



“Australia’s market-leading Wagering Operator across all channels”

Tucson, December 2014



Tabcorp: FY14 Results

- Wagering Handle: US\$10.8 billion
- Revenue: US\$1,835.8 million +1.8%
- Profit: US\$ 437.5 million +4.8%
- JV with Racing returned US\$ 661.5 million to the Racing Industry
- Fixed Odds is fastest growing betting product
- Significant growth in 'digital channels'

“The Group’s performance highlights the benefits of our diversification across four businesses, with market-leading brands and a unique multi-product, multi-channel distribution model.”

*Paula J Dwyer
Chairman*

Tabcorp: Brand Overview

Product	Brands	Licence expiry	% EBITDA	Retail distribution
Wagering		NSW 2097 Victoria 2024	57%	NSW 2,130 outlets Victoria 750 outlets 260 with oncourse wagering facilities
		NSW 2097 Victoria 2024		NSW 2,100 outlets Victoria 750 outlets
		NT 2015		
Keno		NSW 2022 Queensland 2047 Victoria 2022	16%	Queensland 1,170 outlets NSW 1,800 outlets Victoria 680 outlets
TGS		n/a	13%	8,440 EGMs contracted 166 outlets
Media		n/a	14%	5,400 retail outlets Broadcasting from 200 Australian racetracks

Racing Menu

Next Race to Jump

Horse Racing

Harness Racing

Greyhound Racing

Feature Racing

TV Games

Aus Open

Live Betting

Quick Multi

Basketball

American Football

Soccer Matches

More (41) +



Chicago Blackhawks at Colorado Avalan...

Colorado has won their last four games but the Rockies have failed to beat the Avalanche in their past three encounters.

Match Result 16 More Bets

Chicago Blackhawks	1.84
Colorado Avalanche	3.40
Draw	4.10

GREYHOUND RACING
Daily Specials

NHL
Blackhawks at Avalanche

UEFA EUROPA LEAGUE
Wolfsburg v Everton

UEFA EUROPA LEAGUE
Tottenham v Partizan

QUICK BET OFF Info

Bet Slip (0) Pending (5) Info

Your betting slip is empty.



MIRACLE MILE
LUXBEST
ON ALL RACES

Bet Now

Racing Next To Jump

ALL

LIST



SALE (VIC) R3 9 Min			BALMORAL PARK (USA) R3 12 Min			TE AWAMUTU (NZL) R6 16 Min		
No.	Runner (Box)	LuxMid Win	No.	Runner (Handicap)	LuxMid Win	No.	Horse (Barrier)	STAB +5% Win
6	TINDER KING	4.00	4	LYNRAE JAZMIN	3.00	12	MISS FOXWOOD (5)	2.05
10	BABY BLITZEN	4.60	1	PRINCESS JOVEN...	5.70	5	RICH BILLIE M... (1)	8.46
1	DUNDEE ROSE	5.80	5	YOUROLDLOV-EL...	6.40	2	KEEPHER CLOSE (2)	8.56
3	RAGTIME JAYMEE	7.00	8	DAWNS DELIGHT	6.50	6	MIHAIA (6)	9.09
2	LINDENOW BOMBER	7.90	7	BE MY ESCAPE	8.40	7	RODDICK (4)	12.45
7	BORIS FLAMES	9.50	9	SOFT VELVET	11.40	9	COOLIBAH (8)	12.97
5	MUZZLE JUMP	9.60	6	BUBBALA	15.50	1	THE SHACKLER (3)	13.92
8	LORD DIAMOND	10.80	3	MSRICHSTYLE	38.00	8	TORRICELLA (7)	17.59
4	SODA LADY	4.88	2	SAMMIS SONG	42.70	10	OCEAN BOUND (9)	23.89

[More Bet Options](#)

[More Bet Options](#)

[More Bet Options](#)

WEEKLY SPECIALS

GREAT SPECIALS EVERY DAY ON
RACING AND SPORTS

[*See details](#)

LUXDIV



Available on every Australian horse race every day

8/11/14 Flemington Race 5 - Le Roi

\$6.50	\$5.70	\$5.80	\$5.70
SP	NSW	Tatts	VIC

[See more](#)

Sports Betting - Next To Go

GOLF Closed		SOCCER MATCHES 14 Min		BASKETBALL 14 Min	
AUS OPEN R1 3-BALLS 3-Ball Winner 0 MORE BETS		COSTA RICAN PRIMERA DI... Match Result 33 MORE BETS		NCAAB MATCHES Head to Head 3 MORE BETS	
Smitic, Cameron	1.77	Deportivo Saprissa	1.56	Auburn Tigers	1.69
Fowler, Peter	3.65	Draw	3.75	Oregon State Beavers	2.17

PLAY NOW TO GET 100% BONUS UP TO \$500

JOIN NOW
IT ONLY TAKES 1 MINUTE!

START PLAYING GAMES NOW! **IT'S FREE TO JOIN, SIGN UP NOW!**



ACES AND EIGHTS
PLAY NOW!



AVALON
PLAY NOW!



BILLION DOLLAR GRAN
PLAY NOW!



BURNING DESIRE
PLAY NOW!



CASHAPILLAR
PLAY NOW!



CASHSPASH 3 REEL
PLAY NOW!



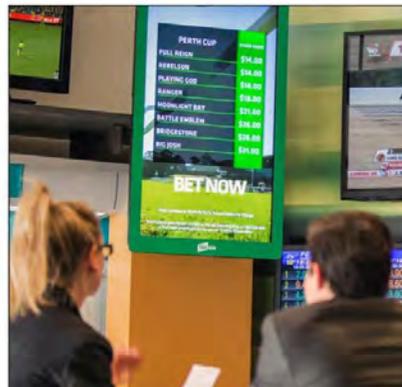
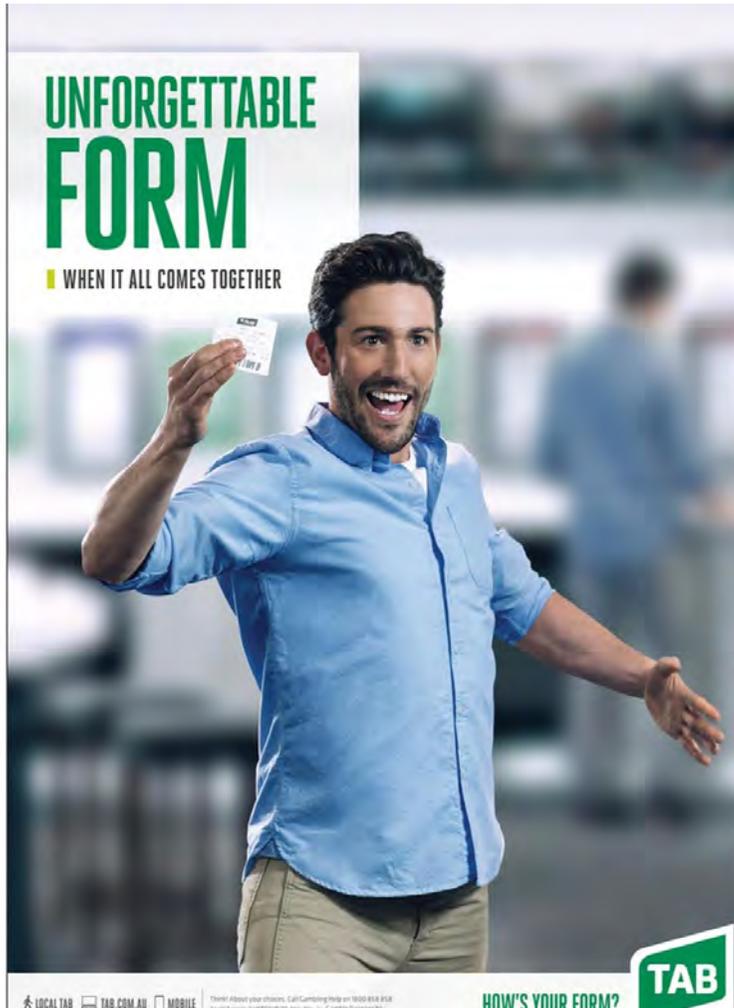
HELLBOY
PLAY NOW!



IMMORTAL ROMANCE
PLAY NOW!

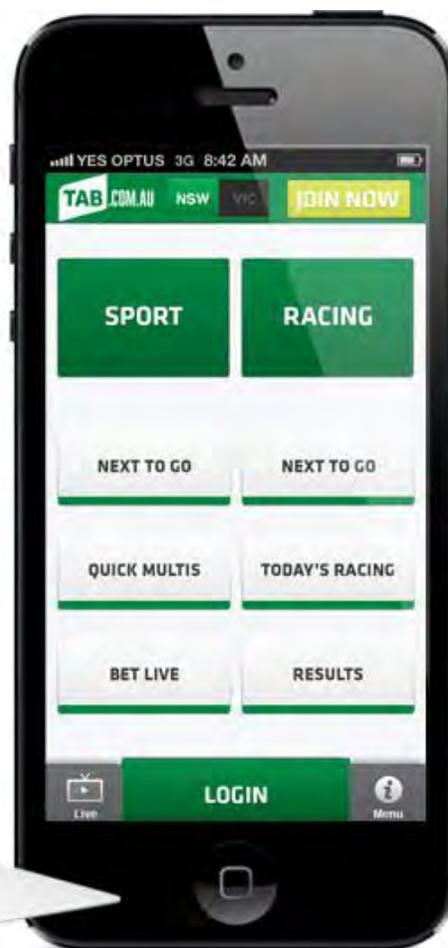


Multi-Channel Strategy built around 'The Customer'



Engaging with 'The Customer'

32% of Handle via Digital Channels



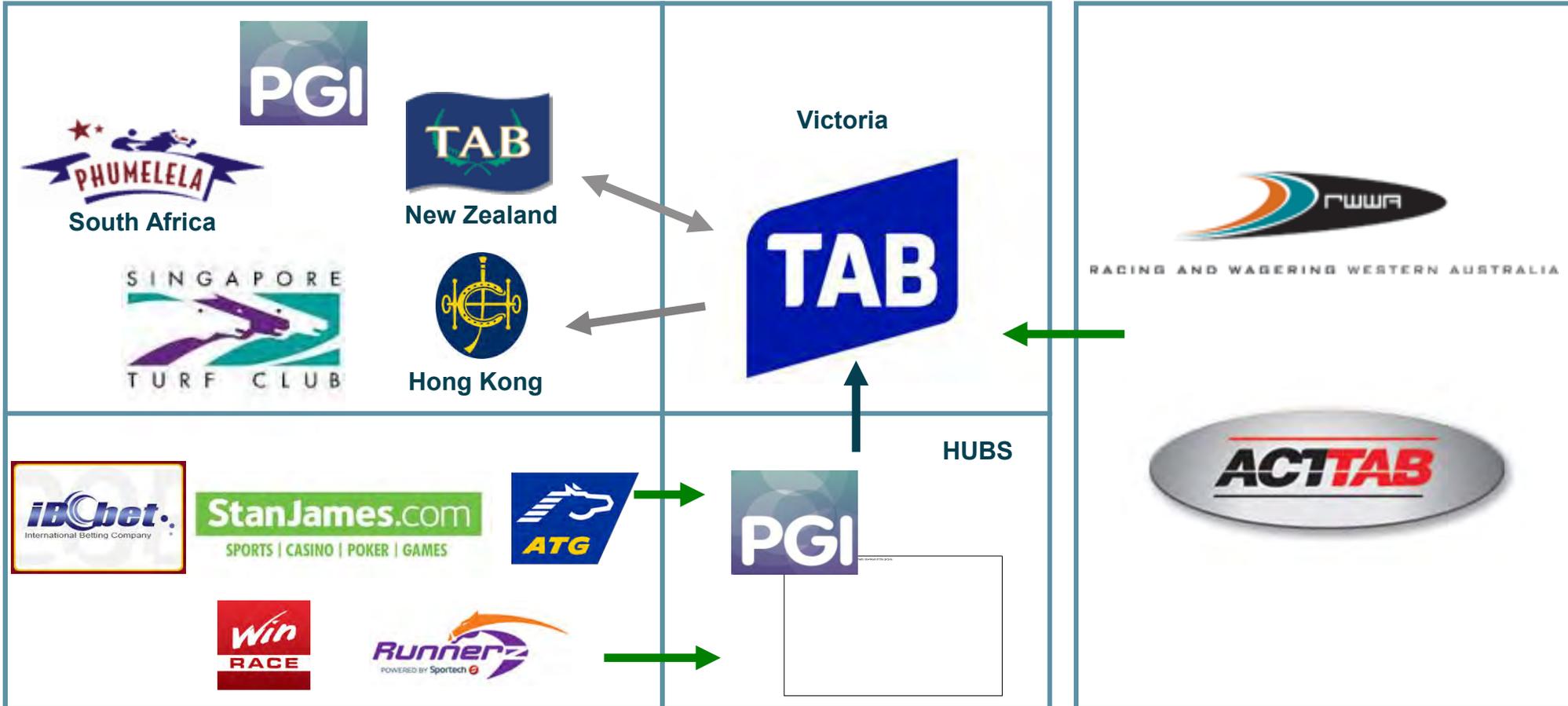


SuperTAB (Vic) Co-mingling Overview

International Partners

SuperTAB pool

SuperTAB Domestic partners

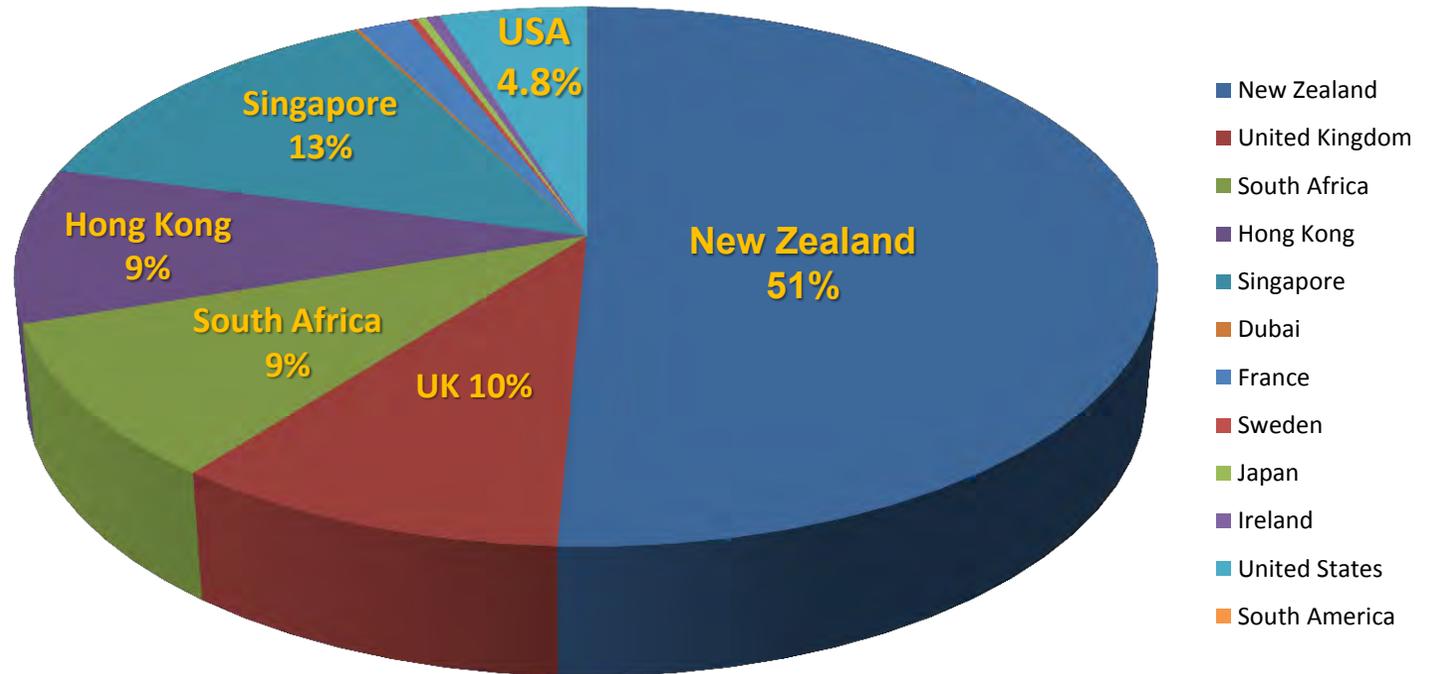


Arrows represent the direction / flow of pooling funds

AUSTRALIA: Live Racing Import

Jurisdiction		Races Covered (FY14)
	New Zealand	10,398
	United Kingdom	6,614
	South Africa	3,525
	Hong Kong	798
	Singapore	1,010
	Dubai	71
	France	1,625
	Sweden	339
	Japan	262
	Ireland	562
	United States	3,267
	South America	13

FY14 Import Handle share by country



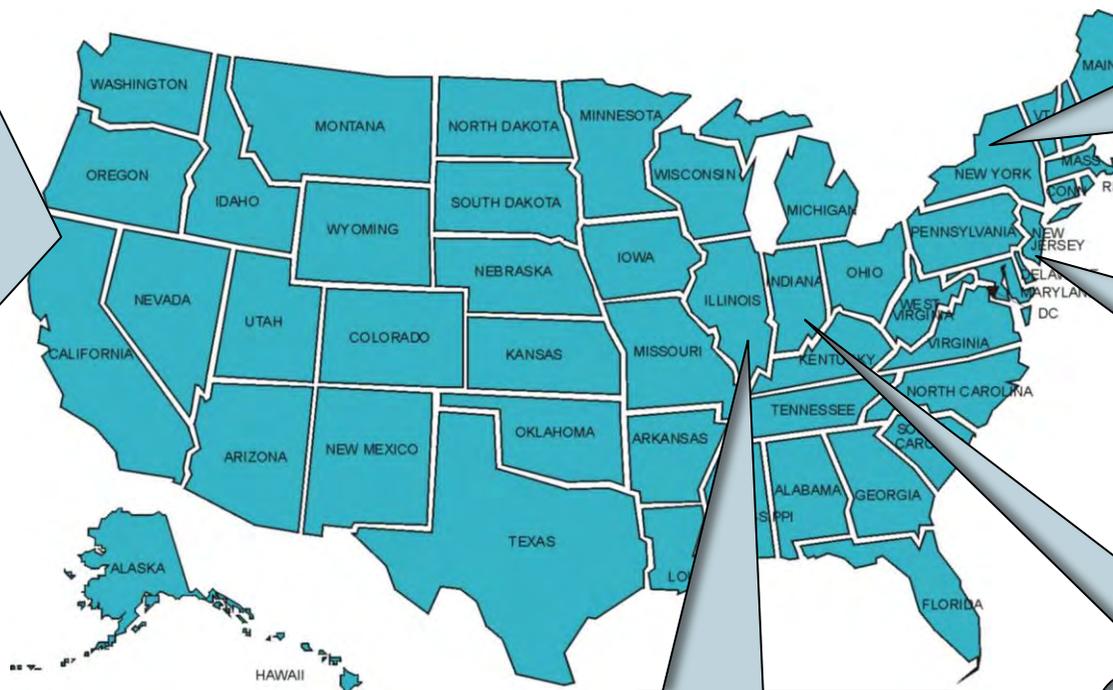
- Total import Handle FY14 US\$ 656.9 million
- Total races imported FY14 = 28,484

LIVE RACING IMPORT – UNITED STATES

USA Import Days: Saturday – Thursday (Sunday - Friday in Australia)

Thoroughbreds

- Monday, Tuesday, Thursday & Saturday meetings.
- Broadcast from 8am – 11am in Australian time zone.
- ✓ Santa Anita
- ✓ Golden Gate
- ✓ Del Mar
- ✓ Turf Paradise
- ✓ Portland Meadows
- ✓ Los Alamitos
- ✓ Sonoma County
- ✓ Fresno
- ✓ Pleasanton
- ✓ Sacramento
- ✓ Ferndale
- ✓ Stockton



Yonkers

- Monday, Tuesday, Thursday & Saturday night meetings.
- Broadcast from 10am – 1pm in Australian time zone

The Meadowlands

- Thursday & Saturday night meetings.
- Broadcast from 10am – 1pm in Australian time zone

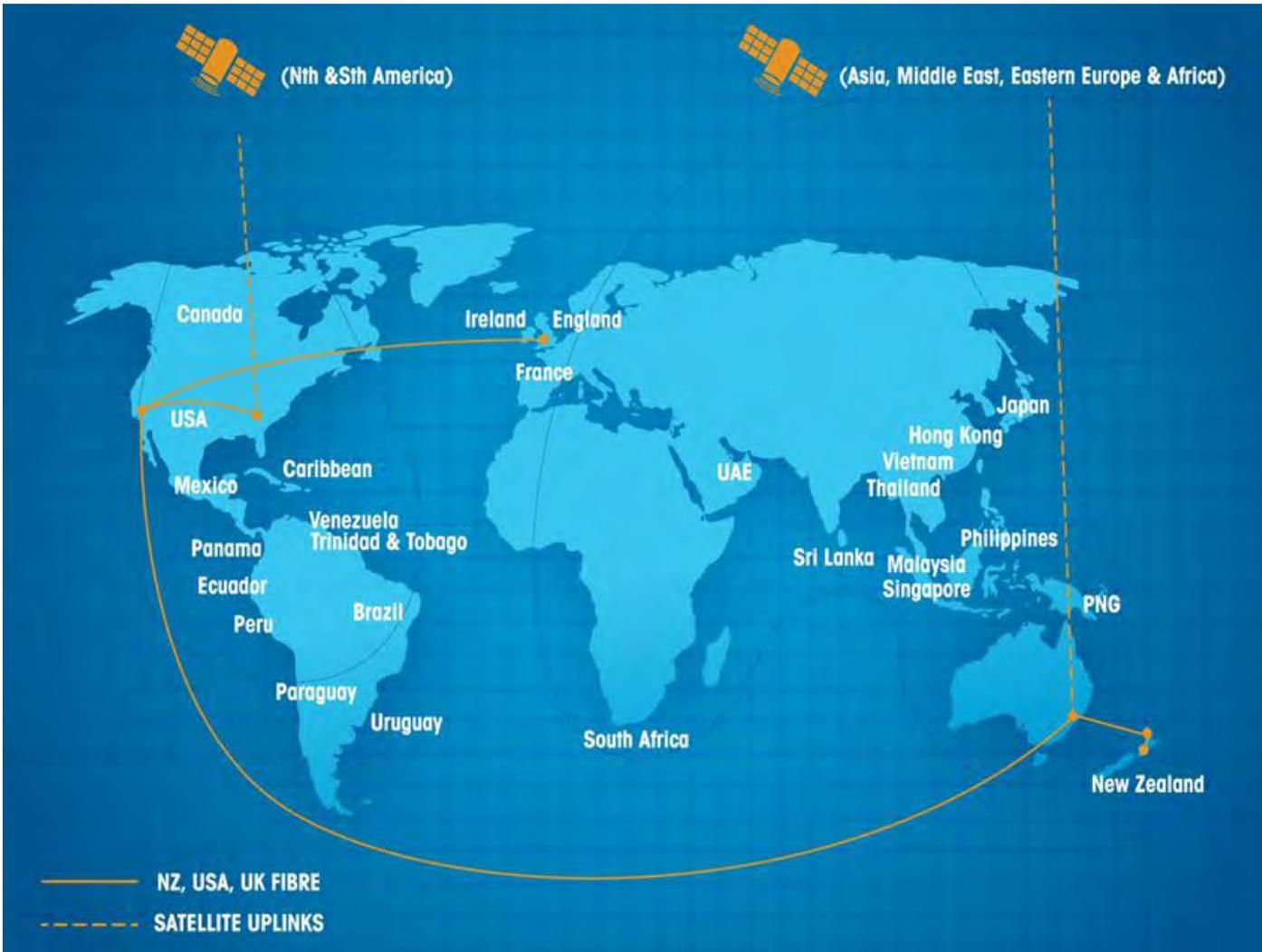
Balmoral Park

- Sunday & Wednesday night meetings.
- Broadcast from 10am – 1pm in Australian time zone

Hoosier Park

- Wednesday, Thursday & Saturday night meetings.
- Broadcast from 8am – 1pm in Australian time zone

AUSTRALIAN & NEW ZEALAND EXPORT



Sky International exports Australian and New Zealand racing to over 50 countries. Producing 7 different feeds daily.



Sky 1 & Sky 2 are the core wagering channels distributed to the extensive retail network (OTB). Also available on pay television. Re distributed as a duel player stream for international ADW's.



Sky Racing World is a premium thoroughbred only channel distributed to pay television. This channel is also re branded "**Racing World Australia**" for the UK & Middle East markets

Sky Racing World

- Wholly owned subsidiary of Tabcorp based in KY, USA
- Provides live broadcast, video stream, programs & race data for all Australia & NZ racing
- North American handle on Australia racing US\$ 200 million
- Australia & NZ Exports to the Americas:
 - 7,200 + Australian thoroughbred races per year
 - 7 x days/week
 - 1,800 + NZ thoroughbred races per year
 - 4/5 x days/week
- Future plans:
 - Additional thoroughbred races, Harness & Greyhounds



Sky Racing World



Sky Racing World

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