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**Chairman, EPMA**

EPMA – 4th Racing & Betting Business Forum

Paris - September 30th, 2011

# Agenda

- Racing authorities/Pari Mutuel operators: Still running the same race?
- Panel Discussion: Key factors for a successful international Racing betting event
- How to address new generation?

**PMU**  
#2 worldwide for horse betting

Gobal operator for online gaming

Horse betting  
retail network

**Horse  
racing**

**Sports**

**Poker**

**Horse racing**

PMU.fr = #1 betting web site

11 000 outlets



# PMU strategy to face the opening of the french market

- Achieve growth for horse racing betting
- Increase market share in sports betting
- Launch poker as a supplementary offer
- Maintain the growth of the retail network
- Improve IT & Opérations
- Develop international activities



# Online market overview – First half 2011

- Horse racing betting – 496 M€
- Sports betting – 293 M€
- Poker – 4 324 M€
- Quick consolidation on 4 to 5 operators on each market



## Turnover & GGR – First half 2011

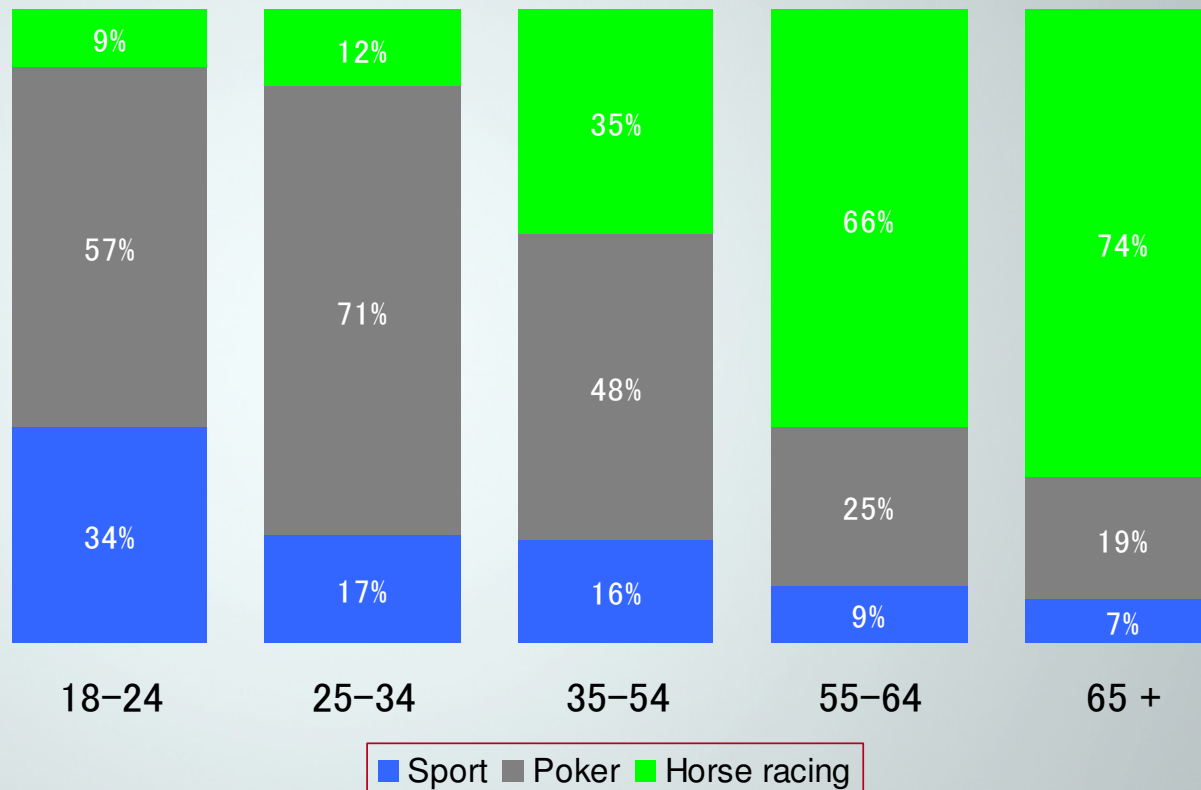
<i>Millions euros</i>	<i>2011</i>	<i>%</i>
Total turnover (bets)	5 095	+ 8,1
Internet turnover (bets)	639	+ 63,9
Horse racing turnover (bets)	4 879	+ 3,4
Total Gross Gaming Revenue	1 240	+ 3,9

YTD 30.06.2011



# Horse racing needs to renew its customer base

## On-line customers activities by age



Source : données Arjel  
2011



(Données arrêtées au 27/03/2011)

# The key factors of success for the future

