

BCLC Sports



LaFleurs Sportsbetting eConference
June 26, 2018

Agenda

- BC Lottery Corporation
- Sports Betting at BCLC
- Regulations
- Products:
 - Retail
 - Online (& mobile)
- Players
- Competitors
- Future

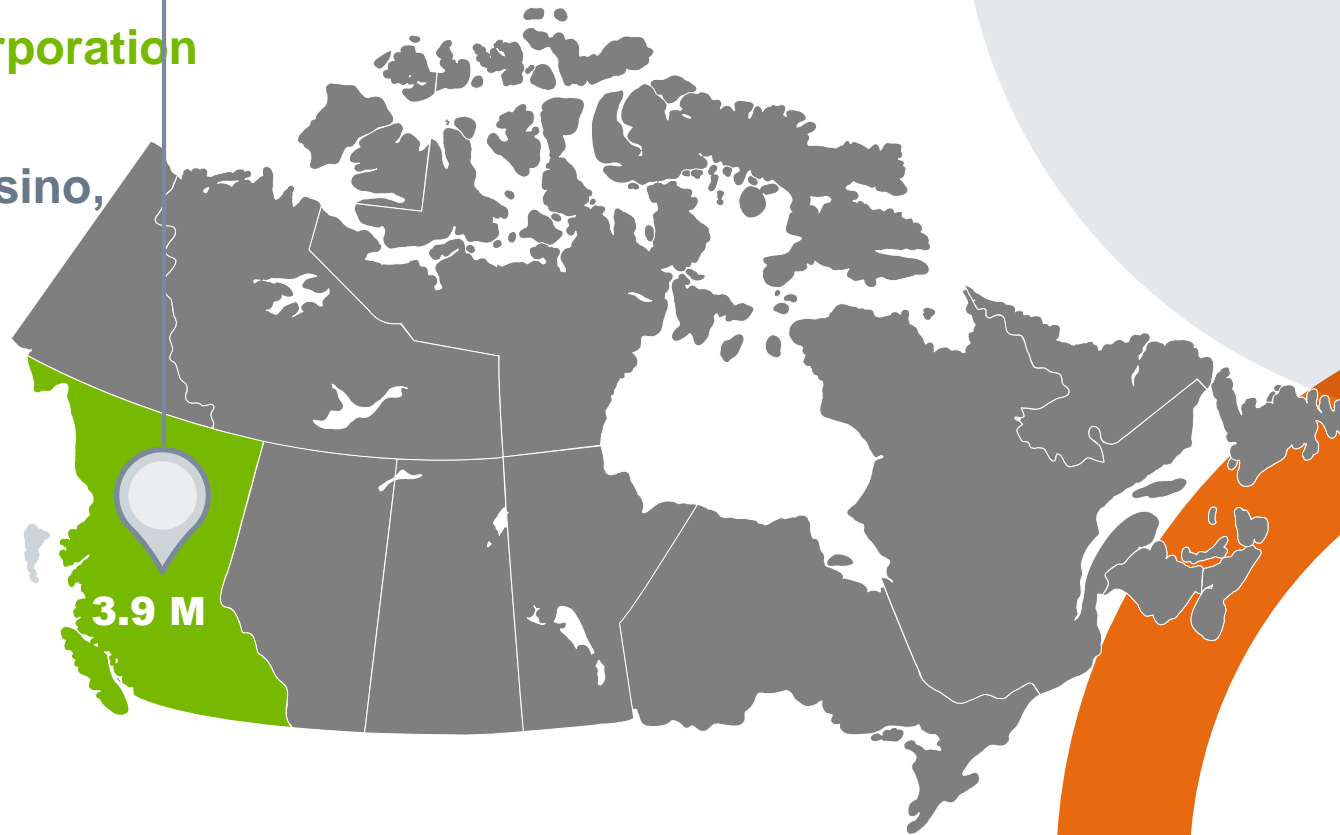


British Columbia Lottery Corporation

Formed: 1985

Responsible for: Lottery, Casino,
Sports (online & retail)

Adult Population (19+): 3.9M



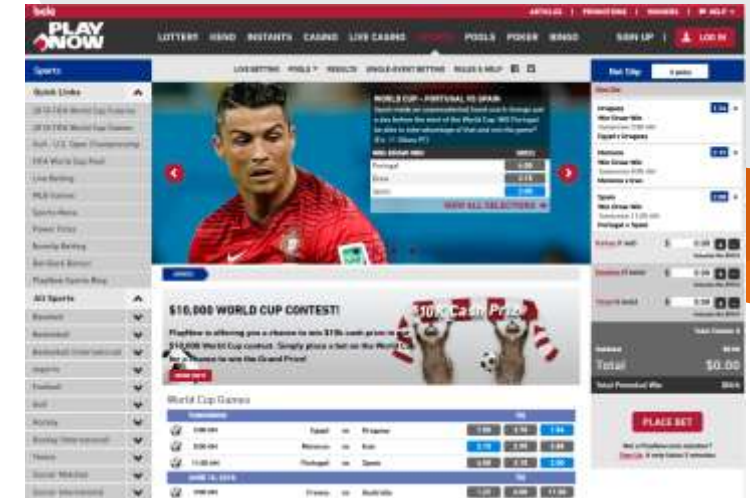
Sports Betting in British Columbia

SPORTS ACTION

MENU 001
WEEK BEGINNING AUGUST 29, 1991

Who Plays

DATE	CUSTOMER TIME	TV	GAME #	SPORT	VISITOR	HOME	GAME #	GET ODDS	1	2
SAT. AUG. 31	10:30 A.M.	TSH	1	HOCKEY	SWEDEN	U.S.A.	1	1.65	4.99	2.10
AUG. 31	9:00 P.M.	CTV	2	HOCKEY	CANADA	FINLAND	2	2.30	5.00	3.50
SUN. SEPT. 1	10:00 A.M.		3	FOOTBALL	PHILADELPHIA	GREEN BAY	3	1.82	4.15	2.20
SEPT. 1	10:00 A.M.		4	FOOTBALL	TAMPA BAY	NEW YORK	4	3.10	3.75	1.95
SEPT. 1	10:00 A.M.	HDC	5	FOOTBALL	SEATTLE	NEW ORLEANS	5	3.15	4.35	1.95
SEPT. 1	10:00 A.M.		6	FOOTBALL	DALLAS	CLEVELAND	6	1.85	4.15	2.15
SEPT. 1	10:00 A.M.	CBC	7	FOOTBALL	ATLANTA	KANSAS CITY	7	3.50	3.65	1.45
SEPT. 1	12:30 P.M.	TGN	8	FOOTBALL	WINNIPEG	SASKATCHEWAN	8	1.90	4.15	2.60
SEPT. 1	1:00 P.M.		9	FOOTBALL	CINCINNATI	DENVER	9	2.15	3.95	1.90
SEPT. 1	1:00 P.M.		10	FOOTBALL	NEW ENGLAND	INDIANAPOLIS	10	3.05	3.90	1.40
SEPT. 1	1:00 P.M.		11	FOOTBALL	SAN DIEGO	PITTSBURGH	11	2.70	4.25	1.95
SEPT. 1	1:00 P.M.		12	FOOTBALL	MIAMI	BUFFALO	12	2.80	4.40	1.90
SEPT. 1	1:00 P.M.		13	FOOTBALL	LOS ANGELES	HOUSTON	13	2.15	3.85	1.90
SEPT. 1	1:00 P.M.	CBS	14	FOOTBALL	MINNESOTA	CHICAGO	14	2.35	3.95	1.75
SEPT. 1	1:00 P.M.		15	FOOTBALL	PHOENIX	LOS ANGELES	15	3.50	4.10	1.90
SEPT. 1	5:00 P.M.		16	FOOTBALL	DETROIT	WASHINGTON	16	2.85	4.30	1.90
MON. SEPT. 2	10:30 A.M.	CBC	17	FOOTBALL	TORONTO	HAMILTON	17	1.35	4.40	4.90
SEPT. 2	1:30 P.M.	CBC	18	FOOTBALL	EDMONTON	CALGARY	18	2.10	4.05	1.90
SEPT. 2	5:00 P.M.	CTV	19	HOCKEY	CANADA	U.S.A.	19	1.50	3.80	2.35
SEPT. 2	8:00 P.M.	ABC	20	FOOTBALL	SAN FRANCISCO	NEW YORK	20	2.10	3.85	2.00
WED. SEPT. 4	7:30 P.M.	CBC	21	FOOTBALL	OTTAWA	BRITISH COLUMBIA	21	2.50	4.10	1.85



1991
Sports Action
@ Retail

2004
Sports Action online (@
PlayNow.com)

2012
PlayNow Sports
online

Regulations

- Federal Criminal Code
 - Parlay Betting
 - Racing & Fighting
- Provincially Regulated (GPEB)



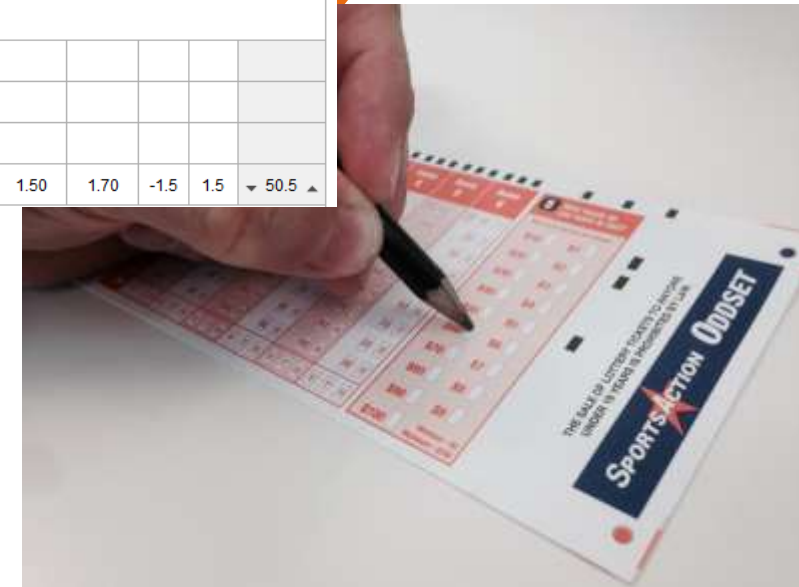
Product Overview - Retail

- Sports Action products:
 - Oddset (2&3)
 - Point Spread
 - Over/Under
 - Toto
 - Props
- Selection Slip
- 2 menus/week, max. 120 events per
- 65% expected payout

I want to bet:

Show me:

Menu 2358		Sporting Event				Oddset 3-Outcome						
#	Cutoff	Sport	Visitor (V)	Home (H)	V	Tie	H					
6/14/2018												
7	04:00PM	BSB	TAMPA BAY	NEW YORK - Y	3.05	3.00	1.70	2.1				
8	04:30PM	BSB	SAN DIEGO	ATLANTA	2.55	3.00	1.90	1.85	1.40	0.5	-0.5	8.5
9	05:30PM	CFB	EDMONTON	WINNIPEG	1.40	3.80	3.65	1.20	2.50	-6.5	6.5	49.5
10	06:30PM	BSB	NEW YORK - M	ARIZONA	2.25	2.95	2.15	1.65	1.55	0.5	-0.5	8.5
11	07:00PM	BSB	BOSTON	SEATTLE	1.90	3.00	2.55	1.40	1.85	-0.5	0.5	8.5
6/15/2018												
12	05:00AM	SOC	URUGUAY	EGYPT	1.35	3.05	5.50					
13	08:00AM	SOC	IRAN	MOROCCO	3.15	2.55	1.85					
14	11:00AM	SOC	SPAIN	PORTUGAL	1.75	2.65	3.30					
26	06:00PM	CFB	TORONTO	SASKATCHEWAN	1.90	3.70	2.20	1.50	1.70	-1.5	1.5	50.5



Product Overview - Retail

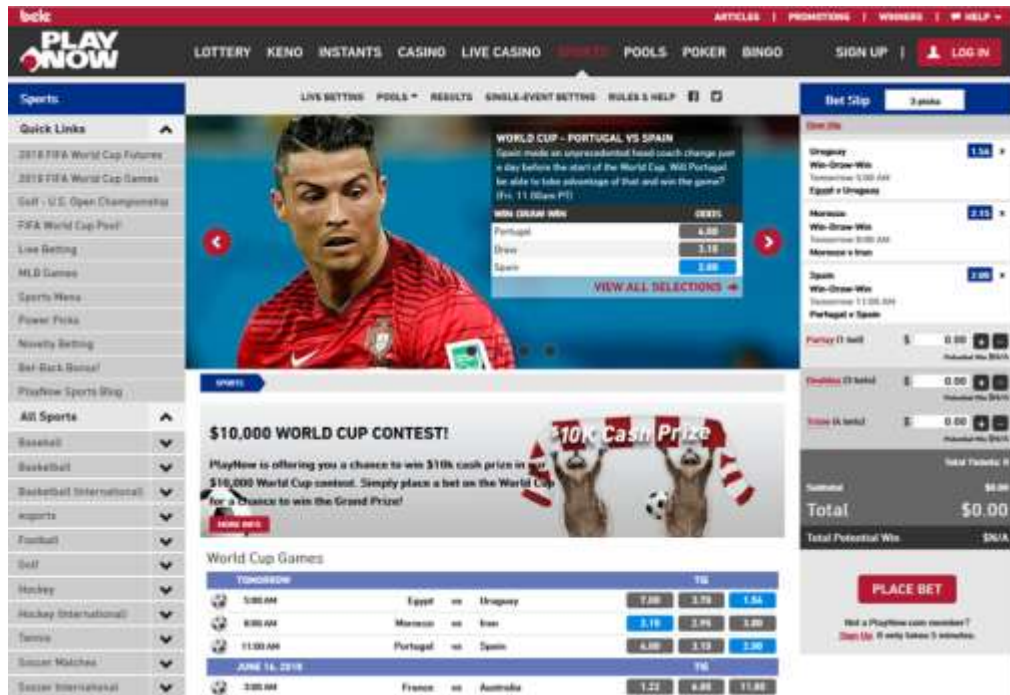
- Odds set internally
- Nightly results from contractors
- 3700 retail locations
 - Convenience, gas, mall kiosks, bars
 - Limits per retailer & per game



Product Overview - Online

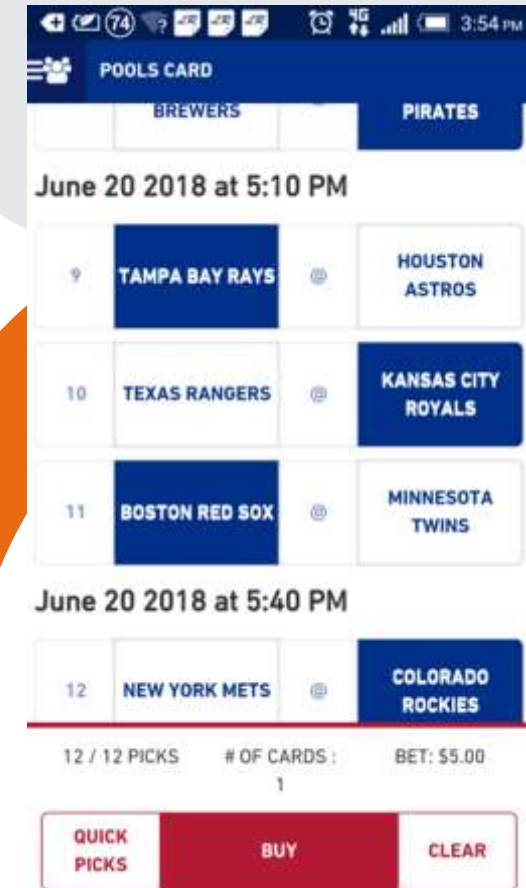
2012 – PlayNow Sports (web)

- *OpenBet & Paddy Power*



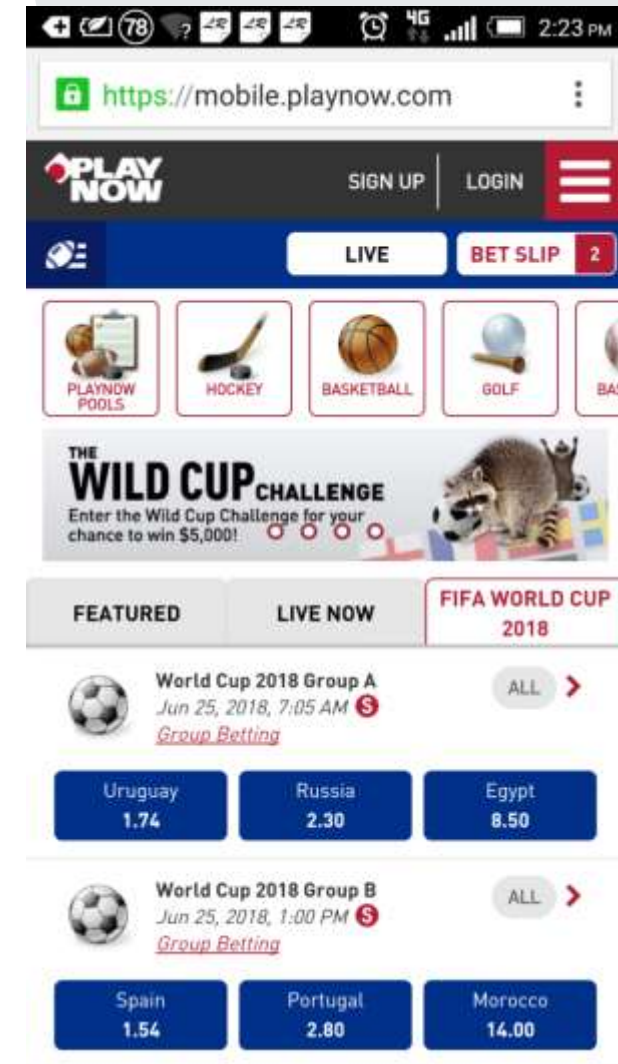
2013 – Mobile web app

2016 – Pools



Product Overview - Online

- Similar offers to competitors
 - Live Betting
 - Unlimited events
 - Novelty bets & eSports
- Dynamic odds, competitive pricing



Player Demographics

- 90% male
- Online average age: 39 (*mobile = 37*)
- Retail average age: 49
- Above average income & education
- Market size / share



Grey Market - Top Competitors



Limited enforcement in Canada (*.net*)

Future

- Responsive web & mobile
- Native app
- New features
- Simplified UX
- Convergence with Retail Product