## National Club Visitation Research Study

## 2022

13th January 2022

#### Background

The Club Managers Association of Australia (CMAA) has appointed Wohlsen Consulting as its Exclusive Research Partner for 2022. The objective of the partnership is for the CMAA and Wohlsen Consulting to provide relevant data and insights to club management for improved business outcomes.

The first research study for 2022 is planned to be a National Club Visitation Survey, which is an online member survey for participating clubs.

#### Objectives

To provide clubs with key information on members behaviours and attitudes:

* Club visitation (frequency and recency)
* Other clubs, hotels, casinos visited
* Visitation drivers for clubs, differentiating factors
* Facility usage
* Spending behaviour and general behaviours
* Ratings of club facilities and experience
* Ratings of COVID safe practices
* Propensity to recommend club to friends (Net Promoter Score)
* Future intentions
* Each response to be segmented by key demographics – age and gender
* We will also segment the results for high spending customers

To provide participating clubs with responses to a standardised set of research questions from their members which will be benchmarked against a national and state cohort of clubs.

This will then act as a management tool for clubs to further develop strengths and opportunities and address issues or weaknesses according to member behaviours and opinions.

Aggregated research results will also be provided to the industry via CMAA publication and may be presented at industry events

#### Privacy

Wohlsen Consulting guarantees to protect the privacy of data for individual clubs and will only publish aggregated data.

Key practices to ensure Club data privacy is maintained include:

* Member survey will be operated online (Survey Monkey) with member anonymity guaranteed (separate survey for each club participant).
* Clubs will send the survey link to their member base, and no member details are required to be provided to CMAA or Wohlsen Consulting.
* Club specific data will only be provided to participating clubs for their own members survey results.
* Only aggregated data will be provided to the industry with no mention of specific club names.

#### Club Participation Target

The target minimum number of clubs participating in the survey is 45 nationally

* NSW 20
* Vic 10
* Qld 10
* ACT 5

Ideally, we would have 100 clubs participate. Should there be greater demand from clubs to participate in the survey, there is the opportunity for these numbers to be exceeded as the survey mechanism is scalable. There will also be additional benefit if we exceed the numbers as the sample sizes by state would be increased creating greater statistical certainty.

The investment for each participating club is

* 3,500 for first venue
* $3,300 for second venue
* $3,100 for third and above venues

The advantage for participating clubs is that they will receive a report with their club’s specific results with comparisons to state and national results.

#### Survey Mechanics

Online survey completed by Survey Monkey. Wohlsen Consulting will prepare the questionnaire and provide the link for each club. Each club will email their member base encouraging them to participate in the survey.

Clubs may opt to offer an incentive for completion of the survey e.g., chance to win $500 in vouchers to be spent at the club

It is highly recommended that the survey is brief to ensure participation rates.

We can expect approximately a 10-14% response rate (assuming we are able to maintain a time limit of 5 minutes for respondents to complete the survey).

#### Reporting

Wohlsen consulting will develop the final report for each club and the national report.

Participating clubs will be sent the report by email and will be offered a one-hour online meeting with Wohlsen Consulting to review and discuss their particular results against the national database.

The CMAA will send the national survey results out to all of its members base by email.

Wohlsen Consulting will present the results at key CMAA meetings as agreed with CMAA.

#### Questionnaire

The following are the proposed questions for the survey. There are 19 standard questions. In addition, venues may opt for 1-2 questions specific to their venue.

Demographics:

1. How long have you been a member of [Club Venue Name]
2. Age
3. Gender
4. Postcode you normally reside at

Visitation:

1. Following the reopening after lockdown, how often would you visit us at [Club Name] to have a drink, something to eat, play our machines, attend a function or entertainment event?
2. On your last visit to [Club Name], how much did you spend in the bar on drinks for you only?
3. On your last visit to [Club Name], how much did you spend in our restaurant and café on food items for you only?
4. On your last visit to us, approximately how much money did you spend at our poker machines?
5. Please indicate other clubs or hotels (other than us at [Club Name]) that you might have visited in the last 18 months (for example before Covid) – select any number: (this list is compiled in conjunction with the participating club).
6. Thinking about the venues that you visit in the area including us at [Club Name], nominate up to three other club or hotel/pub venues that you visit most often (your favourites):

Motivations for visitation:

1. Let us know how important each of the following factors is for deciding which club, hotel or other venue to visit:
   1. Safety, including COVID practices
   2. The benefits that the venue provides to the community
   3. Convenience of the venue
   4. Car parking (easy, safe)
   5. The quality, variety and value for money of the food
   6. The price of the drinks
   7. The gaming machine environment (machines, chairs, signage etc)
   8. Friendliness, customer service
   9. Ambience, décor
   10. Cleanliness
   11. Entertainment offered
   12. The promotions and give-aways

Ratings on venue, facilities, service and COVID safe:

1. How do you rate [Club Name]in terms of décor, appeal and cleanliness?
2. On your last visit to [Club Name] how would you rate our service standards?
3. How would you rate the food (generally) at [Club Name]?
4. How safe do you feel at [Club Name], inside and out?
5. How well do you rate your club on COVID safe practices?
6. What could be improved to support COVID safe practices – select from provided responses

Recommendation and open-ended questions

1. How likely are you to recommend to a friend or family member that they visit [Club Name] at xx location?
2. Please provide comments if you have any additional feedback (Open ended)

2 specific questions allowed for each club (simplicity important)

#### Timing

February Recruitment via webinars and email invitation

March/April Send out survey to members

April May Analysis of results/writing reports

May June Publish results and start meeting participating clubs for result review

We will confirm the key CMAA events for the results to be presented?

#### Payment mechanism

Wohlsen to confirm with clubs and invoice clubs directly.

Revenue split for the project 85% Wohlsen Consulting /15% CMAA.