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NSW Club Operational Benchmarking & Gaming

May 2022

13/05/2022

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Introduction to Wohlsen Consulting

- Wohlsen Consulting → Geoff & Philip Wohlsen
- Geoff: Law & Economics, University of Qld, BP Oil, KPMG Consulting, own practice or partnerships incl DWS
- Philip: Bachelor of Business QUT, MBA AGSM UNSW. Unilever, Arnott's, Pfizer, Johnson and Johnson, Bayer, GSK, own practice
- 28 years of club & hospitality experience + high level corporate

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NSW 60 Large Club Groups Financial Benchmarking Study

2019 & 2020

Revenue, earnings, balance sheet

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The Club model - 2019

GAMING $73	BAR $11	CATERING $13	OTHER $3
GAMING SURPLUS $40 (55%)	BAR SURPLUS $2 (18%)	CATERING SURPLUS <$1 (3%)	OTHER $3

FRONT OF HOUSE GP $46 (46%)

OVERHEADS $27 (27%)

EBITDA $19 (19%)

EBITDA per Group dropped from $8.55M (at 18.8%) in 2019 to $8.16M (at 22.1%) in 2020

EBITDA is profit before interest, tax, depreciation, amortisation

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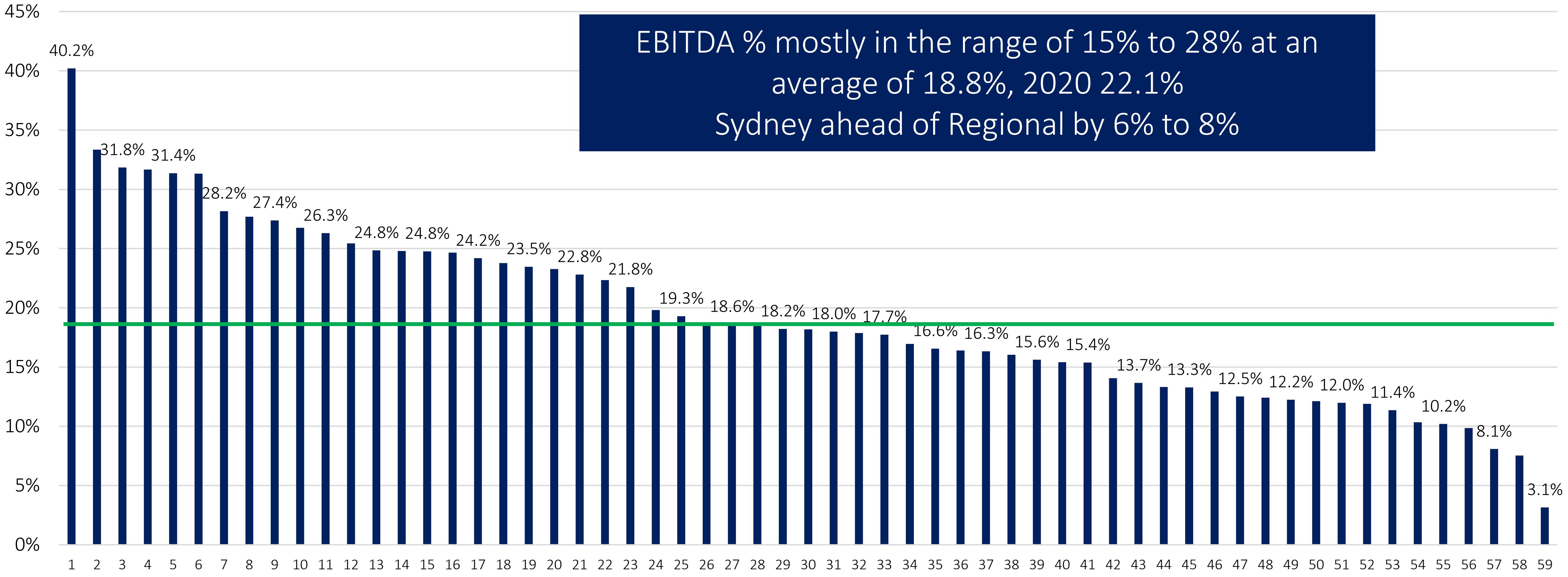
EBITDA % spread - 2019



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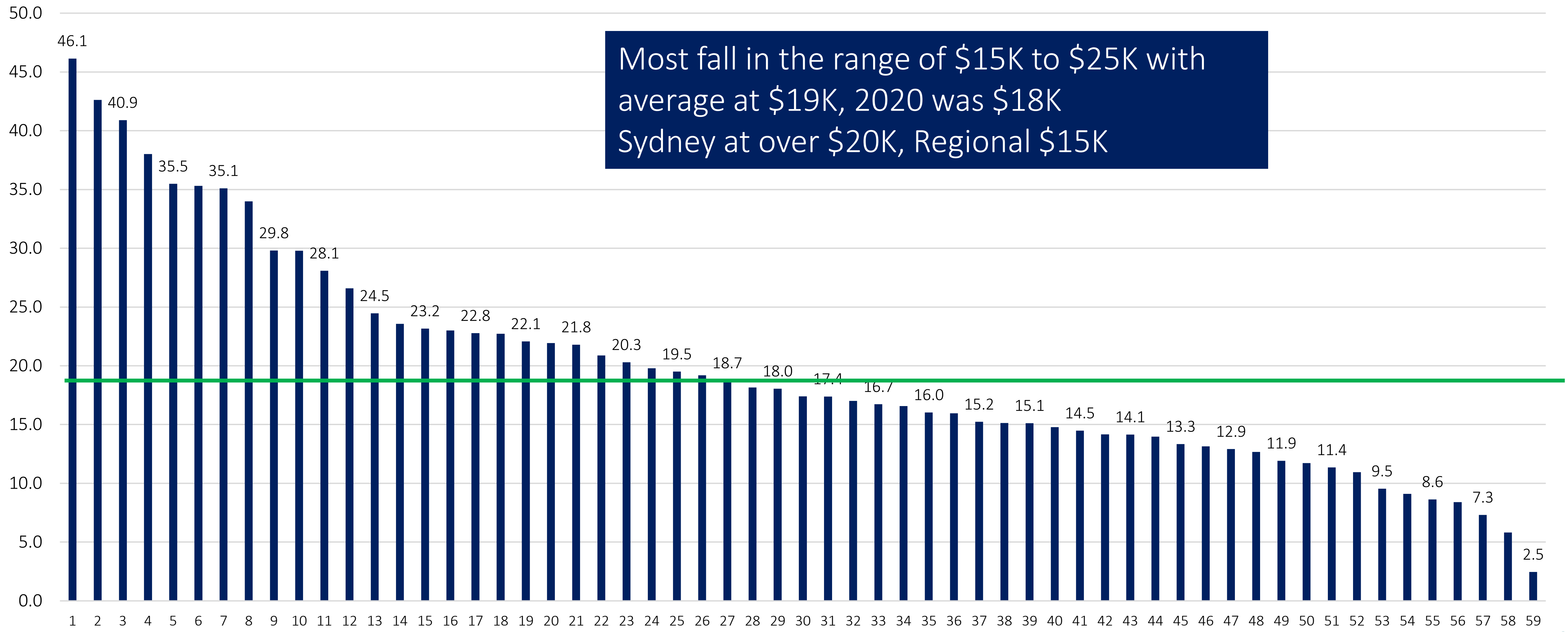
EBITDA per machine - 2019



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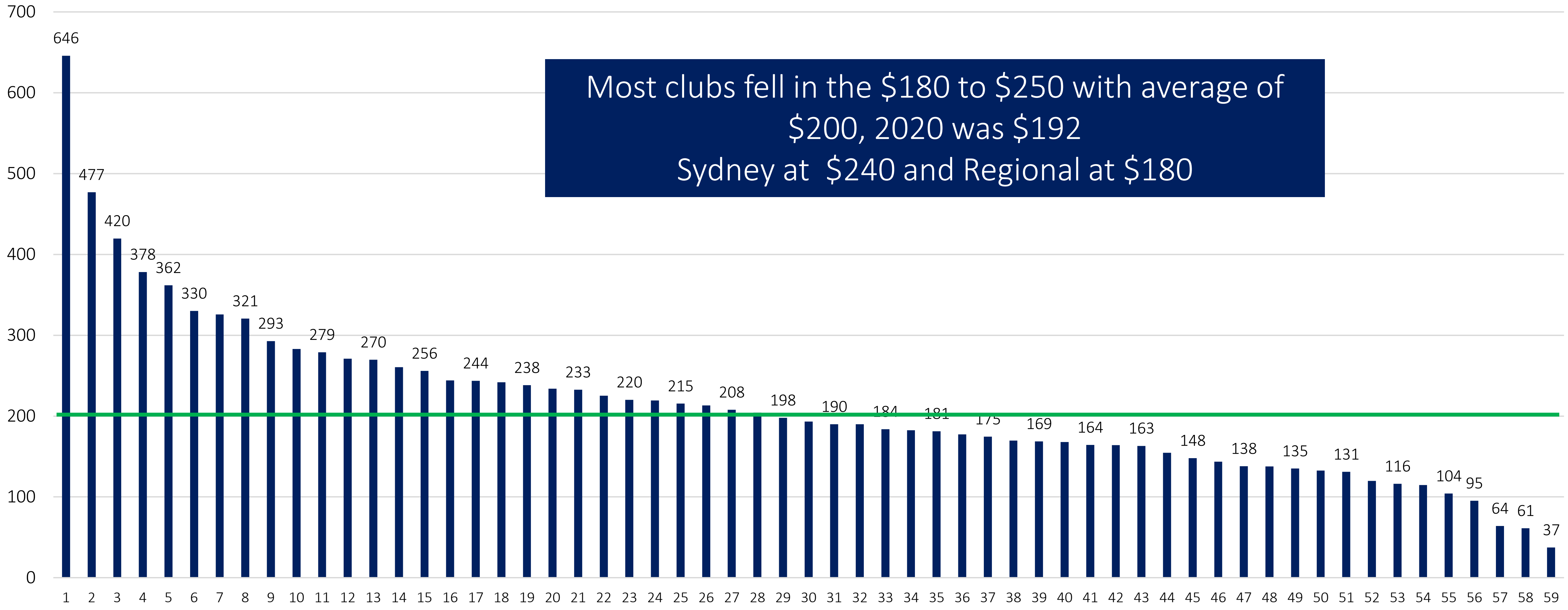
EBITDA per member - 2019



Most clubs fell in the $180 to $250 with average of $200, 2020 was $192
Sydney at $240 and Regional at $180

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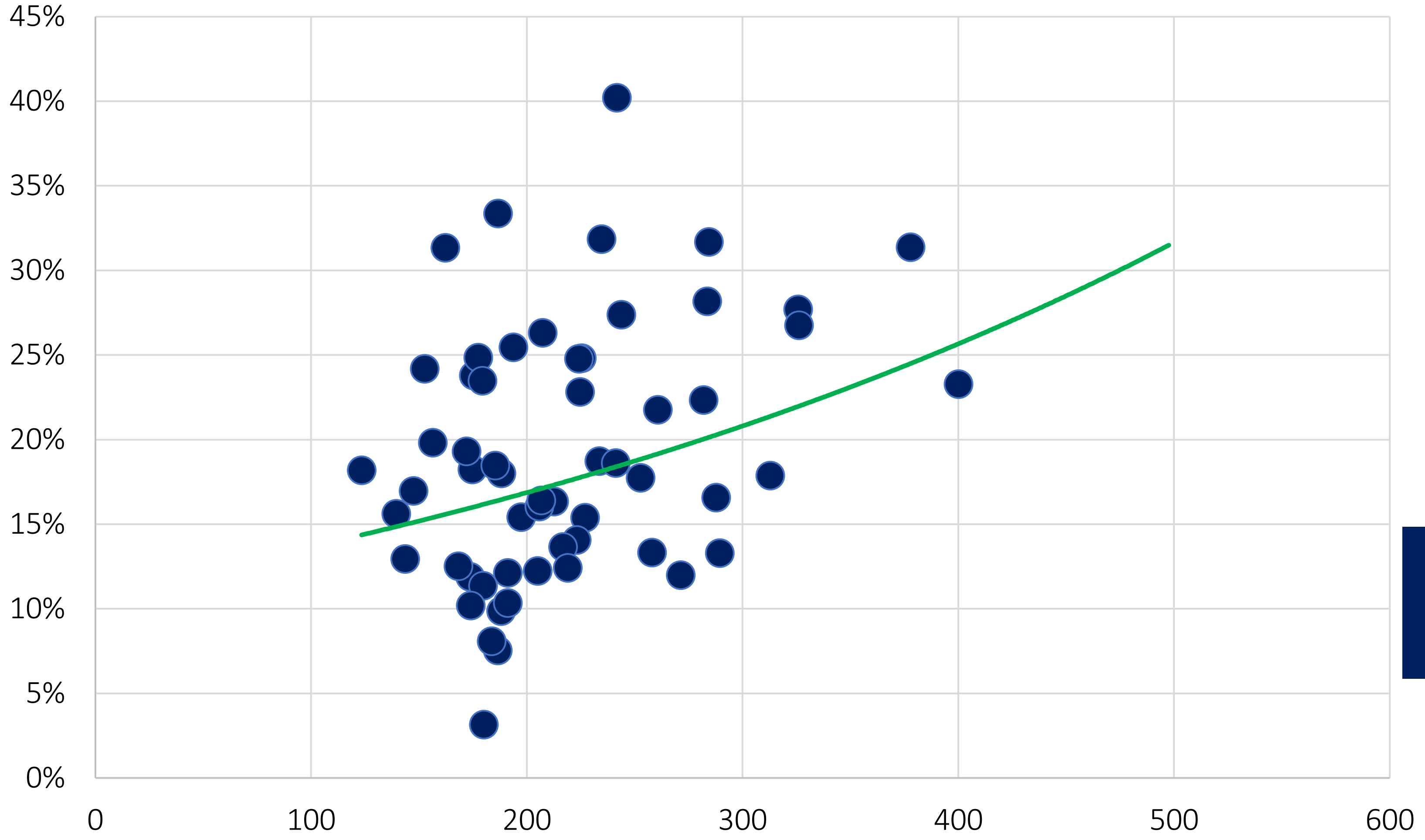
Correlation EBITDA & ADR



ADR	EBITDA%
150	15.7%
200	17.7%
250	19.7%
300	21.7%
350	23.7%
400	25.7%

For every $50 increase in ADR, EBITDA% increases by 2%

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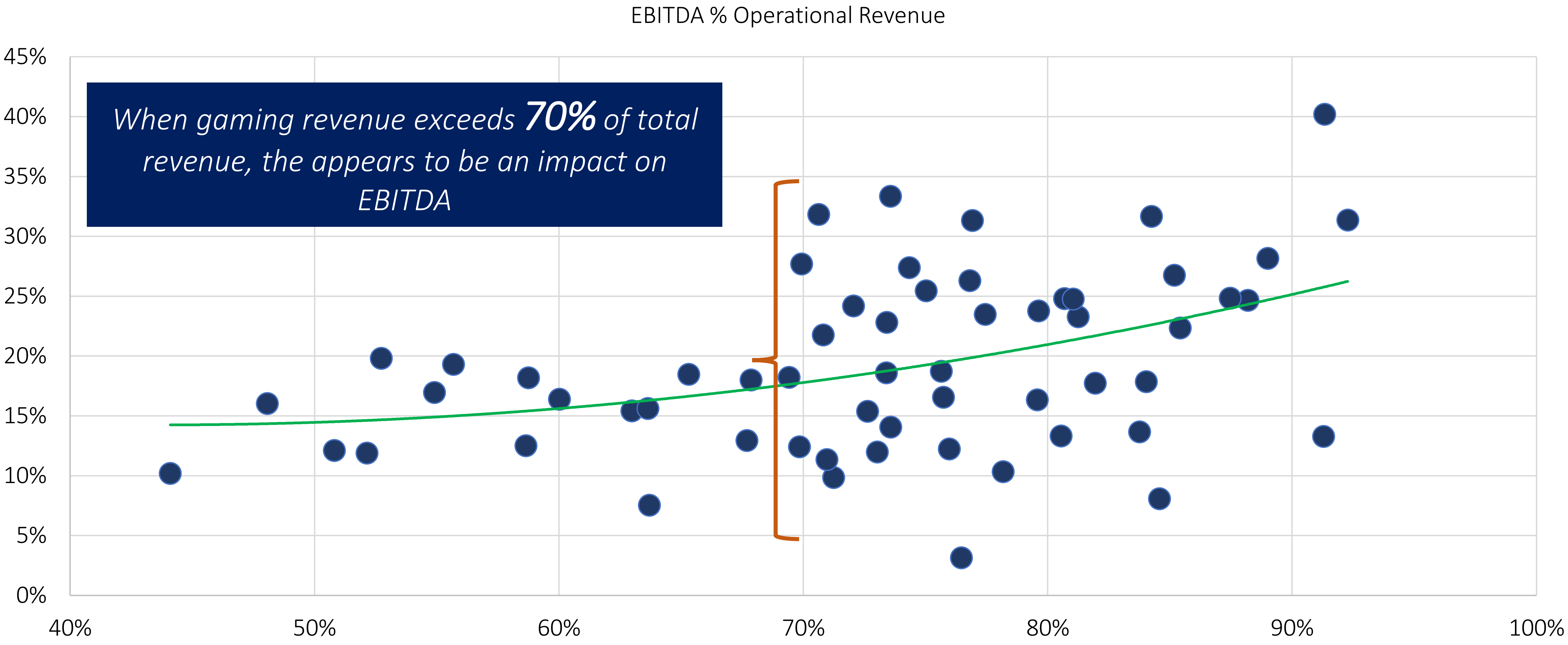
Correlation EBITDA & % gaming rev - 2019



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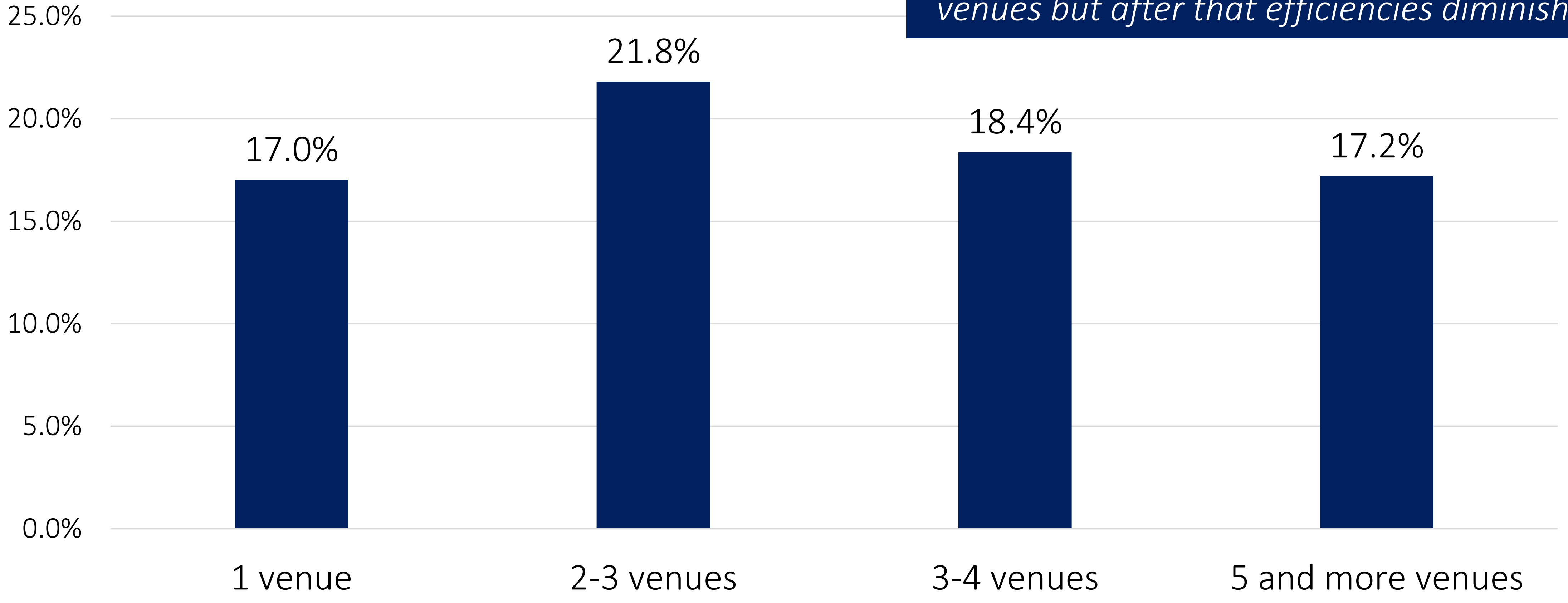
EBITDA by number of venues

There are efficiencies in running up to three venues but after that efficiencies diminish



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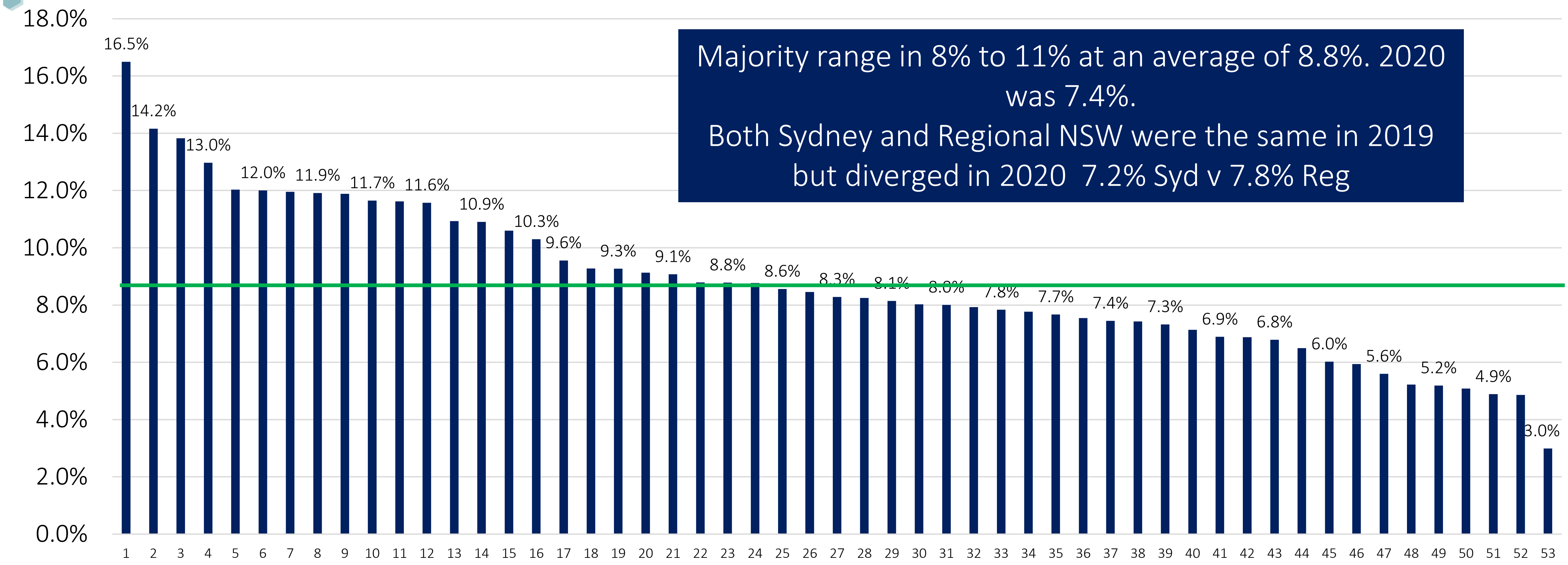
AEMP – 2019

Majority range in 8% to 11% at an average of 8.8%. 2020 was 7.4%.
Both Sydney and Regional NSW were the same in 2019 but diverged in 2020 7.2% Syd v 7.8% Reg



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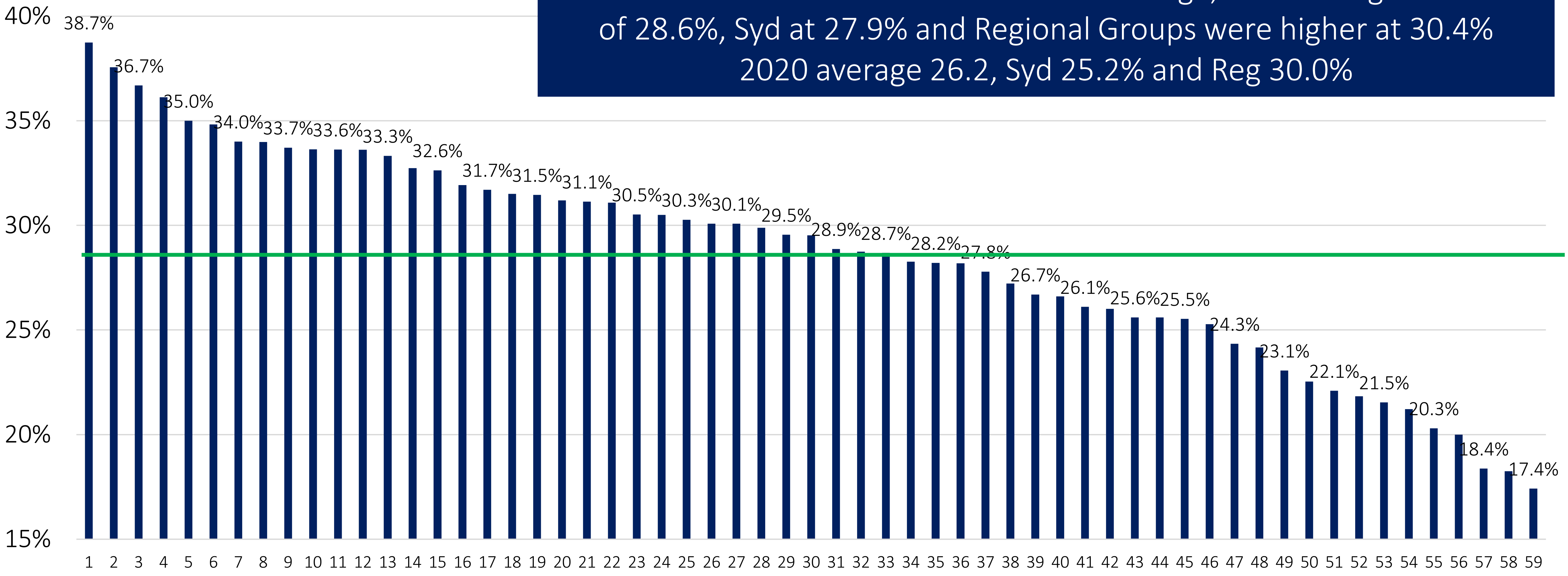
Total Remuneration costs % Rev – 2019

Most are in the 25% to low 30% range, with average of 28.6%, Syd at 27.9% and Regional Groups were higher at 30.4%
2020 average 26.2, Syd 25.2% and Reg 30.0%



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O/head cost items - % total revenue

	2019	2020
Repairs and maintenance	2.17%	2.67%
Power costs	2.10%	2.38%
Cleaning costs	1.75%	1.80%
Security costs	1.41%	1.40%
Insurances	0.86%	0.92%
Professional fees & audit	0.34%	0.38%

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EBITDA profile by EBITDA range 2019

	High 25% and over	Mid 18% - 25%	Low below 18%
Groups (number in segment)	16	17	26
Venues (number in segment)	28	44	61
Machines (operational in segment)	6,015	8,339	12,399
Members (in segment)	0.635	0.806	1.090
ADR $	$265	$223	$207
Gaming revenue %	81.1%	74.1%	69.8%
F&B revenue %	13.4%	20.1%	23.3%
Other revenue %	5.6%	5.8%	6.9%
Total revenue %	100.0%	100.0%	100.0%
F&B GP %	57.9%	54.9%	61.7%
AEMP %	9.1%	7.4%	6.8%
Remuneration costs %	24.5%	24.9%	31.0%
EBITDA %	28.8%	20.3%	13.0%
EBITDA per member $	$297	$210	$145
EBITDA per machine $	$31,323	$20,312	$12,747

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Region v Sydney profile 2019 & 2020

	Regional '19	Regional '20	Sydney '19	Sydney '20
Groups	17	17	42	42
Venues	39	39	94	94
Machines	6,473	6,521	20,280	20,258
Members millions	0.567	0.571	1.964	1.941
ADR $	$171	$192	$242	$250
Gaming revenue %	63.7%	66.5%	76.6%	79.6%
F&B revenue %	28.2%	25.7%	17.7%	15.6%
Other revenue %	8.1%	7.8%	5.7%	4.8%
Total revenue %	100.0%	100.0%	100.0%	100.0%
F&B GP %	64.5%	63.3%	56.6%	55.1%
AEMP %	8.8%	7.2%	8.8%	7.8%
Remuneration costs %	30.4%	30.0%	27.9%	25.2%
EBITDA %	14.3%	14.9%	20.4%	24.6%

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What are the benchmarks for NSW clubs?

NSW club benchmarks 2020	Regional	NSW - Great	NSW - Medium	NSW - some Improvement
Gaming				
ADR	$190 or higher	$280 or higher	$250	$180 or lower
Gaming revenue %	68% or higher	80% or higher	75%	60% or lower
Gaming promo/loyalty/comps	5% or lower	4% or lower	5%	6% or higher
Gaming wages (exc on-costs)	5% or lower	4% or lower	5%	6% or higher
Bar				
COGS	37% or lower	34% or lower	36%	38% or higher
Bar wages (exc on-costs)	23% or lower	20% or lower	22%	24% or higher
Main dining and café				
COGS	37% or lower	34% or lower	36%	38% or higher
Food wages (exc on-costs)	46% or lower	42% or lower	45%	48% or higher
Functions				
COGS beverage	35% or lower	32% or lower	34%	36% or higher
COGS food	35% or lower	32% or lower	34%	36% or higher
Function wages (exc on-costs)	44% or lower	40% or lower	43%	46% or higher
Overheads				
AEMP venue wide	4.7%	4.0%	4.5%	5.0%
Repairs and maintenance	2.5%	2.2%	2.4%	2.7%
Power costs	2.4%	2.1%	2.2%	2.4%
Cleaning costs	1.9%	1.7%	1.8%	2.0%
Security costs	1.6%	1.4%	1.5%	1.6%
Insurances	1.1%	0.9%	1.0%	1.1%
Professional fees and audit	0.4%	0.3%	0.4%	0.5%
Overhead wages and oncosts	13.7%	12.0%	13.0%	14.0%
Other overheads	1.6%	1.2%	1.5%	1.8%
Total overheads	**29.7%**	**25.8%**	**28.3%**	**31.0%**
Overall business measures:				
EBITDA	18.5% or higher	25% or higher	20%	17% or lower
Total remuneration	28% or lower	24% or lower	27%	30% or higher
Total AEMP	7% or lower	8% or lower	9%	10% or higher
Members per machine	90	110	95	85
EBITDA per member	$190	$300	$210	$150
EBITDA per machine	$18,000	$32,000	$21,000	$13,000

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Benchmarking Summary

- EBITDA on revenues ran at 18.8% Pre COVID, increased to 22.1% in 2020
- Sydney Groups are achieving better EBITDA levels than Regional NSW Groups with higher ADR levels
- Key differences in costs
  - AEMP went from 8.8% to 7.4%, REM 28.6% to 26.6%
  - But other overheads were harder to adjust down in 2020
- EBITDA is boosted when gaming revenue is over 70%
- Extra $50 ADR → +2% in EBITDA
- 3+ venues are harder to maintain efficiencies on EBITDA

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NSW Gaming Trends

2017 to 2021 - 5 Years of Data
Reported as Calendar Years
2 Years of COVID impact

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COVID Closure Dates NSW 2020 and 2021

- For ADR calculations we have adjusted for days closed

	2020											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
All of NSW				68 Days								

	2021											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Sydney Blue Mtns								107 Days				
Central Coast								107 Days				
Wollongong								107 Days				
Shellharbour								94 Days				
Tamworth									64 Days			
Rest of NSW									58 Days			

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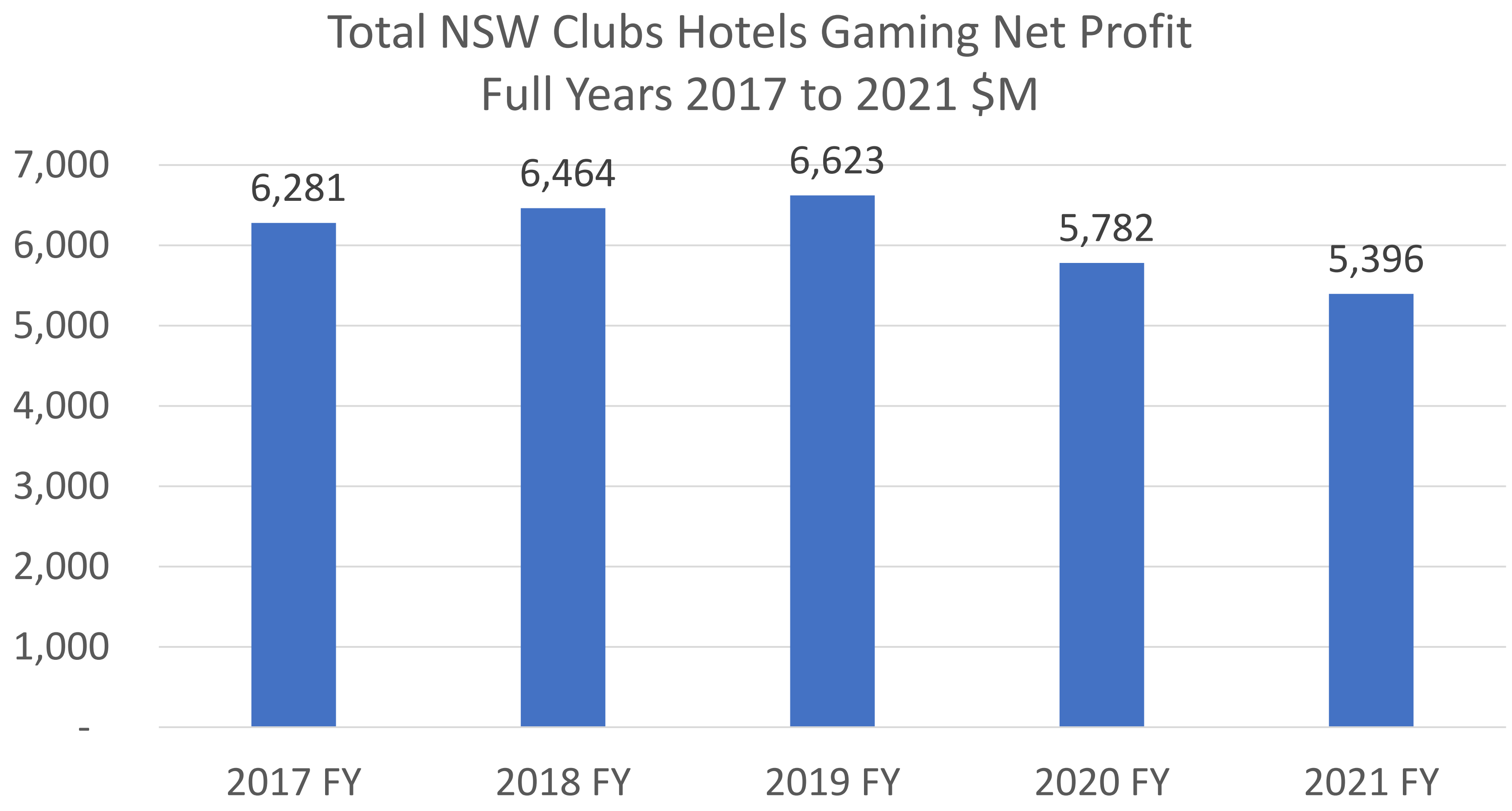
Clubs & Hotels - Total NSW Annual Gaming Trend



2018 FY	2019 FY	2020 FY	2021 FY
+2.9%	+2.5%	-12.7%	-6.7%

- Growth of 2.5-2.9% prior to COVID
- 2020 COVID drove 12.7% decline
- 2021 COVID drove a further decline of 6.7% vs 2020
- 2021 18.5% decline vs 2019

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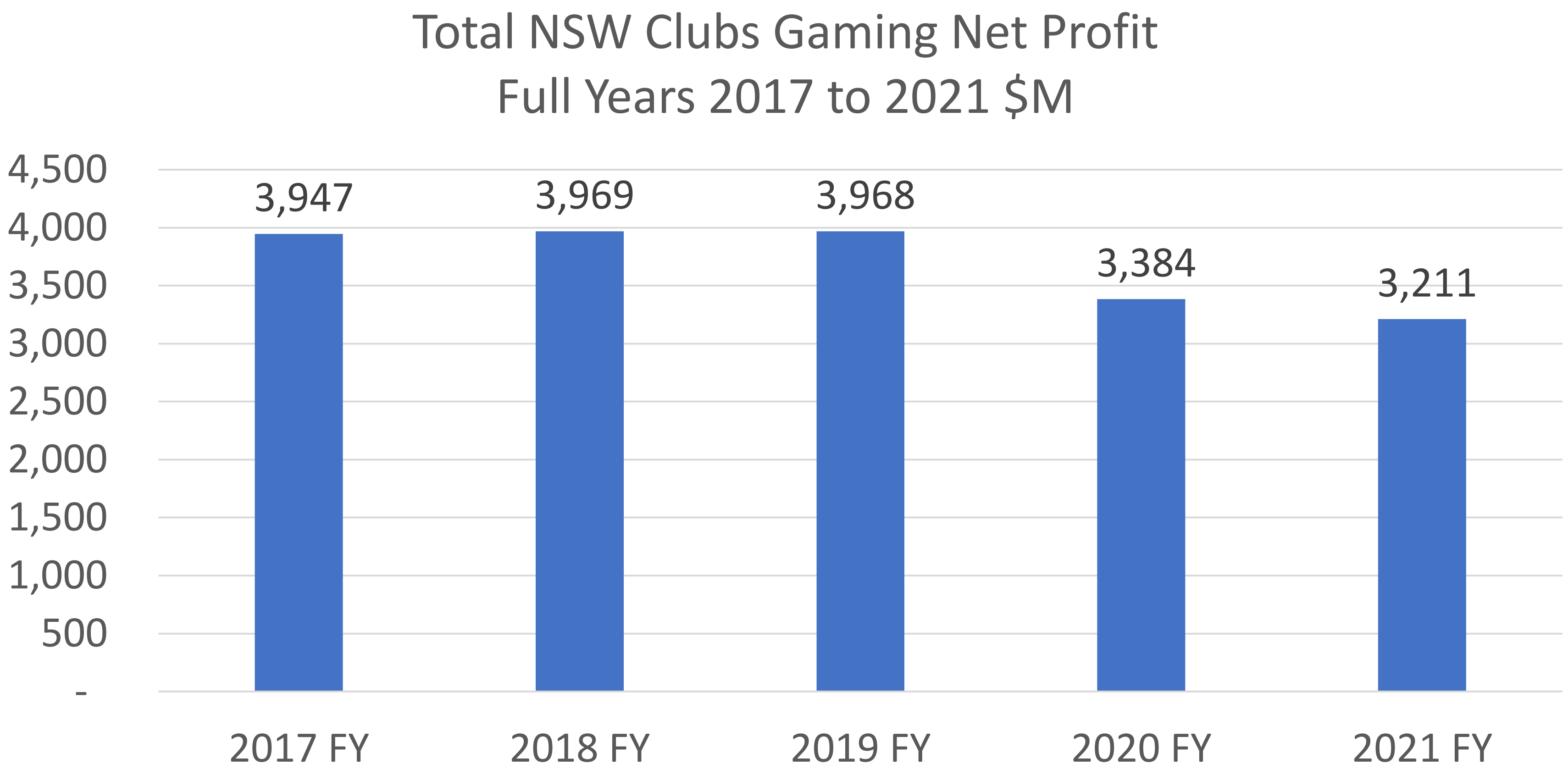
Clubs Total NSW Net Gaming Profit Trend



	2018 FY	2019 FY	2020 FY	2021 FY
Growth	0.6%	0.0%	-14.7%	-5.1%

- Marginal growth of 0%-0.6% prior to COVID
- 2020 COVID Drove 14.7% decline
- 2021 COVID drove further decline of 5.1%

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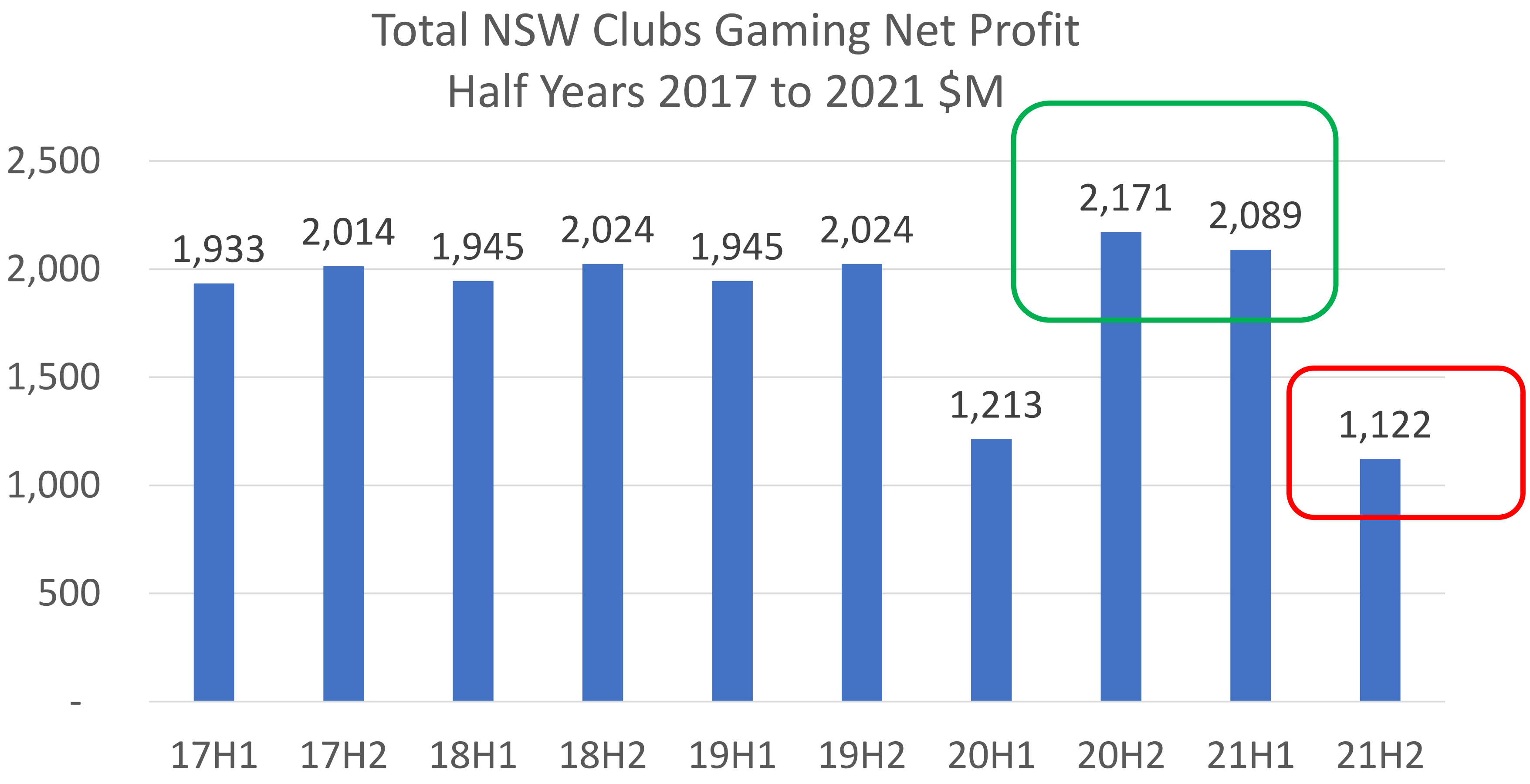
Clubs Total NSW 6 Monthly Gaming Net Profit



- Growth of 0% to 0.6%% Pre-COVID
- Record 6 monthly highs in 20H2 & 21H1
- 21H2 significantly impacted by COVID -48% vs year ago

	18H1	18H2	19H1	19H2	20H1	20H2	21H1	21 H2
Growth	0.6%	0.5%	0.0%	0.0%	-37.6%	7.3%	72.3%	-48.3%

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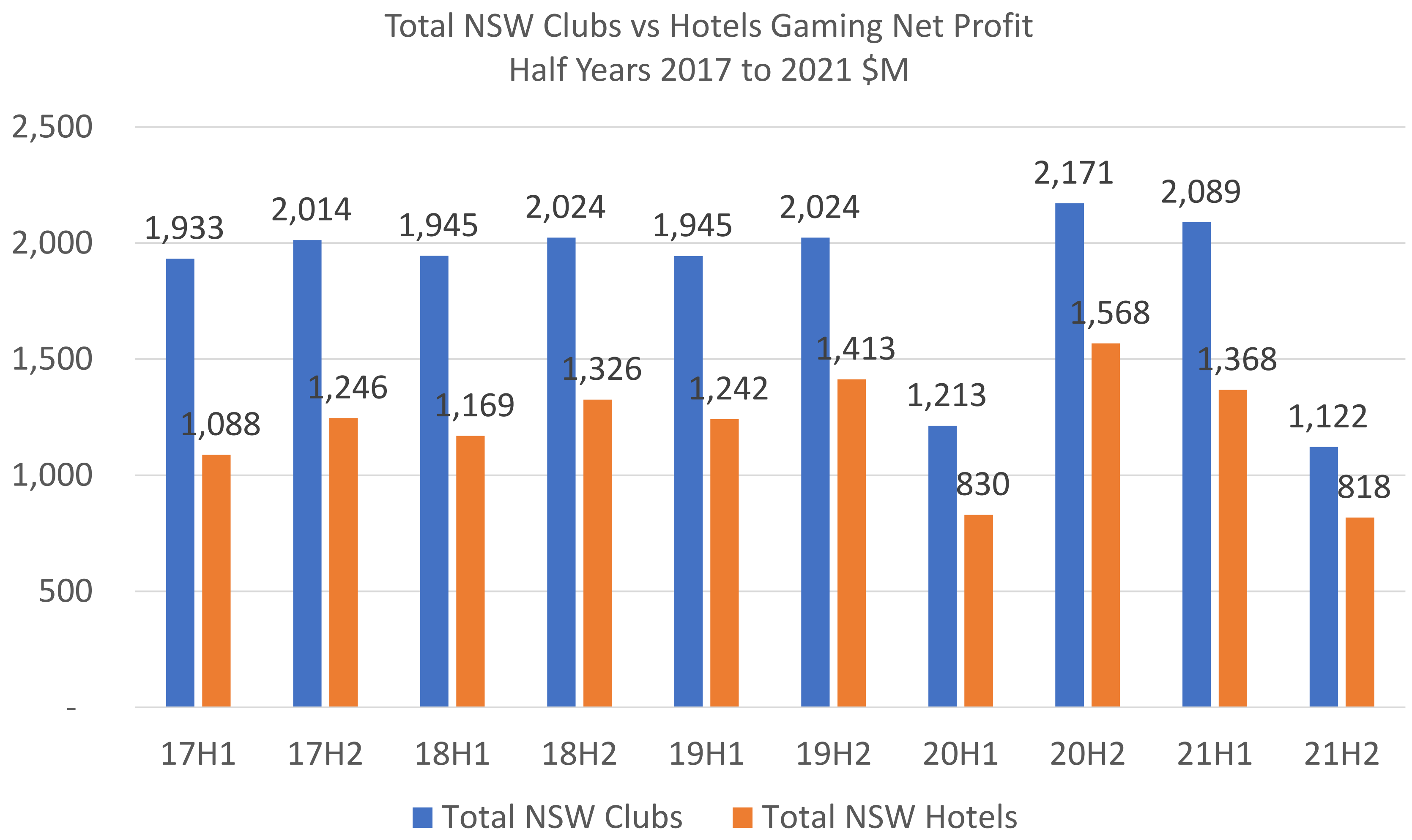
Total NSW Clubs & Hotels 6 Monthly Gaming Trend



- Prior to COVID clubs were stable while hotels were growing at 6% to 7%
- Clubs and hotels both had strong 6 monthly periods in between the lockdowns
- 21H2 vs 19H2 clubs were down 45% while hotels were down 42%

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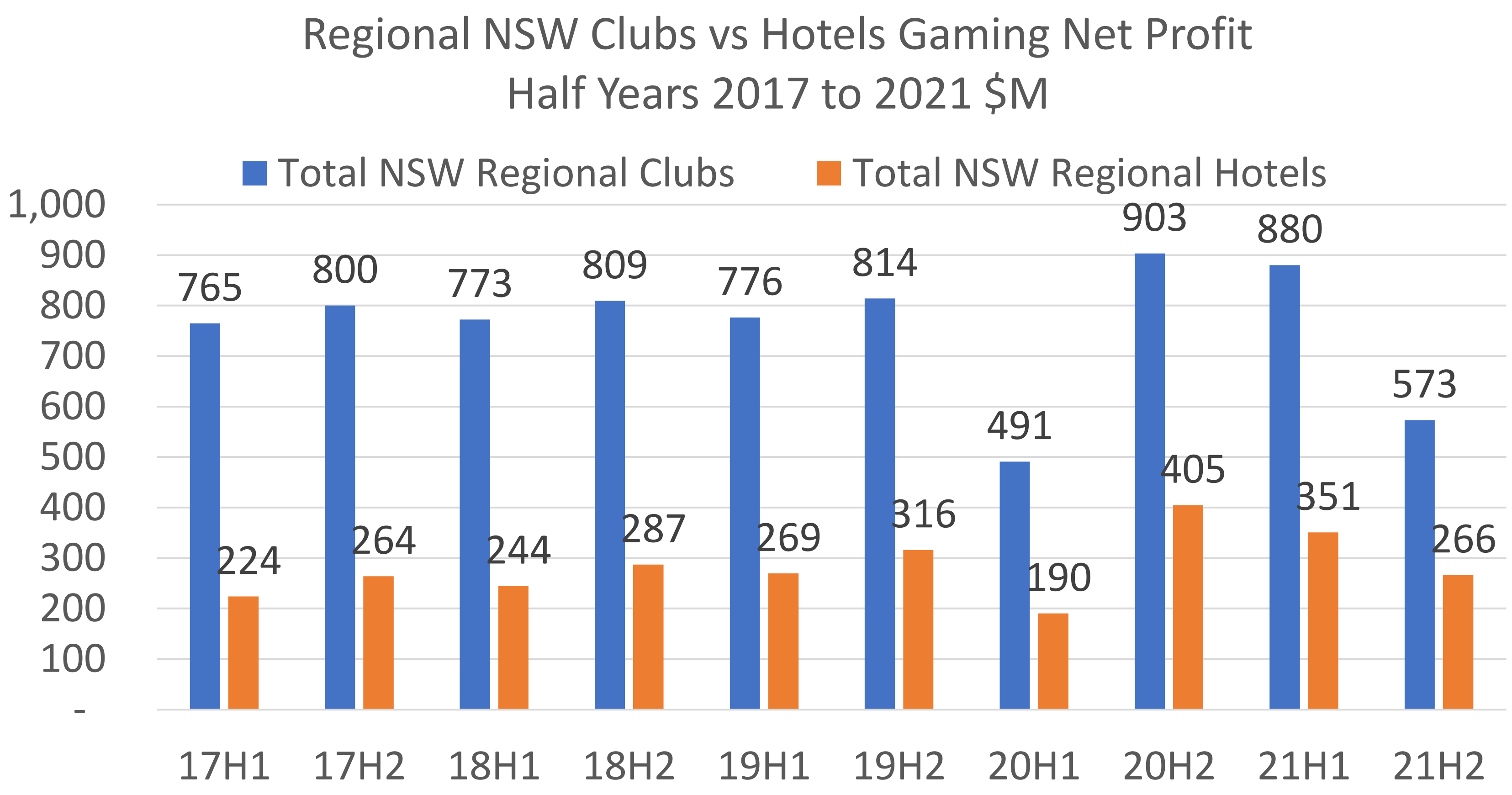
Regional NSW Clubs & Hotels 6 Monthly Gaming Trend



- Prior to COVID Regional clubs were flat while hotels were growing at 9% to 10%
- Clubs and hotels consecutive record 6 monthly periods in between the lockdowns
- 2021 lockdown less severe than 2020 likely showing member resilience after reopening

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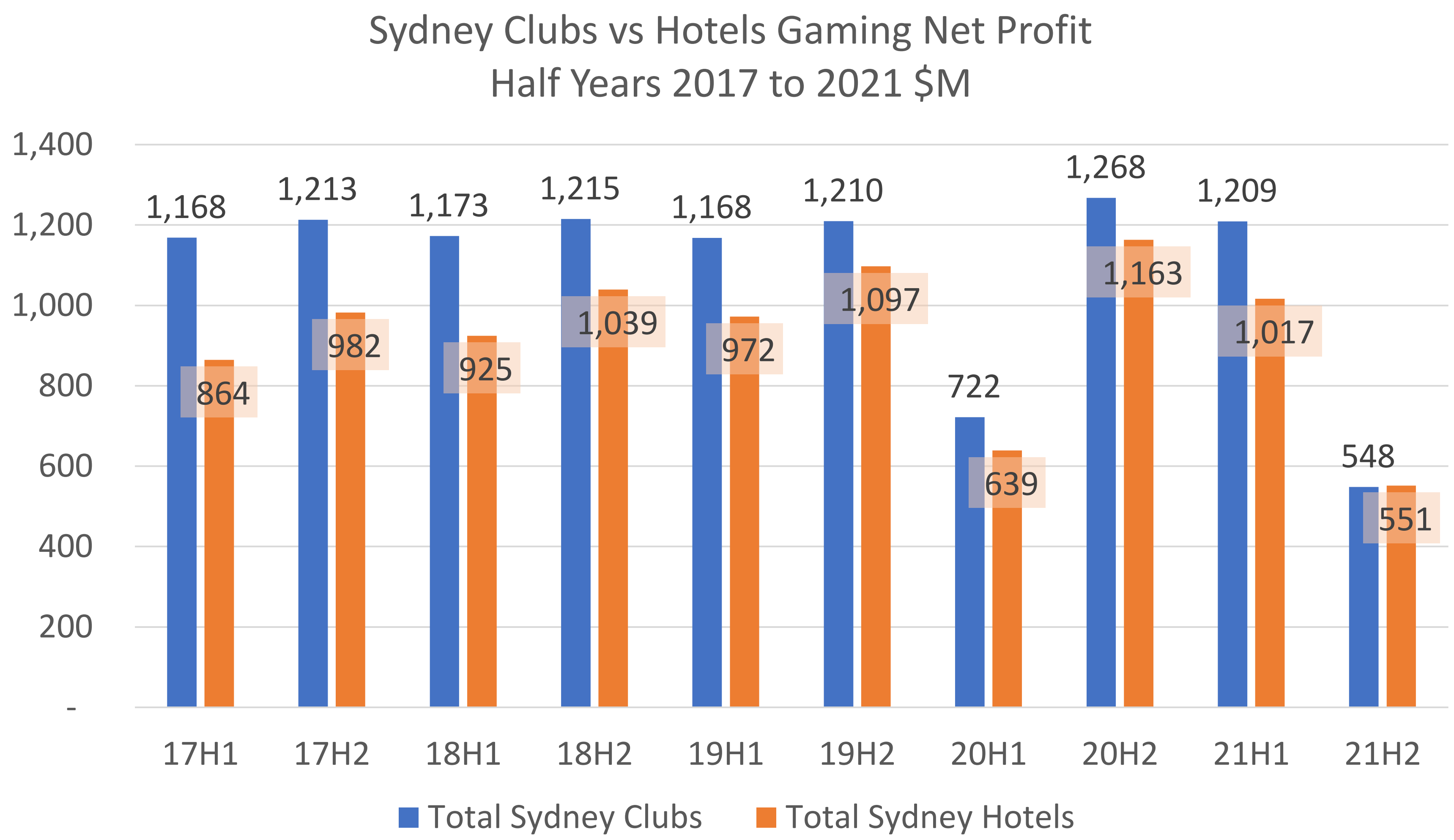
Sydney Clubs & Hotels 6 Monthly Gaming Trend



- Prior to COVID Sydney clubs were flat while hotels were growing at 5% to 7%
- Clubs had consecutive record 6 monthly periods in between the lockdowns
- Hotels had a record half in 20H2 but fell in H2 2021
- 2021 lockdown longer 107 days so more severe than 2020

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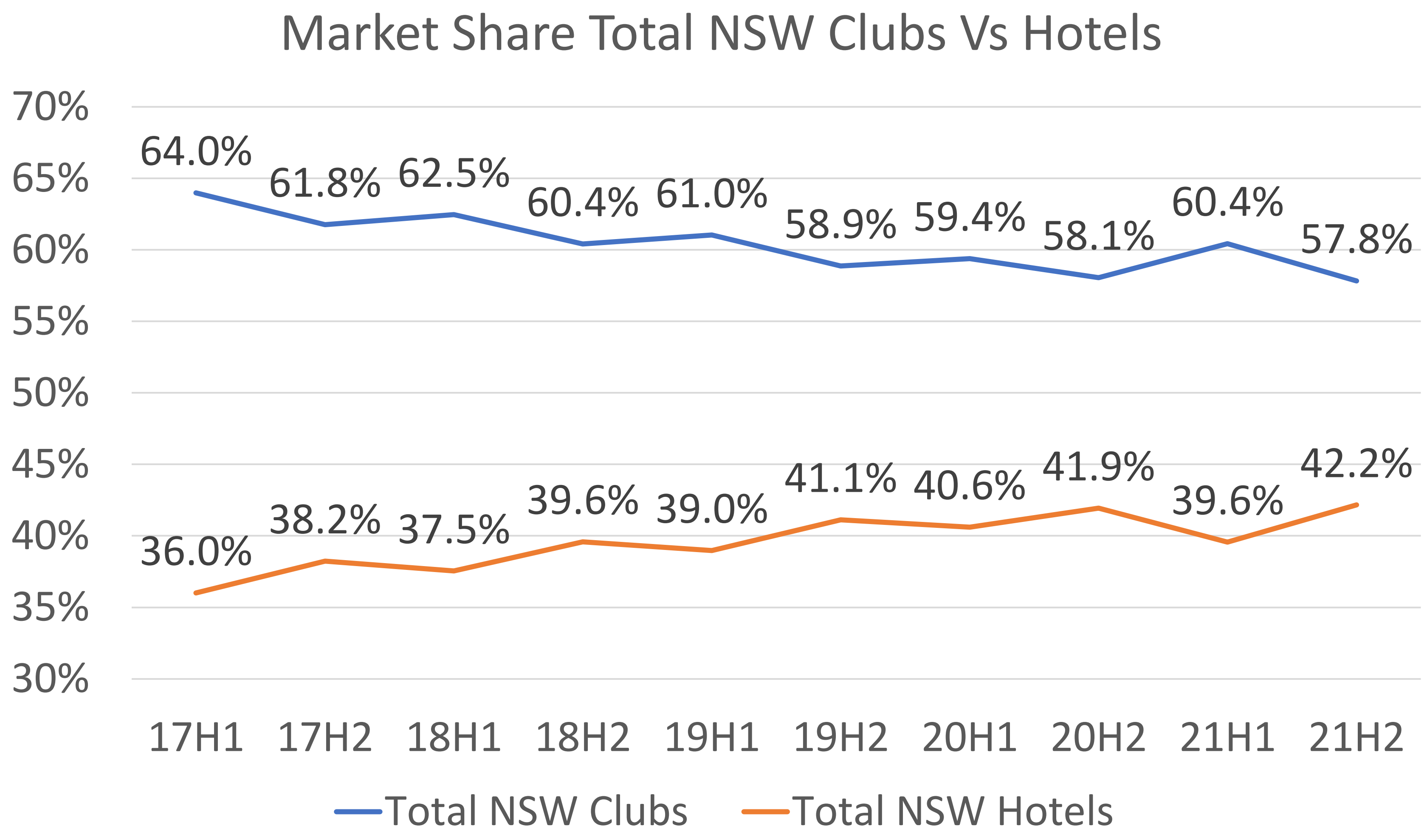
Total NSW Market Share Clubs vs Hotels



- Steady trend of clubs losing share to hotels, 6% share lost in 5 years
- Every 1% market share is $66M in revenue
- Increase of club's market share in 2021 H1 reversed in 2022 H2
- Continuation of this trend for 5 more years would see a loss of $330m from clubs to hotels

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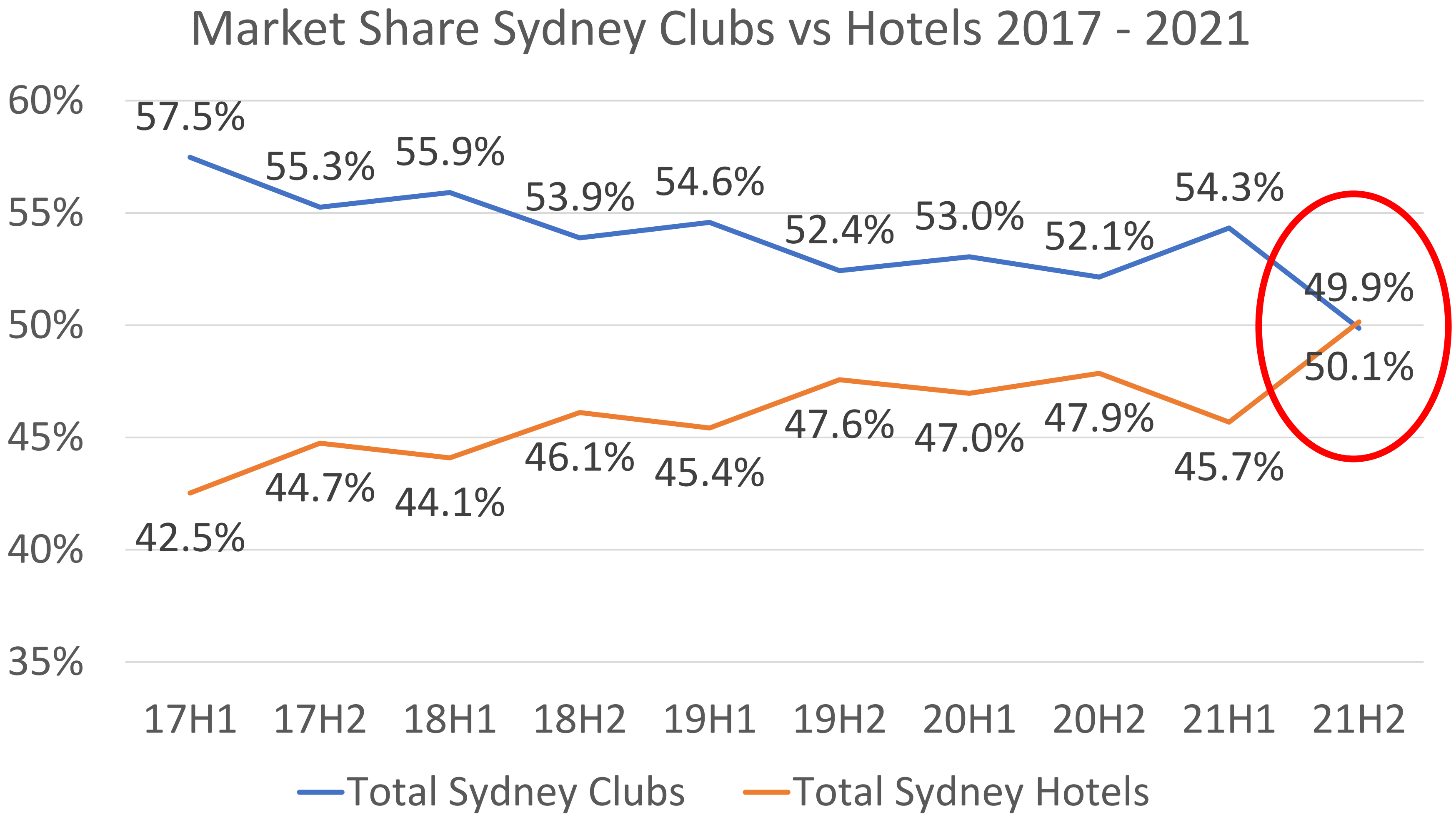
Sydney Market Share Clubs vs Hotels



- Market share convergence - spike in hotels share now at 50% vs clubs
- Increase of club's market share in 2021 H1 reversed in 2022 H2
- Sydney Clubs call to action to understand and counter this concerning trend

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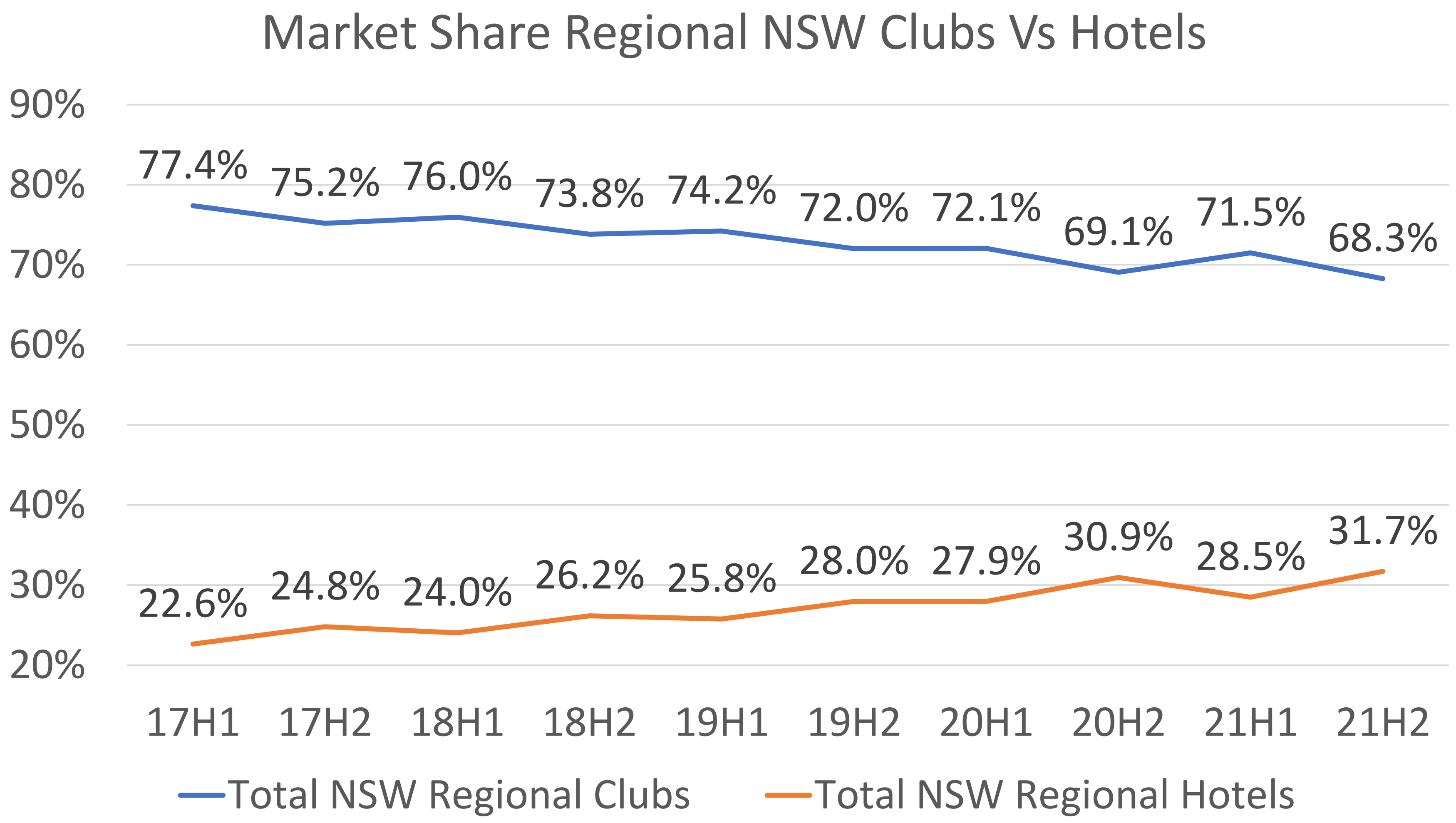
Regional NSW Market Share Clubs vs Hotels



- Steady trend of clubs losing share to hotels
- Increase of club's market share in 2021H1 reversed in 2022 H2
- Regional clubs still dominant and should be focusing on how to compete with hotels while still dominant

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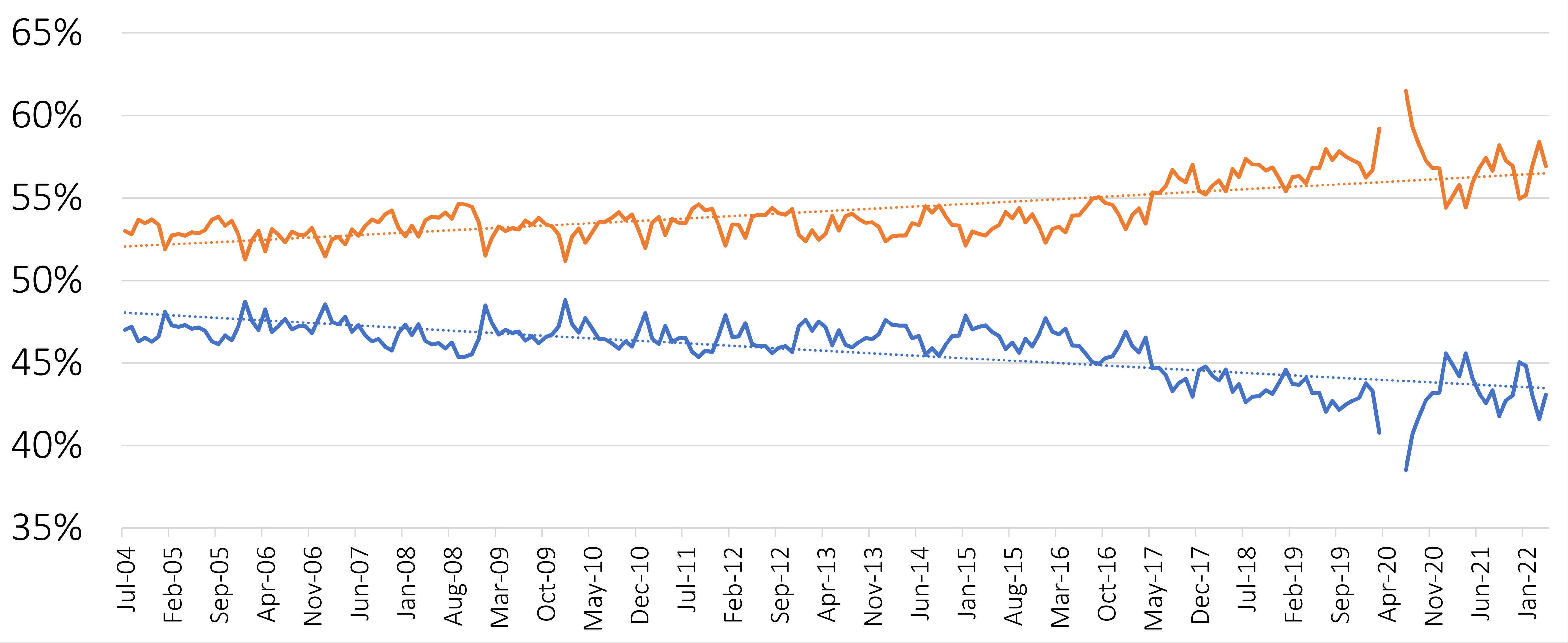
Qld is worse



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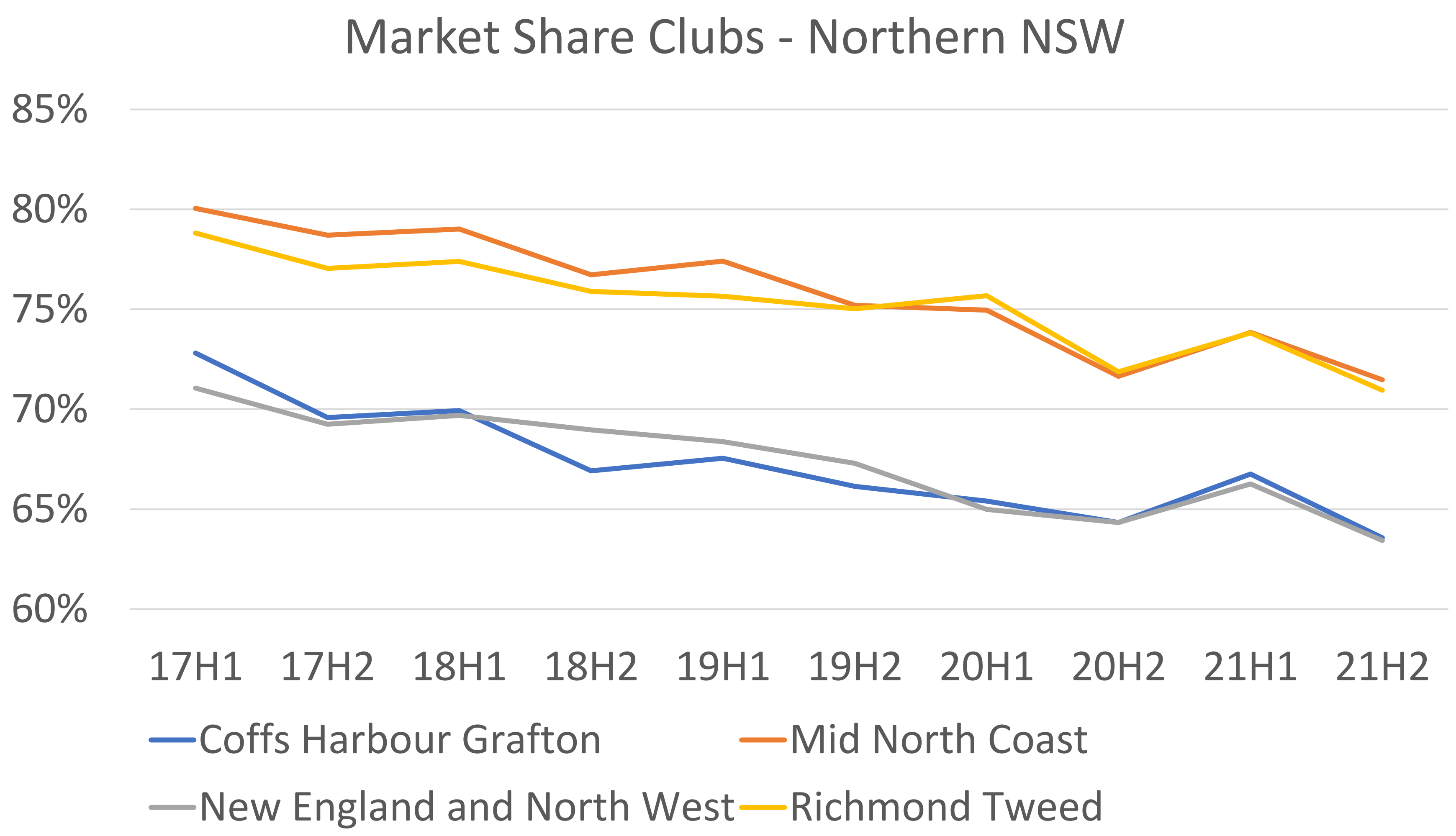
Market Share – NSW Regions



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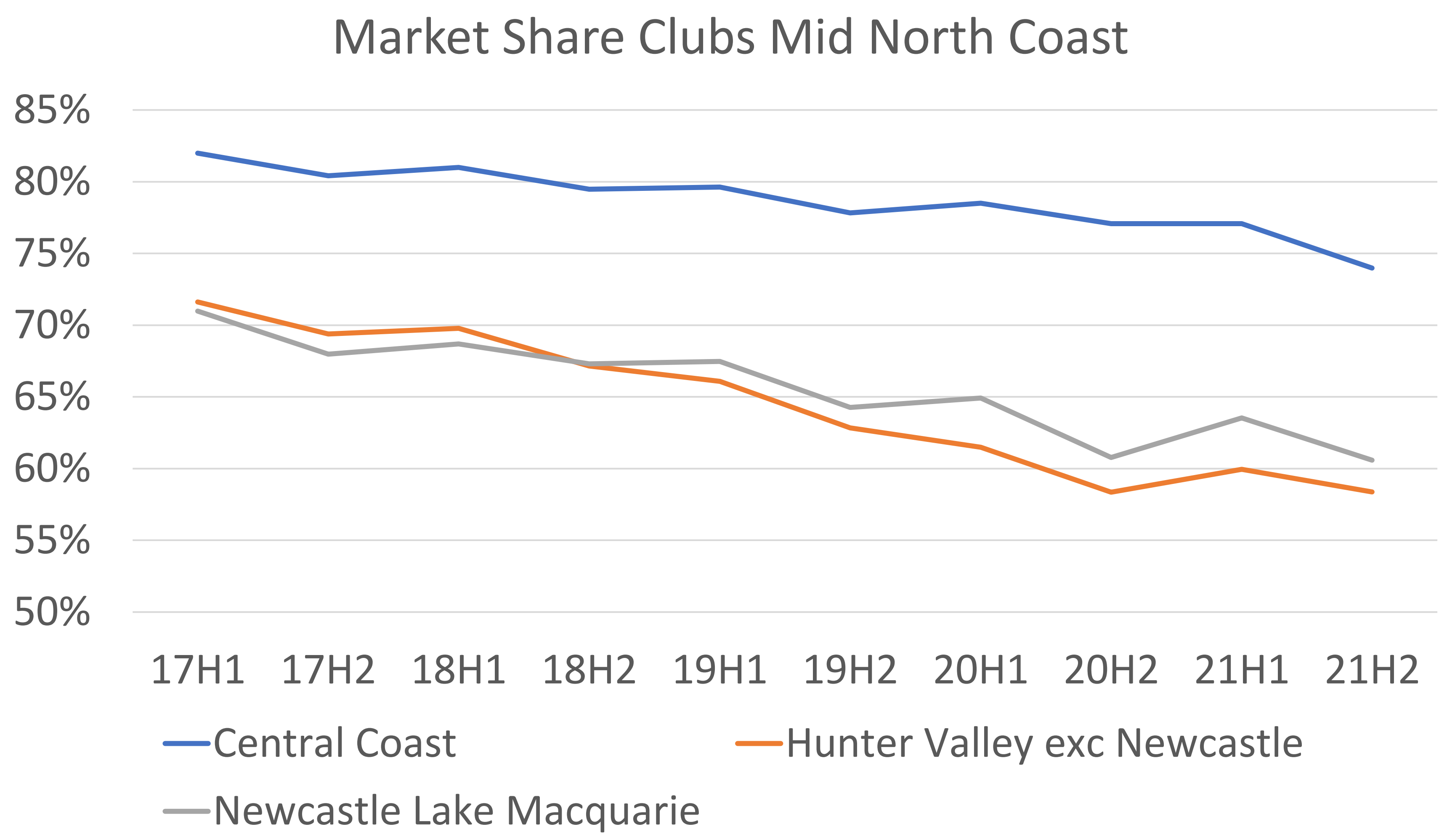

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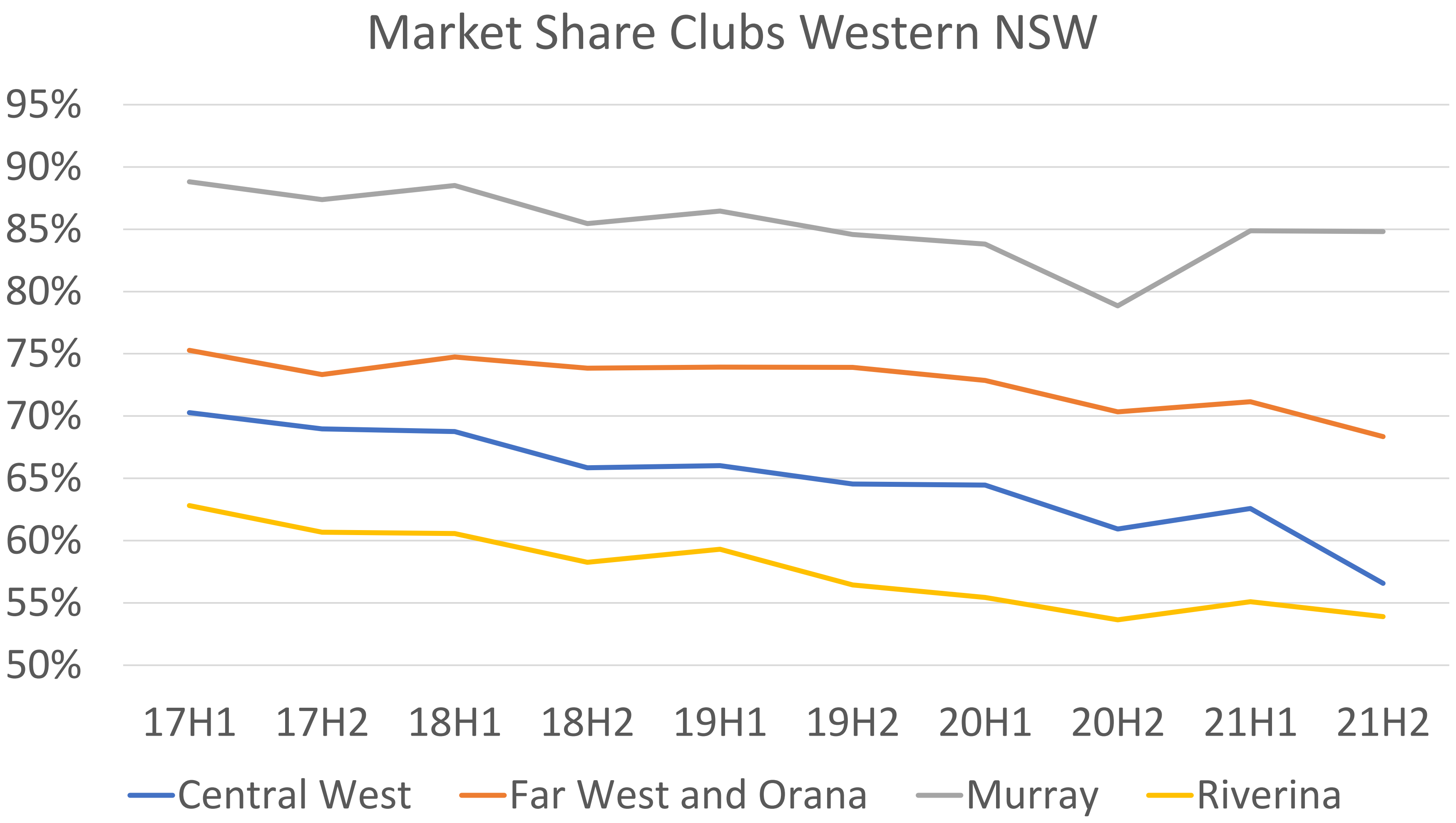

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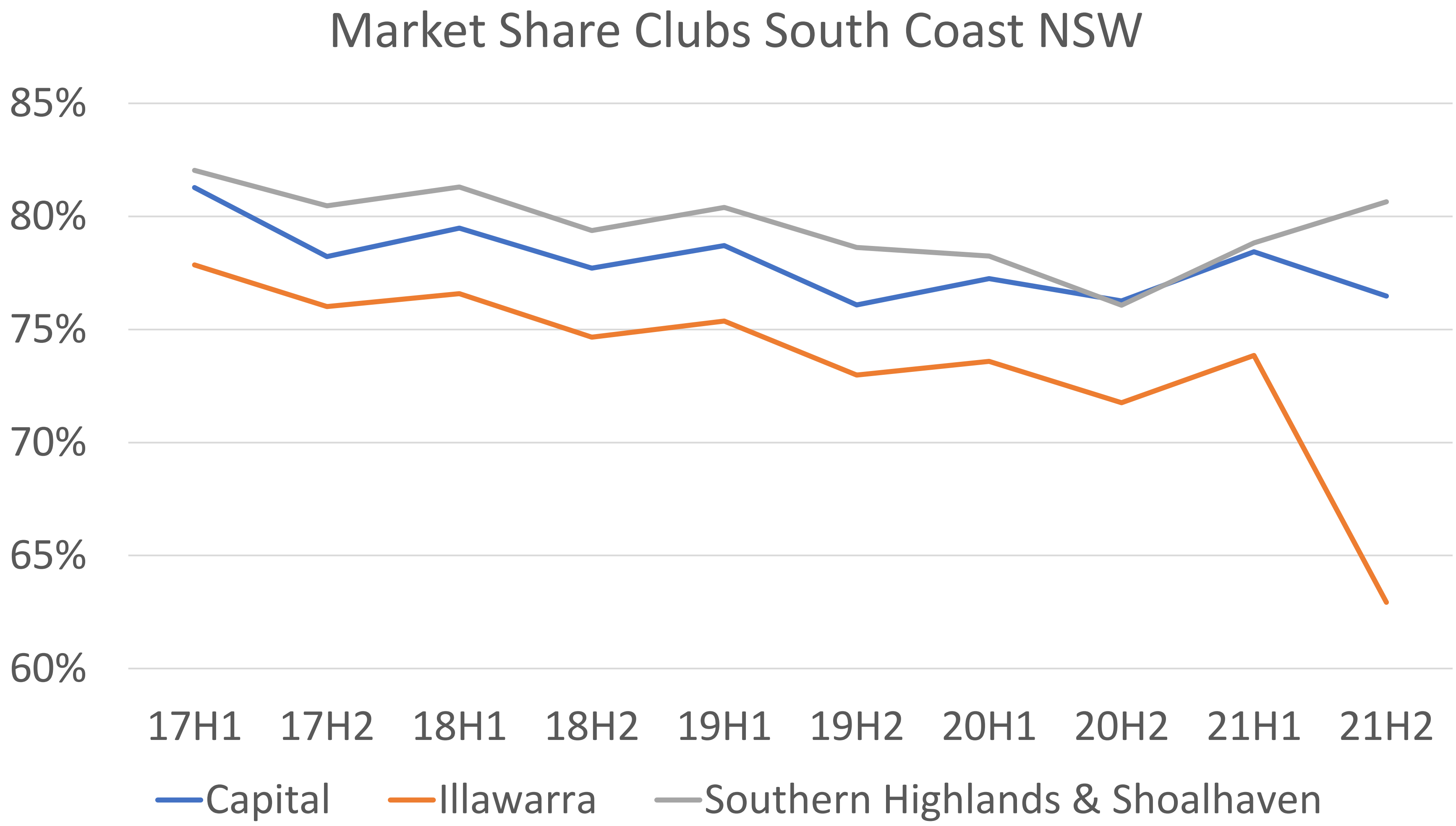

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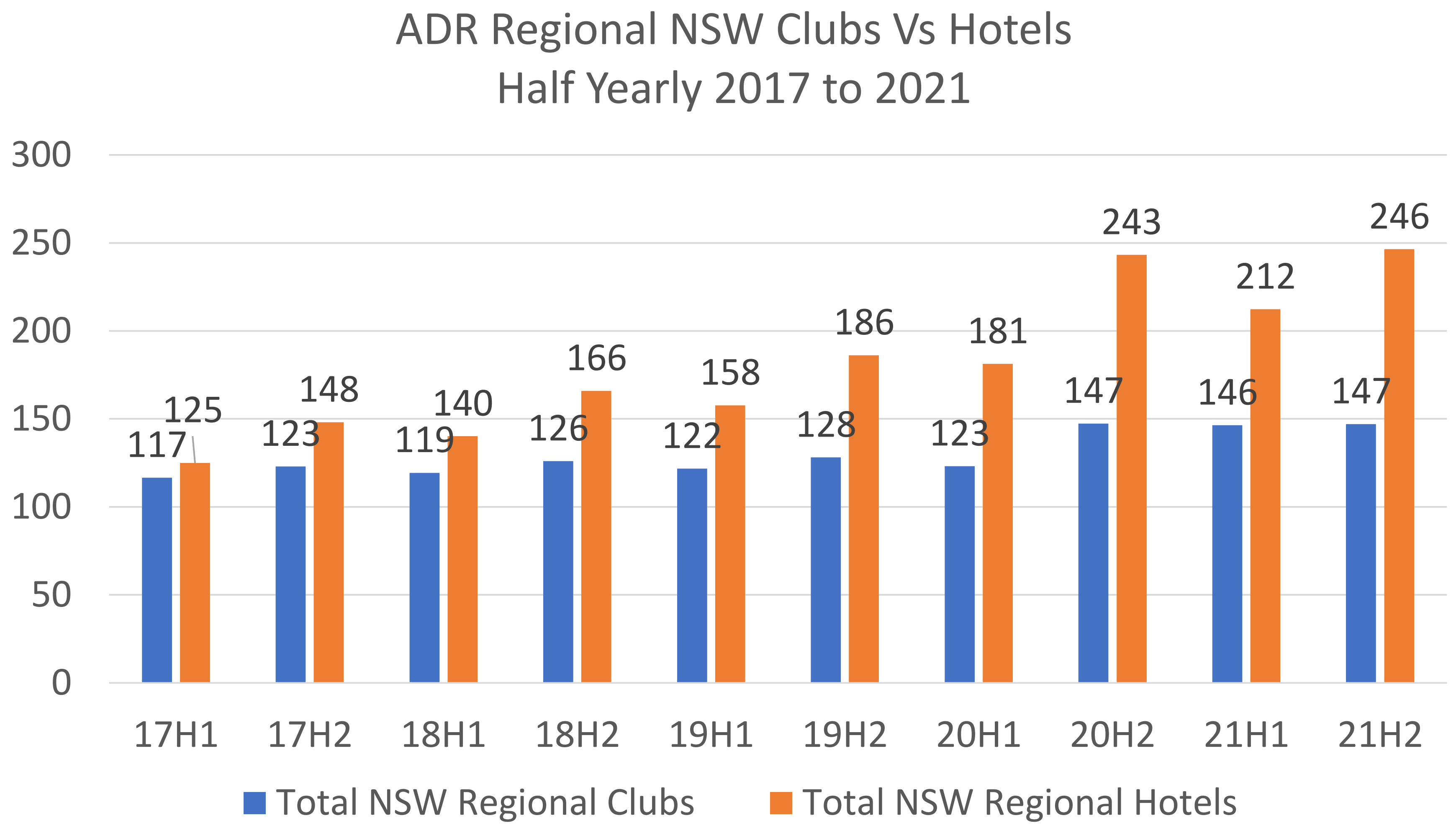
Regional NSW Clubs vs Hotels ADR - 6 Monthly



- Hotel ADR 1.7 times clubs
- Hotel ADR significant growth now at $246 +97% over 5 years
- Hotels ADR's have spiked since 2020 H2 – Clubs need to understand drivers to compete
- Clubs ADR now $147 +26% over 5 years
- COVID lockdowns not impacting ADR's due adjusting for days closed

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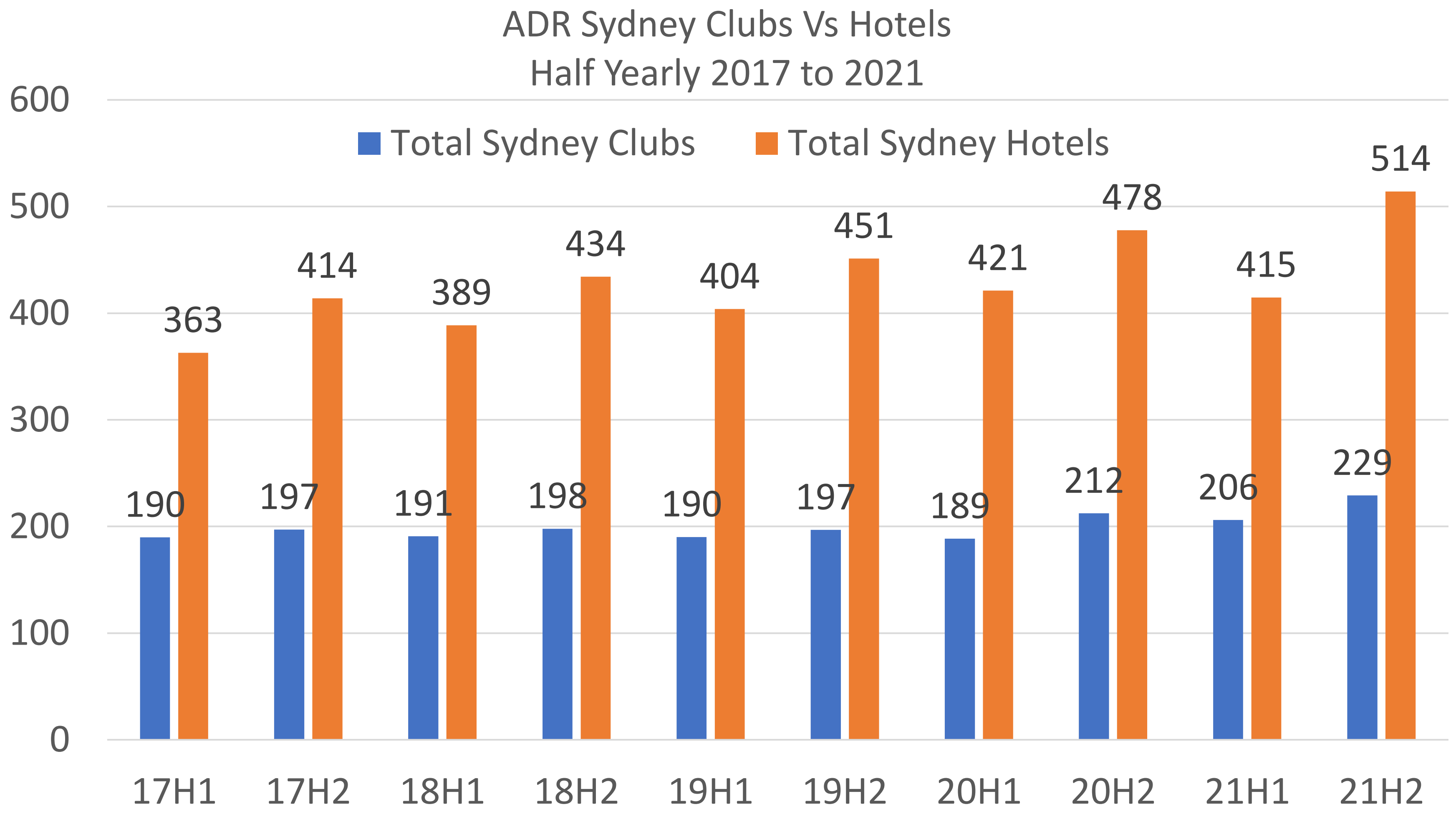
Sydney Clubs vs Hotels ADR - 6 Monthly



- Hotel ADR 2.2 times clubs
- Hotel ADR significant growth now at $514 +42% over 5 years
- Clubs ADR now $229 +21% over 5 years
- COVID lockdowns not impacting ADR's due adjusting for days closed
- Pent up demand - members appear to betting more when clubs re-open

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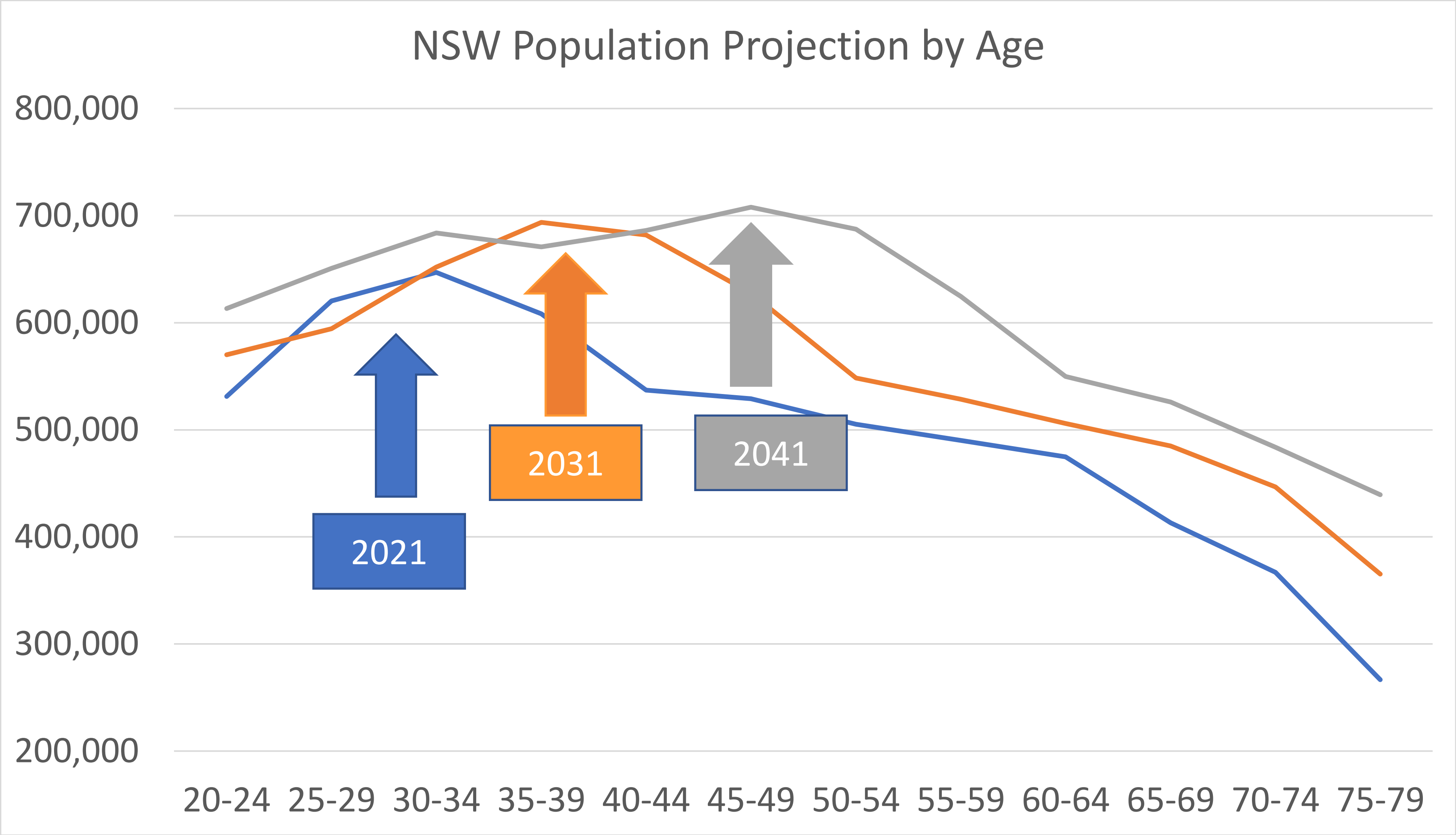
10 – 20 year Demographic Trends will favour clubs



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Executive Summary – Gaming NSW

- Industry gaming low growth 2017 – 2019
- COVID closures 68 days 2020 and 58-107 days in 2021 drove overall decline of 19% vs 2019
- 2021 Gaming revenue similar to 2020 despite longer lockdowns
- Record trading in between the 2 lockdowns with clubs gaining share on hotels in this period
- Long term trend of hotels gaining share over clubs in all areas. Sydney clubs and hotels market share convergence now at 50%
- ADRs have grown during COVID showing the resilience of gaming
- Hotels ADRS significantly higher than clubs and growing faster

Key focus for clubs industry should be on understanding why hotels are growing faster than clubs and how to compete against this

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Research Program

Club Member Visitation Survey

Remuneration Survey

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National Club Member Visitation Survey Opportunity

National Online Industry Member Survey

Target 100,000 responses

Opportunity to Understand Members Behaviours Attitudes and Intentions

COVID
Impact and related Drivers of Club Visitation

Aggregated Results National and by State
For Benchmarking

Private club specific report and consultation

Survey Participation Target

State	Minimum No. Clubs	Ideal No. Clubs
NSW	20	40
Vic	10	20
Qld	10	20
ACT	5	8
Total	**45**	**88**

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Club Member Visitation Survey Insights

Club visitation (frequency and recency)

Future intentions

Visitation to other clubs, hotels, casinos visited

Propensity to recommend club to friends (Net Promoter Score)

Analysis to be segmented by member demographics and spend levels

Visitation drivers for clubs, differentiating factors

Ratings of COVID safe practices

Facility usage

Ratings of club facilities and experience

Spending behaviour and general behaviours

Another Invitation to join the survey will be sent out

Investment per venue
$3,500 first venue
$2,250 – $3,300 for subsequent venues

We look forward to your support and participation

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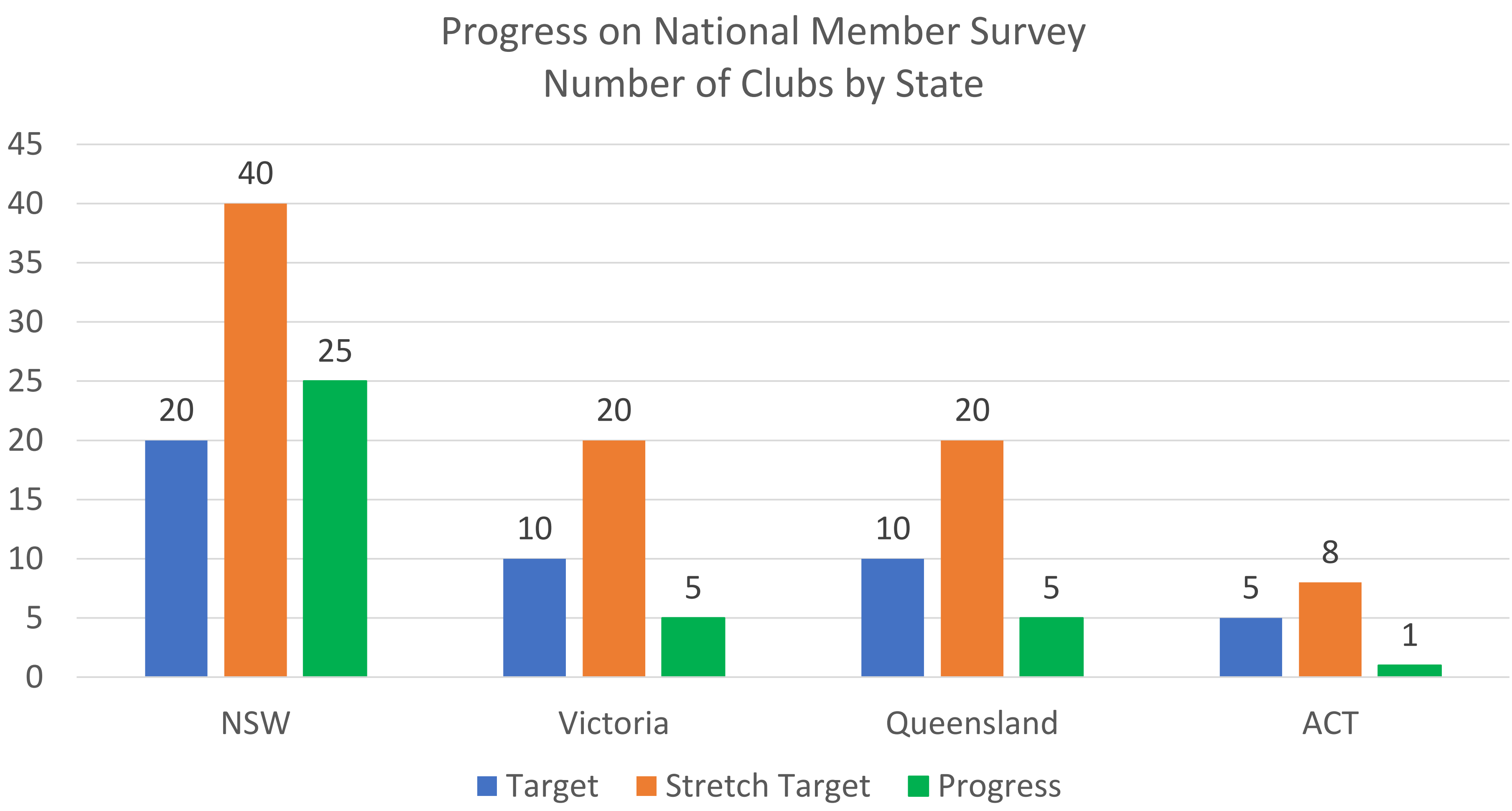
National Member Survey Progress



- Total 31 vs target of 45 after just 2 months
- NSW participation ahead of target and potential to reach stretch target
- Victoria strong support with introductions from CMA
- Qld recruitment drive via Geoff Wohlsen
- ACT – next focus

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National Salary/Remuneration Survey

- National Survey to provide salary/remuneration insights to the industry.
- Important timing given current challenges of recruiting and retaining staff.
- Completed by CEO or their delegate.
- Provided free of charge by Wohlsen Consulting.   Confidentiality guaranteed.

Positions Included

CEO or General Manager
Assistant General / Operations Manager
Finance Manager
Gaming Manager
Food and Beverage Manager
Marketing Manager
Human Resource Manager
Head Chef
Second/Sous Chef
Duty Manager

Information Surveyed

Salary
Annual Bonus
Other Benefits

Please support your industry by participating

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Wohlsen Consulting Services

- Planning – strategic, business and project
- Research – consumer, member, staff/personnel, marketing, culture
- Finance – accessing finance, feasibility, ROI
- Operations – management structure, profitability, marketing audit
- Governance review, policy development, constitution review

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Thank you

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Clubs Vs Hotels
Market Share Trends

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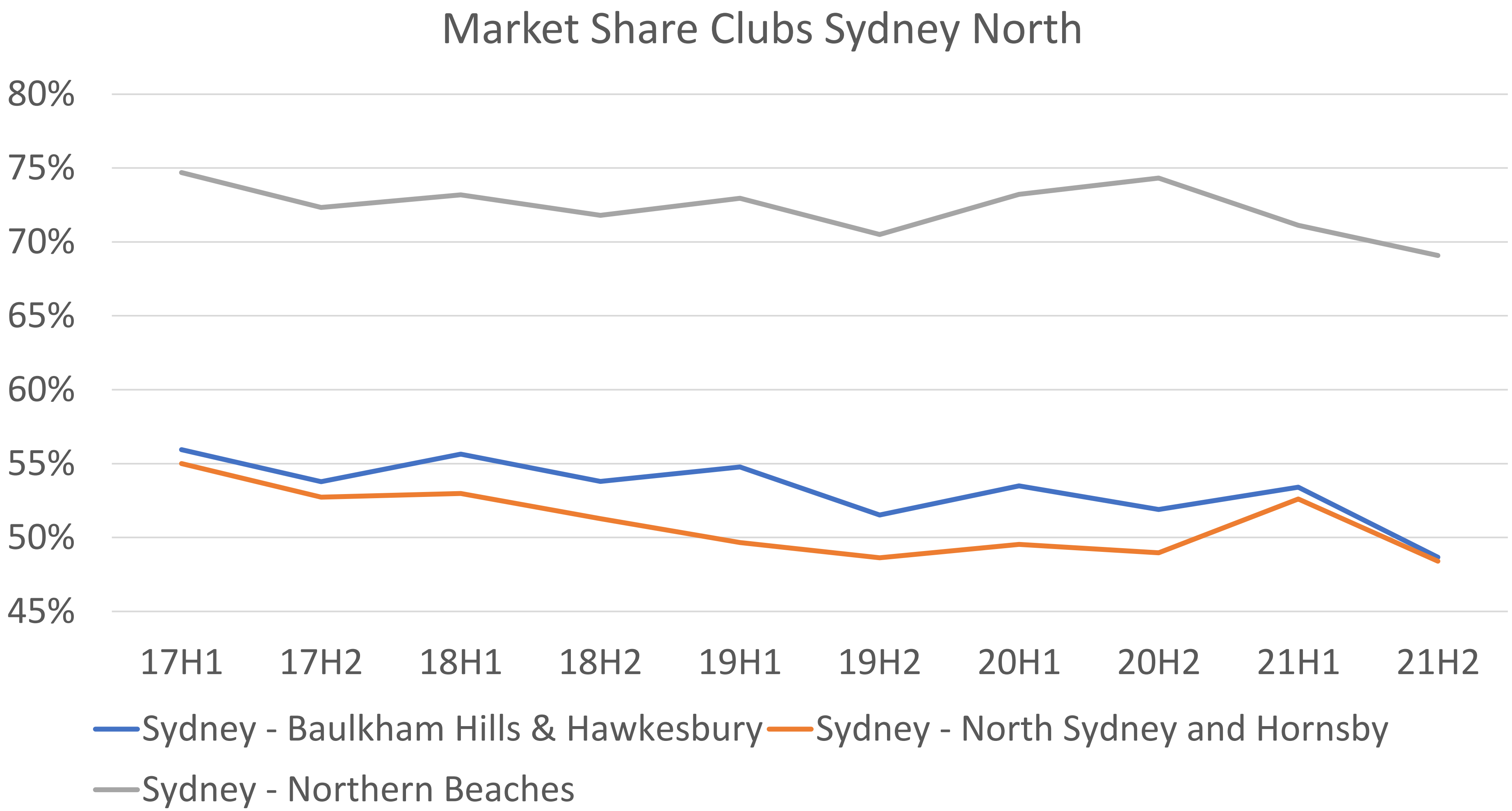
Market Share Sydney Regions



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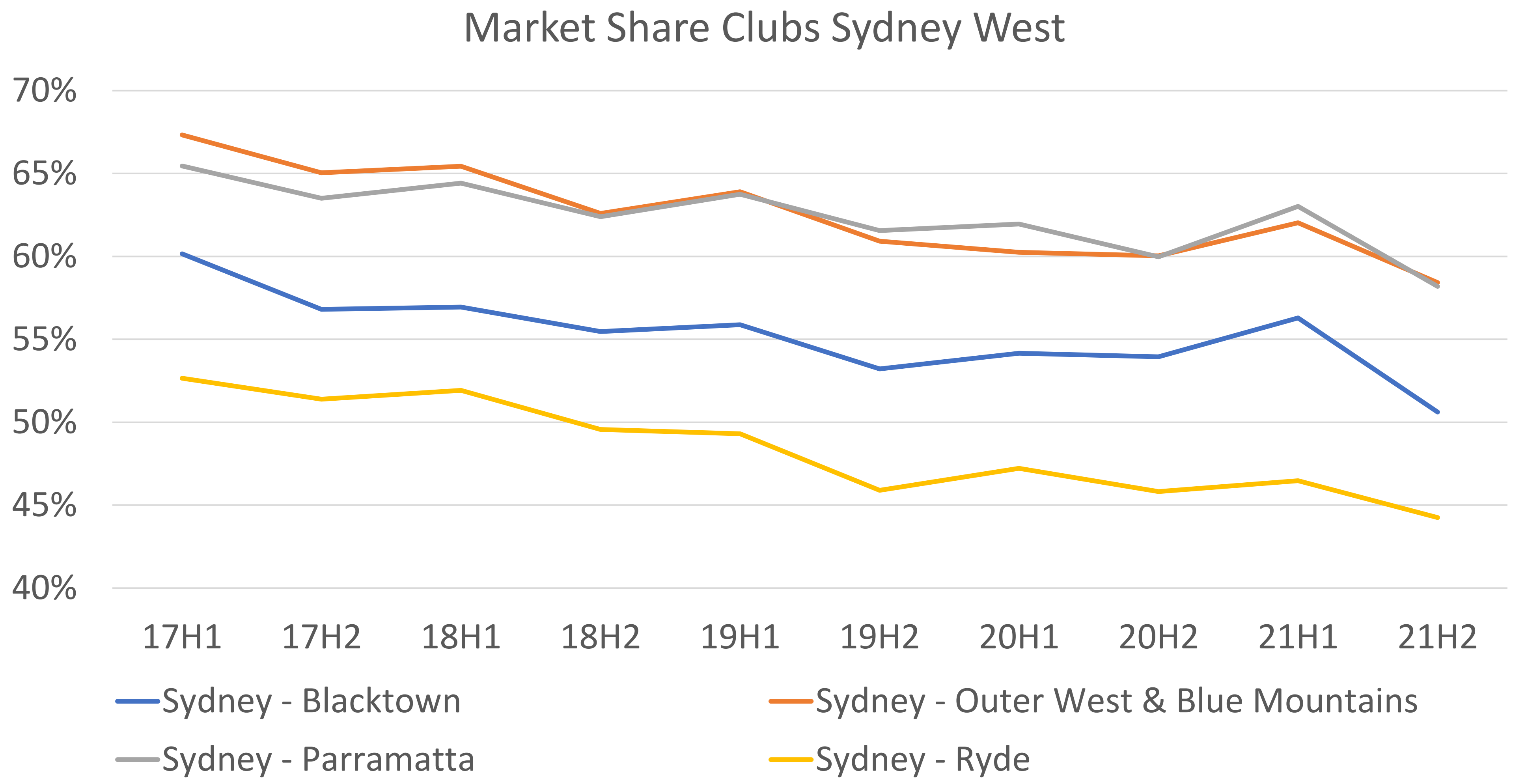

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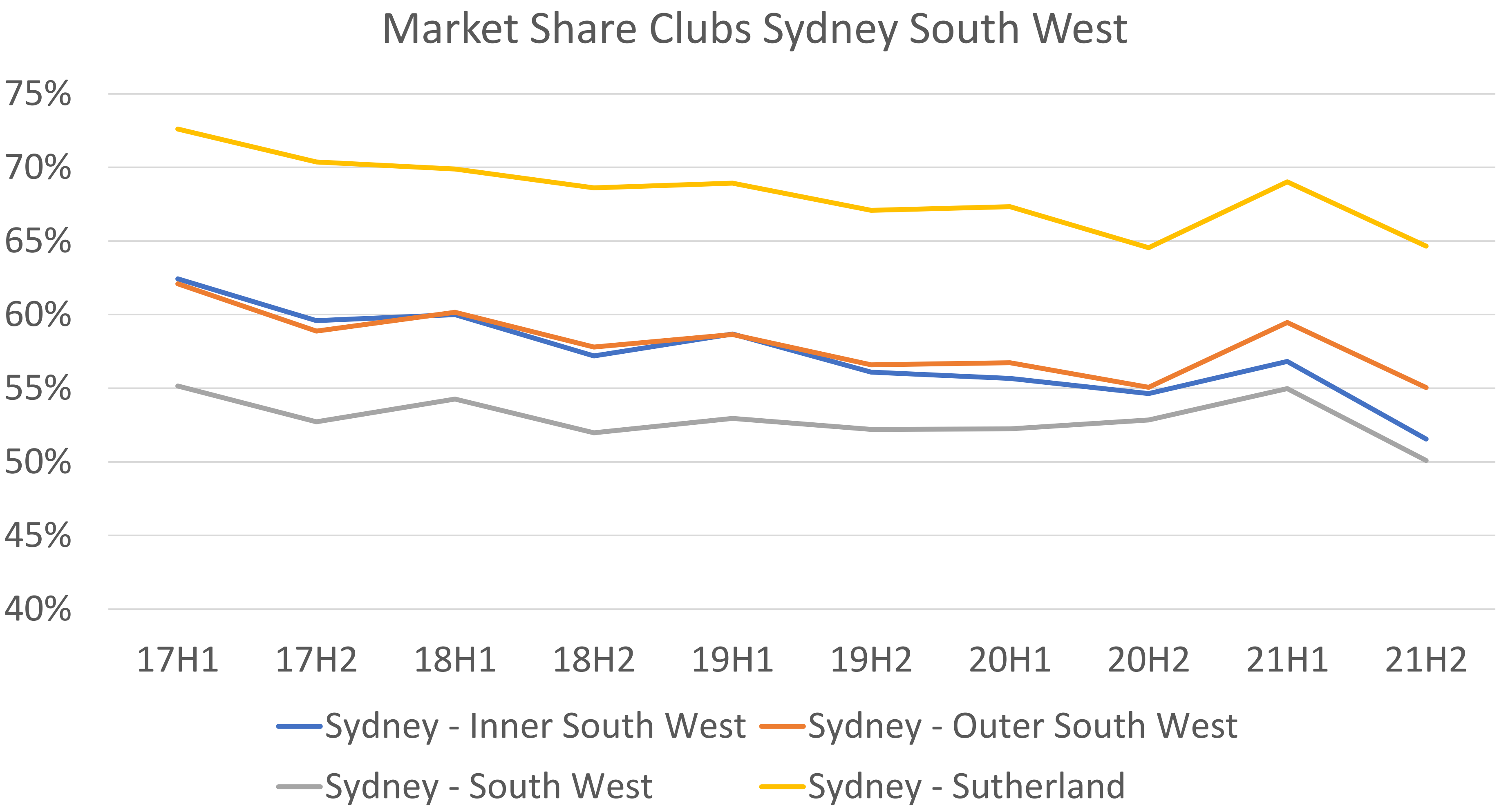

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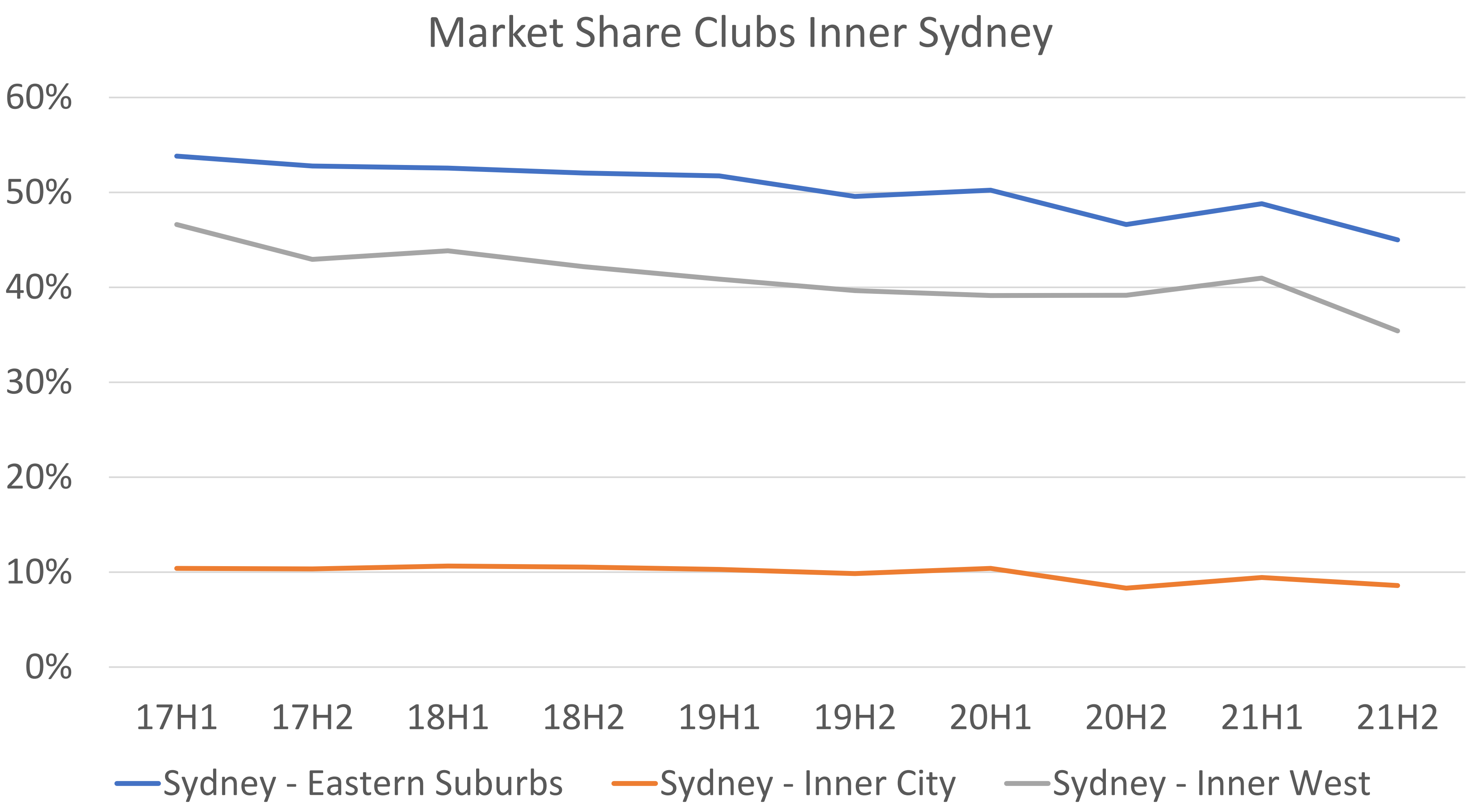

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Clubs Vs Hotels Machine Numbers

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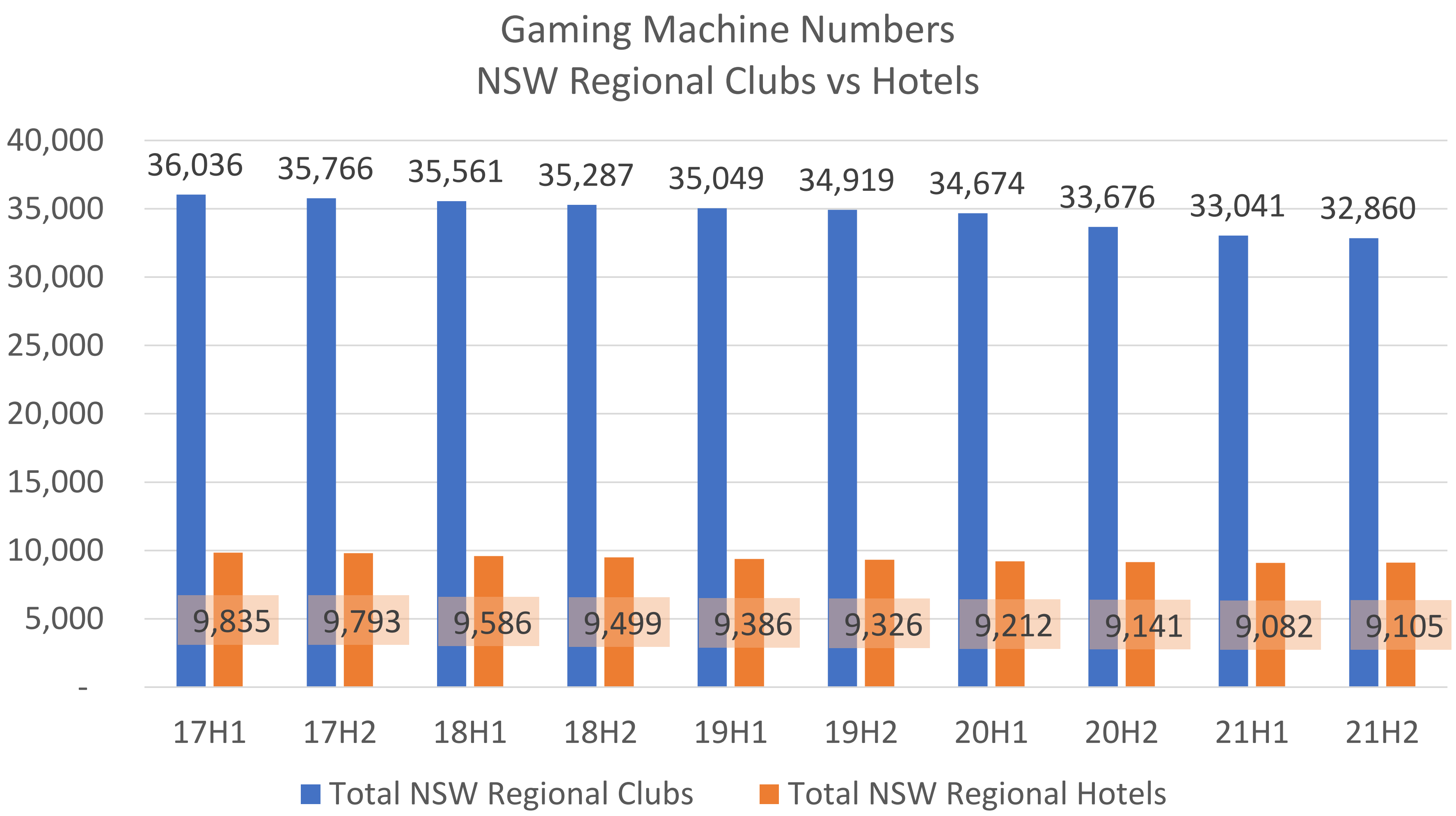
Regional NSW Gaming Machine Numbers Clubs vs Hotels



- Machine numbers down by 9% for clubs and 7.5% for hotels
- Industry appears to be pursuing efficiency in machine numbers

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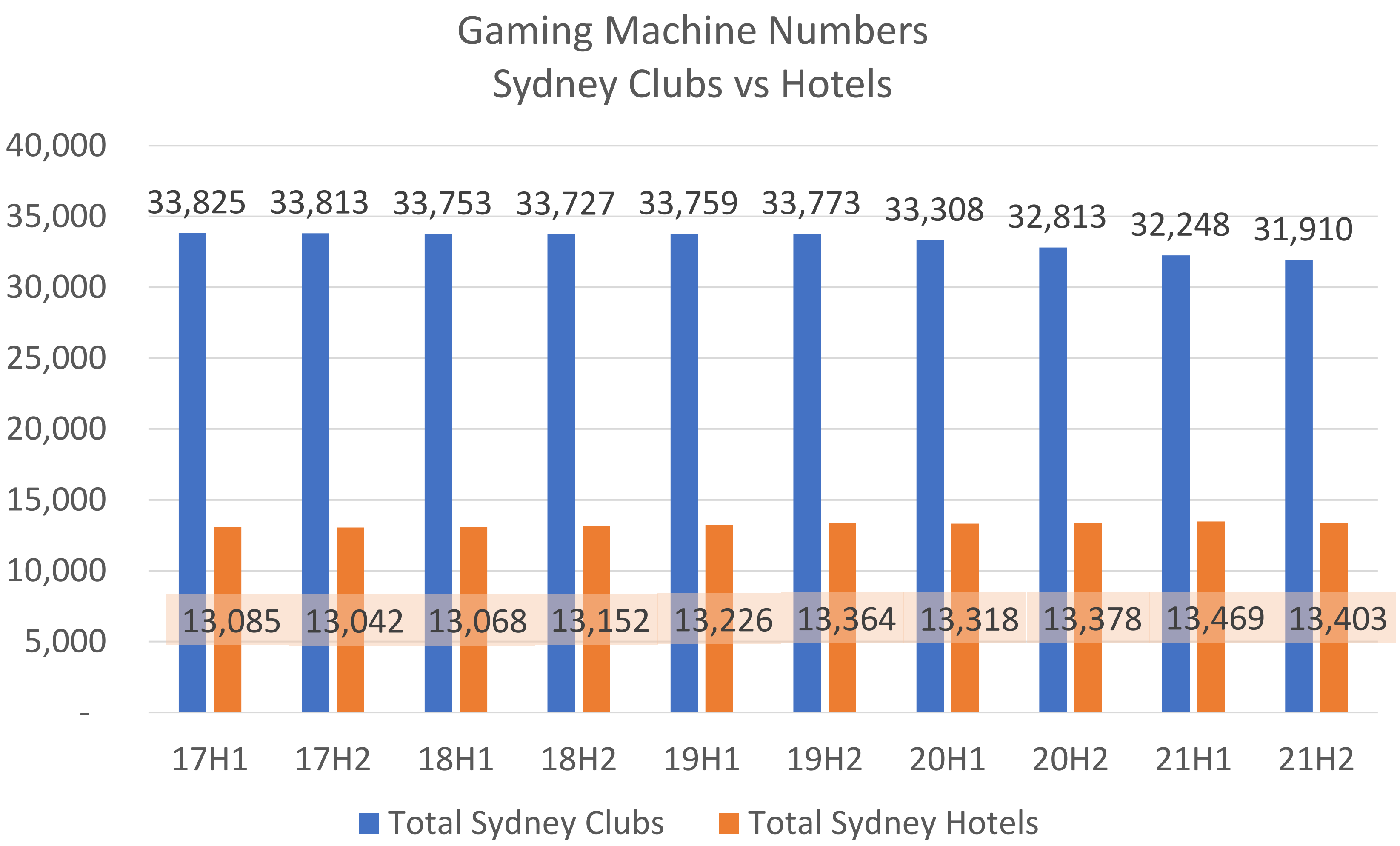
Sydney Gaming Machine Numbers Clubs vs Hotels



- Sydney Clubs -6% while Sydney Hotels + 2.4%

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