Player trends are sometimes hard to clarify, identify and most importantly - measure. If our population is getting older (*hint:* it is[1]), then shouldn't the membership base of Clubs also get older? While this is true from a basic statistical view, the average age of engaged gaming patrons in Clubs is climbing faster than the national average rate.

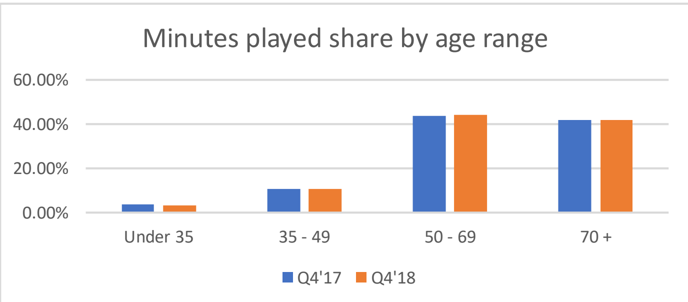
Looking at period vs period data for Q4 2017 and 2018, the goal is to look at what trends have appeared year on year. AstuteBI has data for over 200 million minutes played in the NSW Clubs market for both periods making it statistically significant[2]. Breaking this down by age range and turnover per daily session, we can illustrate the distribution of those numbers by player value (ADT per day), and age range. Based on the tables below, the 50-69 and 70+ age groups combined to represent over 85% of all minutes played in both periods, while ADT under $2,500 per day is over 81% in both periods.

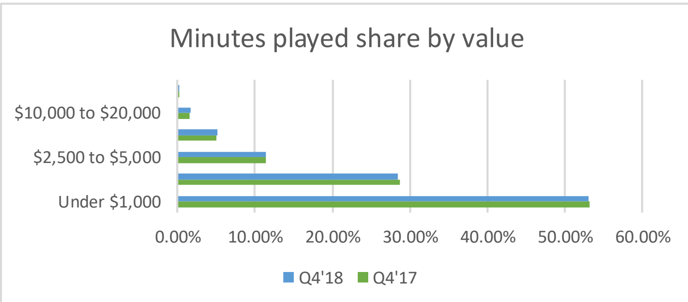
Age Range	Under $1,000	$1,000 to $2,500	$2,500 to $5,000	$5,000 to $10,000	$10,000 to $20,000	Over $20k	Total
Under 35	1.82%	0.85%	0.38%	0.19%	0.07%	0.02%	3.33%
35 - 49	3.66%	3.27%	1.90%	1.23%	0.46%	0.09%	10.62%
50 - 69	17.85%	15.14%	6.98%	3.06%	0.97%	0.12%	44.12%
70 +	29.73%	9.15%	2.20%	0.72%	0.13%	0.01%	41.93%
Q4 2018	53.06%	28.41%	11.46%	5.20%	1.63%	0.24%	**100%**

Age Range	Under $1,000	$1,000 to $2,500	$2,500 to $5,000	$5,000 to $10,000	$10,000 to $20,000	Over $20k	Total
Under 35	1.81%	0.90%	0.44%	0.21%	0.11%	0.01%	3.48%
35 - 49	3.76%	3.47%	1.91%	1.18%	0.43%	0.06%	10.81%
50 - 69	17.72%	15.27%	6.95%	3.00%	0.86%	0.12%	43.91%
70 +	29.89%	9.08%	2.05%	0.63%	0.14%	0.01%	41.80%
Q4 2017	53.17%	28.72%	11.35%	5.02%	1.54%	0.19%	**100%**

[Legend: red indicates the most popular, blue the least popular with white in the middle and shades of red and blue either side]

Graphically, the change in share by each age range from 2017 to 2018 rises marginally year on year for the '50-69' and '70+' age cohorts. This movement has been a constant with previous RCA research (August 2018 – 'Demographic Contribution Trends') showing a noticeable movement from the '50-69' bracket to the '70+' bracket with little change in those under 50. While the time frame between periods is short, there are 2 observations worth noting; (1) the higher brackets are on the rise (over $2,500) and the age bracket creep is real as under 50 representation declined period vs period.





Conclusion: Club performance largely plateaued in 2018 as growth struggled to reach an average of 1% over the 12-month period while Pubs were in excess of 7%. With the '50-69' age bracket being the most important for Clubs, the 'aging' of the Club patron would infer that the appeal for Pubs is getting wider….and older. Family friendly, good food, secure and clean were not words associated with most Pubs at the turn of the decade. The game has changed and changing landscape would indicate the competitive battle is for the 40-50 age bracket, not the under 40's crowd.

[1] https://www.aihw.gov.au/reports/older-people/older-australia-at-a-glance/contents/demographics-of-older-australians/australia-s-changing-age-and-gender-profile
[2] https://measuringu.com/statistically-significant/

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INFLECTION POINT – OPINION PIECE

DEFINING THE PLAYER EXPERIENCE – *By Terry O'Halloran*

I read Bill Friedman's book on Gaming room design in 2009 upon my return to Australia. A ponderous tome of well over 600 pages, it was steeped in practical research which is great, but it was dated then and is even less relevant now. Trends often change because of larger changes in society, not just those related to product. For NSW Clubs, continued social stigmatisation of Gaming is as much of a threat as the improving Pub market. For all my data-based research, I have spent little time noting my thoughts on the big differentiator – the player experience. I have done several projects over the last 6 months looking at what the 'Player Experience' means and then how to enunciate it. Below are listed 6 of the top assessment points to see where your offering stacks up;

1. It starts at the car park – clear signage, well lit, a feeling of safety and a clean presence are the pillars of how a car park should be designed and maintained. As it is almost always the first point of contact for patrons, this is how first impressions can be positively formed.
2. The three Cs – (1) cleanliness almost always rates near the top in any hospitality survey, it is super-important (2) car parking is vital because the Club's prime target market (50-69) drive, especially at night and this forms part of the decision-making process, and (3) coffee; the national consumption continues to rise as do the number of outlets. Coffee is important to the committed player in 2019.
3. Customer service – over the years I have spent time watching floor staff interacting with top players. I believe the best staff are the ones who are industrious, are 'invisible' until needed and are time conscious. I see many Customer Service staff still over stay their welcome and not take the obvious visual cue that the engagement is over.
4. Base line technology – Card based systems offering TITO ~~or~~ **and** Cashless is a must in 2018. High end players preferences aren't black and white, they can be grey. Many Clubs run TITO but offer cashless to top tiers as a service – as all current systems have that functionality approved, Clubs should ensure players have options, especially when it comes to money.
5. Comfort – I understand the need for consistency in obtaining aesthetic pleasure, but I still think multiple chair options and base heights can't hurt the performance of a Gaming room.
6. Privacy not seclusion – the UNLV Centre of Research has put so much work into this I am not going to rehash it but having small secluded or differentiated gaming areas does not work. Privacy can be achieved in a crowded area.

Assessing your gaming offering is only part of the equation, knowing and honestly assessing the competition completes the process. Put yourself in your players shoes and understand what they really want, not what was written in a book in a different era.

DECEMBER 2018 GAME PERFORMANCE – games released in last 12 months, sample of 5+ units

NSW

Game Name	Manufacturer	Avg. vs Floor	Sample
EYES OF FORTUNE LC	Aristocrat	2.62	15
GENGHIS KHAN DL	Aristocrat	2.58	53
GENGHIS KHAN DC	Aristocrat	2.54	22
MAGIC TOTEM LL	Aristocrat	2.45	24
PEACE & LONG LIFE DL	Aristocrat	2.43	48
PEACE & LONG LIFE DC	Aristocrat	2.12	34
EYES OF FORTUNE LL	Aristocrat	2.08	22
MAGIC TOTEM LC	Aristocrat	2.03	25
DOUBLE SHOT ZODIAC	Ainsworth	1.91	8
SPRING FESTIVAL DC	Aristocrat	1.73	95

QUEENSLAND

Game Name	Manufacturer	Avg. vs Floor	Sample
GENGHIS KHAN DC	Aristocrat	2.87	8
GENGHIS KHAN DL	Aristocrat	2.40	115
PEACE & LONG LIFE DL	Aristocrat	2.15	97
DYNAMITE DOLLARS ALL ABOARD	Konami	1.98	33
PEACE & LONG LIFE DC	Aristocrat	1.86	14
DANCING DRAGONS ALL ABOARD	Konami	1.75	28
MAGIC TOTEM LC	Aristocrat	1.71	14
WELCOME TO FANTASTIC JACKPOTS	Aristocrat	1.70	127
MIGHTY COINS MIGHTY DRAGON	Aristocrat	1.69	5
GENGHIS KHAN	Aristocrat	1.64	15

If Loyalty costs and RTP retention are an issue at your venue, a review for less than $2,500 could be the solution to getting things back on track. Contact Terry O'Halloran on 0426 468 738 or terry.ohalloran@russellcorporate.com.au to discuss your options.