



# THE “FOUR-SCREEN” STRATEGY OF THE TF1 GROUP

May 2011



## THE FOUR-SCREEN STRATEGY OF THE TF1 GROUP INVOLVES USING NEW MEDIA AND TECHNOLOGICAL OPPORTUNITIES.

The TF1 Group distributes and showcases its content using all available media: the internet, television, mobile phones and pads.

### ● TF1 STRATEGY

- Be present on all available media and deliver content of consistently high quality.
- Showcase Group content.
- Strengthen and enhance the TF1 signal through its main medium: television
- Provide catch-up content that appeals to viewers while also attracting advertisers

### ● TF1 OFFERING

- An offering segmented to reflect different types of use and based on appropriate business models
- Programmes that remain homogeneous from one medium to another, to maintain links with viewers and ensure that products retain their specific characteristics
- Free high-quality content coexisting with other payable services or content, depending on the opportunities for monetisation

### ● OPPORTUNITIES

- Reap the benefits of growth in new media
- Gain expertise in technological developments and take advantage of new uses, including multi-tasking
- Maintain TF1's leading position through an innovative, proactive approach

### ● OBJECTIVES

- Support and anticipate new uses
- Promote the TF1 brand
- Find new sources of monetisation and income by:
  - ✓ marketing advertising space
  - ✓ selling products to consumers
  - ✓ receiving a licence fee from broadband operators

### Key figures

On average, 15/24 year-olds receive 45 media or multimedia contacts per day, i.e. five contacts more than a year ago\*.

Households with access to MyTF1: 6.5 million.

Equipped with touch pads: 546,000 households ; i.e. 2%.

TF1 is the first media company to include community functions in an app for iPad and iPhone.

\* Source Médiamétrie / Media in life - 2010 and Médiamétrie / GFK January – March 2011



## 'TF1.FR, PLUS DE CE QUE VOUS AIMEZ.FR' THE FULL WEALTH OF TF1 AND MORE, WITH AN OFFERING TAILORED TO YOUR REQUIREMENTS!

As a leading media player attentive to the needs of its audience, TF1 is adapting its website to reflect new online behaviours. TF1.fr, a general multi-subject portal that has ranked among the leaders since its founding in 1999, is taking on a new look that reflects its role as an essential complement to the TV channel.

TF1.fr now presents the full wealth and expertise of the TV channel. Visitors can choose their content to suit, and take part in free discussion and exchange. The new website is modern, informative, entertaining and close to viewers, with a large catalogue of videos in all existing formats (catch-up TV, best-of, unseen content, etc.). This initiative was implemented in the light of several facts:

- ➔ the Internet is now part of the daily lives of the French public, who use it primarily as a source of entertainment and – increasingly – for news
- ➔ web users expect a complete video offering meeting all their requirements and reflecting the dual need for information and entertainment
- ➔ active participation by web users has become natural.

### ● TF1.FR, A COMPLEMENT TO THE TV CHANNEL

The TV channel is at the heart of the TF1.fr website, which lets viewers and web users build on and extend their experience with TF1, its programmes and journalists, presenters and personalities. Content is based on the two mainstays of the TF1 Group: news and entertainment.

From launch, the new website will include a benchmark news site along with 50 official sites on the main programmes, bringing fans the latest news, photos, videos and content on their favourite programmes, actors and presenters.

The presentation of the programme schedule has also been reviewed. The new site features an intuitive TV grid that can be reached from any page.

A large, benchmark video catalogue in a wide variety of formats. The TF1.fr site is innovating with an enhanced video offering.

More than 80 hours of TV programmes will be available in full just a few minutes after being shown on television and up to seven days afterwards, or even longer. This offering concerning all the main TF1 programmes: series, reality TV and flow programmes (magazines and entertainment), news bulletins, weather, news and sports magazines, children's programmes, teleshopping, etc.

This unique offering is available in HD from capture through to online broadcasting.

This online experience is completed and enhanced by an unrivalled catalogue including new content never before seen on the web. The objective is to cover all user lifestyles and requirements and never to lose an opportunity to bring web users into contact with TF1:

- ➔ TF1 proposes the channel signal live and in rebroadcast
- ➔ more than 17,000 videos will be available in short formats from site launch,
- ➔ a "best of", with the most amusing and impactful clips from the programme will be made available just a few minutes after broadcasting,

- ➔ a channel-surfing feature, not to be missed, reviewing the best moments of the previous day's TV,
- ➔ and, for the first time, a TF1 heritage catalogue, with 180 "cult video extracts" from the most popular TF1 programmes of the 1980s-1990s, such as *Lahaye d'honneur*, *Sacrée Soirée* and *Temps X*.

## ● ALL OF TF1 JUST FOR ME...

An original approach in which content consumption is tailored to requirements. The TF1.fr website and its content adapt to web users and their lifestyles. Visitors can select a made-to-measure experience – outline or analysis, entertainment or news – depending on their mood and needs. Implementing an original approach, the 17,000 videos available bring users a choice between short formats (extracts, channel surfing and programme outlines) and long formats (programmes in full) in order to meet requirements for a day-to-day, made-to-measure service in content consumption.

Closer ties and greater interactivity between web users and the TV channel. The TF1.fr website builds and encourages participation and discussion with visitors through chat rooms as well as through customisable everyday services. The emphasis is placed on close ties and relations with viewers and web users, through the page TF1 & Vous. Accessible from the navigation bar, TF1 & Vous is an opportunity for:

- ➔ web users to express their views and maintain a dialogue with TF1 (the most active benefit from special coverage online and will become ambassadors),
- ➔ the stars of the TV channel to meet fans and chat on TF1.fr twice a month,
- ➔ TF1.fr to stage a major event with live interactive coverage of reality TV programmes and football matches played by France's national team, in partnership with Facebook.

The site also offers opportunities for web users to discuss their favourite programmes and content through interactive areas (official forums chats, comments) on official programme sites.

## ● TF1.FR AT THE CUTTING EDGE

An innovative site. The new website aims to be innovative, with simple ergonomics, intuitive navigation and clear graphics and colour coding based on those of the television channel. At the same time, the videos boast unique quality of definition, beyond any standard, for an unmatched viewing experience. Alongside a 16/9 video player, TF1 is inventing high-definition catch-up TV: many programmes will be available for viewing, in their entirety, in HD.

## ● OTHER FEATURES ON TF1.FR:

- ➔ Games, in liaison with the channel, to prolong the entertainment experience... and maybe win prizes!
- ➔ Shopping with its programme brand, Téléshopping.



## TF1 APP FOR IPHONE AND IPAD



## TF1 LAUNCHES A FREE APP FOR IPAD AND IPHONE

TF1 is pursuing its policy to innovate and develop its multi-screen offering with the launch of an app for pads and smartphones.

The TF1 app features live programmes, catch-up TV, videos with exclusive bonuses, and the programme grid. TF1 is Europe's leading media company on Facebook with four million active fans, and the TF1 app is the first Facebook-connected media app.

### ● FRENCH VIEWERS' FAVOURITE PROGRAMMES NOW AVAILABLE FOR MOBILE VIEWING

The TF1 app lets viewers watch the channel live, in HD quality and with maximum viewing comfort. It also provides free, direct access to catch-up TV and exclusive bonus videos. In all, more than 80 hours of programmes will be available every week, representing the full variety and wealth of the TF1 grid.

### ● TF1, PIONEERING SOCIAL TV

Building on its full integration with Facebook, TF1 was the first media company to include community functions with an app for iPad and iPhone. The page TF1&Vous gives you direct access to the fan pages for TF1 programmes. It also lets you maintain a live conversation with its Facebook friends and join the fan communities. In this way, TF1 is consolidating its position as the first European media company on Facebook, with more than four million active fans.

Visit the App Store to download the TF1 iPad and iPhone apps:  
<http://itunes.apple.com/fr/app/tf1/id407248490?mt=8>

### Key figures

- 1.1 downloads since launch (16 weeks)
- 9 users out of 10
- I-phone top 5 of the week

#### Le Top i phone de la semaine :

1. Dr House : 149.544 CDP
2. Joséphine ange gardien: 43.477 CDP
3. JT 20h : 26.463 CDP
4. Téléfilms (>): 23.164 CDP
5. Confessions intimes : 19.276 CDP

CDP = pages downloaded





## ● MyTF1, A RESULT OF THE INNOVATION OF THE TF1 GROUP

TF1, Europe's leading media group and a forerunner in new media, conducts its relationship with the public in all media, including television, the web, mobile devices and, today, IPTV.

MyTF1 provides access to the entire TF1 universe. Users can re-watch a broad selection of programmes free of charge and access TF1 Vision's video on demand offer. The offer is rounded out by a number of services in a range of areas, such as news, sports and games. Free and interactive, MyTF1 is a family product accessible to all via the routers of Bouygues Telecom (Bbox), Orange (LiveBox) and Free (Free Box) and, in the long term the TV services of other operators.

MyTF1 reinvents the idea of close relations with customers – a treasured value for TF1.

## ● THE SERVICE:

→ MyTF1: the TF1 universe available on my TV.

MyTF1 brings TV viewers a new way of getting the most out of the favourite shows. It is a TV portal providing access to the enhanced world of TF1 programmes.

→ MyTF1: free of charge and accessible 24/7.

MyTF1 is accessible free of charge around the clock with no prior subscription for customers of partner operators. Using their routers, TV viewers watching TF1 can at any moment access MyTF1 by pressing OK on their remote control.

→ MyTF1: enhanced TF1 TV.

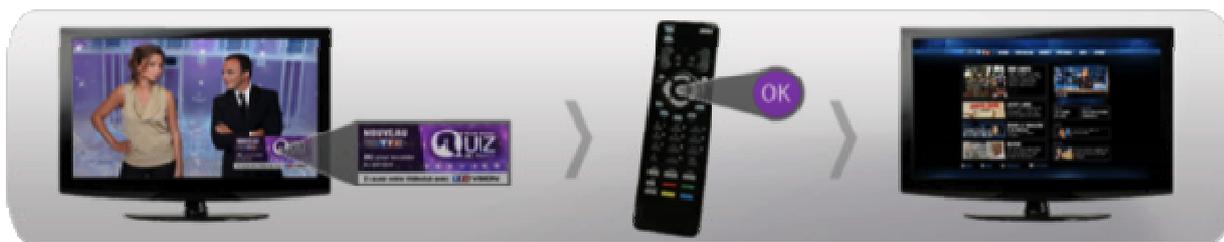
MyTF1 features a wide selection of freeview and pay-to-view content in one and the same service:

- ✓ Catch-up for numerous TF1 programmes, for unlimited viewing free of charge for one week after initial broadcast.
- ✓ TF1 news, with behind-the-scenes footage, trailers for the evening's programmes and original bonuses.
- ✓ Services with the latest news, weather and sports results.

→ But MyTF1 is also an offer of premium content:

- ✓ A video club with 3,000 films from TF1 Vision, including exclusive first-run films, entertainment, cartoons and TV series for rent starting at €0.99.
- ✓ Games, votes and interactive competitions from the channel.  
A window remains open permanently on the channel so viewers don't have to interrupt their show.

- ACCESS



MyTF1 is available free of charge 24/7 with no prior subscription for all the customers of partner operators (Bouygues Telecom, Orange, Free).

Users access the service from the TF1 television channel by pressing on OK on their remote control. Browsing is simple using the up/down, right/left and back buttons. They can return to their current programme at any time by pressing Quit.

Other access types are available depending on the services provided by the operator (information sheet, homepage, etc.).

MyTF1 was designed to be distributed on all cable, ADSL or optic fibre networks. It is available today on the routers of Bouygues Telecom (Bbox), Orange (LiveBox) and Free (Free Box), covering 6.5 million households.





## VOD MARKET

### → VOD - A BOOMING MARKET...

- ✓ VOD is gaining notoriety
  - More than ¾ of households with a broadband Internet connection\* (78%) know about VOD services.
- ✓ The VOD market is growing exponentially
  - 2010: €152 m: **+66%** in value terms vs. 2009 (2009 vs. 2008: +55%).
  - Outlook for 2011: ± €200 m: +30% in value terms vs. 2010.

### → ...WITH HUGE DEVELOPMENT POTENTIAL (2011-2015)

- More than 85% of VOD consumption is on IPTV (9.6 m homes eligible) vs. 21 m homes with a broadband connection\*\*.
- 24% of VOD programmes account for 75% of consumption.
- Growing maturity with the arrival of new distribution media (notably OTT: connected TVs, gaming consoles, tablets, etc.)

and development of new offerings (subscriptions, multiscreen EST).

\* According to BVA, May 2010.

\*\* According to ARCEP, December 2010.

## TF1 VISION - A LEADING MARKET PLAYER

### ① OFFERING

- TOP 10 VOD SALES (GFK) IN 2010: 3 programmes for which the TF1 group is the rights holder.
- TF1 VISION has confirmed its position as the undisputed leader in TV series and entertainment/comedy, with 70% and 90% respectively of VOD sessions in these categories.
  - ✓ Geared to a broad, popular audience - an atypical but advantageous position.
  - ✓ Full cinema catalogue out this year.
  - ✓ TF1 VISION has a broad offering of 6,500 VOD programmes (cinema, series, children's programmes, entertainment, etc.).

### A - Full and exclusive range of TV series (The Mentalist, Dr House, Grey's Anatomy, etc.)

- ✓ Preview VOD: to view episodes that aired the day before in the USA, in English
- ✓ TVOD: to view series again in French
- ✓ Premium to freemium: closer integration of the PVOD offering within the TF1 group via a rebound system.

	<b>V</b> SAISON 2	DISPO TOUS LES MERCREDI
	<b>gossip girl</b> SAISON 4	DISPO TOUS LES MARDIS
	<b>DR. HOUSE</b> SAISON 7	DISPO TOUS LES MARDIS
	<b>ESPRITS CRIMINELS</b> SAISON 6	DISPO TOUS LES JEUDIS
	<b>FRINGE</b> SAISON 3	DISPO TOUS LES LUNDIS
	<b>THE MENTALIST</b> SAISON 3	DISPO TOUS LES VENDREDIS
	<b>GREY'S ANATOMY</b> SAISON 7	DISPO TOUS LES VENDREDIS
	<b>LES EXPERTS: LAS VEGAS</b> SAISON 11	DISPO TOUS LES LUNDIS
	<b>LES EXPERTS: MANHATTAN</b> SAISON 7	DISPO TOUS LES MERCREDIS
	<b>LES EXPERTS: MIAMI</b> SAISON 9	DISPO TOUS LES VENDREDIS

B – The best **stand-up comedians** (Gad Elmaleh, Florence Foresti, Jamel, Thomas Ngijol, Fabrice Eboué, etc.). TF1 VISION has an **exclusive** catalogue of comedy content featuring the hottest artists of the moment.

Florence Foresti's latest show (Mother Fucker) achieved a VOD score comparable to the top blockbusters, with more than 125,000 showings.

End 2011: more exclusive hit shows from Nicolas Canteloup (Canteloup n'arrête jamais) and Jamel Debbouze (Tout sur Jamel).



C – Increased cinema presence, synergies with DVD/BR TF1 VIDEO.

Close partnerships for new content with rights holders for simultaneous Video and VOD releases: toward integration of physical and digital media launches to leverage synergies.

## ② DISTRIBUTION: TF1 VISION - THE MOST ACCESSIBLE SERVICE

- The only VOD offering available from all ISPs: the biggest potential customer base in the market (10 m eligible STBs).
- On the web (TF1vision.fr) and all iTunes screens → broadening of our catalogue with latest and heritage films: e.g. *Elle s'appelait Sarah*, *Mon pote*, *La Vénus noire*
- Launch on 13 May of first TF1 VISION widget for connected TV sets with Samsung.

## PARTNERS

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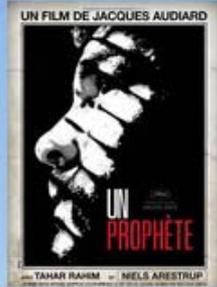


# TF1 VISION present in all homes

SFR NEUF BOX



**Exclusif:** ★  
**TOUS LES SPECTACLES**  
de Gad Elmaleh !



- NOUVEAUTES
- CLUB **HD VOD**
- TOP DES VENTES
- RATTRAPAGE TV
- CINEMA
- SERIES TV
- DIVERTISSEMENTS
- JEUNESSE
- DOCUMENTAIRES
- ADULTE **18**

# ITUNES



**Films français**

**Nouveautés**

Titre	Genre	Date de sortie	Prix
Le vilain	Comédie	Sortie 25 nov. 2009	13,99 € ACHETER
Trésor	Comédie	Sortie 11 nov. 2009	3,99 € LOUER
Kerity, la maison des...	Famille	Sortie 09 déc. 2009	13,99 € ACHETER
Les herbes folles	Comédie	Sortie 20 mai 2009	3,99 € LOUER
Cinéma	Comédie	Sortie 28 oct. 2009	3,99 € LOUER
L'affaire Farewell	Suspense	Sortie 23 sept. 2009	13,99 € ACHETER
Divorces	Comédie	Sortie 14 oct. 2009	13,99 € ACHETER
Safari (2009)	Comédie	Sortie 01 avr. 2009	9,99 € ACHETER
LOL (Laughing Out L...	Comédie	Sortie 04 févr. 2009	3,99 € ACHETER
Coco (2009)	Comédie	Sortie 18 mars 2009	9,99 € ACHETER

TF1 VISION
UNE QUALITÉ D'IMAGE EXCEPTIONNELLE

E-MAIL  MOT DE PASSE

6567 vidéos disponibles

**NOUVEAUTÉS**

ACCUEIL

**NOUVEAUTÉS**

EXCLUSIVITÉS

BONS PLANS 1.99 €

COUPS DE CŒUR

DERNIERS JOURS

DE A A Z

SÉRIES EN DIRECT DES USA

CINÉMA

TELEVISION

SPECTACLE / HUMOUR

JEUNESSE

MANGA

DOCUMENTAIRE

MUSIQUE

ADULTE

**NEWSLETTER**

INSCRIVEZ-VOUS POUR ÊTRE INFORMÉ DES NOUVEAUTÉS ET PROMOTIONS

**NOUVEAUTÉS**

Page : 1 2 3 - Page suivante >

42 titres - Recherche :

**A l'origine**

Film - 2008 - Drame / Passion - 130min.  
**Avec :** François Cluzet, Emmanuelle Devos, Gérard Depardieu  
**A partir de:** 3.99 €

Note internaute **08/10**

**Une Affaire d'Etat**

Film - 2009 - Policier / Thriller - 110min.  
**Avec :** André Dussollier, Thierry Frémont, Rachida Brakni  
**A partir de:** 4.99 €

Note internaute **08/10**

**MEILLEURES VENTES**

1. Goemon the freedom fighter **8/10**
2. Dark World **8/10**
3. RTT **8/10**
4. L'homme de chevet **8/10**
5. Love happens **8/10**

LA DÉMO VIDEO  
LA QUALITÉ EN PLEIN ÉCRAN

TF1 VISION SUR VOTRE TV  
CONNECTEZ-VOUS

VISUAL OF THE TF1 VISION APPLICATION on SAMSUNG connected TV sets

TF1 VISION
Mon compte - Infos

Cinéma Séries TV Jeunesse Humour Adulte

**Nouveautés**

**Top des ventes**

**Vu sur TF1**

◀ Déplacement ⏪ Accéder ↻ Retour ⏩ Quitter





The leading French television channel and the French leader in consumer electronics signed a three-year strategic partnership on 9 December 2009 to bring TV viewers an all-new entertainment experience.

Using Samsung technology and TF1's editorial expertise, web-connected TV sets have since March 2010 featured original interactive services related to the brands and leading content of TF1, including apps for news, sport and up-to-the-minute programme news.

As pioneers in high-definition television, TF1 and Samsung are forging ahead with efforts to enhance viewers' pleasure by enabling them to extend their TV watching experience smoothly through interactive apps.

### NEW TF1 VISION WIDGET

Following the "TV programmes", "weather", "TF1 News", "Eurosport" and "Events" apps, TF1 has developed the "TF1 Vision" app providing direct advance access to the latest seasons of the top US series and the biggest box-office successes.

The new widget brings users of Samsung connected TVs the possibility to rent for 48 hours and exclusively all the latest seasons of the leading US series the day after they air in the USA, together with a selection of new and catalogue films.



## CONCLUSION



### A UNIQUE MULTI-SCREEN STRATEGY

TF1 brings its public a unique and coherent product range on all screens – web, IPTV, mobile screens and mobiles – through a harmonious offer, graphic style and ergonomics.