

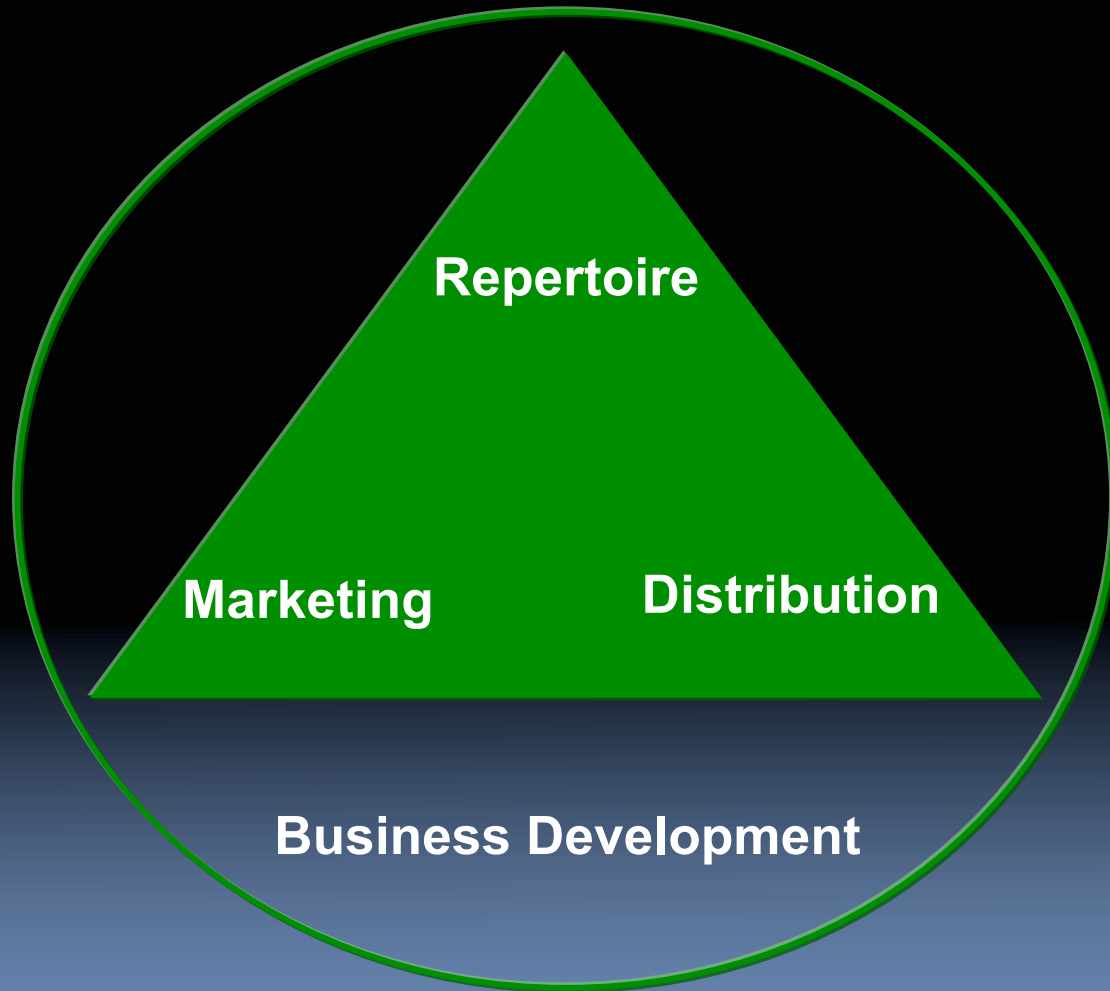


# The (making of the) Future of Digital Media

[scott.dinsdale@sonymusic.com](mailto:scott.dinsdale@sonymusic.com)



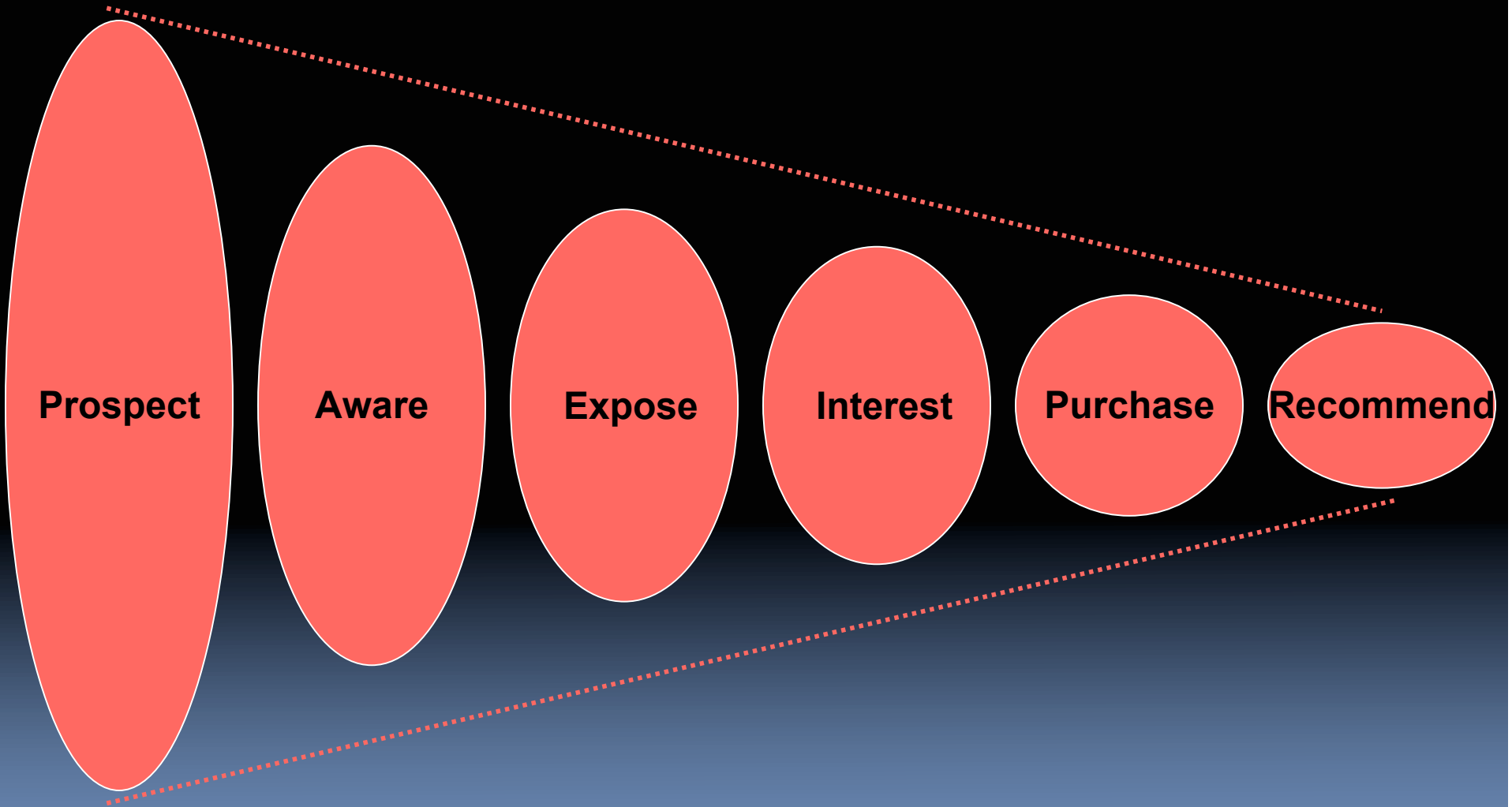
# The Commercial Lens



# The Creative Process

- New tools provoke creative innovation
- Decrease in the cost of production
- Increase in consumer expectations
- Retooling ROI equations
- The creativity debate
- New licensing models

# The Marketers Challenge



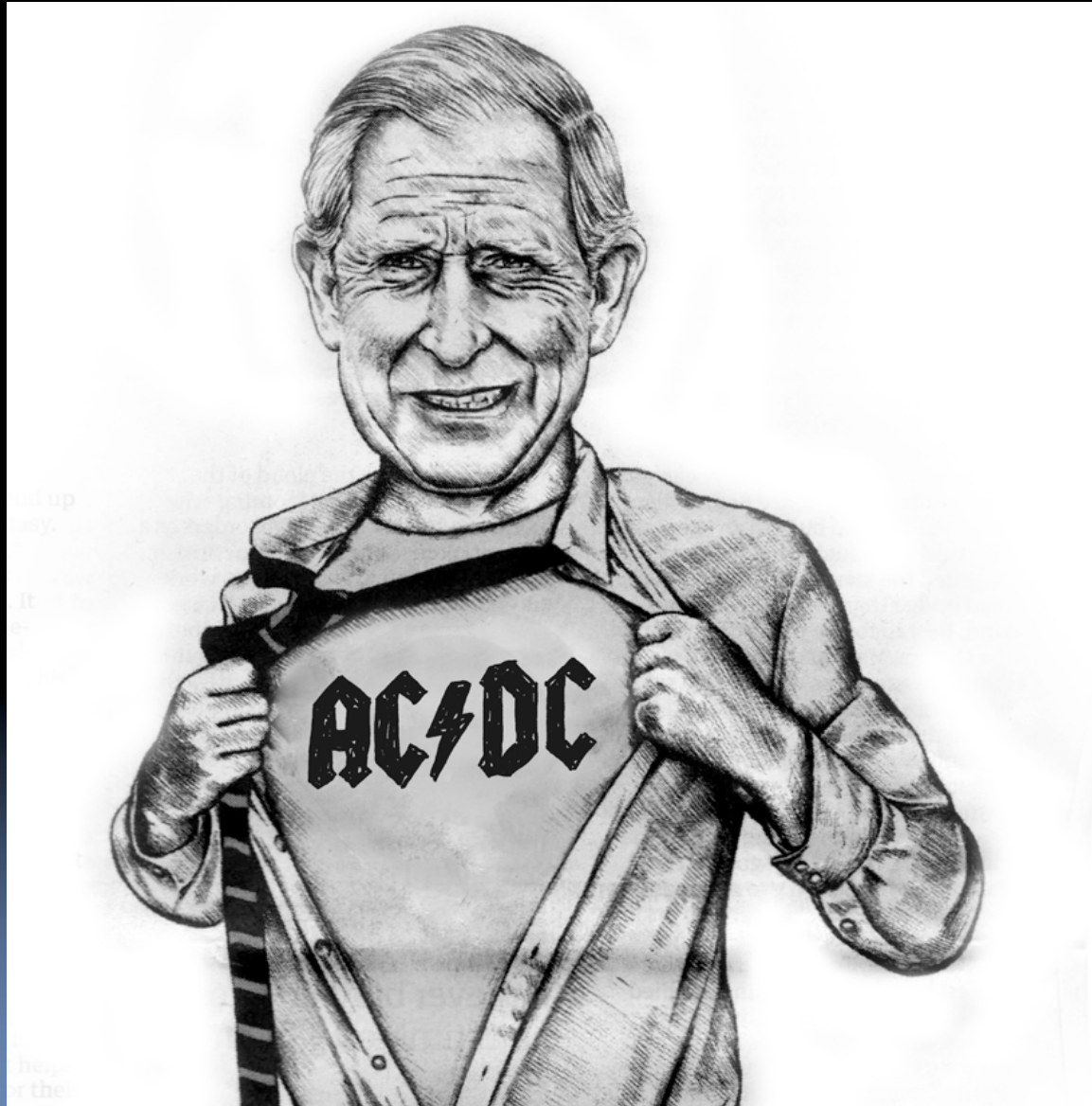
# The Digital Transformation of Media Marketing

- The customer ...
  - As marketer
  - As co-curator
  - As co-creator
- Control freaks beware
- Multi-platform marketing
- Increased visibility and accountability

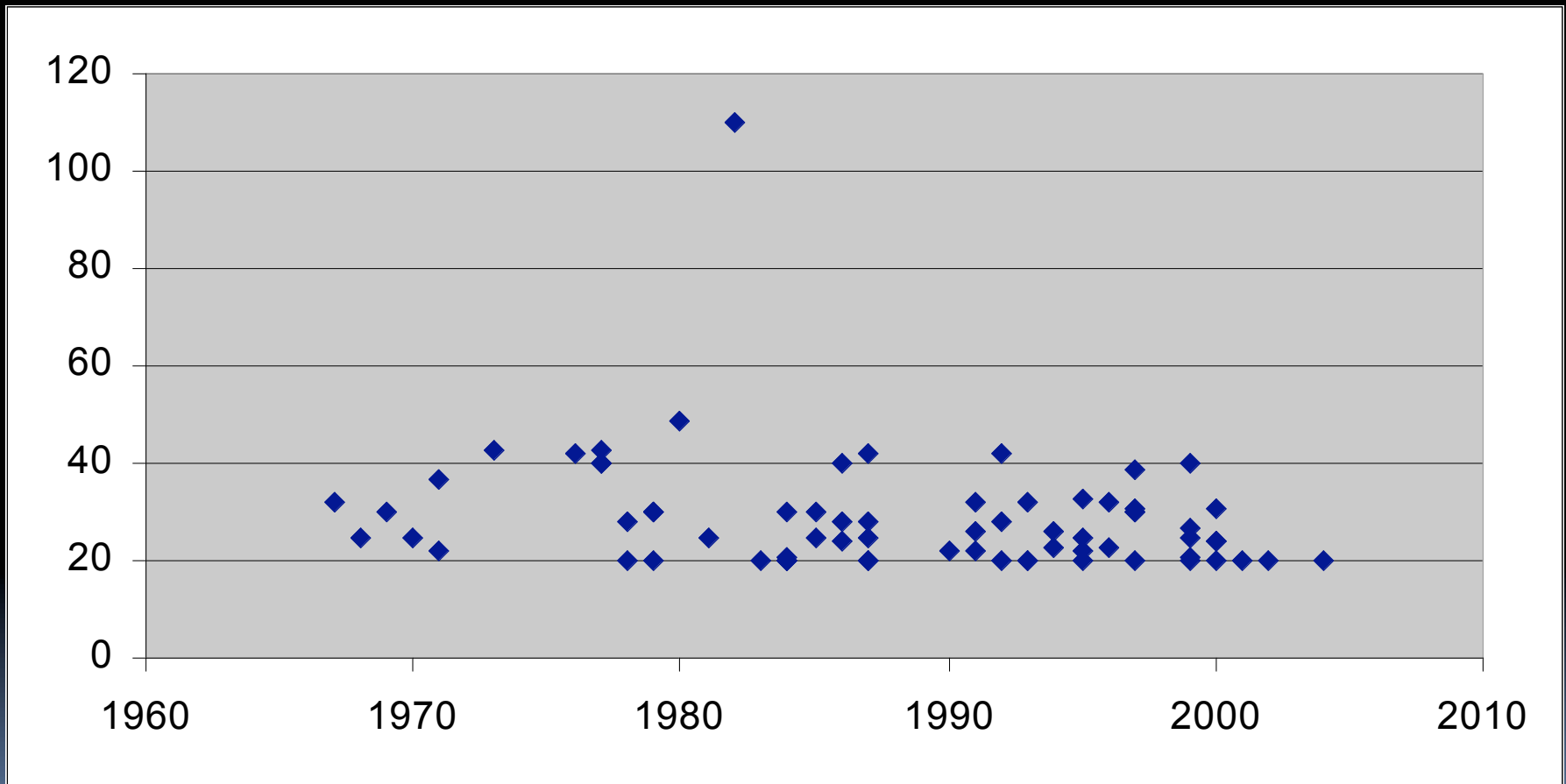
# Share of Wallet & Multi-Tasking Challenges



# Consumer Proximity & Insight



# Distribution: 20+ Million (Music) Sellers



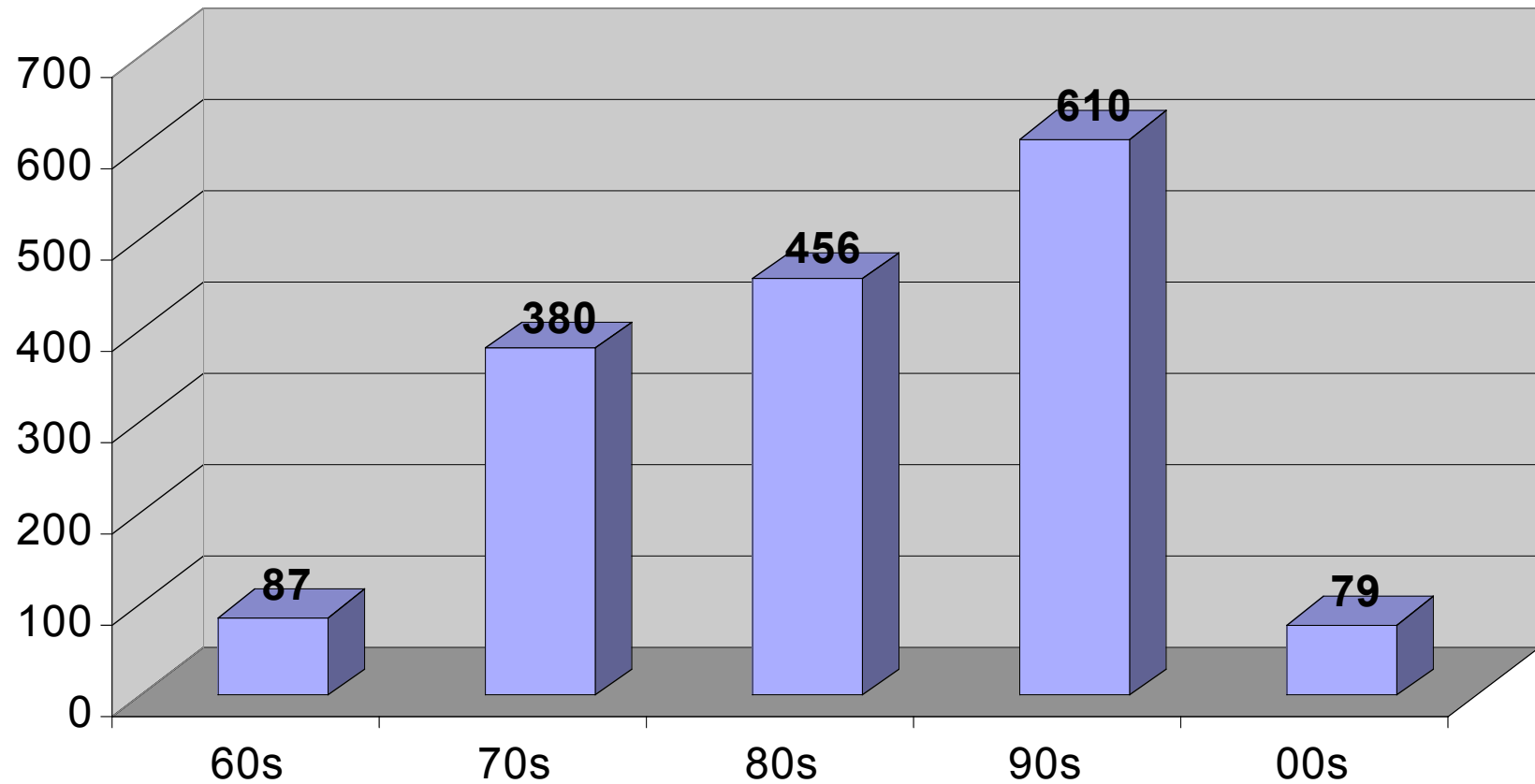


# Piracy vs. The Margin War



- music consumption at an all time high

# Music Top 50 in Sales (x,000,000s) by Decade



- Challenges to funding creativity, especially for emerging talent

# A Premium on Business Development



amazon.com.



lala<sup>beta</sup>

... T-Mobile



Neurotic  
MEDIA



thumbplay

VEVO™



.Dada.



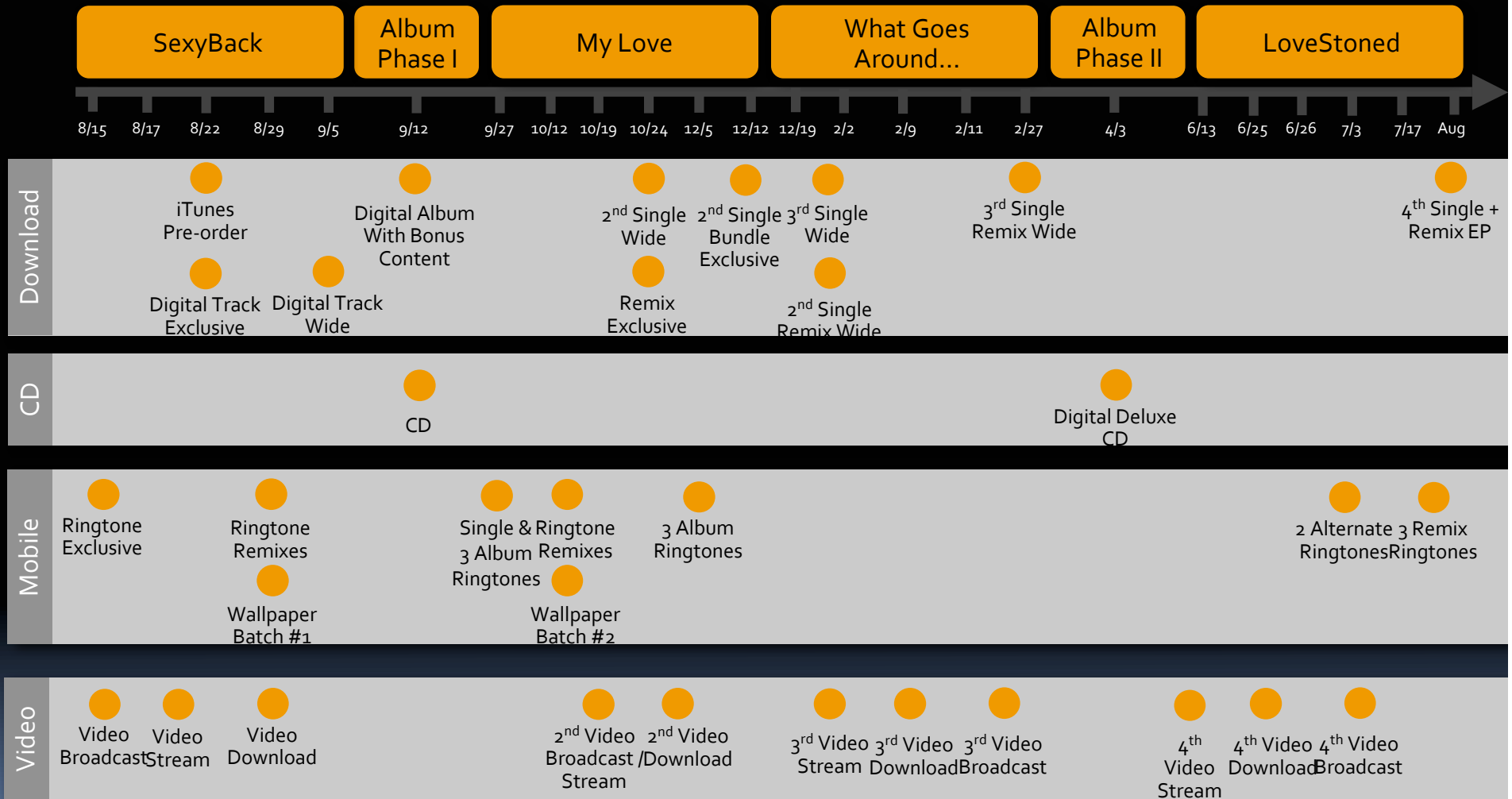
Spotify

You Tube



Google™

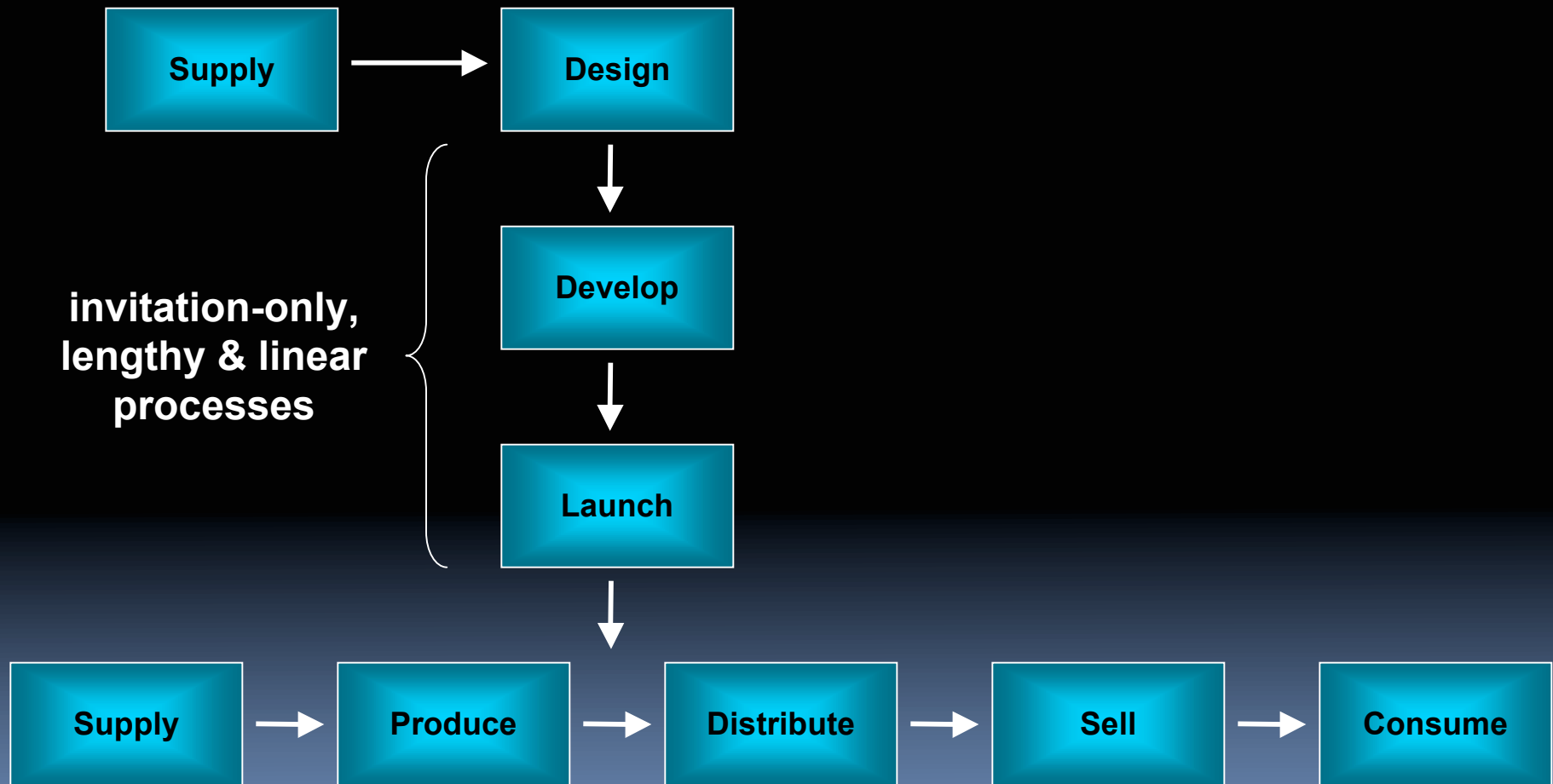
# SKU Proliferation



- New demands on the creative process

# The “Traditional” Media Supply Chain

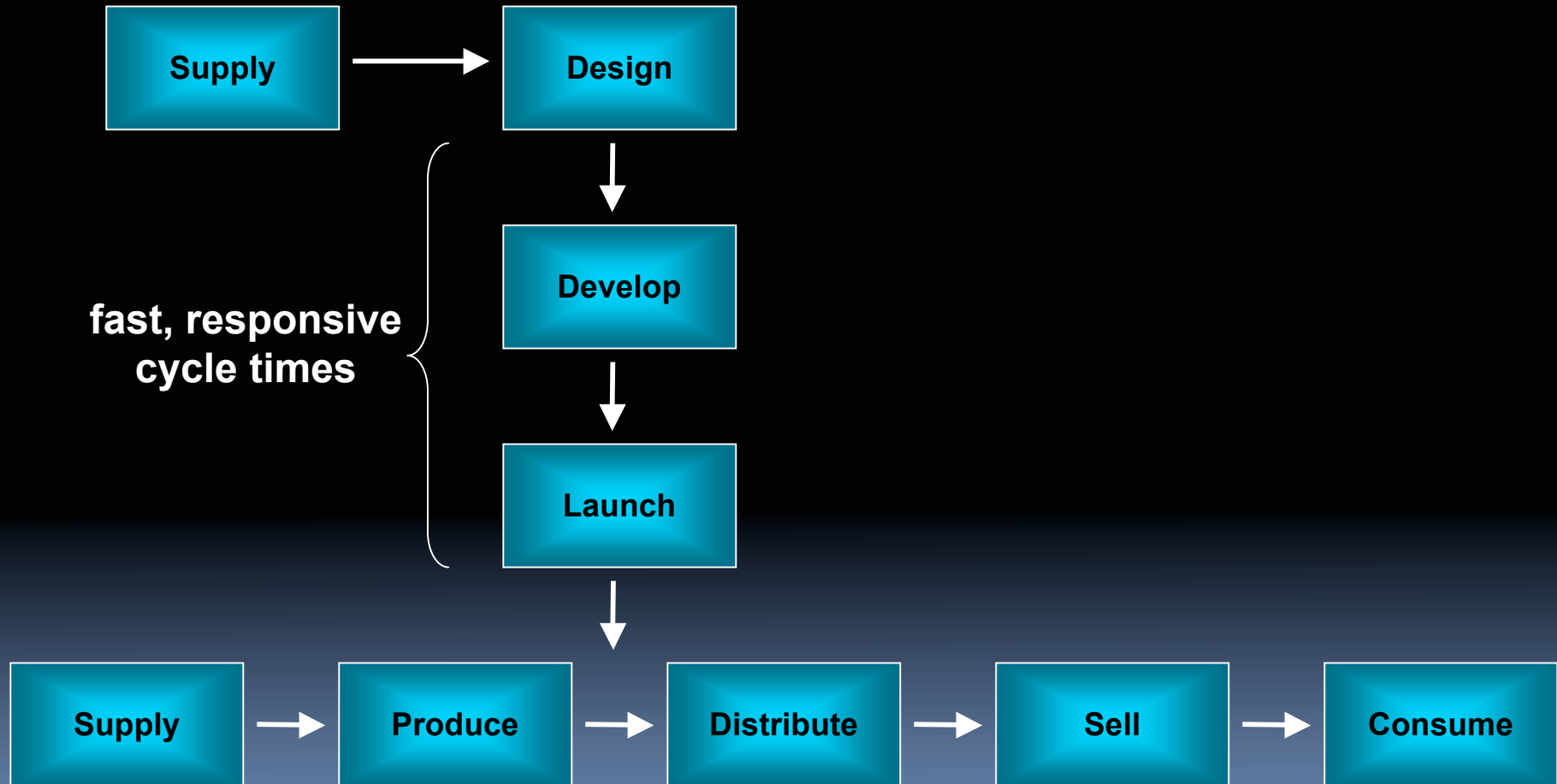
“professional grade”, rigid



scale-driven, high barriers to entry, capital intensive

# Digital Changes (almost) Everything

consumer & tech-driven, accessible

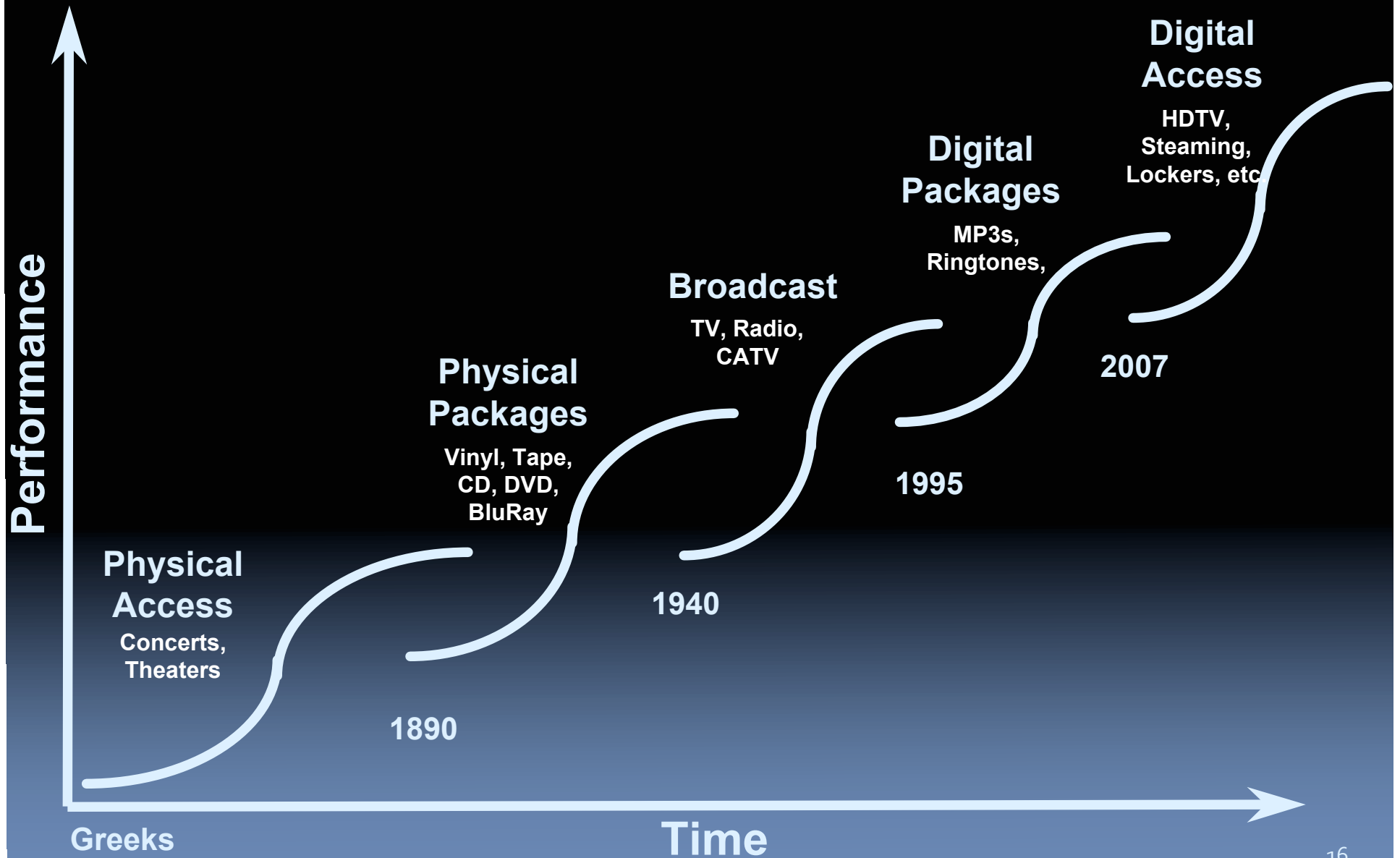


low(er) barriers to entry, global, venture-backed innovation

Here comes the cloud ...

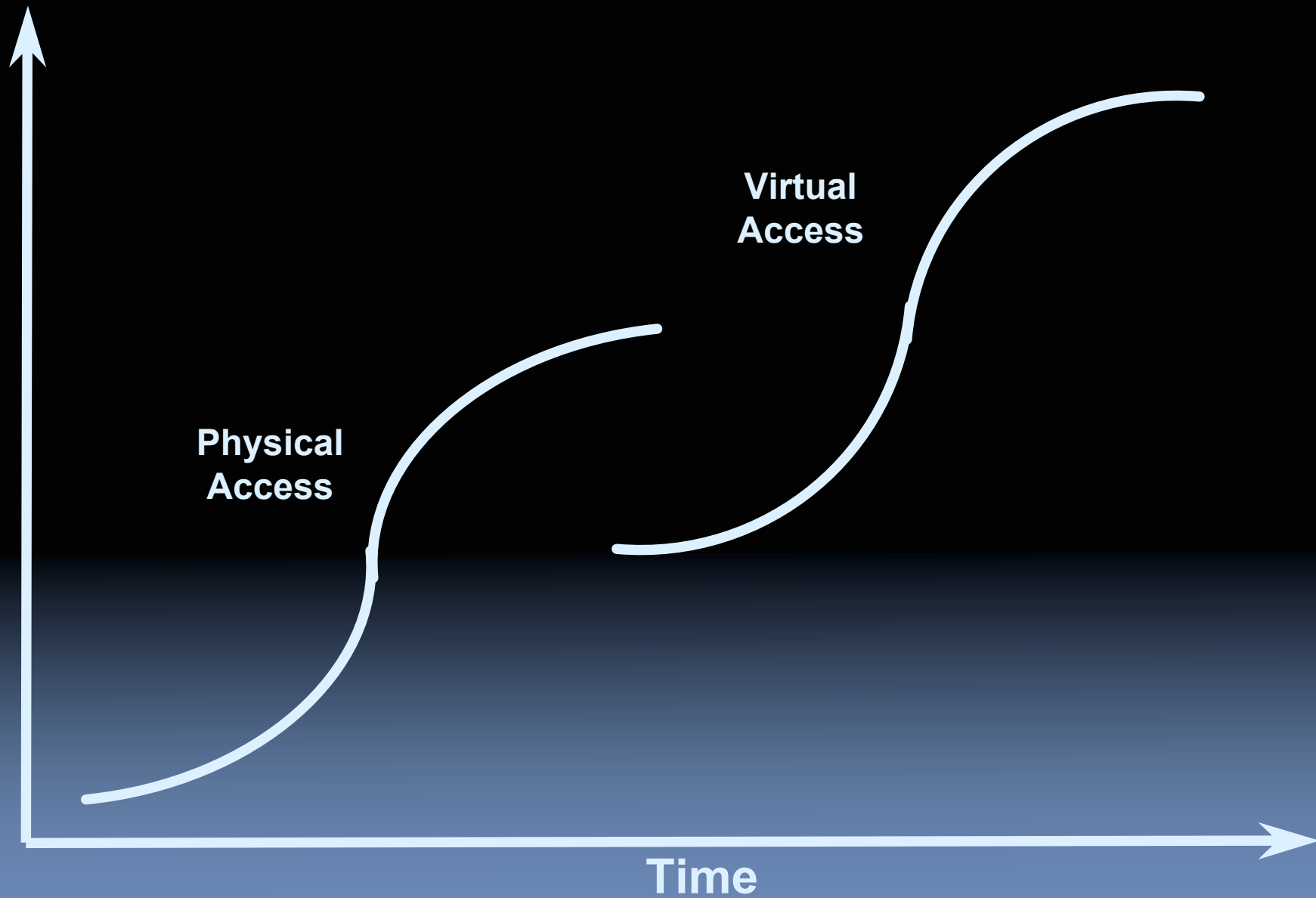


# Transformations in Media Experiences






























# The Future of Media ... in Hindsight?



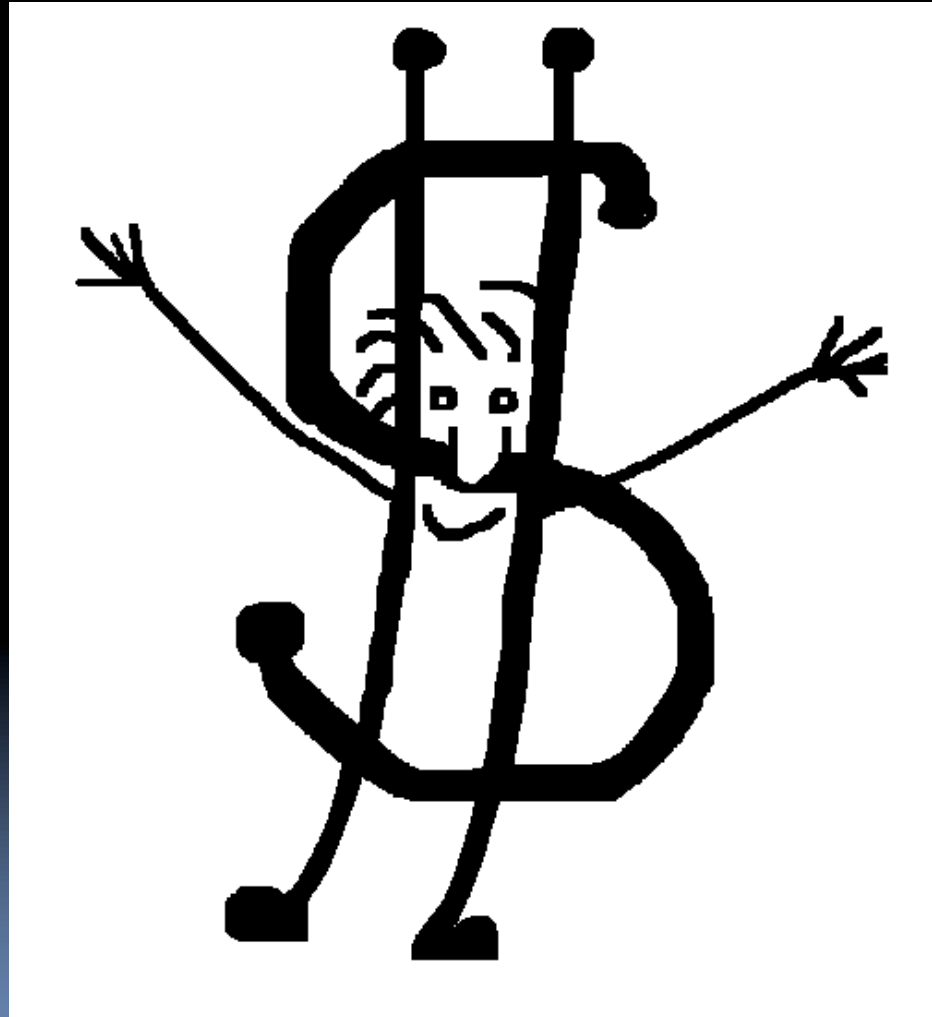
# Access-Driven Platforms



## Top 25 Facebook Games for October 1, 2009

Rank		Game	Monthly Actives	Developer	MAU Change	(Last Month)
1		FarmVille	51,454,512	Zynga	18,015,305	33,439,207
2		Mafia Wars	25,708,764	Zynga	6,988,358	18,720,406
3		Farm Town	18,852,336	Slashkey	553,341	18,298,995
4		Pet Society	18,511,368	Playfish	2,488,589	16,022,779
5		YoVille	17,944,265	Zynga	3,840,024	14,104,241
6		Texas HoldEm Poker	17,780,061	Zynga	2,228,057	15,552,004
7		Restaurant City	15,589,610	Playfish	4,062,132	11,527,478
8		MindJolt Games	15,364,849	MindJolt.com	-1,125,455	16,490,304
9		FARKLE	7,686,696	Viral	N/A	N/A
10		Bejeweled Blitz	7,527,291	PopCap Games	710,103	6,817,188
11		Barn Buddy	7,001,394	TheBroth, Inc.	942,064	6,059,330
12		Sorority Life	6,520,891	Playdom	1,077,730	5,443,161
13		Country Story	6,782,522	Playfish	2,765,744	4,016,778
14		Friends For Sale	6,328,710	Serious Business	1,246,469	5,082,241
15		Bumper Sticker	5,623,822	LinkedIn	277,656	5,346,166
16		Brain Buddies	5,127,043	wooga	1,297,729	3,829,314
17		My Fishbowl	4,496,851	TwoFishes Interactive	N/A	N/A
18		(Lil) Farm Life	4,006,399	Greenpatch Inc	N/A	N/A
19		Vampire Wars	3,749,711	Zynga	601,408	3,148,303
20		Word Challenge	3,631,437	Playfish	151,139	3,480,298
21		Who Has The Biggest Brain	3,343,404	Playfish	-353,207	3,696,611
22		開心農場	3,250,321	ELEX	N/A	N/A
23		GooBox - Jeux Gratuits	3,084,070	Kobojo	N/A	N/A
24		UNO BETA	2,979,034	GameHouse	-186,439	3,165,473
25		Animal Paradise	2,935,611	Rekoo	N/A	N/A

# Virtual Economies



# The Future of Media

