



# Wearable devices expand beyond health and fitness



# Momentive study: wearable devices expand beyond health and fitness

n=3,056 U.S. Adults 18+

Data collected: September 2-6, 2022

MOE: +/- 2.5pp @95% CL

## Key findings

1

At-home fitness remains popular, while enthusiasm for gyms sees a decline through the pandemic.

2

Nearly one in three U.S. adults use a wearable device to manage or monitor their health, with the majority owning a smartwatch.

3

Not just for fitness: Gen Z and Millennials pivot to smartwatches as wearables become communication and fashion devices.

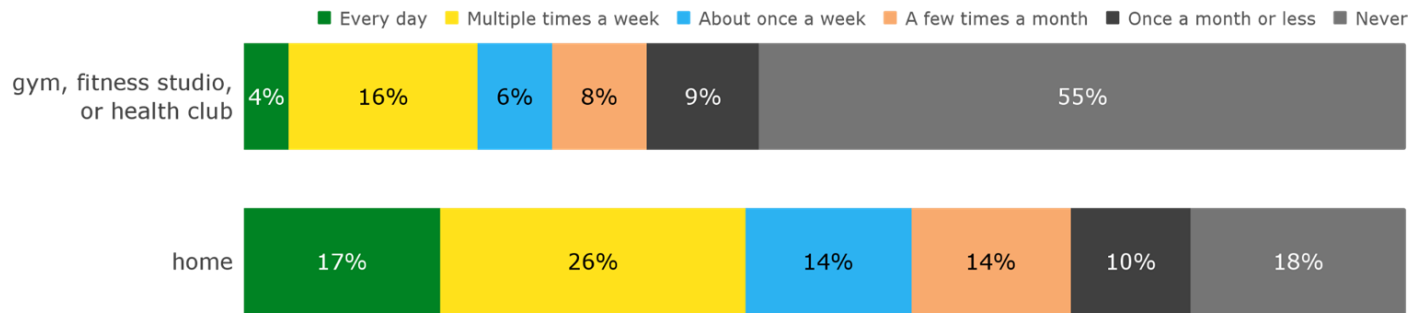
4

Only 4 in 10 wearable device owners have a great deal of trust that the data they are getting from their wearable devices is reliable.

# At-home fitness remains popular, even among gym-goers; more than half of all U.S. adults exercise at home at least weekly

*How often do you exercise at...*

**NET  
at least weekly**



**26%**

**57%**



**72% of weekly gym goers also exercise at home on a weekly or daily basis**

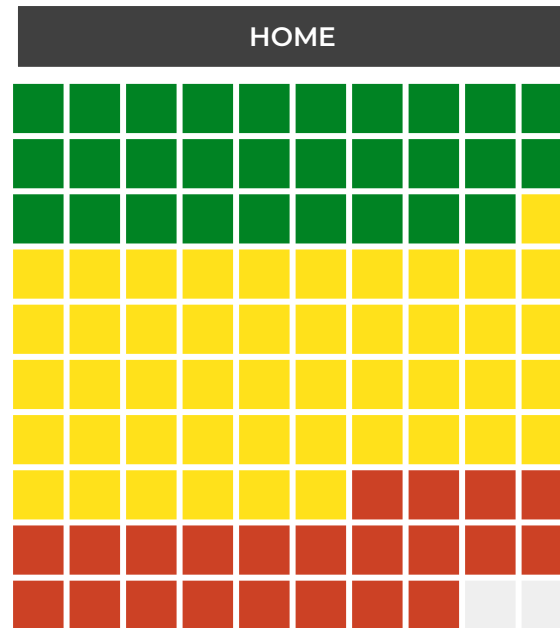
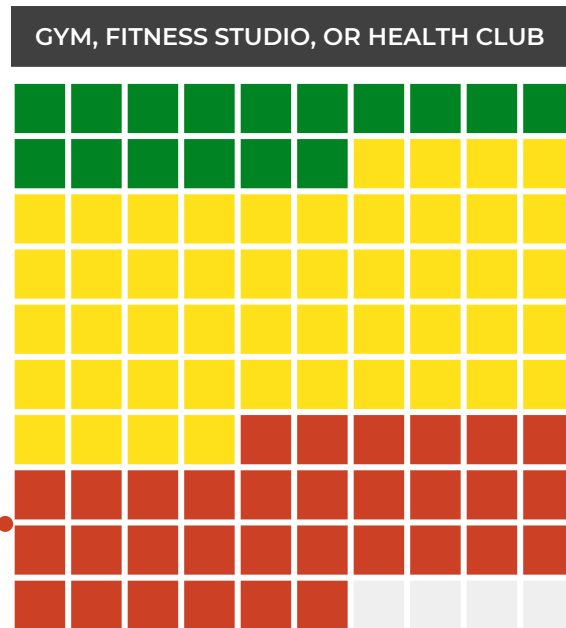


**Only 1 in 3 (33%) U.S. adults who exercise at home at least weekly also go to the gym on a weekly or daily basis**

# Gyms see greater attrition than home fitness

*Compared to one year ago, would you say you're exercising at ... more often, less often, or about the same amount?*

- More often
- About the same amount
- Less often



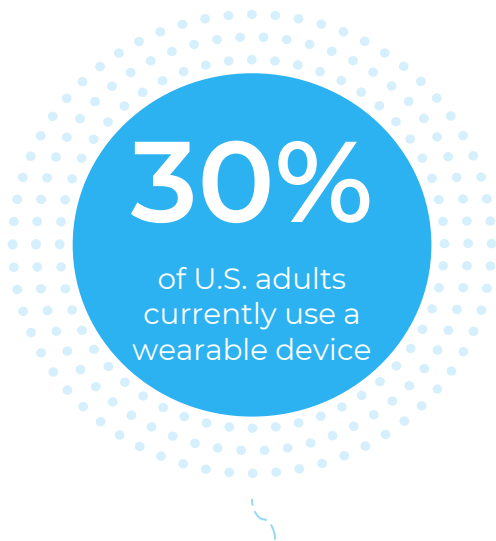
Nearly 1 in 3 (31%) Americans say they are **going to the gym less often now than compared to a year ago**, nearly 1.5 times the amount of those who say they are exercising less at home.

N = 3,056, September 2-6, 2022; U.S. Adults 18+

Q: Compared to one year ago, would you say you're exercising at home more often, less often, or about the same amount?

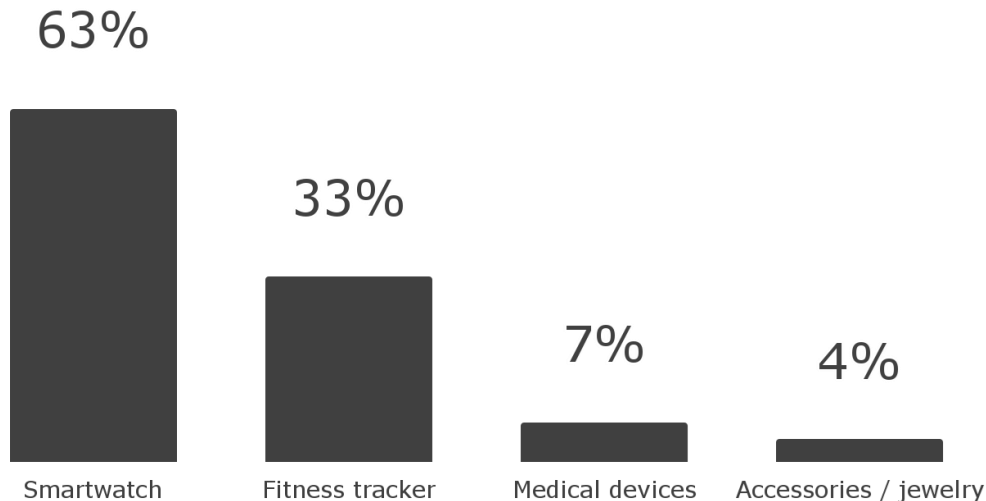
Q: Compared to one year ago, would you say you're exercising at a gym, fitness studio, or health club more often, less often, or about the same amount?

# Nearly one in three U.S. adults use a wearable device to manage or monitor their health, with the majority owning a smartwatch



Gym-goers are more likely to own a wearable device than those who work out at home (41% vs. 35%)

Which of the following types of wearable devices do you currently use?



N = 3,056, September 2-6, 2022; U.S. Adults 18+

Q: Do you use any wearable devices to monitor or manage your health?

Q: Which of the following types of wearable devices do you currently use? (Select all that apply)

# One in four (24%) of Americans plan on purchasing a wearable device in the next 6 months, primarily for health purposes

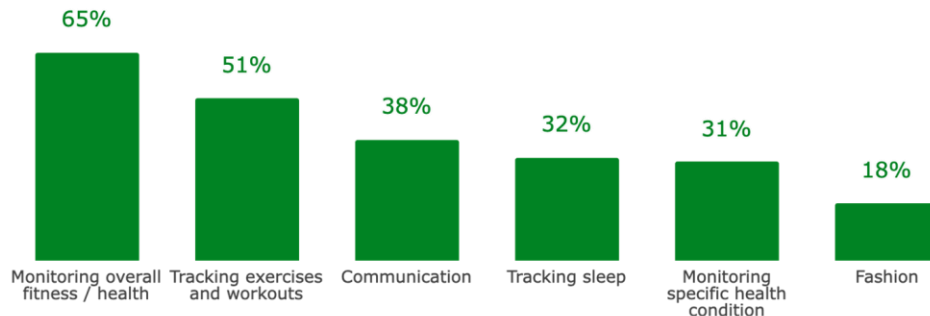
# 24%

of Americans plan  
on purchasing a  
wearable device in  
the next 6 months

*Which of the following types of wearable devices are you most likely to purchase?*

Smartwatch	66%
Fitness tracker	45%
Accessories / jewelry	24%
Medical devices	12%

*What are your main reasons for considering purchasing a wearable device?*



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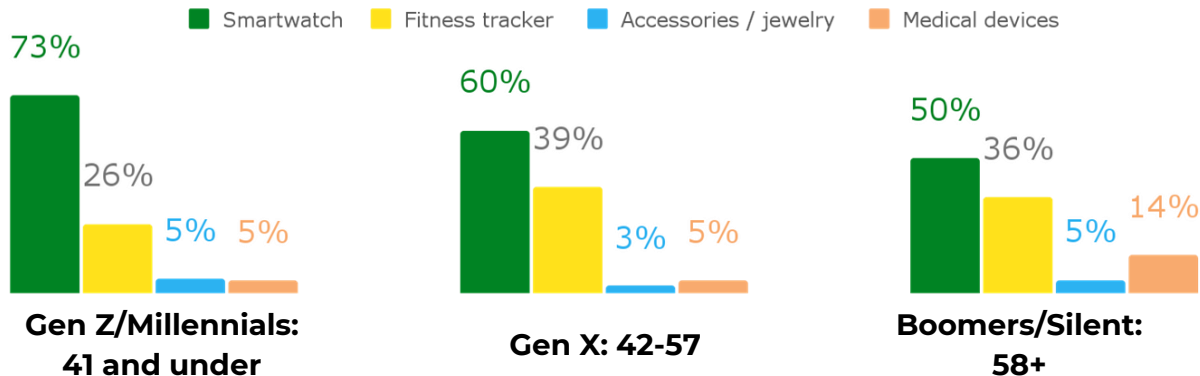
Q: How likely are you to purchase a wearable device in the next 6 months?

Q: Which of the following types of wearable devices are you most likely to purchase? (Select all that apply)

Q: What are your main reasons for considering purchasing a wearable device? (Select all that apply)

# Not just for fitness: Gen Z and Millennials pivot to smartwatches as wearables become communication and fashion devices

Which of the following types of wearable devices do you currently use?



What do you use your wearable device for?

	Gen Z/Millennials: 41 and under	Gen X: 42-57	Boomers/Silents: 58+
Monitoring overall fitness / health	67%	66%	50%
Tracking exercises and workouts	57%	64%	53%
Communication	50%	43%	28%
Tracking sleep	28%	35%	30%
Monitoring specific health condition	19%	20%	23%
Fashion	21%	9%	4%

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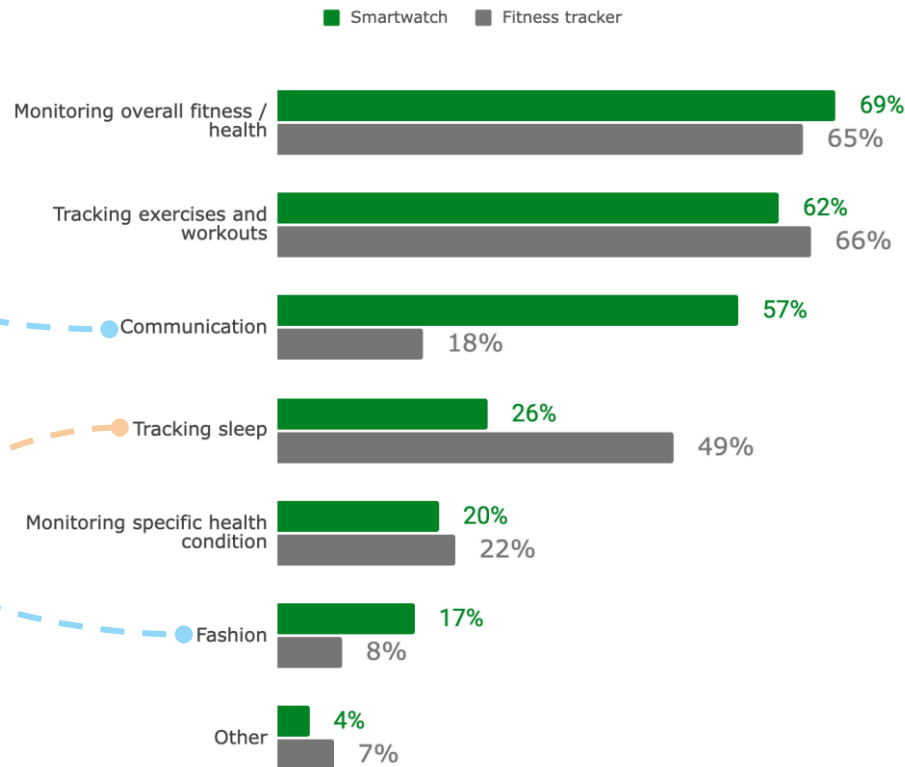
Q: Do you use any wearable devices to monitor or manage your health?

Q: Which of the following types of wearable devices do you currently use? (Select all that apply)

Note: 'Other' response option excluded from chart

Smartwatch owners show greater usage of their device for communication and fashion purposes, while those who own fitness trackers are more likely use their devices for tracking sleep

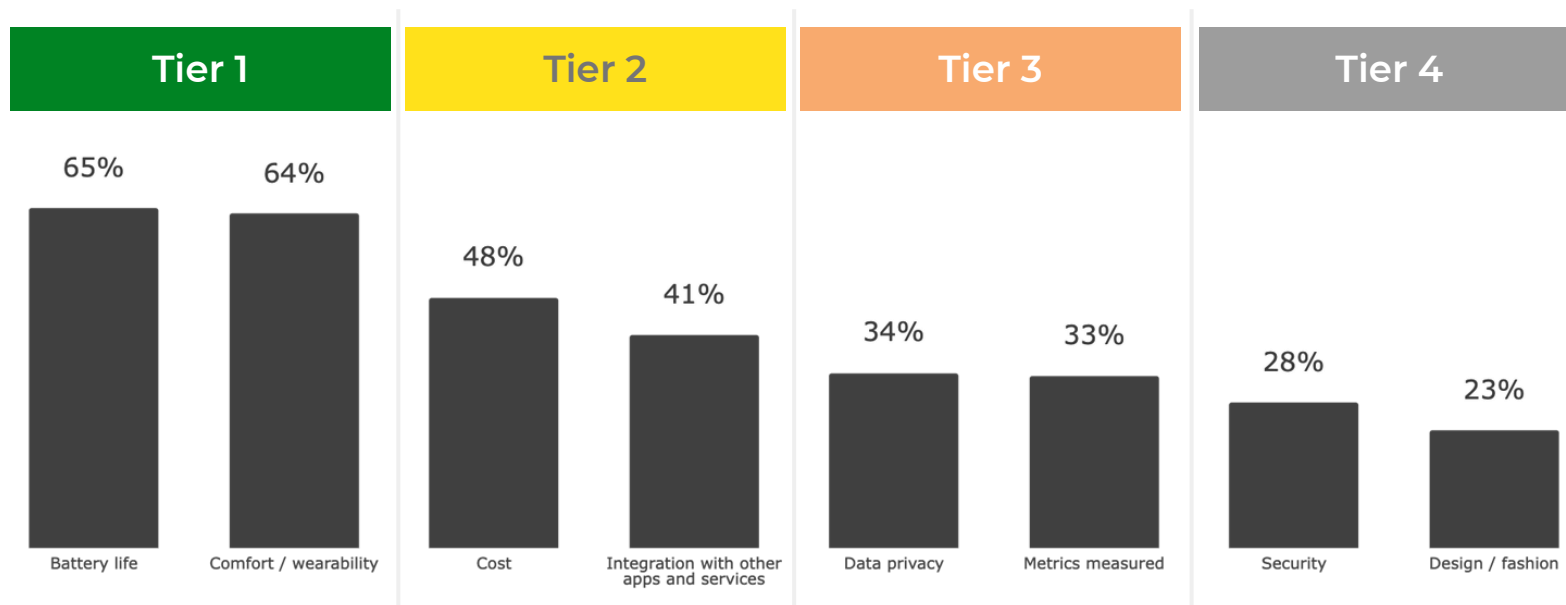
What do you use your wearable device for?





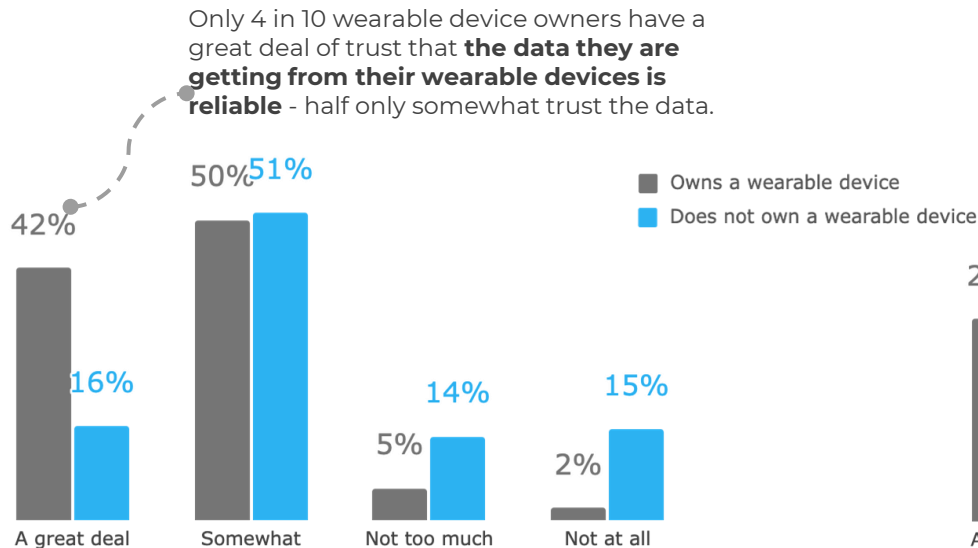
# Comfort and battery life are most important in a wearable device, while privacy and security are lower priorities for owners

*What is most important to you in a wearable device?*  
(among owners of wearable devices)

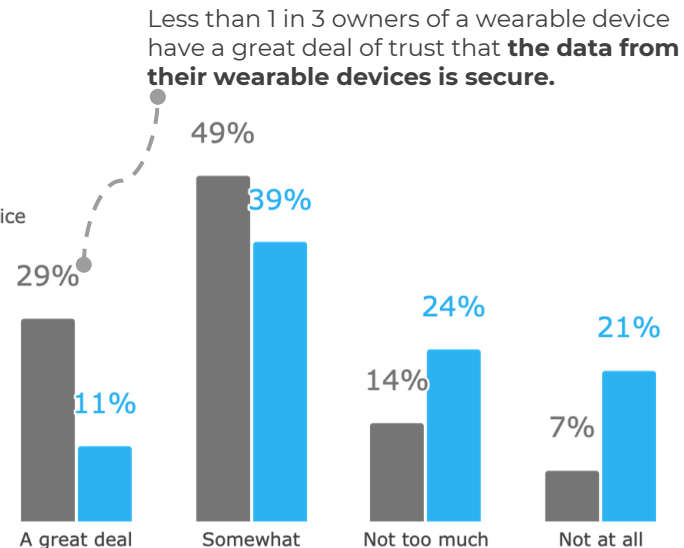


# Only 4 in 10 wearable device owners have a great deal of trust that the data they are getting from their wearable devices is reliable

How much do you trust that the data from wearable devices is **reliable**?



How much do you trust that the data from wearable devices is **secure**?



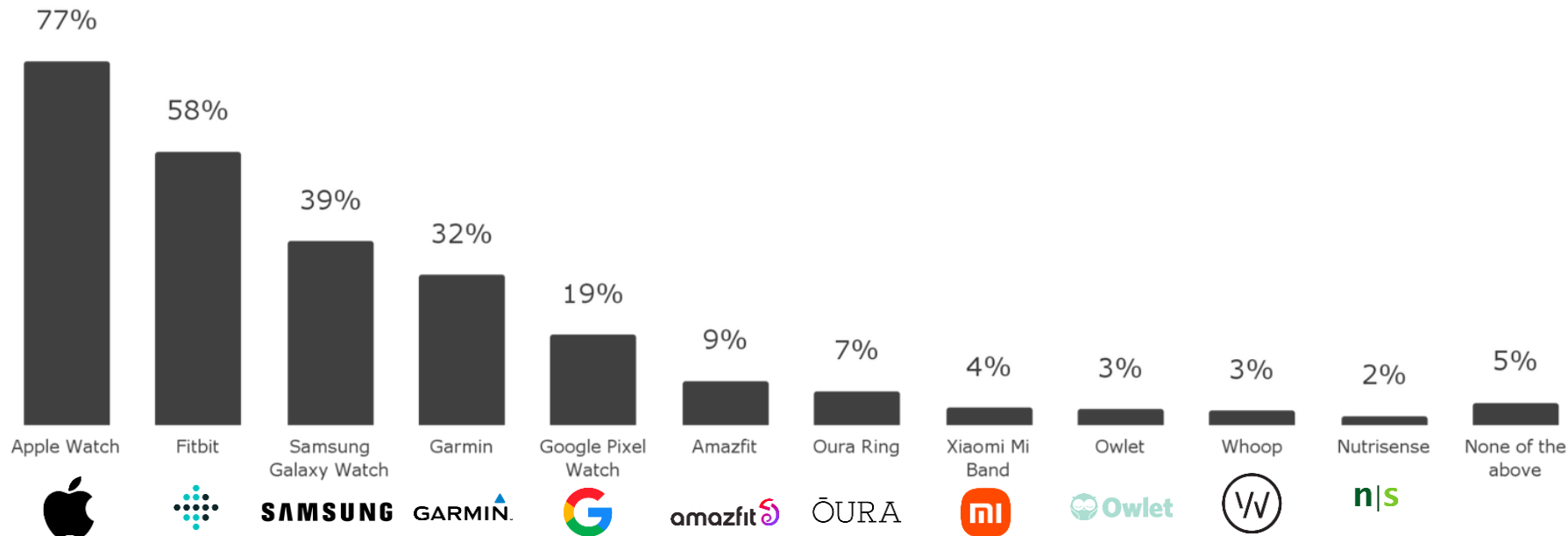
N = 3,056, September 2-6, 2022; U.S. Adults 18+

Q: How much do you trust that the data from wearable devices is reliable?

Q: How much do you trust that the data from wearable devices is secure?

# Apple is the runaway leader in wearable device brand recognition, followed by Fitbit, Samsung, and Garmin

*Which of the following wearable devices brands have you ever heard of?*  
(among very/somewhat likely to purchase a wearable device in next 6 months)



# Oura Ring and Garmin sees greater brand recognition among white Americans and higher income consumers

*Which of the following wearable devices brands have you ever heard of?*

	Apple Watch	Fitbit	Samsung Galaxy Watch	Garmin	Google Pixel Watch	Oura Ring	Amazfit	Owlet	Whoop	Xiaomi Mi Band	Nutrisense
<b>Below \$50,000</b>	67%	53%	35%	19%	19%	5%	7%	2%	2%	2%	2%
<b>\$50,000 - \$99,999</b>	74%	69%	39%	32%	17%	5%	5%	3%	2%	2%	1%
<b>\$100,000 and above</b>	77%	73%	34%	40%	15%	11%	5%	4%	4%	1%	0%
<b>White</b>	73%	71%	36%	34%	18%	8%	6%	4%	3%	2%	1%
<b>Hispanic</b>	70%	51%	32%	20%	14%	4%	5%	2%	2%	2%	2%
<b>Black</b>	64%	46%	33%	14%	16%	3%	8%	2%	1%	1%	1%
<b>Asian</b>	65%	44%	29%	19%	14%	5%	5%	0%	0%	5%	0%
<b>Other</b>	65%	57%	45%	25%	20%	4%	9%	2%	4%	5%	3%

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Q: Which of the following wearable devices brands have you ever heard of? (Select all that apply)

# Garmin's brand awareness skews old, with recognition twice as high among Millennials or older, compared to Gen Zers

*Which of the following wearable devices brands have you ever heard of?*

	Apple Watch	Fitbit	Samsung Galaxy Watch	Garmin	Google Pixel Watch	Oura Ring	Amazfit	Owlet	Whoop	Xiaomi Mi Band	Nutrisense
<b>Gen Z: 25 and under</b>	81%	57%	36%	14%	25%	7%	7%	2%	2%	2%	1%
<b>Millennials: 26-41</b>	69%	58%	40%	30%	18%	6%	9%	5%	4%	3%	2%
<b>Gen X: 42-57</b>	72%	67%	38%	31%	16%	8%	6%	3%	3%	2%	2%
<b>Boomers / Silent: 58+</b>	67%	65%	26%	30%	13%	5%	3%	1%	1%	1%	1%
<b>Male</b>	69%	62%	37%	32%	18%	7%	7%	1%	3%	3%	1%
<b>Female</b>	73%	64%	33%	25%	15%	6%	5%	4%	1%	1%	1%

N = 3,056, September 2-6, 2022; U.S. Adults 18+

Q: Which of the following wearable devices brands have you ever heard of? (Select all that apply)

