



Trends in Mobile Search

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JumpTap: White-Label Mobile Search and Advertising

- ▶ JumpTap is the leading white label mobile search and advertising solutions provider
- ▶ Deployed at over 10 mobile operators in US, Canada and Europe
 - Reach extends to over 140M subscribers
- ▶ Product suite includes
 - Full on-portal and off-portal search
 - Mobile specific UIs and relevancy models
 - Mobile search/keyword based advertising
 - Mobile display/banner based advertising
 - Published and operator solutions



TeliaSonera



Telefonica



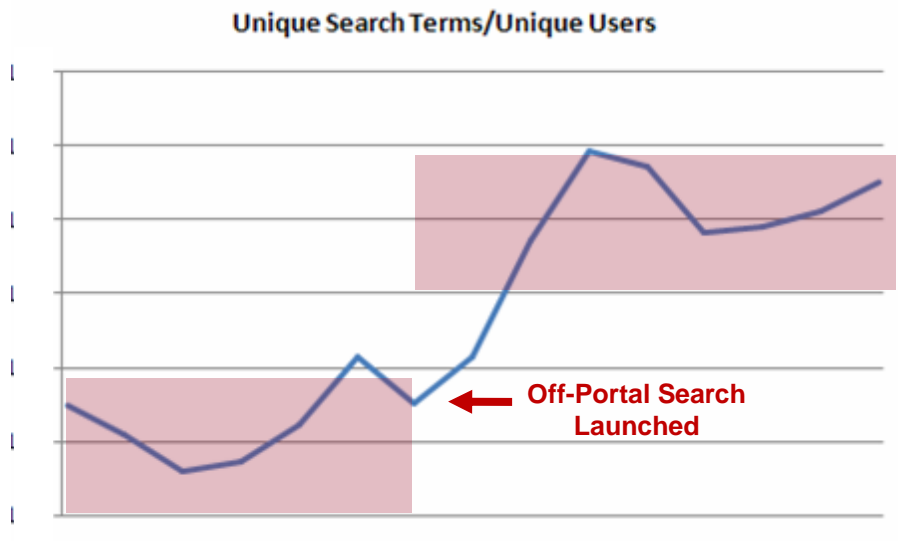
Mobile Search Usage: Usage Examples

Words Per Query:



Words	Sample of Standard Keypad Phone	BlackBerry Phones
one	~52%	~45%
two	~33%	~29%
three	~10%	~15%

Adult and Navigational queries excluded



- Off-portal search launched with a US operator
- Access to off-portal sites drove a rapid increase unique searches
- Overall search usage increased similarly

Growth in Mobile Specific Sites

- ▶ Mobile specific sites are important and will be for the foreseeable future
 - ...even on the iPhone*
 - Page size still impacts the user experience
 - Transcoding/adaptation technology still provides a very average experience

transcoded www.cnn.com

March 13, 2008 -- Updated 1232 GMT (2032 HKT)

[Make CNN Your Home Page](#)



updated 54 minutes ago

Governor's call-girl: I'm no monster

The woman at the heart of the Eliot Spitzer prostitution scandal reveals she has mostly gone without sleep since the case became public, according to media reports. The high-priced prostitute who met the New York governor, a key Democratic politician, reportedly told the New York Times: "I just don't want to be thought of as a monster." [full story](#)

- [Sources: Spitzer used service 8 times](#)

VS

m.cnn.com

CNN MOBILE
CNN.com

BREAKING NEWS

AP: CHALDEAN CATHOLIC ARCHBISHOP KIDNAPPED IN IRAQ LAST MONTH HAS BEEN FOUND DEAD, ITALIAN BISHOPS' CONFERENCE NEWS AGENCY SAYS.

LATEST NEWS

Spitzer's escort: 'I love who I am'



When the Emperors Club VIP said it was sending...

- Authorities arrest second suspect in UNC student slaying
 - Former Sen. Howard Metzenbaum dead at 90
 - Shuttle Endeavour docks with space station
- [See All News...](#)

Get Breaking News
Mobile Alerts from CNN

ELECTIONS CENTER 2008

- Ferraro steps down from Clinton campaign

Growth in Mobile Specific Sites

- ▶ The makings of a mobile ecosystem are now in place
 - Mobile search engines are driving traffic off-portal = **Users**
 - Mobile advertising programs are maturing = **Business Model**
- ▶ Top brands, online destinations, and mobile focused sites are all coming online

Top Brands



wap.mlb.com



mobile.lexus.com



www.statefarm.com/mobile

Online Destinations



www.amazon.com



m.facebook.com



xhtml.edmunds.com

Mobile Focused



radar.net



wap.mocospace.com

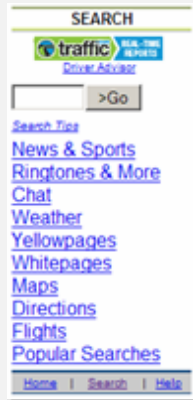


wap.gamejump.com

Trends in Mobile Search: WAP versus Client

▶ WAP versus Clients/Applications

WAP



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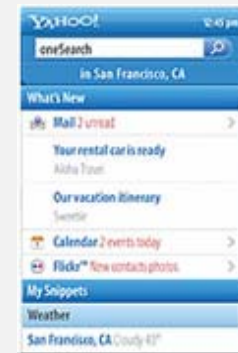
Yahoo! oneSearch

- ▶ Accessible by virtually any user
- ▶ Updates are immediately utilized
- ▶ Extremely limited interactions/displays
- ▶ No caching/backgrounding of tasks

Client



JumpTap/Alltel



Yahoo! oneSearch

- ▶ Much richer and faster experience
- ▶ Over 60% more searches per user
- ▶ Must be pre-installed or downloaded
- ▶ OS/device customization required

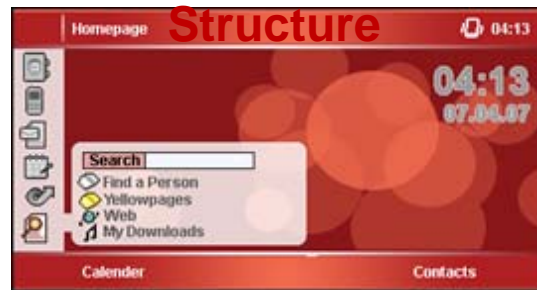
Trends in Mobile Search: Simplifying the Experience

- ▶ Getting to the search box is still a challenge for most users
 - The search box is still 3 to 5 steps away on most phones
- ▶ The search box will eventually be 0 to 1 steps away on all handsets

Quick Launch Keys



Part of Menu



Idle Screen

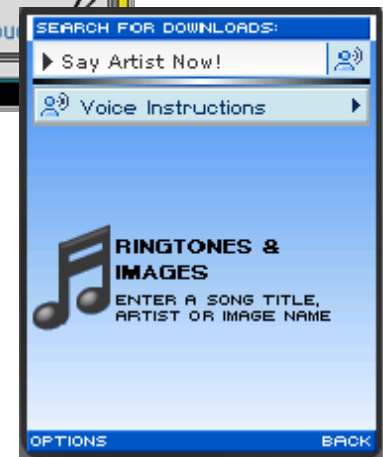
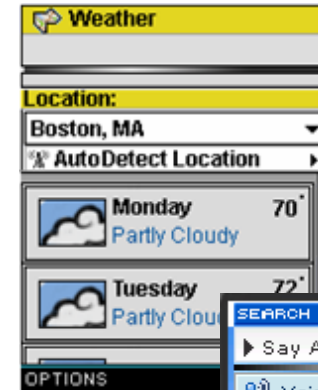


- ▶ As an interim, 'thin clients' that enable quick access to a WAP page:



Trends in Mobile Search: Create a Compelling Experience

- ▶ Improved utilization of the mobile medium
 - **Mobile must go beyond the web on a phone**
- ▶ Location services
 - Reduces user input requirements
 - Costs, coverage, and access remain an issue
- ▶ Audio and video inputs
 - Most devices have built in multimodal capabilities
- ▶ On-demand networks/connectivity
 - Create secure connection for POS transactions, sharing, etc
- ▶ Personalization
 - Most phones are not shared across multiple users
- ▶ SMS and MMS
 - Fairly popular search interface today (accessible and easy)
 - Long-term value is around information and content delivery



Trends in Mobile Search: Barriers to Growth are Falling

▶ The summary....why mobile is poised for rapid growth:

- Better products
- Data plans are simplifying
- Search boxes are moving closer to the user
- Flash and Silverlight will make the mobile experience richer
- Major brands moving into mobile
- Operators embracing off-deck strategies
- Better phones
- Faster networks
- Monetization has moved beyond selling ringtones, games, and wallpapers
- Mobile web services are being actively marketed to consumers
- Improved mobile search is providing the discovery and navigation tools
- Over 3.3 billion mobile users worldwide
- Voice and location services are beginning to mature
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Thanks!