

MARKET RESEARCH NOTE

Sizing the Opportunity for Auracast™ Broadcast Audio in Public Locations



STRATEGYANALYTICS
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About This Report

The Bluetooth Special Interest Group (SIG) commissioned Strategy Analytics to explore the potential size and shape of the nascent market for Auracast™ broadcast audio in public venues.

As a first step, Strategy Analytics conducted desk research, compiling the best available data on global venue counts from a variety of public and private resources. In addition, Strategy Analytics conducted a series of in-depth interviews to use as a market sizing input and add depth and richness to the analysis. A diverse cross section of venue owners and decision makers as well as selected industry leaders in consumer electronics and established assistive listening technologies were engaged. Strategy Analytics also spoke with professionals in the medical/audiological and hearing loss communities to bring a good mix of perspectives and cross-checked them through multiple independent sources where possible.

Those conversations, which are expanded on in this report, provided greater insight into today's available options for broadcast audio, the successes and pain points of those systems, plans in consideration, and prevailing attitudes on the future of Auracast™ broadcast audio.

Table of Contents

- About This Report 2
- Executive Summary 4
- Use Cases 5
- Public Venue Types 6
- Sizing the Public Venue Opportunity 7
 - Global Venue Count 7
 - Major Considerations for Estimating Adoption 8
 - Relevancy of Use Cases by Venue Type 8
 - Regional Regulatory Variations for Assistive Listening 9
- Conclusion 10



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Strategy Analytics, Inc.
Strategy Analytics is a global leader in supporting companies across their planning lifecycle through a range of syndicated and customized consumer and market research solutions that help build defensible, distinctive strategies to win in complex technology markets.

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Executive Summary

The release of **Bluetooth® LE Audio** introduced a new Bluetooth capability – Auracast™ broadcast audio. Auracast™ broadcast audio enables an audio transmitter to broadcast to an unlimited number of nearby Bluetooth audio receivers, enabling public locations – including airports, museums, and conference halls – to deliver audio experiences that will enhance occupant and visitor satisfaction and increase audio accessibility.

Across North America, Western Europe, and Asia Pacific, research done by Strategy Analytics identified more than 60 million public locations that could benefit from broadcast audio with 7 million of those having a clear *strength-of-fit* for deployment. Locations with high strength-of-fit are expected to adopt Auracast™ broadcast audio relatively soon, whereas low-to-mid strength-of-fit may see the potential benefit of implementing Auracast™ broadcast audio in the mid-to-long term. Decision makers will need to determine the most suitable audio use cases while understanding local regulatory compliance to leverage Auracast™ broadcast audio to provide audio accessibility for their customers.

The future is brimming with innovation in envisioned use cases as well as many augmented listening experiences that have not yet been imagined.

Learn more about [Auracast™ broadcast audio](#).



Use Cases

Auracast™ broadcast audio represents fertile ground for innovation that will, over time, produce numerous use cases not yet imagined.

The following list includes a mix of some of the most compelling near-term use cases.

- **Assistive Listening in Public Spaces**

Venues that deploy public address (PA) systems such as airports, cinemas, lecture halls, conference centers, places of worship, and more can provide a better audio experience by enabling visitors to receive the PA audio directly into their own Auracast™ enabled Bluetooth® headset or hearing device. When used in this manner, Auracast™ broadcast audio will function as a high-quality, low-cost, next-generation assistive listening system (ALS), improving the audio experience for visitors with and without hearing loss.

- **Assistive Listening at Public Counters**

Venues with service counters such as banks, retail shops, cinemas, and more can provide secure, 1:1 assistive listening support to visitors using their own Auracast™ enabled Bluetooth® hearing devices.

- **Silent TV Screens**

Venues that provide silent TV screens such as airports, gymnasiums, hotels, restaurants, and waiting rooms can offer a more satisfying watching experience by providing access to the program's audio for people using their own Auracast™ enabled Bluetooth® headsets or hearing devices.

- **Tour Systems**

Venues that provide guided group tours such as museums, convention centers, and tourist attractions can create a more compelling tour experience by enabling visitors to use their own Auracast™ enabled Bluetooth® headsets or hearing devices when participating in the tour.

- **Multi-Language Support**

Venues that support simultaneous interpretation services such as conference and meeting centers, or alternative language programming for video programming, can provide a more engaging audio experience and let participants use their own Auracast™ enabled Bluetooth® headsets or hearing devices to receive audio in their desired language.



Public Venue Types

The use cases available for Auracast™ broadcast audio are wide and expansive and so too are the locations that could benefit from this next-generation audio innovation. The following list includes some of the more common venues that stand to benefit from Auracast™ broadcast audio's ability to enhance the visitor experience.

- **Cinema:** Any place where movies are shown for public entertainment
- **Conference/Performance Center:** Any building or group of buildings used for meetings, events, or performances
- **Gym/Fitness Center:** Any place or club where people go to use machines, weights, and other exercise equipment
- **Hospital/Medical/Dental Office:** Any facility that provides medical treatment and care
- **Hotel/Restaurant/Pub:** Any establishment that provides lodging, meals, entertainment, or alcoholic beverages
- **Museum/Tourist Attraction:** Places of interest for viewing or visiting locations with inherent cultural or historical significance
- **Office Space:** Any building or part of a building typically used as an office
- **Place of Worship:** Any church, mosque, temple, or other building where people attend religious services
- **Retail/Service Location:** Any place where people go to purchase goods and/or services
- **School/Campus:** Any public or private facility used for education
- **Stadium/Arena:** Any large building with an open area surrounded by seating that is used for sporting events, concerts, and other major events
- **Transportation Hub/Center:** Transportation hubs, such as airports, train stations, bus stations, etc. that help facilitate travel for thousands of people every day

Sizing the Public Venue Opportunity

The first step in sizing the opportunity for Auracast™ broadcast audio is to collate the total global public venue counts that are candidates for implementing Auracast™ broadcast audio use cases. Three key global regions were examined – North America, Western Europe, and Asia Pacific.

Global Venue Count

Across the three global regions, Strategy Analytics estimates there could be over 60 million locations that stand to benefit from deploying Auracast™ broadcast audio.

60
MILLION

locations stand to benefit from deploying Auracast™ broadcast audio.

Total Number of Potential Candidate Venues

As of 2022

	Total	N. America	W. Europe	Asia Pacific
Total	61,367,297	3,089,110	6,787,314	51,490,873
Cinemas	45,777	8,095	8,460	29,222
Conference/Convention/ Performance Centers	5,701	2,138	2,253	1,309
Gyms/Fitness Centers	380,720	46,663	17,949	316,108
Hospitals/Medical/ Dental Offices	3,141,463	475,653	200,932	2,464,878
Hotels/Restaurants/Pubs	9,179,103	845,734	983,779	7,349,590
Museums/Tourist Attractions	73,685	35,194	25,231	13,261
Office Spaces	297,190	60,483	77,757	158,950
Places of Worship	1,057,515	323,433	291,086	442,997
Retail/Service Locations	45,823,001	1,132,801	4,996,881	39,693,319
Schools/Campuses	1,321,545	149,154	173,901	998,491
Stadiums/Arenas	2,935	957	956	1,022
Transportation Hubs/Centers	38,660	8,804	8,129	21,727

Table 1: Total number of potential candidate venues as of 2022. Source: Strategy Analytics, 2021

Major Considerations for Estimating Adoption

Given the market situation, there are several factors that play into estimating the anticipated penetration of Auracast™ broadcast audio. To accurately estimate the adoption level across different regions, different use cases, and different venue types, it requires looking at regional differences in readiness to deploy, regulatory requirements for use cases related to assistive listening, as well as suitability differences in Auracast™ broadcast audio use cases by different public venue types.¹

Relevancy of Use Cases by Venue Type

The number of venues likely to deploy an Auracast™ broadcast audio infrastructure is vast. Suitable locations encompass transportation hubs, cinemas, conference centers, performance centers, gyms, fitness centers, hospitals, medical offices, dental offices, hotels, restaurants, pubs, places of worship, museums, tourist attractions, office spaces, retail and service locations, schools, and stadiums.

The *strength-of-fit* for Auracast™ broadcast audio use cases (Table 2) can vary considerably based on any number of factors, including, but not limited to: willingness to adopt, number of visitors impacted, ease of installation, amount and importance of audio being provided through public address, criticalness of information, and intended audience.

Auracast™ Broadcast Audio Use Case Strength-of-fit

	By Venue Type											
	Cinemas	Conference/Performance Centers	Gyms/Fitness Centers	Hospitals/Medical/Dental Offices	Hotels/Restaurants/Pubs	Museums/Tourist Attractions	Office Spaces	Places of Worship	Retail/Service Locations	Schools/Campuses	Stadiums/Arenas	Transportation Hubs/Centers
Assistive Listening in Public Spaces	High	High	Low	High	Low	High	Medium	High	Medium	High	Medium	High
Assistive Listening at Public Counters	High	High	Medium	High	High	High	Low	Low	High	Medium	High	High
Silent TV Screens	Low	High	High	High	High	Medium	Medium	Low	Medium	Medium	Medium	High
Tour Systems	Low	Medium	Medium	Low	Low	High	Low	High	Low	High	Low	Low
Multi-Language Support	High	High	Low	Medium	High	High	Medium	High	Low	Medium	Medium	High

Table 2: Auracast™ broadcast audio use case strength-of-fit by venue type. Source: Strategy Analytics, 2021

¹ Regulatory issues are not covered here. Please consult your local officials and advocacy groups for more information on regional assistive listening regulation and compliance requirements.



It is worth noting that some venues may enable multiple Auracast™ broadcast audio use cases. Examples include public TVs that support both audio for silent screens and alternative language as well as cinemas that offer hearing augmentation, audio description², and multi-language. These are a few ways Auracast™ broadcast audio will integrate into everyday life and enhance private interaction with audio in public venues.

Regional Regulatory Variations for Assistive Listening

One of the key drivers in the adoption of Auracast™ broadcast audio for assistive listening will be regional regulation, compliance, and level of enforcement. Regulatory guidelines and the extent they are enforced varies greatly in different regions.

In Europe and the UK, adherence to regulations has been significant over the years relative to the US. We see higher levels of compliance with current technologies (i.e., loop systems, FM, and IR) in Europe. This level of enforcement and compliance should extend to Auracast™ broadcast audio.

In the US, while regulatory compliance and advocacy from consumers of audio accessibility is building, we expect to see lower levels of regulatory guidelines and compliance in the near term. Asia Pacific is considered to have the least amount of regulatory requirements in this area. Overwhelmingly, a large percentage of venues in the US and Asia Pacific are currently out of compliance with regulatory guidelines for assistive listening. The release of new technologies like Auracast™ broadcast audio may drive further implementation. While it is true that compliance is largely unpoliced and unenforced, the dramatically lower implementation and support costs to ensure compliance, along with the potential perks of other Auracast™ broadcast audio use cases, could drive significant change.

In summary, regulatory guidelines, enforcement, and advocacy for assistive listening use cases will enable certain venues and regions to adopt the technology faster than others.

² Audio description is a service for people who are blind or visually impaired which allows them to access the visual experience through audio narration.

Conclusion

While audio can be time-shifted, shared, shaped, translated, substituted, amplified, and filtered in ways that were not imaginable 150 years ago, the future holds incredible promise to further assist those with hearing loss, enhance audio in noisy environments, and provide private and/or custom listening experiences. Auracast™ broadcast audio is an emerging technology that has the potential to help fulfill this promise and enable audio innovation that delivers additional consumer benefits not yet imagined.

From a venue-enablement perspective, the Total Addressable Market (TAM) will be dictated by the number of available venues across many candidate categories. While the growth trajectory is hard to predict in the early days of ecosystem development, the initial wave of public venues looking to implement Auracast™ broadcast audio will now find solutions to be within their grasp.

Like any net-new capability or solution introduced to the market, firm projections and specifics regarding adoption rates and trends are difficult to offer at this time. However, Strategy Analytics anticipates a vibrant ecosystem will emerge, with the characteristic ability of the Bluetooth® standard, to wring out costs. Silicon and initial technology software stacks are now becoming available for modules and end-product vendors to work with. The long-term outlook is bright in terms of addressing both end users and venue pain points. Device readiness and, critically, the sheer volume of prospective candidate venues promise strong growth in the coming years.

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