Global ATM Intelligence Service

The ATM Landscape Is Shifting Fast – Position Now or Fall Behind

Banking Transformation: A Critical Juncture for ATM Vendors

- Financial institutions are fundamentally rethinking ATM ownership models, with far-reaching consequences for vendors and independent deployers
- ATM technology and services providers, without strategic market intelligence, risk missing the unprecedented opportunity window as banks shift to partner-based models
- Forward-thinking vendors with better market insight are already staking claims to high-value contracts and locations – closing the door on slower-moving competitors

Competitive Edge: Intelligence-Driven Success

- Our in-depth ATM market research delivers comparative data across markets and players, helping you to identify emerging areas of opportunities
- Granular regional analysis reveals 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 50+ 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
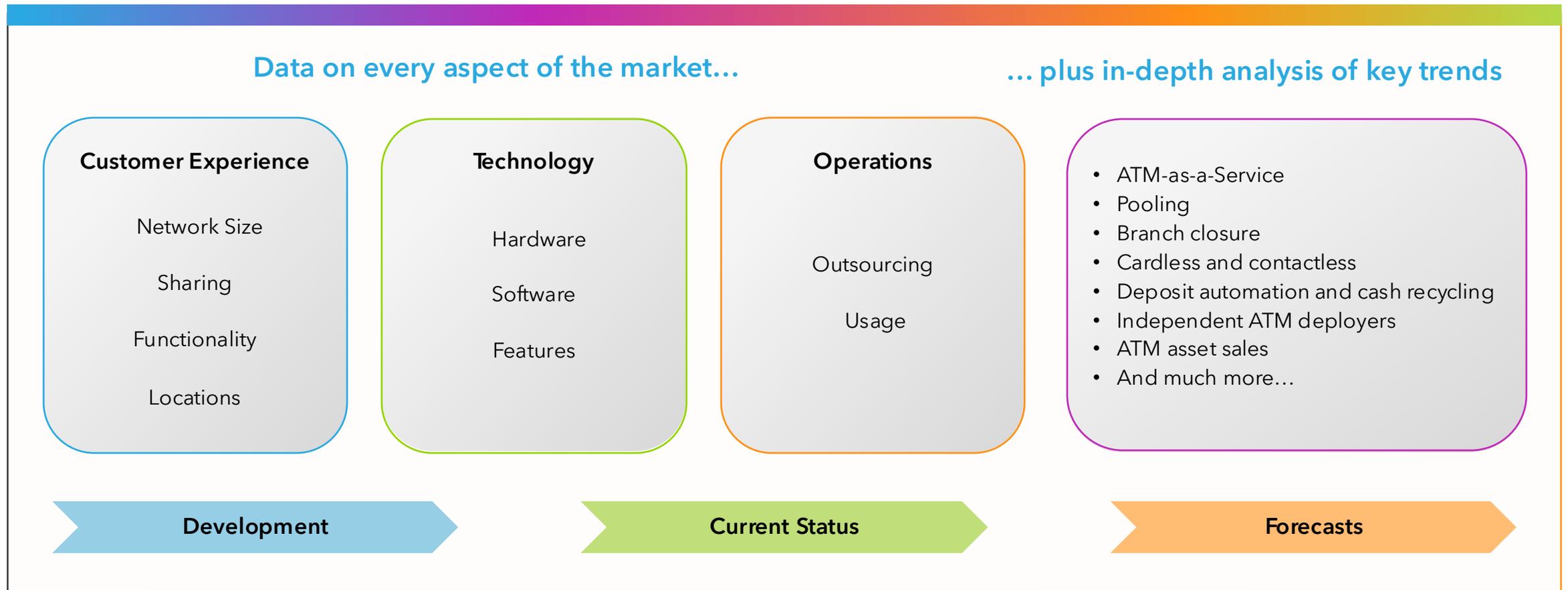
SECONDARY RESEARCH

- 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

QUANTITATIVE BASELINE

SECONDARY RESEARCH

TRIANGULATION & VALIDATION

PRIMARY RESEARCH

datos
INSIGHTS

360° ATM Intelligence: The Comprehensive View That Drives Success

Data on every aspect of the market...

... plus in-depth analysis of key trends

Customer Experience

Network Size

Sharing

Functionality

Locations

Technology

Hardware

Software

Features

Operations

Outsourcing

Usage

- ATM-as-a-Service
- Pooling
- Branch closure
- Cardless and contactless
- Deposit automation and cash recycling
- Independent ATM deployers
- ATM asset sales
- And much more...

Development

Current Status

Forecasts

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

Global ATM Intelligence Service Database				
Domain(s)	**Topic**	**Enhanced markets (20)**	**Standard markets (35)**	**Secondary markets (51)**
Network Size	Country ATM installed base	1995-2028	1995-2028	1995-2028
	ATM numbers by deployer	2024-2025	2024-2025	2024-2025
	Branch numbers by bank			
Usage	Number and value of cash withdrawals	2021-2028	2021-2028	
Locations	Locations	2021-2025	2021-2025	
Hardware	Supplier market shares			
	Shipments forecasts	2026-2028	2026-2028	2026-2028
Sharing	Participation in sharing arrangements	2025	2025	
Functionality	Deposit automation, cash recycling and other functionality			
Features	Hardware and security features			
Second Line Maintenance	Outsourcing practices	2021-2025		
	Supplier market shares	2025		
Software	Supplier and product market shares by type‡			
All	Full ATM network details by deployer			

‡ 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	India, Indonesia, Malaysia, Philippines, Thailand, Vietnam	Australia, Bangladesh, Japan, New Zealand, Pakistan, South Korea, Taiwan	Cambodia, China, Hong Kong, Macau, Mongolia, Nepal, Singapore, 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	Belgium, France, Germany, Italy, Spain, Turkey, UK	Austria, Denmark, Greece, Ireland, Netherlands, Portugal, Sweden, Switzerland	Finland, Norway
Central and Eastern Europe	Poland	Belarus, Bulgaria, Croatia, Czech Republic, Hungary, Kazakhstan, Romania, Russia, Ukraine, 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, Israel, Morocco, Saudi Arabia, UAE	Algeria, Angola, Ghana, Iran, 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

AMERICAN EXPRESS · mastercard · VISA · DN Diebold Nixdorf · HITACHI · HYOSUNG · OKI · FUJITSU · NCR ATLEOS · CapitalOne · UniCredit Bank · CIBC · BRINKS · nexi · fiserv. · SESAMi · GLORY

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

Manufacturers

Evolution

|	2020	2021	2022	2023	2024
Glory/Prema	9%	7%	6%	5%	4%
NCR Atleos	38%	38%	39%	40%	43%
Diebold Nixdorf	52%	54%	53%	52%	51%

■ Diebold Nixdorf ■ NCR Atleos ■ Glory ■ Prema ■ NCR
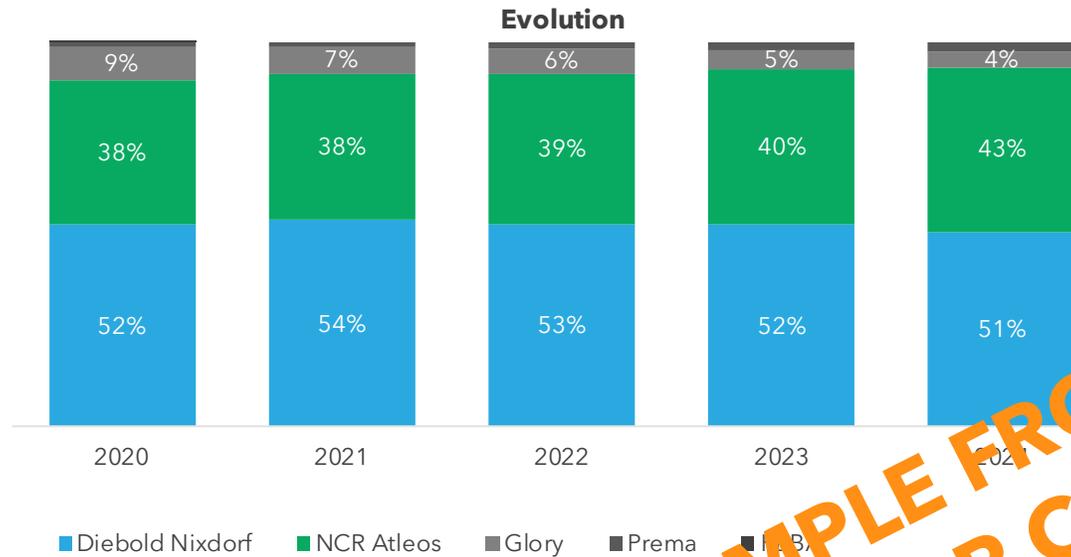
Installations by deployer type, 2024

Manufacturer	Banks	IADs	Total
Diebold Nixdorf	2,859	166	3,025
NCR Atleos	2,547	0	2,547
Glory	233	0	233
Prema	161	0	161
Total	5,800	166	5,966

Source: RBR Data Services

- 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
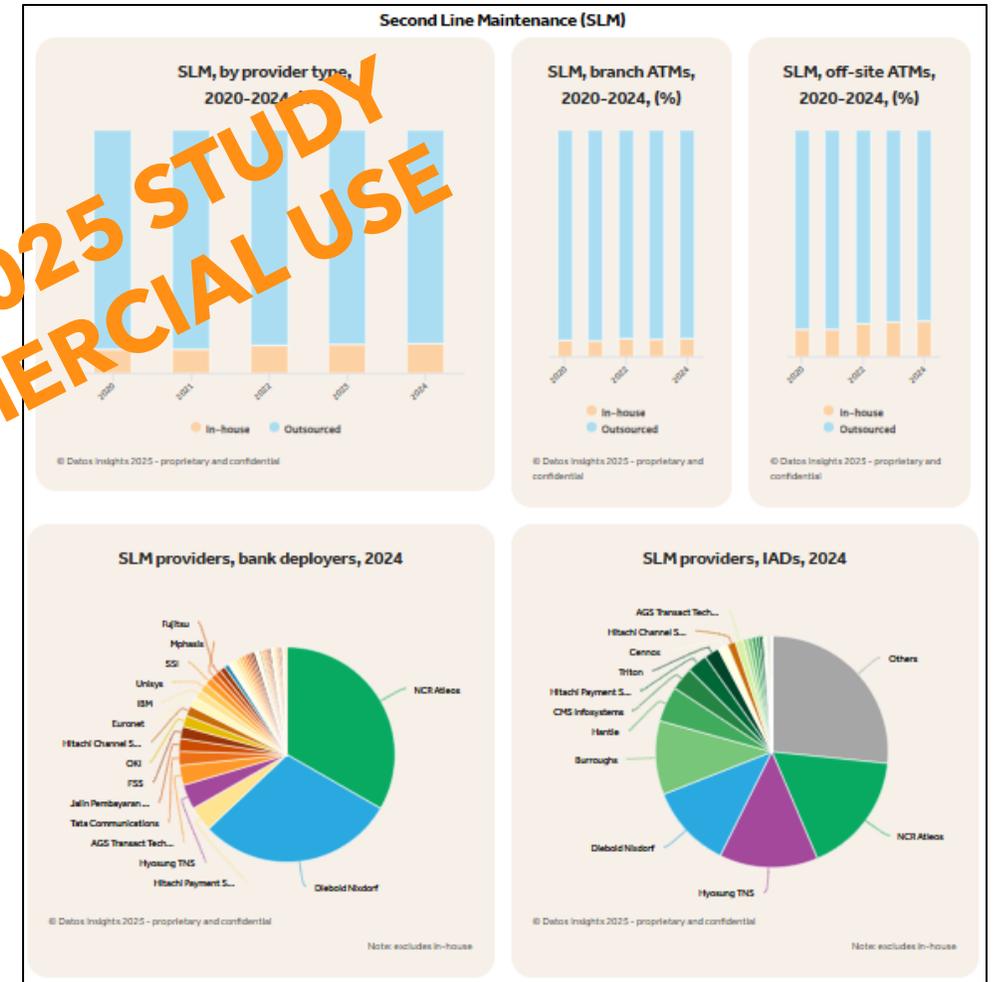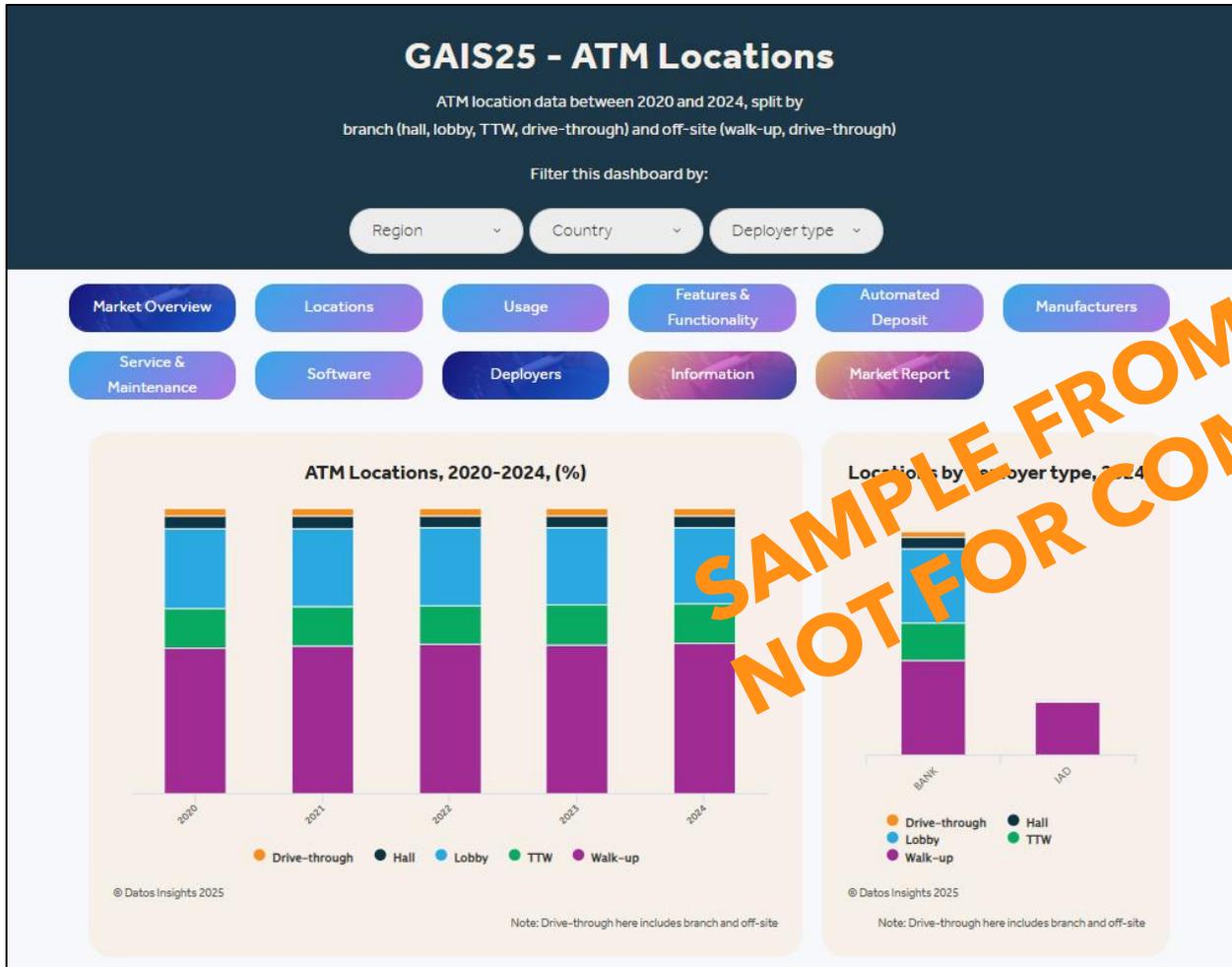
Datos Insights Powers Financial Services Transformation

Datos Insights is the leading research and advisory partner to the banking, insurance, securities, and payments industries—both the financial services firms and the technology providers who serve them.

In an era of rapid change, we empower firms across the financial services ecosystem to make high-stakes decisions with confidence and speed. Our distinctive combination of proprietary data, analytics, and deep practitioner expertise provides actionable insights that enable clients to accelerate critical initiatives, inspire decisive action, and de-risk strategic investments to achieve faster, bolder transformation.

INSIGHTS & ADVISORY

DATA & INTELLIGENCE

CONSULTING
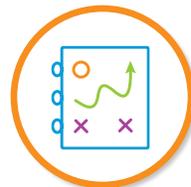
EVENTS

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