Unlocking Growth in Wearable Tech

Adoption, Expectations, and What's Next

NielsenIQ powered by GfK intelligence

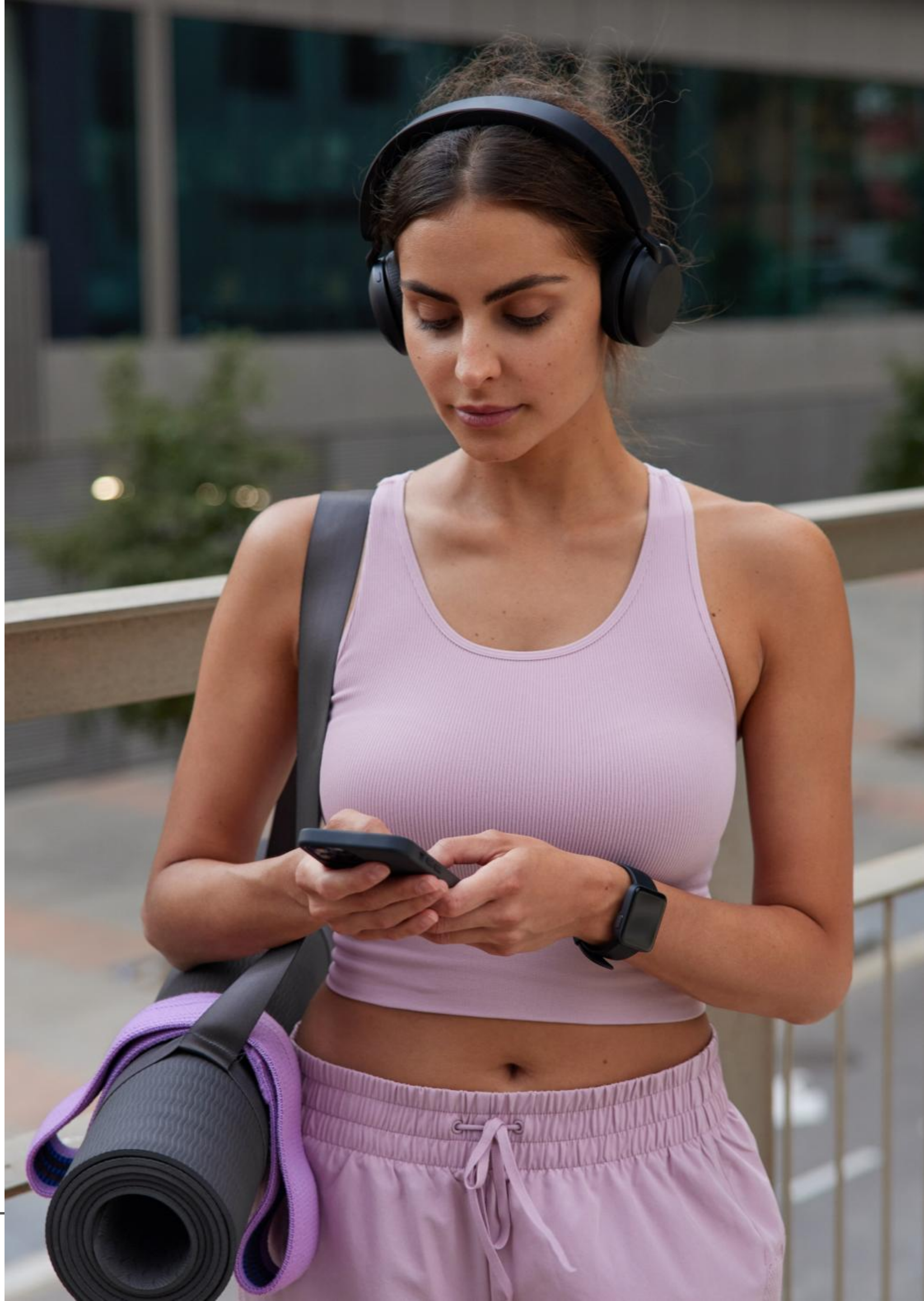
Wearable Tech in 2026

Wearable technology has moved firmly into the mainstream, with **nearly two-thirds of adults** either already using a device or planning to adopt one in the next year.

This report explores who today's wearable users and intenders are, what they value, and where the next wave of growth is likely to come from—across devices, features, brands, and retail channels.

Inside, we will cover:

- Market Size and Adoption
- Today's Wearables Consumer
- Brands that are Breaking Through
- The Smart Glasses Revolution
- An Outlook on Wearable Tech



Wearables Market Size & Adoption

Across wearable device categories, smartwatches are by far the top-owned wearable device, followed by fitness bands/activity trackers, and smart earbuds/headphones.

65%
of adults own a wearable tech solution.

53%
of current owners skew female. Intenders skew male (56%) and 55+ (47%).

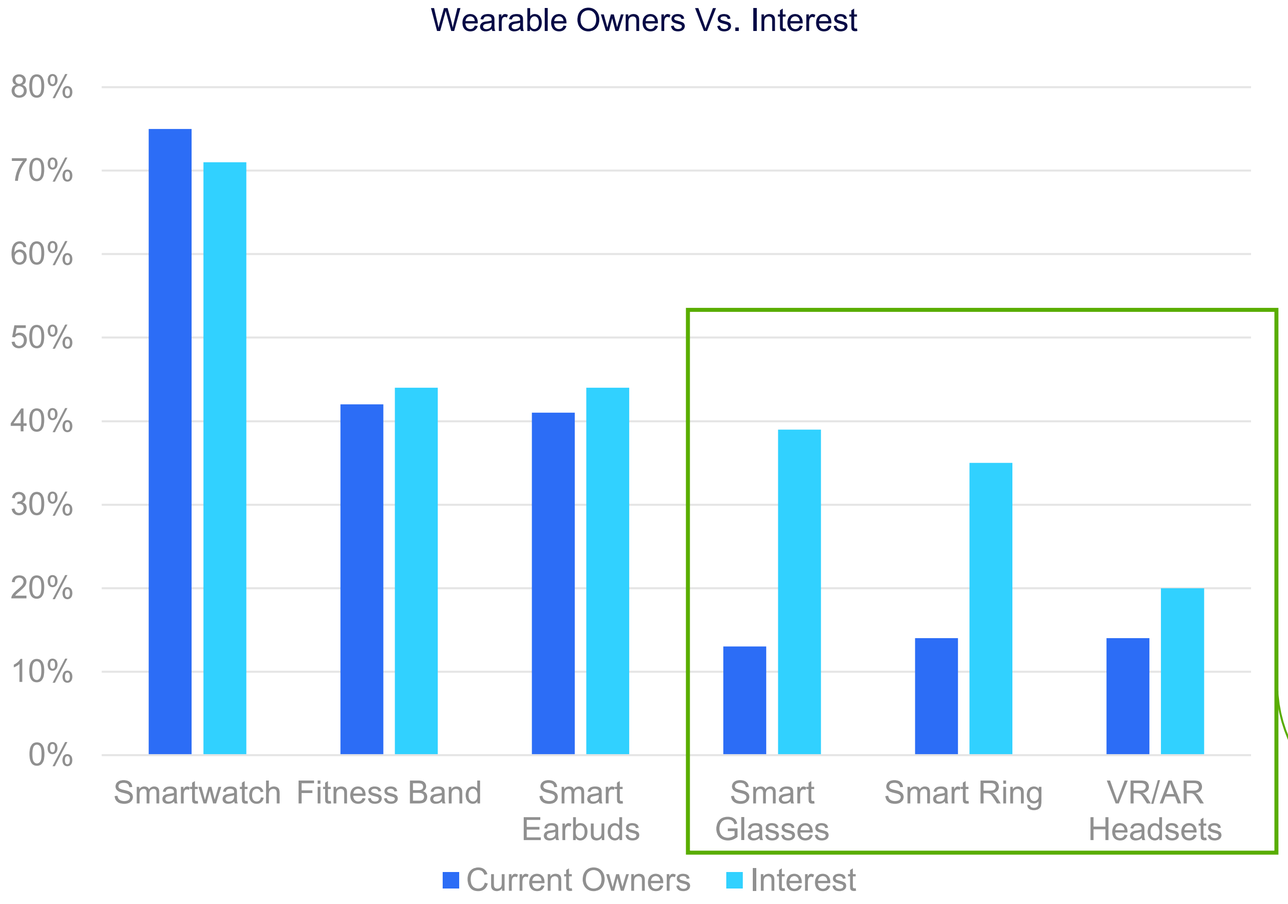
75%
Smart watches dominate ownership at 75%.

42%
Fitness trackers follow at 42% and smart earbuds (41%).

Source: NielsenIQ BASES Wearables 2026 Study

Opportunity for Growth in Smart Glasses and Rings

Ownership is still relatively low for smart rings (at 14%) and smart glasses (at 13%), but interest in these devices indicates a significant growth potential.

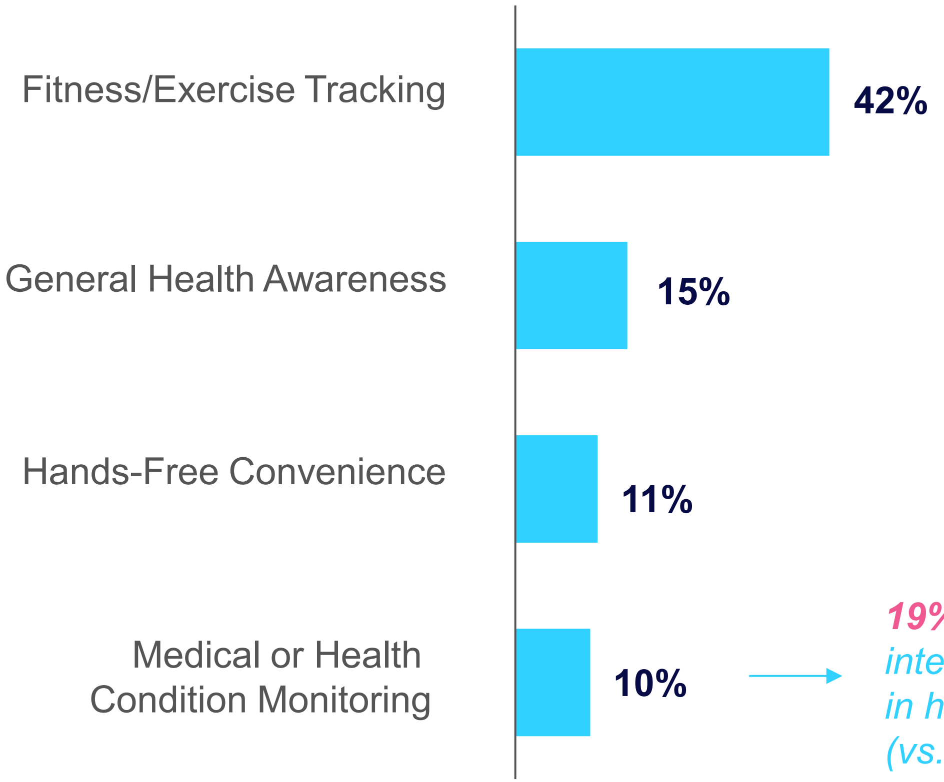


Intention gap vs. ownership indicates a significant growth potential for smart glasses and rings.

Features Attracting Shoppers

Wearable Owners & Intenders see fitness/exercise tracking as the most important benefit of wearable devices, outpacing all other features

Device Ownership Features Interest

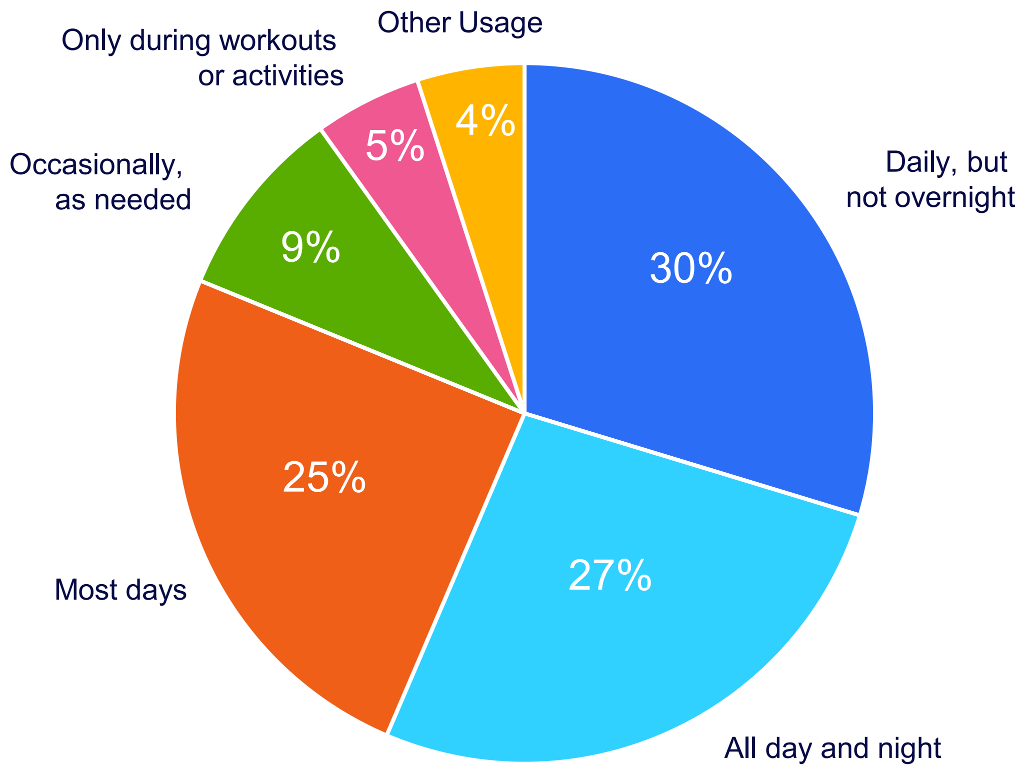


19% of wearable intenders are interested in health monitoring (vs. 7% of current users).

Source: NielsenIQ BASES Wearables 2026 Study

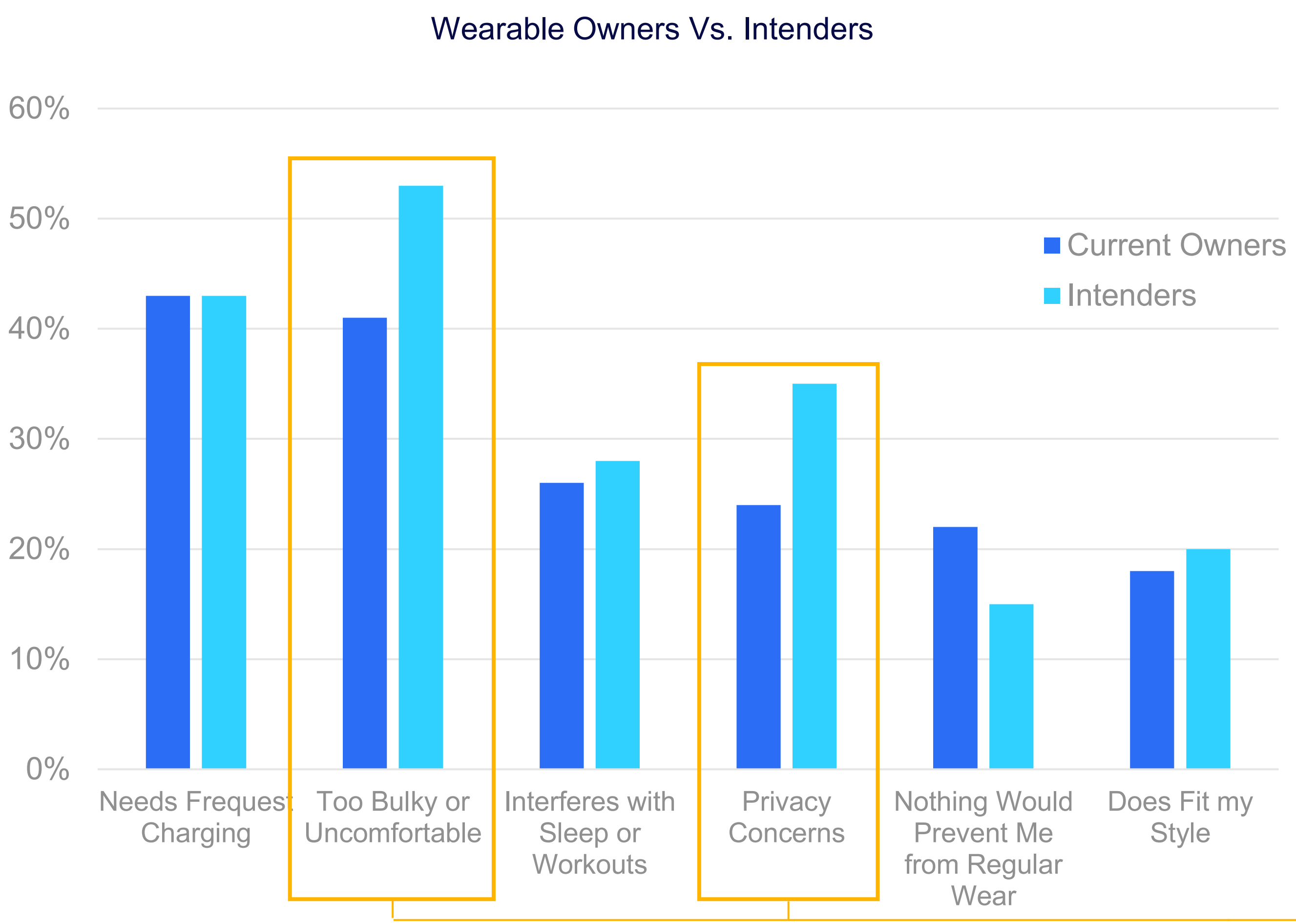
Wearables Wear Time

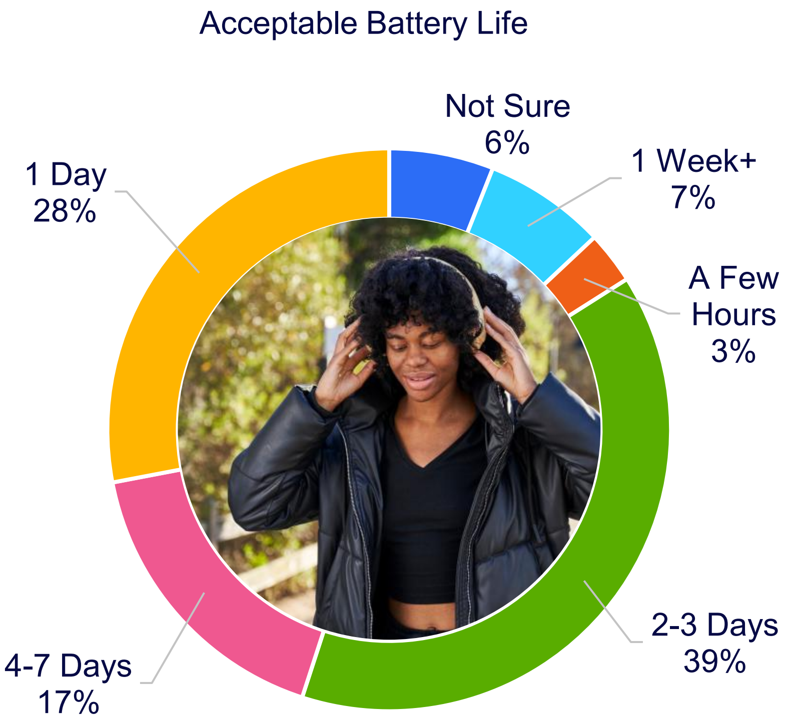
Wearable Owners & Intenders expect to/already wear their device most of the time, most commonly wearing daily but not overnight



Barriers to wearables usage

Overall comfort/bulk and privacy concerns are the top barriers to wearable adoption with intenders. One to three days is optimal for battery life.



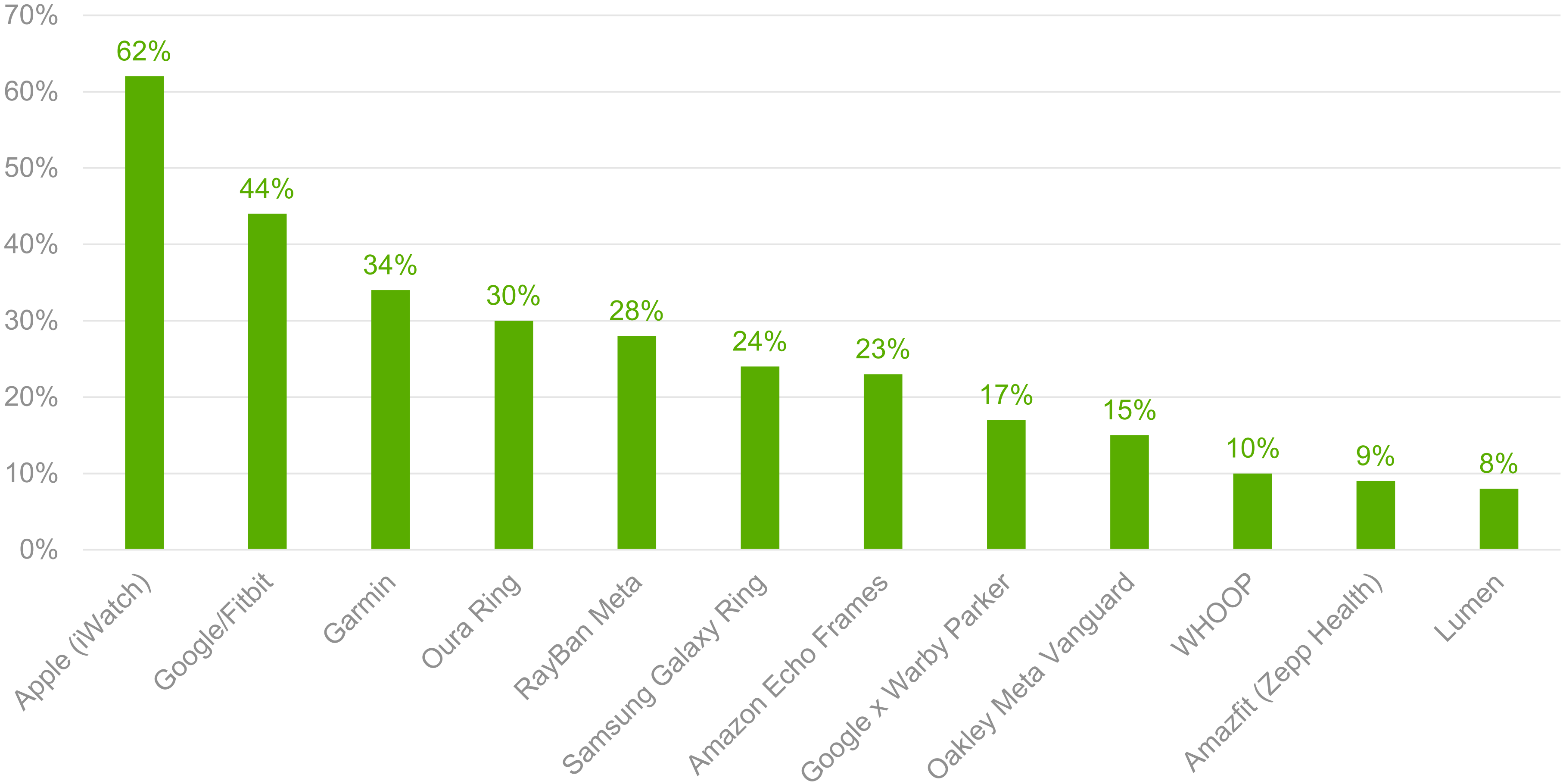


*Being **too bulky/uncomfortable** and **privacy concerns** highlight the largest barrier gaps between current users and intenders.*

Wearable Brands Leading on Expected Purchasing

Apple leads as the top wearable device brand that Owners & Intenders would consider purchasing (62%), followed by Google and Garmin.

Which brands would you consider purchase a wearable device from?



Watch out for Gen Z

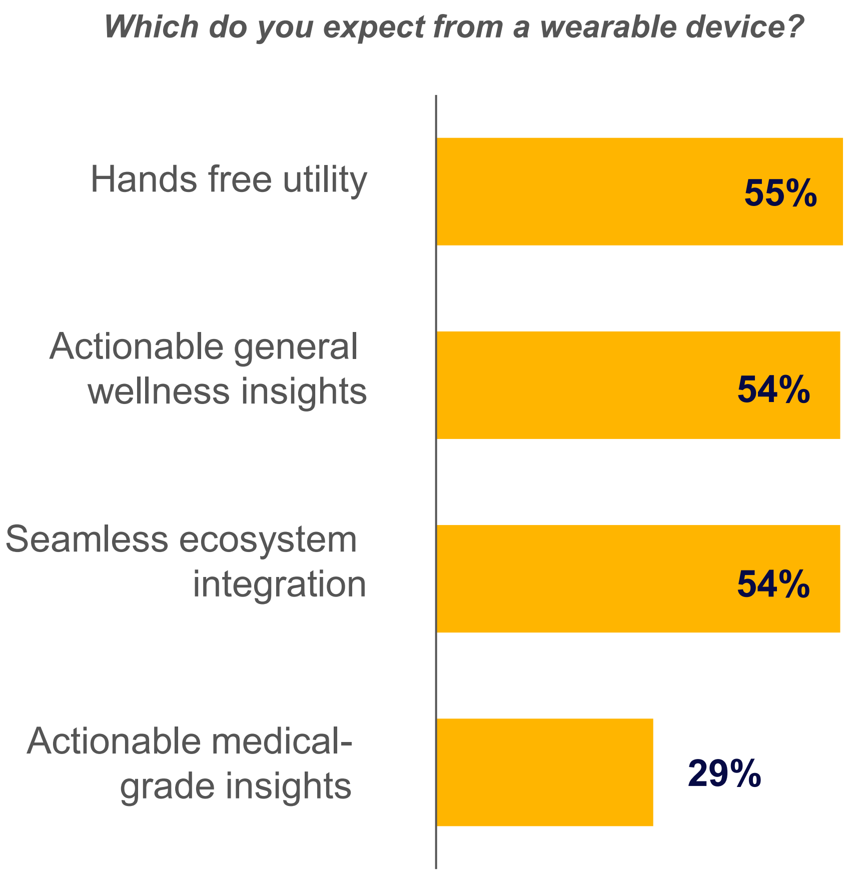
Gen Z has the most interest (**75%**) in purchasing the Apple (iWatch), 13 points higher than the average intender!

Rings for Millennials

Millennials have the highest purchase intent for Oura Ring, at 39%, 9 points higher than the average intender!

Consumer Expectations

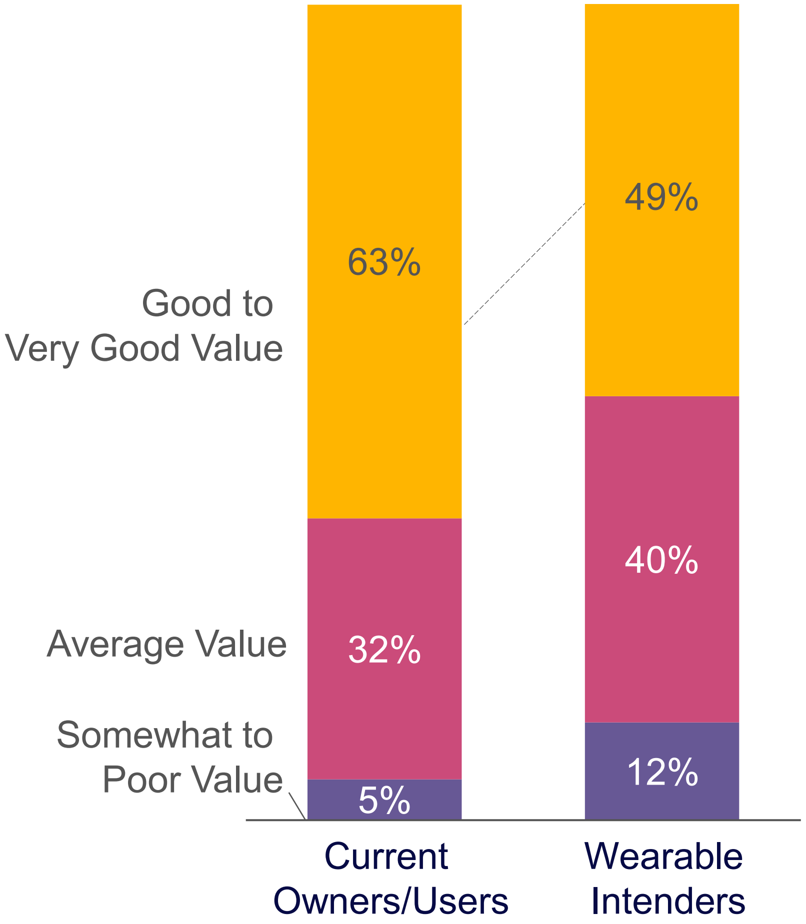
Wearable Owners & Intenders expect hands-free utility, actionable general wellness insights, and seamless ecosystem integration from a device.



***66%** of Gen Z expect seamless ecosystem integration, 12 pts higher than the average owner or intender. This includes integration with phones, apps, gyms and health platforms.*

How do consumers perceive the value of wearable devices?

Current owners/users have higher value perceptions than intenders, indicating an opportunity to education the consumer on the benefits of wearables.

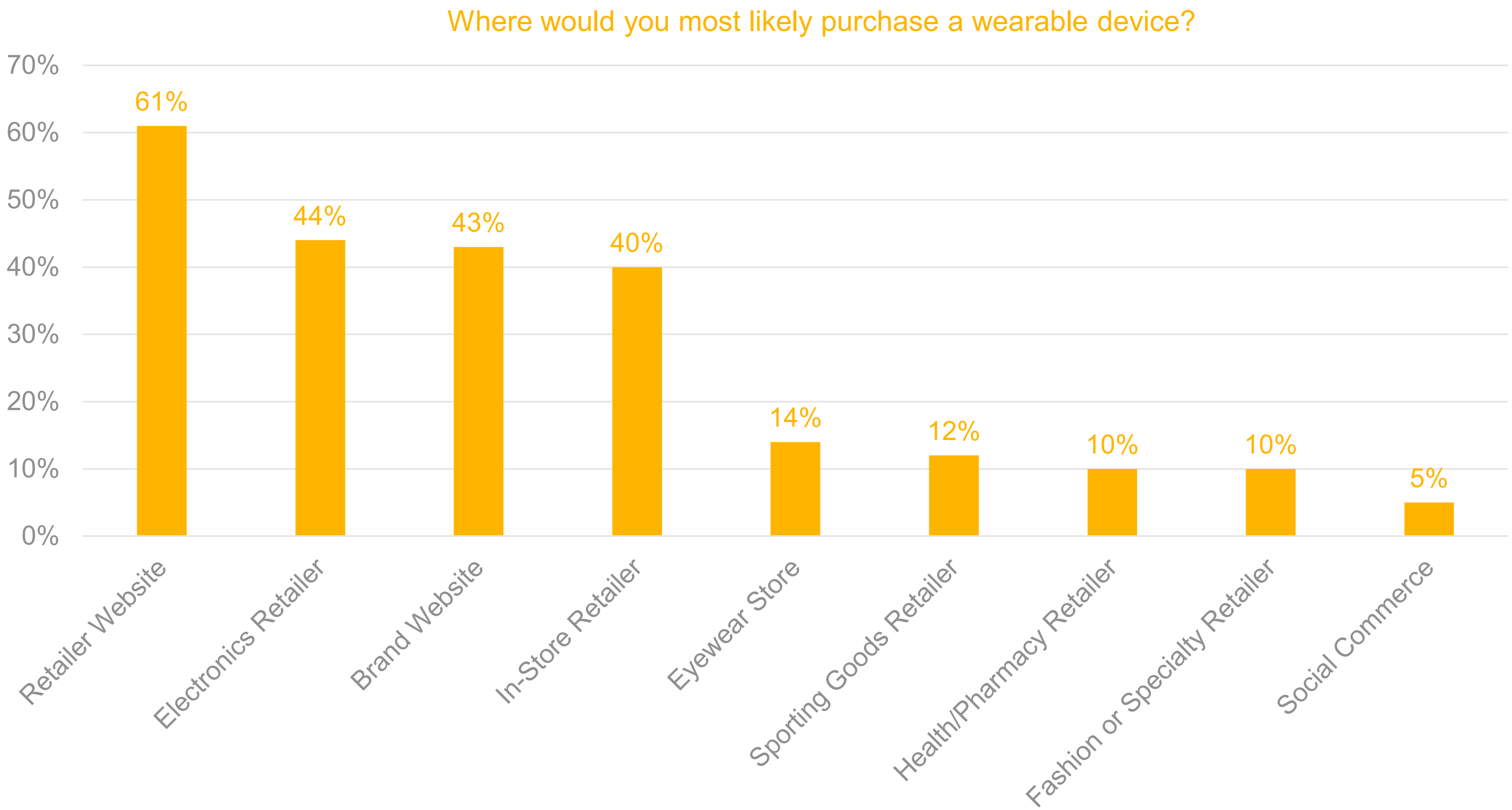


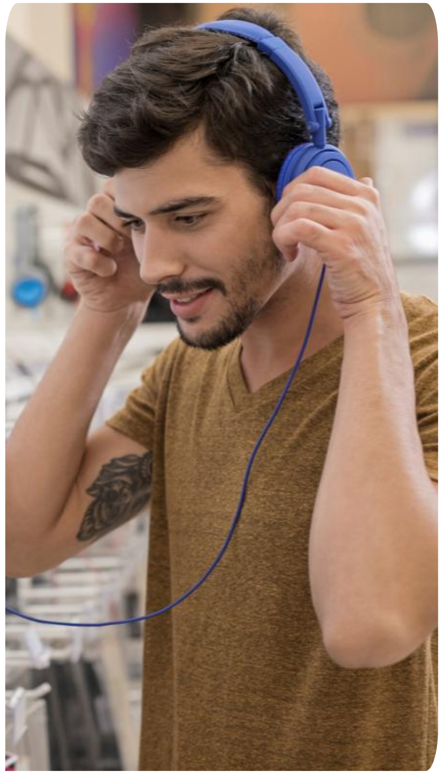
14pts
Current users have higher value perception over intenders.

Millennials See Value
Perception of "Very High Value" is 5 points high than average owner/user.

Wearables Expected Purchasing Channel

Retailer websites are the channel that Owners & Intenders would most likely use to purchase a wearable device. Electronic retailers, brand websites, and in-store retailers are also meaningful channels for purchasing.





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Influences on Retailer of Choice

While competitive pricing and promotion yields the greatest influence on choosing a retailer, trust and in-store experience can heavily sway many consumers.

Millennial Advice
36% value expert advice from their retailer of choice.

Targeting Gen Z?
44% in this cohort value fast delivery in their retailer of choice!

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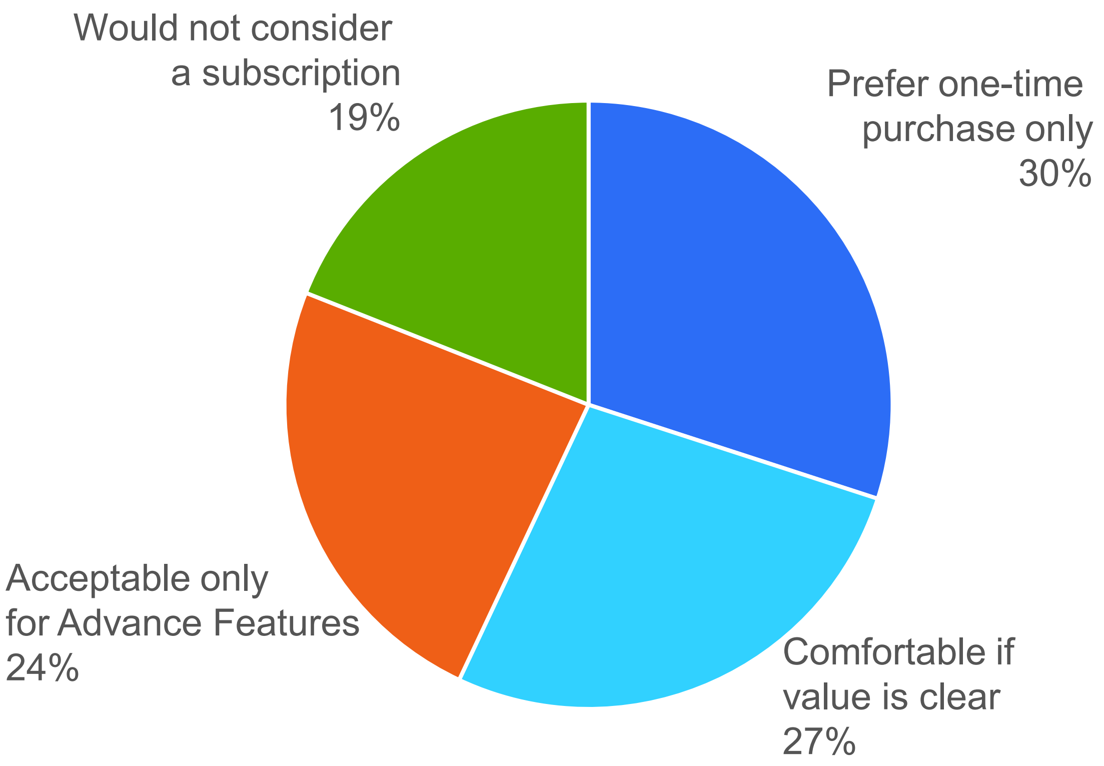
Wearables Subscription Adoption

How do you feel about paying for insights in a monthly subscription or data plan?



Source: NielsenIQ BASES Wearables 2026 Study


A Spotlight on the
Smart Glasses Revolution
NIQ

Smart glasses stand out as a category with aspirational appeal but still evolving clarity.

Consumers interested in smart glasses view them as tools for organization, entertainment, and immersive experiences rather than replacements for phones or traditional screens.

Theater-like viewing, enhanced sports experiences, and frictionless content capture point toward experiential value over novelty. Notably, prescription compatibility emerges as a critical adoption trigger, underscoring that practicality must match innovation.

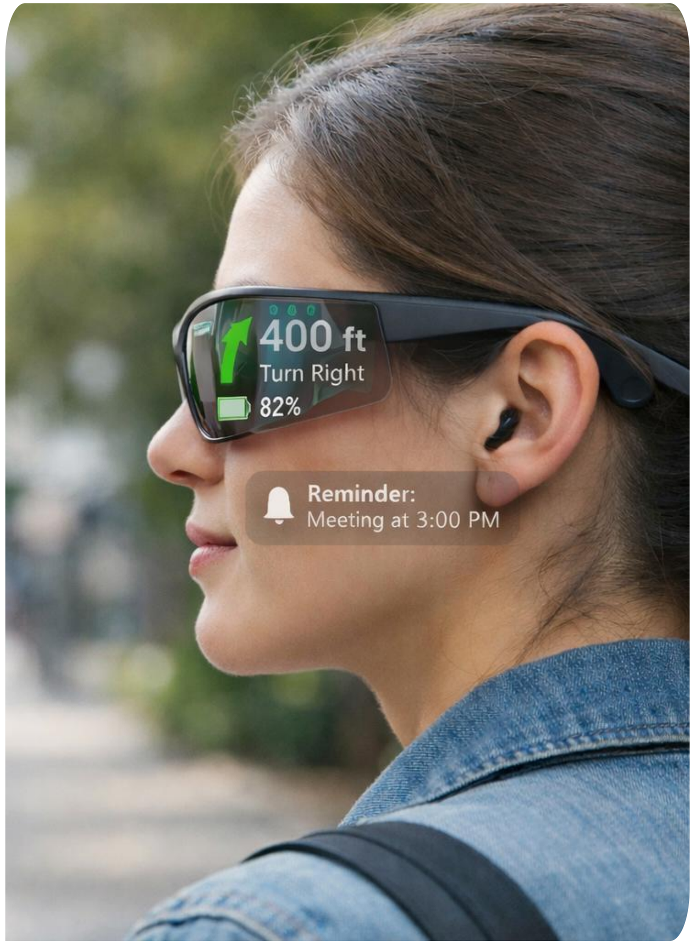
13%
of Wearable Owners & Intenders currently own smart glasses.

39%
are interested in future purchases of smart glasses.

50%
of Gen Z and Millennials are interested in purchasing smart glasses.

Smart glasses boast a wide range of use cases and features in 2026

AI-powered enhances user experience, while Augmented Reality improves the user's point of view



Note: key features is not an exhaustive list but amongst top features. Not all smart glasses include all features

Smart glasses use cases

- **AR/VR gaming**
  Delivers immersive augmented and virtual reality experiences without bulky headsets, enabling interactive gameplay on the go.
- **Live translation**
  Provides real-time language translation and teleprompter text directly in the wearer's field of view for seamless communication and presentations.
- **Audio & entertainment**
  Integrates spatial audio and streaming capabilities, turning eyewear into a personal entertainment hub with voice control.
- **Navigation & everyday utility**
  Displays directions, maps, notifications, and contextual AI assistance hands-free for enhanced productivity and convenience.
- **Remote collaboration & video capture**
  Enables hands-free video calls, live streaming, and AR annotations for work or social sharing.

Key features*

✓ Augmented reality projections
✓ High resolution micro displays
✓ Low-latency sensors
✓ 3D spatial technology

✓ Voice recognition and speech-to-text engines
✓ Text to AR projection
✓ Real time language processing

✓ Built in open-ear speakers
✓ Noise cancellation and adaptive sound
✓ Bluetooth and Wi-Fi connectivity

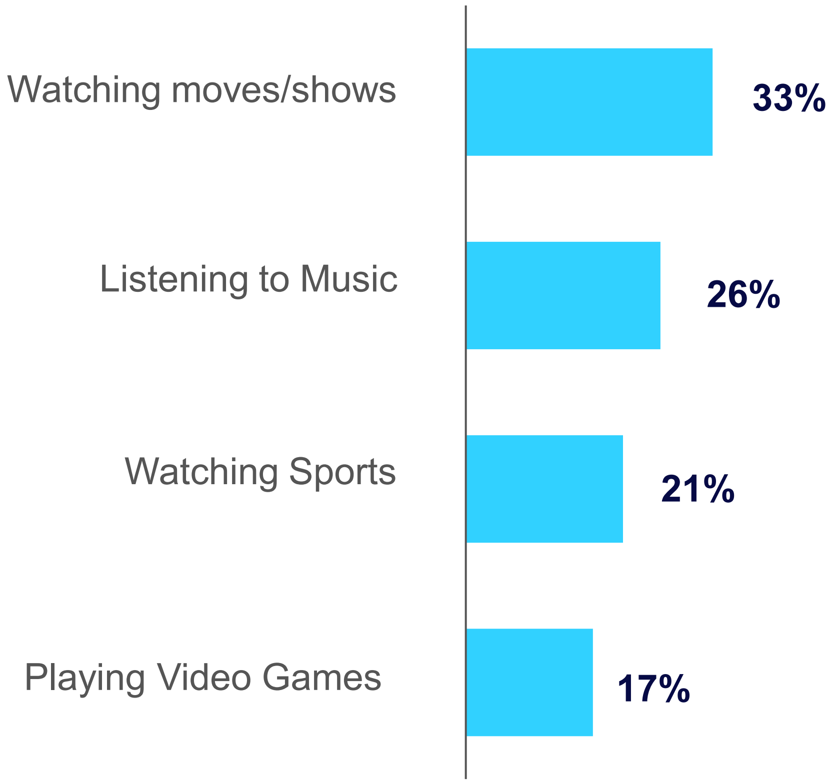
✓ AI-powered contextual assistance
✓ GPS and motion sensors

✓ Integrated high-resolution cameras
✓ Live streaming capabilities

Entertainment in Smart Glasses

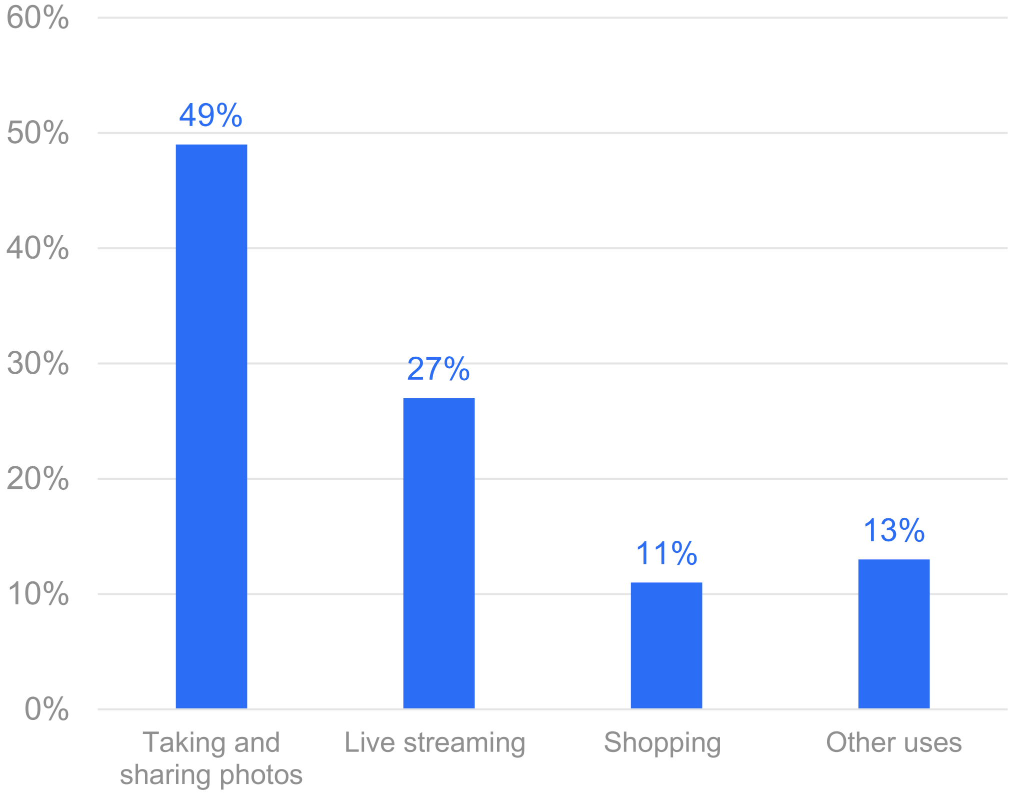
Consumers interested in using smart glasses for entertainment leading benefits include watching movies/shows with theater-like screen quality, listening to music, and watching sports with arena-like views.

Which of the following types of entertainment interest you most with smart glasses?



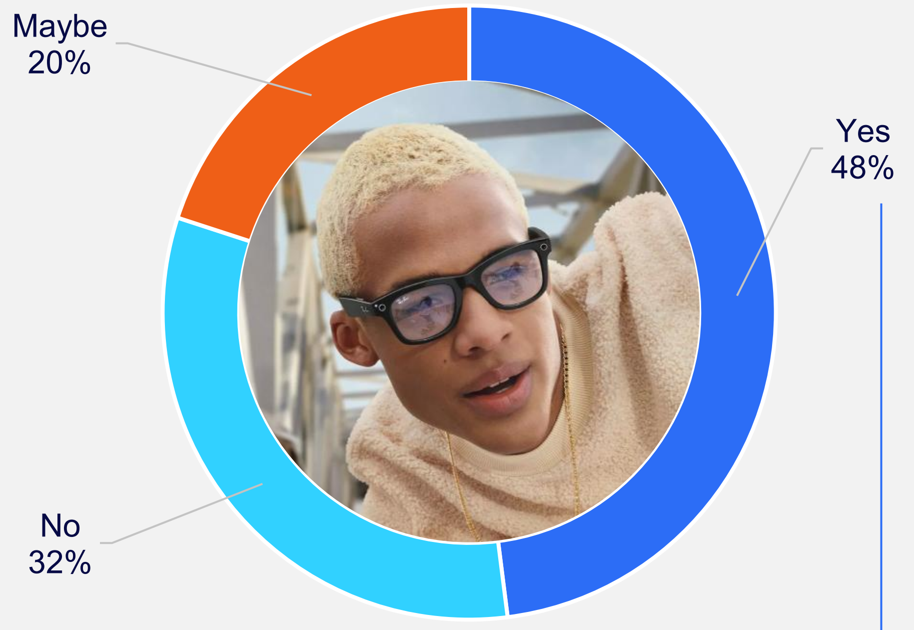
Social Media in Smart Glasses

Interest in social media use in smart glasses is driven by taking and sharing photos followed by live streaming



Prescriptions in Smart Glasses

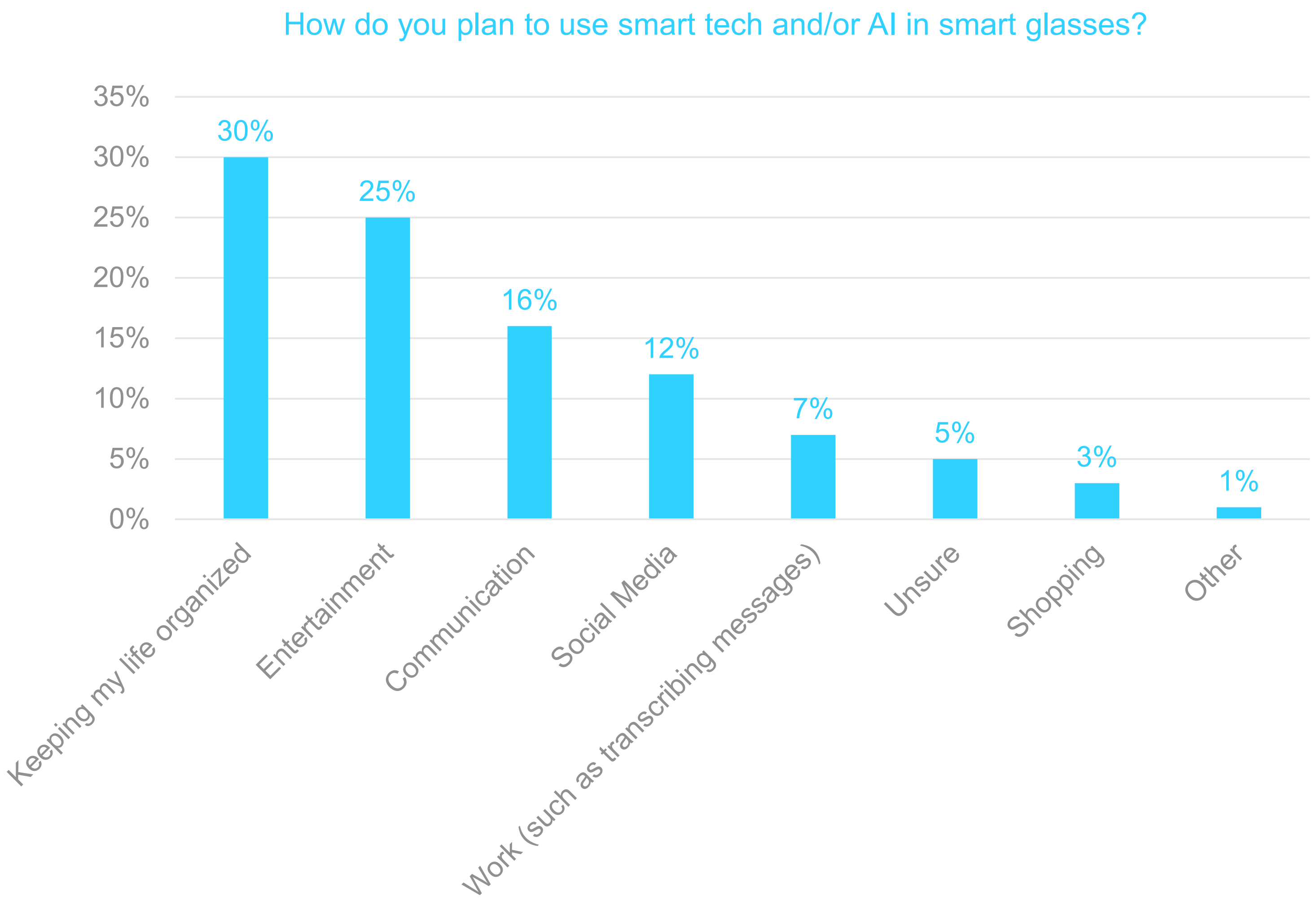
If you were to purchase smart glasses, would you purchase them with prescription lenses?



Manufacturers of smart glasses should consider offering prescription options, as nearly half of those interested in the wearable device would purchase smart glasses with prescription lenses.

AI Use Within Smart Glasses

Owners & Intenders who are interested in smart glasses mainly plan to use smart/AI technology to keep their lives organized and for entertainment.



What This Means for Unlocking Growth in Wearable Tech

Winning in the 2026 Wearables Market

At a broad level, the wearables category reflects two distinct audiences.

Current wearable owners skew younger, more affluent, and more embedded in the workforce, suggesting wearables are deeply integrated into daily routines and lifestyles.

In contrast, those intending to adopt skew older and more male, signaling that wearables are still expanding into later-life and more utilitarian use cases. Importantly, education levels are similar across both groups, reinforcing that adoption barriers are less about awareness and more about relevance, comfort, and value.

Smartwatches Lead in Wearables

Smartwatches clearly anchor the category today, functioning as the primary wearable hub for most consumers. Fitness bands and smart audio devices follow closely, reinforcing that **health-related utility and everyday convenience** are the dominant entry points into wearables.

Clear Growth Opportunity for Emerging Wearables

This report highlights the meaningful gap between ownership and interest for newer form factors like smart rings and smart glasses, especially among Gen Z and Millennials.

This signals that while these categories remain niche today, they represent a **clear growth opportunity for brands** willing to target early adopters with compelling use cases and accessible designs.

Driving Performance in the Wearables Market

Across devices, fitness and exercise tracking remains the core value proposition, but the report shows growing segmentation in how wearables are expected to perform.

Younger users lean toward innovation, entertainment, and experimentation, while **older consumers and intenders increasingly prioritize health monitoring and condition management**—even if they recognize current limitations in medical-grade insights.

From Insight to Impact: The Wearables Opportunity Ahead

Adoption, Expectations, and What's Next

Growth will increasingly come from trade-up and adjacent categories, not first-time adoption alone.

Emerging form factors like smart rings and smart glasses require clear, benefit-driven storytelling—not just innovation claims.

Comfort, battery life, and transparency remain non-negotiables for broader adoption.

Consumers view smart glasses as tools for organization, entertainment, and experiences rather than replacements for phones or traditional screens.

Ecosystem strength and value articulation will determine both brand leadership and subscription viability.

Retail strategy must balance price competitiveness with experience, especially as younger consumers expect speed, flexibility, and reassurance.

Thank you for reading…

Unlocking Growth in Wearable Tech

Contact NielsenIQ

Win the wearable technology market with sales measurement and competitive intelligence across retail, D2C, and marketplaces. Set your brand apart with enhanced consumer insights that uncover the needs and motivations behind people's purchase behavior.

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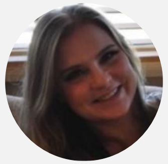

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About this Study

NielsenIQ BASES Quick Question

- Primary Audience:
  Customers who own/use a wearable device or are open to owning/using a wearable device in the next 12 months
- N = 500
- Fielded March 2026
- Generational Age Cuts
  - Gen Z – 18-28 years old
  - Millennials – 29-44 years old
  - Gen X – 45-60 years old
  - Boomers – 61-80 years old

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