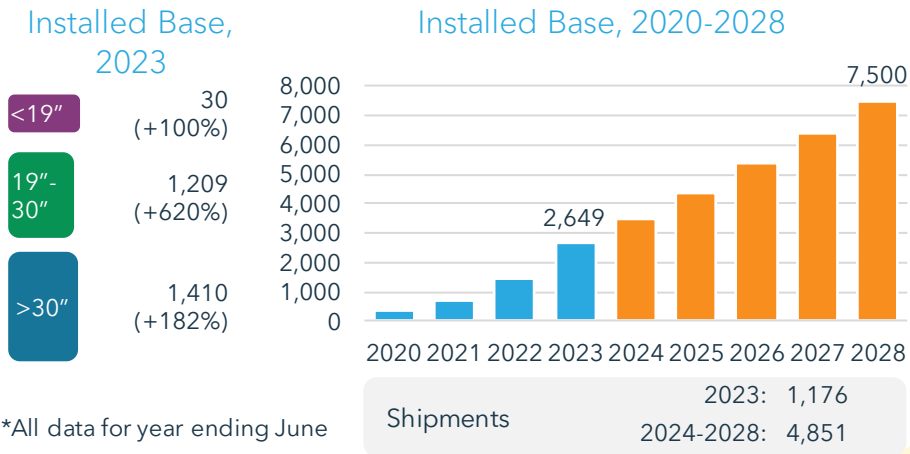
Study pricing
£30,000

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Self-ordering kiosk rollouts accelerate in the Philippines

Key Market Insights

Installed Base, 2023

<19"	30	(+100%)
19"-30"	1,209	(+620%)
>30"	1,410	(+182%)

Installed Base, 2020-2028

7,500

2,649

Shipments	2023:	1,176
	2024-2028:	4,851

*All data for year ending June

- There were more than 2,600 self-ordering kiosks at restaurants in the Philippines as of June 2023
  - Since June 2021, the number of kiosks nearly quadrupled
- 1,700 kiosks were installed at McDonald's more than 700 outlets at June 2023 as the company upgrades its restaurants as part of a 'NXTGEN' strategy
- Local groups Jollibee Foods has deployed kiosks across several of its brands, including Chowking
- KFC has been rolling out kiosks, with plans to have installations at 100 stores by the end of 2023
- The installed base is forecast to near 7,500 kiosks in 2028

Major Chains' Kiosk Deployment

Chain	Stores	Kiosks
Jollibee	1,489	300
McDonald's	705	1,700
Mang Inasal	574	
Chowking	560	80
Red Ribbon	527	
Starbucks	418	
KFC	355	126
Dunkin' Donuts	263	
Pizza Hut	140	
Burger King	125	
Total	**5,156**	

Selected other operators: Greenwich

The Market Database provides market and vendor data by country, including installations, shipments and segmentation

Global Self-Ordering Kiosks 2024

Self-Ordering Kiosk Hardware Installed Base - by Screen Size, Vendor, Region, Country and Year (All Segments)

Confidential - Client Internal Use Only

Source: RBR Data Services

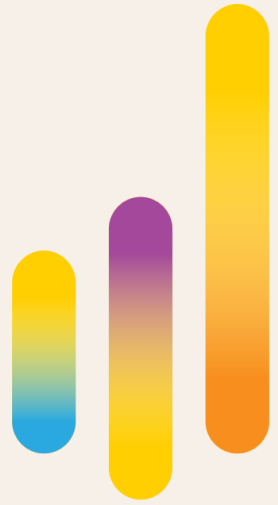| Screen Size	Year	Region	Country	Total	Acrelec	Apple	CCL Technology	CITECH	Coates Group	Diebold Nixdorf	Evoke	Glory	HiStone	M4B	NICE I&T	Palas	Panasonic	REDYREF	Samsung
All	2023	Asia-Pacific	Australia																
All	2023	Asia-Pacific	China																
All	2023	Asia-Pacific	India																
All	2023	Asia-Pacific	Japan																
All	2023	Asia-Pacific	Philippines																
All	2023	Asia-Pacific	South Korea																
All	2023	Asia-Pacific	Taiwan																
All	2023	Asia-Pacific	Other																
All	2023	Asia-Pacific	Total																
All	2023	Americas	Brazil																
All	2023	Americas	Canada																
All	2023	Americas	Mexico																
All	2023	Americas	USA																
All	2023	Americas	Other																
All	2023	Americas	Total																
All	2023	Europe, Middle East and Africa	France																
All	2023	Europe, Middle East and Africa	Germany																
All	2023	Europe, Middle East and Africa	Italy																
All	2023	Europe, Middle East and Africa	Poland																
All	2023	Europe, Middle East and Africa	Russia																
All	2023	Europe, Middle East and Africa	Saudi Arabia																

SAMPLE - NOT FOR COMMERCIAL USE

RBR Data Services has deep retail and hospitality industry knowledge, researching various store technologies

Key Qualifications

- **35 years' experience** delivering international market research to diverse blue-chip client base

- **Expertise** in hardware, software and services

- **Dedicated self-checkout hardware research** since 2008

- **Strong understanding of general and technology trends** in retail and hospitality industries

- **Reputation for premium, independent syndicated research** studies funded by industry suppliers

Types of client

- **Technology suppliers** e.g. Diebold Nixdorf, Epson, Fiserv, Fujitsu, Glory, HP, Microsoft, NCR, Toshiba, Zebra

- **Retailers** e.g. Auchan, X5 Retail

- **Payment firms** e.g. American Express, Mastercard, Visa

- **Consultancies** e.g. Bain & Company, Boston Consulting Group

- **Investment banks and investors** e.g. Advent International, Elliott Management, Goldman Sachs