The role of loyalty programs in gambling: final report of findings from audit of electronic gaming machine gambling venues, literature review, online discussion boards and longitudinal telephone survey

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Gambling Research Australia (GRA) is a partnership between the Commonwealth, State and Territory Governments to initiate and manage a national program of gambling research.

The Secretariat is provided by the Queensland Department of Justice and Attorney-General. Further information about the national research program may be obtained from www.gamblingresearch.org.au

GRA commissioned Market Solutions to undertake a study into the role of loyalty programs in gambling.

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ACRONYMS

ARIMA	Auto Regressive Integrated Moving Average
CATI	Computer Assisted Telephone Interview
CPGI	Canadian Problem Gambling Inventory
DoJ	Department of Justice (Victoria)
EGM	Electronic Gaming Machine
GABS-23	Gambling Attitudes and Beliefs Survey (shorter version)
GABS-7	Seven-items from the Gambling Attitudes and Beliefs Survey (modified from GABS-23)
GLMM	Generalised linear mixed model
GRA	Gambling Research Australia
HSLP	High Success Loyalty Program
IGC	Individual Growth Curves
IRR	Incidence-rate Ratios
LMM	Linear Mixed Model(ling)
LP	Loyalty Program
LPM	Loyalty Program Member/ship
MM	Multilevel Modelling / Mixed effects modeling
MAR	Missing at Random
NFI	No Further Information
PG	Problem Gambler
PGSI	Problem Gambling Severity Index (9-item)
RGM	Responsible Gambling Message
RSL	Returned and Services League
SRG	Social Research Group (a division of Market Solutions)
TGS	TabCorp Gaming Solutions
TSI	Torres Strait Islander

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1 Executive Summary

1.1 Background and study rationale

Australia has one of the highest recreational gambling rates in the world, with approximately 70 per cent of the adult population engaging in some form of gambling each year. Gambling expenditure is dominated by Electronic Gaming Machines (EGMs), which comprise approximately 62% of all spending on gambling. Many EGM venues offer loyalty programs to their patrons. Some states/territories have guidelines around loyalty programs but others do not.

Little research exists on the programs themselves, such as how many EGM venues sponsor loyalty programs, the composition of the programs, how they are marketed, or percentage take-up. Moreover, there is almost no empirical evidence regarding impact of loyalty programs on increased risk of problem gambling.

Social Research Group (a division of Market Solutions) was commissioned by Gambling Research Australia (GRA) and the Department of Justice (DoJ) to undertake *The Role of Loyalty Programs in Gambling* research project.

This research project was designed to answer the following key research questions as posed in the research brief from GRA:

1. Do loyalty programs result in increased EGM gambling (money and/or time and/or number of visits)?
2. Do loyalty programs result in increased risk of problem gambling?
3. Do loyalty programs induce (give people a reason) to visit an EGM venue?
4. Do loyalty programs affect gamblers' control?
5. Do loyalty programs reward "loyalty" (i.e. faithfulness and devotion; they visit that venue rather than another venue) or create "incentive" (i.e. encouragement to gamble more money/for longer)?
6. Which loyalty programs most encourage gambling activities/higher levels of spending/time spent gambling?
7. Is there a greater connection between these "high success" programs[1] and gambling risk level?

[1] "High Success Loyalty Programs" (HSLP) are defined as LPs that include more of the features determined from the literature review that may increase "loyalty". Refer to Section 6.4.7 of the report for a description of these features and the Appendix for an explanation of how this variable was calculated.

1.2 Methodology

This project consisted of four studies conducted in three stages:

- Stage 1:
  - Study 1: Audit of loyalty programs
  - Study 2: Literature review
- Stage 2:
  - Study 3: Online discussion boards
- Stage 3:
  - Study 4: Longitudinal Survey (3 waves)

This report details the methodology, fieldwork procedures, and findings of the four studies. It then provides a discussion of the findings along with some conclusions.

1.3 Audit of gambling loyalty programs in Australia

A total of 367 EGM venues were audited across all Australian states and territories. The data collected were weighted to ensure accurate representation of venue types (casinos, hotels and clubs) within each state and territory so that the data can be generalised to the entire EGM venue population. Key findings from the audit are shown below.

Table 1.1: Key findings from Audit

Key Findings - Audit
1. Around 1 in 5 EGM venues in Australia has a loyalty program (18%).
2. Loyalty programs are most common in casinos (92%, or all but one) and venues with a large number (40+) of EGMs (62%), and least likely in hotels (13%) and venues with a small number of EGMs (3% of small (11-21); 1% of very small (1-10)). Size of venue (i.e. number of EGMs) tends to correlate with venue type; casinos have larger numbers of EGMs while clubs and hotels have smaller numbers.
3. Tasmanian EGM venues are most likely to offer loyalty programs (74%) and these are mostly hotels. Venues in New South Wales and the Northern Territory are least likely (10% and 9%, respectively).
4. Approximately 59% of all EGM venues in Australia have a website. Casinos (100%) and larger venues (42%) are more likely to have a website; this compares with 70% of clubs and 51% of hotels, and 33% of both small and very small venues.

Key Findings - Audit
5. Although Tasmania is more likely than any other state or territory to have a loyalty program, the existence of a loyalty program is unlikely to be evident on their website. These websites do, however, commonly display information about EGMs or gambling activities offered at the venue.
6. Of the 37% of venues that advertise EGMs on their website, 22% of these advertise a loyalty program. Such venues are more likely to be casinos or clubs, large venues, or venues located in Queensland or the Northern Territory.
7. Whereas EGM venues in Queensland are the most likely to promote EGMs and loyalty programs, if they have them, on their websites, they are only moderately likely to actually have a loyalty program (25%).
8. No venues in New South Wales or the ACT have loyalty programs advertised on their websites. Despite this fact, the ACT was found to have the second highest percentage of EGM venues with a loyalty program (44%).
9. Of the 31 venues with a loyalty program mentioned on their website, all but six included some sort of Responsible Gambling Message (RGM).
10. Venues with loyalty programs generally provided detailed information about gambling activities on their website.
11. Most loyalty programs operate on a points-based system that is linked with money spent on gambling activities, but generally also money spent on other venue activities such as food, beverages, and accommodation, if any.
12. Rewards offered across programs vary and are generally associated with redeeming points for discounts/ vouchers to be used at the venue such as on meals and drinks, thus promoting further spending at the venue.
13. Redeeming points or earning gambling credit is another common feature of loyalty programs, as is earning entry into prize draws (mainly to win cash).

1.4 Literature review

The purpose of the literature review was to present the available evidence regarding loyalty programs' efficacy and impact on gambling attitudes and behaviours. A search of the academic and grey literature found a total of 54 relevant articles. Search terms used were: "loyalty programs" OR "rewards programs" OR "membership card(s)" WITH OR WITHOUT gamblers/gambling; electronic gambling machines/poker machines/pokies/slot machines/fruit machines; Australia. The grey literature was searched using Google Scholar, as well as by searching the government website in each state or territory responsible for gambling, and gambling research organisations. Of the 54 articles found, only two were Australian; the remaining were international. Sixteen of the articles were specific to the gambling industry; 19 about industries other than gambling; and 19 about loyalty programs generally. All of the international gambling loyalty program articles were about casinos and all but one of these discussed casinos in the United States.

One of the Australian articles that discussed loyalty programs was a qualitative study of gambling marketing involving interviews with 100 Victorian gamblers; the other was an examination of the marketing strategies of Australian casinos with its purpose to advise casino managers on how to better promote their product. The Victorian study, while not focused exclusively on loyalty programs, did find that high risk and problem gamblers (PGs), and gamblers from lower socio-economic groups, view loyalty programs more positively and with less concern about possible risks than do other groups.

The international literature on gambling loyalty programs, loyalty programs in industries other than gambling, and loyalty programs in general provide similar findings. All of these articles are written from a marketing perspective, with none discussing possible adverse effects of the programs on customers and instead considering only potential gains by industry. Most of the literature focuses on the question of whether loyalty programs "work"; several articles are dedicated to describing "best practices" for loyalty programs.

Loyalty programs are one of a number of marketing tactics designed to increase purchases and foster customers' loyalty. Loyalty programs are different from "inducements", which are one-off benefits such as free meals, gifts and account credits and which therefore do not reward or encourage repeat purchase. The elements of a typical loyalty program involve members earning loyalty points, or the equivalent, for buying from the loyalty program provider. Accumulated points can then be exchanged for discounts, gifts, or membership in higher loyalty program tiers. Most researchers agree that a goal of loyalty programs is to build both attitudinal and behavioural loyalty toward the company or brand. However, there is some disagreement about whether loyalty is the end goal of loyalty programs or whether it is something else such as company profit. A few researchers argue that ultimately behavioural loyalty is all that matters. Effects of loyalty programs are often explained by either economic utility theory or drawn from equity theory. According to economic utility theory, loyalty programs provide rewards that enhance the value and utility of a product or service, thus increasing the likelihood of current and future purchases. According to equity theory, however, customers compare their purchase input, such as money, time, effort

etc., with outputs or gains to evaluate whether they have been treated equitably in the process (Bu, Kim, Lee, & Lee, 2009).

Gambling policy in Australia is largely the responsibility of the states rather than the Commonwealth. The states and territories have a variety of regulations and guidelines that affect or potentially affect gambling loyalty programs based on a number of acts, codes, and other legislation. Key findings from the international literature on loyalty programs are shown below.

Table 1.2: Key findings from Literature Review

Key Findings – Literature Review
1. The evidence regarding effectiveness of loyalty programs as a whole is mixed, with most reviews concluding that effects are positive but small.
2. Tiered programs appear to be more effective than non-tiered programs.
3. Both reward distance (number of points required to redeem a reward) and step size (number of points earned per dollar) appear to affect loyalty, although these effects are moderated by customer step-size ambiguity (uncertainty regarding how many point they receive per dollar spent) and program magnitude (absolute sizes of the reward distances and step sizes). This finding, however, is based on only one article involving two studies.
4. Type of rewards (direct – tied to the brand, or indirect), timing of rewards (immediate or delayed), magnitude of rewards, and frequency of rewards may all impact on effectiveness of loyalty programs, but that impact varies depending on individual consumers' situations and attributes.
5. Loyalty programs may be relatively more effective with particular sub-groups of gamblers, although there appears to be little consensus and some contradictory findings regarding which groups. Various studies identify the following groups as "best targets" for loyalty programs: those with high attitudinal loyalty even if they are low in behavioural loyalty; "loyal big spenders" and "transient big spenders"; "elite elders"; low- and moderate-frequency buyers (but not high-frequency buyers); single loyalty program members (vs. people with multiple memberships); men if the loyalty program emphasises status when that higher status is highly visible to others but women if the program emphasises personalisation in a private setting; and particular demographic groups of interest to marketers in the United States, including "emerging Hispanics" (recent arrivals with modest incomes).
6. There is mixed evidence regarding the role of customer satisfaction in loyalty. There is disagreement regarding whether customer satisfaction is an independent driver of loyalty rather than as a mediator of its effects on company performance. There is also some argument as to whether customer satisfaction has any correlation at all with loyalty.

Key Findings – Literature Review
7. A few studies discuss aspects of loyalty program effectiveness that fall outside the topics of program structure, rewards, or consumer segments. These include relational equity[2] and relationship age, communication of the loyalty program to members, and loyalty program distinctiveness and identify relevance.[3]
8. A single study found that relational equity has a positive independent influence on both attitudinal and behavioural loyalty and that the effects of relational equity increase along with relationship age.
9. Two studies examined associations between how a loyalty program is communicated to customers and loyalty. The first found that the channels through which the program is communicated, the style and quality of that communication, and the extent to which a communication message matches someone's image of themselves all impact on loyalty. The second found that rewards are best communicated as "additional perks" provided to loyalty customers at the company's expense and that an effective loyalty program involves developing a program that fits with its customers' needs, both in terms of their spending behaviours and program requirements, as well as emotional needs.
10. A single study found that the distinctiveness of a loyalty program and its identity relevance both ultimately influence loyalty.
11. In terms of "best practice" in loyalty programs, a number of researchers argue that the real value of loyalty programs is not in changing attitudes or behaviours or indeed increasing "loyalty" but in compiling a detailed customer database on customers' demographics and spending habits, which can then be used for targeting marketing activities.

Initially it seems plausible to apply evidence regarding international loyalty programs to Australian gambling loyalty programs. However, a number of differences between the context of loyalty programs in other countries and Australia suggest caution. These differences include:

- The high level of saturation of the loyalty program market outside of the Australian gambling industry. In these industries, most companies have a loyalty program and most consumers are members of multiple programs. As a result of this high level of saturation, companies often find it difficult to distinguish their program from others, and consumers are able to compare programs and choose the one or ones they like best. From our audit of EGM venue gambling loyalty programs, we know that only approximately 18% of venues have a loyalty program, and although a considerable percentage of LPMs may belong to more than one LP (approximately 22% of our survey

[2] Costabile et al., (2008) define "relational equity" as 'the customer perception of the proportionality between her or his own benefit-cost ratio and the firm's benefit-cost ratio within a continuous customer-provider relationship'.
[3] Ha (2008) defines "identity relevance" as the fit between rewards offered by a loyalty program and a consumer's identity needs (i.e. goals).

sample), it appears that few compare programs (in fact, none of our online discussion board participants compared programs).

- All of the international gambling loyalty program literature is about casino loyalty programs, which may resemble Australian casino loyalty programs, but perhaps not those provided by clubs or hotels.
- Several of the U.S. casino studies discuss the impact of the recession in the U.S. on the gambling industry there, resulting in casinos fighting harder at lower profit margins for a shrinking number of gamblers and dollars. This is a somewhat different scenario than exists in Australia.

The gaps in the evidence base regarding the impact of loyalty programs on gamblers, and particularly at-risk gamblers, are huge. They include:

- An almost complete lack of studies on Australian gambling loyalty programs
- An almost complete lack of loyalty program literature written from other than a marketing perspective
- A dearth of evidence regarding the differential impact of loyalty program on various sub-groups of gamblers, and specifically on problem or high-risk gamblers
- A limited number of studies on how various aspects of loyalty programs, such as the structure of the program, types of rewards, manner in which the program is communicated, and so on, impact on gamblers, and particularly problem and at-risk gamblers
- An almost complete lack of literature regarding whether a “successful” loyalty program merely increases loyalty to one brand (or venue) at the expense of another, resulting in a zero-sum gain in terms of total amount spent or time, or whether in fact it increases total spending.

1.5 Online discussion boards

A total of six online discussion boards were held with loyalty program members, grouped by primary EGM venue (casino; club; pub/hotel) and problem gambling risk as measured by the Problem Gambling Severity Index (PGSI) (non/low/moderate-risk; problem gambler). The Club_High group included "moderate-risk" gamblers as well as "problem gamblers". After this first group was conducted, it was determined that the views of moderate-risk gamblers were more similar to those of lower-risk gamblers than to problem gamblers; for the rest of the groups we therefore included moderate-risk gamblers with the low and non-problem gamblers.

A total of 300 people were recruited for the discussion boards (i.e. agreed to participate); 200 logged on and participated. Each board was open for a total of two weeks – one week during which daily topics were posted, and an additional week for any additional comments. Active participants were offered $50 vouchers to thank them for their time and effort.

Table 1.3: Composition of Online Discussion Boards

	Pub/Hotel Low	Pub/Hotel High	Club Low	Club High	Casino Low	Casino High
PGSI categories included	Non/low/ mod	PG	Non & Low	Mod & PG	Non/low/ mod	PG
Dates board open	5-18 May	5-18 May	5-18 May	7-20 Apr	5-18 May	5-18 May
Number of participants recruited	50	50	50	50	50	50
Number of active participants	35	35	38	36	29	27

Participants included a mix of genders, ages and locations. Women made up a majority on four of the six boards. Men were a slight majority on both of the casino boards. Women were a large majority (64% of participants) on the Club_High board. Participants on the Casino_High board were significantly younger than those on the other boards, with more than half of participants aged 34 years or younger. The Club_Low board contained a relatively greater percentage of older participants, with more than half aged 55 or older. Most participants were from New South Wales, Queensland and Victoria, with significant percentages of participants on the Pub/Hotel boards from South Australia. A very low percentage (6%) of Casino_Low participants were from New South Wales. In Western Australia, EGMs are located only in the casino.

Table 1.4: Key findings from Online Discussion Boards

Key Findings – Online Discussion Boards
1. Most participants, when directly asked, stated that their loyalty program membership does not affect their gambling behaviour. However, other comments by some of these same participants revealed that in fact this may not be the case.
2. Venues actively induce patrons to join their Loyalty Program Membership (LPM). These inducements include: a. Clubs: making LPM an automatic part of their club membership b. Pubs/Hotels: Staff approaching patrons about the Loyalty Program (LP) and sometimes even filling out the paperwork for them c. Pubs/Hotels: Requiring that anyone who lives within a certain distance of the venue must join the LP in order to attend the venue
3. Many participants admitted they do not really understand how their LP works.
4. Almost no participants said they received information regarding money and time spent gambling, although most said they received information regarding point accumulation.
5. Even participants who enjoyed their LP and saw no ill effects of being a member on their own gambling behaviours often expressed somewhat ambivalent attitudes about gambling loyalty programs in general.

1.6 Three-wave longitudinal telephone survey

A three-wave, longitudinal telephone survey was conducted with over 1,000 people who either play EGMs or have an interest in playing EGMs. Each wave of data collection took place approximately six months apart. Respondents included significant numbers of moderate-risk and problem gamblers (as measured by the PGSI) and loyalty program members. Survey length was approximately 20 minutes.

Survey participants were recruited from various sources and using a combination of methods:

- Users of Facebook and Google
- Subscribers to the Pro Punter newsletter
- Members of a consumer panel
- Contacts of professional recruiters
- Listings in a commercially available telephone database

The content of the survey instrument was informed by findings from the audit of loyalty programs, literature review, online discussion boards and input from our topic experts.

The primary analytical approach used was individual growth curves analysis, a technique within mixed modelling. Such an approach has a number of advantages over other, less sophisticated approaches to analysis of longitudinal data, resulting in more accurate and precise findings.

Control variables included the following: time, gender; age; main activity; household income; personal income; PGSI score (for models other than that with PGSI score as the outcome variable); gambling frequency (for models other than that with gambling frequency as the outcome variable); and interactions between each of the predictor variables and time. The table below presents the impact of LPM on the outcome variable, holding the above variables constant.

Table 1.5: Key findings from Survey

Key Findings - Survey
1. **Loyalty program membership is associated with amount of money spent gambling** on the previous gambling occasion. Loyalty program members spend, on average, 1.37 times more money per gambling occasion than do non-LPMs, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2[4]).
2. **Loyalty program membership is associated with amount of time usually spent gambling.** Loyalty program members usually spend, on average, 1.23 times more hours gambling than do non-LPMs, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
3. **Loyalty program membership is associated with gambling frequency**. Loyalty program members gamble on average 1.27 times as frequently per year as compared with non-LPMs, after any effects of gender, age, main activity, household and personal income, PGSI score, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
4. Loyalty program membership is associated with increased feelings around incentive to gamble, as measured by seven items from the Gambling Attitudes and Beliefs Survey (GABS-23). Loyalty program members score, on average, 0.50 points higher than non-LPMs on the 22-point scale, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
5. **Loyalty program membership is associated with increases in risk of problem gambling**, as measured by PGSI category. Loyalty program members have, on average, 2.68 times the odds of being a "moderate-risk" or "problem" gambler as measured by the PGSI as compared with non-LPMs, after any effects of gender, age, main activity, household and personal income, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
6. Loyalty program membership does not appear to be associated with a reduction in feelings of ability to stop or reduce gambling. Loyalty program members have on average 0.98 times the odds of agreeing that they can easily either stop or reduce their gambling as compared with non-loyalty program members, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (wave 2).

[4] Because the time variable is best modelled as discrete rather than continuous, reported effects are thus as at the middle time-point, or wave 2.

Key Findings - Survey
7. **Loyalty program membership may be associated with increased binge gambling[5] although the significance level does not reach the threshold of p <.05.** Loyalty program members have on average 1.33 times the odds of having binged on gambling in the past 12 months as compared with non-LPMs, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2) (p =.18).
8. Whereas **loyalty program membership is associated with incentive to gamble** (as measured by time/money spent gambling and gambling frequency) **LPM is not associated with increased venue loyalty**, as measured by number of venues where gamblers gamble, and in fact is associated with an *increase* in the number of venues attended. Loyalty program members have on average, 2.67 times the odds of playing EGMs at two or more venues in the previous 12 months as compared with non-LPMs, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
9. **"High success" loyalty programs[6] do not appear to be associated with greater amounts of money spent gambling**. Each one-point increase in High Success Loyalty Program (HSLP) score is associated with 0.99 times the amount spent gambling on last occasion as compared with non-LPMs, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
10. **"High success" loyalty programs are associated with greater amounts of time spent gambling although the effects size is small**. Each one-point increase on the nine-point HSLP score is associated with 1.05 times the number of hours spent gambling, after any effects of gender, age, main activity, household and personal income, PGSI score, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2).
11. **"High success" loyalty programs may be associated with increased risk of problem gambling** as measured by the PGSI although the significance level does not meet the threshold of p <.05. Each one-point increase in HSLP score is associated with 1.21 times the odds of being in the "moderate-risk/problem gambling" category after any effects of gender, age, main activity, household and personal income, gambling frequency, survey wave and interactions between each of the predictor variables and survey wave are taken into consideration (at wave 2) (p =.12).

[5] For purposes of this study, "binge gambling" is based on the following question, from the Victorian Gambling Study: "On how many days in the past 12 months did you binge on gambling – that is, spend a significantly larger than usual amount in a shorter than usual period of time?" (State of Victoria, Department of Justice 2011)

[6] The definition of "High success" LPs was based on findings from the literature review regarding components of "more successful" loyalty programs. A higher HSLP score indicates a LP with a greater number of such components. Attr butes included are listed in section 6.4.7 of the report. In addition, a table explaining how the HSLP variable was calculated is included in the Appendix.

These results from the longitudinal survey indicate that loyalty programs are significantly associated with several measures of gambling behaviours and risks. The non-significant finding for binge gambling may be due to the very low levels of binge gambling among gambling respondents, with almost three-quarters (74%) of gamblers reporting zero days of binge gambling in the prior 12 months, and only 9% reporting four days or more. Although not statistically significant, LPMs nevertheless have 1.33 times the odds of binge gambling as compared with non-LPMs. This possible association between LPM and binge gambling deserves further research. There are several possible explanations for the mixed results regarding impact of “high success” LPs. One is that many respondents belonged to more than one LP, with 21.7% belonging to two or more, but respondents were asked details only about the LP they used most. It is likely that this dilutes the impact of any one LP. Other possible explanations for these results of non-significant impact are discussed in the overall study discussion section.

1.7 Discussion

From the audit, we find that just 18% of EGM venues have loyalty programs, although these tend to be in the casinos and larger venues, and many gamblers belong to more than one LP, which suggests that their reach may be greater than indicated by the prevalence rate.

From the audit, discussion boards and survey, we conclude that LPs in Australia currently are not particularly sophisticated or aggressive in their marketing, at least as compared with LPs internationally, although they do include practices such as including LPM with general club membership and staff approaching patrons at venues to sign them up to the LP. Little evidence exists in the literature regarding impact of gambling LPs on gambling behaviours.

Based on all four studies, we draw the following conclusions regarding the impact of LPs on gambling behaviours:

Research question	Finding	Based on which study(ies)
1. Do loyalty programs result in increased EGM gambling (money and/or time and/or number of visits)?	Likely. There appears to be an association.	Disc bds; survey
2. Do loyalty programs result in increased risk of problem gambling?	Likely. There appears to be an association.	Disc bds; survey
3. Do loyalty programs induce (give people a reason) to visit an EGM venue?	Maybe. Mixed findings from disc bds and survey	Disc bds; survey
4. Do loyalty programs affect gamblers' control?	Probably not to any great extent	Disc bds; survey
5. Do loyalty programs reward "loyalty" (i.e. faithfulness and devotion; they visit that venue rather than another venue) or create "incentive" (i.e. encouragement to gamble more money/for longer)?	Likely incentive but perhaps not loyalty.	Disc bds; survey
6. Which loyalty programs most encourage gambling activities/higher levels of spending/time spent gambling	HSLPs associated with increased time but not money spent	Literature review; disc bds; survey
7. Is there a greater connection between these "high success" programs and gambling risk level?	Maybe. Positive association from survey but not statistically significant	Disc bds; survey

1.8 Limitations

- Information about LPs for the audit was gathered by looking at the venue's website (if it had one) and talking with someone at the venue on the telephone, rather than visiting the venue in person, which appears to be how most LPMs find out about loyalty programs. It is possible that different or additional information may have been gathered with an in-person approach. It is also possible that the particular individual answering the telephone provided different information than might have been gathered by talking with a different staff member.
- Because LPMs who participated in the online discussion boards knew that the topic of discussion was loyalty programs, it is possible that LPs came up more often in discussions than might otherwise have been the case.
- Many of the behaviour questions in the survey asked about behaviours over the prior 12 months, but data collection waves were six months apart.
- Venue "loyalty" is a difficult concept to operationalise in a survey. We might look at number of venues where one holds a LPM as a proportion of number of venues where one plays EGMs, with perfect loyalty equal to 1; however, this would mean that anyone who did not belong to a LP would have a loyalty score of '0'. We therefore examined number of venues where someone played EGMs, hypothesising that this number would be lower on average for LPMs than non-LPMs after controlling for gambling frequency. However, this may not be the case. For example, it may be that number of venues does not change, but that frequency of venue attendance at LP venues is higher than at non-LP venues.
- Computation of the HSLP variable was based on findings from the literature regarding what constituted "successful programs", but was not independently tested.
- The longitudinal survey was conducted over only a 12-month period whereas behaviour change, including both LPM and gambling behaviours, is normally a slow process. Results therefore likely underreport the true impact of LPs on gambling behaviours.

2 Introduction

2.1 Background

Australia has one of the highest recreational gambling rates in the world, with approximately 70 per cent of the adult population engaging in some form of gambling each year. Gambling expenditure increased substantially in the 1990s, mostly due to the liberalisation of gaming laws, and has since then stabilised. Most gamblers engage in gambling for entertainment without harmful effects. A small percentage of gamblers, however, encounter difficulties, with approximately 0.5% to 1.0% characterised as “problem gamblers” and an additional 1.4% to 2.1% identified as being “at risk” of developing a problem. These figures, however, exclude binge gambling, which may underestimate rates of problem gambling by as much as 35% (Productivity Commission 2010).

Gambling expenditure is dominated by EGMs, which comprise approximately 62% of all spending on gambling. Just over half of this expenditure takes place in clubs and hotels, with the remaining in casinos. This percentage, however, varies widely by jurisdiction, with expenditure from clubs and hotels representing approximately 73% in South Australia but 0% in Western Australia where EGMs are allowed only at the casino. Not only do EGMs comprise the majority of Australian gambling revenue, but also they are overrepresented among problem gamblers seeking treatment, with various characteristics of EGMs contributing to their addictive quality. Because of the above factors, EGM gambling has been the focus of much of the research conducted on gambling and, specifically, harm minimisation (Productivity Commission 2010).

Some EGM venues offer loyalty programs to their patrons. These programs often involve the issuing of loyalty cards, which allow players to accumulate points that can be traded in for prizes, raffle tickets or coupons that can then be converted into credits for use on EGMs (Delfabbro, 2011). Loyalty program members may also receive exclusive emails and newsletters to keep them up-to-date with the latest offers and benefits, and the ability to check and redeem their points online. Most casino loyalty programs provide privileges such as affinity groups, frequent buyer or visitor program and customer clubs, and allow members to gain special access to private events, cash- back programs, and exclusive entry to VIP gambling tables or even free parking. Most casinos return to members a certain percentage of their play money, to encourage the members to play and return (Koo, Lee, & Ahn, 2012).

Some states have guidelines around loyalty programs. For example, Queensland’s *Responsible Gambling Guidelines* state that individuals should not be emailed or direct-marketed about gambling products, including loyalty programs, if they have not consented to receiving such materials. And in some jurisdictions, gambling advertising must include problem gambling or harm minimisation measures (Thomas, Lewis, McLeod, & Haycock, 2011).

The limited research on loyalty programs does not generally find a large connection between loyalty programs and increases in problem gambling (Koo et al., 2012). However, almost all of this research has been qualitative and based on gamblers' perceptions, which limits the ability to draw definite conclusions. There is concern that loyalty programs provide an inducement to individuals to play EGMs more often and for longer periods of time than would otherwise be the case and to potentially reduce a gambler's capacity to maintain control over their gambling behaviour (Productivity Commission 1999). Moreover, there is some research suggesting that advertising may have a greater impact on the gambling behaviour of problem gamblers than of non-problem gamblers (Thomas et al., 2011). Not only is there limited empirical research on connections between loyalty programs and problem gambling, but also there appears to be little information about the programs themselves, such as how many EGM venues sponsor loyalty programs, the composition of the programs, how they are marketed, or percentage take-up.

2.2 Research objectives

Key questions to be answered by this research project include:

1. Do loyalty programs result in increased EGM gambling (money and/or time and/or number of visits)?
2. Do loyalty programs result in increased risk of problem gambling?
3. Do loyalty programs induce (give people a reason) to visit an EGM venue?
4. Do loyalty programs affect gamblers' control?
5. Do loyalty programs reward "loyalty" (i.e. faithfulness and devotion; they visit that venue rather than another venue) or create "incentive" (i.e. encouragement to gamble more money/for longer)?
6. Which loyalty programs most encourage gambling activities/higher levels of spending/time spent gambling?
7. Is there a greater connection between these "high success" programs and gambling risk level?

2.3 Project overview

Social Research Group (a division of Market Solutions) was commissioned by GRA and DoJ to undertake *The Role of Loyalty Programs in Gambling* research project.

This project consisted of four studies conducted in three stages:

- Stage 1:
    - Study 1: Audit of loyalty programs
    - Study 2: Literature review
- Stage 2:
    - Study 3: Online discussion groups
- Stage 3:
    - Study 4: Longitudinal Survey (3 waves)

This report details the data collection methodology, fieldwork procedures, and findings of all stages of the project. It then provides a discussion of the findings along with some conclusions.

2.3.1 Study 1: Audit of loyalty programs

The audit was designed to answer the following key questions:

1. What percentage of EGM venues in Australia have loyalty programs? Do these percentages differ by State/Territory and by type of venue (casino; club; hotel)?
2. How do the loyalty programs work? How do you build up rewards points?
3. What sorts of rewards can you get?
4. Are the programs linked to non-gambling activities?
5. How do you enrol? Is membership free or is a fee charged?
6. How are the loyalty programs marketed (e.g. Are they on their website? Can you enrol online or over the telephone or do you need to visit the venue? Do they send out newsletters or other communications about the program?)
7. How do loyalty programs differ by State/Territory and by type of venue (casino; club; hotel)?

The audits of EGM venues were undertaken during the last two weeks of February 2014. Please note that any legislation referred to in the discussion of audit findings is legislation in place as at this date. A total of 367 venues including casinos, clubs, and hotels were selected using a stratified sampling approach based on State/Territory and venue type from an estimated 5,696 EGM venues across Australia.

Each venue audit was completed in two stages:

- Stage 1: Venues researched to establish online presence and identification of EGMs and/or a loyalty program at venue. Prominence of EGMs or loyalty programs on website and ease of location/ navigation also recorded.
- Stage 2: Venues called by auditor posing as potential customer to confirm existence of loyalty program. Details regarding how the program works, key features and rewards, and how one would go about joining the program were also sought. Venues asked to send out additional information by email.

2.3.2 Study 2: Literature review

The purpose of the literature review was to present the evidence regarding loyalty programs' efficacy and impact on gambling attitudes and behaviours. A preliminary review of the literature on loyalty programs conducted at the proposal stage indicated that there is little information on gambling loyalty programs either in Australia or overseas. This review therefore widened the net to include literature on loyalty programs in general, as well as in industries outside of gambling for which the findings may be applicable to the gambling industry. Findings from the literature review and audit assisted the development of the online discussion board topic questions and survey instrument.

The literature review was conducted during January through April 2014. A total of 54 articles were included in the review comprising a mix of academic and grey literature. These were derived from systematic searches of electronic databases conducted by two researchers independently. Search terms consisted of: "loyalty programs" OR "rewards programs" OR "membership card(s)" WITH OR WITHOUT gamblers/gambling; electronic gambling machines/poker machines/pokies/slot machines/fruit machines; Australia.

The articles chosen met the following inclusion criteria:

- any academic article or publicly available report on a government or gambling research organisation website
- in English
- published within the past 10 years (2004-on[7]) about customer loyalty programs.

[7] Two exceptions to this date restriction were one article published in 2002 and another in 2003 that were deemed significant enough to include in the review.

2.3.3 Study 3: Online discussion boards

The purpose of the online discussion boards was to provide in-depth, qualitative data on personal experiences of LPMs who belong to loyalty programs and perceptions regarding impact of the programs on attitudes and behaviours around gambling.

Six discussion boards were conducted in April and May 2014. A total of 300 loyalty program members were recruited to the boards via various channels including cold calling, snowball sampling, professional recruitment and advertising in gambling newsletters and on social media. Two-hundred LPMs participated on the boards. Prior to participating, potential participants were screened for EGM playing and loyalty program membership. Additionally, they were classified according to:

a) Type of (primary) venue with loyalty card membership (casinos; hotels; clubs).
b) Level of risk as assessed by the 9-item Canadian PGSI (non-problem; low-risk; moderate-risk; problem gambler).

The groups/ discussion boards conducted were as follows:

- Group 1 – Clubs: Moderate Risk & Problem Gamblers (Clubs_high)[8]
- Group 2 – Casinos: Problem Gamblers (Casinos_high)
- Group 3 – Hotels: Problem Gamblers (Hotels_high)
- Group 4 – Clubs: Low Risk & Non-Problem Gamblers (Clubs_low)
- Group 5 – Casinos: Low/Moderate Risk & Non-Problem Gamblers (Casinos_low)
- Group 6 – Hotels: Low/Moderate Risk & Non-Problem Gamblers (Hotels_low)

After recruitment, participants were sent an email introducing the purpose of the discussion and informing them of the basic features of the board. Each board ran for two weeks, with several new discussion topics posted daily for the first seven days. Participants were alerted via email when new topics were posted. Discussion topics were informed by the literature review as well as input from topic experts, and were approved by GRA prior to posting.

[8] Moderate gamblers were included with problem gamblers in the Casino group but not in the other groups. After conducting this first group it was determined that the behaviours and attitudes of “moderate-risk gamblers” were often quite different from those of “problem gamblers” and more similar to those of lower-risk gamblers.

2.3.4 Study 4: Longitudinal panel survey

In order to provide best evidence regarding impact of loyalty programs on gambling risk over time, a longitudinal panel survey was conducted over three waves at six monthly intervals.

Specifically, this survey aimed to answer the following key research questions:

1. Do loyalty programs (LPs) increase gambling: amount of money or time spent gambling, or gambling frequency?
2. Do LPs result in increased risk of problem gambling?
3. Do LPs result in reduced feelings of control around gambling?
4. Do LPs reward “loyalty” (i.e. faithfulness and devotion; they visit that venue rather than another venue) or create “incentive” (i.e. encouragement to gamble more money/for longer)?
5. Do “high success” LPs result in more money or time spent gambling, and/or increase gambling risk?

Survey participants were recruited from various sources and using a combination of methods:

- Users of Facebook and Google
- Subscribers to the Pro Punter newsletter
- Members of a consumer panel
- Contacts of professional recruiters
- Listings on a commercially available telephone database

The survey sample was stratified by:

- level of gambling risk according to the PGSI and by type of player
- current EGM player and a loyalty program member
- current EGM player and not a loyalty program member
- not a current EGM player but express some interest

In order to qualify for the research, participants had to be aged 18 years or older and either have played the EGMs in the past 12 months or indicate that they were likely to play EGMs in the future (i.e. some interest in playing).

Interviews were conducted by telephone using a Computer Assisted Telephone Interview (CATI) approach. The total number of interviews completed for each wave was as follows:

- 1,463 – wave 1
- 1,188 – wave 2
- 1,118 – wave 3

The average interview length was 20 minutes, although this varied from participant to participant depending on how recently they had gambled / played EGMs and whether they were a member of a loyalty program.

2.4 About this report

This report consists of the following sections:

- Study 1: Audit of Gambling Loyalty Programs
- Study 2: Literature Review
- Study 3: Online Discussion Boards
- Study 4: Longitudinal Telephone Survey
- Discussion
- Conclusions
- Appendixes

Appendices include the following:

- Audit form
- Audit tables
- Relevant gambling legislation[9]
- Brochures and other information sent by LP venues
- Discussion board topic guide
- Survey participant recruitment form
- Survey instrument (wave 1)
- Detailed analysis approach
- Detailed analysis – interim models

[9] This information has been updated to reflect changes to legislation since the audit was conducted in March 2014 and was current as at November 2015.

- Survey results tables
- Computation of HSLP variable

3 Audit of gambling loyalty programs

3.1 Objectives

The audit was designed to answer the following key questions:

1. What percentage of EGM venues in Australia have loyalty programs? Do percentages differ by state/territory and by type of venue (casino; club; hotel)?
2. How do the loyalty programs work? How do you build up rewards points?
3. What sorts of rewards can you get?
4. Are the programs linked to non-gambling activities?
5. How do you enrol? Is membership free or is a fee charged?
6. How are the loyalty programs marketed (e.g. Are they on their website? Can you enrol online or over the telephone or do you need to visit the venue? Do they send out newsletters or other communications about the program?)
7. How do loyalty programs differ by state/territory and by type of venue (casino; club; hotel)?

3.2 Methodology

3.2.1 Venue selection

At the start of the audit there were estimated to be 5,696 EGM venues in Australia comprising casinos, clubs, and hotels (Productivity Commission 2010). The total sample of 367 venues included all 13 casinos. The remaining 354 venues were randomly selected within state/territory and venue type in order to provide a +/- 5% confidence interval at a 95% confidence level prior to weighting.[10] Some oversampling within smaller cells (e.g. hotels in the ACT) was undertaken in order to be able to provide a complete picture of loyalty programs across Australia.

[10] A key sample proportion of 50% (most conservative assumption) estimated with a tolerance of +/-5% at a 95% level of confidence would require a sample size of 360 venues. Formula: ss = [Z2*(p)*(1-p)/c2]/[1+(ss-1/pop)]. Where Z=Z value (e.g. 1.96 for 95% confidence level); p=percentage of particular response on variable (e.g. have a LP; .5 used as most conservative estimate), expressed as a decimal; c = confidence interval, expressed as a decimal (e.g.; .05 = +/-5).

The table below shows a breakdown of audits completed across state/ territory and by venue type.

Table 3.1: Sample details

	Type	Venues*	Audits
ACT	Casinos	1	1
	Hotels	12	8
	Clubs	63	15
	Total	*76*	*24*
New South Wales	Casinos	1	1
	Hotels	1710	50
	Clubs	1322	50
	Total	*3033*	*101*
Northern Territory	Casinos	2	2
	Hotels	39	15
	Clubs	33	15
	Total	*74*	*32*
Queensland	Casinos	4	4
	Hotels	766	40
	Clubs	557	40
	Total	*1327*	*84*
South Australia	Casinos	1	1
	Hotels	497	30
	Clubs	69	16
	Total	*567*	*47*
Tasmania	Casinos	2	2
	Hotels	90	20
	Clubs	10	5
	Total	*102*	*27*
Victoria	Casinos	1	1
	Hotels	249	25
	Clubs	266	25
	Total	*516*	*51*
Western Australia	Casinos	1	1
	Hotels	0	0
	Clubs	0	0
	Total	*1*	*1*
Total Australia	Casinos	13	13
	Hotels	3363	188
	Clubs	2320	166
	GRAND TOTAL	5696	367

** Source: Productivity Commission 2010, Gambling, Report no. 50, Canberra. Ch.2. A snapshot of the gambling industry.*

A list of EGM venues was obtained from GRA/DoJ contacts and/or government websites in each of the states or territory. Of the 367 venues audited, 18 were found not to have EGMs at the time the audit was conducted.

3.2.2 Audit process

The audits of EGM venues were undertaken during the last two weeks of February 2014. Each venue audit was completed in two stages. The first stage involved researching the venue online to see whether it has a website and, if so, whether the website indicates that the venue has EGMs and/or a loyalty program. Any details about a loyalty program contained on the venue's website were recorded. Auditors also made note of how prominent EGMs or loyalty programs were on the venue's website and how easy it was to locate or navigate to.

The second stage involved a phone call to each of the venues in the sample, where the auditor posed as a potential customer (an approach to gathering data often referred to as "mystery shopping"). This approach was chosen because it was deemed unlikely that EGM venue operators would provide the necessary, accurate and complete information needed to answer the key questions for this part of the study if directly surveyed. Phone calls were made to all selected venues, regardless of whether or not the venue had a website or whether their loyalty program was advertised on their website.

The main purpose of the mystery shopping phone call was to provide confirmation of the existence of any loyalty programs and, once confirmed, to collect further details about the program. Details were sought regarding how the program works, key features and rewards, and how one would go about joining the program. Communications about the program were also investigated by asking whether the venue sends out newsletters or emails, and asking the venue to send out additional information by email.

All of the audit information was collected using an audit questionnaire. This instrument was developed in consultation with GRA / DoJ. A copy of this tool can be found in the Appendix. In order to gather a complete picture of EGM loyalty programs, the audit data was supplemented by information from loyalty program members via the discussion boards and longitudinal survey.

3.2.3 Data weighting

To correct for biases in the sample due to the stratified sampling approach, the data were weighted by venue type within each state to reflect the actual population of EGM venues in Australia (refer to the table below). For example, hotels in the ACT were under-represented in the audit sample obtained for ACT. In the sample they constituted 62.5% of ACT venues whereas they actually represent 82.9% of ACT venues. Hence these venue audits have been re-weighted, or adjusted up, to reflect their true value in the ACT population. Conversely, clubs in the ACT were over-represented in the audit sample obtained for the ACT and were thus given a lower weight.

Table 3.2: Weighted and Unweighted Sample

	Type	Unweighted %	Weighted %	Difference
ACT	Casinos	4.2	1.3	-2.9
	Hotels	62.5	82.9	20.4
	Clubs	33.3	15.8	-17.5
	Total	*100.0*	*100.0*	-
New South Wales	Casinos	1.0	0.0	-1.0
	Hotels	49.5	43.6	-5.9
	Clubs	49.5	56.4	6.9
	Total	*100.0*	*100.0*	-
Northern Territory	Casinos	6.2	2.7	-3.5
	Hotels	46.9	44.6	-2.3
	Clubs	46.9	52.7	5.8
	Total	*100.0*	*100.0*	-
Queensland	Casinos	4.8	0.3	-4.5
	Hotels	47.6	42.0	-5.6
	Clubs	47.6	57.7	10.1
	Total	*100.0*	*100.0*	-
South Australia	Casinos	2.1	0.2	-1.9
	Hotels	34.0	12.2	-21.8
	Clubs	63.8	87.7	23.9
	Total	*100.0*	*100.0*	-
Tasmania	Casinos	7.4	2.0	-5.4
	Hotels	18.5	9.8	-8.7
	Clubs	74.1	88.2	14.1
	Total	100.0	100.0	-
Victoria	Casinos	2.0	0.2	-1.8
	Hotels	49.0	51.6	2.6
	Clubs	49.0	48.3	-0.7
	Total	*100.0*	*100.0*	-
Western Australia	Casinos	100.0	100.0	-
	Hotels	-	-	-
	Clubs	-	-	-
	Total	*100.0*	*100.0*	-
Total - Australia	Casinos	3.5	0.2	-3.3
	Hotels	45.2	40.7	-4.5
	Clubs	51.2	59.0	7.8
	GRAND TOTAL	100.0	100.0	-

All data presented are weighted data unless otherwise specified. This means that the results can be interpreted as applying to all EGM venues within each state/territory, as well as Australia-wide. A copy of the detailed tables detailing all the data collected can be found in the Appendix.

The next section of the report discusses findings from the audit. Because EGMs in WA exist only at the one casino, results for WA are not included in the charts but are discussed in the text accompanying the relevant chart. Where the state or territory regulations around loyalty programs impact on the findings, this is mentioned. Please note that these regulations were current as at the date of the audit (February 2014). A full listing of all regulations relevant to loyalty programs is included in the Appendix. This legislation has been updated as at November 2015 as per feedback from peer reviewers.

The data were analysed by type of venue (i.e. casino; club; hotel) as well as by size (i.e. number of EGMs). Although both results are presented, it should be noted that there is a significant overlap between the two variables – casinos have a large number of EGMs and clubs and hotels generally have considerably smaller numbers of EGMs. Size was divided into four categories: Very Small, with 10 or fewer EGMs; Small, with 11 to 20 EGMs; Medium, with 21 to 40; and Large, with more than 40 EGMs at the venue.

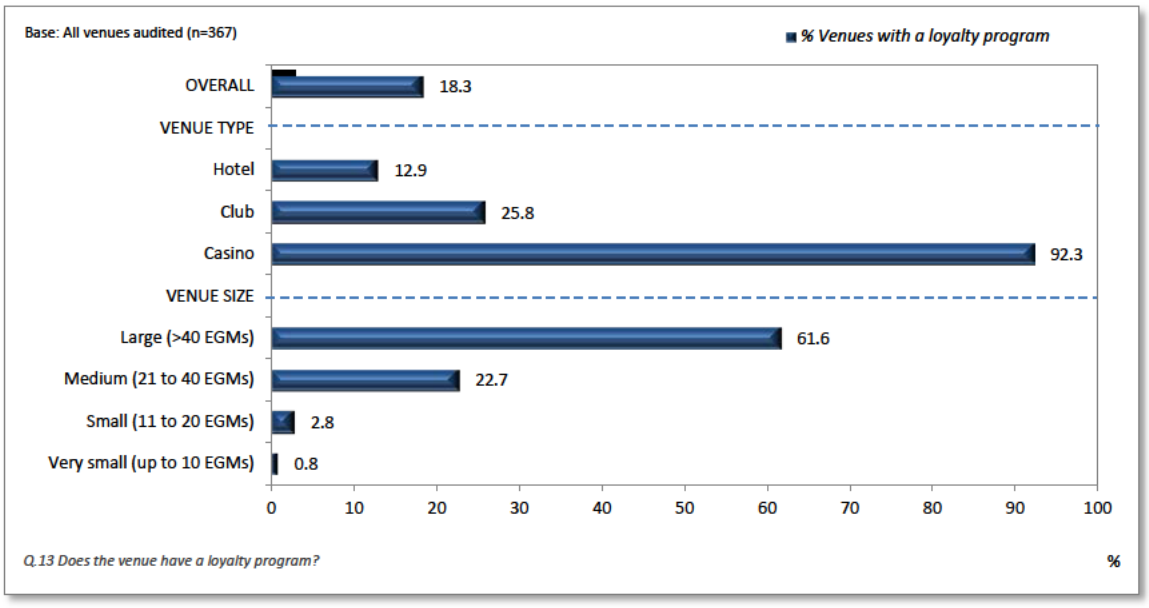
3.3 Prevalence and content of loyalty programs

3.3.1 Prevalence of loyalty programs

Of the 367 venues audited, 99 venues (or around 1 in 4) were confirmed to have a loyalty program. After weighting the data, this means that approximately 18% of all EGM venues in Australia have loyalty programs (see below figure).

The incidence of loyalty programs is much greater amongst casinos and venues with a high number of EGMs, and less common amongst clubs and hotels and venues with a smaller number of EGMs. All but one of the casinos (92%) appears to have a loyalty program, while around 1 in 4 clubs and 1 in 10 hotels appear to offer a loyalty program for their customers.

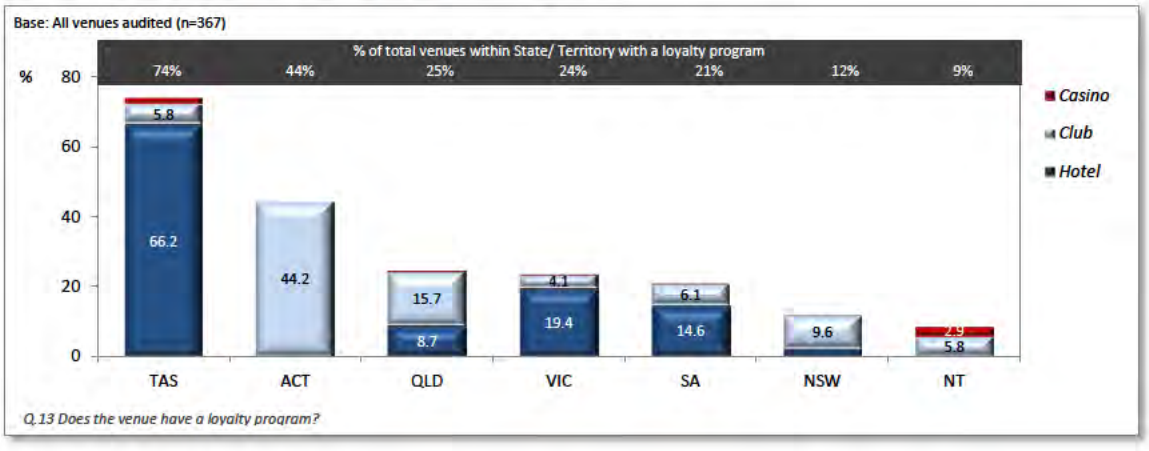
Figure 3.1: Prevalence of Loyalty Programs



The incidence of loyalty programs is much greater across Tasmanian venues than in any other state or territory[11]. The audit data show that approximately 74% of EGM venues in Tasmania have loyalty programs, with the majority of these being hotels (see below figure). The ACT has the second highest prevalence of loyalty programs among its EGM venues (44%); all of these venues are clubs.

Around 1 in 10 of the EGM venues in New South Wales and the Northern Territory has loyalty programs. The Perth Crown casino, the only venue in WA that offers EGM gambling, has a loyalty program.

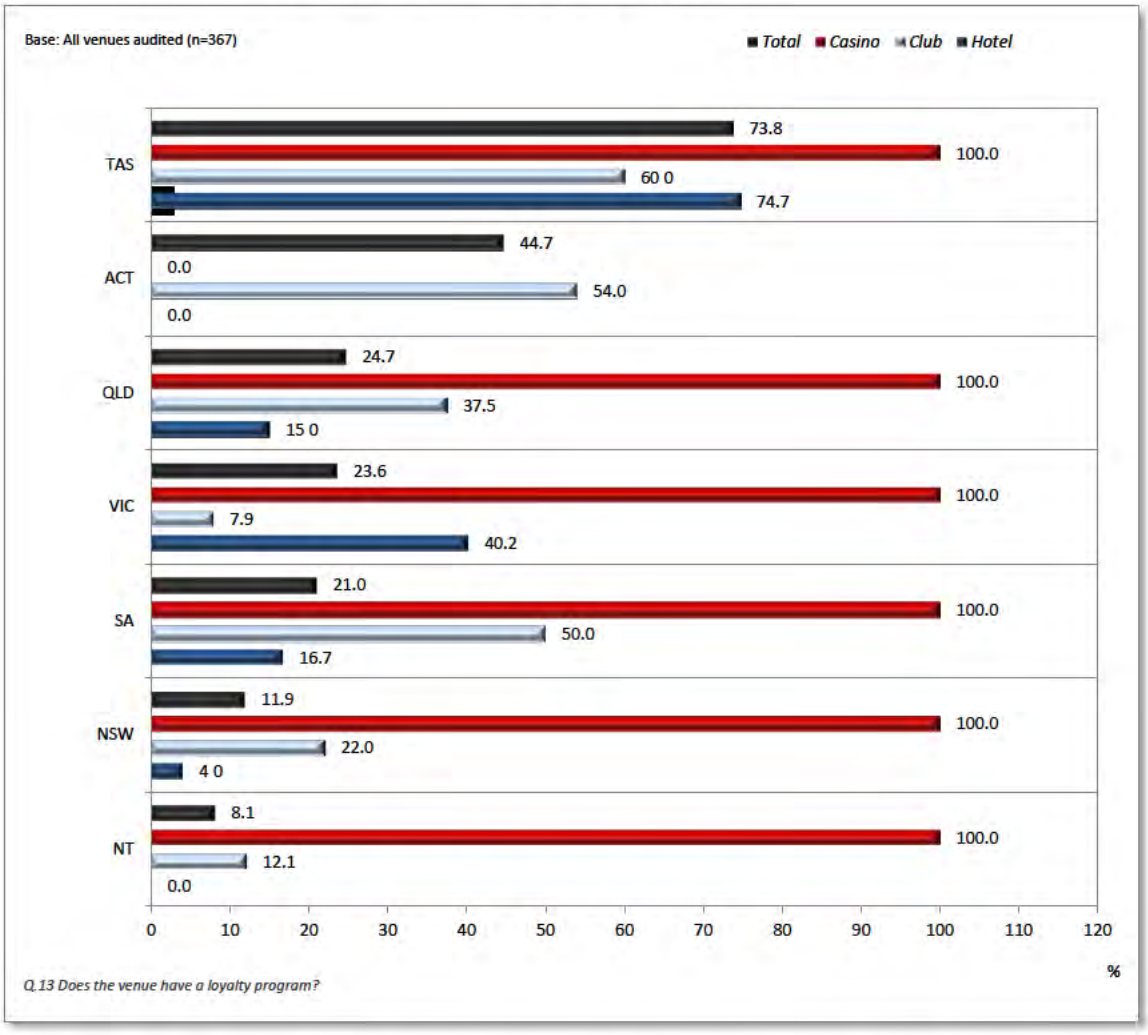
Figure 3.2: Prevalence of Loyalty Programs – by State



[11] Note that there is only one gambling operator in Tasmania.

The following chart (see below figure) shows the incidence of loyalty programs by venue type within each state. All casinos across all states and territories, including Western Australia (not shown) but with the exception of the ACT were found to have a loyalty program. In Tasmania, 75% of hotels and 60% of clubs have a loyalty program. In Victoria, loyalty programs are much more common amongst hotels, with 40% of hotels in this state having a loyalty program. In contrast, in Queensland, South Australia and New South Wales, loyalty programs are more common amongst clubs.

Figure 3.3: Prevalence of Loyalty Programs – by Venue Type by State

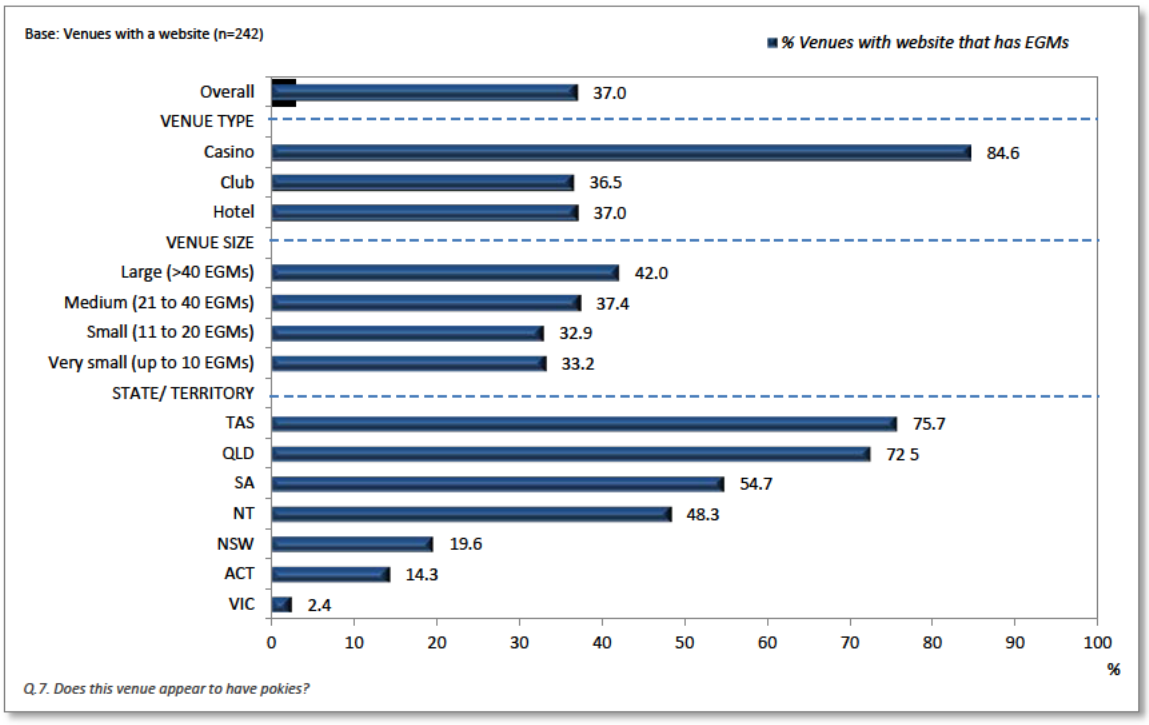


3.3.2 Prevalence of EGMs and loyalty programs on venue websites

Of the 367 venues audited, 242 venues (or around 2 in 3) were found to have a website. This translates to 59% of all EGM venues in Australia. As expected, larger venues are more likely to have a website. All (100%) casinos, 70% of clubs and 51% of hotels have a website.

Of the EGM venues that have a website, gambling machines are specifically advertised with images and/or text on 37% of these websites. Gambling machines are particularly prominent on websites of casinos, and venues located in Tasmania or Queensland (see below figure).

Figure 3.4: Prevalence of EGMs on Venue Websites



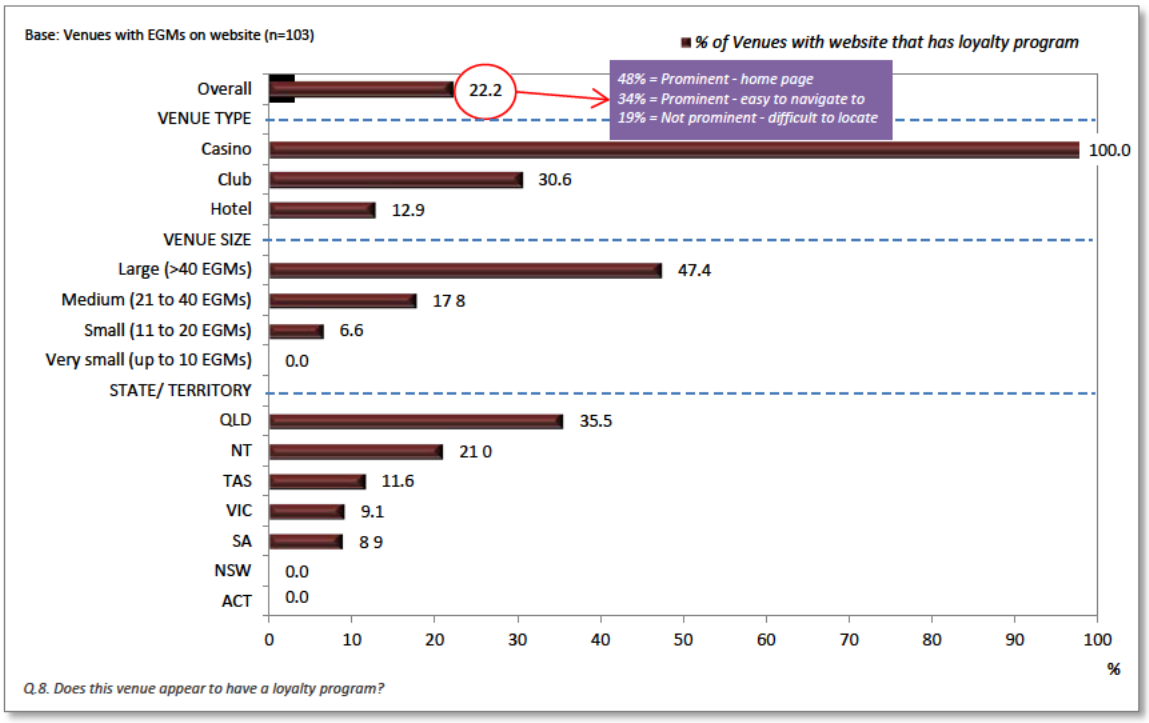
Only 2% of Victorian EGM venues with a website advertise gambling machines on their website. This percentage is also low for venues in the ACT and New South Wales (14% and 20% respectively). The Crown Casino in Perth was found to advertise gambling machines on their website. Regulations in Victoria and New South Wales prohibit gambling machine advertising outside of venues (the exception being to members of a loyalty program or scheme who have opted-in to receiving direct marketing materials, and then there are still further conditions).[12] Further analysis also revealed that venues with a larger number of EGMs were slightly more likely to advertise EGMs on their websites (42% of venues with 40 or more EGMs vs. 33% for venues with up to 10 EGMs).

[12] For further details on relevant gambling legislation, refer to the Appendix.

Of venues with a website advertising EGMs on their website, around 1 in 5 (22%) appears to have a loyalty program, although it was not always clear if the program was specifically related to EGMs and/or gambling at the venue. Venues with a loyalty program advertised on their website are more likely to be casinos or clubs OR venues with a large number of EGMs (i.e. 40+), or venues located in Queensland or the Northern Territory. Whereas Queensland has several guidelines around gambling advertising, it has few regulations. The website for Perth Crown Casino also includes information about their loyalty program (see below figure). Interestingly, the prevalence of loyalty programs on websites amongst Tasmanian venues is only around 1 in 10, despite the fact that Tasmanian venues were found to have the highest prevalence of loyalty programs once contacted by a mystery shopper. No venues in New South Wales or the ACT have loyalty programs listed on their website.

For the most part, loyalty programs are featured quite prominently on venue websites that advertise EGMs. The exception is Tasmanian venues, which has high rates of EGM advertising but low rates of loyalty membership information. Loyalty program information is usually featured on the home page (48% of the 22% of venues that have a loyalty program advertised on their website), or accessible from the homepage and easy to navigate to (34% of the 22%).

Figure 3.5: Prevalence of Loyalty Programs on Venue Websites



3.3.3 Prevalence of responsible gambling messages in conjunction with loyalty programs advertised on venue websites

Venues with a loyalty program advertised or mentioned in some way on their website were reviewed in closer detail to ascertain whether these advertisements were accompanied by responsible gambling messages (RGMs). Of the 31 venues with a loyalty program advertised/ mentioned on their website, all but 6 contained some sort of RGM. While most venues (24) provided a separate page or link to their loyalty (membership) program, in most cases the RGM was not located there. Instead, most venues provided a separate page or link on “gaming” or “gaming machines”, and it was here where the RGM were evident. Notably, all casino websites provided a dedicated page or link to responsible gambling, usually evident and accessible from the homepage. These pages typically contained very detailed RGM information such as how to identify if you have a gambling problem, places to contact for help, RGM codes of practice, and information on self-exclusion programs.

In terms of the types of RGM, specific phrases or tags were mainly evident on websites of EGM venues with a loyalty program in South Australia, Tasmania and Victoria. Often these key phrases were accompanied by phone numbers where gamblers can obtain help. In the case of South Australia and Tasmania, venues are required to provide this information on gambling related advertising. Some examples of key RGM phrases are as follows:

“KNOW WHEN TO STOP. DON'T GO OVER THE TOP. GAMBLE RESPONSIBLY." (SA Casino)

“Don't Let the Game Play You. Stay in Control. Gamble Responsibly.” (SA Club)

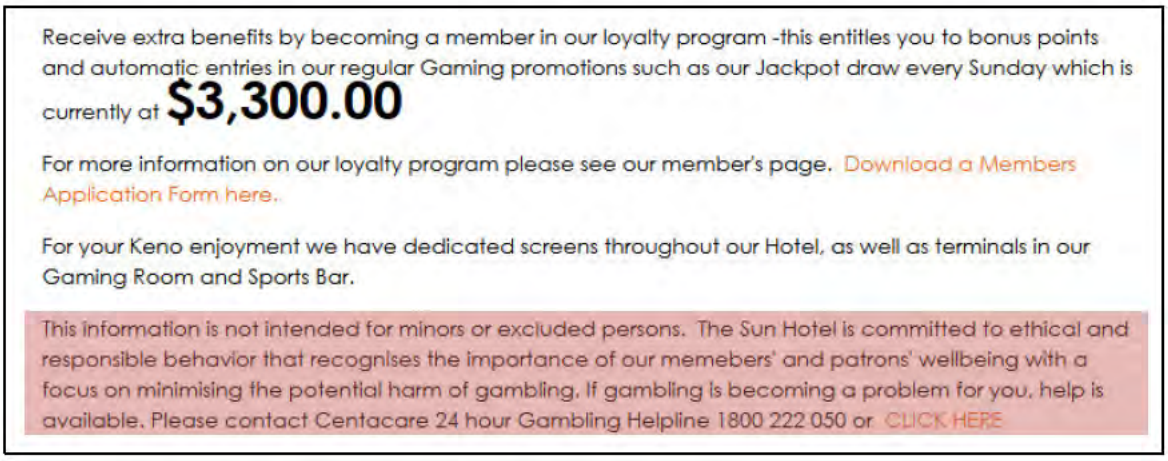
“Responsible Gaming Stay in Control.” (VIC casino)

“Have fun and play responsibly, Gaming Helpline Tasmania, 1800 858 858.” (TAS Club)

“BET WITH YOUR HEAD, NOT OVER IT.” (QLD Casino)

Most venues in Queensland also listed key telephone contacts alongside their RGMs, although there does not appear to be a mandate to do so. (Queensland has a Responsible Code of Practice that states that all gambling advertising must contain RGMs, but this does not stipulate the inclusion of specific RGM contacts). Queensland venues also tend to include statements that convey their commitment to responsible gambling practices. The following provides some further examples (relevant messages highlighted in red boxes):

The Sun Hotel, QLD
http://www.thesunhotel.com.au/articles/GAMING/21


Receive extra benefits by becoming a member in our loyalty program -this entitles you to bonus points and automatic entries in our regular Gaming promotions such as our Jackpot draw every Sunday which is currently at **$3,300.00**

For more information on our loyalty program please see our member's page. Download a Members Application Form here.

For your Keno enjoyment we have dedicated screens throughout our Hotel, as well as terminals in our Gaming Room and Sports Bar.

This information is not intended for minors or excluded persons. The Sun Hotel is committed to ethical and responsible behavior that recognises the importance of our memebers' and patrons' wellbeing with a focus on minimising the potential harm of gambling. If gambling is becoming a problem for you, help is available. Please contact Centacare 24 hour Gambling Helpline 1800 222 050 or CLICK HERE

Caboolture RSL, QLD
http://www.caboolturersl.com.au/gaming/


RESPONSIBLE GAMING

Caboolture RSL is committed to ethical and responsible behaviour that recognises the importance of our members and patrons wellbeing with a focus on minimising the potential harm of gambling.
Information on this page is not intended for patrons who are self excluded.

Please see our friendly staff if you would like more information on the services we can offer

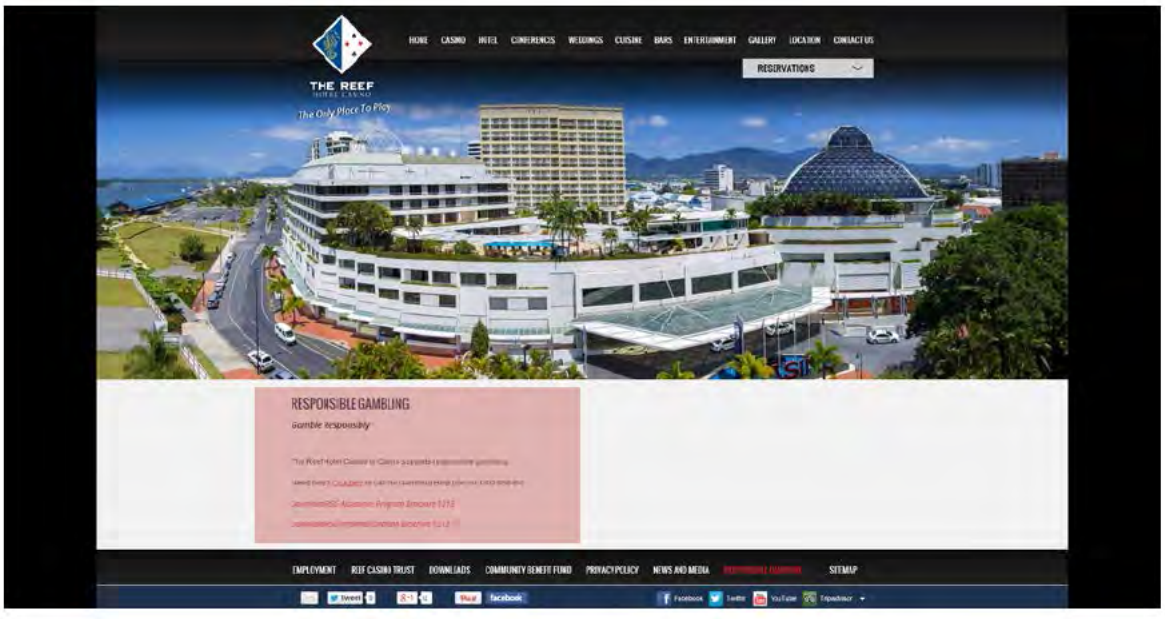
tab sportsbet TAB KENO

Club Glenvale, QLD

http://www.clubglenvale.com.au/gaming_at_club_glenvale.php

The Reef Hotel Casino, QLD

http://www.reefcasino.com.au/responsiblegaming-en.html



3.3.4 Loyalty program details

Following the audit telephone call, auditors recorded any information they had obtained about specific loyalty program details in open ended answer fields (comments).

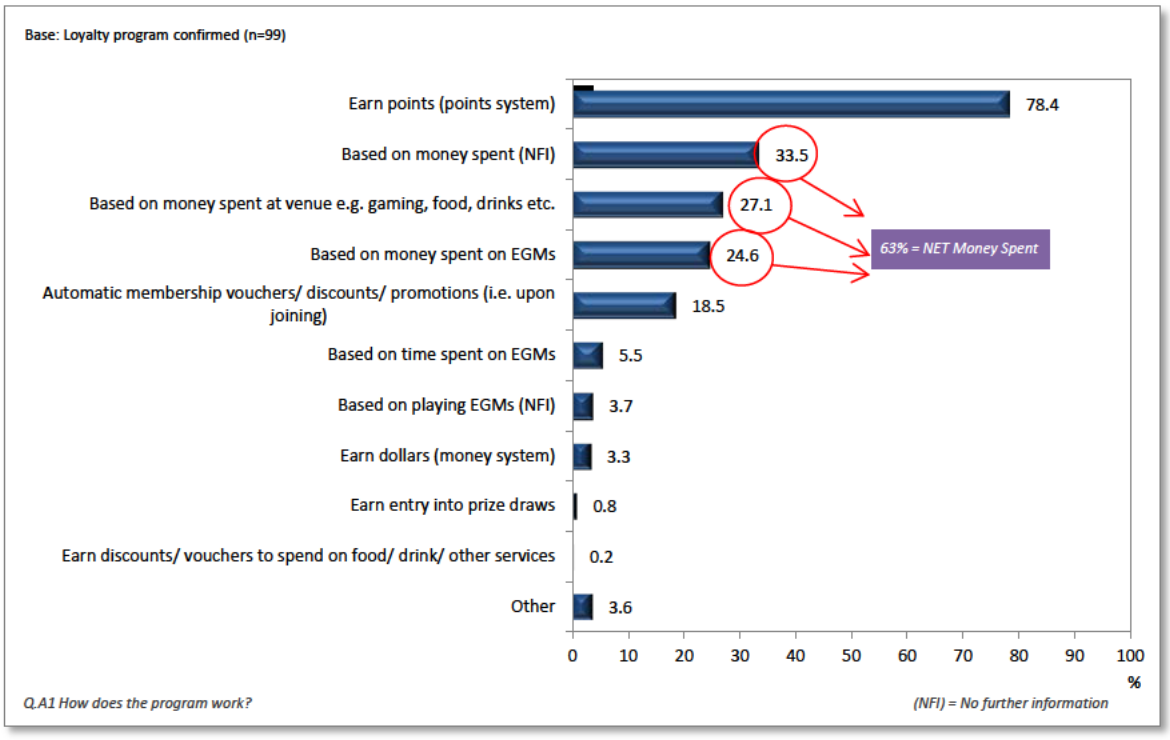
During the data analysis phase, these comments underwent a coding process based on Grounded Theory, an inductive approach in which codes, concepts, and categories are developed based on the data (Charmaz, 2003). This process involved first reviewing all comments to a question and identifying a set of key themes or codes. The coding of open-ended questions allows qualitative data to be quantified. Next the comments were coded by assigning each comment to a theme or code. In some instances a comment related to one theme or code and in others to multiple themes or codes. As a result, percentages shown in charts or tables may add to more than 100% because the original comment related to multiple themes. The acronym, “NFI”, following some themes stands for “no further information”. This means that not enough information was obtained from the venue respondent to place the comment into a more specific category.

Program Features

Information about loyalty programs provided on venue websites suggests that loyalty programs are often linked to both gambling and non-gambling activities at the venue and in both instances relate to the amount spent on these activities. These initial findings were confirmed by the telephone mystery shopping phase. During this phase, auditors recorded any details they obtained about how each loyalty program works. These comments were analysed and coded into key themes as shown in the figure below.

The majority of venues (78%) operate their loyalty program using a points system. This is the case for all casinos with a loyalty program (100%), and most clubs (91%). It is also more likely to be the case among venues with a medium (20-40) or large (41+) number of EGMs. In over 90% of cases, points are accumulated based on money spent.

Figure 3.6: Types of Loyalty Programs



For some venues it is difficult to know whether the loyalty program is specifically related to money spent on playing EGMs, money spent on other venue activities, or both. This uncertainty was usually because the venue respondent did not, or was not, able to specify. Hence three separate themes or codes were created to cover comments that related in some way to money spent (circled in red on above figure).

When analysing these comments as a single theme, it was found that 63% of all loyalty programs use a points system that is in some way based on money spent.[13] Loyalty programs based on money expenditure are evident across all casinos (100%) and most clubs (80%). Few programs appear to be based on either the amount of time spent on the EGMs or number of visits to the venue. Automatic membership rewards were evident for around 1 in 5 venues with a loyalty program, and this appeared to be mainly hotels and venues with a small number of EGMs (11-20). Membership for most loyalty programs is free, although some charge a small one-off or annual fee. This fee can be anywhere from $1, up to $20.

Looking at the results by state/ territory, it was found that Tasmanian and Victorian loyalty programs are unlikely to have a points system (less than 10%). In these states, members are more often provided vouchers or discounts either upon joining, or periodically (e.g. quarterly, or upon member's birthday or Christmas). These mostly consist of vouchers for gambling[14].

Accumulation of Points

During the telephone mystery shopping, information was collected about how members build loyalty program points. The coded comments indicate that about two in five venues use a points system allowing customers to earn points through money spent on non-gambling activities such as food, drink or accommodation. Further analysis of this data indicated that this is likely to be *in addition to* earning points spent on EGMs or gambling. Examples of how some points systems work are shown below:

- Spend $1 at venue to earn $1 point
- Spend $2 playing EGMs to earn 1 point
- Spend $3 playing EGMs or at the bar to earn 1 point
- Spend $10 playing EGMs to earn 1 point
- Spend $20 playing EGMs to earn 1 point[15]

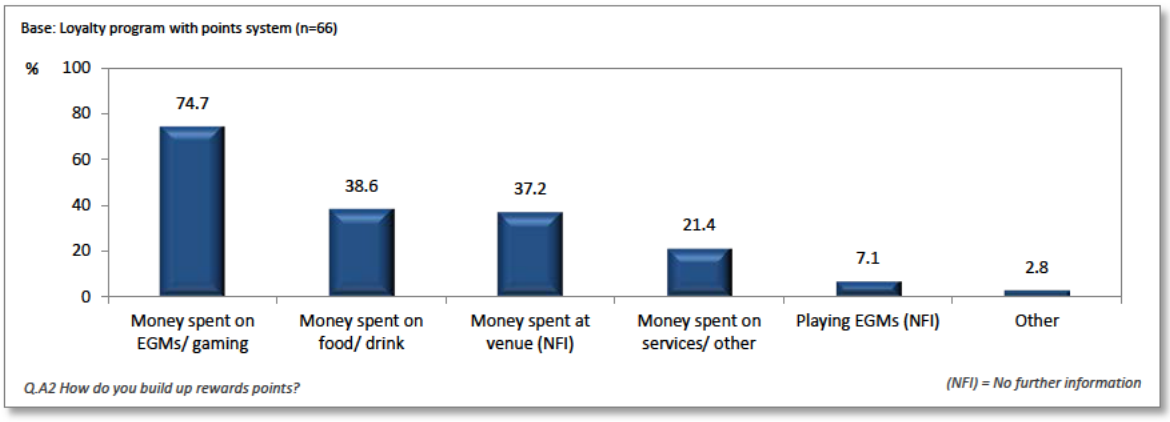
It is unclear, however, how many of these venues, if any, operate a loyalty program in which points are *exclusively* earned from money spent on EGMs or gambling.

[13] This percentage was calculated by deriving a NET score of all comments that related to one or more of the three themes concerning money spent. However, each comment was counted only once even if it related to more than one of these themes.

[14] Note changes to the regulations since the audit was conducted. See: Regulation 26 of the Gambling Regulation (Pre-Commitment and Loyalty Scheme) Regulations 2014, which commenced on 1 December 2015. Under these regulations, loyalty scheme providers in venues must not allow a person to participate in loyalty scheme that enables loyalty points to be redeemed for gaming machine credits, gaming tokens, anything that can be exchanged for gaming machine credits or gaming tokens or any other thing that can be used to play a gaming machine.

[15] "Spend" refers to the amount wagered on EGMs, including winning and non-winning bets.

Figure 3.7: How Rewards Are Earned



From the statements below by venue respondents in response to questions about how the loyalty program works, it appears that some of these venues may operate loyalty programs solely based on money spent playing EGMs.

> *"Every $2 you play earns you 1 point. Insert your membership card into the card reader of any gaming machine and the machine will calculate the number of points you accumulate during your play."*

> *"Swipe card - every $10 spent on a machine, one point is accrued. Points can be redeemed for cash or drinks and meals."*

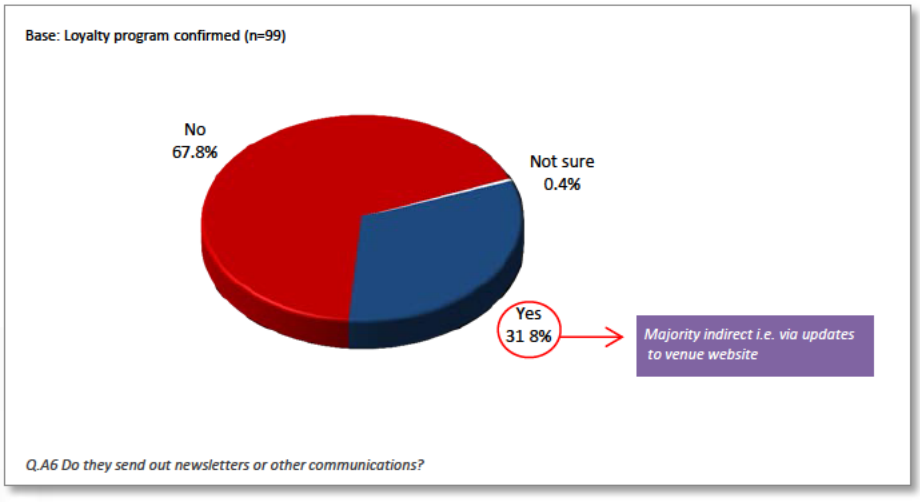
> *"Accumulates as you play at the poker machines if you have the card inserted. Double casino dollars earned between 5-7pm Monday to Thursday."*

Compared with venues in other states/territories, New South Wales venues with a loyalty program based on a points system are more likely to operate by earning points via money spent on EGMs or gambling (84%).

Communications

Around one in three venues with a loyalty program (32%) communicates with its members about the program beyond initial enrolment. This is particularly the case for venues in New South Wales and Queensland. However, such communication is generally done indirectly. Typically venues will simply update information on their website or provide latest news, rather than email or contact members directly with the information (see below figure). Consequently, venues most likely to communicate with their members about their loyalty program tend to be those with websites -- clubs, casinos, and/or venues with a larger number of EGMs (20+).Only 16% of venues were able to send out information by email when asked.

Figure 3.8: Communications Regarding Loyalty Programs



Overall, only 3% of venues with a loyalty program actually agreed to email the mystery shopper information when requested. Most of the emails received were simply confirmation emails and did not provide any further details or information regarding the loyalty program. These emails tended to come from venues within the same "chain". These venues appear to have added the shopper to an email subscription or newsletter mail out list and the email simply acknowledged this; or the venue added the customer to their membership list and the email asked the customer to confirm and/or activate their membership.

Activation of membership and logging in to the member's portal similarly did not yield any further information – just the opportunity for the member to create their "profile" and update their email preferences. The one newsletter sent related to events and promotions at the venue in general and did not detail anything specifically related to gambling. Of the three emails received that contained information, two attached brochures about the program, with one including a membership form. The other email simply listed some key features of the program and referred the customer to the venue's website for more information.

On the venue's website, there was no information about the program, just a promotions page where some gambling promotions were evident. Examples of these promotions include earning bonus points and entering a prize draw to win a car for every $30 won on the gambling machines.

Any brochures/ information received via email are included in the Appendix.

Branded Programs

Most loyalty programs are not branded and are simply referred to as "membership programs" or similar. However, a few of the programs were referred to by a brand name. Many are unique to the individual venue and as such are named after the venue followed by either the word, "club", or "rewards".

The following branded loyalty programs operate across a number of venues and are run either by the operator of the venue or by a third party provider:

- Federal Rewards Clubs – casinos in Tasmania
- Oasis Rewards Club – hotels and clubs in Tasmania
- Absolute Rewards – casinos in Queensland and New South Wales
- Maxⓔtag Rewards System – various venues and states/ territories
- Diamond Rewards – various venues in Victoria and Queensland

These loyalty programs were researched in greater depth to provide additional insight into how they are run and structured:

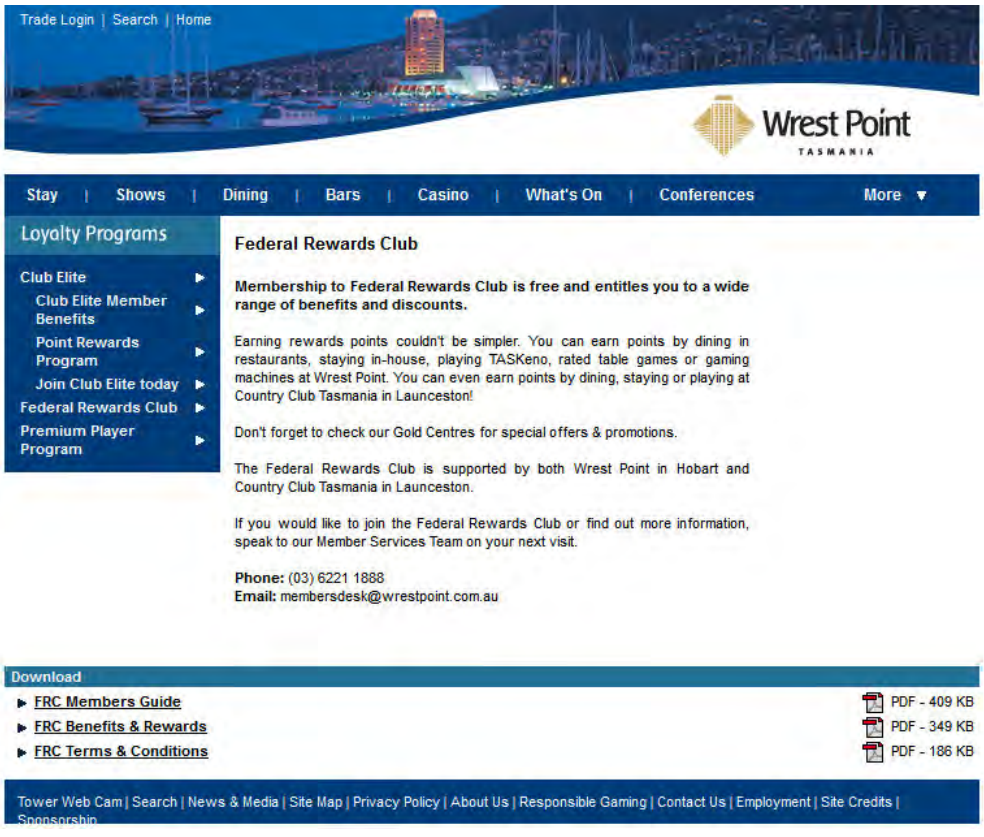
Federal Rewards Club and Oasis Rewards Club.
These programs are managed by the Federal Group (http://www.federalgroup.com.au), which operates a number of EGM venues across Tasmania. The Federal Rewards Club appears to be linked with the casinos, while the Oasis Rewards Club appears to be linked with hotels and clubs that contain Oasis poker machines[16]. These programs do not appear to have their own dedicated websites.

Little information is available online regarding the Oasis Rewards Club. Almost none of the clubs and hotels employing this loyalty program provide any information about the program on their websites except to name the program. What is clear from the audits is that this program does not operate on a points system. Rather, it appears to provide vouchers to incentivise playing the EGMs and visiting the venue (e.g. $1 gambling credit for every $20 spent playing EGMs; discounts offered on food and beverages; birthday vouchers; promotions).

[16] An industry source confirms that this is the case.

The casinos, however, provide detailed information about the Federal Rewards Club on their websites (see picture on following page), and there are brochures about the program available for download. These brochures were sent out upon request via email to one of the mystery shoppers. The “Rewards and Benefits” brochure indicates that the Federal Rewards Club program operates on a points system, with points earned through gambling and non-gambling (e.g. dining and accommodation) spend at the venue. Points can be redeemed for cash or vouchers to use at the venue (or an associated venue).

3.3.4.1.1 Example of website information (Loyalty Programs (Good Hotels in Hobart))



Examples of rewards include a $150 dining voucher to use at one of the venue restaurants, gift cards of various values to use at the venue, and accommodation packages.[17]

The “Member’s Guide” Brochure, which presents an overview of the Terms & Conditions of this program[18], indicates the following key rules:

- *The number of points earned is based on a combination of the amount you play and the game being played (on gaming machines, Rapid Roulette, TASkeno, and selected Tables Game, excluding poker).*

[17] Refer to the Federal Rewards Benefits & Rewards Brochure attached in Appendix.
[18] For a full list of T&C’s refer to http://www.wrestpoint.com.au/content/2568/21227_CC_FRC_Terms_DL.pdf

- *A maximum of $10 cash can be redeemed for points per member per transaction.*
- *Loyalty points cannot be redeemed for alcohol inside the gaming area or other food outlets at the venue* ***unless redeemed with food****.*

This last rule appears to possibly violate Tasmania's Responsible Gambling Mandatory Code of Practice, which states that people must not be offered free alcohol, or discounts or vouchers for the purchase of alcohol, for consumption on the premises as an inducement or reward for gambling unless outside of the gambling area or in private gambling areas. However, the Tasmanian government interprets this rule as requiring that loyalty points cannot be redeemed for alcohol inside the gaming area or other food outlets at the venue unless redeemed with food, and interprets the above stated Terms and Conditions as adhering to this rule.

The Federal Reward Program brochures clearly display the responsible gambling message and Gamblers Help Hotline number at the bottom of the brochures. However, no such messages are evident on the website.

Absolute Rewards

This program is managed by the Echo Group, which operates the three casinos in Queensland and the one casino in New South Wales. The program has a dedicated website that details how the program works, the benefits or rewards that can be obtained, and provides both new and existing members a portal where they can join and keep track of their membership (Absolute Rewards). This program also operates on a points system. Points can be earned by playing "compatible" table games, and also via money spent on food, beverages and accommodation. However, there is no specific information as to exactly how these points are earned or how they translate in dollar terms.

Example of information about the Absolute Rewards program on a venue website (Member Benefits - The Star):

There are four tiers of membership depending on the number of points earned, although it is unclear how many points are required to qualify for each tier. Higher tiers have access to additional benefits such as free parking, access to a private gambling room, and complimentary hotel stays. Points earn discounts or vouchers to use across venue services (for food, beverages, accommodation, or parking), as well as Casino Dollars that can be spent on gambling, food or other services across the venues.

The Terms & Conditions page on the website (Absolute Rewards | Terms and Conditions) indicates that membership is free and photo ID is required to join. Points have an expiry date after 90 days of inactivity, and a membership may be cancelled after 12 months of inactivity. The website also displays a responsible gambling message and the Gamblers Help Hotline number at the bottom of the website as per New South Wales responsible gambling guidelines. It is unclear from the information provided whether points can be redeemed for alcohol or gambling credit, which would violate regulations.

Maxⓔtag Rewards System

This system is operated by a third party provider, Global Gaming Industries, which is a manufacturer and distributor of EGM machines and gaming software. As part of their services, they also offer a "monitoring system" to track customer's purchases including gambling participation, which can also reward and incentivise customers for their purchases. Members are provided with a Maxⓔtag or card which they use to "touch on" to the Player Interface Module on the EGM. This logs them into the system and offers rewards while they play. Rewards can include prizes (usually cash), although they can also include free meals or drinks – whatever the venue wishes to nominate. Venue operators can be involved in managing the system through member kiosks and uploading their own vouchers or cross promotions to the system. Additionally, competition barrels can be connected to the system to reward players. Each time a customer plays, tickets will automatically print and drop into the barrel ready for the prize draw.

It was unclear from the audit whether this was a system based on earning points. But the website confirms members do in fact earn points. The Terms & Conditions brochure available on the website indicates points are earned when purchasing goods or services at the venue. In addition, credit may be added to the card so that members can participate in gambling related trade promotions or prize draws that are solely based on playing the gambling machines. Venue operators can also issue additional points or bonus points. How members go about redeeming points is unclear, suggesting this process may be at the venue operator's discretion and specific to each venue.

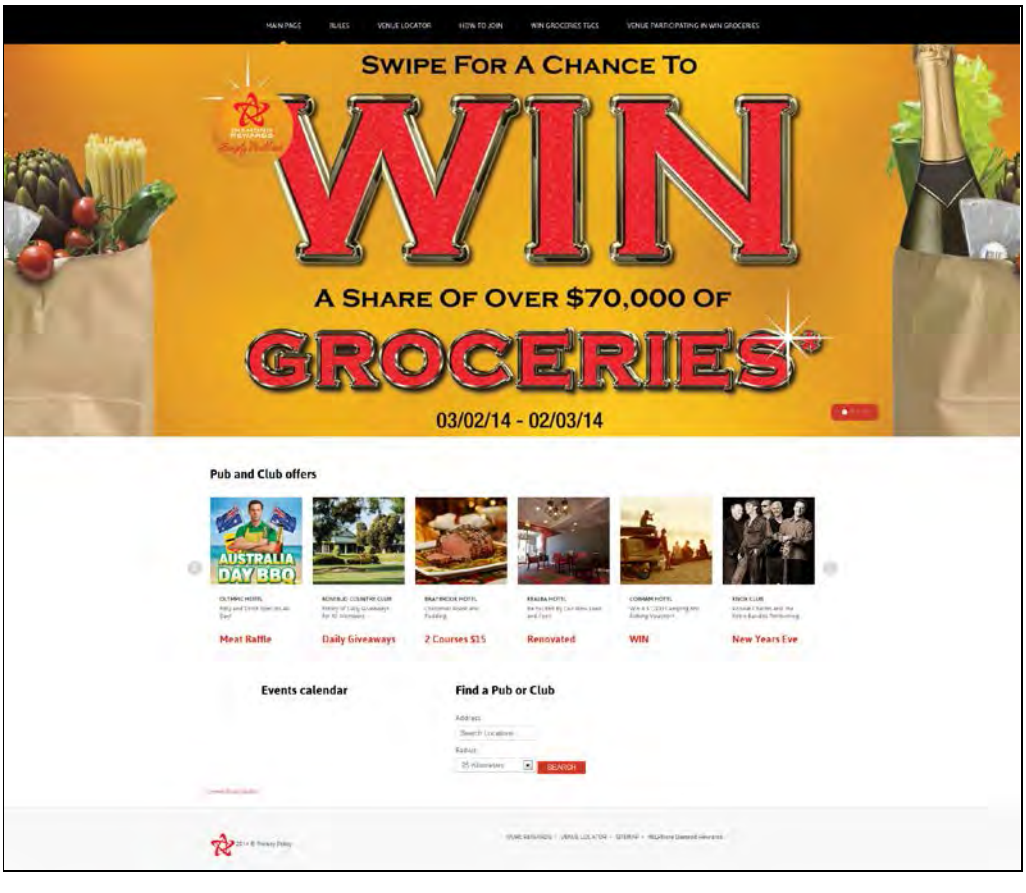
Screenshot from Maxⓔtag website (Maxⓔtag):

Membership to the program is free to persons 18 years old and over. Points and membership may expire after 12 months of inactivity. The Maxⓔtag system also includes a free pre-commitment system. This system provides players with a reminder (via the machine, SMS, email or mail) when they are about to exceed their nominated budget. Players can also generate a printed analysis of their gambling session that details a) how much they set to spend; b) how much they have actually spent; and c) the credit or debit difference. Activity statements may also be sent out every few months by the venue operator depending on the member's frequency of playing, or at the member's own request.

Diamond Rewards

Diamond Rewards is a loyalty program employed by several Victorian and Queensland venues. This program is largely run by the venue operators themselves, but is overseen by TabCorp under their TabCorp Gaming Solutions (TGS) banner. According to the TGS website, this program will be available to New South Wales venues shortly following approval of their licence and gambling agreement by the state authorities (TabCorp gaming).

Diamond Rewards has its own dedicated website where the “rules”, or Terms and Conditions of the program, are clearly listed (Diamond Rewards). Responsible gambling messages are notably absent from this website. Like many other loyalty programs, this program operates via a points system, with five membership tiers. Kiosks are located within venues and members are required to “swipe on” upon entering the premises to earn points. Additionally, members are required to present their card to venue staff when making purchases. Points are earned and redeemed exclusively in that venue and are not transferable. The specifics of the program appear to be up to the venue operator’s discretion. These specifics include number of points needed to be earned within a 12 month period in order to qualify for a membership tier, as well as how points are earned in relation to dollar amount spent.



Points are earned for spending on food, beverage and other venue activities. A few venues specifically state that points are earned based on participation in gambling activities (see picture below). These venues were located in Queensland and clearly named the Diamond Rewards program alongside a description of the tier structure and member kiosks (Cabsports; Dicky Beach Surf Club).

From time to time the venue operator may also introduce additional means of earning points including vouchers and special offers, or invite members to participate in special promotions at the venue. It also appears TabCorp may run prize draws or promotions such as the one shown in the screenshot. Some examples of rewards provided by the venues include:

- 500 bonus points upon sign up
- Discounts on food and beverage items
- Daily specials / vouchers to be won
- Birthday rewards (e.g. vouchers, prize draw, bonus points)
- Entry into competitions
- Prizes and merchandise on display (gifts showcase)

Enrolment occurs at the venue. Venue operators provide prospective members with a membership form and copy of the rules of the program and issue a card on site. Members must be 18 years or older to qualify and may need to present identification. Unused points expire after 12 months from the date they were earned (except for the top tier of membership in which points never expire).

3.4 Discussion

Using a methodology of desktop research (examining web sites) plus mystery shopping (ringing venues as a potential LPM), the audit was designed to answer the following key questions:

1. What percentage of EGM venues in Australia have loyalty programs? Do percentages differ by state/territory and by type of venue (casino; club; hotel)?
2. How do the loyalty programs work? How do you build up rewards points?
3. What sorts of rewards can you get?
4. Are the programs linked to non-gambling activities?
5. How do you enrol? Is membership free or is a fee charged?
6. How are the loyalty programs marketed (e.g. Are they on their website? Can you enrol online or over the telephone or do you need to visit the venue? Do they send out newsletters or other communications about the program?)
7. How do loyalty programs differ by state/territory and by type of venue (casino; club; hotel)?

We found that loyalty programs are not commonplace among EGM venues in Australia. Fewer than 1 in 5 venues with EGMs were found to have a loyalty program, with prevalence highest among venues in Tasmania. Casinos and venues with a high number of EGMs were also much more likely to have loyalty programs.

Loyalty programs are generally not well advertised on venue websites, especially those of clubs and hotels (i.e. smaller venues with fewer EGMs). They are certainly less advertised compared to EGMs. Loyalty programs tend to be marketed in-venue, where members are usually able to join and can obtain/receive information relating to the program. Obtaining membership appears to be relatively easy - it is normally free or available for a small annual fee and can be done immediately with photo identification to demonstrate proof of age (18+ years).

Following initial enrolment, communications about loyalty programs outside of the venue appear to be limited. A short email may be sent to new members to acknowledge their enrolment or request a few further details to finalise their enrolment. However, venues are unlikely to send additional information or details about the program to members beyond enrolment. Some venues (mostly clubs and hotels) provide general updates or news on their website about new promotions relating to the program, which leaves it up to members to seek out this information. In contrast, casinos and larger venues are much more likely to provide detailed information about loyalty programs on their website and communicate with members outside of the venue. These findings suggest advertising and communications in regards to loyalty programs may be linked with the funds and resources venues have available to engage in these activities.

Most loyalty programs operate using a points system that involves points earned for dollars spent on gambling activities or other items at the venue such as food and drinks. This was evident across all casinos in Australia and most clubs, and is therefore

not location specific. Gambling activities may encompass EGMs as well as other gambling products, with different amounts of points earned depending on the type of activity. Notably, points were unlikely to be earned exclusively from gambling expenditure; it was more common for points to be derived via a number of channels, although the research findings were not conclusive in this regard.

Earned points tend to have an expiry date, which encourages users to earn and spend points on a more frequent basis. Bonus points can also be earned – this may be automatic in the case of a member's birthday, or via expenditure at certain times or on certain things. Points can be exchanged for a number of "rewards" which vary across programs and venues. The most common rewards include discounts, vouchers or credits which can be used in conjunction with other services or goods offered by the venue such as meals, drinks or accommodation. At some venues, points can be exchanged for cash. Clubs and hotels tend to offer other rewards such as entry into prize draws, free meals/drinks, or using points to select a "gift" from a showcase. Casinos often have a "tier system" in place, with higher tiers associated with a higher number of points earned within a specific timeframe and greater rewards offered in exchange.

4 Literature review

4.1 Objectives

The purpose of the literature review was to present the existing evidence regarding loyalty programs' efficacy and impact on gambling attitudes and behaviours. A preliminary review of the literature on loyalty programs conducted at the proposal stage indicated that there was little information on gambling loyalty programs either in Australia or overseas. This review therefore widens the net to include literature on loyalty programs in general, as well as in industries outside of gambling in which the findings may be applicable to the gambling industry. Findings from the literature review and audit were used to develop the online discussion board topic questions and survey instrument.

4.2 Methodology

4.2.1 Search strategy

The search strategy was designed to identify both published and grey literature that met the inclusion and exclusion criteria. Inclusion criteria consisted of:

- any academic article or publicly available report on a government or gambling research organisation website
- in English
- published within the past 10 years (2004-on[19]) about customer loyalty programs.

Exclusion criteria consisted of articles about loyalty programs in specific industries other than the gambling industry with findings and conclusions specific to that industry, or loyalty programs in general with assumptions or findings not relevant to the gambling industry. An example of the latter was an article using game theory to test a situation in which one of two competing firms offers a loyalty program and the other offers lower prices (Singh, Jain, & Krishnan, 2008).

[19] Two exceptions to this date restriction were one article published in 2002 and another in 2003 that were deemed significant enough to include in the review.

Published literature was searched using the following electronic databases:

- PsycInfo
- PubMed
- EBSCO Academic Alumni Edition
- EBSO Business Source Alumni Edition
- Google Scholar

Search terms consisted of: “loyalty programs” OR “rewards programs” OR “membership card(s)” WITH OR WITHOUT gamblers/gambling; electronic gambling machines/poker machines/pokies/slot machines/fruit machines; Australia. The grey literature was searched using Google Scholar, as well as by searching the government website in each state or territory responsible for gambling, and gambling research organisations.

The following websites were searched for relevant reports or other articles:

- ACT: http://www.gamblingandracing.act.gov.au/Research.htm
- New South Wales: http://www.olgr.nsw.gov.au/olgr_default.asp
- Northern Territory: http://www.dob.nt.gov.au/gambling-licensing/gambling/gambling-research/Pages/default.aspx
- Queensland: http://www.olgr.qld.gov.au/gaming/responsible/research/index.shtml
- South Australia: http://www.problemgambling.sa.gov.au/professionals/research
- Tasmania: http://www.dhhs.tas.gov.au/gambling/research2/tasmanian_research
- Victoria: http://www.responsiblegambling.vic.gov.au/what-we-do/research/published-research-reports (Accessed Feb 2014. No longer available as at Dec 2015.)
- Western Australia: https://www.rgl.wa.gov.au/Default.aspx?NodeId=117&DocId=458
- Gambling Research Australia: http://www.gamblingresearch.org.au/find/publications/

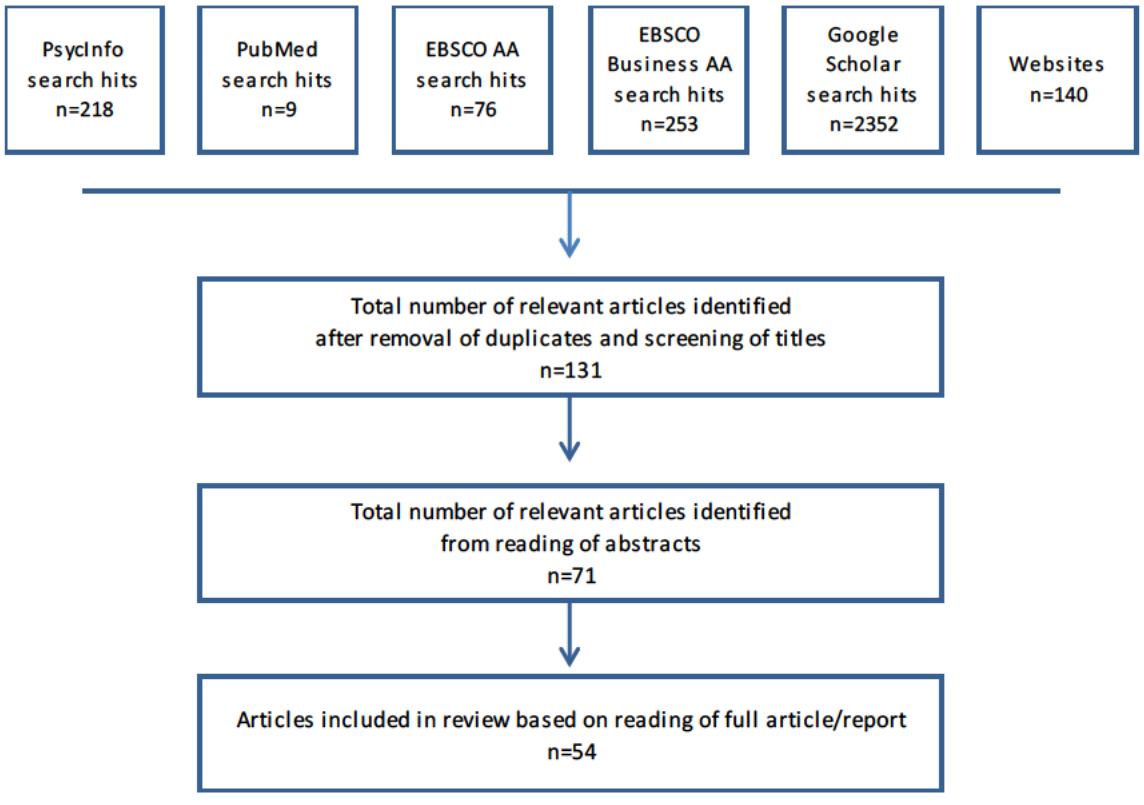
4.2.2 Choice of studies

A total of 2,908 citations were returned from the database searches; an additional 140 reports or other articles found on websites were identified for possible inclusion.

Two researchers independently reviewed first citation titles and then abstracts or executive summaries to select relevant articles and reports for inclusion in the review. After removing duplicates and irrelevant articles and reports based on title, 131 abstracts were read for relevance according to the inclusion and exclusion criteria. Any disagreements regarding inclusion or exclusion were discussed and resolved between the researchers. A total of 54 articles are included in the review. Eligible studies were not systematically assessed for methodological quality prior to inclusion in this review.

A diagram of the literature selection process is illustrated in the below figure.

Figure 4.1: Literature selection process



A breakdown of articles by theme and country are presented in the table below.

Table 4.1: Articles included

Article theme	Number of articles relating to theme
Australian loyalty programs	2
International loyalty programs	52
TOTAL	**54**
Loyalty programs – gambling industry	16
Loyalty programs - other industries	19
Loyalty programs – general	19
TOTAL	**54**
Country of origin/focus	**Number of articles relating to country**
US	22
Australia	2
Canada	2
UK	2
Germany	1
Holland	1
Italy	1
Korea	1
Macau (China)	1
Singapore	1
Spain	1
Taiwan	1
None specified/ various	18
TOTAL	**54**

4.3 Introduction

4.3.1 Gambling and EGMs in Australia

Australia has the highest per capita expenditure on gambling in the world. Approximately 70% of the adult population engages in some form of gambling each year. Gambling expenditure increased substantially in the 1990s, mostly due to the liberalisation of gambling laws, and has since then stabilised. Most gamblers engage in gambling for entertainment without harmful effects. A small percentage of gamblers, however, encounter difficulties. The Productivity Commission (2010) states that based on available data, approximately 0.5% to 1.0% of Australian adults suffer significant problems from their gambling, with an additional 1.4% to 2.1% at risk. These figures, however, exclude binge gambling, which may underestimate rates of problem gambling (Dowling, et al., 2008).

Gambling expenditure in Australia is dominated by Electronic Gaming Machines (EGMs), which comprise approximately 62% of all spending on gambling. Just over half of this expenditure takes place in clubs and hotels, with the remaining in casinos. This percentage, however, varies widely by jurisdiction, with expenditure from clubs and hotels representing approximately 73% in South Australia but 0% in Western Australia where EGMs are allowed only at the casino. Not only do EGMs comprise the majority of Australian gambling revenue, but also they are overrepresented among problem gamblers seeking treatment, with various characteristics of EGMs contributing to their addictive quality. Because of these factors, much of the research conducted on gambling and harm minimisation has focused on EGMs (Productivity Commission 2010).

4.3.2 Loyalty programs

Background

The first contemporary customer reward program, with the goal of increasing repeat purchase, was launched in 1981 with American Airlines' Advantage loyalty program (McCall & Voorhees, 2010). More than 30 years later, loyalty programs are a mainstay in the hospitality industries (Hoffman & Lowitt, 2008). Following the airline and hotel industries, gambling was one of the next industries to adopt loyalty programs and offered a range of incentives to reward customers' repeat purchases (Mills, 2007).

Loyalty programs are one of a number of marketing tactics designed to increase purchases and foster customers' loyalty (Kim, Vogt, & Knutson, 2011). Loyalty programs can be differentiated from "inducements", which are one-off benefits, such as free meals, gifts and account credits (Haycock, Lewis, McLeod, & Thomas, 2011:3) and therefore do not reward or encourage repeat purchase. The elements of a typical loyalty program involve members earning loyalty points, or the equivalent, for buying from the loyalty program provider. Accumulated points can then be exchanged for discounts, gifts, or membership in higher loyalty program tiers (Bijmolt, Dorotic, & Verhoef, 2011).

4.3.3 Australian EGM loyalty programs

We know from the audit of loyalty programs conducted for this project that approximately 18% of EGM venues in Australia offer loyalty programs to their patrons. These programs often involve the issuing of loyalty cards, which allow players to accumulate points from gambling that can be traded in for prizes, raffle tickets or coupons which can then be converted into credits for use on EGMs (Delfabbro, 2012). Loyalty program members may also receive exclusive emails and newsletters to keep them up-to-date with the latest offers and benefits, and the ability to check and redeem their points online. Most casino loyalty programs provide privileges such as affinity groups, frequent buyer or visitor programs and customer clubs, and allow members to gain special access to private events, cash-back programs, and exclusive entry to VIP gambling tables or even free parking. Most casinos return to members a certain percentage of their play money, to encourage the members to play and return (Ahn, Koo, & Lee, 2012).

4.3.4 Goals of loyalty programs and definition of "loyalty"

Studies vary regarding what they consider the goal of loyalty programs to be. Most loyalty program researchers agree that a goal of loyalty programs is to build both attitudinal and behavioural (purchase behaviour) loyalty (Ha, 2008; Mahoney & Palmer, 2005; Shi & Wei, 2012). Some researchers argue that loyal attitudes must underlie loyal behaviours in order for a loyalty program to be truly successful (Hendler & LaTour, 2009; Baynes, 2011; Huang, 2008; Mascarenhas, Kesavan, & Bernacchi, 2006). Arranz, Cillan and Gomez (2006) state that behavioural loyalty is "fragile" without there also being attitudinal loyalty. East, Gendall, Hammond and Lomax (2005), however, argue that attitudinal loyalty and behavioural loyalty are separate concepts and recommend against combining them into a single measure of loyalty.

Arranz et al. (2006), in a review of the literature, define behavioural loyalty as including frequency of visits, purchase volume, and percentage or share of purchase. They list key components of attitudinal loyalty as customer satisfaction, customer attitudes, trust, and commitment. Other researchers consider customer satisfaction separate from attitudinal loyalty (Mahoney & Palmer, 2005). A discussion of how customer satisfaction fits into loyalty program models is discussed later in this review.

There is some disagreement regarding whether attitudinal and behavioural loyalty are ultimately the end goals of loyalty programs, or whether instead they aim to fulfil other outcomes, such as increased company profit. For example, Lewin, et al. (2007), in a study of the credit card industry in Singapore, argue attitudinal loyalty is a mediating variable between perceived attractiveness of a loyalty program and perceived 'switching costs' and 'share of wallet' ('switching costs' refers to the time, money and effort associated with changing service providers, whereas 'share of wallet' refers to the consumer's brand-level spending within a product category). With loyalty programs, switching costs often involved forgoing points, the effort and time in signing up for a new program and learning how to redeem rewards, and psychological costs such as loss of a sense of belonging or status. Other specified objectives of loyalty

programs include value perception; inducing cross-product buying by existing customers; maintaining or increasing sales levels, margins, market share and profits; lower price sensitivity; lower switching intention; positive word of mouth; positive customer feedback; re-patronage intention and decision; perceived relationship quality; customer lifetime duration; consumers' relational association toward the company, and likelihood of joining the membership (Mahoney & Palmer, 2005; Ha, 2008; East et al., 2005).

A few studies argue that ultimately behavioural loyalty is all that matters. Yoo (2011), for example, in his study of the impact of Las Vegas-based casino loyalty programs, measures only behavioural loyalty. In this study, Yoo analysed secondary data from a Las Vegas casino (i.e. monthly customer expenditure data from Jan 2003 to July 2011, totalling 17,902 "loyal" customers). He claims that attitudinal measures have limitations as proxy measures, are less realistic than behavioural measures, and are not ultimately as important for companies. Huang (2008), in a study of casino customers on the East Coast of the U.S., describe a loyal customer as one who rarely plays at other casinos, spends more because they can earn more benefits with repeat playing, and provides positive word-of-mouth to help casinos promote their brand.

4.3.5 Theory of loyalty programs

A significant body of literature exists on the theory of loyalty program effectiveness and is beyond the scope of this review. Very briefly, effects of loyalty programs are often explained by either economic utility theory or equity theory. According to economic utility theory, loyalty programs provide rewards that enhance the value and utility of a product or service, which in turn increases the likelihood of current and future purchases. According to equity theory, customers compare their purchase input, such as money, time, effort, etc., with outputs or gains to evaluate whether they have been treated equitably in the process (Bu, et al. 2009). "Loyalty programs provide incentives to customers in return for repeat business, which in turn serve as reinforcers that encourage consumers to continue their behavior.' (Keh & Lee 2006:127)

4.3.6 Regulations around gambling loyalty programs in Australia

Gambling policy in Australia has traditionally been the responsibility of the states rather than the Commonwealth. State and territory governments regulate and provide gambling help services and rely heavily on the ensuing revenue. Recently, the Federal Government has become more active in this area, both because of public concern over the impact of gambling on Australian society and the rapid expansion of online gambling, an area that falls within the Federal Government's constitutional responsibilities (Parliament of Australia, 2014).

The states and territories have a variety of regulations and guidelines that affect or potentially affect gambling loyalty programs based on a number of acts, codes, and other legislation. The Department of Social Services website provides a list of gambling regulations across the states and territories. Those related to loyalty programs include

advertising restrictions, promotions and inducement restrictions, prize restrictions, and restrictions specifically on player loyalty programs (Department of Social Services).

The table below presents a summary of the various types of restrictions by state or territory, current as at February 2014.

Table 4.2: Summary of legislation relevant to EGM loyalty programs

Category of legislation / guideline	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Advertising related to EGMs	✓	✓	✓	✓	✓	✓	✓	*
Gambling-related promotions & inducements (banned)		✓	✓		✓	✓		
Prizes		✓				✓		
Player loyalty programs	✓	✓	✓		✓	✓	✓	

** According to the Dept of Social Services website, WA does have restrictions around EGM advertising. We were unable to find any such restrictions.*

A detailed listing of regulations around loyalty programs by state and territory is included in the Appendix[20].

4.4 Gambling loyalty programs – Australian literature

Almost no research exists in either the academic or grey literature on gambling loyalty programs in Australia. Our search found just two such studies. Qualitative research with Victorian gamblers suggests that high risk and problem gamblers and gamblers from lower socio-economic groups view loyalty programs more positively and with less concern about possible risks than do other groups. Older women also hold more positive attitudes towards loyalty programs but say they are aware of the reasons for the benefits (to attract people to the venue) and simply view them as part of the social event (Haycock et al., 2011).

The Haycock et al. (2011) study consisted of interviews with 100 adults in Victoria who had gambled at least once during the previous year. Its focus was on understanding how participants viewed the various marketing strategies implemented by the gambling industry and how this understanding of and interactions with the gambling industry might vary by sub-group. Much of the article focused on discussions around advertising rather than loyalty programs. However, the study did find that about half of the participants were aware of incentives offered by the gambling industry -- mostly at EGM venues and online betting sites. The researchers also found some clear differences between sub-groups regarding perception of EGM loyalty programs. Older women who visited EGM venues said they enjoyed the benefits, such as “free meals and free drinks”, and understood why they were being offered these benefits but enjoyed them as part of the social activity. Older men and non-problem gamblers viewed these loyalty program offers more negatively and said that in the long-term you end up losing, so the risks of signing up outweighed the benefits. Younger men under 25 years, participants with low socio-economic status, and high risk and problem

[20] This list is current as at November 2015, as per feedback from peer reviewers.

gamblers were more positive about these programs; they focused on the benefits or rewards, rather than any risks. Younger men mostly discussed online gambling loyalty programs, whereas the other groups more often discussed EGM venues.

The second article found that discusses gambling loyalty programs in Australia examines seven marketing strategies, which include loyalty programs, employed by the 13 Australian casinos (Ahn et al., 2012). The purpose of the article was to advise casino managers on how to better promote their product. The article is purely descriptive and concludes that more research is needed to understand whether any of these strategies increases loyalty and profitability. It does, however, provide an overview of Australian casino loyalty programs.

The casinos all collect data on how often loyalty program members attend the venue, how much time they spend gambling, and how much money they spend. Most of the casinos reward players at different levels according to their expenditure. Loyalty program members also receive exclusive emails and newsletters to keep them up-do-date with the latest offers and benefits and can check and redeem their points online, thus engaging members in an on-going relationship in which casinos can interact directly with members[21]. Most of the programs provide privileges such as affinity groups, frequent buyer or visitor programs and customer clubs, and allow members to gain special access to private events, cash back programs, and exclusive entry to VIP gambling tables. Such “status” rewards are designed to reduce defection but may also encourage time spent at the casino. Some casino loyalty programs provide free parking and discounts or free meals in casino restaurants. Finally, most casinos give their members a small percentage of their play money back in addition to points and other rewards.

4.5 Gambling loyalty programs – international literature

Only slightly more literature exists internationally on gambling loyalty programs. The international research focuses on casinos and all but one of the casinos in the United States. Of the 14 articles, many come out of the University of Las Vegas Center for Gaming Research, with a majority of these discussing Las Vegas casinos specifically. To put this research in context, all legal EGM gambling in the United States occurs in casinos and virtually all casinos have loyalty programs. The market is very competitive and has become increasingly so since the start of the recession in 2008 which has impacted heavily on the U.S. gambling industry (Yoo, 2011). Moreover, most customers are aware of the benefits other casinos offer and so compare and pick and choose among the various programs (Huang, 2008). The literature speaks of a shift in the U.S. casino industry from a “program-centric” to a “customer-centric” approach, with power shifting from the casinos to the customers (Mahoney & Palmer, 2005).

[21] Findings from the latest gambling prevalence study in Victoria, released after this literature review was conducted, report an association between casino loyalty program membership and at risk gambling behaviour. In addition, this report states, “problem gamblers were significantly more likely than non-problem gamblers to have played in casino VIP areas and have played unrestricted gaming machines at the casino”. Such results highlight that there is potential to further research such initiatives from a consumer protection perspective. (Hare 2015:15; see also Ch.6)

These potential differences between the U.S. and Australian gambling industries should be kept in mind when considering this literature. In addition, all of this literature is written from an industry perspective, with its purpose often to recommend to casinos how they can “improve” their loyalty programs – in terms of increasing repeat visits, money spent, profits, loyal attitudes etc. No consideration is given to any of the potentially negative effects of loyalty programs on customers, including problem gambling, which is never mentioned.

4.5.1 Description of casino loyalty programs

Klebanow (2009), an advisor to the gambling industry in Las Vegas, describes what comprises loyalty programs in American casinos. Broadly speaking, many of their components appear to be similar to what we know about loyalty programs in the Australian casinos. The article describes the various “player reinvestments” offered by American casinos and presents the results of a survey indicating current reinvestment rates. Player reinvestment is defined as “all marketing expenses used to foster loyalty and encourage repeat visitation among members of a casino’s loyalty program.” (p.386). It does not include advertising production and placement, the costs associated with public relations, or any marketing expenses such as payroll, direct mail production and postage and promotional expenses that do not require membership in the rewards program. In the U.S., the gambling industry spends more effort and a greater proportion of its marketing expenditure on player reinvestments than any other segment of the hospitality industry. Once enrolled in a loyalty program, customers are issued magnetically encoded cards that they insert into EGMs or present to dealers when wagering at table games. Gambling activity is tracked through the casino’s information system. The system can then predict, based on each customer’s past behaviour and the games they typically play, how much the casino can potentially or theoretically earn from that customer each time that person visits the casino. Based on this information, the casino operator can design strategies to foster loyalty and encourage repeat visitation.

Components of player reinvestment consist of: points redeemed for cash or non-negotiable EGM credits, “comps” (meals; hotel rooms; entertainment; discretionary rewards), free play offers, direct mail in which some kind of incentive is offered (cash mailers; food, show tickets and hotel offers; other mailers – particularly on special days such as birthdays and anniversaries), special events, promotions, and bussing costs (reimbursing players who travel by tour bus for their travel costs if they spend over some minimum amount at the casino). The value of points redeemed as EGM credits are often discounted by the EGM hold percentage of the casino. “Comps” make up most of player reinvestment expenses. Free play offers are often used as an inducement to return or to celebrate a certain event such as a birthday. An individual’s chances to win the award offered as part of a promotion often improve with higher levels of gambling activity recorded on their membership card.

Analysis of player reinvestment consists of first calculating the “carded win”. This refers to the percent of revenue derived from people who use their membership card while gambling. The author states that the most successful gambling companies have carded

win rates above 75 percent. The second step of analysis is calculating and monitoring the player reinvestment rate. This is done by dividing the dollar-value reward to the customer by the dollar gains from that customer by the casino. Surveys indicate that this rate has risen as the economy in the U.S. has worsened – from around 20 percent in 2005 to 30 percent in 2009. The author states that when a casino player's reinvestment rate rises above 35 percent, it is essentially buying revenue but not profitability. From reviewing casino players' club programs across the United States, he identifies the major components as: direct mail, preferential treatment, interpersonal communications, rewards, and promotions.

4.5.2 Impact of casino loyalty programs

Most of the international literature on gambling loyalty programs attempts to answer the question of whether the programs "work". Conclusions partly depend on how effectiveness is measured – whether by change in behaviour, change in attitudes, total revenue, profits, or something else.

Overall impact

Findings regarding overall effectiveness of casino loyalty programs are mixed. An examination of 18 studies conducted between 1997 and 2009 examining the effectiveness of loyalty programs on behavioural variables found one negative impact, nine mixed, and eight positive (Yoo, 2011).

Many of the studies included in this review find that casino loyalty programs are not very effective. For example, in an American casino gambling industry-based study, Mahoney and Palmer (2005) conclude that loyalty programs have little impact on gambling behaviour and do not create loyalty. Similarly, Crofts' (2011) American casino-based review of literature argues that most studies find that loyalty programs are either not effective or minimally effective. McCall and Voorhees' (2010) literature review argues that there is little empirical evidence to demonstrate that loyalty program membership results in either increased loyalty or improvement in firm performance.

Baynes' (2011) Las Vegas-based study argues that instead of cultivating a relationship based on guest loyalty, casinos and guests have developed a business relationship, based on "give and take" through the use of loyalty programs. Customers, he argues, become members of multiple loyalty programs and see where they can get the best deal. In reaction, competitors simply copy each other's offerings. The biggest drivers of casino loyalty, he concludes, are convenience, guest service, environment and perceived value, not loyalty programs.

Other studies, however, argue that loyalty programs *are* effective (such as Shi & Wei's 2012 study of Macau casinos), although sometimes the impact is small or conditional. Min (2012), for example, analysing data collected by a Las Vegas casino over two years, found that the introduction of a loyalty program resulted in an increase in money spent at slot machines (the American term for "pokies") but not at the table games. He

was unable to conclude whether the program was profitable because he did not know how much the casino spent on the loyalty program.

A longitudinal study of data collected by a Las Vegas casino hotel concluded that loyalty programs change customers' behavioural levels and ultimately generate profitability (Yoo, 2011). Analysis was conducted utilising Auto Regressive Integrated Moving Average (ARIMA) models, which describe the current behaviour of variables in terms of linear relationships with their past values. Outcome variables included: total number of trips to the casino, daily dollar amount wagered in all slot machines, daily dollar amount wagered in all table games, total dollar amount of customer expenditure excluding gambling expenses, and total amount of customer revenue generated excluding company expenses. Variables included in the model that predicted the outcome variables included: total dollar amount for complimentary offers, month of the year, new tower (which had recently been built), economic recession, special event invitations for loyalty program members, tier level, and a trend variable to measure the effect of a trend across time.

Segmentation

Some evidence exists that casino loyalty programs are effective for specific sub-groups of customers. These studies all use cluster analysis to define their sub-groups and generally conclude the article by recommending that casinos focus their marketing efforts on these sub-groups. For example, a survey of 996 members of a loyalty program at a large Native American casino in the Midwest United States concluded that, of the six segments identified with enough people to analyse, just two were determined to be profitable – 'loyal big spenders' and 'transient big spenders'. Two others – the 'disloyal low spenders' and 'loyal low spenders' were determined to be potentially unprofitable; and two additional groups – 'infrequent big spenders' and 'frequent loyal low spenders' were found not to derive much benefit from the program because of low levels of play. Respondents were segmented based on how much they spent and percentage of time they visited their primary casino, as well as socioeconomic characteristics.

A cluster analysis of Las Vegas gamblers concluded that loyalty programs worked well for the "Elite Elders" segment (elite loyalty members , take most trips among members, sufficiently satisfied, not optimistic, oldest, predominantly male, high income) – both in terms of dollars spent and recruitment of others to the casino. But they worked poorly for the "Unmoved members" (regular loyalty members, lowest satisfaction among all members but inclined to recommend and return, take shorter trips), with the loyalty program changing neither attitudes not behaviours (Barsky & Tzolovl, 2010). Jeon (2009) compared members of multiple casino loyalty programs with people who belonged to only one program on socio-demographic characteristics, gambling behaviours, perceived value of loyalty program and attitudinal and behavioural loyalty. The methodology involved a data driven web-based survey of 2,222 loyalty program members with email addresses who had visited a large casino in the Southeast United States in the prior 12 months. The main findings were that the majority of respondents belonged to multiple casino loyalty programs, and that these members perceive less value in the loyalty program, lower perceived switching cost, less satisfaction with the program, and less attitudinal and behavioural loyalty.

Whereas the above research is interested in understanding differential effects of loyalty programs on sub-groups of loyalty program members, a study by Baloglu and Tanford (2012) is merely interested in segmenting the loyalty program population. They confirm that a loyalty matrix that classifies customers into four quadrants based on behavioural and attitudinal loyalty previously tested in the hospitality sector also applies to casino loyalty program members. Using data gathered from a survey of 261 customers of a small Las Vegas casino over one month plus actual spending data, they found that members clustered into four groups: “true loyalty” (high on both behavioural and attitudinal loyalty), “spurious loyalty” (high on behavioural loyalty, low on attitudinal loyalty), “latent loyalty” (low on behavioural loyalty, high on attitudinal loyalty), and “low loyalty” (low on both behavioural and attitudinal loyalty). Behavioural loyalty was measured by amount of money spent and visitation frequency; attitudinal loyalty was measured by questions asking about emotional attachment and trust. They recommend that companies focus on the true- and latent-loyalty customers in their marketing efforts.

Rewards

In addition to investigating the impact of loyalty programs as a whole, and perhaps in response to the generally mixed findings regarding overall effectiveness, other studies have investigated the impact of individual program components on outcomes. Components studied in the casino context include type and timing of rewards. “Direct” or “hard” rewards include discount coupons, cash back for a percentage of loss, free meals, or free hotel rooms; “indirect” or “soft” rewards can consist of special treatment or recognition from casino staff or personalised communications. Rewards can also be immediate (e.g. upon becoming a member) or delayed (e.g. once enough points have been accumulated) (Huang, 2008; Meczka, 2010). Huang (2008) found that timing of an award does not lead to customer loyalty but that all three types of rewards included in the model – monetary, special treatment, and employee interaction – did. Their study involved path analysis with survey data from 151 loyalty program customers of a casino on the east coast of the United States.

Meczka (2010), in a review of the literature on loyalty programs, argues there is inconclusive evidence as to whether “hard” or “soft” rewards are most effective in generating long-term loyalty. Theory predicts that “hard” rewards will ultimately have a positive effect on customer loyalty, as these recipients have stronger behavioural loyalty. However, they argue that his loyalty may be to the reward rather than to the brand.

4.5.3 Best practice in casino loyalty programs (from an industry perspective)

Some of the literature on gambling loyalty programs focuses not on testing hypotheses regarding program impact, but instead provides recommendations to industry regarding how they can improve the effectiveness of their loyalty programs. These recommendations are usually based on a review of the literature and/or personal experience. These recommendations include understanding the emotional needs, values and preferences of their customers and potential customers (Hendler & LaTour,

2009; Baynes, 2011) and then targeting marketing to these different needs (Hendler & LaTour, 2009). Loyalty programs, it is argued, should focus on “true loyalty”, which is acquired through great service, not promotions and prizes (Baynes, 2011). Other recommendations include providing better employee education and training around details of the loyalty program; ensuring support and endorsement of the program from upper management; properly and adequately promoting the program to customers (Crofts, 2011); providing an integrated rewards program across the casino incorporating gambling, accommodation, food and beverages; and targeting customers in the top tier of the loyalty program (Smith, 2011).

Meczka (2010), in a literature review of complimentary rewards programs at casinos, provides a number of recommendations regarding such programs. Complimentary benefits (“comps”) are redeemable rebates provided to players on a complimentary basis in order to reward past play or as an incentive for future patronage. He argues that casinos should better align their loyalty program(s) and rewards provided within that program with the needs and expectations of all customers rather than just the “high rollers” (i.e. those in the top tier). While a tiered structure is said to “appeal to human need for achievement”, he argues there are both benefits and limitations to such a structure. Finally, he finds the evidence is inconclusive as to whether “hard” or “soft” rewards are most effective in generating long-term loyalty. Theory predicts that “hard” rewards will ultimately be more effective, but induce loyalty to the reward rather than the brand (the casino).

4.6 Loyalty programs outside the gambling industry

Given the dearth of literature on loyalty programs in the gambling industry, the rest of this review discusses loyalty programs in general, or loyalty programs in industries other than gambling in which the findings may be relevant to gambling loyalty programs. Most of these latter studies involve the hotel or retail industries.
The assumption is that the basic mechanisms underlying customer loyalty programs cross industries. Moreover, aspects successfully trialled in one industry will likely be borrowed by other industries such that gambling loyalty programs resemble in many ways loyalty programs in the retail, grocery, hotel, and other industries. As with the literature on gambling loyalty programs (with the exception of the Victorian gambling study), these studies are written from a marketing perspective, with none discussing possible adverse effects of the programs on customers and instead considering only potential gains by industry. Unlike the gambling loyalty program literature, country of origin is more diverse, with a number of articles focused on programs and industries outside of the United States.

4.6.1 Impact of loyalty programs outside the gambling industry

As with the research on gambling loyalty programs, studies on loyalty program effectiveness either in general or in other industries produce mixed findings. The general consensus seems to be that overall effectiveness is small but the impact differs across consumer segments and markets (Bijmolt et al., 2011).

Overall impact

The hope of industry for loyalty programs is that they improve loyalty, which results in large increases in sales and profit (Sharp, 2010:171). The evidence, however, is decidedly mixed, with most reviews of the literature concluding that effects are positive but small (Bijmolt et al., 2011). When loyalty program members are simply compared with non-members, it appears that members have greater loyalty, however loyalty is measured (Ha, 2008). But once self-selection is controlled for, differences appear to be minimal or disappear (Sharp, 2010). In other words, rather than loyalty programs creating loyalty, it seems that those more loyal to a company become loyalty program members. Beck, Henderson and Palmatier (2011), however, argue that researchers may be underestimating the effect of loyalty programs in the way they design their studies.

Simple comparison of members with non-members

When loyalty program members are compared with non-members, it appears that loyalty programs have a significant impact on outcomes. For example, a survey of resort visitors in the United States found that loyalty program members compared with non-members identify more strongly with a company or brand and report higher levels of satisfaction, loyalty and delight (Kim et al., 2011).

A study involving intercept interviews with 888 shoppers of a large German DIY store found that the association between "conative loyalty", defined as the desire to intend an action, and purchasing behaviour was stronger for loyalty program members than for non-members (Evanschitzky & Wunderlich, 2006). In contrast, a study in which loyalty program members were automatically enrolled in the loyalty program based on purchasing history, rather than actively choosing to enrol, showed only a limited impact of membership on six different relational outcomes (Lacey, 2009). In this study comparing members and non-members of an upscale U.S. department store loyalty program, the only positive impact of the loyalty programs was in increasing purchases and providing complaint feedback.

Controlling for self-selection

When self-selection, whereby consumers who are already more loyal are also more likely to enrol in loyalty programs, is controlled for, impact is usually minimal. A study of grocery store loyalty program members that controlled for self-selection found only a small, though significant, effect of loyalty program membership on behavioural loyalty share of wallet (Bijmolt, Leenheer, Smidts, & van Heerde, 2007). In this panel data study with a representative sample of Dutch households, the researchers compared a "naïve" model, in which members were simply compared with non-members, with a model in which self-selection into loyalty programs was controlled for. They found that the effect of the more complicated model was seven times smaller than that of the naïve model, indicating that most of the impact of membership is simply that more loyal customers tend to become loyalty program members, rather than that the loyalty program increases purchases. They found that loyalty programs increase membership in the program but do not increase loyalty once enrolled. Indeed, 86% of the effect of being a member on share-of-wallet disappeared when self-selection was controlled for. Share of wallet refers to the percentage of grocery-store purchases made at one store versus another.

When Arranz et al. (2006) simply compared members with non-members of a grocery store chain in Spain on various measures of behavioural and attitudinal loyalty, they found several differences in loyalty: members showed greater behavioural loyalty to the retailer, less behavioural loyalty to other retailers, a more positive attitude towards the retailer, greater level of satisfaction, higher trust, and greater level of commitment. However, when the researchers looked at change in behaviour after enrolment in the loyalty program, they found that participation in loyalty programs did not cause a change in most consumers. The authors conclude that the main role of loyalty programs is to retain already loyal customers, and that "[o]ther services such as variety, prices, location or employees are more important, and the retailer must be focused on these in order to attract potential consumers and, after that, maintain a base of loyal customers" (p.394).

Sharp (2010) controls for self-selection by seeing if brands that run loyalty programs have unusual loyalty for their market share. He argues that if loyalty programs are effective, brands with loyalty programs should have a market share made up of unusually high loyalty and low penetration. Based on a study of an Australian/New Zealand loyalty program (FlyBuys), as well as a similar study in France, he concludes that loyalty programs produce very slight loyalty effects, do almost nothing to drive

growth, and likely result in negative effects on profits. He argues that a fundamental problem with loyalty programs is that they skew towards heavier, more loyal buyers of the brand. This is largely due to physical and mental availability – it is easier for more loyal buyers to notice the loyalty program and enrol, and they have a much greater economic incentive to join since they will be rewarded for doing what they are already doing.

Beck et al. (2011), however, argues that most research investigating the impact of loyalty programs is faulty for three reasons. First, they argue that whereas studies overwhelmingly use a one-dimensional lens, most loyalty programs simultaneously engage multiple psychological mechanisms. Behavioural change resulting from loyalty programs, they claim, typically results from (1) conferring status to consumers, which generates favourable comparisons with others; (2) building habits, which causes advantageous memory processes; and (3) developing relationships, which results in more favourable treatment by consumers. Regarding the first point, they provide the example of the company, Starbucks, which a few years ago decided to discontinue its poorly performing loyalty program, which required a registration fee and offered special discounts to members. Although its individual components seemed to follow recommendations for successful loyalty programs – it conferred a sense of status to customers, reinforced habitual purchases, created a relationship between customers and the company, and allowed customers to advertise their status to outsiders, the interaction of these mechanisms was ultimately unsuccessful. The researchers also argue that most studies measure the impact of the loyalty program only on the target groups of interest rather than also considering impact on others ("cross-customer effects"). They provide as an example research that examines Alaska Airlines' policy of handing out free-drink coupons to "premium" customers without examining how this program might affect non-premium customers. Finally, they argue that most studies are conducted at a single point in time, yet the effects can occur and develop over time ("temporal effects").

Structural components / rewards

A number of studies on loyalty programs and their effectiveness consider specific components of loyalty programs rather than the program as a whole, such as how they are structured or the types of rewards or ways in which rewards are earned and granted. This section of the review presents literature on program tiers, rewards distance, step size, rewards type, and rewards timing. McCall and Voorhees (2010), in a review of the literature on drivers of program effectiveness, argue that the structure of the loyalty program, structure of the rewards, and customer fit with the loyalty program can all impact program effectiveness. Actual financial impact, however, is generally unknown.

Tiers

Loyalty program tiers or hierarchies award preferred customer status, providing exclusive benefits to consumers who exceed a certain spending amount. Tiered programs appear to be more effective than non-tiered programs, both because they provide a sense of identity to members and also because the tiers can be used to

further segment customers to subsequently provide differentiated rewards for different customer tiers (McCall & Voorhees, 2010; Tanford, 2013; Kopalle, Neslin, Sun, Sun, & Swaminathan, 2012).

Tanford (2013), in an online survey of 800 members of a U.S. hotel loyalty program, found significant differences between tiers on all measures of attitudinal loyalty, behavioural intentions, and behavioural loyalty. These measures included emotional commitment, trust, switching costs, revisit intentions, word of mouth, proportion of hotel nights at the preferred program hotel brand, frequency of hotel stays at the preferred program hotel brand, and satisfaction. Kopalle et al. (2012), in a study of 3,907 members of a major U.S. hotel chain which examined the impact of the combination of frequency reward (e.g. buy 9 and get the 10^{th} free) and customer tiers on loyalty programs, found that frequency reward and customer tier both generate incremental sales and that the two together increase sales slightly, and do not interfere with each other. If the consumer does not maintain a certain level of spending, however, she can be demoted to a lower level or tier. Customer demotion from a higher to a lower tier reduces loyalty intentions toward a firm to a level that is lower than the level of loyalty intentions the customer held before being elevated to the higher tier status. The firm can slightly moderate this negative effect by offering an apology, although monetary compensation appears to have no effect (Hennig-Thurau, Rudolph, & Wagner, 2009).

As for ideal number of tiers, given choices between various options those who do not qualify for a higher-status tier prefer multiple tiers. A three-tier program appears to be preferable across all members of a loyalty program as compared with a two-tier program. Increasing the number of people in the top tier of a loyalty program tends to dilute perception of status whereas adding a tier below the top tier enhances status. Adding tiers below the second tier does not appear to impact those at the top, but can make those in the tier immediately above feel more elite. But the size of the subordinate tier is important; the larger the second tier, the less special the top tier feels. A second elite tier can help shield those in the top tier from program changes, especially when a new, superordinate tier (e.g. “Platinum”) is added. Status labels applied to tiers, such as “gold”, “silver” and “platinum”, in and of themselves, and regardless of what percentages of members are in each or exactly what benefits are received at each level, signal status (Drèze & Nunes, 2009). In additional, evidence indicates that customers accelerate their purchasing behaviour as they approach the next tier (Kivetz, Urminsky, & Zheng, 2006).

Finally, there is some discussion in the literature regarding whether tier influences only program loyalty rather than brand loyalty. Tanford (2013), however, concludes that tier influences brand loyalty as well as program loyalty. There is also evidence that increasing the value of the rewards by customer spending tier has enduring effects on brand loyalty (McCall & Voorhees, 2009; Roehm, Pullins, & Roehm Jr, 2002).

Rewards distance & step size

“Rewards distance” refers to the number of points required to redeem a reward. “Step size” is the number of points earned per dollar. Absolute sizes of the reward distances and step sizes are referred to as “program magnitude”. For example, a high magnitude program might have a reward distance of 1,000 points and step size of 10 points per

dollar. This compares with a low magnitude program with a reward distance of 100 points and a step size of 1 point per dollar. Although the absolute numbers are larger in the high magnitude program, the effort required to obtain a reward is identical.

Bagchi & Li (2011) conducted experiments in two different contexts – a grocery loyalty program and a restaurant loyalty program, to investigate how reward distance and step size affect consumers' post-enrolment inferences of progress, store loyalty, and recommendation likelihood. They found that when step-size ambiguity is high (i.e. consumers are unsure how many points they receive per dollar spent), only reward distance affects inferences. When ambiguity is lower, both step-size and reward distance affect inferences, but in a biased manner. If step-size ambiguity is low and program magnitude is low, those closer to the reward will judge progress to be higher, be more loyal, and be more likely to recommend the program. However, when program magnitude is high, the differences between those close to the reward relative to those far from it will be attenuated.

Reward type and timing

Loyalty programs may offer direct (tied to the brand) or indirect rewards as well as rewards that are immediate or delayed. In addition, rewards may vary in magnitude and frequency (Hu, Huang, & Po-Tsang, 2009). The evidence indicates that impact varies depending on individual consumers' situations and attributes (McCall & Voorhees, 2009). Customers tend to prefer economic rewards over other direct rewards and indirect awards. Low-involvement customers, however, appear to have no preference regarding type of reward (McCall & Voorhees, 2009).

Hu et al. (2009), in a study of hotel loyalty programs using an experimental design with data from a convenience sample of people in a Taiwan international airport, tested a number of hypotheses regarding how the timing of rewards (immediate vs. delayed) affects customer loyalty and whether the effectiveness of these reward structures is moderated by customer satisfaction. Immediate rewards are discounts or price cuts offered to customers at the point of sale; delayed rewards are benefits and incentives that are obtained or redeemable at a later date from the point of sale. The researchers found that immediate rewards have a greater impact on value perception than do delayed rewards. However, delayed rewards can impact value perception as long as the delayed rewards have a significant value to the consumer.

There is evidence that if customers are satisfied, delayed rewards work better than immediate rewards, whereas if customers are dissatisfied, immediate rewards work better than delayed rewards (Hu et al., 2009; Keh & Lee, 2006). When required consumer effort is low, consumers prefer low-magnitude, guaranteed rewards. But as effort increases, they prefer larger rewards even if they are less certain (Kivetz, 2003).

Choi, Jeon and Yi (2013) conducted experiments amongst undergraduates at private universities in South Korea to examine the role of perceived uncertainty in whether consumers preferred aggregated (one big) or segregated (several smaller) rewards in their loyalty program. Perceived uncertainty refers to the extent to which consumers are not sure of receiving any incentives (i.e. unpredictable, random rewards schedules). They found that when perceived uncertainty is higher, consumers prefer a

segregated option (i.e. several smaller rewards/discounts); when perceived uncertainty is low, they prefer an aggregated option (i.e. one large reward/discount). The authors conclude that rewards programs providing unexpected benefits can enhance the effectiveness of a loyalty program.

Segmentation

In addition to impact of program components on loyalty or other outcome measures, studies have investigated how different sub-groups of consumers interact with loyalty programs. These segments are based on loyalty program behaviours or attitudes, and consumer demographics. A study attempting to explain the mixed findings regarding the effectiveness of loyalty programs found that a loyalty program may be effective even for customers who are low in behavioural loyalty if they are high in attitudinal loyalty. Conversely, they conclude that such programs may not be effective for customers with high behavioural loyalty if they have low attitudinal loyalty (Bu et al., 2009). These findings, however, may be affected by a regression to the mean effect whereby extreme values tend, over time, to shift to a less extreme position. The study analysed customer transaction data over one year for 1771 VIP customers of a large department store chain in Korea. Because the data covered a period of time during which the company introduced its first VIP loyalty program, it was possible to directly analyse the program's impact on customer behaviour at the individual level. Attitudinal loyalty was measured as the proportion of purchases made at the regular price when other brands were on special.

Bijmolt et al (2011), in a review of the literature, compares low, moderate, and frequent buyers and concludes that loyalty programs increase spending levels and frequency of purchasing of low and moderate (but not frequent) buyers. Kopalle et al. (2012), in a secondary data analysis of U.S. hotel loyalty program members focused on frequency reward and customer tiers, define two member segments – a "service-oriented" segment that highly values cash-ins for room upgrades and "luxury" prizes, and a "price-oriented" segment that is more price sensitive and highly values the frequency reward aspects of the loyalty program. An analysis of status by gender among undergraduate students in New Zealand finds that men respond more positively than women to loyalty programs that emphasise status, but only when their higher status is highly visible to others, whereas women respond more positively than men to loyalty programs that emphasise personalisation, but only in private settings (Melnyk & Osselaer, 2012).

Finally, Ferguson and Hlavinka (2008) found distinctive differences in attitudes and behaviours around loyalty program participation among five demographic groups of interest to marketers in the United States: affluent population (highest program participation rate, high level of program participation recall); young adults (lower program participation rate, but high recall rate); emerging Hispanics (lower program participation rate, but high recall rate); core women: 20s-retirements age (slightly higher than average participation rate); and seniors (slightly lower than average participation rate). Attitudes and behaviours analysed included program benefits they liked, their level of engagement and what they wanted from a loyalty program, redemption patterns, levels of customer satisfaction, and composition of non-members.

The role of customer satisfaction

Customer satisfaction is discussed separately here because it is conceptualised in a variety of ways in the literature. Overall, there is mixed evidence regarding the role of customer satisfaction in loyalty. Beck et al. (2011), for example, argue that most empirical research that includes satisfaction in their evaluation of loyalty programs' effectiveness models satisfaction as an independent driver of loyalty rather than as a mediator of its effect on performance (Hu et al., 2009; Azrin, Hanita, & Nor Asiah, 2009; Costabile, Miceli, & Raimondo, 2008). They argue that satisfaction research typically focuses on the influence of the core offering on behaviour whereas loyalty program research focuses on augmenting the core offering to influence behaviour beyond the effects of consumer satisfaction. Some studies, however, include satisfaction as a mediating variable. Berezan (2013), for example, in a path analysis of determinants of loyalty in the hotel industry, posits customer satisfaction as a mediating variable between information quality and communication style, and loyalty.

Other research finds little or no correlation between customer satisfaction and loyalty (Mahoney & Palmer 2005; Huang, 2008). Arranz et al. (2006), in contrast, in a review of the literature, state that customer satisfaction is a key component of attitudinal loyalty. Noble and Phillips (2004) conducted a qualitative study to understand why satisfied customers would *not* want to be loyalty programs members. This study, involving a diverse group of participants including casino players in the Southeast United States, found that the most prevalent reasons included: unenticing benefits; initiation that was too complicated or time-consuming (e.g. long lines; long forms; just generally the time required); accumulation (i.e. the amount of time or number of purchases required to obtain some benefit); and mental energy (to keep track of all the loyalty cards, pin numbers etc.).

Additional research focuses on aspects of loyalty program effectiveness that fall outside of the categories of structural component or rewards, or consumer segments. These include relational equity and relationship age, communication of the loyalty program to members, and loyalty program distinctiveness and identity relevance. These studies are discussed below.

Relational equity and relationship age

In a survey with a convenience sample of mobile phone users in Italy, Costabile et al. (2008) tested the hypothesis that relationship age moderates the impact of relational equity on loyalty. Relational equity was defined as "the customer perception of the proportionality between her or his own benefit-cost ratio and the firm's benefit-cost ratio within a continuous customer-provider relationship" (p.142). They found that relational equity has a positive independent influence on both attitudinal loyalty (a favourable attitude toward a firm or brand, relative to other similar firms or brands) and behavioural loyalty (repeated buying behaviour), and that the effects of relational equity increase along with relationship age. Other determinants of loyalty included in the model in addition to relational equity were satisfaction, trust, and perceived value.

Communication

Two studies examined associations between how a loyalty program is communicated to customers and loyalty. The first study involved an online survey of hotel loyalty program members, mostly in the United States. Communication channels included the company's website, personal communications from the company, online member discussions such as forums, and personal communications by the member. The study found that the channels through which the program is communicated, the style and quality of that communication, and the extent to which a communication message matches someone's image of themselves all impact on loyalty (Berezan, 2013).The second article focused on how companies choose to frame their reward program to consumers. A review of the literature indicates that rewards are best communicated as "additional perks" provided to loyalty customers at the company's expense (McCall & Voorhees, 2010). In addition, an effective loyalty program involves developing a program that fits with its customers' needs, both in terms of their spending behaviours and program requirements, as well as emotional needs.

Loyalty program distinctiveness and identity relevance

Related to self-image congruence is "identify relevance". Ha (2008) defines identity relevance as the fit between rewards offered by a loyalty program and a consumer's identity needs (i.e. goals). This online experimental study conducted with female U.S. undergraduate students finds that the distinctiveness of the loyalty program and identity relevance both influence consumer membership identity, which in turn affects loyalty (Ha 2008).

4.6.2 Best practice / future of loyalty programs

Whereas most research on loyalty programs discusses their impact, whether as a whole, by individual components, or by member segments, some are specifically concerned with providing advice to companies regarding loyalty programs.

A number of researchers argue that the real value of loyalty programs is not in changing attitudes or behaviours or indeed increasing "loyalty", but in compiling a detailed customer database on customers' demographics and spending habits (Bijmolt et al., 2011; Arranz et al., 2006; Kerr, 2009). This database can then be used to target special consumer segments (Berman, 2006; Huang, 2008), develop a marketing campaign to target new customers who share similar profiles (Huang, 2008), produce higher average sales due to cross-selling and up-selling opportunities and increase product recall (Berman, 2006), develop training and hiring schedules, and test market responsiveness via promotions (Mahoney & Palmer, 2005). Bijmolt et al. (2011:231) state, "firms whose loyalty programs are able to efficiently leverage the data of their cardholders and introduce better targeted promotional campaigns have bigger chances of succeeding in the long run". Setting up and analysing such data, however, can be difficult and time-consuming (Drèze & Nunes, 2007; Sharp, 2010). Regardless of whether loyalty programs are effective, Chen and Xie (2013) argue, loyalty programs

are here to stay so companies should strive to maximise the merits and minimise the drawbacks.

In addition to compiling and analysing a customer database, money and expertise permitting, researchers provide the following recommendations regarding what companies should do to run a successful loyalty program. Given the long list, it is unlikely any single program could incorporate all of this advice. The recommendations can be categorised as “structural”, “rewards”, and “strategic”.

Structural

- Make the program simple (Ho et al., 2009)
- Ensure that the loyalty program consists of more than just discounting. Discounting encourages other companies to do the same which merely encourages price shopping (Drèze & Nunes, 2007)
- Provide new members a sense of momentum by giving them a “jump start” when they enrol, keeping in mind that the customer should see this as earned rather than an entitlement or it may have a negative effect (Drèze & Nunes, 2007). People value more a reward they have to work to get (Papadatos, 2006).
- Strike the right balance of “divisibility of rewards” (e.g. how many points you need before you can redeem), factoring in expected yearly program usage and the amount of company differentiation, as well as customers’ preference for highly divisible programs (Drèze & Nunes, 2007)
- Expand the relationship by encouraging customers to make additional purchases of that brand but for a different product (e.g. a free pastry after buying nine coffees, rather than a 10th coffee free) (Drèze & Nunes, 2007)
- Provide combined-currency flexibility. Research shows that people like to purchase with a combination of cash and points rather than all of one or the other; it lowers the psychological cost (Drèze & Nunes, 2007).

Rewards

- Avoid rewarding disloyal customers. Reward the use of the card over time instead of on a given purchase occasion, and provide larger or special rewards to more loyal customers (Drèze & Nunes, 2007; Ho et al., 2009)
- Provide “sticky” rewards (memorable, pleasure providing rewards that stick in people’s minds) rather than functional or utilitarian rewards. They should be something special that loyal customers do not plan to purchase at a regular price but may purchase elsewhere. These types of rewards both get people excited about the program and also create pleasant associations with the brand (Drèze & Nunes, 2007; Ho et al., 2009)
- Include less expensive rewards. Customers are often happy with costless or low cost rewards, such as preferential treatment for members (e.g. shorter lines or waiting times), or coupons rather than straight discounts (Drèze & Nunes, 2007)
- Structure the rewards to create incentives that are good enough to change behaviour but not so generous that they erode margins (Drèze & Nunes, 2007)

Strategic

- Clarify short- and long-term business goals. Specify exactly what outcomes are intended (Drèze & Nunes, 2007; Kerr, 2009).
- Offer good-value, imaginative programs (Capizzi & Ferguson, 2005)
- Differentiate the program from competitors' (Kerr, 2009);
- Look for unique and exciting program partners (Capizzi & Ferguson, 2005)
- Avoid rewarding volume over profitability. Keep track of the profitability of customers. Harrah's Entertainment, for example, tracks the types of gambling that people do and focuses on its most profitable customers. Some games are more profitable than others, so it will provide greater rewards for customers who play more of the more profitable games (Drèze & Nunes, 2007)
- Only promise what can be delivered, especially if members can easily compare the service or reward provided members and non-members (e.g. how fast lines move). Moreover, customers do not compare averages with averages; they compare extremes with extremes, so ensure the lower bounds of premium service never look worse than the standard service (Drèze & Nunes, 2007).
- Take into account consumer psychology. People want a fair value exchange, so loyalty programs need to build emotional connections to their brands (Drèze & Nunes, 2007; Papadatos, 2006). There are two stages to rewards – the immediate, positive feeling following getting the reward, and then the delayed, emotional feeling of having achieved something (Papadatos, 2006).
- Implement a program that is multi-faceted, meaning a program that is not linked with only one area of the business but all areas (e.g., rewards/points based on gambling expenditure as well as food and beverage expenditure; a program that allows members to use the program at interstate venues) (Kerr 2009)
- Focus on customer engagement in order to build a transactional database of customer behaviour (e.g. a database that includes likes/dislikes of its customers) (Kerr 2009)
- Implementation or changes to programs should be made after a detailed financial cost-benefit analysis has been conducted (Capizzi & Ferfuson 2005)
- Talk to customers and gain feedback that can help build the program; build qualitative data sets (Capizzi & Ferguson 2005)

4.7 Discussion & gaps in the literature

Discussion

Little research exists in either the academic or grey literature on gambling loyalty programs in Australia. For the purposes of this project, the most relevant such study is the aforementioned Victorian gambling study, which found that problem gamblers and those with lower socio-economic status may view loyalty programs more favourably and be less cognisant of potential risks than other consumers. Although this study was limited to 100 participants, all of whom live in Victoria, it is nevertheless an important finding worth following up with a larger and more diverse sample.

The international literature on gambling loyalty programs focuses exclusively on casinos, mostly in the United States, with a majority of these in Las Vegas. Findings from most of the casino studies and the broader literature on loyalty programs indicate that the impact of loyalty programs on loyalty attitudes and behaviours is minimal when self-selection (the tendency for more loyal customers to join loyalty programs) is controlled for. Loyalty programs appear mainly to reward loyal customers for doing what they are already doing. The impact may be greater, however, or take different forms, for some customers than others – for example, lower-frequency versus higher-frequency consumers, men versus women, and various groups segmented by a combination of demographics and purchasing behaviours and attitudes. The evidence, however, is limited.

The way in which a loyalty program is structured may influence the impact of problem gambling. Various loyalty program studies discuss “optimal” number of tiers, number of points required to redeem a reward, number of points earned per dollar, direct versus indirect rewards, and immediate versus delayed rewards. Other studies focus on how a program is “best” communicated to members to obtain “optimal” results, impact of relationship age, and impact of program distinctiveness and the extent to which the program taps into a consumer’s self-perceived identity. Therefore, it is possible that if gambling loyalty programs were designed according to “best-practice” principles and marketed to target particular sub-groups of gamblers, they might produce significant effects, although again the evidence on efficacy is limited.

Finally, several articles are devoted to providing industry with recommendations for establishing an “effective” loyalty programs now and into the future, although these are mostly based on reviews of the existing evidence and, in some cases, personal experience, rather than empirical studies. A number of studies discuss the importance of compiling and analysing a customer database in order to more effectively target marketing activities, although the authors point out that this requires significant time, money and expertise. None of these articles, however, addresses the issue of what industry should be allowed to do with the customer database information. The assumption seems to be that they should have free rein to do whatever they want with it. In the context of the gambling industry, however, and particularly given the concerns around problem gambling, this issue should be addressed.

Gaps in the literature

Substantial gaps are evident in the evidence base regarding the impact of loyalty programs on gamblers, and particularly at-risk gamblers. First, there are simply no studies on Australian gambling loyalty programs, other than the two studies that mention loyalty programs as part a broader discussion of marketing programs. As a result, little evidence exists concerning either the structure of loyalty programs or the impact of these programs on gamblers. Second, of the 54 studies included in this review, only the Victorian gambling study is *not* written from a marketing perspective. None of these other 53 articles considers potentially negative impacts of the program on the consumer, their family and friends, or the community. Typical of the literature is the following statement regarding the impact of loyalty programs on consumers from an article that reviews the evidence on loyalty programs: “From the consumer perspective, loyalty programs are beneficial since they offer rewards for purchases.” (Bijmolt et al., 2011: 230) Third, more evidence is needed regarding the differential impact of loyalty programs on various sub-groups of gamblers. There is some hint from the non-gambling literature that particular segments of consumers respond to programs differently. Similarly, greater understanding is needed about how the structure of the program, types of rewards, manner in which the program is communicated, and so on, impact on gamblers.

Finally, little literature exists regarding whether a successful loyalty program merely increases loyalty to one brand at the expense of another, resulting in a zero-sum gain in terms of total spending, or whether it in fact increases total spending. In reference to gambling, it is important to understand whether loyalty programs merely encourage gamblers to, for example, attend a single venue rather than dividing their time across gambling venues, or whether they increase total amount of gambling, whether measured by number of visits, or time or money spent. Much of the non-gambling loyalty program literature seems to assume the former but sometimes also argues the latter. A number of studies, for example, use “share of wallet” as an outcome measure, which refers to the percentage of total purchases within an industry of a particular brand, store, or company. For instance, a particular grocery store might receive 80% share of wallet of a customer who buys 80% of her groceries from that grocery store and the remaining 20% at other grocery stores. However, other studies measure increased overall spending. Huang (2008: 2), for example, state that a loyal customer “rarely switches to other brands and spends more because they can earn more benefits with repeat purchase behavior”.

4.8 Conclusions

Currently all but one of the Australian casinos and approximately 18% of Australian club and pub/hotel EGM venues have loyalty programs, and judging by international figures this percentage is likely to increase.

Problem gambling, while affecting a small percentage of the population, can have devastating effects on the gambler, their family and friends, and the larger community. There is concern that loyalty programs provide an inducement to individuals to play EGMs more often and for longer periods of time than would otherwise be the case and to potentially reduce a gambler's capacity to maintain control over their gambling behaviour (Productivity Commission 1999). Yet little evidence exists that addresses this issue.

The somewhat limited research on loyalty programs does not generally find a large connection between loyalty programs and increases in attitudinal or behavioural loyalty. However, the one study that examines Australian gambling loyalty programs finds that problem gamblers and gamblers from lower socio-economic status express more positive attitudes towards such programs and mention fewer possible negative impacts.

It is therefore imperative from a public policy and public health perspective to understand the impact of loyalty programs on gamblers in order to ensure that these programs do not contribute to the risk of problem gambling.

5 Online discussion boards

5.1 Objectives

The objective of the online discussion boards was to provide in-depth, qualitative data on personal experiences of loyalty program members with loyalty programs and perceptions regarding impact of the programs on attitudes and behaviours around gambling.

The findings from the boards were also used to devise topics and questions for the longitudinal survey instrument.

In this discussion, the following terms will be used:

- *Problem gambler*: categorised as a problem gambler according to the PGSI, which was used as a screener when recruiting participants for the online discussion boards.
- *Lower-risk gambler*: categorised as a moderate-risk, low-risk, or no-risk gambler according to the PGSI
- *[venue type]_High*: Participant in one of the "problem gambler" groups
- *[venue type]_Low*: Participant in one of the "lower-risk gambler" groups

The terms, "pokies" and "EGMs" are used interchangeably. Because most participants referred to this type of gambling product as "pokies", this is the term more often used in this section of the report.

Any spelling or other mistakes in comments made by participants have generally been left as written, unless changes were needed to assist with comprehension.

Reading tables

Because the sample of participants is not a probability sample, statistically significant differences between groups cannot be calculated. However, substantively large differences (usually 10 percentage points or more) are indicated. The following convention is used in the tables.

Green bold type = considerably **lower** percentage compared with other groups
Red bold type = considerably **higher** percentage compared with other groups

The discussion boards included both open-ended topic questions, to which participants typed in responses, as well as a number of survey questions with closed-ended responses. Because of a problem with the software, survey data for Club_High participants was not recorded and thus this data is not included in the tables.

5.2 Methodology

5.2.1 Background

Online discussion boards are online “bulletin boards” in which participants can share and discuss information and opinions over a period of days or weeks. Online discussion boards have several advantages over traditional face-to-face focus group interviews in addition to saving on travel costs, including:

- Convenience for participants
- Reduced social interference
- Reduced “group think”
- Greater chance for reflection
- Better control by moderator
- Automatic transcription (Lim & Tan 2001)

Additional advantages include:

- Ability to show audio and visual content
- Improved openness due to anonymity

Views of non-problem, low-risk, moderate-risk and problem gamblers who are currently members of gambling loyalty programs were sought in order to understand the different ways in which these groups interact with loyalty programs. Risk level was assessed using the 9-item PGSI (Ferris & Wynne, 2001).

According to the PGSI, population estimates for each category are (Dept of Justice: Prevalence of Problem Gambling)

- Non-problem gamblers (score of 0) 64.3%
- Low risk gamblers (score of 1-2) 5.7%
- Moderate risk gamblers (score of 3-7) 2.4%
- Problem gamblers (score of 8-27) 0.7%
- Non-gamblers..... 26.9%

However, it is generally agreed that gambling risk is somewhat higher for EGM players (Dept of Justice: Electronic Gaming Machines).

Because casinos, hotels and clubs offer significantly different gambling experiences, including types of loyalty programs, separate discussion groups for each venue type were conducted. If a participant was a member of more than one type of loyalty program (e.g. club and casino), they were placed in a group according to the type of venue where they most often use their loyalty program membership.

In addition to the PGSI, potential participants were screened for EGM playing and loyalty program membership. The following are examples of the screener questions asked:

- In the past month, have you gone to a casino, club or hotel and played electronic gaming machines, also referred to as “pokies”?
- Do you belong to a loyalty program at that [casino/hotel/club]?

A copy of the survey instrument is included in the Appendix.

5.2.2 Fieldwork

Participants for the discussion boards were recruited via referral to an online registration form. The following methods were used to direct participants to the form:

- Email distribution to a commercially available list of people who included “gambling/betting” and/or “attending clubs/pubs” as one of their leisure interests
- Email distribution to people who participated in our previously conducted alcohol research and agreed to be contacted about future research opportunities
- Posts and advertisements on Facebook
- Google advertisement
- Gumtree advertisement
- Advertisement via a gambling forum
- Invitations to current participants via email and/or SMS to refer people they know

Once registered, participants were contacted by phone and invited to participate in the relevant discussion board. They completed a series of screening questions to determine their eligibility and to assign them to the relevant board. Participants were offered a $50 gift voucher as thanks for their time and contribution. Fifty participants were recruited per board.

A discussion/topic guide was developed by the Social Research Group with input from two topic experts and approved by GRA. The guideline comprised a limited number of topics and sub-topic exploration prompts. A copy of the topic guide is included in the Appendix. Topics were informed by the audit and literature review as well as input from our topic experts. Approval of the final guideline by GRA was sought prior to programming the online discussion tool. The guide was programmed into GroupQuality's real time research software and checked for grammatical and logic errors prior to the boards opening.

Following recruitment, online discussion board participants were first sent an email introducing the purpose of the discussion and informing them of the basic features of the board. They were then sent a test link to the discussion board to ensure compatibility with the software and to allow them to log in and set up their profile. Participants could choose an "alias" and picture to add to their profile and be shown alongside comments. They were advised to choose an alias and picture that would maintain their privacy and ensure they could not be identified by other participants. On the morning the relevant discussion board opened, participants were provided with login details and a unique password. The opening email also advised participants of the topics to be posted each day. Each board was opened on a Monday, with four or five new discussion questions posted daily for one week.

Throughout the fieldwork period, participants were sent reminders via email and SMS. Participants received notification emails when new topics were posted on the board, when they received replies from the moderator or other participants to comments they had posted, and when they had not posted any comments for approximately 24 hours. After all topics had been posted, the board remained open for a further week to allow additional time for comments. Each participant, therefore, had two weeks during which they could post comments to their group and respond to other participants' comments. The six boards were conducted in April and May 2014.

5.2.3 Board composition

The six discussion boards consisted of EGM loyalty program members, grouped by:

- Type of venue at which a loyalty program membership was held:
    - casino
    - club
    - hotel/pub
- Level of risk as assessed by the Canadian PGSI (Ferris & Wynne 2001):
    - 0 = Non-problem gambler
    - 1-2 = Low level of problems with few or no identified negative consequences
    - 3-7 = Moderate level of problems leading to some negative consequences
    - 8 or more = Problem gambling with negative consequences and a possible loss of control

When a participant held loyalty program membership at more than one type of venue, they were assigned to the type of venue at which they most used their membership.

For the first board (Club), moderate-risk and problem gamblers were combined for the higher-risk group. However, it was then determined that the behaviours and attitudes of those categorised as “moderate risk” were often quite different from those of “problem gamblers” and more similar to lower risk gamblers. For the remaining five groups, therefore, moderate-risk gamblers were combined with low-risk and non-problem gamblers. This means that in the findings and analysis, “Club_High” includes both problem gamblers and moderate-risk gamblers, whereas “Casino_High” and “Pub/Hotel_High” include only problem gamblers. Similarly, “Club_Low” includes only non-problem and low-risk gamblers, whereas “Casino-Low” and “Pub/Hotel_Low” also include moderate-risk gamblers. Given the aims of the study, it was decided that it was more important to shift the composition of groups than maintain consistency.

The final composition of the six discussion boards is presented below.

Table 5.1: Discussion Board Recruits

Discussion Board	Details
Group One: Club Mod Risk/Problem Gamblers (Club_High)	Hold loyalty program membership at a club Moderate risk and problem gamblers Board opened: Monday 7 April 2014 36 people logged in and participated
Group Two: Casino Problem Gamblers (Casino_High)	Hold loyalty program membership at a casino Moderate risk and problem gamblers Board opened: Monday 5 May 2014 27 people logged in and participated
Group Three: Pubs/Hotels Problem Gamblers (Pub/Hotel_High)	Hold loyalty program membership at a pub/hotel Moderate risk and problem gamblers Board opened: Monday 5 May 2014 35 people logged in and participated
Group Four: Club Low Risk and Non-Problem Gamblers (Club_Low)	Hold loyalty program membership at a club Low risk and non-problem gamblers Board opened: Monday 5 May 2014 38 people logged in and participated
Group Five: Casino Low/Mod Risk and Non-Problem Gamblers (Casino_Low)	Hold loyalty program membership at a casino Low/moderate risk and non-problem gamblers Board opened: Monday 5 May 2014 29 people logged in and participated
Group Six: Pubs/Hotel Low/Mod Risk and Non-Problem Gamblers (Pubs/Hotel_Low)	Hold loyalty program membership at a pub/hotel Low/moderate risk and non-problem gamblers Board opened: Monday 5 May 2014 35 people logged in and participated

5.2.4 Participant demographics

The table below shows that participants included a mix of genders, ages and locations. Women made up a majority on four of the six boards. Men were a slight majority on both of the casino boards. Women were a large majority (64% of participants) on the Club_High board.

Participants on the Casino_High board were significantly younger than those on the other boards, with more than half of participants aged 34 years or younger. The Pub/Hotel_High board contained a relatively greater percentage of older participants, with more than half (57%) aged 55 or older.

Most participants were from New South Wales, Queensland and Victoria, with significant percentages of participants on the Pub/Hotels boards from South Australia. A very low percentage (6%) of Casino_Low participants were from New South Wales. In Western Australia, EGMs are located only in the casino.

Table 5.2: Demographics of participants

Base: All participants	Casino High (n=27)	Club High (n=50)	Pub/Hotel High (n=50)	Casino Low (n=36)	Club Low (n=33)	Pub/Hotel Low (n=29)
	%	%	%	%	%	%
GENDER						
Male	56	36	49	44	55	45
Female	44	64	51	56	45	55
AGE						
18-24 yrs	33	4	7	8	6	3
25-34 yrs	26	24	7	25	9	10
35-44 yrs	19	16	7	19	9	10
45-54 yrs	4	20	22	31	30	31
55-64 yrs	19	22	24	14	24	31
65+ yrs	0	14	33	3	15	14
STATE						
ACT	0	2	4	0	3	0
NSW	41	54	52	33	6	21
NT	4	0	0	0	0	0
QLD	19	26	28	19	6	34
SA	11	0	0	25	9	31
TAS	0	0	0	0	12	7
VIC	26	18	16	22	42	38
WA	0	0	0	0	21	0

Note: Totals may not add to 100 due to rounding & refusals

In their introductions, many of the participants described their main vocational activity. Of these people, the largest group was working full time (38%), followed by retired (20%) and home duties (11%).

Table 5.3: Main activity of participants

Base: All participants	Casino High (n=15)	Club High (n=26)	Pub/Hotel High (n=22)	Casino Low (n=21)	Club Low (n=20)	Pub/Hotel Low (n=23)	TOTAL (n=127)
	%	%	%	%	%	%	%
Work FT	40	23	55	48	25	39	38
Work PT	20	0	7	0	0	0	3
Casual FT/PT / Own business	0	12	0	5	0	9	5
Study FT	0	4	0	0	0	0	1
Study FT/PT + Work FT/PT	13	8	9	0	15	0	7
Home duties / carer	7	15	9	5	10	17	11
Unemployed	13	4	9	5	10	13	9
Retired	0	27	5	38	25	22	20
Pensioner	7	8	9	0	15	0	6

Note: Totals may not add to 100 due to rounding

5.3 Findings

Discussions from the boards were outputted into Excel with each comment on a separate line, identified by Participant ID. Discussions from each of the six boards were placed in separate Excel Workbooks. Comments were coded within Excel using a Grounded Theory approach (Charmaz, 2003).

The results of the online discussion boards are presented by theme. First, a summary of key findings regarding each theme is presented. This is followed by a more detailed discussion of the theme, including quotes from survey participants, identified by board (e.g. Casino_High; Pub/hotel_Low).

5.3.1 Venue

This first theme is around participants' choice of venue(s) – which venues they attend and why. It also presents results of a survey question asking whether the main reason they visit a venue is to play EGMs or for other reasons.

Choice of venue - summary

- Most participants had a favourite venue but also played EGMs at other venues.
- However, a minority said they do change venues during a single gambling occasion, usually based on whether they are winning or losing.
- Overall, most participants said convenience/distance is a major factor in choice of venue.
- The exception was the casinos, which were viewed by many as a destination for a special day or night out.
- The most commonly stated reason for preferring pubs/hotels or clubs was a friendlier, more familiar atmosphere.
- A major reason for preferring casinos was the greater excitement and choice of machines and other activities.
- 'Better loyalty program' was mentioned by multiple participants across different venue types.

Most participants had a favourite venue but also played EGMs at other venues

Most participants said they had one favourite venue where they spend most of their time, but also play EGMs at two or three other venues. However, they usually stay at one venue for any one gambling occasion rather than moving from venue to venue. This was true across all six boards. The Club_Low players mostly play at pubs/hotels and clubs and very rarely at the casino.

> *It's normally only one venue in a day/night [Club_High]*
>
> *The majority of the time I spend playing the pokies is at one venue at a time. I don't "pub hop"…. [Pub/Hotel_High]*
>
> *Whichever venue we go to we generally stick to that venue on that night. [Pub/Hotel_Low]*
>
> *I also never split my time between venues; I like to stay at the same one on a couple of games I like. [Casino_High]*

However, a minority said they do change venues during a single gambling occasion, usually based on whether they are winning or losing.

> *I start at the RSL for dinner at 1830 hrs and move to the Pokies approx 2000hrs. We have no set plan to change venues just as the night progresses we might be having a bad night or just bored and decide to move on. [Club_Low]*
>
> *It depends upon whether we are winning or losing. Lately we have been going to two pubs approx. 100 metres apart. When we have exhausted playing the cheap machines at one we walk down the road to the next. [Pub/Hotel_Low]*

Casino_Low participants in particular didn't seem to have particular venue, or type of venue, preference but were happy to play wherever.

> *Any pub, casino is fine with me, as I usually go with a bunch of mates. [Casino_Low]*
>
> *Whenever I am out and there's a pokies I'll play. This could be the RSL, club or local pub. The venue doesn't matter. [Casino_Low]*

Overall, most participants said convenience/distance is a major factor in choice of venue.

I play pokies at Clubs and Hotels but there is no real reason, it's the convenience and location of them that get me there. [Pub/Hotel_High]

We go to the local clubs as they are handy and you do not have to travel far. [Club_Low]

Predominantly local pokie venues just because of easy access [Pub/Hotel_Low]

I play locally at the pubs/hotels, 3 hotels within 1km from where I live… it's just ease of convenience [Casino_High]

Predominately play at casino. It is quite close. Casino_High – TOPIC 2

[I] don't necessarily prefer it over any other venues. We usually just go where it is closest to us at the time (SG0160) Pub/Hotel_Low – TOPIC 4

The exception was the casinos, which were viewed by many as a destination for a special day or night out (and where participants said they usually spend more money than they normally would).

I usually go once a week to local club with my mother; we also go to the casino on special occasions [Club_High]

Once every couple of years I will plan a trip to a casino. [Club_High]

The only time I prefer [casinos] is you have to go to the city, and you're all dressed up then I go and have a "visit", otherwise it's too far just to play machines. [Pub/Hotel_Low]

Reasons for venue-type preference

The most commonly stated reason for preferring pubs/hotels or clubs was a **friendlier, more familiar atmosphere**. A major reason for preferring casinos was the **greater excitement and choice of machines and other activities**.

Main reasons for preferring each type of venue are listed below, in descending order of number of mentions. Those in bold were mentioned considerably more often than the other reasons. It is interesting that for all three types of venues, **"better loyalty program" was mentioned by multiple participants.** Of course, this may have been in part due to the topic of the discussion board.

Table 5.4: Main reasons for preferring venues by type of venue

Casinos	Clubs	Pubs/Hotels
• **Greater variety/number of machines**	• **Friendly atmosphere – staff and other patrons**	• **Convenient/located close by**
• Greater variety of activities in addition to gambling, such as entertainment and choice of restaurants	• Comfortable and familiar staff and machines	• **Comfortable and familiar staff and machines**
• Better rewards / food and drink deals	• Good security; safer than pubs/hotels (women in particular mentioned this); keep out the drunks/riff-raff	• Small/cosy/intimate
• Better pay outs / bigger jackpots	• **Good loyalty program**	• Feel can gamble lots without getting questioned as at clubs
• **Better loyalty program benefits**	• Larger than pubs / more open spaces	• Casinos too far away / feel have to dress up
• Open 24 hrs	• More machines than pubs/hotels	• Easy parking
• Better/easier for smokers	• Less crowded than casinos	• **Loyalty program**
• In WA – only place to play pokies	• Don't have to go to bar for payout (as at pubs)	• Think wins are more likely/better
• Exciting atmosphere	• Quieter than casinos or hotels/pubs	• Less crowded
• Better customer service	• Convenience/closer to home (compared with casinos)	• Machines/amenities better than at local clubs
• An occasion / get dressed up	• More activities in addition to gambling as compared with hotels/pubs	• Like to stay local/ support local area
	• Cheaper/better food and drinks than pubs/hotels	
	• Better pay outs	
	• Community contribution/RSL	
	• Free bus/parking	

There was recognition by some participants that many of the advantages of casinos also make them more dangerous for problem gamblers.

I like that they're 24 hours and they have so many different machines but I also hate it if that makes sense? If it wasn't open around the clock I doubt I'd spend as much and also I tend to go "trance like" when I'm tired and just shovel money in. [Casino_High]

Main reason for visiting venue – summary

- Pokies were generally not the main reason participants visit the venue.
- However, problem gamblers were more likely to say that playing the pokies was a main reason to visit the venue.

Pokies were generally not the main reason participants visit the venue, although problem gamblers were more likely to say that playing the pokies was a main reason to visit the venue.

Problem gamblers were much more likely than lower risk participants to say that the only or main reason they visit the venue is to play EGMs, with approximately half of those in the casino and club groups saying this was the case (refer to the table below). Lower-risk gamblers tended to say that gambling was only part of the reason they attended the venue and that they mainly attended for other reasons.

Table 5.5: EGM as an attraction to the venue

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
When you visit a club, are the pokies…	%	%	%	%	%
The only/main reason you visit	19	52	21	17	45
One of the reasons/not the reason you visit	81	43	79	81	55
Don't know/NA	0	4	0	3	0

Note: Total may not add to 100 due to rounding

Below are some comments from **non-problem gamblers**.

> *Main reason is for the food and night out the machines just happen to be part of the experience. [Club_Low]*
>
> *I visit hotels for a feed or to listen to bands or DJs but most of the time I'll put a few dollars through the pokies. [Pub/Hotel_Low]*
>
> *The main reason we visit is for the meals and sometimes the offers which come by mail; pokies is secondary but sometimes worthwhile if you get my drift. [Casino_Low]*

These compare with the following typical remarks from **problem gamblers**:

> *I visit the clubs 90% of the time purely for the pokies/keno... [Club_High]*
>
> *Very rarely I will try to kid myself that I am there for a meal or friends. Face it though, if you want a nice meal a club is not the first place you think of [Club_High]*
>
> *I like the restaurant at the Casino but going to the Casino without playing the pokies is like going to a Butcher's shop & not buying any meat! [Casino_High]*
>
> *If by myself I'll go purely to play. If with a group may eat first but will go and play after. Sometimes I've left but went back to play. [Pub/Hotel_High]*

5.3.2 Gambling/EGMs

This section of findings reports on participants' self-reported gambling behaviours. This includes when and how often they usually gamble and whether they have a regular pattern of gambling. It also includes discussions on several topics about gambling behaviours not specifically asked about but brought up by participants at various points in the discussion. These include gambling in order to lift their mood, perceived connections between alcohol consumption and gambling behaviours, and fallacious thinking around EGMs.

Gambling patterns - summary

- Most participants had usual days/times when they visited the venue/gambled, although lower-risk gamblers were more likely to have a regular pattern as compared with problem gamblers.
- In addition, many participants said they gambled 'when the mood struck' or they had some extra money on hand.
- A significant minority, however, claimed to have no set pattern.
- How long participants stayed at the venue was determined by money, not time.
- Problem gamblers generally spent more money and were less able to adhere to pre-set limits.

Most participants had usual days/times when they visited the venue/gambled, although lower-risk gamblers were more likely to have a regular pattern as compared with problem gamblers.

I normally play during the day when the kids are at school if I've got the day off or every 2nd weekend when the kids are at their dad's. [Pub/Hotel_Low]

I play bowls Tuesday and Friday afternoon and play after the game. On Saturdays I go to the RSL for the midday raffle and play pokies until I go into the tab at about 3 o'clock. I also go to the RSL (the club with the rewards) on at least 2 other days of the week when the mood gets me. (Club_High)

Usually a weekend either a Friday or Saturday night. Club_Low TOPIC 16

In addition, many also went 'when the mood struck' or they had some extra money on hand.

I usually play on Saturday afternoons and sporadically during the week on different evenings from about 6pm - 8pm. The factors which influence me playing the pokies are my general mood & when I get paid. [Casino_High]

Usually play on Wednesday nights, between 6.30 and 8.30, occasionally a bit later depending on finances. [Club_Low]

Usually over the week-ends or when I'm bored and have a bit of money to spend. [Casino_High]

A significant minority, however, claimed to have no set pattern.

I have no set day or time I play the machines. If I feel like killing an hour or so and I can afford to lose the money I will go and play. [Pub/Hotel_Low]

I usually just play whenever I am out with friends or whenever the urge strikes.... [Casino_Low]

For me it is just a spur of the moment thing. No particular time or day for me. [Casino_High]

Any day or time now that I've retired. I tend to go whenever I can sneak away or not be missed. [Club_High]

How long participants stayed at the venue was determined by money, not time.

Length of stay was overwhelmingly determined by money, whether that was a limit they determined in advance or amount of money on hand or available to them. Very few participants said length of stay was based at all on time.

> *As for how long I play depends on how quick I run out of money. I usually take a few hundred dollars with me and leave my EFTPOS card at home so I don't spend too much. [Club_High]*

> *[I play] for maybe an hour at the most unless of course the machine is being kind and giving back. [Club_Low]*

> *These days I go in with a set amount so it can last for 15mins or 15 hours depending on how they pay [Casino_High]*

> *I don't play pokies on a time basis. It is not a hobby to pass time. It is either a matter of get a cheque and go home or spend every cent I have and Go home [Casino_High]*

> *I always set a limit and leave when it's gone. [Pub/Hotel_Low]*

Problem gamblers generally spent more money and were less able to adhere to pre-set limits.

In general, problem gamblers spent more money and were less able to stick with any pre-set limits as compared with lower risk gamblers. They often talked about spending amounts of $100 to $200 per gambling occasions whereas for the lower risk gamblers this amount was often more $20 to $50.

> *I prefer to play when I can go in with at least $100-200, and if it lasts me 8+ hours, then I'm reasonably happy. [Pub/Hotel_High]*

Below are comments from problem gamblers around setting limits and attempting to adhere to them:

> *I go with good intentions of only spending a certain amount but almost always end up spending more. [Casino_High]*

> *Try hard to keep to a certain amount but can go over if I have the time. [Pub/Hotel_High]*
> *Wanted to leave after the first payout...about 20 minutes into the session… but didn't. Ended up staying for 4 hours till I reached my limit at the ATM. [Pub/Hotel_High]*

Gambling and mood - summary

- A number of problem gamblers said they often played EGMs to lift their mood or escape from problems or worries.

Unprompted, a number of problem gambling participants said that they often played EGMs in order to lift their mood or escape from problems or worries.

> *Depending on whom I go with & what my mood is & how well the machines are paying. If I had a lot on my mind & wanted to stop thinking, I could play the pokies for hours non-stop. If I'm with friends I tend to play less. [Club_High]*
>
> *It is usually when I am feeling a bit flat that I go or when I have bills coming up and I think I might win enough to pay the bill. Usually I spend more than the bill is worth and lose so I am further behind! [Casino_High]*
>
> *If I go to the pub on Saturday afternoons I will play the pokies cause I get social anxiety & feel depressed around strangers at the pub so retreat to the pokies area. [Casino_High]*

Gambling and alcohol - summary

- Several problem gamblers said alcohol affects their gambling behaviours

Also unprompted were several comments from problem gamblers regarding connections they have noticed between their alcohol consumption and gambling behaviours.

When asked what determines how long they spend gambling:

> *Usually of an evening. Sometimes really late. Alcohol can affect how much I play. [Casino_High]*
>
> *The main factor influencing how often I play is when left to drink alone. [Pub/Hotel_High]*

Fallacious thinking around machines - summary

- Both problem gamblers and lower risk gamblers believed there are lucky and unlucky machines and that machines go on winning or losing streaks
- In some cases participants were aware that this thinking was incorrect and in other cases they were not.

In discussing choice of venue or type of venue, or how long the usually spent gambling and influences on amount of time, a number of participants expressed fallacious thinking around the EGMs – for example, that there are lucky and unlucky machines, or that the machines go on winning or losing streaks. In some cases participants were aware that this thinking was likely incorrect and in other cases they were not.

[I] like to change to a different venue each time as it may change my luck. [I] prefer to only play machines I am familiar with. [Pub/Hotel_Low]

My choice of venues is influenced by what machines they have (because, let's face it, we all have "favourite" machines)…. And I seem to be "luckier" in some venues, and on some machines (LOL). [Club_Low]

I like the idea that a few people have played before me so the chances of winning can be greater, especially the jackpots on certain machines. [Club_High]

I avoid hotels with a small number [of machines], e.g. 10-15, as I think I won't win there! [Pub/Hotel_High]

I try and gauge when the machines might be paying out..had some luck on a Sunday afternoon...almost every machine I played paid well....so, of course, tried the next few Sundays. Don't usually go back to a venue right after a big jackpot has gone off as I think the machines are filling up. Have tried some early mornings hoping that the machines might be flush from the night before. [Pub/Hotel_High]

5.3.3 Gambling loyalty programs – membership

This next section discusses various issues around loyalty program membership – how long participants have been members; why they joined the LP; how they found out about it; how they actually signed up; and whether they compared loyalty programs before joining.

Length of membership - summary

- Club members tended to have been loyalty program members longer than pub/hotel or casino members.
- Problem gamblers tended to have been LP members for LESS time than lower-risk gamblers
- Lower risk casino participants provided the greatest variety of reasons for joining.
- None of the Club_Low participants mentioned getting points for gambling as a reason for joining the LP.

Club members tended to have been loyalty program members longer than pub/hotel or casino members.

Of those participants who responded to the question about how long they had been a loyalty program member at their respective casino, club, or pub/hotel, club members on average had held their membership the longest – 10.8 years on average, versus 7.0 and 7.8 years for casino members and pub/hotel members, respectively. This result may be due to the fact that general club membership often automatically included membership to the gambling loyalty program.

Participants who were loyalty program members at more than one venue were asked about the venue where they had been a member the longest. For example, if a participant in the pub/hotel discussion group held loyalty program memberships at two pubs/hotels, two clubs, and one casino, they were asked to discuss whichever pub/hotel they had held membership the longest.

Average length of membership by venue type:

- Casino: 7.0 years
- **Club: 10.8 years**
- Pub/Hotel: 7.8 years

Problem gamblers tended to have been LP members for LESS time than lower-risk gamblers

Participants who reported a PGSI score that places them in the low or moderate risk categories had generally held their loyalty program membership longer (10.1 years on average) than those categorised as problem gamblers (6.9 years). This outcome may be explained in part by the fact that younger people tend to have higher PGSI scores.

Average length of membership by level of gambling risk: **Problem gamblers: 6.9 years; Lower-risk gamblers: 10.1 years**

Reasons for joining loyalty program - summary

- Club members often joined the loyalty program because it came automatically with their general club membership; other participants provided a variety of reasons for joining the LP.
- None of the Club_Low participants mentioned getting points for gambling as a reason for joining the LP.
- Pub/Hotel_High participants said they were clearly encouraged and expected to join the loyalty program.
- A number of the Pub/Hotel participants said they were told that anyone who lived within a certain distance of the pub or hotel had to join the loyalty program if they wanted to gamble.

Club members often joined the loyalty program because it came automatically with their general club membership; other participants provided a variety of reasons for joining the LP.

Club participants were overwhelmingly likely to say the loyalty program membership came automatically along with their membership to the club.

> *In all cases the programs came automatically with new membership of the club so this really was a non-issue. [Club_Low]*

> *As a club member you automatically become a member. I joined the club for a number of reasons including social activities and other special days. I have a lot of loyalty cards from restaurants to shopping but I prefer my club one above all. [Club_Low]*

None of the Club_Low participants mentioned getting points for gambling as a reason for joining the LP.

It appeared that most of these participants were not particularly interested in the LP; it simply came along with the club membership.

Pub/Hotel_High participants said they were clearly encouraged and expected to join the loyalty program.

Many of these participants did not know anything about the loyalty program prior to being approached by staff. Staff often filled out all of the forms for them. Since membership was free, most participants said they thought they might as well go ahead and join. A number of these participants clearly felt they should 'get something back for all the money I spend' and wanted points for more pokies.

> *I joined because I was encouraged to by the staff at the gaming lounges. I didn't know anything about them prior to that. The staff had the forms to fill out and did everything for you so it was no hassle to join and there were rewards promised for points accrued and, as I was spending so much money there, it seemed like a good idea to try and get something in return. [Pub/Hotel_High]*

A number of the Pub/Hotel participants said that they joined the loyalty program because they were told that anyone who lived within a certain distance of the pub or hotel had to join the loyalty program if they wanted to gamble.

> *I found out about it [requirement to join] when I entered the hotel and they asked where I lived. The program did not cost anything so it was a "no-brainer" to join. [Pub/Hotel_Low]*

> *I probably had to join up as I lived within a certain distance of the hotel. [Pub/Hotel_High]*

> *[Said] if lived close needed to join. [Pub/Hotel]*

The top five reasons on each board for joining the LP are presented below, in descending order of frequency of mention. Those in bold indicate that a large percentage of participants provided this reason.

Table 5.6: Top five reasons for joining LP by venue and gambler type

Casinos		Clubs		Pubs/Hotels	
High	**Low**	**High**	**Low**	**High**	**Low**
Points/free bets upon joining	Discounts on meals/drinks	**Comes free with membership**	**Comes free with membership**	**Points**	Was offered/suggested by staff
Free/ discounted/ closer parking	Points/money for gambling / free play	"Free stuff" in general	Discounts on meals/drinks	Rewards in general/"get something back"	free stuff/benefits/rewards
Cheaper meals/drinks	Free/ discounted parking	Points for gambling	Free stuff/rewards in general	Because free	Prizes/prize draws/raffle
Free stuff in general	Free to join	Discounts on meals/drinks		Cash	Because free
Required if live close by / to play in poker comps	Free stuff in general			Required if live close by	Came with membership

How found out about loyalty program - summary

- Club participants mostly only found out about the LP once they had joined the club.
- Pub/hotel and casino participants were often approached by staff about joining.
- Casino participants sometime saw advertising in the venue.

Club participants mostly only found out about the LP once they had joined the club; pub/hotel and casino participants were often approached by staff about joining; Casino participants sometime saw advertising in the venue

Although asked, few participants specified how they found out about the loyalty program. Many club participants said the loyalty program was an automatic part of their club membership and only found out about it once they had joined the club.

Casino and Pub/Hotel participants who discussed this issue mentioned a variety of ways they found out about the loyalty program. The most common were signs or other advertising at the venue (mentioned mostly by casino LPMs) and staff at the venue approaching them and telling them about the LP. Below are the most frequently mentioned reasons given, with those in bold particularly common.

- **Signs/advertising in the venue (mostly casinos)**
- **Staff approached them**
- Word of mouth / friend
- Required if lived nearby (pubs/hotels)

I probably had to join up as I lived within a certain distance of the hotel. I found out about it when I entered the hotel and they asked where I lived. [Pub/Hotel_Low]

How joined loyalty program - summary

- Club participants were signed up automatically when they joined the club.
- Pub/hotel and casino participants usually filled out forms at the venue.

Most casino and pub/hotel participants appear to have signed up at the venue.

Few participants discussed how they signed up. Of those who did, club participants said they were signed up to the LP automatically as part of their general club membership. Casino and pub/hotel participants who answered this question overwhelmingly said they filled out forms at the venue.

On the way out I enquired about membership. I was signed up on the spot and got a card straight away. [Casino_High]

Comparing loyalty programs - summary

- Participants did not compare loyalty programs before they joined.
- Reasons for not comparing included that they are free so they may as well join all of them and they see little difference among different LPs.

Participants did not compare loyalty programs before they joined.

Unlike findings from the U.S. literature that gamblers often compared programs to get the best deal, none of the participants in the discussion boards who answered this question compared loyalty programs prior to joining. Indeed, they seemed surprised by the question.

Reasons for not comparing included:

- LPs were free so they might as well join all of them
- They do not see much difference among the various LPs
- They only go to the one venue
- They don’t choose where to play based on the loyalty program
- No other close-by venues have LPs

5.3.4 Gambling loyalty programs – the program

This section discusses the specifics of participants' loyalty programs, including how they accumulate points, types of rewards including both tangential and non-tangential rewards, whether their program has tiers, and whether they received points or rewards immediately upon joining the LP.

How the program works - summary

- Most LPs involved a membership card that one swiped at the machines and sometimes upon entry and when purchasing drinks and meals.
- Clubs generally offered the most options regarding how one could accumulate points.
- Several participants mentioned that they did not really understand how their LP worked.

Most LPs involved a membership card that one swiped at the machines and sometimes upon entry and when purchasing drinks and meals.

Almost all of the loyalty programs discussed involved accumulating credits or points on a card based on how much money one spent – on the pokies or other gambling products, and also sometimes on meals, drinks etc. Many programs also involved swiping one's membership card upon entry to the venue, thus receiving points for each visit. In some cases, this also allowed one to enter prize draws.

> *Points are accumulated on your Members Card which is inserted in the poker machine you are playing. The more you pump the machine, the more points you accumulate, which sounds like a win for the club, and a loss for the player. Once you have reached a certain amount of points, you insert your ULTIM8 card into one of the several Transfer Kiosks scattered around the club, enter your security info, and the dollar value is added to your Eftpos card. [Casino_High]*

> *[The points] accumulate depending how much I spend and or time spent in the actual gaming area [Casino_Low]*

> *The other thing the local clubs do is on a specific night every week they have a prizes for people playing the pokies. Tickets are won by having members card in the pokies as you are playing them. Names are pulled out of a barrel; you then go up and get two chances on a pokie style machine that if you line up 3 diamonds you get to pick a prize from the prize pool, i.e. toaster, breville, perfumes , soaps towels .... prizes like that [Club_High]*

With some LPs, one receives points for gambling but discounts rather than points for things like drinks and meals.

> *I get an automatic discount on all meals just by being a member [Club_Low]*

Clubs generally offered the most options regarding how one could accumulate points.

Club LPs seemed to offer more options regarding how to accumulate points (i.e. not only from gambling), including in some cases the ability to receive points from activities outside of the venue (e.g. at the local golf club). One club participant said you could pay the loyalty program membership fee with points. At the casino gaming tables, points often accumulated based on time spent at the table as well as money spent.

The following is an unusual type of LP in which one does not accumulate points with a card:

> *My loyalty program has no points, cards or any other besides, information sent out to me, they do however give us money in exchange of any notes we exchange for coins, we have a set of 4 coupons to collect weekly for 4 weeks straight, I guess it's to make us go there even more but regular customers are not able to collect, you have to be a member. [Pub/hotel_High]*

Several participants mentioned that they did not really understand how their LP worked.

Unprompted, a number of participants admitted they didn't understand the point system and exactly how much time or money you had to spend for how many points.

> *All cards accumulate points based on how much you spend but I can't remember dollar value to points. [Casino_Low]*

> *The more you spend the more you get. I haven't studied the nitty gritty of the program. [Casino_Low]*

The following is from one of the few participants who had attempted to work out how much one needed to spend to accrue how many points:

> *I think I did a rough calculation and worked out that I have to play about $200 through the meter to accrue 50 points/$5 credit. [Pub/hotel_High]*

Whether the LP has tiers – summary

- Casino LPs almost always had tiers but club and pub/hotel LPs usually did not.
- One could generally be demoted a tier if spending was not maintained at a certain level and within a certain period of time

Casino LPs almost always had tiers but club and pub/hotel LPs usually did not.

Almost all casino participants said their loyalty program had tiers, whereas tiers were much less common in the club programs and almost non-existent in the pub/hotel programs.

Of participants who answered the question, the following percentages said their LP has tiers:

- **Casinos: 95%**
- Clubs: 32%
- Pub/hotels: 10%

Most programs with tiers require that one continue to accrue points at a particular rate or level to avoid being demoted to a lower tier, and point accumulation often had time limits (e.g. only counted for a certain period of time towards your tier level).

> *Each three months you have to earn 25 points to retain your membership level [Casino_Low]*
>
> *If you don't sustain that amount of spending for 3 months you drop back, all points expire in October and then you have to start again [Casino_High]*
>
> *Points get reset every three months. So you have to spend a lot in a short period of time and consistently. [Casino_High]*

Rewards - summary

- Participants preferred rewards they could use; in particular free/discounted parking and meals and drinks
- A majority of participants said they did not value very highly the rewards they receive.
- Lower-risk casino participants were the most enthusiastic about the rewards, and lower-risk club participants, the least.
- Problem gambler participants in particular often realised that the rewards they receive from their LP are worth far less than the money they spend on gambling.

Participants not surprisingly liked most the rewards they could use; in particular they mentioned free or discounted parking and discounted meals/drinks as rewards they particularly valued

When I do go I do use my cards I will often go to a club for a meal and not play if they offer meal discounts. [Club_Low]

Loyalty programs are great for meals, drinks and entertainment. [Club_Low]

Several participants discussed their dislike of prize draws because they required one to actually be at the venue to collect the prize.

I find the member's draws the least valuable, as I am rarely in the club when they are drawn, as I work nights. [Club_High]

At one pub/hotel the reward for point accumulation was cash.

Clubs generally offered a wider variety of rewards and rewards located outside the venue. For example, fuel and supermarket vouchers were quite popular.

A majority of participants said they did not value very highly the rewards they receive.

Club_Low participants in particularly did not rate the rewards they received from their LP very highly, with almost three-quarters (72%) saying the rewards were not very or not at all valuable. This is in contrast to **lower-risk casino participants**, 61% of whom said they were either very or quite valuable.

Pub/Hotel participants were the most interesting – they reported average levels of how highly they value the rewards from their LP yet it appears pub/hotel LPs offer the least to their members. This result may be explained by the particular affinity and loyalty many pub/hotel members (as well as club members) express towards the venue.

Table 5.7: How much value LP rewards

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino_ High (n=20)
How much do you value the rewards you receive from your loyalty program?	%	%	%	%	%
Very/quite valuable	34	43	26	61	40
Not very/not at all valuable	59	57	72	36	60
Don't know/NA	6	0	3	3	0

Note: Total may not add to 100 due to rounding

Problem gambler participants in particular often realised that the rewards they receive from their LP are worth far less than the money they spend on gambling.

Unprompted, several participants mentioned that they felt the LPs were “a bit of a scam”, with the amount of money put in worth much more than the rewards.

> *When you work out just how much you have to spend/turnover on pokie machines, the vouchers are really not that great a reward, but they fool us into thinking we're getting something back. A few years ago, a lot of pubs had a "prize cabinet", where you could swap your points for items that appealed to you. But you always seemed to need an enormous amount of point for even the tiniest or least useful item. [Pub/hotel_High]*

> *I don't like the casino dollars reward system cause it's based on the more money you spend so it's really not beneficial in the long run cause you are still just wasting your money. [Casino_High]*

> *It's just a gimmick to make us the "gamblers" believe we are getting something in return -- whether it be a "win" on the pokies or the points slowly going up [Pub/hotel_High]*

These promotions annoy me. It would be nice to be able to win something without having to go back on another night & spend more money in the hope of winning the big prize [Club_High]

Participants were asked if, in addition to tangible rewards such as points and merchandise, they received other, non-tangible rewards from their loyalty program membership, such as special treatment by staff.

Non-tangential rewards (i.e. special treatment) – summary

- Club and pub/hotel participants generally did not feel that members were treated better than non-members.
- Some felt any difference was due to being a 'regular' or not, or perhaps a heavier gambler.
- Casino participants discussed different treatment based on tier level or 'high-rollers' vs. others

Club and pub/hotel participants generally did not feel that members were treated better than non-members.

I find there is no difference. If the staff like you, they tend to treat you better, member or not. [Club_High]

Yes I do think it is better to be a member as you get cheaper food and drinks and have use of the courtesy bus and you don't have to sign into the club [but service isn't any different]. [Club_High]

Several of these participants felt any difference in treatment was due to being a "regular" or not, or perhaps being a heavier gambler.

The only difference in service I have noticed is that regular players get to know the staff and therefore might get given free drinks but I don't think that is dependent on being a loyalty program member, just a regular attender at the venue. [Pub/hotel_High]

I notice the big gamblers do get waited on more than the average punter say but as to members vs non-members I don't see any difference [Club_High]

Casino participants, however, tended to notice both better rewards and better service, often based more on tier level or whether one was a "high-roller" or not, rather than whether one was a LP member or not.

> *The higher the level the better the service but you have to spend a heap to move up levels. [Casino_Low]*
>
> *They get access to special areas of the casino, access to special offers, and I think they get priority positions for bookings and stuff. [Casino_Low]*

The following participant at first said he saw no difference, but then mentioned a difference:

> *No I don't see any difference in treatment and would not know how the high rollers get treated…. People with higher cards at the casino seem to be able to jump the queue for meals etc.... [Casino_Low]*

Whether got rewards immediately upon joining the LP - summary

- Most casino participants said they received immediate rewards.
- Fewer pub/hotel and club LPs offered immediate rewards.

A majority of casino participants said they received rewards upon signing, but lower percentages of pub/hotel and club participants said they received immediate rewards

Percentage of participants who answered the question who said they received rewards immediately upon joining the LP:

- **Casinos: 70%**
- Clubs: 33% (10% didn't know)
- Pub/hotels: 43% (one person didn't know)

These rewards were mostly points (casino and pub/hotel participants) or other small rewards (clubs – e.g. a free beer).

5.3.5 Gambling loyalty programs - promotion and communication

The following section discusses how and the extent to which the loyalty programs were promoted, included on venue websites, and whether the venues regularly communicated with members regarding the LP. Also included is a discussion of promotion of responsible gambling messages by the venue.

Communications regarding LP - summary

- LP communications ranged widely from non-existent to extensive.
- Casinos provide the most communications.
- Clubs provide a lot of information at the venue and via regular newsletters.
- Pubs/hotels mostly communicate in person (by staff with patrons at the venue)
- Much of the ongoing communications are sent via regular mail.
- Most people across venues seemed annoyed they don't receive more communications. Few felt they received too much communication from venues.

Participants said that information provided at the venue regarding the loyalty program and on-going communications regarding the loyalty program ranged from non-existent to extensive.

Casinos seemed to provide the most communications. Clubs provided a lot of the information at the venue. Much of the information is sent out via regular mail but rarely via text messages. Newsletters are popular at the clubs and vouchers are common at the pubs/hotels, although all venues provide many of the same types of communications.

Some participants insisted that no or very little information was available about the loyalty program.

> *I can't recall any information at the venue at all. [Pub/hotel_Low]*
>
> *All I see is points accumulate on the pokie machine... no information is displayed about how the loyalty program works and it is kept mysterious and elusive so I feel manipulated and exploited. [Casino_High]*
>
> *I've never seen any information at the club for my rewards membership and can't recall being given any when I joined the club. As for me I've just learnt how to use it myself. [Club_High]*
>
> *VERY little information about exactly how the points are accrued or what the rewards actually are. When I checked the Club's website earlier this week to get information I found that there is nothing on the web only that there is a brochure available from the club. The person giving the information is the staff member doing the membership. I don't even think they say anything if you are renewing, you only get info if you are joining. [Club_Low]*

One participant who hadn't previously noticed any information realised there was once he looked.

> *[I] never really noticed until I started this discussion. I've now noticed signs on the wall or the machines outlining the next big promo & how to enter. [Club_Low]*

This reported lack of communications by some participants contrasted with other participants who provided a long list of ways the venue communicates about its LP. These included:

- booklets/leaflets/pamphlets/posters/noticeboards
- ask the staff/staff tell you about it
- info packet when sign up
- kiosks/computer stations
- newsletters/letter/email/text messages
- Info desks (casinos)/ service desk dedicated to LP/customer service desks
- promoted over PA system
- when insert card
- specific TV channel (casinos)
- website
- advertisements at restaurant/when buy food or drinks
- local newspaper

> *There are usually poster and signs advising of awards and competitions around the club, and a swipe machine for members to enter. I also get a monthly newsletter by email. [Club_High]*

> *There is a regular newsletter that outlines club activities including rewards updates and the terminal in the foyer where I can check my points. There is also a staff member on hand at all times to help with any questions that might arise. [Club_High]*

Several participants who belong to LPs at both casinos and pubs/hotels reported seeing much more advertising of the LP at casinos as compared with the pub/hotel.

> *There is absolutely no information at the local pub about any loyalty program; I don't think the staff really care about it one way or the other. The casino is a different story; there are booths and people all over the place giving out information. [Pub/hotel_Low]*

> *Limited information regarding the loyalty program is provided at the **hotel** venue and I had to ask staff members about particular aspects of the program. I'm still finding out about benefits through staff members letting me know now and I've been a part of the program for at least a year now. Information is not freely provided other than a couple of signs around the venue with the name of the program. They rely on the staff to join people up and inform patrons of what's involved. The loyalty program at the **casino** I'm apart of is much better regarding information provided. There is information provided on the website, they have staff members walking around the facility signing people up and informing them of how it works as well as flyers and brochures that are handed out to help patrons understand how in fact the loyalty program works.*

Amount of on-going communication regarding the LP also appears to vary widely – from none at all to one a week or more.

For example, compare the two responses below, each by problem gamblers who are members of club LPs:

> *I receive nothing via email, text or phone from the two I'm a member of. I think I would need to seek out the information myself if I wanted it. [Club_PG]*

> *There is a monthly newsletter showing all the activities and promotions mailed to members. Included in the booklet is a list of the reward levels which indicates the benefits available to each level. Each month there is an email advising activities at the club. Twice each year there is a posted notification advising the member's assessed level in the loyalty program for the next six months. Intermittent notifications of promotions are sent out at random times during the year. [Club_PG]*

Most of the ongoing communication appears to be via regular mail. Almost no participants mentioned SMS messages.

> *A Bi-Monthly news magazine is mailed to all members which contains news on up and coming events, current promotions and a small section on the ULTIM8 rewards program. [Casino_ High]*

> *[I] get information about what is happening and what is going on in the post. [Casino_Low]*

Most people across venues seemed annoyed they don't receive more communications. Few felt they received too many communications.

> *I got a card and a brochure and a quick rundown on how it works. Since then I am lucky to receive something by mail quarterly and a letter every February for my birthday*

The following participant wished the LP program were more similar to a LP like FlyBuys:

> *But compare that to say Fly Buys, I get a regular newsletter telling me my balance, suggestions on what I can redeem my current points balance for and ways to increase my points buying certain products or services.*

Regarding ongoing communication about the loyalty program, it appears casinos do this most; clubs tend to send out monthly newsletters; pubs/hotels mostly seem to communication in person/verbally when staff speak with patrons.

> *I received verbal information about the basics of the loyalty program and on subsequent visits found out more and more benefits of the program. No flyers were provided, limited information available and a very pointless website. The staff members at the venue have been terrific in letting me know how things work and what I can get discounts on etc. [Pub/hotel_ High]*

Account information - summary

- Most LPs provide information on points accumulated but few provide information on money or time spent gambling.
- Where this information was available, it was generally up to the patron to access it, rather than being automatically provided.
- Several of the problem gamblers said they did not want to know how much money or time they spent gambling and a few said they would be very unhappy if they knew the venue knew how much they spent.
- Some participants did not believe that the venue kept track of such information.
- Others, however, said being provided with information on money and/or time spent, both per occasional and, particularly, cumulatively, would be helpful in assisting them to regulate their gambling behaviour.

Most LPs provide information on points accumulated but few provide information on money or time spent gambling.

The computer system at [XXX casino] tells you how many points you have made for the day and differentiates between food and pokie points. But only on that day. You can print out an activity statement which tells you how much you have lost or won. However it is confusing and I doubt its accuracy. [Casino_ High]

I have never seen a report on expenditure on the card and I am not sure if there is such a report available. [Club_ High]

The card has points balance each time you enter club or put in pokie machine. Nothing else. Have to monitor myself on what I am spending. [Club_Low]

Not one program in which I have been involved has monitored my turnover and if they have then that information has not been made available to me. I firmly believe it should be. The only information accessible to the players in programs is the points earned by the turnover. [Pub/hotel_ High]

They have an automated machine where you can just hold your card against it to sign in as you arrive. This machine also gives you a balance of your points, but it doesn't tell me what I have spent. [Club_ High]

Where this information was available, it was generally up to the patron to access it, rather than being automatically provided.

> *You can ask the club to inform you how much you have spent at the club, be it via - Pokie usage Food or Drink purchases This is an unknown fact and there is paperwork to be filled in to request this information. [Pub/hotel_Low]*
>
> *I can request a printout of what I've spent, otherwise it's up to me to remember how much I've spent. [Club_Low]*
>
> *There is a few machines around the casino where you swipe your card and it gives you info on how much spent and rewards earned etc. [Casino_Low]*

Only one participant said they automatically received this kind of information.

> *I get an annual statement that tells me how much I have spent (which is usually quite a confronting experience I can tell you). [Pub/hotel_ High]*

Several of the problem gamblers said they did not want to know how much money or time they spent gambling.

> *If you wanted to know your history on the account, winnings, spending etc., this is available on your account when logged in. No, I try not to make myself hate me more for losing so much. [Casino_ High]*
>
> *I have never received a statement and I don't know if I can request it. Quite frankly I'm not sure I want to know. [Club_ High]*
>
> *I have no interest in being told how much I have spent on the pokies. [Club_PG]*

Some participants did not believe that the venue kept track of such information.

> *I am not aware that the club would monitor each member's spending. [Club_PG]*
>
> *I also don't think I'd like to know my spending habits nor would I want others to know; I'd hope the club wouldn't keep track of my spending without my knowledge and that they only kept a record of points earned without a record of how.*

Others, however, said being provided with information on money and/or time spent, both per occasional and, particularly, cumulatively, would be helpful in assisting them to regulate their gambling behaviour.

I do not monitor my turnover on poker machines and I am confident that should that information be available to me then I would reduce my exposure to such losses. [Pub/hotel_ High]

I think it would be good if the programs did in fact include a visual notification of exactly how much real money you have spent, it might just be enough to shock some people enough to cut back or cut out their pokie activities - but I guess that is exactly why you don't see that information. [Pub/hotel_ High]

Responsible gambling messages - summary

- Participants were aware of responsible gambling messages and stated they were visible throughout the venue.
- Some participants felt such messages are merely a token gesture by the venue.
- Other participants believe that such messages will have little impact because problem gamblers have to be ready to change. This sentiment was expressed by both problem and non-problem gamblers.

Almost all discussion board participants were aware of responsible gambling messages (RGMs) at the venue. Many reported that such information was visible all over venue – in the toilets and on posters and machines. Most were sceptical that they have much impact. Some stated that such messages were merely a token gesture by the venue. Others believed that people have to be ready to change, a view ascribed to by some of the problem gamblers.

Participants were aware of responsible gambling messages and stated they were visible throughout the venue.

> *There is always info everywhere; it's in reception, a poster on top of the ATM, in the toilets, at the cashier, everywhere you look it's there. [Casino_ High]*

> *I can clearly recall posters within the venue in various places and notices on poker machines. [Pub/hotel_Low]*

> *There was mention of responsible gambling on the pamphlet about the loyalty program. The venue I attend has notices regarding responsible gambling at the cashier booth and the toilet doors and scattered on the wall in a few places. [Pub/hotel_Low]*

Some participants felt such messages are merely a token gesture by the venue.

> *I can't remember if it was stated in the info pack. There are messages in the Rest Rooms but usually in small writing which appears to be a token gesture. [Casino_ High]*

One participant suggested an alternative:

> *I would rather see an independent support person located in every club, for as long as the club is open, who will communicate, refer, support anyone, wishing to stop playing pokies. The expense of which could easily be afforded by the club from gaming revenue. I think the demand would be enormous. [Club_ High]*

Other participants believe that such messages will have little impact because problem gamblers have to be ready to change. This sentiment was expressed by both problem and non-problem gamblers.

> *I would be extremely reluctant to seek help, even though I believe I am potentially addictive to gambling. I must also admit that even if I am not prepared to admit that I have a problem, I would benefit from some guidance. [Pub/hotel_ High]*

> *I didn't read it too closely - that would be admitting it applied to me. [Club_ High]*

Role of venue website in promoting LP - summary

- Most board participants either thought the venue did not have a website with information about the LP or were unsure.
- A majority of casino participants, however, either said it did or assumed it did, as did a majority of problem gambler club participants.
- Most participants who had been to the venue website said the website contained little information about the LP.

Most participants did not know whether the venue had a website with information about the LP but casino participants in particular assumed it did. Few had looked at the website and those who did mainly did so to see about upcoming events or entertainment. Almost none went on the website to search for information regarding the LP.

Most board participants either thought the venue did not have a website with information about the LP or were unsure. A majority of casino participants, however, either said it did or assumed it did, as did a majority of problem gambler club participants.

Casino participants were most likely to say that the casino had a website that included information about the LP; in addition, one in five casino problem gambler participants thought it probably did. About half of club participants replied in the affirmative. Just one-quarter of pub/hotel participants said the venue had a website with loyalty program information, with approximately two-thirds unsure.

Table 5.8: Knowledge of LP on venue websites

	Website HAS info on LP	Website has NO info on LP	Website PROBABLY has info on LP	Not sure
	%	%	%	%
Casino_High	60	10	20	10
Casino_Low	63	38		
Club_High	59	7	7	26
Club_Low	41	30		30
Put/hotel_High	24	10		67
Pub/hotel_Low	24	15		61

Note: Total may not add to 100 due to rounding

Those who had looked at the venue website did so mainly to get information about upcoming events rather than anything to do with the loyalty program.

Most participants who had been to the venue website said the website contained little information about the LP.

> *Much of the venue's websites has some basic information on the rewards programs but no detail about what specific benefits are available and what applies to each tier. [Club_Low]*
>
> *There is a website that the hotel with pokies exist, but majority of the information is based on the restaurant, hotel & bar that's within the same hotel, however, there is nothing mentioned about becoming a member or nothing whatsoever about gambling, it's just a small mention of pokies in the hotel, that's it.[Pub/hotel_ High]*
>
> *The only gambling message is "club XXXX supports responsible gambling" [Club_ High]*

Subsequent to being asked the question, several participants then looked at the venue website to see what information it contained.

> *The first time I have ever visited the website was just on the last question to find out about a few things so I could answer the question well. - It includes info about the different types of memberships, what the benefits are, and how you can qualify. Also it's got a sign up online section. - I assume it does provide your account details when you login so you can find out how many points you have. - I didn't really notice anything. I assume there would be something about gambling responsibly. [Casino_Low]*
>
> *Never checked but will now, well now I know I actually had to give them a password when I signed up to access their website. They tell u how many points u need to earn a higher ranking card. [Pub/hotel_Low]*

5.3.6 Gambling loyalty programs – attitudes towards own LP

This section discusses how participants feel about their LP – whether they are satisfied with them and what they felt might be done to improve them.

Level of satisfaction with LP - summary

- A majority of participants were very or quite satisfied with their LP.
- Pub/hotel problem gamblers, however, were less satisfied.
- Many participants felt rewards could be improved.
- Two or three club and pub/hotel participants mentioned the contribution to the local community from their participation in the LP

A majority of participants were very or quite satisfied with their LP. Pub/hotel problem gamblers, however, were less satisfied.

Satisfaction and value do not necessarily go together (refer the table below). Club_Low were low on value but reasonably high on satisfaction; pub/hotel_ High were relatively high on value but low on satisfaction. The club result may be because LP membership is almost always free and people seem to feel particular loyalty towards clubs. High less satisfied than Low.

Table 5.9: Satisfaction with loyalty program

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
How satisfied are you with this loyalty program?	%	%	%	%	%
Very/quite satisfied	63	35	54	64	50
Not very/not at all satisfied	31	65	41	28	50
Don't know/NA	6	0	5	8	0

Note: Total may not add to 100 due to rounding

Many participants felt rewards could be improved.

I suppose I feel a little more positive about playing there because of the loyalty card but I wouldn't say they are great value. [Pub/hotel_ High]

I think the return should be greater. The small discount & return that you receive is nowhere near enough. [Club_ High]

The reward program is getting harder to feel rewarded. Previously, we'd swipe our card and get a free member's draw entry each day that we visited the venue, now entry is based minimum $30 spend into machine. Cards were free, now there's a cost to replace lost cards and there's talk of a yearly fee. Points could be added or corrected manually by the gaming manager, now no changes are considered possible. Members had a number of small prize draw lotteries, now it's one big draw about every three months. [Pub/hotel_ High]

I don't think the Casino offers enough incentive for the small gambler [Casino_Low]

Two or three club and pub/hotel participants mentioned the contribution to the local community from their participation in the LP

I think the rewards programme helps you feel part of a local community in a local pub or RSL. With [XXX] casino, there's no community, Knowing the money I spend mostly stays local is great for me and actually feels like a donation to local causes when I play. [Pub/hotel_Low]

Value for money – summary

- Unprompted, participants generally seemed to recognise that rewards aren't really 'free' and that they end up costing much more than if you just bought them.

Unprompted, participants generally seemed to recognise that rewards aren't really "free" and that they end up costing much more than if you just bought them.

When you work out just how much you have to spend/turnover on pokies machines, the vouchers are really not that great a reward, but they fool us into thinking we're getting something back. A few years ago, a lot of pubs had a "prize cabinet", where you could swap your points for items that appealed to you. But you always seemed to need an enormous amount of point for even the tiniest or least useful item. [Pub/hotel_ High]

I really find that they are really all a bit of a rip off because you have to spend heaps of money to get points [Pub/hotel_Low]

You have to spend a fortune to actually win any points in the first place and then you don't get much back in rewards. [Casino_ High]

You need to spend a lot on the pokies for the points to accumulate and yes I play more than I should to get the points. Sometimes I think it would be cheaper if I just paid full price for my meals and drinks. [Club_ High]

Even this participant, for example, put "for free" in quotation marks:

Anything 'for free' is good. [Pub/hotel_Low]

Ideal LP – summary

- Participants provided a variety of suggestions for an ideal LP, some of which are commonly offered and some of which are not.
- Little mention was made of venue atmosphere or patron treatment, despite these issues figuring prominently in a prior discussion regarding choice of venue
- Club participants seemed to know less about LPs and had fewer ideas about what an ideal program might look like, presumably because many were signed up automatically with their general membership.

Participants were asked to describe their ideal loyalty program. **Most common mentions included:**

- Free or discounted meals and drinks
- Free or discounted accommodation
- Free parking
- Cash back or a percentage of amount spent gambling given back, particularly in real time so would receive the reward on the spot
- Not having to be present to win prize draws (clubs)
- Ability to use rewards/points across anything in the venue and also outside the venue
- Points for years of membership (loyalty) (clubs)

Interesting is that **almost no one in response to this question mentioned venue atmosphere or how they are treated,** yet when participants were asked what they liked about their preferred venue, these were the types of issues most prominently mentioned.

The following was an exception:

> *There would be a level of personal attention you would get if you were at the top level of the loyalty program (better parking options, being recognised by name, cash draws that you were more likely to get the higher your loyalty level etc. [Pub/hotel_ High]*

Club participants seemed to know less about LPs and had fewer ideas about what an ideal program might look like. This may be due to the fact that many were signed up automatically as part of their general club membership.

Although previously participants had said they did not compare loyalty programs when deciding which to choose,

5.3.7 Gambling loyalty programs –gambling behaviours

This section presents the results of discussions around how being a member of a gambling loyalty program may or may not influence gambling behaviours, including the extent to which they make use of their LPs, and the perceived influence of LP on choice of venue, and time and money spent gambling. These findings are central to helping us answer some of the key research questions posed by this study.

When asked directly about impact of LPM on gambling behaviours, the overwhelming majority of participants, whether problem gamblers or lower risk gamblers, insisted that their LP did not affect their gambling behaviour. However, it was clear from the language used by participants that in most cases they understood "impact" to mean "determined". In other words, most participants interpreted the questions as asking whether their LPM directly determined their choice of venue or the amount of money they spent, as opposed to contributing to these decisions even if indirectly. Any influence of LPs, however, is likely less direct and more subconscious, as evidenced by other comments acknowledging that perhaps they ended up at a venue, or spent more time or money gambling than they had planned, in part to accumulate more points or to try to get a particular reward.

Extent to which use LP card/membership – summary

- Most participants made use of their membership every time they visited the venue.
- A minority said they sometimes or often forgot.
- Almost all, however, included the caveat that using their membership card had no impact on their gambling behaviour.

Most participants made use of their membership every time they visited the venue *– often this consisted of inserting their card into machines or some other device.*

I use my membership card each time I visit [Club_Low]

I have a loyalty card for one pokie venue that I go to and always use it when I'm there. [Pub/Hotel_ High]

I will use my loyalty card every time I go to the club. [Club_ High]

A minority said they sometimes or often forgot.

I forget sometimes to insert my card so you can say it doesn't make a difference to me. [Casino_ High]

Sometimes I won't use my card because I forget it's in the machine and I get fed up with "remembering" which machine I left it in. [Pub/Hotel_Low]

I always use my loyalty/membership card at the RSL. I seem to forget to take my casino loyalty card with me because most times I will go with friends and it is spur of the moment. [Casino_Low]

Almost all, however, included the caveat that using their membership card had no impact on their gambling behaviour.

Every time I play pokies at the casino I swipe my card so I gather points and rewards. It doesn't encourage me one way or another. [Casino_ High]

I use my member ship card each time I visit but the card does not encourage me to visit more or spend more on the pokies. [Club_Low]

I use it where ever I have one but it doesn't encourage me to visit or play pokies. [Pub/Hotel_High]

I will use my loyalty card every time I go to the club, but having this card does not entice me to play the pokies. I do not care if venue has a loyalty program or not. [Club_ High]

LP and influence on choice of venue - summary

- A majority of participants who responded to this question claimed that their LP did not influence their choice of gambling venue.
- A minority, however, admitted that it did.
- If another (nearby) venue offered a better LP, significant percentages of participants said they might switch venues.

There was a great variety of opinion regarding whether the venue having a LP or not affects whether or the extent to which they visit that venue.

A majority of participants who responded to this question claimed that their LP did not influence their choice of gambling venue.

I swipe my card every time I go there. I don't think it encourages me to visit anymore as I go to play the pokies and not to swipe my card for a few reward points. I don't think it encourages me to play more; I play because I love doing it and a card which I swipe does not make me play. [Casino_ High]

Loyalty programs have no bearing on my decision of where I play pokies. I join clubs out of convenience for their location. I play the pokies at the clubs I am a member of because they are close to home. [Club_ High]

A significant minority, however, admitted that it did.

I always put my membership card in the machine & make use of it cause it comes up with the message "Good luck [name]" & this makes me feel important & welcome & makes me feel like I might have a better chance of winning... stupid but it does reinforce my gambling behaviour. I think these little things do make me play more often cause I feel like I am part of the club.

It does not encourage me to play but it is a form of enticement to go back to said venue [Club_ High]

If another (nearby) venue offered a better LP, significant percentages of participants said they might switch venues.

This finding illustrates that that LPs may have a greater influence on choice of venue than participants admit, or perhaps are aware of.

> *If the other venue was close by, then I would go there occasionally or even permanently but it has to be close by otherwise I wouldn't bother going too far. [Club_ High]*
>
> *I may consider changing to a different venue, it would really depend on what types of programs to reward their customers they offer. [Casino_Low]*

Overall, problem gamblers at pubs/hotels appear the least "loyal", with almost two-thirds (65%) saying they would be very or quite likely to change venues for a better loyalty program (refer to the table below). Casino respondents were relatively "disloyal", but then many pointed out that there were no other casinos nearby, suggesting that they prefer casinos and would not consider switching to a club or pub/hotel. Club_Low participants were the most loyal, with just 18 per cent saying they would be very or quite likely to switch to a venue with a better loyalty program. From the comments made, it is likely that problem gambler club members would report similar results, given the emotional tie many club members expressed towards their club.

Many participants, and particularly those at clubs and pubs/hotels, stated that venue atmosphere and proximity to home or work was more important to them than whether the venue had a loyalty program or what it provided.

Apart from those who said there was no way they would switch, most admitted if the program was really great (and perhaps also if close by and had a decent atmosphere), they would consider switching, or maybe just adding on.

Table 5.10: Likelihood better loyalty program would influence where play pokies

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
How likely is it that a better loyalty program would influence where you go to play the pokies?	%	%	%	%	%
Very/quite likely	31	65	18	44	35
Not very likely/very unlikely	63	30	82	50	65
Don't know/NA	6	4	0	6	0

Note: Total may not add to 100 due to rounding

LPs and influence on frequency of EGM playing - summary

- Most participants said the LP membership did not affect how often they visited the venue or played the pokies.
- Problem gamblers were more likely than lower-risk gamblers to say that their LP membership affected how often they play.

Most participants said their LP membership did not affect how often they played EGMs.

The loyalty program has no influence on how much I attend the club, however, I always use my membership card when I'm there. I might as well get something back for the amount of money I spend in the club. [Club_ High]

To a certain extent they did influence time/spending but I find my biggest influence is my mood at the time. I play more and spend more liberally when I am frustrated with life so I am more of an emotional gambler rather than one who chases rewards from loyalty programs. [Hotel_ High]

Problem gamblers were more likely than lower-risk gamblers to say that their LP membership affected how often they play.

Almost one-third (30%) of casino and pub/hotel gamblers reported that their LP memberships was either very or quite influential on how often they play the pokies. This compared with between just 8 per cent (lower-risk club participants) and 25 per cent (lower-risk casino participants) for the lower-risk groups.

Table 5.11: Influence of loyalty program on how often play pokies

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
How much influence does your loyalty program have on how often you play the pokies?	%	%	%	%	%
Very/quite influential	13	30	8	25	30
Not very /not at all influential	88	70	92	72	70
Don't know/NA	0	0	0	3	0

Note: Total may not add to 100 due to rounding

LPs and influence on time spent playing EGMs - summary

- Most participants said their LP membership did not affect how long they spent playing the pokies.
- In part this is because money and not time was generally the determining factor.
- Problem gamblers were more likely than lower-risk gamblers to say that their LP membership affected how long they play.

Participants generally stayed at the venue: (a) until they ran out of money; (b) until they hit their pre-set money limit; and/or (c) whether they were winning or losing ('a lucky/unlucky streak'). Therefore, because they did not think about gambling in terms of time, but rather money, **few believed that their loyalty program influenced them to spend more time playing the pokies.**

Problem gamblers were more likely to agree that there was a connection, with approximately one-fifth (20-22%) stating that their loyalty program is either very or quite influential in how long they spend playing the pokies. Very few lower-risk gamblers, however, reported this connection.

Table 5.12: Influence of loyalty program on time spent playing pokies

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
How much influence does your loyalty program have on how long you spend playing the pokies?	%	%	%	%	%
Very/quite influential	0	22	3	8	20
Not very /not at all influential	97	72	97	89	80
Don't know/NA	3	4	0	3	0

Note: Total may not add to 100 due to rounding

LPs influence on money spent playing EGMs - summary

- Most participants said their LP membership did not affect how much money they spent playing the pokies.
- Problem gamblers were more likely than lower-risk gamblers to say that their LP membership affected how much money they spent.

As with perceived links between LP and frequency or time spent playing the pokies, most participants said their loyalty program has either not very much or no influence on the amount of money they spend gambling.

Similar to the prior discussion, problem gamblers are more likely than lower-risk gamblers to report influence.

> *I find if my card shows I am close to getting a gift voucher I will try to play until I reach the desired amount on my loyalty card. [Club_ High]*

Lower-risk casino participants more likely than the other lower-risk groups to say that their LP had some influence on the amount of money they spent gambling.

Table 5.13: Influence of loyalty program on money spent playing pokies

Base: All participants	Hotel/pub Low (n=32)	Hotel/pub High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
How much influence does your loyalty program have on how much money you spend playing the pokies?	%	%	%	%	%
Very/quite influential	0	26	3	17	30
Not very /not at all influential	97	75	97	83	70
Don't know/NA	3	9	0	0	0

Note: Total may not add to 100 due to rounding

LP's influence on gambling behaviour – in general - summary

- Most participants insisted their LP memberships had no impact on their gambling behaviours.
- A minority of participants, however, acknowledged that their LP probably does affect their gambling behaviours.
- Participants who acknowledged having a prior problem with gambling were particularly likely to say that LPM influenced their gambling behaviours.
- Participants reported that LPs most influence choice of venue, followed by how often they play the pokies, how much money they spend on the pokies, and finally how long they play the pokies.

Most participants insisted that LP membership has no impact on their gambling behaviours; this included many of those categorised as "problem gamblers" according to the PGSI.

In my opinion the loyalty program is just there. I don't really think about it. [Club_ High]

It's not such a big deal to get a cheaper coffee. It's not what makes me go. [Pub/hotel_ High]

It doesn't matter to me as [the LP] is just a side note. I play pokies for fun and only little amounts at a time so the rewards take forever to accumulate [Club_Low]

A minority of participants, however, acknowledged that their LP probably does affect their gambling behaviours.

I must say that I am not really a fan of loyalty programs anymore, as I have found that when I used them I just spent way too much money chasing points that I really couldn't afford. [Pub/hotel_ High]

I feel there is too much emphasis placed on pokie promotions which only encourage me to play the machines more. [Pub/hotel_Low]

I was given a membership level one up from what I was used to. Now I have that membership tier I want to keep it as includes unlimited parking important to me. I… would like to go up a tier see what else is offered curious but reluctant to spend more than my current budget for gambling to find out. I was told you could book a stay in one of their hotels to build up points. [Casino_Low]

Participants who acknowledged having a prior problem with gambling were particularly likely to say that LPM influenced their gambling behaviours.

> *I originally joined to gain rewards while playing within my means, but the incentives took over and I ended up chasing points. I then scrapped the cards about 18 months ago and will never sign up again. [Pub/Hotel_ High]*
>
> *I don't use my cards at all anymore as they did influence me to play more and spend more money chasing points. [Pub/Hotel_ High]*

Participants reported that LPs most influence choice of venue, followed by how often they play the pokies, how much money they spend on the pokies, and finally how long they play the pokies.

From the series of survey questions on perceived influence of LPs, we can see that almost 40% of participants (weighting each group equally) thought it very or quite likely that a better LP would influence where they play. This suggests that LPs may influence choice of venue for many LPMs. Slightly more than 20% thought that their LP influenced how often they played the pokies. This was followed by influence on how much money they spent on the pokies (18%) and how long they play the pokies (11%).

This ranking of LP impact, from choice of venue to length of play, was consistent across groups.

Table 5.14: Influence of loyalty program on money spent playing pokies

Base: All participants	Hotel/pub Low (n=32)	Hotel/pub High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)	TOTAL (each gp weighted equally)
	%	%	%	%	%	%
Likelihood that better LP would influence where play (very/quite likely)	31	65	18	44	35	**39**
Influence of LP on how often play pokies (very/quite)	13	30	8	25	30	**21**
Influence of LP on how much money spend on pokies (very/quite)	0	26	3	17	30	**18**
Influence of LP on how long play pokies (very/quite)	0	22	3	8	20	**11**

Note: Total may not add to 100 due to rounding

5.3.8 LPs and harm

The general consensus amongst board participants was that loyalty programs could be harmful to people with a gambling addiction. Many commented that the danger lies much more with the pokies than with loyalty programs. Most did not see any link between loyalty programs and the pokies; rather, most spoke of them as separate, with pokies playing potentially leading to problem gambling, but not loyalty programs, and with loyalty programs not impacting on pokies playing.

- Most participants agreed that LPs may post harm to those with an addiction.
- For non-addicts, however, any negative impact is minimal.
- Many participants argues that problem gambling is caused by playing the pokies too much, not from becoming a LP member.
- However, others acknowledged the pull of loyalty programs.

Table 5.15: Perceived harmfulness of loyalty programs in influencing behaviour and spending

Base: All participants	Pub/Hotel Low (n=32)	Pub/Hotel High (n=23)	Club Low (n=39)	Casino Low (n=36)	Casino High (n=20)
How harmful do you think loyalty programs are when it comes to influencing people's behaviour and spending?	%	%	%	%	%
Very/quite harmful	31	57	33	31	40
Not very /not at all harmful	59	35	64	67	60
Don't know/NA	9	9	3	3	0

Note: Total may not add to 100 due to rounding

Many participants agreed that loyalty programs may pose harm to those with an addiction.

[LPs] can be harmful, forcing the addicts to play more than they can afford to get free stuff. [Casino_ High]

[name] Club often send me mail outs that I have been rewarded with extra playing $ to be used at a certain time between certain hours. For me this isn't negative as I rarely utilise these, however for others I could see this might be a negative impact for those with a gambling problem. [Casino_Low]

I think they are a danger to an addict like myself…. I think if you don't have a gambling problem the loyalty cards would be ok. [Pub/hotel_Low]

I equate the loyalty programs in gaming rooms with the concept of happy-hour in a pub. For people who are not addicted to the behaviour, or have addictive tendencies, they are probably a good idea - as it gives them the opportunity to get something back for their money spent. But, just like an alcoholic would not do well at happy-hour, gamblers who are addicted to the behaviour are much more likely, in my opinion and in my own experience, to keep on spending when they shouldn't, just to get to the next level of reward. [Pub/Hotel_ High]

But for non-addicts, any negative impact is minimal.

I don't think so [LPs are harmful]. It is not as if it is a million dollars you get. It is only very miniscule. [Pub/hotel_Low]

Absolutely NOT! I believe people are intelligent enough to know the points (usually 1 point for a few dollars) are not worth it. Some with a gambling problem may use the cards as an excuse, but I am sure they do not really believe that. [Casino_Low]

Many participants argued that problem gambling is caused by playing the pokies too much, not from becoming a LP member.

I don't believe that these programs have a negative effect on people. The poker machines themselves are the negative effect. [Club_ High]

A gambler is a gambler, with or without a loyalty card. [Pub/hotel_Low]

I cannot see how they could be more harmful than the pokies themselves.... [Pub/hotel_Low]

However, others acknowledged the pull of loyalty programs.

> *Loyalty programs could encourage the person to visit that place more than usual because of the rewards and while they are at the venue, they might just gamble because it's so hard to resist. [Club_ High]*
>
> *I imagine some loyalty programs could be harmful. Especially if you are close to getting a certain gift or are desperate for money and go every night to win a car or money. [Casino_Low]*
>
> *The [LPs] at some casinos in the past have had golf days etc. with big prizes that could influence people to spend more than they should to keep on at loyalty level. [Club_Low]*
>
> *I have seen people play longer to get a certain gift from the gift cabinet at my local hotel. [Pub/hotel_Low]*

The following is a comment by a self-acknowledged problem gambler regarding the negative influence of LPs:

> *Yes, I do think the loyalty programs can be harmful for some people...myself included . I know that I shouldn't play the machines, can't walk away until I've won really big ...but more often lost the lot. I did cancel a couple of my memberships because I didn't want to get the monthly promotional material that might encourage me to go again. [Pub/hotel_ High]*

5.3.9 Ambivalence towards gambling loyalty programs

When participants were asked for any additional comments regarding gambling loyalty programs, an additional theme emerged: ambivalence regarding these programs. Several participants notes both positives and negatives, both for themselves and the larger public.

- Several participants described their ambivalence re: loyalty programs.
- This ambivalence was mostly expressed by problem gamblers, although lower-risk gamblers also recognised the positives and negatives.

Several participants described their ambivalence re: loyalty programs. This sentiment was mostly expressed by problem gamblers.

It's a catch 22 cause I like hearing about the specials in the restaurants so I continue to receive my emails but I have unsubscribed to text messages from my loyalty program cause it reinforces my gambling problems. I would like to unsubscribe from the emails but haven't done that yet cause the Casino has other entertainment and dining which I like to enjoy separate from the pokies. I think the Loyalty program reinforces gambling…. [Casino_ High]

In a way, it's good that venues have loyalty programs in place for people to get points on their activities at the venue which can then be redeemed for things like meals and drinks but on the other hand it does bring addiction as people who fall into gambling more easily will spend little more time and money gambling since they already are at the venue. We have bingo nights at our venue and get raffle tickets as part of it which is drawn after the break during our bingo session. The interesting thing is that they actually promote and encourage gambling in a way that once you are on your break during the bingo session and if you play pokies, you will then get extra raffle tickets and drink discount vouchers for free. So I don't think it's such a good idea but for those who would play anyway, I guess it's nice. [Club_ High]

I think it can sometimes affect those trying to build up points to reach a certain amount on their loyalty card, it can be an issue with most gamblers because it'll impact the set amount they originally wanted to spend. On the other hand, if you're already going to gamble, it's good to have the benefits of building points especially when you're losing. You at least don't walk away empty handed as your credits are higher than when you first walked in. [Pub/hotel_ High]

Some lower-risk gamblers also recognised the positives and negatives of LPs.

I like the fact that they have a loyalty scheme; it enhances the experience as I would probably go anyway but this probably makes me go a little bit more. [Casino_Low]

I don't see loyalty programs as a huge importance to a small time gambler like myself. Maybe for those who gamble larger amounts and more often they are beneficial as points are accumulated quicker. However I do feel the influence to gamble when promotions are running that require playing machines to have an entry as I tend to put more than intended into the machines. [Pub./hotel_Low]

5.4 Discussion

The purpose of Study 3 (online discussion boards) was to hear how people who belong to gambling loyalty programs at EGM venues talk about their loyalty programs and, in particular, to understand their perspective on any impact they think their membership has on their gambling behaviours. Online discussion boards were chosen as the methodology because they allow for in-depth, ongoing discussion over a period of time, and anonymity and convenience for participants. All participants were loyalty program members. Composition of each board was based on level of gambling risk as determined by PGSI score, administered during recruitment/pre-screening, as well as stated primary gambling venue (casino, club or pub/hotel) because existing evidence suggests that these two variables may be important factors regarding loyalty programs and gambling behaviours. A total of 200 LPMs participated in the boards.

Discussion topics included:

- Choice of Venue / reasons for choice of venue
- EGM playing behaviours (e.g. money and time spent; frequency; pattern of play)
- Loyalty program: how it works; types of rewards; attitudes towards particular LP
- Communications received re: LP, including account information
- Perceived influence of LP on gambling behaviours
- Attitudes towards LPs, both specifically and in general

A **key finding** was that most participants, when directly asked, stated that their loyalty program membership does not affect their gambling behaviour. **However, other comments by these same participants revealed that in fact this may not entirely be the case, with some participants espousing contradictory effects of loyalty program membership (including gambling for a longer period of time and wagering more than they had intended).** Below are some examples of comments to illustrate this point. Problem gamblers and former problem gamblers were more likely to say that their LPM affected their gambling behaviour, in terms of money or time spent, or frequency of play.

Table 5.16: Perceived linkages between loyalty programs and gambling behaviour

Person	Comments made when asked directly whether there is a link between loyalty programs and gambling behaviours	Comments made when discussing their use of loyalty programs
Club_High	*Loyalty programs don't really have an impact on whether I play the pokies, or not.*	*Originally I joined the clubs for social reasons, before I started playing pokies.* *At times I may drink more alcohol than usual if I have an accumulation of points. This behaviour could be harmful in that it could lead to driving offences and other alcohol related adverse behaviour by some. I do know of some who may play more recklessly because they've had too many (free) drinks.*
Club_High	*I play for a certain amount of time the points do not affect this.*	*It does not encourage me to play but it is a form of enticement to go back to said venue.* *I spend my daily gambling allowance but if I win I will keep playing to get extra points.*
Casino_High	*Every time I play pokies at the casino I swipe my card so I gather points and rewards. It doesn't encourage me one way or another.*	*I normally go in with an intention of spending my limit. If I'm close to earning a certain amount of member points, then I may put in 10-20% more based on my points balance.*
Pub/Hotel_High	*A loyalty program doesn't really encourage me any more to go and play...if there is no program and I have the opportunity to play, I just play.*	*If the hotel has a competition in the gaming room, that makes you want to play more to win that. A few years ago we were in an unfamiliar hotel and there were competitions to get certain combinations and we won corporate box tickets to see XXX. But we probably spent more than we wanted to as it was fun and you wanted obviously to win that bonus. The most harm would be spending more than you could afford, to win something better.*

A **second** key finding regards the **inducements by the venues** to encourage patrons to join the loyalty program. In the case of club members, for example, often LP membership was included automatically as part of the general club membership. This meant that many club members did not even realise they were joining a LP until after the fact, or in any case did not have a choice regarding whether to join or not if they wanted to become a club member. Casino and pub/hotel patrons were often approached by staff regarding joining the LP, and in some cases staff at pubs/hotels filled out the membership paperwork for them. Some pub/hotel patrons were told that they were required to join the LP if they wanted to gamble at the venue because they lived within a certain distance of the pub/hotel.

Third, many patrons across all six boards admitted that **they did not really understand how the LP worked**, despite participating in it.

Fourth, although most participants said they received information from the venue regarding number of point accumulated – often this appeared automatically when they swiped their card, **almost none said they received information regarding money and time spent gambling**. A few said they thought they might be able to get this information if they asked. Some problem gamblers stated they would not want this information, whereas most lower-risk gamblers and some problem gamblers thought that being provided this information might help them regulate their gambling.

Finally, most participants, including those who enjoyed their LP and saw no ill effects of being a member on their own gambling behaviours, often **expressed somewhat ambivalent attitudes about gambling loyalty programs** in general. Most recognised that they could cause difficulties for some people and that rewards were usually not worth much when compared with the amount of money gambled to get them. At the same time, most participants enjoy playing the pokies and felt that belonging to a LP "at least gives you something back".

Overall, most participants had been fairly passive in terms of joining their LP, with many approached about membership by a venue staff member or signed up automatically with the general club membership. Joining was mostly easy and free, none of the participants said they compared programs when they joined, many belonged to more than one LP, and several stated they saw or assumed there was little difference among LPs. Most were also reasonably happy with their LP and did not feel that it unduly affected their gambling behaviour, although this was less true of problem gamblers. It was also the case that several participants who initially said that their LPM had no impact on their gambling behaviour later made comments contradicting this initial statement, which suggests that impact of LPs may be real but not obvious to the gambler. This possibility is explored with the longitudinal survey data.

6 Three-wave longitudinal (panel) telephone survey

This section of the report presents the methodology, findings and discussion for Study 4: the three-wave, longitudinal telephone survey of Australians with at least an interest in playing EGMs. For purposes of this discussion, “loyalty programs” (LPs) are understood to mean gambling loyalty programs at EGM venues.

6.1 Objectives

The main objective of the survey was to investigate the impact of loyalty programs on gambling behaviours over time using a three-wave, longitudinal survey design.

It focused on answering the following research questions, as provided in the project brief:

1. Do loyalty programs increase amount of money spent gambling?
2. Do loyalty programs increase amount of time spent gambling?
3. Do loyalty programs increase gambling frequency?
4. Do loyalty programs result in increased risk of problem gambling?
5. Do loyalty programs result in reduced feelings of control around gambling?
6. Do loyalty programs reward “loyalty” (i.e. faithfulness and devotion; they visit that venue rather than another venue) or create “incentive” (i.e. encouragement to gamble more money/for longer)?
7. Do “high success” loyalty programs result in more money spent gambling?
8. Do “high success” loyalty programs result in more time spent gambling?
9. Do “high success” loyalty programs result in increased gambling risk?

6.2 Methodology

In order to provide best evidence regarding impact of loyalty programs on gambling behaviours and risk over time, a longitudinal panel survey was conducted over three waves, each six months apart. Longitudinal panel surveys, in which the same people are interviewed repeatedly over a period of time, are ideal for understanding behavioural change (Singer & Willett, 2003).

Although such an approach is more expensive and time-intensive than repeat cross-sectional surveys, it is superior for the following reasons:

- Greater statistical power, meaning that smaller statistically significant differences can be detected. With repeat cross-sectional surveys, significant differences may not be detected because of the larger error rates associated with this type of analysis.
- Ability to assess change in individuals over time, meaning that we can draw conclusions regarding the impact of a range of individual attributes on outcomes. With cross-sectional surveys, we can only monitor the aggregate of effects (Yee & Niemeier, 1996).

6.2.1 Sample sources

Survey participants were recruited from various sources and using a combination of methods:

- Users of Facebook and Google
- Subscribers to the Pro Punter newsletter
- Members of a consumer panel
- Contacts of professional recruiters
- Listings in a commercially available telephone database

The focus was on recruiting people who gambled on EGMs or had at least some interest in playing EGMs. Advertising was placed on Facebook, Google and in the Pro Punter newsletter. The ads briefly described the research study and provided a link to an online form where interested individuals could register their interest in the study. A copy of the registration form is included in the Appendix. Consumer panel providers and professional recruiters sent out an email on our behalf to their members/contacts that fit the target profile. The email provided details about the research study and provided the link to the online registration form. Survey participants therefore comprised people who opted in to the study prior to being telephoned, as well as people who had not (i.e., who were cold-called via random dialling from a commercially available telephone database).

The survey sample was stratified by:

- level of gambling risk according to the PGSI
- EGM player status (current/not current player)
- LPM status

The following table presents the breakdown of proposed interviews that we aimed to complete for the study.

Table 6.1: Proposed recruiting schedule for wave 1

Risk level	Current EGM Players*		Non-current EGM Players	Total
	LP Member	Non LP Member		
Moderate risk/Problem gambler	400	200	-	600
Low risk/no risk	400	200	-	600
Interest in playing EGMs	-	-	400	400
TOTAL	800	400	400	1600

**Played at least once in last month*

6.2.2 Interviewing

To assist with the recruiting process and overall survey participation rates, an incentive was offered. Participants in wave 1 were notified that if they completed the survey they could enter a prize draw to win a $500 shopping voucher. In order to qualify for the research, participants had to be aged 18 years or older and either have played the EGMs in the past 12 months or indicate that they were likely to play EGMs in the future (i.e. some interest in playing). Due to difficulties with recruitment of current gamblers, the definition of “current EGM player” was changed from “played in past month” to “played in past three months”. This change was made in consultation with GRA. Interviews were conducted by telephone using a CATI approach. The initial wave of data collection was conducted during May and June 2014.

The following tables present the breakdown of **actual** interviews achieved for each wave of the study.

Table 6.2: Actual interviews completed for wave 1

Risk level	Current EGM Players*		Non current EGM Players	Total
	LP Member	Non LP Member		
Moderate risk/Problem gambler	209	102		311
Low risk/no risk	286	262		548
Interest in playing EGMs	-	-	604	604
TOTAL	495	364	604	1463

Played at least once in last three months

Table 6.3: Actual interviews completed for wave 2

Risk level	Current EGM Players*		Non current EGM Players	Total
	LP Member	Non LP Member		
Moderate risk/Problem gambler	114	61		175
Low risk/no risk	208	157		365
Interest in playing EGMs	-	-	648	648
TOTAL	322	218	648	1188

Played at least once in last three months

Table 6.4: Actual interviews completed for wave 3

Risk level	Current EGM Players*		Non current EGM Players	Total
	LP Member	Non LP Member		
Moderate risk/Problem gambler	93	42		135
Low risk/no risk	180	139		319
Interest in playing EGMs	-	-	664	664
TOTAL	273	181	664	1118

Played at least once in last three months

The following table indicates the number of total interviews completed for each wave.

Table 6.5: Telephone survey number of total completed interviews by wave

	Wave 1 May-Jun 14	Wave 2 Nov-Dec 14	Wave 3 May-Jun 15
Number of interviews completed	1,463	1,188	1,118

Attrition rates

Some individuals who participated in wave 1 were unable to be contacted in wave 2. We attempted to re-contact them for wave 3. Respondents who had registered for the study but whom we were unable to contact in wave 1 were re-contacted in wave 2. We did not attempt to recruit new respondents in wave 3. The final dataset, therefore, consisted of people who completed all three waves, two waves, or a single wave (wave 1 or wave 2). To reduce attrition rates, individuals classified as "soft refusals" by the interviewer in the initial telephone call were re-contacted by a senior interviewer and re-invited to participate. In addition, multiple contact details were collected from respondents (i.e. mobile and landline telephone numbers; email address; contact details of family/friends) in order to maximise re-contact rates.

Table 6.6: Participation across waves

Completed all three waves	Wave 1 + Wave 2 + Wave 3 n=926		
Completed two waves	Wave 1 + Wave 2 n=153	Wave 1 + Wave 3 n=120	Wave 2 + Wave 3 n=72
Completed one wave	Wave 1 only n=264	Wave 2 only n=37	Wave 3 only n=0
TOTAL PARTICIPANTS	n=1,572		

Attrition rates across waves were somewhat higher for higher-risk and heavier gamblers, as can be seen from the table, below. For example, of the 115 survey participants in wave 1 classified as problem gamblers, 37% did not participate in wave 2, whereas the attrition rate between waves 1 and 2 for participants classified as non-problem gamblers at wave 1 was only 24%. Similarly, whereas the dropout rate between waves 1 and 2 for participants who said at wave 1 that they played EGMs monthly or more frequently was 31%, it was only 24% who said at wave 1 they played less often[22].

We have found this same pattern in other gambling studies we have conducted. Likely this differential result is due to the more chaotic lives lead by people who are experiencing problems around gambling and who are thus more difficult to contact for a telephone survey. It is also possible that heavier and problem gamblers experience some level of shame around their gambling and thus are less likely to continue to participate in a survey that asks them questions around this behaviour.

[22] Some participants completed only Waves 1 and 3, or Waves 2 and 3. We have not shown attrition rates for these people, but a similar pattern is apparent whereby more frequent gamblers and those with higher PGSI scores are more likely to drop out of the survey.

Table 6.7: Attrition between waves – PGSI score & gambling frequency

PGSI	Wave 1 (n)	Wave 2 (n)	Attrition (%)	Wave 2 (n)	Wave 3 (n)	Attrition (%)
Non-player	348	278	**20**	330	285	**14**
No risk (PGSI score = 0)	539	409	**24**	486	413	**15**
Low risk (PGSI score = 1-2)	241	165	**32**	164	143	**13**
Moderate risk (PGSI score = 3-7)	220	154	**30**	132	98	**26**
Problem gambler (PGSI score = 8-27)	115	73	**37**	76	59	**22**
TOTAL	1463	1079	26	1188	998	16

Gambling Frequency	Wave 1 (n)	Wave 2 (n)	Attrition (%)	Wave 2 (n)	Wave 3 (n)	Attrition (%)
Non-player	348	278	**20**	330	285	**14**
Less often than monthly	424	321	**24**	397	328	**17**
Monthly or more frequently	688	478	**31**	460	384	**17**
Don't know/Refused	3	2	**33**	1	1	**0**
TOTAL	1463	1079	26	1188	998	16

Call results

The following tables provide call summary statistics for each of the three waves of telephone interviewing completed. It should be noted that these figures are based on a combination of sample sources. In wave 1 this included a random sample (cold calling), hence the high rate (67%) of in-scope contacts who declined to participate. In-scope contacts are defined as those who qualify for the research. The wave 1 table further shows that of the in-scope contacts made, overall 26% resulted in a completed interview (it was around 80% for those who had previously registered interest). Attempts resulting in no contact (no answer, answering machine and engaged) were tried a minimum of three times to minimise sample loss and possible sample bias.

Table 6.8: Wave 1 - Final Call Result Codes (After All Attempts)

WAVE 1 - Final Call Result	Count of numbers dialled	% of numbers dialled	% of In-scope Contacts
IN SCOPE CONTACTS			
Completed Interviews	1463	8.9%	25.5%
Surplus callbacks	31	0.2%	0.5%
Declined to participate	3831	23.2%	66.7%
Terminated early	16	0.1%	0.3%
Communication difficulties	404	2.4%	7.0%
Total In-Scope Contacts	**5745**	**34.8%**	**100.0%**
OTHER CONTACTS			
Non qualifying respondents	1519	9.2%	
Government / business number	193	1.2%	
Duplicate/over quota	1123	6.8%	
Incorrect details	39	0.2%	
Total Other Contacts	**2874**	**17.4%**	
NON CONTACTS			
No contact after all attempts	4222	25.6%	
Non-working numbers	3682	22.3%	
Total Non - Contacts	7904	47.8%	
TOTAL	16523	100.0%	

A total of 80% (wave 2) and 88% (wave 3) of in-scope contacts resulted in completed interviews.

Table 6.9: Wave 2 - Final Call Result Codes (After All Attempts)

WAVE 2 - Final Call Result	Count of numbers dialled	% of numbers dialled	% of In-scope Contacts
IN SCOPE CONTACTS			
Completed Interviews	1188	62.5%	80.3%
Surplus callbacks	34	1.8%	2.3%
Declined to participate	248	13.0%	16.8%
Terminated early	1	0.1%	0.1%
Communication difficulties	8	0.4%	0.5%
Total In-Scope Contacts	**1479**	**77.8%**	**100.0%**
OTHER CONTACTS			
Non qualifying respondents	0	0.0%	
Government / business number	1	0.1%	
Duplicate/over quota	14	0.7%	
Incorrect details	33	1.7%	
Total Other Contacts	**48**	**2.5%**	
NON CONTACTS			
No contact after all attempts	322	16.9%	
Non-working numbers	52	2.7%	
Total Non - Contacts	374	19.7%	
TOTAL	1901	100.0%	

Table 6.10: Wave 3 - Final Call Result Codes (After All Attempts)

WAVE 3 - Final Call Result	Count of numbers dialled	% of numbers dialled	% of In-scope Contacts
IN SCOPE CONTACTS			
Completed Interviews	1118	70.5%	87.9%
Surplus callbacks	20	1.3%	1.6%
Declined to participate	130	8.2%	10.2%
Terminated early	3	0.2%	0.2%
Communication difficulties	1	0.1%	0.1%
Total In-Scope Contacts	**1272**	**80.3%**	**100.0%**
OTHER CONTACTS			
Non qualifying respondents	0	0.0%	
Government / business number	0	0.0%	
Duplicate/over quota	10	0.6%	
Incorrect details	28	1.8%	
Total Other Contacts	**38**	**2.4%**	
NON CONTACTS			
No contact after all attempts	227	14.3%	
Non-working numbers	48	3.0%	
Total Non - Contacts	275	17.4%	
TOTAL	1585	100.0%	

6.2.3 The questionnaire

Survey questions focused on addressing the **key research questions**. Content and language used was informed by the audit, literature review and discussion boards, as well as input from our topic experts. Respondents who belonged to more than one loyalty program were asked details about the one they use most frequently.

Survey questions focused on the following issues. A copy of the survey instrument is included in the Appendix.

Table 6.11: Survey Topics

Survey Topics
Name of venue(s) and loyalty program(s)
What the program provides
How they became a member / how they found out about the program
The extent to which they are contacted about the program between visits
Perceptions regarding how the program is marketed / description of marketing materials
Satisfaction with loyalty program / likes and dislikes
Level of use of loyalty program
Awareness of / attention to responsible gambling messages that may be part of the loyalty program
EGM playing behaviour: frequency, time, money, etc. (that venue and others)
Attitudes towards gambling, including perception of level of control over frequency, time, money, etc.
Problem Gambling Severity Index
Other measures of difficulties around gambling
Demographics
Multiple contact details for subsequent waves (landline, mobile, email, friends, family)

The average interview length was **20 minutes**, although this varied from participant to participant depending on how recently they had gambled / played EGMs and whether they were a member of a loyalty program.

A pilot test with 50 respondents (10 in each stratification category) was conducted prior to the full wave 1 survey to test survey length, language and flow. A report on results from the pilot and suggested changes to the survey instrument was provided to GRA.

Changes made to the questionnaire as a result of the pilot test included:

- Revised wording of introduction to more quickly engage respondents
- Removal of “don’t know” and “refused” options where not warranted
- Skips added to avoid having respondents repeat information
- Order of questions reorganised to improve survey flow
- Interviewer notes added to some questions for clarification
- Option added, “didn’t receive any information” to question about receiving communications about loyalty programs
- New question added about loyalty programs: Q.27: When you signed up, did you get any points or rewards right away?
- Revised wording on two questions asking about how points are accrued
- Revised codeframes for several questions based on results of the literature review and online discussion boards

6.2.4 Analysis

The primary analytical approach used for this phase of the study was Generalised Linear Mixed Modelling (GLMM), a type of multilevel modelling (MM) that allows for linear as well as nonlinear models under a single framework. A more detailed discussion of this approach, including citations, is included in the Appendix.

MM has several advantages over more traditional techniques often used to analyse longitudinal data, including that MM incorporates the fact that measurements for an individual over time are likely correlated with one another, thus avoiding bias in standard errors. In other words, it is likely that someone’s measurement at wave 1 (e.g. their PGSI score) is correlated with their measurement at wave 2. Less sophisticated analytical approaches assume that these measurements are independent.

Within MM, a technique called Individual Growth Curves (IGC) analysis is used. IGC is generally perceived as the most advanced technique for accurately capturing both developmental changes over time as well as longitudinal patterns of treatment effects over time. These issues are crucial for this loyalty program research given our interest in understanding the impact of gambling loyalty program membership on gambling behaviours.

IGC analysis has several specific advantages over other techniques for analysing longitudinal data. These include:

- IGC does not require that sample sizes be identical for each wave of data.
- IGC can handle missing data, meaning that it does not drop someone from the analysis because some of their data is missing.
- IGC allows for the examination of both changes over time within a given individual and changes over time across individuals. This means that we can examine differences between individuals in their initial status (e.g. how much money they spent gambling at wave 1) and also differences in their rates of change (e.g. whether those who became loyalty program members increase the amount of money they spent gambling at a faster rate than those who did not join a loyalty program).
- With three waves of data, IGC provides more precise estimates than is possible with other more traditional methods. This means greater certainty about the results as compared with other statistical approaches.
- IGC allows both discrete predictors (e.g. whether one is a loyalty program member or not) as well as time-variant predictors (e.g. someone who is not a LPM at wave 1, but is a LPM at waves 2 and 3).
- IGC is more powerful than other methods for identifying true change effects over time.

In order to address each of the key research questions, the following outcome variables are examined:

- Amount of money spent gambling (on last gambling occasion) (GAMBSPEND)
- Amount of time spent gambling (usually, past 12 months) (GAMBTIME)
- Frequency of gambling occasions (usually, past 12 months) (GAMBFREQ)
- PGSI score (PGSI_Score)
- Seven items from the Gambling Attitudes and Beliefs Survey items (GABS-7)
- Number of days binged on gambling (past 12 months) (BINGE)
- Perceived ability to control gambling (CONTROL)
- Number of venues where played EGMs (past 12 months) (NUMVEN)

Predictors in addition to LPM and High Success Loyalty Programs (HSLPs)[23] assumed to impact on the outcome variables and which are included in the final models consist of the following:

- Time (linear/non-linear)
- Gender
- Age
- Main activity (working/student/home duties vs. retired/unemployed)
- Household income
- Personal income
- Gambling frequency (when examining outcomes variables other than gambling frequency)
- PGSI score (when examining outcome variables other than PGSI score)
- Interactions between each of the above variables and TIME

Note that the estimates for Age and Gambling frequency represent 10-unit increments. Thus we discuss the association between an increase of 10 years in age and 10 additional occasions of gambling, on the outcome variables. Because time is most accurately included in the models as a discrete rather than continuous variable, this means that reported effects of predictor values are as at Time equals 1 (wave 2).

Missing data were examined and found to be minimal (i.e. generally less than 5%) with some exceptions. For repeat measures data with data missing at random (MAR), MM analysis will typically yield unbiased estimates (Raykov & Marcoulides, 2008).

[23] The definition of “Higher success” LPs was based on findings from the literature review regarding components of “more successful” loyalty programs. Attributes included are listed in the findings sub-section of the longitudinal analysis section of the report. In addition, a table explaining how the score was calculated is included in the Appendix.

Variable	N	Missing Data % - of total sample	% - of those asked
GAMBSPEND[a]	1087	28.2	0.4
GAMBTIME[a]	1504	39.9	15.9
GAMBFREQ	0	0.0	0.0
PGSI_Score[a]	1076	28.5	0.0
GABS_07[a]	1332	35.3	9.5
BINGE[a]	1132	30.0	2.1
CONTROL[a]	1122	29.8	1.7
NUMVEN[b]	1568	41.6	0.7
Gender	4	0.1	0.1
Age	43	1.1	1.1
Main activity	142	3.8	3.8
HH income	622	16.5	16.5
Personal income	617	16.4	16.4
LPM_Status[b]	1553	41.2	0.0
High Success LP[c]	2559	67.9	0.0

All continuous variables were mean-centred in order to address collinearity. Interaction variables (predictor var x TIME) were included in the models. Predictor variables were tested for multicollinearity using a Variable Inflation Factor threshold of 10 (Kutner et al, 2005). All predictor variables were examined to ensure they met assumptions required for analysis. Those variables violating the assumption of normality were transformed as necessary (Tabachnick and Fidell 2007). An examination of the histogram of the CONTROL variable showed that it had a Poisson distribution where the majority of responses were in the 1st or 3rd category. It was therefore decided to collapse the categories into low (1st or 2nd categories) and high (3rd category or higher).

Initial analyses were performed using IBM SPSS 22.0 statistical software. Mixed effects modelling was performed using Stata 12.1.

A note on correlation (or association) versus causation

Although the research questions posed for this study involve causation – i.e. do loyalty programs cause various behaviours and difficulties around gambling?" – survey methodology can only test for associations. However, by controlling for other variables thought to affect the outcome variables and with the temporal ordering of the independent and dependent variables (i.e. the hypothesised cause (LPM status or HSLP score) has occurred prior to the effect (e.g. PGSI score)), we have provided evidence supporting an argument of causation. We cannot be sure, however, that there is causation rather than simply correlation; we also cannot be sure that the causal direction does not go the other way, with the outcome variable causing LPM. Definitive establishment of causation would require a randomised controlled trial with people randomly assigned to LPM and non-LPM groups, something that is simply not possible to do for both practical and ethical reasons.

6.3 Sample demographics

Below is a table of sample demographics. As can be seen, as compared with the general population, wave 1 survey respondents were more female, older, and more likely to live in a non-metropolitan area. The relatively small percentage of respondents from WA is likely due to EGMs only being available in the single casino in that state, rather than also in clubs and pubs/hotels.

Data were not weighted because the population of people interested in playing EGMs is unknown. A complete list of descriptive results by wave is included in the Appendix.

Table 6.12: Demographics – Part 1

	Popn	Wave 1		Wave 2		Wave 3	
Gender	%	N	%	N	%	N	%
Male	49%	540	37%	434	37%	414	37%
Female	51%	921	63%	753	63%	703	63%
Age							
18-24 years	12%	93	6%	56	5%	43	4%
25-34 years	18%	193	13%	157	13%	117	10%
35-44 years	19%	219	15%	171	14%	158	14%
45-54 years	18%	314	21%	266	22%	239	21%
55-64 years	15%	319	22%	269	23%	271	24%
65+ years	18%	320	22%	267	22%	288	26%
Aboriginal/TSI							
Yes	3%	26	2%	14	1%	15	1%
No	98%	1423	97%	1170	98%	1098	98%
Highest Education							
<Year 12	29%	351	24%	261	22%	253	23%
Year 12	17%	262	18%	185	16%	173	15%
>Year 12	55%	841	57%	670	56%	682	61%
Main activity							
Work FT/PT	59%	809	55%	634	53%	605	54%
Home duties	32%	134	9%	112	9%	80	7%
Retired		365	25%	316	27%	309	28%
Unemployed	3%	49	3%	33	3%	44	4%
Other	6%	37	3%	42	4%	42	4%
Occupation							
Manager	13%	119	15%	101	16%	103	17%
Professional	22%	234	29%	191	30%	232	38%
Technicians and Trades Worker	14%	52	6%	41	6%	37	6%
Comm' and pers' services worker	10%	115	14%	66	10%	66	11%
Clerical and administrative worker	15%	147	18%	114	18%	82	14%
Sales worker	9%	65	8%	56	9%	40	7%
Machinery operators and drivers	7%	29	4%	24	4%	19	3%
Labourers	9%	48	6%	32	5%	22	4%
Other	1%	0	0%	9	1%	4	1%

Population statistics derived from Australian Bureau of Statistics 2011 Census of Population and Housing

Table 6.13: Demographics – Part 2

	Popn	Wave 1		Wave 2		Wave 3	
	%	N	%	N	%	N	%
Household income							
<$80K	59%	737	61%	635	64%	581	61%
$80K+	41%	467	39%	362	36%	365	39%
Personal Income							
<$80K	86%	1025	85%	844	85%	794	84%
$80K+	14%	186	15%	150	15%	153	16%
State/Territory							
NSW	33%	412	28%	335	29%	300	27%
VIC	26%	560	39%	462	39%	434	39%
SA	8%	109	8%	91	8%	91	8%
WA	11%	30	2%	26	2%	28	3%
TAS	2%	52	4%	46	4%	47	4%
NT	1%	21	1%	17	1%	16	1%
QLD	20%	245	17%	181	15%	176	16%
Metro/non-metro							
Metro	65%	740	51%	600	51%	563	50%
Non-metro	35%	708	48%	575	48%	546	49%
Played EGMs past 12 months							
Yes		973	67%	661	56%	582	52%
No		490	33%	527	44%	536	48%
Played EGMs past 3 months							
Yes		859	59%	540	45%	454	41%
No		604	41%	648	55%	664	59%
LP member							
Yes		524	36%	362	30%	324	29%
No		939	64%	826	70%	794	71%
PGSI category							
Non-gambler		539	48%	486	57%	408	57%
Low risk		241	22%	164	19%	139	19%
Moderate risk		220	20%	132	15%	116	16%
Problem gambler		115	10%	76	9%	57	8%

Population statistics derived from Australian Bureau of Statistics 2011 Census of Population and Housing

6.4 Findings

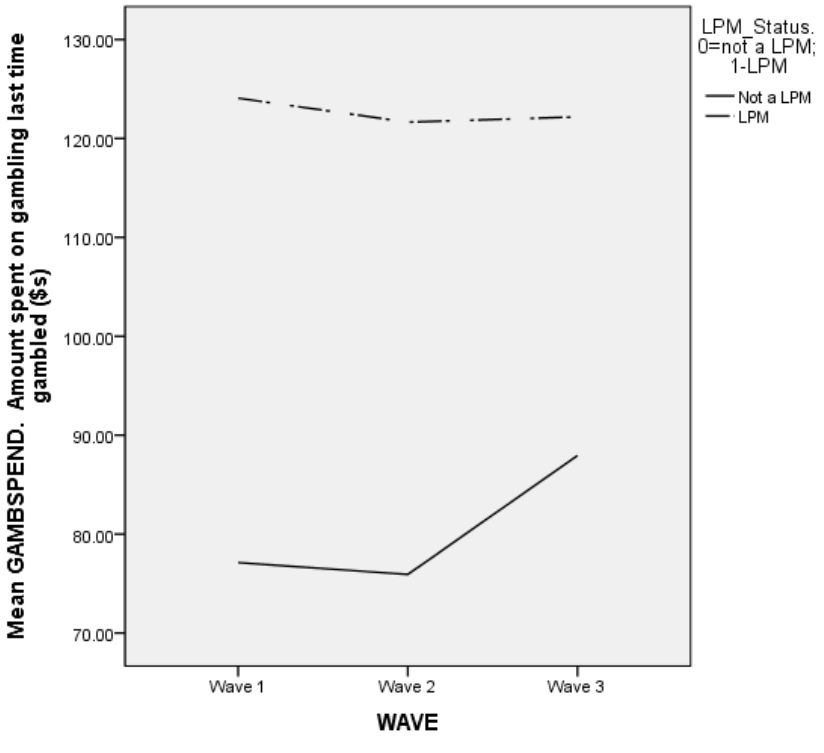
This section reports the findings from the longitudinal analysis of survey data. Additional details regarding these analyses are included in the Appendix. Tables of survey results, presented by wave and LPM status, are also included in an Appendix. Findings are discussed by research question. For each question, we first present a graph plotting LPMs against non-LPMs, or high HSLP against low HSLP, for the relevant outcome variable, without controlling for any other variables. We then present the results of the full model, which includes the effects of the time and predictor variables.

6.4.1 Do loyalty programs increase amount of money spent gambling?

Survey respondents who reported gambling in the prior 12 months were asked how much money they spent on gambling on the last occasion (GAMBSPEND).

A comparison of LPMs and non-LPMs, without controlling for any other variables, shows that LPMs consistently spent more than non-LPMs on last gambling occasion (refer to below figure). In each of the three waves, LPMs reported spending, on average, approximately $120 on gambling the last time they gambled, as compared with around $75 in waves 1 and 2 and $90 in wave 3 for those who were not LPMs.

Figure 6.1: Expenditure means in last gambling occasion by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects Poisson regression model. Estimates are thus incidence-rate ratios (IRRs).

The key finding is that **LPM status is significantly related to gambling expenditure**, controlling for the other variables. A person who is a loyalty program member spends on average 1.37 times more than a non-LPM (p< .001) per gambling occasion when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

Other variables that predict gambling expenditure include gender, age, main activity, personal income, PGSI score and gambling frequency. Controlling for the other predictor variables, women spend an average of 0.78 times less money gambling on a single occasion as compared with men (p = .001); as a person's age increases by 10 years they spend 0.84 times less money on gambling (p < 0.001); people who are unemployed or retired spend 1.18 times more than people who are working, studying or performing home duties as their main activity (p <.001); as people move up a personal income category they spend 1.08 times the amount on gambling (p < 0.001); as a person's PGSI score increases by one unit they spend 1.07 times the amount on gambling (p <.001); and as a person spends 10 more occasions per year gambling they spend 1.01 times the amount on gambling (p <.001).

Table 6.14: Estimates of Fixed Effects – Gambling Expenditure

Parameter	Estimate (IRR)	Std. Error	Sig.	95% Confidence Interval	
				Lower Bound	Upper Bound
Time	1.01	0.01	0.418	0.99	1.03
Gender	**0.78**	**0.06**	**0.001**	**0.67**	**0.90**
Age	**0.84**	**0.02**	**<0.001**	**0.80**	**0.88**
Main activity	**1.18**	**0.02**	**<0.001**	**1.13**	**1.23**
HH income	1.00	0.01	0.602	0.98	1.01
Personal income	**1.08**	**0.01**	**<0.001**	**1.06**	**1.09**
PGSI score	**1.07**	**0.00**	**<0.001**	**1.07**	**1.07**
Gambling freq	**1.01**	**0.00**	**<0.001**	**1.01**	**1.01**
LPM status	**1.37**	**0.02**	**<0.001**	**1.34**	**1.40**
Gender x Time	**0.87**	**0.01**	**<0.001**	**0.86**	**0.89**
Age x Time	0.99	0.00	0.071	0.99	1.00
Main activity x Time	**0.79**	**0.01**	**<0.001**	**0.77**	**0.81**
HH income x Time	**0.97**	**0.00**	**<0.001**	**0.96**	**0.98**
Pers income x Time	**1.04**	**0.00**	**<0.001**	**1.03**	**1.05**
PGSI score x Time	**0.98**	**0.00**	**<0.001**	**0.98**	**0.98**
Gambling freq x Time	**1.01**	**0.00**	**<0.001**	**1.01**	**1.01**
LPM status x Time	**1.16**	**0.01**	**<0.001**	**1.15**	**1.18**

Dependent Variable: GAMBSPEND: Amount spent on gambling last occasion ($s)

Table 6.15: Estimates of Random Effects – Gambling Expenditure

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	1.12	.027	1.06	1.17

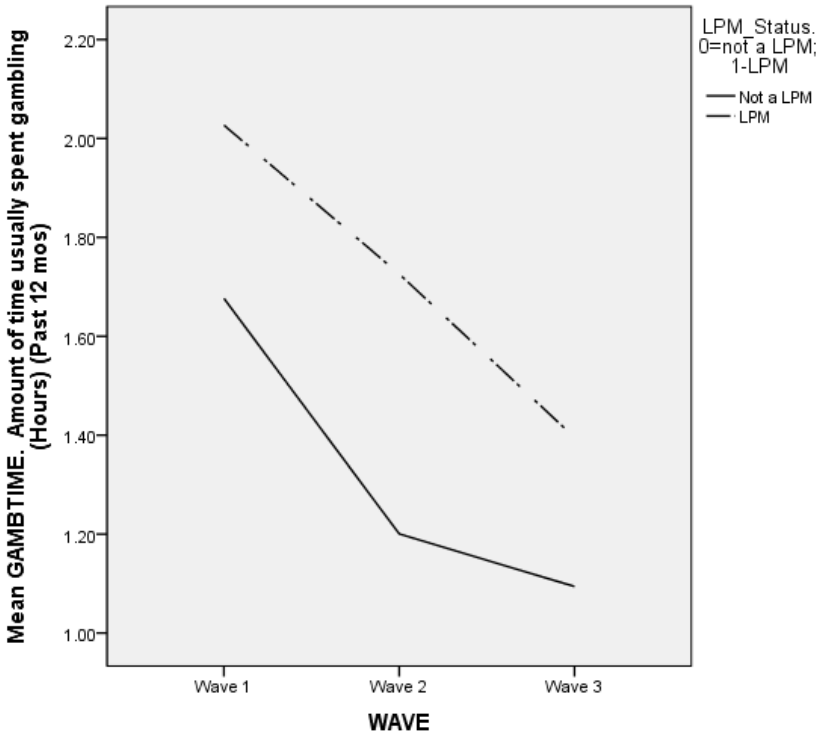
Dependent Variable: GAMBSPEND: Amount spent on gambling last occasion ($s)

6.4.2 Do loyalty programs increase amount of time spent gambling?

We next investigate whether LPM is associated with increased *time* spent gambling. Survey respondents who had gambled in the prior 12 months were asked how long they usually spend gambling on a given gambling occasion (GAMBTIME).

A comparison of LPMs and non-LPMs, without controlling for any other variables, shows that LPMs consistently reported spending more time gambling than did non-LPMs (refer to below figure). Reported time spent gambling decreased across waves for both LPMs and non-LPMs. In waves 1 and 3, this difference between LPMs and non-LPMs was approximately 0.3 hours, or 18 minutes; in wave two the gap was about 0.6 hours, or 36 minutes. LPMs' reported time spent gambling decreased from just over two hours in wave 1 to slightly under 1.8 hours (1 hour 48 min) in wave 2 to approximately 1.1 hours (1 hour 6 min) in wave 3. For non-LPMs, these figures were 1.5 hours (1 hour 30 min) in wave 1, 1.2 hours (1 hour 12 min) in wave 2 and 1.1 hours (1 hour 6 min) in wave 3. This general decrease across waves may be due to the higher survey attrition rates of heavier gamblers and those with higher PGSI scores.

Figure 6.2: Mean amount of time usually spent gambling by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects Poisson regression model. Estimates are thus IRRs.

The key finding is that **LPM status is significantly related to time spent gambling**, controlling for the other variables. A person who is a loyalty program member spends on average 1.23 times more hours gambling than does a non-LPM (p< .001) when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

Other variables that predict time spent gambling include **PGSI score and gambling frequency**. Controlling for the other predictor variables, as a person's PGSI score increases by one unit they spend 1.05 times the amount of time spent gambling (*p* <.001); and as a person spends 10 more occasions per year gambling they spend 1.01 times the amount of time spent gambling (*p* <.001).

Table 6.16: Estimates of Fixed Effects -- Time Spent Gambling

				95% Confidence Interval	
Parameter	**Estimate (IRR)**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	**0.80**	**0.06**	**0.001**	**0.69**	**0.92**
Gender	1.05	0.07	0.468	0.92	1.20
Age	1.04	0.03	0.110	0.99	1.09
Main activity	1.15	0.10	0.097	0.97	1.37
HH income	1.02	0.02	0.435	0.97	1.07
Personal income	1.04	0.03	0.123	0.99	1.10
PGSI score	**1.05**	**0.01**	**<0.001**	**1.03**	**1.06**
Gambling freq	**1.01**	**0.00**	**0.025**	**1.00**	**1.02**
LPM status	**1.23**	**0.07**	**<0.001**	**1.10**	**1.38**
Gender x Time	1.04	0.07	0.572	0.92	1.17
Age x Time	1.00	0.02	0.999	0.95	1.05
Main activity x Time	0.90	0.08	0.262	0.76	1.08
HH income x Time	0.97	0.02	0.207	0.92	1.02
Pers income x Time	1.05	0.03	0.063	1.00	1.11
PGSI score x Time	**1.01**	**0.01**	**0.016**	**1.00**	**1.03**
Gambling freq x Time	1.00	0.00	0.720	0.99	1.01
LP status x Time	1.01	0.06	0.837	0.90	1.14

Dependent Variable: GAMBTIME: Amount of time usually spent gambling past 12 mos. (hours)

Table 6.17: Estimates of Random Effects – Time Spent Gambling

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	0.56	.028	0.50	0.61

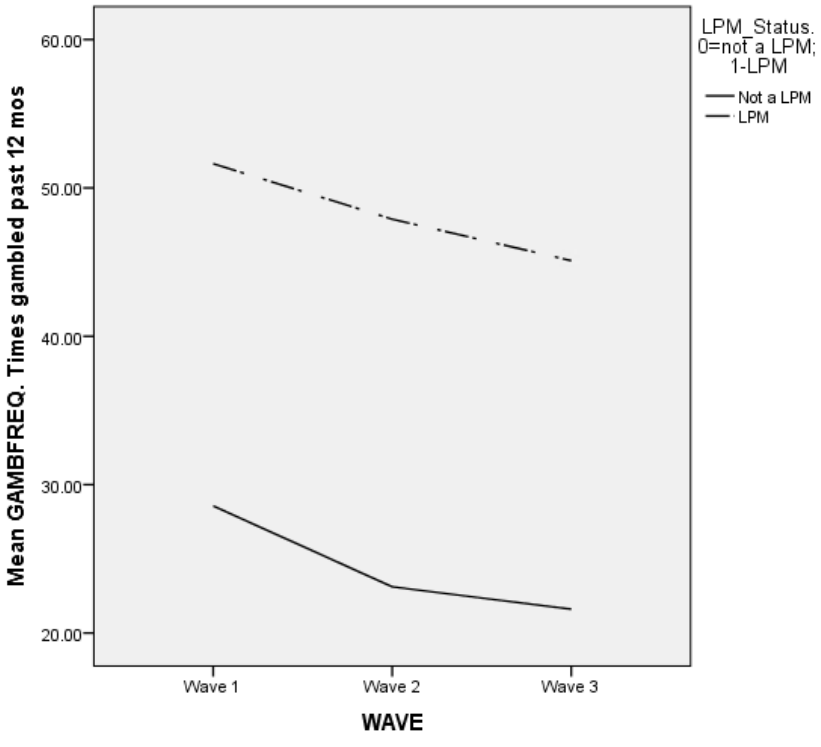
Dependent Variable: GAMBTIME: Amount of time usually spent gambling past 12 mos. (hours)

6.4.3 Do loyalty programs increase gambling frequency?

Thus far we have determined that loyalty programs are associated with both more money and time spent gambling, taking into account time, demographics, PGSI score, gambling frequency and interactions between time and the various predictor variables. Whereas the previous two models included gambling frequency as a predictor variable, we now posit gambling frequency as the outcome variable and examine the impact of LPM on gambling frequency. Respondents who had gambled in the previous 12 months were asked how often they usually gambled (GAMBFREQ).

The figure below shows the difference between LPMs and non-LPMs by wave in gambling frequency, without controlling for any other variables. We see that LPMs consistently reported gambling more often than did non-LPMs. On average, LPMs reported gambling slightly more than 50 times in the prior 12 months at wave 1, slightly fewer than 50 times at wave 2, and approximately 45 times in wave 3. For non-LPMs the frequencies were slightly fewer than 30 times at wave 1, and slightly more than 20 times at waves 2 and 3.

Figure 6.3: Mean times per year gambled past 12 months by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects Poisson regression model. Estimates are thus IRRs.

The key finding is that **LPM status is significantly related to gambling frequency**, controlling for the other variables. A person who is a loyalty program member gambles on average 1.27 times as frequently as a non-LPM (p< .001) when the effects of time, gender, age, main activity, household and personal income, PGSI score, and the interactions between these predictor variables and time are held constant (at the middle time-point).

Other variables that predict gambling frequency include **gender, age, household income, and PGSI score**. Controlling for the other predictor variables, women gamble 0.62 times the frequency of men (*p* <.001); as a person's age increases by 10 years they gamble 1.16 times as frequently (p < 0.001); as a person's household income moves up a category they gamble 1.15 times the frequency (p < 0.001); and as a person's PGSI score increases by one point they gamble 1.06 times the frequency (*p* <.001.

Table 6.18: Estimates of Fixed Effects – Gambling Frequency

				95% Confidence Interval	
Parameter	**Estimate (IRR)**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	**0.86**	**0.01**	**<0.001**	**0.83**	**0.88**
Gender	**0.62**	**0.05**	**<0.001**	**0.53**	**0.74**
Age	**1.16**	**0.03**	**<0.001**	**1.10**	**1.22**
Main activity	1.04	0.03	0.137	0.99	1.09
HH income	**1.15**	**0.01**	**<0.001**	**1.13**	**1.18**
Personal income	1.01	0.01	0.168	0.99	1.03
PGSI score	**1.06**	**0.00**	**<0.001**	**1.05**	**1.06**
LPM status	**1.27**	**0.03**	**<0.001**	**1.22**	**1.32**
Gender x Time	**0.97**	**0.01**	**0.017**	**0.95**	**0.99**
Age x Time	**1.04**	**0.00**	**<0.001**	**1.03**	**1.05**
Main activity x Time	**0.93**	**0.02**	**<0.001**	**0.90**	**0.96**
HH income x Time	1.00	0.01	0.764	0.99	1.01
Pers income x Time	1.00	0.01	0.405	0.98	1.01
PGSI score x Time	1.00	0.00	0.084	1.00	1.00
LPM status x Time	**1.09**	**0.02**	**<0.001**	**1.07**	**1.12**

Dependent Variable: GAMBFREQ: Times gambled past 12 mos.

Table 6.19: Estimates of Random Effects – Gambling Frequency

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	1.24	.032	1.18	1.30

Dependent Variable: GAMBFREQ: Times gambled past 12 mos.

6.4.4 Do loyalty programs result in increased risk of problem gambling?

It is possible that, although LPs are associated with increased money and time spent gambling, and gambling frequency, they are not associated with increased risk of problem gambling.

The survey instrument included two measures of difficulties around gambling. These questions were asked of all survey respondents who said they had gambled in the prior 12 months. The measures included:

- Seven items from the GABS-23 (Bouju et al., 2014) (designed to measure the incentive aspect of gambling) (GABS-7)
- Problem Gambling Severity Index (PGSI) (measures degree of problem gambling severity in the general population) (Ferris & Wynne, 2001)

GABS-7

The GABS-23 measures gambling-related beliefs, emotions and attitudes among problem and non-problem gamblers (Breen & Zuckerman, 1999). Gamblers with higher GABS scores do not see gambling as a social and leisure activity and place a great deal of emphasis on luck and "magical thinking" when gambling (Bouju et al., 2014). Seven questions from the scale were included in the survey in order to estimate the evolution of the incentive aspect of gambling and thus attempt to measure difficulties around gambling that might not be captured by the PGSI, which is designed to measure problem gambling(GABS-7) [24].

The following questions were asked of all respondents who had gambled in the prior 12 months. In each case respondents were asked whether they strongly agreed, agreed, disagreed, or strongly disagreed with each statement.

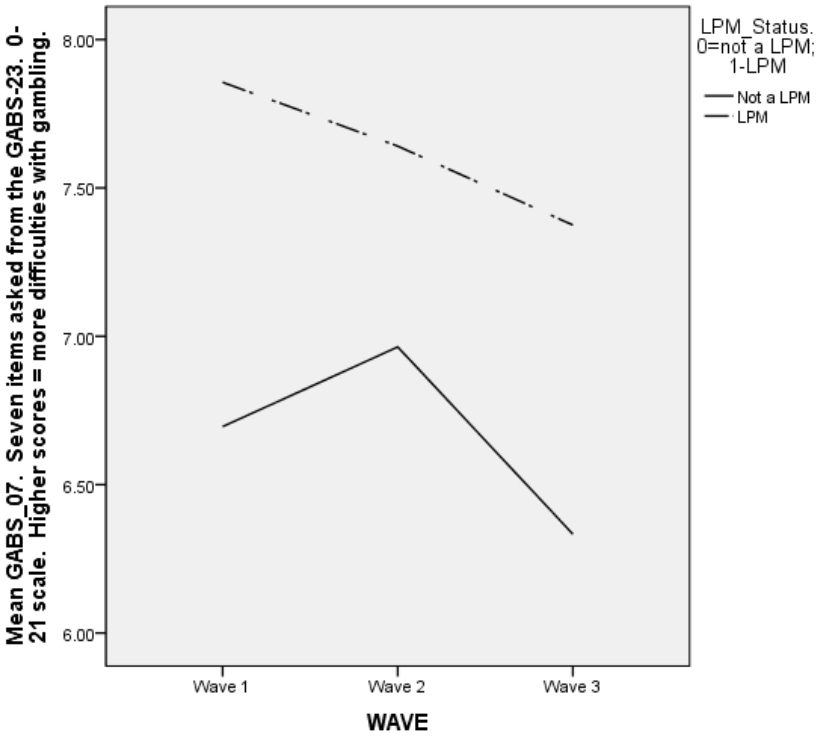
- Gambling makes me feel really alive.
- I don't like to quit when I'm losing.
- If you have never experienced the excitement of making a big bet, you have never really lived.
- I have carried a lucky charm when I gambled.
- I feel angry when I lose at gambling.
- If I were feeling down, gambling would probably pick me up.
- If I have lost my bets recently, my luck is bound to change.

Scores range from 0 to 21 with higher scores indicating greater difficulties around gambling. GABS-7 is treated as a continuous variable for purposes of analyses (R. H. Heck, personal communication, August 21, 2015).

[24] These seven were chosen because including the full 23-item scale would have made the survey too long; these items fall within the subscales, 'emotions', 'chasing' and 'luck' (Bouju, et al. 2013) deemed most relevant for the research question; and because these seven questions loaded highly on the single underlying factor (Breen & Zuckerman 1999).

The graph below presents a comparison of LPMs and non-LPMs on GABS-7 across waves, without controlling for any other variables. This figure shows that LPMs consistently had higher scores on the GABS-7 than did non-LPMs. The gap is approximately 1.25 points in waves 1 and 3 and approximately 0.75 points in wave 2, on the 0 to 21 scale.

Figure 6.4: GABS-7 score by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects linear regression model. Estimates are thus coefficients.

The key finding is that **LPM status is significantly related to GABS-7** score, controlling for the other variables. A person who is a loyalty program member has on average a GABS-7 score 0.50 points higher than someone who is not a loyalty program member when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

Other variables that predict GABS-7 score include **PGSI score and gambling frequency**. Controlling for the other predictor variables, as a person's PGSI score increases by one point their GABS-7 score increases 0.37 points (p <.001); and as a person spends ten more occasions per year gambling their GABS-7 score increases 0.03 points (p =.020).

Table 6.20: Estimates of Fixed Effects – GABS-7 Scores

				95% Confidence Interval	
Parameter	**Coef.**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	-0.19	0.15	0.211	-0.49	0.11
Gender	-0.29	0.18	0.115	-0.65	0.07
Age	-0.03	0.06	0.641	-0.15	0.09
Main activity	0.01	0.22	0.958	-0.41	0.44
HH income	-0.03	0.06	0.638	-0.14	0.09
Personal income	-0.01	0.06	0.898	-0.14	0.12
PGSI score	**0.37**	**0.02**	**<0.001**	**0.33**	**0.40**
Gambling freq	**0.03**	**0.01**	**0.020**	**0.01**	**0.06**
LPM status	**0.50**	**0.15**	**0.001**	**0.21**	**0.78**
Gender x Time	0.15	0.14	0.286	-0.13	0.43
Age x Time	0.02	0.05	0.650	-0.08	0.12
Main activity x Time	0.21	0.20	0.282	-0.18	0.61
HH income x Time	-0.03	0.05	0.607	-0.13	0.08
Pers income x Time	0.06	0.06	0.321	-0.06	0.17
PGSI x Time	0.01	0.02	0.526	-0.02	0.04
Gambling freq x Time	-0.01	0.01	0.574	-0.03	0.02
LPM status x Time	-0.08	0.14	0.558	-0.35	0.19

Dependent Variable: GABS-7

Table 6.21: Estimates of Random Effects – GABS-7 Scores

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	1.95	.083	1.79	2.12

Dependent Variable: GABS-7

PGSI score

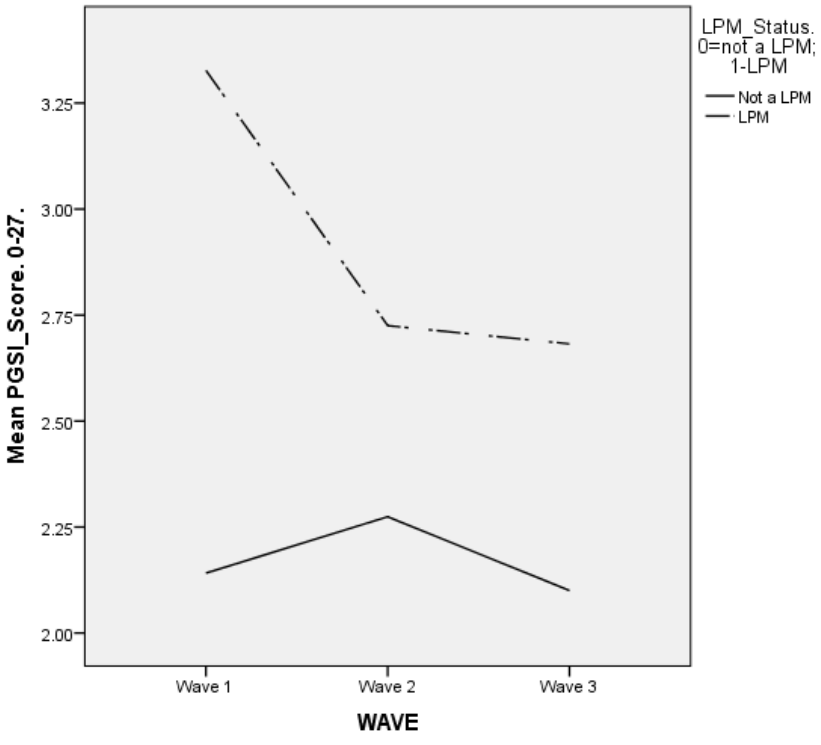
The PGSI comprises a subset of items from the Canadian Problem Gambling Inventory (CPGI). This instrument was constructed specifically to measure problem gambling in the general population (as opposed to in a clinical sample). The PGSI consists of nine items, four of which assess problem gambling behaviours and five that assess adverse consequences of gambling. The PGSI is generally regarded as a valid and reliable measure (Holtgraves, 2009; Currie, Hodgins, & Casey, 2013; Wynne, 2003) and has been widely used in Australian gambling research (Storer, Abott, & Stubs, 2009; Gainsbury et al., 2014). Scores range from 0 to 27 with higher scores indicating greater risk of problem gambling.

From the PGSI, the following categories of risk have been defined (Ferris & Wynne, 2001):

- Score of 0 = Non-problem gambling
- Score of 1-2 = Low level of problems with few or no identified negative consequences (“low-risk”)
- Score of 3-7 = Moderate risk of problems leading to some negative consequences (“moderate-risk”)
- Score of 8-27 = Problem gambling with negative consequences and a possible loss of control (“problem gambling” or PG)

Comparing PGSI scores of LPMs and non-LPMs over time without controlling for any other variables indicates that loyalty program members have higher PGSI scores – on average approximately 3.3 versus 2.1 in wave 1, 2.7 versus 2.3 in wave 2 and 2.7 versus 2.1 in wave 3. These results place LPMs on average between the “low” and “moderate-risk” PGSI categories, as compared with the high end of the “low-risk” category for non-LPMs.

Figure 6.5: PGSI score by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects logistic regression model. Estimates are thus odds-ratios. The outcome variable (PGSI_dichot) consists of two categories: scores of 0 to 2 on the PGSI (representing non-problem and low-risk gambling) and 3 to 27 (representing moderate-risk and problem gambling). This variable will be referred to as “PGSI category”.

The key finding is that **LPM status is significantly related to PGSI category**, controlling for the other variables. A person who is a loyalty program member has 2.68 times the odds of being a moderate-risk or problem gambler as compared with a non-LPM (*p*= .001) when the effects of time, gender, age, main activity, household and personal income, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point)[25].

Other variables that predict PGSI category include **age and gambling frequency**. Controlling for the other predictor variables, as a person's age increases by ten years they have 0.51 times the odds of being a moderate-risk or problem gambler (p < 0.001); and as a person spends ten more occasions per year gambling they have 1.29 times the odds of being a moderate-risk or problem gambler (*p* <.001).

Table 6.22: Estimates of Fixed Effects – PGSI_dichot

				95% Confidence Interval	
Parameter	**Odds Ratio**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	0.99	0.30	0.969	0.55	1.78
Gender	0.77	0.28	0.469	0.38	1.56
Age	**0.51**	**0.07**	**<0.001**	**0.39**	**0.65**
Main activity	0.89	0.37	0.775	0.39	2.00
HH income	0.83	0.09	0.088	0.67	1.03
Personal income	0.96	0.12	0.772	0.76	1.23
Gambling freq	**1.29**	**0.04**	**<0.001**	**1.21**	**1.37**
LPM status	**2.68**	**0.79**	**0.001**	**1.51**	**4.76**
Gender x Time	0.70	0.19	0.196	0.41	1.20
Age x Time	1.07	0.10	0.492	0.89	1.29
Main activity x Time	0.90	0.34	0.780	0.43	1.90
HH income x Time	1.03	0.10	0.740	0.86	1.24
Pers income x Time	0.89	0.10	0.266	0.72	1.10
LPM status x Time	0.89	0.23	0.650	0.53	1.48

Dependent Variable: GAMBFREQ: Times gambled past 12 mos.

Note: Gambling freq x Time omitted from model due to lack of model convergence

Table 6.23: Estimates of Random Effects – PGSI_dichot

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	3.42	.265	2.94	3.98

Dependent Variable: PGSI_dichot (0-2; 3-27)

[25] Note that the interaction variable, gambling freq x Time has been omitted from the model. This was due to a lack of model convergence when this variable was included.

6.4.5 Do loyalty programs result in reduced feelings of control around gambling?

Another potential impact of loyalty programs is that they result in reduced feelings of control around gambling. Despite intentions to limit gambling, the incentive provided by LPs to increase points or attain rewards the more one gambles may override these good intentions.

Survey respondents who had gambled within the prior 12 months were asked several questions specifically about control around gambling:

- For each statement, please tell me if you strongly agree, agree, disagree, or strongly disagree: I could stop gambling for weeks without feeling the need to gamble; I could cut down easily on my gambling[26]
- On how many days in the past 12 months did you **binge on gambling** – that is, spend a significantly larger than usual amount in a shorter than usual period of time?[27]

[26] These questions were developed through discussions with our problem gambling topic expert, Dr Damien Brevers, and asked along with the seven items from the GABS-23.
[27] This question is from the Victorian Gambling Study questionnaire, Q.17_10 (State of Victoria, Department of Justice 2011).

Ability to control gambling

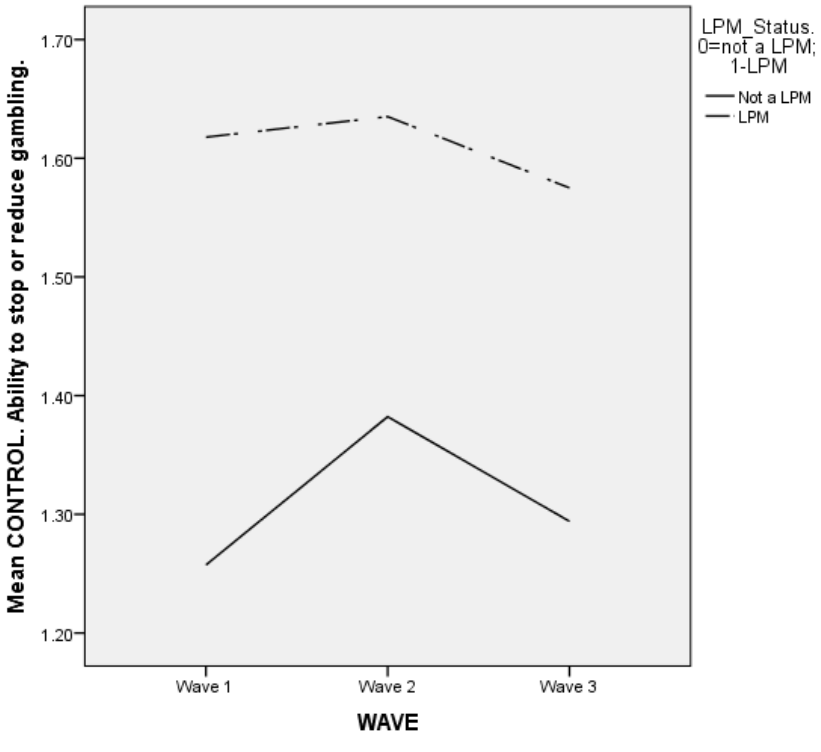
Respondents who had gambled in the prior 12 months were asked the extent to which they agreed or disagreed with the following two statements:

- I could stop gambling for weeks without feeling the need to gamble
- I could cut down easily on my gambling

Responses to the questions were combined to create a scale ranging from 0 to 6, with higher scores indicating greater difficulties (i.e. less belief in an ability to control gambling).

The below figure presents the difference in scores between LPMs and non-LPMs across waves. The gap is approximately 0.35 points in wave 1, decreases slightly in wave 2, and then increases somewhat in wave 3. LPMs had scores of approximately 1.62, 1.65 and 1.57 across the three waves, compared with scores of 1.25, 1.38 and 1.30 for non-LPMs.

Figure 6.6: CONTROL score by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects logistic regression model. Estimates are thus odds-ratios. The outcome variable (CONTROL_dichot) consists of two categories: scores of 0 to 2, and 3 to 6; the second category thus represents disagreement with at least one of the two questions about ability to control gambling. We will refer to the first category as the "more control" category, and the second category as the "less control" category.

The key finding is that **LPM status is not significantly related to feelings of ability to control one's gambling**, holding the other variables constant. A person who is a loyalty program member has 0.98 times the odds of having less control as compared with a non-LPM (p =.930) when the effects of time, gender, age, main activity, household and personal income, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

Other variables that predict less control, besides time, include **age, PGSI score and gambling frequency**. Holding the other predictor variables constant, as a person's age increases by ten years they have 1.30 times the odds of having less control (p =.018); as a person's PGSI score increases by one point they have 1.54 times the odds of having less control (p <.001); and as a person spends ten more occasions per year gambling they have 1.08 the odds of having less control (p <.001).

Table 6.24: Model 4.2: Fixed Effects (CONTROL_dichot)

				95% Confidence Interval	
Parameter	**Odds Ratio**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	**1.81**	**0.58**	**0.063**	**0.97**	**3.39**
Gender	0.81	0.24	0.474	0.45	1.45
Age	**1.30**	**0.14**	**0.018**	**1.04**	**1.61**
Main activity	0.96	0.37	0.913	0.45	2.03
HH income	0.95	0.11	0.629	0.76	1.18
Personal income	1.17	0.15	0.211	0.92	1.49
PGSI score	**1.54**	**0.06**	**<0.001**	**1.42**	**1.67**
Gambling freq	**1.08**	**0.02**	**<0.001**	**1.04**	**1.13**
LPM status	0.98	0.26	0.930	0.58	1.65
Gender x Time	0.65	0.19	0.138	0.37	1.15
Age x Time	1.15	0.12	0.195	0.93	1.41
Main activity x Time	0.79	0.32	0.556	0.35	1.75
HH income x Time	1.00	0.11	0.972	0.80	1.25
Pers income x Time	1.01	0.13	0.925	0.79	1.29
PGSI score x Time	1.02	0.03	0.615	0.96	1.08
Gambling freq x Time	1.01	0.02	0.668	0.97	1.05
LPM status x Time	0.61	0.18	0.089	0.35	1.08

Dependent variable: CONTROL. Ability to stop or reduce gambling

Table 6.25: Estimates of Random Effects – CONTROL

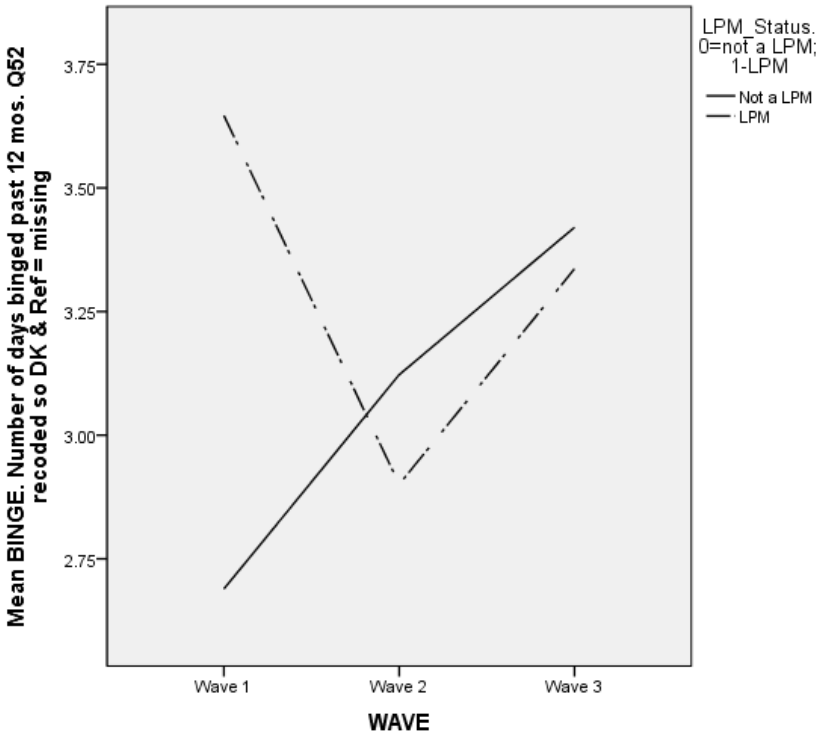
Parameter	Estimate	Std. Error	95% Confidence Interval	
			Lower Bound	Upper Bound
Intercept	1.84	.292	1.34	2.51

Dependent variable: CONTROL. Ability to stop or reduce gambling

Binge gambling

We first examine the association between LPM and number of days binged on gambling. The figure below is a summary of difference across waves in binge gambling between LPMs and non-LPMs. The figure shows that non-LPMs report fewer days of binge gambling at wave 1 as compared with LPMs – about 2.65 days in the prior 12 months versus about 3.65 days, respectively. However, in waves 2 and 3 the two groups are almost identical, with around 3 days binge gambling in wave 2 and 3.4 days in wave 3. Part of the reason for this lack of difference in waves 2 and 3 may have to do with the higher attrition rate of problem gamblers from wave 1 to wave 2.

Figure 6.7: Mean number of days binged past 12 months by LPM status



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects logistic regression model. Estimates are thus odds-ratios. The outcome variable (BINGE) consists of two categories: 0 days of bingeing in past 12 months and 1 or more days of bingeing in past 12 months.

The key finding is that **a person who is a loyalty program member has 1.33 times the odds (at the middle time-point) of bingeing on gambling**, controlling for the other variables, **but this associations does not reach our established threshold for statistical significance** (*p* =.176).

Other variables that predict bingeing include **personal income, PGSI score and gambling frequency**. Controlling for the other predictor variables, as a person's personal income increases by one category they have 1.20 times the odds of bingeing (*p* =.046)*;* as a person's PGSI score increases by one point they have 1.89 times the odds of bingeing (*p* <.001); and as a person spends 10 more occasions per year gambling they have 1.04 the odds of bingeing (*p* <.001).

Table 6.26: Estimates of Fixed Effects – Days Binged

				95% Confidence Interval	
Parameter	**Odds Ratio**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	0.73	0.18	0.207	0.45	1.19
Gender	0.74	0.17	0.194	0.47	1.17
Age	0.93	0.08	0.379	0.79	1.09
Main activity	0.93	0.29	0.817	0.51	1.70
HH income	0.98	0.08	0.755	0.84	1.14
Personal income	**1.20**	**0.11**	**0.046**	**1.00**	**1.43**
PGSI score	**1.89**	**0.10**	**<0.001**	**1.70**	**2.11**
Gambling freq	**1.04**	**0.02**	**0.042**	**1.00**	**1.08**
LPM status	1.33	0.28	0.176	0.88	2.00
Gender x Time	1.31	0.30	0.241	0.84	2.05
Age x Time	**1.21**	**0.10**	**0.021**	**1.03**	**1.42**
Main activity x Time	1.12	0.36	0.716	0.60	2.11
HH income x Time	1.01	0.08	0.923	0.86	1.18
Pers income x Time	1.02	0.09	0.818	0.85	1.22
PGSI x Time	**1.11**	**0.05**	**0.021**	**1.02**	**1.21**
Gambling freq x Time	0.97	0.02	0.165	0.93	1.01
LPM status x Time	1.06	0.23	0.799	0.69	1.63

Dependent Variable: BINGE: Days binged on gambling past 12 mos.

Table 6.27: Estimates of Random Effects – Days Binged

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	1.55	.225	1.16	2.06

Dependent Variable: BINGE: Days binged on gambling past 12 mos.

6.4.6 Do loyalty programs reward "loyalty" or create "incentive"?

LPs may increase people's venue loyalty (i.e. gamblers visit venues where they hold LPMs rather than venues where they do not). They may also create incentive (i.e. encourage gamblers to gamble more money and/or gamble for longer than they would without a membership). It is also possible that LPs induce both – gamblers visit venues where they hold loyalty programs more than they would otherwise *and also* spend more money or time gambling in total than they would otherwise. We have already established that LPs are associated with "incentive" – that LPMs spend more money and time gambling than do non-LPMs. Next we examine whether LPs are also associated with venue "loyalty".

In the survey, we ask people who have played EGMs within the past 12 months at how many different venues they played EGMs; we also ask them at how many venues they hold LPMs. People who are "perfectly loyal" should play EGMs at the same number of venues where they hold LPMs. We can therefore calculate a "loyalty score" for respondents who are members of at least one LP. The table below shows that mean loyalty score among LPMs is 0.58; this equates approximately to being a LPM at three venues but playing EGMs at five venues. Over one-third of LPM survey respondents (34.7%) had a loyalty score of 1.0, indicating perfect loyalty. These perfectly loyal respondents reported playing EGMs at between 1 and 60 venues in the prior 12 months (data not shown).

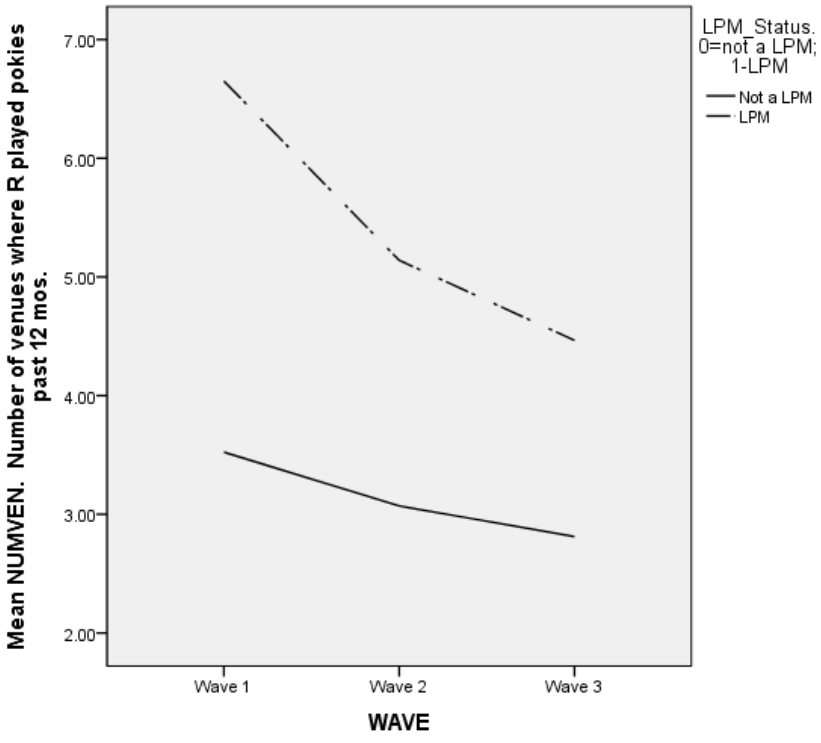
Table 6.28: Venue loyalty score (means) at each wave - LPMs

					95% Confidence Interval for Mean	
Wave	**N**	**Mean**	**Std. Deviation**	**Std. Error**	**Lower Bound**	**Upper Bound**
1	523	0.55	0.35	0.02	0.02	1.00
2	357	0.61	0.34	0.02	0.01	1.00
3	320	0.60	0.34	0.02	0.02	1.00
Total	1200	0.58	0.34	0.01	0.01	1.00

For people who are not LPMs, however, we cannot calculate a "loyalty score" and therefore this statistic cannot be used to compare LPMs and non-LPMs. However, if indeed LPM induces venue loyalty, we would expect that, all else being equal, LPMs should play EGMs at fewer venues than do non-LPMs.

We first present a comparison of average number of venues where respondents played EGMs by LPM status, without controlling for other factors. It appears that it is LPMs, rather than non-members, who play EGMs at a greater number of venues. From the figure below we see that LPMs play EGMs on average at slightly fewer than seven venues at wave 1, approximately five venues at wave 2, and between four and five venues at wave 3. In comparison, the number of venues for non-LPMs are between three and four, three, and slightly fewer than three venues, across the three waves.

Figure 6.8: Mean number of venues played pokies past 12 months by LPM status



However, this result may be due to the fact that LPMs gamble more than do non-LPMs. We therefore include all of the predictor variables in the model, including both gambling frequency and PGSI score. Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects logistic regression model. Estimates are thus odds-ratios. The outcome variable, NUMVEN, consists of two categories: 0 to 1 venues, and 2 or more venues.

The key finding is that LPM status is significantly related to number of venues ($p < .001$), but in the *opposite direction* than expected. **Rather than being associated with a smaller number of venues where one plays EGMs, being a member of a LP appears to be associated with a larger number of venues,** even taking into account gambling frequency and the other predictor variables. A person who is a loyalty program member has 2.67 times the odds (at the middle time-point) of playing the pokies at more than one venue as compared with a non-LPM, controlling for the other variables.

Other variables that predict playing at more than one venue include **age, PGSI score and gambling frequency**. Controlling for the other predictor variables, as a person's age increases by 10 years they have 0.83 times the odds of playing EGMs at more than one venue ($p = .017$); as a person's PGSI score increases by one point they have 1.12 times the odds of playing at more than one venue ($p < .001$); and as a person spends 10 more occasions per year gambling they have 1.09 the odds of playing at more than one venue ($p < .001$).

Table 6.29: Estimates of Fixed Effects – Number of Venues

				95% Confidence Interval	
Parameter	**Odds Ratio**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	1.05	0.21	0.819	0.71	1.55
Gender	0.91	0.19	0.654	0.60	1.37
Age	**0.83**	**0.06**	**0.017**	**0.72**	**0.97**
Main activity	0.92	0.24	0.761	0.55	1.54
HH income	1.02	0.07	0.819	0.89	1.16
Personal income	1.03	0.08	0.703	0.89	1.20
PGSI score	**1.12**	**0.03**	**<0.001**	**1.06**	**1.19**
Gambling freq	**1.09**	**0.02**	**<0.001**	**1.04**	**1.14**
LPM status	**2.67**	**0.50**	**<0.001**	**1.86**	**3.85**
Gender x Time	0.89	0.17	0.557	0.61	1.31
Age x Time	1.03	0.07	0.700	0.89	1.18
Main activity x Time	1.32	0.35	0.302	0.78	2.21
HH income x Time	1.02	0.07	0.749	0.89	1.17
Pers income x Time	0.96	0.07	0.569	0.82	1.11
PGSI score x Time	1.00	0.03	0.917	0.95	1.06
Gambling freq x Time	0.98	0.02	0.485	0.94	1.03
LPM status x Time	0.76	0.14	0.141	0.53	1.09

Dependent variable: NUMVEN: Number of venues where played pokies past 12 mos.

Table 6.30: Estimates of Random Effects – Number of Venues

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	1.71	.181	1.39	2.11

Dependent variable: NUMVEN: Number of venues where played pokies past 12 mos.

6.4.7 Do “high success” loyalty programs result in more money spent gambling?

HSLPs

It is likely that some types of gambling loyalty programs have greater impact on gambling behaviours than others. Based on the findings from the literature review, we know that particular components of loyalty programs may be more “successful” than others. We now investigate whether these “higher success” loyalty programs are associated with higher levels of spending, more time spent gambling, and increased risk of problem gambling. Respondents included in this analysis consist of those who are LPMs.

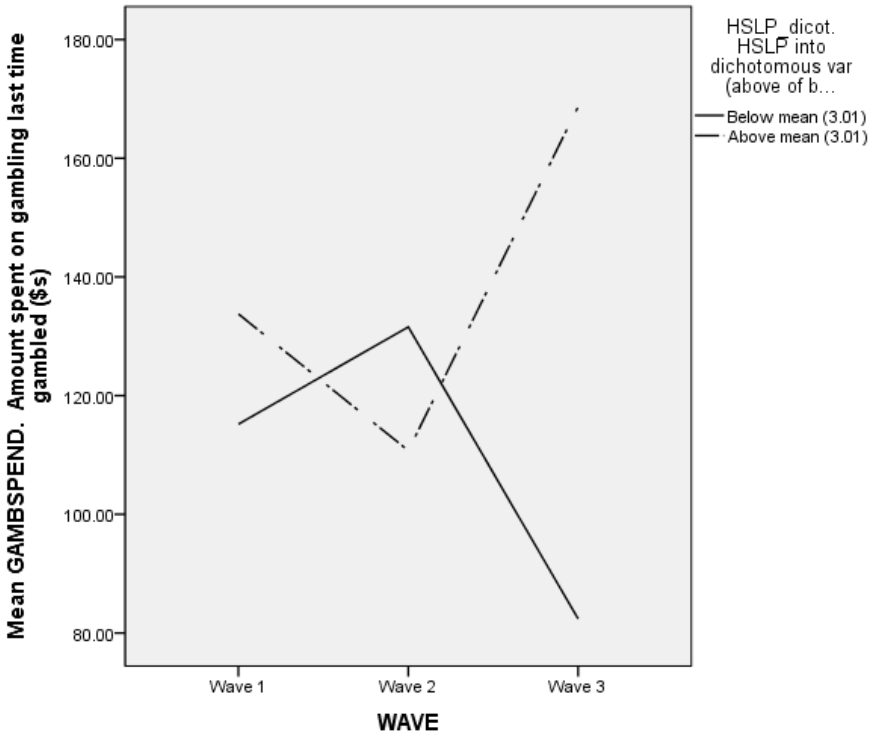
A HSLP variable was computed from survey questions asking about various components of participants’ LPs. Respondents who were members of more than one LP were asked about the one they use most to play EGMs. Details of this calculation are included in the Appendix. HSLP scores range from 0 to 8, with higher scores indicating more “successful” LPs.

“Higher success” LPs included the following attributes:

- When signed up, received information on how to get points; how many points you need to get rewards; and what kinds of rewards you could get
- When signed up, received both points and other rewards right away
- Receive communications connected to the loyalty program at least monthly
- These communications include a summary of points or tier level; coupons; information about special deals on meals or other non-gambling activities; special deal on gambling (e.g. extra points; additional cash back); chance to win prize draws or information about prize draws; and information about special events or other events at the venue
- LP has tiers
- LP involves accruing points which can be turned in for rewards
- LP includes the following types of rewards: food or meals; non-alcoholic drinks; alcoholic drinks; cash, gambling credits; gift cards; prizes; venue shop/merchandise; entertainment; accommodation; special treatment by staff; free or discounted parking; and something else (specified by respondent)

In order to compare “low success” LPs with “high success” programs on the outcome variables of interest, scores below the mean HSLP score (3.01) were assigned to the “low” group and those above the mean were assigned to the “high” group.[28] Below is a figure showing average gambling expenditure across waves for these two groups. The results are interesting if somewhat difficult to explain. At wave 1, gambling expenditure was somewhat higher for people with “high success” LPs – about $135 spent on last gambling occasion as compared with approximately $115 for those belonging to a “low success” LP. In wave 2, however, these positions reversed. In wave 3 they reversed again, with the “high” group spending around $170 and the “low” group about $80.

Figure 6.9: Amount spent on gambling on last gambling occasion by HSLP



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects Poisson regression model. Estimates are thus IRRs.

The key finding is that **being a member of a “higher success” LP does not appear to greatly increase the odds of spending more money on a single gambling occasion**, controlling for the other variables. As a person’s HSLP score moves up one point, they spends on average 0.99 times the amount on gambling (p= .005) per gambling occasion when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point). Although the test of significance meets our threshold, the size of the IRR is very close to 1.0 and thus there appears to be little substantive association.

[28] No score was exactly 3.01.

All of the other predictor variables included in the model are also associated with amount spent gambling (p <.05). Those of substantive significance, other than time, include **gender, age, main activity, household income and PGSI score**. Controlling for the other predictor variables, which now include HSLP instead of LP status, women spend an average of 0.63 times less money gambling on a single occasion as compared with men (p <.001); as a person's age increases by 10 years they spend 0.86 times less money on gambling (p < 0.001); people who are unemployed or retired spend 0.86 times less than people whose main activity is working, studying or performing home duties (p <.001); as people's households move up an income category they spend 0.87 times less money gambling (p < 0.001); and as a person's PGSI score increases by one point they spend 1.14 times more money gambling (p <.001).

Table 6.31: Estimates of Fixed Effects – Gambling Expenditure and Impact of HSLP

Parameter	Estimate (IRR)	Std. Error	Sig.	95% Confidence Interval	
				Lower Bound	Upper Bound
Time	**1.16**	**0.01**	**<0.001**	**1.13**	**1.18**
Gender	**0.63**	**0.07**	**<0.001**	**0.51**	**0.77**
Age	**0.86**	**0.03**	**<0.001**	**0.81**	**0.92**
Main activity	**0.86**	**0.03**	**<0.001**	**0.80**	**0.92**
HH income	**0.87**	**0.01**	**<0.001**	**0.86**	**0.89**
Personal income	**0.98**	**0.01**	**0.006**	**0.96**	**0.99**
PGSI score	**1.14**	**0.00**	**<0.001**	**1.14**	**1.15**
Gambling freq	**1.02**	**0.00**	**<0.001**	**1.02**	**1.02**
HSLP	**0.99**	**0.00**	**0.005**	**0.98**	**1.00**
Gender x Time	**0.95**	**0.01**	**<0.001**	**0.93**	**0.97**
Age x Time	**0.97**	**0.00**	**<0.001**	**0.96**	**0.98**
Main activity x Time	**0.72**	**0.01**	**<0.001**	**0.70**	**0.75**
HH income x Time	**0.93**	**0.00**	**<0.001**	**0.92**	**0.94**
Pers income x Time	**1.07**	**0.01**	**<0.001**	**1.06**	**1.08**
PGSI score x Time	**0.98**	**0.00**	**<0.001**	**0.98**	**0.99**
Gambling freq x Time	**1.02**	**0.00**	**<0.001**	**1.01**	**1.02**
HSLP x Time	**0.97**	**0.00**	**<0.001**	**0.97**	**0.98**

Dependent Variable: GAMBSPEND: Amount spent on gambling last occasion ($s)

Table 6.32: Estimates of Random Effects – Gambling Expenditure and Impact of HSLP

Parameter	Estimate	Std. Error	95% Confidence Interval	
			Lower Bound	Upper Bound
Intercept	1.18	.038	1.11	1.26

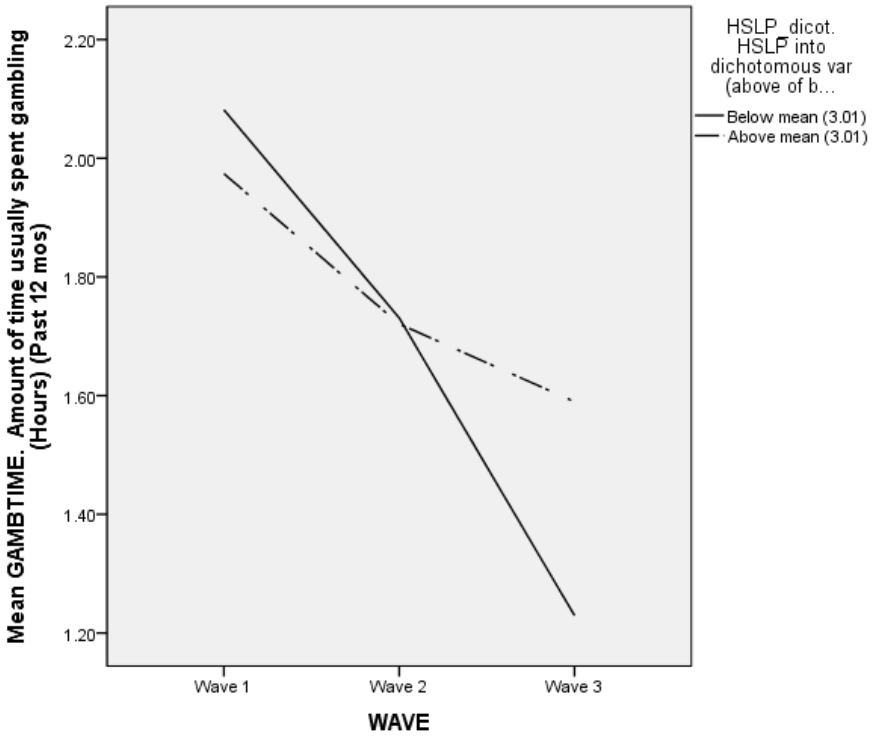
Dependent Variable: GAMBSPEND: Amount spent on gambling last occasion ($s)

6.4.8 Do “high success” loyalty programs result in more time spent gambling?

We next turn to the question of whether “high success” LPs are associated with more time spent gambling. The figure below comparing “low success” LPs with “high success” programs on time spent gambling are again interesting if somewhat unexpected.

At wave 1, time usually spent gambling was actually slightly higher for people belonging to “low success” LPs – about 2.1 hours (2 hours 6 min) compared with just under 2 hours for the respondents belonging to a “low success” LP. In wave 2 the lines cross so that people who belong to “high success” and “low success” LPs spend about the same amount of time gambling (approximately 1.75 hours, or 1 hour 45 min). In wave 3, however, respondents who below to “high success” LPs report a higher average time spent gambling as compared with those who belong to “low success” LPs – around 1.6 hours (1 hour 36 min) as compared with about 1.2 hours (1 hour 12 min), although both figures have dropped from prior waves.

Figure 6.10: Amount of time usually spent gambling by HSLP



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects Poisson regression model. Estimates are thus IRRs.

The key finding is that **being a member of a "higher success" LP is significantly associated with time spent gambling**, controlling for the other variables. As a person's HSLP score moves up one point, they spend on average 1.05 times the amount of time gambling (p =.044) when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

The other variable (other than time) that predicts amount of time spent gambling is **PGSI score**. Controlling for the other predictor variables, as a person's PGSI score increases by one point they spend 1.04 times the amount of time spent gambling (p <.001).

Table 6.33: Estimates of Fixed Effects – Time Spent Gambling and Impact of HSLP

				95% Confidence Interval	
Parameter	**Estimate (IRR)**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	**0.75**	**0.06**	**0.001**	**0.64**	**0.88**
Gender	1.14	0.09	0.116	0.97	1.34
Age	1.06	0.03	0.069	1.00	1.12
Main activity	1.13	0.13	0.273	0.91	1.40
HH income	1.01	0.03	0.732	0.95	1.07
Personal income	1.05	0.03	0.109	0.99	1.12
PGSI score	**1.04**	**0.01**	**<0.001**	**1.03**	**1.06**
Gambling freq	1.00	0.01	0.411	0.99	1.01
HSLP	**1.05**	**0.03**	**0.044**	**1.00**	**1.10**
Gender x Time	1.06	0.09	0.492	0.90	1.24
Age x Time	0.98	0.03	0.495	0.92	1.04
Main activity x Time	0.96	0.11	0.754	0.77	1.21
HH income x Time	0.95	0.03	0.124	0.89	1.01
Pers income x Time	**1.08**	**0.04**	**0.023**	**1.01**	**1.16**
PGSI score x Time	**1.02**	**0.01**	**0.050**	**1.00**	**1.03**
Gambling freq x Time	1.01	0.01	0.334	0.99	1.02
HSLP x Time	1.04	0.03	0.117	0.99	1.10

Dependent Variable: GAMBTIME: Amount of time usually spent gambling past 12 mos. (hours)

Table 6.34: Estimates of Random Effects – Time Spent Gambling and Impact of HSLP

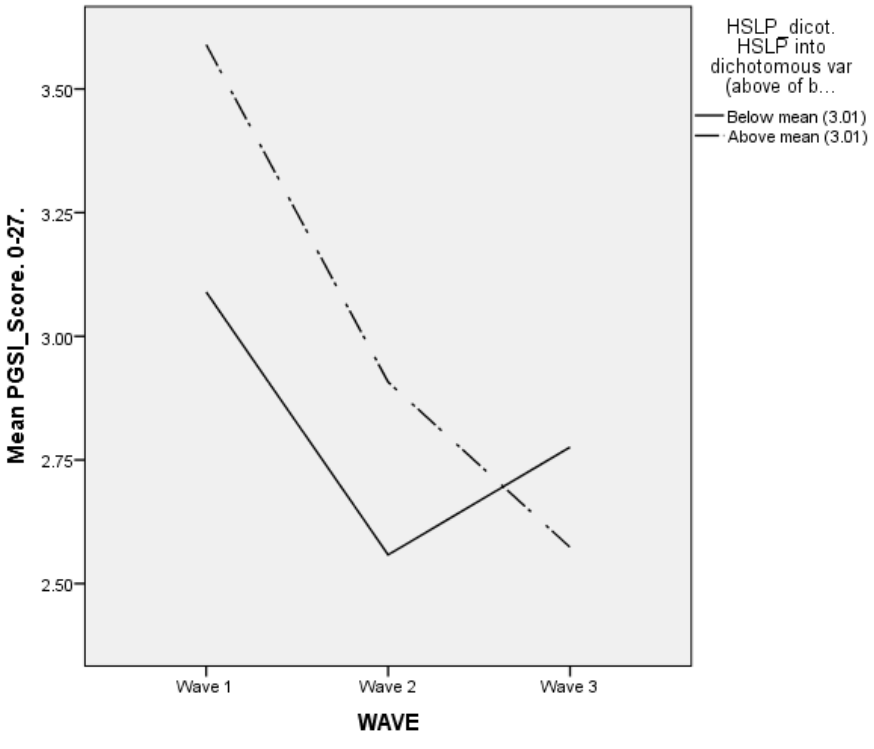
			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	0.51	.035	0.44	0.58

Dependent Variable: GAMBTIME: Amount of time usually spent gambling past 12 mos. (hours)

6.4.9 Do “high success” loyalty programs result in increased gambling risk?

Finally, we investigate whether “high success” LPs are associated with increased gambling risk as measured by the PGSI. The figure below compares “low success” LPs with “high success” programs on PGSI score. The results show that individuals who belong to “higher success” LPs on average have higher PGSI scores in waves 1 and 2 than do people who belong to “lower success” LPs, but the reverse is true in wave 3. The differences in PGSI scores at each time point range from approximately 0.2 to 0.5 on the 27-point PGSI, suggesting quite small differences.

Figure 6.11: Mean PGSI score by HSLP



Estimates of fixed and random effects from the final mixed effects model are summarised in the tables below. Note that this model is a mixed-effects logistic regression model because the PGSI outcome variable has been coded into two categories based on PGSI score: 0-2 (non-problem and low-risk gamblers) and 3-27 (moderate-risk and problem gamblers). Estimates are thus odds-ratios.

The key finding is that **being a member of a "higher success" LP is not significantly associated with PGSI category**, controlling for the other variables. As a person's HSLP score moves up one point, they have 1.21 times the odds of being a moderate-risk or problem gambler when the effects of time, gender, age, main activity, household and personal income, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point)[29]. However, this result in not statistically significant (p = .118).

Variables that predict PGSI category include **age** and **gambling frequency**. Controlling for the other predictor variables, as a person's age increases by 10 years they have 0.58 times the odds of being a moderate-risk or problem gambler (p = 0.001); and as a person spends 10 more occasions per year gambling they have 1.23 times the odds of being a moderate-risk or problem gambler (p <.001).

Table 6.35: Estimates of Fixed Effects – PGSI Score and Impact of HSLP

				95% Confidence Interval	
Parameter	**Odds Ratio**	**Std. Error**	**Sig.**	**Lower Bound**	**Upper Bound**
Time	0.75	0.25	0.390	0.39	1.45
Gender	1.23	0.56	0.657	0.50	3.01
Age	**0.58**	**0.10**	**0.001**	**0.42**	**0.80**
Main activity	0.59	0.33	0.343	0.19	1.77
HH income	0.81	0.12	0.164	0.60	1.09
Personal income	0.94	0.15	0.691	0.68	1.29
Gambling freq	**1.23**	**0.04**	**<0.001**	**1.15**	**1.32**
HSLP	**1.21**	**0.14**	**0.118**	**0.95**	**1.52**
Gender x Time	0.74	0.26	0.392	0.37	1.48
Age x Time	1.00	0.13	0.997	0.78	1.28
Main activity x Time	1.42	0.73	0.497	0.52	3.89
HH income x Time	1.07	0.14	0.584	0.83	1.39
Pers income x Time	0.91	0.13	0.521	0.69	1.20
HSLP x Time	0.84	0.10	0.116	0.67	1.05

Dependent Variable: PGSI_dichot (0-2; 3-27)

Note: Gambling freq x Time omitted from the model due to lack of model convergence with its inclusion

[29] Note that the interaction variable, gambling freq x Time has been omitted from the model. This was due to a lack of model convergence when this variable was included.

Table 6.36: Estimates of Random Effects – PGSI Score and Impact of HSLP

			95% Confidence Interval	
Parameter	**Estimate**	**Std. Error**	**Lower Bound**	**Upper Bound**
Intercept	3.42	.370	2.76	4.22

Dependent Variable: PGSI_dichot (0-2; 3-27)

Overall, therefore, based on the results of the three-wave longitudinal telephone survey of people with at least an interest in playing EGMS, we can conclude the following regarding the impact of gambling loyalty programs on gambling behaviours:

LPM status is significantly related to gambling expenditure, controlling for the other variables. A person who is a loyalty program member spends on average 1.37 times more than a non-LPM (p< .001) per gambling occasion when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

LPM status is significantly related to time spent gambling, controlling for the other variables. A person who is a loyalty program member spends on average 1.23 times more hours gambling than does a non-LPM (p< .001) when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

LPM status is significantly related to gambling frequency, controlling for the other variables. A person who is a loyalty program member gambles on average 1.27 times as frequently as a non-LPM (p< .001) when the effects of time, gender, age, main activity, household and personal income, PGSI score, and the interactions between these predictor variables and time are held constant (at the middle time-point).

LPM status is significantly related to PGSI category, controlling for the other variables. A person who is a loyalty program member has 2.68 times the odds of being a moderate-risk or problem gambler as compared with a non-LPM (*p*= .001) when the effects of time, gender, age, main activity, household and personal income, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point)

LPM status is significantly related to GABS-7 score, controlling for the other variables. A person who is a loyalty program member has on average a GABS-7 score 0.50 points higher than someone who is not a loyalty program member when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

LPM status is not significantly related to feelings of ability to control one's gambling, holding the other variables constant. A person who is a loyalty program member has 0.98 times the odds of having less control as compared with a non-LPM

(*p* =.930) when the effects of time, gender, age, main activity, household and personal income, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

LPM status may be associated with binge gambling, holding the other variables constant. A person who is a loyalty program member has 1.33 times the odds (at the middle time-point) of bingeing on gambling, controlling for the other variables, but this association does not reach our established threshold for statistical significance (*p* =.176).

Whereas loyalty program membership is associated with incentive to gamble (as measured by time/money spent gambling and gambling frequency), **LPM does not appear to be associated with venue loyalty**, as measured by number of venues where gamblers gamble. **Rather than being associated with a smaller number of venues where one plays EGMs, being a member of a LP appears to be associated with a larger number of venues,** even taking into account gambling frequency and the other predictor variables. A person who is a loyalty program member has 2.67 times the odds (at the middle time-point) of playing the pokies at more than one venue as compared with a non-LPM, controlling for the other variables.

Being a member of a "higher success" LP is not associated with gambling expenditure, controlling for the other variables. As a person's HSLP score moves up one point, they spends on average 0.99 times the amount on gambling per gambling occasion when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point).

Being a member of a "higher success" LP is associated with time spent gambling, controlling for the other variables. As a person's HSLP score moves up one point, they spend on average 1.05 times the amount of time gambling (*p* =.044) when the effects of time, gender, age, main activity, household and personal income, PGSI score, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point). However, the effect size is small.

Being a member of a "higher success" LP may be associated with PGSI category, controlling for the other variables. As a person's HSLP score moves up one point, they have 1.21 times the odds of being a moderate-risk or problem gambler when the effects of time, gender, age, main activity, household and personal income, gambling frequency, and the interactions between these predictor variables and time are held constant (at the middle time-point). However, this result in not statistically significant (*p* = .118).

These results are summarised in the table below.

Table 6.37: Main findings from longitudinal survey

Outcome variable	Predictor	Signif*in expected direction?	Association
Money spent	LPM	YES	1.37 times
Time spent	LPM	YES	1.23 times
Gambling frequency	LPM	YES	1.27 times
PGSI score	LPM	YES	2.68 times the odds
GABS-7 score	LPM	YES	0.50 points higher
Perceived control	LPM	YES	0.98 times the odds
Binge gambling	LPM	NO	1.33 times the odds
Venue loyalty	LPM	NO	2.67 times the odds (opposite direction)
Money spent	HSLP	NO	0.99 times
Time spent	HSLP	YES	1.05 times
PGSI score	HSLP	NO	1.21 times the odds

*$p < .05$

6.5 Discussion

The purpose of the longitudinal survey was to gather data on LPM and gambling behaviours and attitudes over time to better understand the relationship between these variables both within and between individuals. Ideally we would like to test whether LPM *causes* changes in gambling behaviours. Survey data, however, cannot prove causation. However, by controlling for factors other than LPM that we believe impact on the outcome variables, as well as ensuring that data gathered about LPM status temporally precedes data on the outcomes variables, we can provide evidence that supports a contention of causation.

The results from the longitudinal survey indicate that loyalty programs are associated with increased amount of money and time spent gambling, the frequency with which one gambles, scores on the GABS-7 which measures feelings around incentive to gamble, and PGSI category which measures problem gambling risk, holding a number of demographic and other variables constant. Significantly, these associations remain when PGSI score and gambling frequency are controlled for in the models for spending on gambling, time spent gambling and GABS-7 models; when gambling frequency is controlled for in the PGSI category model; and when PGSI score is controlled for in the gambling frequency model.

The direction of the association is in the expected direction for binge gambling (odds-ratio of 1.33) although the significance level does not meet our established threshold of $p < .05$. Very few respondents, however, reported any bingeing, with 74% of those asked reporting no days of gambling bingeing in the past 12 months. LPM does not appear to be associated with feelings of control over one's gambling; instead PGSI score and gambling frequency are more important predictors. LPMs do not gamble at fewer venues than non-LPMs as might be expected if LPs induce venue loyalty. However, number of venues is only a proxy measure of loyalty. In any case, given that the statistical outcome was both in the opposite direction *and* statistically significant, this suggests that LPM does not increase venue loyalty to any great extent, regardless of how this is measured.

Less clear is the association between "high success" LPs and gambling behaviours. While higher success LPs are associated with more time spent gambling, the result was in the expected direction but not statistically significant for PGSI category. There was essentially no association between higher success LPs and money spent gambling. Part of the explanation for these findings may be that many respondents belonged to more than one LP, with 21.7% belonging to two or more, yet respondents were asked details only about the LP they used most. This approach was chosen in order to limit survey length and thus minimise respondent burden and maintain high completion rates. However, it is likely that this dilutes the impact of any one LP. Other possibilities for this mixed result regarding HSLPs are discussed in the overall study discussion section.

7 Study discussion

For many people, gambling is an enjoyable, recreational activity – a time to meet up with friends, have a meal, and place a few bets. For a minority of people, however, gambling causes problems, resulting in financial and psychological harm to the gambler and their family and friends. Electronic gaming machines have been the focus of much of this concern, as they are known to be particularly problematic for at-risk gamblers (Productivity Commission 2010).

Some EGM venues offer loyalty programs to their patrons. Little is known about these programs, however, including their prevalence, how they operate, or their impact on gambling behaviours and risks. A key task of government is to design public policy in such a way as to allow people to engage in enjoyable activities while at the same time ensuring that they are not exposed to undue risk. The purpose of this research project was to provide evidence regarding gambling loyalty programs at EGM venues in Australia.

The research design, methodology and analyses were focused on answering the following key research questions:

- What is the prevalence of LPs at EGM venues in Australia and how does this differ by State/Territory and/or by type of venue (casino; club; pub/hotel)?
- What do these LPs consist of / how do they operate?
- How are these LPs marketed?
- What is the Australian and international evidence regarding impact of LPs – both gambling LPs and more generally?
- Do LPs result in changes to gambling behaviours (i.e. money or time spent gambling; gambling frequency; venue loyalty)?
- Do LPs result in increased risk of problem gambling?
- Do “higher success” LPs most encourage gambling activities / increase risk?

In order to provide comprehensive answers to the above questions, a total of four studies were conducted:

1. An audit of 367 gambling loyalty programs at EGM venues across Australia utilising a “mystery shopper” methodology
2. A literature review of the Australian and international literature on loyalty programs’ efficacy and impact as relevant to gambling LPs
3. Six online discussion boards with loyalty program members, segmented by PGSI category and primary venue type
4. A three-wave telephone survey with over 1,000 people with at least an interest in playing EGMs

7.1 Prevalence of LPs at EGM venues in Australia

Previously, the prevalence of gambling LPs in Australia and whether it differed by State/Territory and/or type of venue was unknown. From the audit we know that approximately 18% of EGM venues in Australia have loyalty programs, although this figure varies greatly by State/Territory. Whereas a large majority of venues in Tasmania offer LPs (74%), very few in NSW and the Northern Territory do so (10% and 9%, respectively). We also found that LPs are more common in larger venues and from the survey we know that many gamblers play EGMs at more than one venue and belong to more than one LP. Of survey respondents who had played EGMs in the prior 12 months, approximately 45% reported belonging to at least one LP and 22% said they belonged to two or more. Of survey respondents who had played EGMs in the prior 12 months but were not members of a LP, only approximately 3% said this was because their venue does not have a LP. Therefore it appears that although overall a relatively small percentage of EGM venues across Australia have LPs, their reach is likely greater than the 18% figure would suggest.

7.2 Content and operation of Australian LPs

Based on findings from the audit, discussion boards, and survey, it appears that most loyalty programs in Australia, similar to those discussed in the international literature, operate on a points-based system, usually attached to a membership card that patrons swipe at machines, upon entry to the venue, and/or when purchasing food or drinks. About 85% of survey respondents, for example, said they accrue points with their LP which they can then turn in for rewards. More than three-quarters of respondents who accrue points with their LP said they can get points when they insert their card into EGMs or when they present their card with other purchases, such as food, drinks, or accommodation. Just under half said they can get points by swiping their card upon entry to the venue.

Rewards offered across programs vary and are generally associated with redeeming points for discounts/ vouchers to be used at the venue such as on meals and drinks thus promoting further spend at the venue, redeeming points for prizes, earning gambling credit, and earning entry into prize draws (mainly to win cash). More than half of survey respondents said rewards included food or meals, alcoholic drinks or non-alcoholic drinks; approximately one-half said prizes; and about one-third said gambling credit. Approximately 20% of respondents stated they could get cash rewards through their LP.

Many LPs appear to offer immediately rewards upon joining, particularly the casinos. Approximately 35% of survey respondents said they received points or some other reward immediately upon signing up for the LP. They also received a variety of information upon joining. A majority of respondents said they received the following information upon signing up for the LP: how to get points, how many points you need to get rewards, and what kinds of rewards you could get. Just under half said they were provided with a gambling help line or other information about where to get help with gambling difficulties and responsible gambling messages. Approximately 10% of

respondents said they received no information upon joining their LP. Several discussion participants admitted that they did not really understand how their LP worked, including how many points they accumulated for particular activities.

Most Australian LPs appear to fall well short of “best practice” LPs as determined from the literature review. An examination of the frequency distribution of the HSLP variable, for example, shows that the average LP of survey respondents received a score of just 3 on the 0 to 7 scale, with no LPs receiving a score of 7, and just 1.2% had a score of 6 or higher.

7.3 Marketing of LPs

Compared with the LPs discussed in the international literature, the marketing of gambling LPs in Australia does not appear to be particularly aggressive or sophisticated. From the audit we found that most LPs are not advertised heavily if at all on venue websites nor was information about LPs readily acquired by asking for it over the telephone. Of survey respondents who have played EGMs at least once in the past 12 months, approximately 6% of those who are not LP members said this is because they do not know whether the venue where they play most often has a LP.

From the discussion board participants and results of the survey it seems that communications about the LP once someone has become a member are mostly infrequent, and there does not appear to be personalised targeted marketing based on individual gambling behaviours. Only around 11% of survey respondents who are LP members, for example, reported receiving communications about the LP more often than once a month. Most of these communications were via regular mail, or else by email. Discussion board participants generally said they would prefer to receive more communication from the venue regarding the LP. Unlike the U.S. casinos described in the literature where venues aggressively fight for new members and patrons compared programs to get the best value, none of the discussion board participants said they had compared LPs before joining and most stated that they thought there was little difference among programs.

At the same time, some aggressive tactics were utilised by Australian LPs. For example, many club members reported being automatically signed up to the LP with their general membership; patrons of casinos, pubs and hotels frequently mentioned staff approaching them to inform them of the LP and sometimes even filling out the membership application for them; and in several pubs and hotels discussion board participants said they were told they were required to join the LP if they wanted to gamble at the venue and lived within a certain distance to the venue.

7.4 Impact of LPs on behaviours and risk of problem gambling

A major focus of this study was on attempting to determine the impact, if any, of LPs on gambling behaviours and, in particular, risk of problem gambling. Unfortunately, almost no research either within Australia or internationally provides evidence on this issue. The research regarding impact of LPs in general or in other industries is mixed; most reviews conclude that effects on attitudes and/or behaviours are positive but small. Therefore, most of the evidence we provide on these issues is based on findings from the online discussion boards and longitudinal survey.

Do loyalty programs result in increased EGM gambling (money and/or time and/or number of visits)?

LP membership is associated with increased EGM gambling.

Results from the longitudinal analysis of the three-wave telephone survey show us that, even controlling for time, gender, age, main activity, and household and personal income, PGSI score and gambling frequency (for money and time spent), loyalty program membership is associated with amount of money gambled (at last gambling session), time usually spent gambling (past 12 months) and frequency of gambling (usually, in the past 12 months). In all cases, LPM results in more money spent, more time spent, and more frequent gambling occasions. In addition, approximately 18% of survey respondents said that they had played EGMs for longer than they had intended so they could get more rewards; 16% admitted they had spent more money than they would have otherwise so they could get more rewards; and approximately 14% reported that they had visited a EGM venue more often than they would have otherwise so they could get more rewards. Finally, approximately 26% of survey respondents either agreed or strongly agreed that having a LPM results in their gambling more than they would otherwise.

Although most discussion board participants initially claimed that their loyalty program has no influence on their gambling behaviours, other comments by these same participants often suggested that in fact the loyalty program did have some impact. Problem gamblers and former problem gamblers were particularly likely to state that their loyalty program impacted on their gambling.

Do loyalty programs result in increased risk of problem gambling?

LP membership is associated with increased risk of problem gambling.

Evidence for this question is largely based on the longitudinal telephone survey. After controlling for time, gender, age, main activity, and household and personal income, PGSI score (for the GABS-7 model) and gambling frequency, being a loyalty program member significant increases the odds of being in the “moderate-risk or problem risk” category according to the PGSI and is associated with a higher score on the GABS-7. In addition, a number of discussion board participants, and particularly those with higher PGSI scores, agreed that their loyalty program increased their difficulties with gambling. Moreover, several former problem gamblers stated that their loyalty program

increased their difficulties around gambling and most had since given up their LPM for this reason.

Do loyalty programs induce (give people a reason) to visit an EGM venue?

LP membership may be associated with inducement to visit an EGM venue.

Although online discussion board participants mostly said that their loyalty program had no impact on their gambling-related behaviours, more admitted that it did have some effect on their venue choice and attendance – that they likely attended the venue more often than they might otherwise and that their LPM might have some influence on which venue they attended (i.e. one with a LP versus one that did not). Moreover, between 18 and 65 per cent of participants (depending on risk level and venue type) said they would consider changing venues if another venue offered a better loyalty program.

As reported above, approximately 14% of survey respondents said they had visited an EGM venue more often than they would have otherwise so they could get more rewards. In addition, if the venue where they currently most use their LPM were to discontinue their LP, approximately 8.5% of survey respondents said they would play EGMs at that venue much less than they do now, with an additional 10% saying they would play somewhat less. Using number of venues as a proxy for loyalty, however, it is clear from the mixed effects analysis that LPM is not associated with venue loyalty, with LPMs actually playing EGMs at *more* venues than non-LPMs, even holding gambling frequency and the other predictor variables constant.

If there is an association between LPM and venue loyalty, it does not appear that loyalty programs *initially* induce people to visit an EGM venue. In other words, there was no indication that people first heard about the LP and then decided to attend the venue. Instead, most people seemed to already be venue patrons and subsequently learned of the loyalty program.

Do loyalty programs affect gamblers' control?

LP membership may be associated with binge gambling but does not appear to be associated with feelings of inability to stop or cut down on gambling.

Results from the survey on the association between loyalty program membership and binge gambling show that LPMs have 1.33 times the odds of having binged on gambling in the past 12 months, controlling for gambling frequency and PGSI score as well as the other predictor variables. This result, however, does not reach the threshold for statistical significance of $p < .05$. This result suggests that LPs may be associated with binge gambling, but more research is necessary. Part of the difficulty with testing this association is the small percentage of people who report binge gambling. There appears to be little relationship, however, between LPM and feelings of control over gambling. LPMs had essentially equal odds with non-LPMs of agreeing with at least one of the statements about inability to stop or reduce gambling.

There is some indication from the discussion boards that a minority of participants feel that loyalty program membership, and in particular chasing points or levels, induces them to spend more money gambling than they had intended.

Which loyalty programs most encourage gambling activities/higher levels of spending/time spent gambling?

Type of LP appears to have little association with gambling behaviours.

Findings from the literature review provided some suggestions regarding what constitute more "successful" loyalty programs, although the evidence is not conclusive and opinion is somewhat mixed. Some of these components, applied to the Australian gambling loyalty program context, include: a mix of "hard" and "soft" rewards; providing an integrated rewards program across the venue incorporating gambling, hotel, food, drinks, shows, etc.; tiers; and rewards valued by consumers, which tend to be economic rewards.

Based on these findings from the literature review, we therefore defined a "high success" LP as one that includes the following components:

- Information upon joining about how to get points and rewards
- Points or rewards immediately upon joining
- More frequent communications regarding the LP which do not include summary of spending or time spent gambling
- Tiers
- Point accrual which can then be turned in for rewards
- Multiple types of rewards

From the survey results, we find that "higher success" LPs are associated with more time spent gambling, may be associated with an increased likelihood of being a "moderate-risk" or "problem gambler", but are not associated with more money spent gambling. One likely reason for these mixed results is that most gambling loyalty programs in Australia do not appear to be particularly "successful". The highest rating of any of the LPs discussed in the survey was 6.5 on a scale of 0 to 8, with a mean of 3.0. Indeed, 28% of LPs had HSLP scores of 0 to 2. Several of the discussion board participants stated that they saw little difference among different LPs. And we know from the audit that gaining information about the LPs was relatively difficult – whether by accessing the venue's website or asking for information on the LP to be sent, indicating a lack of aggressive marketing.

Another likely explanation for this lack of impact is that many EGM gamblers belong to more than one LP, yet survey respondents were asked detailed questions only about the LP they used the most. As a result, the true impact of "more successful" LPs may have been somewhat diluted. Finally, the literature on loyalty programs is somewhat inconclusive regarding impact of programs on behaviours, with some arguing that, regardless of what components are included in the LP or how it is set up, LPs have little or no impact on "purchasing" behaviour.

8 Limitations

Several limitations of the research are discussed. First, information about LPs for the audit was conducted by examining the venue's website (if it had one) and speaking over the telephone with someone at the venue. This compares with the way most people join LPs, which appears to be in person at the venue. It is possible that different or additional information may have been gathered with an in-person approach. However, such a methodology is simply not cost-effective given that venues are located throughout Australia. It is also possible that the particular individual answering the telephone provided different information than might have been gathered by talking with a different staff member.

Second, because LPMs who participated in the online discussion boards knew that the topic of discussion was loyalty programs, it is possible that LPs came up more often in discussions than might otherwise be the case – for example, when asked why they chose a particular venue to play EGMs.

Third, many of the behaviour questions in the survey asked about behaviours over the prior 12 months, but data collection waves were six months apart. As a result, respondents at a given wave were asked about behaviour that overlapped with a prior wave. For example, at wave 2, a respondent was reporting on behaviour that overlapped with wave 1 behaviour by six months. The 12-month timeframe was retained for these questions because most are standard and validated questions used in prior gambling studies. Moreover, we know that when people are asked about prior behaviours they tend to report more recent behaviours (Möller, Kranz, Schmid, Roalter, & Diewald, 2013).

Fourth, for survey respondents who changed LPM status between waves (e.g. were LPMs at wave 1 but not LPMs at wave 2), we do not know when exactly this change in status occurred. If proximate time is a factor between LPM and outcome variables, we would not capture this in our analysis. For example, if a respondent who was not a LPM in wave 1 but was a LPM in wave 2, it is possible that they become a LPM the day prior to the wave 2 survey, in which case money spent on last gambling occasion may not reflect any impact of this change in LPM status. However, it is unlikely respondents would remember exactly when they changed LPM status and exactly when they are referencing reported behaviours.

Fifth, as discussed above, venue "loyalty" is difficult to measure. This issue was presented to discussion board participants, but we know that people are often loathe to admit that outside forces impact on their choices and behaviours. In the survey, we asked about number of venues where someone played EGMs, assuming that this number would be lower on average for LPMs than non-LPMs when controlling for gambling frequency. However, this may not be the case. For example, it may be that number of venues does not change, but that frequency of venue attendance at LP venues is higher than at non-LP venues. Cognizant of respondent burden (keeping the survey to a reasonable length), we did not ask questions in the survey to this level of detail. Future research focused on this specific issue may be warranted.

Sixth, computation of the HSLP variable was based on findings from the literature but not specifically tested. Future research may want to further investigate this issue of types of LPs and impact on behaviours. It may be the case, however, as several discussion board participants stated, that Australian LPs are relatively similar; it may also be the case, as a number of LP researchers have concluded, that type of LP has little impact on behaviour.

Finally, the longitudinal survey was conducted over only a 12-month period whereas behaviour change is normally a slow process. This includes loyalty program membership and gambling behaviours; one would expect most people to either be LPMs or not LPMs across all three waves of data collection and for any behaviour change over that time to be limited – whether in money or time spent gambling, frequency of gambling, risk of problem gambling, feelings of control around gambling, or venue loyalty. Therefore, these results likely underreport true impact of LPs on gambling behaviours.

9 Study conclusions

Prior to this study, almost nothing was known about prevalence or content of gambling LPs in Australia, or the impact of LPs on gambling behaviours and risk of problem gambling. Given the significant harm to gamblers, their family and friends, and the larger community that comes from problem gambling, it is important to ensure that loyalty programs do not exacerbate this harm or potential for harm.

As discussed previously in this report, establishing causation in human behaviour is often very difficult. The only way to truly know whether LPs cause increases in gambling or risk of problem gambling would be to randomly assign people to a LP or non-LP group and then measure their gambling behaviours and problem gambling risk. Such an experiment, however, would obviously be both unethical and impossible to implement.

Instead, this study incorporates a variety of methodologies to help provide evidence regarding the impact of LPs on gambling behaviours and risk. These methodologies included a literature review, to understand current knowledge regarding impact of loyalty programs; an audit of Australian LPs to establish their prevalence and content; online discussion boards with LP members to gather more detailed information on LPs and hear participants' views regarding whether these programs have, or have not, impacted on their gambling behaviours and attitudes; and finally, a longitudinal survey of Australians with some interest in playing EGMs to investigate associations between LP status and gambling behaviours and problem gambling risk levels over time. The findings from each of these studies are important in and of themselves; together they provide a detailed and multifaceted picture of loyalty programs in Australia and their potential impact on the people who join them.

Although we find that a minority of EGM venues in Australia currently have loyalty programs, all but one of the casinos and many of the larger venues do have loyalty programs. In addition, many gamblers play EGMs at multiple venues. Therefore, the reach of these programs may be considerable. Moreover, it is possible that more venues will implement such programs in the future. It is hoped that this study provides useful information to policymakers and others regarding gambling loyalty programs and their impact on the people who join them.

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10 Appendices

Appendix 1: AUDIT - Audit Tool / Questionnaire

social research group

Gambling Research Australia (Department of Justice)

The Role of Loyalty Programs in Gambling

(Ref: 2730)

SAMPLE DETAILS: Venue name, ID, telephone number (where available)

SECTION 1: WEBSITE SEARCH

Google the venue name and open website

Q.1. ENTER WEBSITE ADDRESS:

www._____._____._____

Q.2. ENTER VENUE TELEPHONE NUMER:

(___ ___) ___ ___ ___ ___ ___ ___ ___ ___

Q.3. ENTER VENUE STATE:

Victoria	1
New South Wales	2
Queensland	3
South Australia	4
Western Australia	5
Tasmania	6
ACT	7
Northern Territory	8

Q.4. ENTER VENUE POSTCODE:

POSTCODE _____

Q.5. Does this venue have pokies?

Yes	1
No (GO TO CLOSE)	2

Q.6. Does this venue appear to have a loyalty program?

Yes	1
No (GO TO NEXT SECTION)	2

8/707 Mt Alexander Rd Moonee Ponds Victoria 3039
T: 03 9372 8400 F: 03 8372 8411
www.marketsolutions.com.au

Q.7. Is the program prominent on the website?

Yes – home page	1
Yes – easy to navigate to	2
No – difficult to find on website	3

Q.8. Does the loyalty program have a specific name?

Yes _____	1
No	2

Q.9. Is the program linked to gambling activities at the venue?

Yes – time played	1
Yes – amount spent	2
Yes – other	3
No	4
Unsure	5

Q.10. Is the program linked to non- gambling activities?

Yes – spend at the venue on dinner/drinks	1
Yes – other	2
No	3
Unsure	4

SECTION 2: ANONYMOUS AUDIT

Call the venue and ask to speak to someone about how to join their rewards program for pokie players.

Example intro:

"Hi there, um I'd like to talk to someone about how to join up for your rewards for pokie players. I've had a quick look on your website and [I saw that you have something called (…)] OR [I didn't see anything on there but someone told me that you do rewards for pokie players]. I really like to go to places that have rewards…"

During the conversation attempt to cover off the following:

- ☐ How does the program work – is it based on time/amount spent on pokies etc.?
- ☐ How do you build up rewards points?
- ☐ What sorts of rewards can you get?
- ☐ How do you join up?
- ☐ Do they have other offers for people who play pokies?
- ☐ Do they send out newsletters or other communications?
- ☐ Can they send information to you by email?

RECORD RESPONSES:

CLOSE

RECORD INTERVIEWER'S ID

Appendix 2: AUDIT - Detailed Cross Tabs

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

SAMPLE - VENUE TYPE

			VENUE TYPE			REGION		STATE							
BASE:ALL VENUES		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
VENUE TYPE - CODED	Casino	13	0	0	13	8	5	1	1	4	1	2	1	2	1
		0.2%	0.0%	0.0%	100.0%	0.4%	0.1%	1.3%	0.0%	0.3%	0.2%	2.0%	0.2%	2.7%	100.0%
	Club	2320	0	2320	0	870	1450	63	1322	557	69	10	266	33	0
		40.7%	0.0%	100.0%	0.0%	42.1%	39.9%	82.9%	43.6%	42.0%	12.2%	9.8%	51.6%	44.6%	0.0%
	Hotel	3363	3363	0	0	1188	2175	12	1710	766	497	90	249	39	0
		59.0%	100.0%	0.0%	0.0%	57.5%	59.9%	15.8%	56.4%	57.7%	87.7%	88.2%	48.3%	52.7%	0.0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SAMPLE - VENUE TYPE

			VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
BASE:ALL VENUES		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
VENUE TYPE - CODED	Casino	13	11	0	2	0	12	1	12	0	0	1
		0 2%	4 0%	0 0%	0 1%	0 0%	1 1%	0 0%	1 1%	0 0%	0 0%	0 5%
	Club	2320	182	414	1035	689	599	1721	599	422	1227	72
		40 7%	66 4%	43 0%	49 1%	29 3%	57 4%	37 0%	57 4%	77 4%	31 3%	37 9%
	Hotel	3363	81	549	1071	1662	433	2930	433	123	2689	117
		59 0%	29 6%	57 0%	50 8%	70 7%	41 5%	63 0%	41 5%	22 6%	68 7%	61 6%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE - VENUE TYPE

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) - DETAILED				
BASE ALL VENUES		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5698	1791	1297	1572	1036	1791	1297	1572	1023	13
VENUE TYPE - CODED	Casino	13	0	0	0	13	0	0	0	0	13
		0 2%	0 0%	0 0%	0 0%	1 3%	0 0%	0 0%	0 0%	0 0%	100 0%
	Club	2320	613	475	437	795	613	475	437	795	0
		40 7%	34 2%	36 6%	27 8%	76 8%	34 2%	36 6%	27 8%	77 8%	0 0%
	Hotel	3363	1178	822	1136	228	1178	822	1136	228	0
		59 0%	65 8%	63 4%	72 2%	22 0%	65 8%	63 4%	72 2%	22 2%	0 0%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE - VENUE SIZE

			VENUE TYPE			REGION		STATE							
BASE:ALL VENUES		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
VENUE SIZE (NO EGMs)	Very small (up to 10 EGMs)	1791	1178	613	0	441	1350	20	1175	402	125	0	21	48	0
		31 4%	35 0%	26 4%	0 0%	21 3%	37 2%	26 8%	38 8%	30 3%	22 0%	0 0%	4 0%	64 6%	0 0%
	Small (11 to 20 EGMs)	1297	822	475	0	274	1023	17	788	242	208	31	0	11	0
		22 8%	24 4%	20 5%	0 0%	13 3%	28 2%	22 1%	26 0%	18 2%	36 7%	29 9%	0 0%	14 9%	0 0%
	Medium (21 to 40 EGMs)	1572	1136	437	0	865	707	4	645	460	233	70	156	4	0
		27 6%	33 8%	18 8%	0 0%	41 9%	19 5%	5 5%	21 3%	34 6%	41 1%	68 1%	30 3%	5 9%	0 0%
	Large (>40 EGMs)	1036	228	795	13	486	550	35	424	223	1	2	339	11	1
		18 2%	6 8%	34 3%	100 0%	23 5%	15 1%	45 5%	14 0%	16 8%	0 2%	2 0%	65 7%	14 6%	100 0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

SAMPLE - VENUE SIZE

			VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
BASE ALL VENUES		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
VENUE SIZE (NO EGMs)	Very small (up to 10 EGMs)	1791	0	231	466	1094	14	1777	14	96	1500	181
		31 4%	0 0%	24 0%	22 1%	46 5%	1 3%	38 2%	1 3%	17 6%	38 3%	95 0%
	Small (11 to 20 EGMs)	1297	14	197	431	654	36	1261	36	142	1115	4
		22 8%	5 1%	20 5%	20 5%	27 8%	3 4%	27 1%	3 4%	26 0%	28 5%	2 2%
	Medium (21 to 40 EGMs)	1572	70	322	657	523	357	1216	357	206	1005	4
		27 6%	25 4%	33 5%	31 2%	22 3%	34 1%	26 1%	34 1%	37 8%	25 7%	2 3%
	Large (>40 EGMs)	1036	191	211	554	79	638	398	638	101	296	1
		18 2%	69 5%	22 0%	26 3%	3 4%	61 1%	8 5%	61 1%	18 5%	7 6%	0 5%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE - VENUE SIZE - DETAILED

			VENUE TYPE			REGION		STATE							
BASE ALL VENUES		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
VENUE SIZE (NO EGMs) - DETAILED	Very small (up to 10 EGMs)	1791	1178	613	0	441	1350	20	1175	402	125	0	21	48	0
		31 4%	35 0%	26 4%	0 0%	21 3%	37 2%	26 8%	38 8%	30 3%	22 0%	0 0%	4 0%	64 6%	0 0%
	Small (11 to 20 EGMs)	1297	822	475	0	274	1023	17	788	242	208	31	0	11	0
		22 8%	24 4%	20 5%	0 0%	13 3%	28 2%	22 1%	26 0%	18 2%	36 7%	29 9%	0 0%	14 9%	0 0%
	Medium (21 to 40 EGMs)	1572	1136	437	0	865	707	4	645	460	233	70	156	4	0
		27 6%	33 8%	18 8%	0 0%	41 9%	19 5%	5 5%	21 3%	34 6%	41 1%	68 1%	30 3%	5 9%	0 0%
	Large (>40 EGMs)	1023	228	795	0	478	545	34	423	219	0	0	338	9	0
		18 0%	6 8%	34 3%	0 0%	23 1%	15 0%	44 2%	13 9%	16 5%	0 0%	0 0%	65 5%	11 9%	0 0%
	Casinos	13	0	0	13	8	5	1	1	4	1	2	1	2	1
		0 2%	0 0%	0 0%	100 0%	0 4%	0 1%	1 3%	0 0%	0 3%	0 2%	2 0%	0 2%	2 7%	100 0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE VENUE SIZE DETAILED

			VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
BASE ALL VENUES		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
VENUE SIZE (NO EGMs) - DETAILED	Very small (up to 10 EGMs)	1791	0	231	466	1094	14	1777	14	96	1500	181
		31 4%	0 0%	24 0%	22 1%	46 5%	1 3%	38 2%	1 3%	17 6%	38 3%	95 0%
	Small (11 to 20 EGMs)	1297	14	197	431	654	36	1261	36	142	1115	4
		22 8%	5 1%	20 5%	20 5%	27 8%	3 4%	27 1%	3 4%	26 0%	28 5%	2 2%
	Medium (21 to 40 EGMs)	1572	70	322	657	523	357	1216	357	206	1005	4
		27 6%	25 4%	33 5%	31 2%	22 3%	34 1%	26 1%	34 1%	37 8%	25 7%	2 3%
	Large (>40 EGMs)	1023	180	211	552	79	626	397	626	101	296	0
		18 0%	65 5%	22 0%	26 2%	3 4%	60 0%	8 5%	60 0%	18 5%	7 6%	0 0%
	Casinos	13	11	0	2	0	12	1	12	0	0	1
		0 2%	4 0%	0 0%	0 1%	0 0%	1 1%	0 0%	1 1%	0 0%	0 0%	0 5%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE - REGION - BROAD

			VENUE TYPE			REGION		STATE							
BASE:ALL VENUES		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
REGION - BROAD	Metro	2066	1188	870	8	2066	0	27	1005	396	259	35	299	44	1
		36.3%	35.3%	37.5%	61.5%	100.0%	0.0%	34.9%	33.2%	29.9%	45.8%	33.8%	57.9%	59.7%	100.0%
	Non metro	3630	2175	1450	5	0	3630	50	2028	931	308	68	217	30	0
		63.7%	64.7%	62.5%	38.5%	0.0%	100.0%	65.1%	66.8%	70.1%	54.2%	66.2%	42.1%	40.3%	0.0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

SAMPLE - REGION - BROAD

			VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
BASE:ALL VENUES		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
REGION - BROAD	Metro	2066	124	437	1027	478	519	1547	519	188	1244	114
		36 3%	45 1%	45 4%	48 7%	20 4%	49 7%	33 2%	49 7%	34 5%	31 8%	60 1%
	Non metro	3630	151	526	1082	1872	525	3105	525	357	2672	76
		63 7%	54 9%	54 6%	51 3%	79 6%	50 3%	66 8%	50 3%	65 5%	68 2%	39 9%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE - REGION - BROAD

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) - DETAILED				
BASE ALL VENUES		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
REGION - BROAD	Metro	2066	441	274	865	486	441	274	865	478	8
		36 3%	24 6%	21 1%	55 0%	46 9%	24 6%	21 1%	55 0%	46 7%	61 5%
	Non metro	3630	1350	1023	707	550	1350	1023	707	545	5
		63 7%	75 4%	78 9%	45 0%	53 1%	75 4%	78 9%	45 0%	53 3%	38 5%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE - REGION - DETAILED

			VENUE TYPE			REGION		STATE							
BASE:ALL VENUES		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
REGION - DETAILED (based on postcode)	ACT metro	27	5	21	1	27	0	27	0	0	0	0	0	0	0
		0 5%	0 1%	0 9%	7 7%	1 3%	0 0%	34 9%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
	ACT non metro	76	8	68	0	0	76	50	26	0	0	0	0	0	0
		1 3%	0 2%	2 9%	0 0%	0 0%	2 1%	65 1%	0 9%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
	NSW metro	1005	581	423	1	1005	0	0	1005	0	0	0	0	0	0
		17 7%	17 3%	18 2%	7 7%	48 7%	0 0%	0 0%	33 2%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
	NSW non metro	2001	1129	873	0	0	2001	0	2001	0	0	0	0	0	0
		35 1%	33 6%	37 6%	0 0%	0 0%	55 1%	0 0%	66 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
	VIC metro	299	159	138	1	299	0	0	0	0	0	0	299	0	0
		5 2%	4 7%	6 0%	7 7%	14 5%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	57 9%	0 0%	0 0%
	VIC non metro	217	90	128	0	0	217	0	0	0	0	0	217	0	0
		3 8%	2 7%	5 5%	0 0%	0 0%	6 0%	0 0%	0 0%	0 0%	0 0%	0 0%	42 1%	0 0%	0 0%
	QLD metro	396	172	223	1	396	0	0	0	396	0	0	0	0	0
		7 0%	5 1%	9 6%	7 7%	19 2%	0 0%	0 0%	0 0%	29 9%	0 0%	0 0%	0 0%	0 0%	0 0%
	QLD non metro	931	594	334	3	0	931	0	0	931	0	0	0	0	0
		16 3%	17 7%	14 4%	23 1%	0 0%	25 6%	0 0%	0 0%	70 1%	0 0%	0 0%	0 0%	0 0%	0 0%
	SA metro	259	215	43	1	259	0	0	0	0	259	0	0	0	0
		4 6%	6 4%	1 9%	7 7%	12 6%	0 0%	0 0%	0 0%	0 0%	45 8%	0 0%	0 0%	0 0%	0 0%
	SA non metro	308	282	26	0	0	308	0	0	0	308	0	0	0	0
		5 4%	8 4%	1 1%	0 0%	0 0%	8 5%	0 0%	0 0%	0 0%	54 2%	0 0%	0 0%	0 0%	0 0%
	WA metro	1	0	0	1	1	0	0	0	0	0	0	0	0	1
		0 0%	0 0%	0 0%	7 7%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	100 0%
	TAS metro	35	32	2	1	35	0	0	0	0	0	35	0	0	0
		0 6%	0 9%	0 1%	7 7%	1 7%	0 0%	0 0%	0 0%	0 0%	0 0%	33 8%	0 0%	0 0%	0 0%
	TAS non metro	68	59	8	1	0	68	0	0	0	0	68	0	0	0
		1 2%	1 7%	0 3%	7 7%	0 0%	1 9%	0 0%	0 0%	0 0%	0 0%	66 2%	0 0%	0 0%	0 0%
	NT metro	44	23	20	1	44	0	0	0	0	0	0	0	44	0
		0 8%	0 7%	0 9%	7 7%	2 1%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	59 7%	0 0%
	NT non metro	30	16	13	1	0	30	0	0	0	0	0	0	30	0
		0 5%	0 5%	0 6%	7 7%	0 0%	0 8%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	40 3%	0 0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

SAMPLE - REGION - DETAILED

			VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
BASE ALL VENUES		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
REGION - DETAILED (based on postcode)	ACT metro	27	0	0	22	4	8	18	8	0	8	10
		0 5%	0 0%	0 0%	1 1%	0 2%	0 8%	0 4%	0 8%	0 0%	0 2%	5 1%
	ACT non metro	76	0	8	55	13	52	24	52	0	17	8
		1 3%	0 0%	0 9%	2 6%	0 5%	4 9%	0 5%	4 9%	0 0%	0 4%	3 9%
	NSW metro	1005	0	114	539	353	202	804	202	0	717	87
		17 7%	0 0%	11 8%	25 6%	15 0%	19 3%	17 3%	19 3%	0 0%	18 3%	45 8%
	NSW non metro	2001	0	174	617	1210	132	1869	132	174	1626	68
		35 1%	0 0%	18 1%	29 3%	51 5%	12 7%	40 2%	12 7%	32 0%	41 5%	36 0%
	VIC metro	299	1	10	266	21	81	218	81	85	122	11
		5 2%	0 4%	1 0%	12 6%	0 9%	7 7%	4 7%	7 7%	15 6%	3 1%	5 6%
	VIC non metro	217	0	0	176	41	41	176	41	64	112	0
		3 8%	0 0%	0 0%	8 4%	1 8%	3 9%	3 8%	3 9%	11 7%	2 9%	0 0%
	QLD metro	396	104	179	75	38	104	292	104	103	190	0
		7 0%	37 8%	18 6%	3 5%	1 6%	9 9%	6 3%	9 9%	18 8%	4 8%	0 0%
	QLD non metro	931	144	270	190	327	224	707	224	103	604	0
		16 3%	52 5%	28 0%	9 0%	13 9%	21 4%	15 2%	21 4%	18 8%	15 4%	0 0%
	SA metro	259	14	100	108	37	93	166	93	0	162	4
		4 6%	5 1%	10 4%	5 1%	1 6%	8 9%	3 6%	8 9%	0 0%	4 1%	2 3%
	SA non metro	308	0	42	21	245	25	282	25	17	266	0
		5 4%	0 0%	4 3%	1 0%	10 4%	2 4%	6 1%	2 4%	3 0%	6 8%	0 0%
	WA metro	1	1	0	0	0	1	0	1	0	0	0
		0 0%	0 4%	0 0%	0 0%	0 0%	0 1%	0 0%	0 1%	0 0%	0 0%	0 0%
	TAS metro	35	1	23	5	7	26	9	26	0	9	0
		0 6%	0 4%	2 3%	0 2%	0 3%	2 4%	0 2%	2 4%	0 0%	0 2%	0 0%
	TAS non metro	68	6	27	14	22	50	18	50	0	18	0
		1 2%	2 0%	2 8%	0 6%	0 9%	4 8%	0 4%	4 8%	0 0%	0 4%	0 0%
	NT metro	44	3	11	12	18	5	39	5	0	36	3
		0 8%	1 2%	1 2%	0 6%	0 8%	0 5%	0 8%	0 5%	0 0%	0 9%	1 4%
	NT non metro	30	1	4	10	15	1	29	1	0	29	0
		0 5%	0 4%	0 5%	0 5%	0 6%	0 1%	0 6%	0 1%	0 0%	0 7%	0 0%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

SAMPLE REGION DETAILED

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
BASE ALL VENUES		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
REGION DETAILED (based on postcode)	ACT metro	27	9	8	4	5	9	8	4	4	1
		0 5%	0 5%	0 6%	0 3%	0 5%	0 5%	0 6%	0 3%	0 4%	7 7%
	ACT non metro	76	12	8	0	56	12	8	0	56	0
		1 3%	0 7%	0 6%	0 0%	5 4%	0 7%	0 6%	0 0%	5 5%	0 0%
	NSW metro	1005	269	140	437	160	269	140	437	159	1
		17 7%	15 0%	10 8%	27 8%	15 4%	15 0%	10 8%	27 8%	15 5%	7 7%
	NSW non metro	2001	906	648	208	238	906	648	208	238	0
		35 1%	50 6%	50 0%	13 3%	23 0%	50 6%	50 0%	13 3%	23 3%	0 0%
	VIC metro	299	21	0	52	226	21	0	52	225	1
		5 2%	1 2%	0 0%	3 3%	21 8%	1 2%	0 0%	3 3%	22 0%	7 7%
	VIC non metro	217	0	0	104	113	0	0	104	113	0
		3 8%	0 0%	0 0%	6 6%	10 9%	0 0%	0 0%	6 6%	11 0%	0 0%
	QLD metro	396	75	42	195	85	75	42	195	84	1
		7 0%	4 2%	3 2%	12 4%	8 2%	4 2%	3 2%	12 4%	8 2%	7 7%
	QLD non metro	931	327	200	265	139	327	200	265	136	3
		16 3%	18 3%	15 4%	16 8%	13 4%	18 3%	15 4%	16 8%	13 3%	23 1%
	SA metro	259	37	75	146	1	37	75	146	0	1
		4 6%	2 1%	5 8%	9 3%	0 1%	2 1%	5 8%	9 3%	0 0%	7 7%
	SA non metro	308	87	133	87	0	87	133	87	0	0
		5 4%	4 9%	10 3%	5 5%	0 0%	4 9%	10 3%	5 5%	0 0%	0 0%
	WA metro	1	0	0	0	1	0	0	0	0	1
		0 0%	0 0%	0 0%	0 0%	0 1%	0 0%	0 0%	0 0%	0 0%	7 7%
	TAS metro	35	0	5	29	1	0	5	29	0	1
		0 6%	0 0%	0 3%	1 8%	0 1%	0 0%	0 3%	1 8%	0 0%	7 7%
	TAS non metro	68	0	26	41	1	0	26	41	0	1
		1 2%	0 0%	2 0%	2 6%	0 1%	0 0%	2 0%	2 6%	0 0%	7 7%
	NT metro	44	30	4	2	8	30	4	2	7	1
		0 8%	1 7%	0 3%	0 1%	0 7%	1 7%	0 3%	0 1%	0 6%	7 7%
	NT non metro	30	18	7	2	3	18	7	2	2	1
		0 5%	1 0%	0 5%	0 1%	0 3%	1 0%	0 5%	0 1%	0 2%	7 7%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

SAMPLE - STATE

BASE:ALL VENUES		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
STATE - CODED	ACT	76	12	63	1	27	50	76	0	0	0	0	0	0	0
		1.3%	0.4%	2.7%	7.7%	1.3%	1.4%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	NSW	3033	1710	1322	1	1005	2028	0	3033	0	0	0	0	0	0
		53.2%	50.8%	57.0%	7.7%	48.7%	55.9%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	QLD	1327	766	557	4	396	931	0	0	1327	0	0	0	0	0
		23.3%	22.8%	24.0%	30.8%	19.2%	25.6%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SA	567	497	69	1	259	308	0	0	0	567	0	0	0	0
		10.0%	14.8%	3.0%	7.7%	12.6%	8.5%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
	TAS	102	90	10	2	35	68	0	0	0	0	102	0	0	0
		1.8%	2.7%	0.4%	15.4%	1.7%	1.9%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
	VIC	516	249	266	1	299	217	0	0	0	0	0	516	0	0
		9.1%	7.4%	11.5%	7.7%	14.5%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
	NT	74	39	33	2	44	30	0	0	0	0	0	0	74	0
		1.3%	1.2%	1.4%	15.4%	2.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
	WA	1	0	0	1	1	0	0	0	0	0	0	0	0	1
		0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SAMPLE - STATE

BASE:ALL VENUES		Total	VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
STATE - CODED	ACT	76	0	8	51	17	34	42	34	0	25	17
		1.3%	0.0%	0.9%	2.4%	0.7%	3.2%	0.9%	3.2%	0.0%	0.6%	9.0%
	NSW	3033	0	288	1183	1563	360	2673	360	174	2343	155
		53.2%	0.0%	29.9%	56.1%	66.5%	34.5%	57.5%	34.5%	32.0%	59.8%	81.7%
	QLD	1327	248	449	265	366	328	999	328	205	794	0
		23.3%	90.3%	46.7%	12.5%	15.6%	31.4%	21.5%	31.4%	37.7%	20.3%	0.0%
	SA	567	14	142	129	282	118	449	118	17	428	4
		10.0%	5.1%	14.7%	6.1%	12.0%	11.3%	9.6%	11.3%	3.0%	10.9%	2.3%
	TAS	102	7	50	18	28	76	27	76	0	27	0
		1.8%	2.4%	5.1%	0.9%	1.2%	7.2%	0.6%	7.2%	0.0%	0.7%	0.0%
	VIC	516	1	10	443	62	122	394	122	149	235	11
		9.1%	0.4%	1.0%	21.0%	2.7%	11.7%	8.5%	11.7%	27.3%	6.0%	5.6%
	NT	74	4	16	21	33	6	68	6	0	65	3
		1.3%	1.5%	1.6%	1.0%	1.4%	0.6%	1.5%	0.6%	0.0%	1.7%	1.4%
	WA	1	1	0	0	0	1	0	1	0	0	0
		0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

SAMPLE - STATE

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) - DETAILED				
BASE ALL VENUES		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
STATE - CODED	ACT	76	20	17	4	35	20	17	4	34	1
		1 3%	1 1%	1 3%	0 3%	3 3%	1 1%	1 3%	0 3%	3 3%	7 7%
	NSW	3033	1175	788	645	424	1175	788	645	423	1
		53 2%	65 6%	60 8%	41 0%	40 9%	65 6%	60 8%	41 0%	41 4%	7 7%
	QLD	1327	402	242	460	223	402	242	460	219	4
		23 3%	22 5%	18 7%	29 2%	21 6%	22 5%	18 7%	29 2%	21 4%	30 8%
	SA	567	125	208	233	1	125	208	233	0	1
		10 0%	7 0%	16 0%	14 8%	0 1%	7 0%	16 0%	14 8%	0 0%	7 7%
	TAS	102	0	31	70	2	0	31	70	0	2
		1 8%	0 0%	2 4%	4 4%	0 2%	0 0%	2 4%	4 4%	0 0%	15 4%
	VIC	516	21	0	156	339	21	0	156	338	1
		9 1%	1 2%	0 0%	9 9%	32 7%	1 2%	0 0%	9 9%	33 1%	7 7%
	NT	74	48	11	4	11	48	11	4	9	2
		1 3%	2 7%	0 8%	0 3%	1 0%	2 7%	0 8%	0 3%	0 9%	15 4%
	WA	1	0	0	0	1	0	0	0	0	1
		0 0%	0 0%	0 0%	0 0%	0 1%	0 0%	0 0%	0 0%	0 0%	7 7%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.5 Does the venue have a website?

				VENUE TYPE			REGION		STATE							
BASE:ALL VENUES			Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size		Sample Size	367	188	166	13	152	215	24	101	84	27	47	51	32	1
		Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
Q 5 Does the venue have a website?		Yes	3345	1701	1631	13	1588	1758	59	1470	961	285	74	454	41	1
			58 7%	50 6%	70 3%	100 0%	76 8%	48 4%	77 5%	48 5%	72 5%	50 2%	72 5%	87 9%	55 9%	100 0%
		No	2351	1662	689	0	478	1872	17	1563	366	282	28	62	33	0
			41 3%	49 4%	29 7%	0 0%	23 2%	51 6%	22 5%	51 5%	27 5%	49 8%	27 5%	12 1%	44 1%	0 0%
TOTAL			5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
			100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.5 Does the venue have a website?

			VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
BASE:ALL VENUES		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
Q 5 Does the venue have a website?	Yes	3345	274	962	2109	0	953	2392	953	376	1942	73
		58 7%	100 0%	100 0%	100 0%	0 0%	91 2%	51 4%	91 2%	69 1%	49 6%	38 6%
	No	2351	0	0	0	2351	92	2259	92	169	1974	117
		41 3%	0 0%	0 0%	0 0%	100 0%	8 8%	48 6%	8 8%	30 9%	50 4%	61 4%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.5 Does the venue have a website?

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
BASE ALL VENUES		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
Q 5 Does the venue have a website?	Yes	3345	697	643	1049	957	697	643	1049	944	13
		58 7%	38 9%	49 6%	66 7%	92 3%	38 9%	49 6%	66 7%	92 2%	100 0%
	No	2351	1094	654	523	79	1094	654	523	79	0
		41 3%	61 1%	50 4%	33 3%	7 7%	61 1%	50 4%	33 3%	7 8%	0 0%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

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Q.7 Does this venue appear to have pokies?

			VENUE TYPE			REGION		STATE							
BASE: HAS WEBSITE		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	242	108	121	13	124	118	18	51	63	27	18	45	19	1
	Wtd Popn	3345	1701	1631	13	1588	1758	59	1470	961	285	74	454	41	1
Q 7 Does this venue appear to have pokies?	Yes	1237	630	596	11	561	676	8	288	697	156	56	11	20	1
		37 0%	37 0%	36 5%	84 6%	35 3%	38 5%	14 3%	19 6%	72 5%	54 7%	75 7%	2 4%	48 3%	100 0%
	No	2109	1071	1035	2	1027	1082	51	1183	265	129	18	443	21	0
		63 0%	63 0%	63 5%	15 4%	64 7%	61 5%	85 7%	80 4%	27 5%	45 3%	24 3%	97 6%	51 7%	0 0%
TOTAL		3345	1701	1631	13	1588	1758	59	1470	961	285	74	454	41	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.7 Does this venue appear to have pokies?

			VENUE WEBSITE INFO			LP (CONFIRMED)		VENUE DETAILS			
BASE: HAS WEBSITE		Total	LP & pokies evident	Pokies only evident	Neither evident	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	242	32	71	139	87	155	87	26	120	9
	Wtd Popn	3345	274	962	2109	953	2392	953	376	1942	73
Q 7 Does this venue appear to have pokies?	Yes	1237	274	962	0	516	721	516	171	524	26
		37 0%	100 0%	100 0%	0 0%	54 1%	30 1%	54 1%	45 4%	27 0%	36 0%
	No	2109	0	0	2109	438	1671	438	206	1419	47
		63 0%	0 0%	0 0%	100 0%	45 9%	69 9%	45 9%	54 6%	73 0%	64 0%
TOTAL		3345	274	962	2109	953	2392	953	376	1942	73
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.7 Does this venue appear to have pokies?

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
BASE HAS WEBSITE		Total	Very small (up to 10 EGMs)	Sma l (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	242	47	38	75	82	47	38	75	69	13
	Wtd Popn	3345	697	643	1049	957	697	643	1049	944	13
Q 7 Does this venue appear to have pokies?	Yes	1237	231	211	392	402	231	211	392	391	11
		37 0%	33 2%	32 9%	37 4%	42 0%	33 2%	32 9%	37 4%	41 5%	84 6%
	No	2109	466	431	657	554	466	431	657	552	2
		63 0%	66 8%	67 1%	62 6%	58 0%	66 8%	67 1%	62 6%	58 5%	15 4%
TOTAL		3345	697	643	1049	957	697	643	1049	944	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.8 Does this venue appear to have a loyalty program?

			VENUE TYPE			REGION		STATE							
BASE: POKIES APPARENT ON WEBSITE		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	103	42	50	11	52	51	2	10	47	17	14	2	10	1
	Wtd Popn	1237	630	596	11	561	676	8	288	697	156	56	11	20	1
Q 8 Does this venue appear to have a loyalty program?	Yes	274	81	182	11	124	151	0	0	248	14	7	1	4	1
		22 2%	12 9%	30 6%	100 0%	22 1%	22 3%	0 0%	0 0%	35 5%	8 9%	11 6%	9 1%	21 0%	100 0%
	No	962	549	414	0	437	526	8	288	449	142	50	10	16	0
		77 8%	87 1%	69 4%	0 0%	77 9%	77 7%	100 0%	100 0%	64 5%	91 1%	88 4%	90 9%	79 0%	0 0%
TOTAL		1237	630	596	11	561	676	8	288	697	156	56	11	20	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.8 Does this venue appear to have a loyalty program?

			VENUE WEBSITE INFO		LP (CONFIRMED)		VENUE DETAILS			
BASE: POKIES APPARENT ON WEBSITE		Total	LP & pokies evident	Pokies only evident	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	103	32	71	54	49	54	11	37	1
	Wtd Popn	1237	274	962	516	721	516	171	524	26
Q.8. Does this venue appear to have a loyalty program?	Yes	274	274	0	260	14	260	0	14	0
		22.2%	100.0%	0.0%	50.5%	1.9%	50.5%	0.0%	2.7%	0.0%
	No	962	0	962	255	707	255	171	510	26
		77.8%	0.0%	100.0%	49.5%	98.1%	49.5%	100.0%	97.3%	100.0%
TOTAL		1237	274	962	516	721	516	171	524	26
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q.8 Does this venue appear to have a loyalty program?

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
BASE: POKIES APPARENT ON WEBSITE		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	103	13	18	34	38	13	18	34	27	11
	Wtd Popn	1237	231	211	392	402	231	211	392	391	11
Q 8 Does this venue appear to have a loyalty program?	Yes	274	0	14	70	191	0	14	70	180	11
		22 2%	0 0%	6 6%	17 8%	47 4%	0 0%	6 6%	17 8%	45 9%	100 0%
	No	962	231	197	322	211	231	197	322	211	0
		77 8%	100 0%	93 4%	82 2%	52 6%	100 0%	93 4%	82 2%	54 1%	0 0%
TOTAL		1237	231	211	392	402	231	211	392	391	11
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.9 Is the program prominent on the website?

			VENUE TYPE			REGION		STATE					
BASE: POKIES & LP APPARENT ON WEBSITE		Total	Hotel	Club	Casino	Metro	Non metro	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	32	5	16	11	17	15	20	4	3	1	3	1
	Wtd Popn	274	81	182	11	124	151	248	14	7	1	4	1
Q 9 Is the program prominent on the website?	Yes - home page	130	0	125	5	73	58	128	0	0	1	0	1
		47 5%	0 0%	68 8%	45 5%	58 6%	38 3%	51 8%	0 0%	0 0%	100 0%	0 0%	100 0%
	Yes - easy to navigate to	93	57	29	6	37	55	72	14	2	0	4	0
		33 7%	70 8%	15 9%	54 5%	30 1%	36 7%	29 2%	100 0%	30 8%	0 0%	100 0%	0 0%
	No - difficult to find on website	52	24	28	0	14	38	47	0	5	0	0	0
		18 8%	29 2%	15 3%	0 0%	11 2%	25 0%	19 0%	0 0%	69 2%	0 0%	0 0%	0 0%
TOTAL		274	81	182	11	124	151	248	14	7	1	4	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.9 Is the program prominent on the website?

			VENUE WEBSITE INFO	LP (CONFIRMED)		VENUE DETAILS	
BASE: POKIES & LP APPARENT ON WEBSITE		Total	LP & pokies evident	Yes	No	Loyalty	No programs
Sample Size	Sample Size	32	32	31	1	31	1
	Wtd Popn	274	274	260	14	260	14
Q.9. Is the program prominent on the website?	Yes home page	130	130	116	14	116	14
		47.5%	47.5%	44.7%	100.0%	44.7%	100.0%
	Yes easy to navigate to	93	93	93	0	93	0
		33.7%	33.7%	35.5%	0.0%	35.5%	0.0%
	No difficult to find on website	52	52	52	0	52	0
		18.8%	18.8%	19.8%	0.0%	19.8%	0.0%
TOTAL		274	274	260	14	260	14
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.9 Is the program prominent on the website?

			VENUE SIZE (NO EGMs)			VENUE SIZE (NO EGMs) - DETAILED			
BASE: POKIES & LP APPARENT ON WEBSITE		Total	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	32	1	7	24	1	7	13	11
	Wtd Popn	274	14	70	191	14	70	180	11
Q 9 Is the program prominent on the website?	Yes - home page	130	0	0	130	0	0	125	5
		47 5%	0 0%	0 0%	68 3%	0 0%	0 0%	69 7%	45 5%
	Yes - easy to navigate to	93	0	65	27	0	65	21	6
		33 7%	0 0%	93 5%	14 3%	0 0%	93 5%	11 9%	54 5%
	No - difficult to find on website	52	14	5	33	14	5	33	0
		18 8%	100 0%	6 5%	17 3%	100 0%	6 5%	18 4%	0 0%
TOTAL		274	14	70	191	14	70	180	11
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

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Q.10 Does the loyalty program have a specific name?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE TYPE			REGION		STATE					
			Hotel	Club	Casino	Metro	Non metro	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	32	5	16	11	17	15	20	4	3	1	3	1
	Wtd Popn	274	81	182	11	124	151	248	14	7	1	4	1
Q 10 Does the loyalty program have a specific name?	Yes	143	81	50	11	48	95	122	10	7	1	2	1
		51 9%	100 0%	27 7%	100 0%	38 5%	63 0%	49 4%	69 1%	100 0%	100 0%	47 6%	100 0%
	No	132	0	132	0	76	56	125	4	0	0	2	0
		48 1%	0 0%	72 3%	0 0%	61 5%	37 0%	50 6%	30 9%	0 0%	0 0%	52 4%	0 0%
TOTAL		274	81	182	11	124	151	248	14	7	1	4	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.10 Does the loyalty program have a specific name?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE WEBSITE INFO	LP (CONFIRMED)		VENUE DETAILS	
			LP & pokies evident	Yes	No	Loyalty	No programs
Sample Size	Sample Size	32	32	31	1	31	1
	Wtd Popn	274	274	260	14	260	14
Q.10. Does the loyalty program have a specific name?	Yes	143	143	143	0	143	0
		51.9%	51.9%	54.7%	0.0%	54.7%	0.0%
	No	132	132	118	14	118	14
		48.1%	48.1%	45.3%	100.0%	45.3%	100.0%
TOTAL		274	274	260	14	260	14
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.10 Does the loyalty program have a specific name?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE SIZE (NO EGMs)			VENUE SIZE (NO EGMs) - DETAILED			
			Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	32	1	7	24	1	7	13	11
	Wtd Popn	274	14	70	191	14	70	180	11
Q 10 Does the loyalty program have a specific name?	Yes	143	0	51	91	0	51	80	11
		51 9%	0 0%	73 8%	47 7%	0 0%	73 8%	44 5%	100 0%
	No	132	14	18	100	14	18	100	0
		48 1%	100 0%	26 2%	52 3%	100 0%	26 2%	55 5%	0 0%
TOTAL		274	14	70	191	14	70	180	11
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.11a Is the program linked to gambling activities at the venue?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE TYPE			REGION		STATE					
			Hotel	Club	Casino	Metro	Non metro	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	32	5	16	11	17	15	20	4	3	1	3	1
	Wtd Popn	274	81	182	11	124	151	248	14	7	1	4	1
Q 11 Linked to gambling activities	Yes - time played	33	19	14	0	14	19	33	0	0	0	0	0
		12 1%	23 6%	7 6%	0 0%	11 2%	12 7%	13 4%	0 0%	0 0%	0 0%	0 0%	0 0%
	Yes - amount spent	196	57	128	11	111	85	187	1	2	1	4	1
		71 4%	70 8%	70 0%	100 0%	89 6%	56 5%	75 4%	7 2%	30 8%	100 0%	100 0%	100 0%
	Yes - other	9	0	9	0	9	0	0	9	0	0	0	0
		3 1%	0 0%	4 7%	0 0%	7 0%	0 0%	0 0%	61 9%	0 0%	0 0%	0 0%	0 0%
	Unsure	70	24	46	0	4	65	61	4	5	0	0	0
		25 4%	29 2%	25 3%	0 0%	3 5%	43 5%	24 6%	30 9%	69 2%	0 0%	0 0%	0 0%
TOTAL		274	81	182	11	124	151	248	14	7	1	4	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

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Q.11a Is the program linked to gambling activities at the venue?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE WEBSITE INFO	LP (CONFIRMED)		VENUE DETAILS	
			LP & pokies evident	Yes	No	Loyalty	No programs
Sample Size	Sample Size	32	32	31	1	31	1
	Wtd Popn	274	274	260	14	260	14
Q.11 Linked to gambling activities	Yes time played	33	33	33	0	33	0
		12.1%	12.1%	12.7%	0.0%	12.7%	0.0%
	Yes amount spent	196	196	196	0	196	0
		71.4%	71.4%	75.3%	0.0%	75.3%	0.0%
	Yes other	9	9	9	0	9	0
		3.1%	3.1%	3.3%	0.0%	3.3%	0.0%
	Unsure	70	70	56	14	56	14
		25.4%	25.4%	21.4%	100.0%	21.4%	100.0%
TOTAL		274	274	260	14	260	14
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.11a Is the program linked to gambling activities at the venue?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE SIZE (NO EGMs)			VENUE SIZE (NO EGMs) - DETAILED			
			Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	32	1	7	24	1	7	13	11
	Wtd Popn	274	14	70	191	14	70	180	11
Q 11 Linked to gambling activities	Yes - time played	33	0	0	33	0	0	33	0
		12 1%	0 0%	0 0%	17 3%	0 0%	0 0%	18 4%	0 0%
	Yes - amount spent	196	0	19	177	0	19	166	11
		71 4%	0 0%	27 5%	92 7%	0 0%	27 5%	92 3%	100 0%
	Yes - other	9	0	9	0	0	9	0	0
		3 1%	0 0%	12 4%	0 0%	0 0%	12 4%	0 0%	0 0%
	Unsure	70	14	42	14	14	42	14	0
		25 4%	100 0%	60 1%	7 3%	100 0%	60 1%	7 7%	0 0%
TOTAL		274	14	70	191	14	70	180	11
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.11b Is the program linked to non-gambling activities at the venue?

BASE POKIES & LP APPARENT ON WEBSITE		Total	VENUE TYPE			REGION		STATE					
			Hotel	Club	Casino	Metro	Non metro	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	32	5	16	11	17	15	20	4	3	1	3	1
	Wtd Popn	274	81	182	11	124	151	248	14	7	1	4	1
Q 12 Linked to non-gambling activities	Yes - spend at the venue on dinner/drinks	132	0	122	10	86	46	114	10	2	1	4	1
		48 2%	0 0%	67 1%	90 9%	69 8%	30 4%	46 2%	69 1%	30 8%	100 0%	100 0%	100 0%
	Yes - other	81	0	72	9	49	32	73	0	2	1	4	1
		29 5%	0 0%	39 4%	81 8%	39 5%	21 2%	29 3%	0 0%	30 8%	100 0%	100 0%	100 0%
	No	1	0	0	1	0	1	1	0	0	0	0	0
		0 4%	0 0%	0 0%	9 1%	0 0%	0 7%	0 4%	0 0%	0 0%	0 0%	0 0%	0 0%
	Unsure	141	81	60	0	37	104	132	4	5	0	0	0
		51 4%	100 0%	32 9%	0 0%	30 2%	68 9%	53 4%	30 9%	69 2%	0 0%	0 0%	0 0%
TOTAL		274	81	182	11	124	151	248	14	7	1	4	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

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Q.11b Is the program linked to non-gambling activities at the venue?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE SIZE (NO EGMs)			LP (CONFIRMED)		VENUE DETAILS	
			Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Yes	No	Loyalty	No programs
Sample Size	Sample Size	32	1	7	24	31	1	31	1
	Wtd Popn	274	14	70	191	260	14	260	14
Q 12 Linked to non-gambling activities	Yes - spend at the venue on dinner/drinks	132	0	23	110	132	0	132	0
		48 2%	0 0%	32 4%	57 5%	50 8%	0 0%	50 8%	0 0%
	Yes - other	81	0	0	81	81	0	81	0
		29 5%	0 0%	0 0%	42 4%	31 0%	0 0%	31 0%	0 0%
	No	1	0	0	1	1	0	1	0
		0 4%	0 0%	0 0%	0 5%	0 4%	0 0%	0 4%	0 0%
	Unsure	141	14	47	80	127	14	127	14
		51 4%	100 0%	67 6%	42 0%	48 8%	100 0%	48 8%	100 0%
TOTAL		274	14	70	191	260	14	260	14
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.11b Is the program linked to non-gambling activities at the venue?

BASE: POKIES & LP APPARENT ON WEBSITE		Total	VENUE WEBSITE INFO	VENUE SIZE (NO EGMs) - DETAILED			
			LP & pokies evident	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	32	32	1	7	13	11
	Wtd Popn	274	274	14	70	180	11
Q 12 Linked to non-gambling activities	Yes - spend at the venue on dinner/drinks	132	132	0	23	100	10
		48 2%	48 2%	0 0%	32 4%	55 5%	90 9%
	Yes - other	81	81	0	0	72	9
		29 5%	29 5%	0 0%	0 0%	40 0%	81 8%
	No	1	1	0	0	0	1
		0 4%	0 4%	0 0%	0 0%	0 0%	9 1%
	Unsure	141	141	14	47	80	0
		51 4%	51 4%	100 0%	67 6%	44 5%	0 0%
TOTAL		274	274	14	70	180	11
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.12 Does the venue have a loyalty program?

BASE:ALL VENUES		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
Q 13 Does the venue have a loyalty program?	Yes	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		18 3%	12 9%	25 8%	92 3%	25 1%	14 5%	44 2%	11 9%	24 7%	20 9%	74 0%	23 6%	8 6%	100 0%
	No	4651	2930	1721	1	1547	3105	42	2673	999	449	27	394	68	0
		81 7%	87 1%	74 2%	7 7%	74 9%	85 5%	55 8%	88 1%	75 3%	79 1%	26 0%	76 4%	91 4%	0 0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.12 Does the venue have a loyalty program?

BASE:ALL VENUES		Total	VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
Q 13 Does the venue have a loyalty program?	Yes	1045	260	255	438	92	1045	0	1045	0	0	0
		18 3%	94 9%	26 5%	20 8%	3 9%	100 0%	0 0%	100 0%	0 0%	0 0%	0 0%
	No	4651	14	707	1671	2259	0	4651	0	545	3916	190
		81 7%	5 1%	73 5%	79 2%	96 1%	0 0%	100 0%	0 0%	100 0%	100 0%	100 0%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.12 Does the venue have a loyalty program?

			VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
BASE ALL VENUES		Total	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
Q 13 Does the venue have a loyalty program?	Yes	1045	14	36	357	638	14	36	357	626	12
		18 3%	0 8%	2 8%	22 7%	61 6%	0 8%	2 8%	22 7%	61 2%	92 3%
	No	4651	1777	1261	1216	398	1777	1261	1216	397	1
		81 7%	99 2%	97 2%	77 3%	38 4%	99 2%	97 2%	77 3%	38 8%	7 7%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A1 How does the program work?

			VENUE TYPE			REGION		STATE							
BASE AUDITED BY PHONE		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	99	38	49	12	49	50	8	14	25	14	20	13	4	1
	Wtd Popn	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
Q A1 How program works	Based on time spent on pokies	57	36	20	1	34	23	0	1	33	21	0	0	2	0
		5 5%	8 2%	3 4%	8 3%	6 5%	4 5%	0 0%	0 3%	10 1%	17 6%	0 0%	0 0%	34 4%	0 0%
	Based on money spent on pokies	257	89	160	7	164	93	17	115	97	25	2	1	0	0
		24 6%	20 6%	26 8%	58 3%	31 5%	17 6%	50 0%	31 8%	29 6%	21 3%	2 6%	0 8%	0 0%	0 0%
	Based on playing pokies NFI	39	17	23	0	35	4	0	0	14	25	0	0	0	0
		3 7%	3 8%	3 8%	0 0%	6 7%	0 8%	0 0%	0 0%	4 2%	21 3%	0 0%	0 0%	0 0%	0 0%
	Based on money spent at venue e g gaming, food, drinks etc	283	29	249	5	166	117	0	132	118	10	2	22	0	0
		27 1%	6 7%	41 5%	41 7%	31 9%	22 3%	0 0%	36 7%	35 9%	8 1%	2 6%	17 7%	0 0%	0 0%
	Based on money spent NFI	350	96	250	4	163	187	17	166	104	46	2	10	4	1
		33 5%	22 3%	41 6%	33 3%	31 4%	35 6%	50 0%	46 2%	31 6%	38 9%	2 6%	8 2%	65 6%	100 0%
	Earn points (points system)	819	260	547	12	378	441	34	360	314	93	2	11	4	1
		78 4%	59 9%	91 3%	100 0%	72 8%	83 9%	100 0%	100 0%	95 8%	78 7%	2 6%	9 0%	65 6%	100 0%
	Earn dollars (money system)	34	30	4	0	30	4	4	0	0	0	0	30	0	0
		3 3%	6 9%	0 7%	0 0%	5 8%	0 8%	12 5%	0 0%	0 0%	0 0%	0 0%	24 5%	0 0%	0 0%
	Earn discounts/ vouchers to spend on food/ drink/ other services	2	0	2	0	2	0	0	0	0	0	2	0	0	0
		0 2%	0 0%	0 3%	0 0%	0 4%	0 0%	0 0%	0 0%	0 0%	0 0%	2 6%	0 0%	0 0%	0 0%
	Earn entry into prize draws	9	5	4	0	9	0	0	0	0	4	5	0	0	0
		0 8%	1 0%	0 7%	0 0%	1 7%	0 0%	0 0%	0 0%	0 0%	3 6%	6 0%	0 0%	0 0%	0 0%
	Automatic membership vouchers/ discounts/ promotions (i e upon joining)	193	176	17	0	104	89	0	0	19	0	74	100	0	0
		18 5%	40 7%	2 8%	0 0%	20 1%	16 9%	0 0%	0 0%	5 8%	0 0%	97 4%	82 3%	0 0%	0 0%
	Other	38	10	28	0	0	38	0	0	28	0	0	10	0	0
		3 6%	2 3%	4 6%	0 0%	0 0%	7 2%	0 0%	0 0%	8 5%	0 0%	0 0%	8 2%	0 0%	0 0%
TOTAL		1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A1 How does the program work?

BASE: AUDITED BY PHONE		Total	VENUE WEBSITE INFO: LP & pokies evident	VENUE WEBSITE INFO: Pokies only evident	VENUE WEBSITE INFO: Neither evident	VENUE WEBSITE INFO: No website	LP (CONFIRMED): Yes	VENUE DETAILS: Loyalty
Sample Size	Sample Size	99	31	23	33	12	99	99
	Wtd Popn	1045	260	255	438	92	1045	1045
Q A1 How program works	Based on time spent on pokies	57	33	7	18	0	57	57
		5 5%	12 7%	2 6%	4 0%	0 0%	5 5%	5 5%
	Based on money spent on pokies	257	104	4	131	17	257	257
		24 6%	40 1%	1 7%	30 0%	18 1%	24 6%	24 6%
	Based on playing pokies NFI	39	14	4	17	4	39	39
		3 7%	5 3%	1 7%	3 8%	4 7%	3 7%	3 7%
	Based on money spent at venue e g gaming, food, drinks etc	283	98	45	126	14	283	283
		27 1%	37 7%	17 5%	28 9%	15 2%	27 1%	27 1%
	Based on money spent NFI	350	71	142	118	20	350	350
		33 5%	27 1%	55 5%	26 9%	22 0%	33 5%	33 5%
	Earn points (points system)	819	242	213	292	72	819	819
		78 4%	92 9%	83 4%	66 8%	78 7%	78 4%	78 4%
	Earn dollars (money system)	34	0	0	34	0	34	34
		3 3%	0 0%	0 0%	7 8%	0 0%	3 3%	3 3%
	Earn discounts/ vouchers to spend on food/ drink/ other services	2	0	0	0	2	2	2
		0 2%	0 0%	0 0%	0 0%	2 2%	0 2%	0 2%
	Earn entry into prize draws	9	0	4	0	5	9	9
		0 8%	0 0%	1 7%	0 0%	4 9%	0 8%	0 8%
	Automatic membership vouchers/ discounts/ promotions (i e upon joining)	193	24	32	118	20	193	193
		18 5%	9 1%	12 3%	27 0%	21 3%	18 5%	18 5%
	Other	38	14	14	10	0	38	38
		3 6%	5 3%	5 5%	2 3%	0 0%	3 6%	3 6%
TOTAL		1045	260	255	438	92	1045	1045
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A1 How does the program work?

BASE AUDITED BY PHONE		Total	VENUE SIZE (NO EGMs): Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	VENUE SIZE (NO EGMs) DETAILED: Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	99	1	7	35	56	1	7	35	44	12
	Wtd Popn	1045	14	36	357	638	14	36	357	626	12
Q A1 How program works	Based on time spent on pokies	57	0	4	17	36	0	4	17	35	1
		5 5%	0 0%	12 1%	4 6%	5 7%	0 0%	12 1%	4 6%	5 6%	8 3%
	Based on money spent on pokies	257	0	0	83	174	0	0	83	167	7
		24 6%	0 0%	0 0%	23 2%	27 2%	0 0%	0 0%	23 2%	26 6%	58 3%
	Based on playing pokies NFI	39	0	0	25	14	0	0	25	14	0
		3 7%	0 0%	0 0%	7 1%	2 2%	0 0%	0 0%	7 1%	2 2%	0 0%
	Based on money spent at venue e g gaming, food, drinks etc	283	0	0	66	217	0	0	66	212	5
		27 1%	0 0%	0 0%	18 6%	34 0%	0 0%	0 0%	18 6%	33 8%	41 7%
	Based on money spent NFI	350	14	14	101	221	14	14	101	217	4
		33 5%	100 0%	39 0%	28 4%	34 6%	100 0%	39 0%	28 4%	34 6%	33 3%
	Earn points (points system)	819	14	14	269	522	14	14	269	510	12
		78 4%	100 0%	39 0%	75 5%	81 8%	100 0%	39 0%	75 5%	81 4%	100 0%
	Earn dollars (money system)	34	0	0	0	34	0	0	0	34	0
		3 3%	0 0%	0 0%	0 0%	5 3%	0 0%	0 0%	0 0%	5 4%	0 0%
	Earn discounts/ vouchers to spend on food/ drink/ other services	2	0	0	2	0	0	0	2	0	0
		0 2%	0 0%	0 0%	0 6%	0 0%	0 0%	0 0%	0 6%	0 0%	0 0%
	Earn entry into prize draws	9	0	0	9	0	0	0	9	0	0
		0 8%	0 0%	0 0%	2 5%	0 0%	0 0%	0 0%	2 5%	0 0%	0 0%
	Automatic membership vouchers/ discounts/ promotions (i e upon joining)	193	0	18	56	119	0	18	56	119	0
		18 5%	0 0%	49 0%	15 7%	18 7%	0 0%	49 0%	15 7%	19 1%	0 0%
	Other	38	0	14	0	24	0	14	0	24	0
		3 6%	0 0%	39 0%	0 0%	3 7%	0 0%	39 0%	0 0%	3 8%	0 0%
TOTAL		1045	14	36	357	638	14	36	357	626	12
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A2 How do you build up reward points?

BASE AUDITED BY PHONE & HAVE POINTS SYSTEM		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	66	13	41	12	31	35	8	14	24	12	2	2	3	1
	Wtd Popn	823	260	552	12	378	445	34	360	314	97	2	11	4	1
Q A2 How build up reward points	Money spent at venue NFI	306	52	250	4	108	198	0	132	131	37	2	1	2	1
		37 2%	20 1%	45 3%	33 3%	28 6%	44 5%	0 0%	36 7%	41 6%	38 4%	100 0%	9 1%	52 4%	100 0%
	Money spent on food/ drink	318	101	214	4	165	153	4	132	116	56	0	10	0	0
		38 6%	38 7%	38 7%	33 3%	43 6%	34 5%	12 5%	36 7%	37 0%	57 2%	0 0%	90 9%	0 0%	0 0%
	Money spent on services/ other	176	36	136	4	124	52	4	132	22	18	0	0	0	0
		21 4%	13 8%	24 7%	33 3%	32 9%	11 6%	12 5%	36 7%	7 1%	18 0%	0 0%	0 0%	0 0%	0 0%
	Money spent on pokies/ gaming	615	214	392	9	297	317	21	307	211	72	0	0	2	1
		74 7%	82 4%	71 0%	75 0%	78 6%	71 3%	62 5%	85 3%	67 3%	74 2%	0 0%	0 0%	47 6%	100 0%
	Playing pokies NFI	58	19	39	0	31	28	13	26	19	0	0	0	0	0
		7 1%	7 4%	7 1%	0 0%	8 1%	6 2%	37 5%	7 3%	6 1%	0 0%	0 0%	0 0%	0 0%	0 0%
	Other	23	19	4	0	0	23	0	0	19	4	0	0	0	0
		2 8%	7 4%	0 8%	0 0%	0 0%	5 3%	0 0%	0 0%	6 1%	4 4%	0 0%	0 0%	0 0%	0 0%
TOTAL		823	260	552	12	378	445	34	360	314	97	2	11	4	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A2 How do you build up reward points?

BASE: AUDITED BY PHONE & HAVE POINTS SYSTEM		Total	VENUE WEBSITE INFO				LP (CONFIRMED)	VENUE DETAILS
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	Loyalty
Sample Size	Sample Size	66	29	14	17	6	66	66
	Wtd Popn	823	242	217	292	72	823	823
Q A2 How build up reward points	Money spent at venue NFI	306	109	71	96	30	306	306
		37 2%	45 0%	32 8%	32 8%	42 3%	37 2%	37 2%
	Money spent on food/ drink	318	116	104	79	18	318	318
		38 6%	48 0%	48 1%	27 2%	25 3%	38 6%	38 6%
	Money spent on services/ other	176	23	84	69	0	176	176
		21 4%	9 6%	38 5%	23 8%	0 0%	21 4%	21 4%
	Money spent on pokies/ gaming	615	181	142	270	22	615	615
		74 7%	74 8%	65 3%	92 3%	31 1%	74 7%	74 7%
	Playing pokies NFI	58	0	26	13	19	58	58
		7 1%	0 0%	12 2%	4 3%	26 6%	7 1%	7 1%
	Other	23	0	4	0	19	23	23
		2 8%	0 0%	2 0%	0 0%	26 6%	2 8%	2 8%
TOTAL		823	242	217	292	72	823	823
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A2 How do you build up reward points?

BASE AUDITED BY PHONE & HAVE POINTS SYSTEM		Total	VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
			Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	66	1	2	19	44	1	2	19	32	12
	Wtd Popn	823	14	18	269	522	14	18	269	510	12
Q A2 How build up reward po nts	Money spent at venue NFI	306	0	14	65	227	0	14	65	223	4
		37 2%	0 0%	76 4%	24 3%	43 5%	0 0%	76 4%	24 3%	43 8%	33 3%
	Money spent on food/ drink	318	14	0	93	211	14	0	93	207	4
		38 6%	100 0%	0 0%	34 5%	40 5%	100 0%	0 0%	34 5%	40 6%	33 3%
	Money spent on services/ other	176	0	0	36	140	0	0	36	136	4
		21 4%	0 0%	0 0%	13 3%	26 9%	0 0%	0 0%	13 3%	26 7%	33 3%
	Money spent on pokies/ gaming	615	14	14	197	390	14	14	197	381	9
		74 7%	100 0%	76 4%	73 2%	74 7%	100 0%	76 4%	73 2%	74 7%	75 0%
	Play ng pokies NFI	58	0	0	23	35	0	0	23	35	0
		7 1%	0 0%	0 0%	8 7%	6 7%	0 0%	0 0%	8 7%	6 8%	0 0%
	Other	23	0	4	19	0	0	4	19	0	0
		2 8%	0 0%	23 6%	7 1%	0 0%	0 0%	23 6%	7 1%	0 0%	0 0%
TOTAL		823	14	18	269	522	14	18	269	510	12
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A3 What sorts of rewards can you get?

BASE AUDITED BY PHONE		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	99	38	49	12	49	50	8	14	25	14	20	13	4	1
	Wtd Popn	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
Q A3 Sorts of rewards	Reedem/ exchange points for cash NFI	127	88	36	3	77	50	13	0	39	71	2	0	2	0
		12 2%	20 3%	6 1%	25 0%	14 8%	9 6%	37 5%	0 0%	12 0%	60 2%	2 6%	0 0%	34 4%	0 0%
	Reedem/ exchange points to purchase meals/drinks/services in venue	409	133	268	8	244	165	13	307	39	35	1	11	2	1
		39 2%	30 8%	44 7%	66 7%	46 9%	31 5%	37 5%	85 3%	12 0%	29 4%	1 3%	9 0%	31 3%	100 0%
	Redeem/ exchange points for prizes/ gifts showcase	116	34	82	0	62	54	0	61	56	0	0	0	0	0
		11 1%	7 9%	13 7%	0 0%	11 9%	10 3%	0 0%	16 8%	17 0%	0 0%	0 0%	0 0%	0 0%	0 0%
	Redeem/ exchange points for external gift vouchers i e fuel card, Coles Myer etc	30	0	26	4	28	2	0	26	0	0	2	0	2	0
		2 9%	0 0%	4 4%	33 3%	5 5%	0 4%	0 0%	7 3%	0 0%	0 0%	2 6%	0 0%	31 3%	0 0%
	Gaming vouchers/ credit	250	139	109	2	106	144	0	53	80	25	60	30	2	0
		23 9%	32 0%	18 2%	16 7%	20 5%	27 3%	0 0%	14 7%	24 4%	21 3%	79 5%	24 5%	31 3%	0 0%
	Meals/ drinks discounts or vouchers	184	45	135	5	75	109	0	27	120	17	9	11	0	1
		17 6%	10 3%	22 4%	41 7%	14 5%	20 8%	0 0%	7 6%	36 5%	14 0%	11 9%	8 7%	0 0%	100 0%
	Birthday promotions/ vouchers	67	26	42	0	58	9	0	0	42	17	9	0	0	0
		6 4%	5 9%	7 0%	0 0%	11 2%	1 7%	0 0%	0 0%	12 7%	14 0%	11 9%	0 0%	0 0%	0 0%
	Vouchers NFI/ venue credit NFI	102	60	40	2	61	41	0	26	15	0	0	60	0	1
		9 8%	13 8%	6 7%	16 7%	11 7%	7 9%	0 0%	7 3%	4 6%	0 0%	0 0%	49 0%	0 0%	100 0%
	Entry into/ chance to win prize draws or jackpots	284	107	175	2	101	184	0	26	204	25	14	11	4	0
		27 2%	24 6%	29 3%	16 7%	19 4%	34 9%	0 0%	7 3%	62 2%	21 3%	17 9%	8 7%	68 8%	0 0%
	Free meals or drinks	64	14	48	2	30	33	0	0	42	0	18	0	4	0
		6 1%	3 1%	8 0%	16 7%	5 8%	6 3%	0 0%	0 0%	12 7%	0 0%	23 2%	0 0%	68 8%	0 0%
	Free or discounted parking	3	0	0	3	2	1	0	1	1	0	0	0	0	1
		0 3%	0 0%	0 0%	25 0%	0 4%	0 2%	0 0%	0 3%	0 3%	0 0%	0 0%	0 0%	0 0%	100 0%
	Other	9	0	8	1	0	9	8	0	1	0	0	0	0	0
		0 9%	0 0%	1 4%	8 3%	0 0%	1 8%	25 0%	0 0%	0 3%	0 0%	0 0%	0 0%	0 0%	0 0%
TOTAL		1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A3 What sorts of rewards can you get?

BASE: AUDITED BY PHONE		Total	VENUE WEBSITE INFO				LP (CONFIRMED)	VENUE DETAILS
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	Loyalty
Sample Size	Sample Size	99	31	23	33	12	99	99
	Wtd Popn	1045	260	255	438	92	1045	1045
Q.A3 Sorts of rewards	Reedem/ exchange points for cash NFI	127	37	28	42	21	127	127
		12.2%	14.3%	10.8%	9.5%	22.8%	12.2%	12.2%
	Reedem/ exchange points to purchase meals/drinks/services in venue	409	54	135	220	0	409	409
		39.2%	20.7%	53.0%	50.3%	0.0%	39.2%	39.2%
	Redeem/ exchange points for prizes/ gifts showcase	116	42	14	61	0	116	116
		11.1%	16.0%	5.5%	13.9%	0.0%	11.1%	11.1%
	Redeem/ exchange points for external gift vouchers i.e. fuel card, Coles Myer etc	30	4	0	26	0	30	30
		2.9%	1.5%	0.0%	6.0%	0.0%	2.9%	2.9%
	Gaming vouchers/ credit	250	20	112	65	53	250	250
		23.9%	7.8%	43.9%	14.9%	57.4%	23.9%	23.9%
	Meals/ drinks discounts or vouchers	184	64	40	28	52	184	184
		17.6%	24.7%	15.8%	6.4%	56.2%	17.6%	17.6%
	Birthday promotions/ vouchers	67	42	5	17	5	67	67
		6.4%	16.0%	1.8%	3.8%	4.9%	6.4%	6.4%
	Vouchers NFI/ venue credit NFI	102	16	0	86	0	102	102
		9.8%	6.1%	0.0%	19.7%	0.0%	9.8%	9.8%
	Entry into/ chance to win prize draws or jackpots	284	178	37	15	53	284	284
		27.2%	68.5%	14.6%	3.5%	58.3%	27.2%	27.2%
	Free meals or drinks	64	32	2	5	25	64	64
		6.1%	12.3%	0.9%	1.0%	27.2%	6.1%	6.1%
	Free or discounted parking	3	2	0	1	0	3	3
		0.3%	0.8%	0.0%	0.2%	0.0%	0.3%	0.3%
	Other	9	1	0	4	4	9	9
		0.9%	0.4%	0.0%	1.0%	4.6%	0.9%	0.9%
TOTAL		1045	260	255	438	92	1045	1045
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.A3 What sorts of rewards can you get?

BASE AUDITED BY PHONE		Total	VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
			Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	99	1	7	35	56	1	7	35	44	12
	Wtd Popn	1045	14	36	357	638	14	36	357	626	12
Q A3 Sorts of rewards	Reedem/ exchange points for cash NFI	127	0	0	110	18	0	0	110	15	3
		12 2%	0 0%	0 0%	30 7%	2 8%	0 0%	0 0%	30 7%	2 4%	25 0%
	Reedem/ exchange points to purchase meals/drinks/services in venue	409	0	0	126	283	0	0	126	275	8
		39 2%	0 0%	0 0%	35 2%	44 4%	0 0%	0 0%	35 2%	44 0%	66 7%
	Redeem/ exchange points for prizes/ gifts showcase	116	0	0	48	68	0	0	48	68	0
		11 1%	0 0%	0 0%	13 5%	10 7%	0 0%	0 0%	13 5%	10 9%	0 0%
	Redeem/ exchange points for external gift vouchers i e fuel card, Coles Myer etc	30	0	0	0	30	0	0	0	26	4
		2 9%	0 0%	0 0%	0 0%	4 8%	0 0%	0 0%	0 0%	4 2%	33 3%
	Gaming vouchers/ credit	250	0	18	120	113	0	18	120	111	2
		23 9%	0 0%	49 0%	33 6%	17 6%	0 0%	49 0%	33 6%	17 7%	16 7%
	Meals/ drinks discounts or vouchers	184	14	0	69	101	14	0	69	96	5
		17 6%	100 0%	0 0%	19 4%	15 8%	100 0%	0 0%	19 4%	15 3%	41 7%
	Birthday promotions/ vouchers	67	0	5	21	42	0	5	21	42	0
		6 4%	0 0%	12 6%	5 9%	6 5%	0 0%	12 6%	5 9%	6 7%	0 0%
	Vouchers NFI/ venue credit NFI	102	0	0	0	102	0	0	0	100	2
		9 8%	0 0%	0 0%	0 0%	16 0%	0 0%	0 0%	0 0%	16 0%	16 7%
	Entry into/ chance to win prize draws or jackpots	284	14	18	87	165	14	18	87	163	2
		27 2%	100 0%	51 0%	24 3%	25 9%	100 0%	51 0%	24 3%	26 1%	16 7%
	Free meals or drinks	64	14	0	29	20	14	0	29	18	2
		6 1%	100 0%	0 0%	8 2%	3 2%	100 0%	0 0%	8 2%	2 9%	16 7%
	Free or discounted parking	3	0	0	0	3	0	0	0	0	3
		0 3%	0 0%	0 0%	0 0%	0 5%	0 0%	0 0%	0 0%	0 0%	25 0%
	Other	9	0	0	0	9	0	0	0	8	1
		0 9%	0 0%	0 0%	0 0%	1 5%	0 0%	0 0%	0 0%	1 3%	8 3%
TOTAL		1045	14	36	357	638	14	36	357	626	12
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A4 How do you join up?

BASE AUDITED BY PHONE		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	99	38	49	12	49	50	8	14	25	14	20	13	4	1
	Wtd Popn	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
Q A4 How you join up	Online - fill out/ download form	344	38	299	7	119	225	13	159	168	1	0	0	3	1
		32 9%	8 8%	49 8%	58 3%	22 9%	42 8%	37 5%	44 0%	51 1%	0 8%	0 0%	0 0%	50 0%	100 0%
	At venue - fill out form/ present ID	763	362	391	10	398	365	29	307	162	59	76	122	6	1
		73 0%	83 5%	65 3%	83 3%	76 7%	69 5%	87 5%	85 3%	49 5%	50 1%	100 0%	100 0%	100 0%	100 0%
	It's already part of the venue/ club membership	184	52	132	0	91	93	0	106	19	59	0	0	0	0
		17 6%	12 1%	22 0%	0 0%	17 5%	17 7%	0 0%	29 4%	5 8%	49 9%	0 0%	0 0%	0 0%	0 0%
	Purchase membership	84	0	84	0	28	56	0	0	84	0	0	0	0	0
		8 0%	0 0%	13 9%	0 0%	5 4%	10 6%	0 0%	0 0%	25 5%	0 0%	0 0%	0 0%	0 0%	0 0%
	Other	33	19	14	0	0	33	0	0	33	0	0	0	0	0
		3 2%	4 4%	2 3%	0 0%	0 0%	6 3%	0 0%	0 0%	10 1%	0 0%	0 0%	0 0%	0 0%	0 0%
TOTAL		1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A4 How do you join up?

BASE: AUDITED BY PHONE		Total	VENUE WEBSITE INFO				LP (CONFIRMED)	VENUE DETAILS
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	Loyalty
Sample Size	Sample Size	99	31	23	33	12	99	99
	Wtd Popn	1045	260	255	438	92	1045	1045
Q.A4 How you join up	Online - fill out/ download form	344	138	69	114	23	344	344
		32.9%	52.8%	27.0%	26.1%	25.5%	32.9%	32.9%
	At venue - fill out form/ present ID	763	129	161	417	57	763	763
		73.0%	49.5%	62.9%	95.3%	62.0%	73.0%	73.0%
	It's already part of the venue/ club membership	184	13	81	69	21	184	184
		17.6%	5.0%	31.6%	15.9%	22.8%	17.6%	17.6%
	Purchase membership	84	56	28	0	0	84	84
		8.0%	21.4%	10.9%	0.0%	0.0%	8.0%	8.0%
	Other	33	19	0	0	14	33	33
		3.2%	7.4%	0.0%	0.0%	15.2%	3.2%	3.2%
TOTAL		1045	260	255	438	92	1045	1045
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.A4 How do you join up?

BASE AUDITED BY PHONE		Total	VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
			Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	99	1	7	35	56	1	7	35	44	12
	Wtd Popn	1045	14	36	357	638	14	36	357	626	12
Q A4 How you join up	Online fill out/ download form	344	0	14	33	297	0	14	33	290	7
		32 9%	0 0%	39 0%	9 3%	46 5%	0 0%	39 0%	9 3%	46 3%	58 3%
	At venue fill out form/ present ID	763	0	36	251	477	0	36	251	467	10
		73 0%	0 0%	100 0%	70 3%	74 7%	0 0%	100 0%	70 3%	74 5%	83 3%
	It's already part of the venue/ club membership	184	0	0	78	106	0	0	78	106	0
		17 6%	0 0%	0 0%	21 9%	16 6%	0 0%	0 0%	21 9%	16 9%	0 0%
	Purchase membership	84	0	0	28	56	0	0	28	56	0
		8 0%	0 0%	0 0%	7 8%	8 7%	0 0%	0 0%	7 8%	8 9%	0 0%
	Other	33	14	0	0	19	14	0	0	19	0
		3 2%	100 0%	0 0%	0 0%	3 0%	100 0%	0 0%	0 0%	3 1%	0 0%
TOTAL		1045	14	36	357	638	14	36	357	626	12
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A5 Do they have other offers for people who play pokies?

			VENUE TYPE			REGION		STATE							
BASE: AUDITED BY PHONE		Total	Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	99	38	49	12	49	50	8	14	25	14	20	13	4	1
	Wtd Popn	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
Q A5 Other offers	Yes - prize draws/ jackpots	56	44	13	0	28	28	8	0	19	4	5	20	0	0
		5 4%	10 1%	2 1%	0 0%	5 5%	5 3%	25 0%	0 0%	5 8%	3 6%	6 0%	16 3%	0 0%	0 0%
	Yes - random/ spot prizes	37	14	22	0	28	9	4	0	14	4	5	10	0	0
		3 5%	3 3%	3 7%	0 0%	5 4%	1 7%	12 5%	0 0%	4 2%	3 6%	6 0%	8 2%	0 0%	0 0%
	Yes - free meals/ drinks	18	14	4	0	9	9	0	0	0	4	14	0	0	0
		1 7%	3 1%	0 7%	0 0%	1 7%	1 7%	0 0%	0 0%	0 0%	3 6%	17 9%	0 0%	0 0%	0 0%
	Yes - bonus points	18	17	0	1	18	0	0	0	0	17	0	0	1	0
		1 7%	3 8%	0 0%	8 3%	3 4%	0 0%	0 0%	0 0%	0 0%	14 0%	0 0%	0 0%	15 6%	0 0%
	Yes - other/ NFI	14	0	14	0	0	14	0	0	14	0	0	0	0	0
		1 3%	0 0%	2 3%	0 0%	0 0%	2 7%	0 0%	0 0%	4 2%	0 0%	0 0%	0 0%	0 0%	0 0%
	No	862	344	509	9	402	460	21	360	239	93	62	81	4	1
		82 5%	79 4%	84 8%	75 0%	77 4%	87 6%	62 5%	100 0%	72 9%	78 7%	82 1%	66 5%	68 8%	100 0%
	Not sure/ specified	54	10	42	2	39	15	0	0	42	0	0	11	1	0
		5 1%	2 3%	7 0%	16 7%	7 5%	2 8%	0 0%	0 0%	12 7%	0 0%	0 0%	9 0%	15 6%	0 0%
TOTAL		1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A5 Do they have other offers for people who play pokies?

			VENUE WEBSITE INFO				LP (CONFIRMED)	VENUE DETAILS
BASE AUDITED BY PHONE		Total	LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	Loyalty
Sample Size	Sample Size	99	31	23	33	12	99	99
	Wtd Popn	1045	260	255	438	92	1045	1045
Q.A5 Other offers	Yes - prize draws/ jackpots	56	19	9	28	0	56	56
		5.4%	7.4%	3.5%	6.5%	0.0%	5.4%	5.4%
	Yes - random/ spot prizes	37	14	9	14	0	37	37
		3.5%	5.3%	3.5%	3.2%	0.0%	3.5%	3.5%
	Yes - free meals/ drinks	18	4	9	0	5	18	18
		1.7%	1.7%	3.5%	0.0%	4.9%	1.7%	1.7%
	Yes - bonus points	18	1	0	17	0	18	18
		1.7%	0.4%	0.0%	3.8%	0.0%	1.7%	1.7%
	Yes - other/ NFI	14	14	0	0	0	14	14
		1.3%	5.3%	0.0%	0.0%	0.0%	1.3%	1.3%
	No	862	164	242	369	87	862	862
		82.5%	63.1%	94.8%	84.2%	95.1%	82.5%	82.5%
	Not sure/ specified	54	44	0	10	0	54	54
		5.1%	16.8%	0.0%	2.3%	0.0%	5.1%	5.1%
TOTAL		1045	260	255	438	92	1045	1045
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A5 Do they have other offers for people who play pokies?

BASE AUDITED BY PHONE		Total	VENUE SIZE (NO EGMs)				VENUE SIZE (NO EGMs) DETAILED				
			Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	99	1	7	35	56	1	7	35	44	12
	Wtd Popn	1045	14	36	357	638	14	36	357	626	12
Q A5 Other offers	Yes prize draws/ jackpots	56	0	0	13	43	0	0	13	43	0
		5 4%	0 0%	0 0%	3 6%	6 8%	0 0%	0 0%	3 6%	6 9%	0 0%
	Yes random/ spot prizes	37	0	0	9	28	0	0	9	28	0
		3 5%	0 0%	0 0%	2 5%	4 4%	0 0%	0 0%	2 5%	4 5%	0 0%
	Yes free meals/ drinks	18	0	0	18	0	0	0	18	0	0
		1 7%	0 0%	0 0%	5 0%	0 0%	0 0%	0 0%	5 0%	0 0%	0 0%
	Yes bonus points	18	0	0	17	1	0	0	17	0	1
		1 7%	0 0%	0 0%	4 6%	0 2%	0 0%	0 0%	4 6%	0 0%	8 3%
	Yes other/ NFI	14	0	0	14	0	0	0	14	0	0
		1 3%	0 0%	0 0%	3 9%	0 0%	0 0%	0 0%	3 9%	0 0%	0 0%
	No	862	14	36	300	512	14	36	300	503	9
		82 5%	100 0%	100 0%	84 1%	80 2%	100 0%	100 0%	84 1%	80 3%	75 0%
	Not sure/ specified	54	0	0	0	54	0	0	0	52	2
		5 1%	0 0%	0 0%	0 0%	8 4%	0 0%	0 0%	0 0%	8 3%	16 7%
TOTAL		1045	14	36	357	638	14	36	357	626	12
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A6 Do they send out newsletters or other communications?

BASE AUDITED BY PHONE		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	99	38	49	12	49	50	8	14	25	14	20	13	4	1
	Wtd Popn	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
CODED - Audit Q5 - Do they send out newsletters or other communications?	Yes - via website/ website updates	243	62	177	4	123	120	4	132	86	14	5	0	1	1
		23 3%	14 3%	29 6%	33 3%	23 7%	22 8%	12 5%	36 7%	26 3%	11 8%	6 0%	0 0%	15 6%	100 0%
	Yes - other	2	0	2	0	0	2	0	0	0	0	2	0	0	0
		0 2%	0 0%	0 3%	0 0%	0 0%	0 4%	0 0%	0 0%	0 0%	0 0%	2 6%	0 0%	0 0%	0 0%
	Yes - NFI	87	17	66	4	33	53	0	1	56	17	2	12	0	0
		8 3%	3 8%	11 1%	33 3%	6 4%	10 2%	0 0%	0 3%	17 0%	14 0%	2 6%	9 6%	0 0%	0 0%
	No	708	355	350	4	363	346	25	227	186	88	67	110	5	0
		67 8%	81 9%	58 3%	33 3%	69 9%	65 8%	75 0%	63 0%	56 7%	74 2%	88 7%	90 4%	84 4%	0 0%
	Not sure/ specified	4	0	4	0	0	4	4	0	0	0	0	0	0	0
		0 4%	0 0%	0 7%	0 0%	0 0%	0 8%	12 5%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
TOTAL		1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A6 Do they send out newsletters or other communications?

BASE: AUDITED BY PHONE		Total	VENUE WEBSITE INFO				LP (CONFIRMED)	VENUE DETAILS
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	Loyalty
Sample Size	Sample Size	99	31	23	33	12	99	99
	Wtd Popn	1045	260	255	438	92	1045	1045
CODED - Audit Q5 - Do they send out newsletters or other communications?	Yes - via website/ website updates	243	79	111	53	0	243	243
		23 3%	30 3%	43 7%	12 1%	0 0%	23 3%	23 3%
	Yes - other	2	0	0	0	2	2	2
		0 2%	0 0%	0 0%	0 0%	2 2%	0 2%	0 2%
	Yes - NFI	87	45	0	28	14	87	87
		8 3%	17 2%	0 0%	6 4%	15 2%	8 3%	8 3%
	No	708	137	144	357	71	708	708
		67 8%	52 6%	56 3%	81 5%	78 0%	67 8%	67 8%
	Not sure/ specified	4	0	0	0	4	4	4
		0 4%	0 0%	0 0%	0 0%	4 6%	0 4%	0 4%
TOTAL		1045	260	255	438	92	1045	1045
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A6 Do they send out newsletters or other communications?

BASE: AUDITED BY PHONE		Total	VENUE SIZE (NO. EGMs)				VENUE SIZE (NO. EGMs) DETAILED				
			Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	99	1	7	35	56	1	7	35	44	12
	Wtd Popn	1045	14	36	357	638	14	36	357	626	12
CODED Audit Q5 Do they send out newsletters or other communications?	Yes via website/ website updates	243	0	0	56	187	0	0	56	183	4
		23.3%	0.0%	0.0%	15.6%	29.4%	0.0%	0.0%	15.6%	29.3%	33.3%
	Yes other	2	0	2	0	0	0	2	0	0	0
		0.2%	0.0%	5.6%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%
	Yes NFI	87	14	14	17	42	14	14	17	38	4
		8.3%	100.0%	39.0%	4.6%	6.7%	100.0%	39.0%	4.6%	6.1%	33.3%
	No	708	0	20	284	404	0	20	284	400	4
		67.8%	0.0%	55.4%	79.7%	63.3%	0.0%	55.4%	79.7%	63.9%	33.3%
	Not sure/ specified	4	0	0	0	4	0	0	0	4	0
		0.4%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.7%	0.0%
TOTAL		1045	14	36	357	638	14	36	357	626	12
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.A7 Can they send information by email?

BASE: AUDITED BY PHONE		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	99	38	49	12	49	50	8	14	25	14	20	13	4	1
	Wtd Popn	1045	433	599	12	519	525	34	360	328	118	76	122	6	1
CODED - Audit Q7 - Can they send information to you by email?	Yes	162	74	84	3	95	67	4	34	89	17	7	11	0	1
		15.5%	17.2%	14.1%	25.0%	18.2%	12.8%	12.5%	9.5%	27.1%	14.0%	8.6%	8.7%	0.0%	100.0%
	No	812	359	445	8	411	401	29	326	168	102	69	111	6	0
		77.7%	82.8%	74.3%	66.7%	79.1%	76.4%	87.5%	90.5%	51.4%	86.0%	91.4%	91.3%	100.0%	0.0%
	Not sure/ specified	71	0	70	1	14	57	0	0	71	0	0	0	0	0
		6.8%	0.0%	11.6%	8.3%	2.7%	10.8%	0.0%	0.0%	21.5%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL		1045	433	599	12	519	525	34	360	328	118	76	122	6	1
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.A7 Can they send information by email?

BASE: AUDITED BY PHONE		Total	VENUE WEBSITE INFO				LP (CONFIRMED)	VENUE DETAILS
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	Loyalty
Sample Size	Sample Size	99	31	23	33	12	99	99
	Wtd Popn	1045	260	255	438	92	1045	1045
CODED - Audit Q7 - Can they send information to you by email?	Yes	162	96	4	61	0	162	162
		15.5%	37.0%	1.6%	14.0%	0.0%	15.5%	15.5%
	No	812	121	237	376	78	812	812
		77.7%	46.6%	92.9%	86.0%	84.8%	77.7%	77.7%
	Not sure/ specified	71	43	14	0	14	71	71
		6.8%	16.4%	5.5%	0.0%	15.2%	6.8%	6.8%
TOTAL		1045	260	255	438	92	1045	1045
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q.A7 Can they send information by email?

BASE: AUDITED BY PHONE		Total	VENUE SIZE (NO. EGMs)				VENUE SIZE (NO. EGMs) DETAILED				
			Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	99	1	7	35	56	1	7	35	44	12
	Wtd Popn	1045	14	36	357	638	14	36	357	626	12
CODED Audit Q7 Can they send information to you by email?	Yes	162	0	0	69	93	0	0	69	90	3
		15.5%	0.0%	0.0%	19.4%	14.5%	0.0%	0.0%	19.4%	14.3%	25.0%
	No	812	14	36	288	475	14	36	288	467	8
		77.7%	100.0%	100.0%	80.6%	74.4%	100.0%	100.0%	80.6%	74.6%	66.7%
	Not sure/ specified	71	0	0	0	71	0	0	0	70	1
		6.8%	0.0%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	11.1%	8.3%
TOTAL		1045	14	36	357	638	14	36	357	626	12
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A8 Any other information?

BASE: AUDITED BY PHONE		Total	VENUE TYPE			REGION		STATE							
			Hotel	Club	Casino	Metro	Non metro	ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
Q A8 Other info	Points expiry date	3	0	0	3	1	2	0	0	3	0	0	0	0	0
		0 1%	0 0%	0 0%	23 1%	0 0%	0 1%	0 0%	0 0%	0 2%	0 0%	0 0%	0 0%	0 0%	0 0%
	Rewards/ prizes offered for playing pokies (not part of a program)	145	77	68	0	52	93	0	26	118	0	0	0	0	0
		2 5%	2 3%	2 9%	0 0%	2 5%	2 6%	0 0%	0 9%	8 9%	0 0%	0 0%	0 0%	0 0%	0 0%
	Plans to implemement loyalty program/ rewards system etc	60	57	2	0	41	19	0	0	57	0	0	0	2	0
		1 0%	1 7%	0 1%	0 0%	2 0%	0 5%	0 0%	0 0%	4 3%	0 0%	0 0%	0 0%	3 0%	0 0%
	Only venue/ club membership (unrelated to pokies)	559	123	436	0	188	371	0	174	219	17	0	149	0	0
		9 8%	3 7%	18 8%	0 0%	9 1%	10 2%	0 0%	5 7%	16 5%	2 9%	0 0%	28 9%	0 0%	0 0%
	No loyalty program/ rewards system etc	3885	2362	1523	0	1269	2616	25	2328	813	332	20	332	35	0
		68 2%	70 2%	65 7%	0 0%	61 4%	72 1%	33 2%	76 7%	61 3%	58 6%	19 6%	64 4%	47 6%	0 0%
	No pokies at venue	190	117	72	1	114	76	17	155	0	4	0	11	3	0
		3 3%	3 5%	3 1%	7 7%	5 5%	2 1%	22 6%	5 1%	0 0%	0 8%	0 0%	2 1%	3 5%	0 0%
	Only a few EGMs at venue	433	263	170	0	94	338	4	106	286	37	0	0	0	0
		7 6%	7 8%	7 3%	0 0%	4 6%	9 3%	5 5%	3 5%	21 5%	6 6%	0 0%	0 0%	0 0%	0 0%
	Other	207	127	79	0	85	122	0	87	91	17	2	11	0	0
		3 6%	3 8%	3 4%	0 0%	4 1%	3 4%	0 0%	2 9%	6 8%	2 9%	2 0%	2 1%	0 0%	0 0%
	No other info	1255	644	601	9	580	675	34	436	325	193	80	152	34	1
		22 0%	19 2%	25 9%	69 2%	28 1%	18 6%	44 2%	14 4%	24 5%	34 1%	78 4%	29 4%	45 9%	100 0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.A8 Any other information?

BASE AUDITED BY PHONE		Total	VENUE WEBSITE INFO				LP (CONFIRMED)		VENUE DETAILS			
			LP & pokies evident	Pokies only evident	Neither evident	No website	Yes	No	Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
Q A8 Other info	Points expiry date	3	3	0	0	0	3	0	3	0	0	0
		0 1%	1 1%	0 0%	0 0%	0 0%	0 3%	0 0%	0 3%	0 0%	0 0%	0 0%
	Rewards/ prizes offered for playing pokies (not part of a program)	145	14	91	0	40	0	145	0	40	104	0
		2 5%	5 1%	9 4%	0 0%	1 7%	0 0%	3 1%	0 0%	7 4%	2 7%	0 0%
	Plans to implemement loyalty program/ rewards system etc	60	0	21	19	19	0	60	0	19	41	0
		1 0%	0 0%	2 2%	0 9%	0 8%	0 0%	1 3%	0 0%	3 5%	1 0%	0 0%
	Only venue/ club membership (unrelated to pokies)	559	14	171	206	169	0	559	0	545	14	0
		9 8%	5 1%	17 8%	9 7%	7 2%	0 0%	12 0%	0 0%	100 0%	0 4%	0 0%
	No loyalty program/ rewards system etc	3885	14	553	1478	1841	0	3885	0	534	3351	0
		68 2%	5 1%	57 5%	70 1%	78 3%	0 0%	83 5%	0 0%	98 0%	85 6%	0 0%
	No pokies at venue	190	0	26	47	117	0	190	0	0	0	190
		3 3%	0 0%	2 7%	2 2%	5 0%	0 0%	4 1%	0 0%	0 0%	0 0%	100 0%
	Only a few EGMs at venue	433	0	95	142	196	0	433	0	14	419	0
		7 6%	0 0%	9 9%	6 8%	8 3%	0 0%	9 3%	0 0%	2 6%	10 7%	0 0%
	Other	207	14	100	11	82	81	126	81	0	126	0
		3 6%	5 1%	10 4%	0 5%	3 5%	7 7%	2 7%	7 7%	0 0%	3 2%	0 0%
	No other info	1255	243	238	535	239	961	294	961	0	294	0
		22 0%	88 8%	24 7%	25 4%	10 2%	92 0%	6 3%	92 0%	0 0%	7 5%	0 0%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - VENUE AUDITS (REF: 2730) - WEIGHTED TABLES

Q.A8 Any other information?

BASE AUDITED BY PHONE		Total	VENUE SIZE (NO EGMs) Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	VENUE SIZE (NO EGMs) DETAILED Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
Q A8 Other info	Points expiry date	3	0	0	0	3	0	0	0	0	3
		0 1%	0 0%	0 0%	0 0%	0 3%	0 0%	0 0%	0 0%	0 0%	23 1%
	Rewards/ prizes offered for playing pokies (not part of a program)	145	33	46	52	14	33	46	52	14	0
		2 5%	1 8%	3 5%	3 3%	1 3%	1 8%	3 5%	3 3%	1 4%	0 0%
	Plans to implemement loyalty program/ rewards system etc	60	0	0	57	2	0	0	57	2	0
		1 0%	0 0%	0 0%	3 7%	0 2%	0 0%	0 0%	3 7%	0 2%	0 0%
	Only venue/ club membership (unrelated to pokies)	559	96	142	206	115	96	142	206	115	0
		9 8%	5 4%	10 9%	13 1%	11 1%	5 4%	10 9%	13 1%	11 2%	0 0%
	No loyalty program/ rewards system etc	3885	1286	1170	1057	372	1286	1170	1057	372	0
		68 2%	71 8%	90 3%	67 2%	35 9%	71 8%	90 3%	67 2%	36 3%	0 0%
	No pokies at venue	190	181	4	4	1	181	4	4	0	1
		3 3%	10 1%	0 3%	0 3%	0 1%	10 1%	0 3%	0 3%	0 0%	7 7%
	Only a few EGMs at venue	433	231	129	73	0	231	129	73	0	0
		7 6%	12 9%	9 9%	4 7%	0 0%	12 9%	9 9%	4 7%	0 0%	0 0%
	Other	207	53	0	102	51	53	0	102	51	0
		3 6%	3 0%	0 0%	6 5%	4 9%	3 0%	0 0%	6 5%	5 0%	0 0%
	No other info	1255	177	91	379	607	177	91	379	598	9
		22 0%	9 9%	7 0%	24 1%	58 6%	9 9%	7 0%	24 1%	58 5%	69 2%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.13 Is the venue sending an email?

BASE: ALL VENUES		Total	VENUE TYPE Hotel	Club	Casino	REGION Metro	Non metro	STATE ACT	NSW	QLD	SA	TAS	VIC	NT	WA
Sample Size	Sample Size	367	188	166	13	152	215	24	101	84	47	27	51	32	1
	Wtd Popn	5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
Q 15 Is the venue sending an email?	Yes	147	113	32	2	104	43	4	34	85	17	7	0	0	0
		2 6%	3 4%	1 4%	15 4%	5 0%	1 2%	5 5%	1 1%	6 4%	2 9%	6 4%	0 0%	0 0%	0 0%
	No	5549	3250	2288	11	1962	3587	72	2999	1242	550	96	516	74	1
		97 4%	96 6%	98 6%	84 6%	95 0%	98 8%	94 5%	98 9%	93 6%	97 1%	93 6%	100 0%	100 0%	100 0%
TOTAL		5696	3363	2320	13	2066	3630	76	3033	1327	567	102	516	74	1
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.13 Is the venue sending an email?

BASE: ALL VENUES		Total	VENUE WEBSITE INFO LP & pokies evident	Pokies only evident	Neither evident	No website	LP (CONFIRMED) Yes	No	VENUE DETAILS Loyalty	Club/ Membership	No programs	No pokies
Sample Size	Sample Size	367	32	71	139	125	99	268	99	35	215	18
	Wtd Popn	5696	274	962	2109	2351	1045	4651	1045	545	3916	190
Q 15 Is the venue sending an email?	Yes	147	34	23	89	0	89	57	89	0	57	0
		2 6%	12 5%	2 4%	4 2%	0 0%	8 5%	1 2%	8 5%	0 0%	1 5%	0 0%
	No	5549	240	939	2020	2351	955	4594	955	545	3859	190
		97 4%	87 5%	97 6%	95 8%	100 0%	91 5%	98 8%	91 5%	100 0%	98 5%	100 0%
TOTAL		5696	274	962	2109	2351	1045	4651	1045	545	3916	190
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Q.13 Is the venue sending an email?

BASE ALL VENUES		Total	VENUE SIZE (NO EGMs) Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	VENUE SIZE (NO EGMs) DETAILED Very small (up to 10 EGMs)	Small (11 to 20 EGMs)	Medium (21 to 40 EGMs)	Large (>40 EGMs)	Casinos
Sample Size	Sample Size	367	102	75	101	89	102	75	101	76	13
	Wtd Popn	5696	1791	1297	1572	1036	1791	1297	1572	1023	13
Q 15 Is the venue sending an email?	Yes	147	19	0	107	20	19	0	107	18	2
		2 6%	1 1%	0 0%	6 8%	1 9%	1 1%	0 0%	6 8%	1 8%	15 4%
	No	5549	1772	1297	1465	1016	1772	1297	1465	1005	11
		97 4%	98 9%	100 0%	93 2%	98 1%	98 9%	100 0%	93 2%	98 2%	84 6%
TOTAL		5696	1791	1297	1572	1036	1791	1297	1572	1023	13
		100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%	100 0%

Appendix 3: Relevant Legislation

LIST OF RELEVANT LEGISLATION/ GUIDELINES BY STATE

STATE	LEGISLATION
ACT	*Gambling and Racing Control (Code of Practice) Regulation 2002 (SL2002-28) made under the Gambling and Racing Control Act 1999 (Republished: 2 February 2009)* Refer Part 1.4 – Advertising, Promotions and Inducements Source: ACT Gambling and Racing Commission Website: http://www.gamblingandracing.act.gov.au/Legislation.htm *Gaming Machines Act 2004 (Republished: 1 February 2014)* Refer Part 10 – Promoting Responsible Practices at Licensed Premises Source: ACT Gambling and Racing Commission Website: http://www.gamblingandracing.act.gov.au/Legislation.htm
NSW	*NSW Casino Control Regulation 2009* Refer Part 4 – Responsible Gambling Practices; Division 1: Junkets & Inducements, Section 20 – Gambling Inducements. Source: NSW Government – NSW Legislation website: http://www.legislation.nsw.gov.au/sessionalview/sessional/sr/2009-425.pdf See also: *Casino Control Act 1992* Refer Part 5 – Casino Operations, section 70A – Advertising in relation to gaming machines Source: NSW Government – NSW Legislation website: http://www.legislation.nsw.gov.au/maintop/view/inforce/act+15+1992+cd+0+N *See also: Gaming Machines Regulation 2010 under the Gaming Machines Act 2001* Refer Part 3 - Responsible gambling practices and other harm minimisation measures; Division 4 - Miscellaneous harm minimisation measures Source: NSW Government – NSW Legislation website: http://www.legislation.nsw.gov.au/maintop/view/inforce/subordleg+476+2010+cd+0+N
NT	*Northern Territory Gaming Machine Regulation 2013 (under the Gaming Machine Act)* Refer Part 8: General – Advertising Source: Northern Territory Government of Business website http://www.dob.nt.gov.au/gambling-licensing/gambling/Pages/default.aspx *Northern Territory Code of Practice for Responsible Gambling* Refer Section 8 - Advertising and Promotions Source: Northern Territory Government of Business website http://www.dob.nt.gov.au/gambling-licensing/gambling/Pages/default.aspx
QLD	1. *QLD Responsible Gambling Resource Manual Hotels – Section A Version 3- 2013* 2. *QLD Responsible Gambling Resource Manual Clubs – Section B Version 3 - 2013* 3. *QLD Responsible Gambling Resource Manual Casinos – Section C Version 3 - 2013* Refer Part 6 – Advertising and Promotions Source: QLD Govt Office of Liquor and Gaming website: http://www.olgr.qld.gov.au/gaming/responsible/information/code-of-practice/index.shtml *Queensland Responsible Gambling Code of Practice – Sept 2012 V4* Refer Part 6 - Advertising and Promotions under Practices Section Source: QLD Govt Office of Liquor and Gaming website: http://www.olgr.qld.gov.au/resources/responsibleGamblingDocuments/responsibleGamblingCodeOfPractice.pdf *Queensland Gaming Machines Act 1991 – Current as of 1 January V4* Refer Part 6 - Supervision and Management of Gaming Source: QLD Govt Office of Liquor and Gaming website: https://www.legislation.qld.gov.au/LEGISLTN/CURRENT/G/GamingMachA91.pdf

STATE	LEGISLATION
SA	*SA Gambling Codes of Practice Notice 2013* Refer Chapter 2, Part 2 – Contents of Gambling Advertising; Chapter 3, Parts 2 & 3 on inducements and loyalty Source: SA Independent Gambling Authority Website: http://www.iga.sa.gov.au/pdf/GR-2013-08-dist.pdf http://www.cbs.sa.gov.au/wcm/licensing-and-registration/liquor-and-gambling/
TAS	*Responsible Gambling Mandatory Code of Practice for Tasmania – Version 1.2, May 2013* Refer Sections 2 & 3 on Inducements and Player Loyalty Programs Source: Tasmanian Gaming Commission Website: http://www.treasury.tas.gov.au/domino/dtf/dtf.nsf/v-liq-and-gaming/5CCEAA61FC7DB164CA2578880019C076 *Gaming Control Act 1993 – Current 20 June 2013* Refer Part 5 – Control of Gaming Source: Tasmanian Gaming Commission Website: http://www.thelaw.tas.gov.au/tocview/index.w3p;cond=;doc_id=94%2B%2B1993%2BAT%40EN%2B20140410000000;histon=;prompt=;rec=;term= There are also a set of new rules relating to gambling inducements and loyalty program (effective from Sept 1 2012) under section 91 of the Gaming Control Act 1993. There are documents detailing these rules for casinos, gaming operators, licensed premises etc. which are covered by the Mandatory Code of Practice document. Source: Tasmanian Gaming Commission Website: http://www.treasury.tas.gov.au/domino/dtf/dtf.nsf/6044ee0c1cf958a2ca256f2500108bba/c45e545398001dd3ca25735900826336?OpenDocument
VIC	*1. VIC Gambling Regulation Act 2003 – Version 55, 1 July 2013.* Refer: Part 5 Control of Gaming – Inducements, Advertising, Loyalty Schemes. *2. VIC Gambling Regulation Regulations 2005, Version 7, 16 August 2012* Refer: Division 3 Printed Info; Division 7: Loyalty Schemes Source: Victorian Commission for Gambling and Liquor Regulation Website *3. Gambling Regulations 2015, 16 June 2015* Refer: Division 3 Player Information Standards and Printed Information; Division 5: Loyalty Schemes Source: Victorian Legislation and Parliamentary Documents http://www.legislation.vic.gov.au/Domino/Web_Notes/LDMS/PubStatbook.nsf/b05145073fa2a882ca256da4001bc4e7/A7D6EAE7FBE047A2CA257E6600142178/$FILE/15-055sra%20authorised.pdf *Ministerial Direction for Gambling Codes of Conduct – 30 Sept 2008* These are guidelines for businesses to help them to put together a code of conduct. Just mentions that a code of conduct must cover a loyalty scheme Source: Victorian Commission for Gambling and Liquor Regulation Website http://assets.justice.vic.gov.au/vcglr/resources/198fb5bc-7192-4e8d-9ae4-6d670321918f/ministerial_direction_respgamblingcodeconduct.pdf
WA	*Gaming and Wagering Commission Act 1987 – 16 Dec 2011* Refer Part V – Permitted Gambling – 63. Source: WA Govt Dept of Racing, Gaming and Liquor http://www.rgl.wa.gov.au/Default.aspx?NodeId=192 *Crown Perth (casino) Code of Practice* Refer Section 9 – Advertising and Promotions (9.3 Complimentaries Policy) Source: Crown Perth Website: http://www.crownperth.com.au/responsible-service-of-gambling/about-responsible-service-of-gambling

Also refer to the following website for a list of relevant legislation documents:

https://www.austgamingcouncil.org.au/Codes-of-Conduct

SUMMARY OF RELEVANT LEGISLATION/GUIDELINES BY STATE

ACT

Advertising

- It is an offence to display an external sign advertising gaming machines or promoting a gambling activity on the licensed premises (excludes TV ads or on the internet).[1]
- Gambling advertising in relation to a gambling venue must contain or be published near the name and phone number of an approved gambling counselling service in ACT.[2]
- Any promotional material at the venue relating to gambling at the venue must contain rules and conditions of promotion or state where they can be inspected, AND the venue operator must make the rules and conditions of a promotion available for inspection at the venue.[3]

Promotions, Inducements & Player Rewards

- Licensees of a gambling facility cannot conduct promotions that require or encourage people to gamble at the venue for a:[4]
    - minimum period of time to qualify for rewards; or
    - minimum amount to qualify for rewards (*exception: player reward schemes- as long as the reward scheme is advertised only within the venue or directly to venue members*).
- Licensees of a gambling facility cannot conduct promotions for gambling or including gambling that include an offer of free or discounted alcohol.[5]
- Gaming machine licensees cannot offer a promotion that encourages people to increase the frequency of or amount of money spent on gambling.[6]
- Gaming machine licensees cannot encourage people to gamble by offering:[7]
    - free or discounted alcohol
    - cash, or free or discounted gambling credits (unless the offer for these is made to all patrons on the facility all of the time as part of the facilities usual or regular price schedule).

Credit

- It is an offence to extend or offer to extend credit to a person to allow the person to play a gaming machine on the licensed premises. [8]

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[1] ACT Gaming Machines Act 2004 – Part 10, Clause 152-1, p136
[2] ACT Gambling and Racing Control (Code of Practice) Regulation 2002 – Part 1.4, section 1.29-2, p35
[3] ACT Gambling and Racing Control (Code of Practice) Regulation 2002 – Part 1.4, section 1.30-5,6 p37
[4] ACT Gambling and Racing Control (Code of Practice) Regulation 2002 – Part 1.4, section 1.30-1a,b p35
[5] ACT Gambling and Racing Control (Code of Practice) Regulation 2002 – Part 1.4, section 1.29-1c, p35
[6] ACT Gambling and Racing Control (Code of Practice) Regulation 2002 – Part 1.4, section 1.29-4a, p36
[7] ACT Gambling and Racing Control (Code of Practice) Regulation 2002 – Part 1.4, section 1.29=4b,c, p36
[8] ACT Gaming Machines Act 2004 – Part 10, Clause 154-1, p139

NSW

Advertising

- Venues must not publish any gaming machine advertising.[9]
- Venues must not display any gambling related signage outside the venue or which can be seen from outside the venue. [10]

Player Reward Schemes

- Hotelier or clubs must not:[11]
  - offer or present a promotional prize in the form of cash, or
  - offer or present a promotional prize that exceeds $1,000 in value, or
  - permit a patron of the hotel or the premises of the club to exchange a promotional prize for cash, or
  - permit any bonus or reward points accumulated under a player reward scheme to be redeemed for cash.
  - *(exception to above: promotional prizes that form part of a jackpot prize under an authorised linked gaming system)*
- If a hotelier or club conducts a player reward scheme, the hotelier or club must: [12]
  - advise the participants in the scheme of the availability of player activity statements that relate to the playing of approved gaming machines under the scheme, and
  - provide each such participant with a player activity statement.

Self-Exclusion

- EGM venues must ensure patrons have access to a self-exclusion scheme and publicise the availability of the scheme.[13]

[9] NSW Gaming Machine Act 2001 - Part 4, Division 3, 43-1, p26
[10] NSW Gaming Machine Act 2001 - Part 4, Division 3, 44-1, p27
[11] NSW Gaming Machine Act 2001 - Part 4, Division 3, 45-1-3, pp29-30
[12] NSW Gaming Machine Act 2001 - Part 4, Division 3, 45-4, p30
[13] NSW Gaming Machine Act 2001 - Part 4, Division 3, 49-4, p32

NSW (continued)

CASINOS

Advertising

- Must not publish or cause any advertising to be published related to gaming machines (see section 70A of Casino Control Act 1992)
- Must not publish or cause to be published advertising that suggests winning a prize is a likely outcome of participating in gambling activities.[14]
- Any advertising in writing in a newspaper, magazine, poster or other printed form must contain the following statement:[15]

  "Think! About your choices
  Call Gambling Help
  1800 858 858
  www.gamblinghelp.nsw.gov.au"
- May send promotional material that contains advertising relating to gaming machines to a member of the membership program established by the casino only if: [16]
  - The member has consented to receive the info and the casino has kept a written record of this; and explains that the member can withdraw their consent at any time.
  - The info explains that player activity statements are available upon request.
  - Contains a problem gambling notice.
  - Contains other information or advertising apart from advertising related to gaming machines.

Inducements

- Must not offer or supply free or discounted alcohol as an inducement to participate in gambling.[17]
- Must not offer free credits to players or as an inducement to people to become players of EGMs by means by letter box flyers, shopper dockets or similar means.[18]
- Must not offer any prize or free giveaway that is indecent or offensive in nature as an inducement to play EGMs.[19]

[14] NSW Casino Control Regulation 2009 – Part 4, Division 3-33-1e, p22
[15] NSW Casino Control Regulation 2009 – Part 4, Division 3-33-2, p23
[16] NSW Casino Control Regulation 2009 – Part 4, Division 3-34-2, p24
[17] NSW Casino Control Regulation 2009 – Part 4, Division 1-20-1a, p15
[18] NSW Casino Control Regulation 2009 – Part 4, Division 1-20-1b, p15
[19] NSW Casino Control Regulation 2009 – Part 4, Division 1-20-1c, p15

NSW (continued)

HOTELIERS & CLUBS

Prizes

- Prizes or promotions that are indecent or offensive must not be offered.[20]

EGM Inducements

- Must not offer or supply free or discounted alcohol as an inducement to play EGMs.[21]
- Must not offer free credits to players or as an inducement to people to become players of EGMs by means by letter box flyers, shopper dockets or similar means.[22]
- Must not offer any prize or free giveaway that is indecent or offensive in nature as an inducement to play EGMs.[23]

Player Cards & Accounts (rewards schemes)

- Cards must not be issued to anyone under 18 years (must show ID to join) and can only issue one card per person.[24]
- Must issue a card along with warning and problem gambling notice, and card must show the Gambling Help Line.[25]
- Must also inform that person can set weekly limits on card.[26]
- If scheme relates to playing EGMs, membership must be optional at all times. [27]
- Cannot extend cash advances or any other form of credit.[28]
- Cards cannot hold more than $200.[29]
- Transaction records must be provided to member following each transaction.[30]

[20] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 49, p31
[21] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 55a, p34
[22] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 55b, p34
[23] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 55c, p34
[24] NSW Gaming Machines Regulation 2010 – Part 6, section 96-1-3, p52
[25] NSW Gaming Machines Regulation 2010 – Part 6, section 96-4-5, p52
[26] NSW Gaming Machines Regulation 2010 – Part 6, section 103-2, p52-53
[27] NSW Gaming Machines Regulation 2010 – Part 6, section 97-1-2, p52-53
[28] NSW Gaming Machines Regulation 2010 – Part 6, section 98-2, p53
[29] NSW Gaming Machines Regulation 2010 – Part 6, section 99-1, p53
[30] NSW Gaming Machines Regulation 2010 – Part 6, section 100-1, p53

NSW (continued)

HOTELIERS & CLUBS

Player Activity Statements

- Required to be kept by licensee if only player reward scheme is one in which the participant's activity in relation to gaming machines is recorded electronically.[31]
- Must be made available free of charge[32] to participants upon request on a monthly basis and include:[33]
    - Total turnover amount by participant during that month
    - Total wins recorded during that month
    - Net expenditure (turnover less wins) during that month
    - Total points earned and redeemed
    - Total length of time over each 24 hr period as well as over the whole month that the players card was inserted into an EGM
    - Information that player activity statements can be requested must be provided to participant upon joining the scheme and included in any promotional material related to the scheme.[34]
    - Problem gambling notice.[35]

[31] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 48-1, p30
[32] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 48-8, p31
[33] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 48-2-3, p30
[34] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 48-6, p31
[35] NSW Gaming Machines Regulation 2010 – Part 3, division 4, 48-7, p31

NT

Overall note: Cannot find anything specific about loyalty programs or player rewards except a section about inducements.

Credit

- Gambling providers (with the exception of bookmakers) are not to provide credit to anyone for the purpose of gambling.[36]

Advertising and Promotions

- Advertising must comply with the Advertiser Code of Ethics adopted by AANA.[37]
- Advertising at point of sale, or within sight of, must contain appropriate gambling warning signage (same for online gaming licensees).[38]
- Advertising must not contain an inducement to engage in gaming. [39] However exceptions to this include advertising: [40]
    - At licensed premises only able to be seen by people in the premises.
    - Distributed to members of a club and relates only to gaming within the licensed
    - Related to gaming in a casino.
- Inducements include an offer of free transport to licensed premises, free or discounted accommodation, meals, refreshments of liquor or other amenities to a person playing a gaming machine. It also includes an offer of gaming tokens to play a gaming machine, or an offer of jackpots or prizes or gifts that are not available to a person in the normal course of playing a gaming machine.[41]

[36] NT Code of Practice for Responsible Gambling – Section 7.3, p10
[37] NT Code of Practice for Responsible Gambling – Section 8.1, p11
[38] NT Code of Practice for Responsible Gambling – Section 8.6, p12
[39] NT Gaming Machine Regulations – Part 8, Section 39-1A, p25
[40] NT Gaming Machine Regulations – Part 8, Section 39-5A-C, p26
[41] NT Gaming Machine Regulations – Part 8, Section 39-4, p265

QLD

Credit

- No credit is to be provided for the purpose of gambling.[42] [43]

Advertising

- Gaming advertising under the Gaming Machine Act is permitted so long as it is not indecent or offensive, is based on fact, and is not misleading or deceptive.[44]
- Advertising by gambling providers should not focus exclusively on gambling where there are other activities to promote, and where appropriate should contain responsible gambling messages.[45] This includes advertising relating to rewards/loyalty programs.[46] They must be balanced between messages about gambling and other services/ activities offered at the venue.[47]
- Ensure gambling advertising and promotions, including player loyalty/rewards programs (if applicable) include words and/or images that convey the message that gambling is fun when done so in a responsible manner such as:[48]
    - including words and images that reinforce personal responsibility (e.g. 'Bet with your head, not over it').
- All advertising and promotions must comply with the Advertiser Code of Ethics adopted by AANA.[49]
- Gambling advertising and promotions (including player loyalty/ rewards programs) must provide a fair and balanced perspective on gambling, and: [50]
    - Must make available the terms and conditions of a promotion (T&Cs of loyalty/ rewards program participation must be provided with registration materials).[51]
    - Must be based on fact and not mislead or deceive.

[42] QLD Responsible Gambling Resource Manuals – Practice 5.3
[43] QLD Gaming Machine Act 1991, Part 6, Division 6-238-1, p250
[44] QLD Gaming Machine Act 1991, Part 6, Division 2-229, p243
[45] QLD Responsible Gambling Code of Practice – Practice 6.7 & 6.13, p6
[46] QLD Responsible Gambling Resource Manuals – Practice 6.13
[47] QLD Responsible Gambling Resource Manuals – Practice 6.7
[48] QLD Responsible Gambling Resource Manuals – Practice 6.13
[49] QLD Responsible Gambling Resource Manuals – Practice 6.1
[50] QLD Responsible Gambling Resource Manuals – Practice 6.2
[51] QLD Responsible Gambling Resource Manuals – Practice 6.2 (p52, Hotels) (p51, Casinos)

QLD (continued)

Advertising (continued)

- Gambling and advertising promotions (including loyalty/ rewards programs) must not contain messages designed to persuade patrons to gamble in an excessive or irresponsible manner:[52]
    - Not offering free credit or money for purpose of gambling.
    - Not offering free or discounted alcohol to gambling patrons only.
    - Not offering free meals to gambling patrons only.
    - Not implying that participation in the rewards programs improves their chances of winning on a gambling product.
    - Not offering a rewards program that encourages irresponsible play to receive a reward of entry into an additional prize draw.

Exclusion

- Person may give a self-exclusion notice to venue which must be upheld.[53]
- Conversely a venue may exclude a person if they believe them to be a problem gambler. [54]

General loyalty/ reward program features

- Accruing/ redeeming points as part of the loyalty/rewards program must not be exclusively linked with gambling activity – it must also link with other venue activities or services.[55]
- Rewards program advertising must not prioritise cash vouchers in a list of things that points can be redeemed for (hotels only).[56]
- Cash vouchers must make no reference to gambling (hotels only).[57]
- Members must redeem points away from an EGM (hotels only). [58]
- Player loyalty program features and functions including direct mail or email campaigns do not offend prevailing community standards (not indecent or offensive).[59]

[52] QLD Responsible Gambling Resource Manuals – Practice 6.10
[53] QLD Gaming Machine Act 1991, Part 6, Division 10-261, p269
[54] QLD Gaming Machine Act 1991, Part 6, Division 10-261c, p270
[55] QLD Responsible Gambling Resource Manuals – Practice 6.7
[56] QLD Responsible Gambling Resource Manuals – Practice 6.10 (p59, Hotels)
[57] QLD Responsible Gambling Resource Manuals – Practice 6.7 (p56, Hotels)
[58] QLD Responsible Gambling Resource Manuals – Practice 6.7 (p56, Hotels)
[59] QLD Responsible Gambling Resource Manuals – Practice 6.6

QLD (continued)

Casinos - specific

- Casino programs must encourage the use of a range of venue facilities and services.[60]
- Casino programs must offer responsible rewards i.e. every dollar spent across range of casino products/ services receives entry into prize draw. [61]
- Casino loyalty programs must differentiate which members which to receive gambling promotional material by notifying and providing customers with the option to opt out of this direct marketing.[62]
- Responsible gambling messages must be included on player loyalty program membership cards, application forms, and sections on a casino's website, as well as any related correspondence or marketing materials.[63]

[60] QLD Responsible Gambling Resource Manuals – Practice 6.10 (p62, Casinos)
[61] QLD Responsible Gambling Resource Manuals – Practice 6.10 (p62, Casinos)
[62] QLD Responsible Gambling Resource Manuals – Practice 6.10 (p62, Casinos)
[63] QLD Responsible Gambling Resource Manuals – Practice 6.13 (p64, Casinos)

SA

Advertising

- Must comply with community expectations, state and federal laws, industry codes of practices and be socially responsible.[64]
- General gambling advertising must not offer any credit, voucher, or reward as an inducement to participate frequently in any gambling activity.[65] However – a gambling provider may advertise an inducement in the form of participation in an acceptable loyalty program.[66] [67] This can include the following:
    - Drawing attention to the name of the loyalty program and its availability to customers.
    - Publishing the programs T&Cs on a public webpage, on signs in/near the gambling area; or in a document available in or near the gambling area, so long as the T&Cs and benefits are published in their entirety.
    - Participation in an acceptable trade promotion lottery by drawing attention to prizes.
- All gambling advertising must include a mandatory warning message i.e. include the national gambling helpline number.[68]
- Gambling providers must reinforce their responsible gaming policy in appropriate customer newsletters and other communications.[69]

[64] SA Gambling Code of Practice Notice 2013 – Chapter 2, Part 1, Clauses 10-12, p13
[65] SA Gambling Code of Practice Notice 2013 – Chapter 2, Part 1, Clause 13h, p14
[66] SA Gambling Code of Practice Notice 2013 – Chapter 2, Part 1, Clause 16, pp15-16
[67] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 3, Clause 54, p33
[68] SA Gambling Code of Practice Notice 2013 – Chapter 2, Part 3, p16
[69] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 2, Clause 46-5, p30

SA (continued)

Loyalty Program Features

- A loyalty program database must not contain any person who is excluded (whether by formal barring or otherwise).[70]
- Liquor must not be supplied to reward, promote or encourage gambling.[71]
- A loyalty program may offer inducements (in the gambling area) in the form of complimentary non-alcoholic beverages.[72]
- Acceptable loyalty programs must be structured, and:[73]
    - Conducted in accordance with published T&Cs.
    - Advertised consistently with advertising requirements
    - Offer rewards that are proportional to gambling activity (including non-monetary privileges attached to tiers in a stepped rewards system)
    - Offer regular activity statements.
    - May offer "high value patron" status only to those who meet certain criteria (annual gambling of $16K net annually and can sustain this level of gambling indefinitely).[74]
    - Must include a facility for predictive monitoring of gambling activity with the purpose if intervening in cases where there is a risk of problem gambling.
- Gambling providers must also:[75]
    - Establish a gambling account for participants (one per person, unless deemed to be a high value patron).
    - Provide a pre-commitment scheme, and promote the availability of this scheme on any advertising, marketing info and be included in welcome pack upon account sign up. Further, a gambling account cannot be accessed until the person either sets a pre-commitment level or chooses not to.
    - Provide account holders with an account balance following each transaction, when money is withdrawn or upon request from the account holder.
    - Provide account holders with a routine activity statement in writing.

[70] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 2, Clause 43-6, p27
[71] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 2, Clause 47-1c, p30
[72] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 3, Clause 54, 2c p33
[73] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 3, Clause 55, p34
[74] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 3, Clause 57, p35
[75] SA Gambling Code of Practice Notice 2013 – Chapter 3, Part 4, pp35-39

TAS

Advertising

- All gambling advertising must:[76]
    - Comply with the "Code of Ethics" adopted by the AANA.
    - Be socially responsible, not offensive or indecent in nature
    - Not be false or misleading or deceptive in nature.
    - Include responsible gambling messages in all media advertising that incorporates the name and telephone number for the Gambling Helpline, to a size and form as approved by the Commission.

Credit

- Any person who holds a licence under this Act must not make a loan or extend credit in any form to any person (including himself, herself or itself) to enable that person or any other person to participate in a game, gaming or a gaming activity in an approved venue.[77]

Exclusion

- A registered player may exclude himself by written notice, a third party may request a family member to be excluded, venues to keep a list of excluded persons etc.[78]
- Direct marketing to excluded persons is prohibited. [79]

Inducements

- Licensed gambling providers must not provide specific inducements that may lead to problem gambling or exacerbate existing gambling problems. This includes:[80]
    - Incentive based sponsorship.
    - Free vouchers or tokens values greater than $10 which can be used for gambling purposed (including multiple vouchers used at same time where combined value exceeds $10).
    - Any voucher or token must be redeemable for services other than gambling i.e. accommodation, dining, and entertainment *(exception: "premium players").*
    - Free or discounted (including vouchers for) alcohol for consumption on the premises as a reward for gambling *(exception: private gaming areas at casino or where alcohol is provided with food outside of a gaming area).*
    - Requiring people to spend more than $10 for a specific period of time in order to receive an inducement, obtain a prize or enter a specific prize draw *(exception: "premium players").*

[76] Responsible Gambling Mandatory Code of Practice for Tasmania 2013 – Section 1, p8
[77] TAS Gaming Control Act 1993 – Part 5, Division 1-94
[78] TAS Gaming Control Act 1993 – Part 5, Division 3-112
[79] TAS Gaming Control Act 1993 – Part 5, Division 3-112Ib
[80] Responsible Gambling Mandatory Code of Practice for Tasmania 2012 – Section 2, p10

TAS (continued)

Player Loyalty Programs

- Additionally, licensed gambling providers who operate a player loyalty program must:[81]
    - Provide player activity statements to members at least once a year where player activity is recorded and must also show the amount spent.
    - Player activity statements must clearly differentiate between points that have accrued from gambling and non-gambling activities.[82]
    - Detailed information about how the program works is to be provided at time of joining. This must include T&Cs, points accrual details and rewards.[83]
    - Members must be sent self-exclusion and responsible gambling information at least once a year.
    - Members must be able to opt out anytime, and must be notified of their right to opt out of the program at least once a year.
    - Members must be able to access any program information the provider holds about them.
    - Accruing points must not focus exclusively on gambling activities where other activities are available.
    - Accruing points must be the same for all members of the programs (rate must not vary).
    - Membership must not be available to minors or excluded persons.
    - All program documentation must include responsible gambling messages.
    - Not offer members reward greater than $10 which can be used for gambling purposes.
    - Program must not offend prevailing community standards.

Premium Players (Casinos only) – see Premium Player Program Rules document.[84]

This document outlines how PPs are determined and assessed.

Key points:

- From 1 Nov 2014, casinos must provide a dedicated PP area that cannot be viewed from other gambling areas.
- The casino is permitted to serve food and alcohol to PP members whilst gambling in the dedicated PP area.
- The casino is permitted to offer PP members "a range of rewards, benefits, discounts, cash rebated or promotions as determined from time to time by the casino operator."
- Responsible gambling messages must be included on all promotional material.
- Casinos must not conduct direct marketing to a PP member which encourages the member to increase their typical gaming expenditure in order to receive a reward or benefit.

[81] Responsible Gambling Mandatory Code of Practice for Tasmania 2013 – Section 3, p11
[82] Casino Licence Rules 2012 – Section 10.1d, p6; Licensed Premises Gaming Licence Rules – Section 11.1d, p9
[83] Casino Licence Rules 2012 – Section 10.1a, p6
[84] Premium Player Program Rules 1 July 2015 (Tasmanian Gaming Commission)

VIC

Gaming Machine Advertising

- Generally must not be published outside of the gaming machine area (or in the case of casinos, the boundaries of the casino). However gaming machine advertising may be provided to participants of a loyalty scheme.[85]
- Advertising and promotions related to gambling must comply with the code of ethics adopted by the AANA, not be false, misleading, offensive or indecent in nature.[86]

Credit

- Gaming operators/ licensees must not offer credit in any form to allow a person to play a gaming machine.[87]

Loyalty Schemes

- To participate in a loyalty scheme, participants must be given a *written statement*[88] informing them of their rights under the scheme and containing prescribed information regarding the participant's ability to set limits. [89]
- The participant must also agree to receive *player activity statements,* which must be provided at least once a year. [90]
- Loyalty scheme providers must:
    - Not allow a participant to continue playing under the scheme (i.e. not continue to accrue loyalty points) after they have reached their set limits.[91; 92]
    - Not allow an excluded person to join.[93]
    - Remove a participant from the program if they become an excluded person.[94]

Code of Conduct

- It is a condition of Victorian licence holders in the gambling industry to have a Responsible Gambling Code of Conduct (Code of Conduct).[95] The Code of Conduct must specify the following in regards to loyalty schemes:[96]
    - That appropriate information about the scheme will be made available to members and how it will be provided; and

[85] VIC Gambling Regulation Act 2003 – Chapter 3, Division 4, 3.5.34AA.
[86] VIC Ministerial Direction on Responsible Gambling Codes of Conduct – Part A (Standards), Item 16
[87] VIC Gambling Regulation Act 2003 – Chapter 3, Division 3, 3.5.31, p343.
[88] For more info on this see: Gambling Regulations 2015, Part 3, Division 5.
[89] VIC Gambling Regulation Act 2003 – Chapter 3, Division 5, 3.5.36; 3.5.37, pp361-362.
[90] VIC Gambling Regulation Act 2003 – Chapter 3, Division 5, 3.5.36; 3.5.37, pp361-362.
[91] VIC Gambling Regulation Act 2003 – Chapter 3, Division 5, 3.5.36B; 3.5.37, pp361-362.
[92] Note from 1 December 2015, limit setting is via pre-commitment, not loyalty programs; refer Gambling Regulation (Pre-commitment and Loyalty Scheme) Regulations 2014.
[93] VIC Gambling Regulation Act 2003 – Chapter 3, Division 5, 3.5.36C; 3.5.37, pp361-362.
[94] VIC Gambling Regulation Act 2003 – Chapter 3, Division 5, 3.5.36C; 3.5.37, pp361-362.
[95] VIC Gambling Regulation Act 2003 – Chapter 3, Division 2, 3.4.12B, p167.
[96] VIC Ministerial Direction on Responsible Gambling Codes of Conduct – Part A (Standards), Item 7

- Identify how and when participating customers will be informed about any benefits that have accrued as part of the scheme.

- BUT – it does not "need to set out the detail of a customer loyalty scheme. It is sufficient if the code specifies what information will be made available and how this will occur."[97]

[97] VIC Ministerial Direction on Responsible Gambling Codes of Conduct – Part B (Guidelines), Item 7

WA

NOTE: No information could be found on gambling advertising or related loyalty programs.

Credit

- No credit to be given to a person for gaming.[98]

[98] WA Gaming and Wagering Commission Act 1987 - Part V – 63, p88

ADDITIONAL RESOURCES

The following information comes directly from a detailed page on the ***Department of Social Services*** website.[99]

"Advertising restrictions

All states and territories have restrictions on advertising related to gaming machines. The nature of the restrictions varies across jurisdictions. For example, in some states and territories advertising restrictions apply to all gambling products; while in others they apply only to gaming machines.

Restrictions on player loyalty systems / programs

The Australian Capital Territory, New South Wales, Northern Territory, South Australia and Victoria have restrictions on player loyalty systems/programs. For example, in some states cash cannot be offered as a prize, participants are able to limit time play and net loss, and excluded persons are prohibited from participating.

Promotions and inducement restrictions

Gambling related inducements are banned in New South Wales, the Northern Territory and South Australia (from December 2008.)

In NSW gaming machine venues are prohibited from offering free or discounted liquor, or free credits, as inducements for people to play gaming machines. Action may also be taken against individual promotions or inducements offered by a club or hotel that offend responsible gambling practices.

Prize restrictions

In NSW there are restrictions on the value and nature of prizes and bonuses that can be offered to market gaming machines. These apply to all promotional, reward, loyalty or bonus schemes. There is a prohibition on any promotional or loyalty prizes by cash and prizes cannot be exchanged for cash. The limit of the value of a prize is $1,000. Bonus points cannot be converted to cash."

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99 https://www.dss.gov.au/sites/default/files/documents/05_2012/national_snapshot_harm_minimisation.pdf

Table information by state as listed on the ***Department of Social Services*** website. [100]

Responsible agency
ACT Gambling and Racing Commission. **NSW** NSW Office of Liquor, Gaming and Racing, within Communities NSW. **NT** Licensing, Regulation and Alcohol Strategy Division of the Department of Justice and Northern Territory Licensing Commission **QLD** Dept of Employment, Economic Development and Innovation. Office of Regulatory Policy (policy matters). Office of Liquor and Gaming Regulation (operational matters). Office of Racing. **SA** Office of the Liquor and Gambling Commissioner. Independent Gambling Authority. **TAS** Tasmanian Liquor and Gaming Commission. **VIC** Victorian Commission for Gambling Regulation (operational matters). Office of Liquor, Gaming and Racing, Department of Justice and Regulation and Victorian Commission for Gambling and Liquor Regulation (VCGLR) (policy matters) **WA** Gaming and Wagering Commission of Western Australia.

Legislation Administered
ACT Casino Control Act 2006 Gambling and Racing Control Act 1999 Gaming Machine Act 2004 Interactive Gambling Act 1998 Lotteries Act 1964 Pool Betting Act 1964 Race and Sports Bookmaking Act 2001 Racing Act 1999 Unlawful Gambling Act 2009 **NSW** Gaming Machines Act 2001 Casino Control Act 1992 **NT** Gaming Control Act Gaming Machine Act

100 https://www.dss.gov.au/sites/default/files/documents/05_2012/national_snapshot_harm_minimisation.pdf

Legislation Administered (continued)

QLD
Casino Control Act 1982
Casino Control Regulation 1999
Casino Gaming Rule 1999
Gaming Machine Act 1991
Gaming Machine Regulation 2002
Charitable and Non-Profit Gaming Act 1999
Charitable and Non-Profit Gaming Regulation 1999
Charitable and Non-Profit Gaming Rule 1999
Interactive Gambling (Player Protection) Act 1998
Interactive Gambling (Player Protection – Disqualified persons) Regulation 1999
Interactive Gambling (Player Protection) Regulation 1998
Keno Act 1996
Keno Regulation 2007
Keno Rule 2007
Lotteries Act 1997
Lotteries Regulation 2007
Lotteries Rule 1998
Wagering Act 1998
Wagering Regulation 1999
Wagering Rule 1999
Racing Act 2002
Racing Regulation 2003
SA
Gaming Machines Act 1992
Casino Act 1997
Independent Gambling Authority Act 1995
Lottery and Gaming Act 1936
Problem Gambling Family Protection Orders Act 2004
Authorised Betting Operations Act 2000
State Lotteries Act 1966
TAS
Gaming Control Act 1993
TT-Line Gaming Act 1993
VIC
Gambling Regulation Act 2003
Gambling Regulation Regulations 2005
Casino Control Act 1991
Casino Management Agreement Act 1993
WA
Gaming and Wagering Commission Act 1987
Casino Control Act 1984
Casino (Burswood Island) Agreement Act 1985

Consultative committees	
ACT	Gambling Advisory Reference Group
NSW	First, of likely ongoing, NSW Problem Gambling Roundtable held in July 2008
NT	In the process of re-establishing a gambling prevention consultative group
QLD	Responsible Gambling Advisory Committee
SA	Minister for Gambling has convened a Responsible Gambling Working Party.
TAS	Tasmanian Gambling Industry Group Tasmanian Gambling Consultative Group (rarely meets)
VIC	Responsible Gambling Ministerial Advisory Council
WA	None.

Loyalty program?	
ACT	Yes, restrictions on promotions and inducements apply
NSW	Yes, restrictions on promotional prizes.
NT	Permitted.
QLD	Voluntary Player Loyalty Program Guidelines developed to ensure responsible conduct of programs and advertising of programs.
SA	Yes, permitted but subject to Mandatory Code of Practice.
TAS	Yes, but not a reward program.
VIC	Yes, at casino.
WA	Yes, at casino.

Restrictions on player loyalty systems / programs

ACT
Yes, the mandatory Code of Practice has restrictions on inducements and promotions that apply to player loyalty systems across all forms of gambling. For gaming machines specifically, player reward schemes may require or encourage people to gamble a minimum amount to qualify for rewards generally only where the scheme is advertised within the venue or to members directly.

NSW
Yes, cash cannot be offered as a prize and maximum value of prizes limited to $1,000. Player activity statements must also be made available to participants.

NT
No, but since cashless gaming is not allowed, any loyalty programs based on cashless gaming are not allowed.

QLD
Voluntary Player Loyalty Guidelines have been developed and support the Code of Practice. The Voluntary code, which covers all gambling operators, has Guidelines for PLP's, which propose:

- Relevant information is provided at registration to enable players to make informed decisions.

Positive responsible gambling messages are incorporated into PLP features.

SA
Yes, outlined in Mandatory Code of Practice.

TAS
A mandatory code of practice in relation to player loyalty programs is operational.

VIC
Yes, restrictions effective from 1 July 2003 include:

- prescribed information to be provided to new participants and in compulsory annual player activity statements
- distribution of statements and continued participation
- ability for participants to limit time play and net loss
- excluded persons prohibited from participating.

WA
N/A for clubs and hotels.
No for casino

Advertising restrictions

ACT
Yes, the mandatory Code of Practice restricts advertising by all gambling licensees. Licensees must not publish advertising that:

- is false or misleading;
- encourages anyone to contravene a gaming law;
- encourages under 18s to gamble or targets them;
- shows under 25s gambling;
- suggests that gambling is a form of financial investment;
- suggests that skill can influence a game of chance; and
- promotes the consumption of alcohol while gambling.

The licensee of a gambling facility must also not:

- publish advertising that does not include the details of an approved gambling counselling service in the ACT; or
- give any information or promotional material about gambling at the facility directly to a person excluded by the licensee.

There are additional requirements on gaming machine licensees including prohibiting the display of external signs advertising gaming machines.

NSW
Yes, total ban on all off-premises gaming machine advertising, and gaming machine advertising outside venues. Exemptions for:

- trade publications and conventions
- Government responsible gambling campaigns
- accidental or incidental accompaniment to news broadcasts etc.
- if part of other promotional material sent to member by the club or casino and the patron has consented to receiving it.

Restrictions apply to casino advertising (ie, advertising other than gaming machine advertising).

NT
Advertising is to be delivered in an honest and responsible manner. No false impressions of financial gain to be advertised.

Advertising must comply with the Advertising Code of Ethics as adopted by the Australian Association of National Advertises or the Advertising Federation of Australia.

TV adverts to comply with the Federation of Commercial Television Stations (FACTS) Code of Practice.

Advertising restrictions (continued)

QLD
Yes. Advertising related to gaming machines must not be indecent or offensive and must be based on fact. It cannot be false, deceptive or misleading.

Machine gaming must not dominate external signage or promotions.

The voluntary Responsible Gambling Advertising and Promotions Guideline helps the gambling industry ensure advertising and promotions are delivered in a responsible manner with consideration given to the potential impact on people adversely affected by gambling.

It is an offence for promotional material to be distributed to excluded persons.

SA
Yes, mandatory code of practice from 30 April 2004.

TAS
Yes, Gambling Industry Group Voluntary Code of Practice.

A new mandatory code is being established by the Gaming Commission in relation to advertising gambling products.

VIC
Yes, ban from 1 Jan 2005 on the publishing of any gaming machine advertising outside the gaming machine area of an approved venue or the boundaries of a casino. The Gambling Regulation Amendment (Licensing) Act 2009 made amendments to further strengthen the prohibition.

WA
N/A for clubs and hotels.

Regulation 43 of the Gaming and Wagering Commission Regulations 1988 states that betting operators (including casino) are prohibited from publishing advertisements which:

- procures, incites or encourages a person to commit an offence;
- shows a child gambling or at a place where gambling is, or is depicted as, occurring;
- is false, misleading or deceptive;
- suggests that every bet placed with or accepted through the operator will be successful;
- offers a benefit, consideration or return for the person participating in gambling, continuing to gamble or opening a betting account with the operator;

Appendix 4: AUDIT - Brochures/ Website Examples

Cazaly's (Club – QLD)

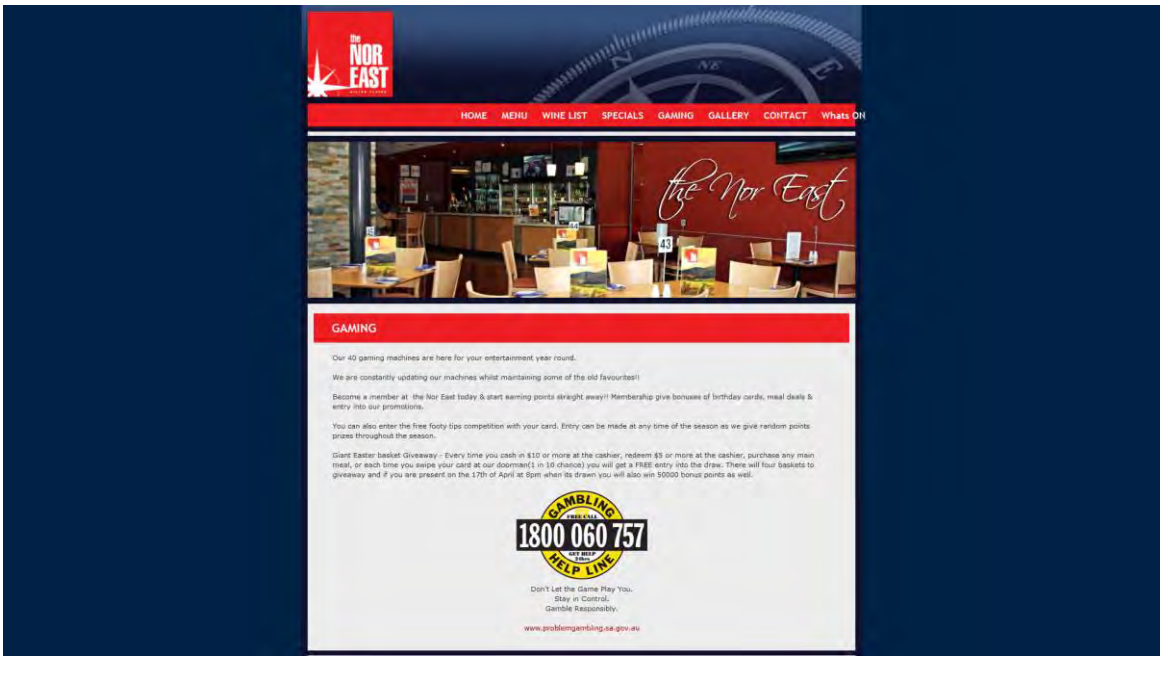
http://cazalys.com.au/loyalty-rewards/

Crown (Casino – VIC)

http://www.crownmelbourne.com.au/crown-signature-club-privileges

The Nor East (Club – SA)

http://noreastclub.com.au/GAMING.aspx

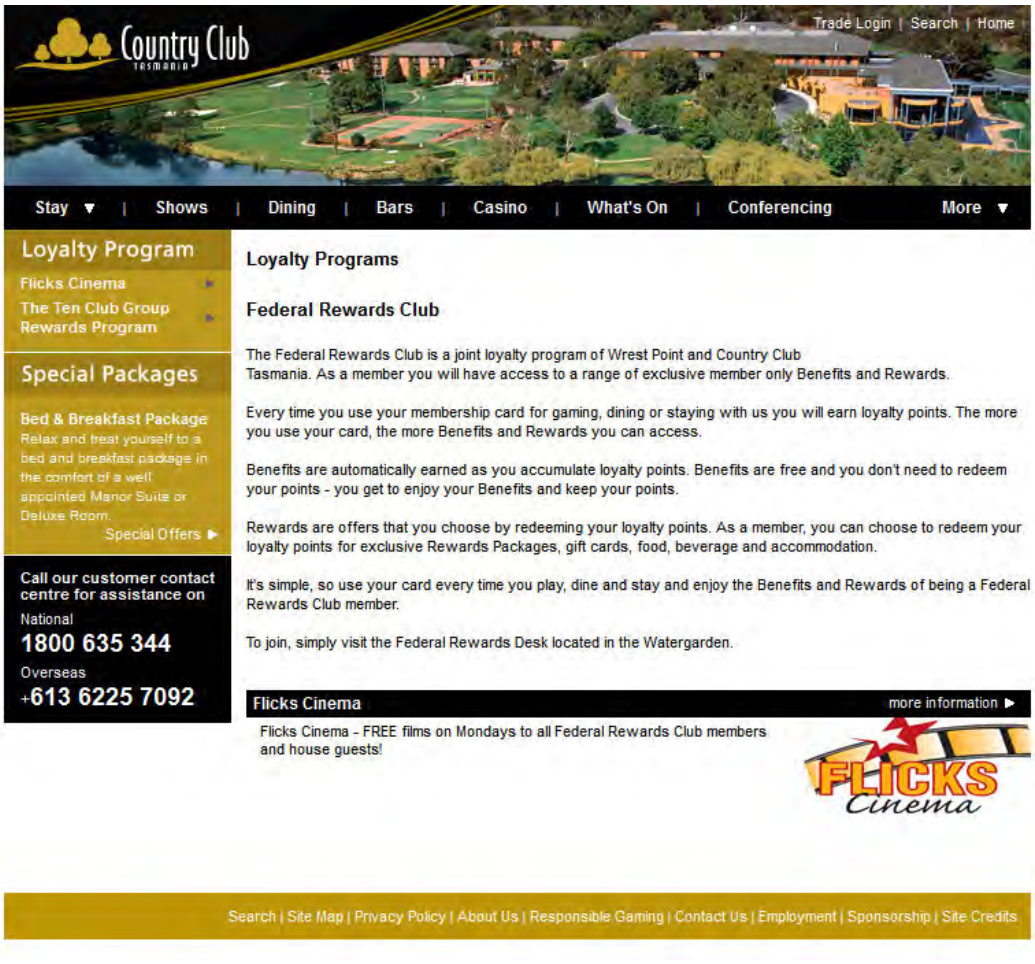


Lasseters Hotel Casino (Casino - NT)

http://www.lasseters.com.au/gaming/rewards

FEDERAL REWARDS CLUB

Example of information on website:



FEDERAL REWARDS CLUB

Example of brochures emailed by Country Club Tasmania and available via PDF on Wrest Point Casino website:

BROCHURE 1 – MEMBERS GUIDE

Page 1

FEDERAL REWARDS CLUB

Example of brochures emailed by Country Club Tasmania and available via PDF on Wrest Point Casino website:

BROCHURE 1 – MEMBERS GUIDE

Page 2

Welcome to the Federal Rewards Club

The Federal Rewards Club is a joint loyalty program of Wrest Point and Country Club Tasmania. As a member you will have access to a range of exclusive member only Benefits and Rewards.

Every time you use your membership card for gaming, dining or staying with us you will earn loyalty points. The more you use your card, the more Benefits and Rewards you can access.

Benefits are automatically earned as you accumulate loyalty points. Benefits are free and you don't need to redeem your points - you get to enjoy your Benefits and keep your points.

Rewards are offers that you choose by redeeming your loyalty points. As a member, you can choose to redeem your loyalty points for exclusive Rewards Packages, gift cards, food, beverage and accommodation.

It's simple, so use your card every time you play, dine and stay and enjoy the Benefits and Rewards of being a Federal Rewards Club member.

How do I earn loyalty points?

- For playing Gaming Machines, TASkeno and selected Table Games**
- For purchases of $10 and above, you will earn five loyalty points for every dollar spent at all Restaurants and Bars at Wrest Point and Country Club Tasmania
- For Accommodation room rates $160 and above, per night you will earn five loyalty points for every dollar spent

How do I redeem my loyalty points for Rewards?

- For cash, present your Federal Rewards Club Card at any Cash Desk and select the amount you would like to redeem between $5 and $10***
- For Gift Cards, Rewards Packages and Events, present your Federal Rewards Club Card at the Service Centre at Wrest Point or FRC Desk at Country Club Tasmania
- For Restaurants and Bars, present your Federal Rewards Club Card directly at participating outlets prior to paying your bill****

How do I earn a Member Meal?

- Play Gaming Machines, TASkeno, Rapid Roulette or selected Table Games
- Earn 150 loyalty points then visit any Gold Centre to print your Member Meal voucher*****
- Present your Member Meal voucher at Watergarden Dining at Country Club Tasmania or Riverview Snacks at Wrest Point and enjoy a delicious meal
- You can earn your Member Meal over any period of time
- Remember, you can only redeem one Member Meal per day; and
- When you redeem your Member Meal, you will start earning loyalty points towards your next Member Meal at the start of your next visit

BENEFITS*

- Earn loyalty points on Gaming Machines, TASkeno, selected Table Games, Accommodation, Restaurants and Bars
- Receive a Member Meal for earning 150 points
- Participate in Member Only Promotions
- Participate in Your Benefits by Choice Program

*Conditions apply.

REWARDS*

Redeem loyalty points for:

- Cash
- Federal Group Gift Cards
- Member only Events
- Rewards Packages
- Food and Beverage

FEDERAL REWARDS CLUB

Example of brochures emailed by Country Club Tasmania and available via PDF on Wrest Point Casino website:

BROCHURE 2 – BENEFITS/ REWARDS BROCHURE

Page 1

Terms & Conditions

Your Benefits by Choice Program Terms and Conditions

1. The loyalty points required to earn this benefit are separate between properties. Points can not be transferred from one property to the other towards earning or claiming this benefit.
2. Your Benefits by Choice Program is also subject to the full Federal Rewards Club Terms and Conditions.
3. Federal Rewards Club members must earn 25,000 loyalty points from either gaming (Gaming Machines, Rapid Roulette, TASkeno and selected Table Games) and/or non-gaming (spend on food, beverage and accommodation).
4. Loyalty points earned for playing TASkeno or selected Table Games may take up to 48 hours to register.
5. Once 25,000 loyalty points have been accumulated, members must print their Your Benefits by Choice voucher at any Gold Centre. Once printed Your Benefits by Choice voucher is valid for 30 days to claim selection.
6. To claim Your Benefits by Choice selection, members must present their Federal Rewards Club Card, valid identification and voucher at the Service Centre at Wrest Point during operational hours.
7. Your Benefits by Choice voucher will be earned for every 25,000 points accumulated, from start of business on 1 September 2012.
8. Loyalty points are not deducted when claiming this benefit.
9. Your Benefits by Choice selections may take up to five days for availability.
10. Accommodation is subject to availability and block out periods. Reservations essential.
11. Your Benefits by Choice selection can not be exchanged and is non transferable or redeemable for cash/points.
12. Wrest Point management's decision is final in the operation of the Your Benefits by Choice Program.

Reward Packages Terms and Conditions

1. Loyalty points earned at both Country Club Tasmania and Wrest Point can be redeemed to participate in these rewards.
2. Rewards Packages are also subject to the full Federal Rewards Club Terms and Conditions.
3. All Rewards Packages must be redeemed from the Service Centre at Wrest Point during operational hours.
4. Rewards Packages are subject to availability and can change without notice.
5. Rewards Packages are valid for six months from date of issue and subject to the validity stated on the vouchers.
6. Rewards Packages content (gift cards, vouchers, etc.) may take up to five days for availability.
7. Reward Packages with an accommodation element are subject to block out periods. Reservations are essential.
8. Loyalty points will be deducted to participate in these Rewards Packages.
9. Rewards Packages can not be exchanged and are non transferable or redeemable for cash/points.
10. Wrest Point management's decision is final in offering Rewards Packages.

For more information please refer to the full Federal Rewards Club Terms and Conditions or call Wrest Point Service Centre on 6221 1700

Have Fun & Play Responsibly

Gamblers Help 1800 858 858

BENEFITS & REWARDS

FEDERAL Rewards CLUB

Introducing

Your Benefits By Choice

and

Rewards Packages

PLAY, DINE AND STAY, YOUR WAY!

Wrest Point

FEDERAL REWARDS CLUB

Example of brochures emailed by Country Club Tasmania and available via PDF on Wrest Point Casino website:

BROCHURE 2 – BENEFITS/ REWARDS BROCHURE

Page 2

Your Benefits By Choice Program

This is a new and exclusive way we are giving all Federal Rewards Club members the chance to select from a variety of benefits.

All members are automatically registered to participate in this Program. All you need to do is use your Federal Rewards Club card every time you play, dine or stay to start earning loyalty points towards the benefit of your choice.

Once you have earned 25,000 loyalty points, visit any Gold Centre to print your voucher. Present your voucher to the Service Centre at Wrest Point and choose from one of the exciting benefits on offer.

Remember, you don't need to redeem your points – this is your bonus for earning points. You get to keep your points, plus you get to enjoy your benefit.

YOUR BENEFITS BY CHOICE*

$150 Federal Group Gift Card*
Accommodation**, plus $20 Free Coin and $20 dining voucher
$160 dining voucher

*Conditions apply.
**Accommodation voucher is valid for one nights stay in a standard room at Country Club Tasmania or Wrest Point.

Rewards Packages

As a valued Federal Rewards Club member you can redeem your Federal Rewards Club loyalty points for specially designed member only Rewards Packages.

Reward yourself today and take advantage of these exclusive packages. Simply visit our friendly staff at the Service Centre at Wrest Point and they will take care of everything.

REWARDS PACKAGES*

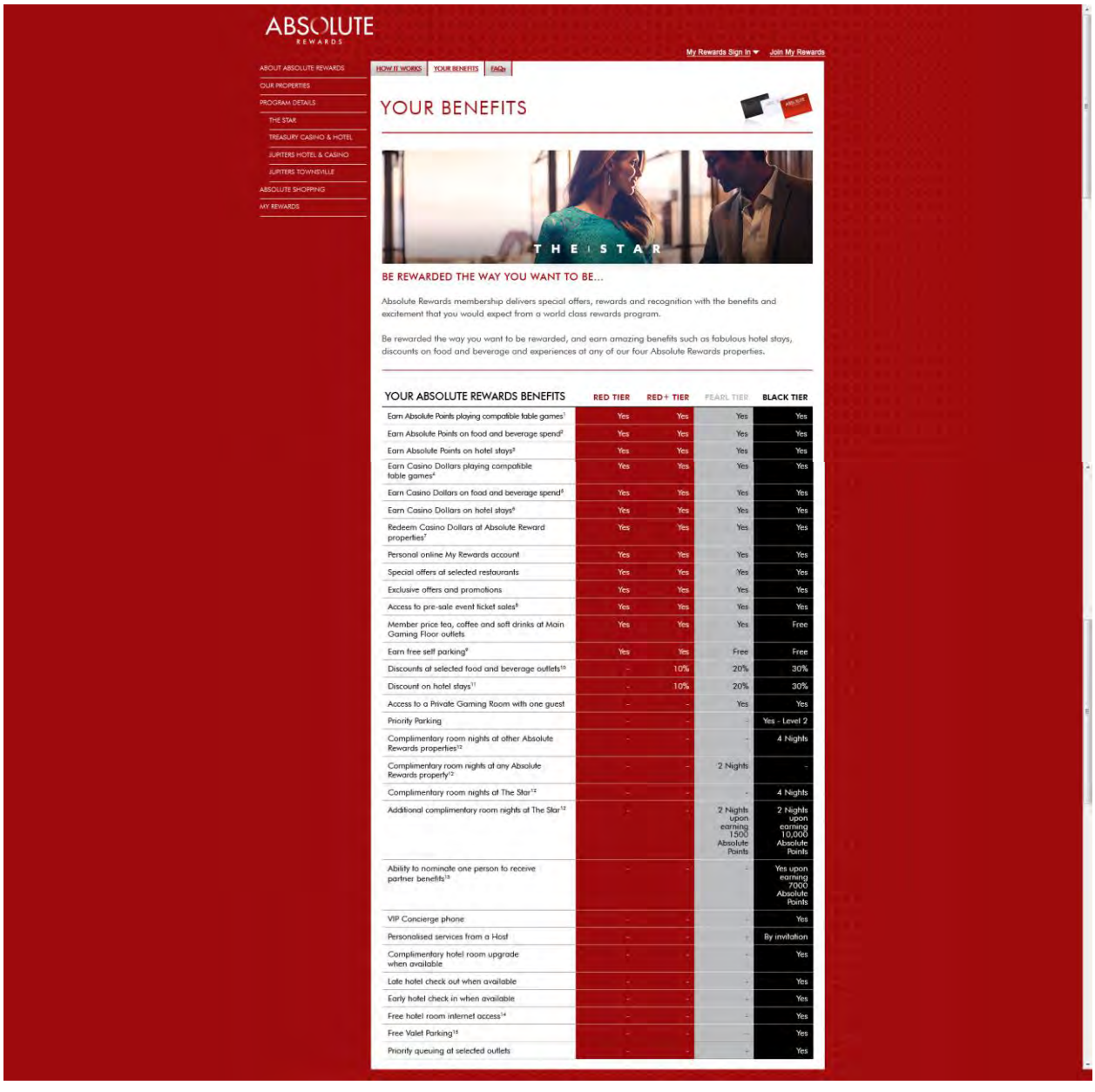
Valet Parking – One Visit Pass** Includes a Valet Parking pass valid for one visit. Valet Parking is available for one vehicle only	500 Loyalty Points
Valet Parking – 12 Visit Pass** (Buy 10 visits, get two free!) Includes a Valet Parking pass valid for 12 visits. Valet Parking is available for one vehicle only	5,000 Loyalty Points
Member Lounge – Two Visit Pass** Includes unlimited access into the exclusive Member Lounge, plus one guest for two visits. Lounge facilities include complimentary soft drink, tea and barista coffee***	2,000 Loyalty Points
Member Lounge – 12 Visit Pass** (Buy 10 visits, get two free!) Includes unlimited access to the exclusive Member Lounge, plus one guest for 12 visits. Lounge facilities include complimentary soft drink, tea and barista coffee***	10,000 Loyalty Points
Member Only Accommodation Package Includes one night standard accommodation, plus $10 Free Coin.	10,000 Loyalty Points
Federal Group Gift Card Package Includes 2 X $50 Federal Group Gift Cards	9,000 Loyalty Points
Federal Group Gift Card Package Includes 2 X $100 Federal Group Gift Cards	18,000 Loyalty Points

*Conditions apply. **A visit is defined as any period of time commencing at start of business and ending at close of business the same day. ***Lounge facilities are limited to two soft drink items, two hot drink items, per visit.

ABSOLUTE REWARDS

Website screenshots of Your Benefits Page:

Page 1



ABSOLUTE REWARDS

My Rewards Sign In | Join My Rewards

ABOUT ABSOLUTE REWARDS
OUR PROPERTIES
PROGRAM DETAILS
THE STAR
TREASURY CASINO & HOTEL
JUPITERS HOTEL & CASINO
JUPITERS TOWNSVILLE
ABSOLUTE SHOPPING
MY REWARDS

HOW IT WORKS | YOUR BENEFITS | FAQs

YOUR BENEFITS

BE REWARDED THE WAY YOU WANT TO BE...

Absolute Rewards membership delivers special offers, rewards and recognition with the benefits and excitement that you would expect from a world class rewards program.

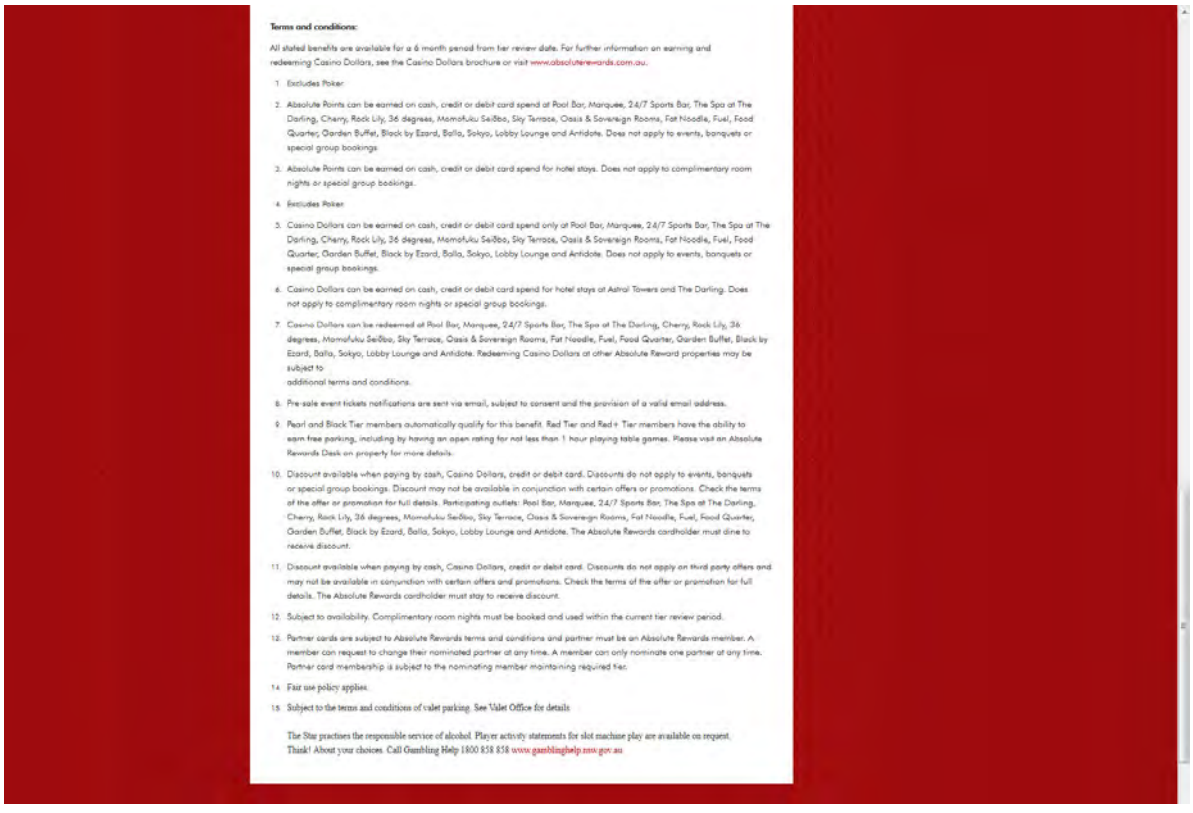
Be rewarded the way you want to be rewarded, and earn amazing benefits such as fabulous hotel stays, discounts on food and beverage and experiences at any of our four Absolute Rewards properties.

YOUR ABSOLUTE REWARDS BENEFITS	RED TIER	RED+ TIER	PEARL TIER	BLACK TIER
Earn Absolute Points playing compatible table games[1]	Yes	Yes	Yes	Yes
Earn Absolute Points on food and beverage spend[2]	Yes	Yes	Yes	Yes
Earn Absolute Points on hotel stays[3]	Yes	Yes	Yes	Yes
Earn Casino Dollars playing compatible table games[4]	Yes	Yes	Yes	Yes
Earn Casino Dollars on food and beverage spend[5]	Yes	Yes	Yes	Yes
Earn Casino Dollars on hotel stays[6]	Yes	Yes	Yes	Yes
Redeem Casino Dollars at Absolute Reward properties[7]	Yes	Yes	Yes	Yes
Personal online My Rewards account	Yes	Yes	Yes	Yes
Special offers at selected restaurants	Yes	Yes	Yes	Yes
Exclusive offers and promotions	Yes	Yes	Yes	Yes
Access to pre-sale event ticket sales[8]	Yes	Yes	Yes	Yes
Member price tea, coffee and soft drinks at Main Gaming Floor outlets	Yes	Yes	Yes	Free
Earn free self parking[9]	Yes	Yes	Free	Free
Discounts at selected food and beverage outlets[10]	-	10%	20%	30%
Discount on hotel stays[11]	-	10%	20%	30%
Access to a Private Gaming Room with one guest	-	-	Yes	Yes
Priority Parking	-	-	-	Yes - Level 2
Complimentary room nights at other Absolute Rewards properties[12]	-	-	-	4 Nights
Complimentary room nights at any Absolute Rewards property[12]	-	-	2 Nights	-
Complimentary room nights at The Star[12]	-	-	-	4 Nights
Additional complimentary room nights at The Star[12]	-	-	2 Nights upon earning 1500 Absolute Points	2 Nights upon earning 10,000 Absolute Points
Ability to nominate one person to receive partner benefits[13]	-	-	-	Yes upon earning 7000 Absolute Points
VIP Concierge phone	-	-	-	Yes
Personalised services from a Host	-	-	-	By invitation
Complimentary hotel room upgrade when available	-	-	-	Yes
Late hotel check out when available	-	-	-	Yes
Early hotel check in when available	-	-	-	Yes
Free hotel room internet access[14]	-	-	-	Yes
Free Valet Parking[15]	-	-	-	Yes
Priority queuing at selected outlets	-	-	-	Yes

ABSOLUTE REWARDS

Website screenshots of Your Benefits Page (T&Cs):

Page 2



Terms and conditions:

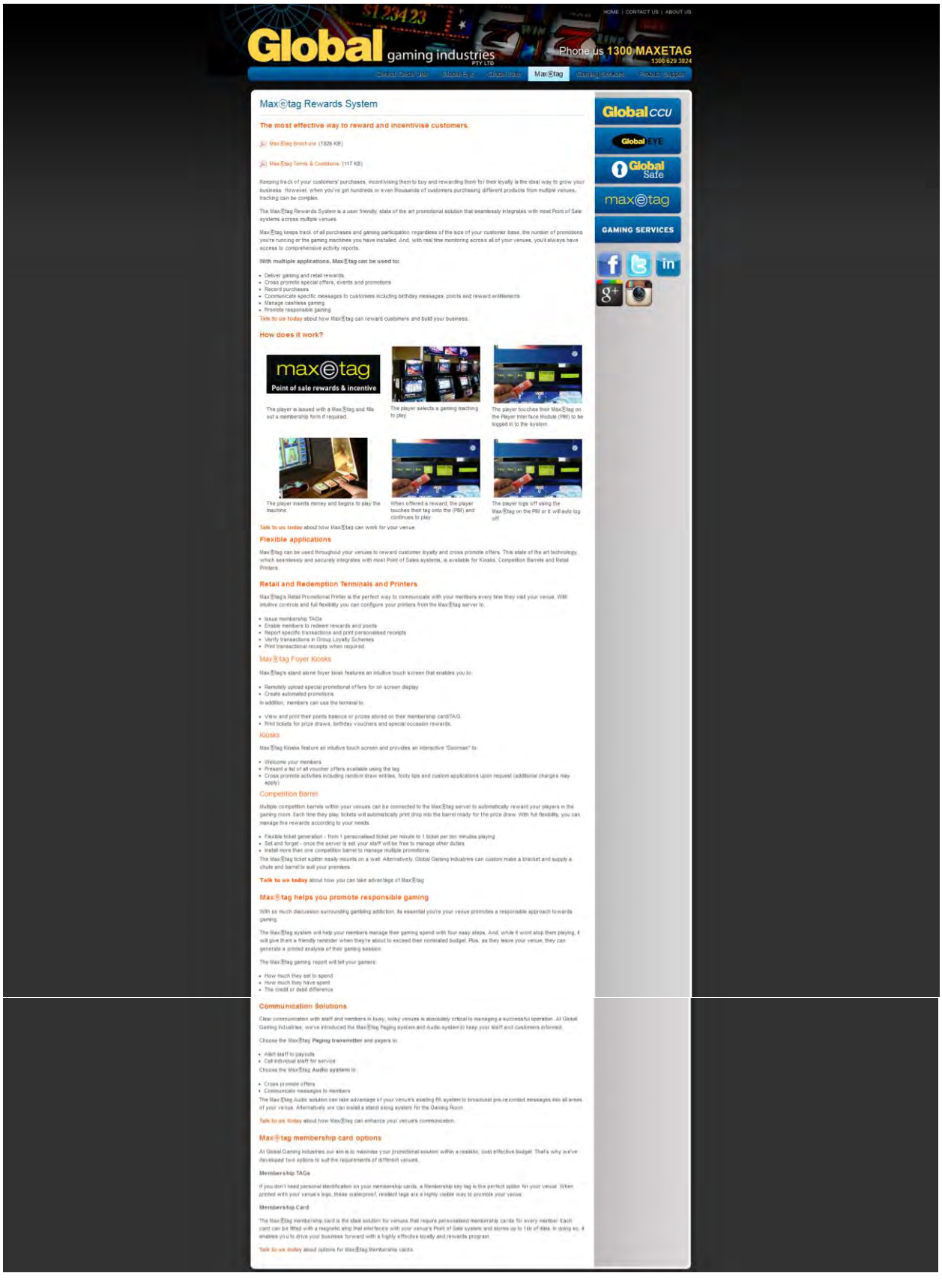
All stated benefits are available for a 6 month period from tier review date. For further information on earning and redeeming Casino Dollars, see the Casino Dollars brochure or visit www.absoluterewards.com.au.

1. Excludes Poker
2. Absolute Points can be earned on cash, credit or debit card spend at Pool Bar, Marquee, 24/7 Sports Bar, The Spa at The Darling, Cherry, Rock Lily, 36 degrees, Momofuku Seiōbo, Sky Terrace, Oasis & Sovereign Rooms, Fat Noodle, Fuel, Food Quarter, Garden Buffet, Black by Ezard, Balla, Sokyo, Lobby Lounge and Antidote. Does not apply to events, banquets or special group bookings.
3. Absolute Points can be earned on cash, credit or debit card spend for hotel stays. Does not apply to complimentary room nights or special group bookings.
4. Excludes Poker
5. Casino Dollars can be earned on cash, credit or debit card spend only at Pool Bar, Marquee, 24/7 Sports Bar, The Spa at The Darling, Cherry, Rock Lily, 36 degrees, Momofuku Seiōbo, Sky Terrace, Oasis & Sovereign Rooms, Fat Noodle, Fuel, Food Quarter, Garden Buffet, Black by Ezard, Balla, Sokyo, Lobby Lounge and Antidote. Does not apply to events, banquets or special group bookings.
6. Casino Dollars can be earned on cash, credit or debit card spend for hotel stays at Astral Towers and The Darling. Does not apply to complimentary room nights or special group bookings.
7. Casino Dollars can be redeemed at Pool Bar, Marquee, 24/7 Sports Bar, The Spa at The Darling, Cherry, Rock Lily, 36 degrees, Momofuku Seiōbo, Sky Terrace, Oasis & Sovereign Rooms, Fat Noodle, Fuel, Food Quarter, Garden Buffet, Black by Ezard, Balla, Sokyo, Lobby Lounge and Antidote. Redeeming Casino Dollars at other Absolute Reward properties may be subject to additional terms and conditions.
8. Pre-sale event tickets notifications are sent via email, subject to consent and the provision of a valid email address.
9. Pearl and Black Tier members automatically qualify for this benefit. Red Tier and Red+ Tier members have the ability to earn free parking, including by having an open rating for not less than 1 hour playing table games. Please visit an Absolute Rewards Desk on property for more details.
10. Discount available when paying by cash, Casino Dollars, credit or debit card. Discounts do not apply to events, banquets or special group bookings. Discount may not be available in conjunction with certain offers or promotions. Check the terms of the offer or promotion for full details. Participating outlets: Pool Bar, Marquee, 24/7 Sports Bar, The Spa at The Darling, Cherry, Rock Lily, 36 degrees, Momofuku Seiōbo, Sky Terrace, Oasis & Sovereign Rooms, Fat Noodle, Fuel, Food Quarter, Garden Buffet, Black by Ezard, Balla, Sokyo, Lobby Lounge and Antidote. The Absolute Rewards cardholder must dine to receive discount.
11. Discount available when paying by cash, Casino Dollars, credit or debit card. Discounts do not apply on third party offers and may not be available in conjunction with certain offers and promotions. Check the terms of the offer or promotion for full details. The Absolute Rewards cardholder must stay to receive discount.
12. Subject to availability. Complimentary room nights must be booked and used within the current tier review period.
13. Partner cards are subject to Absolute Rewards terms and conditions and partner must be an Absolute Rewards member. A member can request to change their nominated partner at any time. A member can only nominate one partner at any time. Partner card membership is subject to the nominating member maintaining required tier.
14. Fair use policy applies.
15. Subject to the terms and conditions of valet parking. See Valet Office for details

The Star practises the responsible service of alcohol. Player activity statements for slot machine play are available on request. Think! About your choices. Call Gambling Help 1800 858 858 www.gamblinghelp.nsw.gov.au

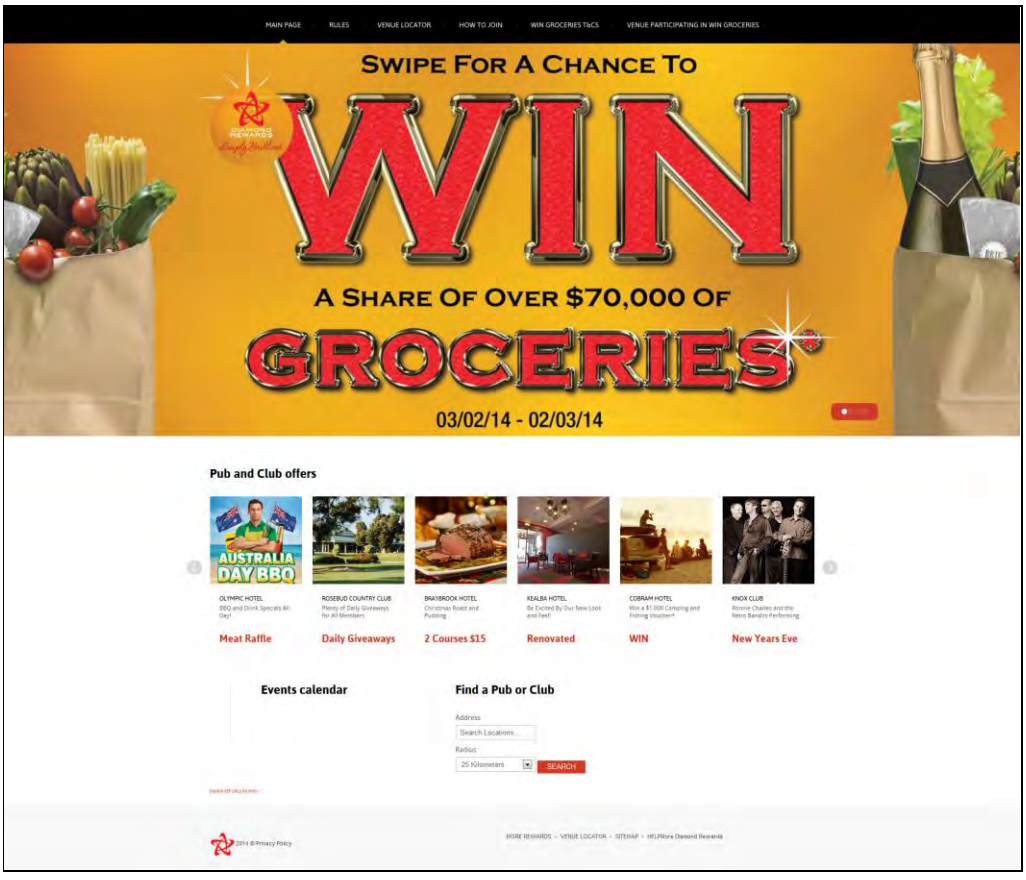
MAXETAG

Website screenshot:



DIAMOND REWARDS

Website screenshot:



CARD IT SYSTEM

Brochure provided via email by Chinchilla RSL (QLD):

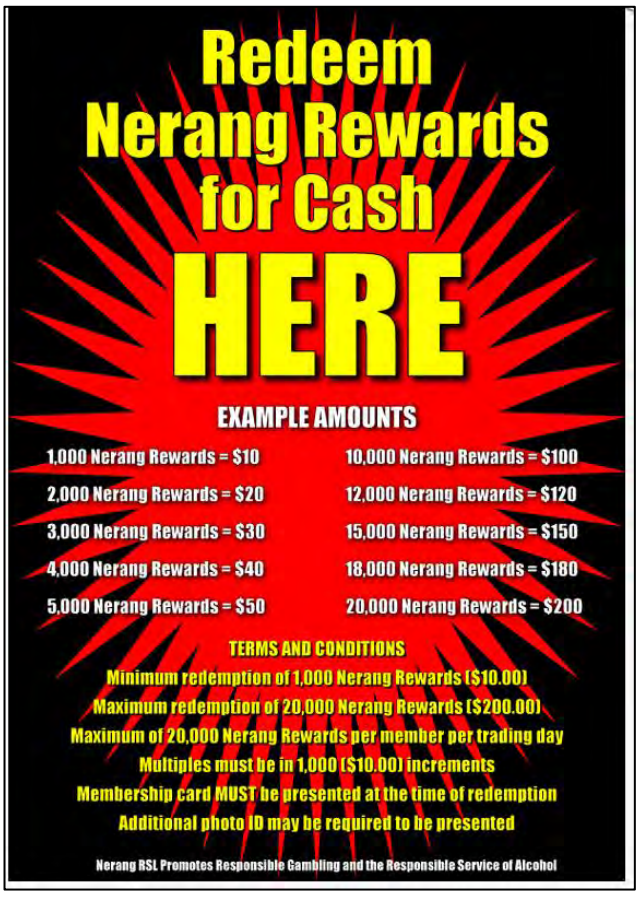
EXAMPLES OF MEMBER PROMOTIONS

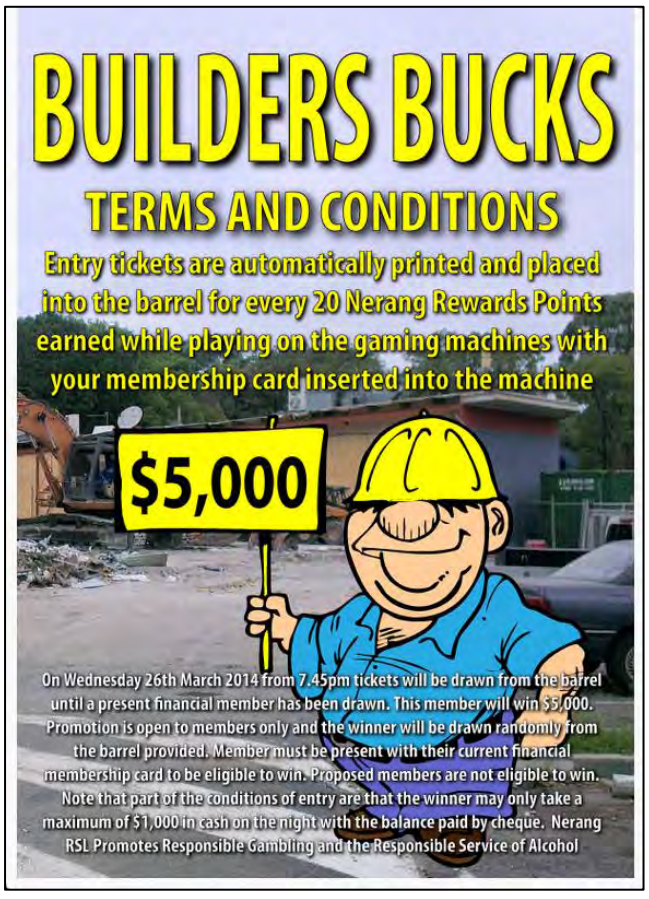
http://bartlettstavern.com.au/index.php/gaming

http://www.wynnummanlyleagues.com.au/blog/wp-content/uploads/2013/10/WinACarFlyer_130414.jpg

Prize draw entry tickets can be won with every (30) thirty dollar win or more on Wynnum Manly Leagues Club poker machines. For example, if a member wins thirty dollars on a poker machine they will receive one (1) prize draw ticket, if they win one hundred dollars on a poker machine they will receive still only one (1) prize draw ticket. The promotion is available only to financial members of the Wynnum Manly Leagues Club, Wynnum Manly Workers Sports Club, Wynnum Manly Leagues Bowls Club. Conditions of entry apply.

http://www.nerangrsl.com/promotions.html





http://zillmeresports.com.au/

2 Ways to gain entry tickets

1. Swipe your membership card through the players kiosk each day in March to gain a ticket into the draw.

2. Play the gaming machines in March and with a $5 win or more an entry ticket will automatically go into the draw. Kiosk entries close Friday 28 March @ 8.15pm. Gaming entries close on Friday 28 March @ 8.25pm.

TERMS & CONDITIONS APPLY & ARE AVAILABLE AT RECEPTION. MEMBERS MUST BE PRESENT TO WIN .

2 Ways to gain entry tickets

1. Swipe your membership card through the players kiosk each day in April to gain a ticket into the draw.

2. Play the gaming machines in April and with a $5 win or more an entry ticket will automatically go into the draw. Kiosk entries close Friday 25 April @ 8.15pm. Gaming entries close on Friday 25 April @ 8.25pm.

TERMS & CONDITIONS APPLY & ARE AVAILABLE AT RECEPTION. MEMBERS MUST BE PRESENT TO WIN .

Appendix 5: ONLINE DISCUSSION BOARDS – Topic Guide

Gambling Research Australia/Department of Justice
The Role of Loyalty Programs in Gambling – Online Discussion Guide

(Ref: 2730)

CONFIRMATION EMAIL

Thank you for agreeing to be a part of our online discussion board regarding the role of loyalty programs in gambling in Australia. Not a lot is known about this topic so we are really looking forward to your input!

The Social Research Group (a division of Market Solutions), a Victorian social research company, has been commissioned by Gambling Research Australia to conduct the study. Your discussion will be hosted by myself, Anna Lethborg from the Social Research Group.

When we **open the discussion on Monday**, an invitation email will be sent to your nominated email address. This email will contain the following important information that will allow you to join the discussion:

1. A website link which will take you to the board's login screen
2. The user name and password you will need to log into the board

The discussion will run for one week with new questions added each day. Around 30 people who are members of loyalty programs at similar venues will be participating in your discussion.

We encourage you to take some time each day to check the board and contribute to the discussion. However, you can provide input at any time over the course of the week. **We will be providing $50 gift vouchers to those who contribute to each topic (answer each question).**

Please note that Market Solutions is a member of the Association of Market and Social Research Organisation (AMSRO). This research will be carried out in compliance with the Privacy Act and any information you provide will be used only for research purposes. **Any comments you make on the board are entirely confidential and you will not be identified in any way during reporting.**

If you have any questions prior to the commencement of the discussion, or find you are unable to participate, please contact me by replying to this email or via phone (03 9372 8400).

8/707 Mt Alexander Rd Moonee Ponds Victoria 3039
T: 03 9372 8400 F: 03 8372 8411
www.marketsolutions.com.au

DISCUSSION BOARD EMAIL INVITATION

Dear Firstname,

The purpose of this discussion (hosted by the Social Research Group) is to provide Gambling Research Australia with information about the role of gambling loyalty programs in Australia.

You have been invited to join:	Gambling Loyalty Programs Discussion Board 1
Your discussion group will start at:	Day and Date at Time am/p.m.
You can login to the discussion at:	XXXXXXXXXXXXXXXXXXXXX

Your login details are:

Username:	XXXXXXXXXXXXXXXXXXXXX
ID Password:	XXXXXXXXXXXXXXXXXXXXX

If you are having any issues logging in please contact alethborg@marketsolutions.com.au

The discussion will run for one week with new questions added several times a day. We encourage you to take some time each day to check the board and contribute to the discussion. However, you can provide input at any time over the course of the week. We will be providing incentive payments of $50 to those who provide **an answer to each question** (if a question is not relevant, or you do not wish to answer, please record "no comment" so we know you have considered the question). You will also be able to discuss the topics with other members of the group who will also be loyalty program members from across Australia.

Please keep this information in a safe place.

Privacy: In accordance with the Privacy Act, please be assured that your comments on the discussion board will be completely anonymous and, hence, your username will be a numerical identifier. Findings from the survey will be reported at aggregate level only and will not enable the identification of any individual respondent.

DISCUSSION BOARD STRUCTURE

All participants will see the broad questions listed as follows (with topic as the heading):

- Broad questions

Throughout the discussion guide, points formatted as follows will be used as moderator prompts:

  - Moderator prompts

DISCUSSION BOARD INTRODUCTION

Hi! Welcome to our discussion regarding playing electronic gaming machines (which we will refer to as 'pokies') and loyalty programs. Before starting, please read the **IMPORTANT** information below:

GETTING STARTED: Participating in the discussion is like commenting on Facebook.

1. **Login at any time** with your username and password.
2. Once logged in, **read any instructions** and then **select a discussion topic**.
3. You will then be taken to the commenting area called the 'workspace'.
4. You can read the current discussion topic, other participants' comments and post comments.
5. **Post a comment** by either entering text in the comment box at the bottom of the screen and posting, or selecting the blue button under the discussion topic.
6. **If you miss a day or run out of time to answer**, you can log back in at any time during the week to complete the questions for previous days and to add any further information.

A FEW TIPS to make sure you qualify for your **$50 gift voucher**:

- **Read every question** in full and answer it in as much detail as you can (time permitting).
- **Record a response under every topic, even if you just write "no comment"** (if you do not wish to answer a particular question) **or "does not apply"** (if a topic is not relevant to you). NOTE: If a topic is not relevant, please explain why it doesn't apply to you as this is also important information for us.
- **Check each topic at the end of the day** to make sure you have provided a response under each (even if it's just "no comment" or "does not apply").

A FEW RULES to make sure we get the most from the discussion:

- **Be honest** so we can get the most from the discussion
- **But not too honest** to protect your privacy (you will not need to provide any identifying details)
- **Engage in friendly banter** as we want to understand different experiences
- **Have fun** as this is an opportunity to share your experiences in a less formal environment

We understand that there is a lot of work involved in participating in the board. We therefore suggest you spend more time providing answers to questions you feel you can comment on in more detail, and provide shorter answers for other questions.

DAY 1 – PLAYING THE POKIES

DAY 1 INTRODUCTION – Welcome to the discussion! Today we will be talking about the pokies (also known as electronic gaming machines, gaming machines, or EGMs) and the types of venues people visit to play the pokies. Feel free to add a comment for each topic and to chat about the topic (write "no comment" if you would prefer not to answer). It is up to you how long you spend on the board each day but from our perspective, the more discussion on each topic, the better! This day will be relatively short to give you a chance to familiarise yourself with the process.

- **TOPIC 1: INTRO** – Please feel free to introduce yourself by providing broad information such as which state you live in, whether or not you are working/retired/other, and so on. Whatever general information you are happy to share with the board so you can get an idea of who you'll be chatting with. Note that you do not provide any identifying information (such as your name).

- **TOPIC 2: POKIE VENUES** – You're participating in the discussion because you have played the pokies at some time. Please tell us a bit about the types of venues you normally visit to play the pokies, such as casinos, clubs, hotels. Do you tend to play the pokies at just one type of venue or does it vary? Why is that?
    - Differentiate between casino/hotel/club

- **TOPIC 3: TIME SPENT AT VENUES** – How much time would you say you spend playing pokies? Out of all this time, about how much of it is spent at each venue? How do you decide how to split your time between venues?

- **TOPIC 4: [VENUE TYPE]** – We'll be focusing our discussion on playing the pokies at [VENUE TYPE]. Why do you choose to play at this type of venue? Do you prefer it over other venue types? Why or why not?
    - Reason for preferring to other venue types

- **TOPIC 5: IMPORTANCE OF POKIES** – Is the main reason you visit a [VENUE TYPE] usually to play the pokies or do you go for other reasons? Every now and again, I'll post a multiple choice question. Your answers to these will be private and will not be shared with the group. Here's the first one: When you visit a [VENUE TYPE], are the pokies: The only reason I visit, the main reason I visit, one of the reasons I visit or would you say I visit for other reasons?

DAY 2 – MEMBERSHIP OF LOYALTY PROGRAMS

DAY 2 INTRODUCTION – Thanks for coming back! Today we'll be discussing loyalty programs, your interest in them and how they work. As you answer the questions, please keep in mind that we're really keen to understand the different types of programs that are out there and how people use them.

This is probably the biggest day as so little is currently known about involvement in loyalty programs, so remember that you can revisit any topics later in the week if you run out of time.

- **TOPIC 6: LOYALTY PROGRAM MEMBERSHIP** – Which gambling loyalty programs are you a member of? For each program, can you please tell me: the name of the loyalty program (if it has a specific name), the type of venue and how long you have been a member? NOTE: please reference the program you are discussing as you answer the following questions.

- **TOPIC 7: REASONS FOR JOINING** – What were your reasons for joining the loyalty program/s? How did you find out about them and how did you sign up? Did you compare loyalty programs when you decided which one(s) to join? Why or why not?
    - Probe to ensure we get how they signed up

- **TOPIC 8: TYPES OF REWARDS** – From now on, please just think about the main loyalty program you use at a [VENUE TYPE]. What kinds of rewards can you get? Which ones do you like most? Which do you like the least or do you find less useful/valuable? How much do you value the rewards you receive from your loyalty program? Are they: very valuable, quite valuable, not very valuable, not valuable at all?
    - Economic rewards (e.g. coupons, discounts, cash, etc.)
    - Psychological rewards (e.g. preferential treatment like shorter lines or VIP room, being called by your name, etc.)

- **TOPIC 9: HOW THE REWARDS WORK** – Please explain how your loyalty membership works and how much you know about it. The types of things we're interested in include: did you receive any rewards when you signed up, does your card accumulate points based on how much you spend or does it reward you per visit, how do you use it, how do you collect rewards, does it have different levels of membership, etc?
    - PROMPT IF NOT MENTIONED:
    - Does it have levels or tiers (e.g. gold and silver membership based on points/visits)?
    - How many points do you need to get rewards?
    - How many points do you get per dollar?
    - Do you accumulate points/rewards for spending on gaming only or food, drinks etc.?
    - Are all the rewards from the venue or are some external (e.g. links to other venues/shops)?

- **TOPIC 10: PROGRAM WEBSITE** – Do you know if your loyalty program has a website and did you look at the website to find out about either the venue or the loyalty program? If yes, what information is included on the website? Does it provide information on your points accumulation? Are there any messages on the website about gambling more generally?
    - Is the website standalone or part of the venue website?
    - How is it used?

DAY 3 – LOYALTY PROGRAM VENUES

DAY 3 INTRODUCTION – Yesterday's discussion was excellent, I really appreciate all the effort you're putting in to the discussion! Today we'll continue the discussion of loyalty programs but this time we're interested in how different venues manage their programs and what that means for members when they visit a venue and when they are playing the pokies.

- **TOPIC 11: YOUR LOYALTY PROGRAM/S** – Thinking about the loyalty program you use most at [INSERT VENUE], how do you feel about it? That is, are you satisfied with it and do you feel it provides you with good value? And does being a member make you feel any different about playing the pokies at the venue? How satisfied are you with this loyalty program, are you: very satisfied, quite satisfied, not very satisfied, not at all satisfied?
    - PROBE: Want to understand if being a member makes them feel any better about losing

- **TOPIC 12: TREATMENT OF MEMBERS** – Have you noticed any differences in the service members receive compared to non-members? Are members treated any differently to non-members, if so, how?

- **TOPIC 13: REFLECTION ON THE VENUE** – We're interested in understanding whether having a loyalty program impacts on people's likelihood of playing the pokies at different venues. Does being a member of a loyalty program change the way you feel about visiting the venue or playing the pokies there? What do you think of venues that do not have loyalty programs and would your opinion of them change if they were to put a loyalty program in place?

- **TOPIC 14: SWITCHING VENUES** – How likely would you be to change your regular venue if another venue offered a better loyalty program? What would need to be on offer? How likely is it that a better loyalty program would influence where you go to play the pokies, is it: very likely, quite likely, not very likely, very unlikely?

- **TOPIC 15: IDEAL LOYALTY PROGRAM** – Overall, what would the ideal loyalty program look like? What would the features be? What is it that makes you want to be part of a loyalty program and collect points/rewards?

DAY 4 – INFLUENCES ON FREQUENCY

DAY 4 INTRODUCTION – It was another great discussion yesterday. Last day tomorrow so we're nearly there! Today we're interested in learning how (and if) loyalty programs impact on how much you play, how often, when, and so on.

Some of the topics we'll be discussing today can be quite personal so please answer as much as you are comfortable with and remember that what you say during the discussion is reported as broad themes and not linked to you (write "no comment" if you would prefer not to answer). Please also remember that your answers to multiple choice questions are private and are not shared with the group.

- **TOPIC 16: PLAY TIME FREQUENCY** – What days of the week and times of day do you normally play the pokies? What factors influence how often you play or how long you spend playing the pokies?
    - Want to try to get regularity without directly asking but probe if required

- **TOPIC 17: LOYALTY PROGRAMS AND FREQUENCY** – How often do you use a membership card or make use of a loyalty program? Do you think having a loyalty program membership encourages you to visit any particular venue more often than you would otherwise? Do you think it encourages you to play the pokies more overall? How much influence does your loyalty program have on **how often** you play the pokies, is it: very influential, quite influential, not very influential, no influence at all?

- **TOPIC 18: LOYALTY PROGRAMS AND TIME** – Do loyalty programs influence how often you play or how long you spend playing pokies? If yes, in what way? If no, why do you think that is? How much influence does your loyalty program have on **how long you spend** playing the pokies, is it: very influential, quite influential, not very influential, no influence at all?

- **TOPIC 19: LOYALTY PROGRAMS AND MONEY** – When playing the pokies, do you tend to go in with an intention to only spend a certain amount of money or do you plan to play for a certain amount of time? What, if any, impact does having a loyalty program membership have on how much money you spend when playing pokies? How much influence does your loyalty program have on **how much money you spend** playing the pokies, is it: very influential, quite influential, not very influential, no influence at all?

- **TOPIC 20: NEGATIVE INFLUENCE** – Can you imagine any scenarios in which being a member of a loyalty program could be harmful? Would they be any more or less harmful for different types of people? How harmful do you think loyalty programs are when it comes to influencing people's behavior and spending, are they: very harmful, quite harmful, not very harmful, not harmful at all?

DAY 5 – COMMUNICATIONS

DAY 5 INTRODUCTION – It is our last day so thank you so much for all the information you have provided so far! As I've mentioned, there is so little known about the link between loyalty programs and playing the pokes so we really value your frankness and you input into the discussion. We're going to finish up by talking about the information provided to members of loyalty programs.

Once you've had a chance to respond to today's topics, please feel free to read back through any previous discussions that you've been particularly interested in and provide any final comments. We will actually keep the board open until **Friday next week (INSERT DATE)**, just in case you would like to continue the discussion. Thanks again for your involvement in this important project!

- **TOPIC 21: COMMUNICATION AT VENUE** – What information is normally provided about the loyalty programs at the venues? How is it presented? Who gives it to you?

- **TOPIC 22: OTHER COMMUNICATION** – What sort of information did you receive when you became a member of the loyalty program and what sort of information have you received since joining? How do you receive it: by email, text, post, etc.? How often do you receive information?

- **TOPIC 23: ACCOUNT INFORMATION** – What, if any, information do you receive on how much you have spent and how this links to your rewards? How do you monitor how much you are spending or what the rewards are as part of your loyalty program? Do you monitor how much you have spent on pokies compared to other things such as food and drink at the venue (if these are all linked to the program) and, if so, how?

- **TOPIC 24: GAMING MESSAGES** – Have you received any information about responsible gambling as part of your loyalty program membership? What information have you seen and where?
    - Prompt if necessary with gambling helpline or messages about gambling responsibly

- **TOPIC 25: GENERAL COMMENTS** – Do you have any other comments you would like to make regarding the importance of loyalty programs and how these might impact on gambling attitudes or behaviour?

THANK AND CLOSE (provide information regarding distribution of incentives)

Appendix 6: SURVEY – Participant Recruitment Form

marketsolutions
socialresearchgroup

GAMBLING RESEARCH AUSTRALIA

The Role of Loyalty Programs in Gambling
Online Participant Recruitment Form

(Ref: 2730)

INTRODUCTION

Thank you for your interest in this important research project. The Social Research Group (a division of Market Solutions), a social research company based in Moonee Ponds, Victoria, has been commissioned by Gambling Research Australia to conduct a study into the role of loyalty programs in gambling in Australia. This will be the first study of its type ever conducted in Australia. You don't have to be a member of a loyalty program to be involved, but we are particularly interested in getting feedback from members.

Market Solutions is a member of the Association of Market and Social Research Organisations (AMSRO). This research will be carried out in compliance with the Privacy Act and any information you provide will be used only for research purposes.

The research will involve 10-20 minute telephone surveys in November 2014 and June 2015 which can be scheduled for a time that is convenient for you. To thank you for your time, everyone who completes the survey will enter a draw for a $500 Coles/Meyer gift voucher.

This initial registration form will only take a couple of minutes to complete, and will allow us to assess whether or not you qualify. Should you change your mind at any time about your participation in the research and wish to be excluded you can contact us and we will remove your name and contact details.

If you have any queries about the research feel free to call the Social Research Group on 03 9372 8400 and ask to speak to the project manager Dr Nina Van Dyke.

www.marketsolutions.com.au/social-research-group

www.gamblingresearch.org.au

www.amsro.com.au/privacy/the-market-and-social-research-privacy-code

PRESS CONTINUE TO TELL US A LITTLE BIT ABOUT YOU

8/707 Mt Alexander Rd Moonee Ponds Victoria 3039
Moonee Ponds Victoria 3039
T: 03 9372 8400 F: 03 8372 8411
www.marketsolutions.com.au/social-research-group

SECTION 1: GAMBLING BEHAVIOUR

Q.1. Have you played an **electronic gaming machine** (also known as gaming machines, EGMs, poker machines or 'pokies') anywhere in Australia in the past…?

(SELECT ONE ONLY – MOST RECENT RESPONSE RELEVANT TO YOU)

Month	1
2 months	2
3 months	3
6 months	4
12 months	5
It's been longer than 12 months	6
I've never played an electronic gaming machine	7

Q.2. ***Ask if never played an EGM, otherwise go to next question***
Have you ever been interested in playing an **electronic gaming machine**?

Yes	1
No (Non-qualifying)	2

Q.3. ***Ask if haven't played an EGM in the past 12 months, otherwise go to next question***
Have you participated in **any** form of gambling in the **past 12 months** (e.g. casinos, lotteries, sports betting, online gambling)?

Yes	1
No	2

Q.4. Some casinos, clubs and hotels offer patrons the opportunity to sign up to receive notices or rewards for attending the venue and may provide a membership or loyalty card.

Regardless of whether you have ever played an electronic gaming machine, are you part of **any sort** of **membership or loyalty program** at a…?

(SELECT ONE RESPONSE FOR EACH VENUE TYPE)

		Yes	No
A	Casino	1	2
B	Club	1	2
C	Or Hotel	1	2

Q.5. ***Ask if part of any membership or loyalty program, otherwise go to next question***
Are any of the membership or loyalty programs that you are a part of **targeted at electronic gaming machines**?

Yes	1
No	2
Don't know	3

Q.6. ***Ask if have participated in any form of gambling in the past 12 months, otherwise go to next question***

Thinking about all forms of gambling in the past **12 months**...

		Never	Some-times	Most of the time	Almost always	Don't know
A	How often have you bet more than you could really afford to lose?	0	1	2	3	4
B	How often have you needed to gamble with larger amounts of money to get the same feeling of excitement?	0	1	2	3	4
C	How often have you gone back another day to try to win back the money you lost?	0	1	2	3	4
D	How often have you borrowed money or sold anything to get money to gamble?	0	1	2	3	4
E	How often have you felt that you might have a problem with gambling?	0	1	2	3	4
F	How often have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?	0	1	2	3	4
G	How often have you felt guilty about the way you gamble or what happens when you gamble?	0	1	2	3	4
H	How often has gambling caused you any health problems, including stress or anxiety?	0	1	2	3	4
I	How often has your gambling caused any financial problems for you or your household?	0	1	2	3	4

SECTION 2: DEMOGRAPHICS

Q.7. Just a few more questions about you. Are you...?

Male..... 1
Female..... 2

Q.8. And are you aged...?

Under 18 years..... 1
18 to 24 years..... 2
25 to 34 years..... 3
35 to 44 years..... 4
45 to 54 years..... 5
55 to 64 years..... 6
65 years or older..... 7
Prefer not to answer..... 8

Q.9. And what is your postcode...?

ENTER POSTCODE..... _____

SECTION 3: CONTACT DETAILS

Q.10. And so we can contact you, please provide us with the following details. Please note that we will need a valid telephone number in order to contact you about the survey. The email address is useful if we are unable to reach you by phone or to notify you of your win in the draw.

NAME..... _____
TELEPHONE NUMBER..... _____
EMAIL ADDRESS..... _____

CLOSE

Should you know anyone else who may be able to help us out with this research, please email them the following link:

www.marketsolutions.com.au/gamblingresearch

Thank you once again for your interest in this important research project. Please expect a call sometime around November to ask you if you would like to complete the survey.

In the meantime if you have any queries about the research feel free to call the Social Research Group on 03 9372 8400 and ask to speak to Nina Van Dyke.

NON-QUALIFYING

Thank you for your time and response, but unfortunately you don't qualify for this research.

Should you know anyone else who may be able to help us out with this research, please email them the following link:

www.marketsolutions.com.au/gamblingresearch

Appendix 7: SURVEY – Questionnaire (wave 1)

social research group

Gambling Research Australia

The Role of Loyalty Programs in Gambling

(Ref: 2730)

SAMPLE DETAILS: FROM ONLINE RECRUITING – ID, Name, telephone number
RANDOM SAMPLE – Telephone number, postcode

INTRODUCTION FOR ONLINE RECRUITS

May I please speak to (INSERT NAME)? REINTRODUCE IF NECESSARY. DO NOT DIVULGE THE NATURE OF THE STUDY TO ANY OTHER PERSON

My name is (…) calling on behalf of Gambling Research Australia from the Social Research Group. You recently registered for our study on the role of loyalty programs in gambling. The results of this study will be used by Gambling Research Australia to inform policy on gambling loyalty programs. The survey will take about 10 or 15 minutes depending on your answers; if it's going to take longer than that, I'll let you know.

Your responses will be held strictly confidential and you are free to stop the interview at any time. My supervisor may listen to parts of this interview to assist in quality control monitoring.

INTRODUCTION FOR RANDOM SAMPLE

My name is (…) calling on behalf of Gambling Research Australia from the Social Research Group. We're conducting a survey about the role of loyalty programs in gambling and need to talk to a wide range of people aged 18 years or older including BOTH gamblers and non-gamblers who have at least some interest in playing the pokies. The results of this study will be used by Gambling Research Australia to inform policy on gambling loyalty programs. The survey will take about 10 or 15 minutes depending on your answers; if it's going to take longer than that, I'll let you know. (IF NOT INTERESTED/DON'T QUALIFY: Is there someone else in your household who might want to do the survey? THEN REINTRODUCE)

Your responses will be held strictly confidential and you are free to stop the interview at any time. My supervisor may listen to parts of this interview to assist in quality control monitoring.

YES, CONTINUE	1
Schedule callback	2
Soft refusal	3
Hard refusal	4
Non qualifying	5
Not a residential number	6

SECTION 1: GAMBLING/POKIE PLAYER STATUS

Q.1. (First I'd like to ask you some general questions about gambling. In the past 12 months, have you spent any money on playing the pokies, also known as electronic gaming machines, at a casino, club, pub or hotel?)

Yes	1
No	2

Q.2. In the **past 12 months**, have you spent any money on playing any gambling activities other than the pokies? These could include betting on table games, horse racing or sports; keno, bingo, gambling over the internet, or informal private betting for money like cards or dice games at home, but **not** lotteries, scratchies or raffle tickets.

Yes	1
No	2

Q.3. **Ask if haven't played pokies in past 12 months – otherwise go to next question.**
Have you **ever** spent money on playing the pokies or electronic gaming machines?

Yes	1
No	2
(Don't know)	98
(Refuse)	99

Q.4. **Ask if haven't played other gambling games in past 12 months, otherwise go to next question.**
Have you **ever** spent money on any of those **other** gambling activities?

Yes	1
No	2
(Don't know)	98
(Refuse)	99

Q.5. **Ask if have never played pokies but HAVE gambled on other activities, otherwise go to next question.**
Why have you never played the pokies? (DO NOT READ OUT) (ACCEPT MULTIPLES)
(VGS, Q.13)

No reason in particular	1
Boring / no interest / other games more fun	2
Past difficulties / issues with pokies	3
Spouse/partner/other person won't allow it	4
Friends don't play pokies	5
Seen pokies harm people / pokies is harmful	6
Never win anything / bad luck	7
Inconvenient location	8
Other (Specify)	95
(Don't know)	98
(Refuse)	99

Q.6. **Ask if have never gambled / not gambled in the past 12 months, otherwise go to next question.**
Why have you not gambled [in the past 12 months]? (DO NOT READ OUT) (ACCEPT MULTIPLES)
(VGS, Q.13)

No reason in particular	1
Waste of money	2
Waste of time	3
Boring / no interest	4
Can't afford it / no money	5
Can't smoke	6
Past difficulties / issues with gambling	7
Spouse/partner/other person won't allow it	8
Friends don't gamble	9
Seen gambling harm people / gambling is harmful	10
Against religion	11
Don't believe in it / don't like it / personal reasons	12
Never win anything / bad luck	13
Have kids / family reasons	14
Illness / can't travel	15
Other (Specify)	95
(Don't know)	98
(Refuse)	99

Q.7. How likely are you to **play the pokies** in the future, would you say you will…? (READ OUT)

Definitely play the pokies in the future	1
Probably play the pokies in the future	2
(Maybe or maybe not)	3
Probably **not** play the pokies in the future	4
Definitely **not** play the pokies in the future	5
(Don't know)	98
(Refuse)	99

IF ANSWER 'NO' AT Q.3 AND 'DEFINITELY NOT' AT Q.7, CODE AS OUT OF SCOPE

Q.8. How likely are you to engage in any **other** form of gambling in the future, would you say you will…? (READ OUT)

Definitely gamble in the future	1
Probably gamble in the future	2
(Maybe or maybe not)	3
Probably **not** gamble in the future	4
Definitely **not** gamble in the future	5
(Don't know)	98
(Refuse)	99

Q.9. **Ask if have played pokies AND other gambling activities in past 12 months, otherwise go to next section**

Thinking about **all** of your gambling over the past 12 months… How **often** have you usually gambled in the last 12 months?
(QGHS, p.34; similar to VGS, Q.8)

DON'T KNOW = 98; REFUSE = 99

RECORD IN TIMES PER WEEK, MONTH OR YEAR

TIMES PER WEEK	_ _ _
TIMES PER MONTH	_ _ _
TIMES PER YEAR	_ _ _

Q.10. And when you gamble, about how long do you usually spend gambling?

ENCOURAGE A GUESS

DON'T KNOW=98; REFUSE=99

RECORD IN HOURS; 1-DIGIT DECIMALS ALLOWED

NUMBER OF HOURS	_ _

Q.11. Thinking about the **last time** you gambled, approximately how much **money** did you bet gambling on that occasion?
(QGHS, p.35)

DON'T KNOW=8888; REFUSE=9999

RECORD DOLLARS	$_ _,_ _ _

SECTION 2: POKIE GAMBLING BEHAVIOUR AND LOYALTY PROGRAM MEMBERSHIP

Q.12. **Ask if have played pokies in past 12 months BUT NOT spent money on other gambling activities in the past 12 months – otherwise go to Q.15.**
How **often** have you usually played the pokies in the last 12 months?
(QGHS, p.34; similar to VGS, Q.8)

DON'T KNOW = 98; REFUSE = 99

RECORD IN TIMES PER WEEK, MONTH OR YEAR

TIMES PER WEEK ..... _ _ _
TIMES PER MONTH..... _ _ _
TIMES PER YEAR ..... _ _ _

Q.13. [FOR QUOTA] Have you played the pokies… (READ OUT; STOP WHEN GET A 'YES')?

Within the past month	1
1-2 months ago.....	2
2-3 months ago.....	3
3-6 months ago.....	4
6-12 months ago	5
(Don't know).....	98
(Refuse)	99

Q.14. When you play the pokies, about how long do you usually stay at the venue?

DON'T KNOW=98; REFUSE=99

RECORD IN HOURS; 1-DIGIT DECIMALS ALLOWED

NUMBER OF HOURS ..... _ _

Q.15. **Ask if have played pokies in past 12 months – otherwise go to next section.**
Thinking about the **last time** you played the pokies, approximately how much **money** did you bet playing the pokies on that occasion?
(QGHS, p.35)

DON'T KNOW=8888; REFUE=9999

RECORD DOLLARS..... $_ _,_ _ _

Q.16. In the past 12 months, have you played the pokies at any of the following types of venues… (READ OUT)?

(DON'T KNOW = 98; REFUSED = 99)

(NOTE: AUSTRALIAN VENUES ONLY)

(NOTE: Enter '0' if have not played pokies at that particular type of venue.)

NUMBER OF PUB/HOTEL VENUES..... _ _
NUMBER OF CLUB VENUES ..... _ _
NUMBER OF CASINO VENUES ..... _ _

Q.17. Do you belong to loyalty programs at any of those venues?… (READ OUT)?

(SHOW ONLY THOSE VENUES WHERE PLAYED POKIES)
(IF NECESSSARY – Venues within Australia only)
(IF NECESSARY: This means you signed up to receive notices, rewards or points for attending the venue or playing the pokies and may have been given a membership or loyalty card.)
(NOTE: IF BELONG TO A LOYALTY PROGRAM ATTACHED TO MORE THAN ONE VENUE, JUST COUNT THIS AS ONE LOYALTY PROGRAM MEMBERSHIP)

(DON'T KNOW = 98; REFUSED = 99)

NUMBER OF PUB/HOTEL VENUES..... _ _
NUMBER OF CLUB VENUES ..... _ _
NUMBER OF CASINO VENUES ..... _ _

Q.18. **Ask if played pokies at more than one venue, otherwise go to Q.21.**
Still thinking about the past 12 months, at which of these venues did you play the pokies **the most?**

NAME OF VENUE ..... _ _

Q.19. **Ask if played pokies at more than one venue AND LP membership at more than one venue, otherwise go to Q.21.**
I'd now like you to think about the venue where you use your loyalty program membership **the most** to play the pokies. Is this [INSERT NAME OF VENUE WHERE PLAY POKIES THE MOST]?

Yes 1
No 2
(Don't know)..... 98
(Refused) 99

Q.20. **Ask if 'No' to previous question, otherwise go to next question.**
Does [INSERT NAME OF VENUE WHERE PLAY POKIE THE MOST] have a loyalty program?

Yes 1
No 2
(Don't know)..... 98
(Refused) 99

Q.21. (If more than one LP): Thinking about the venue where you use your loyalty program the most…

In which suburb is this venue located?

DON'T KNOW=8; REFUSE=9

SUBURB _____ POSTCODE ..... _ _ _ _

Q.22. And in which state is that?

Victoria	1
New South Wales	2
Queensland	3
South Australia	4
Western Australia	5
Tasmania	6
Northern Territory	7
ACT	8
(Don't know)	98
(Refuse)	99

SECTION 3: NON-MEMBERS OF A LOYALTY PROGRAM

Q.23. **Ask if play pokies past 12 months but not a loyalty program member – otherwise go to next section**

Is there any particular reason that you are not a member of a loyalty program?
(DO NOT READ OUT) (ACCEPT MULTIPLES)

No reason in particular	1
Don't know if it has one	2
Doesn't have one	3
Wouldn't use it	4
Don't go enough to make it worthwhile	5
Too confusing or hard to understand how it works	6
Not good enough rewards / no interest in rewards	7
Too hard to accumulate points	8
Spouse/partner/other person won't allow it/doesn't like me to	9
Don't believe/trust in loyalty programs	10
Costs to sign up / didn't want to pay to sign up	11
Concerned about what they would do with this information	12
Worried it would encourage me to gamble more	13
Other (Specify)	95
(Don't know)	98
(Refuse)	99

SECTION 4: LOYALTY PROGRAM MEMBERS

Q.24. **Ask if loyalty program member– otherwise go to next section**
Next I'd like to ask you some more questions about your loyalty program. If you belong to more than one loyalty program please think about the one you use **the most** . If you don't know the answer to some of these questions, just tell me that you don't know and we'll go to the next question.

How long have you been a member of this loyalty program?
(DON'T KNOW = 98; REFUSE=99; 1-DIGIT DECIMALS ALLOWED)

RECORD IN YEARS..... _ _

Q.25. How did you find out about this loyalty program? (DO NOT READ OUT) (ACCEPT MULTIPLES)

Sign / advertising at the venue	1
Electronic kiosk at the venue	2
Website	3
Friends	4
Family	5
Communication (email, mail, phone, etc.)	6
Venue staff	7
Other pokie players at the venue	8
Automatically joined with general venue membership	9
Other (Specify)	95
(Can't recall / Don't know)	98
(Refuse)	99

Q.26. When you signed up, did you receive information about…? (READ OUT) (ACCEPT MULTIPLES)

How to get points	1
How many points you need to get rewards	2
What kinds of rewards you could get	3
A gambling help line number or other information about where to get help for difficulties with gambling	4
Responsible gambling messages	5
(Didn't receive any info) (SINGLE RESPONSE)	6
Anything else (Specify)	95
(Can't recall / Don't know)	98
(Refuse)	99

Q.27. When you signed up, did you get any points or rewards right away? (MULTIPLES ACCEPTED)

Yes -- points	1
Yes – (other) rewards	2
No (SINGLE RESPONSE)	3
(Don't know)	98
(Refused)	99

Q.28. How often do you receive any communications connected to this loyalty program, beyond the initial signup? These might be by mail, email, text, phone, etc. Would you say you get something…? (READ OUT)

Daily	1
Most days a week	2
Weekly	3
Fortnightly	4
Monthly	5
Quarterly	6
Once or twice a year	7
Never	8
(Don't know)	98
(Refuse)	99

Q.29. **Ask if receive communications, otherwise go to Question 30.**
And have you received these communications by…? (READ OUT) (MULTIPLE RESPONSE; CODE ONE AT A TIME)

(DON'T KNOW = 98; REFUSED = 99)

Regular mail	1
Email	2
Text or SMS	3
Telephone	4
Some other way (Specify)	95
(Don't know)	98
(Refuse)	99

Q.30. Do those communications include…? (READ OUT) (MULTIPLES ACCEPTED; CODE ONE AT A TIME)

(DON'T KNOW = 98; REFUSED = 99)

A summary of your spending	1
A summary of your points or tier level	2
Coupons	3
Information about special deals on meals or other **non**-gambling activities	4
Special deals on gambling (for ex, extra points; additional cash back)	5
Chance to win prize draws or information about prize draws	6
Information about special events or other events at the venue	7
Something else (Specify)	95
(Don't know)	98
(Refuse)	99

Q.31. Is there any (other) information they might give you that would help you gamble responsibly?

DON'T KNOW=98; REFUSE=99

(Open Ended) _____

Q.32. When you visit this venue, how often do you use your loyalty program? Would you say you use it…? (READ OUT)

Every time you visit	1
Most times	2
Sometimes	3
Occasionally	4
Rarely	5
Never	6
(Don't know)	98
(Refuse)	99

Q.33. Does your loyalty program have tiers? (IF NECESSARY: By this we mean that if you earn a certain number of points or spend a certain amount you move up a level and get special benefits. For example, there might be a silver tier and a gold tier?)

Yes	1
No	2
(Don't know)	98
(Refuse)	99

Q.34. Do you accrue **points** with your loyalty program which you can then turn in for rewards?

Yes	1
No	2
(Don't know)	98
(Refuse)	99

Q.35. **Ask if accrue points, otherwise go to next question.**
How can you get points? Do you get them… (READ OUT AND CODE EACH ONE)

INTERVIEWER NOTE: **DO NOT INCLUDE** POINTS THEY MIGHT HAVE GOTTEN WHEN THEY INITIALLY SIGNED UP FOR THE LOYALTY PROGRAM

When you swipe your card on entry to the venue..	1
When you insert your card into pokie machines	2
When you present your card at gaming tables or other gaming areas	3
When you present your card with other purchases like food, drinks or accommodation	4
When you present your card at a rewards counter	5
When you present your card at partner venues	6
Some other way (specify)	95
(Don't know)	98
(Refuse)	99

Q.36. Now I'd like to ask about the rewards you can get through your loyalty program. Again, just tell me if you don't know or aren't sure. Which of the following types of rewards can you get through your loyalty program? (READ OUT AND CODE ONE AT A TIME)

(DON'T KNOW = 98; REFUSE = 99)

(NOTE: CODE VIP ROOM AS 'SPECIAL TREATMENT BY STAFF')

Food or meals	1
Non-alcoholic drinks	2
Alcoholic drinks	3
Cash	4
Gambling credits	5
Gift cards (for ex, Myer/Coles)	6
Prizes (e.g. household goods)	7
Venue shop/merchandise	8
Entertainment (for ex, concerts or shows)	9
Accommodation	10
Special treatment by staff	11
Free/discounted parking	12
Something else (specify)	95
(Don't know)	98
(Refuse)	99

Q.37. Have you ever done any of the following … (READ OUT AND CODE ONE AT A TIME)

(DON'T KNOW = 98; REFUSED = 99)

Played for longer than you intended to so you could get more rewards	1
Visited a venue more often than you would otherwise so you could get more rewards	2
Spent more money than you would have otherwise so you could get more rewards	3
(None of these)	4

Q.38. **Ask if loyalty program member at more than 1 venue, otherwise go to Q.39.**
How **often** do you usually play the pokies **at this venue**?
(QGHS, p.34; similar to VGS, Q.8)

RECORD IN TIMES PER WEEK, MONTH OR YEAR

DON'T KNOW=98; REFUSE=99

TIMES PER WEEK	_ _ _
TIMES PER MONTH	_ _ _
TIMES PER YEAR	_ _ _

Q.39. When you play the pokies **at this venue**, about how long do you usually stay?

RECORD IN HOURS; 1-DIGIT DECIMALS ALLOWED

DON'T KNOW=98; REFUSE=99

NUMBER OF HOURS ..... _ _

Q.40. Thinking about the last time you played the pokies at this particular venue, approximately how much money did you spend playing the pokies on that occasion? *(QGHS, p.35)*

DON'T KNOW=98; REFUSE=99

RECORD DOLLARS..... $_ _,_ _ _

Q.41. If this venue **discontinued** its loyalty program, do you think you would play the pokies at this venue much less, a bit less, or the same as now?

Much less	1
A bit less	2
Same	3
(Don't know)	98
(Refuse)	99

Q.42. To what extent do you agree or disagree that having a loyalty program membership results in you gambling more than you would otherwise? (IF NECESSARY – that could be going to the venue more frequently, spending more time there, or spending more money on the pokies)? Do you strongly agree, agree, disagree, or strongly disagree?

Strongly agree	1
Agree	2
(Neither agree nor disagree)	3
Disagree	4
Strongly disagree	5
(Don't know)	98
(Refuse)	99

SECTION 5: ATTITUDES TO VENUES

Q.43. **Ask all pokie players past 12 months – otherwise go to next section**

FOR LP MEMBERS OF ONE VENUE ONLY SAY: Thinking about that venue where you have a loyalty program…

FOR LP MEMBERS WITH MORE THAN 1 LOYALTY PROGRAM MEMBERSHIP SAY: Still thinking about the venue whose loyalty program is the one you use the most…

FOR NON-LP MEMBERS SAY: Thinking about the venue you go to most often to play the pokies…

I'm going to read out some statements about this venue. For each, please tell me if you strongly agree, agree, disagree, or strongly disagree.
(adapted from Leenheer, et al. 2007; included about ½ of the total questions)

Scale: Strongly agree = 1, Agree = 2, Neither = 3, Disagree = 4, Strongly disagree = 5 (Don't know/can't say = 98; Refused = 99)

a) I feel like a part of the family when I'm at the venue.
b) Spending time at the venue is important to me.
c) I trust the management of the venue.
d) I am sure the service that I get at the venue will be the same every time I visit.
e) I tell other people positive things about the venue.
f) I would recommend the venue to other people.
g) If I switched to another venue to play the pokies, I might not receive the same benefits I get at this venue.
h) If I switched to a different venue, I might not receive the service I am used to.

SECTION 6: ATTITUDES TOWARDS LOYALTY PROGRAMS

Q.44. Next I'm going to ask you some general questions about gambling loyalty programs.

(IF NOT A LOYALTY PROGRAM MEMBER, say: Some gambling venues run loyalty programs where you sign up to receive notices, rewards or points for attending the venue or playing the pokies and may be given a membership or loyalty card.)

(READ THE FOLLOWING SLOWLY AND CLEARLY)
There has been some discussion about having **pre-commitment** schemes for pokie players who sign up for a loyalty program that allows them to set limits on the time or money they spend gambling. These schemes could be either voluntary, or mandatory.

Do you think there should be **voluntary** pre-commitment schemes, **mandatory** pre-commitment schemes, or **no** pre-commitment schemes?

Mandatory only	1
Voluntary only	2
Neither – no pre-commitment schemes	3
(Don't know)	98
(Refuse)	99

Q.45. **Ask if mandatory, otherwise go to next question.**
What if this would mean you couldn't accrue as many loyalty points – Do you still agree there should be mandatory pre-commitment schemes for pokie players?

Still agree	1
No longer agree – should be voluntary	2
No longer agree – no pre-commitment	3
(Don't know)	98
(Refuse)	99

Q.46. Next I'm going to read you some statements about loyalty programs. For each, please tell me if you strongly agree, agree, disagree, or strongly disagree.

Scale: Strongly agree = 1, Agree = 2, Neither = 3, Disagree = 4, Strongly disagree = 5 (Don't know/can't say = 98; Refuse = 99)

a) Gambling loyalty programs are a good idea.
b) Gambling loyalty programs make people more **loyal** to a particular venue, so they go there rather than to other venues.
c) Gambling loyalty programs make people gamble **more than** they would otherwise.

SECTION 7: REPONSIBLE GAMBLING MESSAGES

Q.47. **Ask if loyalty program member, otherwise go to Q.47.**
Next I'd like to ask about responsible gambling messages you might have seen **at a pokies venue** or in communications sent to you **by a venue**. Have you seen or heard any of the following? (READ OUT) (ACCEPT MULTIPLES)

INTERVIEWER NOTE: WE ONLY CARE IF THEY'VE SEEN THESE AT THE VENUE OR IN COMMUNICATIONS.

Scale: Yes = 1, No = 2, (Don't know = 98; Refuse = 99))

a) Advertising encouraging people to gamble responsibly.
b) The 'Gambling Helpline' phone number.
c) Face-to-face gambling help services for gamblers in your area.
d) Gambling help online

Q.48. **Ask if heard or saw any of the above, otherwise go to next question.**
Do you remember if you saw any of those…? (READ OUT AND CODE ONE AT A TIME) (ACCEPT MULTIPLES)

Posted on gaming machines at the venue	1
Posted on an information board at the venue...	2
Posted elsewhere at the venue.....	3
In materials you received when you signed up for a loyalty program.....	4
In other communications from the venue	5
Other (Specify).....	95
(Don't know).....	98
(Refuse)	99

Q.49. Is there anything else you would like to say about gambling loyalty programs?

(Open Ended) _____

SECTION 8: PROBLEM GAMBLING

Q.50. **Ask all who have gambled in the last 12 months– otherwise go to next section**
I'm now going to read out some statements about gambling. I know some of them are a bit personal, or may not relate to your situation, but they are very important for understanding gambling behaviours. We need to ask the same questions of everyone. For each, please tell me if you strongly agree, agree, disagree, or strongly disagree.

Scale: Strongly agree = 1, Agree = 2, Disagree = 3, Strongly disagree = 4; Don't know = 98; Refuse = 99

a) Gambling makes me feel really alive.
b) I could stop gambling for weeks without feeling the need to gamble
c) I could cut down easily on my gambling
d) I feel angry when I lose at gambling.
e) If you have never experienced the excitement of making a big bet, you have never really lived.
f) I don't like to quit when I'm losing.
g) If I have lost my bets recently, my luck is bound to change.
h) I have carried a lucky charm when I gambled.
i) If I were feeling down, gambling would probably pick me up.
j) Gambling is my best way to experience high sensation.

Q.51. *[FOR QUOTA]* The next questions refer to all of your gambling in the **past 12 months**.
Thinking about the past 12 months… (READ OUT SCALE)
(PGSI)

Scale: Never = 1, Sometimes = 2, Most of the time = 3, Almost always = 4; Don't know = 98; Refuse = 99

a) How often have you bet more than you could really afford to lose? Would you say… ?
b) How often have you needed to gamble with larger amounts of money to get the same feeling of excitement?
c) When you gambled, how often did you go back another day to try to win back the money you lost?
d) How often have you borrowed money or sold anything to get money to gamble?
e) How often have you felt that you might have a problem with gambling?
f) Still thinking about the past 12 months, how often has gambling caused you any health problems, including stress or anxiety?
g) How often have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?
h) How often has your gambling caused any financial problems for you or your household?
i) How often have you felt guilty about the way you gamble or what happens when you gamble?

Q.52. On how many days in the past 12 months did you **binge on gambling** – that is, spend a significantly larger than usual amount in a shorter than usual period of time?
(VGS, Q.17_10)

DON'T KNOW = 888; REFUSE = 999

RECORD NO. DAYS IN THE LAST 12 MONTHS..... _ _ _

Q.53. **Ask if binged any days, otherwise go to next question.**
Which **single gambling activity** did you mostly play when you binged? (ONE ONLY)
(adapted from VGS, Q.18_10) [IF NECESSARY: For example, the pokies, online betting, sports betting, etc.]

Pokies	1
Something other than the pokies	2
(Don't know)	98
(Refuse)	99

Q.54. The following questions are designed to identify how you personally feel about your gambling right now. For each question, please tell me if you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree. (READ OUT SCALE)

(adapted from VGS, Q.61_10)

Scale: Strongly agree = 1, Agree = 2, Neither agree nor disagree = 3, Disagree = 4, Strongly disagree = 5; Don't know = 98; Refuse = 99

a) I enjoy my gambling but sometimes I gamble too much. Would you say you… (READ OUT SCALE)
b) Sometimes I think I should cut down on my gambling.
c) It's a waste of time thinking about my gambling.
d) I have just recently changed my gambling habits.
e) Anyone can talk about wanting to do something about gambling, but I am actually doing something about it.
f) My gambling is a problem sometimes.
g) There is no need for me to think about changing my gambling.
h) I am actually changing my gambling habits right now.
i) Gambling less would be pointless for me.

SECTION 9: DEMOGRAPHICS

Q.55. Now just a few questions to ensure we've spoken with a good range of people.
[GENDER] (RECORD GENDER AUTOMATICALLY; IF UNSURE, ASK)

Male	1
Female	2
(Refuse)	99

Q.56. [AGE] What is your age?
(REFUSED=999)

RECORD AGE _____

Q.57. ***Ask if refused age, otherwise go to next question***
Do you mind telling me if you're… (READ OUT)?

18 to 24	1
25 to 34	2
35 to 44	3
45 to 54	3
55 to 64	3
65 or older	4
(Refused)	99

Q.58. [SES]
[EDUCATION] What is the highest level of education you have completed?

Year 9 or less	1
Year 10	2
Year 11	3
Year 12	4
Certificate / diploma / advanced diploma	5
Bachelor degree or higher	6
Other	7
(Refused)	99

Q.59. [MAIN ACTIVITY] What is your MAIN day-to- day activity? Is it… (READ OUT)

Work full time or part time	1
Home duties	2
Student	4
Unemployed	5
Retired	6
Other	7
(Refused)	99

Q.60. [SES]
[OCCUPATION] **Ask if work, otherwise go to next question**
What type of work do you do?

Manager	1
Professional	2
Technicians and trades workers	3
Community and personal services worker	4
Clerical and administrative worker	5
Sales worker	6
Machinery operators and drivers	7
Labourers	8
Other	9
(Refused)	99

Q.61. [SES]
[HOUSEHOLD INCOME] What is your total annual **household income** before tax or anything else is taken out? Would it be… (READ OUT)

Negative or Zero income	1
Less than $20,000	2
$20,000 to less than $40,000	3
$40,000 to less than $60,000	4
$60,000 to less than $80,000	5
$80,000 to less than $100,000	6
$100, 000 to less than $150,000	7
$150,000 or more	8
(Don't know)	98
(Refused)	99

Q.62. [SES]
[PERSONAL INCOME] What is your total annual **personal** income before tax or anything else is taken out? Would it be… (READ OUT)

Negative or Zero income	1
Less than $20,000	2
$20,000 to less than $40,000	3
$40,000 to less than $60,000	4
$60,000 to less than $80,000	5
$80,000 to less than $100,000	6
$100, 000 to less than $150,000	7
$150,000 or more	8
(Don't know)	98
(Refused)	99

Q.63. [ATSI] Do you identify yourself as Aboriginal or Torres Strait Islander? (ALLOW MULTIPLES)
(QGHS, Q.98)

Yes - Aboriginal	1
Yes – Torres Strait Islander	2
No – neither (SINGLE RESPONSE)	3
(Don't know)	98
(Refused)	99

Q.64. [LOCATION] What is your postcode?
(IF REFUSE: We would really like your postcode so we can analyse the results by region)

(Don’t know=9998; Refused=9999)

POSTCODE _____

Q.65. [LOCATION] And what is your suburb or town?
(IF REFUSE: We would really like your suburb so we can analyse the results by region)

(Don’t know=9998; Refused=9999)

SUBURB OR TOWN _____

CLOSE:

Q66. Thanks for that. If it's ok, we will be re-contacting you in about six months to do another survey, to see if your gambling or attitudes towards gambling or loyalty programs have changed. Is that ok?

Yes – (CONTINUE).....	1
Soft refusal (GO TO Q.69).....	2
Hard refusal (GO TO Q.69)	3

Q67. It's **really** important that we collect as many contact details from you as we can, in case you move or change phone numbers, so we can still get in touch with you. We have the following number/s on record for you. (Is this/are these) the best phone number/s to reach you on? [DISPLAY NUMBER/S CALLED/ON FILE – ASK IF THIS IS BEST NUMBER]

RECORD PHONE NUMBER (Repeat back to ensure it's correct)

Q68. And is there another telephone number you use that we might be able to reach you on?

RECORD PHONE NUMBER (Repeat back to ensure it's correct)

Q69. Do you have an email address? We would only use this if we can't reach you on the phone?

RECORD EMAIL (Repeat to ensure correct)

Q70. And just in case we're still unable to reach you, is there a phone number or email address of a family member or friend we might be able to contact to try to contact you? We would only use this contact information if we had tried all other ways to reach you. We would not disclose the nature of the study to that person.

RECORD PHONE NUMBER (Repeat to ensure correct)
RECORD EMAIL (Repeat to ensure correct)

Q71. As part of quality control procedures, someone from our project team may wish to re-contact you to verify a couple of responses you provided today. For this reason, and so when we re-contact you we can ask for you by name, may I please have your first name?

RECORD FIRST NAME

Q72. Finally, we're still looking for more people to participate in this study. Would you happen to know someone who either plays the pokies or is interested in playing the pokies who might be interested in participating in this study? If they complete this survey, both you and they will be entered into a draw to win a $500 Coles/Myer gift voucher. We will be calling people until 15 June. (If yes: Can I either read you the link to the online registration page, send you an SMS with the link, or else I can send it to your email address)

READ LINK: www.marketsolutions.com.au/gamblingresearch
Or
SEND SMS
Or
RECORD EMAIL (Confirm that same email as provided above / Repeat back to ensure it's correct)

Thank you so much for your time and responses. My name is (…) from Social Research Group. If you have any queries about this survey feel free to call this office during business hours – would you like the number? (Provide number if required – 03 9372 8400 and ask to speak to Nina Van Dyke). If you have any general queries, you can call the Market Research Society's Survey Line on 1300 364 830.

If you would like to talk to someone about any difficulties you are having around gambling, the free phone number for gambling help line is 1800 858 858. They provide support 24 hours a day, 7 days a week. (IF NECESSARY: I also have a number for Lifeline, which provides crisis support 24 hours a day, 7 days a week. Would you like that number? **13 11 14**. BeyondBlue can help you with anxiety or depression 24 hours a day, 7 days a week. Would you like that number? **1300 22 4636)**

ANSWERING MACHINE MESSAGE SCRIPT FOR ONLINE RECRUITS
Hello [FIRST NAME], my name is (...) from the Social Research Group, calling about a research project we are conducting for which you recently completed an online registration form. I will try calling you again in the next day or two. Thanks.

ANWERING MACHINE MESSAGE SCRIPT FOR COLD CALLING
Hello, my name is (...) from the Social Research Group, calling about an important research study. I will try calling you again in the next day or two. Thanks.

UNDER 18 YEARS SCRIPT
Sorry, but for this study we need to speak to people aged 18 and over. Thanks for your time and responses.

NO INTEREST IN POKIES SCRIPT
Sorry, but for this study we need to speak with people who have at least some interest in playing the pokies. Thanks for your time and responses.

RECORD INTERVIEWER'S ID

AUDITING (OFFICE ONLY)

Q73. Was the date and time of interview correct?

Yes 1
No 2

Q74. Was the interview recorded correctly?

Yes 1
No 2

Q75. Was the interviewer courteous?

Yes 1
No 2

Q76. AUDITOR'S ID

ENTER ID ..... _____

Appendix 8: SURVEY - Analysis Details

Additional Analysis Notes

Mixed effects models (MM) have several advantages over more traditional generalised linear models (GLM). An important advantage is that whereas GLM assumes that measurements for an individual over time are independent, MM incorporates the fact that they are much more likely correlated with one another, thus avoiding bias in standard errors (Shek and Ma 2011; Francis, et al. 1991; Hox 2002; Singer and Willett 2003; Barcikowski 1981; Graves, S., Jr. and Frohwerk 2009). So, for example, MM takes into account the fact that the amount of time someone spends gambling at Wave 1 is probably related to how much time she spends gambling at Wave 2.

IGC, a particular technique within MM, is generally perceived as the most advanced technique for accurately capturing both developmental changes over time as well as longitudinal pattern of treatment effects over time (Francis, et al. 1991; Hox 2002; Trautwein, et al. 2008; Willett, et al. 1998; Bryk and Raudenbush 1987; Duncan, et al. 1999; Meredith, W. and Tisak 1990). These issues are crucial for this research, given our interest in understanding the impact of gambling loyalty program membership on gambling behaviours. Just as people's loyalty program status (member or non-member) can change over time, so too can their gambling behaviours.

IGC analysis has several specific advantages over other techniques for analysing longitudinal data. These include the following: (1) IGC does not require that sample sizes be identical for each wave and it can handle missing data, meaning that it does not drop someone from the analysis because some of their data is missing (Shek and Ma 2011; Willett 1998); (2) IGC allows for the examination of both intra- and inter-individual differences in the growth parameters (Miner and Clarke-Stewart 2008). This means that we can examine differences between individuals in their initial status (e.g. how much money they spent gambling at the start of the study) and also in their rates of change (e.g. whether those who become loyalty program members increase the amount of money they spend gambling at a faster rate than those who do not join loyalty programs); (3) with three waves of data, IGC provides more precise estimates than is possible with other more traditional methods (Willett 1998; Speer, D.C. and Greenbaum 1995). This means we can be more certain of the results we get with IGC than with other statistical approaches; (4) other factors, such as gender, age, income, PGSI score and gambling frequency, which might also predict outcome variables such as gambling expenditure, can be added to the models so that the impact of loyalty program membership alone can be identified (Bryk and Raudenbush 1992); (5) IGC allows discrete predictors (e.g. LP member or not) as well as time-variant predictors (e.g. not a LP member at wave one, but a LP member at waves two and three) (Bryk and Raudenbush 1992); (6) IGC is more powerful than other methods for identifying true change effects over time (Kowalchuk, et al. 2004; Bono, et al. 2007).

There are two levels in IGC models. The Level 1 model estimates the average within- person initial status and rate of change over time. No predictors are included in this model. In other words, a Level 1 model might estimate the average gambling expenditure across all survey respondents at wave one and the rate at which this amount changes over waves two and three. The Level 2 model, which is what we are ultimately interested in, captures whether the rate of change varies across individual in a systematic way – such as whether being a loyalty program member or not results in their spending more or less on gambling (Shek and Ma 2011).

Initial analyses were performed using IBM SPSS 22.0 statistical software. Mixed effects modelling was performed using Stata 12.1.

Testing for multicolinearity

The independent variables included in the models were tested for multicolinearity. All non-dichotomous variables were mean-centred. As can be seen in the table, below, there are no Tolerance value of less than 0.10 or VIF values greater than 10. We therefore conclude that there are no major problems with multicolinearity (Kutner et al, 2005) and so include all of the predictor variables in the models.

Table A1: Test for multicolinearity – LPM_Status models

Variable	Colinearity Statistics	
	Tolerance	VIF
Gender	.822	1.217
Age	.608	1.644
Main activity	.534	1.872
HH income	.448	2.234
Personal income	.461	2.169
PGSI score	.789	1.267
Gambling frequency	.772	1.295
LPM status	.914	1.094
Time	.185	5.409
Gender x Time	.322	3.105
Age x Time	.616	1.622
Main activity x Time	.416	2.405
HH income x Time	.448	2.234
Personal income x Time	.458	2.182
PGSI score x Time	.769	1.301
Gambling frequency x Time	.735	1.361
LPM status x Time	.424	2.357

Table A2: Test for multicolinearity – HSLP models

Variable	Colinearity Statistics	
	Tolerance	VIF
Gender	.825	1.211
Age	.572	1.747
Main activity	.467	2.139
HH income	.383	2.609
Personal income	.431	2.319
PGSI score	.813	1.230
Gambling frequency	.856	1.169
High success LP (HSLP)	.905	1.105
Time	.334	2.991
Gender x Time	.593	1.686
Age x Time	.358	2.794
Main activity x Time	.387	2.585
HH income x Time	.424	2.361
Personal income x Time	.780	1.282
PGSI score x Time	.752	1.331
Gambling frequency x Time	.914	1.094
HSLP x Time	.212	4.707

Response to time: linear or non-linear

For each model, TIME was investigated as both a continuous and categorical variable with resulting AICs compared. In most cases there was a very slight improvement in the AIC (i.e. smaller) with TIME as a categorical variable. However, the difference was negligible. Therefore, for the sake of simplicity and easy of interpretation we have included TIME as a continuous variable in all of the models.

Appendix 9: SURVEY – Tables of Results

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.1. In the past 12 months, have you spent any money on playing the pokies, also known as electronic gaming machines, at a casino, club, pub or hotel?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.1. In the past 12 months, have you spent any money on playing the pokies, also known as electronic gaming machines, at a casino, club, pub or hotel?	Yes	2213	1207	524	362	321	1006	449	299	258
		99 9%	99.8%	100 0%	100.0%	99.1%	100.0%	100 0%	100.0%	100 0%
	No	3	3	0	0	3	0	0	0	0
		.1%	.2%	0 0%	0.0%	9%	0.0%	0 0%	0.0%	0 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.1.a) What about in the past 6 months? That would be since about November or December of last year?

			LPM	LPM	NON LPM	NON LPM
BASE: PLAYED POKIES N THE PAST 12 MONTHS		Total	Total	Wave 3	Total	Wave 3
Sample Size		579	321	321	258	258
Q.1 a) What about in the past 6 months? That would be since about November or December of last year?	Yes	496	291	291	205	205
		85.7%	90.7%	90.7%	79.5%	79 5%
	No	83	30	30	53	53
		14 3%	9.3%	9 3%	20.5%	20 5%
TOTAL		579	321	321	258	258
		100 0%	100.0%	100 0%	100.0%	100 0%

Q.2. And again in the past 12 months, have you spent any money on playing any other gambling activities?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.2. And again in the past 12 months, have you spent any money on playing any other gambling activities?	Yes	1357	820	362	262	196	537	259	162	116
		61 2%	67.8%	69.1%	72.4%	60 5%	53.4%	57.7%	54.2%	45 0%
	No	859	390	162	100	128	469	190	137	142
		38 8%	32.2%	30 9%	27.6%	39 5%	46.6%	42 3%	45.8%	55 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.2.a) And what about in the past 6 months?

			LPM	LPM	NON LPM	NON LPM
BASE: PLAYED OTHER GAMBLING ACTIVIT ES IN THE PAST 12 MONTHS		Total	Total	Wave 3	Total	Wave 3
Sample Size		312	196	196	116	116
Q.2 a) And what about in the past 6 months?	Yes	265	176	176	89	89
		84 9%	89.8%	89 8%	76.7%	76.7%
	No	47	20	20	27	27
		15.1%	10.2%	10 2%	23.3%	23 3%
TOTAL		312	196	196	116	116
		100 0%	100.0%	100 0%	100.0%	100 0%

Q.3. Have you ever spent money on playing the pokies or electronic gaming machines?

			LPM	LPM	NON LPM
BASE: HAVE NOT PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 3	Total
Sample Size		3	3	3	0
Q.3. Have you ever spent money on playing the pokies or electronic gaming machines?	Yes	2	2	2	0
		66.7%	66.7%	66.7%	0.0%
	No	1	1	1	0
		33 3%	33.3%	33 3%	0.0%
TOTAL		3	3	3	0
		100 0%	100.0%	100 0%	0.0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.4. Have you ever spent money on any of those other gambling activities?

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE NOT PLAYED OTHER GAMBLING GAMES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		859	390	162	100	128	469	190	137	142
Q.4. Have you ever spent money on any of those other gambling activities?	Yes	471	227	95	51	81	244	99	73	72
		54 8%	58.2%	58 6%	51.0%	63 3%	52.0%	52.1%	53.3%	50.7%
	No	388	163	67	49	47	225	91	64	70
		45 2%	41.8%	41.4%	49.0%	36.7%	48.0%	47 9%	46.7%	49 3%
TOTAL		859	390	162	100	128	469	190	137	142
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.6.a) Why have you not gambled in the past 12 months?

			LPM	LPM	NON LPM
BASE: HAVE NOT GAMBLED IN PAST 12 MONTHS		Total	Total	Wave 3	Total
Sample Size		1	1	1	0
Q6A MULTI	Can't afford it / no money	1	1	1	0
		100 0%	100.0%	100 0%	0.0%
TOTAL		1	1	1	0
		100 0%	100.0%	100 0%	0.0%

Q.6.b) Why have you never gambled?

			LPM	LPM	NON LPM
BASE: HAVE NEVER GAMBLED		Total	Total	Wave 3	Total
Sample Size		1	1	1	0
Q6B MULTI	Waste of money	1	1	1	0
		100 0%	100.0%	100 0%	0.0%
	Seen gambling harm people / gambling is harmful	1	1	1	0
		100 0%	100.0%	100 0%	0.0%
	Don't believe in it / don't like it / personal reasons	1	1	1	0
		100 0%	100.0%	100 0%	0.0%
TOTAL		1	1	1	0
		100 0%	100.0%	100 0%	0.0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.6.a) Why have you not gambled in the past 6 months?

BASE: HAVE NOT GAMBLED IN PAST 6 MONTHS		Total	LPM Total	LPM Wave 3	NON LPM Total	NON LPM Wave 3
Sample Size		52	15	15	37	37
Q6C MULTI	No reason in particular	6	2	2	4	4
		11 5%	13.3%	13 3%	10.8%	10 8%
	Waste of money	10	0	0	10	10
		19 2%	0.0%	0 0%	27.0%	27 0%
	Waste of time	3	0	0	3	3
		5 8%	0.0%	0 0%	8.1%	8.1%
	Boring / no interest	17	4	4	13	13
		32.7%	26.7%	26.7%	35.1%	35.1%
	Can't afford it / no money	6	3	3	3	3
		11 5%	20.0%	20 0%	8.1%	8.1%
	Past difficulties / issues with gambling	1	0	0	1	1
		1 9%	0.0%	0 0%	2.7%	2.7%
	Friends don't gamble	3	1	1	2	2
		5 8%	6.7%	6.7%	5.4%	5.4%
	Seen gambling harm people / gambling is harmful	3	0	0	3	3
		5 8%	0.0%	0 0%	8.1%	8.1%
	Don't believe in it / don't like it / personal reasons	2	1	1	1	1
		3 8%	6.7%	6.7%	2.7%	2.7%
	Have kids / family reasons	3	1	1	2	2
		5 8%	6.7%	6.7%	5.4%	5.4%
	Illness / can't travel	2	0	0	2	2
		3 8%	0.0%	0 0%	5.4%	5.4%
	Too busy/ don't go out as much/ too places where gambling is available	7	4	4	3	3
		13 5%	26.7%	26.7%	8.1%	8.1%
	Trying to save money/ spend money on other things	1	0	0	1	1
		1 9%	0.0%	0 0%	2.7%	2.7%
	Other (Specify)	4	1	1	3	3
		7.7%	6.7%	6.7%	8.1%	8.1%
TOTAL		52	15	15	37	37
		100 0%	100.0%	100 0%	100.0%	100 0%

Q.7. How likely are you to play the pokies in the future, would you say you will ?

BASE: ALL RESPONDENTS		Total	LPM Total	LPM Wave 1	LPM Wave 2	LPM Wave 3	NON LPM Total	NON LPM Wave 1	NON LPM Wave 2	NON LPM Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.7. How likely are you to play the pokies in the future, would you say you will ?	DEFINITELY play the pokies in the future	1002	680	315	195	170	322	158	89	75
		45 2%	56.2%	60.1%	53.9%	52 5%	32.0%	35 2%	29.8%	29.1%
	PROBABLY play the pokies in the future	942	447	188	140	119	495	211	150	134
		42 5%	36.9%	35 9%	38.7%	36.7%	49.2%	47 0%	50.2%	51 9%
	(Maybe or maybe not)	41	8	1	2	5	33	17	6	10
		1 9%	.7%	2%	.6%	1 5%	3.3%	3 8%	2.0%	3 9%
	Probably NOT play the pokies in the future	203	64	18	23	23	139	56	50	33
		9 2%	5.3%	3.4%	6.4%	7.1%	13.8%	12 5%	16.7%	12 8%
	Definitely NOT play the pokies in the future	26	10	2	2	6	16	7	4	5
		1 2%	.8%	.4%	.6%	1 9%	1.6%	1 6%	1.3%	1 9%
	(Don't know)	2	1	0	0	1	1	0	0	1
		.1%	.1%	0 0%	0.0%	3%	.1%	0 0%	0.0%	.4%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.8. How likely are you to engage in any other form of gambling in the future, would you say you will ?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.8. How likely are you to engage in any other form of gambling in the future, would you say you will ?	DEFINITELY gamble in the future	761	509	256	141	112	252	141	58	53
		34 3%	42.1%	48 9%	39.0%	34 6%	25.0%	31.4%	19.4%	20 5%
	PROBABLY gamble in the future	767	393	172	119	102	374	156	109	109
		34 6%	32.5%	32 8%	32.9%	31 5%	37.2%	34.7%	36.5%	42 2%
	(Maybe or maybe not)	50	26	10	2	14	24	15	3	6
		2 3%	2.1%	1 9%	.6%	4 3%	2.4%	3 3%	1.0%	2 3%
	Probably NOT gamble in the future	420	186	51	69	66	234	84	96	54
		19 0%	15.4%	9.7%	19.1%	20.4%	23.3%	18.7%	32.1%	20 9%
	Definitely NOT gamble in the future	215	95	35	31	29	120	52	33	35
		9.7%	7.9%	6.7%	8.6%	9 0%	11.9%	11 6%	11.0%	13 6%
	(Don't know)	3	1	0	0	1	2	1	0	1
		.1%	.1%	0 0%	0.0%	3%	.2%	2%	0.0%	.4%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.9. Thinking about all of your gambling over the past 12 months How often have you usually gambled in the last 12 months?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES OR OTHER GAMBL NG GAMES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.9. Thinking about all of your gambling over the past 12 months How often have you usually gambled in the last 12 months?	Once or twice a year	323	76	25	23	28	247	104	71	72
		14 6%	6.3%	4 8%	6.4%	8.7%	24.6%	23 2%	23.7%	27 9%
	Every 2 - 3 months	486	206	83	67	56	280	118	90	72
		22 0%	17.1%	15 8%	18.5%	17.4%	27.8%	26 3%	30.1%	27 9%
	Monthly	372	218	92	62	64	154	62	51	41
		16 8%	18.0%	17 6%	17.1%	19 9%	15.3%	13 8%	17.1%	15 9%
	Fortnightly	349	223	99	72	52	126	69	25	32
		15 8%	18.5%	18 9%	19.9%	16.1%	12.5%	15.4%	8.4%	12.4%
	Weekly	386	259	120	70	69	127	57	41	29
		17.4%	21.4%	22 9%	19.3%	21.4%	12.6%	12.7%	13.7%	11 2%
	More than once a week	294	223	104	67	52	71	38	21	12
		13 3%	18.5%	19 8%	18.5%	16.1%	7.1%	8 5%	7.0%	4.7%
	(Don't know)	3	2	0	1	1	1	1	0	0
		.1%	.2%	0 0%	.3%	3%	.1%	2%	0.0%	0 0%
	(Refused)	1	1	1	0	0	0	0	0	0
		0%	.1%	2%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.10. And when you gamble, about how long do you usually spend gambling?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES OR OTHER GAMBL NG GAMES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		1862	1046	362	362	322	816	259	299	258
Q.10. And when you gamble, about how long do you usually spend gambling?	Less than half an hour	277	106	23	32	51	171	42	48	81
		14 9%	10.1%	6.4%	8.8%	15 8%	21.0%	16 2%	16.1%	31.4%
	Half an hour to an hour	837	444	151	156	137	393	120	163	110
		45 0%	42.4%	41.7%	43.1%	42 5%	48.2%	46 3%	54.5%	42 6%
	One to two hours	369	245	91	86	68	124	46	44	34
		19 8%	23.4%	25.1%	23.8%	21.1%	15.2%	17 8%	14.7%	13 2%
	Two to five hours	272	187	78	63	46	85	39	29	17
		14 6%	17.9%	21 5%	17.4%	14 3%	10.4%	15.1%	9.7%	6 6%
	More than five hours	58	33	17	14	2	25	10	10	5
		3.1%	3.2%	4.7%	3.9%	6%	3.1%	3 9%	3.3%	1 9%
	(Don't know)	49	31	2	11	18	18	2	5	11
		2 6%	3.0%	6%	3.0%	5 6%	2.2%	8%	1.7%	4 3%
TOTAL		1862	1046	362	362	322	816	259	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.10.b) And about how long do you usually stay at the venue, including both gambling and non-gambling activities?

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			LPM	LPM		NON LPM	NON LPM	
BASE: PLAYED POKIES OR OTHER GAMBL NG GAMES N PAST 12 MONTHS		Total	Total	Wave 2	Wave 3	Total	Wave 2	Wave 3
Sample Size		1241	684	362	322	557	299	258
Q.10.b) And about how long do you usually stay at the venue, including both gambling and non-gambling activities?	Less than half an hour	31	14	5	9	17	5	12
		2 5%	2.0%	1.4%	2.8%	3.1%	1.7%	4.7%
	Half an hour to an hour	171	71	37	34	100	60	40
		13 8%	10.4%	10 2%	10.6%	18 0%	20.1%	15 5%
	One to two hours	431	219	115	104	212	108	104
		34.7%	32.0%	31 8%	32.3%	38.1%	36.1%	40 3%
	Two to five hours	479	298	162	136	181	100	81
		38 6%	43.6%	44 8%	42.2%	32 5%	33.4%	31.4%
	More than five hours	66	50	28	22	16	9	7
		5 3%	7.3%	7.7%	6.8%	2 9%	3.0%	2.7%
	Missing - not asked	18	9	9	0	9	9	0
		1 5%	1.3%	2 5%	0.0%	1 6%	3.0%	0 0%
	(Don't know)	45	23	6	17	22	8	14
		3 6%	3.4%	1.7%	5.3%	3 9%	2.7%	5.4%
TOTAL		1241	684	362	322	557	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.11. Thinking about the last time you gambled, approximately how much money did you bet gambling on that occasion?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES OR OTHER GAMBL NG GAMES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.11. Thinking about the last time you gambled, approximately how much money did you bet gambling on that occasion?	$1 - $10	469	183	72	53	58	286	127	76	83
		21 2%	15.1%	13.7%	14.6%	18 0%	28.4%	28 3%	25.4%	32 2%
	$11 - $20	462	235	98	72	65	227	107	67	53
		20 9%	19.5%	18.7%	19.9%	20 2%	22.6%	23 8%	22.4%	20 5%
	$21 - $50	607	334	145	98	91	273	117	86	70
		27.4%	27.6%	27.7%	27.1%	28 3%	27.1%	26.1%	28.8%	27.1%
	$51 - $100	297	202	94	65	43	95	44	24	27
		13.4%	16.7%	17 9%	18.0%	13.4%	9.4%	9 8%	8.0%	10 5%
	$101 - $200	200	139	62	39	38	61	25	27	9
		9 0%	11.5%	11 8%	10.8%	11 8%	6.1%	5 6%	9.0%	3 5%
	More than $200	169	108	50	34	24	61	26	19	16
		7 6%	8.9%	9 5%	9.4%	7 5%	6.1%	5 8%	6.4%	6 2%
	(Don't know)	4	3	1	0	2	1	1	0	0
		2%	.2%	2%	0.0%	6%	.1%	2%	0.0%	0 0%
	(Refused)	6	4	2	1	1	2	2	0	0
		3%	.3%	.4%	.3%	3%	.2%	.4%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.12. How often have you usually played the pokies in the last 12 months?

			LPM	LPM			NON LPM	NON LPM	
BASE: PLAYED POKIES N LAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.12. How often have you usually played the pokies in the last 12 months?	Once or twice a year	458	119	46	32	41	339	147	101	91
		20.7%	9.9%	8 8%	8.8%	12 8%	33.7%	32.7%	33.8%	35 3%
	Every 2 - 3 months	568	276	103	98	75	292	131	92	69
		25.7%	22.9%	19.7%	27.1%	23.4%	29.0%	29 2%	30.8%	26.7%
	Monthly	366	243	109	71	63	123	48	38	37
		16 5%	20.1%	20 8%	19.6%	19 6%	12.2%	10.7%	12.7%	14 3%
	Fortnightly	343	225	106	65	54	118	60	26	32
		15 5%	18.6%	20 2%	18.0%	16 8%	11.7%	13.4%	8.7%	12.4%
	Weekly	279	198	95	52	51	81	32	27	22
		12 6%	16.4%	18.1%	14.4%	15 9%	8.1%	7.1%	9.0%	8 5%
	More than once a week	192	140	65	43	32	52	30	15	7
		8.7%	11.6%	12.4%	11.9%	10 0%	5.2%	6.7%	5.0%	2.7%
	(Don't know)	6	5	0	1	4	1	1	0	0
		3%	.4%	0 0%	.3%	1 2%	.1%	2%	0.0%	0 0%
	(Refused)	1	1	0	0	1	0	0	0	0
		0%	.1%	0 0%	0.0%	3%	0.0%	0 0%	0.0%	0 0%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.13. Have you played the pokies ?

			LPM	LPM			NON LPM	NON LPM	
BASE: PLAYED POKIES N LAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.13. Have you played the pokies ?	Within the last month	1281	815	375	238	202	466	219	126	121
		57 9%	67.5%	71 6%	65.7%	62 9%	46.3%	48 8%	42.1%	46 9%
	1 to 2 months ago	348	178	81	50	47	170	83	52	35
		15.7%	14.7%	15 5%	13.8%	14 6%	16.9%	18 5%	17.4%	13 6%
	2 to 3 months ago	222	95	39	34	22	127	62	40	25
		10 0%	7.9%	7.4%	9.4%	6 9%	12.6%	13 8%	13.4%	9.7%
	3 to 6 months ago	186	67	15	25	27	119	46	40	33
		8.4%	5.6%	2 9%	6.9%	8.4%	11.8%	10 2%	13.4%	12 8%
	6 to 12 months ago	173	52	14	15	23	121	37	41	43
		7 8%	4.3%	2.7%	4.1%	7 2%	12.0%	8 2%	13.7%	16.7%
	(Don't know)	2	0	0	0	0	2	1	0	1
		.1%	0.0%	0 0%	0.0%	0 0%	.2%	2%	0.0%	.4%
	(Refuse)	1	0	0	0	0	1	1	0	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.13.b) And when you play the pokies, about how long do you usually spend gambling?

			LPM	LPM		NON LPM	NON LPM	
BASE: PLAYED POKIES N LAST 12 MONTHS		Total	Total	Wave 2	Wave 3	Total	Wave 2	Wave 3
Sample Size		1240	683	362	321	557	299	258
Q.13.b) And when you play the pokies, about how long do you usually spend gambling	Less than half an hour	240	95	40	55	145	61	84
		19.4%	13.9%	11 0%	17.1%	26 0%	20.4%	32 6%
	Half an hour to an hour	598	308	161	147	290	162	128
		48 2%	45.1%	44 5%	45.8%	52.1%	54.2%	49 6%
	One to two hours	217	159	86	73	58	31	27
		17 5%	23.3%	23 8%	22.7%	10.4%	10.4%	10 5%
	Two to five hours	118	84	49	35	34	23	11
		9 5%	12.3%	13 5%	10.9%	6.1%	7.7%	4 3%
	More than five hours	9	6	4	2	3	0	3
		.7%	.9%	1.1%	.6%	5%	0.0%	1 2%
	Missing - not asked	32	15	15	0	17	17	0
		2 6%	2.2%	4.1%	0.0%	3.1%	5.7%	0 0%
	(Don't know)	26	16	7	9	10	5	5
		2.1%	2.3%	1 9%	2.8%	1 8%	1.7%	1 9%
TOTAL		1240	683	362	321	557	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.14. And about how long do you usually stay at the venue, including both gambling and non-gambling activities?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N LAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.14. And about how long do you usually stay at the venue, including both gambling and non-gambling activities?	Less than half an hour	67	30	22	4	4	37	26	4	7
		3 0%	2.5%	4 2%	1.1%	1 2%	3.7%	5 8%	1.3%	2.7%
	Half an hour to an hour	492	222	139	43	40	270	149	70	51
		22 2%	18.4%	26 5%	11.9%	12 5%	26.8%	33 2%	23.4%	19 8%
	One to two hours	799	415	169	136	110	384	160	121	103
		36.1%	34.4%	32 3%	37.6%	34 3%	38.2%	35 6%	40.5%	39 9%
	Two to five hours	749	467	177	151	139	282	100	94	88
		33 8%	38.7%	33 8%	41.7%	43 3%	28.0%	22 3%	31.4%	34.1%
	More than five hours	80	60	16	24	20	20	11	5	4
		3 6%	5.0%	3.1%	6.6%	6 2%	2.0%	2.4%	1.7%	1 6%
	(Don't know)	26	13	1	4	8	13	3	5	5
		1 2%	1.1%	2%	1.1%	2 5%	1.3%	.7%	1.7%	1 9%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.15. Thinking about the last time you played the pokies, approximately how much money did you bet playing the pokies on that occasion?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N LAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.15. Thinking about the last time you played the pokies, approximately how much money did you bet playing the pokies on that occasion?	$1 - $10	524	210	93	60	57	314	139	86	89
		23.7%	17.4%	17.7%	16.6%	17 8%	31.2%	31 0%	28.8%	34 5%
	$11 - $20	501	242	107	75	60	259	120	81	58
		22 6%	20.0%	20.4%	20.7%	18.7%	25.7%	26.7%	27.1%	22 5%
	$21 - $50	558	317	116	100	101	241	99	75	67
		25 2%	26.3%	22.1%	27.6%	31 5%	24.0%	22 0%	25.1%	26 0%
	$51 - $100	300	210	110	54	46	90	46	19	25
		13 6%	17.4%	21 0%	14.9%	14 3%	8.9%	10 2%	6.4%	9.7%
	$101 - $200	171	128	54	37	37	43	18	19	6
		7.7%	10.6%	10 3%	10.2%	11 5%	4.3%	4 0%	6.4%	2 3%
	More than $200	148	92	40	34	18	56	25	18	13
		6.7%	7.6%	7 6%	9.4%	5 6%	5.6%	5 6%	6.0%	5 0%
	(Don't know)	5	3	1	1	1	2	1	1	0
		2%	.2%	2%	.3%	3%	.2%	2%	.3%	0 0%
	(Refused)	6	5	3	1	1	1	1	0	0
		3%	.4%	6%	.3%	3%	.1%	2%	0.0%	0 0%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.16. In the past 12 months, at how many pubs or hotels have you played the pokies?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.16. In the past 12 months, at how many pubs or hotels have you played the pokies?	None	776	463	178	147	138	313	145	90	78
		35.1%	38.4%	34 0%	40.6%	43 0%	31.1%	32 3%	30.1%	30 2%
	One pub/hotel venue	486	202	94	58	50	284	121	84	79
		22 0%	16.7%	17 9%	16.0%	15 6%	28.2%	26 9%	28.1%	30 6%
	Two pub/hotel venues	325	161	65	49	47	164	64	54	46
		14.7%	13.3%	12.4%	13.5%	14 6%	16.3%	14 3%	18.1%	17 8%
	Three pub/hotel venues	243	137	61	40	36	106	46	30	30
		11 0%	11.4%	11 6%	11.0%	11 2%	10.5%	10 2%	10.0%	11 6%
	Four pub/hotel venues	97	54	26	17	11	43	23	8	12
		4.4%	4.5%	5 0%	4.7%	3.4%	4.3%	5.1%	2.7%	4.7%
	Five pub/hotel venues	77	53	26	16	11	24	12	9	3
		3 5%	4.4%	5 0%	4.4%	3.4%	2.4%	2.7%	3.0%	1 2%
	Six or more pub/hotel venues	199	130	73	32	25	69	38	22	9
		9 0%	10.8%	13 9%	8.8%	7 8%	6.9%	8 5%	7.4%	3 5%
	(Don't know)	10	7	1	3	3	3	0	2	1
		5%	.6%	2%	.8%	9%	.3%	0 0%	.7%	.4%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.16. In the past 12 months, at how many clubs have you played the pokies?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.16. In the past 12 months, at how many clubs have you played the pokies?	None	769	311	128	99	84	458	203	146	109
		34.7%	25.8%	24.4%	27.3%	26 2%	45.5%	45 2%	48.8%	42 2%
	One club venue	709	374	151	110	113	335	152	99	84
		32 0%	31.0%	28 8%	30.4%	35 2%	33.3%	33 9%	33.1%	32 6%
	Two club venues	322	208	90	62	56	114	45	31	38
		14 6%	17.2%	17 2%	17.1%	17.4%	11.3%	10 0%	10.4%	14.7%
	Three club venues	158	121	58	36	27	37	14	8	15
		7.1%	10.0%	11.1%	9.9%	8.4%	3.7%	3.1%	2.7%	5 8%
	Four club venues	93	65	30	17	18	28	16	7	5
		4 2%	5.4%	5.7%	4.7%	5 6%	2.8%	3 6%	2.3%	1 9%
	Five club venues	47	35	19	10	6	12	7	2	3
		2.1%	2.9%	3 6%	2.8%	1 9%	1.2%	1 6%	.7%	1 2%
	Six or more club venues	113	92	48	28	16	21	12	6	3
		5.1%	7.6%	9 2%	7.7%	5 0%	2.1%	2.7%	2.0%	1 2%
	(Don't know)	2	1	0	0	1	1	0	0	1
		.1%	.1%	0 0%	0.0%	3%	.1%	0 0%	0.0%	.4%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.16. In the past 12 months, at how many casinos have you played the pokies?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.16. In the past 12 months, at how many casinos have you played the pokies?	None	1418	635	258	202	175	783	329	239	215
		64.1%	52.6%	49 2%	55.8%	54 5%	77.8%	73 3%	79.9%	83 3%
	One casino venue	674	476	213	134	129	198	105	52	41
		30 5%	39.4%	40 6%	37.0%	40 2%	19.7%	23.4%	17.4%	15 9%
	Two casino venues	81	63	31	17	15	18	10	6	2
		3.7%	5.2%	5 9%	4.7%	4.7%	1.8%	2 2%	2.0%	8%
	Three or more casino venues	37	31	22	7	2	6	5	1	0
		1.7%	2.6%	4 2%	1.9%	6%	.6%	1.1%	.3%	0 0%
	(Refused)	3	2	0	2	0	1	0	1	0
		.1%	.2%	0 0%	.6%	0 0%	.1%	0 0%	.3%	0 0%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.17. Do you belong to loyalty programs at any of those pubs or hotels?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS AT A PUB/HOTEL VENUE		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		1437	744	346	215	183	693	304	209	180
Q.17. Do you belong to loyalty programs at any of those pubs or hotels?	Not a member of a loyalty program at a pub/hotel venue	1090	397	186	114	97	693	304	209	180
		75 9%	53.4%	53 8%	53.0%	53 0%	100.0%	100 0%	100.0%	100 0%
	Member at one pub/hotel venue	239	239	107	69	63	0	0	0	0
		16 6%	32.1%	30 9%	32.1%	34.4%	0.0%	0 0%	0.0%	0 0%
	Member at two pub/hotel venues	67	67	31	23	13	0	0	0	0
		4.7%	9.0%	9 0%	10.7%	7.1%	0.0%	0 0%	0.0%	0 0%
	Member at three or more pub/hotel venues	41	41	22	9	10	0	0	0	0
		2 9%	5.5%	6.4%	4.2%	5 5%	0.0%	0 0%	0.0%	0 0%
TOTAL		1437	744	346	215	183	693	304	209	180
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.17. Do you belong to loyalty programs at any of those clubs?

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS AT A CLUB VENUE		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		1444	896	396	263	237	548	246	153	149
Q.17. Do you belong to loyalty programs at any of those clubs?	Not a member of a loyalty program at a club venue	711	163	84	40	39	548	246	153	149
		49 2%	18.2%	21 2%	15.2%	16 5%	100.0%	100 0%	100.0%	100 0%
	Member at one club venue	493	493	200	145	148	0	0	0	0
		34.1%	55.0%	50 5%	55.1%	62.4%	0.0%	0 0%	0.0%	0 0%
	Member at two club venues	143	143	64	46	33	0	0	0	0
		9 9%	16.0%	16 2%	17.5%	13 9%	0.0%	0 0%	0.0%	0 0%
	Member at three or more club venues	97	97	48	32	17	0	0	0	0
		6.7%	10.8%	12.1%	12.2%	7 2%	0.0%	0 0%	0.0%	0 0%
TOTAL		1444	896	396	263	237	548	246	153	149
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.17. Do you belong to loyalty programs at any of those casinos?

			LPM	LPM			NON LPM	NON LPM	
BASE: PLAYED POKIES N PAST 12 MONTHS AT A CAS NO VENUE		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		795	572	266	160	146	223	120	60	43
Q.17. Do you belong to loyalty programs at any of those casinos?	Not a member of a loyalty program at a casino venue	316	93	44	24	25	223	120	60	43
		39.7%	16.3%	16 5%	15.0%	17.1%	100.0%	100 0%	100.0%	100 0%
	Member at one casino venue	460	460	214	129	117	0	0	0	0
		57 9%	80.4%	80 5%	80.6%	80.1%	0.0%	0 0%	0.0%	0 0%
	Member at two or more casino venues	18	18	8	6	4	0	0	0	0
		2 3%	3.1%	3 0%	3.8%	2.7%	0.0%	0 0%	0.0%	0 0%
	(Refused)	1	1	0	1	0	0	0	0	0
		.1%	.2%	0 0%	.6%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		795	572	266	160	146	223	120	60	43
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.19. I'd now like you to think about the venue where you use your loyalty program membership the most to play the pokies. Is this [ANSWER TO Q.18]?

			LPM	LPM			NON LPM	NON LPM
BASE: PLAYED POKIES & LPM AT MORE THAN ONE VENUE		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 2
Sample Size		480	479	222	147	110	1	1
Q.19. I'd now like you to think about the venue where you use your loyalty program membership the most to play the pokies. Is this [ANSWER TO Q.18]?	Yes	414	414	189	128	97	0	0
		86 3%	86.4%	85.1%	87.1%	88 2%	0.0%	0 0%
	No	63	63	33	18	12	0	0
		13.1%	13.2%	14 9%	12.2%	10 9%	0.0%	0 0%
	(Don't know)	1	1	0	0	1	0	0
		2%	.2%	0 0%	0.0%	9%	0.0%	0 0%
	(Refused)	2	1	0	1	0	1	1
		.4%	.2%	0 0%	.7%	0 0%	100.0%	100 0%
TOTAL		480	479	222	147	110	1	1
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.20. Does [ANSWER TO Q.18] have a loyalty program?

			LPM	LPM			NON LPM
BASE: VENUE PLAY POKIES MOST NOT SAME AS WHERE USE LPM MOST		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		63	63	33	18	12	0
Q.20. Does [ANSWER TO Q.18] have a loyalty program?	Yes	27	27	14	7	6	0
		42 9%	42.9%	42.4%	38.9%	50 0%	0.0%
	No	19	19	9	7	3	0
		30 2%	30.2%	27 3%	38.9%	25 0%	0.0%
	(Don't know)	17	17	10	4	3	0
		27 0%	27.0%	30 3%	22.2%	25 0%	0.0%
TOTAL		63	63	33	18	12	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.21. Thinking about the venue where you use your loyalty program the most in which suburb is this venue located? – collapsed to metro/non-metro area

			LPM	LPM			NON LPM	NON LPM	
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2
Sample Size		1955	1207	524	362	321	748	449	299
Q.21. Loyalty Program Venue Area	Metro	917	627	240	196	191	290	166	124
		46 9%	51.9%	45 8%	54.1%	59 5%	38.8%	37 0%	41.5%
	Non metro	740	447	177	140	130	293	157	136
		37 9%	37.0%	33 8%	38.7%	40 5%	39.2%	35 0%	45.5%
	(Don't know)	262	119	94	25	0	143	105	38
		13.4%	9.9%	17 9%	6.9%	0 0%	19.1%	23.4%	12.7%
	(Refused)	36	14	13	1	0	22	21	1
		1 8%	1.2%	2 5%	.3%	0 0%	2.9%	4.7%	.3%
TOTAL		1955	1207	524	362	321	748	449	299
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%

Q.22. Thinking about the venue where you use your loyalty program the most in which state is this venue located?

			LPM	LPM			NON LPM	NON LPM		
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.22. And in which state is that?	Victoria	852	442	201	132	109	410	185	126	99
		38 5%	36.6%	38.4%	36.5%	34 0%	40.8%	41 2%	42.1%	38.4%
	New South Wales	696	412	182	124	106	284	124	86	74
		31 5%	34.1%	34.7%	34.3%	33 0%	28.2%	27 6%	28.8%	28.7%
	Queensland	330	192	78	58	56	138	67	34	37
		14 9%	15.9%	14 9%	16.0%	17.4%	13.7%	14 9%	11.4%	14 3%
	South Australia	174	71	29	21	21	103	41	31	31
		7 9%	5.9%	5 5%	5.8%	6 5%	10.2%	9.1%	10.4%	12 0%
	Western Australia	32	28	9	10	9	4	3	0	1
		1.4%	2.3%	1.7%	2.8%	2 8%	.4%	.7%	0.0%	.4%
	Tasmania	79	44	19	12	13	35	14	14	7
		3 6%	3.6%	3 6%	3.3%	4 0%	3.5%	3.1%	4.7%	2.7%
	Northern Territory	17	7	2	2	3	10	5	2	3
		8%	.6%	.4%	.6%	9%	1.0%	1.1%	.7%	1 2%
	ACT	18	11	4	3	4	7	3	3	1
		8%	.9%	8%	.8%	1 2%	.7%	.7%	1.0%	.4%
	(Don't know)	11	0	0	0	0	11	4	3	4
		5%	0.0%	0 0%	0.0%	0 0%	1.1%	9%	1.0%	1 6%
	(Refused)	4	0	0	0	0	4	3	0	1
		2%	0.0%	0 0%	0.0%	0 0%	.4%	.7%	0.0%	.4%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.23. Is there any particular reason that you are not a member of a loyalty program?

			LPM	NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS BUT NOT LPM		Total	Total	Total	Wave 1	Wave 2	Wave 3
Sample Size		1006	0	1006	449	299	258
Q23 MULTI	No reason in particular	254	0	254	136	62	56
		25 2%	0.0%	25 2%	30.3%	20.7%	21.7%
	Don't know if it has one	58	0	58	29	18	11
		5 8%	0.0%	5 8%	6.5%	6 0%	4.3%
	Doesn't have one	35	0	35	15	6	14
		3 5%	0.0%	3 5%	3.3%	2 0%	5.4%
	Wouldn't use it	160	0	160	70	40	50
		15 9%	0.0%	15 9%	15.6%	13.4%	19.4%
	Don't go enough to make it worthwhile	422	0	422	169	135	118
		41 9%	0.0%	41 9%	37.6%	45 2%	45.7%
	Too confusing or hard to understand how it works	7	0	7	2	3	2
		.7%	0.0%	.7%	.4%	1 0%	.8%
	Not good enough rewards / no interest in rewards	32	0	32	7	14	11
		3 2%	0.0%	3 2%	1.6%	4.7%	4.3%
	Too hard to accumulate points	6	0	6	1	4	1
		6%	0.0%	6%	.2%	1 3%	.4%
	Don't believe/trust in loyalty programs	33	0	33	9	8	16
		3 3%	0.0%	3 3%	2.0%	2.7%	6.2%
	Costs to sign up / didn't want to pay to sign up	1	0	1	0	0	1
		.1%	0.0%	.1%	0.0%	0 0%	.4%
	Concerned about what they would do with this information	3	0	3	3	0	0
		3%	0.0%	3%	.7%	0 0%	0.0%
	Worried it would encourage me to gamble more	45	0	45	17	17	11
		4 5%	0.0%	4 5%	3.8%	5.7%	4.3%
	Other (Specify)	60	0	60	33	20	7
		6 0%	0.0%	6 0%	7.3%	6.7%	2.7%
	(Don't know)	4	0	4	1	2	1
		.4%	0.0%	.4%	.2%	.7%	.4%
TOTAL		1006	0	1006	449	299	258
		100 0%	0.0%	100 0%	100.0%	100 0%	100.0%

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Q.24. How long have you been a member of this program?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.24. How long have you been a member of this program?	Less than 12 mths	181	181	84	58	39	0
		15 0%	15.0%	16 0%	16.0%	12.1%	0.0%
	12 mths to less than 2 yrs	157	157	67	44	46	0
		13 0%	13.0%	12 8%	12.2%	14 3%	0.0%
	Between 2 and 5 yrs	328	328	140	92	96	0
		27 2%	27.2%	26.7%	25.4%	29 9%	0.0%
	Between 5 and 10 yrs	301	301	140	93	68	0
		24 9%	24.9%	26.7%	25.7%	21 2%	0.0%
	10 yrs or more	202	202	83	61	58	0
		16.7%	16.7%	15 8%	16.9%	18.1%	0.0%
	(Don't know)	36	36	10	12	14	0
		3 0%	3.0%	1 9%	3.3%	4.4%	0.0%
	(Refused)	2	2	0	2	0	0
		2%	.2%	0 0%	.6%	0 0%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.25. How did you find out about this loyalty program?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q25 MULTI	Sign / advertising at the venue	381	381	165	117	99	0
		31 6%	31.6%	31 5%	32.3%	30 8%	0.0%
	Electronic kiosk at the venue	9	9	4	4	1	0
		.7%	.7%	8%	1.1%	3%	0.0%
	Website	4	4	2	1	1	0
		3%	.3%	.4%	.3%	3%	0.0%
	Friends	124	124	54	32	38	0
		10 3%	10.3%	10 3%	8.8%	11 8%	0.0%
	Family	60	60	30	17	13	0
		5 0%	5.0%	5.7%	4.7%	4 0%	0.0%
	Communication (email, mail, phone, etc.)	37	37	12	8	17	0
		3.1%	3.1%	2 3%	2.2%	5 3%	0.0%
	Venue staff	318	318	131	101	86	0
		26 3%	26.3%	25 0%	27.9%	26 8%	0.0%
	Other pokie players at the venue	7	7	2	2	3	0
		6%	.6%	.4%	.6%	9%	0.0%
	Automatically joined with general venue membership	273	273	133	84	56	0
		22 6%	22.6%	25.4%	23.2%	17.4%	0.0%
	Other (Specify)	39	39	15	8	16	0
		3 2%	3.2%	2 9%	2.2%	5 0%	0.0%
	(Can't recall/ Don't know)	40	40	12	13	15	0
		3 3%	3.3%	2 3%	3.6%	4.7%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.26. When you signed up, did you receive information about ?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q26 MULTI	How to get points	800	800	353	242	205	0
		66 3%	66.3%	67.4%	66.9%	63 9%	0.0%
	How many points you need to get rewards	615	615	269	185	161	0
		51 0%	51.0%	51 3%	51.1%	50 2%	0.0%
	What kinds of rewards you could get	755	755	332	221	202	0
		62 6%	62.6%	63.4%	61.0%	62 9%	0.0%
	A gambling help line number or other information about where to get help for difficulties with gambling	598	598	266	174	158	0
		49 5%	49.5%	50 8%	48.1%	49 2%	0.0%
	Responsible gambling messages	542	542	236	160	146	0
		44 9%	44.9%	45 0%	44.2%	45 5%	0.0%
	(Didn't receive any information)	116	116	44	37	35	0
		9 6%	9.6%	8.4%	10.2%	10 9%	0.0%
	Anything else (Specify)	14	14	8	3	3	0
		1 2%	1.2%	1 5%	.8%	9%	0.0%
	(Can't recall/ Don't know)	145	145	49	49	47	0
		12 0%	12.0%	9.4%	13.5%	14 6%	0.0%
	(Refuse)	1	1	0	1	0	0
		.1%	.1%	0 0%	.3%	0 0%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.27. When you signed up, did you get any points or rewards right away?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1167	1167	484	362	321	0
Q27 MULTI	Yes - points	255	255	106	77	72	0
		21 9%	21.9%	21 9%	21.3%	22.4%	0.0%
	Yes - other rewards	181	181	89	42	50	0
		15 5%	15.5%	18.4%	11.6%	15 6%	0.0%
	No	551	551	230	174	147	0
		47 2%	47.2%	47 5%	48.1%	45 8%	0.0%
	(Don't know)	230	230	81	80	69	0
		19.7%	19.7%	16.7%	22.1%	21 5%	0.0%
TOTAL		1167	1167	484	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.28. How often do you receive any communications connected to this loyalty program, beyond the initial signup? Would you say you get something ?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.28. How often do you receive any communications connected to this loyalty program, beyond the initial signup? Would you say you get something ?	Daily	2	2	0	2	0	0
		2%	.2%	0 0%	.6%	0 0%	0.0%
	Most days a week	5	5	3	1	1	0
		.4%	.4%	6%	.3%	3%	0.0%
	Weekly	72	72	28	24	20	0
		6 0%	6.0%	5 3%	6.6%	6 2%	0.0%
	Fortnightly	55	55	21	22	12	0
		4 6%	4.6%	4 0%	6.1%	3.7%	0.0%
	Monthly	333	333	147	93	93	0
		27 6%	27.6%	28.1%	25.7%	29 0%	0.0%
	Quarterly	211	211	105	61	45	0
		17 5%	17.5%	20 0%	16.9%	14 0%	0.0%
	Once or twice a year	220	220	101	64	55	0
		18 2%	18.2%	19 3%	17.7%	17.1%	0.0%
	Never	284	284	109	88	87	0
		23 5%	23.5%	20 8%	24.3%	27.1%	0.0%
	(Don't know)	25	25	10	7	8	0
		2.1%	2.1%	1 9%	1.9%	2 5%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.29. And have you received these communications by ?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS & RECEIVE COMMUNICATIONS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		898	898	405	267	226	0
Q29 MULTI	Regular mail	659	659	300	199	160	0
		73.4%	73.4%	74.1%	74.5%	70 8%	0.0%
	Email	345	345	159	93	93	0
		38.4%	38.4%	39 3%	34.8%	41 2%	0.0%
	Text or SMS	128	128	44	48	36	0
		14 3%	14.3%	10 9%	18.0%	15 9%	0.0%
	Telephone	6	6	2	2	2	0
		.7%	.7%	5%	.7%	9%	0.0%
	Some other way (Specify)	12	12	4	5	3	0
		1 3%	1.3%	1 0%	1.9%	1 3%	0.0%
	(Don't know)	4	4	2	2	0	0
		.4%	.4%	5%	.7%	0 0%	0.0%
TOTAL		898	898	405	267	226	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.30. Do those communications include ?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS & RECEIVE COMMUNICATIONS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		898	898	405	267	226	0
Q30 MULTI	A summary of your spending	119	119	59	32	28	0
		13 3%	13.3%	14 6%	12.0%	12.4%	0.0%
	A summary of your points or tier level	291	291	130	85	76	0
		32.4%	32.4%	32.1%	31.8%	33 6%	0.0%
	Coupons	477	477	213	145	119	0
		53.1%	53.1%	52 6%	54.3%	52.7%	0.0%
	Information about special deals on meals or other non-gambling activities	728	728	329	211	188	0
		81.1%	81.1%	81 2%	79.0%	83 2%	0.0%
	Special deals on gambling (e.g. extra points; additional cash back)	311	311	140	87	84	0
		34 6%	34.6%	34 6%	32.6%	37 2%	0.0%
	Chance to win prize draws or information about prize draws	679	679	298	199	182	0
		75 6%	75.6%	73 6%	74.5%	80 5%	0.0%
	Information about special events or other events at the venue	701	701	308	211	182	0
		78.1%	78.1%	76 0%	79.0%	80 5%	0.0%
	Something else (Specify)	19	19	6	9	4	0
		2.1%	2.1%	1 5%	3.4%	1 8%	0.0%
	(Don't know)	23	23	11	8	4	0
		2 6%	2.6%	2.7%	3.0%	1 8%	0.0%
	(Refuse)	2	2	1	1	0	0
		2%	.2%	2%	.4%	0 0%	0.0%
TOTAL		898	898	405	267	226	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.31. Is there any (other) information they might give you that would help you gamble responsibly?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.31. Is there any (other) information they might give you that would help you gamble responsibly?	Yes	136	136	50	36	50	0
		11 3%	11.3%	9 5%	9.9%	15 6%	0.0%
	No	985	985	427	304	254	0
		81 6%	81.6%	81 5%	84.0%	79.1%	0.0%
	(Don't know)	86	86	47	22	17	0
		7.1%	7.1%	9 0%	6.1%	5 3%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.31. Other Information that could be provided to help you gamble responsibly

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS - OTHER SUGGESTIONS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		137	137	50	36	51	0
Q.31. Other Information that could be provided to help you gamble responsibly	Flyers/ brochures/ pamphlets - general	13	13	9	0	4	0
		9 5%	9.5%	18 0%	0.0%	7 8%	0.0%
	Gambling Helpline phone number	18	18	8	4	6	0
		13.1%	13.1%	16 0%	11.1%	11 8%	0.0%
	Messages/advertising regarding consequences of problem gambling	12	12	3	4	5	0
		8 8%	8.8%	6 0%	11.1%	9 8%	0.0%
	Summary / statement of spending	6	6	3	1	2	0
		4.4%	4.4%	6 0%	2.8%	3 9%	0.0%
	Responsible gambling messages already provided/ included	52	52	18	12	22	0
		38 0%	38.0%	36 0%	33.3%	43.1%	0.0%
	In venue/ on machines suggestion	24	24	5	9	10	0
		17 5%	17.5%	10 0%	25.0%	19 6%	0.0%
	Other	12	12	4	6	2	0
		8 8%	8.8%	8 0%	16.7%	3 9%	0.0%
TOTAL		137	137	50	36	51	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.32. When you visit this venue, how often do you use your loyalty program? Would you say you use it ?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.32. When you visit this venue, how often do you use your loyalty program? Would you say you use it ?	Every time you visit	805	805	354	226	225	0
		66.7%	66.7%	67 6%	62.4%	70.1%	0.0%
	Most times	154	154	77	45	32	0
		12 8%	12.8%	14.7%	12.4%	10 0%	0.0%
	Sometimes	84	84	35	31	18	0
		7 0%	7.0%	6.7%	8.6%	5 6%	0.0%
	Occasionally	62	62	21	23	18	0
		5.1%	5.1%	4 0%	6.4%	5 6%	0.0%
	Rarely	61	61	23	21	17	0
		5.1%	5.1%	4.4%	5.8%	5 3%	0.0%
	Never	39	39	13	15	11	0
		3 2%	3.2%	2 5%	4.1%	3.4%	0.0%
	(Don't know)	2	2	1	1	0	0
		2%	.2%	2%	.3%	0 0%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.33. Does your loyalty program have tiers?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.33. Does your loyalty program have tiers?	Yes	498	498	213	145	140	0
		41 3%	41.3%	40 6%	40.1%	43 6%	0.0%
	No	489	489	227	148	114	0
		40 5%	40.5%	43 3%	40.9%	35 5%	0.0%
	(Don't know)	220	220	84	69	67	0
		18 2%	18.2%	16 0%	19.1%	20 9%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.34. Do you accrue points with your loyalty program which you can then turn in for rewards?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1167	1167	484	362	321	0
Q.34. Do you accrue points with your loyalty program which you can then turn in for rewards?	Yes	983	983	417	299	267	0
		84 2%	84.2%	86 2%	82.6%	83 2%	0.0%
	No	93	93	35	34	24	0
		8 0%	8.0%	7 2%	9.4%	7 5%	0.0%
	(Don't know)	91	91	32	29	30	0
		7 8%	7.8%	6 6%	8.0%	9 3%	0.0%
TOTAL		1167	1167	484	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.35. How can you get points? Do you get them

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS WHO ACCRUE PO NTS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1023	1023	457	299	267	0
Q35 MULTI	When you swipe your card on entry to the venue	464	464	210	133	121	0
		45.4%	45.4%	46 0%	44.5%	45 3%	0.0%
	When you insert your card into pokie machines	890	890	383	268	239	0
		87 0%	87.0%	83 8%	89.6%	89 5%	0.0%
	When you present your card at gaming tables or other gaming areas	318	318	140	84	94	0
		31.1%	31.1%	30 6%	28.1%	35 2%	0.0%
	When you present your card with other purchases like food, drinks or accommodation	796	796	340	222	234	0
		77 8%	77.8%	74.4%	74.2%	87 6%	0.0%
	When you present your card at a rewards counter	270	270	126	72	72	0
		26.4%	26.4%	27 6%	24.1%	27 0%	0.0%
	When you present your card at partner venues	195	195	84	52	59	0
		19.1%	19.1%	18.4%	17.4%	22.1%	0.0%
	Some other way (Specify)	19	19	6	3	10	0
		1 9%	1.9%	1 3%	1.0%	3.7%	0.0%
	(Don't know)	5	5	3	2	0	0
		5%	.5%	.7%	.7%	0 0%	0.0%
TOTAL		1023	1023	457	299	267	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.36. Which of the following types of rewards can you get through your loyalty program?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q36 MULTI	Food or meals	966	966	427	283	256	0
		80 0%	80.0%	81 5%	78.2%	79 8%	0.0%
	Non-alcoholic drinks	838	838	367	248	223	0
		69.4%	69.4%	70 0%	68.5%	69 5%	0.0%
	Alcoholic drinks	708	708	317	211	180	0
		58.7%	58.7%	60 5%	58.3%	56.1%	0.0%
	Cash	262	262	115	79	68	0
		21.7%	21.7%	21 9%	21.8%	21 2%	0.0%
	Gambling credits	419	419	187	124	108	0
		34.7%	34.7%	35.7%	34.3%	33 6%	0.0%
	Gift cards (for example Myer/Coles)	292	292	135	81	76	0
		24 2%	24.2%	25 8%	22.4%	23.7%	0.0%
	Prizes (e.g. household goods)	595	595	273	179	143	0
		49 3%	49.3%	52.1%	49.4%	44 5%	0.0%
	Venue shop/merchandise	363	363	159	100	104	0
		30.1%	30.1%	30 3%	27.6%	32.4%	0.0%
	Entertainment (for example concerts or shows)	295	295	140	83	72	0
		24.4%	24.4%	26.7%	22.9%	22.4%	0.0%
	Accommodation	275	275	132	74	69	0
		22 8%	22.8%	25 2%	20.4%	21 5%	0.0%
	Special treatment by staff	168	168	79	53	36	0
		13 9%	13.9%	15.1%	14.6%	11 2%	0.0%
	Free/discounted parking	338	338	162	90	86	0
		28 0%	28.0%	30 9%	24.9%	26 8%	0.0%
	Something else (Specify)	21	21	5	4	12	0
		1.7%	1.7%	1 0%	1.1%	3.7%	0.0%
	(Don't know)	55	55	17	19	19	0
		4 6%	4.6%	3 2%	5.2%	5 9%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.37. Have you ever done any of the following

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1167	1167	484	362	321	0
Q37 MULTI	Played for longer than you intended to so you could get more rewards	224	224	107	65	52	0
		19 2%	19.2%	22.1%	18.0%	16 2%	0.0%
	Visited a venue more often than you would otherwise so you could get more rewards	168	168	79	49	40	0
		14.4%	14.4%	16 3%	13.5%	12 5%	0.0%
	Spent more money than you would have otherwise so you could get more rewards	193	193	92	60	41	0
		16 5%	16.5%	19 0%	16.6%	12 8%	0.0%
	(None of these)	850	850	330	270	250	0
		72 8%	72.8%	68 2%	74.6%	77 9%	0.0%
	(Don't know)	5	5	3	0	2	0
		.4%	.4%	6%	0.0%	6%	0.0%
	(Refuse)	4	4	2	2	0	0
		3%	.3%	.4%	.6%	0 0%	0.0%
TOTAL		1167	1167	484	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.38a. How often do you usually play the pokies at this venue?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.38. How often do you usually play the pokies at this venue?	Once or twice a year	142	142	57	41	44	0
		11 8%	11.8%	10 9%	11.3%	13.7%	0.0%
	Every 2 - 3 months	268	268	100	91	77	0
		22 2%	22.2%	19.1%	25.1%	24 0%	0.0%
	Monthly	258	258	116	73	69	0
		21.4%	21.4%	22.1%	20.2%	21 5%	0.0%
	Fortnightly	232	232	110	70	52	0
		19 2%	19.2%	21 0%	19.3%	16 2%	0.0%
	Weekly	185	185	88	52	45	0
		15 3%	15.3%	16 8%	14.4%	14 0%	0.0%
	More than once a week	115	115	53	34	28	0
		9 5%	9.5%	10.1%	9.4%	8.7%	0.0%
	(Don't know)	6	6	0	1	5	0
		5%	.5%	0 0%	.3%	1 6%	0.0%
	(Refused)	1	1	0	0	1	0
		.1%	.1%	0 0%	0.0%	3%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.38b. When you play the pokies at this venue, about how long do you usually spend gambling?

			LPM	LPM		NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 2	Wave 3	Total
Sample Size		683	683	362	321	0
Q.38.b) When you play the pokies at this venue, about how long do you usually spend gambling?	Less than an hour	399	399	202	197	0
		58.4%	58.4%	55 8%	61.4%	0 0%
	One to two hours	162	162	84	78	0
		23.7%	23.7%	23 2%	24.3%	0 0%
	Two to three hours	42	42	23	19	0
		6.1%	6.1%	6.4%	5.9%	0 0%
	More than three hours	48	48	31	17	0
		7 0%	7.0%	8 6%	5.3%	0 0%
	Missing - not asked	15	15	15	0	0
		2 2%	2.2%	4.1%	0.0%	0 0%
	(Don't know)	17	17	7	10	0
		2 5%	2.5%	1 9%	3.1%	0 0%
TOTAL		683	683	362	321	0
		100 0%	100.0%	100 0%	100.0%	0 0%

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Q.39. When you play the pokies at this venue, about how long do you usually stay?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.39. When you play the pokies at this venue, about how long do you usually stay?	Less than an hour	242	242	150	52	40	0
		20 0%	20.0%	28 6%	14.4%	12 5%	0.0%
	One to two hours	430	430	186	129	115	0
		35 6%	35.6%	35 5%	35.6%	35 8%	0.0%
	Two to three hours	220	220	78	74	68	0
		18 2%	18.2%	14 9%	20.4%	21 2%	0.0%
	More than three hours	302	302	109	104	89	0
		25 0%	25.0%	20 8%	28.7%	27.7%	0.0%
	(Don't know)	13	13	1	3	9	0
		1.1%	1.1%	2%	.8%	2 8%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.40. Thinking about the last time you played the pokies at this particular venue, approximately how much money did you spend playing the pokies on that occasion?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.40. Thinking about the last time you played the pokies at this particular venue, approximately how much money did you spend playing the pokies on that occasion?	$1 - $10	207	207	93	58	56	0
		17.1%	17.1%	17.7%	16.0%	17.4%	0.0%
	$11 - $20	242	242	110	74	58	0
		20 0%	20.0%	21 0%	20.4%	18.1%	0.0%
	$21 - $50	324	324	119	100	105	0
		26 8%	26.8%	22.7%	27.6%	32.7%	0.0%
	$51 - $100	200	200	100	52	48	0
		16 6%	16.6%	19.1%	14.4%	15 0%	0.0%
	$101 - $200	129	129	55	42	32	0
		10.7%	10.7%	10 5%	11.6%	10 0%	0.0%
	More than $200	93	93	40	33	20	0
		7.7%	7.7%	7 6%	9.1%	6 2%	0.0%
	(Don't know)	6	6	3	2	1	0
		5%	.5%	6%	.6%	3%	0.0%
	(Refused)	6	6	4	1	1	0
		5%	.5%	8%	.3%	3%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.41. If this venue discontinued its loyalty program, do you think you would play the pokies at this venue much less, a bit less, or the same as now?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.41. If this venue discontinued its loyalty program, do you think you would play the pokies at this venue much less, a bit less, or the same as now?	Much less	104	104	42	30	32	0
		8 6%	8.6%	8 0%	8.3%	10 0%	0.0%
	A bit less	129	129	65	36	28	0
		10.7%	10.7%	12.4%	9.9%	8.7%	0.0%
	Same	965	965	416	291	258	0
		80 0%	80.0%	79.4%	80.4%	80.4%	0.0%
	(Don't know)	9	9	1	5	3	0
		.7%	.7%	2%	1.4%	9%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.42. To what extent do you agree or disagree that having a loyalty program membership results in you gambling more than you would otherwise?

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBERS		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1207	1207	524	362	321	0
Q.42. To what extent do you agree or disagree that having a loyalty program membership results in you gambling more than you would otherwise?	Strongly agree	85	85	34	28	23	0
		7 0%	7.0%	6 5%	7.7%	7 2%	0.0%
	Agree	224	224	105	64	55	0
		18 6%	18.6%	20 0%	17.7%	17.1%	0.0%
	(Neither agree nor disagree)	58	58	30	13	15	0
		4 8%	4.8%	5.7%	3.6%	4.7%	0.0%
	Disagree	556	556	236	180	140	0
		46.1%	46.1%	45 0%	49.7%	43 6%	0.0%
	Strongly disagree	276	276	118	74	84	0
		22 9%	22.9%	22 5%	20.4%	26 2%	0.0%
	(Don't know)	8	8	1	3	4	0
		.7%	.7%	2%	.8%	1 2%	0.0%
TOTAL		1207	1207	524	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%
% Strongly agree/Agree		309	309	139	92	78	0
		25 8%	25.8%	26 6%	25.6%	24 6%	0.0%

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Q.43.a) Agreement - I feel like a part of the family when I'm at the venue.

			LPM	LPM			NON LPM	NON LPM	
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.a) Agreement - I feel like a part of the family when I'm at the venue.	Strongly agree	88	55	28	14	13	33	15	7	11
		4 0%	4.6%	5 3%	3.9%	4 0%	3.3%	3 3%	2.3%	4 3%
	Agree	672	417	176	129	112	255	113	74	68
		30.4%	34.5%	33 6%	35.6%	34 9%	25.3%	25 2%	24.7%	26.4%
	(Neither agree nor disagree)	117	64	27	22	15	53	23	17	13
		5 3%	5.3%	5 2%	6.1%	4.7%	5.3%	5.1%	5.7%	5 0%
	Disagree	1035	561	243	167	151	474	213	141	120
		46 8%	46.5%	46.4%	46.1%	47 0%	47.1%	47.4%	47.2%	46 5%
	Strongly disagree	294	109	49	30	30	185	82	60	43
		13 3%	9.0%	9.4%	8.3%	9 3%	18.4%	18 3%	20.1%	16.7%
	(Don't know/ can't say)	7	1	1	0	0	6	3	0	3
		3%	.1%	2%	0.0%	0 0%	.6%	.7%	0.0%	1 2%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		760	472	204	143	125	288	128	81	79
		34 5%	39.1%	39 0%	39.5%	38 9%	28.8%	28.7%	27.1%	31 0%

Q.43.b) Agreement - Spending time at the venue is important to me.

			LPM	LPM			NON LPM	NON LPM	
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.b) Agreement - Spending time at the venue is important to me.	Strongly agree	41	22	13	4	5	19	6	7	6
		1 9%	1.8%	2 5%	1.1%	1 6%	1.9%	1 3%	2.3%	2 3%
	Agree	456	278	117	89	72	178	93	41	44
		20 6%	23.0%	22 3%	24.6%	22.4%	17.7%	20.7%	13.7%	17.1%
	(Neither agree nor disagree)	102	59	29	15	15	43	22	11	10
		4 6%	4.9%	5 5%	4.1%	4.7%	4.3%	4 9%	3.7%	3 9%
	Disagree	1247	699	309	210	180	548	229	175	144
		56 3%	57.9%	59 0%	58.0%	56.1%	54.5%	51 0%	58.5%	55 8%
	Strongly disagree	363	148	55	44	49	215	98	65	52
		16.4%	12.3%	10 5%	12.2%	15 3%	21.4%	21 8%	21.7%	20 2%
	(Don't know/ can't say)	4	1	1	0	0	3	1	0	2
		2%	.1%	2%	0.0%	0 0%	.3%	2%	0.0%	8%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		497	300	130	93	77	197	99	48	50
		22 5%	24.9%	24 9%	25.7%	24 0%	19.6%	22.1%	16.1%	19 5%

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Q.43.c) Agreement - I trust the management of the venue..

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.c) Agreement - I trust the management of the venue.	Strongly agree	180	103	48	25	30	77	34	23	20
		8.1%	8.5%	9 2%	6.9%	9 3%	7.7%	7 6%	7.7%	7 8%
	Agree	1282	725	317	218	190	557	261	154	142
		57 9%	60.1%	60 5%	60.2%	59 2%	55.4%	58.1%	51.5%	55 0%
	(Neither agree nor disagree)	206	102	42	31	29	104	45	34	25
		9 3%	8.5%	8 0%	8.6%	9 0%	10.3%	10 0%	11.4%	9.7%
	Disagree	358	196	86	63	47	162	66	53	43
		16 2%	16.2%	16.4%	17.4%	14 6%	16.1%	14.7%	17.7%	16.7%
	Strongly disagree	98	41	16	11	14	57	26	20	11
		4.4%	3.4%	3.1%	3.0%	4.4%	5.7%	5 8%	6.7%	4 3%
	(Don't know/ can't say)	89	40	15	14	11	49	17	15	17
		4 0%	3.3%	2 9%	3.9%	3.4%	4.9%	3 8%	5.0%	6 6%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1462	828	365	243	220	634	295	177	162
		68 8%	71.0%	71.7%	69.8%	71 0%	66.2%	68 3%	62.3%	67 2%

Q.43.d) Agreement - I am sure the service that I get at the venue will be the same every time I visit.

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.d) Agreement - I am sure the service that I get at the venue will be the same every time I visit.	Strongly agree	269	139	64	38	37	130	68	30	32
		12 2%	11.5%	12 2%	10.5%	11 5%	12.9%	15.1%	10.0%	12.4%
	Agree	1655	919	401	269	249	736	317	234	185
		74 8%	76.1%	76 5%	74.3%	77 6%	73.2%	70 6%	78.3%	71.7%
	(Neither agree nor disagree)	53	20	6	6	8	33	16	10	7
		2.4%	1.7%	1.1%	1.7%	2 5%	3.3%	3 6%	3.3%	2.7%
	Disagree	194	112	42	46	24	82	37	21	24
		8 8%	9.3%	8 0%	12.7%	7 5%	8.2%	8 2%	7.0%	9 3%
	Strongly disagree	18	6	5	0	1	12	5	2	5
		8%	.5%	1 0%	0.0%	3%	1.2%	1.1%	.7%	1 9%
	(Don't know/ can't say)	24	11	6	3	2	13	6	2	5
		1.1%	.9%	1.1%	.8%	6%	1.3%	1 3%	.7%	1 9%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1924	1058	465	307	286	866	385	264	217
		87 9%	88.5%	89 8%	85.5%	89.7%	87.2%	86 9%	88.9%	85 8%

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Q.43.e) Agreement - I tell other people positive things about the venue.

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.e) Agreement - I tell other people positive things about the venue.	Strongly agree	160	89	48	19	22	71	39	16	16
		7 2%	7.4%	9 2%	5.2%	6 9%	7.1%	8.7%	5.4%	6 2%
	Agree	1156	700	313	206	181	456	196	142	118
		52 2%	58.0%	59.7%	56.9%	56.4%	45.3%	43.7%	47.5%	45.7%
	(Neither agree nor disagree)	201	98	37	35	26	103	52	19	32
		9.1%	8.1%	7.1%	9.7%	8.1%	10.2%	11 6%	6.4%	12.4%
	Disagree	602	292	110	99	83	310	137	99	74
		27 2%	24.2%	21 0%	27.3%	25 9%	30.8%	30 5%	33.1%	28.7%
	Strongly disagree	77	21	13	0	8	56	22	21	13
		3 5%	1.7%	2 5%	0.0%	2 5%	5.6%	4 9%	7.0%	5 0%
	(Don't know/ can't say)	17	7	3	3	1	10	3	2	5
		8%	.6%	6%	.8%	3%	1.0%	.7%	.7%	1 9%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1316	789	361	225	203	527	235	158	134
		59 9%	65.8%	69 3%	62.7%	63.4%	52.9%	52.7%	53.2%	53 0%

Q.43.f) Agreement - I would recommend the venue to other people.

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.f) Agreement - I would recommend the venue to other people.	Strongly agree	226	125	59	34	32	101	54	21	26
		10 2%	10.4%	11 3%	9.4%	10 0%	10.0%	12 0%	7.0%	10.1%
	Agree	1407	813	353	246	214	594	253	181	160
		63 6%	67.4%	67.4%	68.0%	66.7%	59.0%	56 3%	60.5%	62 0%
	(Neither agree nor disagree)	116	58	19	22	17	58	30	15	13
		5 2%	4.8%	3 6%	6.1%	5 3%	5.8%	6.7%	5.0%	5 0%
	Disagree	391	183	78	55	50	208	95	66	47
		17.7%	15.2%	14 9%	15.2%	15 6%	20.7%	21 2%	22.1%	18 2%
	Strongly disagree	61	21	11	3	7	40	14	16	10
		2 8%	1.7%	2.1%	.8%	2 2%	4.0%	3.1%	5.4%	3 9%
	(Don't know/ can't say)	12	7	4	2	1	5	3	0	2
		5%	.6%	8%	.6%	3%	.5%	.7%	0.0%	8%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1633	938	412	280	246	695	307	202	186
		74 2%	78.2%	79 2%	77.8%	76 9%	69.4%	68 8%	67.6%	72.7%

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Q.43.g) Agreement - If I switched to another venue to play the pokies, I might not receive the same benefits I get at this venue.

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.g) Agreement - If I switched to another venue to play the pokies, I might not receive the same benefits I get at this venue.	Strongly agree	95	69	30	20	19	26	13	7	6
		4 3%	5.7%	5.7%	5.5%	5 9%	2.6%	2 9%	2.3%	2 3%
	Agree	568	405	191	113	101	163	85	45	33
		25.7%	33.6%	36 5%	31.2%	31 5%	16.2%	18 9%	15.1%	12 8%
	(Neither agree nor disagree)	208	98	43	30	25	110	50	29	31
		9.4%	8.1%	8 2%	8.3%	7 8%	10.9%	11.1%	9.7%	12 0%
	Disagree	999	479	191	148	140	520	221	162	137
		45.1%	39.7%	36 5%	40.9%	43 6%	51.7%	49 2%	54.2%	53.1%
	Strongly disagree	139	49	22	19	8	90	37	28	25
		6 3%	4.1%	4 2%	5.2%	2 5%	8.9%	8 2%	9.4%	9.7%
	(Don't know/ can't say)	203	107	47	32	28	96	43	28	25
		9 2%	8.9%	9 0%	8.8%	8.7%	9.5%	9 6%	9.4%	9.7%
	(Refuse)	1	0	0	0	0	1	0	0	1
		0%	0.0%	0 0%	0.0%	0 0%	.1%	0 0%	0.0%	.4%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		663	474	221	133	120	189	98	52	39
		33 0%	43.1%	46 3%	40.3%	41 0%	20.8%	24.1%	19.2%	16 8%

Q.43.h) Agreement - If I switched to a different venue, I might not receive the service I am used to.

			LPM	LPM			NON LPM	NON LPM		
BASE: PLAYED POKIES N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1207	524	362	321	1006	449	299	258
Q.43.h) Agreement - If I switched to a different venue, I might not receive the service I am used to.	Strongly agree	80	52	23	14	15	28	13	8	7
		3 6%	4.3%	4.4%	3.9%	4.7%	2.8%	2 9%	2.7%	2.7%
	Agree	650	404	200	108	96	246	118	71	57
		29.4%	33.5%	38 2%	29.8%	29 9%	24.5%	26 3%	23.7%	22.1%
	(Neither agree nor disagree)	171	90	37	28	25	81	41	20	20
		7.7%	7.5%	7.1%	7.7%	7 8%	8.1%	9.1%	6.7%	7 8%
	Disagree	1056	547	216	177	154	509	212	156	141
		47.7%	45.3%	41 2%	48.9%	48 0%	50.6%	47 2%	52.2%	54.7%
	Strongly disagree	96	32	16	7	9	64	27	21	16
		4 3%	2.7%	3.1%	1.9%	2 8%	6.4%	6 0%	7.0%	6 2%
	(Don't know/ can't say)	159	82	32	28	22	77	38	23	16
		7 2%	6.8%	6.1%	7.7%	6 9%	7.7%	8 5%	7.7%	6 2%
	(Refuse)	1	0	0	0	0	1	0	0	1
		0%	0.0%	0 0%	0.0%	0 0%	.1%	0 0%	0.0%	.4%
TOTAL		2213	1207	524	362	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		730	456	223	122	111	274	131	79	64
		35 6%	40.5%	45 3%	36.5%	37.1%	29.5%	31 9%	28.6%	26 6%

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Q.44. Do you think there should be voluntary pre-commitment schemes, mandatory pre-commitment schemes, or no pre-commitment schemes?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.44. Do you think there should be voluntary pre-commitment schemes, mandatory pre-commitment schemes, or no pre-commitment schemes?	Mandatory only	549	278	123	77	78	271	130	80	61
		24 8%	23.0%	23 5%	21.3%	24.1%	26.9%	29 0%	26.8%	23 6%
	Voluntary only	1163	664	274	209	181	499	209	159	131
		52 5%	54.9%	52 3%	57.7%	55 9%	49.6%	46 5%	53.2%	50 8%
	Neither - no pre-commitment schemes	423	236	115	68	53	187	91	47	49
		19.1%	19.5%	21 9%	18.8%	16.4%	18.6%	20 3%	15.7%	19 0%
	(Don't know)	80	32	12	8	12	48	18	13	17
		3 6%	2.6%	2 3%	2.2%	3.7%	4.8%	4 0%	4.3%	6 6%
	(Refuse)	1	0	0	0	0	1	1	0	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.45. What if this would mean you couldn't accrue as many loyalty points – Do you still agree there should be mandatory pre-commitment schemes for pokie players?

			LPM	LPM			NON LPM	NON LPM		
BASE: PREFERED MANDATORY PRE-COMMITMENT SCHEME		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		549	278	123	77	78	271	130	80	61
Q.45. What if this would mean you couldn't accrue as many loyalty points – Do you still agree there should be mandatory pre-commitment schemes for pokie players?	Still agree	510	259	114	69	76	251	121	75	55
		92 9%	93.2%	92.7%	89.6%	97.4%	92.6%	93.1%	93.8%	90 2%
	No longer agree - should be voluntary	18	12	7	5	0	6	2	0	4
		3 3%	4.3%	5.7%	6.5%	0 0%	2.2%	1 5%	0.0%	6 6%
	No longer agree - no pre-commitment	4	2	0	1	1	2	0	0	2
		.7%	.7%	0 0%	1.3%	1 3%	.7%	0 0%	0.0%	3 3%
	(Don't know)	17	5	2	2	1	12	7	5	0
		3.1%	1.8%	1 6%	2.6%	1 3%	4.4%	5.4%	6.3%	0 0%
TOTAL		549	278	123	77	78	271	130	80	61
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.46.a) Agreement - Gambling loyalty programs are a good idea.

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.46.a) Agreement - Gambling loyalty programs are a good idea.	Strongly agree	82	60	30	12	18	22	10	7	5
		3.7%	5.0%	5.7%	3.3%	5 6%	2.2%	2 2%	2.3%	1 9%
	Agree	928	657	286	204	167	271	133	72	66
		41 9%	54.3%	54 6%	56.4%	51 5%	26.9%	29 6%	24.1%	25 6%
	(Neither agree nor disagree)	200	117	46	35	36	83	37	27	19
		9 0%	9.7%	8 8%	9.7%	11.1%	8.3%	8 2%	9.0%	7.4%
	Disagree	771	314	137	90	87	457	185	147	125
		34 8%	26.0%	26.1%	24.9%	26 9%	45.4%	41 2%	49.2%	48.4%
	Strongly disagree	194	49	24	16	9	145	74	38	33
		8 8%	4.0%	4 6%	4.4%	2 8%	14.4%	16 5%	12.7%	12 8%
	(Don't know/ can't say)	41	13	1	5	7	28	10	8	10
		1 9%	1.1%	2%	1.4%	2 2%	2.8%	2 2%	2.7%	3 9%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1010	717	316	216	185	293	143	79	71
		46.4%	59.9%	60.4%	60.5%	58.4%	30.0%	32 6%	27.1%	28 6%

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Q.46.b) Agreement - Gambling loyalty programs make people more loyal to a particular venue, so they go there rather than to other venues.

			LPM	LPM			NON LPM	NON LPM	
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.46.b) Agreement - Gambling loyalty programs make people more loyal to a particular venue, so they go there rather than to other venues.	Strongly agree	247	124	56	35	33	123	57	30	36
		11.1%	10.2%	10.7%	9.7%	10 2%	12.2%	12.7%	10.0%	14 0%
	Agree	1457	754	321	226	207	703	322	214	167
		65.7%	62.3%	61 3%	62.4%	63 9%	69.9%	71.7%	71.6%	64.7%
	(Neither agree nor disagree)	81	49	23	9	17	32	13	11	8
		3.7%	4.0%	4.4%	2.5%	5 2%	3.2%	2 9%	3.7%	3.1%
	Disagree	354	258	114	81	63	96	39	29	28
		16 0%	21.3%	21 8%	22.4%	19.4%	9.5%	8.7%	9.7%	10 9%
	Strongly disagree	23	9	4	5	0	14	4	5	5
		1 0%	.7%	8%	1.4%	0 0%	1.4%	9%	1.7%	1 9%
	(Don't know/ can't say)	54	16	6	6	4	38	14	10	14
		2.4%	1.3%	1.1%	1.7%	1 2%	3.8%	3.1%	3.3%	5.4%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1704	878	377	261	240	826	379	244	203
		78 8%	73.5%	72 8%	73.3%	75 0%	85.3%	87.1%	84.4%	83 2%

Q.46.c) Agreement - Gambling loyalty programs make people gamble more than they would otherwise.

			LPM	LPM			NON LPM	NON LPM	
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.46.c) Agreement - Gambling loyalty programs make people gamble more than they would otherwise.	Strongly agree	231	86	40	23	23	145	70	40	35
		10.4%	7.1%	7 6%	6.4%	7.1%	14.4%	15 6%	13.4%	13 6%
	Agree	1078	516	224	154	138	562	238	174	150
		48 6%	42.6%	42.7%	42.5%	42 6%	55.9%	53 0%	58.2%	58.1%
	(Neither agree nor disagree)	135	77	31	20	26	58	31	16	11
		6.1%	6.4%	5 9%	5.5%	8 0%	5.8%	6 9%	5.4%	4 3%
	Disagree	640	463	209	138	116	177	82	50	45
		28 9%	38.3%	39 9%	38.1%	35 8%	17.6%	18 3%	16.7%	17.4%
	Strongly disagree	45	35	16	10	9	10	4	4	2
		2 0%	2.9%	3.1%	2.8%	2 8%	1.0%	9%	1.3%	8%
	(Don't know/ can't say)	87	33	4	17	12	54	24	15	15
		3 9%	2.7%	8%	4.7%	3.7%	5.4%	5 3%	5.0%	5 8%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1309	602	264	177	161	707	308	214	185
		61 5%	51.1%	50 8%	51.3%	51 6%	74.3%	72 5%	75.4%	76.1%

Q.47.a) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - Advertising encouraging people to gamble responsibly.

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBER		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1160	1160	477	362	321	0
Q.47.a) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - Advertising encouraging people to gamble responsibly.	Yes	1084	1084	446	338	300	0
		93.4%	93.4%	93 5%	93.4%	93 5%	0.0%
	No	64	64	25	22	17	0
		5 5%	5.5%	5 2%	6.1%	5 3%	0.0%
	(Don't know)	12	12	6	2	4	0
		1 0%	1.0%	1 3%	.6%	1 2%	0.0%
TOTAL		1160	1160	477	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.47.b) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - The 'Gambling Helpline' phone number.

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBER		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1160	1160	477	362	321	0
Q.47.b) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - The 'Gambling Helpline' phone number.	Yes	1111	1111	457	347	307	0
		95 8%	95.8%	95 8%	95.9%	95 6%	0.0%
	No	35	35	15	10	10	0
		3 0%	3.0%	3.1%	2.8%	3.1%	0.0%
	(Don't know)	14	14	5	5	4	0
		1 2%	1.2%	1 0%	1.4%	1 2%	0.0%
TOTAL		1160	1160	477	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.47.c) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - Face-to-face gambling help services for gamblers in your area.

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBER		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1160	1160	477	362	321	0
Q.47.c) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - Face-to-face gambling help services for gamblers in your area.	Yes	264	264	105	90	69	0
		22 8%	22.8%	22 0%	24.9%	21 5%	0.0%
	No	799	799	340	236	223	0
		68 9%	68.9%	71 3%	65.2%	69 5%	0.0%
	(Don't know)	97	97	32	36	29	0
		8.4%	8.4%	6.7%	9.9%	9 0%	0.0%
TOTAL		1160	1160	477	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.47.d) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - Gambling help online

			LPM	LPM			NON LPM
BASE: LOYALTY PROGRAM MEMBER		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1160	1160	477	362	321	0
Q.47.d) Have you seen or heard any of the following at a pokies venue or in communications sent to you by a venue? - Gambling help online.	Yes	723	723	298	230	195	0
		62 3%	62.3%	62 5%	63.5%	60.7%	0.0%
	No	367	367	149	110	108	0
		31 6%	31.6%	31 2%	30.4%	33 6%	0.0%
	(Don't know)	70	70	30	22	18	0
		6 0%	6.0%	6 3%	6.1%	5 6%	0.0%
TOTAL		1160	1160	477	362	321	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

Q.48. Do you remember if you saw any of those ?

			LPM	LPM			NON LPM
BASE: HAVE SEEN OR HEARD RESPONSIBLE GAMBLING MESSAGES		Total	Total	Wave 1	Wave 2	Wave 3	Total
Sample Size		1139	1139	469	355	315	0
Q48 MULTI	Posted on gaming machines at the venue	848	848	348	261	239	0
		74 5%	74.5%	74 2%	73.5%	75 9%	0.0%
	Posted on an information board at the venue	745	745	303	239	203	0
		65.4%	65.4%	64 6%	67.3%	64.4%	0.0%
	Posted elsewhere at the venue	860	860	335	279	246	0
		75 5%	75.5%	71.4%	78.6%	78.1%	0.0%
	In materials you received when you signed up for a loyalty program	378	378	152	117	109	0
		33 2%	33.2%	32.4%	33.0%	34 6%	0.0%
	In other communications from the venue	375	375	135	122	118	0
		32 9%	32.9%	28 8%	34.4%	37 5%	0.0%
	Other (Specify)	23	23	9	6	8	0
		2 0%	2.0%	1 9%	1.7%	2 5%	0.0%
	(Don't know)	15	15	5	6	4	0
		1 3%	1.3%	1.1%	1.7%	1 3%	0.0%
TOTAL		1139	1139	469	355	315	0
		100 0%	100.0%	100 0%	100.0%	100 0%	0.0%

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Q.49. Is there anything else you would like to say about gambling loyalty programs?

			LPM	LPM			NON LPM	NON LPM	
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.49. Is there anything else you would like to say about gambling loyalty programs?	Yes	651	361	158	108	95	290	118	80	92
		29.4%	29.8%	30 2%	29.8%	29 3%	28.8%	26 3%	26.8%	35.7%
	No	1565	849	366	254	229	716	331	219	166
		70 6%	70.2%	69 8%	70.2%	70.7%	71.2%	73.7%	73.2%	64 3%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.49. Is there anything else you would like to say about gambling loyalty programs?

			LPM	LPM		NON LPM	NON LPM	
BASE: HAVE COMMENTS ABOUT GAMBL NG LOYALTY PROGRAMS		Total	Total	Wave 1	Wave 2	Total	Wave 1	Wave 2
Sample Size		464	266	158	108	198	118	80
Q.49 - CODED	Loyalty programs are bad as they encourage people to gamble more	118	58	35	23	60	33	27
		25.4%	21.8%	22 2%	21.3%	30 3%	28.0%	33 8%
	Loyalty programs are bad/ bad idea – NFI	35	13	6	7	22	11	11
		7 5%	4.9%	3 8%	6.5%	11.1%	9.3%	13 8%
	Loyalty programs are useless/ not beneficial/ don't reward customer	55	32	20	12	23	11	12
		11 9%	12.0%	12.7%	11.1%	11 6%	9.3%	15 0%
	Loyalty programs are just about making money for the club/ in club's favour	24	8	7	1	16	9	7
		5 2%	3.0%	4.4%	.9%	8.1%	7.6%	8 8%
	Loyalty programs should carry extra restrictions/ limitations (i.e. increase age limit, spend amount)	19	9	6	3	10	4	6
		4.1%	3.4%	3 8%	2.8%	5.1%	3.4%	7 5%
	Loyalty programs should be banned/ shouldn't exist/ should be made illegal	39	14	3	11	25	13	12
		8.4%	5.3%	1 9%	10.2%	12 6%	11.0%	15 0%
	Loyalty programs are a good idea/ they're fine/ no problem	27	22	13	9	5	3	2
		5 8%	8.3%	8 2%	8.3%	2 5%	2.5%	2 5%
	If used responsibly loyalty programs are fine/ t is up to the individual	29	18	8	10	11	7	4
		6 3%	6.8%	5.1%	9.3%	5 6%	5.9%	5 0%
	Its nice to be rewarded/ I appreciate the bonuses/ meal discounts etc	62	48	30	18	14	7	7
		13.4%	18.0%	19 0%	16.7%	7.1%	5.9%	8 8%
	Loyalty programs make you feel more valued/ included	5	4	3	1	1	1	0
		1.1%	1.5%	1 9%	.9%	5%	.8%	0 0%
	Loyalty programs don't have an effect on the amount gambled/ not influential	46	41	20	21	5	2	3
		9 9%	15.4%	12.7%	19.4%	2 5%	1.7%	3 8%
	Pokies should not be advertised on tv/ should not be advertised	1	0	0	0	1	1	0
		2%	0.0%	0 0%	0.0%	5%	.8%	0 0%
	Greater regulations/ restrictions should be placed on pokies in general	34	13	9	4	21	18	3
		7 3%	4.9%	5.7%	3.7%	10 6%	15.3%	3 8%
	More support is needed for problem gamblers	13	10	9	1	3	2	1
		2 8%	3.8%	5.7%	.9%	1 5%	1.7%	1 3%
	Pokies/ Loyalty programs take advantage of vulnerable people	66	32	24	8	34	30	4
		14 2%	12.0%	15 2%	7.4%	17 2%	25.4%	5 0%
	Gambling/ pokies are bad - NFI	10	3	3	0	7	5	2
		2 2%	1.1%	1 9%	0.0%	3 5%	4.2%	2 5%
	Don't know/ Unsure	8	3	2	1	5	1	4
		1.7%	1.1%	1 3%	.9%	2 5%	.8%	5 0%
	Other	27	19	13	6	8	4	4
		5 8%	7.1%	8 2%	5.6%	4 0%	3.4%	5 0%
TOTAL		464	266	158	108	198	118	80
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.50.a) Agreement - Gambling makes me feel really alive.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.a) Agreement - Gambling makes me feel really alive.	Strongly agree	35	27	12	7	8	8	3	3	2
		1 6%	2.2%	2 3%	1.9%	2 5%	.8%	.7%	1.0%	8%
	Agree	509	315	147	86	82	194	90	65	39
		23 0%	26.1%	28.1%	23.8%	25 5%	19.3%	20 0%	21.7%	15.1%
	(Neither agree nor disagree)	1179	646	272	206	168	533	230	161	142
		53 3%	53.5%	51 9%	56.9%	52 2%	53.0%	51 2%	53.8%	55 0%
	Disagree	440	187	76	53	58	253	116	68	69
		19 9%	15.5%	14 5%	14.6%	18 0%	25.1%	25 8%	22.7%	26.7%
	(Don't know/ can't say)	50	32	16	10	6	18	10	2	6
		2 3%	2.6%	3.1%	2.8%	1 9%	1.8%	2 2%	.7%	2 3%
	(Refuse)	1	1	1	0	0	0	0	0	0
		0%	.1%	2%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		544	342	159	93	90	202	93	68	41
		25 2%	29.1%	31.4%	26.4%	28 5%	20.4%	21 2%	22.9%	16 3%

Q.50.b) Agreement - I could stop gambling for weeks without feeling the need to gamble.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.b) Agreement - I could stop gambling for weeks without feeling the need to gamble.	Strongly agree	891	421	191	111	119	470	212	132	126
		40 2%	34.9%	36 5%	30.7%	37 0%	46.7%	47 2%	44.1%	48 8%
	Agree	1057	608	249	200	159	449	205	133	111
		47.7%	50.3%	47 5%	55.2%	49.4%	44.6%	45.7%	44.5%	43 0%
	(Neither agree nor disagree)	191	123	60	31	32	68	22	30	16
		8 6%	10.2%	11 5%	8.6%	9 9%	6.8%	4 9%	10.0%	6 2%
	Disagree	54	38	19	9	10	16	7	4	5
		2.4%	3.1%	3 6%	2.5%	3.1%	1.6%	1 6%	1.3%	1 9%
	(Don't know/ can't say)	21	18	5	11	2	3	3	0	0
		9%	1.5%	1 0%	3.0%	6%	.3%	.7%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1948	1029	440	311	278	919	417	265	237
		88 8%	86.5%	84 8%	88.6%	86 9%	91.6%	93 5%	88.6%	91 9%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.50.c) Agreement - I could cut down easily on my gambling.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.c) Agreement - I could cut down easily on my gambling.	Strongly agree	784	366	168	96	102	418	195	120	103
		35.4%	30.3%	32.1%	26.5%	31.7%	41.6%	43.4%	40.1%	39 9%
	Agree	1207	720	300	227	193	487	214	142	131
		54 5%	59.6%	57 3%	62.7%	59 9%	48.4%	47.7%	47.5%	50 8%
	(Neither agree nor disagree)	169	94	44	32	18	75	29	27	19
		7 6%	7.8%	8.4%	8.8%	5 6%	7.5%	6 5%	9.0%	7.4%
	Disagree	31	18	9	2	7	13	7	4	2
		1.4%	1.5%	1.7%	.6%	2 2%	1.3%	1 6%	1.3%	8%
	(Don't know/ can't say)	22	10	3	5	2	12	3	6	3
		1 0%	.8%	6%	1.4%	6%	1.2%	.7%	2.0%	1 2%
	(Refuse)	1	0	0	0	0	1	1	0	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1991	1086	468	323	295	905	409	262	234
		90 9%	90.7%	89 8%	90.5%	92 2%	91.1%	91 9%	89.4%	91 8%

Q.50.d) Agreement - I feel angry when I lose at gambling.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.d) Agreement - I feel angry when I lose at gambling.	Strongly agree	196	103	49	28	26	93	53	25	15
		8 9%	8.5%	9.4%	7.7%	8.1%	9.2%	11 8%	8.4%	5 8%
	Agree	741	461	216	133	112	280	119	93	68
		33 5%	38.2%	41 2%	36.7%	34 8%	27.8%	26 5%	31.1%	26.4%
	(Neither agree nor disagree)	969	507	194	165	148	462	196	140	126
		43 8%	42.0%	37 0%	45.6%	46 0%	45.9%	43.7%	46.8%	48 8%
	Disagree	279	124	62	30	32	155	72	39	44
		12 6%	10.3%	11 8%	8.3%	9 9%	15.4%	16 0%	13.0%	17.1%
	(Don't know/ can't say)	28	13	3	6	4	15	8	2	5
		1 3%	1.1%	6%	1.7%	1 2%	1.5%	1 8%	.7%	1 9%
	(Refuse)	1	0	0	0	0	1	1	0	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		937	564	265	161	138	373	172	118	83
		42 9%	47.2%	50 9%	45.2%	43.4%	37.7%	39.1%	39.7%	32 8%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.50.e) Agreement - If you have never experienced the excitement of making a big bet, you have never really lived.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.e) Agreement - If you have never experienced the excitement of making a big bet, you have never really lived.	Strongly agree	24	15	9	3	3	9	4	2	3
		1.1%	1.2%	1.7%	.8%	9%	.9%	9%	.7%	1 2%
	Agree	240	149	73	43	33	91	44	26	21
		10 8%	12.3%	13 9%	11.9%	10 2%	9.0%	9 8%	8.7%	8.1%
	(Neither agree nor disagree)	1288	723	293	230	200	565	245	182	138
		58 2%	59.9%	55 9%	63.5%	62.1%	56.2%	54 6%	60.9%	53 5%
	Disagree	576	279	130	73	76	297	132	79	86
		26 0%	23.1%	24 8%	20.2%	23 6%	29.5%	29.4%	26.4%	33 3%
	(Don't know/ can't say)	83	41	19	13	9	42	23	10	9
		3.7%	3.4%	3 6%	3.6%	2 8%	4.2%	5.1%	3.3%	3 5%
	(Refuse)	3	1	0	0	1	2	1	0	1
		.1%	.1%	0 0%	0.0%	3%	.2%	2%	0.0%	.4%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		264	164	82	46	36	100	48	28	24
		12.4%	14.1%	16 2%	13.2%	11 5%	10.4%	11 3%	9.7%	9.7%

Q.50.f) Agreement - I don't like to quit when I'm losing.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.f) Agreement - I don't like to quit when I'm losing.	Strongly agree	69	37	21	5	11	32	18	8	6
		3.1%	3.1%	4 0%	1.4%	3.4%	3.2%	4 0%	2.7%	2 3%
	Agree	505	307	138	89	80	198	81	66	51
		22 8%	25.4%	26 3%	24.6%	24 8%	19.7%	18 0%	22.1%	19 8%
	(Neither agree nor disagree)	1226	664	282	211	171	562	252	174	136
		55.4%	55.0%	53 8%	58.3%	53.1%	55.9%	56.1%	58.2%	52.7%
	Disagree	370	175	74	47	54	195	87	49	59
		16.7%	14.5%	14.1%	13.0%	16 8%	19.4%	19.4%	16.4%	22 9%
	(Don't know/ can't say)	43	24	8	10	6	19	11	2	6
		1 9%	2.0%	1 5%	2.8%	1 9%	1.9%	2.4%	.7%	2 3%
	(Refuse)	1	1	1	0	0	0	0	0	0
		0%	.1%	2%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		574	344	159	94	91	230	99	74	57
		26 5%	29.1%	30 9%	26.7%	28 8%	23.3%	22 6%	24.9%	22 6%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.50.g) Agreement - If I have lost my bets recently, my luck is bound to change.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.g) Agreement - If I have lost my bets recently, my luck is bound to change.	Strongly agree	30	18	12	1	5	12	6	3	3
		1.4%	1.5%	2 3%	.3%	1 6%	1.2%	1 3%	1.0%	1 2%
	Agree	373	250	134	65	51	123	59	36	28
		16 8%	20.7%	25 6%	18.0%	15 8%	12.2%	13.1%	12.0%	10 9%
	(Neither agree nor disagree)	1383	743	306	233	204	640	282	202	156
		62 5%	61.5%	58.4%	64.4%	63.4%	63.6%	62 8%	67.6%	60 5%
	Disagree	378	173	63	52	58	205	88	53	64
		17.1%	14.3%	12 0%	14.4%	18 0%	20.4%	19 6%	17.7%	24 8%
	(Don't know/ can't say)	49	24	9	11	4	25	13	5	7
		2 2%	2.0%	1.7%	3.0%	1 2%	2.5%	2 9%	1.7%	2.7%
	(Refuse)	1	0	0	0	0	1	1	0	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		403	268	146	66	56	135	65	39	31
		18 6%	22.6%	28 3%	18.8%	17 6%	13.8%	14 9%	13.3%	12.4%

Q.50.h) Agreement - I have carried a lucky charm when I gambled.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.h) Agreement - I have carried a lucky charm when I gambled.	Strongly agree	23	14	11	2	1	9	5	1	3
		1 0%	1.2%	2.1%	.6%	3%	.9%	1.1%	.3%	1 2%
	Agree	157	107	46	32	29	50	23	13	14
		7.1%	8.9%	8 8%	8.8%	9 0%	5.0%	5.1%	4.3%	5.4%
	(Neither agree nor disagree)	1341	731	292	240	199	610	257	212	141
		60 6%	60.5%	55.7%	66.3%	61 8%	60.6%	57 2%	70.9%	54.7%
	Disagree	687	352	173	86	93	335	162	73	100
		31 0%	29.1%	33 0%	23.8%	28 9%	33.3%	36.1%	24.4%	38 8%
	(Don't know/ can't say)	6	4	2	2	0	2	2	0	0
		3%	.3%	.4%	.6%	0 0%	.2%	.4%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		180	121	57	34	30	59	28	14	17
		8 2%	10.0%	10 9%	9.4%	9 3%	5.9%	6 3%	4.7%	6 6%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.50.i) Agreement - If I were feeling down, gambling would probably pick me up.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.i) Agreement - If I were feeling down, gambling would probably pick me up.	Strongly agree	27	20	11	5	4	7	3	2	2
		1 2%	1.7%	2.1%	1.4%	1 2%	.7%	.7%	.7%	8%
	Agree	418	274	128	83	63	144	57	46	41
		18 9%	22.7%	24.4%	22.9%	19 6%	14.3%	12.7%	15.4%	15 9%
	(Neither agree nor disagree)	1188	649	268	204	177	539	246	169	124
		53.7%	53.7%	51.1%	56.4%	55 0%	53.6%	54 8%	56.5%	48.1%
	Disagree	557	250	109	66	75	307	139	79	89
		25 2%	20.7%	20 8%	18.2%	23 3%	30.5%	31 0%	26.4%	34 5%
	(Don't know/ can't say)	23	14	8	4	2	9	4	3	2
		1 0%	1.2%	1 5%	1.1%	6%	.9%	9%	1.0%	8%
	(Refuse)	1	1	0	0	1	0	0	0	0
		0%	.1%	0 0%	0.0%	3%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		445	294	139	88	67	151	60	48	43
		20 3%	24.6%	26 9%	24.6%	21 0%	15.1%	13 5%	16.2%	16 8%

Q.50.j) Agreement - Gambling is my best way to experience high sensation.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.50.j) Agreement - Gambling is my best way to experience high sensation.	Strongly agree	20	16	11	2	3	4	3	0	1
		9%	1.3%	2.1%	.6%	9%	.4%	.7%	0.0%	.4%
	Agree	155	105	57	25	23	50	26	14	10
		7 0%	8.7%	10 9%	6.9%	7.1%	5.0%	5 8%	4.7%	3 9%
	(Neither agree nor disagree)	1304	728	293	240	195	576	249	192	135
		58 9%	60.3%	55 9%	66.3%	60 6%	57.3%	55 5%	64.2%	52 3%
	Disagree	718	347	157	92	98	371	168	92	111
		32.4%	28.7%	30 0%	25.4%	30.4%	36.9%	37.4%	30.8%	43 0%
	(Don't know/ can't say)	17	12	6	3	3	5	3	1	1
		8%	1.0%	1.1%	.8%	9%	.5%	.7%	.3%	.4%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		175	121	68	27	26	54	29	14	11
		8 0%	10.1%	13.1%	7.5%	8 2%	5.4%	6 5%	4.7%	4 3%

GRA - ROLE OF LOYALTY PROGRAMS IN GAMBLING - REF: 2730 THREE WAVE LONGITUDINAL SURVEY

Q.51.a) Thinking about all of your gambling in the past 12 months - How often have you bet more than you could really afford to lose?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.a) Thinking about all of your gambling in the past 12 months - How often have you bet more than you could really afford to lose?	Never	1401	689	281	217	191	712	311	213	188
		63 3%	57.0%	53 6%	59.9%	59 3%	70.8%	69 3%	71.2%	72 9%
	Sometimes	619	412	188	119	105	207	100	56	51
		28 0%	34.1%	35 9%	32.9%	32 6%	20.6%	22 3%	18.7%	19 8%
	Most of the time	99	65	33	19	13	34	17	11	6
		4 5%	5.4%	6 3%	5.2%	4 0%	3.4%	3 8%	3.7%	2 3%
	Almost always	94	41	22	7	12	53	21	19	13
		4 2%	3.4%	4 2%	1.9%	3.7%	5.3%	4.7%	6.4%	5 0%
	(Don't know)	1	1	0	0	1	0	0	0	0
		0%	.1%	0 0%	0.0%	3%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		193	106	55	26	25	87	38	30	19
		8.7%	8.8%	10 5%	7.2%	7 8%	8.6%	8 5%	10.0%	7.4%

Q.51.b) Thinking about all of your gambling in the past 12 months - How often have you needed to gamble with larger amounts of money to get the same feeling of excitement?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.b) Thinking about all of your gambling in the past 12 months - How often have you needed to gamble with larger amounts of money to get the same feeling of excitement?	Never	1836	963	401	293	269	873	380	261	232
		82 9%	79.7%	76 5%	80.9%	83 5%	86.8%	84 6%	87.3%	89 9%
	Sometimes	297	204	102	57	45	93	49	26	18
		13.4%	16.9%	19 5%	15.7%	14 0%	9.2%	10 9%	8.7%	7 0%
	Most of the time	40	22	11	7	4	18	9	6	3
		1 8%	1.8%	2.1%	1.9%	1 2%	1.8%	2 0%	2.0%	1 2%
	Almost always	32	15	8	4	3	17	8	6	3
		1.4%	1.2%	1 5%	1.1%	9%	1.7%	1 8%	2.0%	1 2%
	(Don't know)	9	4	2	1	1	5	3	0	2
		.4%	.3%	.4%	.3%	3%	.5%	.7%	0.0%	8%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		72	37	19	11	7	35	17	12	6
		3 3%	3.1%	3 6%	3.0%	2 2%	3.5%	3 8%	4.0%	2 3%

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Q.51.c) Thinking about all of your gambling in the past 12 months - When you gambled, how often did you go back another day to try to win back the money you lost?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.c) Thinking about all of your gambling in the past 12 months - When you gambled, how often did you go back another day to try to win back the money you lost?	Never	1735	889	358	273	258	846	370	250	226
		78.4%	73.6%	68 3%	75.4%	80.1%	84.1%	82.4%	83.6%	87 6%
	Sometimes	399	271	139	80	52	128	66	39	23
		18 0%	22.4%	26 5%	22.1%	16.1%	12.7%	14.7%	13.0%	8 9%
	Most of the time	47	31	16	8	7	16	7	5	4
		2.1%	2.6%	3.1%	2.2%	2 2%	1.6%	1 6%	1.7%	1 6%
	Almost always	32	17	11	1	5	15	6	4	5
		1.4%	1.4%	2.1%	.3%	1 6%	1.5%	1 3%	1.3%	1 9%
	(Don't know)	1	0	0	0	0	1	0	1	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	0 0%	.3%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		79	48	27	9	12	31	13	9	9
		3 6%	4.0%	5 2%	2.5%	3.7%	3.1%	2 9%	3.0%	3 5%

Q.51.d) Thinking about all of your gambling in the past 12 months - How often have you borrowed money or sold anything to get money to gamble?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.d) Thinking about all of your gambling in the past 12 months - How often have you borrowed money or sold anything to get money to gamble?	Never	2036	1089	465	330	294	947	419	280	248
		92 0%	90.1%	88.7%	91.2%	91 3%	94.1%	93 3%	93.6%	96.1%
	Sometimes	155	107	52	30	25	48	24	17	7
		7 0%	8.9%	9 9%	8.3%	7 8%	4.8%	5 3%	5.7%	2.7%
	Most of the time	18	8	5	2	1	10	5	2	3
		8%	.7%	1 0%	.6%	3%	1.0%	1.1%	.7%	1 2%
	Almost always	4	3	1	0	2	1	1	0	0
		2%	.2%	2%	0.0%	6%	.1%	2%	0.0%	0 0%
	(Don't know)	1	1	1	0	0	0	0	0	0
		0%	.1%	2%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		22	11	6	2	3	11	6	2	3
		1 0%	.9%	1.1%	.6%	9%	1.1%	1 3%	.7%	1 2%

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Q.51.e) Thinking about all of your gambling in the past 12 months - How often have you felt that you might have a problem with gambling?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.e) Thinking about all of your gambling in the past 12 months - How often have you felt that you might have a problem with gambling?	Never	1679	850	360	259	231	829	375	239	215
		75 8%	70.4%	68.7%	71.5%	71.7%	82.4%	83 5%	79.9%	83 3%
	Sometimes	354	253	118	71	64	101	46	34	21
		16 0%	20.9%	22 5%	19.6%	19 9%	10.0%	10 2%	11.4%	8.1%
	Most of the time	70	48	19	16	13	22	12	3	7
		3 2%	4.0%	3 6%	4.4%	4 0%	2.2%	2.7%	1.0%	2.7%
	Almost always	110	56	26	16	14	54	16	23	15
		5 0%	4.6%	5 0%	4.4%	4 3%	5.4%	3 6%	7.7%	5 8%
	(Don't know)	1	1	1	0	0	0	0	0	0
		0%	.1%	2%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		180	104	45	32	27	76	28	26	22
		8.1%	8.6%	8 6%	8.8%	8.4%	7.6%	6 2%	8.7%	8 5%

Q.51.f) Thinking about all of your gambling in the past 12 months - How often has gambling caused you any health problems, including stress or anxiety?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.f) Thinking about all of your gambling in the past 12 months - How often has gambling caused you any health problems, including stress or anxiety?	Never	1884	1002	423	302	277	882	393	260	229
		85.1%	82.9%	80.7%	83.4%	86 0%	87.7%	87 5%	87.0%	88 8%
	Sometimes	230	149	73	44	32	81	40	24	17
		10.4%	12.3%	13 9%	12.2%	9 9%	8.1%	8 9%	8.0%	6 6%
	Most of the time	46	30	13	9	8	16	8	5	3
		2.1%	2.5%	2 5%	2.5%	2 5%	1.6%	1 8%	1.7%	1 2%
	Almost always	52	25	13	7	5	27	8	10	9
		2 3%	2.1%	2 5%	1.9%	1 6%	2.7%	1 8%	3.3%	3 5%
	(Don't know)	2	2	2	0	0	0	0	0	0
		.1%	.2%	.4%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		98	55	26	16	13	43	16	15	12
		4.4%	4.6%	5 0%	4.4%	4 0%	4.3%	3 6%	5.0%	4.7%

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Q.51.g) Thinking about all of your gambling in the past 12 months - How often have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.g) Thinking about all of your gambling in the past 12 months - How often have people criticized your betting or told you that you had a gambling problem, regardless of whether or not you thought it was true?	Never	1803	935	403	286	246	868	393	255	220
		81.4%	77.4%	76 9%	79.0%	76.4%	86.3%	87 5%	85.3%	85 3%
	Sometimes	334	225	98	64	63	109	46	37	26
		15.1%	18.6%	18.7%	17.7%	19 6%	10.8%	10 2%	12.4%	10.1%
	Most of the time	34	21	9	7	5	13	6	4	3
		1 5%	1.7%	1.7%	1.9%	1 6%	1.3%	1 3%	1.3%	1 2%
	Almost always	40	25	13	5	7	15	4	3	8
		1 8%	2.1%	2 5%	1.4%	2 2%	1.5%	9%	1.0%	3.1%
	(Don't know)	3	2	1	0	1	1	0	0	1
		.1%	.2%	2%	0.0%	3%	.1%	0 0%	0.0%	.4%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		74	46	22	12	12	28	10	7	11
		3 3%	3.8%	4 2%	3.3%	3.7%	2.8%	2 2%	2.3%	4 3%

Q.51.h) How often has your gambling caused any financial problems for you or your household?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.h) How often has your gambling caused any financial problems for you or your household?	Never	1870	988	414	304	270	882	392	261	229
		84 5%	81.8%	79 0%	84.0%	83 9%	87.7%	87 3%	87.3%	88 8%
	Sometimes	257	175	87	47	41	82	41	26	15
		11 6%	14.5%	16 6%	13.0%	12.7%	8.2%	9.1%	8.7%	5 8%
	Most of the time	41	24	13	7	4	17	7	5	5
		1 9%	2.0%	2 5%	1.9%	1 2%	1.7%	1 6%	1.7%	1 9%
	Almost always	45	20	9	4	7	25	9	7	9
		2 0%	1.7%	1.7%	1.1%	2 2%	2.5%	2 0%	2.3%	3 5%
	(Don't know)	1	1	1	0	0	0	0	0	0
		0%	.1%	2%	0.0%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		86	44	22	11	11	42	16	12	14
		3 9%	3.6%	4 2%	3.0%	3.4%	4.2%	3 6%	4.0%	5.4%

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Q.51.i) Thinking about all of your gambling in the past 12 months - How often have you felt guilty about the way you gamble or what happens when you gamble?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.51.i) Thinking about all of your gambling in the past 12 months - How often have you felt guilty about the way you gamble or what happens when you gamble?	Never	1436	703	282	220	201	733	326	218	189
		64 9%	58.2%	53 8%	60.8%	62.4%	72.9%	72 6%	72.9%	73 3%
	Sometimes	572	386	183	107	96	186	83	56	47
		25 8%	32.0%	34 9%	29.6%	29 8%	18.5%	18 5%	18.7%	18 2%
	Most of the time	88	58	28	20	10	30	17	8	5
		4 0%	4.8%	5 3%	5.5%	3.1%	3.0%	3 8%	2.7%	1 9%
	Almost always	118	61	31	15	15	57	23	17	17
		5 3%	5.0%	5 9%	4.1%	4.7%	5.7%	5.1%	5.7%	6 6%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
Amost always / Most of the time		206	119	59	35	25	87	40	25	22
		9 3%	9.9%	11 3%	9.7%	7 8%	8.6%	8 9%	8.4%	8 5%

Q.52. On how many days in the past 12 months did you binge on gambling – that is, spend a significantly larger than usual amount in a shorter than usual period of time?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.52. On how many days in the past 12 months did you binge on gambling – that is, spend a significantly larger than usual amount in a shorter than usual period of time?	None - have not binged on gambling in past 12 mths	1535	775	327	225	223	760	333	221	206
		69 3%	64.2%	62.4%	62.2%	69 3%	75.5%	74 2%	73.9%	79 8%
	Once	151	90	39	30	21	61	35	14	12
		6 8%	7.5%	7.4%	8.3%	6 5%	6.1%	7 8%	4.7%	4.7%
	Two to five times	292	192	91	52	49	100	48	31	21
		13 2%	15.9%	17.4%	14.4%	15 2%	9.9%	10.7%	10.4%	8.1%
	Six or more times	189	120	58	36	26	69	31	20	18
		8 5%	9.9%	11.1%	9.9%	8.1%	6.9%	6 9%	6.7%	7 0%
	(Don't know)	20	15	9	3	3	5	2	2	1
		9%	1.2%	1.7%	.8%	9%	.5%	.4%	.7%	.4%
	(Refused)	27	16	0	16	0	11	0	11	0
		1 2%	1.3%	0 0%	4.4%	0 0%	1.1%	0 0%	3.7%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.53. Which single gambling activity did you mostly play when you binged?

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE BINGED ON GAMBLING N PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		632	402	188	118	96	230	114	65	51
Q.53. Which single gambling activity did you mostly play when you binged?	Pokies	481	306	141	86	79	175	83	48	44
		76.1%	76.1%	75 0%	72.9%	82 3%	76.1%	72 8%	73.8%	86 3%
	Something other than the pokies	151	96	47	32	17	55	31	17	7
		23 9%	23.9%	25 0%	27.1%	17.7%	23.9%	27 2%	26.2%	13.7%
TOTAL		632	402	188	118	96	230	114	65	51
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.54.a) I enjoy my gambling but sometimes I gamble too much.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.a) I enjoy my gambling but sometimes I gamble too much.	Strongly agree	127	80	43	19	18	47	20	15	12
		5.7%	6.6%	8 2%	5.2%	5 6%	4.7%	4 5%	5.0%	4.7%
	Agree	557	390	180	114	96	167	75	47	45
		25 2%	32.3%	34.4%	31.5%	29 8%	16.6%	16.7%	15.7%	17.4%
	(Neither agree nor disagree)	27	15	7	5	3	12	7	5	0
		1 2%	1.2%	1 3%	1.4%	9%	1.2%	1 6%	1.7%	0 0%
	Disagree	1021	508	207	162	139	513	216	162	135
		46.1%	42.1%	39 5%	44.8%	43 2%	51.0%	48.1%	54.2%	52 3%
	Strongly disagree	479	213	86	61	66	266	130	70	66
		21 6%	17.6%	16.4%	16.9%	20 5%	26.4%	29 0%	23.4%	25 6%
	(Don't know/ can't say)	3	2	1	1	0	1	1	0	0
		.1%	.2%	2%	.3%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		684	470	223	133	114	214	95	62	57
		30 9%	39.0%	42 6%	36.8%	35.4%	21.3%	21 2%	20.7%	22.1%

Q.54.b) Sometimes I think I should cut down on my gambling.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.b) Sometimes I think I should cut down on my gambling.	Strongly agree	162	90	42	22	26	72	33	24	15
		7 3%	7.5%	8 0%	6.1%	8.1%	7.2%	7 3%	8.0%	5 8%
	Agree	573	400	177	136	87	173	76	54	43
		25 9%	33.1%	33 8%	37.6%	27 0%	17.2%	16 9%	18.1%	16.7%
	(Neither agree nor disagree)	22	13	6	3	4	9	4	4	1
		1 0%	1.1%	1.1%	.8%	1 2%	.9%	9%	1.3%	.4%
	Disagree	1059	535	224	161	150	524	225	159	140
		47 8%	44.3%	42.7%	44.5%	46 6%	52.1%	50.1%	53.2%	54 3%
	Strongly disagree	397	170	75	40	55	227	110	58	59
		17 9%	14.1%	14 3%	11.0%	17.1%	22.6%	24 5%	19.4%	22 9%
	(Don't know/ can't say)	1	0	0	0	0	1	1	0	0
		0%	0.0%	0 0%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		735	490	219	158	113	245	109	78	58
		33 2%	40.6%	41 8%	43.6%	35.1%	24.4%	24 3%	26.1%	22 5%

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Q.54.c) It's a waste of time thinking about my gambling.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.c) t's a waste of time thinking about my gambling.	Strongly agree	222	90	42	18	30	132	54	39	39
		10 0%	7.5%	8 0%	5.0%	9 3%	13.1%	12 0%	13.0%	15.1%
	Agree	1037	553	231	182	140	484	216	150	118
		46 8%	45.8%	44.1%	50.3%	43 5%	48.1%	48.1%	50.2%	45.7%
	(Neither agree nor disagree)	83	49	22	13	14	34	17	10	7
		3.7%	4.1%	4 2%	3.6%	4 3%	3.4%	3 8%	3.3%	2.7%
	Disagree	704	430	191	124	115	274	124	77	73
		31 8%	35.6%	36 5%	34.3%	35.7%	27.2%	27 6%	25.8%	28 3%
	Strongly disagree	142	72	30	23	19	70	32	20	18
		6.4%	6.0%	5.7%	6.4%	5 9%	7.0%	7.1%	6.7%	7 0%
	(Don't know/ can't say)	26	14	8	2	4	12	6	3	3
		1 2%	1.2%	1 5%	.6%	1 2%	1.2%	1 3%	1.0%	1 2%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1259	643	273	200	170	616	270	189	157
		57 5%	53.9%	52 9%	55.6%	53 5%	62.0%	60 9%	63.9%	61 6%

Q.54.d) I have just recently changed my gambling habits.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.d) I have just recently changed my gambling habits.	Strongly agree	104	65	24	20	21	39	15	14	10
		4.7%	5.4%	4 6%	5.5%	6 5%	3.9%	3 3%	4.7%	3 9%
	Agree	418	273	116	90	67	145	62	47	36
		18 9%	22.6%	22.1%	24.9%	20 8%	14.4%	13 8%	15.7%	14 0%
	(Neither agree nor disagree)	38	20	5	5	10	18	10	6	2
		1.7%	1.7%	1 0%	1.4%	3.1%	1.8%	2 2%	2.0%	8%
	Disagree	1290	700	308	205	187	590	260	177	153
		58 3%	57.9%	58 8%	56.6%	58.1%	58.6%	57 9%	59.2%	59 3%
	Strongly disagree	360	149	70	42	37	211	100	54	57
		16 3%	12.3%	13.4%	11.6%	11 5%	21.0%	22 3%	18.1%	22.1%
	(Don't know/ can't say)	2	0	0	0	0	2	2	0	0
		.1%	0.0%	0 0%	0.0%	0 0%	.2%	.4%	0.0%	0 0%
	(Refuse)	2	1	1	0	0	1	0	1	0
		.1%	.1%	2%	0.0%	0 0%	.1%	0 0%	.3%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		522	338	140	110	88	184	77	61	46
		23 6%	28.0%	26 8%	30.4%	27 3%	18.3%	17 2%	20.5%	17 8%

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Q.54.e) Anyone can talk about wanting to do something about gambling, but I am actually doing something about it.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.e) Anyone can talk about wanting to do something about gambling, but I am actually doing something about it.	Strongly agree	104	55	22	16	17	49	24	12	13
		4.7%	4.6%	4 2%	4.4%	5 3%	4.9%	5 3%	4.0%	5 0%
	Agree	576	353	139	110	104	223	92	72	59
		26 0%	29.2%	26 5%	30.4%	32 3%	22.2%	20 5%	24.1%	22 9%
	(Neither agree nor disagree)	171	83	40	24	19	88	41	28	19
		7.7%	6.9%	7 6%	6.6%	5 9%	8.7%	9.1%	9.4%	7.4%
	Disagree	1111	591	261	183	147	520	233	157	130
		50 2%	48.9%	49 8%	50.6%	45.7%	51.7%	51 9%	52.5%	50.4%
	Strongly disagree	190	86	39	22	25	104	52	20	32
		8 6%	7.1%	7.4%	6.1%	7 8%	10.3%	11 6%	6.7%	12.4%
	(Don't know/ can't say)	58	37	21	7	9	21	7	9	5
		2 6%	3.1%	4 0%	1.9%	2 8%	2.1%	1 6%	3.0%	1 9%
	(Refuse)	4	3	2	0	1	1	0	1	0
		2%	.2%	.4%	0.0%	3%	.1%	0 0%	.3%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		680	408	161	126	121	272	116	84	72
		31 6%	34.9%	32.1%	35.5%	38 8%	27.6%	26 2%	29.1%	28 5%

Q.54.f) My gambling is a problem sometimes.

			LPM	LPM			NON LPM	NON LPM	
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.f) My gambling is a problem sometimes.	Strongly agree	78	39	19	12	8	39	17	15	7
		3 5%	3.2%	3 6%	3.3%	2 5%	3.9%	3 8%	5.0%	2.7%
	Agree	362	257	118	72	67	105	41	35	29
		16.4%	21.3%	22 5%	19.9%	20 8%	10.4%	9.1%	11.7%	11 2%
	(Neither agree nor disagree)	24	14	6	7	1	10	6	3	1
		1.1%	1.2%	1.1%	1.9%	3%	1.0%	1 3%	1.0%	.4%
	Disagree	1114	617	260	193	164	497	219	151	127
		50 3%	51.1%	49 6%	53.3%	50 9%	49.4%	48 8%	50.5%	49 2%
	Strongly disagree	631	278	120	76	82	353	165	94	94
		28 5%	23.0%	22 9%	21.0%	25 5%	35.1%	36.7%	31.4%	36.4%
	(Don't know/ can't say)	3	1	0	1	0	2	1	1	0
		.1%	.1%	0 0%	.3%	0 0%	.2%	2%	.3%	0 0%
	(Refuse)	2	2	1	1	0	0	0	0	0
		.1%	.2%	2%	.3%	0 0%	0.0%	0 0%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		440	296	137	84	75	144	58	50	36
		19 9%	24.6%	26 2%	23.3%	23 3%	14.3%	12 9%	16.8%	14 0%

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Q.54.g) There is no need for me to think about changing my gambling

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.g) There is no need for me to think about changing my gambling.	Strongly agree	372	162	75	41	46	210	97	49	64
		16 8%	13.4%	14 3%	11.3%	14 3%	20.9%	21 6%	16.4%	24 8%
	Agree	1117	596	240	191	165	521	233	156	132
		50 5%	49.3%	45 8%	52.8%	51 2%	51.8%	51 9%	52.2%	51 2%
	(Neither agree nor disagree)	30	20	9	7	4	10	4	3	3
		1.4%	1.7%	1.7%	1.9%	1 2%	1.0%	9%	1.0%	1 2%
	Disagree	543	343	155	103	85	200	82	68	50
		24 5%	28.4%	29 6%	28.5%	26.4%	19.9%	18 3%	22.7%	19.4%
	Strongly disagree	147	83	42	19	22	64	32	23	9
		6 6%	6.9%	8 0%	5.2%	6 8%	6.4%	7.1%	7.7%	3 5%
	(Don't know/ can't say)	3	3	2	1	0	0	0	0	0
		.1%	.2%	.4%	.3%	0 0%	0.0%	0 0%	0.0%	0 0%
	(Refuse)	2	1	1	0	0	1	1	0	0
		.1%	.1%	2%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1489	758	315	232	211	731	330	205	196
		67.4%	63.0%	60 5%	64.3%	65 5%	72.7%	73.7%	68.6%	76 0%

Q.54.h) I am actually changing my gambling habits right now.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.h) I am actually changing my gambling habits right now.	Strongly agree	97	53	20	16	17	44	18	19	7
		4.4%	4.4%	3 8%	4.4%	5 3%	4.4%	4 0%	6.4%	2.7%
	Agree	464	316	134	101	81	148	59	44	45
		21 0%	26.2%	25 6%	27.9%	25 2%	14.7%	13.1%	14.7%	17.4%
	(Neither agree nor disagree)	55	27	15	6	6	28	12	11	5
		2 5%	2.2%	2 9%	1.7%	1 9%	2.8%	2.7%	3.7%	1 9%
	Disagree	1252	660	289	199	172	592	267	179	146
		56 5%	54.6%	55 2%	55.0%	53.4%	58.8%	59 5%	59.9%	56 6%
	Strongly disagree	336	144	61	37	46	192	91	46	55
		15 2%	11.9%	11 6%	10.2%	14 3%	19.1%	20 3%	15.4%	21 3%
	(Don't know/ can't say)	8	7	4	3	0	1	1	0	0
		.4%	.6%	8%	.8%	0 0%	.1%	2%	0.0%	0 0%
	(Refuse)	2	1	1	0	0	1	1	0	0
		.1%	.1%	2%	0.0%	0 0%	.1%	2%	0.0%	0 0%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		561	369	154	117	98	192	77	63	52
		25 5%	30.8%	29.7%	32.6%	30.4%	19.1%	17 2%	21.1%	20 2%

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Q.54.i) Gambling less would be pointless for me.

			LPM	LPM			NON LPM	NON LPM		
BASE: HAVE GAMBLED N THE PAST 12 MONTHS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
Q.54.i) Gambling less would be pointless for me.	Strongly agree	185	69	28	16	25	116	49	29	38
		8.4%	5.7%	5 3%	4.4%	7 8%	11.5%	10 9%	9.7%	14.7%
	Agree	881	427	168	140	119	454	209	132	113
		39 8%	35.3%	32.1%	38.7%	37 0%	45.1%	46 5%	44.1%	43 8%
	(Neither agree nor disagree)	96	59	23	20	16	37	17	12	8
		4 3%	4.9%	4.4%	5.5%	5 0%	3.7%	3 8%	4.0%	3.1%
	Disagree	846	540	259	151	130	306	137	89	80
		38 2%	44.7%	49.4%	41.7%	40.4%	30.4%	30 5%	29.8%	31 0%
	Strongly disagree	163	88	38	25	25	75	31	31	13
		7.4%	7.3%	7 3%	6.9%	7 8%	7.5%	6 9%	10.4%	5 0%
	(Don't know/ can't say)	39	23	7	9	7	16	5	6	5
		1 8%	1.9%	1 3%	2.5%	2 2%	1.6%	1.1%	2.0%	1 9%
	(Refuse)	4	2	1	1	0	2	1	0	1
		2%	.2%	2%	.3%	0 0%	.2%	2%	0.0%	.4%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%
% Strongly agree/Agree		1066	496	196	156	144	570	258	161	151
		49.1%	41.9%	38 0%	44.3%	45.7%	57.7%	58 2%	54.9%	59 9%

Q.55. Gender

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.55. Gender	Male	819	446	192	130	124	373	159	120	94
		37 0%	36.9%	36 6%	35.9%	38 3%	37.1%	35.4%	40.1%	36.4%
	Female	1394	763	331	232	200	631	289	179	163
		62 9%	63.1%	63 2%	64.1%	61.7%	62.7%	64.4%	59.9%	63 2%
	(Refuse)	3	1	1	0	0	2	1	0	1
		.1%	.1%	2%	0.0%	0 0%	.2%	2%	0.0%	.4%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.56. What is your age?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q 56 and Q57 combined - Age	18 to 24 yrs	138	83	45	21	17	55	33	13	9
		6 2%	6.9%	8 6%	5.8%	5 2%	5.5%	7 3%	4.3%	3 5%
	25 to 34 yrs	339	183	84	55	44	156	79	47	30
		15 3%	15.1%	16 0%	15.2%	13 6%	15.5%	17 6%	15.7%	11 6%
	35 to 44 yrs	312	143	77	36	30	169	70	55	44
		14.1%	11.8%	14.7%	9.9%	9 3%	16.8%	15 6%	18.4%	17.1%
	45 to 54 yrs	486	271	118	87	66	215	94	66	55
		21 9%	22.4%	22 5%	24.0%	20.4%	21.4%	20 9%	22.1%	21 3%
	55 to 64 yrs	475	263	100	81	82	212	93	58	61
		21.4%	21.7%	19.1%	22.4%	25 3%	21.1%	20.7%	19.4%	23 6%
	65 yrs or older	461	265	98	82	85	196	78	59	59
		20 8%	21.9%	18.7%	22.7%	26 2%	19.5%	17.4%	19.7%	22 9%
	Refused	5	2	2	0	0	3	2	1	0
		2%	.2%	.4%	0.0%	0 0%	.3%	.4%	.3%	0 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.58. What is the highest level of education you have completed?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.58. What is the highest level of education you have completed?	Year 9 or less	125	62	31	14	17	63	28	19	16
		5 6%	5.1%	5 9%	3.9%	5 2%	6.3%	6 2%	6.4%	6 2%
	Year 10	292	169	69	54	46	123	57	36	30
		13 2%	14.0%	13 2%	14.9%	14 2%	12.2%	12.7%	12.0%	11 6%
	Year 11	112	53	22	13	18	59	29	16	14
		5.1%	4.4%	4 2%	3.6%	5 6%	5.9%	6 5%	5.4%	5.4%
	Year 12	386	202	91	57	54	184	87	53	44
		17.4%	16.7%	17.4%	15.7%	16.7%	18.3%	19.4%	17.7%	17.1%
	Certificate / diploma / advanced diploma	709	385	170	102	113	324	133	94	97
		32 0%	31.8%	32.4%	28.2%	34 9%	32.2%	29 6%	31.4%	37 6%
	Bachelor degree or higher	536	311	139	99	73	225	110	61	54
		24 2%	25.7%	26 5%	27.3%	22 5%	22.4%	24 5%	20.4%	20 9%
	Other	5	2	0	1	1	3	0	2	1
		2%	.2%	0 0%	.3%	3%	.3%	0 0%	.7%	.4%
	(Missing - not asked)	32	15	0	15	0	17	0	17	0
		1.4%	1.2%	0 0%	4.1%	0 0%	1.7%	0 0%	5.7%	0 0%
	(Refuse)	19	11	2	7	2	8	5	1	2
		9%	.9%	.4%	1.9%	6%	.8%	1.1%	.3%	8%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.59. What is your main day-to- day activity?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.59. What is your main day-to- day activity?	Work full time or part time	1225	641	299	173	169	584	254	179	151
		55 3%	53.0%	57.1%	47.8%	52 2%	58.1%	56 6%	59.9%	58 5%
	Home duties	186	97	38	38	21	89	47	23	19
		8.4%	8.0%	7 3%	10.5%	6 5%	8.8%	10 5%	7.7%	7.4%
	Student	93	48	26	12	10	45	24	12	9
		4 2%	4.0%	5 0%	3.3%	3.1%	4.5%	5 3%	4.0%	3 5%
	Unemployed	91	50	23	15	12	41	18	8	15
		4.1%	4.1%	4.4%	4.1%	3.7%	4.1%	4 0%	2.7%	5 8%
	Retired	537	322	118	103	101	215	91	67	57
		24 2%	26.6%	22 5%	28.5%	31 2%	21.4%	20 3%	22.4%	22.1%
	Other	71	45	19	16	10	26	11	9	6
		3 2%	3.7%	3 6%	4.4%	3.1%	2.6%	2.4%	3.0%	2 3%
	(Refuse)	13	7	1	5	1	6	4	1	1
		6%	.6%	2%	1.4%	3%	.6%	9%	.3%	.4%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.60. What type of work do you do?

			LPM	LPM			NON LPM	NON LPM		
BASE: RESPONDENTS WHO WORK		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		1225	641	299	173	169	584	254	179	151
Q.60. What type of work do you do?	Manager	192	103	44	32	27	89	35	29	25
		15.7%	16.1%	14.7%	18.5%	16 0%	15.2%	13 8%	16.2%	16 6%
	Professional	332	182	78	51	53	150	56	44	50
		27.1%	28.4%	26.1%	29.5%	31.4%	25.7%	22 0%	24.6%	33.1%
	Technicians and trades workers	81	36	17	11	8	45	20	13	12
		6 6%	5.6%	5.7%	6.4%	4.7%	7.7%	7 9%	7.3%	7 9%
	Community and personal services worker	156	83	48	17	18	73	37	16	20
		12.7%	12.9%	16.1%	9.8%	10.7%	12.5%	14 6%	8.9%	13 2%
	Clerical and administrative worker	238	120	62	28	30	118	60	36	22
		19.4%	18.7%	20.7%	16.2%	17 8%	20.2%	23 6%	20.1%	14 6%
	Sales worker	110	57	22	18	17	53	23	18	12
		9 0%	8.9%	7.4%	10.4%	10.1%	9.1%	9.1%	10.1%	7 9%
	Machinery operators and drivers	41	21	9	7	5	20	9	8	3
		3 3%	3.3%	3 0%	4.0%	3 0%	3.4%	3 5%	4.5%	2 0%
	Labourers	67	39	19	9	11	28	14	10	4
		5 5%	6.1%	6.4%	5.2%	6 5%	4.8%	5 5%	5.6%	2 6%
	Other	8	0	0	0	0	8	0	5	3
		.7%	0.0%	0 0%	0.0%	0 0%	1.4%	0 0%	2.8%	2 0%
TOTAL		1225	641	299	173	169	584	254	179	151
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.61. What is your total annual household income before tax or anything else is taken out? Would it be ?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.61. What is your total annual household income before tax or anything else is taken out? Would it be ?	Negative or Zero income	8	6	4	2	0	2	2	0	0
		.4%	.5%	8%	.6%	0 0%	.2%	.4%	0.0%	0 0%
	Less than $20,000	148	85	32	32	21	63	31	16	16
		6.7%	7.0%	6.1%	8.8%	6 5%	6.3%	6 9%	5.4%	6 2%
	$20,000 to less than $40,000	407	232	92	73	67	175	80	51	44
		18.4%	19.2%	17 6%	20.2%	20.7%	17.4%	17 8%	17.1%	17.1%
	$40,000 to less than $60,000	330	173	72	50	51	157	63	55	39
		14 9%	14.3%	13.7%	13.8%	15.7%	15.6%	14 0%	18.4%	15.1%
	$60,000 to less than $80,000	280	138	65	42	31	142	60	42	40
		12 6%	11.4%	12.4%	11.6%	9 6%	14.1%	13.4%	14.0%	15 5%
	$80,000 to less than $100,000	209	115	48	29	38	94	46	26	22
		9.4%	9.5%	9 2%	8.0%	11.7%	9.3%	10 2%	8.7%	8 5%
	$100, 000 to less than $150,000	284	171	80	48	43	113	50	31	32
		12 8%	14.1%	15 3%	13.3%	13 3%	11.2%	11.1%	10.4%	12.4%
	$150,000 or more	184	96	42	27	27	88	44	25	19
		8 3%	7.9%	8 0%	7.5%	8 3%	8.7%	9 8%	8.4%	7.4%
	(Don't know)	170	87	52	19	16	83	31	27	25
		7.7%	7.2%	9 9%	5.2%	4 9%	8.3%	6 9%	9.0%	9.7%
	(Refuse)	196	107	37	40	30	89	42	26	21
		8 8%	8.8%	7.1%	11.0%	9 3%	8.8%	9.4%	8.7%	8.1%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.62. What is your total annual personal income before tax or anything else is taken out? Would it be ?

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.62. What is your total annual personal income before tax or anything else is taken out? Would it be ?	Negative or Zero income	69	32	18	9	5	37	18	9	10
		3.1%	2.6%	3.4%	2.5%	1 5%	3.7%	4 0%	3.0%	3 9%
	Less than $20,000	382	220	90	71	59	162	83	40	39
		17 2%	18.2%	17 2%	19.6%	18 2%	16.1%	18 5%	13.4%	15.1%
	$20,000 to less than $40,000	554	296	119	95	82	258	110	76	72
		25 0%	24.5%	22.7%	26.2%	25 3%	25.6%	24 5%	25.4%	27 9%
	$40,000 to less than $60,000	349	189	88	47	54	160	65	54	41
		15.7%	15.6%	16 8%	13.0%	16.7%	15.9%	14 5%	18.1%	15 9%
	$60,000 to less than $80,000	244	128	61	37	30	116	53	36	27
		11 0%	10.6%	11 6%	10.2%	9 3%	11.5%	11 8%	12.0%	10 5%
	$80,000 to less than $100,000	139	86	32	24	30	53	25	17	11
		6 3%	7.1%	6.1%	6.6%	9 3%	5.3%	5 6%	5.7%	4 3%
	$100, 000 to less than $150,000	91	50	32	10	8	41	19	10	12
		4.1%	4.1%	6.1%	2.8%	2 5%	4.1%	4 2%	3.3%	4.7%
	$150,000 or more	47	28	10	9	9	19	7	6	6
		2.1%	2.3%	1 9%	2.5%	2 8%	1.9%	1 6%	2.0%	2 3%
	(Don't know)	137	73	38	20	15	64	23	23	18
		6 2%	6.0%	7 3%	5.5%	4 6%	6.4%	5.1%	7.7%	7 0%
	(Refuse)	204	108	36	40	32	96	46	28	22
		9 2%	8.9%	6 9%	11.0%	9 9%	9.5%	10 2%	9.4%	8 5%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.63. Do you identify yourself as Aboriginal or Torres Strait Islander?

			LPM	LPM			NON LPM	NON LPM	
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q63 MULTI	Yes - Aboriginal	38	21	9	5	7	17	8	3	6
		1.7%	1.7%	1.7%	1.4%	2 2%	1.7%	1 8%	1.0%	2 3%
	Yes - Torres Strait Islander	6	3	2	0	1	3	1	2	0
		3%	.2%	.4%	0.0%	3%	.3%	2%	.7%	0 0%
	No - neither	2155	1180	509	356	315	975	432	292	251
		97 2%	97.5%	97.1%	98.3%	97 2%	96.9%	96 2%	97.7%	97 3%
	(Don't know)	3	0	0	0	0	3	1	1	1
		.1%	0.0%	0 0%	0.0%	0 0%	.3%	2%	.3%	.4%
	(Refuse)	14	6	4	1	1	8	7	1	0
		6%	.5%	8%	.3%	3%	.8%	1 6%	.3%	0 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Q.64. What is your postcode - detailed State breakdown

			LPM	LPM			NON LPM	NON LPM	
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
Q.64. What is your postcode?	ACT metro	2	2	1	0	1	0	0	0	0
		.1%	.2%	2%	0.0%	3%	0.0%	0 0%	0.0%	0 0%
	ACT non metro	24	12	4	4	4	12	6	4	2
		1.1%	1.0%	8%	1.1%	1 2%	1.2%	1 3%	1.3%	8%
	NSW metro	286	181	80	55	46	105	50	28	27
		12 9%	15.0%	15 3%	15.2%	14 2%	10.4%	11.1%	9.4%	10 5%
	NSW non metro	349	203	91	59	53	146	56	54	36
		15.7%	16.8%	17.4%	16.3%	16.4%	14.5%	12 5%	18.1%	14 0%
	VIC metro	542	285	134	83	68	257	121	77	59
		24 5%	23.6%	25 6%	22.9%	21 0%	25.5%	26 9%	25.8%	22 9%
	VIC non metro	367	173	77	52	44	194	83	58	53
		16 6%	14.3%	14.7%	14.4%	13 6%	19.3%	18 5%	19.4%	20 5%
	QLD metro	133	88	34	26	28	45	21	11	13
		6 0%	7.3%	6 5%	7.2%	8 6%	4.5%	4.7%	3.7%	5 0%
	QLD non metro	182	98	42	29	27	84	41	21	22
		8 2%	8.1%	8 0%	8.0%	8 3%	8.3%	9.1%	7.0%	8 5%
	SA metro	118	55	21	17	17	63	25	19	19
		5 3%	4.5%	4 0%	4.7%	5 2%	6.3%	5 6%	6.4%	7.4%
	SA non metro	50	14	6	4	4	36	13	10	13
		2 3%	1.2%	1.1%	1.1%	1 2%	3.6%	2 9%	3.3%	5 0%
	WA metro	34	29	10	9	10	5	3	0	2
		1 5%	2.4%	1 9%	2.5%	3.1%	.5%	.7%	0.0%	8%
	WA non metro	8	8	2	3	3	0	0	0	0
		.4%	.7%	.4%	.8%	9%	0.0%	0 0%	0.0%	0 0%
	TAS metro	16	13	5	4	4	3	1	2	0
		.7%	1.1%	1 0%	1.1%	1 2%	.3%	2%	.7%	0 0%
	TAS non metro	65	33	14	9	10	32	14	11	7
		2 9%	2.7%	2.7%	2.5%	3.1%	3.2%	3.1%	3.7%	2.7%
	NT metro	6	5	2	2	1	1	0	1	0
		3%	.4%	.4%	.6%	3%	.1%	0 0%	.3%	0 0%
	NT non metro	12	2	0	0	2	10	6	1	3
		5%	.2%	0 0%	0.0%	6%	1.0%	1 3%	.3%	1 2%
	(Refused)	22	9	1	6	2	13	9	2	2
		1 0%	.7%	2%	1.7%	6%	1.3%	2 0%	.7%	8%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Q.65. And what is your suburb or town? – Metro/Non-metro breakdown

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL RESPONDENTS		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
AREA	Metro	1137	658	287	196	175	479	221	138	120
		51 3%	54.4%	54 8%	54.1%	54 0%	47.6%	49 2%	46.2%	46 5%
	Non metro	1057	543	236	160	147	514	219	159	136
		47.7%	44.9%	45 0%	44.2%	45.4%	51.1%	48 8%	53.2%	52.7%
	(Refused)	22	9	1	6	2	13	9	2	2
		1 0%	.7%	2%	1.7%	6%	1.3%	2 0%	.7%	8%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Gender

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2213	1209	523	362	324	1004	448	299	257
GENDER	Male	819	446	192	130	124	373	159	120	94
		37 0%	36.9%	36.7%	35.9%	38 3%	37.2%	35 5%	40.1%	36 6%
	Female	1394	763	331	232	200	631	289	179	163
		63 0%	63.1%	63 3%	64.1%	61.7%	62.8%	64 5%	59.9%	63.4%
TOTAL		2213	1209	523	362	324	1004	448	299	257
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Age

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2211	1208	522	362	324	1003	447	298	258
AGE	18 to 44 yrs	789	409	206	112	91	380	182	115	83
		35.7%	33.9%	39 5%	30.9%	28.1%	37.9%	40.7%	38.6%	32 2%
	45+ yrs	1422	799	316	250	233	623	265	183	175
		64 3%	66.1%	60 5%	69.1%	71 9%	62.1%	59 3%	61.4%	67 8%
TOTAL		2211	1208	522	362	324	1003	447	298	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Education

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2160	1182	522	339	321	978	444	279	255
EDUCATION	Less than BA	1624	871	383	240	248	753	334	218	201
		75 2%	73.7%	73.4%	70.8%	77 3%	77.0%	75 2%	78.1%	78 8%
	BA or higher	536	311	139	99	73	225	110	61	54
		24 8%	26.3%	26 6%	29.2%	22.7%	23.0%	24 8%	21.9%	21 2%
TOTAL		2160	1182	522	339	321	978	444	279	255
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Household Income

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		1850	1016	435	303	278	834	376	246	212
HOUSEHOLD INCOME	Less than $80k	1173	634	265	199	170	539	236	164	139
		63.4%	62.4%	60 9%	65.7%	61 2%	64.6%	62 8%	66.7%	65 6%
	$80k or more	677	382	170	104	108	295	140	82	73
		36 6%	37.6%	39.1%	34.3%	38 8%	35.4%	37 2%	33.3%	34.4%
TOTAL		1850	1016	435	303	278	834	376	246	212
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Banner Demographics - Personal Income

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		1875	1029	450	302	277	846	380	248	218
PERSONAL NCOME	Less than $80k	1598	865	376	259	230	733	329	215	189
		85 2%	84.1%	83 6%	85.8%	83 0%	86.6%	86 6%	86.7%	86.7%
	$80k or more	277	164	74	43	47	113	51	33	29
		14 8%	15.9%	16.4%	14.2%	17 0%	13.4%	13.4%	13.3%	13 3%
TOTAL		1875	1029	450	302	277	846	380	248	218
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - State

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2194	1201	523	356	322	993	440	297	256
STATE	ACT	26	14	5	4	5	12	6	4	2
		1 2%	1.2%	1 0%	1.1%	1 6%	1.2%	1.4%	1.3%	8%
	NSW	635	384	171	114	99	251	106	82	63
		28 9%	32.0%	32.7%	32.0%	30.7%	25.3%	24.1%	27.6%	24 6%
	NT	18	7	2	2	3	11	6	2	3
		8%	.6%	.4%	.6%	9%	1.1%	1.4%	.7%	1 2%
	QLD	315	186	76	55	55	129	62	32	35
		14.4%	15.5%	14 5%	15.4%	17.1%	13.0%	14.1%	10.8%	13.7%
	SA	168	69	27	21	21	99	38	29	32
		7.7%	5.7%	5 2%	5.9%	6 5%	10.0%	8 6%	9.8%	12 5%
	TAS	81	46	19	13	14	35	15	13	7
		3.7%	3.8%	3 6%	3.7%	4 3%	3.5%	3.4%	4.4%	2.7%
	VIC	909	458	211	135	112	451	204	135	112
		41.4%	38.1%	40 3%	37.9%	34 8%	45.4%	46.4%	45.5%	43 8%
	WA	42	37	12	12	13	5	3	0	2
		1 9%	3.1%	2 3%	3.4%	4 0%	.5%	.7%	0.0%	8%
TOTAL		2194	1201	523	356	322	993	440	297	256
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Played pokies within past 3 months

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2210	1207	524	362	321	1003	447	299	257
PLAYED POKIES WITH N PAST 3 MONTHS	Played within past 3 months	1851	1088	495	322	271	763	364	218	181
		83 8%	90.1%	94 5%	89.0%	84.4%	76.1%	81.4%	72.9%	70.4%
	Not played within last 3 months	359	119	29	40	50	240	83	81	76
		16 2%	9.9%	5 5%	11.0%	15 6%	23.9%	18 6%	27.1%	29 6%
TOTAL		2210	1207	524	362	321	1003	447	299	257
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Played pokies within past 12 months

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
PLAYED POKIES WITH N PAST 12 MONTHS	Played within past 12 months	2213	1207	524	362	321	1006	449	299	258
		99 9%	99.8%	100 0%	100.0%	99.1%	100.0%	100 0%	100.0%	100 0%
	Not played within last 12 months	3	3	0	0	3	0	0	0	0
		.1%	.2%	0 0%	0.0%	9%	0.0%	0 0%	0.0%	0 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

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Banner Demographics - Problem Gambling Severity Index - broad

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
PROBLEM GAMBL NG SEVERITY NDEX - BROAD	No or low risk (PGSI score = 0-2)	1539	765	310	239	216	774	341	229	204
		69 5%	63.3%	59 2%	66.0%	67.1%	76.9%	75 9%	76.6%	79.1%
	Moderate risk or problem gambler (PGSI score = 3-27)	675	443	214	123	106	232	108	70	54
		30 5%	36.7%	40 8%	34.0%	32 9%	23.1%	24.1%	23.4%	20 9%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Problem Gambling Severity Index - detailed

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2214	1208	524	362	322	1006	449	299	258
PROBLEM GAMBL NG SEVERITY NDEX - DETA LED	No risk (PGSI score = 0)	1059	479	183	153	143	580	246	175	159
		47 8%	39.7%	34 9%	42.3%	44.4%	57.7%	54 8%	58.5%	61 6%
	Low risk (PGSI score = 1-2)	480	286	127	86	73	194	95	54	45
		21.7%	23.7%	24 2%	23.8%	22.7%	19.3%	21 2%	18.1%	17.4%
	Moderate risk (PGSI score = 3-7)	436	299	143	82	74	137	67	38	32
		19.7%	24.8%	27 3%	22.7%	23 0%	13.6%	14 9%	12.7%	12.4%
	Problem gambler (PGSI score = 8-27)	239	144	71	41	32	95	41	32	22
		10 8%	11.9%	13 5%	11.3%	9 9%	9.4%	9.1%	10.7%	8 5%
TOTAL		2214	1208	524	362	322	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Quota group played pokies - past 12 months

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2211	1205	524	360	321	1006	449	299	258
QUOTA GROUP PLAYED POKIES - PAST 12 MONTHS	Mod risk or PG + LPM	442	442	214	122	106	0	0	0	0
		20 0%	36.7%	40 8%	33.9%	33 0%	0.0%	0 0%	0.0%	0 0%
	Mod risk or PG + not LPM	232	0	0	0	0	232	108	70	54
		10 5%	0.0%	0 0%	0.0%	0 0%	23.1%	24.1%	23.4%	20 9%
	No or low risk + LPM	763	763	310	238	215	0	0	0	0
		34 5%	63.3%	59 2%	66.1%	67 0%	0.0%	0 0%	0.0%	0 0%
	No or low risk + not LPM	774	0	0	0	0	774	341	229	204
		35 0%	0.0%	0 0%	0.0%	0 0%	76.9%	75 9%	76.6%	79.1%
TOTAL		2211	1205	524	360	321	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Banner Demographics - Loyalty program member status

			LPM	LPM			NON LPM	NON LPM		
BASE: ALL ANSWERING		Total	Total	Wave 1	Wave 2	Wave 3	Total	Wave 1	Wave 2	Wave 3
Sample Size		2216	1210	524	362	324	1006	449	299	258
LOYALTY PROGRAM MEMBER STATUS	LPM	1210	1210	524	362	324	0	0	0	0
		54 6%	100.0%	100 0%	100.0%	100 0%	0.0%	0 0%	0.0%	0 0%
	Not a LPM	1006	0	0	0	0	1006	449	299	258
		45.4%	0.0%	0 0%	0.0%	0 0%	100.0%	100 0%	100.0%	100 0%
TOTAL		2216	1210	524	362	324	1006	449	299	258
		100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%	100.0%	100 0%

Appendix 10: SURVEY – Calculation of “High Success Loyalty Program” (HSLP) Variable

Computation of High Success Loyalty Program (HSLP) variable

Question	Pts
Q.26. When you signed up, did you receive information about…?	
How to get points	0.333
How many points you need to get rewards	0.333
What kinds of rewards you could get	0.333
A gambling help line number or other	0
Responsible gambling messages	0
(Didn't receive any info)	0
Anything else	0
(Don't know)	0
(Refuse)	0
	0.0-1.0
Q.27. When you signed up, did you get any points or rewards right away?	
Yes - points	0.5
Yes – (other) rewards	0.5
No	0
(Don't know)	0
(Refuse)	0
	0.0-1.0
Q.28. How often do you receive any communication connected to this loyalty program, beyond the initial signing up?	
Daily - Monthly	1.0
Quarterly - Never	0
(Don't know)	0
(Refuse)	0
	0.0-1.0
Q.30. Do those communications include…?	
A summary of your spending	-1.0
A summary of your points or tier level	0.5
Coupons	0.1
Information about special deals on meals or other **non**-gambling activities	0.1
Special deals on gambling (for ex, extra points; additional cash back)	0.1
Chance to win prize draws or information about prize draws	0.1
Information about special events or other events at the venue	0.1
Something else (Specify)	0
(Don't know)	0
(Refuse)	0
	-1.0-1.0

Q.33. Does your loyalty program have tiers?	
Yes	1.0
No	0
(Don't know)	0
(Refuse)	0
	0.0-1.0
Q.34. Do you accrue points with your loyalty program which you can then turn in for rewards?	
Yes	1.0
No	0
(Don't know)	0
(Refuse)	0
	0.0-1.0
Q.36. Which of the following types of rewards can you get through your loyalty program?	
Food or meals	.0769
Non-alcoholic drinks	.0769
Alcoholic drinks	.0769
Cash	.0769
Gambling credits	.0769
Gift cards (for ex, Myer/Coles)	.0769
Prizes (e.g. household goods)	.0769
Venue shop/merchandise	.0769
Entertainment (for ex, concerts or shows)	.0769
Accommodation	.0769
Special treatment by staff	.0769
Free/discounted parking	.0769
Something else (specify)	.0769
(Don't know)	0
(Refuse)	0
	0.0-1.0
TOTAL POSSIBLE SCORE	**-1.0-7.0**