

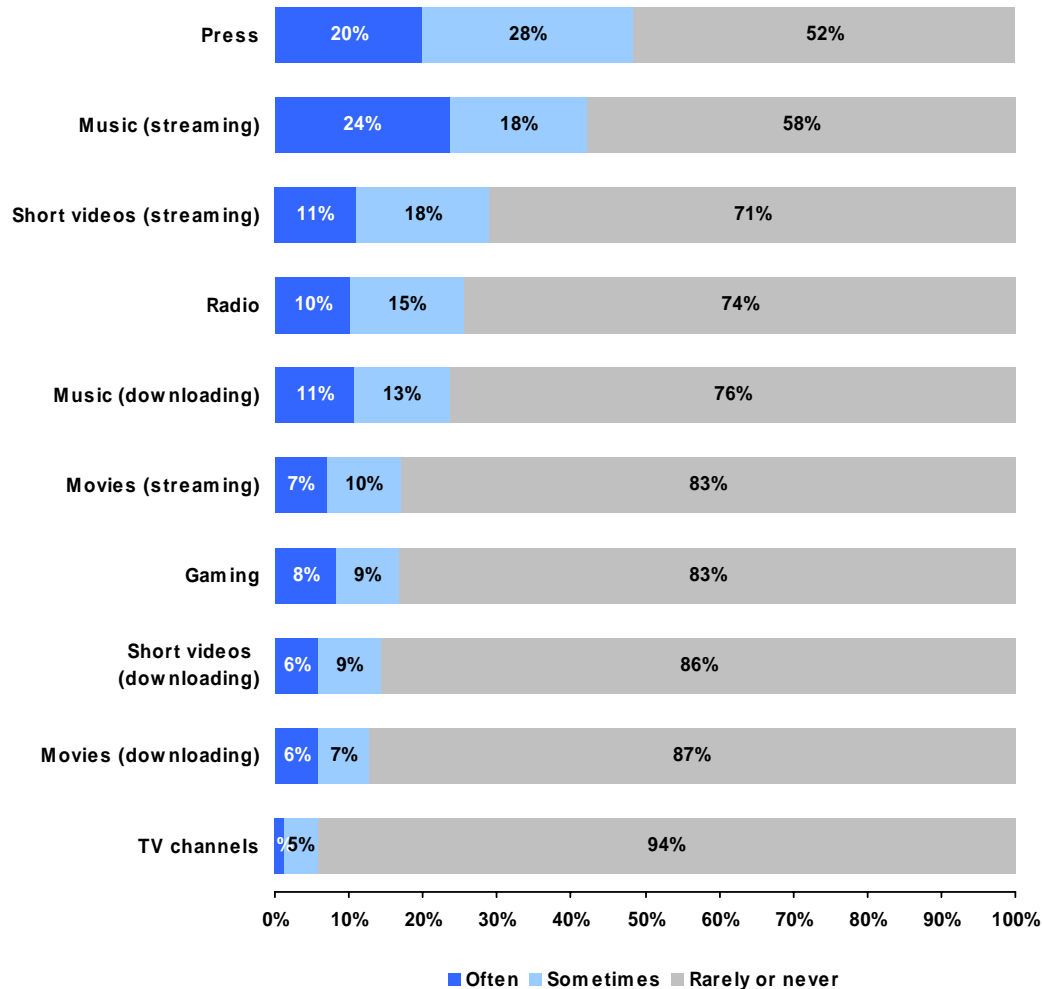
19 & 20 November 2008 - Le Corum - Montpellier

Media Seminar – Will Content drive the Internet?



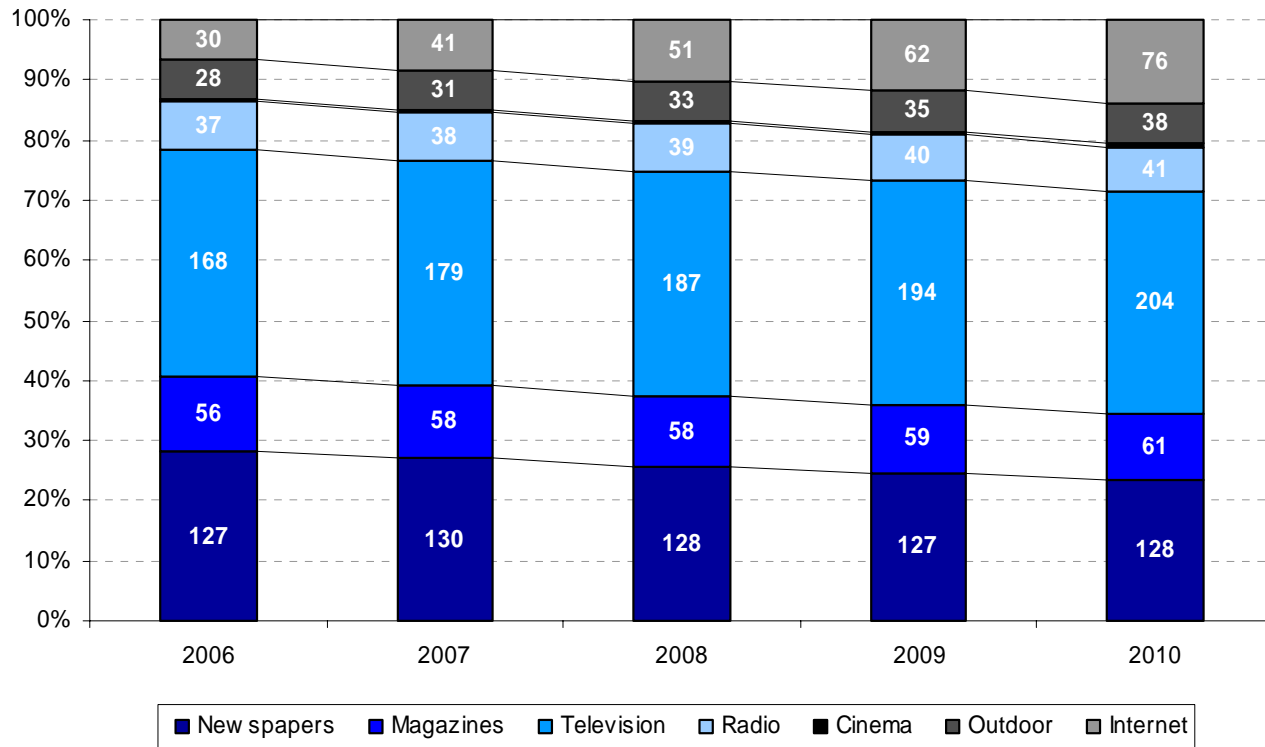
Introduction : Does the Internet spell the future of traditional media?

Online entertainment progresses gradually



Source : IDATE, Use-IT 2007 survey

Press, television and radio are all losing share to the Internet in terms of ad expenditure



Source : Zenith Optimedia, October 2008

User-Generated Content: will the threat come from amateur content?

Video sharing sites

YouTube: 13 hours of video are posted every minute! / 300 million UV worldwide

DailyMotion: 15,000 new videos uploaded daily / 50 million UV

Photo sharing sites

Photobucket: 5 billion images and videos stored / 10 million new images are uploaded daily / 40 million unique users

Flickr: 2 billion photos stored / 3 to 5 million new photos are uploaded daily / 42 million UV

Social networking sites

Facebook: More than 60 million active users / An average of 250,000 new registrations per day since Jan. 2007 / Active users doubling every 6 months / No. 1 photo sharing application on the Web, Photo application draws more than twice as much traffic as the next three sites combined / More than 14 million photos uploaded daily

MySpace: More than 110 million monthly active users / An average of 300,000 new registrations per day / 1.5 Billion images stored / 8 Million images being uploaded per day / 60,000 new videos being upload to MySpaceTV each day / More than 8 million artists and bands on MySpace Music Acts

Citizen Journalism

AgoraVox: French version: 34,000 authors / 1,000 stories uploaded daily (30 selected daily) / between 700,000 and 1 million UV/month

Wikis

Wikipedia: over 10 million articles in 253 languages / the English edition has 22% of all articles on Wikipedia, the German edition 8%, the French edition 7%, the Polish edition 5% / 683 million visitors per year

Blogs

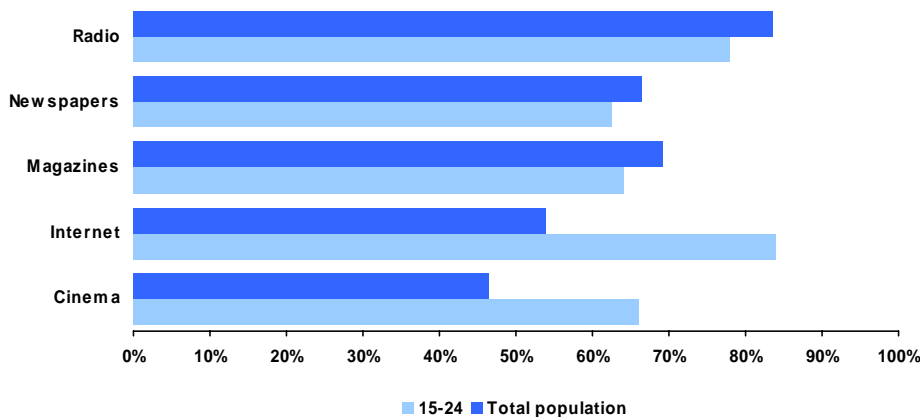
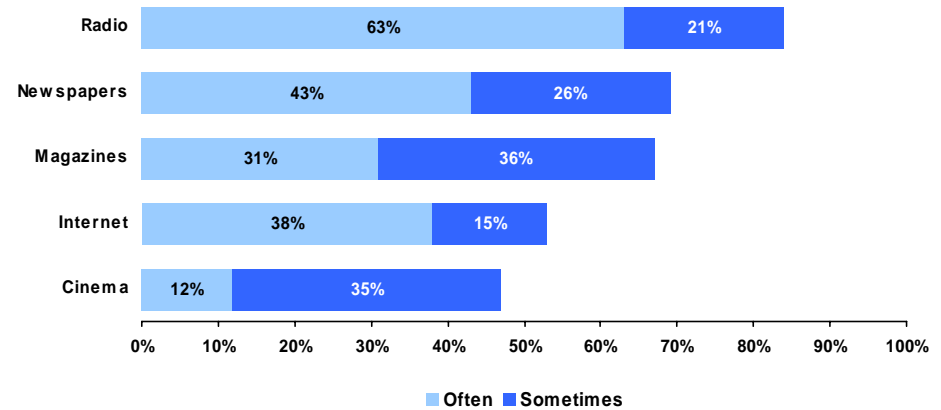
More than 112 million blogs / daily increase of 70,000

Virtual worlds

Second Life: Tens of billions of user-created objects / more than 14.5 million user accounts

Traditional media audience still above Internet audience

- On average, TV, radio and press still gather a greater audience than the Internet ...

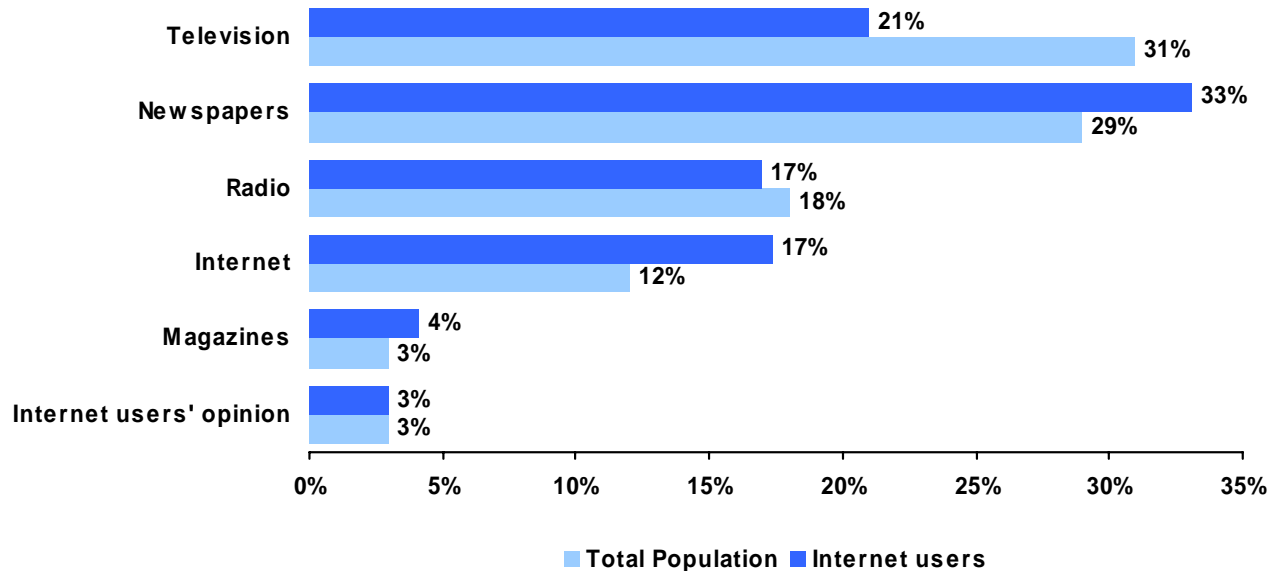


- ...except among the 15-24.
- A prefiguration of future uses?

Source : IDATE, Use-IT 2007 survey

TV and newspapers still more credible than the Internet...

- ...but radio is already loosing ground...
- ...and magazines are clearly outstripped

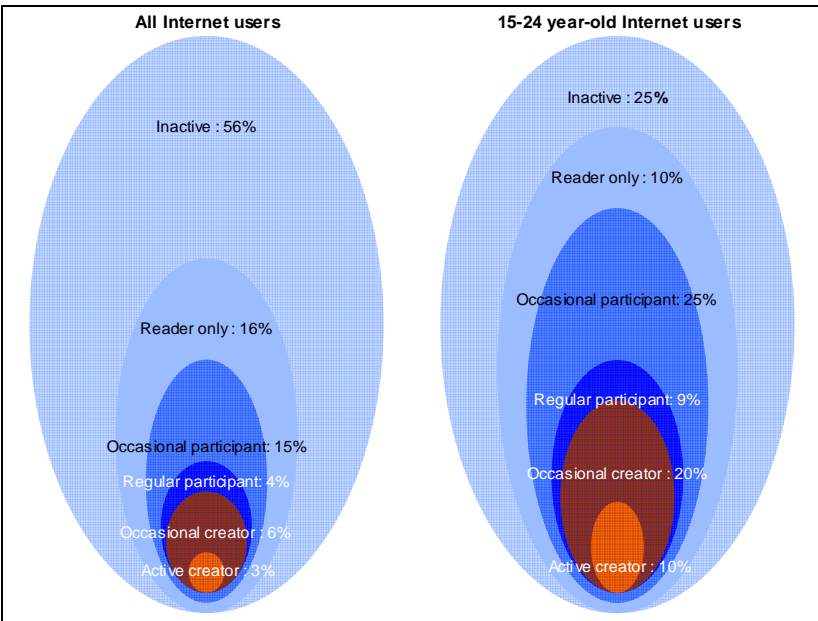


Source : IDATE, Use-IT 2007 survey

The importance of UGC should not be overestimated

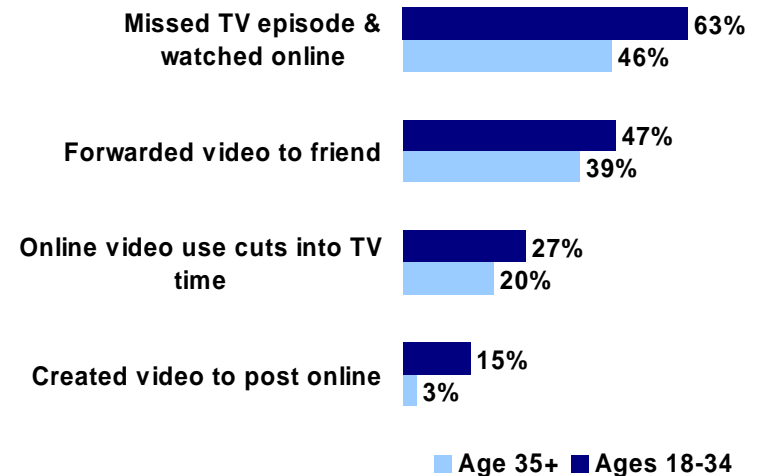
- Most social network members don't create content.

The social technographics profile of French Internet users



Source: IDATE, Use-IT 2007 survey

The way people use online video - US data



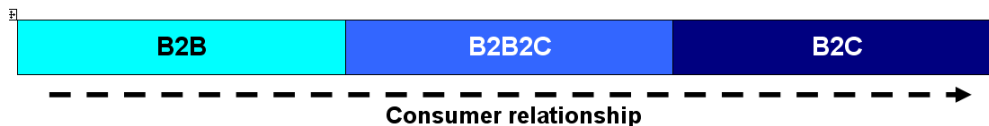
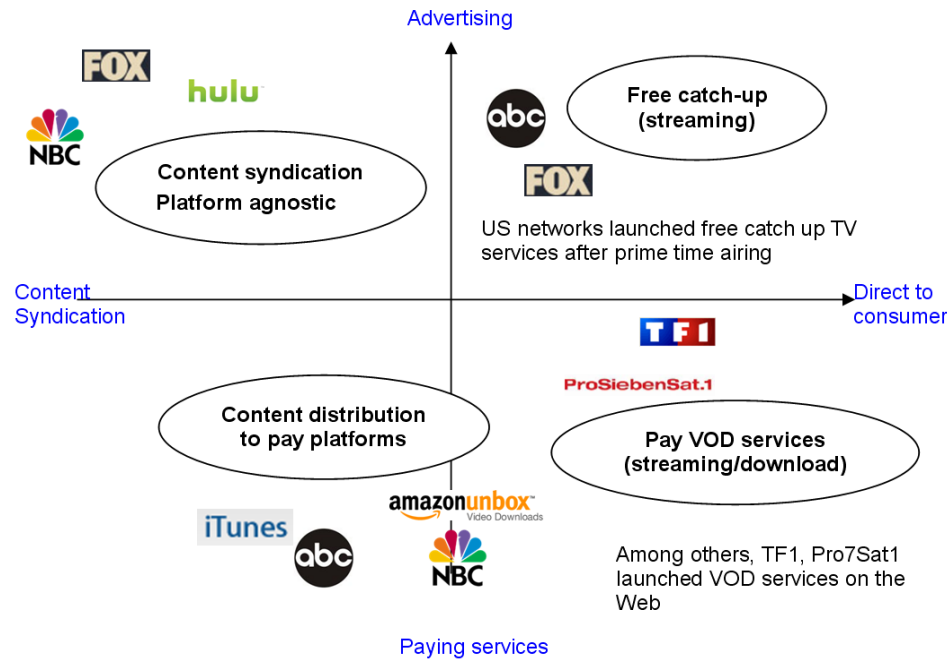
Source: Optigence Research Report Bi-Annual Online Video Study, 2007

- As regards video, TV programs still remain the most attractive online content.
- The strength of traditional media lies in their brands which can be made available under any form on any platform.

In the Internet era,
adaptability has become the buzzword

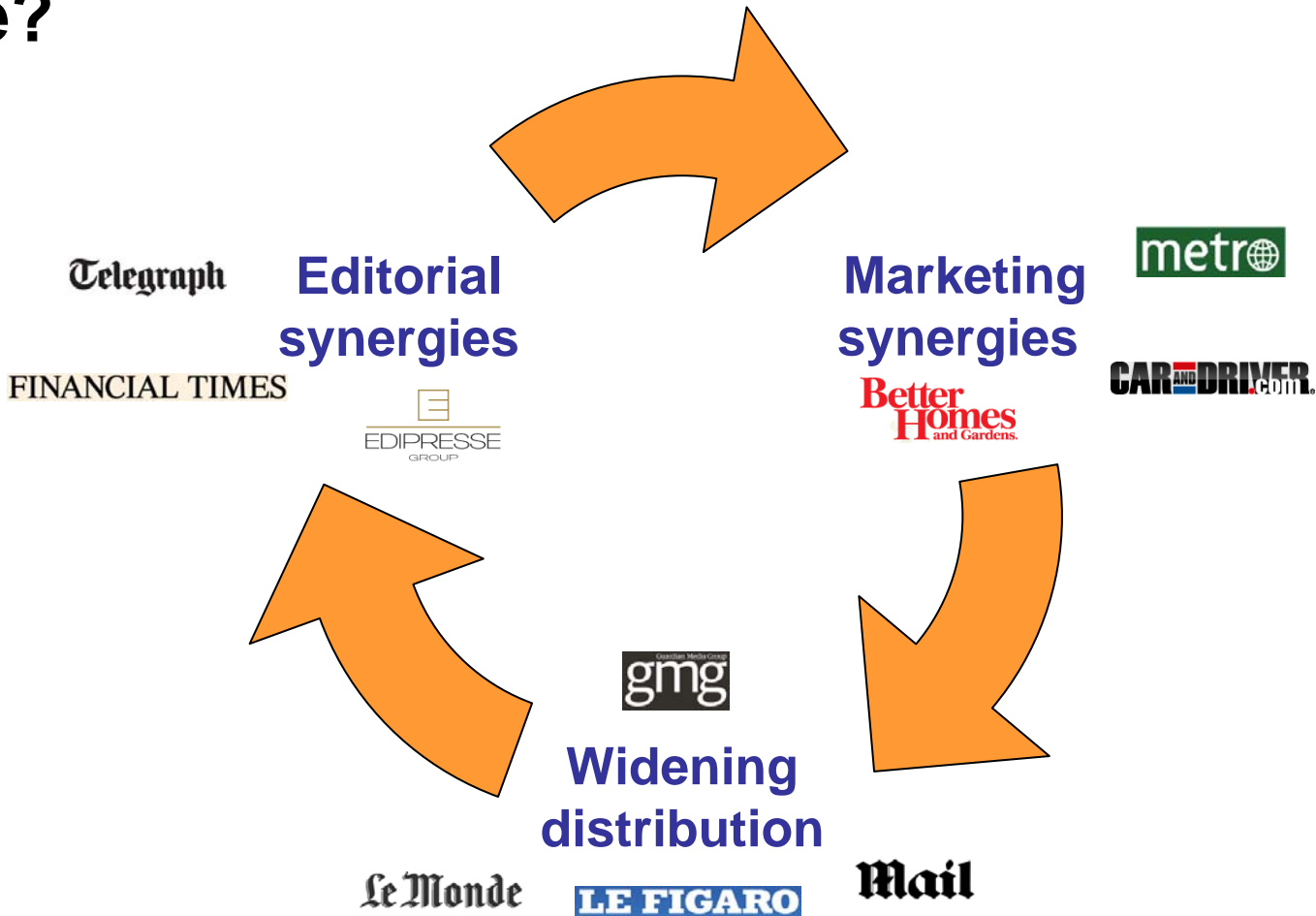
TV: New business models to strengthen ties with viewers

TV channels' internet business models (illustrations)

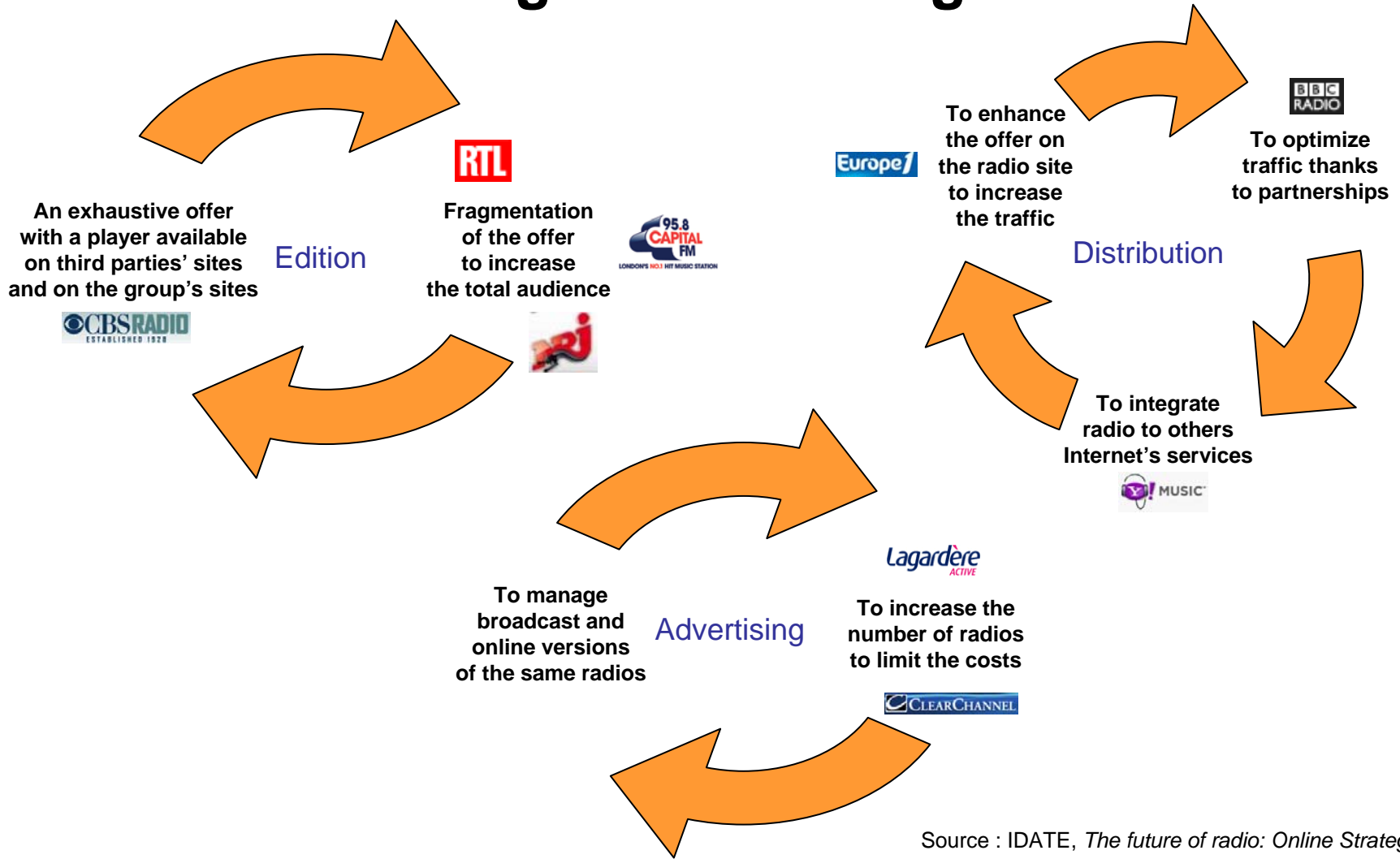


Source : IDATE, TV channels' internet strategies, 2007 edition

Press: Toward a virtuous Internet-print press circle?



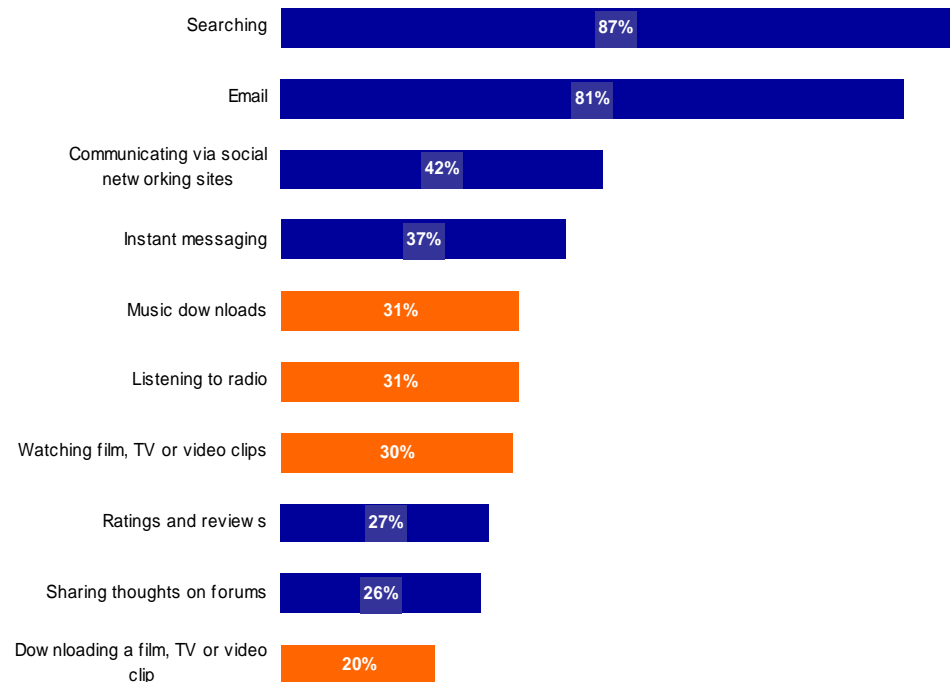
Radio: Combining online strategies



Content and the Internet: a chicken or the egg conundrum?

- Content holds a growing place in the Web 2.0 environment
- Traditional media players are forced to develop an online strategies
- The future of content and of the Internet are closely tied together
- But, who needs who the most?

Top ten online activities
Monthly usage of Social Computing applications in 2007



Source: EIAA Mediascope Europe 2007

Key questions

- Information at the heart of the Internet:
 - What interactions between online and print information?
- Amateur vs pro content:
 - Competition or complement?
- Legal and policy issues:
 - Does the current legislation need to adapt?
- How to monetize content on the Internet?
 - Can advertising pay for everything or will users accept to pay?
- Technical issues and challenges:
 - Mobility, time-shifting, etc.: what changes on the technical chain?