

Global ATM Intelligence Service



ATM Industry Disruption Accelerating - Adapt Now or Be Left Behind


Banking Evolution: The Make-or-Break Moment for ATM Vendors

- Financial institutions are rapidly re-evaluating their ATM ownership strategies, which has direct implications for vendors and independent deployers
- ATM providers, without strategic market intelligence, risk missing the unprecedented opportunity window as banks shift to partner-based models
- First-mover vendors with superior insights are already securing long-term contracts and premium locations, locking competitors out of emerging high-profit segments

Competitive Edge: Intelligence-Driven Success


- Our comprehensive ATM market intelligence research provides comparative market and player data, helping you to identify emerging areas of opportunities
- Detailed regional analysis exposes critical shifts in consumer expectations, competitive positioning, and regulatory requirements
- Trend forecasting provides early warning of disruptive market changes, enabling a shift in position and strategic advantage

Unmatched Methodology: Data You Can't Find Anywhere Else



QUANTITATIVE BASELINE

- Robust 30-year ATM data baseline
- Unparalleled model of ATM deployment, features, and usage for 60+ markets
- Supplemented by branch transformation research and ATM strategy research programme



TRIANGULATION & VALIDATION

- Robust forecast review process
- Regional and global totals reconciled with country-specific primary data




SECONDARY RESEARCH

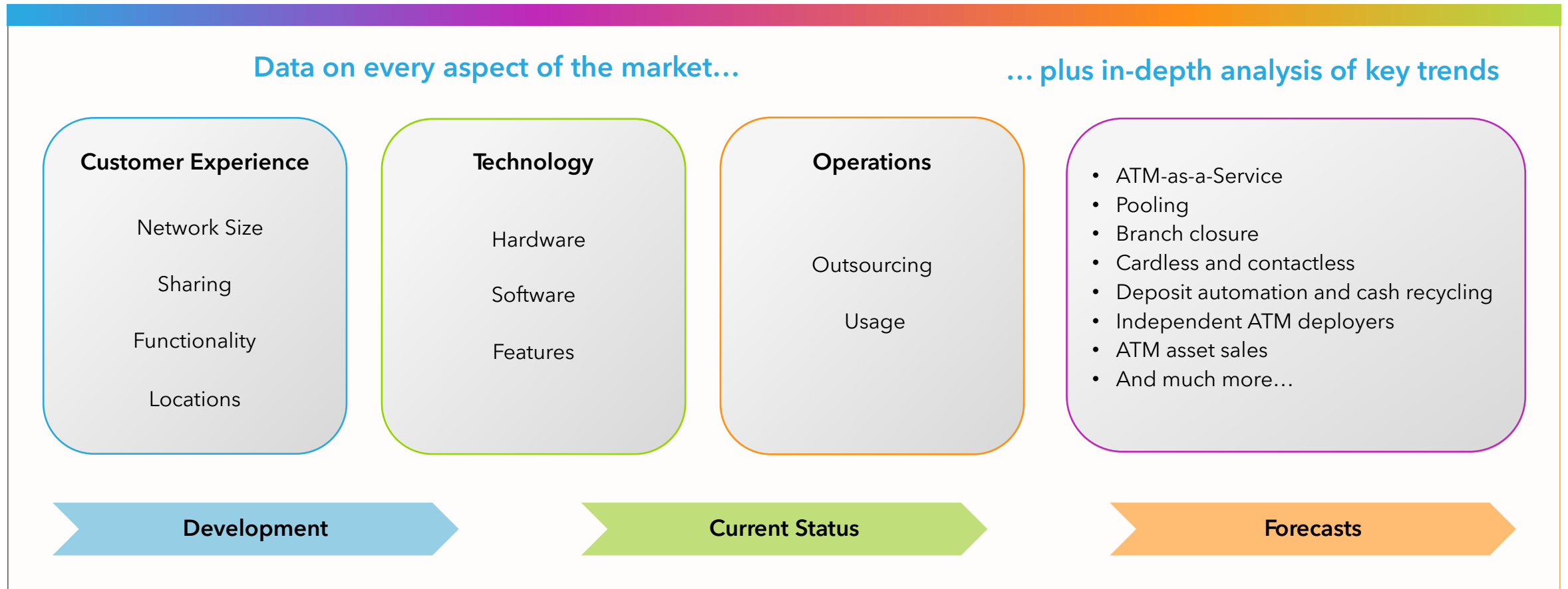
- Published data from central sources and major players in each market
- In-depth investigation to determine scope/completeness of data and adjust for consistency
- Assessment of published data sets to eliminate cross-market inconsistencies



PRIMARY RESEARCH

- Ongoing monitoring of product offerings and use cases in each market
- Strategic insights from interviews and questionnaire sent to hundreds of banks, independent ATM deployers, shared ATM networks, and other key players
- Relationships with key institutions (e.g. central banks) provides additional non-public data

360° ATM Intelligence: The Comprehensive View That Drives Success



Comprehensive View of ATM Operations: From Recent Developments to Future Forecasts

Global ATM Intelligence Service Database				
Domain(s)	Topic	Enhanced markets (29)	Standard markets (29)	Secondary markets (48)
Network Size	Country ATM installed base	1995-2030	1995-2030	1995-2030
	ATM numbers by deployer	2023-2024	2023-2024	2023-2024
	Branch numbers by bank			
Usage	Number and value of cash withdrawals	2020-2030	2020-2030	2020-2030*
Locations	Locations	2020-2024	2020-2024	2020-2024*
Hardware	Supplier market shares			
	Shipments forecasts	2025-2030	2025-2030	2025-2030
Sharing	Participation in sharing arrangements	2024	2024	
Functionality	Deposit automation, cash recycling and other functionality			
Features	Hardware and security features			
Outsourcing	Outsourcing practices by function [†]	2020-2024		
	Supplier market shares by function	2024		
Software	Supplier and product market shares by type [‡]			
All	Full ATM network details by deployer			

* Majority of markets
† Cash replenishment, first line maintenance, second line maintenance, help desk
‡ Terminal driving, application, operating system, management/monitoring, remote software distribution, CRM, cash forecasting and management, security

Data Coverage: 230 Countries & Territories Around the World

Region	Enhanced Markets	Standard Markets	Secondary Markets
Asia-Pacific	Australia, India, Indonesia, Malaysia, Pakistan, Philippines, Taiwan, Thailand, Vietnam	Bangladesh, China, Japan, New Zealand, Singapore, South Korea	Cambodia, Hong Kong, Macau, Mongolia, Nepal, Sri Lanka
North America	Canada, USA		
Latin America and the Caribbean	Brazil, Mexico	Argentina, Chile, Colombia, Ecuador, Peru	Bolivia, Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Jamaica, Panama, Paraguay, Puerto Rico, Trinidad & Tobago, Uruguay
Western Europe	Austria, Belgium, France, Germany, Greece, Italy, Netherlands, Portugal, Spain, Switzerland, Turkey, UK	Denmark, Ireland, Sweden	Finland, Norway
Central and Eastern Europe	Poland, Ukraine	Belarus, Bulgaria, Croatia, Czech Republic, Hungary, Kazakhstan, Romania, Russia, Uzbekistan	Albania, Armenia, Azerbaijan, Bosnia & Herzegovina, Estonia, Georgia, Kyrgyzstan, Latvia, Lithuania, Moldova, North Macedonia, Serbia, Slovakia, Slovenia, Turkmenistan
Middle East and Africa	Nigeria, South Africa	Egypt, Iran, Israel, Morocco, Saudi Arabia, UAE	Algeria, Angola, Ghana, Jordan, Kenya, Kuwait, Lebanon, Mozambique, Oman, Qatar, Tanzania, Tunisia, Zambia

* In addition to the above countries and territories, the Database also includes key statistics for 124 smaller markets

Unrestricted Team Access: Maximising Value Across Your Company



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

- Charting tool facilitates production of bespoke outputs
- Comprehensive data easily extracted for further analysis



Video Conference

- Live session to present findings to your organisation and discuss implications



Expert Support

- Subject matter experts to aid understanding of data and underlying assumptions

Deep Market Intelligence and Expert-driven Analysis

We empower banking technology vendors through market intelligence and expert insights, helping them identify opportunities, benchmark against competitors, and understand how financial institutions leverage technology to solve business challenges.

COMPREHENSIVE COVERAGE

Full global coverage, including 230 countries and territories

Robust data and insights on every facet of the ATM ecosystem

Data and insights on major market players

DEEP MARKET UNDERSTANDING

Multilingual in-house team

Deep industry focus and country expertise

Proprietary research; reliable forecasts

LONG-TERM COMMITMENT

Covering banking automation for >35 years

Reputation for integrity and independence

The authoritative research provider trusted by the industry's major players

FIND OUT MORE



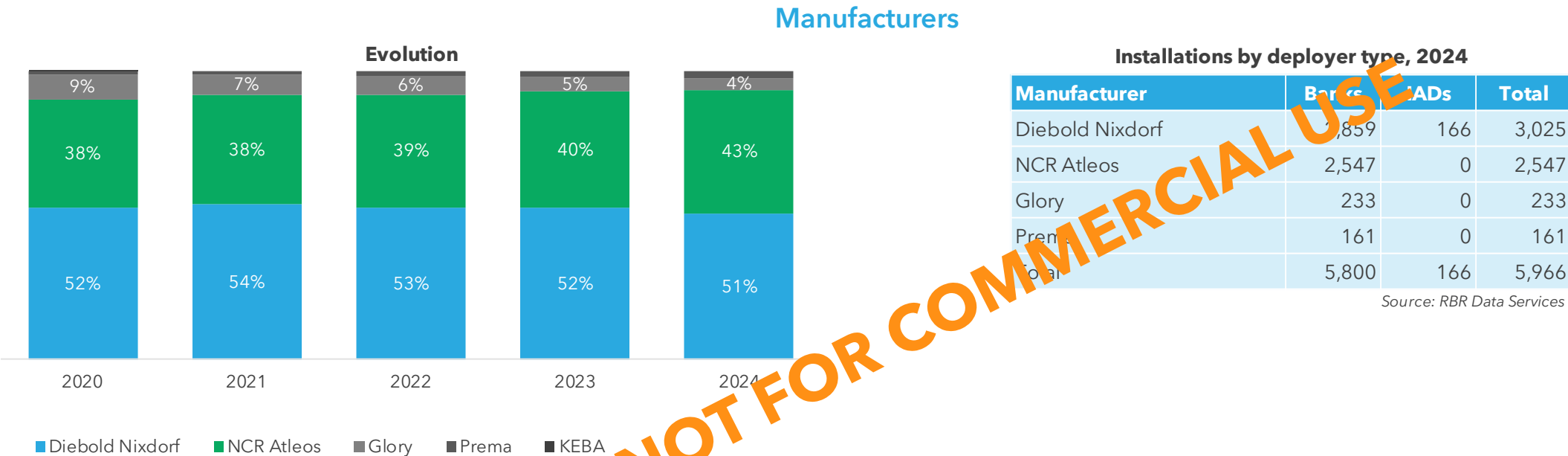
Rowan Berridge
Banking Automation Lead

[Contact Us](#)

DATOS INSIGHTS CLIENTS INCLUDE

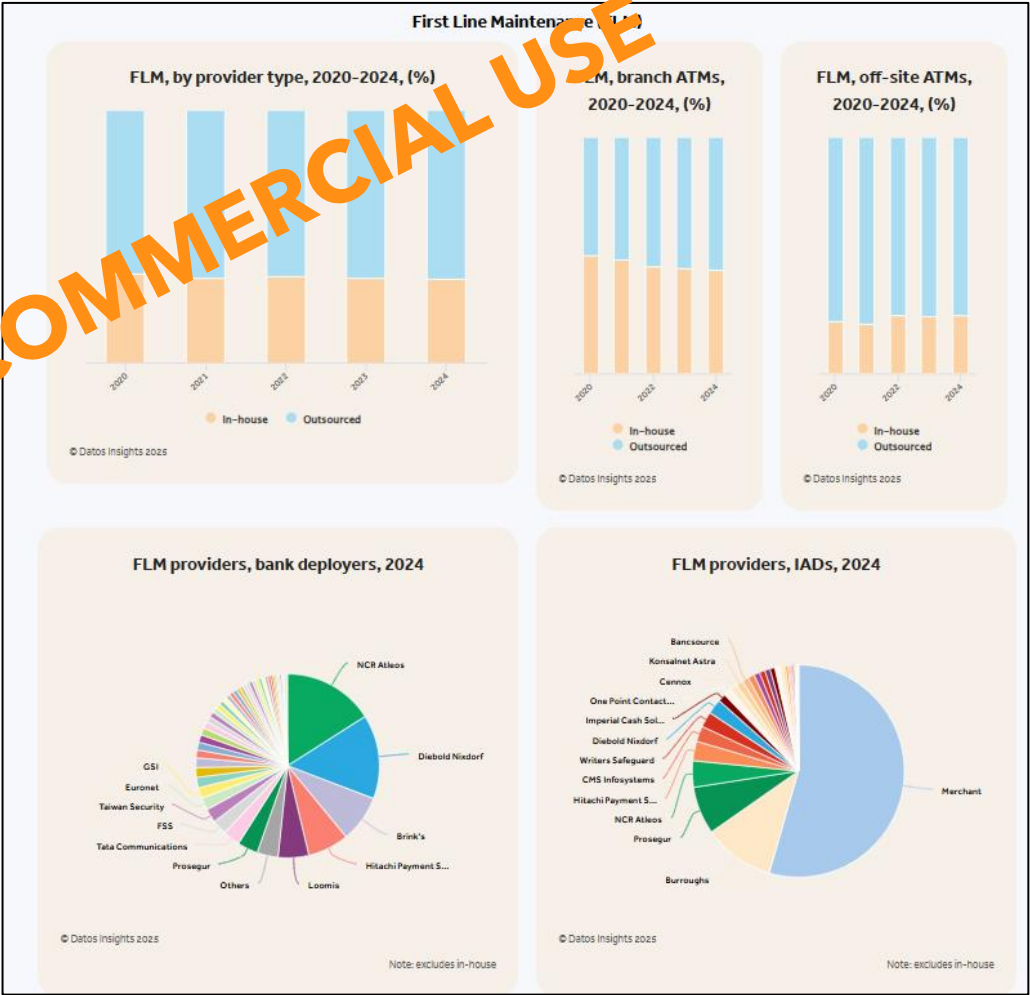
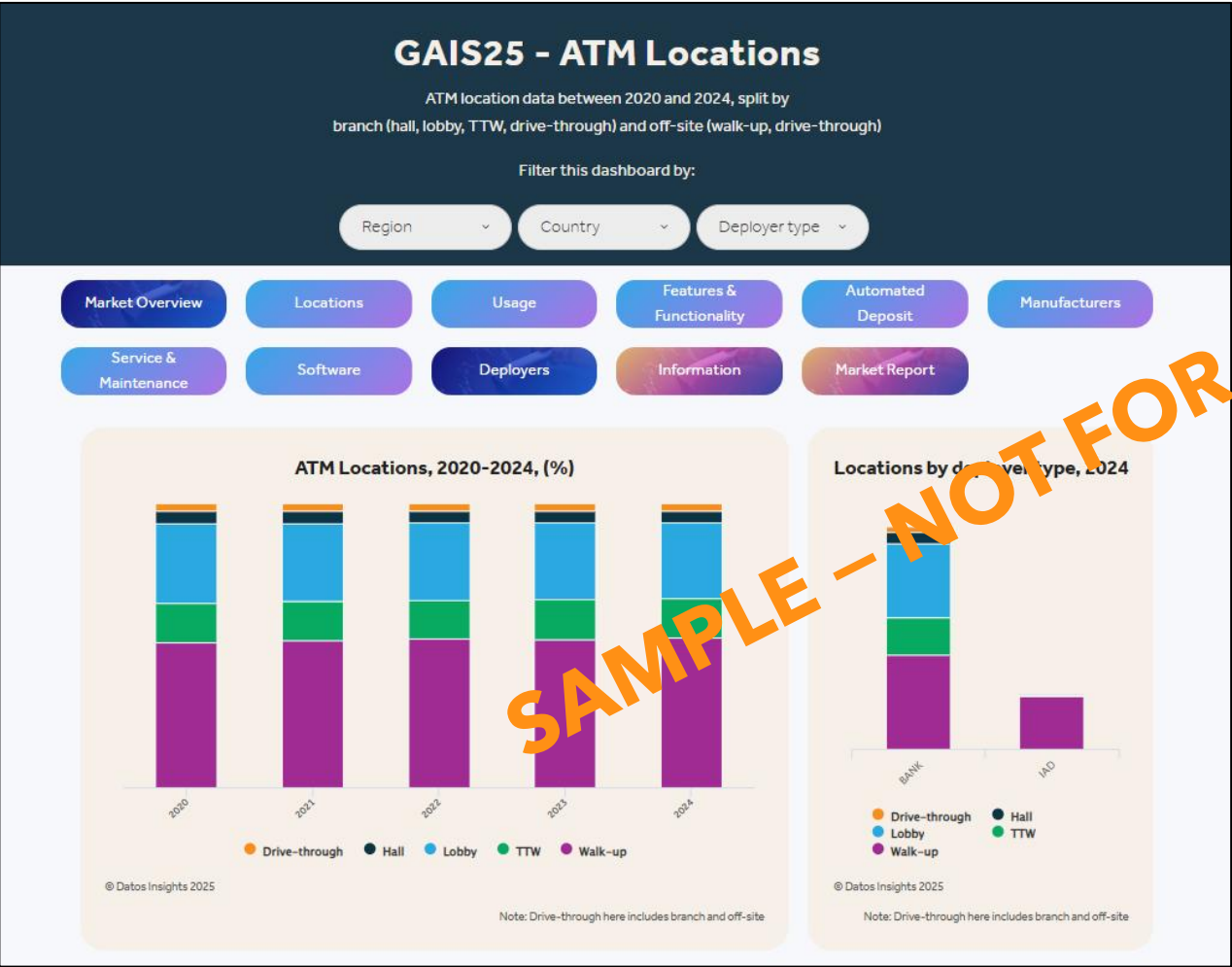


Glory to stop maintaining ATMs, leading to further concentration in the vendor market in Switzerland



- Diebold Nixdorf and NCR Atleos together account for more than 90% of the Swiss ATM installed base, with a small number of Glory and Prema machines still in use. All Prema terminals are deployed by Raiffeisen Group
- Glory has however announced an end to ATM maintenance in 2026, meaning that the small number of its machines still in Switzerland are likely to be removed in the next few years. Postfinance accounts for 96% of the Glory terminals in the country
- Diebold Nixdorf's DN series and NCR Atleos' SelfServ series of machines are the most widely used models in the country, with NCR Atleos' SelfServ 84 model alone accounting for 27% of ATMs in Switzerland
- NCR Atleos gained three points of market share in 2024 at the expense of Diebold Nixdorf, meaning that the latter's market share has now fallen to 51%. The Raiffeisen Group is NCR Atleos' largest customer in Switzerland, accounting for 45% of its terminals

Access Our ATM Market Database Through an Interactive Online Platform With Custom Filtering and Charting Tools



Accelerating Financial Services Transformation Through Actionable Intelligence

Datos Insights is the leading research and advisory partner to the financial services industry. We deliver unmatched intelligence through our proprietary research and data, deep practitioner expertise, and actionable insights that accelerate critical initiatives.

Transform Decision Making

Gain strategic foresight to confidently navigate market shifts

Optimize Performance

Benchmark your operations against peers to drive efficiency and growth

Accelerate Key Initiatives

Identify emerging opportunities, de-risk your strategy, and reduce time-to-market





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INSIGHTS