



Wearables: The Current and Future Market Opportunity

Firstbeat HRV Summit
May 2019

James Manning Smith

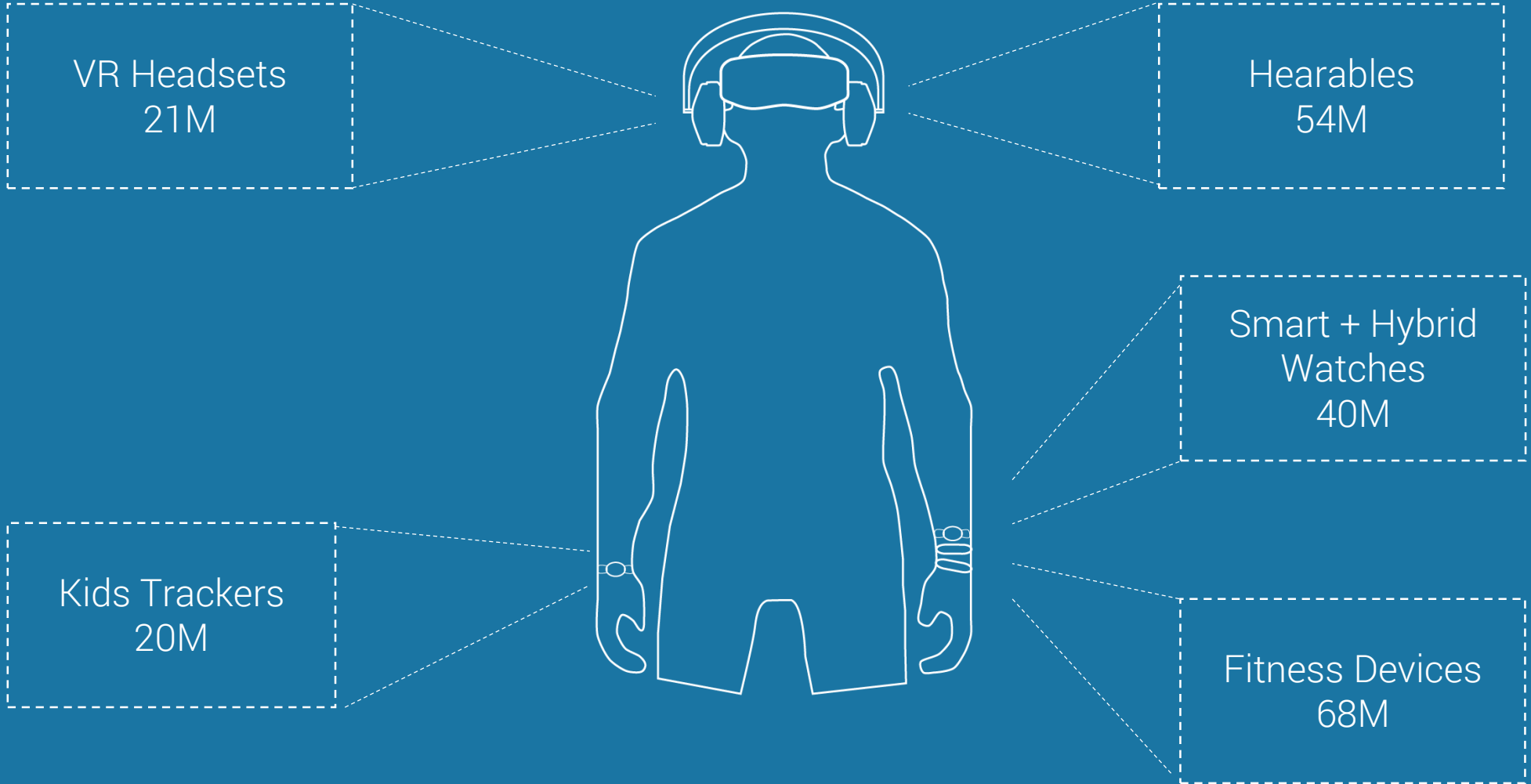
COMPANY WE KEEP



WARNER BROS.



WHAT WE COVER – WEARABLE VOLUMES



WEARABLES IN CONTEXT: WORLDWIDE CE SPENDING

2018 Worldwide Total CE Hardware
Retail Value \$1+ Trillion



Wearables, 2%

Smart Home, 1%

VR Hardware, 0.5%

CE Spending Expected to slow

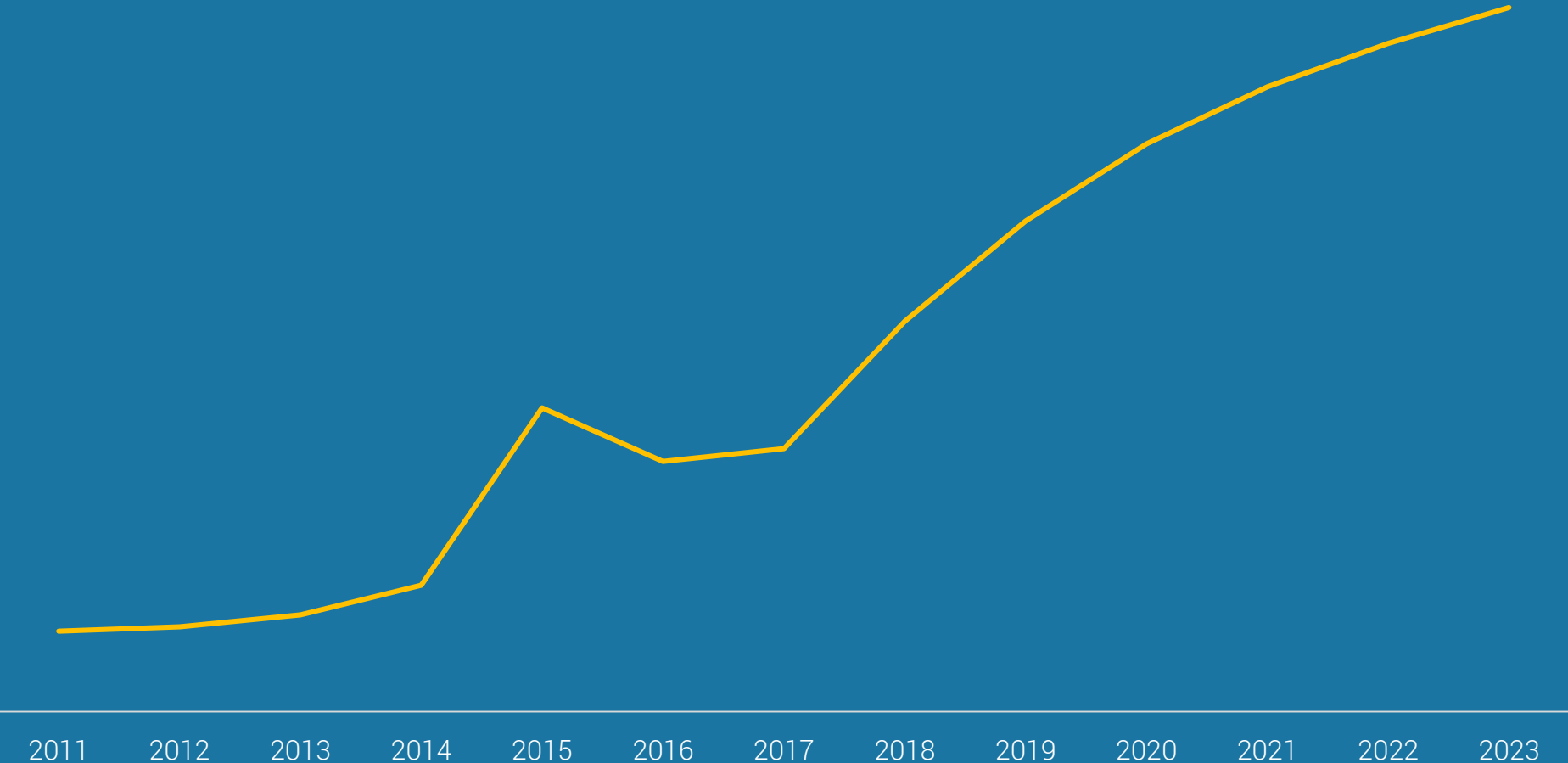
Opportunities for differentiation

Voice Technology driving new products

WEARABLES PAST...

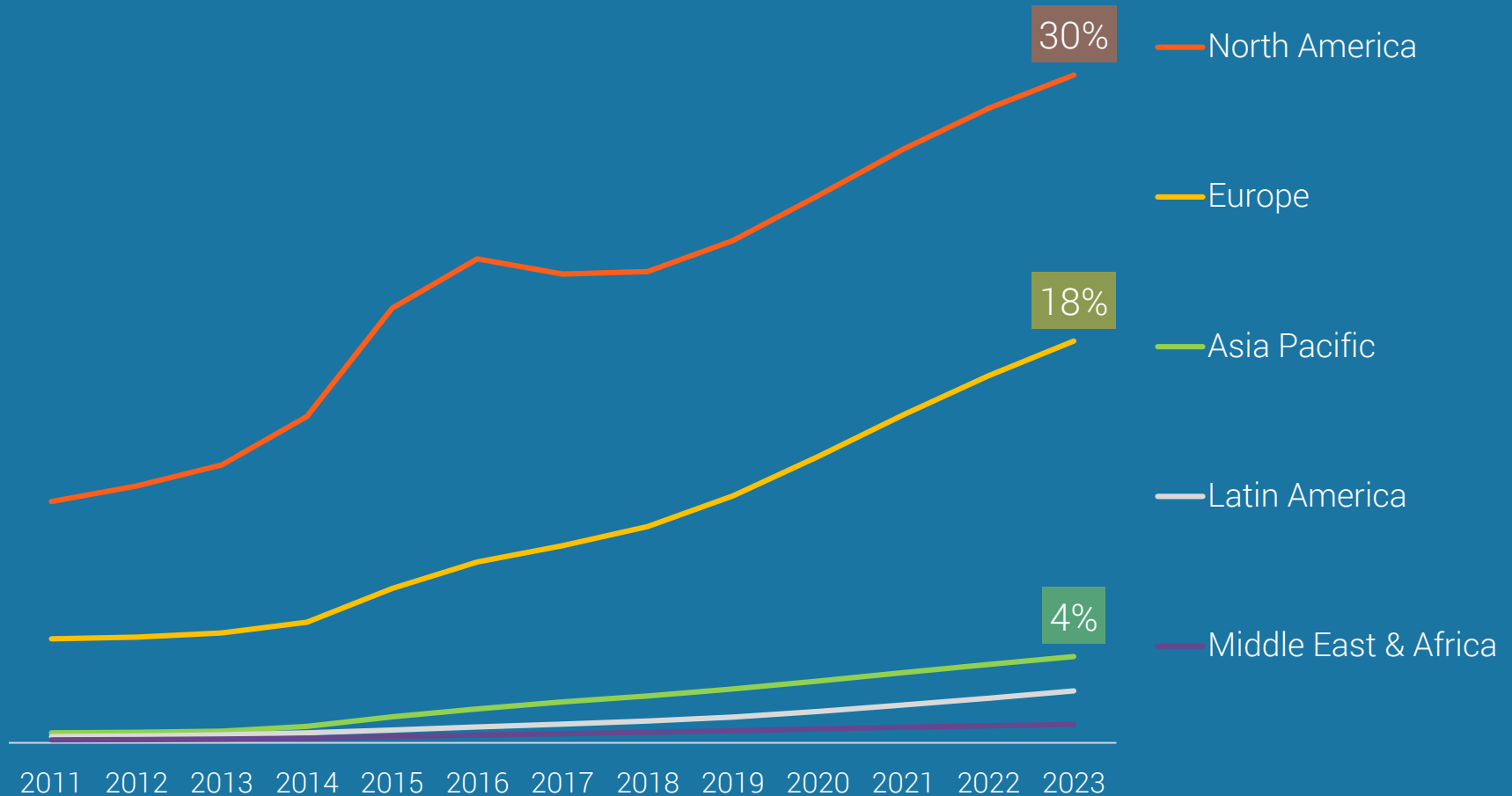
Wearables Retail Value, 2011-2023

9% 19-23 CAGR

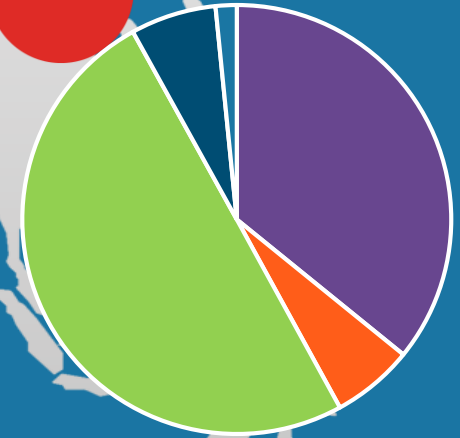
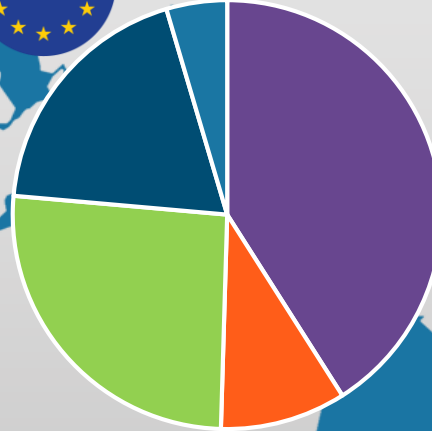
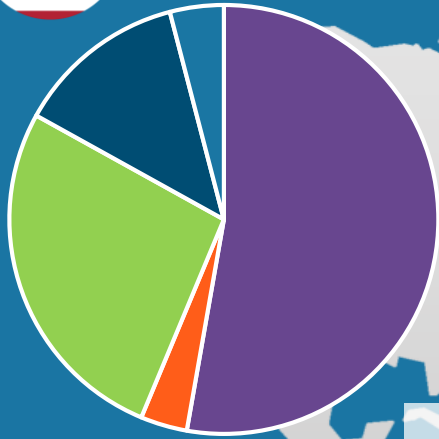


...AND WEARABLES PRESENT

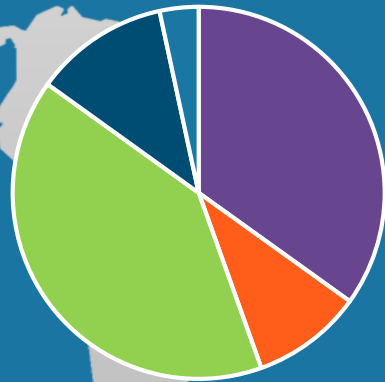
Wearables Shipments and Regional Population Penetration 2018-2023



REGIONAL WRIST-WORN PRODUCT DEMANDS



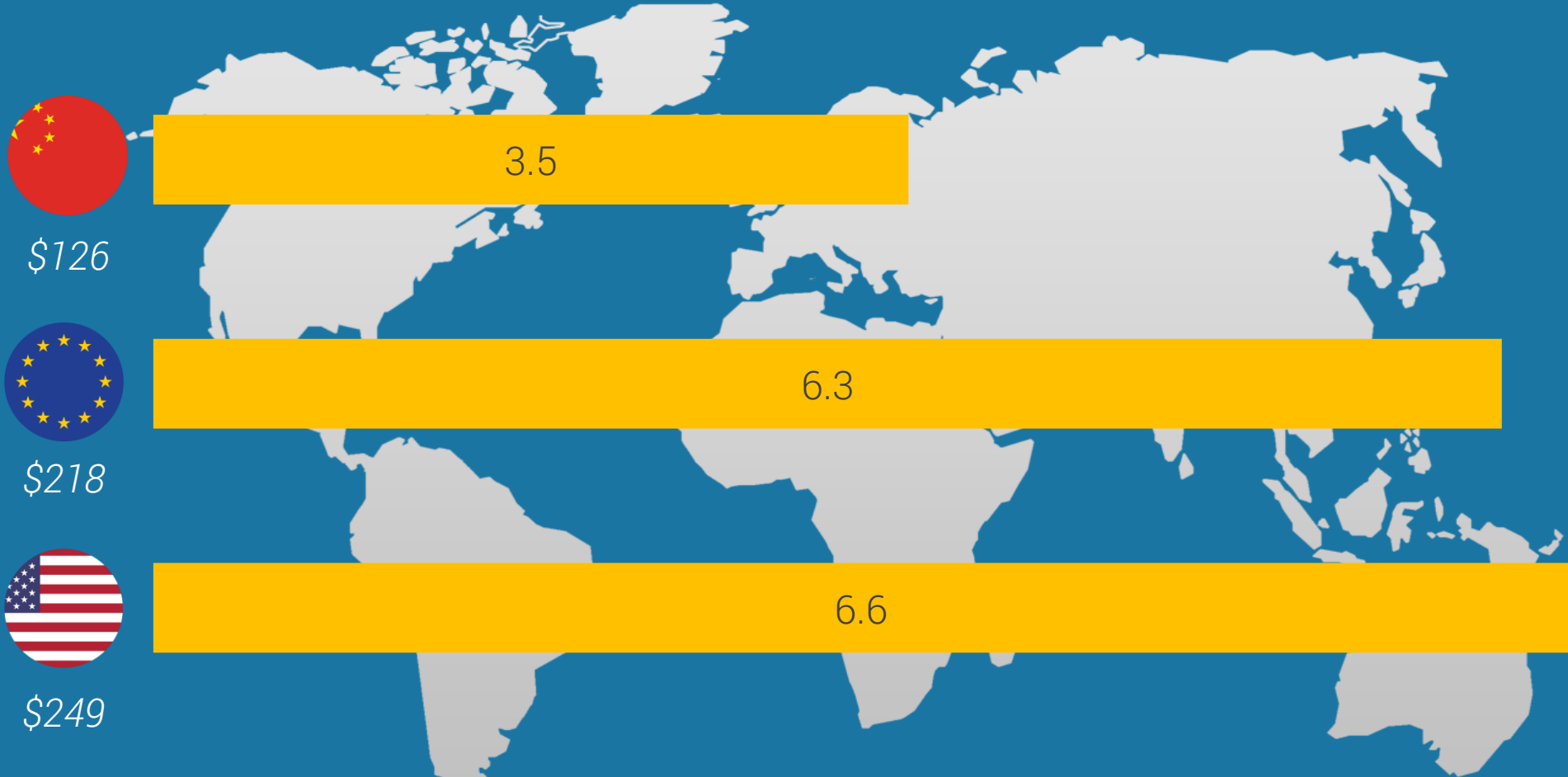
Rest of World



Smartwatches Hybrid Watches Activity Trackers Sports Watches Basic Fitness Wearables

PROJECTED WEARABLES SPENDING

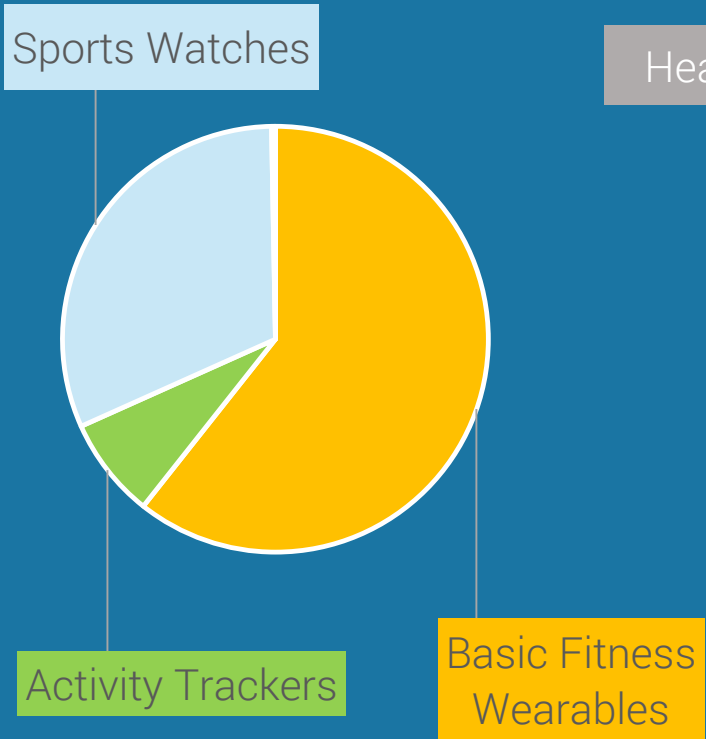
Wearables Retail Value By Market



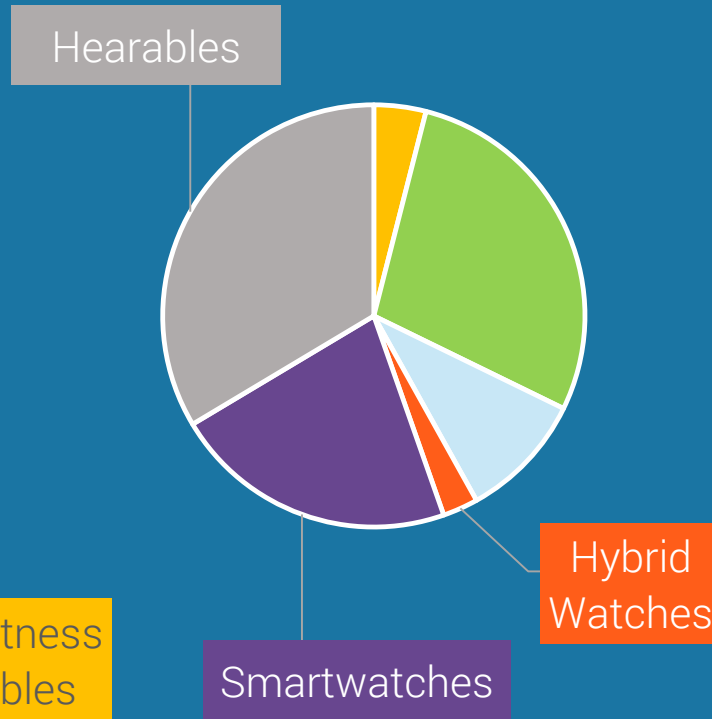
Average Retail Price
\$US

WEARABLES ECOSYSTEMS DEVELOPING

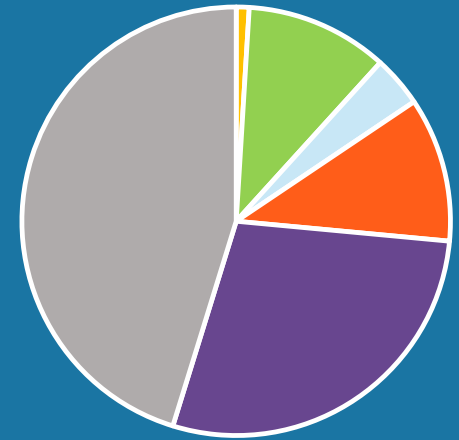
2011



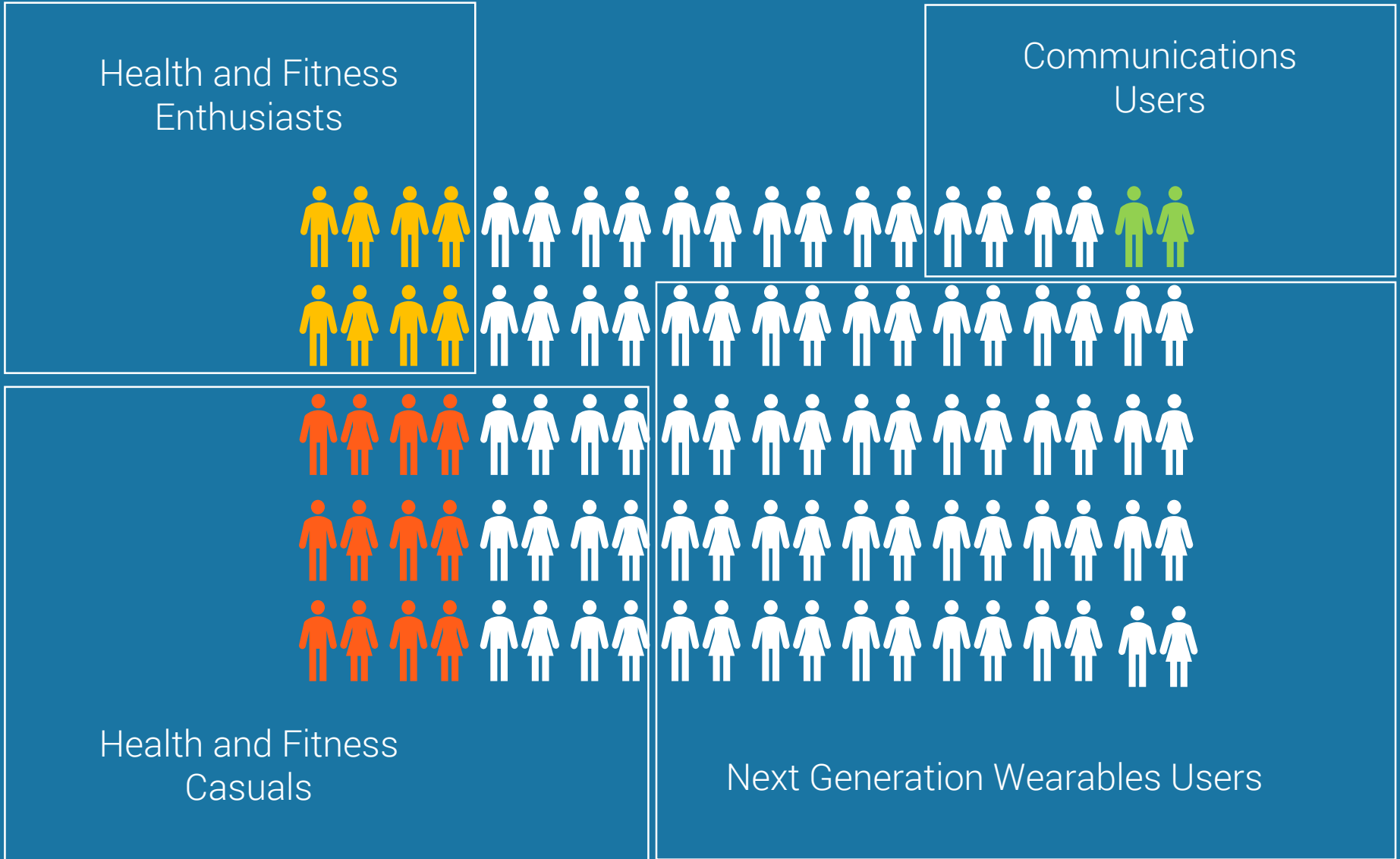
2018



2023

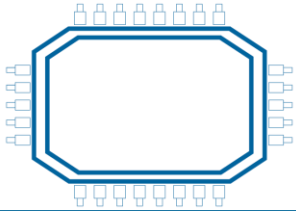


WEARABLES SEGMENT POTENTIAL



FEATURE DRIVERS

Hardware Development



| Investment in wearable hardware continues

- Biometric sensors
- Processor/SoC development and optimisation
- Continued commitment from wearables vendors

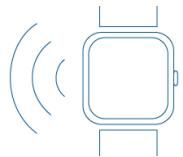
Health & Fitness



| Health Tracking Becoming Smarter

- Demand for Accuracy
- FDA Approved Medical Devices
- Chinese OEMs Following Trend

Communications & Productivity



| LTE Device Market Growing

- Network Operators Increasing Adoption of eSim
- Connected Functionalities Explored
- Building Blocks

About Futuresource

Futuresource Consulting is a specialist research and knowledge-based consulting company with a heritage stretching back to the 1980s.

Its insight and global market coverage are based on informed regional expertise, ensuring its portfolio of world-class clients is fully supported in research, analysis, strategic planning and decision making.

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- | Print & Imaging
- | Media & Entertainment
- | Education Technology
- | Optical Disc Manufacturing
- | Broadcast Equipment
- | Professional Displays

Talk to us...

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