

## Mobile Speech: Unlocking Personal Apps, Features and Functions

*The forces of human nature, technological progress and regulatory stricture are converging to boost interest in "truly hands-free" mobile applications. Dozens of firms have responded with a broad variety of software, services and features that work remarkably well. Next step: to build a sustainable market model.*

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## Key Findings:

- **Voice control of mobile services has made great strides** – A common theme in our research this year is that “the technology works!” and makes for a much-improved user experience.
- **More companies have joined the ecosystem** – The lure of mobile speech has attracted dozens of technology providers, application developers and solution providers (many of whom are profiled in this report).
- **Ecosystem members learning to play together** – Pursuit of the mobile masses has attracted providers of core technologies, builders of applications, retailers and “arms merchants.”
- **Revenue models are all over the place** – As with mobile applications in general, the top-line revenues come from a number of sources, including: technology licenses, monthly subscriptions, advertising and percentage of transactions.
- **So is application quality** – Better building blocks (in the form of recognition software, SDKs, APIs into mobile commerce resources) have attracted more developers, but not all create truly useful services.
- **Focus has shifted to results** – Whether its updating Facebook status, finding a song or artist or originating a text message, users of mobile speech are task-oriented.
- **Success is measured by task completion** – Rather than engine accuracy or automation rates, users want voice to help them accomplish specific objectives.
- **Adoption is a lagging indicator** – With a broad spectrum of applications and services available, awareness is gaining; but successful, repeated use is not yet a reality.
- **The “Long [Coat] Tail” of the iPhone** – Making “Voice Control” a standard feature of the new iPhone 3G S is a legitimization moment for application control, mobile search and dictation.
- **“Truly hands-free” apps are the next frontier** – Most speech enabled apps require a “button” to initiate recognition, but the next frontier is achieving hands-free/eyes-elsewhere engaged usability.

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