

Wearable Technology: Inc Impact of COVID-19 - UK - November 2020

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This report looks at the following areas:

- The short-, medium- and long-term impact of COVID-19 on wearable technology, including changing usage habits and buying intentions.
- The growing popularity of smart earbuds, which brands are the more popular, which features are most important to consumers and which innovations can enable companies to earn market share.
- Ownership of smartwatches, which brands are most popular and how consumers' usage of these devices has changed since last year.
- Consumers' interest in niche wearable technology products like smart glasses, smart clothing and smart jewellery, and potential barriers to purchase.

While 37% of consumers agree that smart glasses with facial recognition should be banned from public spaces, it rises to 48% for Generation Z and Younger Millennials specifically. This is significant because these are the age groups that are the most interested in buying smart glasses. Major social companies including Facebook and Snapchat are investing in smart glasses. Therefore, it is possible that we could see an automatic tagging feature for pictures and video taken from these glasses. With many consumers uncomfortable with face recognition right now, the smart-glasses manufacturers that focus on privacy are likely to be most successful.

COVID-19 is likely to be a key driver behind the significant growth in use of smartwatches to track exercise that has occurred in the last year. Some 57% of smartwatch owners now say tracking exercise is in their top three activities for the devices. This is compared to 44% of smartwatch owners who used their device to track exercise in 2019. Exercise is a key way to reduce stress, and enabling consumers to monitor their stress levels before and after specific types of exercise is an example of an important way smartwatch manufacturers can evolve their offerings to provide a more holistic appeal.



“Smart earbuds remain the fastest-growing wearable technology product. The increasing reliance on voice control puts Amazon in a strong position to gain market share with its Echo Buds, which support Alexa, Siri and Google Assistant.”

- Zach Emmanuel, Consumer Technology Analyst, 12 November, 2020

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Not only do consumers value privacy in terms of face recognition on smart glasses, but across the whole wearables industry. Some 54% of consumers agree that concerns over privacy would influence their choice of wearable technology brand. With smart earbuds being the fastest-growing wearable technology item – ownership is at 15% now compared to 10% in 2019 – there is a major threat in relation to the privacy of voice assistants on these devices. Some 24% of smart earbud owners use the voice assistant on their device. Devices like the Amazon Echo Buds and AirPods Pro include the always-on functionality, which can be manually muted or turned off. Therefore, it is likely to be appealing if earbuds can automatically learn to mute themselves, based on prior usage.

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