

STUDY OVERVIEW

# Global Self-Ordering Kiosks 2020

Executive Report and Market Database

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[www.rbrlondon.com/retail](http://www.rbrlondon.com/retail)

## RBR's international study of restaurant self-ordering kiosks addresses the current lack of data on this fast-growing market

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### **Self-ordering kiosks are a key component of the new self-service paradigm in the restaurant sector**

- ▶ Consumers expect convenient restaurant experiences, while operators face diverse cost pressures
- ▶ Self-ordering kiosks have been used to boost efficiency, capacity, ticket size and guest satisfaction
- ▶ Suppliers lack a reliable, international view of their market presence and that of their competitors



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

- ▶ Understand market size, shape and features, in order to identify future 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 2020* provides the first comprehensive view of the world's key markets for self-service terminals in the restaurant sector

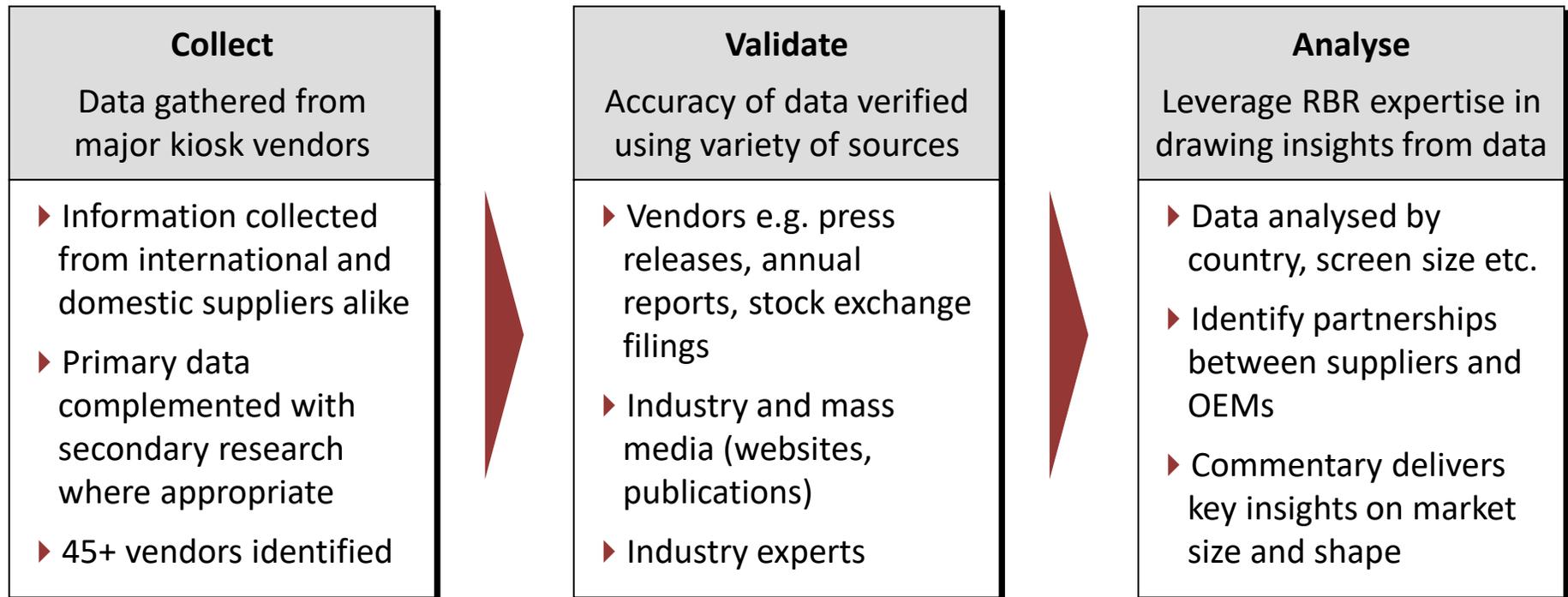
Scope	
<b>Products</b>	<b>Restaurant self-ordering kiosks</b> including payment functionality <sup>1</sup>
<b>Geographies</b>	<b>Global data</b> including figures for <b>22 country markets</b>
<b>Segmentation</b>	<b>Screen size:</b> <19", 19-30", >30"
<b>Metrics</b>	<b>Installed base</b> and <b>shipments</b> for year ending June 2019
<b>Vendors</b>	<b>45+ suppliers</b> including Acrelec, Coates Group, Diebold Nixdorf, Elo, Evoke, Glory, KIOSK, Lilitab, Posiflex, Taiyun, Toshiba, Tillster and Zivelo

<sup>1</sup> For full details of scope, see Appendix

## The study provides global data, including figures for 22 country markets



## The study combines primary and secondary research with RBR's in-house data, market understanding and research expertise



## Study clients receive an executive report and a comprehensive market database, plus access to RBR's project team

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- ▶ Printed and electronic (multi-user licence) copies of research findings
  - Executive report in PowerPoint containing key market facts and commentary by country
  - Market Database in Excel
- ▶ A conference call presentation of the study results can be organised if desired
- ▶ Privileged access to RBR's senior researchers
- ▶ The study price is £25,000

*If you have questions, or to place an order, please contact  
Tom Hutchings on +44 20 8831 7306 or [tom.hutchings@rbrlondon.com](mailto:tom.hutchings@rbrlondon.com)*

# International and local chains have started to install self-ordering kiosks in India, but the market is still in its early stages

### Key Market Insights

**Total**  
1,050  
#15 of 22 countries

**Total Shipments**  
Year Ending June 2019  
300  
#14 of 22 countries

**Installed Base, June 2019**

20 <19"

780 19"-30"

250 >30"

**Screen Size Segmentation**

- ▶ More than 1,000 self-ordering kiosks have been installed in India, with the technology deployed by both international and local brands
- ▶ The first deployments were in 2012, when a small number of kiosks were installed in a KFC outlet in Delhi and a Taco Bell store in Bangalore, although these were later removed
- ▶ Westlife Development, which operates 290 McDonald's outlets in South and West India, has deployed self-ordering terminals in some of its stores
- ▶ KFC has around 50 kiosks, all of which have been installed in the year to June 2019; it operates through nearly 400 restaurants
- ▶ Chai tea café chain Chaayos, which has more than 60 outlets in India, has installed kiosks at some locations
- ▶ Other domestic chains to trial self-ordering terminals include Hot Chips

### Major Chains' Kiosk Deployment

Chains	Stores	Kiosk User?
Cafe Coffee Day	1,750	
Domino's	1,243	
Baskin-Robbins	675	
Subway	659	
Pizza Hut	430	
KFC	395	✓
Costa Coffee	333	
McDonald's	290	✓
Burger King	185	
Starbucks	146	
<b>TOTAL</b>	<b>6,106</b>	
Kiosks as proportion of POS devices		<1%

The Market Database provides comprehensive market and vendor data by country, including installed base, shipments and screen size segment

GLOBAL SELF-ORDERING KIOSKS 2020									
Self-Ordering Kiosks Installed Base - by Vendor, Region and Country, June 2019 (Screen Sizes Above 30")									
Confidential - Internal Use Only									
Region	Country	Total	Acrelec	Applied	CITIZEN Solutions	Coates	Diebold Nixdorf	Elo	Evoke
Asia-Pacific	Australia								
Asia-Pacific	China	X,XXX							
Asia-Pacific	India	X,XXX							
Asia-Pacific	Japan	X					X		
Asia-Pacific	Philippines	X	XX						
Asia-Pacific	South Korea	X,XXX			XXX	XXX			
Asia-Pacific	Total	X,XXX	X,XXX		XXX	XXX	X		
Americas	Brazil	X,XXX	X,XXX				X		
Americas	Canada	X,XXX					X,XXX		
Americas	Mexico	XX	XX						

# Appendix

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## RBR has three decades' experience as a provider of premium market research on consumer self-service technologies

### Key Qualifications

- ▶ 30 years' experience delivering international market research to diverse blue-chip client base
- ▶ Expertise in hardware, software and services
- ▶ Pre-eminent global expert in consumer self-service technologies; annual worldwide studies of ATMs (first covered in 1983) and self-checkout (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, Fiserv, Fujitsu, GK Software, HP, IBM, Mastercard, Microsoft, NCR, PayPal, Toshiba, Visa, Zebra

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

**Investment banks and investors** e.g. Advent International, Bain Capital, Goldman Sachs, Morgan Stanley, Oaktree Capital, Temasek

## The study covers dedicated kiosk hardware offering full order entry and payment functionality

Product Scope		
Dimension	Included	Excluded
Purpose	<ul style="list-style-type: none"> <li>▶ Ordering of food and/or beverages for separate fulfilment</li> </ul>	<ul style="list-style-type: none"> <li>▶ Vending kiosks directly fulfilling food, beverages etc.</li> </ul>
Format	<ul style="list-style-type: none"> <li>▶ Quick-service and fast-casual restaurants*</li> <li>▶ For eat-in/take-out or drive-through orders</li> </ul>	<ul style="list-style-type: none"> <li>▶ Table service restaurants</li> <li>▶ Non-foodservice deployment</li> </ul>
Capabilities	<ul style="list-style-type: none"> <li>▶ Fully self-service ordering including selection and payment<sup>‡</sup></li> </ul>	<ul style="list-style-type: none"> <li>▶ Lacking payment functionality</li> <li>▶ Requiring systematic employee assistance</li> </ul>

\* And other counter-service formats e.g. food courts

‡ At least one payment type (e.g. card/mobile) must be possible in a fully self-service transaction, even if other payment options (e.g. cash) are possible with employee assistance