

## INDUSTRY STATISTICS

### *Consumer Awareness*

According to a report by Millward Brown commissioned by the Bluetooth SIG, an average 81 % of consumers are aware of *Bluetooth* technology up from 73 % in 2005. Total awareness is extremely high (88-96%) in China, Germany, Taiwan and the UK. The largest rise in awareness was in the US, where it jumped from 58% in 2005 to 74% in 2006.

Bluetooth SIG press release, March 27, 2007

[http://www.bluetooth.com/Bluetooth/Press/SIG/AWARENESS\\_OF\\_BLUETOOTH\\_WIRELESS\\_TECHNOLOGY\\_CONTINUES\\_TO\\_CLIMB.htm](http://www.bluetooth.com/Bluetooth/Press/SIG/AWARENESS_OF_BLUETOOTH_WIRELESS_TECHNOLOGY_CONTINUES_TO_CLIMB.htm)

### *Mobile Phones and Headsets*

"The penetration rate of *Bluetooth* (technology) in cellphones is huge," said Douglas McEuen, ABI Research's senior analyst for wireless semiconductors. "We're estimating that worldwide, the 2008 market for cellular handsets is going to be close to 1.2 billion units, and over half of those will have *Bluetooth* capability. The volume is just enormous."

MSNBC, "Tools of the Road to Help You Go Hands-Free", July 1, 2008

<http://www.msnbc.msn.com/id/25459060/>

Bluetooth enabled handset sales worldwide are projected to grow at a compounded annual growth rate of approximately 7.68% over the years 2011 through 2015, as stated in a recent research report published by Global Industry Analysts, Inc.

Global Industry Analyst press release, April 29, 2008

[http://news.google.com/news/url?sa=T&ct=us/4-0&fd=R&url=http://www.emediawire.com/releases/handset\\_headset\\_pc/bluetooth/prweb900994.htm&cid=1154662336&ei=D2AXSPX9B4nkrQPUiID9Dg&usq=AFrqEzfrbdmEV-AEdVnHx7nPrf7QfU3b9w](http://news.google.com/news/url?sa=T&ct=us/4-0&fd=R&url=http://www.emediawire.com/releases/handset_headset_pc/bluetooth/prweb900994.htm&cid=1154662336&ei=D2AXSPX9B4nkrQPUiID9Dg&usq=AFrqEzfrbdmEV-AEdVnHx7nPrf7QfU3b9w)

According to recent research by IMS Research, over half the cellular handsets shipped in 2008 will contain a *Bluetooth* radio, a proportion rising to three quarters by 2012.

Cellular News, "Bluetooth & NFC, A Marriage Made in Heaven or Just Idle Fancy", April 23, 2008

<http://www.cellular-news.com/story/30714.php>

According to the IMS Research report, "The Worldwide Market for *Bluetooth*", global *Bluetooth* attachment rates for mobile phones are at 46.7% in 2007, up from 40% in 2006. This figure includes regional attach rates for the Americas, EMEA and Asia at 46.4%, 51.2% and 42.7%, respectively. Notably high, the percentage of mobile phones with *Bluetooth* technology in North America and Western Europe has reached over 60% and 70% respectively for the first time ever.

Bluetooth SIG press release, September 18, 2007

[http://www.bluetooth.com/Bluetooth/Press/SIG/BLUETOOTH\\_SIG\\_TESTING\\_TOOL\\_SETS\\_INDUSTRY\\_EXAMPLE.htm](http://www.bluetooth.com/Bluetooth/Press/SIG/BLUETOOTH_SIG_TESTING_TOOL_SETS_INDUSTRY_EXAMPLE.htm)

According to a survey conducted by In-Stat, 50% of cell phone users want *Bluetooth* functionality on their mobile phone.

In-Stat information alert, May 17, 2007

<http://www.instat.com/infoalert.asp?Volname=Vol.%20%23%20157>

### *Automotive*

Market watcher iSuppli has forecast that, in the US, the number of car manufacturers “aggressively adopting” *Bluetooth* wireless connections will rise from around 55 percent this year to a massive 82 percent in 2009. It said *Bluetooth* technology in your car is no longer just a feature only available in the poshest cars, but now a wireless data transfer technology that can be used with a whole host of devices, including stereos and handsets, and in a number of ways from hands-free calling to streaming audio transfer. The Register, “Bluetooth, iPods, HDDs to define in-car tech in 2009”, October 10, 2008  
[http://www.reghardware.co.uk/2008/10/10/isuppli\\_car\\_tech\\_2009/](http://www.reghardware.co.uk/2008/10/10/isuppli_car_tech_2009/)

*Bluetooth* car speakerphones are a booming market. In 2007, the *Bluetooth* after-market, including car speakerphones and GPS units was around 25 million units, a 54 percent increase from 2006, according to IMS Research. MSNBC, “Tools of the Road to Help You Go Hands-Free”, July 1, 2008  
<http://www.msnbc.msn.com/id/25459060/>

*Bluetooth* technology is slowly gaining ground in the automotive market with its growing awareness and use. Wider application of *Bluetooth* enabled devices such as headsets, cellular handsets and car kits is the reason for the emergence of this short-range technology as a consumer-demanded feature. Implementation of hands-free driving legislation in many countries is also one of the key factors promoting growth in the global *Bluetooth* enabled devices market. Global Industry Analysts press release, April 2008  
[http://www.emediawire.com/releases/handset\\_headset\\_pc/bluetooth/prweb900994.htm](http://www.emediawire.com/releases/handset_headset_pc/bluetooth/prweb900994.htm)

According to a survey of its female customers by LeaseTrader.com (a company that helps people transfer car leases) *Bluetooth* technology is the second most demanded functionality women want in new cars (second behind fold-down backseats for more storage). LeaseTrader.com press release, October 17, 2007  
<http://www.theautochannel.com/news/2007/10/16/067403.html>

In 2007 around 7M new vehicles are estimated to include *Bluetooth* technology. In 2012, around a third of all light vehicles sold are forecast to contain *Bluetooth* technology. IMS Research, *The Worldwide Market for Bluetooth Technology*, September 2007

Sales of automotive aftermarket *Bluetooth* devices have grown dramatically over the last 12 months and are forecast to exceed 40M units during the next couple of years. IMS Research, *The Worldwide Market for Bluetooth Technology*, September 2007

### *Gaming*

In 2007, *Bluetooth* gaming equipment (i.e., Nintendo Wii and Sony PS3) leapt to the second largest *Bluetooth* device category by volume, more even than headsets. IMS Research, *The Worldwide Market for Bluetooth Technology*, September 2007

### *Mobile Internet Devices*

ABI Research expects to see *Bluetooth* technology reach a 95% penetration rate (in mobile internet devices) by the end of 2008. ABI defines these devices as “the new class of Internet-connected products offering ‘always-on’ Web browsing, photography and video, navigation, games, social networking and voice communications.” While many MIDs will include voice capabilities, they are larger than mobile phones, and for convenience some users will carry a low-cost phone as well. However many consumers still want an all-in-one device, and the handset/headset configuration enabled by *Bluetooth* technology will meet their needs. That will be one of the main rationales for its early adoption in MIDs.

ABI Research press release, September 2008

<http://www.abiresearch.com/press/1227->

[Bluetooth+Will+Quickly+Become+a+Critical+Feature+of+Mobile+Internet+Devices](http://www.abiresearch.com/press/1227-Bluetooth+Will+Quickly+Become+a+Critical+Feature+of+Mobile+Internet+Devices)

### *Personal Media Player*

The market for *Bluetooth* digital personal media players (PMPs) is expected to top 5M in 2007, a figure that is expected to more than double the following year.

IMS Research, *The Worldwide Market for Bluetooth Technology*, September 2007

### *PC*

*Bluetooth* penetration in the notebook sector was estimated at just over a third in 2006. Penetration is projected to increase significantly over the next five years passing the 75% mark during 2012.

IMS Research, *The Worldwide Market for Bluetooth Technology*, September 2007

### *Medical, Health and Wellness*

ABI Research forecasts that by 2012 the market for ULP enabled PAN sensors in this area (sports, exercise, health and wellbeing) will represent nearly 140 million units. The technology research firm expects sports and exercise applications to take the early lead in this market.

ABI Research press release, October 16, 2007

<http://www.abiresearch.com/abiprdisplay.jsp?pressid=958>

### *Silicon*

ABI Research forecasts that by 2011 there will be over 146 million ICs that combine host processor and *Bluetooth* functionality, while *Bluetooth*/Wi-Fi and *Bluetooth*/UWB combination ICs are likely to see 61 million and 59 million IC shipments in 2011 respectively.

ABI press release, August 17, 2007

<http://www.abiresearch.com/abiprdisplay.jsp?pressid=912>

### *NFC*

IMS forecasts that NFC will feature in over 30,000 non-handset Bluetooth devices in 2013.

Nikkei Electronics, “Contactless Possibilities Endless for NFC, says IMS Research”, March 7, 2008

[http://techon.nikkeibp.co.jp/english/NEWS\\_EN/20080307/148646/](http://techon.nikkeibp.co.jp/english/NEWS_EN/20080307/148646/)