



Australian Hotels Association – ATM Exclusion Research Research Findings

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Background

- Sweeney Research was commissioned to undertake research that evaluated two specific areas of these legislative changes, focusing on...
 - ATM self exclusion schemes
 - Methods of application for self-exclusion programs
- The research will form part of the AHA and GameCare's submission to the Productivity Commission which broadly forms the direction for the gaming environment for the next decade



Research Aim and Objectives

- The overall aim of the research, as defined in the brief, was...

Understand levels of support (amongst GameCare participants) for changes relating to the provision of ATMs and the structure of self-exclusion programs in NSW hotels



- Specific objectives of the study include...

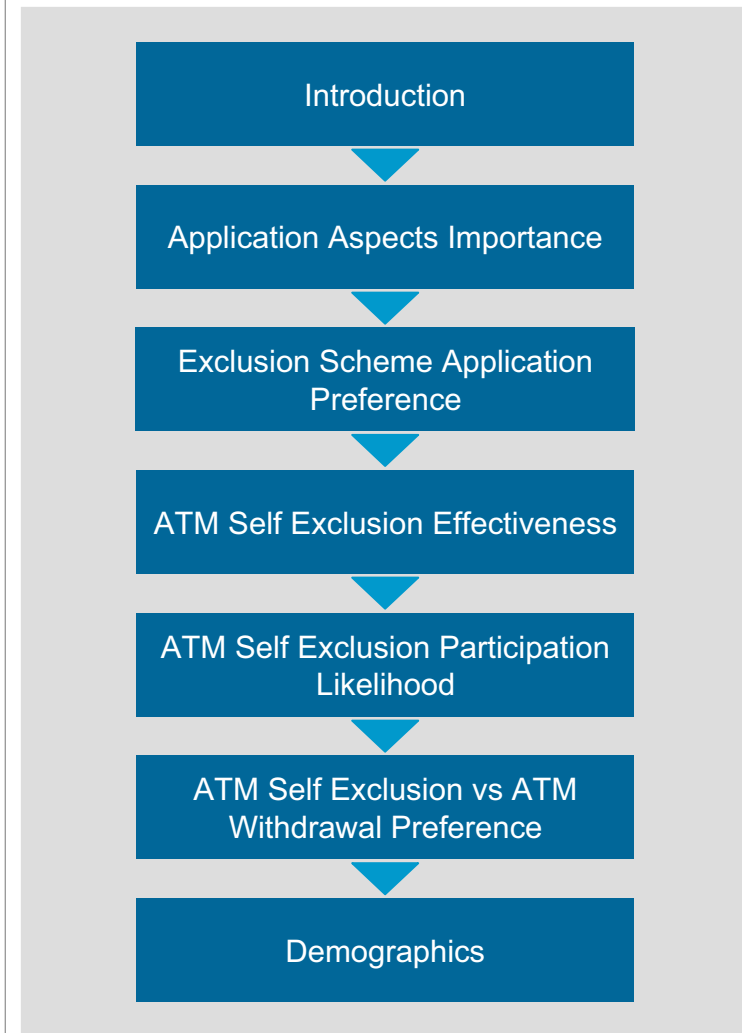
Understand appeal of proposed ATM exclusion	<ul style="list-style-type: none">▪ Understand appeal amongst GameCare participants of...<ul style="list-style-type: none">– a scheme where players can limit their daily withdrawal from ATMs located in specific licensed hotels– a scheme where players can prohibit the use of their debit cards in ATMs located in specific licensed hotels
Investigate likelihood to participate in program	<ul style="list-style-type: none">▪ Understand participants stated likelihood to participate in the proposed ATM exclusion programs
Self exclusion vs. ATM removal	<ul style="list-style-type: none">▪ Understand preference between self exclusion from specified ATMs and removal of ATMs from all licensed venues
Centralised vs. individual self exclusions	<ul style="list-style-type: none">▪ Assess preference for centralised applications for self exclusion programmes vs. individual hotel level applications

Research Methodology

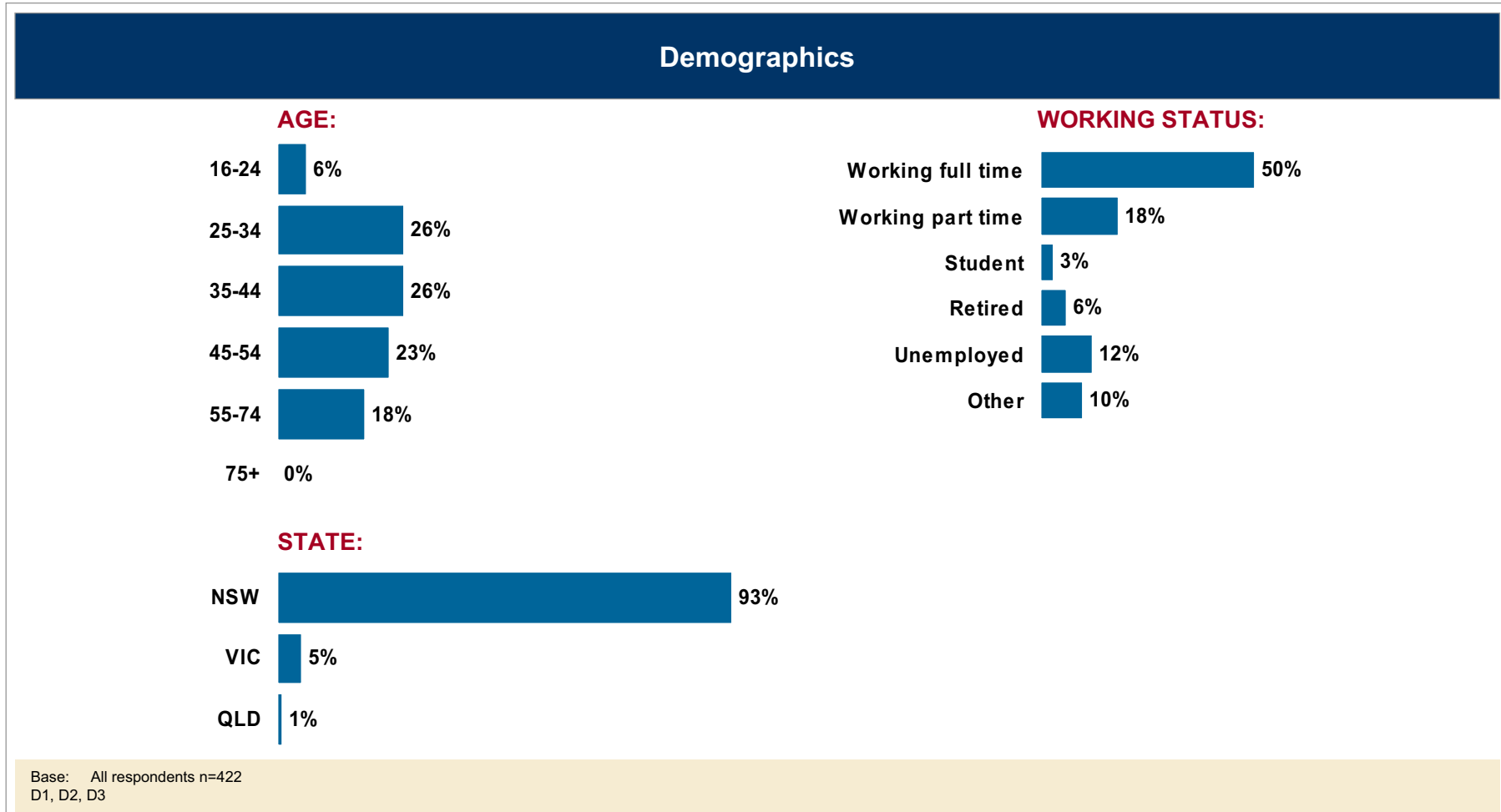
Approach

- Interviews conducted over the telephone using CATI (Computer Assisted Telephone Interviewing)
- Sample provided by GameCare...
 - All respondents were current/previous participants of GameCare self exclusion schemes
- 1,713 leads were provided by GameCare, from which 422 interviews were conducted between Friday 13th March and Tuesday 24th March 2009...
 - Each GameCare lead was called a minimum of 5 times to maximise contact opportunity
 - Represents 26% of sample
- Questionnaire length was 8 minutes
- There is no comprehensive profile data for GameCare participants. Data is therefore unweighted
- The approach was assessed and endorsed by an independent arbiter

Questionnaire Flow



Sample Profile

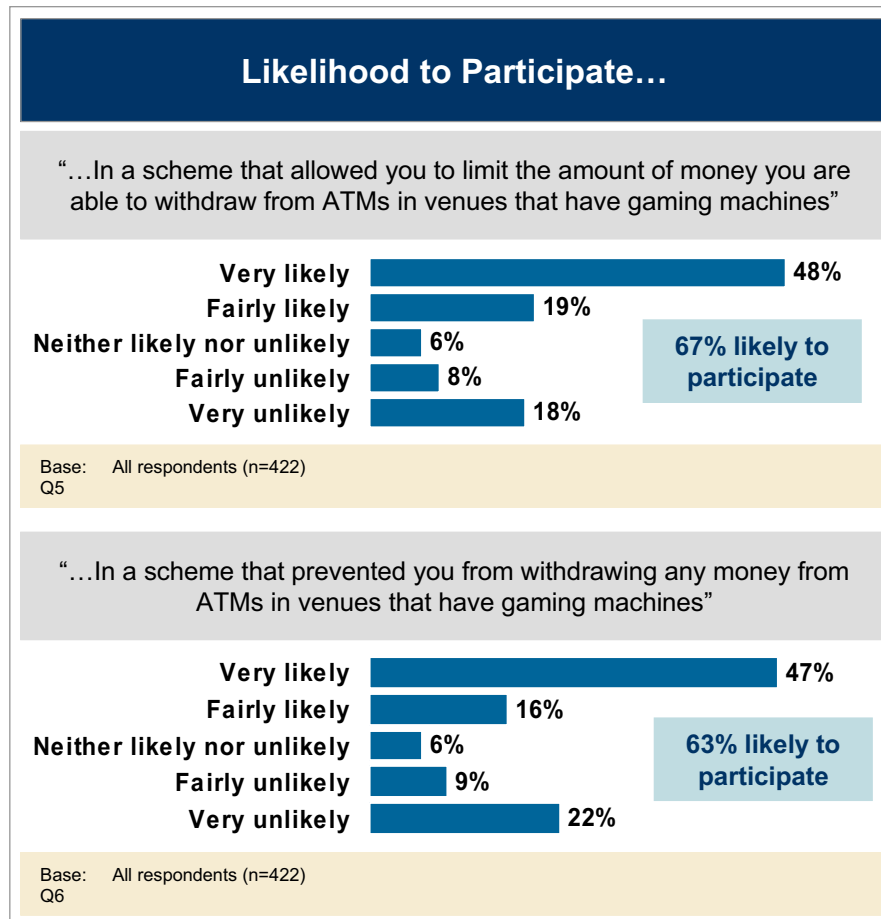
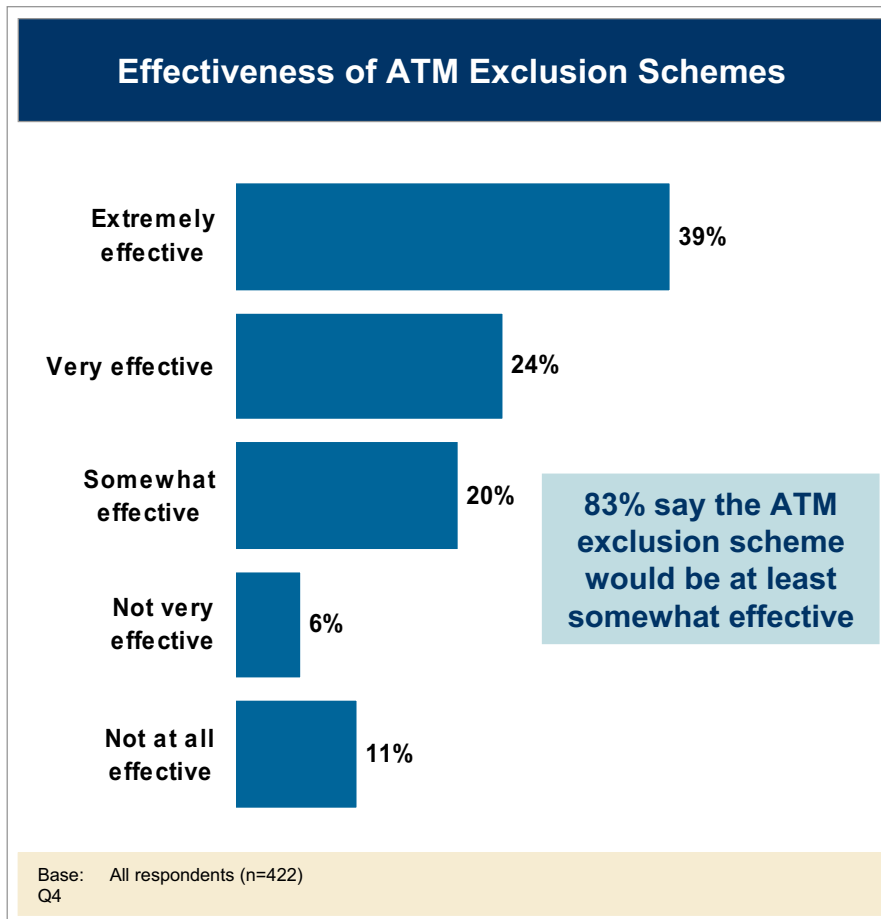


- Nearly all interviews (93%) conducted amongst NSW residents in line with GameCare’s strong presence in this state
- Half of respondents work full time
- Around a quarter of respondents in each of 25-34, 35-44 and 45-54 age categories

ATM Exclusion Scheme

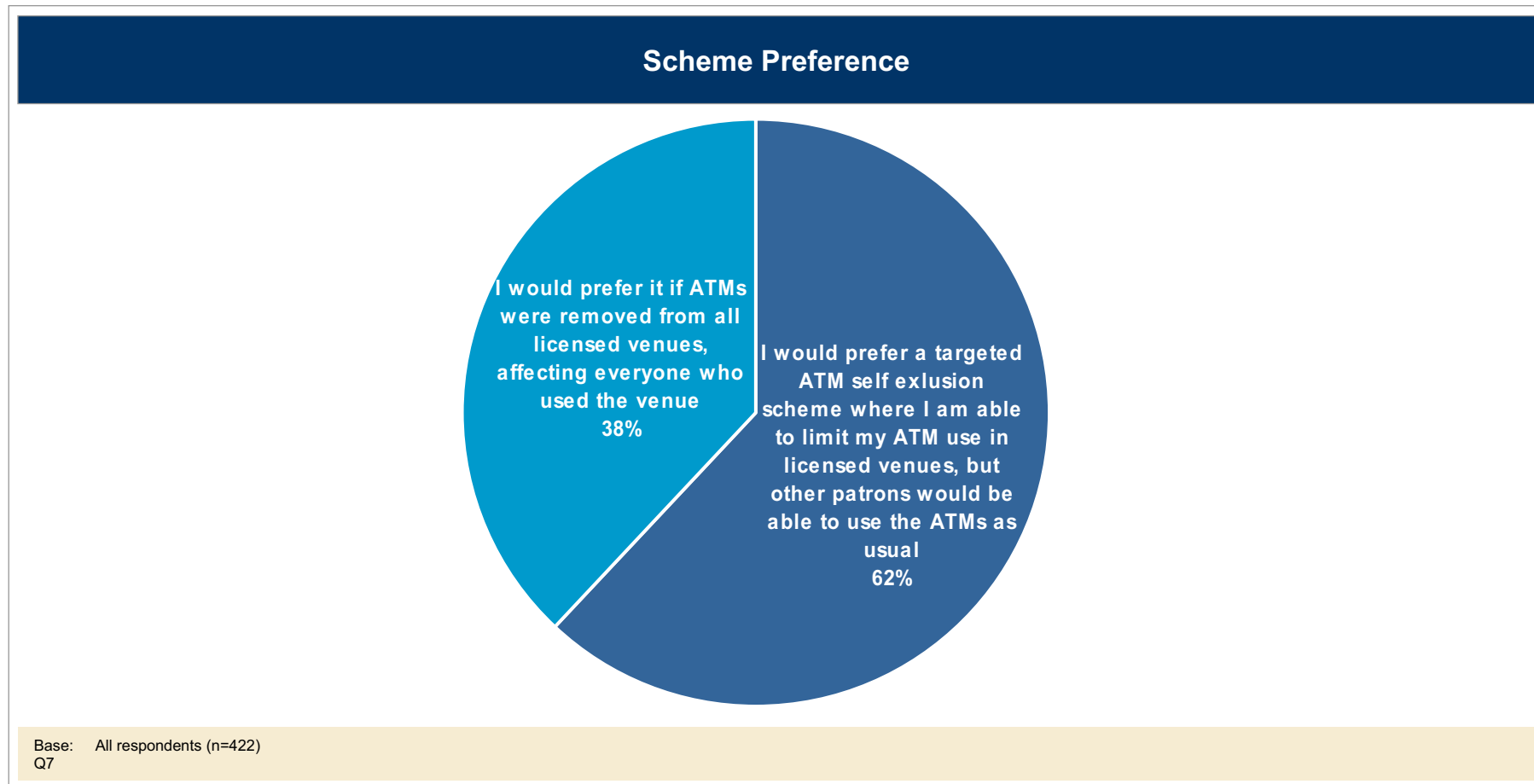


ATM Exclusion



- Overall, respondents believe ATM exclusion schemes would be an effective means of helping problem gamblers control their gambling...
 - Around two fifths (39%) say they would be extremely effective
 - A further 24% say they would be very effective
- There is a strong level of interest shown in ATM self exclusion schemes by around half of respondents...
 - 48% say they are very likely to participate in a scheme that *limits* ATM withdrawals
 - 47% say they are very likely to participate in a scheme that *prevents* ATM withdrawals

ATM Exclusion: Scheme Preference

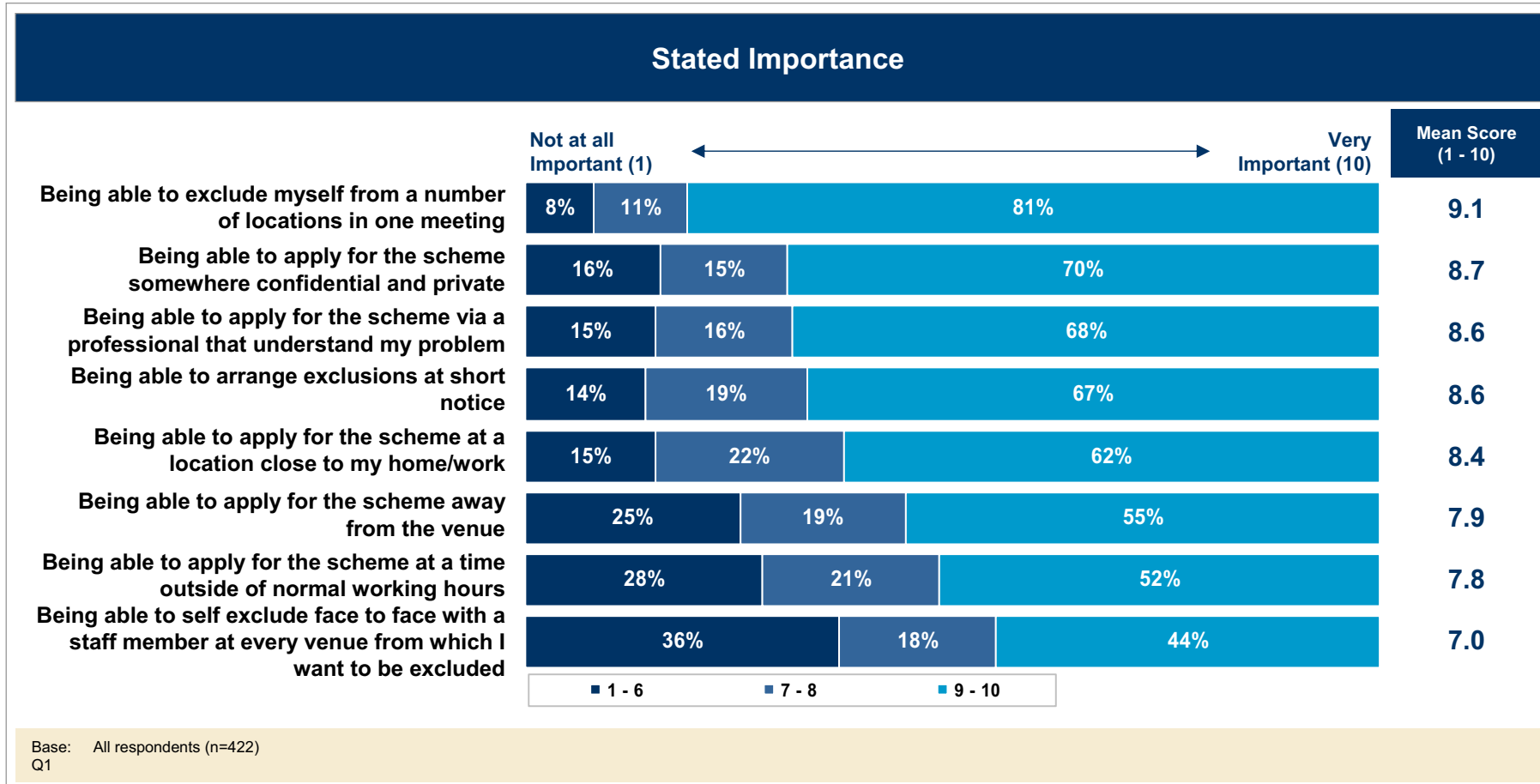


- In general, a self exclusion scheme that limits ATM usage is preferred to a scheme that removes ATM machines from all licensed venues (by 62% to 38%)

Applying for Self Exclusion Schemes

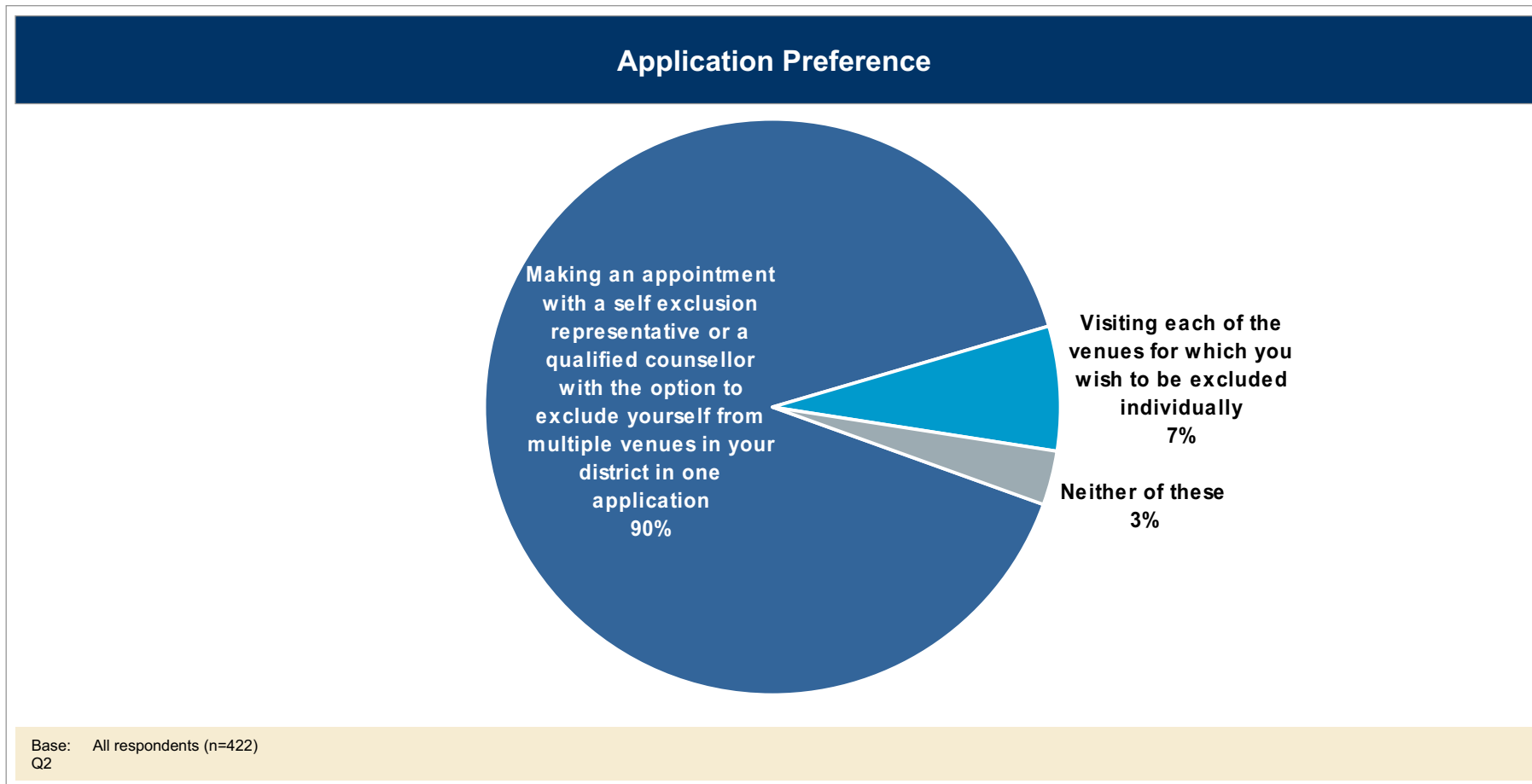


Methods of Applying for Self Exclusion



- The most important factor when considering a self exclusion scheme is being able to exclude from multiple locations in one meeting – 81% rate this factor 9 or 10 / 10 (on a 1 – 10 scale where 1 is not at all important and 10 is very important)
- Other factors that are important to current/potential self exclusion applicants include...
 - Applying somewhere confidential and private (70%, 9+/10)
 - Applying via a professional (68%, 9+/10)
 - Arranging exclusions at short notice (67%, 9+/10)
 - Being able to apply at a location close to home/work (62%, 9+/10)

Preferred Application Method



- A clear majority (90%) say they would prefer to apply for self exclusion from multiple venues via a single application
- Just 7% say they would rather visit each venue individually

Questionnaire



THANK YOU



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