

# DIGITAL TRANSFORMATION

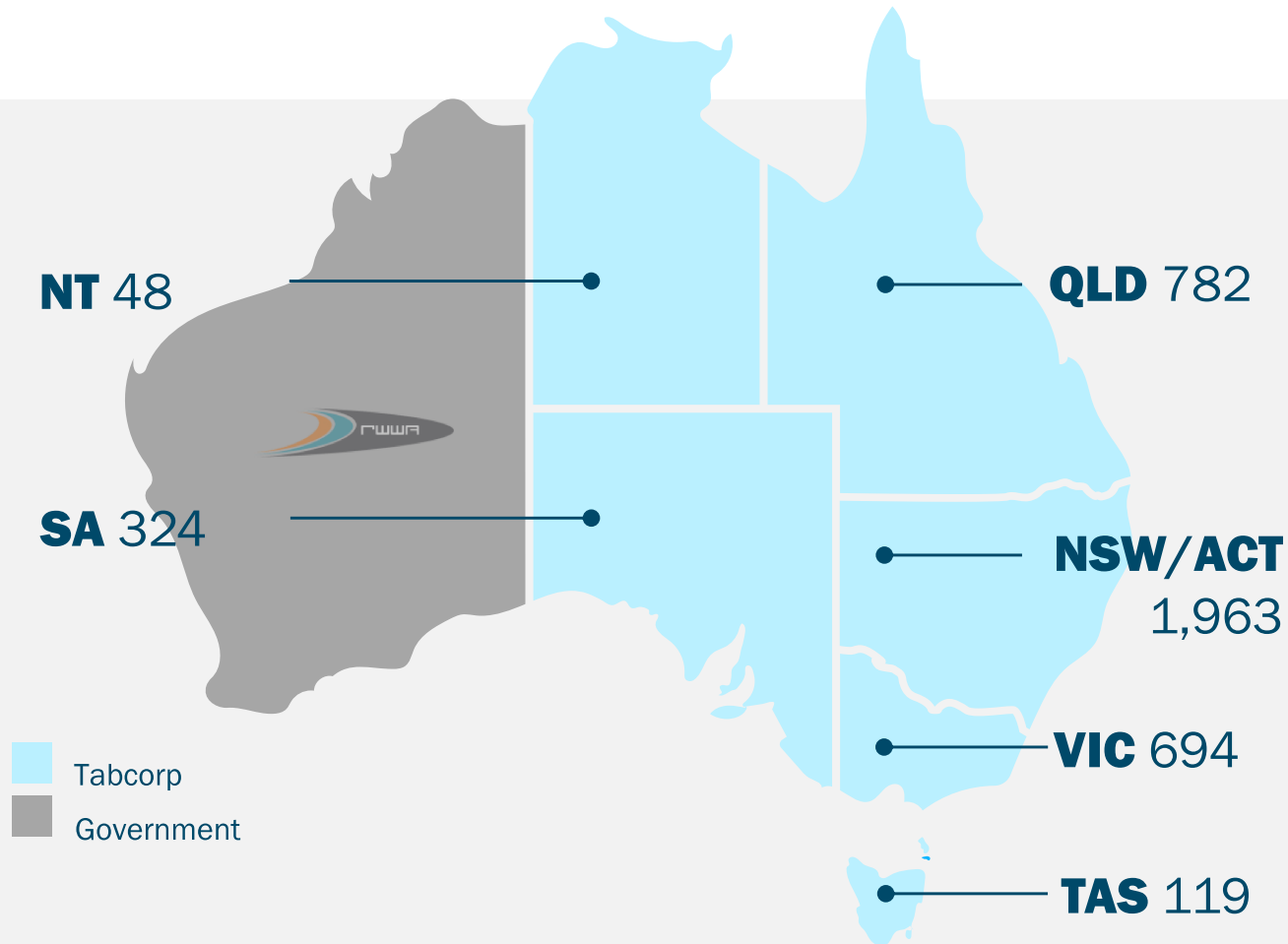
## GMDC

**PRESENTED BY**  
SIMON DOOLEY

# TODAY'S AGENDA

- 1. NEW TABCORP OVERVIEW & FOOTPRINT**
- 2. LEVELLING THE PLAYING FIELD**
- 3. GEO LOCATION TECHNOLOGY**
- 4. THE NSW RETAIL NETWORK**
- 5. PERFORMANCE**
- 6. THE NEW TAB APP**
- 7. ATM PARTNERSHIPS**
- 8. TABIFY**
- 9. DEFINITIONS**
- 10. QUESTIONS**

# NEW TABCORP OVERVIEW & FOOTPRINT



## WAGERING & MEDIA



## GAMING SERVICES



# LEVELLING THE PLAYING FIELD

Addressing inequities in our license and regulatory environment will create a more sustainable industry in the long run.

## LEVEL THE PLAYING FIELD

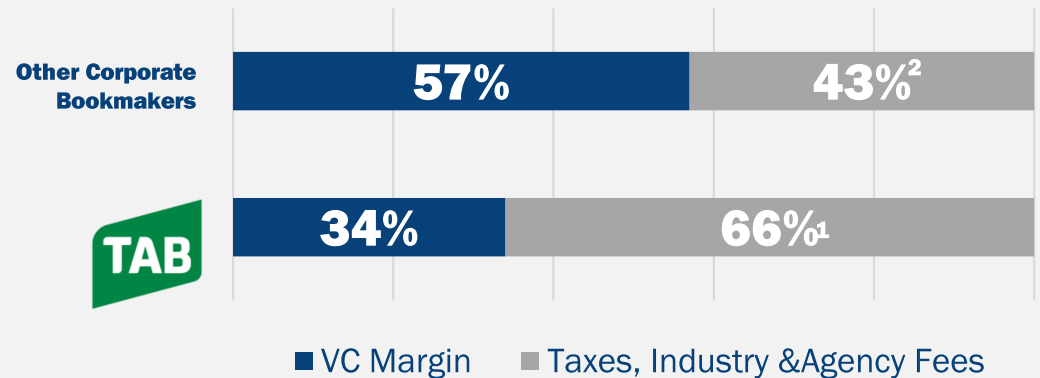
**Change the way we participate in the domestic wagering category**

- Reshape licences that level the playing field
- Selectively pursue licence structures that maximise economic value

## HARMONISE REGULATIONS

**Work towards driving national regulatory reform**

- Promote a unified national regulatory framework making our participation simpler and more efficient
- Improve approvals processes and speed to market for new products



### Racing on a winner with bookies' tax hike

MATTHEW BENNS

THE NSW racing industry will receive a \$300m boost over the next four years from an increase in the tax paid by foreign-owned online bookies.

The budget has increased the point of consumption tax to a flat rate for all bookies of 15 per cent, regardless of where they are based. It levels the playing field between online foreign-owned bookies such as

Sportsbet and Ladbrokes and Australian-owned Tabcorp.

"This is a win for the industry, a win for the animals and a win for the spectators," Racing Minister Kevin Anderson said.

The move comes after Queensland earlier this month increased its point of consumption tax by 5 per cent to 20 per cent.

Racing NSW chief executive Peter V'landys said: "The real winner is the NSW taxpayer as

they receive the vast majority of the tax collected."

The Australian Hotels Association and Tabcorp had been campaigning for the point of consumption tax to be moved from 10 per cent to make online bookmakers pay the same rate as Aussie bricks-and-mortar companies. AHA national chief executive Stephen Ferguson said: "This means that foreign-owned companies that have been trying to pinch our cus-

tomers and received preferential tax treatment are now on a level playing field."

The racing industry will receive 33 per cent of the point-of-consumption tax, giving it a \$300m increase over four years.

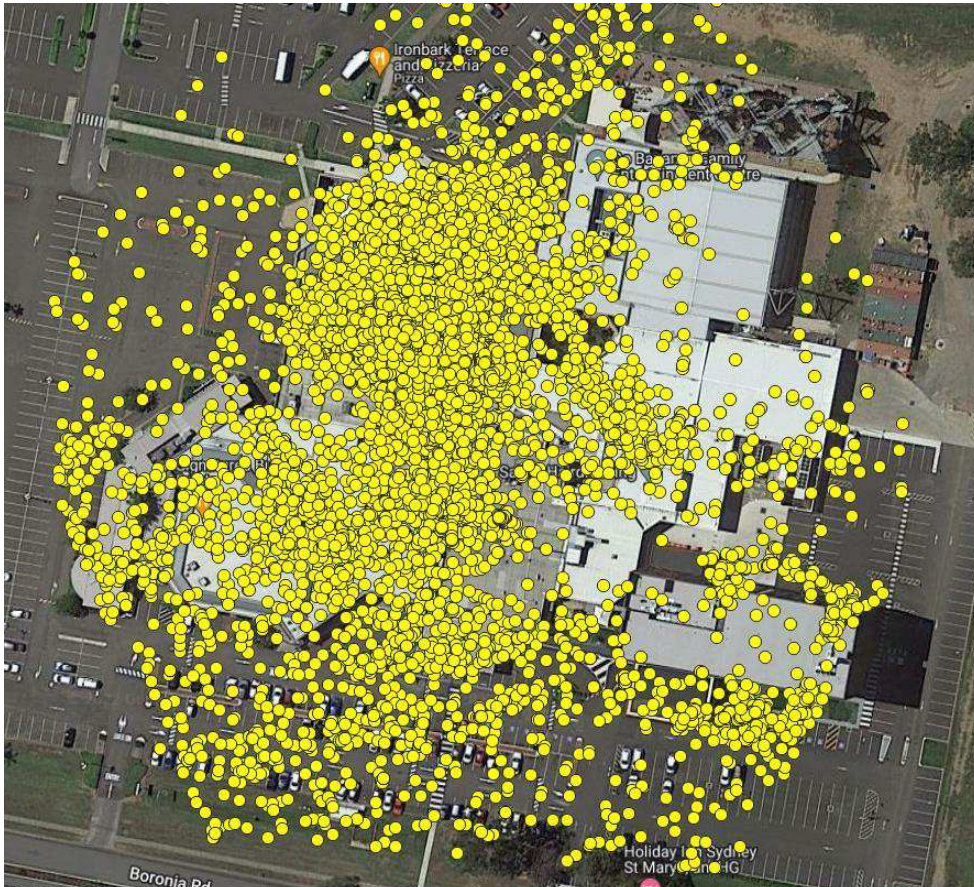
Tabcorp chief executive Adam Rytenskiid said: "Online betting has changed substantially since the TAB's licences were issued and this is an opportunity to better align with the modern economy."

The Daily Telegraph

22 June, 2022

1. Based on TAB revenue including Victorian Racing Industry interest 12mo to May 2022. Excludes GST Source: Sportsbet Investor Day presentation, September 2021

# GEO LOCATION TECHNOLOGY AND WHAT IT DRIVES



## **GEO-LOCATION TECHNOLOGY ALLOWS TAB TO DELIVER TO OUR VENUE PARTNERS AND THEIR CUSTOMERS:**

**IN-VENUE COMMISSION:** Commission paid to venues on bets placed within a TAB venue via the TAB app.

**OUT OF VENUE COMMISSION:** Commission paid for bets placed by customers (via the TAB App) acquired by the venue whilst outside the TAB Retail Network

**VENUE MODE:** Venue Mode allows TAB to deliver push notifications and offers to customers when they enter a venue.

**FOOD OFFERS:** Integrated food offers allow our venue partners to offer customers a reduced price on food items with TAB contributing the cost of the bonus bet.

**Tabcorp**

# VENUE MODE FOOD OFFERS

The current Meal Offer campaign is one redemption per week.

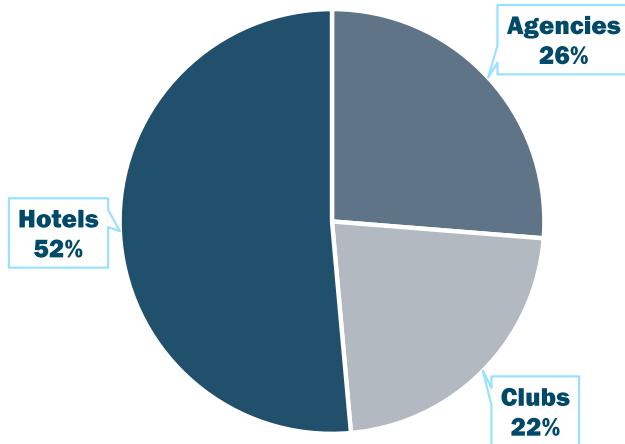
**Campaigns run Monday to Sunday from 12:00pm to 8:00pm (AEST).**

Customers can redeem one offer per campaign. E.g, If a customer redeems on a Thursday, they will not be able to redeem another offer until Monday, when the new campaign begins.

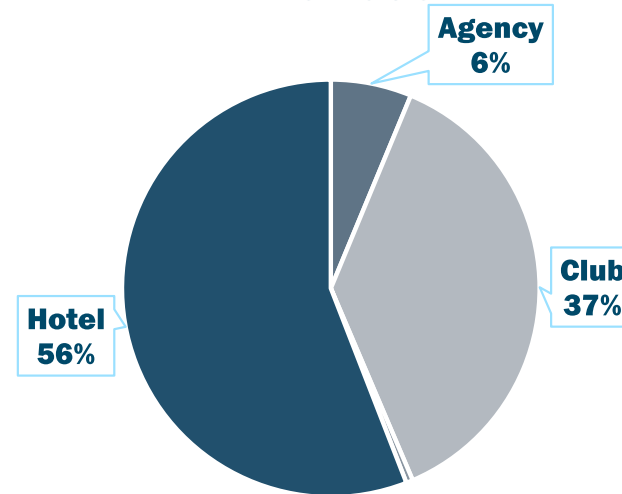


# NSW RETAIL NETWORK (VENUE COUNT & \$ CONTRIBUTION)

**% CONTRIBUTION TURNOVER**



**% VENUE COUNT**

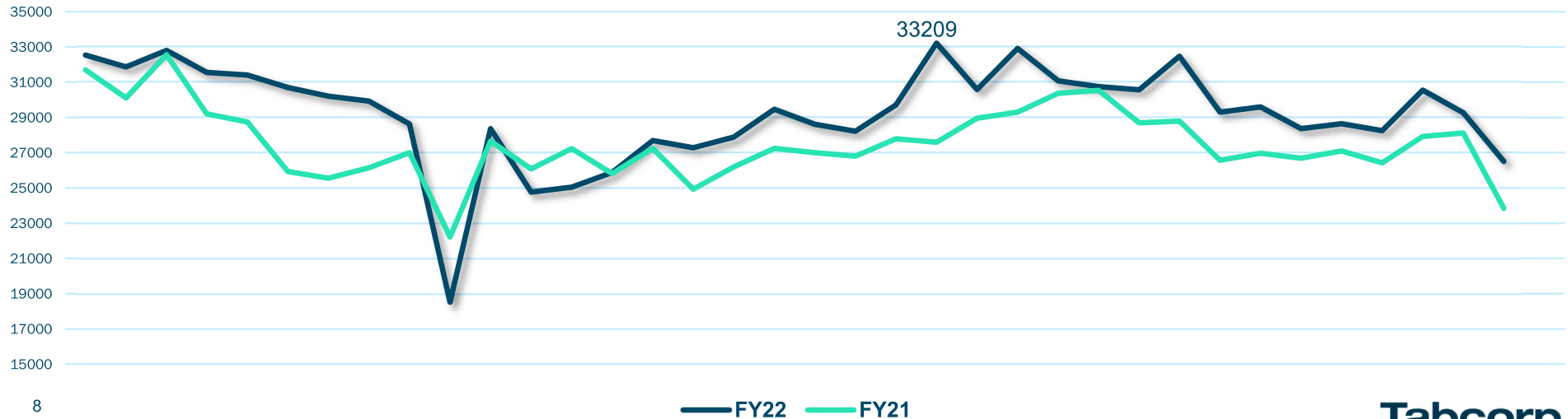


- The TAB exclusivity agreement with the NSW government extends until 2033
- This long-term license allows the TAB to deliver wagering products across our three (3) retail channels – Clubs, Hotels, Agencies & Digital Retail Venues.

# FY22 NSW RETAIL PERFORMANCE (POST COVID)

Cash & Digital Turnover	Cash Turnover	Digital Turnover	In Venue Actives	In Venue Visits
<b>(10.1%)</b>	<b>(-13.6%)</b>	<b>+18.0%</b>	<b>+6.4%</b>	<b>+9.5%</b>

**NSW RETAIL ACTIVES BY WEEK POST COVID TO 30 JUNE, 2022**

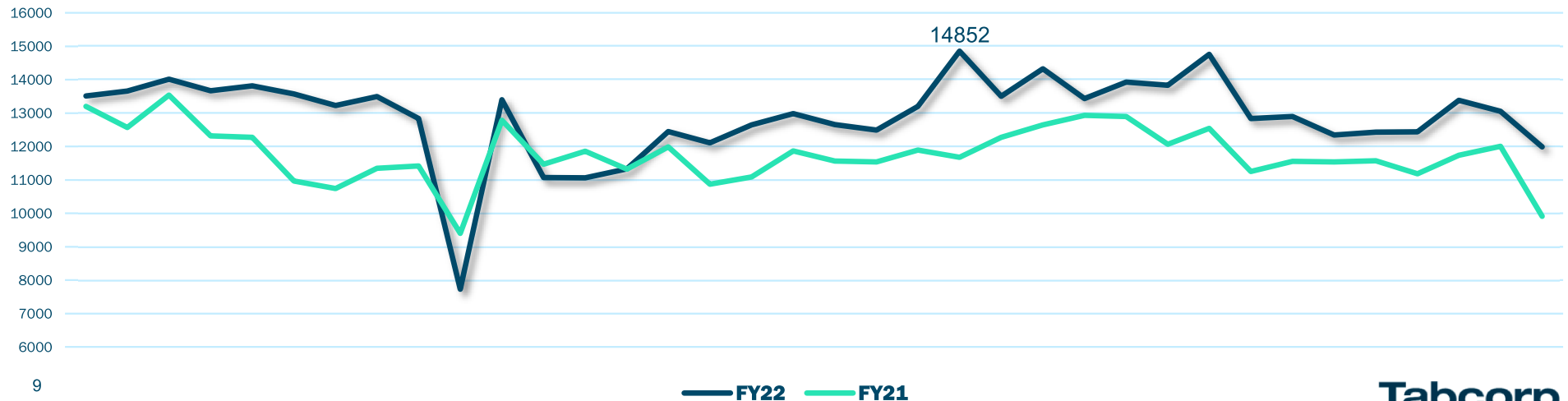




# FY22 NSW CLUBS PERFORMANCE (POST COVID)

Cash & Digital Turnover	Cash Turnover	Digital Turnover	In Venue Actives	In Venue Visits
<b>(-6.4%)</b>	<b>(-12.4%)</b>	<b>+21.0%</b>	<b>+7.0%</b>	<b>+13.7%</b>

**NSW CLUBS ACTIVES BY WEEK POST COVID TO 30 JUNE, 2022**



# MEASURING ACTIVES

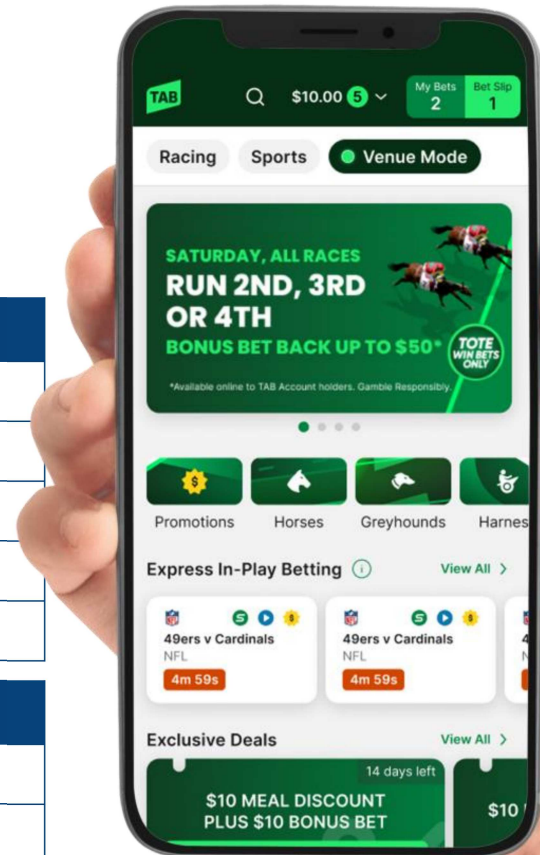
**NSW ACTIVES LW: 30,016**

NSW TOP 5
The Star (212)
Wenty Leagues Club
Bateau Bay Hotel
Wests Macarthur
Panthers, Penrith (86)

NSW TOP 5 HOTELS
The Star (212)
Batea Bay Hotel
The Paragon Hotel
Tacking Point Tavern
Highfield Hotel (67)

NSW TOP 5 CLUBS
Wenty Leagues Club (91)
Wests Macarthur
Panthers, Penrith
Revesby Workers
The Entrance Leagues (71)

NSW TOP 5 AGENCIES
Mingara (74)
Wyoming
Sutherland
Greenfield Park
Winston Hills (59)



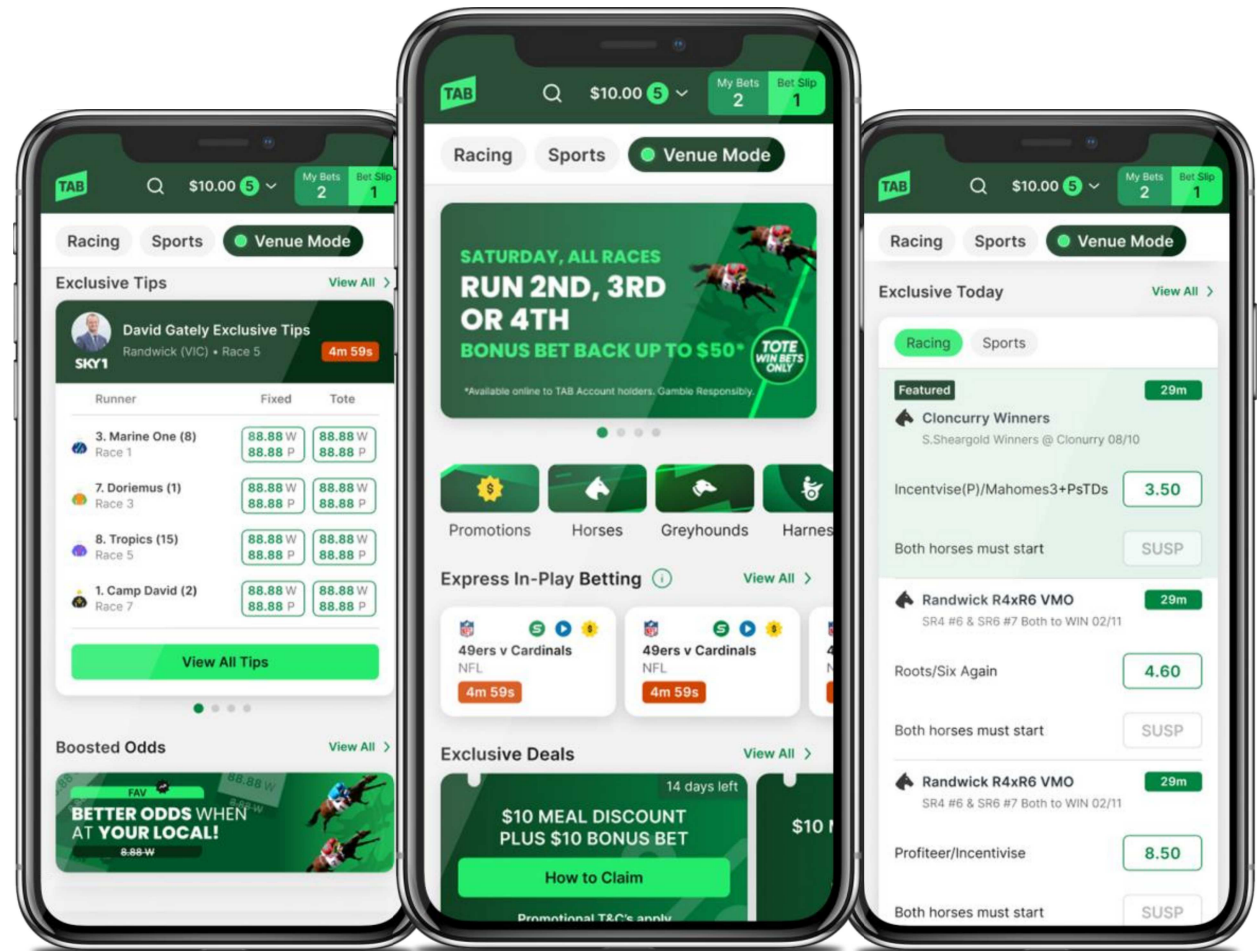
# THE NEW TAB APP

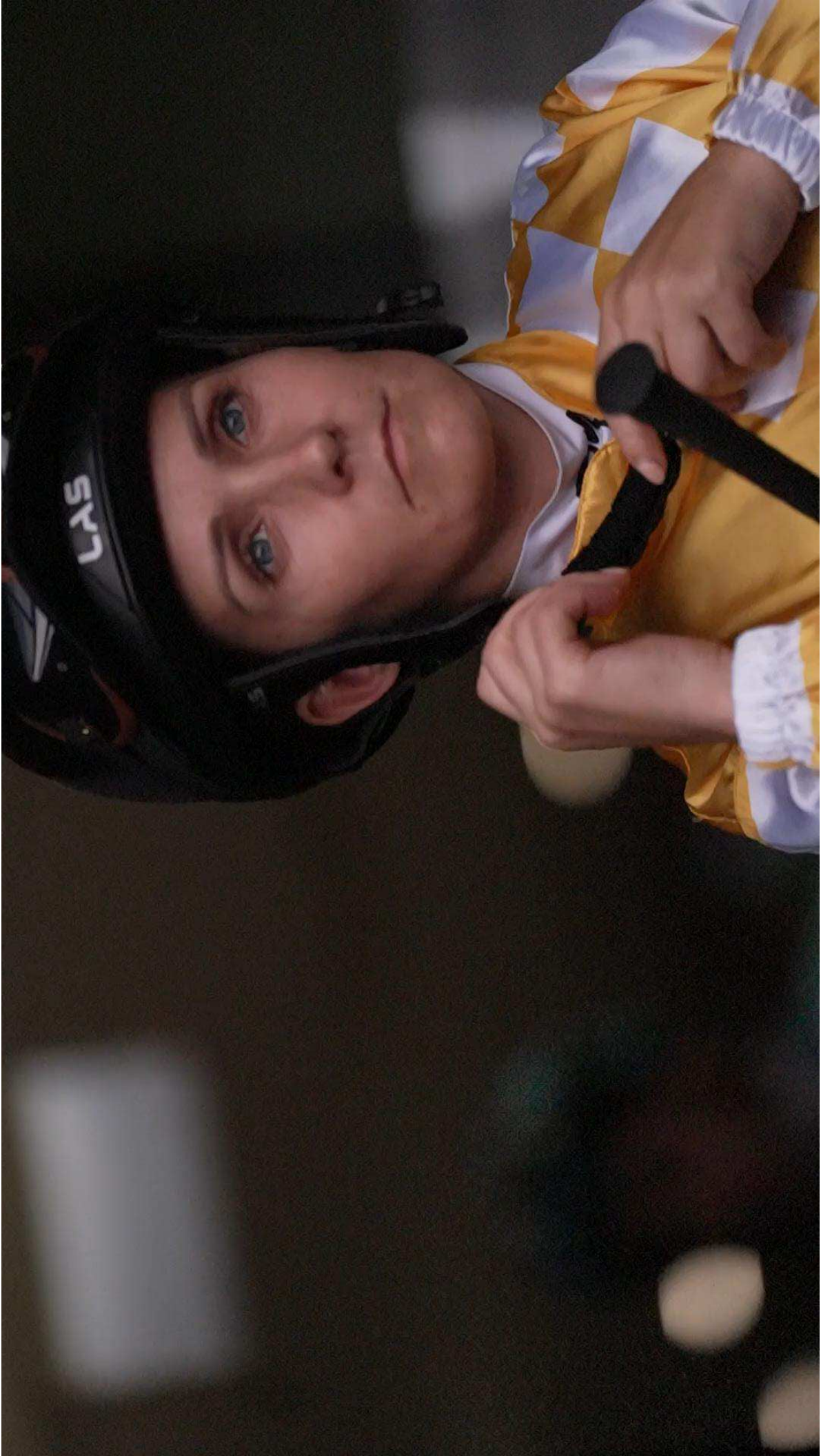
**COMING AUGUST-SEPTEMBER 2022.**

We're **RAISING THE GAME** for our customers with the new TAB App.

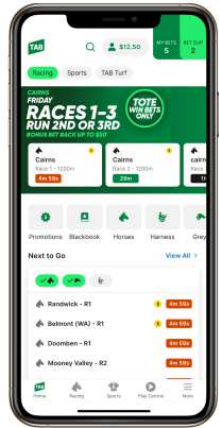
Join our knowledgeable TAB TEAM for 2 x 30 minute online sessions covering enhancements, new products, and everything in between for Day 1.

**MORE DETAILS COMING VERY SOON.**





# THE NEW TAB APP ROADMAP

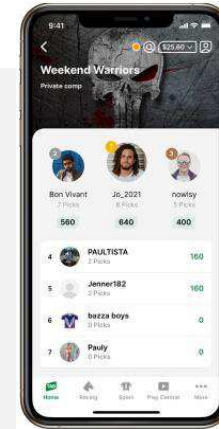


UX continuous improvement

Revised product funding models

Enhanced CX design focus

Improved speed to market through Regulatory reform



**FY22**

**FY23**

**FY24**

## AN ALL NEW BETTING EXPERIENCE

- Deliver an all-new betting experience with a refreshed User Interface (UI)
- Customers will have the same features as they enjoy today on the current TAB App
- NCPF requirements to be included in new digital experience (NSER, Activity Statements & IDV 72 Hours)

## ADDRESS CORE PRODUCT GAPS

- **SOCIAL BET SHARING**
- **SAME RACE MULTI**
- **EXPRESS RACING PAYOUTS**
- New racing form & tips service
- Popular Same Game Multi
- Enhanced customer care
- Leading Live Betting Experience
- Real time payments
- Personalised customer value

## DEFINE THE MARKET

- Innovative social betting features
- Integrated sky vision & content
- Betting product innovation
- Full digital integration of retail network

~80%

**NON-TAB CUSTOMERS** said the **NEW APP DESIGN** WOULD BE EASY TO **TRANSITION MY BETTING TO TAB**

# ATM PARTNERSHIPS

**TAB HAS PARTNERED WITH NEXT PAYMENTS AND BANKTECH TO PROVIDE TAB ACCOUNT CUSTOMERS WITH A SELF-SERVICE CASH DEPOSIT & WITHDRAWAL SOLUTION VIA A NETWORK OF ATMS.**

Pending regulatory approvals, we aim to enable these services by the end of the year.

For information regarding hardware requirements, please contact:

**NEXT PAYMENTS:** [info@nextpayments.com.au](mailto:info@nextpayments.com.au)

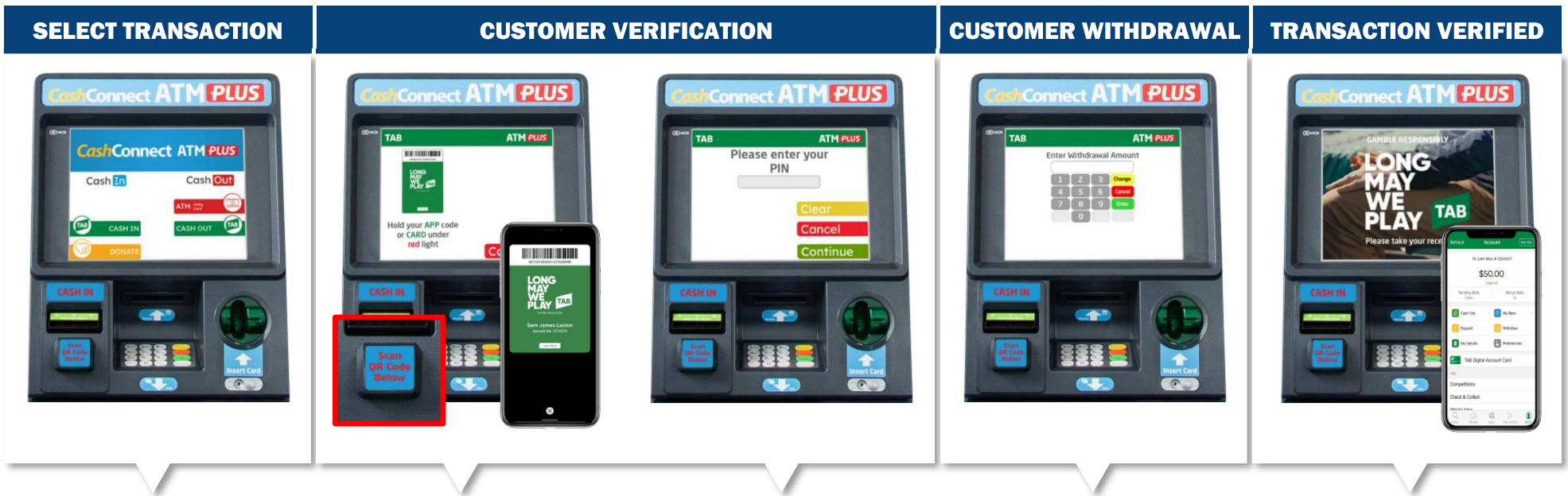
**BANKTECH:** [sales@banktech.com.au](mailto:sales@banktech.com.au)

\*subject to regulatory approvals required in each jurisdiction – not for circulation. Not available in Tasmania or South Australia



# ATM PARTNERSHIP: CUSTOMER JOURNEY

## INDICATIVE WITHDRAWAL CUSTOMER JOURNEY



John walks up to the ATM at his local pub and selects 'CASH OUT' to withdraw money from his account

John scans his TAB Account Card using the QR/barcode scanner

John enters his pin and selects continue

John enters the amount he wants to withdraw from his account.

Once processed, the cash is dispensed & John's Account Balance is updated in real time.

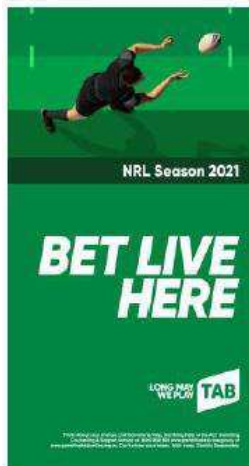
Subject to legal and regulatory approval. Screen designs are samples only and are subject to change – Not for circulation

# TABIFY

A FREE SOCIAL MEDIA RESOURCE , THAT ALLOWS YOU TO DRIVE FOOT TRAFFIC INTO YOUR VENUES



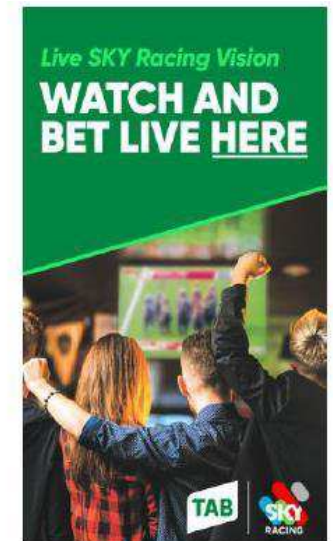
Sports & Racing Calendars



Sports with call to action messaging



Social Media Assets



- All assets have been approved by Legal and include appropriate RG messaging
- All Assets can be used via in-venue ePOS and social media.



# DEFINITIONS

**Parimutuel Racing:**

Betting into a "tote" pool, where a portion is retained by the tote operator, with winnings paid based on the remains.

**Fixed Odds Racing:**

A bookmakers style bet, where at time of issue, a customer is given an (almost guarantee) of a payout for a result, regardless of the "pool".

**Live Sport:**

A bet placed on a match or an outcome within a match, after it has commenced.

**Pre-Game Sport:**

As above, but betting ceases before the match commences.

**Trackside:**

Simulated Fixed Odds Racing, with standard bet types.

**Digital In Venue:**

Bets placed via TAB App in TAB Venues (Pubs, Clubs & Agencies)

**Digital Out Venue:**

Bets placed via TAB App outside of TAB Venue

# SKILL SESSIONS

**THESE FREE LIVE SESSIONS HOSTED VIA MICROSOFT TEAMS ARE THE PERFECT WAY TO LEARN MORE ABOUT ENHANCING THE TAB IN YOUR VENUE, WITH TOPICS INCLUDING:**

- TAB App & Digital Commissions
- Monthly sport, racing, product & compliance overview
- Live Betting
- Home of U.S. Sports/Sky Sports
- MyTAB



# QUESTIONS...

**TABIFY:** A SOCIAL MEDIA RESOURCE PROVIDING BRANDING, PRE APPROVED CONTENT AND MESSAGING, ALLOWING VENUES TO PROVIDE THE MOST UP TO DATE COMMS TO THEIR MARKETS, WITHIN THE REGULATORY GUIDELINES.

**PROXIMITY BASED MARKETING:** MESSAGING AND COMMS THAT BECOME “AVAILABLE “ TO PATRONS ONCE THEY ENTER A VENUE GEO FENCE SURROUNDING A CLUB, PUB, AGENCY, RACETRACK OR STADIUM.