



**Consumer
Technology
Association™**

ARE YOU CES READY?

Nov. 8 | New York, NY | CES.tech | #CESUnveiledNY



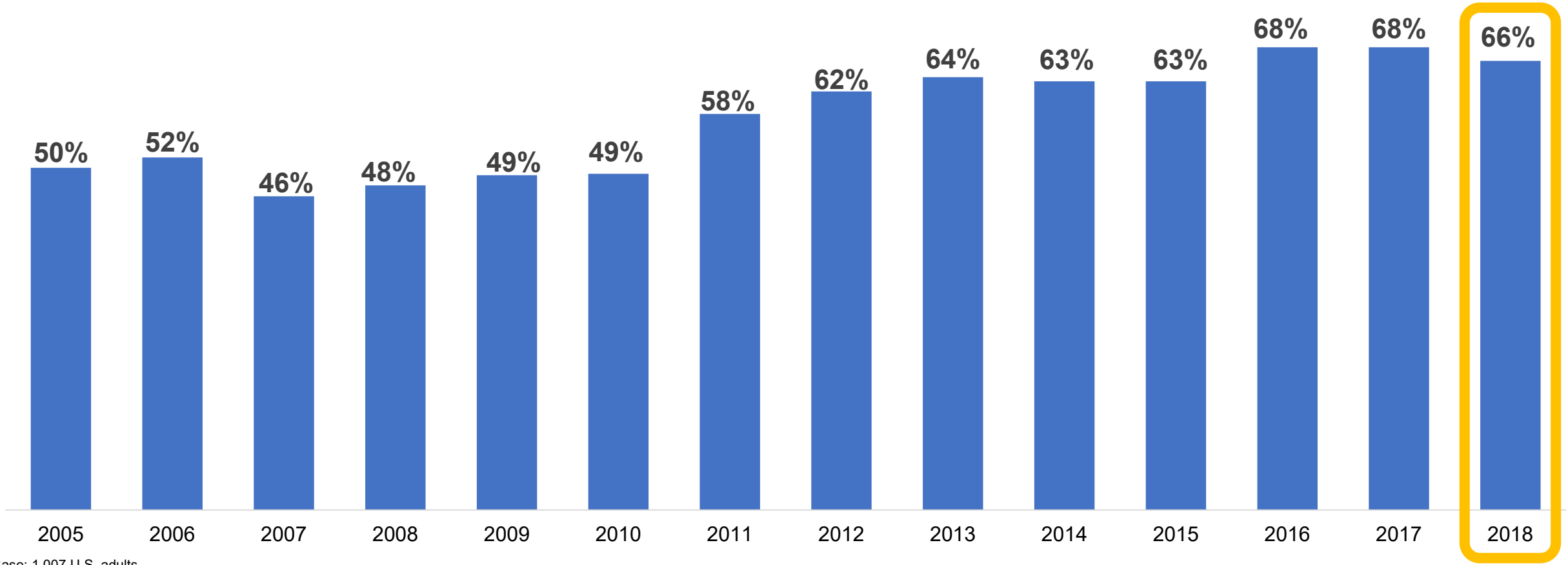
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JAN. 8-11 | **CES.tech** | **#CES2019**

164 Million U.S. Adults Plan to Purchase Tech Gifts, Spending an Average of \$464



Unveiled New York



Base: 1,007 U.S. adults

Q: Do you expect to purchase any type of **electronics** product as a gift this holiday season for...

Q: You indicated you plan to spend at least some money on gifts this holiday season. Please tell me the **total** amount you will spend on consumer electronics products. (Base = plan to spend money for holiday gifts this year)

Source: CTA, Annual Holiday Research, Nov. 2018

*Base: US adults

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Similar to 2017...



Unveiled New York

Focus on Voice Devices



Large Category Success



Omni Shipping



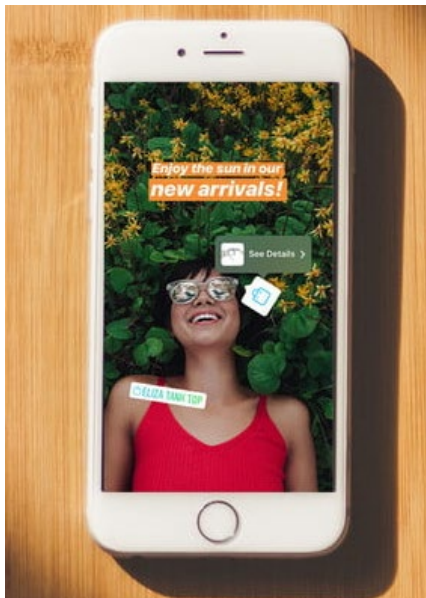
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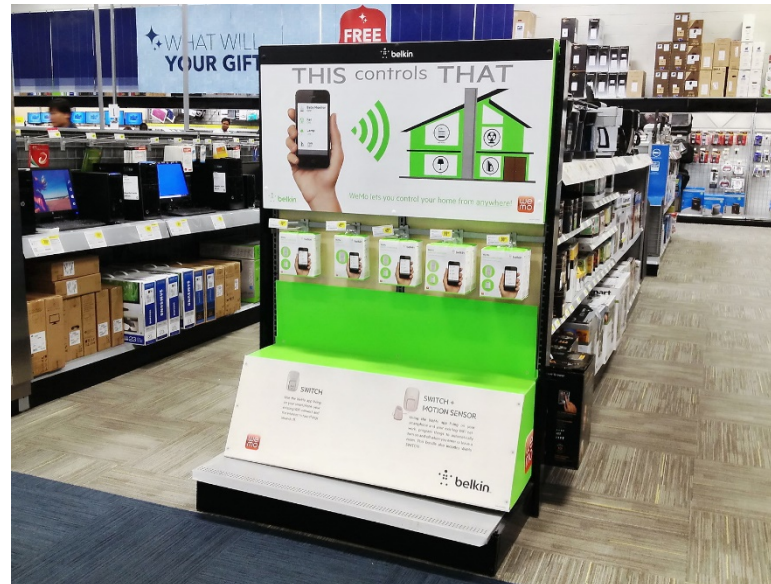
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New in 2018...

Curated Social Buying



Emerging Categories Ready for Primetime



Concierge Services



2018 Holiday Consumer Tech Gift Wish List

(Adult Top 5)

1



TV
(2017: #1*)

2



**Notebook/
Laptop**
(2017: #1*)

3



Smartphone
(2017: #2)



Tablet
(2017: #4)

4



Smartwatch
(2017: #5*)

5



Desktop Computer
(2017: Not in Top Five)



Any Type of Camera
(2017: #5*)

*Indicates Product Tie in 2017

Base: 1,007 U.S. adults

Q: Suppose you could receive any **one electronics** product as a gift this holiday season. What **electronics** product would you, yourself, **most** like to receive?

Source: CTA, Annual Holiday Research, Nov. 2018

*Base: US adults

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Thanksgiving Week: Trends Revealed



Unveiled New York

85% of U.S. Shoppers Plan to Buy Tech This Thanksgiving Week

(n=1045 U.S. Adults Planning to Shop for Holiday Gifts during Thanksgiving week)



Most Popular Shopping Times

- Black Friday (37%)
- Cyber Monday (33%)
- December (45%)

BASE (n=Total U.S. Adults)



When do shoppers make big ticket tech purchases?

- 46% when they see a deal any time of the year
- 31% wait until Thanksgiving weekend

BASE (n=1563 U.S. Adults Planning to Shop for Holiday Gifts This Season)



“Tis’ the Week to Self-Gift Tech”

- 33% of holiday shoppers more likely to buy tech devices for themselves than anyone else.
- 41% of holiday shoppers plan to buy tech accessories for a family member

(n=1045 U.S. Adults Planning to Shop for Holiday Gifts during Thanksgiving week)



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Source: CTA, Pre-Black Friday Research, Nov. 2018

*Base: US adults

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Holiday Tech Spending Forecast



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October–December Spending in Millions

2016



(actual spend)

\$95,870

3.8%

2017



(actual spend)

\$93,000

-3.0%

2018



(*estimated* spend)

\$96,100

3.4%

CES 2019 Tech Trends



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Strategic Perspective on Tech Trends



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Digital Age

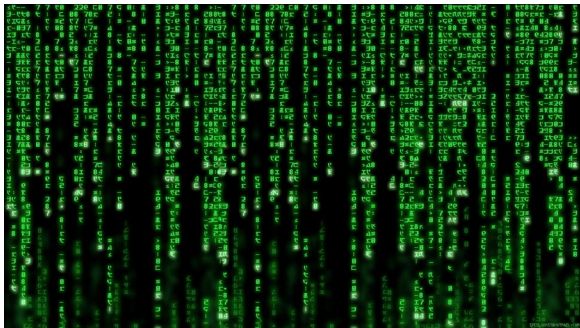


Connected Age



NETFLIX

Data Age



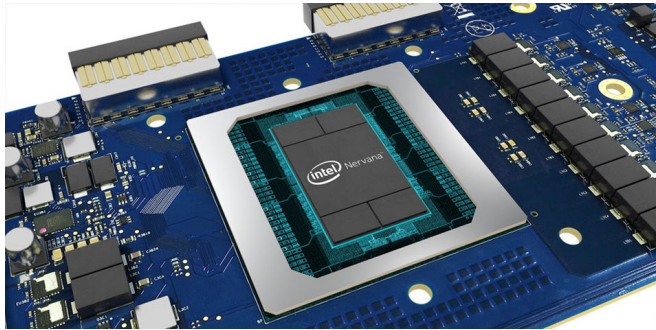
Artificial Intelligence at CES 2019

The New IoT: The Intelligence of Things



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Processors and Chips



Embedded A.I.



Machine-Learning



Digital Assistants



amazon alexa



works with the
Google Assistant

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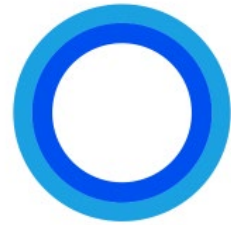
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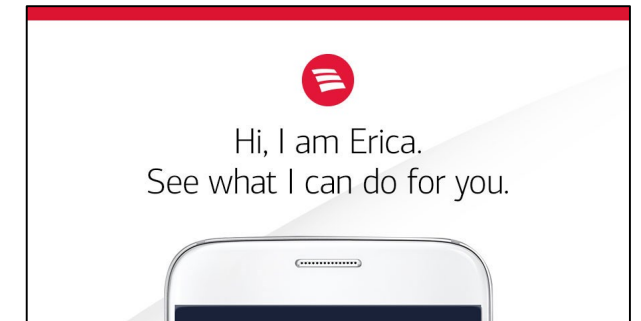
Digital Assistants Become More Specialized



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Hi. I'm Cortana.

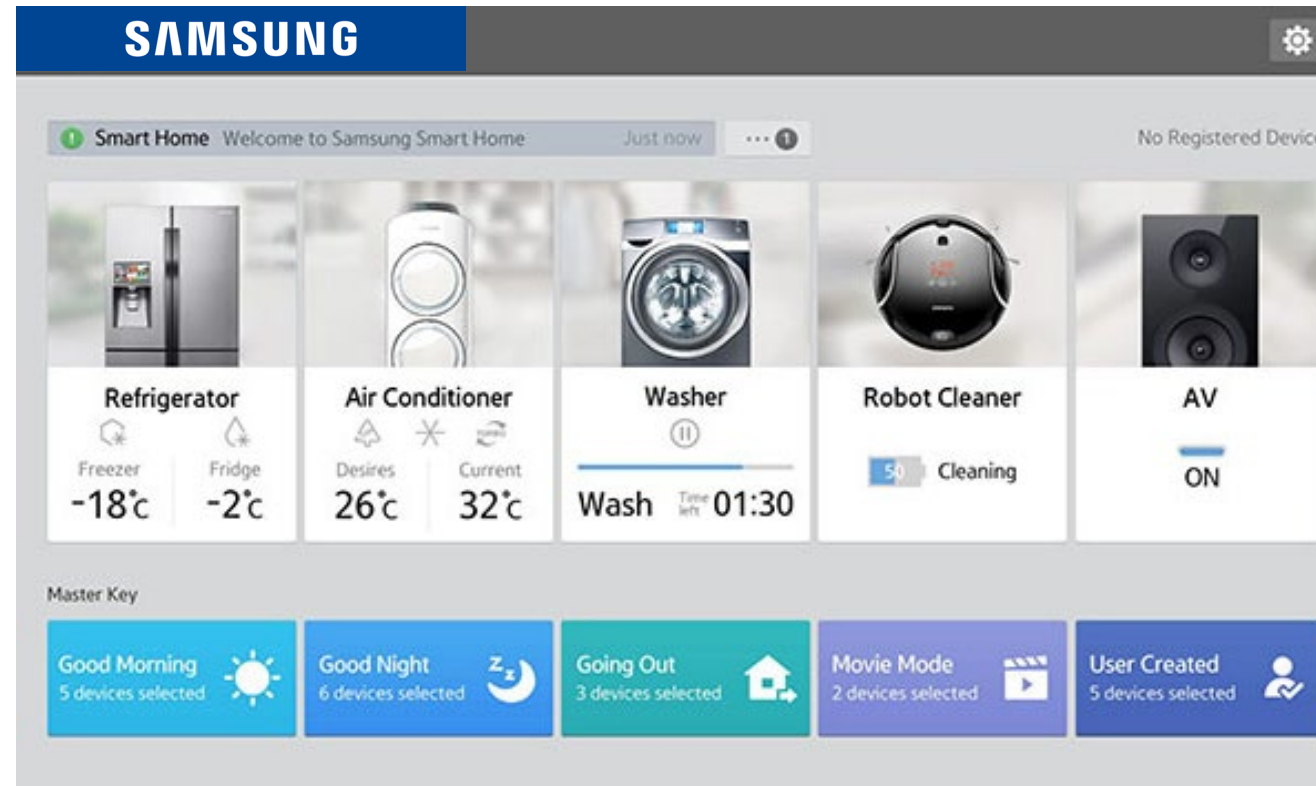
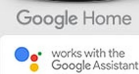


LG ThinQ[®]

A Whole Home View on AI



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Digital Assistants: Shifting Consumer Behavior



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Most Common Activities

	% Used
Ask questions (general Internet search)	63
Check the weather	58
Listen to music/radio/podcasts	50
Set a timer or alarm	45
Call someone	32

Less Common Activities

	% Used
Researched products and/or prices of products	20
Control other connected devices	16
Play games	13
Order food	11
Order a taxi/rideshare (i.e., Uber, Lyft)	7



Source: CTA, Voice Shopping Study, August 2018
*Base: Online US Adults, Digital Assistant Users

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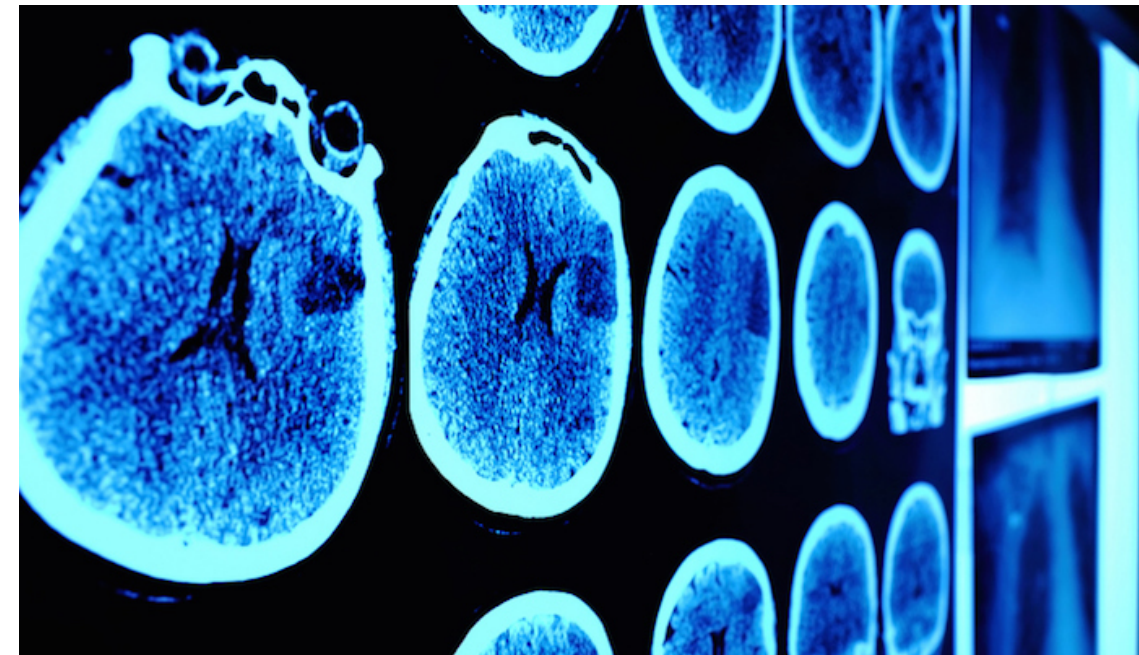
AI: From Face ID to Cancer Detection



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Face ID



Lymph Node Assistant (LYNA)

Google's deep learning tool can detect breast cancer with 99% certainty

5G

Next Gen Mobile: More Than Phones



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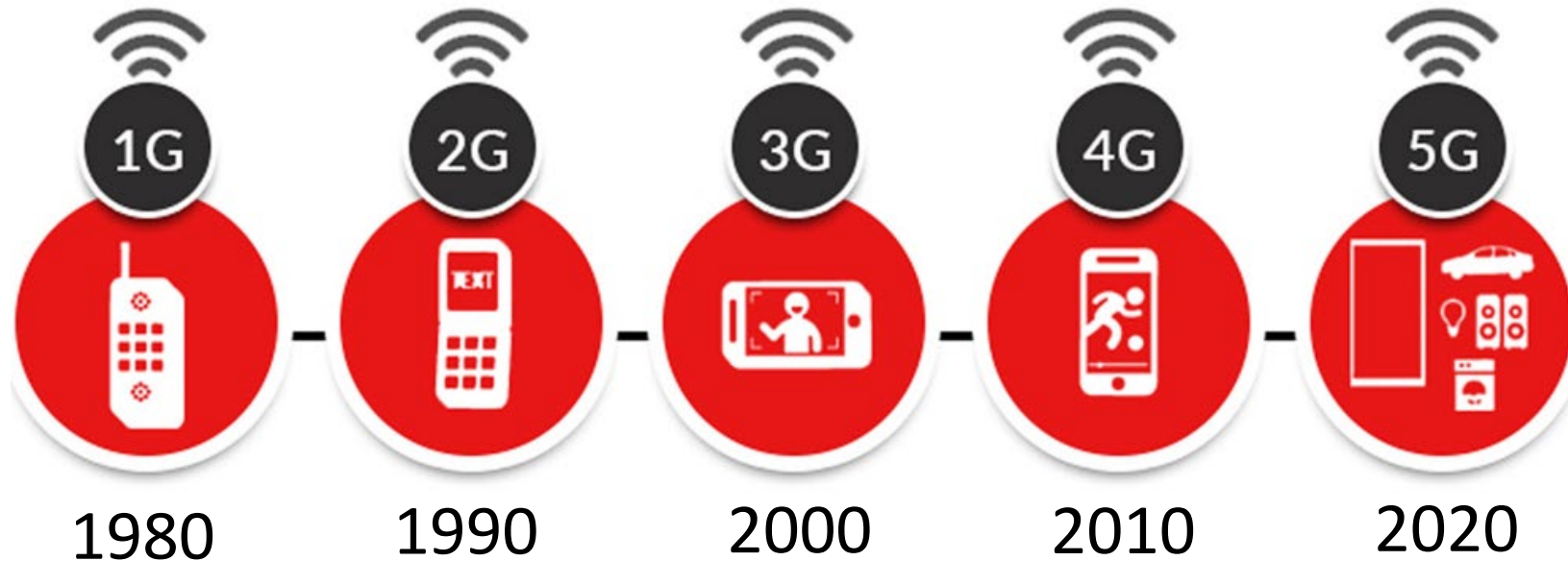


We spent the last 30 years connecting **people**.
We will spend the next 30 years connecting **things**.



Brian Modoff, EVP, Qualcomm

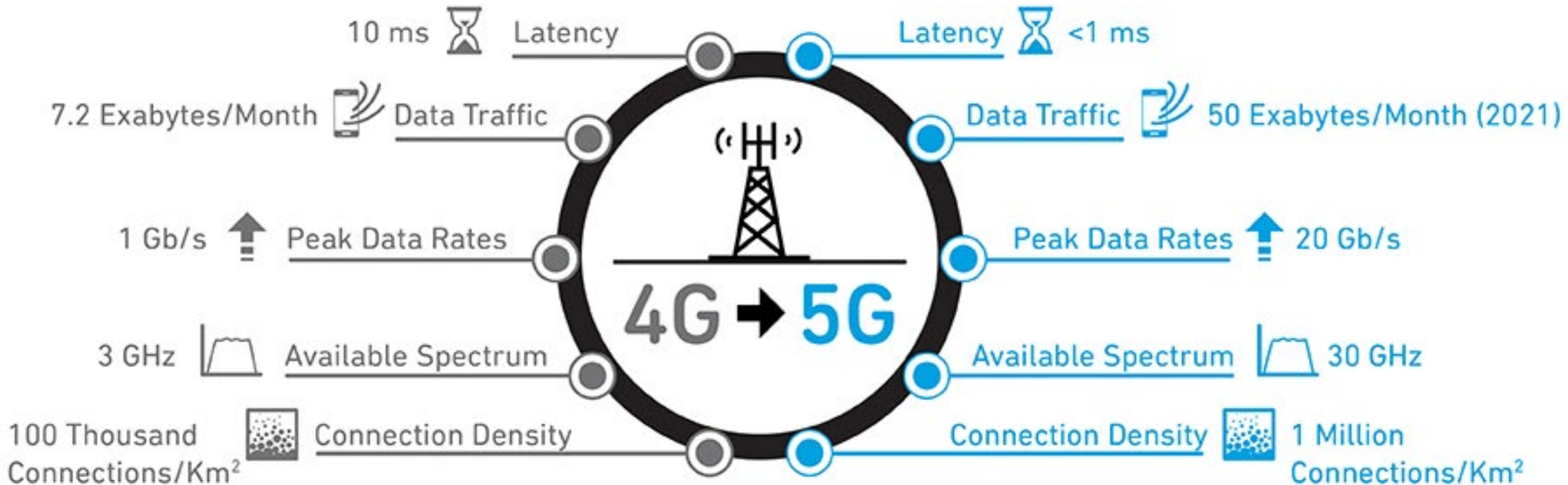
Source: The San Diego Tribune



5G Advantages Over 4G



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Verizon to Roll Out 5G Home Service



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Vehicle Tech Trends To Watch

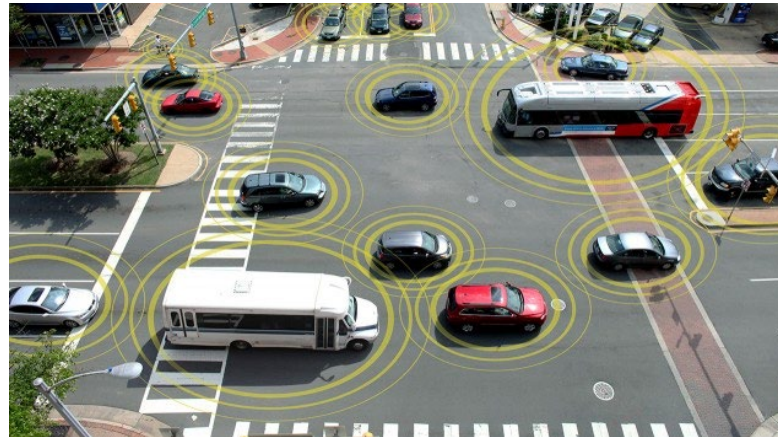


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Future of Mobility



V2X Communications



Electric Vehicles



The Road to Self-Driving Vehicles



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Billions of Dollars ... Millions of Miles

Major Investments in Self-Driving Technologies



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- Ford \$1 billion investment in Argo AI
- Toyota \$1 billion investment in Toyota Research Institute
- GM \$581 million to acquire self-driving car start-up, Cruise Automation
- GM \$500 million investment in Lyft
- Volvo \$300 million JV with Uber
- Uber \$680 million to purchase Otto
- Intel \$15.3 billion to buy Mobileye
- Hyundai \$1.7 billion in R&D



John Deere & The Farming of the Future



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According to recent CTA research, 56% of U.S. adults have a favorable view of self-driving tractors for agricultural activities

Source: CTA, Self-Driving Vehicles, October 2018

*Base: Online US adults

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Smart Cities: A Symphony of Technologies



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Ingredient Technologies

Voice Computing

Robotics

5G

Biometrics

Blockchain

Artificial Intelligence

Digital
Privacy/Security

In the Market

Digital Assistants

Smart Home

Vehicle Tech

Sensor Technology

Resilient Technologies

Resilient Technologies at CES 2019



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Disaster Recovery

Cyber Resilience



Emergency Preparedness



Public Alert Systems



Anti-Terrorism



Consumer Devices



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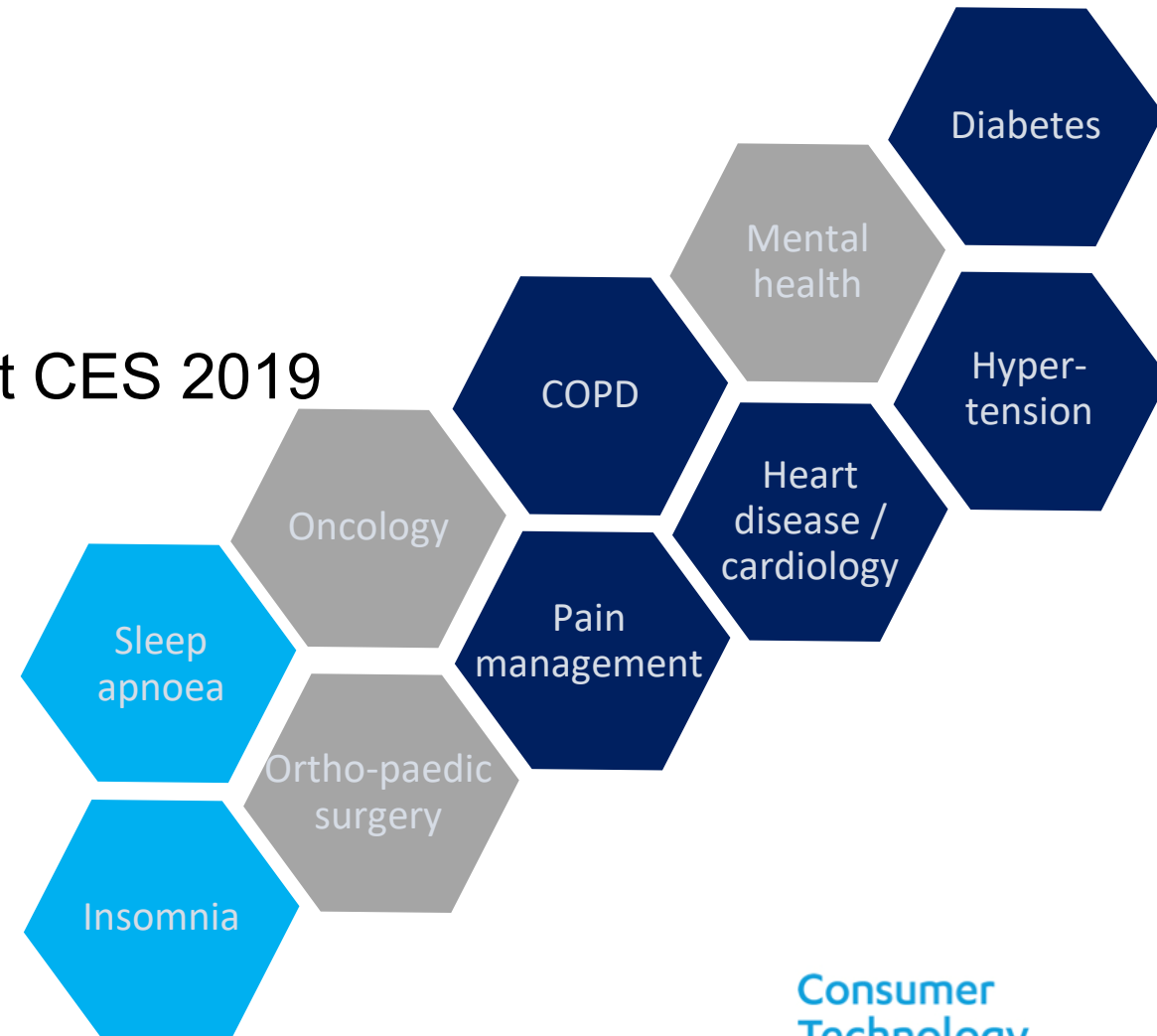
Digital Therapeutics

Harnessing Technology to Impact Health

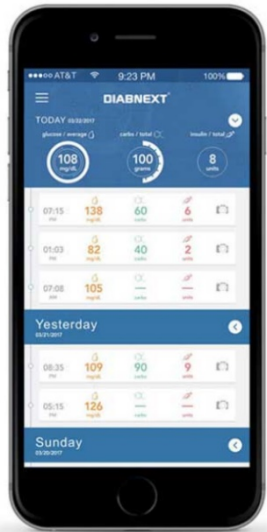
- Enhancing traditional medical practices
- Encouraging behavioral change
- Serve as stand-alone direct therapy
- **NEW** Accredited CME Program Launching at CES 2019



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CES 2019 Tech Trends

Ben Arnold, Senior Director – Innovation & Trends
Lesley Rohrbaugh, Director – Market Research



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