



KINETICA

CLIENT: Victorian Responsible Gambling Foundation
REPORT: Sporting Club Program Strategy Review
DATE: 12th January 2018

1. Executive Summary

1.1 Introduction

The Victorian Responsible Gambling Foundation (the Foundation) is an independent statutory authority established on 1 July 2012 that works to prevent and reduce harm from gambling. The Foundation's vision is for 'A Victoria free from gambling-related harm'. To that end, the Foundation is committed to delivering programs aimed at prevention, education, treatment and support. Within these programs, youth engagement initiatives have been identified as a key strategic focus. The Sporting Clubs Program (the program) forms part of the focus on youth.

The program, first titled Gambling's Not a Game, commenced in October 2013, and was developed in response to growing evidence of the normalisation of gambling and the increase in sports betting. The program remains unique – there are no other programs currently in place in Australia addressing the normalisation of sports betting.

The current iteration of the program, Love the Game, includes activity directed at all levels of sport with the aim of reducing the exposure of young people to sports betting advertising and helping sports clubs separate gambling from sports, to ultimately influence gambling attitudes and behaviours. Although in its infancy, the program has seen significant growth in its reach since its inception, with a total of 295 organisations across elite, amateur and local sports sectors signed up to the program. At the elite level, all 10 of the Victorian AFL clubs have signed up to program, a notable achievement, and there is increasing engagement with other codes such as cricket and football.

This is the second review of the program; the first was undertaken by the Foundation in 2015. As with any program it is important to review its performance. This is particularly important for the Sporting Clubs Program as its development to date has been relatively organic and experimental, reflecting in part that the Foundation is a relatively new organisation itself and the program is breaking new ground. Furthermore, the program operates in a rapidly changing gambling environment. This review provides an opportunity to take stock of the current gambling landscape, gain a deeper understanding of the needs and challenges of local and elite clubs, assess performance to date and identify areas for improvement.



1.2 Review Framework

1.2.1 Scope

The review is designed to identify the strengths and weakness of the current program and provide recommendations for changes to enhance its next phase. The questions the review sought to answer at the outset of the project are set out below.

Questions relating to the **program logic**:

- Do the current objectives and activities of the program align the two program areas and ensure cohesive program delivery? If not, how should they be modified to develop a clear program logic?
- Should the Foundation continue to focus on young men or should other audiences be a greater focus for the program, including who the Foundation partners with?

Questions relating to **the Charter**:

- Does the Charter need to be strengthened to align with community attitudes (i.e. exclude clubs that own or operate EGM venues or receive sponsorship funding from hotels or clubs that operate EGMs)?
- What would be the consequences and advantages of strengthening the Charter in relation to program delivery and stakeholder and community buy-in?
- Acknowledging the dynamic gambling environment, how can the Charter be modified to be adaptable to new gambling products and changing gambling policies and regulations?
- Are there any other additions or clarifications that need to be made to the Charter that would strengthen the program and better articulate its intent?
- Should the Charter have different accountabilities for elite and local sporting clubs?

Questions relating to **the delivery model**:

- At a local level, does the current delivery model provide for an effective and fit for purpose approach that aligns with public health principals?
- If not, what would be an alternative model based on best practice, including consideration of the following:
 - Establishing different levels of involvement in the program for clubs
 - Providing incentives for local sporting clubs to be involved in the program
 - Delivery via alternative platforms or partnership arrangements:
 - If so, how could agencies and partners be better supported to deliver the program?
- Does the Foundation have the right mix of requirements and supports for participating clubs that embeds healthy and safe sporting club environments (i.e. Charter requirements including the hosting of an information session, themed rounds and the nomination of Charter Champions) but does not over burden volunteer run clubs?



- Could the format and delivery of the players' information session and the themed rounds be improved? If so, what modifications could be made?
- What else could be done to leverage the partnerships that the Foundation has with elite partners?

1.2.2 Approach

To underpin the review, it was critical to develop a robust fact base and consult with a broad range of internal and external stakeholders. The review employed a mix of secondary data and primary research to capture the required information. These inputs are summarised below.

1.2.2.1 Secondary data

Program information

The Foundation supplied a range of background documents specific to the program including:

- the existing program logic detailing the inputs and the short, medium and long-term outcomes
- a database of clubs signed to the charter
- an overview of resources used to deliver the program
- program content and collateral.

Desk research

Desk research was conducted to provide important contextual information on the gambling environment and the relationships between gambling and sports. Case studies of health promotion in a sporting context were also developed.

Literature review

A body of literature on health promotion within sport has been reviewed to identify drivers of best practice.

Primary research

A large body of primary research was conducted as part of the review including:

- workshops with Foundation and Gambler's Help staff
- a forum with health promotion and sports sector organisations
- in-depth interviews with internal and external stakeholders
- surveys with local sports club presidents and players
- a survey with members of elite sports clubs (undertaken by Nielsen)
- a community attitudes survey (undertaken by ORIMA)
- observation of local club Information sessions.

A detailed breakdown of the methods used to collect primary research data is provided in the appendices.



1.3 Key Findings

Sports betting is the growth area of the gambling industry. The amount spent by Victorians on sports betting trebled between 2009 and 2014. This growth is fuelled by aggressive marketing and product innovation. Marketing is primarily aimed at young men but also reaches and influences children – 66 per cent of Victorian children aged eight to 16 can name at least one sports betting brand.

Despite the continued aggressive marketing activity of sports betting brands, the program operates in an environment that is arguably becoming more conducive to success. Community concern about sports betting is high and increasing, whilst new legislation by federal and state governments is designed to restrict sports betting advertising.

The program is recognised and valued for the important role it plays in interrupting and providing balance to sports betting advertising by all groups consulted, including existing program partners and other organisations operating in the sports and health promotion sectors.

Although the program is still relatively new it has achieved significant success:

- 295 sports organisations, including all Victorian AFL teams, are currently signed to the Charter.
- Elite sporting partnerships deliver significant cost-effective reach and provide a balance to sports betting advertising.
- Evidence (drawn from players and presidents who have participated in information sessions and the themed round) indicates that program delivery at the local level is well received.

Stakeholders consulted through the evaluation identified a wide range of opportunities to build on the achievements made by the program to date. The key areas that emerged are:

- greater clarity and focus of strategy
- targeting young people (girls and boys)
- tightening the scope and use of the Charter
- stronger understanding of local club environments and their resource challenges
- increasing the efficiency of program delivery at the local level
- identifying and leveraging partners to deliver the program
- orientating the program to deliver greater impact.

We recognise that the program is still in its infancy and it will take long-term action to generate significant impacts on sports betting attitudes and behaviour. However, given the program is now four years old, the time is right to explore a refreshed approach. Community concern about sports betting is significant and increasing, the legislative framework on sports betting has changed and the review has clearly identified opportunities to further enhance the program.



1.4 Guiding Principles The recommendations put forward are shaped by the principles shown below. These principles, based on learnings through the review and best practice, are designed to provide a basis upon which the program can be optimised and as a reference point to ensure the Foundation remains on strategy.

1. Whilst the program's focus and delivery model should connect back to the Foundation's broader aims, it should not be expected to deliver against all the strategic priorities of the organisation.
2. The program should have a **specific focus** with defined expectations and avoid generalities. For example, it should focus on a particular gambling issue within a distinct audience and clearly state the expected changes to be delivered.
3. A **clear rationale and narrative** is required for both internal and external stakeholders to unequivocally understand the focus of the program, and its aims and limitations.
4. Time-based objectives that are **achievable and accepted** by internal and external stakeholders should be clearly defined.
5. The program should be cognisant of the needs and challenges of its target audience and should ensure that the program has engagement, uptake and ultimately impact.
6. The strategy and delivery model should provide a **sustainable** platform by using existing resources (financial, physical, organisational and human) more efficiently. Program design should aim to **create a balance** in terms of reach and impact. This should be reflected in the program logic and the specific activities delivered through the program.
7. The refreshed program should look to **leverage the IP and knowledge of the Foundation** via partnerships to drive reach and impact of the program. This could be achieved through developing a range of program delivery partners and by sharing or integrating responsible gambling messaging into other organisations' health and welfare programs.
8. We recommend moving the positioning and mentality of the program from **one of 'blocking' to a strategy of 'interrupting' and providing balance to the weight of sports betting promotion**. This important distinction has a range of benefits:
 - This approach reflects reality. Within the AFL, for example, the Foundation is unable to block sports betting advertising as there are significant sports betting brand partnerships with the code and broadcasters.
 - It more clearly aligns with program strategy, which is to invest in clubs to interrupt gambling brand advertising
 - The Foundation can make investment decisions based on strategic alignment and requirements
9. The new program requires strong, consistent and long-term **commitment** from the Foundation board, CEO and senior leadership team.



1.5 Recommendations

1.5.1 Strategy and program logic

1. Focus programmatic elements on sports betting

Programmatic elements should focus upon the ‘problem’ of sports betting. Specifically, the normalisation of sports betting resulting from the saturation of sports betting brand advertising. The rationale for this recommendation is as follows:

- Sports betting is the primary advertised gambling product.
- Sports betting is the growth sector of gambling.
- Community sentiment supports action on sports betting promotion.
- It aligns with government legislation restricting sports betting advertising.

2. Address the reliance on electronic gaming machine (EGM) revenue through influence and advocacy

The Foundation should leverage the investments made in partnerships through the program to influence and support the organisations to reduce their reliance on EGM revenue or exit from owning and operating EGMs within an agreed period. If this commitment cannot be made, then a partnership should not be agreed or extended. Examples of this approach include:

- Make larger scale partnership investments with organisations that do not receive direct revenue from EGM venues.
- Promote examples of organisations and clubs that exit or reduce their revenue from EGMs.
- Provide advice and support to the AFL and AFL clubs on reducing their reliance on revenue from EGMs. There is already progression here, with the Foundation funding a project to explore how local sports clubs could divest from EGM revenue and invest in alternate revenue streams to achieve sustainable change.

3. Target children and young people via their influencers

We recommend targeting the following primary and secondary audiences through the program.

Primary audience: girls and boys aged under 18 who are sports fans and players

- Half of Victoria’s adolescents have high exposure to sports betting marketing.
- Two-thirds of all children aged between eight and 16 can name at least one sports betting brand.
- One in five adults who experience severe gambling harm started betting before they turned 18.
- Targeting young people aligns with community sentiment to protect children from gambling advertising exposure.
- Targeting this audience aligns with the primary prevention focus of the program.

Secondary audience: Men aged 18-30 who are sports fans and players

- Ninety per cent of people who bet on sports are male,



- Communications by sports betting brands is aimed at young men.
- Provides an opportunity to include secondary prevention strategies within the program.

Influencers such as parents, local club presidents and volunteers, and elite sports stars should play a key role in reaching and engaging the target audiences, particularly the under-18 segment. We recommend a ***strong focus on parents as main influencers of the under-18 primary target audience***. The Foundation should consider the development and piloting of specific awareness-raising activity targeted at parents within sporting clubs.

4. Two-tiered program structure

We recommend reformulating the structure of the program to deliver a better balance between reach and impact, engaging the proposed target audiences whilst reducing the burden on the Foundation's resources. We propose to restructure the program into two tiers as shown below. We have provided thoughts on the elements that could be included in each tier, the final specification of each tier would be developed by the Foundation.

Whole of sport tier

This would be the main element of the program, delivered to and through all levels of sport and focused on primary prevention. It would incorporate many of the current program's aspects and integrate elite and local channels under the one initiative. We would not anticipate Gamblers Help having a role here. This tier would include:

- recruitment of both elite and local clubs
- partnerships with elite clubs to interrupt sports betting brand exposure and communicate program messages to fans and local clubs
- themed rounds at amateur and local levels facilitated by state sports organisations
- a number of Love the Game conferences held each year pre- or post- the themed round replacing the existing information sessions. The conferences:
 - would be aimed at key influencers within sports clubs such as club presidents, volunteers and Love the Game champions
 - could be held in a range of locations across Victoria
 - might include elite content/IP ambassadors to encourage attendance (possibly integrate gambling prevention content as part of a broader Love the Game experience)
 - provide the potential for partnerships with other health promotion and sports organisations.

Local clubs intensive tier

- A highly-targeted initiative aimed at specific clubs or associations where there is an identified high-risk sports betting culture. Elements would include: targeting high-risk Local Government Areas (LGAs), for example lower Socio-Economic Indexes for Areas (SEIFA) LGA's where gambling losses are significantly higher than average



- use of incentives (e.g. grants and elite sport experiences to encourage and reward engagement)
- presidents to nominate their clubs for the program through state sports organisations and other program partners
- selection of 10 to 15 clubs by the Foundation for the program based upon review of applications and criteria
- an intensive program of support and education across the club, including staff, players and members, that contains elements such as:
 - longer-term engagement (e.g. three months)
 - workshops
 - Gambler's Help access
 - leveraging of elite club assets through content and incentives to drive engagement.
- where required, this program could provide a pathway into Gamblers Help services

Given the proposed changes to strategy, a refreshed program logic will be required (a preliminary proposal is provided in the appendices). The proposed logic aims to be more defined and less complex than the current version, enabling the Foundation to focus on a select set of realistic program outcomes. The draft logic provides a basis upon which the Foundation will create a version to take through to implementation.

1.5.2 The Charter

The Charter

5. Replace the Charter content with a reduced more targeted set of requirements.

The Charter needs to have a clear purpose at the local and elite level. In its current format, as a program device it does not drive desired changes, and it creates an administrative burden for the Foundation due to monitoring of compliance.

We recommend replacing the Charter content with simpler elements that more clearly align with the Foundation's aims. These elements should be expressed in plainer terms to allow for easier measurement with fewer grey areas. The recommended elements within a redesigned Charter, and to be agreed to by participating clubs, are:

- a. refusing sponsorship revenue from gambling operators
- b. if operating EGMs, commitment to developing a plan to reduce the clubs' reliance from EGM revenue or exit from owning and operating EGMs within an agreed period.
- c. where possible, use their sphere of influence to seek change that interrupts the normalisation of gambling in sport
- d. refusing sponsorship or other revenue from new gambling products
- e. developing a localised gambling policy that seeks to reduce and prevent gambling harm
- f. where possible, annually participate in themed rounds and gambling information sessions and conferences

For the Charter to provide influence and impact at the local level the Charter must be cognisant of club individual needs and characteristics. The Charter should include the fundamental non-negotiable charter



elements whilst offering some flexibility around how clubs develop and implement their local policy. This allows communities to take ownership, implement needs-led policies, and supports the program's sustainability. The Foundation should look to actively work with clubs to grow and strengthen their policies. This could be achieved through conferences which demonstrate best practice and provide the opportunities for local clubs to share success factors, in addition to the distribution of policy templates, support and guidance from the Foundation when and if required.

If an elite or local club cannot commit to the elements within the redesigned Charter, they would be unable to participate in the program. The Foundation should reframe the Charter as the 'Love the Game Charter', to alleviate complications associated with the current 'Responsible Gambling Charter'.

1.5.3 Delivery model

6. Transition the majority of program delivery to a partnership model

The Foundation should consider the use of partnerships to deliver activity focused at local clubs. This would mean that most of the program would be delivered via partnerships. The rationale for this recommendation is as follows:

- Delivery partnerships allow the Foundation to focus on the strategic elements of the program.
- Partners' existing relationships and channels can engage local sports clubs more efficiently and effectively.
- Where partnerships have been employed through the program they have been relatively successful.
- Aligns the delivery of both the local and elite sports club programs under a partnerships model.

7. Stronger alignment of elite and local

Delivering most of the program through partnerships would enable stronger alignment of elite and local. Examples of integration opportunities include:

- using content and IP from both the elite and local clubs in campaign and program materials
- employing elite sport partnership assets to incentivise local clubs to engage with the program
- engaging ambassadors from all levels of sport (elite, amateur and local) in campaign and program promotion, messaging and delivery
- Encourage collaboration with local and elite clubs in the same region

8. Reformulate the elite clubs' partnership portfolio

The current partnership agreements with elite clubs run until the end of 2018. This provides an opportunity for the Foundation to increase the diversity of partners and the type of assets it invests in.

The current partnership portfolio is dominated by male sports teams. The recommended change to the primary target audience of the program to include girls and young women provides the opportunity to diversify the portfolio to include more female sports properties, as well as diversifying within current agreements, for example, AFL Women's (AFLW)



Most of the partnerships currently sit with the commercial teams of each club. There are, however, sports team assets that could provide more in-depth community engagement to complement the reach delivered by the media assets that currently dominate the portfolio. A few examples that could be explored are:

- Next Generation academies for AFL clubs
- player welfare programs (AFLPA delivered activities)
- Melbourne Stars Club (a grassroots cricket club affiliation program).

The Foundation should look to conduct an audit of the market to map the available partnership opportunities and assess their fit with program strategy. This will underpin any investment decisions and means that proactive discussions with sports organisations can take place in advance of the current portfolio expiration date.

1.5.4 Program administration

9. Adopt more effective administration practices

To support the effectiveness of the program we recommend the following:

- Moving to a three-year planning cycle to enable the Foundation to take a more strategic and longer-term view of the program. This will be particularly beneficial for a delivery model built on partnerships, which typically require a longer-term focus to extract the most value.
- Ongoing measurement and evaluation of the program to track performance and inform decisions on investments and activity. This could include an evaluation conducted six to 12 months into the launch of the refreshed program to assess whether implementation is aligned with the desired outcomes.
- Gathering data from partners in addition to the Foundation's own outcome measurements. This will allow for the creation of KPIs for both the Foundation and its partners, enabling performance monitoring and greater accountability. The specific data required from partners would be defined by the desired outputs and outcomes included in the refreshed program logic.
- Ongoing stakeholder engagement should be prioritised. Nurturing relationships with relevant government departments and authorities, sports organisations and other organisations operating in health promotion or sporting contexts is likely to create partnerships to leverage and distribute the Foundation's messages. A dedicated stakeholder engagement plan should be created.

