



Smartwatch users

Six country market overview

Prof. Dr. Anna Schneider

Hochschule Fresenius University of Applied Sciences, Cologne (Germany)

Dr. René Arnold

Huawei, Shenzhen (China)

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Picture Taan Huyn from unsplash

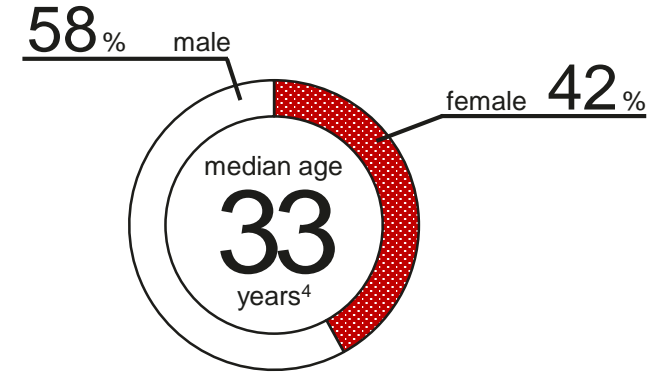
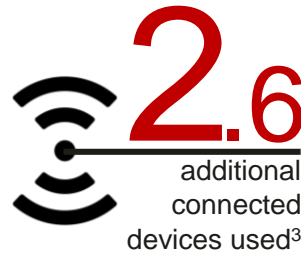


China



x1.5

increase in exercise¹



■ general and exercise tracking⁶ ■ general or exercise tracking⁶ □ no tracking⁶

Legend: Smartwatch users represent the respondents stating to have used a smartwatch during the four weeks prior to the survey. 1 Smartwatch users compared non-users. 2 Including respondents who track no metrics at all. 3 Referring to other sports-focused connected devices selected from a list of 19 devices. 4 The sample in China was representative of the online population in China, consequently a younger median age can be expected. 5 Referring to at least moderate exercise; definitions used in the questionnaire: mild exercise (e.g., stretching, casual walking, fishing, golf using cart), moderate exercise (e.g., yoga, hiking, jumping on a trampoline), strenuous exercise (e.g., martial arts, competitive soccer, football, hockey, high impact aerobics). 6 Share of respondents in percent; "no tracking" refers to respondents who do not actively track at least one metric pertaining to their physical activity or body functions monitoring. N (China total) = 3,007; n (smartwatch users) = 836.

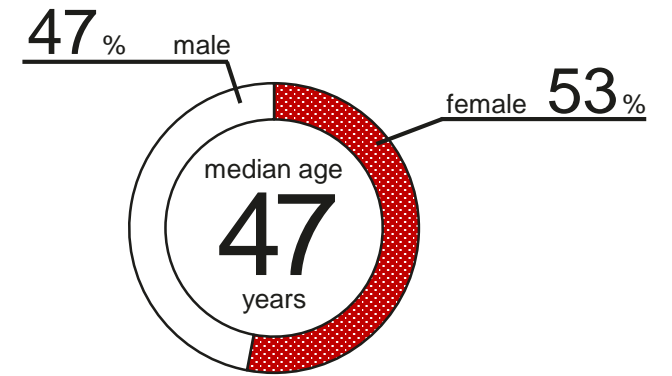
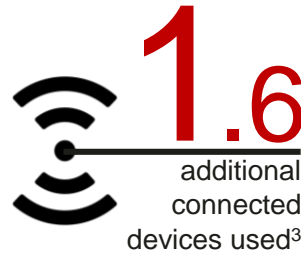
Icons: Danishicon, Flatart, Tom Fricker, and Supalerk Laipa from the Noun Project.

France



x1.3

increase in exercise¹



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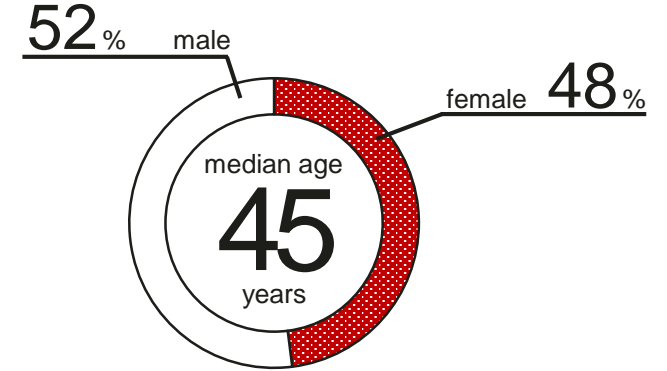
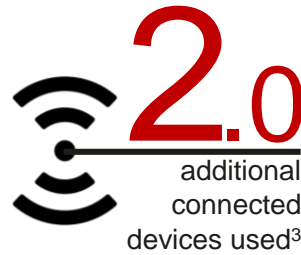
Icons: Danishicon, Flatart, Tom Fricker, and Supalerk Laipa from the Noun Project.

Germany



x1.4

increase in exercise¹



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Icons: Danishicon, Flatart, Tom Fricker, and Supalerk Laipa from the Noun Project.

Italy



x1.4

increase in exercise¹



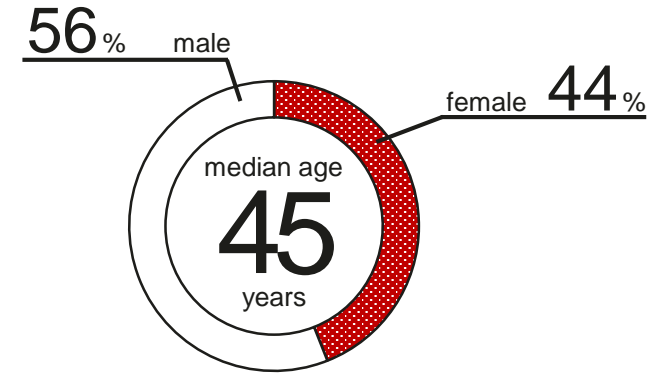
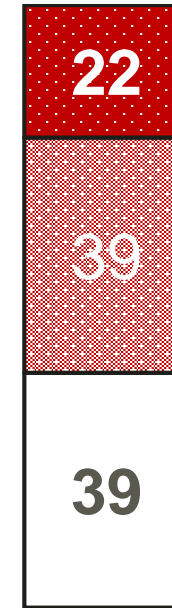
3.4

metrics tracked²



1.8

additional
connected
devices used³



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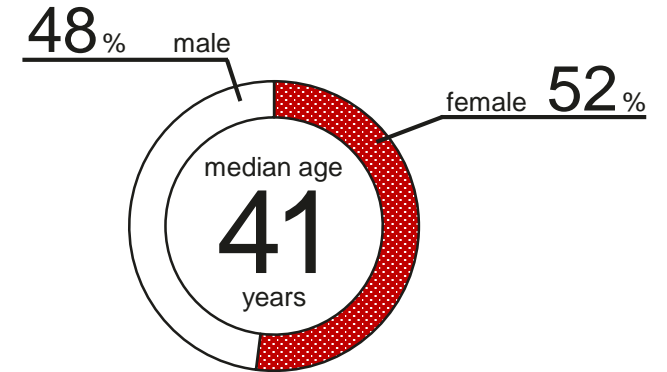
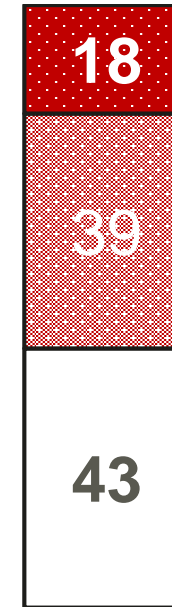
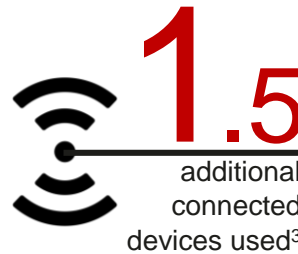
Icons: Danishicon, Flatart, Tom Fricker, and Supalerk Laipa from the Noun Project.

United Kingdom



x1.4

increase in exercise¹



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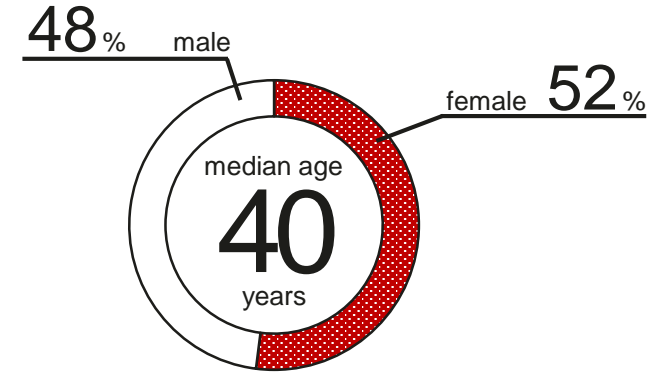
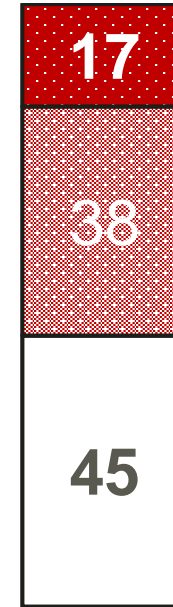
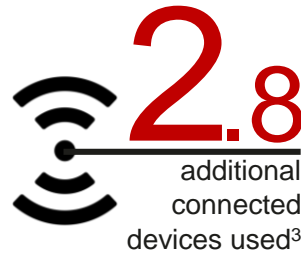
Icons: Danishicon, Flatart, Tom Fricker, and Supalerk Laipa from the Noun Project.

United States



x1.5

increase in exercise¹



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Icons: Danishicon, Flatart, Tom Fricker, and Supalerk Laipa from the Noun Project.

Methodology

Method:	CAWI: Computer Assisted Web Interview
Sample size(s):	n=18,358 (Germany n=3,073; Italy n=3,065; France n=3,078; China n=3,007; UK n=3,052; US n=3,083)
Sampling time:	2022/04/26 to 2022/05/09
Length of interview:	The median length of interview varied between 21 and 24 minutes depending on the country.
Sampling frame:	The sample type is a non-probability sample recruited and stratified on basis of representative quota distributions (quota sample).
Sampling procedure:	Using YouGov's proprietary sampling technology, quotas are framed based upon the census or profile of the required population in the beginning. This frame is the basis on which the sampling software controls the flow of members into each survey. The sampling software randomly selects from the available panel, and allocates to surveys according to the quotas set. YouGov's sampling software includes a router. This removes the potential for self-selection on surveys, and increases the ability to deliver lower incidence samples within a short time frame. Panelists receive an invitation email containing a survey link. When they access the link the router checks against quotas on all live surveys and allocates them to a survey for which they qualify. Thus, panelists are not invited to a specific single survey, reducing the risk of early response bias, social desirability or other motivational biases.
Survey pretest:	For testing functionalities, the online survey was soft launched from 2022/04/25 to 2022/04/26. On the basis of the results, minor adjustments were implemented. Respondents from the soft launch were removed from the final sample.
Questionnaire:	Huawei in collaboration with Prof. Dr. Anna Schneider provided the master questionnaire in English. YouGov reviewed the questionnaire and translated it into the local languages required for the target countries.
Data preparation and analysis:	The survey data was processed by YouGov and provided in a SPSS data set. Incomplete cases were removed from the data set. Cases from the pretest as well as cases with duplicate cookie ids were removed. Analyses were done in R.

The authors

Prof. Dr. Anna Schneider

Hochschule Fresenius University of Applied Sciences

Since 2017, Anna Schneider is Professor of Business Psychology. Her research interests and teaching revolve around the impact of digitalization on consumer behavior, and in particular how people communicate and interact with emerging technology. Anna is a member of various research associations and sits on the scientific board of the Wissenschaftliches Institut für Infrastruktur und Kommunikationsdienste (WIK) – a renowned communications and internet policy think tank. Drawing on more than 20 years of hands-on experience in market research she regularly advises public and private organizations on surveys as well as qualitative research projects.

Dr. René Arnold

Huawei Technologies Ltd.

René Arnold is Vice President Public Affairs Strategy at Huawei Technologies. Previously, he worked at high-profile think tanks in Germany (German Economic Institute and WIK) and Brussels (Bruegel) where his research focused on digital economy, internet policy and impact assessments of regulatory frameworks. Over the past ten years, René has (co-)authored more than 100 conference papers, journal articles and white papers. He is a frequent speaker at both academic and industry events contributing among other fora to the ITU economic and industry round table, the Digital Summit of the German government and the research committee of the Munich Circle.

Thank you.

Bring digital to every person, home and organization for a fully connected, intelligent world.

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