



Earwear Tops Smartwatch Shipments in Europe in 1Q19, says IDC

London, June 25, 2019 — Shipments of wearable devices in Europe grew 118.5% year over year to 10 million units in the first quarter of 2019, according to data from International Data Corporation's (IDC) [Worldwide Quarterly Wearable Device Tracker](#). In 1Q19, earwear accounted for 40.1% of shipments in the region, followed by watches (36.6%) and wrist bands (22.9%).

Western Europe accounted for 82% of the European wearables market continued to have a higher mix of smartwatches than Central and Eastern Europe. However, Central and Eastern Europe registered a yearly smartwatch growth of 140%, showing that consumer appetite for higher functionality devices is growing, and consumers in the region are willing to spend more on a wearable device.

"Although earwear overtook smartwatches, both are complementary products towards a more connected consumer," said Francisco Almeida, senior research analyst for wearable devices at IDC. "These are two very different value propositions. By buying a smartwatch, a consumer is actively looking to use a specific set of features a wearable device offers. That might not always be the case with earwear devices, as consumers mostly buy them for the audio/convenience/design aspect, rather than for the extra features that make them wearables.

"Apple's entry into the earwear category in 2017 was a milestone for the wearables market, changing consumers' perception of wireless headphones, which led other companies to follow suit. That explains why AirPods and Beats account for more than 50% of the earwear category in Europe."

Earwear registered a stellar 298% yearly growth, driven primarily by Apple. Household names such as JBL, Jabra, Bose, and Sony continue to incorporate smart functionalities in their product lines. Companies with such brand recognition, channel presence, and product quality also help carry this category forward, as it's a simpler value proposition for customers than pitching a whole new category.

Watch shipments grew 41% in Europe from a year ago. Apple and Samsung kept their momentum and companies like Fitbit and Garmin continue to shift their portfolios towards higher functionality devices. The promise of hybrid connected watches from fashion brands has yet to materialize as it is a harder value proposition to sell and to understand for the average consumer.

Wrist Bands kept the growth momentum in 1Q19, mainly due to Xiaomi, Fitbit, and Huawei. Xiaomi continues to expand its European footprint, offering a low-cost/high value product that resonates with consumers. Fitbit debuted the Inspire product series, bringing more clarity to its portfolio with a compelling design and price point. In 1Q19, the wrist band category grew 149% compared to the prior year.

IDC expects the European wearables market to reach 45.6 million units in 2019, with watches taking the lion's share of the market (43%) followed by earwear (37%). Overall the market is expected to grow at a 9.3% CAGR until 2023.

Top 5 Wearable Devices Companies in Europe by Shipment Volume, Market Share, and Year-Over-Year Growth, 1Q19 (shipments in millions)

Company	1Q19 Shipments	1Q19 Share	1Q18 Shipments	1Q18 Share	Year-over-Year Growth
Apple	3.40	33.8%	1.73	37.7%	96.1%
Samsung	1.59	15.8%	0.45	9.7%	254.1%
Xiaomi	0.87	8.6%	0.09	1.9%	915.3%
Fitbit	0.83	8.3%	0.52	11.3%	59.1%
Garmin	0.64	6.4%	0.47	10.3%	35.5%
Others	2.73	27.1%	1.34	29.1%	103.7%
Total	10.06	100%	4.60	100%	118.5%

Source: IDC Worldwide Quarterly Wearable Device Tracker, June 2019

IDC's Quarterly Wearable Device Tracker provides worldwide market coverage and forecasts for the entire device space, covering more than 80 makers in the space in more than 40 countries — providing fast, essential, and comprehensive market information across the entire wearable device market.

For more information on IDC's EMEA Quarterly Wearable Device Tracker or other IDC research services, please contact Vice President Karine Paoli on +44 (0) 20 8987 7218 or at kpaoli@idc.com. Alternatively, contact your local IDC office or visit www.idc.com.

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