

# Enterprise Wearables Market - Global Outlook and Forecast 2020-2025

<https://marketpublishers.com/r/EDD59DC05F64EN.html>

Date: April 2020

Pages: 352

Price: US\$ 3,500.00 (Single User License)

ID: EDD59DC05F64EN

## Abstracts

With the Purchase of Enterprise Wearables Market Report,

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The global enterprise wearables market is expected to grow at a CAGR of over 41% during the period 2019–2025.

The wide adoption of Bring Your Own Devices (BYOD), which have successfully been adopted by IT companies, is likely to increase the demand for smart wearables. Several progressive organizations are utilizing wearable devices in the professional space, which is expected to improve operational effectiveness. Watches, glasses, and body monitors tend to serve as effective devices for workplace applications. The trend to enable the employee to bring their own wearables to the workplace will eventually lead to the overall boost productivity. A few IT organizations are promoting the use of customized devices along with BYOW, which further leads to market growth.

The increased awareness of smart apparel to improve working conditions and safety levels among workers is driving the market. Oil & gas industries serve as the forerunner and the ideal end-users for the use of smart clothing. For instance, BP is making efforts to develop a wearable jacket with sensors to monitor the physical movement of the employee and train the personnel through remote guidance features. By leveraging wireless connectivity, sensors, AI technology, and wearing enhancements, the smart clothing segment is expected to witness a surge in demand from oil & gas, mining industries. Therefore, the growing responsiveness to the safety and security of workers will serve as a major factor driving demand for smart clothing for enterprises.

The following factors are likely to contribute to the growth of the enterprise wearables market during the forecast period:

Growth in Bring Your Own Wearable

Development of Smart Clothing

Growth in Need for Tracking Workplace Wellness

Increased Adoption of IoT in Enterprises

The study considers the present scenario of the enterprise wearables market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

#### Enterprise Wearables Market: Segmentation

This research report includes a detailed segmentation by Product Type, End-user, Connectivity, and Geography. Wrist wears were the dominant segment in the enterprise wearables market in 2019, and the segment expected to sustain its position during the forecast period. As wristwatches and fitness trackers are utilized to monitor health, fitness, heart rates, attendance, authorization, and biometric procedures, the scope and potential for the end-user are high across industries. Further, the presence of a significant number of players with affordable products is fueling the demand in the market. As the gadget is no longer seen as a fashion statement, the competition is gaining momentum based on the technological edge. North America was estimated as the largest wristwear market in 2019, which is closely followed by Europe and APAC.

While the healthcare sector is the dominant application segment, oil, mining, and construction end-users are expected to offer substantial growth opportunities vendors during the forecast period. The UK and Germany are considered to be global leaders in adopting the latest innovations in the medical sector. The highly sophisticated patient monitoring, diagnosis, treatment, remote consulting in Europe is expected to stimulate demand in the next five years. Smartwatches, bands, and smart rings are the most preferred devices in the segment, where Bluetooth and Wi-Fi are the major sources of connecting platforms.

The automotive industry is one of the fastest-growing industries in the adoption of enterprise wearable technology during the forecast period. While major automotive manufacturers such as Ford, BMW, and Audi have already implemented wearable solutions, the prominence in other automotive industries is expected to increase in the next five years. The IT industry is expected to implement wearables to increase employee liability by creating customized programs that can improve overall well-being, increasing the affinity for workers, and helping the employer's cost-control better. Enterprises are already utilizing these technologies to follow the health of their employees.

While the Bluetooth segment is likely to continue its dominance in terms of revenue, the cellular and NFC segment being the most utilized forms of connectivity is expected to grow the fastest CAGR during the forecast period. The Bluetooth platform is embedded in most smartwatches. However, Wi-Fi-based connectivity is ideal for employees being deployed at remote workplaces as it facilitates high-speed integration and seamless engagement. Wi-Fi is the preferable connectivity mode for oil, gas, mining and other large warehousing enterprises, Europe contributed over 34% to the total market in 2019; however, the APAC region is expected to grow at the fastest CAGR during the forecast period in terms of revenue. The healthcare segment is expected to propel the demand for Wi-Fi-based devices where processes such as operations management, remote patient monitoring, glucose monitoring, IoT enabled hearing aids, and interoperability are expected to make use of the technology. The decreasing overall cost and high opportunities offered by IoT-based devices through Wi-Fi connectivity is expected to serve as a hotspot for innovations. The cellular and near-field communication (NFC) segment is expected to reach over \$10 billion by 2025. The growth in contactless payments, authorization in retail enterprises, and the introduction of 5G is expected to boost the adoption in the coming years. The Bluetooth segment, which also includes the Bluetooth Low Energy segment, is expected to grow at a CAGR of over 37%. The low investment cost and feasible access can further fuel the growth of the Bluetooth segment. However, limited connectivity challenges can hinder the adoption of smart glasses and clothing.

## Market Segmentation by Product Type

Wrist Wear

Eyewear

Arm wear

Headwear

Others

### Market Segmentation by Connectivity

Bluetooth

WIFI

Cellular & NFC

### Market Segmentation by End-users

Healthcare

Retail

IT & Telecom

Oil & Gas and Mining

Logistics & Warehousing

Construction

Automotive

Transportation & Hospitality

Others

### Insights By Geography

With wearables being adopted in public safety, military, and aerospace industries, the North America region offers immense opportunities. The rise in the number of solutions and technology providers in the region can aid in the adoption. The tech companies are implementing digital and IoT-based wearable solutions in several industries, such as healthcare, construction, manufacturing, and retail sectors. Moreover, the presence of recognized IoT-based enterprises such as Canvass Analytics, Raven Telemetry, and Terrene, making efforts to digitize the manufacturing process through IoT based solutions, is driving the growth of the enterprise wearables market. Most automotive industries are increasing the application of wearable technology such as smart glasses, which are expected to grow the market in the coming years.

Europe is expected to generate incremental revenue of over \$10 billion in the next five years. With the UK and Germany being the forerunners in the adoption of medical wearables, the automotive industry in Italy, Spain, and Portugal serve as the hotspot for smart glasses and wrist wears. The digital transformation in the oil & gas and mining industries is set to dominate the enterprise wearables market further. As tech-oriented countries in the region are more focused on artificial intelligence, and virtual reality technology, the expensive high-end devices such as HoloLens and Google Glass have a higher success ratio. With Germany being the largest IoT investor in 2019 by spending over \$35 billion, the spending on IoT solutions in the European region is expected to reach over \$255 billion by 2025.

The APAC region is likely to grow at the fastest CAGR during the forecast period. China, Japan, South Korea, Australia, India, Indonesia, Singapore, and Thailand are considered untapped markets with a wide window of opportunity. As the region is highly industry-oriented, wearable tech companies can target the petroleum mining, automotive, and logistics industries based on the risk imposed by the working environment. The digital revolution, industry 4.0, smart manufacturing, and growth in wearable device policy can influence growth. With the aging people in countries such as Japan and South Korea, they can serve as the hotspot for innovations in the healthcare segment.

### Key Profiled Countries

US

Canada

Germany

UK

France

Spain

Italy

China

Japan

Australia

South Korea

India

Brazil

Mexico

South Africa

Saudi Arabia

UAE

Turkey

## Insights By Vendors

The enterprise wearables market consists of a few significant vendors. As the product is based on technology and back-end software processing, the investment in R&D is highly crucial in sustaining an edge in the competitive market. However, customizable demands, successful collaborations, and partnerships, utilizing the IoT investments, tapping the potential markets with mergers and acquisitions, and price considerations

can play a major role in the enterprise wearables market during the forecast period. Further, mounting configurations and freedom of attachments can lead to a high satisfaction level. The context of raising funds and investments can serve as a key enabler to afford future solutions for the market. It will be ideal for vendors to ramp up development efforts for both existing and new product categories.

#### Key Vendors

Google

Samsung

Microsoft

Vuzix

Apple

#### Other Prominent Vendors

Xiaomi

Seiko Epson

Pico

RealWear

Recon

Optivent

Osterhout Design Group (ODG)

North

Nymi

SmartCap

DAQRI

Dynabook Inc.

Pro Glove

Motorola

Sony

Pivothead

Wisewear

Zebra Technologies

Withings

Ellice Healthy

Fujitsu

## Key Market Insights

The analysis of the enterprise wearables market provides sizing and growth opportunities for the period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the market.



Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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