

Monday Afternoon Session

Our Disruptive Economy: An Economic, Financial and Technology Outlook

Speaker: Jason Schenker

- Excellent presenter of a very challenging subject
- Relevant and fresh, good info
- Smartest guy in the room; very interesting with a lot of data
- Would have been better before lunch
- Good that it will be offered online as there was a lot of information, too much to absorb
- Kudos to the general session committee, speakers have all been great
- No idea when the other show will fall
- Recession concern
- Great insights on China manufacturing and recession
- Too technical and long
- Needed time for questions
- Several eye-chart slides
- Became more interesting at the end
- Follow Jason, he is very good
- Best econ session at the Conference in years
- Battery supply chain – watch China risk point
- Recession is on our future, plan “cash is king”
- Tariffs and trade talks will produce continued vitality
- Positive growth in 2019 and 2020, but slowing
- Electronics economics – IoT, sensors, block chain, 3-D printing, drones, self-driving cars are the future, next five to ten years (disrupters)
- We all need to be technology driven companies
- Awesome, very relevant session, spot on
- Views on the EU surprising, but totally believable
- Tied all future tech together
- Overall very interesting but a bit too many statistics
- Possible recession in 2020
- Web everywhere
- Trend data for retail declining
- Stay relevant
- Change is constant – move with or just ahead trends
- IoT and sensors will have a huge impact on the future
- Excellent; the most entertaining financial person to be at any of the ERA Conferences
- Technology will continue to be a significant disruptor in the manufacturing world
- To thrive and survive in a disruptive world
- Every company needs to be a tech company
- Very smart but engaging
- Best explanation of block chain yet
- 10% of all sales come from e-commerce; 20% is on the horizon
- Cost benefit of electric vehicle still not there
- Marking technologies is on the rise to prevent counterfeiting
- 2019 is forecasted to be down from 2018; same for 2020
- A lot of data in a short time; interesting but a lot to digest
- Taxes and tariffs are an economic risk

- 2019 outlook is not good
- No definitive answers on 2019 or future
- CM trends chart with US, Europe and China
- The problems are not solved
- This was an excellent presentation
- Jason was very entertaining and also had very timely information to deliver
- His method of delivery was excellent
- A lot of the data presented has direct connection to our business
- Jason has published multiple books which lends extra credibility to his presentation
- Very good; relevant and brought it back to our industry; very entertaining
- Good presenter; best ever
- Technical trends not just economic forecasts
- Held my attention the whole presentation
- Trade issues not resolved
- Housing to be affected in near future
- Tagging products will be growth
- Drones will be delivering cargo
- 3-D printing of buildings
- Block chain is coming, need to understand it
- IoT and sensor are big growth
- Auto sales, housing have slowed in the last few months
- Be involved before IoT changes everything
- Made economics interesting
- Global growth – 2018 US and Europe up, Asia fell flat
- After 2018, 2019 US will grow real GDP increase by 2.5 %
- 2108 global growth increase by 3.9%
- 2019 US growth increase by 1.8% GDP, 2020 1.1% GDP forecast
- E-commerce is now 9.8% of retail
- Excellent data; needed Q&A
- Very relative to our industry
- Partner with him – a resident ERA economist
- Global growth: 2019 downtrend vs. 2018
- PMI (US, Euro, China)
- IMF growth forecasts
- Department stores: 500K jobs lost since 2001
- Wholesale jobs (warehouse and storage) added 700K jobs
- Wage for all retail less than warehousing
- Battery material prices way outpacing oil prices, so electric vehicle roll out adoption slowing % of IPOs with negative earnings on the rise
- Project management skills key – ask questions, manage processes
- 3-D printing in construction will grow
- Every company must be a tech company
- Good session, valuable, good delivery, entertaining
- Technology sector at risk – overly rated (stock prices)
- New IPO that are not making money
- IoT, machine learning and AI – can it be managed; project management skills lacking
- Block chain and crypto currencies
- Counterfeiting will become larger

- Drone – growth
- Self-driving cars – growth
- PMI (Purchasing Managers Index) is the best indicator for economy
- Tariffs and trade driving IMF
- Fed won't raise rates in 2019
- Auto construction tougher business in 2020
- Since 2001 department store employment has fallen
- E-Commerce is 10% of retail
- Electric vehicles slow growth through 2040 due to oil prices
- CTAN - Austin investment group most active
- Machine learning AI: don't know what to do with the data and don't know the correct questions to ask
- Block chain – multiparty accounting software
- Drones growth in large droves for infrastructure