



Wearable Technology Trends

Dip in Wearable Tech Demand – But Apple and Fitbit Remain on Top

Lusy Lisyanova and Andy Golub

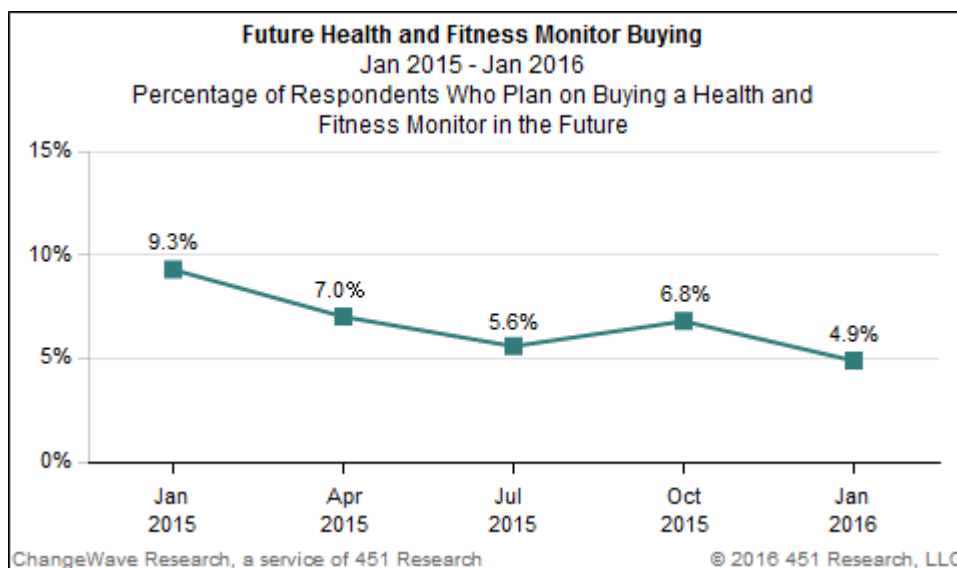
Overview: A new ChangeWave wearable trends survey shows demand for smart watches and health and fitness monitors slowing after an uptick over the holidays.

Fitbit is well ahead of the pack in the fitness tracker market, and Apple continues to hold the top position in the smart watch space.

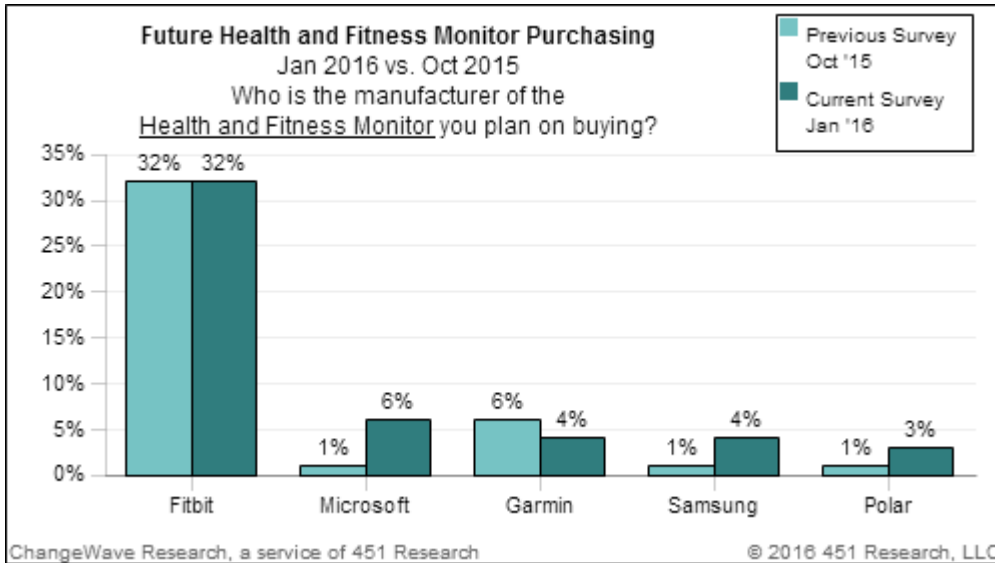
The January 4-18 survey of 2,381 consumers also looked at other key wearable trends, including factors influencing purchase decisions and customer satisfaction. ChangeWave Research is a service of 451 Research.

Fitbit Holds Big Lead in Slowing Health & Fitness Market

Looking ahead we're seeing demand for health and fitness monitors pullback in the aftermath of the holidays. A total of 4.9% of respondents say they plan on buying one in the future – down 1.9-pts since the October survey.

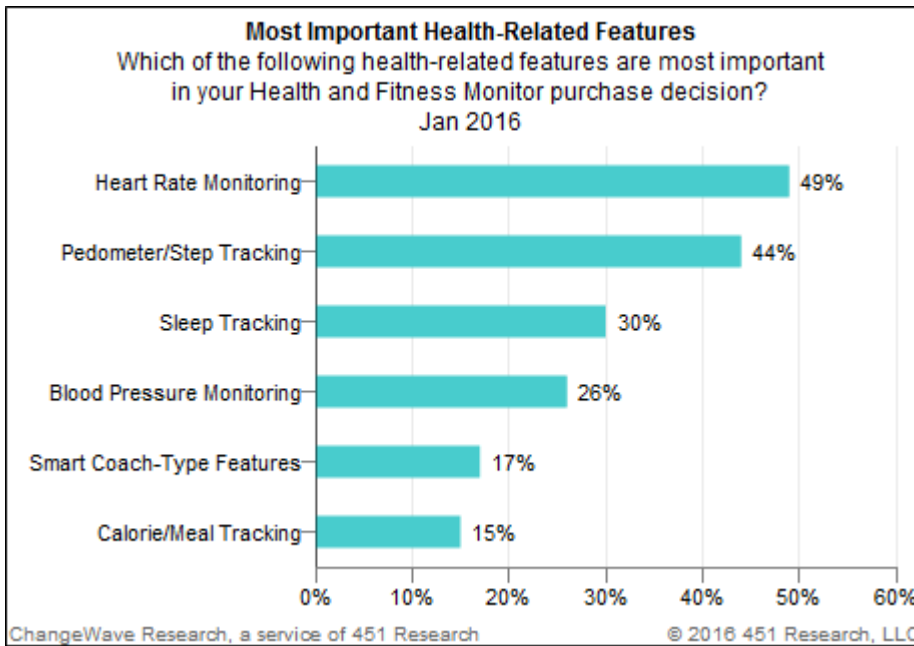


Among this group, Fitbit (32%) remains the overwhelming top choice – unchanged from previously. In a surprise move, Microsoft (6%) has jumped into second place – up 5-pts from previously – likely attributed to their late-October release of Microsoft Band 2.

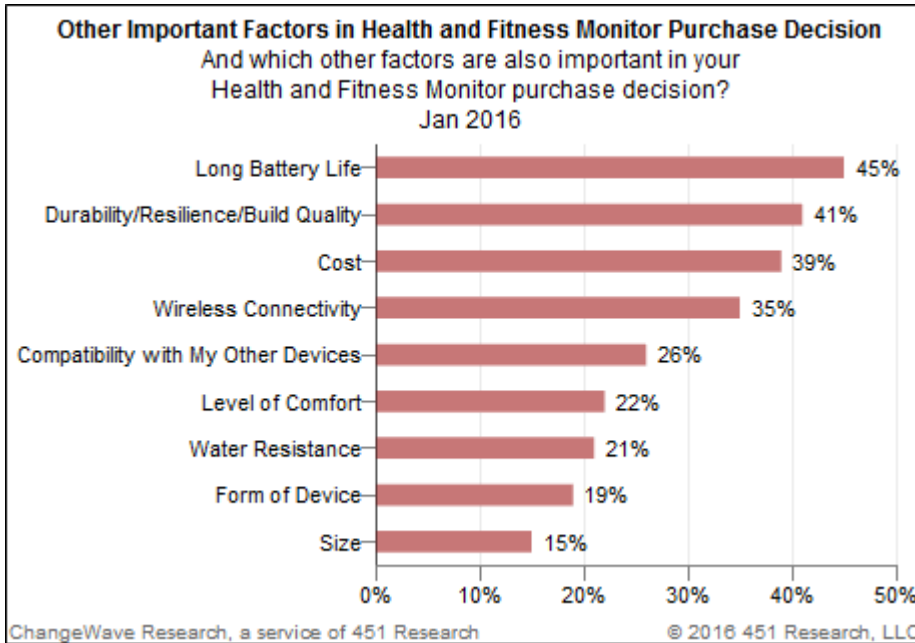


In a potential opening for Fitbit’s competitors, nearly half (47%) of future health and fitness monitor buyers say they don’t yet know which brand they’ll purchase.

Key Factors in Health and Fitness Monitor Purchase Decision. *Heart Rate Monitoring* (49%) is the top health-related feature that buyers are looking for in a fitness monitor, closely followed by *Pedometer/Step Tracking* (44%). *Sleep Tracking* (30%) and *Blood Pressure Monitoring* (26%) are also important considerations.



In terms of non-health related factors that consumers cite as being important in their purchase decision, *Long Battery Life* (45%) tops the list, followed by *Durability/Resilience/Build Quality* (41%), *Cost* (39%), and *Wireless Connectivity* (35%).

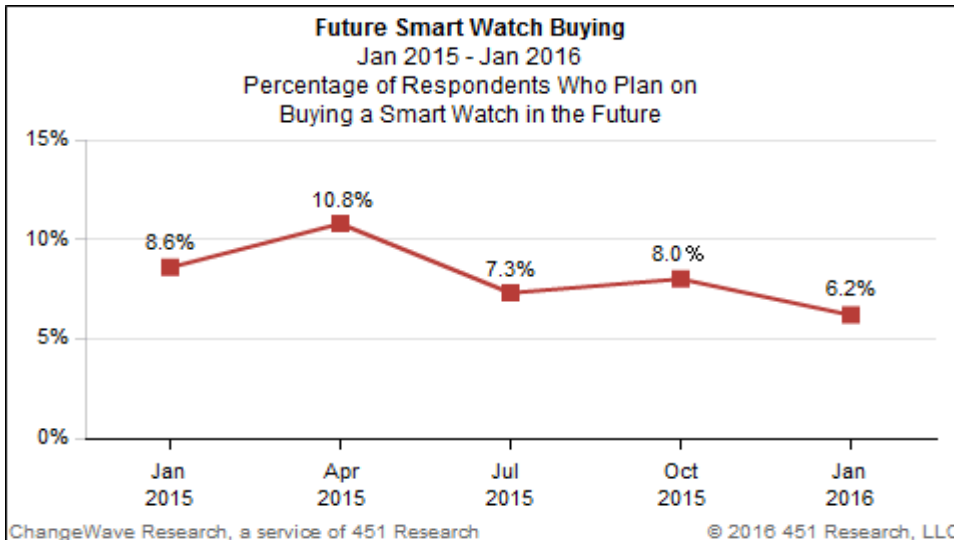


Health & Fitness Monitor Satisfaction. Focusing on customer satisfaction, 33% of Fitbit owners say they're *Very Satisfied* and 49% *Somewhat Satisfied*, which is higher than the satisfaction rating for all other manufacturers combined (33% *Very Satisfied*; 40% *Somewhat*).

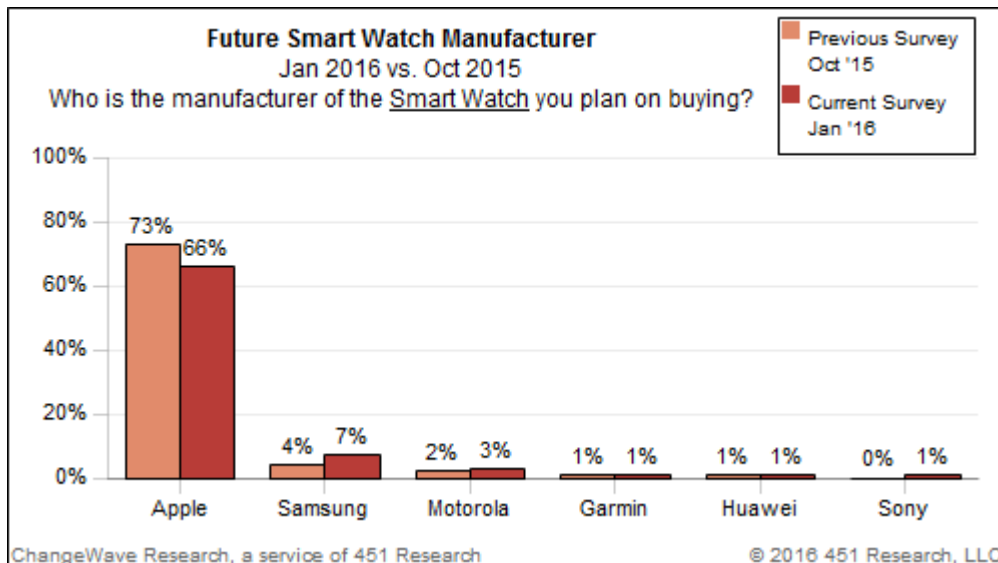
Health & Fitness Monitor Satisfaction Ratings	Fitbit Owners	All Other Health & Fitness Monitor Owners
Very Satisfied	33%	33%
Somewhat Satisfied	49%	40%

Apple Remains Leader in Slowing Smart Watch Space

Similar to health and fitness monitors, the results show demand for smart watches slowing, with 6.2% of respondents saying they plan on buying one in the future – down 1.8-pts from the previous survey.



Apple continues to dominate in terms of future demand, with a total of 66% of planned smart watch buyers saying they'll get an Apple Watch – but that's down 7-pts from previously.



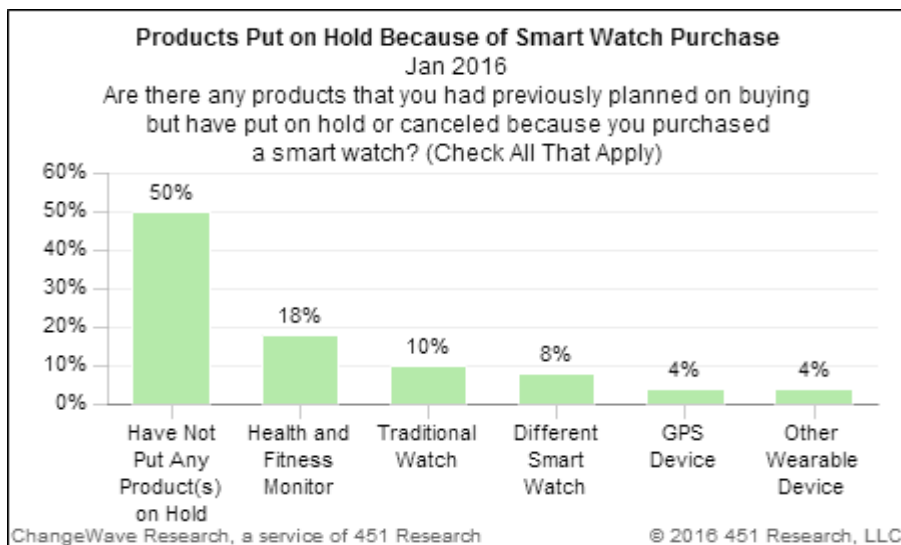
The rest of the manufacturers remain far behind, though Samsung (7%) is registering a 3-pt increase and Motorola (3%) is up 1-pt.

Smart Watch Satisfaction. Apple outperforms in smart watch customer satisfaction, with nearly three-in-five (57%) Apple Watch owners saying they're *Very Satisfied* – double the rating among all other smart watch owners (29%).

Smart Watch Satisfaction Ratings	Apple Watch Owners	All Other Smart Watch Owners
Very Satisfied	57%	29%
Somewhat Satisfied	37%	49%

Products Put On Hold. We asked current smart watch owners if there are any purchases they had put on hold or cancelled because they had bought a smart watch.

While half (50%) of this group say they haven't put any products on hold, 18% say they're putting off buying a health and fitness monitor, and 10% a traditional watch.



Blurring Lines – Smart Watches and Health & Fitness Monitors. The line between the two leading types of wearable devices continue to blur, as manufacturers are launching hybrid devices that combine features of both.

Fitbit recently announced such a device – the Blaze smart fitness watch – which will be released in March. Features include a color touch screen, heart rate monitoring, call and text notifications, and calendar alerts. The Fitbit Blaze will have several band styles and starts at \$199.

We asked all respondents if they are likely to purchase a Fitbit Blaze smart fitness watch in the future, and 7% say they are likely (1% *Very Likely*; 6% *Somewhat Likely*). Not surprisingly, likelihood among planned wearable tech buyers is significantly higher (3% *Very Likely*; 22% *Somewhat Likely*).

Among those interested in buying the Blaze, 27% expect to use it equally as both a health and fitness monitor and a smart watch – an indication that buyers would leverage the features of both types of wearables. At the same time, nearly half (47%) say they will primarily use it as a health and fitness monitor, while 15% say primarily as a smart watch.

Frequency of Use: Health and Fitness Monitors vs. Smart Watches. We also asked wearable owners who have had their device for at least three months how often they plan on using it going forward.

One-in-ten (10%) health and fitness monitor owners say they’ll use their device *More Often* over the next 90 days compared to the previous 90 days vs. 11% *Less Often*. In terms of smart watch owners, 18% say they’ll use their device *More Often* vs. 14% *Less Often*.

For those who have owned a health and fitness monitor or smart watch for at least 3 months, do you plan on using your device more often over the next 90 days, less often, or about the same compared to the previous 90 days?

Frequency of Use Over Next 90 Days Compared to Previous 90 Days	Health & Fitness Monitor Owners	Smart Watch Owners
More Often	10%	18%
About the Same	79%	68%
Less Often	11%	14%

Bottom Line. ChangeWave’s latest survey points to slower consumer demand for both health and fitness monitors and smart watches, in the aftermath of the uptick registered over the holidays.

Fitbit devices remain most popular among future fitness tracker buyers. The other competitors are far behind, but Microsoft is seeing a surprising uptick in demand.

Heart rate monitoring and pedometer/step tracking are the health-related features planned buyers ranked as most important when purchasing a health and fitness monitor. Long battery life, durability/resilience/build quality, and cost are other important factors.

Apple continues to dominate the smart watch space. Samsung is registering an uptick in demand, but remains in a distant second place.

There are a growing number of wearable devices on the market that offer a combination of health and fitness monitor and smart watch features, such as Samsung Gear Fit, Fitbit Surge, Basis Peak, and the Garmin Vivosmart.

One of the newest entrants in this space is the Fitbit Blaze, and the results point to interest in the yet-to-be released hybrid device. Importantly, better than one-in-four planned buyers say they'll use it equally as both a fitness monitor and smart watch.

Summary of Key Findings

<p>Fitbit Holds Big Lead in Slowing Health & Fitness Market</p> <p>Buying Plans Going Forward</p> <ul style="list-style-type: none"> • Fitbit (32%; unchanged) • Microsoft (6%; up 5-pts) • Garmin (4%; down 2-pts) • 47% aren't sure which brand they'll purchase <p>Key Features in Fitness Monitor Purchase Decision</p> <ul style="list-style-type: none"> • 49% Heart Rate Monitoring • 44% Pedometer/Step Tracking • 30% Sleep Tracking <p>Other Important Non-Health Factors</p> <ul style="list-style-type: none"> • 45% Long Battery Life • 41% Durability/Resilience/Build • 39% Cost 	<p>Apple Remains Leader in Slowing Smart Watch Space</p> <p>Buying Plans Going Forward</p> <ul style="list-style-type: none"> • Apple (66%; down 7-pts) • Samsung (7%; up 3-pt) • Motorola (3%; up 1-pt) <p>Smart Watch Satisfaction</p> <ul style="list-style-type: none"> • Apple Watch Owners <ul style="list-style-type: none"> - 57% <i>Very Satisfied</i> - 37% <i>Somewhat Satisfied</i> • All Other Owners <ul style="list-style-type: none"> - 29% <i>Very Satisfied</i> - 49% <i>Somewhat Satisfied</i> <p>Products Put On Hold Because of Smart Watch Purchase</p> <ul style="list-style-type: none"> • Have Not Put Any Product(s) on Hold (50%) • Health & Fitness Monitor (18%) • Traditional Watch (10%) • Different Smart Watch (8%) 	<p>Frequency of Use: Health Monitors vs. Smart Watches</p> <ul style="list-style-type: none"> • 10% of health and fitness monitor owners say they'll use their device <i>More Often</i> over next 90 days compared to the previous 90 days vs. 11% <i>Less Often</i> • 18% say they'll use their smart watch <i>More Often</i> vs. 14% <i>Less Often</i> <p>Interest in Fitbit Blaze Hybrid Device</p> <ul style="list-style-type: none"> • 7% say they're likely to buy a Fitbit Blaze smart fitness watch in future (1% <i>Very Likely</i>; 6% <i>Somewhat</i>) • Likelihood among planned wearable buyers is significantly higher (3% <i>Very</i>; 22% <i>Somewhat</i>) • Among those interested, 27% expect to use it equally as <u>both</u> a fitness monitor and a smart watch
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The **ChangeWave Research Network** is a group of 25,000 highly qualified business and technology professionals – as well as early adopter consumers – who work in leading companies of select industries. ChangeWave surveys its Network members weekly on a range of business and consumer topics, and converts the information into a series of proprietary quantitative and qualitative reports.

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The Findings

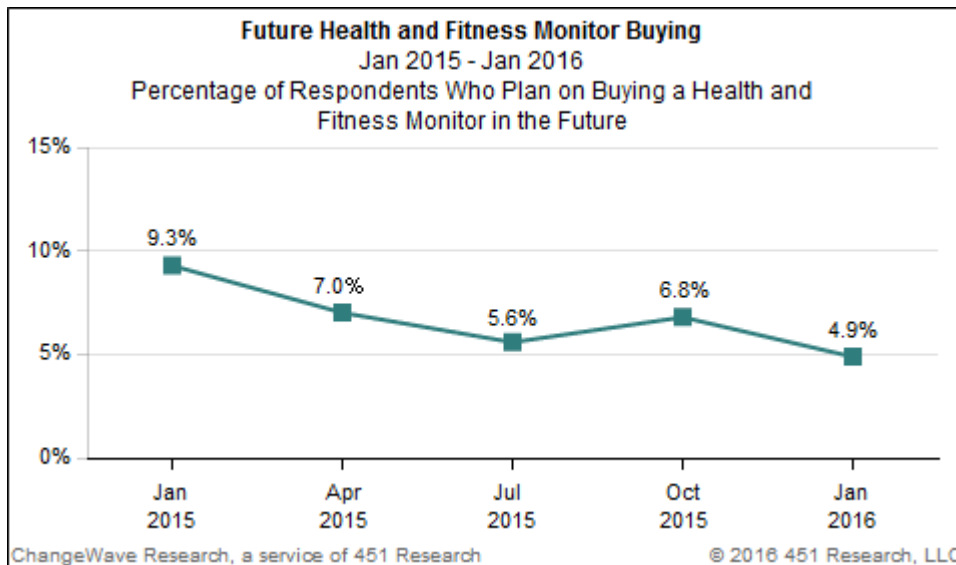
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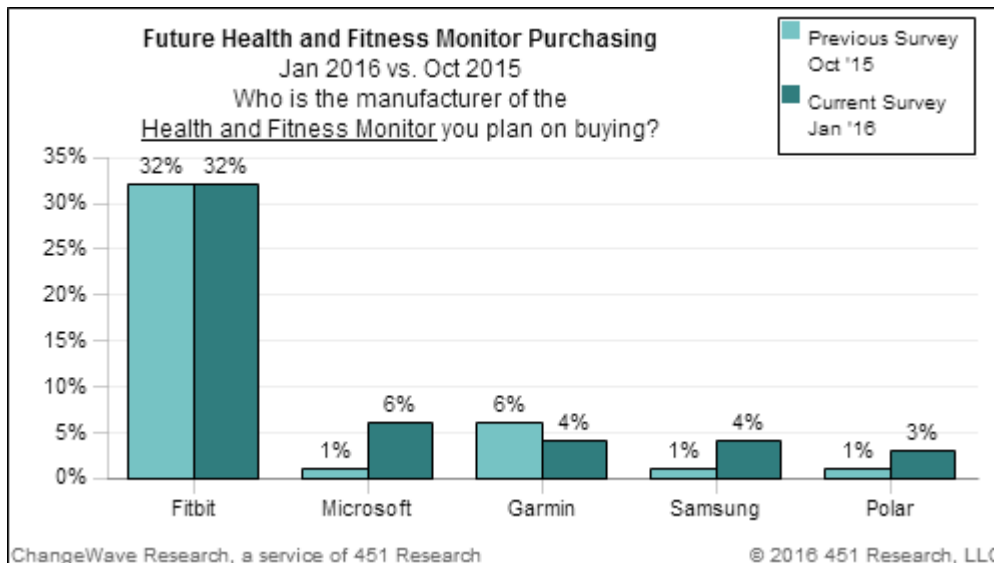
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In a potential opening for Fitbit’s competitors, nearly half (47%) of future health and fitness monitor buyers say they don’t yet know which brand they’ll purchase.

Who is the manufacturer of the Health and Fitness Monitor you plan on buying?

	Current Survey Jan '16	Previous Survey Oct '15	Previous Survey Jul '15	Previous Survey Apr '15
Fitbit (e.g., Flex, Charge)	32%	32%	27%	25%
Microsoft (e.g., Band)	6%	1%	2%	3%
Garmin (e.g., Vivosmart, Vivofit 2)	4%	6%	4%	4%
Samsung (e.g., Gear Fit)	4%	1%	2%	1%
Polar (e.g., A300, Loop 2)	3%	1%	2%	3%
Jawbone (e.g., UP4)	1%	1%	2%	3%
Fitbug (e.g., Orb)	1%	0%	1%	1%
Nike (e.g., Nike+ Fuelband)	0%	2%	2%	1%
Xiaomi (e.g., Mi Band)	0%	2%	1%	1%
HTC (e.g., Grip)	0%	1%	0%	1%
Basis (e.g., Peak)	0%	1%	0%	0%
Timex (e.g., Ironman One GPS+)	0%	1%	NA	NA
Misfit (e.g., Shine, Flash)	0%	0%	0%	1%
LG (e.g., Lifeband Touch)	0%	0%	NA	NA
Withings (e.g., Pulse)	0%	0%	NA	NA
Don't Know/NA	47%	50%	52%	55%
Other	2%	2%	5%	1%

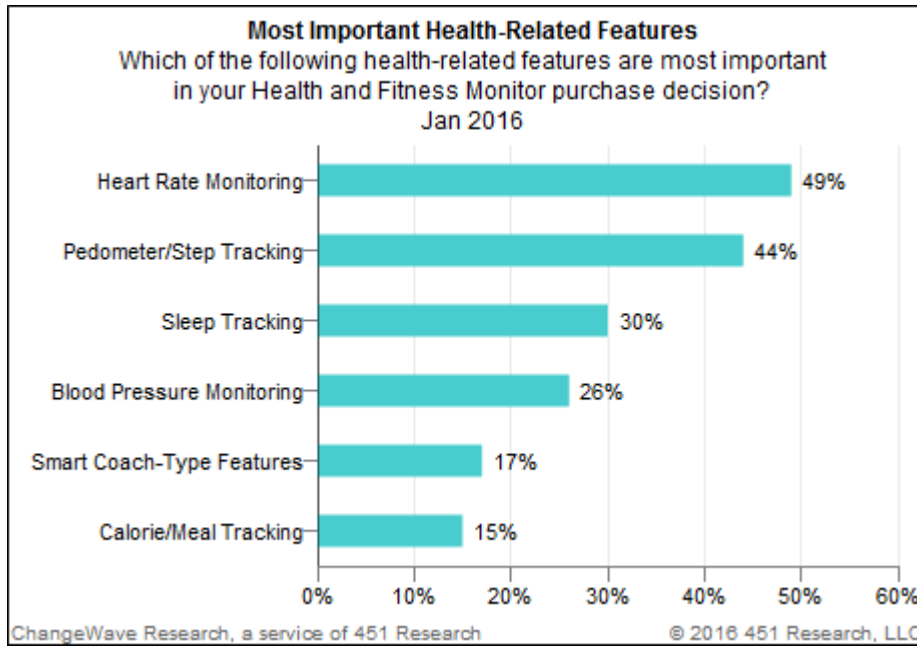
In terms of purchase timeframe, a third (33%) say they’ll buy their device within the next 90 days – an 8-pt drop from previously.

When do you think you'll purchase your new Health and Fitness Monitor?

	Current Survey Jan '16	Previous Survey Oct '15	Previous Survey Jul '15	Previous Survey Apr '15
Within the Next 30 Days	8%	4%	5%	8%
30-60 Days	10%	11%	13%	13%
60-90 Days	15%	26%	16%	18%
3-6 Months	24%	24%	27%	21%
6-12 Months	27%	18%	19%	18%
More Than 12 Months	5%	5%	6%	9%
Don't Know	11%	13%	13%	15%

Key Factors in Health and Fitness Monitor Purchase Decision

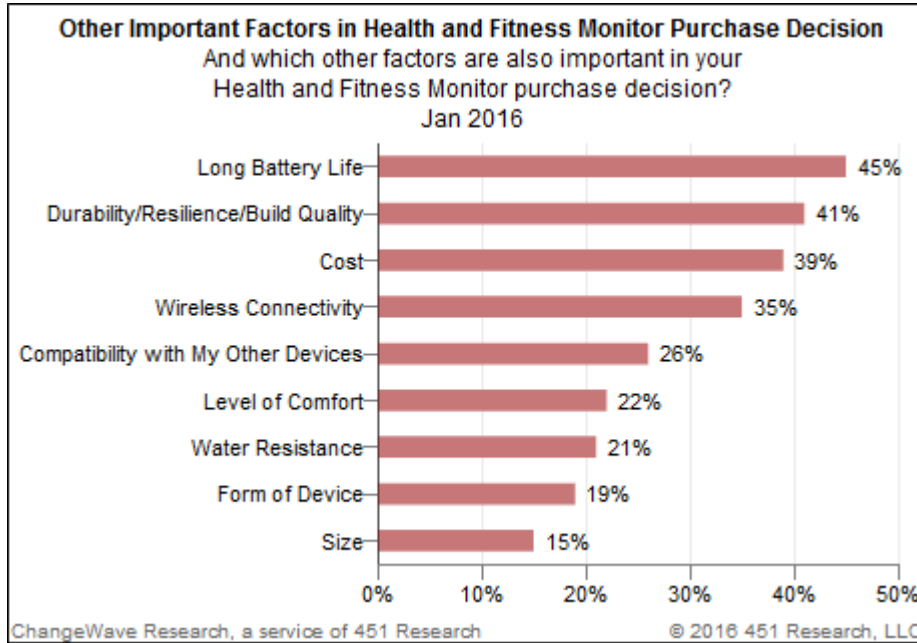
Heart Rate Monitoring (49%) is the top health-related feature that buyers are looking for in a fitness monitor, closely followed by *Pedometer/Step Tracking* (44%). *Sleep Tracking* (30%) and *Blood Pressure Monitoring* (26%) are also important considerations.



Which of the following health-related features are most important in your Health and Fitness Monitor purchase decision? (Choose No More Than Two)

	Current Survey Jan '16
Heart Rate Monitoring	49%
Pedometer/Step Tracking	44%
Sleep Tracking	30%
Blood Pressure Monitoring	26%
Smart Coach-Type Features (e.g., workout analysis tools, real-time voice coaching)	17%
Calorie/Meal Tracking	15%
Weight Tracking	5%
Fitness Challenges with Other Users	3%
Other	1%

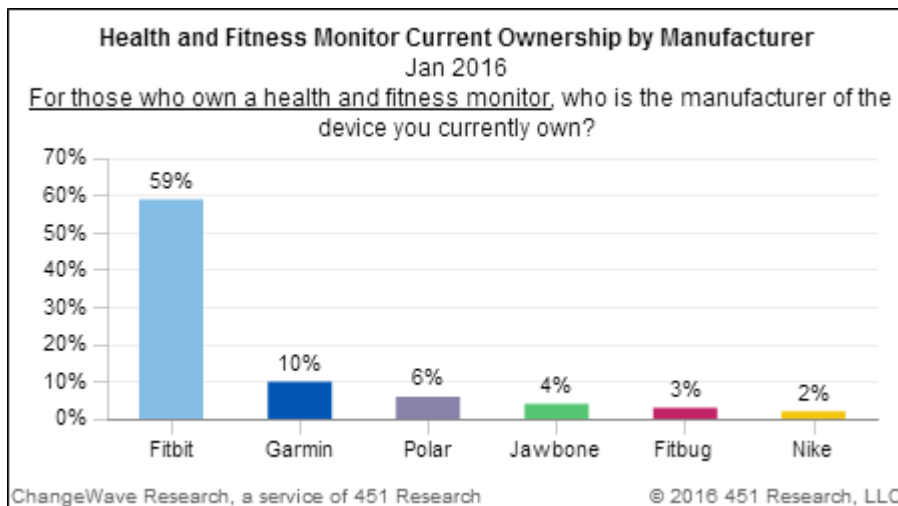
In terms of non-health related factors that consumers cite as being important in their purchase decision, *Long Battery Life* (45%) tops the list, followed by *Durability/Resilience/Build Quality* (41%), *Cost* (39%), and *Wireless Connectivity* (35%).



And which other factors are also most important in your Health and Fitness Monitor purchase decision? (Choose No More Than Three)

	Current Survey Jan '16
Long Battery Life	45%
Durability/Resilience/Build Quality	41%
Cost	39%
Wireless Connectivity (e.g., Bluetooth, Wi-Fi)	35%
Compatibility with My Other Devices	26%
Level of Comfort	22%
Water Resistance	21%
Form of Device (e.g., wrist band, clip-on)	19%
Size	15%
Aesthetics/Design	13%
Dust Resistance	1%
Making Mobile Payments	0%
Other	2%

Among current health and fitness monitor owners, Fitbit (59%) towers over the other manufacturers. Garmin (10%) is a distant second, followed by Polar (6%).



For those who own a Health and Fitness Monitor, who is the manufacturer of the device you currently own?

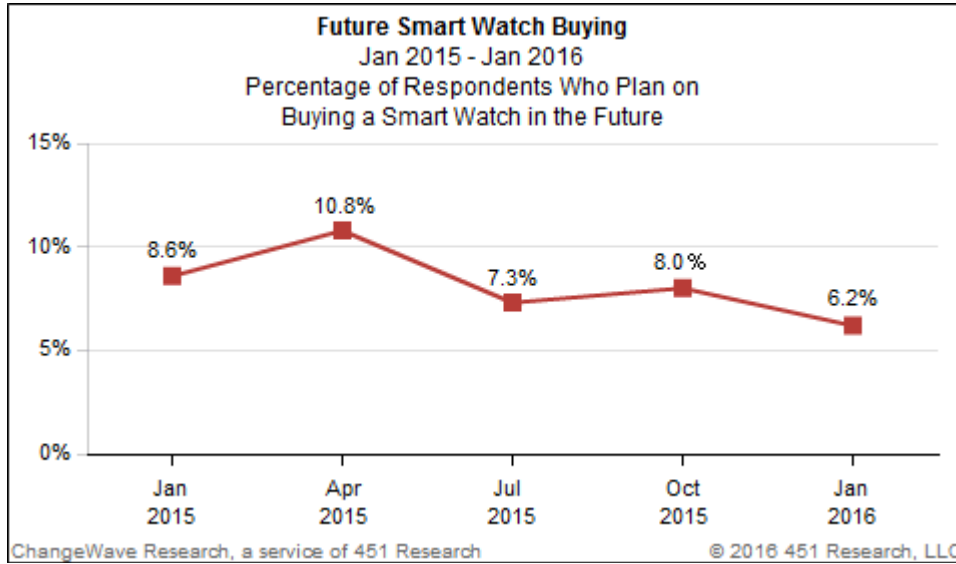
	Current Survey Jan '16	Previous Survey Oct '15	Previous Survey Jul '15	Previous Survey Apr '15
Fitbit (e.g., Flex, Charge)	59%	59%	53%	52%
Garmin (e.g., Vivosmart, Vivofit 2)	10%	8%	11%	9%
Polar (e.g., A300, Loop)	6%	6%	8%	10%
Jawbone (e.g., UP24, UP3)	4%	4%	5%	6%
Fitbug (e.g., Orb)	3%	2%	3%	2%
Nike (e.g., Nike+ Fuelband)	2%	3%	3%	2%
Misfit (e.g., Shine, Flash)	2%	2%	1%	1%
Microsoft (e.g., Band)	2%	1%	1%	1%
Samsung (e.g., Gear Fit)	2%	1%	1%	1%
Other	10%	14%	13%	14%
No Answer	2%	2%	2%	2%

Health & Fitness Monitor Satisfaction. Focusing on customer satisfaction, 33% of Fitbit owners say they're *Very Satisfied* and 49% *Somewhat Satisfied*, which is higher than the satisfaction rating for all other manufacturers combined (33% *Very Satisfied*; 40% *Somewhat*).

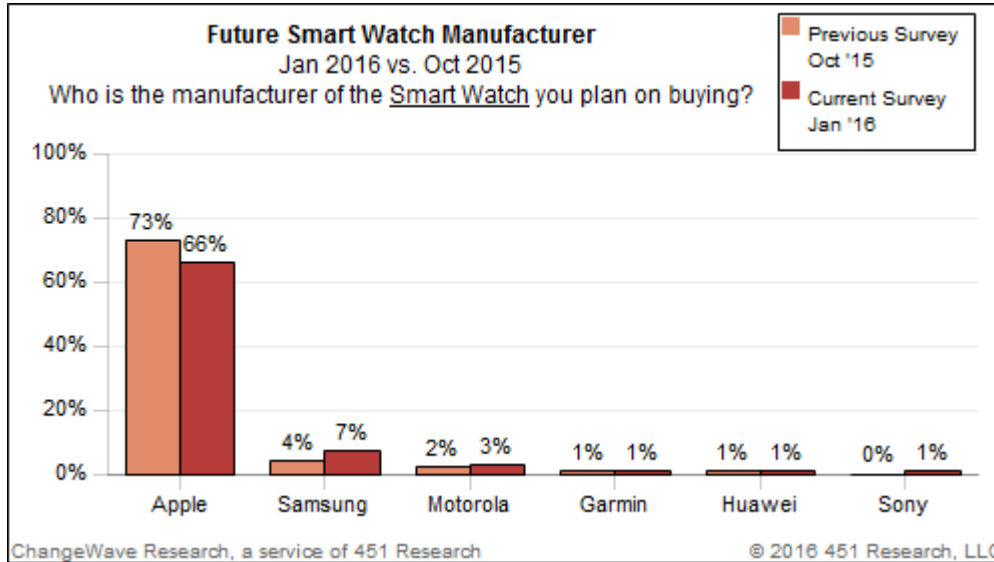
Health & Fitness Monitor Satisfaction Ratings	Fitbit Owners	All Other Health & Fitness Monitor Owners
Very Satisfied	33%	33%
Somewhat Satisfied	49%	40%
Somewhat Unsatisfied	10%	18%
Very Unsatisfied	3%	5%
Don't Know/NA	5%	5%

Apple Remains Leader in Slowing Smart Watch Space

Similar to health and fitness monitors, the results show demand for smart watches slowing, with 6.2% of respondents saying they plan on buying one in the future – down 1.8-pts from the previous survey.



Apple continues to dominate in terms of future demand, with a total of 66% of planned smart watch buyers saying they'll get an Apple Watch – but that's down 7-pts from previously.



The rest of the manufacturers remain far behind, though Samsung (7%) is registering a 3-pt increase and Motorola (3%) is up 1-pt.

Who is the manufacturer of the Smart Watch you plan on buying?

	Current Survey Jan '16	Previous Survey Oct '15	Previous Survey Jul '15	Previous Survey Apr '15
Apple (e.g., Apple Watch)	66%	73%	75%	78%
Samsung (e.g. Gear 2, Gear Live, Gear S2)	7%	4%	3%	2%
Motorola (e.g., Moto 360)	3%	2%	1%	1%
Garmin (e.g., Vivoactive)	1%	1%	1%	0%
Huawei (e.g., Huawei Watch)	1%	1%	1%	0%
Sony (e.g., SmartWatch 3)	1%	0%	3%	1%
LG (e.g., Urbane, G Watch R)	0%	1%	2%	1%
Pebble (e.g., Time, Steel)	0%	1%	1%	2%
Opening Ceremony (e.g., MICA powered by Intel)	0%	0%	0%	0%
Martian (e.g., Voice Command Envoy)	0%	0%	NA	NA
Don't Know/NA	19%	17%	14%	14%
Other	1%	1%	1%	2%

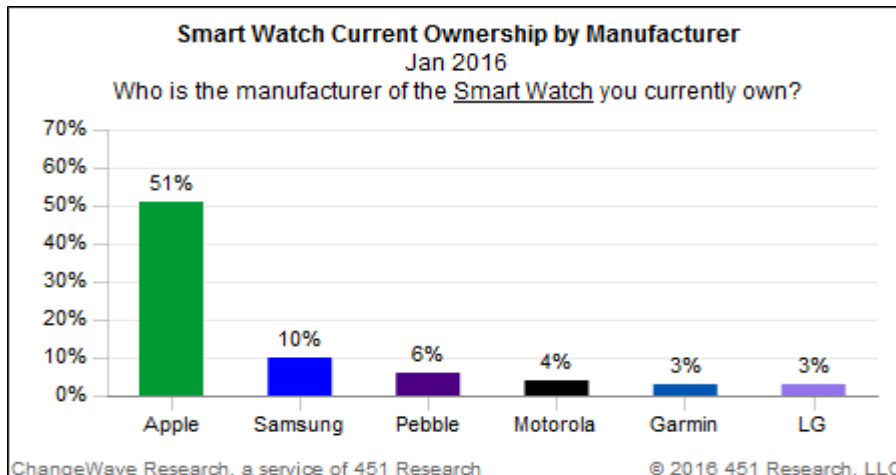
Timeframe for Buying

Just as we saw with health and fitness monitors, the purchase timeframe has relaxed in the aftermath of the holidays, with 18% of planned smart watch buyers saying they'll buy within the next three months – down 6-pts from previously.

When do you think you'll purchase your new Smart Watch?

	Current Survey Jan '16	Previous Survey Oct '15	Previous Survey Jul '15
Within the Next 30 Days	4%	2%	2%
30-60 Days	4%	5%	5%
60-90 Days	10%	17%	14%
3-6 Months	21%	20%	18%
6-12 Months	38%	33%	29%
More Than 12 Months	14%	10%	19%
Don't Know	9%	11%	13%

Turning to smart watch owners, Apple continues to dominate with 51% saying they own an Apple Watch. Another 10% say they own a Samsung smart watch and 6% Pebble.



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For those who own a Smart Watch, who is the manufacturer of the device you currently own?

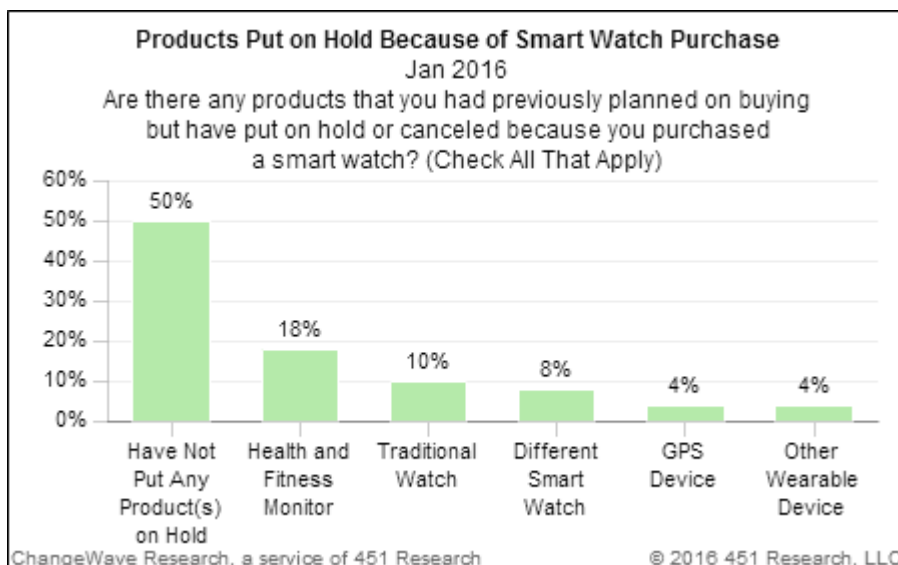
	Current Survey Jan '16	Previous Survey Oct '15	Previous Survey Jul '15
Apple (e.g., Apple Watch)	51%	51%	54%
Samsung (e.g. Galaxy Gear, Gear Live, Gear S)	10%	9%	13%
Pebble (e.g., Time, Steel)	6%	8%	3%
Motorola (e.g., Moto 360)	4%	5%	4%
Garmin (e.g., Vivoactive)	3%	5%	3%
LG (e.g., Urbane, G Watch)	3%	3%	2%
Other	11%	7%	10%
No Answer	10%	13%	9%

Smart Watch Satisfaction. Apple outperforms in smart watch customer satisfaction, with nearly three-in-five (57%) Apple Watch owners saying they're *Very Satisfied* – double the rating among all other smart watch owners (29%).

Smart Watch Satisfaction Ratings	Apple Watch Owners	All Other Smart Watch Owners
Very Satisfied	57%	29%
Somewhat Satisfied	37%	49%
Somewhat Unsatisfied	5%	14%
Very Unsatisfied	2%	5%
Don't Know/NA	0%	4%

Products Put On Hold. We asked current smart watch owners if there are any purchases they had put on hold or cancelled because they had bought a smart watch.

While half (50%) of this group say they haven't put any products on hold, 18% say they're putting off buying a health and fitness monitor, and 10% a traditional watch.



Looking at the following list of products, are there any that you had previously planned on buying but have put on hold or canceled because you purchased a smart watch? (Check All That Apply)

	Current Survey Jan '16
Have Not Put Any Product(s) on Hold	50%
Health and Fitness Monitor	18%
Traditional Watch	10%
A Different Smart Watch	8%
GPS Device	4%
Other Wearable Device	4%
Other	1%

Blurring Lines – Smart Watches and Health & Fitness Monitors

The line between the two leading types of wearable devices continue to blur, as manufacturers are launching hybrid devices that combine features of both.

Fitbit recently announced such a device – the Blaze smart fitness watch – which will be released in March. Features include a color touch screen, heart rate monitoring, call and text notifications, and calendar alerts. The Fitbit Blaze will have several band styles and starts at \$199.

We asked all respondents if they are likely to purchase a Fitbit Blaze smart fitness watch in the future, and 7% say they are likely (1% *Very Likely*; 6% *Somewhat Likely*).

How likely is it that you will buy a Fitbit Blaze smart fitness watch for yourself or someone else (e.g., a family member) in the future?

	Current Survey Jan '16
Very Likely	1%
Somewhat Likely	6%
Unlikely	77%
Already Preordered Fitbit Blaze Smart Fitness Watch	0%
Don't Know	16%

Not surprisingly, likelihood among planned wearable tech buyers is significantly higher (3% *Very Likely*; 22% *Somewhat Likely*).

	Planned Overall Wearable Technology Buyers
Very Likely	3%
Somewhat Likely	22%
Unlikely	52%
Already Preordered Fitbit Blaze Smart Fitness Watch	0%
Don't Know	22%

Among those interested in buying the Blaze, 27% expect to use it equally as both a health and fitness monitor and a smart watch – an indication that buyers would leverage the features of both types of wearables. At the same time, nearly half (47%) say they will primarily use it as a health and fitness monitor, while 15% say primarily as a smart watch.

Which of the following best describes how you expect to primarily use the Fitbit Blaze?

	Current Survey Jan '16
Use Primarily as a Health and Fitness Monitor	47%
Use Primarily as a Smart Watch	15%
Equally as Both	27%
Don't Know	12%

Frequency of Use – Health & Fitness Monitors vs. Smart Watches

We also asked wearable owners who have had their device for at least three months how often they plan on using it going forward.

One-in-ten (10%) health and fitness monitor owners say they'll use their device *More Often* over the next 90 days compared to the previous 90 days vs. 11% *Less Often*. In terms of smart watch owners, 18% say they'll use their device *More Often* vs. 14% *Less Often*.

For those who have owned a health and fitness monitor or smart watch for at least 3 months, do you plan on using your device more often over the next 90 days, less often, or about the same compared to the previous 90 days?

	Health & Fitness Monitor Owners	Smart Watch Owners
More Often	10%	18%
About the Same	79%	68%
Less Often	11%	14%

ChangeWave Research Methodology

This report presents the findings of a January 4-18, 2016 ChangeWave consumer survey on wearable technology trends. A total of 2,381 consumers participated in the survey.

ChangeWave's proprietary research and business intelligence gathering system is based upon the systematic gathering of valuable business and investment information directly over the Internet from accredited members of its research network.

The business and investment intelligence provided by ChangeWave provides a real-time view of companies, technologies, and consumer and business trends in key market sectors, along with an in-depth perspective of the macro economy – well in advance of other available sources.

About ChangeWave Research

ChangeWave Research, a service of 451 Research, is a survey research firm that identifies and quantifies change in corporate buying & business trends, telecom trends, and consumer spending & electronics trends.

The ChangeWave Research Network is a group of 25,000 highly qualified business, technology, and medical professionals – as well as early adopter consumers – who work in leading companies of select industries. ChangeWave surveys its Network members weekly on a range of business and consumer topics, and converts the information into a series of proprietary quantitative and qualitative reports.

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