



Percentage **INCREASE** in customers' food and beverage orders when they use self-service kiosks



**\$717
MILLION**



MARKET CAP of the U.S. interactive kiosk market in 2016

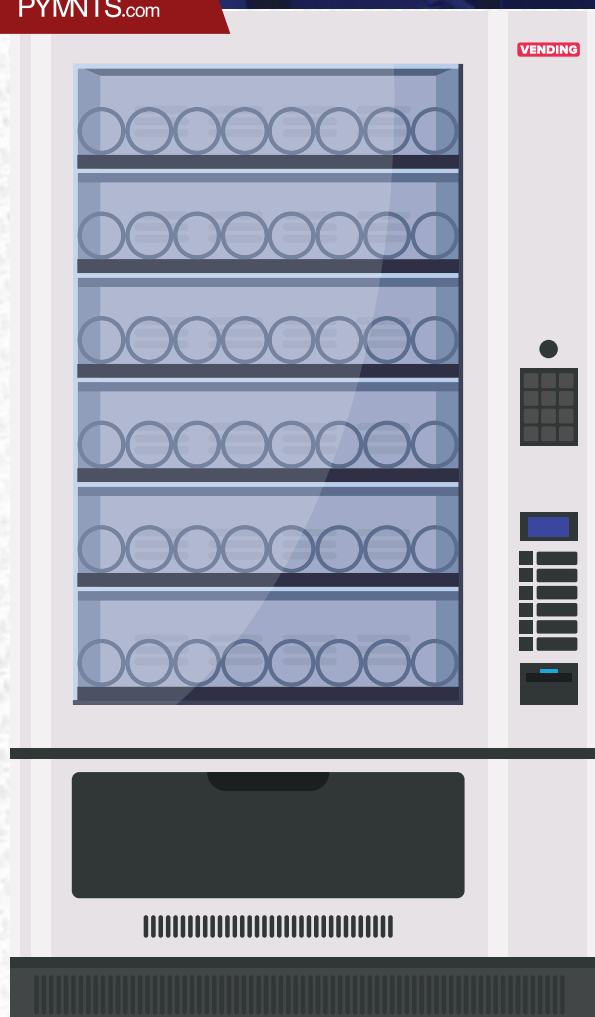


The food and beverage segment grew by 8.4 percent between 2013 and 2016. It is expected to grow by 7.2 percent over the next three years, **REACHING \$310 MILLION IN MARKET VALUE BY 2021.**

KIOSK & RETAIL | REPORT

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**FOOD &
BEVERAGE
EDITION**



Kiosks for food and beverage represent **MORE THAN 30 PERCENT** of the U.S. market, making it the largest kiosk category.



Revenue from "intelligent vending machines" is expected to reach **NEARLY \$12 BILLION** by 2025.

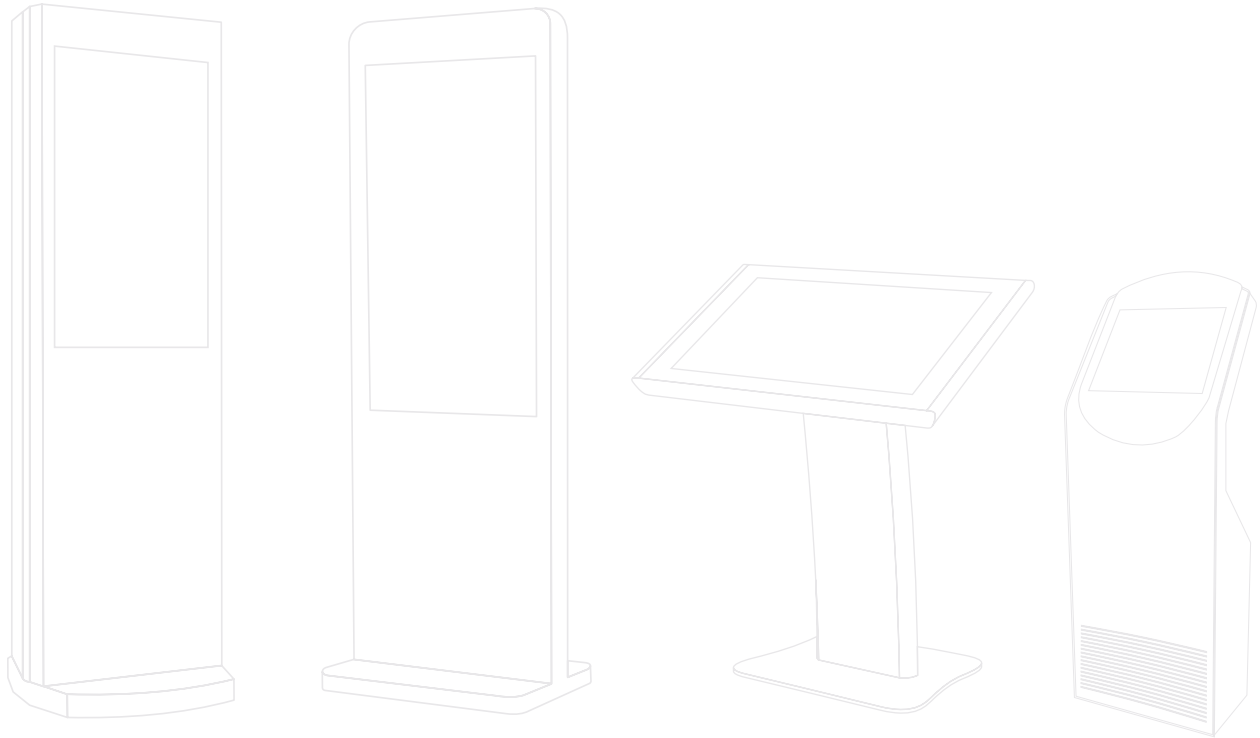


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ACKNOWLEDGMENT

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INTRODUCTION

SUMMARY STATISTIC

- The United States interactive kiosk market was worth \$717 million in 2016.¹
- Kiosks for food and beverage represent more than 30 percent of the U.S. market, making it the largest kiosk category.²
- The food and beverage segment grew by 8.4 percent between 2013 and 2016, and it's expected to grow by 7.2 percent over the next three years to reach \$310 million in 2021.³
- Shipments of food and beverage kiosks to the U.S. grew by 11 percent between 2013 and 2016, when more than 2 million units were shipped.⁴
- One study has found fast food customers spend 30 percent more when ordering through self-service kiosks.⁵
- Revenue from "intelligent vending machines" is expected to reach nearly \$12 billion by 2025, according to a study.⁶

It seems humans have dreamed of delicious meals conjured at the push of a button for about as long as they've imagined a technology-enhanced future. Picture, if you will, *The Jetsons'* Foodarackacycle producing a steaming platter of beef stroganoff in an instant. Reality has so far fallen far short of this fantasy, however, with vending machines that instead eat our quarters and cling to candy bars with a grip no amount of fist pounding can dislodge.

It could very well be that we're turning a corner on the path to an automated food utopia, though. The lowly vending machine has gone high-tech in recent years, and food and beverage kiosks can now serve up far more than soda and junk food. Not only do they dispense a dizzying array of products — including fresh-squeezed juice and even marijuana — they can also be used to order food at restaurants and other venues, bypassing the need to wait in long lines or get the attention of a distracted waiter. These devices employ cutting-edge connected technology to

make the food and drink purchasing process more efficient, personalized and profitable.

Self-service kiosks are becoming increasingly common, popping up at train stations, stadiums and even in clothing stores. They've been closely associated with the provision of drinks, food and candy since the early days of the gumball machine, and the food and beverage sector continues to dominate the market in the U.S., despite the rise of new kiosks forms. Perhaps that's not a surprise in a country that gave the world innovations in dining efficiency like fast food and the drive-through.

The U.S. food and beverage self-service kiosk markets totaled \$117 million and \$101 million in 2016, respectively, exceeding the next largest categories of check-in (\$79 million) and ticketing kiosks (\$70 million). Together, food and beverage kiosks make up more than 30 percent of a segment which has been subdivided into 14 categories.⁷

¹ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

² USA interactive kiosk market. (2017). BisReport Electronic Research Center.

³ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

⁴ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

⁵ Fishman, Charles. The toll of a new machine. Fast Company. 2005. <https://www.fastcompany.com/49359/toll-new-machine>. Accessed April 2018.

⁶ Author unknown. Intelligent vending machines market size worth \$11.84 billion by 2025. Grandview Research. 2016. <https://www.grandviewresearch.com/industry-analysis/intelligent-vending-machines-industry>. Accessed April 2018.



Even more notable is that the food and beverage kiosk markets have continued to post solid annual growth, despite their already dominant positions, and are expected to continue to do so over the next few years. Kiosk shipments have grown annually by more than 10 percent, and are expected to increase annually by 7 to 8 percent in the coming years.⁸

Some of the more prominent supporters of food and beverage kiosks have included companies such as USA Technologies (USAT) and eTouchMenu. USAT, in particular, has branched into an assortment of different kiosk markets, including self-service parking, commercial laundromats, retail, and amusement games, bringing its Internet of Things payment solutions systems to the food and beverage vending market as part of its broader commitment to digitize the cash-based world of self-service kiosks.

One force driving self-service kiosk orders, particularly in the quick-service restaurant (QSR) sector, is the desire to cut labor costs amid a campaign to boost minimum wage. As with any disruptive technology, concerns abound that self-service kiosks could put thousands of restaurant employees out of work. Use has also corresponded with larger food orders, and some speculate that removing “social friction” from a transaction might make consumers more inclined to super-size their meals. Regardless of these issues, it’s likely that self-service kiosks will continue their march into public spaces — so long as that age-old desire to satisfy our appetites with the push of a button persists.

⁷ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

⁸ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

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THE DATA

BEHIND THE INDUSTRY

INDUSTRY DATA

As shown in Table 1, self-service food and beverage kiosks represented 30 percent of the total U.S. kiosk market in 2016, accounting for some \$218 million. With a compound annual growth rate (CAGR) of 7.2 percent, that total is expected to reach \$309.61 million by 2021. Separating the beverage and food segments, the latter was worth \$117.22 million in 2016, representing a 16 percent market share and up from \$92.06 million in 2013 — a growth rate of 8.3 percent. Shipments totaled 1.2 million units in 2016, growing at an average annual rate of 11.2 percent since 2013, when 865,000 units were shipped. The food kiosk segment is projected to grow to a market value of \$174.77 million in 2021.

Table 1. Kiosk market segmentation (product type level): market size (in million dollars) 2013-2016⁹

VALUE (MILLION USD)	2013	2014	2015	2016
Food self-service kiosks	92.06	99.72	107.71	117.22
Beverage self-service kiosks	78.67	84.68	91.48	100.81
Subtotal	170.73	184.40	199.19	218.03
Photo kiosks	13.35	14.39	15.65	17.91
Ticketing kiosks	49.76	56.26	63.62	69.98
Electronic product charging kiosks	4.16	4.80	5.50	5.95
Clothing retail kiosks	1.65	1.87	2.13	2.15
Other non-food and beverage retail kiosks	5.55	6.32	7.05	8.10
Parking kiosks	29.23	30.70	33.55	36.35
Electric vehicle charging kiosks	2.56	3.45	4.72	5.66
Patient interactive kiosks	42.30	47.06	54.43	62.53
Information kiosks	50.84	54.14	58.37	63.27
Employment kiosks	27.84	29.59	32.39	35.85
Airport check-in kiosks	59.79	65.21	71.31	78.72
Automated teller machines (ATMs)	22.13	24.15	26.25	29.32
Other	53.46	62.49	72.35	83.14
Total	533.35	584.83	646.51	716.96
Share of food & beverage market	32%	31%	30%	30%

⁹ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

Table 2. Kiosk market segmentation (product type level): share of shipments volume 2013-2016¹⁰

SHIPMENT VOLUME (K UNITS)	2013	2014	2015	2016
Food self-service kiosks	865.02	959.60	1059.57	1192.02
Beverage self-service kiosks	644.36	704.14	783.57	889.26
Subtotal	1509.38	1663.74	1843.14	2081.28
Photo kiosks	92.71	92.64	110.30	133.83
Ticketing kiosks	377.97	429.97	487.70	551.40
Electronic product charging kiosks	36.08	44.45	50.18	54.72
Clothing retail kiosks	13.84	16.38	17.77	20.82
Other non-food and beverage retail kiosks	41.53	48.19	54.89	66.03
Parking kiosks	222.76	238.61	265.55	295.63
Electric vehicle charging kiosks	17.62	25.26	35.55	44.61
Patient interactive kiosks	286.94	350.53	398.32	454.44
Information kiosks	336.02	339.21	392.57	473.48
Employment kiosks	215.21	234.40	257.18	290.27
Airport check-in kiosks	466.49	517.37	573.43	648.95
Automated teller machines (ATMs)	156.06	172.18	185.57	207.00
Other	422.44	505.77	555.14	625.75
Total	4195.05	4678.70	5227.29	5948.21
Share of food & beverage market	35%	35%	35%	34%

¹⁰ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

As shown in Table 2, shipments of food and beverage kiosks reached 2.08 million units in 2016 and represented 35 percent of the total shipped kiosks volume. That volume has grown by 11 percent annually since 2013.

The beverage self-service kiosks market reached \$100.81 million in 2016 — up from \$78.67 million in 2013 at an annual growth rate of 8.6 percent — and represented 14 percent of the overall kiosk market in 2016. Shipment volumes grew by 11.3 percent annually, from 644,360 units in 2013 to 889,260 in 2016, representing 12.5 percent of total kiosk market shipments.

Table 3. Kiosk market segmentation (industry level): market value 2013-2016¹¹

VALUE (MILLION USD)	2013	2014	2015	2016
Retail	167.11	180.76	196.01	196.53
Airway transport	9.44	10.47	11.77	13.55
Roadway transport	16.64	18.42	20.82	23.52
Railway	34.08	36.26	40.21	40.87
Government	39.10	42.46	47.07	51.48
Banking and finance	26.46	29.07	31.42	34.56
Entertainment	86.72	93.58	100.86	122.17
Healthcare	30.08	32.05	34.72	41.23
Hospital management	30.14	34.68	40.41	44.52
Medicines	17.92	20.59	23.60	27.89
Medical reports	15.25	16.84	19.01	21.15
Other	60.43	69.65	80.62	99.52
Total	533.37	584.83	646.52	716.99
Retail share	31.33%	30.91%	30.32%	27.41%

¹¹ USA interactive kiosk market. (2017). BisReport Electronic Research Center.

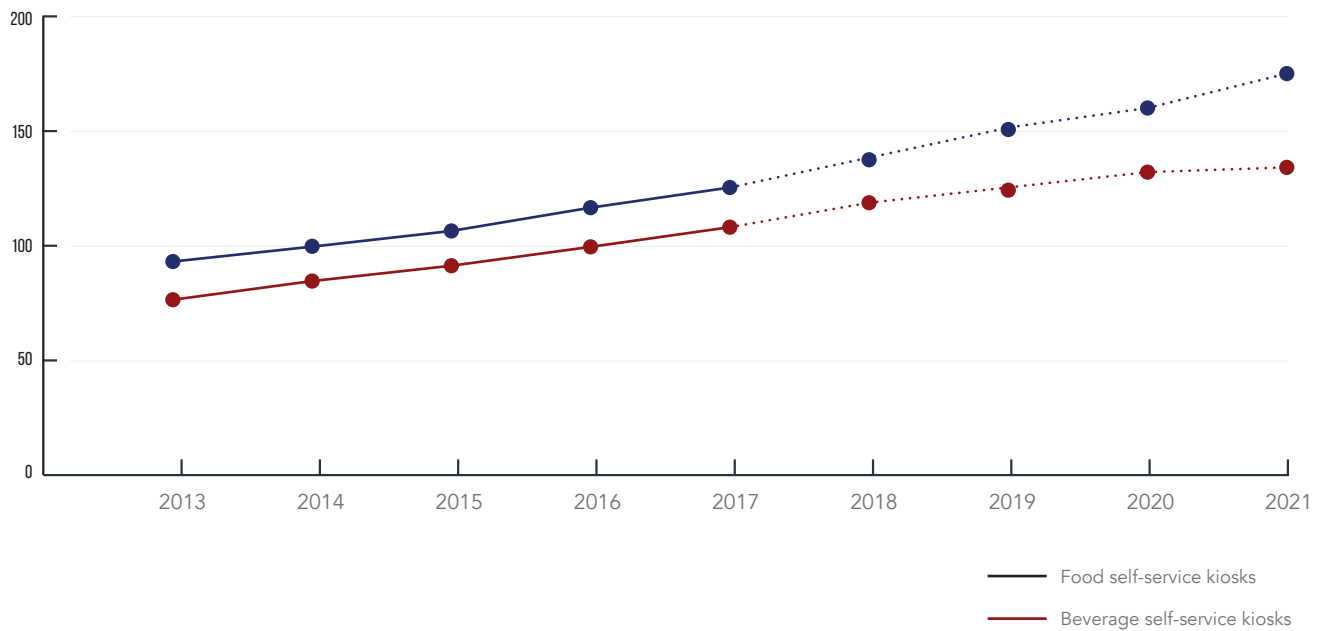
Table 4. Kiosk market segmentation (industry level): market size 2013-2016¹²

SHIPMENT VOLUME (K UNITS)	2013	2014	2015	2016
Retail	1479.17	1629.12	1762.11	1959.94
Airway transport	57.89	66.44	75.80	86.84
Roadway transport	119.98	138.96	164.66	201.05
Railway	302.46	326.57	365.39	378.31
Government	265.55	287.74	326.70	359.87
Banking and finance	190.87	209.61	230.52	259.34
Entertainment	665.40	758.57	882.67	1007.45
Healthcare	218.98	244.70	265.55	303.95
Hospital management	203.04	219.43	261.36	314.07
Medicines	136.76	161.42	187.14	222.46
Medical reports	94.81	102.46	106.64	118.96
Other	460.13	533.69	598.74	735.97
Total	4195.04	4678.71	5227.28	5948.21
Retail share	35.26%	34.82%	33.71%	32.95%

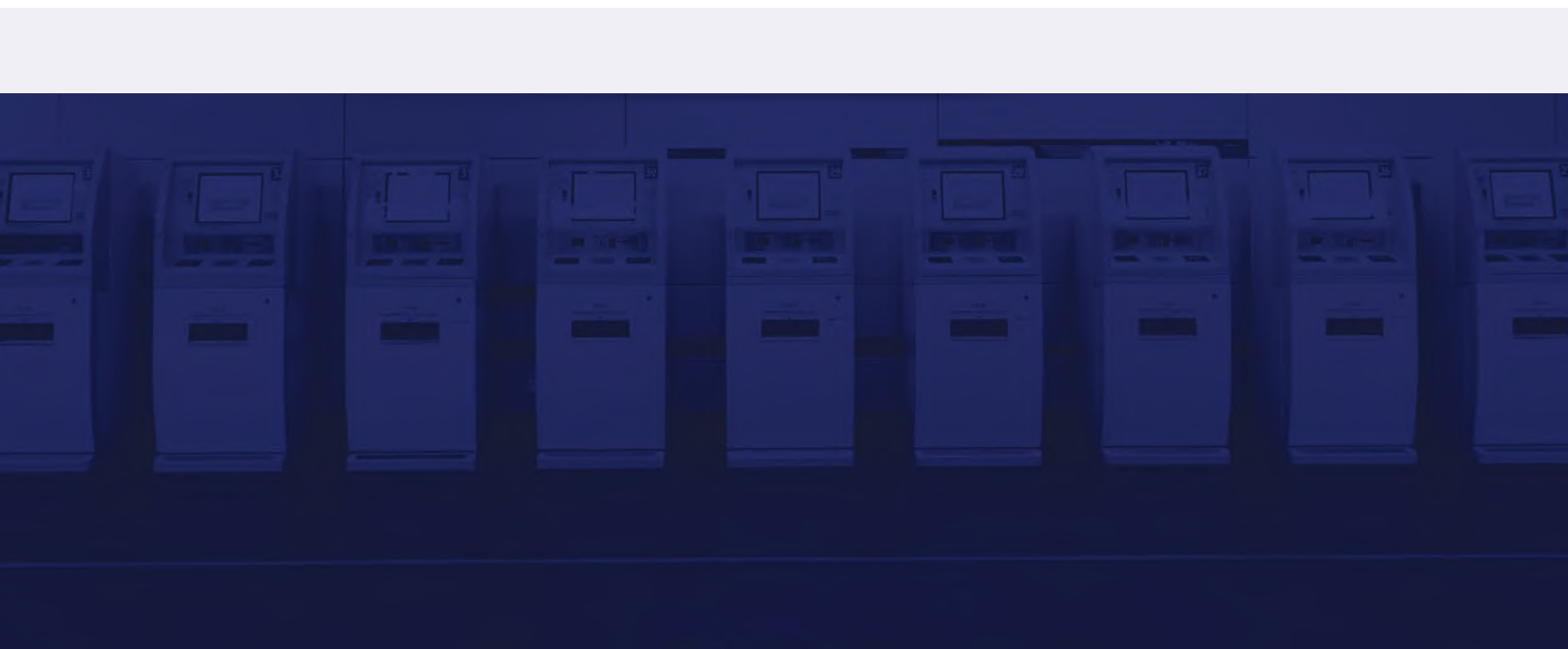
¹² USA interactive kiosk market. (2017). BisReport Electronic Research Center.

In the future, the food self-service kiosk market is expected to grow by 8 percent to \$174.77 million by 2021, and beverage self-service kiosks are expected to grow at 7 percent to \$134.84 million in the same timeframe, as shown in Figure 1.

Figure 1. Actual and projected value in millions 2013-2021¹³



¹³ USA interactive kiosk market. (2017). BisReport Electronic Research Center.





THE EVOLUTION OF THE VENDING MACHINE

Retail kiosks being shipped today have come a long, long way. By some accounts, the first machine to offer a product without requiring a human intermediary dates to around 10 A.D., when Greek mathematician and engineer Heron of Alexandria invented a device that dispensed holy water inside Egyptian temples.¹⁴

The modern vending era began in the 1880s, however, with coin-operated devices that sold envelopes and stationery in London. The first gum-dispensing stations were installed on subway platforms in New York City, followed by the beloved gumball machine soon thereafter. Paris, France, gets credit for introducing the first machines that sold beer, wine and liquor.¹⁵ The marriage of vending machine and beverage would prove a lasting one, too, especially with the advent of bottled and canned soda. After all, who could resist the lure of a chilled Coca-Cola on a hot day? Beverages would come to dominate vending machines over the next 100 years.¹⁶

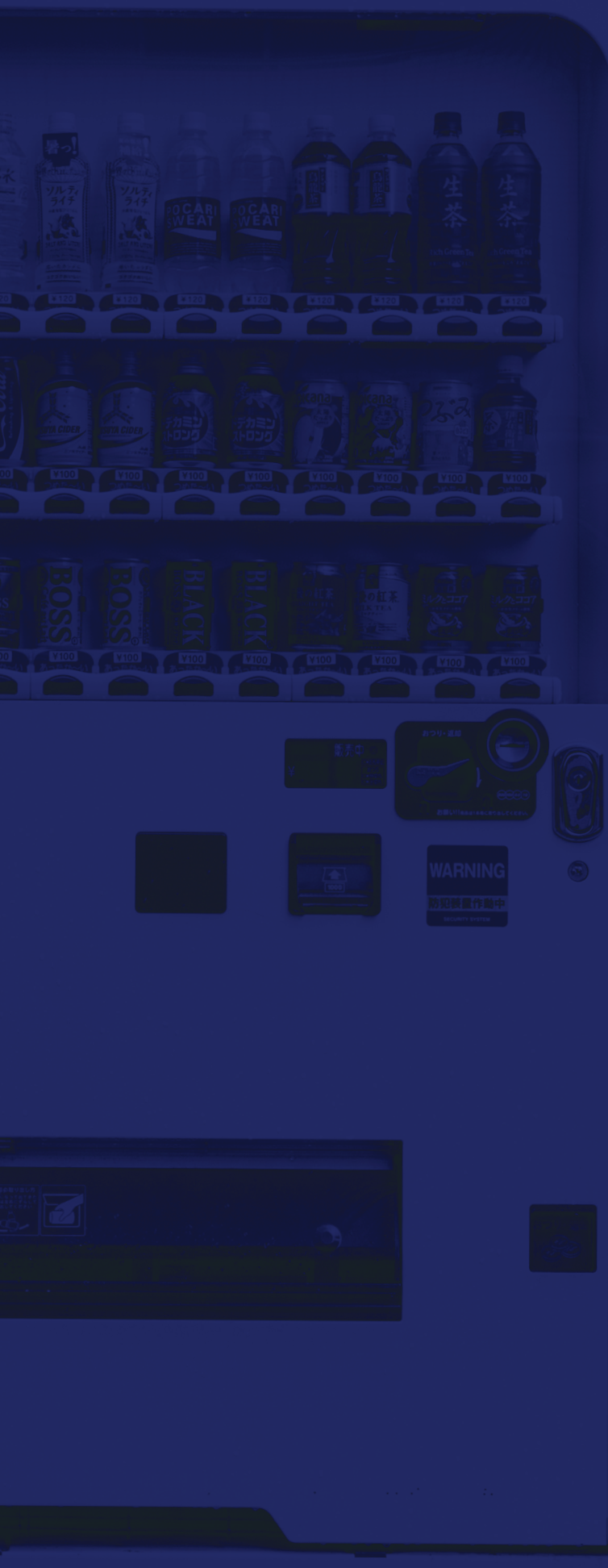
The variety of items available in vending kiosks around the world today seems limited only by imagination and, perhaps, cultural sensitivities. In Japan, the country with the greatest concentration of vending devices in the world, there are machines offering made-to-order ramen and bottles of “flying fish soup” that contain whole fish.¹⁷ One can buy live crabs from vending

¹⁴ Bellis, Mary. The history of vending machines. ThoughtCo. 2017. <https://www.thoughtco.com/the-history-of-vending-machines-1992599>. Accessed April 2018.

¹⁵ Bellis, Mary. The history of vending machines. ThoughtCo. 2017. <https://www.thoughtco.com/the-history-of-vending-machines-1992599>. Accessed April 2018.

¹⁶ Author unknown. A brief history of vending machines. Vending Group. 2017. <http://blog.vendinggroup.com/a-brief-history-of-vending-machines>. Accessed April 2018.

¹⁷ Khalid, Amrita. 12 Japanese vending machines you won't believe exist. The Daily Dot. 2016. <https://www.dailydot.com/unclick/japanese-vending-machines>. Accessed April 2018.



machines in China,¹⁸ and it was only a matter of time after Washington legalized recreational marijuana that bud-dispensing machines appeared in Seattle.¹⁹ One might suspect that traditional vending machines dispensing candy and other munchies would be close by the latter. On the healthier side of the spectrum, some vending machines crank out fresh juice per customer specifications.²⁰

What most distinguishes the new generation of self-service kiosks isn't the products within them, but their high-tech capabilities, including internet connectivity, a range of digital payment processing options and, in some cases, artificial intelligence (AI). Stand-alone kiosks typically feature vast touchscreens with rich graphics and a range of credit card and mobile payment options, and some are being equipped with fingerprint and facial recognition.

A recent study found intelligent vending machine revenue was \$3.4 billion in 2015, and is projected to reach nearly \$12 billion by 2025.²¹ One new machine in the works would function like a giant iPad and be stocked with products ranging from snacks to household goods.²² Amazon has already opened a handful of Amazon Go stores, which function like giant, walk-in kiosks. Customers log in with their mobile phones when they enter, scan products with their phones and are automatically charged when they walk out, without so much as passing a cashier.²³

¹⁸ Guilford, Gwynn. China's newest innovation: live crab vending machines. The Atlantic. 2013. <https://www.theatlantic.com/china/archive/2013/09/chinas-newest-innovation-live-crab-vending-machines/279650/>. Accessed April 2018.

¹⁹ Javier, Lisa. Seattle gets a marijuana vending machine. USA Today. 2015. <https://www.usatoday.com/story/news/2015/02/04/seattle-pot-vending-machine/22817375/>. Accessed April 2018.

²⁰ Garfield, Leanna. This robotic vending machine could replace juice bars. Business Insider. 2016. <http://www.businessinsider.com/juicebot-vending-machine-makes-fresh-juice-2016-6>. Accessed April 2018.

²¹ Author unknown. Intelligent vending machines market size worth \$11.84 billion by 2025. Grandview Research. 2016. <https://www.grandviewresearch.com/industry-analysis/intelligent-vending-machines-industry>. Accessed April 2018.

²² Guse, Clayton. Artificially intelligent vending machines are coming to NYC. Timeout. 2017. <https://www.timeout.com/newyork/blog/artificially-intelligent-vending-machines-are-coming-to-nyc-041717>. Accessed April 2018.

²³ Del Rey, Jason. Amazon plans to open as many as six more cashierless Amazon Go stores this year. Recode. 2018. <https://www.recode.net/2018/2/22/17019274/amazon-go-6-new-stores-seattle-los-angeles-the-grove-rick-caruso-cashierless>. Accessed April 2018.



KIOSKS AND QUICK SERVICE RESTAURANTS



Self-service kiosks are not only capable of furnishing a tangible product, but also of facilitating transactions. QSRs are a natural entry point for the technology, as the sector's customers already place a premium on convenient service. Kiosks allow them to place their orders without the hassle of waiting in a long line or, for that matter, having one's aversion to pickles ignored by the absent-minded kid behind the counter. Typically featuring a large touchscreen, the consoles can be customized with buttons, keyboards, security vaults, card readers and receipt printers. Restaurants are also making use of tablet-based systems, enabling customers to place their orders right from their tables.

McDonald's is a pioneer in the kiosk field, installing kiosks at many of its French outlets a decade ago and now rolling them out in 2,500 of its 14,000 U.S. restaurants.²⁴ Last year, Wendy's announced plans to install an average of three kiosks per store at approximately 1,000 locations,²⁵ and competitor Jack in the Box is considering swapping out cashiers for self-ordering kiosks and other technologies.²⁶ Taco Bell is also reportedly jumping on the kiosk bandwagon,²⁷ announcing plans to fund franchisees' acquisition of such devices.²⁸

For all the benefits self-service kiosks might confer to customers — including wait time reductions and more accurate ordering — the benefits are even greater for business owners. Shorter lines mean more customer traffic, and owners can gather large amounts of customer data through purchase histories and satisfaction surveys. Customers can be more readily enlisted in loyalty programs, too, thanks to the fact that payment is typically handled through credit and bank cards or digital wallets. In addition, self-service kiosks can collect invaluable data concerning in-store traffic patterns, top-searched products, wait times and in-store satisfaction.

There are other benefits to having a computer take a customer's order, though. A computer never forgets to ask if one wants fries with a burger, and can highlight high-margin items and toppings. One study found 20 percent of customers who didn't initially order a drink would do so if one was offered.²⁹ Even without coaxing, ordering at kiosks tends to result in higher tabs. Other research found McDonald's customers who used self-service kiosks spent 30 percent more, on average.³⁰

What's going on? It might be that removing real or imagined social judgment may mean consumers feel less inhibited to place larger orders — a phenomenon that could be good for a restaurant's bottom line, if not a customer's waistline. This effect has also been observed when ordering food through mobile apps.³¹

²⁴ Kim, Tae. McDonald's hits all-time high as Wall Street cheers replacement of cashiers with kiosks. CNBC. 2017. <https://www.cnbc.com/2017/06/20/mcdonalds-hits-all-time-high-as-wall-street-cheers-replacement-of-cashiers-with-kiosks.html>. Accessed April 2018.

²⁵ Associated Press. Wendy's plans self-ordering kiosks at 1,000 locations. Business Insider. 2017. <http://www.businessinsider.com/ap-wendys-plans-self-ordering-kiosks-at-1000-locations-2017-2>. Accessed April 2018.

²⁶ Taylor, Kate. Fast-food CEO says 'it just makes sense' to consider replacing cashiers with machines as minimum wages rise. Business Insider. 2018. <http://www.businessinsider.com/jack-in-the-box-ceo-reconsiders-automation-kiosks-2018-1>. Accessed April 2018.

²⁷ Luna, Nancy. Taco Bell says self-serve ordering kiosks are next big push for 2018. Orange County Register. 2017. <https://www.ocregister.com/2017/12/14/taco-bell-says-self-serve-ordering-kiosks-are-next-big-push-for-2018/>. Accessed April 2018.

²⁸ Bomey, Nathan and Meyer, Zlati. McDonald's fast-food ordering kiosks will boost sales, analyst says. USA Today. 2017. <https://www.usatoday.com/story/money/2017/06/23/mcdonalds-fast-food-kiosks/423501001/>. Accessed April 2018.

²⁹ Gavett, Gretchen. How self-service kiosks are changing customer behavior. Harvard Business Review. 2015. <https://hbr.org/2015/03/how-self-service-kiosks-are-changing-customer-behavior>. Accessed April 2018.

³⁰ Fishman, Charles. The toll of a new machine. Fast Company. 2005. <https://www.fastcompany.com/49359/toll-new-machine>. Accessed April 2018.

³¹ Olea, Frank. How self-service retail kiosks change consumer behavior. Kiosk Marketplace. 2015. <https://www.kioskmarketplace.com/blogs/how-self-service-retail-kiosks-change-consumer-behavior/>. Accessed April 2018.



NO MORE WAITERS & CASHIERS?

Another force may be driving the proliferation of self-service kiosks, and it has long fueled automation: the desire to cut labor costs. This would appear to be the case in the restaurant sector, on which U.S. activists have focused their fight for higher wages. The most prominent campaign is known as “Fight for \$15,” an effort to boost minimum wage in restaurants and other fields to \$15 per hour.³² Considering approximately 3 million people work as waitstaff or counter attendants in the U.S., the impact of self-service kiosks on these workers could be significant.³³ Indeed, the same could be said for a range of occupations — from drivers to receptionists — also being disrupted by automation. According to a McKinsey & Company report, at least one-third of the duties in 60 percent of occupations could be automated.³⁴

Others emphasize that automation doesn’t displace human labor so much as allow it to be directed toward more productive purposes. Company officials with McDonald’s have said the number of crew members per restaurant has been the same or higher at those with kiosks, with workers acting as support when stores get crowded.³⁵ If a restaurant can get more orders through self-service kiosks, more work will be required to fulfill them. Panera Bread claims its kiosks have allowed it to put more workers into the kitchen to boost productivity. “In fact, in most cases, Panera increases the number of associate hours in [its] cafes, and they see increases in overall guest satisfaction,” a company official said.³⁶ As is often the case with the introduction of any new technology, time will tell if the self-service kiosk disruption will prove to be a net positive for society.

³² Author unknown. Fight for \$15 about us. Fight for 15. Date unknown. <https://fightfor15.org/about-us/>. Accessed April 2018.

³³ Author unknown. Occupational Employment and Wages. U.S. Bureau of Labor Statistics. 2017. <https://www.bls.gov/oes/current/oes353031.htm>. Accessed April 2018.

³⁴ Batra, P; Bughin, J; Chui, M; Lund, S; Ko, R; Manyika, J; Sanghvi, S and Woetzel, J. What the future of work will mean for jobs, skills, and wages. McKinsey & Company. 2017. <https://www.mckinsey.com/global-themes/future-of-organizations-and-work/what-the-future-of-work-will-mean-for-jobs-skills-and-wages>. Accessed April 2018.

³⁵ Tencer, Daniel. McDonald’s Canada: Self-serve kiosks not a threat to jobs. Huffington Post. 2015. http://www.huffingtonpost.ca/2015/08/25/mcdonalds-self-serve-canada_n_8038486.html. Accessed April 2018.

³⁶ Johnson, Hollis. Fast food workers are becoming obsolete. Business Insider. 2016. <http://www.businessinsider.com/self-service-kiosks-are-replacing-workers-2016-5>. Accessed April 2018.

CONCLUSION

The concept of using a machine to supply a product directly to a consumer without a salesperson reaches as far back as the Greek Empire, by some accounts. In the modern era, such devices have long been purveyors of food, snacks and beverages, whether a candy bar beckoning from behind the plexiglass of a vending machine, or the more recent, mouthwatering image of a hamburger displayed on a self-service kiosk screen. Such technology offers the promise of immediate gratification, and without the real or assumed judgment that might come from human interaction.

It's no wonder, then, that food and beverages are the most common self-service kiosk category. The market totaled more than \$200 million in 2016, considerably more than any other device category, and growth has remained strong, projected to rise by 7 to 8 percent over the next few years. Shipment volumes are growing even faster, by 11 percent, a possible indication that prices per unit are dropping. All of this means self-service kiosks could very well be arriving at a nearby street corner, transit station or restaurant.

From a business perspective, the benefits of the unattended retail surge are manifold. Today's high-tech kiosks offer immediate, real-time data on which products or menu items are popular. They rely on quick and data-rich digital payment methods, and make it easier to coax customers into loyalty programs. These, in turn, allow businesses to track customer habits and preferences. The benefits are especially apparent in the case of QSRs, allowing them to process orders faster and more accurately than a cashier — and, if so programmed, will never forget to upsell to customers.

There are also the potential savings on labor costs, no minor concern in light of the U.S. campaign for higher food service worker wages. Labor activists naturally view automated kiosk development with caution, and some may question whether having such an abundance of food and drink — especially of the fast food variety — at one's fingertips is such a good thing. This sounds like a worthy topic for a consumer survey, perhaps coming to a kiosk near you.

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