



# ***GLOBAL TRENDS IN DIGITAL MEDIA***

**PricewaterhouseCoopers**

**New York, NY**

**January 27, 2010**

***Presented by:  
Richard A. Bendis  
President and CEO  
Innovation America***

# Today's Panel

Rich Bendis - Innovation America



Tracey Jennings - Pricewaterhouse Coopers



Ricardo Curtis - House of Cool Studios and Red Rover



Jen Chorlton - Magmic Mobile Entertainment



Jason Altman - Longtail Studios



Mr. Martin Dufresne - Alliance Numerique



# The Global Innovation Imperative

- Innovation is Key to Growing and Maintaining a Country's Competitive Position in the Global Economy and to address Global Challenges
- Collaboration among Small and Large Businesses, Universities, and Research Institutes is Essential for Innovation—
- New Institutions and New Incentives, are increasingly important to support collaboration and foster innovation
- Competitive advantages are increasingly tied to human capital and innovation
- Economic growth is closely related to education/workforce, energy, climate change, environmental, natural resource and geopolitical issues



**INNOVATION  
MATTERS**

# Canada and US Cross Border Facts

- 300,000 travelers cross the Canada US Border Everyday
- 35,000 trucks cross the border everyday
- \$1.6 Billion of trade everyday



## The Big Table

Film and Video Incentives in Canada (2010)

Digital Media and Animation Incentives in Canada (2010)

# Why Is Innovation Essential?

***“INNOVATION  
DISTINGUISHES  
BETWEEN A LEADER  
AND A FOLLOWER.”***

**-STEVE JOBS**



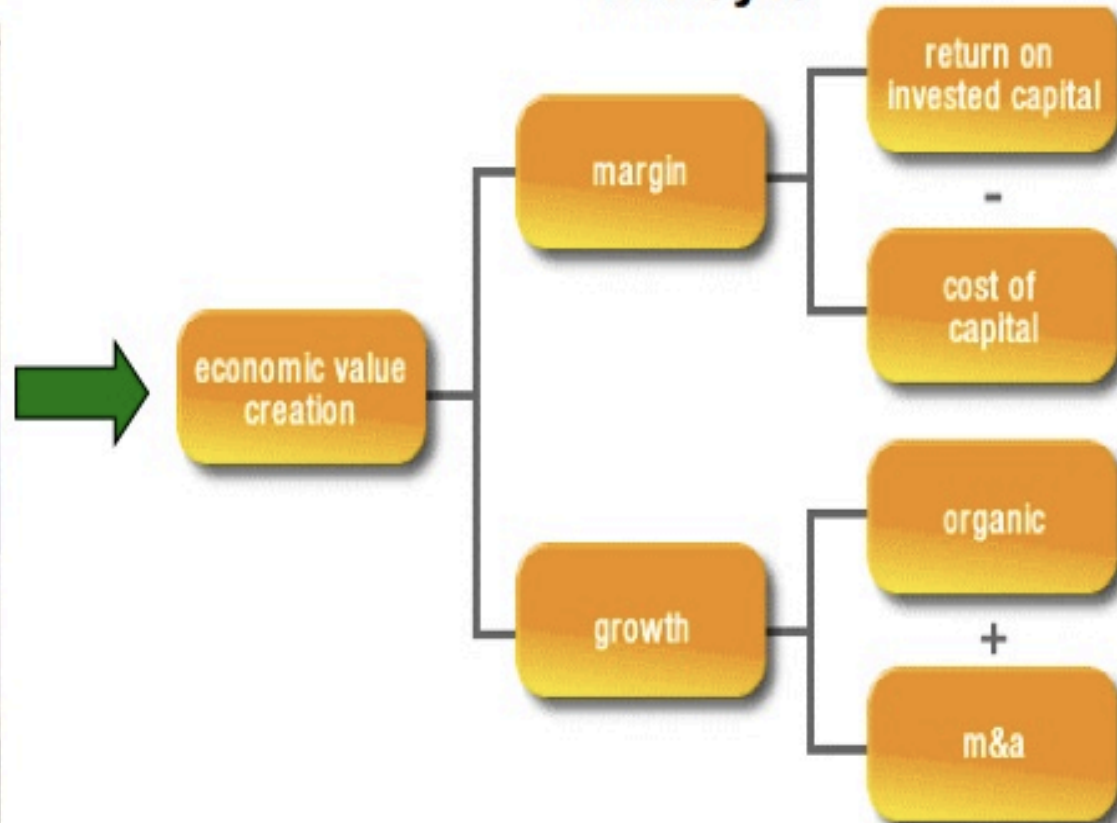


# Innovation Paradigm Shift

## PROOF OF CONCEPT (Technological Feasibility) “It Works!”



## PROOF OF RELEVANCE (Market Pull) “I’ll Buy It”



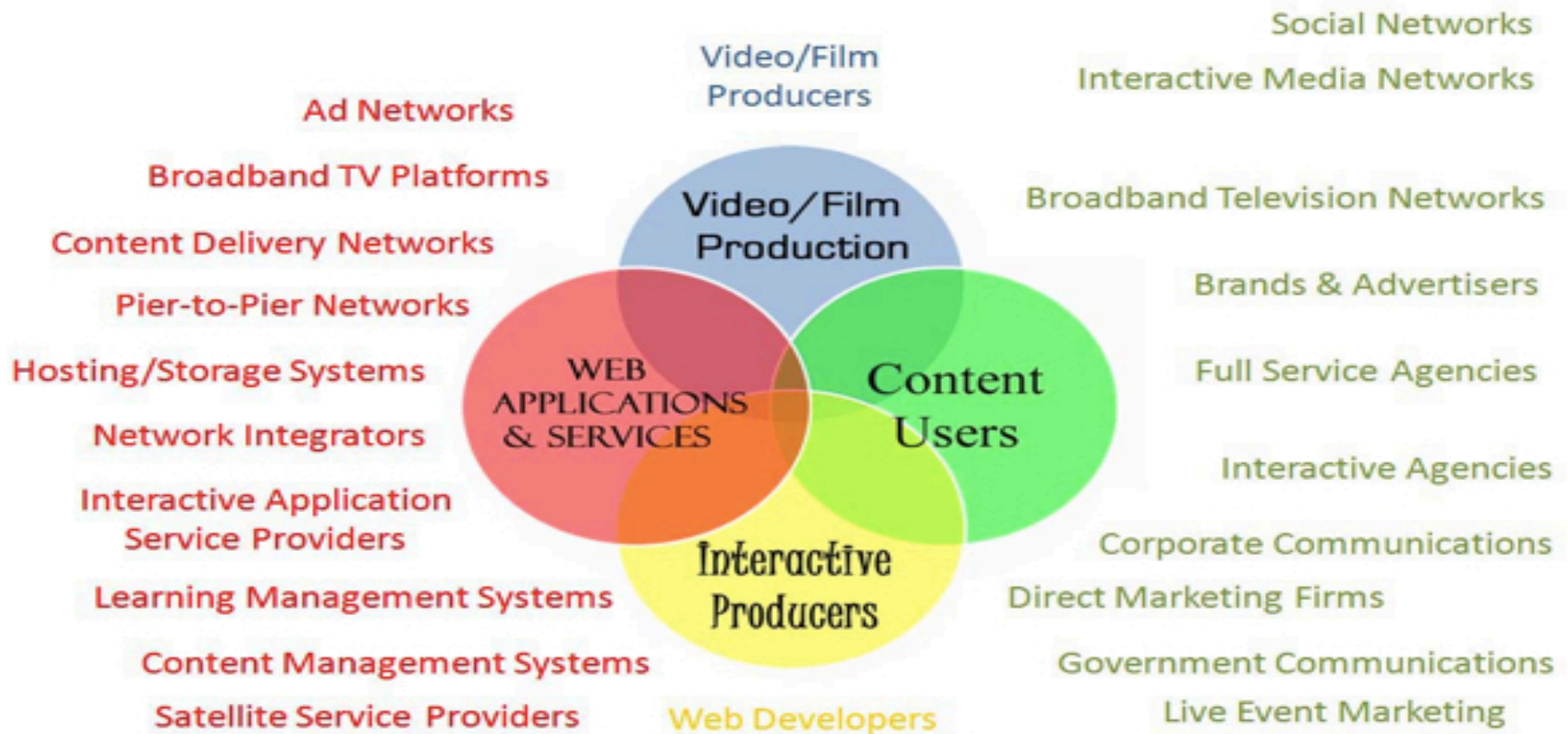
# Digital Media Definition

**Digital Media** usually refers to any electronic media that is created and displayed using computer technology, such as digital audio, digital video and anything that you would find online, such as computer games, internet technology, communication (email) & social interaction (Facebook for example).



# Digital Media Ecosystem

## DIGITAL MEDIA ECOSYSTEM

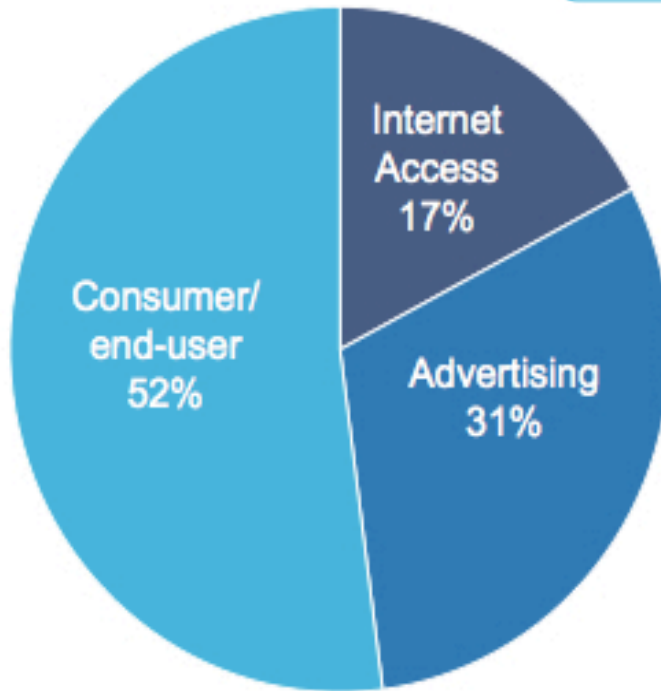




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# Component Share of Global E&M Spend

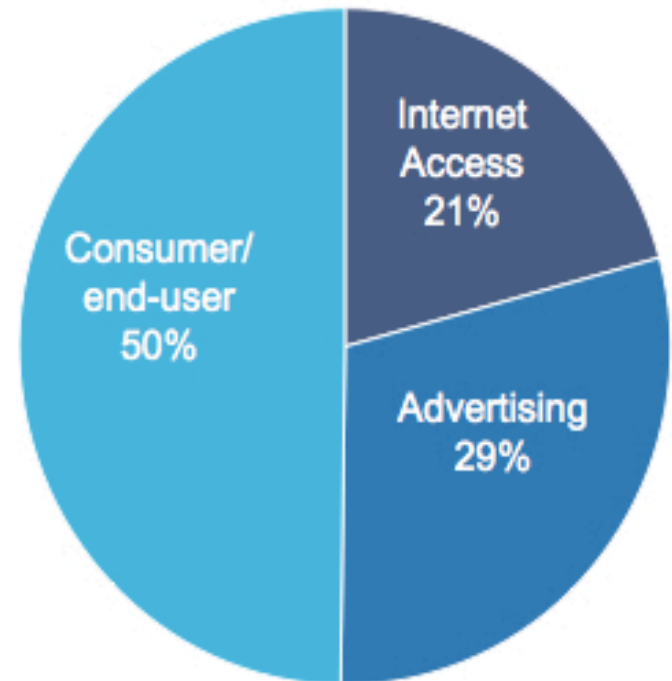
2009



Global:

5.0% CAGR, \$1.7 trillion

2014



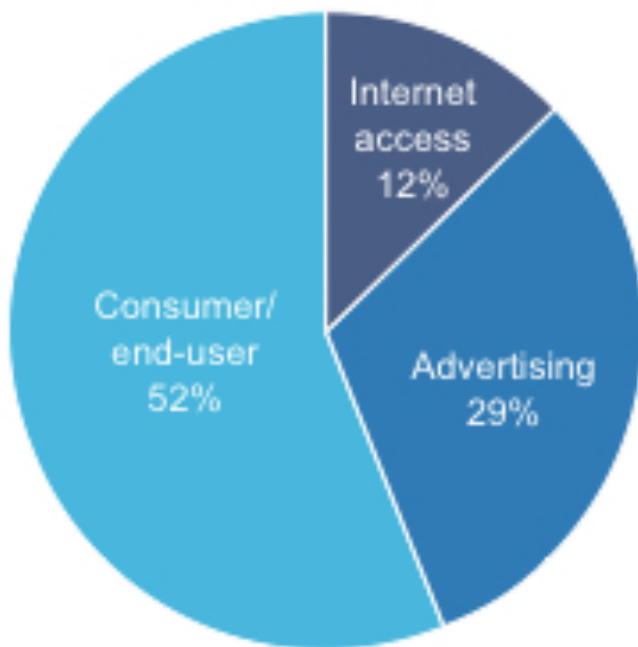
Total spending 2009: US\$1.32 trillion

Total spending 2014: US\$1.69 trillion

PricewaterhouseCoopers LLP

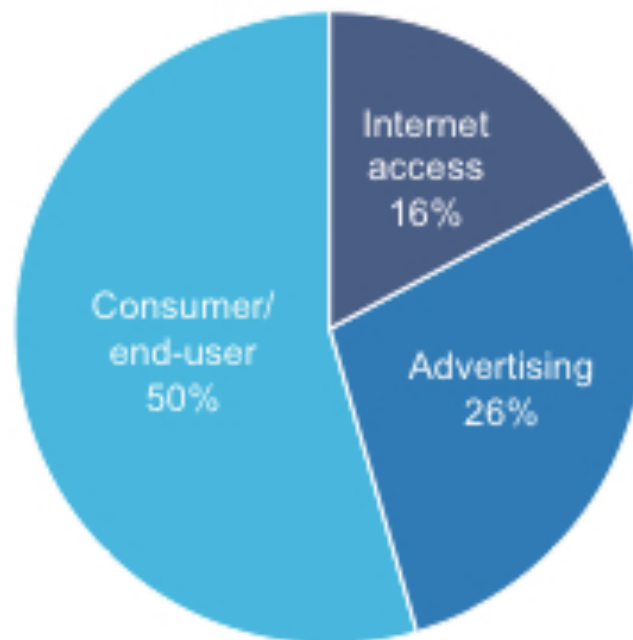
# Component Share of Canadian E&M Spend

2009



Total spending 2009: US\$36.77 billion

2014



Total spending 2014: US\$47.52 billion

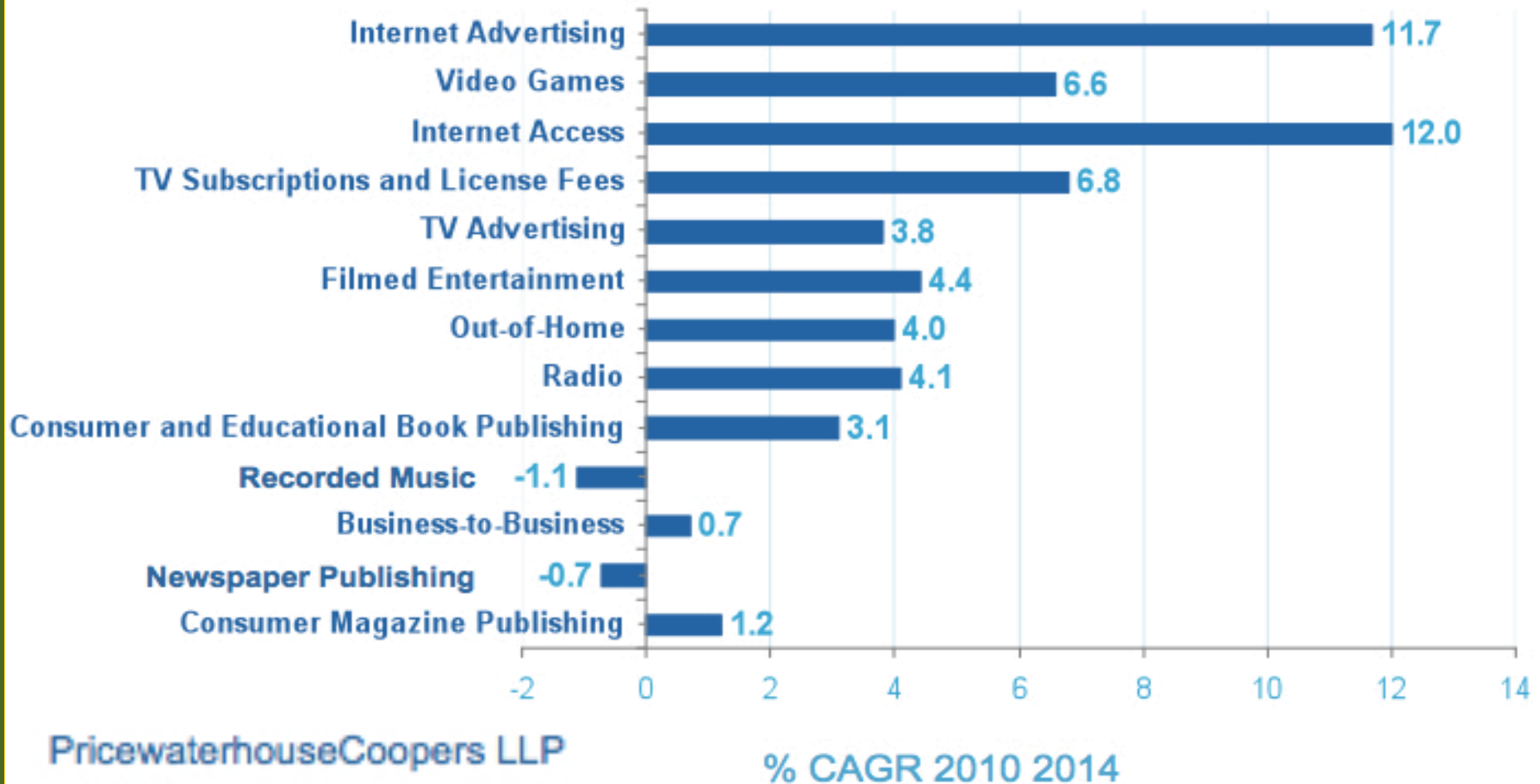
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# Global Growth By Segment





# Canadian Growth By Segment



# 7 Digital Media Trends of 2011

- **Print Goes to the Tablet**
- **The Digital Talent Pool**
- **Deal Hunters**
- **Mobile Momentum**
- **Social Nets Deliver Qualified Traffic**
- **Power to the People**
- **Target Power**

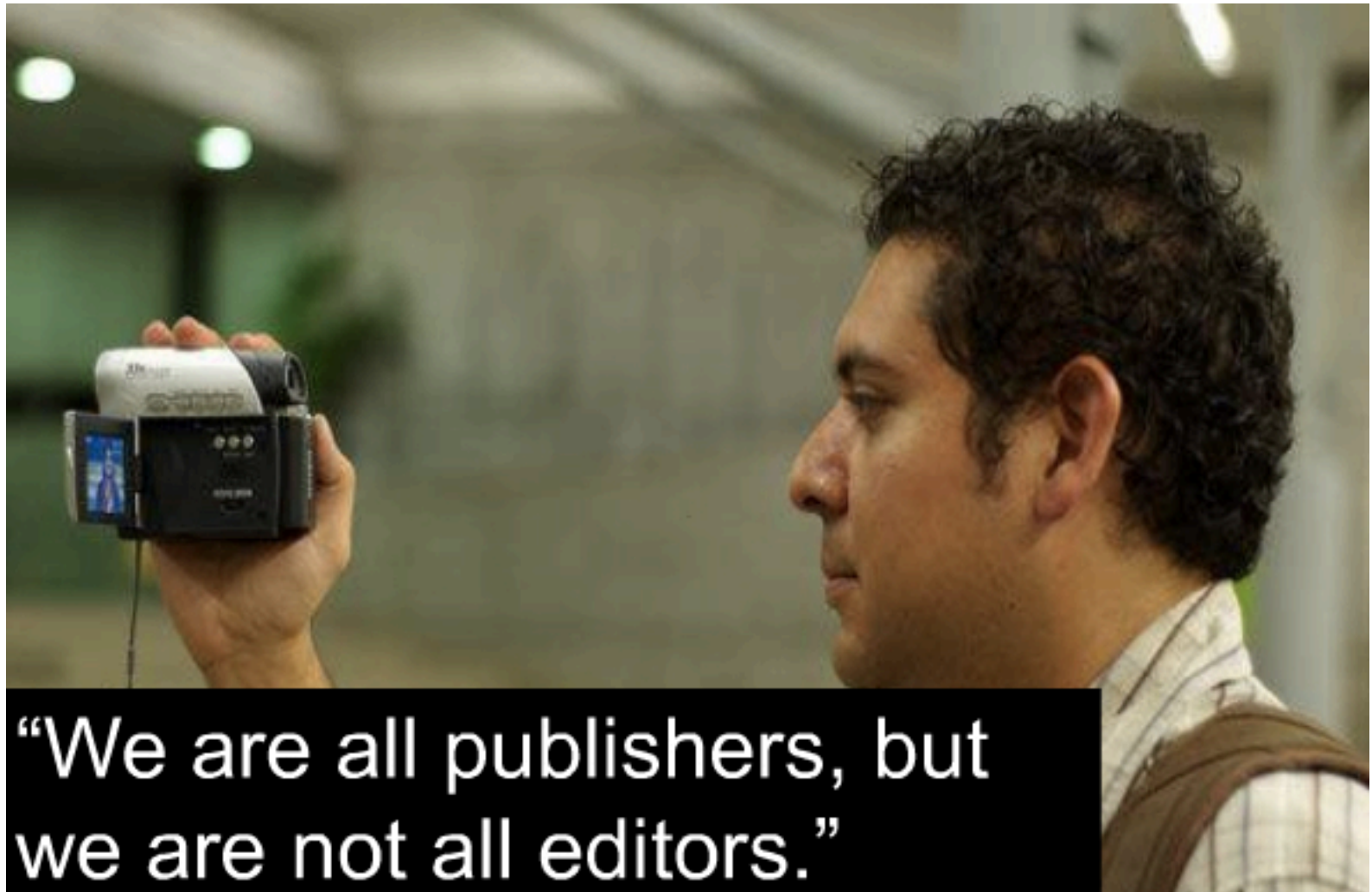




# We Are All Newspapers







“We are all publishers, but we are not all editors.”

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## Canadian Consulate, New York, Hosts Digital Media Seminar to Promote Canada's Growing Industry (Bendis to Speak) (Updated)

Monday, 17 January 2011 00:00 | Written by Administrator |  



*-Digital North Seminar Showcases Canadian Talent, Opportunities, and Partnerships to New York Metro Area Digital Media Executives-*

**New York, January 10, 2011** – The Consulate General of New York, announced today it will host "Digital North – Creative Opportunities in Canada", a seminar and networking reception designed to strengthen ties between the digital media industry in the New York metro area and Canada on Thursday January 27<sup>th</sup>, 2011 at 6:00pm.

The one-hour seminar will highlight the differences and parallels between Canada and the United States' digital media environment. The event will include an overview of Canadian tax incentives and government programs available to companies with international expansion plans. The reception following the seminar will provide industry executives with a platform to network and build their cross-border contacts.

### Top Innovation Bloggers



Rich Bendis voted as the 4th best Innovation Blogger in the World in 2010 by BloggingInnovation Voters

Thanks to all those who voted for Rich!

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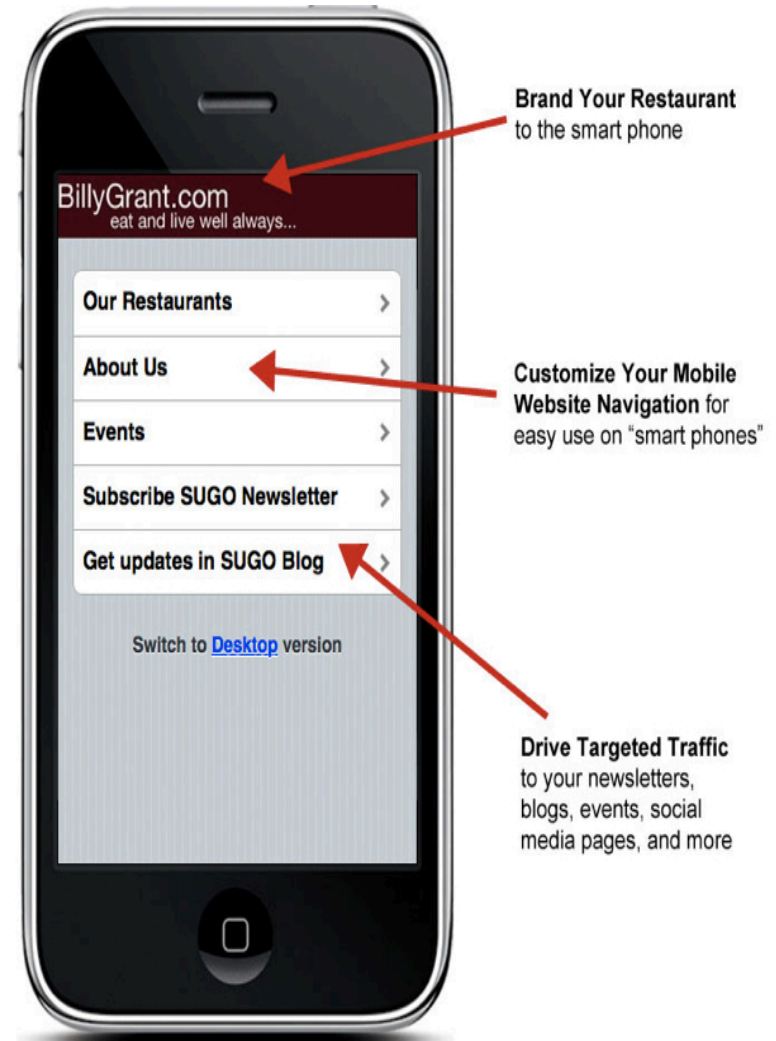
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# Looking Forward

- Device makers will continue to drive the mobile industry
- Brands will use apps to drive hundreds of million dollars in sales.
- Location will become THE CORE technology to mobile devices
- Location-based advertising will explode
- VC's will begin to make major strategic investments



# Government's Role in Innovation

- Long term vision and planning
- Identify gaps and trends in science, technology, innovation and SME development
- **Be a catalyst through long-term strategic investments and partnering**
- Develop a balanced and flexible research and development investment portfolio
- Encourage private sector innovation
- Establish performance-based research and development
- Accelerate the commercial exploitation of creativity and knowledge, through innovation and research, to create wealth, grow the economy, build successful businesses and improve quality of life





# What is An Innovation Intermediary?

An Organization at the Center of the region's, state's or country's efforts to align local technologies, assets and resources to work together on advancing Innovation.



## Canada 3.0 “Moonshot”



Anyone  
can do  
anything  
online in  
Canada  
by 2017

# The Digital Economy

more than the digital economy:

- it is now about a digital society
  - This is transformative technology.
  - It is not some passing fad.
  - And, we are still in early days.
- The issues can no longer be left to technological experts and specialists:
  - digital now underlies how we create, communicate and store information in all media





# Bill Gates - Microsoft

**“Never before in history has innovation offered promise of so much to so many in so short a time.”**







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