



Biometrics Market Development

Accelerating Solutions Development Through Strategic Relationships

Biometrics Acceleration 2002
June 10 - 12, 2002
Washington, DC

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Leading Edge Technology Expertise

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Emerging Market Analysis

- Segmentation Models
- Opportunity Sizing
- Technology Evolution
- Competitive Environment
- Target Profiling
- Niche Penetration Strategy
- Solution Effectiveness
- Positioning

Products & Services: Newsletter, Reports, Consulting

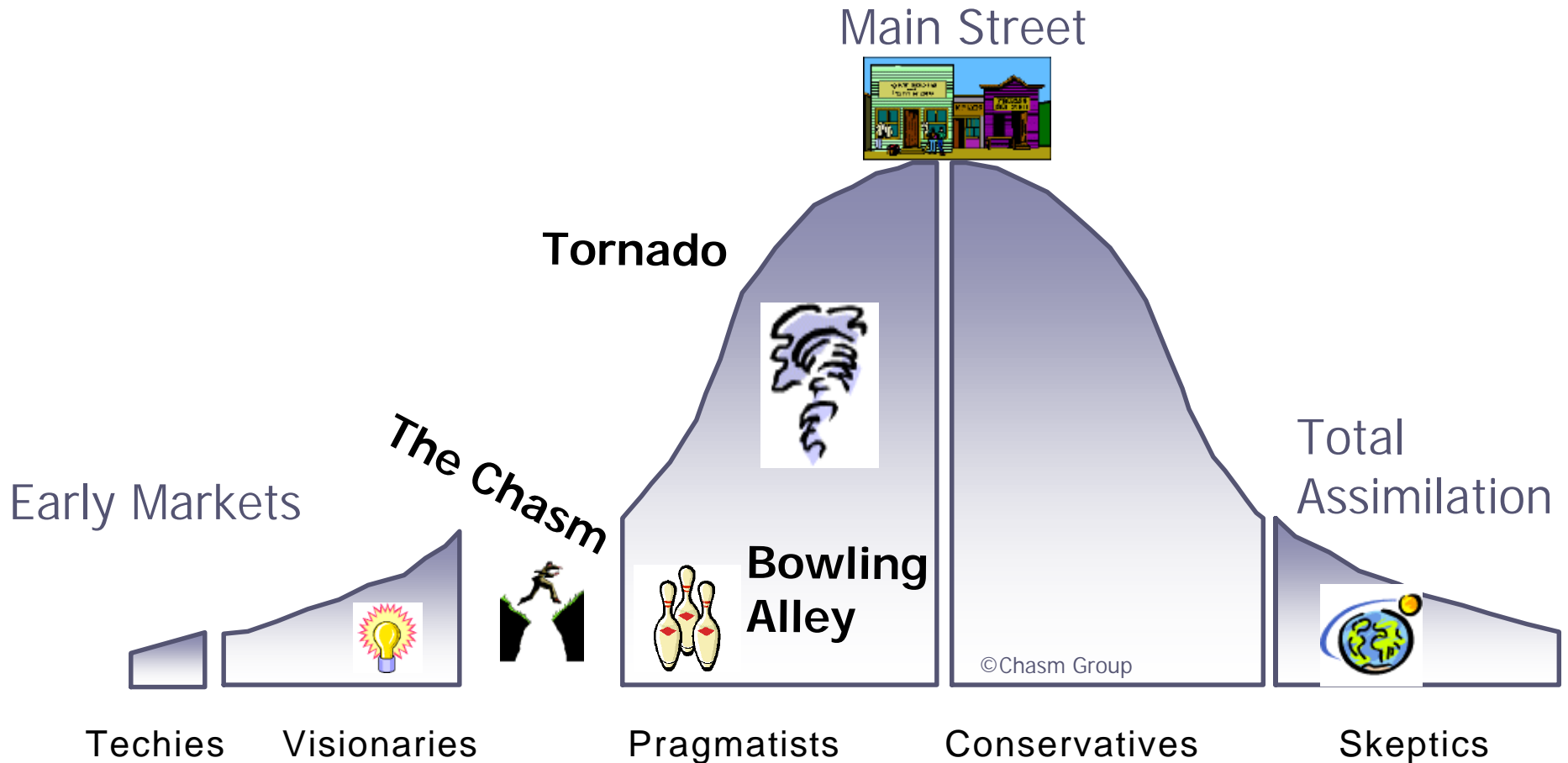


Accelerating Solutions Development Through Strategic Relationships

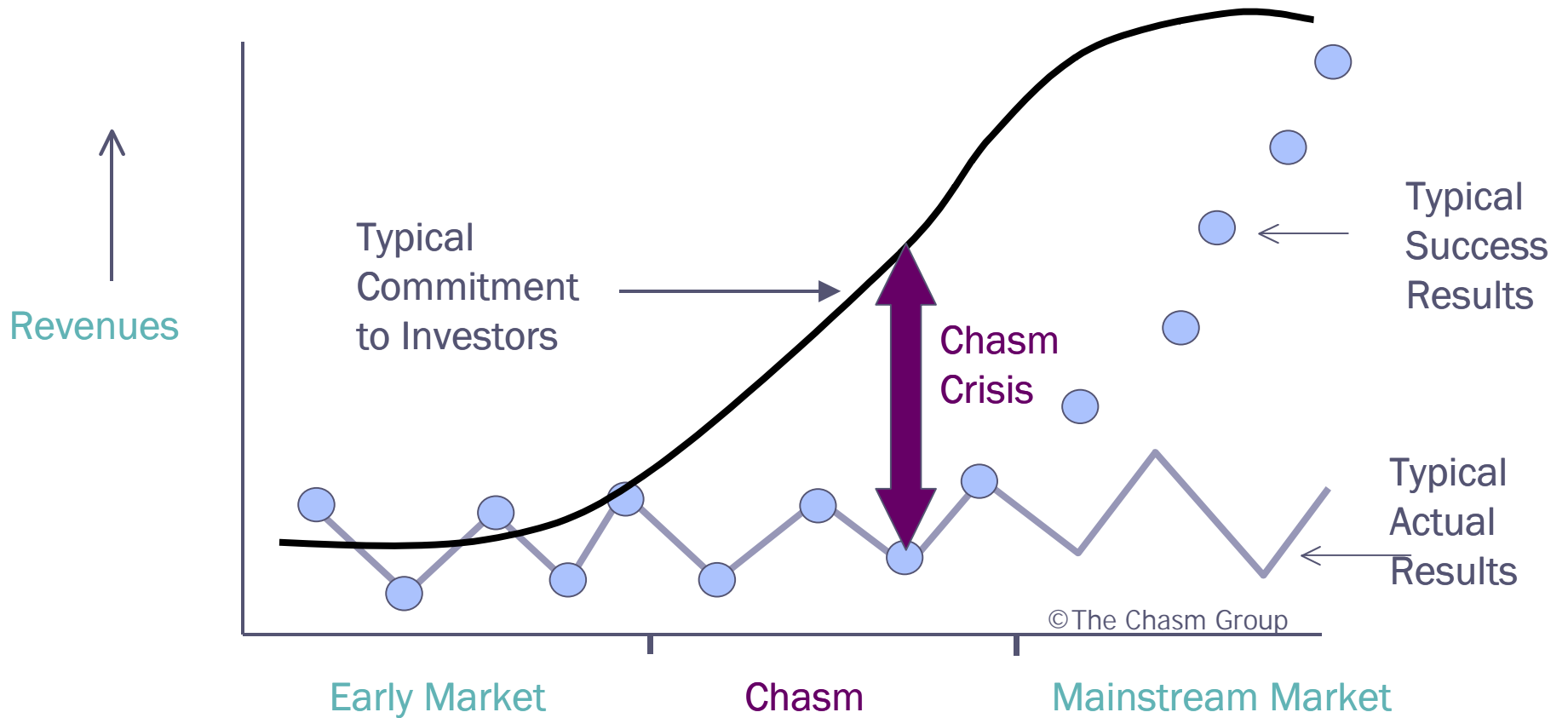
- Market Development Model
- Where is Biometrics Today?
- Market Penetration Plan
- Whole Product Solutions
- Industry Market Map
- Strategic Relationships

Market Development Model

Transitions are Not Smooth



Chasm Crisis



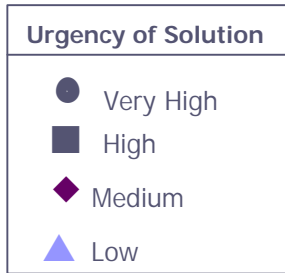
State of The Market

- ☛ Solutions NOT Technology
- ☛ Innovation From The Private Sector
- ☛ Multiple Small Scale Successes
Builds Credibility and Momentum
- ☛ Partnerships Are Key

Market Penetration Plan

- ☞ Internal Resource Evaluation
- ☞ Market Segmentation Matrix
- ☞ Opportunity Analysis
- ☞ Identify Niches
- ☞ Prioritize Targets
- ☞ Develop Whole Product Solutions

Biometrics Segmentation Matrix



	Government Administration	Law Enforcement	Aerospace & Defense	Financial & Insurance	Healthcare	Hospitality	Public Facilities	Travel & Transportation	Shipping & Warehousing	Energy, Utilities & Waste	Chemicals, Petroleum & Plastics	Pharmaceutical & Biotech	Agriculture & Food	Education	High Technology & Telecom	Other Manufacturing	Commercial Property	Retail	Automotive	Consumer Electronics	Residential
Physical Access	●	●	●	●	■	■	●	●	●	●	●	●	●	■	■	■	■	◆	▲	▲	▲
Logical Access																					
Secure Data personal, corporate, public	●	●	●	●	●	■	■	●	●	●	●	●	●	■	●	■	■	◆	◆	◆	◆
Financial Transactions POS, ATM, e-commerce, gov't disbursements	■	◆	◆	■	●	◆	◆	■	■	■	●	■	■	◆	◆	■	●	■	▲	■	◆
Identity Confirmation																					
Voter, Benefits, DMV, Drivers License background check	●	●	●	■	■	■	■	●	■	■	■	■	■	◆	◆	◆	■	▲	▲	▲	-
Time & Attendance																					
	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	▲	◆	◆	▲	◆	▲	▲	-
Surveillance																					
public & private	●	●	■	■	■	◆	●	●	■	●	●	●	●	■	◆	◆	■	■	▲	▲	▲

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Granulate: Travel & Transportation Segments

Urgency of Solution	
●	Very High
●	High
●	Medium
●	Low

	Air	Rail	Ship	Truck	Bus	Auto	Travel Services
Physical Access employee, crew, suppliers	●	●	●	●	●	●	●
Logical Access Secure Data personal, corporate, public	●	●	●	●	●	●	●
Financial Transactions purchase tickets	●	●	●	●	●	●	●
Identity Confirmation passport, trusted traveler	●	●	●	●	●	●	●
Time & Attendance	●	●	●	●	●	●	●
Surveillance public, private	●	●	●	●	●	●	●

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Granulate: Air Travel & Transportation Segments

Urgency of Solution
● Very High
● High
● Medium
● Low

	Airport Perimeter	Airport Public Access	Airport Private Access	Airplanes	Passengers	Airport Employees	Crew	Outside Suppliers	Baggage	Cargo & Mail	Airline Employees	Travel Services
Physical Access employee, crew, suppliers	●	●	●		●	●	●	●	●	●	●	-
Logical Access Secure Data personal, corporate, public	-	-	-	●	●	●	●	-	-	●	●	
Financial Transactions reservations, ticketing	-	-	-	●	-	-	●	-	●	●	●	
Identity Confirmation passport, trusted traveler	-	-	-	●	●	●	●	-	-	●	●	
Time & Attendance	-	-	-	-	●	-	-	-	-	●	●	
Surveillance public, private	●	●	●	●	●	●	●	●	●	●	●	●

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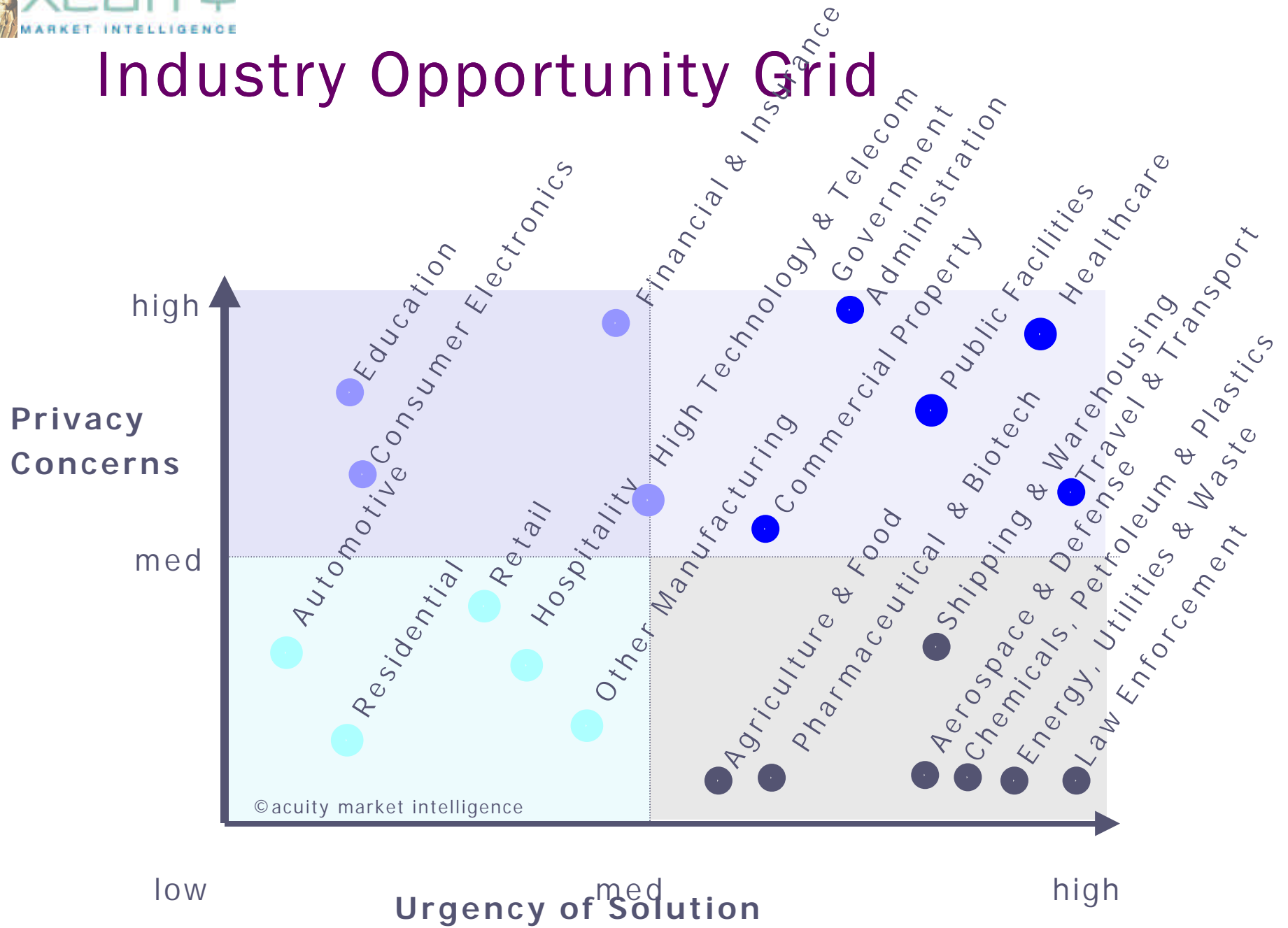
Size: Target Segment Sizing

Airport Secure Access Example U.S. DOT Data

Airport Type	Number of Airports	Estimated Ave. # Secured Access	Total # of Secured Access Points	Gross Biometric Revenue @ \$1500 per Secured Access
Large hub	31	1000	31,000	\$46,500,000
Medium Hub	35	500	17,500	\$26,250,000
Small Hub	71	100	7,100	\$10,650,000
Non Hub	282	50	14,100	\$21,150,000
TOTAL	419		69,700	\$104,550,000

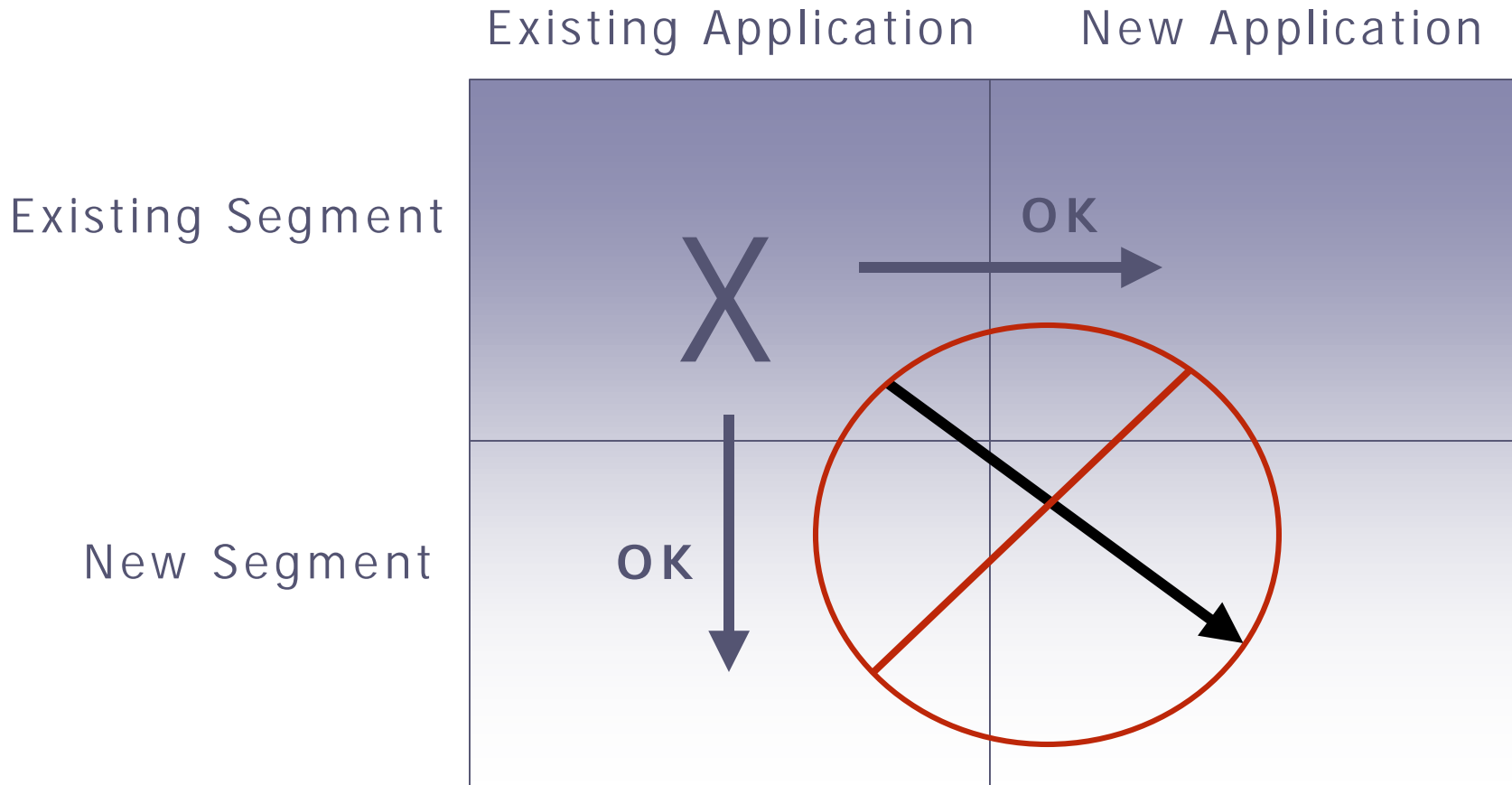
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Industry Opportunity Grid

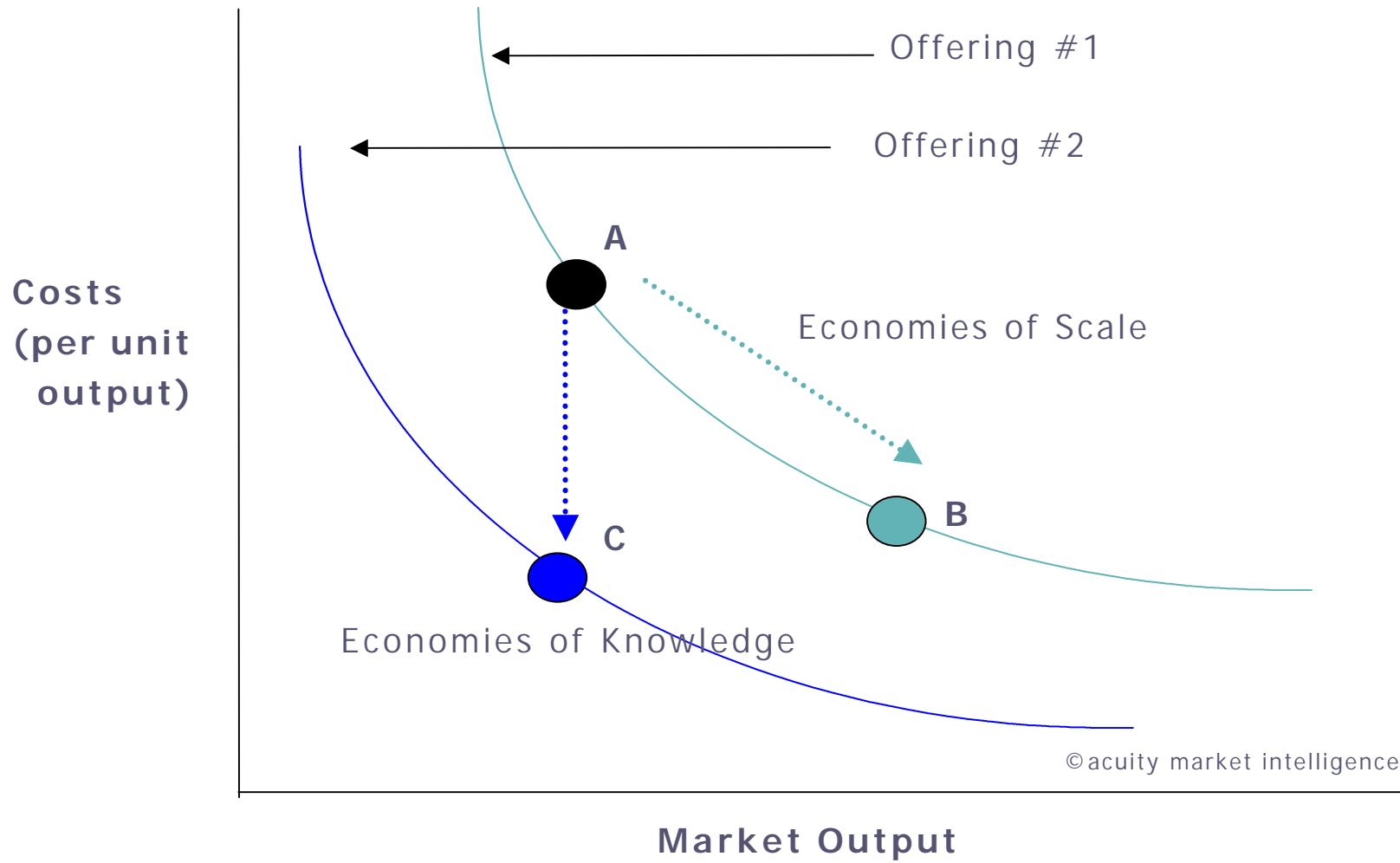


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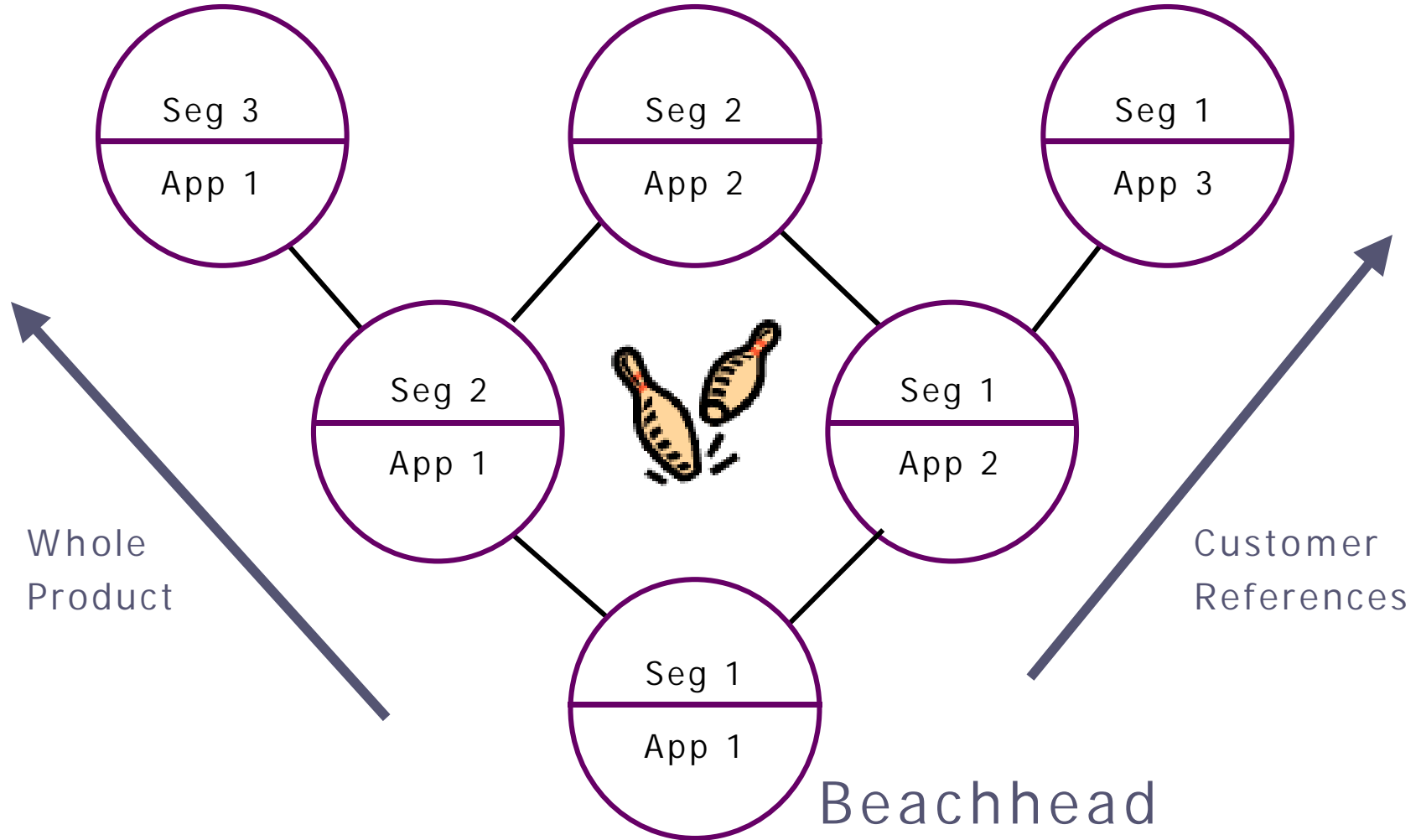
Niche Market Penetration



Economies of Knowledge[©]



Bowling Alley Strategy



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Towards Whole Product Solutions

We do not have, nor are we willing to adopt, any discipline that would ever require us to stop pursuing any sale at any time for any reason



Create a marketplace where your product is the only reasonable buying proposition

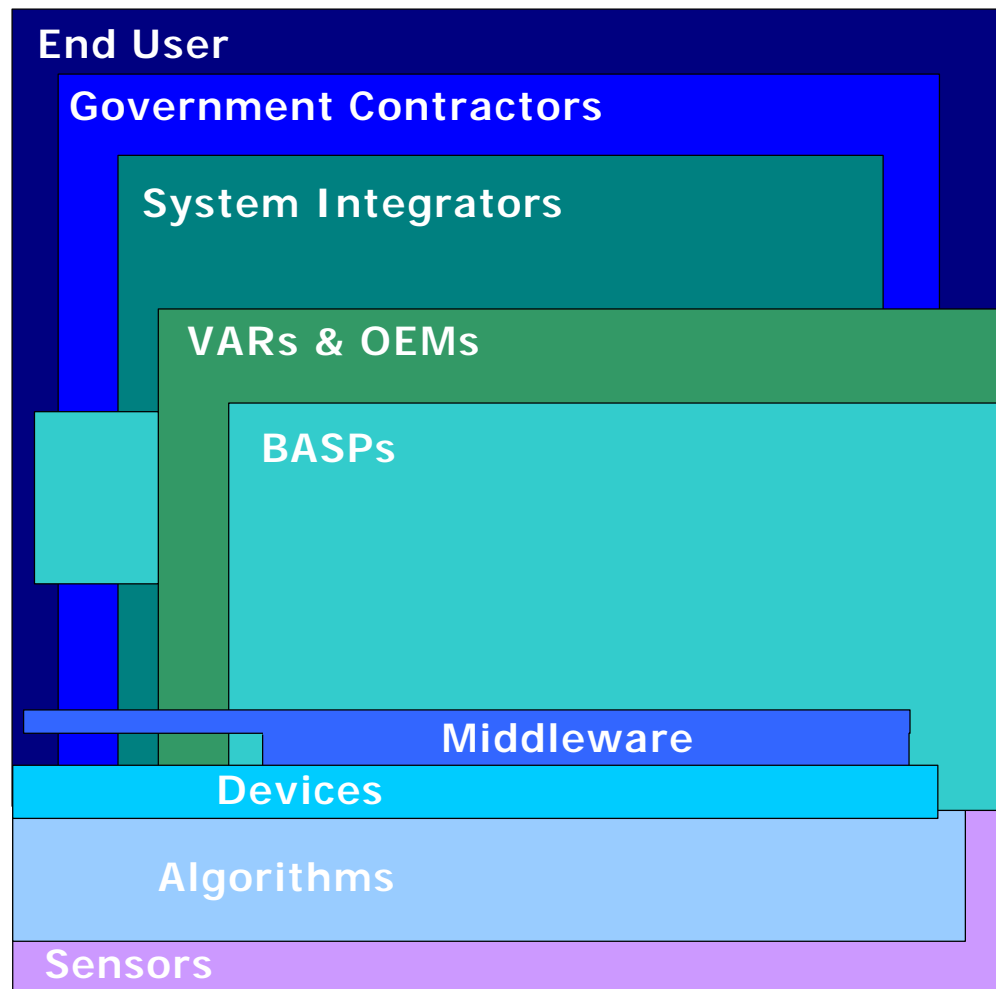
A GAP exists between the marketing promise made to customers – VALUE PROPOSITION - and the ability of the shipped product to fulfill that promise. To overcome this GAP, products must be augmented by services and ancillary products to become a **WHOLE PRODUCTS!!!!**

Strategic Relationships

**Create WHOLE PRODUCT SOLUTIONS
by leveraging Strategic Relationships**

***All Other Industry Players
Should BE Considered
Allies Until PROVEN
OTHERWISE!!!!***

Industry Market Map



Components of GOOD Relationships

- ☞ Alignment of Purpose
- ☞ Alignment of Priorities
- ☞ Clear Agreements
- ☞ Accountability
- ☞ Trust
- ☞ Communication

Types of Relationships

- ☛ Co-Marketing
- ☛ ISV
- ☛ Sales Channel
- ☛ VAR
- ☛ OEM
- ☛ System Integrator
- ☛ Joint Venture

Conclusions

- ☞ Biometrics is in The Chasm
- ☞ Market Analysis is NOT A LUXURY
- ☞ Strategic Application of Resources
- ☞ Where are you on The Map?
- ☞ Whole Product Solutions
- ☞ Partner Strategically for Success



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