

CMAA National Managers Conference Liverpool Catholic Club



Thursday 29th June 2023

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Wohlsen Consulting



- Law & Economics, University of Qld, BP Oil, KPMG Consulting, own practice or partnerships incl DWS
- 30 years in clubs

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- Bachelor of Business QUT, MBA AGSM UNSW. Unilever, Arnott's, Pfizer, Johnson and Johnson, Bayer, GSK, own practice
- 30+ years corporate, 2 years in clubs

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CMAA and Wohlsen Consulting Partnership

Wohlsen Consulting appointed CMAA exclusive research partner

Extensive national research and insights plan for the clubs' sector

1.
*Gaming
Performance
and Trends*

2.
*Financial
Benchmarking*

3.
*Remuneration
Survey*

4.
*Member
Visitation
Survey*

5.
*Departmental
and Operations
Metrics*



Agenda

- ❖ *Gaming Trends*
- ❖ *National Revenue Pulse Survey and Gaming Outlook*
- ❖ *Economic Indicators*
- ❖ *CMAA Cashless Card Industry Paper*
- ❖ *National Club Visitation Survey and Introduction to new Artificial Intelligence Solution*

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Win a free member survey worth \$3,500 today

Register Interest

Or write your name, your club, email and mobile number on the entry form provided.

We will send you a member survey information pack. No obligation



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NSW Gaming

*Record trading in 2022!
How will 2023 play out?*

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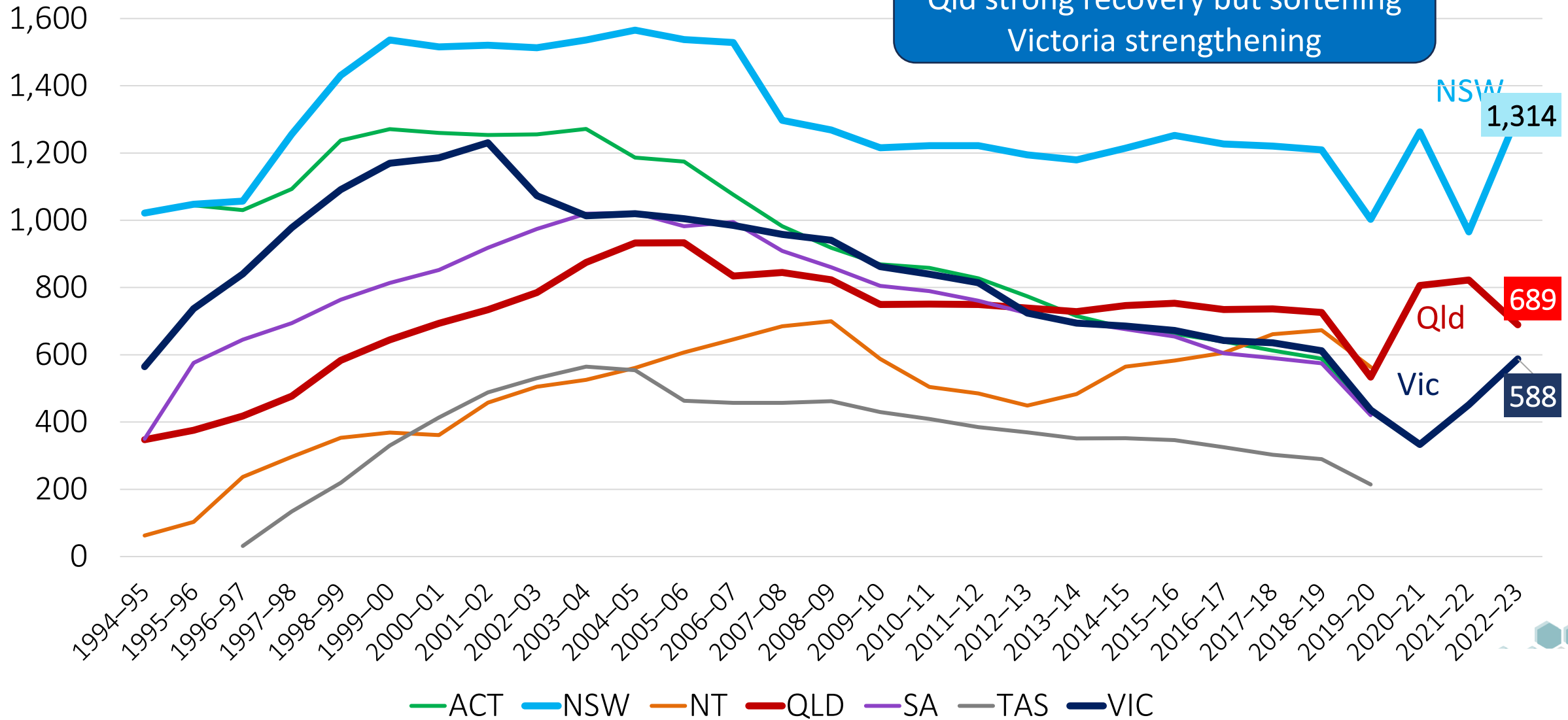
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Latest per capita expenditure analysis

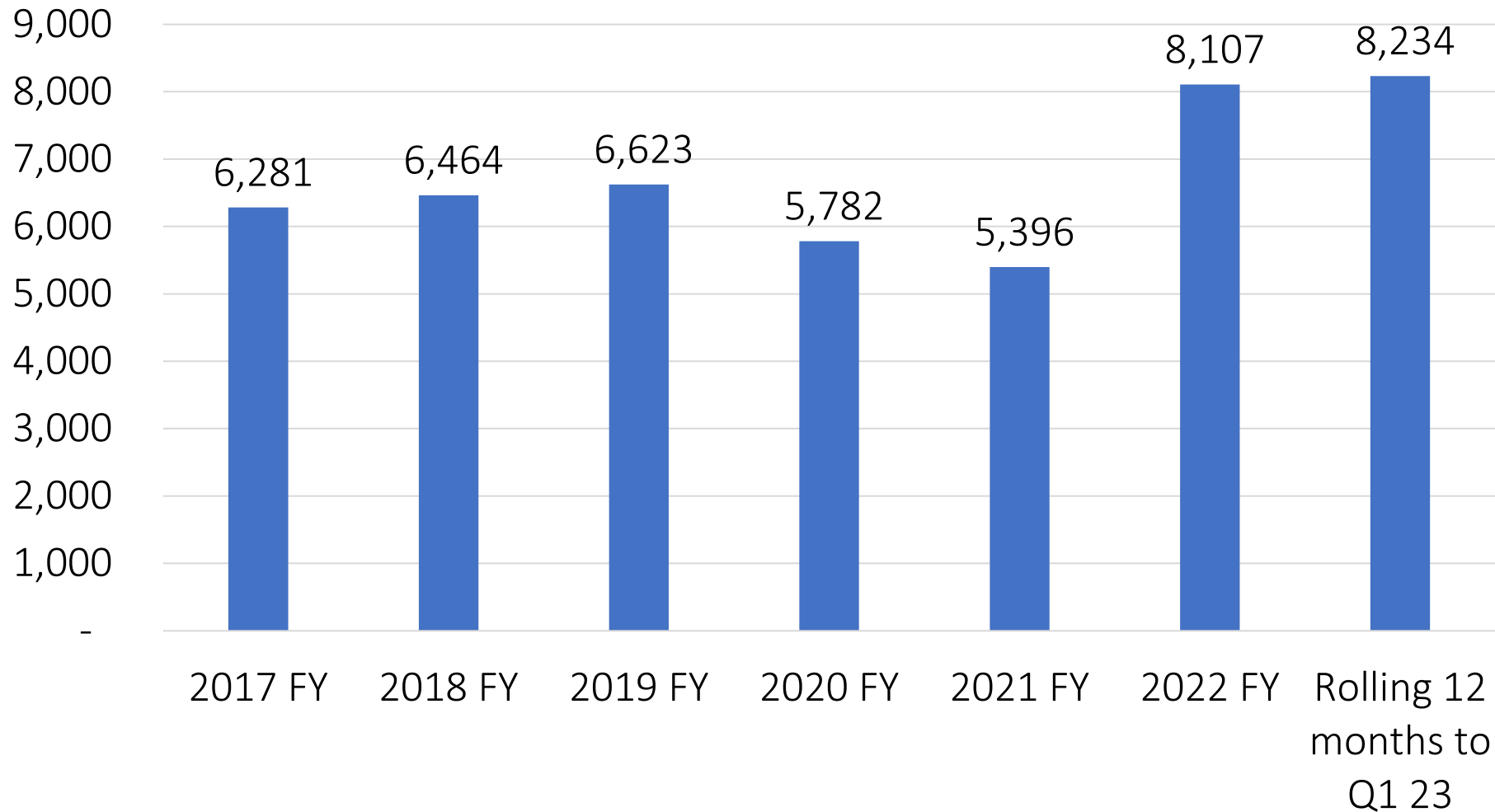
\$ Spend per annum per adult

NSW strong recovery
Qld strong recovery but softening
Victoria strengthening



Total NSW Clubs & Hotels Gaming Net Profit

Full Years 2017 to 2022 \$M



NSW Market is now \$8.23 Bn

+22% vs 2019 (Pre COVID)

14% (adj. for inflation and population)

+\$1.5Bn vs 2019

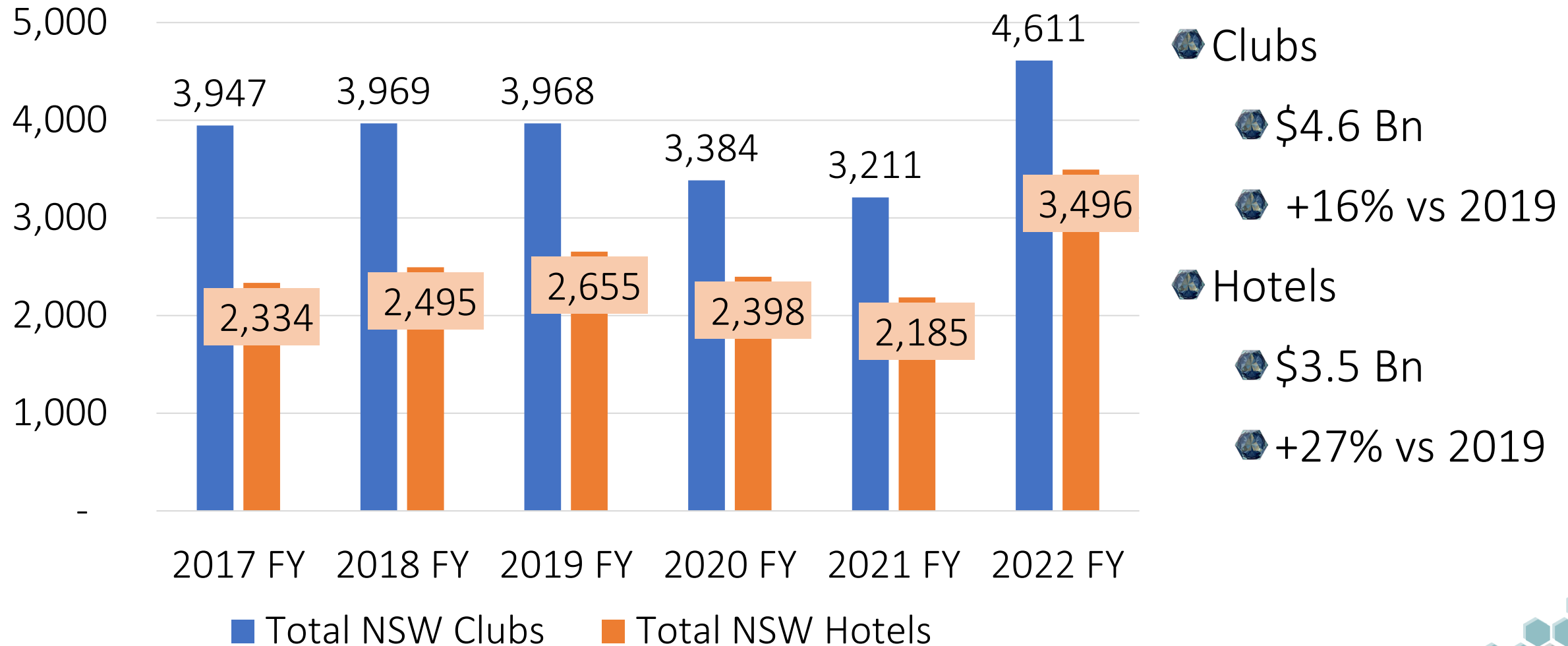
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Total NSW Clubs vs Hotels Gaming Net Profit

Full Years 2017 to 2022 \$M

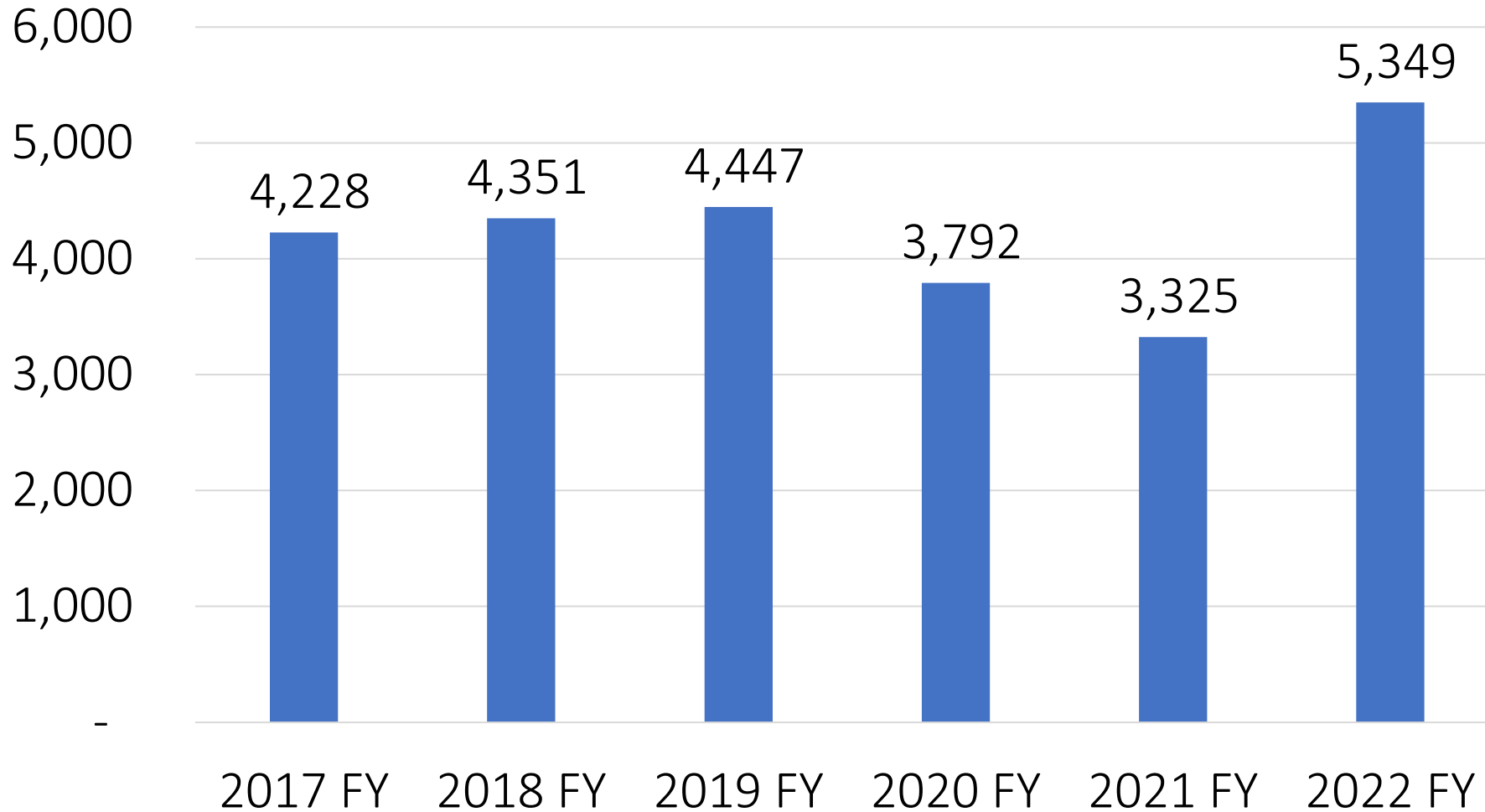


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Sydney Clubs & Hotels Gaming Net Profit

Full Years 2017 to 2022 \$M



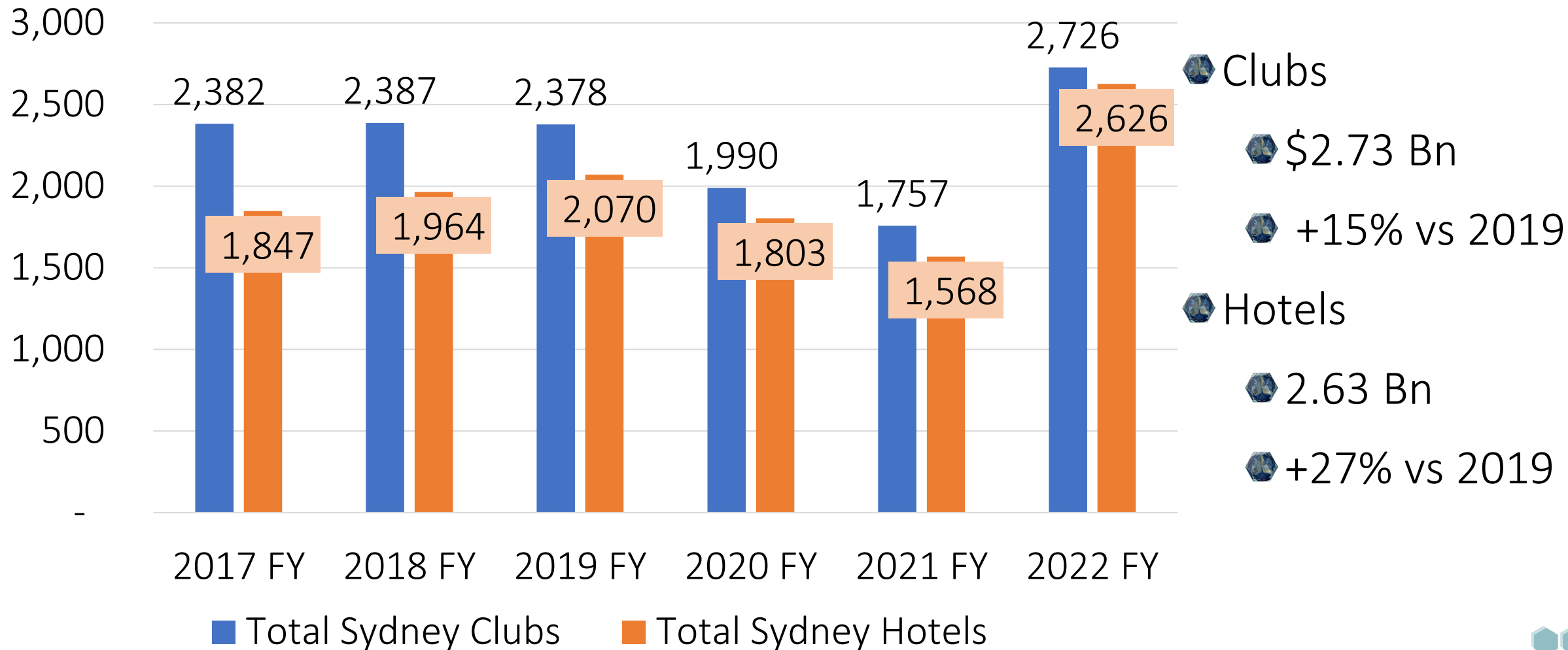
- Sydney market is now \$5.35 Bn
- +\$1.0Bn vs 2019
- +20% vs 2019
- 12% real growth (adj. for inflation and population)

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Sydney Clubs vs Hotels Gaming Net Profit

Full Years 2017 to 2021 \$M

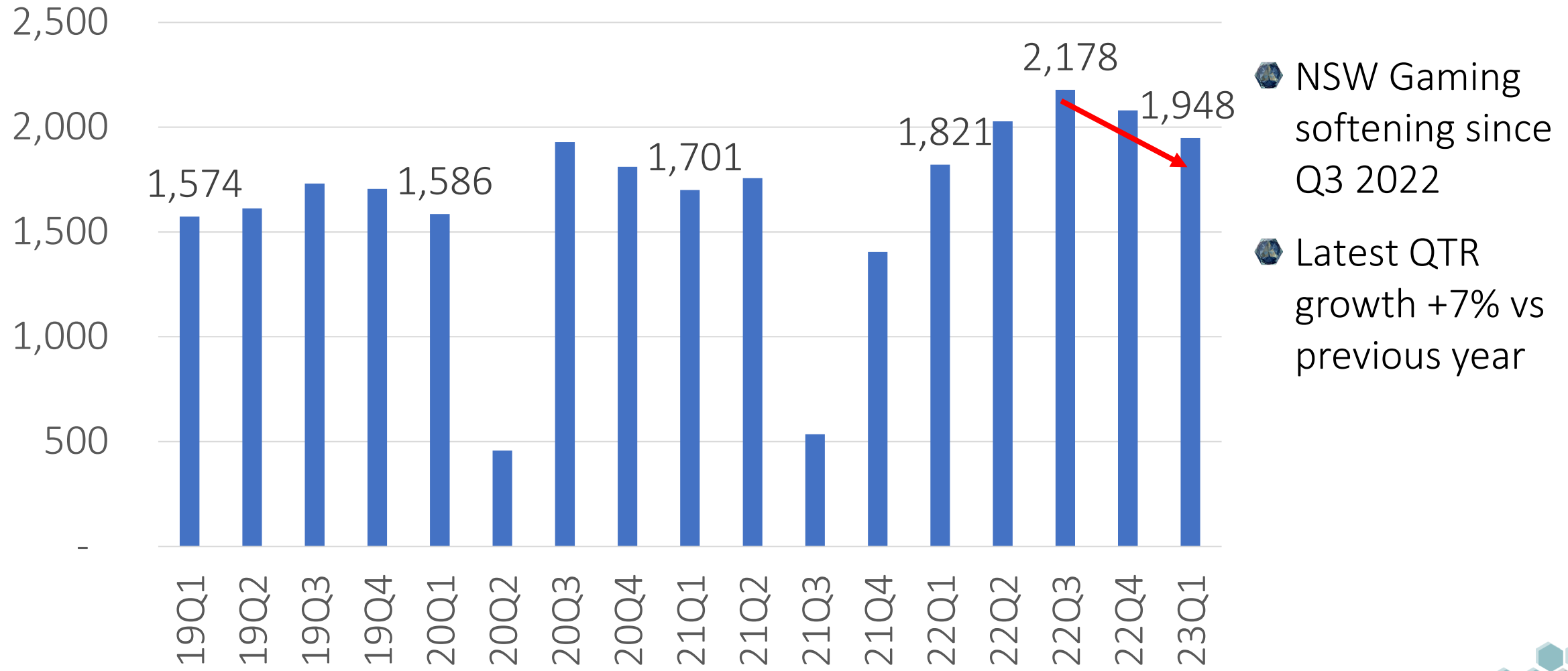


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NSW Clubs & Hotels Quarterly Gaming Net Profit

Financial Year 2019 to Q1 2023 (to end March 2023)

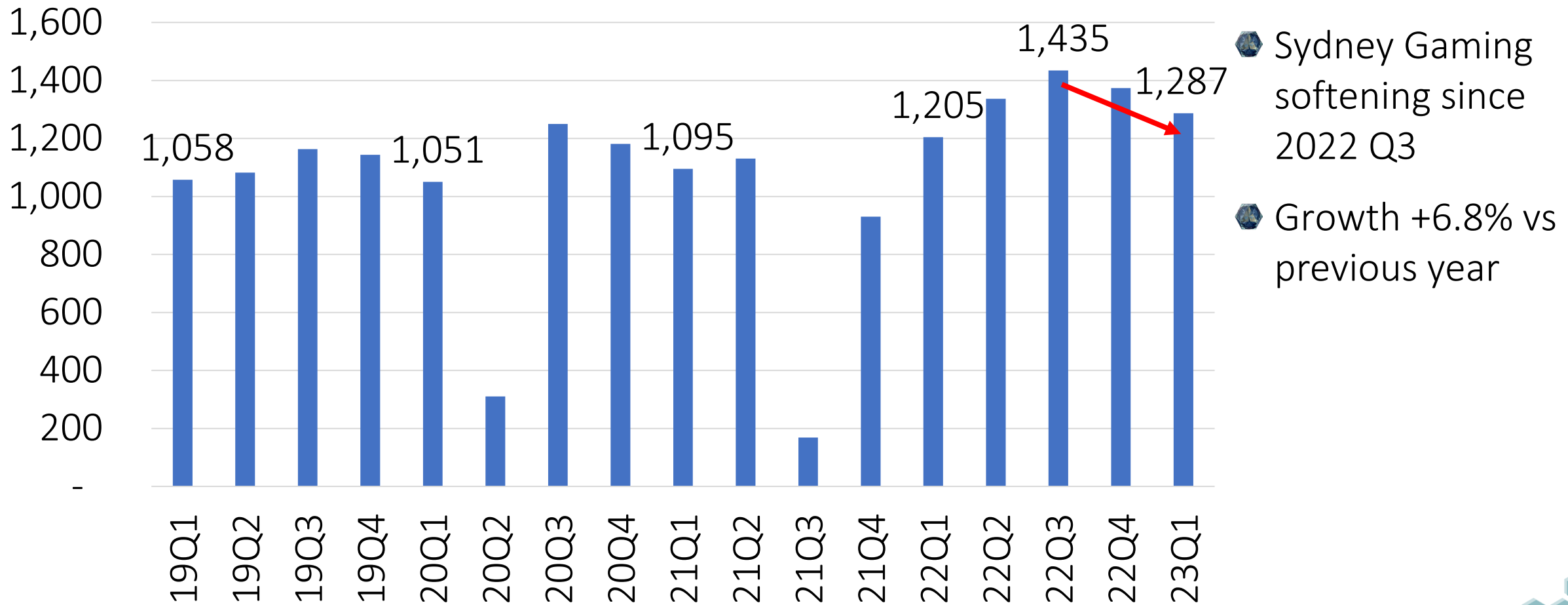


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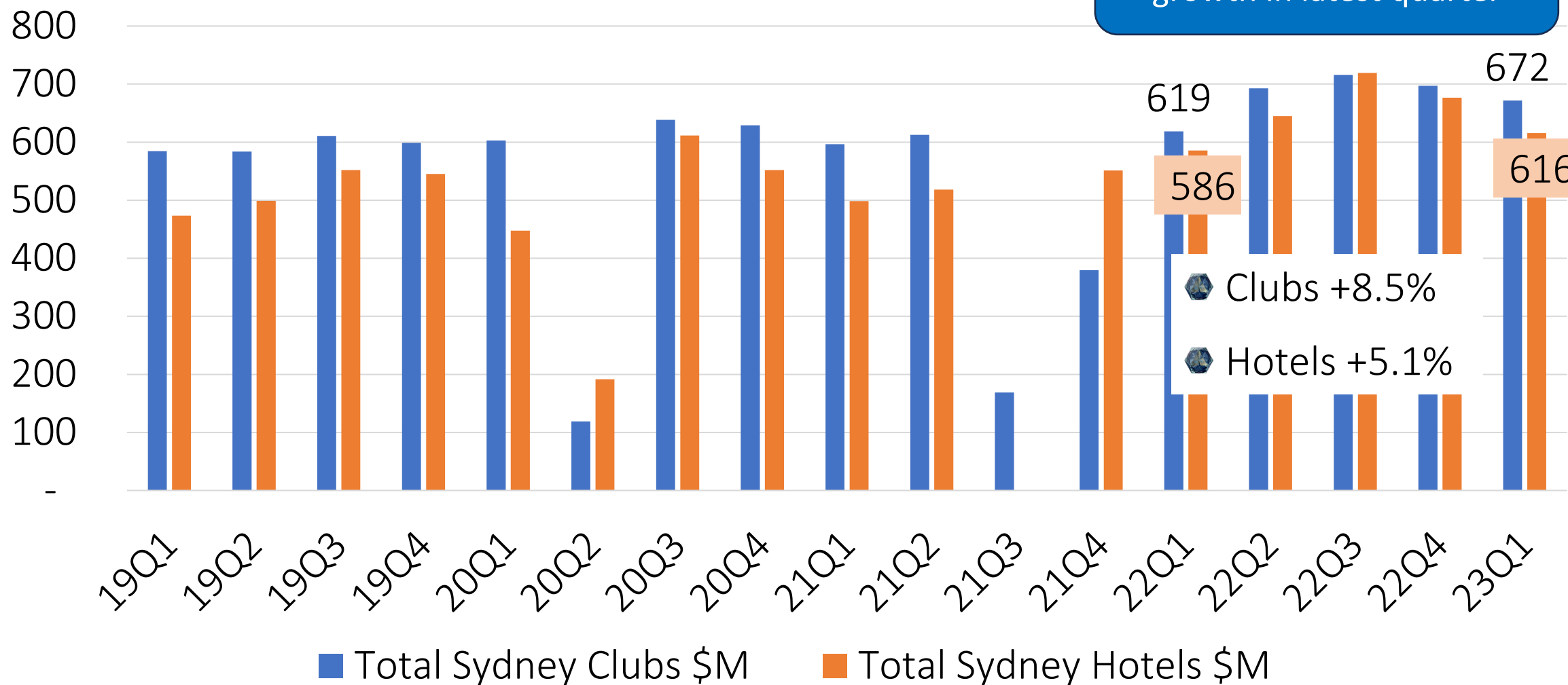
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Sydney Clubs vs Hotels Quarterly Gaming Net Profit

Financial Year 2019 to Q1 2023 (to end March 2023)

Clubs showed stronger growth in latest quarter



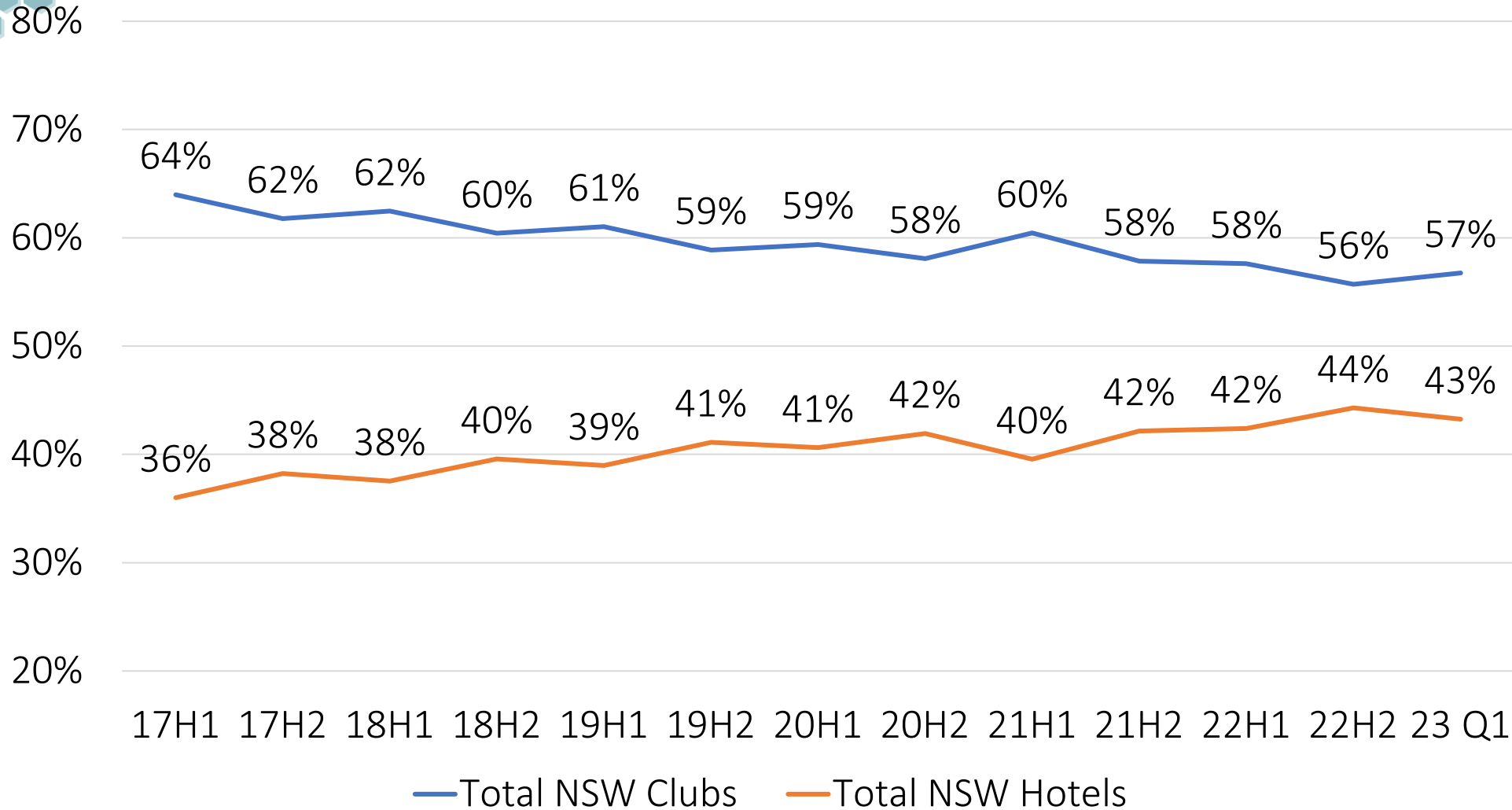
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Market Share Total NSW Clubs Vs Hotels

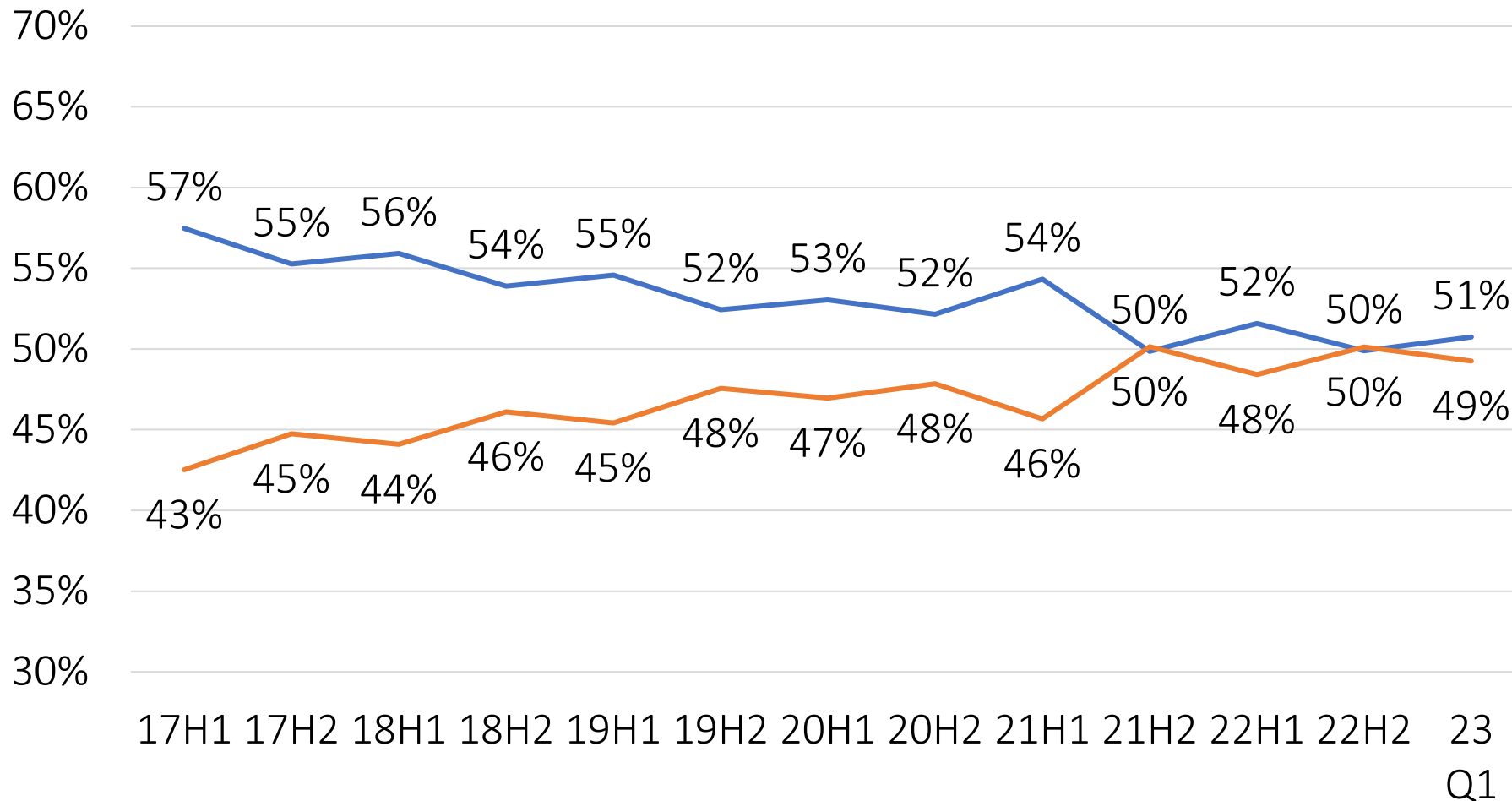


- Long term trend of hotels gaining share
- Q1 2023 saw clubs reverse share decline
- 7 share points since 2017

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Market Share Sydney Clubs vs Hotels



— Total Sydney Clubs

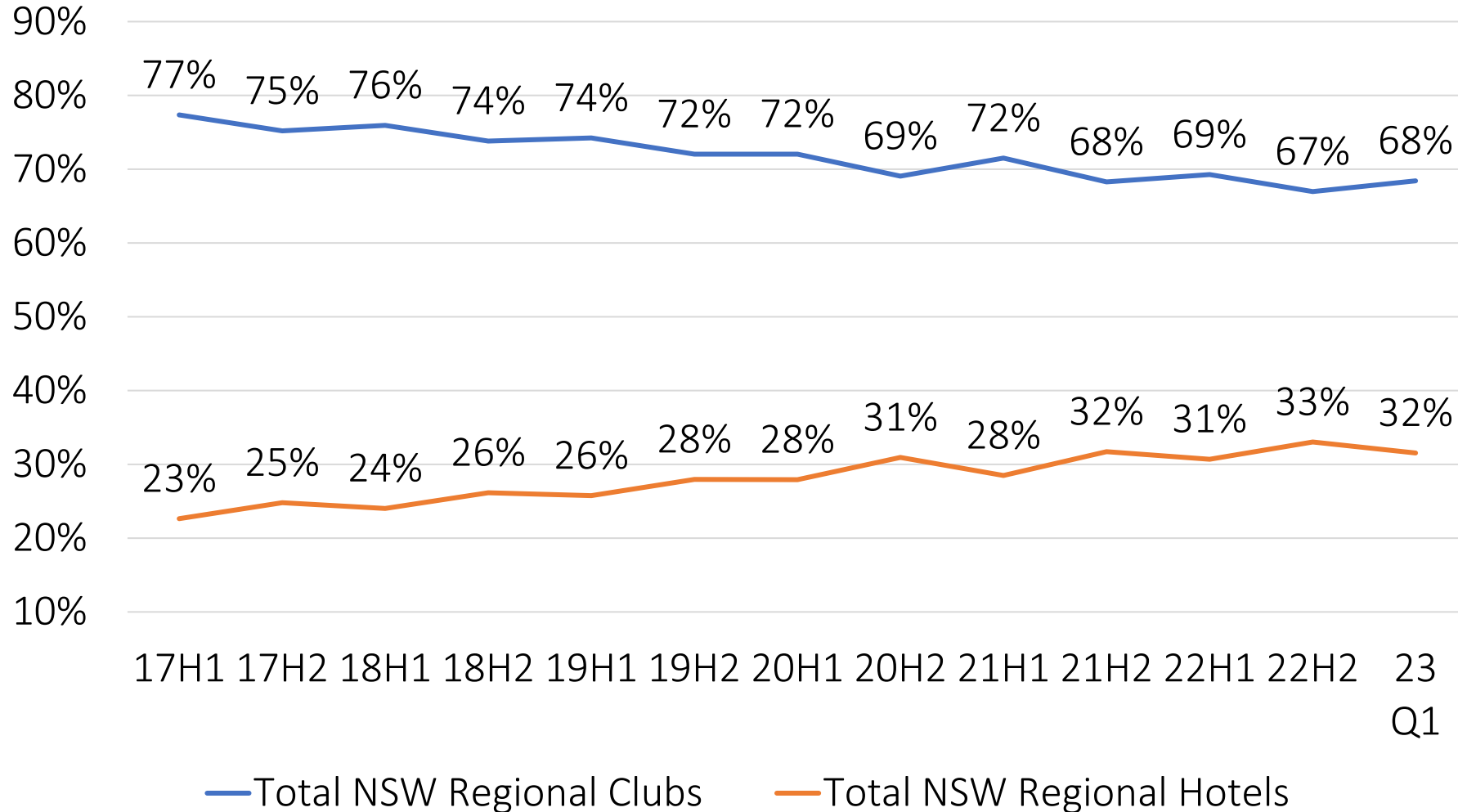
— Total Sydney Hotels

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- Sydney Clubs and Hotels battle for market share leadership
- Sydney Clubs +1% share latest quarter
- Share stabilization?

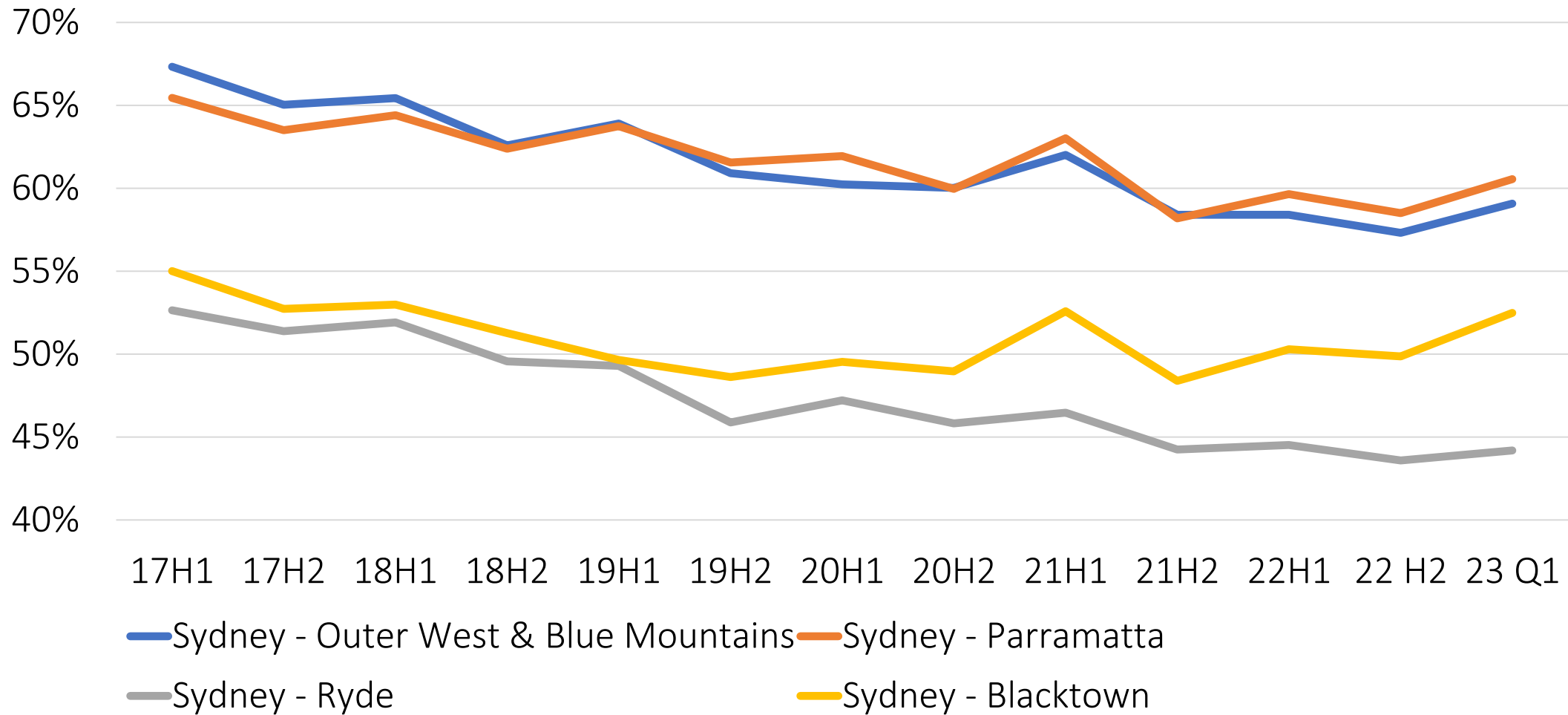
Market Share Regional NSW Clubs Vs Hotels



- Continuing trend of hotels gaining share
- Regional clubs still have strong lead over hotels
- Clubs +1% share in latest quarter

Sydney clubs market share trend

Market Share Clubs Sydney West

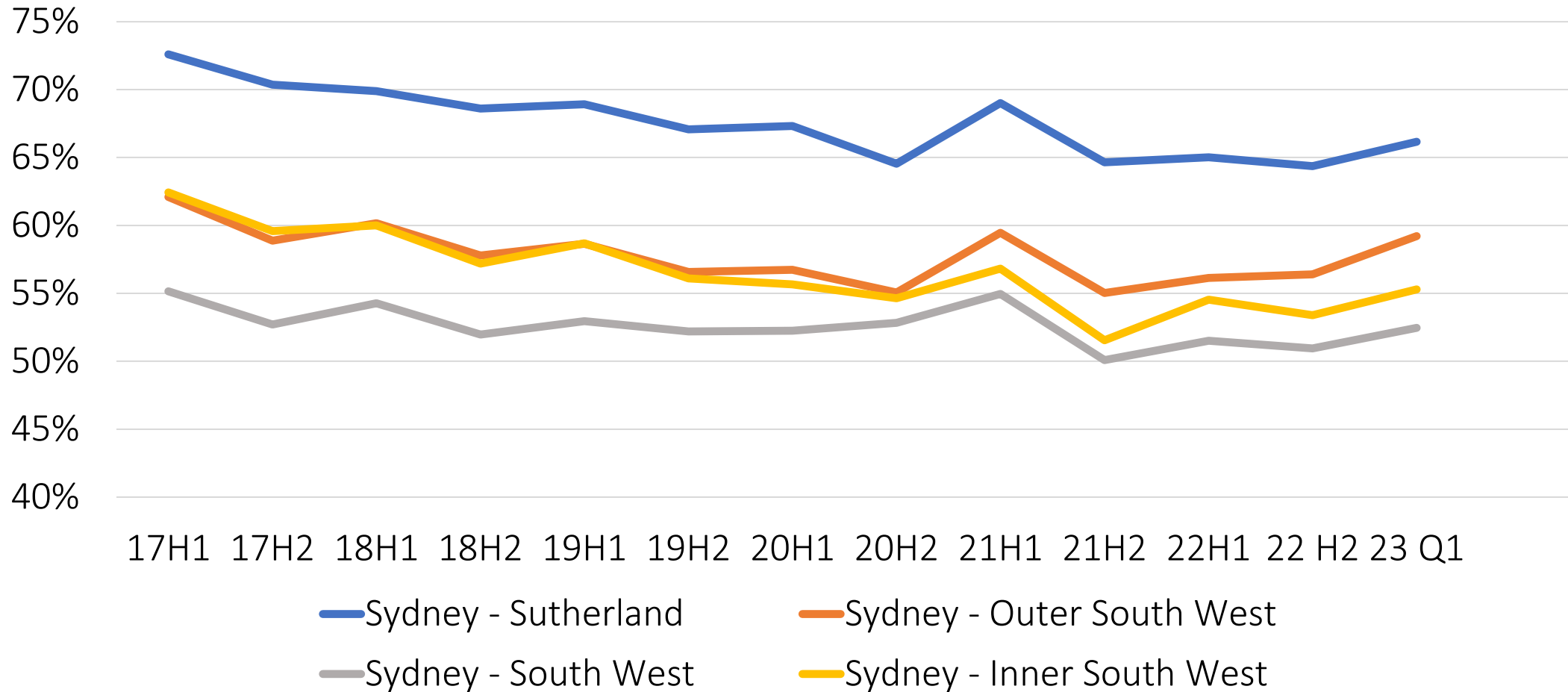


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Sydney clubs market share trend

Market Share Clubs South and South West Sydney

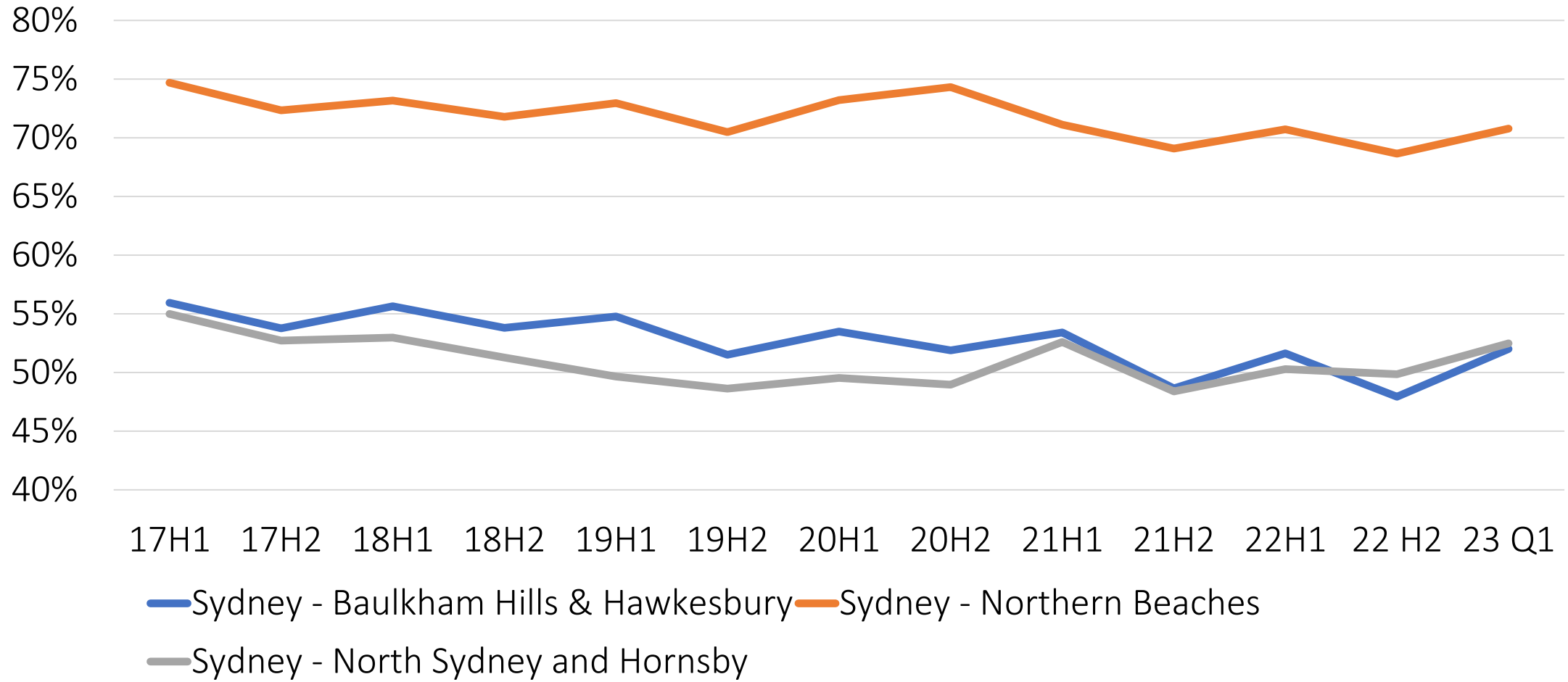


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Sydney clubs market share trend

Market Share Clubs Northern Sydney

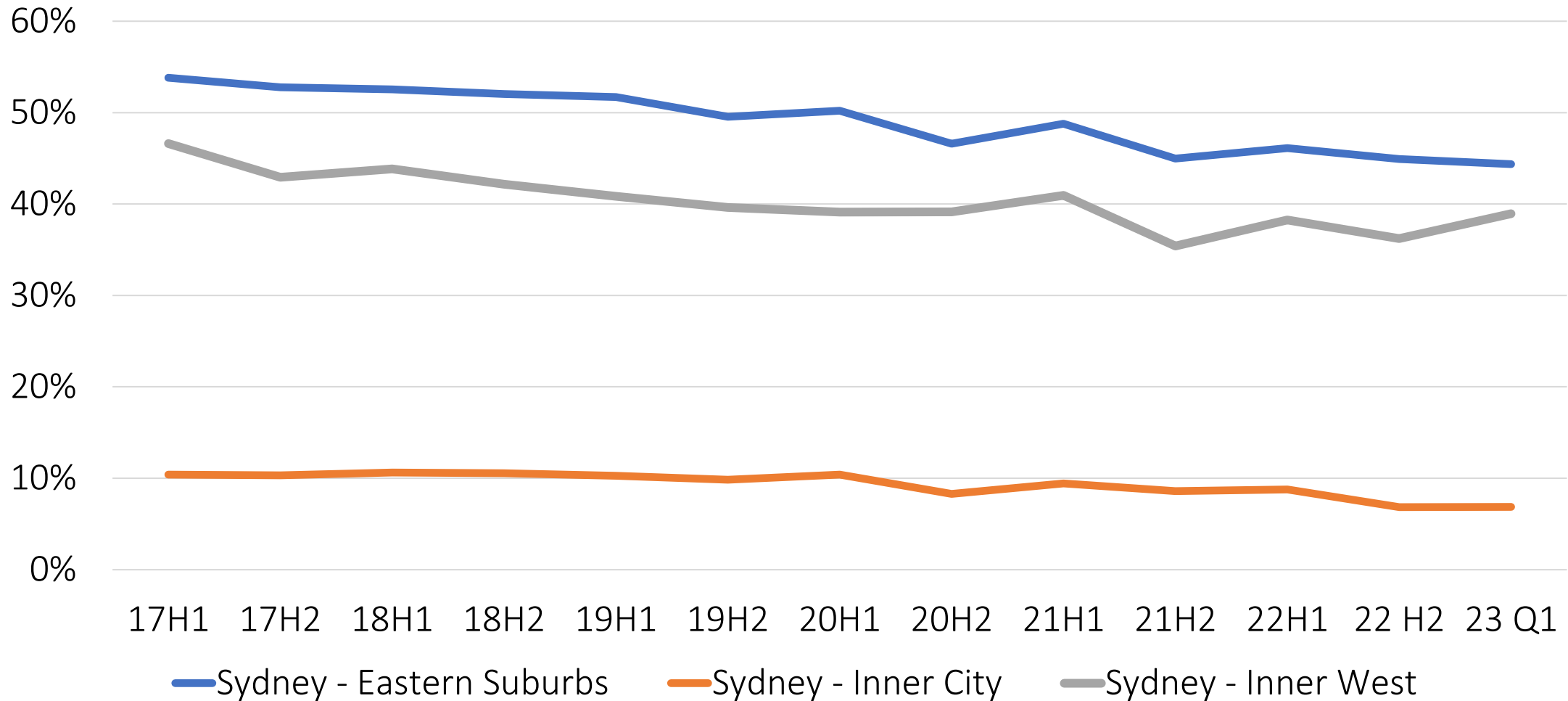


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Sydney clubs market share trend

Market Share Clubs Inner Sydney

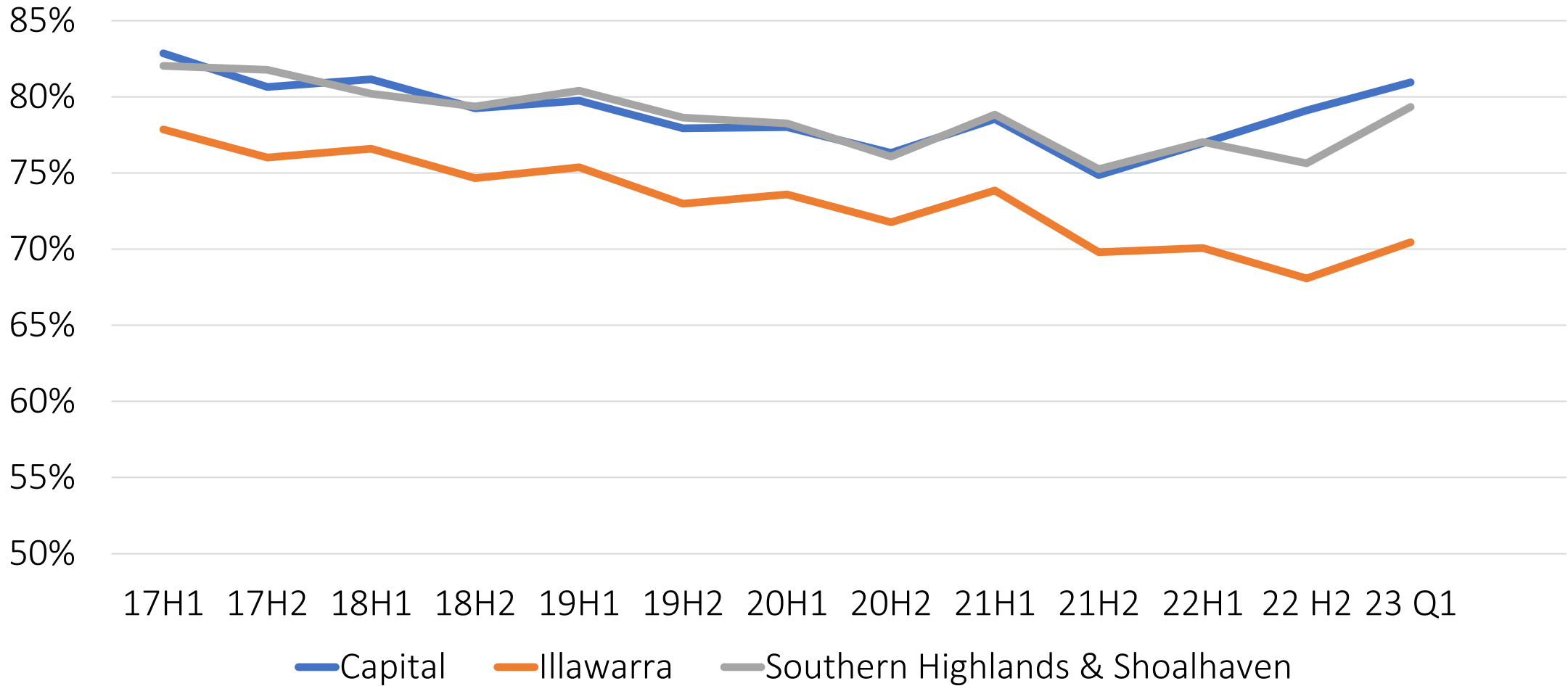


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Regional NSW clubs market share trend

Market Share Clubs South Coast

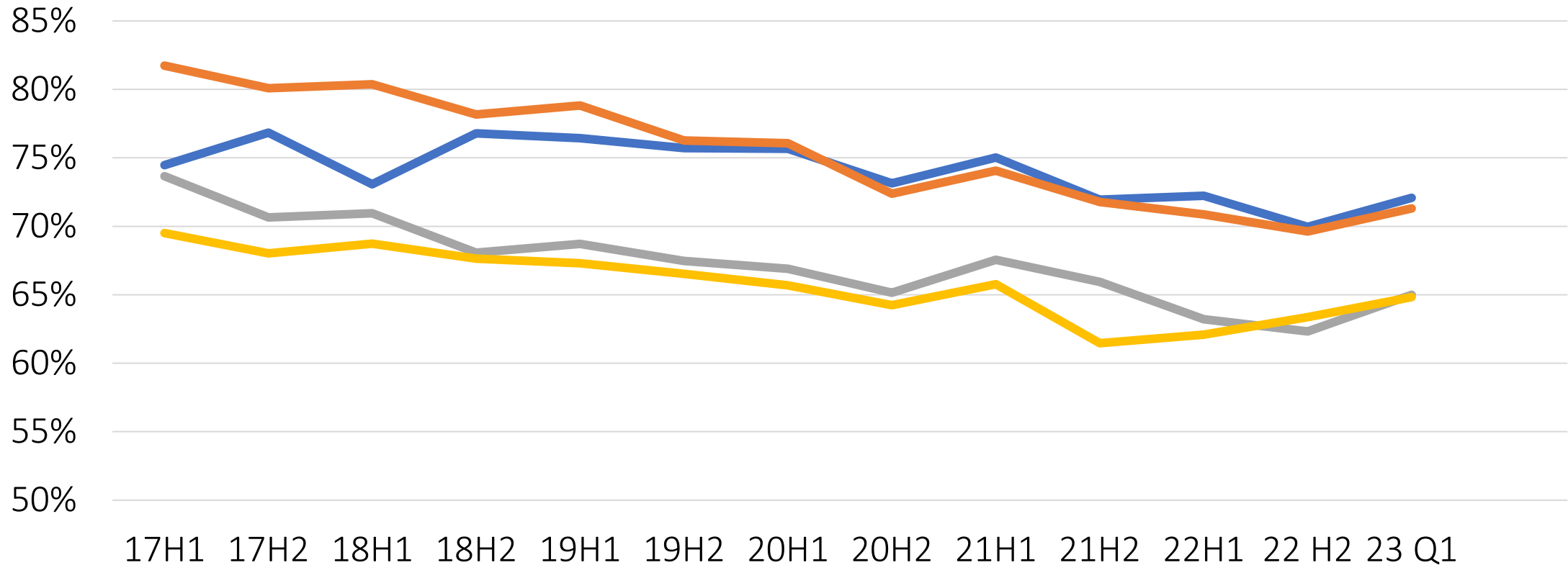


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Regional NSW clubs market share trend

Market Share Clubs North Coast



— Richmond Tweed

— Mid North Coast

— Coffs Harbour Grafton

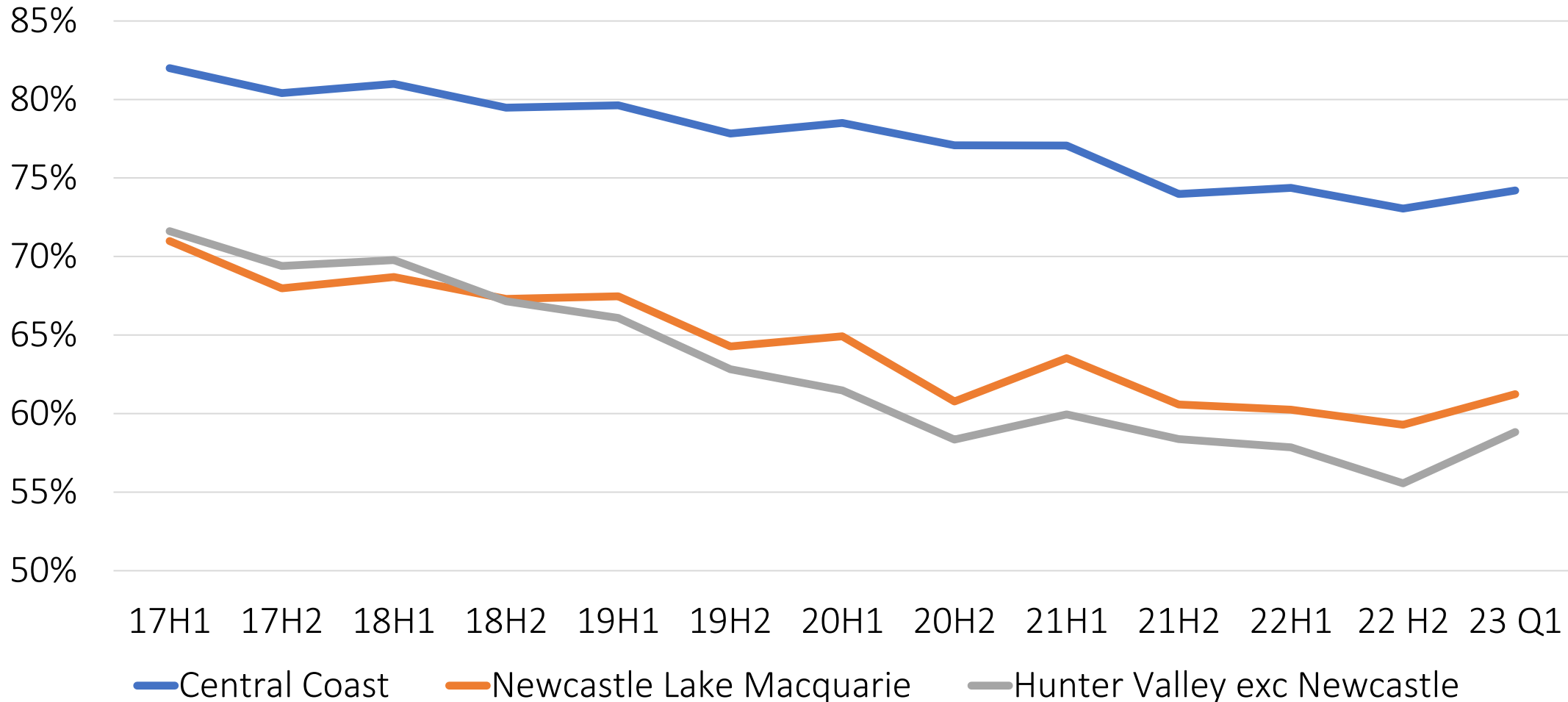
— New England and North West

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Regional NSW clubs market share trend

Market Share Clubs Mid NSW Coast

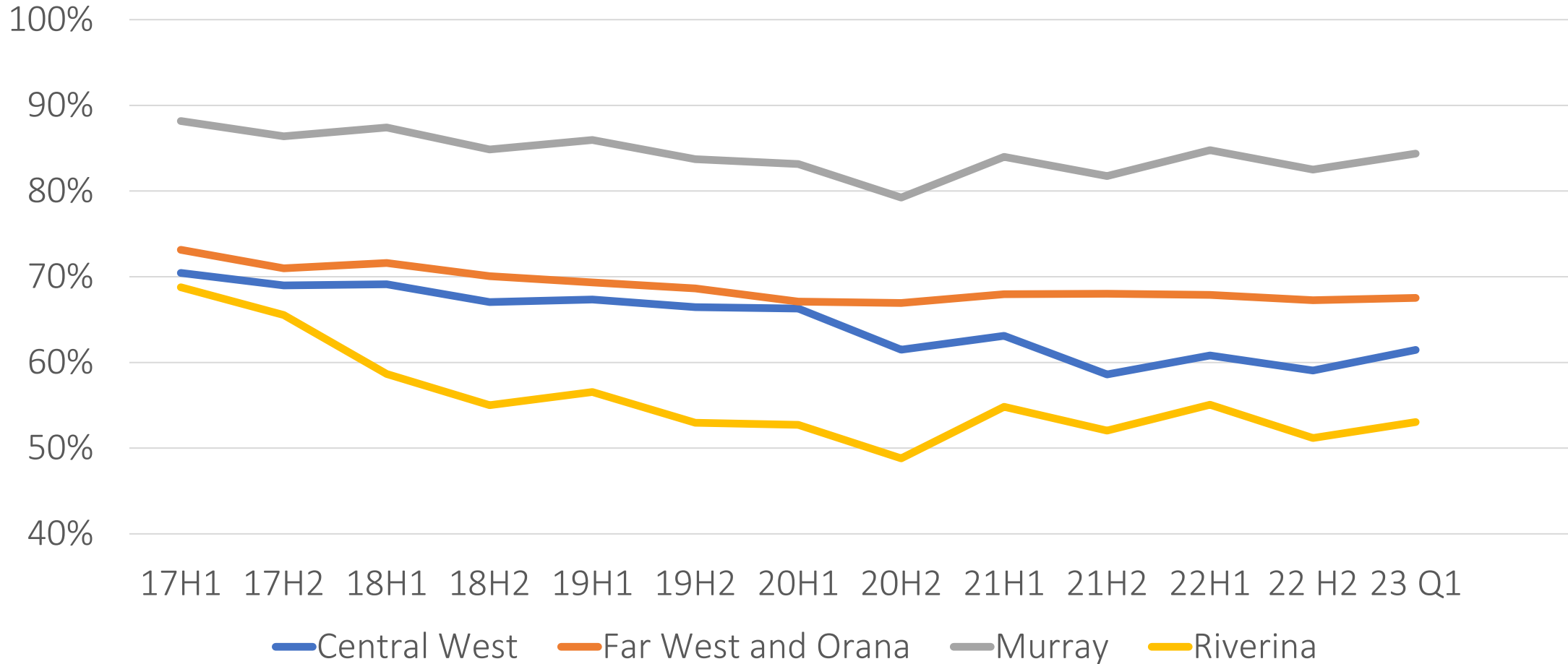


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Regional NSW clubs market share trend

Market Share Clubs Western NSW

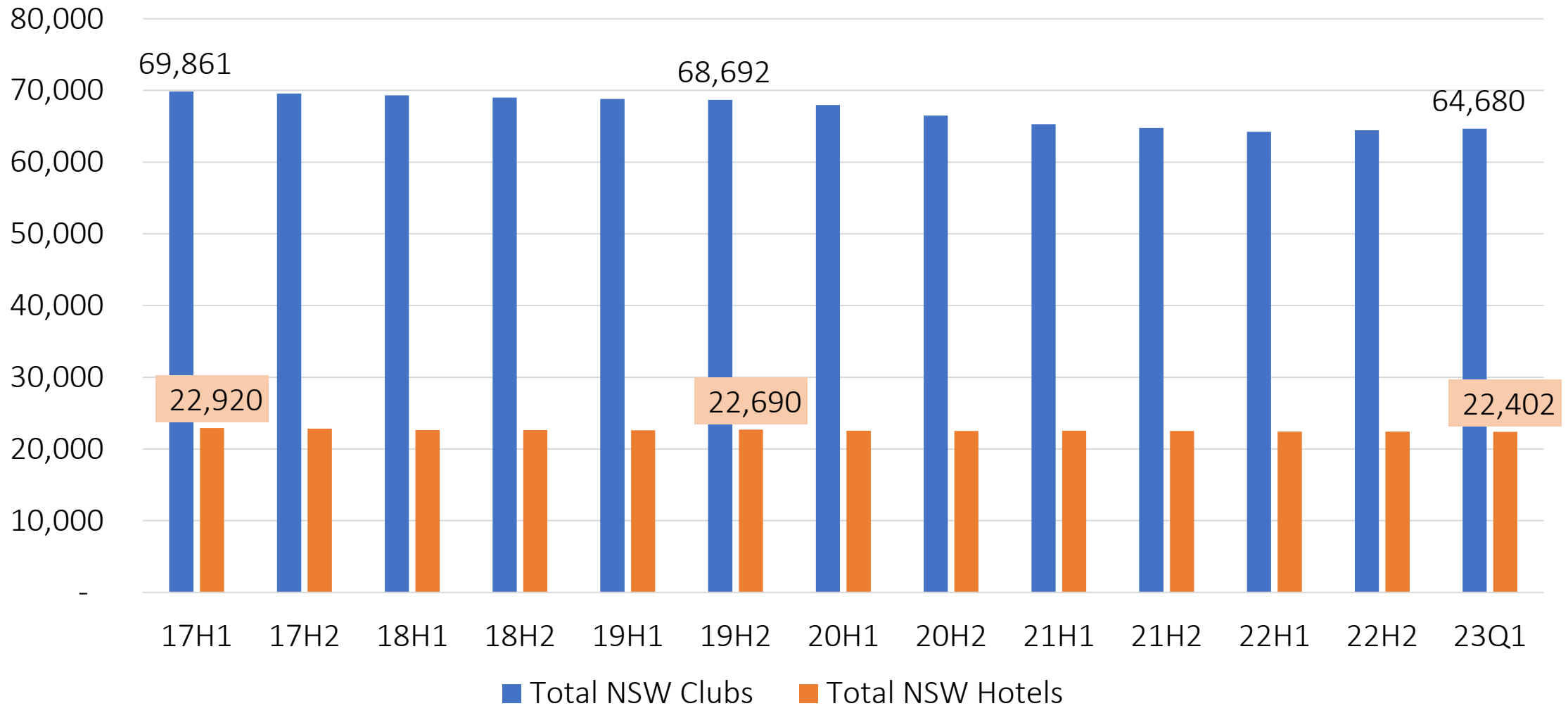


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Gaming Machine Numbers

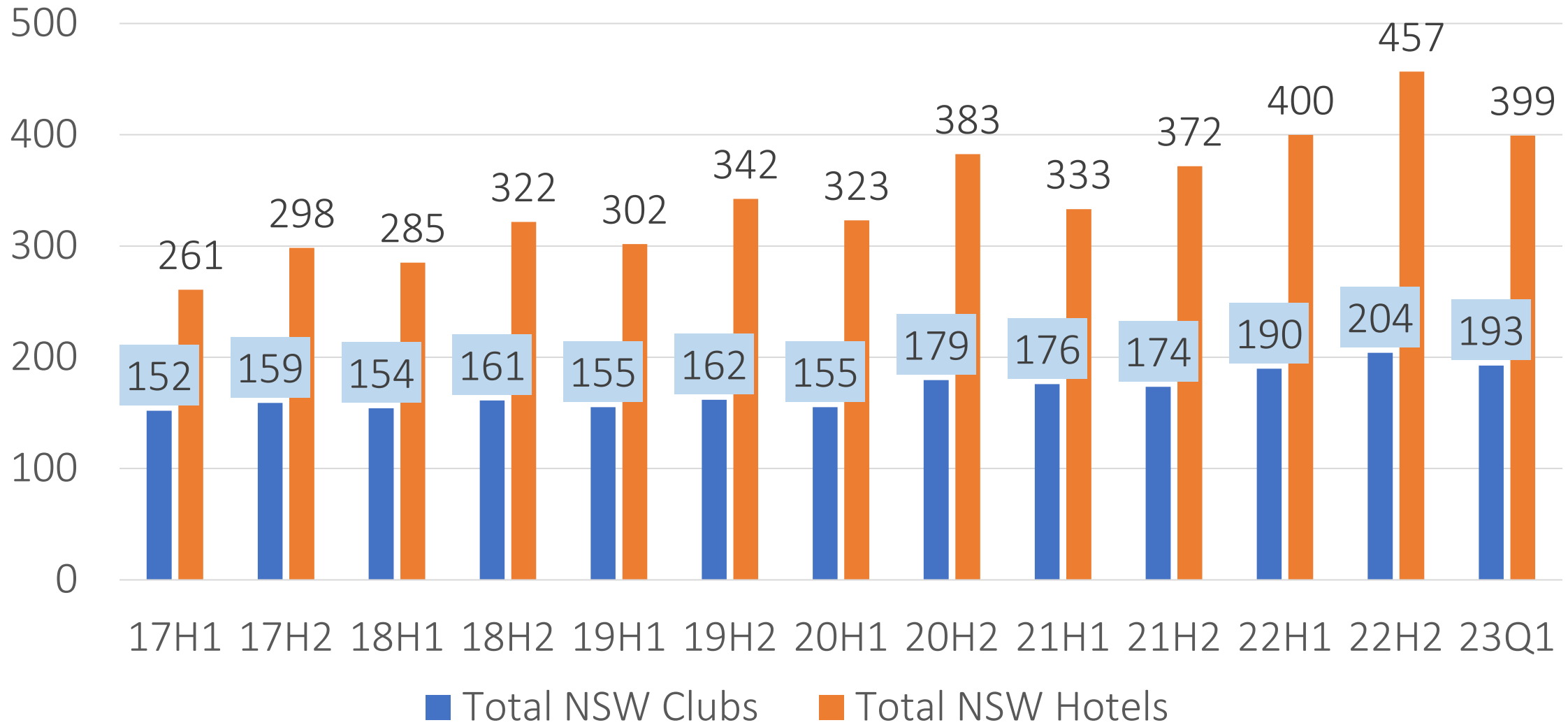
Total NSW Clubs vs Hotels



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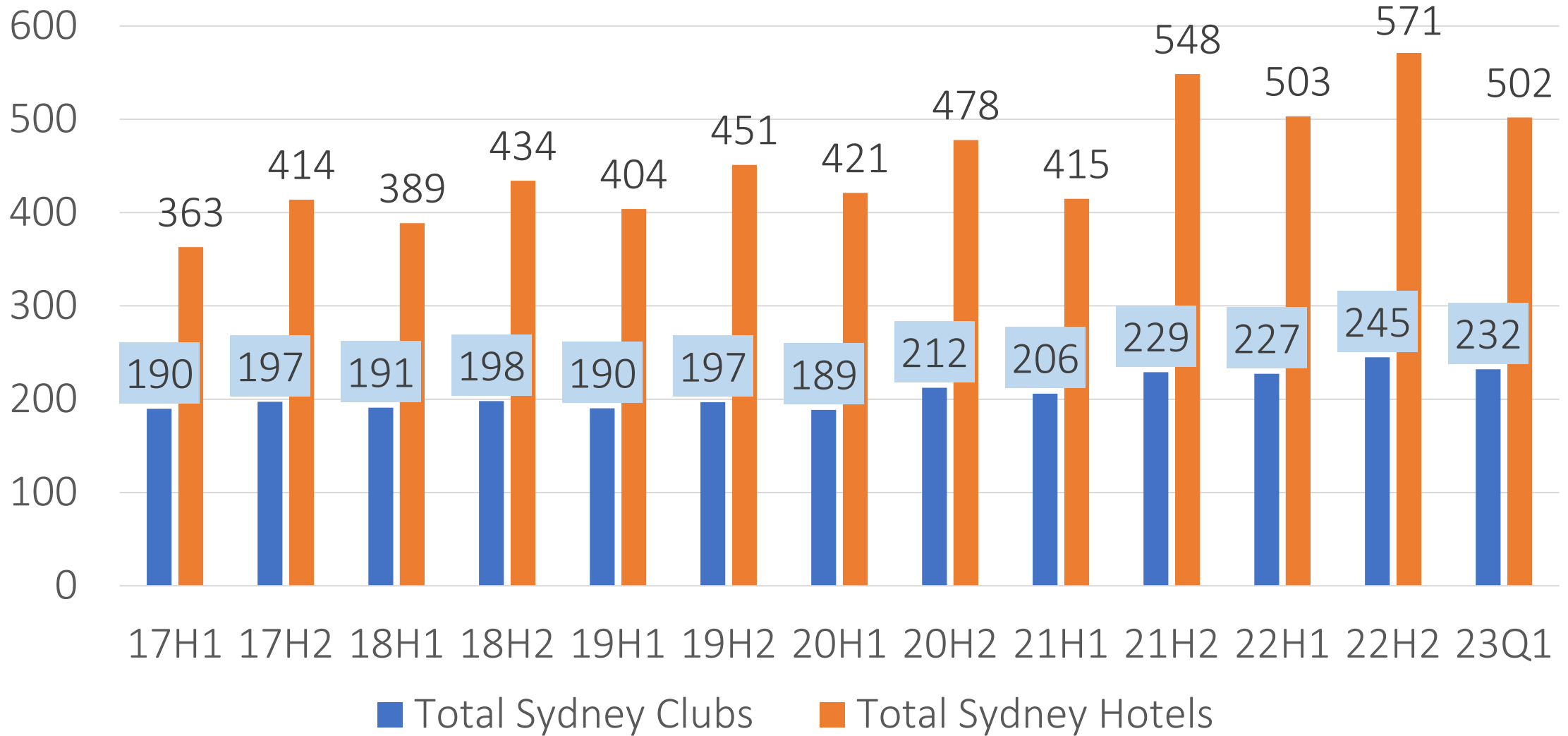
ADR NSW Clubs Vs Hotels



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ADR Sydney Clubs Vs Hotels

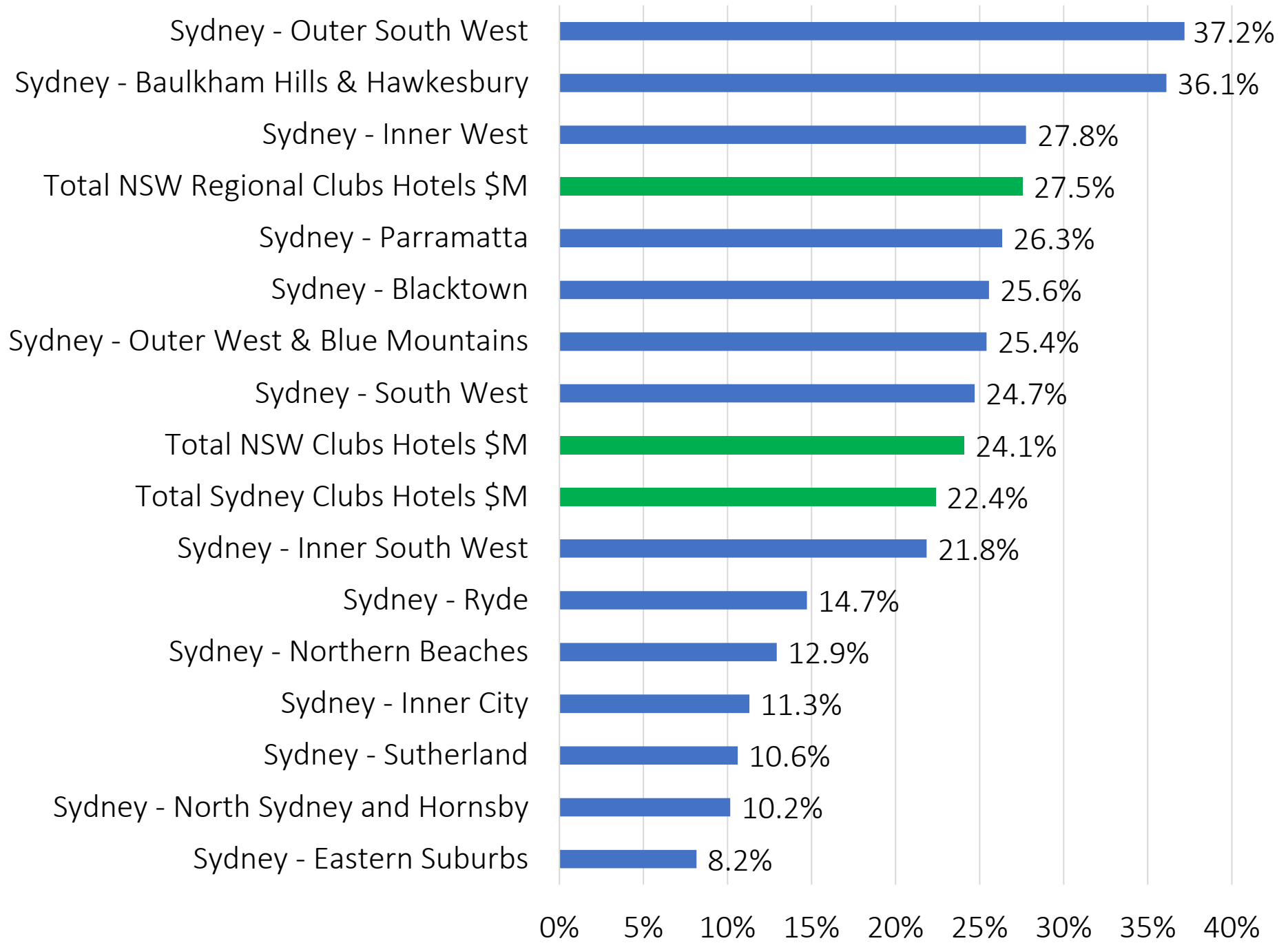


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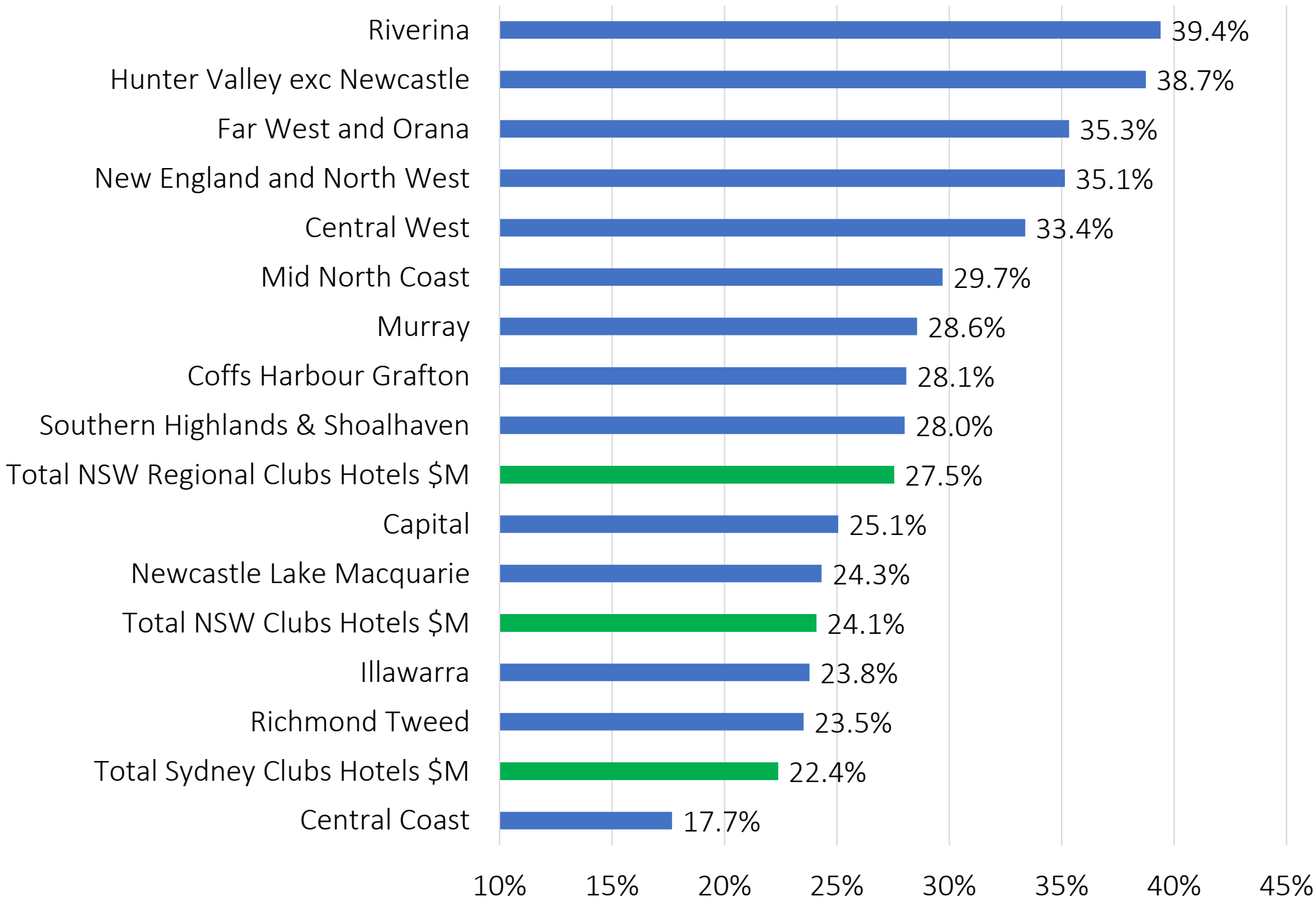


Sydney clubs &
hotels rolling
12-month
growth 2022/23
vs 2019/20 by
SA4 areas





Regional NSW
clubs & hotels
rolling 12-
month growth
2022/23 vs
2019/20 by SA4
areas





The take homes

- Very strong recovery in gaming in 2022 with market now worth \$8.1 Bn
- NSW growth vs 2019 +22% (14% real growth), + \$1.5Bn
- Sydney growth vs 2019 +20% (12% real growth), + \$1.0Bn
- However, the market is softening since the peak in QTR 3 2022
- Hotels are outgrowing clubs in the long term
- However recent last 12 months share turnaround favouring clubs
- Market share trend continues to favour hotels
- Many LGA's growing very fast in the last year +20 to 40%



Revenue Pulse Survey

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Revenue outlook Pulse

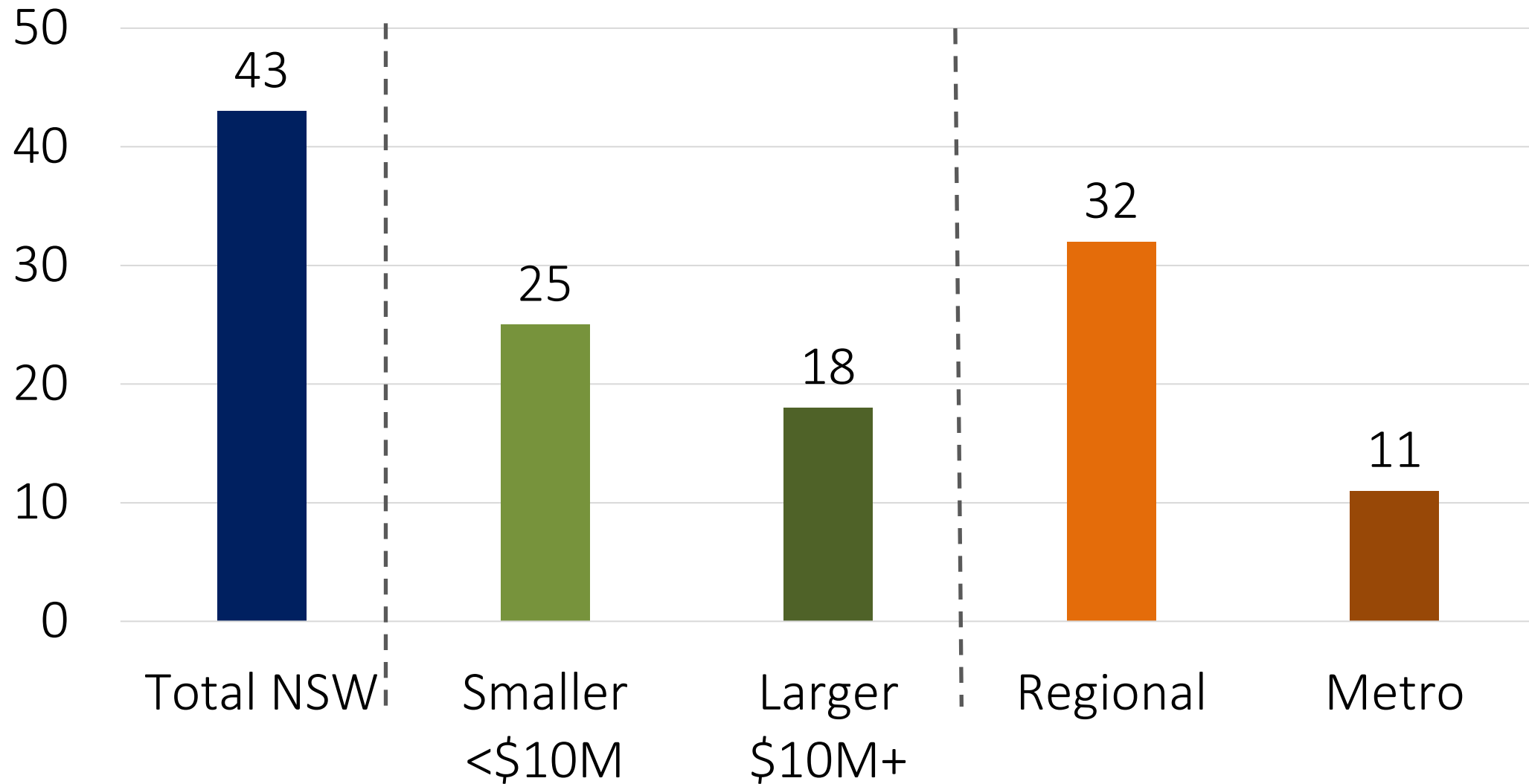
- ❖ CMAA & Wohlsen Consulting initiative – plan to conduct every 6 months and track pulse vs actuals

What is your outlook on gaming, bar, food revenue growth in current and next 3 half years?

February 23 Responses

NSW	43
Qld	10
Vic	6
ACT	4
Total	63

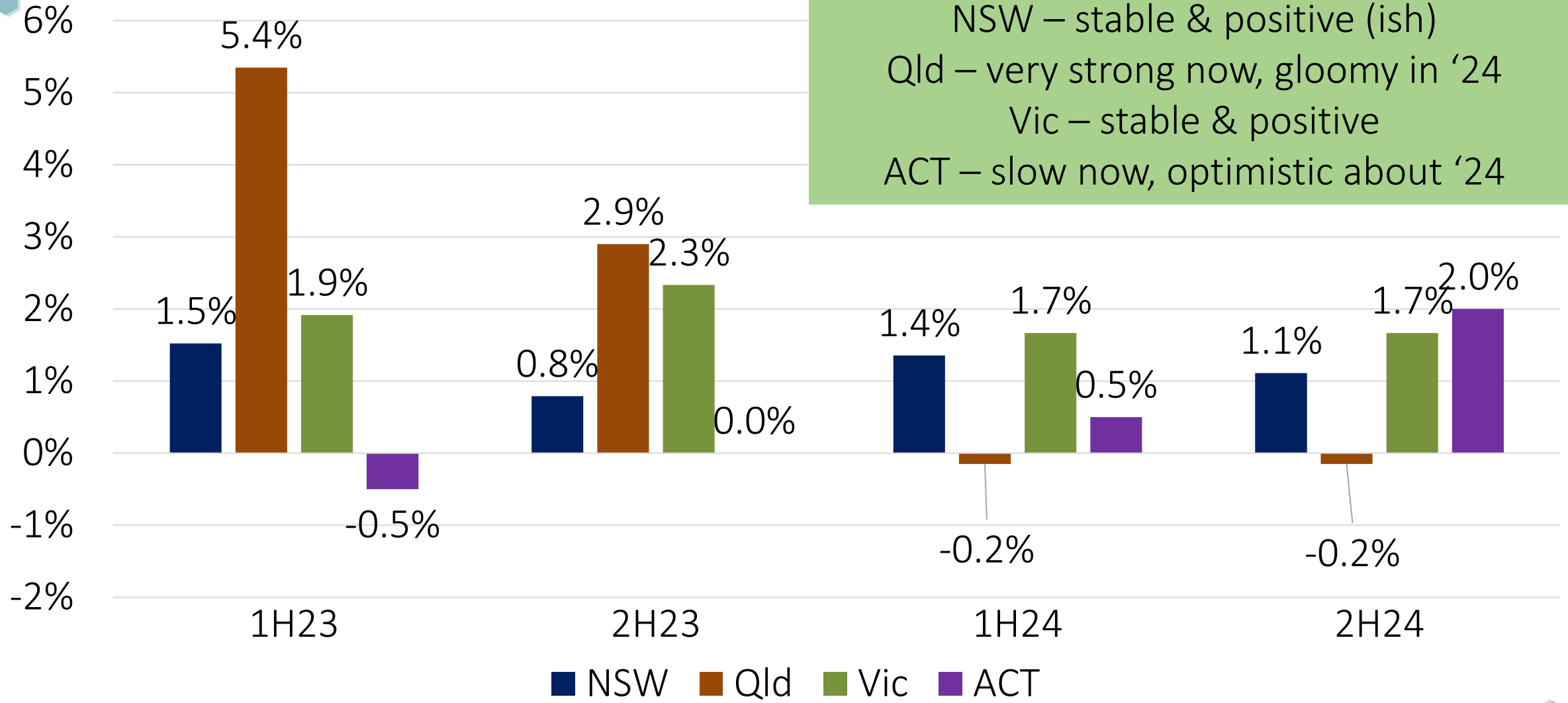
NSW response profile



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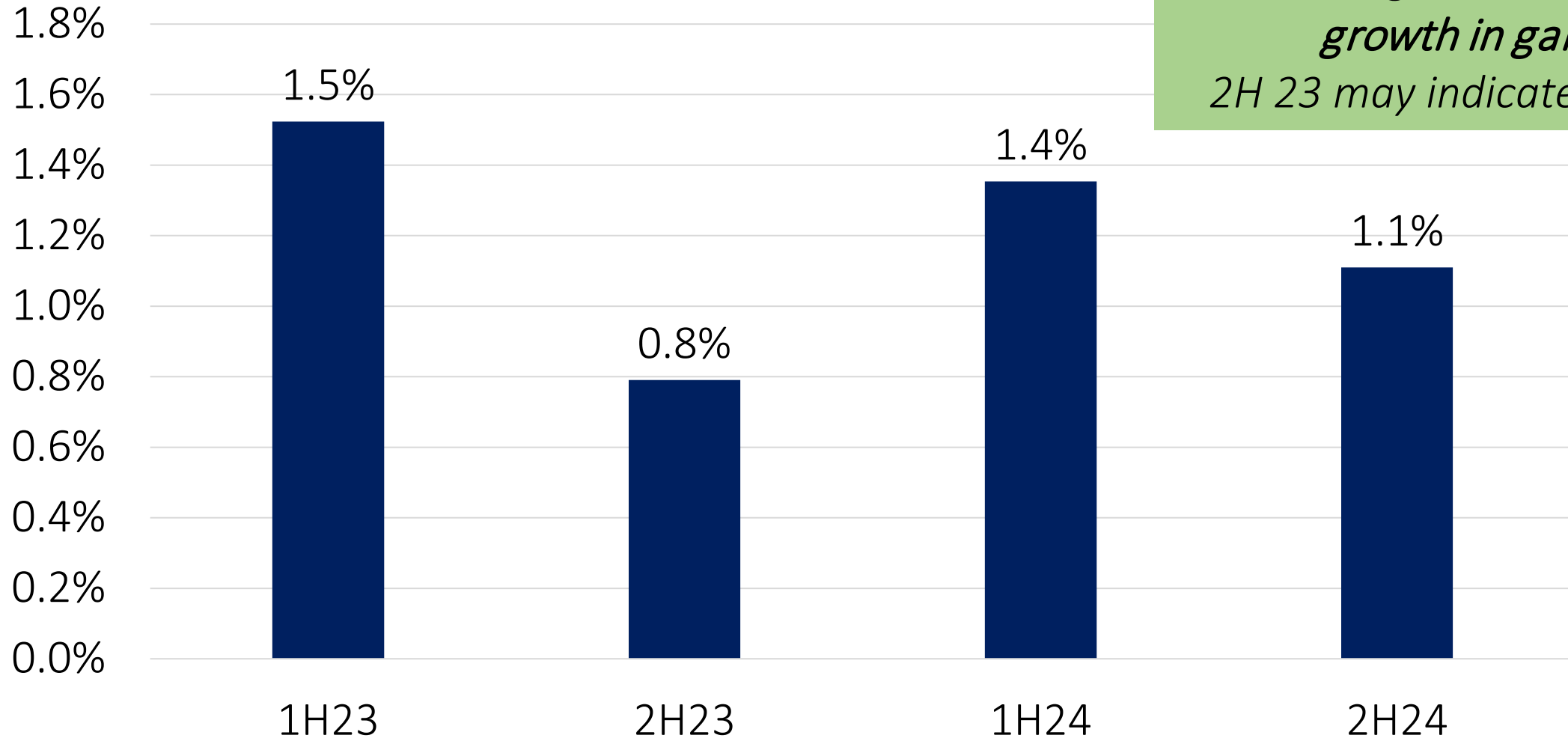
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Gaming – NSW, Qld, Vic & ACT



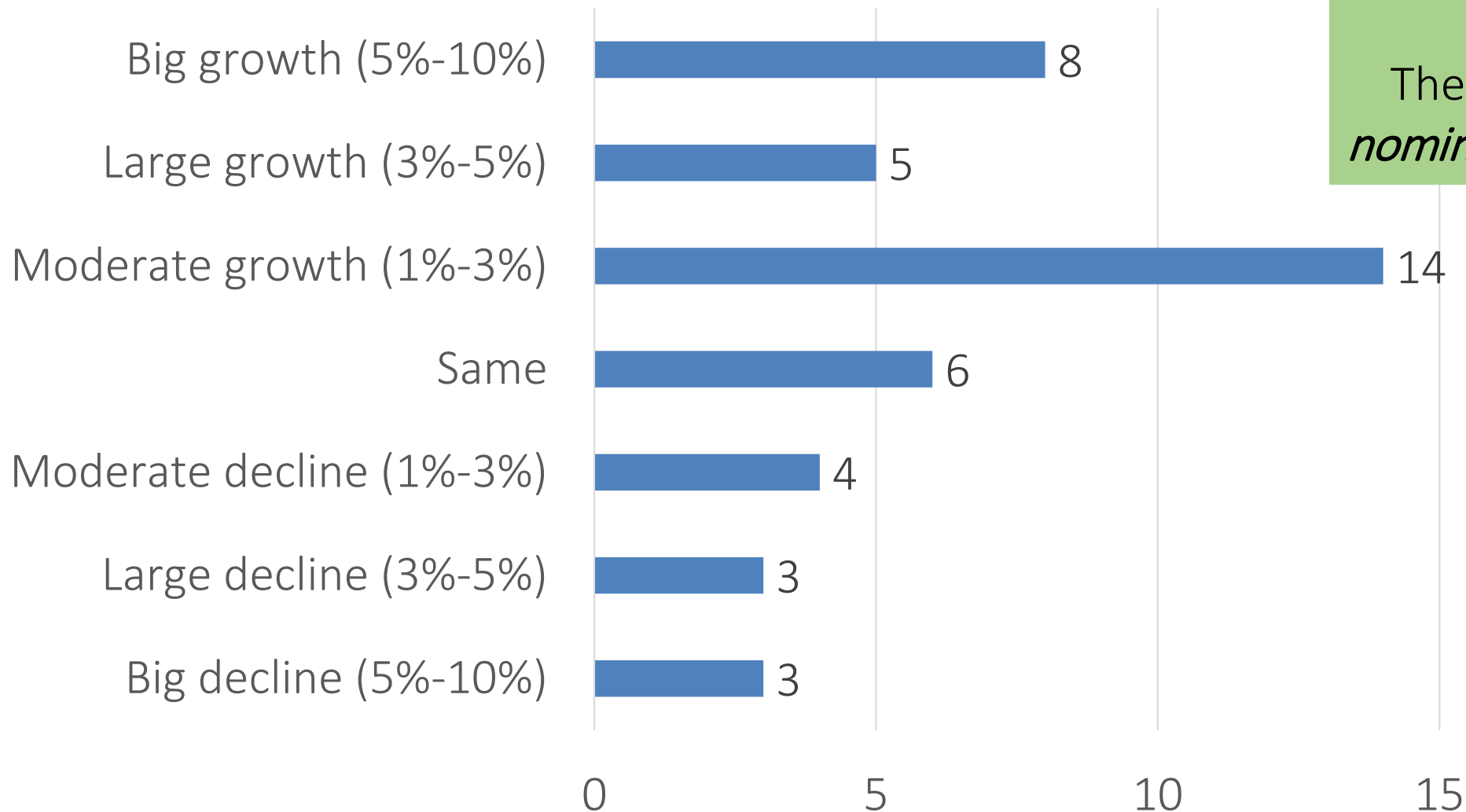
NSW Gaming - all sites

There was a significant range of responses – no consensus
The average view was *nominal growth in gaming*
2H 23 may indicate softening



NSW Gaming Outlook –2023 H1

Responses by Growth

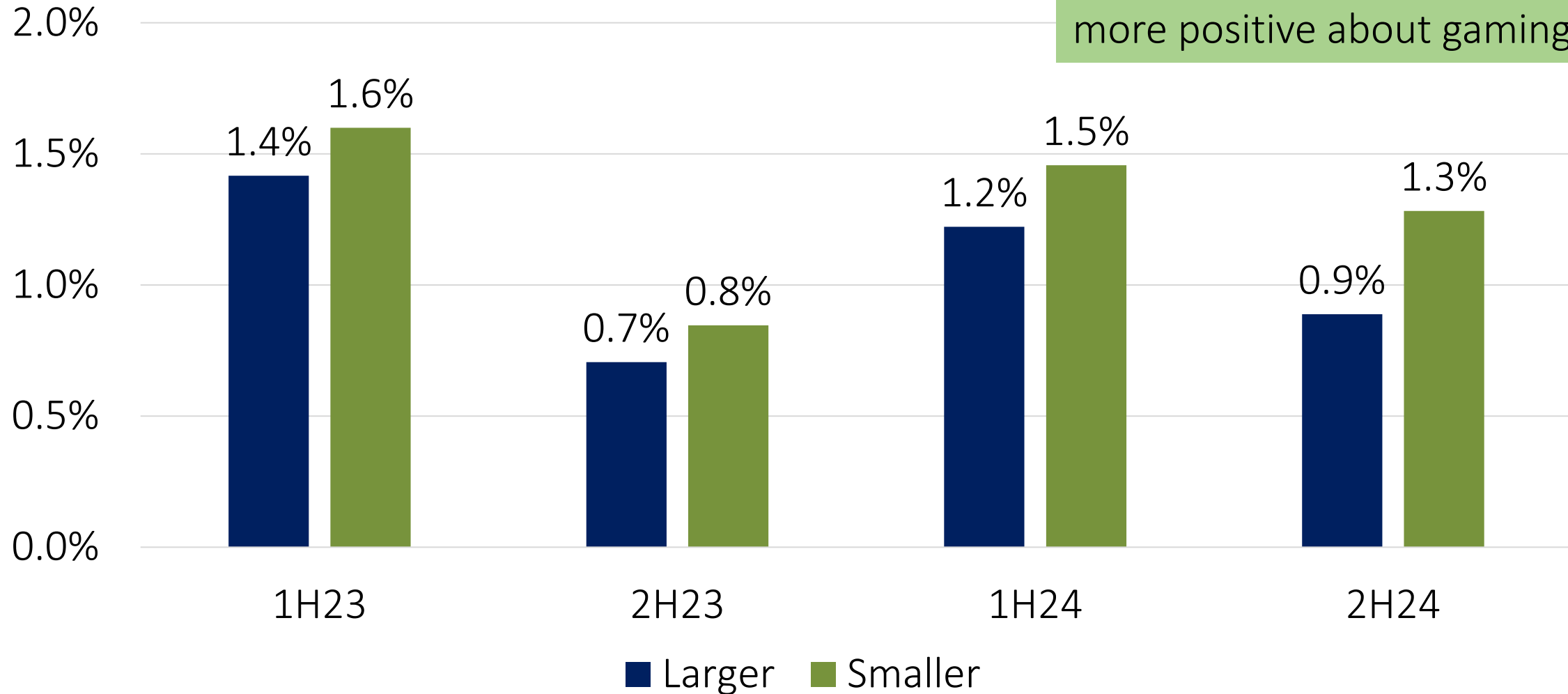


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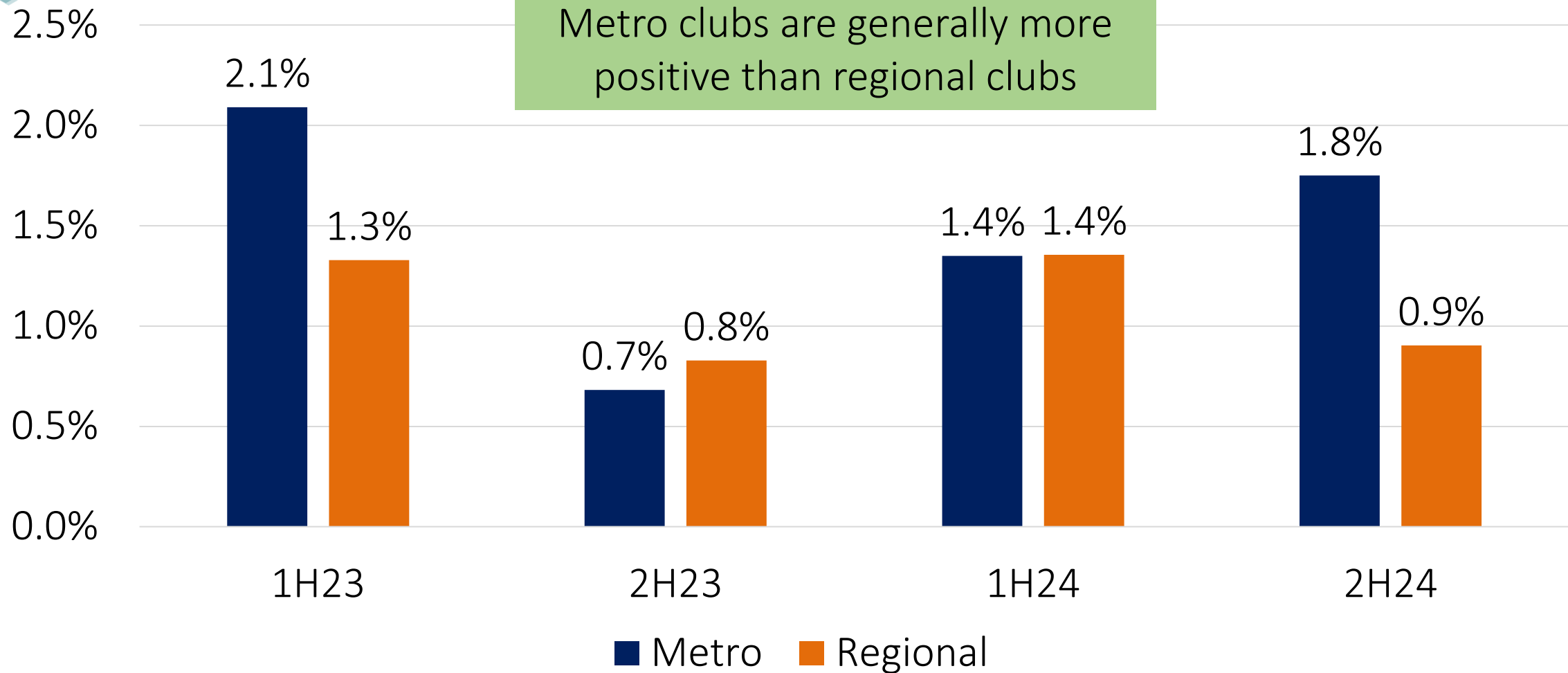
The average view was *nominal growth in gaming*

NSW Gaming – by revenue size

Smaller clubs (<\$10M revenues) are more positive about gaming growth

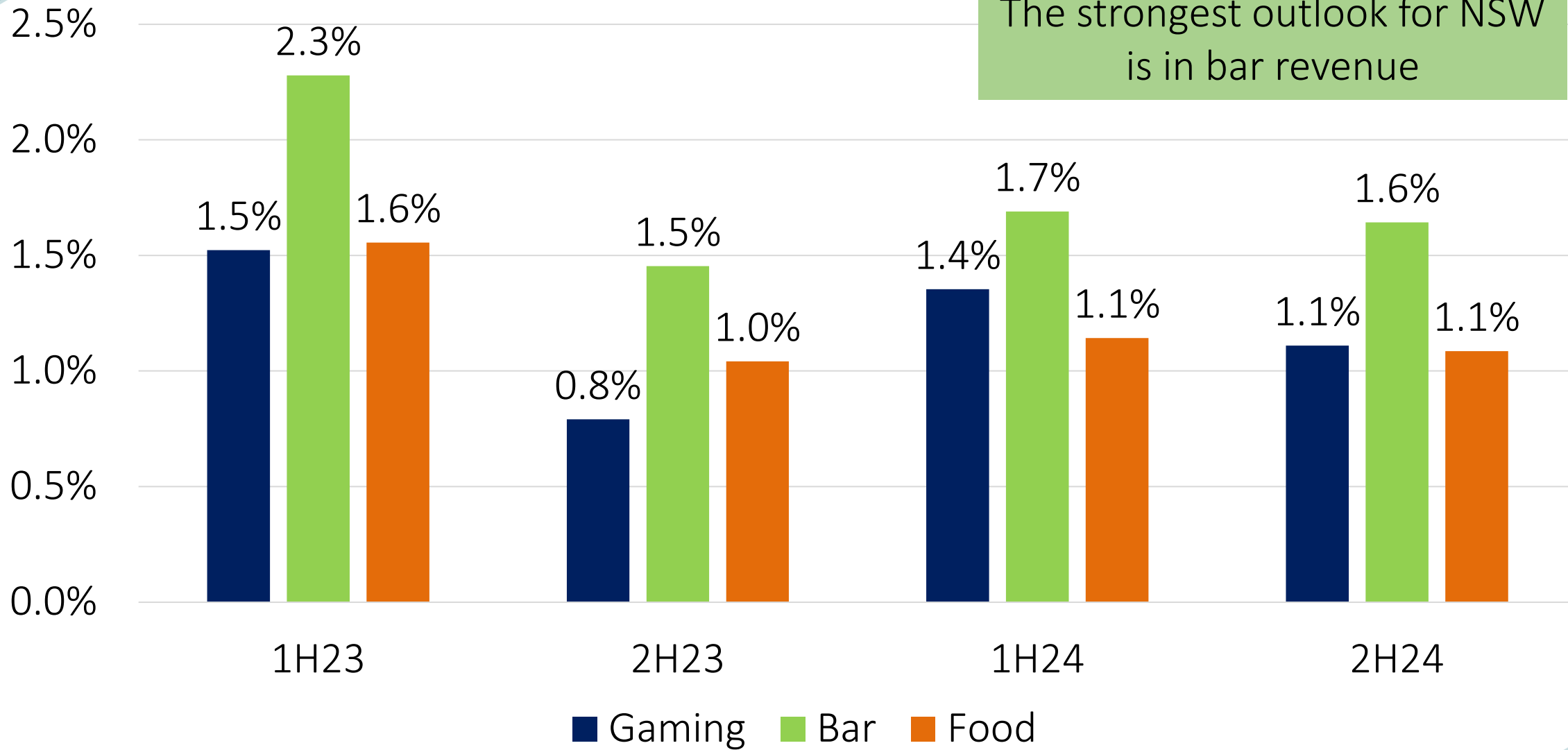


NSW Gaming – Regional v Metro



NSW in summary

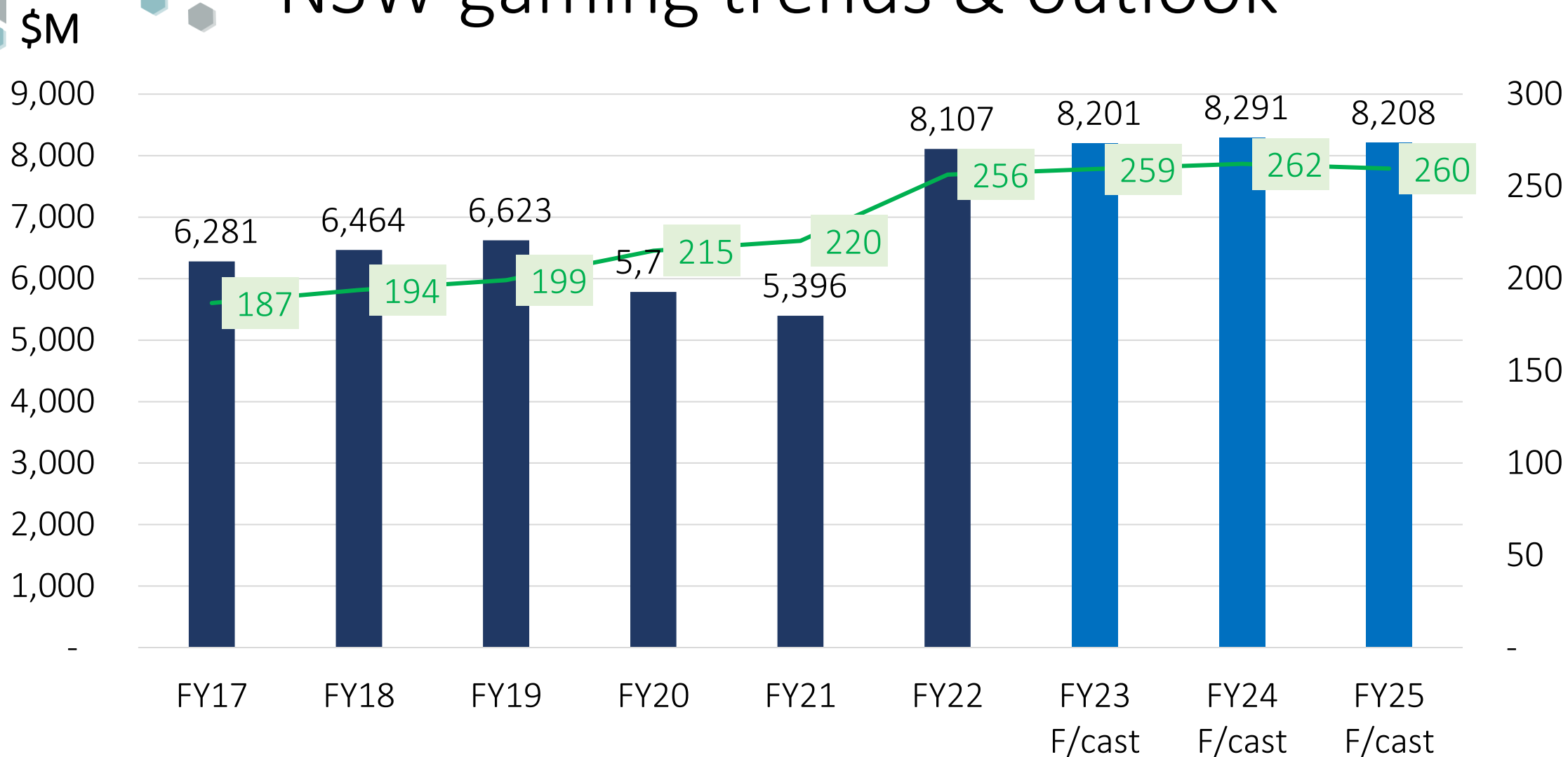
The strongest outlook for NSW
is in bar revenue



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NSW gaming trends & outlook

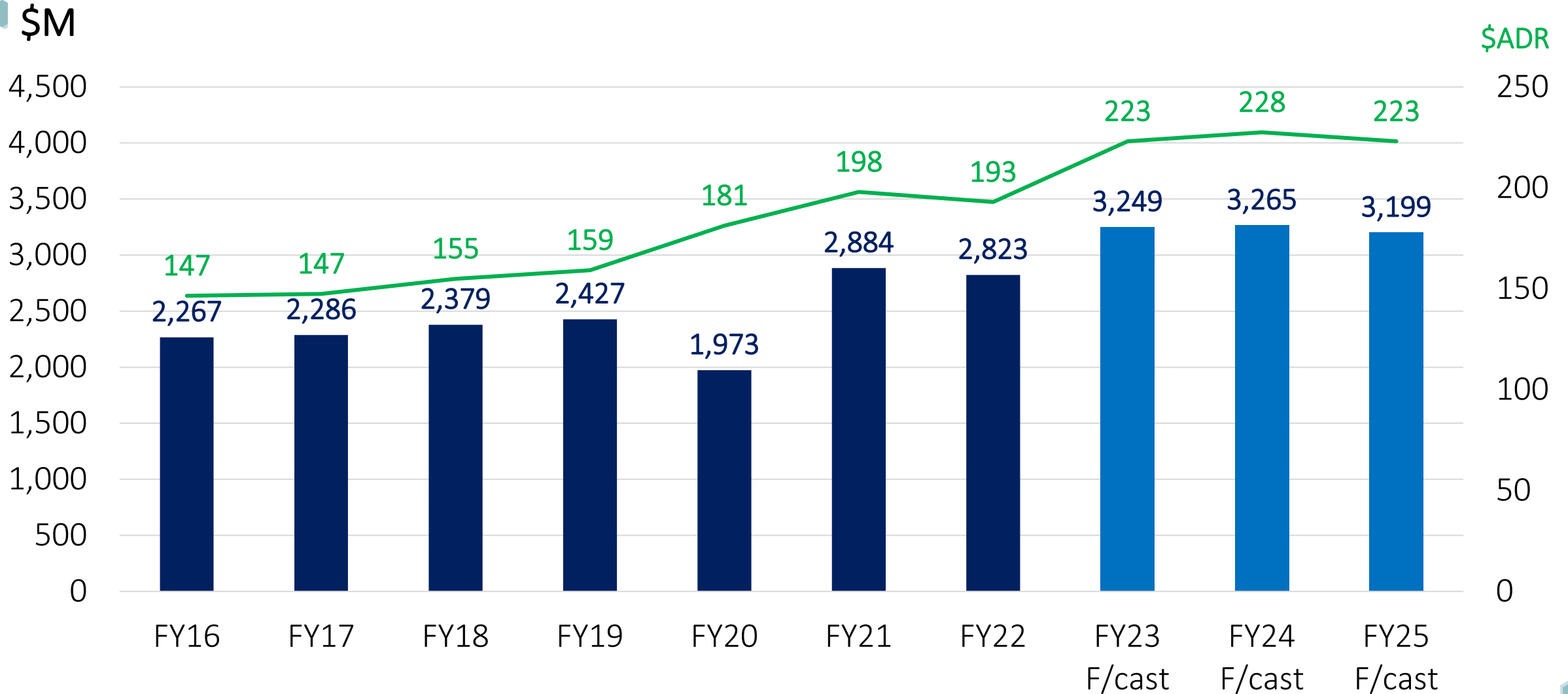


■ NSW total expenditure — ADR

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Qld gaming trends & outlook



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NSW in summary

- ✪ It's important to note that the results were very mixed and there was no real “consensus view”
- ✪ Gaming outlook is constant but low growth
- ✪ Smaller clubs and metro clubs are a bit more positive
- ✪ Bar outlook is strongest, then gaming, then food
- ✪ Food outlook is constant but low growth



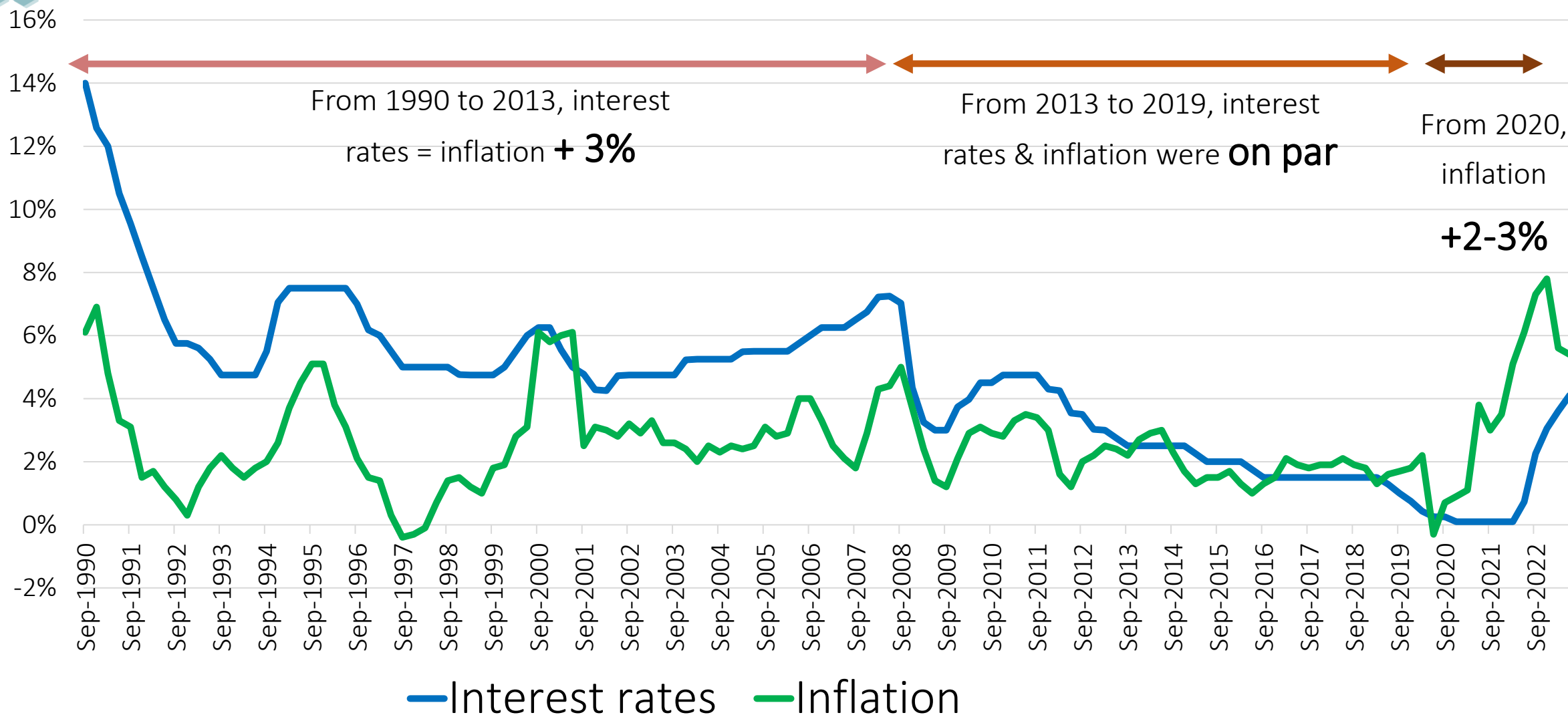
What might 2023 & 2024 look like

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Inflation v interest rates



Where interest rates are biting most

- 30-34 and renters are feeling the most cost-of-living pressure
- Annual spending for over 35's increased by 7.7%
- Annual spending for under 35's increased by 3.4% but trending down
- Young people are choosing to go out less, although their average spend on these occasions has increased

CommBank iQ

Powered by  quantum

**Cost of Living
Insights Report**

May 2023

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Commentary

- Interest rates seem to be starting to bite into inflation but there is still a long way to go to get it back to below 2-3%
- RBA says that rate increases may continue into 2025, depending on inflation
- 30-34 year-olds & renters are feeling the most pressure
- This should impact hotels mainly
- Clubs may even grow over hotels in markets where there is:
 - Strong home ownership or equity
 - Empty nesters still working
 - Low unemployment



CMAA Cashless Card Impact Industry Paper

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CMAA NSW Cashless Card Impact Industry Study

- ❖ International experience in developed markets Norway and Canada showed that a mandatory government card reduced gaming spend by 30%.
- ❖ An economic model developed by a major advisory firm shows a 30% reduction in revenue could cost 9,000 club jobs and reduce community contributions by \$30 million.
- ❖ The estimated cost of installing the technology is almost \$1 billion based on an average cost per machine of \$8,500.



CMAA NSW Cashless Card Impact Industry Study

- Wohlsen Consulting engaged by the CMAA to develop an industry paper
- Scope of CMAA Study
 - NSW clubs – 35 Clubs have provided financial data – Last chance for any more clubs to support
 - 3 tiers – Large, medium, and small clubs,
 - Metro vs regional as profitability varies (lower in regional clubs)
- Impact study to cover total club revenues focusing on gaming, food and beverage, departmental and overhead expenses- fixed and variable, depreciation,



CMAA NSW Cashless Card Impact Industry Study

- Assess impact on:
 - Wages expenditure, employment (head count and full-time equivalent employment, job losses),
 - Potential outsourcing or scaling down of outsourcing / contracting activity,
 - Training and personnel development (including apprenticeships),
 - Community contributions, sponsorships, donations, grants,
 - Advertising, marketing, promotions,
 - Member amenities and services,
 - Capital expenditure



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National Club Member Visitation Survey Opportunity

*National Online Industry
Member Survey*

*Target 100,000 member
responses*

*Opportunity to Understand
Members Behaviours
Attitudes and Intentions*

Club Visitation

*Aggregated Results National
and by State
For Benchmarking*

*Private club specific report and
consultation*

The is a key national initiative to support individual clubs and the industry

*Survey
Participation
Target*

State	2023 Target	2022/2023 Cumulative Target
NSW	30	60
Vic	10	15
Qld	10	15
ACT	5	5
Total	55	95

Club Member Visitation Survey Insights

Club Importance rating –
community, social needs

Club visitation
(frequency and
recency)

Visitation to other clubs,
hotels, casinos

Good Gamers and Weekly +
Visitors

***Analysis segmented by
member demographics
and high value members***

Visitation drivers

Member Suggestions

Ratings of club
facilities and
experience

Tailored questions

Staff and Service by
Department

Net Promoter Scores
showing likelihood of
recommending club

Spending behaviour
and general behaviours

National results to date



45 clubs completed
Target 90+ clubs by
2023



Net Promoter Score
59% Excellent



15% spend over \$100
on gaming



Responses
30,000+
12%



44% visit weekly +



Favourite
venue



49% play



Club importance
rating 7.8



Age – 62 years

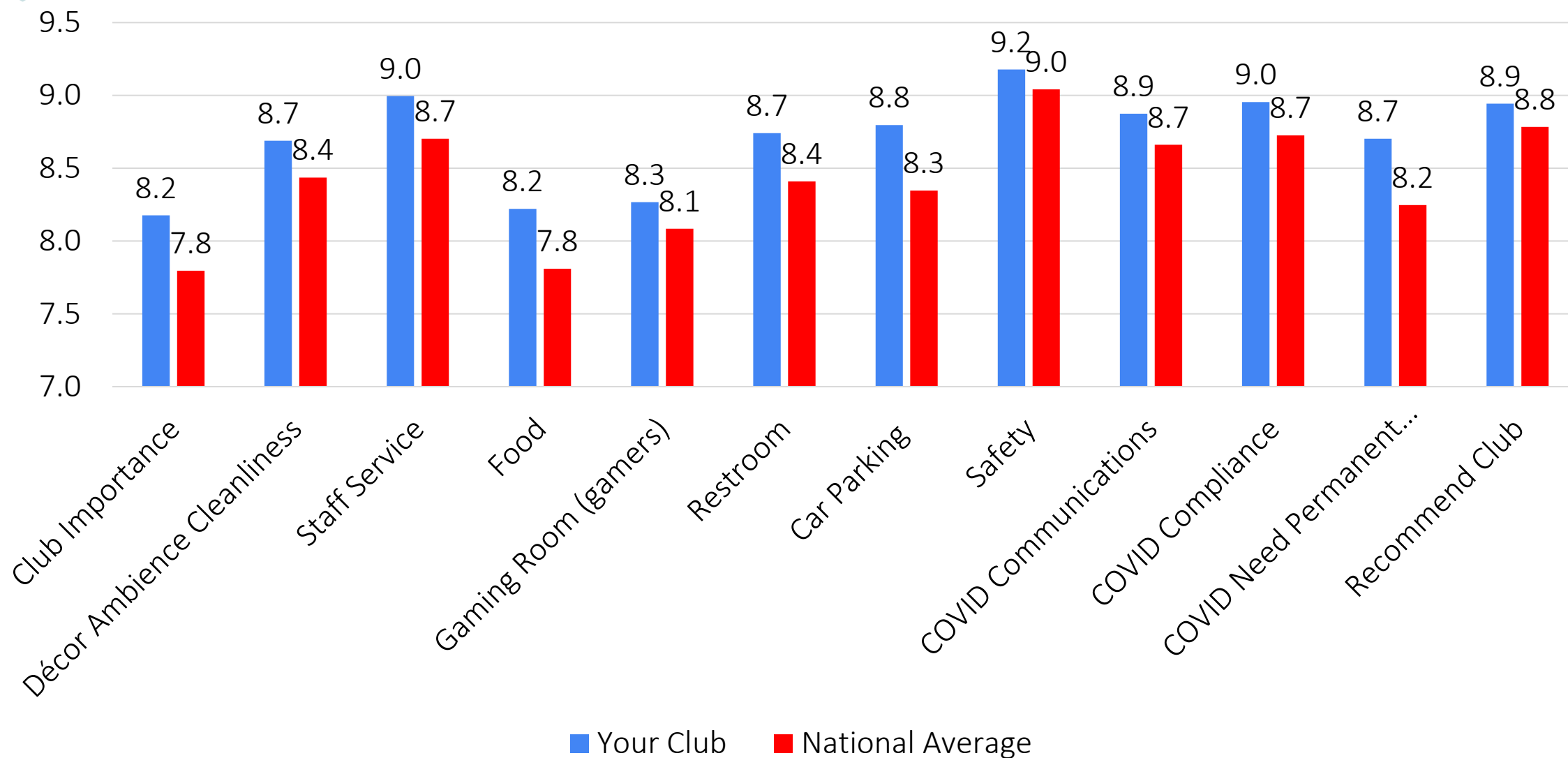


Bar \$28
Food \$35

Member Survey Benchmarks by State and Club Size

	Benchmarks Summary								
	National	NSW	NSW Regional	NSW Metro	South Coast	QLD	Victoria	Medium Clubs	Large Clubs
Members Sent Survey	269,000	35,000	25,700	69,600	20,950	31,100	11,400	95,000	164,000
% Response rate	13.0%	12.6%	13.2%	10.4%	16.7%	14.7%	14.5%	14.2%	10.7%
Average Age	61.1	60.5	60.9	59.1	63.0	61.1	64.8	61.9	59.5
Average Annual Visits per Member	57.9	55.3	54.7	57.5	58.1	53.8	76.9	61.6	50.5
% Visiting weekly or more	38.5%	37.7%	36.9%	40.8%	40.0%	40.7%	41.5%	39.8%	35.9%
Average activities per visit	2.5	2.6	2.6	2.5	2.6	2.7	2.0	2.5	2.6
Importance Rating	7.8	7.8	7.8	7.8	7.9	7.8	7.7	7.9	7.7
Importance Rate 8-10	64.8%	65.0%	65.1%	64.4%	67.2%	65.8%	63.2%	66.5%	61.4%
Bar \$ spend	\$28.60	\$28.73	\$28.65	\$29.01	\$28.64	\$29.07	\$27.48	\$28.25	\$29.30
Food \$ spend	\$37.49	\$35.98	\$36.11	\$35.48	\$35.53	\$32.27	\$39.56	\$35.79	\$36.76
% who play machines	48.3%	46.2%	46.2%	46.6%	46.4%	67.6%	48.1%	44.1%	56.5%
\$ Poker machine spend	\$104.52	\$104.80	\$98.00	\$130.31	\$94.76	\$128.46	\$86.74	\$90.22	\$133.10
Good Gamers %	14.3%	13.7%	12.8%	16.9%	12.4%	25.4%	11.3%	11.1%	20.9%

Summary ratings your clubs vs benchmark



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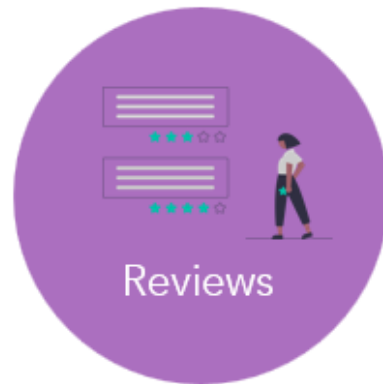
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*Artificial
Intelligence
Research
Solution for
Clubs*



Organizations have access to virtually unlimited digital consumer conversations.

Consumer empathy has become the mission for modern insights and CX teams.



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Deriving insights from open-ended text is **insanely frustrating**

You are mostly choosing between

Surface level
automation



Manual
hand-coding



Cherry-picking
quotes



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*Partnership with
leading US AI
research specialist*

*Be an early mover in
this new technology*

*Transform large
volumes of open
ended text into
actionable insights*

*Wohlsen Consulting AI
Research Solution for
Clubs*

*Key Themes
Emotional Sentiments
Tracking over time*

*Learn about how
leading-edge AI can
be applied to your
club*

*Activate a key
initiative in your
digital strategy pillar*



Our new AI qualitative research solution

Key Benefits for Clubs

- *We can now efficiently quantify your qualitative data*
- *Deepen your member or staff insights and understanding*
- *Identify and rank key themes*
- *Identify positivity and negativity measures*
- *Gauge sentiment across 42 emotions*
- *Option to track key themes and emotional sentiment over time*
- *Can be easily integrated into the highly successful CMAA Wohlsen Consulting member survey with industry benchmarking*
- *Cost effective and fast solution*

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Research Solution Options

*1. Integrated with CMAA
Member survey*

*2. Stand Alone
AI Survey*

*Add additional open-ended
questions to existing online
member survey*

*Pure-open ended survey focusing
on open ended questions only*

*Key consideration is to how to encourage members to spend more time
answering questions e.g. pre-promote the survey, recruit engaged members
or offer greater reward or prizes for completion*



Potential Research Questions

- *What do you like about the club*
- *What needs to improve*
- *What are your suggestions for service*
- *What are your suggestions for food*
- *What are your suggestions for the bar*
- *What are your suggestions for gaming*
- *What are your suggestions for entertainment*
- *What are your suggestions for promotions*
- *What is important to you when you go out to a club or hotel*
- *What do you like about other clubs and hotels that we might also provide*
- *Could you describe your ideal club outing*
- *What new facilities would you like to see at the club*
- *Here are some ideas we have – please comment on each*
- *Why did you rate the club in the ratings questions*

Using AI, automatically capture themes and topics to quickly understand the voice of the customer

canvs

What do you like most about our club?

Like most about our Club ▾

Quick Compare ▾

Share

🔍 Search and filter Open Ends

Summary **Topics** Emotions Cross Tabs



1.	Friendly	222 (22.9%)
2.	Food	160 (16.5%)
3.	Staff	133 (13.7%)
4.	Restaurant	97 (10.0%)
5.	Service	86 (8.9%)
6.	Atmosphere	73 (7.5%)
7.	Club	60 (6.2%)
8.	Meal	60 (6.2%)

969 Open Ends

Export

🔍 Search Here

Emotions ▾ Topics ▾ Codes ▾ Favorites ▾

Friendly patrons

61 to 75 years Year Old Male

🔍 A service / friendly service 🔍 friendly patron

Staff/food/atmosphere

61 to 75 years Year Old Male

🔍 A food / mentions food 🔍 A service / mentions staff

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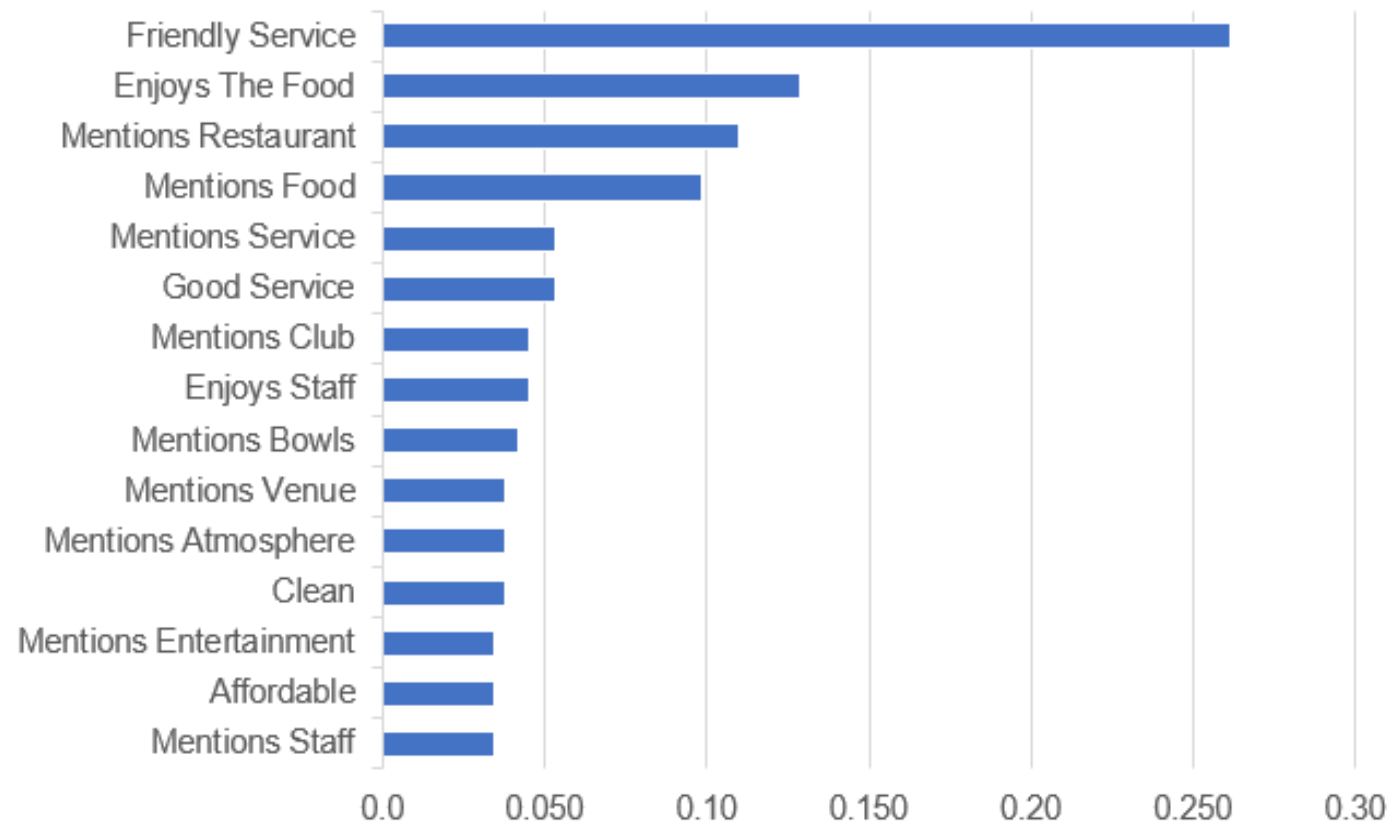
WOHLSEN
—CONSULTING—

CMA NATIONAL RESEARCH PARTNER

Filter and Tell Stories By Segment

Like most about our Club: Top 15 Codes

Search and Filters: *Frequency Of Visit / A few times a month (2 - 3 times)*

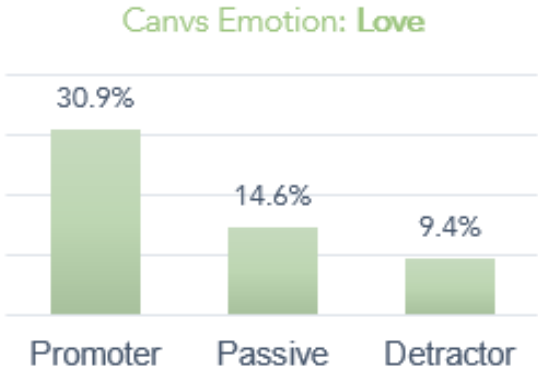
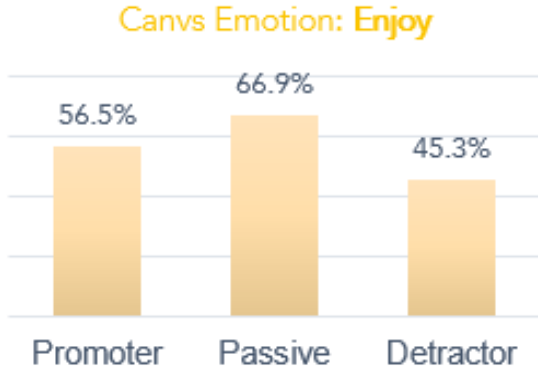
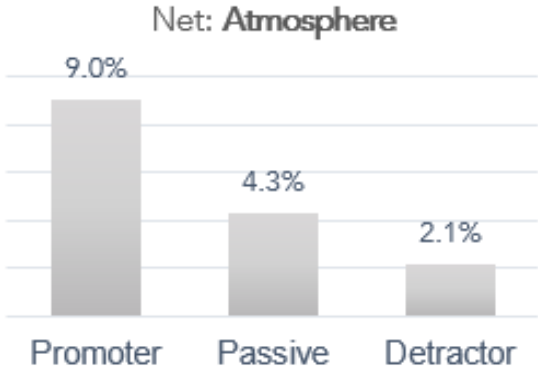
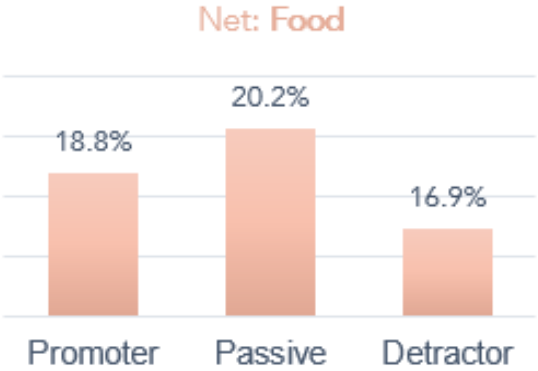
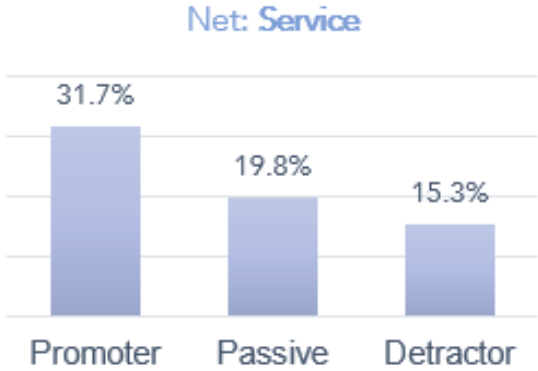


Overview

The open-end responses indicate that people appreciate the friendly atmosphere, staff, and patrons at the venue. They also enjoy the restaurant and its food, the bowling greens, and the convenience of services like the courtesy bus. Other positive aspects mentioned include the entertainment, cleanliness, and location of the venue.



Compare Key Metrics Across Groups
Likely to Recommend:
Drivers of Conversation

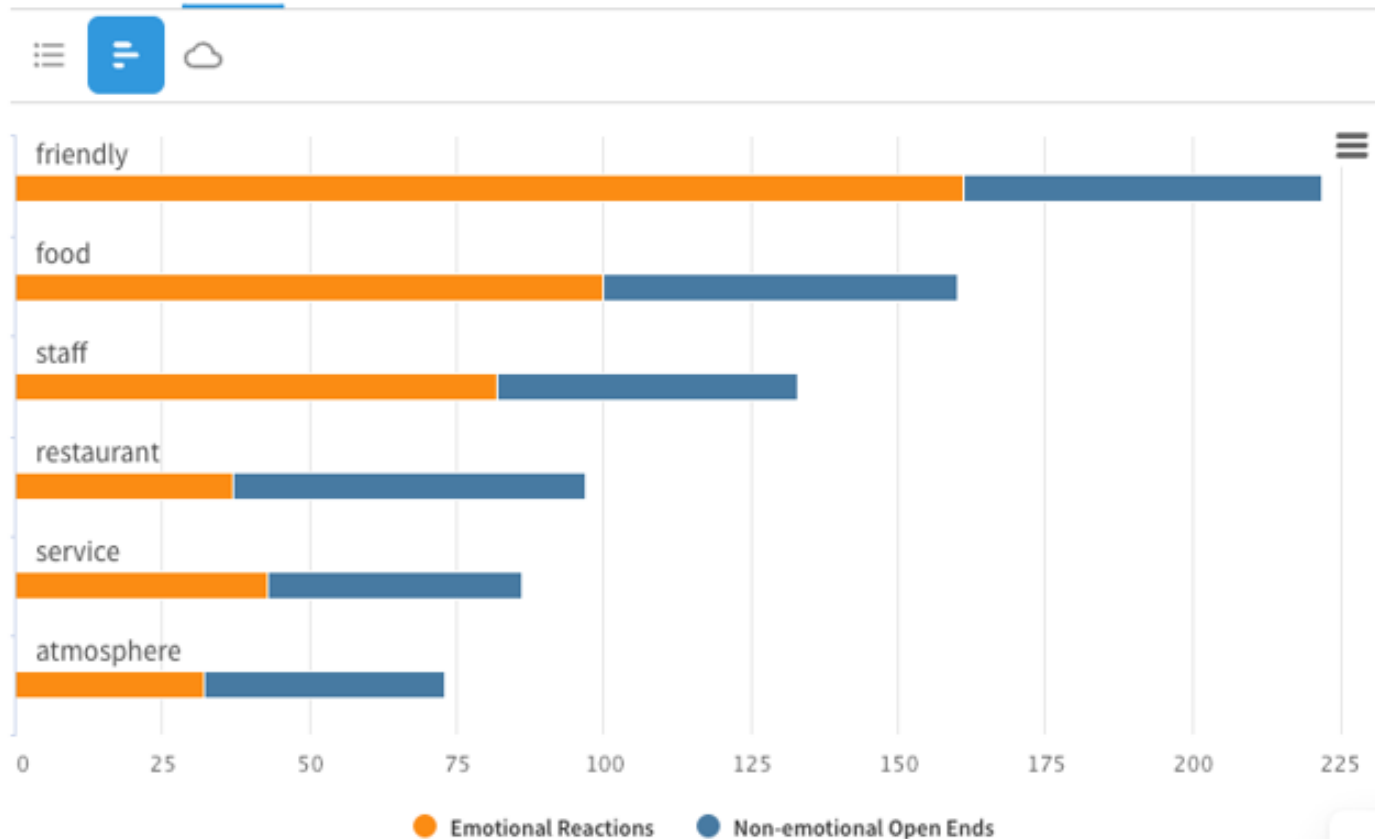


Promoter= Score 9-10
Passive=Score 7-8
Detractor= Score 1-6

Measure Emotion: Propriety Patented 42 Emotional Framework

"Bar staff are wonderful."

from 46-60 year old Female expressing Canvs emotion of Enjoy



1.	Enjoy	305 (67.9%)
2.	Love	122 (27.2%)
3.	Dislike	7 (1.6%)
4.	Dislike/enjoy	4 (0.9%)
5.	Happy	4 (0.9%)
6.	Beautiful	2 (0.4%)
7.	Enjoy/unsure	2 (0.4%)
8.	Indifferent	1 (0.2%)
9.	Supportive	1 (0.2%)
10.	Unsure	1 (0.2%)

Artificial Intelligence Introduction Webinar to be planned via CMAA

*We are seeking 10 clubs to join the first round of
this new research project*



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Win a free member survey worth \$3,500 today

And the winner is.....



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Thank you

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