

# Gaming and Gambling Industry Expertise

## Economic & Financial Consulting

FTI Consulting has a highly experienced team of advisers to regulators and operators in gaming and gambling markets. Our experience brings insight through high-quality analysis necessary to manage risks and take advantage of opportunities in the gaming and gambling industry.

### THE FTI CONSULTING DIFFERENCE



#### Practice expertise

Our experts have held senior leadership roles in both regulated and unregulated sectors and have advised on some of the industry's most significant issues.



#### Independence

With no audit practice, FTI Consulting is independent and uniquely positioned to provide impartial advice and assistance.



#### Industry specialists

Our experts have extensive industry experience and maintain a strong network in the gaming and gambling industries. We understand the key issues and commercial drivers and will work closely with key stakeholders to deliver the best outcomes for clients.

### OUR OFFERING

Our team is experienced in assessing regulatory, policy and business model changes in the industry. We provide a range of professional services to assist organisations to achieve their objectives and meet regulatory obligations.

FTI Consulting also has experts in Forensic and Litigation Consulting and Strategic Communications to provide our clients with a multi-disciplinary response to complex issues.



## CASE STUDIES



### Economic Impact of a Casino

Our team conducted an assessment of the economic impact of a casino operation to the South Australian economy. This involved an assessment of the market/s for gaming services, including demand across domestic and international markets and the competition within each market.

We also assessed the capacity of the business to compete for gaming clients in the wider Australian and Regional markets.



### Racing Club Economic Impact

Our team managed and directed a study to measure the economic contribution of a large-scale racing club based in Queensland. A compelling narrative was prepared to explain transparently and credibly the contribution of the clients' businesses, including racing, property and licensed clubs, as well as wagering revenue derived as a result of their activities.

The study also provided a scenario-based model of the broader economic impacts of planned investments within the clubs' property business over the next 10 years. The study was well received by the firm's CEO.



### QLD Market Analysis

Our team prepared a detailed analysis of machine gaming and gambling markets in Queensland (that is, its future growth prospects) and the likelihood of local patrons switching their gaming from clubs to the new casinos. This included market definition based on supply, demand and regional factors. Three sub-markets were defined, including Brisbane, Gold Coast and Cairns. An analysis of the financial impact on clubs was undertaken using a spatial model and player switching assumptions based on detailed interviews with a sample of clubs in the three regions.

The model predicted non-uniform impacts on the Club sector and identified clubs with the highest risk of closure as a result of proposed Integrated Resort Developments.

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- Cost-benefit analysis
- Market analysis

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