



THE IMPACT OF INNOVATION



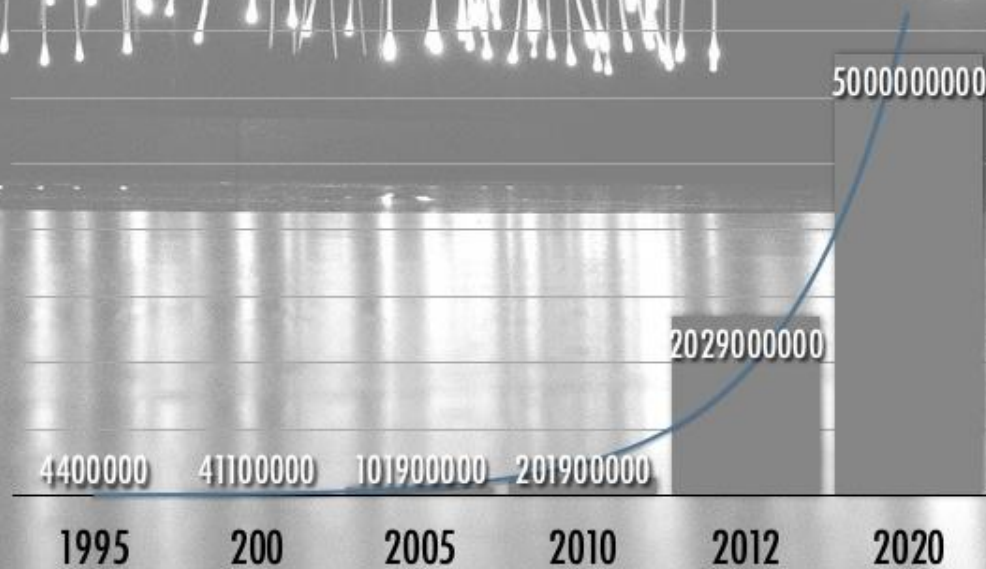
**WHAT DRIVES
HUMANS?**

HOPE & FEAR



DISRUPTION

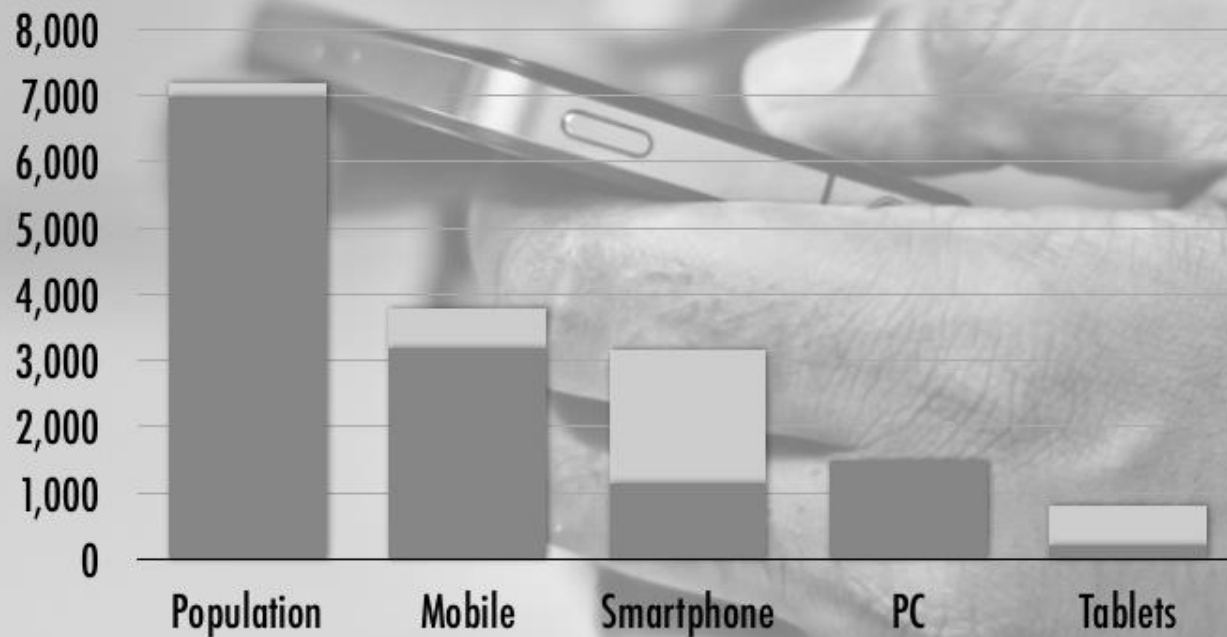
PEOPLE ONLINE



MASS SCALE

■ 2012

■ 2017



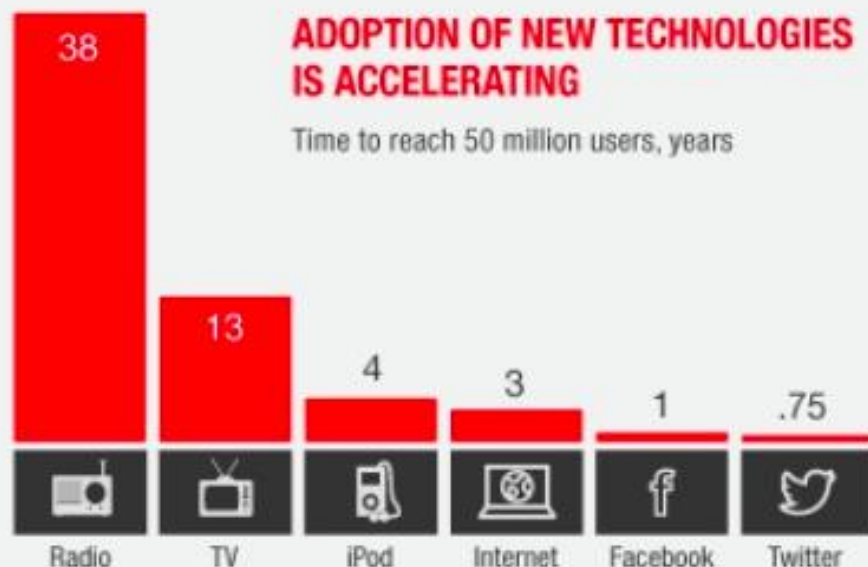
1 trillion objects expected to connect to the Internet by 2025



GLOBALIZATION AND TECHNOLOGY ARE CHANGING THE FACE OF THE BUSINESS WORLD

ADOPTION OF NEW TECHNOLOGIES IS ACCELERATING

Time to reach 50 million users, years



TECHNOLOGICAL BREAKTHROUGHS ARE SPEEDING UP

The path toward mobile Internet



DISRUPTIVE TECHNOLOGIES TO WATCH

Estimated potential economic impact by 2025 across sized applications¹



Mobile Internet
\$4 trillion–\$11 trillion

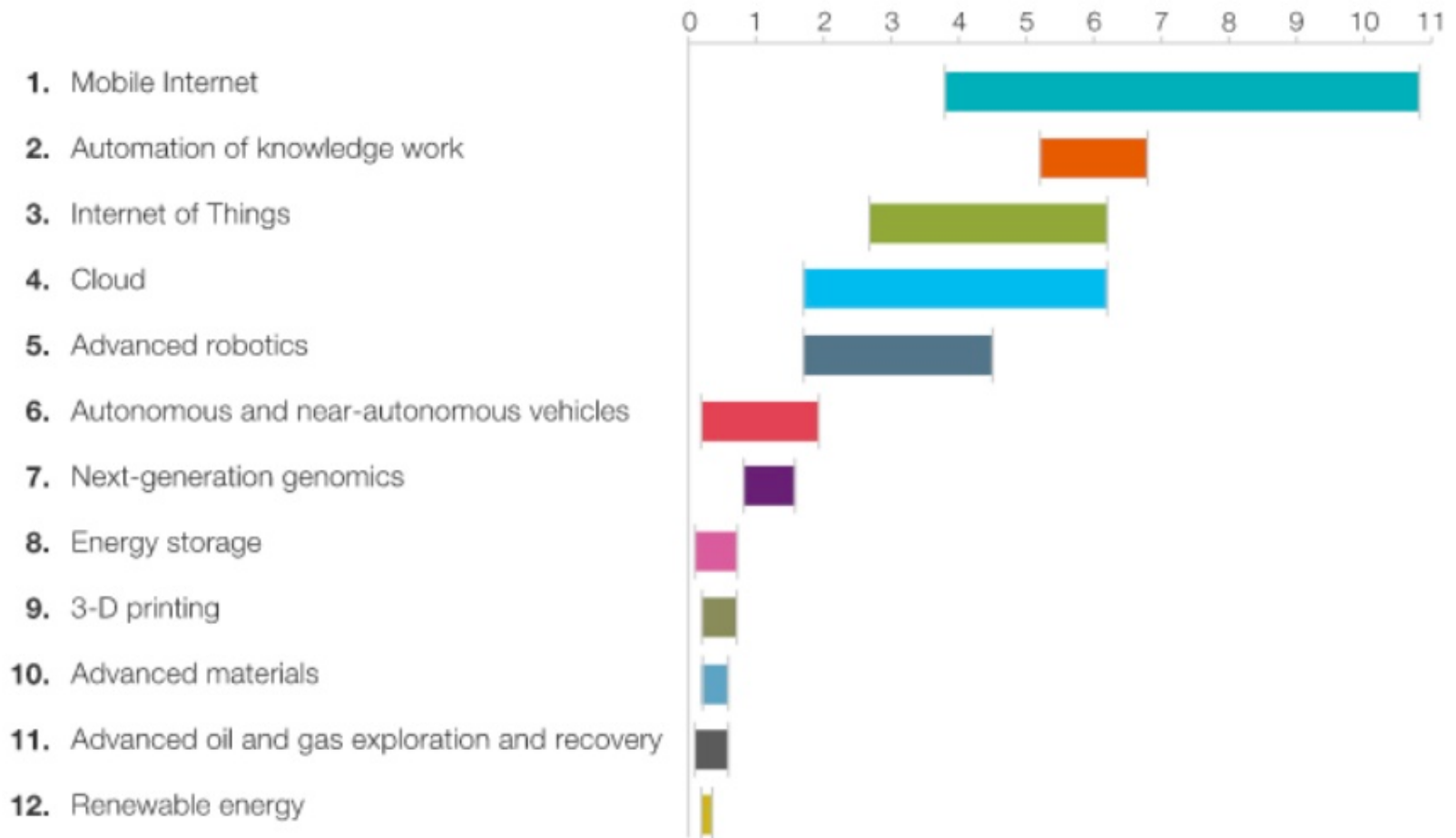


Automation of knowledge work
\$5 trillion–\$7 trillion



Internet of Things
\$3 trillion–\$6 trillion

Estimated potential economic impact of technologies across sized applications in 2025, \$ trillion, annual



SOURCE: McKinsey Global Institute



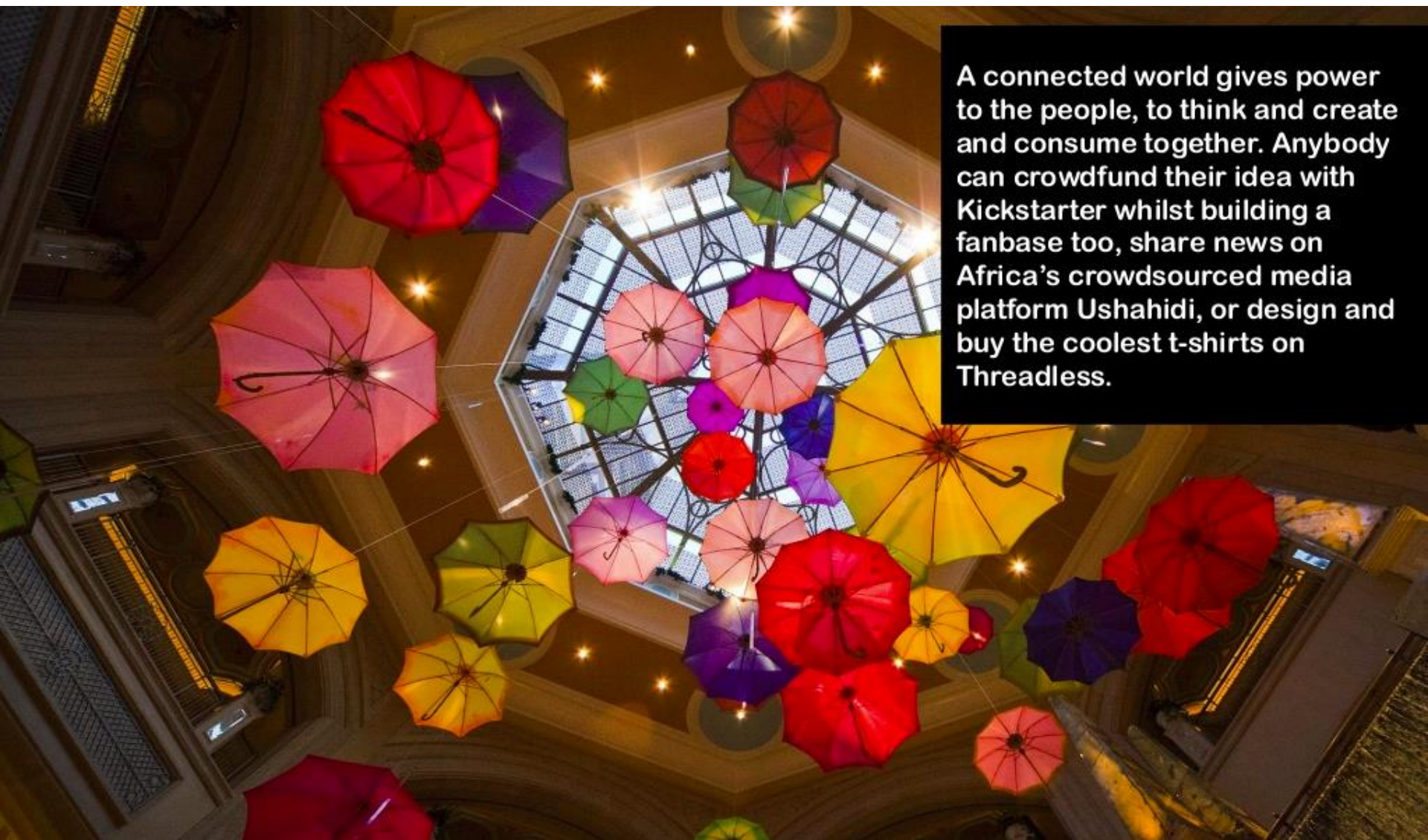
Most transactions are individual, most products can be lonely, but sharing is more fun and efficient. Airbnb, the rent a spare room brand, now has more rooms than Hilton hotels. Patients Like Me has become the place to go to share your fears and experiences about any health condition.

Rental and subscription models can be applied to every industry, reducing the amount of products we hoard when we don't need them. Zipcars started the trend against car ownership with a membership plus pay per use model; whilst Azuri Tech has transformed access to power in Africa by renting solar panels for \$1 per week, allowing anyone to recharge that most vital asset, their mobile phone.





Perhaps the most talked about trend of all, within the next year 50 billion devices will be connected, many of them invisible to your eye, sensors knitted into fabrics and flashing buzzing around your wrist. Apple Watch might be a must have, but health sensors like Scanadu will be most significant in staying healthy.



A connected world gives power to the people, to think and create and consume together. Anybody can crowdfund their idea with Kickstarter whilst building a fanbase too, share news on Africa's crowdsourced media platform Ushahidi, or design and buy the coolest t-shirts on Threadless.

Our lives are increasingly optimized by technology, from lighting to heating, entertainment and banking. Nest, the intelligent home thermostat, has led the way in domesticating technology; Witricity, providing electricity without the clutter of wires, will be big in 2015.





“Companies are no longer competing against each other, they are competing against **speed**”. Marc @Benioff