



Racing's Lifeblood – The Future Landscape for Wagering

Speaker:

David Attenborough

Managing Director and Chief Executive Officer, Tabcorp

Plenary Session 1

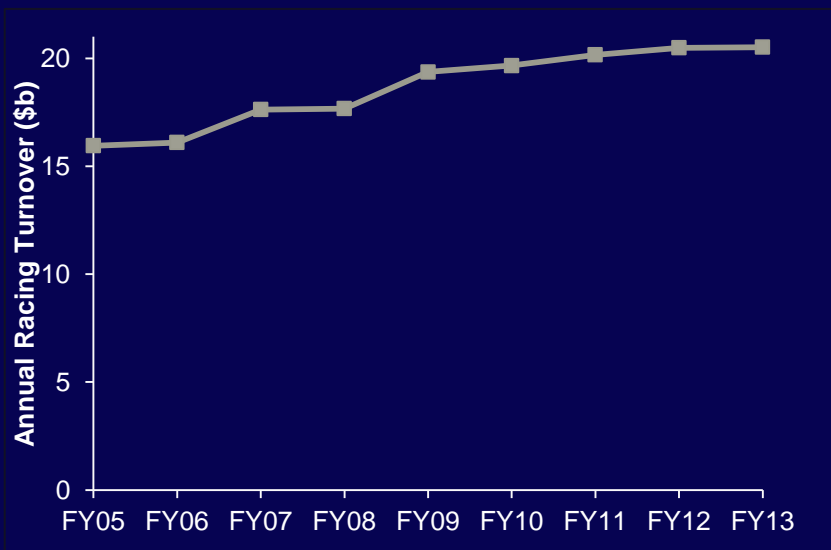
RACING'S LIFEBLOOD – THE FUTURE LANDSCAPE FOR WAGERING

**Address By David Attenborough
Managing Director And Chief Executive Officer,
Tabcorp Holdings Limited**

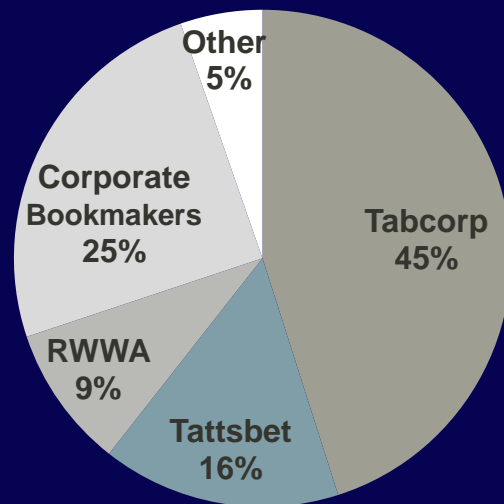


Overview of the Australian Wagering Market

Australian Racing Wagering Turnover



FY13 Share - Australian Racing Wagering Turnover

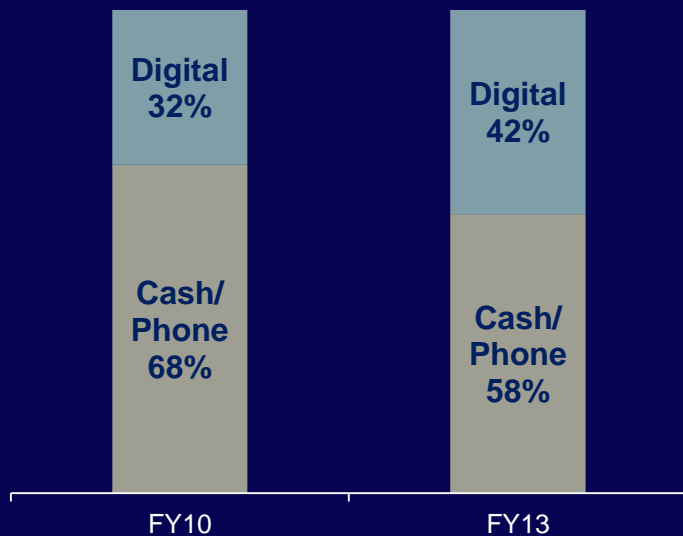


Other includes ACTTAB and bookmakers licensed outside of NT. Excludes Betfair

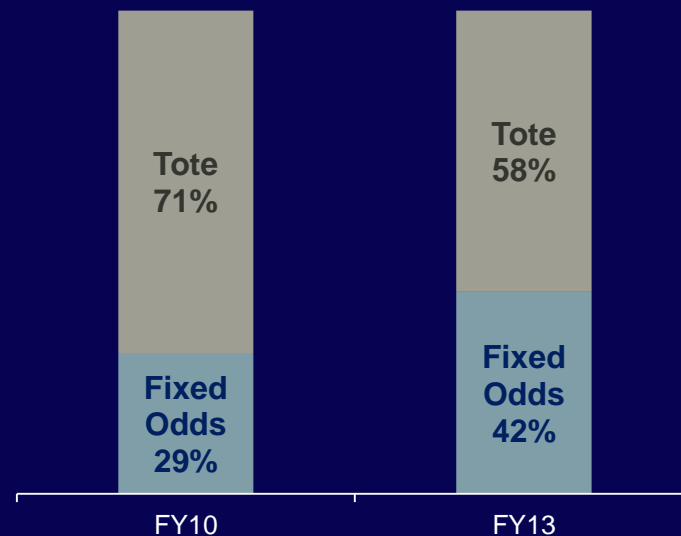


Recent Trends in Australian Wagering

Digital Wagering Share of Total Racing Market



Fixed Odds Wagering Share of Total Racing Market





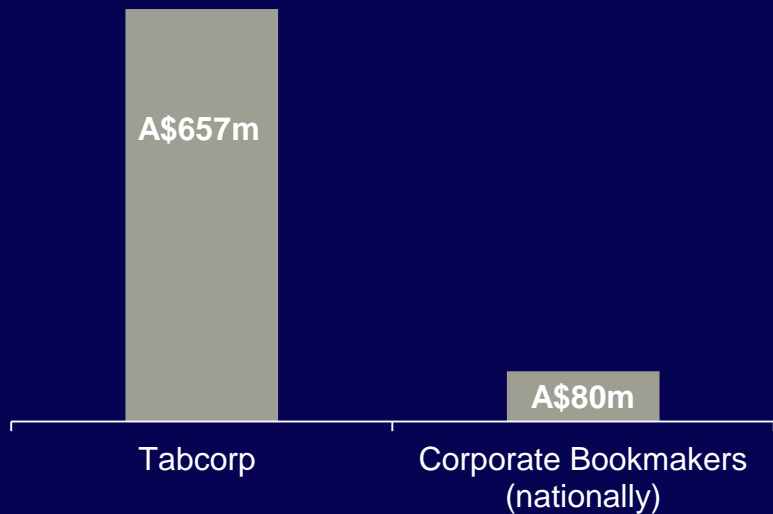
The Competitive Environment

- UK/Irish owned bookmakers have increased their presence in Australia
 - William Hill, Paddy Power, Ladbrokes, Bet365 have entered market
- A 2012 Court judgment prohibited Sportsbet (owned by Paddy Power) from operating branded, self-service Internet betting kiosks in the Victorian retail environment
- Offering tote odds products has driven corporate bookmaker growth
 - Facilitated by lower payments to racing and taxes



The Uneven Playing Field

FY13 Returns to Racing Industry



FY13 State/Territory Taxes Paid



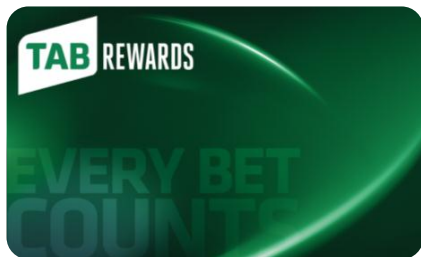


Tabcorp's Competitive Position

- A deep customer base, trusted brands and multi-channel, multi-product network

CUSTOMER

- Customer Relationship Management
- Analytics
- TAB Rewards Loyalty



CHANNEL

- Digital leadership, underpinned by exclusive retail network
- Channels work together for overall growth



PRODUCT

- Expanded fixed odds
- Expanded international wagering





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HONG KONG 2014

Thank you



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Moderator:

Barrie Cassidy

Panelists:

**Winfried Engelbrecht-Bresges, Jennifer Owen, Breon Corcoran,
Paul Bittar, Philippe Germond & David Attenborough**



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