IDC at CES 2019

Connecting Life to an Evolving Device Landscape

Wednesday, January 9
Waldorf Astoria (Ballroom A&B)
Las Vegas, NV

7:15-7:45 am
Registration

7:45-8:25 am
Breakfast Roundtables (arrive early to ensure a seat at your preferred table)

Table 1	Table 2	Table 3
Future of Silicon *Mario Morales*	**Smart Assistants/Connected Home** *Adam Wright*	**Consumer Engagement** *John Jackson*
Table 4	Table 5	Table 6
Connected Vehicle *Matt Arcaro, Jeff Hojlo*	**Wearables** *Ramon Llamas, Jitesh Ubrani*	**Augmented Reality/Virtual Reality** *Tom Mainelli*
Table 7	Table 8	Table 9
PCs/Tablets and Smartphones *Linn Huang, Lauren Guenveur*	**Consumer Digital Transformation (DX)** *Greg Ireland*	**IoT and 5G** *Carrie MacGillivray, Jason Leigh*

8:25-8:30 am
Welcome and Opening Remarks
Tom Mainelli, Program Vice President, Devices & AR/VR

8:30-8:55 am
Smartwatches: Disrupting the Way You Live and Work – and Everything in Between
Ramon Llamas, Research Director, Mobile Devices and AR/VR
Remember when the first smartwatches came out? They only operated as extensions of your smartphone, capable of simple fitness tracking and even simpler notifications. Today's smartwatches make those first-generation smartwatches look quaint, providing glanceable and actionable information, communicating with other users and systems, and detecting deeper symptoms indicative of larger health issues. In the process, they've also become the valuable endpoint for users to remain connected to the people and the information that matter to them most. Where is the market heading next? IDC's Ramon T. Llamas looks at the next evolutionary steps for the smartwatch market, what questions they will raise for multiple players along the ecosystem, and how vendors can capture demand in the years to come.

8:55-9:20 am
Connected Vehicles: A Data-Driven Revolution
Matt Arcaro, Research Manager, Next Generation Automotive
The original model that focused solely on the manufacturing and sale of vehicles is becoming unsustainable. Instead, these vehicle manufacturers and suppliers are counting on the development of digital services to propel their future growth. The execution of this strategy may already be paying off for some as vehicle buyers are increasingly prioritizing the technology in the car over its on-road performance. In his presentation, Matt Arcaro will provide an overview of the challenges and opportunities for the vendors pursuing these connected and automated vehicle opportunities. He will also review survey data highlighting how current vehicle owners view adoption and use of connected and automated services.

9:20-9:45 am
Smart Assistants: The Rising Cornerstone of Consumer IoT
Adam Wright, Senior Research Analyst, Internet of Things: Consumer
The smart assistant market has evolved rapidly in the past two years with a multitude of new products, platform capabilities, services, and partnerships. Recent developments from Amazon, Google, Samsung, and others have underscored the dynamic nature of this fast-moving market and show that the competitive landscape is shifting as new lines of differentiation are forming not only around product features but also around broader ecosystems of devices, services, and partnerships. In this presentation, Adam Wright will discuss the emerging developments in this fast-moving market and explore how smart assistants are quickly cementing their place as the cornerstone of the consumer Internet of Things ecosystem.

9:45-10:10 am
Personal Computing Devices: Their Future is In the Hands of Users
Linn Huang, Research Director, Devices and Displays
Lauren Guenveur, Senior Research Analyst, Devices and Displays
The PC industry has transformed, led by consumers changing the way they use devices daily. Once the center of the personal computing experience, the PC has watched a generation of users move from dial-up internet to being constantly connected through a variety of devices including smartphones, tablets, and yes, even wearables. The next generation of users, already born, likely started using an internet device that was not a PC. Yet, the PC remains an integral part of a consumer's usage experience, in one form or another, as gamers, creators, coders, and others continue to discover unique capabilities that place this form factor apart from others. In this session, Lauren Guenveur outlines the way forward as millennials come of age and generation Z moves to the forefront of future strategies. How does their user experience shape the PC industry of tomorrow? How has it already changed for users today?