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In 2018, nearly 4 billion devices will ship with Bluetooth® technology. Thanks to Bluetooth mesh networking and the momentum of Bluetooth 5, Bluetooth is now poised as an industrial-grade connectivity solution that will be the wireless constant in the Internet of Things (IoT) for decades to come.

Since its inception 20 years ago, Bluetooth has continuously evolved, expanding the universe of innovative ways for things to connect — driving innovation and creating new markets. Whether it is a connection for wireless audio, wearable devices, tracking assets, or automating buildings, Bluetooth is the innovative force creating new consumer, commercial, and industrial markets.

It’s an honor to be part of such an incredible community.

Mark Powell | Executive Director | Bluetooth SIG, Inc.
The Bluetooth SIG manages three charter programs:

**Specification**
We expand the capabilities of Bluetooth technology by facilitating the collaboration of our member companies to create new and enhanced Bluetooth specifications.

**Qualification**
We drive Bluetooth interoperability through a world-class member product qualification program that includes access to the Bluetooth technology and trademark license agreements.

**Promotion**
We grow the Bluetooth brand by increasing the awareness, understanding, and adoption of Bluetooth technology.
Supported by updated forecasts from ABI Research*, the Bluetooth Market Update examines:

- The growth and health of the Bluetooth SIG member community
- The trajectory of Bluetooth technology, including trends and forecasts for each radio version and the key Bluetooth solution areas
- New trends in traditional Bluetooth markets as well as forecasts in emerging markets in which Bluetooth is taking on an expanded role

The Bluetooth Market Update is intended to help global IoT decision makers stay up-to-date on the role Bluetooth technology can play in their technical roadmaps and markets.

The trends identified in the Bluetooth Market Update highlight the direction of the Bluetooth member community and technology as Bluetooth continues its expansion from a personal communication solution to an industrial-grade connectivity engine.

*Unless otherwise indicated, numbers are derived from ABI Research. Data files include: Wireless Connectivity Technology Segmentation - Addressable Markets, Indoor Positioning RTLS Technology Infrastructure Applications. Forecasts do not constitute a promise to ship.
Over the last 20 years, Bluetooth has been pivotal in enabling compelling customer experiences. It has been one of the key technologies underpinning the consumer wireless revolution. The Bluetooth community continues to grow and extend as the technology enhances its specification in order to retain its prominent position in future markets.

Stuart Carlaw
Chief Research Officer,
ABI Research

Bluetooth is more than a technology. It’s also a community.
An incredible community of more than 33,000 member companies driven to continually advance wireless connectivity to create a better world.
Membership at the Bluetooth SIG continues to experience strong growth. By the end of 2017, the community grew to over 33,000 companies spread evenly across all regions of the world, highlighting the true global footprint of Bluetooth technology.

Source: Bluetooth SIG, as of 31 Dec 2017
The hard work and commitment of our working groups and committees deliver continuous innovation. With the help of 2,004 new group and committee participants in 2017, the Bluetooth SIG working groups delivered nearly one new or updated specification each month.

These groups and committees are the reason Bluetooth technology is the global wireless standard powering the Internet of Things.

**Working Groups are the backbone of the Bluetooth SIG, bringing specifications to life.**

- **15 Working Groups**
- **70 Active Specification Projects**
- **11 New/Updated Specifications in 2017**

**2,004 New group and committee members in 2017**

Learn more about working groups
Bluetooth 5

Only nine months after the release of the latest version of the Bluetooth core specification, many of its new features became commercially available in products from the world’s leading smartphone vendors. This sets the stage for the widespread adoption of those features in peripherals, beacons, and other key IoT enabling devices.

Bluetooth 5 found its way into high-volume consumer products faster than any of our previous technology releases. Now, less than a year after its initial release, Bluetooth 5 is available from all the leading smartphone vendors on the planet.

Mark Powell
Executive Director | Bluetooth SIG
Bluetooth mesh

In 2017, the Bluetooth SIG added mesh networking capability to Bluetooth. The mesh topology, now available on Bluetooth Low Energy, enables the creation of large-scale device networks and is ideally suited for control, monitoring, and automation systems where tens, hundreds, or thousands of devices need to reliably and securely communicate with one another.

We feel like we are changing the world. We feel very strongly that we've just delivered a third Bluetooth revolution... I think we've taken a significant part of the world by surprise because Bluetooth has always been considered a small personal system. And suddenly we are coming out with something that’s so complete, so well-performing, and addressing completely new territories.

*Szymon Slupik*
Silvair CTO and Bluetooth SIG Mesh Working Group Chair

Learn more about Bluetooth mesh

Bluetooth mesh adoption: 18 July 2017
Thanks to a membership community driven to expand the technology's capabilities to address new markets, Bluetooth shipments have maintained uncommonly consistent growth, and show no signs of slowing down.

**Total Bluetooth Device Shipments**

Numbers in billions

<table>
<thead>
<tr>
<th>Year</th>
<th>Shipments</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>2.4</td>
</tr>
<tr>
<td>2014</td>
<td>2.7</td>
</tr>
<tr>
<td>2015</td>
<td>3.0</td>
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<tr>
<td>2016</td>
<td>3.2</td>
</tr>
<tr>
<td>2017</td>
<td>3.6</td>
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<tr>
<td>2018</td>
<td>3.9</td>
</tr>
<tr>
<td>2019</td>
<td>4.2</td>
</tr>
<tr>
<td>2020</td>
<td>4.6</td>
</tr>
<tr>
<td>2021</td>
<td>4.9</td>
</tr>
<tr>
<td>2022</td>
<td>5.2</td>
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12% compound annual growth rate (CAGR) over 10 years
More than just a radio technology, Bluetooth provides full stack, fit-for-purpose solutions aimed at addressing specific connectivity needs.
As the demands of the IoT continue to grow, so does Bluetooth. After first addressing point-to-point connectivity, Bluetooth expanded into broadcast communications to enable indoor positioning and location services. Now, Bluetooth mesh networking has propelled Bluetooth into emerging markets in need of a reliable wireless solution to establish large-scale device networks.

<table>
<thead>
<tr>
<th>solution</th>
<th>topology</th>
<th>radio</th>
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<tr>
<td>audio streaming</td>
<td>point-to-point</td>
<td>Bluetooth Basic Rate/Enhanced Data Rate (BR/EDR)</td>
</tr>
<tr>
<td>data transfer</td>
<td>point-to-point</td>
<td>Bluetooth Low Energy</td>
</tr>
<tr>
<td>location services</td>
<td>broadcast</td>
<td></td>
</tr>
<tr>
<td>device networks</td>
<td>mesh</td>
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Wireless headsets - The original device of the wireless audio market, Bluetooth headsets are now a must-have accessory for mobile phones.

Wireless speakers - Whether it's a high-fidelity entertainment system in the home or a portable option for the beach or park, there's a speaker for any occasion in every imaginable shape and size.

In-car systems - Bluetooth in-car infotainment systems pair with driver smartphones to enable hands-free audio streaming and calling, allowing drivers to keep their focus on what matters most.

The point-to-point topology available on Bluetooth BR/EDR is optimized for audio streaming, making it the standard-bearer in wireless audio.

Bluetooth Device Shipments
numbers in millions

880 million
annual shipments

<table>
<thead>
<tr>
<th>Year</th>
<th>Shipments (in millions)</th>
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<tbody>
<tr>
<td>2013</td>
<td>400</td>
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<tr>
<td>2014</td>
<td>480</td>
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<td>2015</td>
<td>560</td>
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<td>2016</td>
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<td>2017</td>
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<td>2019</td>
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</tr>
<tr>
<td>2020</td>
<td>1,070</td>
</tr>
<tr>
<td>2021</td>
<td>1,160</td>
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<td>2022</td>
<td>1,230</td>
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The Bluetooth Low Energy point-to-point topology is optimized for very low-power data transfer, making it ideal for connected device products.

**Sports & fitness** - Bluetooth powers wearables like fitness trackers and smart watches that are showing up on wrists everywhere to monitor steps, exercise, activity, and sleep.

**Health & wellness** - From blood pressure monitors to portable ultrasound and x-ray imaging systems, Bluetooth technology helps people track and improve their overall wellbeing, while making it easier for healthcare professionals to provide quality care.

**PC peripherals & accessories** - A driving force behind Bluetooth is freedom from wires. Whether it’s a keyboard, trackpad, or mouse, consumers no longer need wires to stay connected.
The broadcast topology available on Bluetooth Low Energy is ideally suited for enabling indoor positioning and location services.

**Point-of-interest information** - Retailers were among the first to adopt point-of-interest (Pol) beacons. Smart cities are now discovering how Pol beacons can improve the quality of life for citizens and enhance the visitor experience.

**Indoor navigation** - Bluetooth beacon-based indoor navigation and way-finding solutions have quickly become the standard way to overcome indoor coverage challenges that GPS can't address.

**Asset and item tracking** - Bluetooth beacons power the rapidly growing asset tracking and item finding markets, from inexpensive personal item tracking solutions to large-scale asset tracking solutions found in hospitals and factory floors.

**Space utilization** - Bluetooth beacon solutions are being deployed within office buildings, airports, exhibition centers, and even on city streets around the world to enable building owners and city planners to better understand how space is being used.
The mesh topology on Bluetooth Low Energy is optimized for creating large-scale device networks.

Control systems - Bluetooth mesh is quickly being adopted as the wireless communications platform of choice in a number of control systems, including lighting control solutions for the smart building and smart industry markets.

Monitoring systems - Bluetooth wireless sensor networks (WSN) are monitoring light, temperature, humidity, and occupancy to improve employee productivity, lower building operating costs, or better meet condition and maintenance requirements of production equipment to reduce unplanned downtime.

Automation systems - Bluetooth enables the automatic, centralized control of a building’s essential systems, including heating, ventilation and air conditioning (HVAC), lighting, and security to harness energy savings, lower operating costs, and improve the life span of a building’s core systems.
Point-to-point is still on the rise

Despite Bluetooth technology’s expansion to support a wider range of topologies and emerging use cases, the use of Bluetooth for audio streaming and data transfer continues to grow, with annual shipments expected to double in the next five years.

Location services have the steepest 5-year growth forecast

Bluetooth indoor positioning and location services are poised to be the fastest growing solution area. Bluetooth based location solutions are increasingly deployed by smart buildings and venues around the world to enable point-of-interest solutions, way finding, asset tracking, and space utilization.

Device network solutions are predicted to grow rapidly

The launch of Bluetooth mesh has accelerated the growth of device network solutions. Lighting control systems and wireless sensor networks are two use cases driving the increase in device network implementations.

Bluetooth location services and device networks are forecasted to account for 30% of all non-phone/tablet/pc Bluetooth devices by 2022.

The introduction of new capabilities for new solutions ensures steady growth and penetration in new markets.

*Phone, tablet, and PC devices not included
Demand for low energy spurs rapid growth in Low Energy single-mode chips

The rapid adoption of connected device solutions across multiple markets and the accelerated deployment of location services are driving swift momentum in Bluetooth Low Energy single-mode chip solutions.

Multi-purpose functionality is driving sharp growth in dual-mode chips

Since the 2010 release of Bluetooth Low Energy, shipments of dual-mode Bluetooth chips have followed a steep growth trajectory. By 2022, 97% of all Bluetooth chips are expected to contain Low Energy technology.

The wireless audio community continues to leverage the streaming capabilities of Bluetooth BR/EDR, and increasingly turns to dual-mode chips to accommodate multiple use cases within audio devices.
Connection drives innovation. Innovation creates markets.

For two decades, Bluetooth technology has been creating connections that power innovation, establish new markets, and push the limits of wireless communication worldwide.
Phones, tablets, and PCs have become portals through which people experience every thing and every place. And Bluetooth technology is native in all of them.

With over 2 billion of these Bluetooth devices expected to ship in 2018, industry leaders are increasingly turning to Bluetooth to power their IoT solutions.
Bluetooth Device Shipments
numbers in billions

2.05 billion
annual shipments

100% of smartphones, tablets, and laptops shipped in 2018 will include Bluetooth

1.73 1.9 2.0 1.96 2.02 2.05 2.08 2.13 2.16 2.18
Rapid adoption of Bluetooth 5 in smartphones

The latest version of the Bluetooth core specification found its way into its first smartphone faster than any previous release, further accelerating the widespread deployment of connected devices, beacons, and key IoT enabling solutions.

The trend to design out the audio jack continues

The proven reliability of Bluetooth audio has inspired smartphone manufacturers to design the audio jack out of the phone. This trend signals increased confidence in Bluetooth as a complete wire replacement and positions Bluetooth as the default way to listen to audio.

Smartphones become central in industrial and commercial use cases

The phone is emerging as a provisioner and central tool for new commercial and industrial use cases such as location services and building automation, making Bluetooth even more essential in mobile devices.

Device pairing becomes even easier

Major device vendors are enhancing the discovery and pairing experience and making a simple process even easier.

Learn more about the phone, tablet & PC market
Stripping away the hassle of wires on headsets, speakers, and home entertainment devices, Bluetooth offers consumers reliable, convenient access to their music and entertainment.

Bluetooth is now synonymous with the wireless audio and entertainment market and has forever changed the way we consume media and experience the world.
8 out of 10 speakers will include Bluetooth by the end of 2022.

100% of wireless game controllers shipped in 2018 will include Bluetooth.

3x growth in annual volume in the smart speaker market by the end of 2022.

1.2 billion annual shipments
The transition to wireless speakers is almost complete

Steady growth in portable speakers, soundbars, and home theaters signal confidence in Bluetooth quality and reliability. By 2022, 80% of all speakers will include Bluetooth technology.

Headsets, headphones, and earbuds lead market growth

Wireless headsets, headphones, and earbuds account for over 80% of the overall audio market. Notably, earbuds are starting to assert their dominance in the market.

Bluetooth is now dominant in game controllers, with TV remotes following the trend

The transition away from proprietary solutions to Bluetooth is underway in remote controls. Bluetooth is now the dominant wireless technology within game controllers, with TV remotes on a similar trajectory.

Smart speakers emerge in the connected home

A new category of speaker has emerged. The smart speaker market will double in annual volume by the end of 2018 and is forecasted to grow 3x by the end of 2022.

Hearing aids begin the transition to Bluetooth

2017 saw a steady stream of announcements from hearing aid manufacturers, trusting Bluetooth to provide medical-grade audio quality to the hearing-impaired community.

Learn more about the audio & entertainment market
A mainstay in the automotive market, Bluetooth technology has created connections between car and driver that have brought new levels of safety to our roads and more convenience to the in-car experience.

Bluetooth is the leading technology behind in-car infotainment systems that enable hands-free calling and audio streaming, and is now powering emerging use cases for keyless entry, in-vehicle wearables, and connected maintenance.
86% of new cars, trucks, and SUVs shipped worldwide in 2018 will come standard with Bluetooth.

4.5x growth in annual volume of under-the-hood Bluetooth devices shipped by 2022.

85% of Bluetooth automotive device shipments will be in-car infotainment systems in 2018.
Bluetooth is now standard equipment in most new cars

In 2018, 86% of all new vehicles will include Bluetooth connectivity.

In-car infotainment systems will account for 85% of Bluetooth automotive device shipments in 2018.

Wearables are becoming part of the automotive market

Bluetooth is powering in-vehicle wearables that monitor blood pressure, heart rate, and activity levels, triggering driver alerts when detecting signs of sleep or fatigue.

In-vehicle wearables will show strong growth in volume over the forecast period.

Smartphones are becoming the new key fob and more

The key fob migrating into the smartphone will enable a wider variety of convenience features, including proximity detection for automatic locking and unlocking, custom seat positioning, and the transfer of virtual keys to additional drivers.

Bluetooth is being adopted for under-the-hood solutions

Bluetooth wireless sensor systems simplify maintenance in both commercial fleets and consumer vehicles by transferring diagnostic information and alerts to service management solutions.

The volume of under-the-hood devices shipped each year is forecasted to grow 4.5x by 2022.

Learn more about the automotive market
From everyday household items to health and wellness devices that are changing the face of healthcare, Bluetooth is the common thread across the connected device market.

By connecting billions of everyday devices and enabling the invention of countless more, Bluetooth technology is helping transform the IoT vision into reality.
4x
growth in annual smartwatch shipments over the next 5 years

102m
Bluetooth enterprise wearables forecasted to ship in 2022

80m
Bluetooth consumer robots forecasted to ship in 2022
Consumer wearables are getting more sophisticated

A new breed of fitness devices that offer more specialized, multi-purpose functionality have emerged and will continue to experience consistent growth.

The smartwatch market has also become more diverse and will maintain its steady growth trajectory.

Medical grade devices are on a steady climb

Demand for healthcare providers to better administer medication, diagnose injuries, and receive critical updates on their patients' conditions is driving a 28% CAGR in Bluetooth healthcare wearables over the next 5 years.

Enterprise wearables gain significant traction

New enterprise use cases are driving a rapid growth in wearables in the workforce, including smart glasses and wearable scanners. With 102 million Bluetooth enterprise wearables forecasted to ship in 2022, enterprise wearables represent one of the fastest growing segments in the connected device market.

Consumer robotics are emerging in the home

Home helpers that vacuum, clean gutters, and even mow the lawn are here to stay. Bluetooth consumer robots are forecasted to grow from 29M shipments annually in 2017 to just shy of 80M in 2022.

Learn more about the connected device market
Bluetooth expanded the definition of the smart building by enabling indoor positioning and location services that focus on enhancing the visitor experience, increasing occupant productivity, and optimizing space utilization.

In addition, the 2017 launch of mesh networking marked the formal entry of Bluetooth into full-building automation.
10x growth in annual volume of Bluetooth location services devices by 2022

75% of top 20 retailers have deployed location services*

*Source: Proximity Marketing in Retail, by Unacast
Location services gain significant traction

Bluetooth technology is powering building-wide networks of beacons that enable indoor positioning and location services, including point-of-interest information, indoor navigation, and asset tracking.

Space utilization is also gaining momentum, with smart offices using Bluetooth to enable sensor-based occupancy mapping.

Connected lighting emerges as a key use case in automation

The ability to intelligently control lighting has a strong business case on its own. In addition, a wireless lighting solution can also function as a platform to further enable point-of-interest solutions, indoor navigation, asset tracking, and space utilization in the smart building.

The use of lighting as a platform to enable the creation of control, monitoring, and automation systems will continue to increase over the forecast period.

Retail and healthcare continue to be early proving grounds for smart building technologies

Retailers are among the early adopters to leverage Bluetooth to enable personalized promotions and way-finding services that connect shoppers to shelves, increase sales, and reduce operating costs.

In order to combat cost pressures, provide better patient care, and improve operational efficiencies, healthcare facilities are adopting Bluetooth technology to monitor patients, track assets, and advance emergency services. 100 million Bluetooth smart healthcare devices are forecasted to ship per year by 2022.

Learn more about the smart building market
Bluetooth technology powers wireless sensor networks to enable predictive maintenance and detect machine failures before they occur.

Bluetooth indoor positioning and location services and enterprise wearables also help manufacturers improve material management and process flow, while Bluetooth mesh enables the centralized automation of a factory’s essential systems.
7x increase in annual shipments of Bluetooth smart industry devices from 2017-2022

12x increase in annual volume of asset tracking and management solutions by 2022

Bluetooth Device Shipments
numbers in millions

253 million annual shipments


2017: 36 million
2018: 62 million
2019: 108 million
2020: 162 million
2021: 215 million
2022: 253 million

bluetooth.com | 37
Significant growth expected in industrial wireless sensor networks

In a drive to improve production efficiencies, leading manufacturers are looking to dramatically increase their deployment of sensor networks across the factory floor. These large-scale sensor networks are capable of lowering overall machine downtime and increasing flexibility in the manufacturing line.

Smartphones and tablets are replacing the machine UI

Bluetooth smartphones and tablets are emerging as central control devices within factories and industrial settings, providing a better, safer interface for monitoring and controlling industrial machinery.

Asset management provides transformational improvement to manufacturing

Automated asset tracking and monitoring enables manufacturers to better determine location, availability, and condition of equipment as well as track the overall output across the supply chain. Industrial deployments of Bluetooth asset tracking and management solutions will continue to increase, allowing factories to achieve new levels of operational efficiency.

Learn more about the smart industry market
As pressure on resources, utilities, and public funds increases, so too does the need for smarter solutions to effectively manage growing city populations.

Bluetooth technology is connecting smart cities to enhance the visitor experience and improve the quality of life for citizens, businesses, and employees.
5x growth in annual shipments of smart city enabling devices by 2022

84% of global airports will be using location services by 2019*

93% of US baseball stadiums will deploy location services by 2019*

*Source: Unacast Proxbook

Bluetooth Device Shipments

numbers in millions

192 million annual shipments
Cities are adopting location services

Location services driven by Bluetooth beacons are on a rapid growth trajectory across all smart city segments. These smart city services are helping create rich, personalized experiences for concert goers, museum lovers, sports fans, travelers, and tourists.

New technologies are improving the transportation experience within city limits

Government officials and city managers are deploying Bluetooth smart city solutions to improve transportation services, including smart parking lots and meters as well as enhanced bus services.

Bikes help power the sharing economy

Bluetooth is helping bring one of the main drivers of the sharing economy to life. Stationless bike sharing first caught the public’s attention in 2016. In 2017, steady rollouts worldwide accelerated its growth, with notable expansion in APAC.
Whether connecting TVs to soundbars or PCs to keyboards, Bluetooth technology has been at the heart of the connected home for years.

Now, Bluetooth mesh is bringing industrial-grade security and dependability to home automation applications.
650m
Bluetooth smart home devices will ship in 2018

6x
growth in annual shipments of Bluetooth home automation devices by 2022

54%
compound annual growth rate of residential smart lighting devices over the next 5 years

Bluetooth Device Shipments
numbers in millions

1.1 billion
annual shipments

Connected Home
Home Automation
Bluetooth remains an integral component of the connected home

From TVs to toys to tools, more and more everyday household items are using Bluetooth technology to wirelessly connect.

Steady growth in connected home devices is predicted, with connected home entertainment devices continuing to account for over half the volume.

Home automation is now poised to scale

Two forces will continue to push smart home solutions forward. 2018 has already seen the launch of the first Bluetooth full-home automation systems. Bluetooth mesh will continue to provide a reliable wireless connectivity platform that enables automatic control of lights, thermostats, smoke detectors, cameras, door bells, locks, and more. Among those, lighting is expected to be a leading use case with a 54% CAGR predicted over the next five years.

Meanwhile, the smart speaker has emerged as a potential central control unit for the smart home. Smart speaker volume is forecasted to grow 3x by the end of 2022.

Learn more about the smart home market