



Analyst and investor day

25 November 2009

# Today's presentations

## 1. Strategy

## 2. Retail

## 3. Industry update

## 4. William Hill Online

## Ralph Topping, Chief Executive

Ian Chuter, Group Director of Operations

David Steele, Corporate Services Director

Henry Birch, Chief Executive, William Hill Online

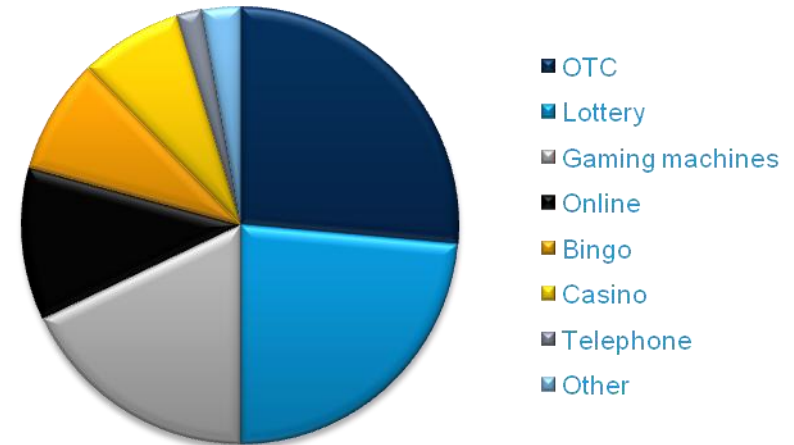
Jamie Hart, Sportsbook and Trading Director



# A leading betting and gaming business

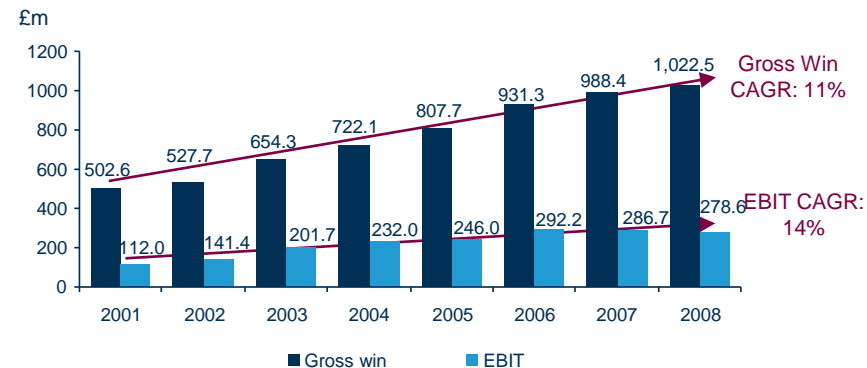
- A leading betting and gaming company
  - 49% of net revenues from gaming
- Operating in three of the top four gambling product areas
- Retail – 80% of net revenue
- Online – 17% of net revenue
- Telephone – 3% of net revenue
- Betting **and** gaming
  - 51% betting (OTC, Sportsbook, Telephone)
  - 49% gaming (Machines, online poker, online bingo, online casino)

## UK gambling market by product (£bn)



Source: Gambling Commission, Industry data 2008/9

## Group financial performance 2001-2008



Source: Company reports

# Our three channels



**The market leader in UK high-street betting and gaming**



**Top 3 European online betting and gaming business**

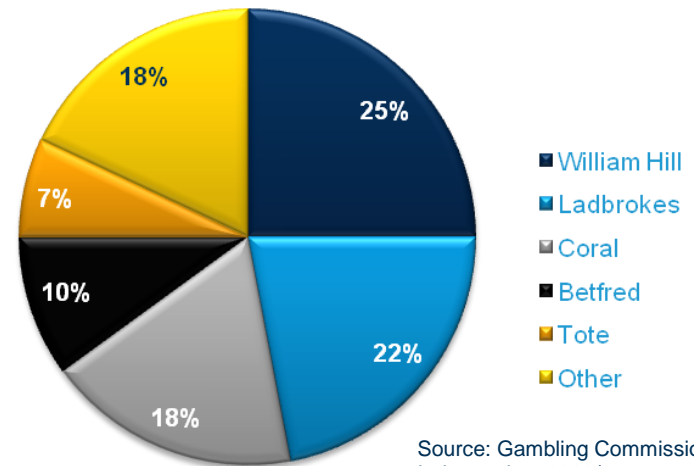


**A market leading telephone betting business**

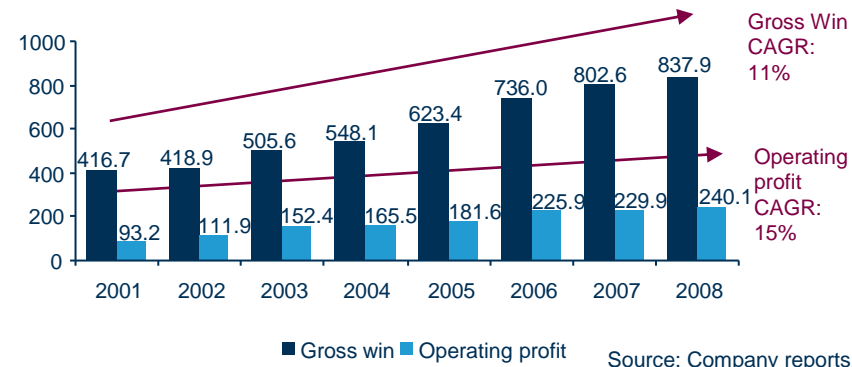
# The market leader in the UK high-street betting market

- Market leader in mature, stable market
- Trends
  - Capitalised on progressive liberalisation, step-changes from fiscal and regulatory changes
  - Strong growth in machines, football, virtual
  - Catering to changing customer preference for “entertainment” products – easy to use, constantly available, quick results
- Questions for today
  - “Is Retail’s customer base in terminal decline?”
  - “How can machines grow now you’re at maximum density?”
  - “Why is your OTC gross win margin so high?”
  - “Haven’t you underinvested in your shops?”

## Split of total betting shops (c.8,800 in total)



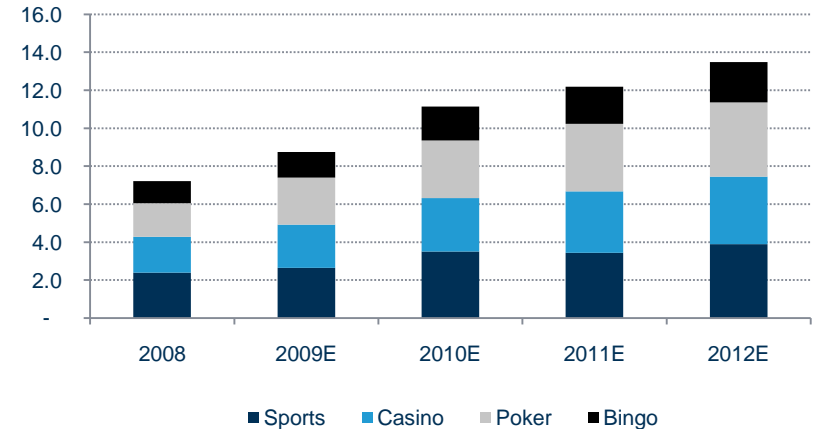
## Retail financial performance 2001-2008



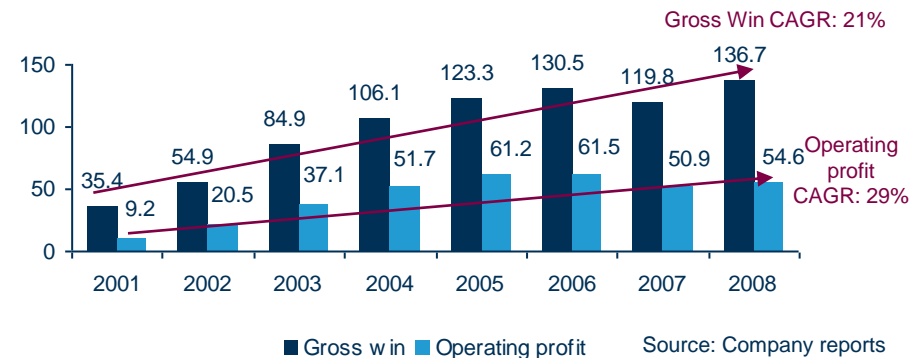
# Top 3 European online betting and gaming business

- Massive growth opportunity: 17% CAGR projected between 2008-12E in Europe
- Where we have come from
  - UK market leader from 1998 to 2004
  - Two years of EBIT decline after period of under-investment
  - Losing out to aggressive competitors
  - Sportsbook restricted by technology
  - No gaming expertise
  - Illiquid poker platform
  - UK-centric customer base
  - Small-scale marketing team

H2GC European GGR forecasts, 2008-2012E



Online financial performance 2001-2008



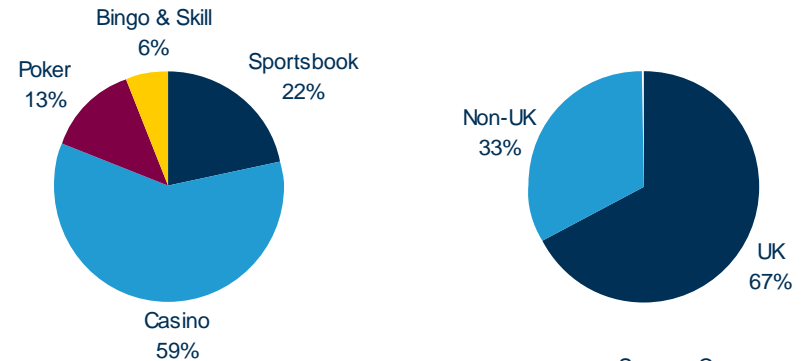
# Top 3 European online betting and gaming business

- Where we are going
  - Transformed in 2009 through creation of William Hill Online
  - Now a top 3 European online betting and gaming business
  - Best-in-class products
  - Product breadth and depth
  - Experienced management team
  - Online marketing expertise
  - International reach

## Questions for today:

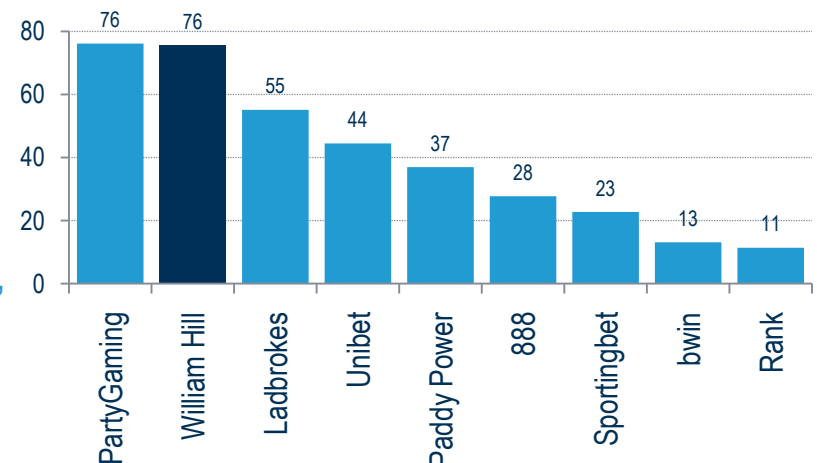
- “What is the online growth opportunity?”
- “How can William Hill Online compete?”
- “How do you balance profits and investment?”
- “Will you participate in consolidation?”

## William Hill Online 2008 pro forma net revenues



Source: Company reports

## William Hill Online 2008 pro forma EBITA position

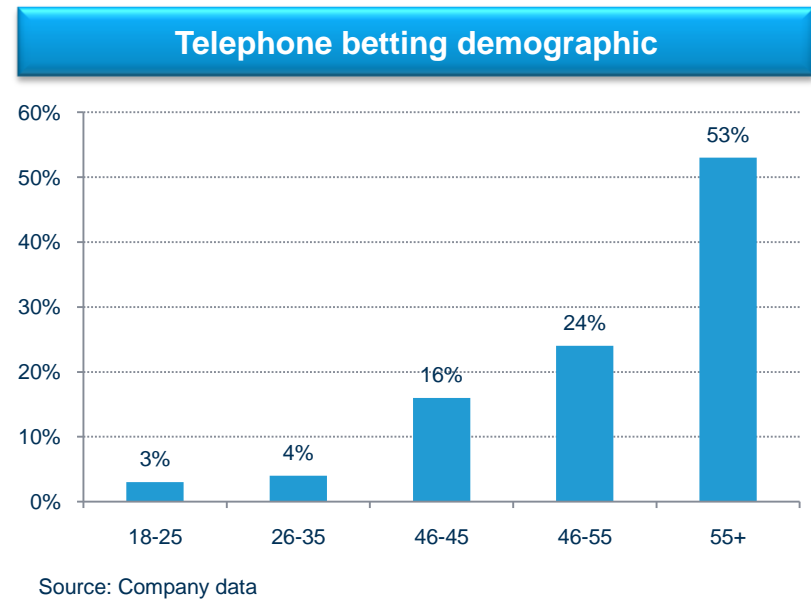


•Forex rates assumptions – \$1.60:£1, €1.1:£1

Source: Company reports

# A market-leading telephone betting business

- Our most mature channel
  - 225,000 customer accounts
  - 121,000 active customers
- Customers tend to be older and more sophisticated punters
  - Higher average bet: £60
  - Loyal, longstanding customers
- Operating in an unlevel playing field
  - Offshore tax position
  - Betting exchanges
- Under review
  - Size of customer base by value
  - Size of customer services/cost base
  - Location





# The right culture for the next 75 years

- Reviewing brand and culture
- More competitive, modernising culture
- Passionate, energetic, knowledgeable, can-do attitude
- New management team
  - Good mix of experience from gambling and other industries
  - Focus on attitude and delivery
  - Entrepreneurial-style culture and remuneration for William Hill Online team

# What we've achieved in the last 18 months

2008

2009

Online business stagnant



Top 3 European online betting and gaming business

Uncompetitive online products



Orbis Sportsbook, expanded in-running, new Playtech-based poker and casino

Spain and Italy operations below critical mass



Withdrawal from Spain and Italy JVs, refocused international strategy to online

Balance sheet concerns



Debt reduced through well supported rights issue, future refinancing risk reduced through diversification into bond market

Old-fashioned, risk-averse William Hill



New management team, new culture

# Key drivers of growth in our three channels



## The market leader in UK high-street betting and gaming

- Expand market share through estate development
- Broaden product range
- Protect cash flows through strong cost control



## Top 3 European online betting and gaming business

- Increase proportion of Group EBIT contribution
- Increase Sportsbook and in-play turnover
- Increase UK and non-UK market share



## A market leading telephone betting business

- A niche channel for a specialist customer base
- Increase profits contribution to Group

# A compelling investment proposition

## **A robust, highly cash generative business with good growth potential**

- Market-leading Retail business
- Online growth opportunity
- Strong cash generation
- Healthy balance sheet

## **Underpinned by strong competencies**

- Superior Retail operators
- Rigorous cost management
- Experienced online team
- M&A track record

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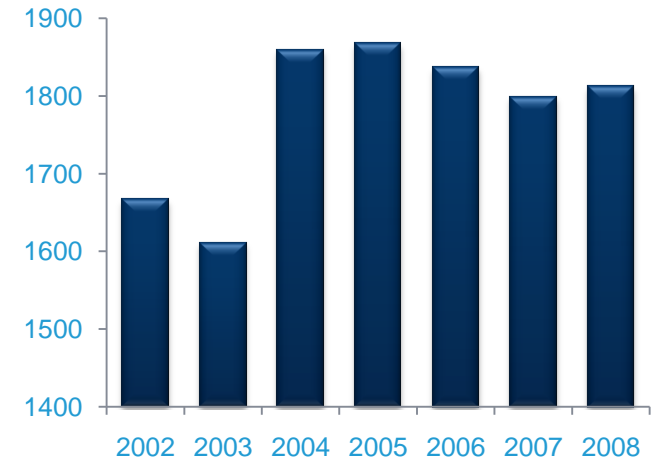
# Agenda

1. **“Is Retail’s customer base in terminal decline?”**
2. “Why is your OTC gross win margin so high?”
3. “How can machines grow now you’re at maximum density?”
4. “Haven’t you underinvested in your shops?”
5. “How is the economy likely to affect you?”

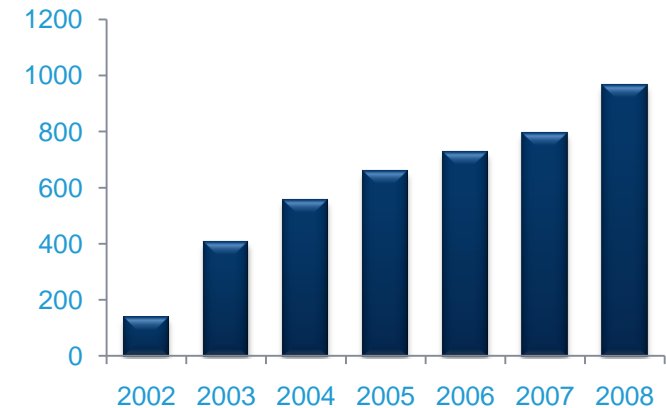
# The Retail industry is evolving

- The product mix is changing
  - Growth of machines, football, virtual
  - 60% OTC, 40% gaming machines
- Customer requirements are changing
  - Constant product availability
  - Customer service and location
  - **Not** price sensitive
- There are increasing barriers to entry
  - Capital intensive
  - Regulatory infrastructure
  - Centralised trading infrastructure
- LBO ownership is becoming more concentrated

Off-course betting gross win (£m)



Gaming machines gross win (£m)



Source of data: H2 Gambling Capital

# A broad customer base

- Different demographic from online
  - Wider range of age groups
  - Blue collar workers
- 40% of customers under 45 years old
- Younger customers attracted by machines and football



- Older, non-working customer
- Singles bets



- Wider range of bet types,
- Highest spend per week of any sports customer

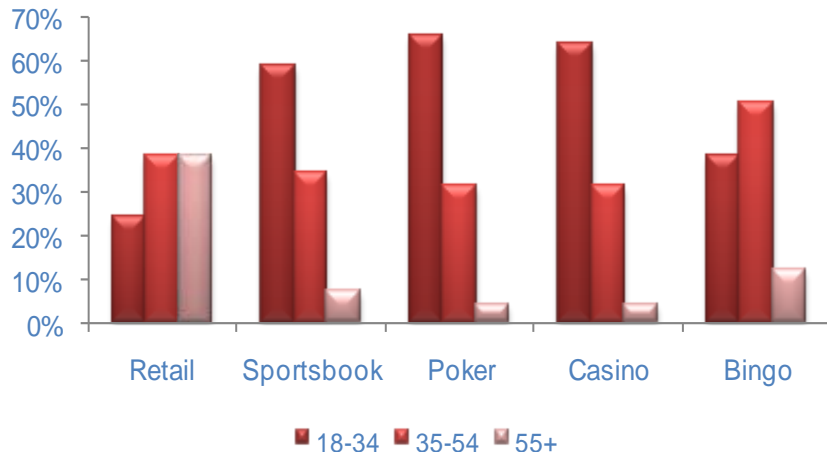


- Younger, working customer
- High proportion of multiples bets



- Younger, working customer
- High frequency of bet, high cross-over with other products

## Retail customers are older than online...



## ...and of a different social class



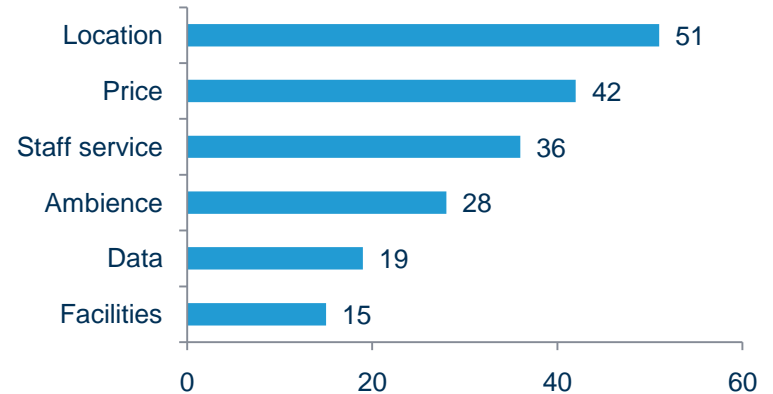
Source: Company data



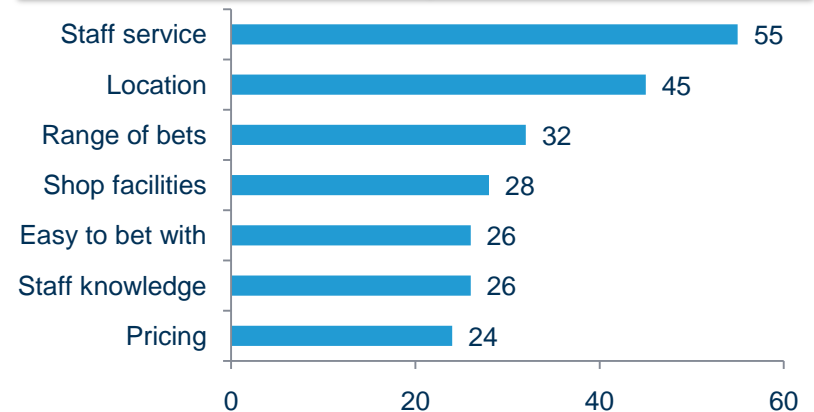
# The customer dynamic: what a customer looks for in a shop

- Why customers choose Retail
  - Thrill of immediate cash rewards
  - Social interaction
  - Anonymity
- Key drivers
  - Location has always a primary driver
  - Increasing emphasis on customer service
  - Customers are not price sensitive
- Our strengths
  - Competition Beating Service
  - Broad geographic reach
  - Broad product range
  - Knowledgeable staff
  - Brand reputation
  - Benefits of scale
  - Best prices – FACT

Most important factors in choosing a betting shop, 2006



Most important factors in choosing a betting shop, 2009



Source: Company data

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# What drives the OTC margin

- Key drivers of change
  - Product mix
  - Sporting results
  - Concessions/free bets
  - Pricing policy

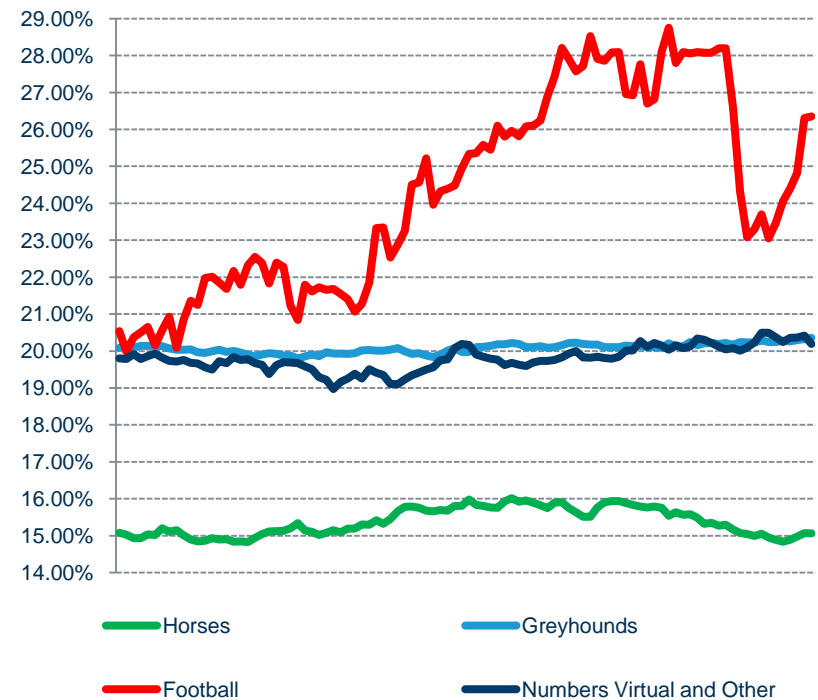
- Five-year OTC margin average 16.8%

2004	2005	2006	2007	2008
16.2%	15.9%	16.3%	17.2%	18.3%

- Margins broadly stable over time for greyhounds, numbers and horses
- Football normally in 20-25% range due to multiple bets and additional markets

**New normal trading range:  
17% - 18%**

## 52-week rolling gross win percentage

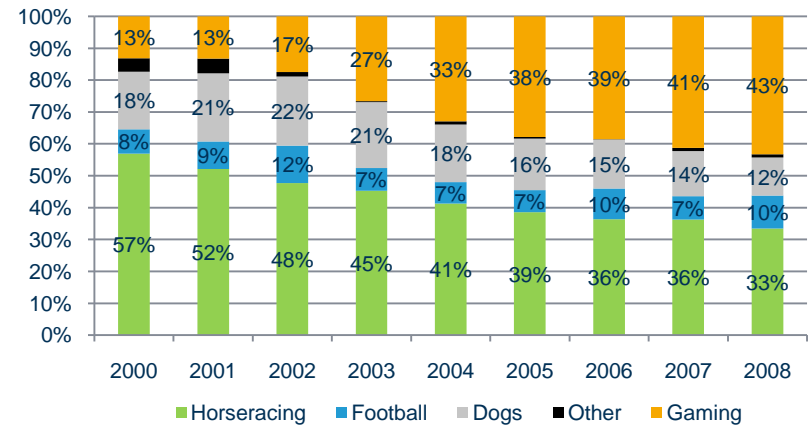


Source: Company data

# The changing product mix

- Moved away from historical reliance on horseracing
- Football: rapid growth supported by media profile/TV advertising
- Virtual: exclusive product, predictable margin, ideal “filler” product
- Machines: constantly available, easy to use, popular with younger customers

## Retail gross win mix by product, 2000-08



Source: Company data

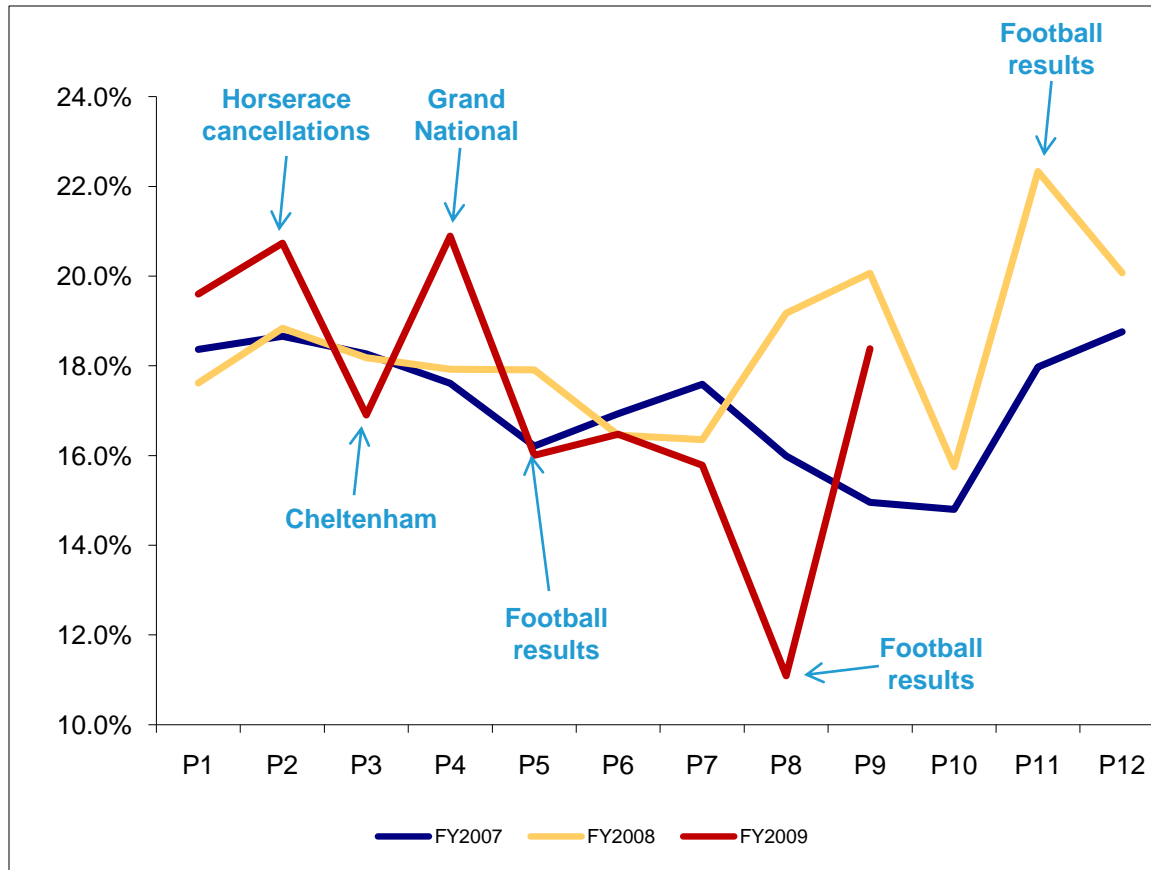
## Retail gross win by product, 2000-08

£m	2000	2006	2008	'00-08 CAGR	'06-08 CAGR
Horseracing	219	267	281	3%	2%
Football	29	71	86	14%	10%
Dogs	69	113	100	5%	-6%
Other	16	1	9	-7%	210%
Gaming	51	284	362	28%	13%
<b>Total</b>	<b>384</b>	<b>737</b>	<b>838</b>	<b>10%</b>	<b>7%</b>

Source: Company data

# How sporting results affect OTC margins

OTC gross win margin (2007 – 2009)



Source: Company data

## Horseracing

- Race cancellations led to higher mix of higher margin products
- Poor results at Cheltenham
- Outstanding Grand National result

## Football

- Strong results in Q4 2008
- Consistent Big 4 results in May
- Lack of draws in August/September

# Concessions

- The ways you can give money away
  - Free bets
  - Bonus vouchers
  - Branded merchandise
  - Days out at sporting venues
  - Non-gaming related gifts
  - Experiences via partnership deals
- The customer perspective
  - Short-term rewards over longer term savings
  - Better odds outweigh loyalty rewards
  - Convenience is the over-riding factor
- Our concessions strategy
  - Local focus
  - National for festivals and tournaments

**William HILL**  
**BEST PRICES FACT!**  
 This season William Hill customers enjoyed more top prices from any other leading bookmaker. We continue to offer the top prices when it matters - MATCH DAY.

**BEST PRICE TABLE 09/10**

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2	Bet365	95%
3	Corral	90%
4	Laodrakas	80%
5	Paddy Power	75%

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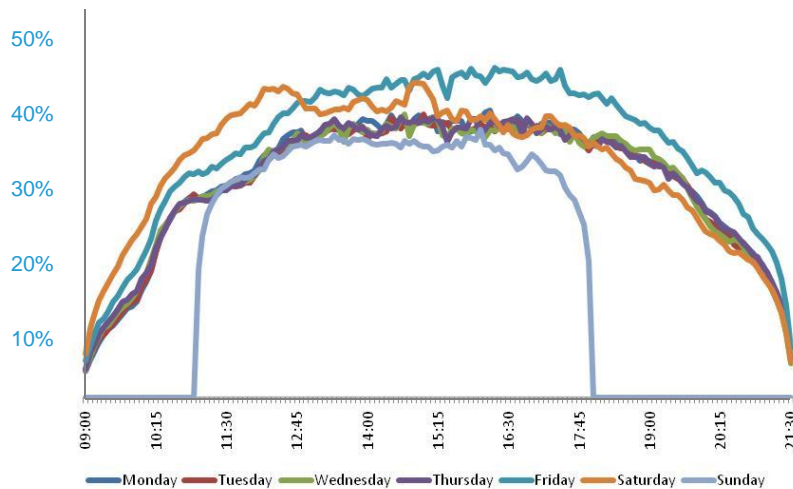
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# Continuing the machines growth story

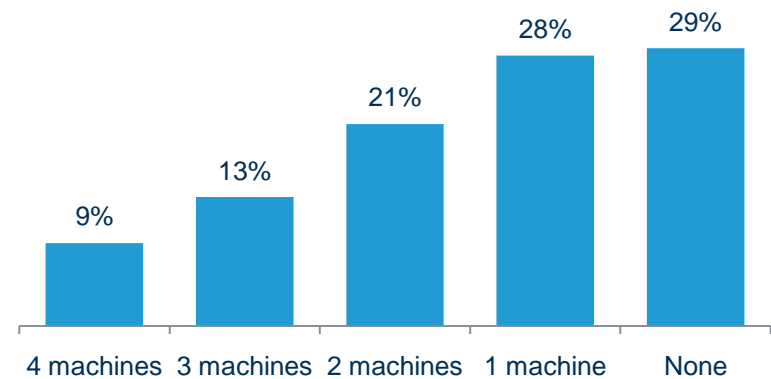
- 8,725 machines as at 30 June 2009
  - 3.8 density since 2007
  - 1-2% more machines p.a. with new shops
  - Sufficient capacity with existing machines
- Revenue-share structure
- Capital expenditure by suppliers
- Driving innovation

## Proportion of gaming machines in play



Source: Company data

## Machines average utilisation



Source: Company data



# How we drive growth

**Product**  
*People*  
**Promotions**  
**Partners**  
**PASSION**  
*Availability*  
*Innovation*



## Our innovations

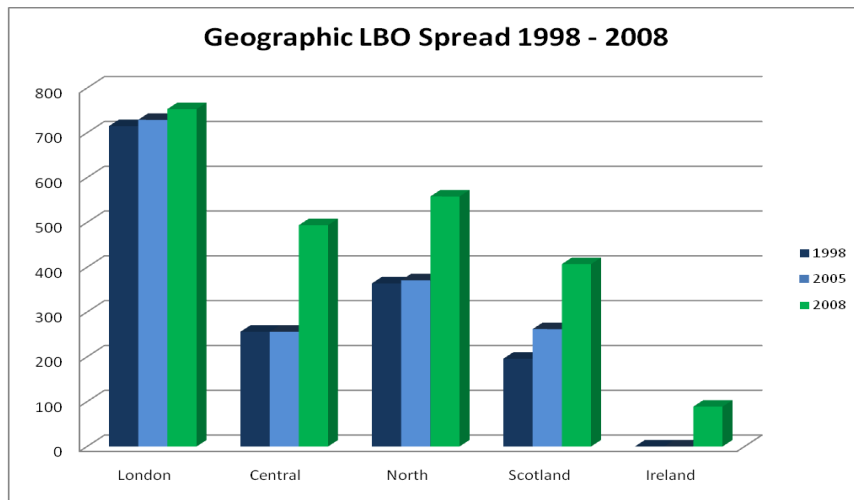
**Exclusive B3 content** Live in shop broadcast Demo mode **Storm**  
Staff training Customer education Press advertising Cat C content  
Remote fix Patents Auto play on B3 Helpdesk automation Power  
save Exclusive B2 content games First line fix £50 note acceptor  
Picture in Picture Monthly promotions Live racing on top screen  
Load credit at the counter **Innovation** Automated diagnostics Staff  
incentives Floor walkers Dual-screen cabinets 22" HD screens  
Video wall software Happy Hours Internal RNG Recycled tickets  
Rainmaker Integrated with EPOS Dual supply Casino note readers  
Supplier incentives Roulette with pots Quickbet In shop Trademarks  
**Supplier tension** Promotions team Slottolette **Business Intelligence**

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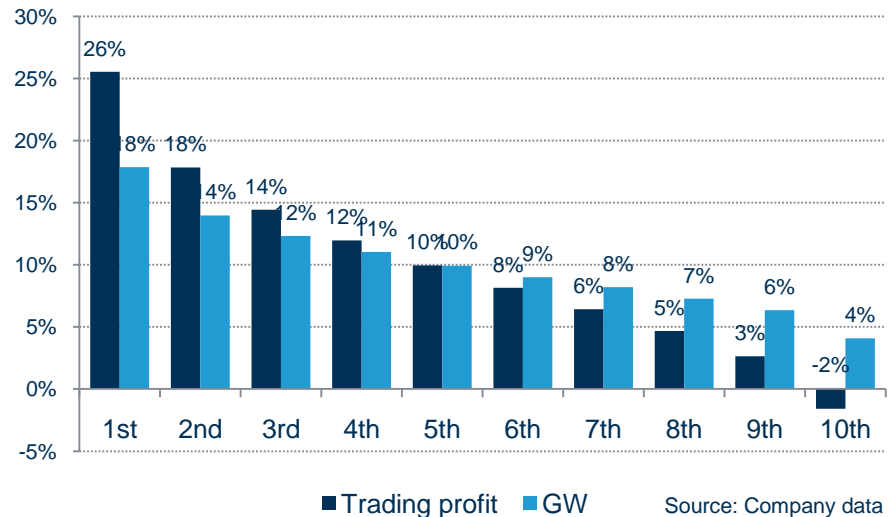
# Today's estate is geographically diverse and has a broad contribution spread

## Geographic LBO spread 1998-2008



Source: Company data

## Contribution of William Hill Retail estate by deciles



■ Trading profit ■ GW

Source: Company data

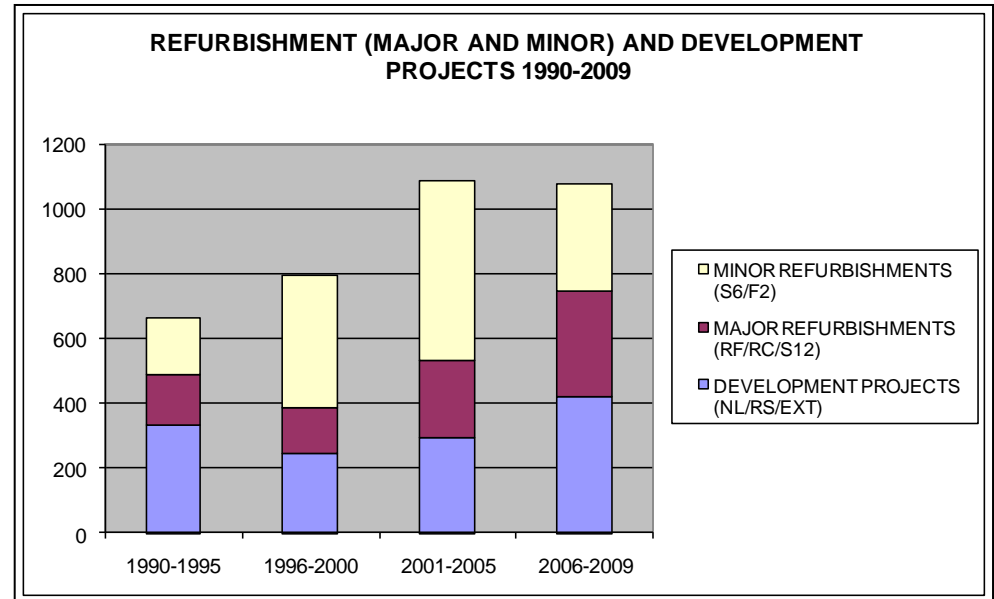
- We have a well-sited, well-invested estate
- A high percentage of shops are making a good contribution
- The tail is well-managed on a case-by-case basis

# Our approach to estate management

## Four targets for capital investment

- New licences
- Re-sites / extensions
- Refurbishments
- Target 15% average Return on Investment
  - 20% on new LBOs
  - 15% on resites
  - 10% on refurbishments

## Overall estate management programme

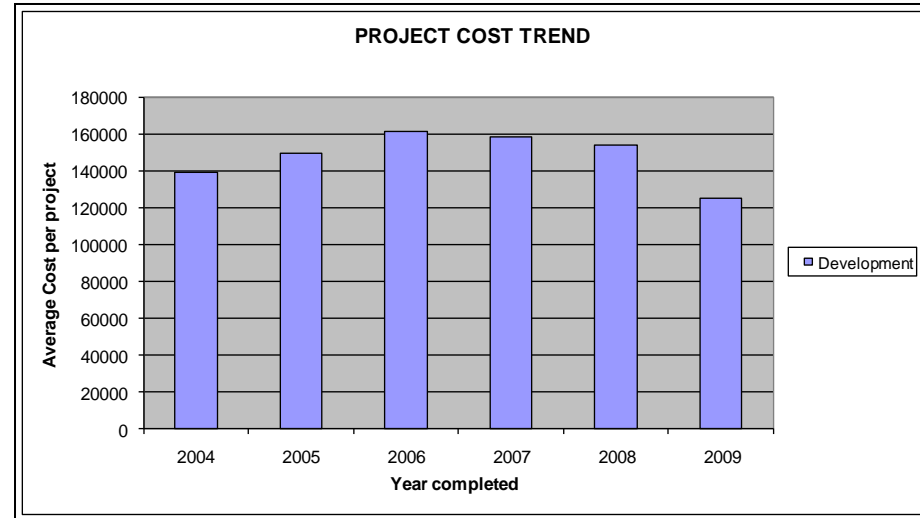


Source: Company data

# Capital expenditure programme: development

- 2005-2008: 164 new LBOs opened
- Currently ahead of 2009 target for 40-45 new LBOs
- £130-160k typical spend on new shops
- On average, 5-10 shops closed a year

## Average cost per project

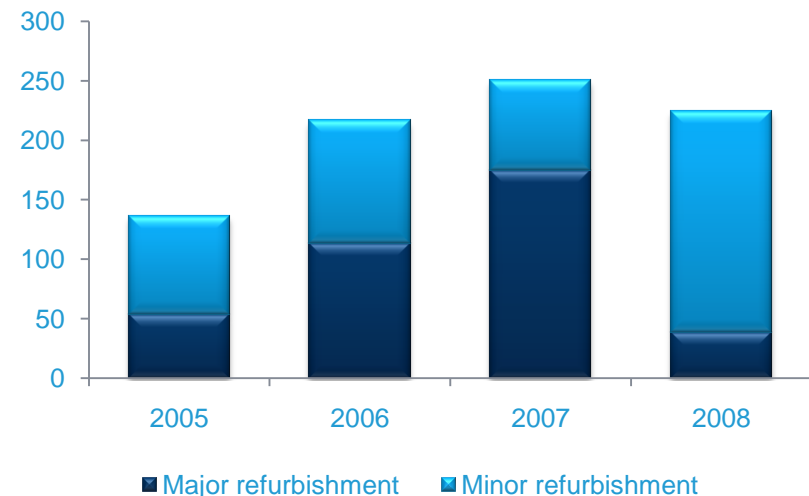


# Capital expenditure programme: refurbishments

## The 18-year refurbishment cycle

- Year 6 refurbishment: <£7,500
  - Redecoration and minor repairs
- Year 12 refurbishment: c.£55,000
  - Mini refurbishment
- Year 18 full refurbishment: c.£125,000
  - Ceilings, floors, toilets, counter, shop front

## Estate refurbishments by investment type



Source: Company data

**c.35% of the estate has had significant capital expenditure between 2005 and 2008**

# Agenda

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# The economic impact

- Trends in 2009
  - Pence per slip down 5-6% in H1
  - Slips down 3-4% in H1 2009
- Horseracing margin weaker
  - On-course pricing competition
  - Lower average number of runners per race
- Supporting resilience
  - Low ticket, high volume business
  - Average bet £8, median bet £2-3
  - Broader product mix than in previous recessions
  - Broad geographical reach
  - Broad customer base

# Answering today's questions

## Your questions

## Our view

Is Retail's customer base in terminal decline?



Strong core customer base different from online, continuing appeal of betting in shops

Why is your OTC gross win margin so high?



Changing mix of products reflects customers' interests; diversified portfolio manages sporting results risk; offer management

How can you grow your machines business?



Highly competitive machines business, continued growth from product innovation

Have you under-invested in your shops?



Only major bookmaker increasing shop estate, careful investment with good returns

How is the economy likely to affect you?



Some top-line and horseracing margin weakness, better positioned than historically

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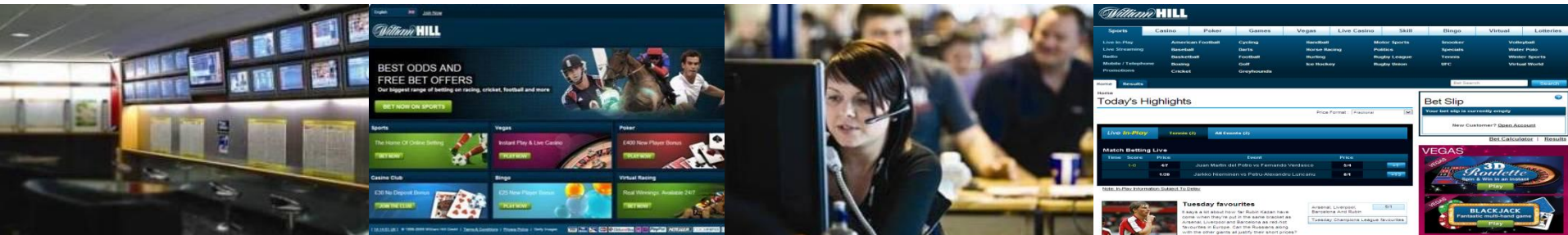
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# Agenda

- Context for the high-street betting sector
- Key regulatory and tax risks
- Landscape for current gaming machine consultation
- Key messages to government

Regulation and tax are not new to this industry

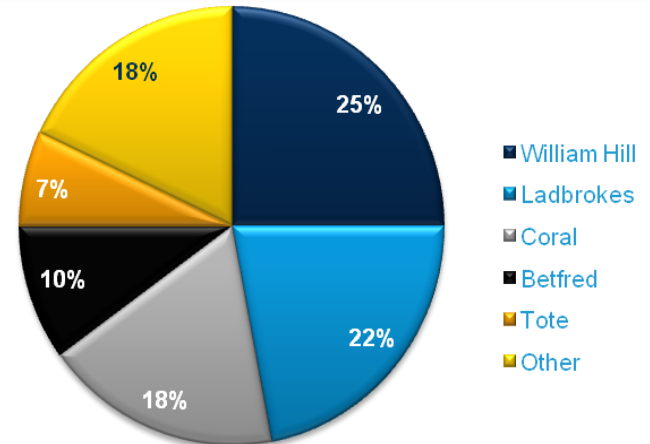
# The UK high-street betting industry today

- Around 8,800 LBOs of varying size
  - Five major operators with c. 80% market share
- 57,600 employees (43,000 FTEs)
- A high turnover/low margin retail industry with total EBIT of £760m

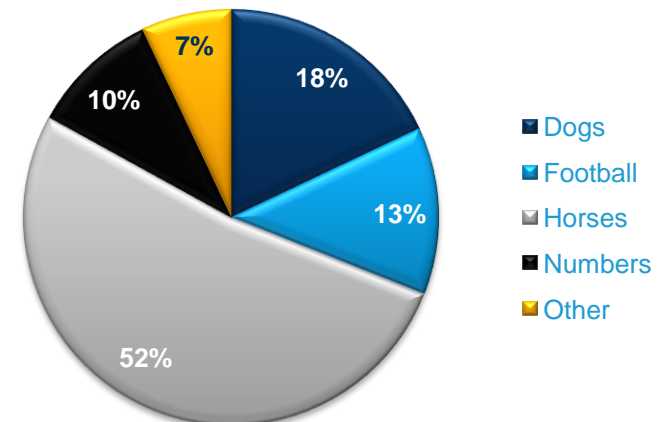
## The industry's contribution:

- £970m a year in tax (including c. £250m GPT)
- £60m in horseracing levy
- £13m voluntary contribution to greyhound industry

Split of total betting shops (c.8,800 in total)



Gross profit split of off-course returns

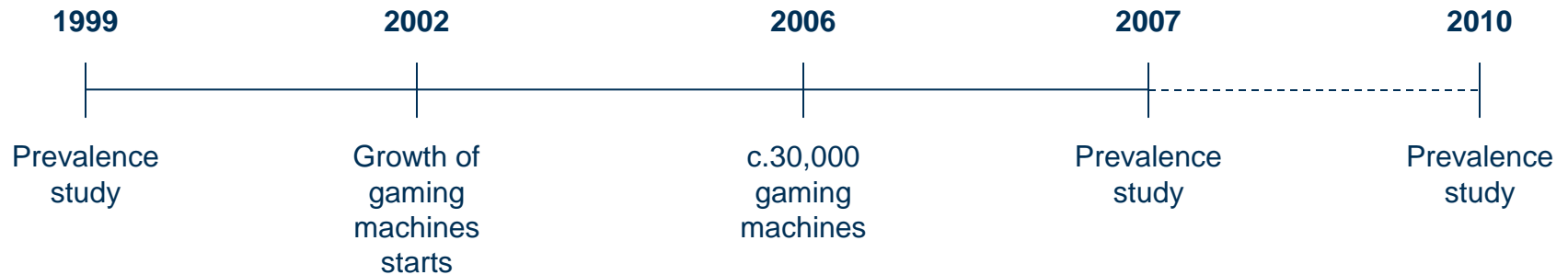


Source of chart data: Gambling Commission, Industry statistics 2008/9

# The UK high-street betting industry today

- We are a major contributor to UK plc paying £400m more in tax a year than an equivalent-sized non-gambling sector
- Changing customer preferences have driven machine growth (c.40% of Retail gross win)
- Operators have faced increased costs
- Horseracing racing relies on the continued health of the industry
- Small shops within the sector are a significant employer

# Gaming machines review (high stakes, high prizes)



- No change in problem gambling despite emergence of B2 gaming machines
- Product of choice for today's betting shop users
- Gambling Commission review, June 2009
  - No consensus on whether gaming machines cause problem gambling
  - More research is needed
  - A priority for the Responsible Gambling Strategy Board
- Positive outcome: data-driven review of problem gambling

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Prevalence Study: percentage of UK adults with a propensity for problem gambling

<u>1999</u>	<u>2007</u>
0.5%	0.6%

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Source: Gambling Commission

# Gaming machines (high stakes, high prizes)

- DCMS and the Treasury aware of importance of gaming machine revenue
- No evidence to support a lowering of B2 stakes and prizes
- We don't expect – and aren't looking for – regulatory relaxation around B2 machine numbers
- Potential for regulatory relaxation around content and delivery



# Gaming machines: Treasury review of tax

- Gaming machines currently taxed through VAT (normally 17.5%) and Amusement Machine Licence Duty (£2,215 for B2/B3 machines)
- Proposal to simplify gaming duties by going over to GPT (currently 15% OTC)
- The industry contributed to pre-consultation on the scope of review - output is due shortly
- Treasury wishes to achieve tax neutral position for gambling industry as a whole
- 18% tax neutral position for bookmaking industry
- Consultation closed 23 October 2009 but implementation unlikely until 2010

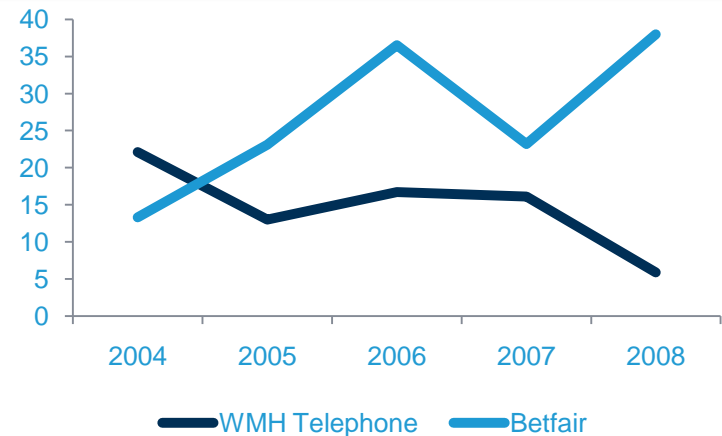
# Horseracing, Telephone, the Levy and the exchanges

- William Hill is **not** opposed to the betting exchange model
- Exchanges attract significant transaction volumes
- Commercial layers (bookmakers) are unregulated on the exchanges
- Lost Levy and GPT – is the horse racing product going backwards?
- The Gambling Commission and HMRC need to focus on unregulated layers
- An unfair landscape is impacting significantly on Telephone business

Levy 2008/2009	£6.2m
Exchange winnings	£62m
Layer/backer winnings	£2-3bn

Source: HBLB Annual Report 2008/9, company estimates

Telephone vs Betfair operating profit  
2004-2008 (£m)



Source: Company accounts

# Key messages to Government

- Industry is heavily taxed – further taxation will lead to job losses
- Horse racing and greyhound racing are highly dependent upon the health of our industry. Cost increases are not sustainable and the Levy needs to be replaced by a commercial agreement
- Create a tax and regulatory environment that supports growth
- Greater regulatory scrutiny is needed of unregulated layers (bookmakers) on exchanges
- We need evidence-based decision making

Before the break...

**Questions?**

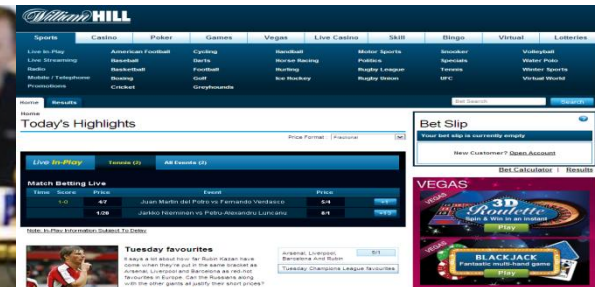
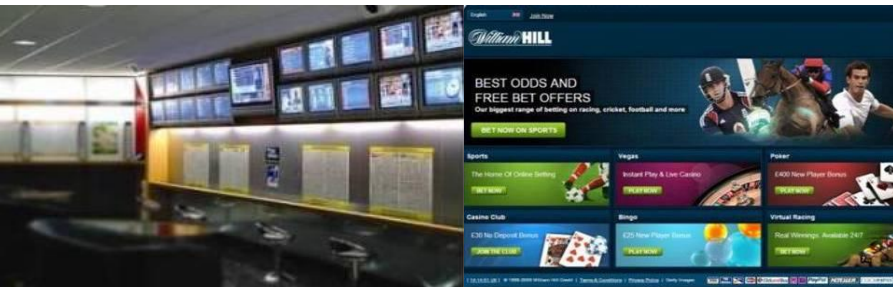


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**Henry Birch, Chief Executive, William Hill Online**  
Jamie Hart, Sportsbook and Trading Director



# William Hill Online: agenda

- The transformation of William Hill's online business
- Analysis of the market and opportunity
- How we will exploit this opportunity
  - Products
  - Marketing
  - International growth
  - Trends
- Goals

# The transformation of William Hill's online business

A year ago

Today

Management lacking industry experience



New management team established, strong industry expertise

Weak products and platforms



New Sportsbook launched, localised, in-play



New integrated and standalone casino sites



New poker site on highly liquid i-Poker network

UK-centric customer base



40% of revenues from outside the UK

Small-scale marketing team



Team of >100 marketing experts with established European marketing channels and 70,000 affiliates

Unlevel playing field with offshore operators



Sportsbook moved offshore

Two years of EBIT decline



Good performance in year of substantial change

**Integration is now complete**



# William Hill Online: where are we now?

## Gibraltar/UK

- c.175 employees
- Senior mgt, head office functions, Sportsbook, gaming, English language customer support, website design, IT product managers

## Bulgaria

- c. 150 employees
- Non-English language, multi-lingual customer services

## Israel

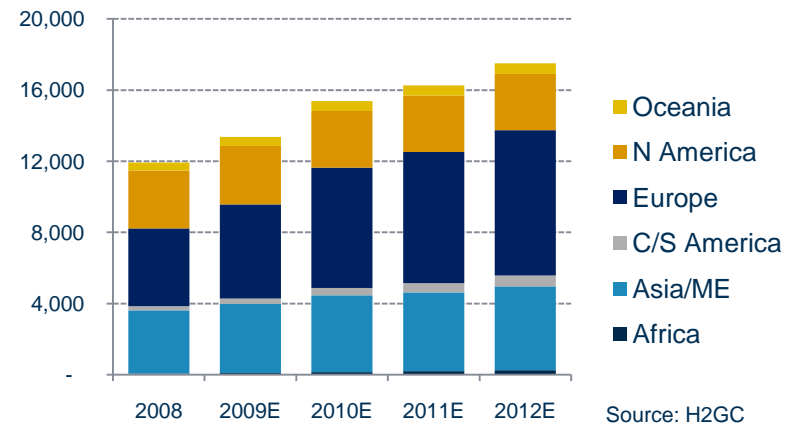
- c. 140 employees
- Marketing, affiliate management, gaming, VIP gaming, CRM management



# Key themes of the external environment

- Markets are following the UK in liberalising
  - Europe
  - RoW
- Gambling is becoming more socially acceptable
- Long-term structural trends are positive
  - Growth of computer usage
  - Broadband penetration
  - Internet penetration
  - Mobile usage
  - Live sports broadcasting
- Low barriers to entry, higher barriers to success

Gross gaming yield by region (\$m)



## Gross gaming yield in Europe

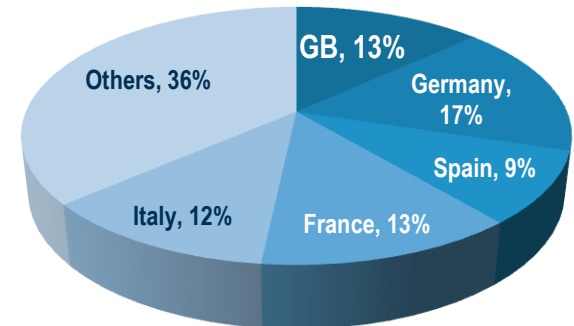
2008                      2012E  
£7.2bn                      £13.5bn

Source: H2GC

# The benefit of liberalisation

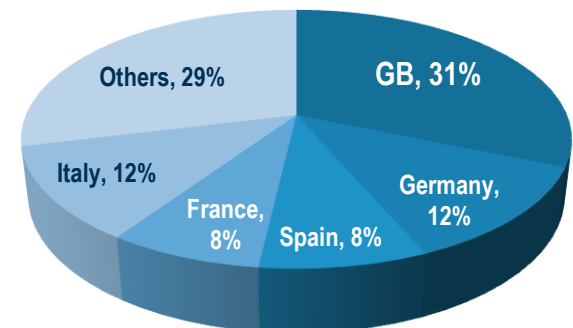
- Liberalisation and subsequent mass-market advertising can lead to a step-change
- If the EU market reflected the UK's liberalisation experience, its value today would increase from £3.4bn to £10.4bn
- Liberalisation is expected to drive fastest growth

## Population split, EU Member States



Source: WorldBank

## EU online gambling market by territory, 2009E



Source: H2GC, Sportsbetting, casino, poker and bingo only

## Key EU territories ranked by market size and growth rates

	2009E size, £m	2010E growth, %	2009-12E CAGR, %
UK	1,382	13%	7%
Germany	595	10%	3%
Sweden	576	12%	6%
<b>Italy</b>	<b>570</b>	<b>70%</b>	<b>31%</b>
Spain	404	16%	20%
<b>France</b>	<b>373</b>	<b>80%</b>	<b>33%</b>
Greece	151	20%	9%
Ireland	150	34%	17%
<b>Denmark</b>	<b>128</b>	<b>40%</b>	<b>34%</b>
Netherlands	128	10%	7%
Austria	121	14%	8%

Source: H2GC, US\$:£ = 1.65 (Nov 09)

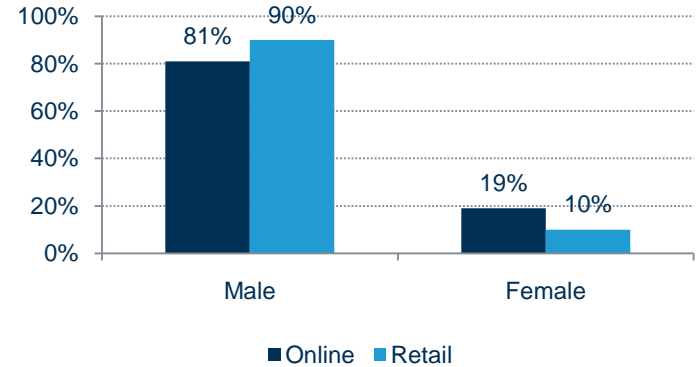
# Market challenges

- Economic environment
  - Impact of the global economic slowdown likely to continue to be felt in 2010
- Extent of liberalisation
  - Likely short term impact of higher taxation and product restrictions
  - BUT open advertising market
- Competition
  - New entrants from different geographic markets
  - Non-core gambling companies – e.g., media, retail

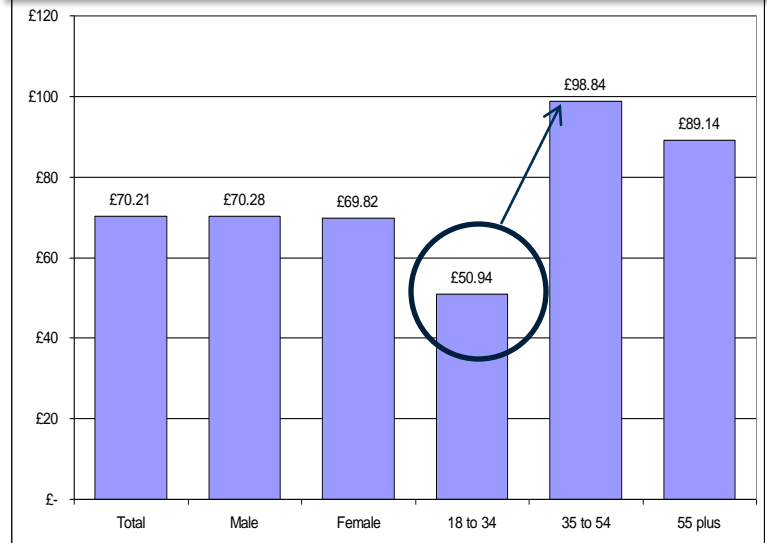
# About our customers

- Extends William Hill into broader customer base
- 54% of online under 34 yrs old
- Male dominated but with a relatively larger female customer base than retail
- Similar spend regardless of gender
- Current generation of 18-34 year olds should increase spend over time

### Customer base by gender



### Customer base by average spend



Source: ResearchCraft, TNS

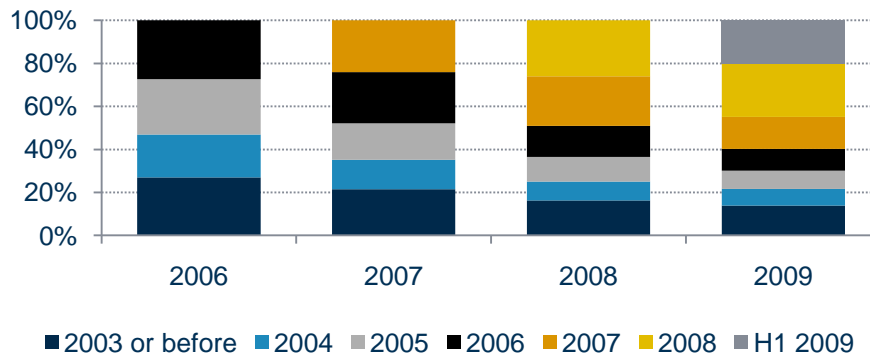
# Our strategy for growth

- Sportsbook
- Casino
- International
- Exploiting our marketing capability

# The importance of Sportsbook

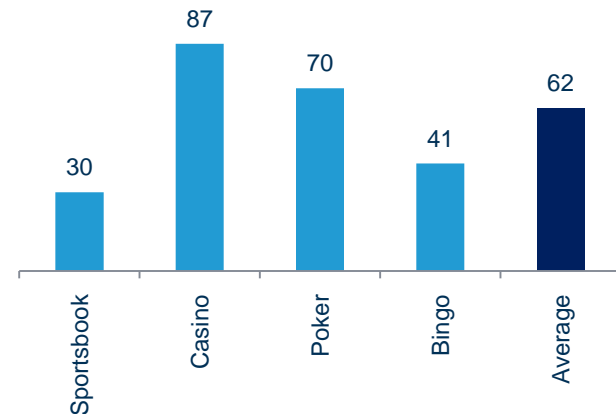
- Sportsbook is the best customer recruitment product
  - Longest average lifetime span
  - Cheaper customer acquisition
  - Best cross-selling potential
- Product differentiation
- Supports brand building
- Ride on the back of popularity of sport and its media profile
- Core William Hill expertise

Ongoing contribution of Sportsbook customers



Source: Company data

CPA by product



Source: Company data

# Sportsbook

## The opportunity

- UK industry-wide pool of dedicated sports punters with multiple accounts
- We have higher share of accounts than share of revenue = huge opportunity

## Two-pronged strategy

- Drive spend of existing/lapsed customers
- Drive acquisition of new and recreational punters and non-UK punters

## 2010 activity

- Product improvement (in-play betting)
- Product development (leapfrog rather than catch-up)
- Mass market awareness of William Hill Online offering (TV advertising, World Cup)
- Increased CRM and VIP management
- International sites / localisation



# Gaming – Casino, Games and Vegas

## Opportunity

- Sportsbook drives traffic (80% of traffic); gaming drives revenue (80% of revenue)

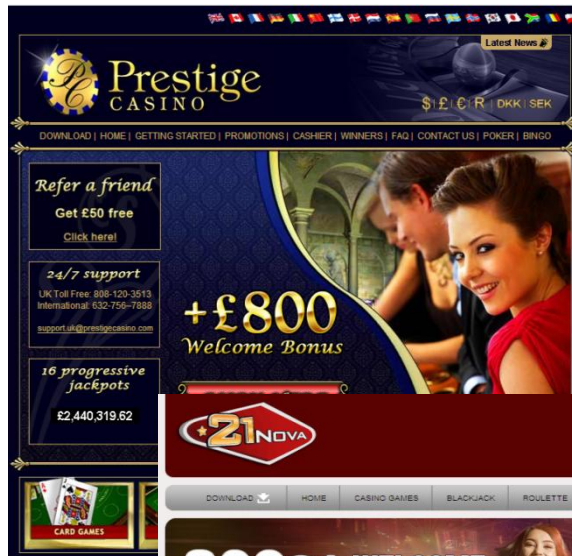
## Multi-brand strategy

- Casino
  - Playtech download casino
  - Short but high-value lifetime
  - Bonus driven customers
  - Cross-sell into other brands
  - Branded games drive volumes and acquisition
- Games and Vegas
  - Easiest way to monetise Sportsbook customers unfamiliar with gaming
  - In-house developed product
  - Cross sell from other products (especially Sportsbook)
  - Branded games drive volumes and acquisition

# Gaming – Casino, Games and Vegas

## 2010 activity

- Branded games
- Improved player management via Playtech back-end
- New bonus engine for Casino and for Games and Vegas



**Prestige CASINO**

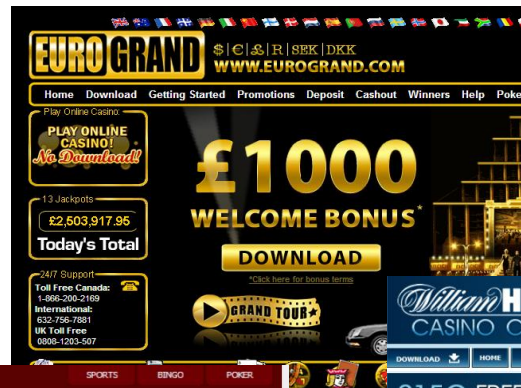
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International: 632-756-7891  
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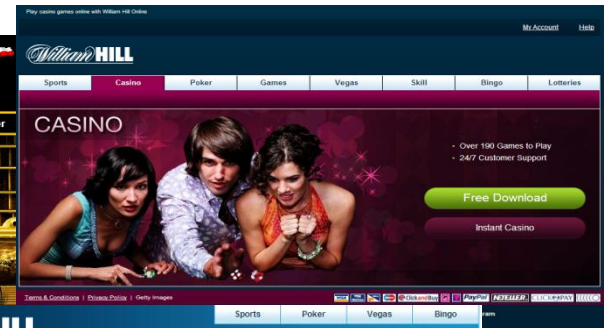
Today's Total

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Language: EN English

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**William HILL CASINO CLUB**

Sports Poker Vegas Bingo

Tuesday, November 24, 2009 Language: EN English

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3 STEPS TO CLAIM BONUS

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2. REGISTER A REAL MONEY ACCOUNT
3. CLICK THE LINK IN THE VERIFICATION EMAIL

FREE DOWNLOAD INSTANT PLAY

Jackpots TODAY'S TOTAL: £2,114,361.09

Refer a friend REFER YOUR FRIEND GET \$50 FREE

Cashier Promotions Winners News

# Gaming – Poker and Bingo

- Poker: difficult market but good cross-sell product
- Bingo: good growth product with different target market
  
- Poker
  - The “acceptable side of gaming” BUT structural issues, unlevel playing field of liquidity
  - Introduction of £ and € tables have stemmed decline
- Bingo
  - Significant progress in performance in 2009
  - Different core demographic (women 40+)
  - Virtue Fusion (williamhill.com) and Playtech software (standalone sites)

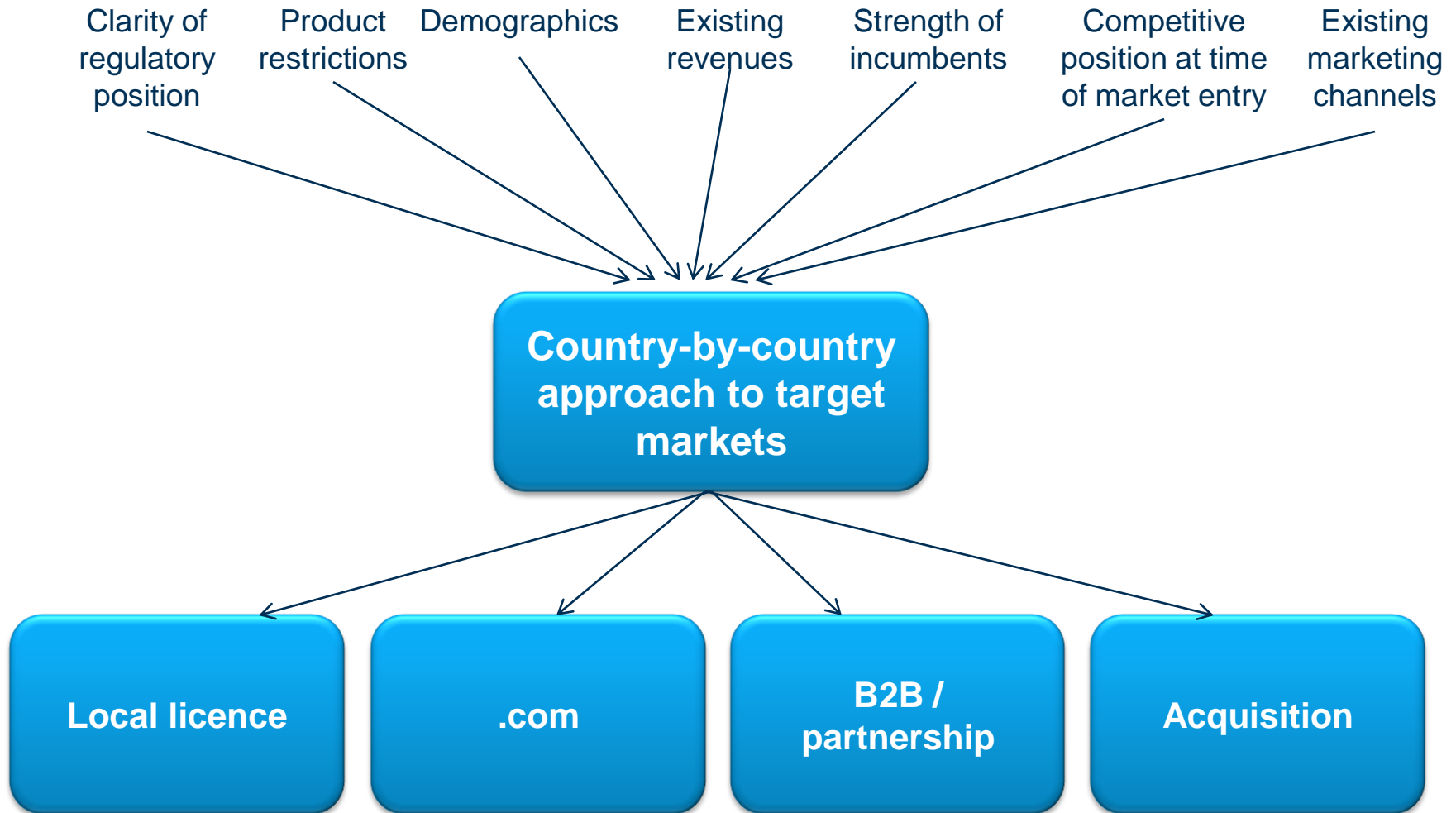
## 2010 activity

- Focus on poker VIP management
- Introduction of branded bingo games
- Bingo bonus engine
- International sites

# Our international framework

- Risk/reward-based portfolio approach
  - Less conservative than historically
  - Preference for regulated markets – greater certainty, better long-term potential
- Country-by-country review process
- In-depth approach for key licensed territories
  - Brand building approach: requires up-front investment
  - Partnership approach: leverages existing partner profile and marketing spend
- Broad-brush approach for nascent markets
  - .com territories, affiliate-driven
  - Build pipeline of new territories where can convert to in-depth approach

# Our international approach: key factors



# International assets and outlook

## Drivers of our success

- Casino and poker product in 15 languages
- Sportsbook in seven languages
- Existing international marketing channels
- Multi-lingual product and marketing teams
- Dedicated non-English language customer service facility
- Global affiliate network
- Existing marketing capability reduces investment risk
- Assembly of team with experience of international gaming roll-outs

## Outlook

- Translation of Sportsbook into a further nine languages
- Further localisation of Sportsbook into new languages backed by dedicated marketing
- Offline marketing, brand-building and partnerships in selected territories

## Geographic split of revenues



■ UK ■ Non-UK

# Leveraging our brand and marketing expertise

- Substantial increase in scale
  - Marketing specialists in Israel
  - Multi-national team
- Increased investment and return from online marketing activity
  - Market-leading affiliate network of 70,000 with massive internet reach
  - PPC (pence per click) for prominent search engine positions
  - SEO/“natural” search
  - Performance-based media buys
- Mixed risk/reward approach
  - Affiliate revenue share - low risk, shared reward
  - Returns-driven advertising campaigns
- Leveraging UK brand and 2,300 shop retail network

# Some examples of marketing benefits so far

## Pence per click

- Presence on 98% of all gambling-related search terms on Google
- Estimated 30% share of clicks from all casino- and Sportsbook-related searches - the highest of any operator
- Estimated exposure to 10 million impressions a month of people who search for gambling terms on Google (2008: 500,000 a month)

## Affiliates

- Network of 70,000 affiliates vs previous 7,000 affiliates
- Additional £20m of revenue driven by affiliates



# Industry trends

## B2B

- Sustainable B2B requires continued investment in technology and, for operators, a change in infrastructure and focus
- Few operators are able to provide this effectively or to any scale
- Opportunity for selective partnerships to enter territories
  - Media/telco's with customer databases or consumer distribution
  - Locally recognised brands
  - Navigation of local complexity

## Consolidation

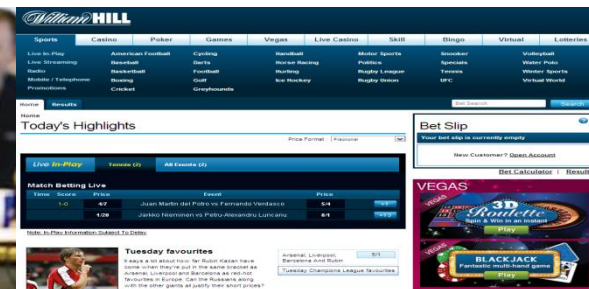
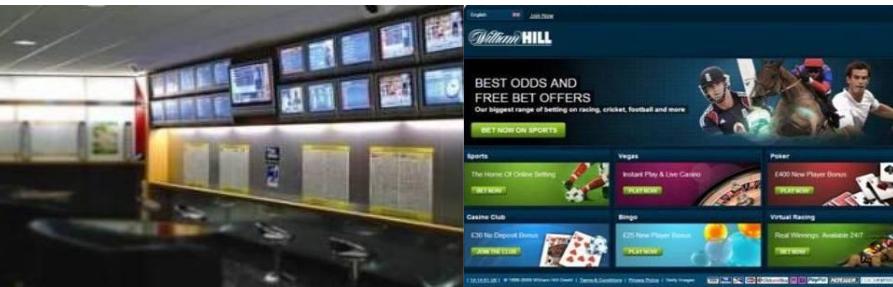
- Rationale for economies of scale and scope exist
- Industry issues persist around legacy and current regulatory issues
- WHO acquisition rationale focused on geographical coverage

## Outlook: why we are well placed

- Strong UK brand yet to be fully exploited
- Strong sports betting expertise and product development pipeline
- Acquired gaming expertise and Playtech platform
- Established marketing expertise
- Untapped European potential

# Today's presentations

1. Strategy
  2. Retail
  3. Industry update
  4. **William Hill Online**
- Ralph Topping, Chief Executive  
Ian Chuter, Group Director of Operations  
David Steele, Corporate Services Director  
Henry Birch, Chief Executive, William Hill Online  
**Jamie Hart, Sportsbook and Trading Director**



# Sportsbook transformation

- In-play: follower to leader
- Internal IP and dedicated R&D
- Unparalleled breadth and depth of product – in all territories
- Rich content
- Mobile development

## In-play: follower to leader

- 2008: manual trading of three or four markets
- 2008-09: external SPIN feed – increased markets but arb issues
- 2009: William Hill trading tool integrated with Openbet
- William Hill creates own algorithms and can bet on any match in the world with or without TV coverage
- Four people per match → eight matches per person.
- Tennis: first stage delivered July 2009
- Football: first stage delivered November 2009

# In-play: follower to leader

Online Sports Betting   **Sports**   Casino   Poker   Skill   Games   Bingo   Help

Live Betting Diary   Mobile Services   One Account   Radio   Results



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 Cricket  
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 Motor Racing  
 Politics  
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- Place bets from as little as 1p online

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**Live Betting Schedule : Betting In Running**

11 March	Chelsea V Tottenham	12:45
11 March	Inter Milan V Ac Milan	14:00
11 March	England V France	15:00

[View All Live Betting](#)

**Live Betting : Live Betting Console**

- Launch Live Betting Console

**Live : View All Live Betting**

[Celtic V Rangers](#)   [Related Bets](#)

<input type="checkbox"/> 1.80 Home	<input type="checkbox"/> 3.10 Draw	<input type="checkbox"/> 4.00 Away
------------------------------------	------------------------------------	------------------------------------

[Az Alkmaar V Feyenoord](#)

<input type="checkbox"/> 1.80 Home	<input type="checkbox"/> 2.75 Draw	<input type="checkbox"/> 4.80 Away
------------------------------------	------------------------------------	------------------------------------

[View Rules](#)  

**Bet Now :**

[View Next 3 Greyhounds](#)   [12-42 Hove](#)

[View Next 3 Horse Races](#)   [1-00 Dortmund](#)

[View All Imminent Matches](#)

**Football Home**   Daily Match List   Coupons   All Competitions   Team A-Z   Specials

Home > Football > All Competitions > Australian A-League > North Queensland Fury v Central Coast

## North Queensland Fury v Central Coast - All Markets

Price Format : Fractional

**Live In-Play**

North Queensland Fury vs Central Coast  
1st Half 32:11

North Queensland Fury **0 - 1** Central Coast

Goal scored by Central Coast (21:28)

Total					
North Queensland Fury	0	0	0	0	0
Central Coast	1	0	0	0	0

**Match Betting Live**

Event	Home	Draw	Away
North Queensland Fury v Central Coast	9/2	13/5	1/2

**Over/Under 1.5 Goals**

Event	Under	Total	Over
North Queensland Fury v Central Coast	4/1	1.5	1/7

**Over/Under 2.5 Goals**

Event	Under	Total	Over
North Queensland Fury v Central Coast	8/11	2.5	EVS

# In-play: follower to leader

All **Matches**

Home > Cricket > One Day Internationals > South Africa v England - 2nd ODI

## South Africa v England - 2nd ODI - All Markets

Price Format: Fractional

**Live In-Play**

One Day International

1st

South Africa 138/4 (80)

England - 2nd ODI - (1)

Over Completed

Player	Current Runs
R McLaren	1
A Petersen	18

**Match Betting Live**

Price	Event	Price
8/11	South Africa vs England	EVS

**South Africa 32nd Over Runs**

Event	Under	Total	Over
South Africa v England - 2nd ODI	17/20	261.5	17/20

**South Africa Total Runs**

Event	Under	Total	Over
South Africa v England - 2nd ODI	17/20	43.5	17/20

**A Petersen Total Runs**

Event	Under	Total	Over
South Africa v England - 2nd ODI	17/20	24.5	17/20

**R McLaren Total Runs**

Event	Under	Total	Over
South Africa v England - 2nd ODI	17/20	24.5	17/20

**South Africa Total Runs 320-330**

Selection	Price
Under 320	1/50
Over 330	10/1

**South Africa Total Runs 310-320**

**South Africa Total Runs 300-310**

**South Africa Total Runs 290-300**

**South Africa Total Runs 280-290**

**AN Petersen To Score 50+**

**R McLaren To Score 50+**

**A Petersen Runs 3-Way**

**R McLaren Runs 3-Way**

**South Africa Next Man Out**

**South Africa Next Dismissal Method**

**South Africa Next Wicket Method**

**Highest Opening Partnership Live**

**South Africa Total Runs Odd/Even**

**Top England Batsman**

**Top South Africa Bowler**

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All **Matches** **Coupons**

Home > Tennis > Barclays ATP World Tour Finals > Rafael Nadal v Robin Soderling

## Rafael Nadal v Robin Soderling - All Markets

Price Format: Fractional

**Live In-Play**

Barclays ATP World Tour Finals

1st

Rafael Nadal 16 0

Robin Soderling 30 1

Rafael Nadal hits Double Fault

Total	Price
Rafael Nadal	0 0 1
Robin Soderling	1 0 0

**Match Betting Live**

Price	Event	Price
10/11	Rafael Nadal vs Robin Soderling	10/11

**1st Set - Game 3**

Price	Event	Price
10/3	Rafael Nadal vs Robin Soderling	1/5

**1st Set - Game 4**

Price	Event	Price
1/8	Rafael Nadal vs Robin Soderling	7/2

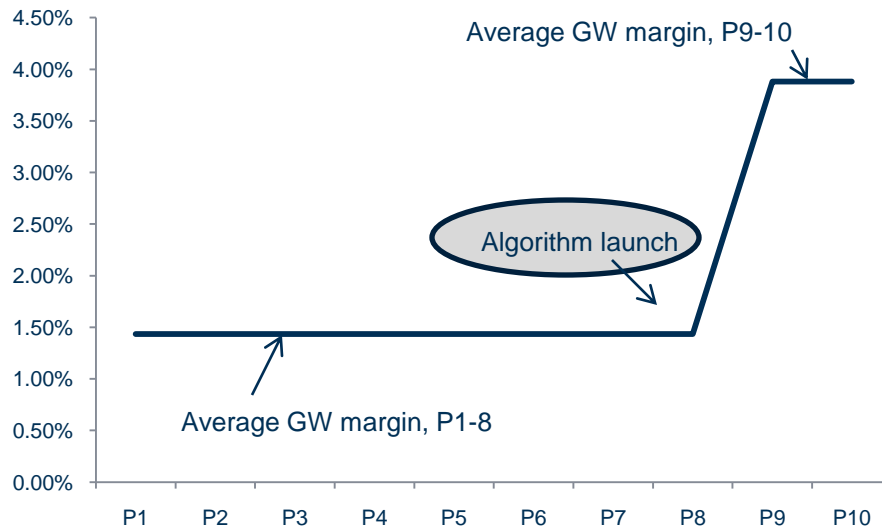
**1st Set Betting Live**

Cricket – over 20 in-play markets  
Tennis – over 30 in-play markets

# Internal IP and dedicated Trading R&D

- Algorithms based on statistics and times – supremacy ratings and event expectations
- Pre-match and in-play
- Quicker prices, more events, more markets and bet types, and better margins
- Tennis was launched July 2009, football November 2009
  - Next phase of tennis and football will be launched in Q1 2010
- Eight further sports to be launched during 2010

**In-play Tennis GW margin, P1-10 2009**





# Unparalleled breadth and depth of product

## English Premier League

Date	Match	Home	Draw	Away	
21 Nov 09 - 12:45	Liverpool v Man City	4/5	5/2	7/2	+ 178
21 Nov 09 - 15:00	Birmingham v Fulham	6/4	21/10	19/10	+ 178
21 Nov 09 - 15:00	Burnley v Aston Villa	23/10	11/5	5/4	+ 178
21 Nov 09 - 15:00	Chelsea v Wolves	1/6	11/2	20/1	+ 178
21 Nov 09 - 15:00	Hull v West Ham	15/8	9/4	7/5	+ 178
21 Nov 09 - 15:00	Sunderland v Arsenal	9/2	5/2	4/6	+ 178
21 Nov 09 - 17:30	Man Utd v Everton	2/5	16/5	8/1	+ 178
22 Nov 09 - 13:30	Bolton v Blackburn	13/10	11/5	11/5	+ 178
22 Nov 09 - 15:00	Tottenham v Wigan	1/2	3/1	6/1	+ 178
22 Nov 09 - 16:00	Stoke v Portsmouth	21/20	23/10	13/5	+ 178

## English Championship

Date	Match	Home	Draw	Away	
21 Nov 09 - 15:00	Barnsley v Cardiff	11/5	23/10	5/4	+ 62
21 Nov 09 - 15:00	Coventry v Crystal Palace	9/5	23/10	6/4	+ 62
21 Nov 09 - 15:00	Doncaster v QPR	15/8	12/5	7/5	+ 62
21 Nov 09 - 15:00	Leicester v Plymouth	7/10	12/5	9/2	+ 62
21 Nov 09 - 15:00	Middlesbrough v Nottingham Forest	10/11	9/4	10/3	+ 62

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# Unparalleled breadth and depth of product

21 Nov 09 - 15:00	Notts County v Aldershot	4/7	13/5	11/2	 + 51
21 Nov 09 - 15:00	Shrewsbury v Bury	6/4	23/10	9/5	 + 51
21 Nov 09 - 15:00	Torquay v Rotherham	19/10	23/10	7/5	 + 51

## English Blue Square Premier

Date	Match	Home	Draw	Away	
21 Nov 09 - 15:00	AFC Wimbledon v York	13/10	11/5	13/8	 + 45
21 Nov 09 - 15:00	Chester v Altrincham	7/5	21/10	8/5	 + 45
21 Nov 09 - 15:00	Ebbsfleet United v Tamworth	9/5	11/5	6/5	 + 45
21 Nov 09 - 15:00	Forest Green v Stevenage	3/1	12/5	8/11	 + 45
21 Nov 09 - 15:00	Gateshead v Grays	8/11	12/5	3/1	 + 45
21 Nov 09 - 15:00	Hayes And Yeading v Crawley	13/10	11/5	13/8	 + 45
21 Nov 09 - 15:00	Histon v Wrexham	23/20	11/5	19/10	 + 45
21 Nov 09 - 15:00	Kettering v Kidderminster	5/6	23/10	13/5	 + 45
21 Nov 09 - 15:00	Luton v Cambridge Utd	8/11	23/10	16/5	 + 45
21 Nov 09 - 15:00	Mansfield v Eastbourne	4/11	3/1	6/1	 + 45
21 Nov 09 - 15:00	Oxford v Barrow	3/10	10/3	7/1	 + 45
21 Nov 09 - 15:00	Salisbury v Rushden	7/4	9/4	6/5	 + 45

## Scottish Premier League

In all leagues

# Unparalleled breadth and depth of product

Thursday, 19 November 2009 offering for weekend fixtures – pre-match markets

League	William Hill	Ladbrokes	Bet365	SkyBet	PaddyPower	Stan James	Bwin	SportingBet
Premiership	179	22	29	46	67	22	20	47
Championship	179	11	29	41	59	21	9	42
League 1	52	8	29	37	43	11	9	33
League 2	52	8	29	37	43	11	9	33
BlueSquare	46	6	23	25	43	8	5	16
SPL	179	12	24	36	59	24	9	41
Scottish Div 1	43	5	7	2	4	8	4	16
Scottish Div 2	43	5	7	2	4	9	4	16
Scottish Div 3	43	5	7	2		9	4	16
La Liga	104	16	25	39	43	20	16	46
Segunda	43	7	18	1	4	4	9	35
Bundesliga	104	8	25	30	43	15	20	41
Bundesliga 2	51	6	19	1	12		17	35
Serie A	183	14	25	37	43	24	47	45
Serie B	43	5	22	1			9	34
Ligue 1	62	7	22	30	43	19	44	45
Eredivisie	46		19	1	12	17	14	43
Austrian	12	7	19	1	4	15	10	36
Belgian Jupiler	12		19	1	4	19	9	35
Turkish	46	7	18	1	4	13	14	39
Danish	12		23	1		11	14	37
Greek	51	6	19	1	2	11	19	40
Greek 2	12		9			10	1	29
A League	11	6	21			15	12	37
MLS	56	7	21	1	4	9	9	42

# Unparalleled breadth and depth of product

all sports...

NFL

Price Format: Fractional

### Upcoming Markets

Date	Price	Match	Price
24 Nov 09 - 01:35	9/5	Tennessee Titans @ Houston Texans	5/11

Home > Basketball > NBA > Milwaukee Bucks @ San Antonio Spurs

### Milwaukee Bucks @ San Antonio Spurs - All Markets

Bet until: 24 Nov 09 - 01:35 Price Format: Fractional

- Money Line
- Spread
- Winning Margin
- Points Markets Collapse ▲
  - Total Points
  - Away Total Points
  - Home Total Points
  - Alternative Total Points
  - Alternative Away Total Points
  - Alternative Home Total Points
  - Race to 20 Points
  - Race to 30 Points
  - Race to 40 Points
  - Race to 50 Points
  - Odd/Even Total Points
  - Odd/Even 1st Half Points
  - Odd/Even 1st Quarter Points
  - Odd/Even Home Points
  - Odd/Even Away Points

Home > Cricket > Test Matches > India v Sri Lanka - 2nd Test Match

### India v Sri Lanka - 2nd Test Match - All Markets

Bet until: 24 Nov 09 - 04:00 Price Format: Fractional

- Match Betting
  - Top Home batsman
  - Top Away batsman
- Player Markets Collapse ▲
  - Top Home Bowler
  - Top Away Bowler
  - Tendulkar v Gambhir - Batsmen Match
  - Sehwag v Dravid - Batsmen Match
  - Jayawardene v Sangakkara - Batsmen Match
  - Dilshan v Samaraweera - Batsmen Match
  - Zaheer v Sharma - Bowler Match
  - Muralitharan v Mendis - Bowler Match
- Other Markets Collapse ▲
  - Double Chance
  - Draw No Bet
  - 1st Innings Lead
  - Team of Top batsman
  - Fall of 1st Home Wicket

Margin on our additional pre-match markets has been over 10% since launch

# Unparalleled breadth and depth of product

Αρχική Σελίδα > Ποδοσφαιρο > Όλες οι Διοργανώσεις > Ελλάδα Β Εθνική > Πανσερραϊκός - Εθνικός Πειραιώς

## Πανσερραϊκός - Εθνικός Πειραιώς - Όλες οι αγορές

Τύπος Αποδόσεων: Δεκαδικά

**Live In-Play** Panserraikos vs Ethnikos Piraeus  
2ο ημίχρονο 65:16

Panserraikos **0 - 0** Ethnikos Piraeus

Κόρνερ Πανσερραϊκός (54:19)

Σύνολο	+	-	+	-
Panserraikos	0	0	5	0
Ethnikos Piraeus	0	0	1	1

**Τελικό Αποτέλεσμα - Ζωντανά**

Γεγονός	1	X	2
Πανσερραϊκός - Εθνικός Πειραιώς	2.60	1.85	5.80

**Σύνολο Γκολ Over/Under 2,5 - Ζωντανά**

Γεγονός	Under	Σύνολο	Over
Πανσερραϊκός - Εθνικός Πειραιώς	1.04	2.5	10.00

**Αποτέλεσμα δευτέρου ημιχρόνου - Ζωντανά**

Γεγονός	1	X	2
Πανσερραϊκός - Εθνικός Πειραιώς	2.60	1.80	5.50

**Δίχως Ισοπαλία - Ζωντανά**

Επιλογή	Τιμή
Πανσερραϊκός	1.33

**Δελτίο στοιχήματος**

Το δελτίο στοιχήματος είναι άδειο

Νέος Πελάτης: [Δημιουργία Λογαριασμού](#)

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Βρείτε εδώ, εύκολα και


...and all territories

# Available 24/7

Home > Virtual World

Virtual Price Format: Fractional

Horses 1:45 | Greyhounds 0:45 | Motor Racing



**11:32 Broadside Alley** (Speedway - 14 Odds Place 1,2)

Selections	Price	Selections	Price
Dean Greco	15/8	Joe Ward	9/4
Ross Cooke	2/1	Dietrich Braess	6/1

1st 1 | 2nd 4 | 3rd 3

**UPDATE MARKETS**

**Features**

- Watch every race live
- 24/7 Betting Action
- Races every 3 min

Forecasts / Tricasts ▶  
 E/W Rules ▶  
 More Details ▶  
 Results ▶

**Bet Slip**

Your bet slip is currently empty

Click on a price to add a selection

[Bet Calculator](#) | [Results](#)

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# Rich content

Higher LTV for users of additional content and cross-sport and cross product players

- Dedicated news site for SEO and customer comms
- Established online radio service
- Trackside racing live updates – online and by i-phone
- Racing, football and other sport podcasts with big name contributors
- Racing Post form – subscription free
- Livescore service with integrated betting
- Opta football data

# Rich content - racing

William Hill Online Sports Betting - Live Football, Horse Racing, Greyhounds, Sports & Games

English

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Sports | Casino | Poker | Games | Vegas | Live Casino | Skill | Bingo | Virtual | Lotteries

My News | Football | Horse Racing | Tennis | Golf | Cricket | Radio

### Radio

**Sunday's Racing Podcast**  
Sam Turner, Niall Hannity and Declan O'Donoghue preview Sunday's racing. Aintree is the feature.  
[Read More](#)

Dave Keeler 21st Nov 2009 - 14:19

**Recent articles**

**The William Hill Sporting Icons survey**  
12th Nov 2009

**The SPL: Weekend football podcast**  
20th Nov 2009

**John Gwynne's Grand Slam of Darts: 20th November**  
20th Nov 2009

**Saturday's Racing Podcast**  
20th Nov 2009

**The League: Weekend football podcast**  
20th Nov 2009

**Buncey's Boxing Podcast**  
20th Nov 2009

### Live Radio Schedule

Ross Brierty, Niall Hannity and Gary Capewell are your team on Sunday. It's Buckle Up Chase Day at Aintree and we're live from 11.55am

**On Air**

**HorsesLive**

### Trackside Live

Pertachy lands the Wolves and Bahamian Kid place finish. Ross Brierty is your team on Sunday. It's Buckle Up Chase Day. Niall Hannity, Capewell will be shouting from 11.55am

Lucy Rhodes - 21:19

We've made it! I don't know how. What are you last? Once upon a time it was next up at 4s. A between the fav and 7/1.

Lucy Rhodes - 21:09

Yet ANOTHER winner for first-time blinkered Desse penultimate Poly contest: false second spot and 4

Meetings | **Horse A-Z** | Jockey/Trainer | Antepost Races | Virtual | Special Markets | tote

Home > Horse Racing > Southwell > 3:30 Southwell

**3:30 Southwell** Going - Standard / Distance - 0m 6f

Price Format: Fractional

**Racing Post Verdict**

**RACING POST 3:30 Southwell**

Complete form

William Hill TV

**On Air**

WHRadio

A fascinating event with several who could go on to better things on this surface. Preference is for ELUSIVE HAWK, though if Eric Alston can get Great Charm back on track he'd be interesting off a lenient mark. [Emily Weber]

No.	Silks	Selection	RP Rating	Price	SP
1		<b>Elusive Hawk</b> O'Dwyer, J M/Curley, B Form: 226310 Age: 5 Weight: 9-4 Spotlight	93	4/1	SP
11		<b>Naomh Geilleis</b> Fanning, J/Johnston, M Form: 574861 Age: 4 Weight: 8-7 Spotlight	96	9/2	SP
2		<b>Great Charm</b> Kelly, S W/Alston, E Form: 000033 Age: 4 Weight: 9-1 Spotlight	92	11/2	SP
4		<b>Rio Cobolo</b> Cattin, C/Green, P Form: 410052 Age: 3 Weight: 9-1 Spotlight	92	6/1	SP
6		<b>Premier Lad</b> Makin, P/Barron, T Form: 43-1248 Age: 3 Weight: 9-0 Spotlight	94	8/1	SP
3		<b>Mozayada</b> Winston, R/Brittain, M Form: 108805 Age: 5 Weight: 9-1 Spotlight	90	14/1	SP
5		<b>Dig Deep</b> Hanagan, P/Quinn, J Form: 771085 Age: 7 Weight: 9-1 Spotlight	90	14/1	SP

### Bet Slip

Your bet slip is currently empty

**Bet Calculator** | **Results**

**WHRadio**  
Listen to live radio commentary

### Horse Racing previews & podcasts

Tuesday's Racing Podcast  
23rd Nov 2009 - 16:08

The William Hill Radio Naps Table  
23rd Nov 2009 - 15:49

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# Rich content - football

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**£70 of free bets for everyone on the weekend's sports betting action**

If you're betting on Saturday's seven live horse races on Channel 4 then take advantage of our Free Bets for Everyone offer and enjoy free bets on some of the biggest sporting events of the weekend. This offer is open to every William Hill account holder, new or ex...

**FREE BETS FOR EVERYONE**

**Live Radio Schedule**

Join Ross Brierley, Andy Holding and Steven Powell from 11.50am for SIX LIVE meetings

On Air William Hill News plus free bet offers and

HorsesLive DogsLive

**Football**

Recent: Expect a battle at the Reebok (21st Nov 2009 - 11:07)

Featured: Everton unlikely to break Old

Popular: Ireland lose out but not our customers

**William HILL** **Football Stats**

England Premier League

League Table Fixtures Results Top Scorers Defence & Attack Cards Shown Referees

**Head 2 Head : v Man. City**

**Last 6 matches**

Team	Score	Opponent	Date
Liverpool	1 - 1	Man. City	22/02/2009
Man. City	2 - 3	Liverpool	05/10/2008
Liverpool	1 - 0	Man. City	04/05/2008
Man. City	0 - 0	Liverpool	30/12/2007
Man. City	0 - 0	Liverpool	14/04/2007
Liverpool	1 - 0	Man. City	25/11/2006

**Average Statistics 2009 - 2010**

	Home	Away
Goals scored	3.2	1.3
Goals conceded	1	1
Time first goal scored	32 mins	33 mins
Time first goal conceded	29 mins	21 mins
Yellow cards	1.3	1.7
Red cards	0.2	0.2
Subs used	2.7	1.8
Biggest victory	6-1	2-0
Biggest defeat	3-1	4-3

**William HILL** **opta sportsdata** **pitchside live**

Man menu

**LIVE** **FIXTURES AND RESULTS** **TABLES**

**Ticker**

Hull City vs West Ham United

HOME **3-3** AWAY

90. + 5. min

View by: **REFRESH** Text: AAA

90. + 5. min Second Half ends, Hull City 3, West Ham United 3.

90. + 4. min Attempt blocked. Geovanni (Hull City) right footed shot from outside the box is blocked.

90. + 3. min Luis Jimenez (West Ham United) is shown the yellow card for a bad foul.

90. + 3. min West Ham United, 18 fouls.

90. + 3. min West Ham United, 3 attempts in the last 11 mins.

**Live League Tables and Scores**

Liverpool - Man City	2-2 (0-0)
Birm'ham - Fulham	1-0 (1-0)
Burnley - Villa	1-1 (1-0)
Chelsea - Wolves	4-0 (3-0)
<b>Hull - West Ham</b>	<b>3-3 (3-2)</b>
Sunderland - Arsenal	1-0 (0-0)
Man Utd - Everton	3-0 (1-0)
Bolton - Blackburn	Sun 13.30
Spurs - Wigan	Sun 15.00
Stoke - Portsmouth	Sun 16.00

**William HILL** **opta sportsdata** **LiveScores & Results**

American Football Baseball Basketball Cricket Darts Football Golf Ice Hockey Rugby League Rugby Union Snooker Tennis

View all of today's fixtures

Select Date: Sun 22 Nov 09

**English Barclays Premier League** Bet Now

FT Bolton Wanderers 0 - 2 Blackburn Rovers Details

FT Tottenham Hotspur 9 - 1 Wigan Athletic Details

55' Stoke City 0 - 0 Portsmouth Hide Details

**INTERNATIONAL**

45' Whitehead Brown 35'

**UEFA Champions League**

**UEFA Europa League**

**Internationals**

Stoke City Draw Portsmouth

World Cup QFs - European 21/20

World Cup QFs - S.American 11/4

World Cup QFs - Concacaf

World Cup Play Off S.America/ Concacaf

World Cup QFs - African

World Cup QFs - Asian

World Cup QFs - Oceania

**Scottish Premier League** Bet Now

FT Dundee United 2 - 1 Celtic Details

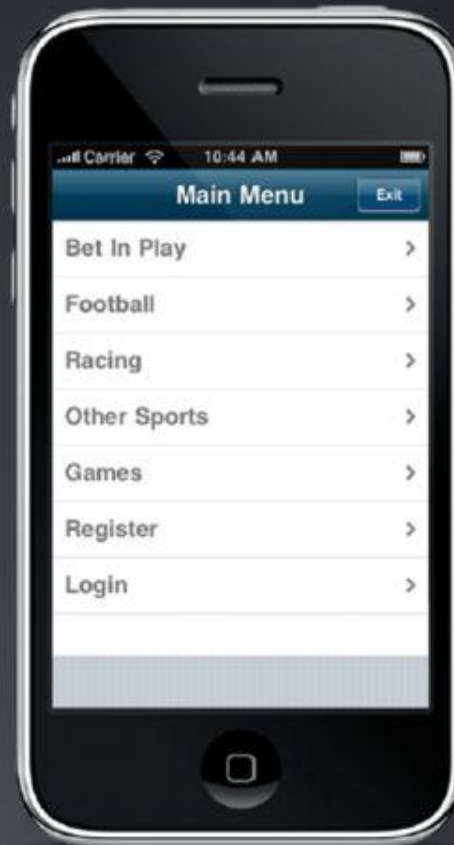
**Scottish Challenge Cup** Bet Now

FT Dundee 3 - 2 Inverness Caledonian Thistle Details

Watch live sport on your PC for free

Bet Now

# Mobile development



**“In 2014, the volume of mobile data sent and received every month by users around the world will exceed by a significant amount the total data traffic for all of 2008”**

ABI research

Mobile demands close focus at this point in its development as the emerging dominant e-commerce channel

- Dedicated team
- Mfuse improvements
- Smartphone website
- Smartphone apps
- Text betting

The shift from office and home to mobile computing is underway.

# Sportsbook 2010

- In-play: follower to leader
- Unparalleled breadth and depth of product – in all territories
- Enhanced content – on and off site
- Mobile development
- Personalisation
- Unique functionality

Questions?