

Interactive Business Presentation

Ralph Topping Chief Executive

Agenda



- Introduction – Ralph Topping
- Sportsbook – Ralph Topping
- Orbis – David Loveday
- Orbis project management – Phil Moyes
- Gaming - Ian Chuter
- Summary – Ralph Topping
- Q & A

The growth story



- Betting AND gaming
- New ideas, new partnerships
- A major internet player

The way to online strength



- Customers
- Brains
- Technology
- Product
- Brand
- Marketing
- Customer service
- Customer relationship management
- Payment systems
- Localisation
- Languages

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Sportsbook



EURO 2008 Stats
Teams, Fixtures, Groups & More

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A soccer player in a white jersey with a German flag on the sleeve, looking towards the camera.

Launch our live console
NOW : French Open Tennis

Competitive landscape – Sportsbook



FY 2007	GW (£m)	WH Market Share
UK	326	11%
Europe	1,088	4%
Worldwide	2,516	2%

- Online competition delivering double digit growth
- Competitive environment is fierce - 388 sportsbook sites
- Sportsbook constrained by technology

Data Source : GBGC May 2008, GW quoted in £m

Short term initiatives



- Content
 - Streaming: Watch&Bet/RUK/Gotto/ATR
 - Information: horserace form – Racing Post data
 - Radio: Betlive - Euro 2008/Wimbledon
- Access
 - Tool bar: <http://euro2008betting.toolbar.fm>
- Other
 - Competitive pricing
 - Client management

Longer term initiatives



- Content
 - Tote betting
 - Asian handicaps
 - More Betlive markets per event
- Website localisation and languages
- Expanded range of payment methods
- Improved CRM/customer profitability
- Marketing
 - Resources
 - Affiliate management

David Loveday
Orbis CEO



Orbis overview

- Offers modular, product based betting system to Europe, Australia, Asia
- Founded 1996, sold to NDS Nov 2000
- Used by over 20 of the world's largest operators including: Ladbrokes, BlueSquare, SkyBet, Macau Slot & Paddy Power
- Experienced in migrating large customers onto OpenBet including Centre Bet, Tote Sport etc
- Modular and open
- William Hill specific team – flexible and scalable according to unique to customer business requirements
- Experienced in regulated environments
- UK based development
- Offer long term commercial value against multiple software suppliers and in-house development

Benefits of using OpenBet software

- One account, one wallet benefits consumer and bookmaker
- Built and driven by the customer
- CRM solution
- Proven and scalable
- Global range of bet types - in running, over and under, Asian handicap etc
- Flexible range of payment methods
- Fully multi-lingual / multicurrency
- Fully multichannel – TV, web, mobile, retail
- Unlimited white label capability

Phil Moyes

Group Programme
Director

Orbis Implementation

27th November 2008

Programme update



- Time – on track for end November delivery
 - Delivered and completed testing for iteration 1 of 5
 - Iteration 2 currently being delivered into test
- Cost – within original budget
- Risks/issues – effectively managed and mitigated

Delivery and assurance



- Programme board: total commitment all the way up to and including the Chief Executive – ensuring prompt decision making and supply of key resources
- Programme manager: Phil Moyes - previous experience successfully delivering Orbis solution as Director of IT at Tote
- Project leadership: best of the best brains from both inside and outside William Hill
- Programme assurance: Deloitte
- Technical assurance: BJSS

Summary



- On time
- On track
- On budget

Ian Chuter Gaming Director



Competitive landscape – gaming

- Online competition delivering double digit growth
- Competitive environment is fierce
 - 723 Casino sites
 - 485 Poker sites
 - 257 Bingo sites

Competitive landscape – gaming



FY 2007	GW (£m)	Market Share
UK	476	14%
Europe	1,443	5%
Worldwide	3,829	2%

Data Source : GBGC May 2008, GW quoted in £m

Short term initiatives



- 30 new games launched in last 6 months
- New bonus engine
- Strong supplier management
- Increased marketing
- Active weeks and new accounts up

Bingo

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- TV test campaign
- Six week national campaign started on 5th May
- Mini games

Games



- Sportsbook icon
- New games
- Cross selling
- Instant products
- Live dealer

Casino



- Perspective
- “One Moment” campaign
- New games
- New roulette & blackjack
- New bonus engine

Poker

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- Liquidity
- Tournaments
- Player loyalty
- Flash games
- Private tournaments

Poker liquidity illustration



Rank	Site/Network	US	Cash Players	24 Hr Peak	7 Day Avg
<u>1</u>	PokerStars	Y	9,277	24,611	15,200
<u>2</u>	Full Tilt Poker	Y	3,015	12,240	7,400
<u>3</u>	iPoker Network	N	5,098	10,976	5,200
<u>4</u>	PartyPoker	N	4,341	9,968	4,750
<u>5</u>	Ongame Network	N	3,854	8,321	3,900
<u>6</u>	Everest Poker	N	2,807	6,726	2,650
<u>7</u>	IPN (Boss Media)	N	1,492	3,160	1,440
<u>13</u>	Microgaming Network	Y	871	2,136	1,000
<u>14</u>	PacificPoker	N	813	1,905	930
<u>15</u>	Betfair Poker	N	489	1,323	590
<u>17</u>	CryptoLogic (William Hill)	N	434	1,267	951
<u>18</u>	PKR	N	478	1,143	540
<u>19</u>	Ladbrokes	N	363	1,110	460

Current focus



- Games development
- Improved affiliate software – August
- Site revamp
- Brains
- CRM
- VIP software and account management

Ralph Topping
Chief Executive

Summary



- Sportsbook
- Gaming
- Brains
- Marketing

Q & A