



Voice Biometrics Census:

Global Tally of Voice Security and Authentication Implementations »

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Opus Research is proud to provide the first census of voice biometrics deployments for customer care and mobile applications around the globe. It is based on the compilation of information about over 150 instances with more than 70 million registered, protected individuals. Data are analyzed by geographic region, vertical industry and application domain.



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Dan Miller, Lead Analyst, Opus Research

Opus Research, Inc.
350 Brannan St., Suite 340
San Francisco, CA 94107
www.opusresearch.net

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For more information, including purchasing Opus Research's "Voice Biometrics Census and Forecast" report, please contact:

Pete Headrick
e | pheadrick@opusresearch.net
p | +1-415-904-7666



You are holding the first census of known voice biometric implementations around the globe. But wait! There's more, based on more than 10 years of tracking development and implementation of voice biometrics technologies in contact centers, over enterprise networks and on mobile devices, Opus Research is ready to forecast the growth in enrollments and forecasted revenues through 2017.

We are grateful to the solution vendors who provided information to support our findings. Key participants in the census include (in alphabetical order): Agnitio, Auraya (ArmorVox), Nuance Communications, Sestek, ValidSoft and Voice Trust.

Key Findings

The following are the key findings of this report:

- > **Overall: The number of individuals directly counted in our census is over 56 million. This is probably 80% of the total number of people finding that the use of spoken passphrases (“spoken tokens”) is a convenient, secure way to initiate trusted, highly personalized commercial conversations.**
- > **Revenues were less than \$200 million in 2013 expected to grow to \$584 million in 2017: Opus Research’s forecasting model is driven by enrollments, professional services/maintenance and activity-based fees.**
- > **Regions differ significantly: Adoption rates and usage patterns vastly differ across geographic regions. EMEA (with an emphasis on Turkey) leads the world in contact center-based implementations, especially in the telecommunications vertical. North America is the proverbial “sleeping giant” with a plethora of relatively small-scale trials in operation and high potential for rapid expansion.**
- > **As for applications: There are interesting conclusions to be drawn from contrasting the number of implementations to the overall enrollment count. As would be expected, “contact center” applications account for roughly one-half of all implementations and three-quarters of enrollments. Meanwhile, “password reset” is nearly one-third of deployments but, because the enrollees are employees not customers, scale is measured in thousands, not millions. It is emerging as the “entry point” for voice biometrics in enterprise IT environments, demonstrating immediate efficacy and return on investment.**
- > **The telecom vertical rules (for now): Today the largest implementations are by wireless carriers and diversified telecommunications companies, with special attention due to Turkey, where voice-based authentication is an accepted practice. Yet, when looking at the companies who are examining their alternatives, the roster is dominated by financial services, with healthcare/insurance running a close second.**
- > **High growth is at hand: Recent “wins” in eGov and Mobile categories have the potential to bring tens of millions of individuals into the Voice and multi-factor authentication world. Revenues from application development and transactions will soon follow.**



About Opus Research

Opus Research is a research-based advisory firm providing critical insight and analysis of enterprise implementations of software and services that support multimodal customer care and employee mobility strategies. Opus Research calls this market “Conversational Commerce” with tailored coverage and sector analysis that includes: Self-Service & Assisted Self-Service, Voice & Call Processing, Web Services, Personal Virtual Assistance, Mobile Search and Commerce and Voice Biometrics. **www.opusresearch.net**

For sales inquires please e-mail info@opusresearch.net or call +1(415)904-7666

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