



2023

KIOSK MARKETPLACE
CENSUS REPORT

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EXECUTIVE SUMMARY

The self-serve kiosk industry pushed forward in a big way in 2022, as the recovery from the pandemic continued for the second straight year. A convergence of factors took hold: rising consumer acceptance of self service, a recovering supply chain, a growing labor shortage, improving technology, and the return of industry trade shows.

Recovery actually began in 2020 when technology providers responded to the coronavirus pandemic with solutions to provide touchless transactions and social distancing. In 2021, businesses and organizations reopened, setting the stage for an economic recovery that allowed the self-serve kiosk industry to resume its pre-pandemic, double-digit growth curve.

In 2022, the recovery gained momentum, delivering \$14.52 billion in global sales of interactive kiosks, not counting ATMs and refreshment vending machines, a 20% gain over the \$12.1 billion in 2021, and a 6-point increase over the prior one-year gain, according to the 2023 Kiosk Marketplace Census.

The self-serve kiosk industry largely rides the e-commerce explosion driven by the pandemic, which is expected to continue for at least the next few years.

The survey's mission

The Kiosk Marketplace Census provides statistics on the self-serve kiosk industry's size, operating metrics and outlook. The report holds the distinction of providing statistical information gathered from both user organizations and suppliers of self-serve kiosks. Where other kiosk market studies provide supplier-based



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information, most of the Kiosk Marketplace Census is user organization provided.

Most of the data is based on online questionnaires filled out by Kiosk Marketplace readers in November and December of 2022. Readers were queried about their number of installations, business mix, operating costs, return on investment, plans for future deployments, investment in research and development, sales methodology, kiosk content strategy, outlook on technology, level of optimism and expected challenges.

The charts and much of the commentary are based on input from nearly 300 questionnaires. Some of the commentary is also based on phone and in-person interviews with Kiosk Marketplace readers.

What the report measures

The industry census measures the growth of free-standing, point-of-sale, self-serve kiosks, which are defined as follows:

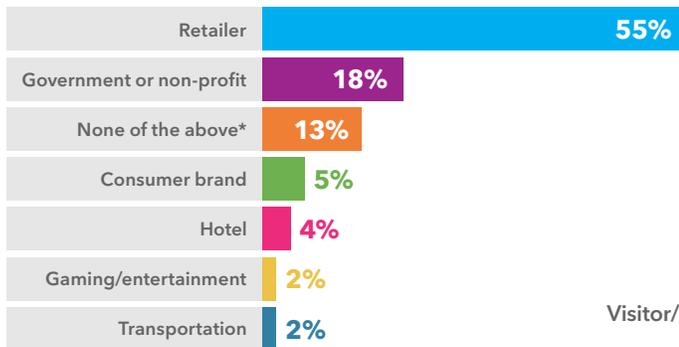
"An interactive, self-serve device provided by a venue, not the user, that helps the user do something that is informational and/or transactional that streamlines, automates or eliminates wait or cost."

The census does not measure the growth of bank ATMs or refreshment vending machines. Kiosk Marketplace

Retailers, locations and consumer brands that have kiosks

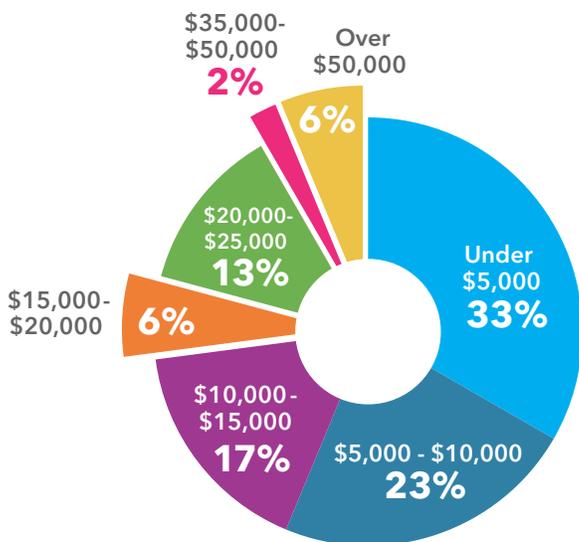
2. Which best describes your organization type?

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



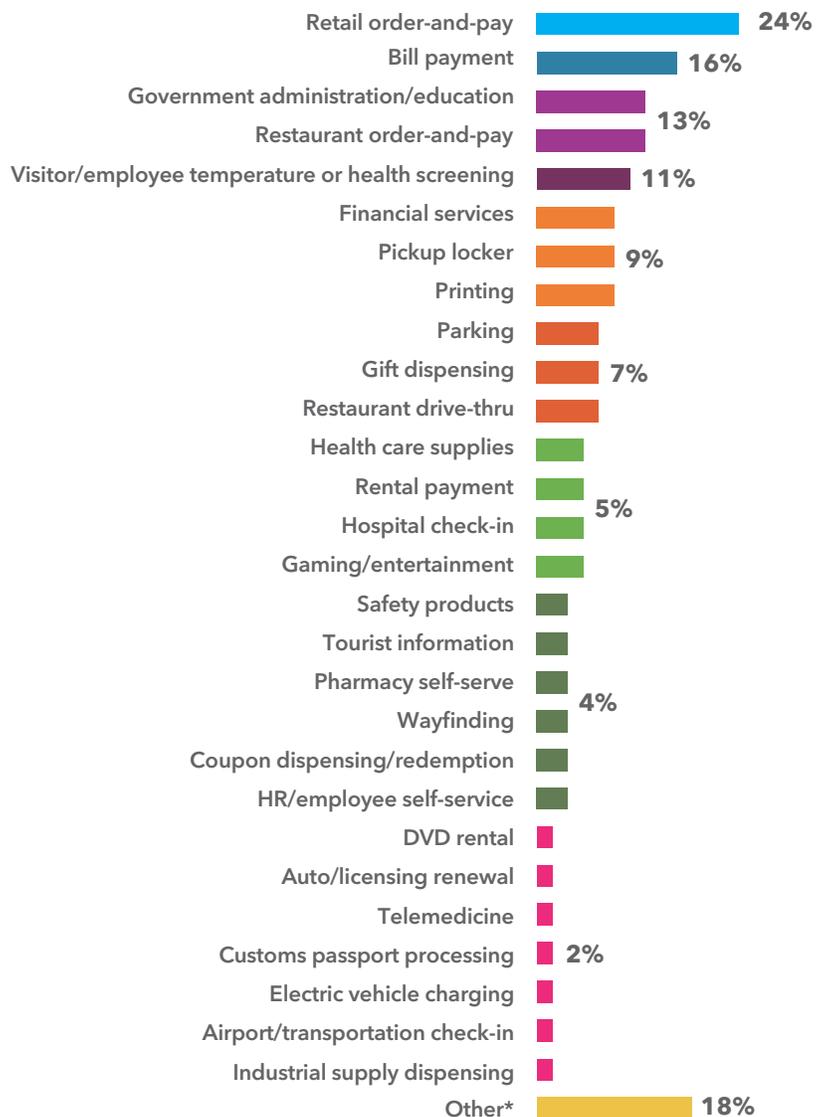
(*None of the above includes financial, lodging, utilities, multi-family residential, manufacturing and storage facilities.)

4. Average cost for deploying one of these kiosks:



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

*Other includes: interactive teller machines, appointment check-in, tanning beds, advertising, copy and scan for college students, parcel shipping and water dispensing.)



INDUSTRY INSIGHTS

Emergent verticals for self-service kiosks

Self-service technology isn't new.

In fact, McDonald's began testing ordering kiosks in the QSR space as far back as 2003, while "common user self-service," or CUSS terminals, rolled out to airports worldwide soon after.

What is new, however, is seeing kiosk programs expand into unique markets that are quickly recognizing the value self-service offers.

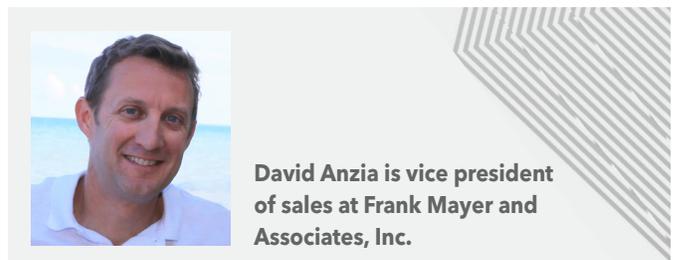
Now, instead of only encountering kiosks at their favorite fast-food restaurants and the airport, users are engaging with them at doctors' offices, sports stadiums, dispensaries and more.

In the next year, verticals like healthcare, specialized foodservice, cannabis and the public sector will continue to adopt self-service kiosks as tools to streamline operations while still providing exceptional customer service.

Healthcare

It's no secret businesses are struggling with labor shortages, and the healthcare industry is no exception. According to the AON 2022 Benefits Survey of Hospitals, organizations reported a 66% higher turnover in non-clinical positions over the last 12 months.

Many are turning to technology like self-service kiosks to fill the gap, giving patients control over their check-in experience and reallocating current staff to other tasks.



David Anzia is vice president of sales at Frank Mayer and Associates, Inc.

While enhancing patient check-in and easing the burden on limited reception staff is a main motivator behind employing kiosks, hospitals, clinics and healthcare businesses are also utilizing self-service technology to address other pain points.

Telemedicine is one. Let's Talk Interactive, a telehealth solutions provider, offers easy access to medical care through virtual visits on kiosks. Use case scenarios include settings that benefit from remote health services, like schools, jails, nursing homes and more.

In addition to telemedicine, healthcare facilities are deploying kiosks to provide campus wayfinding, patient bill payment and vendor check-in capabilities, too.

With kiosks filling a variety of needs in healthcare, expect to see continued growth of self-service technology in this field.

Foodservice

Quick service restaurants have been on the forefront of using self-service tools like kiosks and mobile apps for years. This easy adoption by big industry players paved the