Speech-Enabled Mobile Search: Delivery Models for Information, Entertainment and Services

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Key Findings:

Conversational access to local and personal resources through mobile devices cries out for voice commands and the use of automated speech technologies to extend Web-based services to a broad array of mobile devices:

- **"Search" is the prevailing metaphor for interacting over the mobile Web** – Finding nearby people, businesses and things to do make for the foundation for mobile commerce, spawning activity that generated $4 billion in 2006 and will approach $8 billion in 2010.

- **The spoken word is the most natural way to initiate mobile searches** – For safety reasons in the short-term, and convenience in the long-term, the seamless integration of a speech-based interface should take hold.

- **Mobile Search will supplant directory assistance as the prevailing modality for finding individuals and merchants with which to do business** – In 2006, mobile subscribers initiated over 3.6 billion calls to directory assistance services in North America; growth in volume had been flat, but "free" alternatives are attracting new users.

- **Advertiser-supported models bring additional "free" services** – Popularization of "free" directory assistance (which is currently growing to cover all sorts of advertiser-supported search) is creating a better delivery infrastructure for relevant promotional messages in conjunction with mobile search results.

- **Speech technology providers are joining advertising aggregators, content syndicators and carriers to familiarize users and customers with speech-enabled search** – To some degree, the impending introduction of Apple's iPhone will begin to break the chokehold that carriers and device makers have on innovation.

- **Google's entry into "free DA" marked a turning point** – The first major speech-enabled "crossover" product from the largest search engine company fuels a pitched battle for mobile search revenues.

- **Usage by mobile subscribers will define the service mix** – Google, Tellme/Microsoft and many others offer a choice between automated speech, text and browser-based handling for local search and content search.

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