



Policy Forum & Workshop

Overview & Participants

On the 21st November 2023 ClubsNSW brought together 45 participants from across the NSW clubs gaming industry for the ClubsNSW Policy Forum and Workshop.

It provided an opportunity for the industry to collectively come together to explore external and best practice perspectives on the industry, explore the future and the experience of our key stakeholders.

Together, we developed a view of what we need to do to bring the future of a vibrant and sustainable industry to life. At the end we drafted a set of industry wide principles that will enable us to strategically advocate on behalf of the industry.



Adam Raskall
Alison Teehan
Amy Broomfield
Andrew Lancaster
Angus Pimmer
Belinda Jolley
Bill Greenwood
Bree Sanders
Chris Dimou
Dan Mitchell
Daniel Perkiss
Danny Munk
Darren Flynn
Darren Marino
Darryl Bozicevic

David Moorcroft
Deborah Atkins
Edward Camilleri
Frank Makryllos
Gerard Boyle
Glenn Kovacs
Grant Easterby
Grant Gladman
Greg Roberts
Guy Diven
James Sullivan
Jason Stone
Jinesh Patel
John Rafferty
Kade Morrell

Margot Smith
Olivia Simpson
Paul Cousins
Phil Kelly
Philip Gardner
Rebecca Riant
Rob Smith
Rob Wong
Rosie Vranic
Roy Bendall
Scott Bennetts
Simon Sawday
Tim Rowe

“We need to be aligned as an industry on both the terminology and outcomes we want. A single voice.”



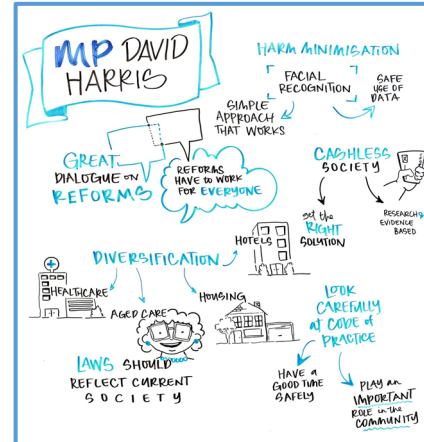
Setting the context



MP David Harris opened the session and spoke to his support of the Clubs and gaming industry.

He acknowledged that the environment in which we operate is very different to the past. Reform is coming and he is very encouraged to see the industry coming together in a way to truly shape the future.

He spoke to the want of government to work in partnership with the gaming industry on reforms that work for everyone.



Rebecca Riant formally opened the session and acknowledged the new collaborative approach to industry engagement and that there is more collaboration and listening required to ensure ClubsNSW are truly representing the industry.

Rebecca highlighted the fact that the day is about helping ClubsNSW ensure they can represent on behalf of the industry.



Dan Mitchell and Simon Sawday provided an overview of the day and that the intent of the day was to create a set of industry wide principles for gaming industry reform.

They acknowledged that the principles themselves would need to take into account the perspectives of key industry stakeholders.

They spoke to how this aligns with the approach Government takes to policy development. The outcomes of the day will form the basis of how we advocate to government.

The principles that we collectively develop need to help us get from where we are today to where we want to be.



Key messages:

- Clubs are a part of our communities
- ClubsNSW are here to represent the industry
- We have a very diverse industry
- We need to **represent the interests of all clubs**
- **There will be no one size fits all solution**
- Need a timeframe in which the industry can adapt
- The principles need to work agnostic of size and location
- Gaming is part of an important entertainment offering
- Gaming provides an important revenue stream which without many clubs would not be financially viable
- **For most people gaming is a source of fun and entertainment**
- Around 5% of gaming machine players reported experiencing problems with gaming
- It is important **the industry continues to innovate** to protect those at risk of experiencing gaming problems and identify those experiencing harm to connect them to the right resources
- **Today marks the start of a new journey**



Perspectives on a vibrant and sustainable industry



Sarah Adams

Chief Government & External Affairs Officer
Crown Resorts



Mitch Bowen

CEO Anaxi & CTxO Aristocrat



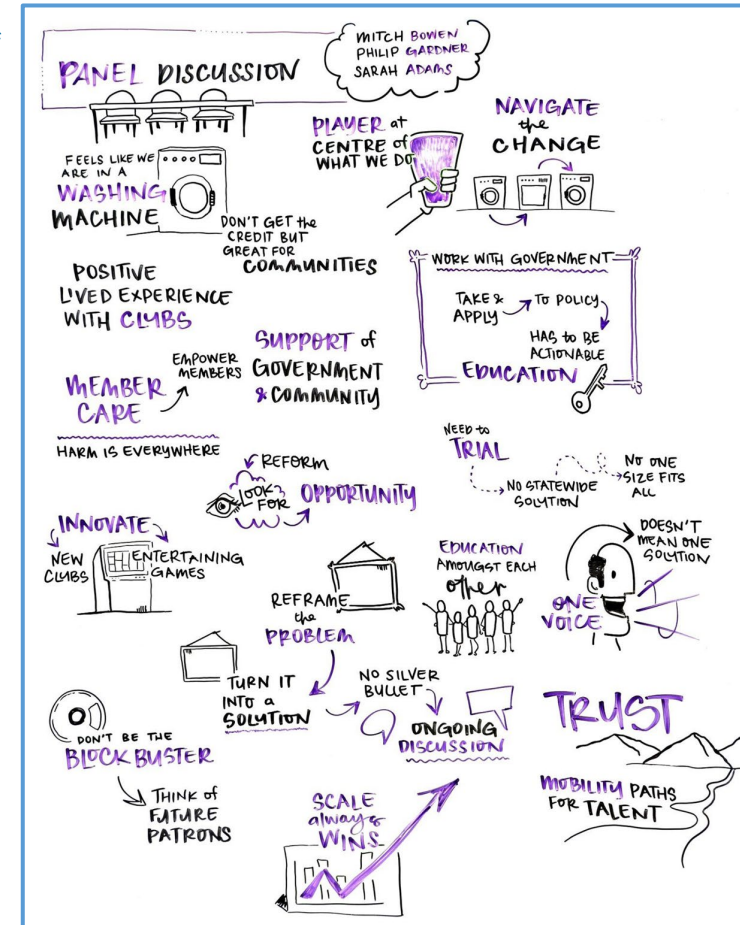
Phillip Gardner

CEO
The Wests Group Australia

We had the opportunity at the beginning of the day to hear perspectives from key industry players. We heard from a panel with representative views from government, gaming / gambling organisations, gaming technology suppliers and also the NSW clubs industry to start to paint a picture of what a vibrant and sustainable industry may look like for clubs in NSW.

Key insight / messages:

- We don't get any credit for the great work that we do
- We are in a difficult position as we are so diverse and have so many representative members. This gives us, however, a great opportunity as we can be very powerful when we work together
- In the future a sustainable industry is one that has access to capital, cash flow and a basis to move forward. To have this we need **certainty in regulation**
- We need **support from community and government**. Making a profit in our industry is not only needed but it should be applauded
- The conversation on harm needs to be reframed. It needs to be about **member care or empowerment**. **We need to be all about our members!**
- We need opportunities in Greenfield sites. This provides us an opportunity to continue to grow
- Let's make sure that reform gives a game that's more entertaining and our customers want to play
- We need to **embrace change and seize the opportunity**
- The analog world and digital world will come together. The future is about **delivering a unified experience**. This has to be **done responsibly**
- The **consumer / member has to be at the centre of everything** we do. You need to be able to deliver to your consumers
- Clubs still need to be at the **heart of their communities**
- We need to navigate the regulatory / policy change. **If you don't get it right, the regulatory impost is great**
- Our challenge is how we take a set of high level principles and translate this into a piece of policy. That's where the rubber hits the road
- We need to make sure we are continually **educating government, policy makers and regulators**. Regulators actually have no idea - they are worried about the wrong things. Education is not just important for government. It's important for us all
- **We do not want a state side solution!!** We need solutions that are relevant to size and capacity of clubs and their communities
- Change is going to be a journey. Pilots are a way for us to test approaches for long term change
- We need to be able to compete with online gaming and other competitors
- We need to be aligned as an industry on both terminology and outcomes we want. **A single voice**
- Look to where others have done reform well. **There is no silver bullet!!** It's an iterative process
- Make sure we **articulate the outcome - not the 'how'**. This gives us the flexibility to deliver solutions that are tailored to context



Enabling a vibrant and sustainable industry



Jamie Wiebe

Customer care and harm minimisation

We had an opportunity to hear from experts on specific topics to provide insights and perspectives on what we might do to create a vibrant and sustainable industry. Firstly, as a group we explored the topic of customer care and harm minimisation with **Jamie Wiebe**.

- We need to understand what gambling harm is. There are some things we as an industry can have control over. There are others we cannot
- We need to understand what we can do and what we cannot do
- The public feel better about gaming when they understand there are strong responsible gambling measures in place
- You definitely want to be able to direct the regulatory approaches
- Customer care can provide you with an amazing positive reputation



Jinesh Patel

Technology and gaming - an opportunity and enabler, not a silver bullet

Then, we had the opportunity to see two of three small group presentations. The insights and perspectives shared across these provided us the basis to start to explore what the future may look like....



Paul Newson

Creating greater regulatory certainty

Jinesh Patel spoke to the development and application of principles for gaming technology and how we progress sensible policy discussions.

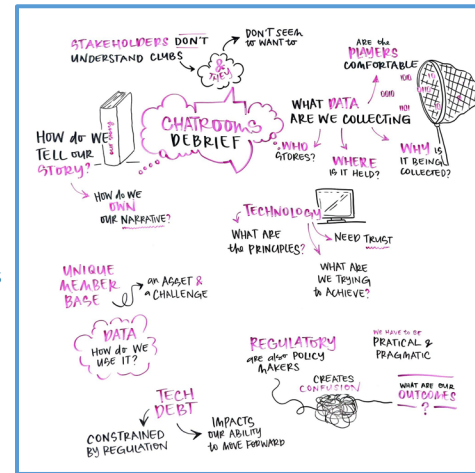
Paul Newson spoke about creating regulatory certainty...Is it illusory? How can we move towards greater regulatory certainty? What's in our tool kit and what may be some of the challenges we face?

Charlie Carter spoke on how you identify your audiences and how you create the stories you want to tell that resonate and how you do this all the way from an industry level through to an individual level.



Charlie Carter

Strategic influencing and defining your story



A vibrant and sustainable industry

Following the mornings opportunity to explore insights and perspectives we applied this knowledge. In small groups, we stepped into the future and exploredWhat would a vibrant and sustainable gaming industry look and feel like for clubs in NSW in 2033?

By designing the future state we were able to articulate the outcomes we want to see as an industry. We were also able to explore what we see as being of the greatest value and what we would prioritise.

Team 1	Team 2	Team 3	Team 4	Team 5	Team 6
<p>A VIBRANT AND SUSTAINABLE INDUSTRY FOR CLUBS (WHAT DOES GOOD LOOK LIKE?)</p> <ul style="list-style-type: none"> - STRONG MEMBERSHIP - Involved Community!!! - Proud history & Future. - Stability eg clear Regs - Innovation eg Self Exclusion Fund - Move with the times Entertainment 	<p>A VIBRANT AND SUSTAINABLE INDUSTRY FOR CLUBS (WHAT DOES GOOD LOOK LIKE?)</p> <ul style="list-style-type: none"> - Convenience for members, guests & staff - Quality - national model - Safe, friendly & clean environment - Trusted venues - brand loyalty - Broader membership - Modern + up to date + relevant 	<p>A VIBRANT AND SUSTAINABLE INDUSTRY FOR CLUBS (WHAT DOES GOOD LOOK LIKE?)</p> <ul style="list-style-type: none"> - People - - Growth (↑ club SW) - Stable regulation - Positive narrative / Reputation for gaming - Technology to support clubs / contribution - Member choice - Low risk play eg CSG - New venue /au /tourism 	<p>A VIBRANT AND SUSTAINABLE INDUSTRY FOR CLUBS (WHAT DOES GOOD LOOK LIKE?)</p> <ul style="list-style-type: none"> - Grow membership that value club - Gaming programs - The best selection of members are engaged by what clubs offer - Employment growth - stems in attractive employees - Highly bankable / financial strength a growth - Adapt technology - respectful - Valued by community - Cohesive relationships with all levels of government - regulates 	<p>A VIBRANT AND SUSTAINABLE INDUSTRY FOR CLUBS (WHAT DOES GOOD LOOK LIKE?)</p> <ul style="list-style-type: none"> - Gaming is a fun & accessible form of entertainment. - WE ARE PROFITABLE \$ - ASPIRE TO A GOAL ... ZERO 100% CUSTOMER CARE 	<p>A VIBRANT AND SUSTAINABLE INDUSTRY FOR CLUBS (WHAT DOES GOOD LOOK LIKE?)</p> <ul style="list-style-type: none"> - Trust of industry - Leaders - custom care - Employer of choice - Stakeholders - Constructive & interactive relationship with regulators
<p>WHAT DO WE PRIORITISE AND VALUE</p> <ul style="list-style-type: none"> - MEMBERS & STAFF - TALK WHOLE OF BUSINESS - PURPOSE - RELEVANT - CLEAR REGS - EMPOWERED MEMBERS - ENTERTAINING 	<p>WHAT DO WE PRIORITISE AND VALUE</p> <ul style="list-style-type: none"> - United industry - Understand customers - Understand risk - Evolving + diversifying - Trust + data security - Financial stability - Collaboration + communication - Community - Planning and education 	<p>WHAT DO WE PRIORITISE AND VALUE</p> <ul style="list-style-type: none"> - People - education, info, the narrative - Safer gambling / Customer Care - What can be done now medium / long term - Choice / options - Community / social hub 	<p>WHAT DO WE PRIORITISE AND VALUE</p> <ul style="list-style-type: none"> - Build Strong Relationship - Govt - Media - Community - GET GOOD AT TELLING OUR STORY - GAIN COMMUNITY TRUST - OBTAIN COMMUNITY SUPPORT - GOVT ENGAGED IN SOLUTIONS WE PUT FORWARD - USE OUR OWN SWEET SPOT FOR THE FUTURE - DE-STIGMATISE GAMING - ACCEPTABLE AS PART OF THE SOCIAL FABRIC 	<p>WHAT DO WE PRIORITISE AND VALUE</p> <ul style="list-style-type: none"> - WE OPEN TRUST AND RESPECT FROM ALL STAKEHOLDERS - WE PRIORITISE TECHNOLOGY - WE VALUE COLLABORATION. 	<p>WHAT DO WE PRIORITISE AND VALUE</p> <ul style="list-style-type: none"> - Engaged membership - Strong Community focus & investment - Articulate our story & all our stakeholders understand our story - Provide safe & secure place for guests

Themes

- Community focused
- Customer centricity and empowerment
- Trust and cohesive relationships
- Financial security and stability
- Generational longevity
- Collaboration and communication
- De-stigmatisation of gaming - proud of gaming as a revenue stream



The experience of our key stakeholders

Having defined what a vibrant and sustainable gaming industry for NSW clubs looked like, we stepped into the shoes of our stakeholders and explored their perspectives (what they valued, what they were concerned about) and identified opportunities to create a positive experience or outcome for everyone involved.

Customers

ENSURE A POSITIVE EXPERIENCE OR OUTCOME	MOMENTS THAT MATTER
<ul style="list-style-type: none"> Stigma & Guilt free gaming. Socially acceptable loyalty program Quality games & Tech Embedded Customer Care / RG Exceptional Customer Service (Culture change) ESG 	<ul style="list-style-type: none"> Privacy & safety. Staff interactions ↳ Player Welfare checks Celebrate wins Social Interactions Socially acceptable.

Customers (at risk of or gaming problem)

ENSURE A POSITIVE EXPERIENCE OR OUTCOME	MOMENTS THAT MATTER
<ul style="list-style-type: none"> CUSTOMERS KNOW THE CULTURE OF CARE IS PARAMOUNT CONFIDENTIALITY IS SACROSANCT FRUITLESS EXISTENCE STAFF ARE HIGHLY TRAINED IT'S EASY TO SEEK HELP + THEY FEEL COMFORTABLE RETURNING IT ALL FEELS EASY + NATURAL 	<ul style="list-style-type: none"> ESTABLISHED a CULTURE of CARE HAVING FULL CONTROL + FEELING SAFE Barriers to Support Non-existent TRUST IN INTERACTING WITH STAFF DESTIGMATIZING SILENCE + EXPERIENCE (eg. "Problem")

The community

ENSURE A POSITIVE EXPERIENCE OR OUTCOME	MOMENTS THAT MATTER
<ul style="list-style-type: none"> INVEST IN STAFF (TRAINING + RELATIONSHIP CULTURE) CLUBS TO COMMUNICATE EFFECTIVELY TO LOCAL COMMUNITY (SAFE PLAY, CLUBGRANTS INVESTMENT) COLLABORATE W/ STAKEHOLDERS SOLUTIONS FOCUSSED 	<ul style="list-style-type: none"> MORE STAFF INTERACTION TECHNOLOGY AS AN ENABLER (SAFE PLAY, PROMOTIONS) CONVENIENCE: PARKING, VALUE / CLEAN / SAFE FUN, LAUGHTER + ENJOYMENT (GRANTS, INVOLVING F&D, W/ STAFF)

Our employees

ENSURE A POSITIVE EXPERIENCE OR OUTCOME	MOMENTS THAT MATTER
<ul style="list-style-type: none"> Latest systems / best tech / latest games (F&D) Simple processes Broad offerings AI assistance Personal / professional growth Upskilling (staff) / educating (members) Employee value prop. (Flex, Autonomy, Benefits) 	<ul style="list-style-type: none"> show respect listen / thinked feeling part of a family / family support Feeling empowered (knowledge support) Feeling safe (job security, process) Feeling valued / appropriate remuneration (club awards) flexible work / life people interactions Celebrate the wins (stigma)

MP's and policy makers

ENSURE A POSITIVE EXPERIENCE OR OUTCOME	MOMENTS THAT MATTER
<ul style="list-style-type: none"> Clubs still community based Industry providing evidence-based advice → helping the MPs Gaming is non-issue → can continue to work w/ their club 	<ul style="list-style-type: none"> Impact of 24-hour news cycle → risks & opportunities Importance of in-person community engagement in digital world Positive industry engagement Natural disasters

Regulators

ENSURE A POSITIVE EXPERIENCE OR OUTCOME	MOMENTS THAT MATTER
<ul style="list-style-type: none"> Mutual respect Proactive innovation, communication + practices Communication - early / timely - open / honest 	<ul style="list-style-type: none"> Licensee Media query - well prepared / know the answer On Venue inspection - everyone knows + does + complies Industry provides solutions



What we need to do

To finish the day we focused on five areas that we believed would help us begin the journey towards a vibrant and sustainable industry.

In small groups we developed a point of view and shared these back with the broader group.

During this period we also focused on our primary objective: developing a draft set of industry wide principles.

These were tested with the group and received broad support..

THE PRINCIPLES
NEED TO OPERATE
ACROSS THE
WHOLE
INDUSTRY...



OUR PRINCIPLES

1. MEMBER WELLBEING IS **PARAMOUNT**
2. CLUBS ARE AT THE HEART OF THEIR **COMMUNITY**
3. CLUBS ARE **PROUD TO PROFIT FOR THEIR PURPOSE**
4. GAMBLING IS A **FUN, ENGAGING, & OFTEN SOCIAL FORM OF ENTERTAINMENT**

OPERATING PRINCIPLES

1. BUILD TRUST BY ACTING WITH **INTEGRITY**
2. ONE VOICE, CONSISTENT MESSAGE, MANY **STORIES**
3. WE CREATE A BETTER COMMUNITY FOR **FUTURE GENERATIONS**
4. WE ADVOCATE **CONSTRUCTIVELY** ON THE ISSUES THAT MATTER
5. WE PROVIDE GREAT **OPPORTUNITIES** FOR OUR PEOPLE
6. LEAVE **NO CLUB BEHIND**

Supporting our smaller clubs

<p>LEAVE NO CLUB BEHIND</p> <p>SCALEABLE SOLUTIONS</p> <p>AMALGAMATIONS MADE EASY (M.A.'S)</p> <p>IND REVIEWS AND SUPPORT. (OPTIONS)</p> <p>PROMOTE INDUSTRY ENGAGEMENT BY SM CLUBS</p>	<p>CREATE AWARENESS OF SMALL CLUBS BY ALL</p> <p>PROTECT SERVICE DISTRIBUTION ACROSS N.S.W.</p> <p>CI/OV ASSISTANCE (CROWN LAND ETC) (CASHLESS)</p> <p>FLEXIBLE LAND USE ZONING.</p>
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Our industry story

- ⊕ talk more about what we're doing to protect our people.
- ⊕ We're about more than gaming.
- ⊕ stories, not just stats.
- ⊕ educate staff, members & community groups on what we're about.
- ⊕ focus on core purpose
- ⊕ Proud of gaming.
- ⊕ Consultative approach to discussions with MPs, not combative.
- ⊕ net social benefit of gaming in clubs.
- ⊕ Revisit RG terminology/ ~~profit for purpose~~
- ⊕ Paint a picture of a world without clubs.
- ⊕ Leverage high levels of community trust in clubs.
- ⊕ ESG

How we organise ourselves

Key issues

- ⊗ Trust in Clubs NSW
- ⊗ Adequate consultation + industry ownership of policy positions
- ⊗ Who are the right advocates?
 - Clubs NSW
 - Clubs
 - Community
 - collaborate with Legals Clubs +
- ⊗ Measuring success
- ⊗ Centralised approach (Clubs NSW)
 - ↳ Whole of industry response
- ⊗ Retiring outdated approaches
 - ⊗ No valleys!
- * Communication methods

Consultation Process - Policy advocacy

- ① Notify clubs
 - Circulars
 - Targeted engagement
 - Regional committees
 - state councillors
 - Clubs in key seats, management
 - Talk to the right people
- ② Feedback window
 - Clearly defined
 - Better follow up when feedback isn't received
 - Webinars?
- ③ Communicate outcomes
 - Circulars
 - ClubLife

Our code of practice

- Review period
- Gaming incident register ⇒ Can it be located centrally?

 - detail to be included
 - same person
- Communication plan - state policy

 - how/when
 - same/differences
 - 3rd party exclusions
 - legal provisions
- AML → reporting to Police process
- Facial recognition → concerns (data/privacy)
- Player welfare club → incident register



ClubsNSW