



Kiosk Association U.S. Access Board presentation for public session on kiosks May 2021 -- What The KMA Does

- Inform -- News from around world
- Educate - free data and reports
- Improve Unattended Self Service
- Regulatory Focus
 - ADA - US, Europe, UK, Korea, Asia
 - PCI (Cardholder Activated Terminals)
 - UL Standards
 - HIPAA
 - FDA (temperature scanning)
 - Medical 60601
 - Gaming GLI
 - VPAT
 - WCAG

Hello, my name is Craig and I am the manager of the Kiosk Association. I want to thank our committee chairmen Randy Amundson of Frank Mayer and Associates, Inc. and Peter Jarvis with Storm Interface. Also thanks to Laura Miller with Vispero who is also on the panel and presenting today. The most important takeaway from our organization is our primary purpose to Inform and Educate. No-cost advice, consulting and case studies.



The Need for Access Standards

Days of old

*Do kiosks and self-service need accessibility?
Let's take a quick look back at what it used to be
composed of.
Confusing and out of position components
identified with Post-It notes.
Not uncommon.*



The Need for Access Standards

Companies with internal IT geeks tell us all the time that, “Not to worry. We got usability figured out.”

Then they save some money and do this.

There are far too many “Not the best idea” examples and we have a whole photo gallery dedicated to them.

Internal IT department personnel are very skilled in internal network operations. Not so experienced in public-facing.

Many times there is a disconnect between the procuring department, the IT department, and installation teams. Our general advice is use an experienced provider first, and then you can let the IT people modify it from there. Don't be a guinea pig for your IT group.

One bright spot is that mobile proxy operation for kiosk screens is becoming a standard option.

The Need for Accessibility - Misconceptions & Barriers

Common misconceptions about kiosks and ADA compliance:

- A simple paragraph declaring “must be ADA compliant” is sufficient
- ADA only applies to wheelchair access
- If there are store personnel available to help the disabled person then no need to comply
- An audio jack by itself satisfies ADA access for people with vision impairments
- Installation and site considerations are overlooked

Barriers to ADA compliance;

- Developing or Revising the user interface (software) to incorporate text to speech can be problematic
- ADA compliance is too complicated and the standards are too vague
- Confusion about which department’s accessibility standard for kiosks should apply
- State laws vary -- California versus Alabama e.g.
- Companies may do cost analysis vs liability and decide against (Casinos e.g.)
- Accommodating multiple devices within a small accessible “strike zone” is a challenge at times

Providers of self-service transaction machines encounter multiple barriers when recommending compliance.

These are some of the more common ones.

In our experience, modifying the application software is one of the bigger barriers.



How KMA Promotes Access

- **Tradeshows**
 - Retail (NRF)
 - Restaurants (NRN)
 - Hospitality
- **Relations**
 - RNIB
 - IAAP
 - NFB
 - Patent Reform
- **Legal Liability Monitor**
- **Monthly Newsletters (9,000)**
- **LinkedIn (2M)**
- **PRNewswire monthly**
- **ADA 14-Point Checklist**
- **ADA Code of Practice**
- **WCAG 2.1 Checklist**

The Kiosk Association amplifies the U.S. Access Board message in many ways. Primarily thru physical and virtual tradeshows such as NRF and NRA where we are dealing directly with deployers. We provide research and guideline docs for accessibility and PCI.



PARTICIPATING ORGANIZATION

How KMA Promotes Access

- Speaking engagements
- Proposed and proposing new working group for PCI-SSC named “Integrated Cardholder Activated Terminals” or ICAT (cousin of ICT)
- Audio and integrated QR readers are next generation in v5.
- No commissioning required.
- See our [PCI Update](#)

PCI EMV along with ADA comprises our primary regulatory focus. 2021 has seen the introduction of true audio in payment processing. In the PCI space we refer to ICAT or Integrators of Cardholder Activated Terminals. Very similar to ICT in the ADA space. Text, Palm, QR Pay and Facial Payment are emerging methods versus standard swipe.



U.S. Self-Service Kiosks:

January 2021

Market Research

Community directed and peer reviewed research. Not your typical internet scrape.

We are happy to provide a free copy of up to any three reports to registered viewers today. Sorry, but kiosk vendors are not included...Contact craig@kma.global or call

- 2021 Kiosk Market
- US Retail Ecommerce
- NRA State of 2021
- 2021 Payments EcoSystem
- IAAP Whitepaper
- 50 other verticals and reports

KMA sponsored a 2021 Market Research Report for Kiosks and Self-Service. 134 pages with 10 pages of charts along with directory of resources. This report was community directed and peer reviewed. In December 2021 we issue updated edition prior to NRF

U.S. Self Service Applications

- Check-in
- Check-out
- Ticketing
- Self-Order (McDonalds e.g.)
- Banking
- Bill Pay
- Digital Menu
- Bitcoin
- Temperature
- Touch Screen Form Factors from 5” to 85”
- Payment: Mag Stripe Card, EMV Card, NFC Card, Cash, Check, Text, QR, Facial, other Biometrics and BNPL (Buy Now Pay Later)

Market Applications

These are “functional” applications that extend from one market segment to another.

Checking in at a hospital patient kiosk is not much different from a hotel check-in or a ticketing check-in.

First Name, Last Name, Address, Phone + some sort of token credential.

A virtual fixed interface

We have functional verticals such as Check-In and Check-Out (or Wayfinding). Most are user authentication with payment interface and variants of that. Many are purely local UI.

U.S. Self Service Markets

- Hospitality
- Entertainment (Ticketing e.g. Disney or AMC)
- Healthcare
- Fast Casual Restaurant
- Financial
- Food Service
- Travel (CLEAR e.g.)
- Transportation
- Government (Federal, State, City)
- Education
- Gaming (Loyalty & Sports Betting)
- Corrections

Market Research

- Market segments have differences.
- HIPAA privacy concerns are paramount in healthcare.
- PCI is paramount in transactional payment.
- Accommodating the required devices in shrinking zone is one of the challenges for kiosk manufacturers.

We also deliver functional self-service terminals across different market industries. "Retail" grocery store have healthcare centers and government DMV license renewals for example. Cities are turning downtowns into pedestrian access with smart city terminals.

Market Revenue Numbers for 2019 thru 2025

User	2019	2020	2021	2022	2023	2024	2025	CAGR% 2020-2025
Retail	453	340	411	465	540	626	724	16
Healthcare	312	299	379	450	527	615	715	19
Financial	329	285	347	407	480	566	669	19
Travel	380	312	373	424	482	545	614	14
Hospitality	406	283	329	373	422	474	530	13
Gov	241	177	205	232	262	293	324	13
Restaurant	177	140	173	203	237	276	320	18
Education	87	62	71	\$82	94	107	121	14
Others	227	177	200	233	271	313	360	15
Total	\$2,611	\$2,074	\$2,488	\$2,867	\$3,314	\$3,816	\$4,379	16



Thanks -- For more information

- Craig@kma.global | 720-324-1837
- Websites
 - Kiosk Industry
 - KMA Association
 - Automated Retail
 - Self Service Industry
 - Patient Check-In Kiosks
 - Thin Client Computing
 - Point-of-Sale RFPs
 - Smart City Design
 - Digital Business
 - Digital Signage Solutions
 - Touch Screen Technology
 - Digital Menu Board
 - Check-In
 - Self-Service Kiosk Consulting