

SLIDE 1

Global Installed Base of Deployed Kiosks (2024–2026)

Headline

3 – 9 Million Self-Service Kiosks Deployed Globally

Base Case: ~5.5 Million

How This Was Derived (Defensible Method)

Revenue Anchor:

Global self-service / interactive kiosk market \approx **\$34B (2024)**

Annualized kiosk-year economics:

- Low case: \sim \$4,000 per deployed kiosk per year
- High case: \sim \$10,000 per deployed kiosk per year

Implied installed base:

- $\$34\text{B} \div \$10\text{K} \approx$ **3.4M**
- $\$34\text{B} \div \$4\text{K} \approx$ **8.6M**

Rounded defensible envelope:

3M – 9M deployed kiosks worldwide

Cross-Check by Vertical (Range Model)

Vertical	Low	Base	High
QSR / Fast Casual	0.9M	1.6M	2.5M

Vertical	Low	Base	High
Retail (SCO + service kiosks)	0.8M	1.3M	2.0M
Healthcare	0.25M	0.45M	0.8M
Travel & Hospitality	0.25M	0.45M	0.7M
Entertainment / Venues	0.15M	0.25M	0.45M
Government / Civic	0.10M	0.20M	0.35M

Total:
Low: ~2.45M
Base: ~5.5M
High: ~8.85M

Matches the revenue-derived envelope.

SLIDE 2

Serviceable Installed Base for AI Connect Bar

AI Connect Bar targets conversational ordering and AI interaction across:

- Drive-thru voice ordering
- In-store kiosk ordering
- Wayfinding / concierge
- Service counters

Attachable Installed Base (Subset of Global)

We exclude:

- Pure bill pay kiosks
- ATMs
- Simple ticket dispensers
- Non-interactive digital signage

We include:

- QSR ordering kiosks
- Drive-thru ordering lanes
- Foodservice kiosks in retail
- Hospital registration / concierge
- Venue ordering kiosks
- Airport F&B kiosks

AI-Relevant Installed Base

Category	Base Estimate
QSR In-Store Ordering	~1.6M
Drive-Thru Lanes	~0.6M
Retail Foodservice & C-Store	~0.4M
Healthcare Registration / Concierge	~0.45M
Travel / Airport / Hospitality	~0.45M
Venues / Entertainment	~0.25M

Total AI-Relevant Installed Base:

~3.0M (Base Case)

Range: **~1.8M – 4.8M**

EXECUTIVE NUMBERS PANEL (For Investor Slide)

Global Installed Base (All Kiosks)

- Low: **3M**
 - Base: **5.5M**
 - High: **9M**
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AI Connect Bar Serviceable Installed Base

- Low: **1.8M**
 - Base: **3.0M**
 - High: **4.8M**
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Annual Deployment Velocity (Replacement + New Growth)

Assuming 5–7 year lifecycle:

- ~15–20% of installed base refreshes annually
- Base case refresh market:
 $5.5\text{M} \times 15\% \approx \mathbf{825,000 \text{ units/year}}$

That is your **annual recurring opportunity floor**, before expansion growth.

Strategic Takeaway Slide (Optional Add)

- The installed base is already massive
- ~3M endpoints today can support conversational AI overlays
- ~800K+ endpoints refresh annually
- AI does not require new hardware in most cases
- Attach rate drives exponential upside