

## 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)

According to results from In-Stat's 2006 Residential Technology Survey, 50% of average US consumers claimed to be "Extremely Familiar" with *Bluetooth* technology, compared to a mere 2% of respondents in a 2005 survey.

In-Stat press release, July 12, 2006

<http://www.instat.com/press.asp?ID=1704&sku=IN0602965MI>

### *Mobile Phones and Headsets*

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>

According to the NPD Group, about half of all phones sold in Q4 (2006) supported *Bluetooth* wireless technology.

"Half the US Bought Mobile Phones in 2006", *eMarketer.com*, March 30, 2007

<http://www.emarketer.com/Article.aspx?1004742>

By the end of the decade, handsets and headphones will account for three quarters of shipments of *Bluetooth* enabled equipment.

*IMS Research News*, October 2006

According to In-Stat, the primary driver for *Bluetooth* handsets is the desire to connect to *Bluetooth* mono headsets, nearly 33 million of which shipped in 2005. This figure is expected to increase to over 55 million in 2006.



In-Stat press release, July 12, 2006  
<http://www.instat.com/press.asp?ID=1704&sku=IN0602965MI>

GSM phones have adopted *Bluetooth* technology most rapidly, with one-third of GSM handsets in 2005 shipping with *Bluetooth* technology.

In-Stat press release, July 12, 2006  
<http://www.instat.com/press.asp?ID=1704&sku=IN0602965MI>

According to Strategy Analytics, global sales of *Bluetooth* headsets reached 33 million units in 2005. The research firm also reported that total wholesale revenues will likely reach \$2 million in 2007, which would make it the world's largest accessory market for mobile devices.

Strategy Analytics press release, June 19, 2006

Forecasters expect *Bluetooth* technology's "attach rate" in the cell phone market to rise above 35% this year (2006), then 45% and 55% in succeeding years.

"Toothsome Projects", *Barron's Online*, April 27, 2006

According to the NPD Group, among the most popular mobile phone features, sales of *Bluetooth* enabled devices have increased significantly in the last year. The number of handsets sold equipped with this short-range wireless technology have risen dramatically from 9 percent in the second quarter of 2005 to 18 percent in the first quarter of this year (2006).

"Mobile Phone Sales Up 11% In Q1; *Bluetooth* devices 18% of all new sales", *RTO Online.com*, April 9, 2006  
<http://www.rtoonline.com/Content/article/May06/USMobilePhoneShipments050906.asp>

Mobile phones enabled with *Bluetooth* technology are becoming a burgeoning market, as In-Stat market research projects that by 2009 more than 66 percent of the 900 million mobile phone handsets sold that year will include *Bluetooth* technology.

"3GSM: Broadcom, Freescale Team on *Bluetooth* Phones", *Electronic News*, February 14, 2006  
<http://electronicsweekly.com/Articles/2006/02/14/37702/3GSMBroadcom,FreescaleteamonBluetoothphones.htm>

## *Automotive*

According to a survey of its female customers by Leastrader.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).

Leastrader.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

SBD's telematics team provides practical recommendations for vehicle manufacturers to bridge the life-cycle gap between the automotive and consumer electronics industries. In its report, SBD recommends using open

standards from the consumer electronic world and identifies the use of *Bluetooth* technology and USB as the core technologies for integrating, respectively, mobile telephones and entertainment devices.  
European Telematics and ITS: Portable device integration – strategies for the automotive industry, May 2006  
[http://www.sbd.co.uk/assets/940\\_Portable\\_devices\\_report\\_SAMPLE.pdf](http://www.sbd.co.uk/assets/940_Portable_devices_report_SAMPLE.pdf)

According to a study from the Polk Center for Automotive Studies, three quarters of respondents (77 percent) will consider purchasing the technology, which is currently offered on many luxury brands (of automobiles). Similarly, 85 percent of luxury driving respondents will consider *Bluetooth* technology and two thirds (66 percent) of those considering this platform agree that the availability of the technology will make them consider a vehicle more seriously.

R.L. Polk & Co. press release, May 17, 2006  
[http://usa.polk.com/News/LatestNews/2006\\_0517\\_phones.htm](http://usa.polk.com/News/LatestNews/2006_0517_phones.htm)

“Our automotive clients are telling us they expect more than three quarters of new luxury vehicles to be equipped with *Bluetooth* technology by 2008. If things go well, that’s nearly two million luxury units over the next couple of years that will be equipped with convenient hands-free communication devices.”

Lonnie Miller, Managing Director of the Polk Center for Automotive Studies  
R.L. Polk & Co. press release, May 17, 2006  
[http://usa.polk.com/News/LatestNews/2006\\_0517\\_phones.htm](http://usa.polk.com/News/LatestNews/2006_0517_phones.htm)

According to Frost & Sullivan, the market for *Bluetooth* equipped vehicles is expected to grow at a compound annual growth rate of 27.1 per cent from 2005 to 2010.

“Carmakers Accelerate Wi-Fi Adoption”, *vnunet.com*, February 9, 2006, Robert Jacques  
<http://www.vnunet.com/vnunet/news/2150030/europe-revs-car-wi>

ABI Research found that the *Bluetooth* automotive market grew an unprecedented 141 percent during 2005 when compared to 2004 and that the signs of this growth show to be a long term prospect. Awareness, familiarity and use of *Bluetooth* technology within the wider consumer base has grown significantly, and this has resulted in *Bluetooth* technology becoming a feature demanded by consumers, rather than pushed by manufacturers.

ABI Research press release, February 1, 2006  
<http://www.abiresearch.com/abiprdisplay.jsp?pressid=591>

### *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

### *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

### *Stereo Audio*

The market for *Bluetooth* enabled Audio/Hi-Fi equipment is expected to grow from around 2 million units shipped in 2005 to around 9 million in 2010.

IMS Research, *Wireless Technologies in In-House Entertainment*, February 2006

### *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

The market for *Bluetooth* enabled notebooks is expected to grow from around 14 million units shipped in 2005 to around 88 million in 2010.

IMS Research, *Wireless Technologies in the PC Environment*, February 2006

### *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>

According to ABI Research, *Bluetooth* enabled products are now in the hands of one billion consumers worldwide with weekly shipments of the wireless devices continuing at a pace of 12 million per week.

Bluetooth SIG press release, November 14, 2006

[http://www.bluetooth.com/Bluetooth/Press/SIG/BLUETOOTH\\_WIRELESS\\_TECHNOLOGY\\_SURPASSES\\_ONE\\_BILLION\\_DEVICES.htm](http://www.bluetooth.com/Bluetooth/Press/SIG/BLUETOOTH_WIRELESS_TECHNOLOGY_SURPASSES_ONE_BILLION_DEVICES.htm)

With *Bluetooth* technology's attach rate to total cellular handsets nearing 50 percent in 2006, the integration of Wi-Fi with *Bluetooth* technology onto a single chipset could significantly drive Wi-Fi's uptake into cellular handsets. With dual-mode Wi-Fi/cellular handset shipments expected to reach almost 27M in 2007 (up from 6M in 2006), combination *Bluetooth* and Wi-Fi solutions could really help spike the Wi-Fi attach rate.

In-Stat information alert, June 1, 2007

<http://www.instat.com/infoalert.asp?Volname=Vol.%20%23%20158>

In five years' time, 100M each of notebooks, portable digital media players, and games appliances are predicted to have *Bluetooth* connectivity.



*IMS Research News*, October 2006

Shipments of equipment enabled by *Bluetooth* technology have increased tenfold in three years, to over 250 million units in 2005. Shipments are predicted to double this year, and are forecast to exceed one billion in 2008 and 1.5 billion by 2010.

*IMS Research News*, October 2006

ABI Research concludes that the market for *Bluetooth* radios will grow by 71% to a level just over 500 million radio shipments in 2006.

ABI press release, March 16, 2006

<http://www.abiresearch.com/abiprdisplay.jsp?pressid=614>

The *Bluetooth* market will grow at a compound annual rate of over 40% between 2004 and 2011, and equipment shipments are expected to break the 1 billion mark by 2009.

ABI press release, March 16, 2006

<http://www.abiresearch.com/abiprdisplay.jsp?pressid=614>

According to IMS Research, *Bluetooth* technology shipment figures now top 10 million units per week.

IMS press release, February 22, 2006

<http://www.mobiletechnews.com/info/2006/02/22/122319.html>

Strategy Analytics asserts that the market for *Bluetooth* enabled devices grew to more than 272 million units in 2005, twice the number of units shipped globally in 2004.

Strategy Analytics press release, January 12, 2006

<http://www.strategyanalytics.net/default.aspx?mod=PressReleaseViewer&a0=2735>