



2014 Annual General Meeting

30 October 2014

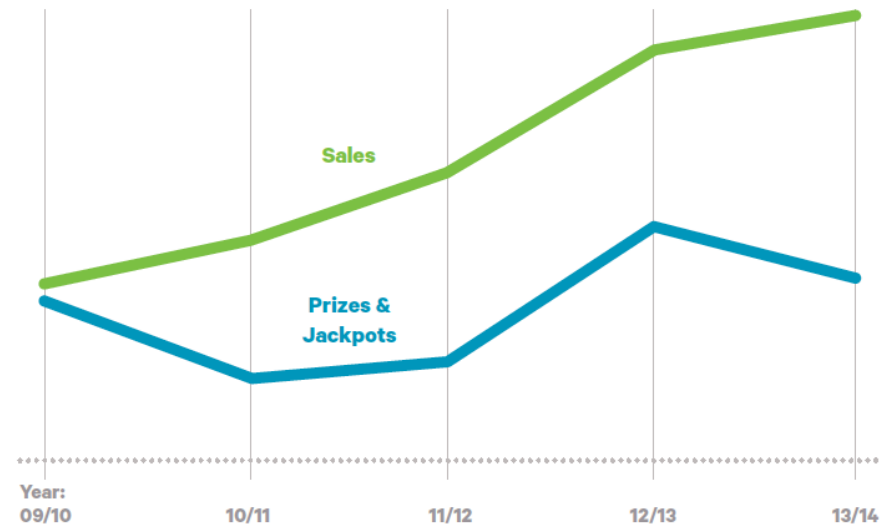


FY 2014 Review

	FY 14	FY 13	
Group TTV (Ticket Sales)	106.2	109.1m	Down 3%
Revenue	24.1	25.2	Down 4%
NPAT	2.8	3.0	Down 7%

	FY 14	FY 13	
Prizes and Jackpots	\$925m	\$1,130m	Down 18%
Customer Accounts	1.72m	1.57m	Up 10%
% purchased on mobile	39%	33%	Up 18%
Social Presence	70,000	18,500	Up 280%

5 Year Sales on www.OzLotteries.com



Continual growth of www.OzLotteries.com over five years despite fluctuating prizes & jackpots

FY 2015 Update

RETURN OF THE JACKPOTS!



POWERBALL
\$70,000,000
TONIGHT

What would you do?

BUY TICKETS →

DRAW CLOSES 7PM AEST
OZLOTTERIES.COM NOT AVAILABLE TO QLD RESIDENTS.
THINK OF THE PEOPLE WHO NEED YOUR SUPPORT. GAMBLING RESPONSIBLY.

OZ LOTTERIES
Bring fun to life!

August 2014



POWERBALL
\$50,000,000
TONIGHT

What would you do?

BUY TICKETS →

DRAW CLOSES 8PM AEST
OZLOTTERIES.COM NOT AVAILABLE TO QLD RESIDENTS.
THINK OF THE PEOPLE WHO NEED YOUR SUPPORT. GAMBLING RESPONSIBLY.

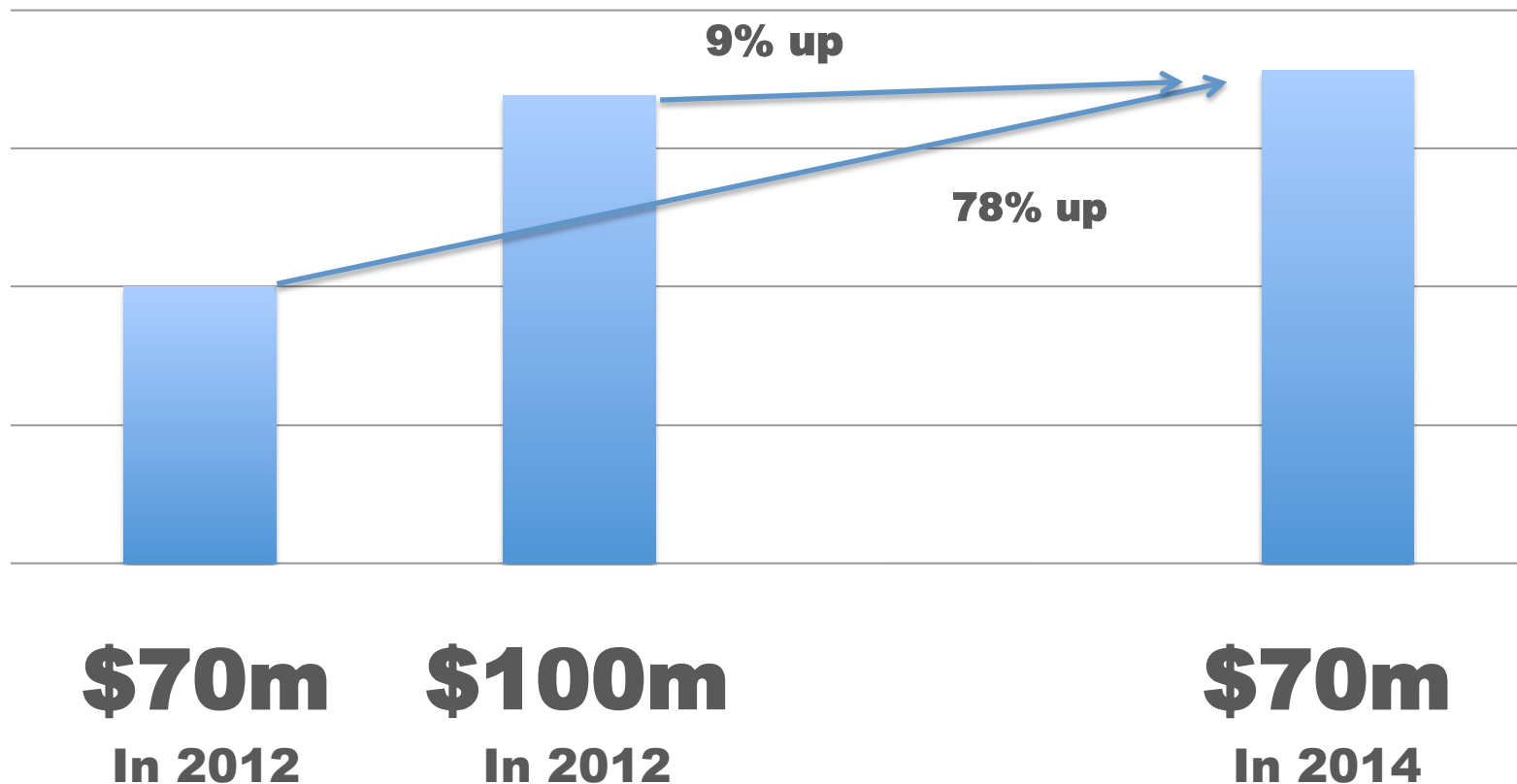
OZ LOTTERIES
Bring fun to life!

October 2014





FY 2015 Update


Daily Sales Comparison




NineMSN Agreement


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OZ LOTTERIES
Bring fun to life!

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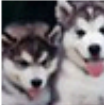




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OzLotteries
✔ Like You like this.

You and 79,432 others like OzLotteries.

 Facebook social plugin

Australia

www.ozlotteries.com



Customer
Accounts
up 10%

Over 12 months to

1.72
million

OzLotteries.com websites visits

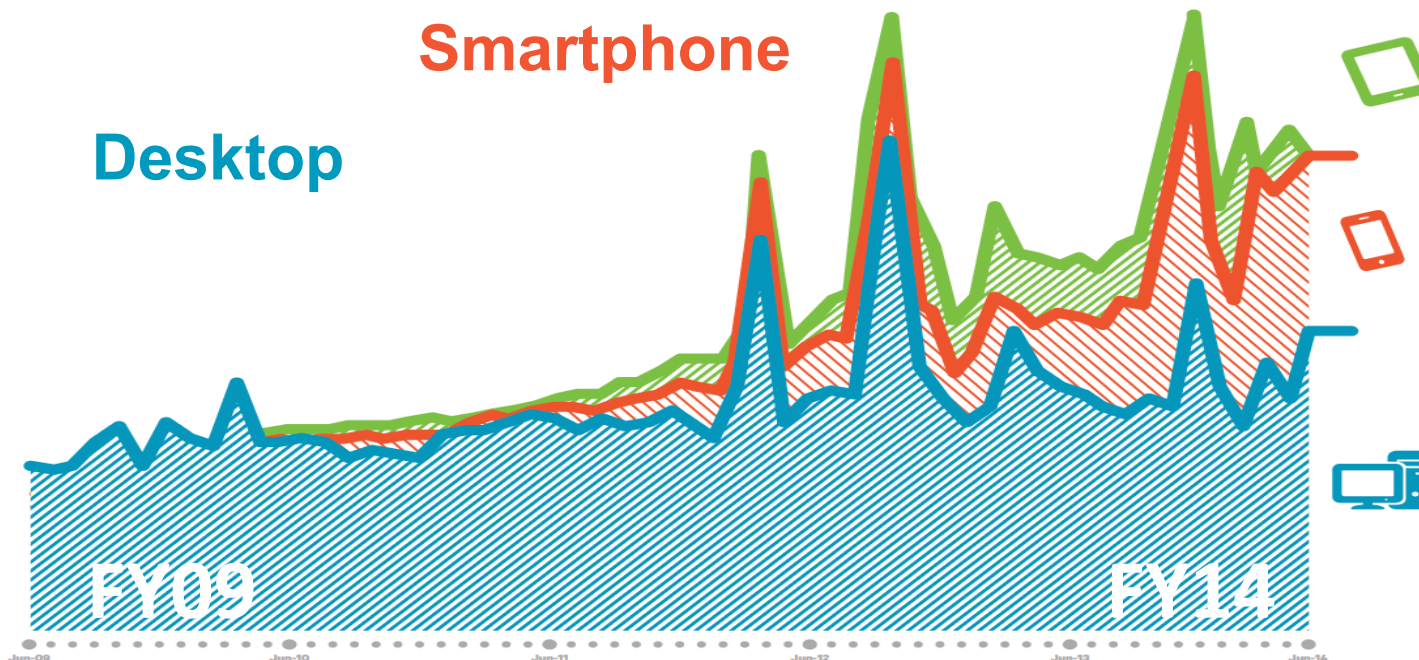
■ Desktop ■ Smartphone ■ Tablet

Smartphones and tablets are gaining mass market appeal, enabling customers to buy online anywhere at any time.

Tablet

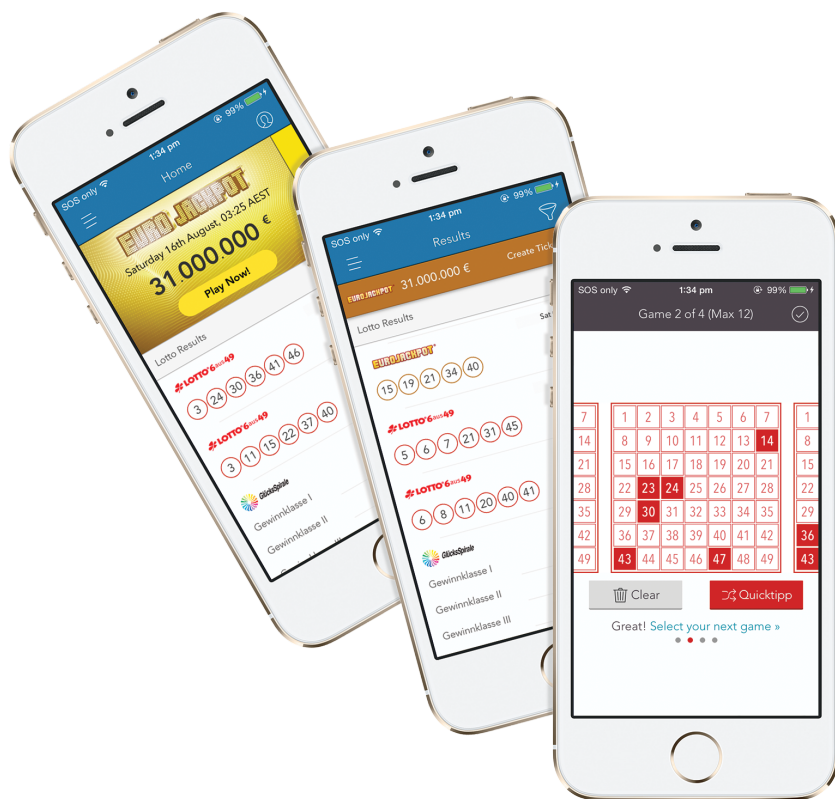
Smartphone

Desktop



Lottery sales going mobile...

2nd generation apps in the market
3rd generation due for release this year
In Australia and Germany

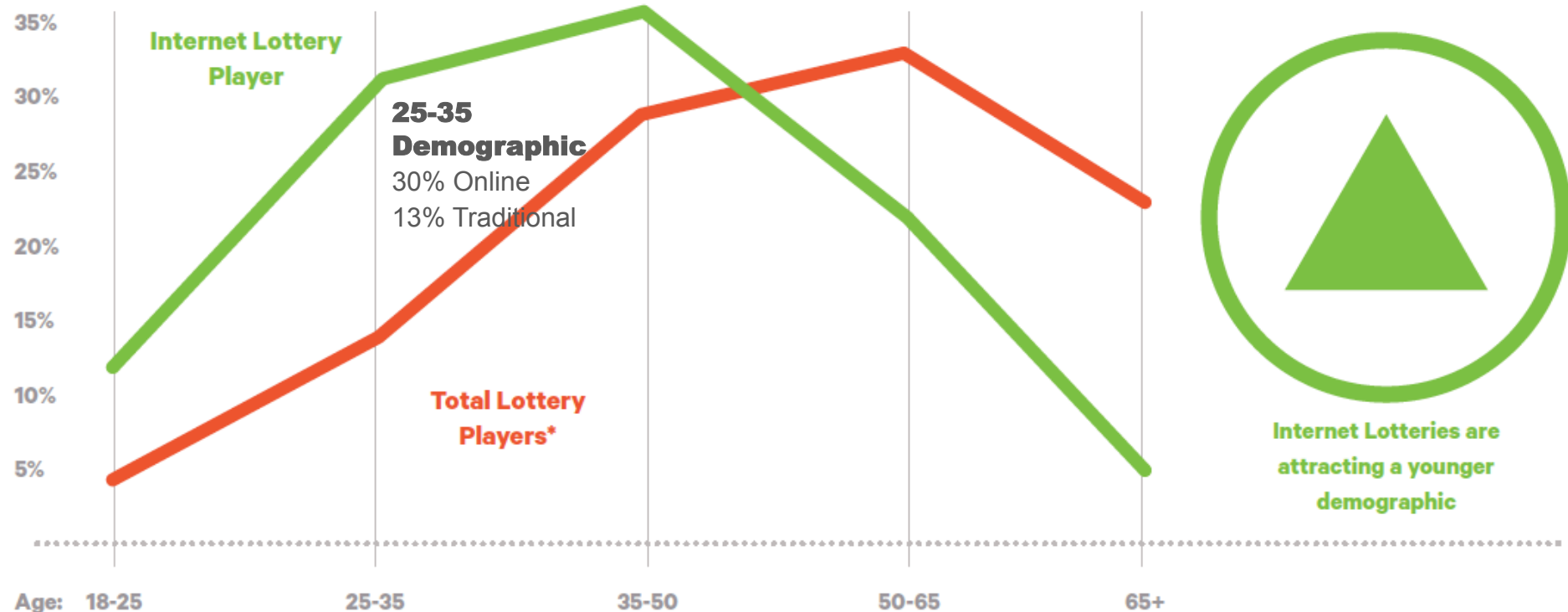


... and getting younger...

Younger Demographics

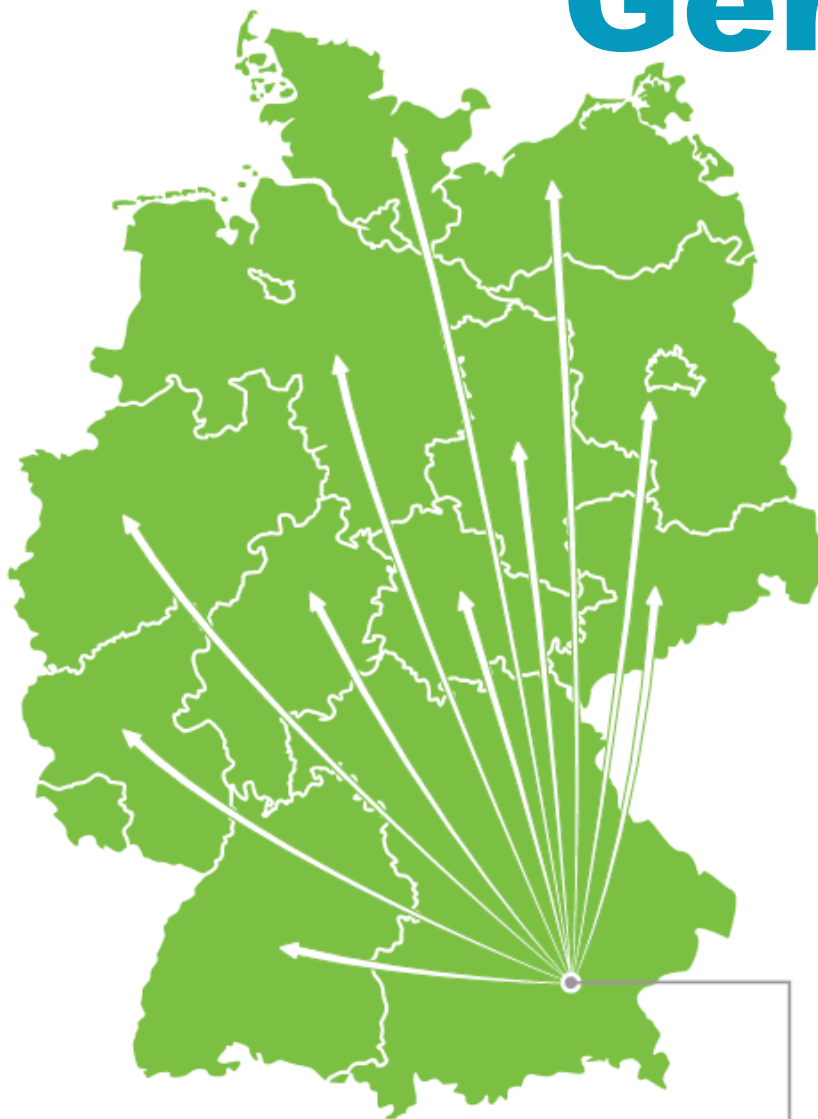
as at 30 June (Australia)

Future of Lotteries is Online



* Source: Roy Morgan Research Single Source Lottery Players Profile Australians 18+ Apr13-Mar14

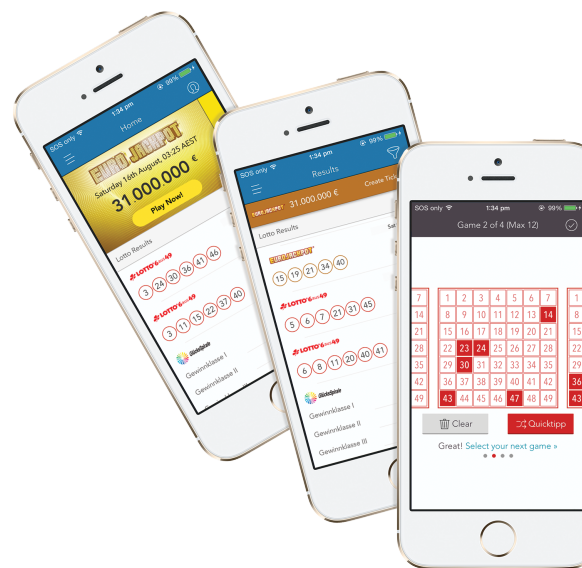
Germany



**Connection to all 16
states in Germany**

**LIVE IN ALL 16 STATES
Completed by June 2014**

Jumbo is the only Company in Germany with a connection to every state via software built in-house.



Germany

Estimated 6.4 million online lottery players by 2020

**Total lottery sales trending upwards
€6.5b in 2012 to €12b in 2020.**

- Driven by Internet sales
- New games – Eurojackpot – (14 countries and 240m people)
- Increased participation rates (Germany lags behind France and the UK)
- Clamp down on unregulated internet sellers



"€8 billion German Lottery market is almost twice the size of the Australian market however internet penetration is less than 1% compared to 9% in Australia"

German Population:

80 million

Source: Deutscher Lotto & Totoblock (DLTB) lotteries, Deutscher Lottverband (DLV), Leibnitz University Hanover

Mexico

Terminated agreements with
Sorteo Games (Partner)

Making progress towards a
relaunch



Mexican Population:

120 million







NASPL 2014
Atlantic City
October 2014



Leadership Team



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