PRIME RESEARCH CISION

Cision Insights

Global Show Trends | CES 2019

FINAL REPORT - January 22, 2019

Methodology & Analysis scope

Cision Insights conducted its annual CES Las Vegas Study, designed to identify emerging trends and audiences from expanding coverage and conversations aligned to the show. Mining more than 475K articles and posts from online news outlets, blogs and social channels, the study covers technology industry discussions from 188 markets around the globe.

Reflecting the growing interest in consumer and enterprise technology, the study analyzed both consumer commentary and news-driven coverage and conversations to identify evolving developments, top brands and general enterprise visibility.

UNIVERSE
All posts and articles with references to the CES Las Vegas

TIMEFRAME
CES 2019: 1.01.2019 - 1.13.2019
Impact: 1.01.2019 – 1.16.2019

MEDIA SCOPE
Traditional: + 75k Online News, Blogs
Social: Twitter, Facebook, Instagram, YouTube

DATA SOURCES
Markets: Global (188 markets)
Providers: Cision Insights / PRIME Research

IMPACT MEASUREMENT
Cision proprietary technology to generate audience insights by tracking engagement, behavioral activity through the sales funnel
In this study: Focus on US online articles, measuring international audience

CES 2019
Business as usual while searching for the next big thing

- **2019 CES GENERATED STABLE MEDIA VISIBILITY VERSUS 2018** Mainstream consumer-tech attracted the biggest audience and contributed as the main driver of audience reach. Opportunities for greater *target audience reach* through more focused media segmentation

- **TOPICAL CONSISTENCY WHEN COMPARED TO 2018** Major topics held steady when compared to previous years: G5, IoT, AI, robotics, future mobility and entertainment – CES remains the perfect place to showcase technology and electronics of any kind. However, anyone hoping for the "next big thing" was disappointed. The company or brand who delivers will enjoy enormous advantages.

- **TECH-GIANTS CLEARLY LEAD CES COVERAGE** Google and Amazon continue their battle over voice assistants as they integrate into the mainstream with everything from cars to refrigerators. Apple made a considerable impact with out investing heavily in the show. And Samsung and LG leveraged the CES to showcase their future, new products and partnerships

- **POTENTIAL GROWTH THROUGH DIVERSITY** Audience analysis shows that CES media coverage skews toward a larger and more homogeneous male audience when compared to similar events, even car shows. Very few topics attracted female readers, principally those featuring design & manufacturing trends. Lifestyle-media attract female readers with their CES coverage and lifestyle-websites attracted a younger CES audience – in total contrast to general news media. Opportunities for an expanded audience may be achieved by broadening focus to female audiences (without sacrificing the existing male audience)

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	LOCATION	LAS VEGAS, USA
	VENUE	LAS VEGAS CONVENTION AND WORLD TRADE CENTER
	CATEGORY	TECH
	PERIOD	ANNUAL
	TIMING	JANUARY
	FOUNDING YEAR	1900
M²	EXHIBITION SPACE	255.000 SQM
	HOMEPAGE	CES.TECH
	FACEBOOK	CES 258SK FANS
	TWITTER	@CES 295K FOLLOWERS
	INSTAGRAM	CES 128K FOLLOWERS
	YOUTUBE	CES 40K SUBSCR.

CES 2019

Connected home innovations attract the biggest audience

✓ **STABLE**
✓ **MEDIA VISIBILITY:**
 CES maintains high level of media visibility compared to 2018

✓ **CONNECTED ECOSYSTEMS AND HYPER-PERSONALIZATION:**
 The smart home enters the mainstream as the major topic of the 2019 CES

Chart (media visibility)

-3%

	CES 2018	CES 2019
Value	1,217 m	1,176 m

Y-axis: 0m, 200m, 400m, 600m, 800m, 1,000m, 1,200m, 1,400m

Topic breakdown (donut chart)
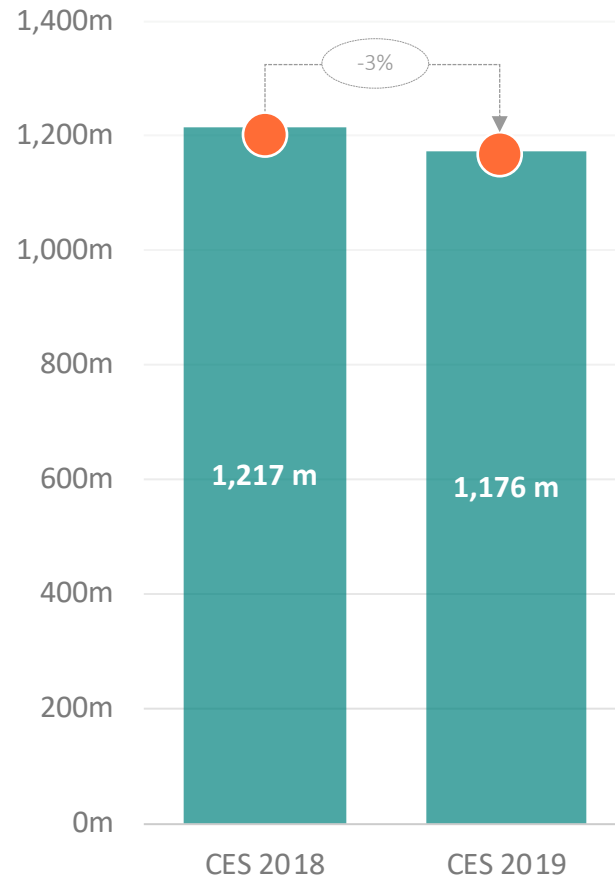
- Home + Family **35%**
- Entertainment + Advertising **20%**
- Health + Wellness **20%**
- Robotics + Machine Intelligence **10%**
- Automotive **8%**
- 5G & Internet of Things **4%**
- Immersive entertainment **3%**
- Product Design + Manufacturing, E-Sports + Blockchain remain niche-topics

Tech giants dominated the CES

✓ **REWARD AND RISK:**
Samsung cooperation and guerilla marketing "What happens on your iPhone…" help Apple score at CES – without officially participating in the show

✓ **AI ENTERED THE MAINSTREAM AND DROVE IMPACT:** The virtual assistants of Google, Samsung (Bixby) and Amazon (Alexa) integrate with everything from cars to the kitchen. Positioned as transcendent, friction-free and intuitive. They became one of the main topics of the show

Company	Topic
GOOGLE	▶ AI-ASSISTANT
SAMSUNG	▶ COOPERATION WITH APPLE (SMART-TV WITH ITUNES AND AIRPLAY2), SMARTER BIXBY
APPLE	▶ COOPERATION WITH SAMSUNG, TABLET GALAXY TABPRO S, MEGA-TV 8K
AMAZON	▶ ALEXA
LG	▶ ROLLABLE SMART-TV
AUDI	▶ VR HOLORIDE, E-TRON, IMMERSIVE IN-CAR ENTERTAINMENT
MERCEDES	▶ WORLD PREMIERE CLA, EQC, URBANETIC
BMW	▶ I.NEXT, AUTONOMOUS DRIVING MOTORCYCLE
SONY	▶ MEGA-TV 8K, MUSIC- AND MOVIE-NEWS
HYUNDAI	▶ CONCEPT ELEVATE
INTEL	▶ 5G
FACEBOOK	▶ DATA SECURITY, FAKE NEWS
MICROSOFT	▶ PASSIVE MENTIONS
NVIDIA	▶ GAMING, DRIVE AUTOPILOT
TOYOTA	▶ ASSISTANT SYSTEM GUARDIAN
FORD	▶ VEHICLE2X WITH QUALCOMM
NISSAN	▶ LEAF
BYTON	▶ M-BYTE AND SERIES PRODUCTION ANNOUNCEMENTS
QUALCOMM	▶ 5G, VEHICLE2X WITH FORD, AI
BOSCH	▶ CONCEPT-SHUTTLE, CONNECTIVITY OF SMART THINGS AND SENSORS

Top 20

100% = Top 20

0%   5%   10%

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Universe
Posts and articles with references to the CES Las Vegas

Period
CES 2019: 01.01.2019 - 13.01.2019
5 days before and 5 days after the first press day of each show

Markets
Global

Media
Traditional & Social

Universe
Posts and articles with automotive references to the CES Las Vegas

Demographic Balance: Gender Imbalance
CES could attract more women

Male **65%**   CES   Female **35%**

✗ Overall, the CES audience for media consumption skewed toward men

✓ Lifestyle media pose a major opportunity to reach a wider female CES audience

✓ Assuming gender balance is an opportunity for growth, CES could leverage content to the media which appeal more towards women

GENERAL NEWS

MALE **64%** ✗ FEMALE **36%**

LIFESTYLE MEDIA

MALE **51%** ✓ FEMALE **49%**

TECH/GAMING MEDIA

MALE **65%** ✗ FEMALE **35%**

BENCHMARK: Ø US GENDER RATIO

MALE **49%**   FEMALE **51%**

BENCHMARK: 2018 LA AUTOSHOW

MALE **68%**   FEMALE **32%**

Topics Attract Men But Not Women
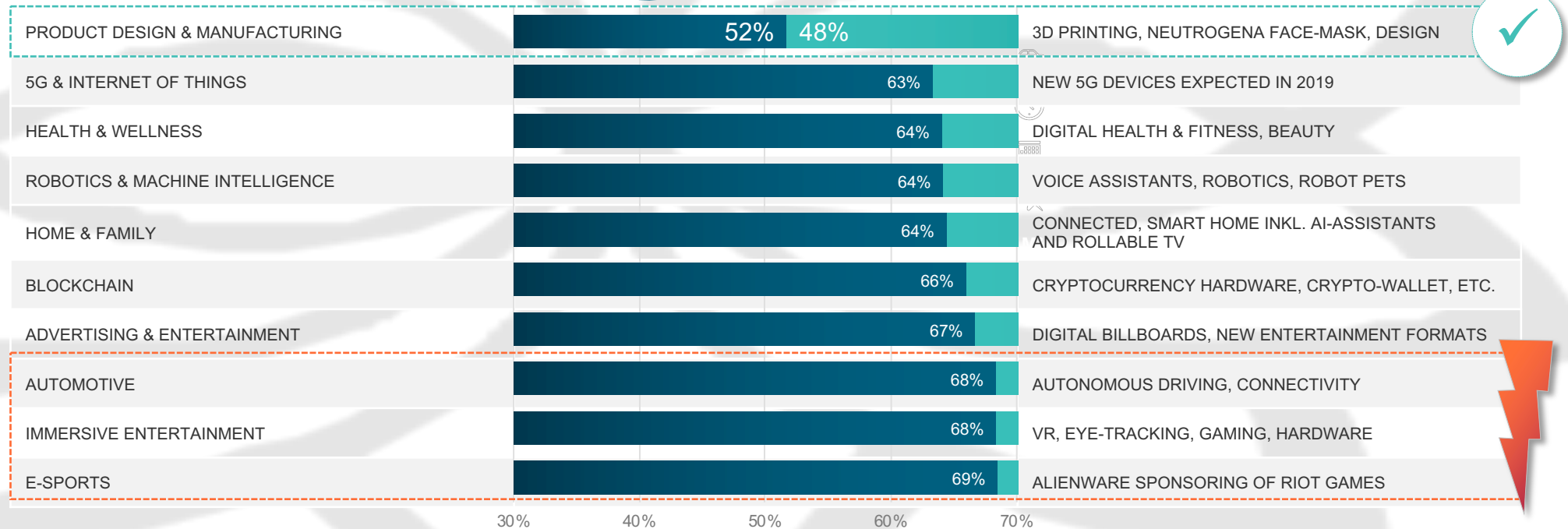## Only product Design & Manufacturing attracts female readers

Male **65%**   CES   Female **35%**

✗ No surprise, male readership is overrepresented in e-sports, immersive entertainment and automotive topics

✗ 5G, IoT and health/wellness topics are also dominated by a male audience, but manage to attract more female readers

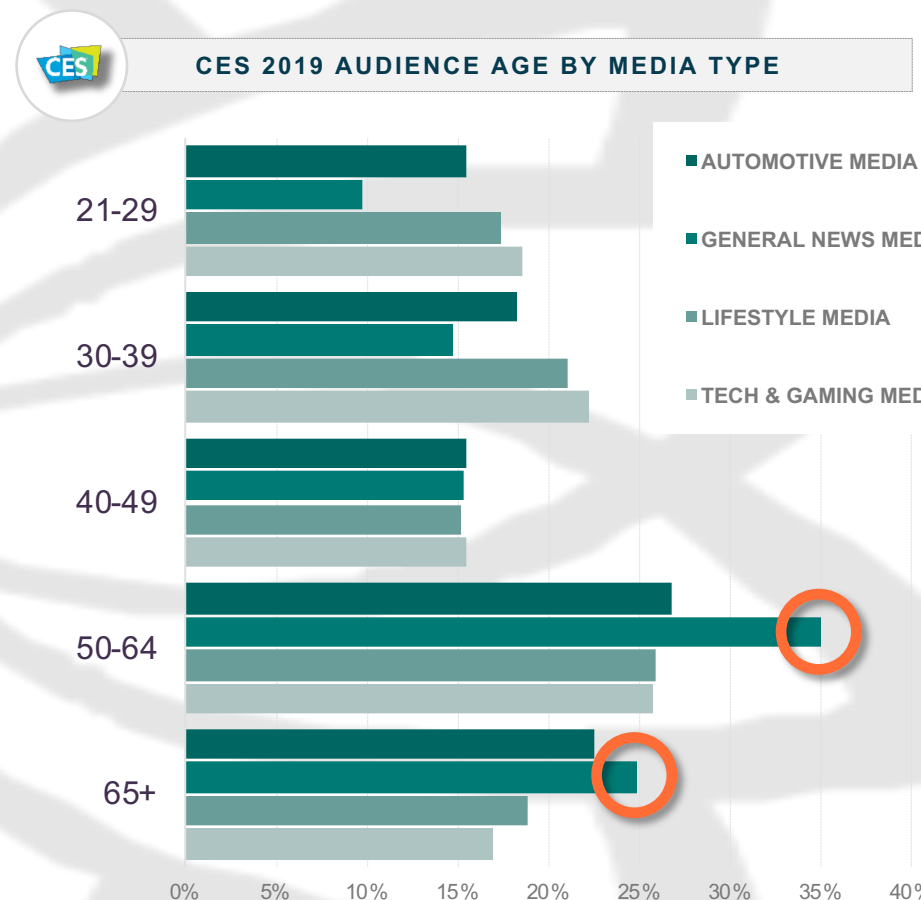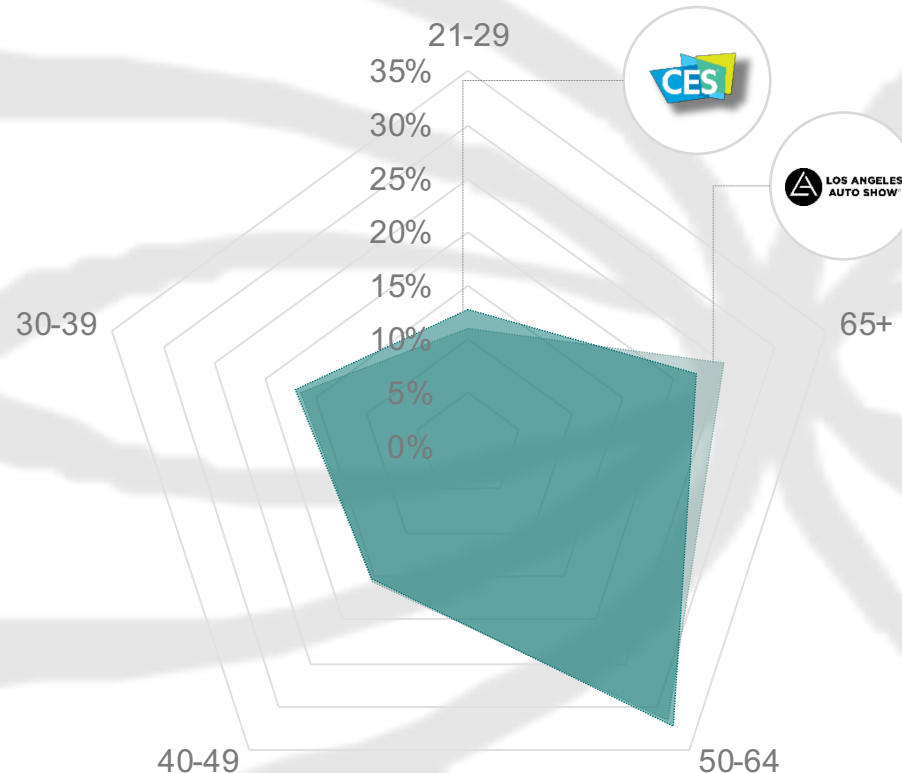| Topic	Male %	Keywords
PRODUCT DESIGN & MANUFACTURING	52% / 48%	3D PRINTING, NEUTROGENA FACE-MASK, DESIGN
5G & INTERNET OF THINGS	63%	NEW 5G DEVICES EXPECTED IN 2019
HEALTH & WELLNESS	64%	DIGITAL HEALTH & FITNESS, BEAUTY
ROBOTICS & MACHINE INTELLIGENCE	64%	VOICE ASSISTANTS, ROBOTICS, ROBOT PETS
HOME & FAMILY	64%	CONNECTED, SMART HOME INKL. AI-ASSISTANTS AND ROLLABLE TV
BLOCKCHAIN	66%	CRYPTOCURRENCY HARDWARE, CRYPTO-WALLET, ETC.
ADVERTISING & ENTERTAINMENT	67%	DIGITAL BILLBOARDS, NEW ENTERTAINMENT FORMATS
AUTOMOTIVE	68%	AUTONOMOUS DRIVING, CONNECTIVITY
IMMERSIVE ENTERTAINMENT	68%	VR, EYE-TRACKING, GAMING, HARDWARE
E-SPORTS	69%	ALIENWARE SPONSORING OF RIOT GAMES

30% 40% 50% 60% 70%

Age, Topicality or Media Habits?

Do trade shows attract the target audience?

✗ CES coverage attracts an older audience at the expense of younger generations. This trend is mainly driven by general news media and may reflect "who actually buys tech

✓ Tech and lifestyle media manage to attract a much younger audience than general news or automotive media

CES 2019 AUDIENCE AGE BY MEDIA TYPE

- AUTOMOTIVE MEDIA
- GENERAL NEWS MEDIA
- LIFESTYLE MEDIA
- TECH & GAMING MEDIA

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Data
CISION IMPACT

Universe
Posts and articles with references to the CES 2019

Period
CES 2019: 01.01.2019-16.01.2019

Markets
Global audience (US-articles)
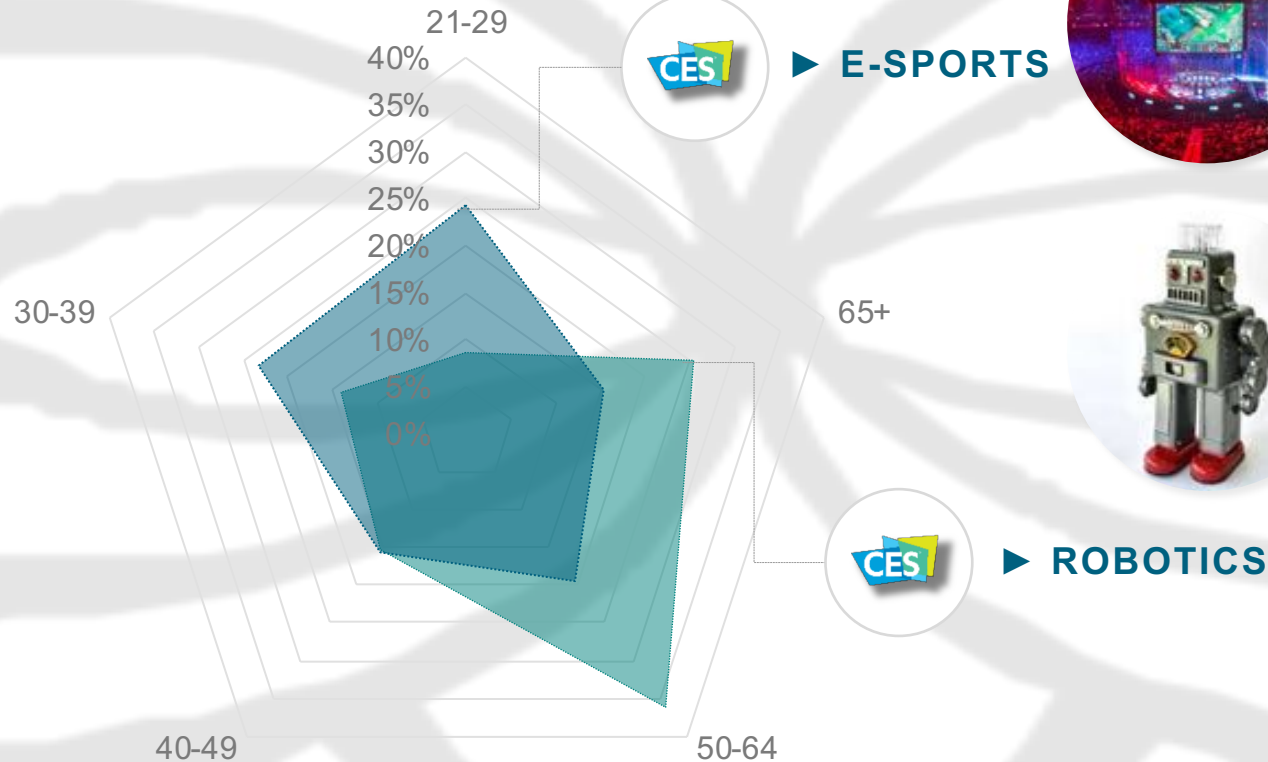
Media
Online

Topics enable generational targeting

E-sports attract the youngest audience while Robotics appeal to older audiences

✓ E-sports: attracts a young audience and readers from South Korea

✓ Robotics attracts readers within the age group between 50 and 64

▶ E-SPORTS

- Triggers a big audience from South Korea

- Attracts the youngest audience among all topics

▶ ROBOTICS

- Attracts the oldest audience among all CES topics

- Younger generations care much less about robotics and much more about the non-visible digital revolution (connectivity, machine learning, 5G, etc.)

Radar chart axes: 21-29, 65+, 50-64, 40-49, 30-39; scale 0% to 40% (0%, 5%, 10%, 15%, 20%, 25%, 30%, 35%, 40%)

Audience Profile: Blockchain

Blockchain attracts the most diverse readers

✓ Blockchain stands out with a very unique audience during the 2019 CES

Blockchain audience of the 2019 CES:

LOCATION: Attracts most Arabic, Chinese and Russian-speaking readers among all topics

GENDER: Female readers much less interested in blockchain topics than male

FAMILY STATUS: Highest share of "singles" among all topics

EDUCATION: Attracts a very well-educated audience

INCOME: But with a lower income than any other topic at the CES

BACKGROUND: Mainly attracts readers with an IT background

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Thank you