

# Racing's Lifeblood – The Future Landscape for Wagering

Speaker:

**David Attenborough**

*Managing Director and Chief Executive Officer, Tabcorp*

## Plenary Session 1

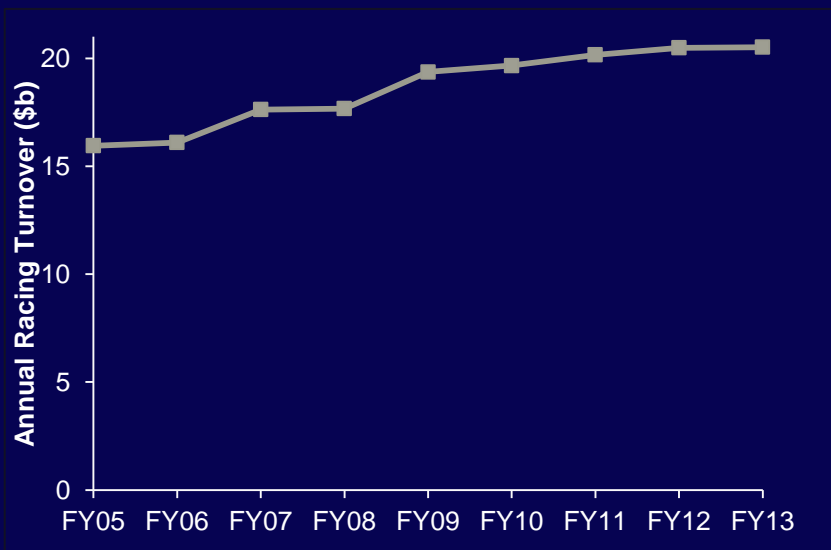
# **RACING'S LIFEBLOOD – THE FUTURE LANDSCAPE FOR WAGERING**

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

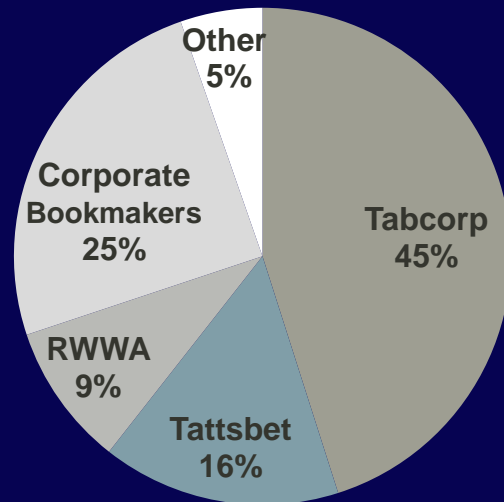


# Overview of the Australian Wagering Market

## Australian Racing Wagering Turnover



## FY13 Share - Australian Racing Wagering Turnover

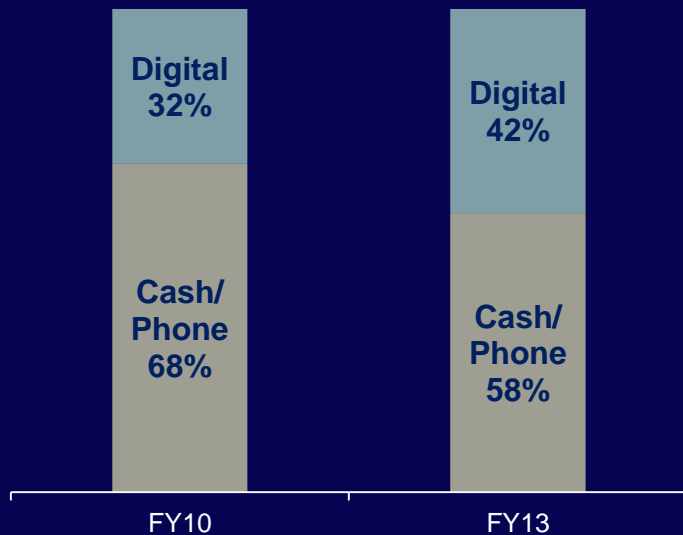


Other includes ACTTAB and bookmakers licensed outside of NT. Excludes Betfair

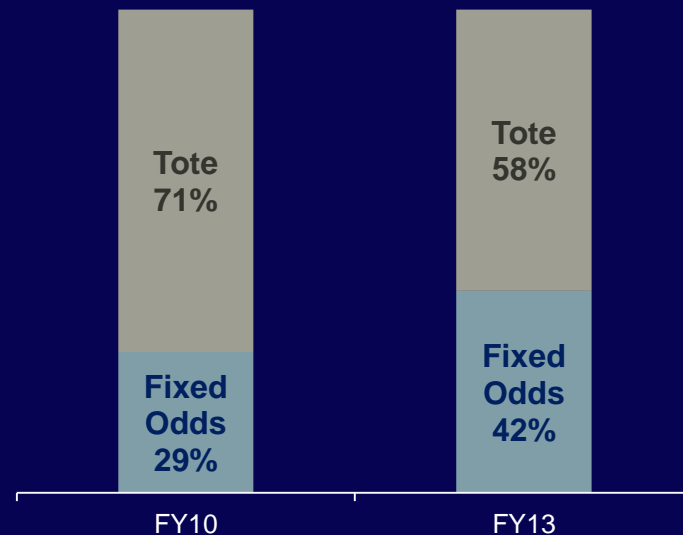


# Recent Trends in Australian Wagering

## Digital Wagering Share of Total Racing Market



## Fixed Odds Wagering Share of Total Racing Market





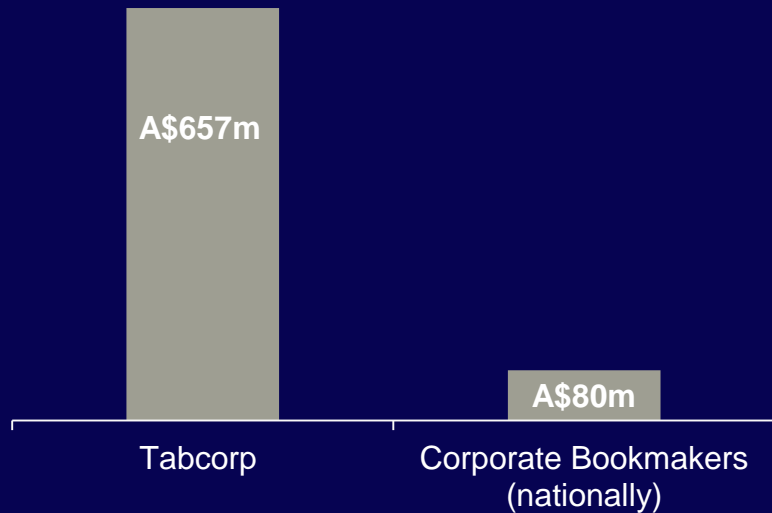
# The Competitive Environment

- 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

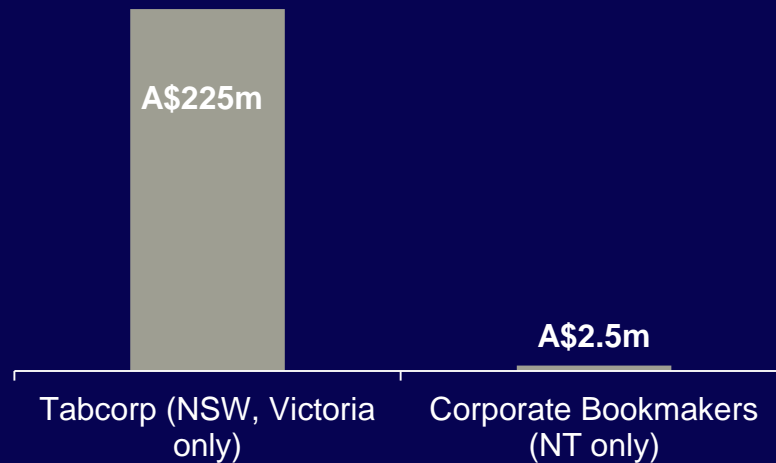


# The Uneven Playing Field

## FY13 Returns to Racing Industry



## FY13 State/Territory Taxes Paid



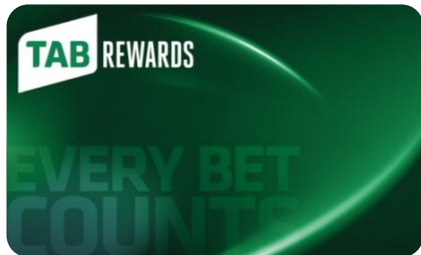


# Tabcorp's Competitive Position

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

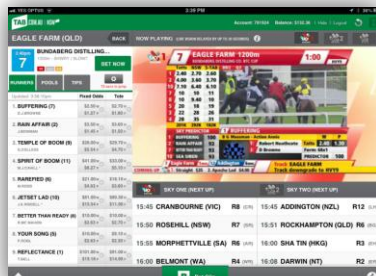
## CUSTOMER

- 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



# Thank you





# Racing's Lifeblood – The Future Landscape for Wagering

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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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