A YEAR OF INCREASED GAMING
A REDISTRIBUTION MODEL FOR ALL

2015 was a year of dynamic activity that allowed us to confirm a long-standing and balanced redistribution model on the one hand, and to prepare for the future by embracing the digital revolution on the other.

STAKES ON THE INCREASE....

+5.4% increase in sales compared to 2014

€10 average weekly stake per player

... FOR THE BENEFIT OF ALL CONCERNED...

€13.7BN in stakes in 2015

ALMOST 95% of which were redistributed

AND 5.1% for FDJ® to create innovative and enjoyable games

OWNERSHIP STRUCTURE

+72% State — +20% former issuers of French National Lottery tickets*

+5% FDJ employees’ mutual fund — +3% Soficoma (pool of brokers-agents).

* of which: Union des Blessés de la Face et de la Tête (9.2%), Fédération Maginot (4.2%), IDSUD (2.6%), Confédération des débitants de tabac (2%), Mutuelle du Trésor (1%), Comalo (0.6%), Émissions Berger (0.4%)

... AND FOR AN ENHANCED VISION OF GAMING

FDJ 2020, A DIGITAL TRANSFORMATION PROJECT

Launched in 2015, FDJ 2020 is a strategic project that sets out to propel the company into the digital era by imagining the consumption patterns and games of tomorrow. For this purpose, its target is to increase the share of the company’s “digitized” sales to the 20% mark by 2020, i.e. the share of sales that use a digital service, either within the physical network, or online. This level is four times higher than that of 2014.

FDJ 2020 will reach this target in particular by relying on its many partnerships with leading businesses and innovative start-ups. This is what is referred to as “open innovation”!

2020 TARGET

>€500 MILLION in technological investments to give effect to the digital transformation
MORE PLAYERS, MORE WINNERS

Giving as many people as possible a chance, obviously! But with an underlying obligation for all: an activity following a Responsible Gaming policy.

PLAYERS WHO ARE ALWAYS THERE

26.3

MILLION PLAYERS IN 2015*

* players aged 18 and over

20.1M draw game players
18.6M scratch card players
3.3M sports bettors
3.3M express game players

2020 TARGET

+1 MILLION new players, with a focus on young adults and women

EVEN MORE MILLIONAIRES

215 WINNINGS greater than or equal to €1 million, vs. 211 in 2014

1 MILLIONAIRE every two days

€40M record prize won with Euro Millions - My Million

€7M record prize won on fdj.fr

WHEN ENTERTAINMENT GOES WITH PROTECTION

A PROACTIVE PREVENTIVE APPROACH

2015 saw two original initiatives intended to prevent the risks of excessive gaming on the one hand, and gaming among minors on the other:

• For the Rugby World Cup, FDJ distributed temporary rugby ball-shaped tattoos to its retailers to help them refuse the sale of games to minors;
• The Playscan software is now optimised to allow players to monitor their own gaming behaviour more precisely.
**NEW GAMES, NEW PRACTICES**

At core of our success in 2015 lies an offering of recreational, innovative games that are constantly renewed, and that embrace digital technology and new consumption patterns.

---

**GAMES FOR EVERYONE**

- **Scratch Cards**: 46% of stakes
- **Sports Betting**: 17% of stakes
- **Lottery Draws and Express Games**: 37% of stakes

---

**New Games Take the Stage**

Alongside the traditional releases in the illiko® range, 2015 saw the arrival of a new line-up of amusing and interactive online games such as “Gare O Loup !” or “Ruée vers l’or”, which remind of the casual games universe. 2016 will see the arrival of the latest generation of card games such as “La Poule aux œufs d’or”, for a combined physical and digital experience.

---

**Headed Towards Increasingly Connected Sales Outlets**

Paperless sports betting slips, paperless LOTO® lottery grids... A unique multi-function terminal on which customers can find our entire offering is currently being deployed in our sales outlets. In the age of “phygital commerce” (which means integrating digital service in physical locations), where everything is becoming connected, we are testing technological solutions in our sales network to improve our knowledge of customers and enhance their gaming experience.

---

**2020 Target**

20% of sales via a digital service (physical network or online)

---

**Physical Network**

- 31,900 sales outlets in 11,500 towns and villages
- Number 1 local network in France
- 4.4 billion transactions
- 96% of sales

---

**Digital**

- 1.3 million online customers (+100,000 new customers)
- €567 million in sales, representing 4.1% of stakes
- +19% growth in digital sales
- +10% growth in online sports bets
- 13% of digital sales made on mobile devices

---

**Investing in the Digital Transformation**

Innovation in the digital world often equates with shared expertise. This is what is referred to as “open innovation”! To successfully carry through the FDJ 2020 project, in 2015 we entered into a number of strategic partnerships. Firstly in the gaming domain with Asmodée, Europe’s second-biggest board game developer. Then through the Web School Factory, to associate new generations with the company’s future digital undertakings. Lastly, to bring us closer to innovative start-ups, we invested €13 million in the Partech Ventures capital fund.
The image text provides information on the company's human capital and gaming initiatives. The text is divided into two main sections: HUMAN CAPITAL and GAMING BENEFICIAL TO ALL. The HUMAN CAPITAL section highlights the company's commitments to diversity, gender equality, and social responsibility. It mentions a target of 30% of women in management by 2020, with 78% of employees satisfied with their quality of life at work. The GAMING BENEFICIAL TO ALL section discusses social responsibility and the benefits of gaming to all. It notes that social responsibility shapes the entire group and is at the core of their strategy. The image includes diagrams illustrating these commitments and achievements, such as the number of employees involved in the company's digitalisation and the extra-financial rating given by Vigeo. The text also references the distribution of funds to WWF France's projects and the extra-financial rating of 78/100.
FDJ FOR SPORT

For many years now, we have sponsored sport in general, and French sportsmen and women in particular. Our commitment: promoting access to sport for all.

SUPPORT FOR SPORT IN FRANCE

For many years now, we have sponsored sport in general, and French sportsmen and women in particular. Our commitment: promoting access to sport for all.

PARTNER OF THE SPORTS MOVEMENT

In 2015, FDJ became the founding partner of “Le Tremplin” innovation springboard for the sporting sector in the City of Paris. This incubator provides start-ups with support and a set of services: special access to financing, conference areas, open co-working space, etc. The goal is to find technological solutions to sporting challenges, and in particular to promote the practice of sport by all.

START-UP COACH

In 2015, FDJ became the founding partner of “Le Tremplin” innovation springboard for the sporting sector in the City of Paris. This incubator provides start-ups with support and a set of services: special access to financing, conference areas, open co-working space, etc. The goal is to find technological solutions to sporting challenges, and in particular to promote the practice of sport by all.

SPONSOR AND OWNER OF THE CYCLING TEAM

10th stage win on the Tour de France at Alpe-d’Huez for the FDJ team, won by Thibaut Pinot

39 young cyclists trained as part of the sporting and professional “Cycle Formation” project launched by the FDJ Corporate Foundation

SPONSOR FOR SPORTS AND “SOLIDARITY” PROJECTS

120 associations supported by the FDJ Corporate Foundation

13 able-bodied and disabled athletes supported with the Challenge programme

25% of the FDJ Corporate Foundation’s budget earmarked for sport and handicap projects

2nd “Run & Bike Solidaire” race, attracting 1,600 participants

€18M allocated to the FDJ Corporate Foundation for the present 2013-2017 term

CHANGING OUR PERCEPTION OF DISABILITY: WIND IN THE SAILS

For the first time, the FDJ Corporate Foundation, which sponsors the “Des Pieds et Des Mains” association, will partner the 2015 Tour de France Sailing Race, with the underlying objective of changing our perception of disability. Skippered by Damien Seguin, Paralympic champion and 4-time World champion, the combined able-bodied and disabled crew battled alongside the best for the three-week race. The “Fondation FDJ – Des Pieds et Des Mains” boat will be present on the 2016 Tour de France Sailing Race.
FDJ 2020 OR MOVING TOWARDS DIGITALISATION

Launched this year, the FDJ 2020 strategic project seeks to promote the digitalisation of our company, its products and services, and the network to successfully negotiate the transition to the all-digital age.

Between now and 2020, no less than €500 million will be invested to modernise the information system and digitalise sales outlets.

Our strategic project is also intended as a vehicle for acquiring new customers via the physical and online networks. The objective is threefold: a further one million players in the next five years, 20% of sales in digital, and 10% of sales on next-generation innovative games!

This development effort involves an open innovation approach via partnerships with established businesses or start-ups. Lastly, FDJ 2020 includes an international part via the sale of technologies and services to gaming and/or sports betting operators.