








2021

KIOSK MARKETPLACE

CENSUS REPORT



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EXECUTIVE SUMMARY

Executive Summary

The year 2020 will go down in history as the year the COVID-19 pandemic wreaked havoc on the world's health and economies. The self-service kiosk industry, however, will remember it more as a year of innovation – a year when self-service technology providers introduced a deluge of tools to enable users to interact with devices more safely.



Elliot Maras,
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Much of the new technology – such as touchless transaction and biometric identity verification – had already been introduced but found more relevance during COVID-19-imposed quarantines. From the moment business lockdowns began in March 2020, self-service equipment providers began addressing the demand for products to help protect people from the highly contagious disease.

Innovation flourished, as demonstrated by the continuous march of product announcements in Kiosk Marketplace but not without growing pains. In response to quarantines, businesses and organizations worldwide pulled the plug on devices as people remained in their homes.

Business trips

Last year, following three consecutive years of double-digit growth, was the first time the self-serve kiosk industry did not post a revenue gain in the four years Kiosk Marketplace has published its annual Census Report.

Product introductions accelerated, and new players by the hundreds entered the market, but the economic setback left no industry unscathed.

Global sales of interactive kiosks – not counting ATMs and refreshment and amusement vending machines – totaled an estimated \$10.6 billion in 2020, just shy of the \$11.9 billion in 2019.

The survey's mission

The Kiosk Marketplace Census presents statistics on the self-service kiosk industry's size, operating metrics and outlook.

The census holds the distinction of offering statistical information provided by both user organizations and suppliers of self-serve kiosks. Where other kiosk market studies mostly offer supplier- provided information, much of the information in the Kiosk Marketplace Census is user provided.

Most statistics in this report are based on online questionnaires filled out by Kiosk Marketplace readers in November and December of 2020. Readers were asked to provide information about their number of installations, plans for future deployments, business mix, investment in research and development, operating costs, kiosk content strategy, return on investment, sales methodology, outlook on technology, level of optimism and perceived challenges.

The charts and much of the commentary in this year's report are based on more than 172 completed questionnaires. Some of the commentary is also based on interviews with Kiosk Marketplace readers.

What the report measures

The report measures the growth of free-standing, self-service devices but does not include ATMs or refreshment and amusement vending machines.

While interactive kiosks use some of the same components and technologies as ATMs and vending machines, the latter two equipment types are operated by companies using business models specific to those two industries. Kiosk Marketplace considers the ATM, refreshment vending and amusement vending industries separate from the interactive kiosk industry.

When vending machines are used to mainly dispense non-food items, such as PPE products, gifts or apparel items, they are classified as self-serve kiosks.

The report is divided into five reader segments:

1. User organizations that host kiosks (retailers, consumer brands, governments, restaurants, gaming establishments and transportation services).
2. Kiosk hardware manufacturers.
3. Kiosk software manufacturers.
4. Value-added kiosk resellers.
5. Kiosk hardware component manufacturers.

Growing pains

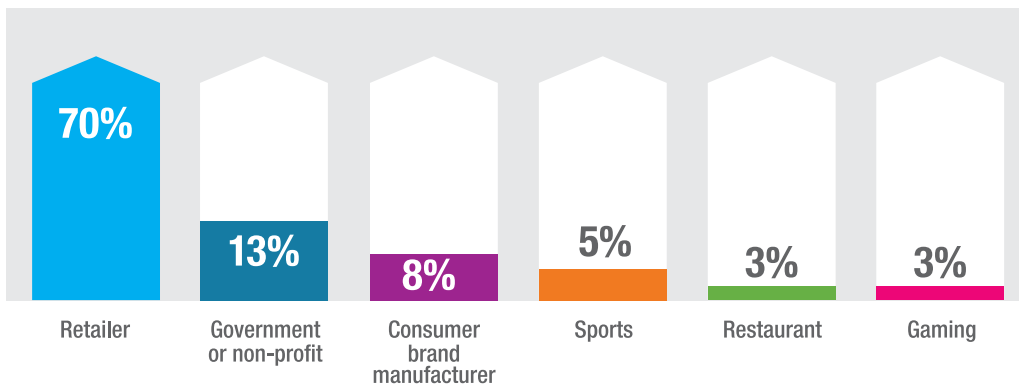
Retailers, the largest customer base of self-service providers, closed stores in 2020 by the hundreds of thousands as governments worldwide invoked quarantines to contain the virus. The closures, which varied in length by geography, halted service and deployments in the second quarter. As lockdowns lifted in the third quarter, many businesses restricted their operations and consumers limited their shopping activity to minimize exposure to pathogens.

The safety measures boosted the demand for self service in general, but business closures and restrictions put buying of goods and services on hold. When lockdowns lifted in the third

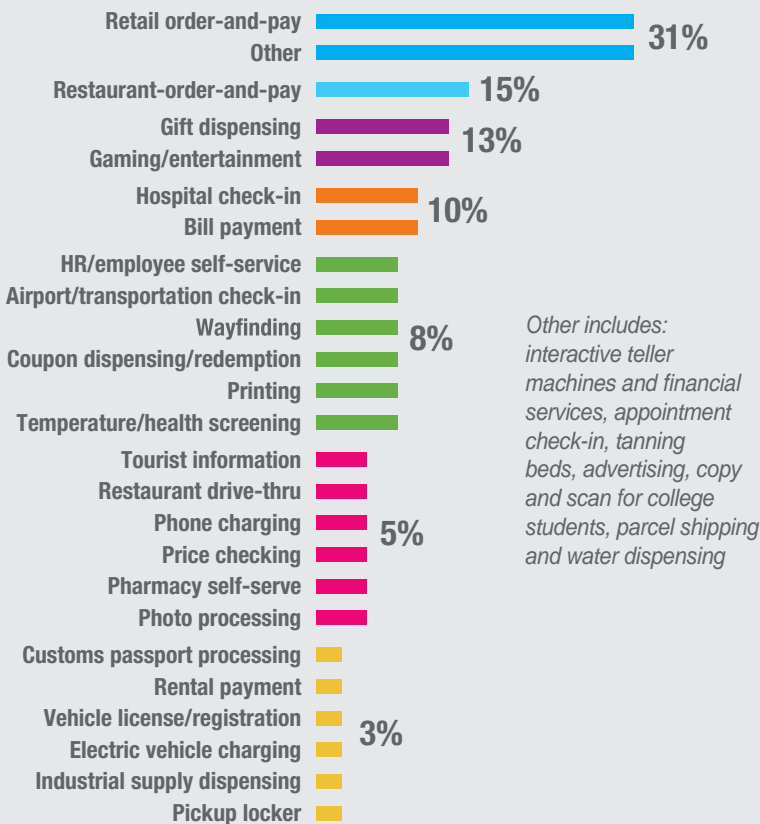
Retailers, locations and consumer brands that have kiosks

2. Which best describes your organization type?

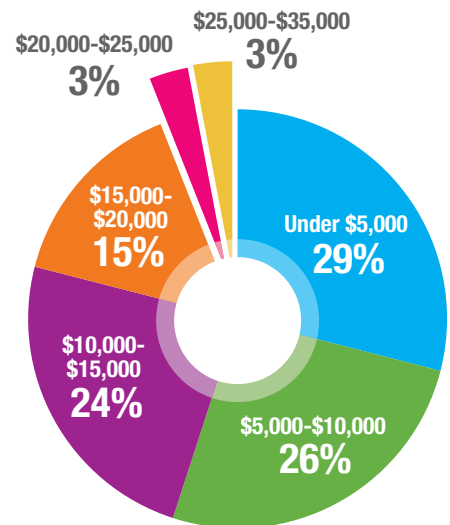
(Note: total does not equal 100 due to rounding)



3. From the list below, which type of kiosks do you operate?

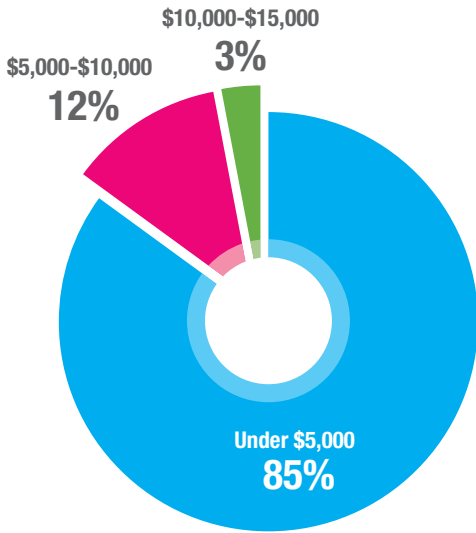


4. Average cost for deploying one of these kiosks:

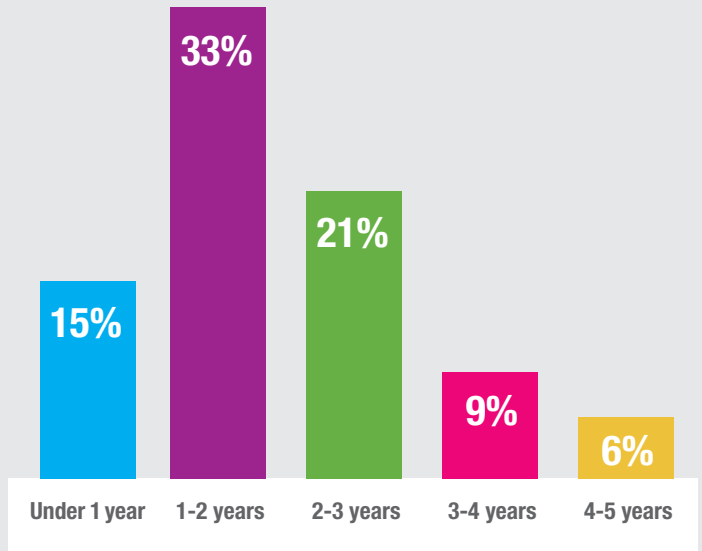


Retailers, locations and consumer brands that have kiosks

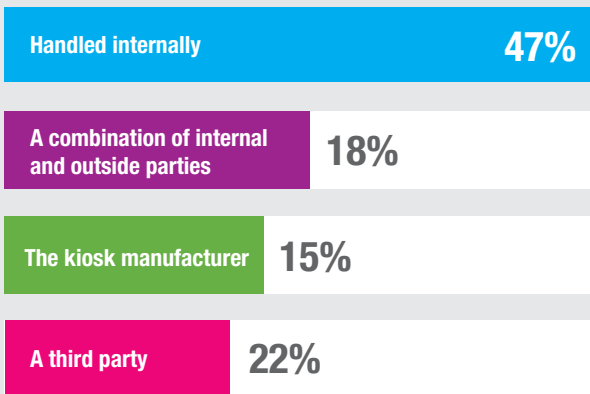
5. Average yearly cost for maintaining one of these kiosks (including labor):



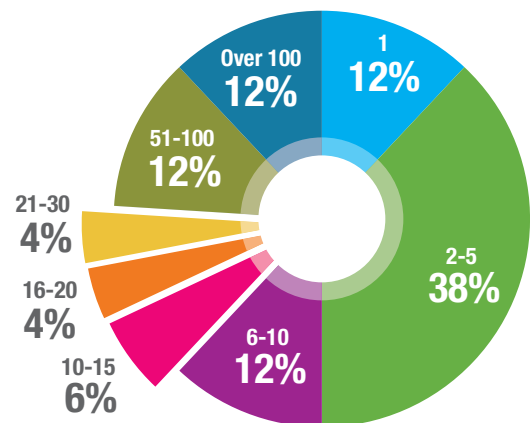
6. Average number of years for recovering the investment for one of these kiosks:



7. Who services and maintains the kiosks you operate?



8. How many of your locations operate kiosks?



How new protocols supported by technology will keep us safe

Recently, terrific news has been released by several national governments, pharmaceutical companies and infectious disease experts — vaccines to protect people from COVID-19 have been developed and are in the early stages of being distributed. There is every reason to celebrate the triumph of modern science over a highly infectious virus. However, it does not mean we can let our guards down. Frankly, we may never be able to return to the more relaxed sanitary standards we practiced just a year ago inside places like public buildings, businesses, hotels and medical centers.

Though mask mandates will most likely fade away in 2021, it is important to remember that the “19” in COVID-19 represents that this particular coronavirus was first discovered in 2019. Put another way, COVIDs (or COrona Vlrus Diseases) are discovered frequently enough that they require numbering to distinguish them from each other. As of today, it is unknown if the vaccines that have been developed are of the permanent variety like the one developed to eradicate polio, or if populations will be protected only for a short while and require an annual shot much like the one offered every year to protect against influenza.

Similar to travel protocols

In the immediate days and months following 9/11, the security procedures that were enacted to prevent future attacks were highly manual and unfortunately reliant upon old technology, like X-ray machines and metal detectors, to identify threats for which they were ill equipped. For this reason, during the early 2000s, wait times to get through security in an airport were often measured in hours.



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