

London, 17th February 2020

Quick-service restaurants rush to introduce self-ordering kiosks

The market for self-ordering kiosks is booming, as restaurant operators seek to meet consumer demand for self-service

McDonald's accounts for more than half of installations

Self-ordering kiosks are a key component in enabling customers to take control of their dining experience. As of June 2019, there were 135,000 installations globally, according to *Global Self-Ordering Kiosks 2020*, a brand new study by strategic research and consulting firm RBR.

The first in-depth global study on this topic found that McDonald's is by far the world's largest operator of self-ordering kiosks, with nearly 70,000 units installed. Other global QSR chains are following suit, with Burger King and KFC having made progress in selected countries.

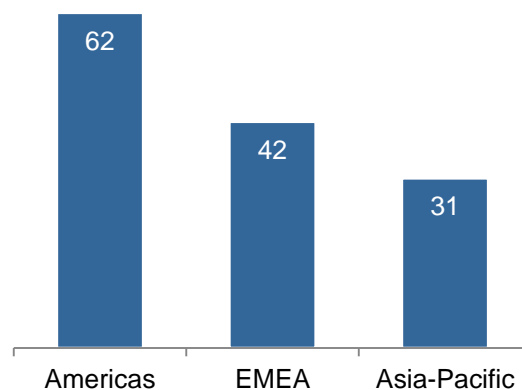
The USA is the largest market for the technology, which allows fully self-service ordering including selection and payment, with around 40% of worldwide installations. Alongside global giants, domestic chains have also introduced kiosks, with Panera Bread using a tablet-based solution since 2012.

Restaurant operators across Europe and Asia ramp up kiosk roll-outs

Self-ordering kiosks are also well-established in Europe, with the UK and France the largest markets. The latter has been at the forefront of kiosk deployment in the fast food sector; local brand Quick installed its first terminals in a Paris restaurant in 2004.

Asia is more of a mixed picture, with mainly global QSR chains leading deployment in China. In other countries, such as South Korea and the Philippines, it is local operators that have invested most in the technology.

Self-Ordering Kiosk Installed Base, June 2019, by Region (000s)



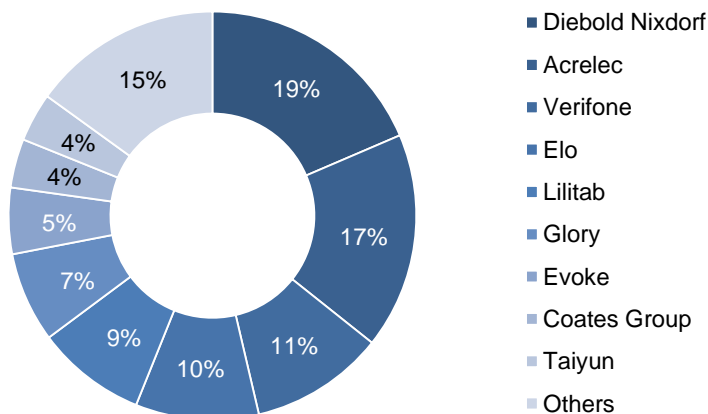
Source: *Global Self-Ordering Kiosks 2020* (RBR)

Diebold Nixdorf and Acrelec are the largest self-ordering kiosk suppliers

US technology firm Diebold Nixdorf is the largest self-ordering kiosk supplier in the world, with 19% of installations. The company's biggest customer is McDonald's, installing 25,000 of its terminals. In second place is France's Acrelec, in which Japanese cash technology specialist Glory recently acquired an 80% stake.

US payments firm Verifone is the third largest supplier, thanks to its acquisition of kiosk supplier Zivelo in summer 2019. Fellow American companies Elo and Lilitab round out the top five vendors. Other major self-ordering kiosk suppliers include Evoke from the UK, Australia's Coates Group and Chinese vendor Taiyun, all of which count McDonald's as a customer in their home markets.

Suppliers' Shares of Self-Ordering Kiosks Installations Worldwide, June 2019



Source: *Global Self-Ordering Kiosks 2020 (RBR)*

Customer demand and competitive pressures driving growth

The global self-ordering kiosk market is growing rapidly, with more than 40,000 terminals shipped in the year to June 2019, as McDonald's ramped up its US deployments and Taco Bell rolled out kiosks at its outlets. Penetration of the technology is expected to increase, with competitive pressures encouraging smaller chains and independents to follow the lead of the global fast food giants.

Alan Burt, who led RBR's research, commented: *"Demand for self-ordering kiosks will remain high in coming years; this win-win technology fulfils consumers' expectations of a quick and easy dining experience while allowing restaurant operators to reduce costs and increase ticket size"*.

Notes to editors

These figures and insights are based on RBR's *Global Self-Ordering Kiosks 2020* report, the first dedicated study of this fast-growing market. It delivers deep market insights, providing global analysis drawing upon figures for 22 country markets. For more information about this report or to discuss the findings in more detail please email Alan Burt (alan.burt@rbrlondon.com) or call +44 20 8831 7322.

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