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Hotel and Club Industry Gaming Impact Study

Final Report
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EXECUTIVE SUMMARY

This report presents the findings of the Hotel and Club Industry Gaming Impact Study. The broad objective of the project is to understand the impact of the introduction of Electronic Gaming Machines (EGMs) on the hotel and club industry.

This project is intended to retain comparability with the report “Community Facilities Resulting from the Providers of Gaming in Victoria (October 1997)” whilst being extended to include comparisons with non-gaming hotels and clubs. The project also aims to address additional objectives relating to the impact of EGMs on related industries, in particular, the music and entertainment industry and on other suppliers to hotels and clubs.

Methodology

The **initial** stage of the research program comprised a **qualitative** investigation including a literature search, focus groups amongst venue patrons and in-depth telephone interviews with venue managers, entertainers/agents, restaurants, suppliers and community organisations. The results of the preliminary stage were used as background information in designing questionnaires for the quantitative surveys. Relevant qualitative results have been incorporated into this report where applicable.

The **second** stage of the research project incorporated **five** separate **quantitative** studies comprising surveys with venue managers, patrons, entertainers/agents, beneficiaries of contributions and suppliers to the hotel and club industry.

The venue survey is the fourth survey of **gaming** venues. A database of all licensed hotel and club venues was provided by Liquor Licensing Victoria. Gaming venues were then flagged from information provided by the Victorian Casino and Gaming Authority (the Authority). In early July 1999, all **gaming** venues and a random selection of approximately half of all **non-gaming** venues were mailed a self-completion questionnaire. Those failing to respond to a reminder call, were again contacted and allowed the additional option of completing an interview by telephone. By the end of September, a total of **698 venues** had completed a survey, with an overall response rate of 47.7%.

During July 1999, a total of **454 interviews** were conducted by telephone with **patrons** who had visited a hotel or club in the past six months. The sample was randomly selected from the Victorian electronic white pages.

A total of **51 telephone interviews** were conducted with **entertainers** and **agents** of entertainers who have worked in the hotel and club industry. The sample was selected from the electronic white pages and was supplemented by a database obtained from a major Melbourne music store.

A total of **34 telephone interviews** were conducted with organisations nominated as being **beneficiaries** of contributions from hotels and clubs. The sample for this survey was obtained from organisations nominated by hotels and clubs responding to the Venue Survey.

A total of **33 telephone interviews** were conducted with managers of organisations who **supply** to the hotel and club industry. A random sample of suppliers was obtained from the electronic white pages.

Key Findings

Trading Experiences & Expectations

- In general, gaming venues were more likely than non-gaming venues to report an improved trading position at June 1998 compared with at June 1997, with 76% of all gaming venues reporting their trading position as being either significantly or marginally better compared to 51% of non-gaming venues.
- The main reasons reported by gaming venues for an improved trading position were improved facilities and the introduction of EGMs, whereas non-gaming venues were more likely to attribute their improvement to greater promotion or marketing.
- In regards to their expected trading position for the next financial year (1999/2000), gaming venues appear to be more optimistic than non-gaming venues. Over 80% of gaming venues expect their trading position to improve compared to 56% of non-gaming venues.
- A higher proportion of non-gaming venues (22%) than gaming venues (9%) reported a decline in patronage in 1998 when compared to 1997.
- On average, gaming venues appear to have experienced a significant increase in gross income in all trade areas, particularly in their bar and meals trade, since becoming operational gaming venues.
- Since the introduction of EGMs into Victoria, many non-gaming venues reported a significant decline in their gross income from the bar, meals and entertainment trade areas. Non-gaming hotels were more likely than non-gaming clubs to report a decline in gross income since the introduction of EGMs in Victoria.
- Gaming venues are more likely than non-gaming venues to subsidise their bar and meals trade. Whereas, non-gaming hotels are just as likely as gaming clubs to subsidise entertainment at their venue.
- In the 1997/1998 financial year, gaming hotels reported a much higher average annual gross income than gaming clubs ($3.4 million and $1.2 million respectively). In contrast, non-gaming venues reported an average annual gross income at a lower level than gaming venues ($680k for non-gaming hotels and $200k for non-gaming clubs).
- Amongst gaming venues, gaming income represented a lower proportion of income for hotels than for clubs (33% and 59% respectively for the 1997/1998 financial year). This high proportion of income from gaming is consistent with reports from gaming venues, particularly clubs, that they have suffered or could suffer dramatic financial hardship upon removal of EGMs.
- On average, gaming venues have longer hours of operation than non-gaming venues. Gaming hotels have by far the longest hours of operation, with average opening hours of 136 hours per week.
- The majority of gaming venues have extended their hours of operation since becoming an operational gaming venue (around 8 in 10), with an average increase of 30 hours a week. In comparison, 17% of non-gaming hotels and only 7% of non-gaming clubs have extended their hours of operation since the introduction of EGMs into Victoria in July 1992.

Venue Expenditure on Buildings and Facilities

- Gaming venues are more likely than non-gaming venues to have made improvements to buildings or facilities in 1997 or 1998. They were also more likely to have planned expenditure on projects to be commenced in 1999 or 2000.
- In comparison to gaming venues, non-gaming venues spent considerably less on new building projects and facility improvements or renovations in 1997/1998. Gaming venues also plan to spend more on projects planned to be commenced in 1999 or 2000.
- Approximately 60% of gaming venues had made improvements to buildings or facilities in 1997 or 1998. In comparison, only 41% of non-gaming clubs and 34% of non-gaming hotels had made such improvements during that time.
- Similarly 60% of gaming venues plan to make improvements to buildings or facilities in 1999 or 2000. In comparison, 46% of non-gaming clubs and 41% of non-gaming plan to make such improvements in 1999 or 2000.
- The majority of gaming venues reported that expenditure on building and facilities was attributable to the installation of EGMs. Whereas, only a small proportion of non-gaming venues attribute expenditure on improvements to competition from gaming venues.

Impact of the Introduction of EGMs on Hotel and Club Facilities

- Overall, gaming venues were more likely than non-gaming venues to report an improvement in the facilities offered at their venue, particularly improvements in dining opportunities and the quality of internal facilities. A substantial proportion of non-gaming venues reported a decline in the facilities offered, particularly opportunities for dining and entertainment.
- Approximately 83% of gaming venues reported an improvement in opportunities for **dining**, compared to 24% of non-gaming venues. Although amongst non-gaming venues, 34% of hotels and 18% of clubs reported a decline in dining opportunities.
- A higher proportion of gaming venues than non-gaming venues reported an improvement in the quality of **internal facilities** (88% versus 34%). The main improvements reported by gaming venues were major renovations and refurbishment, whereas non-gaming venues were more likely to have completed minor renovations such as painting and maintenance.
- Gaming hotels were the most likely to report improvements in **accommodation** opportunities (42%). Approximately 16% of non-gaming hotels reported a decline in accommodation.
- Improvements to facilities, such as the addition of function rooms, has made gaming venues more appropriate for **conferences**.
- There was little difference between gaming and non-gaming clubs in the improvement of **sporting** facilities (67% versus 64%).

- Gaming clubs (64%) were more likely than non-gaming clubs (24%) to report an improvement in the **social element** of the venue. Approximately 22% of non-gaming clubs reported a decline in the social element which was attributed to a decline in patronage or membership.
- Gaming clubs (64%) were the most likely to report an improvement in **entertainment**. Nearly a third of non-gaming hotels reported a decline in opportunities for entertainment.
- Gaming clubs were the most likely to report that they provide **live entertainment** (67% versus 43% for gaming hotels). In comparison, 52% of non-gaming hotels and only 19% of non-gaming clubs provide live entertainment.
- Entertainers and agents of entertainers were more likely to have reported a decline in opportunities for live entertainers at gaming hotels (65%) than non-gaming hotels (49%). A third of entertainers or agents reported a decline in opportunities at clubs.
- Entertainers and agents were most likely to report improvements in opportunities for live entertainers at gaming clubs (41%).

Impact of Introduction of EGMs on Market Profile

- The profile of patrons who visit non-gaming hotels is characterised by a higher than average proportion of males, younger age groups and young singles. In contrast, gaming hotels have a lower than average representation of young singles and gaming clubs have an above average representation of people over 65 years of age and older couples.
- Non-gaming hotels have a lower than average proportion of patrons not employed in the work force. In contrast, gaming clubs have a higher than average representation of people not in the work force.
- An increase in female patronage was reported by each venue type, although by a higher proportion of gaming venues (20%) than non-gaming venues (10%). Gaming hotels also noticed an increase in older patrons (30%). Gaming clubs reported an increase in gaming and non members (34%). Non-gaming venues reported an increase in people who dislike EGMs (22%), but a decrease in the number of patrons overall (15%).
- Patrons who visit gaming venues most often were more likely than non-gaming patrons to report an increase in patronage of hotels and clubs since the introduction of EGMs into Victoria.
- Many gaming venues reported attempting to attract older patrons since becoming an operational gaming venue. Other target markets reported by gaming hotels include families or couples and middle aged people. Gaming clubs have attempted to attract members of sporting clubs.
- The main target market of non-gaming venues are younger people and non-gaming clubs have attempted to attract members from other sporting clubs. Special functions and events and also the bar and dining trade areas have been promoted in an attempt to attract new patrons to non-gaming venues.

External Impacts

- Of those venues that had extended their trading hours, the majority reported it as having a positive impact on their venue.
- Gaming venues were most likely to report changes in patron leisure patterns and preferences and the development of the area as a tourist destination as having a positive impact. In addition, gaming hotels reported an ageing society as having a positive impact.
- The main aspect reported by non-gaming hotels as having a positive impact, other than extended trading hours, was the development of the area as a tourist destination. Venues in country areas (52%) were more likely than metropolitan venues (36%) to report that the development of the area as a tourist destination has had a positive impact.
- The aspects nominated by a high proportion of gaming venues as having a negative impact on their business are competition from other gaming venues and the extended trading hours of other venues.
- Approximately 46% of non-gaming hotels perceive competition from gaming venues to have had a negative impact on their business. Other aspects reported by non-gaming hotels as having a negative impact on their business include the general economic condition (43%), changes in attitudes to drink driving (53%) and changes in alcohol consumption patterns (43%).
- In regards to the recent changes in liquor licensing laws to allow alcohol to be served at restaurants without food, about 4 in 10 of both non-gaming hotels and gaming hotels believe this will have a negative impact on their venue, as restaurants and cafés are now seen as "another competitor in the market".
- Of those patrons who visit non-gaming venues most often, 26% reported that the increase in the number of theme pubs had contributed to an increase in visitation to hotels and clubs. A similar proportion reported that extended trading had increased their visitation.
- The main aspect associated with a decrease in non-gaming patron visitation to hotels and clubs is personal lifestyle changes (35%). Amongst non-gaming patrons about 2 in 10 reported the introduction of EGMs into Victoria has contributed to a decrease in visitation. A similar proportion reported that attitudes to drink driving also contributed to a decrease in visitation.
- A third of gaming patrons reported that the introduction of EGMs into Victoria had contributed to an increase in their visitation to hotels and clubs.
- The main aspects reported by entertainers and agents as having a positive impact on opportunities for live entertainers at hotels and clubs include an increase in the number of theme pubs (57%) and extended trading hours (45%). The aspect most associated with a decline in opportunities for live entertainers at hotels and clubs is the ageing of society (26%).

Contributions to the Community

- Both gaming and non-gaming venues make substantial contributions to their local community. However, there are indications that an increase in revenue from EGMs has allowed gaming venues, particularly clubs, to pay substantially higher dollar value contributions to the community than non-gaming venues.
- Approximately 86% of gaming hotels and 91% of gaming clubs reported making some sort of contribution to the community in 1998. In comparison, 80% of non-gaming hotels and 56% of non-gaming clubs reported making contributions in 1998.
- The majority of beneficiaries reported no change in the level of contributions made to their organisation since the introduction of EGMs into Victoria (61%). Approximately 12% of beneficiaries reported an increase in contributions.
- Approximately one fifth of beneficiaries perceive gaming venues to be more willing to give contributions and give a greater level of contributions than non-gaming venues, although the majority perceive no difference.
- In addition to voluntary contributions made to the community by hotels and clubs, community benefits are also received through the Community Support Fund. To date Community Support Fund projects to the value of $493,379,148 have been announced. Over a quarter of funds have been used for sport and recreation projects. Other types of projects funded include initiatives to address problem gambling, drug initiatives, families in crisis, youth, arts, and tourism. The research program of the Authority, which includes this particular research project, is also funded by the Community Support Fund.

CONCLUSION

The aim of this study was to provide further insight into the impact on the hotel and club industry, resulting from the introduction of increased gaming opportunities in Victoria.

Gaming Venues

The results have clearly indicated that **gaming** venues have benefited from increased revenue and patronage since they became operational gaming venues. The increase in revenue comes not only from gaming revenue, but also an increase in revenue from bar trade and dining areas. Gaming venues have also noticed a change in the types of patrons visiting their venues. In particular, gaming venues report an increase in patronage from older age groups and gaming clubs report an increase in patronage by non members. Gaming venues have also seen an increase in the number of female patrons, although this type of increase was reported by all venue types (both gaming and non gaming).

As a consequence of the increased revenue and patronage (due to the introduction of EGMs), **gaming** venues have been able to make substantial improvements to their buildings and facilities. The main types of improvements have been major refurbishments and renovations mostly focused on extension to gaming areas but also including bar, dining areas and function rooms for the larger venues. In addition, gaming clubs also focused on improvements and extensions to member areas and sporting facilities.

In addition, the majority of gaming venues have substantially increased their trading hours (especially hotels where a large proportion are also open 24 hours at least one day per week). This extension to trading hours has increased the opportunity for patrons to experience these improved facilities.

The **gaming** venues believe that they have provided improved opportunities for patrons at their venues in terms of dining and better quality facilities. In addition, gaming clubs also feel that they offer improved opportunities for socialising. In terms of live entertainment, gaming venues (especially clubs) believe that they are offering improved opportunities for their patrons. However, patrons appear to have a mixed opinion about the improvement in opportunities for entertainment at gaming venues. Furthermore, entertainers clearly feel that their opportunities for work at gaming venues have declined since the introduction of EGMs (especially at gaming hotels).

Whilst gaming hotels are obligated to indirectly contribute to the community via the Community Support Fund, gaming venues are also active in contributing to the community with gaming clubs contributing the highest dollar value of all venue types. Donations are the most likely type of contributions.

It should also be noted that gaming **clubs** are much more dependent than gaming hotels on the revenue they receive from EGMs because it contributes a higher proportion of their total revenue. Given that EGM revenue has allowed clubs to commence much improved facilities for club members, the possibility to some clubs of losing EGMs has now become a major concern.

Non-gaming Venues

The results indicate that since the introduction of EGMs into Victoria, some **non-gaming** venues have seen marginal increases in revenue and patronage. However, non-gaming venues are more likely to have reported decreases in both revenue and patronage than gaming venues. The decreases in revenue are most likely to have come from bar trade and dining areas (especially at hotels). Although most non-gaming venues were unlikely to have noticed a change in their patron profile, some venues have noticed an increase in patrons who wish to avoid gaming venues, younger patrons and female patrons (although this type of increase was reported by all venue types).

Given that the increase in revenue for non-gaming venues has been marginal since the introduction of EGMs into Victoria, they have been unable to make the types of substantial improvements to their buildings and facilities as observed for gaming venues. As a result, the most likely types of improvements have been minor refurbishments mostly focused on maintenance works.

In addition, the majority of non-gaming venues have made no changes to their trading hours. Hence, non-gaming venues are now operating at substantially fewer trading hours than gaming venues.

As a consequence, only a small proportion of **non-gaming** venues report that there has been an improvement in opportunities for patrons at their venues in terms of dining and better quality facilities. In contrast, there appears to be a core proportion of venues reporting a decline in opportunities for dining and entertainment opportunities for patrons at their venues (especially hotels). The majority of non-gaming patrons are unlikely to have noticed any changes in opportunities at non-gaming venues. Furthermore, entertainers clearly feel that their opportunities for work at non-gaming venues have declined since the introduction of EGMs into Victoria (especially at hotels). This decline is focused on reduction in patronage, competition from gaming venues, and reduced entertainment budgets.

Non-gaming venues actively contribute to the community, however at a lower dollar value than gaming venues. Donations are the most likely type of contributions.

External Impacts on the Hotel and Club Industry

It cannot be assumed that gaming is the sole contributor to changes in the hotel and club industry since the introduction of EGMs. Many non-gaming related factors have been identified by venues as having an impact on their business.

Of those venues that have extended their trading hours, the majority reported it as having a positive impact on their venue. In addition to the extension of trading hours, both gaming and non-gaming venues reported the development of the area as a tourist destination as having a positive impact. Gaming venues were also likely to report the positive impact of changes in patron leisure patterns and preferences. The ageing of society was seen as having a positive effect by gaming venues but predominantly negative by non-gaming venues.

The aspects nominated by a high proportion of gaming venues as having a negative impact on their business were competition from other gaming venues and the extended trading hours of other venues.

The Liquor Control Reform Act 1998 has permitted restaurants to sell liquor without the requirement that they sell a meal. Both gaming and non-gaming venues were equally as likely to report that these changes in liquor licensing may have a negative impact. Non-gaming venues were also likely to report changes in attitudes to drink driving and competition from gaming venues as having a negative impact.

Overall

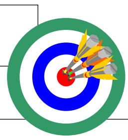
The introduction of EGMs into Victoria has had major impacts on gaming venues. The most obvious impact has been the increased revenue directly attributable to EGMs. Other impacts arising from the introduction of EGMs include increased trading hours, patronage and revenue from other trade areas (particularly the bar and dining). Hence, gaming venues have a significant financial advantage which has allowed them to make substantial improvements to buildings and facilities resulting in improved opportunities for patrons.

However, the impact of the introduction of EGMs into Victoria is somewhat less clear for non-gaming venues. There have been no obvious changes in the financial position of non-gaming venues. Consequently they are less likely to have made improvements to buildings and facilities resulting in limited improvements in opportunities for patrons when compared to gaming venues.

SECTION 1.0

Introduction & Objectives

Introduction & Objectives



1.1A BROAD OBJECTIVE

"To provide further insight into the impact on the hotel and club industry, resulting from the introduction of increased gaming opportunities in Victoria."

1.1B RESEARCH OBJECTIVES

The research objectives of this study were as follows:

- **To identify the extent to which the introduction of gaming has resulted in an improvement or decline in the provision of dining, entertainment and other facilities at venues;**
- **To evaluate how the introduction of gaming has affected the financial viability and patronage of venues;**
- **To determine the change in the market profile of the hotel and club industry since the introduction of gaming;**
- **To assess the provision and awareness of community contributions provided by venues;**
- **To compare all of the above issues between hotels and clubs and between gaming and non-gaming venues; and**
- **To determine the impact of gaming on related industries, in particular, the music and entertainment industry and on other suppliers to the hotel and club industry.**

1.0 INTRODUCTION AND OBJECTIVES

This report presents the findings of a research project which aims to *provide further insight into the impact on the hotel and club industry, resulting from the introduction of increased gaming opportunities in Victoria*.

This project is intended to retain comparability with the report "Community Facilities Resulting from the Providers of Gaming in Victoria (October 1997)" whilst being extended to include comparisons with non-gaming hotels and clubs. The project also aims to address additional objectives relating to the impact of gaming on related industries, in particular, the music and entertainment industry and on other suppliers to the hotel and club industry.

This research is related to the following objectives:

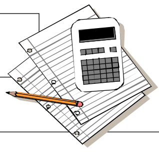
- ✓ To identify the extent to which the introduction of gaming has resulted in an **improvement** or **decline** in the **provision** of dining, entertainment and other **facilities** at venues;
- ✓ To evaluate how the introduction of gaming has affected the **financial viability** and **patronage** of venues;
- ✓ To determine the **change** in the **market profile** of the hotel and club industry since the introduction of gaming;
- ✓ To determine the impact of **non-gaming** related industry and social developments on hotels and clubs;
- ✓ To assess the provision and awareness of **community contributions** provided by venues;
- ✓ To **compare** all of the above issues between hotels and clubs and between gaming and non-gaming venues; and
- ✓ To determine the impact of gaming on **related industries**, in particular, the music and entertainment industry and on other suppliers to the hotel and club industry.

The methodology which was used during this research project is outlined in the next section.

SECTION 2.0

Methodology

Methodology



2.1 PRELIMINARY INVESTIGATIONS

- **Literature search;**
- **Focus groups amongst club and hotel patrons;**
- **Depth interviews amongst industry stakeholders including restaurants, suppliers to the hotel and club industry, entertainers/entertainers agents, municipal councils and community organisations; and**
- **Results were used as background information in designing questionnaires for the quantitative study.**

2.2 FULL SCALE QUANTITATIVE STUDY

Incorporates five separate surveys comprising:

- **698 Venue Surveys with hotels and clubs using self complete and telephone interviewing approaches (48% response rate);**
- **454 Patron Surveys with patrons of hotels and clubs using a telephone interviewing approach;**
- **51 Entertainer Surveys with entertainers and agents of entertainers using a telephone interviewing approach;**
- **34 Beneficiary Surveys with beneficiaries of contributions from the hotel and club industry using a telephone interviewing approach; and**
- **33 Supplier Surveys with suppliers to the hotel and club industry surveys using a telephone interviewing approach.**

2.0 METHODOLOGY

The **initial** stage of the research program comprised a **qualitative** investigation and was structured as follows:

- ✓ Literature search;
- ✓ Focus groups amongst venue patrons; and
- ✓ Telephone depth interviews.

The **second** stage of the research project incorporated five separate **quantitative** studies comprising the following surveys:

- ✓ Venue survey;
- ✓ Patron survey;
- ✓ Entertainer survey;
- ✓ Beneficiaries survey; and
- ✓ Supplier survey.

The methodology used for each of these is described below (see Figure 2.1 and Figure 2.2).

2.1 Preliminary Investigations

Literature Search

This stage of the research included a search of literature from the following sources:

- ✓ Previous Victorian Casino and Gaming Authority (the Authority) research reports and publications;
- ✓ Discussions with relevant industry bodies;
- ✓ Newspaper clipping search; and
- ✓ Relevant internet sites.

Discussions were held with relevant industry bodies including the Australian Hotels Association, Licensed Clubs Association of Victoria and Liquor Licensing Victoria.

In summary, the majority of previous research studies have measured the social and economic effects of the introduction of Electronic Gaming Machines (EGMs) on the community rather than the impact on the hotel and club industry and related industries. Newspaper articles provide useful background information but tend to be biased and inconclusive. The main gap in current information is the lack of existing quantitative data on the impact of the introduction of gaming on non-gaming venues.

Focus Groups with Venue Patrons

Two focus group discussions were held with patrons of club and hotel venues. To qualify for recruitment, respondents had to be regular (visit at least once a month) patrons of hotels or clubs. In addition the two groups were separated as follows:

- ✓ Group 1 comprised patrons who **prefer gaming** venues; and
- ✓ Group 2 comprised patrons who **prefer non-gaming** venues.

The groups were conducted on the 21st January 1999 and were moderated by Christine Maddern.

In-depth Telephone Interviews

A total of **58 in-depth telephone interviews** were conducted amongst various industry stakeholders. About half of the interviews (30) were conducted with hotel and club managers (15 interviews of each venue type).

The size of the **hotels** included, based on the number of EGMs at the venue, was evenly spread from venues with less than 20 machines to venues with greater than 80 machines, whereas the majority of the **clubs** interviewed were 20 to 40 machine venues.

Interviews were also conducted with the following industry stakeholders:

- ✓ Six **restaurant** interviews were obtained with one restaurant from each of the following locations: inner city, Southbank, Lygon St, a metropolitan chain restaurant, and a non metropolitan restaurant;
- ✓ Five **suppliers** to the hotel and club industry including food, liquor and catering equipment suppliers;
- ✓ Five **musicians/ musicians agents** including two musicians, two agents and a musicians' union;
- ✓ Six **municipal councils**, four metropolitan and two non-metropolitan; and
- ✓ Six **community organisations** including community service organisations, legal services and gambling counsellors.

The sample of gaming venues was selected from a database provided by the Authority. All other samples, including non-gaming venues, were selected from the Victorian electronic white pages. The sample was monitored to ensure interviews were obtained from both metropolitan and non-metropolitan venues.

The results of the preliminary stage were used as background information in designing questionnaires for the quantitative surveys. Relevant results have been incorporated into this report where applicable.

2.2 Quantitative Research

The second stage of the research project incorporated five separate quantitative studies comprising the following surveys:

- ✓ Venue survey;
- ✓ Patron survey;
- ✓ Entertainer survey;
- ✓ Beneficiaries survey; and
- ✓ Supplier survey.

Venue Survey

The venue survey is the fourth survey of gaming venues. Previous surveys that have been conducted and reported on are ‘First Survey of Gaming Venues’ (1994), the ‘Second Survey of Gaming Venues’ (1995) and ‘Community Facilities Resulting from the Providers of Gaming in Victoria’ (1997).

The questionnaire was designed to allow comparison with the previous survey results and was also extended to include additional questions. Some questions were included specifically to provide data for use in the project ‘The Economic Impact of Gaming’, another of the projects in the 1998-1999 Research Program of the Authority. Furthermore, the survey sample has been extended to include non-gaming venues to enable comparison between gaming and non-gaming venues.

A database of all licensed hotel and club venues as at January 1999 was provided by the Liquor Licensing Victoria. Gaming venues were then flagged from information provided by the Authority.

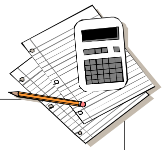
In early July 1999, all gaming venues and a random selection of approximately half of all non-gaming venues were mailed a **self-completion** questionnaire. Venue managers were allowed two weeks to respond to the survey. Venues not returning their survey in this time received a reminder call and were posted a second copy of the survey if required. Four weeks after the reminder call, those venues still failing to return the survey were again telephoned and allowed the additional option of conducting an interview over the **telephone**. By the end of September, a total of **698 venues** had returned a completed survey. Table 2.2.1 shows the total number of interviews achieved for each type of venue and their corresponding response rate. An overall response rate of **47.7%** was achieved.

Table 2.2.1 Venue Survey Response Rates

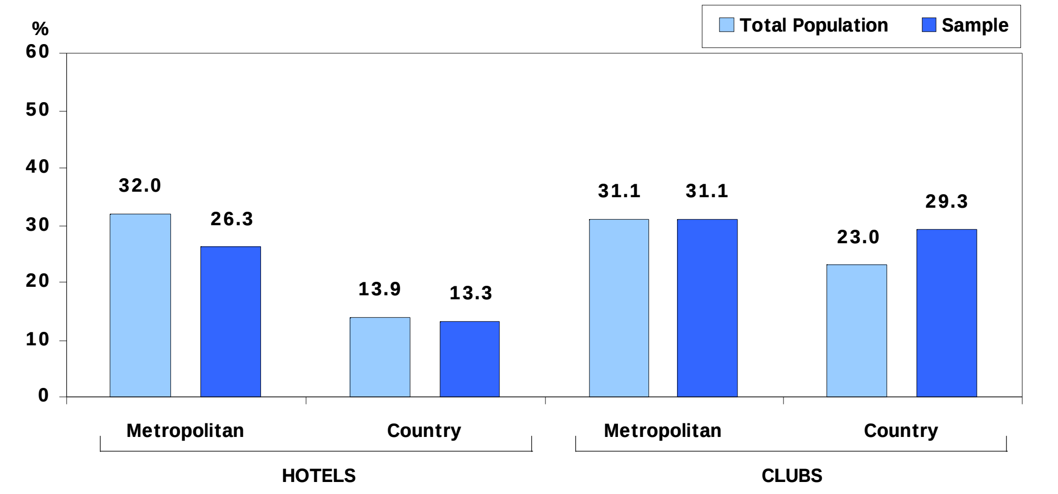
Venue Type	Total Venues Contacted	Number of Interviews	Response Rate
Non-gaming Hotel	600	229	38.2
Gaming Hotel................	258	134	51.9
Non-gaming Club	300	131	43.7
Gaming Club.................	304	204	67.1
TOTAL	**1462**	**698**	**47.7**

Sample Definition

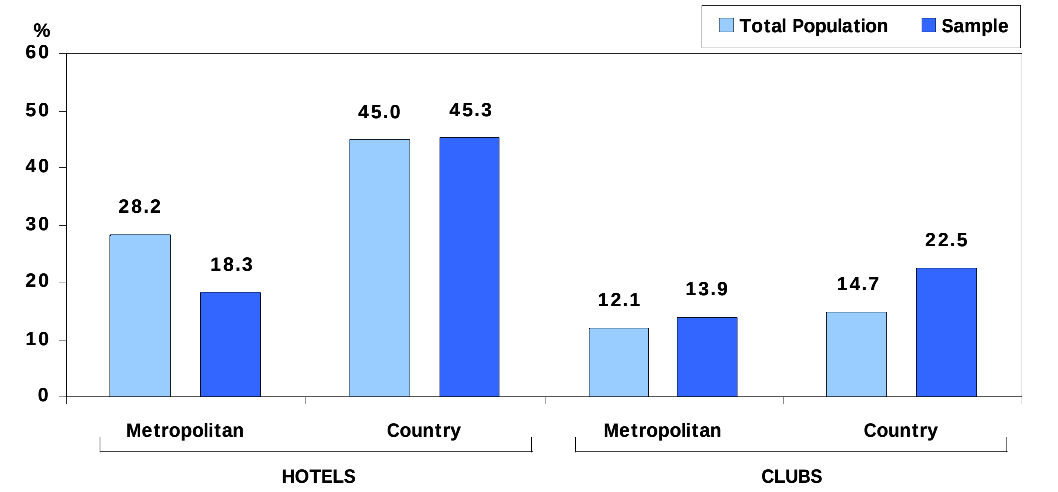
VENUE SURVEY



2.2A GAMING VENUES



2.2B NON-GAMING VENUES



Comparisons between the sample and the population illustrate the representativeness of the survey results. As illustrated by Figure 2.2A and Figure 2.2B, there is little variation in the sampled proportion of venue types and locations in comparison with the population.

Amongst **gaming** venues it can be seen that metropolitan gaming hotels are slightly under represented, due to their lower response rate (see Table 2.2.2).

Table 2.2.2 Type and Location of Gaming Venues

	POPULATION		SAMPLE	
Venue Type	Venues in Victoria	% of Venues in Victoria	Gaming Venues Responding	% of Gaming Venues Responding
Hotels	**258**	**45.9**	**134**	**39.6**
Metropolitan................	180	32.0	89	26.3
Country	78	13.9	45	13.3
Clubs	**304**	**54.1**	**204**	**60.4**
Metropolitan................	175	31.1	105	31.1
Country	129	23.0	99	29.3
TOTAL	**652**	**100.0**	**338**	**100.0**

Amongst non-gaming venues it is also revealed that metropolitan hotels are slightly under represented (see Table 2.2.3). Club venues, particularly clubs in country locations, are slightly over represented in both the gaming and non-gaming samples.

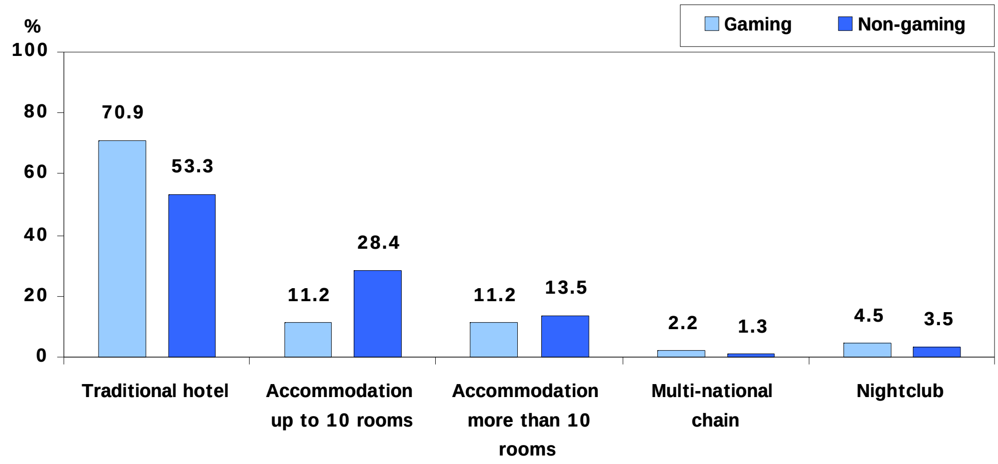
Table 2.2.3 Type and Locations of Non-gaming Venues

	POPULATION		SAMPLE	
Venue Type	Venues in Victoria	% of Venues in Victoria	Non-gaming Venues Responding	% of Non-gaming Venues Responding
Hotels..............................	**1349**	**73.2**	**229**	**63.6**
Metropolitan..................	521	28.3	66	18.3
Country	828	45.0	163	45.3
Clubs	**493**	**26.8**	**131**	**36.4**
Metropolitan..................	223	12.1	50	13.6
Country	270	14.7	81	22.8
TOTAL	**1842**	**100.0**	**360**	**100.0**

Sample Definition

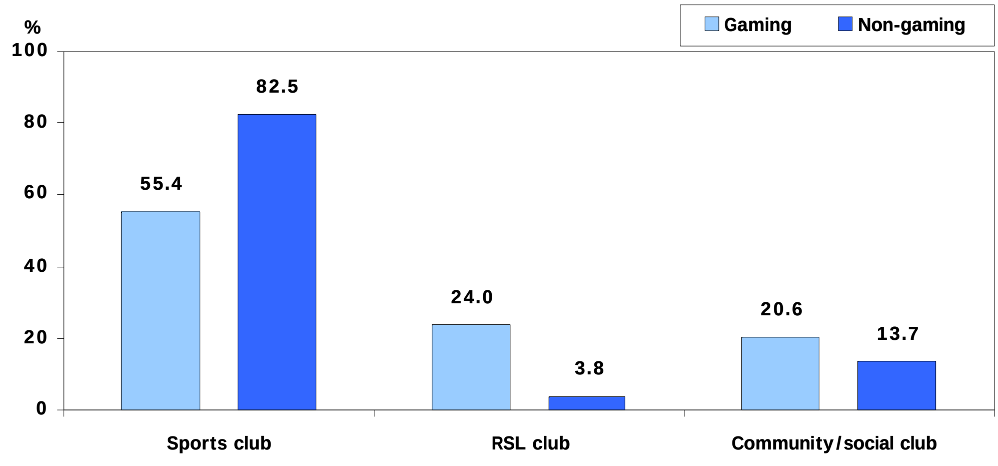
VENUE SURVEY

2.2C HOTEL DESCRIPTION



Base: Hotels (n=363)

2.2D CLUB DESCRIPTION



Base: Clubs (n=335)

The questionnaire administered to venues can be found in Appendix 1. The main topics covered in the Venue Survey included:

- ✓ Description of venue;
- ✓ Trading experiences and expectations;
- ✓ Expenditure on buildings and facilities;
- ✓ Changes in gross income since becoming an operational gaming venue (in the case of gaming venues) or the introduction of EGMs into Victoria (in the case of non-gaming venues);
- ✓ Level of subsidy of trade areas;
- ✓ Hours of operation;
- ✓ Market profile and target markets;
- ✓ Changes in facilities since becoming an operational gaming venue (in the case of gaming venues) or the introduction of EGMs into Victoria (in the case of non-gaming venues):
  - Dining;
  - Entertainment;
  - Quality of internal facilities;
  - Accommodation;
  - Conference facilities;
  - Sporting facilities; and
  - Social element.
- ✓ Changes in opportunities for live entertainers;
- ✓ Impact of non-gaming related industry and social developments; and
- ✓ Contributions to the community.

The majority of **hotels** surveyed were described as traditional hotels (70.9% of gaming venues and 53.3% of non-gaming venues). Non-gaming hotels surveyed were more likely to have accommodation when compared with gaming hotels (see Figure 2.2C).

Of all gaming clubs surveyed, 55.4% were described as sports clubs, with 24% being RSL clubs and the remainder being community or social clubs. In contrast, 82.5% of non-gaming clubs were sports clubs and only 3.8% were RSL venues (see Figure 2.2D).

In the discussion in this report, **hotel** refers to a venue holding a General (Class 1) liquor licence and **club** refers to a venue holding a Full Club liquor licence. Whilst it is possible for a venue holding some other types of licence to be a gaming venue, in practice nearly all gaming venues fall into the above two categories.

In Table 2.2.4 is given the number of venues holding these types of liquor licence as at 30 June in each of the years from 1993 to 1999. Also given is the number of hotel and club gaming venues at the corresponding times.

Table 2.2.4 Hotel and Club Liquor and Gaming Licences from 1993 –1999

	1993	1994	1995	1996	1997	1998	1999
Liquor Licence							
Hotel - General (Class 1)	1547	1551	1581	1582	1587	1589	1622[1]
Club - Club Full	733	752	764	778	774	789	804
Gaming Licence							
Hotel....................................	123	161	214	243	259	257	259
Club.....................................	128	204	254	278	295	302	302

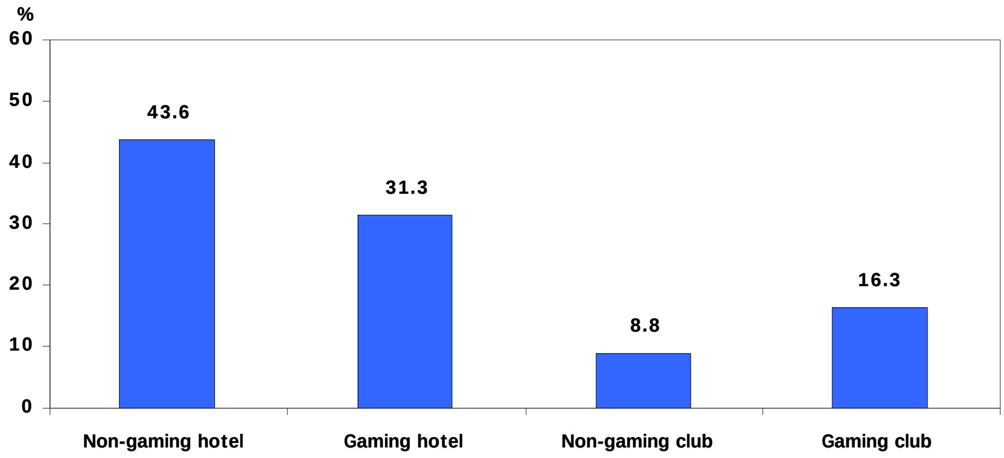
Source: Liquor Licensing Victoria and the Victorian Casino and Gaming Authority. Figures are as at 30 June in the years indicated.

Note: [1] General (Class 1) figures for 30/6/99 are presented consistent with the licence types over the period 1993 to 1998 although from 17 February 1999, residential licences became General (Class 1) licences

Sample Definition

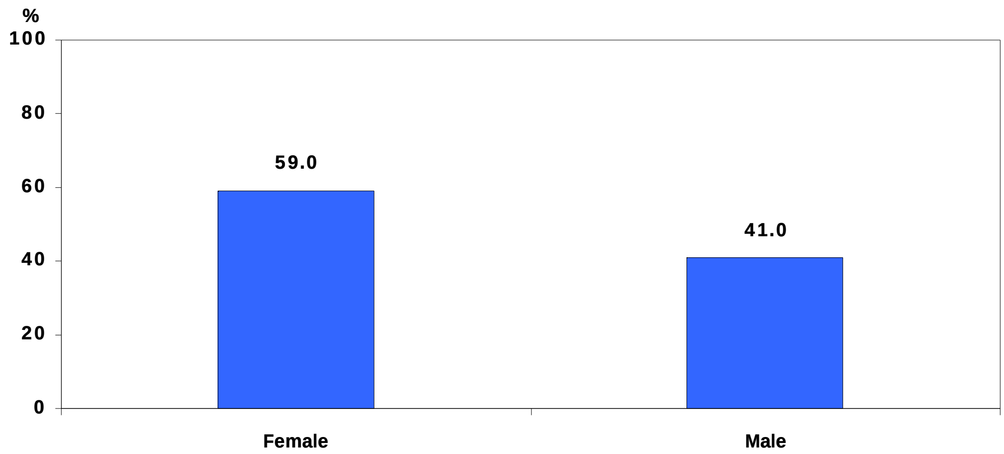
PATRON SURVEY

2.2E VENUE TYPE VISITED MOST OFTEN



Base: All respondents (n=454)

2.2F GENDER



Base: All respondents (n=454)

Patron Survey

During July 1999, a total of **454 interviews** were conducted by **telephone** with patrons of hotel and club venues. To qualify for the survey the respondent was required to have visited a hotel or club in the past six months. The sample was randomly selected from the electronic white pages.

The questionnaire for the Patron Survey can be found in Appendix 2. The main topics covered include:

- ✓ Frequency of visitation to venues;
- ✓ Main purpose for visitation;
- ✓ Preferences for venue type; and
- ✓ Perceptions of changes in facilities at the venue type visited most often since the introduction of EGMs into Victoria in 1992 including:
  - Dining;
  - Entertainment;
  - Quality of facilities;
  - Sporting facilities;
  - Social element; and
  - Live entertainment.

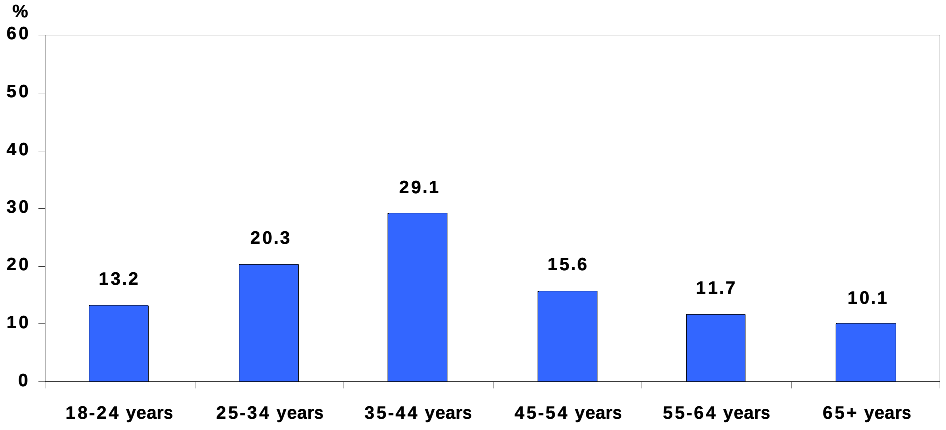
Patrons were asked to discuss their perceptions of changes at the venue type they visit the most often. As illustrated in Figure 2.2E, over 40% of respondents reported visiting non-gaming hotels the most, and 31.3% reported visiting gaming hotels the most. A smaller proportion of respondents reported visiting clubs the most often (16.3% gaming club and 8.8% non-gaming clubs).

Approximately 60% of respondents were female and 40% were male (see Figure 2.2F). Patrons from a wide cross-section of age groups were interviewed (see Figure 2.2G). As illustrated in Figure 2.2H the majority of respondents were employed full time (46%).

Sample Definition

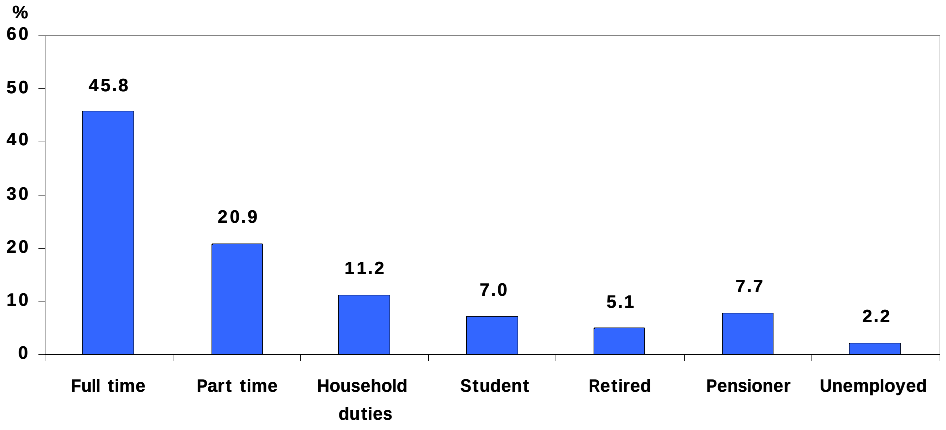
PATRON SURVEY

2.2G AGE



Base: All respondents (n=454)

2.2H EMPLOYMENT STATUS

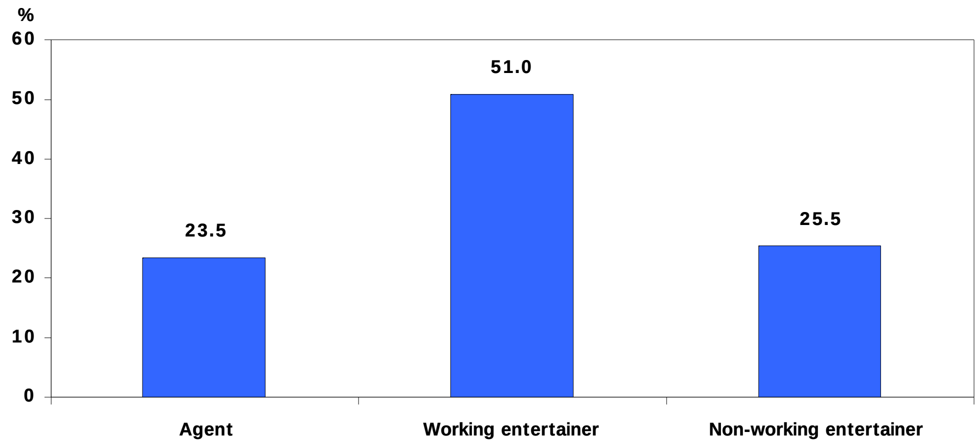


Base: All respondents (n=454)

Sample Definition

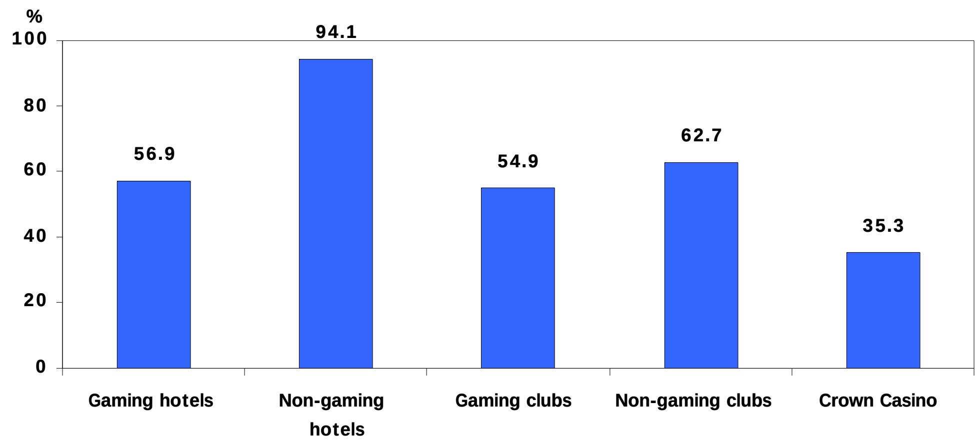
ENTERTAINER SURVEY

2.2I ENTERTAINER OR AGENT



Base: All respondents (n=51)

2.2J TYPE OF VENUES WORKED/PLACED ENTERTAINERS IN THE PAST



Base: All respondents (n=51)

Entertainer Survey

A total of **51 telephone** interviews were conducted with entertainers and agents of entertainers who have worked in the hotel and club industry. The sample was selected from the electronic white pages and was supplemented by a database obtained from a major Melbourne music store.

A copy of the questionnaire for the Entertainer Survey can be found in Appendix 3. The main topics covered in the survey include:

- ✓ Venues worked at in the past;
- ✓ Venues currently worked at most frequently;
- ✓ Perceptions of change in opportunities for entertainers at each of the venue types;
- ✓ Main reasons for the changes in opportunities; and
- ✓ Perceptions of the extent to which non-gaming related issues have had an impact on opportunities for entertainers.

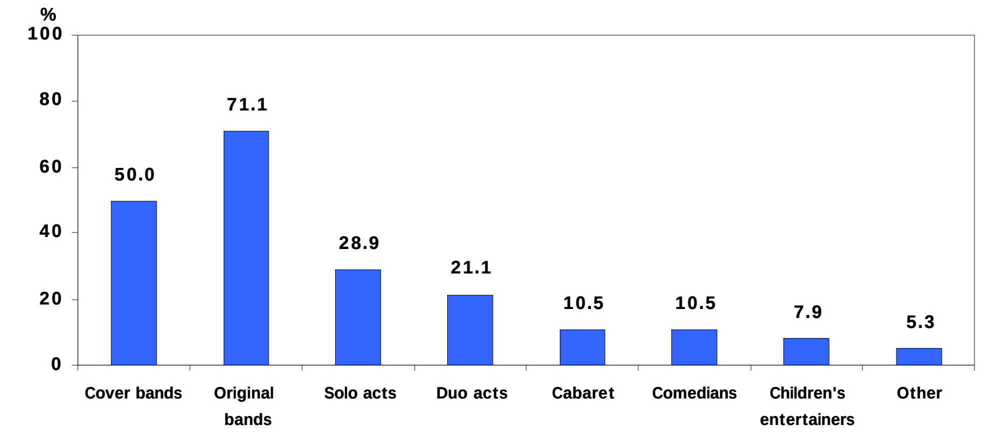
As illustrated in Figure 2.2I, approximately half of the interviews were conducted with entertainers who are currently working, and the remaining interviews with agents and entertainers who are not currently working. Nearly all entertainers have worked at or placed entertainers at non-gaming hotels and over half have worked at non-gaming clubs and gaming venues. Approximately a third of respondents have worked at the Crown Casino (see Figure 2.2J).

Respondents in the sample provide a wide range of different types of live entertainment including cover and original bands, solo and duo acts, cabaret, comedy and children's entertainment (see Figure 2.2K). Of those respondents currently working, approximately half provide entertainment to the hotel and club industry more than once a week (see Figure 2.2L).

Sample Definition

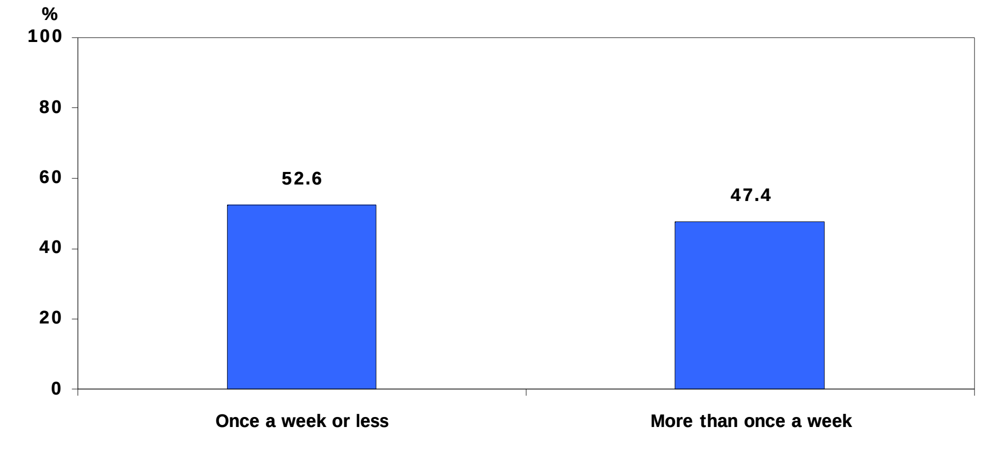
ENTERTAINER SURVEY

2.2K TYPE OF ENTERTAINMENT PROVIDED



Base: Agents and working entertainers (n=38)

2.2L FREQUENCY OF PROVIDING LIVE ENTERTAINMENT FOR HOTELS/CLUBS



Base: Agents and working entertainers (n=38)

Beneficiaries Survey

A total of **34 telephone** interviews were conducted with organisations nominated as being beneficiaries of contributions from hotels and clubs. The sample for this survey was obtained from organisations nominated by hotels and clubs who responded to the Venue Survey.

The sample was chosen to ensure a range of different organisations were contacted including:

- ✓ Health organisations;
- ✓ Welfare organisations;
- ✓ Sporting and community clubs; and
- ✓ Educational institutions.

The questionnaire for the Beneficiaries Survey can be found in Appendix 4. The main topics covered in the survey included:

- ✓ Willingness to approach venues;
- ✓ Type of contributions received;
- ✓ Change in the level of contributions received since the introduction of EGMs into Victoria;
- ✓ Perceptions of venues' willingness to contribute; and
- ✓ Comparison of the level of contributions received from gaming and non-gaming venues.

Supplier Survey

A total of **33 telephone** interviews were conducted with managers of organisations who supply to the hotel and club industry. A random sample of suppliers was obtained from the electronic white pages. The sorts of goods or services supplied to the hotel and club industry by the respondents in the sample included:

- ✓ Food and beverages;
- ✓ Crockery, cutlery and glassware;
- ✓ Linen services;
- ✓ Cleaning products; and
- ✓ Furniture.

The main focus of the survey was to determine whether or not there had been any perceived changes in the financial viability of suppliers to the hotel and club industry since the introduction of EGMs into Victoria. The questionnaire for the Supplier Survey can be found in Appendix 5.

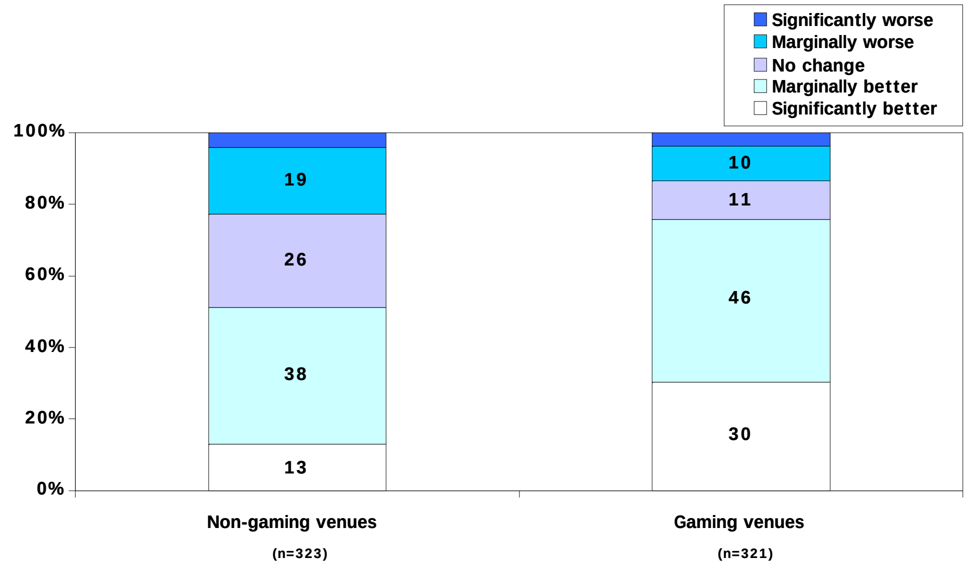
SECTION 3.0

Trading Experience & Expectations

Trading Experience & Expectations

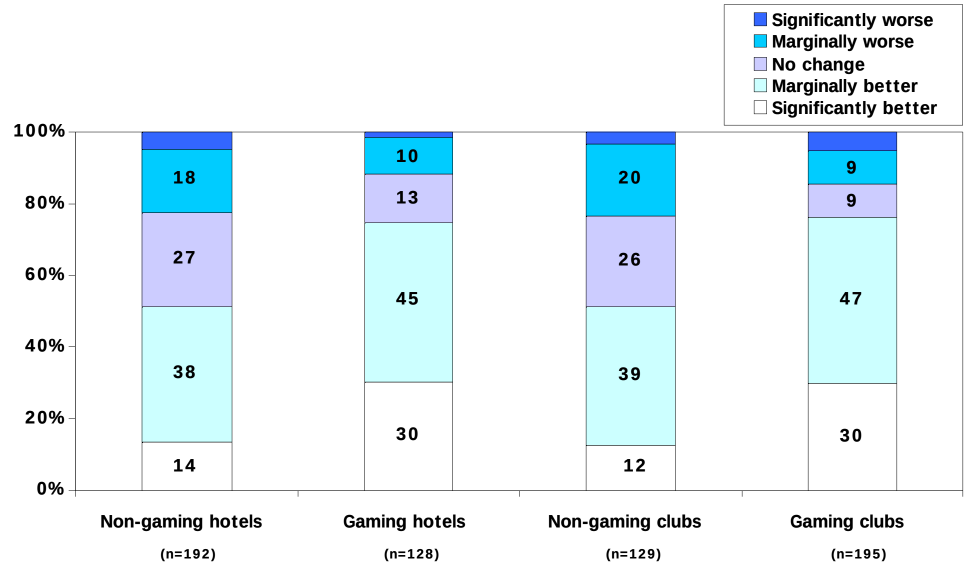
3.1A PAST TRADING POSITION - GAMING vs NON-GAMING

"How did your trading position at June 1998 compare with June 1997?"



3.1B PAST TRADING POSITION - BY VENUE TYPE

"How did your trading position at June 1998 compare with June 1997?"



Base: All respondents answering

3.0 TRADING EXPERIENCES & EXPECTATIONS

To determine the change in the trading experiences and expectations of venues since the introduction of EGMs in Victoria, changes in trading position, patronage, gross income and hours of operation have been explored.

3.1 Past Trading Position

Venues were asked to compare their trading position at June 1998 with June 1997. In general, gaming venues were more likely than non-gaming venues to report an improved trading position. As illustrated by Figure 3.1A, 76% of all gaming venues reported their trading position as being either significantly or marginally better compared to 51% non-gaming venues. Figure 3.1B provides a more detailed analysis of the past trading position for the four different venue types.

Approximately one quarter of non-gaming venues reported there had been no change, although 23% of non-gaming venues reported their trading position was worse in 1998 compared with 1997. In comparison, 13% of gaming venues reported a decline in their trading position. Despite a small sample size, it is clear that competition from gaming venues is the main reason stated by **non-gaming** venues for a **decline** in their trading position.

The main reasons reported by **gaming** venues for their trading position being **better** in June 1998 compared with June 1997 were:

- Improved facilities or renovations (26%);
- Electronic gaming machines (22%);
- Greater promotion or marketing (16%);
- Good management or business skills (12%);
- Improved income or reduced cost (10%);
- Improved meals/menu/dining (9%); and
- New management (9%).

The main reasons reported by **non-gaming** venues for their trading position being **better** in June 1998 compared with June 1997 were:

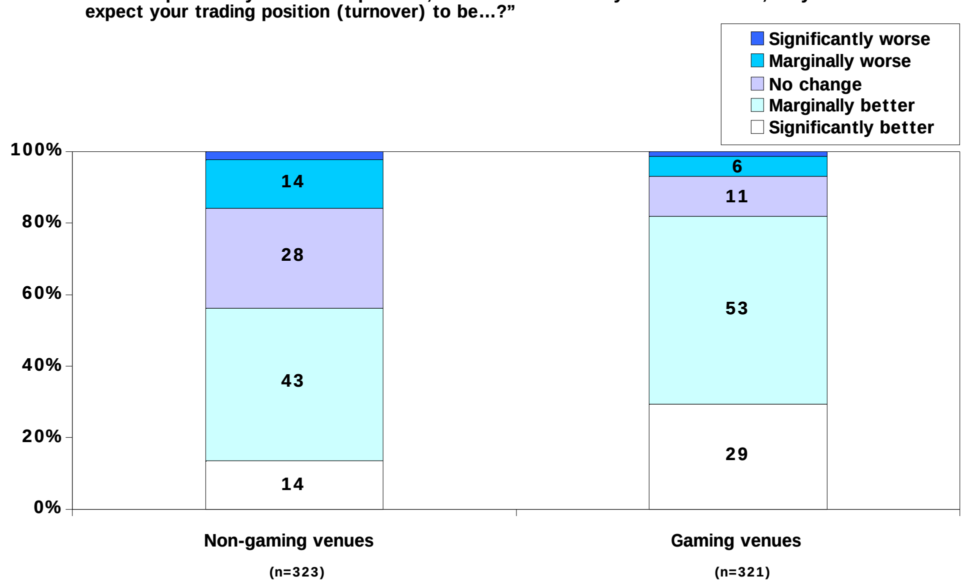
- Greater promotion or marketing (17%);
- More patrons (13%);
- Improved meals/menu/dining (11%);
- Good management or business skills (11%);
- New management (11%);
- Provided entertainment (9%); and
- Improved income or reduced cost (9%).

In line with that reported by venues, the majority of suppliers to the hotel and club industry (60%) reported an improvement in their trading position, with only 6% reporting a decline.

Trading Experience & Expectations

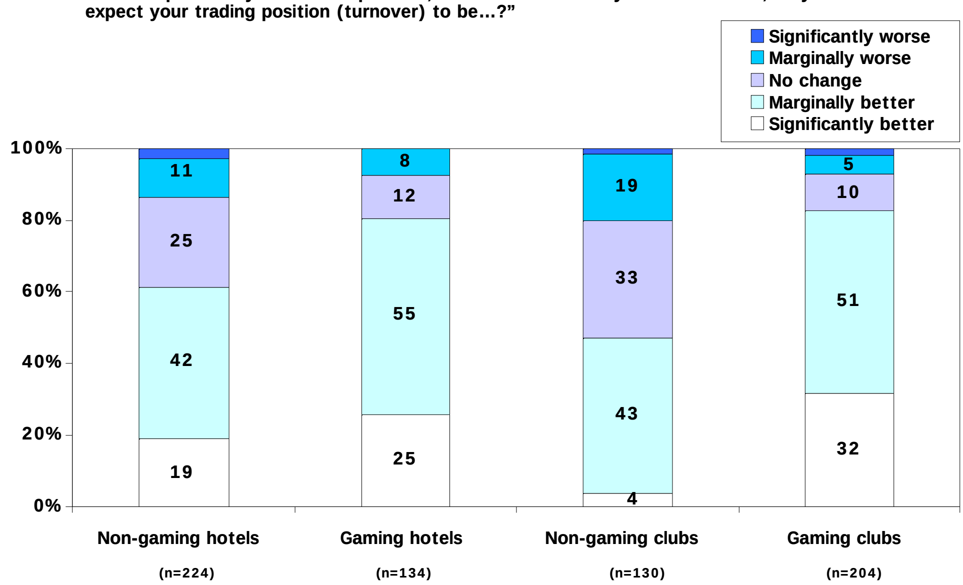
3.2A FUTURE TRADING POSITION - GAMING vs NON-GAMING

"And compared to your current position, in the next financial year 1999/2000, do you expect your trading position (turnover) to be...?"



3.2B FUTURE TRADING POSITION - BY VENUE TYPE

"And compared to your current position, in the next financial year 1999/2000, do you expect your trading position (turnover) to be...?"



Base: All respondents answering

3.2 Future Trading Position

In regards to their expected trading position for the next financial year (1999/2000), gaming venues appear to be more optimistic than non-gaming venues. Over 80% of gaming venues expect their trading position to improve compared to 56% of non-gaming venues (see Figure 3.2A). Although as illustrated by Figure 3.2B, a higher proportion of non-gaming hotels expect their trading position to improve when compared to non-gaming clubs.

The main reasons reported by **gaming** venues for expecting their trading position to be **better** in the 1999/2000 financial year were:

- ❖ Improved facilities or renovations (27%);
- ❖ Greater promotion or marketing (17%);
- ❖ Growth in business/industry (17%);
- ❖ Electronic gaming machines (15%);
- ❖ Improved income or reduced cost (15%);
- ❖ Good management or business skills (14%); and
- ❖ Improved meals/menu/dining (10%).

The main reasons reported by **non-gaming** venues for expecting their trading position to be **better** in the 1999/2000 financial year were:

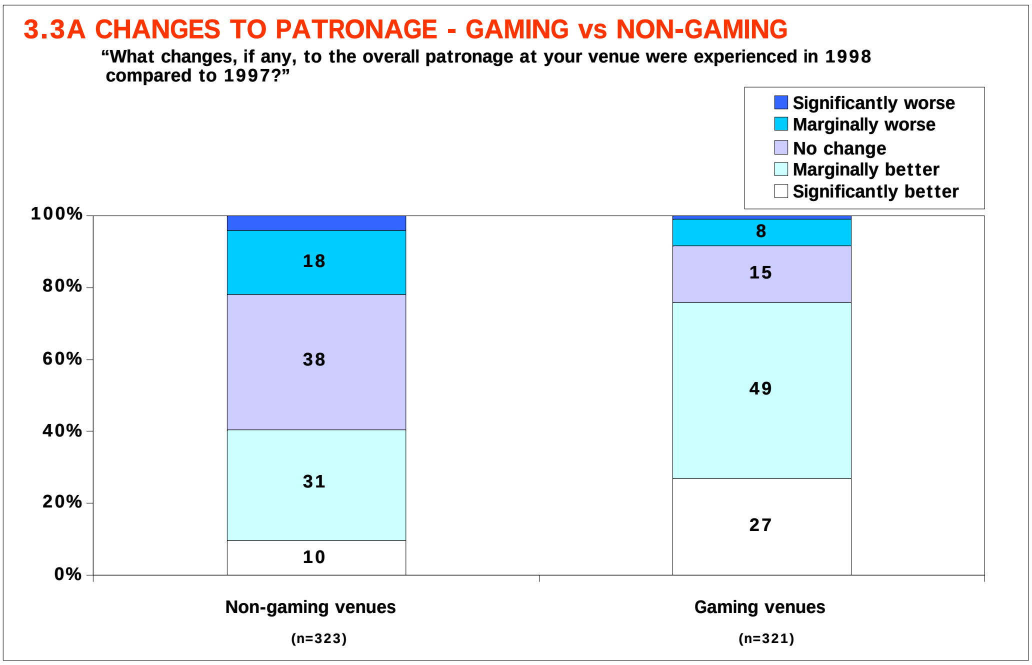
- ❖ Greater promotion or marketing (24%);
- ❖ Improved facilities or renovations (23%);
- ❖ New management (19%);
- ❖ Improved meals/menu/dining (12%);
- ❖ Local development (10%);
- ❖ Good management or business skills (10%); and
- ❖ More patrons (10%).

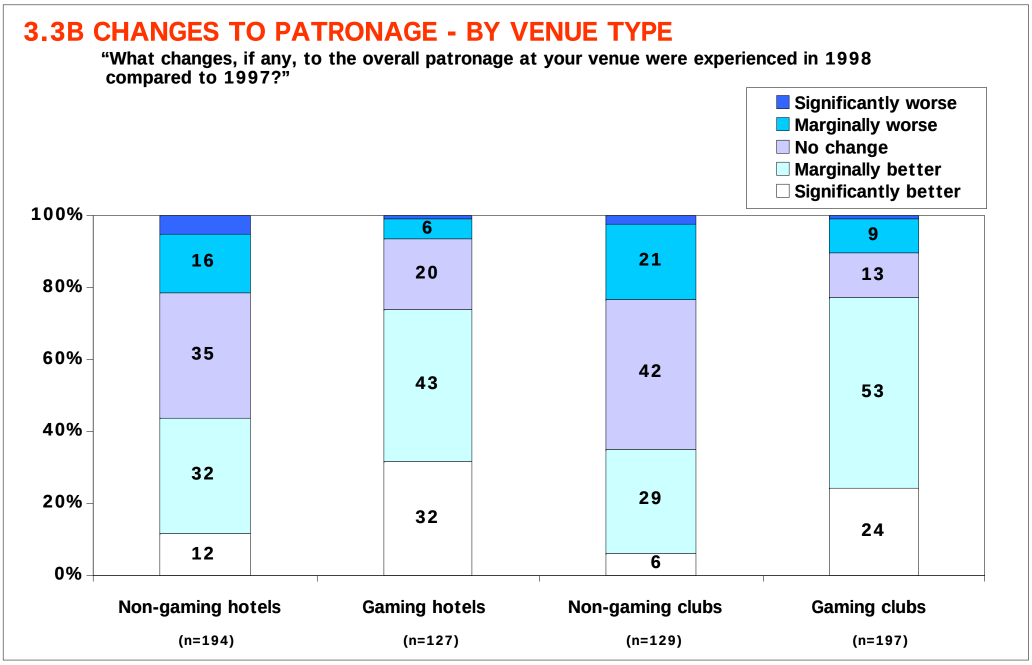
A higher proportion of non-gaming venues (16%) when compared to gaming venues (7%) are expecting their trading position in the 1999/2000 financial year to be worse than they are currently experiencing .

The main reason stated by non-gaming venues for this decline was lower alcohol consumption. Other reasons stated by non-gaming venues include economic climate, competition from sources other than gaming venues and less patronage. Despite small sample sizes, it is interesting to note that the majority of gaming venues expecting a decline in their trading position stated the removal of EGMs from the venue as the main reason.

Suppliers to the hotel and club industry are also optimistic about their trading position for the 1999/2000 financial year. Approximately 85% of suppliers expect their trading position to be significantly or marginally better and only 3% expect a decline in their trading position.

Trading Experience & Expectations





Base: All respondents answering

3.3 Changes to Patronage

Venues were asked to compare their level of patronage during 1998 with that during 1997. As illustrated in Figure 3.3A gaming venues were more likely than non-gaming venues to have experienced an improvement in patronage. Over 75% of gaming venues experienced an improvement in patronage compared to 40% of non-gaming venues.

The main reasons reported by **gaming** venues for the increase in patronage in 1998 compared to 1997 were:

- Greater promotion or marketing (30%);
- Improved/upgraded facilities (19%);
- Renovations/extensions (16%);
- Electronic gaming machines (13%);
- Standard of service/staff (6%); and
- Providing meals/dining (6%).

The main reasons reported by **non-gaming** venues for the increase in patronage in 1998 compared to 1997 were:

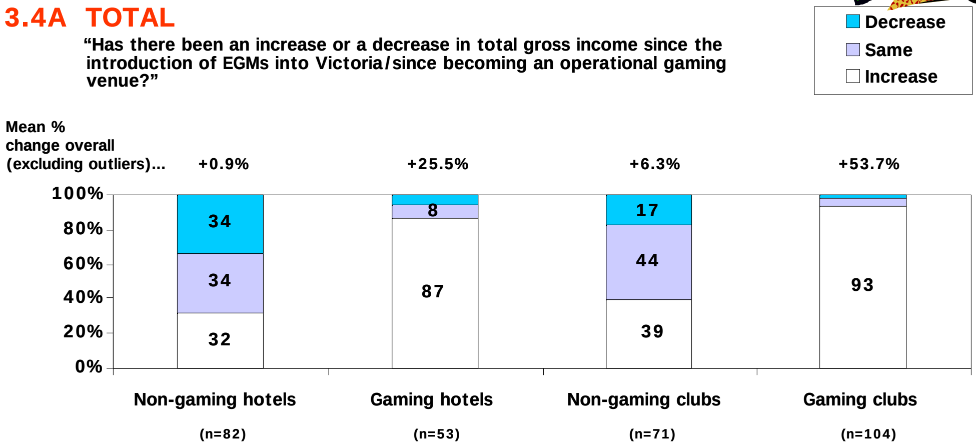
- Greater promotion or marketing (12%);
- More functions/events/conferences (11%);
- Facilities or attraction in local area (9%);
- Improved/upgraded facilities (7%);
- Changed atmosphere/business focus (7%);
- New/better management (7%); and
- Local development (7%).

A higher proportion of non-gaming venues (22%) than gaming venues (9%) had a decline in patronage in 1998 when compared to 1997. In addition to competition from gaming venues, the main reasons for the decline in patronage reported by non-gaming venues included changes in patron's lifestyles or leisure patterns, economic climate, lower alcohol consumption, and competition from sources other than gaming venues.

Gross Income Changes Since Introduction of EGMs

3.4A TOTAL

"Has there been an increase or a decrease in total gross income since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"

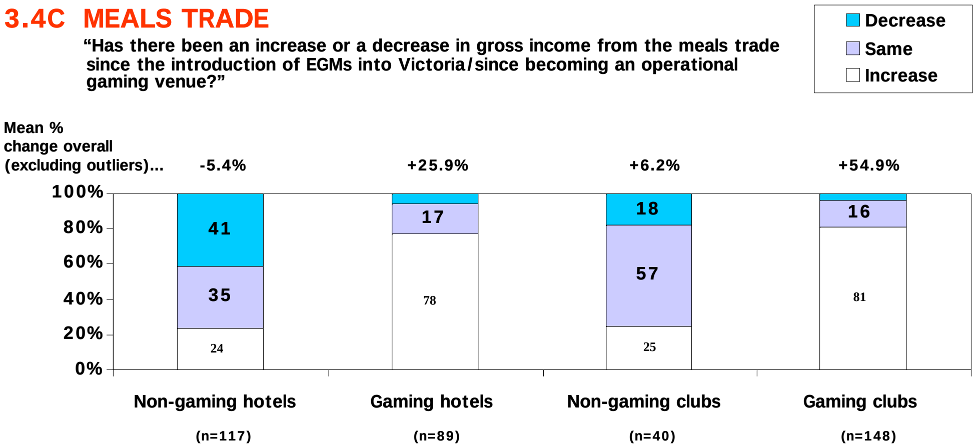


3.4B BAR TRADE

"Has there been an increase or a decrease in gross income from the bar trade since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"

3.4C MEALS TRADE

"Has there been an increase or a decrease in gross income from the meals trade since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"



Base: All respondents answering

3.4 Changes in Gross Income

In an attempt to determine the impact of the introduction of gaming on venues' gross income, gaming venues were asked if there had been an increase or a decrease in their gross income since they became an operational gaming venue. Similarly, non-gaming venues were asked if there had been an increase or a decrease in gross income since the introduction of EGMs into Victoria in July 1992. If the venue's income had increased or decreased they were asked to specify the approximate percentage change.

On average, **gaming** venues appear to have experienced a significant **increase** in gross income in all trade areas, particularly their bar and meals trade, since becoming operational gaming venues. In contrast, since the introduction of EGMs into Victoria, many **non-gaming** venues, reported a significant **decline** in their gross income in the bar, meals and entertainment trade areas (see Table 3.4.1). Non-gaming hotels appear to be more severely affected than non-gaming clubs by the introduction of EGMs in Victoria.

Table 3.4.1 Proportion of Venues Reporting Increase/Decrease in Gross Income from Trade Areas (Base: Venues that operate in trade area)

	GAMING VENUES		NON-GAMING VENUES	
Trade Area	% Reporting Increase	% Reporting Decline	% Reporting Increase	% Reporting Decline
Bar Trade (n=508)	77.7	11.7	19.2	41.0
Meals Trade (n=394)	79.7	4.2	24.2	35.0
Entertainment (n=234)	45.9	14.4	14.8	29.5
Accommodation (n=106)	23.8	4.8	18.8	18.8
Conferences (n=149)	44.9	5.6	31.7	15.0
All Other (n=330)	67.7	5.1	32.6	20.0
Total Income (n=310)	**91.1**	**3.2**	**35.3**	**26.1**

Total Gross Income

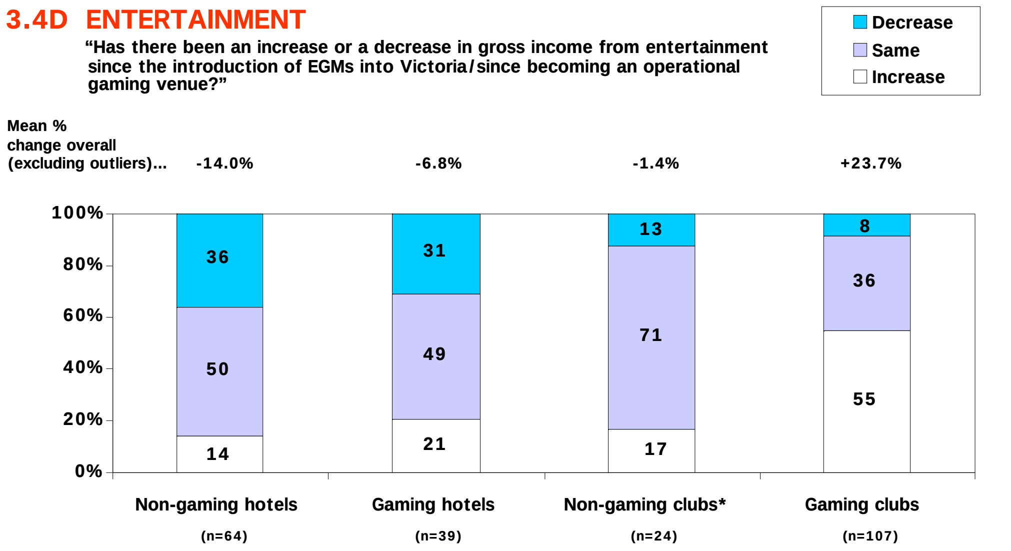
It is quite clear that **gaming** venues have had a dramatic increase in their total gross income since becoming operational gaming venues. As illustrated in Figure 3.4A approximately 87% of gaming hotels and 93% of gaming clubs have experienced an **increase** in their total gross income. The average percentage change reported by gaming venues was higher for clubs (+54%) than for hotels (+26%).

In comparison, only 32% of **non-gaming** hotels and 39% of non-gaming clubs have experienced an increase in total gross income since the introduction of EGMs into Victoria in July 1992. A third of all non-gaming hotels (34%) and 17% of non-gaming club have reported a decline in total gross income. The average percentage change in total gross income for non-gaming venues was lower for hotels (+0.9%) than for clubs (6%).

Gross Income Changes Since Introduction of EGMs

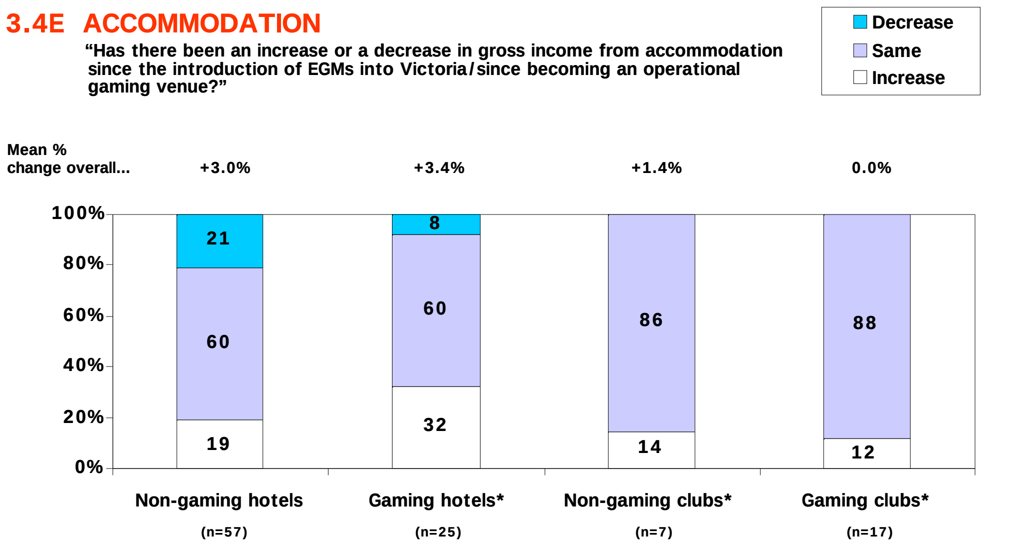
3.4D ENTERTAINMENT

"Has there been an increase or a decrease in gross income from entertainment since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"



3.4E ACCOMMODATION

"Has there been an increase or a decrease in gross income from accommodation since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"



Base: All respondents answering

***Caution: Small sample size**

Bar Trade

Approximately 73% of the sample responded about the changes in gross income from their bar trade (n=508). Overall both gaming hotels and gaming clubs have experienced an **increase** in gross income from their bar trade (+13% and +47% respectively). In contrast, non-gaming hotels have reported a decline in gross income from the bar trade (-7%) and non-gaming clubs reported only a small increase (+1%). Half of all non-gaming hotels and 29% of non-gaming clubs reported a decline in their bar trade since the introduction of EGMs into Victoria, with an average decline of -23% (see Figure 3.4B).

Meals Trade

Approximately 56% of the sample responded about their meals trade (n=394). As illustrated in Figure 3.4C, approximately 80% of **gaming** venues have reported an **increase** in gross income from the meals trade. Overall the average percentage change in gross income from meals was +26% for gaming hotels and +55% for gaming clubs.

Overall gross income from meals trade for **non-gaming** hotels decreased by 5.4% and increased by only 6.2% for non-gaming clubs. Although a quarter of non-gaming venues reported an increase in gross income from their meals trade, 41% of non-gaming hotels and 18% of non-gaming clubs reported a decline.

Entertainment

Just over a third of the sample responded about changes in gross income from entertainment (n=234). Approximately 36% of **non-gaming** hotels reported a decline in gross income from entertainment since the introduction of EGMs into Victoria, with an overall average percentage change of –14%. **Gaming** hotels also reported a decline in gross income from entertainment since becoming gaming venues. The only venue type reporting a significant increase in gross income from entertainment were gaming clubs with 55% of venues reporting an increase (see Figure 3.4D).

Accommodation and Conferences

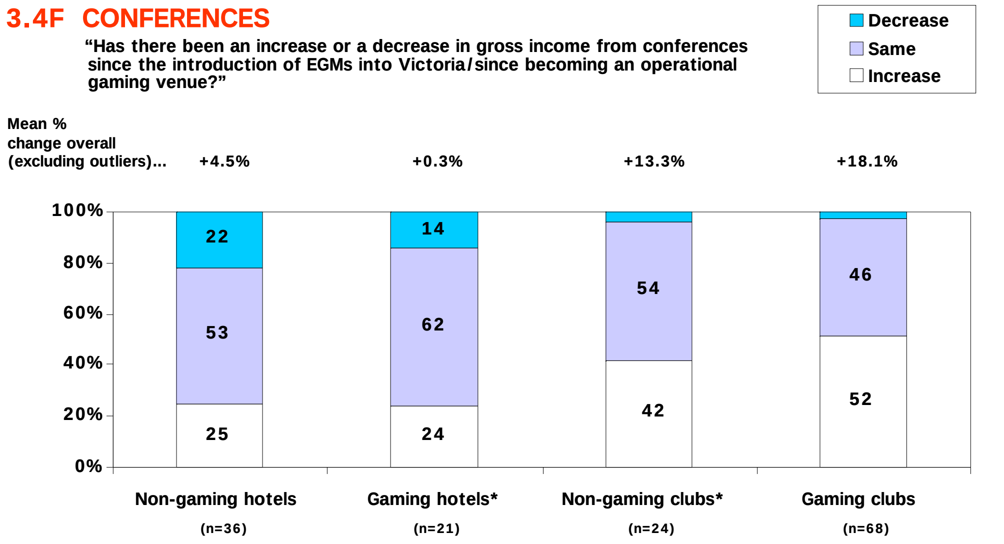
Despite small sample sizes (n=106) it appears that across all venue types, the overall gross income venues have received from **accommodation** has remained constant since the introduction of gaming. However, approximately one fifth of non-gaming hotels reported a decline in their gross income from accommodation, although a similar proportion reported an increase (see Figure 3.4E).

Just over a fifth of venues responded about their conference facilities (n=149). Gaming clubs have seen the greatest increase in gross income from **conferences**. Over half of all gaming clubs reported an increase in gross income from conferences since becoming an operational gaming venue with an overall average percentage change of +18.1% (see Figure 3.4F).

Gross Income Changes Since Introduction of EGMs

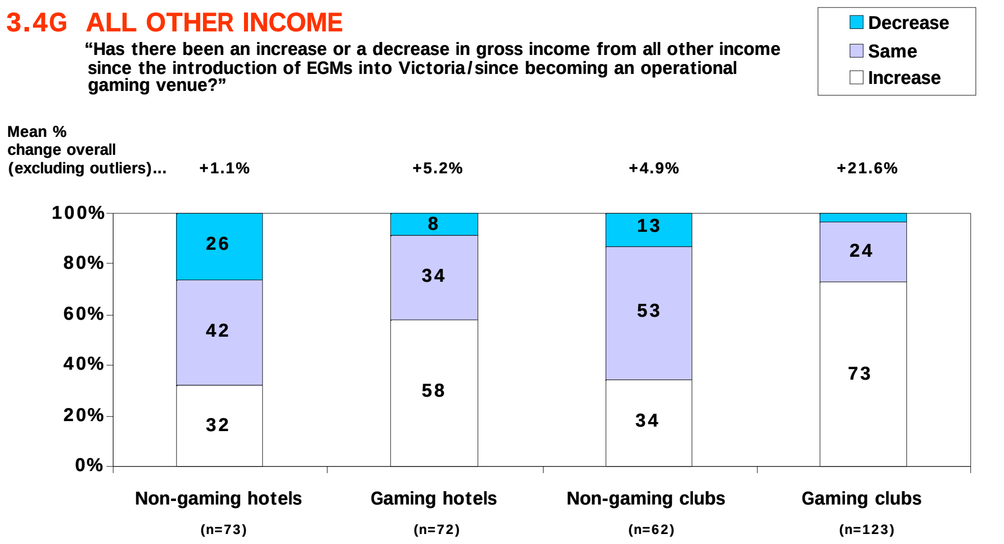
3.4F CONFERENCES

"Has there been an increase or a decrease in gross income from conferences since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"



3.4G ALL OTHER INCOME

"Has there been an increase or a decrease in gross income from all other income since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"



Base: All respondents answering

***Caution: Small sample size**

All Other Income

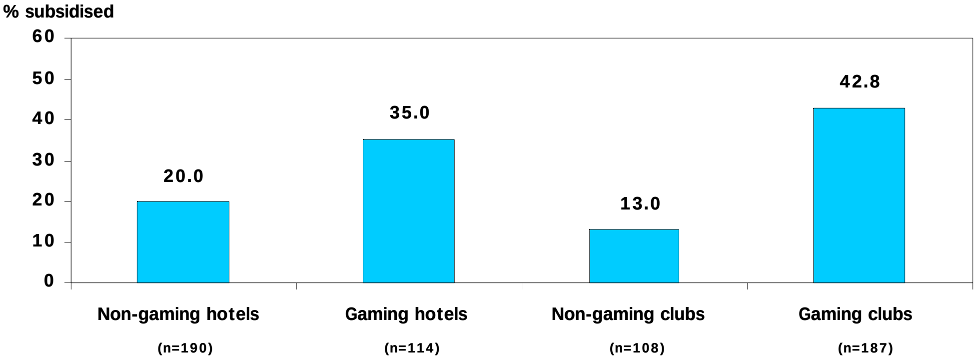
All other income includes any additional income not classified as bar trade, meals trade, entertainment, accommodation or gaming. For hotels this category is likely to include the bottle shop and for clubs this is most likely to be revenue from memberships, payment for casual use of facilities and fundraising events.

As illustrated by Figure 3.4G, gaming venues reported the greatest increase in gross income from 'all other income', with an overall change of +5.2 for gaming hotels and +21.6% for gaming clubs. Approximately a third of all non-gaming venues reported an increase in 'all other income', although 26% of non-gaming hotels reported a decline.

Subsidies

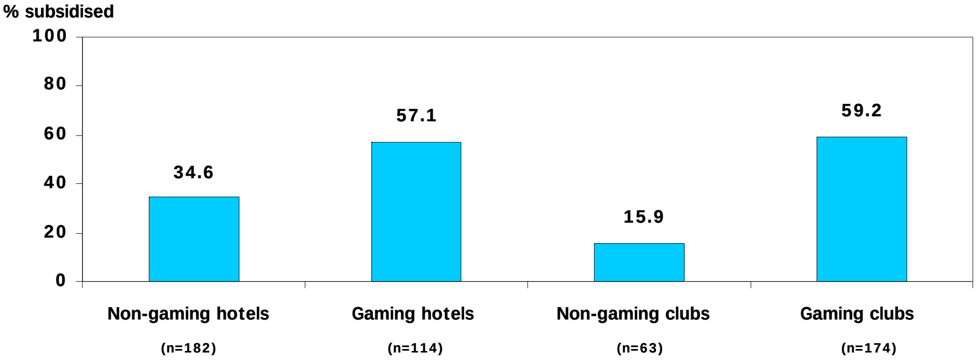
3.4H BAR TRADE

"Does your venue subsidise the bar trade?"



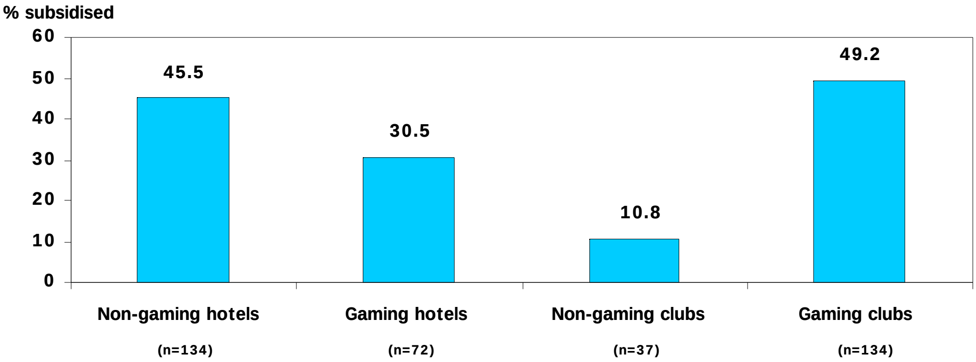
3.4I MEALS TRADE

"Does your venue subsidise the meals trade?"



3.4J ENTERTAINMENT

"Does your venue subsidise the entertainment?"



Base: All respondents answering

Subsidies

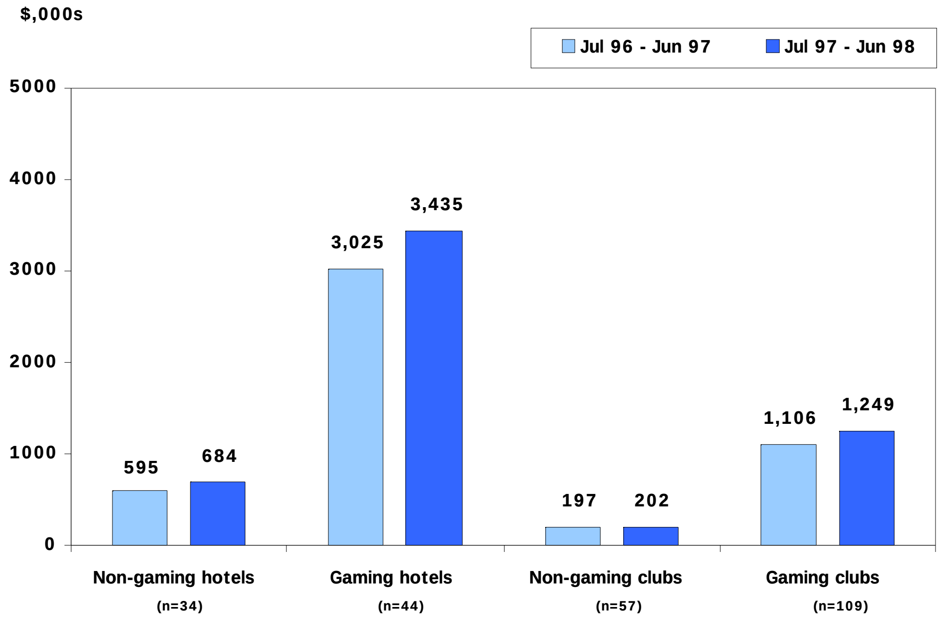
Gaming venues are more likely than non-gaming venues to subsidise their **bar** and **meals** trade. As illustrated in Figure 3.4H, over a third of all gaming hotels and 42% of gaming clubs subsidise their bar trade. In comparison only 20% of non-gaming hotels and 13% of non-gaming clubs subsidise the bar trade.

Approximately 60% of all gaming venues have reported that they subsidise their meals trade. A third of non-gaming hotels and 16% of non-gaming clubs subsidise their meals trade (see Figure 3.4I). There is a positive relationship between the number of gaming machines and the likelihood that a gaming venue subsidises their bar and meals trade.

A half of all gaming clubs reported subsidising **entertainment** at their venue. Approximately 45% of non-gaming hotels subsidise their entertainment. In comparison only 30% of gaming hotels subsidise entertainment at their venue (see Figure 3.4J).

Average Annual Gross Income

3.4K MEAN ANNUAL GROSS INCOME ($,000s) - JULY 1996 TO JUNE 1997



Base: All respondents answering

Average Annual Gross Income

Venues were asked to provide an estimate of their annual gross income for specified trade areas for the 1996/1997 financial year and the 1997/1998 financial year. The gross income specified for the individual trade areas were summed to provide an estimate of venues' total annual gross income.

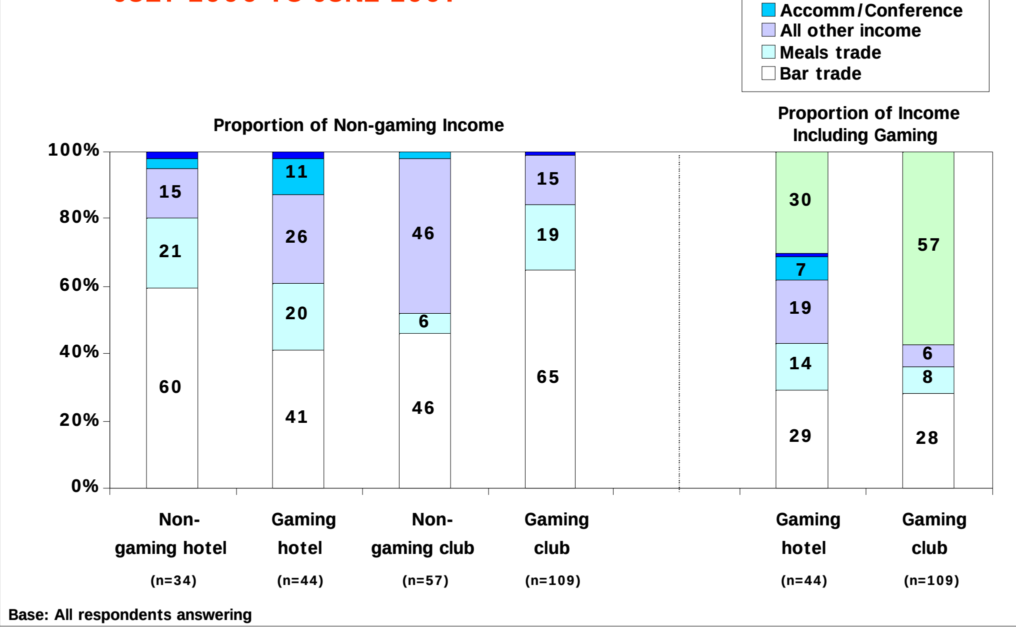
In the 1996/1997 financial year, gaming hotels had an average annual gross income of $3 million, which increased to an average of $3.4 million in 1997/1998 financial year. The average annual gross income of gaming clubs is substantially less than gaming hotels at $1.2 million in the 1997/1998 financial year.

In comparison, non-gaming hotels reported an average annual gross income of $680k in 1997/1998 and non-gaming clubs reported average annual gross income of $200k (see Figure 3.4K).

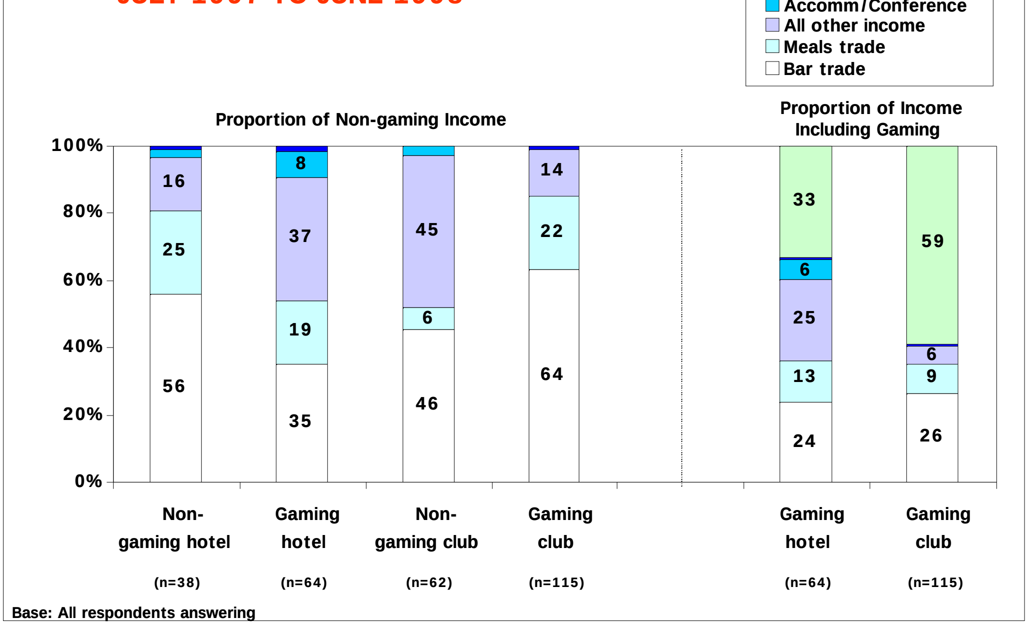
The income and employment information collected in the Venue Survey has been analysed further by the National Institute of Economic and Industry Research (NIEIR) as part of the research project *'The Economic Impact of Gaming'*, another of the projects which comprise the 1998-1999 Research Program of the Authority.

Gross Income

3.4L PROPORTION OF INCOME TO TRADE AREAS - JULY 1996 TO JUNE 1997



3.4M PROPORTION OF INCOME TO TRADE AREAS - JULY 1997 TO JUNE 1998



Proportion of Income to Trade Areas

Information provided by venues on their estimated annual gross income was used to determine that proportion of income they receive from their various trade areas. For each venue type, these proportions are calculated by first totalling the dollar figures reported by each venue. The proportion of gross income to trade areas for the period July 1996 to June 1997 is presented in Table 3.4.1.

Table 3.4.1 Proportion of Gross Income to Trading Areas – July 1996 to June 1997

	Non-Gaming Income				Total Income	
Trade Area	Non-gaming Hotel %	Gaming Hotel %	Non-gaming Club %	Gaming Club %	Gaming Hotel %	Gaming Club %
Bar	59.8	40.6	45.9	64.7	28.6	27.9
Meals	21.4	20.2	5.7	19.4	14.2	8.4
Entertainment	1.5	2.1	0.4	0.8	1.5	0.4
Accommodation	2.7	9.1	2.4	0.1	6.4	0.0
Conferences	0.0	1.6	0.0	0.1	1.1	0.1
All other income	14.6	26.5	45.5	14.8	18.6	6.4
Gaming	-	-	-	-	29.7	56.8

The proportion of gross income to trade areas for the period July 1997 to June 1998 is presented in Table 3.4.2.

Table 3.4.2 Proportion of Gross Income to Trading Areas – July 1997 to June 1998

	Non-Gaming Income				Total Income	
Trade Area	Non-gaming Hotel %	Gaming Hotel %	Non-gaming Club %	Gaming Club %	Gaming Hotel %	Gaming Club %
Bar	56.0	35.3	45.7	63.5	23.7	26.1
Meals	24.9	18.6	6.1	21.7	12.5	8.9
Entertainment	1.2	1.3	0.2	1.0	0.9	0.4
Accommodation	2.2	6.3	2.5	0.1	4.2	0.0
Conferences	0.0	1.9	0.0	0.2	1.3	0.1
All other income	15.7	36.5	45.4	13.6	24.5	5.6
Gaming	-	-	-	-	33.0	58.9

On average, in the 1997/1998 financial year, 56% of **non-gaming hotels'** income was from the bar and 25% from their meals trade. Compared to the 1996/1997 financial year, there was a slight decline in the proportion of non-gaming hotel's income from the bar and a corresponding increase from the meals trade. There was also a slight increase in income from accommodation and 'all other income' which is most likely to be an increase in revenue from bottle shops (see Figure 3.4L and Figure 3.4M).

There appears to have been a decline in the proportion of gross income **gaming hotels** receive from the bar trade and a slight decrease in the meals trade and accommodation. There is a corresponding increase in the proportion of gross income from 'all other income' which is assumed to be mostly from bottle shops. The increase in the proportion of income from the bottle shop is likely to be linked to social impacts such as changes in liquor consumption patterns and attitudes to drink driving which have lead to an increase in packaged liquor sales.

The majority of **non-gaming clubs**' income comes from the bar trade (46%) and 'all other income'. All other income is likely to be revenue from memberships, payment for casual use of facilities and fundraising events or sponsorship. Non-gaming clubs receive an average of only 6% of gross income coming from their meals trade.

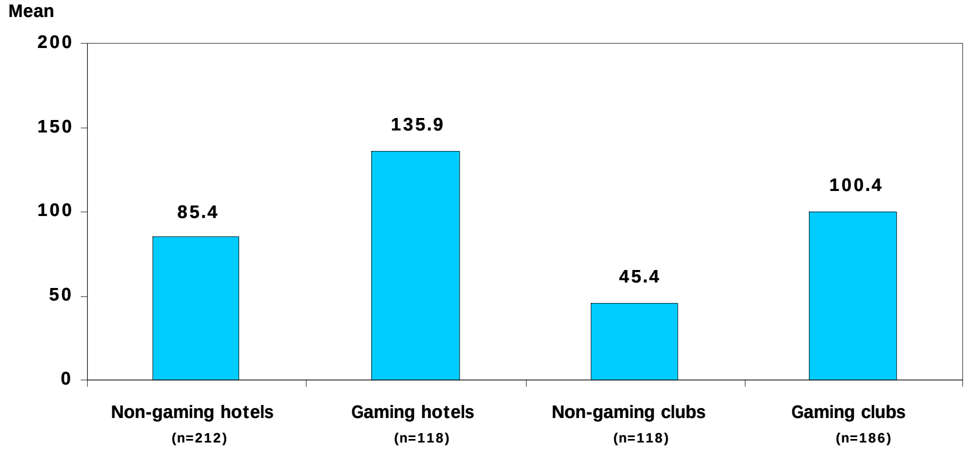
In comparison, the majority of **gaming clubs'** non-gaming income is received for the bar trade (64%), followed by their meals trade (19%). Only 14% of gaming clubs' non-gaming gross income is from 'all other income' which is dramatically lower than non-gaming clubs. Gaming clubs appear to be becoming reliant on income from EGMs (see Figure 3.4L and Figure 3.4M).

The proportion of gaming venue's income from **gaming** increased between the 1996/1997 financial year and the 1997/1998 financial year. In the 1997/1998 financial year a third of gaming hotel's income was from gaming, compared to 59% of gaming club's income. This high proportion of income from gaming is consistent with reports from gaming venues, particularly clubs, that they have suffered dramatic financial hardship when machines have been removed from venues.

Hours of Operation

3.5A MEAN TOTAL OPENING HOURS PER WEEK

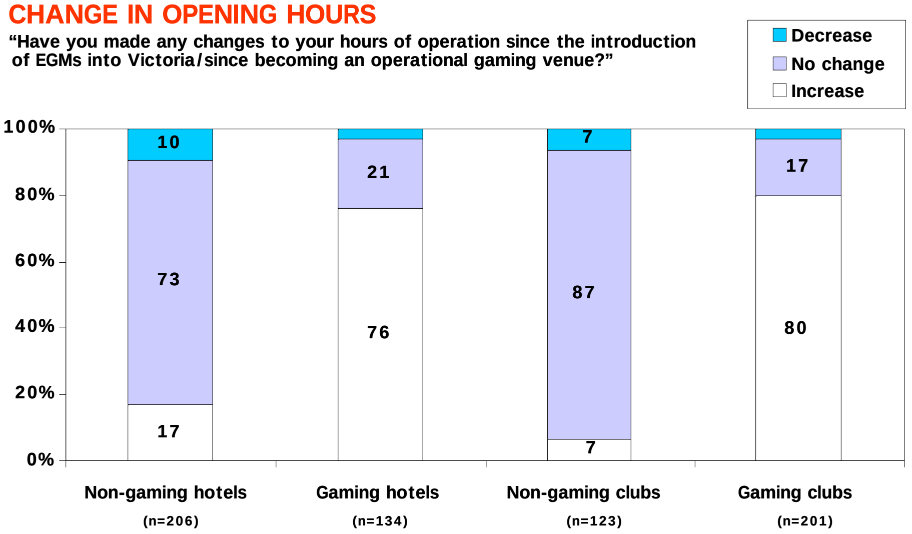
"What are your total opening hours per week?"



	Non-gaming hotels	Gaming hotels	Non-gaming clubs	Gaming clubs
% open 24hrs at least one day per week...	1.8%	38.1%	2.4%	4.4%

3.5B CHANGE IN OPENING HOURS

"Have you made any changes to your hours of operation since the introduction of EGMs into Victoria/since becoming an operational gaming venue?"



	Non-gaming hotels	Gaming hotels	Non-gaming clubs	Gaming clubs
Mean hours increase	+13.4 hrs	+33.7 hrs	+13.0 hrs	+27.5 hrs
Mean hours decrease	-9.9 hrs	-13.3 hrs	-17.5 hrs	-6.2 hrs
Mean change overall...	+1.3 hrs	+24.6 hrs	-0.3 hrs	+21.4 hrs

Base: All respondents answering

3.5 Hours of Operation

On average, **gaming venues** have **longer hours** of operation than non-gaming venues. As illustrated in Figure 3.5A gaming hotels have by far the longest hours of operation, with an average opening hours of 136 hours per week. In addition, a third of all gaming hotels are open 24 hours a day, 7 days a week and 38% are open 24 hours on at least one day per week.

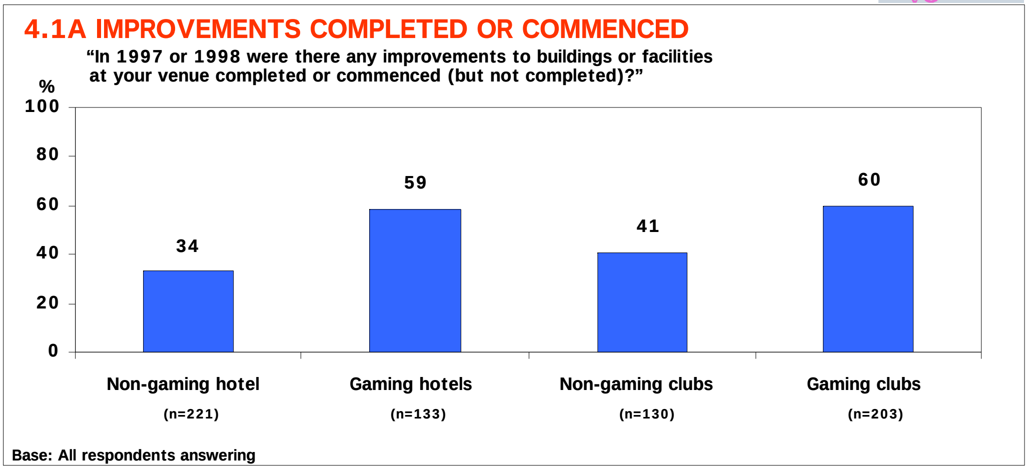
Approximately 76% of gaming hotels and 80% of gaming clubs have extended their hours of operation since becoming an operational gaming venue, with an average increase of 30 hours a week. Only 3% of gaming venues have decreased their hours of operation (see Figure 3.5B).

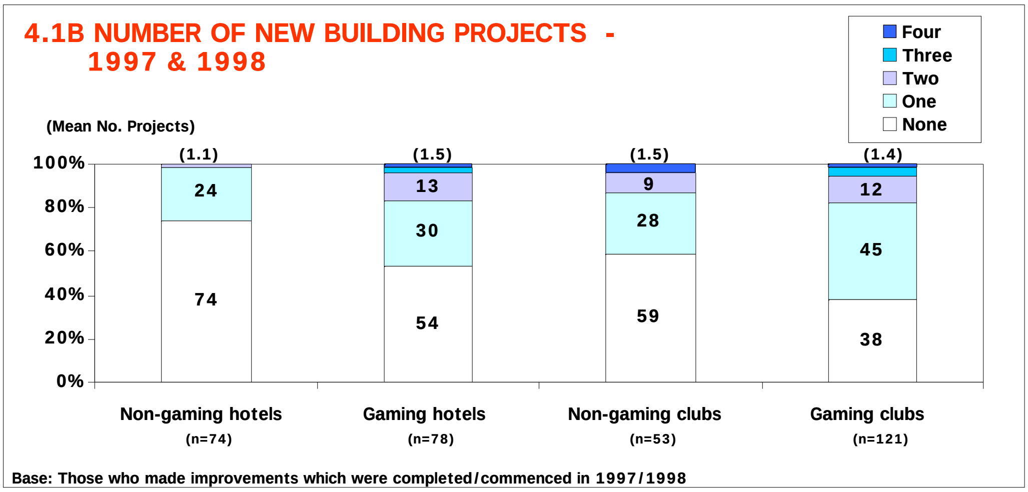
In comparison, 17% of non-gaming venues and only 7% of non-gaming clubs have extended their hours of operation since the introduction of EGMs in Victoria in July 1992. The average hours increased by non-gaming venues was 13 hours per week. Approximately 10% of non-gaming hotels and 7% of non-gaming clubs have decreased their hours of operation.

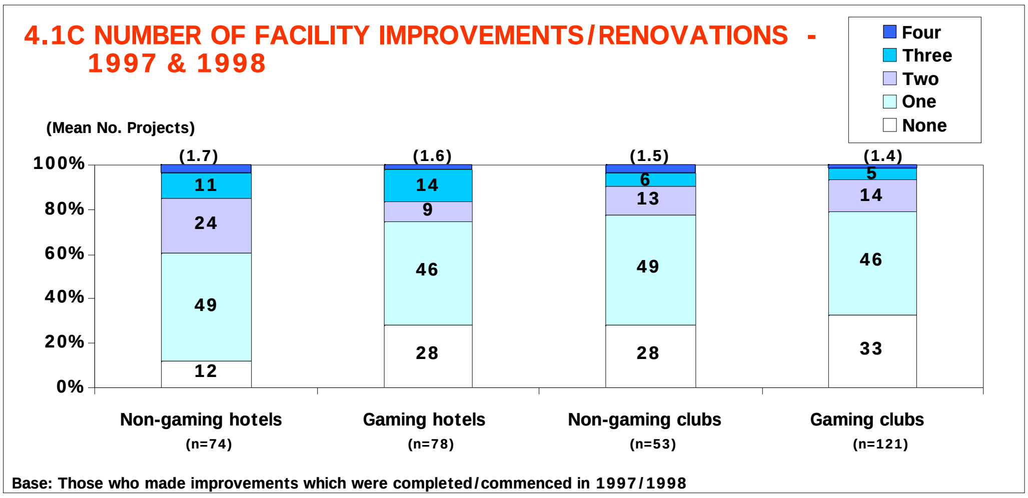
SECTION 4.0

Venue Expenditure on Building and Facilities

Actual Expenditure







4.0 VENUE EXPENDITURE ON BUILDINGS AND FACILITIES

Expenditure by venues on buildings and facilities was collected as a measure of the improvements made to venues which provide patrons with the benefits of new or improved facilities.

Venues were asked to provide information on **actual** expenditure on improvements to buildings and facilities completed or commenced in 1997 or 1998 and also expenditure **planned** for improvements to be commenced in 1999 or 2000. Details of projects were divided into the following two categories:

- New building projects – new buildings or extensions to existing building i.e. net addition to floor space; and
- Facility improvements/renovations – alterations or refurbishment of existing floor space.

Gaming venues were asked to indicate whether or not these improvements were attributable to the installation of gaming machines. Similarly, non-gaming venues indicated whether or not improvements were in response to competition from gaming venues.

From the descriptions given by gaming venues of the nature of the building projects undertaken, it was not possible to determine what proportion of projects were concerned specifically with gaming areas as opposed to other areas within the venues. However, Section 4.1 gives an indication of the composition of the projects undertaken and Section 5 gives a breakdown of the perceived impact of the introduction of EGMs on facilities including physical improvements to various areas of the venues.

4.1 Actual Expenditure 1997/1998

About 6 in 10 gaming venues had made improvements to buildings and facilities in 1997 or 1998. In comparison, only 41% of non-gaming clubs and 34% of non-gaming hotels had made such improvement during that time (see Figure 4.1A).

New Building Projects – 1997/1998

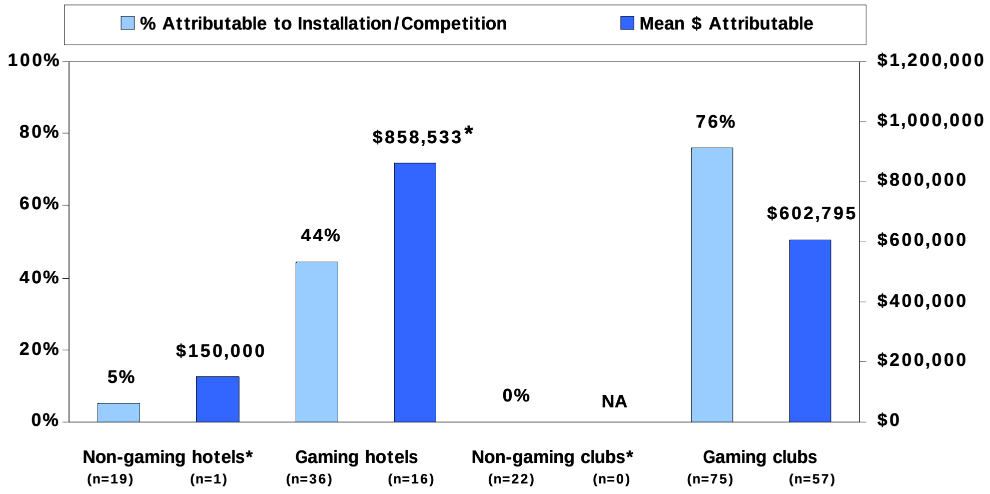
Of those venues reporting either building or facility improvements, gaming clubs were the most likely to have completed or commenced at least one new building project. Non-gaming hotels were the least likely to have commenced or completed a new building project in 1997 or 1998 (see Figure 4.1B).

Approximately 76% of gaming clubs and 44% of gaming hotels stated their new building project was attributable to the installation of gaming machines. The large majority of non-gaming venues stated their new building projects were **not** in response to competition from gaming venues (see Figure 4.1D).

Actual Expenditure

4.1D NEW BUILDING PROJECTS ATTRIBUTABLE TO GAMING

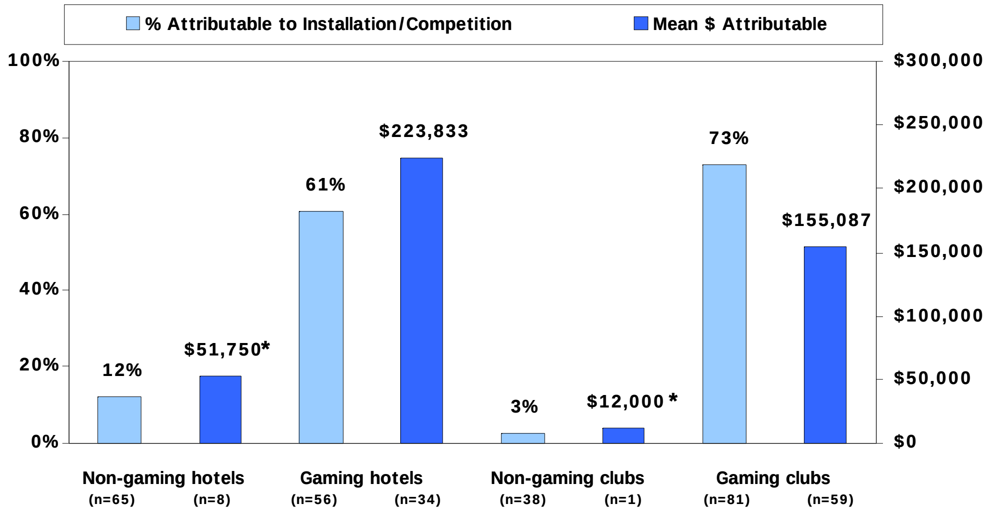
New building projects attributable to the installation of EGMs or in response to competition from gaming venues



Base: Those with new building projects which were completed/commenced in 1997/1998

4.1E FACILITY IMPROVEMENTS/RENOVATIONS ATTRIBUTABLE TO GAMING

Facility improvements/renovations attributable to the installation of EGMs or in response to competition from gaming venues



Base: Those with facility improvements which were completed/commenced in 1997/1998

Outliers excluded where identified in Mean $ values

*Caution: Small sample sizes

The average total value of new building projects attributable to gaming is slightly higher for gaming hotels ($858k) than for gaming clubs ($602k). Despite small sample sizes there appears to be a positive relationship between the number of EGMs in a gaming venue has and their expenditure on new building projects.

In comparison to gaming venues, non-gaming venues spent considerably less on new building projects in 1997/1998. On average, non-gaming clubs spend more than non-gaming hotels on new building projects (see Table 4.1.1).

Table 4.1.1 Actual Expenditure on Buildings and Facilities 1997/1998

	New Building Projects		Facility Improvements/ Renovations	
Venue Type	Average Expenditure Per Venue $	Total Expenditure $,000s	Average Expenditure Per Venue $	Total Expenditure $,000s
Non-gaming Hotel ...	161,250	2,903	65,683	3,875
Gaming Hotel..........	603,733	18,112	189,698	11,406
Non-gaming Club	219,636	4,393	48,547	1,699
Gaming Club............	580,441	41,792	148,960	11,619

Note: Outliers are excluded from average expenditure
Total expenditure is total expenditure of the sample not an industry extrapolation

Many of the new building projects undertaken by gaming venues were extensions to accommodate gaming machines. In addition, many of the new building projects undertaken by **gaming hotels** were to extend the bar and dining areas and TAB facilities. Other new building projects mentioned by gaming hotels include extensions for the following uses; kitchens, new entrances, children's play areas, toilets, accommodation and function rooms.

New building projects undertaken by **gaming clubs** were similar to those undertaken by gaming hotels with the addition of extensions to members' areas and sporting facilities.

The majority of the new building projects undertaken by **non-gaming hotels** were extensions to bar and dining areas. Following this theme, a few venues reported extending their kitchen. Other building projects undertaken by non-gaming hotels include extensions for entertainment, functions, TAB and extra accommodation.

New building projects undertaken by **non-gaming clubs** were more likely to be amenities. Examples reported by non-gaming clubs include toilets, showers, locker rooms, storage areas, car parks and extensions to improve disabled access. In addition to amenities, new building projects undertaken by non-gaming clubs were likely to be sporting areas, particularly bowling greens, and extensions to the club house.

Facility Improvements/Renovations – 1997/1998

Although non-gaming hotels were the least likely to have commenced a new building project, of those respondents reporting a venue improvement, non-gaming hotels are the most likely to have undertaken a facility improvement or renovation (see Figure 4.1C).

While the majority of non-gaming venues stated their new facility improvements or renovations were not in response to competition from gaming venues, approximately 12% of non gaming hotels stated they were in response to competition from gaming venues. Approximately 73% of gaming clubs and 61% of gaming hotels stated their facility improvements or renovations were attributable to the installation of gaming machines (see Figure 4.1E).

On average the value of facility improvements or renovations attributable to the installation of gaming was higher for gaming hotels ($223K) than gaming clubs ($155K).

In comparison to gaming venues, non-gaming venues spent considerably less on facility improvements or renovations in 1997/1998. On average non-gaming hotels spent more than non-gaming clubs on facility improvements or renovations (see Table 4.1.1).

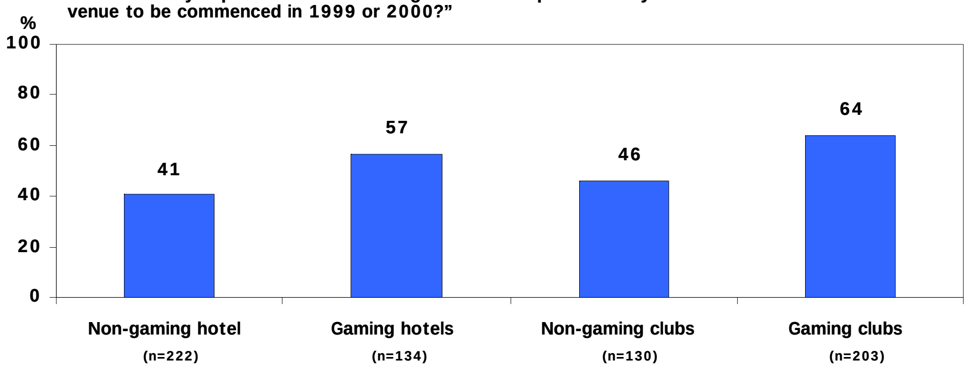
The majority of facility improvements undertaken by both gaming and non-gaming hotels included the refurbishment of the venue and improvements to the décor. In particular, this included painting interior and exterior walls, re-carpeting and new furniture in the bar, lounge and dining areas. Other improvements made to hotels included car parking, lighting, toilets, air conditioning, signage and the bottle shop. Non-gaming hotels were more likely than gaming hotels to have renovated accommodation facilities.

Clubs reported making similar improvements to hotels, although non-gaming clubs appeared to have made more improvements to sporting facilities than gaming clubs which were more likely to have refurbished dining and gaming areas.

Planned Expenditure

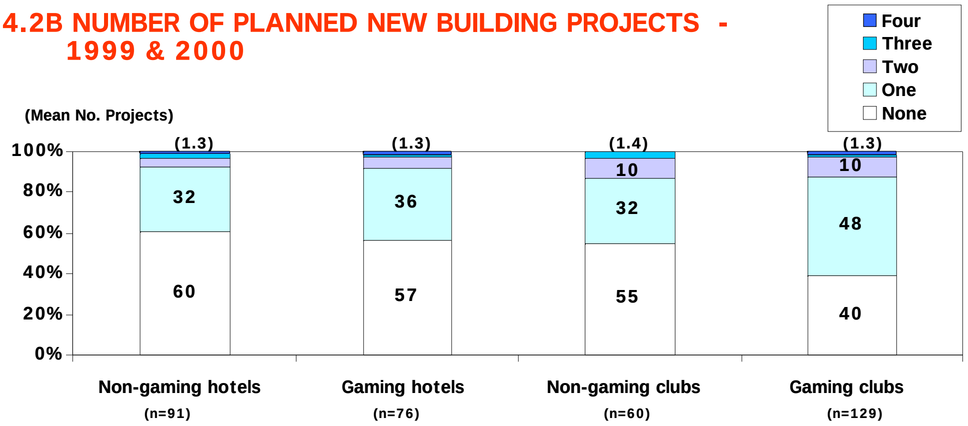
4.2A PLANNED IMPROVEMENTS

"Are there any improvements to buildings or facilities planned for your venue to be commenced in 1999 or 2000?"



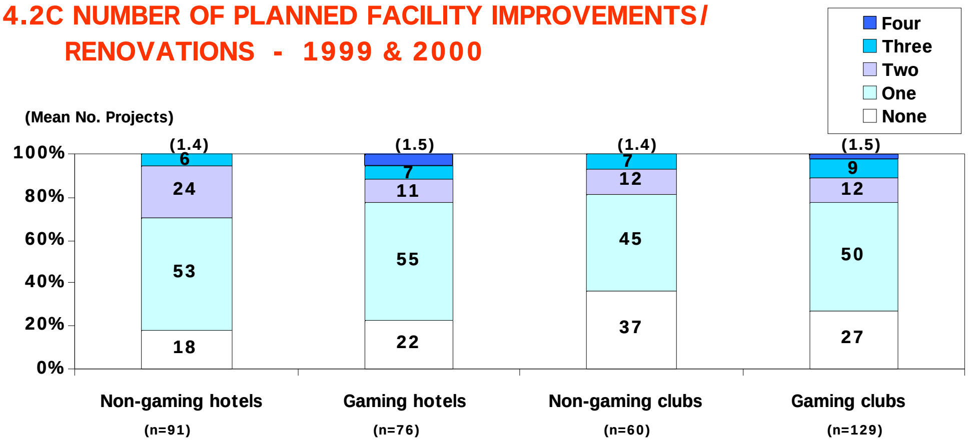
Base: All respondents answering

4.2B NUMBER OF PLANNED NEW BUILDING PROJECTS - 1999 & 2000



Base: Those with improvements planned to commence in 1999/2000

4.2C NUMBER OF PLANNED FACILITY IMPROVEMENTS/ RENOVATIONS - 1999 & 2000



Base: Those with improvements planned to commence in 1999/2000

4.2 Planned Expenditure 1999/2000

Venues were asked to provide details of improvements to buildings and facilities planned to be commenced in 1999 or 2000. Approximately 60% of gaming venues plan to make improvements to buildings and facilities in 1999 or 2000. In comparison, 46% of non-gaming clubs and 41% of non-gaming hotels plan to make such improvements (see Figure 4.2A).

New Building Projects – 1999/2000

Of those venues planning to make an improvement to their venue in 1999 or 2000, gaming clubs are the most likely to have planned to commence a new building project (see Figure 4.2B).

Gaming clubs (72%) were more likely than gaming hotels (42%) to report that the new building project planned for their venue was attributable to the installation of gaming machines. Approximately one fifth of all non-gaming hotels stated their planned new building project is in response to competition from gaming venues (see Figure 4.2D).

The average expenditure per venue planned for new building projects attributable to the installation of gaming machines is very similar between gaming hotels ($580k) and gaming clubs ($518k).

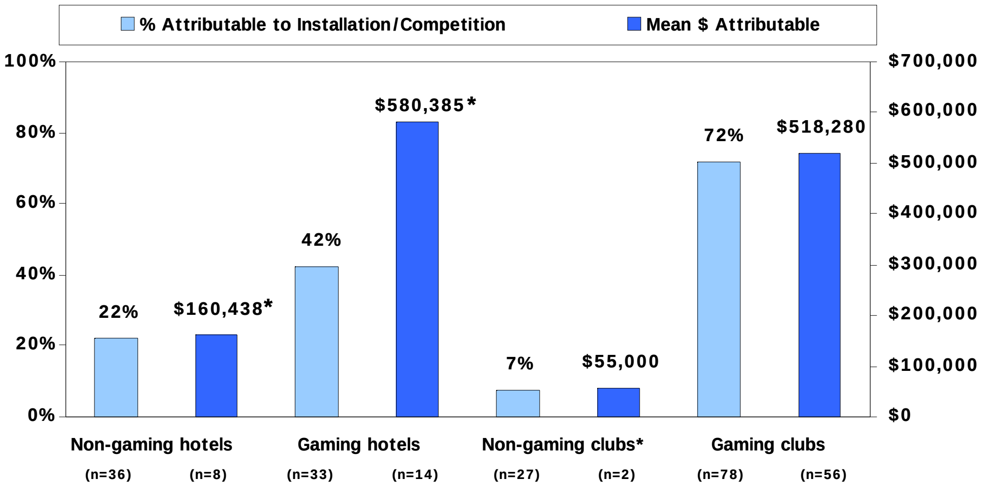
In comparison to gaming venues, non-gaming venues plan to spend much less on new building projects in 1999/2000 (see Table 4.1.2).

The type of new building project planned by venues to be commenced in 1999 or 2000 are similar to those discussed in the previous section on actual expenditure.

Planned Expenditure

4.2D PLANNED NEW BUILDING PROJECTS ATTRIBUTABLE TO GAMING

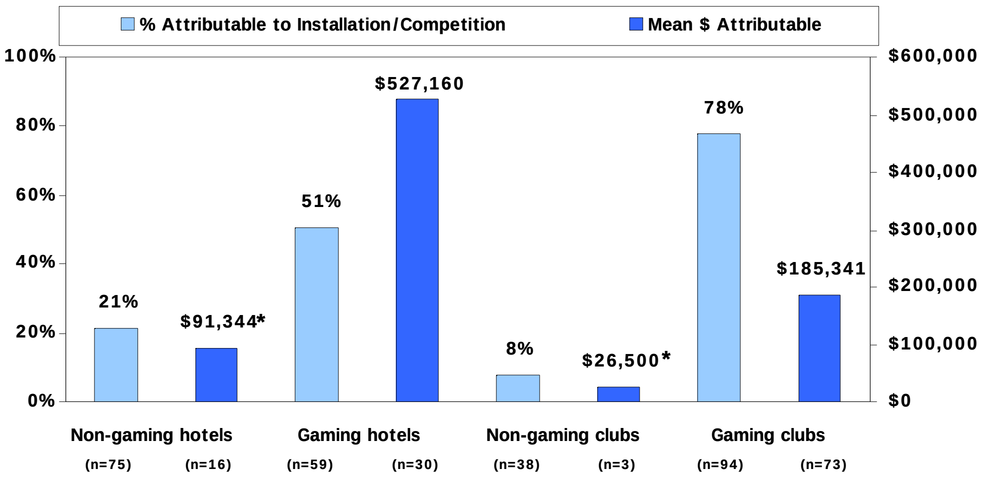
Planned new building projects attributable to the installation of EGMs or in response to competition from gaming venues



Base: Those with new building projects planned for 1999/2000

4.2E PLANNED FACILITY IMPROVEMENTS/RENOVATIONS ATTRIBUTABLE TO GAMING

Planned facility improvements/renovations attributable to the installation of EGMs or in response to competition from gaming venues



Base: Those with facilities improvements planned for 1999/2000

Outliers excluded where identified in Mean $ values

*Caution: Small sample sizes

Table 4.1.2 Planned Expenditure on Buildings and Facilities 1999/2000

	New Building Projects		Facility Improvements/ Renovations	
Venue Type	Average Expenditure Per Venue $	Total Expenditure $,000s	Average Expenditure Per Venue $	Total Expenditure $,000s
Non-gaming Hotel ...	223,703	7,159	65,652	4,070
Gaming Hotel...........	416,333	12,490	385,990	24,300
Non-gaming Club	293,571	15,339	42,414	6,027
Gaming Club............	509,118	42,920	179,973	15,658

Note: Outliers are excluded from average expenditure
Total expenditure is total planned expenditure of the sample not an industry extrapolation

Facility Improvements/Renovations – 1999/2000

Of those venues that plan to make an improvement to their venue in 1999 or 2000, 78% of gaming hotels and 73% of gaming clubs have planned to commence facility improvements or renovations in 1999 or 2000. In comparison, 82% of non-gaming hotels and 63% of non-gaming clubs have planned to commence facility improvements or renovations (see Figure 4.2C).

Approximately 78% of gaming clubs reported that their facility improvements or renovations are attributable to the installation of gaming machines, compared to 51% of gaming hotels. As illustrated in Figure 4.2E the average expenditure on facility improvements or renovations attributable to the installation of gaming machines is considerably lower for gaming clubs ($185k) than gaming hotels ($527k).

One-fifth of non-gaming hotels reported their facility improvements planned for 1999 or 2000 are attributable to competition from gaming venues. Overall planned expenditure on facility improvements or renovations is much lower for non-gaming venues compared to gaming venues.

SECTION 5.0

Perceived Impact of the Introduction of EGMs on Hotel/Club Facilities

5.0 PERCEIVED IMPACT OF INTRODUCTION OF EGMs ON HOTEL AND CLUB FACILITIES

To determine the impact of the introduction of gaming on the facilities offered, hotels and clubs were asked if there had been an improvement or a decline in the following aspects at their venue:

- ✓ Dining opportunities;
- ✓ Quality of internal facilities;
- ✓ Accommodation and conference facilities;
- ✓ Sporting facilities;
- ✓ Social elements; and
- ✓ Entertainment (excluding EGMs).

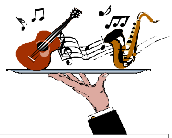
Venues were also asked about improvement or decline in opportunities for live entertainers. Patrons of hotels and clubs were also asked their perceptions of changes in facilities and live entertainment at venues since the introduction of EGMs into Victoria in July 1992.

Gaming venues were more likely than non-gaming venues to report an **improvement** in the facilities offered at their venue, particularly improvements in dining opportunities and the quality of internal facilities. A significant proportion of **non-gaming** venues reported a **decline** in the facilities offered, particularly opportunities for dining and entertainment (see Table 3.4.1).

Table 3.4.1 Proportion of Venues Reporting Improvement/Decline in Facilities

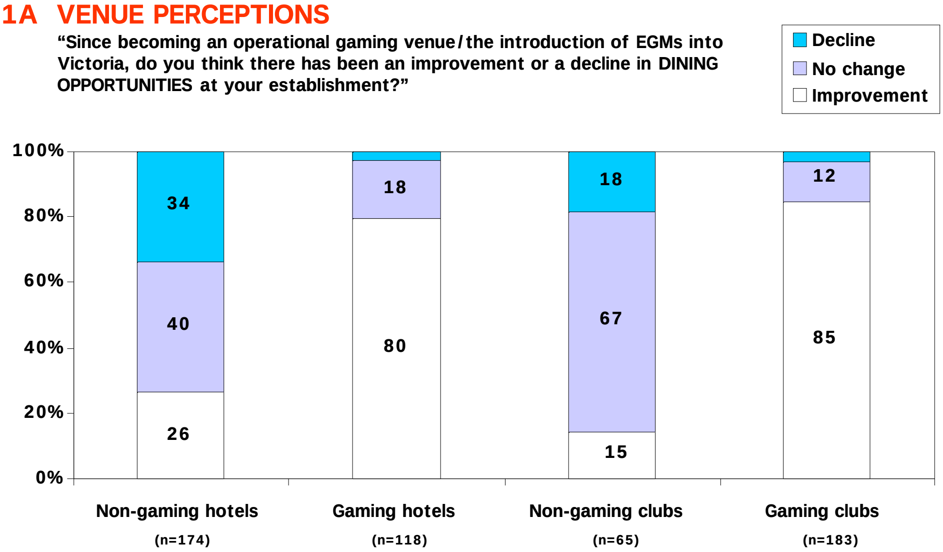
	GAMING VENUES		NON-GAMING VENUES	
Facility Type	% Reporting Improvement	% Reporting Decline	% Reporting Improvement	% Reporting Decline
Dining	82.7	3.0	23.6	30.1
Internal Facilities	87.7	0.3	33.6	5.6
Entertainment...........	57.0	9.6	16.2	26.3
Accommodation........	32.2	3.4	15.1	14.2
Conferences	55.2	3.1	17.4	6.6
Sporting Facilities.....	66.7	0.0	63.9	2.8
Social Element..........	64.4	1.7	24.4	22.2

Dining Opportunities



5.1A VENUE PERCEPTIONS

"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in DINING OPPORTUNITIES at your establishment?"



Base: All respondents answering

5.1B PATRON PERCEPTIONS

"Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in DINING at (venue visited most often)?"

Base: All respondents answering

5.1 Dining Opportunities

Gaming venues were more likely than non-gaming venues to report improvements in dining opportunities. Approximately 80% of gaming hotels and 85% of gaming clubs reported an improvement in dining opportunities as their venue since becoming operational gaming venues. In comparison, 26% of non-gaming hotels and 15% of non-gaming clubs reported an increase in dining opportunities at their venue since the introduction of EGMs into Victoria in 1992 (see Figure 5.1A).

Gaming venues reported that the following aspects of dining have **improved**:

- Quality of food (26%);
- Refurbishment of dining area (25%);
- Greater variety of food (23%);
- Price of food (16%);
- More patrons at venue (16%);
- Extended hours of trading (16%); and
- Dining area recently opened (16%).

Non-gaming venues reported that the following aspects of dining have **improved**:

- Quality of food (35%);
- More patrons at venue (31%);
- Dining area recently opened (21%); and
- Atmosphere at venue (14%).

Amongst **non-gaming** venues, approximately 34% of hotels and 18% of clubs have reported a **decline** in dining opportunities at their venue. The main aspects non-gaming venues associated with the decline in dining opportunities at their venue were a reduction in patronage at the venue (67%) and the price of food (17%).

Patrons were asked if there had been an improvement or a decline in dining at the venue they visit most often since the introduction of EGMs into Victoria. Approximately 60% of gaming hotel patrons and 55% of gaming club patrons reported an improvement in dining (see Figure 5.1B).

The aspects of dining which **gaming patrons** reported had **improved** were:

- Quality of food (46%);
- Refurbishment of the dining area (41%);
- Greater variety of food (21%);
- Price of food (20%); and
- Level of service (14%).

Only 26% of non-gaming hotels patrons and 15% of non-gaming club patrons reported an improvement in dining opportunities. The aspects of dining which **non-gaming patrons** reported had **improved** were similar to that reported by gaming patrons:

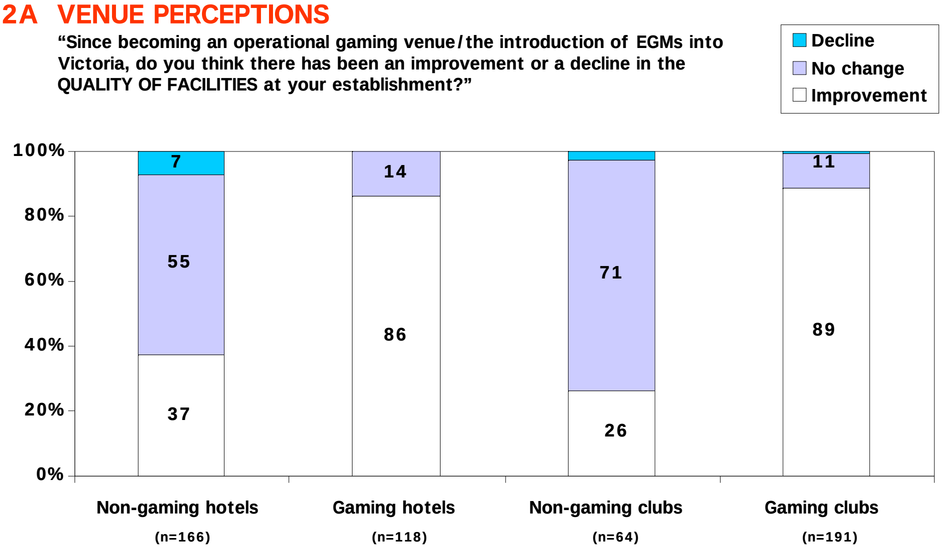
- Quality of food (42%);
- Greater variety of food (39%);
- Refurbishment of the dining area (28%);
- Price of food (15%); and
- Level of service (12%).

A small proportion of patrons from each of the venue types reported a decline in dining opportunities at venues. The main aspect associated with this decline in dining opportunities was the quality of the food.

Quality of Facilities

5.2A VENUE PERCEPTIONS

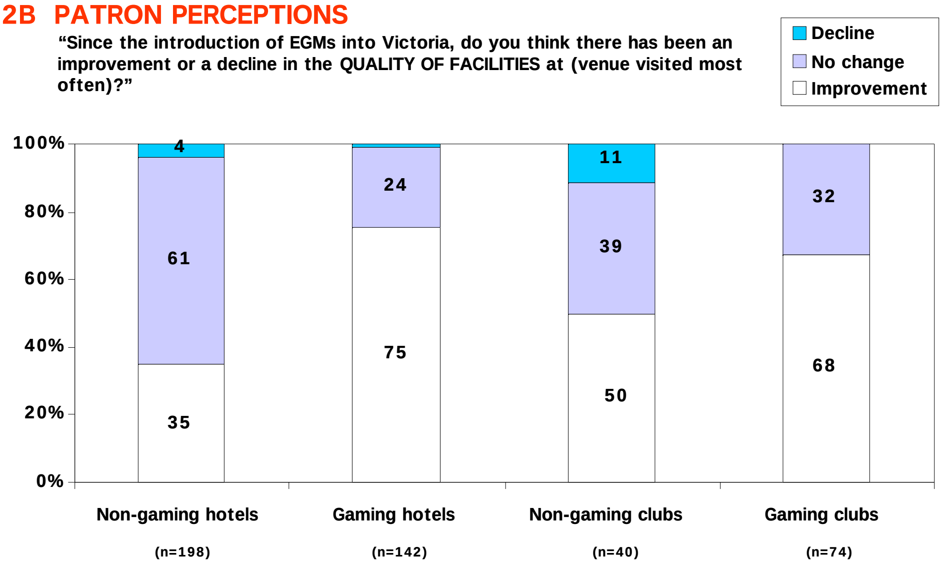
"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the QUALITY OF FACILITIES at your establishment?"



Base: All respondents answering

5.2B PATRON PERCEPTIONS

"Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the QUALITY OF FACILITIES at (venue visited most often)?"



Base: All respondents answering

5.2 Quality of Facilities

Consistent with the previous section on venue expenditure, a higher proportion of gaming venues than non-gaming venues reported to have made improvements to facilities. Approximately 86% of gaming hotels and 89% of gaming clubs reported an improvement, compared to 37% of non-gaming hotels and 26% of non-gaming clubs (see Figure 5.2A).

The main facilities reported to have been improved by **gaming venues** were:

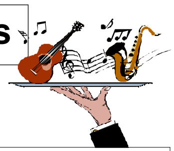
- Venue renovated/improved (37%);
- Venue refurbished (32%);
- More facilities (14%);
- Décor new or updated (12%);
- Toilets upgraded (12%);
- Dining area renovated (8%);
- Venue bigger or more spacious (7%); and
- Bar area renovated (7%).

The main facilities reported to have been improved by **non-gaming venues** were less likely to be major renovations and included:

- Venue renovated/improved (35%);
- Venue refurbished (17%);
- Venue painted (17%);
- Décor new or updated (12%);
- Improved carpeting (11%)
- General maintenance of venue (11%)
- Toilets upgraded (9%); and
- Bar area renovated (8%).

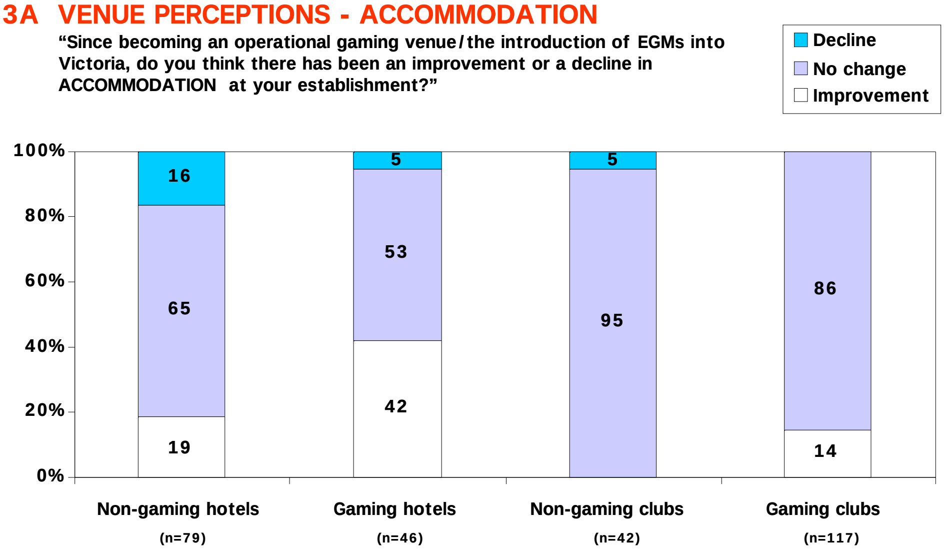
Patron perceptions of changes in the quality of facilities are consistent with that reported by venues. Approximately 75% of gaming hotel patrons and 68% of gaming club patrons reported an improvement in the quality of facilities. In comparison only 35% of non-gaming hotel patrons and 50% of non-gaming club patrons reported an improvement (see Figure 5.2B).

Accommodation & Conference Facilities



5.3A VENUE PERCEPTIONS - ACCOMMODATION

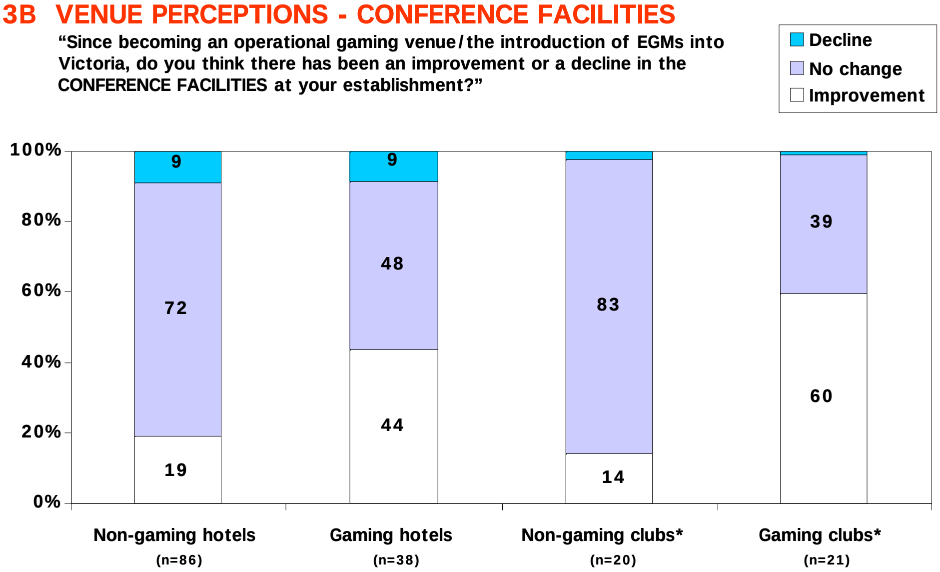
"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in ACCOMMODATION at your establishment?"



Base: All respondents answering

5.3B VENUE PERCEPTIONS - CONFERENCE FACILITIES

"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the CONFERENCE FACILITIES at your establishment?"



Base: All respondents answering

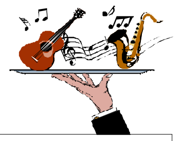
5.3 Accommodation and Conferences Facilities

Gaming hotels were the most likely to report improvements in accommodation opportunities (42%). Only 14% of gaming clubs and 19% of non-gaming hotels reported an improvement (see Figure 5.3A). Most improvements in accommodation opportunities were attributable to renovation or refurbishment of rooms.

Approximately 16% of non-gaming hotels reported a decline in accommodation. The main reasons reported by non-gaming venues for this decline were the reduction in the number of people using the venue for accommodation and a decrease in the standard of accommodation facilities.

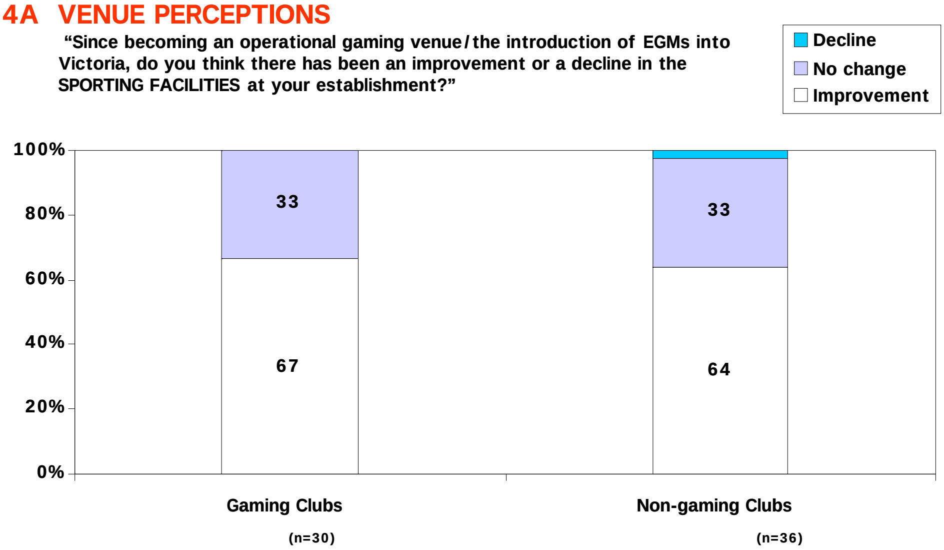
Despite small sample sizes, it is clear that gaming venues, particularly gaming clubs, have had the greatest improvement in conference facilities (see Figure 5.3B). Improvements to facilities, such as the addition of function rooms, have made these venues more appropriate for conferences.

Sporting Facilities



5.4A VENUE PERCEPTIONS

"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the SPORTING FACILITIES at your establishment?"



Base: All Sporting Clubs answering

5.4B PATRON PERCEPTIONS

"Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the SPORTING FACILITIES at (venue visited most often)?"

Base: All Club Patrons answering

5.4 Sporting Facilities

The majority of **clubs** reported an **improvement** in sporting facilities (see Figure 5.4B). The type of improvements to sporting facilities described were similar for gaming and non-gaming clubs and included the following:

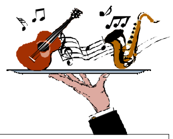
- Improvements to golf course;
- Improvements to bowling green;
- New sports stadiums;
- Shelters and seating for spectators;
- Storage sheds for sporting equipment;
- Extra funding of sporting teams; and
- Improved maintenance of existing facilities.

In contrast to that reported by venues, only 38% of gaming club **patrons** and 22% of non-gaming club patrons reported an improvement in sporting facilities. Approximately 15% of non-gaming club patrons reported a decline in sporting facilities (see Figure 5.4B).

The main reasons reported by **patrons** for the **decline** in sporting facilities were:

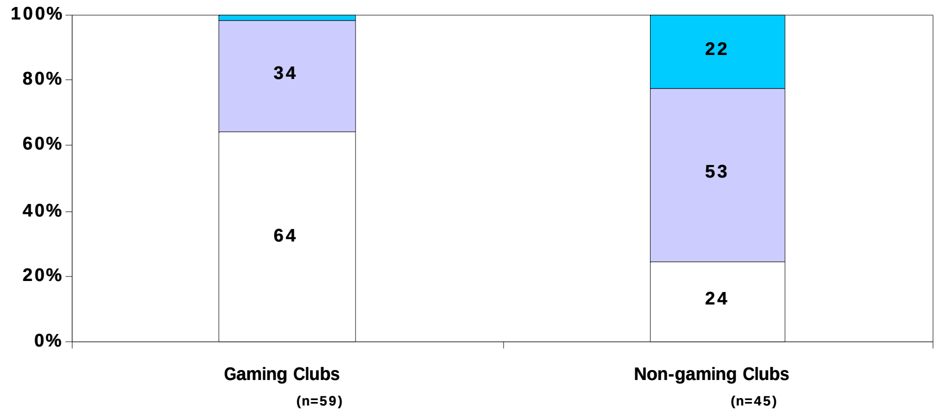
- Clubs do not have the money to improve facilities;
- Changes in leisure patterns of patrons; and
- Introduction of EGMs into Victoria.

Social Elements



5.5A VENUE PERCEPTIONS

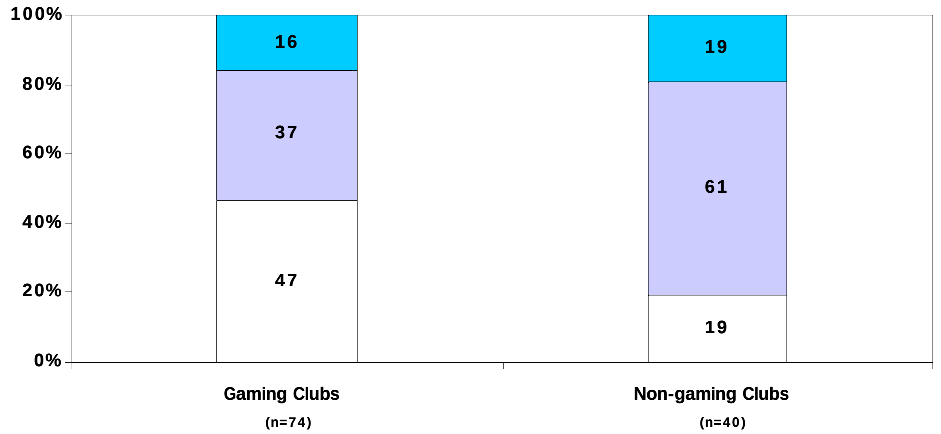
"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in SOCIAL ELEMENTS at your establishment?"



Base: All Club Venues answering

5.5B PATRON PERCEPTIONS

"Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the SOCIAL ELEMENTS at (venue visited most often)?"



Base: All Club Patrons answering

5.5 Social Element

Gaming clubs were more likely than non-gaming clubs to report an improvement in the social element of the venue. Approximately 64% of gaming clubs reported an improvement compared to 24% of non-gaming clubs (see Figure 5.5A).

The main reasons for an **improvement** in the social element reported by gaming clubs were:

- New or improved facilities have attracted new patrons or members;
- More functions or social activities for members;
- Meeting place for patrons;
- Extended trading hours; and
- Friendly atmosphere of venue.

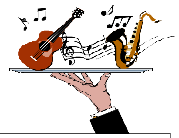
Approximately 22% of non-gaming clubs reported a **decline** in the social element of their club. The main reason for the reduction in the social element at non-gaming clubs is the reduction in members or patronage.

As illustrated by Figure 5.5B, 47% of gaming club patrons report an improvement in the social element. In contrast, only 19% of non-gaming club patrons reported an improvement in the social element. Patrons reported similar reasons as venues for the improvement in the social element at venues.

Approximately 19% of non-gaming club patrons reported a decline in the social element. A reduction in the level of patronage, in part due to people preferring gaming venues, was attributed to the decline at non-gaming venues.

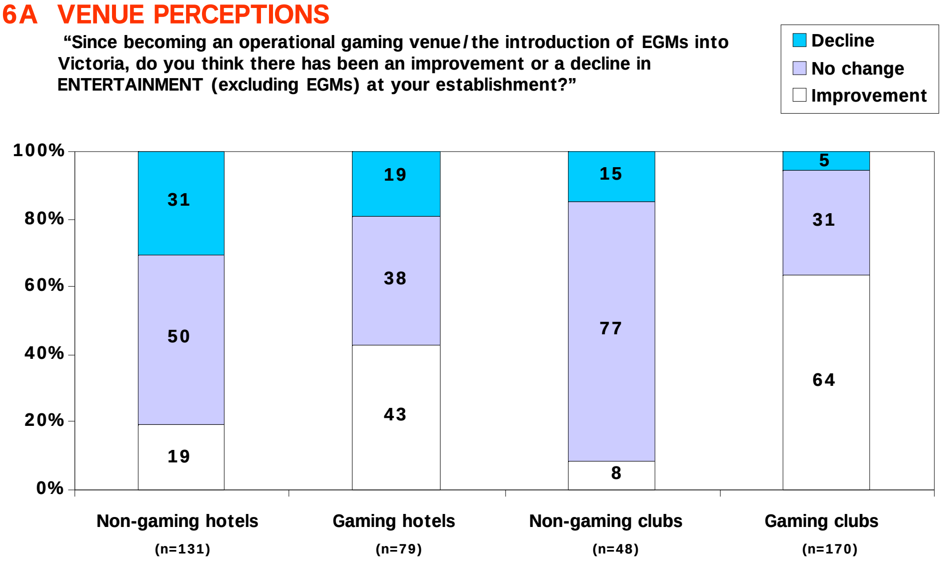
It is interesting to note that contrary to what was reported by gaming clubs, 16% of patrons perceive a decline in the social element of gaming clubs. These patrons perceive EGMs to be anti-social and believe people playing the EGMs prefer to gamble rather than socialise.

Entertainment



5.6A VENUE PERCEPTIONS

"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in ENTERTAINMENT (excluding EGMs) at your establishment?"



Base: All respondents answering

5.6B PATRON PERCEPTIONS

"Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in ENTERTAINMENT (excluding EGMs) at (venue visited most often)?"

Base: All respondents answering

5.6 Entertainment

Approximately 43% of **gaming** hotels and 64% of gaming clubs reported an **improvement** in opportunities for entertainment (excluding EGMs) since becoming an operational gaming venue (see Figure 5.6A).

The main aspects of entertainment gaming venues reported to have improved were:

- Amount of entertainment (43%);
- Quality of entertainment (24%);
- Improved facilities for live entertainment (22%); and
- Variety of entertainment (19%).

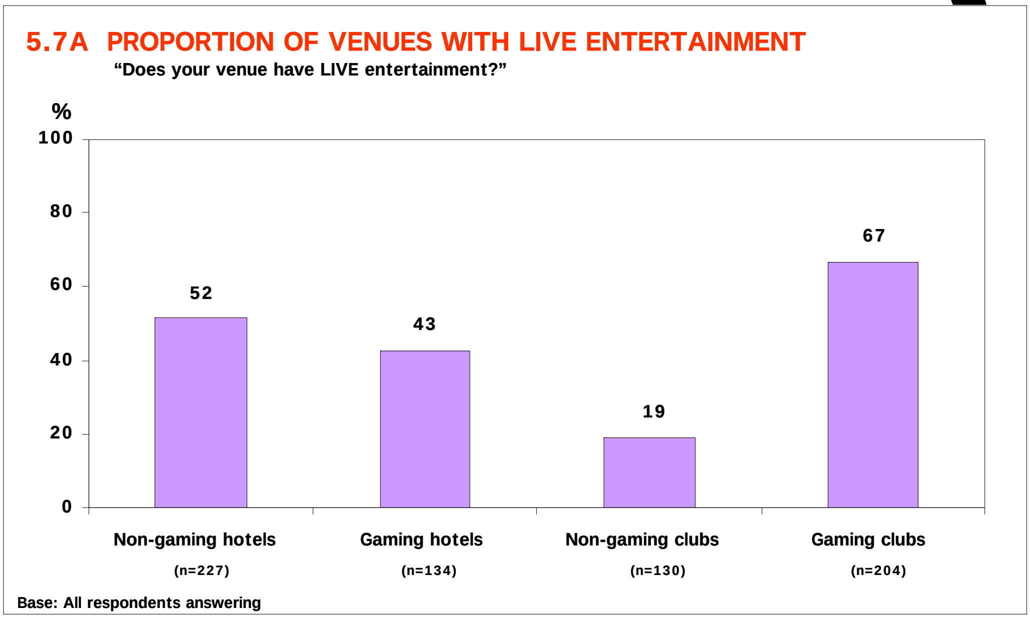
Approximately 19% of **gaming hotels** reported a **decline** in opportunities for entertainment. A decline in the amount of entertainment at these venues is associated with a decrease in the facilities for live entertainment, mostly a reduction in floor space from the introduction of gaming machines.

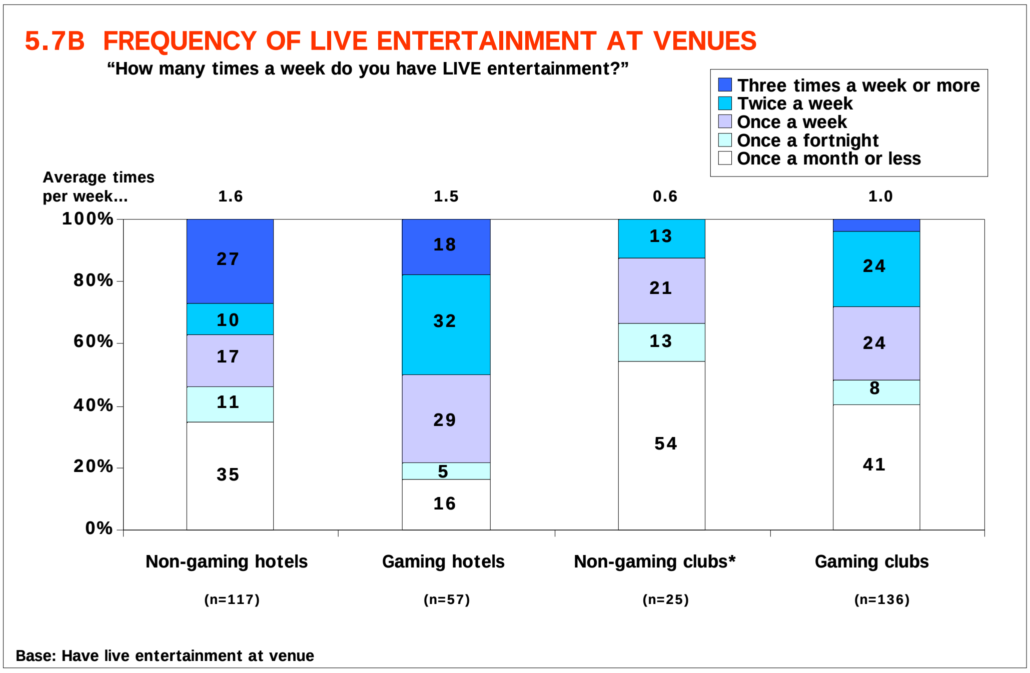
Only 19% of **non-gaming** hotels and 8% of non-gaming clubs reported an **improvement** in opportunities for entertainment. The majority of non-gaming venues who reported improved opportunities pointed to an increase in the amount of entertainment in an attempt to increase patronage and be competitive.

Nearly a third of **non-gaming hotels** reported a **decline** in entertainment opportunities since the introduction of EGMs into Victoria. The main aspects associated with this decline include a decrease in patronage, patrons preference to gamble or play EGMs and the inability of non-gaming venues to afford entertainment.

The majority of **patrons** perceive **no change** in opportunities for entertainment (excluding EGMs) since the introduction of EGMs into Victoria. Although 32% of gaming hotel patrons and 40% of gaming club patrons reported an improvement in entertainment opportunities. In comparison only 21% of non-gaming hotel patrons and 17% of non-gaming club patrons reported such an improvement (see Figure 5.6B).

Live Entertainment





*Caution: Small sample sizes

5.7 Live Entertainment

Venues were also asked in more detail of the nature and amount of live entertainment provided. Currently 43% of gaming hotels and 67% of gaming clubs provide live entertainment. In comparison, 52% of non-gaming hotels and only 19% of non-gaming clubs provide live entertainment (see Figure 5.7A).

Venues with live entertainment are more likely to provide cover bands than other forms of entertainment (see Table 5.7.1). Gaming hotels are the least likely to provide opportunities for original bands. Only 30% of gaming hotels with live entertainment have original bands, compared to 41% of non-gaming hotels and 39% of gaming clubs. Gaming clubs appear to offer the widest variety of types of live entertainment.

Table 5.7.1 Type of Live Entertainment Provided
(Base: Venues that provide live entertainment)

Lower than average (box)
Higher than average (oval)

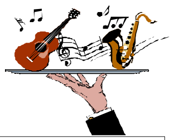
Entertainment Type	Non-gaming Hotel *(n=117)*	Gaming Hotels *(n=117)*	Non-gaming Club *(n=25)*	Gaming Club *(n=136)*
Cover Bands.................	61.5	64.9	56.0	66.9
Original Bands.............	41.0	$\boxed{29.8}$	44.0	39.0
Solo acts.......................	42.7	36.8	36.0	59.6
Duo acts	43.6	38.6	28.0	55.9
Cabaret	4.3	12.3	12.0	32.4
Comedians	8.5	14.0	12.0	33.8
Children's entertainers..	0.9	8.8	4.0	14.7
TOTAL	100.0	100.0	100.0	100.0

Change in type of gigs since the introduction of EGMs into Victoria reported by **entertainers** and **agents** of entertainers include the following:

- Increased demand for cover bands, rather than original bands;
- Background music rather than dance music;
- Solo or duo acts rather than larger bands;
- Less money spent on entertainment /less gigs available;
- More cabaret shows; and
- Venues want more professional/better quality acts.

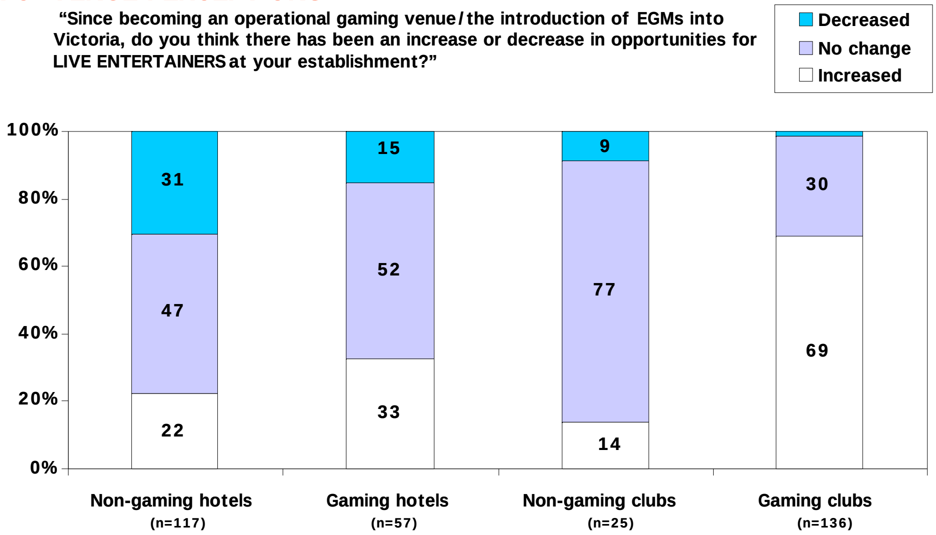
Of those venues with live entertainment, non-gaming hotels provide it most frequently. On average non-gaming hotels provide live entertainment 1.6 times per week. Over a quarter of non-gaming hotels have live entertainment at least 3 times a week (see Figure 5.7B). Although a large proportion of gaming clubs have live entertainment, the frequency is quite low at an average of once a week. Over 40% of gaming club venues reported to have live entertainment at their venue only once a month or less.

Live Entertainment



5.7C VENUE PERCEPTIONS

"Since becoming an operational gaming venue/the introduction of EGMs into Victoria, do you think there has been an increase or decrease in opportunities for LIVE ENTERTAINERS at your establishment?"



Base: All venues with live entertainment answering

5.7D PATRON PERCEPTIONS

"Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in LIVE ENTERTAINMENT at…?"

Base: Have seen live entertainment at hotels/clubs in the last 6 months (n=196)

As illustrated by Figure 5.7C, gaming clubs were much more likely than gaming hotels to have reported an improvement in opportunities for live entertainers at their venue since becoming an operational gaming venue (69% compared with 33% respectively).

The main contributors to the **increase** in opportunities for live entertainers reported by **gaming venues** were:

- Facility improvements (32%);
- Increased patronage (21%);
- More live entertainment (8%);
- Improved financial position (7%); and
- People want live entertainment (7%).

Only 22% of non-gaming hotels and 14% of non-gaming clubs reported an increase in opportunities for live entertainers at their venue since the introduction of EGMs into Victoria. The main contributors to this increase in opportunities for live entertainers reported by non-gaming venues were due to attempts by venues to attract patrons or patron demand for live entertainment.

Approximately 31% of non-gaming hotels reported a decline in opportunities for live entertainers. The main contributors to this **decline** reported by **non-gaming hotels** were:

- Venue cannot afford live entertainment;
- Decline in patronage at venue;
- People prefer gambling;
- EGMs subsidise live entertainment at gaming venues; and
- Competition from gaming venues.

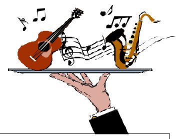
In comparison only 15% of gaming hotels reported a decline in opportunities for live entertainers with the main reasons being EGMs are taking up space and patrons prefer playing EGMs.

As illustrated by Figure 5.7D, **patrons** are just as likely to perceive a decline in live entertainment at gaming venues as non-gaming venues. Of those patrons that have seen live entertainment at hotels or clubs in the last 6 months, 31% believe there has been a decline in live entertainment at non-gaming hotels. Similarly, 34% of patrons believe there has been a decline at gaming hotels. Only 23% of patrons perceive a decline in live entertainment at clubs.

Approximately one third of patrons perceive an improvement in live entertainment at gaming venues. Many patrons associated this improvement with an increase in the quality and the quantity of live entertainment as a result of EGMs subsidising entertainment and venues attempting to attract patrons.

In comparison, 33% of patrons reported an improvement at non-gaming hotels and 20% at non-gaming clubs. The improvement in the quality and quantity of live entertainment at non-gaming venues was associated with venues attempting to compete with gaming venues and also to attract patrons.

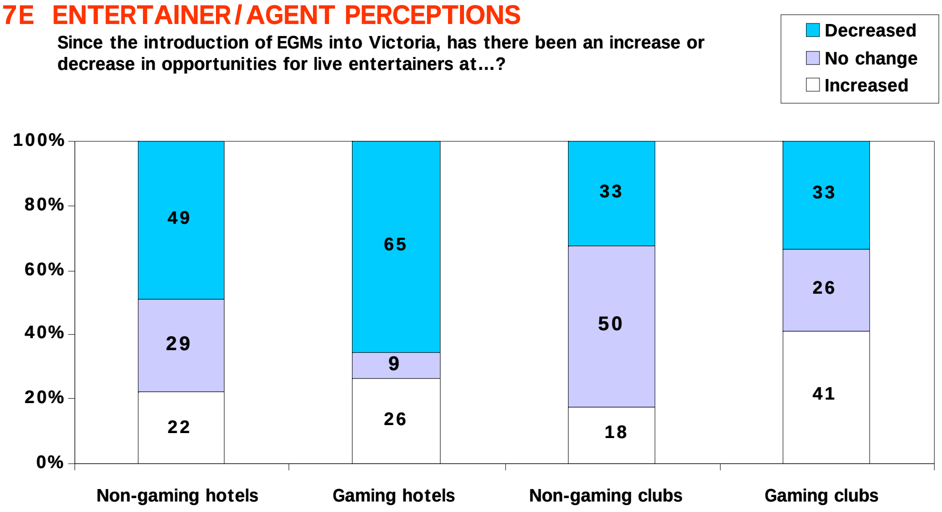
Live Entertainment



ENERTAINERS/AGENTS

5.7E ENTERTAINER/AGENT PERCEPTIONS

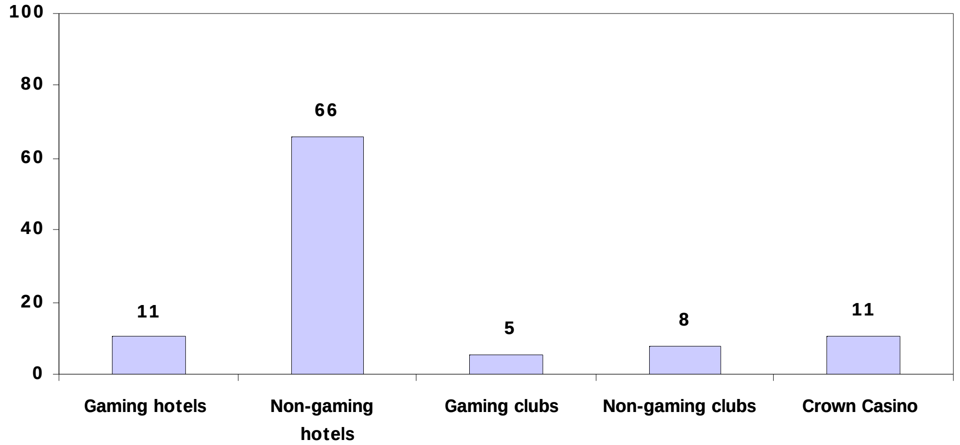
Since the introduction of EGMs into Victoria, has there been an increase or decrease in opportunities for live entertainers at...?



Base: All respondents (n=51)

5.7F CURRENT WORK

Which type of venue do you work/place entertainers most frequently?



Base: Agents/entertainers currently working (n=38)

Approximately half of the **entertainers** and **agents** of entertainers reported a decline in the opportunities for live entertainers at non-gaming hotels since the introduction of EGMs into Victoria. The situation appears worse at gaming hotels with 65% of entertainers or agents reporting a decline. A third of entertainers and agents reported a decline at club venues (see Figure 5.7E).

The majority of entertainers reporting a decline in opportunities at gaming venues attribute this decline to the introduction of EGMs. Entertainers believe people at these venues prefer to gamble rather than enjoy live entertainment, that EGMs have taken up space and that gaming venues no longer require live entertainment to attract patrons.

The main reason reported by entertainers for the decline in opportunities at non-gaming venues was the introduction of EGMs resulting in a reduction in patronage at non-gaming venues, competition from gaming venues, and reduced entertainment budgets at non-gaming venues.

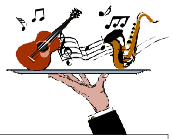
Approximately 26% of entertainers reported an increase in opportunities at gaming hotels and 41% at gaming clubs, associated with an increase in patronage and venues being able to afford live entertainment.

As illustrated by Figure 5.7F, the majority of entertainers and agents reported that they work or place entertainers most frequently at non-gaming hotels.

Of those entertainers or agents currently working, 39% reported a decline in the number of gigs obtained in 1998 compared with 1997, with the majority of these reporting a significant decline. Although 36% of entertainers reported an increase in the number of gigs, the majority of these reported the increase to be only marginal (see Figure 5.7G). Gaming was reported by the majority of entertainers as the reason for the reduction in the number of gigs. None of the entertainers reporting an improvement in the number stated the introduction of gaming as the reason, rather self promotion was most likely to be the reason for the increase.

As illustrated by Figure 5.7H the majority of entertainers surveyed (57%) reported that opportunities for entertainers had increased since the opening of the Crown Casino, whereas 30% reported a decline.

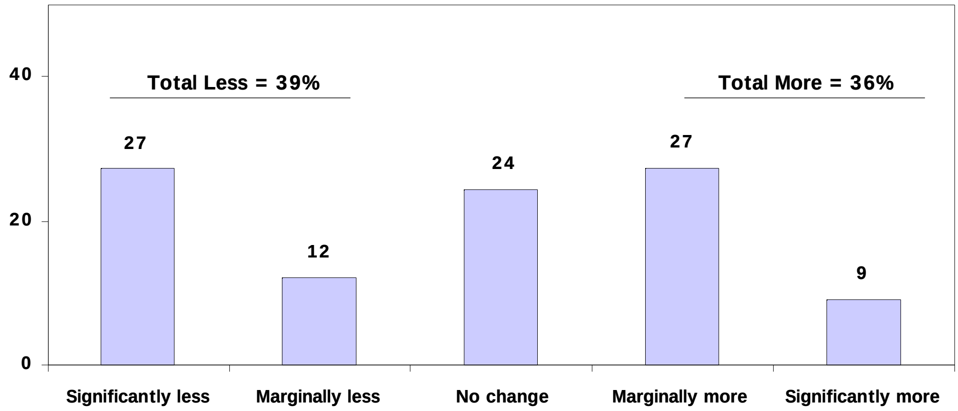
Live Entertainment



ENERTAINERS/AGENTS

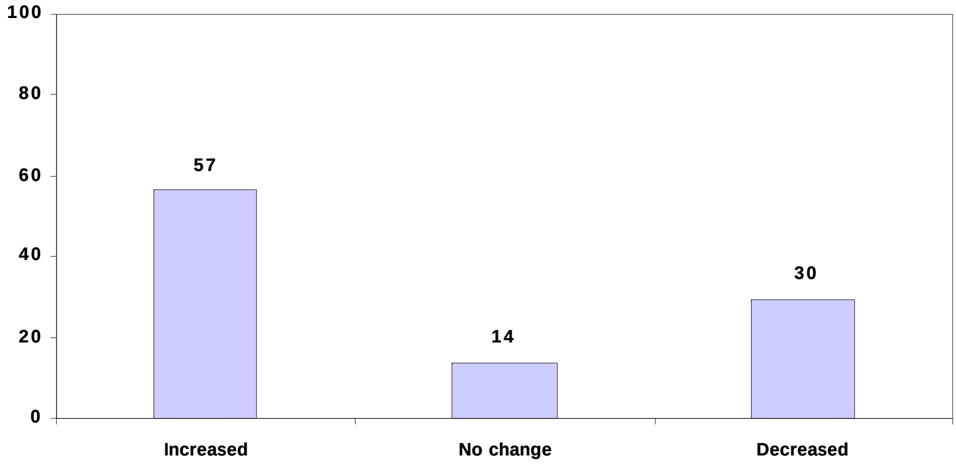
5.7G CHANGES IN NUMBER OF GIGS

Would you say the number of gigs that you arranged/had in 1998 as compared with 1997 was...?



Base: Agents/entertainers currently working (n=38)

5.7H OPPORTUNITIES FOR ENTERTAINERS SINCE OPENING OF THE CROWN CASINO



Base: All respondents (n=51)

6.0

SECTION 6.0

Impact of the Introduction of EGMs on the Market Profile

Current Market Profile

6.1A CURRENT MARKET PROFILE BY TYPE OF VENUE VISITED MOST OFTEN

	TOTAL (n=454)	Non-gaming hotels (n=198)	Gaming hotels (n=142)	Non-gaming clubs (n=40)	Gaming clubs (n=74)
	%	%	%	%	%
GENDER					
– ·	59.0	51.0	66.2	70.0	60.8
Male...................	41.0	49.0	33.8	30.0	39.2
AGE					
....	13.2	22.2	4.9	12.5	5.4
....	20.3	27.8	19.7	12.5	5.4
....	29.1	28.8	31.0	32.5	24.3
....	15.6	12.1	17.6	15.0	21.6
....	11.7	5.6	16.9	15.0	16.2
....	10.1	3.5	9.9	12.5	27.0
LIFECYCLE					
......	18.1	31.3	7.0	7.5	9.5
.....	10.4	15.2	7.7	7.5	4.1
......	15.4	16.7	18.3	17.5	5.4
.....	17.0	12.6	18.3	22.5	23.0
.....	11.7	8.1	19.0	5.0	10.8
....	16.5	9.6	12.7	30.0	35.1
.....	11.0	6.6	16.9	10.0	12.2
LANGUAGE BACKGROUND					
English Speaking	85.2	85.4	83.8	95.0	82.4
Non-English Speaking	14.8	14.6	16.2	5.0	17.6

Base: All respondents to Patron Survey

Higher than average Lower than average

6.0 IMPACT OF INTRODUCTION OF EGMs ON THE MARKET PR0FILE

To investigate the impact of the introduction of EGMs on the market profile of hotels and clubs, venues were asked to describe any changes in the type of patrons visiting their venue. Venues were also asked to describe any changes in the target markets they have attempted to attract. In addition, results from the Patron Survey have been used to further define the current market profile of venues.

6.1 Current Market Profile

Results from the Patron Survey have been used to obtain a current market profile for each of the venue types. Figure 6.1A shows the profile of venue patrons in terms of gender, age, lifecycle and language background. Figure 6.1B shows the profile of venue patrons in terms of employment status, occupation and income.

The profile of patrons who most often visit **non-gaming hotels** indicates a higher than average proportion of males. Non-gaming hotel patrons also represent a higher than average proportion of younger age groups and young singles. In comparison, **gaming hotels** have a lower than average representation of young singles. **Gaming clubs** have a higher than average representation of older patrons, particularly people over the age of 65 and older couples.

Approximately 56% of patrons who visit non-gaming hotels most often are in full time employment, which is significantly higher than the average of 46%. Non-gaming hotels also have a lower than average proportion of patrons who are not employed in the work force. In comparison, gaming clubs have a higher than average representation of people not employed in the work force, and a lower than average proportion of full time employed and patrons with a professional occupation.

Non-gaming patrons appear to visit non-gaming venues slightly more frequently than gaming patrons visit gaming venues (see Figure 6.1C). Approximately 30% of non-gaming hotel patrons visit non-gaming hotels once a week or more, whereas 23% of gaming hotel patrons visit gaming hotels this frequently. Despite small sample sizes, non-gaming club patrons seem to visit non-gaming clubs more frequently than gaming club patrons visit gaming clubs (see Figure 6.1D).

Current Market Profile

6.1B CURRENT MARKET PROFILE BY TYPE OF VENUE VISITED MOST OFTEN

	TOTAL (n=454)	Non-gaming hotels (n=198)	Gaming hotels (n=142)	Non-gaming clubs (n=40)	Gaming Clubs (n=74)
	%	%	%	%	%
EMPLOYMENT STATUS					
Full time	45.8	56.6	41.5	37.5	29.7
	20.9	20.7	23.9	20.0	16.2
	11.2	5.1	14.8	12.5	20.3
	7.0	11.6	2.8	5.0	4.1
	5.1	2.0	4.9	15.0	8.1
	7.7	2.0	10.6	10.0	16.2
	2.2	2.0	1.4	0.0	5.4
OCCUPATION					
	8.6	12.1	6.3	5.0	5.4
	18.5	22.7	17.6	20.0	8.1
	7.5	8.6	8.5	5.0	4.1
	9.5	10.6	8.5	5.0	10.8
	8.8	8.1	10.6	10.0	6.8
Sales/personal service	8.1	8.1	9.9	7.5	5.4
Plant/machine operators &	0.9	1.0	0.7	0.0	1.4
	4.8	6.1	3.5	5.0	4.1
	33.3	22.7	34.5	42.5	54.1
SHIFT WORK					
	16.2	15.7	22.6	8.7	5.9
	83.8	84.3	77.4	91.3	94.1
INCOME					
	14.8	12.6	15.5	10.0	21.6
	13.8	14.2	15.5	17.5	8.2
	16.5	15.1	17.6	12.5	20.3
	10.6	10.6	9.8	10.0	12.2
	14.5	18.2	14.8	15.0	4.1
	5.0	5.0	5.6	2.5	5.5
	12.8	15.2	9.9	7.5	14.9
	11.9	9.1	11.3	25.0	13.5

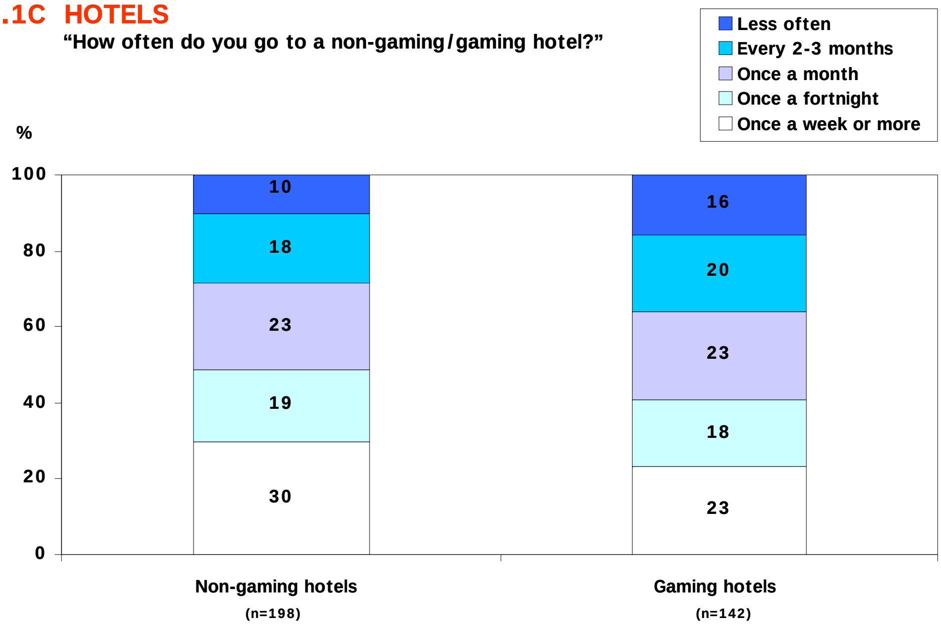
Base: All respondents to Patron Survey

Higher than average   Lower than average

Frequency of Visitation to Venues

6.1C HOTELS

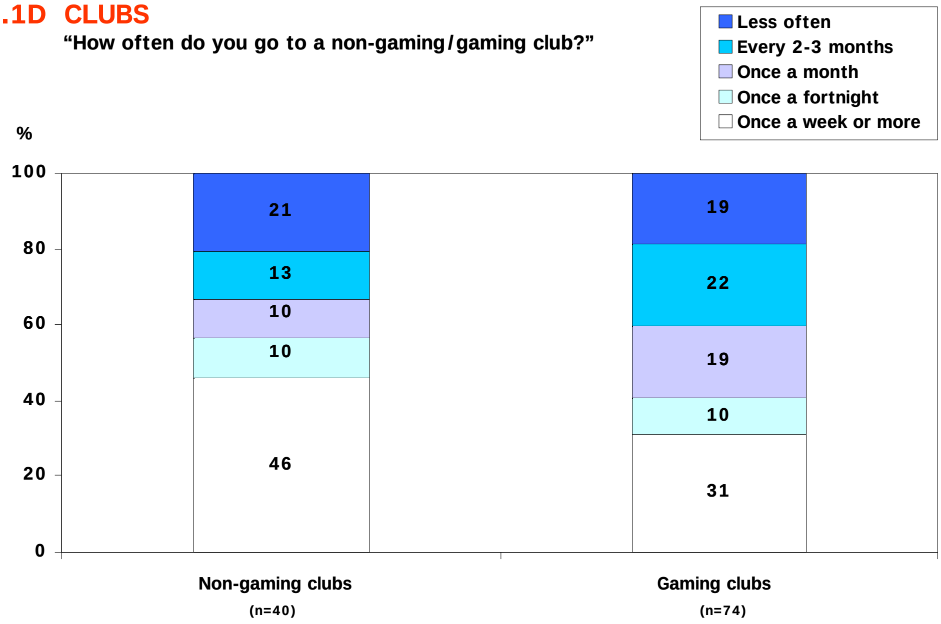
"How often do you go to a non-gaming/gaming hotel?"



Base: Venue type visited the most often

6.1D CLUBS

"How often do you go to a non-gaming/gaming club?"

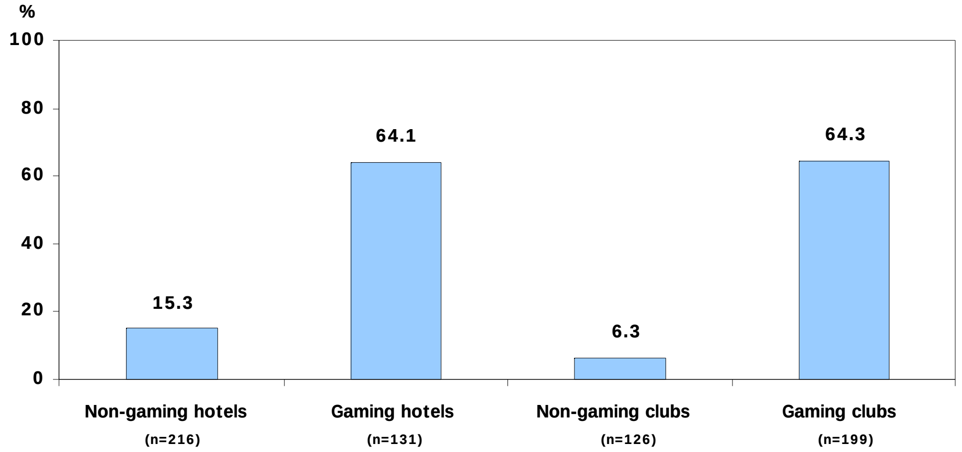


Base: Venue type visited the most often

Venue Perceptions of Changes in Market Profile Since the Introduction of EGMs

6.2A PROPORTION REPORTING A CHANGE

"Have you noticed a change in the type of people coming to your venue since becoming an operation gaming venue/since the introduction of EGMs into Victoria?"



Base: All respondents answering

6.2B DECRIPTION OF CHANGES TO PATRONAGE

GAMING HOTELS (n=84)

	%
Older patrons (65+)	30
Female patrons	22
Wide cross section of the community....	12
Respectable & sophisticated patrons	11
Middle aged patrons (40-65)..................	10
Business people	10
Shift workers...........	10
Greater cross section of ages........	7

GAMING CLUBS (n=128)

	%
Gaming members and non members ...	34
Female patrons	21
More multicultural ..	11
Older patrons (65+)	11
Gaming patrons	9
Wide cross section of the community....	8
Greater cross section of the community.............	8
Middle aged patrons (40-65)...................	8

NON GAMING VENUES (n=41)

	%
People who dislike EGMs......................	22
Decrease in patrons.	15
Younger patrons......	12
Female patrons........	10
Wider geographic area........................	7
Business people.......	5

Base: Reported change in patron type

6.2 Perceptions of Change in Market Profile

Gaming venues were asked if they had noticed a change in the type of patrons visiting their venue since becoming an operational gaming venue. Similarly non-gaming venues were asked if they had noticed a change in their market profile since the introduction of gaming into Victoria.

Approximately 64% of gaming venues noticed a change in the type of patrons coming to their venue since becoming an operational gaming venue. Non-gaming venues were less likely to notice a change. Only 15% of non-gaming hotels and 6% of non-gaming clubs reported noticing a change in the type of people coming to their venue since the introduction of EGMs into Victoria (see Figure 6.2A).

Figure 6.2B details the changes noticed by venues. An increase in females was reported by all venues types, although by a higher proportion of gaming venues (approximately 20%) than non-gaming venues (10%).

In addition to an increase in females, the main changes noticed by gaming hotels were an increase in the number of older patrons and representation from a wider cross-section of the community. Gaming clubs reported an increase in gaming members or non-members and patrons from a greater mix of cultural backgrounds.

Non-gaming venues reported increased patronage from people who dislike gaming and an increase in younger patrons. Approximately 15% of non-gaming venues reported a decline in patronage.

Patrons were asked if they had made any changes to the frequency of attending hotels and clubs since the introduction of EGMs into Victoria (see Figure 6.2C and Figure 6.2D). Of those patrons who currently visit non-gaming hotels the most, 20% reported a decline in their frequency of visitation to hotels and clubs and only 8% reported an increase. Similarly 23% of non-gaming club patrons reported a decline in frequency of visitation, although 15% reported an increase.

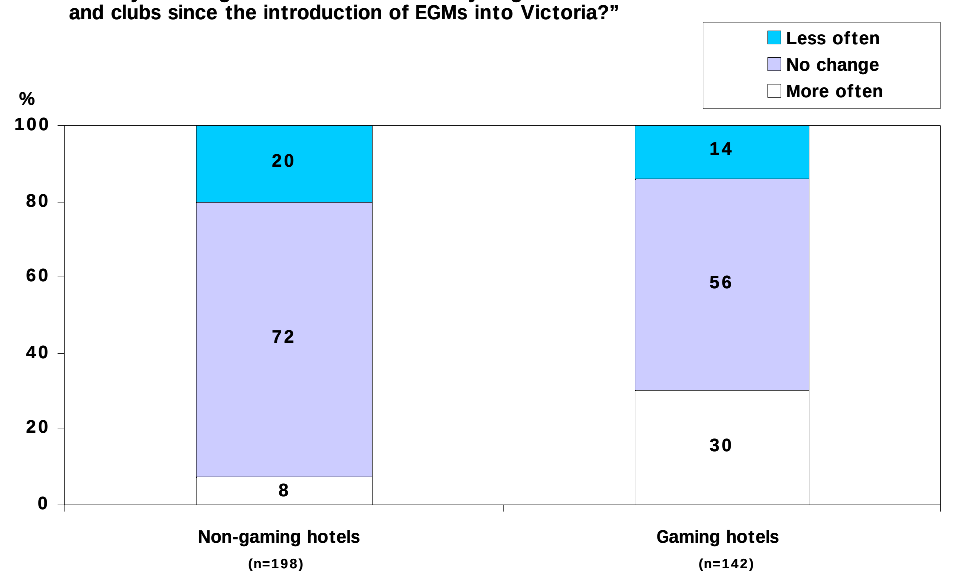
In comparison, 30% of gaming hotel patrons and 31% of gaming club patrons reported an increase in their frequency of visitation to hotels and clubs since the introduction of EGMs into Victoria.

Reasons for these changes in frequency of visitation are explored in Section 7.2.

Change in Patronage

6.2C HOTELS

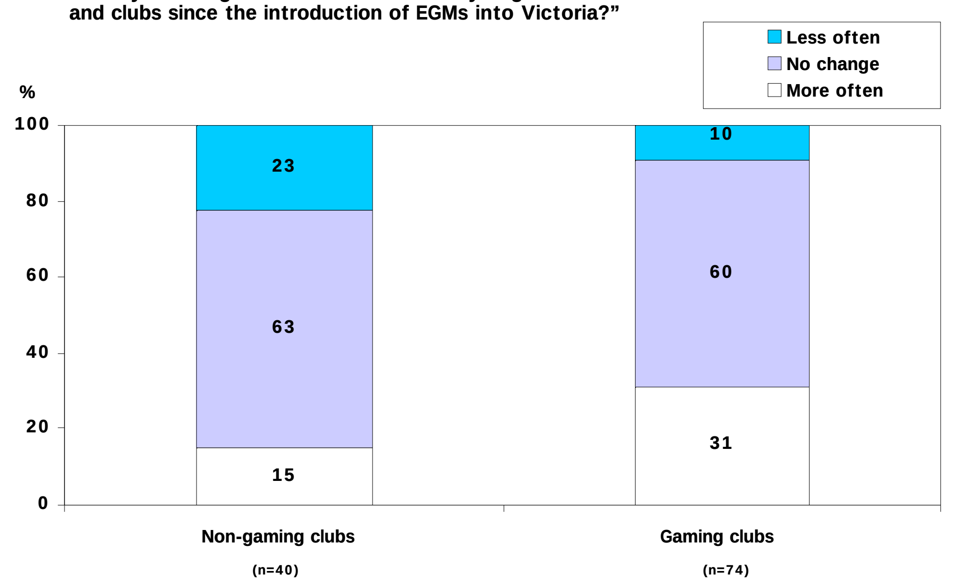
"Have you changed the number of times you go to hotels and clubs since the introduction of EGMs into Victoria?"



Base: Venue type visited the most often

6.2D CLUBS

"Have you changed the number of times you go to hotels and clubs since the introduction of EGMs into Victoria?"

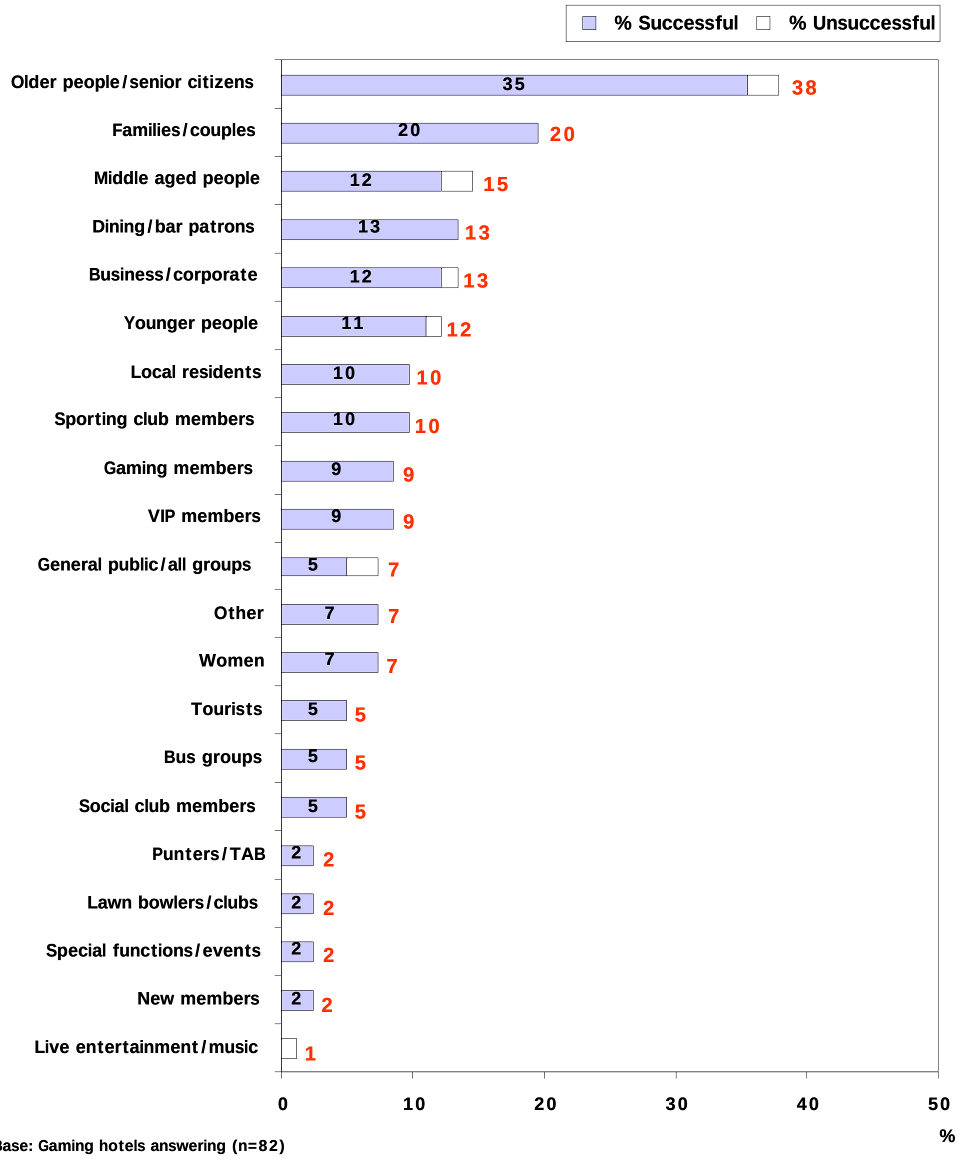


Base: Venue type visited the most often

Target Markets

6.3A GAMING HOTELS

"Since becoming an operational gaming venue, what type of new groups or target markets have you attempted to attract to your venue? Were these endeavours successful?"



Base: Gaming hotels answering (n=82)

6.3 Changes in Target Markets

Gaming venues were asked to detail any new groups or target markets they have attempted to attract since becoming an operational gaming venues. Non-gaming venues were asked to describe any changes in target markets since the introduction of EGMs into Victoria in 1992. Venues were also asked to indicate if these endeavours were successful.

Approximately 38% of gaming hotels and 28% of gaming clubs have attempted to attract older patrons or senior citizens since becoming operational gaming venues, with most reporting this to be successful.

The other main target market that gaming hotels have attempted to attract include families or couples, middle aged people, dining and bar patrons and corporate clientele (see Figure 6.3A).

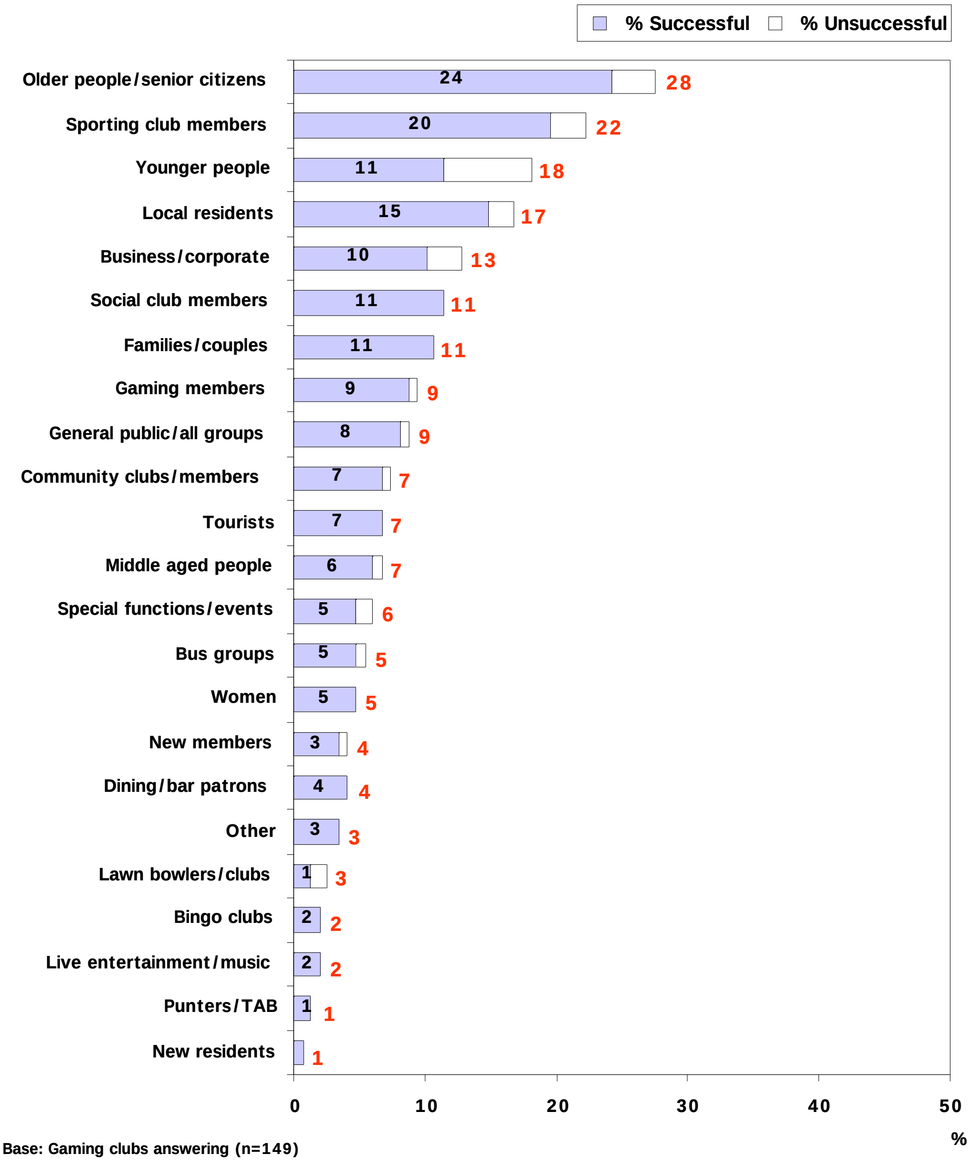
In addition to older patrons, gaming clubs have also attempted to attract members of sporting clubs. Approximately 18% of gaming clubs have attempted to attract younger people although many venues were not successful (see Figure 6.3B).

The main target market **non-gaming** venues have attempted to attract are **younger** people. Non-gaming clubs have attempted to attract members from other sporting clubs. Special functions and events and also the bar and dining trade areas have been promoted to attract new patrons to non-gaming venues (see Figure 6.3C).

Target Markets

6.3B GAMING CLUBS

"Since becoming an operational gaming venue, what type of new groups or target markets have you attempted to attract to your venue? Were these endeavours successful?"

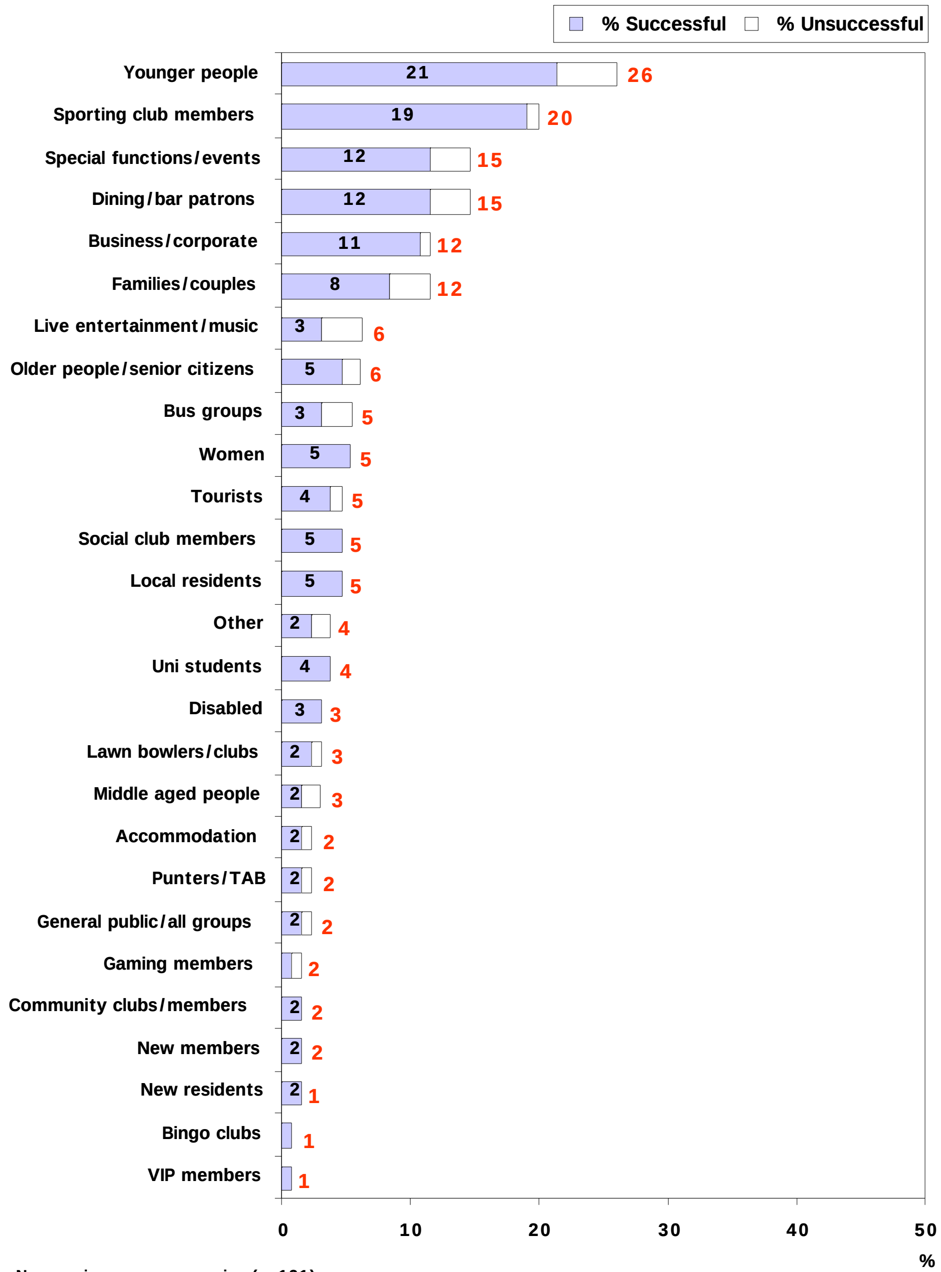


Base: Gaming clubs answering (n=149)

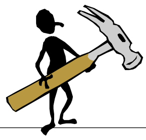
Target Markets

6.3C NON GAMING VENUES

"Since the introduction of EGMs into Victoria, what type of new groups or target markets have you attempted to attract to your venue? Were these endeavours successful?"



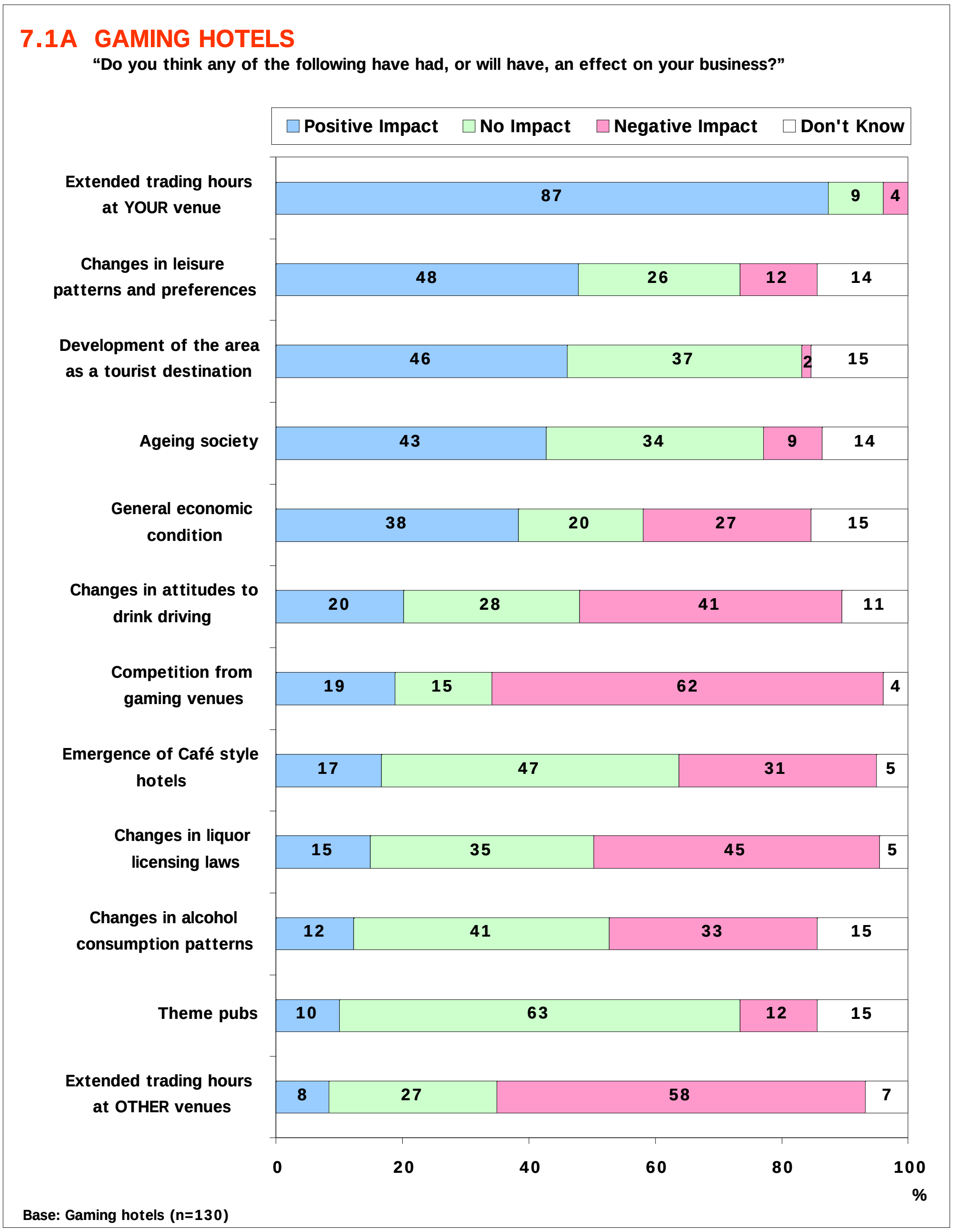
Base: Non-gaming venues answering (n=131)



SECTION 7.0

External Impacts: Venues, Patrons and Entertainers

External Impacts: Venues



7.0 EXTERNAL IMPACTS

When investigating the extent to which gaming is the reason for the changes observed in the hotel and club industry, it is also important to consider non-gaming developments in the industry including:

- ✓ General economic condition;
- ✓ Extended trading hours of venues;
- ✓ Changes in leisure patterns and preferences;
- ✓ Development of the surrounding areas as a tourist destination;
- ✓ Changes in alcohol consumption patterns;
- ✓ Changes in attitudes to drink driving;
- ✓ Ageing society;
- ✓ Changes to restaurant liquor licensing;
- ✓ Increase in the number of theme pubs; and
- ✓ Emergence of café style hotels.

7.1 Impact on Hotels and Clubs

Hotels and clubs were asked if any of the factors listed above have had an impact, either positive or negative, on their business.

Of those venues that had extended their trading hours, the majority reported it as having a positive impact on their venue. A very small number of venues reported the extension of trading hours as having a negative impact. Depth interviews with venues indicated that an extension of trading hours can have a negative impact as labour costs can exceed income for some venues.

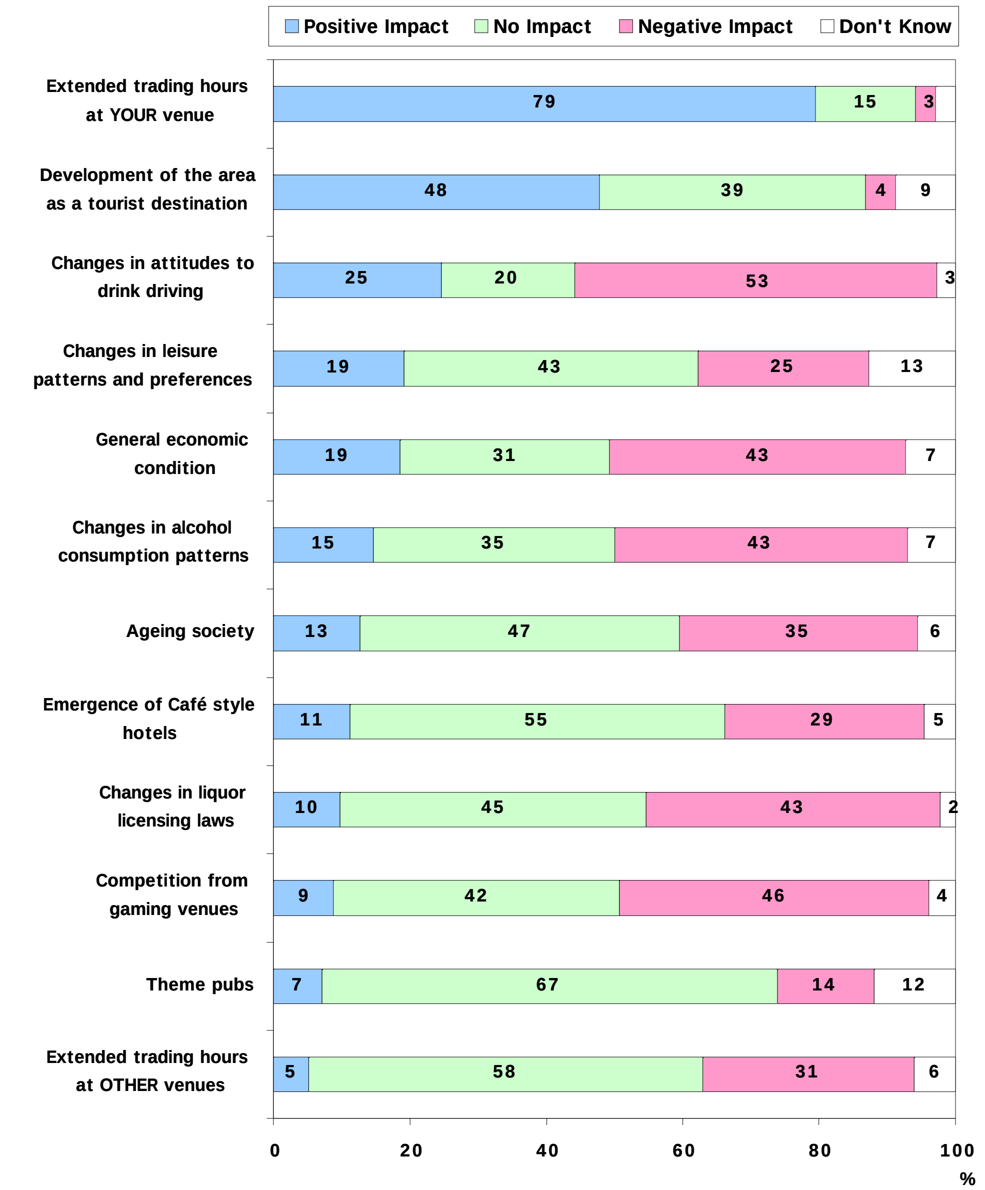
In addition to the extension of trading hours, **gaming hotels** were most likely to report changes in patron leisure patterns and preferences (48%) and the development of the area as a tourist destination (46%) as having a **positive** impact. Also 43% of gaming venues reported an ageing society as having a positive impact. This is not surprising given that the elderly are a main target market for gaming hotels and therefore an ageing society leads to an increase in patronage (see Figure 7.1A).

The aspects nominated by a high proportion of both **gaming hotels** and **gaming clubs** as having a **negative** impact on their business are competition from other gaming venues and the extending trading hours of other venues.

External Impacts: Venues

7.1B NON GAMING HOTELS

"Do you think any of the following have had, or will have, an effect on your business?"



Base: Non Gaming hotels (n=213)

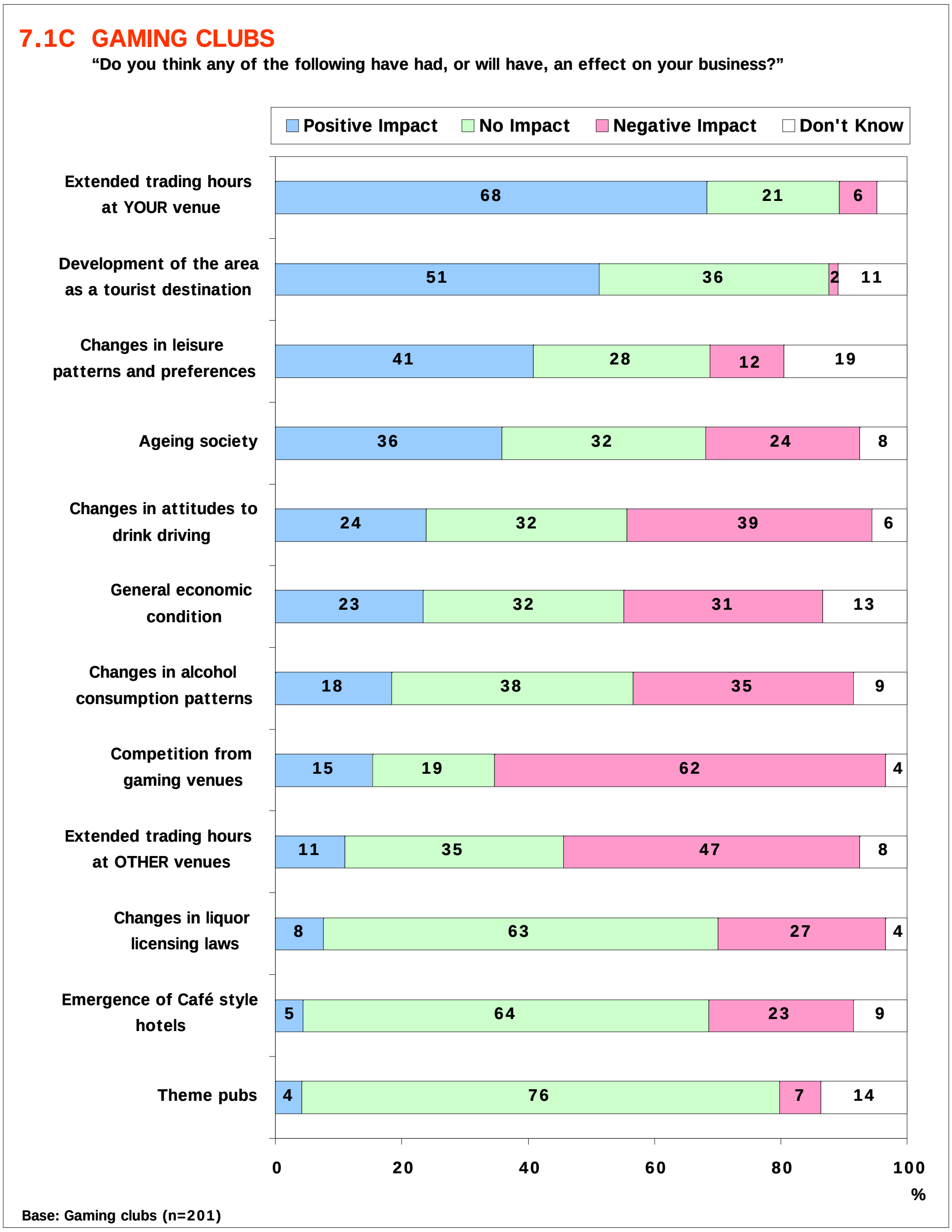
The Liquor Control Reform Act 1998 has permitted restaurants (with on-premises licenses under the 1987 Act) to sell liquor without the requirement that they sell a meal. However, restaurants must predominantly operate their business as a restaurant and have tables and chairs (including bar and stool settings) set out for dining for at least 75% of the customers on the premises at any one time.

In regards to these changes in liquor licensing, 43% of all **non-gaming hotels** believe this will have a **negative** impact on their venue. Gaming hotels are just as likely (45%) to report that these changes may have a negative impact. Hotels are more likely than clubs to see restaurants and cafes as a threat to their business. The main reason for reporting the changes in liquor licensing as having a negative impact is that restaurants and cafés are now *"another competitor in the market"*.

As illustrated by Figure 7.1B, the main aspect reported by **non-gaming hotels** as having a **positive** impact, other than extended trading hours, was the development of the area as a tourist destination. Venues in country areas (52%) were more likely than metropolitan venues (36%) to report that the development of the area as a tourist destination has had a positive impact. A quarter of non-gaming hotels reported changes in attitudes to drink driving as having a positive impact. Depth interviews revealed that changes in attitudes to drink driving are associated with less patrons drinking to excess creating a more pleasant environment for employees and patrons.

Approximately 46% of **non-gaming hotels** perceive competition from gaming venues to be having a **negative** impact on their business. Other aspects reported by a high proportion of non-gaming hotels as having a negative impact on their business include the general economic condition (43%), changes in attitudes to drink driving (53%) and changes in alcohol consumption patterns (43%).

External Impacts: Venues



Similar to that reported by gaming hotels, **gaming clubs** specified the development of the area as a tourist destination (51%) and changes in leisure patterns and preferences (41%) as having a positive impact on their business (see Figure 7.1C).

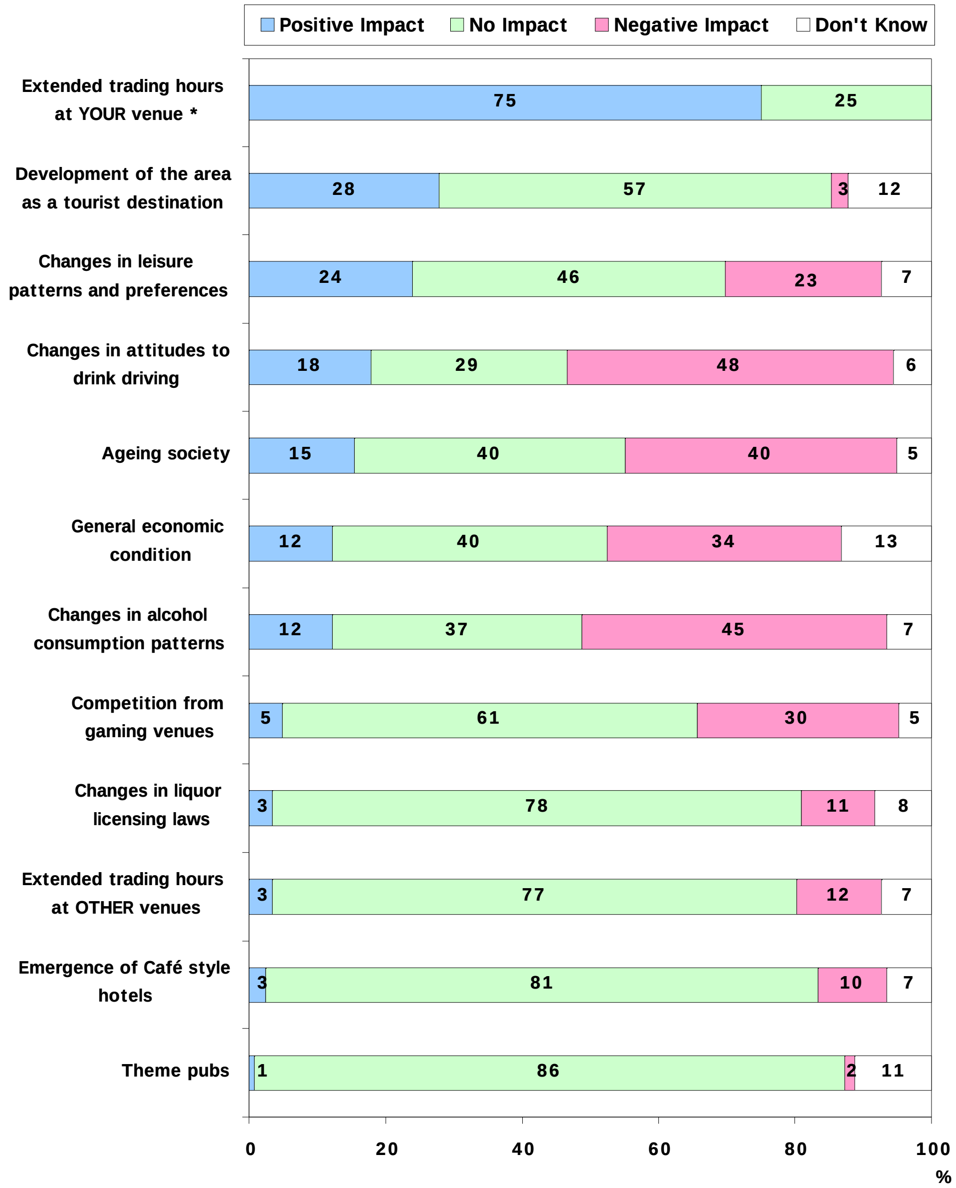
Approximately 30% of **non-gaming clubs** reported that competition from gaming venues has had a negative impact on their business, which is lower than that reported by all other venue types. It is possible that non-gaming clubs have a more loyal customer base than other venue types. However, changes in attitudes to drink driving (48%) and changes in alcohol consumption patterns appear to have had a significant impact on non-gaming clubs (Refer Figure 7.1D).

The majority of venues indicated that the increase in the number of theme pubs have had no impact on their business. Only 12% of gaming hotels and 14% of non-gaming hotels reported theme pubs as having a negative impact on their business. Although approximately 30% of hotels reported that the emergence of café style hotels has had a negative impact on their business.

External Impacts: Venues

7.1D NON GAMING CLUBS

"Do you think any of the following have had, or will have, an effect on your business?"

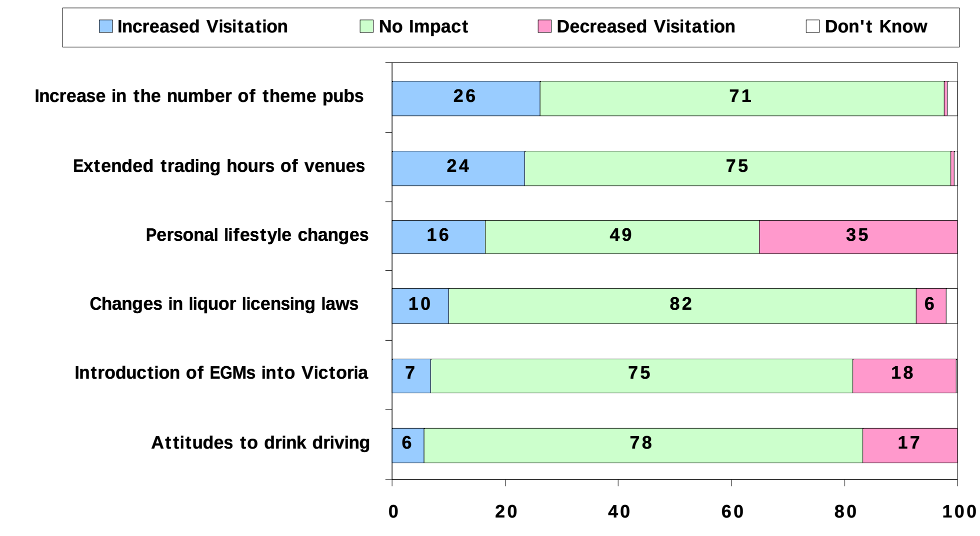


Base: Non gaming clubs (n=121) - with the exception of aspects shown with * which has very small sample size (n=8)

External Impacts: Patrons

7.2A VISIT NON-GAMING VENUES MOST OFTEN

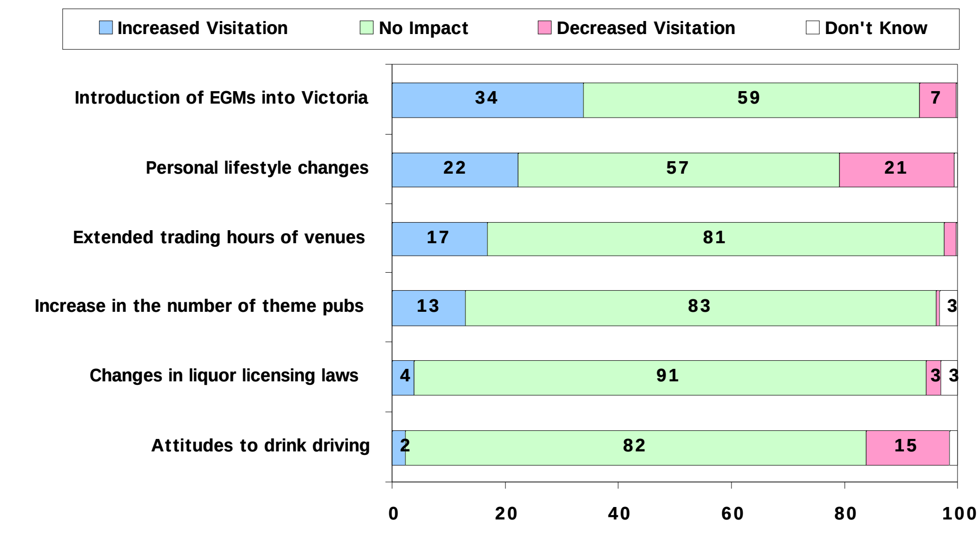
"Do you think any of the following have had an impact on the number of times you go to hotels and clubs?"



Base: Visit non gaming venues most often (n=238)

7.2B VISIT GAMING VENUES MOST OFTEN

"Do you think any of the following have had an impact on the number of times you go to hotels and clubs?"



Base: Visit gaming venues most often (n=215)

7.2 Impact on Patronage

Patrons were asked to specify whether any of the following aspects have had an impact, either positive or negative, on the number of times they visit hotels and clubs:

- ✓ Extended trading hours of venues;
- ✓ Attitudes to drink driving;
- ✓ Changes to restaurant liquor licensing;
- ✓ Increase in the number of theme pubs;
- ✓ Personal lifestyle changes; and
- ✓ Introduction of EGMs into Victoria.

Of those patrons who visit **non-gaming** venues most often, 26% reported that the **increase** in the number of theme pubs had contributed to an increase in visitation to hotels and clubs. A further 24% reported extended trading hours of venues had increased their visitation (see Figure 7.2A).

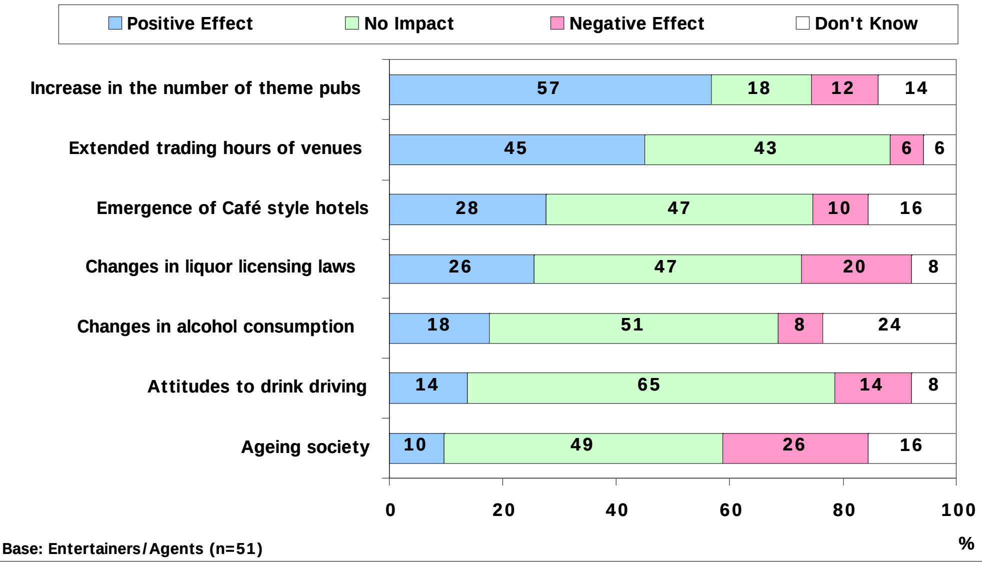
The main aspect associated with a **decrease** in **non-gaming** patron visitation to hotels and clubs is personal lifestyle changes (35%). About 2 in 10 non-gaming patrons reported the introduction of EGMs into Victoria has contributed to a decrease in visitation. A similar proportion reported that attitudes to drink driving also contributed to a decrease in visitation.

As illustrated in Figure 7.2B, 34% of **gaming** patrons reported that the introduction of EGMs into Victoria had contributed to an **increase** in their visitation to hotels and clubs. Approximately 22% of gaming patrons reported that personal lifestyle changes had increased their visitation, although a similar proportion indicated it had contributed to a decline in visitation.

External Impacts: Entertainers/Agents

7.3A IMPACT ON OPPORTUNITIES FOR LIVE ENTERTAINERS

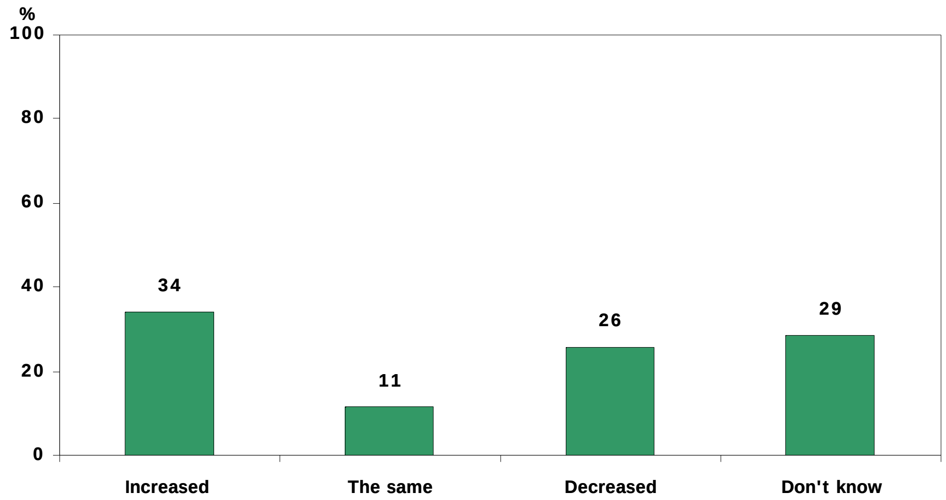
"Do you think any of the following have had an impact on opportunities for live entertainers at hotels or clubs?"



Base: Entertainers/Agents (n=51)

7.3B OPPORTUNITIES FOR ENTERTAINERS AT CAFES & RESTAURANTS

"Opportunities for live entertainers at cafes and restaurants in the last 12 months has...?



Base: Entertainers/Agents (n=51)

7.3 Impact on Opportunities for Live Entertainers

Entertainers and agents were asked to specify whether any of the following aspects have had an impact, either positive or negative, on opportunities for live entertainers as hotels and clubs:

- ✓ Extended trading hours of venues;
- ✓ Attitudes to drink driving;
- ✓ Changes to restaurant liquor licensing;
- ✓ Increase in the number of theme pubs;
- ✓ Emergence of café style hotels;
- ✓ Ageing society; and
- ✓ Changes in alcohol consumption patterns.

As illustrated in Figure 7.3A, the main aspects reported to have had a **positive** impact on opportunities for live entertainers at hotels and clubs include an increase in the number of **theme pubs** (57%) and **extended trading hours** of venues (45%).

The aspect most associated with a **decline** in opportunities for live entertainers at hotels and clubs is the **ageing** of society (26%).

Approximately 26% of entertainers and agents reported changes in liquor licensing laws, which allow restaurants and café to serve alcohol without serving food, have increased opportunities for live entertainers at hotels and clubs. However, 20% reported that the changes in liquor licensing laws have created a decline in opportunities at hotel and clubs.

A third of entertainers and agents reported that opportunities for live entertainer at restaurants and cafes has increased in the last 12 months, although 26% report a decline in opportunities (see Figure 7.3B).

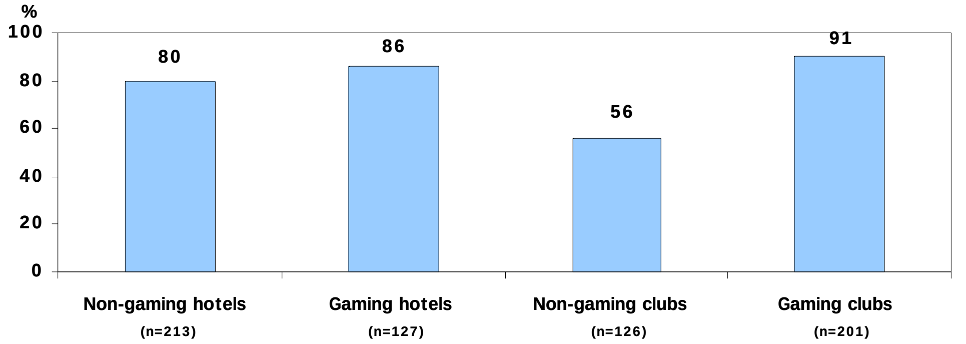
SECTION 8.0

Contributions to the Community

Contributions from Venues

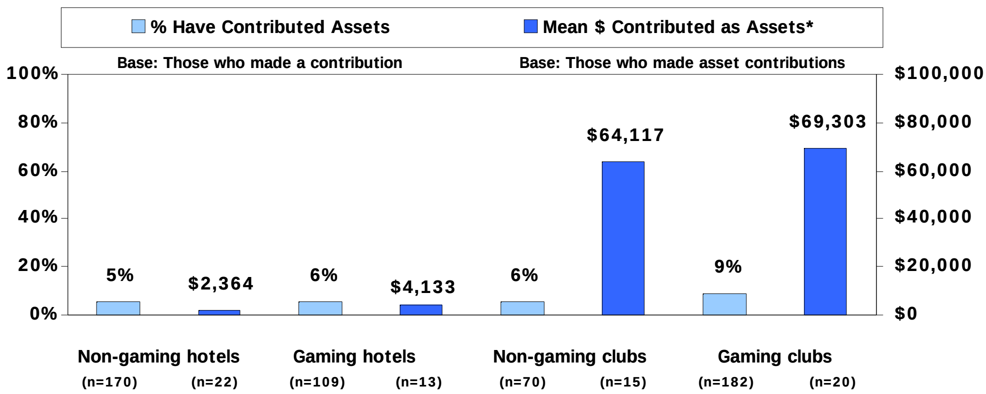
8.1A MADE CONTRIBUTIONS

"Did you make any contributions to the community in the period 1 January 1998 to 31 December 1998?"

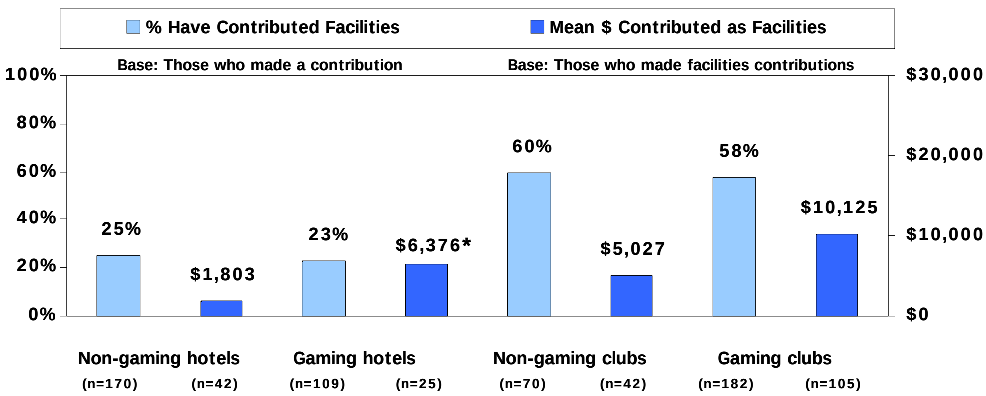


Base: All respondents answering

8.1B ASSETS CONTRIBUTED



8.1C FACILITIES CONTRIBUTED



*Caution: Small sample sizes

8.0 CONTRIBUTIONS TO THE COMMUNITY

Both gaming and non-gaming venues make substantial contributions to their local community. There are indications that an increase in the revenue from EGMs has allowed gaming venues, particularly gaming clubs, to pay substantially higher dollar value donations than non-gaming venues.

8.1 Contributions from Venues

Venues were asked to provide information on contributions made to the community in 1998 with details separated by the following categories:

- Assets – the physical transfer of ownership;
- Facilities – free or subsidised used of venue facilities or resources including staff time and discounts;
- Donations – money or gifts;
- Sponsorship – money or gifts in exchange for publicity; and
- Other support – other benefits or contributions.

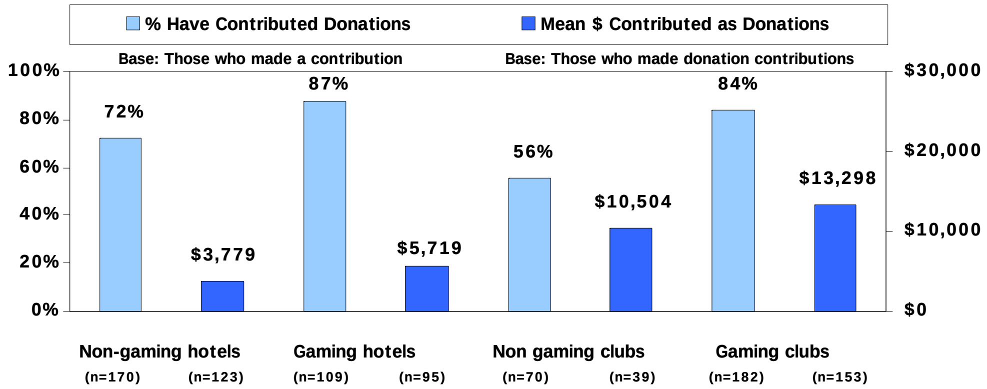
Approximately 86% of gaming hotels and 91% of gaming clubs reported making some sort of contribution to the community in 1998. In comparison, 80% of non-gaming hotels and 56% of non-gaming clubs reported making contributions in 1998 (see Figure 8.1A).

The transfer of **assets** are the least likely type of contribution to be made by venues. As illustrated by Figure 8.1B, gaming clubs are more likely than other venue types to make asset contributions. Despite small sample sizes, it is clear that the value of assets contributed by clubs is significantly higher than assets contributions made by hotels.

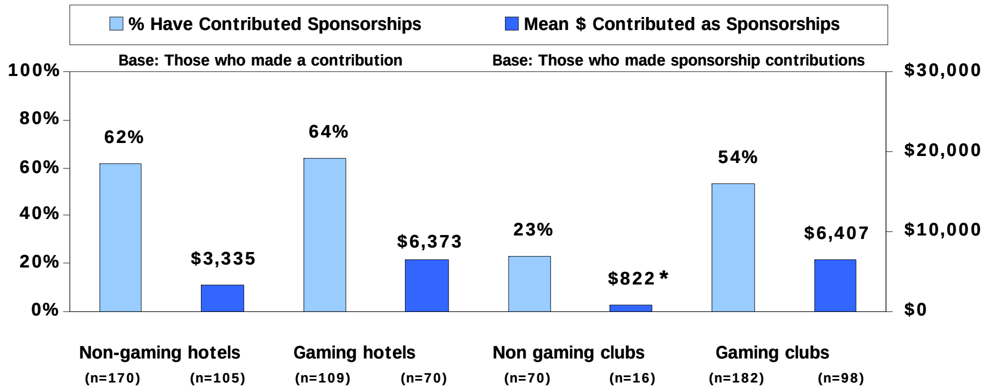
As illustrated in Figure 8.1C, clubs are more likely than hotels to provide contributions in the form of free or subsidised use of **facilities**. Of those making contributions in 1998, 60% of non-gaming clubs and 58% of gaming clubs reported making contributions in the form of facilities. On average gaming clubs contribute more in dollar value terms than non-gaming clubs ($10k and $5k respectively) . In comparison only 23% of gaming hotels and 25% of non-gaming hotels made facility contributions, with an average value of $6k and $1.8k respectively.

Contributions from Venues

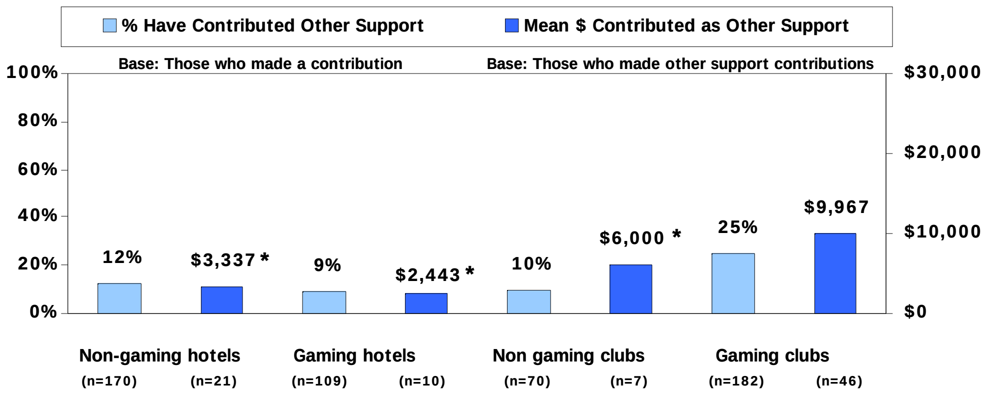
8.1D DONATIONS CONTRIBUTED



8.1E SPONSORSHIPS CONTRIBUTED



8.1F OTHER SUPPORT CONTRIBUTED



*Caution: Small sample sizes

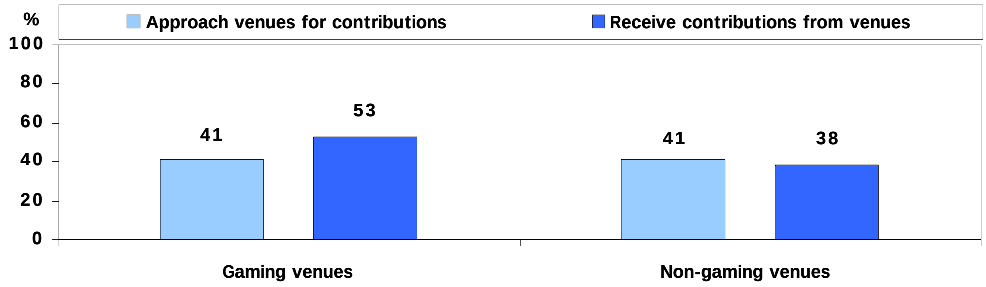
Donations are the most common type of contribution made by hotels and clubs. Figure 8.1D reveals that gaming venues are more likely than non-gaming venues to give donations. Approximately 87% of gaming hotels and 84% of gaming clubs have given donations compared with 72% of non-gaming hotels and 56% of non-gaming clubs. Once again, the average dollar value of donations made by gaming clubs ($13K) is higher than for other venues.

Hotels are more likely than clubs to give **sponsorship** to community groups. Of those who have made contributions, 62% of non-gaming hotels and 64% of gaming hotels report giving sponsorships, with an average dollar value of $3.3k and $6.3k respectively. Not surprisingly, the majority of hotels giving sponsorships reported the opportunity to increase interest and patronage in the venue as the main reason. In comparison, 54% of gaming clubs and 23% of non-gaming clubs reported giving sponsorships, with an average dollar value much lower than that reported by hotels (see Figure 8.1E).

Beneficiaries Perceptions

8.2A APPROACHING VENUES FOR CONTRIBUTIONS & RECEIVING CONTRIBUTIONS FROM VENUES

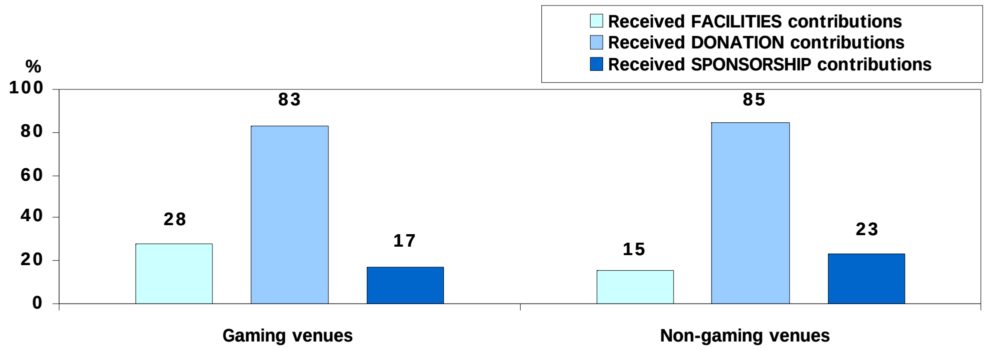
"To your knowledge, does your organisation approach gaming/non-gaming venues for contributions?"
"Has your organisation received direct financial or other contributions from gaming/non-gaming venues in the last 12 months?"



Base: All respondents (n=34)

8.2B TYPES OF CONTRIBUTIONS RECEIVED*

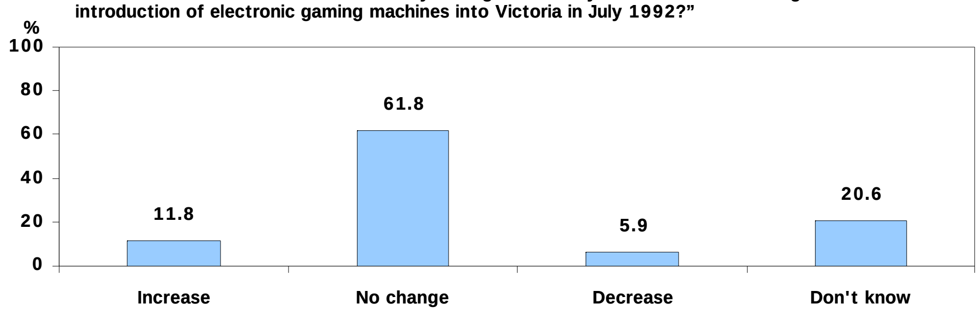
"Which of the following types of contributions did you receive from gaming/non-gaming venues?"



Base: Those who received contributions from gaming/non-gaming venues (n=27)

8.2C CHANGES TO THE LEVEL OF CONTRIBUTIONS FROM VENUES SINCE INTRODUCTION OF EGMs

"Has the level of contributions made to your organisation by hotels and clubs changed since the introduction of electronic gaming machines into Victoria in July 1992?"



Base: All respondents (n=34)

*Caution: Small sample sizes

8.2 Beneficiaries Perceptions of Contributions

Beneficiaries are just as likely to approach gaming venues as they are to approach non-gaming venues. Approximately 41% of beneficiaries reported approaching hotels and clubs for contributions.

The main reason stated for **not** approaching **gaming** venues was that they do not approach any organisations or they had not thought of gaming venues as a source of contributions. Although a small number of venues, particularly health and welfare organisations, did have a moral issue with approaching gaming venues for contributions. These beneficiaries were also concerned about the image it would portray to the general public if they were seen to be approaching gaming venues, with some organisations having a formal policy not to approach gaming venues. Some venues reported the reason for not approaching non-gaming venues was the moral issue of approaching an organisation that sells alcohol.

A higher proportion recalled receiving contributions from gaming venues (53%) than from non-gaming venues (38%). Some venues did not recall receiving contributions from hotels and clubs (see Figure 8.2A).

Beneficiaries were most likely to have recalled receiving donations, followed by facilities and sponsorships (see Figure 8.2B). Donations received by beneficiaries from hotels and clubs include cash, bar and meal vouchers or gifts. Facilities received from both gaming and non-gaming venues mostly include the free use of function rooms. One organisation reported to have received from a gaming venue, free accommodation for volunteers.

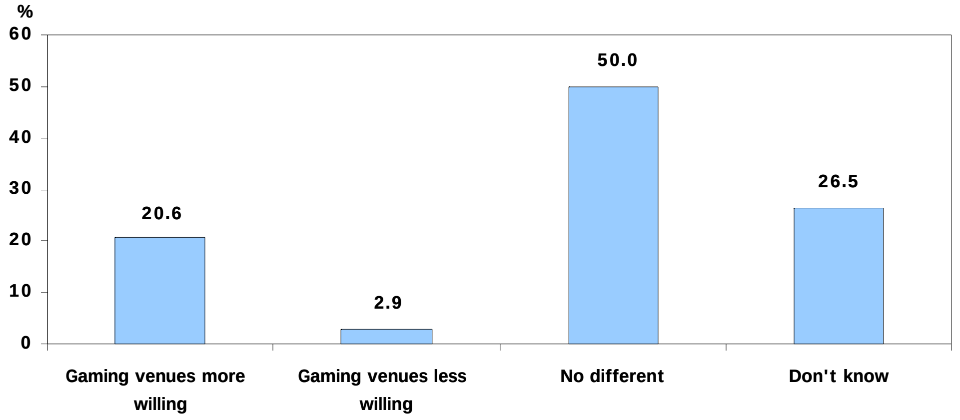
When asked if there had been a change in the **level** of contributions received by hotels and clubs since the introduction of EGMs into Victoria, the majority of beneficiaries indicated there had been **no change**. Although 12% reported an increase and 6% reported a decline (see Figure 8.2C).

The beneficiaries who reported an increase in the level of contributions, all associated this increase with additional contributions received from gaming venues as a result of increased revenue from EGMs.

Beneficiaries Perceptions

8.2D WILLINGNESS TO CONTRIBUTE

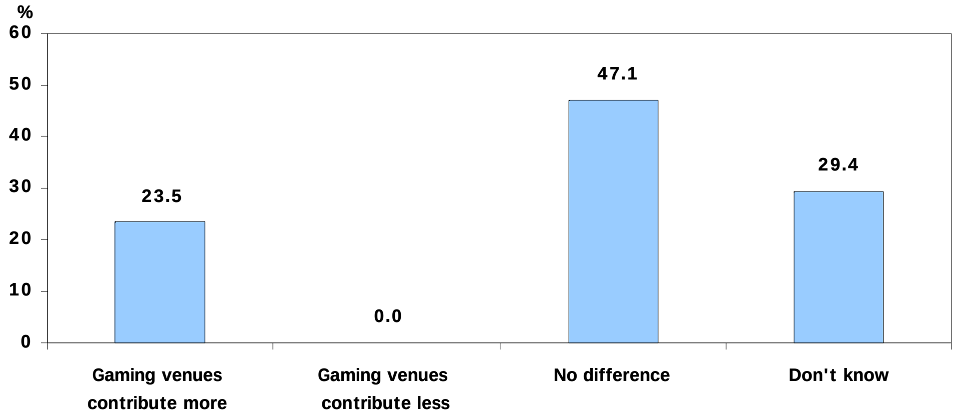
"How do gaming venues compare to non-gaming venues in their willingness to make contributions?"



Base: All respondents (n=34)

8.2E LEVEL OF CONTRIBUTION

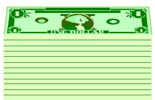
"How do gaming venues compare to non-gaming venues in their level of contributions?"



Base: All respondents (n=34)

Beneficiaries were asked how gaming venues compare to non-gaming venues in their willingness to contribute. Although 50% of beneficiaries perceive there to be no difference, 21% reported gaming venues to be more willing to make contributions. Only 3% perceive gaming venues to be less willing than non-gaming venues to make contributions (see Figure 8.2D).

Consistent with perceptions of willingness, 47% of beneficiaries perceive gaming venues to not differ from non-gaming venues in the level of contributions made. Although 24% of beneficiaries report that gaming venues contribute more than non-gaming venues (see Figure 8.2E).



SECTION 9.0

Community Benefits Through Government Taxation

9.0 COMMUNITY BENEFITS THROUGH GOVERNMENT TAXATION

In addition to voluntary contributions to the community as discussed in the previous section, community benefits are also received through government taxation, particularly via the **Community Support Fund**.

9.1 State Government Revenue from Gambling Taxes

In the 1999-2000 Victorian State Budget, estimated gambling taxes made up approximately 16% of the State Government's revenue from taxes and charges. Table 9.1.1 indicates the relationship of gambling taxation to total Government revenue in the periods 1991-1992 to 1999-2000.

Table 9.1.1 Gambling Revenue as a Proportion of Total Revenue 1991-2000

	1991-1992[1]	1992-1993[1]	1993-1994[1]	1994-1995[1]	1995-1996[1]	1996-1997[2]	1997-1998[2]	1998-1999[3]	1999-2000[3]
Total Gambling Revenue, $m..............	513.2	600.3	760.8	907.7	1051.3	1157.0	1296.0	1395.9	1428.2
Total Taxes, Fees and Fines $m....................	5777.7	6302.0	7184.1	7533.8	8398.5	NA[4]	NA[4]	8842.9	8937.6
Total Revenue and Grants (excluding Privitisations) $m........	11735.9	12364.9	13645.6	14143.7	14941.0	NA[4]	NA[4]	19655.0	19489.6
Gambling revenue as % of Total Taxes, Fees and Fines....................	8.88	9.53	10.59	12.05	12.52	NA[4]	NA[4]	15.79	15.98
Gambling Revenue as % of Total Revenue and Grants..................	4.37	4.85	5.58	6.42	7.04	NA[4]	NA[4]	7.10	7.33

Notes: [1] Exact figures from Victorian Budget Papers 1991-92 to 1996-97
[2] Exact figures from Taxation Revenue 1997-98 ABS Cat no 5506.0
[3] Estimates from Victorian Budget Papers 1999-2000
[4] NA: Comparable figures not available because of changes to accounting and reporting procedures

Table 9.1.2 below details the amount of direct taxation revenue received from each gambling activity during the period 1991-92 to 1999-2000. It clearly illustrates the changing balance of gambling revenue over that period. Table 9.1.3 gives the percentage breakdown of these figures.

Table 9.1.2 Direct State Government Taxation - Gambling Industry ($ million) - 1991-2000

Gambling Product	1991-1992[1] $m	1992-1993[1] $m	1993-1994[1] $m	1994-1995[1] $m	1995-1996[1] $m	1996-1997[2] $m	1997-1998[2] $m	1998-1999[3] $m	1999-2000[3] $m
Electronic Gaming Machines..................	0.2	94.9	258.8	384.0	509.1	626	704	806.1	843.0
Casino	0.0	0.0	0.0	67.8	110.4	128	175	156.1	145.0
Racing	191.6	198.4	201.7	144.1	122.0	121	127	135.3	139.0
Lotteries	300.2	290.2	286.1	296.6	297.9	277	286	294.7	296.3
Other – including Bingo, Raffles	21.2	16.8	14.2	15.2	11.9	5	4	3.7	4.0
TOTAL.....................	**513.2**	**600.3**	**760.8**	**907.7**	**1051.3**	**1157**	**1296**	**1395.9**	**1428.2**

Notes: [1] Exact figures from Victorian Budget Papers 1991-92 to 1996-97
[2] Exact figures from Taxation Revenue 1997-98 ABS Cat no 5506.0
[3] Estimates from Victorian Budget Papers 1999-2000

Table 9.1.3 Percentage Distribution of Total Direct Gambling Taxes Collected 1991-2000

Gambling Product	1991-1992[1]	1992-1993[1]	1993-1994[1]	1994-1995[1]	1995-1996[1]	1996-1997[2]	1997-1998[2]	1998-1999[3]	1999-2000[3]
Electronic Gaming Machines..................	0.04	15.81	34.02	42.30	48.43	54.11	54.32	57.75	59.03
Casino	0.00	0.00	0.00	7.47	10.50	11.06	13.50	11.18	10.15
Racing	37.33	33.05	26.51	15.88	11.60	10.46	9.80	9.69	9.80
Lotteries	58.50	48.34	37.61	32.68	28.34	23.94	22.07	21.11	20.75
Other – including Bingo, Raffles	4.13	2.80	1.87	1.67	1.13	0.43	0.31	0.27	0.28
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Notes: [1] Exact figures from Victorian Budget Papers 1991-92 to 1996-97
[2] Exact figures from Taxation Revenue 1997-98 ABS Cat no 5506.0
[3] Estimates from Victorian Budget Papers 1999-2000

There has been significant growth in taxation from the newer forms of gambling (ie EGMs and the Casino) while taxation revenue from traditional gambling forms has declined.

More detail on how the various taxes for each gambling activity are derived is provided in Table 9.1.4.

The taxation figures for the casino include a Gross Gaming Fee plus a licence fee component relating to the increase in the number of tables awarded in October 1995. The original licence fee payable is not included in the table above as it was determined by Treasury to relate to the sale of an intangible asset rather than taxation.

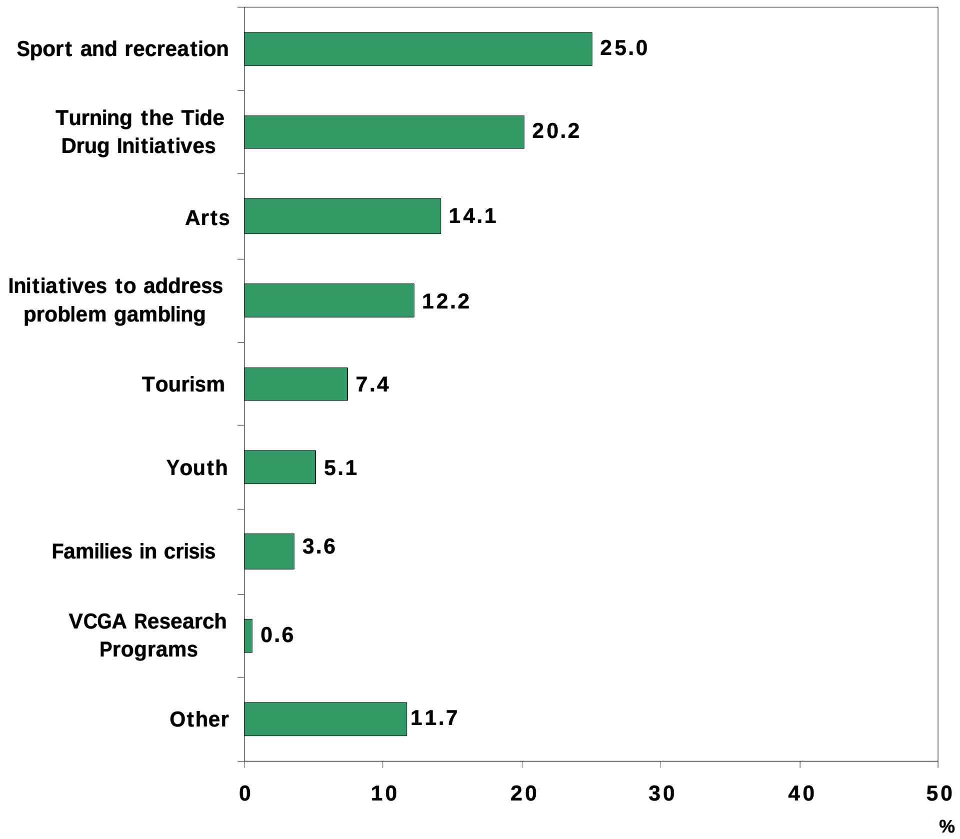
The figures corresponding to Electronic Gaming Machines in Tables 9.1.2 and 9.1.3 includes monies paid into both the Consolidated Fund and the Community Support Fund. The level of taxation noted for Electronic Gaming Machines includes an activity tax (payable by the gaming operators – Tattersalls and Tabcorp), an annual gaming licence fee payable by Tattersalls, a fee from the Spirit of Tasmania and sundry fees. When Tabcorp was privatised the fees payable to the government were not in the form of taxation, rather they were determined to be relating to the sale of an intangible asset and as such received a different classification.

Table 9.1.4 Tax Rates For The Various Legal Forms Of Gambling In Victoria

CATEGORY		RETURN TO PLAYER	TAX RATE
Lotteries	Lottery consultations	60% in the form of prizes	For the 1998-99 financial year the tax rate applicable was 35.55% of subscriptions. This replaced the staggered taxation arrangements of: · 35% on first $200 million of subscriptions · 35.5% on next $400 million of subscriptions · 36% on all subscriptions above $600 million As at 1 July 1999, the tax rate is 36% for each consultation (ie lottery)
	Soccer Pools	50% in the form of prizes	34% of subscriptions
Racing	Tabcorp	Not less than 80% of the amount invested from any one totalisator An average of not less than 84% of investments on all totalisators in any financial year	28.2% of the amount of commissions 28.2% of fractions
	Bookmaker	As per agreed bets at fixed odds	2.0% of turnover at metropolitan racecourses 1.5% at other racecourses within Victoria
EGMs		Minimum of 87% of turnover returned to players	Clubs- 33.33% of gross profit (net cash balance) Hotels – 41.67% of gross profit (net cash balance) includes contribution of 8.33% to the Community Support Fund Note: Gaming Operators are charged a supervision fee (defined as tax in legislation).
Casino		Minimum of 87% of EGM turnover returned to players Returns to players from casino table games determined by the rules of the games approved by the Authority	21.25% of gross gaming revenue (GGR -includes revenue from Casino EGMs and table games). Super Tax – 1% for each $20m of GGR above $556.3m (up to maximum total of 41.25% of GGR of $936.3m) Commission Based Players (CBP) at 9% of GGR plus super tax on GGR above $178m at the rate of 1% for each $20m up to a maximum total of 21.25% on CBP GGR of $600m A further 1% of GGR is paid as Community Benefit Levy 5 Annual payments to Tourism Victoria of $1m each. Final payment due 1 July 1999.
Other	Club Keno	82.5% of subscription returned to players	33.3% of weekly gaming revenue
	Sportsbook	As per agreed bets at fixed odds	20% of net investment (amount invested less amount paid out as winnings)

Community Support Fund Projects By Payment Type

9.2 ANNOUNCED PROJECTS AS AT 30 JUNE 1999



9.2 Community Support Fund

The Community Support Fund was established under the Gaming Machine Control Act 1991. The act allows for the direction of a portion of government revenue from gaming machines in hotels to programs and projects which will benefit the Victorian community. The fund is derived from one twelfth (1/12) of the net cash balance from hotel gaming (approximately 1% of turnover).

It is important to note that the Community Support Fund only derives revenue from gaming hotels and not gaming clubs on the assumption that as non-profit organisations clubs will automatically put their additional revenue back into facilities for members.

To date Community Support Fund projects to the value of $493,379,148 have been announced. Table 9.2.1 shows the breakdown of expenditure by project type.

Table 9.2.1 Community Support Fund Projects as at 30 June 1999

Project Type	Project Value ($)
Families in crisis	17,877,717
Programs that include initiatives to address problem gambling	60,382,719
Youth	25,331,360
Arts	69,595,452
Tourism	36,570,695
Sport and Recreation	123,165,206
Turning the tide drug initiatives	99,820,677
VCGA Research Programs	3,008,305
Other	57,627,017
TOTAL	**$493,379,148**

As illustrated by Figure 9.2 over a quarter of funds have been used for sport and recreation projects. Specific sport and recreation projects funded by the Community Support Fund include:

- Melbourne Sports and Aquatic Centre – construction and fitout of centre ($55,500,000);
- Better Pools – Aquatic Facility Funding Program ($20,000,000);
- V.I.S Athlete Program – scholarships and development program for Victorian athletes ($2,680,000); and
- Redevelopment of the hockey and netball facilities at Royal Park ($27,000,000).

Approximately 20% of funds were used for drug initiatives followed by 14% for the arts. The research program of the Authority, of which this project is part, is also funded by the Community Support Fund.

Appendix 6 provides further details of individual projects funded through the Community Support Fund.

APPENDIX 1

Venue Survey Questionnaires

Market Solutions

Market Research Consultants
Norwood House, 17 Norwood Crescent
Moonee Ponds, Vic., 3039
Ph: (03) 9372 8400 Fax: (03) 9372 8411

VICTORIAN CASINO & GAMING AUTHORITY
HOTEL AND CLUB GAMING IMPACT STUDY 1999

(Ref: 0654)

HOTEL SURVEY
Gaming Hotels

SECTION 1: VENUE DESCRIPTION

Q.1A How many **electronic gaming machines** do you currently have?

WRITE IN NO. OF GAMING MACHINES .... ______

Q.1B Please indicate the category which most accurately describes your venue.
Circle one number

Traditional hotel/tavern: with bar, meals, packaged liquor sales, possible entertainment - no accommodation	1
Traditional hotel/tavern: (as above) - with limited accommodation up to 10 rooms	2
Traditional hotel/tavern: (as above) - with significant accommodation - more than 10 rooms	3
Part of a large multi-national chain - large accommodation division, several bars and eating areas, possibly also entertainment	4
Nightclub - no accommodation, focus on entertainment	5
Other hotel (Specify)	6

Q.1C Which of the following BEST describes the atmosphere or theme of this venue?

Traditional pub	1
Café style hotel	2
Irish theme pub	3
Sports bar	4
Comedy club	5
Theatre restaurant	6
Cabaret	7
Gaming theme	8
Other theme (Specify)	9

Q.1D What is the MAIN business focus for this venue? *Circle one number only.*

Gaming	1
Bar sales	2
Dining	3
Entertainment	4
Accommodation	5
Other focus (Specify)	6

SECTION 2: TRADING EXPERIENCE & EXPECTATIONS

Q.2A How did your trading position at June 1998 compare with June 1997?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

CATI: What are the main reasons for your trading position being …?

Q.2B And compared to your current position, in the next financial year 1999/2000, do you expect your trading position (turnover) to be…?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

CATI: What are the main reasons for saying your future trading position will be …?

Q.2C What changes, if any, to the overall **patronage** at your venue were experienced in 1998 compared to 1997?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

CATI: What has been the main reasons for your patronage being…?

SECTION 3 – VENUE EXPENDITURE ON BUILDINGS & FACILITIES

Actual Expenditure
1997 & 1998

Q.3A In 1997 or 1998 were there any improvements to buildings or facilities at your venue **completed** or **commenced** *(but not completed)*?

Yes *(Go to Q.3B)*........ 1

No *(Go to Q.3C)*......... 2

Q.3B Please complete the tables below and indicate in the last column whether or not this improvement was attributable to the installation of gaming machines.

New building projects – 1997 & 1998

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	**Total value of works**	**Commence ment year (1997 or 1998)**	**Completion year (1997, 1998 or beyond)**	**Attributable to installation of gaming machines?**	
Eg. Extension to dining area	*$150,000*	*1997*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1997 & 1998

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	**Total value of works**	**Commence ment year (1997 or 1998)**	**Completion year (1997, 1998 or beyond)**	**Attributable to installation of gaming machines?**	
Eg. Repainting of bar area	*$5,000*	*1997*	*1997*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Planned Expenditure
1999 & 2000

Q.3C Are there any improvements to buildings or facilities **planned** for your venue to be commenced in 1999 or 2000?

Yes *(Go to Q.3D)*........ 1

No *(Go to Q.4A)* 2

Q.3D Please complete the tables below and indicate in the last column whether or not these improvements are attributable to the installation of gaming machines.

New building projects – 1999 & 2000

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	Attributable to installation of gaming machines?	
Eg. Extension to dining area	*$150,000*	*1999*	*2000*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1999 & 2000

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	Attributable to installation of gaming machines?	
Eg. Repainting of bar area	*$5,000*	*1999*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

SECTION 4: TRADING POSITION & EMPLOYMENT

Q.4A Now we'd like more detail about your trading experiences. Please complete the following table about your venue's **income**. Under Column A please write in the gross income in an **average week** for the six month periods during 1998. Under Column B, please write in the **total annual** gross income for your venue in the financial years 1996/1997 and 1997/1998.

Estimates are acceptable where actual figures are not available.

	A		B	
	Average gross income per week		**Total annual gross income**	
Trade area	1 January 1998 to 30 June 1998	1 July 1998 to 31 December 1998	1 July 1996 to 30 June 1997	1 July 1997 to 30 June 1998
Gaming*				
Bar trade				
Meals trade				
Entertainment...............				
Accommodation				
Conferences.................				
All other income				

***Note:* Gross income refers to the venue's income from gaming (i.e. excluding the proportions that are owed to the government and gaming operators, but prior to any expenses being met).**

Q.4B Now we'd like some **employment** details. Please write in the **total hours** worked in the **week ending** on the date shown under each column. *Estimates are acceptable where actual figures are not available.*

Total hours worked (including overtime)…

	By full time staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment...............				
Gaming				
Accommodation				
Conferences.................				
Administration				
Other				

	By part time/casual staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment...............				
Gaming				
Accommodation				
Conferences.................				
Administration				
Other				

Note: Some questions, particularly Q.4A and Q.4B, were asked to collect data for another of the Authority's 98-99 research projects 'The Economic Impact of Gaming' and the results are therefore not reported in this report.

SECTION 5 – EFFECT OF GAMING ON VENUES

Q.5A Please circle a number under Column A to show how your current trading position compares with that prior to becoming an operational gaming venue (i.e. has your gross income increased or decreased)? And then in Column B, write in the percentage change if it has increased or decreased.

	A Please indicate if there has been an increase or decrease in gross income since becoming an operational gaming venue			**B** Estimate the percentage change in gross income for each trade area
Trade Area	Increase	Same	Decrease	% Change
Bar trade	1	2	3	
Meals trade	1	2	3	
Entertainment......................	1	2	3	
Accommodation	1	2	3	
Conferences........................	1	2	3	
All other income	1	2	3	
TOTAL	1	2	3	

Q.5B Please indicate in the table below to what extent your venue **subsidises** any of the following trade areas:

	Please indicate extent of subsidy		
Trade Area	Not subsidised	Small subsidy	Large subsidy
Bar trade.............................	1	2	3
Meals trade..........................	1	2	3
Entertainment	1	2	3

Q.5C What are your total opening hours per week? WRITE IN TOTAL OPENING HRS PER WEEK.... ______

Q.5D On any day are you open 24 hours?

Yes 1

No.............................. 2

Q.5E Have you made changes to your hours of operation since becoming an operational gaming venue?

Yes - Increased 1

Yes – Decreased 2

No change 3

If **increased** or **decreased**, by how many hours per week have you changed your opening hours?

WRITE IN HOURS PER WEEK INCREASED/DECREASED........... ______

Q.5F Have you noticed a change in the type of people coming to your venue since becoming an operational gaming venue?

Yes 1

No.............................. 2

If **yes**, please provide a short description of these changes.

....

....

....

....

SECTION 5 – EFFECT OF GAMING ON VENUES cont…

Q.5G Since becoming an operational gaming venue, what type of new groups or target markets have you attempted to attract to your venue? Please indicate if these endeavours were successful.

	Type of new group or target market	*Was this endeavour successful?* Yes	No
a)		1	2
b)		1	2
c)		1	2
d)		1	2

Q.5H And, since becoming an operational gaming venue do you think there has been an improvement or a decline in these aspects at **your establishment** …

		Improvement in opportunities	No change	**Decline** in opportunities	(Don't know/ not applicable)
a)	Dining opportunities....................	1	2	3	4
b)	Entertainment opportunities (excluding EGMs)	1	2	3	4
c)	Quality of the internal facilities.....	1	2	3	4
d)	Accommodation at your venue....	1	2	3	4
e)	Conference facilities at your venue	1	2	3	4

CATI: What in particular about the… has improved/declined?
(For each aspect in Q5H)

SECTION 6 – LIVE ENTERTAINMENT

Q.6A Does your venue have **live** entertainment?

Yes	1
No (*Go to Section 7*)	2

Q.6B What type of live entertainment does your venue provide? *(Circle as many as applicable)*

Cover Bands	1
Original Bands	2
Solo acts	3
Duo acts	4
Cabaret	5
Comedians	6
Children's entertainers	7
Other live entertainment *(Specify)*	8

Q.6C How many times a week do you have live entertainment?

WRITE IN NO. TIMES PER WEEK .... ______

Q.6D At **your venue**, has there been an increase or decrease in opportunities for entertainers since becoming an operational gaming venue?

Increase	1
The same	2
Decrease	3
(Don't know)	4

Q.6E If **increased** or **decreased**: What would you say are the main contributors to this increase or decrease?

....
....
....
....
....
....

SECTION 7 – EXTERNAL IMPACT ON VENUES

Q.7 Do you think any of the following factors have had, or will have, an affect on your business:

	Positive Impact	Negative Impact	No Impact	Don't Know
a) Theme pubs *(Irish pubs etc.)*	1	2	3	4
b) Extended trading hours at **your** venue	1	2	3	4
c) Extended trading hours at **other** venues	1	2	3	4
d) Changes in alcohol consumption patterns	1	2	3	4
e) Changes in attitudes to drink driving	1	2	3	4
f) Ageing society	1	2	3	4
g) Changes in liquor licensing laws (*can now serve alcohol at restaurants/cafes without food)*	1	2	3	4
h) Emergence of Café style hotels	1	2	3	4
i) Competition from gaming venues	1	2	3	4
j) General economic condition	1	2	3	4
k) Changes in leisure patterns and preferences	1	2	3	4
l) Development of the area as a tourist destination	1	2	3	4

PLEASE TURN OVER

SECTION 8 – CONTRIBUTIONS TO THE COMMUNITY

Q.8 Did you make any contributions to the community in the period 1 January 1998 to 31 December 1998?

Yes 1

No.............................. 2

If **YES**, please complete the following table in detail specifying type, location and value of the contributions made in 1998.

TYPE OF CONTRIBUTION MADE IN 1998	ORGANISATION TYPE RECEIVING CONTRIBUTION	$ DOLLAR VALUE	MAIN REASON FOR MAKING CONTRIBUTION (Please circle one main reason only)					
			Contin-uation of past practice	Relation-ship to the operation of the venue	Opportun-ity to increase interest and patronage	Personal involve-ments & associa-tions of the operator/ manager	Desire to make a positive contribu-tion to the commun-ity	Other
Example: Provision of Gymnasium Equipment	*Football Club*	*$5,000*						
ASSETS (physical transfer of ownership)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
FACILITIES (free/ subsided use of facilities or resources including staff time and discounts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
DONATIONS (money or gifts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
d)			1	2	3	4	5	6
SPONSORSHIP (money or gifts in exchange for publicity)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
OTHER SUPPORT (other benefits)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6

TOTAL AMOUNT CONTRIBUTED	$

Market Solutions

Market Research Consultants
Norwood House, 17 Norwood Crescent
Moonee Ponds, Vic., 3039
Ph: (03) 9372 8400 Fax: (03) 9372 8411

VICTORIAN CASINO & GAMING AUTHORITY
HOTEL AND CLUB GAMING IMPACT STUDY 1999

(Ref: 0654)

CLUB SURVEY
Gaming Clubs

SECTION 1: VENUE DESCRIPTION

Q.1A How many **electronic gaming machines** do you currently have?

WRITE IN NO. OF GAMING MACHINES .... ______

Q.1B Please indicate the category which most accurately describes your venue.
Circle one number

Sports club	1
RSL club..	2
Community or social club	3
Other club (Specify)	4

Q.1C Please indicate the number of members you currently have…

WRITE IN NUMBER OF **FULL** MEMBERS

____

WRITE IN NUMBER OF **GAMING** MEMBERS

____

WRITE IN NUMBER OF **OTHER** MEMBERS

____

SECTION 2: TRADING EXPERIENCE & EXPECTATIONS

Q.2A How did your trading position at June 1998 compare with June 1997?

CATI: What are the main reasons for your trading position being …?

Significantly better.................	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

Q.2B And compared to your current position, in the next financial year 1999/2000, do you expect your trading position (turnover) to be…?

CATI: What are the main reasons for saying your future trading position will be …?

Significantly better.................	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

Q.2C What changes, if any, to the overall **patronage** at your venue were experienced in 1998 compared to 1997?

CATI: What has been the main reasons for your patronage being…?

Significantly better.................	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

SECTION 3 – VENUE EXPENDITURE ON BUILDINGS & FACILITIES

Actual Expenditure
1997 & 1998

Q.3A In 1997 or 1998 were there any improvements to buildings or facilities at your venue **completed** or **commenced** *(but not completed)*?

Yes *(Go to Q.3B)*........ 1

No *(Go to Q.3C)*......... 2

Q.3B Please complete the tables below and indicate in the last column whether or not this improvement was attributable to the installation of gaming machines.

New building projects – 1997 & 1998

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1997 or 1998)	Completion year (1997, 1998 or beyond)	Attributable to installation of gaming machines?	
Eg. Extension to dining area	*$150,000*	*1997*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1997 & 1998

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1997 or 1998)	Completion year (1997, 1998 or beyond)	Attributable to installation of gaming machines?	
Eg. Repainting of bar area	*$5,000*	*1997*	*1997*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

SECTION 3 – VENUE EXPENDITURE ON BUILDINGS & FACILITIES cont…

Planned Expenditure
1999 & 2000

Q.3C Are there any improvements to buildings or facilities **planned** for your venue to be commenced in 1999 or 2000?

Yes *(Go to Q.3D)*........ 1

No *(Go to Q.4A)* 2

Q.3D Please complete the tables below and indicate in the last column whether or not these improvements are attributable to the installation of gaming machines.

New building projects – 1999 & 2000

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	Attributable to installation of gaming machines?	
Eg. Extension to dining area	*$150,000*	*1999*	*2000*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1999 & 2000

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	Attributable to installation of gaming machines?	
Eg. Repainting of bar area	*$5,000*	*1999*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

SECTION 4: TRADING POSITION & EMPLOYMENT

Q.4A Now we'd like more detail about your trading experiences. Please complete the following table about your venue's **income**. Under Column A please write in the gross income in an **average week** for the six month periods during 1998. Under Column B, please write in the **total annual** gross income for your venue in the financial years 1996/1997 and 1997/1998.

Estimates are acceptable where actual figures are not available.

	A		**B**	
	Average gross income per week		**Total annual gross income**	
Trade area	1 January 1998 to 30 June 1998	1 July 1998 to 31 December 1998	1 July 1996 to 30 June 1997	1 July 1997 to 30 June 1998
Gaming*				
Bar trade				
Meals trade				
Entertainment................				
Accommodation				
Conferences..................				
All other income				

***Note:* Gross income refers to the venue's income from gaming (i.e. excluding the proportions that are owed to the government and gaming operators, but prior to any expenses being met).**

Q.4B Now we'd like some **employment** details. Please write in the **total hours** worked in the **week ending** on the date shown under each column. *Estimates are acceptable where actual figures are not available.*

Total hours worked (including overtime)…

	By full time staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment................				
Gaming				
Accommodation				
Conferences..................				
Administration				
Other.............................				

	By part time/casual staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment................				
Gaming				
Accommodation				
Conferences..................				
Administration				
Other.............................				

Note: Some questions, particularly Q.4A and Q.4B, were asked to collect data for another of the Authority's 98-99 research projects 'The Economic Impact of Gaming' and the results are therefore not reported in this report.

SECTION 5 – EFFECT OF GAMING ON VENUES

Q.5A Please circle a number under Column A to show how your current trading position compares with that prior to becoming an operational gaming venue (i.e. has your gross income increased or decreased)? And then in Column B, write in the percentage change if it has increased or decreased.

	A Please indicate if there has been an increase or decrease in gross income since becoming an operational gaming venue			B Estimate the percentage change in gross income for each trade area
Trade Area	Increase	Same	Decrease	% Change
Bar trade	1	2	3	
Meals trade	1	2	3	
Entertainment......................	1	2	3	
Accommodation	1	2	3	
Conferences........................	1	2	3	
All other income	1	2	3	
TOTAL	1	2	3	

Q.5B Please indicate in the table below to what extent your venue **subsidises** any of the following trade areas:

	Please indicate extent of subsidy		
Trade Area	Not subsidised	Small subsidy	Large subsidy
Bar trade..............................	1	2	3
Meals trade..........................	1	2	3
Entertainment	1	2	3

Q.5C What are your total opening hours per week? WRITE IN TOTAL OPENING HRS PER WEEK.... ______

Q.5D On any day are you open 24 hours?

Yes 1

No.............................. 2

Q.5E Have you made changes to your hours of operation since becoming an operational gaming venue?

Yes - Increased 1

Yes – Decreased 2

No change 3

If **increased** or **decreased**, by how many hours per week have you changed your opening hours?

WRITE IN HOURS PER WEEK INCREASED/DECREASED........... ______

Q.5F Have you noticed a change in the type of people coming to your venue since becoming an operational gaming venue?

Yes 1

No.............................. 2

If **yes**, please provide a short description of these changes.

....

....

....

....

SECTION 5 – EFFECT OF GAMING ON VENUES cont…

Q.5G Since becoming an operational gaming venue, what type of new groups or target markets have you attempted to attract to your venue? Please indicate if these endeavours were successful.

	Type of new group or target market	*Was this endeavour successful?* Yes	No
a)		1	2
b)		1	2
c)		1	2
d)		1	2

Q.5H And, since becoming an operational gaming venue do you think there has been an improvement or a decline in these aspects at **your establishment** …

		Improvement in opportunities	No change	**Decline** in opportunities	(Don't know/ not applicable)
a)	Dining opportunities....................	1	2	3	4
b)	Entertainment opportunities (excluding EGMs)	1	2	3	4
c)	Quality of the internal facilities.....	1	2	3	4
d)	Accommodation at your venue....	1	2	3	4
e)	Conference facilities at your venue	1	2	3	4

CATI: Has there been an improvement or a decline in the quality of sporting facilities at your venue?

Has there been an improvement or a decline in the Social elements of this club?

What in particular about the … has improved/declined?
(For each of the aspects in Q5H)

SECTION 6 – LIVE ENTERTAINMENT

Q.6A Does your venue have **live** entertainment?

Yes	1
No (*Go to Section 7*).............	2

Q.6B What type of live entertainment does your venue provide? *(Circle as many as applicable)*

Cover Bands	1
Original Bands	2
Solo acts	3
Duo acts...	4
Cabaret	5
Comedians..	6
Children's entertainers	7
Other live entertainment *(Specify)*	
....	
....	
....	8

Q.6C How many times a week do you have live entertainment?

WRITE IN NO. TIMES PER WEEK.................. ______

Q.6D At **your venue**, has there been an increase or decrease in opportunities for entertainers since becoming an operational gaming venue?

Increase	1
The same.............................	2
Decrease	3
(Don't know).........................	4

Q.6E If **increased** or **decreased**: What would you say are the main contributors to this increase or decrease?

....

....

....

....

....

....

SECTION 7 – EXTERNAL IMPACT ON VENUES

Q.7 Do you think any of the following factors have had, or will have, an affect on your business:

	Positive Impact	Negative Impact	No Impact	Don't Know
a) Theme pubs *(Irish pubs etc.)*	1	2	3	4
b) Extended trading hours at **your** venue	1	2	3	4
c) Extended trading hours at **other** venues	1	2	3	4
d) Changes in alcohol consumption patterns ...	1	2	3	4
e) Changes in attitudes to drink driving	1	2	3	4
f) Ageing society	1	2	3	4
g) Changes in liquor licensing laws (*can now serve alcohol at restaurants/cafes without food)*	1	2	3	4
h) Emergence of Café style hotels	1	2	3	4
i) Competition from gaming venues	1	2	3	4
j) General economic condition	1	2	3	4
k) Changes in leisure patterns and preferences..	1	2	3	4
l) Development of the area as a tourist destination	1	2	3	4

PLEASE TURN OVER

SECTION 8 – CONTRIBUTIONS TO THE COMMUNITY

Q.8 Did you make any contributions to the community in the period 1 January 1998 to 31 December 1998?

Yes	1
No..............................	2

If **YES**, please complete the following table in detail specifying type, location and value of the contributions made in 1998.

TYPE OF CONTRIBUTION MADE IN 1998	ORGANISATION TYPE RECEIVING CONTRIBUTION	$ DOLLAR VALUE	MAIN REASON FOR MAKING CONTRIBUTION (Please circle one main reason only)					
			Contin-uation of past practice	Relation-ship to the operation of the venue	Opportun-ity to increase interest and patronage	Personal involve-ments & associa-tions of the operator/ manager	Desire to make a positive contribu-tion to the commun-ity	Other
Example: Provision of Gymnasium Equipment	*Football Club*	*$5,000*						
ASSETS (physical transfer of ownership)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
FACILITIES (free/ subsided use of facilities or resources including staff time and discounts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
DONATIONS (money or gifts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
d)			1	2	3	4	5	6
SPONSORSHIP (money or gifts in exchange for publicity)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
OTHER SUPPORT (other benefits)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6

TOTAL AMOUNT CONTRIBUTED	$

Market Solutions

Market Research Consultants
Norwood House, 17 Norwood Crescent
Moonee Ponds, Vic., 3039
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VICTORIAN CASINO & GAMING AUTHORITY
HOTEL AND CLUB GAMING IMPACT STUDY 1999

(Ref: 0654)

HOTEL SURVEY
Non-gaming Hotels

SECTION 1: VENUE DESCRIPTION

Q.1A Please indicate the category which most accurately describes your venue. *Circle one number*

Traditional hotel/tavern: with bar, meals, packaged liquor sales, possible entertainment - no accommodation	1
Traditional hotel/tavern: (as above) - with limited accommodation up to 10 rooms	2
Traditional hotel/tavern: (as above) - with significant accommodation - more than 10 rooms	3
Part of a large multi-national chain - large accommodation division, several bars and eating areas, possibly also entertainment	4
Nightclub - no accommodation, focus on entertainment	5
Other hotel (Specify)	6

Q.1B Which of the following BEST describes the atmosphere or theme of this venue?

Traditional pub	1
Café style hotel	2
Irish theme pub	3
Sports bar	4
Comedy club	5
Theatre restaurant	6
Cabaret	7
Other theme (Specify)	8

Q.1C What is the MAIN business focus for this venue? *Circle one number only.*

Bar sales	1
Dining	2
Entertainment	3
Accommodation	4
Other focus (Specify)	5

SECTION 2: TRADING EXPERIENCE & EXPECTATIONS

Q.2A How did your trading position at June 1998 compare with June 1997?

CATI: What are the main reasons for your trading position being …?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

Q.2B And compared to your current position, in the next financial year 1999/2000, do you expect your trading position (turnover) to be…?

CATI: What are the main reasons for saying your future trading position will be …?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

Q.2C What changes, if any, to the overall **patronage** at your venue were experienced in 1998 compared to 1997?

CATI: What has been the main reasons for your patronage being…?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

SECTION 3 – VENUE EXPENDITURE ON BUILDINGS & FACILITIES

Actual Expenditure
1997 & 1998

Q.3A In 1997 or 1998 were there any improvements to buildings or facilities at your venue **completed** or **commenced** *(but not completed)*?

Yes *(Go to Q.3B)*........ 1

No *(Go to Q.3C)* 2

Q.3B Please complete the tables below and indicate in the last column whether or not this improvement was in response to competition from gaming venues.

New building projects – 1997 & 1998

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1997 or 1998)	Completion year (1997, 1998 or beyond)	In response to competition from gaming venues?	
Eg. Extension to dining area	*$150,000*	*1997*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1997 & 1998

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1997 or 1998)	Completion year (1997, 1998 or beyond)	In response to competition from gaming venues?	
Eg. Repainting of bar area	*$5,000*	*1997*	*1997*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Planned Expenditure
1999 & 2000

Q.3C Are there any improvements to buildings or facilities **planned** for your venue to be commenced in 1999 or 2000?

Yes *(Go to Q.3D)*........	1
No *(Go to Q.4A)*	2

Q.3D Please complete the tables below and indicate in the last column whether or not these improvements are in response to competition from gaming venues.

New building projects – 1999 & 2000

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	In response to competition from gaming venues?	
Eg. Extension to dining area	*$150,000*	*1999*	*2000*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1999 & 2000

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	In response to competition from gaming venues?	
Eg. Repainting of bar area	*$5,000*	*1999*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

SECTION 4: TRADING POSITION & EMPLOYMENT

Q.4A Now we'd like more detail about your trading experiences. Please complete the following table about your venue's **income**. Under Column A please write in the gross income in an **average week** for the six month periods during 1998. Under Column B, please write in the **total annual** gross income for your venue in the financial years 1996/1997 and 1997/1998.

Estimates are acceptable where actual figures are not available.

	A		**B**	
	Average gross income per week		**Total annual gross income**	
Trade area	1 January 1998 to 30 June 1998	1 July 1998 to 31 December 1998	1 July 1996 to 30 June 1997	1 July 1997 to 30 June 1998
Bar trade				
Meals trade				
Entertainment...............				
Accommodation				
Conferences.................				
All other income				

Q.4B Now we'd like some **employment** details. Please write in the **total hours** worked in the **week ending** on the date shown under each column. *Estimates are acceptable where actual figures are not available.*

Total hours worked (including overtime)…

	By full time staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment...............				
Accommodation				
Conferences.................				
Administration				
Other............................				

	By part time/casual staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment...............				
Accommodation				
Conferences.................				
Administration				
Other............................				

Note: Some questions, particularly Q.4A and Q.4B, were asked to collect data for another of the Authority's 98-99 research projects 'The Economic Impact of Gaming' and the results are therefore not reported in this report.

SECTION 5 – EFFECT OF GAMING ON VENUES

Q.5A Please circle a number under Column A to show how your current trading position compares with that prior to the introduction of EGMs into Victoria in July 1992 (i.e. has your gross income increased or decreased)? And then in Column B, write in the percentage change if it has increased or decreased.

	A Please indicate if there has been an increase or decrease in gross income since the introduction of EGMs			**B** Estimate the percentage change in gross income for each trade area
Trade Area	Increase	Same	Decrease	% Change
Bar trade	1	2	3	
Meals trade	1	2	3	
Entertainment......................	1	2	3	
Accommodation	1	2	3	
Conferences.........................	1	2	3	
All other income	1	2	3	
TOTAL	1	2	3	

Q.5B Please indicate in the table below to what extent your venue **subsidises** any of the following trade areas:

	Please indicate extent of subsidy		
Trade Area	Not subsidised	Small subsidy	Large subsidy
Bar trade..............................	1	2	3
Meals trade..........................	1	2	3
Entertainment	1	2	3

Q.5C What are your total opening hours per week? WRITE IN TOTAL OPENING HRS PER WEEK.... ______

Q.5D On any day are you open 24 hours?

Yes 1

No.............................. 2

Q.5E Have you made changes to your hours of operation since the introduction of electronic gaming machines into Victoria in July 1992?

Yes - Increased 1

Yes – Decreased 2

No change 3

If **increased** or **decreased**, by how many hours per week have you changed your opening hours?

WRITE IN HOURS PER WEEK INCREASED/DECREASED........... ______

Q.5F Have you noticed a change in the type of people coming to your venue since the introduction of electronic gaming machines into Victoria?

Yes 1

No.............................. 2

If **yes**, please provide a short description of these changes.

....

....

....

....

SECTION 5 – EFFECT OF GAMING ON VENUES cont…

Q.5G Since the introduction of electronic gaming machines into Victoria, what type of new groups or target markets have you attempted to attract to your venue? Please indicate if these endeavours were successful.

	Type of new group or target market	*Was this endeavour successful?* Yes	No
a)		1	2
b)		1	2
c)		1	2
d)		1	2

Q.5H And, since the introduction of electronic gaming machines into Victoria do you think there has been an improvement or a decline in these aspects at **your establishment** …

		Improvement in opportunities	No change	**Decline** in opportunities	(Don't know/ not applicable)
a)	Dining opportunities....................	1	2	3	4
b)	Entertainment opportunities (excluding EGMs)	1	2	3	4
c)	Quality of the internal facilities.....	1	2	3	4
d)	Accommodation at your venue....	1	2	3	4
e)	Conference facilities at your venue	1	2	3	4

CATI: What in particular about the… has improved/declined?
(For each aspect in Q5H)

SECTION 6 – LIVE ENTERTAINMENT

Q.6A Does your venue have **live** entertainment?

Yes	1
No (*Go to Section 7*)	2

Q.6B What type of live entertainment does your venue provide? *(Circle as many as applicable)*

Cover Bands	1
Original Bands	2
Solo acts	3
Duo acts	4
Cabaret	5
Comedians	6
Children's entertainers	7
Other live entertainment *(Specify)*	8

Q.6C How many times a week do you have live entertainment?

WRITE IN NO. TIMES PER WEEK ______

Q.6D At **your venue**, has there been an increase or decrease in opportunities for entertainers since the introduction of electronic gaming machines into Victoria?

Increase	1
The same	2
Decrease	3
(Don't know)	4

Q.6E If **increased** or **decreased**: What would you say are the main contributors to this increase or decrease?

....

....

....

....

....

....

SECTION 7 – EXTERNAL IMPACT ON VENUES

Q.7 Do you think any of the following factors have had, or will have, an affect on your business:

	Positive Impact	Negative Impact	No Impact	Don't Know
a) Theme pubs *(Irish pubs etc.)*	1	2	3	4
b) Extended trading hours at **your** venue	1	2	3	4
c) Extended trading hours at **other** venues	1	2	3	4
d) Changes in alcohol consumption patterns	1	2	3	4
e) Changes in attitudes to drink driving	1	2	3	4
f) Ageing society	1	2	3	4
g) Changes in liquor licensing laws (*can now serve alcohol at restaurants/cafes without food)*	1	2	3	4
h) Emergence of Café style hotels	1	2	3	4
i) Competition from gaming venues	1	2	3	4
j) General economic condition	1	2	3	4
k) Changes in leisure patterns and preferences	1	2	3	4
l) Development of the area as a tourist destination	1	2	3	4

PLEASE TURN OVER

SECTION 8 – CONTRIBUTIONS TO THE COMMUNITY

Q.8 Did you make any contributions to the community in the period 1 January 1998 to 31 December 1998?

Yes	1
No..............................	2

If **YES**, please complete the following table in detail specifying type, location and value of the contributions made in 1998.

TYPE OF CONTRIBUTION MADE IN 1998	ORGANISATION TYPE RECEIVING CONTRIBUTION	$ DOLLAR VALUE	MAIN REASON FOR MAKING CONTRIBUTION (Please circle one main reason only)					
			Contin-uation of past practice	Relation-ship to the operation of the venue	Opportun-ity to increase interest and patronage	Personal involve-ments & associa-tions of the operator/ manager	Desire to make a positive contribu-tion to the commun-ity	Other
Example: Provision of Gymnasium Equipment	*Football Club*	*$5,000*						
ASSETS (physical transfer of ownership)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
FACILITIES (free/ subsided use of facilities or resources including staff time and discounts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
DONATIONS (money or gifts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
d)			1	2	3	4	5	6
SPONSORSHIP (money or gifts in exchange for publicity)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
OTHER SUPPORT (other benefits)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6

TOTAL AMOUNT CONTRIBUTED	$

Market Solutions

Market Research Consultants
Norwood House, 17 Norwood Crescent
Moonee Ponds, Vic., 3039
Ph: (03) 9372 8400 Fax: (03) 9372 8411

VICTORIAN CASINO & GAMING AUTHORITY
HOTEL AND CLUB GAMING IMPACT STUDY 1999

(Ref: 0654)

CLUB SURVEY
Non-gaming Clubs

SECTION 1: VENUE DESCRIPTION

Q.1A Please indicate the category which most accurately describes your venue.
Circle one number

Sports club	1
RSL club	2
Community or social club	3
Other club (Specify)	4

Q.1B Please indicate the number of members you currently have…

WRITE IN NUMBER OF **FULL** MEMBERS

____

WRITE IN NUMBER OF **OTHER** MEMBERS

____

SECTION 2: TRADING EXPERIENCE & EXPECTATIONS

Q.2A How did your trading position at June 1998 compare with June 1997?

CATI: What are the main reasons for your trading position being …?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

Q.2B And compared to your current position, in the next financial year 1999/2000, do you expect your trading position (turnover) to be…?

CATI: What are the main reasons for saying your future trading position will be …?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

Q.2C What changes, if any, to the overall **patronage** at your venue were experienced in 1998 compared to 1997?

CATI: What has been the main reasons for your patronage being…?

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5

SECTION 3 – VENUE EXPENDITURE ON BUILDINGS & FACILITIES

Actual Expenditure
1997 & 1998

Q.3A In 1997 or 1998 were there any improvements to buildings or facilities at your venue **completed** or **commenced** *(but not completed)*?

Yes *(Go to Q.3B)*........ 1

No *(Go to Q.3C)*......... 2

Q.3B Please complete the tables below and indicate in the last column whether or not this improvement was in response to competition from gaming venues.

New building projects – 1997 & 1998

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1997 or 1998)	Completion year (1997, 1998 or beyond)	In response to competition from gaming venues?	
Eg. Extension to dining area	*$150,000*	*1997*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1997 & 1998

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1997 or 1998)	Completion year (1997, 1998 or beyond)	In response to competition from gaming venues?	
Eg. Repainting of bar area	*$5,000*	*1997*	*1997*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Planned Expenditure
1999 & 2000

Q.3C Are there any improvements to buildings or facilities **planned** for your venue to be commenced in 1999 or 2000?

Yes *(Go to Q.3D)*........ 1

No *(Go to Q.4A)* 2

Q.3D Please complete the tables below and indicate in the last column whether or not these improvements are in response to competition from gaming venues.

New building projects – 1999 & 2000

(New buildings and extensions to existing buildings, i.e. net addition to floor space)

Description of new building project	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	In response to competition from gaming venues?	
Eg. Extension to dining area	*$150,000*	*1999*	*2000*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

Facility improvements/renovations – 1999 & 2000

(Improved facilities, for example new kitchen facilities in existing building, i.e. alterations/refurbishment of existing floor space)

Description of facility improvements or renovations	Total value of works	Commence ment year (1999 or 2000)	Completion year (1999, 2000 or beyond)	In response to competition from gaming venues?	
Eg. Repainting of bar area	*$5,000*	*1999*	*1999*	Yes	No
a)				1	2
b)				1	2
c)				1	2
d)				1	2

SECTION 4: TRADING POSITION & EMPLOYMENT

Q.4A Now we'd like more detail about your trading experiences. Please complete the following table about your venue's **income**. Under Column A please write in the gross income in an **average week** for the six month periods during 1998. Under Column B, please write in the **total annual** gross income for your venue in the financial years 1996/1997 and 1997/1998.

Estimates are acceptable where actual figures are not available.

	A		**B**	
	Average gross income per week		**Total annual gross income**	
Trade area	1 January 1998 to 30 June 1998	1 July 1998 to 31 December 1998	1 July 1996 to 30 June 1997	1 July 1997 to 30 June 1998
Bar trade				
Meals trade				
Entertainment...............				
Accommodation				
Conferences.................				
All other income				

Q.4B Now we'd like some **employment** details. Please write in the **total hours** worked in the **week ending** on the date shown under each column. *Estimates are acceptable where actual figures are not available.*

Total hours worked (including overtime)…

	By full time staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment...............				
Accommodation				
Conferences.................				
Administration				
Other............................				

	By part time/casual staff in the week ending…			
	29 June 1997	21 December 1997	28 June 1998	20 December 1998
Bar area				
Meals area				
Entertainment...............				
Accommodation				
Conferences.................				
Administration				
Other............................				

Note: Some questions, particularly Q.4A and Q.4B, were asked to collect data for another of the Authority's 98-99 research projects 'The Economic Impact of Gaming' and the results are therefore not reported in this report.

SECTION 5 – EFFECT OF GAMING ON VENUES

Q.5A Please circle a number under Column A to show how your current trading position compares with that prior to the introduction of EGMs into Victoria in July 1992 (i.e. has your gross income increased or decreased)? And then in Column B, write in the percentage change if it has increased or decreased.

	A Please indicate if there has been an increase or decrease in gross income since the introduction of EGMs			**B** Estimate the percentage change in gross income for each trade area
Trade Area	Increase	Same	Decrease	% Change
Bar trade	1	2	3	
Meals trade	1	2	3	
Entertainment......................	1	2	3	
Accommodation	1	2	3	
Conferences........................	1	2	3	
All other income	1	2	3	
TOTAL	1	2	3	

Q.5B Please indicate in the table below to what extent your venue **subsidises** any of the following trade areas:

	Please indicate extent of subsidy		
Trade Area	Not subsidised	Small subsidy	Large subsidy
Bar trade.............................	1	2	3
Meals trade..........................	1	2	3
Entertainment	1	2	3

Q.5C What are your total opening hours per week? WRITE IN TOTAL OPENING HRS PER WEEK.... ______

Q.5D On any day are you open 24 hours?

Yes 1

No.............................. 2

Q.5E Have you made changes to your hours of operation since the introduction of electronic gaming machines into Victoria in July 1992?

Yes - Increased 1

Yes – Decreased 2

No change 3

If **increased** or **decreased**, by how many hours per week have you changed your opening hours?

WRITE IN HOURS PER WEEK INCREASED/DECREASED........... ______

Q.5F Have you noticed a change in the type of people coming to your venue since the introduction of electronic gaming machines into Victoria?

Yes 1

No.............................. 2

If **yes**, please provide a short description of these changes.

....

....

....

....

SECTION 5 – EFFECT OF GAMING ON VENUES cont…

Q.5G Since the introduction of electronic gaming machines into Victoria, what type of new groups or target markets have you attempted to attract to your venue? Please indicate if these endeavours were successful.

	Type of new group or target market	*Was this endeavour successful?* Yes	No
a)		1	2
b)		1	2
c)		1	2
d)		1	2

Q.5H And, since the introduction of electronic gaming machines into Victoria do you think there has been an improvement or a decline in these aspects at **your establishment** …

		Improvement in opportunities	No change	**Decline** in opportunities	(Don't know/ not applicable)
a)	Dining opportunities....................	1	2	3	4
b)	Entertainment opportunities (excluding EGMs)	1	2	3	4
c)	Quality of the internal facilities.....	1	2	3	4
d)	Accommodation at your venue....	1	2	3	4
e)	Conference facilities at your venue	1	2	3	4

CATI: Has there been an improvement or a decline in the quality of sporting facilities at your venue?

Has there been an improvement or a decline in the Social elements of this club?

What in particular about the… has improved/declined?
(For each of the aspects in Q5H)

SECTION 6 – LIVE ENTERTAINMENT

Q.6A Does your venue have **live** entertainment?

Yes	1
No (*Go to Section 7*)	2

Q.6B What type of live entertainment does your venue provide? *(Circle as many as applicable)*

Cover Bands	1
Original Bands	2
Solo acts	3
Duo acts	4
Cabaret	5
Comedians	6
Children's entertainers	7
Other live entertainment *(Specify)*	8

Q.6C How many times a week do you have live entertainment?

WRITE IN NO. TIMES PER WEEK .... ______

Q.6D At **your venue**, has there been an increase or decrease in opportunities for entertainers since the introduction of electronic gaming machines into Victoria?

Increase	1
The same	2
Decrease	3
(Don't know)	4

Q.6E If **increased** or **decreased**: What would you say are the main contributors to this increase or decrease?

....

....

....

....

....

....

SECTION 7 – EXTERNAL IMPACT ON VENUES

Q.7 Do you think any of the following factors have had, or will have, an affect on your business:

	Positive Impact	Negative Impact	No Impact	Don't Know
a) Theme pubs *(Irish pubs etc.)*	1	2	3	4
b) Extended trading hours at **your** venue	1	2	3	4
c) Extended trading hours at **other** venues	1	2	3	4
d) Changes in alcohol consumption patterns	1	2	3	4
e) Changes in attitudes to drink driving	1	2	3	4
f) Ageing society	1	2	3	4
g) Changes in liquor licensing laws (*can now serve alcohol at restaurants/cafes without food)*	1	2	3	4
h) Emergence of Café style hotels	1	2	3	4
i) Competition from gaming venues	1	2	3	4
j) General economic condition	1	2	3	4
k) Changes in leisure patterns and preferences	1	2	3	4
l) Development of the area as a tourist destination	1	2	3	4

PLEASE TURN OVER

SECTION 8 – CONTRIBUTIONS TO THE COMMUNITY

Q.8 Did you make any contributions to the community in the period 1 January 1998 to 31 December 1998?

Yes	1
No..............................	2

If **YES**, please complete the following table in detail specifying type, location and value of the contributions made in 1998.

TYPE OF CONTRIBUTION MADE IN 1998	ORGANISATION TYPE RECEIVING CONTRIBUTION	$ DOLLAR VALUE	MAIN REASON FOR MAKING CONTRIBUTION (Please circle one main reason only)					
			Contin-uation of past practice	Relation-ship to the operation of the venue	Opportun-ity to increase interest and patronage	Personal involve-ments & associa-tions of the operator/ manager	Desire to make a positive contribu-tion to the commun-ity	Other
Example: Provision of Gymnasium Equipment	*Football Club*	*$5,000*						
ASSETS (physical transfer of ownership)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
FACILITIES (free/ subsided use of facilities or resources including staff time and discounts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
DONATIONS (money or gifts)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
d)			1	2	3	4	5	6
SPONSORSHIP (money or gifts in exchange for publicity)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6
OTHER SUPPORT (other benefits)								
a)			1	2	3	4	5	6
b)			1	2	3	4	5	6
c)			1	2	3	4	5	6

TOTAL AMOUNT CONTRIBUTED	$

APPENDIX 2

Patron Survey Questionnaire

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VICTORIAN CASINO & GAMING AUTHORITY
HOTEL & CLUB GAMING IMPACT STUDY
PATRON SURVEY

INTRODUCTION:

Good (…) my name is (…) from Market Solutions, a market research company. We are conducting an important research study on behalf of a Victorian Government Authority about your experiences when visiting hotels and clubs. IF NECESSARY SAY: We need to talk to people aged over 18 year. The survey will take about 10 minutes. As part of our quality procedures, my supervisor may listen to parts of this interview. All of your answers will be held in the strictest confidence.

Before we start the interview we'd like to clarify that hotels may include pubs and nightclubs. The Crown Casino in not classified as a Hotel. Clubs are non-profit organisations such as the RSL, football clubs, bowling clubs and social clubs. To enter a club you need to be a member or to 'sign in', whereas hotels are open to the general public. A hotel or club is considered 'gaming' if it has electronic gaming machines (pokies) on its premises. Today we would like you to just think about Victorian venues.

SECTION 1 – HOTEL/CLUB VISITATION

Q.1 Which of the following types of venues have you been to in the last 6 months? (READ OUT) (ACCEPT MULTIPLES)

Non-gaming hotel...........................	1	
Gaming hotel (not casino)..............	2	
Non-gaming club (eg. RSL, Bowls)	3	
Gaming club (not casino eg. RSL)..	4	
Crown Casino.................................	5	
None of the above	6	Terminate
(Don't know)	7	

(CONTINUE IF BEEN TO A HOTEL/CLUB IN THE LAST 6 MONTHS, OTHERWISE TERMINATE)

Q.2 FOR EACH TYPE OF VENUE IN Q.1 ASK:
How often do you go to a (insert answer from Q.1)?
(READ OUT)

More than 3 times a week	1
2 to 3 times a week..........................	2
Once a week	3
Once a fortnight..............................	4
Once a month	5
Once every 2 to 3 months...............	6
Every 6 months	7
Once a year.....................................	8
Less often	9
(Don't know)	10

Q.3 Just to check, which of the following types of venues do you go to the MOST?
(READ OUT) (ONE RESPONSE ONLY)

Non-gaming hotels	1
Gaming hotels (not casino)	2
Non-gaming clubs	3
Gaming clubs (not casino)	4

Q.4 What is the **main purpose** for your visits to (insert Q.3)?
(DO NOT READ OUT) (ACCEPT ONE RESPONSE ONLY)

Dining	1
Drinking	2
Live entertainment	3
Socialising	4
Playing EGMs	5
To use TAB facilities	6
Other (specify)	7
(Don't know)	8

Q.5a Thinking about hotels and clubs, but excluding the casino, do you **prefer** gaming or non-gaming venues? (ONE RESPONSE ONLY)

Prefer gaming venues	1	
Prefer non-gaming venues	2	
Do not have a preference	3	Skip to Q. 6
(Don't know)	4	

Q.5b Why do you prefer (insert answer Q.5a)?

Q.6 Do you prefer hotels or clubs?

(RECORD VERBATIM)

SECTION 2 – USAGE OF EGMs

Q.7 In the past 6 months, have you played electronic gaming machines at a…?
(READ OUT) (ACCEPT MULTIPLES)

Gaming hotel	1
Gaming club	2
Or Crown Casino	3
(Have not played EGMs in last 6 months)	4
(Don't know)	5

(CONTINUE IF PLAYED EGMs IN THE LAST 6 MONTHS, OTHERWISE SKIP TO Q.10)

Q.8 And which of these venues do you go to the MOST to play electronic gaming machines?
(READ OUT) (ONE RESPONSE ONLY)

Gaming hotels	1
Gaming clubs	2
Or Crown Casino	3
(Don't know)	4

Q.9 In general, how often do you play electronic gaming machines?
(READ OUT)

More than 3 times a week	1
2 to 3 times a week.........................	2
Once a week	3
Once a fortnight..............................	4
Once a month	5
Once every 2 to 3 months...............	6
Every 6 months	7
Once a year.....................................	8
Less often	9
(Don't know)	10

SECTION 3 – FACILITIES AT VENUES

Q.10 Electronic gaming machines (pokies) were introduced into Victoria in July 1992. Since the introduction of EGMs into Victoria, do you think there has been an improvement or a decline in the following aspects at (insert answer from Q.3)…

Q.A1 Has **dining** improved, declined or not changed?
(Wait for response, if improved or declined, is that a little or a lot?)
(Prompt if necessary: Since EGMs were introduced into Victoria in 1992)

Improved a lot	1
Improved a little	2
No change	3
Declined a little	4
Declined a lot	5
(Don't know)	6

Q.A2 What in particular has improved/declined?
(DO NOT READ OUT) (PROBE FULLY)

Quality of food	1
Price of food...................................	2
Greater variety of food	3
Refurbishment of the dining area	4
Other (specify)	5
(Don't know)	6

Q.B1 Has **entertainment** (excluding EGMs) improved, declined or not changed?
(Wait for response, if improved or declined, is that a little or a lot?)
(Prompt if necessary: Since EGMs were introduced into Victoria in 1992)

Improved a lot	1
Improved a little	2
No change	3
Declined a little	4
Declined a lot	5
(Don't know)	6

Q.B2 What in particular has improved/declined? (PROBE FULLY)

(RECORD VERBATIM)

Q.C1 Have the **quality of facilities** at (insert answer Q.3) improved, declined or not changed?
(Wait for response, if improved or declined, is that a little or a lot?)
(Prompt if necessary: Since EGMs were introduced into Victoria in 1992)

Improved a lot	1
Improved a little	2
No change	3
Declined a little	4
Declined a lot	5
(Don't know)	6

Q.C2 What in particular has improved/declined? (PROBE FULLY)

(RECORD VERBATIM)

Q.D1 (CLUB PATRONS ONLY) Have the **sporting facilities** at (Q.3) improved, declined or not changed since the introduction of EGMs into Victoria?
(Wait for response, if improved or declined, is that a little or a lot?)

Improved a lot	1
Improved a little	2
No change	3
Declined a little	4
Declined a lot	5
(Don't know)	6

Q.D2 What in particular has improved/declined? (PROB FULLY)

(RECORD VERBATIM)

Q.E1 (CLUB PATRONS ONLY) Have the **social elements** at (Q.3) improved, declined or not changed since the introduction of EGMs into Victoria?
(Wait for response, if improved or declined, is that a little or a lot?)

Improved a lot	1
Improved a little	2
No change	3
Declined a little	4
Declined a lot	5
(Don't know)	6

Q.E2 What in particular about the social element has improved/declined? (PROB FULLY)

(RECORD VERBATIM)

Q.11 Are there any other aspects of (insert Q.3) that have **improved** since the introduction of EGMs into Victoria? (PROBE FULLY)

(RECORD VERBATIM)

Q.12 Are there any other aspects of (insert Q.3) that have **declined** since the introduction of EGMs into Victoria? (PROBE FULLY)

(RECORD VERBATIM)

SECTION 4 – LIVE ENTERTAINMENT

Q.13 Now we'd like to talk about the impact of the introduction of EGMs on opportunities for **live entertainment**. By live entertainment we mean cover or original bands, solo or duo musicians, comedians or cabaret (and excludes EGMs).

Have you been to a hotel or club with 'live entertainment' in the last 6 months?

Yes	1
No..	2
(Don't know)	3

(CONTINUE IF BEEN TO A HOTEL/CLUB WITH LIVE ENTERTAINMENT IN THE LAST 6 MONTHS, OTHERWISE SKIP TO Q.17)

Q.14 How often do you go to a hotel or club to see… ? (RESPONSE FOR EACH)

i. Live cover bands
ii. Live original bands
iii. Solo or duo musicians
iv. Cabaret shows
v. Stand up comedians

Once a week or more......................	1
Once a fortnight..............................	2
Once a month	3
Once every 2 to 3 months...............	4
Every 6 months	5
Once a year.....................................	6
Less often/never	7
(Don't know)	8

Q.15 Since the introduction of EGMs into Victoria, do you believe there has been an improvement or a decline in the opportunities to see live entertainment at …?
(Wait for response, if improved or declined, is that a little or a lot?) (RESPONSE FOR EACH)

i. Non-gaming hotels
ii. Gaming hotels
iii. Non-gaming clubs
iv. Gaming clubs

Improved a lot	1
Improved a little	2
No change	3
Declined a little	4
Declined a lot	5
(Don't know)	6

Q.16 What in particular about the opportunity to see live entertainment has improved/declined? (PROBE FULLY) (RESPONSE FOR EACH)

(RECORD VERBATIM)

SECTION 6: CHANGES IN PATRONAGE

Q.17 Have you changed the number of times you go to hotels or clubs since the introduction of EGMs into Victoria in 1992? *(Wait for response, if yes is that more or less now compared to prior to the introduction of EGMs?).*

Yes - more........................	1
Yes- less...........................	2
No change	3
(Don't know)....................	4

Q.18 Do you think any of the following aspects have had or will have any impact on the number of times you go to hotels and clubs? (*Wait for response, if yes is that an increase or decrease?*) (RESPONSE FOR EACH)

a) Increase in the number of theme pubs (like Irish pubs, sports bars etc.)
b) Extended trading hours of venues
c) Attitude to drink driving
d) Introduction of EGMs into Victoria
e) Changes in liquor licensing laws which enable you to drink alcohol at restaurants and cafes without ordering food
f) Personal lifestyle changes (like your job, age, family etc.)

Increase 1
Decrease........................... 2
No impact.......................... 3
(Don't know).................... 4

SECTION 7: COMMUNITY BENEFITS

Q.19a) From your own point of view, do you think there have been any tangible **benefits** to your local community since the introduction of electronic gaming machines into Victoria?

Yes 1
No 2
(Don't know).................... 3

Q.19b) If yes, what are these benefits? (PROBE FULLY)

(RECORD VERBATIM)

Q.20a) From your own point of view, do you think there are any **disadvantages** to your local community since the introduction of electronic gaming machines into Victoria?

Yes 1
No 2
(Don't know).................... 3

Q.20b) If yes, what are these disadvantages? (PROBE FULLY)

(RECORD VERBATIM)

SECTION 6: DEMOGRAPHICS

Q.21 Finally, just a couple of questions to help us analyse your answers. Are you from a Non English Speaking Background?

Yes 1
No 2

Q.22 RECORD GENDER

Male 1
Female.............................. 2

Q.23 Which age group do you belong to? Are you...?

18 - 24 years......................	1
25 - 34 years......................	2
35 - 44 years......................	3
45 - 54 years......................	4
55 - 64 years......................	5
65+ years...........................	6

Q.24 Which of the following groups best describes you? **READ OUT**

Young single..	1
Young couple - no children	2
Young family - youngest child under 6 years..............	3
Middle family - youngest child 6-15	4
Mature family - youngest child at home over 15.........	5
Older couple - no child living at home	6
Mature single	7
Other (Specify)	8
(Refused)..	9

Q.25 Which of the following best describes your employment status? (READ OUT)

Work full time...................	1
Work part time..................	2
Household duties...............	3
Student	4
Retired (Self supporting)...	5
Pensioner...........................	6
Unemployed......................	7
(Don’t know/can’t say)	8

(IF WORK FULL TIME CONTINUE, OTHERWISE SKIP TO Q.28)

Q.26 What is your occupation? (RECORD POSITION AND INDUSTRY)
(CODE OCCUPATION AT END OF INTERVIEW)

Q.27 As part of your current employment, do you do shift work?

Yes	1
No	2
(Don’t know).....................	3

Q.28 Into which of these categories is your personal annual pre-tax income? (READ OUT)

$0-$10,000	1
$10,001-$15,000	2
$15,001-$20,000	3
$20,001-$25,000	4
$25,001-$30,000	5
$30,001-$35,000	6
$35,001-$40,000	7
$40,001-$50,000	8
$50,001-$60,000	9
$60,001-$75,000	10
$75,001-$100,000	11
$100,001-$125,000	12
$125,001-$150,000	13
Over $150,000	14
(Don’t know/unsure).........	15
Refused	16

Q.29 And your postcode? ENTER POSTCODE........_______

Q.30 And suburb? ENTER SUBURB............_______

Q.31 Can I please have your first name (for checks by my supervisor).

THANK AND CLOSE

APPENDIX 3

Entertainer Survey Questionnaire

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VICTORIAN CASINO & GAMING AUTHORITY
HOTEL & CLUB GAMING IMPACT STUDY

ENTERTAINER SURVEY

INTRODUCTION:

Good (…) my name is (…) from Market Solutions, a market research company calling on behalf of the Victorian Casino & Gaming Authority. Today we are speaking to agents of entertainers and entertainers who work (or have worked) in the club and hotel industry on a regular basis. Are you an entertainer or an agent of entertainers working in the club and hotel industry. (REINTRODUCE IF NECESSARY) We're conducting a study which will assist the VCGA in understanding the effects of gaming on live entertainment.

IF NECESSARY SAY: It would be appreciated if we could get your opinion. The interview will take around 15 minutes. Are you free now or should we make an appointment time? All of your answers will be held in the strictest confidence.

SECTION 1 – DESCRIPTION OF RESPONDENT

Q.1a) Are you an agent or an entertainer? (IF ENTERTAINER: Are you currently working as an entertainer?)

Agent...	1
Entertainer currently working	2
Entertainer currently not working ...	3

Q.1b) At which of the following venue types have you worked or placed entertainers in the past…? (READ OUT) (ACCEPT MULTIPLES)

Gaming hotels	1
Non-gaming hotels..........................	2
Gaming clubs	3
Non-gaming clubs...........................	4
Crown Casino.................................	5

Q.1c) At which of the following venue types do you currently work or placed entertainers most frequently…?
(READ OUT) (ACCEPT ONE RESPONSE ONLY)

Gaming hotels	1
Non-gaming hotels..........................	2
Gaming clubs	3
Non-gaming clubs...........................	4
Crown Casino.................................	5

Q.1d) What type of entertainment do you provide? (ACCEPT MULTIPLES)

Cover bands	1
Original bands...................	2
Solo acts............................	3
Duo acts	4
Cabaret	5
Comedians.........................	6
Children’s entertainment...	7
Other (specify)	8

Q.1e) Currently, how many times a month do you provide entertainment for hotels and clubs?

ENTER NUMBER OF TIMES __________

SECTION 2 – EFFECT OF THE INTRODUCTION OF ELECTRONIC GAMING MACHINES

Q.2a) Would you say that the number of gigs that you had or arranged in 1998, as compared with 1997 was…(READ OUT):

Significantly more............	1
Marginally more...............	2
No change	3
Marginally less..................	4
Significantly less..............	5
(Don't know)	6

Q.2b) What has been the main contributor to the number of gigs you had or arranged in 1998 being (*insert answer to Q.2a*) than in 1997? (PROBE FULLY)

(RECORD VERBATIM)

Q.3a) Since the introduction of electronic gaming machines into Victoria, do you think there has been an increase or decrease in opportunities for live entertainers at GAMING HOTELS?

Increase	1
The Same	2
Decrease............................	3
Don’t know	4

Q.3b) What would you say are the main reasons for this (insert answer from Q.3a) ? (PROBE FULLY)

(RECORD VERBATIM)

Q.4a) Since the introduction of electronic gaming machines into Victoria, do you think there has been an increase or decrease in opportunities for live entertainers at NON-GAMING HOTELS?

Increase	1
The Same	2
Decrease............................	3
Don’t know	4

Q.4b) What would you say are the main reasons for this (insert answer from Q.4a) ? (PROBE FULLY)

(RECORD VERBATIM)

Q.5a) Since the introduction of electronic gaming machines into Victoria, do you think there has been an increase or decrease in opportunities for live entertainers at GAMING CLUBS?

Increase	1
The Same	2
Decrease...........................	3
Don't know	4

Q.5b) What would you say are the main reasons for this (insert answer from Q.5a) ? (PROBE FULLY)

(RECORD VERBATIM)

Q.6a) Since the introduction of electronic gaming machines into Victoria, do you think there has been an increase or decrease in opportunities for live entertainers at NON-GAMING CLUBS?

Increase	1
The Same	2
Decrease...........................	3
Don't know	4

Q.6b) What would you say are the main reasons for this (insert answer from Q.6a) ? (PROBE FULLY)

(RECORD VERBATIM)

Q.7a) Do you think the opening of the Crown Casino has meant an increase or decrease in opportunities for live entertainers?

Increase	1
The Same	2
Decrease...........................	3
Don't know	4

Q.7b) What would you say are the main reasons for this (insert answer from Q.7a) ? (PROBE FULLY)

(RECORD VERBATIM)

Q.8a) Have you noticed a change in the type of gigs available since the introduction of electronic gaming machines in Victoria? (PROBE FULLY: Change in venue type, music, band structure)

(RECORD VERBATIM)

SECTION 3 - NON-GAMING RELATED IMPACTS

Q.9 Do you think any of the following factors have had an impact on opportunities for live entertainers at hotels or clubs…

Q.9a) Theme pubs: (Irish pubs etc.) What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect...................	1
Negative effect.................	2
No effect	3
(Don't know)	4

Q.9a) Why do you say theme pubs have had a (insert answer Q.9a)?

(RECORD VERBATIM)

Q.9b) Extended trading hours of hotels and clubs. What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.9b) Why do you say extended trading hours have had a (insert answer Q.9b)?

(RECORD VERBATIM)

Q.9c) Changes in alcohol consumption (eg. increase in the consumption of light beer and wine instead of heavy beer, packaged alcohol taken home). What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.9c) Why do you say the changes in alcohol consumption has had a (insert answer to Q.9c)?

(RECORD VERBATIM)

Q.9d) Changes in attitudes to drink driving. What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.9d) Why do you say changes in attitudes to drink driving has had a (insert answer to Q.9d)?

(RECORD VERBATIM)

Q.9e) Ageing society. What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.9e) Why do you say that an ageing society has had a (insert answer Q.9e)?

(RECORD VERBATIM)

Q.9f) Changes in liquor licensing laws which allows restaurants and cafes to serve alcohol without food. What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.9f) Why do you say changes in liquor licensing laws have had a (insert answer Q.9f)?

(RECORD VERBATIM)

Q.9g) Emergence of Café style hotels. What impact has this had on opportunities for live entertainers at hotels or clubs? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.9g) Why do you say that the emergence of Café style hotels has had a (insert answer Q.9g)?

(RECORD VERBATIM)

Q.9h) Has there been an increase or a decrease in opportunities for live entertainers at cafes and restaurants in the past 12 months?

Increase	1
Decrease............................	2
No change	3
(Don't know)	4

Q.9h) Why do you say there has been a (insert answer Q.9h) in opportunities at cafes and restaurants?

(RECORD VERBATIM)

Q.10) Are there any factors specific to the music industry that have had an impact on the opportunities for live entertainers at hotels and clubs? (PROBE FULLY: new technology, music preferences)

(RECORD VERBATIM)

Q.11) Are there any other comments you'd like to make about the impact of the introduction of electronic gaming machines on opportunities for live entertainers?

(RECORD VERBATIM)

Q.12a) Can I please have your first name (for checks by my supervisor).

Q.12b) And your postcode? ENTER POSTCODE........________

THANK AND CLOSE

APPENDIX 4

Beneficiaries Survey Questionnaire

Market Solutions Pty Ltd
ACN 066 663 876
Norwood House
17 Norwood Crescent, Moonee Ponds, Vic., 3039
Ph: (03) 9372 8400 Fax: (03) 9372 8411
Email: marksol@ melbourne.cosmos.net.au

VICTORIAN CASINO & GAMING AUTHORITY
HOTEL & CLUB GAMING IMPACT STUDY

BENEFICIARIES SURVEY

INTRODUCTION:

Good (…) my name is (…) from Market Solutions, a market research company calling on behalf of a government authority. May I speak to someone who has knowledge of the contributions made to your organisation. (REINTRODUCE IF NECESSARY) Today we would like to talk to you about contributions to the community made by hotels and clubs. Your organisation has been identified as receiving contributions from such venues. We would like to discuss your perceptions of the benefits of such contributions and the affects of the introduction of gaming on the level of contributions received.

IF NECESSARY SAY: The survey will take about 5-10 minutes. All of your answers will be held in the strictest confidence. As part of our quality procedures, my supervisor may listen to parts of this interview.

SECTION 1 – ORGANISATION DESCRIPTION

Q.1a) Which of the following would best describe your organisation?

Sporting Club	1
Community club	2
Health/welfare organisation	3
Educational institution....................	4
Church	5
Other (specify)	6
(Don't know)..................................	7

Q.1b) In what year was this organisation established? _____________

SECTION 2 – CONTRIBUTIONS RECEIVED FROM GAMING VENUES

Firstly, we would like to talk to you about contributions from gaming venues. By gaming venues we mean hotels and clubs with electronic gaming machines (pokies). Contributions may incluse donations, sponsorship, free or subsidised use of facilities or any other support received.

Q.2a) To your knowledge does your organisation approach **gaming** venues for contributions?

Yes *(Skip to Q.3a)*	1
No...	2
(Don't know) *(Skip to Q.3a)*	3

Q.2b) Is there any reason for **not** approaching gaming venues for contributions? (PROBE FULLY)

(RECORD VERBATIM)

Q.3a) Has your organisation received direct financial or other contributions from gaming venues in the last 12 months?

Yes	1
No *(Skip to Q.4a)*	2
(Don't know) *(Skip to Q.4a)*	3

Q.3b) Which of the following types of contributions did you receive from gaming venues? (READ OUT) (ACCEPT MULTIPLES)

Assets (transfer of ownership)......................................	1
Facilities (free or subsidised use)	2
Donations (money or gifts)...	3
Sponsorship (money or gifts in exchange for publicity)	4
Other contributions (specify)..	5
(Don't know)	6

Q.3c) FOR EACH TYPE RECEIVED ASK: Can you describe these contributions? (PROBE: Description of assets/facilities, dollar value of donations/sponsorship, how often received)

(RECORD VERBATIM)

Q.3d) In your opinion, what are the main motivations of gaming venues when making contributions to your organisation?

(RECORD VERBATIM)

SECTION 3 – CONTRIBUTIONS RECEIVED FROM NON-GAMING VENUES

We would now like you to think about contributions received from non-gaming venues. By non-gaming venues we mean hotels and clubs without electronic gaming machines.

Q.4a) To your knowledge does your organisation approach **non-gaming** venues for contributions?

Yes *(Skip to Q.5a)*	1
No..	2
(Don't know) *(Skip to Q.5a)*	3

Q.4b) Is there any reason for **not** approaching non-gaming venues for contributions? (PROBE FULLY)

(RECORD VERBATIM)

Q.5a) Has your organisation received direct financial or other contributions from non-gaming venues in the last 12 months?

Yes	1
No *(Skip to Q.6a)*	2
(Don't know) *(Skip to Q.6a)*	3

Q.5b) Which of the following types of contributions have you received from non-gaming venues? (READ OUT) (ACCEPT MULTIPLES)

Assets (transfer of ownership)......................................	1
Facilities (free or subsidised use)	2
Donations (money or gifts)...	3
Sponsorship (money or gifts in exchange for publicity)	4
Other contributions (specify)..	5
(Don't know)	6

Q.5c) FOR EACH TYPE RECEIVED ASK: Can you describe these contributions? (PROBE: Description of assets/facilities, dollar value of donations/sponsorship, how often received)

(RECORD VERBATIM)

Q.5d) In your opinion, what are the main motivations of non-gaming venues when making contributions to your organisation?

(RECORD VERBATIM)

SECTION 4 – CHANGES SINCE THE INRODUCTION OF GAMING

Q.6a) Has the level of contributions made to your organisation by hotels and clubs changed since the introduction of electronic gaming machines into Victoria in July 1992? IF YES, has it increased or decreased?

Increased	1
Decreased	2
No change *(Skip to Q.7a)*	3
(Don't know) *(Skip to Q.7a)*	4

Q.6b) Has this (insert answer from Q.6a) level of contributions come from gaming or non-gaming venues?

Gaming venues	1
Non-gaming venues	2
Both gaming and non-gaming	3
(Don't know)	4

Q.6c) In what way have the contributions by (insert answer from Q.6b) increased/decreased?
(PROBE FULLY: Changes in the type and size of contributions, perceptions of reasons for change)

(RECORD VERBATIM)

SECTION 5 – COMPARISON OF VENUE TYPE

Q.7a) How do gaming venues compare to non-gaming venues in their **willingness** to make contributions?

Gaming venues more willing	1
Gaming venues less willing............	2
No difference..................................	3
(Don't know)	4

Q.7b) How do gaming venues compare to non-gaming venues in their **level** of contributions?

Gaming venues contribute more......	1
Gaming venues contribute less........	2
No difference..................................	3
(Don't know)	4

Q.8 Do you have any further comments regarding the impact of the introduction of gaming into Victoria on the contributions made to your venue?

(RECORD VERBATIM)

Q.9A Can I please have your first name (for checks by my supervisor).

Q.9B And your postcode? ENTER POSTCODE........_______

THANK AND CLOSE

APPENDIX 5

Supplier Survey Questionnaire

Market Solutions Pty Ltd
ACN 066 663 876
Norwood House
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Ph: (03) 9372 8400 Fax: (03) 9372 8411
Email: marksol@ melbourne.cosmos.net.au

VICTORIAN CASINO & GAMING AUTHORITY
HOTEL & CLUB GAMING IMPACT STUDY

SUPPLIER SURVEY

INTRODUCTION:

Good (…) my name is (…) from Market Solutions, a market research company calling on behalf of the Victorian Casino & Gaming Authority. Today we are speaking to managers of companies who supply to the hotel and club industry. Does this company supply to the hotel and club industry? (REINTRODUCE IF NECESSARY) We're conducting a very important study which will assist the VCGA in understanding the effects of gaming.

IF NECESSARY SAY: It would be appreciated if we could get your opinion. The interview will take 10-15 minutes. Are you free now or should we make an appointment time? All of your answers will be held in the strictest confidence.

SECTION 1 – DESCRIPTION OF RESPONDENT

Q.1a) Do you supply to…? (READ OUT)

Hotels................................	1
Clubs................................	2
Both hotels and clubs........	3

Q.1b) And, do you supply to…? (READ OUT)

Gaming venues................................	1
Non-gaming venues	2
Both gaming and non-gaming venues	3

Q.1c) What type of goods do you supply to clubs and hotels?

(RECORD VERBATIM)

SECTION 2 – IMPACT OF INTROUCTION OF GAMING

Q.2a) I'd like to talk to you about how your organisation is performing in general terms and then about the impact of gaming.

Firstly, overall would you say your trading position (turnover) at June 1998 as compared with June 1997 was … (READ OUT):

Significantly better............	1
Marginally better...............	2
No change	3
Marginally worse	4
Significantly worse	5
(Don't know)	6

Q.2b) What are the main reasons for your trading position being (*insert answer to Q.2a*) ?
(PROBE FULLY: Special promotions, improved facilities, EGMs etc.)

(RECORD VERBATIM)

Q.2c) And in the 1999/2000 financial year do you expect your trading position (turnover) to be…
(READ OUT):

Significantly better	1
Marginally better	2
No change	3
Marginally worse	4
Significantly worse	5
(Don't know)	6

Q.2d) What are the main reasons for saying your trading position will be (*insert answer to Q.2c*) ?. (PROBE FULLY)

(RECORD VERBATIM)

Q.3a) *In general*, has the introduction of gaming venues has affected the financial viability of suppliers to hotels and clubs? Are they now … (READ OUT)

More financially viable	1
No change	2
Less financially viable	3
(Don't know)	4

Q.3b) Why do you say that suppliers to hotels and clubs are now (*insert answer Q.3b*)?

(RECORD VERBATIM)

Q.3c) Do you think the introduction of gaming to venues has affected the financial viability of *your company* in particular? Is it now … (READ OUT)

More financially viable	1
No change	2
Less financially viable	3
(Don't know)	4

Q.3d) Why do you say that your company is now (*insert answer Q.3c*)?

(RECORD VERBATIM)

Q.3e) Other than financial viability, has the introduction of gaming venues had any impact on your company? (PROBE: In what way?)

(RECORD VERBATIM)

Q.4a) And what about your staff. Has there been an increase or decrease in employment opportunities?

Increase	1
The same	2
Decrease	3
(Don't know)	4

Q.4b) What would you say are the main contributors to this (insert answer Q.4a)?

(RECORD VERBATIM)

SECTION 3 - NON-GAMING RELATED IMPACTS

Q.5 Do you think any of the following factors have had an impact on your business.

Q.5a) Theme pubs: (Irish pubs etc.) What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5a) Why do you say theme pubs have had a (insert answer Q.5a)?

(RECORD VERBATIM)

Q.5b) Extended trading hours of hotels and clubs. What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5b) Why do you say extended trading hours have had a (insert answer Q.5b)?

(RECORD VERBATIM)

Q.5c) Changes in alcohol consumption (eg. increase in the consumption of light beer and wine instead of heavy beer, packaged alcohol taken home). What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5c) Why do you say the changes in alcohol consumption has had a (insert answer to Q.5c)?

(RECORD VERBATIM)

Q.5d) Changes in attitudes to drink driving. What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5d) Why do you say changes in attitudes to drink driving has had a (insert answer to Q.5d)?

(RECORD VERBATIM)

Q.5e) Ageing society. What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5e) Why do you say that an ageing society has had a (insert answer Q.5e)?

(RECORD VERBATIM)

Q.5f) Changes in liquor licensing laws which allows restaurants and cafes to serve alcohol without food. What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5f) Why do you say changes in liquor licensing laws have had a (insert answer Q.5f)?

(RECORD VERBATIM)

Q.5g) Emergence of Café style hotels. What impact has this had on your business? (READ OUT)

Positive effect....................	1
Negative effect..................	2
No effect	3
(Don't know)	4

Q.5g) Why do you say that the emergence of Café style hotels has had a (insert answer Q.5g)?

(RECORD VERBATIM)

Q.6 Are there any other comments you'd like to make about the impact of the introduction of electronic gaming machines on your business?

(RECORD VERBATIM)

Q.7a) Can I please have your first name (for checks by my supervisor).

Q.7b) And your postcode? ENTER POSTCODE........________

THANK AND CLOSE

APPENDIX 6

Community Support Fund
Project Details

COMMUNITY SUPPORT FUND GRANTS – ANNOUNCED PROJECTS AS AT 30 JUNE 1999

Families In Crisis	$
Melbourne Foodbank - for the distribution of excess food to those in need	400,000
Geelong Foodbank - for the distribution of excess food to those in need........................	115,500
Victims of Child Abuse - services and support	3,700,000
Families with Severely Disabled Children - assist with the provision of respite care and other supports for families with severely disabled children......................................	5,485,717
Supporting families in crisis - expansion of existing child and family welfare programs to families in crisis	1,850,000
Family and parenting programs - supporting families with children / adolescents 0-18 years old to deal with family and parenting crises	5,900,000
Relocation and fitout of St Albans Community Support & Assistance Program premises..	6,500
Smith Family premises refurbishment	420,000
Total: Families in Crisis	**$17,877,717**
Initiatives to Address Problem Gambling	
Research Studies - to assist in the design of future problem gambling, financial and family counselling services...	1,506,000
Initiatives to address problem gambling - Establishment of problem gambling counselling services	4,143,000
Financial counselling- expansion of services across Victoria	1,715,926
Community Education on Problem Gambling - A community education campaign to raise awareness of the possible impact of gambling and to inform problem gamblers and their families of available support services. The campaign involves television, radio and billboard advertising..	2,509,000
Statewide Family Skills Centre and Regional Family Resource Centre Co-ordination of family education and counselling to supplement existing problem gambling services	6,562,200
Innovative Approaches to Financial Counselling - services with a focus on developing innovative approaches to financial counselling	2,921,000
Innovative Service Models for Non-English Speaking Background (NESB) Communities - program designed to make problem gambling and financial counselling services more accessible and responsive to the needs of individuals and families from non-English speaking backgrounds	2,070,100
Problem Gambling Program Expansion - increase in the number of problem gambling counselling services across the State	4,221,000
City-based Problem Gambling Service - Pilot project based in Melbourne CBD designed to provide an integrated problem gambling and financial counselling service	655,450
The Smith Family - extension of professional crisis and financial counselling service ...	750,000
Consolidation of Problem Gambling Program - Consolidation of problem gambling counselling and liaison services introduced throughout Victoria through the Compulsive Gambling Program. This new program is designed to ensure the continuation, development, and where appropriate, refinement and adjustment of the services provided	7,304,043

Initiatives to Address Problem Gambling – Cont.	$
Community Education on Problem Gambling - development of the next phase of the state wide advertising campaign	5,000,000
Problem Gambling Strategy 1999 – 2002	21,025,000
Total: Initiatives to Address Problem Gambling	**$60,382,719**
Youth	
Street Kids - Supported accommodation assistance program	1,000,000
Intensive Training and Employment Support Program - to assist disadvantaged young people to participate in employment, education and training programs	4,848,831
Housing Access and Support Services - a program designed to improve access to long term housing for young homeless people	1,900,000
Parent Education and Support - education and peer support programs for parents of adolescents exhibiting difficult behaviour and for adolescents who become parents	1,645,455
Open Family	25,000
Intensive Youth Support Services - a program to establish youth support and accommodation services for homeless young people with extreme and difficult behaviour	1,575,000
Crisis Accommodation Capital Facilities - upgrade and expansion of capital resources	1,925,000
Sexual Assault Services - establishment of services to deliver intensive support to victims of sexual abuse	1,380,000
Establishment of Family Reconciliation and Support Services	1,620,000
Major Infrastructure for Homeless Youth Services - Program to establish major capital facilities for emergency accommodation and/or support services for homeless youth in high need suburban and country areas	2,000,000
VRAP 9 - payment of transportation costs for every Year 9 student in rural and regional Victoria to participate in the Victorian Performing Arts Centre Arts Education Program	3,700,000
STAR 6 - payment of transport costs for every Year 6 student in rural and regional Victoria to participate in the Scienceworks Access Program	1,500,000
Urban Camp Redevelopment and Facilities Upgrade	1,145,000
Cottage by the Sea fire safety installations	60,500
Anderson's Creek Hall	200,000
Evaluation of pre-driver education programs at Charlton and Alexandra Secondary Colleges	20,000
Upgrade of buildings and facilities at The Portsea Camp	481,574
Development of the Horsham Youth Resource Centre	230,000
St Kilda Police & Citizens Youth Club refurbishment	75,000
Total : Youth	**$25,331,360**
Arts	
Moomba - operating assistance	80,000
Victorian Arts Centre, George Fairfax Studio refurbishment - upgrade and expansion of Theatre	355,000
Geelong Performing Arts Centre, Blakiston Theatre seating - upgrade seating and increase seating capacity	150,000

Arts – Cont.	$
Jewish Museum of Australia - installation of air conditioning system.	125,000
Eureka Anniversary Exhibition - to establish a touring exhibition and for the rehousing and preservation of the Eureka Flag	115,350
The Victoria Commissions - a fund that will enable the commission of new major artistic works	2,200,000
Arts Victoria Leadership Fund - establishment of a training and development program for Victorian arts managers	1,000,000
Arts Victoria Arts Marketing Task Force - promotion of best practice marketing in the arts industry	750,000
Arts Victoria Cultural Exchange Program - to foster international relationships for the Victorian arts industry	449,027
Film Victoria Victorian Multi Media Awards for Excellence - awards for recognition of excellence and innovation in multi-arts technology and information services.	283,739
Moomba International River Festival - towards the development of a world class 3 day River Festival	300,000
Frankston Cultural Centre - funding towards Stage 1 of the development.	500,000
Circus Oz - acquisition and renovation of premises.	499,115
Mooroopna Secondary College Performing Arts Centre - contribution towards construction of performing arts centre for the Shepparton district	400,000
Melbourne Symphony Orchestra Development Fund - program to facilitate expansion and development of the Orchestra	1,800,000
Melbourne Maritime Museum - Schooner 'Enterprise' labour costs	100,000
Victoria State Opera - operating assistance	2,400,000
Truscott Botanica - display at the 1994 Melbourne International Festival of the Arts	250,000
Castlemaine Library Hall - development for performing arts use	110,000
Bendigo Art Gallery - contribution towards Gallery development	750,000
National Wool Museum - exhibition development	400,000
Australian Children's Book Collection - purchase for State Library	360,000
Film Victoria - Melbourne Film Office establishment	500,000
State Library - VICNET Library Information Network	390,000
Old Treasury Building - display costs	295,000
Geelong Art Gallery – refurbishment	200,000
Dancehouse - refurbishment and redevelopment of Dancehouse premises into a world class dance facility and a focus for Victorian dance	244,378
Sale Gallery – relocation	621,000
Australian Film Institute Awards - contribution towards improved presentation of the AFI Awards so that the Awards are held in Victoria for three years	750,000
Victorian Design Awards	500,000
Playbox/Malthouse Front Tower Development - towards the restoration of the roof and building facade and expansion of facilities at the Malthouse	500,000
State Film Centre - Development of a Business Case Study and Functional Brief for the establishment of an Australian Centre for the Moving Image	95,581
Cultural Tourism - a strategy to maximise the potential of cultural tourism	195,407

Arts – Cont.	$
Film Victoria Melbourne Expo Market Feasibility Study - study into the feasibility of the establishment of a multimedia expo market in Melbourne	23,812
Arts Victoria International (Export) Touring Fund - to assist Victorian artists and arts companies to develop new sustainable markets world wide	598,894
Arts Victoria Visual Arts Awards increase arts sponsorship through recognition of sponsorship	750,000
Lillydale Museum Redevelopment - contribution towards restoration of the Museum building and construction of new public amenities and exhibition space	220,000
VicLink - provision of statewide public access to VicNet and Internet through computer links to all public libraries by 1998	1,378,717
Royal Botanic Gardens Arts Program - a series of cultural events in the Gardens	196,039
Film Victoria Interactive Multimedia Capacity - Interactive multimedia capability provision for Film Victoria to access external multimedia products to enable it to act as an industry assistance agency in developing new media arts and technologies in Victoria	200,000
Arts Victoria Arts Facilities Fund - establishment of a Fund within Arts Victoria to finance the development and construction of arts facilities...	300,000
NASMA Project Team - contribution towards operating expenses of the Point Cook National Air and Space Museum of Australia project team...	139,408
Opera 2000 Development Fund for New Productions - a Fund to assist the development of new and innovative operatic works	1,000,000
Bendigo Regional Arts Centre - contribution towards the purchase of a Steinway Concert Grand piano	102,500
Builders and Buildings Touring Exhibition	172,380
Geelong Courthouse Project - development of a youth / arts facility	493,000
Portland Maritime Museum and Tourist Information Centre	1,200,000
Ballarat Gallery - purchase of the Charles Doudiet Eureka Watercolours	100,000
Footscray Community Arts Centre - redevelopment of existing facilities and provision of new performance venues and exhibition spaces	700,000
Polyglot Puppet Theatre - upgrade of seating and sound system and provision of touring vehicles	172,000
Wangaratta Cathedral Organ - contribution towards the acquisition of organ	38,633
Redevelopment and fitout of the Koori Heritage Trust premises	500,000
Installation of a lift at the Royal Exhibition Building	550,000
Cowes Community Centre - redevelopment and refurbishment of the former Shire Offices	250,000
Establishment on an Immigration Museum at Old Customs House................................	20,700,000
Yarram Regent Theatre Development...	250,000
Studies into the establishment of a National Air and Space Museum in Victoria............	1,180,934
Future Harvest - a travelling exhibition looking at the past present and future of farming	285,000
Restoration of pipe organ at St Andrews Church Morwell	4,188
Relocation of the Planetarium to Scienceworks	6,000,000
Creation of outdoor stage for use at the Bendigo Festival and other local events...........	20,000

Arts – Cont.	$
Arts Victoria Touring Victoria Program - to provide improved and increased access to quality arts programming for regional and country audiences	2,000,000
Development of the Emerald Arts and Community Centre	650,000
Acquisition and renovation of premises that house the Victorian Tapestry Workshop	670,000
Redevelopment of the Horsham Art Gallery to provide climate control, additional exhibition space and improved access	300,000
Redevelopment of the Wesley Performing Arts Centre in Horsham.	240,000
Refurbishment of Glen Eira Community Theatrette	30,000
Lowanna College Community Auditorium - construction of an auditorium for use by the Moe and Newborough district community.	270,000
Construction of a community performing arts centre at Benalla College	339,000
Construction of the Colac community performing arts, entertainment and community centre	2,000,000
Restoration and additions to the Ballam Park Historical Complex Frankston	85,000
Construction of the Bellarine Peninsula Multi Purpose Facility	750,000
East Gippsland Arts and Cultural Centre	551,500
Mansfield Performing Arts Centre construction	400,000
Brauer College Performing Arts/Multi purpose facility	150,000
Air conditioning for Plaza Theatre Kyabram	125,000
Hamilton Arts Complex upgrade	250,000
"The Caretaker's Family" exhibition downstairs at Old Treasury.	94,850
Swan Hill sound shell public address system	16,000
Seymour Performing Arts, Culture and Civic Centre development	480,000
Moonee Ponds Community Cultural Centre development	1,500,000
Redevelopment of Centenary Hall Werribee	1,500,000
Toomuc Valley Art and Design Centre	2,000,000
Total : Arts	**$69,595,452**
Tourism	
Ski Victoria - marketing campaign	600,000
Tourist Information Network - to establish a statewide network of tourist information outlets	240,000
Werribee Zoo Master Plan Stage 1 - towards the development of visitor amenities.	500,000
Royal Botanic Gardens Signage - towards the development and installation of a new signage system for the Gardens	200,000
Regional Tourism Monitoring Program - survey to obtain information regarding the level of tourism activity in each of the regions in Victoria.	600,000
Port Philip Bay Bid - to secure the rights for the 1998 America’s Cup Challenge to be contested on Port Phillip Bay	1,500,000
Gum San Chinese Pagoda - Ararat - contribution towards construction of Gum San Chinese Pagoda incorporating museum, seminar/meeting room facilities and restaurant	600,000
Coal Creek Historical Village - Business and Marketing Plan	18,750

Tourism – Cont.	$
City of Ballarat EUREKA project - development of a Eureka Rebellion interpretative centre incorporating museum, seminar/meeting room facilities and restaurant..............	2,400,000
Warburton Visitor Information Centre - contribution towards the development of the Centre..........	250,000
Sovereign Hill, Ballarat - development of visitor facilities and the creation and enhancement of displays..........	422,000
Emerald Tourist Railway - contribution towards Stage 1 of a major expansion program..........	500,000
Development of the Geelong and Great Ocean Road Visitor Information Centre.	150,000
Development of visitor amenities at BUDA Historic Home and Garden, Castlemaine.....	149,953
Development of the Sunraysia Visitor Information Centre at Mildura	100,000
1996 and 1997 Australian Tennis Opens prize money..........	1,500,000
Bendigo Chinese Museum Classical Gardens – construction of the classical gardens...	350,000
Melbourne International Flower and Garden Show – contribution towards establishment of an annual show	200,000
Regional Tourism Development Plans - contribution towards the preparation of integrated tourism development plans for each of the tourist regions of Victoria............	720,000
National Wool Week - contribution towards costs of implementing development strategies for the growth of the National Wool Week festival..........	150,000
National Trust of Australia (Victoria) - Como House – assistance towards Stage 1 of the Como House Tourism Enhancement Project including construction of a gatehouse information centre, tourist bus park, gift shop / cafe and museum space	470,000
Melbourne International Fashion Festival establishment..........	750,000
Regional Tourism Signage - major upgrade..........	3,450,000
Great Ocean Road Infrastructure Feasibility and Planning studies for major projects identified in a review of infrastructure along the Great Ocean Road	50,000
Royal Melbourne Zoo Australian Habitat Zone – contribution towards the development of an Australian habitat zone at the Zoo.	500,000
Melbourne Airport Tourism Signage - development and installation of an integrated system of tourism signage in the international arrivals area..........	293,852
Old Customs House Sydney - establishment of a Victorian tourism display and interactive information centre	70,000
Victoria Tourism Display - establishment of a transportable display promoting tourism in Victoria for use at the Atlanta Olympics, the Mexico World Athletic Championships and the 1998 World Cup Soccer, as a lead up to the Sydney 2000 Olympics..........	188,500
Musikanten Stadl Folk Concert - contribution towards costs of staging concert in Melbourne in September 1995	200,000
CD ROM Tourism Victoria - funding for the development of a CD-ROM containing Victorian regional tourism survey data for use by investors and developers.	133,745
Victorian Wineries Tourism Council - contribution towards the cost of the Victorian display at the Wine Australia 1996 event held in Sydney in June 1996..........	100,000
Funding for international airline promotions - funding for promotions to improve inbound demand for Victoria as a tourist destination..........	520,000
Central Deborah Gold Mine redevelopment	457,000

Tourism – Cont.	$
Chaffey Trail Tourist Drive - "self-drive" tour based on maps, tapes, signs and multimedia	44,880
Flagstaff Hill Audio Activation - Museum "sight and sound" activation of maritime village	65,000
Ballarat Tourist Information Centre Redevelopment – upgrading of Centre	150,000
Phillip Island Penguin Reserve Redevelopment - provision of theatrette, playground and interactive exhibits, with upgrade of visitor centre facilities	627,900
Sorrento-Queenscliff Ferry Touch Screens - computer touch screens providing information on regional attractions to ferry passengers	53,000
Kyabram Fauna Park - establishment of Environmental Resource Centre	390,000
WW11 Catalina Flying Boat Museum Lake Boga	77,275
Gembrook Station Restoration - redevelopment of the original terminus at Gembrook	500,000
Healesville Sanctuary Platypus Exhibit - provision of theatre and multimedia technology	196,657
Nagambie Tourist Information Centre - establishment of Goulburn Murray visitor information centre	39,865
Diamond Valley Railway - upgrading railway amenities, passenger access and carrying capacity	75,000
Historic Towns Tourist Drive - Indigo Shire - Tourism Trails with signposting and mapping of the historic towns and features of the region	72,400
Split Point Lighthouse - upgrading public access and viewing of operations of functioning lighthouse	70,000
Wodonga Gateway Island Feasibility Study	120,000
Upgrade and refurbishment of the Coal Creek Historical Village	500,000
Oasis Region Communication Link - provision of Information Technology services between the Oasis Region Tourist Information Centres	86,428
Apollo Bay Eco-tourism Interpretive Centre - broadening of tourism information provided to include ecological features of the region	177,990
Otway Ranges Drive - upgrading of visitor facilities and viewing points along the driving trail	80,000
Establishment of the International Rose Show	76,000
Old Ararat Gaol - Restoration of J Ward	600,000
Elmore Farmshed Experience - establishment of an interpretive centre depicting the development of rural Victoria at the turn of the century	200,000
Royal Botanic Gardens - construction of a gateway visitor complex on the Observatory site	2,000,000
Kinglake West rest stop and information bay construction	78,000
Relocation of the Ararat Visitor Information Centre	160,000
Development of the Millewa Pioneer Forest & Historical Park Interpretive Centre	3,500
Walhalla Goldfields Railway Stage 2 - to link the Railway from the Thomson River recreation area to Walhalla	500,000
Restoration of the Paddle Steamer Gem at the Swan Hill Pioneer Settlement	215,000
Establishment of the Dandenong Ranges Visitor Information Centre	65,000

Tourism - Cont.	$
Redevelopment of the Hanging Rock Reserve	246,000
Expansion of display facilities at the Lake Goldsmith steam engine complex.	100,000
Relocation and fitout of the Castlemaine Visitor Information Centre.	184,000
Stage 1 of the Murray to the Mountains Rail Trail	1,513,000
Development of new exhibits at Melbourne Zoo	7,000,000
New mining experience and gold museum exhibit at Sovereign Hill	1,295,000
Beechworth Historic Towns Heritage and Cultural Centre development.	470,000
Daylesford Visitor Information Centre	205,000
Total: Tourism	**$36,570,695**
Sport and Recreation	
5th Australian Masters Games - contribution to Games	125,000
Albert Park Squash Centre – repairs	36,584
Altona Softball/Baseball Centre - upgrade and redevelopment of second baseball/softball pitch	25,000
Melbourne Sports & Aquatic Centre - construction and fitout of the Centre.	55,500,000
V.I.S. Athlete Program - scholarships and development program for Victorian athletes	2,680,000
Moomba Masters Water Skiing - upgrade of equipment	50,000
Indoor Velodrome - Feasibility study	49,609
Provision of Floodlighting at the South Melbourne Soccer Ground	357,400
Royal Park Sports Precinct - Feasibility Study into the upgrading of Netball and Hockey facilities	45,000
Sport and Recreation Minor Facilities Grants Scheme - for the provision of local community sport and recreation facilities	10,000,000
Eildon Slalom Site - development of an international standard white water canoe course	50,000
Ballarat Community Adventure Playground - provision of playground facility incorporating special features for children with disabilities	50,000
Irymple Bocce Club - roofing of bocce courts	30,498
Development of the Whorouly Recreation Hall	116,115
Construction of an indoor sports and cultural facility at Langwarrin.	650,000
Lifesaving into the 21st Century - program to upgrade/redevelop existing beach and bay life saving facilities	6,000,000
Construction of a pathway between Kiewa and Tangambalanga	60,000
Redevelopment of the hockey and netball facilities at Royal Park	27,000,000
Extension of the Henderson Pavilion at the Rutherglen Showgrounds	50,000
Construction of a rotunda in sensory garden at Wyndham Centre for Intellectually Disabled	30,000
Construction of combined skate bowl and sound shell for sports or performing arts activities at Mirboo North	10,000
Redevelopment of recreation facilities at Lake Weeroona, Bendigo.	250,000

Sport and Recreation – Cont.	$
Better Pools - Aquatic Facility Funding Program	20,000,000
Total : Sport and Recreation	**$123,165,206**
Turning the Tide Drug Initiatives	
Upgrade of drug detection, deterrence and treatment strategies in prisons	7,296,463
Research into the possible links between the use of cannabis and the onset of schizophrenia.	795,000
Establishment of a specialist court advisory service on treatment services and the establishment of intensive post release treatment services for prisoners.	21,446,264
Development of and training in core competencies for key workers that come into contact with people affected by drugs.	6,000,000
A program to support local level community partnerships to address drug and drug related problems.	2,250,000
Testing of offenders with community correction orders.	1,577,154
Household Booklet - Production and distribution of a booklet to all households in Victoria providing information on the impact of drugs on the family and society.	1,238,243
Household Booklet - Pre-release advertising	322,000
Individual School Drug Education Strategies - to educate students on the harmful effects of drug use	13,987,703
Project to ensure that parents are informed and consulted on the Individual School Drug Education Strategies.	1,525,205
Youth Substance Abuse Service - provision of a variety of substance abuse services for people aged between 14 and 24 years.	14,935,754
Program to increase the capability of alcohol and drug counselling services as well as providing linkages to related support services.	12,859,786
Increase the efficiency of the Victoria Police Drug Squad through provision of state of the art computer equipment.	170,000
Project to develop and implement the Intranet Intelligence Management System for the Victoria Police Force Asian Squad.	169,268
Connect - a program to retain or reintroduce into schools young people vulnerable to problems associated with harmful substance abuse.	1,695,640
Investigation of substitute medications for withdrawal and ongoing supportive management of opiate dependencies.	3,160,000
Establishment of a database to enable analysis and comparison of a wide range of data to assist in the allocation of enforcement and treatment resources.	897,081
Communication of harm minimisation philosophies and strategies throughout the Victoria Police Force	324,637
Increase of knowledge and awareness of all Victoria Police Force trainers on drug and alcohol issues and the development of teaching materials.	413,329
Drugs and Driving Research Project	175,000
Establishment of benchmark data on community knowledge and acceptance of harm minimisation initiatives.	20,678
Preparation of a detailed brief for the evaluation of the Turning the Tide initiatives	51,950
Program to ensure that the drugs policy reaches all ethnic groups.	456,367
1st International Conference on Drugs & Youth	20,000
Community Education and Information Strategy 1997/98	1,003,482

Turning the Tide – Cont.	$
Illicit Drug Users Community Education Initiative 1997/98	95,000
Preventative Drug Education in Primary Schools	400,000
Increased support within custodial centres for juvenile offenders	1,084,017
Establishment of a network of accommodation for youth withdrawal	3,430,930
Establishment of accommodation for women in post withdrawal	444,427
Evaluation of Turning the Tide	392,735
Prevention and community involvement activities	1,182,564
Total : Turning the Tide	**99,820,677**
Other	
Old Mildura Homestead - restoration of steam engine	5,000
Establishment of the Boort Community Airstrip	50,000
Rural Community Development Scheme - a program to develop community infrastructure and assets in country Victoria	13,000,000
Construction of a Community Hydrotherapy Centre at Dandenong Valley School	100,000
Gippsland Base Hospital Sale - construction of a helicopter landing site	23,900
Alfred Deakin Centre construction of community rooms	400,000
Provision of trailers and wheelchair hoists for regional mobile libraries	2,480,000
Relocation of Creswick Library	7,172
Relocation of the Upper Murray Historical Society	5,500
Development of the Lorne Community Centre	85,000
Bone Marrow Institute Accommodation Centre - fitout of accommodation units	1,722,000
Maffra Recreation Hall Development	180,000
Extension to Spring Creek Community House Torquay	64,000
Kyabram Community Centre - construction and fitout	550,000
Bright Youth Club Hall Extensions	80,000
Lakes Entrance and District Civic Centre Development	1,000,000
Extensions to the Mornington Community Information and Support Centre	105,000
Victorian Water Safety Initiative 1998-2001	6,000,000
Construction of Multi-Purpose Pavillion at Longernong	132,500
Renovations and fitout to Rosebud Community Information Centre	36,000
University of the Third Age Sunraysia, equipment modification to improve participant usage	480
Beechworth CWA piano restoration	465
Infrastructure for International Dairy Week at Tatura	1,500,000
Bush Nursing Hospitals and Centres Capital Improvement Program	6,000,000
Paynesville Multipurpose Community Complex development	310,000
Ballarat Adult and Further Education Centre refurbishment	350,000
Yarrawonga Community Centre development	50,000
Centenary of Federation Celebrations	13,550,000

Other – Cont.	$
Trust for Nature (Vic) community education resource development.	25,000
Capital assistance fund for disability service agencies	6,000,000
Access for the older person funding program	1,000,000
Maroondah Heritage Estate - Development of a community, cultural and educational facility in Ringwood	1,215,000
Maryborough Community Resource and Exhibition Centre	975,000
Development of community meeting facility at Birchip	75,000
Renovation of the RK Senior Community Hall Chadstone	550,000
Total : Other	**$57,627,017**