

The Wearable Technology Ecosystem: 2018 – 2030 – Opportunities, Challenges, Strategies, Industry Verticals and Forecasts

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Abstracts

While wearable technology has been utilized in vertical sectors such as the military and healthcare industries for many years, ongoing advances have triggered a major resurgence of the concept, particularly among the consumer community. Key enabling technologies including low cost sensors, wireless connectivity, active materials and energy have converged to make wearable technology mainstream.

With the continued miniaturization of enabling technologies, wearable devices have hit the mass market in a diverse variety of form factors – ranging from smartwatches and fitness trackers to smart glasses to hearables.

Driven by the ability to interconnect with key modern trends of healthcare, fitness, messaging and socialization, the wearable technology ecosystem is attracting significant levels of interest. Companies as varied as smartphone OEMs, mobile operators, health insurers and retailers are circling the ecosystem alongside tiny startups, all vying for a stake.

SNS Telecom & IT estimates that wearable device shipments will grow at a CAGR of approximately 22% between 2018 and 2021. By the end of 2021, wearable devices will represent a market worth \$45 Billion with over 250 Million annual unit shipments.

The “Wearable Technology Ecosystem: 2018 – 2030 – Opportunities, Challenges, Strategies, Industry Verticals & Forecasts” report presents an in-depth assessment of the wearable technology ecosystem including market drivers, challenges, enabling technologies, consumer and enterprise applications, key trends, case studies, opportunities, future roadmap, value chain, ecosystem player profiles, vendor market

share and strategies. The report also presents forecasts for wearable device shipments and revenue from 2018 through to 2030. The forecasts cover 9 device form factor submarkets, 7 vertical markets, 6 regions and 73 countries.

The report comes with an associated Excel datasheet suite covering quantitative data from all numeric forecasts presented in the report.

Contents

1 CHAPTER 1: INTRODUCTION

- 1.1 Executive Summary
- 1.2 Topics Covered
- 1.3 Forecast Segmentation
- 1.4 Key Questions Answered
- 1.5 Key Findings
- 1.6 Methodology
- 1.7 Target Audience
- 1.8 Companies & Organizations Mentioned

2 CHAPTER 2: AN OVERVIEW OF WEARABLE TECHNOLOGY

- 2.1 What is Wearable Technology?
- 2.2 Device Classification
 - 2.2.1 Head-Worn Devices
 - 2.2.2 Wrist-Worn Devices
 - 2.2.3 Leg and Ankle-Worn Devices
 - 2.2.4 Arm, Chest and Neck-Worn Devices
 - 2.2.5 Smart Clothing & Jewelry
 - 2.2.6 In-Body Wearables
- 2.3 Enabling Technologies
 - 2.3.1 MEMS & Sensors
 - 2.3.2 BT-LE (Bluetooth Low Energy) & Wi-Fi
 - 2.3.3 Voice Recognition
 - 2.3.4 Lowed Powered Wireless SoCs
 - 2.3.5 RFID & NFC
 - 2.3.6 GPS & Navigation Technology
 - 2.3.7 Energy Harvesting
 - 2.3.8 Ergonomics & Materials Science
 - 2.3.9 Augmented Reality
- 2.4 Market Growth Drivers
 - 2.4.1 Proliferation of Smartphones
 - 2.4.2 Advances in Enabling Technologies & Components
 - 2.4.3 Interest from New Market Segments
 - 2.4.4 Human Centric Assistance
 - 2.4.5 Meaningful Analytics & Tracking

2.4.6 Venture Capital, Crowdfunding & Corporate Investments

2.4.7 Endorsement by Major Mobile OEMs

2.5 Market Barriers

2.5.1 High Costs

2.5.2 Power Consumption & Battery Life Issues

2.5.3 Usability & Unusual Styling

2.5.4 Potential Health Issues

2.5.5 Privacy & Security Concerns

2.5.6 Social Acceptance

3 CHAPTER 3: VERTICAL OPPORTUNITIES & USE CASES

3.1 Consumer Markets

3.1.1 Infotainment & Lifestyle

3.1.1.1 Personal Assistance, Notifications & Alerts

3.1.1.2 Photography

3.1.1.3 Navigation Assistance

3.1.1.4 Smart Home Applications

3.1.1.5 Media & Entertainment

3.1.1.6 Memory Recall

3.1.2 Casual Sports & Fitness

3.1.3 Contactless Payments

3.1.4 Gaming

3.1.5 Pet Care

3.1.6 Child Care & Entertainment

3.1.7 Helping People with Disabilities

3.1.8 Car Insurance Claims

3.1.9 Accurate & Targeted Marketing

3.2 Healthcare

3.2.1 Remote Patient Monitoring

3.2.2 Assisted Patient Examination

3.2.3 Reducing Healthcare Costs

3.2.4 Optimizing Health Insurance Costs

3.2.5 Enhancing Medical R&D

3.3 Professional Sports

3.3.1 Sports Data Analytics

3.3.2 Enhancing Real-Time Decision Making

3.3.3 Injury Prevention

3.4 Retail & Hospitality

- 3.4.1 Improving Retail Productivity
- 3.4.2 Comparing & Contrasting Retail Items
- 3.4.3 Travel: Personalizing Customer Service
- 3.4.4 Replacing Hotel Keys and Credit Cards
- 3.4.5 Augmenting City & Museum Tours
- 3.5 Military
 - 3.5.1 Enhancing Infantry Tactics: Shooting Without Being Shot
 - 3.5.2 Monitoring Combat Stress & Injuries
 - 3.5.3 Enhancing Situational Awareness in the Battlefield
 - 3.5.4 Enabling Battlefield Mobility
 - 3.5.5 Facilitating Communications with Military Dogs
- 3.6 Public Safety
 - 3.6.1 Recording Criminal Evidence
 - 3.6.2 Enhancing Situational Awareness & Assets Coordination
 - 3.6.3 Identifying Suspects & Traffic Violators
 - 3.6.4 Monitoring Biophysical Activity for First Responders
 - 3.6.5 Enhancing Fire Fighting Capabilities
 - 3.6.6 Improving Response to Medical Emergencies
- 3.7 Other Verticals
 - 3.7.1 Construction Industry
 - 3.7.2 Mining Industry
 - 3.7.3 Manufacturing Operations
 - 3.7.4 Logistics & Supply Chain
 - 3.7.5 Financial Services
 - 3.7.6 Security & Authentication
 - 3.7.7 Repair, Inspection & Field Services
 - 3.7.8 Education
- 3.8 Case Studies
 - 3.8.1 Appirio: Cutting Health Insurance Costs with Fitbit
 - 3.8.1.1 Solution & Vendors
 - 3.8.1.2 Applications
 - 3.8.1.3 Feedback from the Field
 - 3.8.2 AT&T: Connected Healthcare Monitoring for the Elderly
 - 3.8.2.1 Solution & Vendors
 - 3.8.2.2 Applications
 - 3.8.2.3 Feedback from the Field
 - 3.8.3 DHL: Implementing Vision Picking with Smart Glasses
 - 3.8.3.1 Solution & Vendors
 - 3.8.3.2 Applications

- 3.8.3.3 Feedback from the Field
- 3.8.4 Dubai Police: Catching Speeding Drivers with Google Glass
 - 3.8.4.1 Solution & Vendors
 - 3.8.4.2 Applications
 - 3.8.4.3 Feedback from the Field
- 3.8.5 Florida State University: Reducing Sports Injuries with Wearable Performance Tracking
 - 3.8.5.1 Solution & Vendors
 - 3.8.5.2 Applications
 - 3.8.5.3 Feedback from the Field
- 3.8.6 KDDI Corporation: Ensuring Child Safety with Smartwatches
 - 3.8.6.1 Solution & Vendors
 - 3.8.6.2 Applications
 - 3.8.6.3 Feedback from the Field
- 3.8.7 Medisafe: Improving Medication Adherence with Wearable Technology
 - 3.8.7.1 Solution & Vendors
 - 3.8.7.2 Applications
 - 3.8.7.3 Feedback from the Field
- 3.8.8 The Walt Disney Company: Theme Park Management with Wearable Technology
 - 3.8.8.1 Solution & Vendors
 - 3.8.8.2 Applications
 - 3.8.8.3 Feedback from the Field
- 3.8.9 U.S. Department of Defense: Delivering Tactical Information with Wearable Display Systems
 - 3.8.9.1 Solution & Vendors
 - 3.8.9.2 Applications
 - 3.8.9.3 Feedback from the Field
- 3.8.10 Virgin Atlantic Airways: Enhancing Airline Services with Wearable Technology
 - 3.8.10.1 Solution & Vendors
 - 3.8.10.2 Applications
 - 3.8.10.3 Feedback from the Field

4 CHAPTER 4: INDUSTRY ROADMAP & VALUE CHAIN

- 4.1 Wearable Technology Industry Roadmap
 - 4.1.1 Pre-2020: Growing Proliferation of Wearables & Emerging Business Models
 - 4.1.2 2020 – 2025: Increasing Focus on Enterprise Markets & Use Cases
 - 4.1.3 2025 – 2030: Growth in Mobile Operator Service Revenues

- 4.2 The Wearable Technology Value Chain
 - 4.2.1 Enabling Technology Ecosystem
 - 4.2.1.1 Chipset Vendors
 - 4.2.1.2 Sensor, Display & Enabling Hardware Providers
 - 4.2.1.3 OS & Software Providers
 - 4.2.1 Wearable Device OEM Ecosystem
 - 4.2.1.1 Vertical Centric OEMs
 - 4.2.1.2 Smartphone, Tablet & Consumer Electronics OEMs
 - 4.2.1.3 Fashion & Watch OEMs
 - 4.2.2 Consumers & Vertical Enterprises
 - 4.2.3 Mobile Operators & the Connectivity Ecosystem
 - 4.2.4 Applications Ecosystem

5 CHAPTER 5: MARKET SIZING & FORECASTS

- 5.1 Global Outlook for Wearable Technology
- 5.2 Form Factor Segmentation
- 5.3 Smart Bands
- 5.4 Smartwatches
 - 5.4.1 OS-Powered Smartwatches
 - 5.4.2 Basic Smartwatches
- 5.5 Smart Glasses
- 5.6 Smart Clothing
- 5.7 Smart Earwear
- 5.8 Smart Jewelry
- 5.9 Heads-up Display Systems
- 5.10 Others
- 5.11 Vertical Market Segmentation
- 5.12 Consumer Wearable Devices
- 5.13 Healthcare Wearable Devices
- 5.14 Professional Sports Wearable Devices
- 5.15 Retail & Hospitality Wearable Devices
- 5.16 Military Wearable Devices
- 5.17 Public Safety Wearable Devices
- 5.18 Wearable Devices in Other Verticals
- 5.19 Regional Market Segmentation
- 5.20 Asia Pacific
 - 5.20.1 Australia
 - 5.20.2 Bangladesh

- 5.20.3 China
- 5.20.4 Hong Kong
- 5.20.5 India
- 5.20.6 Indonesia
- 5.20.7 Japan
- 5.20.8 Malaysia
- 5.20.9 New Zealand
- 5.20.10 Pakistan
- 5.20.11 Philippines
- 5.20.12 Singapore
- 5.20.13 South Korea
- 5.20.14 Taiwan
- 5.20.15 Thailand
- 5.20.16 Vietnam
- 5.20.17 Rest of Asia Pacific
- 5.21 North America
 - 5.21.1 Canada
 - 5.21.2 USA
- 5.22 Western Europe
 - 5.22.1 Austria
 - 5.22.2 Belgium
 - 5.22.3 Denmark
 - 5.22.4 Finland
 - 5.22.5 France
 - 5.22.6 Germany
 - 5.22.7 Greece
 - 5.22.8 Ireland
 - 5.22.9 Italy
 - 5.22.10 Luxembourg
 - 5.22.11 Netherlands
 - 5.22.12 Norway
 - 5.22.13 Portugal
 - 5.22.14 Spain
 - 5.22.15 Sweden
 - 5.22.16 Switzerland
 - 5.22.17 Turkey
 - 5.22.18 UK
 - 5.22.19 Rest of Western Europe
- 5.23 Eastern Europe

- 5.23.1 Belarus
- 5.23.2 Bosnia & Herzegovina
- 5.23.3 Bulgaria
- 5.23.4 Croatia
- 5.23.5 Czech Republic
- 5.23.6 Hungary
- 5.23.7 Poland
- 5.23.8 Romania
- 5.23.9 Russia
- 5.23.10 Serbia
- 5.23.11 Slovakia
- 5.23.12 Ukraine
- 5.23.13 Uzbekistan
- 5.23.14 Rest of Eastern Europe
- 5.24 Middle East & Africa
 - 5.24.1 Algeria
 - 5.24.2 Egypt
 - 5.24.3 Israel
 - 5.24.4 Kenya
 - 5.24.5 Morocco
 - 5.24.6 Nigeria
 - 5.24.7 Qatar
 - 5.24.8 Saudi Arabia
 - 5.24.9 South Africa
 - 5.24.10 Sudan
 - 5.24.11 Tanzania
 - 5.24.12 Tunisia
 - 5.24.13 UAE
 - 5.24.14 Rest of the Middle East & Africa
- 5.25 Latin & Central America
 - 5.25.1 Argentina
 - 5.25.2 Bolivia
 - 5.25.3 Brazil
 - 5.25.4 Chile
 - 5.25.5 Colombia
 - 5.25.6 Ecuador
 - 5.25.7 Mexico
 - 5.25.8 Paraguay
 - 5.25.9 Peru

- 5.25.10 Uruguay
- 5.25.11 Venezuela
- 5.25.12 Rest of Latin & Central America

6 CHAPTER 6: KEY ECOSYSTEM PLAYERS

- 6.1 270 Vision
- 6.2 3L Labs
- 6.3 4DForce
- 6.4 4iii Innovations
- 6.5 9Solutions
- 6.6 Abbot Laboratories
- 6.7 Acer
- 6.8 AcousticSheep
- 6.9 Active Mind Technology
- 6.10 Adidas
- 6.11 AGPtek
- 6.12 AliveCor
- 6.13 Amazon
- 6.14 Amber Alert GPS
- 6.15 Ambit Networks
- 6.16 AMD (Advanced Micro Devices)
- 6.17 AngelSense
- 6.18 Aplus
- 6.19 Apple
- 6.20 ARA (Applied Research Associates)
- 6.21 Archos
- 6.22 ARM Holdings
- 6.23 Arrow Technologies
- 6.24 Arubixs
- 6.25 ASUS (ASUSTeK Computer)
- 6.26 Atellani
- 6.27 Atheer Labs
- 6.28 Atlas Wearables
- 6.29 Augmendix
- 6.30 Avegant
- 6.31 AVG
- 6.32 Axon
- 6.33 BAE Systems

- 6.34 Baidu
- 6.35 BBK Electronics Corporation/OPPO/Vivo
- 6.36 Beddit
- 6.37 Behavioral Technology Group
- 6.38 Bellabeat
- 6.39 BI (GEO Group)
- 6.40 Biosensics
- 6.41 Bitbanger Labs
- 6.42 Blocks Wearables
- 6.43 Bmorn
- 6.44 bOMDIC
- 6.45 Bondara (Nagook)
- 6.46 Boston Scientific Corporation
- 6.47 BRAGI
- 6.48 Breitling
- 6.49 Brother Industries
- 6.50 BSX Athletics
- 6.51 BTS Bioengineering
- 6.52 Bulgari
- 6.53 Caeden
- 6.54 Casio
- 6.55 Catapult Sports
- 6.56 Chronos Wearables
- 6.57 Citizen
- 6.58 Cityzen Sciences
- 6.59 Codoon
- 6.60 CommandWear
- 6.61 CompeGPS
- 6.62 Connect America
- 6.63 ConnecteDevice
- 6.64 Coeey
- 6.65 Cool Shirt Systems
- 6.66 Cordon
- 6.67 Creoir
- 6.68 Cyberdyne
- 6.69 Cypress Semiconductor Corporation
- 6.70 DAQRI
- 6.71 Dell
- 6.72 Dexcom

- 6.73 Dialog Semiconductor
- 6.74 DIGICare Technology
- 6.75 Digitsole
- 6.76 DK Tek Innovations
- 6.77 Doki Technologies
- 6.78 DorsaVi
- 6.79 Ducere
- 6.80 Ekso Bionics
- 6.81 Electric Foxy
- 6.82 Emotiv Systems
- 6.83 Empatica
- 6.84 Enjoy S.R.L
- 6.85 Epson (Seiko Epson Corporation)
- 6.86 EuroTech
- 6.87 Evena Medical
- 6.88 Exelis/Harris Corporation
- 6.89 EyeTap
- 6.90 FashionTEQ
- 6.91 Fat Shark
- 6.92 Fatigue Science
- 6.93 Finis
- 6.94 FitBark
- 6.95 Fitbit
- 6.96 Flex
- 6.97 Force Impact Technologies
- 6.98 Fossil Group /Misfit
- 6.99 FOVE
- 6.100 Fujitsu
- 6.101 Garmin
- 6.102 GEAK (Shanda Group)
- 6.103 Gemalto/Thales
- 6.104 General Dynamics Mission Systems
- 6.105 Ginger.io
- 6.106 GlassUp
- 6.107 Glofaster
- 6.108 GN Store Nord
- 6.109 Google/Alphabet
- 6.110 GoPro
- 6.111 GOQii

- 6.112 Guess
- 6.113 HealBe
- 6.114 HereO
- 6.115 Hexoskin (Carre Technologies)
- 6.116 Hollywog
- 6.117 Honeywell International
- 6.118 Hövding
- 6.119 HP
- 6.120 HTC Corporation
- 6.121 Huami
- 6.122 Huawei
- 6.123 iBerry
- 6.124 ICEdot
- 6.125 ICON Health and Fitness
- 6.126 iHealth Labs
- 6.127 iLOC Technologies
- 6.128 Imagination Technologies
- 6.129 Imec International
- 6.130 Immerz
- 6.131 IMU (I Measure U)
- 6.132 Ineda Systems
- 6.133 Innovega
- 6.134 Instabeat
- 6.135 Intel Corporation
- 6.136 InteraXon
- 6.137 Intex Technologies
- 6.138 InvenSense
- 6.139 Iotera
- 6.140 iRhythm Technologies
- 6.141 Iron Will Innovations
- 6.142 Jaguar Land Rover
- 6.143 Jaybird
- 6.144 JINS (JIN CO.)
- 6.145 Johnson & Johnson
- 6.146 Joyray Technology
- 6.147 Kairos Watches
- 6.148 Kerv Wearables
- 6.149 Ki Performance Lifestyle
- 6.150 Kiwi Wearable Technologies

- 6.151 KMS Solutions
- 6.152 Kokoon
- 6.153 Kopin Corporation
- 6.154 KoruLab
- 6.155 Kronoz
- 6.156 Kuaiwear
- 6.157 L3 Technologies
- 6.158 Laster Technologies
- 6.159 Le Vise Products
- 6.160 Leaf Healthcare
- 6.161 LeapFrog Enterprises/VTech
- 6.162 Lenovo/Motorola Mobility
- 6.163 Lepow
- 6.164 Levi Strauss & Co.
- 6.165 LG Electronics
- 6.166 LifeBEAM
- 6.167 LifeLogger Technologies Corporation
- 6.168 Limmex
- 6.169 Lineable
- 6.170 Linkitz
- 6.171 Liquid Image
- 6.172 Livall
- 6.173 Lockheed Martin Corporation
- 6.174 LOSTnFOUND
- 6.175 Lumafit
- 6.176 Lumo BodyTech
- 6.177 Lumos
- 6.178 Lumus
- 6.179 Luxottica
- 6.180 Lycos
- 6.181 Lyle & Scott
- 6.182 Mad Apparel
- 6.183 Magellan (MiTAC Digital Corporation)
- 6.184 MainTool
- 6.185 Martian Watches
- 6.186 Matilde
- 6.187 Mattel
- 6.188 MC10
- 6.189 McLear

- 6.190 MediaTek
- 6.191 Medtronic
- 6.192 Merge Labs
- 6.193 META
- 6.194 Microsoft Corporation
- 6.195 Mio Global
- 6.196 Moff
- 6.197 Mondaine Watch
- 6.198 Mondevices
- 6.199 Montblanc
- 6.200 Moov
- 6.201 Moticon
- 6.202 Motion Fitness
- 6.203 Mozilla Corporation
- 6.204 Mutualink
- 6.205 Myontec
- 6.206 Neptune
- 6.207 NeuroPro
- 6.208 NeuroSky
- 6.209 New Balance
- 6.210 Nike
- 6.211 Nixie Labs
- 6.212 Nixon
- 6.213 Nokia
- 6.214 Nortek Security & Control
- 6.215 Notch Interfaces
- 6.216 Now Computing
- 6.217 NTT DoCoMo
- 6.218 Nuance Communications
- 6.219 Nuubo
- 6.220 NVIDIACorporation
- 6.221 NXP Semiconductors
- 6.222 Nymi
- 6.223 NZN Labs
- 6.224 OAXIS
- 6.225 Oculus VR/Facebook
- 6.226 ODG (Osterhout Design Group)
- 6.227 Omate
- 6.228 Omron Corporation

- 6.229 OMsignal
- 6.230 Opening Ceremony
- 6.231 Optalert
- 6.232 Optinvent
- 6.233 OrCam Technologies
- 6.234 OriginGPS
- 6.235 Orion Labs
- 6.236 Orpyx Medical Technologies
- 6.237 O-Synce
- 6.238 ?URA
- 6.239 Owlet Baby Care
- 6.240 Panasonic Corporation
- 6.241 Perceptive Devices
- 6.242 Perpetua Power Source Technologies
- 6.243 PFO Tech
- 6.244 PHTL (PH Technical Labs)
- 6.245 Pivothead
- 6.246 Pixie Scientific
- 6.247 Plantronics
- 6.248 PNI Sensor
- 6.249 Polar Electro
- 6.250 Preventice Solutions
- 6.251 Proteus Digital Health
- 6.252 Pulse
- 6.253 PUSH
- 6.254 Qardio
- 6.255 Qualcomm
- 6.256 Ralph Lauren
- 6.257 Raytheon Company
- 6.258 Razer
- 6.259 Recon Instruments
- 6.260 Reebok International
- 6.261 Reemo
- 6.262 Rest Devices
- 6.263 ReVault
- 6.264 Revolutionary Tracker
- 6.265 Ringly
- 6.266 Rooti Labs
- 6.267 RSL Steeper Group

- 6.268 Rufus Labs
- 6.269 S3 ID
- 6.270 Safelet
- 6.271 Salesforce.com
- 6.272 Salutron
- 6.273 Samsung Electronics
- 6.274 Sarvint Technologies
- 6.275 Seiko Holdings Corporation
- 6.276 SenseGiz Technologies
- 6.277 Sensiia
- 6.278 Senso Solutions
- 6.279 Sensoplex
- 6.280 Sensoria
- 6.281 Sentimoto
- 6.282 Shenzen Smart Co.
- 6.283 Shenzhen Glory Union Electronic Company
- 6.284 ShiftWear
- 6.285 Shimmer
- 6.286 ShotTracker
- 6.287 Si14
- 6.288 SIGMA-ELEKTRO
- 6.289 Simple Matters
- 6.290 SmartCap Technologies (EdanSafe)
- 6.291 SMI (SensoMotoric Instruments)
- 6.292 SMS Audio
- 6.293 Snap (Formerly Snapchat)
- 6.294 Snowpow (Shenzhen Snopow Outdoor Technology)
- 6.295 Somaxis
- 6.296 Sony Corporation
- 6.297 Sotera Wireless
- 6.298 Soundbrenner
- 6.299 Spice Mobiles
- 6.300 Spire
- 6.301 SpotNSave
- 6.302 Spree Wearables
- 6.303 Sproutling/Fisher-Price/Mattel
- 6.304 Sqord
- 6.305 Stalker Radar (Applied Concepts)
- 6.306 Starbreeze Studios

- 6.307 STATSports
- 6.308 STMicroelectronics
- 6.309 Striiv
- 6.310 Sunbeam Products/Newell Rubbermaid
- 6.311 Suunto
- 6.312 Swatch Group
- 6.313 T.Ware
- 6.314 Tag Heuer
- 6.315 TCL Communication
- 6.316 Thalmic Labs
- 6.317 Theatro
- 6.318 Thimble Bioelectronics
- 6.319 TI (Texas Instruments)
- 6.320 Timex Group
- 6.321 TLink Golf
- 6.322 TN Games
- 6.323 Tobii Group
- 6.324 TomTom
- 6.325 Touch Bionics
- 6.326 TrackingPoint
- 6.327 Trivoly Technology
- 6.328 Ubimax
- 6.329 U-blox
- 6.330 Under Armour
- 6.331 Valencell
- 6.332 Validic (Motivation Science)
- 6.333 Vancive Medical Technologies (Avery Dennison Corporation)
- 6.334 Vigo
- 6.335 VSN Mobil
- 6.336 Vuzix
- 6.337 Wahoo Fitness
- 6.338 Wavelet Health
- 6.339 Wearable X
- 6.340 Weartrons Labs
- 6.341 Weenect
- 6.342 Wellograph
- 6.343 Whereables B.V.
- 6.344 Whistle Labs
- 6.345 Whoop

- 6.346 WorldSIM
- 6.347 WTS (Wonder Technology Solutions)
- 6.348 Xdream (TickTalk)
- 6.349 Xensr
- 6.350 Xiaomi
- 6.351 Xmetrics
- 6.352 XOEye Technologies
- 6.353 Xybermind
- 6.354 Yingqu Technology
- 6.355 Yost Labs
- 6.356 Zackees
- 6.357 Zebra Technologies
- 6.358 ZEISS
- 6.359 Zephyr Technology Corporation
- 6.360 Zepp Labs
- 6.361 ZGPax (Shenzhen PGD Digital Technology)
- 6.362 Zoll Medical Corporation
- 6.363 ZTE

7 CHAPTER 7: CONCLUSION, KEY TRENDS & STRATEGIC RECOMMENDATIONS

- 7.1 Why is the Market Poised to Grow?
- 7.2 Competitive Industry Landscape: Acquisitions, Alliances & Consolidation
- 7.3 Vendor Share: Who Leads the Market?
- 7.4 Prospects of Smartphone OEMs in the Wearable Technology Ecosystem
- 7.5 Wearable Technology Operating Systems: Is there a Dominant Market Leader?
- 7.6 How is Wearable Technology Affecting the Cellular Chipsets Ecosystem?
- 7.7 5G NR (New Radio), Cellular IoT & ProSe (Proximity Services): Impact on Wearables
- 7.8 Mobile Operators: The Service Revenue Opportunity
- 7.9 Standardization & Regulation
- 7.10 Combining Fashion with Technology
- 7.11 Emergence of New Form Factors: From Hearables to Ingestibles
- 7.12 How Big is the Wearable Applications Ecosystem?
- 7.13 Moving Towards New Applications & Business Models
 - 7.13.1 Healthcare Monitoring & Wellness Programs
 - 7.13.2 Sports Performance Analytics
 - 7.13.3 Smart Home Management
 - 7.13.4 Child Safety & Entertainment

- 7.13.5 Other Application Areas
- 7.14 Prospects of Fitness & Sports Centric Wearables
- 7.15 Recommendations
 - 7.15.1 Enabling Technology Providers
 - 7.15.2 Wearable Device OEMs & Vertical Players
 - 7.15.3 Wearable Application Developers
 - 7.15.4 Mobile Operators

List Of Figures

LIST OF FIGURES

Figure 1: In-Body Pill Camera

Figure 2: KOR-FX Haptic Feedback Vest

Figure 3: DARPA's ULTRA-VIS Wearable Display Unit and Augmented Reality View

Figure 4: AT&T's EverThere Wearable Device

Figure 5: Summary of DHL's Vision Picking Pilot

Figure 6: Catapult OptimEye S5 Athlete Tracking Technology

Figure 7: KDDI's mamorino Watch for Children

Figure 8: Medisafe App on a Smartwatch

Figure 9: Key Functional Capabilities of Disney's MagicBand

Figure 10: U.S. Army's TAR (Tactical Augmented Reality) System View

Figure 11: Wearable Devices for Virgin Atlantic's Concierge & Engineering Staff

Figure 12: Wearable Technology Industry Roadmap

Figure 13: Wearable Technology Value Chain

Figure 14: Global Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 15: Global Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 16: Global Wearable Device Shipments by Form Factor: 2018 – 2030 (Millions of Units)

Figure 17: Global Wearable Device Shipment Revenue by Form Factor: 2018 – 2030 (\$ Million)

Figure 18: Global Smart Band Shipments: 2018 – 2030 (Millions of Units)

Figure 19: Global Smart Band Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 20: Global OS-Powered Smartwatch Shipments: 2018 – 2030 (Millions of Units)

Figure 21: Global OS-Powered Smartwatch Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 22: Global Basic Smartwatch Shipments: 2018 – 2030 (Millions of Units)

Figure 23: Global Basic Smartwatch Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 24: Global Smart Glasses Shipments: 2018 – 2030 (Millions of Units)

Figure 25: Global Smart Glasses Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 26: Global Smart Clothing Shipments: 2018 – 2030 (Millions of Units)

Figure 27: Global Smart Clothing Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 28: Global Smart Earwear Shipments: 2018 – 2030 (Millions of Units)

Figure 29: Global Smart Earwear Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 30: Global Smart Jewelry Shipments: 2018 – 2030 (Millions of Units)

Figure 31: Global Smart Jewelry Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 32: Global Heads-up Display System Shipments: 2018 – 2030 (Millions of Units)

Figure 33: Global Heads-up Display System Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 34: Global Other Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 35: Global Other Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 36: Global Wearable Device Shipments by Vertical: 2018 – 2030 (Millions of Units)

Figure 37: Global Wearable Device Shipment Revenue by Vertical: 2018 – 2030 (\$ Million)

Figure 38: Global Consumer Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 39: Global Consumer Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 40: Global Healthcare Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 41: Global Healthcare Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 42: Global Professional Sports Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 43: Global Professional Sports Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 44: Global Retail & Hospitality Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 45: Global Retail & Hospitality Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 46: Global Military Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 47: Global Military Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 48: Global Public Safety Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 49: Global Public Safety Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 50: Global Wearable Device Shipments in Other Verticals: 2018 – 2030 (Millions of Units)

Figure 51: Global Wearable Device Shipment Revenue in Other Verticals: 2018 – 2030 (\$ Million)

Figure 52: Wearable Device Shipments by Region: 2018 – 2030 (Millions of Units)

Figure 53: Wearable Device Shipment Revenue by Region: 2018 – 2030 (\$ Million)

Figure 54: Asia Pacific Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 55: Asia Pacific Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 56: Australia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 57: Australia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 58: Bangladesh Wearable Device Shipments: 2018 – 2030 (Millions of Units)

- Figure 59: Bangladesh Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 60: China Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 61: China Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 62: Hong Kong Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 63: Hong Kong Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 64: India Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 65: India Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 66: Indonesia Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 67: Indonesia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 68: Japan Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 69: Japan Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 70: Malaysia Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 71: Malaysia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 72: New Zealand Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 73: New Zealand Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 74: Pakistan Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 75: Pakistan Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 76: Philippines Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 77: Philippines Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 78: Singapore Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 79: Singapore Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 80: South Korea Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 81: South Korea Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 82: Taiwan Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 83: Taiwan Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 84: Thailand Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 85: Thailand Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 86: Vietnam Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 87: Vietnam Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 88: Rest of Asia Pacific Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 89: Rest of Asia Pacific Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 90: North America Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 91: North America Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 92: Canada Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 93: Canada Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)
- Figure 94: USA Wearable Device Shipments: 2018 – 2030 (Millions of Units)
- Figure 95: USA Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 96: Western Europe Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 97: Western Europe Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 98: Austria Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 99: Austria Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 100: Belgium Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 101: Belgium Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 102: Denmark Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 103: Denmark Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 104: Finland Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 105: Finland Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 106: France Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 107: France Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 108: Germany Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 109: Germany Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 110: Greece Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 111: Greece Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 112: Ireland Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 113: Ireland Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 114: Italy Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 115: Italy Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 116: Luxembourg Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 117: Luxembourg Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 118: Netherlands Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 119: Netherlands Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 120: Norway Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 121: Norway Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 122: Portugal Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 123: Portugal Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 124: Spain Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 125: Spain Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 126: Sweden Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 127: Sweden Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 128: Switzerland Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 129: Switzerland Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 130: Turkey Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 131: Turkey Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 132: UK Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 133: UK Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 134: Rest of Western Europe Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 135: Rest of Western Europe Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 136: Eastern Europe Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 137: Eastern Europe Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 138: Belarus Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 139: Belarus Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 140: Bosnia & Herzegovina Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 141: Bosnia & Herzegovina Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 142: Bulgaria Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 143: Bulgaria Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 144: Croatia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 145: Croatia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 146: Czech Republic Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 147: Czech Republic Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 148: Hungary Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 149: Hungary Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 150: Poland Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 151: Poland Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 152: Romania Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 153: Romania Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 154: Russia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 155: Russia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 156: Serbia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 157: Serbia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 158: Slovakia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 159: Slovakia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 160: Ukraine Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 161: Ukraine Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 162: Uzbekistan Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 163: Uzbekistan Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 164: Rest of Eastern Europe Wearable Device Shipments: 2018 – 2030 (Millions

of Units)

Figure 165: Rest of Eastern Europe Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 166: Middle East & Africa Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 167: Middle East & Africa Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 168: Algeria Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 169: Algeria Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 170: Egypt Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 171: Egypt Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 172: Israel Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 173: Israel Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 174: Kenya Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 175: Kenya Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 176: Morocco Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 177: Morocco Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 178: Nigeria Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 179: Nigeria Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 180: Qatar Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 181: Qatar Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 182: Saudi Arabia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 183: Saudi Arabia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 184: South Africa Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 185: South Africa Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 186: Sudan Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 187: Sudan Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 188: Tanzania Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 189: Tanzania Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 190: Tunisia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 191: Tunisia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 192: UAE Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 193: UAE Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 194: Rest of the Middle East & Africa Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 195: Rest of the Middle East & Africa Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 196: Latin & Central America Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 197: Latin & Central America Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 198: Argentina Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 199: Argentina Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 200: Bolivia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 201: Bolivia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 202: Brazil Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 203: Brazil Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 204: Chile Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 205: Chile Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 206: Colombia Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 207: Colombia Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 208: Ecuador Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 209: Ecuador Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 210: Mexico Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 211: Mexico Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 212: Paraguay Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 213: Paraguay Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 214: Peru Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 215: Peru Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 216: Uruguay Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 217: Uruguay Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 218: Venezuela Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 219: Venezuela Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 220: Rest of Latin & Central America Wearable Device Shipments: 2018 – 2030 (Millions of Units)

Figure 221: Rest of Latin & Central America Wearable Device Shipment Revenue: 2018 – 2030 (\$ Million)

Figure 222: Global Wearable Device Unit Shipment Breakdown by Form Factor: 2021 (%)

Figure 223: Global Wearable Device Shipment Market Share by Vendor: 2017 (%)

Figure 224: Global Cellular Chipset Shipments for Wearable Devices: 2018 – 2030 (Millions of Units)

Figure 225: Global Wearable Driven Mobile Operator Service Revenue by Form Factor: 2018 – 2030 (\$ Million)

Figure 226: Fashion Centric Wearables

Figure 227: Global Wearable Applications Ecosystem Revenue by Vertical: 2018 – 2030 (\$ Million)

Figure 228: Global Wrist-Worn Wearable Device Shipments by Key Application Areas:

2018 – 2030 (Millions of Units)

Figure 229: Global Fitness & Sports Centric Wearable Device Shipments by Category:

2018 – 2030 (Millions of Units)

Figure 230: Global Fitness & Sports Centric Wearable Device Shipment Revenue by Category: 2018 – 2030 (\$ Million)

About

Proliferation of Smartphones

The proliferation of smartphones is widely seen as a major driving force behind wearable technology. In 2014 alone, the installed base of smartphones stands at over 2.4 Billion, representing global penetration of nearly 35%. The penetration is further expected to increase to over 60% by the end of 2020.

Smartphone Installed Base by Region (Millions): 2014 – 2020

Given their mass market adoption, smartphones often serve as the wireless connectivity hub for most wearable devices (at least for the time being). Wearable form factors such as smart watches or smart glasses are thus widely seen as companion devices for smartphones. By offloading processing and connectivity onto a smartphone, the cost of a wearable device is considerably cheaper, even more so considering the price of sensors keeps dropping.

Enhancing Situational Awareness in the Battlefield

Being aware of one's surroundings is a major challenge for soldiers on chaotic battlefields. Wearable technology can greatly assist with this, by combining a virtual display overlay with information from reconnaissance and other soldiers. As part of its ULTRA-VIS2 program, DARPA³ has developed a low-powered, light weight wearable display system for dismounted ground troops. The displays can significantly enhance situational awareness by displaying a range of non-line-of-sight information in front of the soldier's eyes. The augmented reality view includes information such as the location of nearest friendly units, distance to objective, and satellite images of the area.

A similar display unit from Raytheon allows military pilots to see, feel and hear everything going on around their helicopter or plane without necessarily having to be physically seated in the cockpit. The Aviation Warrior display unit provides pilots a 360-degree view by using the airplane's sensors and overlaying it on a translucent screen attached to the helmet.

Enabling Battlefield Mobility

Wearable technology can also help improve mobility in the battlefield. For example, a solar energy kit developed by universities⁴ in the United Kingdom enables the military uniform to use photovoltaic cells to harness the sun's energy, as well as thermoelectric devices to turn temperature differentials into electricity. The energy kit significantly alleviates the weight⁵ of traditional backpacks containing batteries that soldiers have to carry to have power supply for different devices. In addition, by eliminating the need to return to base for recharging, the solar pack also increases the potential range and duration of military operations.

Facilitating Communications with Military Dogs

Wearable technology can also facilitate communications with military dogs. For example, using the FIDO6 system, a bomb-sniffing dog could be trained to activate a specific kind of sensor for a specific kind of bomb, instantly alerting its trainer to the threat.

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