



Consumer AI:

The Experience for the Agentic Future

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So why are we
talking about
consumers and
devices this year?

AI Transforms Business, but also Consumers

- The way that consumers (and individual employees) engage with technology is changing
- For B2C brands, this means new opportunities and ways to engage your customers
- For B2B companies supplying technology can empower those B2C brands with tools, platforms, and infrastructure to compete

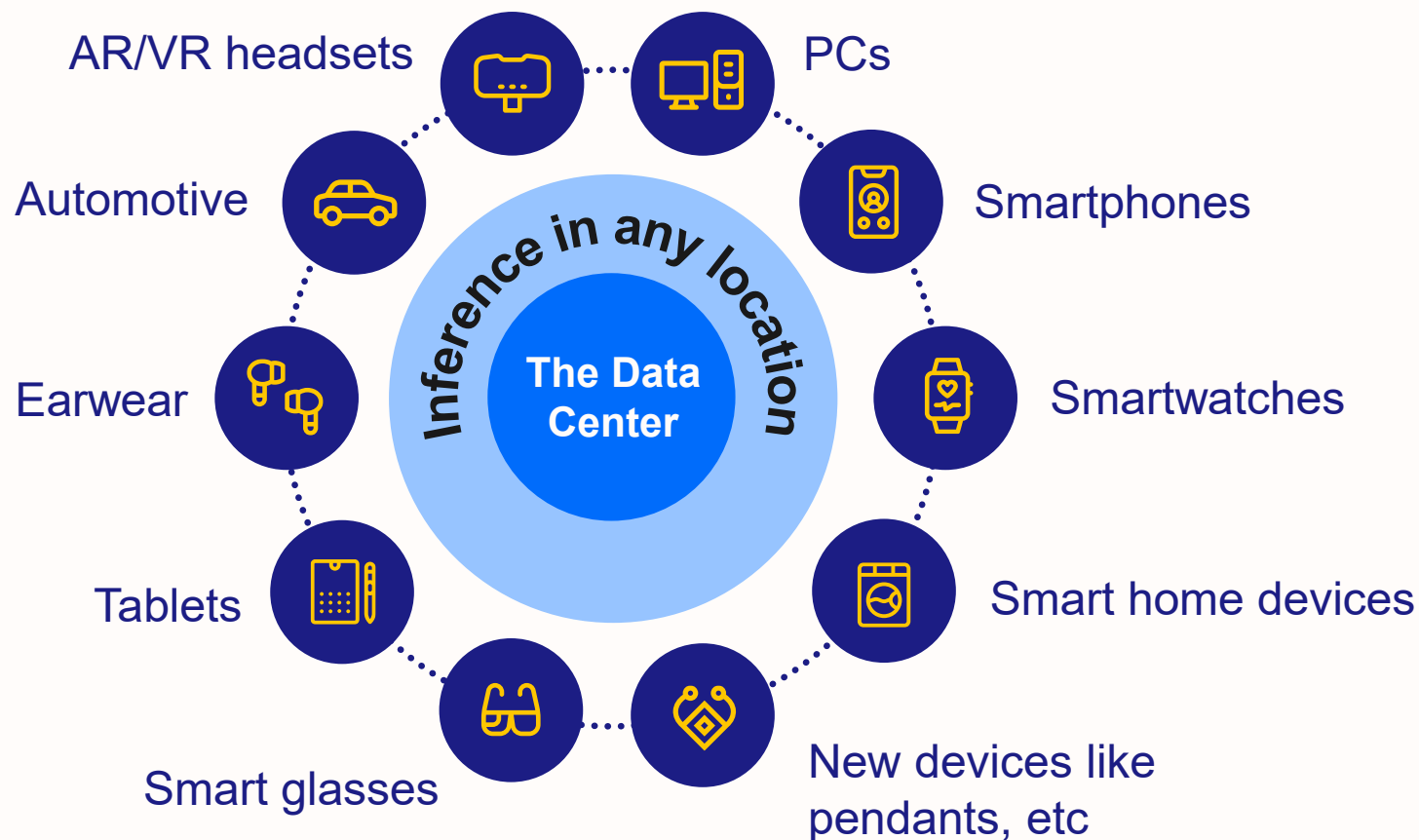


Devices are a Visible Endpoint in a Much Larger Picture



Devices are all the more important in the age of AI

- They are the user interface (which is changing!)
- They are the sensors on the edge that feed model training, personalization
- They are processing on the edge where (some) inference will occur



Hybrid AI Models Both on Device & in the Cloud



Running models on-device

- Lower latency
- Reduced workload and costs in data center
- Personalized, secure, and sovereign

AI models aren't just in the datacenter



By 2030, up to 50% of enterprise AI inference workloads in APJ will be processed locally on endpoints or edge nodes, reducing cloud traffic and latency while supporting greater control over sensitive data.

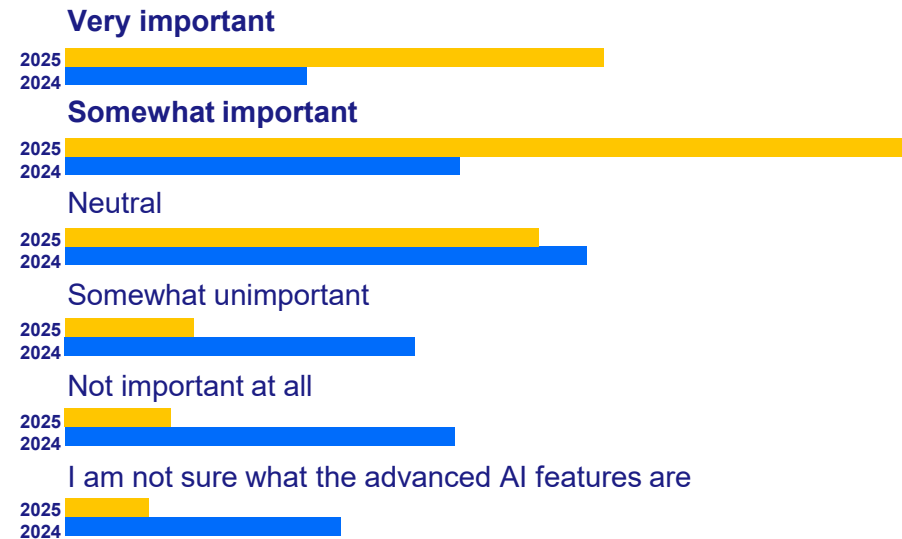


By 2029, 40% of enterprise workflows in APJ will span multiple connected endpoints, with AI agents assisting in task handoff, contextual recall, and user state continuity across devices.



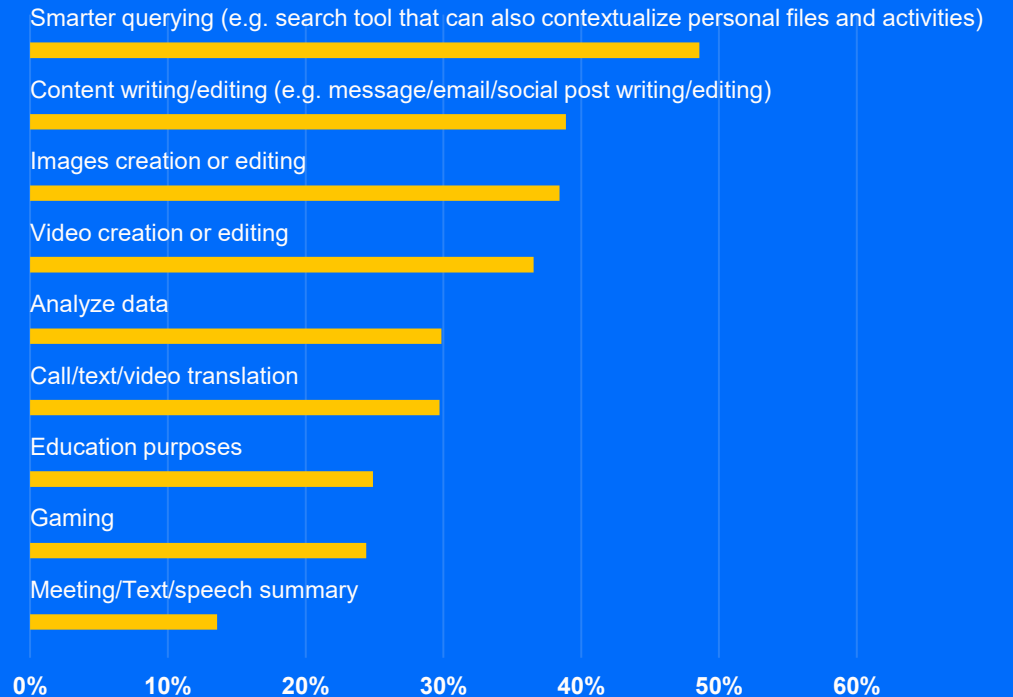
Consumers are More Aware and Interested in AI Devices

How important are advanced artificial intelligence (AI) features when you purchase a smartphone?*

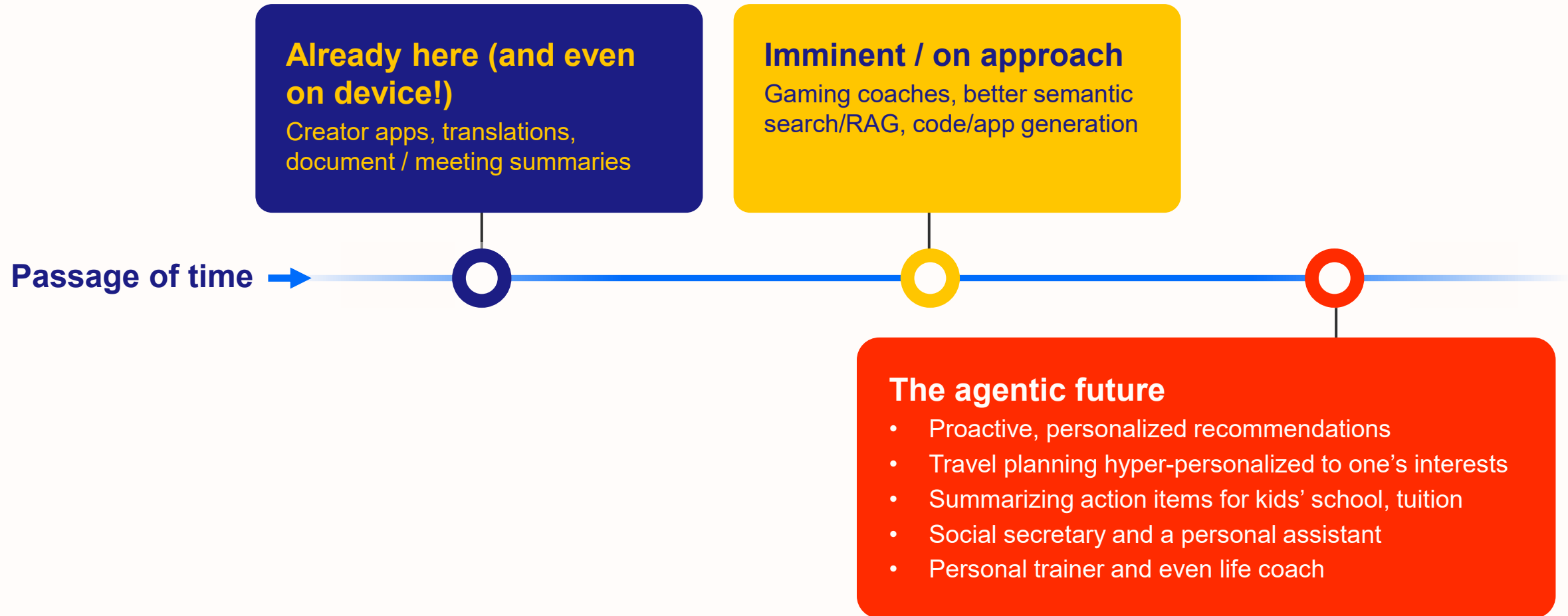


* Advanced AI features include but are not limited to AI Erasers, Circle to Search, Live Translate, etc.

If artificial intelligence features on a smartphone can help you complete these tasks, which would be your Top 3? (aggregated)



Personal AI Use Cases will Get More Sophisticated as We Get More Agentic



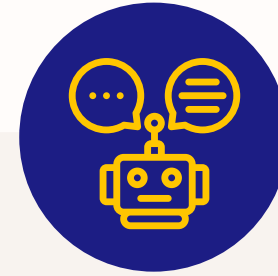
4B Global Users of Consumer GenAI in 2028, Both on Device and in the Cloud



Managing Daily Life



By 2029, 8% of households in APJ will subscribe to AI agents handling scheduling, shopping, finances, and routine decisions, creating a multibillion-dollar market for life management services.



Companions as Therapists



By 2027, 20% of Gen Z in APJ will use AI companions for therapy, surpassing those seeing human therapists, creating opportunities for AI vendors to integrate mental healthcare and prescription services.





For B2C brands, we need to build more human, responsive, and resilient connections with customers.

Opportunities emerge to build products and services that prioritize emotional well-being and create deeper, more authentic customer relationships.

New service categories will emerge, where customer loyalty hinges on how seamlessly brands integrate into AI-managed lifestyles.

Trust will become a competitive differentiator. Brands must anticipate and proactively manage AI-related risks that impact customer safety.



For technology vendors, it's a chance to help those brands deliver on the promise of AI at scale.

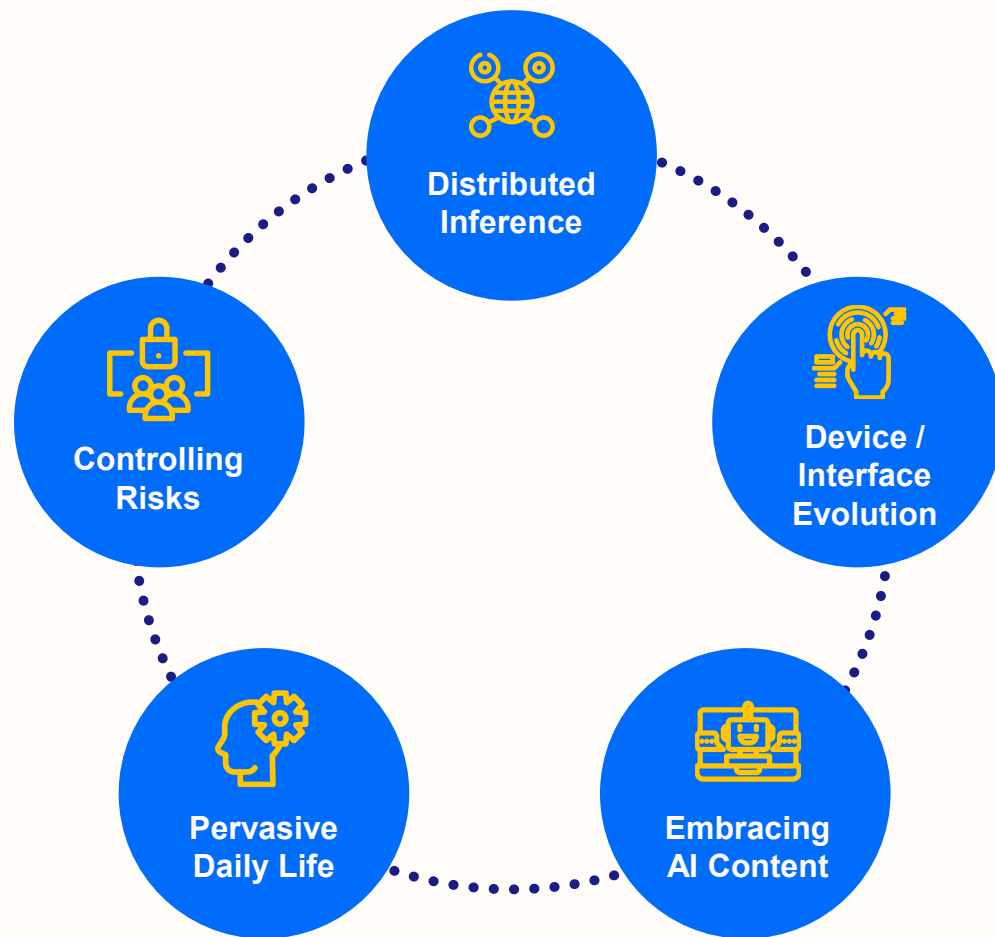
Expect a growing need for AI solutions. SEO gives way to Answer Engine Optimization (AEO) or Generative Engine Optimization (GEO).

Demand opens for APIs, connectors and integrations, and platforms that allow AI assistants to securely transact, recommend, and automate across ecosystems.

A market will emerge for monitoring, auditing, and security solutions tailored to consumer AI applications.



Tech Blueprint for the Agentic Consumer Future



Device Vendor

Supply NPUs to put the chicken before the egg, reduce connectivity friction, look at new interfaces



Infrastructure Vendor

Be mindful of datacenter vs device operating costs, enable and partner for handoffs, sell the solution



SW/Services Company

Enable B2C companies with tools and services ranging from interface to agentic operations to AEO/GEO



Security Supplier

Help companies manage risks around AI models, personal safety, parental controls





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