

Independent Gambling Authority of South Australia

Three Year Evaluative Research Report of the Advertising and Responsible Gambling Codes of Practice – Mandatory Warning Message

10 February 2012



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Executive Summary and Conclusions

The *Advertising Code of Practice* and the *Responsible Gambling Code of Practice* became operational on 01 December 2008 with regard to the suite of six warning messages to be rotated on a six-monthly basis over a period of three years and the condensed warning message. The *Advertising Code of Practice* defines the protocol for use and rotation of the expanded warning message.

In July 2008, the Independent Gambling Authority of South Australia contracted Insightrix Research Pty Ltd. to conduct evaluative research regarding the impact and recognition of the condensed and expanded warning messages that became operational on 01 December 2008 with the general population of South Australia.

Results were collected from 28 November 2008 to 09 December 2011. A total of 5,421 respondents completed the survey across 18 waves of research. The research includes a pre-campaign, mid campaign and post campaign survey for each of the six expanded warning messages, totalling 18 waves. Due to the self-selection bias inherent with online panel research, a margin of error calculation is not applicable. The survey was conducted in English.

Research Findings

Gambling Profiles

Respondents who gamble were asked a series of questions based on their gambling habits in order to assess their gambling risk-level based on the Canadian Problem Gambling Index. Overall, about one third (34.6%) of respondents are classified as non-gamblers, while one third are non-problem gamblers (34.3%), 14.0% are low risk gamblers, 10.9% are moderate risk gamblers and 6.2% are classified as problem gamblers.

Overall Message Awareness

On an unaided basis two thirds (66.2%) of respondents overall recall being exposed to any gambling advertising in the six months prior to completing the survey. On an aided basis, a strong proportion (77.8%) recall hearing or seeing the “Gamble responsibly” message.

Those respondents classified as problem gamblers are significantly more likely to recall each campaign message compared to other gambler types. Television is the most common location all respondents report recalling exposure to both the overall “Gamble responsibly” message as well as the specific campaign message.

Awareness of the “Gamble responsibly” message is widespread

When asked if they recall any gambling related advertising on an unaided basis, two thirds of respondents (66.2%) recall such advertising. When presented with the phrase Gamble Responsibly, an even stronger proportion of respondents (77.8%) recall seeing, reading or hearing the phrase in advertisements.

Problem gamblers are seeing the messages and have the highest frequency of recall

The results demonstrate that problem gamblers are the most likely type of gamblers to recall seeing both the condensed “Gamble responsibly” message as well as the expanded warning messages. Problem gamblers are also most likely to recall that their exposure to the advertising was in a gambling venue. However, more research is required to fully understand whether these messages have caused a change in behaviour on the part of problem gamblers. No change was seen in the proportion of respondents classified as problem gamblers throughout the research, suggesting that problem gamblers continue to make up a consistent proportion of the population.

Several campaign messages achieved a noticeable lift in recall throughout their campaign

The following messages achieved a significant lift when comparing the pre- and post-campaign recall rates:

- “Don’t chase your losses. Walk away. Gamble responsibly.” – Up 9.1%
- “Know when to stop. Don’t go over the top. Gamble responsibly.” – Up 10.4%
- “Think of the people who need your support. Gamble responsibly” – Up 9.0%

Based on this research study we are unable to provide the reasons for the lift of recall. A number of factors could be involved including: the dollar amount spent on each of the campaigns, the campaign’s media usage and reach, consistency of the advertising across all six messages and the target audience of each message campaign. The data is not available to look at any of these factors and their relationship to the respondents’ recall.

Gaming machines appear to attract problem gamblers

Gaming machines and lotteries products are more commonly played by problem gamblers. When asking respondents which type of gaming they participate in most often, problem gamblers are much more likely to play on gaming machines (42.9%) compared to low-risk (23.6%) or non-problem gamblers (12.0%).

TABLE OF CONTENTS

Executive Summary and Conclusions.....	i
Awareness of the “Gamble responsibly” message is widespread.....	ii
Problem gamblers are seeing the messages and have the highest frequency of recall.....	ii
Several campaign messages achieved a noticeable lift in recall throughout their campaign	ii
Gaming machines appear to attract problem gamblers	ii
Introduction.....	1
Study Background and Objectives.....	1
Methodology	3
Message Presentation	3
Development of Questionnaire	3
Quantitative Data Collection.....	4
Survey Analysis and Reporting.....	4
Response Rates.....	4
Reporting Notes.....	5
Study Results.....	7
Gambling Habits.....	7
Gambling Profiles.....	8
Advertising Related to Gambling.....	9
“Gamble Responsibly” Messaging.....	10
Media Source of Messaging	11
Specific Messaging	13
Media Sources for Specific Campaign Messages	15
Type of Gambling	17
Frequency of Gambling	19
Gambler Profiles.....	20
Problem Gambler	21
Non-problem Gambler	22
Low Risk Gambler	23
Moderate Risk Gambler	24
Non-gambler.....	25
Demographics.....	26
Conclusions.....	29
Appendix A – Survey Tool	30
Appendix B – Canadian Problem Gambler Index	35

Introduction

STUDY BACKGROUND AND OBJECTIVES

In April 2004 the mandatory advertising and responsible gambling codes of practice became operational and were referred to as first stage codes, applicable to the casino, SA Lotteries, SA TAB, licensed racing clubs and gaming machine venues. It was within these first stage codes that the tag-line “Gamble responsibly” began to be used.

On 17 May 2007 the Authority released a report, *Review 2006: Regulatory Functions*, which reviewed the first stage codes and settled the second stage issues. The second stage issues centred on the adoption of a suite of messages adopted in Queensland, with the common theme of “Gamble responsibly”.

The *Advertising Code of Practice* and the *Responsible Gambling Code of Practice* became operational on 01 December 2008 with regard to the suite of six warning messages to be rotated on a six-monthly basis over a period of three years.

The condensed warning message “Gamble responsibly” was to be used where it is not reasonable or practical to include an expanded warning message.

The expanded warning messages are:

- “Don’t chase your losses. Walk away. Gamble responsibly.”
- “Don’t let the game play you. Stay in control. Gamble responsibly.”
- “Stay in control. Leave before you lose it. Gamble responsibly.”
- “You know the score. Stay in control. Gamble responsibly.”
- “Know when to stop. Don’t go over the top. Gamble responsibly.”
- “Think of the people who need your support. Gamble responsibly.”

The *Advertising Code of Practice* defines the protocol for use and rotation of the expanded warning message. For the purpose of this research it should be highlighted that the use of the messages relies on various venues’ attention to the timing of the messages, and the level and frequency of advertising and the promotions that include the messages. This research has not monitored the various releases of the messages within each venue nor the consistency of use, or the level of advertising spending by venues and businesses to promote the messages.

In July 2008, the Independent Gambling Authority of South Australia contracted Insightrix Research Pty Ltd. to conduct evaluative research regarding the impact and recognition of the condensed and expanded warning messages that became operational on 01 December 2008 with the general population of South Australia. Specific objectives of the research study included:

- Understanding the awareness of gambling advertising in South Australia;
- Evaluate the awareness and effectiveness of six specific expanded warning messages
- Evaluate the impact and recognition of the condensed warning message and the expanded warning messages, as a whole and separately.
- Compare the impact and recognition of the condensed warning message and the expanded warning messages within the general populations and amongst people who participate in gambling
- Scope those responding to the research and classify where they recall seeing the message within the gambling industry and across individual providers.
- Monitor the impact and recognition of individual expanded warning messages, including points of message change, within the general population and amongst those that participate in gambling.
- Scope the respondents' differences in impact and recognition of the condensed and expanded warning messages between customers of different types of gambling providers.
- Scope respondents and their attendance at various facilities including: casino, SA Lotteries, SA TAB, Licensed racing clubs and gaming machine venues; and
- Illustrate how people visit and their playing habits at casinos, and subsequently
- Classify respondents' gambling habits rated against the Canadian Problem Gambling Index (CPGI). This CPGI groups gamblers within non-gamblers, non-problem gamblers, low risk gamblers, moderate risk gamblers, or problem gamblers.

While the research was undertaken with the general population, respondents are classified as non-gamblers, non-problem gamblers, low risk gamblers, moderate risk gamblers, or problem gamblers based on their gambling habits as defined by the Canadian Problem Gambling Index (CPGI). To achieve the above research objectives, many results are presented comparatively between these different gambler classifications.

Methodology

Message Presentation

As outlined above, the study was used to evaluate the recall and effectiveness of reach for six expanded warning messages and the condensed warning message. When in the market, these messages were primarily visible in gambling venues, television and radio media, and print media as well as a number of other sources. Each message was visible in the market for a six month period. Approximately 900 survey evaluations were conducted for each message, with approximately 300 surveys being conducted prior to the message entering the market, midway through the message campaign, and after the message campaign ended. Each of these pre-campaign, mid-campaign, and post-campaign surveys was considered to be a wave of research.

Questions detailing gambling habits, the condensed “Gamble responsibly” message, the expanded warning message in use at the time and demographics were included in all waves of research.

Development of Questionnaire

Insightrix developed the survey instrument in consultation with the Independent Gambling Authority of South Australia (herein referred to as “IGA”). Insightrix worked closely with the IGA throughout the instrument design phase to finalise the questionnaire by ensuring proper wording and flow of survey questions and suggesting survey improvements for data collection. Care was taken to ensure minimal changes to the questionnaire were included between waves so that the most recent wave of research could be compared to previous waves. Questions from the Canadian Problem Gambling Index (CPGI) were included in each survey in order to classify respondents into different gambler types. This allowed for comparisons by these classifications, and allowed analysis to include effectiveness measurements for each message by different gambler types. The survey was programmed into an online interviewing system for data collection.

Each specific expanded warning message was present in casinos and gambling establishments at different times from 2008 to 2011. As such, three waves of research were conducted with each specific message (pre-campaign, mid-campaign, and post-campaign) in order to review each in depth. A total of 18 waves were conducted, 3 (pre-campaign, mid-campaign, and post-

campaign) for each of the six expanded warning messages. A copy of the questionnaire document can be referenced in Appendix A.

Quantitative Data Collection

Insightrix utilised an online research panel in order to engage the general population in South Australia. For each wave of research, a base of 300 respondents representative of the region by age and gender completed the study. Potential respondents were emailed an opportunity to participate in the research, and daily monitoring was conducted to ensure representative quotas were met. Steps were taken to ensure that no single respondent could complete the study more than once every 9- 12 months in order to ensure no overexposure to the messages which could impact recall rates. This ensured that recognition of the message came from daily awareness and not repeated exposure to the survey.

Survey Analysis and Reporting

At the conclusion of each of the 18 waves, Insightrix produced a report for each message tracking pre-campaign, mid-campaign, and post-campaign message awareness. These reports provided an ongoing view into the campaigns as they were in field.

The IGA was also provided with a message summary report from each of the six messages within the post-campaign reports. These six reports are contained within the appendix.

A midway report was provided to the IGA at the conclusion of the third message summarising the findings to date. This report was provided to the IGA on 15 July 2010.

At the conclusion of the project, Insightrix produced this final report, which includes frequencies such as recall rate, a narrative describing the key findings, gambler classification comparisons, and additional analysis detailing the different gambler types. Where appropriate, results have been compared across waves of research and between gambler types. Detailed data can be found in the Appendix.

RESPONSE RATES

Results were collected from 28 November 2008 to 09 December 2011. A full distribution of all waves and their related base of respondents are detailed on the following page. A total of 5,421 respondents completed the survey. Due to the self-selection bias inherent with online panel research, a margin of error calculation is not applicable. The survey was conducted in English.

Data Collection Launch Dates for Each Wave of Research

Message 1 – Don't chase your losses. Walk away. Gamble responsibly.		
Survey 1- Wave 1	23 November 2008	n=311
Survey 2- Wave 2	26 February 2009	n=303
Survey 3 –Wave 3	29 May 2009	n=301
Message 2 – Don't let the game play you. Stay in control. Gamble responsibly.		
Survey 1- Wave 4	02 June 2009	n=300
Survey 2 – Wave 5	28 August 2009	n=301
Survey 3- Wave 6	28 November 2009	n=300
Message 3- Stay in control. Leave before you lose it. Gamble responsibly.		
Survey 1- Wave 7	01 December 2009	n=303
Survey 2 – Wave 8	26 February 2010	n=300
Survey 3 – Wave 9	29 May 2010	n=300
Message 4- You know the score. Stay in control. Gamble responsibly.		
Survey 1- Wave 10	02 June 2010	n=300
Survey 2- Wave 11	28 August 2010	n=300
Survey 3- Wave 12	28 November 2010	n=300
Message 5- Know when to stop. Don't go over the top. Gamble responsibly.		
Survey 1- Wave 13	01 December 2010	n=300
Survey 2- Wave 14	26 February 2011	n=300
Survey 3 – Wave 15	29 May 2011	n=300
Message 6 - Think of the people who need your support. Gamble responsibly.		
Survey 1- Wave 16	02 June 2011	n=300
Survey 2 –Wave 17	28 August 2011	n=303
Survey 3 – Wave 18	28 November 2011	n=299

Reporting Notes

Pre-campaign vs. Post-campaign Message Awareness

When presented with specific gambling messages in the pre-campaign wave of research, some respondents incorrectly identified that they had heard the expanded messages prior to the message being released in the South Australian market. This may have been caused by a halo effect influenced by other gambling advertising in the market, visits to Queensland while the message was in use, or similar/previous gambling advertisements or messages from the past

as well as the pre campaign usage of the condensed message “Gamble responsibly”. When interpreting the results, the difference between the proportions of pre and post-campaign awareness should be interpreted in the context of the lift each message achieved between waves rather than relative to a baseline awareness of the pre-campaign wave of research.

Weighting of Results

Due to a change in age quotas after project commencement, the first four waves of research were weighted slightly to better reflect the distribution of the South Australian population. Where appropriate, the weighted results by age and gender for these individual waves are reported. Population statistics for South Australia were taken from the Australian Bureau of Statistics census data.

Overall data aggregating all waves of research is presented as unweighted, as the sample size is large enough that weighting is not required.

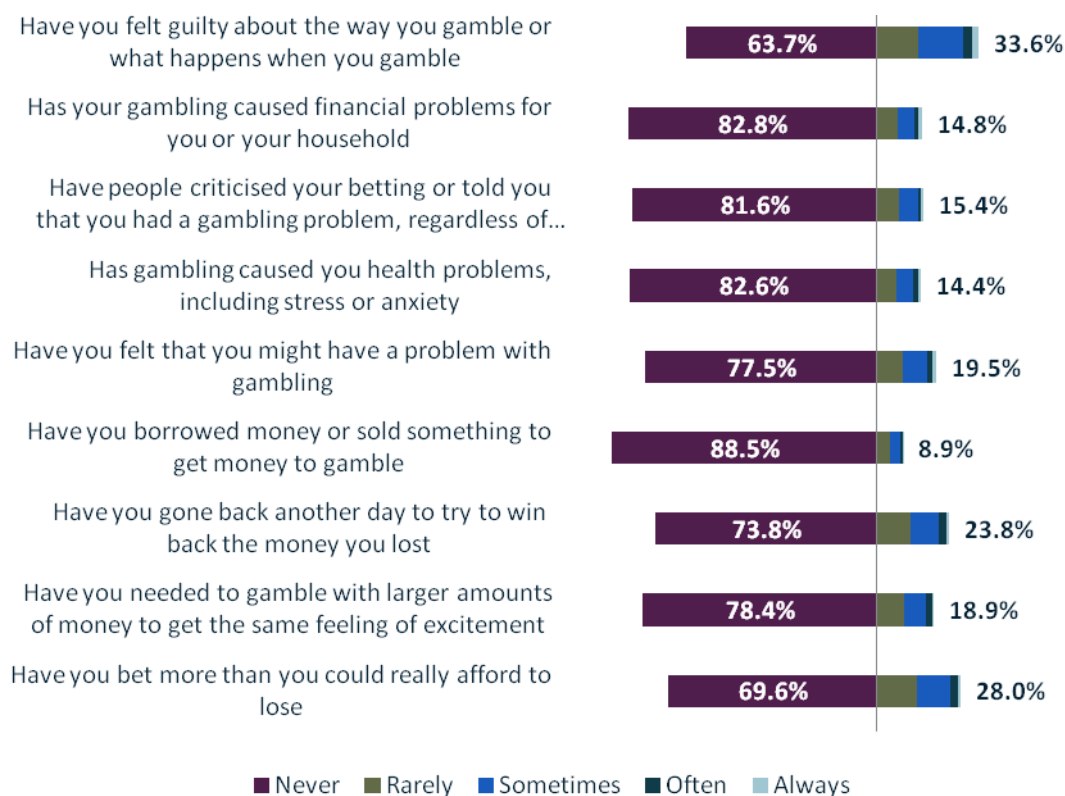
Other Considerations

Each survey question includes a base description (n = #) which details the number and type of respondents who answered each particular question. Open ended questions were themed and coded into common response categories based on similar responses provided by respondents in order to better represent the subject matter being reported. Due to rounding, some charts may not add up to exactly 100%.

Study Results

GAMBLING HABITS

Respondents who gamble at least once a year were asked to detail their typical gambling habits by indicating the frequency with which they associate themselves with a number of statements regarding their gambling. Their answers to these factors were utilised to classify respondents into the different gambler types. While a large proportion of respondents indicate that each of the statements “never” reflects their gambling habits, one third (33.6%) at least rarely have felt guilty about the way they gamble. Three in ten (28.0%) have at least rarely bet more than they could afford to lose, while one quarter (23.8%) have at least rarely gone back another day to try to win back lost money. The full distribution of gambling habit results can be referenced in Appendix C – Tables of Counts.

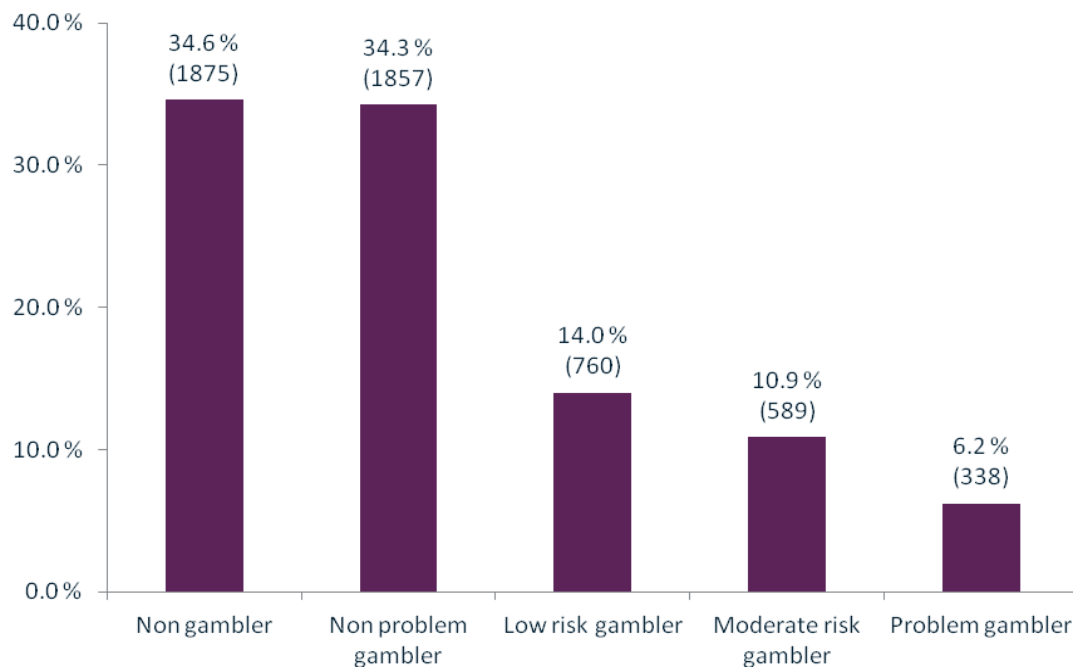


8. In the past 12 months, how often... Base: Respondents who gamble at least once a year, omitting those who “don’t know” or “don’t gamble”, n = 3544.

*A table containing full counts is included in the Appendix.

GAMBLING PROFILES

As noted above, respondents who gamble were asked a series of questions based on their gambling habits in order to assess their gambling risk-level based on the Canadian Problem Gambling Index. They were then put into different groups based on this classification. Overall, one third (34.6%) of respondents are classified as non-gamblers, one third are non-problem gamblers (34.3%), 14.0% are low risk gamblers, 10.9% are moderate risk gamblers and 6.2% are problem gamblers.

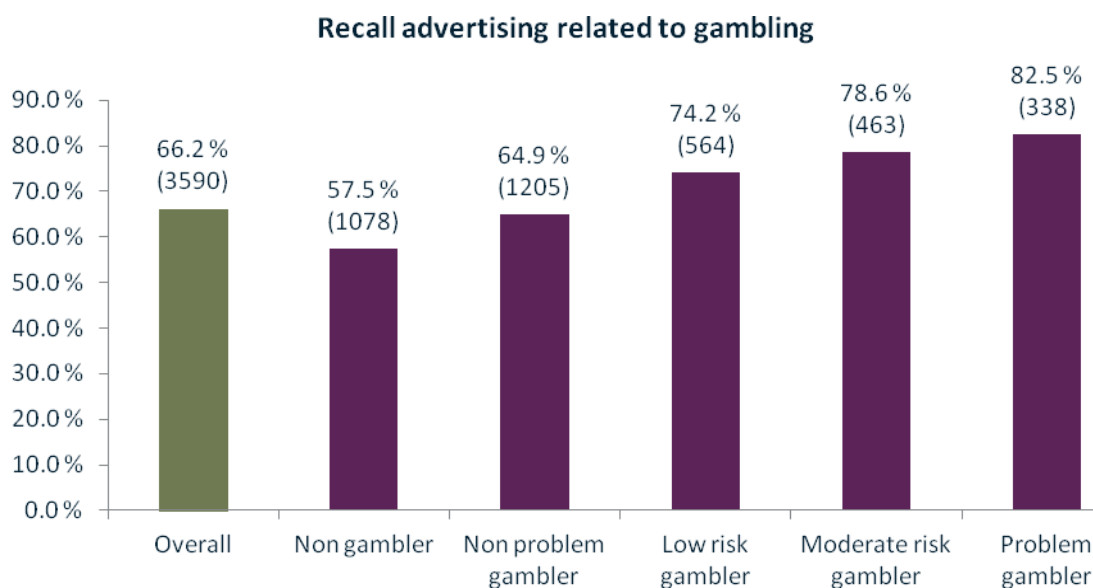


Base: All respondents, n=5421

ADVERTISING RELATED TO GAMBLING

When combining all waves of data together, it is clear that gambling messages are fairly prevalent in the market place. Two thirds (66.2%) of those surveyed indicated that they have seen, read or heard some kind of advertising related to gambling within the six months prior to completing the survey.

Problem gamblers (82.5%) are most likely to recall any advertisements for gambling, while non-gamblers (57.5%) are least likely. Recall rates of gambling advertising increases among the more severe problem gambling classifications.



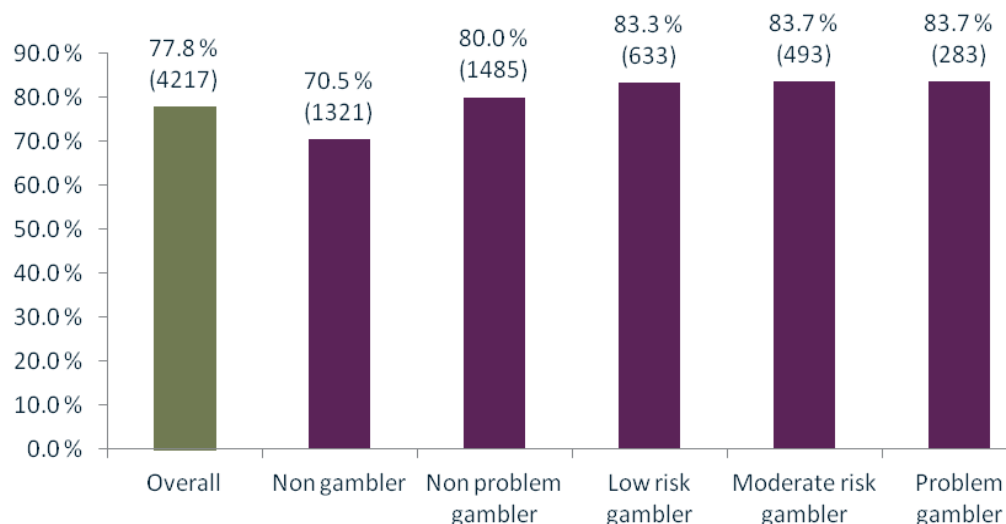
1. Do you recall seeing, reading or hearing any advertising related to gambling within the past 6 months? Base: All respondents, n=5421

“GAMBLE RESPONSIBLY” MESSAGING

After prompting respondents with the condensed message “Gamble responsibly”, the results illustrate that recall rates of this message are quite high. Overall, three quarters (77.8%) of respondents recall having heard this phrase. Non-gamblers are least likely to recall hearing this message (70.5%), while about eight in ten non-problem gamblers (80.0%), low risk gamblers (83.3%), moderate risk gamblers (83.7%), and problem gamblers (83.7%) each recall the “Gamble responsibly” phrase.

Notably, about one in six (16.3%) problem gamblers do not recall or are unsure if they have heard this message.

Recall advertising using "Gamble responsibly"

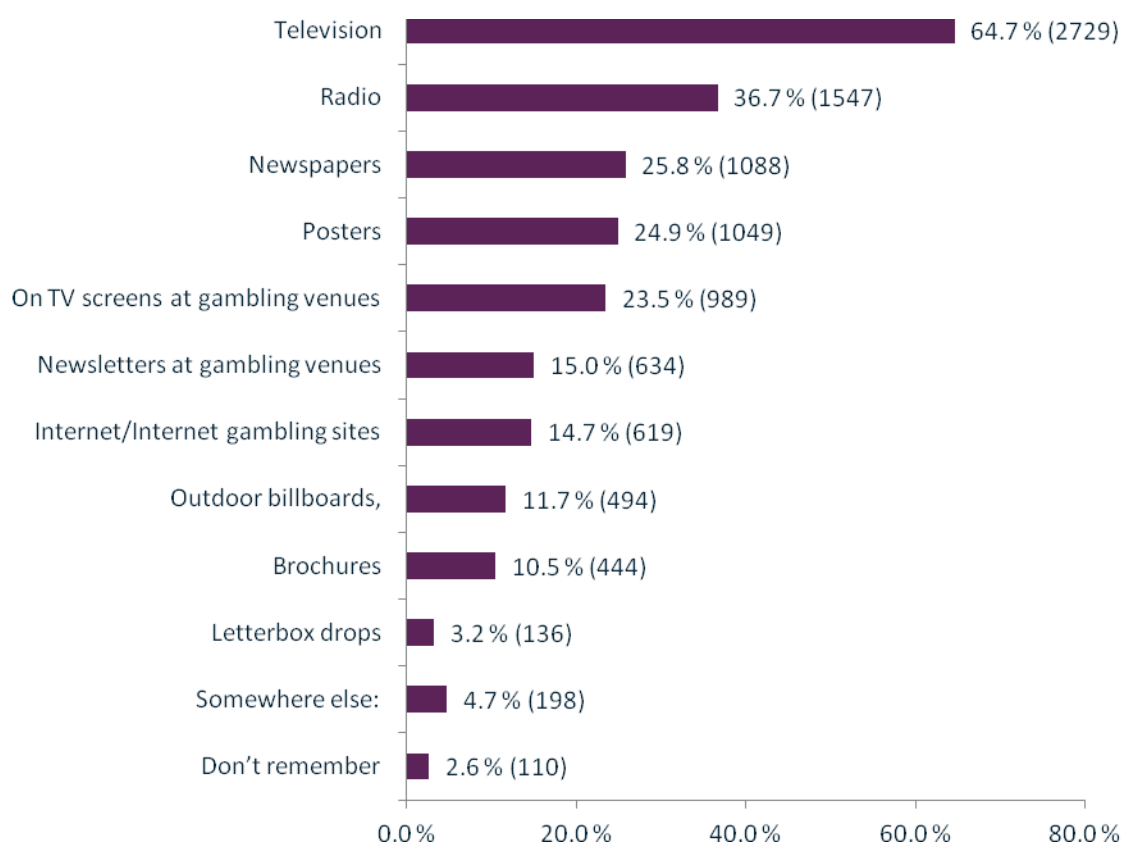


2. Do you remember seeing, reading or hearing any advertising using the phrase "Gamble responsibly"

Base: All respondents, n=5421

MEDIA SOURCE OF MESSAGING

Respondents who recall the “Gamble responsibly” condensed message were asked where they remember seeing, reading or hearing this phrase: two thirds (64.7%) claim that they recall exposure to the “Gamble responsibly” message on television. Over one third (36.7%) claim that they heard the message on the radio, while about one quarter each mention that they have seen the message in newspapers (25.8%), posters (24.9%) or on TV screens at gambling venues (23.5%).



Base: Those who have heard the “Gamble responsibly” message, n=4217
Multiple responses possible so totals exceed 100%.

Problem gamblers are much more likely to have seen the “Gamble responsibly” message in gambling venues, such as on TV screens at these venues (39.9%) or in newsletters (35.7%). Non-gamblers are most likely to have heard the “Gamble responsibly” message on television (66.3%) or on the radio (37.2%).

Media	Non gambler	Non problem gambler	Low risk gambler	Moderate risk gambler	Problem gambler
Television	66.3 %	65.2 %	63.8 %	63.1 %	59.4 %
On TV screens at gambling venues	14.0 %	22.0 %	31.1 %	34.1 %	39.9 %
Newsletters at gambling venues	7.6 %	13.3 %	17.4 %	25.6 %	35.7 %
Posters	20.3 %	23.9 %	28.9 %	31.0 %	31.4 %
Radio	37.2 %	37.2 %	34.9 %	39.8 %	30.0 %
Newspapers	20.7 %	28.5 %	26.9 %	29.4 %	26.9 %
Internet/Internet gambling sites	8.6 %	13.6 %	19.1 %	22.7 %	24.4 %
Brochures	5.6 %	9.3 %	14.8 %	17.6 %	18.0 %
Outdoor billboards	11.0 %	11.3 %	11.5 %	13.6 %	14.5 %
Letterbox drops	1.9 %	2.6 %	4.7 %	4.7 %	7.1 %
Somewhere else	2.5 %	5.8 %	5.2 %	6.1 %	5.7 %
Don't remember	4.5 %	2.3 %	0.9 %	1.6 %	1.1 %

*A table containing full counts is included in the Appendix.

SPECIFIC MESSAGING

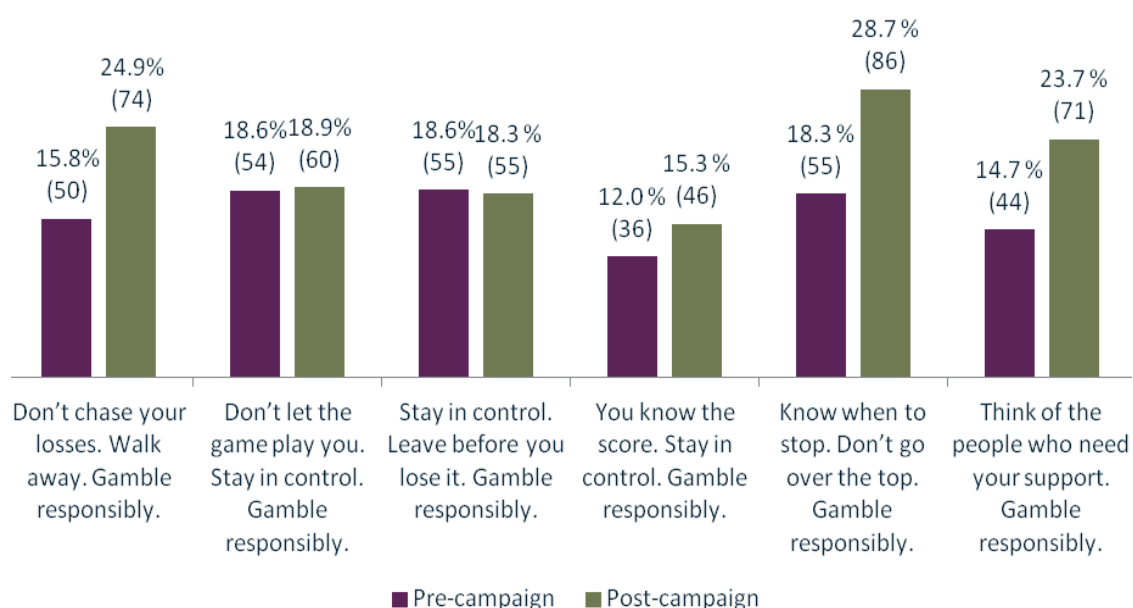
Respondents were asked to state the specific gambling messages they recalled and these statements were coded as correct mentions for the specific message if the respondent was able to closely articulate the meaning of the message, even if they were not able to relate it word-for-word. Even so, very few respondents were able to relate any of the specific expanded warning messages without being prompted with the specific message.

However, when respondents were prompted with the campaign messages, the results throughout the campaign clearly demonstrate a significant increase in recall rates for a number of the messages. Statements for which there are a significant difference between the proportion who claim to recall the message in the pre-campaign and the post-campaign wave include:

- “Don’t chase your losses. Walk away. Gamble responsibly.” – Up 9.1%
- “Know when to stop. Don’t go over the top. Gamble responsibly.” – Up 10.4%
- “Think of the people who need your support.” – Up 9.0%

In addition, a minor lift was achieved for the message “You know the score. Stay in control. Gamble responsibly.”

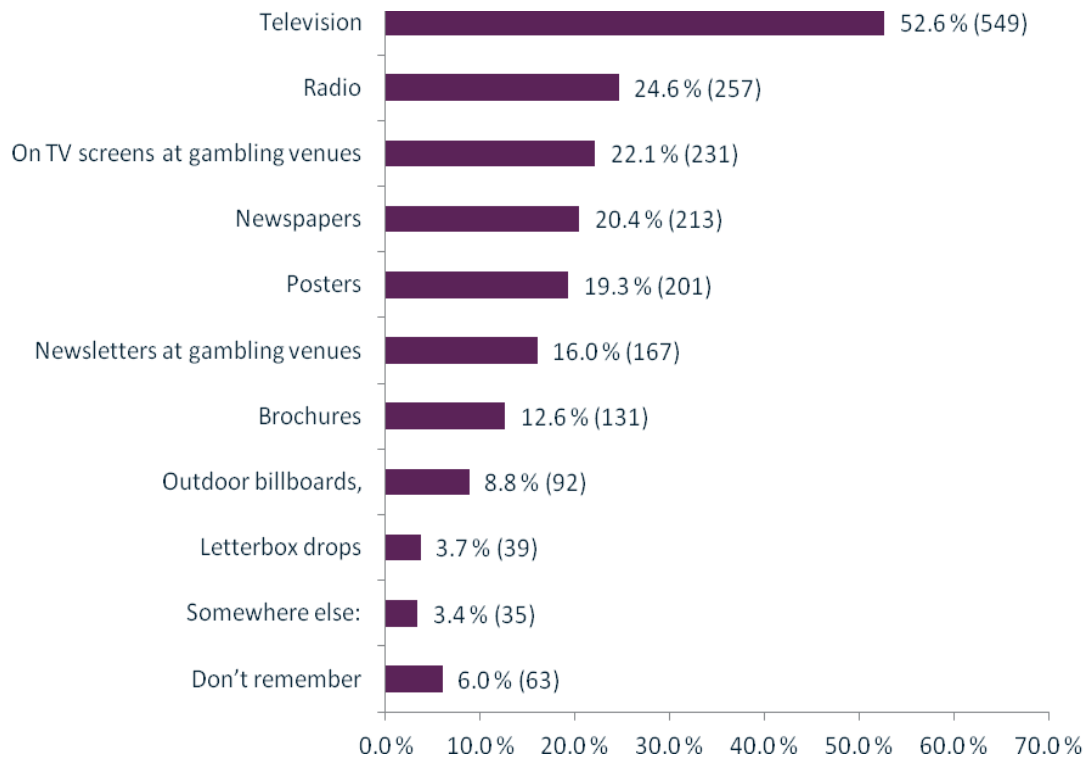
	Don't chase your losses. Walk away. Gamble responsibly.	Don't let the game play you. Stay in control. Gamble responsibly.	Stay in control. Leave before you lose it. Gamble responsibly.	You know the score. Stay in control. Gamble responsibly.	Know when to stop. Don't go over the top. Gamble responsibly.	Think of the people who need your support. Gamble responsibly.
Lift (Post - Pre)	9.1%	0.3%	-0.3%	3.3%	10.4%	9.0%



4. Do you recall seeing, reading or hearing any advertising with the phrase “[insert phrase based on campaign schedule]”
Base: All respondents in each wave, n=299-311

MEDIA SOURCES FOR SPECIFIC CAMPAIGN MESSAGES

Television (52.6%) remains the most common media in which respondents claim to have heard the specific campaign messages. One quarter (24.6%) report hearing the message on the radio, 22.1% on TV screens at gambling venues and 20.4% in newspapers.



Base: Those respondents who recall the messages, n=1043.

Overall, problem gamblers are much more likely to have seen the specific campaign messages in gambling venues, specifically on TV screens at these locations (33.3%) and in newsletters (31.3%).

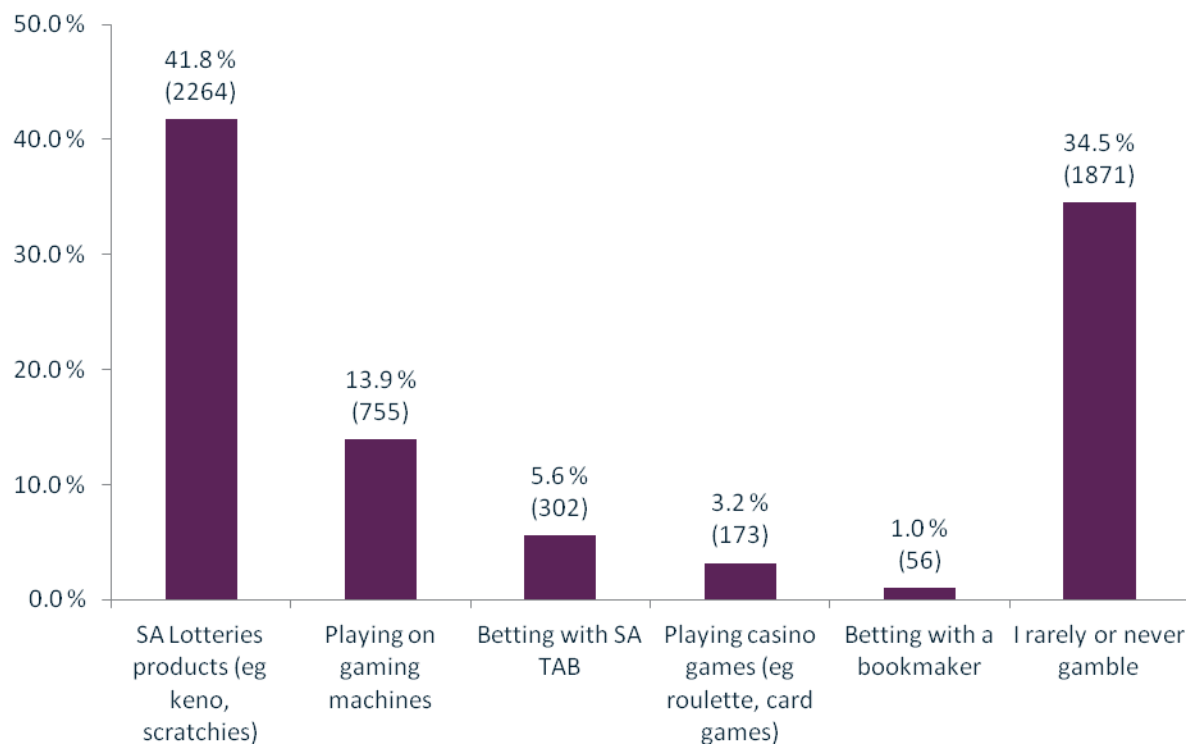
Venue	Non gambler	Non problem gambler	Low risk gambler	Moderate risk gambler	Problem gambler
Television	58.3 %	56.3 %	49.1 %	47.7 %	44.7 %
On TV screens at gambling venues	10.3 %	18.7 %	26.6 %	32.5 %	33.3 %
Newsletters at gambling venues	4.5 %	15.0 %	19.1 %	17.9 %	31.3 %
Radio	25.2 %	22.6 %	28.3 %	21.9 %	26.7 %
Posters	13.2 %	22.0 %	17.3 %	19.9 %	24.7 %
Newspapers	18.2 %	22.3 %	16.8 %	21.9 %	22.7 %
Brochures	7.4 %	11.9 %	11.0 %	20.5 %	16.0 %
Outdoor billboards,	10.7 %	7.3 %	6.9 %	9.3 %	10.7 %
Letterbox drops	2.1 %	3.7 %	4.0 %	3.3 %	6.7 %
Somewhere else:	2.5 %	2.8 %	3.5 %	6.6 %	2.7 %
Don't remember	9.1 %	4.3 %	4.6 %	6.6 %	6.0 %

*A table containing full counts is included in the Appendix.

TYPE OF GAMBLING

Most survey respondents (65.5%) gamble in some form, while one third (34.5%) rarely or never gamble.

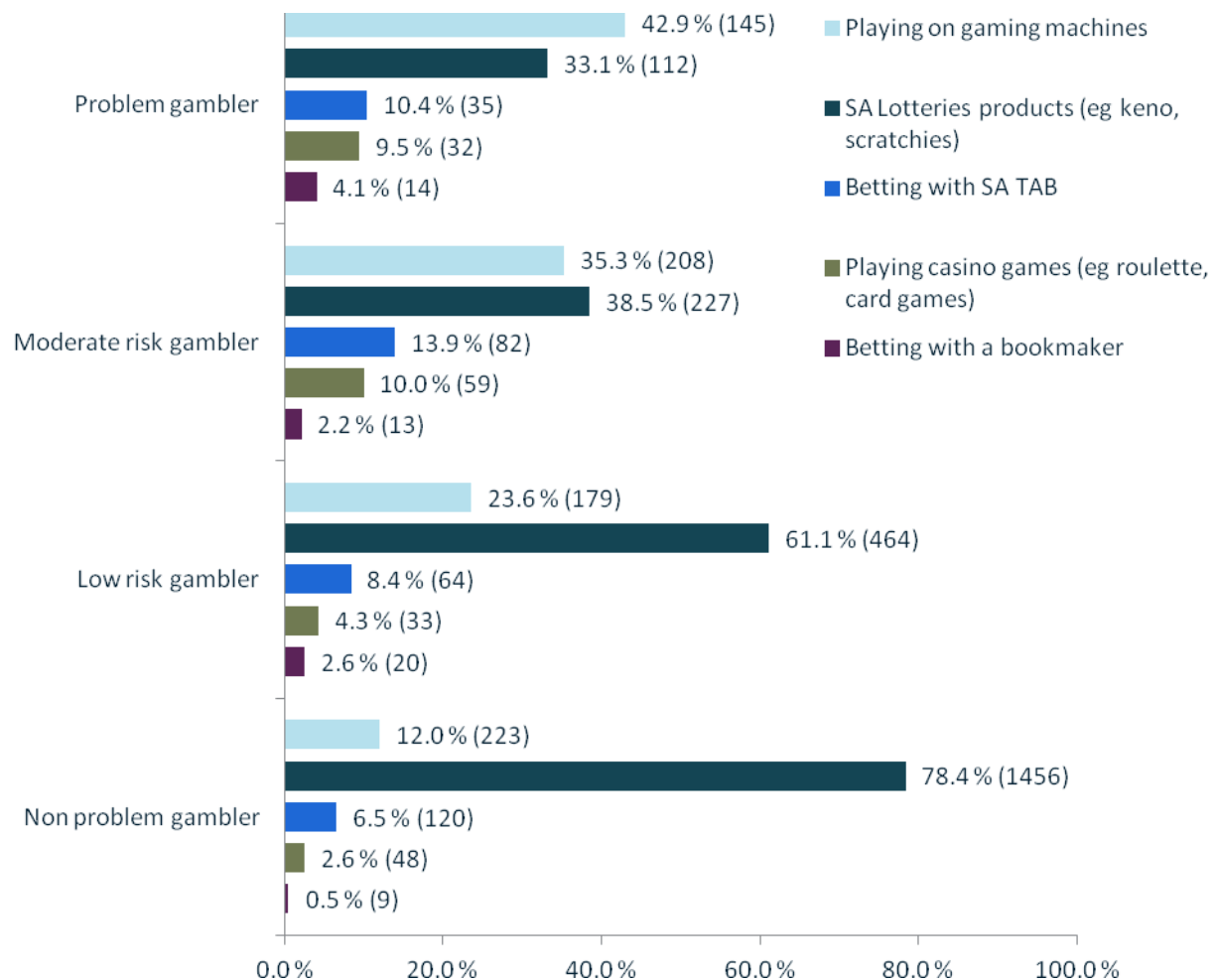
Overall, SA Lotteries products (41.8%) are the most common type of gambling in which respondents participate. About one in seven play on gaming machines (13.9%) most often and fewer than one in ten bet with SA TAB (5.6%), play casino games (3.2%) or bet with a bookmaker (1.0%). Specifics on the locations where respondents most often gamble are contained in the Appendix.



6. If you gamble, what type of gambling do you participate in most often?

Base: All respondents, n=5421

When comparing types of gambling participated in by gambler type, several notable differences emerged in the preferred games that each group plays. Problem gamblers are much more likely to participate in playing on gaming machines (42.9%) than low-risk (23.6%) or non-problem gamblers (12.0%) and are also much less likely to gamble with SA Lotteries products (33.1% vs. 61.1% of low risk gamblers and 78.4% of non-problem gamblers).

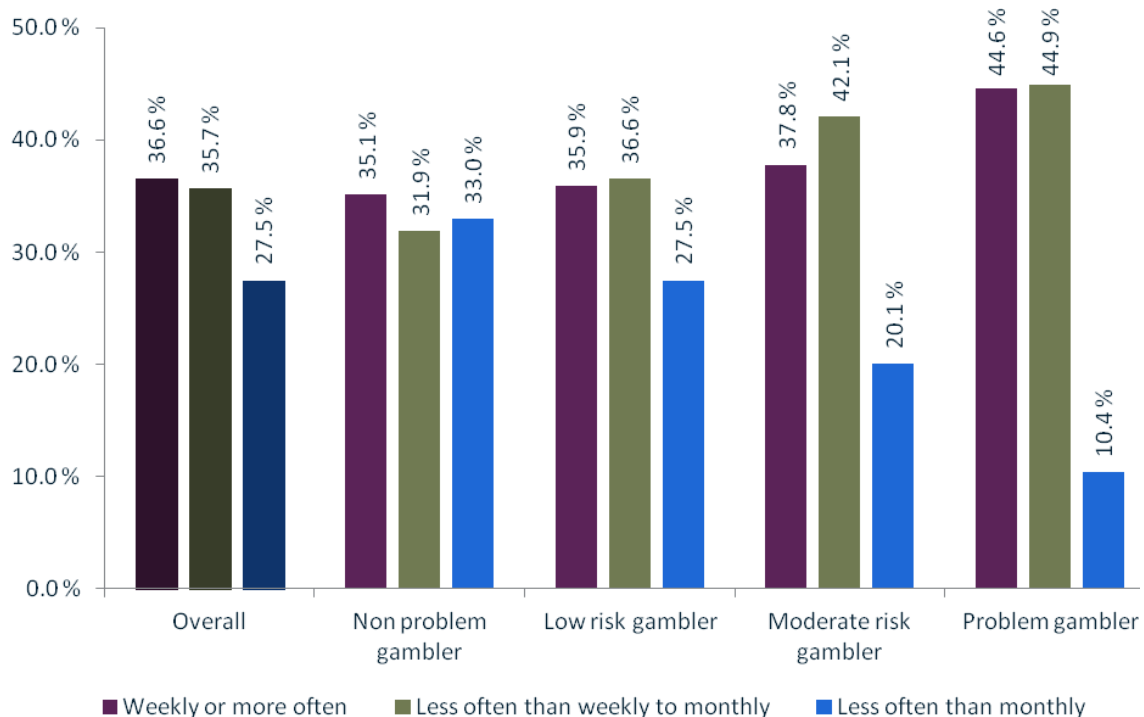


Base: Those respondents who gamble occasionally or more often, n=3550.

FREQUENCY OF GAMBLING

Overall, one third (36.6%) of respondents gamble weekly or more often, about the same proportion (35.7%) gamble less often than weekly to monthly and the remaining 27.5% gamble less often than monthly.

The frequency of gambling is related to gambling risk; higher risk gamblers also tend to gamble with a higher frequency while lower risk gamblers tend to gamble with a lower frequency. Problem gamblers are least likely to gamble less often than monthly (10.4%), while non-problem gamblers commonly (33.0%) gamble this often.



7. How often do you gamble?

Base: Those respondents who gamble occasionally or more often, n=3550.

GAMBLER PROFILES

As described in the methodology, based on their responses to a series of gambling habit questions, respondents received a “problem gambling score” based on the Canadian Problem Gambling Index (CPGI) that rates gambling habits. Questions related to gambling habits included:

- Have you bet more than you could really afford to lose?*
- Have you needed to gamble with larger amounts of money to get the same feeling of excitement?*
- Have you gone back another day to try to win back the money you lost?*
- Have you borrowed money or sold something to get money to gamble?*
- Have you felt that you might have a problem with gambling?*
- Has gambling caused you health problems, including stress or anxiety?*
- Have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?*
- Has your gambling caused financial problems for you or your household?*
- Have you felt guilty about the way you gamble or what happens when you gamble?*

Based on responses to the above questions, respondents were coded into each of the following CPGI gambler types:

- Non-gambler – Do not gamble at all
- Non-problem gambler – Rarely gambles and never represents any of the presented habits
- Low Risk Gambler – Sometimes to rarely gamble, and rarely represents any of the presented habits
- Moderate Risk Gambler – Sometimes to rarely gambling, and sometimes to rarely represent multiple habits.
- Problem Gambler – More frequently gamble, and frequently represent many of the presented habits.

Profiles of each gambler type based on the above definitions along with awareness of each expanded warning message are presented on the following pages.

Problem Gambler

Tend to be:

Younger males

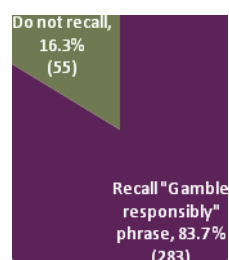
- 24.2% - males 18 to 34 years of age
- 21.8% - males 35 to 54 years of age



Consistent among all education levels

Two-thirds have a household income below \$65,000

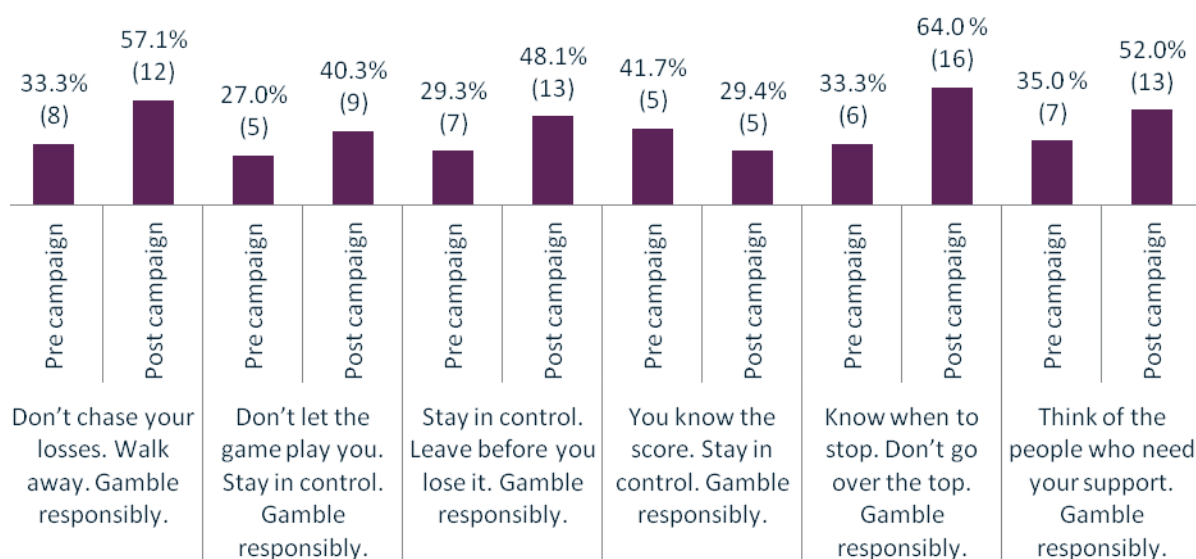
Least likely to be married or de facto (56.2%)



A strong majority (83.7%) of problem gamblers recall advertising with the "Gamble responsibly" message.

Highest recollection of all the presented gambling related messages.

Message Recollection



Non-problem Gambler

Tend to be:

Older males and middle aged females

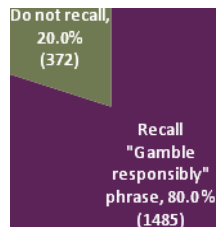
- 24.3% - males 55 years of age or older
- 23.3% - females 35 to 54 years of age

Non-problem gambler, 34.3% (1857)



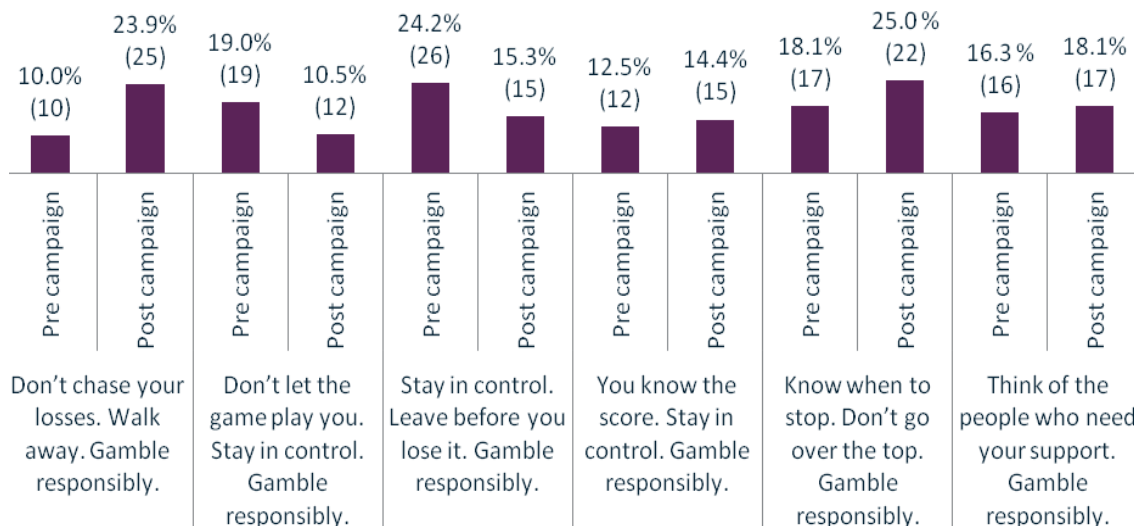
Most likely to be married or de facto (72.7%)

Consistent among all education levels



Strong recollection of “Gamble responsibly” phrase.

Moderate recollection of gambling messages.



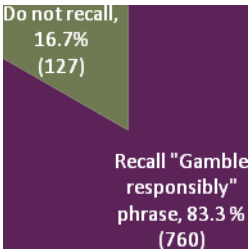
Low Risk Gambler

Tend to be:

Older male

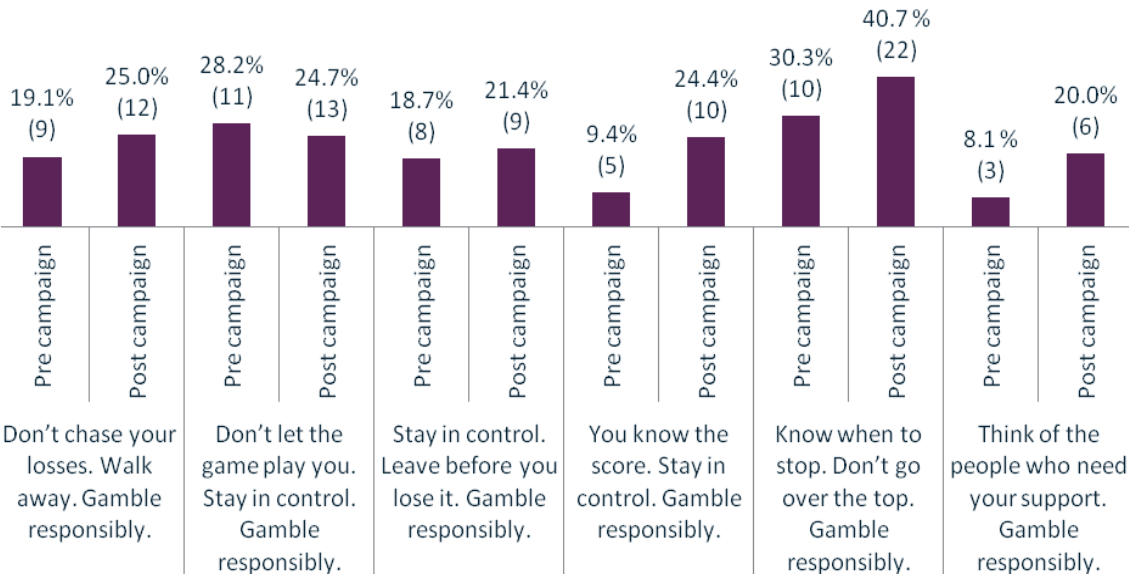
- 23.8% 55 years of age or older

Consistently represented among all education levels



Strong recollection of "Gamble responsibly" phrase (83.3%).

Moderate to strong recollection of gambling messages.

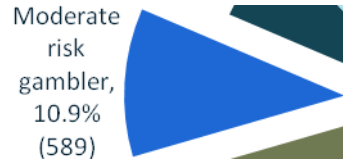


Moderate Risk Gambler

Tend to be:

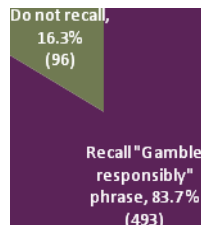
Older and middle aged males

- 22.7% - males 35 to 54 years of age
- 20.4% - males 55 years of age or older



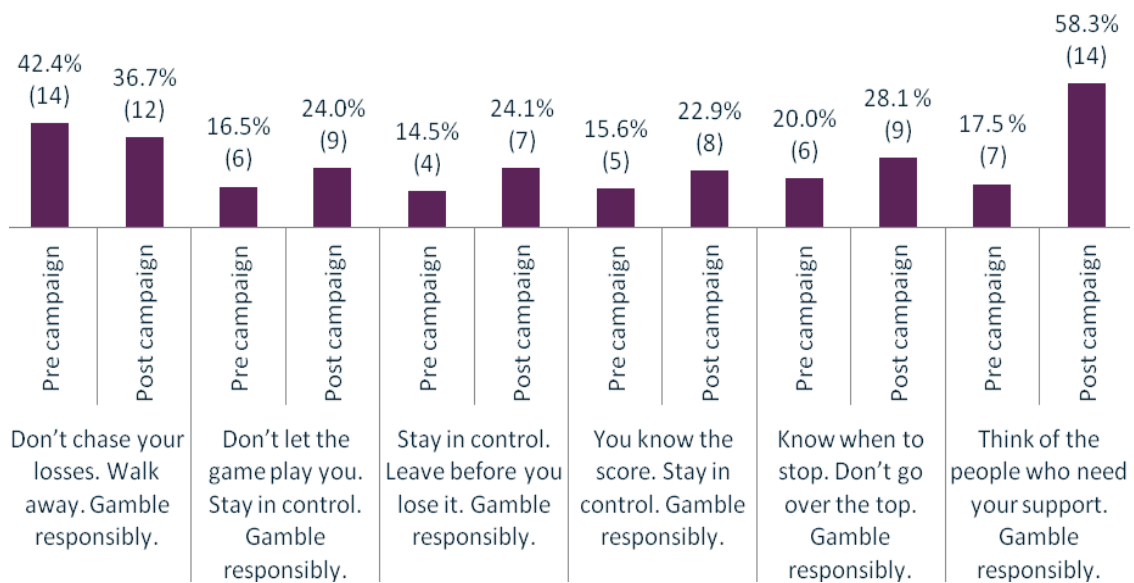
Consistent among all education levels

Nearly two-thirds have a household income below \$65,000



Strong recollection of "Gamble responsibly" phrase (83.7%).

Moderate to strong recollection of gambling messages.



Non-gambler

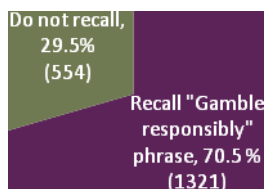
Tend to be:

Younger and middle aged female

- 21.6% females 18 to 34 years of age
- 24.7% females 35 to 54 years of age

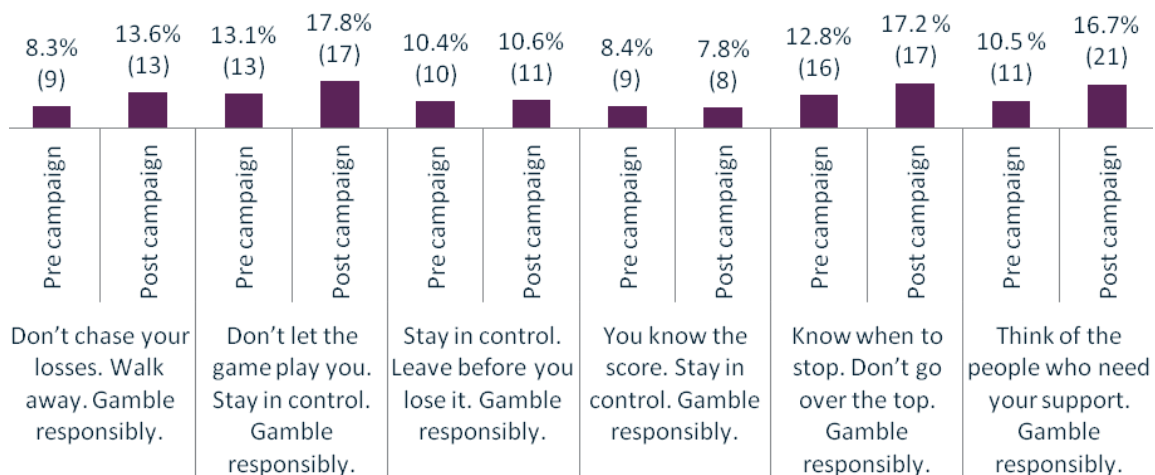
Most likely to have completed a university degree (27.8%)

Non-gambler,
34.6%
(1875)

Strong recollection of "Gamble responsibly" phrase (70.5%). While still strong, this group represents the lowest proportion of recall.

Low recall of gambling messages.



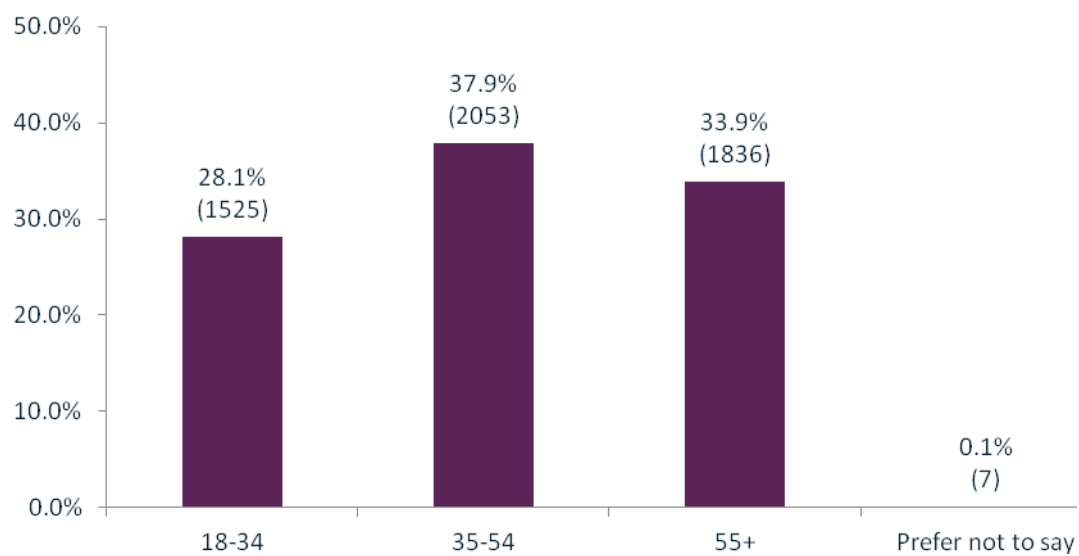
DEMOGRAPHICS

Gender



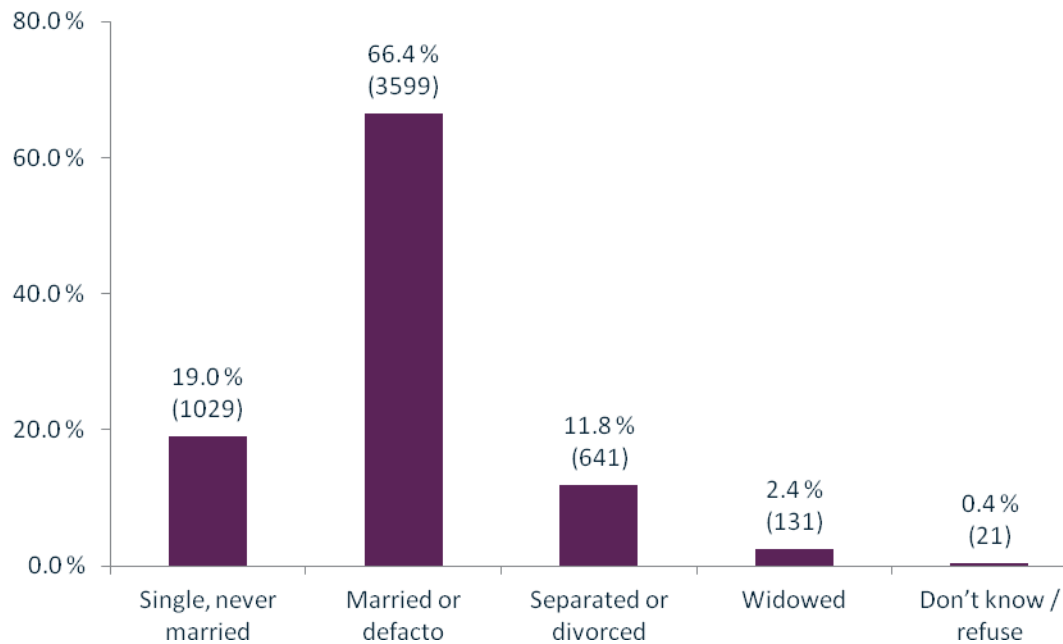
Base: All respondents, n=5421.

Age



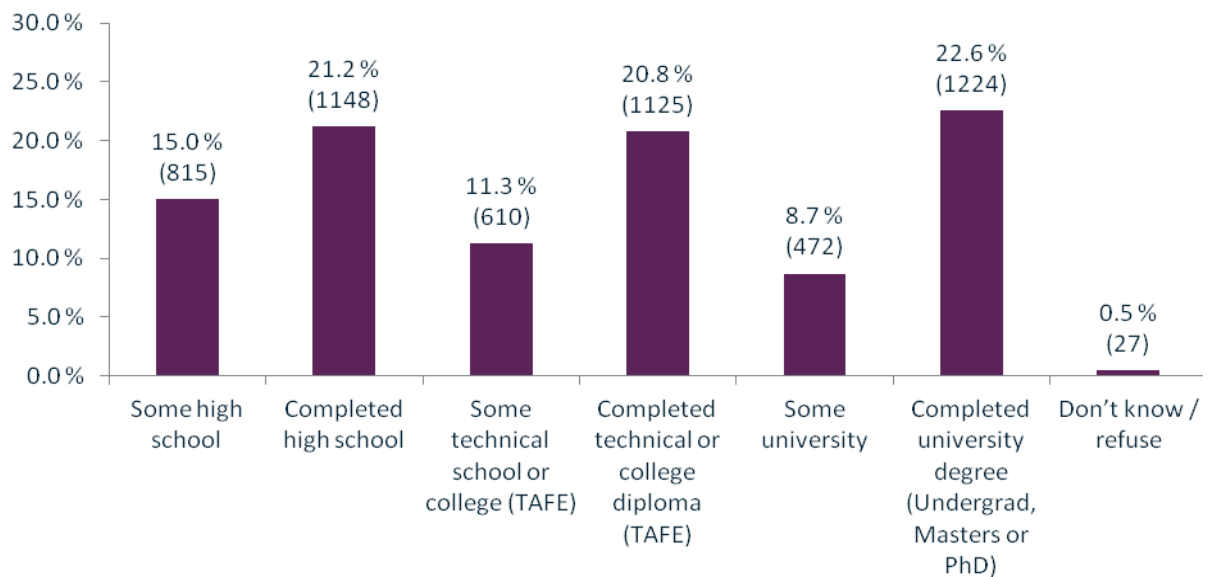
Base: All respondents, n=5421.

Marital Status



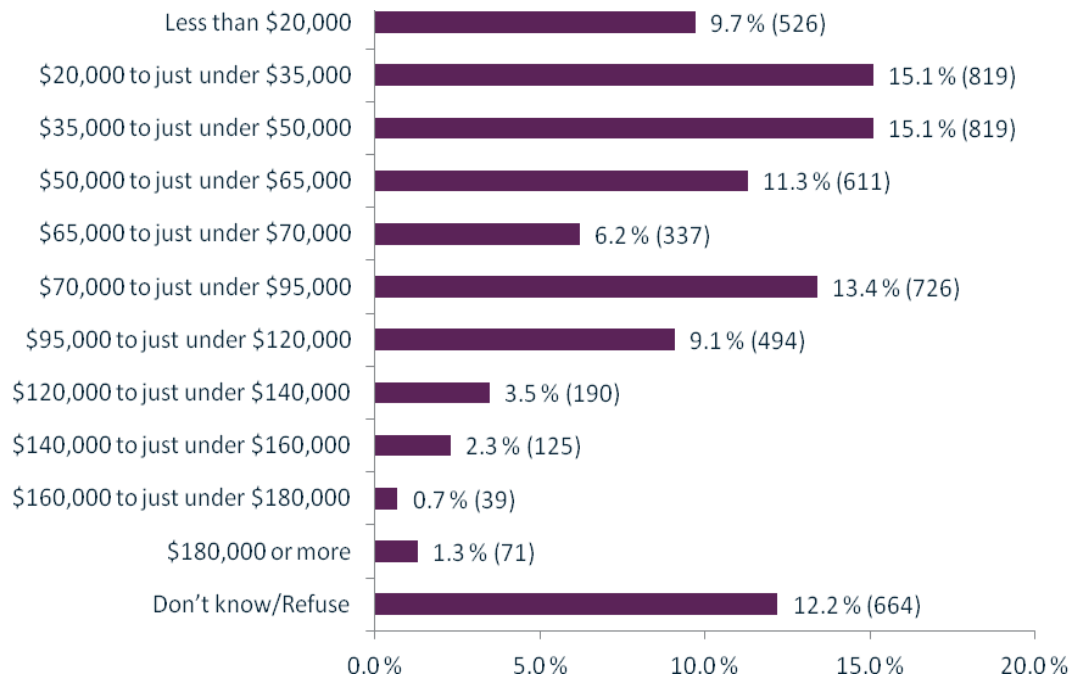
Base: All respondents, n=5421.

Education



Base: All respondents, n=5421.

Income



Base: All respondents, n=5421.

Conclusions

Awareness of the “Gamble responsibly” message is widespread

When asked if they recall any gambling related advertising on an unaided basis, two thirds of respondents (66.2%) recall such advertising. When presented with the phrase Gamble Responsibly, an even stronger proportion of respondents (77.8%) recall seeing, reading or hearing the phrase in advertisements.

Problem gamblers are seeing the messages and have the highest frequency of recall

The results demonstrate that problem gamblers are the most likely type of gamblers to recall seeing both the condensed “Gamble responsibly” message as well as the extended warning messages. Problem gamblers are also most likely to recall that their exposure to the advertising was in a gambling venue. However, more research is required to fully understand whether these messages have caused a change in behaviour on the part of problem gamblers. No change was seen in the proportion of respondents classified as problem gamblers throughout the research, suggesting that problem gamblers continue to make up a consistent proportion of the population.

Several campaign messages achieved a noticeable lift in recall throughout their campaign

The following messages achieved a significant lift when comparing the pre- and post-campaign recall rates:

- “Don’t chase your losses. Walk away. Gamble responsibly.” – Up 9.1%
- “Know when to stop. Don’t go over the top. Gamble responsibly.” – Up 10.4%
- “Think of the people who need your support. Gamble responsibly” – Up 9.0%

Based on this research study we are unable to provide the reasons for the lift of recall. A number of factors could be involved including: the dollar amount spent on each of the campaigns, the campaign’s media usage and reach, consistency of the advertising across all six messages and the target audience of each message campaign. The data is not available to look at any of these factors and their relationship to the respondents’ recall.

Gaming machines appear to attract problem gamblers

Gaming machines and lotteries products are more commonly played by problem gamblers. When asking respondents which type of gaming they participate in most often, problem gamblers are much more likely to play on gaming machines (42.9%) compared to low-risk (23.6%) or non-problem gamblers (12.0%).

Appendix A – Survey Tool

A. Please indicate your gender:

(include male / female images)

Quotas:

Males: 146

Females: 154

B. Into which age range do you fall:

18-34

35-54

55+

Quotas:

18-34: 83

35-54: 112

55+: 105

Quota full message: We're sorry but you do not qualify for our study. Thank you for your interest in participating.

ADVERTISING RECALL MESSAGES

1. Do you recall seeing, reading or hearing any advertising related to gambling within the past 6 months?

Yes

No [skip to Q2]

1a. Please describe the message of the advertising. What specifically did it say? (wording change suggestion)

Text box

2. Do you remember seeing, reading or hearing any advertising using the phrase “Gamble Responsibly”

Yes

No (go to Q4)

Don't remember (go to Q4)

3. Where do you recall seeing, reading or hearing the “Gamble Responsibly” message? (select all that apply)

[randomise order]

Outdoor billboards,

Television

Radio

Newspapers

Newsletters at gambling venues

On TV screens at gambling venues

Posters

Brochures

Letterbox drops

Somewhere else: _____ [always second last]

Don't remember [always last]

4. Do you recall seeing, reading or hearing any advertising with the phrase “[insert phrase based on campaign schedule]”

Yes

No (go to Q6)

Don't remember (go to Q6)

Campaign phrases to insert above: [schedule to be determined]

“Don't chase your losses. Walk away. Gamble responsibly.”

“Don't let the game play you. Stay in control. Gamble responsibly.”

“Stay in control. Leave before you lose it. Gamble responsibly.”

“You know the score. Stay in control. Gamble responsibly.”

“Know when to stop. Don't go over the top. Gamble responsibly.”

“Think of the people who need your support. Gamble responsibly.”

5. Where do you recall seeing, reading or hearing the [insert phrase] message? (select all that apply)

[randomise order]

Outdoor billboards,

Television

Radio

Newspapers

Newsletters at gambling venues

On TV screens at gambling venues

Posters

Brochures

Letterbox drops

Somewhere else: _____ [always second last]

Don't remember [always last]

6. If you gamble, what type of gambling do you participate in most often? [single response]

[randomise order]

Playing on gaming machines [go to 6A]

Playing casino games (eg roulette, card games) [go to Q7]

Betting with SA TAB [go to 6B]

Betting with a bookmaker [go to 6C]

SA Lotteries products (eg keno, scratchies) [go to Q7]

I rarely or never gamble [go to Q9] [always last]

6a. Where do you play gaming machines most often?

hotels

clubs

the casino

6b. How do you place your bets most of the time?

at a SA TAB branch or agency

at the races

by telephone

online

6c. How do you place your bets most of the time?

at the races

by telephone

online

7. How often do you gamble? (gambling includes; bets, lotteries, games of chance)

Daily

Weekly

Every 1-2 weeks

Every 2-4 weeks

Monthly

Every few months

Every six months

Once a year

Never [Go to Q 9]

GAMBLING PROFILE QUESTIONS

The next set of questions are to understand your attitudes towards gambling.

8. In the past 12 months, how often...

[randomise order]

Have you bet more than you could really afford to lose

Have you needed to gamble with larger amounts of money to get the same feeling of excitement

Have you gone back another day to try to win back the money you lost

Have you borrowed money or sold something to get money to gamble

Have you felt that you might have a problem with gambling

Has gambling caused you health problems, including stress or anxiety

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

Has your gambling caused financial problems for you or your household

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

Always

Often

Sometimes

Rarely

Never

Don't know

Don't gamble

Scripting: code gamblers according to the following rules:

Never = 0

Rarely = 1

Sometimes = 1

Often = 2

Always = 3

DK = 0

Refuse = 0

If the sum:

= 0, then non-problem gambler

Between 1 & 2, then low risk gambler

Between 3 and 7, then moderate risk gambler

If greater than 7, the problem gambler

DEMOGRAPHICS

The following set of questions will be used to help analyse your responses. Please be assured your answers will remain confidential.

9. In what year were you born?

Record year

Don't know / refuse

10. What is your marital status?

Single, never married
Married or defacto
Separated or divorced
Widowed
Don't know / refuse

11. What is the highest level of education you have achieved?

Some high school
Completed high school
Some technical school or college (TAFE)
Completed technical or college diploma (TAFE)
Some university
Completed university degree (Undergrad, Masters or PhD)
Don't know / refuse

11b. Do you live in...

Adelaide and surrounding area
other area of South Australia

12. Which of the following best describes your ancestry or background?

Caucasian
Aboriginal or Torres Strait Islander
Asian
Eastern European
Middle Eastern
South American
Indian
African
Other: _____

What is your annual household income before taxes and deductions?

Less than \$20,000
\$20,000 to just under \$35,000
\$35,000 to just under \$50,000
\$50,000 to just under \$65,000
\$65,000 to just under \$70,000
\$70,000 to just under \$95,000
\$95,000 to just under \$120,000
\$120,000 to just under \$140,000
\$140,000 to just under \$160,000
\$160,000 to just under \$180,000
\$180,000 or more
Don't know/Refuse

Appendix B – Canadian Problem Gambler Index

CANADIAN PROBLEM GAMBLING INDEX

A.1. In the last 12 months, have you bet more than you could really afford to lose, would you say never, rarely, sometimes, often or always?

(Single response)

- | | |
|-------------------------------|-----|
| 1. Never | [] |
| 2. Rarely | [] |
| 3. Sometimes | [] |
| 4. Often | [] |
| 5. Always | [] |
| 6. Don't know/ can't remember | [] |
| 7. Refused | [] |

A.2. In the last 12 months, have you needed to gamble with larger amounts of money to get the same feeling of excitement, would you say never, rarely, sometimes, often or always?

(Single response)

- | | |
|-------------------------------|-----|
| 1. Never | [] |
| 2. Rarely | [] |
| 3. Sometimes | [] |
| 4. Often | [] |
| 5. Always | [] |
| 6. Don't know/ can't remember | [] |
| 7. Refused | [] |

A.3. In the last 12 months, when you gambled, did you go back another day to try to win back the money you lost, would you say never, rarely, sometimes, often or always?

(Single response)

- | | |
|-------------------------------|-----|
| 1. Never | [] |
| 2. Rarely | [] |
| 3. Sometimes | [] |
| 4. Often | [] |
| 5. Always | [] |
| 6. Don't know/ can't remember | [] |
| 7. Refused | [] |

A.4. In the last 12 months, have you borrowed money or sold anything to get money to gamble, would you say never, rarely, sometimes, often or always?

(Single response)

- | | | |
|-------------------------------|-----|--|
| 1. Never | [] | |
| 2. Rarely | [] | |
| 3. Sometimes | [] | |
| 4. Often | [] | |
| 5. Always | [] | |
| 6. Don't know/ can't remember | [] | |
| 7. Refused | [] | |

A.5. In the last 12 months, have you felt that you might have a problem with gambling, would you say never, rarely, sometimes, often or always?

(Single response)

- | | | |
|-------------------------------|-----|--|
| 1. Never | [] | |
| 2. Rarely | [] | |
| 3. Sometimes | [] | |
| 4. Often | [] | |
| 5. Always | [] | |
| 6. Don't know/ can't remember | [] | |
| 7. Refused | [] | |

A.6. In the last 12 months, has gambling caused you any health problems, including stress or anxiety, would you say never, rarely, sometimes, often or always?

(Single response)

- | | | |
|-------------------------------|-----|--|
| 1. Never | [] | |
| 2. Rarely | [] | |
| 3. Sometimes | [] | |
| 4. Often | [] | |
| 5. Always | [] | |
| 6. Don't know/ can't remember | [] | |
| 7. Refused | [] | |

A.7. In the last 12 months, have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true, would you say never, rarely, sometimes, often or always?

(Single response)

- | | | |
|-------------------------------|-----|--|
| 1. Never | [] | |
| 2. Rarely | [] | |
| 3. Sometimes | [] | |
| 4. Often | [] | |
| 5. Always | [] | |
| 6. Don't know/ can't remember | [] | |
| 7. Refused | [] | |

A.8. In the last 12 months, has your gambling caused any financial problems for you or your household, would you say never, rarely, sometimes, often or always?

(Single response)

- | | | |
|-------------------------------|-----|-----|
| 1. Never | [] | |
| 2. Rarely | [] | |
| 3. Sometimes | [] | |
| 4. Often | [] | |
| 5. Always | [] | |
| 6. Don't know/ can't remember | [] | [] |
| 7. Refused | [] | |

A.9. In the last 12 months, have you felt guilty about the way you gamble or what happens when you gamble, would you say never, rarely, sometimes, often or always?

(Single response)

- | | | |
|-------------------------------|-----|-----|
| 1. Never | [] | |
| 2. Rarely | [] | |
| 3. Sometimes | [] | |
| 4. Often | [] | |
| 5. Always | [] | |
| 6. Don't know/ can't remember | [] | [] |
| 7. Refused | [] | |

Calculation of CPGI

Non-Problem, Low Risk, Moderate Risk and Problem Gamblers are defined using the following scores for each of the responses to A1 to A9:

Never	0
Rarely	1
Sometimes	1
Often	2
Always	3

Don't know/can't remember 0

Refused 0

If CPGI is equal to 0, then this is a non-problem gambler.

If the CPGI is between 1 and less than 3, then this is a low risk gambler.

If the CPGI is 3 and less 8, then this is a moderate risk gambler.

If the CPGI is between 8 - 27, then this is a problem gambler.

Independent Gambling Authority of South Australia

Appendix

February 10, 2012



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Table of Contents

Appendix C – Tables of Counts	2
Q1. Do you recall seeing, reading or hearing any advertising related to gambling within the past 6 months?.....	2
Q1a. Please describe the message of the advertising. What specifically did it say?	2
Q2. Do you remember seeing, reading or hearing any advertising using the phrase "Gamble responsibly"?.....	4
Q3. Where do you recall seeing, reading or hearing the "Gamble responsibly" message?	4
Q4. Do you recall seeing, reading or hearing any advertising with the phrase?	6
Q5. Where do you recall seeing, reading or hearing the {insert message} message?.....	9
Q6. If you gamble, what type of gambling do you participate in most often?	10
Q6a. Where do you play gaming machines most often?.....	10
Q6b. How do you place your bets most of the time?.....	11
Q6c. How do you place your bets most of the time?.....	11
Q7. How often do you gamble?.....	12
Q8. Gambler Profiles	12
Gender.....	15
Age.....	15
Marital Status	17
Education.....	17
Income	19
Appendix D – Message Summary Reports	21
Message 1 Summary.....	23
“Don’t chase your losses. Walk away. Gamble responsibly.”	23
Message 2 Summary.....	29
“Don’t let the game play you. Stay in control. Gamble responsibly.”	29
Message 3 Summary.....	36
“Stay in control. Leave before you lose it. Gamble responsibly.”	36
Message 4 Summary.....	42
“You know the score. Stay in control. Gamble responsibly.”.....	42
Message 5 Summary.....	48
“Know when to stop. Don’t go over the top. Gamble responsibly.”	48
Summary for Message 6.....	54
“Think of the people who need your support. Gamble responsibly.”	54

Appendix C – Tables of Counts

Q1. DO YOU RECALL SEEING, READING OR HEARING ANY ADVERTISING RELATED TO GAMBLING WITHIN THE PAST 6 MONTHS?

Total:

	Count	Percent
Recall advertising related to gambling	3590	66.2 %
Do not recall advertising related to gambling	1831	33.8 %
Total	5421	100.0 %

By Gambler Type:

	Recall advertising related to gambling		Do not recall advertising related to gambling		Total	
	Count	Percent	Count	Percent	Count	Percent
Non gambler	1078	57.5 %	797	42.5 %	1875	100.0 %
Non problem gambler	1205	64.9 %	652	35.1 %	1857	100.0 %
Low risk gambler	564	74.2 %	196	25.8 %	760	100.0 %
Moderate risk gambler	463	78.6 %	126	21.4 %	589	100.0 %
Problem gambler	279	82.5 %	59	17.5 %	338	100.0 %
Total	3589		1830		5419	100.0 %

Q1A. PLEASE DESCRIBE THE MESSAGE OF THE ADVERTISING. WHAT SPECIFICALLY DID IT SAY?

Total:

Message	Count	Percent
Advertising gambling sites, games, events, promotions, etc.	1633	45.6 %
Help for gambling addiction, Gamblers Anonymous, Gamblers Helpline, anti-gambling promotions	735	20.5 %
Gamble Responsibly	606	16.9 %
Promoting the attractions and advantages of gambling and/or winning	549	15.3 %
Message 1 NET	37	1.0 %
Don't chase your losses	9	0.3 %
Walk Away	12	0.3 %
Stay in Control	20	0.6 %
Don't let the game play you (Message 2)	7	0.2 %
Leave before you lose it (Message 3)	43	1.2 %
You know the score (Message 4)	2	0.1 %
Message 5 NET	40	1.1 %
Know when to stop	32	0.9 %
Don't go over the top	10	0.3 %
Think of the people who need your support (Message 6)	141	3.9 %
Promoting raising money for charities through gambling	5	0.1 %
Reporting the results of lotteries, games, races, bets, etc.	10	0.3 %
Other	143	4.0 %
Don't Know/Can't Remember	245	6.8 %
Total	3582	100.0%

By Gambler Type:

Message	Non gambler		Non-problem gambler		Low risk gambler	
	Count	Percent	Count	Percent	Count	Percent
Advertising gambling sites, games, events, promotions, etc.	470	43.7 %	562	46.7 %	269	47.7 %
Help for gambling addiction, Gamblers Anonymous, Gamblers Helpline, anti-gambling promotions	212	19.7 %	248	20.6 %	113	20.0 %
Gamble Responsibly	179	16.7 %	215	17.9 %	94	16.7 %
Promoting the attractions and advantages of gambling and/or winning	164	15.3 %	181	15.0 %	95	16.8 %
Message 1 NET	15	1.4 %	6	0.5 %	8	1.4 %
Don't chase your losses	1	0.1 %	2	0.2 %	4	0.7 %
Walk Away	6	0.6 %	1	0.1 %	2	0.4 %
Stay in Control	8	0.7 %	3	0.2 %	5	0.9 %
Don't let the game play you (Message 2)	3	0.3 %	1	0.1 %	0	0.0 %
Leave before you lose it (Message 3)	8	0.7 %	11	0.9 %	10	1.8 %
You know the score (Message 4)	0	0.0 %	1	0.1 %	1	0.2 %
Message 5 NET	9	0.8 %	15	1.2 %	4	0.7 %
Know when to stop	7	0.7 %	11	0.9 %	4	0.7 %
Don't go over the top	2	0.2 %	6	0.5 %	0	0.0 %
Think of the people who need your support (Message 6)	44	4.1 %	53	4.4 %	20	3.5 %
Promoting raising money for charities through gambling	2	0.2 %	2	0.2 %	0	0.0 %
Reporting the results of lotteries, games, races, bets, etc.	4	0.4 %	4	0.3 %	1	0.2 %
Other	45	4.2 %	48	4.0 %	20	3.5 %
Don't Know/Can't Remember	93	8.7 %	75	6.2 %	31	5.5 %
Total	1075		1203		564	

Message	Moderate risk gambler		Problem gambler		Total	
	Count	Percent	Count	Percent	Count	Percent
Advertising gambling sites, games, events, promotions, etc.	218	47.3 %	114	41.0 %	1633	45.6 %
Help for gambling addiction, Gamblers Anonymous, Gamblers Helpline, anti-gambling promotions	100	21.7 %	61	21.9 %	735	20.5 %
Gamble Responsibly	75	16.3 %	43	16.3 %	606	16.9 %
Promoting the attractions and advantages of gambling and/or winning	66	14.3 %	43	15.5 %	549	15.3 %
Message 1 NET	6	1.3 %	2	0.7 %	37	1.0 %
Don't chase your losses	0	0.0 %	2	0.7 %	9	0.3 %
Walk Away	3	0.7 %	0	0.0 %	12	0.3 %
Stay in Control	4	0.9 %	0	0.0 %	20	0.6 %
Don't let the game play you (Message 2)	3	0.7 %	0	0.0 %	7	0.2 %
Leave before you lose it (Message 3)	11	2.4 %	3	1.1 %	43	1.2 %
You know the score (Message 4)	0	0.0 %	0	0.0 %	2	0.1 %
Message 5 NET	6	1.3 %	6	2.2 %	40	1.1 %
Know when to stop	5	1.1 %	5	1.8 %	32	0.9 %
Don't go over the top	1	0.2 %	1	0.4 %	10	0.3 %
Think of the people who need your support (Message 6)	15	3.3 %	9	3.2 %	141	3.9 %
Promoting raising money for charities through gambling	0	0.0 %	1	0.4 %	5	0.1 %
Reporting the results of lotteries, games, races, bets,	1	0.2 %	0	0.0 %	10	0.3 %

etc.						
Other	15	3.3 %	15	5.4 %	143	4.0 %
Don't Know/Can't Remember	26	5.6 %	20	7.2 %	245	6.8 %
Total	461		278		3582	100.0 %

Q2. DO YOU REMEMBER SEEING, READING OR HEARING ANY ADVERTISING USING THE PHRASE "GAMBLE RESPONSIBLY"?

Total:

	Count	Percent
Recall "Gamble responsibly" phrase	4217	77.8 %
Do not recall "Gamble responsibly" phrase	612	11.3 %
Don't remember	592	10.9 %
Total	5421	100.0 %

By Gambler Type:

	Recall "Gamble responsibly" phrase		Do not recall "Gamble responsibly" phrase		Don't remember		Total	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Non gambler	1321	70.5 %	295	15.7 %	259	13.8 %	1875	100.0 %
Non problem gambler	1485	80.0 %	195	10.5 %	177	9.5 %	1857	100.0 %
Low risk gambler	633	83.3 %	45	5.9 %	82	10.8 %	760	100.0 %
Moderate risk gambler	493	83.7 %	44	7.5 %	52	8.8 %	589	100.0 %
Problem gambler	283	83.7 %	33	9.8 %	22	6.5 %	338	100.0 %
Total	4215		612		592		5419	100.0 %

Q3. WHERE DO YOU RECALL SEEING, READING OR HEARING THE "GAMBLE RESPONSIBLY" MESSAGE?

Total:

Venue	Count	Percent
Outdoor billboards,	494	11.7 %
Television	2729	64.7 %
Radio	1547	36.7 %
Newspapers	1088	25.8 %
Newsletters at gambling venues	634	15.0 %
On TV screens at gambling venues	989	23.5 %
Posters	1049	24.9 %
Brochures	444	10.5 %
Letterbox drops	136	3.2 %
Internet/Internet gambling sites	619	14.7 %
Somewhere else:	198	4.7 %
Don't remember	110	2.6 %
Total	4217	100.0 %

By Gambler Type:

	Non gambler		Non-problem gambler		Low risk gambler	
Venue	Count	Percent	Count	Percent	Count	Percent
Television	876	66.3 %	968	65.2 %	404	63.8 %
On TV screens at gambling venues	185	14.0 %	326	22.0 %	197	31.1 %
Newsletters at gambling venues	100	7.6 %	197	13.3 %	110	17.4 %
Posters	268	20.3 %	355	23.9 %	183	28.9 %
Radio	491	37.2 %	552	37.2 %	221	34.9 %
Newspapers	273	20.7 %	423	28.5 %	170	26.9 %
Internet/Internet gambling sites	114	8.6 %	202	13.6 %	121	19.1 %
Brochures	74	5.6 %	138	9.3 %	94	14.8 %
Outdoor billboards,	145	11.0 %	168	11.3 %	73	11.5 %
Letterbox drops	25	1.9 %	38	2.6 %	30	4.7 %
Somewhere else:	33	2.5 %	86	5.8 %	33	5.2 %
Don't remember	59	4.5 %	34	2.3 %	6	0.9 %
Total	1321		1485		633	

	Moderate risk gambler		Problem gambler		Total	
Venue	Count	Percent	Count	Percent	Count	Percent
Television	311	63.1 %	168	59.4 %	479	11.4 %
On TV screens at gambling venues	168	34.1 %	113	39.9 %	281	6.7 %
Newsletters at gambling venues	126	25.6 %	101	35.7 %	227	5.4 %
Posters	153	31.0 %	89	31.4 %	242	5.7 %
Radio	196	39.8 %	85	30.0 %	281	6.7 %
Newspapers	145	29.4 %	76	26.9 %	221	5.2 %
Internet/Internet gambling sites	112	22.7 %	69	24.4 %	181	4.3 %
Brochures	87	17.6 %	51	18.0 %	138	3.3 %
Outdoor billboards,	67	13.6 %	41	14.5 %	108	2.6 %
Letterbox drops	23	4.7 %	20	7.1 %	43	1.0 %
Somewhere else:	30	6.1 %	16	5.7 %	46	1.1 %
Don't remember	8	1.6 %	3	1.1 %	11	0.3 %
Total	493		283		4217	100.0 %

Q4. DO YOU RECALL SEEING, READING OR HEARING ANY ADVERTISING WITH THE PHRASE?

Total:

Message		Count	Percent
Don't chase your losses. Walk away. Gamble responsibly.	Pre-campaign	50	15.8%
	Post-campaign	74	24.9%
Don't let the game play you. Stay in control. Gamble responsibly.	Pre-campaign	54	18.6%
	Post-campaign	60	18.9%
Stay in control. Leave before you lose it. Gamble responsibly.	Pre-campaign	55	18.6%
	Post-campaign	55	18.3%
You know the score. Stay in control. Gamble responsibly.	Pre-campaign	36	12.0%
	Post-campaign	46	15.3%
Know when to stop. Don't go over the top. Gamble responsibly.	Pre-campaign	55	18.3%
	Post-campaign	86	28.7%
Think of the people who need your support. Gamble responsibly.	Pre-campaign	44	14.7%
	Post-campaign	71	23.7%

By Gambler Type:

Problem gambler			
Message		Count	Percent
Don't chase your losses. Walk away. Gamble responsibly.	Pre campaign	8	33.3%
	Post campaign	12	57.1%
Don't let the game play you. Stay in control. Gamble responsibly.	Pre campaign	5	27.0%
	Post campaign	9	40.3%
Stay in control. Leave before you lose it. Gamble responsibly.	Pre campaign	7	29.3%
	Post campaign	13	48.1%
You know the score. Stay in control. Gamble responsibly.	Pre campaign	5	41.7%
	Post campaign	5	29.4%
Know when to stop. Don't go over the top. Gamble responsibly.	Pre campaign	6	33.3%
	Post campaign	16	64.0 %
Think of the people who need your support. Gamble responsibly.	Pre campaign	7	35.0 %
	Post campaign	13	52.0%

Moderate risk gambler			
Message		Count	Percent
Don't chase your losses. Walk away. Gamble responsibly.	Pre campaign	14	42.4%
	Post campaign	12	36.7%
Don't let the game play you. Stay in control. Gamble responsibly.	Pre campaign	6	16.5%
	Post campaign	9	24.0%
Stay in control. Leave before you lose it. Gamble responsibly.	Pre campaign	4	14.5%
	Post campaign	7	24.1%
You know the score. Stay in control. Gamble responsibly.	Pre campaign	5	15.6%
	Post campaign	8	22.9%
Know when to stop. Don't go over the top. Gamble responsibly.	Pre campaign	6	20.0%
	Post campaign	9	28.1 %
Think of the people who need your support. Gamble responsibly.	Pre campaign	7	17.5 %
	Post campaign	14	58.3%

Low risk gambler			
Message		Count	Percent
Don't chase your losses. Walk away. Gamble responsibly.	Pre campaign	9	19.1%
	Post campaign	12	25.0%
Don't let the game play you. Stay in control. Gamble responsibly.	Pre campaign	11	28.2%
	Post campaign	13	24.7%
Stay in control. Leave before you lose it. Gamble responsibly.	Pre campaign	8	18.7%
	Post campaign	9	21.4%
You know the score. Stay in control. Gamble responsibly.	Pre campaign	5	9.4%
	Post campaign	10	24.4%
Know when to stop. Don't go over the top. Gamble responsibly.	Pre campaign	10	30.3%
	Post campaign	22	40.7 %
Think of the people who need your support. Gamble responsibly.	Pre campaign	3	8.1 %
	Post campaign	6	20.0%

Non-problem gambler			
Message		Count	Percent
Don't chase your losses. Walk away. Gamble responsibly.	Pre campaign	10	10.0%
	Post campaign	25	23.9%
Don't let the game play you. Stay in control. Gamble responsibly.	Pre campaign	19	19.0%
	Post campaign	12	10.5%
Stay in control. Leave before you lose it. Gamble responsibly.	Pre campaign	26	24.2%
	Post campaign	15	15.3%
You know the score. Stay in control. Gamble responsibly.	Pre campaign	12	12.5%
	Post campaign	15	14.4%
Know when to stop. Don't go over the top. Gamble responsibly.	Pre campaign	17	18.1%
	Post campaign	22	25.0 %
Think of the people who need your support. Gamble responsibly.	Pre campaign	16	16.3 %
	Post campaign	17	18.1%

Non gambler			
Message		Count	Percent
Don't chase your losses. Walk away. Gamble responsibly.	Pre campaign	9	8.3%
	Post campaign	13	13.6%
Don't let the game play you. Stay in control. Gamble responsibly.	Pre campaign	13	13.1%
	Post campaign	17	17.8%
Stay in control. Leave before you lose it. Gamble responsibly.	Pre campaign	10	10.4%
	Post campaign	11	10.6%
You know the score. Stay in control. Gamble responsibly.	Pre campaign	9	8.4%
	Post campaign	8	7.8%
Know when to stop. Don't go over the top. Gamble responsibly.	Pre campaign	16	12.8%
	Post campaign	17	17.2 %
Think of the people who need your support. Gamble responsibly.	Pre campaign	11	10.5 %
	Post campaign	21	16.7%

Q5. WHERE DO YOU RECALL SEEING, READING OR HEARING THE {INSERT MESSAGE} MESSAGE?

Total:

Venue	Count	Percent
Outdoor billboards,	92	8.8 %
Television	549	52.6 %
Radio	257	24.6 %
Newspapers	213	20.4 %
Newsletters at gambling venues	167	16.0 %
On TV screens at gambling venues	231	22.1 %
Posters	201	19.3 %
Brochures	131	12.6 %
Letterbox drops	39	3.7 %
Somewhere else:	35	3.4 %
Don't remember	63	6.0 %
Total	1043	100.0 %

By Gambler Type:

Venue	Non gambler		Non problem gambler		Low risk gambler	
	Count	Percent	Count	Percent	Count	Percent
Outdoor billboards,	26	10.7 %	24	7.3 %	12	6.9 %
Television	141	58.3 %	184	56.3 %	85	49.1 %
Radio	61	25.2 %	74	22.6 %	49	28.3 %
Newspapers	44	18.2 %	73	22.3 %	29	16.8 %
Newsletters at gambling venues	11	4.5 %	49	15.0 %	33	19.1 %
On TV screens at gambling venues	25	10.3 %	61	18.7 %	46	26.6 %
Posters	32	13.2 %	72	22.0 %	30	17.3 %
Brochures	18	7.4 %	39	11.9 %	19	11.0 %
Letterbox drops	5	2.1 %	12	3.7 %	7	4.0 %
Somewhere else:	6	2.5 %	9	2.8 %	6	3.5 %
Don't remember	22	9.1 %	14	4.3 %	8	4.6 %
Total	242	100.0 %	327	100.0 %	173	100.0 %

Venue	Moderate risk gambler		Problem gambler		Total	
	Count	Percent	Count	Percent	Count	Percent
Outdoor billboards,	14	9.3 %	16	10.7 %	92	8.8 %
Television	72	47.7 %	67	44.7 %	549	52.6 %
Radio	33	21.9 %	40	26.7 %	257	24.6 %
Newspapers	33	21.9 %	34	22.7 %	213	20.4 %
Newsletters at gambling venues	27	17.9 %	47	31.3 %	167	16.0 %
On TV screens at gambling venues	49	32.5 %	50	33.3 %	231	22.1 %
Posters	30	19.9 %	37	24.7 %	201	19.3 %
Brochures	31	20.5 %	24	16.0 %	131	12.6 %
Letterbox drops	5	3.3 %	10	6.7 %	39	3.7 %
Somewhere else:	10	6.6 %	4	2.7 %	35	3.4 %
Don't remember	10	6.6 %	9	6.0 %	63	6.0 %
Total	151	100.0 %	150	100.0 %	1043	100.0 %

Q6. IF YOU GAMBLE, WHAT TYPE OF GAMBLING DO YOU PARTICIPATE IN MOST OFTEN?

Total:

	Count	Percent
Playing on gaming machines	755	13.9 %
Playing casino games (e.g. roulette, card games)	173	3.2 %
Betting with SA TAB	302	5.6 %
Betting with a bookmaker	56	1.0 %
SA Lotteries products (e.g. keno, scratchies)	2264	41.8 %
I rarely or never gamble	1871	34.5 %
Total	5421	100.0 %

By Gambler Type:

	Non problem gambler		Low risk gambler		Moderate risk gambler	
	Count	Percent	Count	Percent	Count	Percent
Playing on gaming machines	223	12.0 %	179	23.6 %	208	35.3 %
Playing casino games (e.g. roulette, card games)	48	2.6 %	33	4.3 %	59	10.0 %
Betting with SA TAB	120	6.5 %	64	8.4 %	82	13.9 %
Betting with a bookmaker	9	0.5 %	20	2.6 %	13	2.2 %
SA Lotteries products (e.g. keno, scratchies)	1456	78.4 %	464	61.1 %	227	38.5 %
I rarely or never gamble	1	0.1 %	0	0.0 %	0	0.0 %
Total	1857	100.0 %	760	100.0 %	589	100.0 %

	Problem gambler		Non gambler		Total	
	Count	Percent	Count	Percent	Count	Percent
Playing on gaming machines	145	42.9 %	0	0.0 %	755	13.9 %
Playing casino games (eg roulette, card games)	32	9.5 %	1	0.1 %	173	3.2 %
Betting with SA TAB	35	10.4 %	1	0.1 %	302	5.6 %
Betting with a bookmaker	14	4.1 %	0	0.0 %	56	1.0 %
SA Lotteries products (eg keno, scratchies)	112	33.1 %	4	0.2 %	2264	41.8 %
I rarely or never gamble	0	0.0 %	1869	99.7 %	1871	34.5 %
Total	338	100.0 %	1875	100.0 %	5421	100.0 %

Q6A. WHERE DO YOU PLAY GAMING MACHINES MOST OFTEN?

Total:

Venue	Count	Percent
Hotels	591	78.3%
Clubs	85	11.3%
The casino	79	10.5%
Total	755	100.0%

By Gambler Type:

	Non problem gambler		Low risk gambler		Moderate risk gambler		Problem gambler		Total	
Venue	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Hotels	176	78.9 %	132	73.7 %	164	78.8 %	119	82.1 %	591	78.3 %
Clubs	25	11.2 %	24	13.4 %	22	10.6 %	14	9.7 %	85	11.3 %
The casino	22	9.9 %	23	12.8 %	22	10.6 %	12	8.3 %	79	10.5 %
Total	223	100.0 %	179	100.0 %	208	100.0 %	145	100.0 %	755	100.0 %

Q6B. HOW DO YOU PLACE YOUR BETS MOST OF THE TIME?

Total:

Method	Count	Percent
At a SA TAB branch or agency	176	58.3%
At the races	22	7.3%
By telephone	18	6.0%
Online	86	28.5%
Total	302	100.0%

By Gambler Type:

	Non problem gambler		Low risk gambler		Moderate risk gambler		Problem gambler		Total	
Method	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
At a SA TAB branch or agency	67	55.8 %	39	60.9 %	50	61.0 %	20	57.1 %	176	58.3 %
At the races	12	10.0 %	5	7.8 %	2	2.4 %	2	5.7 %	22	7.3 %
By telephone	6	5.0 %	4	6.3 %	5	6.1 %	3	8.6 %	18	6.0 %
Online	35	29.2 %	16	25.0 %	25	30.5 %	10	28.6 %	86	28.5 %
Total	120	100.0 %	64	100.0 %	82	100.0 %	35	100.0 %	302	100.0 %

Q6C. HOW DO YOU PLACE YOUR BETS MOST OF THE TIME?

Total:

Method	Count	Percent
At the races	6	10.7%
By telephone	9	16.1%
Online	41	73.2%
Total	56	100.0%

By Gambler Type:

	Non problem gambler		Low risk gambler		Moderate risk gambler		Problem gambler		Total	
Method	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
At the races	2	22.2 %	2	10.0 %	0	0.0 %	2	14.3 %	6	10.7 %
By telephone	0	0.0 %	2	10.0 %	0	0.0 %	7	50.0 %	9	16.1 %
Online	7	77.8 %	16	80.0 %	13	100.0 %	5	35.7 %	41	73.2 %
Total	9	100.0 %	20	100.0 %	13	100.0 %	14	100.0 %	56	100.0 %

Q7. HOW OFTEN DO YOU GAMBLE?

Total:

Frequency	Count	Percent
Weekly or more often	1299	36.6 %
Less often than weekly to monthly	1270	35.7 %
Less often than monthly	981	27.5 %
Total	3550	100.0%

By Gambler Type:

	Non problem gambler		Low risk gambler		Moderate risk gambler		Problem gambler		Total	
Frequency	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Weekly or more often	651	35.1 %	273	35.9 %	223	37.8 %	151	44.6 %	1299	36.6 %
Less often than weekly to monthly	592	31.9 %	278	36.6 %	248	42.1 %	152	44.9 %	1270	35.7 %
Less often than monthly	613	33.0 %	209	27.5 %	118	20.1 %	35	10.4 %	981	27.5 %
Total	1856	100.0%	760	100.0%	589	100.0%	338	99.9%	3550	99.8%

Q8. GAMBLER PROFILES

Total:

	Count	Percent
Non gambler	1875	34.6 %
Non problem gambler	1857	34.3 %
Low risk gambler	760	14.0 %
Moderate risk gambler	589	10.9 %
Problem gambler	338	6.2 %
Total	5419	100.0 %

		Count	Percent
Have you bet more than you could really afford to lose	Rarely	469	13.2%
	Sometimes	400	11.3%
	Often	88	2.5%
	Always	35	1.0%
	Never	2468	69.6%
	Don't know	16	0.5%
	Don't gamble	68	1.9%
	Total	3544	100.0%
Have you needed to gamble with larger amounts of money to get the same feeling of excitement	Rarely	314	8.9%
	Sometimes	258	7.3%
	Often	73	2.1%
	Always	23	0.6%
	Never	2780	78.4%
	Don't know	23	0.6%
	Don't gamble	73	2.1%
	Total	3544	100.0%
Have you gone back another day to try to win back the money you lost	Rarely	391	11.0%
	Sometimes	340	9.6%
	Often	86	2.4%
	Always	27	0.8%
	Never	2617	73.8%
	Don't know	16	0.5%
	Don't gamble	67	1.9%
	Total	3544	100.0%
Have you borrowed money or sold something to get money to gamble	Rarely	160	4.5%
	Sometimes	111	3.1%
	Often	28	0.8%
	Always	18	0.5%
	Never	3135	88.5%
	Don't know	21	0.6%
	Don't gamble	71	2.0%
	Total	3544	100.0%
Have you felt that you might have a problem with gambling	Rarely	306	8.6%
	Sometimes	285	8.0%
	Often	60	1.7%
	Always	42	1.2%
	Never	2746	77.5%

	Don't know	33	0.9%
	Don't gamble	72	2.0%
	Total	3544	100.0%
Has gambling caused you health problems, including stress or anxiety	Rarely	228	6.4%
	Sometimes	206	5.8%
	Often	51	1.4%
	Always	29	0.8%
	Never	2927	82.6%
	Don't know	35	1.0%
	Don't gamble	68	1.9%
	Total	3544	100.0%
Have people criticised your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true	Rarely	251	7.1%
	Sometimes	228	6.4%
	Often	42	1.2%
	Always	25	0.7%
	Never	2892	81.6%
	Don't know	38	1.1%
	Don't gamble	68	1.9%
	Total	3544	100.0%
Has your gambling caused financial problems for you or your household	Rarely	240	6.8%
	Sometimes	199	5.6%
	Often	53	1.5%
	Always	31	0.9%
	Never	2936	82.8%
	Don't know	16	0.5%
	Don't gamble	69	1.9%
	Total	3544	100.0%
Have you felt guilty about the way you gamble or what happens when you gamble	Rarely	480	13.5%
	Sometimes	535	15.1%
	Often	109	3.1%
	Always	67	1.9%
	Never	2259	63.7%
	Don't know	25	0.7%
	Don't gamble	69	1.9%
	Total	3544	100.0%

GENDER**Total:**

	Count	Percent
Female	2808	51.8 %
Male	2613	48.2 %
Total	5421	100.0 %

By Gambler Type:

		Count	Percent
Non problem gambler	Female	988	53.2%
	Male	869	46.8%
Low risk gambler	Female	357	47.0%
	Male	403	53.0%
Moderate risk gambler	Female	252	42.8%
	Male	337	57.2%
Problem gambler	Female	140	41.4%
	Male	198	58.6%
Non gambler	Female	1070	57.1%
	Male	805	42.9%
Total	Female	2808	51.8%
	Male	2613	48.2%

AGE**Total:**

	Count	Percent
18-34	1525	28.1%
35-54	2053	37.9%
55+	1836	33.9%
Prefer not to say	7	0.1%
Total	5421	100.0%

By Gambler Type:

	Age	Count	Percent
Non problem gambler	18-34	407	21.9%
	35-54	710	38.2%
	55+	741	39.9%
	Prefer not to say	0	0.0%
Low risk gambler	18-34	206	27.1%
	35-54	281	37.0%
	55+	273	35.9%
	Prefer not to say	0	0.0%
Moderate risk gambler	18-34	171	29.0%
	35-54	225	38.2%
	55+	192	32.6%
	Prefer not to say	1	0.2%
Problem gambler	18-34	127	37.6%

	35-54	137	40.5%
	55+	74	21.9%
	Prefer not to say	0	0.0%
Non gambler	18-34	614	32.7%
	35-54	700	37.3%
	55+	556	29.6%
	Prefer not to say	6	0.3%
Total	18-34	1525	28.1%
	35-54	2053	37.9%
	55+	1836	33.9%
	Prefer not to say	7	0.1%
	Total	5421	100.0%

MARITAL STATUS

Total:

	Count	Percent
Single, never married	1029	19.0 %
Married or defacto	3599	66.4 %
Separated or divorced	641	11.8 %
Widowed	131	2.4 %
Don't know / refuse	21	0.4 %
Total	5421	100.0 %

By Gambler Type:

	Non gambler		Non problem gambler		Low risk gambler	
Marital status	Count	Percent	Count	Percent	Count	Percent
Single, never married	407	21.7 %	280	15.1 %	136	17.9 %
Married or defacto	1204	64.2 %	1351	72.8 %	500	65.8 %
Separated or divorced	215	11.5 %	178	9.6 %	100	13.2 %
Widowed	38	2.0 %	46	2.5 %	20	2.6 %
Don't know / refuse	11	0.6 %	2	0.1 %	4	0.5 %
Total	1875	100.0 %	1857	100.0 %	760	100.0 %

	Moderate risk gambler		Problem gambler		Total	
Marital status	Count	Percent	Count	Percent	Count	Percent
Single, never married	124	21.1 %	80	23.7 %	1029	19.0 %
Married or defacto	354	60.1 %	190	56.2 %	3599	66.4 %
Separated or divorced	91	15.4 %	57	16.9 %	641	11.8 %
Widowed	18	3.1 %	9	2.7 %	131	2.4 %
Don't know / refuse	2	0.3 %	2	0.6 %	21	0.4 %
Total	589	100.0 %	338	100.0 %	5421	100.0 %

EDUCATION

Total:

	Count	Percent
Some high school	815	15.0 %
Completed high school	1148	21.2 %
Some technical school or college (TAFE)	610	11.3 %
Completed technical or college diploma (TAFE)	1125	20.8 %
Some university	472	8.7 %
Completed university degree (Undergrad, Masters or PhD)	1224	22.6 %
Don't know / refuse	27	0.5 %
Total	5421	100.0 %

By Gambler Type:

	Non gambler		Non problem gambler		Low risk gambler	
	Count	Percent	Count	Percent	Count	Percent
Some high school	273	14.7 %	122	16.1 %	116	19.7 %
Completed high school	413	22.2 %	142	18.7 %	130	22.1 %
Some technical school or college (TAFE)	205	11.0 %	94	12.4 %	73	12.4 %
Completed technical or college diploma (TAFE)	434	23.4 %	167	22.0 %	106	18.0 %
Some university	138	7.4 %	71	9.3 %	72	12.2 %
Completed university degree (Undergrad, Masters or PhD)	385	20.7 %	163	21.4 %	91	15.4 %
Don't know / refuse	9	0.5 %	1	0.1 %	1	0.2 %
Total	1857	100.0 %	760	100.0 %	589	100.0 %

	Moderate risk gambler		Problem gambler		Total	
	Count	Percent	Count	Percent	Count	Percent
Some high school	53	15.7 %	250	13.3 %	815	15.0 %
Completed high school	73	21.6 %	390	20.8 %	1148	21.2 %
Some technical school or college (TAFE)	48	14.2 %	190	10.1 %	610	11.3 %
Completed technical or college diploma (TAFE)	62	18.3 %	356	19.0 %	1125	20.8 %
Some university	37	10.9 %	154	8.2 %	472	8.7 %
Completed university degree (Undergrad, Masters or PhD)	64	18.9 %	521	27.8 %	1224	22.6 %
Don't know / refuse	1	0.3 %	14	0.7 %	27	0.5 %
Total	338	100.0 %	1875	100.0 %	5421	100.0 %

INCOME

Total:

	Count	Percent
Less than \$20,000	526	9.7 %
\$20,000 to just under \$35,000	819	15.1 %
\$35,000 to just under \$50,000	819	15.1 %
\$50,000 to just under \$65,000	611	11.3 %
\$65,000 to just under \$70,000	337	6.2 %
\$70,000 to just under \$95,000	726	13.4 %
\$95,000 to just under \$120,000	494	9.1 %
\$120,000 to just under \$140,000	190	3.5 %
\$140,000 to just under \$160,000	125	2.3 %
\$160,000 to just under \$180,000	39	0.7 %
\$180,000 or more	71	1.3 %
Don't know/Refuse	664	12.2 %
Total	5421	100.0 %

By Gambler Type:

Household Income	Non gambler		Non problem gambler		Low risk gambler	
	Count	Percent	Count	Percent	Count	Percent
Less than \$20,000	207	11.0 %	135	7.3 %	74	9.7 %
\$20,000 to just under \$35,000	267	14.2 %	271	14.6 %	117	15.4 %
\$35,000 to just under \$50,000	283	15.1 %	252	13.6 %	124	16.3 %
\$50,000 to just under \$65,000	190	10.1 %	226	12.2 %	78	10.3 %
\$65,000 to just under \$70,000	107	5.7 %	122	6.6 %	47	6.2 %
\$70,000 to just under \$95,000	236	12.6 %	264	14.2 %	102	13.4 %
\$95,000 to just under \$120,000	154	8.2 %	201	10.8 %	65	8.6 %
\$120,000 to just under \$140,000	63	3.4 %	68	3.7 %	33	4.3 %
\$140,000 to just under \$160,000	46	2.5 %	53	2.9 %	16	2.1 %
\$160,000 to just under \$180,000	17	0.9 %	11	0.6 %	6	0.8 %
\$180,000 or more	30	1.6 %	23	1.2 %	12	1.6 %
Don't know/Refuse	275	14.7 %	231	12.4 %	86	11.3 %
Total	1875	100.0 %	1857	100.0 %	760	100.0 %

				Moderate risk gambler		Problem gambler		Total	
Household Income				Count	Percent	Count	Percent	Count	Percent
Less than \$20,000				69	11.7 %	41	12.1 %	526	9.7 %
\$20,000	to	just	under	108	18.3 %	56	16.6 %	819	15.1 %
\$35,000									
\$35,000	to	just	under	102	17.3 %	58	17.2 %	819	15.1 %
\$50,000									
\$50,000	to	just	under	70	11.9 %	47	13.9 %	611	11.3 %
\$65,000									
\$65,000	to	just	under	30	5.1 %	31	9.2 %	337	6.2 %
\$70,000									
\$70,000	to	just	under	86	14.6 %	38	11.2 %	726	13.4 %
\$95,000									
\$95,000	to	just	under	48	8.1 %	26	7.7 %	494	9.1 %
\$120,000									
\$120,000	to	just	under	18	3.1 %	8	2.4 %	190	3.5 %
\$140,000									
\$140,000	to	just	under	10	1.7 %	0	0.0 %	125	2.3 %
\$160,000									
\$160,000	to	just	under	3	0.5 %	2	0.6 %	39	0.7 %
\$180,000									
\$180,000 or more				3	0.5 %	3	0.9 %	71	1.3 %
Don't know/Refuse				42	7.1 %	28	8.3 %	664	12.2 %
Total				589	100.0 %	338	100.0 %	5421	100.0 %

Appendix D – Message Summary Reports

Independent Gambling Authority of
South Australia

MESSAGE 1 SUMMARY

**“DON’T CHASE YOUR LOSSES. WALK AWAY.
GAMBLE RESPONSIBLY.”**

2009

December 1, 2008 – May 30, 2009



Insightrix Research

PO Box 992

Horsham

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www.insightrix.com

MESSAGE 1 SUMMARY – “DON’T CHASE YOUR LOSSES. WALK AWAY. GAMBLE RESPONSIBLY.”

POST-CAMPAIGN SUMMARY

A total of 301 online respondents completed the survey between May 28th and June 1st, 2009. This is the third of three waves of research measuring advertising recall of the message: “Don’t chase your losses. Walk away. Gamble responsibly.” The pre-campaign wave ran in late November 2008 while the mid-campaign measurement was conducted between February 26th and March 12th, 2009. The margin of error in this online poll is estimated to be ± 5.65 percentage points, 19 times out of 20.

Advertising Recall

- In the post-campaign, nearly seven-in-ten (68.8%) say they have seen advertising relating to gambling in general within the past 6 months. This represents an increase from six-in-ten (60.0%) in the pre-campaign and is consistent with the mid-campaign measurement (69.1%).
 - Four-in-ten (42.4%) mention advertising relating to gambling sites, games, events or facilities, a lower proportion compared to the mid-campaign wave (53.2%) but higher than the pre-campaign wave (33.5%). The statement “Gamble responsibly” was mentioned by 13.9% of respondents, on par with the mid-campaign findings (10.5%) and only a slightly lower percentage compared to 18.7% in wave 1 of the research. Recall of specific messages remains low: “Think of the people who need your support”: 2.6%, “Don’t chase your losses”: 1.6%, “Leave before you lose it”: 1.0%, “Stay in control”: 0.5%, “Don’t let the game play you”: 0.0%.
 - The phrase “Gamble Responsibly” is recalled by three quarters (76.2%), which is consistent with both the pre-campaign wave (74.5%) and the mid-campaign wave (77.7%). Most commonly, respondents in the post-campaign wave recall this campaign on television (63.8%), on the radio (42.6%), on TV screens at gambling venues (27.8%), in newspapers (26.4%), and on posters (25.8%).
 - When prompted with the phrase “Don’t chase your losses. Walk away. Gamble responsibly”, one quarter (24.9%) of post-campaign respondents remember hearing the phrase. This represents an increase over the pre-campaign recall findings (15.8%) however it is in line with mid-campaign findings (22.7%). Television remains the most common venue for message recollection, with 44.8% saying they remember seeing the phrase in this way. On televisions at gambling venues (32.9%), on the radio (29.4%), and on posters (29.0%) are also commonly mentioned by post-campaign respondents.

Gambling Habits

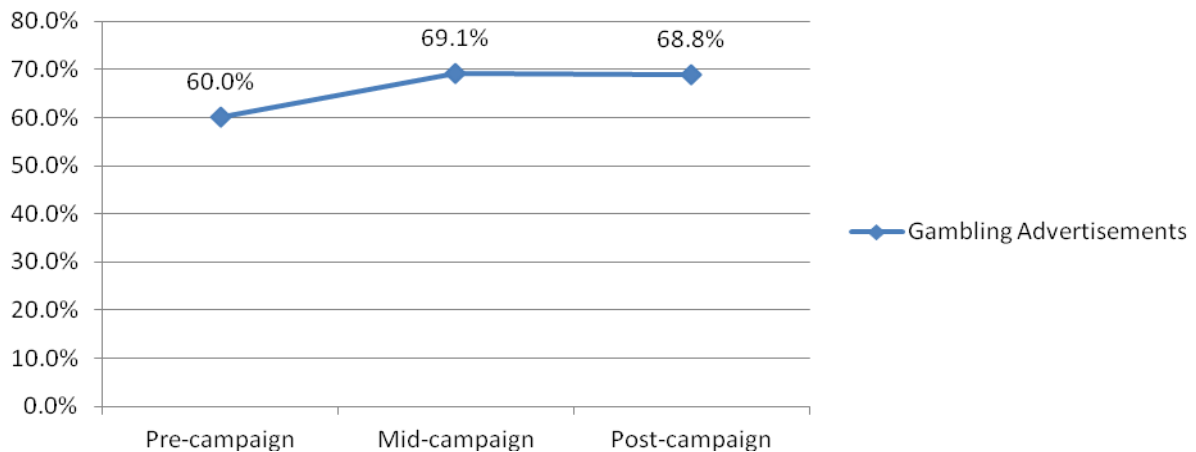
- The most common type of gambling that respondents participate in remains SA Lotteries products such as keno or scratchies, with four in ten respondents (43.0%) saying they gamble most often in this way. One in six (16.3%) report playing on gaming machines, 6.7% report betting with SA TAB, 3.9% play casino games most often, and only two respondents (0.8%) report betting with a bookmaker. A notable proportion (29.3%) state they rarely or never gamble.
- Three quarters (77.0%) of those who play on gaming machines do so most often at hotels. Two in ten (18.3%) play at clubs and 4.0% at a casino.
- Twenty respondents state they bet with SA TAB. Of those, twelve (57.6%) place bets at a SA TAB branch or agency, seven (35.7%) place bets online, while only one respondent (6.7%) reports using the telephone.
- Of the two respondents who use a bookmarker, one places bets by telephone and one places bets online.
- Slightly more than one third (39.3%) gamble weekly or more often, which is slightly less than respondents reported mid-campaign (43.3%). One third (33.6%) gamble less often than weekly to monthly while the remaining 27.1% gamble less often than monthly.
- Using a scoring system based on statements about gambling, 6.9% are considered problem gamblers, 10.3% are moderate risk gamblers, 15.9% are low risk gamblers, 37.5% are non-problem gamblers and the remaining 29.3% are non-gamblers.
- In general, those with a higher risk level have a higher recall of the advertisements. The following table shows the prompted recall rate of the different gambler types.

	Non-Gambler	Non-problem gambler	Low risk gambler	Moderate risk gambler	Problem gambler
Any advertising	64.8%	66.4%	64.6%	77.4%	95.0%
"Gamble Responsibly"	74.2%	74.1%	77.1%	77.4%	95.2%
"Don't chase your losses. Walk Away. Gamble Responsibly."	13.6%	23.9%	25.0%	36.7%	57.1%

OVERALL COMPARISONS

Gambling Advertisements

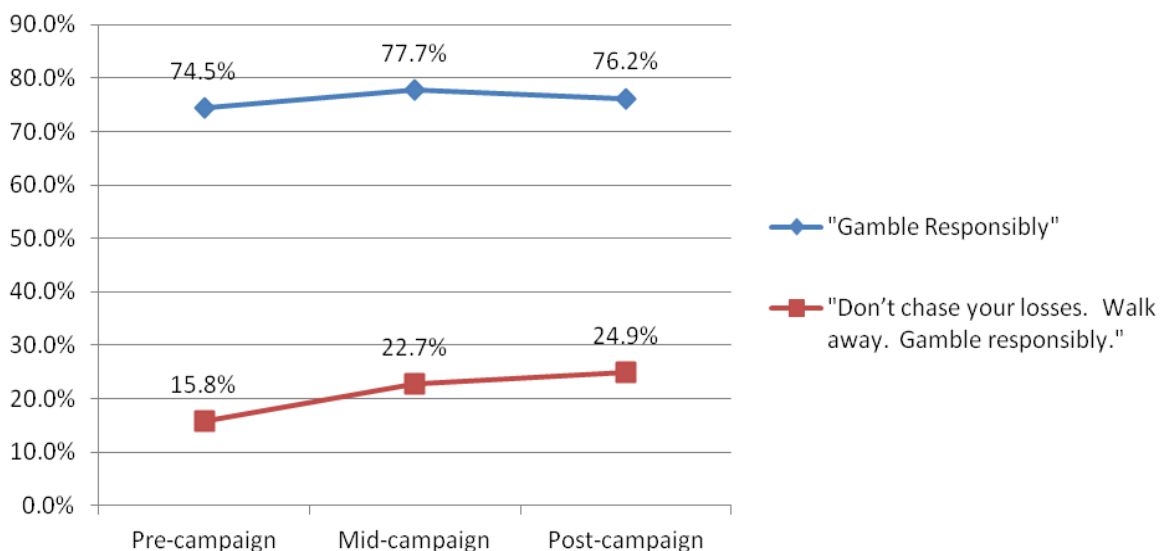
In general, a higher percentage of respondents claim to have seen any gambling advertisements in the mid and post-campaign wave compared to the pre-campaign wave.



Message Recall

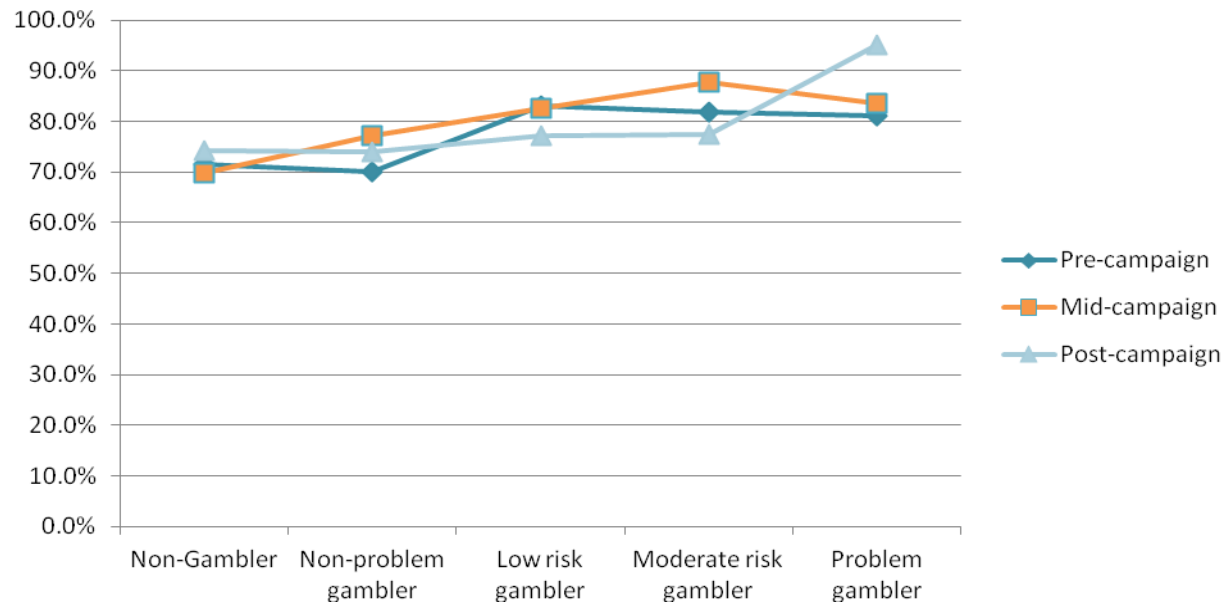
Recall of the “Gamble responsibly” message is approximately consistent throughout all three waves of research. This suggests that the message is prevalent already in the general population.

Recall of the specific message saw a notable increase throughout the research from 15.8% to 24.9%.

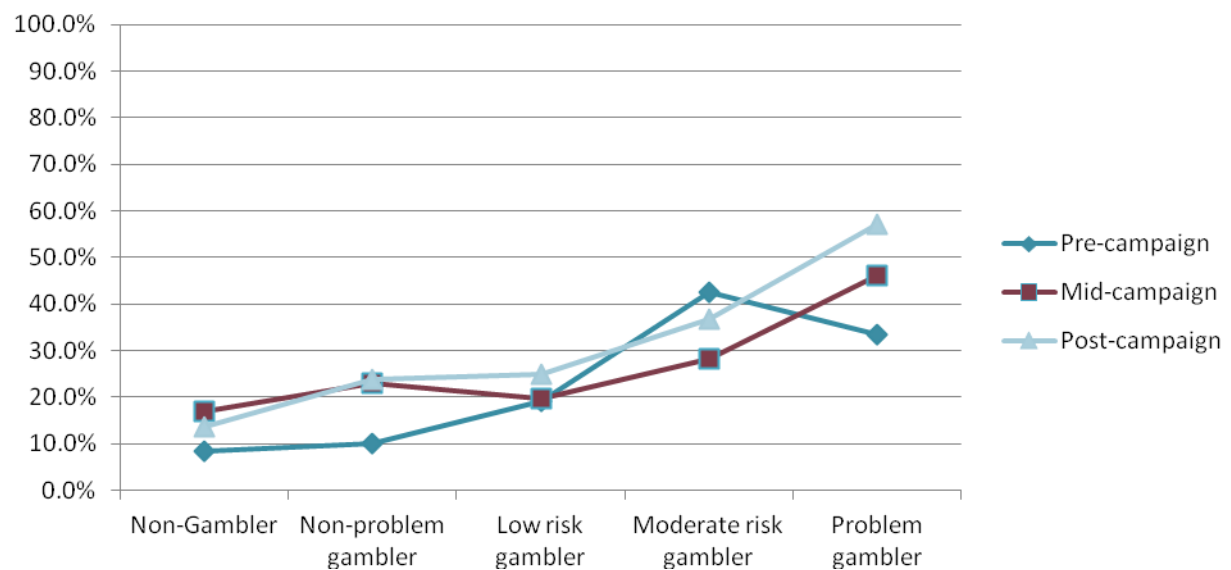


Message Recall by Gambler Type

In general those who are more at risk for gambling problems have a higher recall of the “Gamble Responsibly” slogan.



As well, higher recall of the specific message is seen among those who are more at risk.



Key Points Summary

- The slogan “Gamble Responsibly” is commonly recognized among respondents; about three quarters recall this slogan when prompted.
- Results suggest that those who are being targeted by the advertisements are indeed recalling them – problem gamblers are notably more likely to recall both the general message (“Gamble Responsibly”) and specific message (“Don’t chase your losses. Walk away. Gamble Responsibly.”).
- Notable lift for the specific message was seen between the pre-campaign wave and the mid- and post-campaign waves.

**Independent Gambling Authority of
South Australia**

MESSAGE 2 SUMMARY

**“DON’T LET THE GAME PLAY YOU. STAY IN
CONTROL. GAMBLE RESPONSIBLY.”**

2010

June 1, 2009 – November 30, 2009

Insightrix Research

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Appendix

MESSAGE 2 SUMMARY

“DON’T LET THE GAME PLAY YOU. STAY IN CONTROL. GAMBLE RESPONSIBLY.”

POST-CAMPAIGN SUMMARY

A total of 300 online respondents completed the survey between November 27th and December 1st, 2009. This is the final of three waves of research measuring advertising recall of the message: “Don’t let the game play you. Stay in control. Gamble responsibility”

Advertising Recall

- About three quarters (76.7%) of respondents have seen read or heard any advertising related to gambling within the past 6 months. This is in line with the mid-wave (73.8%) but an increase from the pre-campaign wave (66.3%).
 - Of respondents who saw advertising, 46.7% said that it was related to gambling sites, games or events. A total of 16.2% mentioned advertising for help for gambling addiction, Gamblers Anonymous or other anti-gambling promotions. The “Gamble Responsibly” message was mentioned by 18.1% of respondents.
 - Recall of specific messages remains low: “Think of the people who need your support”: 3.0%, “Don’t chase your losses”: 0.0%, “Leave before you lose it”: 1.2%, “Stay in control”: 1.2%, “Don’t let the game play you”: 0.0%.
 - The phrase “Gamble Responsibly” is recalled by more than eight in ten (83.1%), notably higher than the pre-wave result (74.3%) but in line with the mid-wave (82.1%) recall rate. The most commonly mentioned advertising media was television (65.9%), on the radio (37.0%), in newspapers (28.3%), on posters (26.8%) and on TV screens at gambling venues (21.2%).
 - When prompted with the phrase “Don’t let the game play you. Stay in control. Gamble responsibly”, 18.9% of respondents claim to recall hearing this message. Despite that this was the post-campaign wave, there was no noticeable lift from the pre-campaign and mid-campaign waves (both 18.6%). Most commonly, respondents claim that they saw a television advertisement with this message (48.3%). Newspapers (25.0%), on the radio (29.8%), in newsletters at gambling venues (21.2%) and on TV screens at gambling venues (21.5%) and posters at gambling venues (21.8%) are also commonly mentioned by respondents.

Gambling Habits

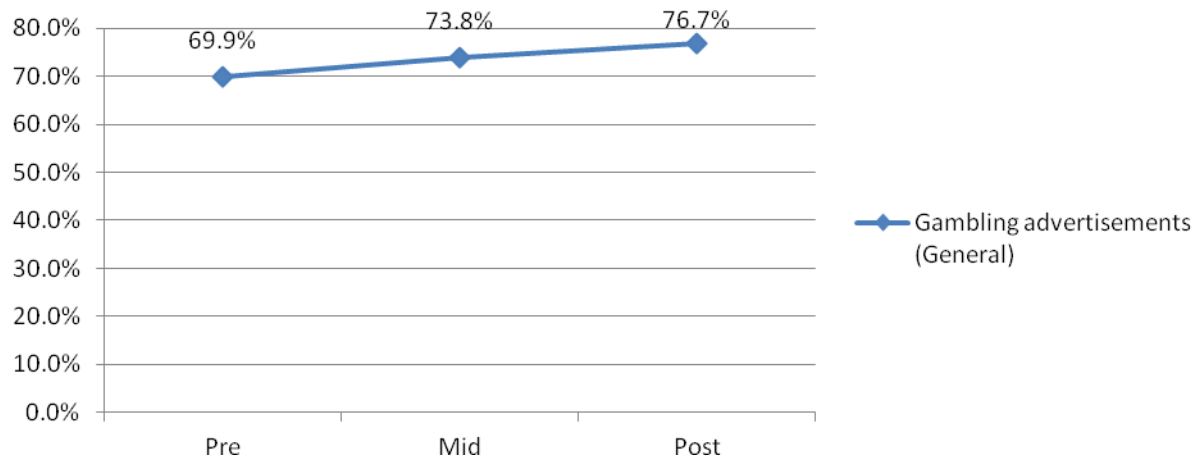
- As with the pre-campaign and mid-campaign waves of data collection, respondents most common method of gambling are with SA Lotteries products such as keno or scratchies (43.2%). A total of 17.6% report playing on gaming machines, 7.2% report betting with SA TAB, 3.1% play casino games most often, and 0.2% bet with a bookmaker. Three in ten (29.1%) indicate that they rarely or never gamble.
- Nearly all (92.4%) respondents who play on gaming machines do so at a hotel. A further 2.4% play at clubs and 5.2% at a casino.
- Of those who bet with SA TAB, most place bets at a SA TAB branch or agency (69.3%). Five respondents (23.8%) do so online, 4.4% by telephone and 2.5% at the races.
- The one respondent who bets with a bookmaker does so at the races.
- One third (32.1%) of those who gamble do so weekly or more often. A further 38.8% gamble less often than weekly to monthly while the remaining 29.1% gamble less often than monthly.
- Using a scoring system based on statements about gambling, 6.8% are considered problem gamblers, 11.3% are moderate risk gamblers, 18.6% are low risk gamblers, 33.8% are non-problem gamblers and the remaining 29.4% are non-gamblers.
- In general, those with a higher risk level have a higher recall of the advertisements. The following table shows the prompted recall rate of the different gambler types. Note that the two highest-risk groups have very small sample sizes.

	Non-gambler	Non-problem gambler	Low risk gambler	Moderate risk gambler	Problem gambler
Any advertising	70.0%	78.2%	81.2%	87.6%	67.7%
"Gamble Responsibly"	76.8%	89.9%	81.1%	75.5%	96.6%
"Don't let the game play you. Stay in control."	17.8%	10.5%	24.7%	24.0%	40.3%

Message 2 - Overall Campaign Summary

Gambling Advertisements

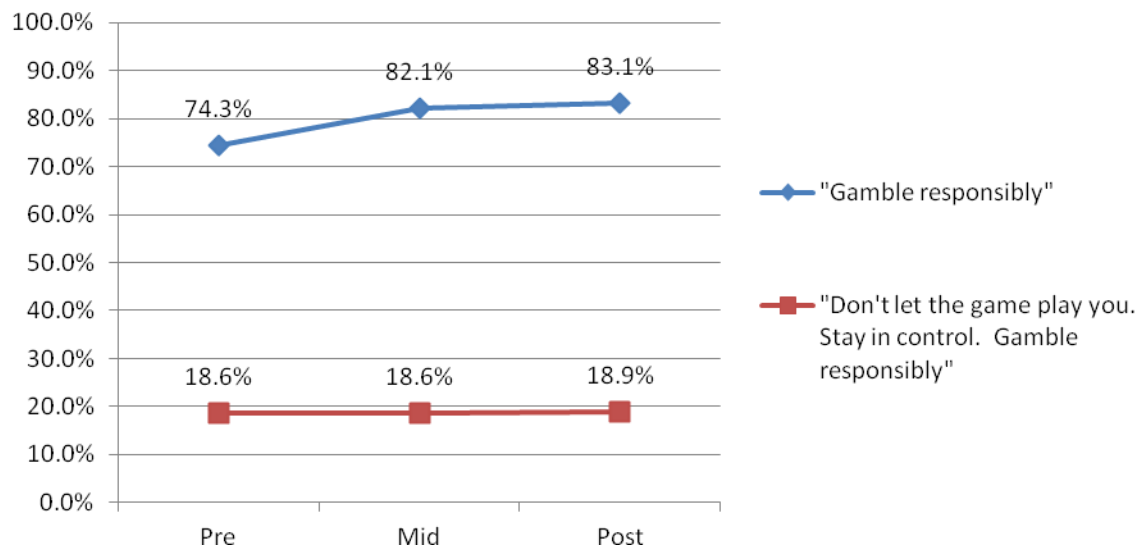
Overall recall of gambling advertisements has increased over the three waves of data collection from 69.9% in the pre-campaign wave to 76.7% in the post-campaign wave.



Message Recall

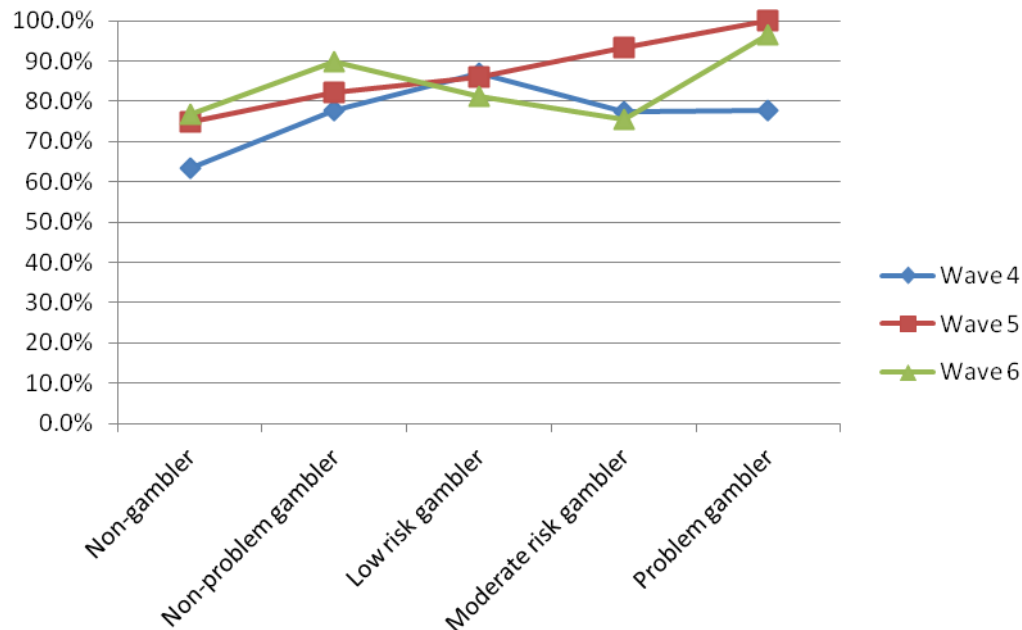
Recall of the "Gamble responsibly" message has increased to a high of 83.1% in the post-campaign wave from 74.3% in the pre-campaign wave.

Recall of the specific message did not achieve lift throughout the campaign.

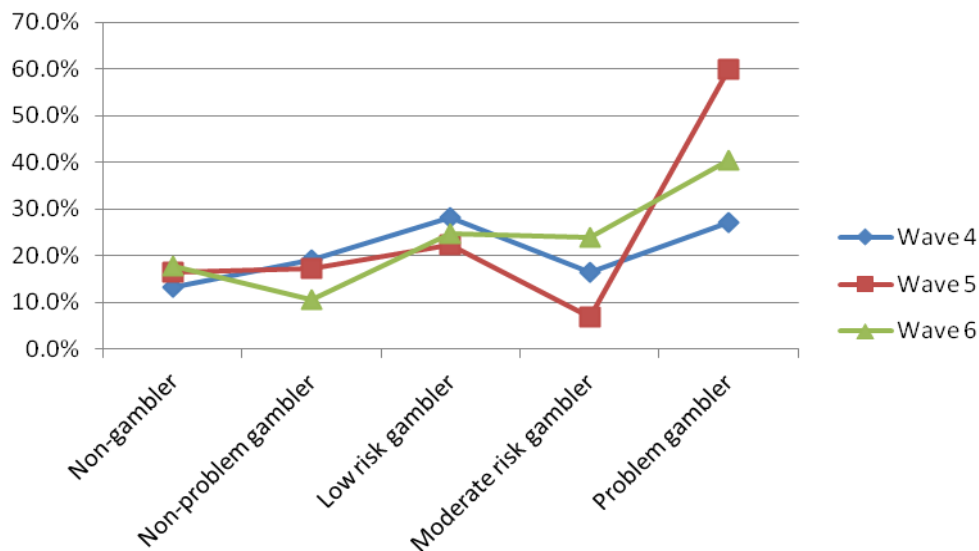


Message Recall by Gambler Type

In general those who are more at risk for gambling problems have a higher recall of the “Gamble Responsibly” slogan. Note that the last two groups have a very small sample size.

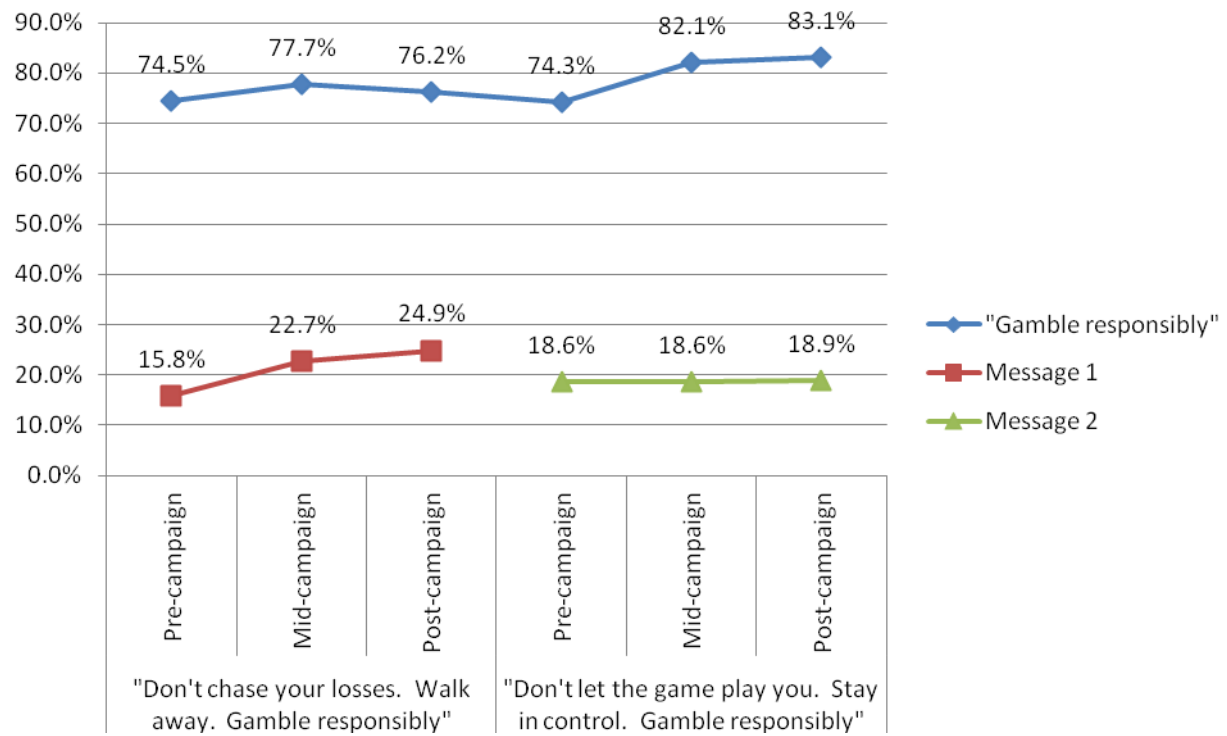


As well, higher recall of the specific message is seen among those who are more at risk. Again, it is important to note that the last two groups have a very small sample size.



CAMPAIGN TO CAMPAIGN COMPARISON

Overall, the first campaign message achieved a better lift when compared to the second message. Prompted recall of the “Gamble responsibly” message, however, has continued to increase from the beginning of the first advertising campaign to a six-wave high of 83.1%.



Key Points Summary

- The slogan “Gamble Responsibly” is commonly recognized among respondents and recall of this message has continued to increase throughout all waves of data collection.
- Results suggest that those who are being targeted by the advertisements are indeed recalling them – problem gamblers are notably more likely to recall both the general message (“Gamble Responsibly”) and specific message (“Don't let the game play you. Stay in control.”), however, the difference was not as strong as with the previous campaign. This was also the case with the previous campaign.
- No significant lift was seen for this specific campaign and post-campaign recall rate is about two in ten (18.9%).

**Independent Gambling Authority of
South Australia**

MESSAGE 3 SUMMARY

***"STAY IN CONTROL. LEAVE BEFORE YOU
LOSE IT. GAMBLE RESPONSIBLY."***

2010

December 1, 2009 – May 31, 2010

**Ad Recall Survey June
2010**

Insightrix Research

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Appendix

Independent Gambling Authority of South Australia

POST-CAMPAIGN SUMMARY

A total of 300 online respondents completed the survey between May 30th and June 3rd, 2010. This is the third of three waves of research measuring advertising recall of the message: “Stay in control. Leave before you lose it. Gamble responsibly.”

Advertising recall

- Approximately seven in ten (71.0%) of respondents have seen, read, or heard any advertising related to gambling within the past six months. There is no significant difference between this result and the pre-wave (67.5%) and mid-wave (63.6%) results.
 - Among respondents who saw advertising, 42.7% said that it was related to gambling sites, games or events. A total of 24.4% mentioned advertising related to help for gambling addiction, Gamblers Anonymous, or other anti-gambling promotions. The “Gamble responsibly.” message was mentioned by 22.5% of respondents.
 - Recall of specific messages remains low: “Think of the people who need your support”: 2.8%, “Leave before you lose it”: 1.4%, “Stay in control”: 0.9% and “Don’t go over the top”: 0.5%. “Don’t chase your losses, walk away”, “Don’t let the game play you”, “You know the score” and “Know when to stop” were not recalled by any respondents.
 - The phrase “Gamble responsibly.” has prompted recall of almost eight in ten (79.0%) respondents, a similar proportion to both pre-wave (79.4%) and mid-wave (77.2%) results. The most commonly mentioned advertising sources were television (62.4%), radio (35.0%), newspapers (27.8%), posters (22.4%) and TV screens at gambling venues (19.0%).
 - When prompted with the phrase “Stay in control. Leave before you lose it.”, 18.3% of respondents claimed to recall hearing this message. Despite being the post-campaign wave, there was no notable increase from the pre- and mid-campaign waves (18.6% and 18.4% respectively). Most commonly, respondents claimed to have seen a television advertisement with this message (45.5%). On posters (29.1%), in newspapers (23.6%), on the radio (23.6%) and in newsletters (23.6%) and on TV screens (21.8%) at gambling venues are also commonly mentioned by respondents. Compared to the pre-wave results, respondents recalled seeing the message more often on the radio and less often on television and on TV screens at gambling venues.

Gambling habits

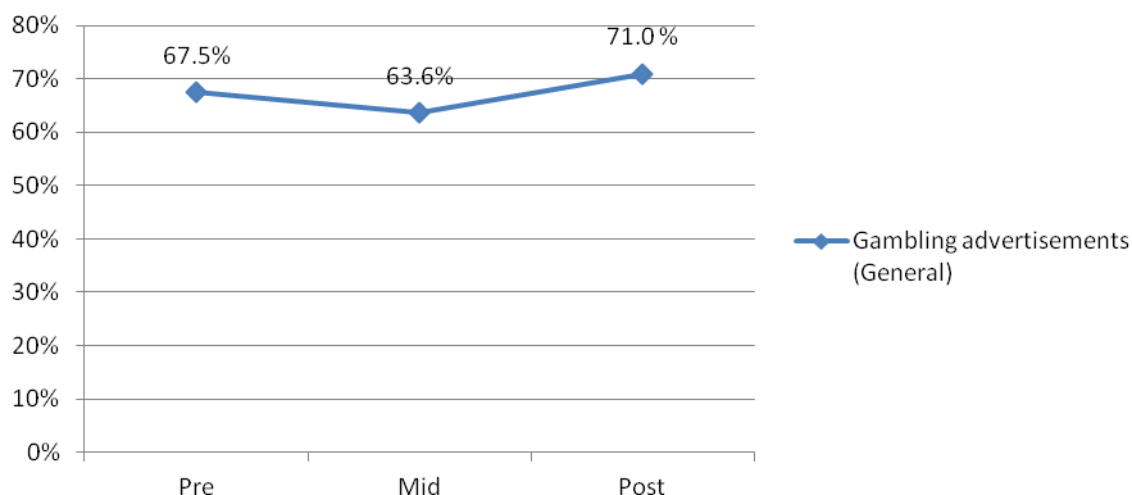
- Similar to the pre- and mid-campaign waves, respondents most commonly gamble through SA Lotteries products such as keno or scratchies (41.0%). A total of 15.3% reported playing on gaming machines most often, 5.0% play casino games, 3.3% bet with SA TAB, and 0.7% bet with a bookmaker. More than two thirds (34.7%) indicate they rarely or never gamble.
- A large majority (80.4%) of respondents who play on gaming machines do so at hotels. A further 13.0% play at casinos and 6.5% play at clubs.
- Of those who bet with SA TAB, most place bets at a SA TAB branch or agency (four respondents or 40.0%). Five respondents (50.0%) do so online and one by telephone. No respondents reported placing bets at the races.
- The two respondents who bet with bookmakers do so online.
- More than one third (34.2%) of those who gamble do so weekly or more often. A further 42.9% gamble less often than weekly to monthly (compared to 29.2% pre-wave) while the remaining 23.0% gamble less often than monthly (compared to 34.1% pre-wave).
- Using a scoring system based on statements about gambling, 9.0% are considered problem gamblers, 9.7% are moderate risk gamblers, 14.0% are low risk gamblers, 32.7% are non-problem gamblers and the remaining 34.7% are non-gamblers.
- In general, those with a higher risk level for gambling also have a higher recall of the advertisements. The following table shows the prompted recall rate of the different gambler types. Note that the two highest-risk groups have very small sample sizes and thus, their results should be interpreted with caution.

	Non-gambler	Non-problem gambler	Low risk gambler	Moderate risk gambler	Problem gambler
Any advertising	66.3%	67.3%	78.6%	75.9%	85.2%
"Gamble responsibly."	67.3%	88.8%	83.3%	75.9%	85.2%
"Stay in control. Leave before you lose it."	10.6%	15.3%	21.4%	24.1%	48.1%

OVERALL CAMPAIGN SUMMARY

Gambling advertisements

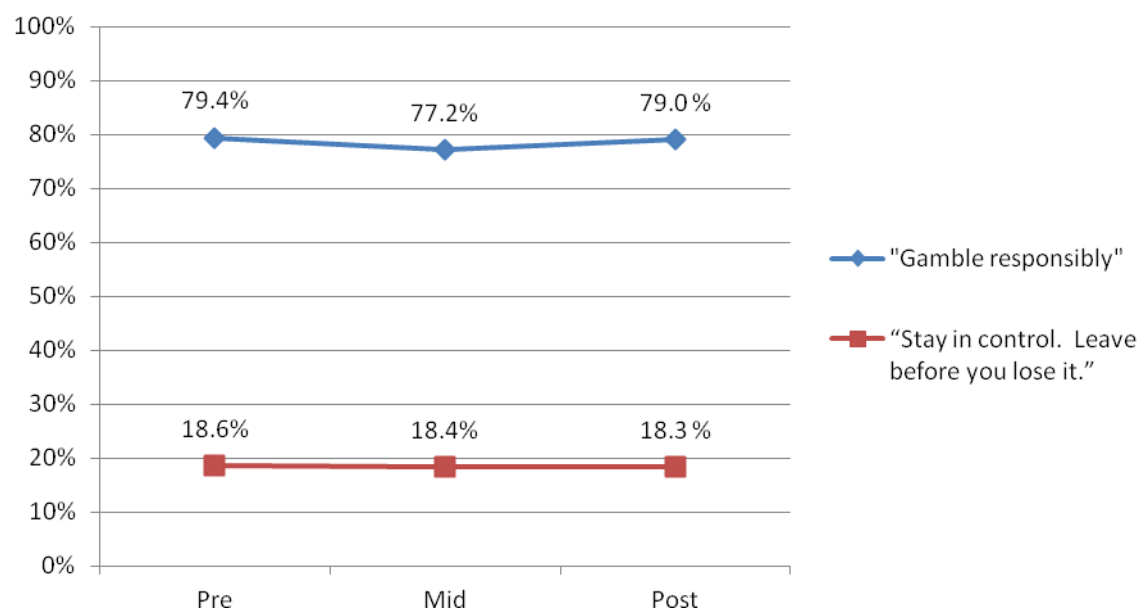
Overall, recall of gambling advertisements has increased slightly over the three waves of data collection from 67.5% in the pre-campaign wave to 71.0% in the post-campaign wave.



Message recall

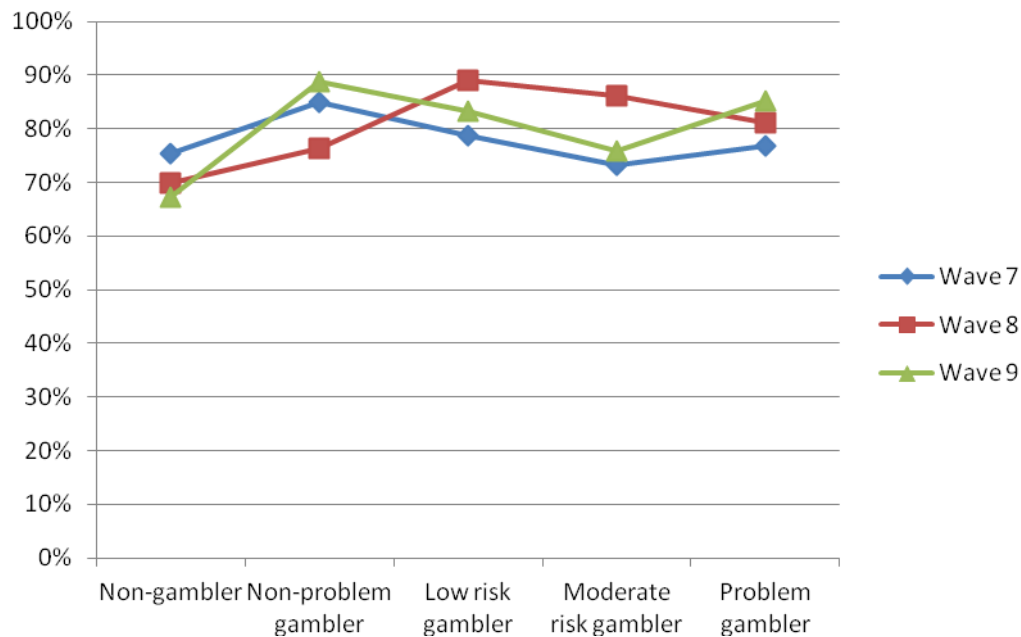
Recall of the “Gamble responsibly.” message has remained relatively unchanged from pre-campaign wave (79.4%) to post-campaign wave (79.0%).

Recall of the “Stay in control. Leave before you lose it.” message also did not achieve lift throughout the campaign.

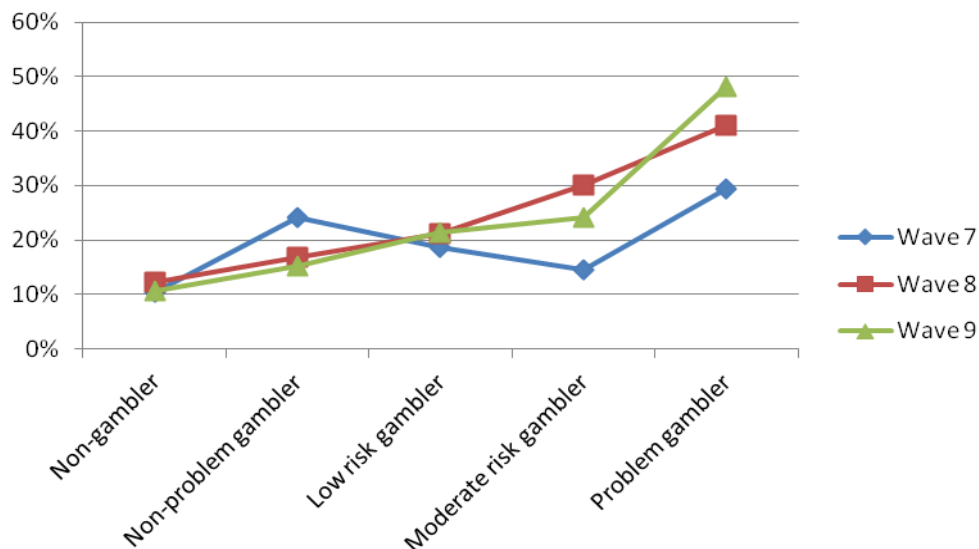


Message recall by gambler type

In general those who are more at risk for gambling problems have a higher recall of the “Gamble Responsibly” slogan. Note that the last two groups have very small sample sizes.

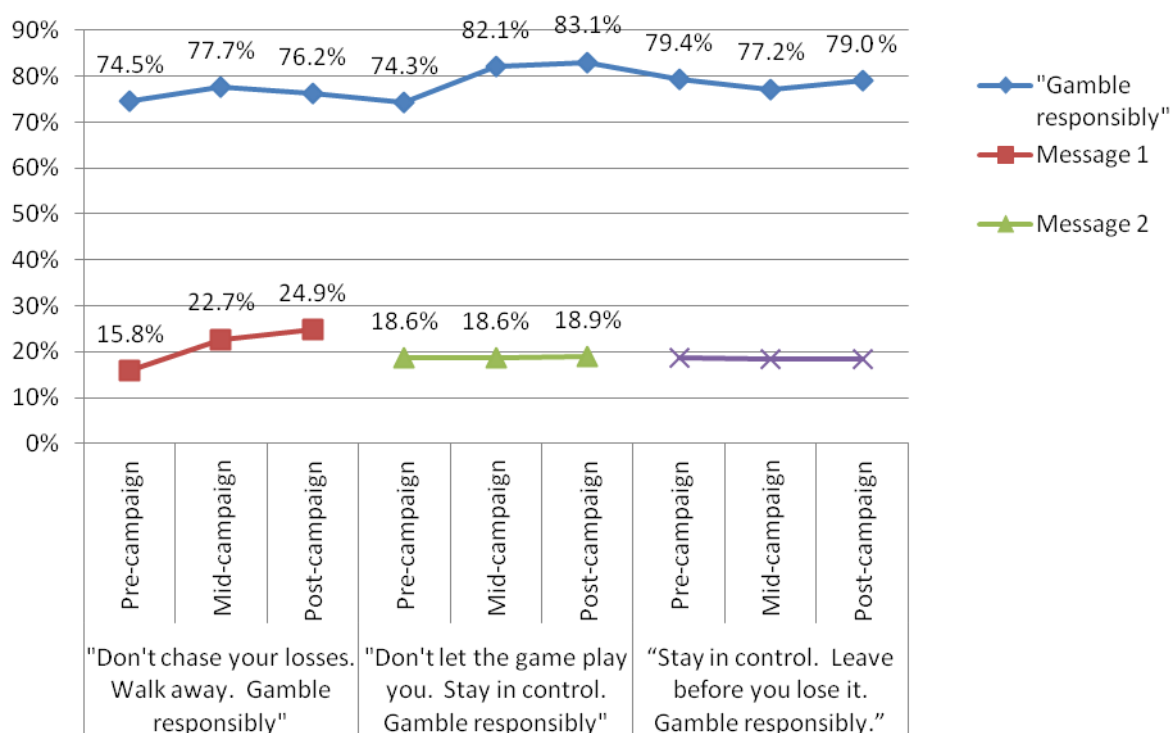


As well, higher recall of the specific message is seen among those who are more at risk. Again, it is important to note that the last two groups have very small sample sizes.



CAMPAIGN TO CAMPAIGN COMPARISON

Overall, the first campaign message achieved a better lift when compared to the second and third messages. Prompted recall of the “Gamble responsibly.” message has increased overall from the beginning of the first advertising campaign to the third; however, it did not again reach the high it did during the 6th campaign wave (83.1%).



KEY POINTS SUMMARY

- The slogan “Gamble responsibly.” is commonly recognized among respondents and recall of this message has increased overall throughout all waves of data collection.
- Results suggest that those who are being targeted by the advertisements are indeed recalling them – problem gamblers are notably more likely to recall both the general message (“Gamble responsibly.”) and specific message (“Stay in Control. Leave before you lose it.”) than are non-gamblers. The difference in recall between problem gamblers and non-gamblers was stronger this campaign than in previous campaigns.
- No significant lift was seen for this specific campaign and post-campaign recall rate for the specific message overall is approximately one in five (18.3%).

**Independent Gambling Authority of
South Australia**

MESSAGE 4 SUMMARY

**“YOU KNOW THE SCORE. STAY IN CONTROL.
GAMBLE RESPONSIBLY.”**

2010

June 1, 2010 – November 30, 2010

Insightrix Research

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Appendix

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Independent Gambling Authority of South Australia

POST-CAMPAIGN SUMMARY

A total of 300 online respondents completed the survey between November 27th and November 29th, 2010. This is the third of three waves of research measuring advertising recall of the message: “You know the score. Stay in control. Gamble responsibly.”

Advertising Recall

- Overall, six in ten (58.7%) of respondents recall seeing, reading, or hearing any advertising related to gambling within the past six months.
- Among respondents who saw the advertising, about one half (49.4%) said that it was related to gambling sites, games, or events. Just less than one in five (17.0%) mentioned advertising related to help for gambling addiction, Gamblers Anonymous, or other anti-gambling promotions. The “Gamble Responsibly” message was mentioned by one fifth (22.2%) of respondents.
- Recall of specific messages remains low. Particular message recall includes:
 - “Think of the people who need your support” – 5.7%,
 - “Leave before you lose it” – 1.1%,
 - “Know when to stop, don’t go over the top” – 0.6%
 - “Don’t chase your losses, walk away, stay in control”- 2.3%
- About three quarters (76.7%) of respondents recalled hearing the phrase “Gamble Responsibly”. Most commonly, respondents mentioned that they heard this message on television (63.0%), on the radio (32.2%), on posters (23.0%), in newspapers (23.0%), on the internet or internet gambling sites (14.3%), and on TV screens in gambling venues (20.0%).
- When prompted with the phrase “You know the score. Stay in control. Gamble responsibly.”, 15.3% of respondents claimed to recall hearing this message. This is up slightly from results in the pre-campaign wave where 12.0% of respondents recall this particular message, but slightly lower than the mid-campaign wave (17.3%). Respondents most commonly claimed that they saw the message on a television advertisement (56.5%). On the radio (21.7%), on TV screens at gambling venues (21.7%), in newspapers (37.0%), and on posters (17.4%) are also commonly mentioned by respondents.



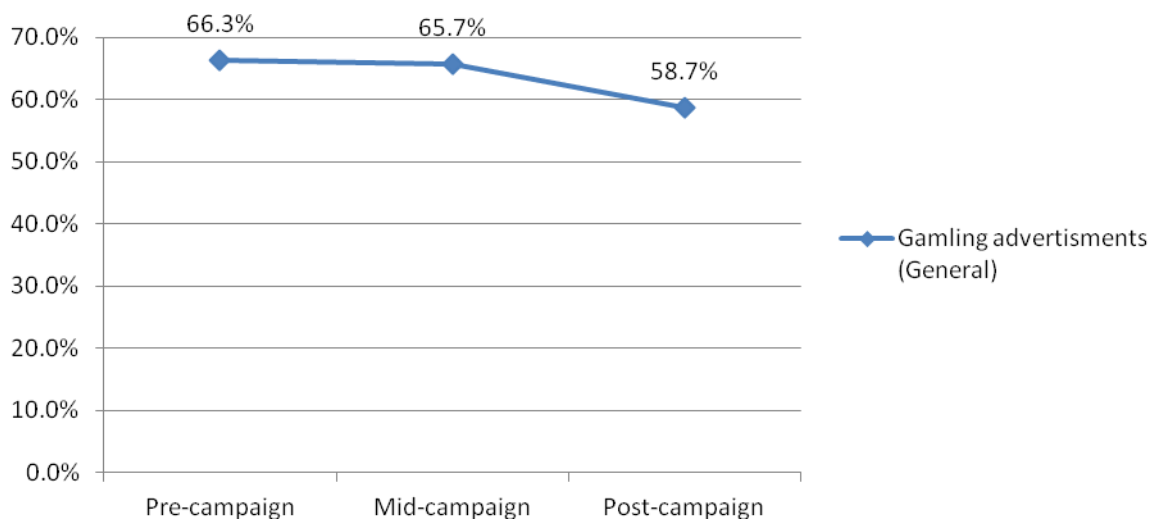
Gambling Habits

- Four in ten (42.0%) most commonly gamble with SA Lotteries products such as keno or scratchies. Gaming machines (10.3%) are next most common, followed by betting with an SA TAB (7.7%) and playing casino games (4.0%). One third (34.3%) indicate that they rarely or never gamble.
 - Most (61.3%) respondents who play on gaming machines do so at a hotel. A further 22.6% play at a casino while 16.1% play at clubs.
 - Of those who bet with SA TAB, nearly one half (43.5%) place bets at an SA TAB branch or agency. Four in ten (43.5%) place bets online, two respondents (8.7%) places bets at the races, and one places bets by telephone.
 - Five respondents bet with a bookmaker, and, of those, four place bets online and one does so by telephone.
- Four in ten (43.2%) of those who gamble do so weekly or more often. Three in ten (30.9%) gamble less often than weekly to monthly while the remaining one quarter (25.9%) gambles less often than monthly.
- Using a scoring system based on statements about gambling, 5.7% are considered problem gamblers, 11.7% are moderate risk gamblers, 13.7% are low risk gamblers, 34.7% are non-problem gamblers, and the remaining 34.4% are non-gamblers.
- The following graph shows the proportion recalling any advertising relating to gambling, recall of the “Gamble Responsibly” message, and claimed recall of the campaign message. In general, those with a higher risk level have a higher recall of the specific advertising.

OVERALL CAMPAIGN SUMMARY

Gambling advertisements

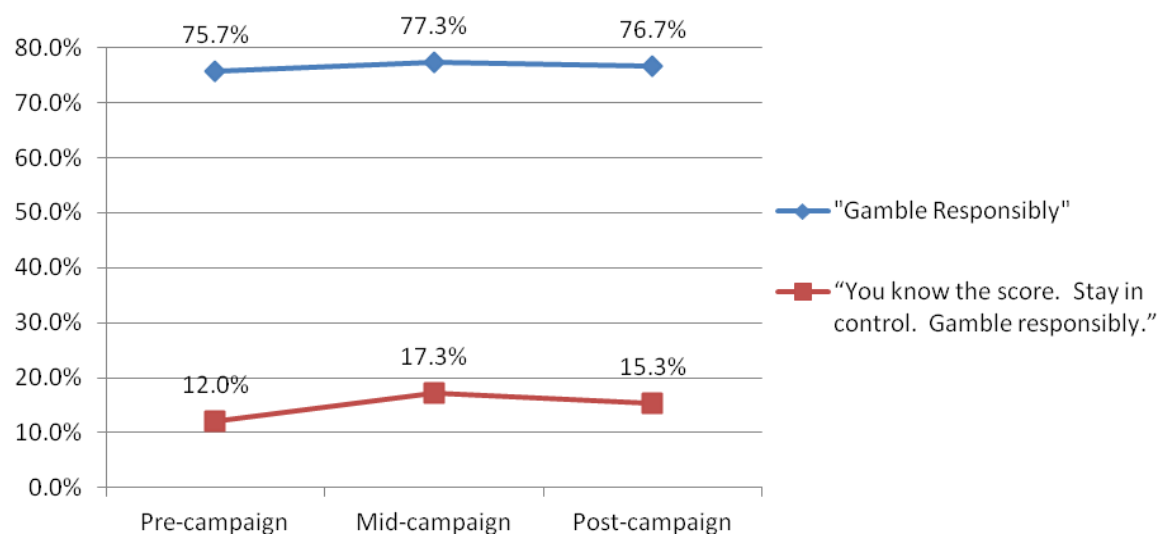
The overall recall rate of general gambling advertisements ranges from just less than six in ten to two thirds within the three waves of data collection.



Message recall

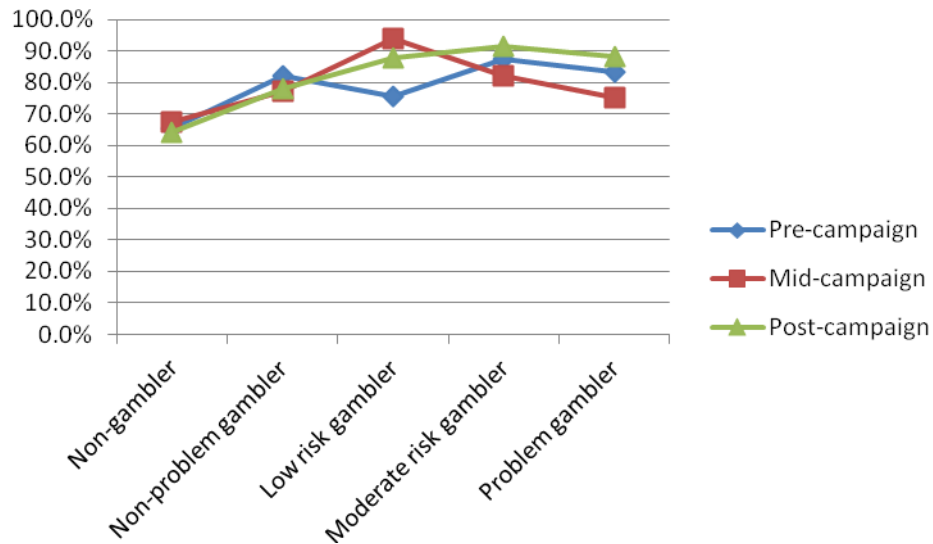
The “Gamble Responsibly” message was recalled by three quarters in each wave after prompting.

Recall of the current campaign phrase, “You know the score. Stay in control. Gamble Responsibly.” achieved a slight lift from 12.0% pre-campaign to 17.3% mid-campaign and 15.3% post-campaign.

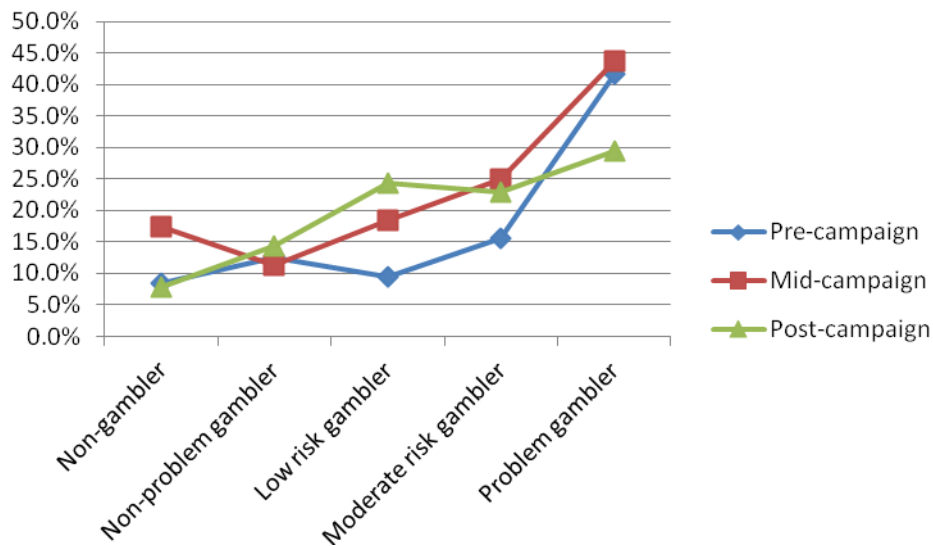


Message recall by gambler type

Respondents who are more at risk for gambling problems tend to have a slightly higher recall rate of “Gamble Responsibly”.

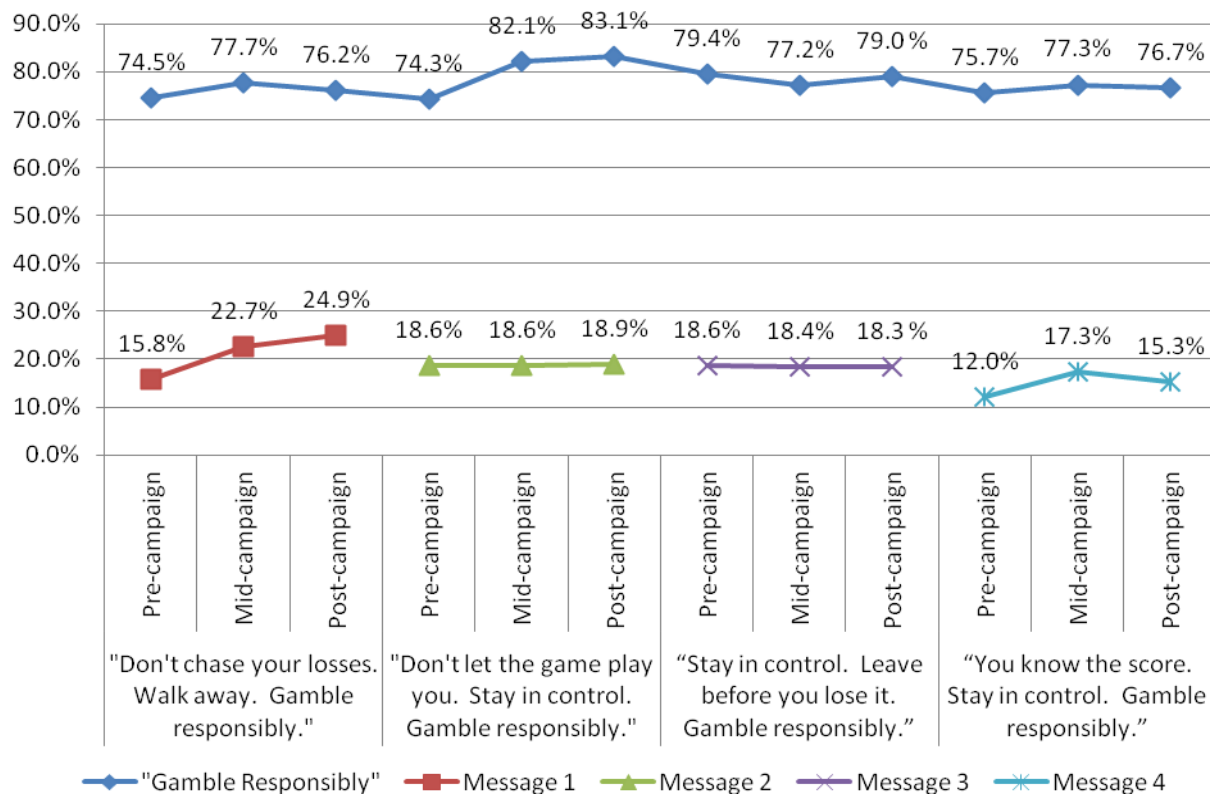


The specific message also has a higher recall rate among those who are of higher risk for gambling problems.



CAMPAIGN TO CAMPAIGN COMPARISON

This campaign achieved a slight lift; however, the overall recall rate was the lowest among all four campaign phrases so far.



Key Points Summary

- Recall of "Gamble Responsibly" remains high among respondents.
- As with the previous campaigns, those who are of a higher risk for gambling problems also tend to have a higher recall of the campaign phrases compared to those who are at a lower risk.
- Although this campaign achieved better lift than some of the other messages, the overall recall rate is the lowest among the four messages measured thus far.

Independent Gambling Authority of
South Australia

MESSAGE 5 SUMMARY

***“KNOW WHEN TO STOP. DON’T GO OVER THE
TOP. GAMBLE RESPONSIBLY.”***

2011

December 1, 2010 – May 31, 2011



Insightrix Research

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Independent Gambling Authority of South Australia

POST-CAMPAIGN SUMMARY

A total of 300 online respondents completed the survey from May 31st to June 5th 2011. This is the third of three waves of research on the 5th of 6 messages measuring advertising recall. The fifth message: “Know when to stop. Don’t go over the top. Gamble responsibly.”

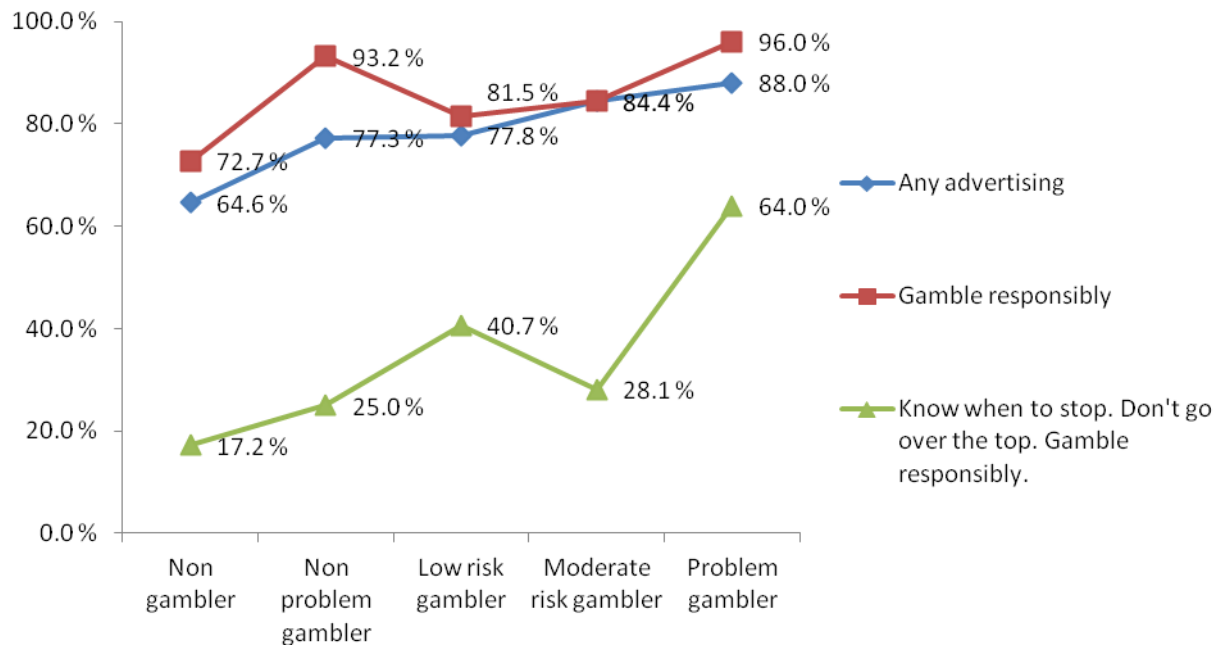
Advertising Recall

- Overall, seven in ten (74.7%) of respondents recall seeing, reading, or hearing any advertising related to gambling within the past six months.
- Among respondents who saw the advertising, about four in ten (40.5%) said that it was related to gambling sites, games, or events. Just over two in five (23.9%) mentioned advertising related to help for gambling addiction, Gamblers Anonymous, or other anti-gambling promotions. The “Gamble responsibly” message was mentioned by 14.6% of respondents.
- Recall of specific messages remains low. Particular message recall includes:
 - “Think of the people who need your support” – 2.9%
 - “Leave before you lose it” – 0.0%
 - “Know when to stop, don’t go over the top” – 2.4%
 - “Don’t chase your losses, walk away, stay in control”- 0.0%
- About eight in ten (83.7%) of respondents recalled hearing the phrase “Gamble Responsibly”. Most commonly, respondents mentioned that they heard this message on television (66.1%), on the radio (34.7%), on posters (22.3%), in newspapers (23.1%), on the internet or internet gambling sites (13.5%), and on TV screens in gambling venues (25.9%).
- When prompted with the phrase “Know when to stop. Don’t go over the top. Gamble responsibly.” 28.7% of respondents claimed to recall hearing this message. This is up slightly from results in the pre-campaign wave where 18.3% of respondents recall this particular message, and slightly higher than the mid-campaign wave (24.7%). Respondents most commonly claimed that they saw the message on a television advertisement (65.1%). On the radio (19.8%), on TV screens at gambling venues (25.6%), in newspapers (19.8%), and on posters (19.8%) are also commonly mentioned by respondents.



Gambling Habits

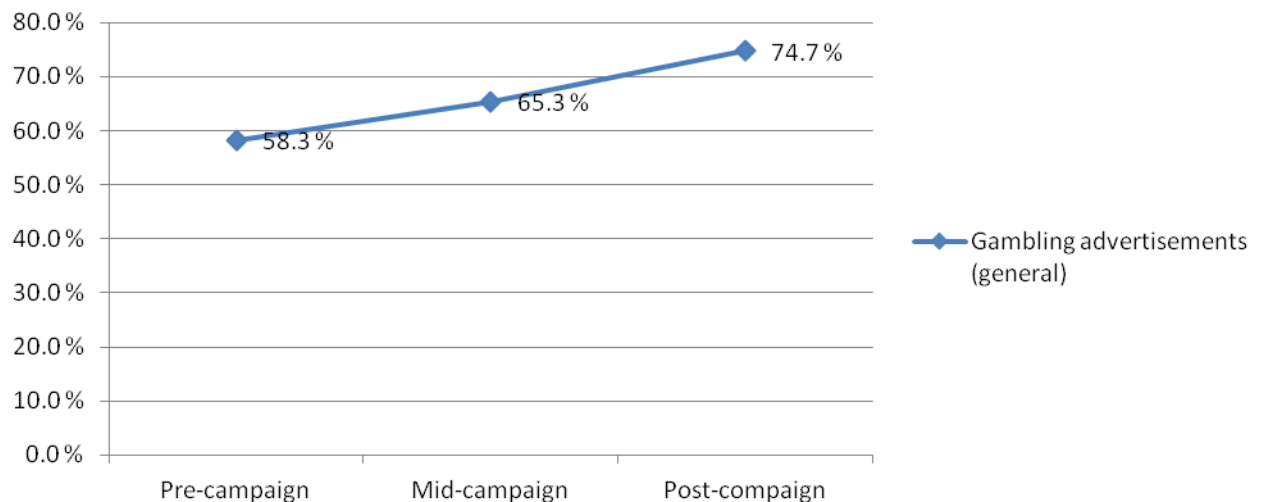
- Four in ten (38.3%) most commonly gamble with SA Lotteries products such as keno or scratchies. Gaming machines (15.7%) are next most common, followed by betting with an SA TAB (7.0%) and playing casino games (4.0%). One third (33.0%) indicate that they rarely or never gamble.
 - Most (76.6%) respondents who play on gaming machines do so at a hotel. A further 10.6% play at a casino while 12.8% play at clubs.
 - Of those who bet with SA TAB, more than six in ten (61.9%) place bets at an SA TAB branch or agency. Three in ten (28.6%) place bets online, one respondent (4.8%) places bets at the races, and one places bets by telephone.
 - Six respondents bet with a bookmaker, and, of those, four place bets online and one does so by telephone and one at the races.
- One third (34.3%) of those who gamble do so weekly or more often. Four in ten (38.3%) gamble less often than weekly to monthly while the remaining one quarter (26.9%) gambles less often than monthly.
- Using a scoring system based on statements about gambling, 8.4% are considered problem gamblers, 10.7% are moderate risk gamblers, 18.1% are low risk gamblers, 29.5% are non-problem gamblers, and the remaining 33.2% are non-gamblers.
- The following graph shows the proportion recalling any advertising relating to gambling, recall of the “Gamble responsibly” message, and claimed recall of the campaign message. In general, those with a higher risk level have a higher recall of the specific advertising.



OVERALL CAMPAIGN SUMMARY

Gambling advertisements

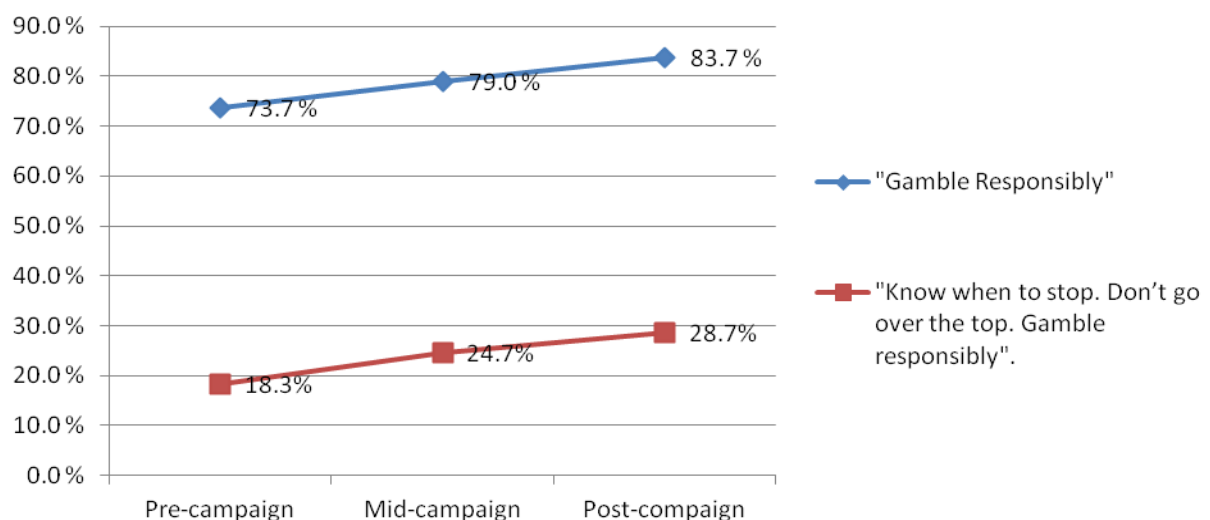
The overall recall rate of general gambling advertisements ranges from just less than six in ten to three quarters within the three waves of data collection.



Message recall

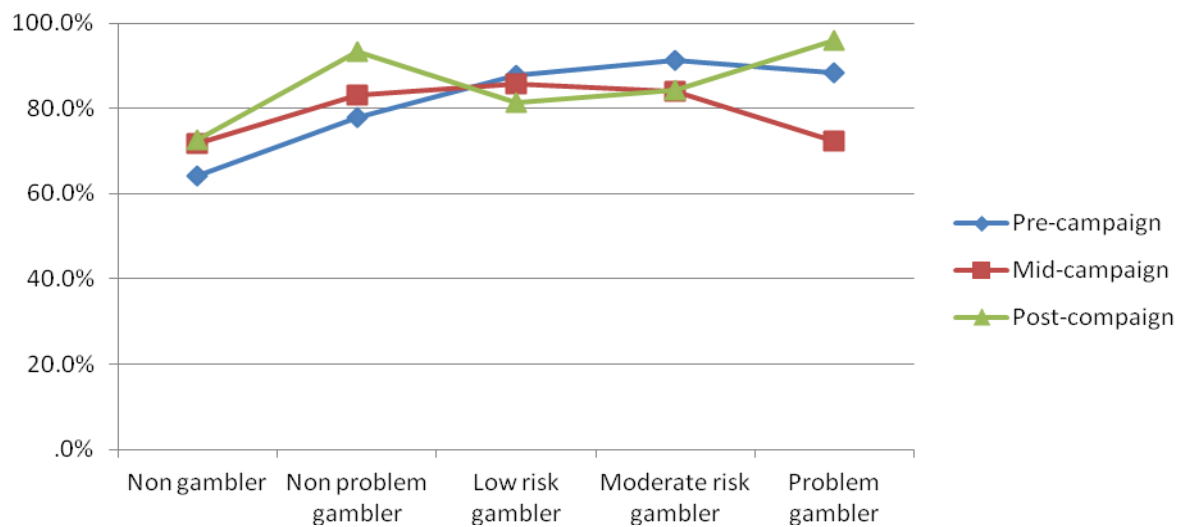
The recall of the “Gamble responsibly” message rose from 73.7% to 83.7% over the three waves after prompting.

Recall of the current campaign phrase, “Know when to stop. Don’t go over the top. Gamble responsibly” achieved a slight lift from 18.3% pre-campaign to 24.7% mid-campaign and 28.7% post-campaign.

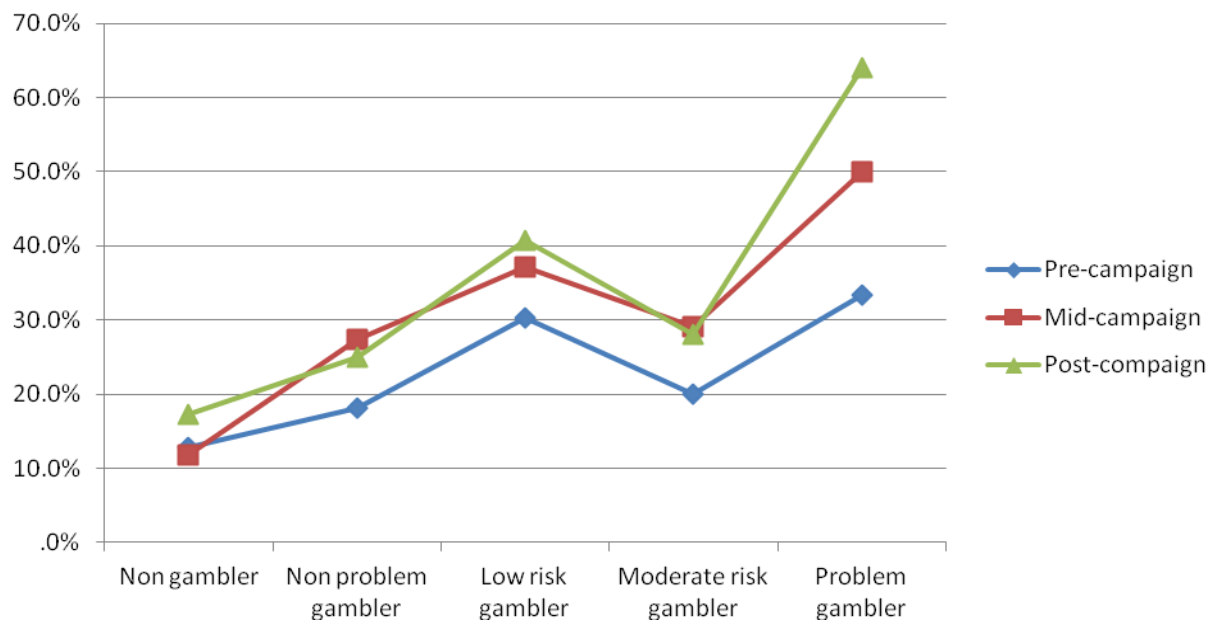


Message recall by gambler type

Respondents who are more at risk for gambling problems tend to have a slightly higher recall rate of “Gamble Responsibly”.



The specific message also has a higher recall rate among those who are of higher risk for gambling problems.



Independent Gambling Authority of
South Australia

SUMMARY FOR MESSAGE 6

***“THINK OF THE PEOPLE WHO NEED YOUR
SUPPORT. GAMBLE RESPONSIBLY.”***

2011

Report submitted 20 December, 2011

Ad recall survey December 2011



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Independent Gambling Authority of South Australia

POST-CAMPAIGN SUMMARY

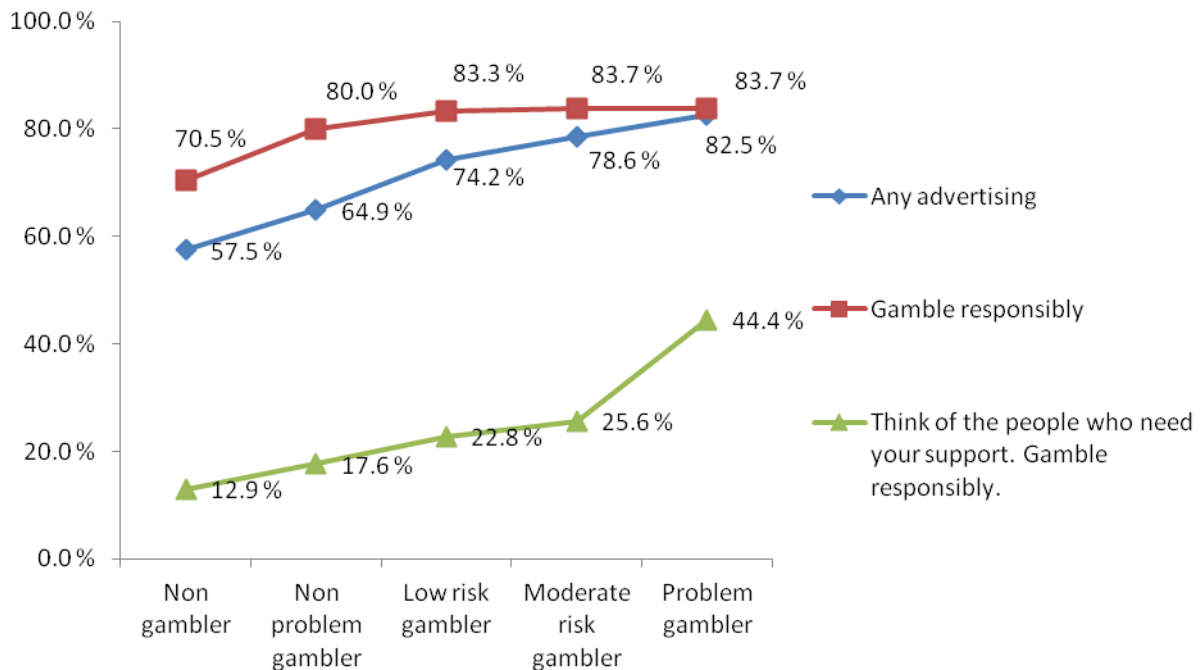
A total of 299 online respondents completed the survey between November 29th and December 9th 2011. This is the third of three waves of research on the 6th of 6 messages measuring advertising recall. The 6th message: “Think of the people who need your support. Gamble responsibly.”

Advertising Recall

- Overall, six in ten (62.5%) of respondents recall seeing, reading, or hearing any advertising related to gambling within the past six months.
- Among respondents who saw the advertising, about four in ten (37.4%) said that it was related to gambling sites, games, or events. Fewer than one in five (16.6%) mentioned advertising related to help for gambling addiction, Gamblers Anonymous, or other anti-gambling promotions. The “Gamble responsibly” message was mentioned by 23.0% of respondents.
- Recall of specific messages remains low. Particular message recall includes:
 - “Think of the people who need your support” – 1.1%
 - “Leave before you lose it” – 0.5%
 - “Know when to stop, don’t go over the top” – 0.0%
 - “Don’t chase your losses, walk away, stay in control”- 0.0%
- About eight in ten (79.3%) of respondents recalled hearing the phrase “Gamble responsibly”. Most commonly, respondents mentioned that they heard this message on television (62.9%), on the radio (33.8%), on TV screens at gambling venues (21.1%), in newspapers (21.1%), on the internet or internet gambling sites (19.0%), and on posters (18.1%).
- When prompted with the phrase “Think of the people who need your support. Gamble responsibly.” 23.7% of respondents claimed to recall hearing this message. This is up from results in the pre-campaign wave where 14.7% of respondents recall this particular message, and slightly higher than the mid-campaign wave (17.5%). Respondents most commonly claimed that they saw the message on a television advertisement (53.5%). On the radio (25.4%), on TV screens at gambling venues (14.1%), in newspapers (23.9%), and on posters (19.7%) are also commonly mentioned by respondents.

Gambling Habits

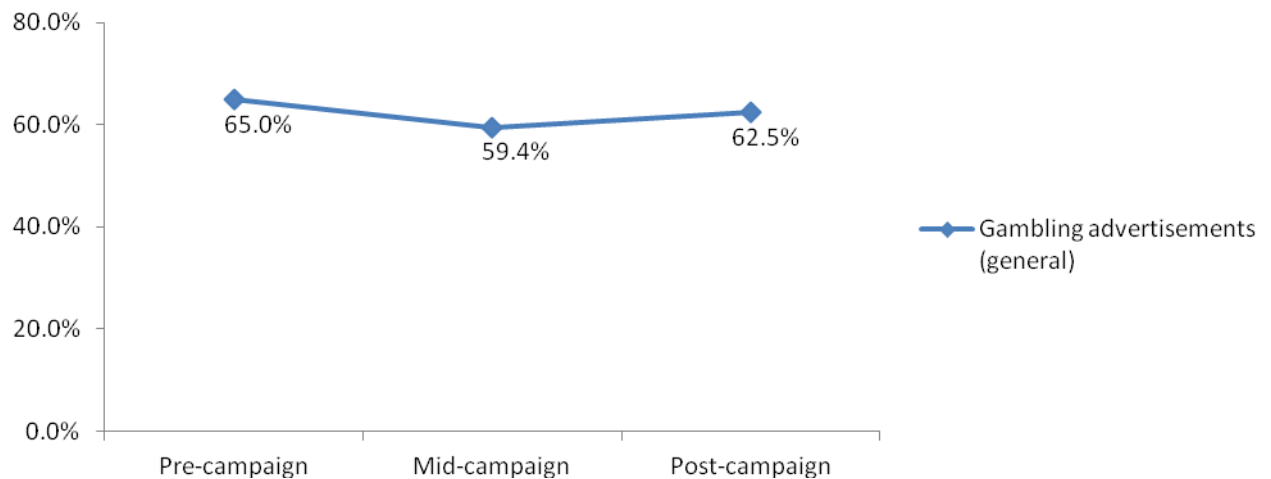
- Fewer than four in ten (34.4%) most commonly gamble with SA Lotteries products such as keno or scratchies. Gaming machines (12.4%) are next most common, followed by betting with an SA TAB (5.4%) and betting with a bookmaker (3.3%). Greater than four in ten (42.1%) indicate that they rarely or never gamble.
 - Most (75.7%) respondents who play on gaming machines do so at a hotel. A further 16.2% play at a casino while 8.1% play at clubs.
 - Of those who bet with SA TAB, nearly six in ten (56.3%) place bets at an SA TAB branch or agency. The remainder (43.8%) place bets online.
 - Ten respondents bet with a bookmaker, and, of those, eight place bets online two at the races.
- Four in ten (41.6%) of those who gamble do so weekly or more often. Three in ten (28.8%) gamble less often than weekly to monthly while the remaining three in ten (29.5%) gambles less often than monthly.
- Using a scoring system based on statements about gambling, 8.4% are considered problem gamblers, 8.0% are moderate risk gamblers, 10.0% are low risk gamblers, 31.4% are non-problem gamblers, and the remaining 42.1% are non-gamblers.
- The following graph shows the proportion recalling any advertising relating to gambling, recall of the “Gamble responsibly” message, and claimed recall of the campaign message. In general, those with a higher risk level have a higher recall of the specific advertising.



OVERALL CAMPAIGN SUMMARY

Gambling advertisements

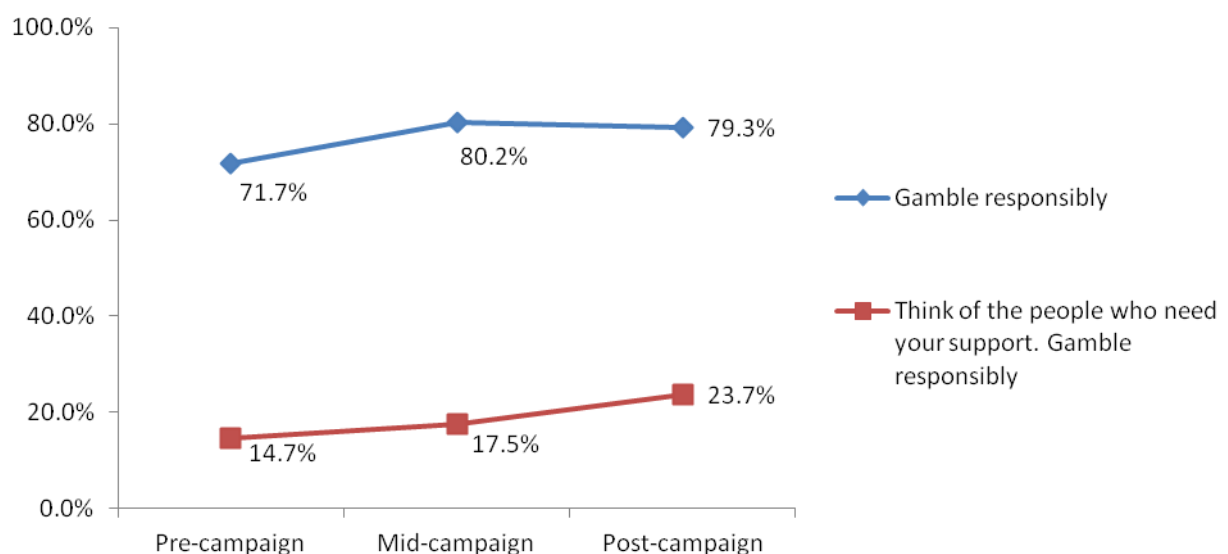
The overall recall rate of general gambling advertisements remains fairly constant within the three waves of data collection dipping slightly to 59.4% in mid-campaign.



Message recall

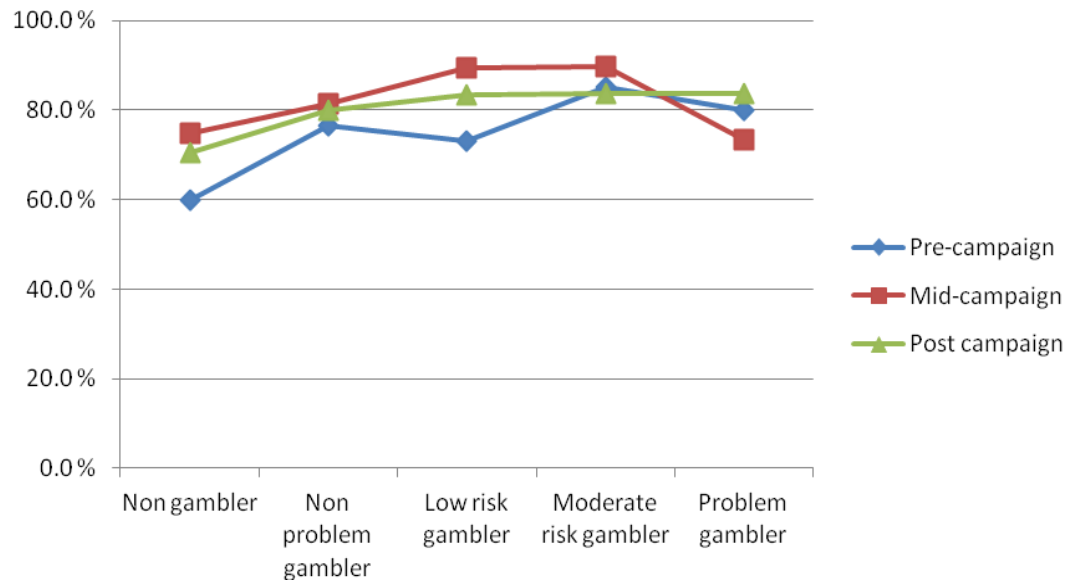
The recall of the “Gamble responsibly” message rose from 71.7% to 79.3% over the three waves after prompting. It peaked slightly in mid-campaign at 80.2%

Recall of the current campaign phrase, “Think of the people who need your support. Gamble responsibly” achieved a steady lift from 14.7% pre-campaign to 17.5% mid-campaign and 23.7% post-campaign.



Message recall by gambler type

Respondents who are more at risk for gambling problems tend to have a slightly higher recall rate of “Gamble responsibly”.



The specific message also has a higher recall rate among those who are of higher risk for gambling problems.

