
Grant Hinchcliffe
TIR CEO

TASMANIAN INDEPENDENT RETAILERS UPDATE

TIR Channel Meeting



TIR UPDATE

Grant Hinchcliffe, TIR CEO

- Group Sales Performance & KPIs – YTD FY21 & FY22 Forecast
- Member / IGA Rebate Distribution – FY21
- Member Engagement Plans & Communication Improvements

Gary Sutherland , TIR Head of Promotions, Special Projects & Insights

- TIR Strategic Plan – Progress And Achievements To Date

Travis Allen, TIR Head of Marketing

- Digital Platform Developments - Sneak Peek At The New Retailer Zone Website.

Peter Martin, TIR Head of Safety, Health & Environment

- Safety Culture & Environment – How TIR Plans To Assist Members In This Vital Area.



GROUP SALES PERFORMANCE & KPIS OVERVIEW



Performance

- SIW Group Purchases
 - Dollars, Volume, Gross Profit Dollars
- Direct Supplier Accounts
- Member Retail Sales
- Rebates



Drivers

- COVID-19 Impact
 - Shop Local
- Market Share growth towards Independents
- Improved Price Perception
- Member Investment in Stores

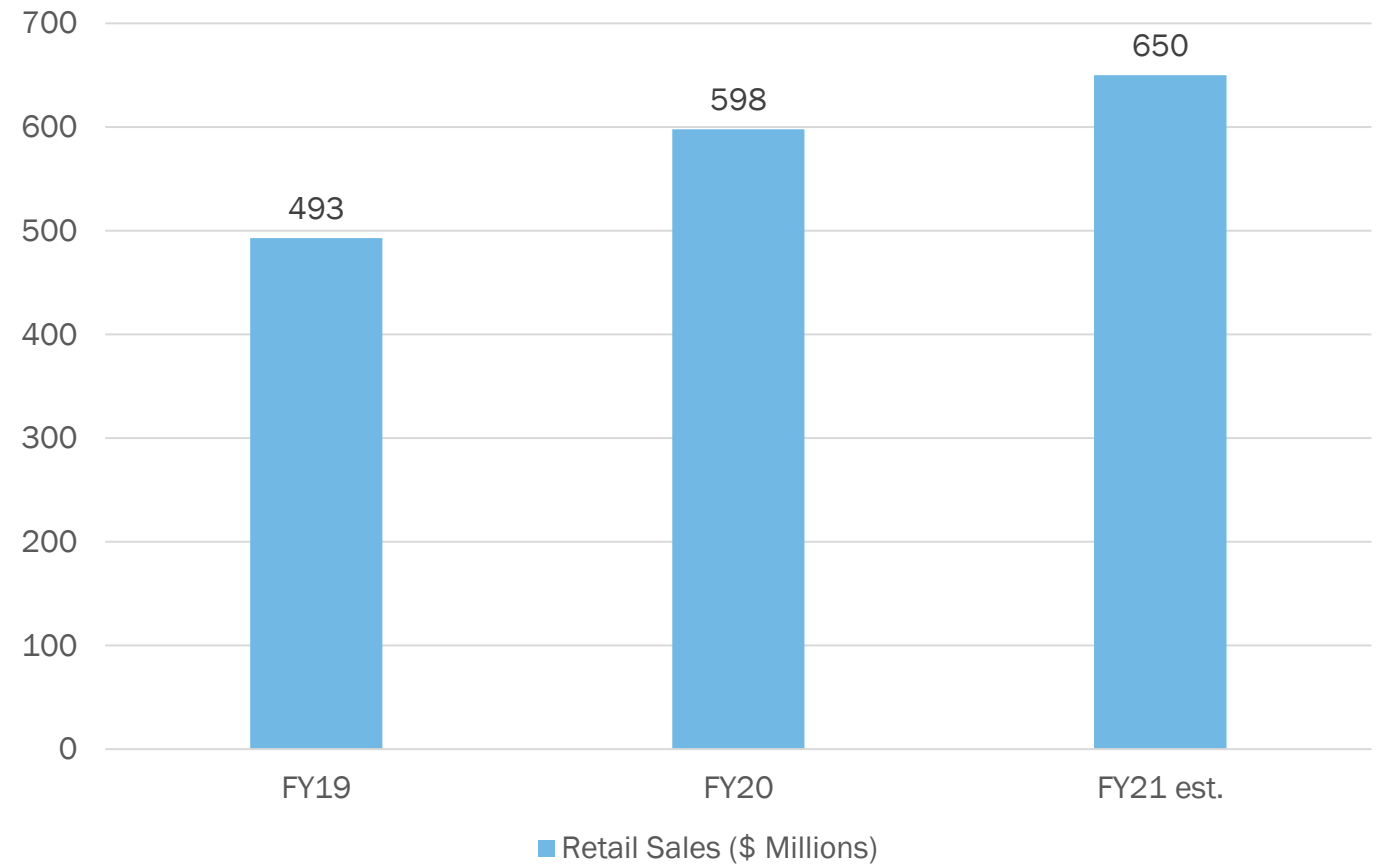
TASMANIAN MARKET PERFORMANCE

TIR's Market share

FY 20 Approx.

18.5%

Retail Sales (\$ Millions)



THE COVID-19 BOUNCE

- Member Upside
- Member Challenges
- Member Opportunities



SIW GROUP \$ PURCHASES 5 YEAR TREND

5 Year Growth

Grocery

+29 \$Million

+30.65%

Cigarettes

+68 \$Million

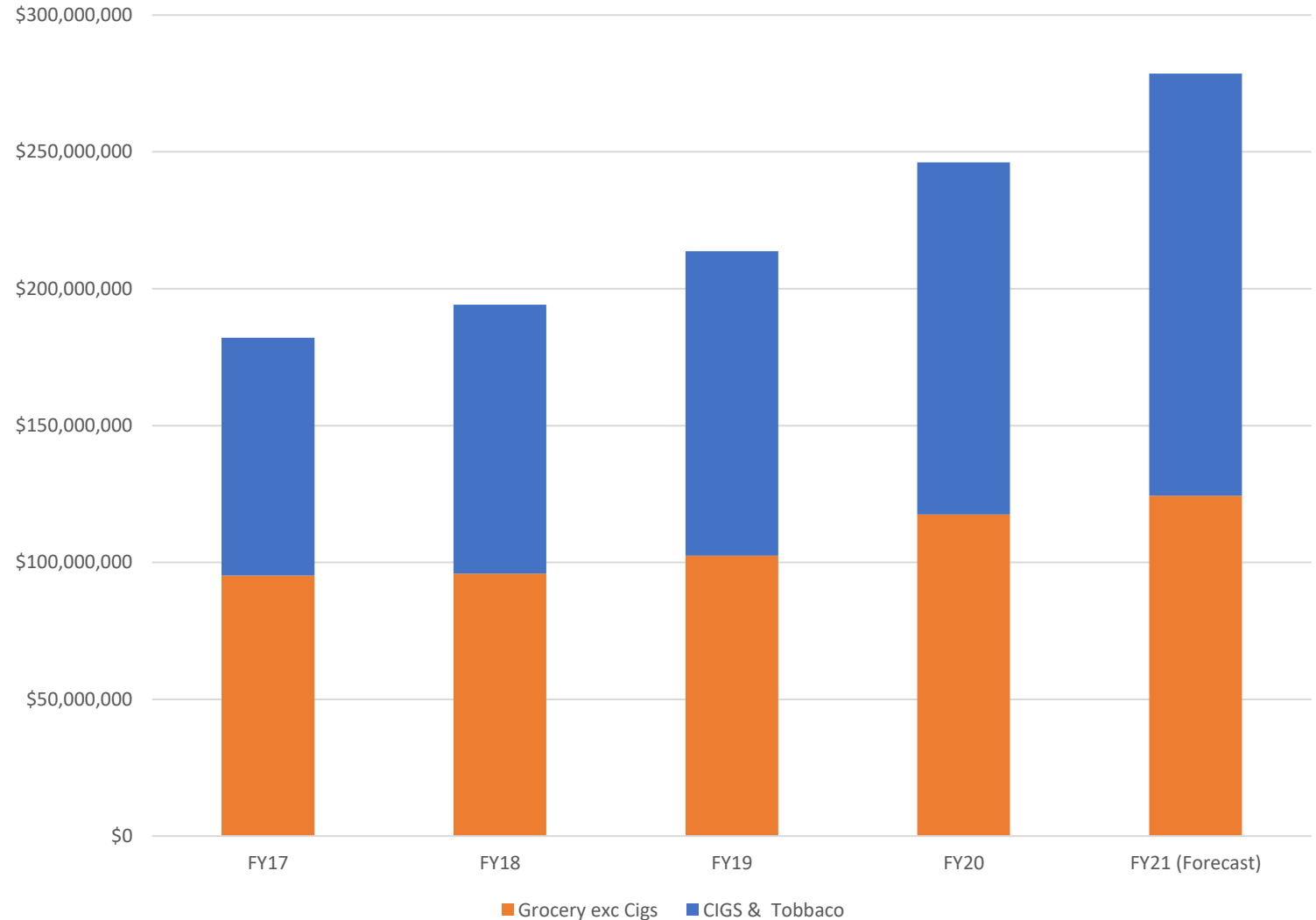
+77.42%

Total

+97 \$Million

+52.97%

TIR 5 Year \$ Purchases Growth



SIW GROUP VOLUME 5 YEAR TREND

5 Year Growth

Grocery

+1.1 Million Cases

+26.50%

Cigarettes

+55 Thousand Cases

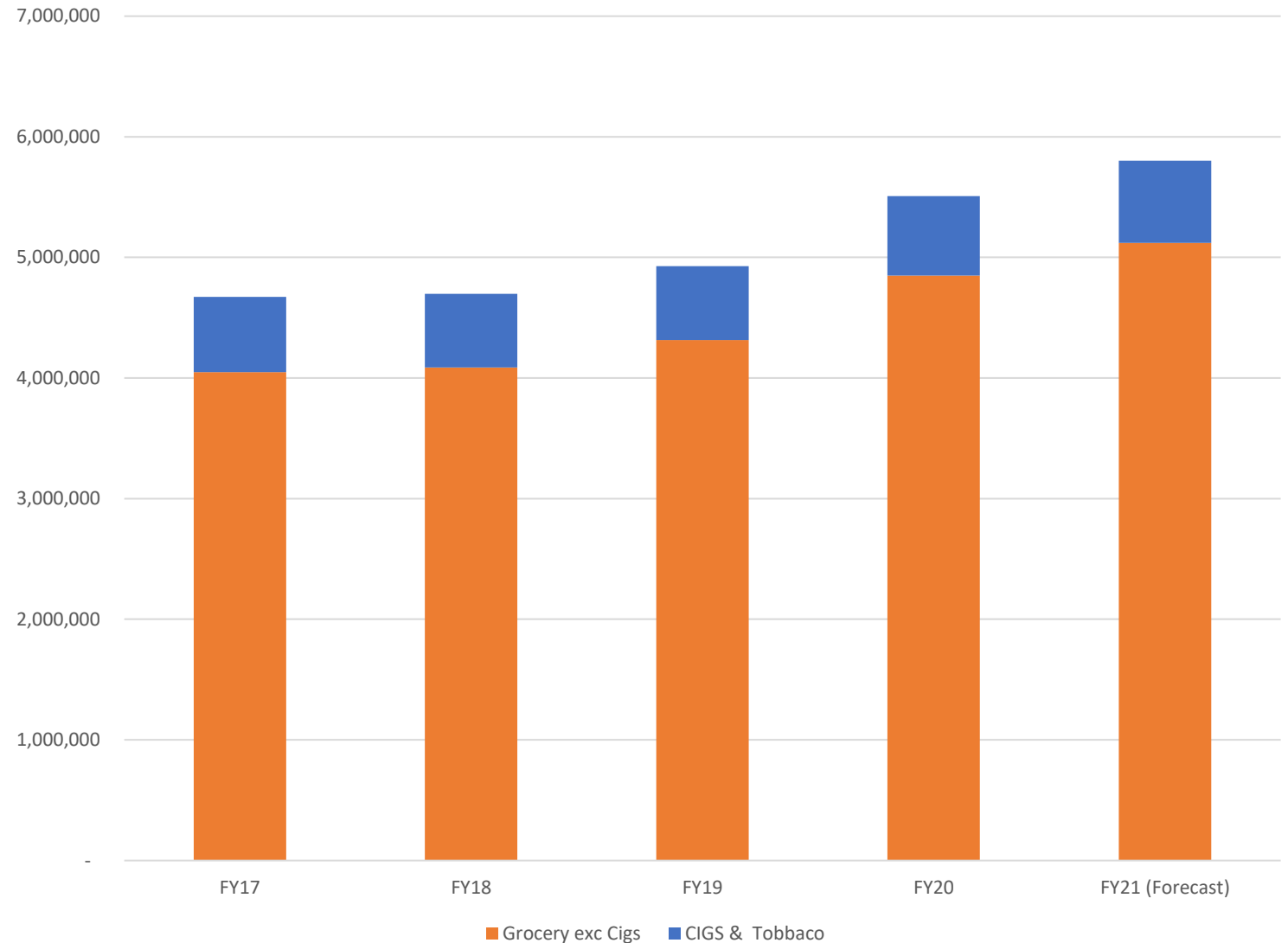
+ 8.78%

Total

+1.15 Million Cases

+24.13%

TIR 5 Year Dollar Volume Growth



SIW GROSS PROFIT DOLLARS 5 YEAR TREND

5 Year Growth

Grocery

+9.6 \$Million

+41.24%

Cigarettes

+6.3 \$Million

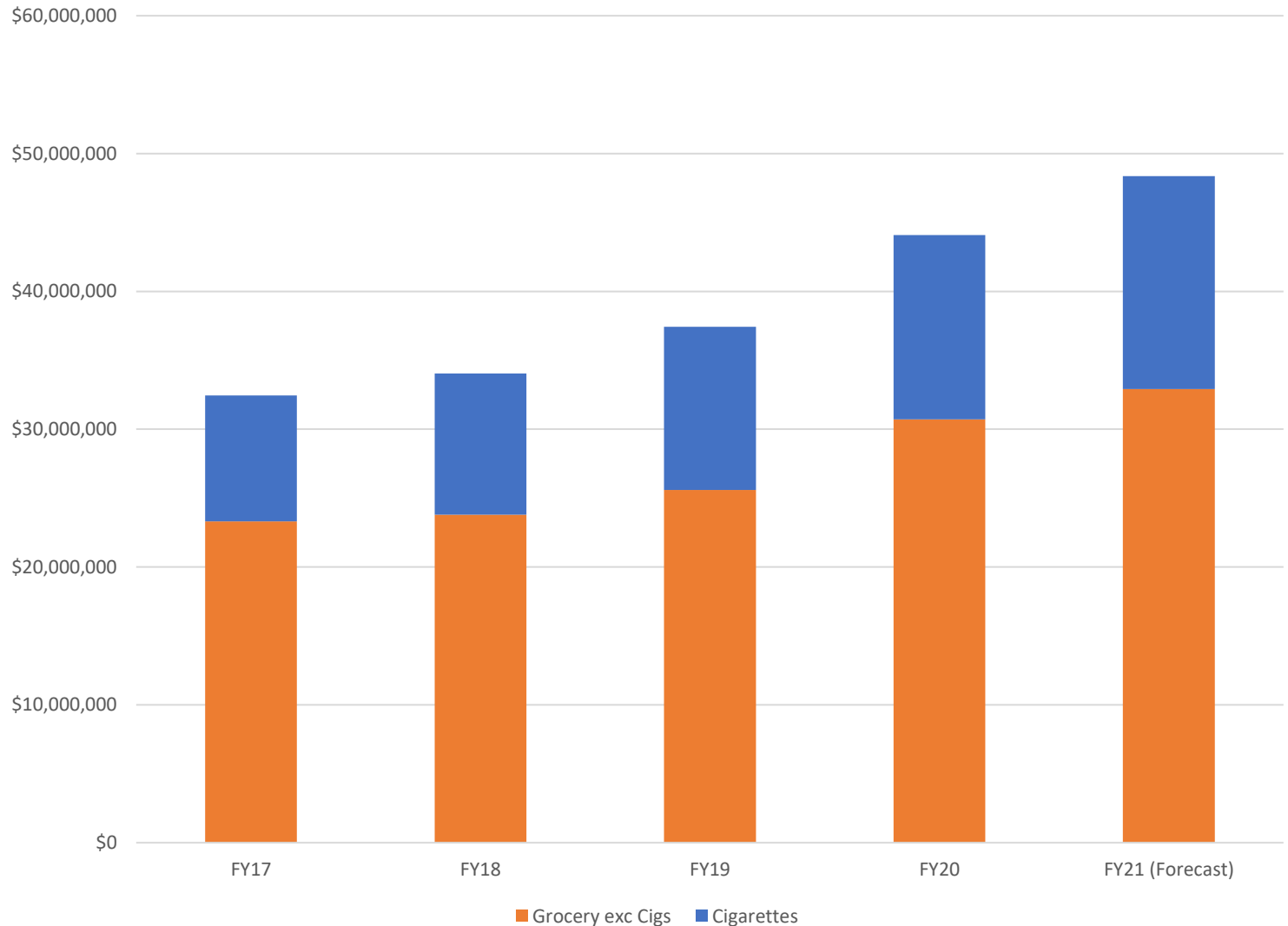
+68.89%

Total

+15.9 \$Million

+49.03%

TIR 5 Year Gross Profit Dollars Growth



SIW GROUP \$ PURCHASES 5 YEAR TREND BY CATEGORY

5 Year Growth

Dry Grocery

+17.85%

Temp Control

+48.06%

Convenience

+40.32%

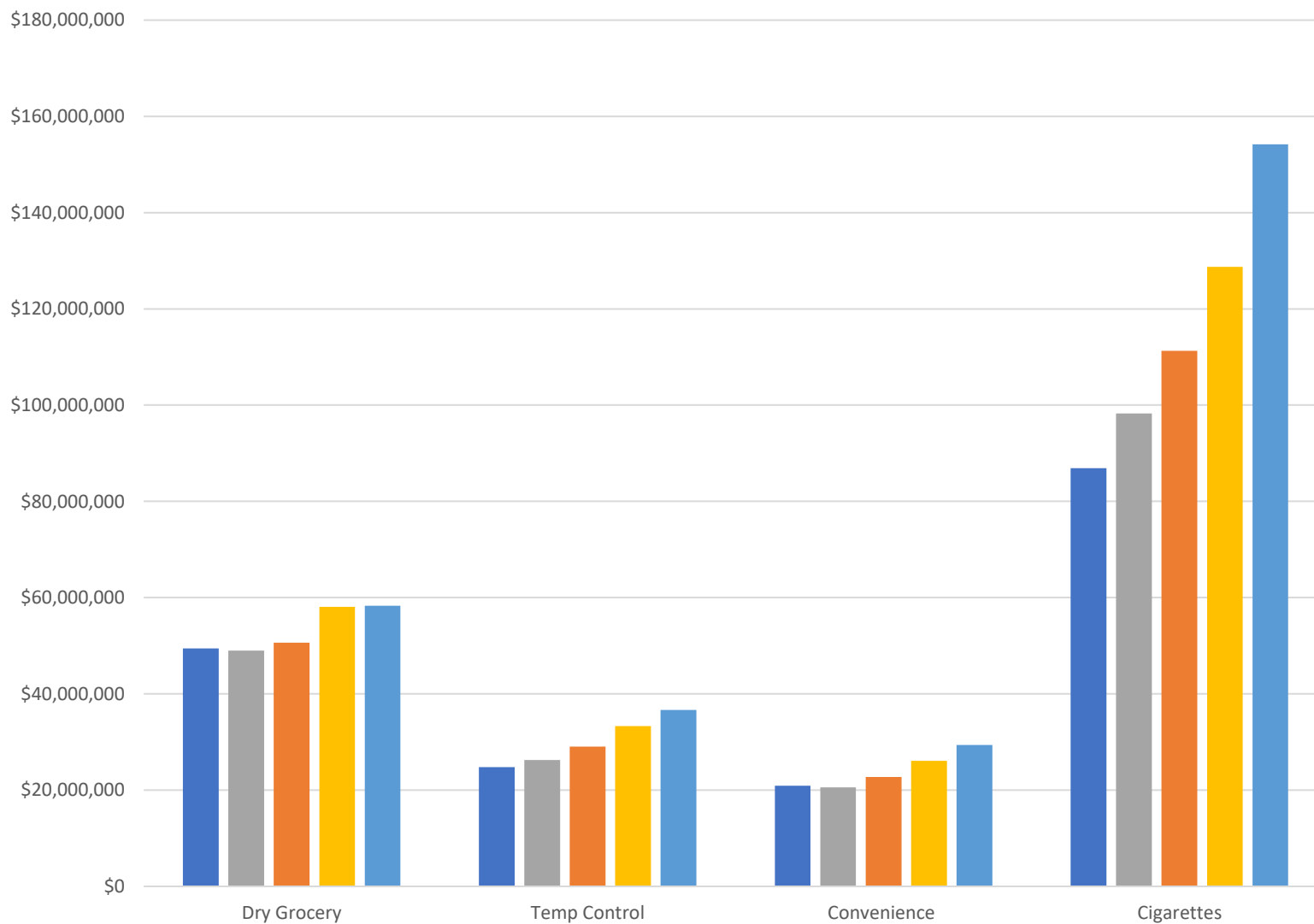
Cigarettes

+77.42%

Total

+52.97%

5 Year Purchase \$ Trend by Category



SIW GROUP VOLUME 5 YEAR TREND BY CATEGORY

5 Year Growth

Dry Grocery

+14.57%

Temp Control

+42.62%

Convenience

+40.26%

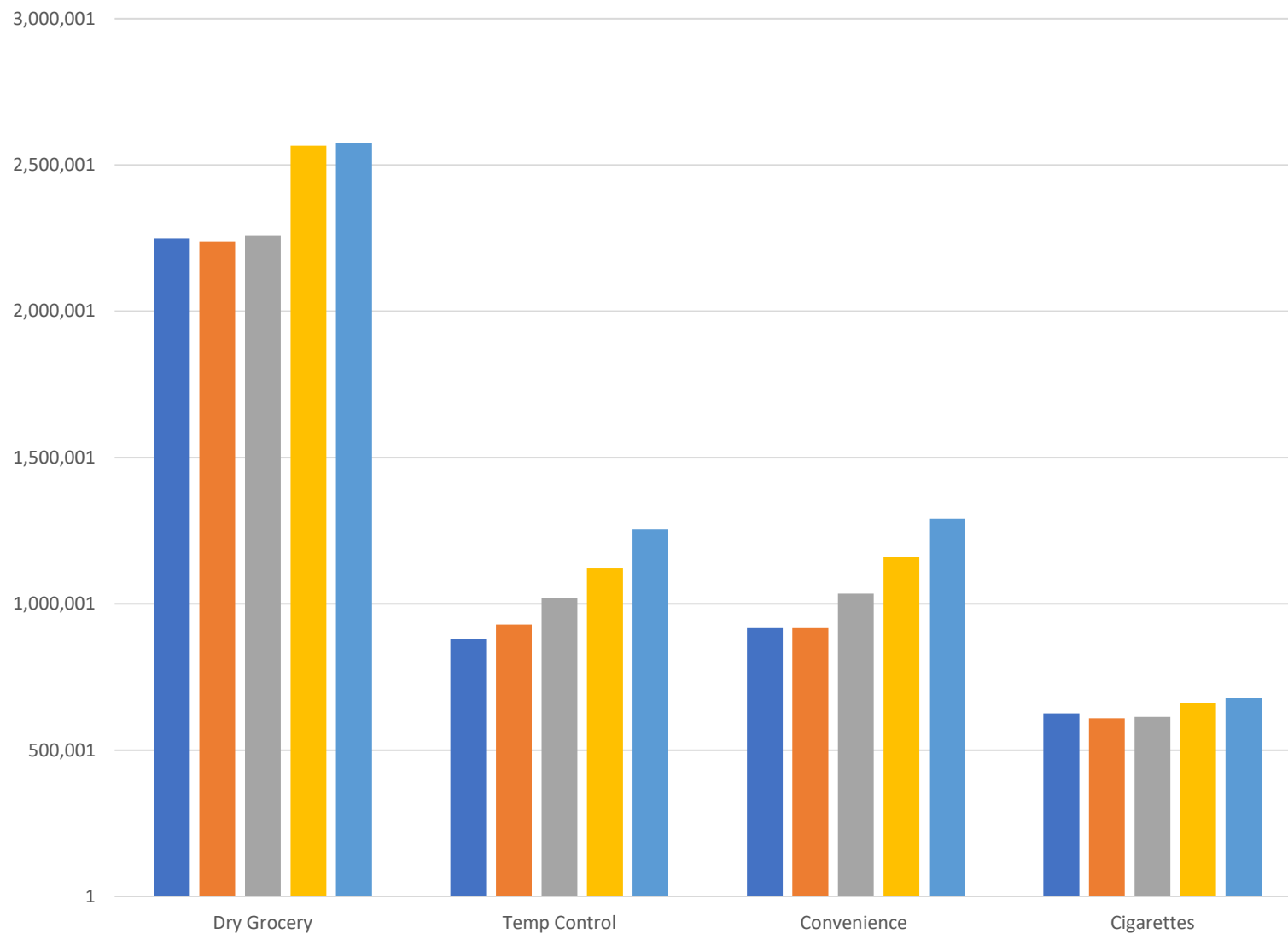
Cigarettes

+8.78%

Total

+24.13%

5 Year Volume Trend by Category



SIW GROSS PROFIT DOLLARS 5 YEAR TREND BY CATEGORY

5 Year Growth

Dry Grocery

+24.27%

Temp Control

+65.23%

Convenience

+56.34%

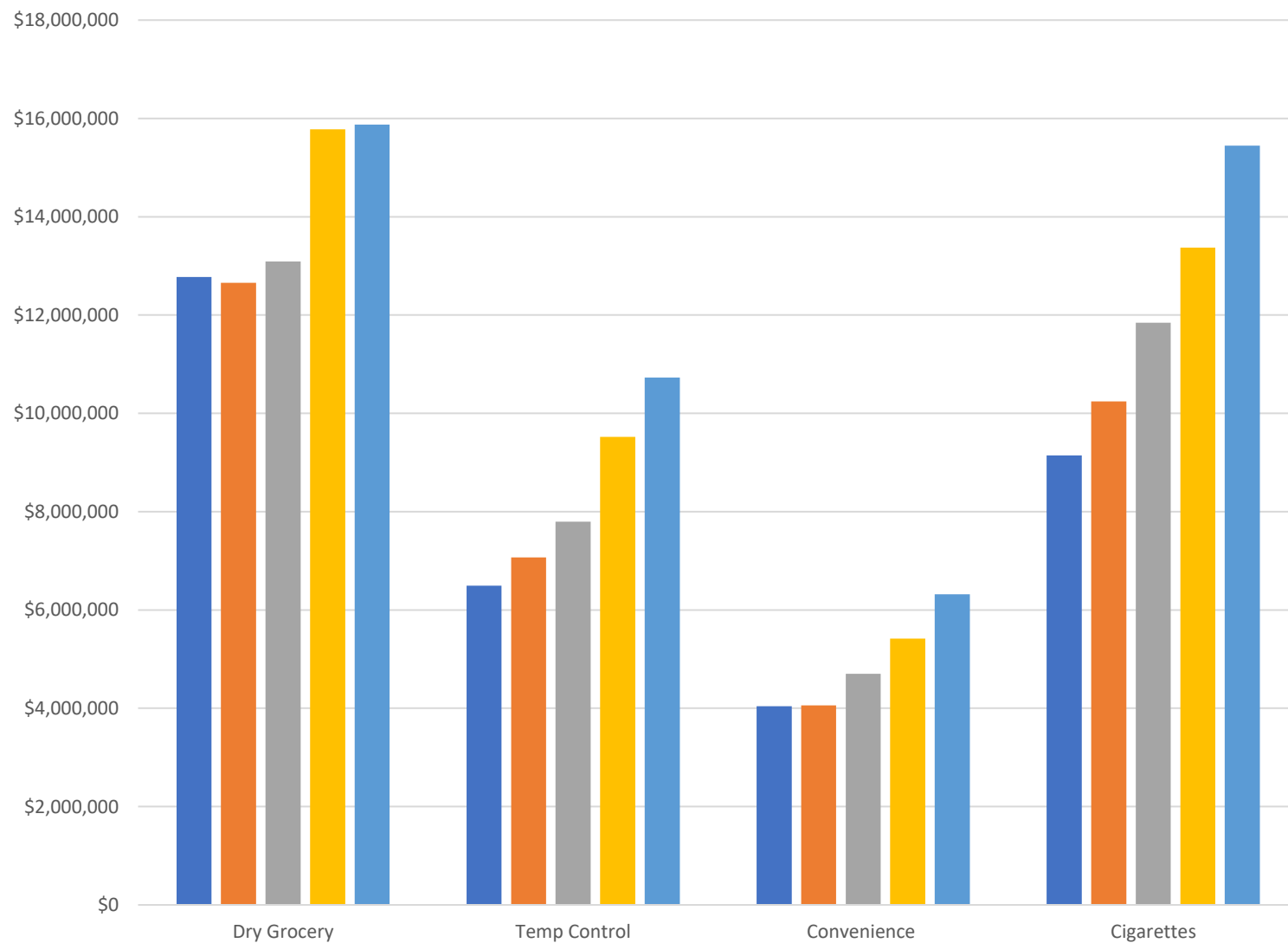
Cigarettes

+68.89%

Total

+49.03%

5 Year GP\$ Trend by Category



AVERAGE MEMBER SIW VOLUME GROWTH

FY19 VS. FY21

FY20 VS. FY21

FY19 vs FY21			
Volume Growth Factor	Number of Stores	Ave Vol Growth % vs FY19	Average Sales Growth vs FY19
20%+	27	37.20%	53.32%
Double Digit Growth	36	15.09%	24.69%
Single Digit Growth	15	6.61%	14.64%
Negative Growth	7	-7.78%	1.15%
Grand Total	85	18.73%	30.07%

FY20 vs FY21			
Volume Growth Factor	Number of Stores	Ave Vol Growth % vs FY20	Average Sales Growth vs FY20
20%+	8	25.51%	33.34%
Double Digit Growth	10	14.04%	23.26%
Single Digit Growth	47	4.83%	11.18%
Negative Growth	20	-2.44%	3.15%
Grand Total	85	6.15%	12.80%

Forecast for FY22 is steady but cautious

MEMBER / IGA REBATE DISTRIBUTION FY21 & FORECAST FY22

Rebate % Rates –FY 21 As Previously Advised and Forecasted for FY22

Rebatable Purchases	PIP	EDF	Total
SIW	@ 3.00%	0.50%	3.50%
IFP	@ 2.00%	0.50%	2.50%
TIR CT	@ 2.50%	0.50%	3.00%

Rebate % Rates – Applied to the FY21 Rebate Distribution

Rebatable Purchases	PIP	EDF	Total
SIW	@ 3.75% (+0.75%)	0.75% (+0.25%)	4.50% (+1.00%)
IFP	@ 2.00%	0.75% (+0.25%)	2.75% (+0.25%)
TIR CT	@ 2.50%	0.75% (+0.25%)	3.25% (+0.25%)

	FY17	FY18	FY19	FY20	FY21 (Forecast)
Total Rebates Distributed	5,282,645	5,325,676	5,459,157	6,578,755	8,096,492
\$ Variation on LY		43,031	133,481	1,119,598	1,517,737
% Variaiton on LY		0.81%	2.51%	20.51%	23.07%
\$ Variation - FY17 vs. FY21					2,813,847
% Variation - FY17 vs. FY21					53%

FY21 REBATE \$ DISTRIBUTIONS KEY HIGHLIGHTS

- Significant increase for FY17 vs. FY21
- FY20 & FY21 are the key standout
 - \$ Growth @ +20.51% & 23.07% respectively
- The FY21 also includes a special distribution from SIW in December 2020
 - Redistributed in full back to all members.
 - We do not expect a further distribution in December 2021.

MEMBER ENGAGEMENT PLANS & COMMUNICATION IMPROVEMENTS

- Feedback on Engagement and Communication has been mixed.
- Survey results indicate that member engagement is down and desire to meet and network again.
- Covid-19 communication was well received.
- Daily IGA E-mail opening rates are up.

MEMBER ENGAGEMENT ACTIONS

- IGA Channel Meetings
 - Confirmation of twice per year
- IGA State Conference - May 2-5, 2022
 - Confirmation of next year's State Conference and Study Tour , Sunshine Coast , Queensland
 - Accommodation in Noosa, will also incorporate the Awards of Excellence Dinner in 2022.
 - Consideration of local Conference every second year
- New Retailer and Customer Website
 - Central Hub of information
- Engagement and Communications Improvement Plan

COMMUNICATIONS

CURRENT

Daily IGA Update Emails

(Revamp currently being designed)

- Merchandising Bulletins
- Promotions Updates
- Member Services Updates
- IFP and Produce Features

Chairman and CEO Updates

- will continue as required

- Will also available on the Retailer Zone Website

TIR Annual Report issued each October

(prior to the TIR AGM)

- Will also available on the Retailer Zone Website

COMMUNICATIONS

NEW

Information	Frequency	Author	Content
Safety Health & Environment (SHE)	Weekly	Peter Martin	SHE matters of interest, relevant links etc. This will be more of an awareness & education building platform.
Group Sales KPI's	Monthly	Gary Sutherland Grant Hinchcliffe	Matters & progress relevant to the 2020-2023 TIR Group Strategic Plan.
Information Technology & Communications (ITC)	Monthly	Glenn Rainsford	Targeted messaging around selected ITC related matters.
Strategy	Quarterly	Gary Sutherland	Matters & progress relevant to the 2020-2023 TIR Group Strategic Plan.
Members Services Development	Monthly	Craig Smith	Brief overview of the development work undertaken and feedback from Members around the work undertaken and the benefits attained.