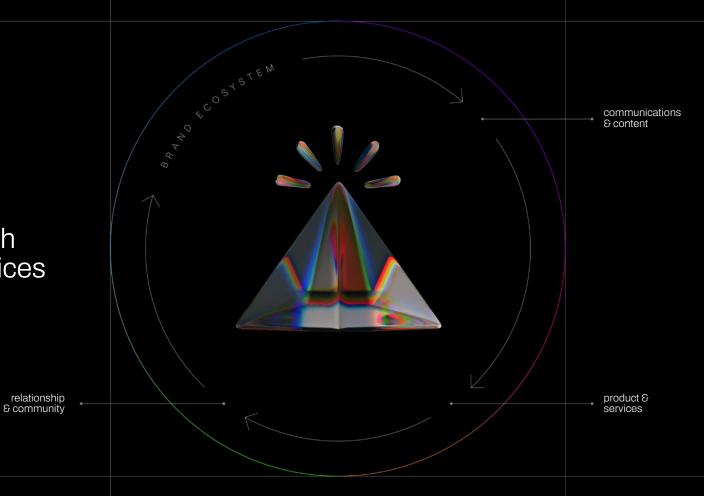


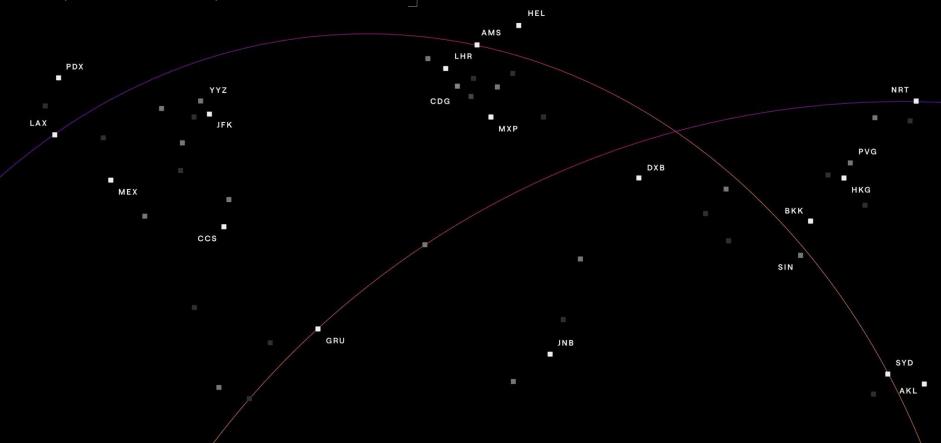
NEXT is TBWA's global innovation practice designed to lead brands into new spaces.



We use Disruption® to expand brand ecosystems through new products, services and experiences.



NEXT acts as a single entry point to a global collective of experience innovation specialists across TBWA\.

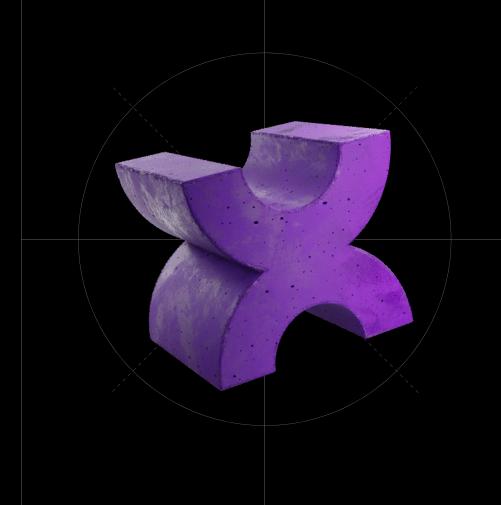


This report was created in collaboration with our experience innovation studio **dotdotdash**.



Let's dive into CES 2025

Unpacking the biggest shifts and emerging tech from CES 2025.



CES gives us a glimpse into the future of tech

As the world's largest stage for innovation, CES is an eclectic mix of conceptual dreams and consumer-ready tech that shows us where the world might be heading.













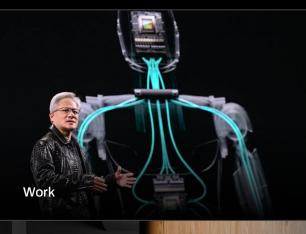
How can CES help us lead brands into new spaces?

From main-stage updates to the niche fringes of Eureka Park, we've distilled all the signals from CES to unpack what it could mean for brands.

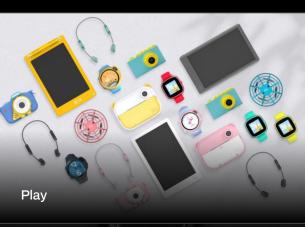
Because we believe

Shifts in culture and technology open up space for new ideas, experiences and growth.

These shifts are creating new ways to explore how we will...













But major shifts don't just move in one direction

Every year we see major technology shifts grow and die in the hype cycle, so we try to take an optimistic but realistic approach.



Now, let's explore

Eight observations Eight major shifts

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Al is in everything

Undoubtedly the biggest headline for a second year was the growth of AI in every category, company, and new release.

Al is reducing human autonomy

But we felt a growing unease that we're removing human thinking from every interaction with brands and products.

Owning the ecosystem

Outside of their individual product releases, the big players all set out to own the ecosystem and hub model, creating their own walled gardens.

Open-source platforms

Meanwhile we see a direct pushback against this era of tech in favor of more open-source protocols and shared resources.

Proprietary & Confidential

Removing friction

The tech industry continues to master frictionless experiences that remove interactions and make life easier.

Good friction and playful design

Meanwhile we observed a boom in more playful and fun products that celebrate friction, opening up a more exciting era of design.

Bold, audacious dreams

Beyond playful designs, we also felt a return to bigger, more audacious concepts where companies are taking a risk on a novel concept.

Micro optimization

But naturally we still see a lot of incremental innovation focused on small optimizations over quantum leaps.

Frugalism and resourcefulness

In recent years we felt that CES was a reflection of our cultures' need for more frugal concepts to navigate the constant state of economic, climate, and political crisis.

Hedonistic and frivolous design

But this year we saw products push back against this shift and celebrate more hedonistic concepts with more single-use concepts that are non-essential. This creates a more exciting spectrum of ideas.

XR's immersive & escapist future

In previous years we tracked signals of a more immersive and spatial approach to XR at CES. Who remembers the metaverse?

XR becoming more practical

This year we saw a greater focus on more practical and realistic use cases in glasses and mirror formats, following the lead of the Vision Pro.

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Inclusive design for one

Every year CES becomes a helpful barometer of which brands truly care about inclusivity in their product designs and not just their brand promises.

Scaled solutions for the many

This year we felt a focus on more accessible solutions that target the masses and solve broad problems.

Designing for early adopters

We also tend to see an obsession with fringe audiences and early adopters at CES.

A rise in age tech and kid tech

In contrast, we saw more kid tech and child-specific releases as companies seek to capture new markets and emerging consumers.

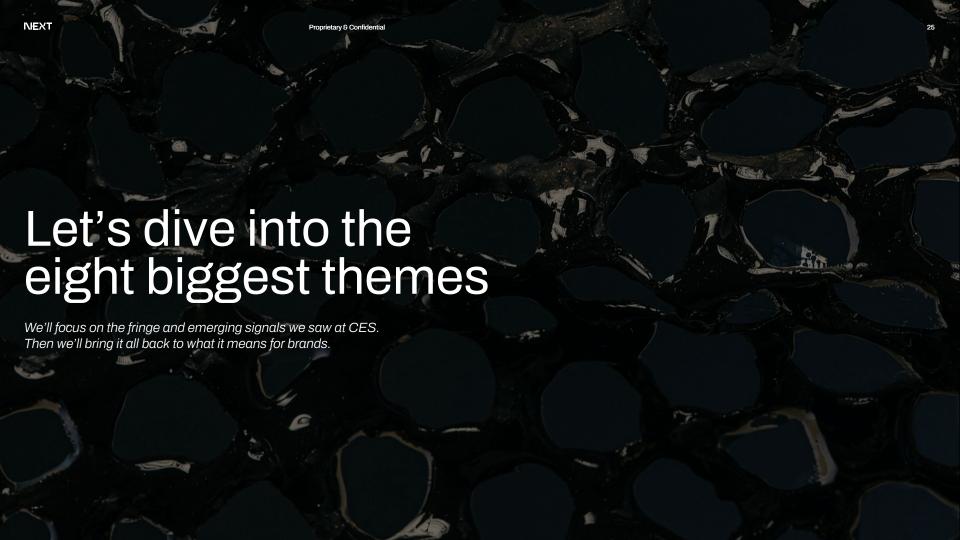
But what does all of this mean for my brand?

We get it, it's hard to relate semiconductors to selling insurance, but bear with us as we curate the best from CES and translate it back to brand experience. Start by asking...

- + How will this emerging technology **shape future behaviors** that will impact or open up new growth opportunities for my brand?
- + How could I apply these emerging technologies into my **brand and product experience**?
- + How could I collaborate with any of these pioneers who are already looking for use cases and partners to bring their innovations to life?

A new experience toolbox and expanded creative canvas

Ultimately, as brand builders and creative architects, we are excited by the new opportunities and behaviors at our disposal.



CES 2025

Eight themes from CES 2025



Al was everywhere and in everything. As Al integrates into more of our devices and converges across categories, we're seeing a more collaborative approach to ensure that interoperability is achieved across different platforms and systems.

Al Goes Physical

Al is in its hardware era. We continue to see Alintegrated hardware rise in popularity as it enters more intimate and personal areas of our lives. From beauty tips, to productivity, brands who are applying Al in exciting new ways will win.

Playful Robotics

Robots are growing up and glowing up.
This year we also saw robots transform into
trusted companions and assistive helpers,
taking care of our needs while embodying
oute and playful formats we can trust.

Simulated Senses

We're seeking sensorial immersion. A once niche corner of CES is growing in influence, as we continue to see technology that can immerse us in virtual worlds and simulate our senses in more realistic ways, blurring the line between real and fake sensations.

Optimized Anatomy

Healthcare has never been more accessible. Each year we see a variety of democratized, on-demand, and self-administered health solutions at CES. But this year it exploded in influence and expanded across the body and mind. We can now test everything that goes in, goes on inside, or comes out of our bodies.

Extended Reality Gets Productive

XR grew up and got a job. This year at CES we saw extended reality shift from far-flung fantasies to more practical and productive use cases in our daily lives. Products that elevate our sense of reality and aid us in productive tasks are coming into the spotlight, promoting more mainstream adoption.

Ambient Interfaces

The interface is disappearing. As screen time becomes the enemy we're actively seeking out solutions that limit our need to interact with interfaces or that hide the technology completely. The rise of ambient interfaces will require brands to rethink how consumers engage with them.

Design for One, Scale to Many

Inclusive design is here for good. One of the more uplifting sides of CES is a continued commitment to inclusive design across all categories and industries. This year we were excited to see solutions that were designed for one hyper-specific need, but were able to scale to many and improve experiences for the masses.



Convergence Of AI

Al was everywhere and in everything.

As AI integrates into more of our devices and converges across categories, we're seeing a more collaborative approach to ensure that interoperability is achieved across different platforms and systems.

Are you still waiting to embrace AI in your experiences?



Convergence of Al **Examples**

Samsung Al Smart Home



Samsung has continued its vision for the modern home where every appliance is part of an interconnected, Al-driven ecosystem.

Samsung is launching new AI-enabled devices, from washing machines, vacuums, and most noteworthily, new fridges that are integrated with Instacart's product-matching system, where it can recommend items to replenish and let you place an order with just a few taps.

LG Strategic Partnership with Microsoft



LG announced a strategic partnership with Microsoft to further implement Al-assisted services across all their home devices

Microsoft Copilot will be integrated into their latest Smart TV offerings, and they are also working on enhancing Al agents for various spaces, including homes, vehicles, hotels and offices.

Google & Gemini Integration



Google's flagship artificial intelligence model, Gemini, is being integrated into new Google devices including Google TVs and smartwatches.

This signals a further push into wider extended ecosystems where Al assistance acts as the connective thread across devices and users.

Matter Devices



This year we saw more Matter compatible Alenabled smart devices than ever. Matter is an industry standard developed by Apple, Google, Amazon, Samsung, and many others, to enable easier, more secure and more reliable communications between devices.

While the standard is not new, we're seeing the move towards interoperability enable more widespread AI home device adoption.



Convergence of Al What Does This Mean For Your Brand?

Al is becoming the glue that connects our phones to our washing machines to our refrigerators and everything in between, unlocking new cross-device use cases, interaction styles, automation, and personalization across every facet of our lives.

Brands will need to be ready for this shift in product and service expectation, and consider how AI can play a meaningful role in how consumers experience your brand world or ecosystem. Alternatively brands can choose to take a stance against this, and opt for more human to human interactions.

Convergence of AI What If?

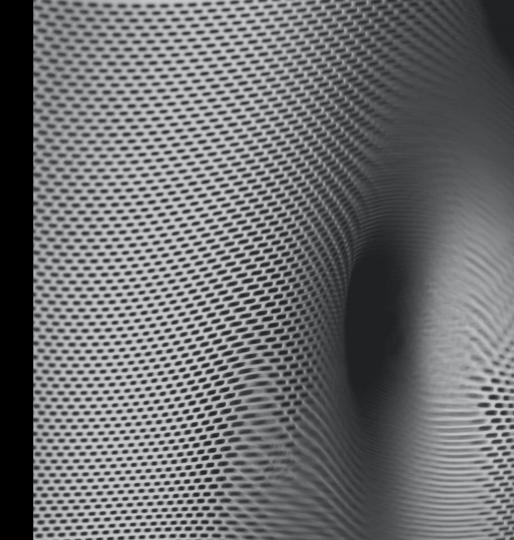
- What if every brand touch-point was an Al powered entry to an end-to-end CX?
- What if the best way to reach your audience was by targeting their agentic AI first?
- What if you could create AI experiences or utilities that work across different ecosystems?



Al Goes Physical

Al is in its hardware era. We continue to see Alintegrated hardware rise in popularity, as it enters more intimate and personal areas of our lives. From doing our laundry, to productivity, brands who are applying Al in exciting new ways will win.

How can we prepare for the next wave of AI innovation?



Al Goes Physical **Examples**

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Bee Pioneer



Henkel SmartWash



Henkel has launched SmartWash: an Al-driven, cartridge-based detergent dosing system that can power both washing machines and dishwashers. It creates an opportunity to minimize waste, whilst also allowing everyday users to personalize their clothing care in real-time.

Natura Umana HumanPods



HumanPods are open-ear wireless earbuds that enhance your capabilities in daily life, by enabling you to connect to AI with a single tap. There are multiple AI avatars and personas that you can chat with, each with a different function: e.g. fitness coach, travel guide, therapist.

Omi



Omi is an Al assistant wearable that you either wear as a pendant or affix to the side of your forehead. Instead of seeing the device as a smartphone replacement or an Al companion, Omi is meant to be a complementary device to your phone that boosts your productivity.

The Bee Pioneer is a wearable AI device designed to listen to you as you go through daily life, and uses the information it collects to build a personalized knowledge base. It's a personal AI that transforms your conversations, tasks, places and more into summaries, personal insights and timely reminders.



Al Goes Physical What Does This Mean For Your Brand?

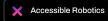
While early glimpses of AI-centric hardware may not have all delivered on its initial promises, the next wave of devices are here to re-establish their roles as intimate companions for our work and personal lives. They might just be here to stay.

With hardware playing an important role in enabling Al interactions, brands should think about how to incorporate more tangibility into their experiences, or seek out new form factors to bring Al ideas to life in a distinctive way.

Al Goes Physical What If?

- What if you could embed AI agents into your most iconic product form factors?
- What if you could drive new behaviors through physical AI devices?
- What if you could press a button and have your own AI assistant on-demand to help with product onboarding and education?

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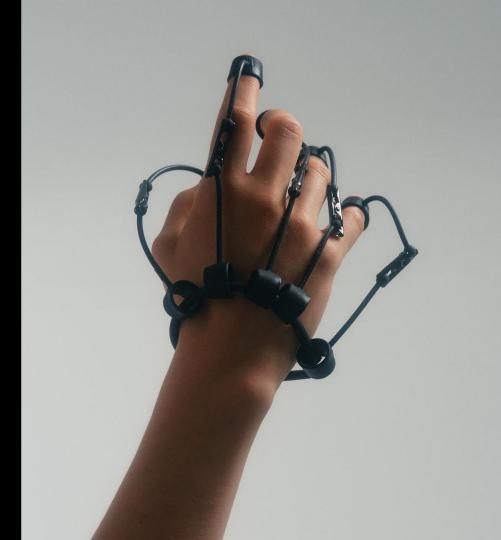


Playful Robotics

Robots are growing up and glowing up.

This year we also saw robots transform into trusted companions and assistive helpers, taking care of our needs whilst embodying cute and playful formats we can trust.

Are we in the middle of a consumer robotics boom?



Playful Robotics **Examples**

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Mirumi

Nekojita FuFu

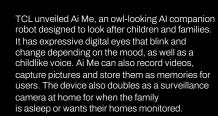


Tombot Robot Dog Jennie











US robotics company Tombot has unveiled Jennie, a battery and Al-powered robotic pet designed to provide companionship and comfort to those struggling with cognitive health.

The robotic pet was designed to look and act like a puppy to provide support for elders facing mild cognitive impairment or others with mental health challenges such as depression, PTSD or loneliness.

Mirumi is a mascot robot that spontaneously turns its head to steal a glance at a nearby person. Designed to recreate people's joyful experiences of noticing a human baby, Mirumi moves its head in several different ways to express its curiosity, bashfulness, and other baby-like qualities and emotions.



Playful Robotics What Does This Mean For Your Brand?

While OpenAI, Boston Dynamics, and Tesla Bots may stoke fears of Skynet and the robot apocalypse, many other designers are seeing the potential of going after the furry, cartoon-y mountain on the opposite side of the uncanny valley.

Brands should consider how they can make their cutting edge tech approachable by making it feel cute and familiar. The technology itself can be serious without the experience needing to feel that way.

Playful Robotics What If?

- What if your brand mascot was a playful robot that become a companion to your product experience?
- What if cute robots guided customers through your retail experience?
- What if a friendly robot could help tackle a major societal issue your brand is addressing? Loneliness? Aging? Education?



Simulated Senses

We're seeking sensorial immersion. A once niche corner of CES is growing in influence, as we continue to see technology that can immerse us in virtual worlds and simulate our senses in more realistic ways, blurring the line between real and fake sensations.

Could we make our experiences even more immersive?



Simulated Senses **Examples**

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Kirin Electric Salt Spoon













LOVENSE

Sex Tech For Everyone

Kirin showed off its new electronic spoon that makes your food taste saltier. It uses a weak electric current to concentrate sodium ion molecules in your food, adding a stronger umami and salt flavor to low-sodium foods to avoid the negative health effects whilst still providing an enjoyable food experience.

The MinVerse is a compact haptic device designed to elevate metaverse interactions and enable accurate 3D creation. Offering unparalleled precision for 3D touch, it delivers realistic, tactile feedback enabling users to interact with virtual environments with exceptional accuracy. Its small form factor makes it highly portable, perfect for immersive experiences anywhere.

Sony's XYN headset is focused on capturing, creating and playing within spatial worlds. It emphasizes 3D content creation with 4K OLED displays, Mocopi integration, and passthrough tech, empowering filmmakers, animators and gamers.

The sextech industry continues to be the trailblazers to adopt new technologies in innovative ways, and this year Lovense released a collection of long-distance smart sex toys that utilise Al to sync to any piece of content-allowing users to feel what they watch in real time.



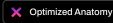
Simulated Senses What Does This Mean For Your Brand?

Our interactions with tech have been dominated by sight and sound for decades, but that is rapidly changing with screens and speakers now sharing space with haptic, scent and taste tech. We can now add more depth to our storytelling toolbox.

As "multisensory" becomes less of a buzzword and more of a technological reality, brands must consider how their offering can be expanded across these different modalities or risk being limited to one dimension.

Simulated Senses What If?

- What if you could incorporate haptics and other sensory elements into your otherwise static digital experiences—i.e. website, app, kiosk
- What if your brand identity had its own scent and taste?
- What if you could integrate scent and taste into a physical experience—i.e. the test drive or retail environments?

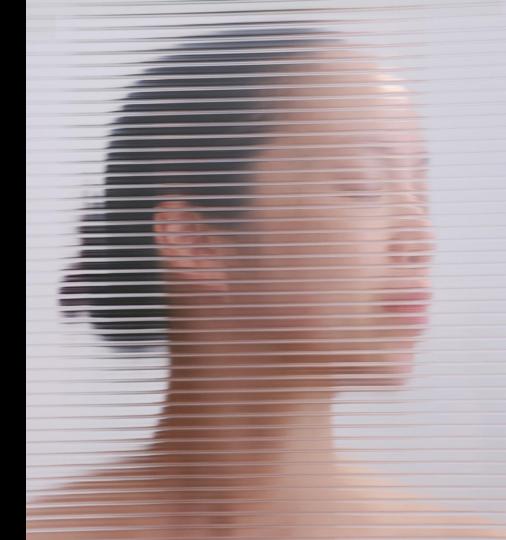


Optimized Anatomy

Healthcare has never been more accessible.

Each year we see a variety of democratized, on-demand, and self-administered health solutions at CES. But this year it exploded in influence and expanded across the body and mind. We can now test everything that goes in, goes on inside, or comes out of our bodies.

How can you give consumers more control and access?



Optimized Anatomy **Examples**

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Eli Health Hormometer



The Hormometer offers real-time hormone testing via a single-use saliva analyst. Connected to the users smartphone, the Hormometer offers health insights ordinarily uncovered through specialist testing. This increased efficiency in understanding hormone health allows for quick response via lifestyle changes. Currently cortisol and progesterone testing is available.

Vivoo Urine Testing



The Vivoo at-home urine test provides users with results in 90 seconds, offering speed in delivery unlike traditional lab testing methods. Measuring nine wellness parameters including vitamin and mineral levels, along with specific testing for fertility, hydration and pH levels—this tool makes it easier than ever to understand what's going on inside the body to begin making improvements where necessary.

AirRay-Mini Portable X-ray System



AirRay-Mini is a portable system that provides high-quality X-ray imaging for rapid and accurate medical services in emergency situations or environments where patient mobility is limited. The user can see the images immediately by mobile phone and Alassisted diagnostic solutions will help uncover a more accurate diagnosis.

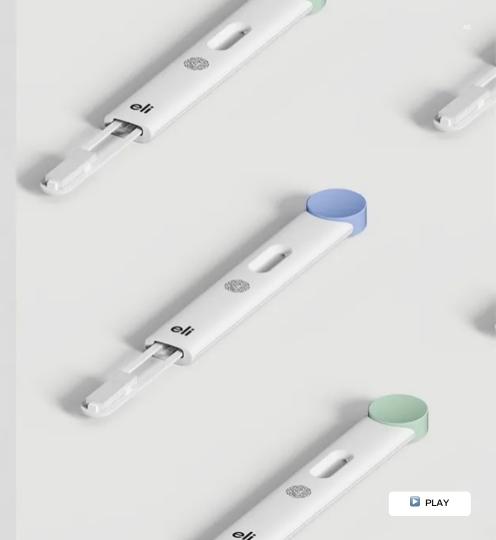
Withings Omnia Smart Mirror



Withings Omnia is a conceptual Al-powered fulllength smart mirror capable of providing a full health assessment. The mirror captures a 360degree body scan and determines your weight, heart, and lung health. It can even take an electrocardiogram, track blood pressure, heart rate, Vo2 Max, and sleep quality. It's a push towards an all-in-one health hub with all biomarkers monitored to bridge the gap between knowledge and action in healthcare. Optimized Anatomy **Eli Health-Hormometer**







Optimized Anatomy What Does This Mean For Your Brand?

On-demand self health tests pose both incredible benefits and a concerning darkside. When it comes to the good, they offer people with chronic conditions or particular health risks easier, cheaper and faster ways to monitor for issues before they turn into life-threatening problems. But they also threaten to overwhelm us with data overload and risk people falling into WebMD-induced hypochondria.

Either way, our desire to use technology to peer ever more deeply into our bodies—and change them in the process—cannot be denied. Brands should consider how they can deliver more transparency and control especially when it comes to their consumers health.

Optimized Anatomy What If?

- What if you could develop your own DIT test tailored specifically for your product?
- What if you could personalize products based on the latest testing tools and tailored it to consumers' unique biology and needs?
- What if your brand took a stand against selfoptimization anxiety, opting for a more human and expert led approach?



Extended Reality Gets Productive

XR grew up and got a job. This year at CES we saw extended reality shift from far-flung fantasies to more practical and productive use cases in our daily lives. Products that elevated our sense of reality and aid us in productive tasks are coming into the spotlight, prompting more mainstream adoption.

Are you overlooking the power of XR in everyday life?



Extended Reality Gets Productive **Examples**

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Xander XR Glasses



Xander Captioning Glasses use the principle "sight for sound." The product has one primary purpose: to assist people who have hearing challenges, enabling them to understand speech and participate in conversations in a natural way. It translates speech to text in real-time, and projects accurate captions of conversations that are visible only to the wearer.

Unistellar Envision Smart Binoculars



The Envision Smart Binoculars are a set of ARenhanced binoculars created to transform how people see the world around them and explore the night skies. These binoculars provide an information-filled overlay and can identify over 200.000 stars when used at night.

Halliday Al Smart Glasses



Halliday has launched a pair of smart glasses that project a tiny digital screen directly into the wearer's eye. Using a device called the DigWindow, the glasses display notifications, language translations and navigation directions in real-time without the need for bulky AR lenses.

Kosé Mixed Reality Makeup



Kosé's Mixed Reality Makeup is a system that offers an entirely new makeup try-on experience based on high-speed projection mapping technology. It does this by projecting realistic makeup directly onto a face whilst being able to follow facial movements. Since customers can try countless makeup designs in a real 3D space, they can choose products faster, with more confidence and fun than conventional try-on or AR makeup filters.



Extended Reality Gets Productive What Does This Mean For Your Brand?

The promise of fully-immersive and capable face computers—at least in form factors and at prices everyday consumers actually want—remains elusive for the moment, but in the meantime XR is finding targeted ways of improving the practicalities of everyday life.

Brands need to think about how to elevate their interactions through more immersive and immediately useful applications of XR. But let's not overlook the possibilities for immersive experiences and deeper storyellting that XR can facilitate.

Extended Reality Gets Productive What If?

- What if you could create XR overlays for product information in-store and online?
- What if you could use heads up displays to help make experiences more inclusive?
- What if you could use XR projection mapping techniques to make product exploration more immersive and intuitive?



X Ambient Interfaces

Ambient Interfaces

The interface is disappearing. As screen time becomes the enemy we're actively seeking out solutions that limit our need to interact with interfaces, or that hide the technology completely. The rise of ambient interfaces will require brands to rethink how consumers engage with them.

Can you own a unique voice, gesture, or interaction?

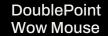


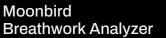
Ambient Interfaces **Examples**

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Corning & CarUX Dynamic Décor













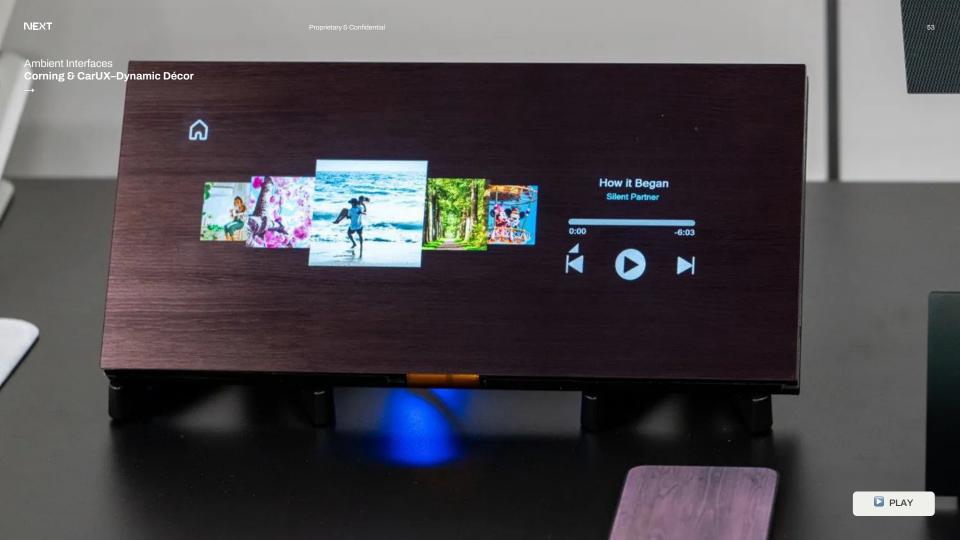


The glass and materials titan partnered with vehicle interior technology company CarUX to develop Dynamic Décor, a technology that reinvents the dash by elegantly hiding interfaces behind true-color patterns. Information and UI components appear in high quality when needed, then disappear when not in use, leaving luxurious surfaces such as wood or leather.

The Samsung HoloDisplay concept uses advanced sensors and aerial display technology to provide a display that hovers right over your kitchen cooktop. For ultimate convenience, you control what you see (like recipes, news, timers, and more) using gestures or voice.

Finnish startup Doublepoint launched its free app, WowMouse, designed to transform your Apple Watch into a gesture-based mouse for controlling devices. This new technology leverages the watch's built-in sensors, including its accelerometer, compass and motion sensors, allowing users to control devices with simple hand gestures, such as pointing and tapping their thumb and index finger together.

Moonbird uses an incredibly intuitive haptic feedback mechanism to guide users through breathwork without needing a screen, audio, or any other potentially distracting tech. A sensor on top tracks your heart rate over time to provide live biofeedback. All this comes in a sleek, ergonomic device that rests naturally in the palm of your hand.



Ambient Interfaces What Does This Mean For Your Brand?

Tech continues its march towards invading every aspect and touchpoint of our daily lives, yet there remains a strong urge escape it—but crucially without giving up the benefits it provides.

Brands should consider how they can make their tech invisible whilst still delivering value to users. As interactions continue to go screenless, brands should start to own a unique voice, gesture, or entirely new modes of engagement.

When done right, it makes tech feel like life-improving magic rather than a life-sucking distraction.

Ambient Interfaces What If?

- What if you could create an ambient shopping experience?
- What if you could create ambient mode on your existing digital experiences?
- What if you could design your CX around voice being the primary starting point?



X Inclusive by Design

Design For One, Scale To Many

Inclusive design is here for good. One of the more uplifting sides of CES is a continued commitment to inclusive design across all categories and industries. This year we were excited to see solutions that were designed for one hyper-specific need, but were able to scale to many and improve experiences for the masses.

Are you overlooking audiences and limiting experiences?



Design For One, Scale To Many **Examples**

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Lotus Ring

Hypershell X-series Exoskeleton

HL Klemove BEETLE+

L'Oreal Cell BioPrint



Hypershell X is the world's first outdoor wearable exoskeleton designed for hikers. It offers enhanced assistance that can significantly boost lower limb strength and minimize physical fatigue during outdoor adventures, leading to elevated overall athletic performance. This benefits people with a spectrum of mobility challenges.

HL Klemove's BEETLE+ is a portable radar sensor for daily safety. It makes our movements safer by detecting and forewarning potential dangers in our blind spots while walking, riding, or driving. The compact size means that it can be carried easily and applied in a range of different environments, far beyond the vehicles that it was intended for.

The L'Oreal Cell Bioprint is a tabletop hardware device that provides personalized skin analysis in just five minutes. It gives users information such as the skin's biological age, ingredient responsiveness and predicts issues before they become more visible. Whilst catering to diverse skin types and issues.





Lotus is a wearable ring that controls objects at home just by pointing. It's compatible with any device that uses switch covers—whether lights, fans, AC units, or TVs—as long as the switch cover fits. It works by applying a simple technology like infrared in an innovative form factor to solve daily problems for those with mobility and cognition-related disabilities, but faced by many.



Design For One, Scale To Many What Does This Mean For Your Brand?

It is a strange paradox of design that when you try to create something for everyone, you often end up with something for no one—whilst designing for a very focused target can in fact unlock innovations that benefit everyone.

Brands should consider what they can do for too-often overlooked segments in their audience—from those with disabilities, to underrepresented identities, to young children or the elderly. You never know how solutions for these groups might just be the thing to supercharge your offering for the general public at large. Just look at the iPhone.

Design For One, Scale To Many What If?

- What if you included underrepresented groups in your design process to help identify solve for one use cases?
- What if you partnered with an Inclusive Design solution (like Lotus) to integrate the technology into your product experience?
- What if you redesigned experiences to remove unnecessary friction for all?

CES 2025

In Summary, eight themes from CES 2025

