Gerd Leonhard

Futurist, Author, Musician

cend Leonhand

the Future

of contents



oleonhard



Music

Luiu Edition

Gerd Leonhard

@gleonhard



Digital Content and the Future of the Creative Industries

"Lead the Revolution or be the Victim of Evolution"

Tesco CEO Philip Clarke, World Retail Congress 2012 London

Global Warming constitutes the biggest market failure in history

PIRACY. IT'S A CRIME.

of capitalism.











Social-Local-Mobil ie SOLOMO **Cloud-Centric and OTT** Distributed Collaborative Non-linear Decentralized Ecosystems



The content industries are entering a whole new era: Mobile | Local | Social | Cloud

readyh



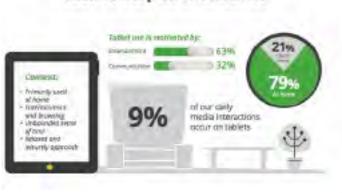
The total convergence of Internet and Television: New Rights Logic needed

Google's view of mobile media :)

TV no longer commands our full attention



Tablets keep us entertained



There are two modes of multi-screening



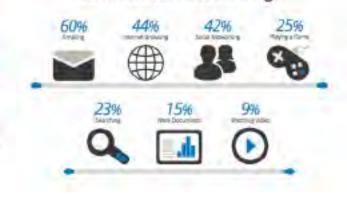
one device simultaneously We use an average of three different screen combinations every day 81%

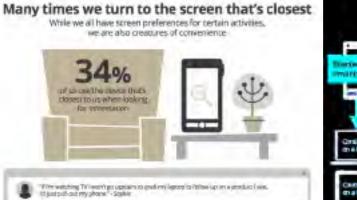
Considences & Tenyore

OWNER HALLOW LOBERTS & THEME

We also multi-screen by using more than

Top activities performed during simultaneous screen usage









Gougle

The New Multi-screen World: Understanding Cross-platform Consumer Behavior



August 2012

Google: replicate traditional media?



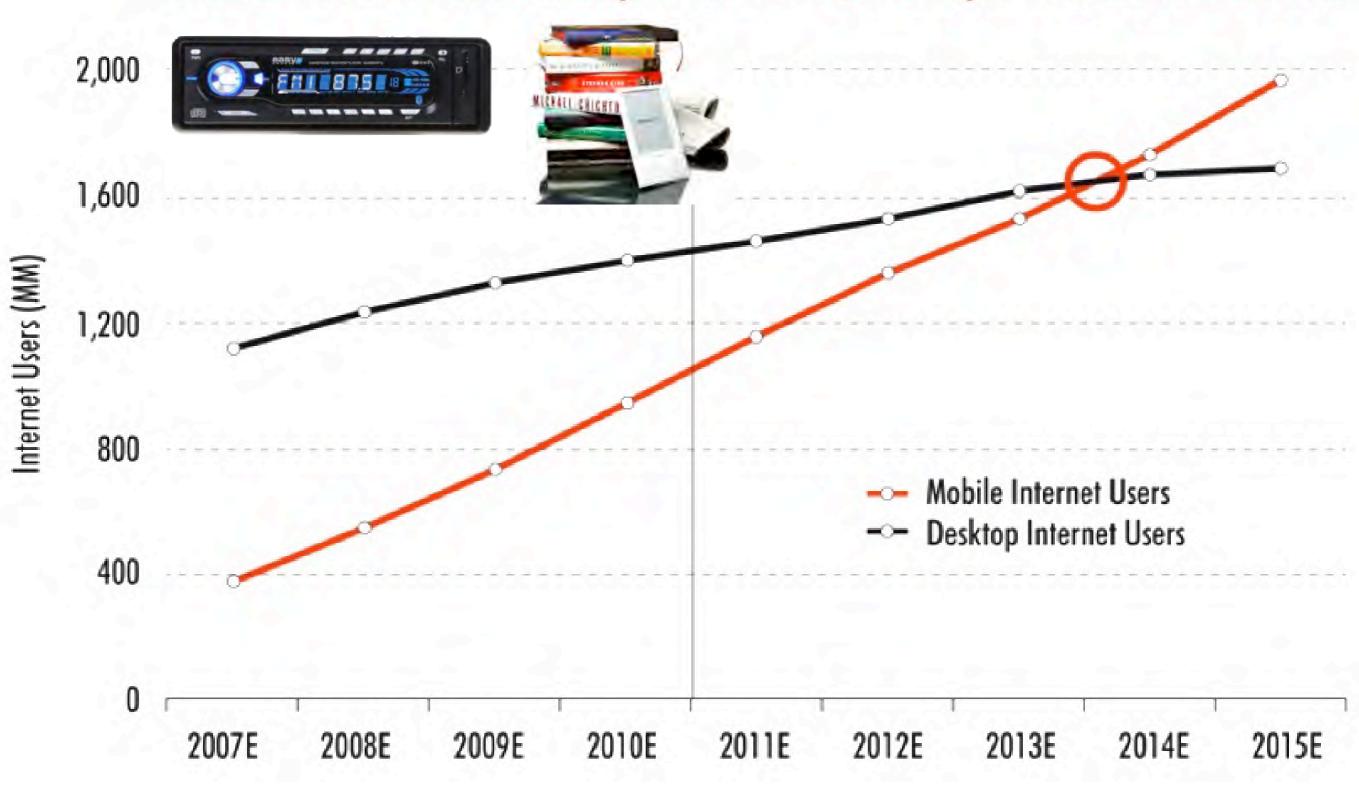






It's all about Mobile. Period.

Global Mobile vs. Desktop Internet User Projection, 2007 - 2015E



2017: 5 Billion people, 75% mobile Internet, 50+ major platforms, a €250 Billion ad market



Amazon Cloud Player for Web & Android



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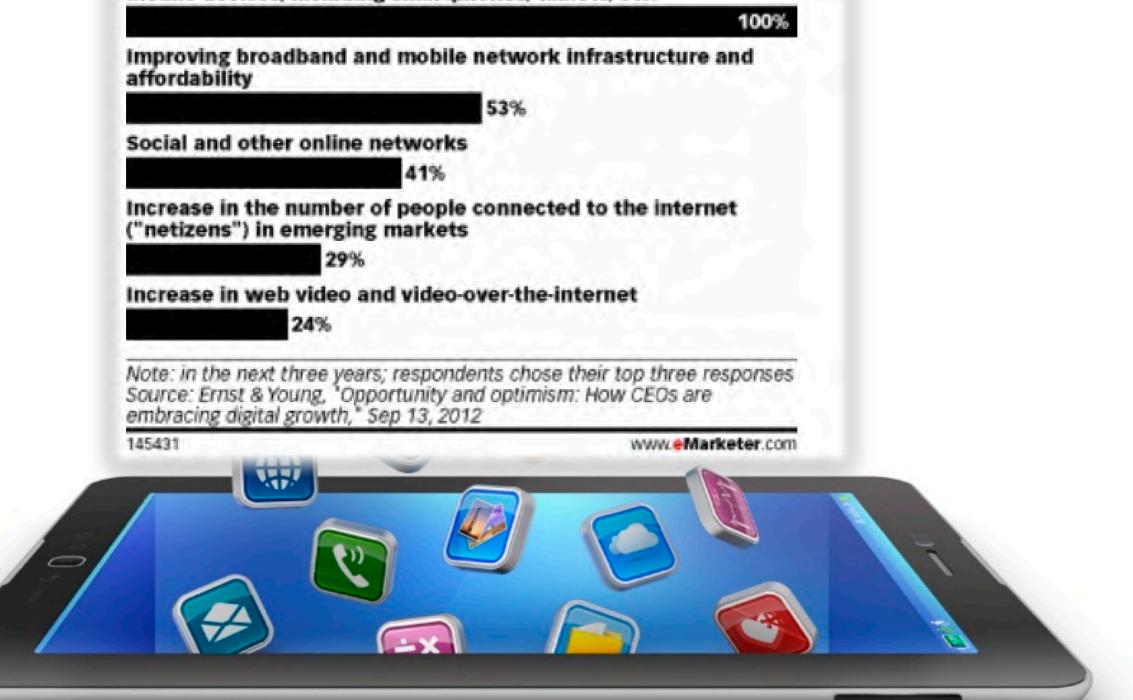
Opportunity

Challenge

Biggest Drivers of Growth in Content Consumption According to Media and Entertainment CEOs Worldwide, 2012

% of respondents

Mobile devices, including smartphones, tablets, etc.





Billions of Recorders and Copy Machines...@

@

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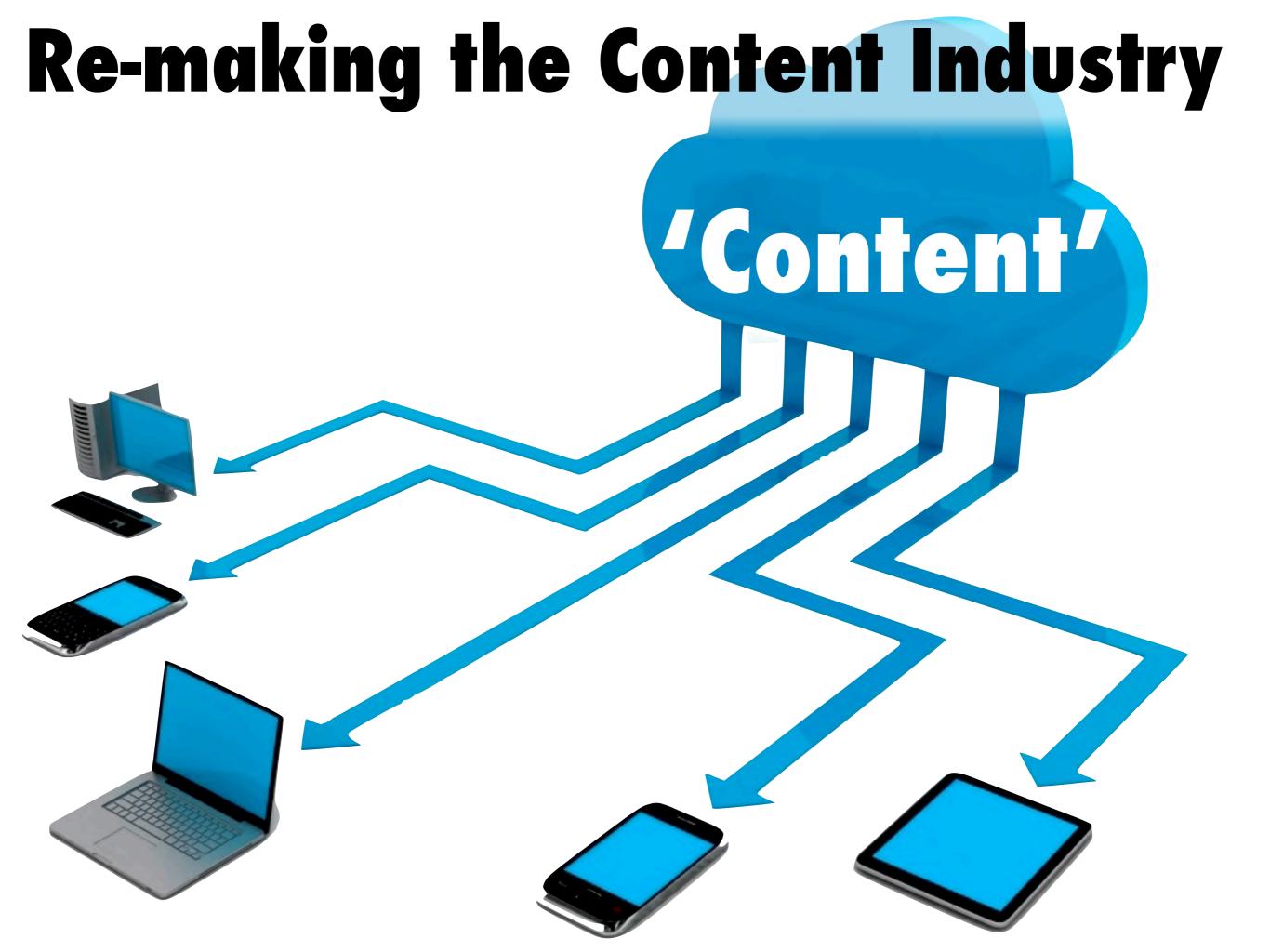
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Digital / Mobile Native Rights Logic needed





Based on a digital - mobile - social native Ecosystem



And very soon, print becomes just another screen...

NO JORNAL DO FUTURO, O FINAL DA MATÉRIA É SÓ O COMEÇO DA HISTORIA.

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Folha, o jornal do futuro. Integração total entre conteúdo impresso e digital: você começa a ler em um e continua no outro.

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Connecting the Crowd and the Cloud -

Filtering. Curation. Packaging. Sense-Making. Designing.





Users create vast amounts of Meta-Content

These shifts are good news for authors, creators, curators, producers, writers, journalists, 'makers'...

But:

Almost all creation becomes trans-media

Likelihood of increased 'Digital Darwinism'

• 'Gap Years' must be bridged until system is really liquid

• Distributors ie non-creators will resist fiercely

Legal frameworks must be adapted to fit the digital age

• Speed of change will be truly challenging!



SOPA | ACTA | PIPA | HADOPI

"Those that are willing to give up essential liberty to purchase a little temporary safety, deserve neither liberty nor safety..."





BENJAMIN FRANKLIN Deint d'après nature pour la Samille Exposé su Salon de 1990.

From protection to... engagement:)

The whole world listens to your music.

WHO IS PROTECTING YOUR RIGHTS?

There is strength in numbers. Together we will fight to guard your most important asset

- your songs. Join us in this battle. Visit our website or call our Washington, D.C. **USA headquarters** (202) 742-4375.

The National Music Publishers' Association. We are your voice.



Music Publishers Lancet intime

www.nmpa.org



"If you take more out than you put in the ecosystem eventually fails"

Tim O'Reilly



Social-Mobile-Cloud-OTT Television: a new **Ecosystem** in the making



Touch. Play. Connect. Share. Access not ownership *

readv







Access not ownership: New Generatives Required

Content: From To	
Centralized	Distributed
Scheduled / Their time	Real-Time / My-time
All invented inside	Invented anywhere
Owned and closed	Shared and open
Hyper-competition	Hyper-collaboration
Pyramids	Nodes
Spend and trash	Use and renew
One-way / One to many	2-way / Many to Many
Monolithic	Networked
Proprietary	Interoperable

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FUTURIST ©gleonhard

Less and less about 'Making a Copy' :)





Wicked Problems...?



KEVIN KELLY @ KK.ORG WHEN COPIES ARE FREE YOU NEED TO SELL THINGS THAT CAN'T BE COPIED

ww.mediafuturist.com

Music is only first: for most media, "selling copies" is over

According to StageofLife.com, in August, 49% of teens and college-age consumers reported spending zero dollars per month on music. Rather than buying iTunes singles or CDs of even their favorite artists, this age group copies music from friends, downloads free songs from music websites and streams music online.

Amount US Teen Internet Users Spend on Music per Month, Aug 2012

% of total

\$0	49.2%
\$1-\$15	38.7%
\$16-\$25 6.5%	
3.6% \$26-\$50	
1.0% \$50-\$75	
1.0% \$75+	
Note: n=413 ages 13-19 Source: StageofLife.com, Sep 28, 2012	
146230	www.eMarketer.com

We must redefine the meaning of Selling - in the future, what will it mean to 'sell content'?

Traditional Rights Licensing is quickly becoming a burning platform for the future remuneration of creation



Restricting, protecting, preventing, disabling ... is a suicidal strategy

Restricting access to content is a bad business model in the age of a global network that costs practically nothing to distribute on. – Fred Wilson, Union Square Ventures



Beginning in April, visitors to NYTimes.com have access to 10 free articles per month instead of 20.

Learn more about this change.

Your movie rental period for "Weißer Jäger, schwarzes Herz" has expired

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Not restriction but permission. Not control but engagement.



Toxic assumptions: controlling distribution is the key to \in



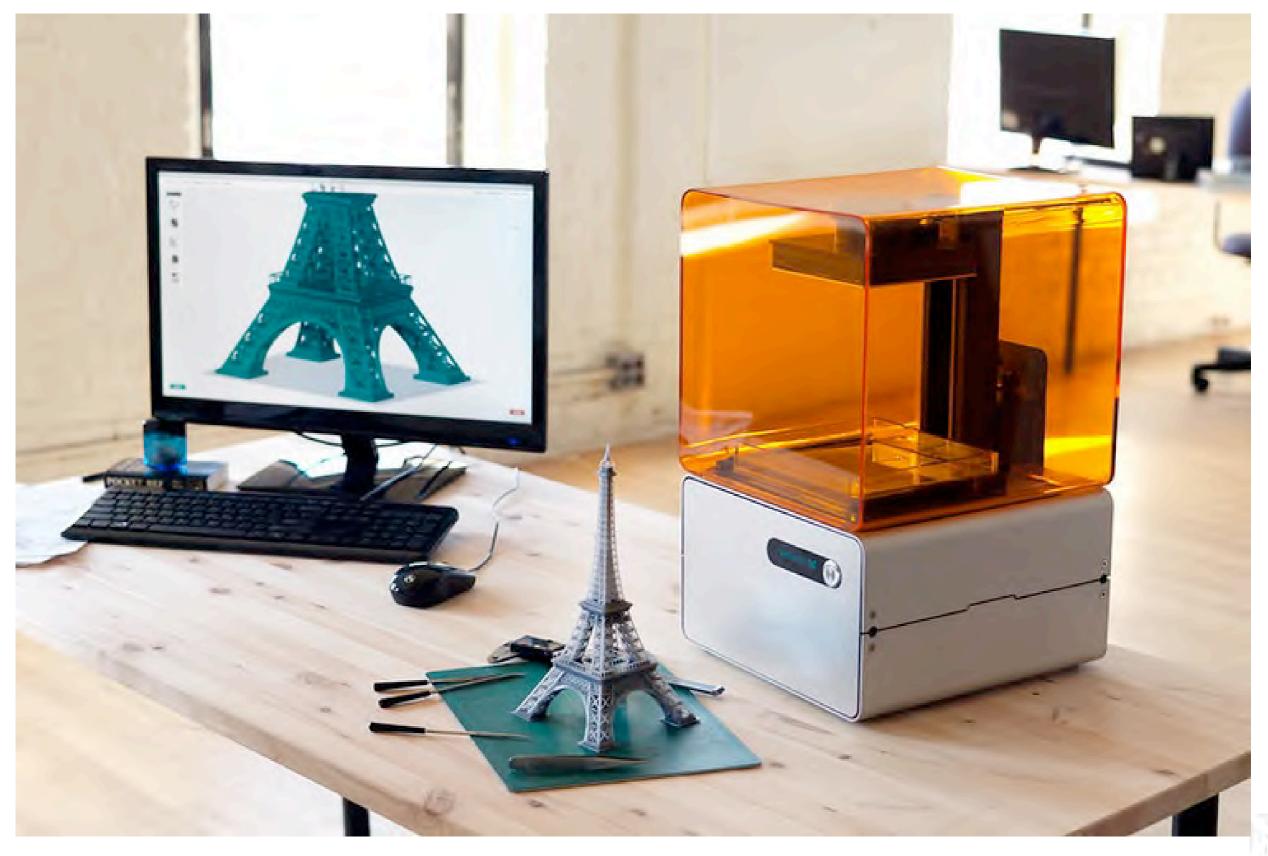
Traditional rights logic based on 'distribution' New social contracts emerging quickly **Real-Time & social beating plain search Control no longer results in higher prices** Increasing decline of attention monopolies Inevitable interdependence (ecosystems) **Incumbents: Irrelevance is the threat!**



Context. Packaging. Timeliness. Interface. Relevance. Embodiment...



First media and content, next... stuff!





The Newsscape Value creation in a post-channel media world New values cround content





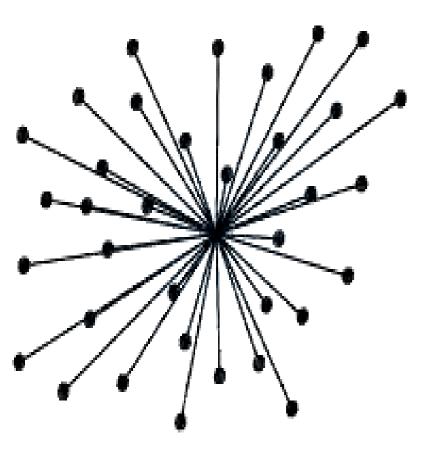
Media strategy
Thought leadership content
Scenario planning

www.futureexploration.net

Created by Ross Dawson

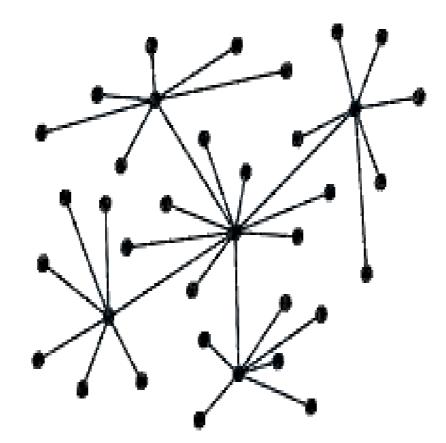
Published under a Creative Commons Attribution-ShareAlike 2.5 licence

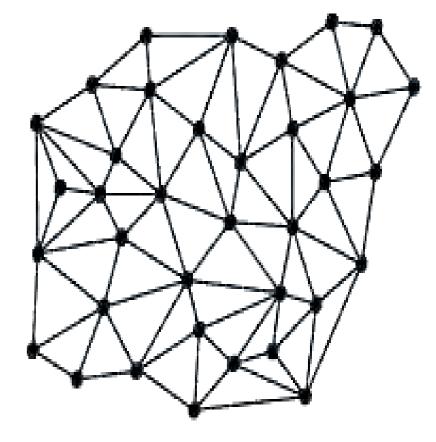
Distributed Media | Content Rights | Commerce | Users Production | Revenues...











distributed facebook





Traditional TV... just an App?

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Social Networks are becoming the new Broadcasters



Cloud-based Content Services: Rights Dilemmas

Introducing kindle cloud reader



Read books instantly in your browser with our free Kindle reading app









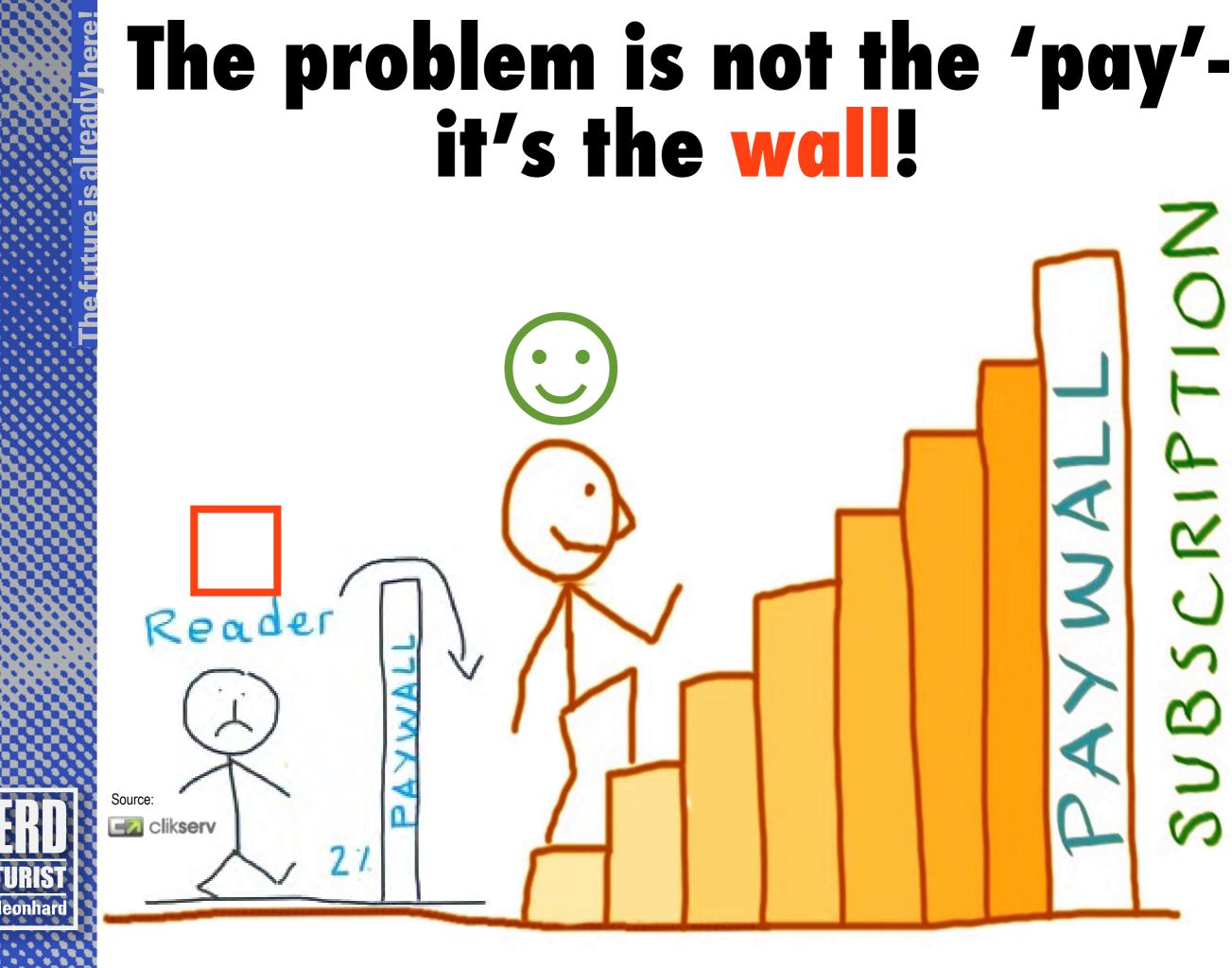






The future of paid content: Pay-Will not Pay-Wall :)

- AN



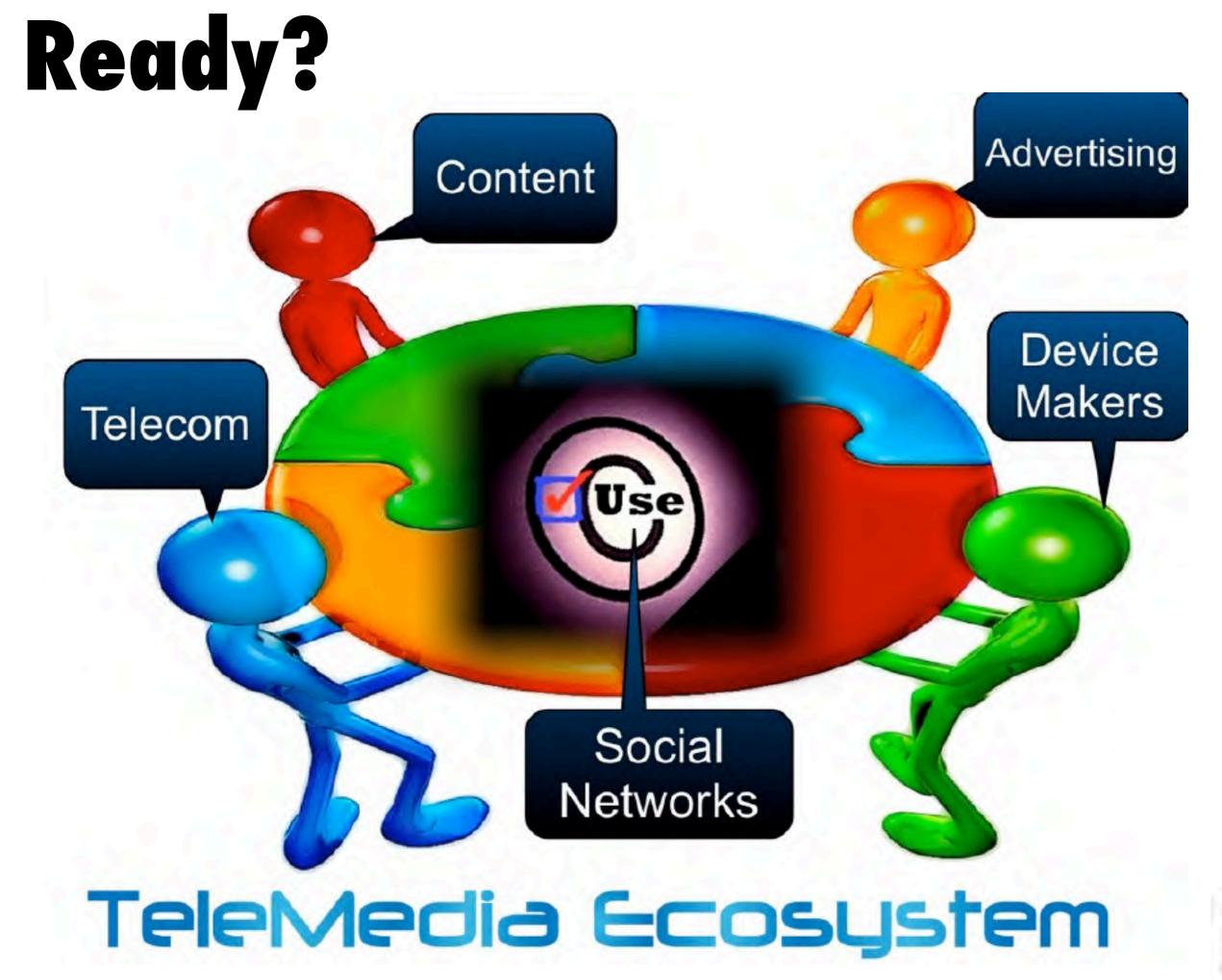


WHAT WE'RE PREPARED TO PAY FOR THINGS IS EXTRAORDINARILY SUBJECTIVE AND INCREDIBLY CONTEXTUALLY DETERMINED.

RORY SUTHERLAND, CHAIR, THE IPA, UK]

TeleMedia convergence: ETA: 3 Years

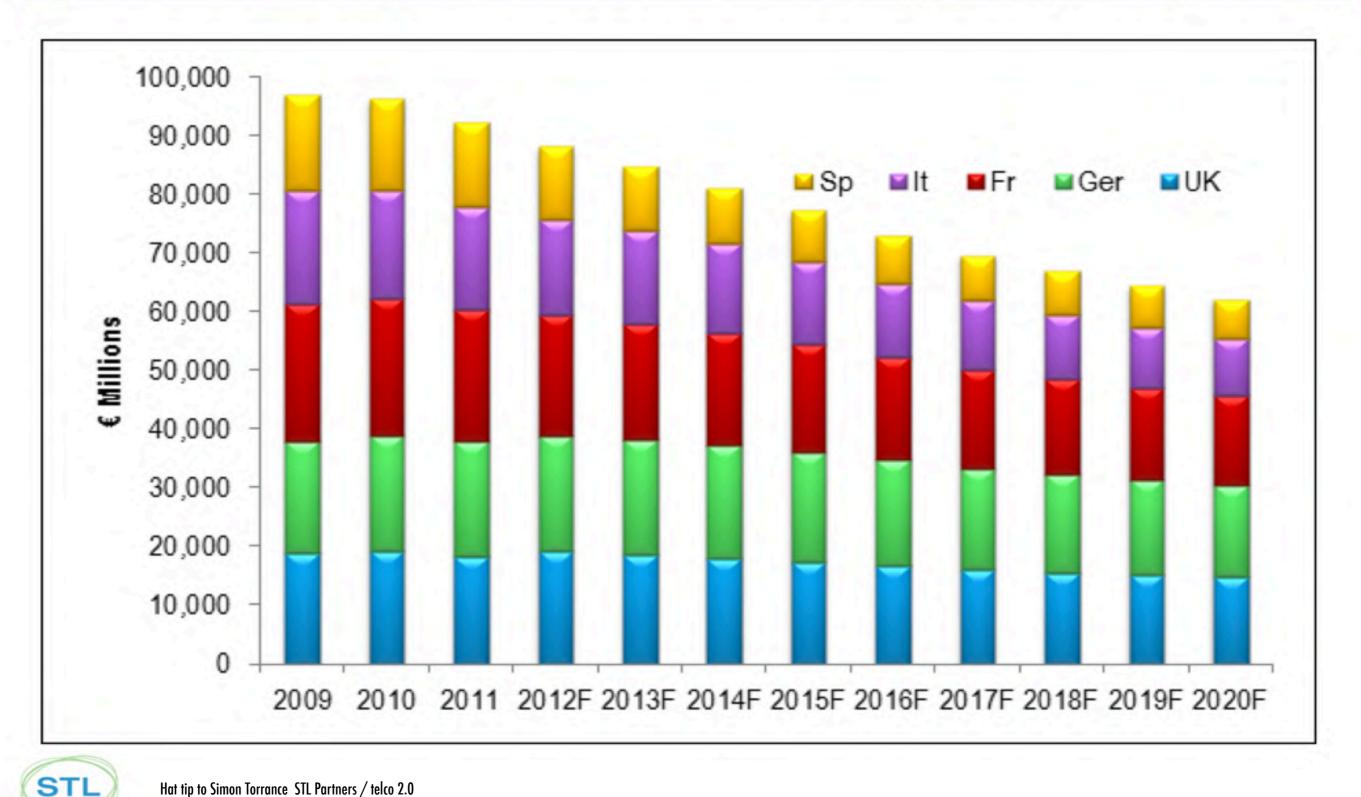






Most operators will move into 'content'

EU5: Brutal decline in core revenues (Voice, SMS, Data)



Content

© Phillip Minnis | Dreamstime.com

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Telia Denmark offers access to Spotify's digital music

Westman SMA, 2012 12 (FEST Man

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Total Cermins has agoled an acculate agreement with music service Spottly in give Damini customers access to a largerinated ibrary we model, tablec or PEL Take has included Scottly Promium from 22 May absorbed in the index packages for other service reacted a number, depending on which package (castomers chacks). The permanent offer is weld for its weaks. Thereafter, o will be passible to get Scottly Promium benefits included in mobile packages to at an accompany good price.



a the last of main data rename

Read more apout Spotily Premium term



Nachdem die engeküheren Zusenmenscher zwischen der Deutechen Telekom und Spotify bereits vor einigen Wochen große Wellen geschlagen hat, ist es num endlich soweit; Der neue Telekom-Tarif inklusive Musiktiatrate kann gebucht werden. Damit steht dem unbegrenzten Musikgenuss vis Smartphone oder Tablet keine Grenzen mehr im Weg, oder doch?

Ein paar Einstlegshürden sind leider noch vorhanden: Die Spotify-Flatnate ist zunächst nämlich nur für Neukunden in dem "Special Complete Mobil Musio"-Tarif verfügber. Hier bekommt ihr für 29,95 Euro im Monat neben der Musikftatrate 50 Freiminuten in alle Netze, eine SMS-Flabrate und 200 MB an Detervolumen mit bis zu 7.2 MBit. Durchaus intererssent, wenn man bedenict,



TDC Play and YouSee Play is used as key 'USP' across Broadband, Mobile broadband and Mobile!



Creative essection exercise (inks) in class Name Cartement (name)



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Reasonable Permission solves the Piracy Problem

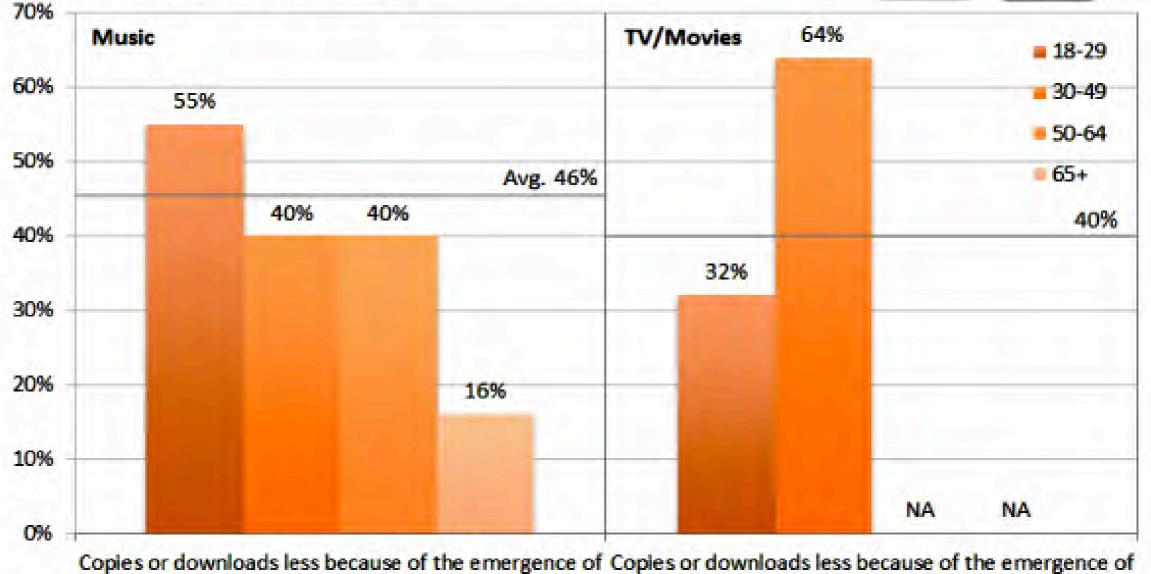


Growth of Legal Streaming = Less Piracy (Among Those Who Do Both)

alreadv here!

The future is

[▶]@gleonhard



legal music streaming services

legal video streaming alternatives

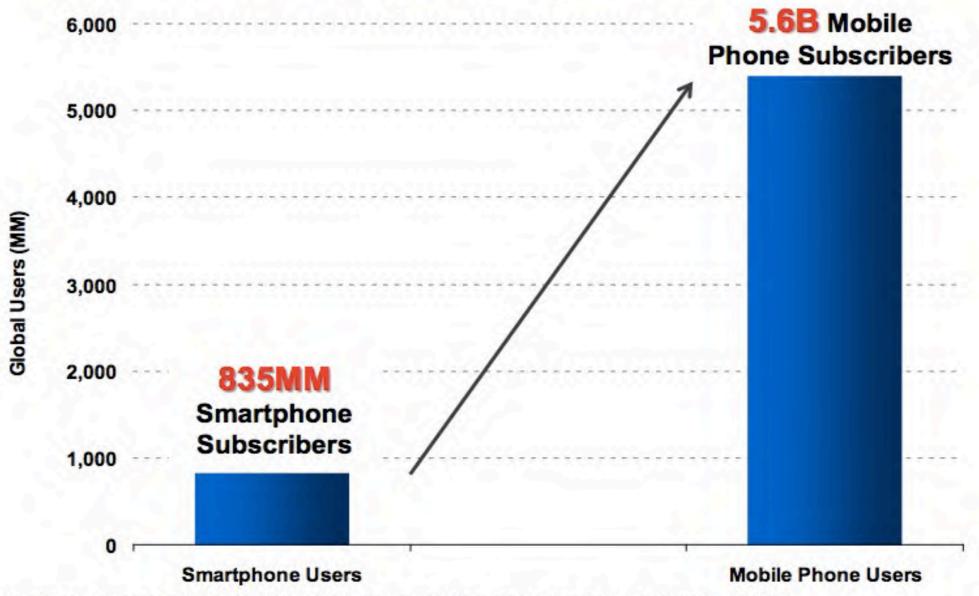
A huge opportunity for bundling content - and offer premiums on top!

Despite Tremendous Ramp So Far, Smartphone Usage Still Has Huge Upside

real

@dleonhar

Global Smartphone vs. Mobile Phone Subscribers, 2011E



Source: Smartphone subscriber estimates per Morgan Stanley Research; Mobile phone subscribers per Informa (as of Q2:11). Note: While there are 936MM global 3G subscribers as of Q2:11, not all of them were smartphone users. One user may have multiple mobile subscriptions, therefore actual user #s may be lower than subscriber #s.

People are paying for content - but need strong Reason to Pay (RTP) *Techdirt

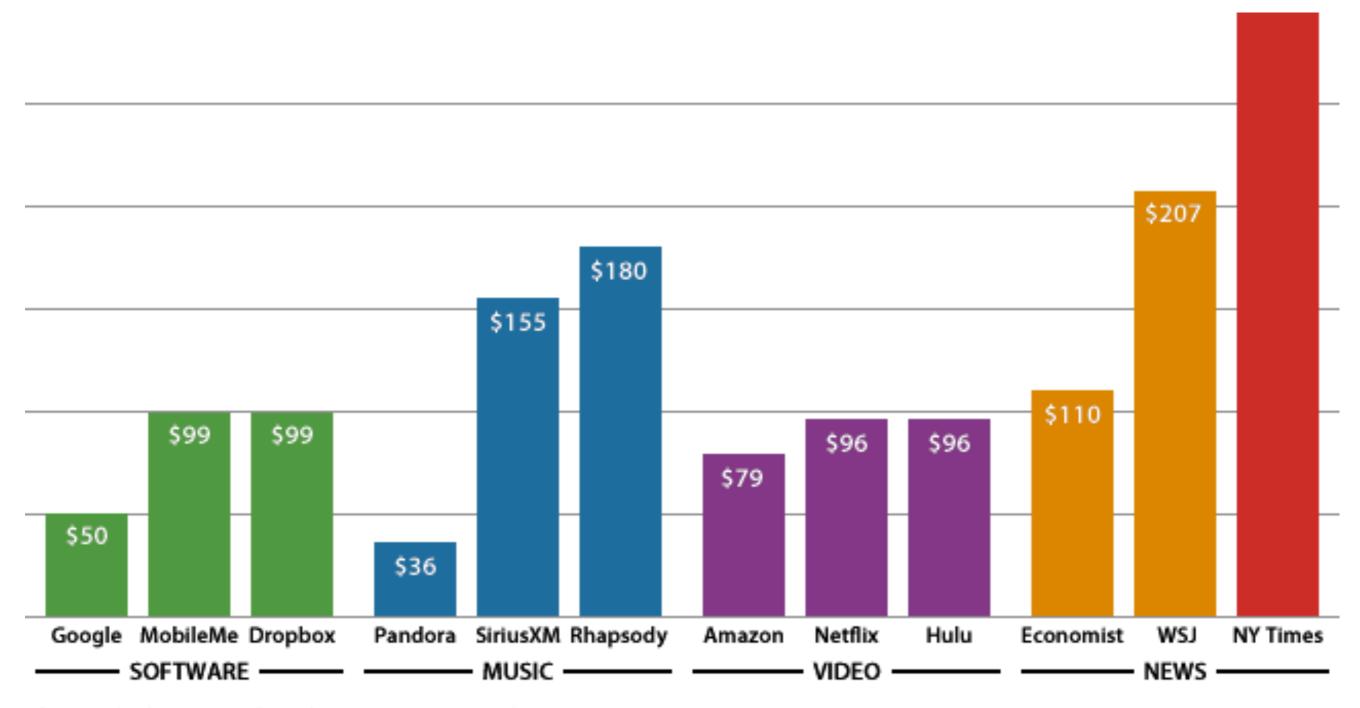


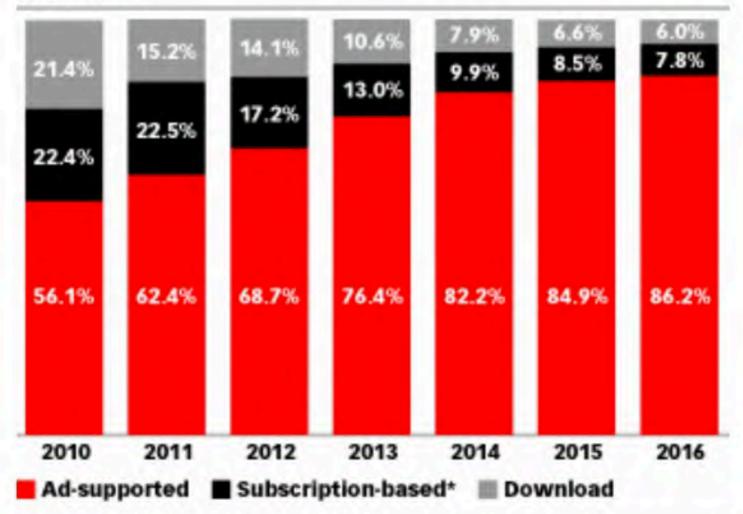
Chart: Michael DeGusta / TheUnderstatement.com, March 2011





Advertising 2.0 will fund digital content - ETA...?

US Mobile Music Revenue Share, by Type, 2010-2016 % of total



Note: includes revenues generated from direct download or live stream on mobile devices only; exclude sideloaded music, ringtones and ringback tones; *includes subscription services that are exclusive to mobile devices; excludes services that are accessed via multiple platforms Source: eMarketer, Oct 2012

145507

@gleonhard

www.eMarketer.com

Is there \$ in advertising-supported content?

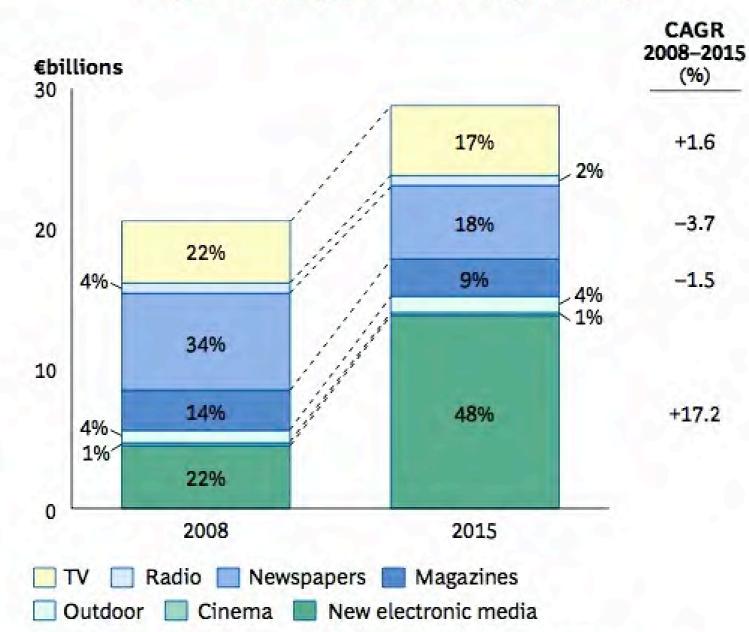
Exhibit 2. Advertisers Will Increasingly Shift Their Spending to New Electronic Media

alreadv here

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♥@gleonharo

Projected changes in advertising spending





Sources: Frankfurter Allgemeine Zeitung; BCG market scenario; BCG analysis. Note: Advertising in new electronic media includes online and mobile advertising. All figures are "net-net" budgets that exclude discounts and agency fees. N = 121. Because of rounding, totals may not add up to 100.

Premium-Services Up-Selling Added Values **New Generatives**



The New Generatives *thanks to Kevin Kelly **Packaging and Interfaces Curation, Filtering and Selection Social Context & Relevance** Intelligent Aggregation **Assisted Serendipity** meliness and Personal Relevance **Quality and Trust Guarantee Customization and Personalization** Localization / Contextualization **Cloud-to-Device Management Advertising as Content (Branded Content)** Gamification ... and many more

New Music Generatives via JWT (via slideshare)

24 FANS IN THE FRONT SEAT

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Freemium Futures

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Fluid + Feels-Like-Free + Freemium | Upselling



Creators & Artists must embrace change and focus on solutions based on Collective Objectives

www.ConnectingDotz.com



Media Futures: de-centralized, OTT, P2P, Niche!



hulu









amazon



buddy TV

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Content Producers are increasingly 'going direct'

TOUR

DATES

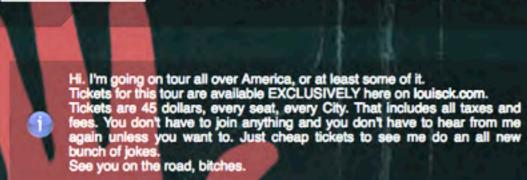
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LOUIS CK + UPDATES

SEE LOUIS ON TOUR!



BUY LIVE TOUR TICKETS

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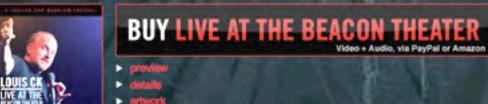
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BUY SHAMELESS Audio only, via PayPal or Amazon

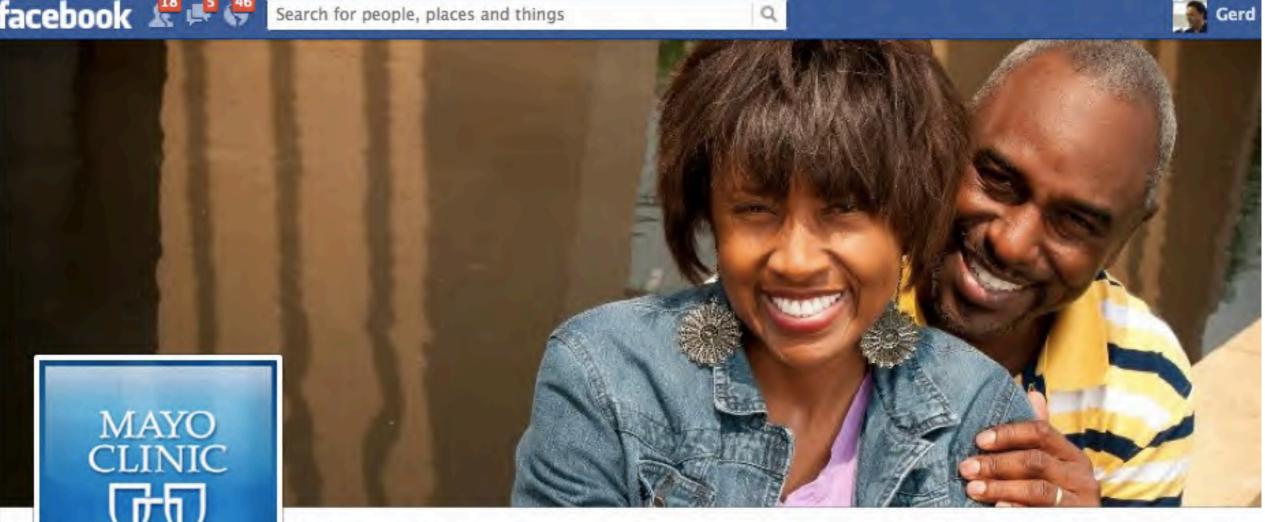


BUY WORD - LIVE AT CARNEGIE HALL



...and Brands, as well :)

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Highlights -

'Storytelling' is changing dramatically

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Blurring the line between the wired world and the wild world, the National Film Board of Canada's Bear 71 is a multi-user interactive social narrative that observes and records the intersection of humans, nature and technology.

Launched with a live, interactive art installation at the 2012 Sundance Film Festival New Frontier Program, the storyworld of *Bear 71* is a fully immersive, multi-platform experience. Participants explore and engage with the world of a female grizzly bear via animal role play, augmented reality, webcams, geolocation tracking, motion sensors, a microsite, social media channels and a real bear trap in Park City. This project is the most recent example of how the NFB is changing the face of cinema.

"Lead the Revolution or be the Victim of Evolution"

1 - DECEMBER OF



Tesco CEO Philip Clark

Summary

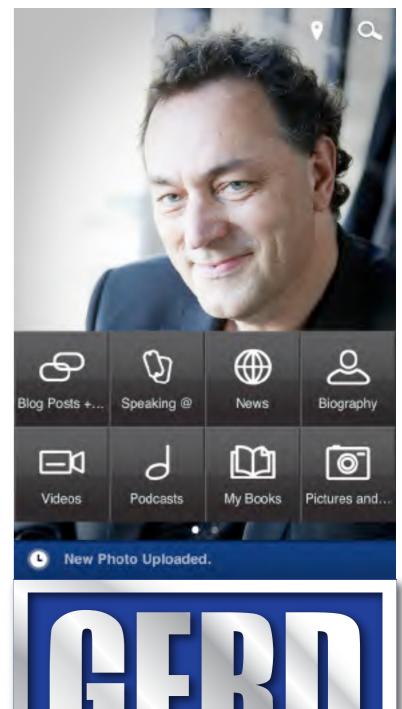
- The future is SoLoMo: Social / Local / Mobile
- The creators and the users are center-stage, again
- Freemium models become essential *but
- Inventing the 'New Generatives' is crucial
- Public Content Licenses are inevitable (music 1st)
- The TeleMedia convergence is imminent
- Access not ownership' requires new legal framework
- Think: tablets, mobile web, social. Repeat.
- Video goes OTT, inevitably
- Everything is about creating new ECOSYSTEMS
- Embrace interdependence + hyper-collaborate





Thanks for your time!

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