



# The Digital Agenda and Responsible Gaming

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# PMU: a major actor facing the opening of its online market

- **Biggest betting company in Europe**

- € 9.3 billion turnover in 2009 (+0,4 %)
- 27 % of the total betting and gambling market in France

- ***PMU.FR*, the first betting website in France**

- € 661 million turnover in 2009 (+22 % vs 2008)
- Available on Mobile phone, iPhone, iPad (soon)
- Almost 500,000 customers online
- +58,5% growth Q3 2010, +32% YTD

- **Other key figures**

- 6.5 million customers
- more than 2 billion bets registered a year, 3 billion transactions
- 11,000 betting outlets



# Main features of the French opening on-line market

- **Opening of the online betting and gambling market: horse racing betting, sports betting and poker**
  - Objective: prevent money laundering and protect consumers
  - Licences required for any on-line gambling company operating in France
  - Monopolies on lotteries and off-line casinos
- **A strong regulation with a new independent authority, ARJEL:**
  - Regulate the online gambling market
  - Fight against illegal operators
- **PMU: both an historic operator and a new entrant**
  - Monopoly maintained in outlets
  - Continuation of parimutuel betting on horseracing (offline and on-line)
  - Licences for sport betting and poker



# In 2010, PMU becomes a global operator

## PMU leads an offensive strategy to face competition:

- **Keep customers loyal to PMU**
- **Gain new customers throughout sports betting (launched in June) and poker (launched in July)**
- **Cross-sell between all businesses and increase customer value**
- **Defend horse racing betting and pari mutuel**
- **Secure horse racing funding:**
  - PMU paid € 731 million net profit to Horseracing Associations in 2009



# PMU's view of responsibility

- **Be conform to the legislation**
- **Offer a secure and reliable operating environment for e-customers**
- **Finance the equine sector and contribute to its development** (more than 74,000 direct jobs and 7,000 equestrian establishments)
- **Prevent customers from risks of excessive gambling by a Responsible Gaming Policy**



# PMU's assets for further commercial developments

- **The most comprehensive offer on the market**
- **The most accessible offer with a multi-networks strategy**
- **High quality of service provided by a unique IT structure**
- **A reliable brand that consumers trust**
- **A highly rated racing offer at the international level**

**Thank you**

