



LE GROUPE

INVESTOR PRESENTATION
POST H1 2017 RESULTS

This presentation contains certain forward-looking statements based on current expectations, forecasts and assumptions that involve risks and uncertainties.

These statements are based on information available to the Company as of the date hereof. All forward-looking statements are TF1 management's present expectations of future events, beliefs, intentions or strategies and are subject to a number of factors and uncertainties that could cause actual results to differ materially from those described in the forward-looking statements.

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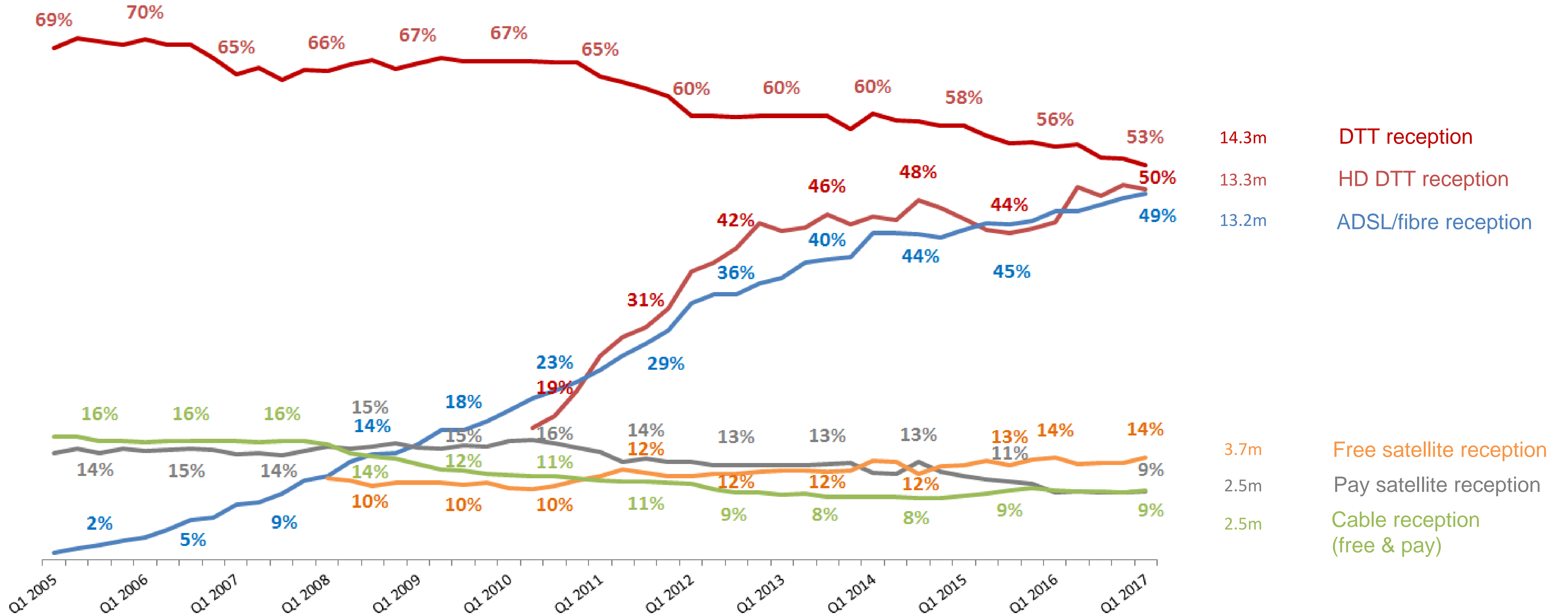
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FRENCH TV MARKET

TV RECEPTION MODES IN FRANCE

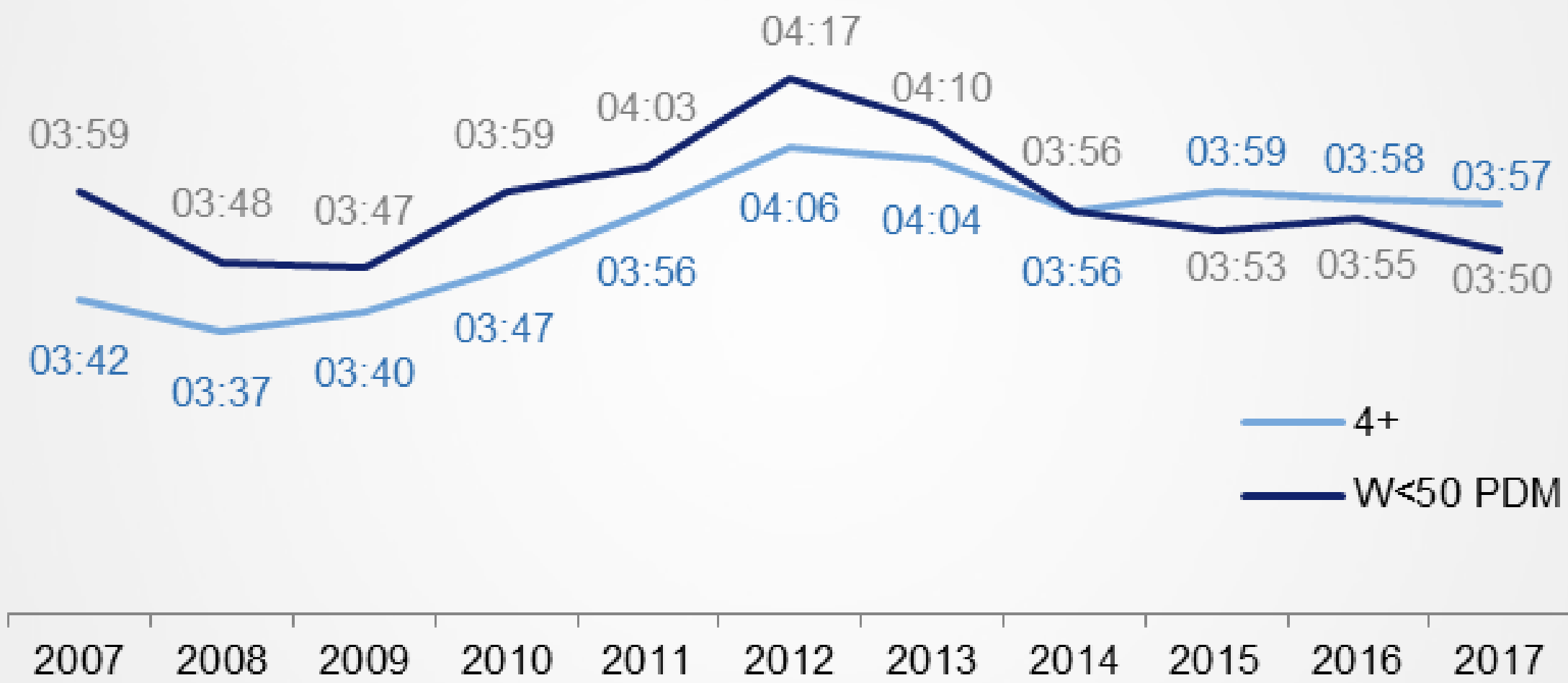
EVOLUTION OF RECEPTION MODES AS A % OF HOUSEHOLDS

(Main reception mode as a % of households equipped with TV)


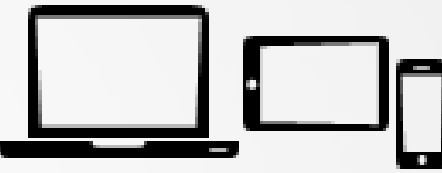


TV CONSUMPTION REMAINS AT A HIGH LEVEL

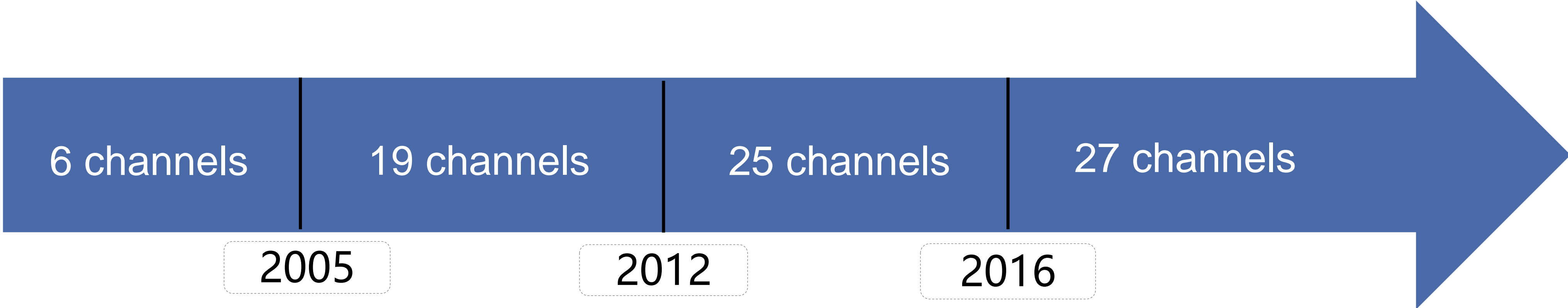
FRENCH PEOPLE WATCH NEARLY 4 HOURS OF TELEVISION A DAY



25-34 YEARS-OLD: + 7% AUDIENCE THROUGH 3 COMPLEMENTARY SCREENS

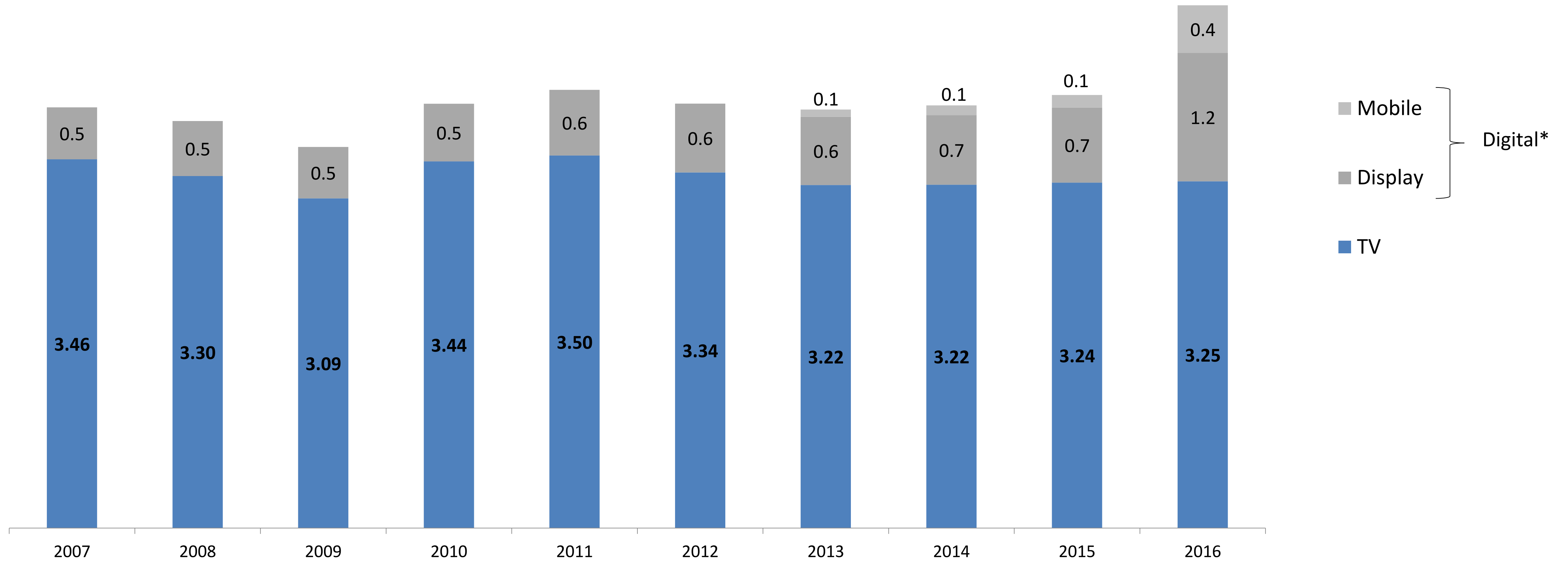
		
Daily cumulative audience	76.6 % i.e. 5.3 million viewers	10.4% i.e. 0.8 million viewers
Daily watching Time	3:08	0:12
	+ = 3:20	

FRAGMENTATION IN THE FRENCH AUDIOVISUAL SECTOR SINCE 2005

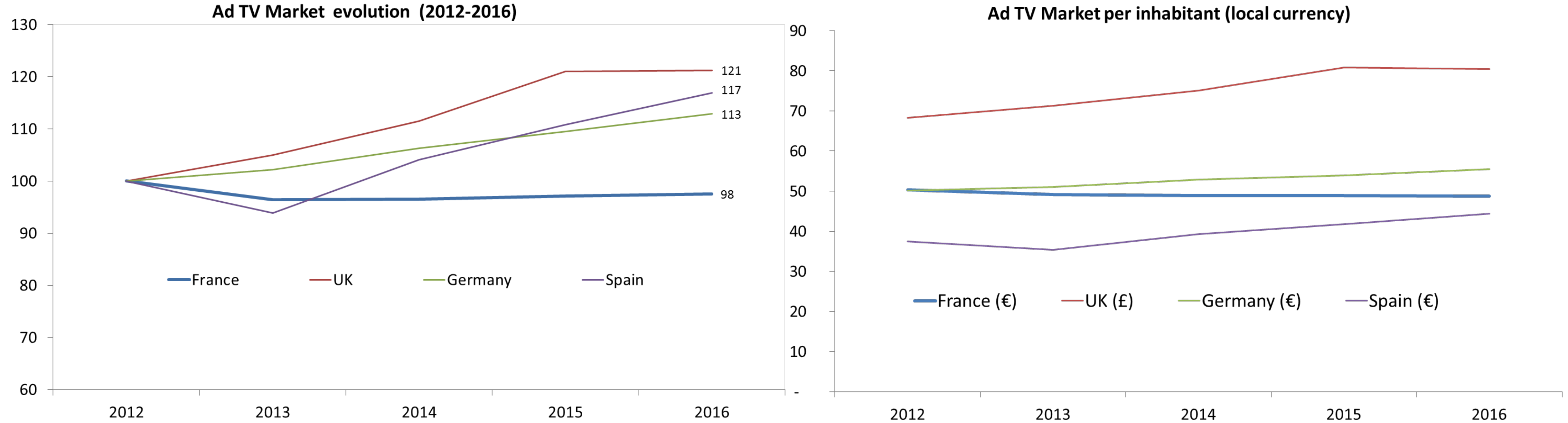


A €3.2 BN CONSTANT TV ADVERTISING MARKET

EVOLUTION OF TV AND DIGITAL* ADVERTISING MARKET (€BILLION)



FRENCH AD TV MARKET EVOLUTION DURING THE LAST 5 YEARS



Source: France – IREP, UK – Advertising Association, Germany – ZAW, Spain – Infoadex

This slide may not be used in an other context than this presentation

REGULATION: CURRENT SITUATION

Obligations to invest

- ✓ 3.2% in the co-production of European cinema works*
- ✓ 12.5% for the commissioning of national heritage audiovisual works*

* of the previous year's net annual advertising turnover, within a calendar year

Advertising

- ✓ Up to 12' per hour
- ✓ Up to 9' per hour on average each day
- ✓ Movies: up to 2 slots and 6' of advertising
- ✓ State-owned channels: no advertising from 8pm to 6am

Obligations to broadcast

- ✓ Cinema and audiovisual works: 60% European-origin and 40% French origin at least
- ✓ A maximum of 192 movies per year
- ✓ A minimum of 2/3 of the annual broadcasting airtime devoted to French-speaking programmes
- ✓ 750 hours of children's programmes, 800 hours of news bulletins and magazines

Media Independence

- ✓ **49% max ownership** (of the capital of a company operating a domestic DTT service with an audience share >8%)
- ✓ **7 DTT licences**
- ✓ **2 out of 3 media** (among TV, radio and daily press, with national coverage)

WHAT WE ARE LOBBYING FOR

Advertising

Prohibited sectors:

- ✓ Promotions in the retail sector
- ✓ Cinema (movie trailers...)
- ✓ Tobacco / Alcohol

Fiscal Issues

- ✓ **Audiovisual taxes** (CNC, France TV, radio, press): ~~€~~88m in 2016
- ✓ **Audiovisual sector financing** (obligations to invest)

Production & Content

- ✓ Mandates for distribution of content
- ✓ >36% of dependent production
- ✓ 15% of ownership threshold (above which a producer is considered as dependent)



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TF1 GROUP PRESENTATION

A GROUP ORGANISED IN TWO BUSINESS SECTORS



BROADCAST

FREE PLATFORMS



OTHER PLATFORMS & RELATED ACTIVITIES



STUDIOS & ENTERTAINMENT

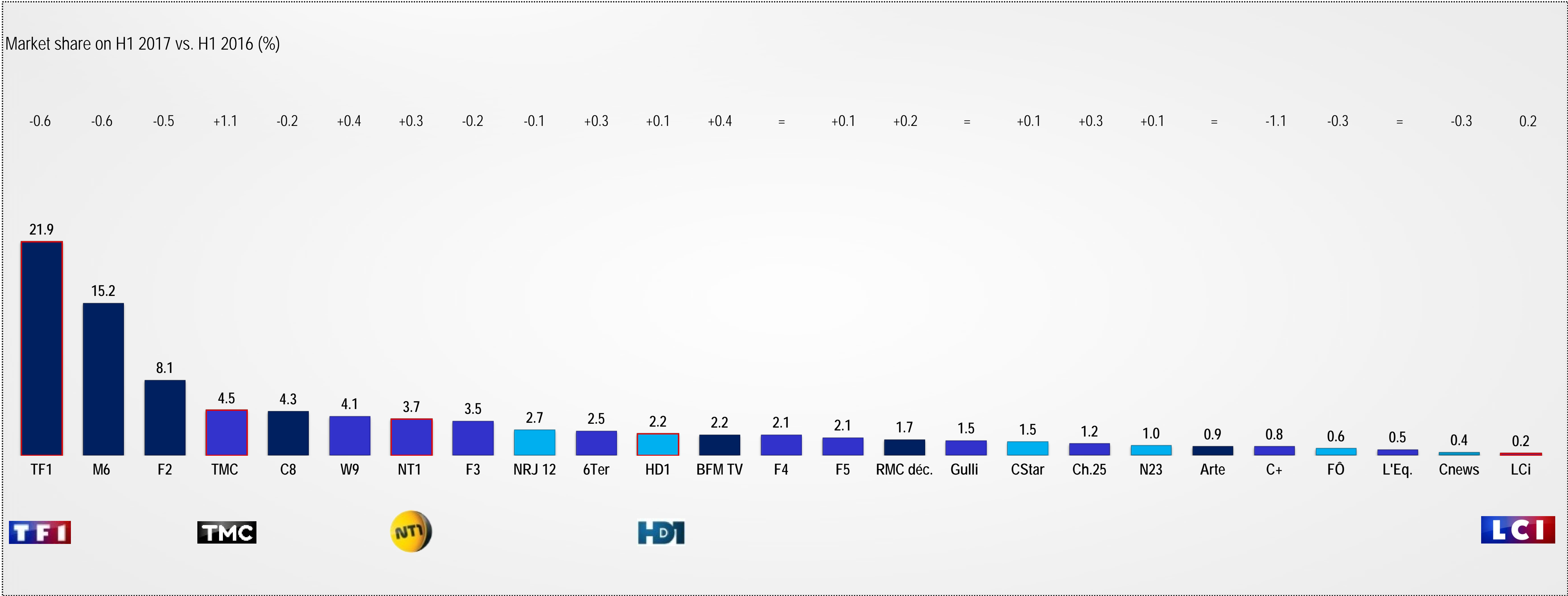


*Owned at 50%

**Owned at 70%

***LCI became part of TF1 group's free-to-air offer since 5 April 2016

SHARE OF VIEWING AMONG W<50PDM – H1 2017

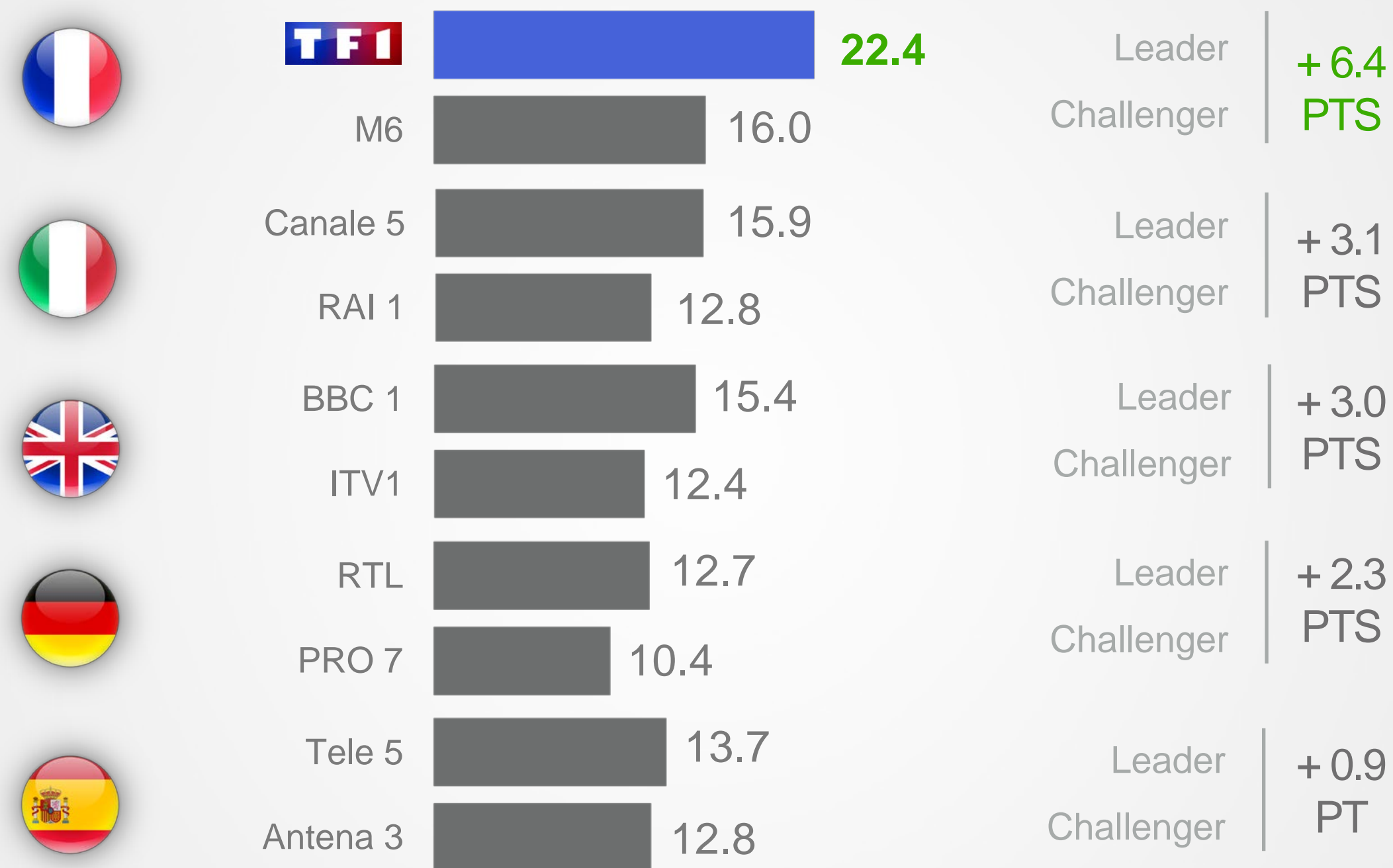


Source: Médiamétrie – Médiamat

2016: THE TF1 CORE CHANNEL KEEPS ITS UNRIVALLED STATUS IN EUROPE AS THE LEADER IN ITS MARKET

A UNIQUE LEAD OVER ITS MAIN RIVAL ON COMMERCIAL TARGETS

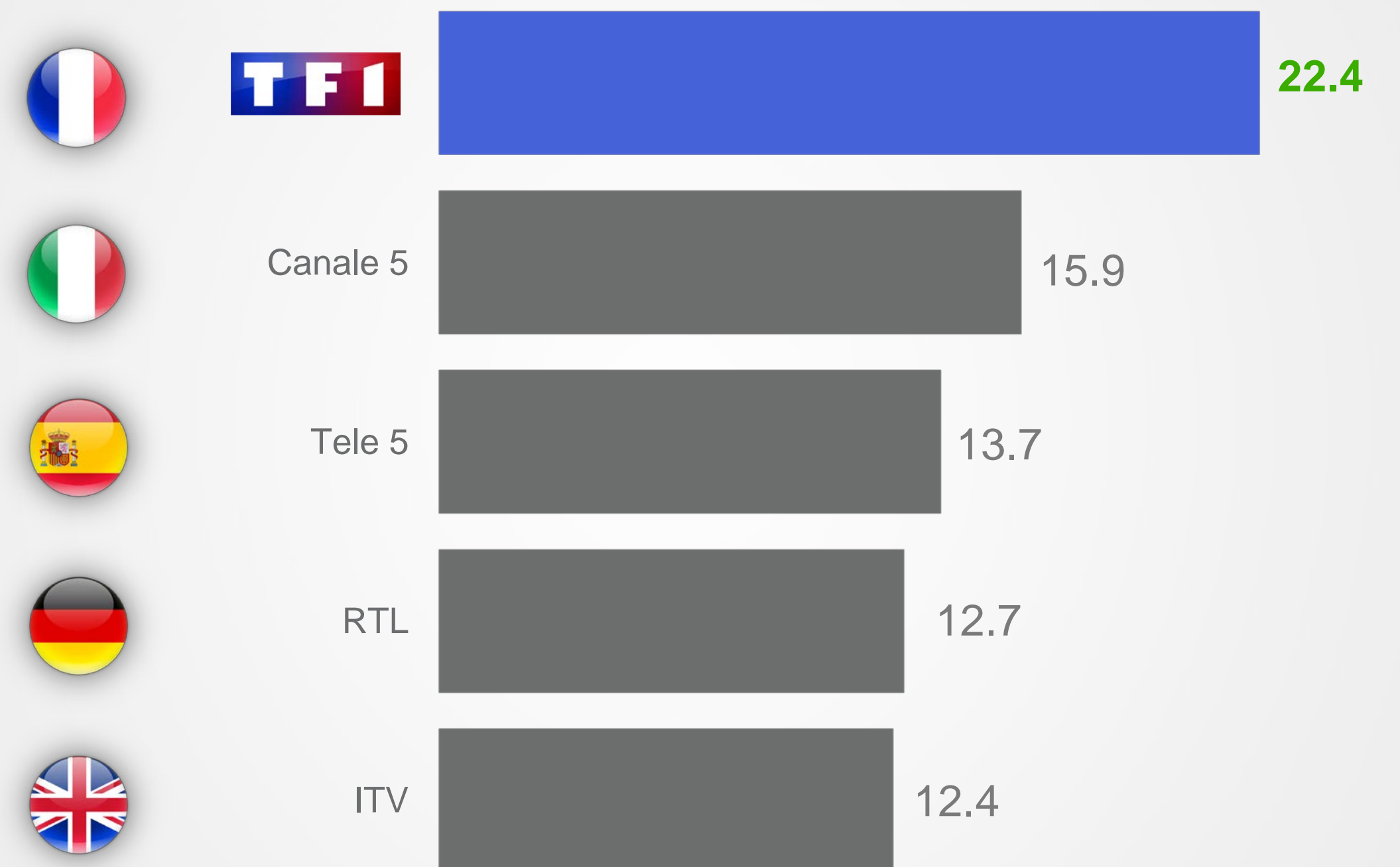
(% AS WITH REFERENCE COMMERCIAL TARGET IN 2016) DIFF. VS CHALLENGER:



Source: Médiamétrie (France) – W<50PDM / Eurodata TV – BARB - Kanter Media (UK) – 16-44 year-olds / Eurodata TV – AGB – GFK (Germany) – 14-49 year-olds / Kantar Media (Spain) – 18-59 year-olds ABCD hab. Towns > 10,000 inhab. / Eurodata TV – Auditel – AGB Nielsen (Italy) – 15-64 year-olds

THE STRONGEST AUDIENCE SHARE FOR A PRIVATE LEADING EUROPEAN CHANNEL

(% AS WITH REFERENCE COMMERCIAL TARGET IN 2016)



Source: Médiamétrie (France) – W<50PDM / Eurodata TV – BARB - Kanter Media (UK) – 16-44 year-olds / Eurodata TV – AGB – GFK (Germany) – 14-49 year-olds / Kantar Media (Spain) – 18-59 year-olds ABCD hab. Towns > 10,000 inhab. / Eurodata TV – Auditel – AGB Nielsen (Italy) – 15-64 year-olds

BUILD A MULTICHANNEL GROUP COMBINING POWER AND TARGETING

TF1

THE PREMIUM AND UNIFYING CHANNEL

4+ ind. / W<50PDM



TMC

NEW BENCHMARK CHANNEL FOR 25-49 YEAR-OLDS
25-49 year-olds / high SPC



NT1

THE UNMISSABLE CHANNEL FOR MILLENNIALS

15-35 year-olds



HDI

THE BEST IN DRAMA FOR W<50PDM

35-50 year-old women



LCI

FINGER ON THE NEWS PULSE WITH MAJOR SIGNATURES
25-59 year-olds / high SPC



OPPORTUNITIES FOR STRONG TV CONTENT

PREMIUM CONTENT CONTINUES TO ATTRACT VIEWERS

Entertainment



6.3 million viewers

Sports



More than 6.4 million viewers

US series



Up to 7.1 million viewers

RENEWED CONTENT WITH SUCCESS IN ALL PROGRAMME CATEGORIES

Entertainment



Season 2



Access

French drama



6x52'

Information



Prime-time documentary

THE MAIN CHALLENGES OF THE **TF1** GROUP

CORE BUSINESS

TODAY...

- ▶ Develop a segmented and contributive multichannel offer
- ▶ Increase the profitability of our core business - linear TV (TF1)
- ▶ Monetise content in TV channels and MYTF1



...TOMORROW

- ▶ Develop new audiences and new advertising inventories on linear TV as well as on digital
- ▶ Monetize with advertisers our customer knowledge
- ▶ Increase our production of proprietary content



ENTERTAINMENT AND THE DEVELOPMENT OF BRANDS

- ▶ Generate new sources of revenue...
- ▶ ...creating and growing talents and brands

THREE GROWTH TERRITORIES:

DTT

DIGITAL

PRODUCTION

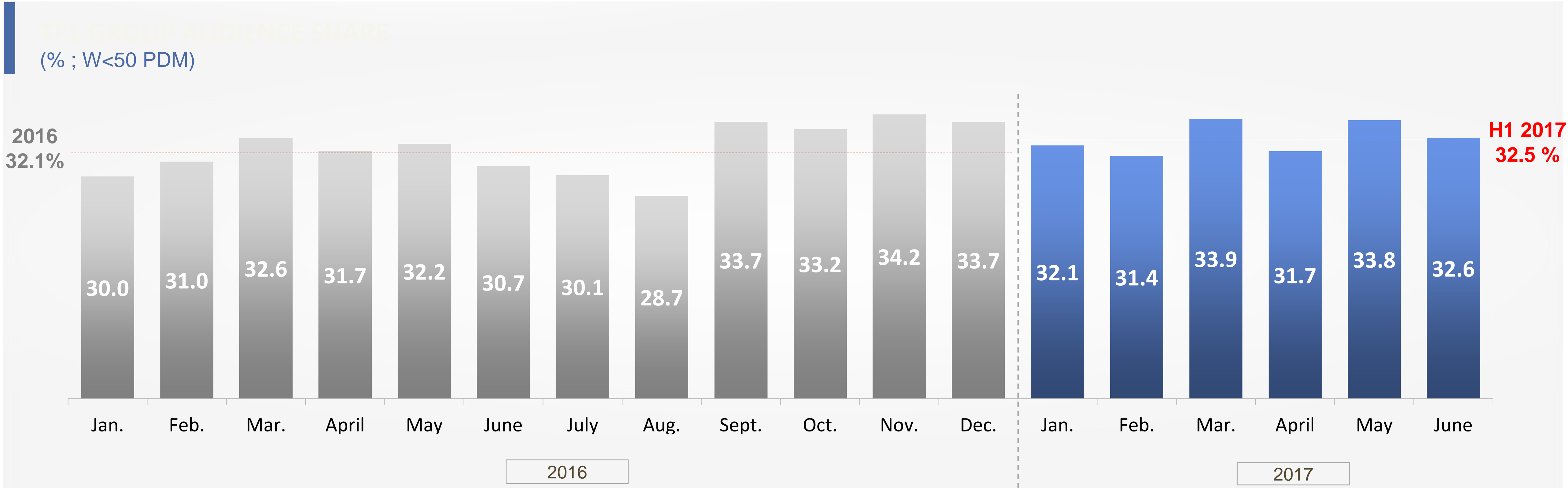


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H1 2017 PRESENTATION

1

GROUP RATINGS INCREASE IN THE FIRST HALF-YEAR THANKS TO THE MULTICHANNEL STRATEGY



- The W<50PDM ratings for the Group's five free-to-air channels increased 1.1 pts year-on-year in H1 2017 to 32.5%

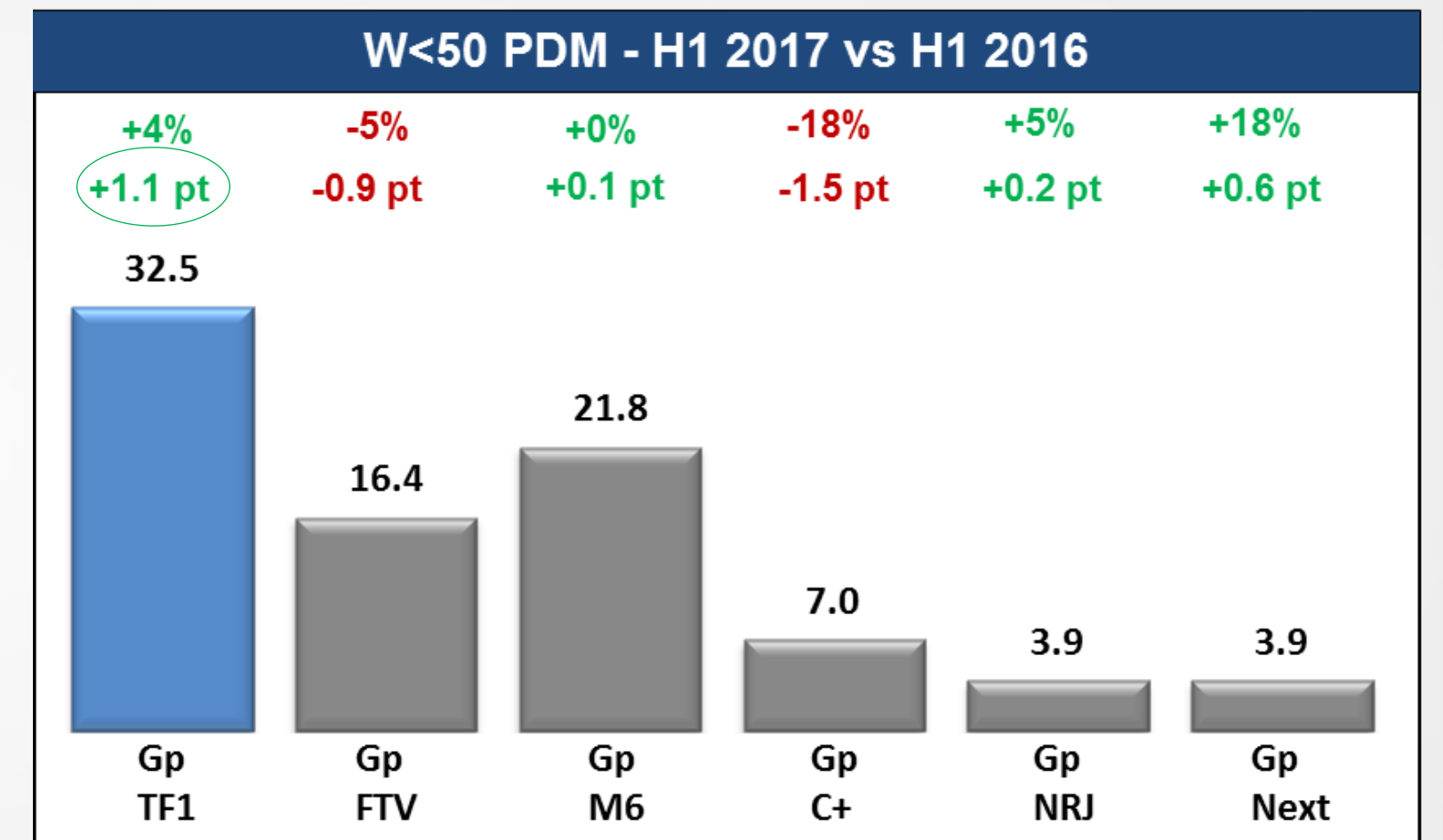
Source: Médiamétrie – Médiamat

GROUP AND TF1 CHANNEL RATINGS IN H1



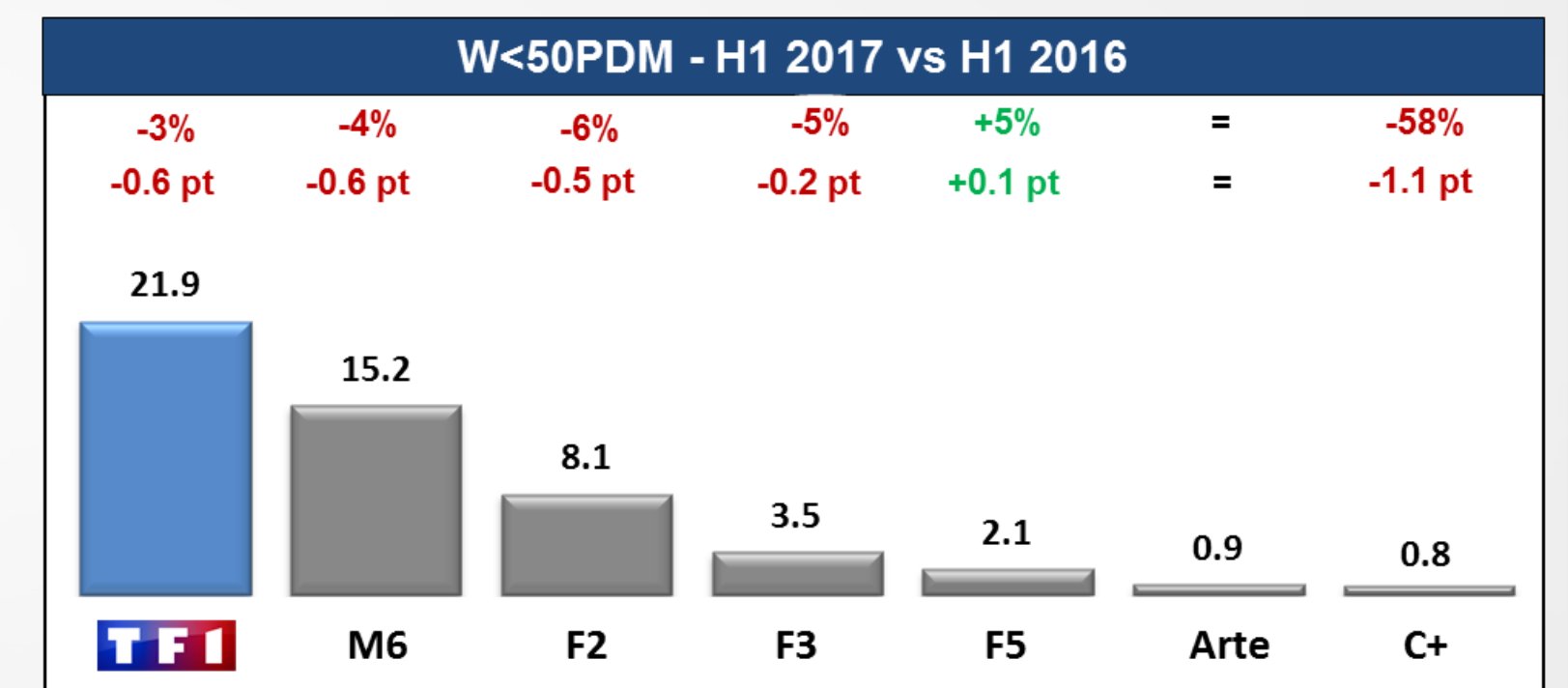
THE MULTICHANNEL STRATEGY PRODUCES RESULTS

- Strongest increase in Group ratings with W<50 PDM targets (+1.1 pts)
- Increased lead over competitors
(10.7 pts in H1 2017 vs. 9.7 pts ahead of main private competitor)



CHANNEL REINFORCES LEAD ON TARGETS OVER COMPETITORS

- TF1 leads W<50 PDM targets in every day-part, including:
 - Leadership reinstated in access* (*The Wall*)
 - Powerful in prime time** (29% audience share with W<50PDM in H1 2017) driven by major programme brands (*The Voice, Koh-Lanta*)



1

DTT CHANNEL RATINGS: TMC, NT1, HD1

TMC

SUCCESSFUL REPOSITIONING ON TARGETS

- New DTT leader on targets in H1 2017

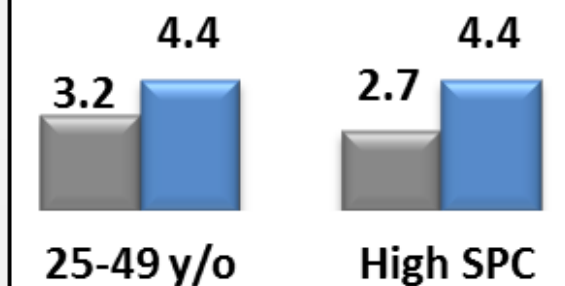


- Well-established programme with an average 1.3 million viewers in H1 2017

H1 2017 vs H1 2016

+38%
+1.2 pt

+63%
+1.7 pt



CONTINUES PROGRESSING

- Audience share has increased non-stop in last 3 years on 15-34 years-old target

H1 2017 vs H1 2016

+9%
+0.3 pt



HD1 YEAR-ON-YEAR INCREASE

- 9 out of the 10 best ratings for the latest new DTT channels in H1 2017
- Including the record of 1.4 million viewers (*Section de recherches*)

H1 2017 vs H1 2016

+5%
+0.1 pt



THE TF1 GROUP GROWS STRONGER ON KEY CONTENT (1/2)

NEWS & DIGITAL: THE GROUP NEWS LEADER IN H1

- Early launch of the Presidential campaign in June 2016 with *Vie Politique*
- *Le Grand Débat* on March 20, 2017: 10.3 million viewers (TF1 + LCI) and 3.3 million video views*
- News growth in replay: 531,000 replay viewers for the *Emmanuel Macron, les coulisses d'une victoire* documentary (ranking in top-7 replay ratings in May 2017)



LCI NO. 2 NEWS CHANNEL SINCE FEBRUARY 2017

- 0.7% audience share of 4+ individuals in H1
- 0.6 % audience share of higher socio-professional categories in H1



THE TF1 GROUP GROWS STRONGER ON KEY CONTENT (2/2)

TF1 RENEWAL IN ACCESS

- Entertainment: *The Wall*
- French drama (summer saga): *Demain Nous Appartient*



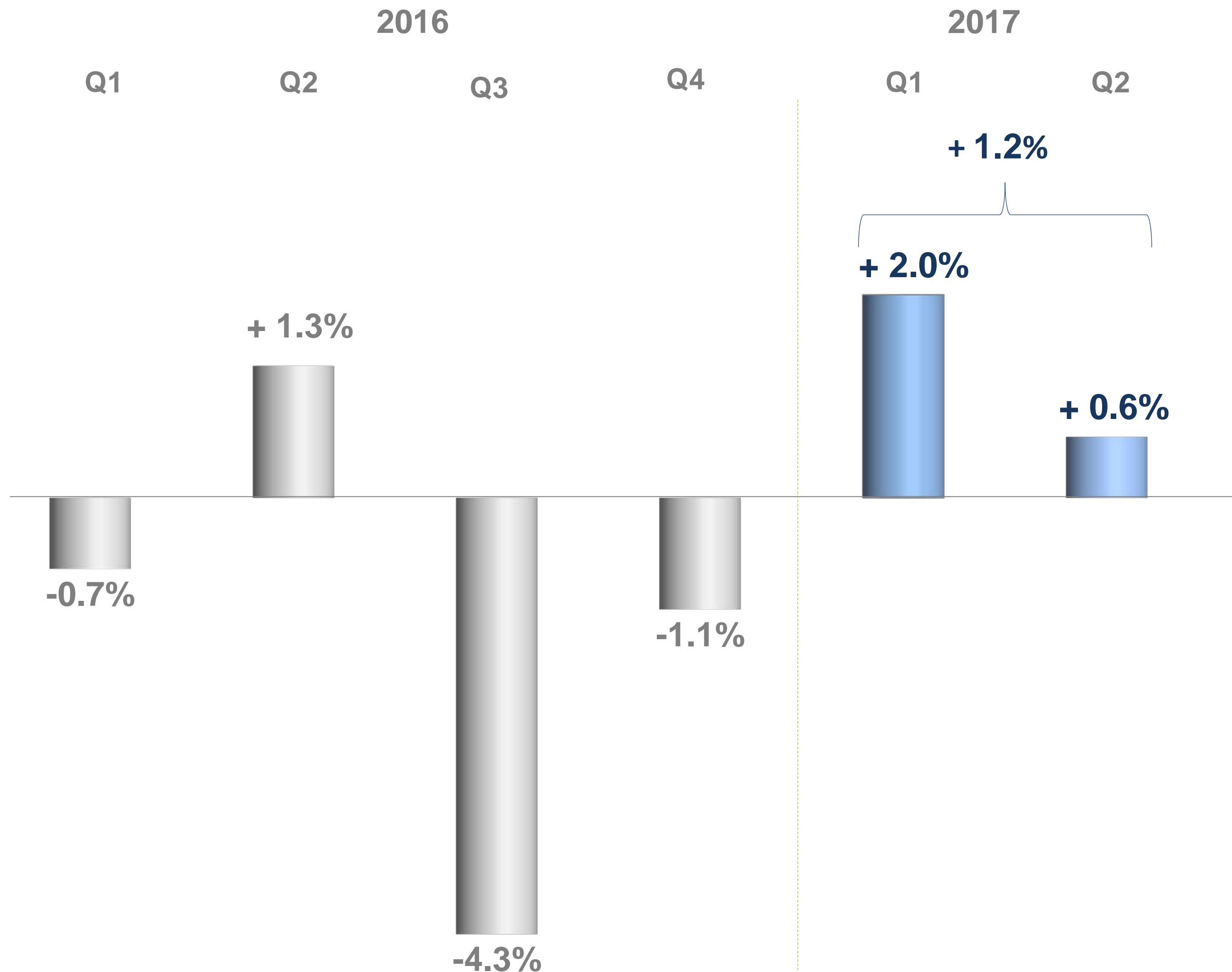
CONTINUED SUCCESS FOR FRENCH DRAMA

- Up to 6 million viewers: *Juste un regard*, *Alice Nevers*, *Munch*



1

INCREASE IN H1 NET AD REVENUES FOR THE 5 CHANNELS THANKS TO THE MULTICHANNEL STRATEGY



INCREASE IN AD REVENUES OF THE 5 FREE-TO-AIR CHANNELS: + 1.2% in H1 2017, to €745.2m

- Q1 2017: 1.3 pts increase in **net** market share
- Q2 2017: 1.2 pts increase in **gross** market share

THE GROUP IS PURSUING ITS TRANSFORMATION: MONETISATION OF CONTENT (1/4)

SUCCESS OF BRAND CONTENT



360° approach for a major food retailer

IMPROVED SPONSORSHIP PERFORMANCE THANKS TO PRODUCT PLACEMENT

TF1 Group
+27%
growth in Q1

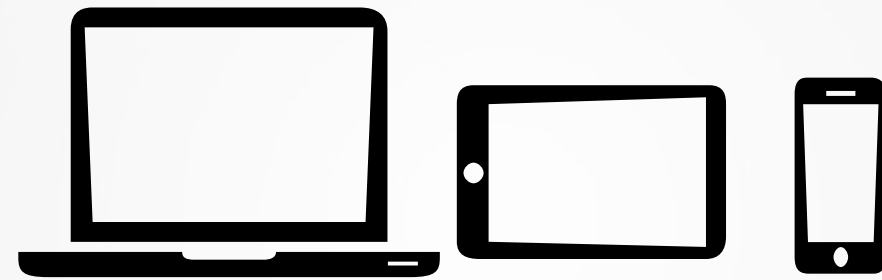
TF1 Group
+28%
growth in Q2

ENLARGED INVENTORY FOR DIGITAL OFFER



THE GROUP IS PURSUING ITS TRANSFORMATION – DIGITAL (2/4)

AUTHENTICATION MANDATORY ON MYTF1 SINCE APRIL



- 12.5 million people identified so far (+3.5 million since April)
- 2018 target: 18 million

EUROPEAN ALLIANCE OF PREMIUM DIGITAL BROADCASTERS EBX (EUROPEAN BROADCASTER EXCHANGE)



MEDIASET*espana.*

- 4 major countries covered from start, office in London
- Operational in early 2018 to address European budgets in an environment of international competition

FIRST INVESTMENT OF ONE INNOVATION FUND



Beauty testing platform

MAJOR PARTNER OF VIVATECH



THE GROUP IS PURSUING ITS TRANSFORMATION – STUDIOS & ENTERTAINMENT (3/4)

MUSIC



Signing of *Maître Gims*



First diamond disc, tour and preparation of live album

CINEMA



4.5 million entries



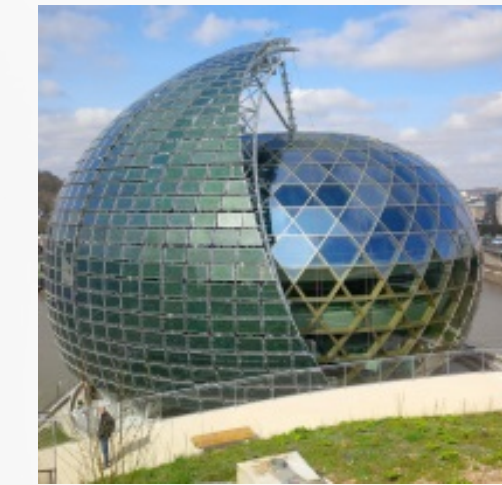
3.5 million entries



1.3 million entries

- 14 cinema releases in H1
- 3 of which sold over 1 million entries

LA SEINE MUSICALE



- Opened in April 2017
- Varied line up of shows : *West Side Story*, *Les étés de la danse*, *Michel Sardou*

VOD



- No. 1 platform in declared use according to latest CNC study (up 3 places in 4 years)

TF1 GAMES / DUJARDIN



- Launch of *Wet Head*
- Escape Game* wins 2017 "Grand Prix du Jouet" award in adventure game category

TELESHOPPING



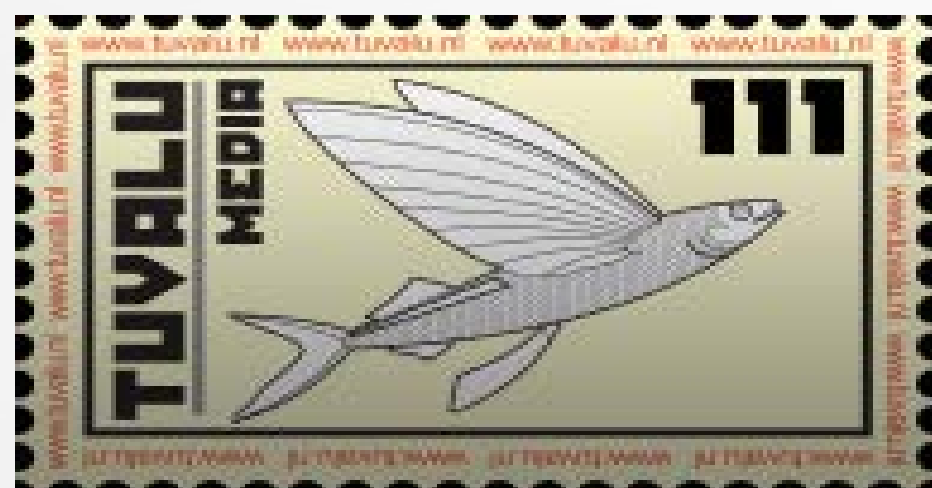
- Best sellers in 2017: Minci Cook, Range Max, etc.
- 30th birthday
- Promo video for the DVD release of *Alibi.com* film produced by TF1 Studio

2

THE GROUP IS PURSUING ITS TRANSFORMATION: NEWEN – PRODUCTION (4/4)



INTERNATIONAL DEVELOPMENT AND STRATEGIC PARTNERSHIP

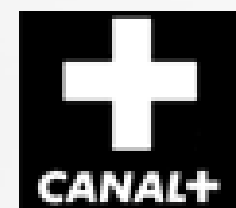


Acquisition of a majority stake



Partnership on distribution of exclusive programmes

NEW PROGRAMMES AND NEW CLIENTS



Ben (6x52')



Souviens-toi (6x52')



A UNIQUE BRAND FOR A RECOGNISED SOCIAL RESPONSIBILITY POLICY

"TF1 INITIATIVES"

SOLIDARITY



3 SOLIDARITY CAMPAIGNS ON OUR ANTENNAS

Pièces jaunes, Restos du Cœur, Sidaction

UNITING TO HELP THE MOST FRAGILE

DIVERSITY



SIGNATURE OF 4TH DISABILITY AGREEMENT

UNIFYING OUR DIFFERENCES TO MAKE THEM INTO A STRENGTH

SUSTAINABLE SOCIETY



**PARTNER OF
'2017 JEUNES POUR
L'ENVIRONNEMENT EPE-LCI'
AWARDS**

**EXPLORING FUTURE LIFESTYLES
AND CONSUMER BEHAVIOUR**

DOW JONES SUSTAINABILITY INDEX

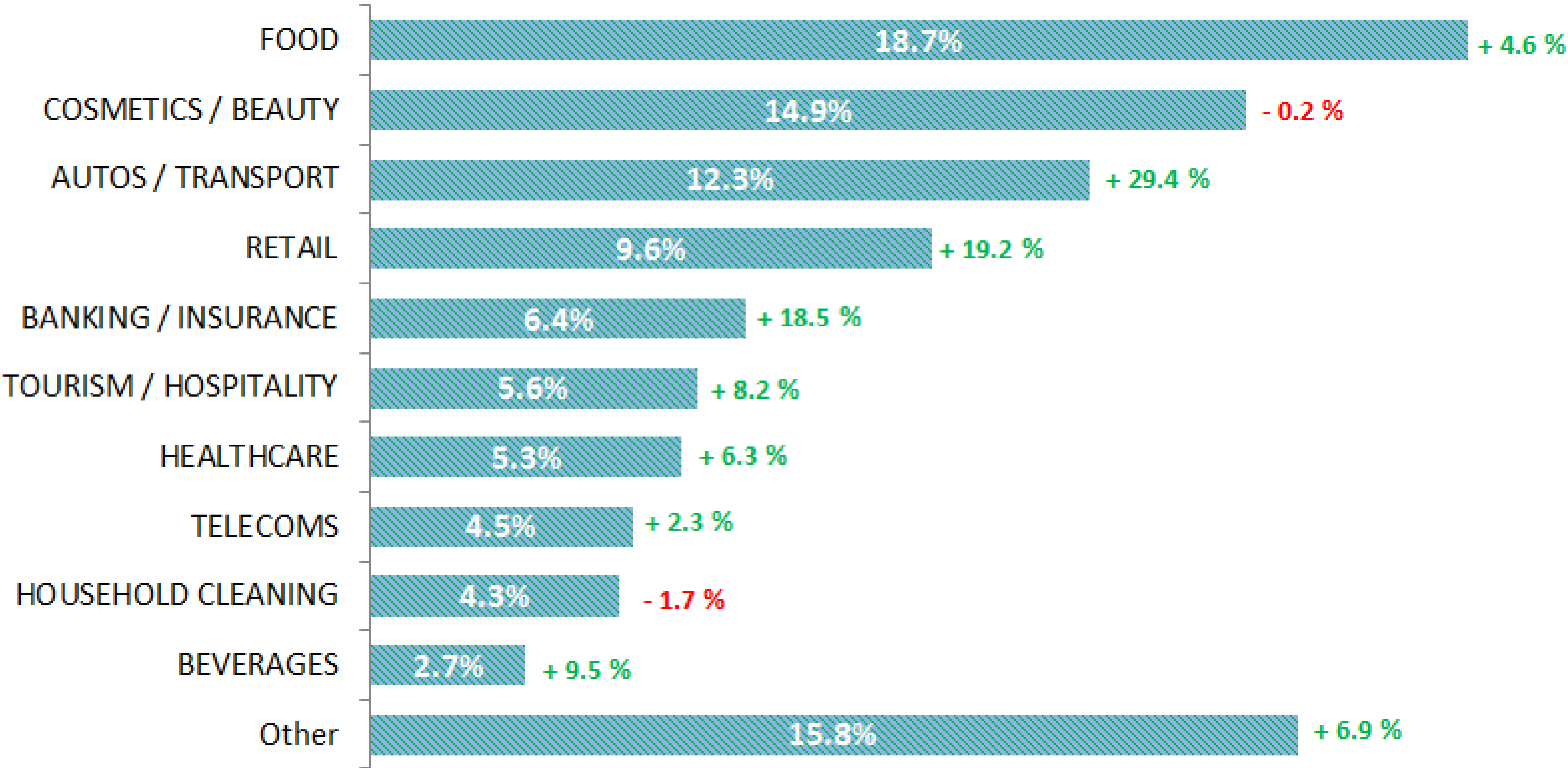
- January 2017: GOLD ranking for CSR performance from RobecoSam agency, enabling inclusion in DJSI index



FIRST HALF 2017 CONSOLIDATED REVENUE BREAKDOWN

€m	H1 2017	H1 2016	Var. €m	Var. %
BROADCASTING	855.4	838.1	17.3	2.1%
FREE PLATFORMS	770.7	762.2	8.5	1.1%
<i>TV advertising</i>	745.2	736.2	9.0	1.2%
<i>Other revenues</i>	25.5	26.0	(0.5)	-1.8%
OTHER PLATFORMS AND RELATED ACTIVITIES	84.7	75.9	8.8	11.6%
STUDIOS & ENTERTAINMENT	181.3	187.1	(5.8)	-3.1%
TOTAL REVENUE	1,036.7	1,025.2	11.5	1.1%

TRENDS IN GROSS ADVERTISING SPEND FOR TF1 GROUP CHANNELS



Source: Kantar Média, H1 2017 vs. H1 2016. Gross advertising spend (excluding sponsorship) for the five free-to-air channels

EVOLUTION OF COST OF PROGRAMMES OF THE FREE-TO-AIR CHANNELS

(5 channels) (4 channels at Q1
and 5 channels at Q2)

€m	H1 2017	H1 2016 *	Var. €m	Var. %
Entertainment	141.7	142.9	(1.2)	-0.8%
TV dramas*/TV movies/Series/Theatre	148.3	150.8	(2.5)	-1.7%
Sports (excl. one-off sporting events)	30.6	21.7	8.9	41.0%
News	75.0	66.8	8.2	12.3%
Movies	80.3	69.9	10.3	14.9%
Youth	6.3	7.8	(1.5)	-19.0%
TOTAL EXCL. ONE-OFF SPORTING EVENTS	482.2	459.9	22.3	4.8%
<i>One-off sporting events</i>	-	37.9	(37.9)	ns
TOTAL INCL. ONE-OFF SPORTING EVENTS	482.2	497.8	(15.6)	-3.1%

* The cost of programmes published for H1 2016 was €517.5 million, including €19.7 million of non-recurring expenses. Excluding non-recurring expenses, the cost of programmes was €497.8 million.

CONSOLIDATED INCOME STATEMENT

€m	H1 2017	H1 2016	Var. €m	Var. %
CONSOLIDATED REVENUE	1,036.7	1,025.2	11.5	1.1%
Total costs of programmes	(482.2)	(497.8)	15.6	-3.0%
Other charges, depreciation, amortization, provision	(446.9)	(469.9)	23.0	-4.9%
CURRENT OPERATING PROFIT	107.6	57.5	50.1	ns
<i>CURRENT OPERATING MARGIN</i>	<i>10.4%</i>	<i>5.6%</i>		<i>+4.8 pts</i>
Other operating income and expenses	(11.6)	(54.7)	43.1	ns
OPERATING PROFIT	96.0	2.8	93.2	ns
Cost of net debt	(1.1)	(0.6)	(0.5)	ns
Other financial income and expenses	5.7	(1.1)	6.8	ns
Income tax expense	(33.2)	(0.2)	-33.0	ns
Share of profits / (losses) of associates	7.1	0.1	7.0	ns
Net profit from continuing operations	74.5	1.0	73.5	ns
Post-tax profit from discontinued/held-for-sale operations	-	-	-	-
NET PROFIT	74.5	1.0	73.5	ns
Net profit attributable to the Group	74.6	(0.6)	75.2	ns
<i>Attributable to non-controlling interests</i>	<i>(0.1)</i>	<i>1.6</i>	<i>(1.7)</i>	<i>ns</i>

RECOVER PLAN

€14m recurrent savings in H1*

- Organisation & Transformation: €5m
- Purchasing Optimisation: €3m
- Digitalisation: €6m

*not concerning programming costs

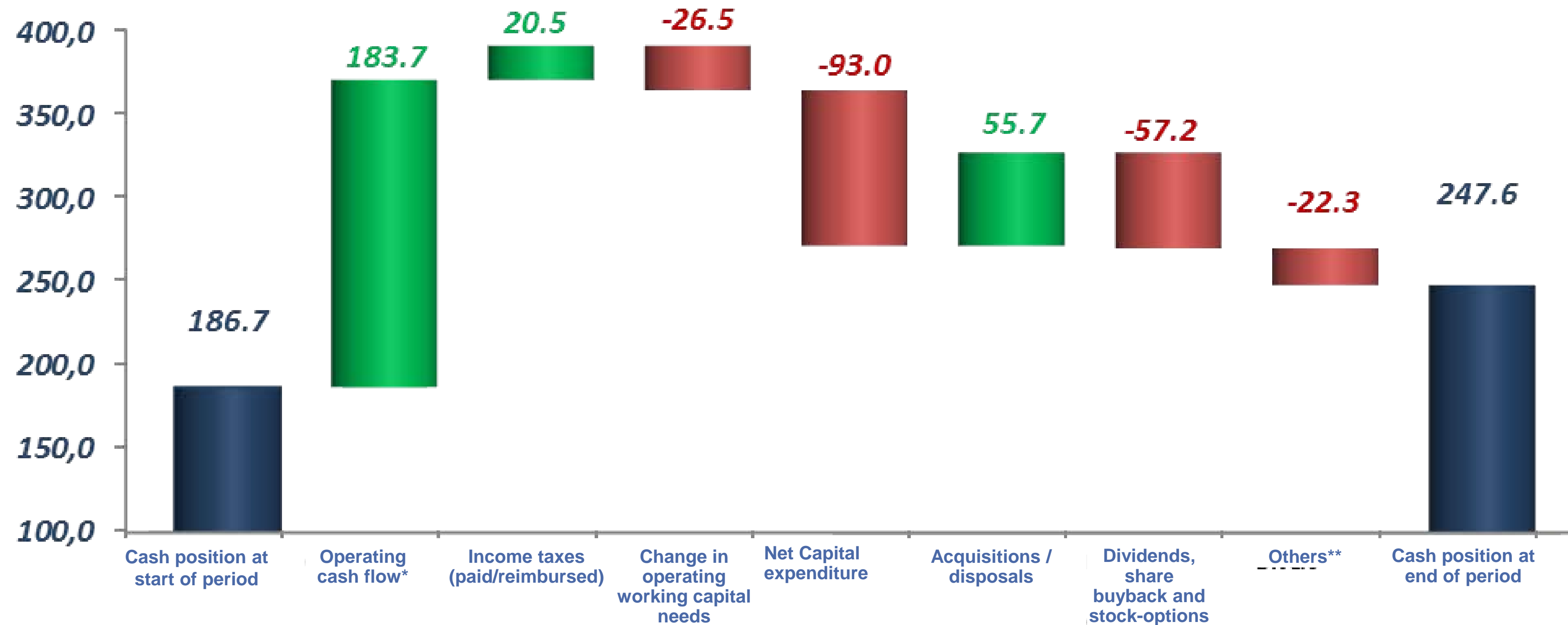
CONSOLIDATED BALANCE SHEET

CONSOLIDATED ASSETS (€m)	June 30th 2017	December 31st 2016	Var. €m
Total non-current assets	1,081.4	1,093.1	(11.7)
Total current assets	2,320.9	2,122.6	198.3
Held-for-sale assets	-	-	-
TOTAL ASSETS	3,402.3	3,215.7	186.6
Net cash (+)	247.6	186.7	60.9

CONSOLIDATED LIABILITIES (€m)	June 30th 2017	December 31st 2016	Var. M€
Total shareholders' equity	1,503.3	1,492.6	10.7
<i>shareholders' equity attributable to the Group</i>	<i>1,503.3</i>	<i>1,493.4</i>	<i>9.9</i>
Total non-current liabilities	345.0	322.0	23.0
Total current liabilities	1,554.0	1,401.1	152.9
Liabilities related to held-for-sale operations	-	-	-
TOTAL LIABILITIES & SHAREHOLDERS' EQUITY	3,402.3	3,215.7	186.6

EVOLUTION OF THE NET CASH POSITION

Evolution of the net cash position 2017.06



* Operating cash flow – cost of net debt – income tax expense

** Cash inflows/outflows from/on acquisitions of financial assets, dividends received, other cash flows from investing activities, other transactions between shareholders, cash inflows from new debt contracted, repayment of debt (including finance leases), net interest paid (including finance leases)

NCP EVOLUTION 2016.06

700.8	121.2	-44.5	-37.8	-101.1	-327.6	-177.3	-0.6	133.1
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OUTLOOK

SECOND HALF OF THE YEAR: CONFIRMATION OF MOMENTUM INITIATED

PROGRAMMING

- Access broadcast on TF1 of the summer saga: *Demain nous appartient*
- Return of major entertainment brands: *The Voice Kids*, *Danse avec les Stars*



DISTRIBUTION

- Ready to enforce our position on TF1 Premium



LCI: NEW FACES

- Many new faces from Morning show to the Access talk show, throughout the day



STUDIO71 FRANCE

- Launch in September in connection with Studio 71, world no. 3 MCN



INITIATION OF ADVERTISING AIRTIME SALES IN BELGIUM

- Signature of contracts in Q4 2017
- Launch in early 2018



THE TF1 GROUP IS REITERATING ITS FULL-YEAR GUIDANCE

2017

- Maintain our share of the advertising market
- Confirmation of the programme of recurring cost savings at around €25m to €30m

2019

- Growth in non advertising revenue for the five free-to-air channels expected to account at least one third of consolidated revenue
- Hold the average annual costs of programme (excluding major sports events) at €980m for the five free-to-air channels for the three coming years
- Objective of current double-digit current operating margin for the group

2018-2020 VISION

Create strong links
Let's share positive vibes

**A leading group in media content and entertainment
integrated, from production to distribution**



A multichannel, multimedia, multi-activity group



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APPENDIX

2016 - ANNUAL CONSOLIDATED REVENUE BREAKDOWN

€m	2016	2015	Var. €m	Var. (%)
BROADCASTING	1,669.9	1,736.1	(66.2)	-3.8%
FREE PLATFORMS	1,517.1	1,569.0	(51.9)	-3.3%
TV Advertising	1,455.3	1,469.9	(14.6)	-1.0%
Other Revenues	61.8	99.1	(37.3)	-37.6%
OTHER PLATFORMS AND RELATED ACTIVITIES	152.8	167.1	(14.3)	-8.6%
STUDIOS & ENTERTAINMENT	392.8	268.2	124.6	46.5%
TOTAL REVENUE	2,062.7	2,004.3	58.4	2.9%

€m	2016	2015	Var. €m	Var. (%)
CONSOLIDATED REVENUE	2,062.7	2,004.3	58.4	2.9%
GROUP TV ADVERTISING	1,530.1	1,554.2	(24.1)	-1.6%
OTHER REVENUES	532.6	450.1	82.5	18.3%

2016 - COST OF PROGRAMMES OF THE FREE-TO-AIR CHANNELS

€m	2016	2015	Var. €m	Var. (%)
Entertainment	269.5	285.5	(16.0)	-5.6%
TV dramas* / TV movies / Series / Theatre	312.1	316.7	(4.6)	-1.5%
Sports (excl. one-off sporting events)	49.0	45.0	4.0	8.9%
News**	140.7	107.3	33.4	31.1%
Movies	174.1	159.9	14.2	8.9%
Youth	15.1	15.0	0.1	0.7%
TOTAL EXCL. ONE-OFF SPORTING EVENTS	960.5	929.4	31.1	3.3%
One-off sporting events	46.1	26.8	19.3	ns
TOTAL INCL. ONE-OFF SPORTING EVENTS AND EXCL. NON-CURRENT CHARGES	1,006.6	956.2	50.4	5.3%

NON-CURRENT CHARGES	2016	2015	Var. €m	Var. (%)
Non-current expenses relating to co-production shares	25.4	-	ns	ns
Cost of LCI from 1st January to 4th April 2016 included in non-current charges	8.2	-	ns	ns

* Excludes €25.4 million of non-current expenses relating to co-production shares in respect of TF1 Group Investments in French drama productions

** Includes the cost of LCI from April 5th to December 31st, 2016

2016 - CONSOLIDATED INCOME STATEMENT

€m	2016	2015	Var. €m	Var. (%)
CONSOLIDATED REVENUE	2,062.7	2,004.3	58.4	2.9%
Total costs of programmes	1,006.6	956.2	50.4	5.3%
Other charges, depreciation, amortization, provision	926.7	890.1	36.6	4.1%
CURRENT OPERATING PROFIT	129.4	158.0 *	(28.6)	-18.1%
<i>CURRENT OPERATING MARGIN</i>	6.3 %	7.9 %		
Other operating income and expenses	(83.7)	(16.8)	(66.9)	ns
OPERATING PROFIT	45.7	141.2 *	(95.5)	-67.6%
Cost of net debt	(1.2)	1.1	(2.3)	ns
Other financial income and expenses	(4.5)	(3.2)	(1.3)	40.6%
Income tax expense	(5.9)	(42.3)	36.4	- 86.1%
Share of profits / (losses) of associates	9.9	6.5	3.4	52.3%
NET PROFIT FROM CONTINUING OPERATIONS	44.0	103.3	(59.3)	-57.4%
Post-tax profit from discontinued/held-for-sale operations	-	-	-	ns
NET PROFIT	44.0	103.3	(59.3)	-57.4%
Net profit attributable to the Group	41.7	99.9	(58.2)	- 58.3%
Attributable to non-controlling interests	2.3	3.4	(1.1)	- 32.4%

* Includes the gain arising on the deconsolidation of Eurosport France in Q1 2015 (33.7 million euros)

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