

AGENDA

Introduction

New Product Requirement

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2

3

4

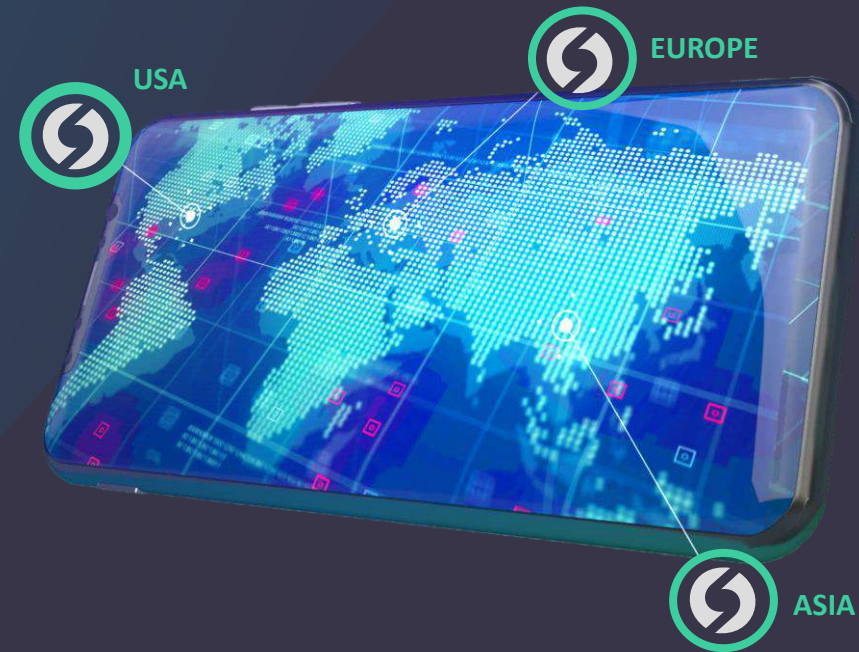
Global Sporting Landscape

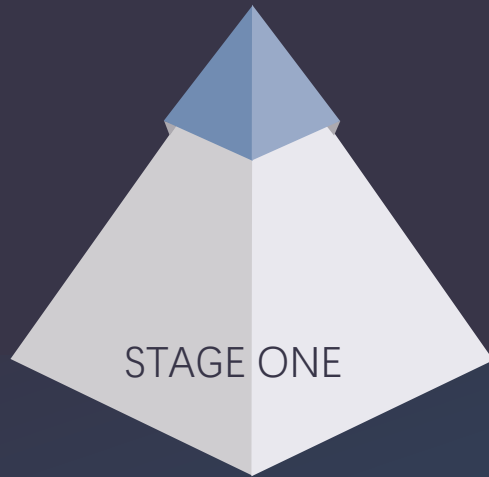
Some Examples

SBC | DIGITAL SUMMIT



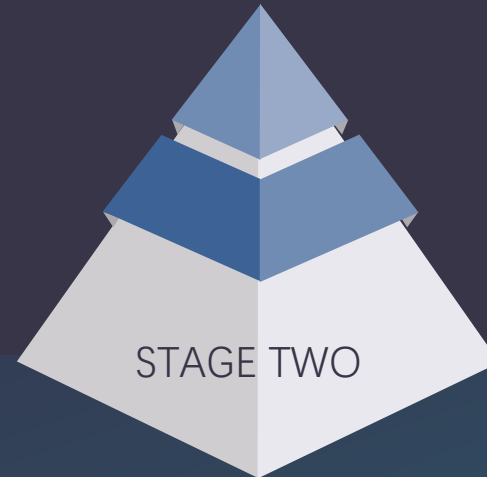
- ▶ 36 COUNTRIES
- ▶ 20 LANGUAGES
- ▶ 2M+ UNIQUE PLAYERS
- ▶ 11M+ GAMES PLAYED





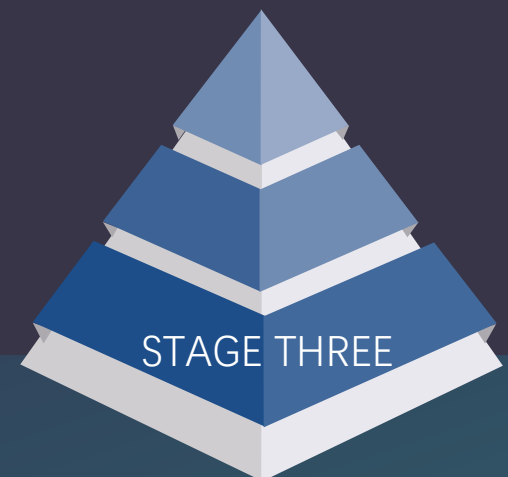
WHAT THE FUDGE

- No live sport, apart from unfamiliar regions, some with integrity/data question marks
- Limited Horse Racing, US & Australia
- Accelerated trends or event-driven growth?
- eSports
- Gaming Platforms - record engagement
- Poker, Casino & Virtuals
- Restrictions on bonuses and marketing
- FTP Quizzes keeping us all busy



GRADUAL RETURN – CLOSED DOORS

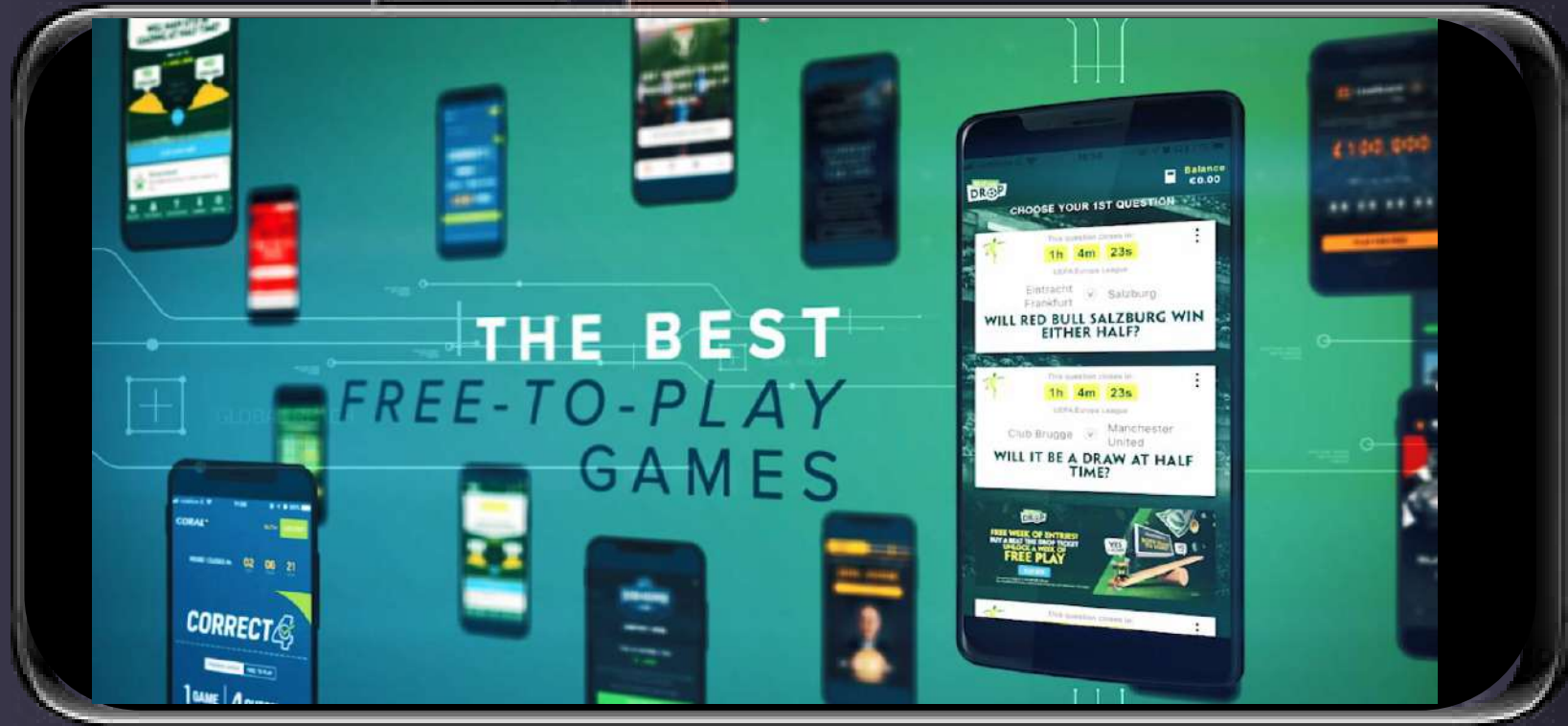
- Too big to fail?
- Is it a question if or when?
- Bundesliga in May?
- UK Racing in May?
- Premier League in June?
- PGA Tour in June
- Champions/Europa League in August?



FULL SPORTING FIXTURES

- Overabundance of sport
- Scheduling headache with a power struggle between sports for airtime and audience attention
- If Cheltenham was every week – what sport to lead with, how to attract and retain audience?
- Impact of recession – bet stakes, bet types, importance of Entertainment

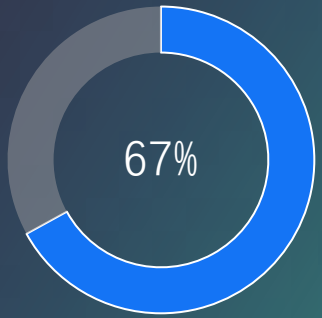
WHY FREE-TO-PLAY?



WHY FREE-TO-PLAY?

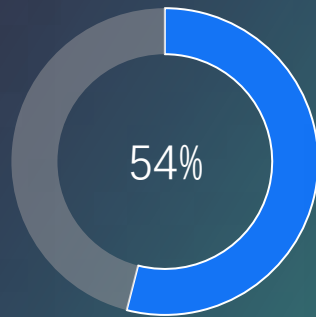
A RECENT CLIENT SURVEY LOOKED AT THE IMPORTANCE OF FREE-TO-PLAY FOR AN AUDIENCE OF REGULAR ONLINE GAMBLERS

PART OF THEIR WEEK



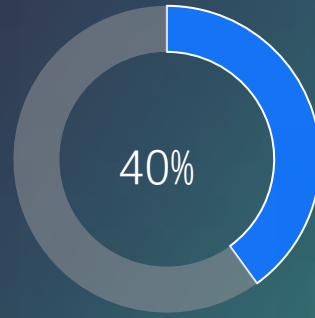
USE FREE-TO-PLAY GAMES REGULARLY

APPEAL



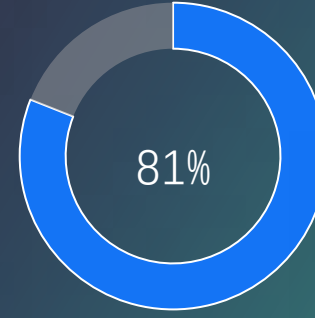
MAKES SPORT MORE INTERESTING

MOTIVATION



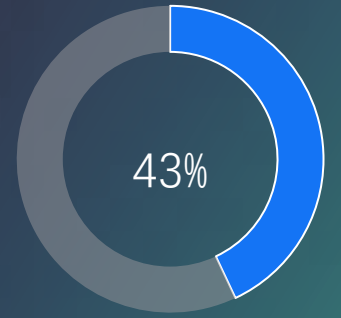
BIT OF FUN WITH FRIENDS

PRODUCT OFFERING



SLIGHTLY OR VERY IMPORTANT

RETENTION



HAVE SWITCHED BRANDS FOR A FTP PRODUCT

THE 5 PRODUCT CHECKPOINTS



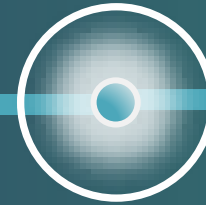
Entertain and engage your audience, a responsible approach that avoids over promotion of bonusing, Casino or Virtuals.



Retain base, remember log-in, and even an opportunity to grow your audience.



Needs to be fast and flexible, adapt to the gradual and unpredictable return of live sport.



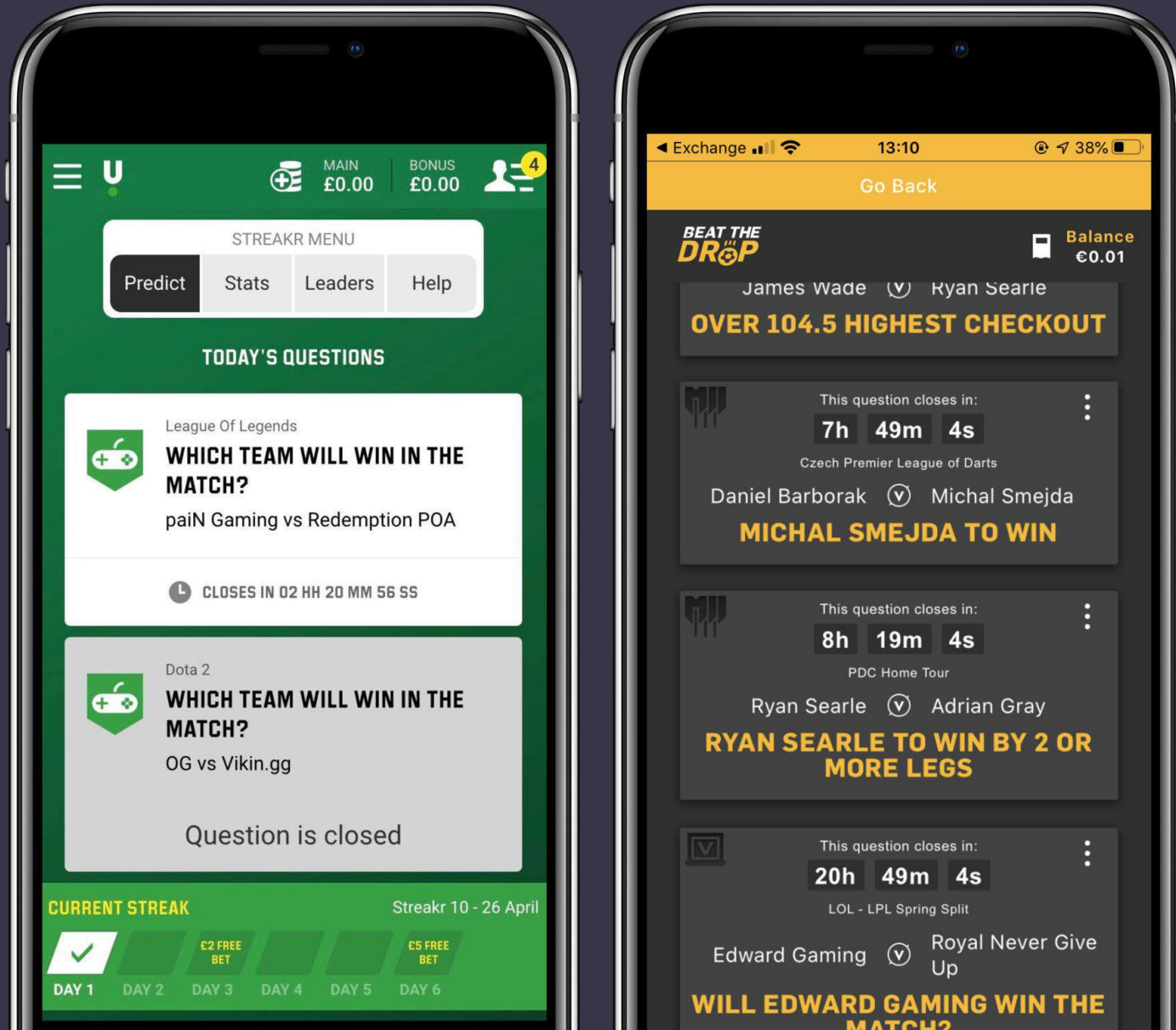
A short-term innovative solution that will also provide improved product and marketing mix in the medium and long term.



Musical chairs with industry disruption. Role of FTP to grow market share once Stage 2 and Stage 3 return.

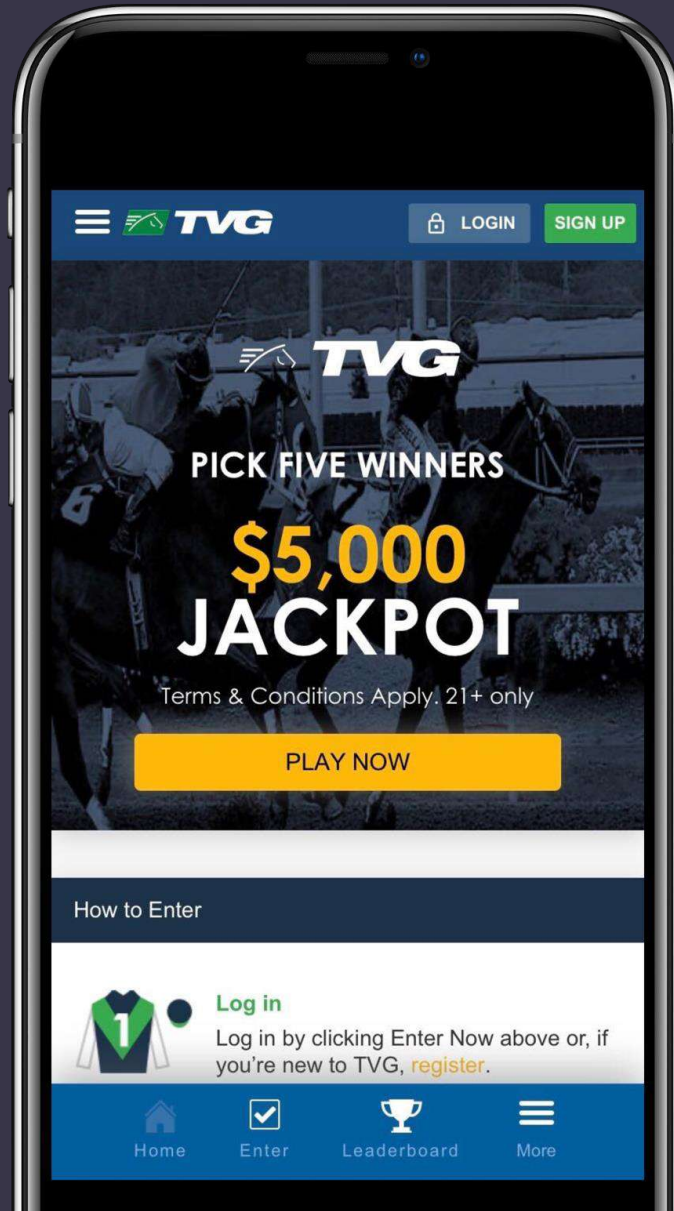
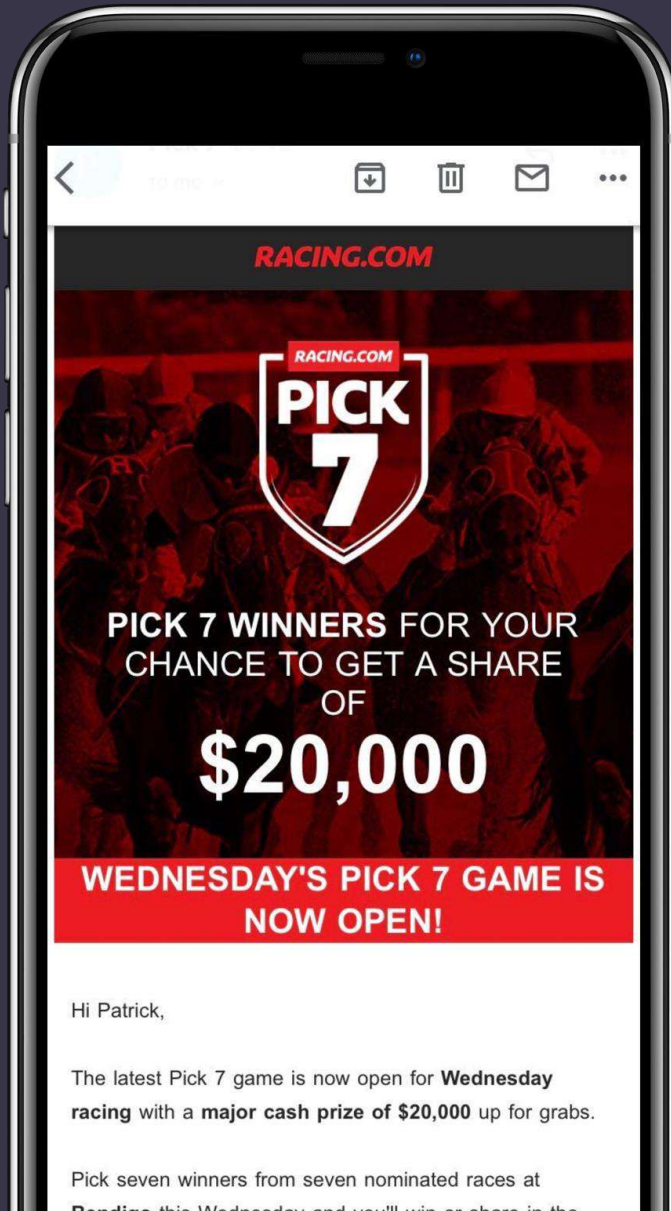


SOME EXAMPLES



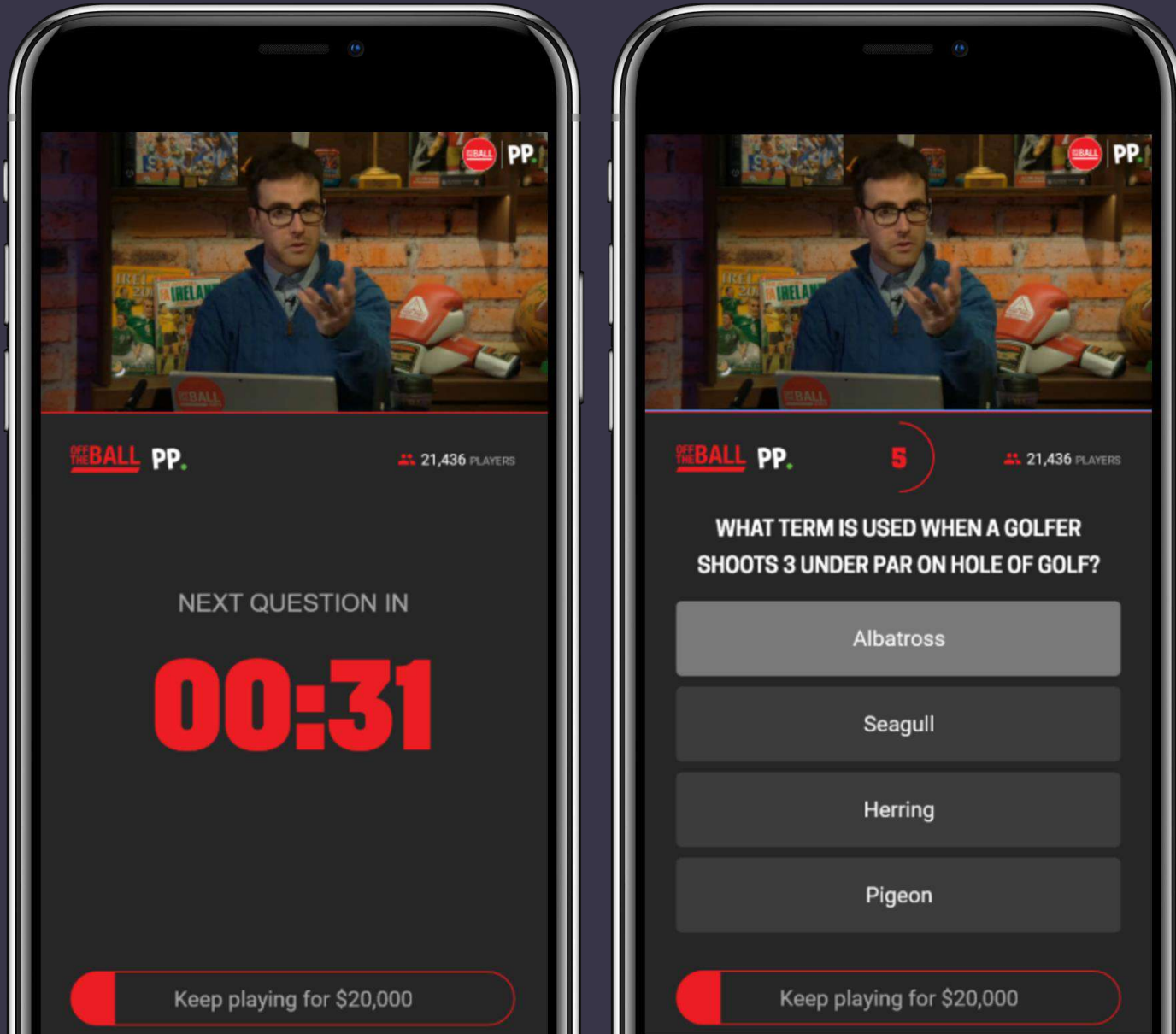
PIVOTING CONTENT

- Flexibility of format to pivot to events which were still taking place
- Multiple daily questions on events as diverse as PDC Home Tour, FIFA Electronic Football, League of Legends, CS:GO and ongoing Horse Racing in the US & Australia
- We are seeing day-on-day retention rates across these games as high as 84%



ONGOING CONTENT

- Some clients are lucky enough to be able to continue to offer core product
- Our clients increased their FTP frequency on those products, examples are:
- BetEasy Pick7 game, now running on Weds for \$20k in addition to Sat for \$50k
- TVG brought back Super 5 and run it across each Fri, Sat and Sun (from just 1 game of Super 8 previously)
- Engagement levels on these games are hitting record highs

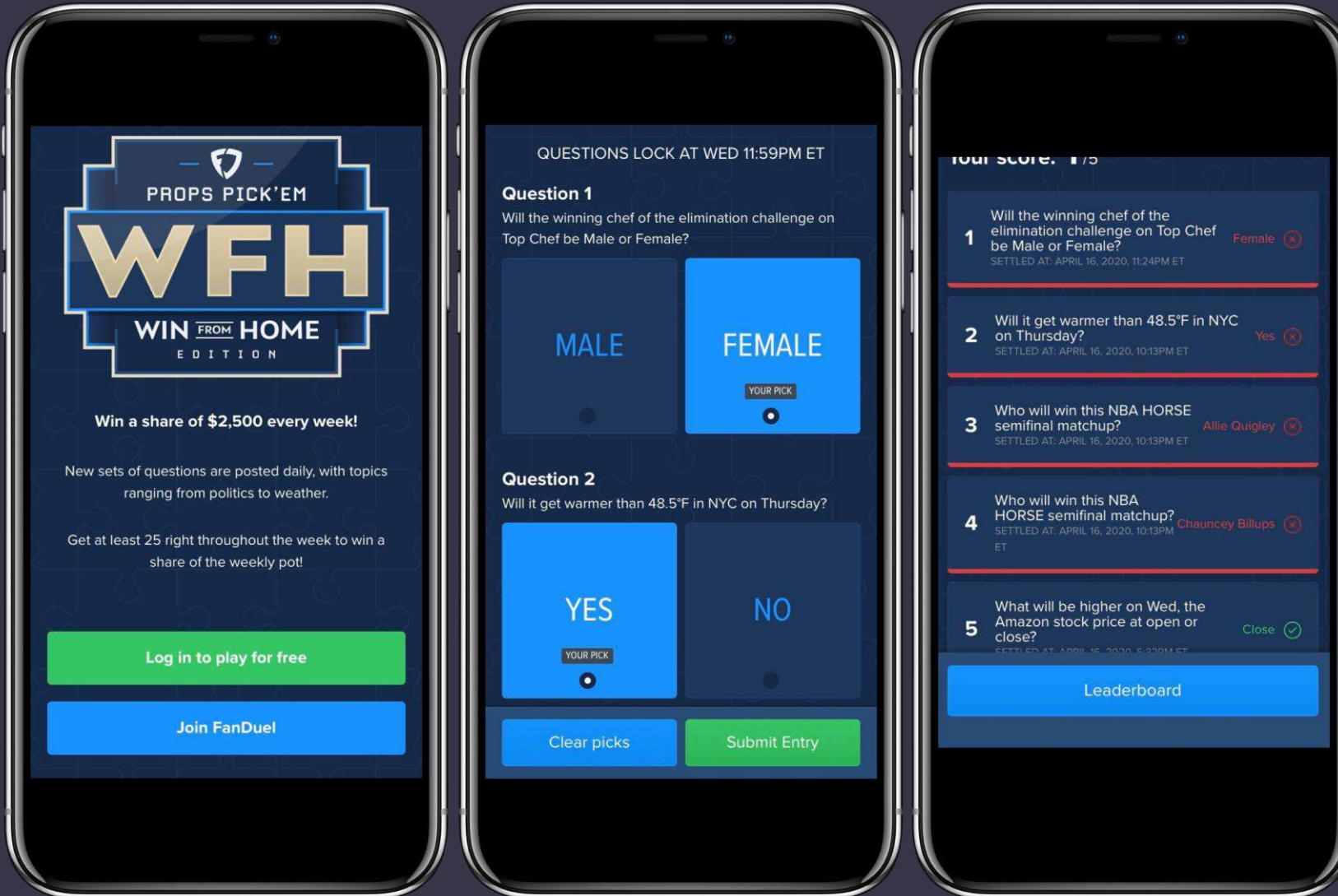


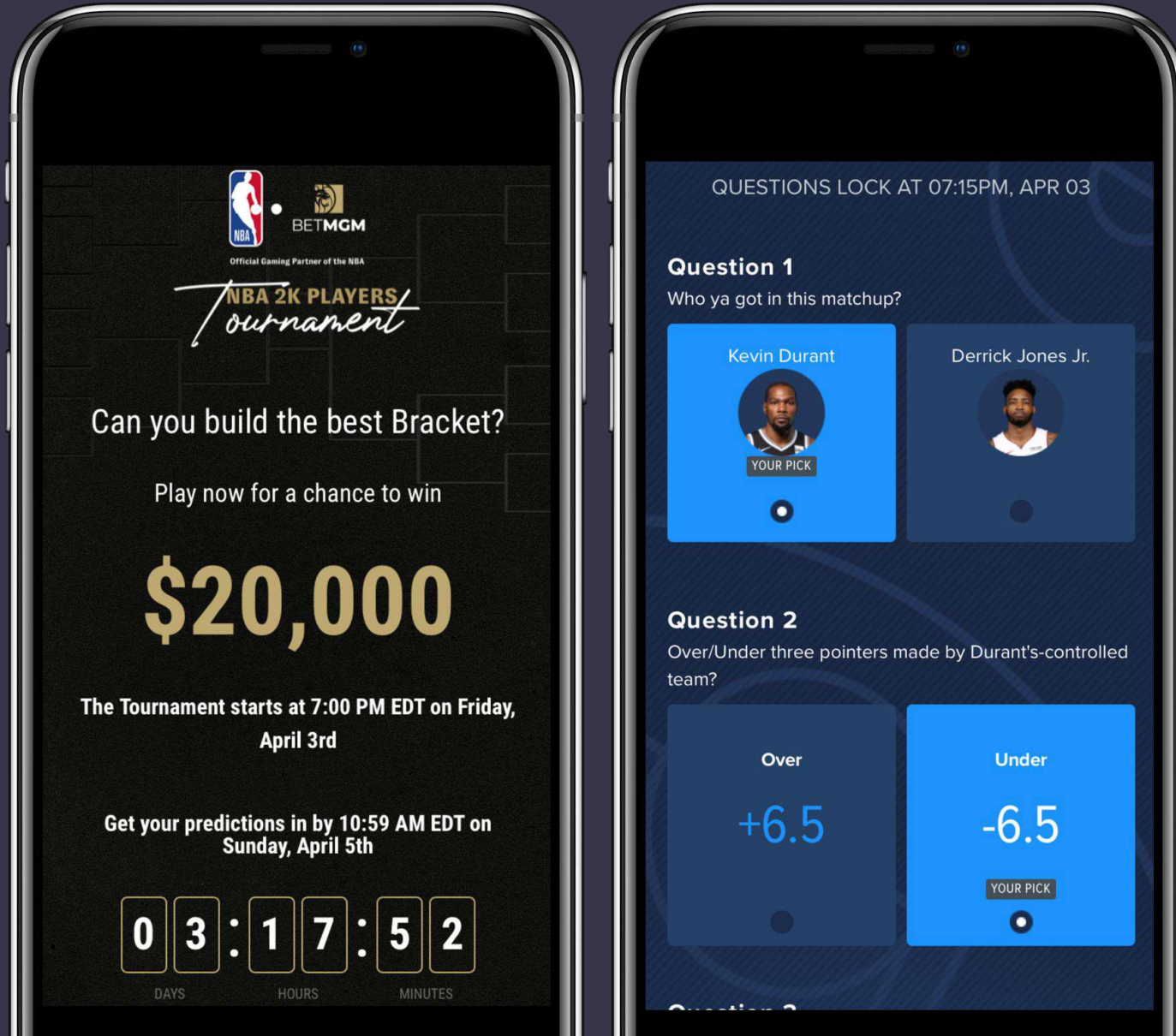
LIVE QUIZ GAMES

- HQ Trivia style
- These games feature well known hosts asking questions in real time
- Users given 10 seconds to answer each question
- Last man standing format where those left after the final question will share the prize

INTERACTIVE QUIZZES

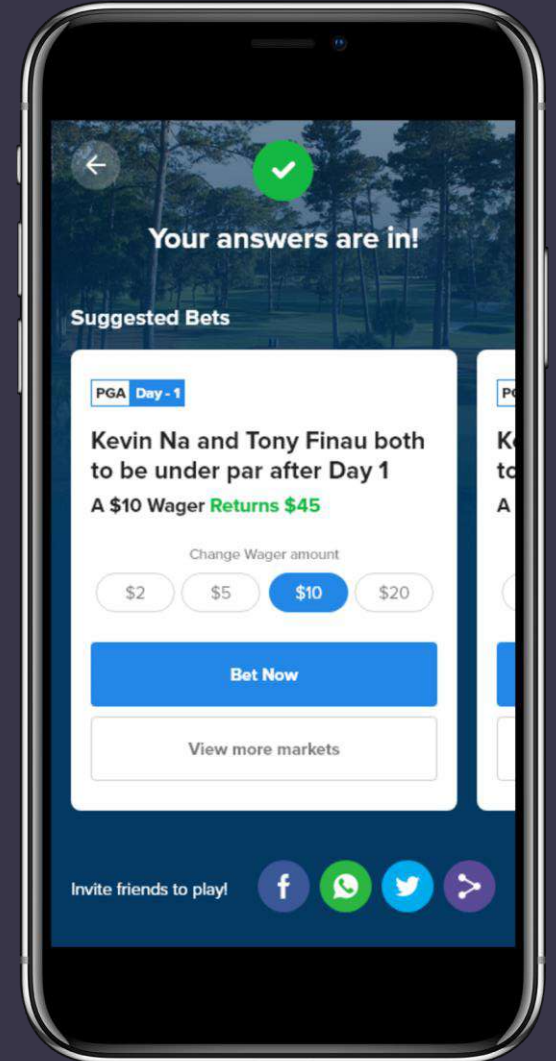
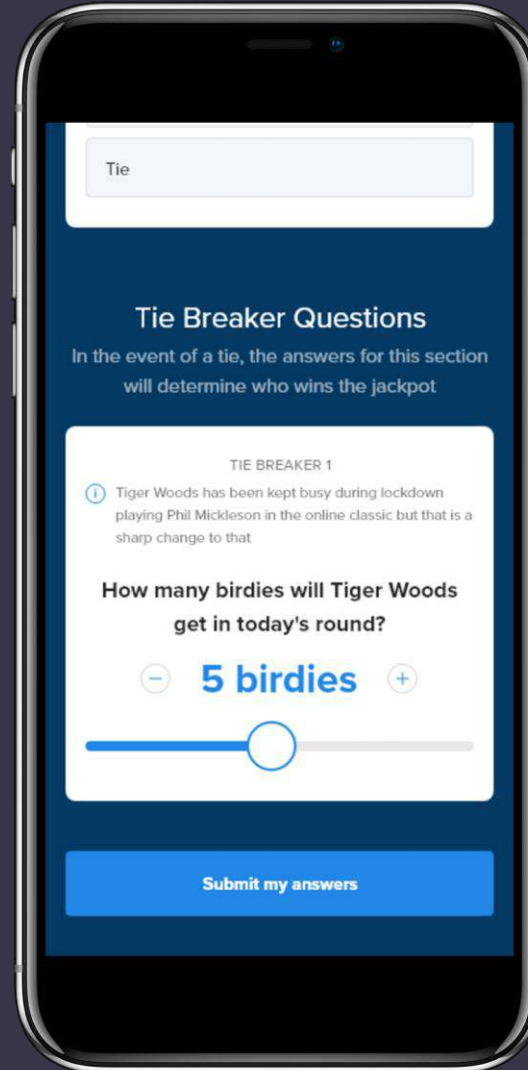
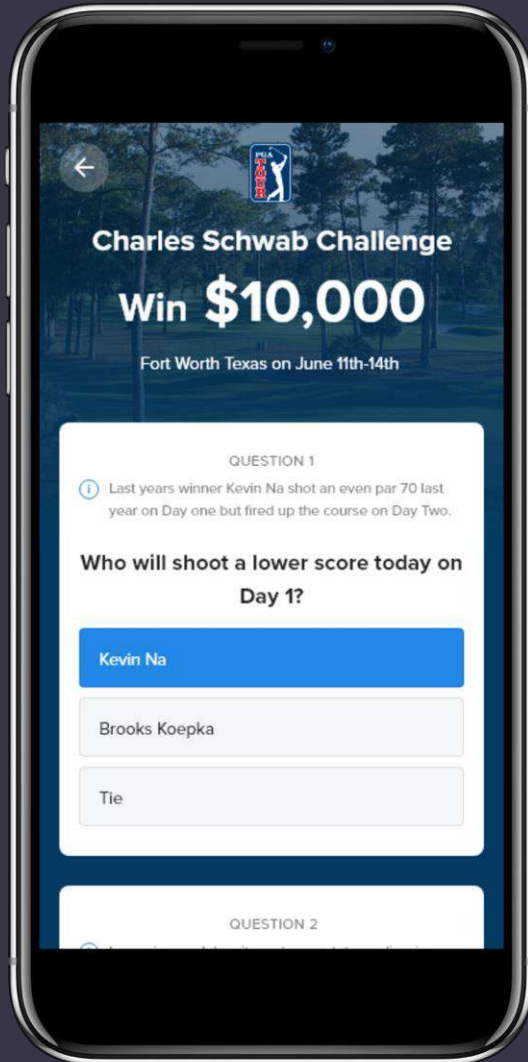
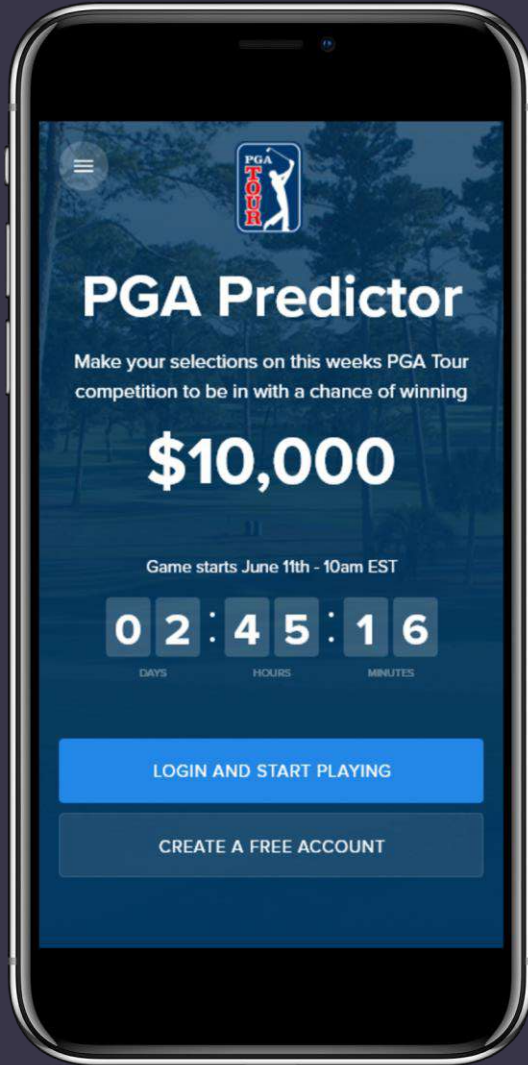
- BetMGM offer a daily Quiz, based on historical events or fact-based trivia
- FanDuel are asking questions on events as disparate as Top Chef, the weather, WWE Smackdown and Shark Tank
- Daily returning players on these games average over 60%
- Over 40% of daily players have played in all of the past 4 days





ESPORTS EVENTS

- The SportCaller platform allows our clients to easily and quickly spin up games on any events that are ongoing
- Both FanDuel and BetMGM targeted the inaugural NBA 2K Players Tournament, one with a bracket on the entire competition and one with a daily game
- FanDuel opened their game countrywide, with dual DFS and Sportsbook registration and login





FIND OUT MORE

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