

Global Wearable Device Market: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the global market of wearable devices with the following conditions:

1. Research period: September 2015 to March 2016
2. Research target: Manufacturers of mobile phones and wearable devices, wearable service providers, telecommunication enterprises, domestic semiconductor manufacturers, and overseas ODM/EMS businesses
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/e-mail, and literature research

<What a Wearable Device?>

A wearable device is a general term of an IT device that can be attached on human body to use contents through the internet or cloud services by aligning them with smart phones or by itself being standalone.

The wearable device market in this research is categorized into the following five devices: 1) smart watches, 2) smart bands, 3) smart glasses, 4) HMD (head-mount displays), and 5) others. The market size has been calculated based on the shipment volume at manufacturers. Note that the domestic smart band market targets only those health devices that can align with smartphones, including activity trackers and sleep meters.

◆ Key Findings

■ **Global Shipment of Wearable Devices Projected to Attain 71,059 Thousand in 2015, and 322,780 Thousand by 2020**

Size of the global wearable device market in 2015, based on the shipment volume at manufacturers, reached 71,059 thousand units, among which smart bands attained 46,370 thousand, smart watches 22,180 thousand, HMDs 874 thousand, smart glasses 780 thousand, and others 855 thousand. The market is driven by inexpensive smart bands and by smart watches developed by growing number of market players. The global wearable device market is likely to expand by 164.1% to attain 116.634 million units by 2016, and is considered to achieve 322.780 million units by 2020.

■ **Domestic Shipment of Wearable Devices in 2015 Projected to Achieve 2,092 Thousand in 2015, and 11,600 Thousand Units by 2020**

Size of the domestic wearable device market in 2015, based on the shipment volume at manufacturers reached 2,092 thousand units, among which smart bands shipped 1,405 thousand units, smart watches 615 thousand, smart glasses 39 thousand, HMD 16 thousand, and others 17 thousand. The market is driven by smart bands mainly due to consumers' health consciousness. The entire domestic wearable device market size is projected to increase by 171.4% to achieve 3,585 thousand units in 2016, and is considered to attain 11,600 thousand units by 2020.

◆ **Report format:**

Published Report “Global Market of Smart Phones/Tablets/Wearables/Smart Devices 2016-2017”

Issued on: March 11, 2016

Language: Japanese

Format: 518 pages in A4 format

Price: 250,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

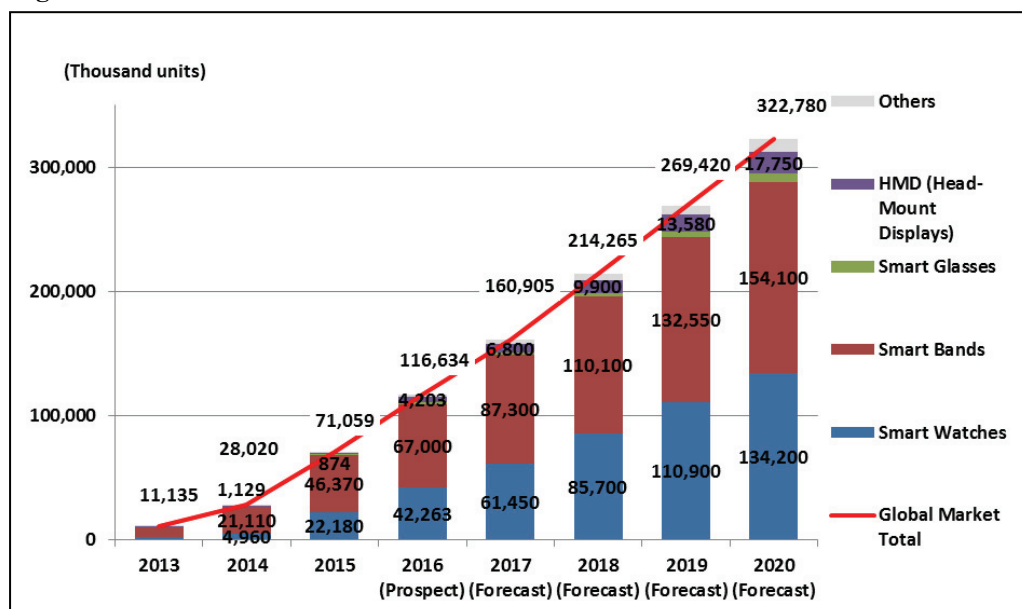
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■ **Figure & Table 1: Transition and Forecast of Global Market Size of Wearable Devices**



	2013	2014	2015	2016 (Prospect)	2017 (Forecast)	2018 (Forecast)	2019 (Forecast)	2020 (Forecast)
Smart Watches	1,858	4,960	22,180	42,263	61,450	85,700	110,900	134,200
Smart Bands	8,192	21,110	46,370	67,000	87,300	110,100	132,550	154,100
Smart Glasses	88	418	780	1,308	2,085	3,250	4,800	6,700
HMD (Head-Mount Displays)	887	1,129	874	4,203	6,800	9,900	13,580	17,750
Others	110	403	855	1,860	3,270	5,315	7,590	10,030
Global Market Total	11,135	28,020	71,059	116,634	160,905	214,265	269,420	322,780

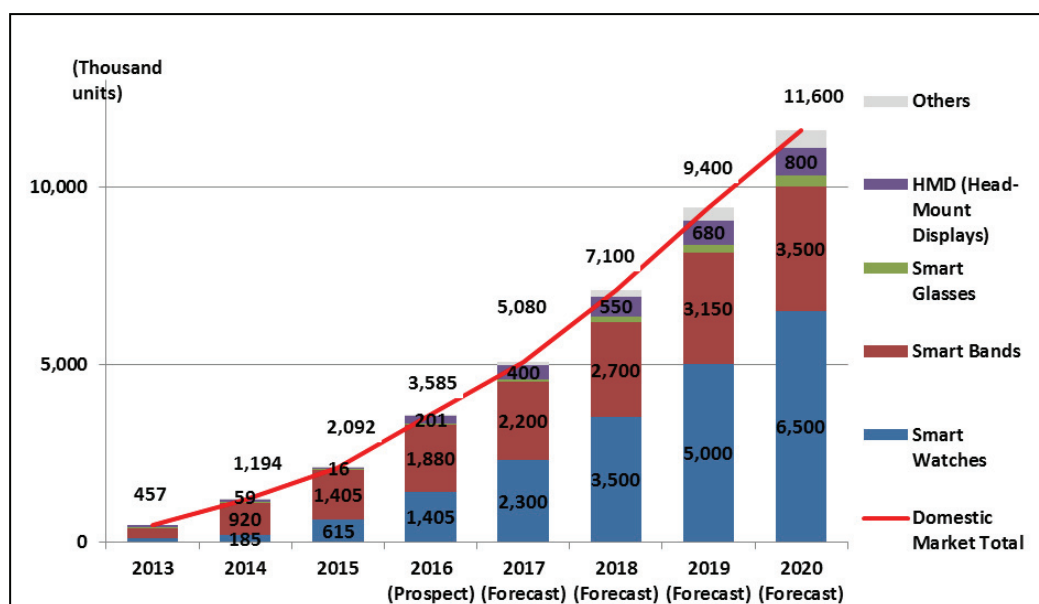
Unit : 1,000 Units

Estimated by Yano Research Institute

Notes:

1. The market size is based on the shipment volume of manufacturers.

■ Figure &Table 2: Transition and Forecast of Domestic Market Size of Wearable Devices



Category/Year	2013	2014	2015	2016 (Prospect)	2017 (Forecast)	2018 (Forecast)	2019 (Forecast)	2020 (Forecast)
Smart Watches	95	185	615	1,405	2,300	3,500	5,000	6,500
Smart Bands	297	920	1,405	1,880	2,200	2,700	3,150	3,500
Smart Glasses	1	23	39	54	80	150	220	300
HMD (Head-Mount Displays)	64	59	16	201	400	550	680	800
Others	0	7	17	45	100	200	350	500
Domestic Market Total	457	1,194	2,092	3,585	5,080	7,100	9,400	11,600

Unit: 1,000 Uni

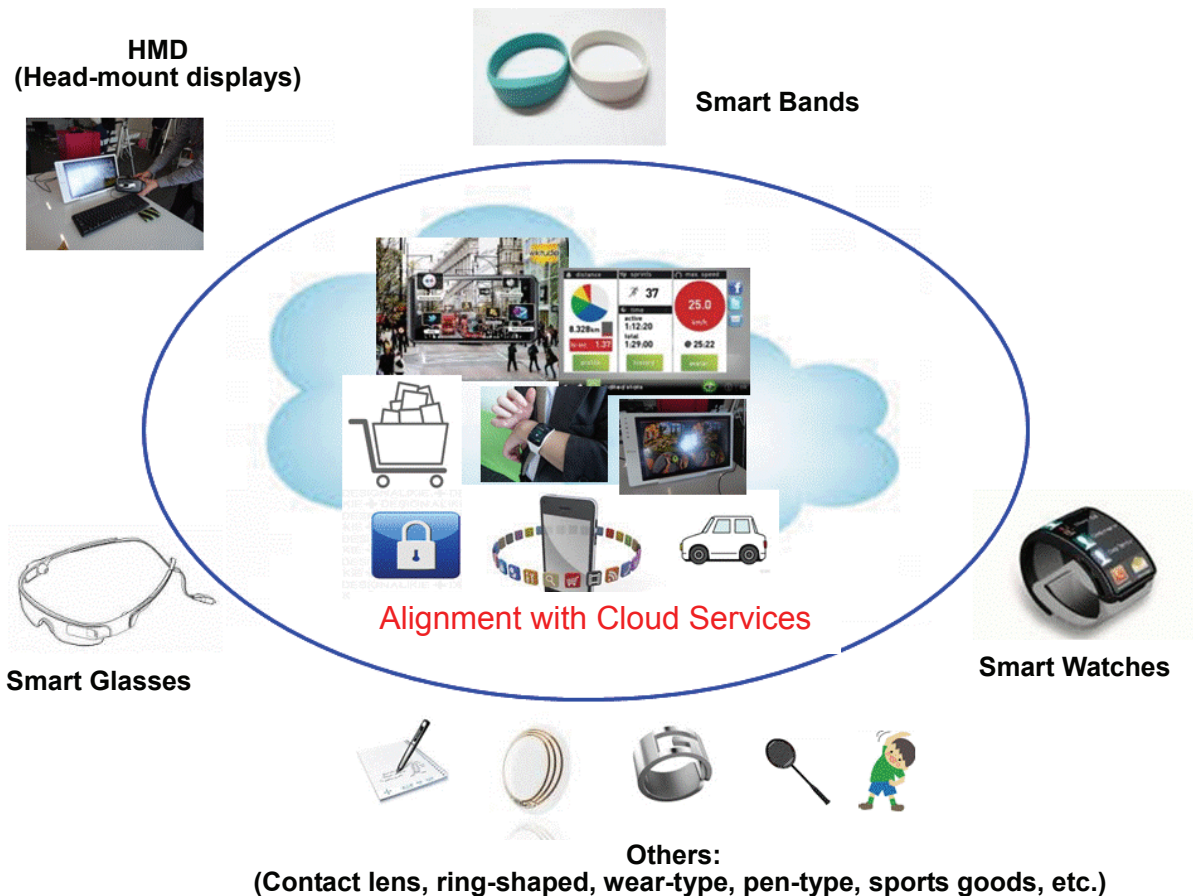
Estimated by Yano Research Institute

Notes:

2. The market size is based on the shipment volume of manufacturers.

■ Table 3: Major Types of Wearable Devices

Product Category	Details
Smart Watches	A general term of watch-shaped small computer terminals. There are two types: One works by connecting to smartphones and another by standalone through embedded communication module that can be connected to the internet.
Smart Bands	Pedometers, activity trackers, and sleep meters which collect and log vital data through the sensors installed and align with the internet and cloud services where data can be managed.
Smart Glasses	Glasses-shaped terminals that connect to the internet.
HMD (head-mount display)	HMD is a display device, worn on the head. Although initial development was for household devices to view image contents or gaming displays, it has recently been developed as smartphone peripheral products.
Others	Various types are developed, including those ring type ones, those embedded in contact lens, wear (clothing,) terminals, sports goods (i.e. rackets balls, and shoes, etc.,) pet collars, and pens.



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