

Global HMD (Head Mounted Display) and Smartwatch Market: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study on the global HMD (Head Mounted Display) and Smartwatch market with the following conditions:

1. Research period: February to June, 2013
2. Research target: Manufacturers of mobile phones, smart phones, computers, domestic semiconductors, and other related organizations
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/email, and literature research

What are HMD, Smartwatches?

HMD (head mounted display) in this research indicates a display device wearable on the head and has either one or two small displays with lenses and semi-transparent mirrors embedded to look like a pair of eye-glasses, thus they are sometimes called smart goggles. With rechargeable batteries and wireless functions embedded, users are able to communicate with smart phones, from which it displays information or to operate it by voice input.

Smartwatch in this research indicates computerized wrist watch that can communicate with a smart phone and has various functions including accepting emails, displaying information, detecting or collecting vital data such as the user's body temperature or blood pressure perceived by the embedded sensors.

◆ Key Findings

■ Wireless, Now Most Popular Method to Communicate with Smart Phones, Enabling of Self-Care and Health Care Services Expected

There are increasing numbers of electronic devices embedded with wireless functions to communicate with smart phones using Bluetooth, WiFi, and NFC. Such a trend has increased wearable terminals like HMD and smartwatches, which are expected to be used in and develop to self-care and health care services by detecting and analyzing user's vital data collected by sensors embedded within such terminals.

■ Forecast on Global Market of HMD Reaches 450,000 Devices in 2013, and Expected to Attain 10 Million in 2016

The global market size of HMD, head mounted displays, is anticipated to reach 450,000 based on the shipment volume from manufacturers. The market is likely to fully launch at the end of 2014 and later, as companies start entering the market. HMD market is estimated to be around 10 million in 2016.

■ **Forecast on Global Market of Smartwatches Reaches 10 Million in 2013, and Expected to Achieve 100 Million in 2016**

The global market size of smartwatches is anticipated to reach 10 million based on the shipment volume from manufacturers. The market is likely to accept companies from different industries so that it is expected to achieve around 100 million in 2016.

◆ **Report format:**

Published report: “Smart Phone-Aligned Services and Devices Market 2013”

Issued on: July 24, 2013

Language: Japanese

Format: 294 pages in A4 format

Price: 199,500 yen (9,500 yen of consumption tax shall be charged for the sales in Japan.)

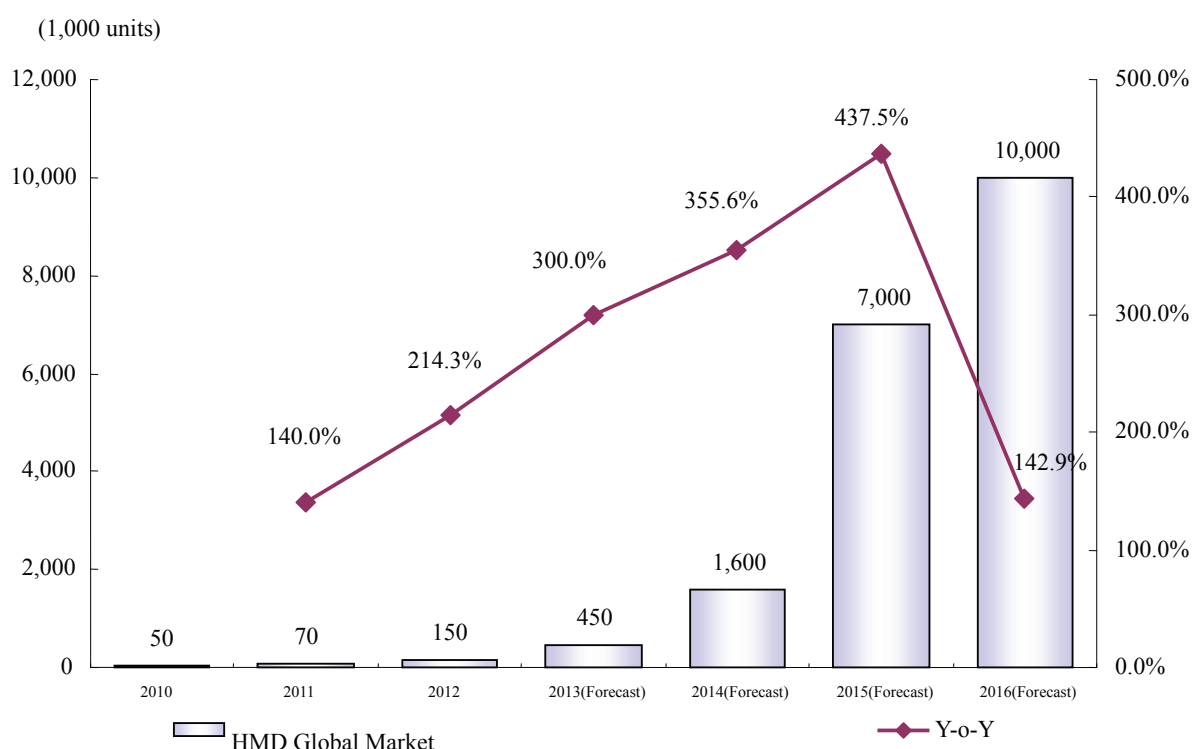
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure & Table 1: Transition and Forecast on Size of Global HMD Market**



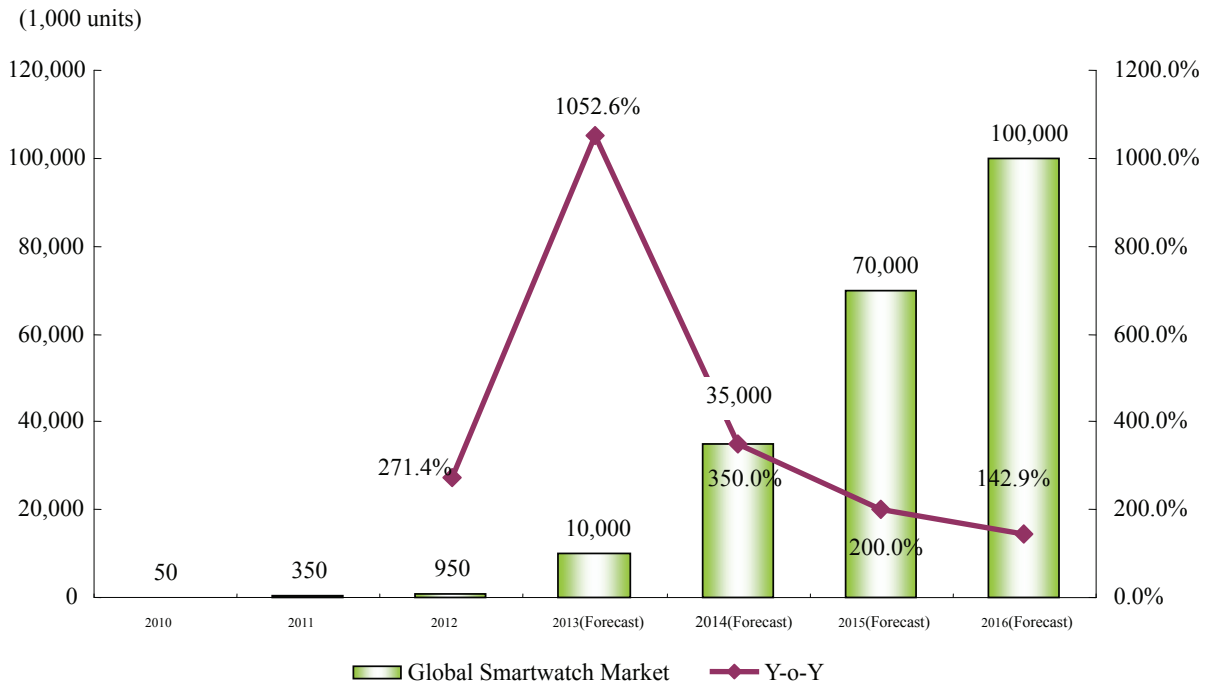
	2010	2011	2012	2013(Forecast)	2014(Forecast)	2015(Forecast)	2016(Forecast)
Global HMD Market	50	70	150	450	1,600	7,000	10,000
Y-o-Y		140.0%	214.3%	300.0%	355.6%	437.5%	142.9%

Notes:

Estimated by YRI

1. The figures are based on the shipment volume from the manufacturers.

■ **Figure & Table 2: Transition and Forecast on Size of Global Smartwatch Market**



	2010	2011	2012	2013 (Forecast)	2014 (Forecast)	2015 (Forecast)	2016 (Forecast)
Global Smartwatch Market	50	350	950	10,000	35,000	70,000	100,000
Y-o-Y			271.4%	1052.6%	350.0%	200.0%	142.9%

Estimated by YRI

Notes:

- The figures are based on the sales from the businesses.