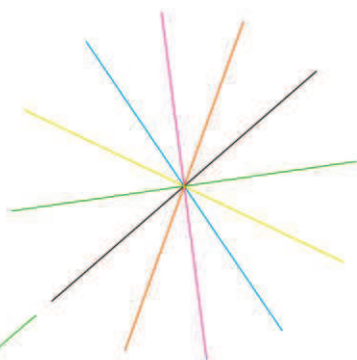


Gambling Harm-Minimisation Signage

Final Research Report

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CONTENTS

1. EXECUTIVE SUMMARY	4
1.1 Project background	4
1.2 Research methodology	4
1.3 The context: gamblers and the gambling environment	4
1.4 Performance of the current signage	5
1.5 The venue management perspective	7
1.6 Future opportunities for harm-minimisation signage	8
2. PROJECT BACKGROUND	9
2.1 Overview	9
2.2 Harm-minimisation signage	10
2.3 Need for research	11
3. RESEARCH OBJECTIVES	12
4. RESEARCH METHODOLOGY	13
4.1 Overview	13
4.2 Approach to gambler interviews	13
4.3 Gambler interview sample	13
4.4 Considerations informing the gambler sample	14
4.5 Approach to staff/manager interviews	15
4.6 Staff/manager sample	16
4.7 Considerations informing the staff/manager sample	16
4.8 Approach to quantitative survey	16
5. THE CONTEXT: GAMBLERS AND THE GAMBLING ENVIRONMENT	17
5.1 Distinctions between gambler types	17
5.2 Characteristics of habitual gamblers	18
5.3 Gambling superstitions	19
5.4 'Niggles' about gambling behaviour	19
5.5 Distinct gambling environments	20
5.6 Gambler responses to gambling environments	20
6. PERFORMANCE OF THE CURRENT SIGNAGE	21
6.1 Materials evaluated	21
6.2 The 'cut through' of materials	21
6.3 The design of the materials	24

6.4	Message take-out from materials	27
6.5	Tone of the materials	29
6.6	Contact cards and brochures	29
6.7	Claimed impact of the materials	30
7.	THE VENUE MANAGEMENT PERSPECTIVE	35
7.1	Perceptions of harm-minimisation efforts overall	35
7.2	The reality of harm-minimisation	35
7.3	Compliance with legislation	35
7.4	Venue perceptions of the harm-minimisation materials	36
7.5	Venue responses to a potentially changed harm-minimisation regime	36
8.	FUTURE OPPORTUNITIES FOR HARM-MINIMISATION SIGNAGE	37
8.1	Key audiences for harm-minimisation messages	37
8.2	Overall openness to harm-minimisation materials	37
8.3	The optimal style for harm-minimisation messages	37
8.4	Pop-up messages built into gaming machines	37
8.5	More regularly refreshed materials	38
8.6	Dynamic messages on screens in venues	38
8.7	Messages in restrooms	39
8.8	Learning from materials used in other jurisdictions	39
8.9	Learning from ClubSafe materials	41
9.	KEY FINDINGS	43
10.	APPENDIX	44
10.1	Gambler discussion guide (consumers)	44
10.2	Staff/manager discussion guide	47
10.3	Quantitative survey	50

1. EXECUTIVE SUMMARY

1.1 Project background

Liquor and Gaming NSW (L&GNSW) is responsible for the regulation of liquor, wagering, gaming and registered clubs in NSW. In NSW, the Gaming Machines Regulation 2010 and Casino Control Regulation 2009 mandate the types of gambling signs which need to be displayed in registered clubs and hotels with gambling areas, and in the casino. The legislation mandates specifications as to how and where this gambling signage needs to be displayed.

While the presence of materials such as these is one thing, it is critical that they are visible and stand out within an environment that can often be cluttered; that they connect with consumers; and that they work to deliver their intended message.

L&GNSW identified a need to explore the awareness and effectiveness of harm-minimisation messaging in venues. This need was identified given that current signs and messages are around ten years old, and that they exist within a relatively cluttered and competitive environment.

Research was required to review current signage among gamblers and stakeholders to explore awareness of these messages and gambler attitudes, intentions and behaviour in response to these communication materials. The research also considered any issues relating to gambling harm-minimisation signage from a venue management perspective.

1.2 Research methodology

The research included the following elements: 40 x 45 minute in-situ interviews with gamblers; 12 x 45 minute individual interviews with staff/managers; and a 6-10 minute online survey with n=200 NSW gamblers.

All qualitative interviews were conducted at gambling venues. These were pre-selected by L&GNSW, in consultation with Clubs NSW and the Australian Hotels Association. Each venue agreed to host the research and was fully briefed about the study prior to its commencement.

The qualitative sample included a mix of different gambler types – recreational, low-risk, moderate-risk and problem gamblers, using the widely used Problem Gambling Severity Index (PGSI), a mix of gamblers of different ages and gender, as well as those who gamble in different venues (hotels, clubs and the casino). Fieldwork was conducted between 11th October and 24th October 2017.

The online survey included a total of n=201 online interviews. The questionnaire length was up to five minutes. All fieldwork was conducted between 27th October and 1st November 2017.

1.3 The context: gamblers and the gambling environment

Distinctions between gambler types

The research identified clear distinctions between the different gambler types when it comes to their attitudes and behaviours. Recreational gamblers tend to engage with gambling in a highly casual and incidental way. Low-risk gamblers tend to exhibit a slightly greater interest in gambling and are more likely to claim to have an interest in gambling that goes beyond a casual basis. Moderate-risk gamblers often enjoy gambling and claim to be quite excited by the prospect of it – many talk about their key motivator being the possibility of a win. Problem gamblers appear to exist on a relatively broad spectrum: some are clearly in a state of denial about their gambling and are able to identify others who are far worse than them and 'have a problem'; others readily admit to losing jobs, homes and families and accept their relationship with gambling.

Characteristics of habitual gamblers

The research identified a range of characteristics about habitual gamblers – defined in this instance as those who are determined to be moderate risk and above according to the PGSI. Two standout characteristics are that these gamblers often appreciate the escapism that it offers, and are highly familiar with the gambling environments they choose to patronise.

Gambling superstitions

It is very clear that some gamblers can be highly superstitious when it comes to the likelihood that they will win – particularly on poker machines. Many believe that poker machines pay ‘in order’, while others have superstitions relating to particular ‘lucky’ machines.

‘Niggles’ about gambling behaviour

More frequent gamblers often have some slight concerns about their gambling behaviour. These ‘niggles’ are not always present at the front of people’s minds, but it is clear that they are lurking in the background, and become conscious concerns at particular moments in time. These concerns can include chasing losses, exceeding self-imposed limits on gambling, a loss of ‘fun’ associated with gambling, gambling alone, and reflecting on what else they could have spent money on instead of gambling.

Gambling environments

For the vast majority of gamblers, it is clear that gambling environments offer a feeling of sensory overload. This sense is driven by a wide range of factors which include: a relatively poorly-lit environment; a multitude of flashing lights on machines; LED screens announcing jackpots and other promotions; machines that are relatively noisy in isolation, becoming a cacophony when there are many machines in one area; an absence of free space; and in the TAB areas, a number of televisions showing different races, and race odds.

As a result, gamblers often respond viscerally to these environments. From a behavioural perspective, it is clear that the response gamblers have to these environments when they enter is entirely single-minded – they are simply highly engaged by the machines or the TAB, to the point where their openness to messages such as those delivered by signage is virtually non-existent.

1.4 Performance of the current signage

The research explored the full suite of current mandated gambling harm-minimisation materials, including posters, gaming machine stickers, contact cards and brochures.

‘Cut-through’ of materials

Universally, the full suite of materials appear to be almost entirely unable to ‘cut through’ the noise and get the attention of gamblers. Across 40 qualitative interviews, not a single participant came anywhere close to spontaneously identifying the signage as something that stands out for them in the gambling environment.

Even when prompted to find it, many have difficulties locating the signage and very few seem able to identify the entire suite of materials. Quantitatively, prompted recognition of the signage is low - roughly one in three gamblers claim to have not seen any of the signage before. It appears that the materials are recessive within the gambling environment, irrespective of their placement.

Design of materials

The design of the materials themselves is widely felt to hinder cut through. Many are quick to spontaneously identify that the materials are relative mono-tonal in nature. Few participants

believe that these colours have potential to stand out, even in a relatively plain environment. Additionally, many gamblers claim to find the text difficult to process across the materials.

Message take-out

The spontaneous message take-out from the materials appears to be 'get help'. For the majority, this message is not felt to be remotely relevant, simply because they are able to very quickly reject the proposition that they have a problem which requires them to get help.

The majority of gamblers see the messages as being quite rational. The Think! device is felt to naturally ask people to go to quite a rational place, as it is about thinking rather than feeling or intuiting. Additionally, messages about choices, limits, tomorrow, and getting help are only felt to apply to those who believe they already have a problem.

Perceived relevance of messages

Low and moderate risk gamblers tend to believe that there are plenty of people who do have genuine problems, that these messages would apply to – but there is nothing in these messages that prompts them to consider whether they personally should think about their gambling behaviour.

Of all the specific materials contained across the suite of materials, messages about enjoyment and family tend to be the most powerful, while messages about jackpots may be counterproductive for some. The message 'gambling more, enjoying it less' included on the gambling counselling sign is often felt to be particularly strong. Equally, the message 'Think about your family' is widely identified as one of the most powerful messages across the entire suite of materials.

Tone of the materials

For many, the tone used in the materials can feel overly strident. The capital letters used across the materials can feel a little 'shouty', particularly in a cultural context where text messaging has become increasingly prevalent, and where capitals are widely acknowledged to signify shouting. Additionally, the Think! device can be perceived by some gamblers as a little judgemental. This group interpret the device as a command, and liken it to someone telling them not to be stupid.

Contact cards and brochures

It seems that the idea of contact cards is quite appreciated, although the content as it stands can be quite off-putting. The idea is almost universally applauded – given their pocket size, the cards are felt to be discreet and easy to pick up. Additionally, the inclusion of contact details for help services is widely felt to be quite important. Ultimately, the brochures are felt to have very useful content, but to be overly dense and highly unlikely to be picked up in the first place.

Claimed impact of the materials

It appears that problem gamblers are the group most likely to believe that the materials overall are relevant and guilt-inducing. However, this group are also significantly more likely to claim that they find the signage confusing, and less likely to believe that the signs are credible or deliver an important message.

In response to seeing the signage, the biggest response that gamblers claim to have is to think about setting a limit on how much they gamble. When these responses are broken down by gambler type, it becomes clear that the signs are significantly more likely to have an impact among the problem gambler cohort than among recreational gamblers.

1.5 The venue management perspective

Perceptions of harm-minimisation efforts

Venues claim to have a clear interest in harm-minimisation when it comes to their patrons. The majority of those interviewed as part of this research are quick to indicate that preventing harm from problem gambling is simply the right thing to do. Central to this belief is a sense of having a duty of care to their patrons. However ultimately there is a widely acknowledged commercial tension at play. Gambling is a core part of the business for many of these venues, and in some cases the financial viability of the organisation depends entirely on the success of gambling operations. Venues have a natural desire to maximise their profits – either because of commercial considerations, or because there is a perceived need to put resources back into communities.

The reality of harm-minimisation

It seems that in reality, this tension is managed by venues by ensuring that they follow the law, and help those who are genuinely in trouble. All venues that took part in the research clearly meet their legislative requirements, and take doing so very seriously – most are quick to identify that the risks of not doing so are simply too great for their businesses. Equally, it is clear that venues have in place arrangements to ensure that patrons who are genuinely in trouble with their gambling receive assistance from the venue.

However, outside of meeting the legislative requirements and helping those in clear and obvious trouble, it is clear that venues do little else to minimise the harm to their patrons from gambling. In particular, it seems that moderate risk gamblers tend to receive very little attention from patrons.

Compliance with legislation

Almost universally, venues indicate that complying with the current legislation can feel quite onerous. Most venues claim that it is a twice-daily task to ensure full compliance, and that this takes a considerable number of staff hours to achieve. Many venue managers report a sense of anxiety about compliance, although ultimately, most see that compliance is a fact of life and that the costs associated with maintaining compliance as a simple cost of doing business.

Venue perceptions of the harm-minimisation materials

Ultimately, most venues – both management and staff – see the current suite of harm-minimisation signage as being fairly pointless. Venue staff are very quick to echo the sentiments of gamblers when it comes to the current materials simply acting as wallpaper that does not cut through in the busy environments. The majority also indicate that they rarely need to re-order materials such as brochures, simply because nobody ever takes one away.

Venue responses to a potentially changed harm-minimisation regime

Overall, it appears that venues are wary at the notion of a changed regime. A majority see enormous potential for an update to be a costly and time-consuming enterprise for their organisation. In this context, many harbour concerns about the likely impact of any new materials. Given that the current suite is widely considered to be 'wallpaper', many believe that the costs associated with a revamp may yield a negligible benefit and therefore be a waste of time and money. When it comes to a new approach to harm-minimisation, many venues spontaneously request an approach that tackles the issue slightly differently, ideally to the point where the materials are more likely to stand out for a longer period of time, rather than becoming 'wallpaper' as many believe the current suite of materials does.

1.6 Future opportunities for harm-minimisation signage

Key audiences for harm-minimisation messages

Based on the research findings, it appears that harm-minimisation messages offer the strongest opportunity for those in the 'middle ground' – that is, low and medium risk gamblers. This group often do have niggles about their gambling behaviour and are open to having these concerns reinforced by messages. Recreational gamblers seem likely to largely dismiss harm-minimisation messages as entirely irrelevant to their personal circumstances, while problem gamblers exhibit highly entrenched behaviours that are unlikely to be changed by harm-minimisation strategies.

Openness to harm-minimisation messages

Overall, it seems that gamblers are not entirely closed to the idea of harm-minimisation materials. At present, most simply do not see them as being personally relevant, because they are felt to be designed for people who 'have a gambling problem'.

The optimal style for harm-minimisation messages

It seems that harm-minimisation messages could be more personally engaging than they are currently, in order to have a greater impact. It is likely that messages and materials which 'hold up a mirror' to gamblers and reflect their niggles could help materials to feel more relevant.

Given that most gamblers simply self-exclude from current messages, it seems clear that materials must work harder to convince gamblers the messages are directed at them personally, and not at other people who 'really do have a problem'.

Pop-up messages built into gambling machines

Gamblers appear to be relatively united in the belief that these could have significant potential to disrupt the flow of a gambling session, and a significant proportion claim to like the idea in theory. In reality, many gamblers acknowledge that a pop-up message could be highly irritating as they seek to engage in their pursuit of gambling. Many are quick to point out that if the message can be dismissed with the click of a button, then this extra click will quickly become second nature.

Venues are universally sceptical about the idea of pop-up messages. The most significant concern relates to the retro-fitting of existing machines. Venues also have concerns about their ability to source gaming machines that are manufactured in jurisdictions outside of NSW.

More regularly refreshed materials

The research findings are very clear that a more regularly refreshed suite of materials could help to drive cut through and impact. Wear-out is clearly at play in this instance. As a result, a more regularly refreshed suite of material has potential to maintain cut through and relevance.

Dynamic messages on screens in venues

Some gamblers spontaneously suggest the use of dynamic harm-minimisation messages to be put on screens around gambling venues. Many see this as an opportunity to deliver harm-minimisation messages in a more engaging way that is less likely to become wallpaper.

Messages in rest rooms

Gamblers are also quick to identify that toilets present a unique opportunity to deliver harm-minimisation messages. Visiting the toilet is felt to be a key moment where people actually take a break and disconnect from the environment around them. This break often provides time and an opportunity for reflection, particularly when people might have niggles about their current gambling behaviour.

2. PROJECT BACKGROUND

2.1 Overview

Liquor and Gaming NSW (L&GNSW) is responsible for the regulation of liquor, wagering, gaming and registered clubs in NSW. The agency sits within the NSW Department of Industry, and its responsibilities include compliance, enforcement and licensing functions, as well as the provision of policy advice, program evaluation and executive support to the NSW Government. L&GNSW discharges its functions according to a set of principles which include a commitment to risk-based mitigation and harm-minimisation principles.

Gambling is a common recreational pursuit, and an enjoyable one for many. In 2012, L&GNSW published research about the prevalence of gambling and problem gambling in NSW¹. This research showed that 65% of the NSW adult population had participated in at least one gambling activity in the previous 12 months. The most popular gambling activities were lottery products (41%), instant scratch tickets (28%), pokies/gaming machines (27%), horse/greyhound races (24%), Keno (14%), sports betting (8%) and table games in a casino (7%). The prevalence of participation in many of the gambling activities peaks among the youngest age group (18-25 year olds), and then steadily declines with increasing age.

The majority of people gamble with enjoyment and without harm, and many gambling forms are benign. However, there is potential for significant harm from some types of gambling, including lowered work productivity, depression, relationship breakdown, job loss, bankruptcy, crime and in some cases suicide².

Problems relating to electronic gaming machines are typically the most common issue for those presenting for treatment - although given the rise in online wagering, there are concerns about its potential future impact. The term 'problem gambling' is used in Australia to describe harms associated with difficulties in limiting time or money spent on gambling, and is intended to encompass a continuum of severity³.

The Problem Gambling Severity Index (PGSI) is a widely used nine item scale for measuring at risk behaviour in problem gambling within the general population, which closely resembles the DSM diagnostic criteria. It is the most commonly used measurement tool for population level research into problem gambling prevalence in Australia. Adults self-assess their gambling behaviour over the past 12 months by answering a range of behavioural and attitudinal questions resulting in a single score. The 2012 NSW prevalence study classified 0.8% of NSW adults as problem gamblers (defined by a PGSI score of 8 or higher), 2.9% as moderate risk gamblers (a PGSI score of 3-7) and 8.4% as low risk gamblers (a PGSI score of 1-2).

There is considerable stigma in Australia when it comes to problem gambling⁴. The general public tend to view problem gambling as a condition resulting from the characteristics of an individual's personality or circumstance – but one that is recoverable. However, people with an identified gambling problem often feel that others see their condition as their own fault due to failures of character. They often also report significant self-stigma, including feeling disappointed with themselves, ashamed and embarrassed. Critically, stigma can be an obstacle to help seeking and behaviour change.

¹ *Ogilvy Illumination. 2012. Prevalence of Gambling and Problem Gambling in NSW. Research commissioned for NSW Office of Liquor Gambling and Racing.*

² *Productivity Commission. 2010. Gambling: Productivity Commission Enquiry Report Volume 1*

³ *Rodda, S., Lubman, D. & Latage, K. Problem Gambling: Aetiology, identification and management. Australian Family Physician, September 2012, Vol:41, No: 9 pp 725-729 [Full Text](#)*

⁴ *Hing, N., Russell, A., Nuske, E., Gainsbury, S. (2015). The stigma of problem gambling: Causes, characteristics and consequences. Victoria, Australia, Victorian Responsible Gambling Foundation.*

2.2 Harm-minimisation signage

Warning messages and material about gambling within venues are an important component of a harm-minimisation strategy. Warnings can inform individuals of the potential risks of gambling, and encourage safer gambling practices. They can also inform people about where to get help. In NSW, the Gaming Machines Regulation 2010 and Casino Control Regulation 2009 mandate the types of gambling signs which need to be displayed in registered clubs and hotels with gambling areas, and in the casino. The legislation mandates specifications as to how and where this gambling signage needs to be displayed.

The mandatory gambling harm-minimisation signage and related communication materials present a range of messages on a continuum that ranges from prevention and early intervention targeted toward recreational to low/moderate risk, to messages which provide information on NSW Government funded gambling help services. A range of materials were developed approximately ten years ago, which are currently required to be displayed in registered clubs, hotels and the Star casino. These include:

- > gambling counselling sign;
- > chance of winning sign;
- > contact cards for mandatory self-exclusion schemes;
- > stickers for electronic gaming machines;
- > ATM and cash-back terminal signage; and
- > player information brochures about gaming machines, lotteries/Keno, and casino games.

These harm-minimisation strategies are ultimately targeted at recreational gamblers (non-problem gamblers), and are intended to reduce the incidence of problem gambling by facilitating responsible gambling behaviour. As such, the materials are intended as a preventative rather than a tertiary strategy and are not expected to address the serious difficulties faced by problem gamblers who have significantly entrenched irrational beliefs and associated disruptive behaviours that require a more intensive set of treatment interventions.

While the presence of materials such as these is one thing, it is critical that they are visible and stand out within an environment that can often be cluttered; that they connect with consumers; and that they work to deliver their intended message. There are a range of factors which can influence the extent to which this occurs. These are briefly examined below.

Placement of materials clearly matters. While materials placed directly in gambling areas are likely to have a role to play, materials placed in other areas of hotels, clubs and the casino where patrons take a break from gambling (bars, dining areas and restrooms) potentially play a significant role given that people may be more receptive to information and more likely to reassess their gambling situation. Placement is likely to be especially important for materials such as contact cards – given the social stigma associated with having a problem with gambling, it is reasonable to assume that patrons would be more likely to pick materials up in areas of relative privacy, such as bathrooms⁵.

With all communications, there comes a time when materials decrease in their effectiveness due to familiarity. Given that all hotels, clubs and the casino are required to display the same messages, and that these have been in existence for around ten years, potential exists for reduced effectiveness through creative wear-out and message fatigue.

⁵ AC Nielsen. 2005. Responsible Gambling Signage, Refreshed Signage. *Research Report for Qld Office of Gambling Regulation*. Cited in Productivity Commission Enquiry Report Volume 1, 2010.

The style and creative approach used for materials can help harm-minimisation materials cut through and generate a stronger personal connection with the intended audience. For example, research conducted in Victoria⁶ identified warnings that used imagery of distressed people was more likely to generate a strong response among at-risk gamblers than warnings which did not contain such imagery.

Previous research⁷ has also indicated that pop-up messaging on gaming machines may have potential to interrupt play and deliver harm-minimisation messaging. The simplest form of dynamic messaging could be a generic warning which does not take account of gamblers' playing styles. In time, dynamic messaging could be tailored to the style of play during a session, so that gamblers playing at a high intensity for prolonged periods, or whose behaviour is consistent with 'chasing losses' could receive a warning specific to their behaviour, while recreational gamblers could face less interruptions⁸.

2.3 Need for research

L&GNSW identified a need to explore the awareness and effectiveness of harm-minimisation messaging in gambling venues. This need was identified given that current signs and messages are around ten years old, and that they exist within a relatively cluttered and competitive environment.

Research was required to review current signage among gamblers and stakeholders to explore awareness of these messages and gambler attitudes, intentions and behaviour in response to these communication materials. The research also considered any issues relating to gambling harm-minimisation signage from a venue management perspective.

The research will help inform the refinement of existing signage and identify new and innovative ways of communicating these messages among the target audience within venues.

⁶ Sweeney Research. 2007. Gambling player information materials. *Research commissioned by the Department of Justice, Victoria. Cited in Productivity Commission Enquiry Report Volume 1, 2010.*

⁷ Edgerton, J. D., Biegun, J., Roberts, L.W. 2016. Player Behavioural Tracking and Personalized Feedback in On-line Gambling: Implications for Prevention and Treatment of Problem Gambling. *Journal of Addiction & Prevention, November 2016, Vol.:4, Issue: 2*

⁸ Productivity Commission. 2010. Gambling: Productivity Commission Enquiry Report Volume 1

3. RESEARCH OBJECTIVES

Within the broad objective of evaluating the current suite of gambling harm-minimisation communication materials, the specific objectives were to:

- > explore awareness and understanding of gambling harm-minimisation signage and messaging;
- > assess the clarity and understanding of messaging on signage;
- > assess the relevance of messaging for different gambling groups including recreational, low and moderate risk and problem gamblers;
- > explore intentions, attitude and behaviour change in response to this signage;
- > assess the relevance, appeal and effectiveness of the current suite of gambling harm-minimisation signage and identify any opportunity for improvement;
- > identify opportunities for new and innovative forms of effective signage and messaging; and
- > develop a set of signage guidelines which can guide the future development of messages for patrons of gambling venues.

4. RESEARCH METHODOLOGY

4.1 Overview

The research included the following elements:

- > 40 x 45 minute in-situ interviews with gamblers;
- > 12 x 45 minute individual interviews with staff/managers; and
- > a 6-10 minute online survey with n=200 NSW gamblers.

4.2 Approach to gambler interviews

All interviews were conducted at gambling venues. These venues were pre-selected by L&GNSW, in consultation with Clubs NSW and the Australian Hotels Association, to ensure adequate representation of different sized venues and metro and non-metro locations. Each venue agreed to host the research and was fully briefed about the study prior to its commencement. The interviews involved both observation and questioning. Participants took researchers on a ‘tour’ of the gambling area, briefed to provide a running commentary on everything they noticed. They were then prompted to look for harm-minimisation signage and provide feedback on it in the moment. Subsequently, researchers conducted a more detailed review of the signage using traditional interviewing techniques. The full discussion guide can be found in the Appendix.

All fieldwork was conducted between 11th October and 24th October 2017.

4.3 Gambler interview sample

The sample for gambler interviews was as follows:

I'View	Age	Gender	Gambler segment	Context	Location
1	18-24	M	Recreational	Casino	Sydney (mix)
2	18-24	F	Recreational	Club	Coastal
3	18-24	M	Low Risk	Club	Western Sydney
4	18-24	F	Low Risk	Hotel	Inland
5	18-24	M	Moderate Risk	Hotel	Coastal
6	18-24	F	Moderate Risk	Club	Western Sydney
7	18-24	M	Problem Gambler	Hotel	Western Sydney
8	18-24	F	Problem Gambler	Casino	Sydney (mix)
9	25-34	M	Recreational	Hotel	Inner Sydney
10	25-34	F	Recreational	Club	Central Coast
11	25-34	M	Low Risk	Club	Inner Sydney
12	25-34	F	Low Risk	Casino	Sydney (mix)
13	25-34	M	Moderate Risk	Casino	Sydney (mix)
14	25-34	F	Moderate Risk	Hotel	Wollongong

I'View	Age	Gender	Gambler segment	Context	Location
15	25-34	M	Problem Gambler	Club	Western Sydney
16	25-34	F	Problem Gambler	Casino	Sydney (mix)
17	35-44	M	Recreational	Hotel	Wollongong
18	35-44	F	Recreational	Club	Inner Sydney
19	35-44	M	Low Risk	Hotel	Western Sydney
20	35-44	F	Low Risk	Casino	Sydney (mix)
21	35-44	M	Moderate Risk	Club	Coastal
22	35-44	F	Moderate Risk	Hotel	Inner Sydney
23	35-44	M	Problem Gambler	Hotel	Coastal
24	35-44	F	Problem Gambler	Club	Coastal
25	45-54	M	Recreational	Casino	Sydney (mix)
26	45-54	F	Recreational	Hotel	Coastal
27	45-54	M	Low Risk	Club	Central Coast
28	45-54	F	Low Risk	Hotel	Inland
29	45-54	M	Moderate Risk	Club	Inner Sydney
30	45-54	F	Moderate Risk	Casino	Sydney (mix)
31	45-54	M	Problem Gambler	Hotel	Wollongong
32	45-54	F	Problem Gambler	Club	Inland
33	55-64	M	Recreational	Club	Inland
34	55-64	F	Recreational	Hotel	Western Sydney
35	55-64	M	Low Risk	Casino	Sydney (mix)
36	55-64	F	Low Risk	Club	Inland
37	55-64	M	Moderate Risk	Hotel	Inland
38	55-64	F	Moderate Risk	Club	Central Coast
39	55-64	M	Problem Gambler	Casino	Sydney (mix)
40	55-64	F	Problem Gambler	Hotel	Inner Sydney

4.4 Considerations informing the gambler sample

A number of considerations informed the development of the sample. These were:

Age

The sample was designed to cover a range of ages from 18 – 64 years. To ensure broadly even representation across the 40 gambler interviews, age bands were applied. The sample was

slightly skewed toward the younger end of the spectrum given that gambling overall is slightly more prevalent among younger age groups.

Gender

The sample was evenly split according to gender.

Risk level (segment)

The sample was designed to ensure coverage of the different gambling classifications according to the PGSI. All participants had gambled at least three times in the previous 12 months. The PGSI was administered as part of the recruitment screening process, and gamblers were categorised as follows:

- > Recreational – PGSI score of 0
- > Low Risk – PGSI score of 1-2
- > Moderate Risk – PGSI score of 3-7
- > Problem Gambler – PGSI score of 8 or more

Type of gambling

The research included those who use different types of gambling – particularly gaming machines and totalizator betting. Across the sample, 30 participants claimed to prefer gaming machines, while 10 participants claimed to prefer totalizator betting.

Gambling context

The sample was developed to include those who gamble in a range of different locations. During recruitment, participants were asked to identify the context in which they primarily gamble (either hotels, clubs or the casino).

As part of this recruitment process, participants were also asked about the size of the venue (e.g. a large club vs a small community club). The sample included a mix of different sized venues across the sample for both the hotel and club context.

Participants from a range of cultural backgrounds

The research included people from a range of different cultural backgrounds. Recruiters were briefed to ensure a broadly representative mix of cultural background across the entire sample.

4.5 Approach to staff/manager interviews

Staff and manager interviews were also conducted in-situ – that is, participants worked at the venues in which the research was conducted. When researchers arrived at venues, staff were usually interviewed first so as to give the research team an understanding of the venue. Each interview included a deep exploration of the venue and the role that gambling plays within it. It also included an evaluation of the efficacy of the signage from the perspective of the venue, when it comes to their patrons. Finally, staff and managers also provided highly detailed feedback from a venue management perspective. The discussion guide can be found in the Appendix.

4.6 Staff/manager sample

The sample for staff/managers was as follows:

I'view	Position	Context	Location
1	Manager	Hotel	Inland
2	Manager	Hotel	Western Sydney
3	Staff	Hotel	Coastal
4	Staff	Hotel	Inner Sydney
5	Manager	Club	Inner Sydney
6	Manager	Club	Coastal
7	Staff	Club	Western Sydney
8	Staff	Club	Inland
9	Manager	Casino	Inner Sydney
10	Staff	Casino	Inner Sydney
11	Manager	Casino	Inner Sydney
12	Staff	Casino	Inner Sydney

4.7 Considerations informing the staff/manager sample

Recruitment

Participants were identified by the venues themselves, after receiving a brief from the research team about the type of positions that were required.

4.8 Approach to quantitative survey

The survey included a total of n=201 online interviews. The questionnaire length was up to five minutes and captured the attitudes and behaviours of gamblers, then moved on to focus on the harm-minimisation signage. Participants were prompted with the different in-venue signs and asked about recognition, impressions, message take-out and impact. The full questionnaire can be found in the Appendix.

All participants were aged 18+ years, and were residents of NSW who had gambled at least once in the past 12 months on a gaming machine, at a TAB outlet, or had played Keno. The sample was split across the four different types of gamblers according to their PGSI score:

- > n=50 recreational gamblers;
- > n=50 low risk gamblers;
- > n= 51 moderate risk gamblers; and
- > n= 50 problem gamblers.

All fieldwork was conducted between 27th October and 1st November 2017.

5. THE CONTEXT: GAMBLERS AND THE GAMBLING ENVIRONMENT

5.1 Distinctions between gambler types

The research was able to identify clear distinctions between the different gambler types when it comes to their gambling behaviours and attitudes toward gambling overall.

Recreational gamblers

This group tend to engage with gambling in a highly casual and incidental way. Often, gambling is something that is only done with friends as part of a social gathering – for example, at the end of a meal in a club. This group tend to see gambling as a source of light entertainment – few have any genuine expectation of winning, and claim to be quite happily entertained having gambled a relatively small amount. Critically, this group claim to be entirely in control of their gambling behaviour – they do not see themselves being at risk in any way.

Low risk gamblers

Compared to recreational gamblers, this group tend to exhibit a slightly greater interest in gambling. They are more likely to claim to have an interest in gambling that goes beyond a casual basis, although they generally believe they are in control of their gambling.

A key distinction between low risk gamblers and recreational gamblers appears to be that they occasionally catch a glimpse of something in their gambling behaviour that they do not necessarily like. For example, they might set a limit for how much they spend gambling, and exceed it. They can find themselves being somewhat overly excited by the prospect of winning, or being drawn too far into other people's behaviours who might be more engaged with gambling than they are themselves. These moments of recognition are not necessarily regular, but most of the low risk gamblers in our sample identify that they have experienced them at least once or twice in the past.

Moderate risk gamblers

This group often enjoy gambling, and claim to be quite excited by the prospect of it. Many talk about their key motivator being the possibility of a win. Many moderate risk gamblers begin a gambling session with a betting limit in mind, but openly acknowledge that they do not always stick to it. As part of this, moderate gamblers are able to identify that they can sometimes chase their losses by gambling for longer periods.

Critically, this group are able to identify moments where they have had regrets about their gambling. In some cases this sense of regret can come almost immediately after they finish a gambling session, particularly when they realise that they have gambled more than they wanted in the pursuit of a win.

Problem gamblers

Based on the sample, it appears that a broad spectrum of problem gamblers exists. There are some who are clearly in a state of denial about their behaviour and the impacts that it has on their lives – while they may have regrets about their gambling, they are always able to identify other people who are far worse than them, who definitely 'have a problem' with gambling.

At the other end of the spectrum, the research identified problem gamblers who readily admit to losing jobs, homes and families as a result of their gambling addictions. These problem gamblers tend to broadly accept their relationship with gambling and believe there is little that can be done to change it.

Figure 1 below illustrates the spread of problem gamblers in the community. It shows the distribution of PGSI scores across the quantitative sample – while there is a relatively even spread of PGSI scores among the problem gamblers, 15 per cent of the sample overall had a PGSI score of 11 or higher.

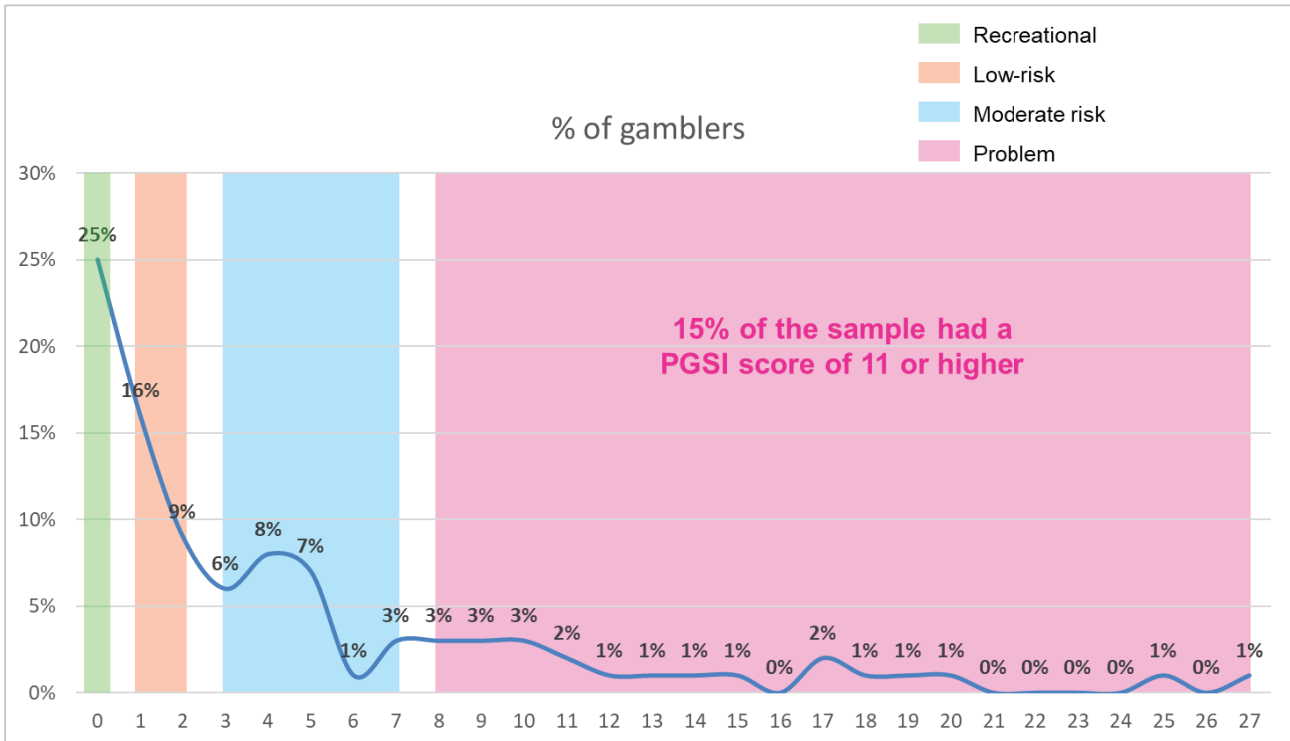


Figure 1: Distribution of PGSI scores among the quantitative sample

5.2 Characteristics of habitual gamblers

The research identified a range of characteristics about habitual gamblers – defined in this instance as those who are determined to be moderate risk and above according to the PGSI. Two standout characteristics are that these gamblers often appreciate the escapism that it offers, and are highly familiar with the gambling environments they choose to patronise.

Escapism

Many habitual gamblers claim to have either stressful or boring lives, and indicate that they appreciate the ability to get away from these. As part of this, many enjoy the ability to be by themselves and not engage with other people. Often, they say that they like to be away from the world – and in some cases even the daylight – when they play poker machines. Critically, these gamblers almost universally try to pick machines where they have some space and privacy away from other gamblers.

Familiarity with the gambling environment

For those at the higher end of the problem gambling spectrum, the gambling environment can be like a second home, where they spend a considerable amount of their free time. As a result, many appear to be highly attuned to changes within the space – for example, they are quick to identify when poker machines are moved around. Equally, there are clearly elements of the environment such as promotional material, and venue signage which simply blur into the background as people become more and more familiar with the space.

5.3 Gambling superstitions

It is very clear that some gamblers can be highly superstitious when it comes to the likelihood that they will win – particularly on poker machines. Many believe that poker machines pay ‘in order’, and as a result they claim to avoid a machine if they know that it has recently paid out to someone else. Some gamblers time their visits to gambling venues after events when they believe that more people are likely to have been through the venue and put money through the machines.

“I always go to the club in the evening after Melbourne Cup, because I reckon there’s a bigger chance of having a win”.

Another key superstition relates to specific machines. Some gamblers harbour a strong belief that particular machines are ‘lucky’ – usually those machines where they have had a big win in the past. Additionally, some believe that certain ‘types’ of machine are luckier than others. This is clearly reflected in the behaviour of gamblers when they initially enter the gaming venue – their attention tends to be exclusively focussed on finding the ‘right machine’.

“I always like to play Lucky 88, I always feel like I get the good wins on that”.

Interestingly, gamblers who harbour these types of superstitions often position themselves as experts on gambling to their close friends and family members. They claim to be willing to ‘share their secrets’ about how to maximise success on pokies/gaming machines with people who are close to them.

5.4 ‘Niggles’ about gambling behaviour

More frequent gamblers often have some slight concerns about their gambling behaviour. These ‘niggles’ are not always present at the front of people’s minds, but it is clear that they are lurking in the background, and become conscious concerns at particular moments in time. These niggles seem to be potential pain points for gamblers when it comes to their behaviour – when they identify these niggles, gamblers tend to feel uncomfortable about their behaviour and its broader ramifications. Critically, it appears that these niggles become most pronounced after a gambling session – very few claim to think about these issues during a session.

A key concern that gamblers identify can be when they catch themselves chasing losses. Usually, this is identified after they have gambled more than they had planned to, as a direct result of trying to ‘catch up’ on losses earlier in the gambling session.

Related to chasing losses, some gamblers can also have concerns about exceeding limits they have set themselves prior to a gambling session. This tends to be a result of chasing losses or a belief that ‘one more attempt’ will provide the win that gamblers are seeking.

For some gamblers, there can be a sense that gambling is less fun than it once was. This feeling is often prompted by a negative experience, for example a big loss or exceeding a personally set limit. In these moments, gamblers can reflect on their gambling experiences and identify that the fun and excitement has left, often having been replaced by a sense of grim determination.

Another key niggle for some gamblers can be gambling alone. This is particularly pronounced among gamblers who started gambling socially and recreationally, who have graduated into more frequent gambling alone. This can be an ongoing concern that hums along in the background for some gamblers.

The final niggle that the research consistently identified is when gamblers reflect on how else they could have spent their money and time instead of gambling. It seems that some gamblers walk away from a losing session frustrated with themselves, and reflecting that the money they have lost could have been spent on a gift for their children or grandchildren, for example. For those who

spend a lot of their free time gambling, there can also be moments when they reflect on other, more productive ways that they could pass the time.

5.5 Distinct gambling environments

It is clear from the research that different gambling environments are clearly distinct from one another, with each offering slightly different benefits for different gamblers.

The casino

The casino is frequently identified by gamblers as a venue that is unashamedly focused on gambling - most gamblers believe that the single purpose of the venue is clearly on display. As a result, gamblers who frequent the casino often claim to find the atmosphere intoxicating. Regular gamblers claim to be enticed by the sounds and sights of the casino, and some even indicate that the scent in the air is strongly connected with the excitement of gambling for them.

Clubs

Most gamblers believe that gambling, and poker machines in particular, are a fundamental part of the environment within a club. Most believe that clubs are fairly 'loud and proud' about the gambling facilities. A key part of this is a sense that there is no clearly discernible entry or exit to the gambling area – rather, it simply exists in the broader club's space.

Hotels

In contrast to clubs and the casino, it is clear that many gambling areas within hotels are fairly well-contained within the broader hotel space. Often, the gambling area is tucked away from the rest of the hotel, and in many cases gamblers identify that these are comparatively smaller than gambling areas found in clubs. A result of this segregation and relatively small size is that regular gamblers in hotels often know one another, at least by sight.

5.6 Gambler responses to gambling environments

For the vast majority of gamblers, it is clear that gambling environments offer a feeling of sensory overload. This sense is driven by a wide range of factors which include:

- > a relatively poorly-lit environment;
- > a multitude of flashing lights on machines;
- > LED screens announcing jackpots and other promotions;
- > machines that are relatively noisy in isolation, becoming a cacophony when there are many machines in one area;
- > an absence of free space; and
- > in the TAB areas, a number of televisions showing different races, and race odds.

As a result, gamblers often respond viscerally to these environments. The sights, sounds and smells can act as secondary cues which herald the excitement that gambling can offer – and for many people, these secondary cues create a genuine sense of enthusiasm about the prospect of winning.

From a behavioural perspective, it is clear that the response gamblers have to these environments when they enter is entirely single-minded – they are simply highly engaged by the machines or the TAB, to the point where their openness to messages such as those delivered by signage is virtually non-existent.

6. PERFORMANCE OF THE CURRENT SIGNAGE

6.1 Materials evaluated

The research explored the full suite of current mandated gambling harm-minimisation materials, including posters, gaming machine stickers, contact cards and brochures. These can be seen in the figure below.



Figure 2: Existing materials evaluated

6.2 The 'cut through' of materials

Overall

As described previously, the gambling environment tends to be highly cluttered and busy, with a wide range of elements competing for the attention of gamblers. Universally, the full suite of materials appear to be almost entirely unable to 'cut through' the noise and get the attention of gamblers.

In the qualitative element of the research, participants were observed in the gambling environment and asked to describe everything that drew their attention within it. Across 40 interviews, not a single participant came anywhere close to spontaneously identifying the signage as something that stands out for them in the gambling environment. Even when prompted to find it, many have difficulties locating the signage, and very few seem able to identify the entire suite of materials. Across the board, it appears that gamblers are far more interested in initially evaluating the gambling environment, and then becoming immersed in their gambling experience than they are in reviewing harm-minimisation signage.

When prompted, most claim to be vaguely aware of the signage, but claim not to ‘see it’ when they are in-situ. Qualitatively, the majority indicate that they have seen the signage at some point in the past. Additionally, most are also quick to identify that the signage is required by law to be visible within the gambling environment. However, it seems that the vast majority see the signage as ‘wallpaper’ in the venue, which simply does not warrant a second look. It is likely that the familiarity of the materials has contributed to creative wear-out among the target audience.

Quantitatively, prompted recognition of the signage - whereby the signs are shown to participants, and they are asked if they recognise it - is low. Roughly one in three gamblers claim to have not seen any of the signage before.

The figure below shows that recognition is highest among moderate risk gamblers. It also highlights that the gaming machine stickers are the least-recognised element of the harm-minimisation suite among recreational, low and moderate risk gamblers.

However, the figure also shows that self-exclusion cards and the chance of winning sign are significantly more likely to have been seen by moderate risk gamblers than by any other group. Additionally, gaming machine stickers are significantly more likely to have been seen by problem gamblers than recreational gamblers.

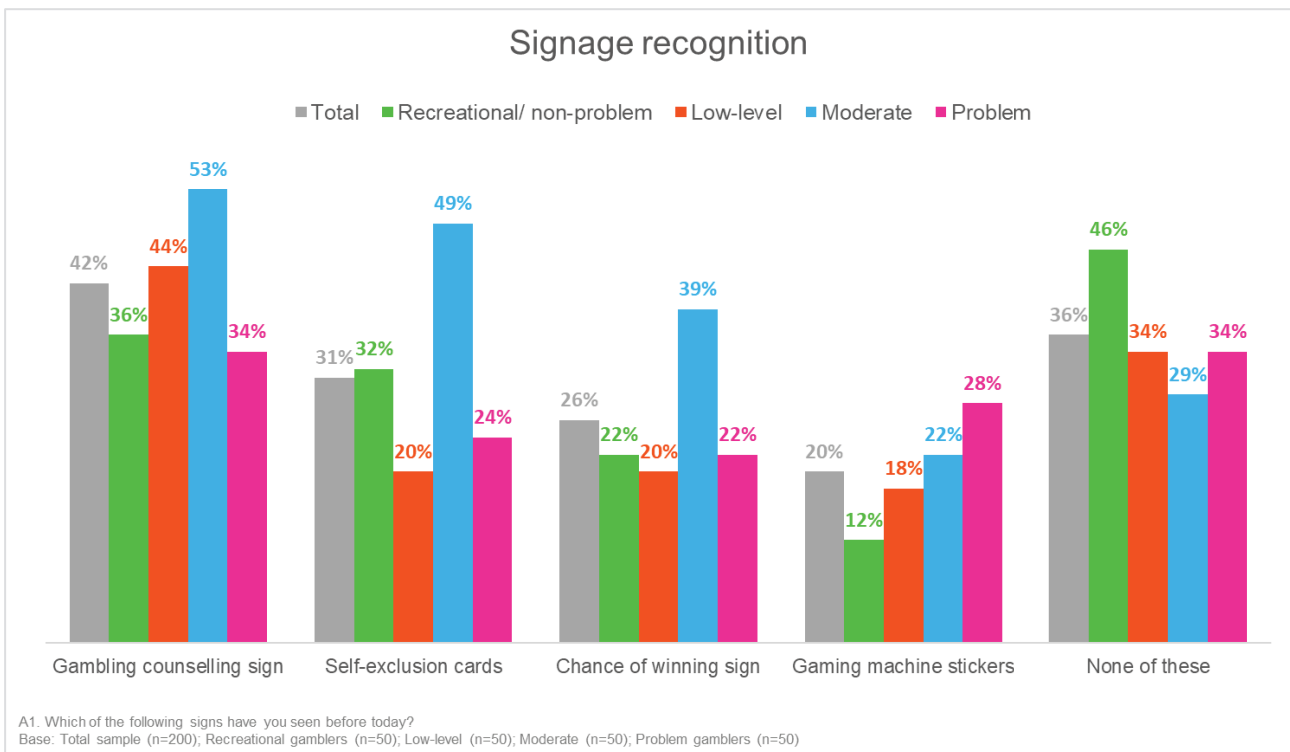


Figure 3: Claimed recognition of materials, by gambler type

Cut through by type of gambling

Claimed recognition of the signage increases in line with gamblers’ opportunities to see it in venues. The figure below shows that gamblers who have played gaming machines, Keno and TAB in the previous 12 months are most likely to have seen the signage, with prompted recognition at 79 per cent.

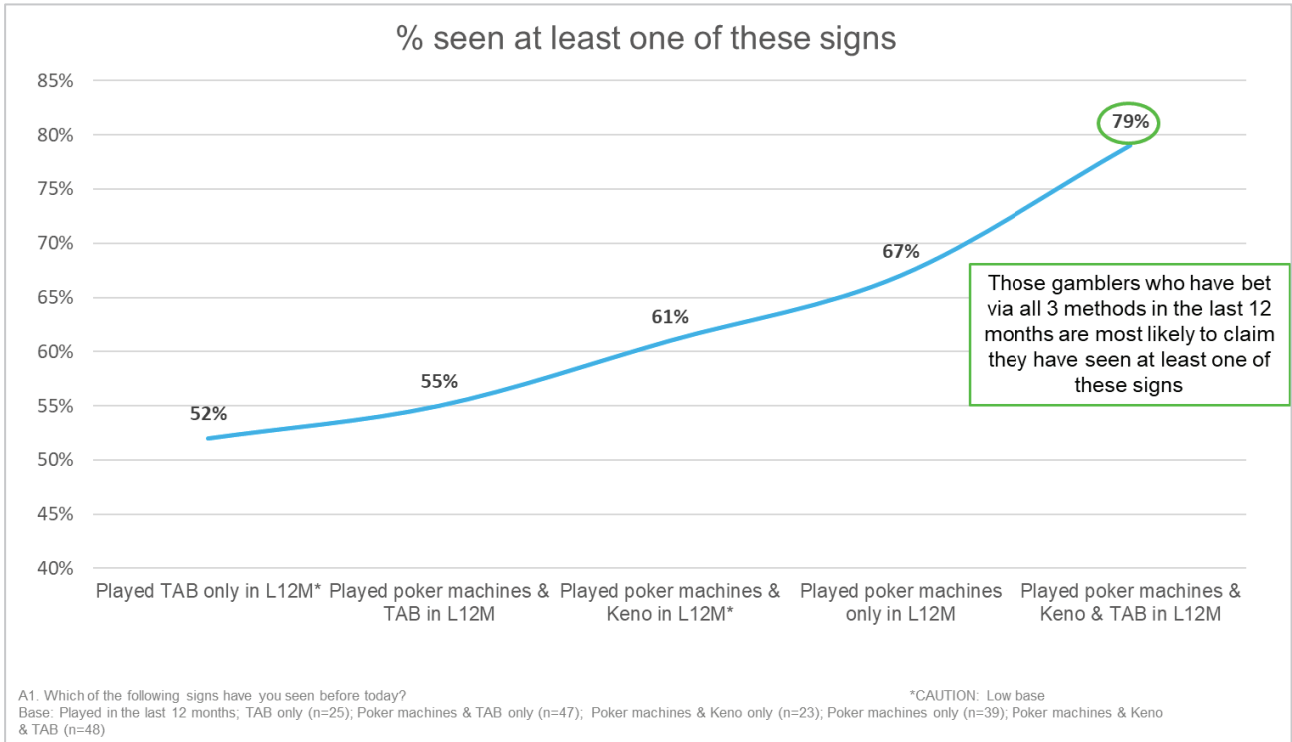


Figure 4: Prompted recognition by type of gambling

Placement of signage

It appears that the materials are recessive within the gambling environment, irrespective of their placement. Overall, the research team observed placement to be somewhat inconsistent across the different venues visited in the research, although all appeared to be in line with the legislative requirements.

In some cases, gamblers identify that posters are placed in fairly recessive locations, which they can identify as a reason the signs do not stand out for them. But, even in venues where gamblers must face materials directly as they walk into the gambling space, they tend not to notice them, further indicating that the materials have simply become wallpaper within the venues.

The figure below shows that gamblers are significantly more likely to have seen the signage in clubs and hotels – across the entire suite of materials. However, it is likely that this finding is driven in large part by the fact that gamblers on the whole are more likely to visit clubs and hotels compared to the casino or TAB outlets.

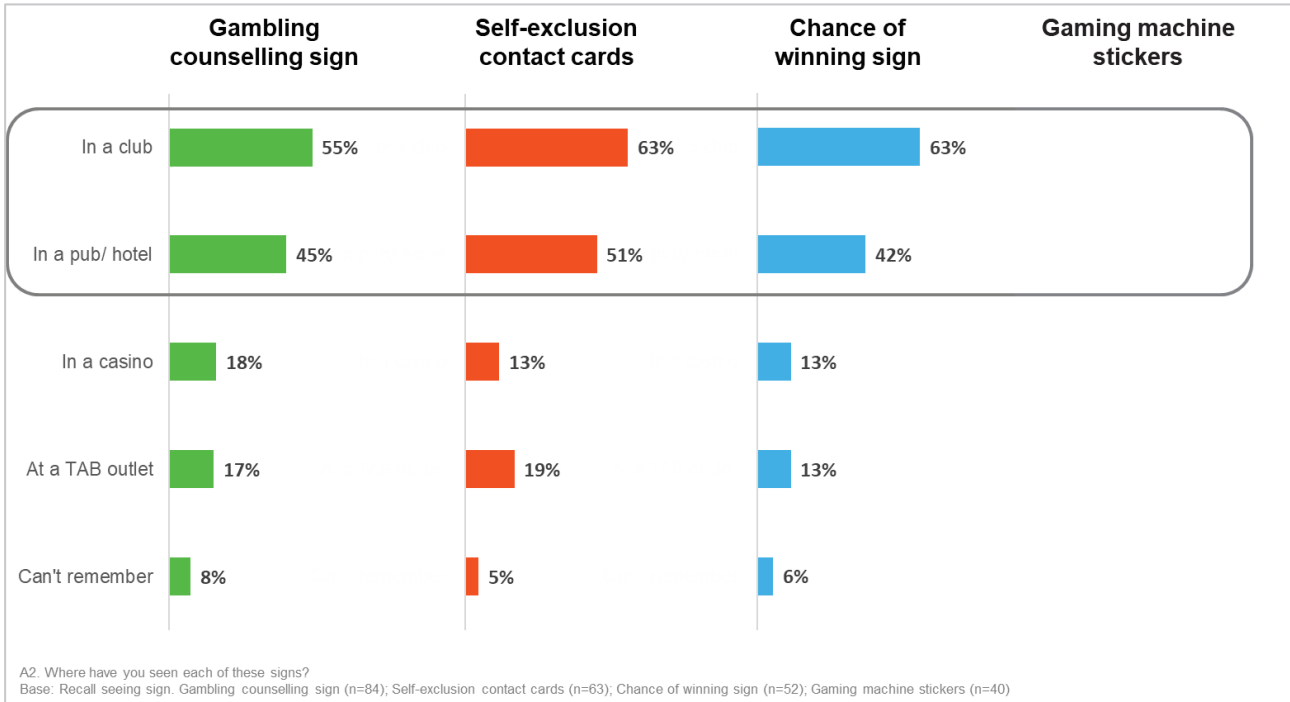


Figure 5: Claimed recall of signage by venue type

6.3 The design of the materials

Relationship to cut through

The design of the materials themselves is widely felt to hinder cut through. Many are quick to spontaneously identify that the materials are relative mono-tonal in nature. Few participants believe that these colours have potential to stand out, even in a relatively plain environment. Certainly, in an environment filled with colour and localised bright lights, few believe that this sign can compete. Additionally, the dark text is also felt to be difficult to make out properly in a dark room – this finding relates to the gaming machine stickers in particular.

Role of text

Many gamblers claim to find the text difficult to process across the materials. In the case of the stickers, the majority believe there is simply too much text – to the point where it can become overwhelming. On posters, the volume of copy is largely felt to be more acceptable, although gamblers are quick to identify that the most powerful information (gambling more, enjoying it less) is recessive compared to the less impactful headline (Think! About your choices).

The quantitative survey involved a task whereby participants were asked to highlight key areas on the signage that stand out the most. The output of this task is a series of heatmaps, shown below, which clearly show the elements of the signage that stand out the most.

The first heatmap shows the key elements of the signage that stand out at the total sample level (i.e. including all types of gamblers together). This clearly shows that only headline messages stand out to gamblers, and that additional text, including contact details simply do not capture the attention of the audience.

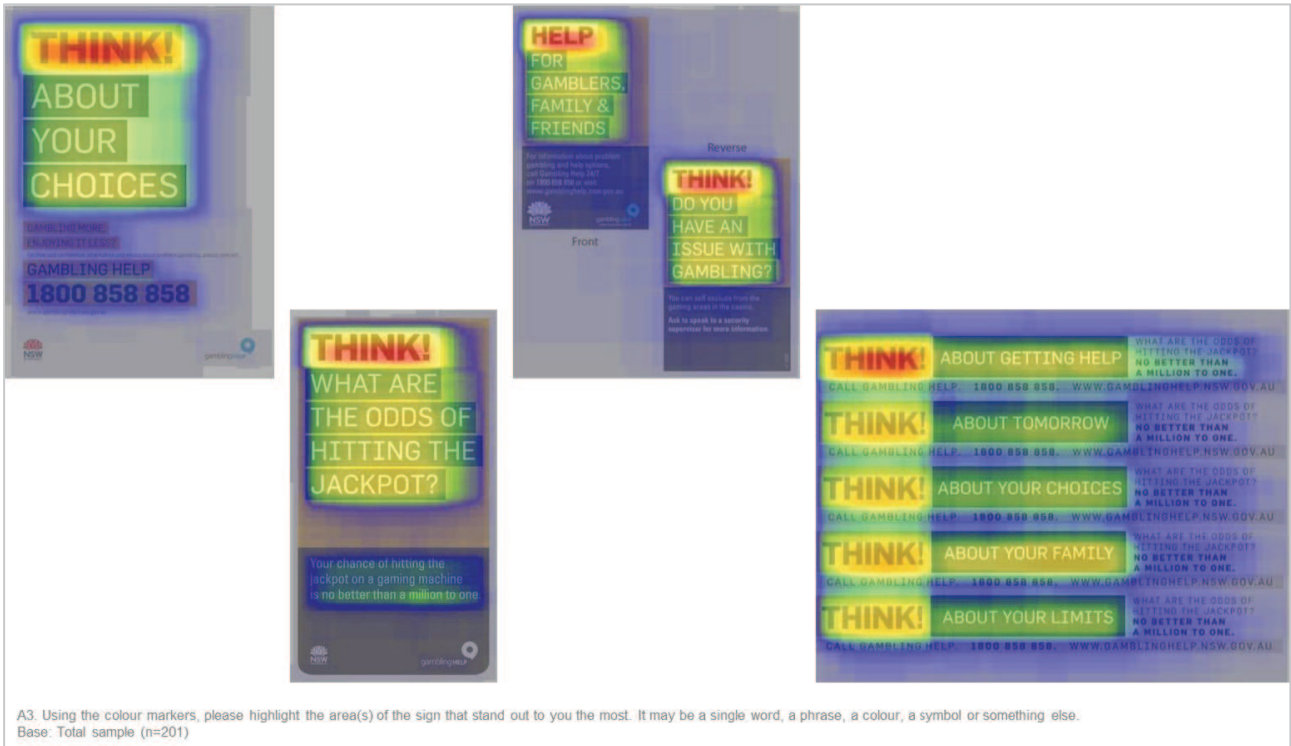


Figure 6: Heatmap showing stand-out elements of materials, at the total sample level

When different gambler types are examined individually (the figure below), it becomes apparent that while most gamblers only notice the headlines, recreational and problem gamblers are more likely to notice the contact details for the gambling helpline.

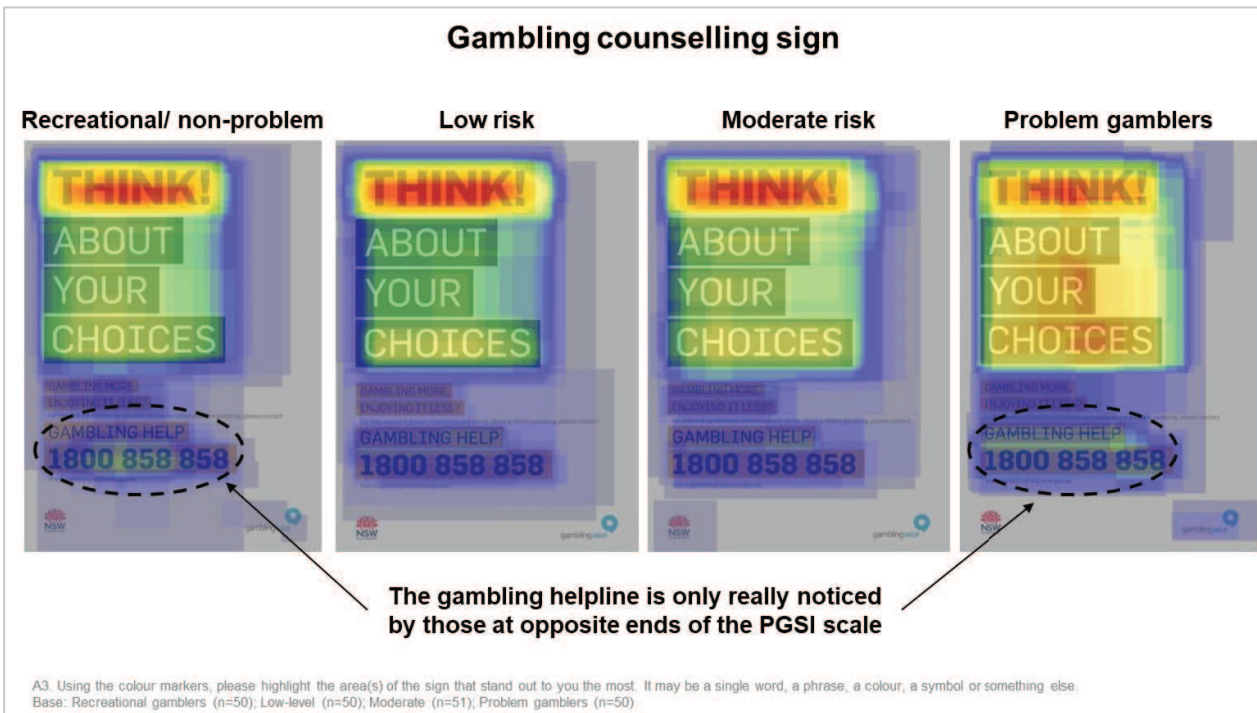


Figure 7: Heatmap showing stand-out elements of the gambling counselling sign, by gambler type

Additionally, the figure below indicates that engagement with the self-exclusion contact cards increases considerably as gamblers move higher up the PGSI risk scale.



Figure 8: Heatmap showing stand-out elements of the contact cards, by gambler type

6.4 Message take-out from materials

Overall take-out

The spontaneous message take-out from the materials appears to be ‘get help’. The vast majority believe that the signage simply asks ‘Do you have a problem with gambling?’, and if the audience member’s answer is in the affirmative, suggests getting help.

For the majority, this message is not felt to be remotely relevant, simply because they are able to very quickly reject the proposition – most are able to tell themselves they do not have a problem, and therefore do not need any help. So, even if the audience does happen to see and take notice of the materials, the message is largely dismissed as being irrelevant in any case. It appears that many have engaged with the signage a long time ago, deemed it irrelevant and have not spared it a second glance since.

The quantitative component of the research included a task which required gamblers to respond to a range of statements evaluating the materials in terms of their impact. The figure below shows a number of interesting findings. First, it demonstrates unequivocally that recreational gamblers do not see the signage as being relevant or impactful for them personally – this group are significantly less likely to agree with statements designed to measure these dimensions. Second, it shows that moderate risk and problem gamblers are significantly more likely to agree that the signs make them feel guilty about their gambling, while problem gamblers are also significantly more likely to see the signs as relevant. However, problem gamblers are also significantly more likely to see the signs as confusing, and less likely to see the signs as being credible or important.

	Total	Recreational %	Low risk %	Moderate risk %	Problem %
The signs deliver an important message	79%	80	84	86	66 ▼
The signs are credible	76%	82	86	78	58 ▼
The signs are eye-catching	76%	78	74	86	64
The signs are helpful for gamblers	63%	60	68	67	58
The signs make stop and think about gambling	47%	28 ▼	56	57	48
The signs make me feel guilty about gambling	37%	18 ▼	24	51 ▲	54 ▲
The signs are relevant to me	31%	8 ▼	20	39	56 ▲
I find the signs confusing	20%	16	6 ▼	14	44 ▲

A4. Below are some statements that people have made about these different signs. Thinking about all of the signs together, how much do you agree or disagree with each statement?
 Base: Total sample (n=201); Recreational gamblers (n=50); Low-level (n=50); Moderate (n=51); Problem gamblers (n=50)

Figure 9: Responses to statements about the signage, by gambler type

Personal relevance of messages

On closer inspection, the majority of gamblers see the messages as being quite rational. The Think! device is felt to naturally ask people to go to quite a rational place, as it is about thinking rather than feeling or intuiting.

Additionally, messages about choices, limits, tomorrow, and getting help are only felt to apply to those who believe they already have a problem – again, few within the target audience seem prepared to acknowledge this without a convincing reason to believe that it is the case. Critically, very few if any are able to identify anything in the materials that reflects their own behaviour or feelings, and so there is no cause for the audience to reconsider their own relationship with gambling. Additionally, few are able to identify any consequences in the material that provokes them to re-think their gambling in a meaningful way.

As a result, the majority self-exclude themselves from the messages. Recreational gamblers unequivocally believe that they are nowhere near having a problem, and so self-exclude instantly, almost without any hint of conscious consideration.

Low and moderate risk gamblers tend to believe that there are plenty of people who do have genuine problems, that these messages would apply to – but there is nothing in these messages that prompts them to consider whether they personally should think about their gambling behaviour.

In line with the spectrum of problem gamblers described earlier, some continue to believe that the messages apply to others who they consider to be 'worse' than themselves. For some problem gamblers this extends to extremes of gambler behaviour.

"I don't wear a nappy at the pokies, and I think these messages are for those people with a real problem."

Those problem gamblers who do see themselves as the intended audience tend to believe that the materials do not come anywhere close to offering a credible solution for the issues that they are experiencing.

Performance of specific messages

Of all the specific materials contained across the suite of materials, messages about enjoyment and family tend to be the most powerful, while messages about jackpots may be counterproductive for some.

The message 'gambling more, enjoying it less' included on the gambling counselling sign is often felt to be particularly strong. For many, it is felt to reflect the emotional experience of someone who could be experiencing issues. Indeed, those at the higher end of the gambling spectrum are often able to identify themselves in this area, given that it reflects one of their 'niggles'. Ultimately, this appears to be a message that carries considerable emotional punch – it often creates discomfort, and as a result it has potential to lead to a re-evaluation of individual gambling behaviour.

Equally, the message 'Think about your family' is widely identified as one of the most powerful messages across the entire suite of materials. Naturally, this message appears to work harder for those people who have children or grandchildren, but irrespective of the personal circumstances of individual gamblers, this message seems to hit home. It serves as a powerful reminder that an individual's gambling affects others they might care about. Critically, this is one message in the current materials which is felt to talk to a consequence of gambling, although it is often identified as being somewhat more indirect than it potentially could be.

The message 'Think! What are the odds of winning the jackpot' could be counterproductive for some gamblers, particularly those at the higher end of the gambling risk spectrum. For some people, the jackpot is a very exciting proposition – and while they are able to agree with the message at a rational level, their superstitions about machines can often override this rational notion. In fact, a message about the jackpot can act as a trigger, and in the worst case scenario, talking about the likelihood of winning can be likened to 'throwing down the gauntlet' for someone who wants to win.

6.5 Tone of the materials

For many, the tone used in the materials can feel overly strident. The capital letters used across the materials can feel a little 'shouty', particularly in a cultural context where text messaging has become increasingly prevalent, and where capitals are widely acknowledged to signify shouting.

Additionally, the Think! device can be perceived by some gamblers as a little judgemental. This group tend to interpret the device as a command, and liken it to someone telling them not to be stupid.

A strident tone may not in itself be a negative when it comes to harm-minimisation messages – tone is a powerful tool in crafting messages, particularly when it comes to creating cut through and impact. However, in this instance it appears that the tone is contributing to an overall aversion to engaging with the materials on the part of gamblers.

6.6 Contact cards and brochures

Contact cards

It seems that the idea of contact cards is quite appreciated, although the content as it stands can be quite off-putting. The idea is almost universally applauded – given their pocket size, the cards are felt to be discreet and easy to pick up. Additionally, the inclusion of contact details for help services is widely felt to be quite important.

Some believe that the placement of the cards can be a little too public – some claim they would be unlikely to pick one up when in full view of other patrons and staff. Many spontaneously suggested that the toilets would offer a more discreet location for the cards, where they could be surreptitiously picked up and hidden away inside a pocket, wallet or purse.

However, at this point many claim to be put off by the line 'Do you have an issue with gambling?'. Again, this is felt to be a question to which the vast majority of gamblers can confidently answer no, meaning it can be dismissed as not relevant when in fact the content is potentially useful.

The casino has recently switched to a custom version of the contact card, which is a wallet-sized fold out card with four main pages. The research did not specifically review this piece of collateral with patrons from the Star casino. However, spontaneous responses from the relatively small casino-specific sample indicate that the black and gold colour scheme may be somewhat more recessive in the environment than the standard contact cards used in other venues. The following figure shows this version of the contact card.

THE STAR ENTERTAINMENT GROUP

Responsible Gambling.

Bet with your head, not over it.

理性博彩

THE STAR SYDNEY Jupiters TREASURY BRISBANE

How to apply for casino exclusion? 如何申请禁门令?

Self-Exclusion 自愿禁门令
Please approach a security officer or casino host in the casino or alternatively approach your gambling help provider to arrange an exclusion without attending the casino.
无需进入赌场, 垂询您的博彩求助专员为您安排禁门令, 或垂询赌场内的任何一名安全专员或赌场接待人员。

Third-party exclusions 第三方禁门令
Please contact the Patron Liaison Manager to arrange an appointment on 请联系顾客联络经理安排预约:

The Star Sydney 02 9777 9000	悉尼星港 02 9777 9000
Jupiters Gold Coast 07 5592 8100	黄金海岸 Jupiters 07 5592 8100
Treasury Brisbane 07 3306 8888	布里斯班 Treasury 07 3306 8888

Think! About your choices. Call Gambling Help 1800 858 858 www.gamblinghelp.nsw.gov.au

Do you or someone you know:

1. Spend more time gambling than planned? YES NO
2. Gamble to the last dollar? YES NO
3. Try to stop gambling but fail? YES NO

If you answered 'YES' to any of the above, gambling might be a problem. Call 1800 858 858 or visit www.gamblinghelponline.org.au for help.

The Star Entertainment Group has a Self Exclusion Program in place especially designed for customers who think that they have or may have a gambling problem. If you or your loved ones are affected, call us today.

Help is available.

您或您身旁是否有人:

1. 花在博彩上的时间比所预期的要长? 是 否
2. 经常赌到分文不剩? 是 否
3. 尝试戒赌但却徒劳无功? 是 否

如果您以上的任何一项答案为“是”赌博可能已成为嗜赌了。请拨打求助热线 1800 858 858 或访问 www.gamblinghelponline.org.au

星港娱乐集团设有自愿拒入计划(Self Exclusion Program), 专为认为自己已经或者可能有问题嗜赌的顾客而设。如果您或您的家人受到影响, 今天就致电我们吧。我们可为您提供帮助。

Figure 10: Custom contact card used at the Star casino

Brochures

Ultimately, the brochures are felt to have very useful content, but to be overly dense and highly unlikely to be picked up in the first place. Across the qualitative sample, the brochures were never noticed, even when gamblers were actively looking for materials. Critically, when the brochures are specifically pointed out, the vast majority indicate that they would never consider picking it up in the venue in any case – they are widely felt to be placed too publicly, and to be too bulky to even think about engaging with them.

During research, when participants were essentially forced to engage with the brochures, the majority indicate that the content is overly dense – there are simply felt to be too many words involved for most people to bother engaging with. But, when pressed to read the content, the majority find that it does include highly useful information which they appreciate. In particular, the brochure is felt to directly and credibly challenge some existing beliefs about poker machines and how they work – ultimately, the science of the system.

6.7 Claimed impact of the materials

It appears that problem gamblers are the group most likely to believe that the materials overall are relevant and guilt-inducing. The figure below shows that this group are significantly more likely to agree that the signs are relevant, and make them feel guilty about gambling. However, this group are also significantly more likely to claim that they find the signage confusing, and less likely to believe that the signs are credible or deliver an important message.

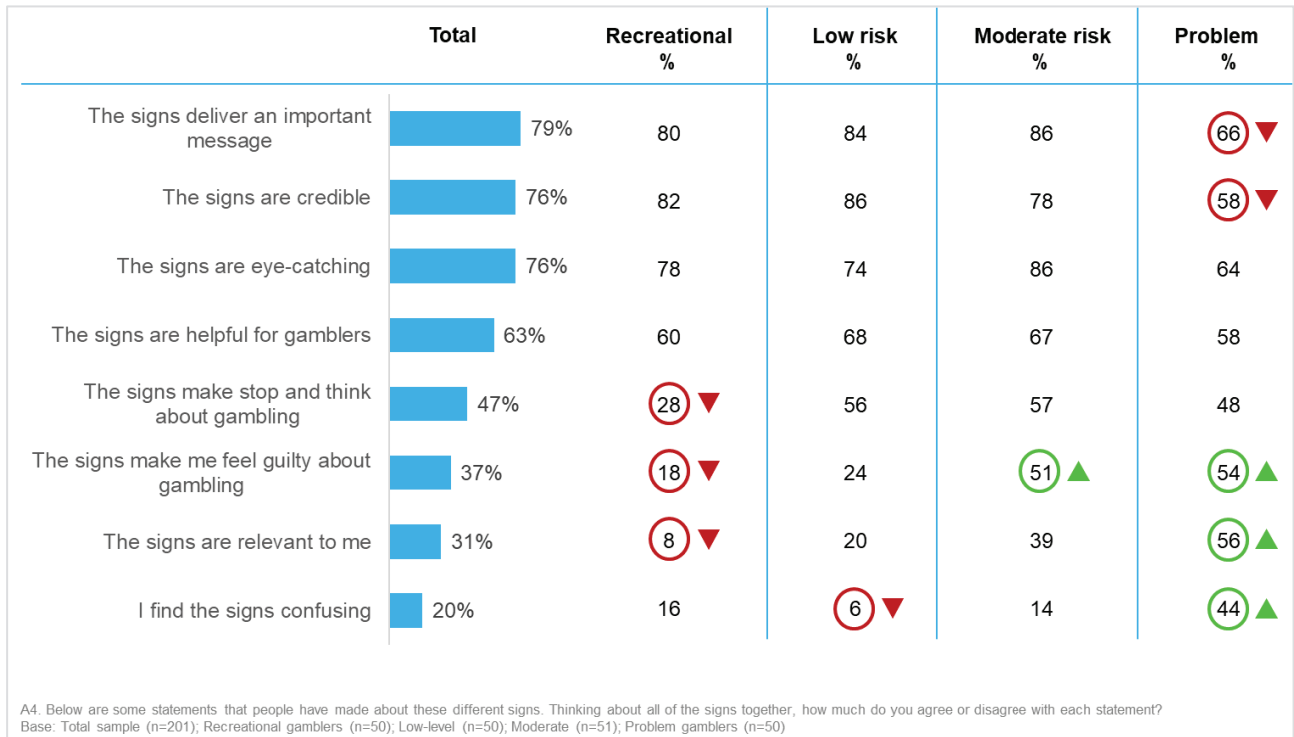


Figure 11: Levels of agreement to statements about the signage overall, by gambler type

Claimed impact among those who have seen the signs

In response to seeing the signage, the biggest response that gamblers claim to have is to think about setting a limit on how much they gamble. The figure below shows that almost half of those who were aware of at least one of the signs claimed that the signage had made them think about setting a limit. However beyond this, the materials have a limited impact on people’s claimed behaviours, with relatively small numbers claiming the signage would encourage them to take a break, stop gambling, or seek help.

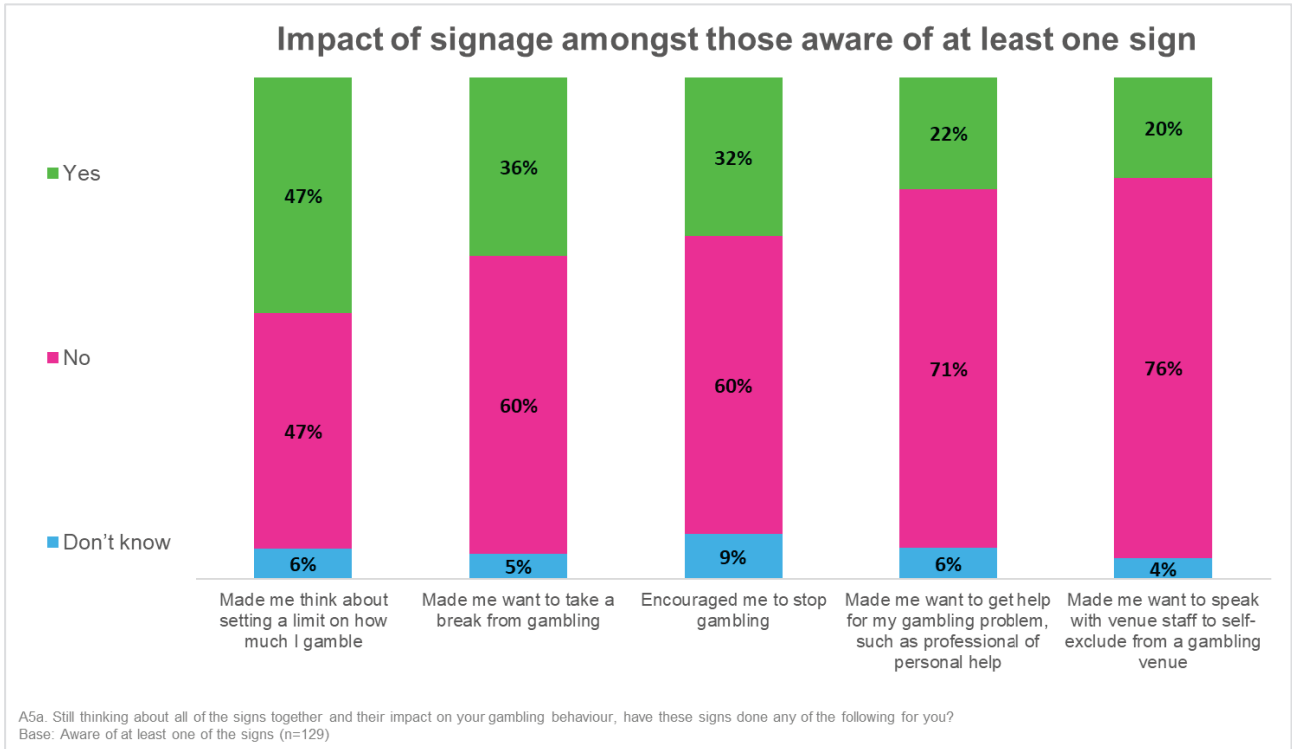


Figure 12: Claimed behavioural responses to the signage, among those who had seen at least one element

However, when these responses are broken down by gambler type, it becomes clear that the signs are significantly more likely to have an impact among the problem gambler cohort than among recreational gamblers. The following figure shows that significantly more problem gamblers than recreational gamblers claim that the signs made them want to take a break, encouraged them to stop, encouraged them to seek help and made them want to speak with venue staff about a self-exclusion scheme.

Column % 'Yes'	Total (n=201)	Recreational (n=50)	Low-level (n=50)	Moderate (n=51)	Problem (n=50)
Made me think about setting a limit on how much money I gamble	47	26 ▼	52	50	55
Made me want to take a break from gambling	36	7 ▼	27	44	58 ▲
Encouraged me to stop gambling	32	11 ▼	24	36	52 ▲
Made me want to get help for my gambling problem	22	4 ▼	18	22	42 ▲
Made me want to speak with venue staff to self-exclude from a gambling venue	20	4 ▼	15	19	39 ▲

Figure 13: Claimed behavioural responses to the signage, by gambler type

Potential claimed impact among those who have not seen the signs

The research also sought to understand the potential impact of the signage among those who claim not to have seen it in the past. The following figure shows that just over one in three of those who have not seen the signs before, claim they would think about their limits or even take a break from gambling after seeing the signs. The fact that this group claim to have never seen the signage clearly speaks to issues with cut through, but their claimed openness to making change having seen messages about their gambling is encouraging for the future of gambling harm-reduction messages.

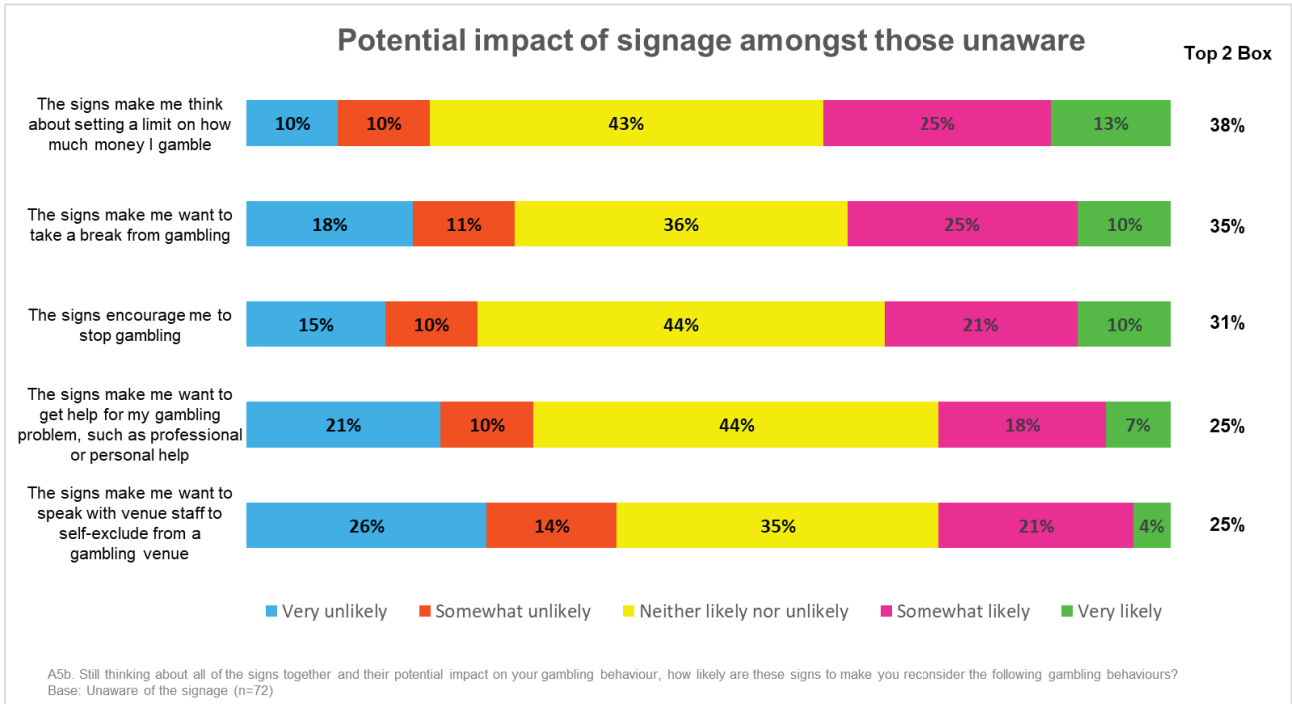


Figure 14: Claimed potential impact of signs among those who have never seen them. Note - 'Top 2 box' refers to the total proportion of respondents who are likely or somewhat likely to agree with each statement.

7. THE VENUE MANAGEMENT PERSPECTIVE

7.1 Perceptions of harm-minimisation efforts overall

Venues claim to have a clear interest in harm-minimisation when it comes to their patrons. The majority of those interviewed as part of this research are quick to indicate that preventing harm from problem gambling is simply the right thing to do. Central to this belief is a sense of having a duty of care to their patrons. Additionally, some venue staff also see themselves as having a broader community level interest in ensuring the wellbeing of people when it comes to gambling harm. This attitude tends to be more pronounced among those involved in clubs, although by no means is it exclusive to this group.

However ultimately there is a widely acknowledged commercial tension at play. Gambling is a core part of the business for many of these venues, and in some cases the financial viability of the organisation depends entirely on the success of gambling operations. Venues have a natural desire to maximise their profits – either because of commercial considerations, or because there is a perceived need to put resources back into communities.

7.2 The reality of harm-minimisation

It seems that in reality, this tension is managed by venues by ensuring that they follow the law, and help those who are genuinely in trouble.

All venues that took part in the research clearly meet their legislative requirements, and take doing so very seriously – most are quick to identify that the risks of not doing so are simply too great for their businesses.

Equally, it is clear that venues have in place arrangements to ensure that patrons who are genuinely in trouble with their gambling receive assistance from the venue. Self-exclusion schemes are available and most venues claim that their patrons are aware of these. Venues are also clear that in some cases, they see the onus being on them to identify regular patrons who may be gambling excessively, and earmark these patrons for a discreet one-on-one intervention by a senior member of the venue staff.

However, outside of meeting the legislative requirements and helping those in clear and obvious trouble, it is clear that venues do little else to minimise the harm to their patrons from gambling. In particular, it seems that moderate risk gamblers tend to receive very little attention from patrons.

7.3 Compliance with legislation

Almost universally, venues indicate that complying with the current legislation can feel quite onerous. Most venues claim that it is a twice-daily task to ensure full compliance, and that this takes a considerable number of staff hours to achieve - in the case of larger clubs and the casino, compliance is estimated to require well above two staff hours per day. The largest driver of this need for daily checking is the requirement for stickers to be located on every poker machine, as these are seen to be vulnerable to being removed by patrons.

Many venue managers report a sense of anxiety about compliance – they are keen to ensure that their venue does not breach the rules, but at the same time they are aware that patrons can create a situation where they are in breach. For example by picking the stickers off machines as they play, and by removing entire stacks of contact cards from the ends of machines and throwing them around the gambling floor.

Ultimately, most see that compliance is a fact of life and that the costs associated with maintaining compliance as a simple cost of doing business. However, many indicate that any changes which would make compliance less onerous would be very welcome.

A strong complaint that is made with considerable regularity is about the need to purchase harm-minimisation stickers in packs of five, particularly when ATMs are required to have a specific sticker only available in the five pack.

7.4 Venue perceptions of the harm-minimisation materials

Ultimately, most venues – both management and staff – see the current suite of harm-minimisation signage as being fairly pointless. Venue staff are very quick to echo the sentiments of gamblers when it comes to the current materials simply acting as wallpaper that does not cut through in the busy environments.

In fact, some venue staff question the likely impact of any type of signage, not just the current materials. Some claim that signs in their venues are frequently ignored by patrons, even those which relate to deals on alcohol that can save patrons money.

The majority also indicate that they rarely need to re-order materials such as brochures, simply because nobody ever takes one away. This finding is consistent with the responses of gamblers. Venues claim that contact cards are the most often replaced item – although as indicated previously, this is often because patrons throw them around after having a few drinks. Again, this finding is substantiated by gamblers themselves, who indicate that they can be ‘offered to friends’ in a fairly boisterous, joking manner during social gambling sessions.

7.5 Venue responses to a potentially changed harm-minimisation regime

Overall, it appears that venues are wary at the notion of a changed regime. A majority see enormous potential for an update to be a costly and time-consuming enterprise for their organisation – particularly those organisations with a large number of poker machines which would require new stickers. Many believe that new materials would take considerable time to roll out across their businesses, as old stickers would need to be removed and any residue carefully cleaned before new signage is applied.

In this context, many harbour concerns about the likely impact of any new materials. Given that the current suite is widely considered to be ‘wallpaper’, many believe that the costs associated with a revamp may yield a negligible benefit and therefore be a waste of time and money. However, most venues acknowledge that an update could help to increase the impact of the materials, at least in the short term.

When it comes to a new approach to harm-minimisation, many venues spontaneously request an approach that tackles the issue slightly differently, ideally to the point where the materials are more likely to stand out for a longer period of time, rather than becoming ‘wallpaper’ as many believe the current suite of materials does. In particular, venues appear to be open to materials with a higher impact being placed at strategic points around their venues, but at less touchpoints. The sticking point appears to be the machine stickers – most venues would prefer an approach that would not require them to place stickers on every machine in their venue.

8. FUTURE OPPORTUNITIES FOR HARM-MINIMISATION SIGNAGE

8.1 Key audiences for harm-minimisation messages

Based on the research findings, it appears that harm-minimisation messages offer the strongest opportunity for those in the 'middle ground' – that is, low and medium risk gamblers.

Ultimately, it appears that recreational gamblers largely dismiss harm-minimisation messages as entirely irrelevant to their personal circumstances. This group dismisses messages that indicate they could be at risk, simply because they do not believe this to be the case. Based on the self-reported gambling behaviours of recreational gamblers, there does not appear to be any great need to disabuse them of this belief.

At the other end of the spectrum, it seems that problem gamblers exhibit a highly entrenched set of gambling behaviours that are unlikely to be changed by harm-minimisation strategies. For this group, it seems that the most important task for harm-minimisation messages is around driving help-seeking behaviour.

So, it appears that low and moderate risk gamblers offer the greatest opportunity for harm-minimisation messages. This group often do have niggles about their gambling behaviour and are open to having these concerns reinforced by messages. Given that the behaviours of this group are less entrenched than those exhibited by the problem gamblers, it seems that harm-minimisation messages will be more likely to have an impact with this audience.

8.2 Overall openness to harm-minimisation materials

Overall, it seems that gamblers are not entirely closed to the idea of harm-minimisation materials. At present, most simply do not see them as being personally relevant, because they are felt to be designed for people who 'have a gambling problem'.

However, it seems that the audience overall, but particularly those who are low and moderate risk, and some problem gamblers, are open to the idea of messages that seek to reduce harm from gambling. If these messages can be made to feel more relevant, then it seems likely that the target audience will be far more receptive to receiving these messages.

8.3 The optimal style for harm-minimisation messages

It seems that harm-minimisation messages could be more personally engaging than they are currently, in order to have a greater impact. It is likely that messages and materials which 'hold up a mirror' to gamblers and reflect their niggles could help materials to feel more relevant.

Given that most gamblers simply self-exclude from current messages, it seems clear that materials must work harder to convince gamblers the messages are directed at them personally, and not at other people who 'really do have a problem'. By allowing gamblers to catch a glimpse of themselves and the niggles they have about their own behaviours, materials are likely to have greater potential to encourage gamblers to re-think their own behaviours.

8.4 Pop-up messages built into gaming machines

The gambler perspective

The research explored a potential future role for harm-minimisation messages which are programmed into gaming machines to pop-up during play. Gamblers appear to be relatively united in the belief that these could have significant potential to disrupt the flow of a gambling session, and a significant proportion claim to like the idea of these messages in theory.

Ultimately, any interruption in play can be seen as a welcome moment for gamblers to take stock of their current situation, take a breath, and make some more rational decisions about their next steps. This is widely seen to be useful among low and moderate risk gamblers during those moments when they might be chasing their losses, as even a brief interruption to the loss-chasing mindset is felt to be helpful in preventing further losses.

In particular, gamblers believe that pop-up messages could be helpful for them at moments when their credits are low and they are considering putting more money through the machine. This is envisaged to be effective because it could target gamblers with harm-minimisation messages in the exact moment when they are actively considering whether or not to gamble more.

In reality, many gamblers acknowledge that a pop-up message could be highly irritating as they seek to engage in their pursuit of gambling. Many are quick to point out that if the message can be dismissed with the click of a button, then this extra click will quickly become second nature and messages will be ignored in the same way that they are currently. While no consistent time period is nominated by gamblers as being optimal for these messages to be displayed, it is likely that in order to be effective, the timing will need to cause a reasonable interruption in play that allows players a moment of pause to evaluate their current situation.

The venue perspective

Venues are universally sceptical about the idea of pop-up messages and raise a number of concerns about them. The most significant concern relates to the retro-fitting of existing machines.

Most believe that it will prove difficult to retro-fit existing machines with the technology required to display pop-up messages during play. In fact, older machines are widely believed not to be up to the task, as their software and hardware is believed to be relatively primitive. There are significant concerns about the cost of implementing changes to existing machines, as well as concerns about machine down-time. At the extreme, some venues are very concerned about the cost of having to replace gaming machines which are simply not able to cope with the additional processing requirements.

Beyond initial concerns about retro-fitting existing machines, venues also have concerns about how such a rule change might impact their ability to source gaming machines that are manufactured in jurisdictions outside of NSW. Many claim that they do source other machines as a way to help differentiate themselves from their competition, and to offer consumers a wider and more exotic set of choices. Ultimately, some believe that it would be difficult to encourage manufacturers to include pop-up messages on these machines, and certainly they believe they would face a greater cost in doing so.

8.5 More regularly refreshed materials

The research findings are very clear that a more regularly refreshed suite of materials could help to drive cut through and impact. Those who are familiar with the materials are quick to identify that the current signage and Think! device have been around for a very long time. In fact, some gamblers under 35 years claim to struggle to remember a time when these materials did not exist.

Wear-out is clearly at play in this instance, although any material will experience some wear-out over time, irrespective of how engaging or personally relevant it is for the audience. As a result, a more regularly refreshed suite of material has potential to maintain cut through and relevance. Multiple messages across the suite of materials could also help to keep patrons engaged with the materials for a longer period of time than a single message across multiple touchpoints.

8.6 Dynamic messages on screens in venues

Some gamblers spontaneously suggest the use of dynamic harm-minimisation messages to be put on screens around gambling venues. Many see this as an opportunity to deliver harm-

minimisation messages in a more engaging way that is less likely to become wallpaper. In particular, these are imagined to be more prominent within the gambling environment, and better able to compete with the light and sound than a static poster ever could.

Many gamblers claim to take notice of screens that are used by venues – they are often felt to include relevant offers for them, so they are often tuned in to what they have to say. As a result, at least initially, it seems that dynamic screens could be more likely to attract the attention of gamblers. The potential also exists to change the materials and messages more frequently at a far lesser cost than for static, printed materials.

8.7 Messages in restrooms

Gamblers are also quick to identify that toilets present a unique opportunity to deliver harm-minimisation messages. Visiting the toilet is felt to be a key moment where people actually take a break and disconnect from the environment around them. This break often provides time and an opportunity for reflection, particularly when people might have niggles about their current gambling behaviour.

Given that the environment of the toilet is typically far quieter and less cluttered than the gambling floor, most claim they would be likely to stop and read materials above urinals or on toilet doors. Additionally, toilets are felt to offer far more privacy than the gambling floor, so those who may be interested in picking up material to take home are far more likely to do so in this more private environment.

8.8 Learning from materials used in other jurisdictions

During the qualitative interviews, a number of harm-minimisation materials currently used in other jurisdictions around Australia were briefly tested. This was by no means a detailed review of each piece of material and was not designed to provide a comprehensive evaluation of each. Rather, it was designed to be a brief review of each to help understand how different styles of messages can work with NSW gamblers. The figure below shows a selection of the materials tested during this research.





Figure 15: A selection of materials from other jurisdictions tested in the research

The use of imagery

It seems that imagery can help to engage the audience, particularly when the imagery is relevant and reflects an element of a gambler's own life. The image of a man playing soccer with his son is felt to clearly tell a relevant story (spending time with family), although imagery which is less clear has potential to fall comparatively flat. For example, the image of the people sitting in the bar is felt to be less clear about the story it is trying to tell.

Overall, it seems that visuals have potential to be more engaging than simple text, and when executed well can help to deliver the message, meaning that less words are required overall.

Simple and direct messages

Based on responses to the different materials, it is clear that a clean, simple and direct approach is more likely to cut through than a message which requires some decoding on the part of the audience. For example, the 'Win lose lose repeat' poster (on red) is felt to be extremely easy to

understand. Additionally, this message works hard to reflect the lived experience of gamblers, and calls into question their behaviour. Many can see themselves in this message and as a result visibly sit up and take notice of what the poster has to say.

In contrast, messages which are felt to require some level of decoding are felt to be less likely to engage overall. For example, the poster with the two flies captioned with 'Bet I can beat you up this wall' is felt to require the audience to read all of the copy and think about its implications before the meaning is clear. While this occurred in a research setting, most gamblers are quick to identify that they would be unlikely to persevere with it in the real world.

The use of colour

While the research did not extensively review the use of different colours across the materials, there does appear to be some indication that the red colour used in the 'Win lose lose repeat' and 'Eat sleep bet repeat' does work to convey a sense of urgency about the message, as well as a sense of danger about the consequences. In contrast, colours such as light blues and greens appear to be less likely to convey this same sense of urgency.

Competing with the gambling environment

Materials that seek to emulate the styles often used in gambling environments appear to have some potential to backfire among gambling audiences. The 'Play your way' and 'You've got the power' posters are often spontaneously identified as being an ad for the local jackpot. The audience appears to rely on the visual cues in the poster (font, imagery, bright golden colours) to determine the topic of the message, with relatively few delving deeper into the message by reading the longer copy. As a result, this is rarely felt to be a message about a harm minimisation initiative. In some cases, the imagery can be seen as a trigger for gambling, as the materials are felt to tap into the excitement that goes around gambling.

8.9 Learning from ClubSafe materials

The research did not focus on the current suite of ClubSafe materials in any great detail. However, some gamblers who participated in a club context were able to spontaneously identify the ClubSafe materials when asked to look for harm-minimisation materials. The research also briefly prompted some participants to review the ClubSafe materials as part of the broader suite of materials from other jurisdictions. The following figure shows the ClubSafe materials explored.

ClubSAFE

THINK! DO YOU HAVE A PROBLEM WITH GAMBLING?

SELF-EXCLUSION & COUNSELLING MAY HELP

This club can help you to SELF-EXCLUDE from part or all of this and other clubs. Free face-to-face or phone counselling is available if you think you have a problem with gambling.

For confidential advice about SELF-EXCLUSION and counselling, please call:

1800 99 77 66

clubsafe@clubsnsw.com.au **24hrs, 7 DAYS**

Or see the Club Official or Manager on Duty

ClubSAFE Counselling is an initiative of ClubsNSW and your local club. To render this sign, call ClubsNSW on 1300 730 001 www.clubsnew.com.au

gambling help 1800 858 858

ClubsNSW

“ If gambling isn't fun anymore, it's OK to ask for help. I'm glad I did. ”

Nathan Hindmarsh
NRL Legend

Nathan Hindmarsh

Nathan Hindmarsh

Figure 16: ClubSafe materials explored during the research

Think! poster

The poster is overall felt to be particularly text-heavy, and as a result is felt to be unlikely to get the attention of gamblers, and to be challenging to decode the core message. The question about problems with gambling suffers from similar issues to the broader suite of materials – that is, the audience find it easy to say ‘no’ and disengage from the message. However, the prominence of the phone number is appreciated for suggesting that help is easy to find for those who need it.

Nathan Hindmarsh poster

The presence of Nathan Hindmarsh can often be a reason to engage with the poster. Those who recognise the footballer tend to know that he has had a problem with gambling before, and as such he is felt to be a useful ambassador for the materials. This poster is largely felt to be relatively straightforward to consume and requires minimal decoding. Additionally, the message is felt to be quite permissive – it encourages help-seeking without ever directing gamblers to self-diagnose as someone who has a problem with gambling. Talking to gambling not being fun is also felt to be a good reflection of how someone might feel who is developing an issue with gambling.

9. KEY FINDINGS

- > There appears to be value in considering a refresh of the gambling harm-minimisation signage and broader strategy as a matter of priority
- > Ideally, a future strategy would aim to deliver a range of messages that hold up a mirror to the niggles that people experience, as a means to ensure that gamblers recognise that the message is in fact for them, and not just other people who 'have bigger problems'
- > In revamping materials, it appears that there is a need to bear in mind the impact that colour, imagery, copy and tone can have on cutthrough and message take-out
- > There may be a need for further research to explore a range of potential communication routes that use a range of different images, copy, colours and tone
- > There may be value in further considering the options for placement around venues – with a view to balancing the need to genuinely disrupt gamblers, with the burden of compliance on venues – as part of this, there may be value in considering an increased role for venue restrooms
- > There may also be value in further considering the use of dynamic screens in venues, as well as pop-up messages on gaming machines, as both appear to have potential to disrupt gamblers at the right moments

10. APPENDIX

10.1 Gambler discussion guide (consumers)

Intros	5 mins
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- > Introduce self and explain project:
 - A study relating to gambling
 - More detail will become clear as we move through the interview but for now we don't want to disclose too much more about the project, including who it is for
- > No right/wrong answers, confidentiality, recording etc
- > Participant intros: name, age, household setup, employment etc

Review of the gambling environment	10 mins
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Explain that we would like them to take us on a 'tour' of the gambling environment. To do this, we would like them to walk us through the gaming machine area/TAB facilities and talk to us about all the different elements of the place that stand out for them. Allow this to be nice and loose, let the participant lead it and don't prompt at all at this stage. Run the tour for about 10 minutes, listen out for any mention of signage / harm minimisation information.

- > What are the different things that get your attention about the gambling environment?
- > What really stands out / is more recessive?
- > As someone who plays pokies / TAB, what do you need to know when you visit a gambling venue like this?
- > Where do you find that information?
- > Is there any other information that stands out for you in this venue?

Review of signage in-situ	10 mins
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Now direct their attention toward the signage in the venue. Ensure you look at everything you can find including posters, brochures and stickers on the venue's ATM.

- > What are your thoughts about these materials?
- > How familiar are they?
- > How often do you notice these materials when you are in venues like this?
- > To what extent do they stand out in this venue, and cut through the clutter?
- > How engaging is the signage in this environment?
- > What messages do you think this signage is delivering?
- > Who do you think this signage is trying to talk to?
- > How effective do you think the signage is overall?
- > In what ways does the signage influence you, or others, in the venue?
- > How do you think these messages could be better delivered in this environment (draw on the insights obtained during the tour to probe around potential ways to deliver messages)

Move away from the gambling area and into the more neutral location (ideally a café outside) to complete the remainder of the interview.

Detailed review of materials	10 mins
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Go through the full suite of materials, one by one to review.

For each:

- > What is your overall reaction to this material?
- > What score would you give it out of 10?
- > What do you like / dislike about this material?
- > What is the material trying to say? What is your reaction to this message?
- > What is the material asking you to do?
- > What impression does the material give about the topic?
- > Is the material clear? Is anything unclear?
- > Is there any new information contained in this material?
- > How fresh / familiar do you find this material?
- > How do you feel about the design of the material overall?
- > How would you describe the tone of the material?
- > How likely do you think people are to pay attention to the material? Why / why not?
- > In what ways did it influence you?

Overall:

- > How impactful do you find this material?
- > How personally relevant are the messages contained in these materials?
- > To what extent does this material make you think / behave differently?
- > What impact can these materials have on people's attitudes toward gambling?
- > Which materials do you think are the strongest of everything we've looked at?
- > How do you think these materials could be improved? (Probe fully)

Different ways to communicate about harm minimisation for gambling	10 mins
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- > How appropriate do you think it is that these messages are delivered in gambling environments?
- > What messages do you think are important to deliver in this context? (Probe around any other messages that are not part of the existing suite)
- > How do you think this type of message could be better delivered?
 - To stand out more?
 - To better engage the audience?
 - To deliver messages clearly?
 - To have a greater impact on attitudes / behaviours in relation to gambling?

- > Can you think of examples where messages work well to get attention and deliver a message in an environment like this?

Show a small selection of other gambling harm-minimisation materials and quickly explore:

- > Which of these stands out to you? Why?
- > What do you like / dislike about these different materials?
- > How do you feel about the different messages delivered?
- > How do you feel about the design / style of these materials?
- > What could we learn from these materials?

THANKS AND CLOSE

10.2 Staff/manager discussion guide

Intros	10 mins
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- > Introduce self and explain project:
 - A study relating to gambling
 - Conducted on behalf of L&GNSW
 - Part of a review of harm minimisation signage to ensure its efficacy and explore implications from a venue management perspective
 - Reinforce we are not there to review their establishment specifically – we simply want to talk to consumers in-situ and ClubsNSW (for club venues)/AHA (for hotel venues)/casino management identified them as a suitable venue
 - No right/wrong answers, confidentiality, recording etc
- > Participant intros: name, role, a bit about the venue (types of patrons etc), role of gambling for the venue, how does your venue keep up with all the legislations and requirements?

Review of signage overall	10 mins
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Ask questions from the perspective of the staff member as an expert, with a view to assessing the performance of the signage among patrons.

- > How do you make sure the right signs are placed in the correct places within the venue?
- > What are your thoughts about these materials?
- > How familiar are they for patrons?
- > How often do you think patrons notice these materials when they are in venues like this?
- > To what extent do they stand out in this venue, and cut through the clutter?
- > Which signs/messages do you think are most effective? Why do you say that?
- > Which signs do you and your staff find the most useful in helping you do your jobs? Why is that?
- > How engaging is the signage in this environment?
- > What messages do you think this signage is delivering to patrons?
- > Who do you think this signage talks to? (Probe around types of patrons)
- > How effective do you think the signage is overall?

Detailed review of materials	10 mins
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Go through the full suite of materials, one by one to review.

For each:

- > What is your overall reaction to this material?
- > What score would you give it out of 10?
- > What do you like / dislike about this material?
- > What is the material trying to say? What is your reaction to this message?
- > What is the material asking you to do?

- > What impression does the material give about the topic?
- > Is the material clear? Is anything unclear?
- > Is there any new information contained in this material?
- > How fresh / familiar do you find this material?
- > How do you feel about the design of the material overall?
- > How would you describe the tone of the material?
- > How likely do you think people are to pay attention to the material? Why / why not?

Overall:

- > How impactful do you find this material?
- > How personally relevant are the messages contained in these materials for your patrons?
- > Have patrons mentioned these materials to you or referred to any of the messages e.g. self-exclusion, gambling helpline?
- > To what extent do you think this material makes your patrons think / behave differently?
- > What impact can these materials have on people’s attitudes toward gambling?
- > Which materials do you think are the strongest of everything we’ve looked at? Why do you say that?
- > Which materials do you think are the least effective? Why do you say that?
- > How do you think these materials could be improved? (Probe fully)

Review of signage from a venue management perspective	10 mins
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- > What are some of the issues that venues like this face when it comes to gambling and harm minimisation?
- > What impact does this signage have on the running of the operation?
- > What are some of the benefits / drawbacks of this signage from the venue’s perspective?
- > What are some of the challenges for the venue when it comes to displaying these messages?
- > How could the placement/location of the signs be changed to improve message effectiveness?
- > What considerations are important for venues like yours when it comes to the future development of harm minimisation materials for gambling?

<i>Different ways to communicate about harm minimisation for gambling</i>	10 mins
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- > How appropriate do you think it is that these messages are delivered in gambling environments?
- > What messages do you think are important to deliver in this context? (Probe around any other messages that are not part of the existing suite)
- > How do you think this type of message could be better delivered?
 - To stand out more?
 - To better engage the audience?
 - To deliver messages clearly?

- To have a greater impact on attitudes / behaviours in relation to gambling?
- > Can you think of examples where messages work well to get attention and deliver a message in an environment like this?

Show a small selection of other gambling harm-minimisation materials and quickly explore:

- > Which of these stands out to you? Why?
- > What do you like / dislike about these different materials?
- > How do you feel about the different messages delivered?
- > How do you feel about the design / style of these materials?
- > What could we learn from these materials?

THANKS AND CLOSE

10.3 Quantitative survey

SECTION 1 – SCREENING

INTRODUCTION

Thank you for your interest in this survey. Should you qualify for the main survey, it should take around 5-7 minutes to complete, depending on your answers. Your responses will be kept confidential and will not be used for any purpose other than this study.

To begin with, just a few questions about you.

INDUSTRY

ASK ALL, MR

S1. Do you or any of your family work in any of the following industries?

- Market research/ data collection..... 1
- Advertising, marketing or public relations 2
- Journalism or media 3
- In a pub, club or casino..... 4
- Gambling industry (including sports/ racing betting, poker machines, lotteries) ... 5
- Financial services 6

CLOSE IF ANY OF CODES 1-5 SELECTED, CONTINUE IF ONLY CODE 6 SELECTED

GENDER

ASK ALL, SR

S2. Are you...?

- Male 1
- Female 2

AGE

ASK ALL, SR

RECORD EXACT AGE AND CODE INTO BANDS.

S3. How old are you?

- Under 18 years 1 CLOSE
- 18-19 years 2
- 20-24 years 3
- 25-29 years 4
- 30-34 years 5
- 35-39 years 6
- 40-44 years 7
- 45-49 years 8
- 50-54 years 9
- 55-59 years 10
- 60-64 years 11
- 65-74 years 12
- Over 75 13 CLOSE
- Prefer not to say 98 CLOSE

LOCATION – METRO VS. REGIONAL

ASK ALL, SR

S4. What is your postcode?

[SINGLE OPEN-END TEXT BOX]

[HIDDEN VARIABLE – METRO AND REGIONAL POSTCODE ROLL-UP]

GAMBLING

ASK ALL, MR

S5. Which of the following have you done in the past 12 months?

- Placed a bet at a TAB outlet in a club, pub/ hotel or the casino 1
- Played a poker machine (pokies) in a club, pub/ hotel or the casino 2
- Played Keno in a club, pub/ hotel or the casino 3
- Played Lotto (bought ticket at a newsagent, convenience store or online) 4
- None of these [EXCLUSIVE] 5

CODE 1, 2 OR 3 MUST BE SELECTED TO CONTINUE

S6. In which one of the following venues do you gamble **most often**?

- In a pub/ hotel 1
- In a club 2
- At a TAB outlet in a club, pub/ hotel or the casino 3
- In the casino 4

QUESTIONS TO DETERMINE GAMBLER TYPE

*****PLEASE NOTE THAT RESPONDENTS SHOULD NOT SEE WHICH CATEGORY THEY LAND IN AT ANY POINT IN THE SURVEY *****

We'd now like to ask you a series of questions about gambling. Please answer as truthfully as possible and remember that your answers are confidential, and only used to determine whether you are suitable to take part in the study.

All of the questions relate to the **last 12 months**.

S8. Thinking about the last 12 months, have you bet more than you could really afford to lose?

Never	0	TAKE SCORE (either 0,1,2 or 3 depending on response)
Sometimes	1	
Most of the time	2	
Almost always	3	

S9. Still thinking about the last 12 months, have you needed to gamble with larger amounts of money to get the same feeling of excitement?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S10. When you gambled, did you go back another day and try to win back the money you lost?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S11. Have you borrowed money or sold anything to get money to gamble?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S12. Have you felt that you might have a problem with gambling?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S13. Has gambling caused you any health problems, including stress or anxiety?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S14. Have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S15. Has your gambling caused any financial problems for you or your household?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

S16. Have you felt guilty about the way you gamble or what happens when you gamble?

Never	0	ADD SCORE TO TOTAL DEPENDING ON RESPONSE
Sometimes	1	
Most of the time	2	
Almost always	3	

TO IDENTIFY GAMBLER TYPE

Total the scores across the 9 questions (S8-S16) and use the following as a guide:

Score	Type	Number of completes
0	Recreational/Non-problem	Minimum n=50
1-2	Low-level	Minimum n=50
3-7	Moderate	Minimum n=50
8 or more	Problem	Best efforts basis

SECTION 2 – GAMBLING SIGNAGE EVALUATION

SIGN RECOGNITION

ASK ALL, MR

A1. Which of the following signs have you seen before today? *Please select all that apply*

[SHOW SIGN IMAGES - RANDOMISE ORDER]

THINK! Gambling counselling sign 1
 THINK! Self-exclusion contact cards 2
 THINK! Chance of winning sign 3
 THINK! Gaming machine stickers 4
 None of these [EXCLUSIVE] 99

ASK A2 FOR EACH OF THE SIGNS RECOGNISED AT A1. IF NO SIGNS WERE RECOGNISED AT A1 THEN SKIP TO A3

A2. Where did you see each of these signs? *Please select all that apply*

ROWS

In a pub/ hotel 1
 In a club 2
 In a casino 3
 At a TAB outlet in a club, pub/ hotel or the casino 4
 Can't remember 5

COLUMNS [ONLY SHOW IMAGES OF THE SIGNS RECOGNISED AT A1]

THINK! Gambling counselling sign 1
 THINK! Self-exclusion contact cards 2
 THINK! Chance of winning sign 3
 THINK! Gaming machine stickers 4

A3. Using the colour markers, please highlight the area(s) of the sign that stand out to you the most? It may be a single word, a phrase, a colour, a symbol or something else.

SHOW EACH RESPONDENT ONE SIGN ONLY AND ROTATE THE ORDER ACROSS THE 4 GAMBLER TYPES

THINK! Gambling counselling sign 1
 THINK! Self-exclusion contact cards 2
 THINK! Chance of winning sign 3
 THINK! Gaming machine stickers 4

A4. Below are some statements that people have made about these different signs. Thinking about all of the signs together, how much do you agree or disagree with each statement?

ROWS [RANDOMISE]

The signs are relevant to me 1
 The signs are credible 2
 I find the signs confusing 3
 The signs are eye-catching 4
 The signs make me stop and think about gambling 5
 The signs make me feel guilty about gambling 6
 The signs deliver an important message 7
 The signs are helpful for gamblers 8

COLUMNS

Strongly agree	5
Slightly agree	4
Neither agree nor disagree	3
Slightly disagree	2
Strongly disagree	1

ASK THOSE AWARE OF AT LEAST ONE SIGN AT A1, SR per row

A5a. Still thinking about all of the signs together and their impact on your gambling behaviour, have these signs done any of the following for you?

ROWS

Encouraged me to stop gambling	1
Made me want to take a break from gambling	2
Made me think about setting a limit on how much money I gamble	3
Made me want to get help for my gambling problem, such as professional or personal help	4
Made me want to speak with venue staff to self-exclude from a gambling venue	5

COLUMNS

Yes	1
No	2
Don't know	98

ASK THOSE UNAWARE OF ALL SIGNS AT A1, SR per row

A5b. Still thinking about all of the signs together and their potential impact on your gambling behaviour, how likely are these signs to make you reconsider the following gambling behaviours?

ROWS

The signs encourage me to stop gambling	1
The signs make me want to take a break from gambling	2
The signs make me think about setting a limit on how much money I gamble	3
The signs make me want to get help for my gambling problem, such as professional or personal help	4
The signs make me want to speak with venue staff to self-exclude from a gambling venue	5

COLUMNS

Very likely	5
Somewhat likely	4
Neither likely nor unlikely	3
Somewhat unlikely	2
Very unlikely	1

A6. Still thinking about all of the signs together, what is the one improvement you would suggest?

[SINGLE TEXT BOX – NON-COMPULSORY]

SECTION 3 – CLASSIFICATION

Nearly finished, Thanks for all your answers. To finish, there are a few questions about you and your household...

HOUSEHOLD COMPOSITION

ASK ALL, SR

C1. Which of following best describes your current living arrangements?

- I live by myself 1
- I live with other adults 2
- I live with my partner and no children 3
- I live with my partner and child/children..... 4
- I live with my child/children 5

LEVEL OF EDUCATION

ASK ALL, SR

C2. What is the highest level of education you have completed?

- Primary school 1
- Years 7-9 2
- School Certificate / Intermediate / Year 10 / 4th Form/ Year 11..... 3
- HSC/Year 12/6th Form 4
- Trade / apprenticeship / TAFE / Technical Certificate 5
- Diploma..... 6
- Bachelor Degree / Post-Graduate Degree 7
- Other (Specify)..... 8
- Prefer not to say 99

EMPLOYMENT STATUS

ASK ALL, SR

C3. What is your current employment status? Are you...?

- Employed full-time 1
- Employed part-time..... 2
- Unemployed..... 3
- Retired or on a pension 4
- A full-time student 5
- Full time parent/carer 6
- Other (Specify)..... 7
- Prefer not to say 99

INCOME

ASK ALL, SR

C4. What is your combined household income, per year, before tax?

- Under \$25,000 1
- \$25,000 - \$39,999..... 2
- \$40,000 - \$59,999..... 3
- \$60,000 - \$79,999..... 4
- \$80,000 - \$99,999..... 5
- \$100,000 - \$149,999..... 6
- \$150,000 - \$199,999..... 7
- \$200,000 - \$299,999..... 8

\$300,000 or over.....	9
Prefer not to say	99

ABORIGINAL OR TORRES STRAIT ISLANDER

ASK ALL, SR

C5. Are you from an Aboriginal or Torres Strait Islander background?

Yes.....	1
No	2
Prefer not to say	3

LANGUAGE

ASK ALL, SR

C6a. Is a language other than English regularly spoken in your household?

Yes.....	1
No	2
Prefer not to say	99

LANGUAGE AT HOME

ASK IF OTHER THAN ENGLISH IS SPOKE AT HOME CODE 1 IN C7a, MR

C6b. What language(s) other than English are regularly spoken at home?

Arabic.....	1
Cantonese	2
Mandarin.....	3
Greek	4
Italian	5
Vietnamese.....	6
Spanish.....	7
Turkish	8
Serbian.....	9
Croatian	10
Macedonian	11
Hindi.....	12
French.....	13
German.....	14
Other (specify)	97

THANK & CLOSE