

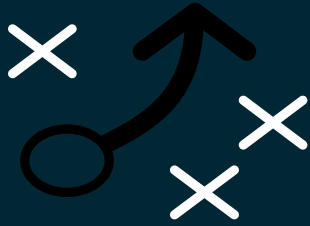
Digital ASEAN: On the threshold of transformation

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Strategy | Digital | Technology | Operations

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In a world where an ever-widening competitiveness gap is being forged between digital followers and digital transformers, **which path will your business take?**

Digital technology is driving change

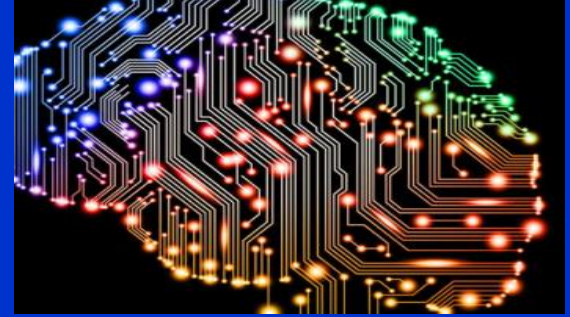
Mobility



Digital Platforms



Artificial Intelligence



Robotics



Social Media
























Big Data & Analytics



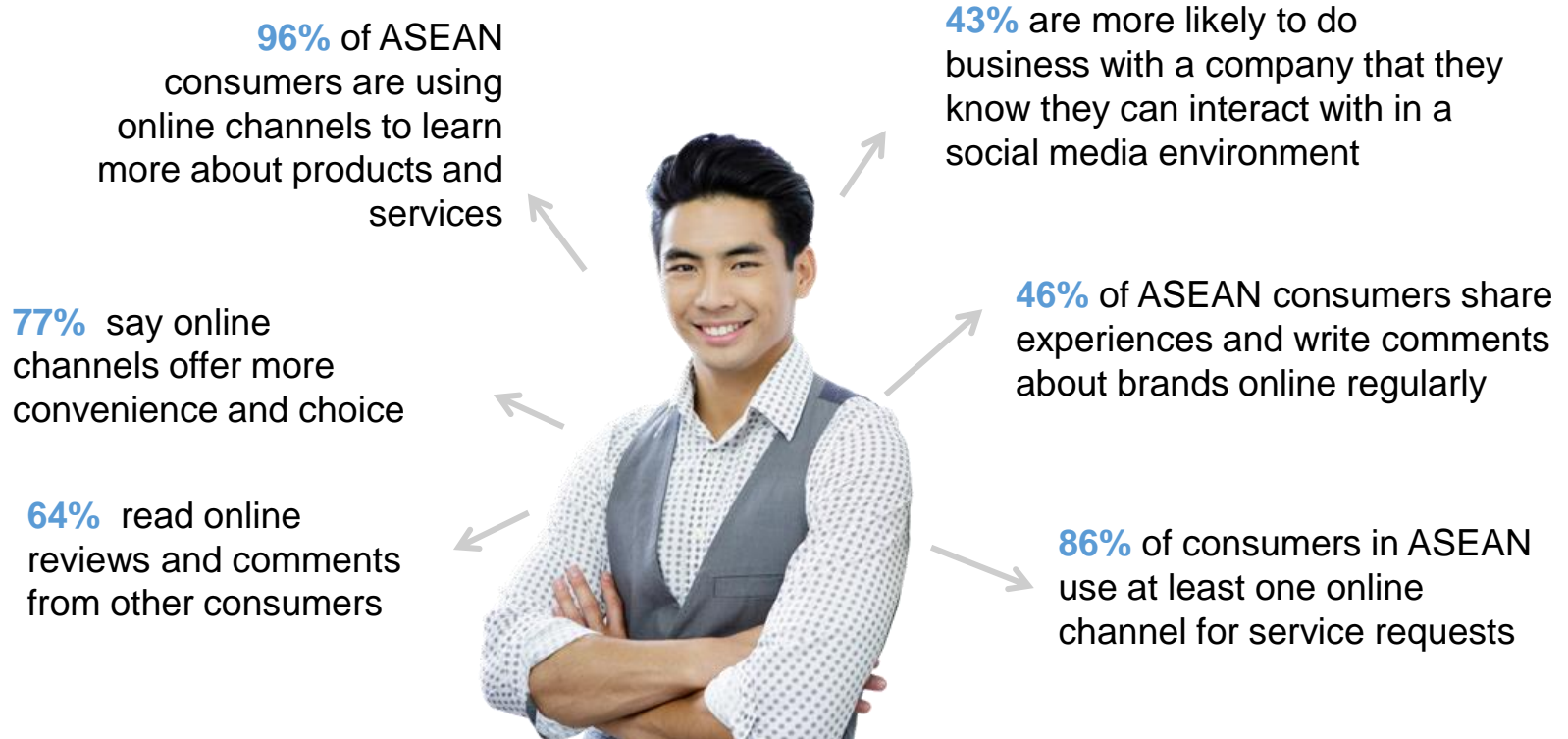
It is impacting all aspects of our lives



Whole industries are being disrupted

	Incumbents	Attackers	Why it matters
Banking	  	  	Up to 30% of bank revenues at risk
Retail	 	 	Mobile/Pinterest users purchase twice as much as online or in-store shoppers
Energy	 	 	313M smart meters installed globally; 1.1B by 2020
Communications	 	 	Whatsapp eating 50-90% of voice / SMS revenues
Hospitality	 		AirBnB valuation higher than most hotel chains, over 11mm stays and 750K listings

It is shifting the 'control' across the value chain and ASEAN's digital-savvy consumers are taking advantage



And it sometimes disrupts traditional business models to previously unimaginable levels



UBER valued
at the **SAME** amount as
DELTA AIRLINES





The accelerated pace of digital market competition make digital transformation a core assumption of any future business strategy.

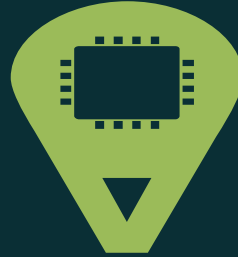
Is your organization ready to respond?

Leaders are taking advantage of digital throughout their organizations

Internet of Me



Outcome Economy



Platform (R) evolution

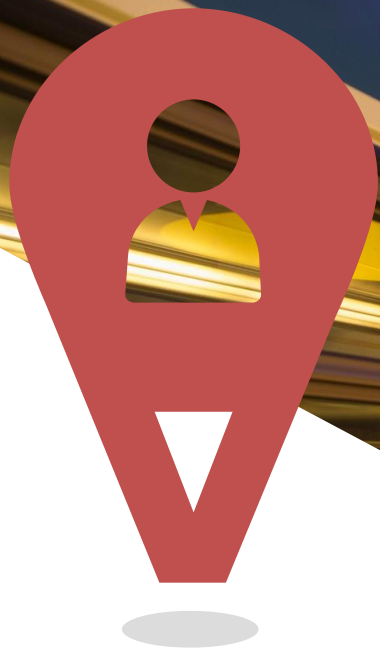


Intelligent Enterprise



Workforce Reimagined





The Internet of Me:

Our world, personalized.



Internet of Me

Placing the end user at the center of every digital experience through delivering highly personalized experiences

- Experience matters most
- Beyond mobility
- Rising consumer demand
- Contextual experiences
- Personalization everywhere





Outcome Economy:

Hardware producing hard results.



Outcome Economy

Enabling a new business models that focus on creating value by delivering quantifiable results through the Internet of Things (IoT)

- Hardware is approachable
- M2M economics
- Sensor efficiency
- M2M standards
- Ubiquitous bandwidth





Platform (R)evolution:

Defining ecosystems, redefining industries.



Platform Revolution

Deploying digital platform strategies to improve collaboration and stay ahead of the game in the 'we' economy

- Digital outpacing GNP
- Rise of platform-based companies
- Digital disruption
- Cloud economics
- Everyone's playing field
- Power of APIs





Intelligent Enterprise:

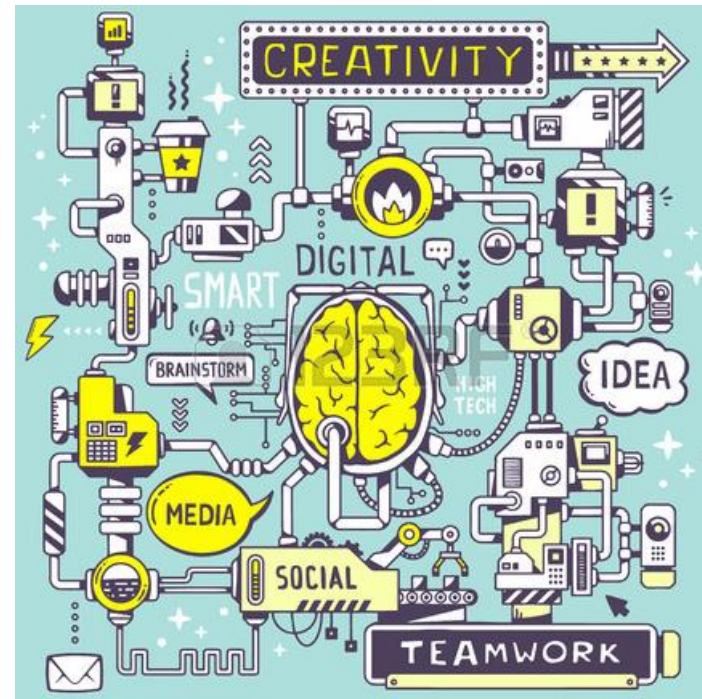
**Huge data, smarter systems—
better business.**



Intelligent Enterprise

Enabling the enterprise by leveraging analytical and cognitive technologies to turn data into actionable insights

- Rising digital complexity
- Unprecedented data volumes
- Decreasing cost of storage
- Virtually unlimited compute power
- Advances in data science





Workforce Reimagined:

Collaboration at the intersection of humans and machines.



- Maturing technology.
- Human-like interactions
- Fast ROI
- Improved efficiency
- Important use cases such as worker safety



Disney's integrated park experience with all-in-one-band

Disney's MagicBand is an all-in-one device on the wrist that helps connects with park goes to all the vacation choices that they have made online with My Disney Experience. Can be used to:

- Enter a Disney Resort hotel room
- Buy food and merchandise
- Enter Walt Disney theme parks
- Provide FastPass+ access to all the experiences Connect to Disney's PhotoPass



Tesco's face-scanning digital signage providing tailored on-screen content

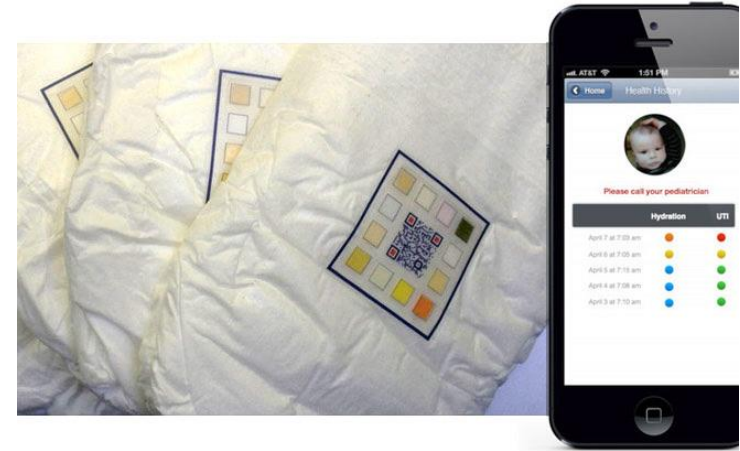
Tesco is rolling out face scanning digital signage at all 450 of its UK petrol stations to tailor engaging and on-screen content to the audience of five million-plus adults who pass through its stations each week.

OptimEyes, the face detection system used, is able to identify and measure characteristics of petrol station visitors to create a more complete target audience profile for advertisers



Pixie Scientific's smart diapers

Pixie Scientific has developed smart diapers that analyze patients' urine to check hydration levels, potential kidney issues and identify signs of urinary tract infections (UTIs). Diaper data is then sent to a caregiver's smartphone after by scanning a QR code on the front of the diaper.

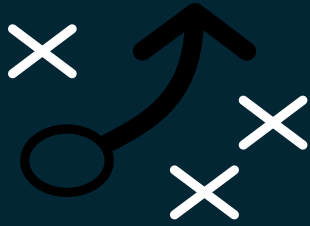


A future with no regrets

Being a digital business means adopting new ways of behaving and operating.

Ask yourself:

- ✓ Where could you partner and acquire any 'missing' capabilities if building them organically is unlikely to happen fast enough?
- ✓ Have you identified your organisation's most digitally savvy employees (often the youngest and most junior) who can help drive transformation?
- ✓ Do you understand how your customers rate their experiences against their expectations – and how does your company compare with your competitors?
- ✓ Do you have the right digital team, unconstrained by traditional behaviours, that has a dynamic and innovative mindset to identify upcoming opportunities?
- ✓ Have you explored at least one potential venture that could seriously hurt your business tomorrow?



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