



**GAMING
MANAGEMENT
DEVELOPMENT COURSE**

EGM ANALYSIS

Occupancy and Benchmarking

May 2022

Sustainability?



RISK AWARENESS


risk

/rɪsk/ 

noun

1. a situation involving exposure to danger.
"flouting the law was too much of a risk"
synonyms: possibility, chance, probability, likelihood, danger, peril, threat, menace, fear, prospect
"do not use the stove inside a tent because of the risk of fire"

awareness

/əˈweɪ.nəs/ 

noun

- knowledge or perception of a situation or fact.
"we need to raise public awareness of the issue"
synonyms: consciousness, recognition, realization, cognizance, perception, apprehension, understanding, grasp, appreciation; [More](#)
- concern about and well-informed interest in a particular situation or development.
"a growing environmental awareness"

Who is responsible for Risk Management ?



By understanding your Product Mix you can actively manage the risk on your gaming floor

Aim: To maintain a “Balanced Installation”

In broad terms...

Install % : T/over % : Net %



However

Via an increased knowledge in how to analyse your gaming floor to fully cater your players; will assist in making informed decisions and...



Drive the bottom line by

- Understanding what your players are telling you
- Understanding what your players want
- Make more informed decisions – Age, model, product, brands, percentages
- What works for your venue - What demographics do you have?
- Do you have the right mix - Manufacturer, Denomination, premium product
- Work from a benchmark - starting point to measure future results
- Understand your Return on Investment - How long to get my money back, did my conversion and new purchases work?
- Make your gaming investment work for you - New vs. Conversions
- Don't just go with overall manufacturer and denomination report or the bottom 10% of popularity report
- Gaming is only one part of the business. To increase business need to understand impact in other areas



Exercise 1 – Assume ‘As Typical’ – Your Observations/Recommendations

Contribution Analysis for Club GMDC; by denom & 'link'

Denom	No. of Units	T/O	Net	Exp % Hold	Act % Hold	Hold % Var	Install	T/O	Net
1c (Standalone)	31	804571	77395	11.13	9.62	-1.51	38.75	42.27	42.31
1c (Links)	22	524848	54568	9.70	10.40	0.70	27.50	27.57	29.83
2c	6	132688	14684	10.44	11.07	0.63	7.50	6.97	8.03
5c	4	90572	10185	10.70	11.25	0.55	5.00	4.76	5.57
10c	8	130722	11454	9.10	8.76	-0.34	10.00	6.87	6.26
\$1	9	220158	14621	9.05	6.64	-2.41	11.25	11.57	7.99
Total	80	1903559	182907	10.30	9.61	-0.69	100	100	100

Link	No. of Units	T/O	Net	Exp % Hold	Act % Hold	Hold % Var	Install	T/O	Net
Non-Link	54	1296618	123129	10.78	9.50	-1.28	67.50	68.12	67.32
Maximillion	3	113539	15683	9.70	13.81	4.11	3.75	5.96	8.57
Big Catch	8	195648	18864	9.77	9.64	-0.13	10.00	10.28	10.31
Wheel of Winners	5	113833	10803	7.91	9.49	1.58	6.25	5.98	5.91
Treasure Trove	6	101828	9218	11.13	9.05	-2.08	7.50	5.35	5.04
Vegas	4	82093	5210	8.04	6.35	-1.69	5.00	4.31	2.85
Total	80	1903559	182907	10.30	9.61	-0.69	100	100	100

Contribution Analysis – Exercise 2

(a) complete monthly contribution analysis by denomination

Denom.	No of units	T/over \$'000s	Net \$'000's	Install %	T/over %	Net %	Exp. %	Act %	Var. to Exp.
1c	60	3,442	362				10.00		
2c	25	1,301	117				9.50		
5c	30	1,666	157				9.00		
10c	10	508	33				8.55		
\$1	25	1,512	143				7.15		
TOTAL	150						9.15		

b) complete monthly contribution analysis by link – compare “link to link”

Bank	No. of Units	T/over \$'000s	Net \$'000s	Install %	T/over %	Net %	Exp. %	Act %	Var. to Exp.
A	24	1,148	104				9.22		
B	22	972	86				9.00		
C	16	872	79				8.90		
D	12	847	82				9.00		
E	10	693	61				7.99		
TOTAL	84						8.92		

Contribution Analysis Exercise II – ‘Answer’

(a)

Denom	EGMS	Turnover	Net	Install %	Turnover %	Net %	Exp %	Act %	Var	Var in Money
1	60	\$ 3,442,000	\$ 362,000	40.00%	40.84%	44.58%	10.00%	10.52%	0.52%	\$ 17,800
2	25	\$ 1,301,000	\$ 117,000	16.67%	15.43%	14.41%	9.50%	8.99%	-0.51%	-\$ 6,595
5	30	\$ 1,666,000	\$ 157,000	20.00%	19.77%	19.33%	9.00%	9.42%	0.42%	\$ 7,060
10	10	\$ 508,000	\$ 33,000	6.67%	6.03%	4.06%	8.55%	6.50%	-2.05%	-\$ 10,434
100	25	\$ 1,512,000	\$ 143,000	16.67%	17.94%	17.61%	7.15%	9.46%	2.31%	\$ 34,892
TOTAL	150	\$ 8,429,000	\$ 812,000	100%	100%	100%	9.15%	9.63%	0.48%	\$ 40,747

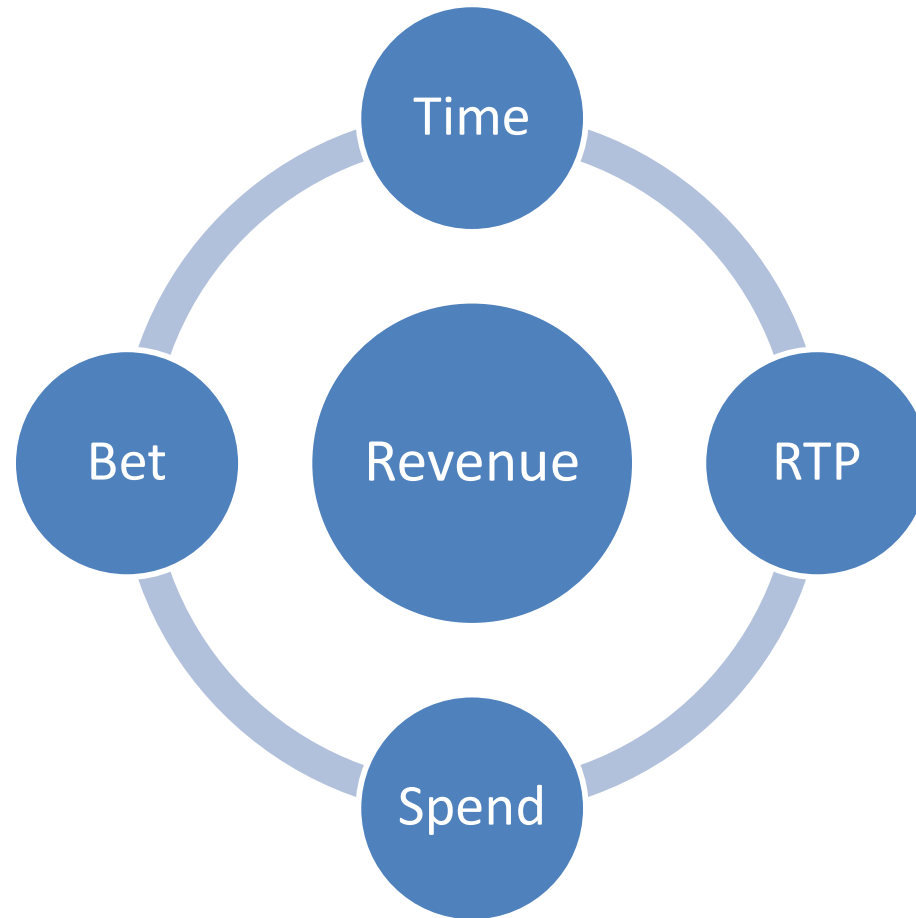
(b)

Link	EGMS	Turnover	Net	Install %	Turnover %	Net %	Exp %	Act %	Var	Var in Money
A	24	\$ 1,148,000	\$ 104,000	28.57%	25.33%	25.24%	9.22%	9.06%	-0.16%	-\$ 1,846
B	22	\$ 972,000	\$ 86,000	26.19%	21.45%	20.87%	9.00%	8.85%	-0.15%	-\$ 1,480
C	16	\$ 872,000	\$ 79,000	19.05%	19.24%	19.17%	8.90%	9.06%	0.16%	\$ 1,392
D	12	\$ 847,000	\$ 82,000	14.29%	18.69%	19.90%	9.00%	9.68%	0.68%	\$ 5,770
E	10	\$ 693,000	\$ 61,000	11.90%	15.29%	14.81%	7.99%	8.80%	0.81%	\$ 5,629
TOTAL	84	\$ 4,532,000	\$ 412,000	100%	100%	100%	8.92%	9.09%	0.17%	\$ 7,746

Comparison

	EGMS	Turnover	Net	Install %	Turnover %	Net %	Exp %	Act %	Var	Var in Money
Linked	84	\$ 4,532,000	\$ 412,000	56.00%	53.77%	50.74%	8.92%	9.09%	0.17%	\$ 7,746
Non Link	66	\$ 3,897,000	\$ 400,000	44.00%	46.23%	49.26%	9.38%	10.26%	0.88%	\$ 34,461
TOTAL	150	\$ 8,429,000	\$ 812,000	100%	100%	100%	9.15%	9.63%	0.48%	\$ 40,747

The Magic Circle



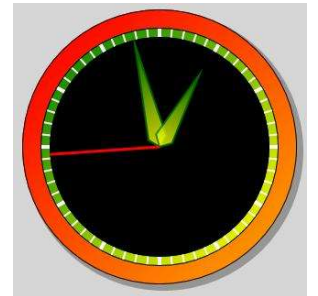
EGM Occupancy

- Inputs
 - Games played
 - RTP %
 - Average bet
 - Average time per game played
 - Venue trading hours



EGM Occupancy

- The generally accepted maximum number of games played is 500 per hour (7.2 seconds) on average.
- Individual venues can +/- this game play rate based on their experience.



EGM Occupancy

- Occupancy calculation
- No games played x 7.2 seconds
- 3,000 games x 7.2 = 21,600 seconds
= 360 minutes
= 6 hours
- Venue trades for 18 hours
- Occupancy = 33.3%



EGM Occupancy

- So what's the big deal?
- Is it possible that a venue could install additional games that are only earning 80% of the floor average?
- Is it possible that a venue would not install additional games that are earning $> 120\%$ of the floor average?



EGM Occupancy

- Feature Games (SAP's) Multi Denomination
- Hold 5%
- Bet structure Multi Line (Vary)
- Avg. bet 70c
- Net win \$250 per day.
- Turnover \$5,000 per day
- Games 7140 per day
- **14 hours 35 minutes**



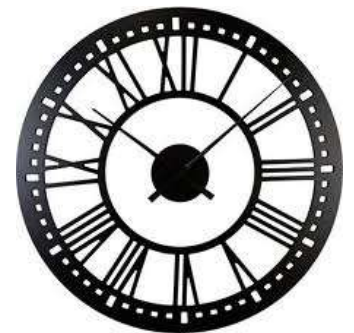
EGM Occupancy

- Standard game 10c
- Hold 9%
- Bet structure 20 L
- Avg. bet \$1.20
- Net win \$250 per day
- Turnover \$2,775 per day
- Games 2,310 per day
- **4 hours 30 minutes**



EGM Occupancy

- Dollar (\$) game
- Hold 7.5%
- Bet structure 5L
- Avg. bet \$3.50
- Net win \$250 per day
- Turnover \$3,333 per day
- Games 950 per day
- **1 hour 51 minutes**



EGM Occupancy

- Standard Game 1c
- Hold 13%
- Bet structure 25 Line
- Avg. bet 70c
- Net win \$250 per day
- Turnover \$1,925 per day
- Games 2,750 per day
- **5 hours 20 minutes**



Time impact

Net Win \$250 per day

Denomination	Hold	Average Bet	Games Played	Time Played
1c (Feat. Games)	5%	0.70c	7,140	14 hours
10c	9%	\$1.20	2,310	4 hrs 30 mins
\$1	7.5%	\$3.50	950	1 hr 50 mins
1c	13%	0.70c	2,750	5 hrs 20 mins

Occupancy Exercise 3:

Calculate the number of games and the total time for each game to earn \$300 per day

Denom	Hold	Avg Bet	Games	Time
SAP's	5%	0.80c		
10c	9%	\$1.20		
\$1	7.5%	\$3.50		
1c	10.5%	0.65c		

Calculate the number of games and the total time for each game to earn \$300 per day

Denom	Hold	Avg Bet	Games	Time
SAP's	5%	0.80c	7,500	14 hrs 35mins
10c	9%	\$1.20	2,778	5 hrs 24 mins
\$1	7.5%	\$3.50	1,143	2 hrs 13 mins
1c	10.5%	0.65c	4,396	8 hrs 33 mins

e.g. **SAP's**: $T/O = \$ 300 \div 5\% = \$6,000$

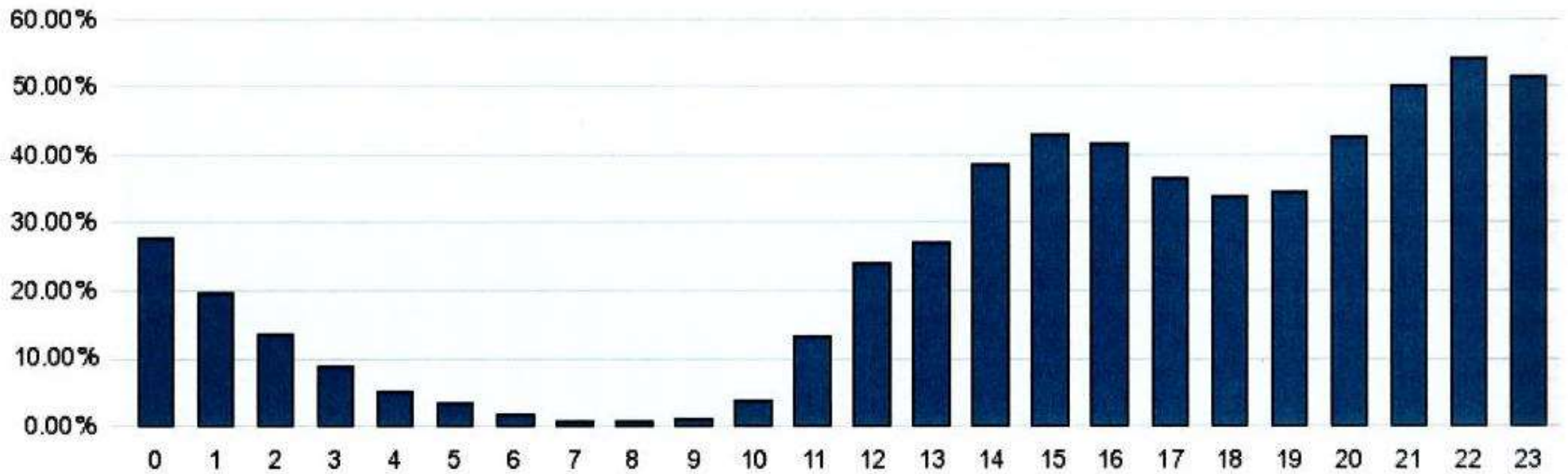
No. of games = $\$6000 \div 0.80c = 7500$

Time Taken : = $7500 \times 7 / (3600) = 14\text{hrs } 35\text{mins}$

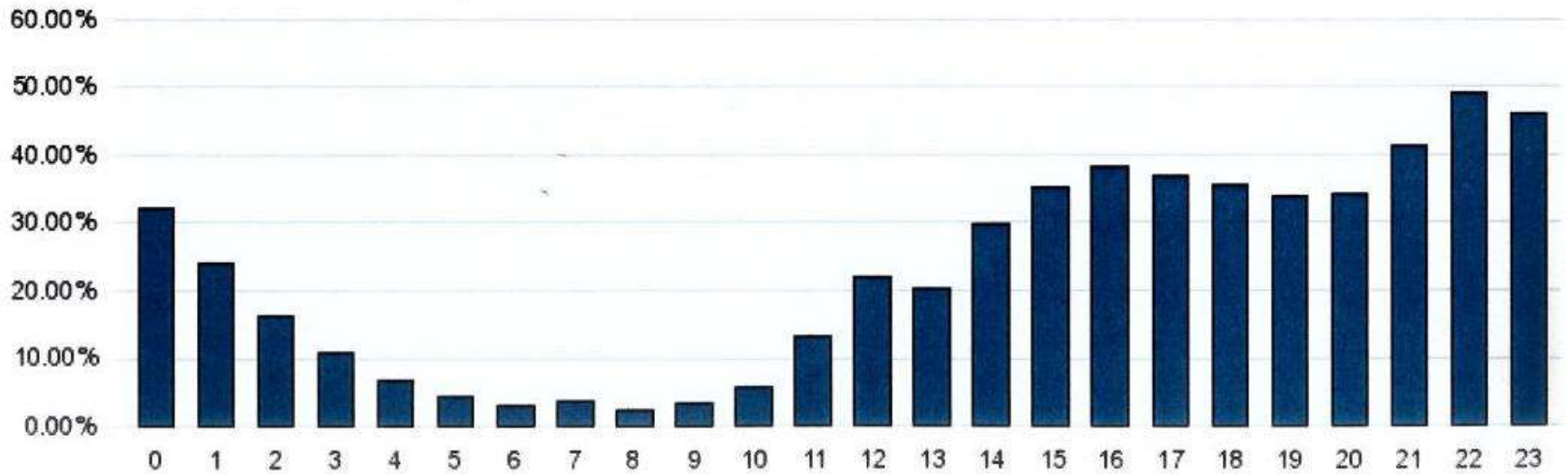
Saturday

	\$0.01	\$0.02	\$0.05	\$0.10	\$0.20	\$0.50	\$1.00
Hour/Total Units	486	227	79	32	38	2	146
0	27.68%	32.21%	25.21%	25.59%	26.25%	12.98%	15.66%
1	19.63%	24.16%	21.90%	19.66%	18.84%	15.00%	12.93%
2	13.67%	16.31%	18.66%	16.22%	15.22%	12.96%	10.77%
3	8.88%	10.94%	14.91%	12.06%	10.09%	8.25%	7.22%
4	5.25%	6.89%	11.32%	8.71%	4.21%	2.30%	5.05%
5	3.47%	4.45%	6.15%	3.24%	1.69%	0.85%	3.74%
6	1.72%	3.23%	3.38%	1.45%	0.46%	0.47%	2.20%
7	0.89%	3.67%	1.89%	0.68%	0.55%	3.89%	1.34%
8	0.77%	2.29%	2.65%	1.93%	0.22%	4.83%	1.00%
9	1.04%	3.38%	2.67%	1.21%	0.73%	2.77%	0.83%
10	3.84%	5.95%	5.15%	1.21%	3.51%	2.74%	1.25%
11	13.30%	13.42%	11.39%	5.56%	19.70%	5.17%	3.60%
12	24.23%	21.93%	17.08%	14.20%	29.30%	9.77%	6.69%
13	27.05%	20.46%	22.26%	15.06%	28.76%	11.45%	7.32%
14	38.65%	29.86%	28.70%	24.41%	34.15%	7.85%	11.93%
15	43.05%	35.33%	32.40%	26.44%	40.21%	13.04%	13.21%
16	41.54%	38.24%	33.40%	28.04%	38.71%	16.94%	16.19%
17	36.45%	36.90%	34.93%	28.41%	36.89%	14.19%	16.45%
18	33.90%	35.49%	35.86%	27.91%	33.74%	13.08%	14.40%
19	34.48%	33.93%	35.31%	27.39%	37.35%	16.68%	12.88%
20	42.81%	34.35%	34.52%	34.28%	38.59%	16.57%	14.33%
21	50.26%	41.37%	36.71%	29.94%	38.42%	13.21%	17.88%
22	54.25%	49.01%	41.24%	38.24%	43.76%	17.62%	22.90%
23	51.63%	46.12%	45.07%	38.71%	38.88%	19.13%	24.73%

\$0.01



\$0.02



Benchmarking

TIME/ VOLUME/ OCCPANCY /NET / HOLD % ???

Following is a sample of a casino revenue for a 30 day period
Fig. 1 Overall Result (100%)

Slots	1,873
Net	\$5,547,844
WPH (\$)	33
Occupancy (%)	29

Fig.2 Results per quartile (Net \$)

	Q1	Q2	Q3	Q4
Slots	423	249	803	398
Net	1,386,061	1,338,956	1,385,176	1,387,701
WPH (\$)	61	27	26	20
Occupancy (%)	17	33	21	42

“Cant Bank Stats”

“Drive the bottom Line”

“Its like golf; NOT ‘How’ Just How Many!!!

By taking multiple pictures of your gaming installation, it allows many more pieces of the gaming puzzle to become clearer!

They say.....”a picture paints a thousand words”

.....and for gaming its easier to solve a installation puzzle if you have the picture on the lid of the box.

Bottom Line Impact

- Which category is likely to increase the bottom line?
- 90% occupancy and 80% of floor average earnings
- 20% occupancy and 150% of floor average earnings



Bottom Line Impact

- 90% occupancy
- = peak and off peak play
- Additional games impact
- = more play from additional players
- = additional spend
- = straight to bottom line
- Minimal transfer of play



Bottom Line Impact

- 20% occupancy
- = no off peak play
- Few players
- High bet per game
- Additional machines spread existing play
- Average earn per machine drop
- Player spend the same
- No impact on bottom line





**GAMING
MANAGEMENT
DEVELOPMENT COURSE**

ARISTOCRAT

Player & Game Segmentation



Venue Offering

Denomination

location

Game

Game Characteristics

Win frequency

Average win

Average bet

Win to Bet Ratio

Game Characteristics

- Win Frequency:
 - The average number of “games” played per win

Average win:

- From the game “math” it is the total amount won by the player divided by the total number of winning games

The greater the win frequency the lower the value of the average win

Game Characteristics

- Average bet:
 - Turnover divided by the games played
- Win to bet ratio
 - The average win divided by the average bet
- High win bet ratio games have low game win frequencies

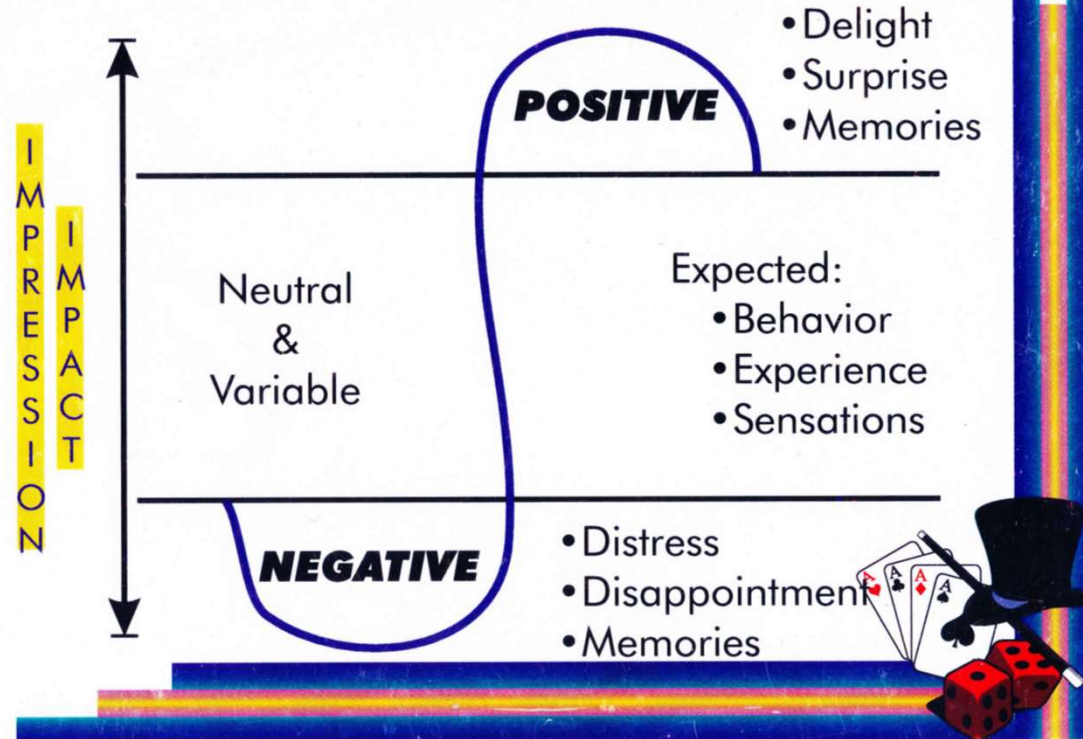
%
%
HOLD
%
?
?

A useless number when trying to engineer, or understand, the customer experience without understanding the **top award, distribution of pays and volatility.**
Empirically not what a customer feels when they play a game.

The Payout Distribution Defines The Customer Experience.

Payout Distributions For 3 Slot Machines					
SLOT MACHINE 1		SLOT MACHINE 2		SLOT MACHINE 3	
<i>Payout</i>	<i>Hits</i>	<i>Payout</i>	<i>Hits</i>	<i>Payout</i>	<i>Hits</i>
0	566,966	0	879,816	0	726,817
2	296,827	2	300	2	128,924
5	20,624	5	300	5	14,256
10	50	10	300	10	9,840
25	50	25	400	25	2,400
40	50	40	400	40	800
50	40	50	500	50	500
100	30	100	800	100	320
150	25	150	600	150	240
180	20	200	400	200	180
200	15	300	400	250	240
300	12	500	300	300	100
400	10	1,000	200	500	50
500	8	2,000	10	750	32
1,000	5	3,000	6	1,250	24
1,200	3	5,000	3	1,500	12
100,000	1	10,000	1	2,000	1
<i>Cycle</i>	884,736	<i>Cycle</i>	884,736	<i>Cycle</i>	884,736
<i>Hits</i>	317,770	<i>Hits</i>	4,920	<i>Hits</i>	157,919
<i>Payback %</i>	94.50%	<i>Payback %</i>	94.84%	<i>Payback %</i>	94.66%
<i>Hit Freq.</i>	35.92%	<i>Hit Freq.</i>	0.56%	<i>Hit Freq.</i>	17.85%
<i>V.I.</i>	175.57	<i>V.I.</i>	43.64	<i>V.I.</i>	21.04

OUTSIDE THE BAND OF NORMALCY



Impact Of Hold Percent Changes

Customers In Aggregate Will

- Get Less Time On Device
- Have Fewer Strokes Per Trip
- Have Fewer Chance To Beat The House
- Fewer Chances To Get In Bonuses
- Adjust There Average Bet Down To Get More Time On Device While Maintaining Their Gaming Budget

Relevance:
Operators
may be
giving up
long term
customer
satisfaction
for short
term profits.

The Balancing Act



But... Over the life of a Poker Machine



But... Over the life of a Poker Machine



Game Segments



STICKY WILD FREE GAMES FEATURE

When **3X** scattered  appear **10** free games are won. Any  appearing during the free games stays in the window and substitutes for all symbols except scatters. Feature can be triggered again during the feature once, with 5 free games awarded.

 substitutes for all symbols except scatters.

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PELICAN

Pete

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1 Credit													
5	50												
4	15												
3	5												



1 Credit	
3	4

All wins left to right only. All wins shown in credits. **PAYS LEFT TO RIGHT**
 COPYRIGHT © 2004 ARISTOCRAT TECHNOLOGIES AUSTRALIA PTY LIMITED. PLAYER IS RESPONSIBLE TO CONFIRM CREDITS REGISTERED BEFORE GAME START. MALFUNCTION VOIDS ALL PAYS AND PLAYS. 27-4498

Game Segments

Magic Mystery

Con la partecipazione di Magic Mr. E

Simboli Sparsi

5 20 Partite Gratuite
4 15 Partite Gratuite
3 10 Partite Gratuite
2 200

Paga in ogni posizione

Simboli Jolly

5 125000
4 50000
3 5000
2 200

Sostituisce ogni simbolo eccetto i simboli: &

Tutte le vincite sono mostrate in crediti

5 15000
4 2500
3 500

5 5000
4 1500
3 300

5 5000
4 1500
3 300

5 8000
4 2000
3 400

Simboli Sparsi

3 Cilindri attivano il Bonus

9

5 2000
4 500
3 100

10

5 2000
4 500
3 100

J

5 2000
4 500
3 100

Q

5 2000
4 500
3 100

K

5 2500
4 1000
3 200

A

5 2500
4 1000
3 200

La vincita massima consentita, ad esclusione del jackpot, per ciascuna partita, è pari a 5000 €.

Durante le partite gratuite tutte le vincite sono moltiplicate per 4

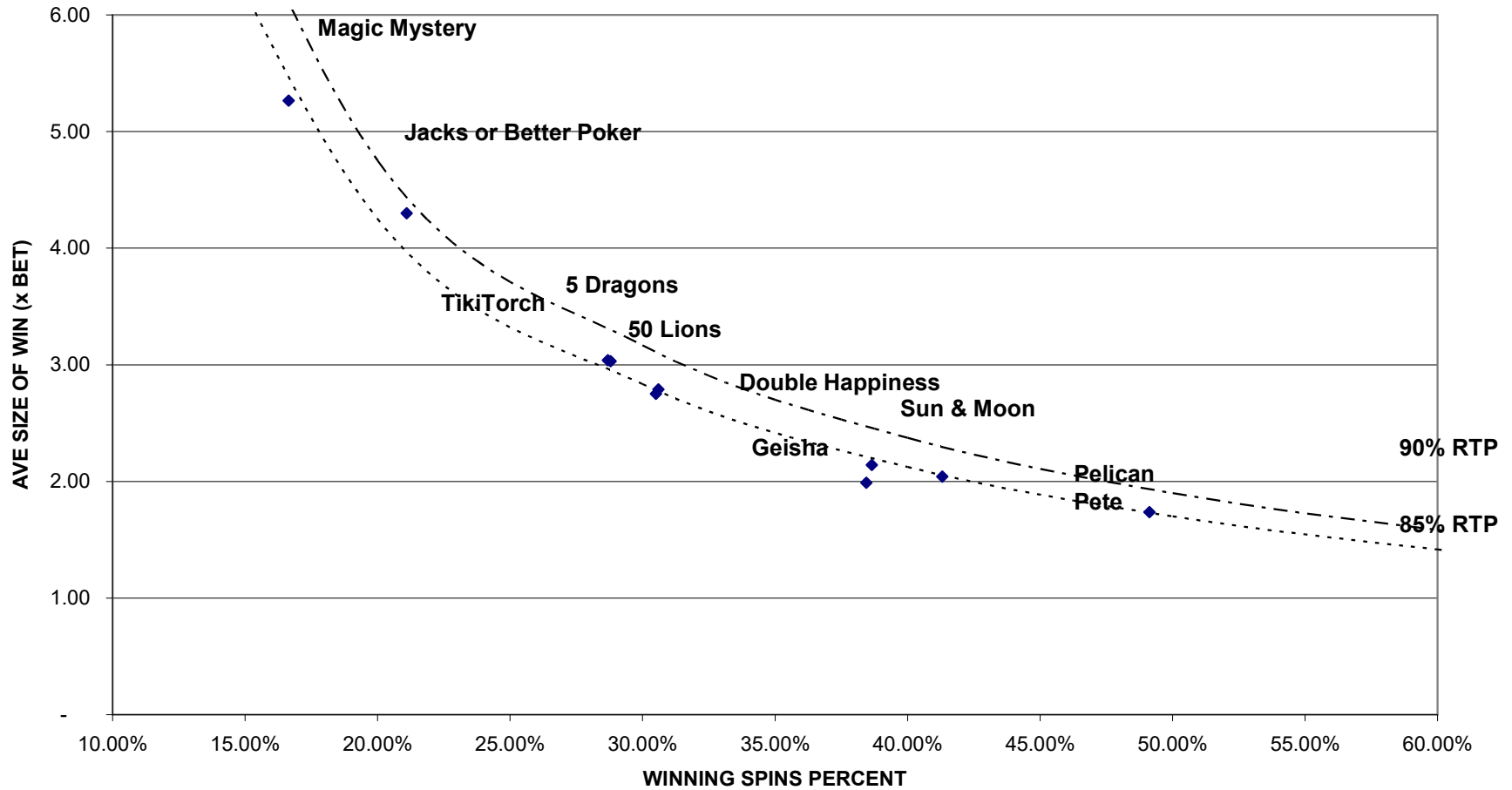
Game Segments

	Coin in	Games	Bet	Games Played	Winning Games	TTL Game Winnings	Hold %	% Win	Avg Win	Bet	Avg Win/ Bet
ace-jacksorbetter-rtp89	269,799.75	145,394	\$1.86	145394	30679	€244,735.00	9.29%	21.10%	\$ 7.98	\$1.86	430%
ali-5dragons-rtp85	153,005.40	114,483	\$1.34	114483	32850	€133,388.80	12.82%	28.69%	\$ 4.06	\$1.34	304%
ali-pelicanpete-rtp85	135,746.00	87,090	\$1.56	87090	42785	€115,880.15	14.63%	49.13%	\$ 2.71	\$1.56	174%
ali-doublehappiness-rtp85	127,768.50	97,664	\$1.31	97664	37751	€105,756.75	17.23%	38.65%	\$ 2.80	\$1.31	214%
ali-sunandmoon-rtp85	185,986.20	143,630	\$1.29	143630	59328	€156,911.93	15.63%	41.31%	\$ 2.64	\$1.29	204%
ali-50lions-rtp85	446,200.25	377,094	\$1.18	377094	115017	€374,295.25	16.11%	30.50%	\$ 3.25	\$1.18	275%
ali-tikitorch-rtp85	135,675.00	83,706	\$1.62	83706	24099	€118,353.90	12.77%	28.79%	\$ 4.91	\$1.62	303%
jvh-magicmre-rtp85	174,098.00	211,410	\$0.82	211410	35186	€152,542.50	12.38%	16.64%	\$ 4.34	\$0.82	526%
ali-geisha-rtp85	142,123.20	100,897	\$1.41	100897	38789	€108,660.19	23.55%	38.44%	\$ 2.80	\$1.41	199%
Totals	1,770,402.30	1,361,368	\$1.30	1361368	416484	\$1,510,524.47	14.68%	30.59%	\$ 3.63	\$1.30	279%

Game Segments

HIT FREQUENCY & WIN : BET RATIO

COGETECH GAME PORTFOLIO



Saturation Point

When additional units of an EGM title/denomination/type does not generate incremental revenue growth. e.g.

Units	Turnover (Av)	Total
6	\$12,000	\$ 72,000
8	\$14,000	\$112,000
10	\$14,000	\$140,000
12	\$12,000	\$144,000
14	\$10,300	\$144,200
16	\$ 9,000	\$144,000

Benchmarking

In terms of gaming “benchmarks” are a set of goals/aims/measures of an EGM performance based on an arbitrary measure. e.g.:

Turnover

Win per day

Occupancy (time)

Occupancy (%)

Peak and off-peak demand

Players Experience

Remember it is the right

“RANGE OF GAMES”

not just the ranking report

that will optimise EGM venue earnings.

Success

If success in NSW Club gaming is 'the bottom line' then;

- **Profit** is driven by turnover
- **Turnover** is driven by patronage
- **Patronage** is driven by visitation(s)/Occupancy

In a repeater market you need repeat business !

Continued success and growth occurs where expectation is matched by experience.


To be 'In the game' you need to address:

Tangibles & Intangibles

- 1) Basic requirements
- 2) Point of difference - offerings
- 3) Custom(er)/tailored gaming solutions

Custom(er) Gaming Solutions (Product Segmentation)

- Typically three player groups:

(i)  > \$ (ii)  = \$ (iii)  < \$

“I have a good time....” “I have a good run for my money “ “I have some good wins”

CONSIDER THESE QUOTES

“The answer to the question - What makes a good game, depends on who you ask, and at what stage of their gaming visitation”

“Great, I Won!”

“Lousy, I lost my money in 20 minutes”

“Yeah okay; I didn't win but I had a great run for a couple of hours”

All typically of current experiences.

Today games struggle to attract new audiences because consumer expectations are higher than ever, competition for discretionary spend is vast, and continual increases in avenues in which to gamble.

“Look at slots as a launching pad for each players (individual) ‘Gaming Journey’. It's where great battles are fought against long odds and losses are simply obstacles to overcome on a path to a players' desired destination.”

Typically:

(i) Time > \$

(ii) Time = \$

(iii) Time < \$

Small stake rate	Mid Stake rate Higher Av bet than (i)	High stake rate
Small spend per visit	Mid range spend Av spend higher than (i)	High \$ spend per visit
Long play time	Medium play times	Short play periods
Visitation high	Medium visitation	Visitations vary to \$/Bank
High Re- Investment	Medium Re - Investment	Volatile Redeems vs losses
Older woman	Wide range, both sexes	Younger male
Small denom player	Cross-section in denoms	High denom player
Predominately 1c	Denom varied (migrates)	Predominately \$1

Venue Objectives

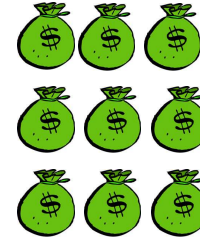
- Attack the core through a balanced risk portfolio.
- Position E-Series as incremental across all venues...multi-game value add.
- Establish a beachhead in the SAP segment.
- Cultivate the link segment and align requirements with other regions.
- Define a clear content/ innovation strategy for multi-game that maximises our penetration.
- Innovate bet structure to balance cost to cover and “buy up” trends.
- Establish player loyalty across product family & segments
- Flexible planning and development effort (fast follow)



Target Segment



- 1c
- 2c
- 5c
- 10c
- 20c
- 50c
- \$1



OR



Volatility



Feature



BALANCE

Jackpots



impact on consumers....

1. Always on, connected



2. Time Scarcity



3. Abundant Choice

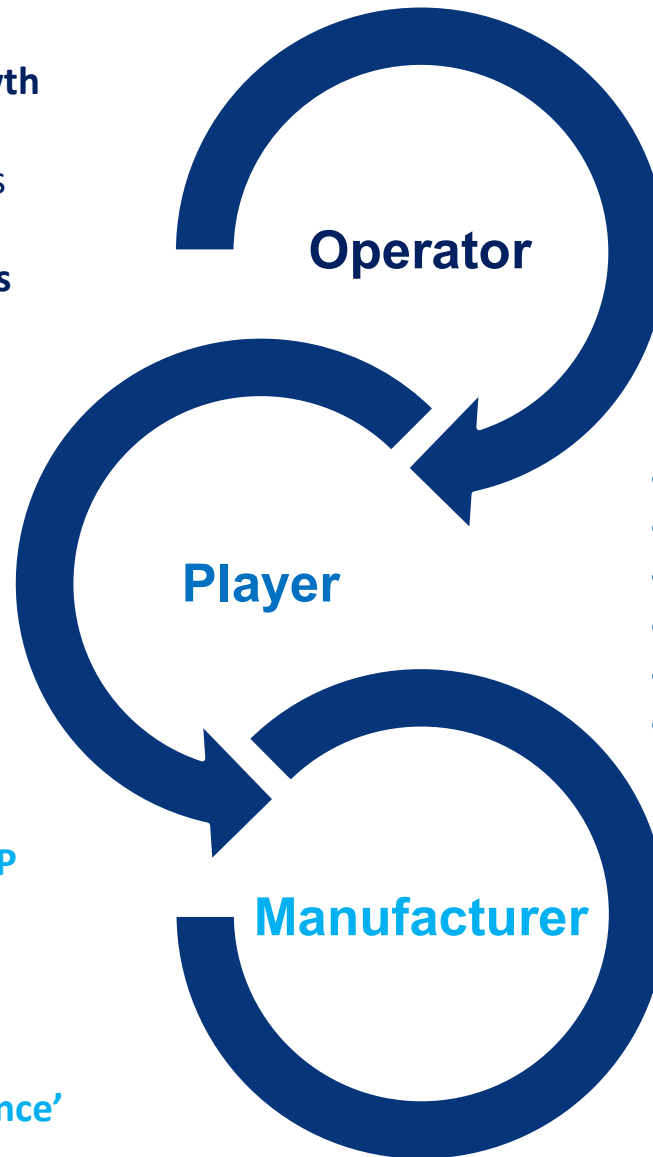


4. Attention Deficit



the challenges will continue....

- **Sustainable** gaming revenue **growth**
- Game Performance **volatility**
- **Capital management** & cash flows
- Rate of new **product** introduction
- Retaining & attracting new **players**
- Fierce **competitive** pressure



- Access to **best gaming experience**
- Demanding **more choice**
- Entertainment **alternatives**
- Evolving **technologies**
- Brand **affinity**
- Desire for **new & different**

- Delivering true value through our **IP**
- Continued **investment** in **R&D**
- Pioneer breakthrough **innovations**
- **Content support** for existing fleet
- **Sustain** product **performance**
- Delivering the best **player 'experience'**

Its about the best player experience....

THE BEST
PLAYER
EXPERIENCE



INVEST
PRODUCT
INNOVATION



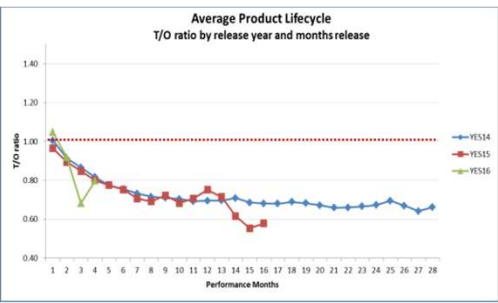
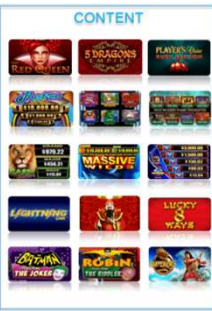
OPTMISE
PRODUCT &
SERVICE OFFERING



Attract.
New. Different

Retain
Dynamic. Choice.

Grow
Expand. Extend



CONTRIBUTION ANALYSIS

Install % : T/Over % : Net %

- Volatility vs. RTP
- WPD vs. T/Over
- Popularity vs. Profit
- Occupancy vs. Benchmark
- Peak vs. Off-peak

Aim:

To cater each Group's expectation with what they experience!

“Look from the outside in”

Consider:

- Denomination vs. RTP
- Volatility
- Product type/Mix
(lines, standalone, SAP, 2nd feature, Ante Bet etc)
- Occupancy Rates (DOTW, times, peak and off-peak demands)
- EGM locations (category assignment, product mix)
- Venue Demographics (it's hard to see who is not playing)
- Availability (Multi-Denomination/Multi-Game EGM's)
- Cost Effective 'Migration'

Ever Changing World

“The Distribution of Things”

Horse
Train
ship
Plane
Spacecraft

Morse code
Telegraph
Telephone
Mobile
Telex
Fax
Email
Skype

Radio
TV
PC
Internet
3D

Barter
Money
Cashless
Tap & Go
Ecommerce
Digital Wallet

Bus
Taxi
Uber

Phonogram
Records
Vinyl
Tape
Cassette
CD
Spotify

Library
Encyclopedia
Google
Cloud
Apps

Silent Movies
Talkies
16mm
8mm
Video
DVD
Netflix

Cleaner
Tutor
Life coach
Pet walker
Gardener
Driver
Trainer

Land Mail
Email
Instagram
Facebook
Dropbox

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DID YOU KNOW

SURVEY SAYS

USA – Slot Players

- 50% expect to lose
- 19% expect to win
- 45% play for entertainment
- 68% like free games / features
- 58% under 35 look for more social interaction
- 51% under 35 are looking for more skill based gaming

AUSTRALIA

- In 2020 there were more 65 year olds, than 1 year olds
- In 2020; 20% of the population was over 60
- Patrons on average are a member of 5+ Clubs

LAS VEGAS – 2020 Visitation

- Millennials 63% gambled
- GenX 68% gambled
- Baby Boomers 78% gambled
- Vast majority of visitors were under 50
- Vast majority that played slots were over 50
- Revenue generated 65% non-gaming / 35% gaming

FACT

For jurisdictions that allow over 18 participation in gaming – going forward those eligible have been born in the 21st Century –
“with a mobile in their hand”

The ‘appetite’ and ‘experience’ continues to grow in relation to unique / tailored activities

TRENDING...

ONLINE COMPETITION

- Virtual Casino – Tables, Slots, Poker
- Social Casino
- Horse Betting
- Sports Betting
- E-Sports
- Fantasy Sports

VENUE BASED SLOTS

- Base game variety (licensed, themed)
- Free Games (multiplier)
- Bonus Features
- Jackpots (random, symbol driven)
- Multi's – Line, Denom, Games
- Player Selectable options

PENDING

- Skilled Games?
- Apps?
- **What Do Your Punters Want?**
 - Bigger Wins
 - Time on Device
 - Wider method of winning
 - Enhanced entertainment

TRENDING...

TARGET MARKET

- **We know**
 - Millennial
 - GenX
 - GenY
 - Baby Boomer
- **But have you heard of**
 - **PROSUMERS**
 - Those who seek to self tailor, self-serve , self design, 'select of their terms' what and how they consume product and experiences
 - **NETTELS**
 - Not enough time to enjoy life
 - **TWITS**
 - “teenage woman in their thirties”
 - **DOWNAGERS**
 - Over 60's “who do not intend to retire”
 - e.g. 'Grey Nomads' slogan growing old disgracefully

POINT OF DIFFERENCE

- Pet Friendly
- Interactive website
 - Photo album
- Venue specific apps
 - Parking
 - No queuing
 - E-ticketing
- Valet / VIP Parking
- Tailored Privileges
 - Take home / tailored meals
 - Cleaning Services
 - Companion Shopping
- Transitional Area of Focus
 - Meet, greet, farewell
- Personalised Recognition
- Niche Marketing
 - Specialised Languages
 - Customs
 - Celebrations
 - Feng Shui
- Customs
- Leadership & Training
- 'Chameleon' Marketing



GAMING MANAGEMENT DEVELOPMENT COURSE

Summary

- In a repeat customer market, success is derived when –

Expectation has been reinforced by the **Experience**

As per **“The Field of Dreams”**

“Build it.....and they will come!”

