



Voice Biometrics Census & Forecast

Findings from November 2014

Presented by:

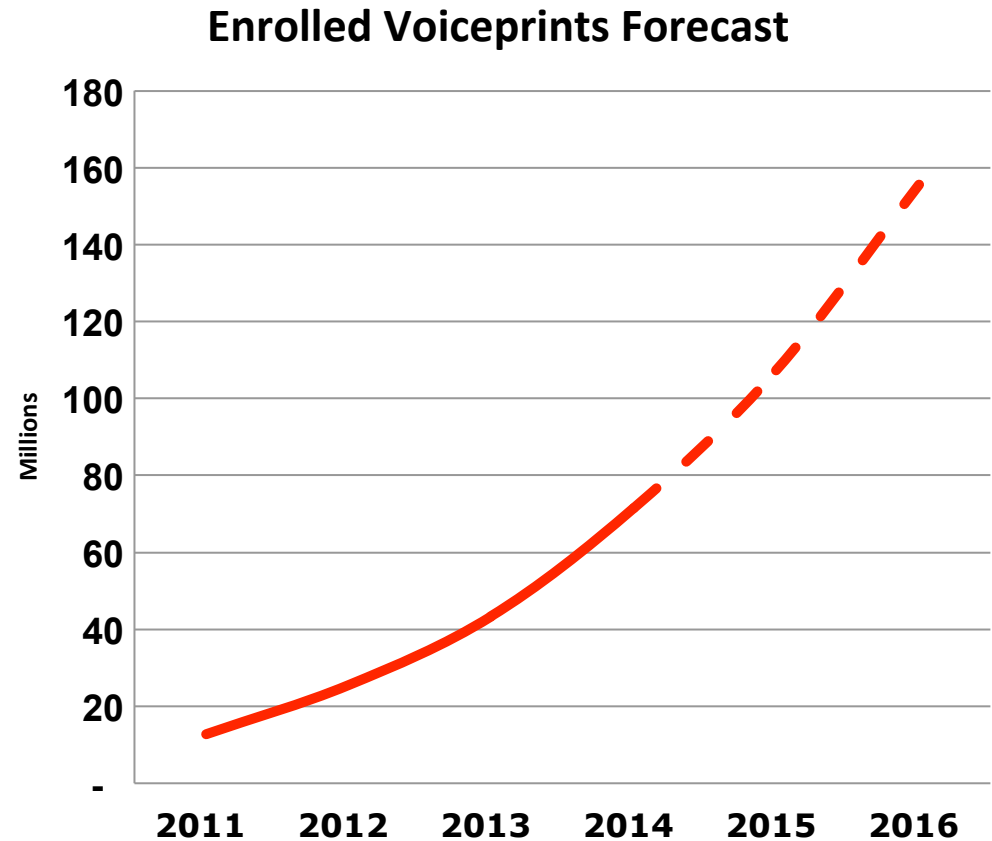
Dan Miller

The Time is Ripe

- Base of over 150 deployments
 - “Anonymous” info provided by major vendors
 - Over 56 million counted enrollees
 - Equates to roughly 70 million users
- Global in scope
 - Significant regional differences
 - Verticals: Telecom, Finance, eGov, Healthcare
 - Applications: Contact Center, PWR, Mobile, Citizens Services

Observing Exponential growth

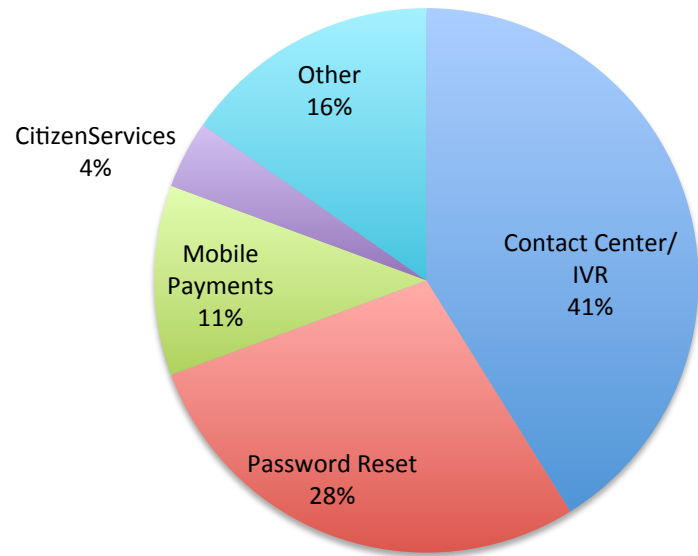
- Over 70 million enrolled
 - Telecom
 - eGov
 - Financial Services
- Geographically Dispersed
 - EMEA
 - APAC
 - North America
 - CALA



Application View

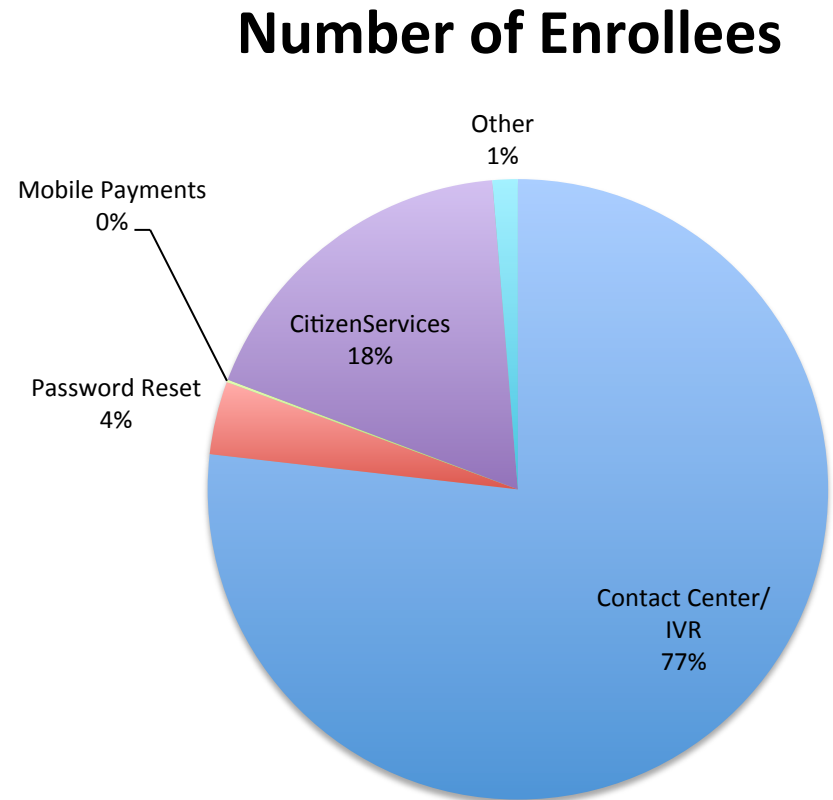
- Enterprise driven
 - Contact Centers
 - Password Reset
 - Mobile
- eGov & Other
 - Transfer Payments
 - Time & Attendance
 - Distance learning

Number of Installations



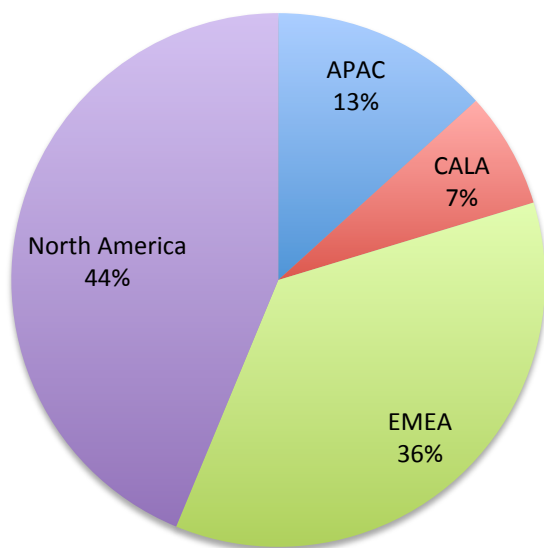
Enrollment POV: applications

- Contact Center-driven
 - Convenient auth
 - Citizens' Services
- Entry level & emerging
 - Password Reset
 - Mobile Payments



The regional view

Number of Instances

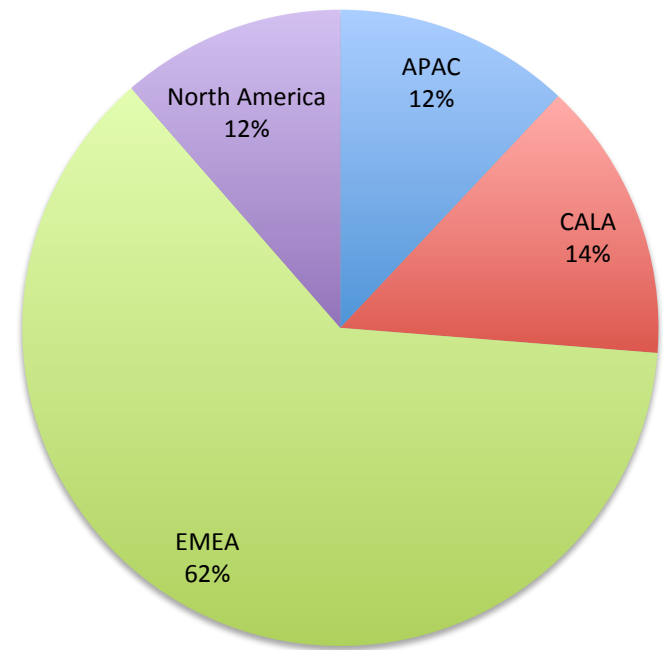


- Customer view
 - Favors North America
 - EMEA a close 2nd
- There's a back story
 - Australia/NZ have been aggressive
 - CALA is catching up

The world's enrolled voiceprints

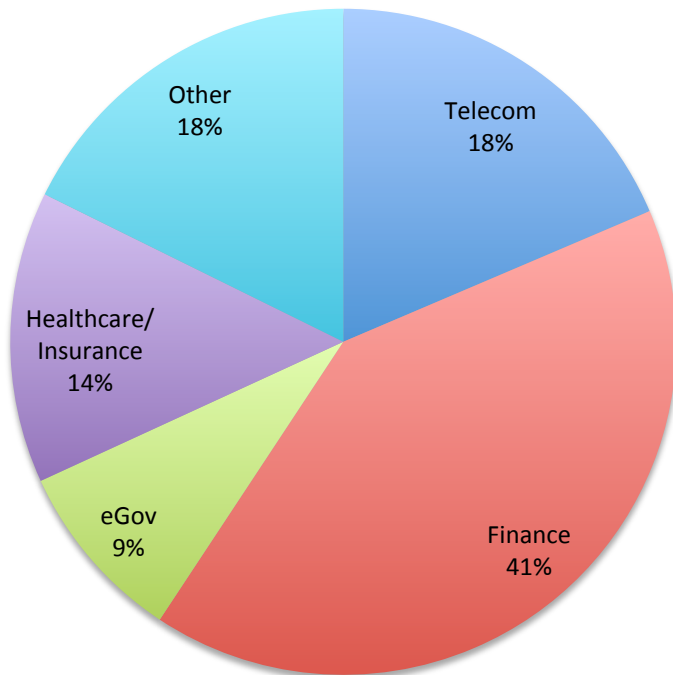
- More back story
 - Turkey and S. Africa showing the way
 - CALA and APAC at parity with North America
- Pent-up demand?
 - In North America
 - In eGov

Number of Enrollees



Financials lead the way

Number of Instances

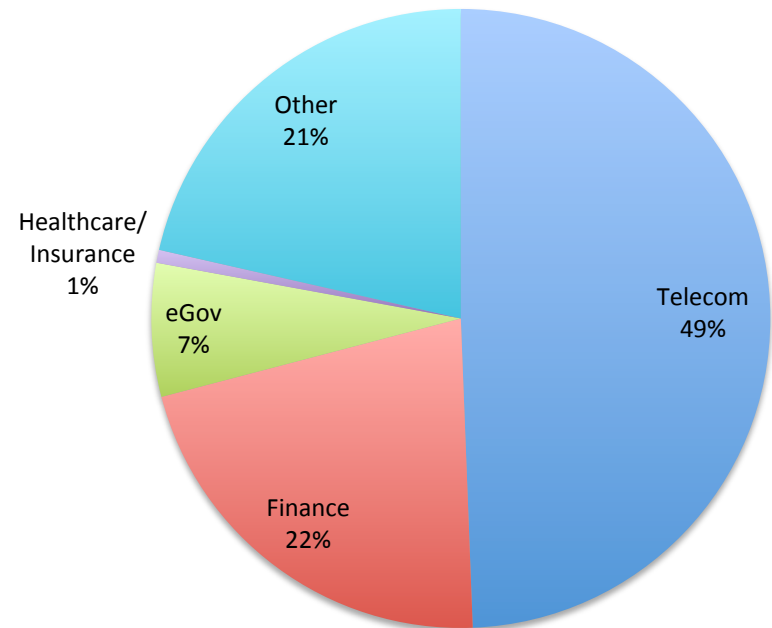


- In terms of “customers”
 - Finance leads
 - Telecom/Healthcare tie
 - eGov Lags
- But that’s misleading

Vertical enrollments

- Heavily Telecom
 - Reflecting Turkey
- Finance is second
 - Starting to mature
- eGov is the “sleeping giant”
 - Overcoming challenges

Number of Enrollees



Adoption Accelerating

- Growing recognition by general public:
 - *Convenient, secure way to initiate trusted, highly personalized commercial conversations*
 - *Especially popular for telecom and financial services*
- Business cases made for specific apps and verticals
 - *Hard dollar = Fraud loss reduction reduced average hold times (AHT)*
 - *Soft dollar = loyalty, mobility, competitive advantage*

Other signs of a mature technology

- Integrates with other enterprise software and infrastructure
 - Interactive Voice Response (IVR)
 - Contact center
 - Security
- Baked into mobile, passive and multifactor

Q&A and open issues (time permitting)

- Best practices
 - Business Case
 - Organization
 - Enrollment
 - Authentication
 - Architecture
 - Technology

