

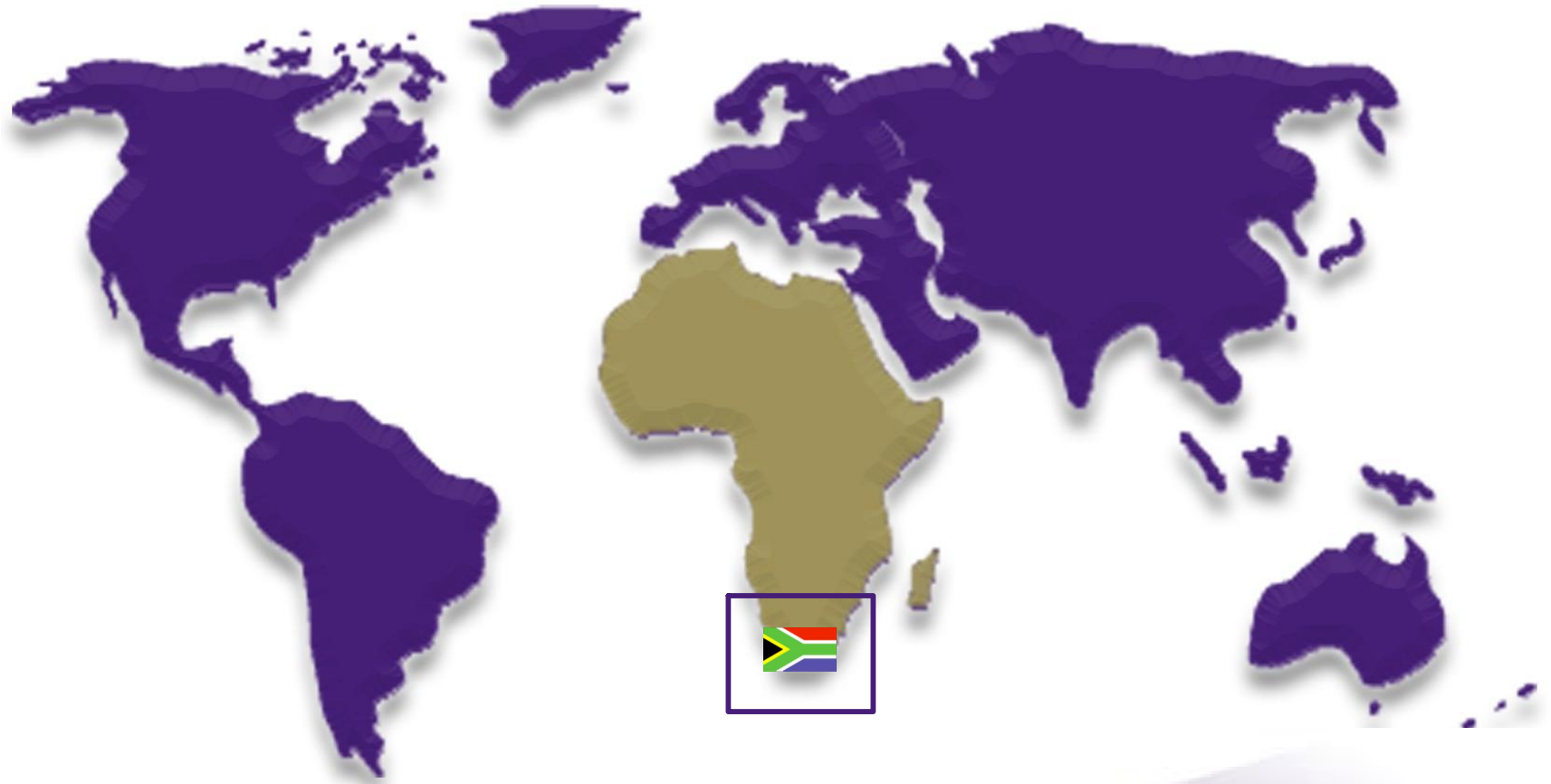


**MANAGING MEDIA RIGHTS TO
MAXIMIZE VALUE**

**SOUTH AFRICA –
PHUMELELA GAMING & LEISURE
DERRICK WIID**



SOUTH AFRICA





CONSOLIDATION

TRAINING CENTRES

BROADCASTING

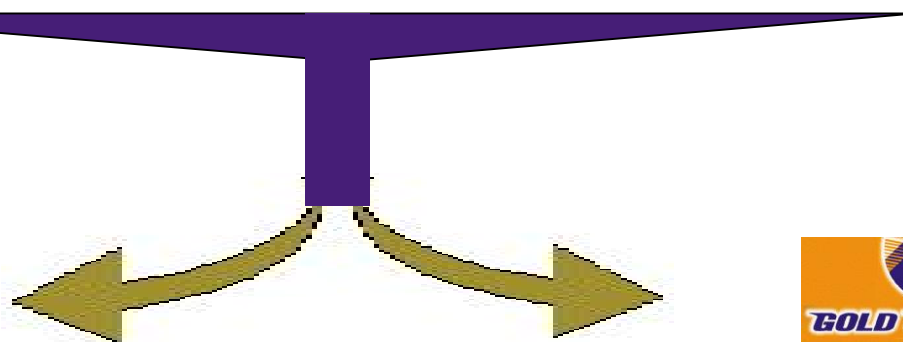
TRANSPORT

13 RACE CLUBS

7 OTB GROUPS



**Racing division
Betting division
Management**



**Racing division
Betting division
Management**



- Tellytrack
- Racing International
- Saftote
- Publishing

SOUTH AFRICAN PROVINCES



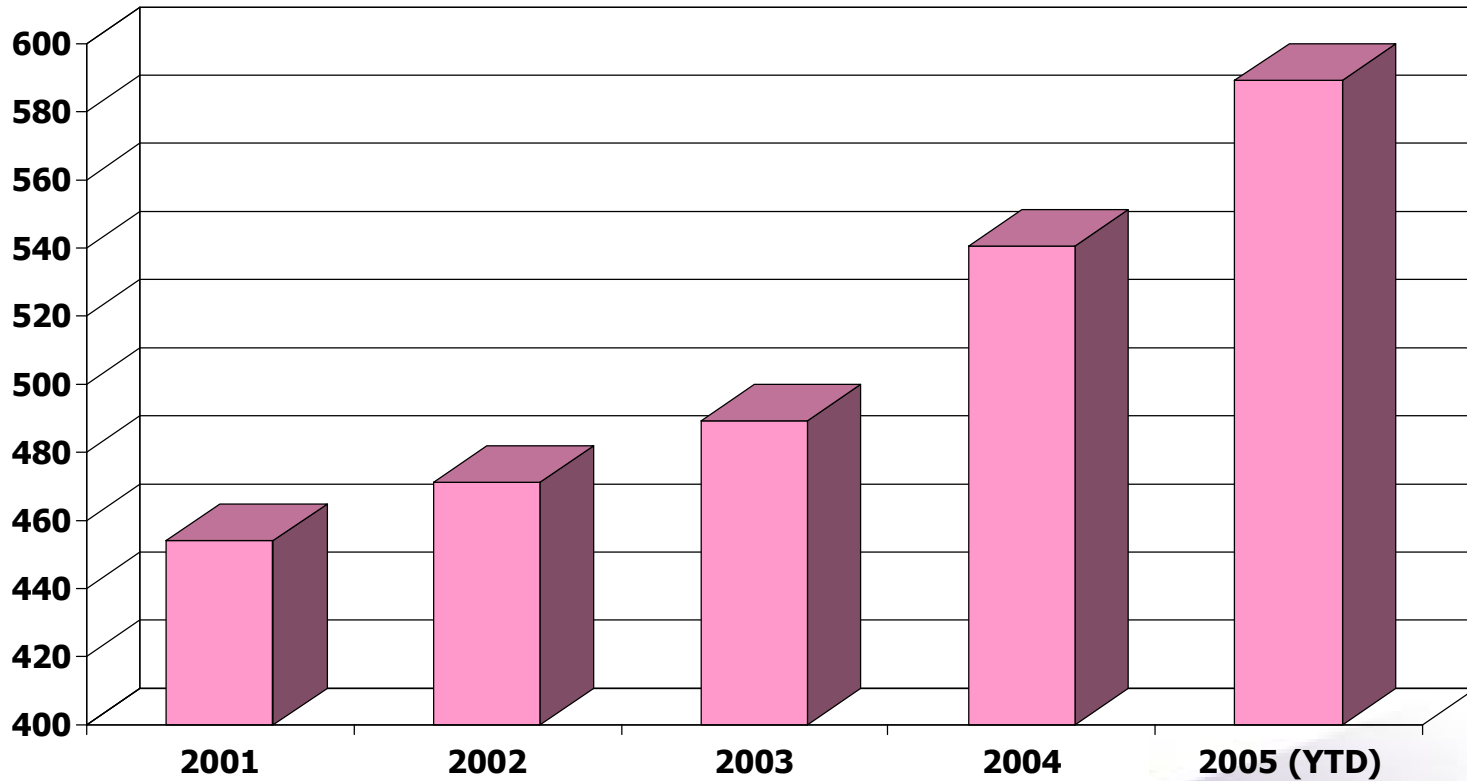


SOUTH AFRICAN HORSERACING STATISTICS

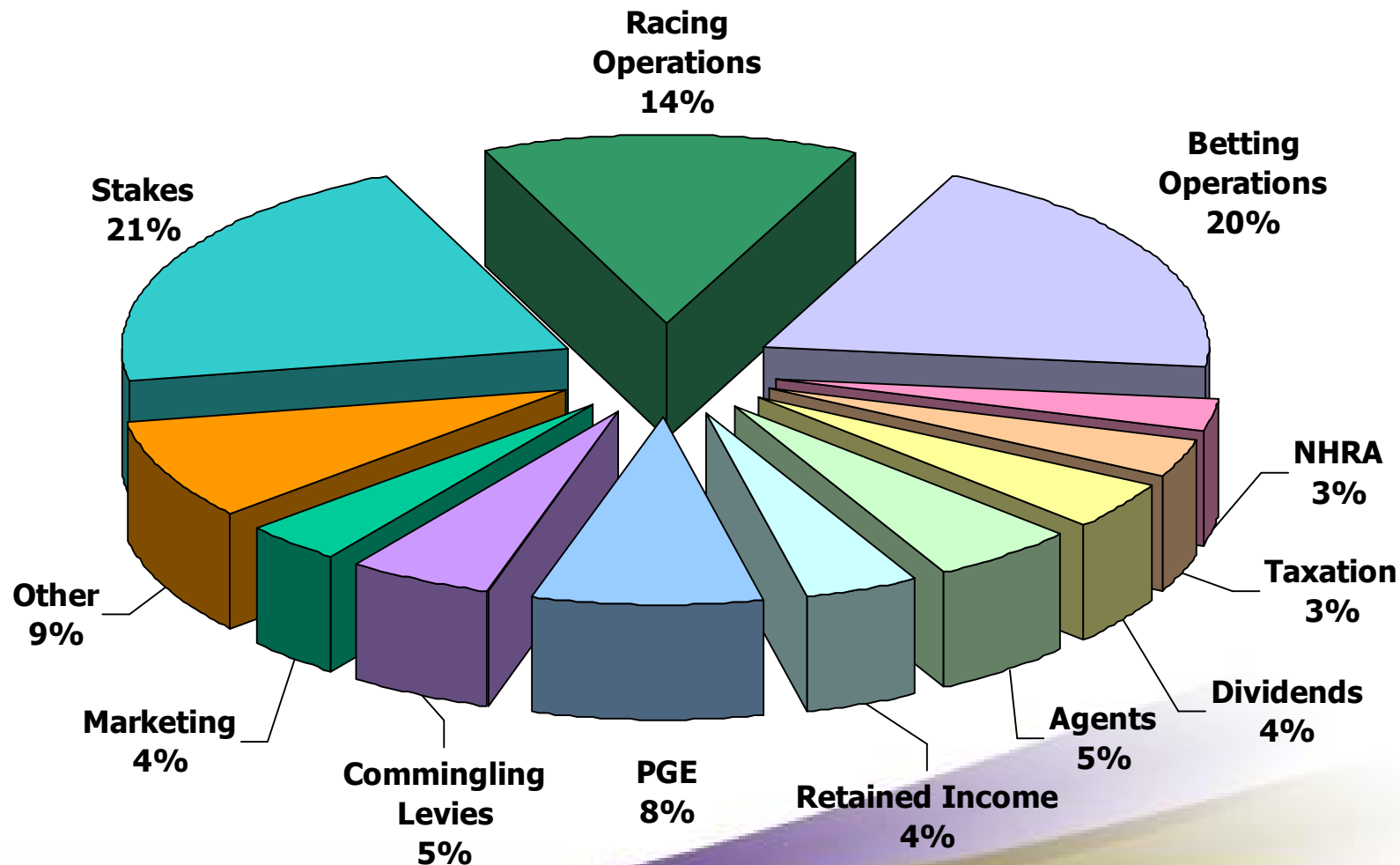
- 12 race tracks
 - 2 all weather
 - 2 with lights
- Racing 363 days per annum
- 517 race meetings per annum
- 4,220 races per annum
- Approximately 7,000 horses in training
- 400 totalisator betting outlets
- 3 call centres
- Internet betting platform
- GPRS betting platform
- \$846 million annual turnover (\$307 million fixed odds)



ANNUAL PARI MUTUAL TURNOVER (\$ MILLION)

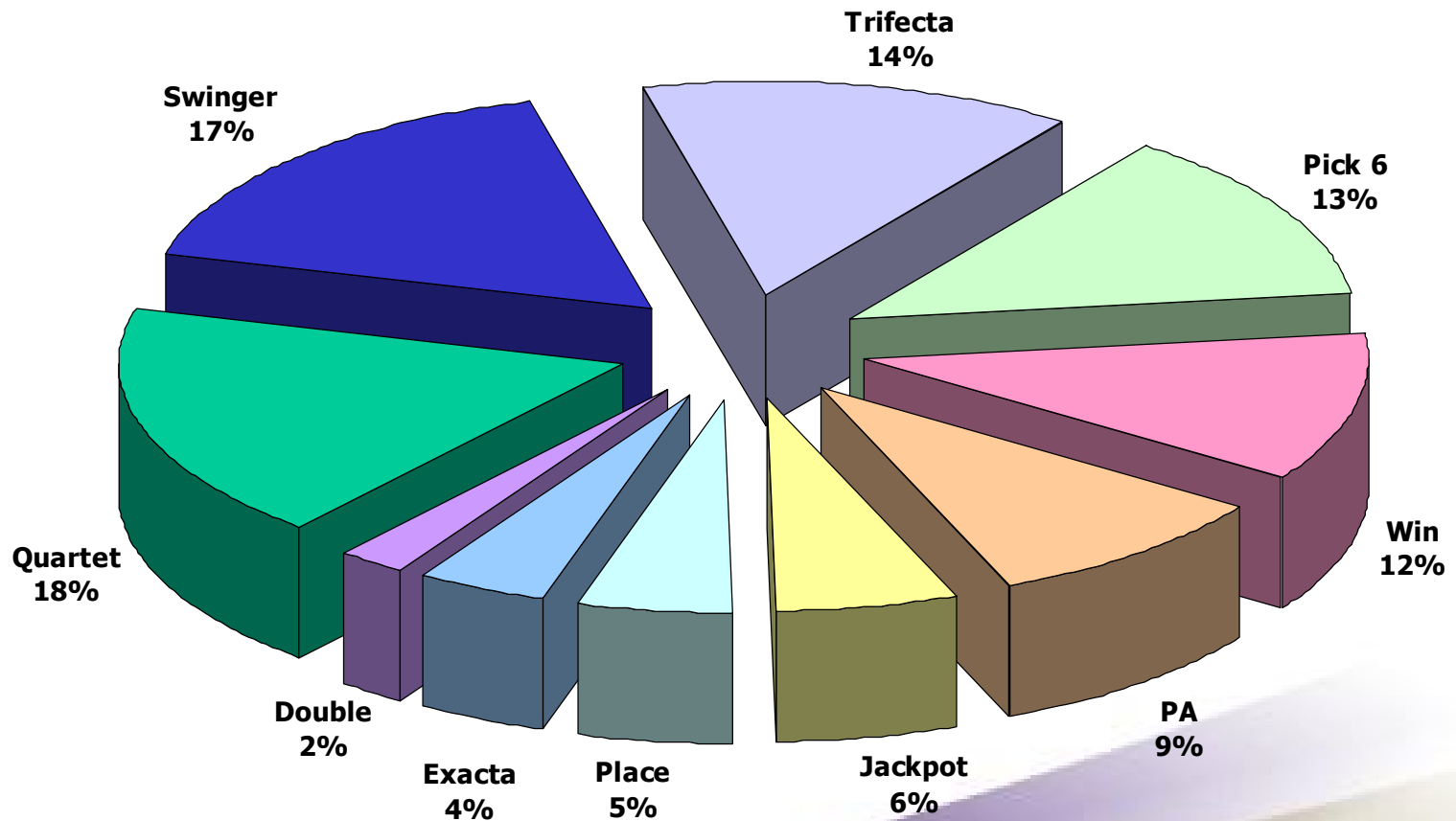


PHUMELELA NET INCOME DISTRIBUTION





DISTRIBUTION OF TURNOVER BY BET TYPE

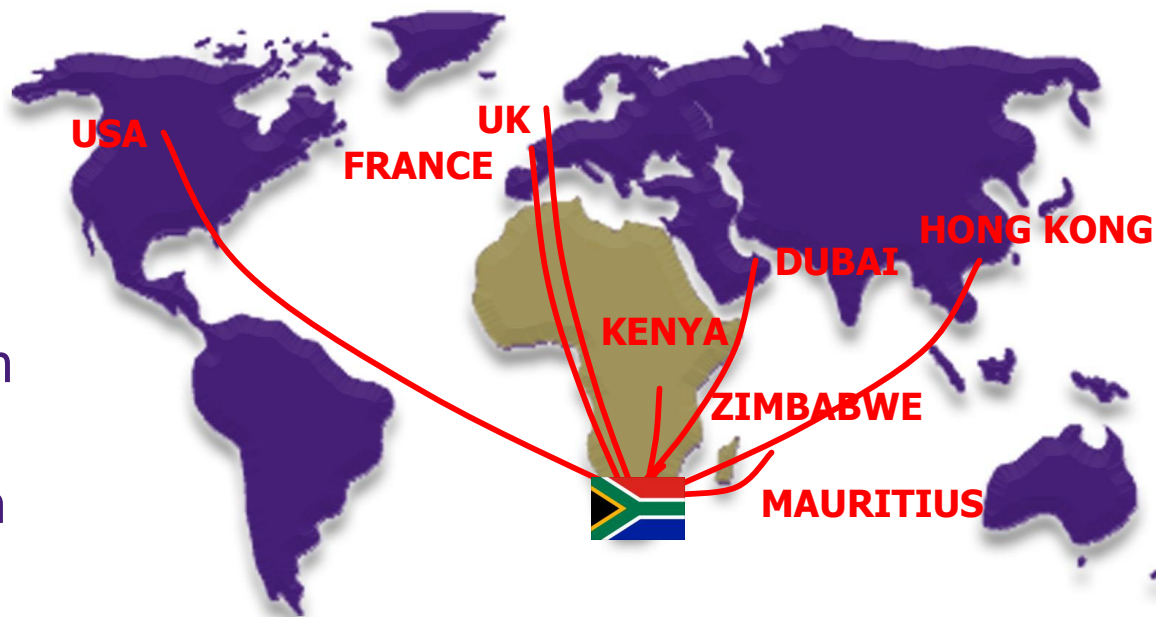




INBOUND SIMULCAST

Benefits of imported simulcast

- Increased interest in racing
- Increased turnover
- Continuity
- Reduced risk
- Better asset utilisation
- Reduced reliance on local horse population





BENEFITS DERIVED FROM UK SIMULCAST

- Rights to 31 of the 59 UK race tracks, including 11 of the 12 “Super” tracks.
- Over 670 racing fixtures per annum.
- Over 4250 races to bet on.
- Over 100 group races are screened live on Racing International channel.
- These comprise the likes of the One and Two Thousand Guineas, the Derby, the Oaks, the St Leger and Coral – Eclipse Stakes.



Thank You

