

DRIVING GROWTH IN THE COMPETITIVE WAGERING ENVIRONMENT



TABCORP BUSINESS BRANDS

Tabcorp

AUSTRALIA



Luxbet



TGS



UK

SunBETS

ISLE of MAN

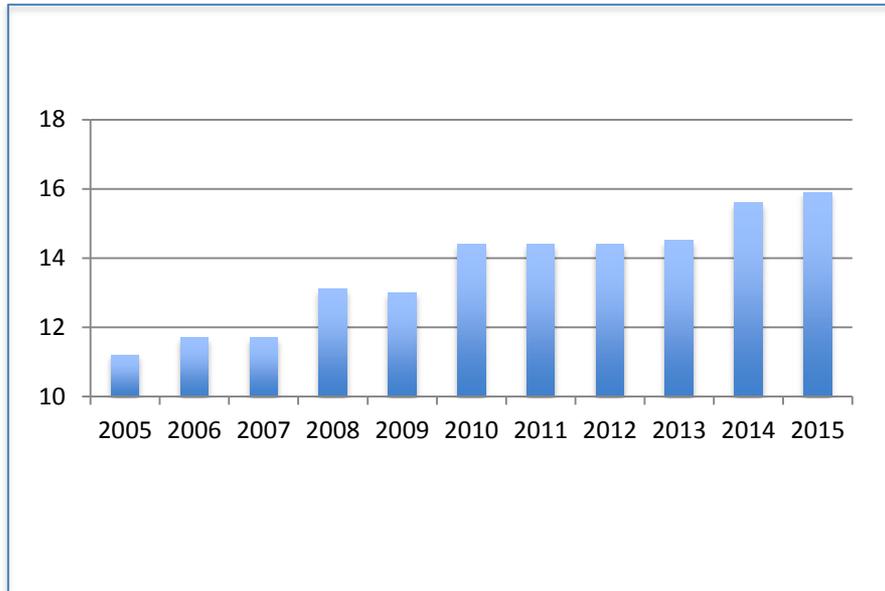


USA



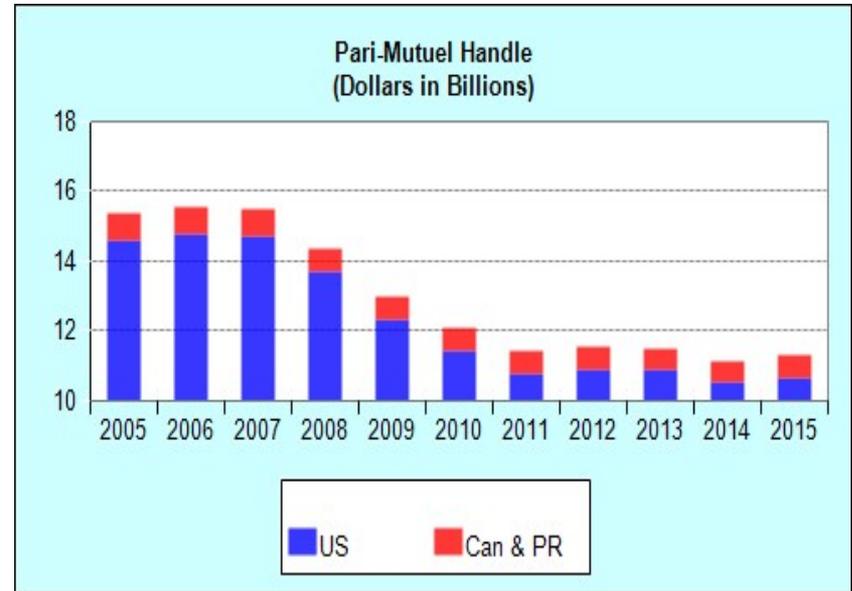
THOROUGHBRED WAGERING MARKET

AUSTRALIA Thoroughbred Handle AU\$ Billion



*Source: Racing Australia Fact Book 2014/5

NORTH AMERICA Thoroughbred Handle US\$ Billion



*Source: Jockey Club Fact Book



CUSTOMER ENGAGEMENT

ENGAGING: “Attractive or interesting in a way that holds your attention”

- *Merriam-Webster*



FLEXI-BETTING

What is Flexi-Betting?

- Allows players to take a % of a wager
 - Opportunity to have a wager with more selections for a % of the dividend
- Example:
 - Bet type: Trifecta Box
 - Amount: \$10
 - Selections: 1, 2, 3, 4, 5
 - Flexi-Bet: 16.66% [player will receive 16.66% of the dividend]

Which Bet Types offer Flexi-Betting?

- Exacta, Quinella, Double, Duet, Trifecta, First 4 (Superfecta), Quaddie (Pick 4), Big 6 (Pick 6)

What are the Benefits of Flexi-Betting?

- Allows players to get in the game and invest at the level they are comfortable with
- Creates consistent winners
- Increases churn factor
- Keeps players engaged



FIXED ODDS

Allows player to take a fixed price at time of wager

- Racing wagering market is 67% pari-mutuel and 33% fixed odds
 - Fixed odds grew by 16% last year
- Customers have the ability to compare prices and select a pari-mutuel wager or a fixed odds wager
 - Available via all channels
- Option to build a wager across races, tracks and sports
- Provides flexibility for operators and customers
 - Create markets
 - Select races, tracks, thoroughbred, harness, greyhound, sports...
 - Cash-out option
- Creates interest in early markets or morning line markets



CASH-OUT QUADDIE [PICK 4]

What is the 'Cash-Out' option?

- Allows players to 'cash-out' a Pick 4 after leg 1, 2, or 3
- Ticket stays in the pari-mutuel pool
- Wagering operator offers player a 'cash-out' price and if accepted by the player, operator 'owns' that ticket
- Available on races with a Fixed Odds market
- Option for partial 'cash-out' e.g. player takes a 50% cash-out and remaining 50% is a live bet

What are the Benefits?

- Gives players the choice to 'cash-out' at any stage or 'let-it-ride'
- Keeps players engaged
- Increases churn



VIRTUAL RACING [TRACKSIDE]

- Wagering on Virtual Racing (Thoroughbred, Harness & Greyhound)
 - Race run every 3 mins
 - On-screen form guides
 - Available in ~3,000 outlets
 - Traditional racing bet types (including flexi-betting)
 - Always 12 runners per race
 - Fixed payouts
 - Annual handle ~AU\$500M
- Benefits:
 - Compliments 'live' product
 - Keeps players engaged
 - Educates 'non-traditional' horse players
- Currently offered under license in MD [RaceTrax] with annual sales of ~\$150M



SKYRACINGWORLD.COM

