



**GBG Zoom Meeting held on
Tuesday 8th June 2021 at 11.00 pm**

In attendance

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| Peter Hannibal (GBG) | Tony Boulton (Gauselmann) |
| Steve Sharp (GBG) | Sasha Blodau (Gauselmann) |
| Joanne Craig (Blueprint) | Howard Gant (IHL) |
| Gabino Stergides (Eurocoin) | Paul Monkman (Luxury Leisure) |
| Brian Hunt (Game Nation) | Nigel Davis (Merkur) |
| Stuart Green (Game Nation) | Elizabeth Speed (Novomatic) |
| Neil Finch (Game Nation) | Lee Morton (Scientific Games) |
| Paul Comer (Moto) | Ewen MacGregor (TLT) |
| Tracy Baitup (Roadchef) | Nick Jackson (Welcome Break) |
| Brian Jamson (Roadchef) | David Lucas |
| Luke Goss (Roadchef) | Graham Glanfield |
| Tim Stratton (Game Payment Technology) | |

		<u>ACTIONS</u>
1	<p><u>Introduction and Apologies</u></p> <p>SS welcomed everyone to the update meeting. Apologies were noted.</p> <p>SS advised that the main topic today is to present the GBG Strategy for the next few years. PH will take us through the slides.</p> <p>SS advised that we have lots of challenges and opportunities ahead and to take advantage of that GBG has to change.</p>	
2.	<p><u>Matters brought forward from the last meeting – 10th March 2021</u></p> <p>There were no matters from the last meeting</p>	
3.	<p><u>GBG Strategy</u></p> <p>PH shared the slides on screen.</p> <p>SS introduced the latest drafting of the GBG strategy for members on the call to input into and hopefully approve.</p> <p>SS explained that whatever we do at the GBG and for the industry, it has been as a result from members and we have had a very positive input from members into this strategy over the last few months. Members have been asking us for more and we recognise we need to respond accordingly and this strategy will show the way. Although the strategic aims we will be talking about today are leaning towards the land based</p>	

	<p>sectors, we would like to emphasise the point that we absolutely support every other sector in what they do.</p> <p>SS then referenced the GBG's Core Values which are published on the GBG website. These core values have been updated recently</p> <p>PH advised that the last point on the Core Value 'The Focus of GBG's efforts' will always be determined by its membership' takes us into the next slide where we have ended up with 8 Strategic Aims. As the Chairman has pointed out points 2-6 are leaning towards land based, but that is what our members have been asking us to focus on and we need to respect what the BGC are doing for online and would not want to duplicate - our policy is always to support the other trade bodies as appropriate.</p> <p>Here are the 8 Strategic Aims</p> <p><u>1. Build on the GBG's capabilities for leading technical Innovation Standards</u></p> <p>Technology holds the answers to much of our issues whether that is business intelligence, KYC, even problematic play. Technology is therefore important for the future for all of us. GBG is recognised for its achievements with industry protocols, guidelines, technical standards and we will build on this reputation. We have the right skills inherent in our membership and we should leverage that more widely.</p> <p>The first step is to co-ordinate a think-tank to identify areas we need to innovate, areas where we need guidelines and protocols and create relevant technical standards.</p> <p>Strategic Aim - Gives GBG members the ability to have a direct input into the direction the industry needs to take and also adds to the credentials of the GBG as an organisation.</p> <p><u>2. Protect the future of Land Based Gambling</u></p> <p>We know the high streets are struggling with online and out of town shopping centres. It became evident during the first lockdown in discussions with Westminster that they don't understand Licenced Gambling Premises and their nuances, particularly AGC's. Given the appropriate and right balance of focus the reputation of gambling on high streets could be and should be so much better.</p> <p>Suggested next step is the formulation of an 'advisory group' consisting of key stakeholders to identify all these credentials and positive attributes then use these characteristics to raise our standing and reputation.</p> <p>Strategic Aim - The aim will benefit the long-term viability of GBG members, all of whom have a stake or interest in land-based gambling.</p>	
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3. Remove the prohibition of debit card use with machine play

The case has been made in the DCMS's call for evidence for the 2005 Gambling Act. Change needs to enable all types of digital payments not just the removal of the debit card prohibition but any future payment method that comes along we need to include. Choices should not be restricted to gambling machines.

Neil Finch - We all want this and this is the future of cashless – do you think there is a likelihood of this being implemented within the next couple of years as there are two types of payment systems being developed, which were put on hold prior to lockdown so are a bit behind. But the systems are out there and being tested so do we wait for Government to change the legislation on payment systems or do we go ahead and get some of these systems onto our machines?

PH advised that the e-wallets that are out there can and should carry on. It is having the legislation changed now with the momentum that's there within the DCMS and the GC which is probably the easiest step. The harder step is engaging the banking industry and getting them on side, working with us. And we still have not squared the commercial problem about how we pay for the natural churn of cash with machine play, how we take money from one gaming machine onto another without having to pay transaction fees every time. PH advised we need to be doing everything until we know what the optimum solution is or, it may turn out to be a combination of different solutions.

PH advised that there is a role for the GBG to play in getting this change through into new legislation. We continue to work with the cross-industry groups. GBG needs to work on the technical standards.

Strategic Aim - This aim will benefit the long-term viability to GBG members businesses, all of whom have a stake or interest in land-based gambling and/or machines.

4. Secure the ability to provide linked jackpots in all Licensed Gambling Premises

This has been flagged with the DCMS's Call for Evidence. Only casinos can currently offer linked jackpots but there is no evidence of harm or problems. The consumer experience must continually improve. If they can be offered linked jackpots there is a role for GBG to play in getting this change through and creating the technical standards to allow different technologies to use the same jackpot system(s).

Strategic Aim - This aim is intended to improve the consumer experience in Licenced Gambling premises through innovation which should have a consequential benefit for all.

5. Produce anonymised statistical intelligence for land-based gambling activity

There are a number of intelligence gaps on gambling behaviours. Better intelligence will help corporate and business decision making and bust

many myths on how much people spend on gambling. The regulator is hungry for more data but we should take control in order to manage it and suggest we start with the GBG co-ordinating a 'think-tank' to identify the gaps'

Strategic Aim - The aim is about taking control of our own future and reputation, through improved business intelligence and by demonstrating social responsibility.

6. Standardise the monitoring and reporting of visits & dwell time in Licenced Gambling Premises

Our customer behaviour statistical data is currently incomplete. We have some intelligence on bingo, LBO's produced some statistics for the Covid questions about lockdown, but what we have is inconsistent. What we need to have is a database of information that enables us to talk to Westminster, authorities and even local authorities about what visit patterns are like. A suggested starting point is using a group of key stakeholders to identify what KPI's we want from customer visit pattern intelligence and then agree processes and reporting on what frequency we want to see this data coming through.

Strategic Aim – the aim will be the creation of more facts and genuine evidence about consumer behaviour that supports business decisions and supports future/new licence applications.

7. (Help to) Develop a more effective Gambling regulator for Great Britain

We should not underestimate our ability to influence such things. The DCMS are already listening. The senior team at the GC is in the process of being replaced. We already chair the Gambling Expert Group with BEIS and we need a regulator who is balanced and evidence led in their actions. The next stage is for us to engage with and try to positively influence the new GC team.

Strategic Aim - the benefit of this strategic aim to all members is fairly obvious. The overall benefit to gambling in the UK will be to protect the rights and freedoms of the vast majority of its gambling consumers and to improve reputations for all.

8. Make the Gambling Business Group more financially secure to deliver all of the above

GBG members are understandably asking for more from the GBG and for us to be able to deliver this ambitious strategy it needs to be secure and stable. The first step will be to change the status from an 'unincorporated association' onto a more formal footing and produce the business documentation that goes with it. Once we have agreed these strategic aims we will produce a long term plan that supports the relevant resourcing. If we can deliver this plan through developing the GBG it will also make being a GBG member even more compelling for new members, making us more influential, and it will also set the foundations beyond the current 3-year visibility.

	<p><u>Strategic Aim</u> - The benefit to members of this particular strategic aim is that the strategy gets delivered (along with the inherent benefits) and their membership and involvement in the GBG becomes more relevant to their own futures and to that of the industry</p> <p><u>Questions and Next Steps</u></p> <p>We viewed the draft strategy in the GBG Meeting in April and the revised version has been discussed at the meeting today for general approval and comment. The final strategy will then be taken back to a Member CEO’s meeting for ratification and support. Then we start the work on the individual aims, including the production of a detailed plan on each one setting out timelines and deliverables.</p> <p>Working/Steering/Advisory groups will be set up with clear terms of reference and members will be asked to support those groups relevant to them. The strategy will be reviewed on a frequent basis as part of the regular GBG Meeting agendas.</p> <p>SS advised that he and PH have been working on the financial structure and based this on delivering all the aims and the resources it might take.</p> <p>ES – as things can change frequently we will have to be prepared to develop the strategy or tweak the existing one.</p> <p>EMcG – about developing a new regulator – maybe change it to say ‘To help’ develop or contribute to the developing of’ because whilst we can influence it, we cannot do it on our own.</p> <p>PH asked members if anyone disagreed with anything in the strategy – no members disagreed. PH will now adopt this as the final draft and will take it forward to the CEO’s meeting to get it funded and resourced.</p> <p>AB asked if PH could circulate the slides to all GBG members as some could not be on the call today and ask for comments, just to ensure that we have all members on board. PH will circulate the slides.</p>	
6.	<p><u>Any Other Business</u></p> <p>DL – brought to the meetings attention a consultation that is out on ‘Protect Duty’ which is designed to put in place measures to keep the public safe from terrorist attack - from anywhere the public have access. The consultation ends on 2nd July and it will have an impact on every operator, so if you have any concerns about the extent to which you will be required to comply with it you might want to have a look at this. DL will send a one pager with the link that PH can send out.</p>	
7.	<p><u>Date of next meeting</u></p> <p>The date of the next meeting is <u>Wednesday 14th July 2021 at 11.00 am.</u> This date might change depending on the CEO’s meeting but we will keep members informed.</p>	