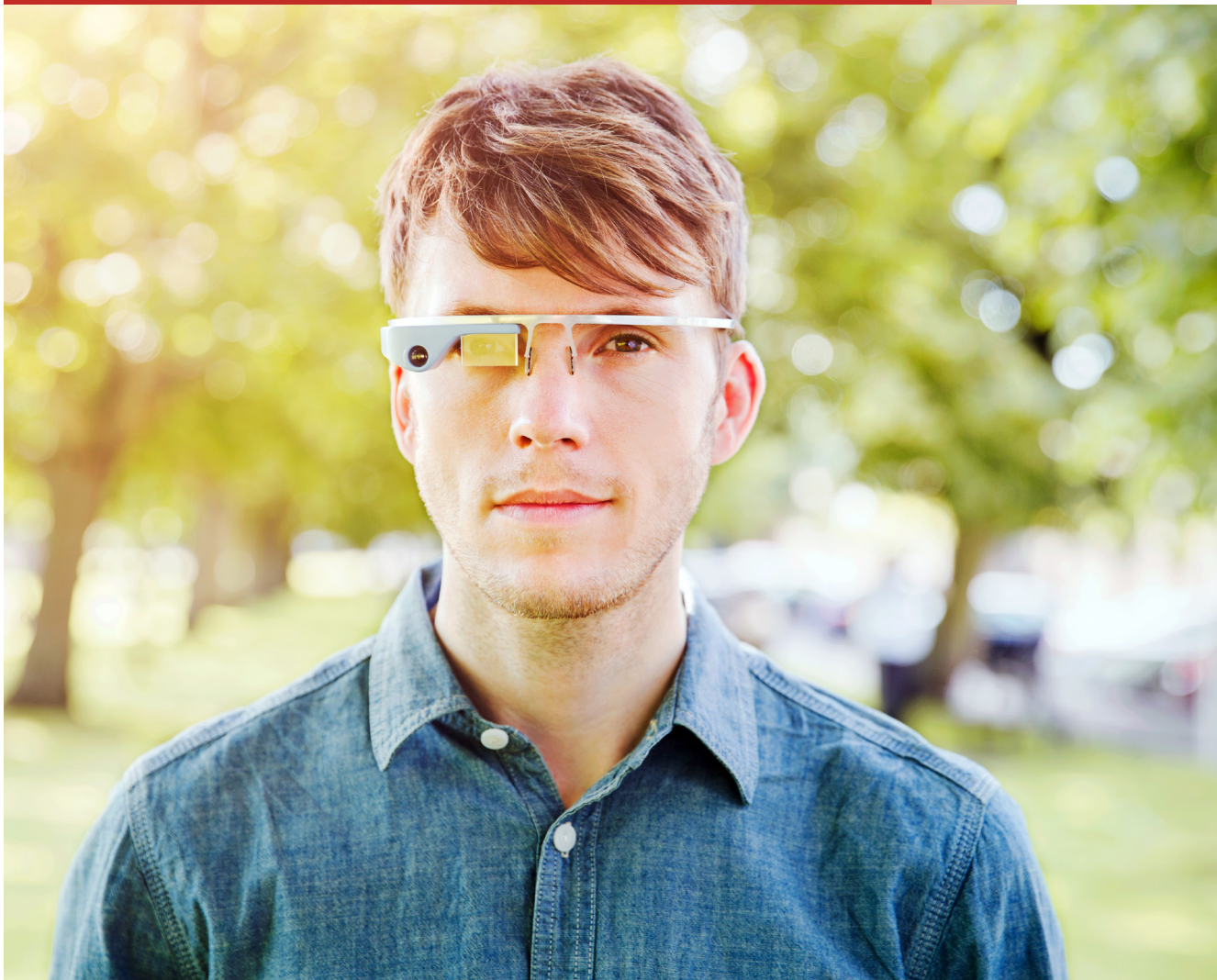


# ***The Wearable Life 2.0***

## Connected living in a wearable world

*Consumer Intelligence Series*



---

# Survey overview and study objectives

Through PwC's ongoing Consumer Intelligence Series, we gain directional insights on consumer attitudes and behaviors in the rapidly changing media and technology landscape. Building upon a study performed in 2014, PwC launched the 2016 wearable technology consumer research to better understand the wearable technology consumption landscape and identify trends in the industry to unearth potential opportunities and applications.

This research primarily focused on the attitudes consumers have towards wearable technology, as well as takes an in-depth look at penetration and usage of various types of devices. Additionally, we explored the benefits and underlying motivations behind usage and how it impacts both individuals and society.

This report summarizes key findings from a 1,000\*-respondent online quantitative survey<sup>1</sup> conducted in March 2016.

## Key research objectives were to:

- Gauge current usage, perceptions, attitudes, key drivers, and satisfaction of wearable technology and how various factors have changed since 2014
- Identify key benefits and barriers to using wearable technology
- Understand how wearable technology is impacting individuals and society
- Assess concerns around data and privacy with wearable technology
- Uncover potential white space opportunities and applications for wearable technology

## *A snapshot of the wearable world*

The future of wearable technology looks promising—not just here in the US, but worldwide. Turn to page 18 for a global wearable perspective featuring insights from Australia, England, Mexico, and Singapore.

## *How do we define wearable technology in this report?*

Wearable technology refers to accessories and clothing incorporating computer and advanced electronic technologies. Examples of wearable technology devices include fitness trackers/bands, smart glasses, smart watches, smart clothing, and other wearable devices. (This includes but is not limited to products such as Fitbit, Google Glass, GoPro, Apple Watch, etc.)

---

\* The first 700 respondents were fielded without a quota for wearable technology users in order to obtain natural incidence of ownership. The remaining 300 respondents were terminated as necessary in order to reach the 50% quota.

<sup>1</sup> Demographics—50% male, 50% female  
50% of sample: 18-34 years old  
50% of sample: 35-64 years old  
Census representation for ethnicity and race

# The wearable now

In our first foray into wearable technology in October 2014, we said, “There is indeed a wearable future ahead, one that can dramatically alter the landscape of society and business as we know it, and it’s right around the corner.”

A scant year and a half later in April 2016, we have turned that corner.

In October 2014, the Apple Watch would not be released for another six months and the FitBit was just gaining traction. With a focus on fitness trackers, companies began releasing wearables in quick succession. While many of them didn’t last long, the race had begun, signaling the wearable movement we see today: Adoption has more than doubled in two years.

In fact, 49% of respondents in our survey own at least one device (up from 21% in 2014). And 36% own more than one. We didn’t even ask this question in our previous survey since it wasn’t relevant at the time. That’s how far we’ve come.

## Explosive growth

The 49% of respondents who say they own a wearable could be slightly inflated: our definition notwithstanding, many consumers think of their smartphones as wearables. Category-wise, smart glasses and smart clothing in particular seem high, suggesting slight confusion in the marketplace around what counts as wearable technology, particularly for newer and emerging product lines. Regardless, the data—both from our survey as well as external data we’ve analyzed—shows clearly that the explosive growth in this space is all too real.

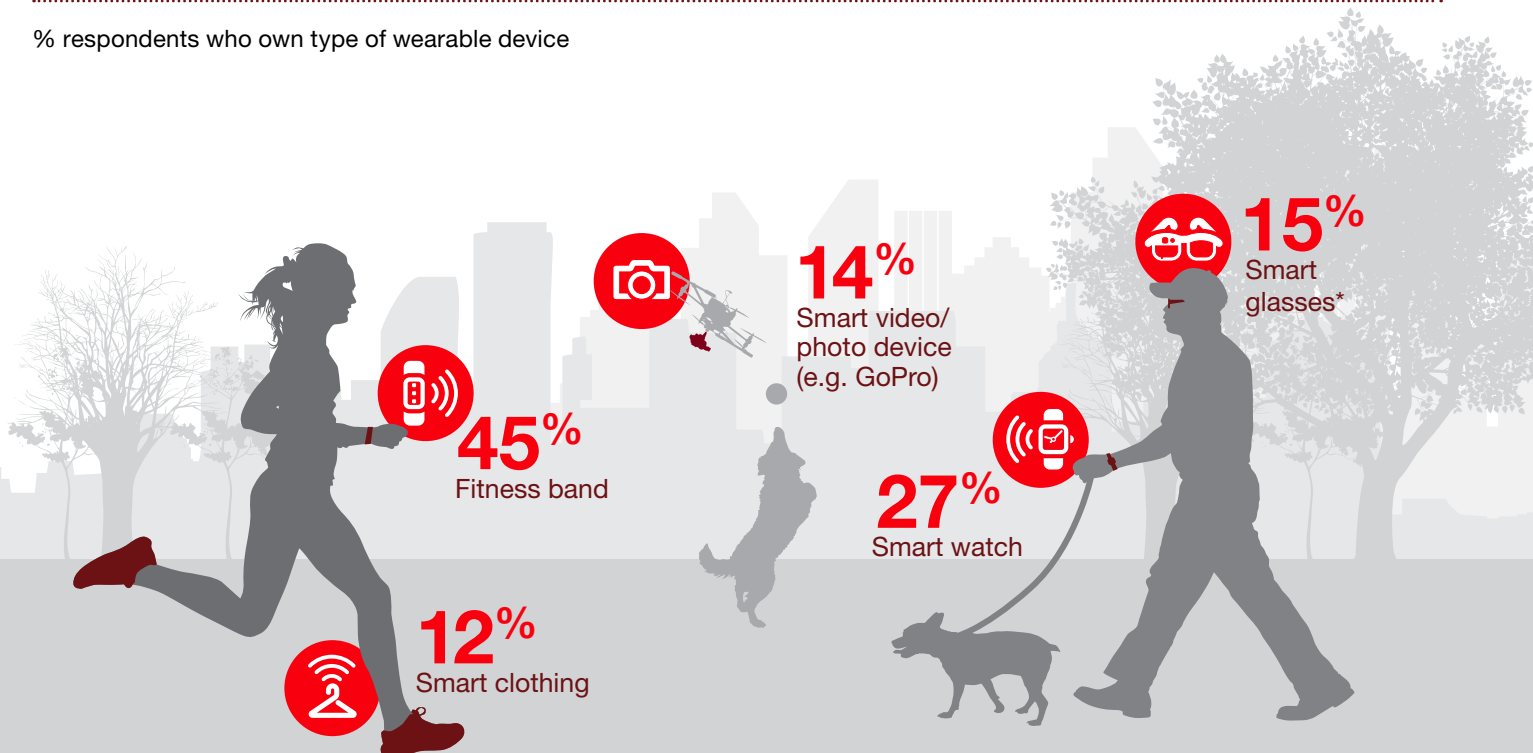
Both men and women like their wearables; however, men are more likely to own smart watches and smart glasses than their female counterparts. And not surprisingly, millennials are far more likely to own wearables than older adults. Adoption of wearables declines with age.

Of note in our survey findings, however: Consumers aged 35 to 49 are more likely to own smart watches.

Across the board for gender, age, and ethnicity, fitness wearable technology is most popular.

## Fitness runs away with it

% respondents who own type of wearable device



Base: Respondents who currently own at least one device (pre-quota sample, n=700); Q10A/B/C/D/E. Please tell us your relationship with the following wearable technology products. \*Includes VR/AR glasses

## ***Health: primary motivator***

Fitness wearables paved the way for wearable technology's popularity today. Case in point: the wearable section (made up of mostly fitness devices) occupied just a few hundred square feet at the 2014 Consumer Electronic Show (CES) in Las Vegas. By 2015, the two categories had consolidated, occupying both the Sands Expo and Convention Center in Las Vegas.<sup>2</sup>

By January 2016, the exhibit had tripled, taking center stage.<sup>3</sup>

Our survey echoed this pattern, with the majority of adoption taking place within the past year. And while this, too, held true for fitness devices, their head start has paid off—more of them were purchased over a year ago than any other type of device.



**Health = #1  
reason for  
purchase**

**57% are excited  
about wearable  
tech in everyday  
life, up from 41%  
in 2014.**



<sup>2</sup> engadget, "2015 is the year that wearables begin to grow up," January 10, 2015.

<sup>3</sup> Source: PRNewswire, "The Multi-Billion Dollar Wearable Tech Sector Headlines CES 2016," November 25, 2015.

# Warming up to wearables

In 2014, wearable technology was a fairly new idea. Some consumers were excited by its potential; others were wary of the impact it could have on their lives, work, businesses, and privacy.

Headlines such as “Wearable technology—Opportunity or nightmare” were not uncommon. And while some hesitation still exists today, questions like these have lessened as our society continues to become more comfortable with technology on the whole.

More than half (57%) of our respondents are excited about the future of wearable technology as a part of everyday life, up from 41% in 2014. Women and adults age 50-64 reported concern that wearable technology would dampen human interaction—but they were significantly less concerned since our previous survey. Overall, more respondents now believe wearable technology would promote, rather than discourage, human interaction.

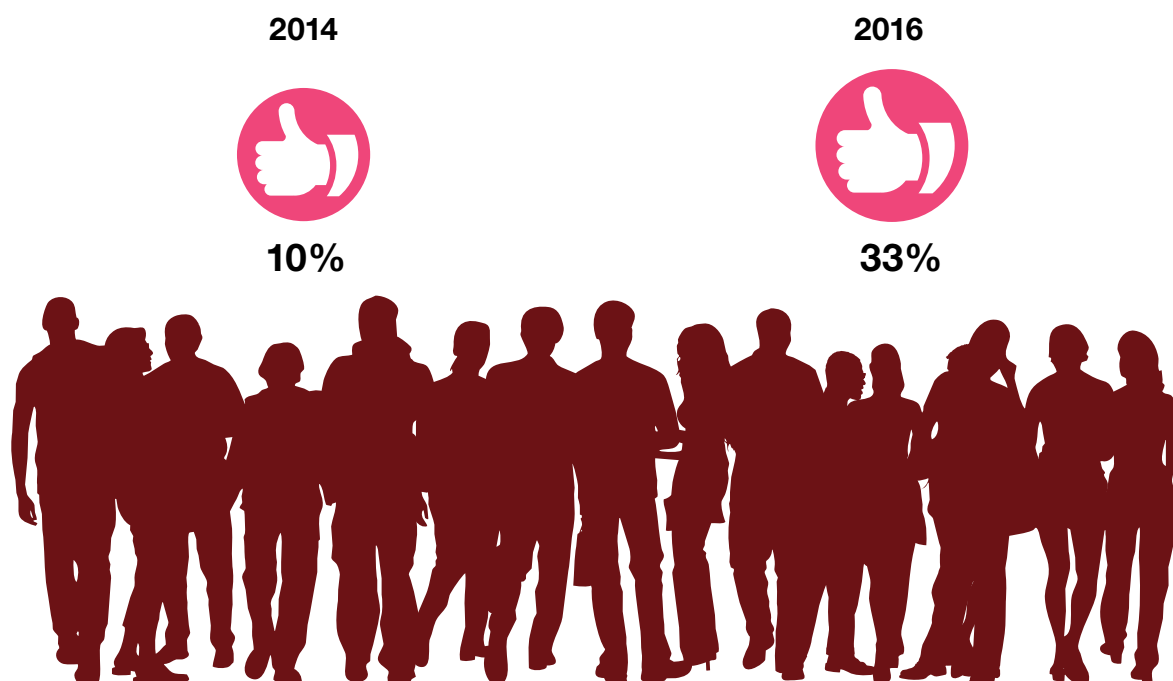
A positive shift in overall consumer sentiment is now clearly underway.

More so since 2014, consumers agree that wearable technology helps us exercise smarter (82%), helps parents keep their children safe (73%), improves personal accountability (69%), and makes us more efficient at home (65%) and at work (63%).

Consumers are also less likely to agree that wearable technology will make us more vulnerable to security breaches (down 8 points), will invade our privacy (down 7 points), and hurt our ability to relate to other humans (down 4 points).

## Wearables increase social interaction

Between 2014 and 2016, the number of people saying wearable tech would increase social interaction more than **TRIPLED**.



*Q: If wearable technology is part of everyday life, would you expect to interact with people... more?*

Base: Total sample (n=1000); Q42. If wearable technology is part of everyday life, would you expect to interact with people... more, less, the same?

# Keeping the wearable commitment

Our survey shows the initial buzz doesn't always translate to long-term commitment, most likely for one of these reasons:

1. Consumers don't perceive a pressing need for them; use-case unclear
2. Easy to lose
3. Unattractive or uncomfortable
4. Short-lived battery life
5. Does not sync seamlessly with a smartphone

While full abandonment was less severe, our survey did indicate a correlation between frequency of usage and time of purchase.

Over time, the newness wears off and fewer consumers use their wearables daily. Regardless of device type, wearables purchased over a year ago are used less often than those purchased more recently (within the last six months). Smart clothing experienced the largest daily drop-off, while smart glasses experienced the smallest.

- Glasses: 16% decrease
- Fitness: 18% decrease
- Watches: 22% decrease
- Clothing: 33% decrease

For consumers to commit to wearables for the long term, a device should not

*"Honestly, I forget it most of the time."*

– Male, 31

## Why wearables?

Strong usage motivators

Has features that reward frequent users w/ monetary rewards

54%



Has gaming feature to compete w/ others

45%



Provides me with information that I would otherwise not have

45%



Allows me to cut back on my spending

44%



Has apps/features that reward frequent users w/ loyalty points

43%



Looks good; an important part of my wardrobe/outfits

36%



Base: Currently own at least one wearable device (total sample, n=1000); Q14. Please rate how strongly the following would impact your usage of wearable technology, if at all (top box).

only be attractive and comfortable, but should also reach beyond data delivery to provide knowledge and benefits unavailable elsewhere.

For a wearable to be “sticky” in tech parlance, it needs monetary or other rewards attached to it. Like loyalty points. That’s what eight out of 10 current users—particularly women and millennials—told us.

Meanwhile, accountability is a major benefit of fitness devices. Wearables enable social connections for support in achieving fitness goals. And foster healthy competition, which is especially appealing to males and millennials.

A strong link is also evident between smartphone connectivity and frequency of usage: 78% of respondents with a smartphone-connected wearable say they use it more frequently precisely because of that connectivity. And a whopping 97% are satisfied with the smartphone application supporting their device.

# The wearable workplace

By 2020, more than 75 million wearables will permeate the workplace, according to research firm Tractica.<sup>4</sup> And Gartner research estimates that by 2018, 2 million employees will be *required* to wear health and fitness tracking devices as a *condition of employment*<sup>5</sup>.

Wearable tech in the workplace offers a wealth of possibilities for both employer and employee, as these three real-life scenarios illustrate:

## Scenario #1:

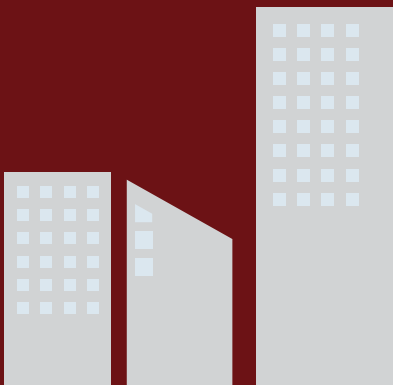
A tech company offers employees a subsidy covering the cost of a smart watch. Employees can track how many steps they take; these steps are converted into points which employees can donate to charity or redeem for merchandise.<sup>6</sup>

### Employer benefit:

Healthier employees translate into reduced healthcare costs, less sick time taken, and higher productivity.

### Employee benefit:

Fitness plus charitable donations, swag, and a healthier lifestyle overall.



## Scenario #2:

To coincide with the launch of a new app designed for women, a mobile fashion company gives its entire staff—almost all women—smart watches.<sup>7</sup>

### Employer benefit:

An in-house microcosm of the target demographic offered beta testing for real-time improvements.

### Employee benefit:

A brand new wearable for personal and professional use; a sense of being included in corporate decisions.



## Scenario #3:

Via 3D smart glasses, shop-floor employees at an auto manufacturer receive directly in their field of vision all the information they need daily, such as storage locations or part numbers.<sup>8</sup>

### Employer benefit:

A more efficient, cost-effective workplace since having the information readily accessible reduces cycle time.

### Employee benefit:

Streamlined processes foster productivity while reducing stress.



<sup>4</sup> Tractica, "Wearable Devices for Enterprise and Industrial Markets," 2Q 2015.

<sup>5</sup> Gartner press release, "Gartner Reveals Top Predictions for IT Organizations and Users for 2016 and Beyond," October 6, 2015. <http://www.gartner.com/newsroom/id/3143718>

<sup>6</sup> WatchReport, "IBM Gives Employees Apple Watches," October 28, 2015.

<sup>7</sup> Fast Company, "What One Company Learned When They Gave Apple Watches To The Entire Staff," July 16, 2015.

<sup>8</sup> Tech Times, "Volkswagen Employees Appear To Be Using Google Glass In Factory," November 25, 2015.

While the benefits of wearables in the workplace are indisputable, employee privacy can pose a challenge. Theoretically, a company can track an employee's location, hours worked, breaks clocked, even steps taken.

Personal time (such as late-night drinking for a friend's birthday) might well be monitored as part of the corporate wellness program. Conversely, employees who don't participate might be perceived as hiding something.

Companies meanwhile could be subject to data breaches, given the content and magnitude of the data. Wearables have the potential to capture/store more personal data than any other device that we've ever owned (e.g. details about employees' every move, habits, interests, health information).

Not unlike the early days of laptops and smartphones, questions about security and privacy have yet to be resolved for wearables. As wearable technology becomes more ubiquitous in the workplace, transparency and employee education will go a long way toward resolving these issues.

**67% of consumers say, "My company should pay for my wearable."**

## Consumers want wearable tech at work

**2-in-3** consumers want their company to pay for wearables.



This percentage is even higher among **millennials (71%)** and **males (70%)**.

## The reason: **efficiency**

**49% of respondents**

say wearable tech will increase workplace efficiency.



**37%** expect their company to adopt the latest technology (even if it doesn't directly influence their work).

# The business of wearables

Wearable technology offers tremendous opportunity for companies who want to better connect with customers. Health-related companies still have the edge overall; however, consumers—especially men and millennials—see a wealth of wearable tech potential in all aspects of their lives, far more so than when we queried them in 2014.

More than women, men are excited about wearable technology product options from their cable provider, bank, and automaker. Millennials meanwhile are most excited about

devices from their cellphone provider, teacher, and entertainment provider.

Consumer excitement, however, does not always correlate to consumer trust. Interestingly, while consumers *trust* banks more than cellphone providers, they are more *excited* by wearable tech options from cellphone providers than from banks.

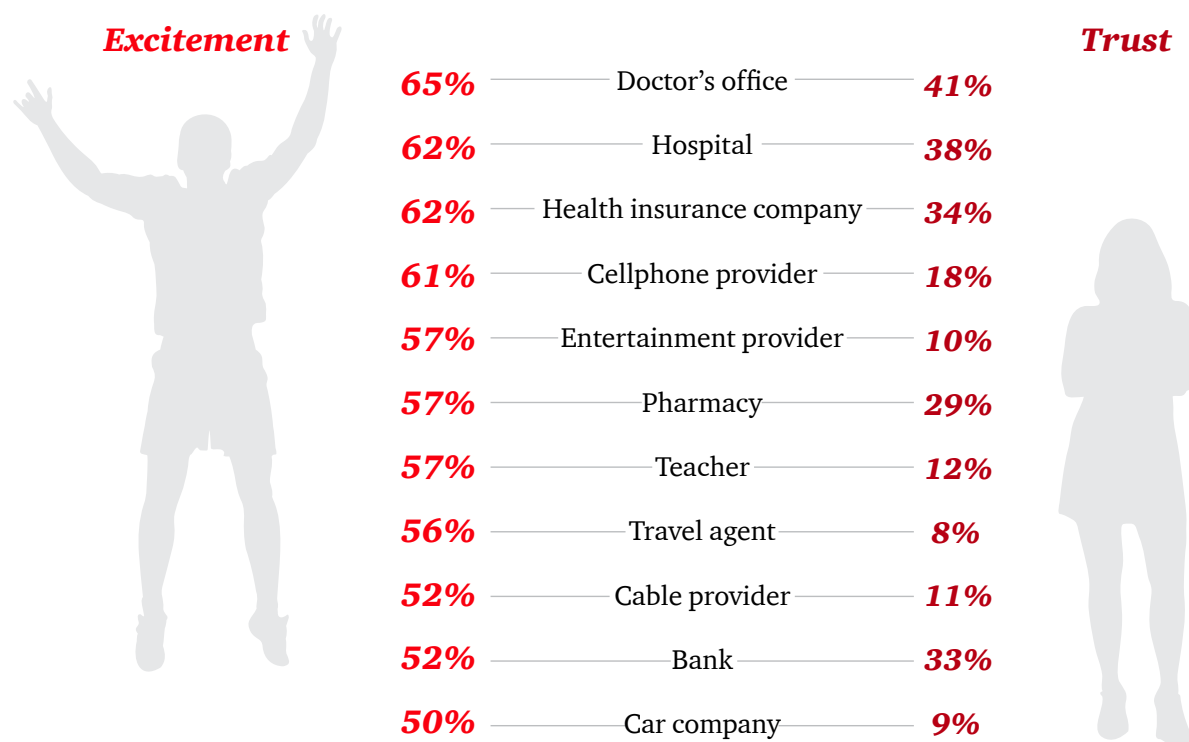
Meanwhile, 25% of respondents said they would not trust *any* company with personal information associated with wearable technology.

Overall, consumers are far more willing to trust health providers than consumer-product providers.

Some of the trust issues clearly correlate with the novelty of wearables; our own results show increased comfort levels between 2014 and 2016. Companies can ease consumer concerns by creating brand-defining wearables that are unobtrusive, easy to use, and improve quality of life. They can also illustrate to consumers that their data is secure.

## Consumer excitement doesn't always correlate to consumer trust

% excited about the possibility vs. % who'd trust a product from...



Base: Total sample (n=1000); Q37. Would you be excited to experience a wearable technology product from any of the following types of companies or individuals? (top 2 box); Q39. Which companies would you trust to capture your information through wearable tech? (top 2 box)

# The wearable journey: from hesitation to adoption

Price is far and away the number one barrier to adoption among current nonusers of wearables across all categories—as well as for respondents who say they have no interest in wearables in the future.

And with novelty comes a level of uncertainty, which leads to the second-highest reason for lack of uptake across all categories. Our respondents told us: “I don’t think I will actually use it.”

The top two consumer concerns would lead us to believe that they are hesitant to pay a lot of money for something

they don’t even know if they would use. In fact, the same product flaws discussed earlier that could lead to decreased usage or abandonment might well prohibit a wearable purchase in the first place.

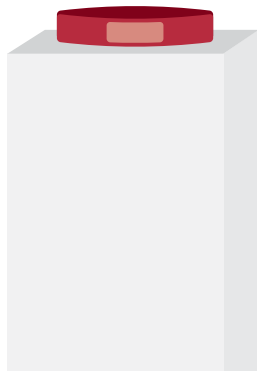
One might have thought that privacy would be the biggest hurdle facing wearable technology today. Not only is this not true, but concerns around privacy have actually lessened since 2014 for two out of the four product categories (smart watches and glasses).

## Justifying the wearable purchase...

I want it but will I use it?

### Fitness band

- 1 Price
- 2 May not use
- 3 Privacy
- 4 Device fatigue
- 5 Lack of relevance/utility



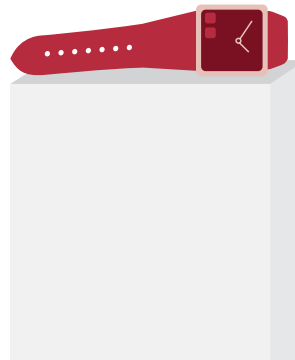
### Smart glasses

- 1 Price
- 2 May not use
- 3 Lack of relevance/utility
- 4 Privacy
- 5 Digital overload



### Smart watch

- 1 Price
- 2 May not use
- 3 Lack of relevance/utility
- 4 Device fatigue
- 5 Privacy



### Smart clothing

- 1 Price
- 2 May not use
- 3 Lack of relevance/utility
- 4 Privacy
- 5 Performance or quality



Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=1000); Q27. What are your biggest hesitations with regards to purchasing [ITEM TYPE] that can send and retrieve information about your health, location, and other details?

## Affordability, productivity are top reasons to buy



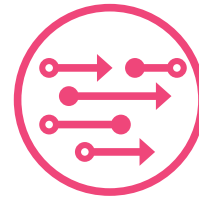
**36%**

It's affordable



**30%**

It helps me be more productive with my personal time



**25%**

It tracks personal information that's important to me



**16%**

It works seamlessly with my other mobile and stationary tech devices



**14%**

It looks fashionable/cool



**14%**

It helps me be more productive at work

Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=1000); Q19. Below are possible reasons for why someone might purchase a wearable technology device. Please select up to 3 statements below that would motivate you to adopt wearable technology.

Ultimately, consumers are telling us they have to perceive real value before they can invest in a wearable. For companies, the message is clear: Provide an irrefutable use case that clearly establishes the value of your wearable—especially one with a lofty price tag—for the consumer.

The reasons behind decreased usage (among current users) and reluctance to buy (among current nonusers) are strikingly similar. The same correlation can be said for increased usage (among current users) and future purchase motivation (among current nonusers).

Both groups are motivated by productivity, and are drawn to products that help simplify their life—sentiments especially true among our female respondents.

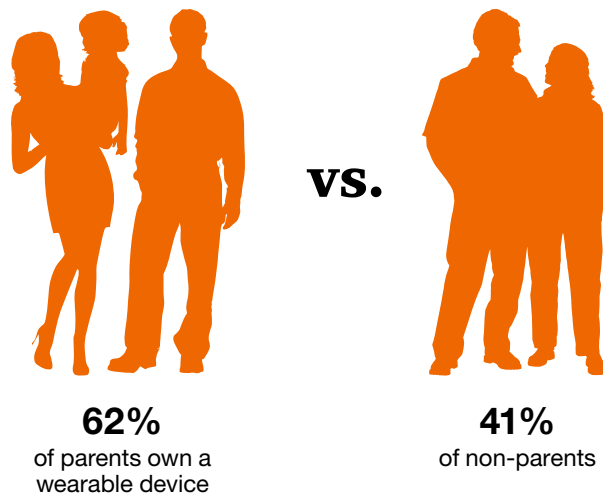
Men, meanwhile, are more likely to value the “coolness” factor (18% vs. 10% women). Seamless integration with a smartphone also tops the importance list.

## Spotlight on parents

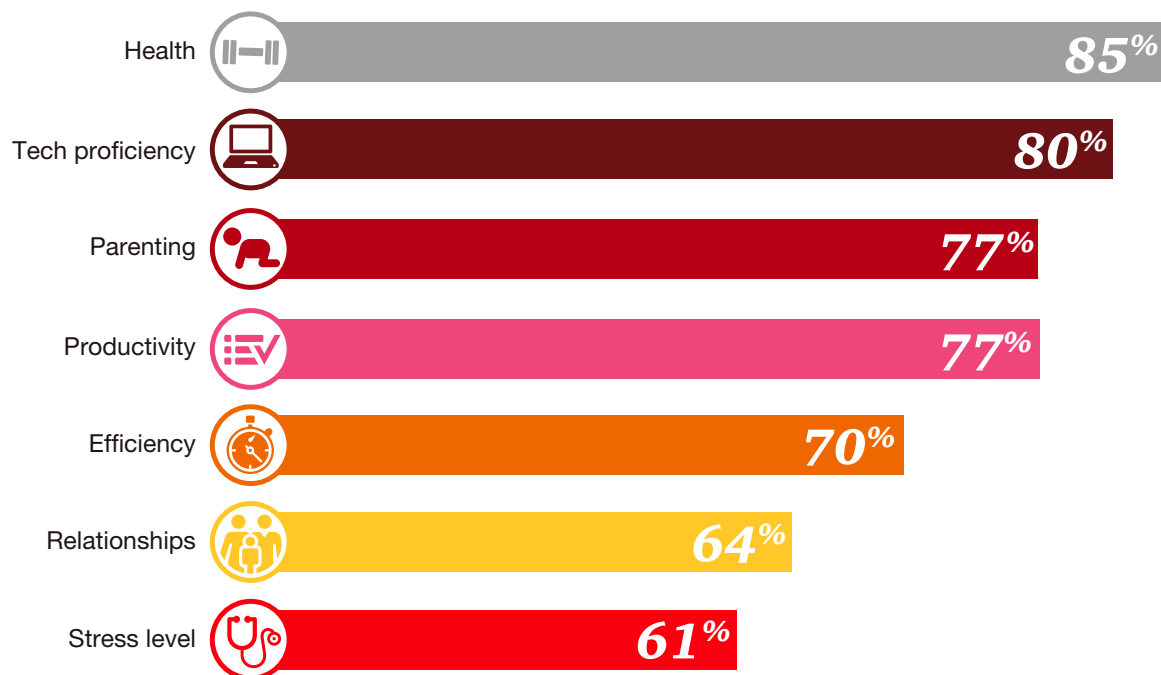
Parents (adults with at least one child in the household) are significantly more likely (49%) than non-parents (24%) to own not just one, but *multiple* wearable devices.

As with consumers overall, parents' main motivator for initial purchase was health (20%). Most non-parents, however, received their first device as a gift (18%).

Parents are also more likely than both non-parents and consumers overall to see wearable technology in a positive light. And parents are also *less* likely to believe that wearable technology will hurt their ability to relate to other humans, invade their privacy, or make them more vulnerable to security breaches.



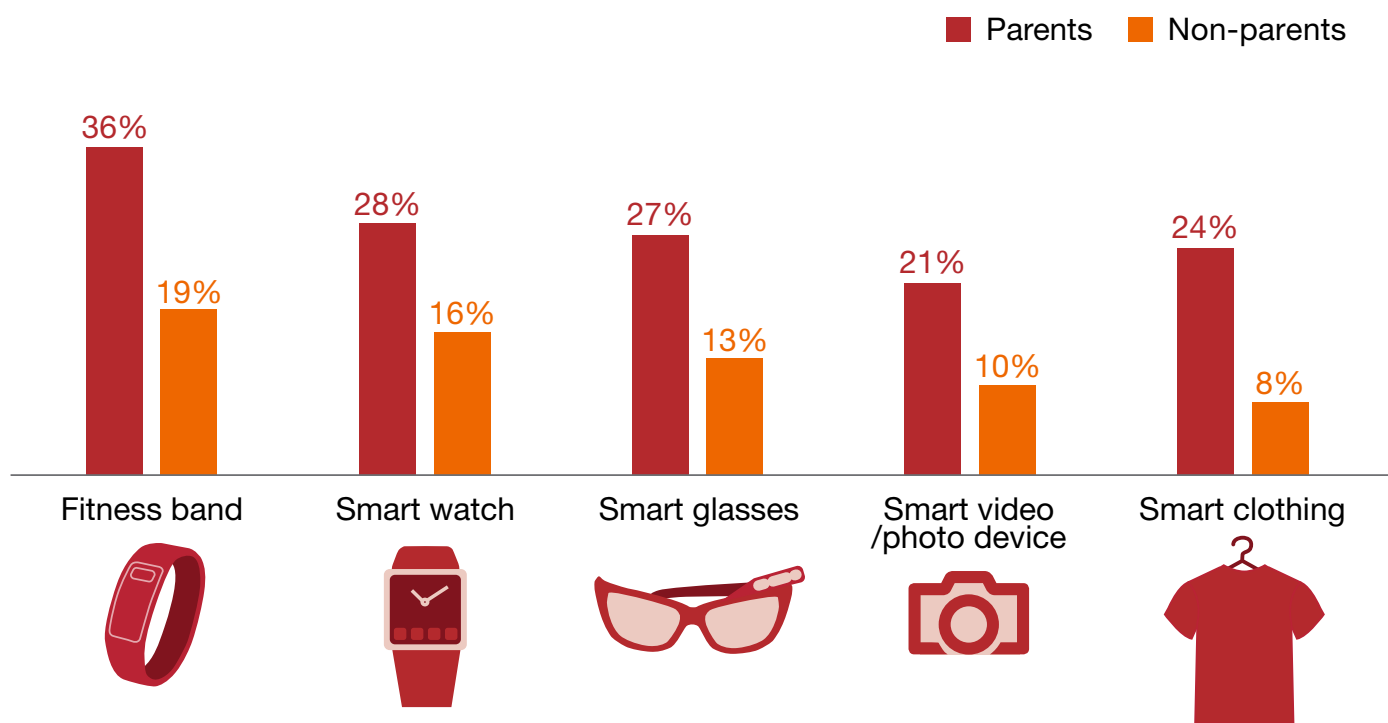
### Parents believe an increase in wearable technology can improve their:



Base: Total respondents (n=1000); Q20. Given what you know, or imagine, about wearable technology, how closely do you agree with the following statements? (top 2 box)

## Parents are early adopters

% very likely to purchase in next 12 months



Base: Total pre-quota sample (n=700); Q17. How likely are you to purchase the following wearable technology devices in the next 12 months?

As for benefits, parents are in favor of wearables that:

1. Keep their children safe
2. Help them exercise smarter
3. Make healthcare more convenient
4. Enable healthier eating
5. Make technology simpler to use

Parents who don't currently own a wearable technology device are much more likely than non-parents to buy one in the next 12 months. While price is the biggest hurdle for parents, they are open to wearables that:

1. Are reasonably priced
2. Improve productivity
3. Track important personal information

Peace of mind is a compelling reason parents buy wearables. A GPS tracker on a child's wristband in a crowded shopping mall connected to the parent's smartphone, for example.

Cementing closer ties is another. Parents, even grandparents, are open to technology as a means to better connect—and stay connected—with kids and grandkids.

In fact, 80% of parents believe wearable technology will make technology on the whole simpler and easier to use, most likely because they see their kids deploying technology with such ease. They told us ease of use was among the top five "must haves" for wearables.

As parents look for ways to simplify their lives, keep track of their kids, monitor their health and fitness, and chart personal information, wearable tech is an extremely viable option.

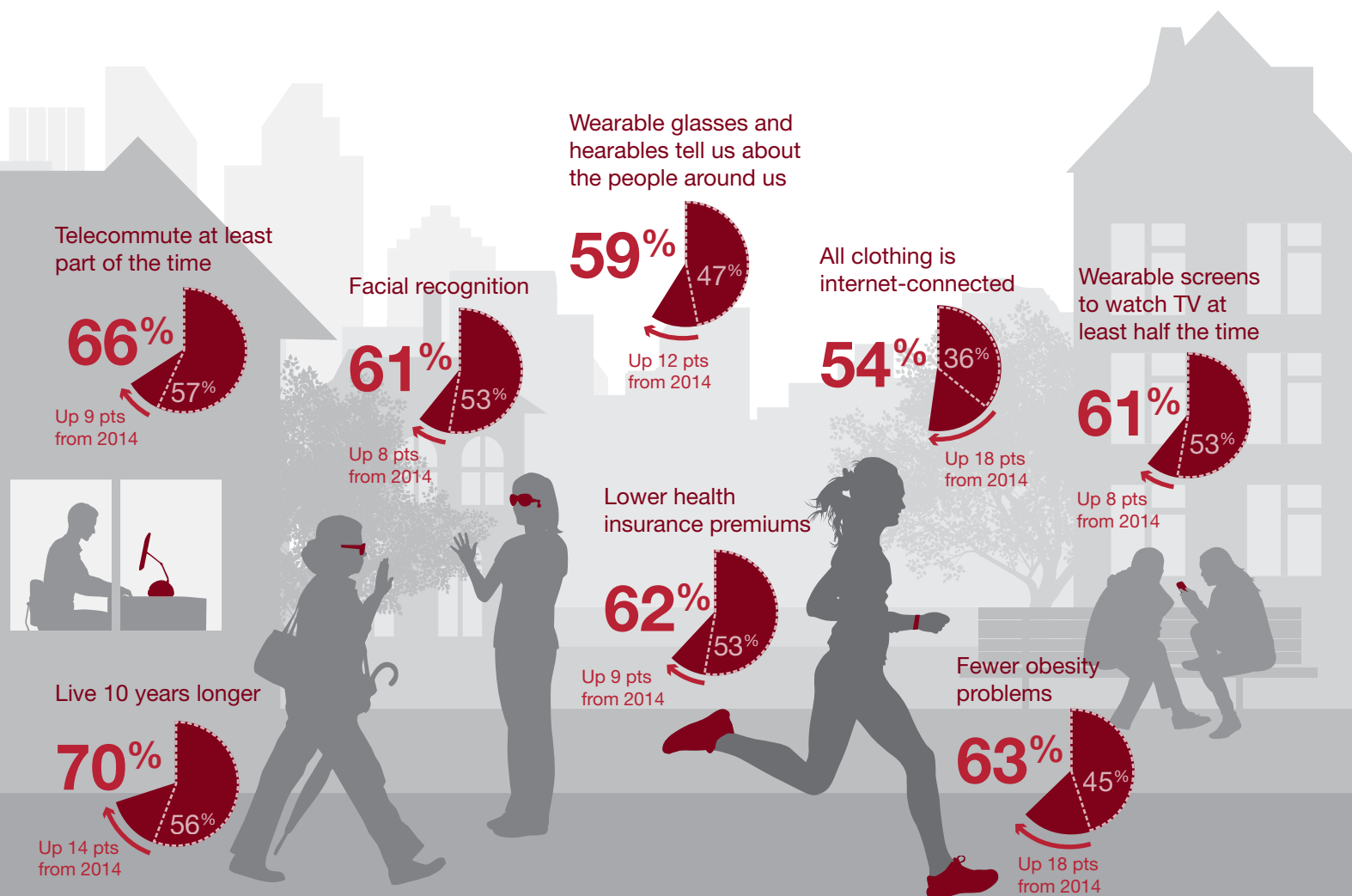
# The wearable future: live long and strong

Picture a fit, active world where people live longer, work flexible hours—sometimes remotely—and watch TV on wearable screens. Health insurance is less expensive as insurers monitor fitness levels and advise preventive measures.

That colleague whose name you can't remember? No worries: Wearable glasses and hearables combined with facial recognition software whisper Bob's name in your ear right before you enter the room for a meeting with him.

This is how consumers envision a wearable future. With overall sentiment improving, consumers are becoming more comfortable with the idea that wearable technology will have a positive effect on life. Since 2014, more consumers agree that widespread use of wearable technology could lead to a decrease in obesity (63%), an increase in life expectancy (70%), and would preclude the need to remember names (61%).

## Living longer, better lives . . . with wearables



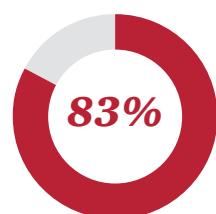
Base: Total sample (n=1000); Q43. Please indicate how likely each of the following is to come about as a result of widespread use of wearable tech. (top 2 box)

Consumers are also more optimistic and open to “what if” possibilities that could one day become reality. Possibilities that even a few years ago would have been unthinkable.

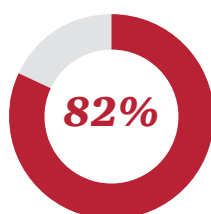
A healing hand bracelet with thermoelectric pulses to reduce joint pain, for example. Or mood-monitoring headphones that select the next song in your lineup. Or even a wearable that charts driving patterns for safe-driver discounts.

## Our wearable tomorrow

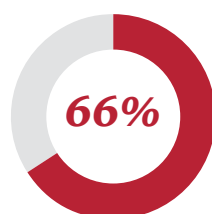
% who find the below scenarios useful



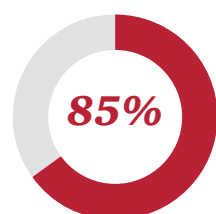
Thermoelectric pulses to heat, cool, and soothe your body via a bracelet that senses temperature, pain, and stress



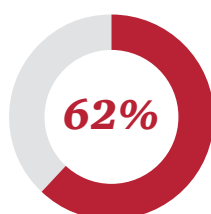
The ability to track your child's health, safety, or location via wearables



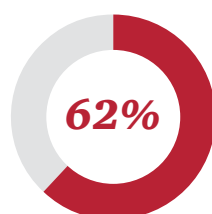
Mood-monitoring headphones to select your streaming music line-up



Safe-driver insurance discounts based on wearable tech



Name-recognition earbuds that feed you a bio when someone reintroduces him or herself



Rewards for productivity improvements based on employer-monitored wearables

Base: Total sample (n=1000); Q40. Below are some scenarios of how wearable technology may be used in the future. Please indicate how useful each would be to you. (top 2 box)



**The wearable future: A healing hand bracelet with thermoelectric pulses to reduce joint pain.**

*“If a device could tell I was having a panic attack, I might be able to stop it before it happens.”*

–Female, 27

Fitness wearables continue to lead the market in 2016—more than half of our survey respondents say they are very or somewhat likely to buy a fitness wearable in the next 12 months. However, smart watches are catching up and could eventually overtake fitness wearables.

### I'm off to buy . . . a wearable

% likely to purchase in next 12 months



**57%**

Fitness band



**53%**

Smart watch



**50%**

Smart video/photo device (e.g. GoPro)



**41%**

Smart glasses



**38%**

Smart clothing

Base: Total pre-quota sample (n=700); Q17 How likely are you to purchase the following wearable technology devices in the next 12 months? (top 2 box)

Future adoption overall, regardless of device type, looks promising for both current users and nonusers: 39% of our respondents are very likely to purchase a wearable within the next 12 months; 76% includes both very and somewhat likely.

Among current nonusers, nearly one in every four (24%) said they are very likely to purchase a future device; one in three includes both very and somewhat likely.

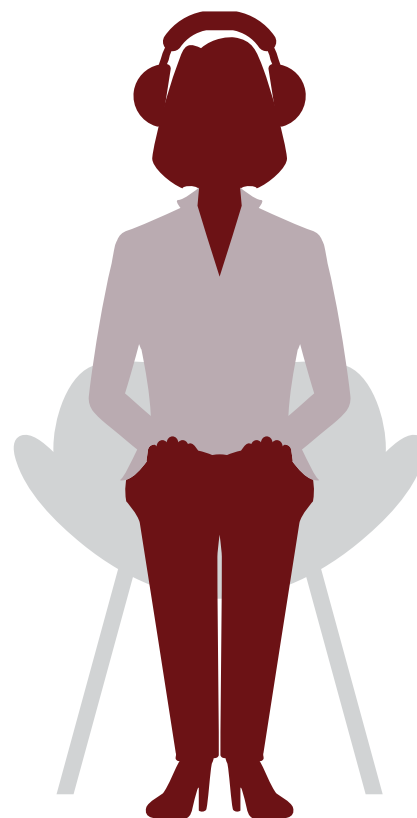
Sustained future success, however, relies heavily on user engagement. For now, most devices would not pass the “turnaround test,” which is characteristic of an item you would turn around and go home to retrieve if you realized you’d forgotten it on your way to work. Like your wallet. Or keys. Or smartphone.

The future of wearable technology rests on meeting this kind of “can’t-live-without-it” utility.

*“It would be nice to get notifications on products you use, activities you do, etc., and get rewarded for doing them.”*

– Female, 24

**The wearable future:  
Mood-monitoring  
headphones that  
select the next song  
in your lineup.**



---

# Implications

- 1. Wearables are becoming more ubiquitous.** More consumers are placing high premiums on the role of wearables to increase life expectancy, decrease obesity, and improve work-life balance than they did in 2014. The highest increase, however, was around clothing; up 18 points from 2014, more than half of consumers think all clothing will eventually be equipped with internet connectivity.
- 2. Wearables are eliciting more positive reactions.** Since 2014, possible benefits are seen as more positive and perceived drawbacks are seen as less negative. More consumers agree that wearable technology can improve customer service, make us more efficient at work, and relieve stress. Fewer consumers believe that wearable technology is an invasion of their privacy. And women value productivity while men seek the “coolness” factor.
- 3. Price—not privacy—is the biggest hurdle to adoption.** Across all categories, price is the number one purchase barrier among non-adopters, followed by consumers “not thinking they would actually use it.” Taken together, these top two concerns indicate they are hesitant to pay a lot of money for something they don’t even know if they would use. Ultimately, consumers are telling us they have to perceive real value before they can invest in a wearable. For companies, the message is clear: Provide an irrefutable use case that clearly establishes the value of your wearable—especially one with a lofty price tag—for the consumer.
- 4. Health benefits dominate purchase motivations.** And health-related information is top of mind for consumers: exercise, medical, dietary. Consumers are also excited about the prospect of their doctor’s office, hospital, and/or health insurance provider releasing their own wearable device, more so than any other industry.
- 5. Connectivity boosts engagement.** Today, consumers see a benefit in their wearable connecting to their smartphone; however, the broader trend is wearable connectivity with an ecosystem of smart-devices. Technology is evolving such that the wearable may not rely as heavily on being tethered to a smartphone for compute and communication capabilities. Continue to integrate smartphone capabilities into the wearable so that it can provide full value on its own.
- 6. Loyalty programs can foster increased use.** Eight out of 10 current users say they would use their product more if they were rewarded either monetarily or with loyalty points. This was especially true among women and millennials.
- 7. Parents represent enormous untapped potential.** Eager to simplify their lives, they own multiple wearable devices. And they are significantly more likely than non-parents to agree that wearable technology will improve personal accountability and will make them more efficient both at home and at work. They are also twice as likely to think wearable technology will relieve stress.

# Wearable tech goes global

From emerging to developed countries, wearable technology is growing at a rapid clip worldwide. In an effort to understand how user wants and behaviors differ around the world, we peeked behind the wearable curtain of four quite different countries: Australia, England, Mexico, and Singapore.<sup>1</sup>

Unsurprisingly, we found that technology continues to be the great unifier. In fact, while rates of use do vary by country, we did uncover some overarching themes:

- As expected, millennials are leading overall wearable adoption
- Fitness devices are the most prevalent wearable; smart watches are catching up
- Men are more likely to adopt smart glasses and watches, at least for now
- Women are more likely to value devices that improve productivity
- Health information is most sought after, especially among women



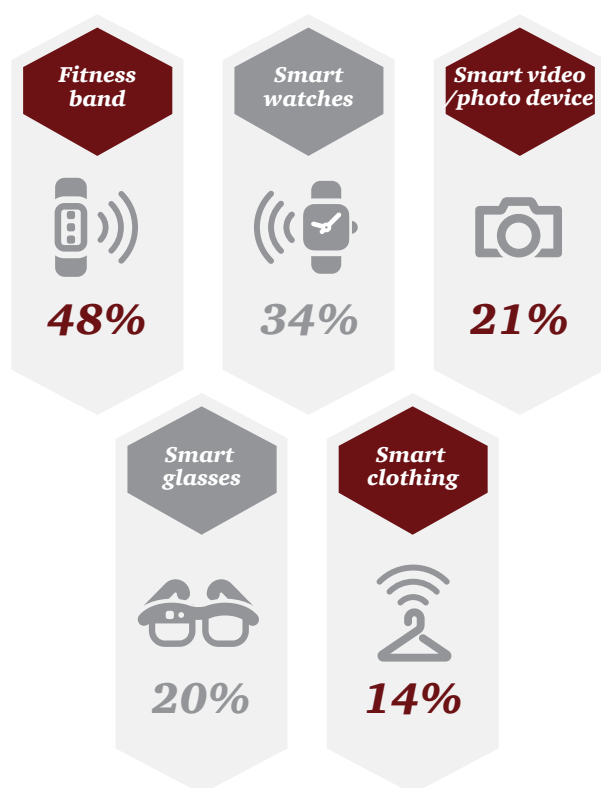
<sup>1</sup> Methodology: 2000 respondents, n=500 per country; ages 18-64 were recruited for an online quantitative survey in April 2016 and were required to meet the following screening criteria:  
-n=500 per country, natural fallout\*  
-50% Male / 50% Female  
-Ages 18-64 (50% 18-34; 50% 35-64)

\*We project that only 45% of Mexico's population has internet access, and this was an online-only survey. As such, additional weighting to Mexico's data was required in order to gain a more realistic picture of the country's wearable consumer.

# Australia

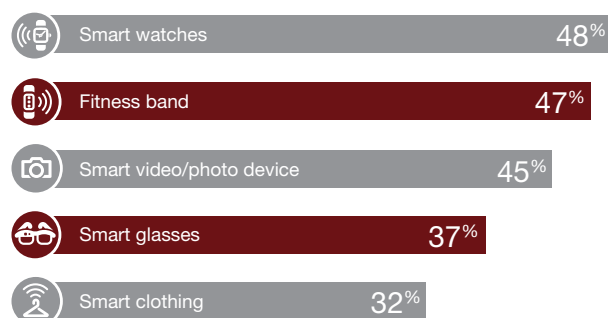
55% own a wearable device

## Types of devices owned



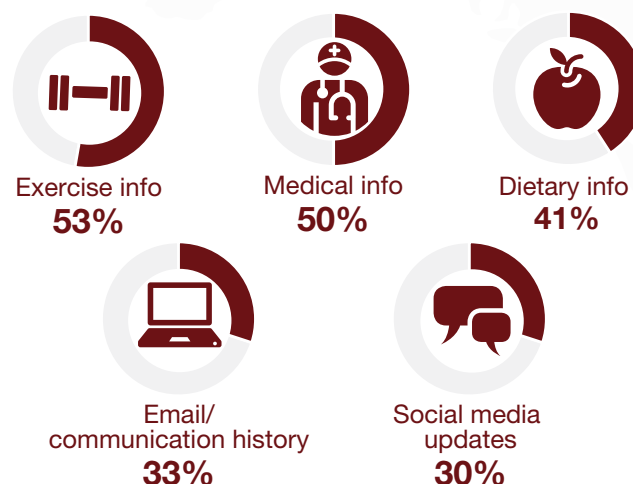
Base: Total sample (n=500); Q10A/Q10B/Q10C/Q10D/Q10E. Please tell us your relationship with the following wearable technology products.

## Likelihood of future purchase:



Base: Does not currently own (total sample: n=500); Q17. How likely are you to purchase the following wearable technology devices in the next 12 months? (top 2 box)

## Information wanted from device:



Base: Total sample (n=500); Q23. One benefit of wearables is that they provide the user with information about themselves and the things they encounter in everyday life. If you buy wearable technology in the future, what information would you personally want your wearable device to tell you?

## Top 5 purchase motivators and hesitations:



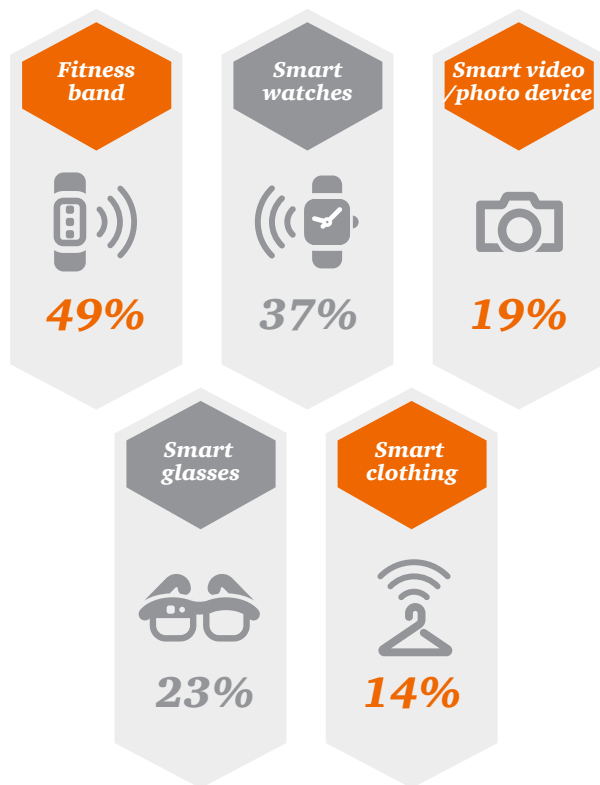
Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q19. Below are possible reasons for why someone might purchase a wearable technology device. Please select up to 3 statements below that would motivate you to adopt wearable technology.

Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q24. What are your biggest hesitations with regards to purchasing a [DEVICE]?

# England

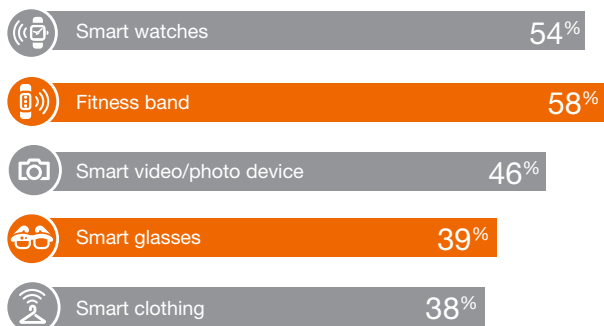
55% own a wearable device

## Types of devices owned



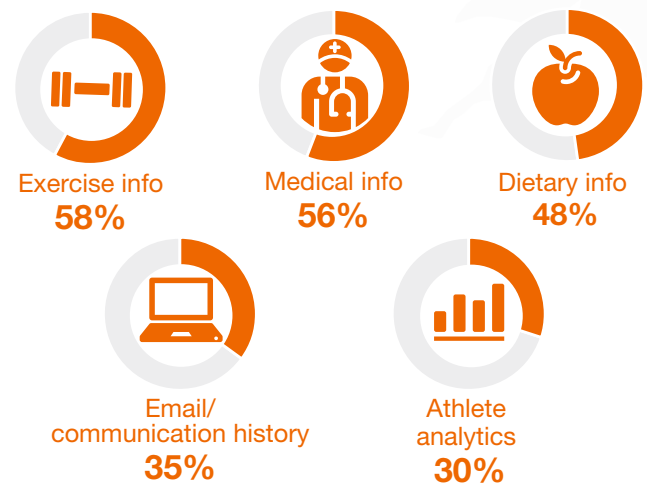
Base: Total sample (n=500); Q10A/Q10B/Q10C/Q10D/Q10E. Please tell us your relationship with the following wearable technology products.

## Likelihood of future purchase:



Base: Does not currently own (total sample: n=500); Q17. How likely are you to purchase the following wearable technology devices in the next 12 months? (top 2 box)

## Information wanted from device:



Base: Total sample (n=500); Q23. One benefit of wearables is that they provide the user with information about themselves and the things they encounter in everyday life. If you buy wearable technology in the future, what information would you personally want your wearable device to tell you?

## Top 5 purchase motivators and hesitations:



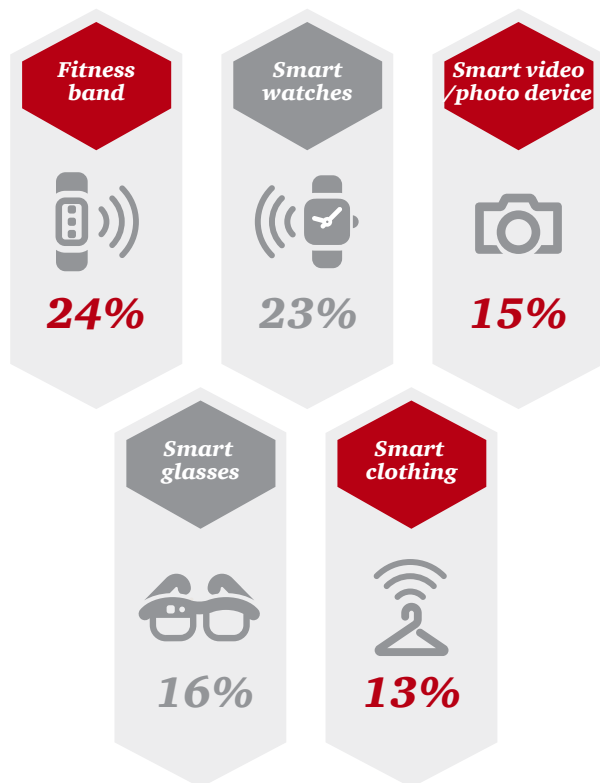
Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q19. Below are possible reasons for why someone might purchase a wearable technology device. Please select up to 3 statements below that would motivate you to adopt wearable technology.

Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q24. What are your biggest hesitations with regards to purchasing a [DEVICE]?

# Mexico

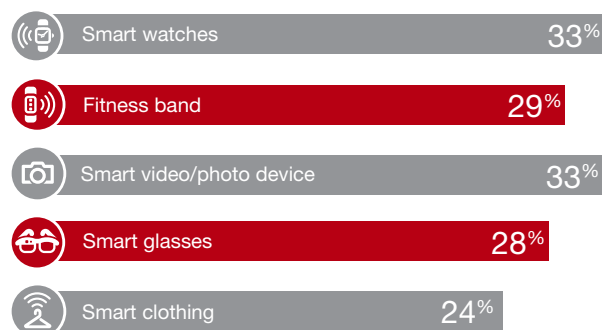
27% own a wearable device

## Types of devices owned



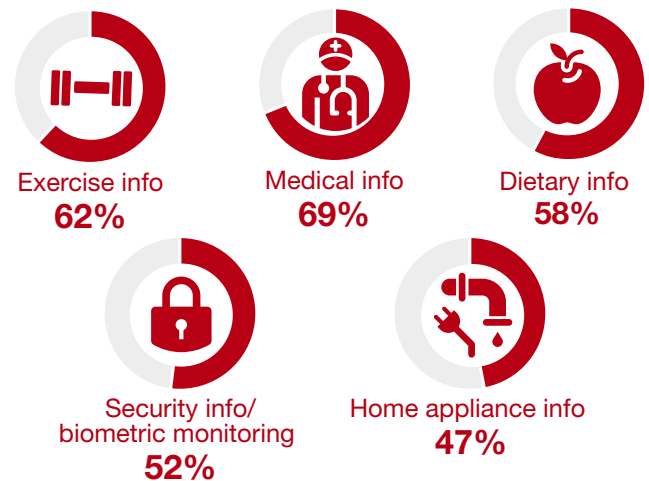
Base: Total sample (n=500); Q10A/Q10B/Q10C/Q10D/Q10E. Please tell us your relationship with the following wearable technology products.

## Likelihood of future purchase:



Base: Does not currently own (total sample: n=500); Q17. How likely are you to purchase the following wearable technology devices in the next 12 months? (top 2 box)

## Information wanted from device:



Base: Total sample (n=500); Q23. One benefit of wearables is that they provide the user with information about themselves and the things they encounter in everyday life. If you buy wearable technology in the future, what information would you personally want your wearable device to tell you?

## Top 5 purchase motivators and hesitations:



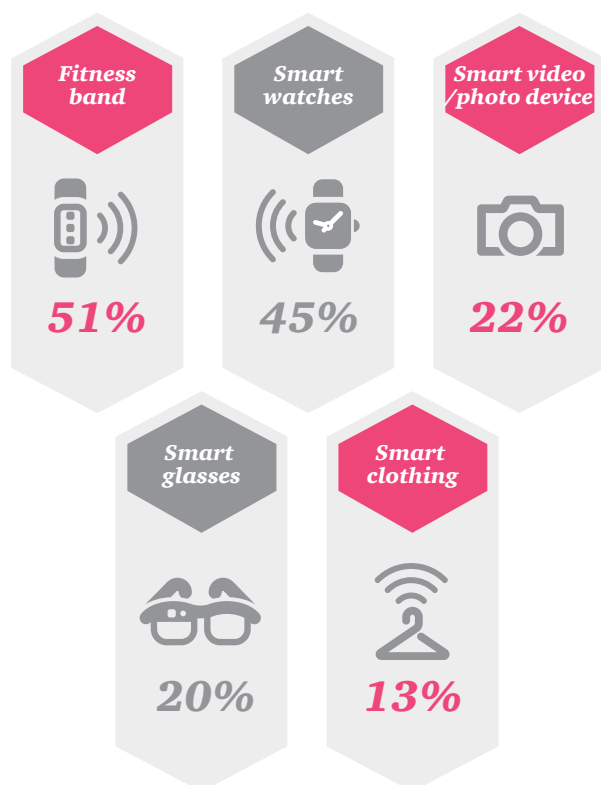
Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q19. Below are possible reasons for why someone might purchase a wearable technology device. Please select up to 3 statements below that would motivate you to adopt wearable technology.

Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q24. What are your biggest hesitations with regards to purchasing a [DEVICE]?

# Singapore

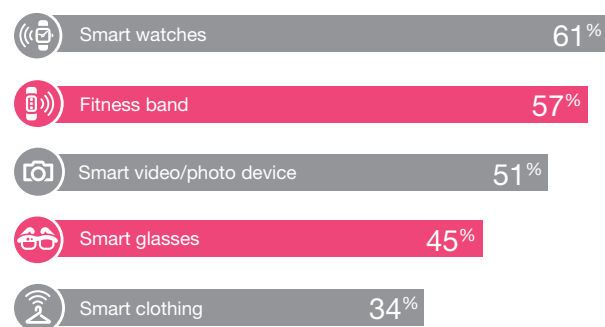
60% own a wearable device

## Types of devices owned



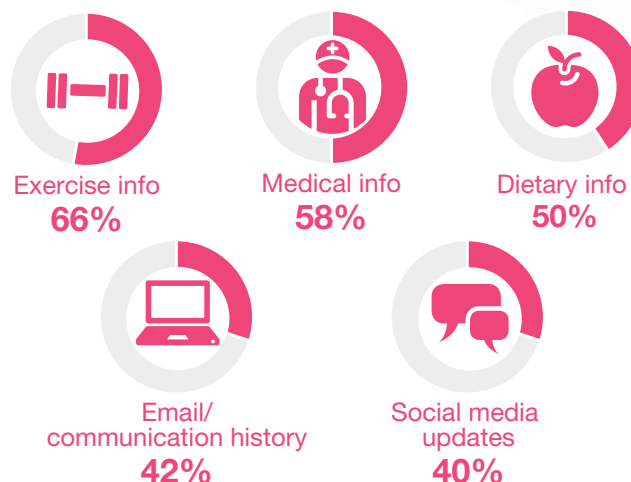
Base: Total sample (n=500); Q10A/Q10B/Q10C/Q10D/Q10E. Please tell us your relationship with the following wearable technology products.

## Likelihood of future purchase:



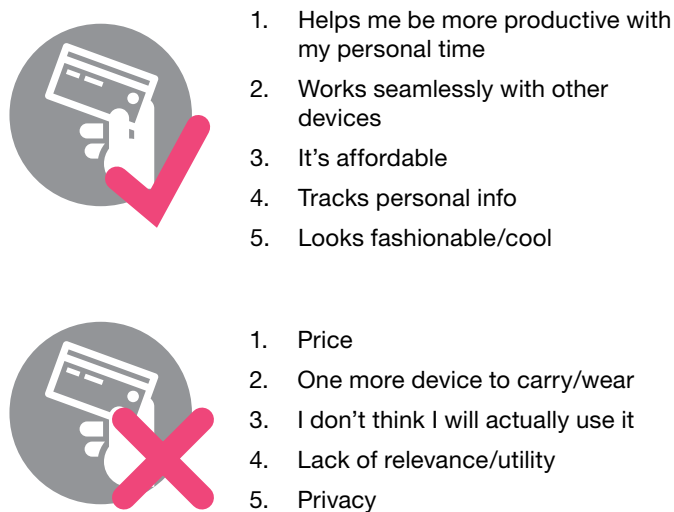
Base: Does not currently own (total sample: n=500); Q17. How likely are you to purchase the following wearable technology devices in the next 12 months? (top 2 box)

## Information wanted from device:



Base: Total sample (n=500); Q23. One benefit of wearables is that they provide the user with information about themselves and the things they encounter in everyday life. If you buy wearable technology in the future, what information would you personally want your wearable device to tell you?

## Top 5 purchase motivators and hesitations:



Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q19. Below are possible reasons for why someone might purchase a wearable technology device. Please select up to 3 statements below that would motivate you to adopt wearable technology.

Base: Does not currently own/somewhat or very unlikely to purchase (total sample: n=500); Q24. What are your biggest hesitations with regards to purchasing a [DEVICE]?

***For more information on this research, the PwC Consumer Intelligence Series, or how digital transformation is shaping the entertainment and media industries, please contact one of our specialists:***

Deborah Bothun  
deborah.k.bothun@pwc.com  
(616) 471 9048

Matthew Lieberman  
matthew.lieberman@pwc.com  
(213) 217 3326

***Additional information is also available on:  
pwc.com/cis***