

The new *economic* indicator

Innovating Thailand
19 September 2017



The new normal



Micro moment





I-want-to-know moments

65%

of online consumers look up more information online now versus a few years ago.²

66%

of smartphone users turn to their phones to look up something they saw in a TV commercial.³



I-want-to-go moments

2X

increase in "near me" search interest in the past year.⁴

82%

of smartphone users use a search engine when looking for a local business.⁵



I-want-to-do moments

91%

of smartphone users turn to their phones for ideas while doing a task.⁶

100M+

hours of "how-to" content have been watched on YouTube so far this year.⁷



I-want-to-buy moments

82%

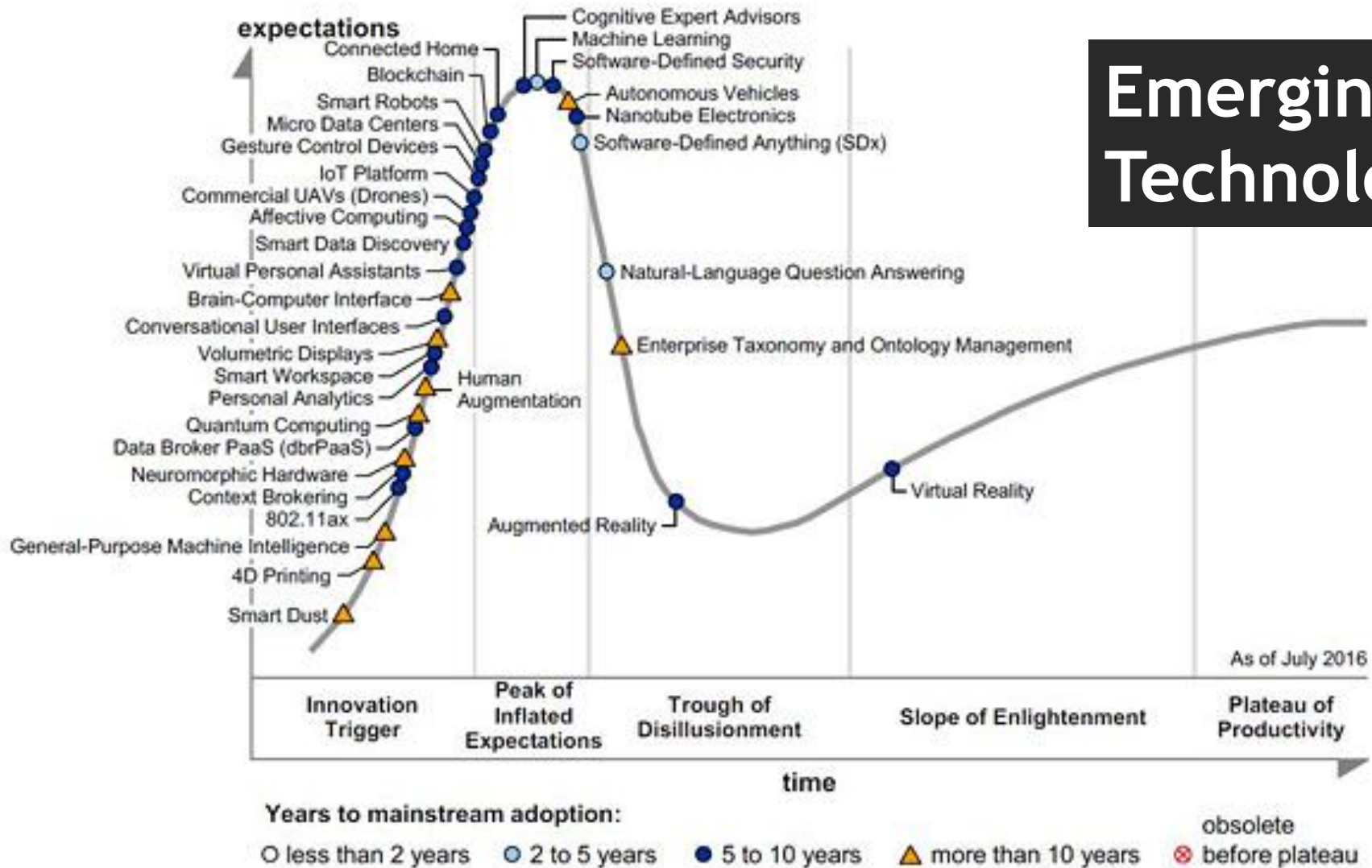
of smartphone users consult their phones while in a store deciding what to buy.⁸

29%

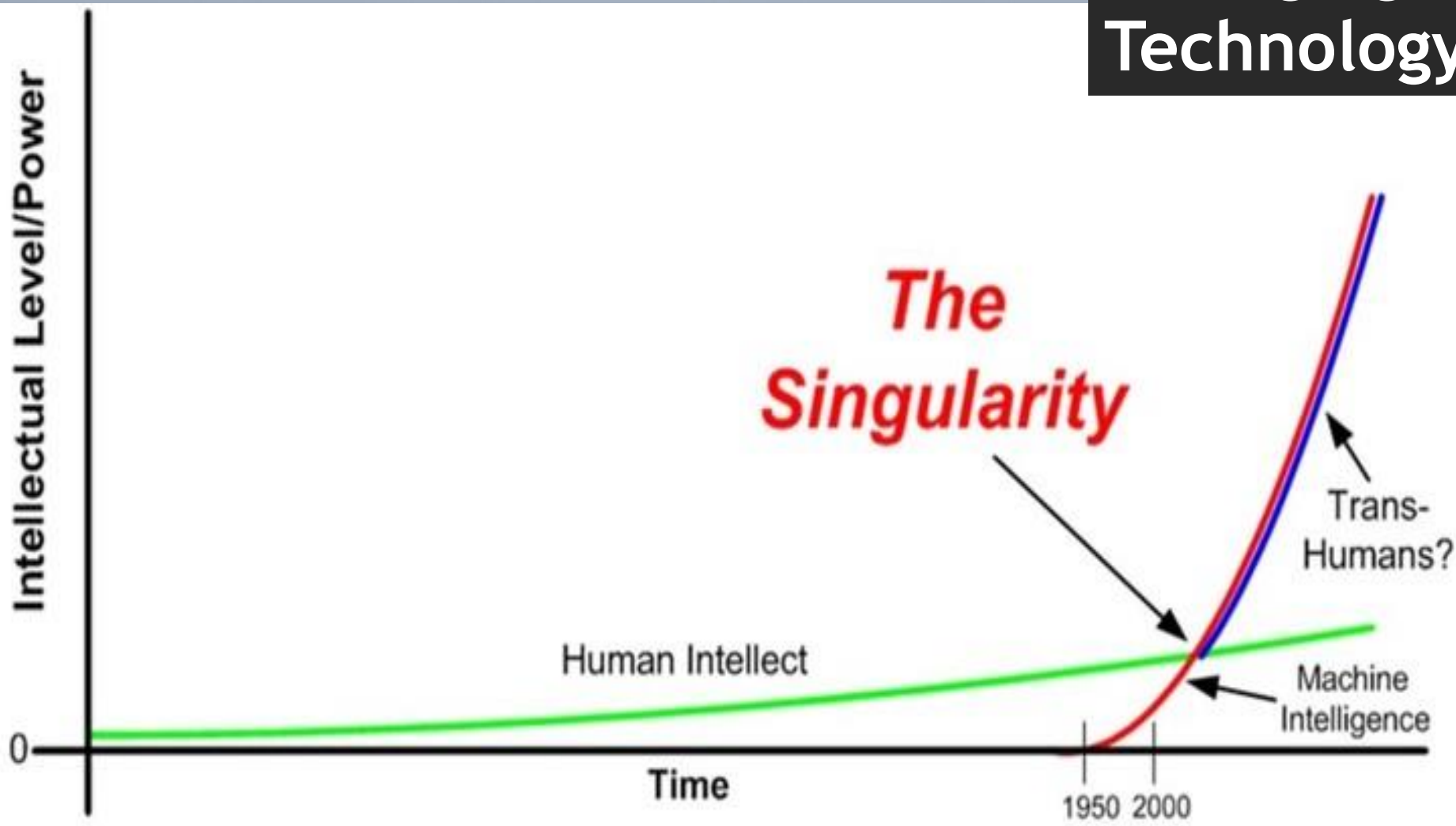
increase in mobile conversion rates in the past year.⁹

We call these **micro-moments**. They're the moments when you turn to a device—often your smartphone—to take action on whatever you need or want right now. They're the **I-want-to-know**, **I-want-to-go**, **I-want-to-buy**, and **I-want-to-do** moments that are loaded with intent, context, and immediacy.

Emerging Technology

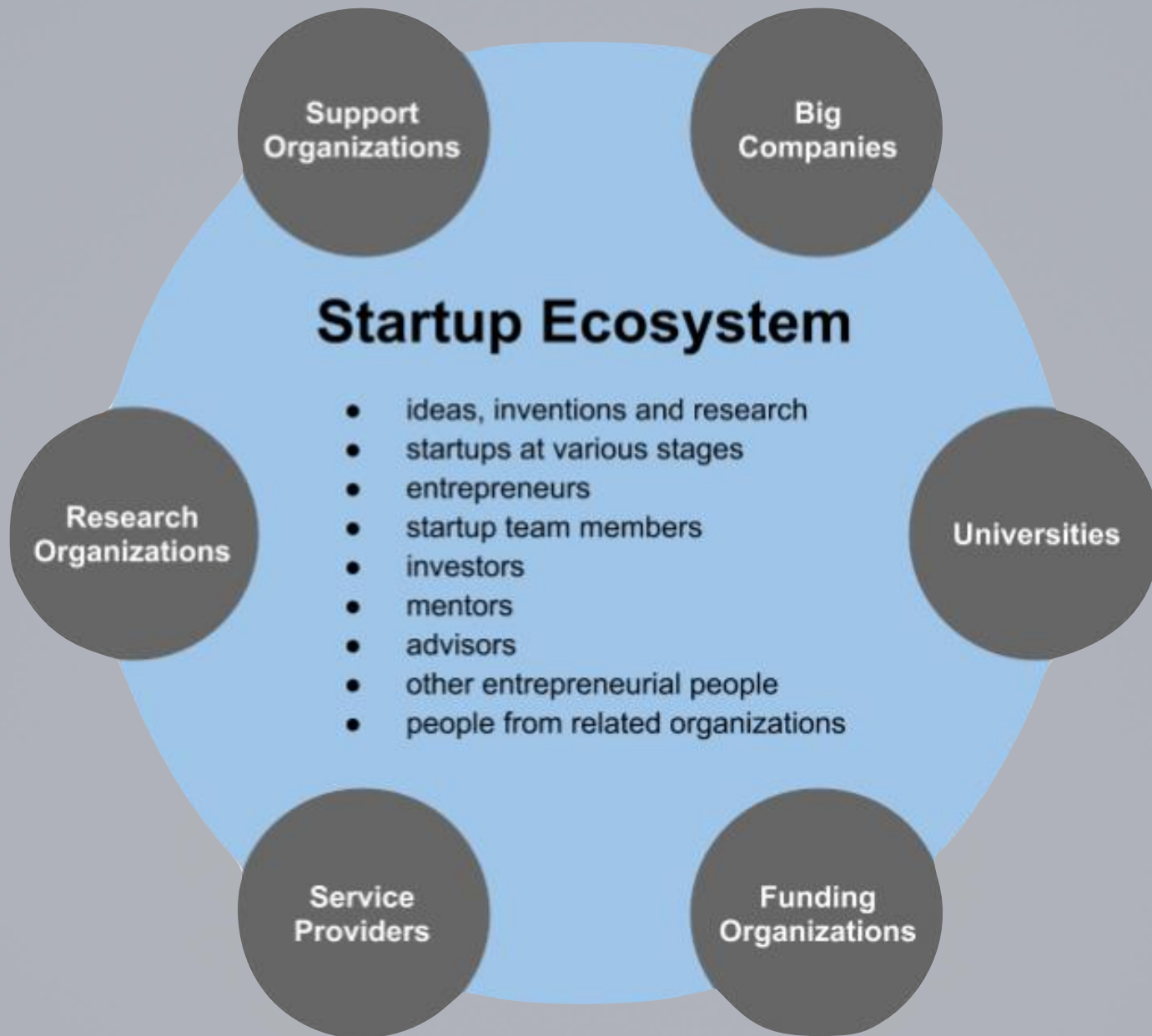


Emerging Technology



Tech Startup

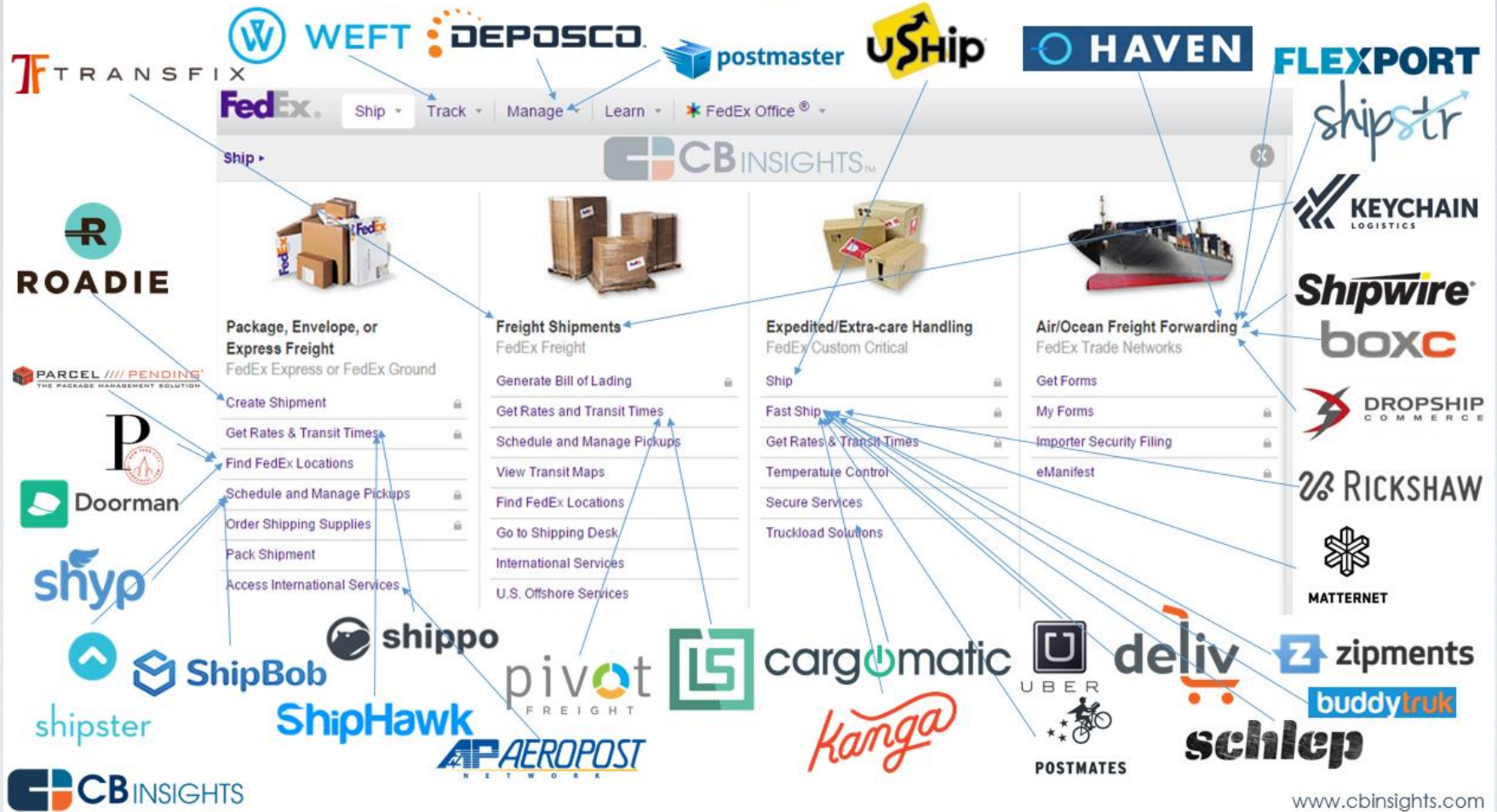




Unbundling of a Bank



Unbundling FedEx



Unbundling of a European Bank

Logos and Services:

- Saving Global
- borro
- Bondora
- Zopa
- LENDING WORKS
- prêt d'union
- Lendico
- fruitful
- LANDBAY
- Property Partner
- wonga
- Spotcap
- Funding Circle
- FINEXKAP
- fleximize
- iwoca
- capiota
- HOLVI
- Trade River
- Ebury
- Lydia
- jusp
- ensygnio
- payleven
- CBINSIGHTS
- Squirrel
- nutmeg
- wikifolio
- eToro
- tink
- CAPITAL
- Money Dashboard
- moni
- transferGo
- worldremit
- azimo
- CurrencyFair
- Klarna
- adyen
- sum up
- iZettle
- BILLPAY
- GOCARDLESS
- PAYMILL

HSBC Website Content:

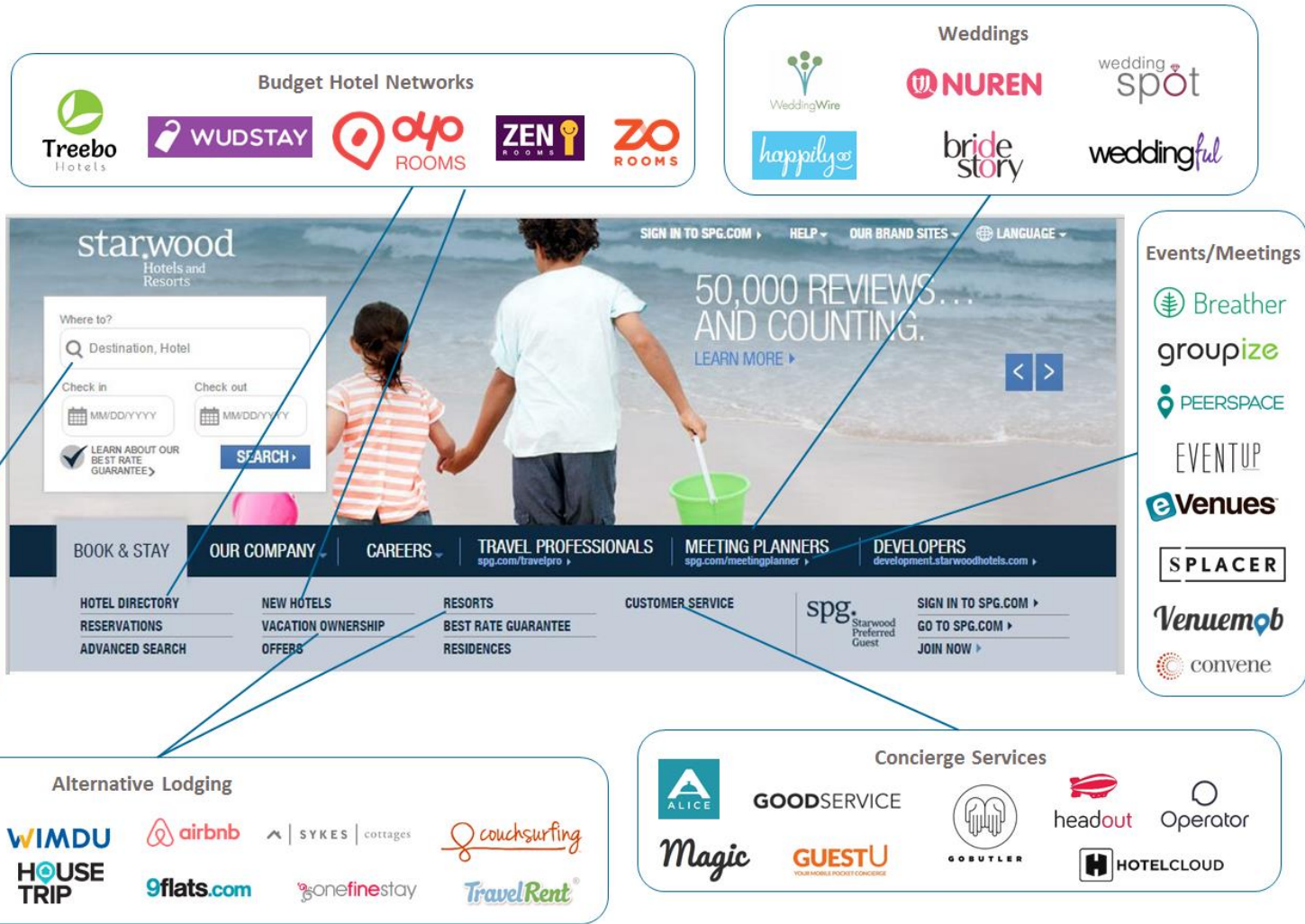
- Personal | Business**
- Search**
- Internet Banking** | **Log on** | **Register**
- Everyday banking** | **Borrowing** | **Investing** | **Insurance** | **Planning**
- Accounts & services | Loans & mortgages | Products & analysis | Property & family | for now & the future
- Send money overseas in a few clicks**
- It's secure, quick and easy. See just how much we could save you.
- Fees may apply. Payments may also incur agency and/or beneficiary bank fees.
- Find out more**
- Find a mortgage** | **Our lowest ever loan rate** | **Save Together offer** | **International money transfer**
- LendInvest** | **auxmoney** | **the currency cloud** | **lendstar** | **TransferWise**
- HSBC United Kingdom | **Search**
- Personal** | **Business**
- Business Banking Turnover up to £2m | Commercial Banking Turnover £2m to £30m | Corporate Banking Turnover in excess of £30m | International Business | Online Services
- Business Home > Business Banking
- CBINSIGHTS** | **About Business Internet Banking** | **LOG ON**
- Every business has its own story**
- We create different business bank accounts to suit different needs
- Discover products and services for your banking needs**
- Community account | Other accounts | Finance & borrowing | Credit cards & debit cards | Payment services
- Business insurance policies | Business savings & investments | Ways to Bank | International business | Pensions
- Get in touch**
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- Retrieve an online application you have already started

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Startups That Are Unbundling The Hotel



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Unbundling Procter & Gamble



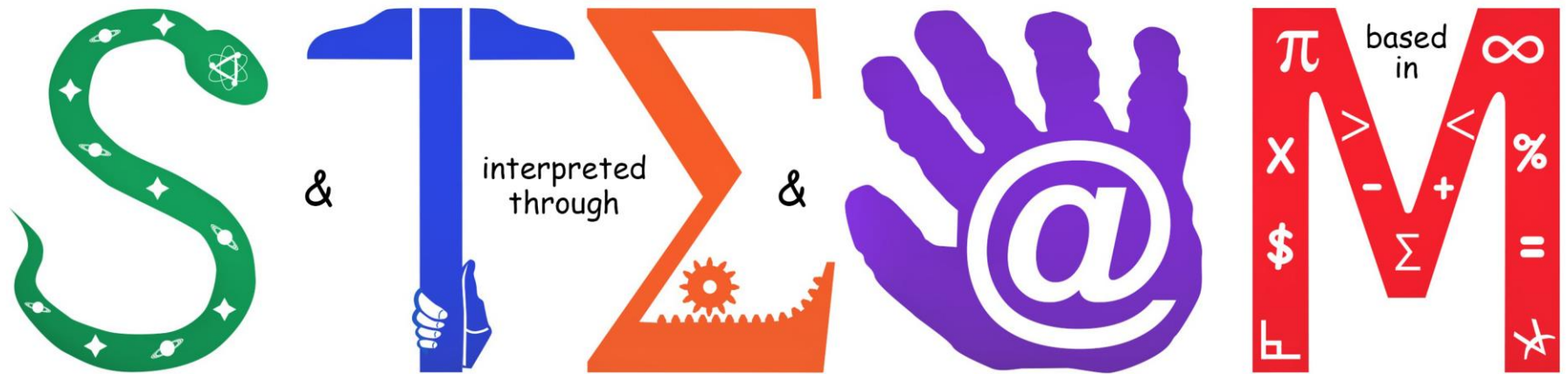
Digital Giant



ECONOMIC & TECH ECOSYSTEM COMPARISON

					
	ISRAEL	USA	CHINA	SINGAPORE	THAILAND
ECONOMIC					
POPULATION	8.7 MM	325 MM	1,374 MM	5.6 MM	68.3 MM
2016 GDP (US\$ PPP)	\$316 BN	\$18,600 BN	\$23,200 BN	\$508 BN	\$1,152 BN
2016 GDP/CAPITA (US\$)	\$36,300	\$57,100	\$16,885	\$90,700	\$16,900
TERTIARY EDUCATION (% WORKING AGE POP)	44.2%	40.9%	7.7%	29.0%	11.9%
CIVILIAN R&D SPENDING (% OF GDP)	4.25%	2.79%	2.07%	2.19%	0.39%
2015 PATENT APPLICATIONS	1,685	57,100	29,800	908	133
CIVILIAN R&D SPEND/PATENT APP (US\$)	\$8.0MM	\$9.1MM	\$16.0 MM	\$12.3 MM	\$33.8 MM
STARTUP ECOSYSTEM					
STARTUPS	~4,500	~140,000	~145,000	~2,000	~600
STARTUP DENSITY (STARTUPS:POP)	1 PER 1,900	1 PER 2,300	1 PER 9,500	1 PER 2,800	1 PER 113,000
VC FUNDS	~70	~800	~1,000	~50	12
2016 VC INVESTMENT (US\$)	\$4,800 MM	\$69,100 MM	\$32,000 MM	\$3,500 MM	\$86 MM
2016 VC INVESTMENT/CAPITA (US\$)	\$550	\$212	\$23	\$625	\$1.3
STARTUP ACCELERATORS	260	200	1,600	52	7
STARTUPS PER ACCELERATOR	17 : 1	700 : 1	90 : 1	38 : 1	86 : 1
2016 TECH EXITS	104	3,358	221	15	2
EXITS AS % OF # STARTUPS	2.3%	2.4%	0.2%	0.8%	0.3%

Sources: OECD, World Bank, World Economic Forum "Human Capital Report", World Intellectual Property Organization, Israel government, PwC, Forbes, Startup Grind, Startup Genome, Inc. Magazine, Fintech News, Techsauce, Straits Times, Golden Gate Ventures, Digital Ventures analysis



Science

the natural universe,
where everything
comes from

Technology

tools & innovative
devices, uses &
enhanced abilities

Engineering

purposeful innovation,
creation & analysis

Arts

humanities,
ethics, ideals
& expression

Mathematics

fact organizing
base language

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千里之行，始於足下

The journey of a
thousand miles
begins with one step

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Tao Te Ching, chapter 64