

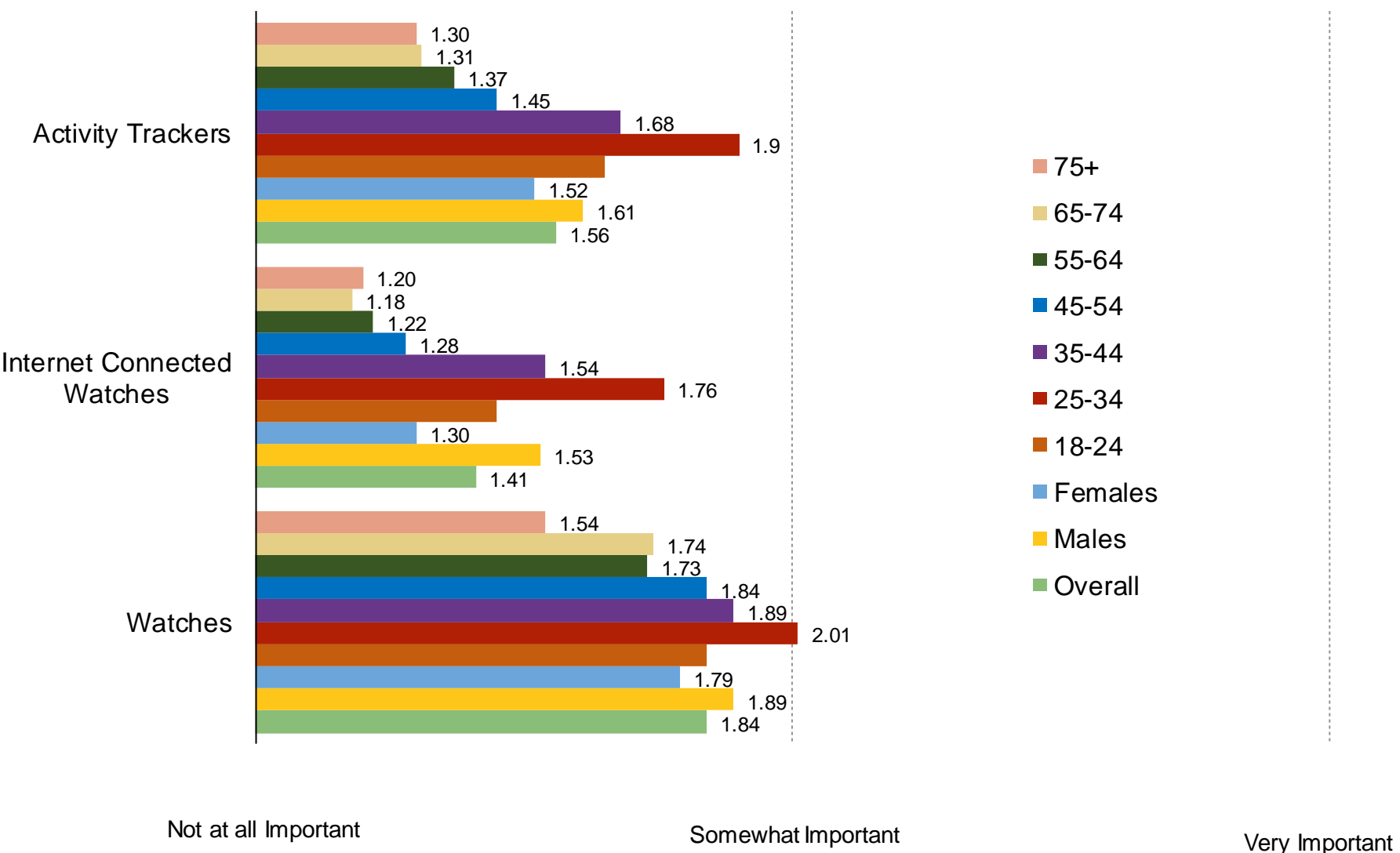
WATCHES, ACTIVITY TRACKERS, AND INTERNET CONNECTED WATCHES ARE ALL MORE IMPORTANT TO 25-34 YEAR-OLDS COMPARED TO OTHER DEMOGRAPHICS. THEY ARE ALSO ALL MORE IMPORTANT TO MALES THAN THEY ARE TO FEMALES.

This question was posed to all respondents.

A horizontal stacked bar chart comparing the usage of three types of wearable devices: Activity Trackers, Internet Connected Watches, and Watches. The x-axis represents the percentage of respondents, ranging from 0% to 100% in 20% increments. The y-axis lists the device types. Each bar is divided into three segments: red for 'Daily', blue for 'Weekly', and green for 'Not at all'.

Device Type	Daily (%)	Weekly (%)	Not at all (%)
Activity Trackers	57.4%	29.0%	13.6%
Internet Connected Watches	68.6%	21.4%	9.9%
Watches	38.8%	38.5%	22.7%

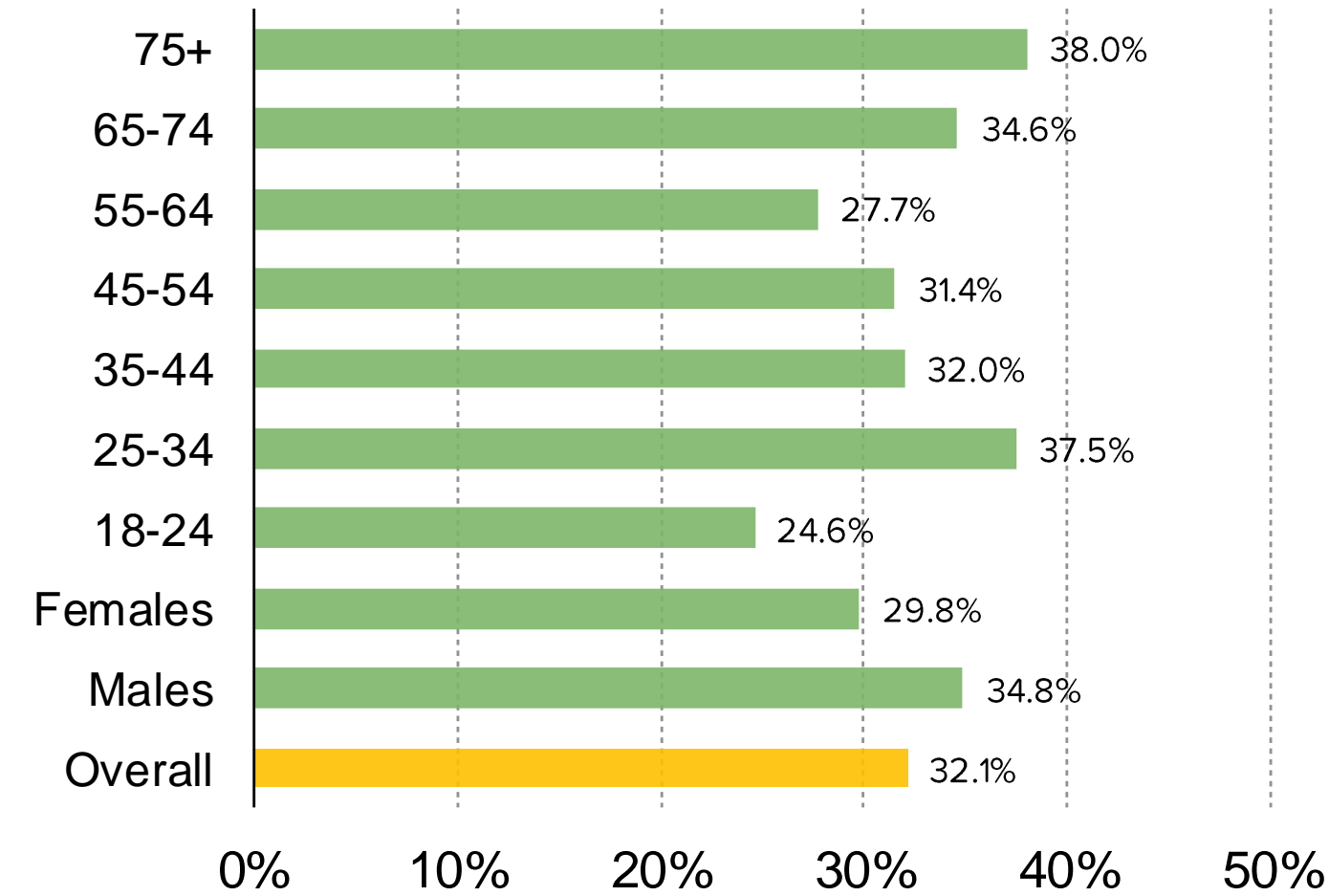
This question was posed to all respondents.



18-24 YEAR-OLDS ARE LEAST LIKELY TO RESPOND THAT THEY WEAR A WATCH EVERY DAY.

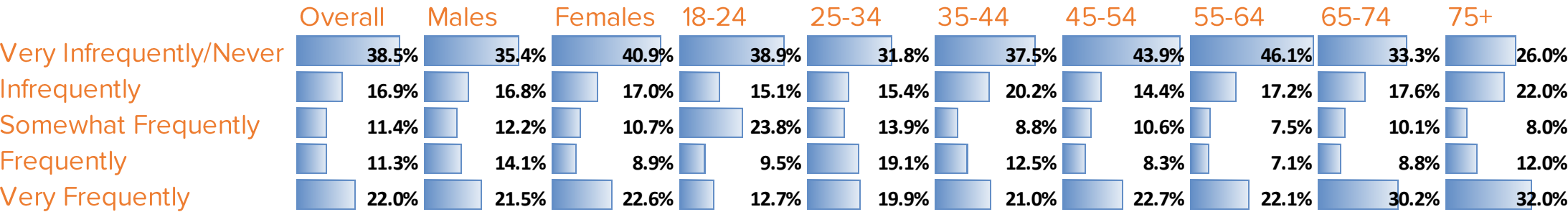
WEARS A WATCH EVERY DAY, BY DEMOGRAPHIC

This question was posed to all respondents.

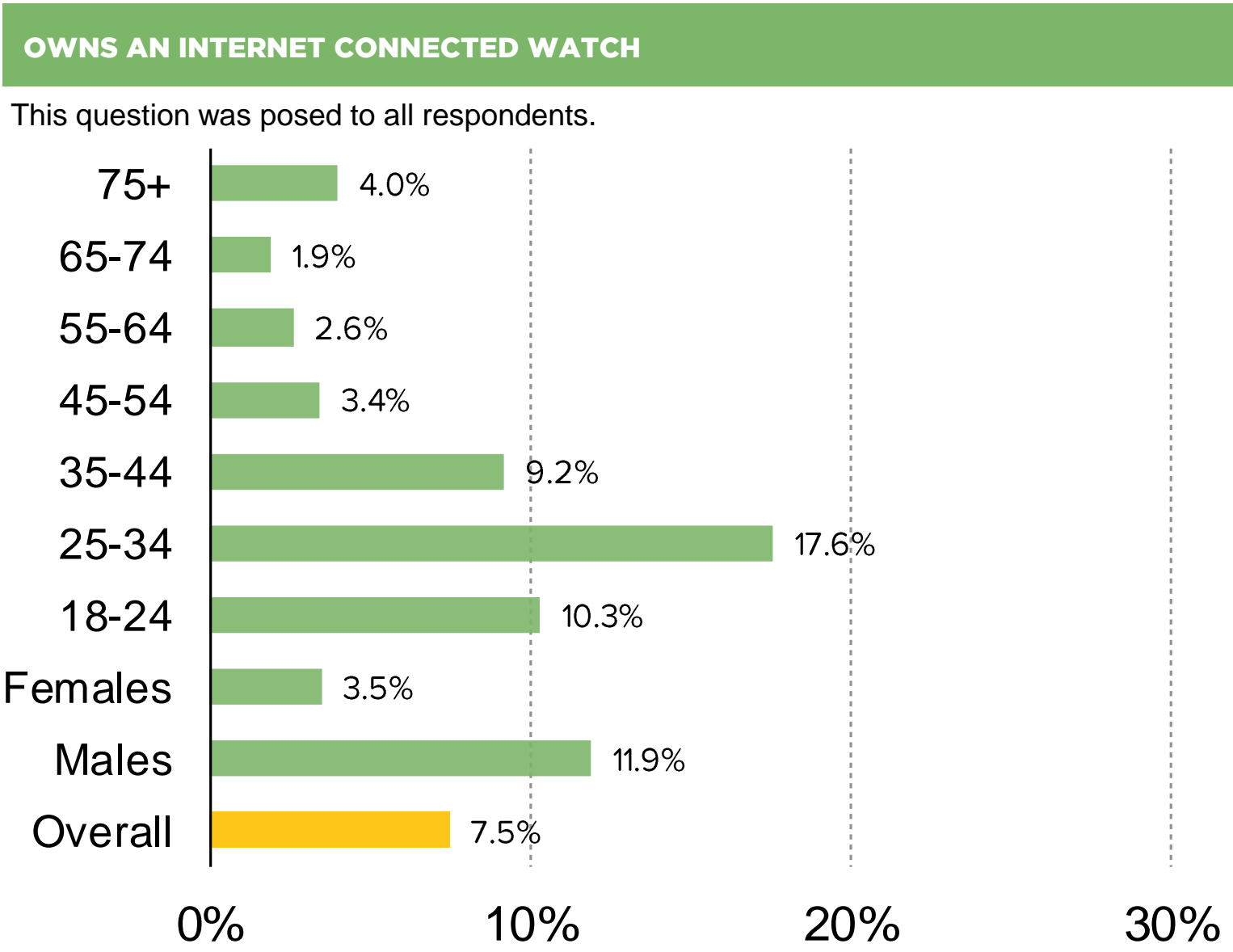


IN GENERAL, HOW OFTEN DO YOU WEAR A WATCH?

This question was posed to all respondents.



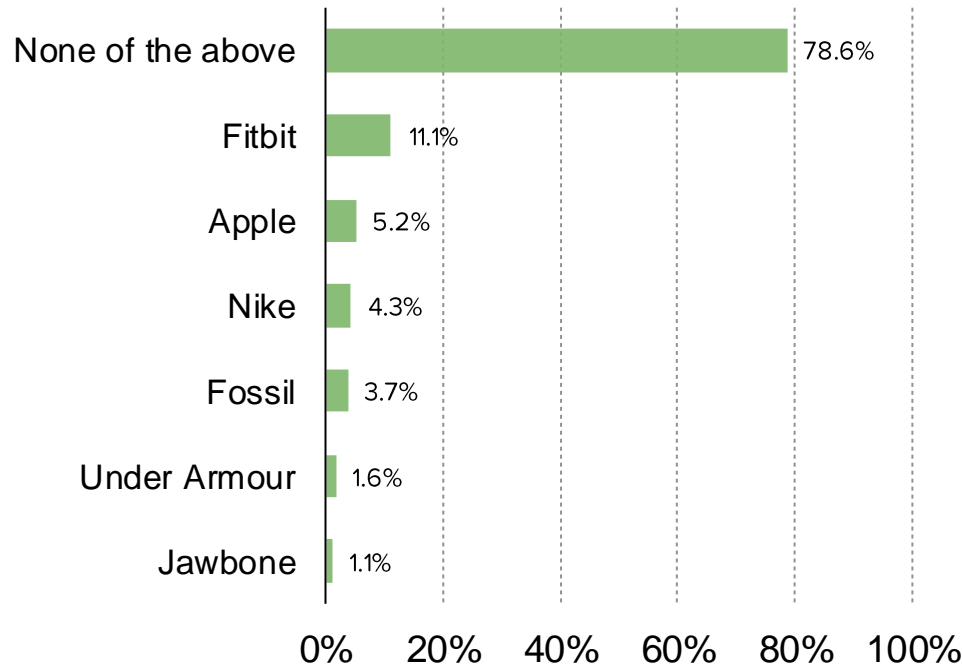
25-34 YEAR-OLDS ARE MOST LIKELY TO OWN AN INTERNET CONNECTED WATCH. MALES ARE MUCH MORE LIKELY THAN FEMALES TO OWN AN INTERNET CONNECTED WATCH.



FITBIT IS THE MOST POPULAR BRAND OUT OF THOSE TESTED IN OUR SURVEY, FOLLOWED BY APPLE.

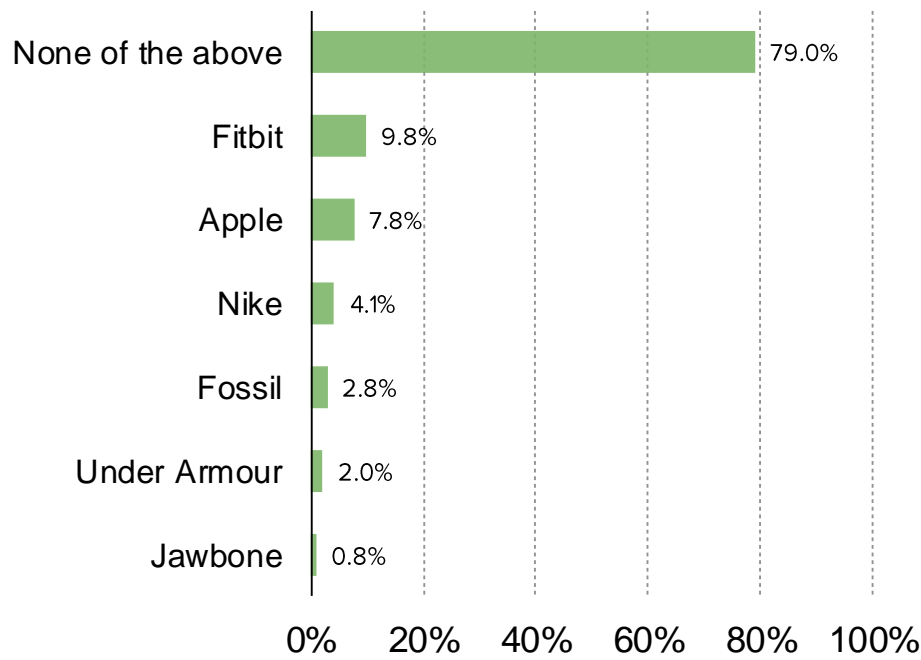
OWNS WATCHES OR FITNESS TRACKERS FROM THE FOLLOWING BRANDS

This question was posed to all respondents.



PLANS TO PURCHASE WATCHES OR FITNESS TRACKERS FROM THE FOLLOWING BRANDS

This question was posed to all respondents.



BROKEN DOWN BY DEMOGRAPHICS

	Overall	Males	Females	18-24	25-34	35-44	45-54	55-64	65-74	75+
Jawbone	1.1%	1.7%	0.6%	0.0%	2.3%	2.2%	0.0%	1.1%	0.0%	0.0%
Under Armour	1.6%	2.6%	0.7%	2.4%	5.2%	0.4%	0.4%	1.1%	0.0%	2.0%
Fossil	3.7%	4.5%	3.0%	3.2%	8.2%	4.0%	3.0%	1.5%	1.9%	0.0%
Nike	4.3%	6.6%	2.4%	9.5%	12.0%	4.0%	1.9%	0.4%	0.0%	0.0%
Apple	5.2%	8.3%	2.1%	10.3%	12.4%	7.0%	1.5%	1.1%	0.6%	0.0%
Fitbit	11.1%	11.9%	10.5%	15.9%	17.2%	15.4%	7.6%	7.9%	3.1%	4.0%
None of the above	78.6%	73.6%	83.3%	71.4%	56.6%	73.5%	87.5%	88.4%	94.3%	94.0%

BROKEN DOWN BY DEMOGRAPHICS

	Overall	Males	Females	18-24	25-34	35-44	45-54	55-64	65-74	75+
Jawbone	0.8%	1.4%	0.1%	0.0%	2.3%	0.7%	0.8%	0.4%	0.0%	0.0%
Under Armour	2.0%	3.0%	1.1%	2.4%	4.9%	2.6%	1.1%	0.4%	0.6%	0.0%
Fossil	2.8%	4.2%	1.7%	2.4%	6.7%	2.6%	2.3%	1.5%	1.3%	0.0%
Nike	4.1%	6.8%	1.8%	8.7%	10.5%	4.4%	0.8%	1.5%	0.6%	0.0%
Apple	7.8%	10.1%	5.5%	13.5%	16.1%	8.5%	4.2%	3.0%	5.0%	0.0%
Fitbit	9.8%	8.3%	11.0%	14.3%	15.0%	11.4%	8.0%	7.5%	4.4%	0.0%
None of the above	79.0%	76.1%	82.0%	68.3%	64.0%	74.6%	84.9%	86.9%	90.6%	0.0%

BESPOKE MARKET INTELLIGENCE

FOSL SURVEY RESULTS

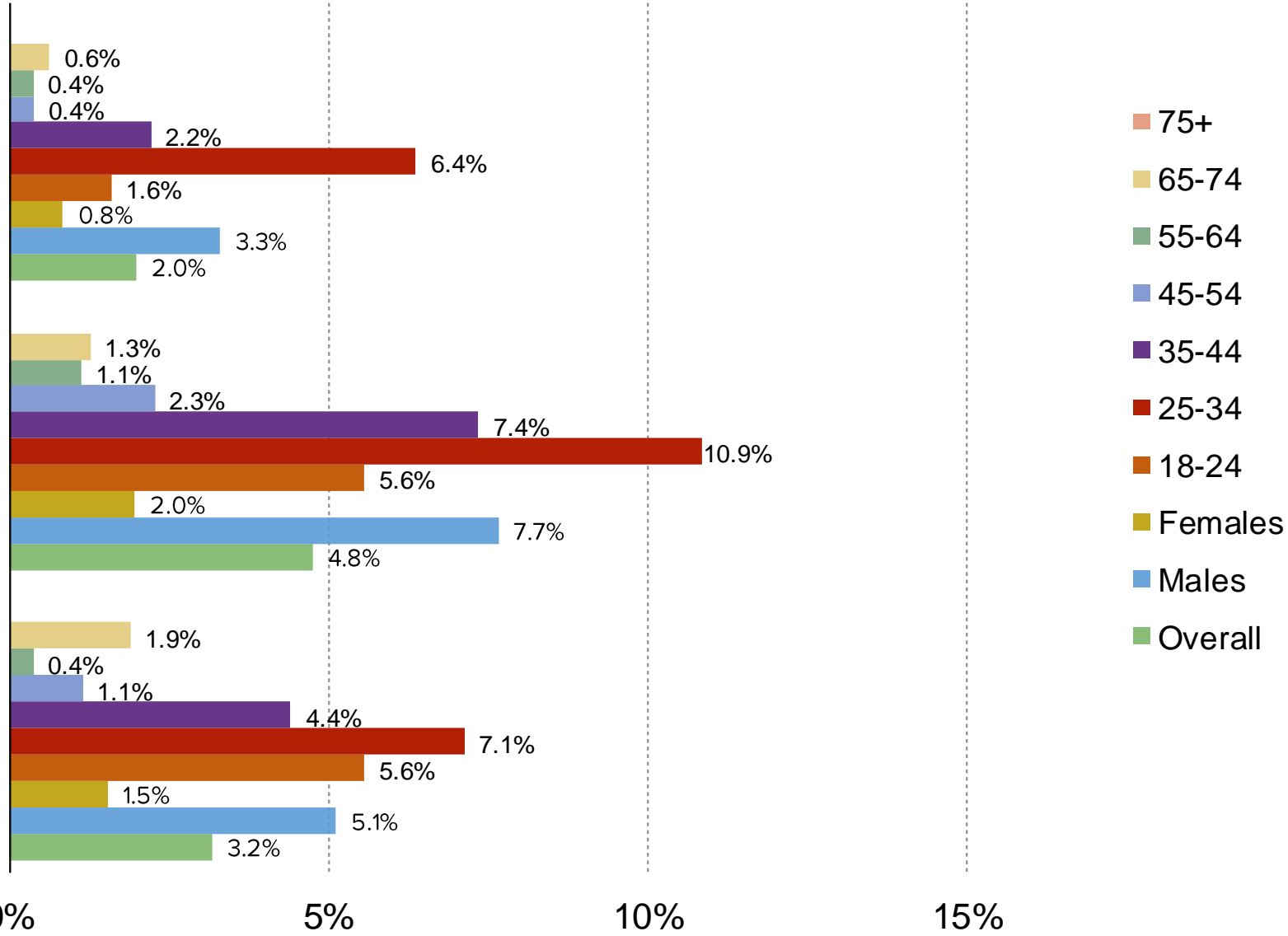
1,409 US Consumers, Balanced to Census

OUT OF THE THREE FOSSIL PRODUCT OPTIONS DISPLAYED TO CONSUMERS, THE NON-DISPLAY SMARTWATCHES WERE THE MOST COMMONLY OWNED.

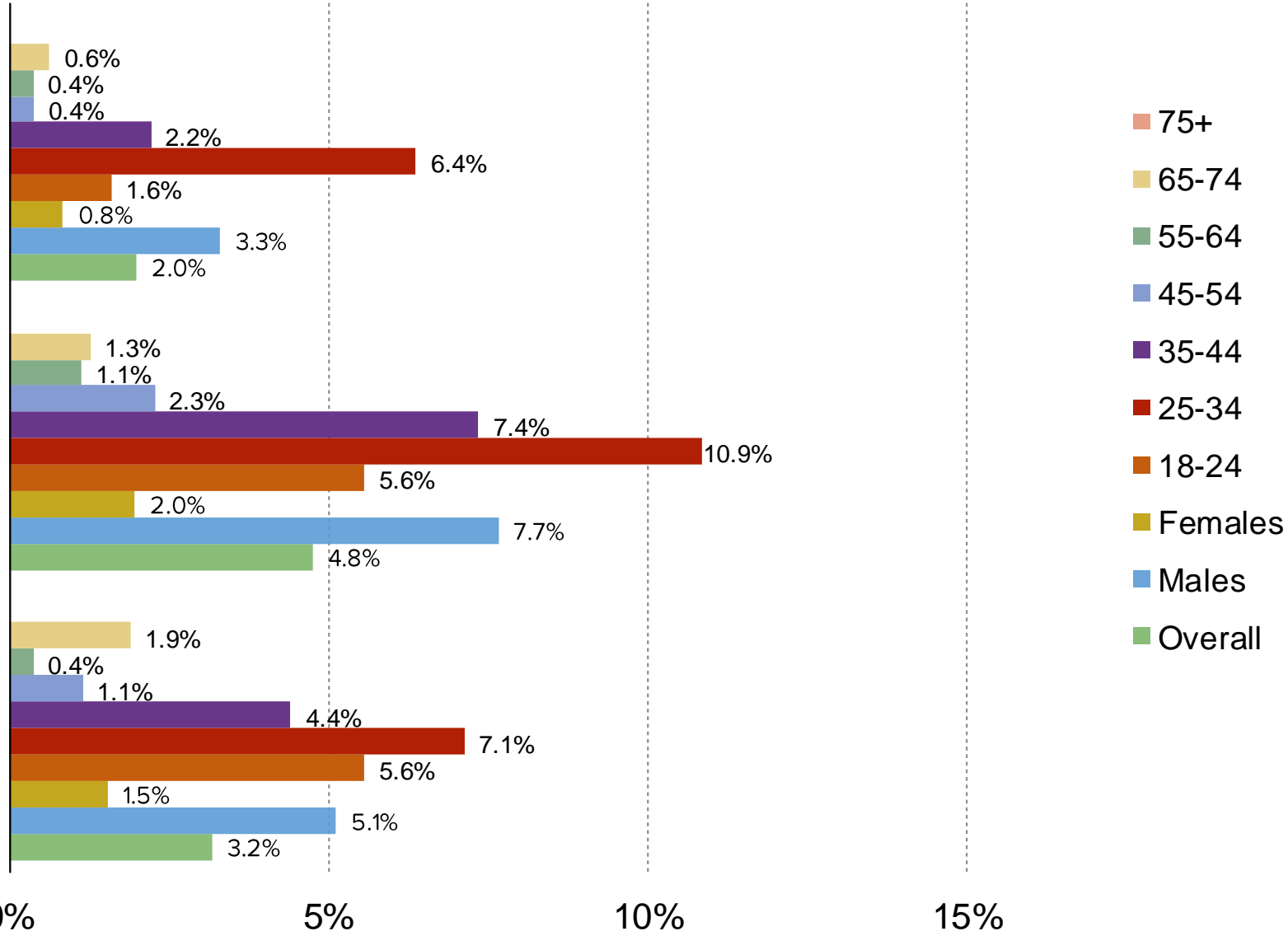


OWNS THE FOSSIL WATCH LIKE THE ONE PICTURED (RESPONDENTS WERE SHOWN THE IMAGES DISPLAYED TO THE LEFT)

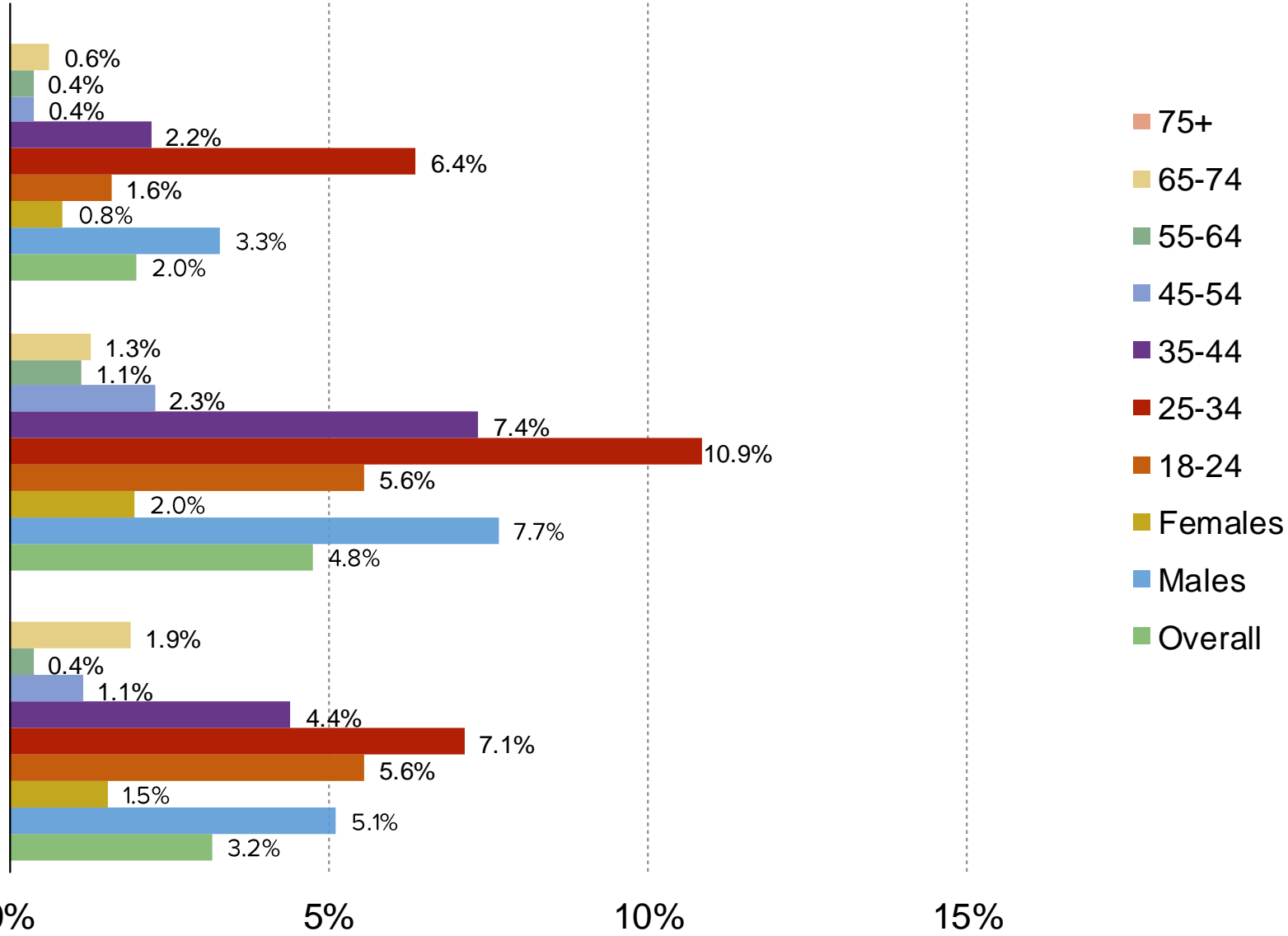
Activity



Non Display



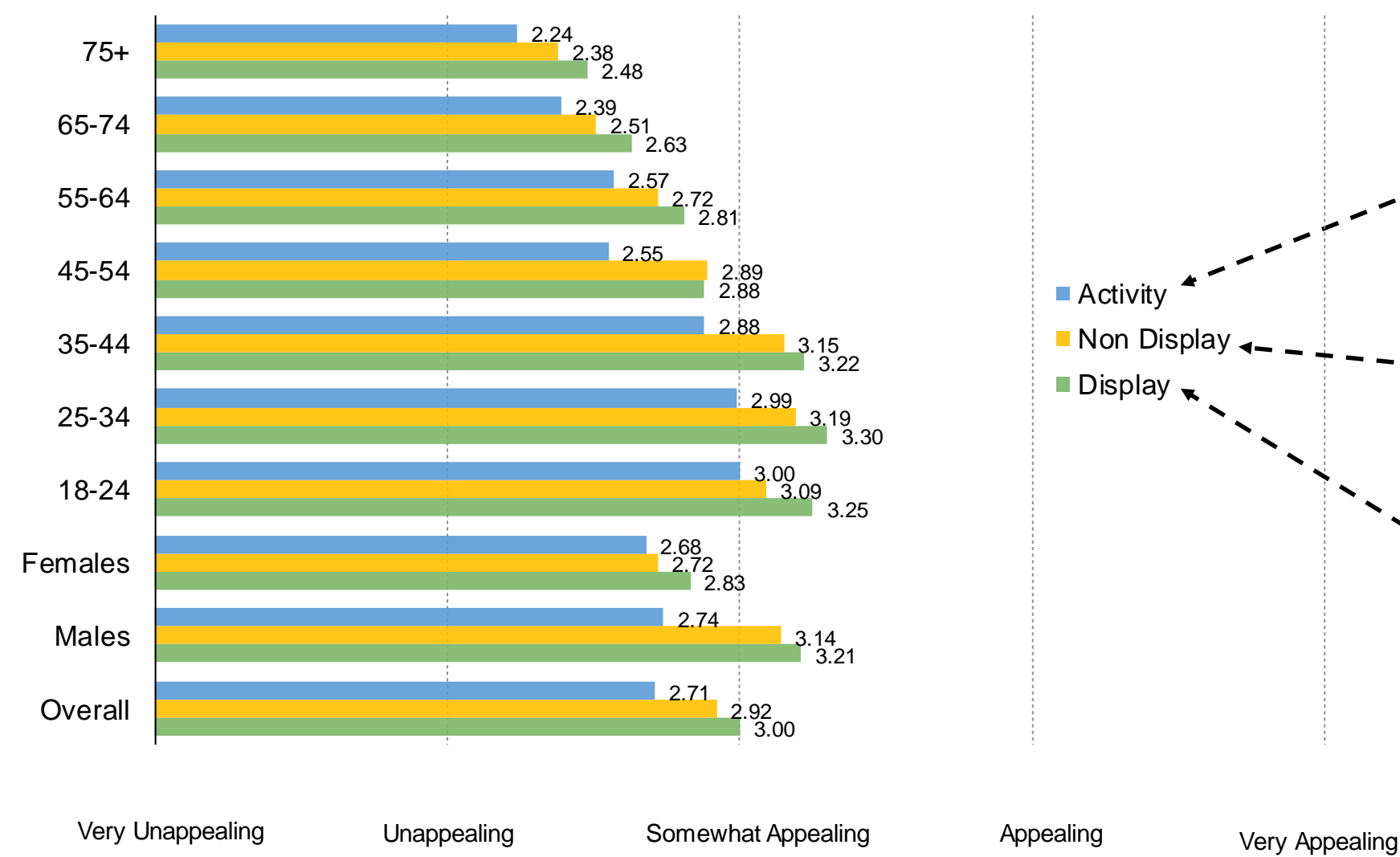
Display





OUT OF THE THREE FOSSIL PRODUCT OPTIONS SHOWN TO RESPONDENTS, THE DISPLAY WATCH WAS MOST APPEALING, ON AVERAGE, FOLLOWED CLOSELY BY THE NON-DISPLAY SMARTWATCH.

HOW APPEALING DO YOU FIND THE PRODUCTS PICTURED? (RESPONDENTS WERE SHOWN THE IMAGES DISPLAYED TO THE LEFT)



BESPOKE MARKET INTELLIGENCE

FOSL SURVEY RESULTS

1,409 US Consumers, Balanced to Census

A PLURALITY OF CONSUMERS WERE DRAWN TO THE DISPLAY WHEN FORCED TO CHOOSE. YOUNGER RESPONDENTS WERE MORE LIKELY TO BE INTERESTED IN THESE FOSSIL PRODUCTS AND WOMEN GRAVITATED MORE TOWARD THE ACTIVITY TRACKER.



IF YOU HAD TO CHOOSE TO GET ONE OF THE THREE OPTIONS PICTURED IN THE ANSWER CHOICES, WHICH WOULD YOU PICK?

